

# English Australia Fact Sheet

## Global Language Travel



### Background

The only source of data that compares the performance of destination countries for English language training is *Study Travel Magazine*, a publication of *Hothouse Media* (based in the UK). Every year the publication researches a report which attempts to assess the global picture for English Language Teaching exports. The latest report is for **2012** (with 2013 information not becoming available until December 2014).

The motivations for travelling overseas to learn English are many and varied. English language students may want to continue studying at an English medium high school, vocational college or university; travel or work in an English speaking country; gain a qualification that gives them entry to improved work or study options at home or better access to cultures where English is the lingua franca.

### Global Language Travel in 2012

An estimated **1,497,276** international students travelled to an English speaking country to learn English in 2012, a decrease of **-1.7%** compared with the 1,523,642 who studied in 2011. Global ELT student numbers peaked in 2011 and despite the small decline in 2012 remain close to the highest levels recorded by this annual analysis

The number of weeks studied shows an even smaller decline of only **-0.1%** in 2012, from 11,723,476 to **11,713,835**. English language travel generated expenditure of over **US\$11.5 billion** in 2012.

#### 2012 – Average course length (weeks)

As a “long-haul” destination, Australia comes in 2<sup>nd</sup> place when average course length is compared. This longer average course length combines with consistent numbers throughout the year (no real peaks/troughs) to give a degree of stability to the industry in Australia. Whilst the UK may seem to dominate with their 47% share of students, the longer average course length for other destinations such as the USA, Australia and Canada increases their market share when it comes to weeks.

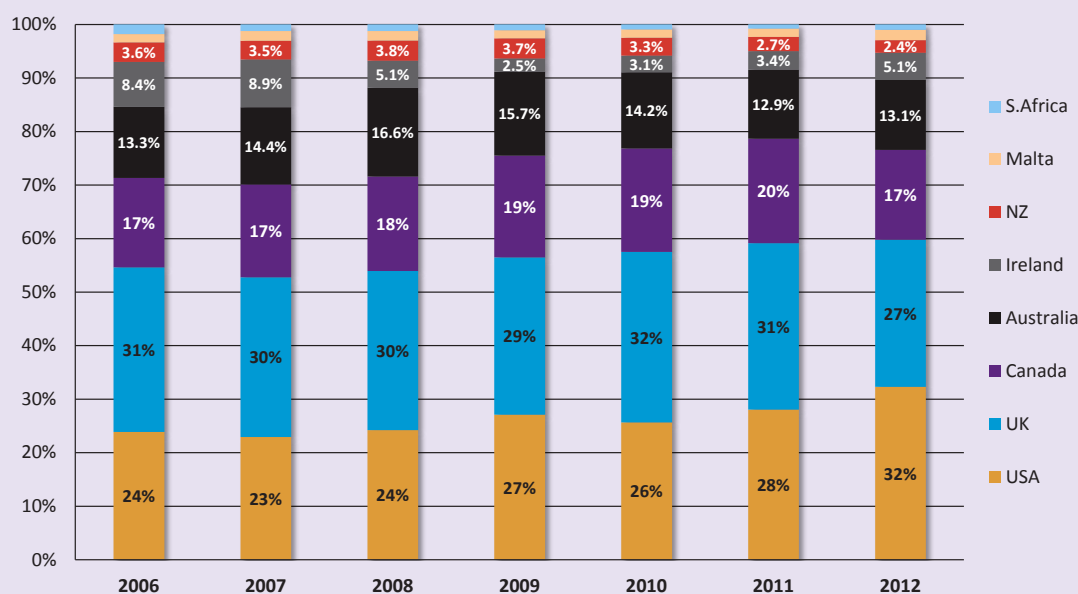
	2007	2008	2009	2010	2011	2012
USA	12.2	12.6	12.8	14.2	14.0	15.0
Australia	12.1	12.4	12.6	11.9	11.2	12.3
Canada	8.2	10.4	12.3	11.9	12.3	11.7
NZ	10.1	12.4	11.1	9.5	8.0	8.0
S.Africa	8.1	6.7	6.5	6.7	5.9	6.8
Ireland	7.6	5.3	3.3	3.8	4.0	5.1
UK	5.3	5.6	5.9	5.7	4.9	4.6
Malta	2.4	2.6	2.5	2.5	2.6	2.8
Average	7.6	8.1	8.5	8.2	7.7	7.8

#### 2012 – Market share of student weeks

The USA has overtaken the UK to record the greatest market share in relation to the number of student weeks. **Australia is in fourth place** after the USA, UK and Canada. The USA, Australia, Ireland, Malta and S. Africa gained market share in 2012 at the expense of the UK, Canada and New Zealand.

The five years to 2008 saw **Australia** increasing its share of the global market from 8.8% in 2003 to a peak of 16.6% of student weeks in 2008; however this share has declined over the last four years, sitting at **13.1% in 2012** – a return to 2006 levels.

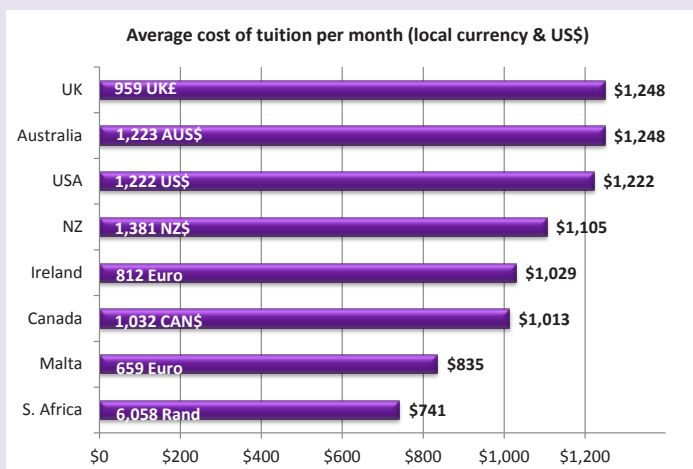
The top 4 countries receive 90% of student weeks, with the share of the other 4 destinations minor in comparison.



A strong regulatory framework, attractive lifestyle, quality schools and the ability to work on both student and working holiday visas are primary reasons for Australia's ongoing appeal as one of the top 4 destinations for English language study. "Australia has established a very strong niche in the market and has a clear identity in terms of the educational product and opportunities offered to international students," affirms Sue Blundell, Executive Director of English Australia, who says, "the Australian profile is based on nationally consistent quality standards, strong consumer protection mechanisms, a rewarding lifestyle and natural environment and a culture that allows learners to grow and explore within the learning environment."

### 2012 – Average cost of tuition per month

Currency fluctuations and pricing strategies contribute to strong variations in the affordability of English language study across the various destination options. The most popular destination is still the UK, which continues to be the most expensive destination. Australia now ranks equal first in terms of cost of tuition in US\$, however continues to offer quality English training at a competitive price.



## Further Information

English Australia provides data regarding the Australian English language industry to *Study Travel Magazine* each year as part of *Study Travel Magazine's* research into developing an annual report on global language travel trends.

The data for Australia is available in more detail in another Fact Sheet on the English Australia website at <http://www.englishaustralia.com.au/our-industry>.

The annual global market report is published in the December issue of *Study Travel Magazine* and can be viewed online at [www.hothousemedia.com](http://www.hothousemedia.com).