



International Association  
of Language Centres

# Trends in the Demand for Foreign Languages

IALC Study Travel Research Report 2016 – Administered by

**studentmarketing**  
YOUTH TRAVEL CONSULTANCY



## TRENDS IN THE DEMAND FOR FOREIGN LANGUAGES

Copyright © 2016 International Association of Language Centres

Supported by:



GALWAY CULTURAL INSTITUTE



Prepared on behalf of:



International Association  
of Language Centres

International Association of Language Centres  
Lombard House, 12/17 Upper Bridge Street, Canterbury, Kent, CT1 2NF, UK | + 44 1227 769007  
[www.ialc.org](http://www.ialc.org) | [info@ialc.org](mailto:info@ialc.org)

Prepared by:

**studentmarketing**  
YOUTH TRAVEL CONSULTANCY

StudentMarketing Ltd.  
Herrengasse 1-3, 1010 Vienna, Austria | +43 650 612 4527  
[www.student-market.com](http://www.student-market.com) | [research@student-market.com](mailto:research@student-market.com)

# TABLE OF CONTENTS

---

<b>INTRODUCTION</b> .....	4
<b>METHODOLOGY</b> .....	5
<b>EXECUTIVE SUMMARY</b> .....	6
<b>CHAPTER 1: Language speakers around the world</b> .....	8
Language test participation rates	10
Global language travel market	12
<b>CHAPTER 2: Trends in language learning abroad</b> .....	14
Overall demand levels	17
Trends in demand levels	22
Reasons for learning a language abroad	25
Age group specifics	27
Provider-agent partnership	30
<b>CHAPTER 3: Trends in domestic language learning</b> .....	32
<b>CONCLUSIONS</b> .....	36

# INTRODUCTION

Foreign language teaching has become an integral part of the 21st century's life-long learning process, with billions now learning a foreign language: 0.25% of them travelling abroad to learn in a local, native environment.

Yet little is actually known about students' reasons for learning a particular language abroad or the overall demand for language courses and the effects of emerging market shifts.

This stems primarily from a lack of documentation on certain languages (and their learning abroad), with the availability of data varying considerably by language.

Just a handful of languages are measured by government-run agencies and national statistical offices – English and Japanese for example (English language travel students as measured by NSO Malta, or Japanese language students by JASSO in Japan) – or by national associations aligning language centres (e.g. English UK, English Australia, Languages Canada, FEDELE, etc.). Others lack comprehensive and regular measurement for analysis purposes (e.g. Italian, Portuguese and Russian).

Prompted by the existing information gap in demand for foreign languages and building on previous research, the International Association of Language Centres (IALC) partnered with StudentMarketing, an independent market intelligence specialist and a UNWTO Affiliate Member and ESOMAR individual member, to contribute to improving language travel documentation and data.

The purpose of this research project is to analyse and compare 9 major foreign languages: Chinese, English, French, German, Italian, Japanese, Portuguese, Russian, and Spanish. The study aims to shed more light on current and future demand levels, drivers and age group breakdowns for each of the languages, resulting in an unprecedented benchmarking of each of them.

This research also strives to overcome an existing barrier to comparative analysis by implementing a primary research component – through surveying education agents, who represent the leading booking channel in English language travel, and an important booking channel for other foreign languages. Only by undertaking this exercise can a trustworthy global comparison be drawn.

As a result, 466 agents from 74 countries took part in the research project and indirectly expressed the preferences of more than 236,000 language travel students (representing 10.4% of global language travel market).

IALC and StudentMarketing would like to take this opportunity to express their gratitude to all participating agents for their vital contribution.



# METHODOLOGY

---

This study is the outcome of a combination of primary and secondary research conducted from August 2015 to mid-March 2016.

## **Secondary research**

The project was initiated by desk research, drawing on more than 60 separate resources through screening and evaluation of both international and national sources of information. The most prominent and frequently used include national statistical offices, reports by Ministries of Education and Foreign Affairs, the Ethnologue, as well as existing studies on language demand by respected organisations in the industry. Scholarly articles from various fields, including economics and psychology, were also used to conduct a comprehensive study of the demand for foreign languages.

## **Primary quantitative research**

Quantitative research was undertaken in the form of a B2B global survey, with results collated from 466 education agents headquartered in 74 countries. Agents of different sizes, types and locations were surveyed to achieve a true representation of the research sample, thus creating an accurate picture of the current state of the language travel industry. Unless stated otherwise, data from primary research refers to 2015.

Both IALC and non-IALC affiliated agents were included in the research sample, with the latter occupying a larger share of the sample. The response rate and representativeness of the sample was further boosted by targeted calling of agents.

## **Primary qualitative research**

In addition to the global survey, in-depth interviews were conducted with 21 renowned education agents in the language travel industry. These were used to obtain first-hand experience and observations on the demand for major foreign languages. Agents from Argentina, Brazil, Colombia, Czech Republic, Germany, Turkey, Italy, Japan, Russia, Saudi Arabia and Switzerland shared their insights.

All research was conducted in compliance with the ICC/ESOMAR Code and ESOMAR World Research Guidelines.



International Association  
of Language Centres

# EXECUTIVE SUMMARY

This report analyses the demand for foreign languages worldwide, as reported by multiple sources, stakeholders, education agents and, indirectly, by their customers.

The main objective was to provide a snapshot of the current market size and characteristics of the language travel industry (language training abroad), as well as to outline future trends in the demand for foreign languages and how these will influence business practices of language schools, education agents and other stakeholders.

For this particular purpose, initial usage of secondary resources was complemented with global quantitative and qualitative B2B primary research into 9 major foreign languages (Chinese, English, French, German, Italian, Japanese, Portuguese, Russian, and Spanish). This approach enabled a previously unavailable comparison of foreign languages.

The study draws on insights provided by 60 secondary sources, 466 responding agents representing 74 different countries, as well as 21 in-depth interviews with reputable agent representatives. Surveyed education agents represent a total pool of more than 236,000 language travel students worldwide.

## Among the key findings are:

### Global language travel is a sizeable market

- In total, it caters to 2.28 million language students abroad per annum;
- This represents 0.25% of all second language learners around the world;
- English language travel comprises an estimated 61% of this market.

### Promotion of English programmes by agents is reaching its cap

- 97% of all agents promote English language courses, French and German courses follow (both at 62%);
- Spanish courses occupy the fourth position with 51% of agents promoting this language;
- Other languages are promoted as follows: Italian (46%), Chinese (29%), Japanese (25%), Russian (22%) and Portuguese (21%).

### Agent customer structure is changing

- 78% of all customers opt for English language courses, 7% for French, 6% for German and 5% for Spanish;
- There are, however, regional variations – while 87% of Asian students choose English, language preferences in Europe are more diverse, with English being the choice of 74% students;
- 20% of agent customers are already multilingual customers (go abroad to learn two or more foreign languages).



### **Demand for all screened languages continues to grow**

- Over the 2012-2015 period, the highest growth levels were reported for English (63% of agents reporting growth in demand), German (56%), French (41%) and Spanish (41%);
- From 2015-2018, English is anticipated to grow (79% agents), followed by German (73% agents) and Chinese (65% of agents);
- Product offering of agents tends to be stable, with 40% of agents not envisaging adding a new language. Of those who do, 22% prefer Chinese, 14% are considering Japanese and 13% German and French courses.

### **Age trends are shaping the future of language travel**

- The most important target group remains 18-25, comprising on average 46% of all students;
- The share of junior students is up, bringing a potential change in the product offering;
- However, some source markets have reported an increase in the average age (Switzerland, Germany).

### **Reasons for learning a foreign language abroad have evolved to become more pragmatic and sophisticated**

- German and English are now primarily sought for current and future studies (62% and 61% of students respectively);
- In contrast, Portuguese and Italian were the two languages for which personal reasons dominate students' motivational factors (65% and 64% respectively);
- French exhibited the most balanced mix of reasons among all languages (personal vs employment-related vs education related), while Russian and Chinese courses were mostly associated with improving employment prospects (53.6% and 42.3% respectively).

### **Provider-agent relationship**

- An average responding education agent sends 526 language students abroad per annum;
- On average, responding agents work with 60 schools teaching English, which is the highest number compared to other languages;
- The average commission for all languages stands at 21.5% (23% for English).

### **Trends in domestic language learning**

- Evolution of domestic language learning mirrors the international demand for each language;
- English language training is showing the biggest increase in demand in the home country (more in developing than developed countries);
- 84% of agents indicated an increase in demand for English in private sector education in their home country.



# CHAPTER 1

## LANGUAGE SPEAKERS AROUND THE WORLD

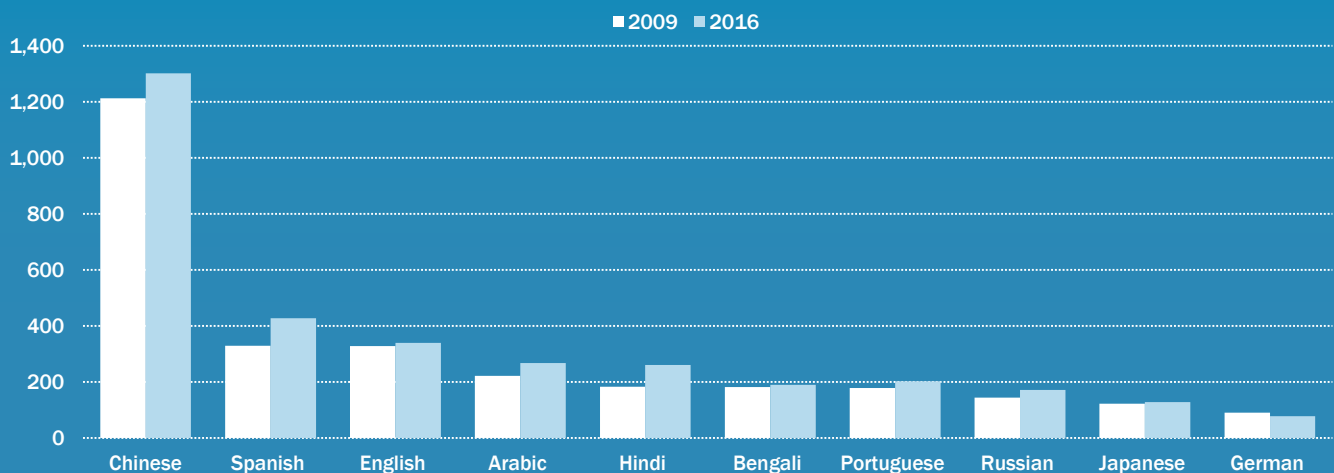


The language travel segment (language training abroad) exists within the larger environment for foreign languages. More specifically, the annual number of students learning a foreign language abroad represents less than 0.25% of all second language learners.

The aim of this chapter is therefore to provide a general description of the global environment within which the language travel market exists and analyse macro data and trends that help shed more light on the demand for studying a language abroad.

This study further elaborates on 9 major foreign languages in the language travel industry, namely Chinese, English, French, German, Italian, Japanese, Portuguese, Russian and Spanish.

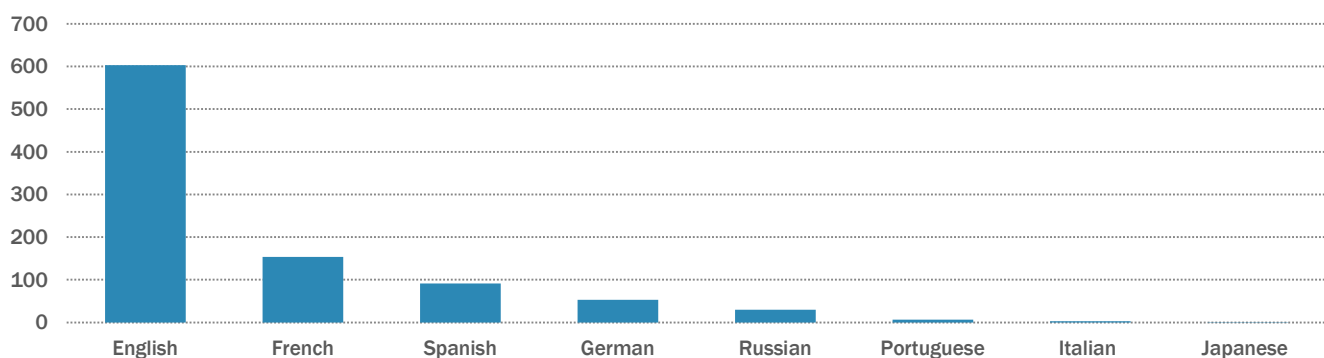
### TOTAL NUMBER OF NATIVE SPEAKERS BY SELECTED LANGUAGE (IN MILLIONS)



Source: Lewis, M. Paul, Gary F. Simons, and Charles D. Fennig (eds.), 2016. *Ethnologue: Languages of the World*, Nineteenth edition. Dallas, Texas: SIL International. Online version: <http://www.ethnologue.com>



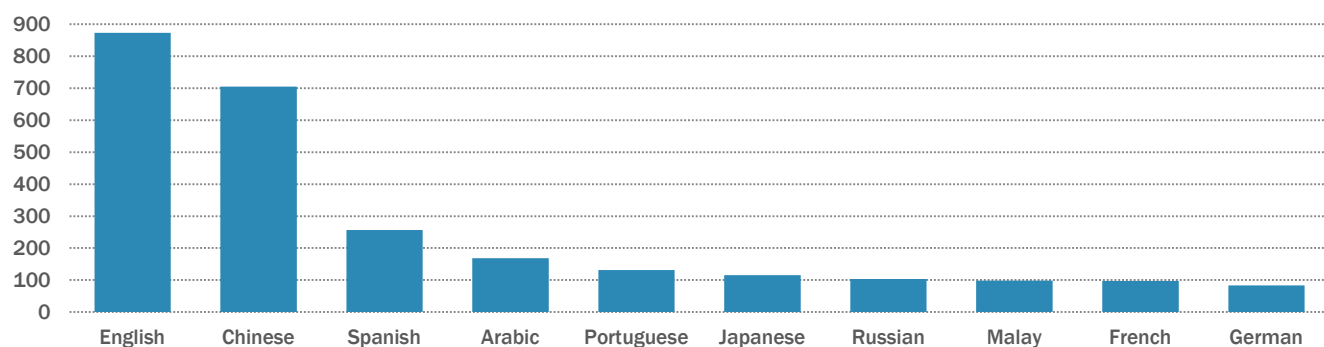
### TOTAL NUMBER OF SECOND LANGUAGE SPEAKERS BY SELECTED LANGUAGE (IN MILLIONS)



Source: Lewis, M. Paul, Gary F. Simons, and Charles D. Fennig (eds.), 2016. *Ethnologue: Languages of the World*, Nineteenth edition. Dallas, Texas: SIL International. Online version: <http://www.ethnologue.com>. Data on Chinese unavailable.

While Chinese is the most wide-spread mother tongue in the world, English is the most common language of second choice. English also leads the ranking of most utilised languages on the Internet, although Chinese has been closing the gap over recent years.

### INTERNET USERS BY LANGUAGE



Source: Internet World Stats, 2016



## LANGUAGE SPEAKERS AROUND THE WORLD

## Language test participation rates

The number of takers of foreign language tests is another supportive indicator that can assist in measuring the demand for foreign languages, especially in indicating trends in language learning. Interest in various language tests indicates an appetite for learning a particular language, predominantly nationally, since the majority of test takers sit the exam in their home country.

Therefore, as a part of this project the research team approached major language test administrators for the languages screened in order to gather the most recent, as well as trend, data.

Although the main purpose of these tests is to assess the language proficiency of a student, not all data obtained across the 9 examined foreign languages was fully comparable. Furthermore, as no data was found for Italian, Portuguese and Russian, they are not featured in the following analysis.

**English | IELTS**

The International English Language Testing System (IELTS) was introduced in 1989 and has been taken 15,000,000 times worldwide. The exam is produced by Cambridge English Language Assessment and jointly owned with the British Council and IDP: IELTS Australia.

In 1994 there were 210 IELTS centres in 105 countries. The figure had climbed to 800 locations in 130 countries by 2010. More than 2.5 million people took the exam in 2014.

**Chinese | HSK**

In 1992, the Ministry of Education began to promote the Chinese Proficiency Test (HSK), both at home and abroad. In total, there are 728 test sites in 91 countries.

The most recent official figure of HSK test takers dates back to 2009, claiming that more than 600,000 Chinese language learners registered and attended the test.

**French | DELF-DALF**

The French Ministry of Education awards a certificate to international test takers of French language proficiency test DELF-DALF. In 2014, the number of students registered for the certificate reached 404,406 worldwide.

There are 1,165 DELF-DALF test centres worldwide, including 112 located in France.

**German | TestDaF**

Since 2001, a total of 257,296 people from 182 countries have taken the Test of German as a Foreign Language (TestDaF). In 2015 the number of participants reached 37,881 students and there were 386 test centres in 82 countries offering the test. Overall, 95 countries are licensed to represent the test in their territories.

In 2015, further test centres opened in the Russian Federation, Turkey, Uganda, the USA and Kazakhstan. There was also a growth of the network in Germany itself. German learners from 182 countries have taken the TestDaF since its introduction.

**Japanese | JLPT**

The Japanese Language Proficiency Test (JLPT) was introduced in 1984 by the Japan Foundation and Japan Educational Exchanges and Services (formerly Association of International Education, Japan) for the purpose of evaluating foreigners' Japanese proficiency.

Since its introduction, the number of participants has increased from 7,019 to 594,682 in 2014. In 2014, JLPT was taken in 258 cities in 67 countries around the world – including 145,218 tests taken in Japan alone.

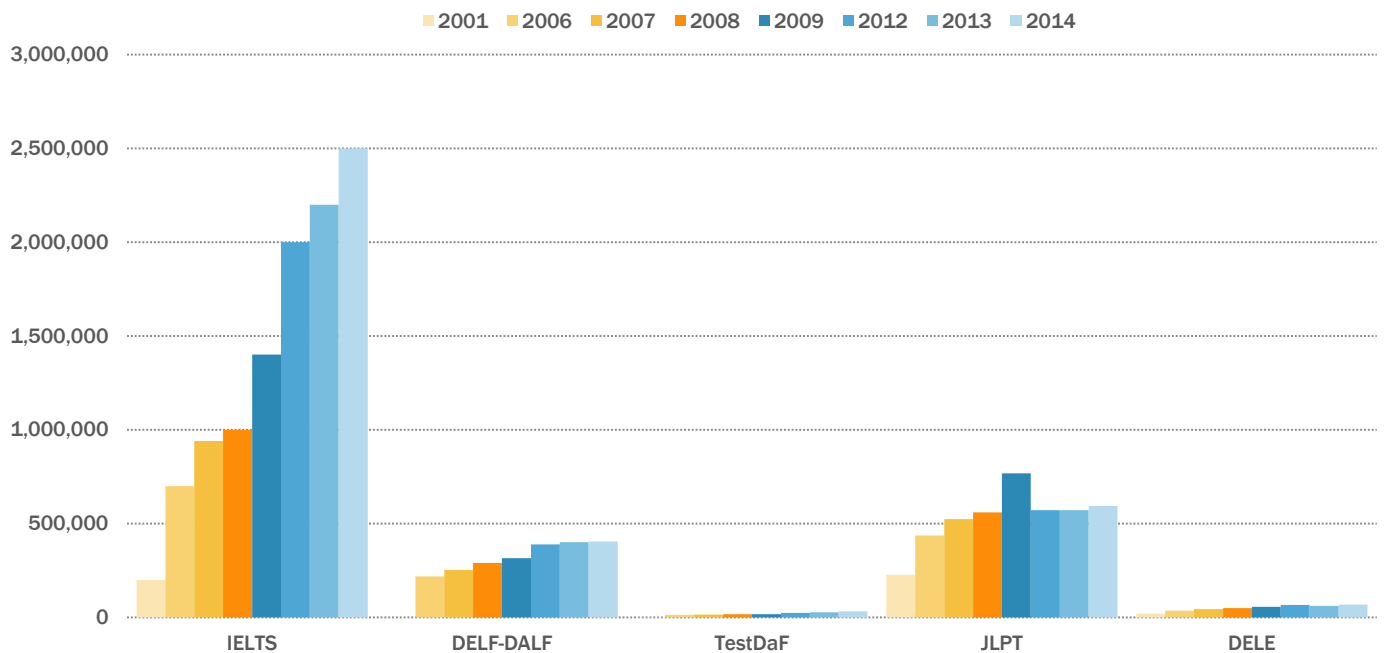
**Spanish | DELE**

Foreigners learning Spanish certify their proficiency with Diplomas of Spanish as a Foreign Language (DELE) granted by the Ministry of Education, Culture and Sport of Spain. Two institutions are delegated by the Spanish Ministry of Education to deal with the test in the field. The Universidad de Salamanca designs the exam and deals with the exam correction process, while Instituto Cervantes organises examination sessions.

During 2012-2013, 66,281 Spanish learners took DELE in 833 exam centres worldwide, representing an increase of 9% over the previous year in the number of test centres. In 2014-2015 the number of test takers increased to 67,657.



### COMPARISON OF SELECTED LANGUAGE TESTS BY NUMBER OF TAKERS



Source: IELTS Annual Review, 2010-2014, 2014; CIEP Annual DELF-DALF Report & CIEP Annual Report, 2007-2014; Die Gesellschaft für Akademische Studienvorbereitung und Testentwicklung e. V., 2016; Japan Foundation and Japan Education Exchange and Services. Statistics on the Official Worldwide Japanese-Language Proficiency Test Website, 2014; Instituto Cervantes Annual Report, 1999-2014

All tests that it was possible to gather data for show a growing number of participants every year. The number of test takers for each language test analysed has grown at a steady rate over the last 10 years, indicating natural growth in the demand for these languages.

As portrayed in the graph above, the number of IELTS participants experienced the highest increase due to the disproportionately larger number of English learners compared to other languages. However, in terms of percentage growth, the number of TestDaF

participants outpaces any other proficiency test, identifying a positive trend for learning German. In contrast to German, the figures for both Spanish and French language proficiency tests are plateauing. Over the last three years, the number of test takers has remained stable.

In 2009, a record number of 768,113 people took the Japanese Language Proficiency Test. However, the next year it experienced a steep decline of more than 160,000 examinees, with growth levels only returning in 2014.

## LANGUAGE SPEAKERS AROUND THE WORLD

## Global language travel market

Apart from learning a foreign language in their home country, millions of people also travel abroad for this purpose.

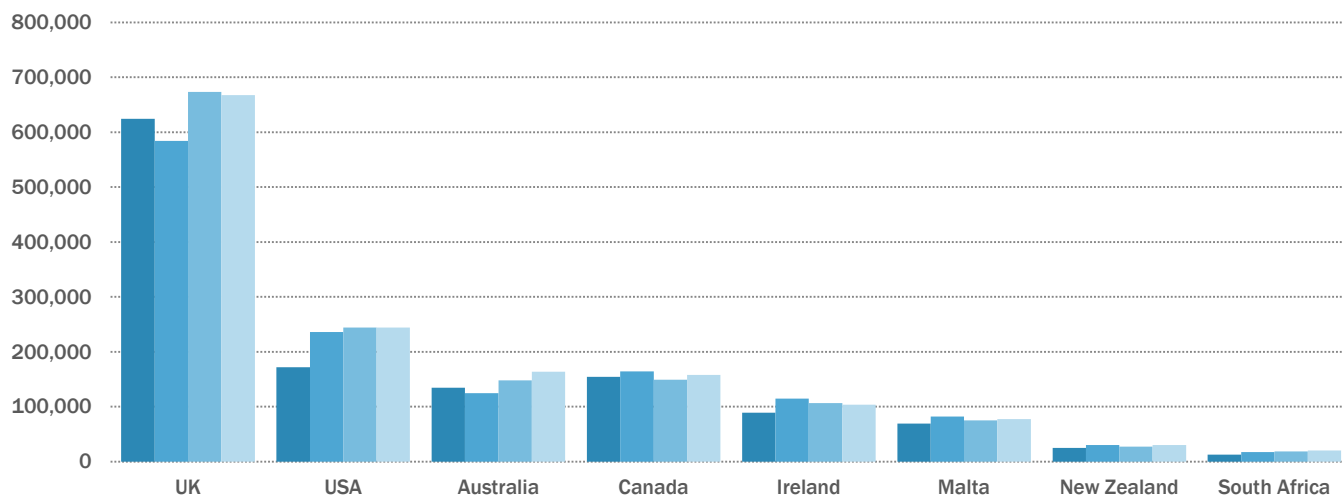
One of the core objectives of this initiative was the best possible estimate of the global market size for the 9 languages in question. Extensive desk research of over 60 sources and references revealed that a minimum of 2,280,000 students took a language course abroad in 2014.

**Note:** Data might not be directly comparable as this is an indicative overview of market size for each of the languages evaluated. Some languages can be better assessed due to the transparency of official institutions in sharing the results of their measurements (enabling even breakdowns into source markets), while others lack a measurement model altogether.

### English

English language travel represents an estimated 61% share of all language learners worldwide. A total of 1.4 million people choose to study the language abroad every year.

#### NUMBER OF STUDENTS STUDYING ENGLISH IN 8 MAJOR ELT DESTINATIONS



Source: StudentMarketing, 2016

### Chinese

According to the China Education Yearbook, 175,676 international students studied Chinese at Chinese universities in 2012. China's University and College Admission System claims that there are more than 300 universities and 20,000 courses available for international students to study Chinese in China.

In addition, there are approximately 160 Chinese language centres in China for foreign learners that are publicly known and actively promote themselves online. It can therefore be estimated that a minimum of 250,000 people per annum take a Chinese language course.

### French

There are 326 institutions in four major destinations (France, Canada, Switzerland and Belgium) teaching French to international students. Based on the recent research by Languages Canada and StudentMarketing, there were approximately 150,000 French language learners in 2014.

The highest demand comes from European countries, namely Italy, Switzerland and Germany (accounting for 13%, 9% and 8% of all French language students abroad respectively).

## German

Although no statistics exist on the number of German language learners abroad, based on secondary references and market observations, it can be estimated that a minimum of 150,000 students take a German language course abroad per annum (a combined figure for Germany, Austria and Switzerland).

It is also important to mention that 17% of all higher education students in Germany also took a language course in Germany (some 54,000 students).

As highlighted in Chapter 2, the subsequent primary research also indicated that German caters to a similar number of learners as French.

## Japanese

The total number of international students coming to Japan to learn Japanese increased from 25,622 in 2011 to 44,970 in 2014.

The biggest cohort of students in Japanese language institutes comes from Asia (96%), with China (16,607 students) and Vietnam (15,265) being the top source countries.

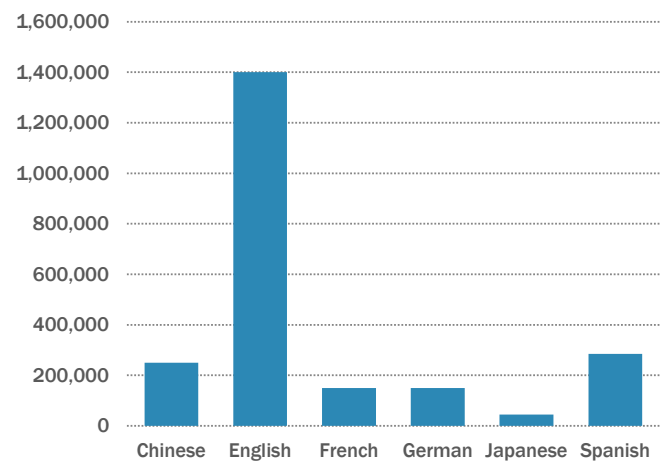
## Spanish

Based on available information and references, Spanish is being learned by a minimum of 285,000 students. Most of them opt for Spain (conservative estimate of 200,000, based on various references and years, including FEDELE and Instituto Cervantes).

However, a significant number of students study Spanish in Argentina (the Argentinian Asociación de Centros de Idiomas reports 50,000), as well as Mexico (Instituto Cervantes estimates 35,000).

Data on other destinations (e.g. in Latin America) is largely unavailable.

## INDICATIVE OVERVIEW OF THE NUMBER OF LANGUAGE LEARNERS ABROAD (2014)



Source: StudentMarketing, 2016

Although trend data for all major languages is not obtainable, from available statistics and observation, the language travel industry is growing at a moderate pace.

While English dominates the number of learners abroad, that number is not growing as fast as in the last decade (2%). This is also due to the fact that, as of 2012, the number of English speakers and learners neared 3 billion.



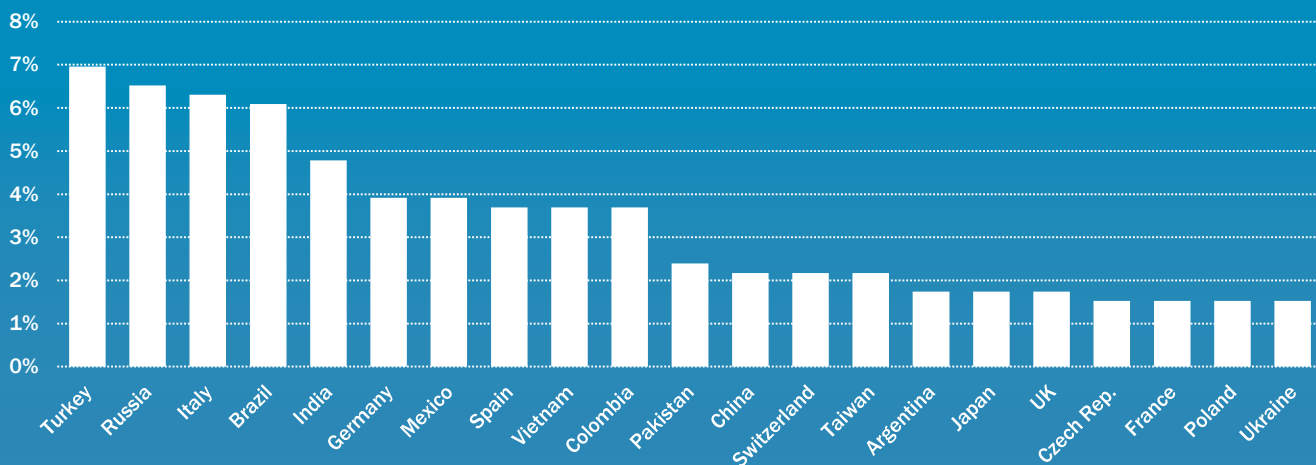
# CHAPTER 2

## TRENDS IN LANGUAGE LEARNING ABROAD

This chapter builds on the primary data collected from education agents as part of a global B2B survey, as well as in-depth interviews with pre-selected agent representatives. Gathering internal statistics from agents allowed for a unique and comparable analysis of the demand for foreign languages, as well as various benchmarks.

Quantitative data was provided by 466 education agents from 74 countries. In addition, 21 agents also took part in phone interviews and provided supplementary qualitative insights which were incorporated throughout the study.

### TOP RESPONDING AGENTS BY HEADQUARTERS LOCATION

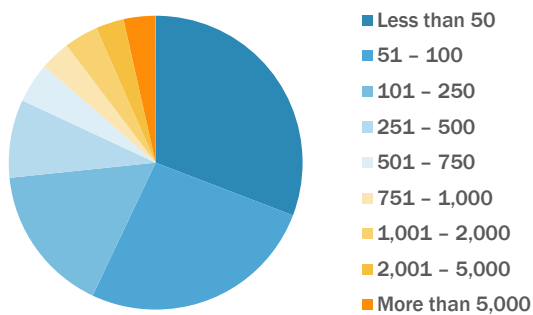


n=466; despite attempting a number of quantitative and qualitative techniques, agents from Saudi Arabia and the USA are under-represented in the research sample

The research sample was diverse in terms of both headquarters location and the number of language students catered for. The chart above depicts the participating agents representing different parts of the world in the project.

It is worth mentioning that the pool of top countries presented in the research largely aligns with the list of top source markets in the language travel industry (in terms of their sending power).

### RESPONDING AGENTS BY NUMBER OF LANGUAGE STUDENTS SERVED IN 2015



n=454

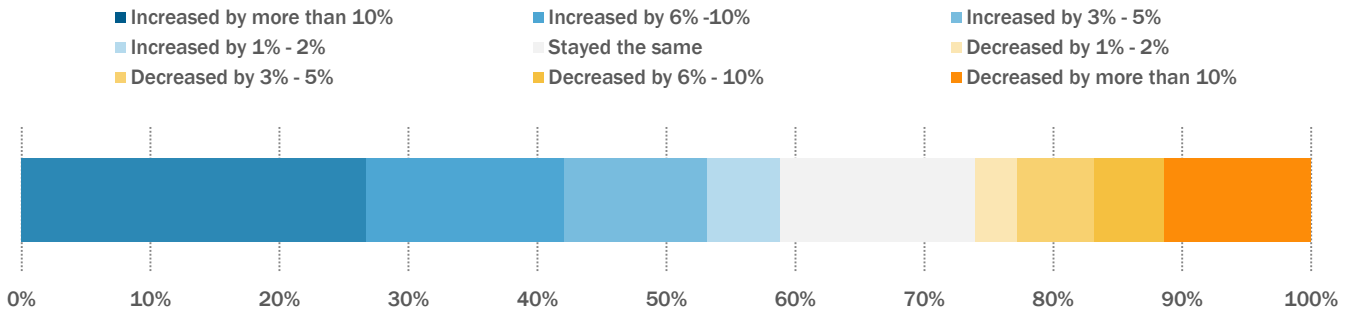
The number of students sent by education agents in the sample averaged out to 526.

Also, looking at the distribution of agent respondents in the research sample by their size, it can be deduced that 18% of agents represent 83% of the total agent production (in line with the overall market situation and 80/20 Pareto Principle).

At the other end of the market are 73% of agents that do not send more than 250 students abroad per annum.



**RESPONDING AGENTS  
BY 2014/15 TREND IN STUDENT NUMBERS**



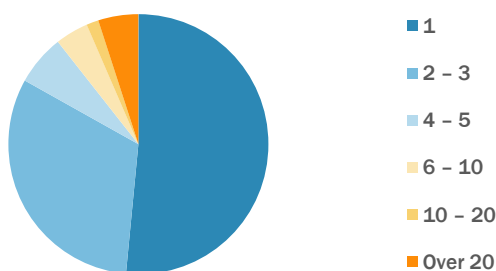
n=449

The majority of agents marked 2015 as a year of growth for their businesses – 59% of respondents reported an increase in the number of students sent abroad, with 27% achieving double-digit growth in the number of language students served. However, 26% of agents experienced a downturn from 2014 to 2015.

The highest ratios of agents reporting growth were predominantly from Argentina, China, Colombia, India, Mexico, Pakistan and Vietnam.

Conversely, the majority of agents experiencing a decline in student numbers were based in Russia.

**RESPONDING AGENTS  
BY NUMBER OF OFFICES**



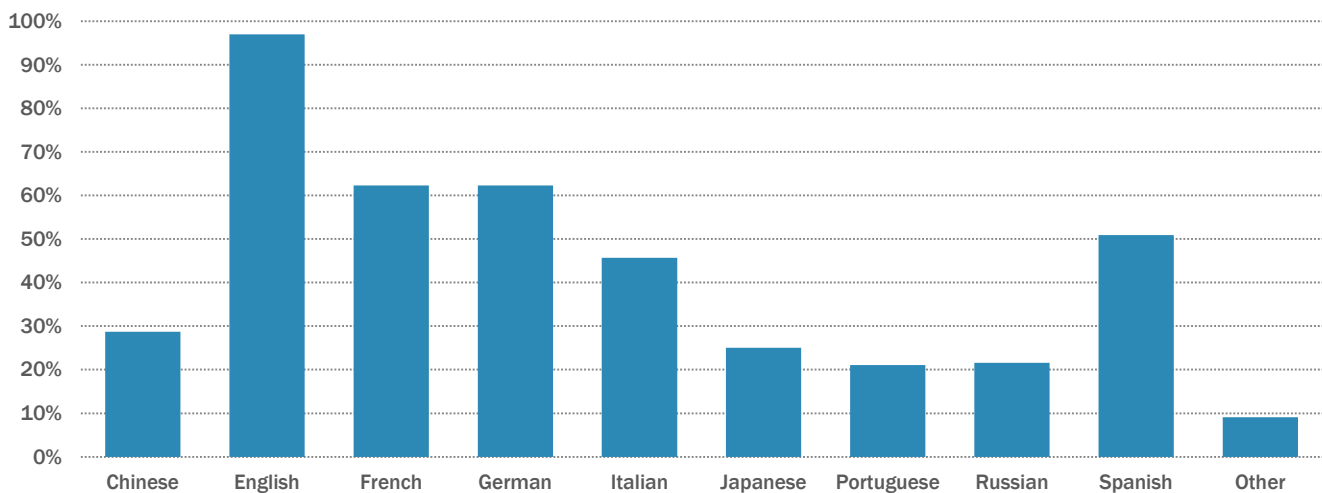
n=462

Just over half of agents surveyed (52%) operate from one office, in line with the overall industry context. The share of larger and largest agent chains (operating from over 20 offices) is proportionally stronger than the industry average, as it was mostly bigger agents who promote multiple languages who participated in this research.

## TRENDS IN LANGUAGE LEARNING ABROAD

## Overall demand levels

## PERCENTAGE OF AGENTS PROMOTING THE FOLLOWING LANGUAGES



n=464; multiple responses possible

English language continues to occupy the leading spot among foreign language courses promoted by education agents.

The preference for English continues to predominate. Even in countries where English reaches high levels of proficiency, agents receive the majority of enquiries for English courses. However, students increasingly opt for more specialised programmes (not General English programmes, but courses like test preparation, professional and executive courses, etc.).

French and German are offered by 62% of responding agents. The fourth spot was occupied by Spanish, promoted by every second agent.

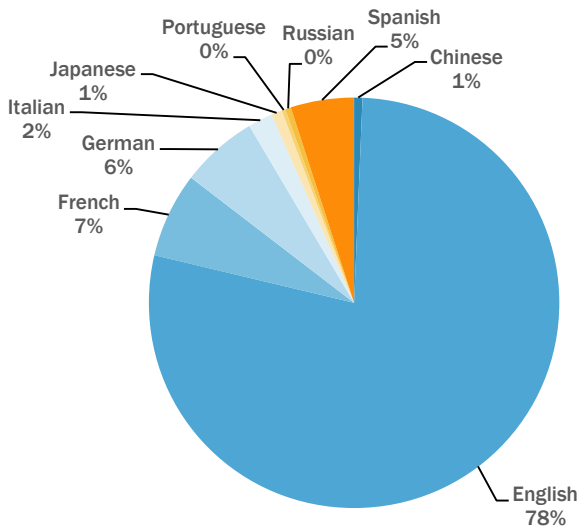
Most frequent among 'other' languages were Arabic, Korean, Turkish and Polish (in order of importance).

The research also identified a correlation between agent size and the number of languages promoted. While agents sending over 1,000 language students abroad per annum offer, on average, 5.7 languages, agents with fewer than 250 customers per annum promote 3.5 foreign languages.

Insights gained from the in-depth interviews with agents revealed that most agents perceive promotion of as many languages as possible as a business opportunity (70% of agents) rather than a necessity (20%). Agents stated that promotion of multiple languages helps them become more appealing to different customer types, establish an international and diverse image for their company, and be more competitive.

Only two out of 21 agents interviewed perceived managing a portfolio of multiple languages as a burden. Some agents went on to say that once an agent has picked a focus, promotion of the maximum number of languages requires a massive amount of working content in all these different languages, which is costly and time consuming.

**PROPORTION OF STUDENTS APPLYING FOR THE VARIOUS FOREIGN LANGUAGE PROGRAMMES THROUGH AGENTS IN 2015**



n=381

Quantitative data from agents also provided a unique overview of their student base broken down by language. The resulting averages show that 78% of all agent customers opt for English language courses. French represents 7% of all students, while German was the language of choice of 6% of students.

On the other hand, Chinese, Japanese, Russian and Portuguese still remain a marginal 'business' for agents. Education agents report that this is due to the demand levels for these languages being rather low, when compared to the above-mentioned languages.

It is therefore noteworthy that the results confirm the hypothesis that agents' language offering, in the main, mirrors overall students' preferences. Agents tend to adapt to the marketplace by promoting languages they experience local demand for.

However, as will be shown below, regional variations exist (for instance, agents in Europe accommodate the most diverse language preferences of their customers). The overview represents a useful tool for language providers to benchmark their regional focus in relation to recruitment through agents.



## BREAKDOWN BY SOURCE REGION

Source region	Chinese	English	French	German	Italian	Japanese	Portuguese	Russian	Spanish	Other
Europe (n=177)	1%	74%	8%	6%	3%	0%	0%	1%	6%	0%
MENA (n=36)	1%	86%	3%	8%	0%	0%	0%	1%	1%	0%
Asia (n=69)	1%	87%	2%	5%	1%	2%	0%	0%	1%	1%
LATAM (n=75)	0%	77%	10%	5%	3%	1%	1%	0%	4%	0%

**Note:** Percentages do not add up to 100% due to rounding.

Europe and Latin America are the regions where the demand for non-English languages is the strongest, French being the No.1 option of this group of languages. Asia and MENA still predominantly opt for English (87% and 86% respectively), and German is forming the second strongest in both these regions (5% and 8% respectively).

Where a sufficient sample size in terms of the number of responding agents was achieved, an informative breakdown by source country is displayed below.

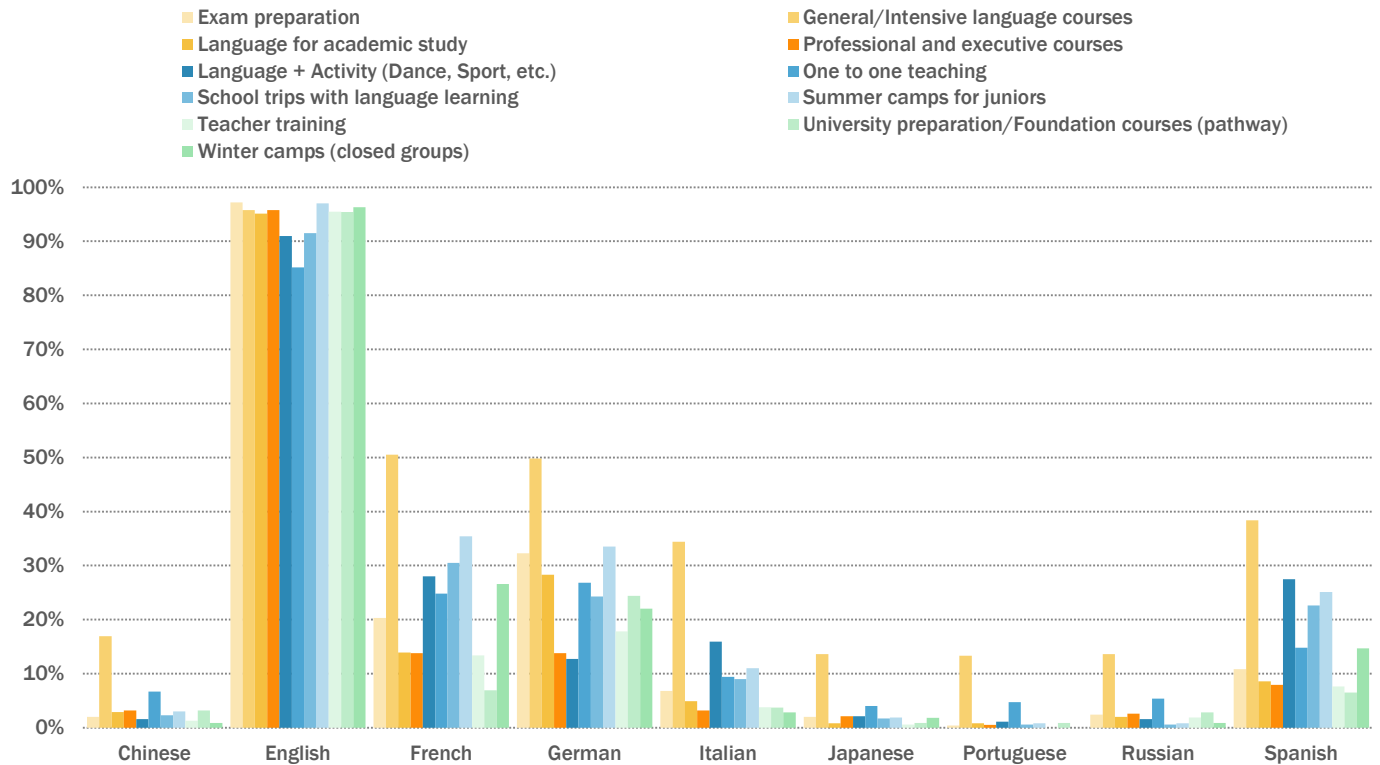
## BREAKDOWN BY SOURCE COUNTRY

Source country	Chinese	English	French	German	Italian	Japanese	Portuguese	Russian	Spanish	Other
Turkey (n=30)	0%	86%	3%	5%	1%	0%	0%	1%	2%	1%
Russia (n=27)	3%	80%	6%	5%	2%	1%	0%	0%	3%	0%
Italy (n=24)	1%	77%	9%	4%	1%	0%	0%	0%	7%	0%
Brazil (n=22)	0%	76%	6%	4%	3%	3%	1%	0%	7%	0%
Mexico (n=16)	0%	83%	10%	4%	3%	0%	0%	0%	0%	0%
India (n=15)	0%	78%	5%	13%	1%	1%	0%	0%	2%	0%
Vietnam (n=15)	0%	99%	0%	0%	0%	0%	0%	0%	0%	0%
Colombia (n=15)	0%	78%	12%	6%	2%	0%	1%	0%	0%	0%
Spain (n=13)	0%	78%	16%	3%	2%	1%	0%	0%	0%	0%
Germany (n=12)	1%	61%	8%	1%	4%	1%	2%	1%	20%	1%

**Note:** Percentages do not add up to 100% due to rounding.



**MOST PREFERRED PROGRAMMES BY LANGUAGE ACCORDING TO AGENTS' CUSTOMERS**



n=331

General and Intensive language courses continue to occupy the leading place among agency customers for all languages except English.

Unlike other languages, the demand for English is both equally and widely spread for all types of programmes. However, exam preparation and summer camps for juniors are currently more preferred than General and Intensive language courses.

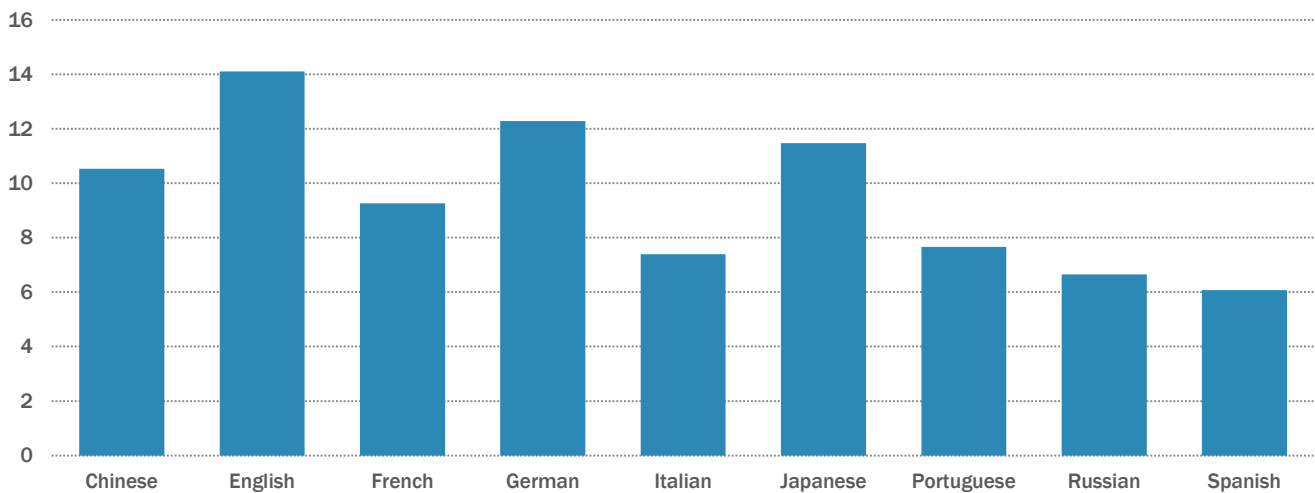
In fact, this development is in line with the overall trend in English learning. Nowadays, domestic English language training often begins at an earlier age as part of the school curriculum (resulting in increased demand for junior programmes abroad). With English language proficiency reaching higher levels among young people, there is a lesser need to take a General or Intensive English course in adulthood. English courses abroad are therefore undertaken for more purpose-specific reasons

(e.g. exam preparation, academic English for further study, etc.).

The current preferences for French, German, Spanish and Italian language courses are comparable to those for English a decade ago – General and Intensive programmes are predominant and almost twice as popular as summer camps and school trips (mini-stays). Courses for academic and test preparation follow, while the remaining course types (e.g. teacher training) display low demand.

During in-depth interviews, agents highlighted growing interest in one to one teaching (more personal approach) across all languages. Moreover, they expect that the language course offering will have to become more specific and practical to fulfil customers' professional needs – students will aim to get the most for the shortest possible period of time, with course attributes tailored exactly to meet their needs.

### AVERAGE LENGTH OF STAY OF AGENTS' CUSTOMERS PER LANGUAGE (IN WEEKS)



n=343

According to responding agents, students enrolled in English language courses stayed for an average of 14 weeks, improving their English proficiency. However, the figure reflects both long-term EAP (English for Academic Purposes) students (many stay for 20 weeks and more), and short-term summer camp and school trip students (length of stay averaging out to 2 weeks).

While the former is pulling the average up and the latter taking it down quite equally for English (similar numbers of both groups), other languages show a higher proportion of adult students. Consequently, it is possible to say that the other languages not only do not reach the average length of stay of English language courses, but would fare even worse if English had the same proportion of long-term and short-term stays.

The Spanish language average is the lowest due to a high proportion of junior students as well as the rather short stays of adults – often because the language course is taken as part of a vacation or alongside some other primary activity.

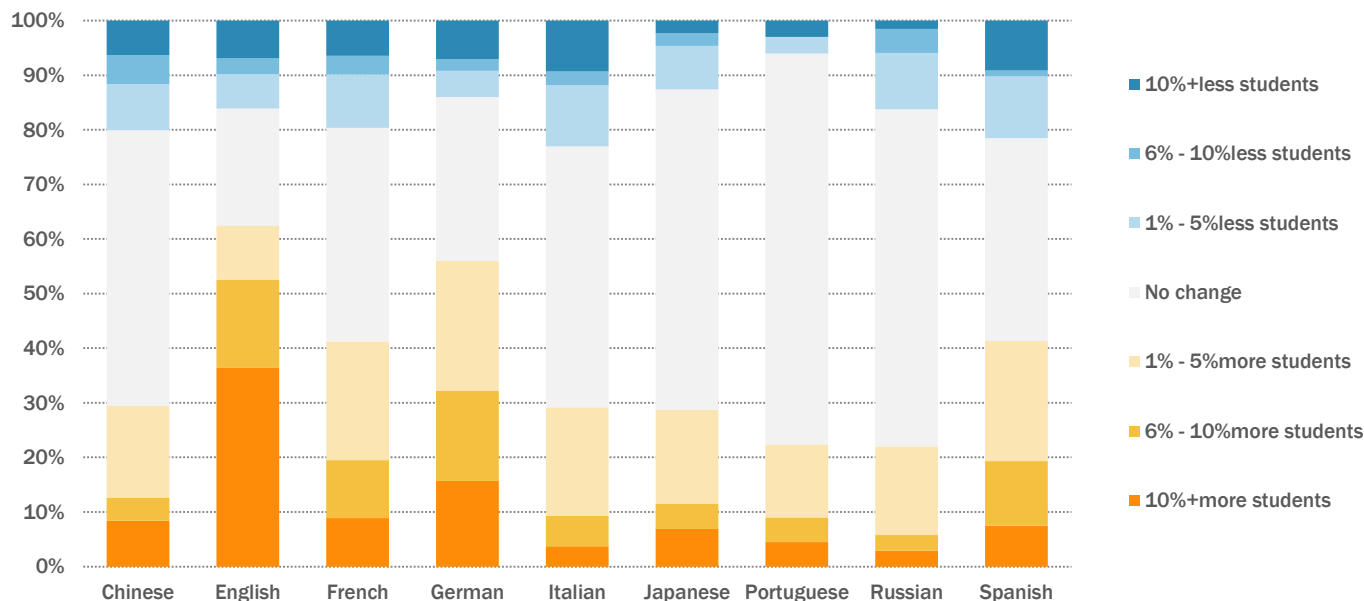
This may also be a reason why averages for Chinese and Japanese language training are higher than for many other languages. Most of their students arrive with low proficiency or to study for academic purposes, thus increasing the need to study the language for a longer period of time.

Also, Chinese and Japanese are considered to be some of the most difficult languages to learn (especially for English speakers). In fact, some languages are more difficult to learn than others, Italian, French, Spanish are among the easiest, hence the influence on shorter stays when on language training abroad.

## TRENDS IN LANGUAGE LEARNING ABROAD

## Trends in demand levels

## DEVELOPMENT IN DEMAND FOR PARTICULAR LANGUAGES AS REPORTED BY AGENTS (2012 VS 2015)



n=379

In addition to assessing whether demand for a particular language grows, stays stable or declines, agents were asked to provide detailed demand development data. As a result, it was also possible to outline the extent to which demand is either accelerating or decreasing for individual languages: reported as demand difference in the last 3 years and demand projections for the next 3 years.

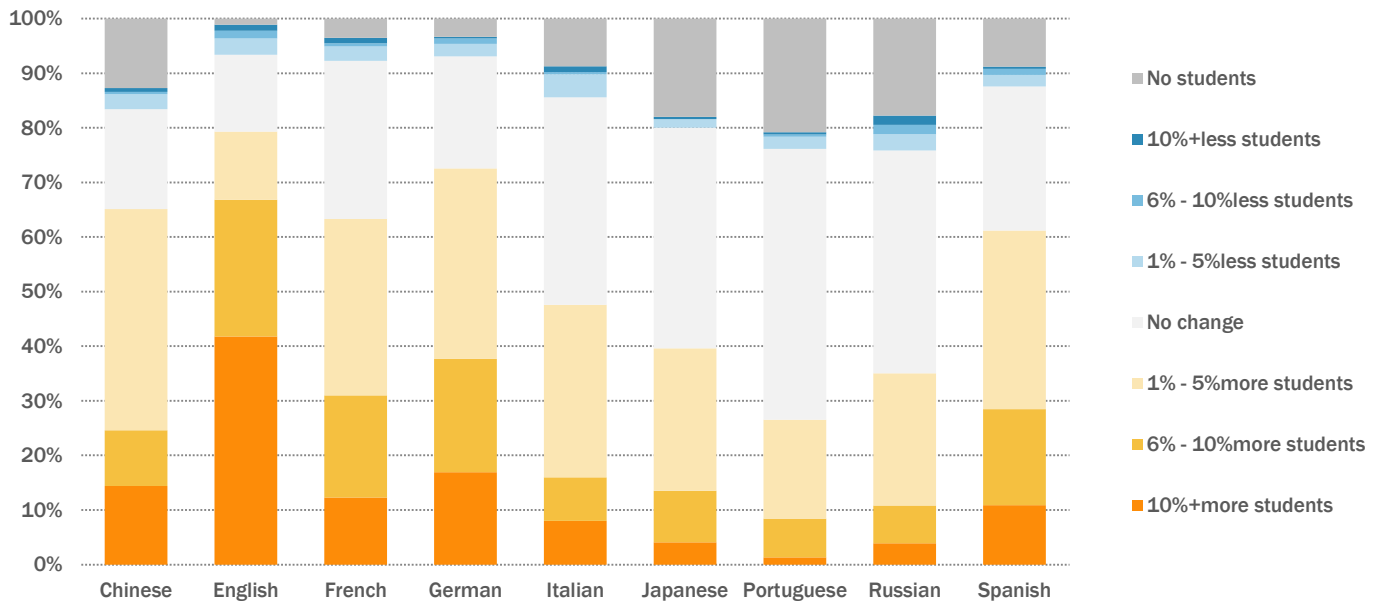
In the last 3 years, education agents most often reported an increase in demand for English language (63%), followed by German (56%) and French and Spanish (both at 41%). Interestingly, Chinese is now experiencing strong growth and has overtaken Italian and Russian.

Naturally, the picture changes and varies by particular regions. Asia and Latin America noticed minor growth for anything other than English (even though French and German fared well), while demand for English courses increased significantly.





### FUTURE PROJECTED DEVELOPMENT IN THE DEMAND FOR PARTICULAR LANGUAGES AS REPORTED BY AGENTS (2015 VS 2018)



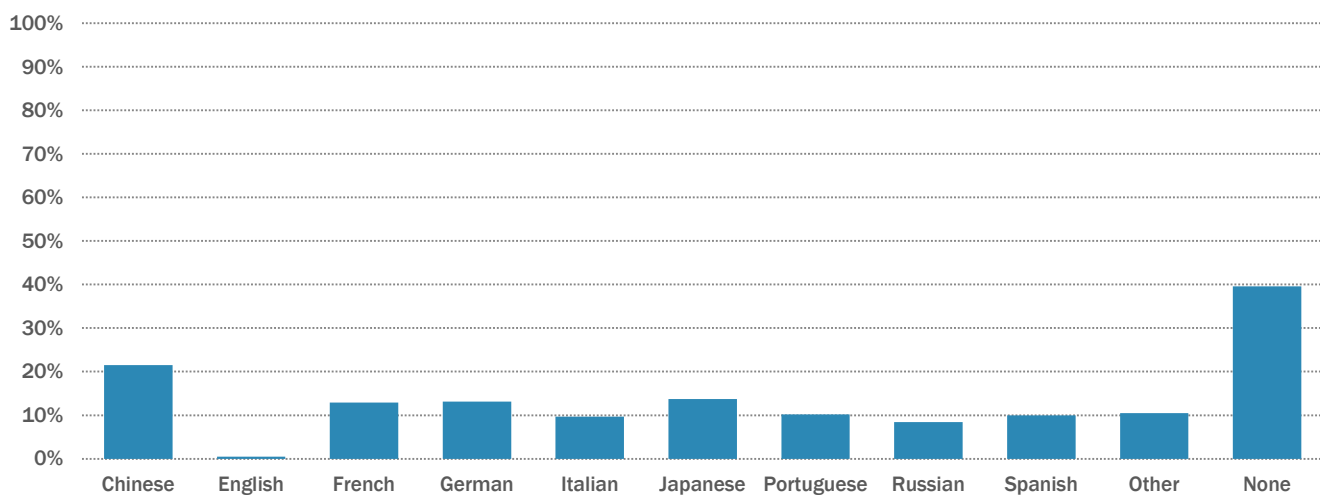
n=368

Almost 80% of education agents believe the demand for English courses abroad will continue to grow and will be the strongest in the next 3 years. Even though the structure of demand may change due to recent developments in the market (lower demand for adult courses, more demand for junior courses), education agents repeatedly stressed that English proficiency is a compulsory criterion required by any prospective employer and represents almost a necessary skill for professional success – especially in the home country.

However, confidence in the growth of other languages is also significant. When comparing previous growth in demand with anticipated development (even though it is a comparison of empirical evidence with uncertain estimates, but by the same respondents), agents were more optimistic about future increase in the demand for Chinese, German, French and Spanish than English.

The future outlook is in line with other market developments and needs, where foreign languages are required for career and business, representing a competitive advantage in the job market. While knowledge of English was sufficient in previous years, it is reaching its saturation point (3 billion people speak or learn English). Other languages are coming to the fore and the market is experiencing a tendency towards multilingualism – driven primarily by the uptake in German, Chinese and French language training.

### LANGUAGES AGENTS WOULD LIKE TO ADD TO THEIR PORTFOLIO OVER THE NEXT 12 MONTHS



n=381; multiple responses possible

When asked about which languages they would potentially add to their portfolio, a considerable proportion of agents tend to be satisfied with their current offering. 40% of responding agents do not plan to enrich their language portfolio in the coming 12 months.

However, when considering the addition of new languages, 22% of agents look to add Chinese, although some interviewed are aware this may be a short-term trend. Chinese was followed by Japanese (14%), which still has considerable space to grow within agent portfolios (currently promoted by 25% of agents). Another 13% of agents would like to add German and French courses, underlining the existing competition between these languages.

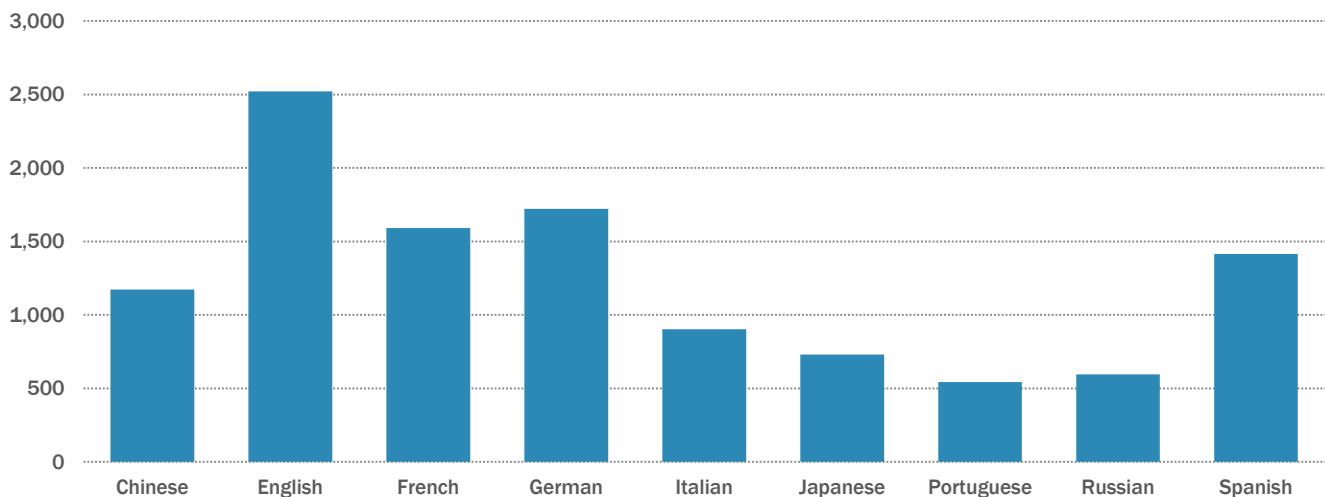
English is ranked last, due to its existing high share in agents' portfolios. Other languages agents would like to add were primarily Arabic, Korean, Norwegian and Swedish.



## TRENDS IN LANGUAGE LEARNING ABROAD

## Reasons for learning a language abroad

## LANGUAGES IN ORDER OF IMPORTANCE FOR FUTURE SUCCESS TO AGENTS' CUSTOMERS (SCORE)



n=285; score is a weighted calculation

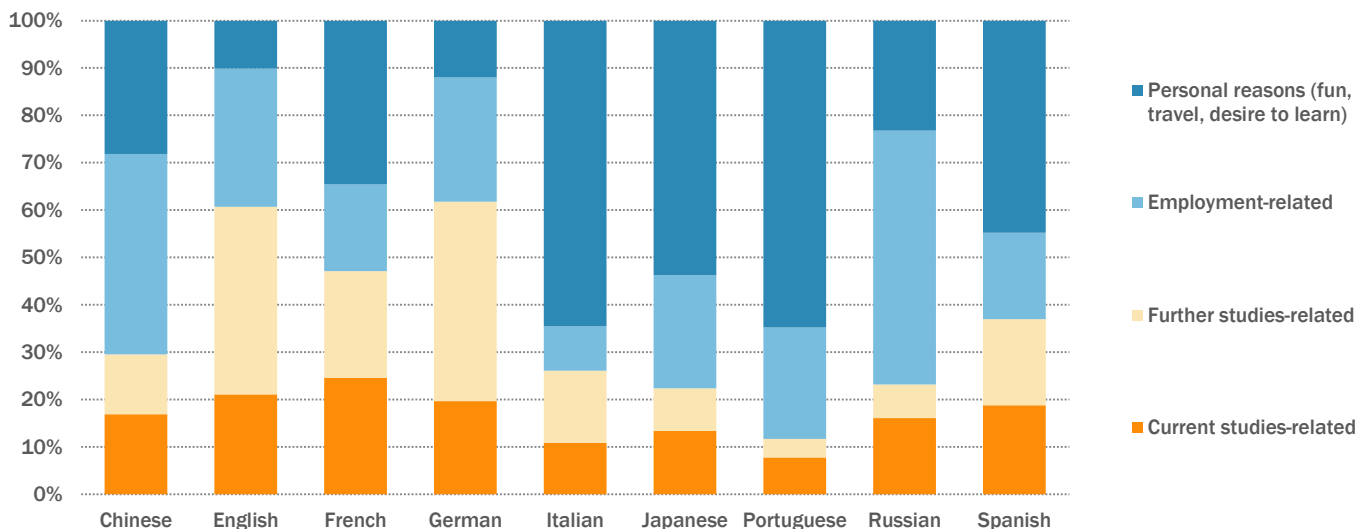
In line with our previous evaluation, agents consider English to be the most valuable choice for their customers with regard to their future success. Chinese was the first non-European language to appear in the ranking.

Education agents also shared their insights on the topic of travel destinations. The majority of agents interviewed do not see a trend of traditional travel destinations being overtaken by non-traditional destinations (e.g. Philippines for English, Martinique for French, and Central America for Spanish).

More exotic/unconventional destinations have their share of popularity among agents' customers, with certain economic benefits or the desire for a new experience, but traditional destinations are set to prevail.



**CUSTOMERS' REASONS TO LEARN A PARTICULAR LANGUAGE ABROAD AS REPORTED BY AGENTS**



n=317

This benchmark revealed different patterns in the primary motivation for learning the 9 languages in question.

Firstly, the results confirm the shift in English language travel in terms of the language nowadays being learnt for a specific purpose rather than being the purpose in itself (personal reasons). While this shift was quite well-spread among the industry, the results suggest that German especially follows the same development pattern. The majority of German learners pick the language because they intend to undertake further studies in German.

By contrast, Portuguese and Italian were the two languages where personal reasons dominated the motivation to study, while French offered the most balanced mix of reasons among all languages.

Russian and Chinese courses abroad were mostly associated with empowering employment prospects. These languages have become a feature that distinguishes a student's CV from other applicants.

In-depth interviews brought additional insights. Agent representatives mentioned that customers who seek a life

change or desire new cultural experiences tend to opt for Italian and Spanish language courses rather than other languages.

The language travel industry represents multilingual customers, as reported by agents. While the majority of students (79%) learn a particular language as their second one, every fifth agent customer went abroad to learn a second or further foreign language.

Agents attracting multilingual customers also tend to fare better than the industry average business-wise, with none reporting a decline in their student numbers from 2014 to 2015.

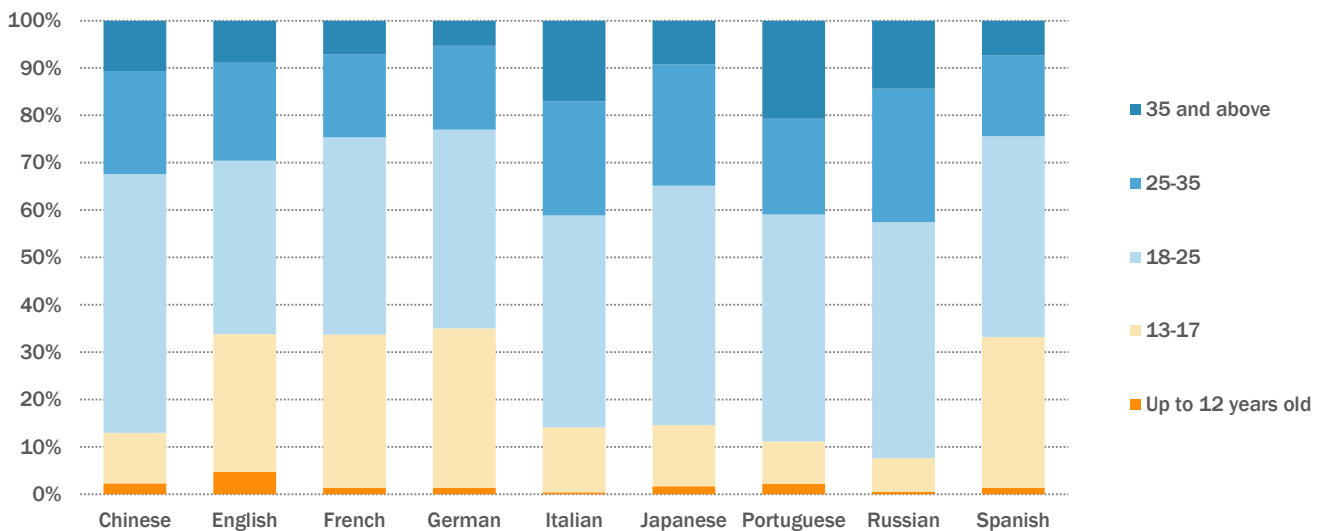
All agents who participated in the in-depth interviews highlighted the multilingual attributes of students in their countries.

English being, in most cases, the first foreign language students learn, is reaching high proficiency levels which, in turn, influences students' choice for further foreign language studies. Agents predicted a further deepening of the trend towards multilingualism, with adults realising the need to be proficient in more than one foreign language.

## TRENDS IN LANGUAGE LEARNING ABROAD

## Age group specifics

## AGE STRUCTURE OF AGENTS' CUSTOMERS BY LANGUAGE



n=328

This research initiative also revealed an up-to-date age composition of the customer base (channelled through education agents) and aimed to identify possible emerging shifts in age breakdowns.

Generally speaking, people tend to start learning language at an increasingly earlier age, which is a driver that will also shape the future of the global language travel market. Consequently, students improve their language proficiency in earlier stages of their lives, hence the greater need for language training abroad for the junior age segment.

Moreover, it influences their future decisions in adulthood, as they do not necessarily need General English at that time (e.g. possible shift to a more focused language course instead of General course, or taking up another foreign language later on).

In some destinations, junior students aged under 18 already represent a significant proportion of language travel students – for instance, in the UK (47% of all students as reported by English UK), Ireland (47% as reported by Marketing English in Ireland), and Malta (45% as reported by the National Statistics Office).

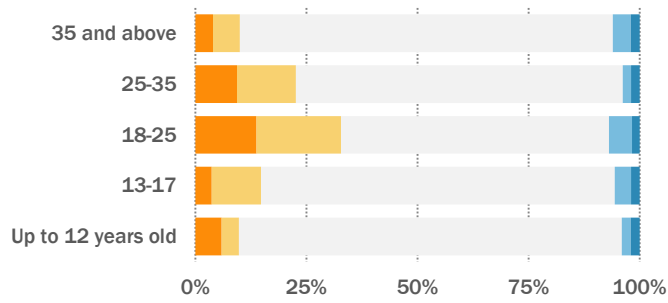
However, students aged 18-25 represent the biggest age group in all 9 languages analysed. On average, 46% of all agent customers fall under this category, making it the most important target group for agents.

The highest share of juniors sent abroad (below 18) was reported for German courses (35% of all customers were juniors in 2015). French and English followed closely, with an average share of 34% of total agent production. Spanish also exhibited a high proportion of junior students (standing at 33%).

Based on in-depth interviews, respondents claim that parents are more inclined to send their children abroad at an earlier age (except for Colombia, which tends to be a family market, and Russia where parents are traditionally used to sending young students abroad). Nowadays, there is more comfort in sending children, although the current migration crisis in Europe has eroded this trust to some extent.

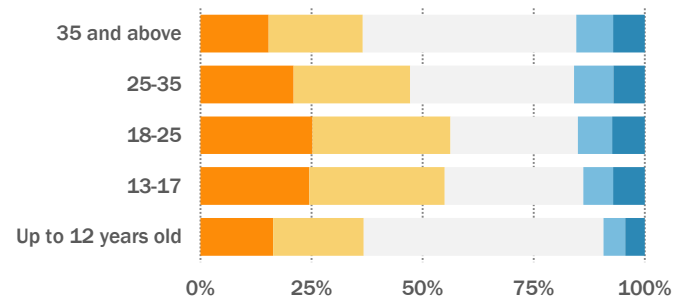
In order to provide the ever-important trend data, demand level changes for each language in last 3 years, as well as by age group, were also assessed separately, enabling a more detailed analysis of trends by language and by age group.

**DEVELOPMENT OF STUDENT NUMBERS FOR CHINESE LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**



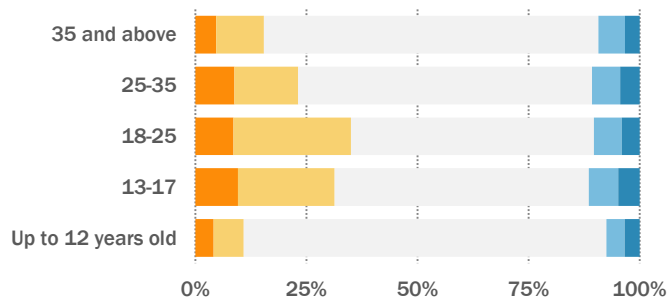
n=58

**DEVELOPMENT OF STUDENT NUMBERS FOR ENGLISH LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**

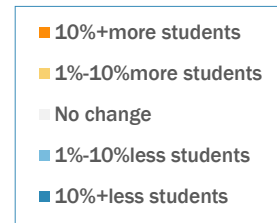


n=286

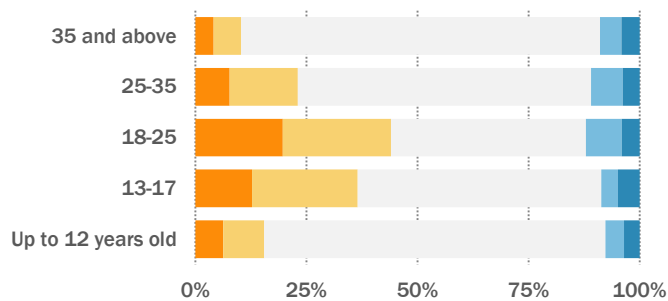
**DEVELOPMENT OF STUDENT NUMBERS FOR FRENCH LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**



n=174

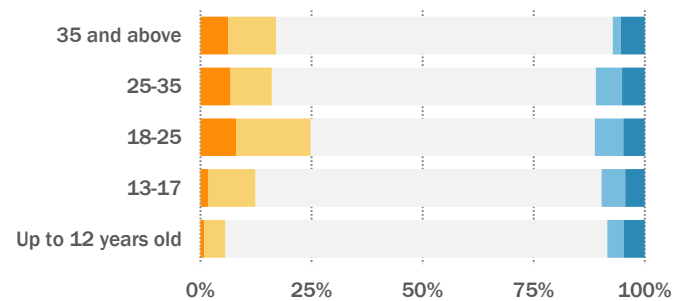


**DEVELOPMENT OF STUDENT NUMBERS FOR GERMAN LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**



n=173

**DEVELOPMENT OF STUDENT NUMBERS FOR ITALIAN LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**

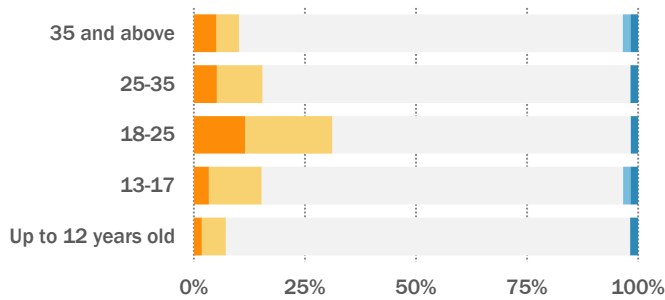


n=125



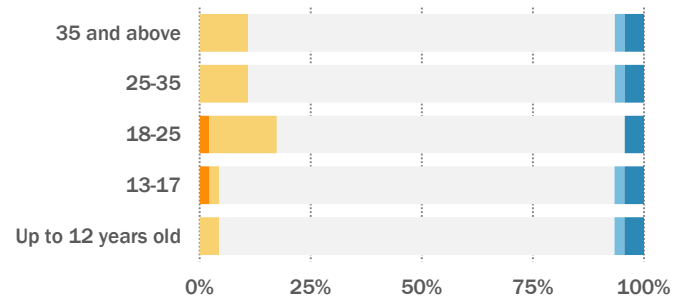
International Association of Language Centres

**DEVELOPMENT OF STUDENT NUMBERS FOR JAPANESE LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**



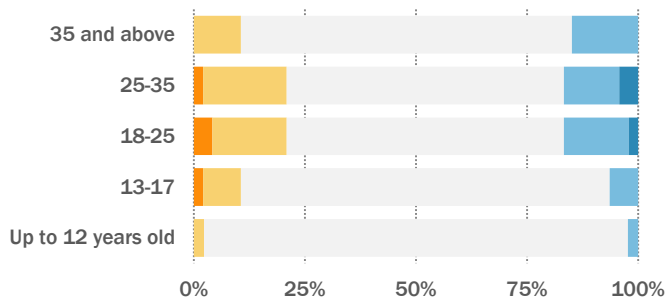
n=61

**DEVELOPMENT OF STUDENT NUMBERS FOR PORTUGUESE LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**

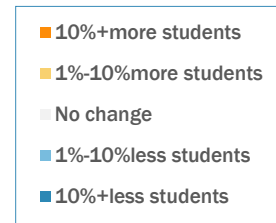


n=46

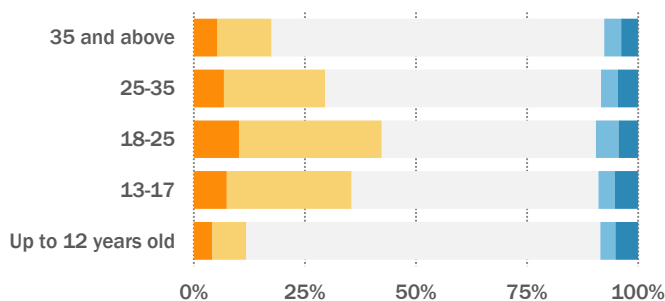
**DEVELOPMENT OF STUDENT NUMBERS FOR RUSSIAN LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**



n=48



**DEVELOPMENT OF STUDENT NUMBERS FOR SPANISH LANGUAGE COURSE BY AGE GROUP (2012 VS 2015)**



n=137

In English learning abroad, the young adult age group grew the most (18-25 years). However, education agents reported growth of English courses across all ages, making English the language with the most dynamic development in demand.

When it comes to other languages, the increase is predominantly in the 18-25 age group, with German and Spanish representing the next highest growth levels (44% and 42% agents report growth in this age segment respectively).

For all languages measured, 25-35 year-old students – the so-called young professionals – comprise a similar share. The highest proportion of 35+ year olds were identified to be taking Italian and Portuguese language courses.



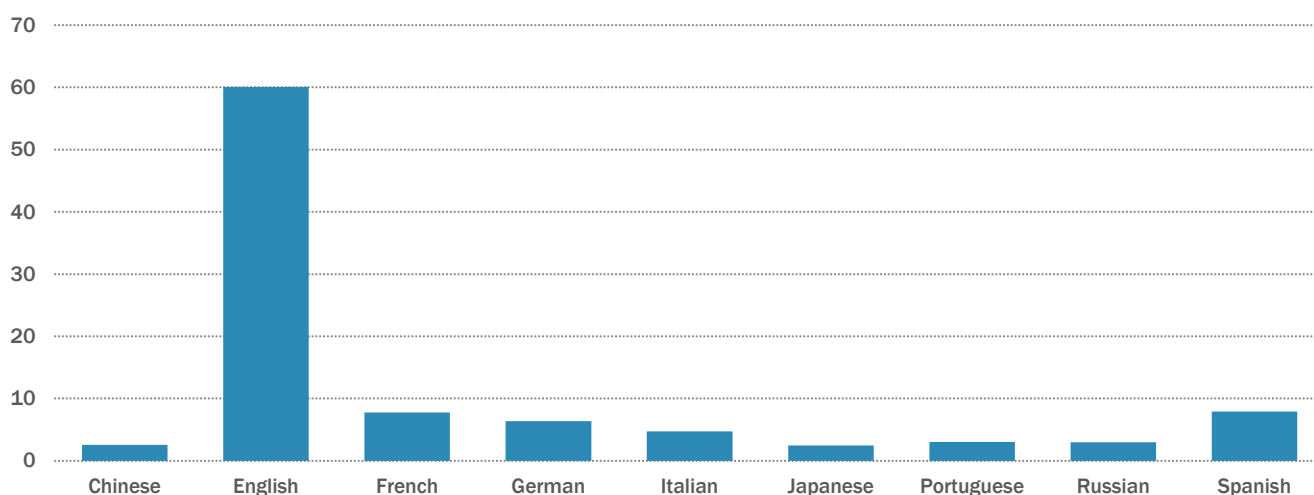
## TRENDS IN LANGUAGE LEARNING ABROAD

## Provider-agent partnership

The role of agents does not appear to be diminishing in the language travel industry. Personal approval and professional counselling is what students seek when deciding whether to travel abroad to learn a foreign language. However, it is noteworthy that the use of agents is not consistent for every foreign language learning market.

This report quantifies the different levels of engagement between agents and their partner educational institutions by looking at the number of schools represented, as well as average commission levels.

#### NUMBER OF PARTNER SCHOOLS THAT AGENTS PROMOTE PER LANGUAGE



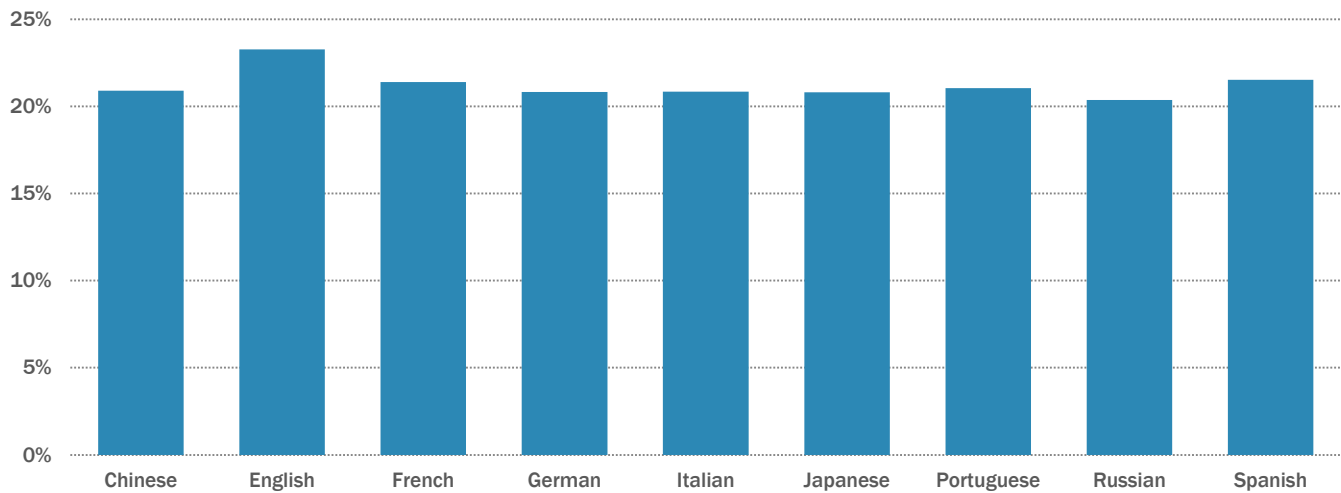
n=309

For English, results demonstrate the importance of agents in distributing the programme offering worldwide. On average, agents work with 60 schools teaching English, which is the highest number, compared to other languages. This is also due to the fact that English is being learnt in 8 major destinations with the overall supply being made up of some 1,900 language schools (in comparison, there are 326 language centres teaching French to international students).

The smallest number of partner schools was identified for Japanese, where agents currently represent an average of 2 language schools.



### AVERAGE COMMISSION PER LANGUAGE (IN %)



n=302

The average commission on tuition does not differ significantly by language. Agents on average receive a 21.5% commission from any foreign language course.

English, representing the most mature segment and, as was shown earlier in the report, by far enjoying the highest density of school-agent partnerships, consequently exhibits higher commission levels – averaging out at 23%. By contrast, agents reported lowest commission for Russian language courses.



# CHAPTER 3

## TRENDS IN DOMESTIC LANGUAGE LEARNING



Domestic demand levels for particular language learning form a foundation for the need and demand for language training abroad.

The research initiative, therefore, looked for domestic demand development in order to capture domestic market trends and be able to estimate future demand for language training abroad per language.

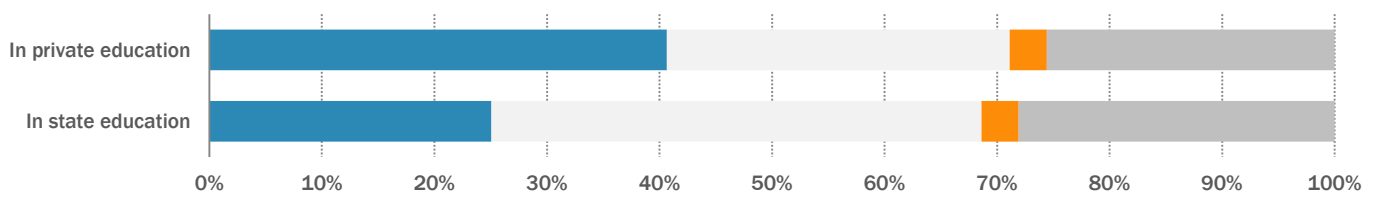
Thus, education agents were also asked about developments in domestic language learning in their home countries.

Domestic demand for language learning was investigated through public and private education provision, as it is especially language training in private language courses that encourages, or indicates, more demand for learning the language abroad.

With the exception of Portuguese and Russian, at least 20% of responding agents observed an increase in the demand for private language schools in their home country.

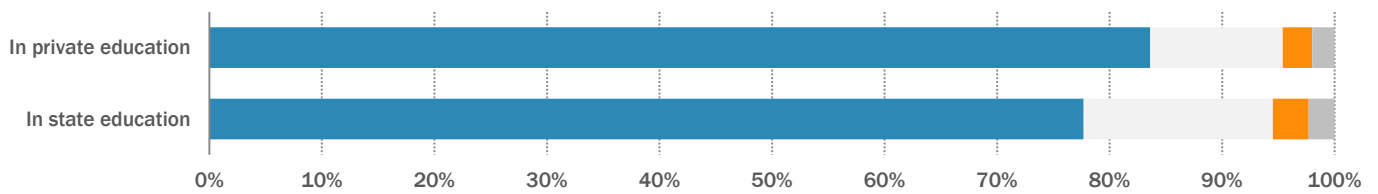
The highest growth was noticed in English, with 84% of agents pointing to increased demand in private education. German, Chinese and Spanish followed (49%, 41% and 39% of agents respectively).

**DEMAND DEVELOPMENT FOR CHINESE LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



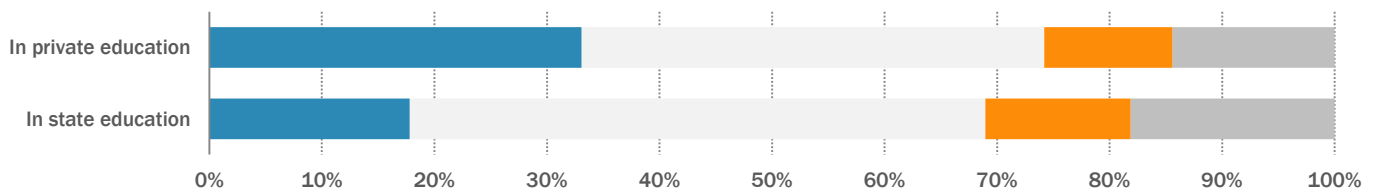
n=305

**DEMAND DEVELOPMENT FOR ENGLISH LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



n=310

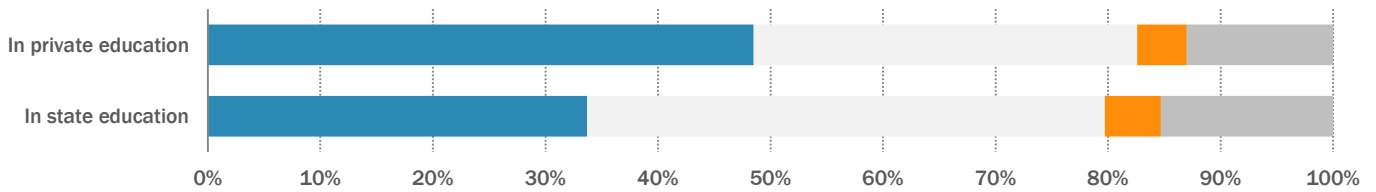
**DEMAND DEVELOPMENT FOR FRENCH LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



n=309

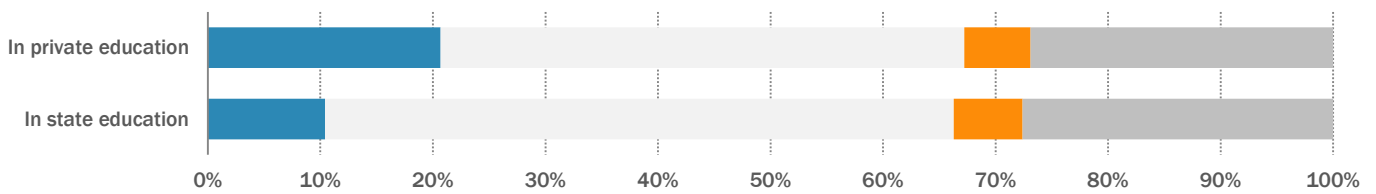


**DEMAND DEVELOPMENT FOR GERMAN LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



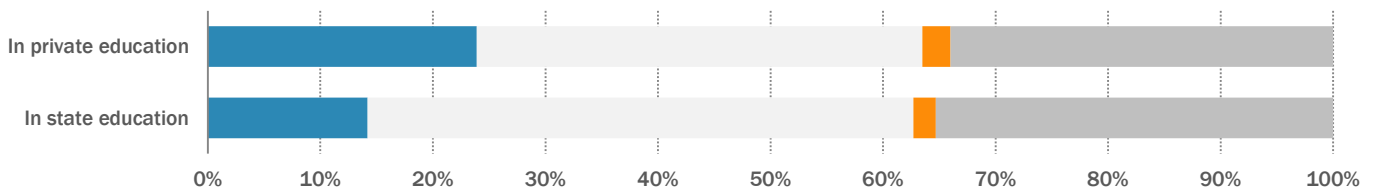
n=300

**DEMAND DEVELOPMENT FOR ITALIAN LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



n=297

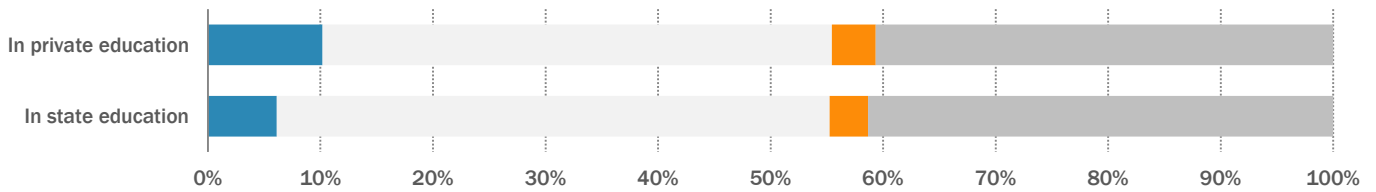
**DEMAND DEVELOPMENT FOR JAPANESE LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



n=295

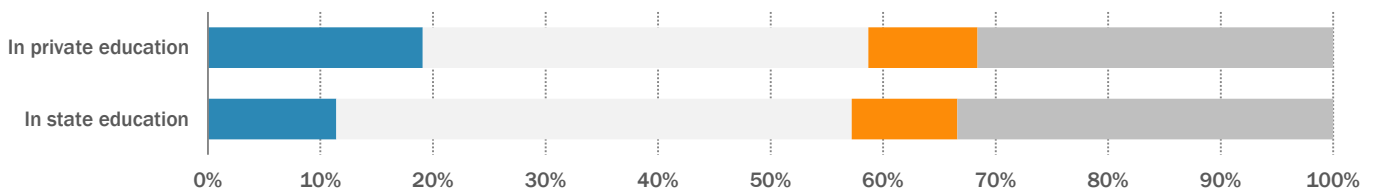


**DEMAND DEVELOPMENT FOR PORTUGUESE LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



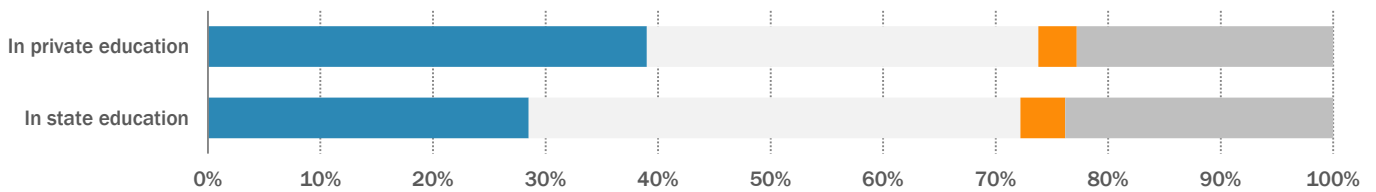
n=293

**DEMAND DEVELOPMENT FOR RUSSIAN LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



n=299

**DEMAND DEVELOPMENT FOR SPANISH LANGUAGE EDUCATION IN AGENTS' HOME COUNTRY**



n=302



# CONCLUSIONS

---

This report builds on existing knowledge about trends in demand for foreign language learning with new intelligence gathered from numerous sources including education agents – a cumulative intelligence that has not been available to language training providers or industry stakeholders. This study provides a reflection of the overall language travel market and elaborates on the similarities and differences of individual languages.

Based on the research results, the following conclusions can be drawn:

- Individual language segments are in different stages of maturity – in terms of demand levels, market measurement, umbrella associations, government recognition.
- Language travel is becoming increasingly interconnected with other sectors and preferences – international higher education segments, school trips with language tuition, internships + language programmes, etc.
- No major changes in terms of language preferences are expected over the coming years – demand for English learning abroad is slowing, but expected to continue growing, while other languages are expected to grow faster.
- The industry is headed toward multilingualism, which represents an opportunity for non-English providers. Students are increasingly taking on a second or further foreign language to stay ahead of their peers. Based on the insight provided by agents, new uptake in German, Chinese and French as the most popular third language may be anticipated.
- The purpose of learning a foreign language abroad is moving away from personal reasons (fun, desire to learn the language, travel component), towards career reasons (current or future studies, employment prospects).
- Structural changes in product offering can be expected – aimed more towards junior age groups. The under 18 age group is already more noticeable in English and overall, the number of juniors is predicted to grow for other European languages as well. Therefore, language schools catering for these languages need to be prepared for a change in product.
- As far as the provider-agent relationship is concerned, the study shows that the English language segment is already saturated, with agents promoting 60 schools on average. There is significant room for new partnerships between non-English language centres and education agents.







# NOTES

---



