

Young developments

Younger students, more groups and an emphasis on security and value for money all characterise the junior sector of the language travel market today. GILLIAN EVANS reports.



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The junior sector of the language travel market is a good source of business for many agents and language schools. However, as Anne Wittig of NRCSA agency in the USA points out, it is not an easy area in which to work. "Schools and facilitators need to have very strict rules and guidelines when working with this market, as there are a lot of benefits to this age group – but also much more serious repercussions if something goes wrong," she states.

Safety guidelines

Successful language schools involved in the junior sector must have foolproof procedures in place to ensure the safety of their juniors. "The safety of our children has always been our number-one priority," confirms Dolores Peleteiro, Academic Director of Chester College International School in Santiago de Compostela, Spain, which runs Spanish and English language summer camps for juniors as well as offering bilingual Spanish/English education to high school level. "Junior students are supervised by a member of staff at all times."

Constant supervision is vital for the wellbeing of the students as well as for assuring parents at home that their children are safe. And schools working in the junior sector have to be sensitive to parental demand. "We extended the supervision in both [our junior] course types and included the weekend excursion to Vienna as a fixed part of the course programme as parents asked us for more round-the-clock supervision," reports Martina Busse, General Manager at Austrian school, Deutsch in Graz.

National codes of practice concerning the welfare of juniors have also been introduced in some countries, notably in New Zealand. "All institutions who want to enrol younger students and groups must apply for special approval from the Ministry of Education through the Code of Practice for Pastoral Care of International Students," explains Kurt Schmidli, Marketing Director of New Horizon College of English in Napier, New Zealand. Rachel Senior from Lakes District Language School in Queenstown adds, "The code of practice in New Zealand is very strict so ensures maximum protection [for] juniors."

Young get younger

These codes of practice and guidelines are even more pertinent in the junior market of today as there is a general trend towards students travelling overseas to learn a language at a younger age. "The age group [of juniors] seems to be getting progressively younger and we have had enquiries for children as young as six," reports Schmidli

in New Zealand. EC English in Brighton, UK, has launched a new programme this year for eight-to-13-year-olds, which, says Sue Camilleri at the school, is "to meet the increasing demand for placements for younger and younger students".

Linked to the falling average age of juniors is the trend towards group travel. "For very young students, there is a growing demand for closed groups as several children can travel together with an adult, which is less worrying for some parents than one single child travelling alone," says Peleteiro. John Dimech at the Institute of English Language Studies (IELS) in Sliema, Malta, confirms the move towards group courses in the Maltese market. "We are seeing an

increase in groups of young students, not only in summer but also in the off-peak [period]," he says.

Another market development linked to the younger age of juniors is the emergence of parent and child courses, an area that Schmidli believes to be a growth niche within the junior market. Wittig confirms this trend but claims that there is a lack of such provision for her clients. "Courses where parents and children can study together are very popular in Spanish, Italian and French-speaking countries – and more quality programmes of this type are needed – especially for supervised children's programmes (age 0-12) in addition to teen courses (13-17) in the same location as adult programmes to facilitate family study," she says.

Shifting trends

Despite the potential of the youth sector of the market, the paperwork involved in running language courses for juniors in some countries, such as the UK, has meant that many schools concentrate instead on other target audiences. "Fewer and fewer schools want to get embroiled in the red tape regarding this age range which leaves more business for those schools who wish to continue," says Camilleri.

In other markets, competition among schools for junior clients is intense. Dimech explains, "Twenty-five per cent of our total student population was 16 years of age and under in 2003, and our numbers for this sector have been decreasing over the past few years mainly because of the competition from other local schools."

There is also a shift in destination choice occurring. Usually, destinations close to the child's home country are most popular, but recently there has been a gradual but perceptible change. Senior in New Zealand reports that they are now attracting some European juniors as "people are looking for somewhere different to the UK which they have been to on maybe a few occasions". Tanja Imhoff, Marketing Manager at Hawthorn-Vancouver (Canada Language Centre) in Canada, reports a similar trend in Canada. "We have seen new markets opening up in Europe," she says. "European students are venturing a bit further than just the UK. Students who have already been to the UK want to experience something different and Canada provides a safe alternative."

There is also competition in the junior sector from newer destinations, such as South Africa. "Cape Town is a relatively new destination and is only now starting to attract the teenager market," reports Gavin Eyre at Cape Communication Centre in South Africa. "Our groups would account for about five per cent of our yearly business at present and [this sector] is increasing nicely."

Outside influences

Despite the encouraging growth potential of the junior market, it is a particularly precarious business sector. Terrorist attacks, conflicts and any other security issues generally affect juniors more than other age groups. "Junior programmes are the most susceptible to world events," confirms Imhoff.

Not surprisingly, the past few years have hit the US junior market hard. "The number of youth in our programmes decreased noticeably in the summer of 2002, following the [terrorist] events of September 11, 2001," recounts Sheila Hoffman-Hicks at the Global Language Institute in the USA. "We believe that parents were particularly hesitant to send their younger children to the US at that time out of fear of further terrorism or retaliatory acts."

The growth pattern in the junior sector in 2004 has been patchy, depending on the students' country of origin, with adverse economic

conditions in some provider countries curtailing growth. "Factors affecting the market in 2004 [include] the economy of the client countries," confirms Alexander Musset, Marketing Officer at Burlington School in London, UK. Meanwhile, the New Zealand market is battling against its own strong currency. "[The junior market] has not recovered this year, the high New Zealand dollar, higher airfares and the increasing difficulty in airport procedures are factors," relates Senior.

However, agent Adriana Cantu at Cursos de Idiomas en el Exterior in Argentina says that their economic decline actually benefited the language travel market as parents are now careful to spend their money in a more useful way. "In Argentina it was usual to send children abroad for their 15th birthday, especially to Disney. After the economic crisis, the cost of travelling to other countries is significant and the choice in general is an English course combined with a cultural experience," she explains.

Costs count

Owing to the economic pressures in many provider countries, increasing price sensitivity is, unsurprisingly, a feature of the sector. "[The junior market] is very much influenced by the parents' decisions," says Manya Bredell at the Cape Town School of English in South Africa. "Costs are a big concern," Hoffman-Hicks agrees. "Agents, schools and parents seem to be looking for the lowest quote more than ever before. In the past they've, of course, always wanted a very good quote, but they were open to the balance of price and quality. Recently, economic difficulties have led a number of agents to request programming with fewer or less costly activities in order to obtain an even lower quote," she says.

To address this issue, the Institute of English Language Studies in Malta tweaked and trimmed down its junior programme, making it into a leaner value-for-money product. "[We] improved the activity programme and increased the number of students per class from 10 to 12, as this would not affect young students negatively. At the same time, [we] reduced the prices proportionately," says Dimech.

What is key in this market is satisfying the ever-changing consumer demands. That means not only focusing on the student's needs but on their parents' expectations too. "I think parents will get more selective in what they request and the 'bog standard' course will not sell so well," says Camilleri. "It will have to be a course with something special to survive into the future."

Nationality trends

For European language schools, Western Europeans have traditionally been dominant on junior language programmes and this is still the case with some schools. For example, Instituto Cervantes in Spain attracts mainly German and British juniors. However, more recently Russia and other former Eastern bloc countries have been increasingly sending young students on language courses in Europe. Andrea Linecker at IFK in Austria reports that their junior courses are most popular with "students from old and new European Union countries", and Marinta Busse at fellow Austrian school, Deutsch in Graz, says they have experienced an influx of juniors from Croatia, Slovakia and Slovenia in particular "as people become richer in these countries and can therefore invest more money in educating [their] children".

Other destinations have been experiencing an upsurge in junior numbers from Russia. "Malta has experienced an increase in the influx of junior students from Russia during the past few years," confirms Adrian Dalton of English Plus Language Centre in Malta, a trend that is echoed by Alexander Musset at Burlington School in the UK.

The adverse economic climate in many Latin American countries has meant a drying up of junior numbers from these countries although, as Sheila Hoffman-Hicks of the Global Language Institute in the USA reports, this shortfall has been made up by numbers from other countries. "Japan and Colombia currently provide highest enrolments. We have [also] welcomed more students from Turkey and the Middle East, largely due to relationships that have been developed over time," she says.