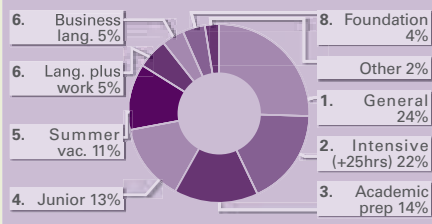


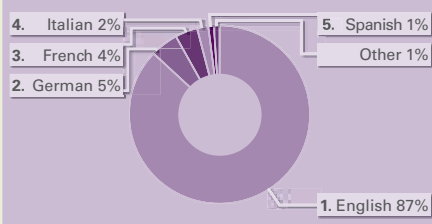
Turkey taking off

Turkish agencies had a good year in 2005 and they are optimistic that with a strong economy and good business planning, they can look forward to a prosperous 2006.

Most popular courses



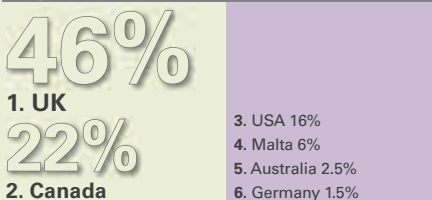
Top languages



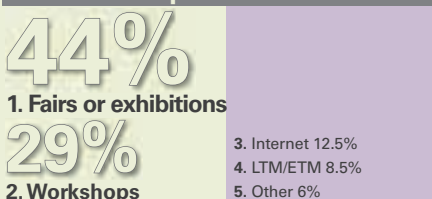
Economic outlook

- The economy has fared well in the last three years and stabilised since 2001, with annual growth rates of around eight per cent.
 - In May last year, Turkey signed a US\$10 billion standby loan agreement with the IMF, which has in turn attracted more foreign investment into the country. Daily trading volumes on the Istanbul Stock Exchange were over 50 per cent higher in January 2006 than in January 2005.
 - In October, parliament passed a IMF-sought banking reform bill that saw the new Turkish lira introduced in January, with six zeros erased from the previous currency. The new lira has gained strength in the world currency rankings.
- Source: Turkish Daily News.

Top destinations



How do agencies find new schools to represent?



Market growth

The Turkish agency market has not been surveyed before in *Language Travel Magazine*, but the indications are that 2005 was a good year and based on the recent economic history of Turkey, it seems that many industries are enjoying a surge of business as the economy gains strength. Factors such as planned membership of the European Union and the introduction of the new Turkish lira are also reported to be building economic confidence. Eight of the 11 agencies that took part in our survey reported a growth in business of between 10 and 65 per cent last year, compared with 2004, while three others indicated that business had remained at the same pace. Overall, average market growth across all agency businesses was 24 per cent – and economic confidence and the rise in popularity of work placements were two reasons given for this performance.

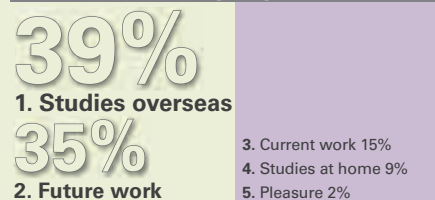
Language and destination trends

The UK is the most popular destination, accounting for almost half of all bookings. This is followed by Canada, then the USA and Malta – one country that is expected to build its market share, said one agency, because of its easy visa regulations. It follows that English was the language most in demand, requested by 87 per cent of clients. Australia was not high up on the list for students (requested by 2.5 per cent of clients overall) and New Zealand and Ireland barely registered as popular study destinations.

Student and course trends

The main motivation for students to study a language overseas was as a pathway

Reasons for language travel



How do agencies recruit students?



Key points

- The total number of students placed by the 11 agencies in our survey was **3,852**
- Individual agencies placed between **24** and **950** students on language courses each year
- Average business growth was **24 per cent**
- The average length of stay for Turkish students was **15 weeks**
- One** agency charged its clients a handling/processing fee
- The UK** was the most popular destination for Turkish students
- In the last 12 months, agencies had worked with an average of **175 schools** each
- Two-thirds of agency clients requested **host family accommodation**

to further studies in another country, and indeed one agent pointed out that a lack of availability of university places in Turkey was fuelling demand at his agency. After general and intensive language programmes, academic preparation programmes were at number three, accounting for 14 per cent of all placements. This is markedly different to a market such as Poland, for example, where academic preparation programmes did not figure in programme requests (see *Language Travel Magazine*, January 2006, page 14).

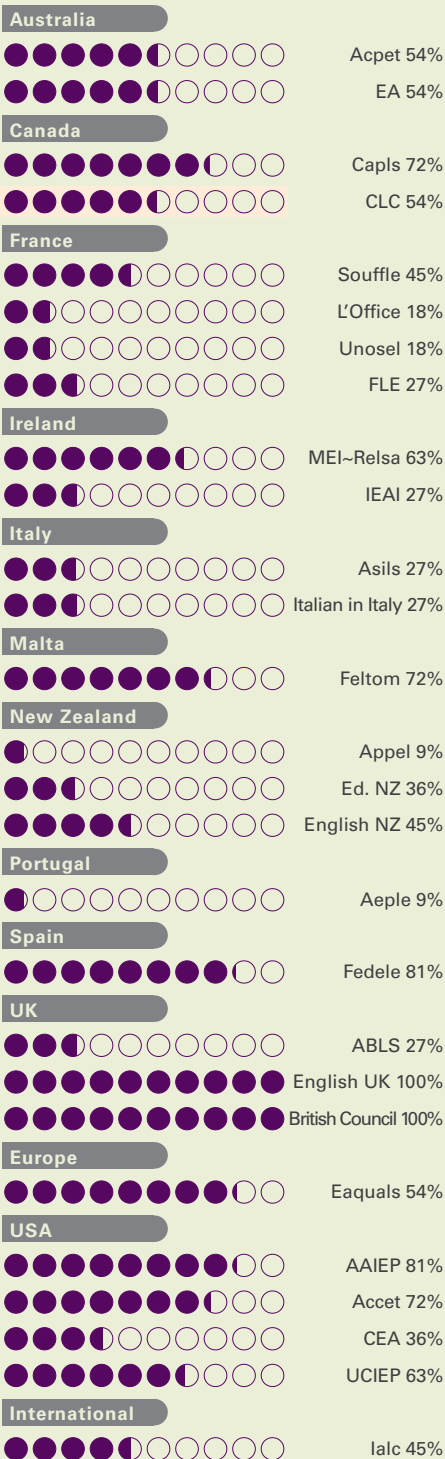
Agency business

Agencies in Turkey recruit most of their clients via word-of-mouth recommendation (40 per cent), while their websites are the next most important recruitment method (25 per cent). Mailshots and seminars to interested students were also fairly important to the marketing mix of agencies. In order to find new school partners to work with, fairs and exhibitions were reported to be the main focus, leading to 44 per cent of all new partnerships. Workshops, the Internet, and sourcing schools via *Language Travel Magazine* and *Education Travel Magazine* were other methods of building business.

Looking ahead

At present, there is a tangible confidence in the Turkish market. Agencies forecast further growth of between 10 and 30 per cent, or at least are confident of maintaining numbers in the current economic climate. A number of respondents underlined future plans such as more aggressive marketing, an expansion of offices, a continued focus on work placement or further investment in the Internet.

Percentage of agents who recognised each of the following organisations



Turkish agents named a range of language programmes they work with, including, in Australia: Uniworl English College, Sydney, NSW; **In Belgium:** CerantLingua, various; **In Canada:** Algonquin College, Ottawa, ONT; Canadian College of English, Vancouver, BC; East Coast School of Languages, Halifax, NS; ESH, Toronto, ONT; ILAC, various; King George International College, Vancouver, BC; LSC, various; Pacific Language Institute (PLI), various; **In France:** Ecole des Roches, Paris; **In the USA:** ELS Language Centers, various; Kaplan, New York, NY; LSJ, New York, NY; New England School of English, Boston, MA; UCLA, Los Angeles, CA; University of San Diego, San Diego, CA; Zoni Language Centre, New York, NY; **In the UK:** Bell Language Schools, various; Cambridge Academy of English, Cambridge; Churchill House, Ramsgate; Lines Languages, various; Lydbury English Centre, Lydbury, Regency College, Brighton; SES Folkestone, Folkestone; Severnvale Academy, Shrewsbury; St Giles Colleges, various; **Worldwide:** Aspect; Eurocentres.

Thank you to the following agencies for taking part in our survey: Alternatif; Blitur Educational Travel Agency; CDS; Edoon Education Consultancy; Galata Education Consultancy; Global Visions International Education; Hamle Consultancy; Horizon International Education Consultancy; Intervega Education Services (IES); Monat International Education Consultancy; Yero International Education.