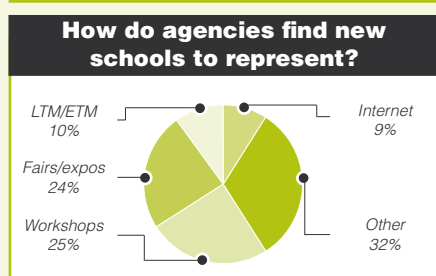
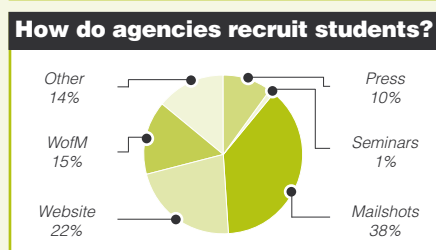
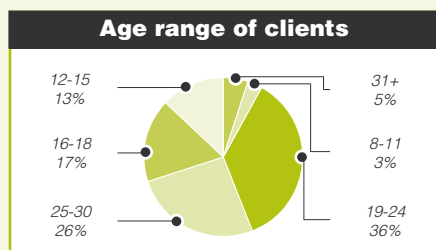
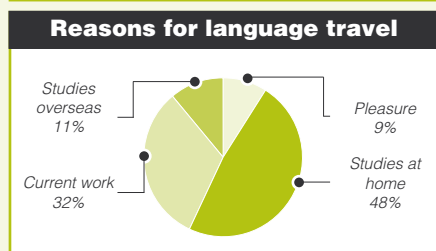
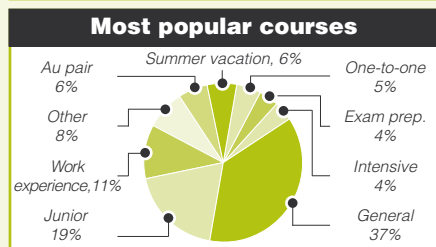


Spain grows

After a rather sluggish year in 2003, the Spanish language travel market has regained momentum in 2004, according to the agents who took part in our Agency Survey on Spain this year.



- ### Key points
- The total number of students placed by the 10 agencies in our survey was 4,341
 - Individual agencies placed between 100 and 1,350 students on language courses a year
 - Average growth of agency business was 8.3 per cent in 2004
 - The average spend on tuition and accommodation per week was €535.8 (US\$657.4)
 - None of the agencies that took part in our survey charged a handling fee
 - The average length of stay was 5.1 weeks, up from 4.8 weeks last year
 - Around 67 per cent of students took their language course during July and August

Market growth

The Spanish language travel market has picked up in 2004, with overall market growth across all 10 of the agencies that took part in our survey reaching just under nine per cent, in comparison to a 3.5 per cent increase in 2003 (see Language Travel Magazine, September 2003, pages 12). Closer analysis of the results reveals that, whereas in our 2003 survey 20 per cent of respondents recorded a decrease in client numbers, this year all of the agencies that took part experienced either an increase in enrolments or static numbers. One agent put their healthy performance down to the fact that they offered work experience programmes for which there is now strong demand.

Student trends

Just under half of language travellers in Spain decided to embark upon a language trip overseas for their studies at home, while a further 32 per cent were learning a language for work. This was down from 50 per cent in last year's survey. Most Spanish clients were in the 19-to-24 year old age group, which accounted for 36 per cent of clients. The 12-to-15 year old age group seemed to

have gained in importance, accounting for 13 per cent of bookings compared with seven per cent last year. Three agents in our survey also identified juniors as holding the most growth potential for the future, and indeed, junior courses were the second most popular type of programme this year.

Destination trends

Just under 87 per cent of agency bookings were for English language courses, with French, German and Italian programmes accounting for a combined 13 per cent of agency business. The UK was the number-one language travel destination, although its share has dropped from 53 per cent last year to 43 per cent this year. Ireland was the second most popular destination, followed by

Malta, which increased its one per cent share in 2003 to six per cent.

Agency business

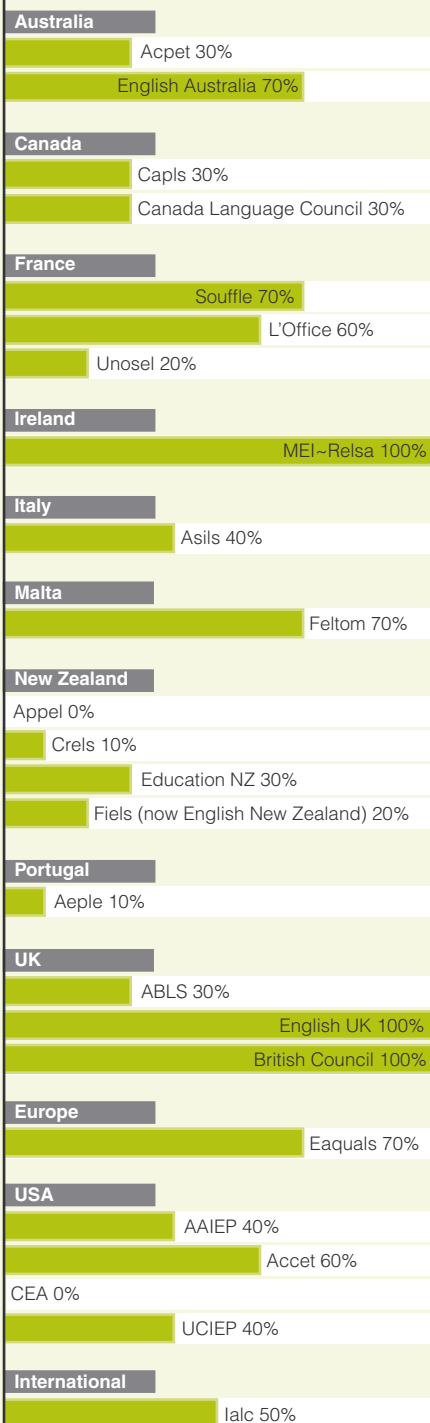
Agencies rated word-of-mouth recommendation as their most important client recruitment tool, accounting for an overall 38 per cent of customers. The Internet is also becoming more important to agencies, attracting an estimated 22 per cent of clients in 2004, compared with 17 per cent in 2003. Agents estimated that only 47 per cent of clients had a fixed idea about which country they wanted to study in before consulting them, 25 per cent had decided in which town or city they wanted to study and three per cent the school. After a consultation with an agent, our respondents estimated that 23 per cent changed their minds about their chosen country, 24 per cent the city and 17 per cent the school.

Looking ahead

With a stable economy, the prognosis for the future is upbeat. Demand among young adults for work experience and au pair programmes overseas looks set to continue to grow, while the junior sector is also likely to remain healthy.

- ### Economic overview
- Spain's economy and employment growth rate have been increasing above the European average in recent years. Average income per capita is now 85 per cent of the European average.
 - Low interest rates, falling unemployment and rising public works spending has stoked consumer spending and construction.
 - Spain's GDP stood at 2.6 per cent in the second quarter of 2004. Although still satisfactory, the economy's expansion slowed during this period.
 - Spain's unemployment rate has been dropping in recent years and stood at 11 per cent in July 2004.
 - The inflation rate for the euro area as a whole stood at 2.4 per cent in June 2004.
- Source: Banco de Espana; Business Facilities; International Herald Tribune

Percentage of agents who recognised each of the following organisations



Spanish agents named a range of language programmes they work with, including, in Australia: Aspect, Sydney; Centre of English Studies, Dublin; Geos, Dublin; Language Centre of Ireland, Dublin; Limerick Language Centre, Limerick. **In Italy:** Torre di Babele, Rome. **In Malta:** EC, St Julians; Institute of English Language Studies, Sliema. **In the UK:** Angliang Academy of English, Scarborough; Cambridge Centre for English Studies, Cambridge; Churchill House, Ramsgate; Concord International, Canterbury; English Language Training, London; LSI, London; Oxford House College, London; Project International, London; St Giles, various; Scanbrit School of English, Bournemouth; Studio Cambridge, Cambridge.

Thank you to the following agencies for taking part in our survey: Babel Idiomas; British Summer; CEAE; EBI Idiomas; Educare Idiomas; High Educational Studies; Interlink; New Link; Red Central Agency, Zona de Ocio Idiomas.