Youth Tourism in South Africa: The Case of Language Travel

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ABSTRACT

Language travel has become a growing industry under the youth travel umbrella. Key destination countries such as Australia, USA and the UK have recognised this industry as a significant contributor to their tourism economy. Despite these initiatives to actively develop language tourism as a major incoming market, little attention has been paid to language travel in research, especially in South Africa. It is shown that language schools are unevenly distributed across the country. In South Africa, the Western Cape (Cape Town in particular) dominates the local language travel industry, followed by Gauteng. The study analyses the organisation and development of the language travel industry in South Africa as part of the country's youth tourism economy. It is shown that considerable differences exist between coastal language schools and inland schools. Although both operate in the same industry there are marked differences in operation and source markets for students. This report explores South Africa's language travel industry in terms of its position in the global language travel industry, its development, size, key role players, structure, operation, and significance for the greater South African tourism economy.

DECLARATION

I declare that this research report is my own, unaided work. It is submitted for the degree of Master of Arts by coursework in Tourism Studies at the University of the Witwatersrand. It has not been submitted before for any degree or examination at any other university.

Maisa Correia ________________________

Date ________________________

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CHAPTER 1: INTRODUCTION

1.1 Context

Until recently, little acknowledgement was given in tourism scholarship for issues surrounding the youth travel market (Carr, 1998; Rogerson, 2010). Richards and Wilson (2005: 39) recognise that "youth travel has long been seen as the poor relation of international tourism" but has recently attracted a lot of attention due to the growing desire for travel among the youth as well as their increasing spending power. Studies of youth and student travel have shifted from the "sociological and anthropological studies of 'wandering' and 'drifting' youth in the 1970s towards youth and student travel as a mass global phenomenon, which is an increasingly attractive market" (Richards & Wilson, 2003: 8).

The youth market is a large and growing niche market that represents 20% of all international arrivals which is valued at approximately US$ 136-169 billion and is expected to rise to 300 million arrivals by 2020 (Jones, 2008; UNWTO, 2008). In addition to its substantial growth, young people are travelling more often, travelling to more destinations and are also spending more than any other group on international travel (Richards, 2008). This situation is echoed by Richards and King (2003: 1):

> *"Growth has been prompted by increased participation levels in tertiary education, labour mobility and overseas study programmes… and changing concepts of youthfulness. The blurring of distinctions between work, study and travel are leading to a hybridisation of youth travel motives. The cultural aspects of youth travel… including the desire to mix with other like-minded people is an aspect that merits particular attention by destinations interested in this market".*

Overall, the student market is one of the most underestimated youth markets globally. Student travel and activities add considerable economic value to the tourism offerings of student destinations. Böhm et al (2004: 4) predict that the "total global demand for international student places will increase from about 2.1 million in 2003 to approximately 5.8 million by 2020, with demand for places in the five so-termed MESDCs (Main English Speaking Destinations – Australia, Canada, New Zealand, the UK and the USA) forecast to increase from about 1 million to 2.6 million places". This means that there is significant growth potential for a market of young people and students as budget travellers that contributed US $17.6 billion in the academic year of 2008-2009 and nearly $20 billion in the subsequent academic year in the USA alone (Ketterer, 2009; Institute of International Education, 2010).

The economic contribution of the international student market also goes beyond tuition, living expenses and travel costs. One Australian study revealed that international students also generate a large VFR market in which approximately 70% of students surveyed expected "two or more friends and two or more family members to visit them in Australia" (Davidson et al., 2010).This situation generates spending that is in addition to the amount of $42 531 on average per annum spent by the student alone on tuition, living expenses, travel and recreational activities (Davidson, et al., 2010). Overall, there is a growing global demand for international experience, which is a personal ambition for most young people who travel in order to discover, study, volunteer, work or even learn a foreign language (Jones, 2008). The latter has surfaced as a particularly important market for key English language learning destination countries such as the UK, the USA, Canada, Australia, Malta, New Zealand (UNWTO, 2008: 69), and more recently South Africa.

Travel by younger generations thereforehas become increasingly significant in the global arena. This market is largely demanding a greater connection to the world and its citizens, searching for experiences that are more open-minded and flexible with a strong emphasis on experiencing other cultures and increasing their own knowledge. Such experiences provided by a more 'serious' leisure (Stebbins, 1982) also allow for personal growth (Wissot, 1970: 167) and correspondingly add a deeper meaning and greater value than more traditional forms of tourism. Simpson (2005: 447) describes this trend, when referring to the popularity of gap year programmes, as signifying attempts to "form new citizens for a global age… where emphasis is placed on young people's acquisition of global knowledge as governable subjects with market potential". This 'social respect' or acceptability associated with youth travel and its subsequent popularity has spawned an industry of companies offering such programmes. This development is a clear indication that meaningful youth travel or travel with an attached element of personal development is on the rise.

Language travel has emerged as a growing industry under the youth travel umbrella. Driving its growth is the fact that language learning increasingly has become a necessity in order to keep up with globalization processes as well as presenting opportunities for cultural exchange. The English language is the most popular language for language travellers. Graddol (2006: 14) estimates that the number of people learning English globally will increase massively to reach a peak of around 2 billion within the next two decades. Tourism planners and policy makers in several key destination countries for learning English, such as the UK, the USA and Australia, have recognised this industry as a significant contributor to their local tourism economy. The UNWTO (2008: 67) reports that "many countries are (in fact) now actively developing language tourism as a major incoming market". Nevertheless, despite this growing recognition, little research attention has been paid to language travel, especially in South Africa.

Overall, the language travel sector is acknowledged as a component of youth travel in South Africa and language learners represent part of the 'independent travel sector'.Smith (2009) reports that South Africa is a favourable destination for EFL (English as a Foreign Language) learners due to the country being affordable. Further, Smith (2009) reported that South Africa is fast becoming a better known EFL destination, largely due to the presence of the country's national association, EduSA (Education South Africa, formerly Eltasa). This association provides a common voice for associated English language schools in the country and aims to guide and grow the English language travel industry in South Africa. As national government in South Africa is beginning to consider the possible role of educational tourism as a form of niche tourism, the significance of understanding the language travel industry is becoming more apparent.

1.2 Aims and Objectives

The aim in this research is to address the gap in local knowledge concerning the workings of the language learning industry in South Africa. Against the backdrop of the lack of available local research, the purpose of this study is to investigate the development, size, scope, organisation and significance of the language travel industry in South Africa. It seeks to provide insight into the nature of the industry in the South African context and attempts to fill the information gap that exists nationally. The core objectives of this study can be stated as follows:

- To understand the current size of the industry in South Africa (i.e. the number of language schools and the number of English language tourists);
- To understand the scope of the industry (i.e. range of products available, length of stay, spatial distribution and concentration of language schools as well as the range of language learner origin countries);
- To analyse the organisation and structure of the industry; and
- To analyse geographical variations in the industry across the country, especially between the group of coastal language schools and those in Gauteng (particularly Johannesburg and Pretoria).

The secondary objectives of the research are to analyse the following issues:

- To profile language travel tourists in South Africa regarding their demographics;
- To determine the purpose of English language travel in South Africa;
- To determine the development of the language travel industry in South Africa
- To determine the key role players; and
- To determine the future growth potential of the South African language travel industry.

1.3 Methodology

The study uses a number of different research sources and methodological tools. The starting point for the research was a desk-based review of existing information on the state of the current international and local language travel industry. In addition, a data base was compiled of the national pattern of existing local language schools in South Africa. The database was prepared using an extensive internet search. The internet is a common source of information dissemination and marketing concerning language travel and also provides a platform for sales and bookings for travel and learning products. The internet search provided an essential tool for deciphering the size of the industry in terms of the number of schools offering language products as well as the range of products available.

Interviews are a key tool in understanding and making sense of this world and its people (Jennings, 2005: 99). This investigation into South Africa's position in the global language travel economy and the internal organisation and patterns in the industry was undertaken with the use of both semi-structured interviews and structured questionnaires conducted with key stakeholders drawn from the schools selected from the data base. A structured sample of 33 out of 52 language schools listed in the database was selected for detailed interview. This sample of schools represented nearly two-thirds (63.5 percent) of all existing language schools in the country. The schools were selected to represent the geographic spread of existing language schools across the country and included a cross-section of both coastal and inland language schools in South Africa. Core issues of concern addressed in the interviews were the development of the language travel industry, its size, key role players, structure, operation, and significance in the greater South African tourism context. Although some face to face interviews were completed, the majority of school interviews were conducted telephonically. The interview schedule is given in Appendix A.

A second set of interviews were undertaken with language learners. More specifically, semi structured questionnaires were conducted with a sample of students drawn from both coastal and inland schools. This sample was drawn from three coastal and two inland schools, which in total yielded 75 completed questionnaires. These student questionnaires were conducted on school premises on a face to face basis with the permission of the Directors of Studies and the assistance of the teachers. A variety of issues were explored with language learners in these interviews. The questionnaire is provided in Appendix B.

1.4 Report Structure

The report is composed of five sections of discussion:

- ***Chapter 1***provides the context for which the study took place and outlines the aims and objectives. The study draws from the international youth and educational markets and aims to understand South Africa's position therein. The chapter then outlined the methodologies used.
- ***Chapter 2*** looks at the international literature that explains how the language travel industry has developed over time. It is evident that limited literature exists on the topic of language learning and its connection to tourism. Existing scholarship has been drawn from areas such as youth tourism and educational travel, particularly with regards to the international student market mostly travelling for studies in higher education. Several governments have recognised the potential economic significance of educational travel promoting destinations as favourable for language study purposes but also for the opportunity to combine studies with wider travel.
- ***Chapter 3*** begins by discussing the language travel industry in South Africa in general. It then looks at the results from the language school interviews that were conducted with South African language schools, both coastal and inland. The findingsaddress the structure, nature and value of the industry as well as issues which language schools face.
- ***Chapter 4*** discusses the results of the language student questionnaires that were conducted, including language students from both coastal and inland schools. A profile of the students and their experiences in South Africa is presented.

- ***Chapter 5*** concludes the report, offering a summary of key findings and provides recommendations as to the future growth of the South African language travel industry.

CHAPTER 2: INTERNATIONAL LITERATURE REVIEW ON LANGUAGE TRAVEL

2.1 Introduction

Research on language travel is scattered across work in educational tourism and youth tourism. This chapter aims to provide an overview of the existing international literature, which has investigated various aspects of the language travel industry. The historical origin of the global language travel industry and how it has developed over time sets the context for understanding the various aspects of the industry. An analysis of the debates around defining language travel will follow with a brief discussion on the importance of motivation as a crucial factor in the growth of the global language travel industry. Further issues under consideration are the global language travel market, its growth, key challenges and the profiles of leading English language travel destinations.

2.2 Historic context of language travel

The need or desire to learn a foreign language in combination with travel has its roots in educational tourism, which dates back to the Grand Tour of the 1500-1600s and to the late nineteenth century, when leisure tourism formally emerged as a means of education (Benson, 2005: 135; Brodsky-Porges, 1981: 177; Ritchie, 2003: 10). As Brodsky-Porges (1981: 177) explains, "it was at this time that the practice of the upper-classes of sending their sons abroad as part of the educational scheme became successively an experiment, a custom, and finally a cultural norm". Such travel was restricted to the privileged few. Amongst other activities such as fencing, riding, dancing, or foreign affairs (Ritchie, 2003: 10), the acquisition of linguistic skills became an integral part of educational tours and was an indication of wealth and status.

Over time, educational travel progressed where a learning/travel continuum emerged that depicted a range between formal and informal educational travel. Towner (1996: 115) described this process as follows: “the spatial patterns of the Grand Tour passed through two stages; from a quest for a formal acquisition of practical training and social skills at specific educational centres to a broader and more informal social and cultural education that was best attained at the main courts and social and artistic centres in Europe”. Nevertheless, as Ritchie (2003) explains, this kind of travel was expensive and for the elite. Over time the tour became more accessible to the middle classes where “aristocratic standards of education began to give way, and enjoyment was the focus of travel abroad rather than education (and so) the “class” tour gradually became the “mass” tour” (Gee, Makens, & Choy, 1997: 26).

Modern educational tourism has evolved to include colleges and universities that offer opportunities to combine travel and study, and further diversified into other interest groups such as: school trips, language schools, nature-based and cultural educational programmes, adult and senior’s market (i.e. cookery, gardening and art classes for example) (Benson, 2005: 135). Boekstein (2010: 91) recognises that many more people are looking for holidays in which they can actively participate in something, which is more likely to be educational and can include anything from “wine tasting to environmental field studies, but increasingly it is learning a new language, particularly English.”

The proliferation of English has spawned the need for language courses. Although language learning encompasses a wide range of languages, English is undoubtedly the most sought out language for second language learners. It is a world language and as Yano (2001: 121) explains, has become so due to the advance of economic and political globalisation (see Crystal, 2003).Graddol (2006) however, warns that in futurethe strength of the English language may diminish as other languages such as Spanish, Mandarin, Arabic, Japanese, French and German become more prominent in the global arena. The English educational market therefore needs to be aware of such changes in demand for English language learning. Within the international economy of language travel and learning South Africa is a new destination. It has been argued that the country is fast becoming a popular English learning destination (Baker, 2004, 2008a, b, c, d). Notwithstanding its range of official languages,English language learning is the focusinlooking at language courses and language tourists for the purpose of this study.

2.3 Defining Language Travel

In their research Donaldson and Gatsinzi (2005: 19) recognise language travel under the educational tourism umbrella where “tourism and English are considered a powerful combination”. The Canadian Tourism Commission (CTC) identifies language travel within a “learning travel continuum” whereby language travel would be classified under “purposeful learning and travel” (Arsenault, 2001: 6). Here learning travel, which includes language travel, is described as follows: “… a magical mix of authentic, high-quality, learning opportunities allowing visitors to experience and interact with the cultural, historical and natural wonders of an area, attraction or event. This form of special tourism combines learning activities with enjoyable travel opportunities … (and) offers a socially satisfying, personally enriching experience” (Arsenault, 2001: 6).

The above definition highlights key elements of the language travel experience. Language travel includes the opportunity to be immersed in a foreign environment, being exposed to different cultural, historical and natural experiences while simultaneously increasing and developing one’s knowledge and linguistic skills, therefore enriching what would have been just a normal, almost ‘touristy’, travel experience. Kennett (2002) considers language learners to be part of cultural tourism, noting however that despite sharing some of the characteristics of experimental and existential tourists in finding comfort in another culture, as discussed by Cohen (1979), their physical and psychological base remains entrenched in their home culture.

2.4 Language Travel Motivation

While some research has been done on the motivation to learn a language, particularly English (Chen, Warden, & Chang, 2005; Gardner, 1968, 1985; McDonough, 2007; Noels, Pelletier, Clement, &Vallerand, 2003; Oxford &Shearin, 1994; Peirce, 1995; S. Ryan, 2006, among others), the motivation to travel for the specific purpose of learning another language has been neglected.

Motivation to learn a foreign language could be driven by a variety of reasons such as the desire to be exposed to another culture within its own habitat, to improve one's marketability within a country's workforce, to gain entrance into a reputable foreign tertiary education institution, or to simply improve one's linguistic skills (see Rubenfeld, Sinclair, & Clement, 2007). It is, however, the element of travel that gives a deeper meaning to learning a new language. Faye (1940) affirms this and points toa translationof a well-known French proverb that states that "travel helps the youth to develop".

Overall, it is important to consider language traveller motivation as it shedslight on the reasons behind offering a particular tourism product or service. In the South African context, little is known about why language tourists have chosen to learn a particular language in the country and what they prefer to be added to their language packages. Thus, including motivation in the research provides an insight into the kinds of products and services that the industry is and/or should be offering.

2.5 The Language Travel Market

2.5.1 The Global Language Travel Market

The language travel market has become an important niche tourism market, in particular for many English, Spanish and French speaking destinations in recent years. These languages currently dominate the market but are likely to face some competition from languages such as Chinese, Japanese, Arabic and German that are gaining popularity and importance globally (Graddol, 2006; Richards, 2009).

The far-reaching economic impact of language students on tourism spending and in the broader economies of destinations has gained considerable recognition of late. It is a global trend that many language students often stay in local communities such as in the case of the use of home stays, and thus “spend money directly with local suppliers, increasing the economic impact of their stay” (Richards, 2009: 6). They are also likely to stay for longer periods of time, effectively spending more in total than other tourist types (Son, 2002: 235). Visitation from friends and families during their stay also adds to their growing economic impact.

According to Richards (2009: 1), “language travel is a high-value market which injects money directly into the local economy. The total value of the language travel market can be conservatively estimated to be US $8 billion a year (or almost 7% of the global youth travel market)”. In a report by the Language Travel Magazine, the estimated value for the language travel market for 2009 is over US $11.7 billion, which is an 8.5% drop from the previous year due to the effects of the global economic crisis (Norris, 2010: 50). These figures are difficult to confirm as statistics are limited due to the poor record keeping of some language travel destinations where the language travel industry has not yet been properly or sufficiently recognised and recorded by governments.

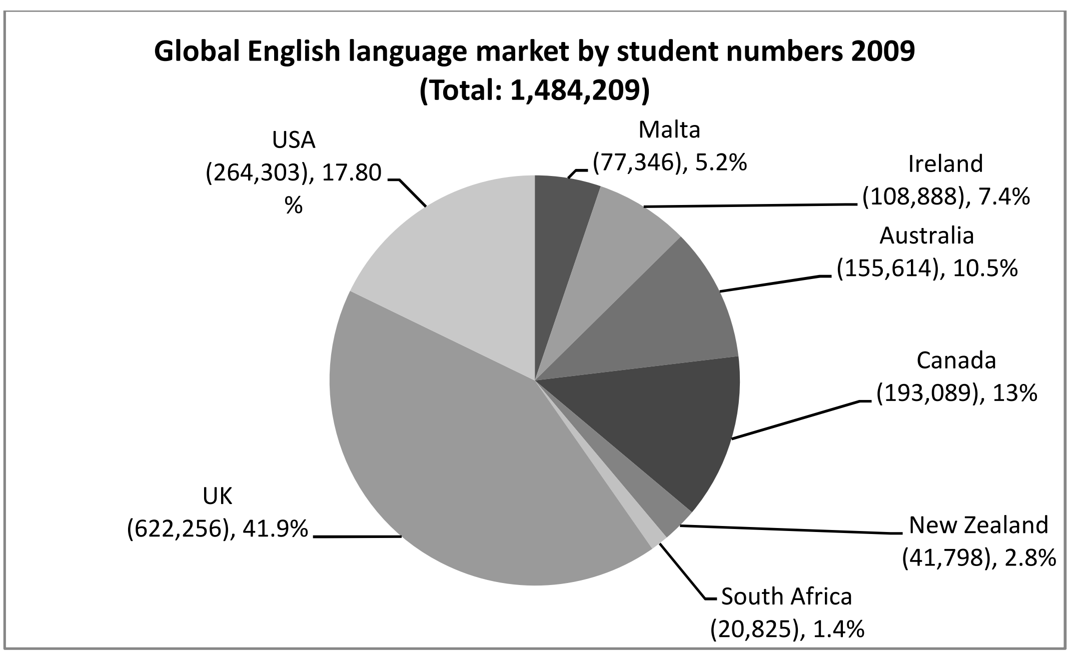


Figure 2.1 Global English language market by student numbers, 2009 (adapted from Norris, 2010: 51)

Figure 2.1 provides what might be described as the best available estimates of the global English language travel market. In 2009 Norris (2010) records there were nearly 1.5 million language students worldwide. The largest share of the global market for English language learning was accounted for by the dominance of the UK (41.9%). The USA emerges as the second largest English language travel destination with 17.8% of the global market share.This is followed in descending order by Canada (13%), Australia (10.5%), Ireland (7.4%), Malta (5.2%), and New Zealand (2.8%). The position of South Africa is that it ranks eighth in the global language learning economy with an estimated market share of 1.4%.

Despite the recent economic and financial crisis, it is estimated that the global language travel industry has performed slightly better than the international tourism market in general (Richards 2009). This performance is largely accounted for by the proactive responses of language travel organisations, being innovative about the way they do business where many organisations looked for “new partnerships and opportunities, seeking diversification, or increasing their marketing activities“ (Richards, 2009: 2).

2.5.2Key Issues in language travel

As with any industry, the global language travel industry faces certain challenges or barriers to growth, which vary extensively within each destination. Nevertheless, there are certain common challenges that occur across the industry. These challenges are expressed by Richards (2009: 7-9):

- ***Visas:*** The existence of strict visa regulations including lengthy and expensive interview processes may discourage students from certain language learning destinations. Strict visas may result in learners choosingan alternative destination with easier and more affordable entry requirements. Language school associations often struggle to gain the support of governments in easing these processes. In some instances, it is compulsory for language organisations to be accredited in order to be on a list of reputable organisations which are recognised by governments for the issuing of visas.Connections to other visas such as working holiday visas in New Zealand, for example, have created other avenues for students to study English and for longer periods of time.

- ***Quality:*** Concerns about quality often are linked to the issuing of visas whereby many destinations require schools to be accredited before a student may be issued with a visa to study at a language school. This has resulted in the creation of associations where schools may gain more rapport within the language training industry. Schools have also turned to offering their own accommodation in attempts to further legitimise their products and add more value to their offerings. The movement towards accreditation has resulted in a more formalised system and the creation of associations which look after the interests of language travel organisations.
- ***Expansion and consolidation:*** The growth of language travel has fostered the emergence of many language schools that have expanded internationally and formed major global recognisable brands. International branches have allowed schools to gain considerable recognition among agencies that source students and thus allow them to grow and maintain market share in their respective destinations.
- ***Government support for language learning:*** In some countries, the growing economic importance of language travel has prompted governments to develop policies to assist the growth of language learning and the impacts which it has on tourism and higher education, as well as other economic sectors.
- ***Diversification:*** Product diversification has become important in the face of competition both locally and globally from the growing number of language, accommodation and travel service providers. Many schools have branched into areas related to youth travel with working holidays, adventure and volunteering being popular 'English plus' options. Such diversification allows language travel organisations to attract an array of students, thereby increasing their economic contributions.
- ***Marketing:*** The internet has allowed for a wealth of information to be available to prospective language students. Comprehensive online databases allow students to view numerous course types and locations at one central point, making destination selection

easier and quicker. Students can also see the experiences of other students through social media such as that of Facebook, Twitter, and MySapce, where word of mouth is a crucial decision-making factor.

2.5.3 Profile of leading destinations in language travel

This section provides a brief description of South Africa's major competitors in the global economy of language travel and learning. More specifically, it reviews and profiles issues relating to the following destinations in the English language learning and travel economy: the United Kingdom (UK), Ireland, USA, Canada, Australia, New Zealand and Malta.

2.5.3.1The UK and Ireland

The UK

As the birth place of the modern English language, the UK has an obvious appeal and competitiveness for language travellers. Marketing for the United Kingdom highlights the "picturesque countrysides of Scotland and Ireland" as well as the "warm and friendly" nature of locals in order to attract English language students to the UK (Baker, 2008a; Norris, 2008a). User friendly and affordable transportation networks in Europe and the perceived high quality tertiary education offerings as a future option also make the UK an appealing destination for European students looking to learn English.In 2004, the economic impact of the English language travel industry in the UK was estimated to be valued at £1400 million (Richards, 2009). The UK received around 600 000 international English language students in 2007. By 2009 the UK enjoyed the largest market share of the global industry (Norris, 2010). In terms of sources it was recorded that the UK attracted an important share of its English language learning market from Italy (12.8%), Korea (12%) and Japan (11.4%)(Norris, 2008b).

The UK English language travel industry is not without its problems, however. One of the most significant developments in the industry to date has been that of the tightening of visas by the UK government. The new rules for the issuance of student visas saw language schools wanting to source students from countries that require a visa for entry, having to be “licensed by the UK Border Agency (UKBA), accredited and on the sponsors register”as reported by Smith (2009). Students would also have to prove that they could sustain themselves for the duration of their stay (i.e. havesufficient funds to cover their tuition fees and living expenses), as well as already reached a level of proficiency based on evidence of a proven track record of education.

The new visa regulations have angered language schools, particularly those which are small and un-accredited, as well as international agents whose clients are now selecting alternative destinations. English UK (2010) issued a press release to echo the sentiments of providers, stating that the changes have cost the British economy £600 million a year. It was argued that if changes were not enacted then the strict rules for visas and entry into the UK would hamper the growth of the further education and training industry, including that of language travel (English UK 2010).

Ireland

Ireland has emerged as one of the biggest competitors to the UK with regards to the English language travel industry. Research undertaken by Indecon International Economic Consultants (2007) on behalf of FáilteIreland provides a profile of the country’s English Language Learning Sector for 2005. According to the report, the English language sectorresulted in an estimated 103 000 students coming to Ireland to learn English betweenApril 2005 and March 2006. The most important source markets for Ireland are Italy, Spain, France, Germany and a number of Asian countries. European students outweighed the other source markets with a 74% market share, with Italy making up Ireland’s single largest source market.

The use of agents and word-of-mouth proved to be vital tools in recruiting language students to Ireland. Students were predominantly young, with 68.5% below the age of 24 and 42% between the ages of 19 and 24. The gender profiles were evenly split, with females making up the slight majority (54%). The average length of stay was 3 weeks for students 17 years old or younger and 8.7 weeks for students 18 years or older. It was argued that Ireland attracted English language students due to its perceived friendliness of its people, levels of personal security and popularity gained from the success of several famous music bands (Westlife and U2) and performers (Riverdance), as well as its perceived quality of EFL education and its membership of the EU, making entrance into the country easier for Europeans (Indecon, 2007).

2.5.3.2USA and Canada

USA

The USA is a key player in the industry of global language learning. As a large country and among the world's leading tourism destinations the USA has many potential bases for marketing itself as a competitive destination for English language learners. Amongst its diverse attractions for language learners are choices in activities to be attached to language courses from skiing, to beaches, water sports, history, landscape, as well as the tourist draw card of Hollywood. Cities such as New York, Washington DC and the states of California and Texas are popular among students, attracting the majority of international English language learning students to the USA.

The international educational industry is a crucial contributor to the US economy. The country generated a total of $18.8 billion in the academic year of 2009/2010 from the international student market for the educational sector as a whole. The US government recognises that Intensive English Programmes (IEPs) are "the gateway to US higher education", which essentially feeds into a bigger economic opportunity for the country (American Association of Intensive English Programs, 2003). Nevertheless, as a consequence of the 2001 terrorist attacks and 2003 SARS outbreak, the US government tightened visa restrictions and lengthened process times, making it more difficult for students to enter the country. Accordingly, it is observed thatthe "US higher education industry is lobbying the administration to improve visa processing by allowing embassies more discretion to waive visa interviews and issue visitor visas for short-term language students" (Indecon International Economic Consultants, 2007), making it a less painful process. Such regulations in turn confuse both the language service providers as well as students who may choose an alternative competing destination for studies.

Despite visa issues, between 2003 and 2005, the USA attracted language students particularly from Japan, South Korea, Taiwan, Saudi Arabia, China and Brazil (Indecon International Economic Consultants, 2007: 112). Student numbers experienced a decline with the global economic downturn in 2008/2009 but are slowly back on the rise, largely due to aggressive marketing efforts (Hancox, 2010).

Canada

Another emerging destination for English language learners is Canada. According to one Language Travel Magazine (2010) survey, the most prominent nationalities of international language students in Canada are Koreans, Japanese, Saudi Arabians, Brazilians and Mexicans. A 2004 study by the Canadian Association of Private Language Schools (CAPLS) revealed that the top five reasons for international students choosing to study a language in Canada were its reputation as a "safe destination to visit", "value for money", it being a "great place to live", its "beautiful natural landscape" and the "high quality of education" (cited in a report by Indecon International Economic Consultants, 2007). Language students are also attracted to Canada due to its range of water-oriented activities, ski slopes and overall friendly nature of locals (Hancox, 2009).

After the 2001 9/11 terrorist attacks in the US as well as the 2003 SARS outbreak, Canada also experienced a decline in its international language student numbers and income (Evans, 2004: 17). It was observed that students were afraid to travel to large centres such as those in Toronto and so either chose an alternative destination or took up the "enhanced opportunities for language study at home," (Evans, 2004). Despite these obstacles, with a market share of 13% or 193 089 English language students in 2009 (Norris, 2010), Canada constitutes an important playerin the global language travel industry. One report by Roslyn Kunin& Associates (2009) revealed that short-term foreign students in language training programmes in Canada contributed “an additional $746 million per year in total spending to the Canadian economy, (which) is equivalent to about $509 million in GDP, 13 210 jobs, and $36 million in government revenue”. The same report states that in terms of Canada’s total educational industry, which includes language courses, an estimated “$285 240 000 per year can be attributed to additional tourism related activities, including international students and their family and friends”.

Languages Canada (2009) report that according to the Conference Board of Canada, “Canada’s language training sector is a $1.5 billion industry”. In surveying its members, Languages Canada established that they trained 103 293 students in 2007, equating to 1 063 137 student weeks with at least a $745 million economic contribution including spend on tuition, accommodation, meals, retail and other activities.

2.5.3.4Australia and New Zealand

Australia

Pearce & Son (2004) highlight that Australia is a popular country for educational travel as a whole. Further, within the international education sector the promotion of English language learning is recognised as important. Indeed, it is made clear that of all kinds of educational tourists to Australia the English language students are of particular interest because “they are the most like pleasure travellers”(Pearce & Son 2004: 342). This characteristic is confirmed by Blundell (2009: 8) who points to language students “for whom tourism activities are an integral aspect of their program” within Australia.

Tourism planners in Australia recognise the importance of educational tourism, and that it is a form of tourism that is expanding especially since the year 2000. One estimate is that over 45% of the growth in expenditure from all international visitors to the country is a result of international education visitors (Jackson, 2009: 18). Further it is predictedit is “likely that nonleisure travel will grow faster than leisure travel out to 2030" and that "it will be important for the tourism sector to factor the opportunities provided by business, education and employment tourism into its planning" (Jackson, 2009: 18).The study pathways of international students in Australia mean that even ELICOS (English Language Intensive Courses for Overseas Students) students are likely to return in order to pursue tertiary qualifications, thus further increasing the potential long term economic value of the education tourism market (Australian Education International, 2006). Most recently, the work of Blundell (2009) highlights the importance to Australia of capturing market share of the expanding global industry of language travel.

As an English speaking country Australia has unique competitive advantages for language travellers. Blundell (2009: 10) records that in 2008 160 000 new English language students came to study in Australia. This is confirmed by an Australian ELICOS market study which revealed that in 2008 total ELICOS enrolment numbers stood at 162 114, which marked an 18% increase from 2007 (Environmetrics, 2009). The same report also revealed that Australia's ELICOS market had doubled in size since 2003, which indicates a rapidly growing market and industry. However, a different study by the Australian government reveals that ELICOS student numbers for 2008 stood at 115 173 and 119 960 in 2009, representing a 4.2% growth. The conflicting statistics for 2008 may be due to the fact that students may also be simultaneously enrolled for studies in another educational sector such as in Vocational Education and Training (VET), higher education or schools, therefore making precise statistics difficult to discern.

Australia's biggest ELICOS source markets are Brazil, Thailand, Vietnam, the Republic of Korea, and China, largely due to geographical proximity as a 'pull factor' (Mazzarol&Soutar, 2002: 82) and great demand for English language learning, particularly from Asia. In particular, Brazil represents one of the most important expanding markets for the ELICOS industry in Australia (Blundell 2009). By 2009, Brazil made up 57.6% of the total Australian ELICOS market (Australian Education International, 2010). The Brazilian economy has been thriving even in the face of the tough global economic climate. Brazilian students are traditionally mobile, especially regarding travelling to study in destinations such as the USA, Canada, the UK and Europe and understand the importance of learning languages where the “mobile class… invests in sending young people abroad for intensive language programmes” (Australian Education International, 2009). Other significant source markets for Australia are Japan, India, Indonesia and Colombia, thus indicating a strong pull from Asia and South America (Blundell 2009). The share of Europe has dropped correspondingly as regards English language learning.

The choice to travel to study English in Australia is largely due to its reputation for offering high quality educational programmes. The combination of English language courses and other activities such as water sports, work experiences,(Language Travel Magazine, 2007; Norris, 2009), local excursions, beach sports such as volleyball and soccer, nightlife and social networking has also contributed to the popularity of Australia’s English language learning market.

New Zealand

For English language learners New Zealand has the appeal of a natural beauty that can be combined in various ways but particularly in attracting those who are looking for a more adventurous stay while learning English. The country is well known for its “awe-inspiring scenery” (Evans, 2010) but also for its adventure sports offerings such as bungee jumping, sky diving, or abseiling. Quality education and having a lower cost of living than other English language learning destinations such as the USA, UK and Australia also makes New Zealand an appealing destination for language learning.

Although New Zealand receives only a fraction of the student numbers compared to Australia’s statistics, it is still a growing English language learning destination with a 2.8% share of the global market. According to a recent study by Statistics New Zealand (2010), the year ended March 2010 saw a total of 41 798 international students enrolled in English language courses in New Zealand, which was a 13% rise from the previous year.Language schools earned $140 million in tuition and related fees (a 1.5% drop from the previous year).

A trend towards short courses by two of the most crucial source markets (South Korea and Saudi Arabia) resulted in the drop in tuition earned from these markets. Currently, it is revealed that New Zealand's top source markets are South Korea, Japan, China (see Ryan & Zhang, 2007), Saudi Arabia, Brazil and Thailand in terms of student numbers but the Koreans and Chinese generally spend more and stay longer on average.

2.5.3.5 Malta

Malta has fast become a popular English language learning destination in the Mediterranean, attracting students mainly from Europe. According to FELTOM's (Federation of English Language Teaching Organisations Malta, 2008) website, the EFL industry in Malta began in 1963 when a group of about 30 Italian university students visited Malta for the purpose of learning English. Four decades later Malta received in excess of 86 000 students. In 1996 Malta became the first country in the world to regulate their language learning industry through government legislation, thus emphasising the importance of the industry (FELTOM, 2008).

The Malta Tourism Authority has released recent statistics (2010), which indicate that the country received a total of 68 918 students in English language specialised schools in 2009. The segment has grown by 5.8% since the year 2000. The share of students in total tourist numbers reported in 2009 is also 5.8%, which is 0.7% lower than the previous year. Malta's most popular source markets are Italy, Germany, Spain, France and Russia, which account for 72.4% of the total students. The summer months of July to September attracted the majority of students (57.8%) and the shoulder months of March-June and October showed a slight decline. The average stay of students on the Maltese Islands was 2.5 weeks, with a total of 172 245 student weeks recorded in 2009.

In terms of competitiveness and marketing, Malta enjoys the appeal of the Mediterranean where students are attracted to its rich ancient history, beautiful beaches, great weather and energetic nightlife (Evans, 2002). In common with Australia, Malta has also successfully combined English language courses with water sports (Baker, 2008b, 2008c) to attract a growing market of youth interested in adding to their language learning experience. Although already being popular among young adults as a language learning destination, Malta is also "increasingly becoming popular with older students with job-related learning goals" (Evans, 2005: 33), thus showing potential for differentiation and growth into broader markets.

2.6 Conclusion

Over many years the global language travel industry has developed from elitist quests in Europe to a mass market of international students travelling to destinations such as the UK, Ireland, USA, Canada, Australia, New Zealand and Malta. With its approximate $11 billion value, the global language travel industry has proven to be a key economic contributor to many leading destinations, further expanding the growing international higher education market and tourism.There is significant potential for the growth of language travel, particularly within the global youth tourism market. It is nevertheless without its problems, particularly with visas, quality and government support and recognition. South Africa is seeking to gain a foothold into this international tourism niche market. The next chapter reviews the current state and organisation of the English language travel industry in South Africa.

CHAPTER 3: ENGLISH LANGUAGE SCHOOLS IN SOUTH AFRICA

3.1 Introduction

South Africa is a recent new entrant into the global language learning industry. The sector has emerged only since the 1994 democratic transition as during the apartheid period youth travellers as a whole boycotted the country. Only after 1994 has South Africa emerged as a competitive destination for youth travellers as a whole and language travellers in particular. Considerable optimism has been expressed as to potential growth for language travel in the country.South Africa is considered a favourable language learning destination as it is perceived as being "cheaper than other countries" and having "fantastic wildlife, awesome scenery and welcoming people" (Evans, 2008: 68).

The aim in this chapter is to trace the development of the language travel industry in South Africa and its current state in the country. The discussion begins by examining previous research on the South African language travel industry and then analysing the results of the language school interviews that were conducted amongst 33language schools in both coastal and inland areas. These interviews were conducted during 2010 with the Directors of Studies and other management personnel and were designed to understand how the South African language travel industry is structured, how it has developed and the challenges which such organisations face in growing the industry.

3.2 The Organization and Scope of theLanguage Travel Industry in South Africa

Globally, international students in higher education tend to receive more attention by governments and policy makers as they are in a more traditional, formal and recognisable form of education. Nonetheless, the travel component of studies in foreign countries has now resulted in a "narrower category of travel that has education as a specific purpose.There are ‘tourism first’ segments of educational tourism, whereby travel is a primary motivating factor, and purposeful learning is secondary, and there are ‘education first’ segments as well”(Boekstein, 2010: 91). Language learning in a tourism contextdraws from both these segments but has a strong component of travel attached and “English language learning is probably the single most important purpose of educational tourism” (Smith & Jenner, 1997 cited in Boekstein, 2010: 91).

The only previous academic study on investigation of language learning in South Africa is the work of Boekstein (2010) who mainly focussed upon the Western Cape. This research extends the preliminary work of Boekstein by developing the national footprint of the language learning industry of South Africa. The research was based upon the initial development of a data set of language schools in the country which was internet based.Credible language schools in South Africa are relatively difficult to locate in the sense that only 17 schools (9 full members and 8 associate members) are officially associated with EduSA, which is the national association for educational tourism in the country, and are all coastal schools. These associated schools cater more for the European and South American market. The internet search revealed, however, a much larger population of language schools across the country.

In total it was revealed that in 2010 there were in operation 52 different language schools in South Africa. This figure excludes individual private tutors that are largely home based. It was shown that the language school sector is geographically highly concentrated. Two distinct clusters or regions for the language learning schools can be differentiated. These are the inland cluster around Johannesburg and Pretoria and the group of costal schools, mainly located in the Western Cape.

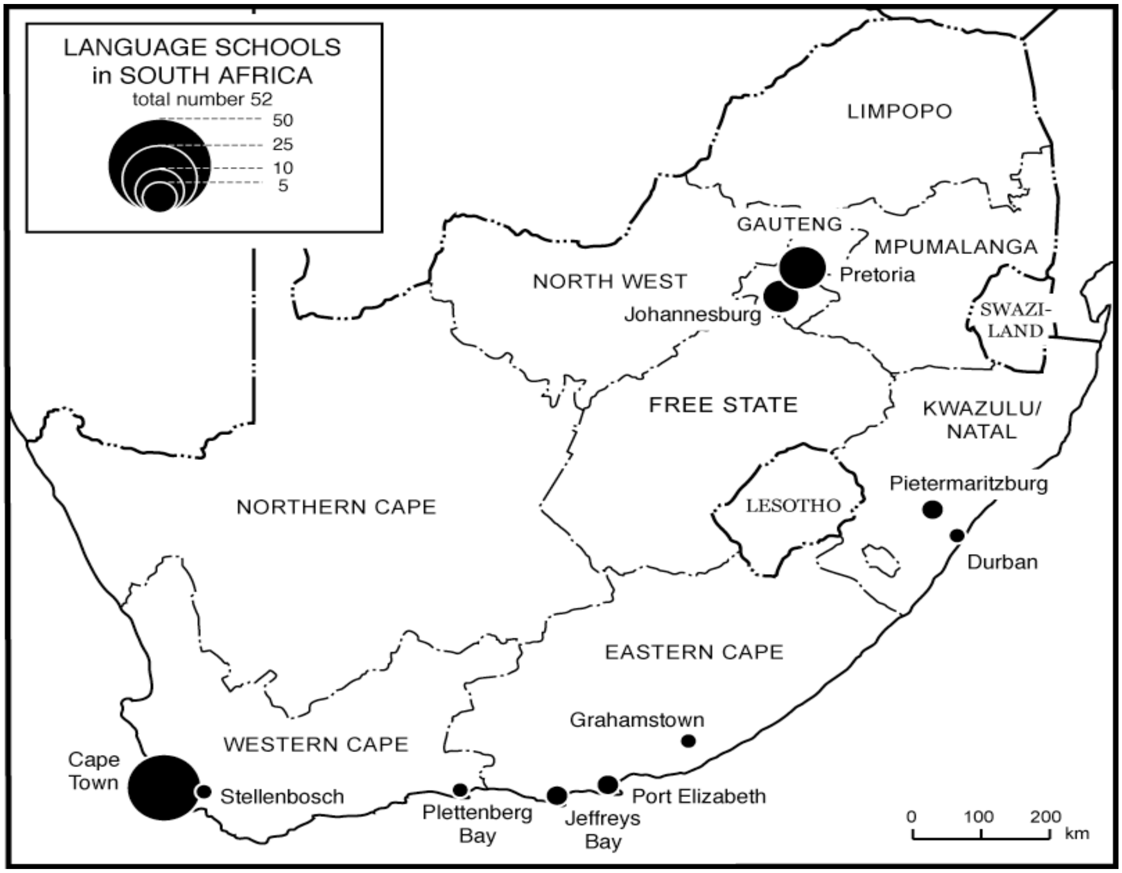


Figure 3.1 Geographic Distribution of South African Language Schools.

Fig 3.1 shows the spatial pattern of language schools across South Africa. It shows that the industry is concentrated in Cape Town (26), Pretoria (10), and Johannesburg (6). The rest of the schools are scattered along the west and east coasts of the country including Port Elizabeth, Jeffrey's Bay, Stellenbosch, Grahamstown, Plettenburg Bay, Durban and Pietermaritzburg. The dominance of Cape Town reflects its position as the capital of youth travel and leading destination for youth tourism in South Africa.Cape Town is the most popular destination for English language learners because of its "breathtaking beauty", with "so many diverse activities" and being "a melting pot of different cultures" (Evans, 2008: 67). Language students can learn English in Cape Town and combine their courses with activities such as visiting the wine lands where they can sample the variety of locally produced wines, go cage diving, whale watch in Hermanus, visit Table Mountain and Robben Island and even go on a Cape-based safari, among other tourism attractions.

Beyond the Western Cape, other existing coastal destinations for language learning are Plettenburg Bay, Jeffrey's Bay and Port Elizabeth. These locations are marketed to language travellers as offering the attractions of the beach as well as proximity to wildlife, opportunities for surfing and a "lower crime rate than other South African cities" (Evans, 2008). Durban is marketed also for its ultimate beach experience" and "tropical climate"which together make it a year round holiday destination. Other attractions marketed to potential language learners are opportunities for surfing, whale, dolphin and shark watching, the city's new marine theme park as well as "authentic" Zulu cultural experiences (Evans 2008: 67).

The marketing for inland locations seeking to attract language learners assumes a different focus. Johannesburg is described as "affectionately known as the Big Apple in Africa" with its other advantages touted as its proximity to other African countries and accessibility through the country's major international airport. The city is billed as "vibrant and bustling" and offering a variety of nightlife experiences. Language learners are to be attracted by the city's recent international exposure with the 2010 FIFA World Cup. Students are offered the opportunity to combine their language studies with visits to local attractions such as the Johannesburg Zoo, the apartheid museum, Gold Reef City and Soweto (Evans 2008: 67). Finally, the marketing for Pretoria is linked to its hub for international embassies and consulates as well as its status as the administrative capital.Once more, the marketing includes the city's attractiveness in terms of proximity to neighbouring African countries as well as accessibility through O.R. Tambo international airport.

An important finding of the research was the dual nature of the English language learning economy of South Africa. In particular, major contrasts emerge between the groups of language schools based inland in Gauteng as opposed to the group of coastal language schools. It was revealed that the coastal language schools attract very different markets and offer different tourism products to those offered in Johannesburg and Pretoria.Inland language schools in Pretoria and Johannesburg offer a range of 'diplomatic English' and 'business English' courses respectively that may not necessarily involve the immersion into the cultural, natural and historical aspects of the host destination. By contrast, coastal schools offer language travel products with a strong emphasis on programmes that have elements of travel, cultural and nature based activities, as well as socialisation activities such as “horse riding, beach picnics, soccer games, barbeques and visits to restaurants and pubs” (Boekstein, 2010: 91).

Although some prior research has been done in attempting to quantify South Africa’s language travel industry (see Boekstein, 2010), this investigation shows that the country initially presents a different situation to other leading international language travel destinations.The Western Cape, with Cape Town in particular, dominates the local language travel industry, followed by Gauteng. In contrast to other established language travel destinations such as the UK, USA and Australia, South Africa records an interesting dichotomy between the nature of the language travel industry and learners in the coastal centres as opposed to Gauteng. Further details of this dichotomy emerge from the interviews conducted during 2010 with a cross section of 33 language schools.

3.3 Language School Interview Results

In this section, the findings are presented from the 33 interviews with directors of language schools across South Africa. The number of interviews represents 63.5percent of all the national total of operating language school in South Africa during 2010.

3.3.1 Geographic distribution

The distribution of the sample of interviews is provided in Table 3.1. A deliberate attempt was made to obtain a cross-section of interviews to include both representatives of the group of coastal schools and the group of inland schools as represented by Pretoria and Johannesburg.

Table 3.1 Geographic sample of English language schools in South Africa.

City	Number of language schools in operation	Number of language schools interviewed
Coastal Language Schools		
Cape Town	26	17
Plettenburg Bay	1	1
Port Elizabeth	2	1
Stellenbosch	1	1
Jeffrey's Bay	2	2
Durban	1	1
Pietermaritzburg	2	1
Grahamstown	1	0
Inland Language Schools		
Johannesburg	6	4
Pretoria	10	5
TOTAL	**52**	**33**

As far as possible the number of language schools interviewed was selected to represent the geographical distribution of language schools throughout the country. Coastal schools made up just over 69 percent of the total, with 50 percent of the sample being located in Cape Town. Pretoria has almost double the number of schools in Johannesburg. At least half of every school in each of the cities indicated in Table 3.1 above were interviewed, resulting in a 63.5 percent sample of English language schools in South Africa.

3.3.2 Ownership

The research disclosed that there are two general types of English language schools in South Africa as regards ownership. First, are those that operate independently and second those that operate as part of a larger international organisation (usually) as a franchise.

Table 3.2 Ownership characteristics

Ownership					
Independent			**Language school chain**		
Coastal	83%		Coastal	17%	
Inland	89%		Inland	11%	
Combined	**85%**		**Combined**	**15%**	
Average years in operation					
Coastal	8.1 years				
Inland	9.3 years				
Combined	**8.1 years**				
Change of Ownership					
Independent			**International Chain**		
Coastal	**Yes**	5%	**Coastal**	**Yes**	75%
	No	95%		**No**	25%
Inland	**Yes**	0%	**Inland**	**Yes**	60%
	No	100%		**No**	40%

Source: Survey

Table 3.1indicates the ownership characteristics of language schools that were interviewed, such as whether they are independently run or part of a larger international chain of schools, their average years in operation and any change of ownership. It is evident that language schools were predominantly independently operated (85%) with only one branch/campus, with the exception of one school in Cape Town that had two campuses.Coastal schools were most likely to be part of a larger international franchise (17%) as compared to inland franchise schools (11%).

The recent nature of the language school industry in South Africa emerges from the finding that the average length of time that a school had been operating was 8.1 years. A striking finding was that the oldest language school had been established as far back as 1983 in the apartheid period. The vast majority of language schools, however, originated only after 2000. On average inland schools had been in existence for over a year longer than coastal schools. This indicates that the language travel industry is a relatively new phenomenon in South Africa. Ownership patterns were stable.None of the inland language schools interviewed had changed ownership since their existence. Coastal schools were more variable; with 5 percent of schools having changed ownership on at least one occasion since being established.

3.3.3 Employment

All the surveyed language schools interviewed employed staff in the same manner. Only management, administrative staff and some teachers were appointed on a permanent basis.The largest share of teachers were appointed on a temporary basis and often worked for more than one school at a time. A pool of part-time teachers was on “stand by”, where teacherswere recruited mostly through word of mouth and in some cases through the school’s own teacher training courses.

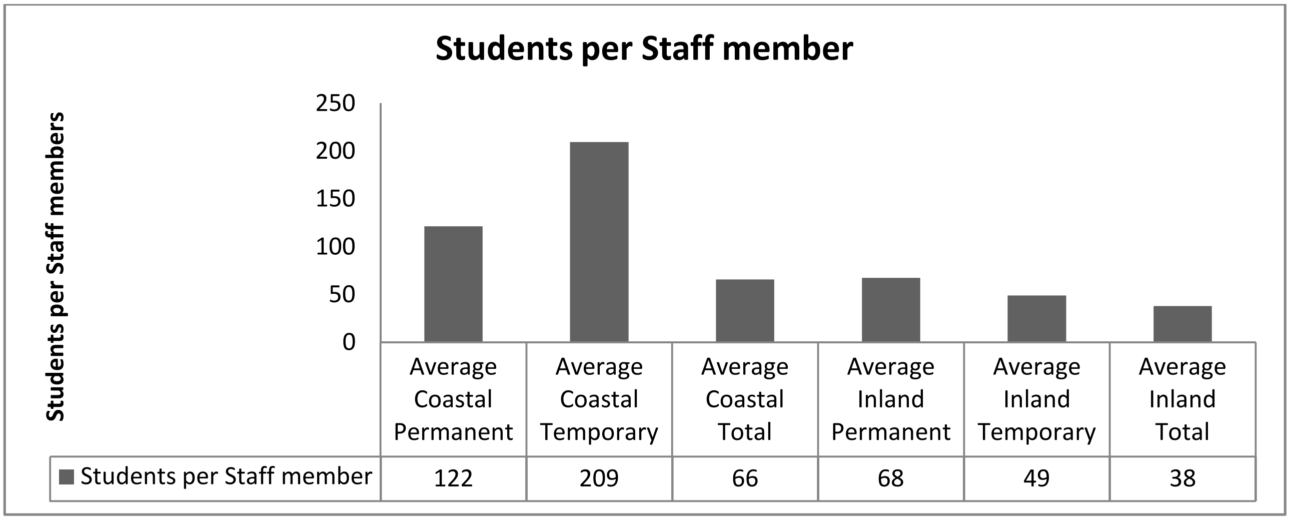


Figure 3.2 Student per staff ratio
Source: Survey

Figure 3.2 shows the findings in terms of numbers of students per staff member. It reveals thatcoastal language schools have a higher ratio of students to staff than inland schools. By contrast, the group of inland language schools tend to hire more temporary staff members and had approximately double the number of total staff members than coastal schools. Indeed, inland schools offer more employment opportunities and hire more people than coastal language schools, which is a mirror of South Africa’s current geographical employment distribution where the province of Gauteng is the biggest employer, with the highest number of economically active people in the country (Naki, 2009).

3.3.4 Course offerings

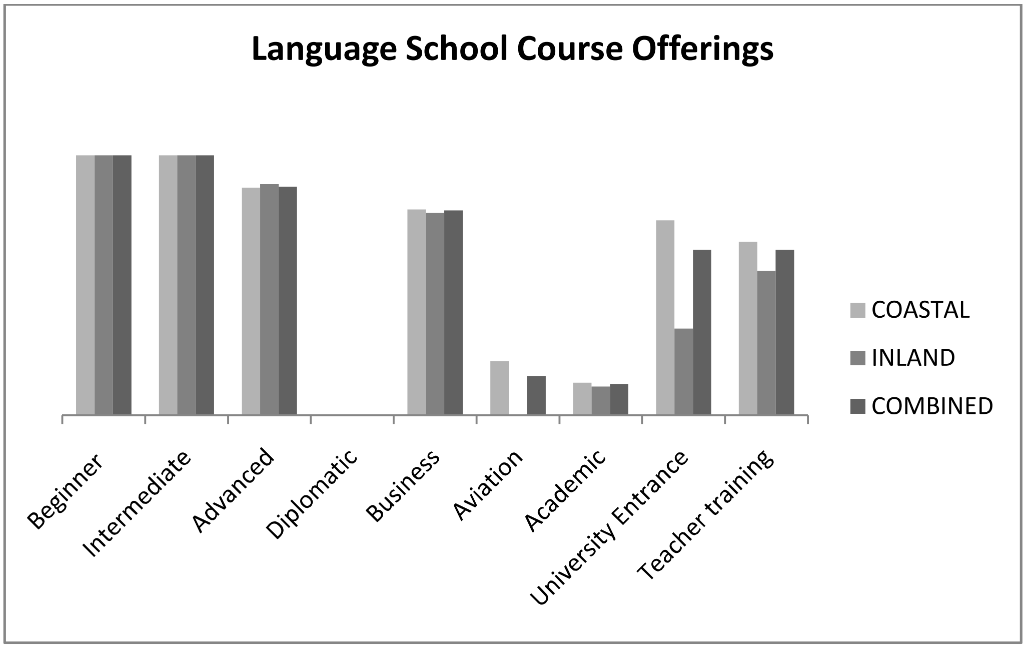


Figure 3.3 Language school offerings by type.
Source: Survey

The distribution and range of different language courses is shown on Figure 3.3. All language schools offered varying degrees of beginner and intermediate levels of English with only a few offering more advanced levels of English.

Although "Diplomatic English" came up on numerous internet searches as an offering particularly by Pretoria- based language schools, this type of course was said by interviewees to be ineffective and not popular. Business English was prominent in both coastal and inland schools, which tended to attract older students who were sent mainly by their companies to improve the English language skills. This type of English course was reported asparticularly popular among Brazilian and African students, particularly students from Angola. University entrance preparation courses for entry into international tertiary institutions, and teacher training courses weremore prominent among students at coastal language schools. One interesting observation was that relating to aviation English, which is a course that was only mentioned by coastal schools, where Saudi Arabian students were identified as the biggest market for such courses. Other industry-specific English courses offered, mostly by coastal schools, include those specially designed for the energy, oil, and health/medical industries.

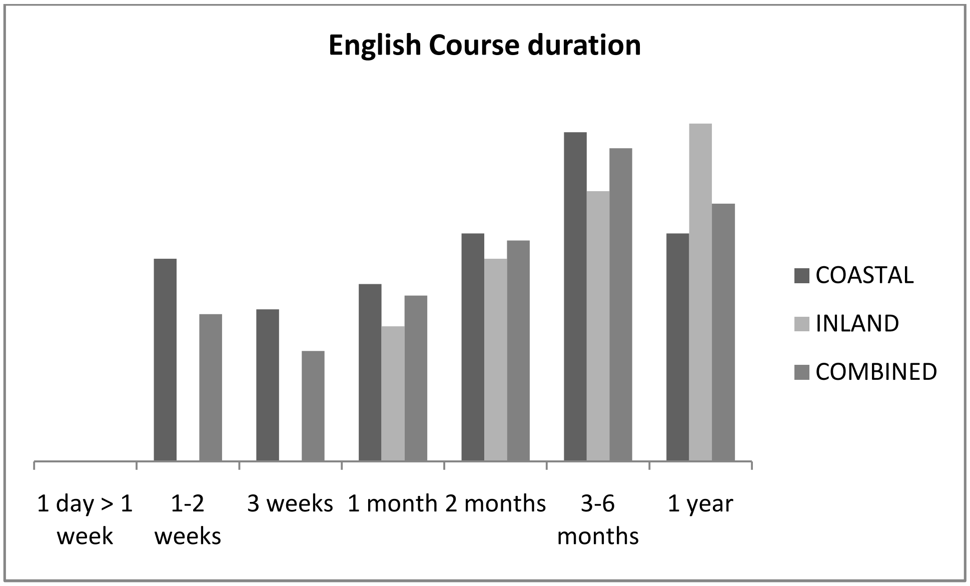


Figure 3.4 Course Duration
Source: Survey.

The patterns of courses and length of courses differentiated by coastal and inland locations is presented on Figure 3.4. It is shown that on average, coastal schools offered a wider range of course durations, from less than a week up to a year. Courses, for both coastal and inland schools tended to reach a maximum of a year but some schools reported that on occasion students could stay for longer courses of up to two years, depending on their required level of English. Inland schools tended to offer longer courses over all. The most popular course duration for both coastal and inland language schools was 3 to 6 months on average. The schools identified this category as the most popular because students would generally combine their studies with travel or remain for approximately the same amount of time after completing their course to travel around the country.

3.3.5 Student demographics

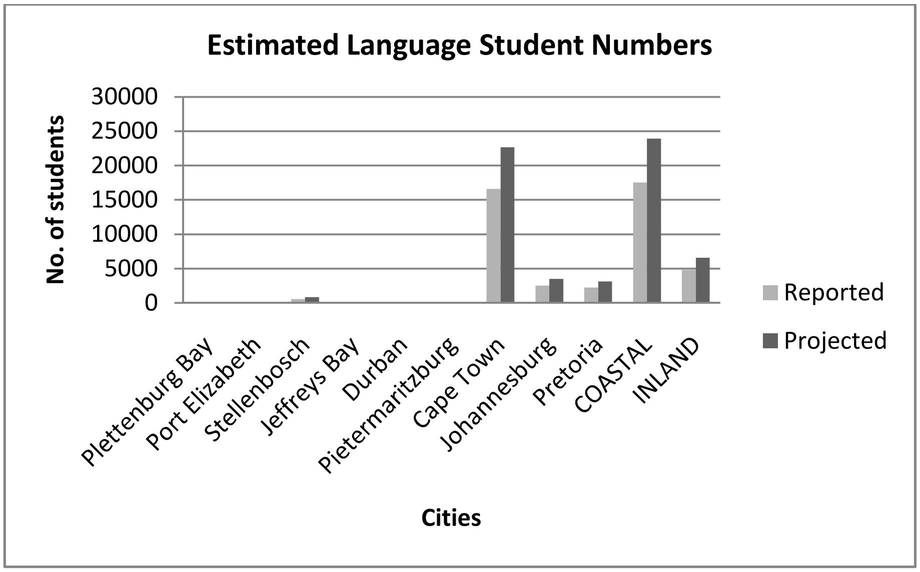


Figure 3.5 Estimated language student numbers
Source: Survey

Figure 3.5 shows the geographical distribution of language school students. It indicates once again the dominance of coastal schools in South Africa's language travel economy. The city of Cape Town followed by, Johannesburg and Pretoria has the largest number of language students. Overall, coastal schools have considerably more language learners than inland schools.

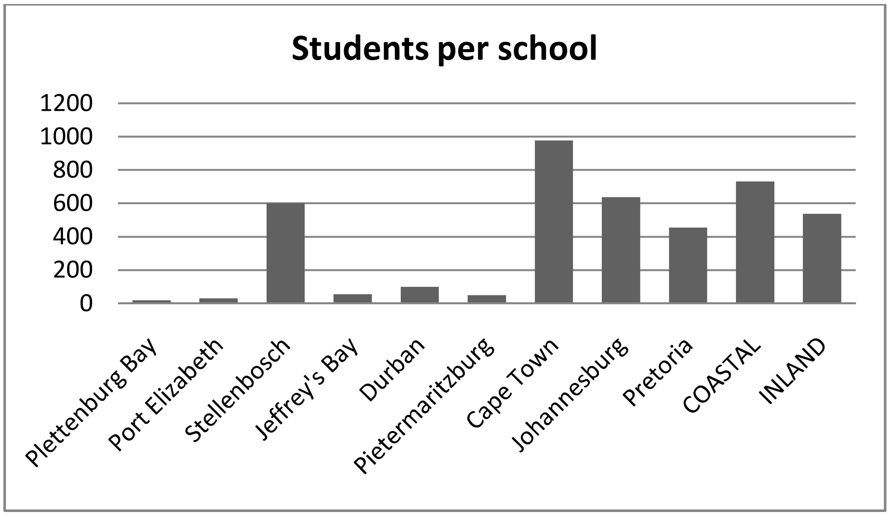


Figure 3.6 Students per school per city.
Source: Survey

Figure 3.6 presents an analysis of numbers of students per school by different location. It reveals that the largest schools are in Cape Town followed by Johannesburg, Stellenbosch and Pretoria. Cape Town had the largest schools with just under 1 000 students per school on average. It should be noted that Stellenbosch indicates an abnormally high number of students as the school that was interviewed was a large school, reporting approximately 600 students enrolled in their school per annum.Inland schools were smaller in size, ranging from 400 to just over 600 students on average per annum. Student numbers were projected for all existing language schools. The projected total students nationwide was just over 30 500, with coastal schoolsreceiving approximately 78 percent of total students.

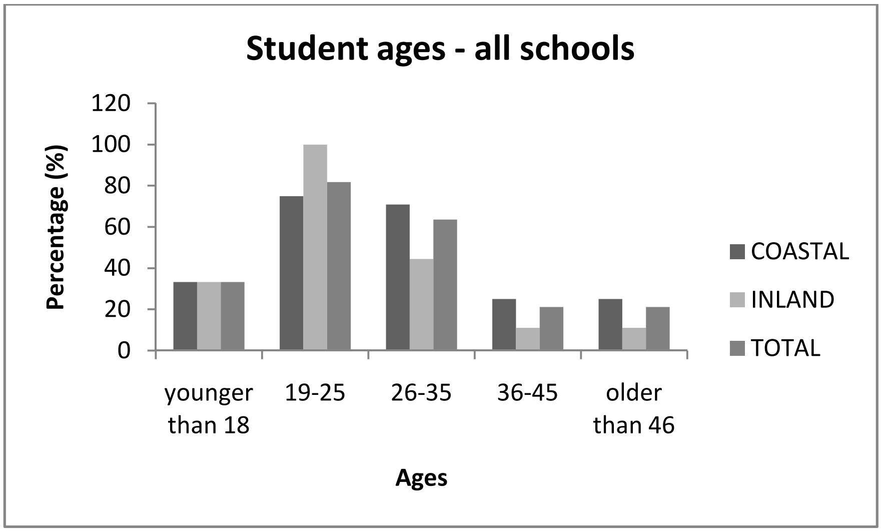


Figure 3.7 Student Age Groups.
Source: Survey

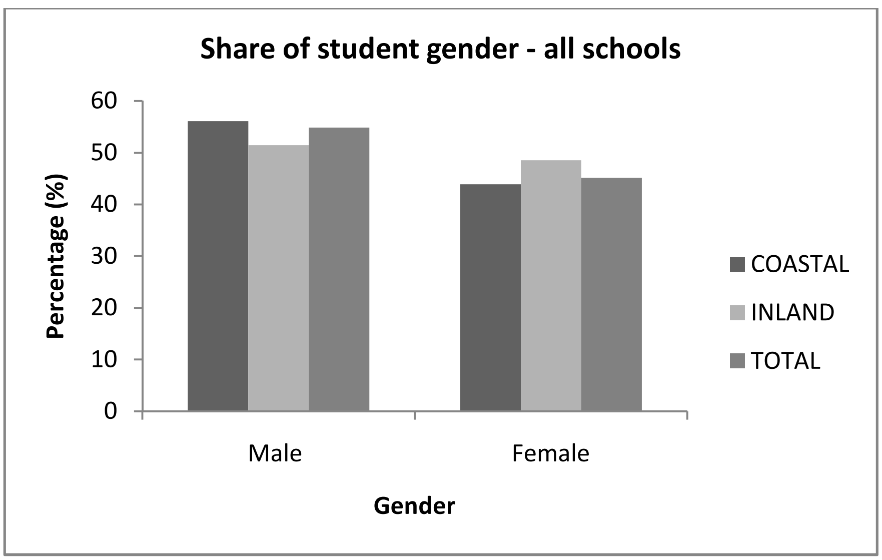


Figure 3.8 Share of gender among language school students.
Source: Survey

The role of language learning as part of the youth travel industry is confirmed by the findings presented in Figure 3.7. The largest group of students by age were those between the ages of 19 and 25. Coastal language schools attracted a generally older group of students as a whole. A significant number of students under the age of 18 suggests that there is potential for 'junior courses' or those aimed at particularly primary and high school students. As shown on Figure

3.8 the gender distribution was fairly evenly spread, with a slightly greater representation of male students in coastal schools and of female students in inland locations.

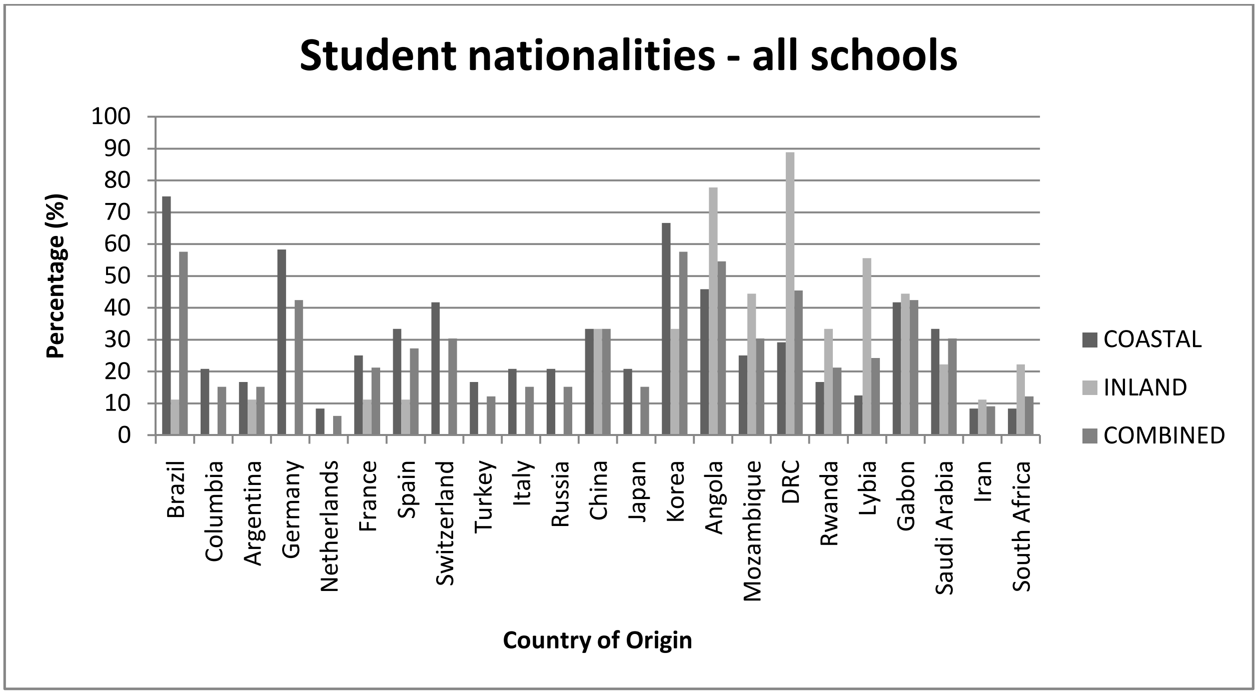


Figure 3.9 Language student nationalities.
Source: Survey

Finally, in terms of demographics, the source countries of language learning students were investigated. The results are shown in Figure 3.9. Overall, Brazil, Angola and the DRCongo were revealed as the three most critical source markets for English language students. On the whole, the group of coastal schools received more European and South American(especially Brazil) language students alongside key African markets such as Angola and Gabon. By contrast, key source markets for inland schools were mainly African markets Inland schools attracted more African students in particular from DRCongo, Angola, Libya, Gabon, Rwanda and Mozambique. In addition, it must be noted that Korea and China were significant Asian source markets with Koreans being particularly prominent at coastal language schools. In the interviews Saudi Arabia (particularly for aviation English) and Colombia were identified as key emerging markets with significant potential. Many coastal language schools also acknowledged the importance of the growing South American and Asian markets that needed to be further explored.

3.3.6 Seasonality

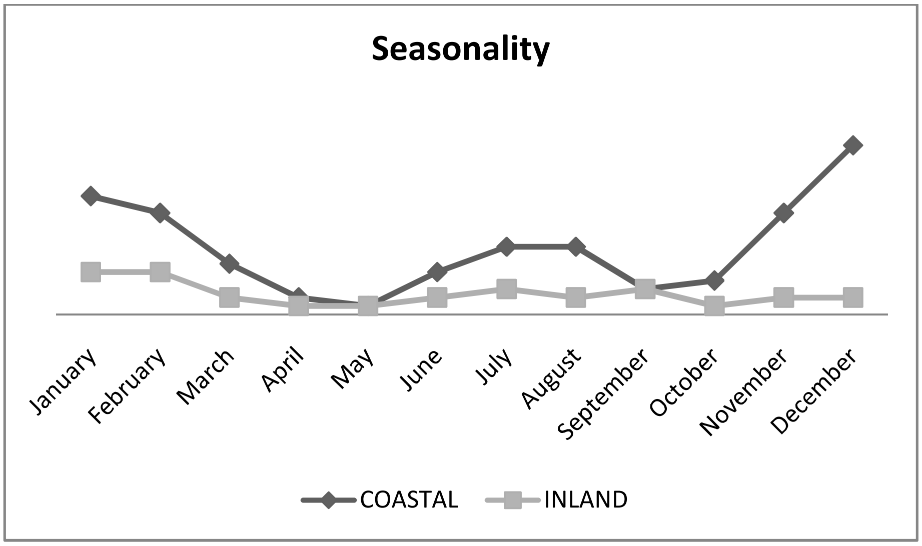


Figure 3.10 Seasonal patterns of language students.
Source: Survey

As is evident from Figure 3.10 there are seasonal variations in South Africa's English language travel economy.Seasonal patternsof language students were more consistent in inland schools with an overall year round seasonality. By contrast, coastal schools were more variable, indicating important peak seasons during the year-end holidays of November and December and a slight peak in the months of July and August. The seasonal patterns coincide with the summer holidays for overseas students, particularly Europeans, as well as South Africa's summer holiday season. January and February were reported as a significantly quiet months for both coastal and inland language schools. The African market were said to be the most consistent, particularly in the inland language schools and also made up for the January dip at coastal schools, especially the group of students from Gabon. The presence of Saudi Arabian and Asian students was more prominent during the July/August peak. The need to diversify into different markets was a concern throughout all schools in order to deal with the issues relating to seasonality. The impact of the 2010 FIFA World Cup was considered with different results for language schools nationwide. Most schools reported a significant decrease in the number of students during the event, and coastal schools tending to benefit more than inland schools in terms of student numbers.

3.3.7 Tourism related activity

Variations emerged in terms of the extent to which language schools offered other tourism-related activities. It was disclosed that coastal schools were more likely to include tourism related activities in their course packages, with many schools organising trips themselves and at times with the assistance of local tour operators and travel agents. Such activities are typically charged separately to course fees and are relatively flexible where students can request certain activities and attractions to be included in their itineraries. Group and student discounts were particularly difficult to obtain among Cape Town schools for local attractions. None of the schools had established relationship with operators of local attractions.

One of the most popular forms of extracurricular activity, particularly in coastal schools was social activities organised by the language school staff and usually hosted on campus. These social activities ranged from pizza evenings to informal dinners and trips to the cinema and restaurants or pubs. Some tourism-related activities involved trips to local attractions such as museums, theme parks, nature reserves, and wine tasting. The language schools in Jeffrey's Bay and Durban integrated surfing into their curricula by providing surfing lessons in the morning and English lessons in the afternoon or vice versa. Nevertheless, the 'travelling classroom' concept where students simultaneously learn English while travelling to parts of the country and enjoying the tourism attractions and activities, had not taken off as most schools operated from a fixed premises.

Inland language schools were least likely to assist students in organising tourism related activities as an additional option to their course offerings. If extracurricular activities were offered, these were mostly limited to the typical “touristy” attractions and activities in the Johannesburg surroundings including the Apartheid Museum, Johannesburg Zoo, Johannesburg Botanical Gardens, Gold Reef City, Soweto, Newtown, Union Buildings, Hatfield, and the Pretoria Zoo.

3.3.8 Accommodation

The accommodation of students was a further theme under investigation. It was found that many of the coastal language schools had their own accommodation, property of the school, either on campus or in walking distance from the school campus. This situation was not found in the inland schools, where schools reported that learners would most likely be placed with host families or in student communes akin to the privately owned properties around universities that are rented out to students. The close proximity of accommodation to the school and other surrounding facilities was an important marketing point for many schools, where students enjoy the walking distances to facilities such as shops, bus and taxi routes, restaurants, and the beach.

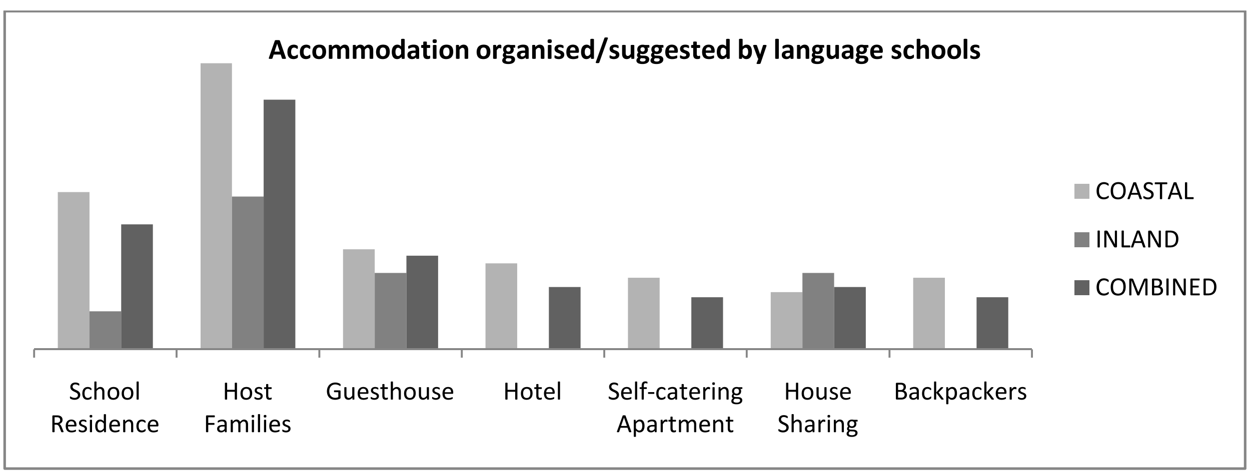
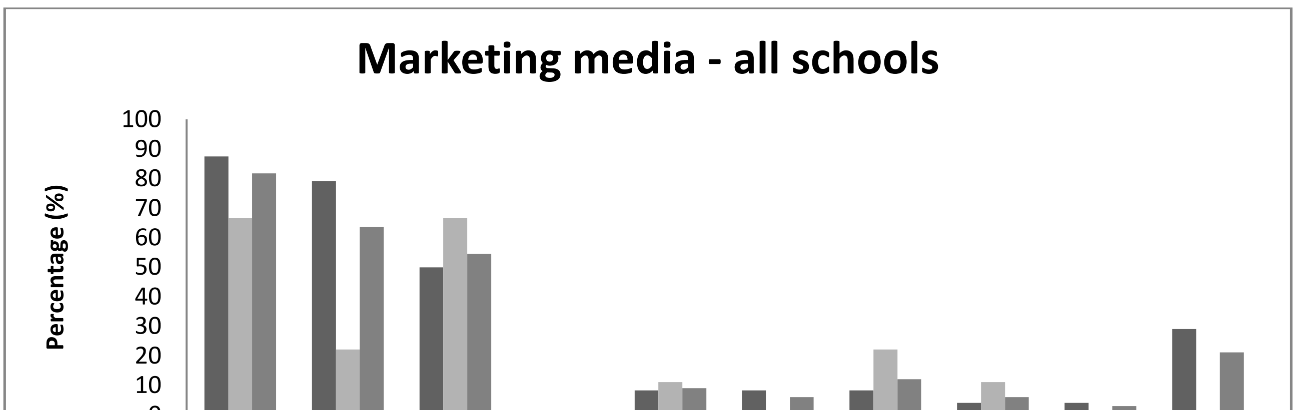


Figure 3.11 Accommodation offerings and/or suggestions by language schools.
Source: Survey

The overall patterns of accommodation of language travel students are captured on Figure 3.11. It is evident that the use of host families is the most common type of accommodationwhich is taken up by students. The host families are largely organised by international language school agents in the student origin country.Guesthouses and hotels were said to be more common forms of accommodation among older students or those who were attending English courses paid for by employers. Self-catering apartments were identified as more common among students who stayed for longer periods of time, particularly those that stayed for up to a year. The use of local backpackers was only mentioned by coastal language schools and was largely used by younger students.

3.3.9 Marketing Media



	internet	language school agents	word-of-mouth	travel agents/tour operators	travel magazines	brochures	Newspapers	Radio	Local/national Tourism Organisations	Trade Shows
COASTAL	88	79	50	0	8	8	8	4	4	29
INLAND	67	22	67	0	11	0	22	11	0	0
TOTAL	82	64	55	0	9	6	12	6	3	21

Figure 3.12 Marketing media used by language schools.
Source: Survey

In terms of marketing of schools, the survey revealed some interesting responses which are shown on Figure 3.12. It was clear that the internet is the most crucial method of marketing and information sharing for language schools, predominantly among coastal language schools. The use of international language school agents was more prominent among coastal language schools. Relationships with international agents were identified as one of the most critical steps in attempting to source international students, especially from Europe and South America as students from these origin regions were said to rely more on the advice and services of such agents.

Traditional word-of-mouth marketing was also an important marketing tool, especially for inland language schools. Local newspapers and radio were used by some language schools. Interviewees emphasized that these forms of marketing were too expensive. International trade shows held mostly in Europe and the Americas were key opportunities to meet and establish relationships with international language travel agents. Such trade shows occur frequently during the year but once again are viewed as expensive vehicles for marketing. Overall, it was argued by survey respondents that marketing support from local and national tourism organisations for the language travel sector was very poor.

3.3.10 Challenges

The interviews disclosed a number of challenges to the existing and future development of the language travel industry in South Africa.

"Fly-by-nights"

The most common challenge reported by the language schools interviewed was that many "fly-by-night" schools were appearing almost overnight, offering poor quality courses for the sake of "jumping on the bandwagon," where "everyone wants to make a buck" and subsequently closing. Some language schools pointed out that it is "quite easy to start a school on a small scale but people struggle to build on it and diversify". This situation results in the appearance of a number of poor quality schools that cannot establish a strong presence in student origin countries, particularly with overseas agents and so "give other schools a bad name".This was the case for both coastal and inland language schools. Nevertheless, most language schools welcomed competition and saw it as "healthy" for the purpose of encouraging quality.

Visas

Many of the schools did not experience problems with visas as they avoided being directly involved in the processes other than providing an acceptance letter for evidence of intent to study in order for students to be issued with visas. The schools that did raise concern about visas, pointed out that visa processes were too lengthy and paperwork was often lost and not dealt with in the correct manner. African students were identified as those with the most visa problems, particularly those from Angola. One school interviewee described the issuing of visas as "getting really sticky and fussy". Instances of fraud and the "misuse of visas" were also reported by several schools where courses were booked merely to obtain a visa to enter South Africa; students would not show up to the course. Corrupt bureaucratic procedures, particularly at Home Affairs Departments where bribery and corruption were identified as a "very real threat and challenge" were also concerns raised by language schools regarding visas.

Crime and corruption

The on-going issue of crime in South Africa was of concern to many language schools, particularly those in inland locations such as Pretoria and Johannesburg. The safety of students is an aspect of the language travel industry of South Africa that provides a great challenge for school marketing efforts, especially with international agents. One Pretoria school reported they had to often assist students who were arrested over the weekend for unfounded reasons by police looking for bribes and taking advantage of people who spoke their native languages while travelling around the city. Accordingly, in response to this danger, students are encouraged to speak English wherever they go.

International agents

The building of relationships with international agents that have direct contact with potential language students from key markets such as in Europe, Asia and South America, was indicated to be “lengthy and too costly”.International trade fairs were identified as useful vehicles and potentially even the best way to get into contact with such agents in order to convince them to list South African schools as a preferred destination for language learning. Nevertheless, these trade shows are often too expensive for an individual school to attend. Many of the interviewees suggested that there is a need for language schools to come together more often for the purpose of collaborative marketing and the sharing of ideas.

Support and recognition

The general consensus amongst language schools interviewed was that the industry is “not taken very seriously” in particular by national government. It was argued thatwhilst there is a need to “team up with tourism”, there is “no real recognition from the tourism industry”. Many schools found it difficult to establish relationships with tourism companies in order to expand and improve on the tourism offerings attached to English courses. Nevertheless, two schools acknowledged assistance from the national Department of Trade and Industry to attend a trade show. Such support, however, was inconsistent and regarded as very difficult to obtain.

Economic Crisis

The global economic crisis had an effect on some of the language schools interviewed, where certain student markets experienced a decline. In particular, interviewees stressed that there had been an impact on specifically the German and Korean markets. It was stated that “the number of Germans dropped immediately as they tend to be very meticulous and are scared of spending (in the current economic climate). They usually book months in advance but now are booking last minute”. One school emphasised the caution required when analysing declines in student numbers by saying: “don’t forget the recession put everything on hold”. Another interviewee pointed out that “times are tough and even though tourist numbers are going up, students are still comparing prices but cheaper is not always better”. The 2010 FIFA World Cup was mentioned by some schools as an important tool for exposure and a means to contestthe economic downturn that many schools had experienced.

3.4 Conclusion

The task in this chapter was to provide an analysis of the industry of language travel and learning in South Africa. The language travel industry in South Africa is emerging as a distinct new competitor and destination in the global landscape of language learning. Currently, the international economy is massively dominated by the United Kingdom, USA and growth of Australia. With the exception of Boekstein (2010), little research has been done on the South African language travel industry. It is revealed in this study that South Africa is growing its language travel industry and that in common with other countries that offer English language courses there is a close linkage also with other tourism and leisure activities and programmes. Language courses range from beginners up to more sophisticated programmes such as business and diplomatic English.

The research reveals that South Africa has a different dynamic to its international language travel industry to that which has been observed in other international destinations. Of greatest significance is the dualist character of the industry which is reflected in marked differences between coastal and inland language schools. The industry is dominated by the coastal schools with Cape Town, Jeffrey’s Bay and Durban as prime coastal destinations for English language programmes. The cities of Johannesburg and Pretoria are the inland destinations which focus upon a different kind of language product as well as source market. Johannesburg and Pretoria offer courses from beginner to business and diplomatic English as well as university preparation courses for those seeking to study further at a foreign university.

In marked contrast to the coastal schools, these language learning offerings – targeted mainly at African markets -do not seem to be associated with leisure/travel programmes which are a feature of the coastal language schools.In terms of industry development interviewees of most schools were optimistic about the future of the language travel industry in South Africa. In particular, they urged that the tourism industry and the government recognise the industry as important and become more involved in the developments of language travel. Concerns were raised about potential threats to South Africa as a competing language learning destination by the poor quality offerings made by 'fly-by-night' operations. Lastly, the need for greater diversification of source markets and more energetic marketing of South Africa through trade shows were recognised as issues that required attention.

CHAPTER 4: ENGLISH LANGUAGE STUDENTSAS TOURISTS IN SOUTH AFRICA

4.1 Introduction

The focus in this chapter shifts away from enterprises and the language schools to more squarely examine issues relating to the language tourists. The purpose of this chapter is to provide the findings from a small survey that was undertaken with English language learners in South Africa. More specifically, the results are summarised from a total of 75 questionnaires that were administered to language learners at both inland and coastal locations. Issues to be examined are the demographic aspects of language learners and critical aspects of the student experience, including motivation. In most respects the material presented from the demographic profile serves to confirm the findings presented in Chapter 3 drawn from the interviews with the operators of language schools. The findings of these limited surveys of language learners reinforce the argument that South Africa is emerging as a distinctive destination in the international economy of global language learning.

4.2 English language student questionnaire results

4.2.1 Student demographics

The findings from the 75 questionnaires confirm once more the linkage of language learning with the international youth travel market. Figure 4.1 shows the patterns of age distribution and gender of the sample of language learners.

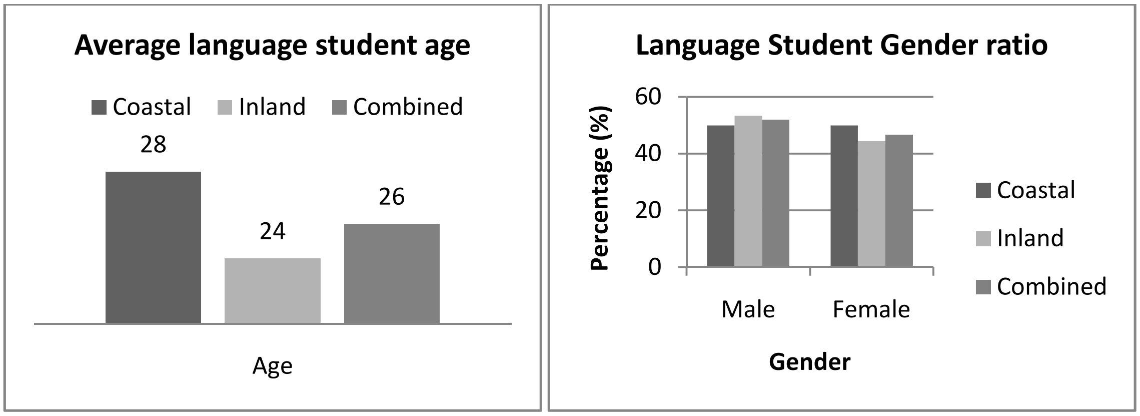


Figure 4.1 Average age and gender of language students.
Source: Survey

The results concerning the average age for the students are reflective of what the language schools had reported in the interviews. Coastal students were slightly older than those in inland language schools.Once again, student gender was relatively evenly distributed, with males and females being more prominent in inland and coastal schools respectively (Figure 4.1). It is shown that the youth segment is the core market for language learning. The average age for all of the 75 respondents was 26 years. As indicated, the coastal cohort of students had an average age of 28 years as compared to 24 years for those attending language learning at inland locations. In terms of gender there is once again a relatively even division between the proportion of male and female respondents both at coastal schools and inland areas.

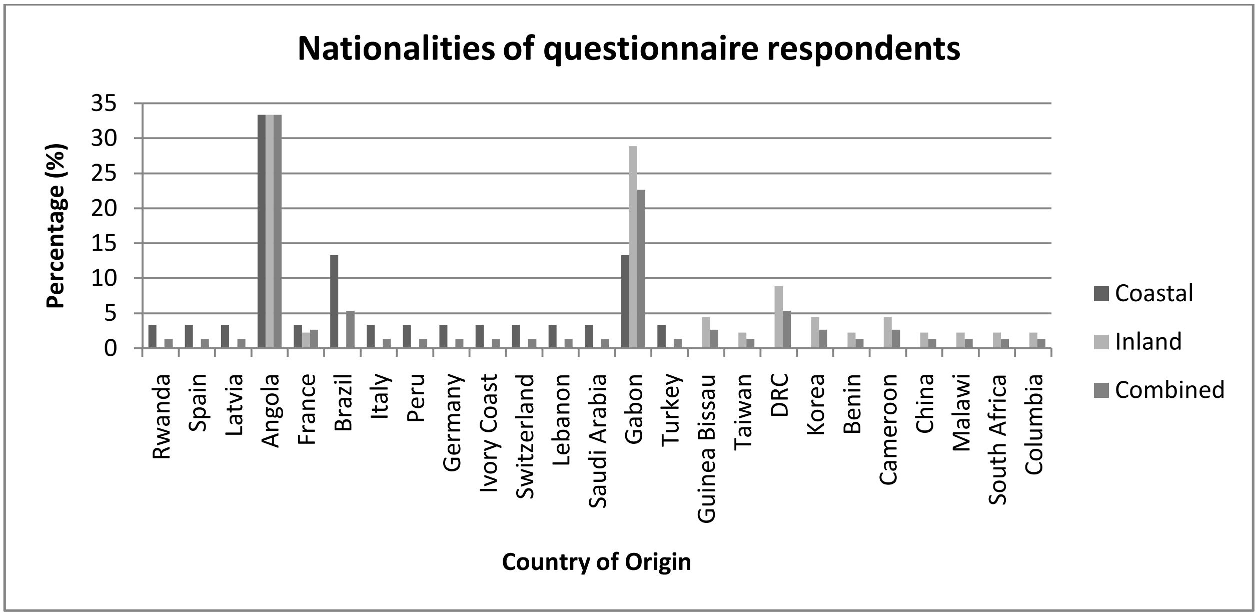


Figure 4.2 Student nationalities.
Source: Survey.

The origin of students is disclosed in Figure 4.2. It is evident that the surveyed schools contained a large proportion of learners from Angola and Gabon. Together these two countries accounted for over half of respondents. The remainder were spread across a range of other African source markets, including Rwanda, DR Congo, Cameroon, Guinea-Bissau and Ivory Coast. Non-African markets included a range of markets, most importantly Brazil, and spanned several countries such as Latvia, Spain, Saudi Arabia, Turkey, Lebanon, Korea, China and Colombia. As a general trend Angolan students were equallyrepresentated at coastal and inland schools and those from. Gabon was prominent, particularly in inland schools. Students from the DRC were visible mainly in inland schools and Brazilian students more common in coastal schools. Overall, European students were mostlyfound at coastal schools and inland schools attracted a greater proportion of the cohort of African language learners.

4.2.2 Motivation

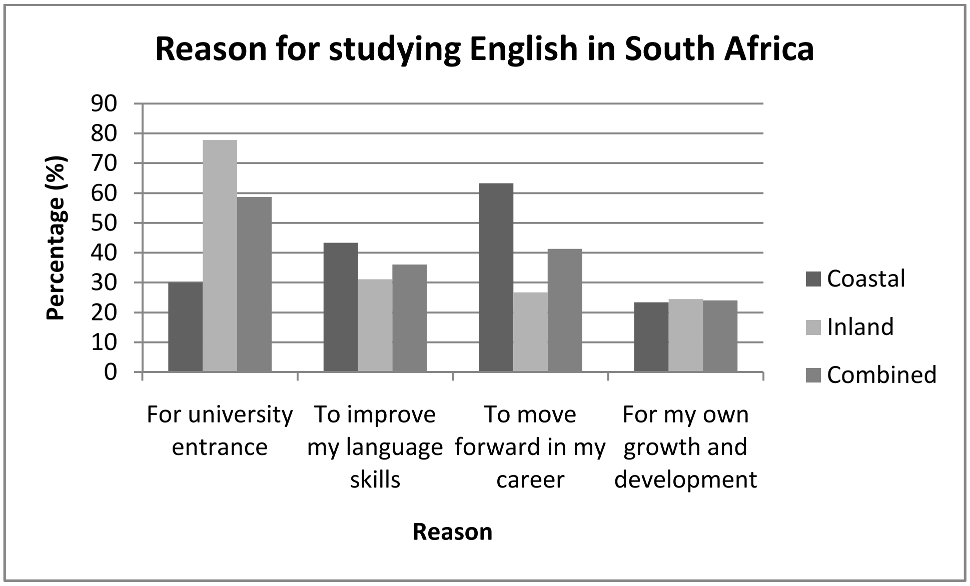


Figure 4.3 Reasons for studying English.
Source: Survey

The core reasons for students to learn the English language in South Africa are evident from Figure 4.3. A number of reasons were commonly stated. The most important motivation was to provide a foundation for entrance into tertiary education and to afford a foundation for career development. It is clear that learning the English language is not undertaken as a leisure activity. Some variations occurred between the responses obtained at coastal as opposed to inland schools. At coastal language schools, the most notable reason for learning Englishwas to move forward in one’s career. Angolans, who made up a significant proportion of students, were largely learning English because their employers had sent them to South Africa to do so. Likewise, Brazilian studentswere also likely to learn English for work purposes. A significant proportion of coastal students were learning English to improve their language skills, and so were more likely to be enrolled in more advanced courses. University preparation courses were most popular in inland language schools, particularly among students from countries in sub-Saharan Africa. Most inland students indicated that they would be returning later to the country for the purpose of studying at a South African tertiary institution.

Students were asked why they chose to learn English specifically in South Africa. The most common responses elicited were as follows:

- South Africa is "a special place",
- "it is close to my country" (particularly African students),
- Because "I can learn British English",
- "Everybody told me it is amazing so I want to try",
- "It's cheaper than the UK",
- "To learn English in an African culture",
- "Good methodology to learn" (good teaching methods – i.e. quality),
- "Good weather, good people, cheap prices",
- "Because I don't need visa" (Brazilian students do not require a visa for stays under 90 days) and;
- "I want to further my studies".

It was made clear that many of the cohort of African students, particularly those studying in Johannesburg, stated that they had family living in the country already and therefore it was much easier for them to learn English in South Africa than other destinations and subsequently to further their studies in South Africa.

4.2.3 Extracurricular activity

In research on language travellers in Australia it was revealed by Pearce & Son (2004) that language travellers constituted a distinct sub-segment of the country's expanding youth tourism market. In particular, it was shown that this group in Australia were closely akin to pleasure travellers and that during their studies in Australia they travelled widely through the country. It was argued that the international English language student market travelled in a different manner to other kinds of youth tourists, such as backpackers, and preferred different accommodation and activities. Indeed, unlike backpackers in Australia international students preferred travelling by car and they tended to stay in hotels or motels"(Pearce & Son 2004: 39). Overall, it was concluded that they constituted a distinct sub-segment of the youth tourism market with particular preferences and patterns of expenditure.

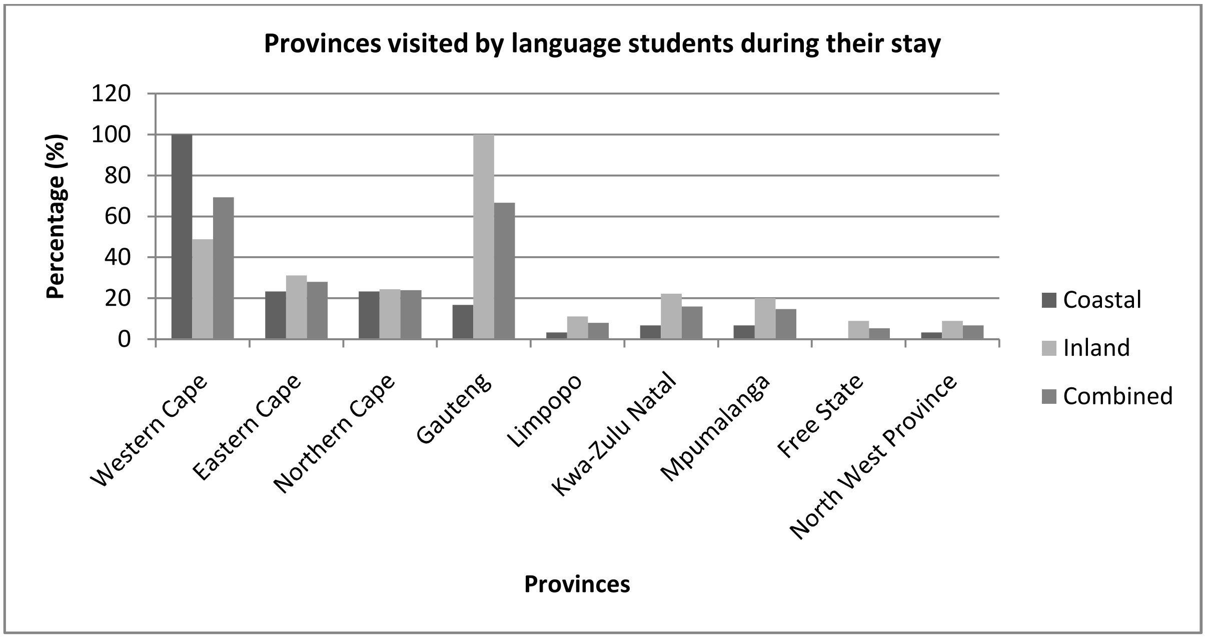


Figure 4.4 Provinces visited.
Source: Study

On Figure 4.4 is shown the patterns of visitation on a provincial basis of international language travellers to South Africa. The broad picture is one that is different to the Australian experience. The majority of the interviewed language students in South Africa travelled only infrequently rarely outside of the province where they were resident in. When students did venture beyond the province where they were based it was usually to travel to the neighbouring province. It was revealed that neighbouring provinces in relation to where their schools were situated represented the most visited areas. Overall, the most popular provinces other than where the majority of schools are indicated were the Eastern Cape, Northern Cape, Mpumalanga and Kwa-Zulu Natal.

For most language travellers extra-curricular activities were thus based in the region where they were studying. Popular activities and visits to local attractions among coastal language students included: township tours, the Garden Route, wine tours, museums, social outings to local restaurants, pubs and cinemas, Cape Point, Table Mountain, Camps Bay, cage diving, surfing lessons, safaris, shopping, and parties. Inland students had taken part in activities and visited local attractions such as: Soweto, Newtown, social outings to local restaurants, pubs and cinemas, ice skating, the Apartheid Museum, Gold Reef City, picnics, parties, social activities organised by schools (such as singing competitions and braais/barbeques), nature reserves, camping, local zoos, township tours and visits to local universities.

4.2.4 Accommodation

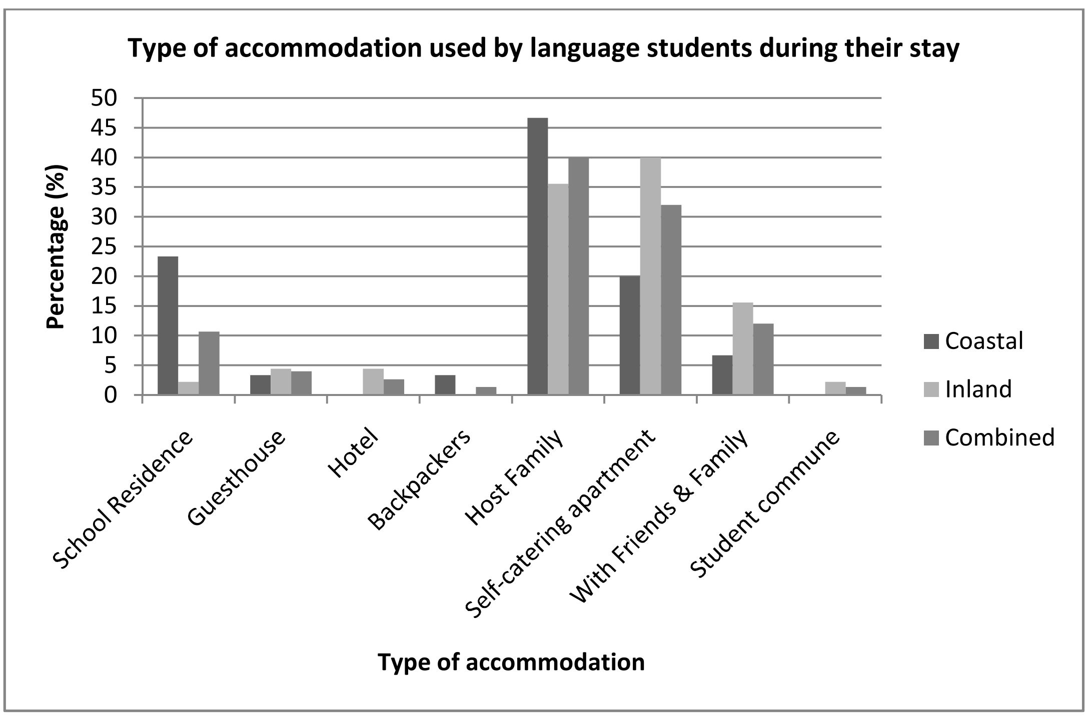


Figure 4.5 Type of accommodation.
Source: Survey

In common with the patterns of accommodation used by language learners in other parts of the world, the survey revealed that host families were the most popular form of accommodation overall, particularly for coastal students (Figure 4.5). School residences, owned and run by the language schools were more common at the coast. Backpackers were only used by coastal students but were not very popular. Self-catering apartments were also common among coastal students, in many instances either organised by the language school itself or by the student.Inland students were most likely to stay in self-catering apartments, organised by themselves or by their employers. Staying with friends and relatives was particularly common among inland students in Johannesburg. Many of their siblings or other family members were already studying or working in the city, making it easier for students to come to South Africa to learn English and further their studies. Student communes were a form of accommodation used by only a tiny minority of language travellers.

4.2.5 Length of stay

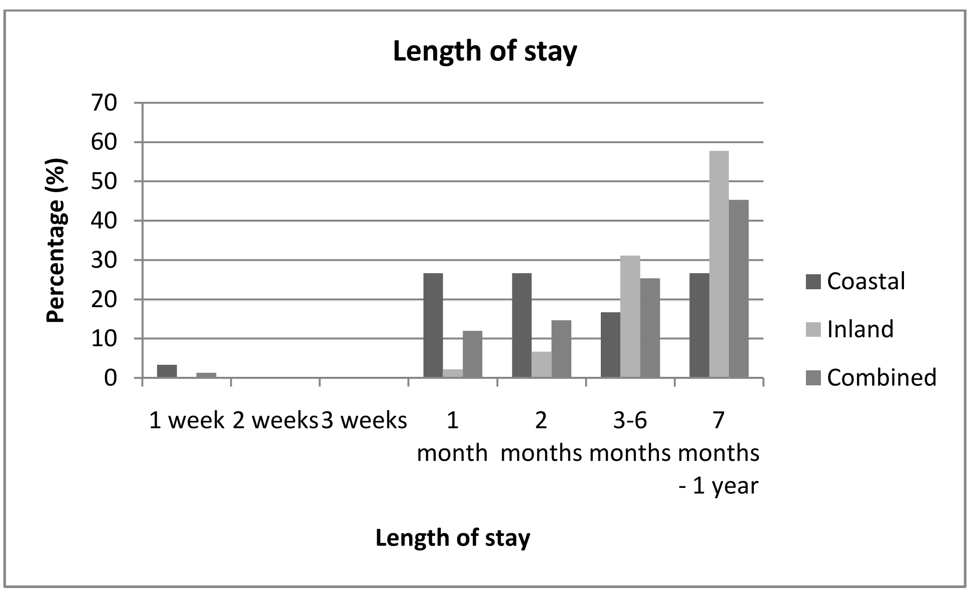


Figure 4.6 Length of stay.
Source: Survey

The patterns of length of stay of language travellers in South Africa are shown in Figure 4.6. It is evident that the largest numbers of students stay in South Africa for periods of between 7 months to one year. Coastal students tended to stay for shorter periods of time, with most averaging between one and two months. By contrast, inland students were likely to stay longer, particularly between 7 months and a year for an English language course. The responses of students related to how long they would remain in the country after they have completed their language course. Coastal students, average an extended 8 months stay, while inland students averaged an extended 31 months stay. Inland students extended stay is much higher due to many of them returning to study at a university for degree purposes.

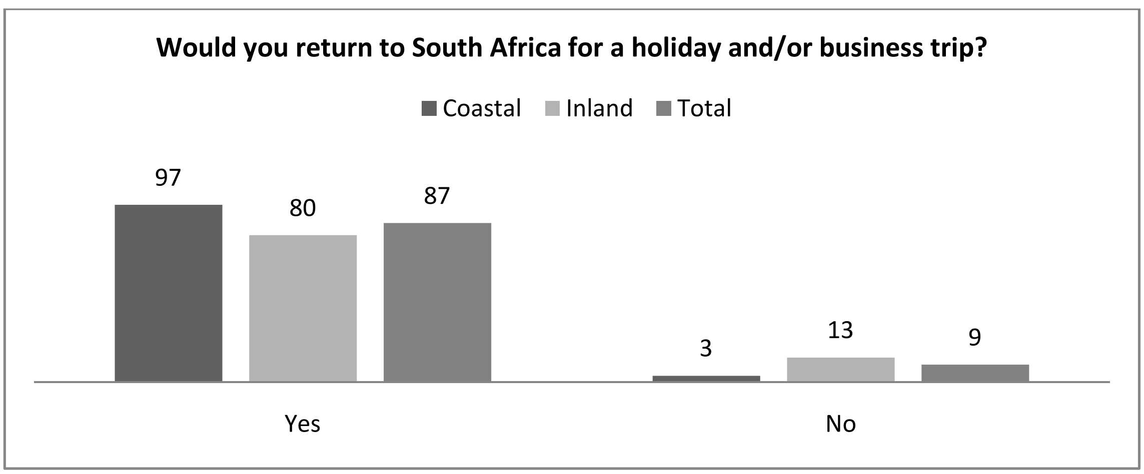


Figure 4.7 Return to South Africa.
Source: Survey.

When asked if students would return to South Africa for holiday, study and/or business purposes, the vast majority of students were highly positive with a response of nearly 90 percent wishing to return to South Africa (Figure 4.7). This finding mirrors that in other research that language travellers to a destination are often potential repeat travellers later in their lives.

4.2.6 Spend

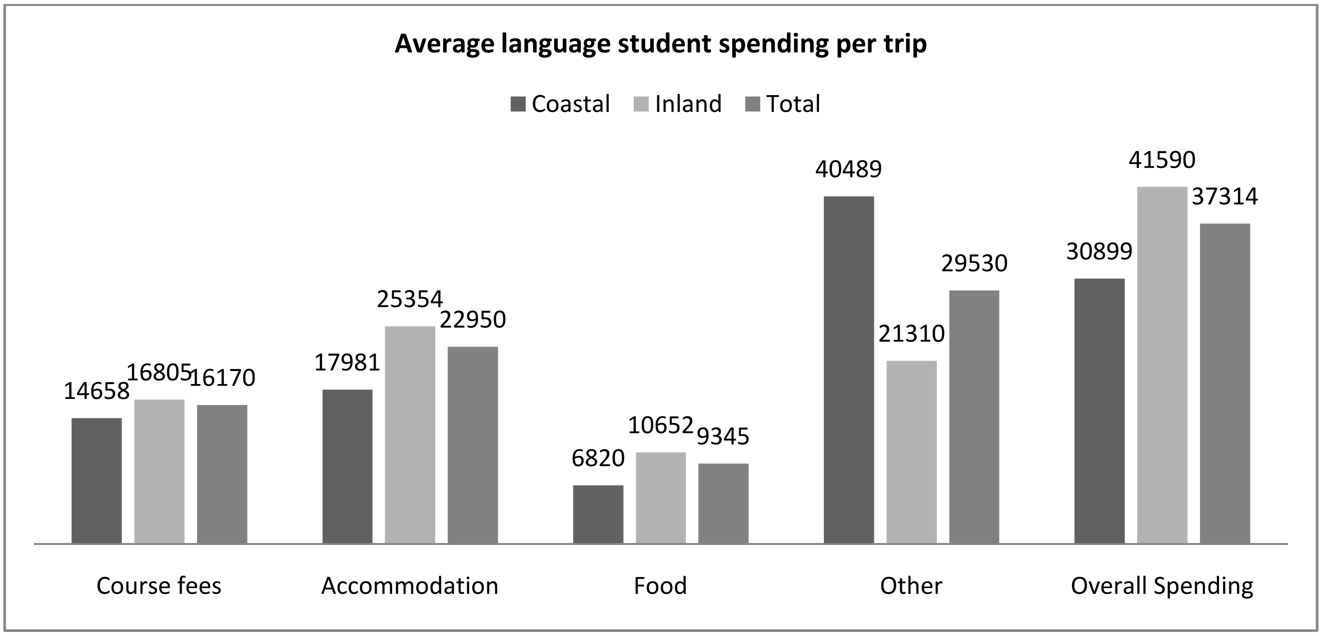


Figure 4.8 Average spend.
Source: Survey

Figure 4.8 represents an attempt to capture overall spending per trip of South African language travellers. It was revealed that the average language traveller spends an amount of R37 314 during their stay in South Africa. This figure is comparable and exceeds that of many if not the majority of long haul international travellers to the country. It is clear, therefore, that the language travel sector is thus a potentially high value earning segment for the South African tourism economy. Indeed, If the student number projections in Figure 3.6 for national language student numbers of 30 500 were to be taken into consideration with the average overall spend per student, per trip (Figure 4.8), the total value of the South African language travel industry could be estimated at over R1.1 billion annually.

In terms of different forms of expenditure it is evident from Figure 4.8 that accommodation and course fees represent the two most important individual items for expenditure followed by food purchases. Of significance, however, is the high level of expenditure which is recorded as other'. This expenditure classed as "other" included transport, trips and entertainment. Coastal students were most likely to spend money on "other" expenses as coastal schools encouraged students more to participate in other activities. Overall, however, inland students spent the most money during their stay in South Africa, averaging almost R10 000 more than coastal students.

4.2.7 Information Media

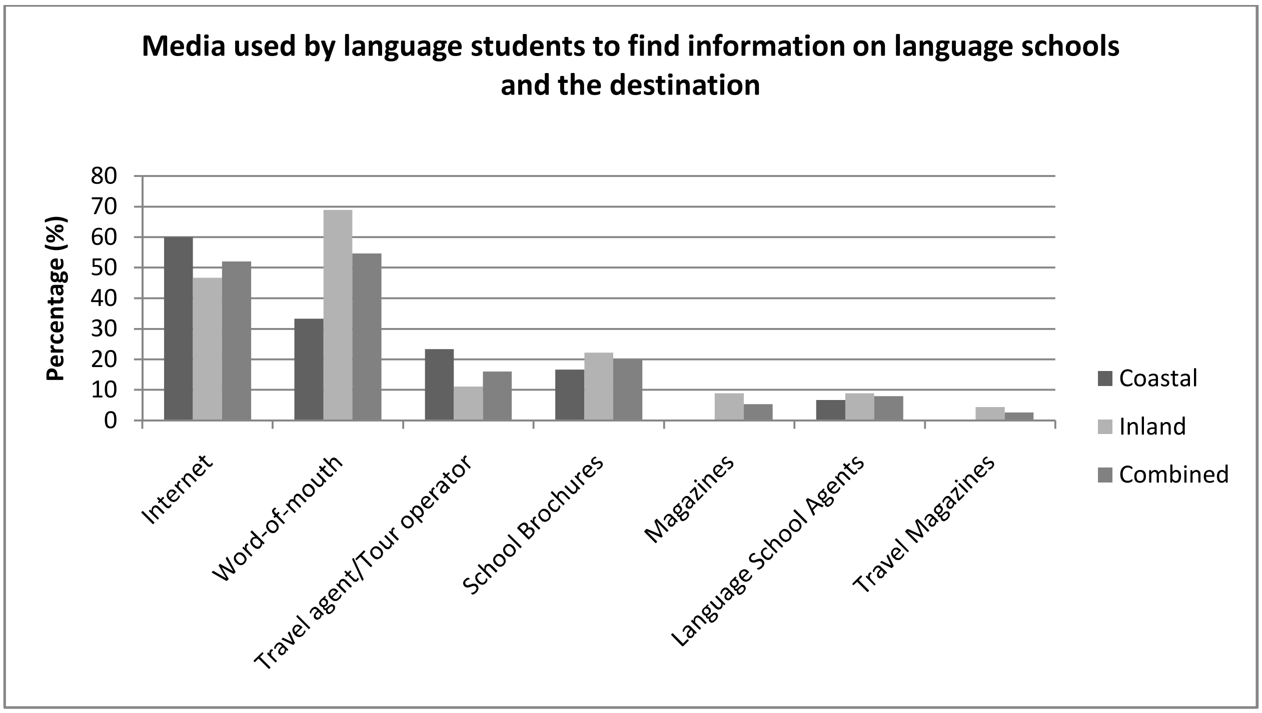


Figure 4.9 Use of information media.
Source: Survey

The final issue that was investigated in the student survey related to marketing and sources of information that were accessed by language travellers to South Africa. Figure 4.9 represents the summary findings on this issue. It is apparent that when searching for information on language schools and South Africa itself, both coastal and inland schools made use of the internet above other media on average (Figure 4.9). Word-of-mouth was more important among inland students who mostly relied on relatives and friends who were already working or studying in the country. Coastal students were more likely to make use of travel agents and/or operators than inland students. School brochures were also a relatively popular source of information, more so with inland students. Few students made use of international language school agents or magazines. In terms of marketing South Africa for language travel, the importance of internet is clearly shown by the overall findings on Figure 4.9.

4.3 Conclusion

The objective in this chapter was to provide further insight into the workings of the language travel industry in South Africa. As a complement to the survey undertaken of language schools as presented in Chapter Three, the focus here was upon the language travellers themselves. The results from the student survey indicate that the language travel market is potentially a high value segment for the South African tourism industry. Although language travellers spend only a limited budget daily, as a result of their extended length of stay in the country their total travel spend is considerable. In common with the findings from Australia it is clear from these results that the language travel market is a distinct sub-segment of the youth tourism economy in South Africa. Coastal and inland students differ in various ways. Coastal students were more likely to be older, female, European, learning English for job specific purposes, travel more and make use of host families and school residences more. Inland students were more likely to be younger, male, African, learning English to gain entrance to a university, stay longer and spend more.

Overall, these differences that are emerging between the student profiles and expenditures at coastal and inland locations suggest that there is further segmentation of the language student market, which potentially is linked to their country of origin and length of stay in South Africa. These are issues which require further examination in extending further our understanding of the language travel industry of South Africa.

CHAPTER 5: CONCLUSION AND RECOMMENDATIONS

Youth tourism is fast becoming one of the most important sectors of the international tourism economy and is gaining increasing attention from international scholarship. Young people are travelling more often, to more destinations and are generally spending more than any other group on international travel (Richards, 2008). The growth of youth travel has been prompted by changing concepts of youthfulness, increased levels of participation in tertiary education, labour mobility and the growth of overseas study programmes (Richards & King, 2003: 1). The student market is one of the most underestimated youth travel markets internationally.

Language travel has become a global youth tourism phenomenon as a result of globalization which has highlighted the importance of the English language.International literature on the historical origins and development of language travel suggests that it evolved from the Grand Tour of 1500-1600s into modern education travel, where the opportunity to combine studies and travel has grown into a substantial international industry. The need and/or desire to learn English, has spawned an array of language course offerings in key language learning destinations, most importantly the UK, Ireland, USA, Canada, Australia, New Zealand and Malta.

The continued international surge of the language travel industry is driven by the fact that language learning has become a necessity to keep pace with economic and cultural globalization processes. Major source countries for English language learning include China, Korea, Japan, Brazil, Italy and Spain. One consequence of a growing market for language travel is the establishment and growth of language learning industries in key learning destinations.Growing competition is emerging between the key international destinations for English language travel as their governments have recognised English language learners as important contributors to their tourism economies, as well as the opportunities for cultural exchange.

The global language travel market is estimated to be valued at $8 billion per annum, which effectively represents almost 7% of the global youth travel market (Richards, 2009: 1). Language travel has become an important niche tourism market. Only recently have the far-reaching economic impacts of language students on tourism spending and the economies of destinations gained substantial attention. Scholarship on language travel has been scattered and often linked to consultant studies. The attractiveness of the language travel market is beginning to be appreciated. Language students have been identified as spending more money directly with local suppliers, spending longer periods of time than other traditional types of tourists, as well as potentially generating a subsequent VFR market to further increasing their economic impact.

Outside of Europe, Australia and North America research on the growth and development of the language travel industry is currently lacking. This knowledge gap is addressed in this research report which has sought to contribute the first detailed understanding of the organisation and workings of language travel in South Africa. Within the global language travel industry South Africa is a recent arrival and its current global market share is estimated as only 1.4% (Figure 2.1). To a large extent the language travel industry in South Africa has emerged 'under the radar' with links mainly to the youth tourism industry, which is dominated by backpackers and volunteers. The contribution made by this study has been to open up debates of the workings and potential of the language travel industry in South Africa. Building upon the initial study of Boekstein (2010) a national data base was constructed to examine the extent of the national industry. It was revealed that a total of 52 established language schools are functioning in South Africa alongside an unknown number of informal operations.

Overall, this researchaimed to address the gap in local knowledge as to the developments of the language travel industry in South Africa. The study investigated the development, size, scope, organisation and significance of the language travel industry in South Africa. The investigation into the country's position in the global language travel economy and the internal organisation and patterns in industry was based upon a total of 108 survey interviews which included 33 semi-structured interviews with operators of language schools and a sample of 75 language learning students.

It is disclosed from this study that South Africa is growing its language travel industry as well as evolving direct links to other tourism-related activities. Language courses range from beginner levels to more sophisticated programmes, including English for specific purposes such as aviation, business and diplomatic English. Among the key findings of this investigation is to highlight the dualistic character of the language learning industry in South Africa. In particular, distinct differences were observed between the nature of schools and learners found in the coastal schools, predominantly in Cape Town, and those in inland locations, more specifically in Johannesburg and Pretoria. The marked differences between coastal and inland language schools in the country reveal a dichotomy that exists within the industry. The South African language travel industry is dominated by the coastal schools, particularly in the city of Cape Town, but also in other centres such as Jeffrey's Bay, Port Elizabeth and Durban. The inland schools concentrate in Johannesburg and Pretoria which offer different kinds of language products and cater for different source markets to those at the coast. It was apparent that the inland school programme offerings are largely targeted at the sub-Saharan African market. In addition, these schools are not associated with an attached leisure/travel programme which is an important feature of coastal schools.

Overall, the industry appears to be in a positive growth phase as South Africa becomes 'discovered' as an English language travel destination. The majority of schools interviewed expressed a positive outlook towards the future of the South African language travel industry. Nonetheless, there were some important challenges which surfaced. Language schools urged the tourism industry and the government to recognise the importance of the industry and become more involved in the development of language travel. Further, there are legitimate concerns about the effects of the poor quality offerings of "fly-by-night" schools, which pose a threat to the image of the industry both locally and internationally. Other challenges surround the issuing of visas, the need to diversify source markets, as well as the imperative for more active marketing efforts particularly at international trade fairs.

Importantly, one finding from the interviews with language students was that language travel is potentially a high value segment for the South African tourism industry. The extended length of stay of language learners means that their total travel spend is considerable, despite having a limited daily budget. A critical conclusion of this study is that the value of the language travel industry in South Africa could be as much as R1.1 billion annually. Coastal students were more likely to be older, female, European, learning English for job specific purposes, travel more and make use of host families and school residences more. Inland students were more likely to be younger, male, African, learning English to gain entrance to a university, stay longer and spend more. These differences suggest that there is further segmentation which needs to be investigated further. The return of language learners for the purpose of studying at a South African tertiary institution was identified as a potential extension of the economic value of language learners in the country.

In the global economy of language travel, the South African language travel industry is surfacing as an up-and-coming English language learning destination, which is aiming to compete with more established global players such as the UK, USA, Malta or Australia. This study suggests that as part of potential initiatives for supporting the 'niche markets' of youth tourism and educational tourism, there is a strong case for national government to examine the potential for further development of language travel. In final analysis the dynamic situation of the industry in South Africa merits further research into its workings and progress over the next decade.

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APPENDIX A – LANGUAGE SCHOOL INTERVIEW QUESTIONS

SECTION A: GENERAL

Name of School: ____

Location: ____

Contact Person: ____

Contact Number: ____

Email: ____

website: ____

SECTION B: DEVELOPMENT OF LANGUAGE SCHOOLS IN SOUTH AFRICA

1. When was your school established? _____________________________________

    1.1 Why was your school established? ____

    ____

    ____

    1.2 Has the ownership changed since establishment? Why? ___________________________

    ____

    ____

2. Do you operate independently or as part of chain of language schools? *(please mark with an X)*

    ☐ Independently ☐ Language School Chain

3. If you are part of a chain of schools, is it an international or local chain? *(please mark with an X)*

☐ International ☐ Local

Please name the organisation ____

3.1 Who owns this chain? ____

3.2 How many schools fall under this chain? ______________________

3.3 Where are these schools located? ____

____

____

____

4. Student numbers:

4.1 How many students enrol in your school per annum on average? ____________________

4.2 How many students are enrolled per course? ______________________________________

4.3 How has your student numbers increased/decreased over the past 5 years?

____

____

____

5. Staff numbers:

5.1 How many staff members does your school currently employ? ______________________

5.2 How do you recruit your staff? ____

5.3 How has your staff increased/decreased over the past 5 years? ______________________

____

6. Physical premises:

6.1 Where are you currently located? ____

6.2 Have you relocated previously? If so, from where and why? ________________________

____

____

____

6.3 What are the benefits of your current location? _________________________________

____

____

7. Do you or have you ever belonged to a language school association? *(please mark with an X)*

☐ Yes ☐ No

If yes:

7.1 Which organisation(s) are/were you associated with? ____________________________

____

7.2 What are the benefits of being associated with such an organisation?

☐ Marketing opportunities

☐ Up to date information on language industry trends

☐ Accreditation

☐ Standardised administrative procedures (improved efficiency)

☐ Communication platform between schools

Other (Please specify) ____

7.3 How many other language schools are associated to the same organisation? __________

7.4 Where are the other language schools in the association situated?

☐ International – Cities/countries ____

____

☐ Local – City ______________________________

If no:

7.5 Why not? ____

____

____

____

____

____

SECTION C: LANGUAGE SCHOOL MARKET

8. What is the proportion of students by nationality enrolled at your school?

Angolan____%	Brazilian ____%	German ____%
Italian ____%	French ____%	Spanish ____%
Dutch ____%	Chinese ____%	Japanese ____%
Korean ____%	Turkish ____%	Swiss ____%
Saudi Arabian ____%	Mozambican ____%	

Other (Please Specify) ____

8.1. Has the proportion of nationalities changed over the past 5 years? If so, how? ________

____

____

____

____

9. What is the average age of your students? *(please mark with an X)*

☐ less than 18 ☐ 19-25 ☐ 26-35 ☐ 36-45 ☐ greater than 46

9.1 Has the average age of your enrolled students changed over the past 5 years? If so,

how?____

____

____

____

____

10. What is the proportion of male and female students at your school?

Male ____% Female____%

10.1 Has this proportion changed over the past 5 years? If so, how? ____________________

____

____

____

11. Which months of the year are the busiest for your school? *(please mark with an X)*

☐ January ☐ February ☐ March

☐ April ☐ May ☐ June

☐ July ☐ August ☐ September

☐ October ☐ November ☐ December

11.1 Has there been a change in the seasonality over the past 5 years? If so, how?

____

____

____

____

____

SECTION D: LANGUAGE SCHOOL OFFERINGS AND PRICES

12. What language courses do you offer? *(Please list all or attach a list)*

☐ Beginner English ☐ Intermediate English

☐ Advanced English ☐ Business English

☐ Diplomatic English ☐ University Entrance Preparation

☐ TESOL certification

Other (Please Specify) ____

13. How much do your courses cost on average? *(please mark with an X)*

☐ less than R 1 000 ☐ R 1 001-R 2 000 ☐ R 2 001-R 3 000 ☐ R 3 001-R 4 000

☐ R 4 001-R 5 000 ☐ R 5 001-R 6 000 ☐ greater than R 6 001

14. How long on average do your courses last? *(please mark with an X)*

☐ 1 day ☐ 1 day > 1 week ☐ 1-2 weeks ☐ 3 weeks

☐ 1 month ☐ 2 months ☐ 3-6 months ☐ 1 year

15. Do you offer accommodation to students? *(please mark with an X)*

☐ Yes ☐ No

15.1 If yes, what type of accommodation? *(please mark with an X)*

☐ School residence ☐ Guesthouse ☐ Hotel

☐ Backpackers ☐ Host family

Other (Please Specify) ____

15.2 If yes, what is the average cost of the accommodation? ___________________________

____

16. What extra activities do you attach to your courses? *(please mark with an X)*

☐ Surfing lessons

☐ Social events (i.e. going out to restaurants, etc)

☐ Wine tours

☐ Township tours

Other (Please specify) ____

____

____

____

____

16.1 Has there been any change in these offerings in the past 5 years? Please elaborate.

____

____

16.2 Are these activities offered as part of your courses or are they simply suggested activities? ____

16.3 Do you have any relationships with local tour operators re the offering of these activities? ____

SECTION E: MARKETING

17. What is the most useful form of marketing for your school? *(please mark with an X)*

☐ Internet

☐ Language school agents

☐ Recommendations from family/friends/previous students

☐ Travel agents/Tour Operators

☐ Travel Magazines

☐ Brochures

Other (Please specify) ____

18. Have you changed your marketing methods over the past 5 years and why/why not? __________

____

____

____

SECTION F: CURRENT PROBLEMS AND FUTURE TRENDS

19. What strengths and weaknesses does your school currently have? __________________________

____

____

20. What problems does your school currently face within the industry? _______________________

____

____

____

____

____

____

____

21. Do you get support from local government?

☐ Yes ☐ No

21.1 What problems do you face from local government? (i.e. funding, zoning, etc) _________

____

____

____

22. Are you planning to expand your school in the next 5 years? If so, how? ____________________

____

____

____

23. Do you expect the industry to grow in the next 5 years? If so, how? ___________________________

____

____

____

____

____

____

24. What changes do you expect to occur in the industry within the next 5 years? _________________

____

____

____

____

____

____

____

____

25. Are there too many language schools in the country? _______________________________________

____

____

____

APPENDIX B – LANGUAGE STUDENT QUESTIONNAIRE

BIOGRAPHIC
1. Name (Optional): ____   2. Gender: *(Please mark with an X)* ☐ Male ☐ Female   3. Age: ______   4. Nationality: ___________________________________
MOTIVATION
5. Why have you chosen South Africa as an English language learning destination?   ____   ____   ____   ____   6. Why are you learning English? *(Please mark with an X)*   ☐ For university entrance   ☐ To improve my language skills   ☐ To move forward in my career   ☐ For my own growth and development   Other (Please Specify) ____

EXPERIENCE

7. What activities did you take part in besides your English courses? (e.g. trips to museums, game drives, wine tours, township tours, surfing lessons, social outings to local restaurants, etc)

____

____

____

____

____

8. Which provinces did you visit or are planning to visit during your stay? *(Please mark with an X)*

☐ Western Cape ☐ Eastern Cape ☐ Northern Cape

☐ Gauteng ☐ Kwa-Zulu Natal ☐ Limpopo

☐ Mpumalanga ☐ Free State ☐ North West Province

9. What type of accommodation did you make use of during your stay? *(Please mark with an X)*

☐ School residence ☐ Guesthouse ☐ Hotel

☐ Backpackers ☐ Host family ☐ Self-catering apartment

Other (Please Specify) ____

10. How long did you stay/are planning to stay in South Africa? *(Please mark with an X)*

☐ 1 day ☐ 1 day > 1 week ☐ 1-2 weeks ☐ 3 weeks

☐ 1 month ☐ 2 months ☐ 3-6 months ☐ 1 year

11. Would you return to South Africa for a holiday and/or business trip? *(Please mark with an X)*

☐ Yes ☐ No

12. How much money did you spend or will be spending for your trip on average for the following?

English Course(s) ____

Accommodation ____

Food ____

Other (Please Specify) ____

____

____

MARKETING/MEDIA

12. How did you find the language school you attended? *(Please mark with an X)*

☐ Internet

☐ Recommendation from family/friends

☐ Travel agents/Tour Operators

☐ School Brochures

☐ Magazines

☐ Language school agents

☐ Travel Magazines

Other (Please specify) ____