

How big is the global ELT market?
Insights from *StudyTravel Magazine*

Languages Canada Conference, Toronto
21st February 2018

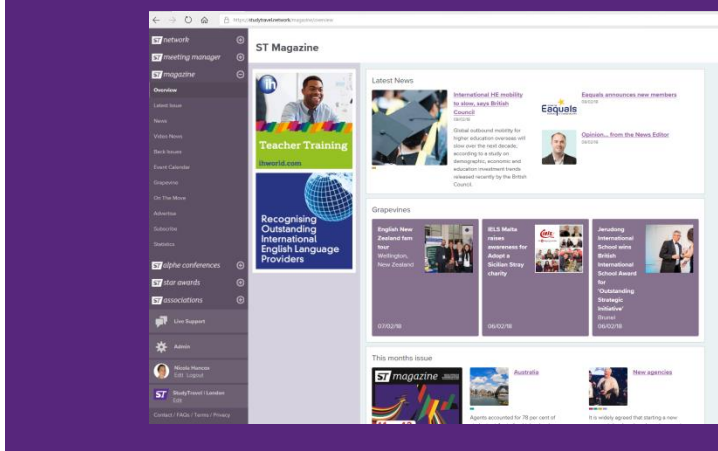


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what was the global value of the ELT industry (in US\$) in 2016?

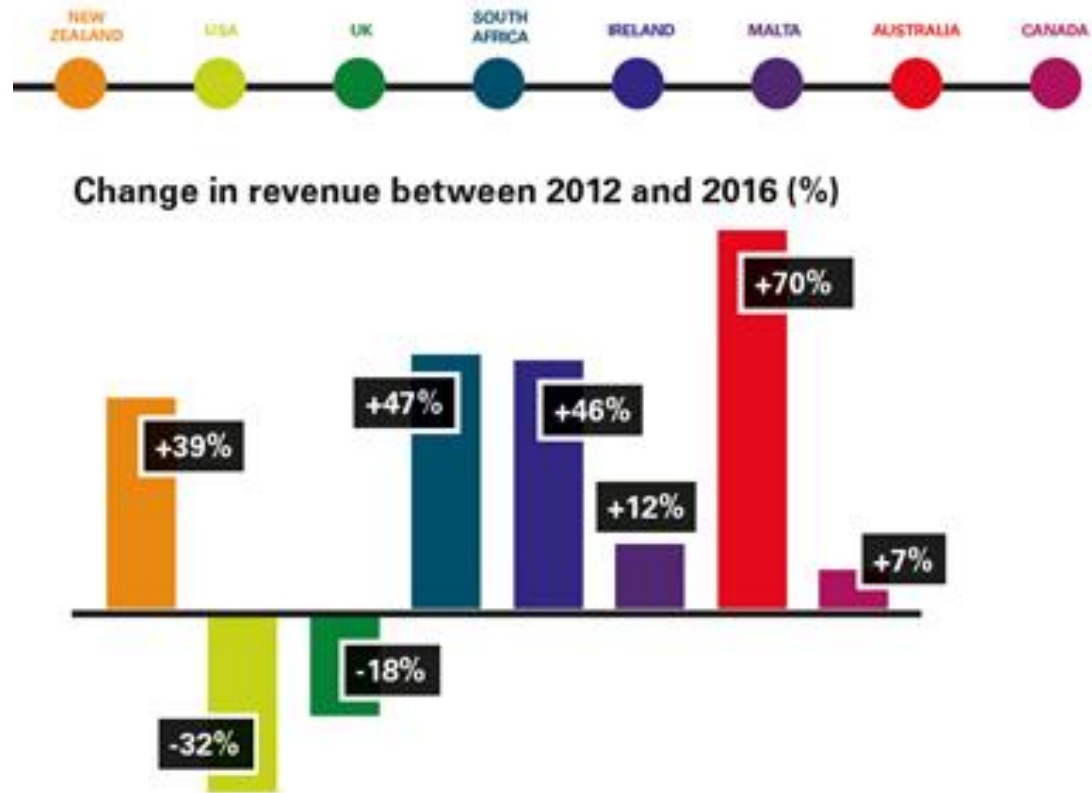
A:

US\$9,327,524,194



How has this changed over the last five years (2012-16)?

A:





Which ELT destination generated the most revenue in 2016?

A:

Global English language travel market by revenue 2016 (US\$)

Total: \$9,327,524,195



UK	\$2,750,038,797	(29%)
USA	\$2,580,476,304	(28%)
Australia	\$1,810,116,088	(19.5%)
Canada	\$1,164,121,420	(12.5%)
Ireland	\$536,940,950	(6%)
New Zealand	\$242,174,828	(2.5%)
Malta	\$183,547,508	(2%)
South Africa	\$60,108,300	(0.5%)



Which ELT destination had the most students in 2016?

A:

Global English language travel market by student numbers 2016

Total: 1,381,809



UK	635,893 (46%)
Australia	173,506 (13%)
USA	169,221 (12%)
Canada	154,270 (11%)
Ireland	122,803 (9%)
Malta	76,730 (5.5%)
New Zealand	34,886 (2.5%)
South Africa	14,500 (1%)



what about student weeks?

A:

Global English language travel market by student weeks 2016

Total: 10,111,841



UK	2,384,599	(24%)
USA	2,386,016	(24%)
Australia	2,319,175	(23%)
Canada	1,727,824	(17%)
Ireland	645,944	(6%)
New Zealand	327,928	(3%)
Malta	229,005	(2%)
South Africa	91,350	(1%)

AUSTRALIA



Student numbers: **173,506**
Change from 2015: **+1.6%**
Total student weeks: **2,319,175**
Change from 2015: **+10%**
Average stay: **13.4 weeks**
Share of agent recruitment: **86%**



IRELAND



Student numbers: **122,803**
Change from 2015: **+7.8%**
Total student weeks: **645,944**
Change from 2015: **-7.5%**
Average stay: **5.3 weeks**
Share of agent recruitment: **60%**



CANADA



Student numbers: **154,270**
Change from 2015: **+4.2%**
Total student weeks: **1,727,824**
Change from 2015: **-2%**
Average stay: **11.2 weeks**
Share of agent recruitment: **61%**



USA



Student numbers: **169,221**
Change from 2015: **-19%**
Total student weeks: **2,386,016**
Change from 2015: **-23.5%**
Average stay: **14.1 weeks**
Share of agent recruitment: **36%**



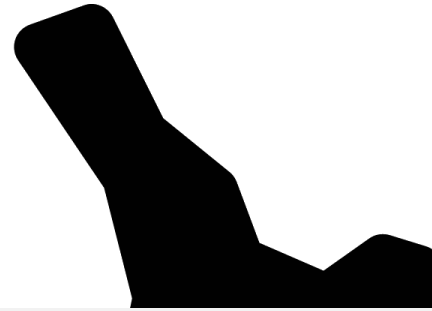
SOUTH AFRICA



Student numbers: **14,500**
Change from 2015: **+18.6%**
Total student weeks: **91,350**
Change from 2015: **+20.5%**
Average stay: **6.3 weeks**
Share of agent recruitment: **41%**



NEW ZEALAND



Student numbers: **34,866**
Change from 2015: **+12%**
Total student weeks: **327,928**
Change from 2015: **+12%**
Average stay: **9.4 weeks**
Share of agent recruitment: **81.5%**



MALTA



Student numbers: **76,730**
Change from 2015: **+1.6%**
Total student weeks: **229,005**
Change from 2015: **-4%**
Average stay: **3 weeks**
Share of agent recruitment: **71%**



UK



Student numbers: 635,893
Change from 2015: -11%
Total student weeks: 2,384,599
Change from 2015: -13%
Average stay: 3.8 weeks
Share of agent recruitment: 60%



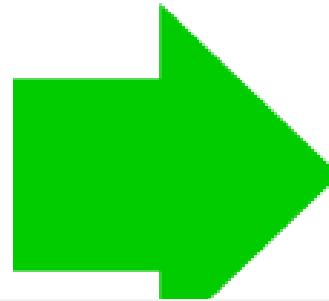
Global Market 2017...?



AUSTRALIA



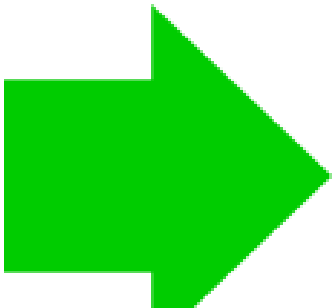
CANADA



IRELAND



MALTA



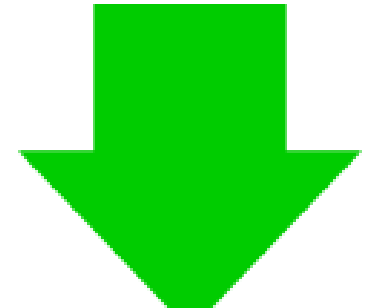
NEW ZEALAND



SOUTH AFRICA



UK



USA

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Thank you for listening!

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