



English Language Learning Providers Impacted by Changing Student Visa & Immigration Policies



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Executive Summary

Recent shifts in visa and immigration policies in major English-speaking countries—the United States, United Kingdom, Canada, and Australia—are reshaping global student mobility trends and impacting English Language Learning (ELL) providers worldwide. Policy restrictions and rising costs are deterring students from these traditional study destinations, while non-English-speaking countries such as Germany, Malaysia, and the Netherlands are increasingly attracting international students by offering English-taught programs and streamlined visa processes.

This shift in study destinations presents both challenges and opportunities for ELL providers. Traditional, destination-based ELL programs may experience declines in enrollment as fewer students travel abroad for immersive English studies. Conversely, providers that embrace digital and hybrid learning, offer shorter or specialized programs, and partner with universities and corporations in emerging education hubs are positioned to capture new demand.

Overall, while traditional markets experience pressure, the global demand for English skills remains strong. ELL providers that adapt their strategies—through flexible learning models, industry-specific courses, and digital innovation—can continue to thrive in an evolving international education landscape.



Are Students Switching Destinations or Staying Home?

Data suggests that demand for international education remains strong, even as visa restrictions and rising costs in traditional destinations deter some students. Alternative study locations, such as Germany, Malaysia, Singapore, and the Netherlands, are increasingly appealing by offering English-taught programs, lower costs, and more straightforward visa processes.

For ELL providers, this shift creates a ripple effect: if students are choosing these non-English-speaking destinations, will they still need English training? The answer depends on two main factors:

- **English-Medium Programs:** Many universities in non-English-speaking countries now offer English-medium programs. This trend could reduce the need for long-term, immersive ELL programs, as students can pursue studies without achieving full language immersion.
- **Proficiency Requirements & Targeted ELL Demand:** English-medium programs still often require a baseline proficiency level, creating demand for shorter, targeted courses that help students meet language requirements for admission.



Implications for ELL Providers: Winners, Losers & Strategic Shifts

As student mobility trends shift, ELL providers must adapt or risk losing relevance. Here's a breakdown of which types of ELL providers may benefit directly from these changes and which may face challenges.

Winners: ELL Providers Benefiting Directly from Shifts in Student Mobility

- **Hybrid ELL Providers (Online + In-Person):** Companies like EF English First, Kaplan International, Berlitz, and Wall Street English use hybrid models that combine online and in-person learning. This approach reduces reliance on student travel to traditional destinations, allowing them to serve both local and international students with flexible options that adapt to changing mobility trends.
- **Professional and Industry-Specific ELL Programs:** Providers like Voxy, Pearson English Business Solutions, and Berlitz that specialize in business, technical, and healthcare English are well-positioned. With the rise of remote work and career advancement needs, demand for English skills in specific industries is growing, reducing the necessity for full relocation to English-speaking countries.
- **Regional ELL Providers in Emerging Markets:** Positioned in emerging education hubs, providers like British Council in Asia and Europe, ILA Vietnam, and English Time in Turkey are well-positioned to attract students who need English for non-traditional destinations like Germany, Malaysia, and Singapore. These companies benefit as visa restrictions limit access to traditional destinations, driving students to local ELL providers.

Status Quo: Companies Largely Unaffected by Mobility Shifts

Some companies maintain stable demand but aren't directly impacted by shifts in student mobility or visa policy changes.

- **Global Online and Self-Paced ELL Platforms:** Companies like Duolingo, Babbel, Rosetta Stone, and iTalki provide self-paced language learning for global learners. Their demand remains steady but is not driven by student mobility shifts, as their casual models cater to general interest rather than visa or mobility-driven needs.
- **Corporate and Institutional ELL Programs:** Companies like Open English, Berlitz, Rosetta Stone, and Voxy offer corporate training, meeting the growing need for English proficiency among multinational teams. However, this demand is largely independent of student mobility trends and remains driven by remote work needs and professional development.
- **AI-Enhanced and Personalized ELL Platforms:** AI-driven platforms such as Speak, LingoChamp, and Elsa Speak attract students and professionals seeking customized learning experiences. While AI adds value, demand isn't directly influenced by changes in international student mobility.

Losers: ELL Providers Negatively Impacted by Shifts in Student Mobility

Traditional, in-person, and immersion-focused providers reliant on international travel face the greatest challenges in the current landscape.

- **In-Person, Destination-Based ELL Centers:** Language centers that rely on international students traveling to English-speaking countries face enrollment challenges. For example, providers like Rennert and Zoni Language Centers in the U.S., ILAC in Canada, and Greenwich English College in Australia depend on mobility to these regions. Visa restrictions and alternative destinations reduce physical mobility to these traditional locations.
- **Long-Term Immersion Programs in Traditional Markets:** Programs like Intensive English USA, The Language Company, Kaplan Canada, and StudyCELTA, which focus on in-person, immersive programs in traditional destinations, may experience demand declines. As students look for shorter or regional programs, traditional immersion models will need to adapt to stay relevant.
- **Standalone, Local ELL Centers without Digital Adaptation:** Centers with limited digital options, like ELS Language Centers in the U.S., Greenwich College in Canada, and Ability English in Australia, may struggle as student mobility to traditional markets declines. Without robust online offerings, these centers are vulnerable to enrollment losses and may have limited capacity to adapt to remote learning demands.

Can Emerging Destinations Compensate for Reduced Demand in Traditional Markets?

The shift toward emerging destinations doesn't necessarily mean a significant drop in global demand for English skills; instead, it signals a transformation in where and how English is learned. Three key dynamics illustrate this:

English-Medium Programs in Non-English-Speaking Destinations

Countries like Germany, Malaysia, and Singapore have seen growth in English-taught programs, which appeal to students who might have otherwise considered traditional English-speaking countries. These students still need English skills but can fulfill these needs through shorter, targeted courses.

Localized ELL Demand in Emerging Markets

Non-traditional destinations often have local ELL providers catering to students preparing for English-medium programs. Providers like the British Council in Asia and Europe may experience rising demand as students seek preparatory English programs close to home.

Continued Need for English in Professional Sectors:

English remains essential for career growth in international industries, even if fewer students relocate to traditional English-speaking countries. This opens opportunities for ELL providers to serve adult learners and professionals needing English for career advancement, regardless of location.

Strategic Recommendations for ELL Providers

To remain competitive amid changing international education trends, ELL providers must adopt adaptive strategies that meet the evolving needs of their audiences. Key recommendations include:



Expand Digital and Hybrid Learning Options

Building robust online and hybrid offerings allows providers to serve a global student base without relying on physical presence. By offering flexible, interactive learning modules, ELL providers can attract students who may no longer need to relocate for language training.



Offer Shorter, Targeted Programs

As more students choose emerging destinations, demand for traditional immersion programs is waning. ELL providers should consider developing shorter courses focused on specific language skills or proficiency milestones, aligning with students' needs in English-medium programs worldwide.



Specialize in Professional English Programs

Industry-specific English skills are in high demand among professionals, particularly in sectors like business, healthcare, and technology. ELL providers who tailor programs to meet these needs will find growing opportunities among career-focused learners.



Form Corporate and University Partnerships

Partnerships with universities in non-traditional destinations can provide ELL providers with a steady stream of students needing English for academic purposes. Corporate partnerships offer additional revenue streams as businesses seek English training for their international teams.

Conclusion: A New Era for ELL Providers

The global shift in student mobility doesn't spell the end for ELL providers; rather, it signals a transformation in how English language skills are acquired and where students choose to learn. As visa restrictions persist and new education hubs emerge, ELL providers must adapt to a more distributed, diverse market. Providers with digital capabilities, flexible learning structures, and a focus on niche or professional English skills will thrive in this evolving landscape.

While providers in traditional destinations reliant on in-person attendance may face challenges, those that pivot to meet new market demands—by embracing digital platforms, developing specialized programs, and forming strategic partnerships—will continue to play a critical role in the global ELL industry. By adjusting to these shifts, ELL providers can secure their place in an increasingly interconnected world.

Winners: Companies Benefitting from Shifts in Student Mobility

Category	Company Examples	Reason for Impact
Hybrid ELL Providers (Online + In-Person)	<ul style="list-style-type: none"> • EF English First • Kaplan International • Berlitz • Wall Street English 	Hybrid models reduce reliance on travel to traditional destinations; they can serve both local and international students via blended learning, adapting to changing mobility trends.
Professional & Industry-Specific ELL-Programs	<ul style="list-style-type: none"> • Voxy • Pearson English Business Solutions • Berlitz • Target Training GmbH 	Demand for English skills in business, technical, and healthcare sectors grows as professionals seek remote work or career advancement, reducing the need for relocation to English-speaking countries.
Regional ELL Providers in Emerging Markets	<ul style="list-style-type: none"> • British Council (Asia & Europe) • ILA Vietnam • English Time (Turkey) • Engoo (Japan) 	Positioned in emerging education hubs, these providers attract students aiming to meet English requirements for programs in non-traditional destinations like Germany, Malaysia, and Singapore.

Status Quo: Companies Largely Unaffected by Mobility Shifts

Category	Company Examples	Reason for Impact
Global Online & Self-Paced ELL Platforms	<ul style="list-style-type: none"> • Duolingo • Babbel • Rosetta Stone • iTalki • HelloTalk • Memrise • Mango Languages • Drops 	These companies maintain stable demand among global learners but are not directly impacted by student mobility or visa policy changes due to their casual, self-paced models.
Corporate & Institutional ELL Programs	<ul style="list-style-type: none"> • Open English • Berlitz • Rosetta Stone • Voxy 	Companies with corporate training options see steady demand for professional English skills, largely unaffected by changes in student mobility patterns.
AI-Enhanced & Personalized ELL Platforms	<ul style="list-style-type: none"> • Speak • LingoChamp • Elsa Speak 	AI-driven, personalized learning attracts global students and professionals seeking customized learning, but growth is not directly tied to international student mobility.

Losers: Companies Negatively Impacted by Student Mobility Shifts

Category	Company Examples	Reason for Impact
In-Person, Destination-Based ELL Centers	<ul style="list-style-type: none"> Local schools in U.S. (Rennert, Zoni Language Centers), Canada (ILAC) Australia (Greenwich English College) 	Heavily reliant on international travel, these schools face enrollment challenges as visa restrictions and new destination options reduce physical mobility to traditional English-speaking countries.
Long-Term Immersion Programs in Traditional Markets	<ul style="list-style-type: none"> Intensive English USA The Language Company Kaplan Canada Navitas StudyCELTA 	Programs relying on immersive, in-person attendance in traditional markets may see a drop in demand as students look for shorter, flexible programs in other countries or online.
Standalone, Local ELL Centers without Digital Adaptation	<ul style="list-style-type: none"> Local centers in U.S. and Canada (ELS Language Centers, Greenwich College) Australia (Ability English) 	Providers without robust online options are vulnerable to declining enrollments as international student mobility to traditional markets drops, limiting their ability to pivot and serve remote learners.