

YOUTH TOURISM IN SOUTH AFRICA: THE ENGLISH LANGUAGE TRAVEL SECTOR

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Language travel has gone largely unnoticed as a key contributor of youth tourism. The global language travel market is dominated by the UK and the US, with Canada, Australia, Ireland, Malta, and New Zealand also recognizing the importance of language travel for tourism. Little attention has been paid to language travel in research, including in South Africa. This article reviews the organization and development of the language travel industry in South Africa as an important aspect of the country's youth tourism economy. South Africa's language travel industry is explored in terms of its global position, development, size, key role players, structure, operation, and significance for the broader tourism industry. It is shown significant differences exist in the operation and source markets between inland and coastal language schools.

Key words: Language travel; Youth tourism; South Africa

Introduction

Until recently youth tourism has been acknowledged as the “poor relation of international tourism” (Richards & Wilson, 2005, p. 39). It has emerged as a recognized contributor to the global tourism economy, largely due to the growing desire for travel among the youth as well as their increasing spending power. Studies have shifted focus to include “youth and student travel as a mass global phenomenon, which is an increasingly attractive market” (Richards & Wilson, 2003, p. 8). Globally, the youth travel market represents 20% of inter-

national arrivals and valued at approximately US\$136–139 billion. The number of youth travelers is expected to more than double to 300 million arrivals by 2020 (Jones, 2008; United National World Tourism Organization [UNWTO], 2008). Richards (2008) acknowledges that young people are increasingly traveling more often, to more destinations and spending more than any other group on international travel. This phenomenon is the result of “increased participation levels in tertiary education, labour mobility and overseas study programmes . . . and changing concepts of youthfulness” (Richards & King, 2003, p. 1).

Although student travel and activities add considerable economic value to the tourism economies of destinations the student market is one of the most underestimated youth markets globally. The global demand for international student places is estimated to “increase from about 2.1 million in 2003 to approximately 5.8 million by 2020” and the demand for places in the main English-speaking destinations is forecast to increase from “about 1 million to 2.6 million places” (Böhm et al., 2004, p. 4). In the US alone, international students contributed US\$17.6 billion in the academic year of 2008–2009 and nearly \$20 billion in the ensuing academic year (Institute of International Education, 2010; Ketterer, 2009). Key contributions made by international students to destinations relate to tuition, living expenses, and travel costs. Students also generate a significant Visiting Friends and Relatives (VFR) market. In one Australian study, 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). The additional spend by VFR provides added economic value to the student and youth market.

Recently, language travel has become a rising sector of the global youth travel market. Language learning, particularly the English language, has become essential in the context of globalization processes and opportunities for cultural exchange. Many countries are “actively developing language tourism as a major incoming market” (UNWTO, 2008, p. 67). This is evident in the UK, US, Canada, and Australia, where tourism planners and policy makers have acknowledged the importance of the language travel market. It is against this backdrop of international recognition of the significance of language travel that the article analyzes the development, size, structure, operation, and significance of the South African language travel industry.

Over the past decade several studies have been undertaken highlighting the importance of youth tourism in South Africa, in particular of the segments of backpacker tourism and volunteer tourism (see Rogerson, 2007, 2010, 2011; Visser, 2003). Nevertheless, with the exception of Boekstein’s (2010) work on language travelers to the Western Cape, there has been no previous investigation of the South African language travel industry. Methodologically, the article draws from desktop re-

search of the international context of language travel, the establishment of a data base of all language schools in South Africa, and most importantly the findings from 33 interviews conducted during 2010 with directors of language schools as well as 75 questionnaires completed by language students at five separate schools in Cape Town, Johannesburg, and Pretoria (Correia, 2011).

International Context

Studies on language travel are spread across the scholarship of both educational tourism and youth tourism. Learning a foreign language in combination with travel originates in the Grand Tour days of the 1500–1600s and more recently in the late 19th century where leisure tourism formally emerged as a means of education (Brodsky-Porges, 1981, p. 177; Ritchie, 2003, p. 10; Benson, 2005, p. 135). Modern educational tourism has progressed to include an array of different activities and interest groups. More people are looking for holidays in which they can actively participate in something educational, which can include anything from “wine tasting to environmental field studies, but increasingly it is learning a new language, particularly English” (Boekstein, 2010, p. 91). The language travel market has become a niche tourism market in recent years, particularly for destinations with national languages that include English, Spanish, and French. The economic impact of language students on tourism spending and in the broader economies of language learning destinations has gained considerable recognition of late. Many language students often stay in local communities, particularly in “home stays,” and “spend money directly with local suppliers, increasing the economic impact of their stay” (Richards, 2009, p. 6). This trend is supported by Son (2002, p. 235), who argues that language students are also likely to stay for longer periods of time, effectively spending more in total than other more “traditional” tourist types.

According to Richards (2009), the “total value of the (global) language travel market can be conservatively estimated at US \$8 billion a year (or almost 7% of the global youth travel market) (p. 1). For 2009, the *Language Travel Magazine* released statistics valuing the global language travel market

at over US\$11.7 billion (Norris, 2010, p. 50). Such figures are difficult to confirm, however, due to the lack of accurate records in language travel destinations where the language travel industry is not adequately recognized or monitored.

Figure 1 depicts the geographic distribution of the global language travel market based on the statistics published by the *Language Travel Magazine* (Norris, 2010, p. 51). It is evident that the largest share of the global market is dominated by the UK (41.9%). The second largest share of the market is represented by the US (17.8%). These market shares are followed in descending order by Canada (13%), Australia (10.5%), Ireland (7.4%), Malta (5.2%), and New Zealand (2.8%). South Africa is a new destination in the global language industry and ranks eighth, with an estimated market share of 1.4%. Internationally, the core source markets for English language learning include China, Japan, Korea, Taiwan, Brazil, Mexico, Italy, Spain, and Saudi Arabia.

The local importance of the language travel industry is evident in the UK, which in 2004 earned

approximately £1400 million (Richards, 2009). As the world’s largest destination for English language learning travel, the UK has sought to support the growth of this sector of youth tourism.

Likewise, the US also recognizes the educational industry as a crucial contributor to the country’s economy. In the academic year of 2009/2010, the country generated a total of US\$18.8 billion from the international student market. The US recognizes that Intensive English Programs (IEPs) are “the gateway to US higher education,” feeding into larger economic opportunities (American Association of Intensive English Programs, 2003). As a consequence of the 2001 terrorist attacks and 2003 SARS outbreak, however, the national government tightened visa restrictions and lengthened process times, making it more difficult for students to enter the country. In this regard, the US higher education industry lobbied 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).

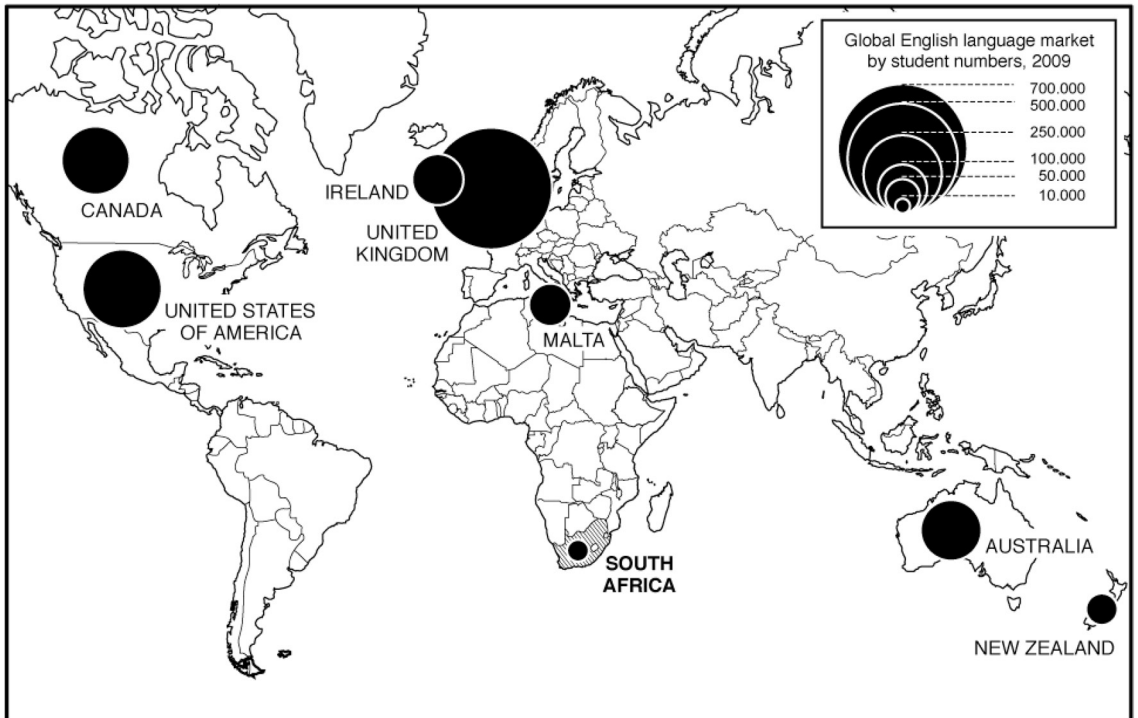


Figure 1. Global English language market share by student numbers, 2009 (adapted from Norris, 2010, p. 51).

Australia is another popular destination for educational travel as a whole and acknowledges the promotion of English language learning as important within the context of the international education sector (Pearce & Son, 2004). 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, p. 342). This is confirmed by Blundell (2009, p. 8), who points to language students “for whom tourism activities are an integral aspect of their program” within Australia. Tourism planners in Australia recognize the significance of educational tourism as a form of tourism that has expanded especially since 2000. One report reveals that over 45% of the growth in expenditure from all international visitors to the country is as a result of international education visitors (Jackson, 2009, p. 18). Australian Education International (2006) highlights that ELICOS (English Language Intensive Courses for Overseas Students) is important for the study pathways of potential international students that are likely to return in order to pursue tertiary qualifications, thus further increasing the potential long-term economic value of the education tourism market. Although New Zealand is overshadowed by Australia’s student numbers, it is also a growing English language learning destination with a 2.8% share of the global market. One recent study by Statistics New Zealand (2010) recorded a total of 41,798 international students enrolled in English language courses in New Zealand for the year ended March 2010, a 13% increase from the previous year. Other significant language travel destinations for English language learners include Canada, Ireland, and Malta. The latter is distinguished by the fact that in 1996 it became the first country to regulate its language learning industry (Federation of English Language Teaching Organisations Malta [FELTOM], 2008).

The recent global economic crisis revealed that the global language travel industry performed slightly better than the general international tourism market in 2009. This is the result of the proactive responses by language travel destinations and governments in an effort to secure and increase their market share (Richards, 2009, p. 2). Internationally, the language travel industry, like any other industry, faces certain challenges that threaten its

growth. Although these barriers to growth vary between destinations, Richards (2009, pp. 7–9) identifies certain common challenges that tend to occur across the industry. These include strict and lengthy visa regulations and processes that may result in learners opting for an alternative destination and concerns about quality of accreditation. Associations of language schools have been established in order to legitimize the industry. The expansion and consolidation of ownership of schools has resulted in franchising and the development of internationally recognizable brands, which assisted to address issues of quality and resulted in increased competition, particularly for smaller language schools. Overall, the language learning industries of several countries struggle with lack of recognition and support from government, the need for diversification in product offerings due to increased global competition, and the imperative for innovation in marketing with the rise of social media.

Language Travel in South Africa

South Africa’s participation in the global language travel industry is relatively recent. It was only after the 1994 democratic transition that the country began to receive youth travelers and become a competitor in the language travel market in particular. The country is considered a favorable language learning destination due to it being perceived as “cheaper than other countries” and having “fantastic wildlife, awesome scenery and welcoming people” (Evans, 2008, p. 68). In South Africa, the language travel market is seen as a component of youth travel where language learners represent part of the “independent travel sector.” The country is fast becoming a favorable destination for English as a Foreign Language (EFL) learners (Baker, 2004, 2008; Smith, 2009). South Africa’s competitive advantages relate in particular to it being more affordable than other more established language learning destinations. In addition, the country has become more recognizable due to the activities of the national association, EduSA (Education South Africa, formerly Eltasa). This particular association serves as a platform for associated language schools in the country and aims to guide and grow the country’s language travel industry. The need to understand the significance of the lan-

guage travel industry in South Africa has become more urgent with the recognition of educational tourism as a niche market by the national government.

This study was based on an initial compilation of a database of existing language schools. An Internet search revealed the existence of a larger population of language schools than simply the 17 schools that were associated with EduSA (the national association for educational tourism). In total, it was revealed that in 2010 there were 52 different language schools in operation throughout the country. These language schools are highly geographically concentrated with major clusters around the inland cities of Johannesburg and Pretoria but with the majority of language schools concentrated in the Western Cape. Figure 2 indicates the spatial distribution and highlights the concentration of language schools across South Africa. It is evident that the industry is urban based and focused in Cape Town

(26 schools), Pretoria (10 schools), and Johannesburg (6 schools). The remainder of the language schools are scattered along the western and eastern coasts of South Africa in Port Elizabeth, Jeffrey’s Bay, Stellenbosch, Grahamstown, Plettenberg Bay, Durban, and Pietermaritzburg.

Overall, Cape Town is the leading destination for youth tourism in South Africa and the leading destination for language travelers. The city is a favorable language learning destination due to its “breathtaking beauty,” “so many diverse activities,” and a melting pot of different cultures (Evans, 2008, p. 67). The ability of learners in Cape Town to combine language courses with other leisure activities such as visits to the winelands, cage diving, whale watching in Hermanus, visiting world-renowned attractions such Table Mountain and Robben Island, or going on a Cape-based safari makes the Western Cape highly appealing to language learners, particularly from Europe but also

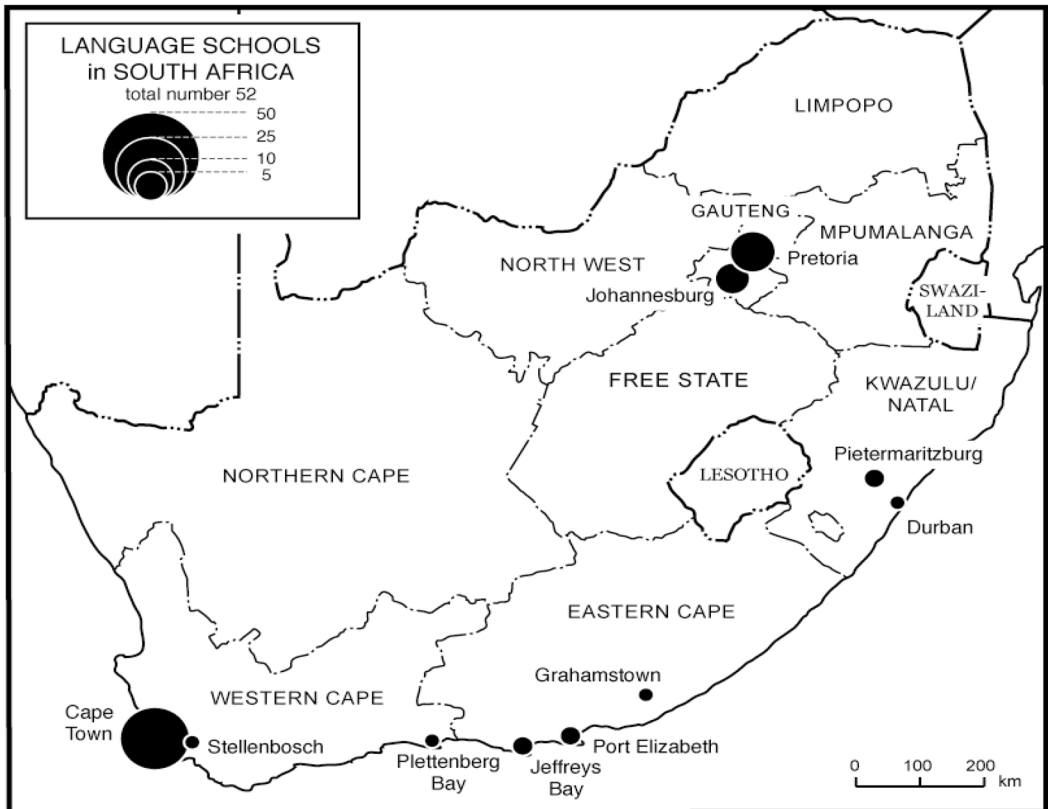


Figure 2. Geographic distribution of South African language schools.

increasingly so from Brazil and Angola. Other coastal destinations offer activities such as surfing lessons in Jeffrey's Bay as well as a year-round good climate in Durban, allowing for activities such as surfing, whale, dolphin, and shark watching, and "authentic" Zulu cultural experiences (Evans, 2008, p. 67). By contrast to the coastal schools are the group of inland schools in Gauteng's two major centers, Pretoria and Johannesburg. The research showed that inland schools have a different focus, particularly in targeting students from other countries in sub-Saharan Africa due to the proximity of major cities such as Johannesburg and Pretoria and being accessible through the country's major international airport (Correia, 2011).

As a whole the research reveals the important finding of the dualistic character of the South African language learning economy. Major contrasts exist between inland and coastal language schools, which offer different products and attract different markets. Inland schools around Pretoria and Johannesburg offer a range of "diplomatic" and "business English" courses that may not necessarily involve participation in tourism-related activities such as visits to local attractions, and largely are targeted at the market of learners from other countries in sub-Saharan Africa. By contrast, coastal schools emphasize the combination of language studies with added leisure components, which attracts students from a range of source markets in addition to African countries.

Nationally, there were two different types of ownership that surfaced: those schools that operate independently and those that operate as part of a larger international organization—(usually) a franchise. The majority (85%) of language schools are independently owned and have only one branch or campus; one exception was of a language school in Cape Town, which operates at two campuses. The language travel industry in South Africa is a relatively new phenomenon. Although the oldest school in the survey had been functioning since 1983, the overwhelming majority of language schools were established only in the postapartheid era. The average length of time that schools had been operating was 8.1 years. For the most part, South African language schools began operations only after 2000. Ownership patterns tended to be stable particularly with inland schools as none of the schools inter-

viewed had changed ownership since their establishment. By contrast, coastal schools tended to be more variable with a small proportion (5% of the schools interviewed) changing ownership since their foundation. The employment of staff was conducted in the same manner by all the schools interviewed. Permanent staff included management, administrative staff, and some teachers. The largest share of teachers was generally hired on a temporary or "as needed" basis, often working for more than one school at a time. Teachers were mostly recruited by word of mouth or through the schools on teacher training courses. It was revealed that coastal schools have a higher ratio of students to staff (66:1) than inland schools (38:1), but that inland schools tended to have a larger pool of temporary staff members and approximately double the number of total staff members than coastal schools.

All language schools offered varying degrees of beginner and intermediate language courses, with only a few offering advanced courses. Despite "diplomatic English" being advertised on numerous Internet pages, particularly for the Pretoria-based schools, none of the schools interviewed offered such a course; interviewees reported that the course was not popular and was ineffective. Business English was prominent in both coastal and inland schools, catering mainly for older students who had been sent by their employers to improve their language skills and particularly popular among Brazilian and Angolan students. University preparation courses for entrance into international tertiary institutions and teacher training courses was more common among coastal language schools. By contrast, the student questionnaires revealed that university entrance as the reason for studying English in South Africa was more prominent among inland students. "Aviation English" was another course offering and only mentioned by coastal schools and mainly attracting students from Saudi Arabia. Other courses on "English for specific purposes" courses largely were offered by coastal schools and included courses designed specifically for the energy, oil, and health/medical industries.

On average, coastal schools offered a wider range of course offerings and of course durations, from less than 1 week and up to a year, than inland schools. Both coastal and inland schools reported that the maximum duration tended to be a year but

there were occasions where students would stay on longer than a year depending on their language needs. Inland schools tended to offer courses of a longer duration overall and the most popular course duration for both coastal and inland schools was 3–6 months on average. This length would allow students to stay on after their course and combine their studies with travel. The student questionnaires indicated that a stay of 7 months to a year was the most popular choice of students, particularly at inland schools. Coastal students did, however, tend to stay for shorter periods of time, opting for stays of 1 or 2 months. Students were asked to stipulate how long they would remain in South Africa after they had completed their course. Coastal students reported an average of an 8-month extension to their stay, while inland schools reported an average of a 31-month extended stay. The significant difference is largely due to the common trend of inland students returning to pursue their studies at a South African tertiary institution.

Overall, language schools in Cape Town, followed by Johannesburg and Pretoria, reported the largest number of language students. On average, coastal schools had more language students than inland schools. Cape Town records the largest schools, with just under 1,000 students per school on average. Inland schools tended to be smaller in size, ranging between 400 and 600 students per school on average. Based upon the interviews the estimated national total of language learners in South Africa for 2010 was 30,500 in total. The largest age cohort of students was between 19 and 25 years, a finding that confirms the role of language learning as part of the youth travel industry. As a whole, it was revealed that the coastal schools attracted a generally older group of students. In the language student questionnaires the average age for coastal students in the sample was 28 years compared to 26 years for inland students. Gender distribution was fairly evenly spread across the country, with a slightly greater representation of male students at coastal schools and female students at inland schools.

Source countries for students included Brazil, Angola, and the Democratic Republic of Congo (DRC). Coastal schools tended to attract more European and South American students (especially from Brazil), as well as from key African markets

including Angola and Gabon. Inland schools, by contrast, attracted the majority of their students from Africa, particularly from DRC, Angola, Libya, Gabon, Rwanda, and Mozambique. Other significant source markets included China and Korea, particularly for coastal schools. Saudi Arabia (for aviation English) and Colombia were identified as emerging markets with considerable growth potential. The results of the student questionnaire confirmed the findings of interviews with directors of language schools that coastal schools attract mostly European and South American students and inland schools attract the majority of their students from Africa.

Language schools interviewed revealed that there is an overall year-round seasonality about language travel. Coastal schools tended to be more variable with important peak periods during the year end summer holidays of November and December and a slight peak during the months of July and August. These patterns coincide with the international student holidays, particularly with European students. January and February are identified as particularly quiet months across the country. Inland schools experienced a more consistent pattern of students with a constant influx of African students, particularly from Gabon. The influx of Saudi Arabian and Asian (China/Korea) students, particularly at coastal schools, tended to be around the July/August period. There was an overall concern from all schools for the need to diversify into other markets in order to combat the variations in seasonal arrivals.

A striking finding was that coastal schools were more likely than inland schools to include tourism-related activities in combination with their course offerings. For the most part, schools organized tours themselves and seldom made use of local tour operators and agents as they found it difficult to establish a relationship with such providers and obtain group or student discounts from local attractions. Such activities were typically charged separately from the course offerings and the itineraries were generally flexible, based on the student desires. Some of the most common forms of extracurricular activities at coastal schools were informal outings and in-house activities organized by the school staff such as pizza evenings, visits to local restaurants, pubs, and cinemas. Tourism-related ac-

tivities include trips to local attractions such as museums, theme parks, nature reserves, and wine tasting, and popular local attractions such as Table Mountain and Robben Island. Coastal schools in the Eastern Cape, at Jeffrey's Bay and Port Elizabeth, combined surfing lessons with morning and afternoon language classes. Nevertheless, the "traveling classroom" concept, which involves traveling around the country or within a province while learning English, was not popular as schools operated mainly from fixed premises. The group of inland schools was least likely to include or organize tourism-related activities in combination with course offerings. If activities were offered, they would generally include local tourist attractions such as visits to the Johannesburg and Pretoria zoos, Gold Reef City, the Apartheid Museum, Soweto, the Union Buildings, or Newtown. The student questionnaires revealed language learners mostly stayed within the province where their school was situated and if they did travel outside of the province where language learning was taking place, it was mainly to surrounding provinces. There was no evidence of students engaging in extended national tours as is common in Australia (Pearce & Son, 2004).

Many of the coastal schools had invested in providing their own accommodation, which would typically either be on campus or within walking distance from the school. This allowed the school to include accommodation in their offerings and provided a supplementary source of business income. By contrast, this was not the case with inland schools where learners would most likely be placed in home stays or in student communes, which were common around nearby universities. These communes were, however, not popular in the results revealed by the student questionnaires. The use of host families was the most common type of accommodation and largely organized by language school agents in the student's country of origin. Guesthouses and hotels were most common among older students or those who had been sent by their employer. Self-catering apartments were used by students who stayed for extended periods of time, particularly those that were in South Africa for up to a year and mostly by inland students. Stays with friends or relatives were common among inland students who relied on friends or relatives already

working or studying in the country. Backpacker accommodation was rarely used by language travelers and was only mentioned by coastal schools and students.

Language schools reported that the Internet was the most important tool for the purpose of advertising and information sharing. The use of language school agents in origin countries was more common with coastal schools. The establishment of relationships with such agents was identified as a key step in sourcing international students, particularly from Europe and South America. More traditional forms of marketing, such as word of mouth, were highlighted as particularly important for inland schools. Local newspapers and radio were rarely used because of high costs. International trade shows, held frequently in Europe and the Americas, were seen as crucial marketing opportunities but also viewed as expensive forms of marketing. Lack of government support for the language travel industry was a common theme with the majority of schools arguing that it was very difficult to obtain support from local and national tourism organizations for assistance with marketing efforts. In common with the language school interview respondents, language students indicated that the Internet was the most common choice when searching for information on language courses and destinations. The student questionnaires confirmed that word of mouth was particularly important among inland language students. Most African students at inland schools stated that they had friends or relatives already working or studying in South Africa. Coastal students were more likely to make use of travel agents or operators when planning their trip. Few students made use of international language school agents or magazines.

Figure 3 represents an attempt to capture overall spending per trip of South African language travelers. It was revealed that the average language traveler spends an amount of R37,314 during their stay in South Africa. This figure significantly exceeds the reported average spending of traditional international tourists of R8,900 in the third quarter of 2010 (South African Tourism, 2010, p. 1). It is therefore clear that the language travel sector is a potentially high value earning segment for the South African tourism economy. If the estimated national language student numbers of 30,500 are taken into

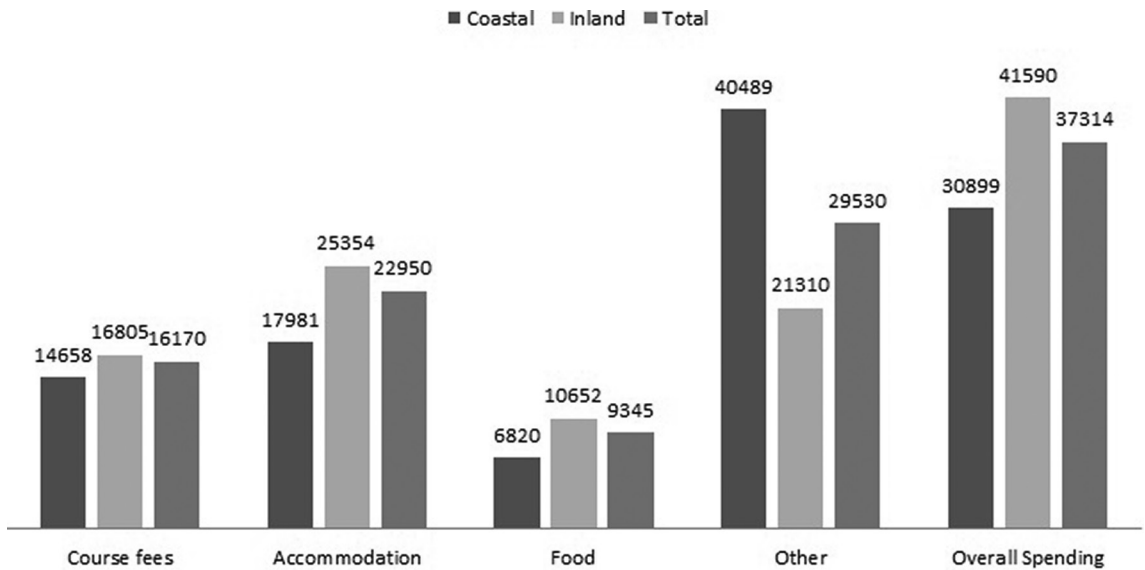


Figure 3. Average language student spending per trip.

consideration, the total value of the South African language travel industry is estimated at over R1.1 billion annually. Accommodation and course fees represent the two most important individual items for expenditure followed by food purchases. The high level of expenditure that is recorded as “other,” which included transport, trips, and entertainment, provides a significant proportion of language student spending. Coastal students were most likely to spend money on “other,” as they were more likely to be encouraged by their school to take part in such activities. Overall, however, inland students spend the most money during their stay in South Africa, averaging almost R10,000 more than coastal students.

Significant challenges to the growth and development of the language learning industry in South Africa were identified by language school interviewees. Of major concern was the existence of an unknown number of “fly-by-night schools,” which tarnished the reputation of the industry as these establishments were simply “jumping on the bandwagon” and to “make a quick buck.” This situation resulted in poor quality offerings that often failed, creating a phenomenon of short-lived schools. The reputations of more established schools were tarnished and it was difficult for such schools to estab-

lish connections with international agents who were skeptical of the quality of language schools in South Africa. Many of the schools avoided being involved in the visa issuing processes other than providing a letter of acceptance for evidence of intent to study. Nevertheless, there were concerns raised about fraud in which visas were obtained by students who did not attend the course as they were simply looking for a means to enter the country. African students, particularly those from Angola, were identified as the most problematic when it came to visa processes. Schools were concerned that the visa processes were “getting really sticky and fussy.” Corrupt bureaucratic procedures, particularly at Home Affairs departments, were also raised as a concern that could pose a “very real threat and challenge.” The issues of crime and safety were of concern for language schools, especially those in Johannesburg and Pretoria. The safety of students provides a challenge for the marketing efforts of schools, especially when dealing with international agents. One Pretoria school reported instances in which they would have to assist students who had been arrested over the weekends for “unfounded” reasons because of police looking for bribes and targeting people who spoke in their native languages, which made them vulnerable. Ac-

cordingly, students were encouraged to speak English wherever possible. Finally, the directors of the language schools affirmed the need for greater support and recognition by government as well as national and local tourism organizations. A typical complaint was that the language travel industry was “not taken very seriously.” Nevertheless, most schools felt it necessary to “team up with tourism” and felt discouraged as it was particularly difficult to establish relationships with local tourism companies and organizations to assist them in their tourism-related offerings that complemented their products and services.

Conclusion

Youth tourism is gaining increasing attention from international scholarship as it is fast becoming one of the most important sectors of international tourism. Student travel, particularly language travel, represents a subsector of youth tourism. This article provided the first detailed profile of the language travel industry in South Africa, which is a new entrant to the global industry of language travel. It was shown that the language travel economy of South Africa is urban based and highly concentrated in the cities of Cape Town, Johannesburg, and Pretoria. In common with the youth tourism economy of South Africa more generally, Cape Town emerges as the “capital” for the subsector of language travel. As a whole, the industry exhibits a dualistic character with sharp divides occurring between the nature of coastal and inland schools. Differences were evident variously in course offerings, source markets for language learners, and linkages to other tourism products. A critical finding related to the spending patterns of language travel students who are in South Africa often for periods of up to 1 year. It was revealed that overall expenditure by language travelers per trip is more than of the long-haul international tourist. This finding points to the language travel sector as a potentially valuable contributor to the South African tourism economy. Accordingly, it is recommended that national government needs to reexamine its neglect of the language travel sector and include support for language learning in South Africa as part of wider initiatives for promoting both youth tourism and educational tourism as a whole.

Acknowledgments

Thanks to Wendy Job for preparing the accompanying maps and to Chris Rogerson of the University of Johannesburg for his support and supervision. An earlier version of this paper was presented at the International Geographical Union Commission on Tourism conference in Stellenbosch, September 2010.

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