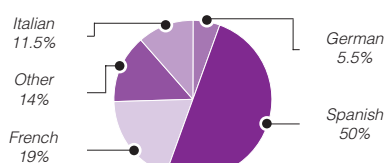


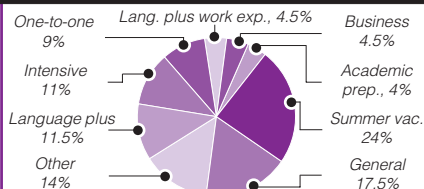
# USA interest

Our survey paints a picture of American students interested in studying abroad for their college studies or for their own pleasure, with activity-led learning being a popular course choice. With an improving US economy, agencies hope that more clients may see the appeal in an international learning experience.

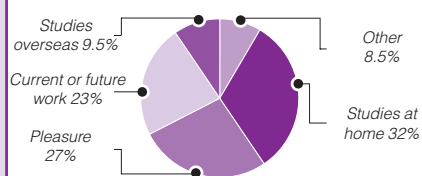
## Top languages



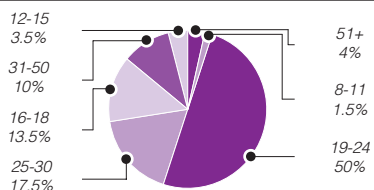
## Most popular courses



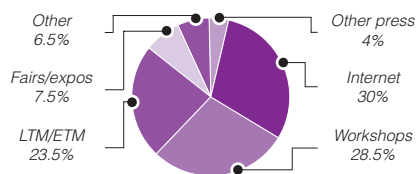
## Reasons for language travel



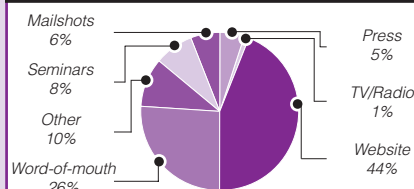
## Age range of clients



## How do agencies find new schools to represent?



## Client recruitment



## Key points

- The total number of students placed by six of the eight agencies in our survey was 3,470
- Individual agencies placed between 70 and 1,700 students on language courses per year
- Average growth of combined agency business in 2003 was six per cent
- The average spend on tuition and accommodation per week was US\$333
- On average, agencies represented 51 language schools overseas in 15 countries
- Commission rates paid to agencies ranged from 10 to 25 per cent
- Almost half of all agency clients took a course abroad in June, July or August
- Only 44 per cent of clients requested host family accommodation

## Market growth

Agencies reported different experiences in terms of business growth in 2003, but those that did report a slowdown in bookings, in comparison with 2002 (from 10 to 20 per cent), pointed to the state of the US economy and concerns about the war in Iraq as reasons. One agency also mentioned that there had been an increase in direct enrolment to schools. Those that indicated they had seen an increase in bookings (from 10 to 50 per cent) attributed this to their own marketing efforts. Overall, the average growth rate recorded across all agencies was six per cent.

## Student trends

Most students studying abroad tended to be in the 19-to-24 age category, according to our respondents, with 50 per cent in this age category, compared with 35 per cent in our previous survey (see *Language Travel Magazine*, December 2001, pages 16-17). However, while studies at home motivated 32 per cent of students to study abroad, as might be expected with so many college-aged students, a high proportion of agency clients also studied a language overseas for pleasure only.

## Course and destination trends

Spanish remained the number-one language requested by agency clients, accounting for half of all placements, and the range of countries represented by agencies included Guatemala, Costa Rica, Ecuador and Mexico as well as the more traditional – and popular – destination of Spain. France, Russia, Germany, Italy, and even Ghana were also mentioned by agencies as destinations offered. The most popular types of courses requested were summer vacation, general and intensive, with activity-led “language plus” courses also featuring high up on the list. Exam pro-

grammes only notched up one per cent of demand, indicating little demand for university entrance overseas.

## Agency business

The Internet is an integral part of business for US study abroad agencies. An agency's website was the most important student recruitment method overall, while agencies also used the Internet as a key source of new business opportunities. They found 30 per cent of new business partners on the web, while workshops and *Language Travel Magazine* were also important sources. Agencies represented between 16 and 129 schools, in up to 43 different countries.

## Economic overview

- There are hopes that the US economy will continue to show signs of growth following the news that in the third quarter of 2003, GDP grew by 8.2 per cent – the fastest rise for 20 years. President Bush claimed the news signified policies were working, but economists are cautious about a sustainable economic recovery.

- Real personal consumption expenditures increased 6.4 percent in the third quarter of 2003, compared with an increase of 3.8 percent in the second. Growth in the US economy is largely attributed to increasing consumer confidence.

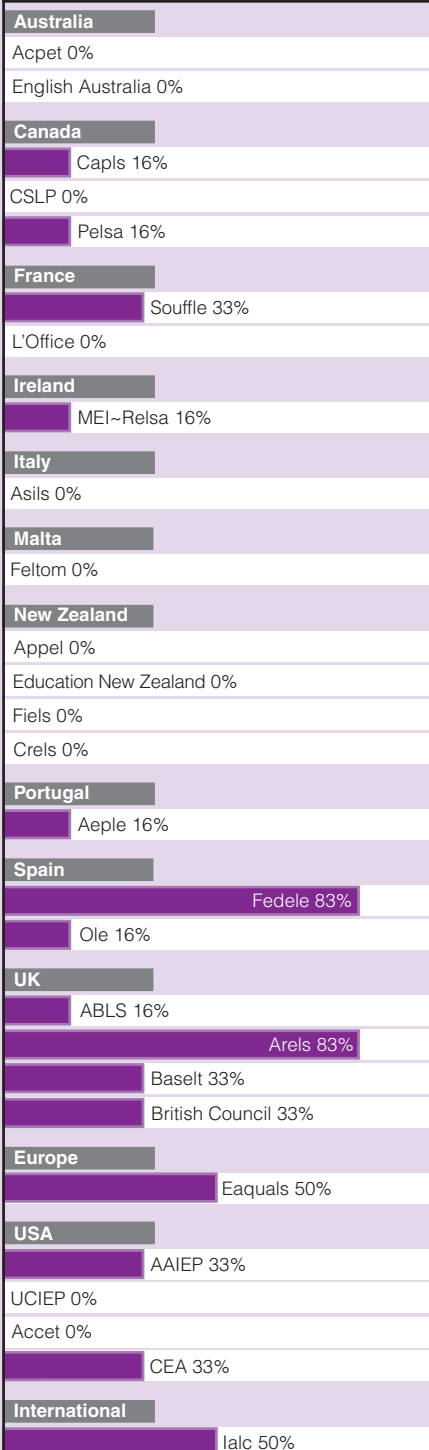
- Employment prospects are also reported to be improving in the USA and this is a crucial ingredient for economic prosperity, say economists. First-time applications for state unemployment benefit rose to their lowest level in November since January 2001, before the economy slipped into recession.

Source: Bureau of Economic Analysis - U.S. Department of Commerce; FT.com; USA Today; AP.

## Forecast for 2004

Agencies attest that study abroad is gaining in popularity and many are hopeful that business may improve this year. Some agencies report that they are adding new programmes to appeal to a wider client range. One agency noted that language plus programmes and those offering something different, such as alternative-style accommodation or academic credits, would be most popular and effective in growing business.

## Percentage of agents who recognised each of the following organisations



**US agents named a range of language programmes they work with, including, in Costa Rica:** Intensa, San Jose; Intercultura, Heredia; Veritas University, San Jose. **In France:** BLS, various; Ecole France Langue, Paris; University of Burgundy, Dijon. **In Ecuador:** Academia de Español Quito, Quito. **In Germany:** Sprachcaffe, various. **In Ghana:** Dagbe Cultural Center, Kopeya. **In Guatemala:** FLM, Antigua. **In Honduras:** CASS, La Ceiba. **In Italy:** Centro Linguistico Internazionale Sorrento Lingue, Sorrento. **In Spain:** Entorex, Madrid; Malaca Instituto, Malaga; Sociedad Hispano Mundial, Granada. **In Mexico:** Olé Spanish Language School, Queretaro; Spanish Language Institute, Cuernavaca; Universidad Internacional, Cuernavaca. **Worldwide:** Estudio Internacional Sampere; Home Language International; Study Group.

**Thank you to the following agencies for taking part in our survey:** Cultural Experiences Abroad, Cultural and Academic Travel Organisation (Cato), Inter'Es, International Connections Consulting, Language Link, Language Studies Abroad, NRCSA, School of Russian and Asian Studies.