

Using Global ELT Data to Identify New Recruitment Opportunities

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BONARD
EDUCATION

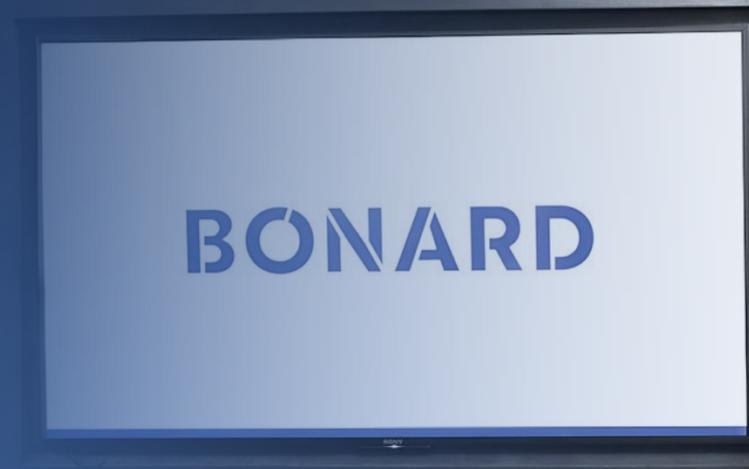


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Empowering progress

Established in 2007, BONARD Education is an independent market research and strategic development firm specialising in international education.

We accompany education providers, associations, governments, and investors on their journey to make international education a transparent, thriving, and transformative industry.



Our team

 **4**
Offices

 **91**
Specialists

 **623**
Projects conducted

Industry memberships and affiliations

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Individual

 **RICS**

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Association of Australia

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Langues Canada

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 **Education First**

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 **UNIVERSITY OF BRIDGEPORT**

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ENGLISH LANGUAGE ACADEMY

 **University of Windsor**

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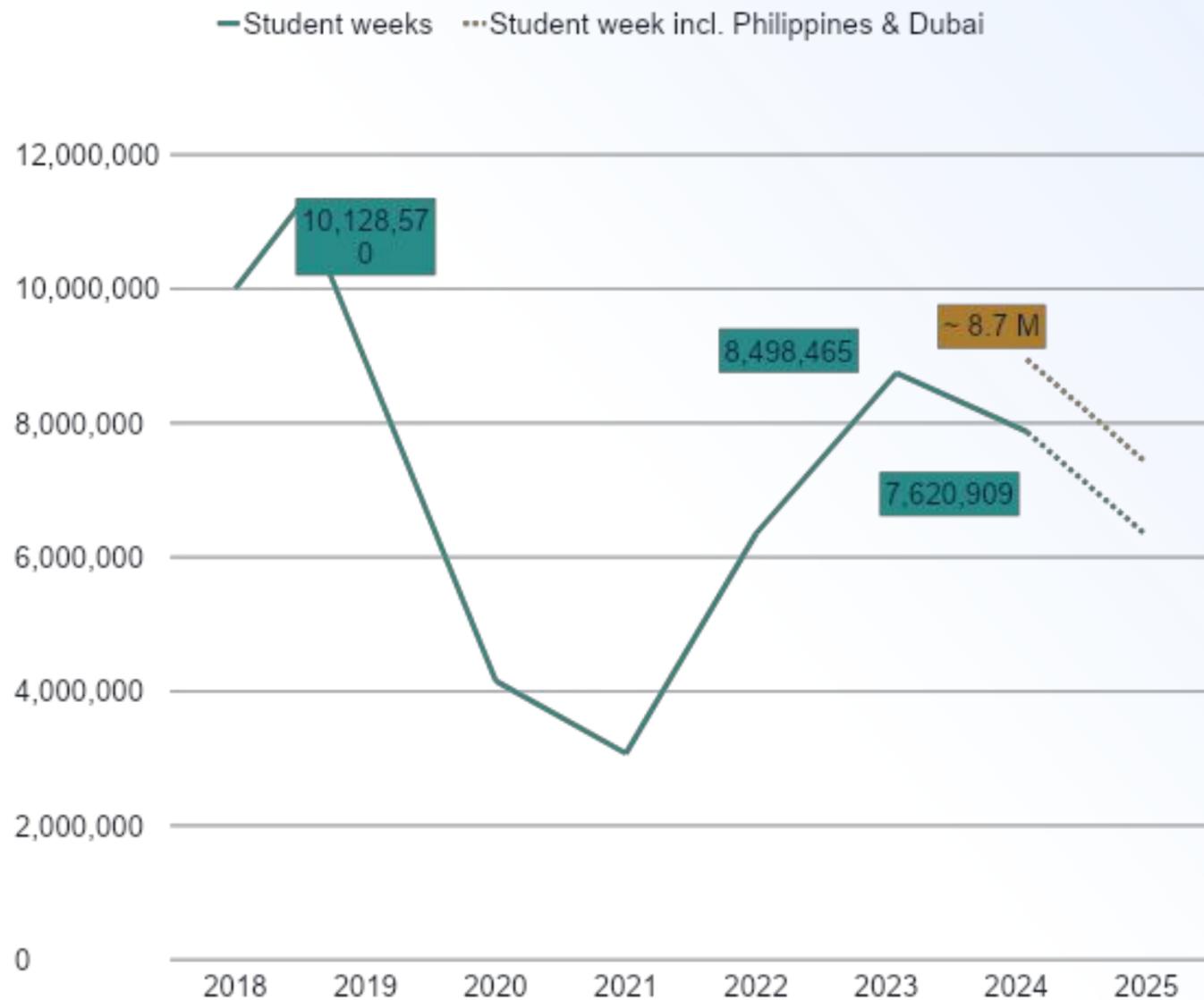
PART 1

Global **ELT** sector data

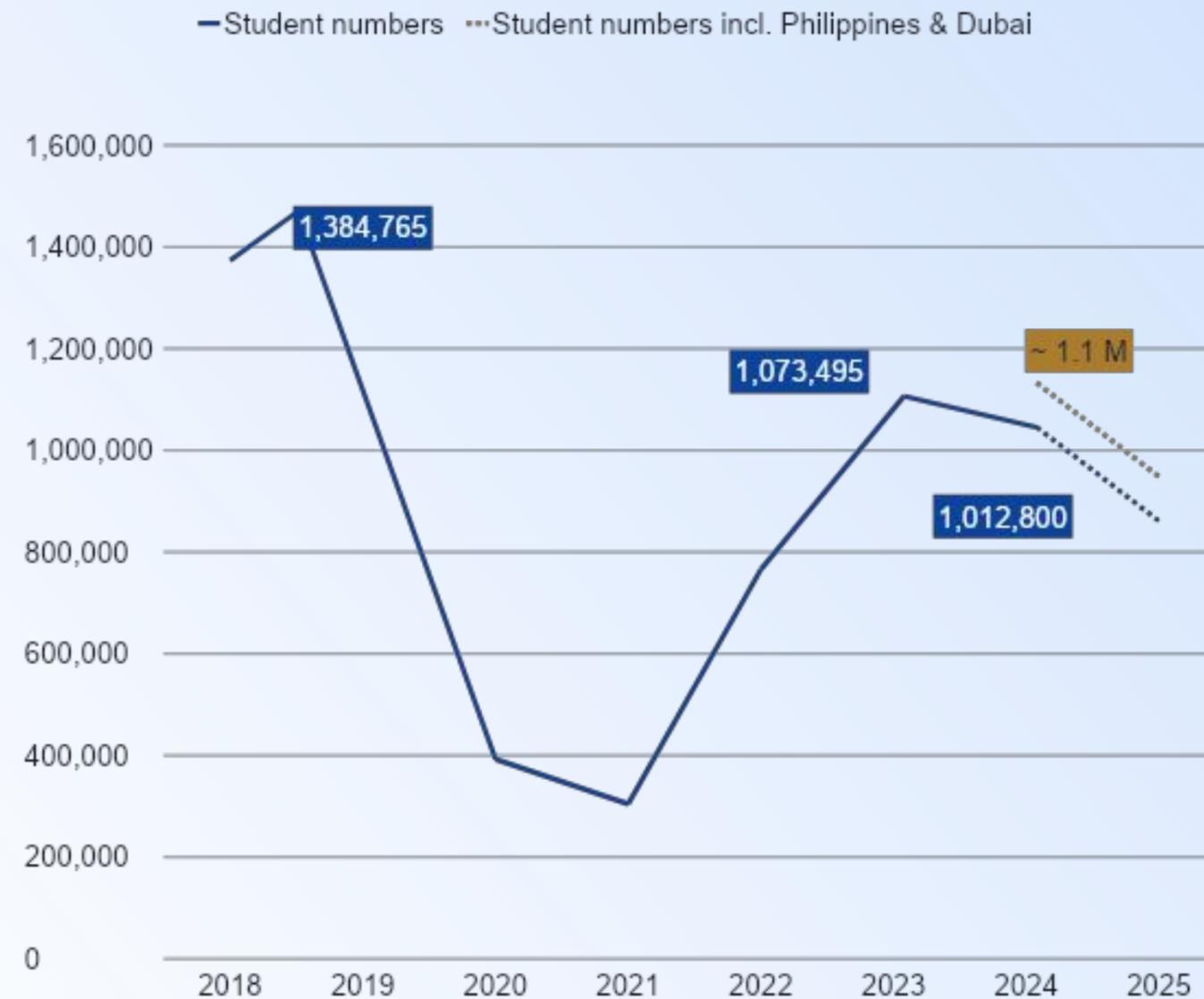
English Language Teaching

Global ELT market size

STUDENT WEEKS

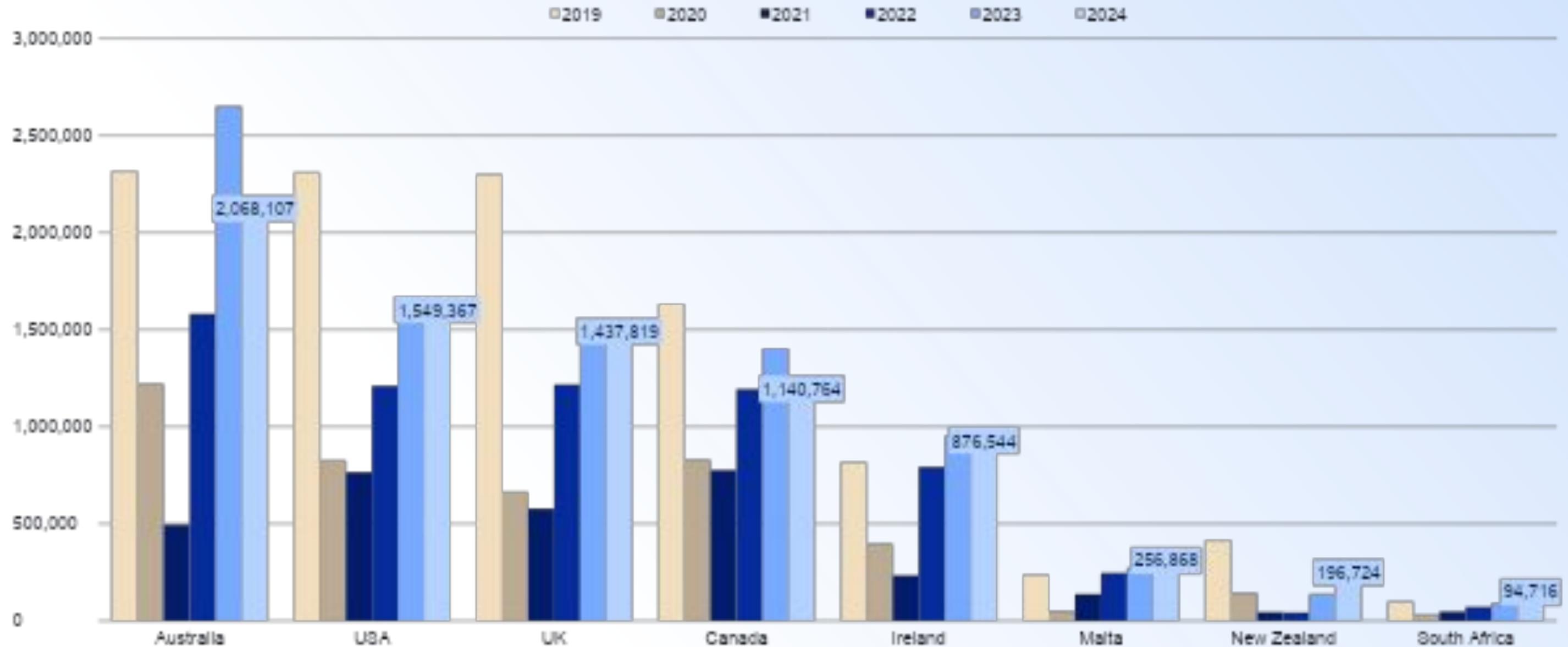


STUDENT NUMBERS



Source: English Australia, Languages Canada, English UK, EnglishUSA, English Education in Ireland, Education South Africa, Education New Zealand, National Statistics Office Malta & BONARD, 2025
 Note: Global ELT overview covers 8 major ELT destinations: Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the US

Student weeks by study destination



Source: English Australia, Languages Canada, English UK, EnglishUSA, English Education in Ireland, Education South Africa, Education New Zealand, National Statistics Office Malta & BONARD, 2025

Student numbers by study destination

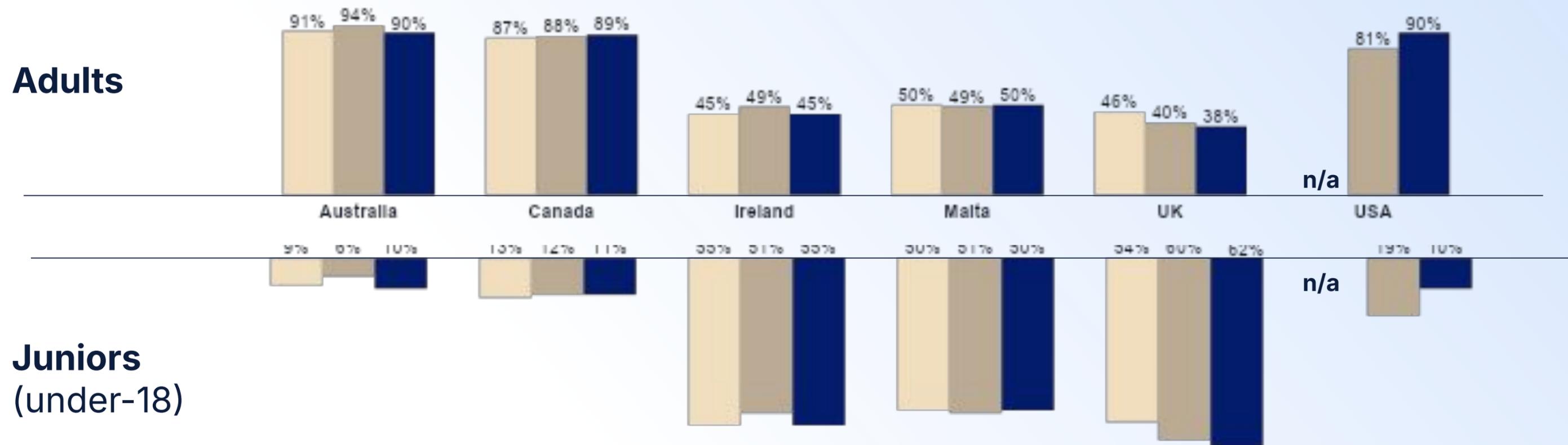


Source: English Australia, Languages Canada, English UK, EnglishUSA, English Education in Ireland, Education South Africa, Education New Zealand, National Statistics Office Malta & BONARD, 2025

Adult to junior ratio

STUDENT NUMBERS

● 2019 ● 2023 ● 2024



Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English UK, EnglishUSA, BONARD, 2025

ELT in 2024 source market changes

STUDENT WEEKS

2019

2024



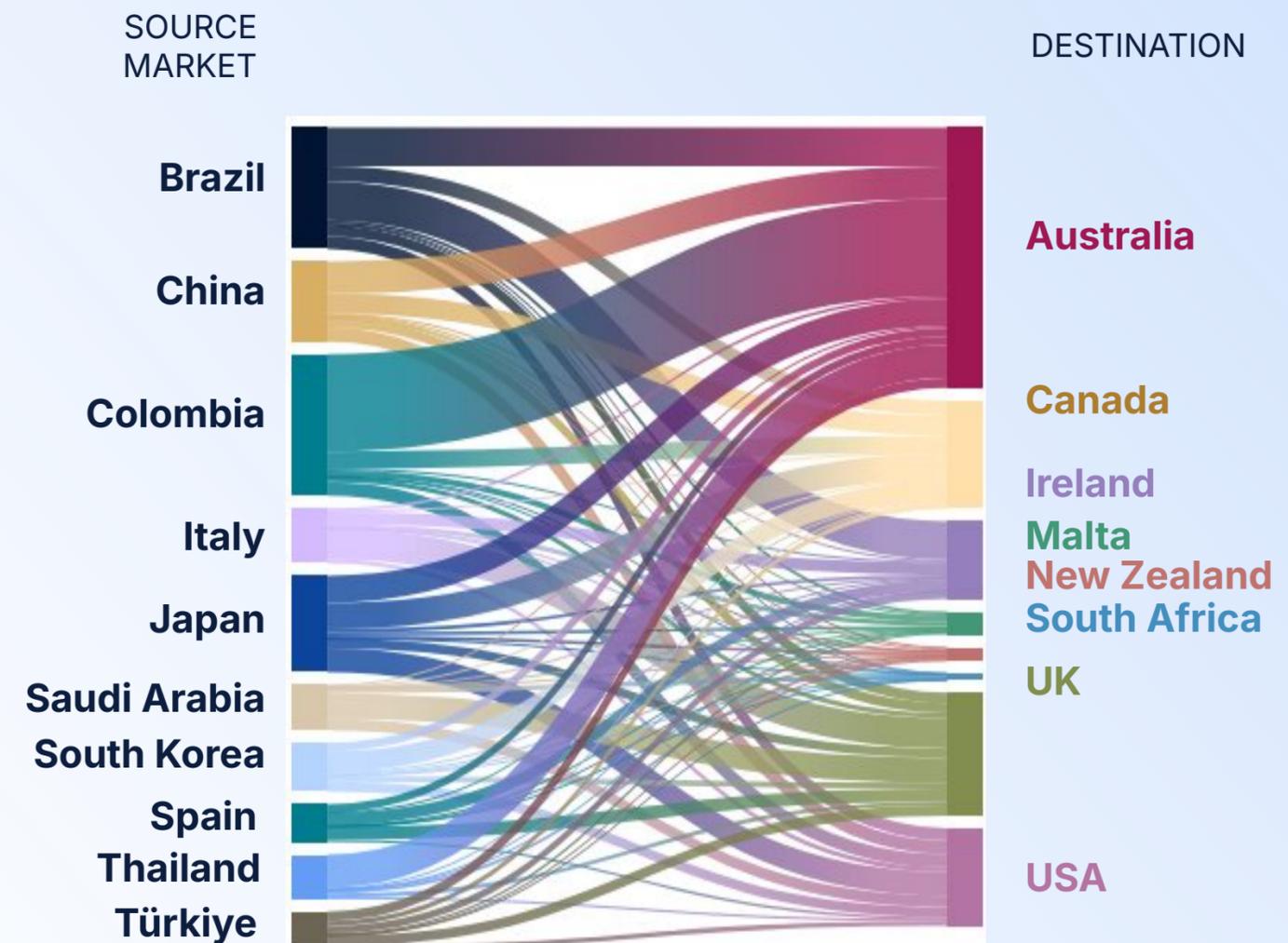
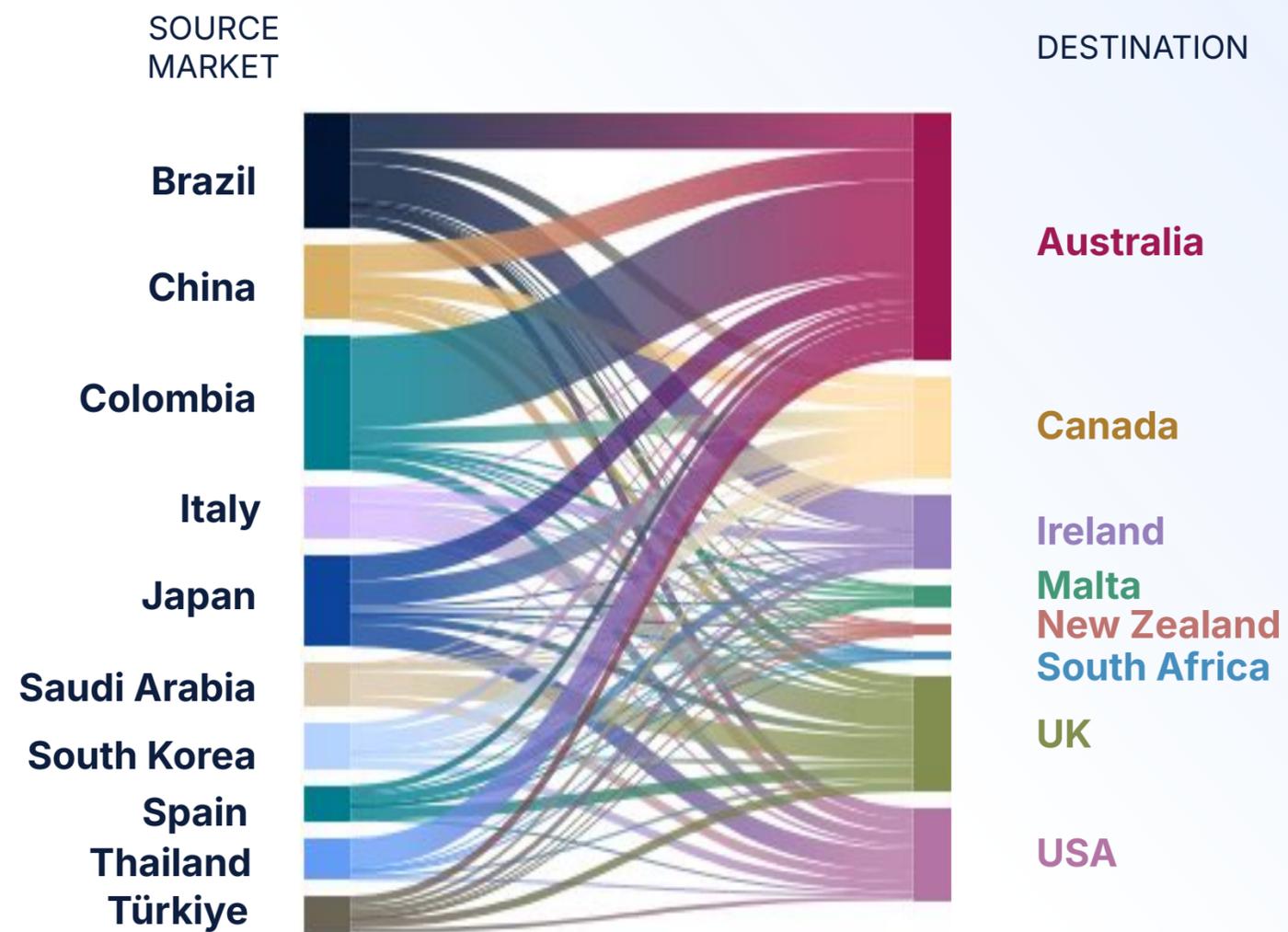
Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2025

ELT in 2024 source market changes

STUDENT WEEKS

2023

2024



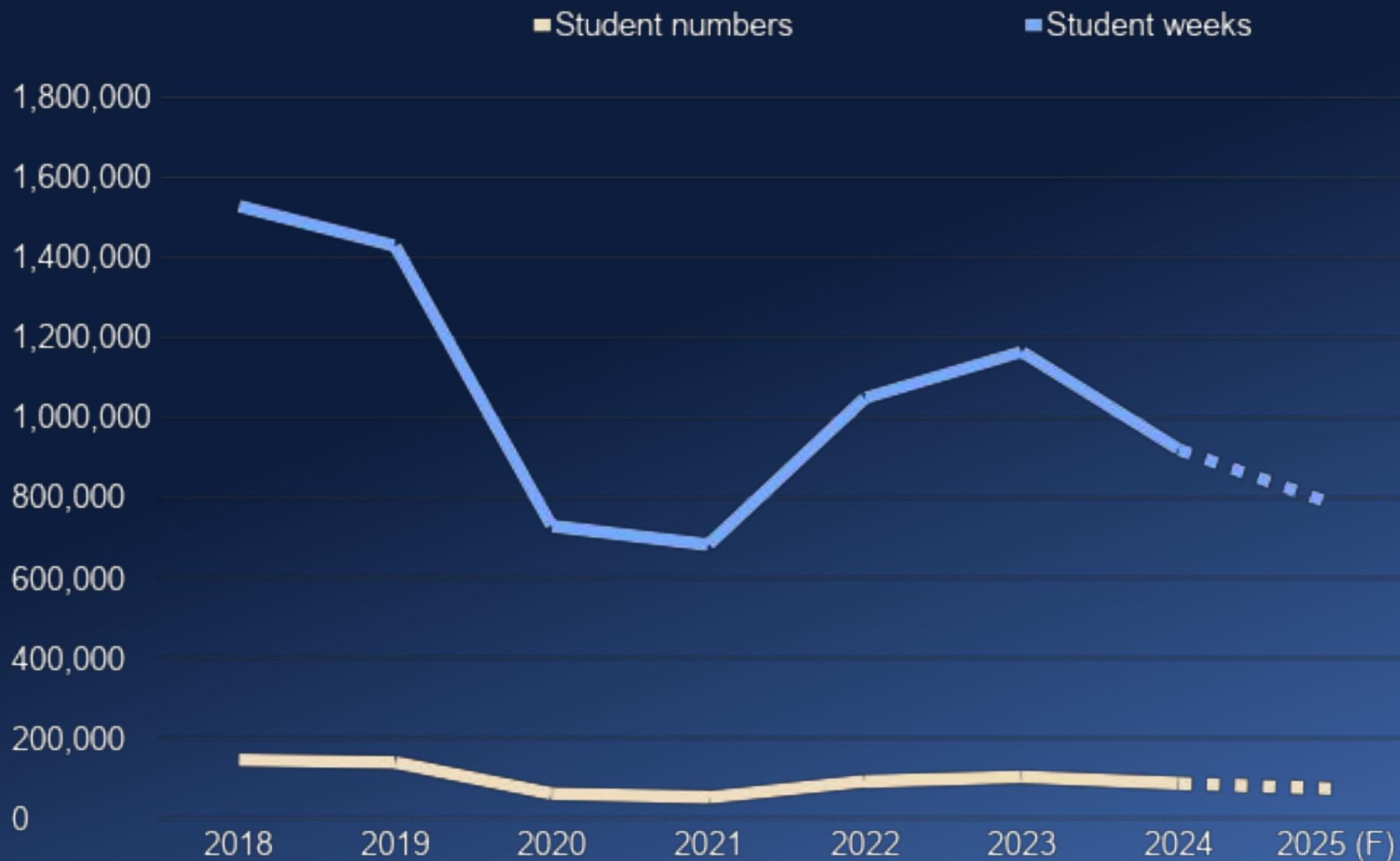
Source: English Australia, Languages Canada, English Education in Ireland, National Statistical Office, English New Zealand, English South Africa, English UK, EnglishUSA, BONARD, 2025

PART 2

Canada

ELT market overview

Canada: sector data

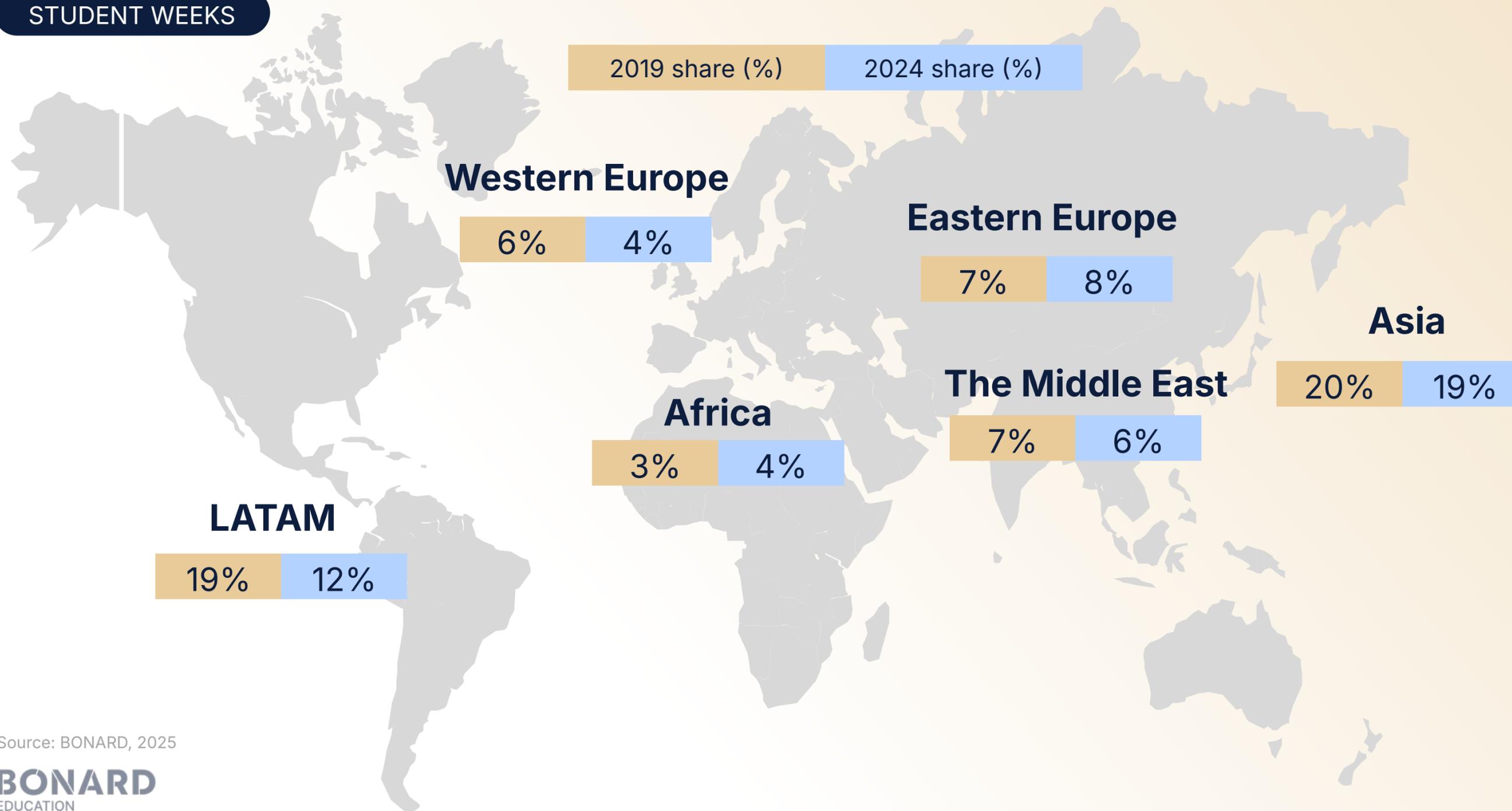


Source: Languages Canada & BONARD, 2025

- **15% decline** projected in student numbers (2025)
- **20% reduction in student weeks** (2025)
- Decreasing average length of stay
- Continued decline in pathway program enrolments
- **Junior segment** demonstrates stronger **resilience**, particularly in summer camps
- **Asia becomes the largest source region**, overtaking South America in 2024

Canada's market share

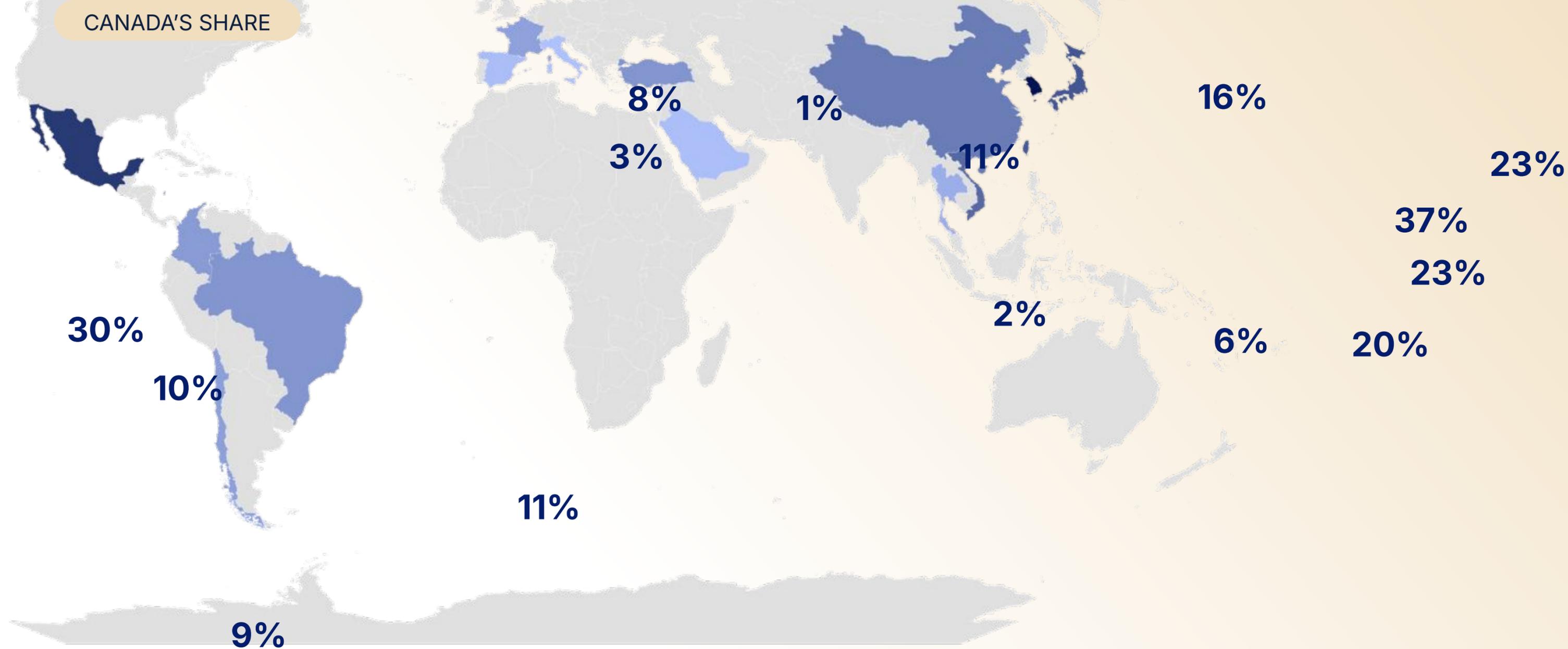
STUDENT WEEKS



Source: BONARD, 2025

Top 10 source markets globally in 2024

CANADA'S SHARE



Source: BONARD, 2025

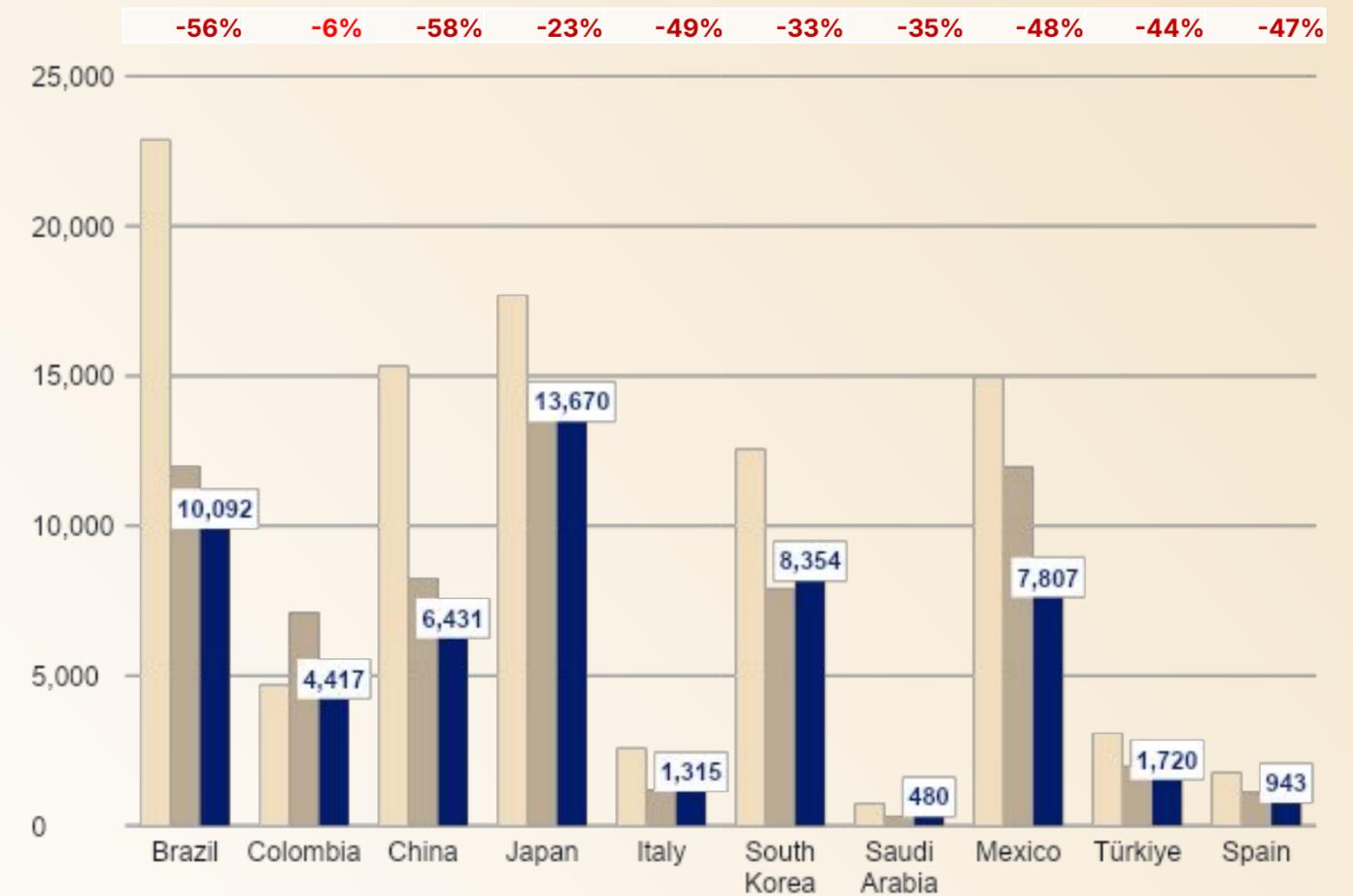
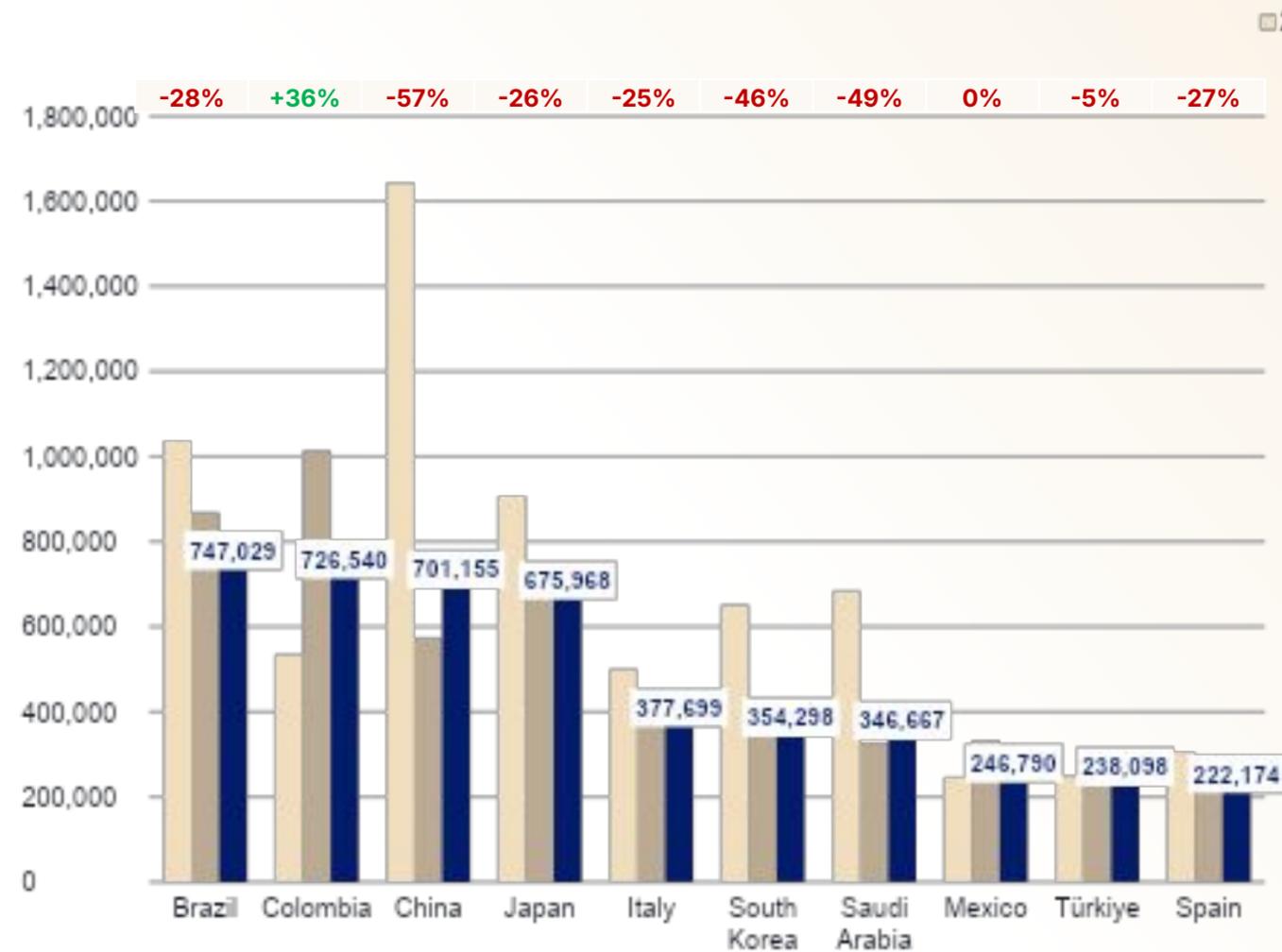


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Top 10 source markets and change

GLOBALLY (STUDENT WEEKS)

CANADA (STUDENT NUMBERS)



Source: Languages Canada & BONARD, 2025



Top 10 source markets overview by sector

STUDENT NUMBERS

2024

2025*

Private sector	Student numbers	Public sector	Student numbers
Japan	10,401	Japan	3,269
Brazil	9,975	China	2,276
Mexico	7,379	Canada	1,900
South Korea	7,109	South Korea	1,245
China	4,155	Vietnam	571
Colombia	4,151	Rest of Africa	450
Taiwan	3,131	Mexico	428
France	2,107	Rest of The Middle East	269
Türkiye	1,545	Colombia	266
Italy	1,309	Taiwan	218

Private sector	Public sector
Brazil	Japan
Japan	Canada
South Korea	China
Mexico	South Korea
Taiwan	Vietnam
Colombia	Mexico
France	Türkiye
China	Ivory Coast
Canada	Iran
Saudi Arabia	Hong Kong

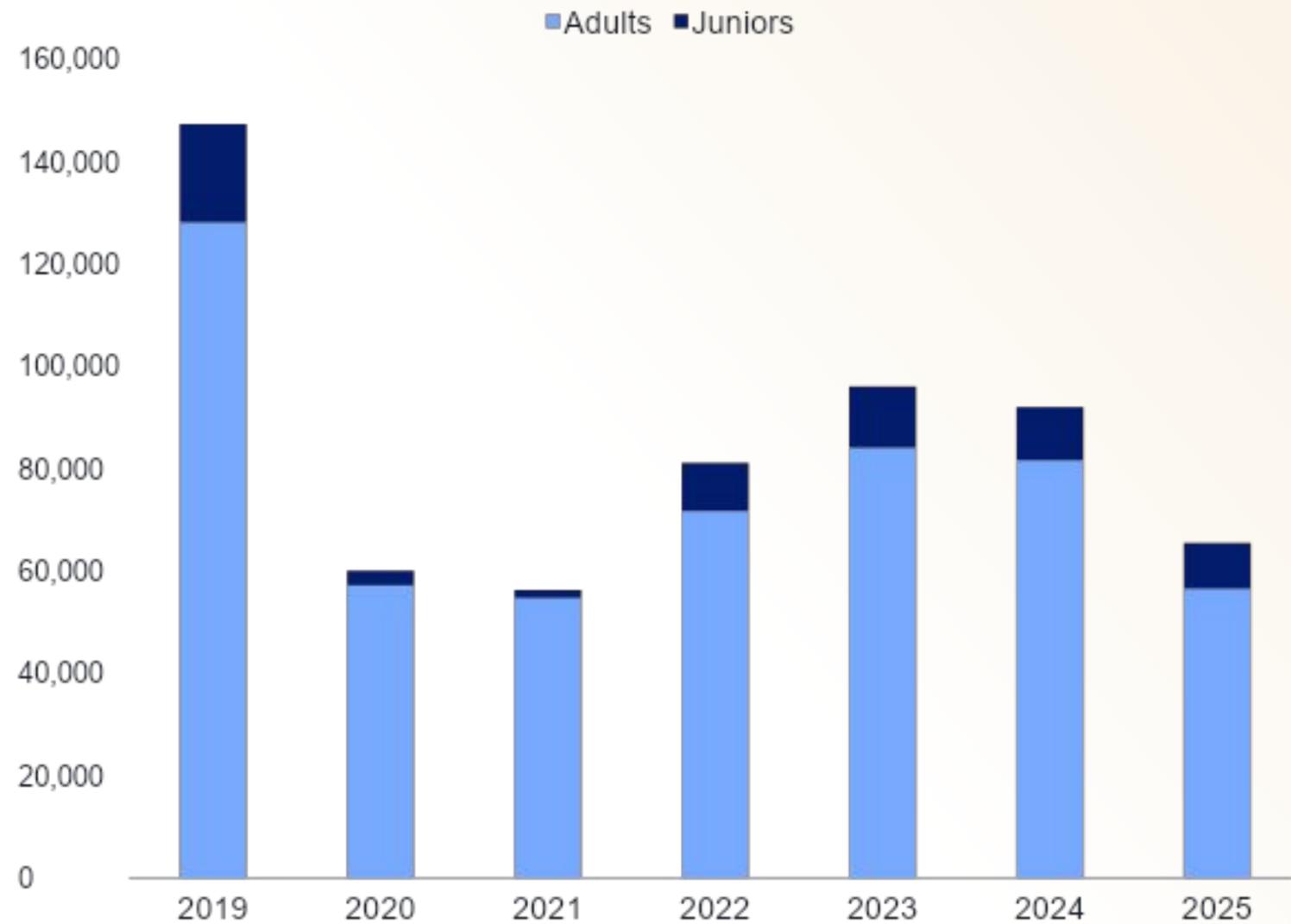
Source: Languages Canada & BONARD, 2025

Note: 2025 Data is based on Term Based Reporting Scheme. Sample size: 120 participating members in Term 1; n= 132 in Term 2 and n= 114 in Term 3

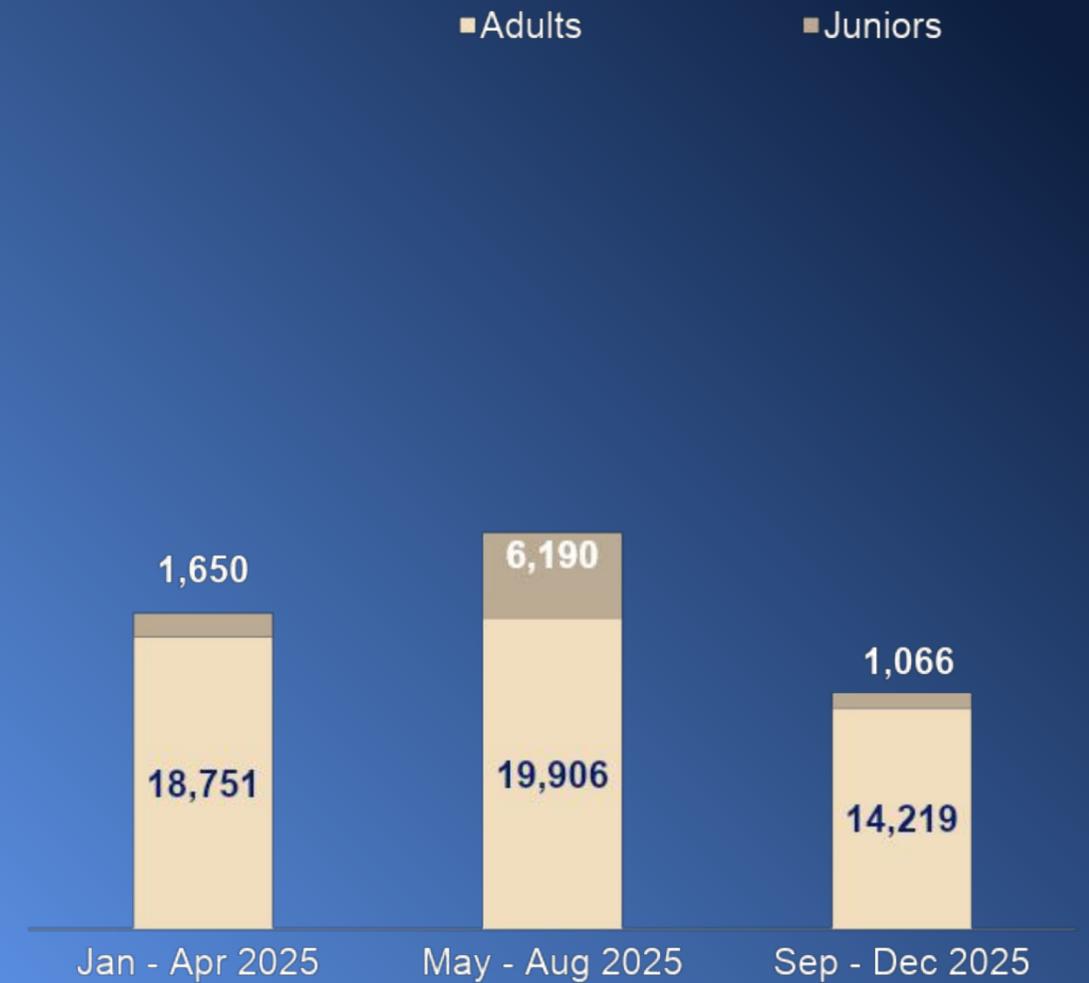


Age groups

STUDENT NUMBERS



2025 distribution (Term-based reporting scheme)

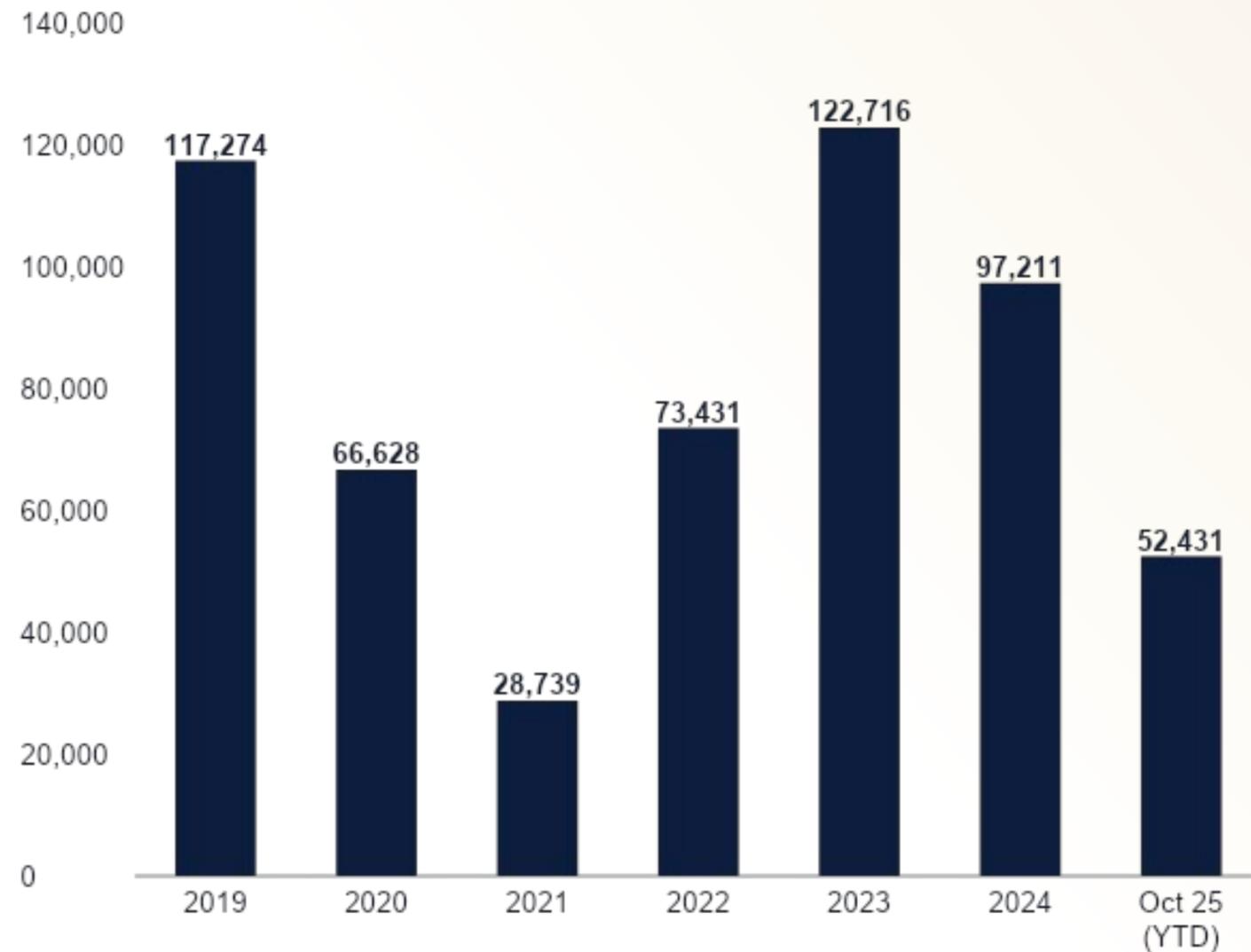


Source: Languages Canada & BONARD, 2025

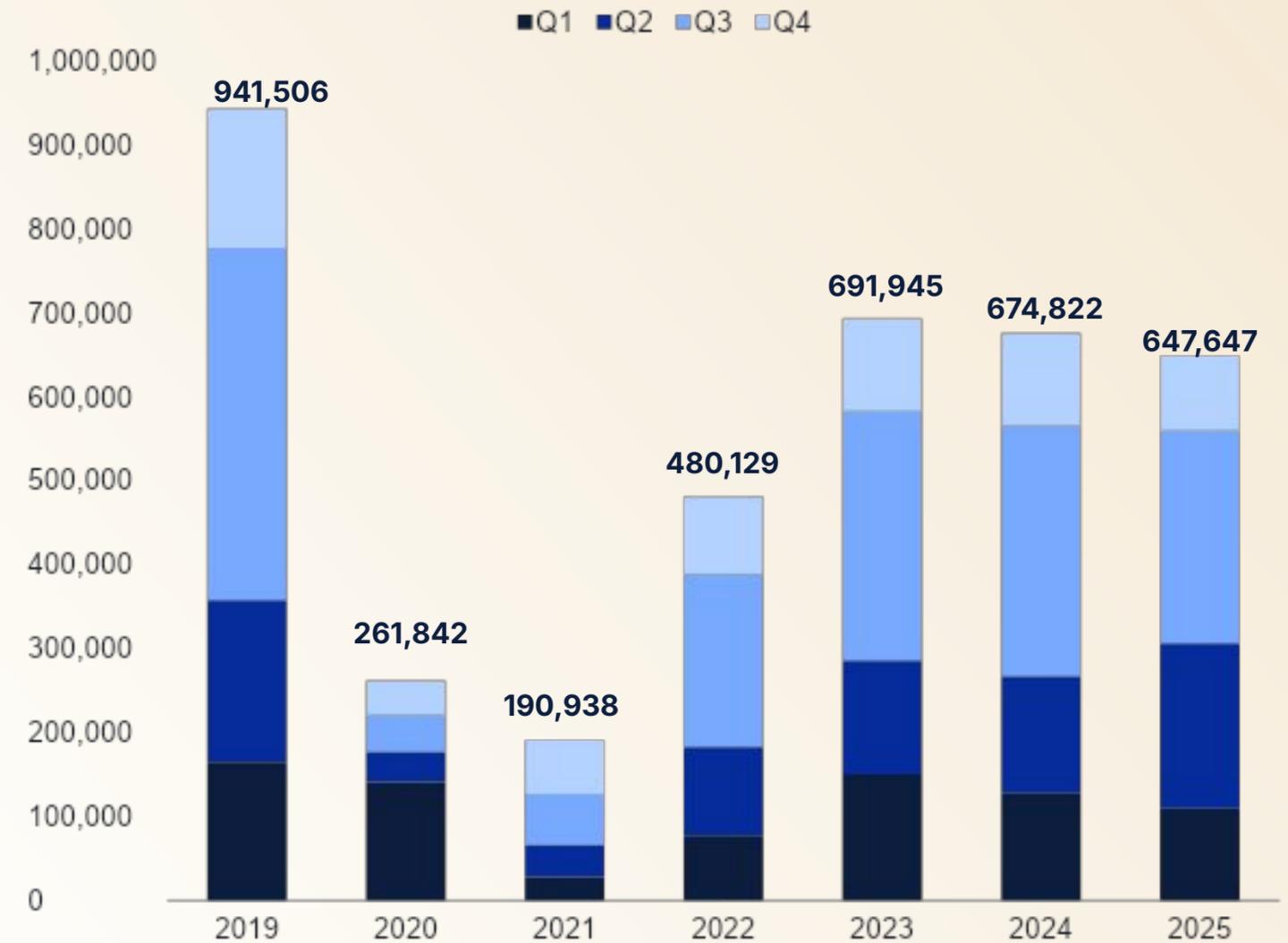


ELT market overview

COMMENCEMENTS



STUDENT WEEKS



Source: Australian Government, Department of Education, 2025, English UK & BONARD, 2025

Note: Australia Data available up to December 2025 + Oct - 2025



Sector in 2019



1.4m students
10.1m student weeks spent globally



Traditional junior destinations – 54% juniors
Other destinations – 86% adults



7.3 weeks average course duration globally



General English and EAP most attractive programs

2025 and beyond



English language student mobility – less weeks, consolidation on the market



Shifts in junior mobility – general English with additional activities



AI to affect English language learning



Continued shift to alternative destinations, more local options

Canada: Key trends in student recruitment



Agency recruitment increasing

In 2024, the share of students enrolled through agencies rose from 63% to 67%, driven largely by offshore education agencies, which accounted for 55% of agency-based enrolments.



Programme demand shifting

Growing move from purely academic programmes to programmes that include experiential components.



Pressure on Adult General English segment

Students are becoming more price-sensitive, facing competition from online alternatives, and staying for shorter periods.



Areas to consider for adult growth areas

English programmes linked to exam preparation (IELTS, Cambridge), professional development, and academic pathway progression.



Digital recruitment expanding

Greater use of digital lead-generation platforms, including AI-driven enquiry management and automated CRM nurturing.



ELT sector consolidation

The market is seeing group consolidation, investment-backed acquisitions, and expansion of multi-campus portfolios.

2025 Annual Survey is Open

Please submit your data by **March 31**

In case of questions please contact us at canada@bonard.com



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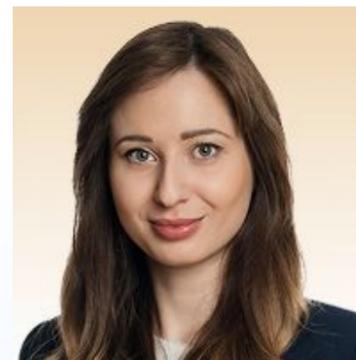
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