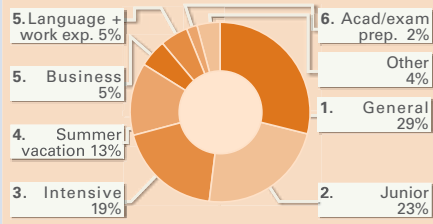


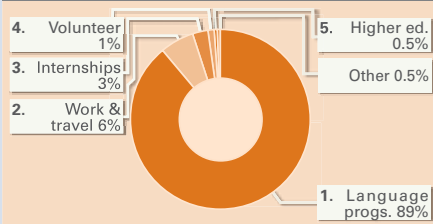
Italy feels the pinch

Economic and political troubles had a negative effect on the study abroad industry in Italy last year, although agents hope that new programmes and increased marketing will bring in new business over the next 12 months.

Most popular courses



Average percentage agency business

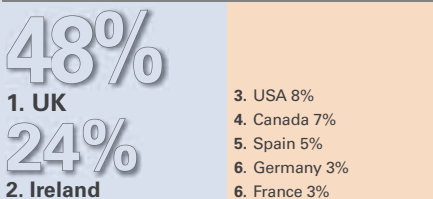


Economic overview

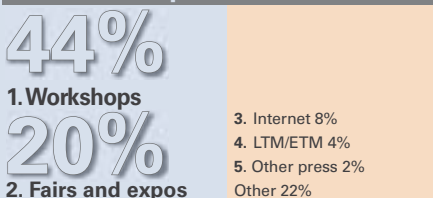
- Italy's economy has slowed along with many other countries worldwide as a result of the downturn in the US property market in 2007. It is expected that Italy's economy will expand at an annual rate of around one per cent in 2008 and 2009.
- Consumer inflation is expected to average just over 2.5 per cent in 2008, dropping to around two per cent at the end of the year. This reflects the price increase in world crude oil and agricultural goods.
- Exports are likely to expand at a slower pace than international trade, reflecting the loss of price competitiveness of Italian goods, which is forecast to continue in 2008 and 2009.

Source: Banca D'Italia

Top destinations



How do agencies find new schools to represent?



Market growth

For the 14 agents taking part in this year's Agency Survey on Italy, business growth was very mixed and overall grew by just four per cent across the board. Three agencies actually reported a decrease in their business volume in 2007, of between six and 20 per cent. Others reported muted growth of between two and 30 per cent while one agency said that their business had stayed the same. Agents who gave a reason for any decline in their business pointed to an "uncertain economic and political situation in Italy" and the fact that Italian families no longer have so much disposable income to spend on overseas language travel trips.

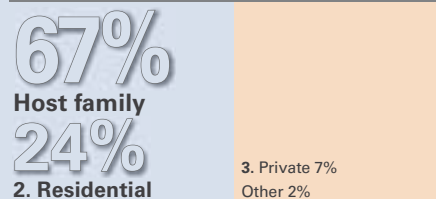
Language and destination trends

The top four language travel destinations for Italian students were all English speaking countries this year, with the UK taking top position and Ireland gaining a greater market share – namely 24 per cent, compared with 20 per cent in last year's survey (see LTM, January 2007, page 16-17). In our previous survey, Spain was the fourth most popular destination for Italian students, taking six per cent of the market share, but this year Spain attracted just five per cent of the market, behind Canada on seven per cent. Spanish was still the second most requested language after English for Italian language travellers. Meanwhile, German was chosen by four per cent and just two per cent of agency clients requested to study French.

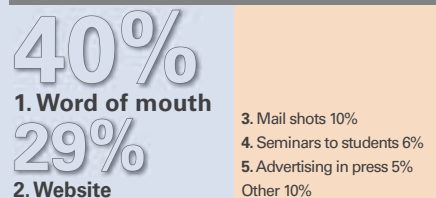
Student and course trends

The Italian student market is an important one for language schools specialising in short-term general, summer vacation and junior courses

Accommodation choices



How do agencies recruit students?



Key points

- The total number of students placed by 12 of the 14 agencies taking part in our survey was **9,667**
- Individual agencies placed between **30** and **4,500** students on courses per year
- Average business growth was **4.2 per cent** in the last 12 months
- The average length of stay for Italian students was **2.5 weeks**
- Overall, **67 per cent** of Italian students stayed with host families when studying overseas
- Three agencies charged their clients a handling fee of between **€30 (US\$44)** and **€70 (US\$102)**
- On average, agencies worked with **21 schools** in the last 12 months

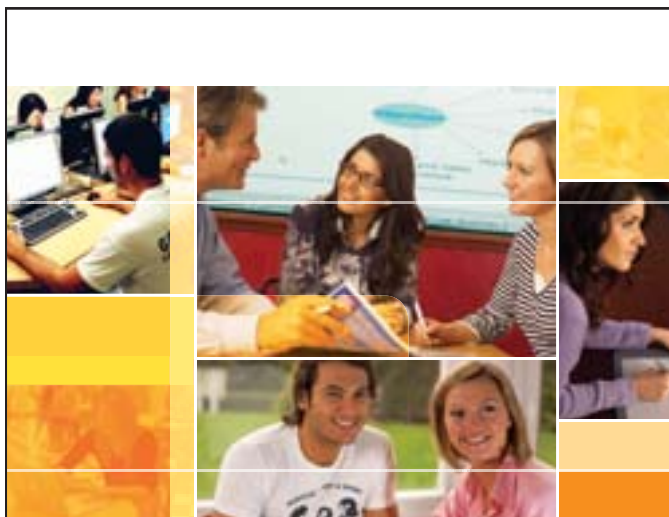
as over 65 per cent of agency business was for these types of courses. The average length of stay at 2.5 weeks was quite low compared with other student markets, for example, Russia, where the average length of stay is eight weeks (see LTM, February 2008, pages 14-15). Italian students showed little interest in language programmes with an academic focus this year and work programmes also decreased in popularity – chosen by five per cent of clients compared with seven per cent in our previous survey.

Agency business

Agencies in Italy rely heavily on word of mouth to attract new clients, with this method accounting for 40 per cent of new business, slightly down on the 46 per cent recorded last year. Instead the Internet increased in importance as a recruiting tool, from 26 per cent previously to 29 per cent in this year's survey. Language travel placements dominate agency business in Italy, with 89 per cent of business taken up with advising students about such programmes and a further nine per cent of business relating to work and travel or internship programmes. Higher education programmes overseas are not very popular with Italian students, making up just 0.5 per cent of overall business.

Looking ahead

Many agencies reported that they hoped business would remain stable in 2008, with the current economic conditions making things difficult for everyone. One agency predicted that interest in language programmes combined with work opportunities would increase and another said they would be increasing the number of workshops they attended in order to expand their portfolio.



Hand picked from the best English language schools

United Kingdom

- Anglolang Academy of English, Scarborough
- BEET Language Centre, Bournemouth
- Cambridge Academy of English
- Churchill House, Ramsgate
- Eastbourne School of English
- Eckersley Oxford
- English Language Centre, Brighton and Hove
- Excel English, London
- Frances King School of English, London
- ILS English, Nottingham
- Lake School of English, Oxford
- Lewis School of English, Southampton
- London School of English, London
- Millfield English Language Holiday Courses
- Wimbledon School of English, London

Ireland

- ATC Language and Travel, Bray, Dublin
- Cork English College
- The Linguaviva Centre, Dublin

New Zealand

- Auckland English Academy
- Languages International, Auckland and Christchurch
- Rotorua English Language Academy (RELA)

Canada

- Access International English Language Centre, Toronto
- Vancouver English Centre

South Africa

- Interlink School of Languages, Cape Town

Malta

- Clubclass Residential Language School
- Global Village English Centre

Bosnia

- Soros School, Sarajevo

Poland

- York School, Krakow

Turkey

- British Side

QE events for Agents 2008

- QE invites agents in Japan to meet the QE schools on **21st May in Tokyo**
- QE invites agents in the Ukraine to meet the QE schools on **7th October in Kiev**

For further information: agents@quality-english.com

Agents can be sure of

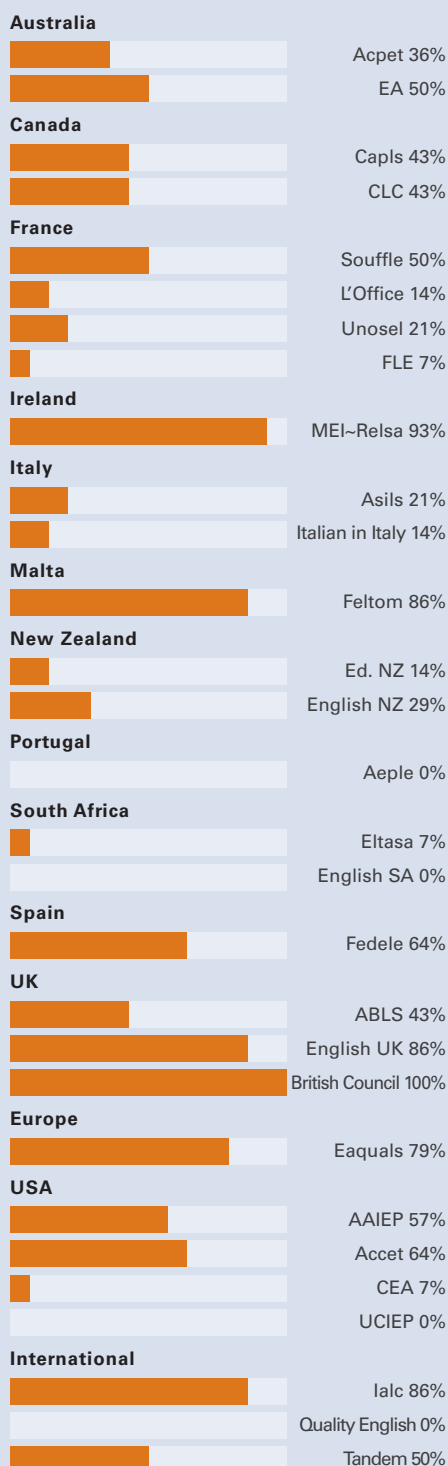
- a fast and flexible response
- a strong partnership with the decision makers
- a commitment to individual service and attention

www.quality-english.com



Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations



Italian agents named a range of language programmes they work with, including, in Canada: Language Studies Canada, various; **In France:** French in Normandy, Rouen; **In Germany:** BWS Germanlingua, Munich; Sprachcaffe, various; **In Ireland:** Atlantic Language School, Galway; Cork English College, Cork; Horner School of English, Dublin; Pace Language Institute, Bray; **In Spain:** IH Madrid, Madrid; **In the UK:** Churchill House School, Ramsgate; EAC, various; ELC, York; English Language Centre, Bristol; English Language Training, London; Hampstead School of English, London; Hilderstone College, Broadstairs; OISE, London; Oxford English Centre, Oxford; Regent, various; Twin, London; **Worldwide:** Embassy CES; Geos; Kaplan Aspect; International House; St Giles.

Thank you to the following agencies for taking part in this survey: 3 Esse Agency, Across the World, ALCE Study Abroad, ALP Corsi di Inglese, Auriga Servizi, Coming, Drion Viaggi, Education Consultants SAS, Indirizzo Inghilterra, Leitmotiv - London School Parma, Mundolengua, New Lands, New Beetle - Thema Viaggi, World Travellers.