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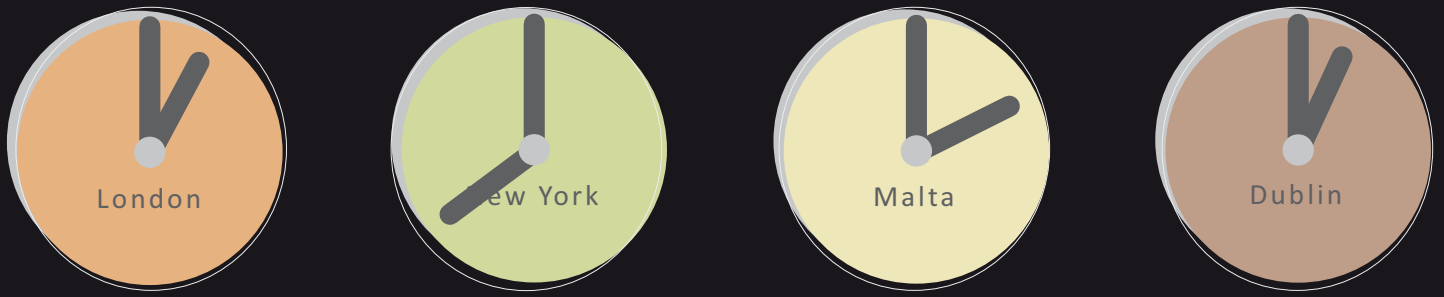
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In a multi-million dollar industry such as English language training, it is useful to know how each school and each country fits into the bigger picture. AMY BAKER reports on market share in the global English language teaching industries in native English speaking countries.

# The bigger picture



There are many different ways to read success in the English language teaching market. At first glance, the UK seems to be the most successful country, with a clear majority of students choosing to study in the UK – almost half, in fact, if we consider student enrolments (see fig.1). However, the better measurement of performance is considered to be student weeks, which captures total number of enrollees within a market as well as their combined length of stay within a country. In this case, the UK loses market share to the USA and Australia most markedly, as these countries clearly attract longer-term students (see fig.2).

All student traffic is converted into revenue at the end of the day and, as currencies rise and fall in value against each other, income is also a more flexible figure. However, in this 2007 report, market share by revenue sees the UK slightly regain its stature, earning one-third of the total revenue

generated by English language training in native countries, globally. The total revenue generated is an impressive US\$10 billion, up from close to US\$9 billion in 2006 (see LTM, November 2007, pages 34-38).

Another interesting statistic to observe within global performance indicators is business growth within an individual country, year on year (see fig.8). In this respect, Australia has performed well, with 24.6 per cent growth in student weeks year on year, but Malta is in the lead, with an impressive 34 per cent rise in student weeks taught in one year.

#### Individual success stories

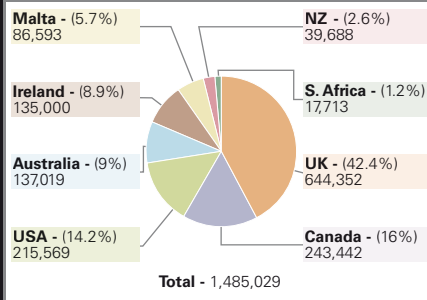
One reason for this growth in Malta was the decision by huge numbers of Spanish students on the newly available scholarships to study on this Mediterranean island last year. With host families and residences full, there were reports of hotels overcrowded with students and capacity problems.

Since then, the country's small yet motivated ELT industry, spearheaded by its association, Feltom, has adapted and put provisions in place to cope with continued high demand, as the late surge of Spanish students took many by surprise in 2007. With a best-ever year under their belts, however, Andrew Mangion, President of Feltom, testifies that growth may be limited to the off-peak season in the future.

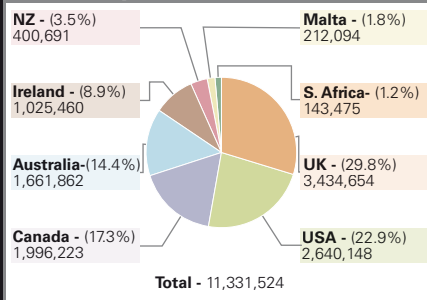
"While I still think that there is market upside to be had in Malta, market growth will come during the low season and shoulder months from long-term students in Asia, South America and the Middle East," he predicts, saying he expects less market growth during the summer season "due to the current and foreseeable lack of resources, unless of course there is some major increase in resources". He adds that he expects some consolidation, "with some smaller players pulling out and others possibly being acquired by local and/or foreign entities".



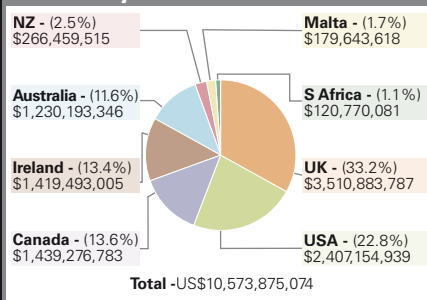
### 1. Global English language market by student numbers 2007



### 2. Global English language market by student weeks 2007



### 3. Global English language market by revenue 2007



As Mangion observes, costs in Malta will certainly go up too, given that the country is now in the eurozone, sharing a currency with Ireland. Nevertheless, "Malta will continue to remain price competitive vis-a-vis the UK and Ireland and the quality of its offerings will only get stronger," states Mangion.

#### Relative costs

Because of the rise in value of the euro, Ireland, too, had a good year in 2007 in terms of revenue earned – almost rivalling Canada in dollar turnover. A growth in average length of stay, rather than a major increase in actual student intake, was the reason behind its 22 per cent hike in students by volume, which enhanced its earnings significantly.

The rise in value of the euro, however, also means that in dollar terms, Ireland is getting more expensive. In fact, Ireland beat the UK to win the accolade of most expensive destination. From an average spend per week of US\$938 in 2006, the increase year on year was US\$446 in Ireland; a significant jump to US\$1,384 (this includes tuition, accommodation, leisure, food and all extras). Meanwhile, the average spend per week in the UK – based on the same figures produced by our Status surveys for all countries – had in fact declined very marginally year on year, from US\$1,099

*"The rise in value of the euro, however, also means that in dollar terms, Ireland is getting more expensive"*

to US\$1,080. This change indicates recent currency fluctuations as the value of the UK pound has declined while the value of the euro has increased.

Nevertheless, in Ireland, there is optimism about further business growth, especially with government attention benefiting the industry – the new Education Ireland brand should launch next year (see LTM, October 2007, page 6). Fionnán Nestor, Product Development Officer for English Language Learning at Failte Ireland (the Irish Tourist Board), relates, "Anecdotally, major traditional players and the larger institutions, particularly in urban centres like Dublin, Cork and Galway, are reporting that 2008 is performing above the levels expected in light of a global downturn in international travel." She adds, "Demand for English language training among international students coming to study at higher education institutions has also continued to rise."

#### Global feel-good factor

There seems to be all-round optimism from English language teaching countries, including Canada, which posted the next-best increase in student weeks, year on year. Like Ireland, Canada has a new cohesive body that markets learning English and French in Canada to a global audience: Languages Canada.

Calum MacKechnie, President of the association, says he thinks the next few years look very, very promising. "Canada has been relatively slow to get into the market and as a result, we are at a less mature stage in our development than some of the major players,"

he relates. "Only now is Canada beginning to get over its fragmentation problems and to get itself organised." He goes further: "The country is a sleeping giant, with vast untapped educational resources, that is now beginning to wake up and assert itself."

Canada's neighbour is also its rival for English language students, and the USA had also suffered from "fragmentation" problems, for want of a better word. With no government body promoting international education and a number of educator associations, there was much grass-roots activity but little hierarchical impact. That, too, has changed, with a new bill making its way through US congress that supports a new visa for short-term study, and a coalition of associations working closely with lobbyists, "who in turn work constantly with key legislators critical to international education exchange", recounts May Arthur, President-Elect of the American Association of Intensive English Programs (AAIEP).

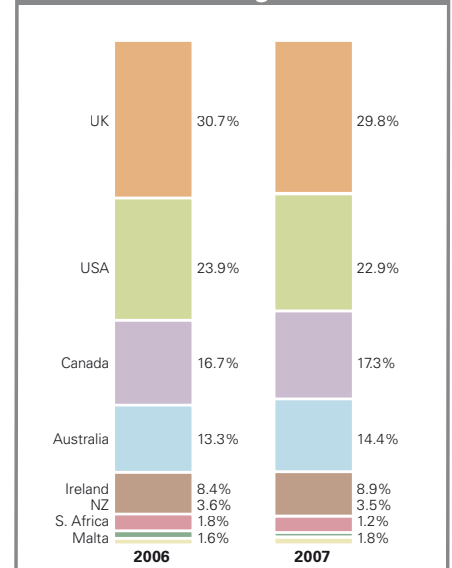
Gordon Clark, Immediate Past President of AAIEP, adds, "We see tremendous potential and significant growth", and he says that there is hope that the new US president and administration will be much more globally minded. Presidential candidates sent foreign

policy advisors to meet with industry members at a recent conference on international education.

In Brazil,

Tereza Fulfaro of large agency chain, Central de Intercambio (CI), backs up Clark's prognosis. "The USA will recover its market share," she asserts. "This is already showing, as consulates are speeding up

### 4. Changes in market share by student weeks taught, 2006-2007



student visa processing and being more open to students in general.”

### Going up down under

Elsewhere, Australia does seem to be at the top of its game at the moment, and with recently revised assessment levels for 43 countries (34 of which were favourable), it will now be easier for more students to consider applying to study in the country.

Of the 43 nations that had rules amended, 23 – including Brazil, Korea, the Philippines, South Africa and Thailand – will have their assessment level reduced to 1 for a number of education sectors. According to the immigration department, “This will enable these applicants to join the growing number of students applying for their initial student visa online using the eVisa facility.” In 2007-2008, more than 85 per cent of eligible students applying for their student visa from outside Australia chose to apply for a student eVisa.

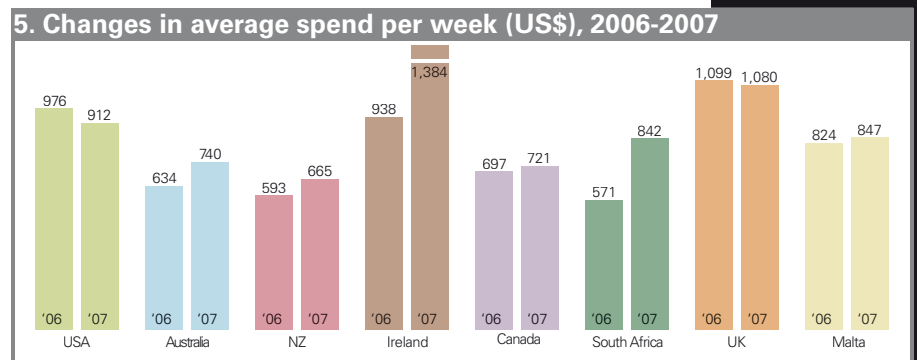
Sue Blundell at English Australia underlines the strong migration need that has aided the industry and which explains, in part, the government’s enthusiasm for streamlining access for students: “One of the primary drivers at the moment is

Australia’s need for skilled migrants,” she says. “The Australian government has developed transparent pathways for international students to transition into migrant programs and English language skills are a very important part of this transition.”

A strong regulatory framework, attractive lifestyle, quality schools and the ability to work part-time for students (a de facto part of a student visa since this year) are other reasons for Australia’s growing appeal. “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 Blundell, 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.”

### Capacity for growth

The UK also posted double-digit growth in 2007 and Tony Millns, >>>



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## Malta as star performer by population size

There are many ways to rate the success of a country's English language teaching industry, and market size by numbers or weeks taught is just one way. When you compare the size of New Zealand to the UK, for example, it is not a like-for-like comparison of market potential, given New Zealand's smaller size and population.

When total English language student numbers taught in a country are compared with a country's population, you have an idea of how much of an impact the ELT industry has. In this new rating, Malta is streets ahead of its competitors, with its ELT populace representing the equivalent of an astonishing 21.4 per cent of the native Maltese population!

Next up would be Ireland, which has a relatively significant student population compared with its demographic profile. Its 3.2 per cent rating for ELT population as proportionate to populace is the second-best by far, indicating Ireland is punching above its weight and doing well. Next up is in fact the UK, given its much larger student population compared with all other rivals. (The UK, like Ireland, benefits from having the important Western European source market so close by).

Then New Zealand, the USA and Canada, followed by Australia and finally South Africa, which in all league tables is definitely the baby of the bunch – although with big ambition!

### Malta

Population: 403,532  
ELT intake 2007: 86,593  
ELT population as proportion of whole: 21.4%

### Ireland

Population: 4,156,119  
ELT intake 2007: 135,000  
ELT population as proportion of whole: 3.2%

### UK

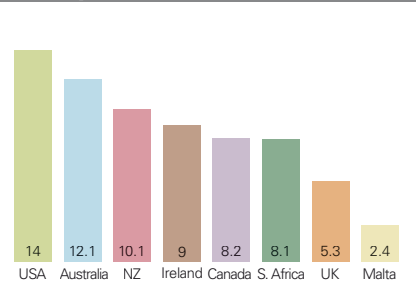
Population: 60,943,912  
ELT intake: 644,352  
ELT population as proportion of whole: 1%

Chief Executive at English UK, is also buoyant about the outlook for the future. He points out that the weak pound currently makes the UK more attractive on price, and the rising cost of aviation may be a disadvantage to Australia and New Zealand for those who consider them long-haul locations. A new visa system coming into effect next year should also help: student visas will be guaranteed for those who meet the entry criteria, which is confirmation of enrolment from an accredited school and proof of sufficient funds.

"The UK has over 400 accredited English language centres, so we have significant capacity," he adds. "Some competitor destinations such as Ireland and Malta have much less capacity, and even Australia is finding teacher recruitment difficult recently."

If we assess the performance of each English language teaching country by capacity (assuming populace as a standard measure of capacity) then Malta is by far the best performer, per capita – or the most stretched – with English language students equivalent to an incredible 21.4 per cent of the population (see box above).

### 6. Average length of stay per country, 2007



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**New Zealand**

Population: 4,173,460  
 ELT intake 2007: 39,688  
 ELT population as proportion of whole: 0.9%

**USA**

Population: 303,824,646  
 ELT intake 2007: 215,569  
 ELT population as proportion of whole: 0.7%

**Canada**

Population: 33,212,696  
 ELT intake 2007: 243,442  
 ELT population as proportion of whole: 0.7%

**Australia**

Population: 20,600,856  
 ELT intake 2007: 137,019  
 ELT population as proportion of whole: 0.6%

**South Africa**

Population: 43,786,115  
 ELT intake 2007: 17,713  
 ELT population as proportion of whole: 0.04%

*Data source: CIA World Factbook, July 2008 est.*

It is South Africa that has the most potential to grow its industry. At present, most of the ELT schools in the country are located in Cape Town, with a few schools dotted around in other locations. In comparable terms, South Africa is a tiny destination, accounting for 1.2 per cent of the market by student weeks. However, with larger players such as EF and EC having opened a branch in the country, it is increasingly "on the map" as an English language learning destination.

Gavin Eyre, spokesperson for school association, Eltasa, says, "We envisage that over the next five years, as South Africa grows within the world travel markets, the ELT business goes from strength to

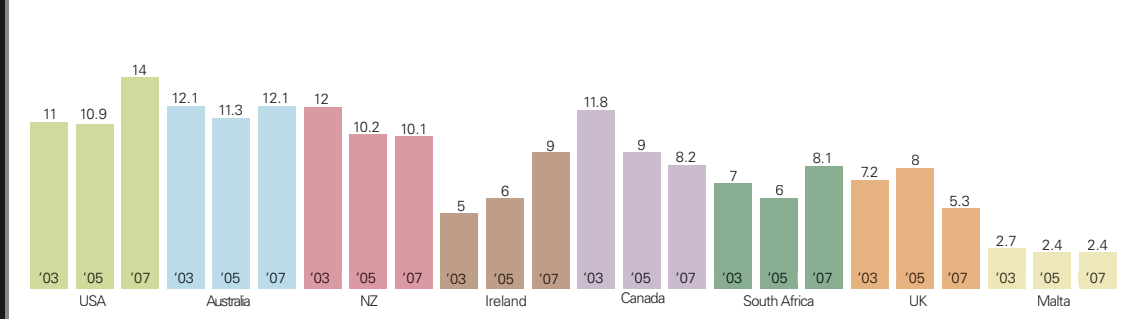
strength." He says he expects more larger chains to open up in the future, and adds, "Of course the 2010 Fifa World Cup has also given South Africa a huge marketing boost."

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**7. Average length of stay per country, 2003, 2005, 2007**



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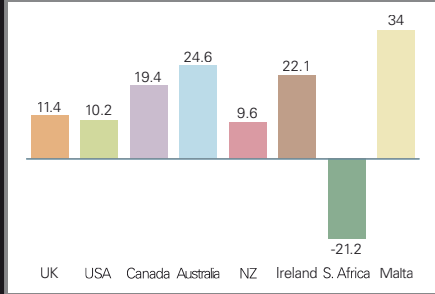
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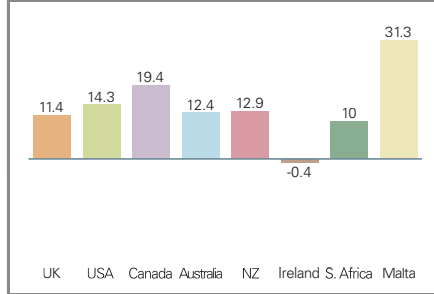
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**8. Percentage growth figures by student weeks, 2006-2007**



**9. Percentage growth figures by student numbers, 2006-2007**



news story among the main ELT destinations is New Zealand, which had certainly suffered from lacklustre enrolments for a few years since its peak of 2003. In 2007, there was a 9.6 per cent rise in student weeks. This is contrasted with a static result in 2006 on 2005, and an actual decline in student numbers in the same period of two per cent. Instead, student numbers also picked up by 12.9 per cent in 2007.

"I see a good future as our schools build on their strengths and keep a diverse range of students coming," says Stuart Boag of Education New Zealand, who points out that the New Zealand government is working to ameliorate immigration rules for students. Saudi Arabian students, many on scholarships, were the biggest reason for New Zealand's return to form, with their investment in New Zealand education up by 68 per cent to the year ending March 2008.

"We have seen significant increases in student flows from areas such as the Middle East and South

America, and new interest from regions such as Central Asia," comments Boag. "More mature markets in Asia and Europe are also continuing to support New Zealand. Schools continue to develop their programmes to meet the particular needs of markets whether they be geographic or based around special requirements from foundation programmes through to special interest groups."

Boag makes an interesting point about where the country's competition lies. Australia is its neighbour and closest rival, but, he says, "the biggest competition will come from non-English speaking countries that are ramping up their own abilities to teach English, either to their own nationals or to international students." With India, Singapore and Malaysia all positioning themselves as English tuition destinations, there is significant competition from Asian destinations.

"There is always a big advantage in learning English in a country that speaks it, but as English becomes more widespread as a 'first choice second language' there will be many alternatives to the traditional providers," says Boag. Nevertheless, right now, the outlook and recent performance of the main ELT destinations has been an impressive tour de force.

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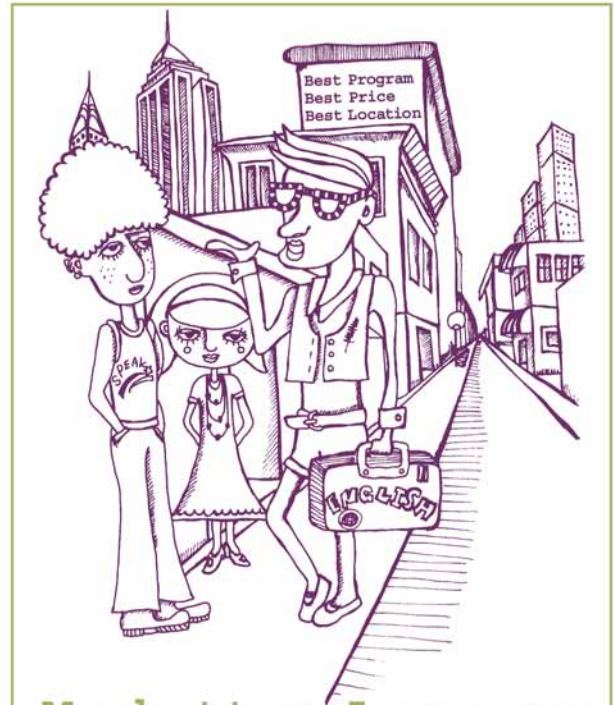
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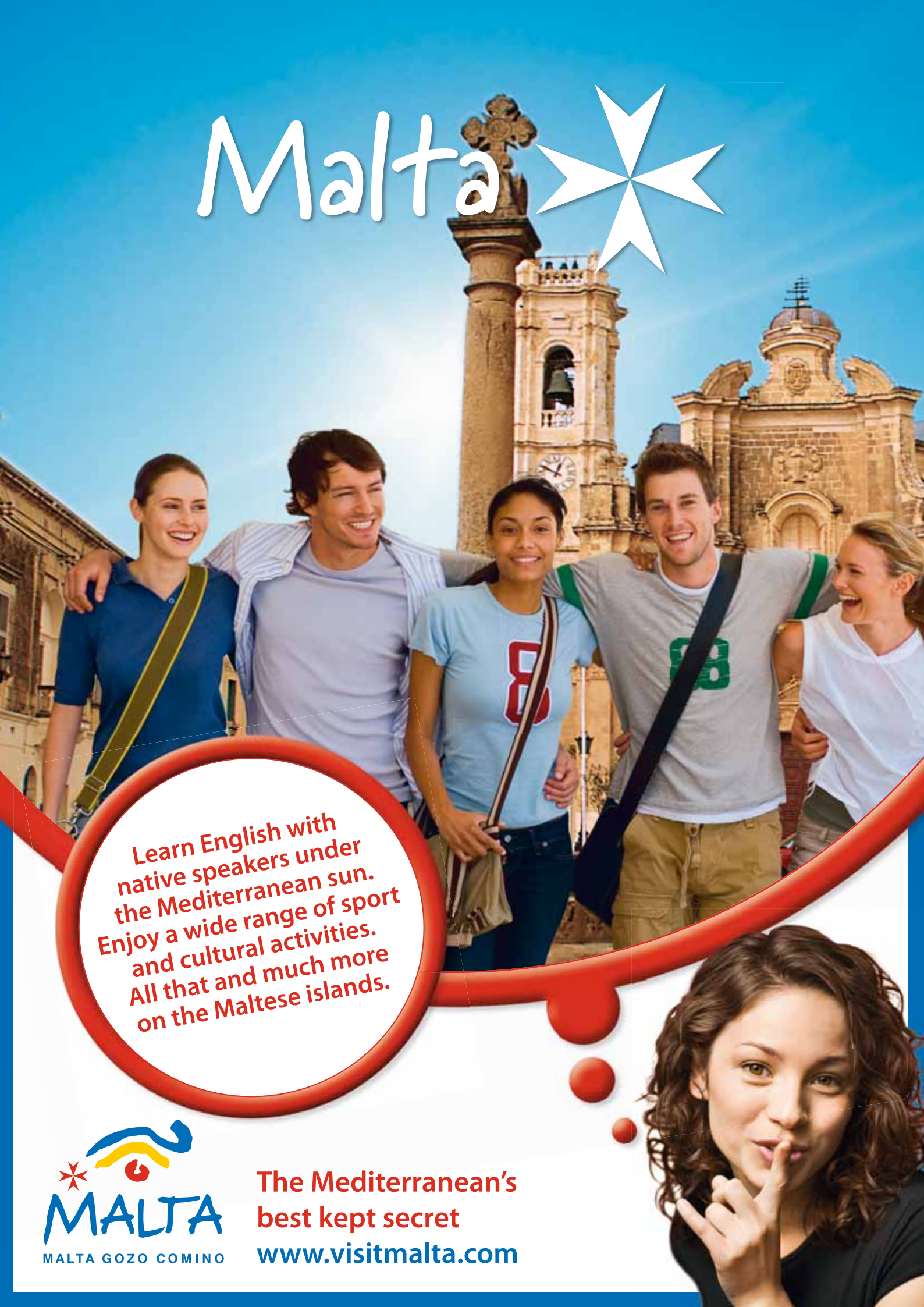
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