

THE ICEF JAPAN WORKSHOP

Meet quality student recruiters
from all over Japan

Keio Plaza Hotel, Tokyo
March 04 - 06, 2007

Japan's largest and most international agents workshop:
247 participants from 167 organisations and 20 countries in 2006

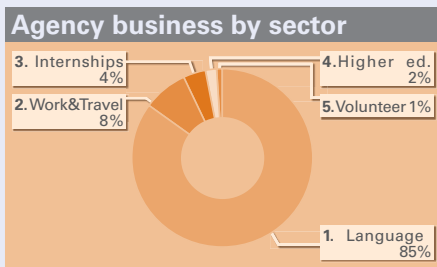
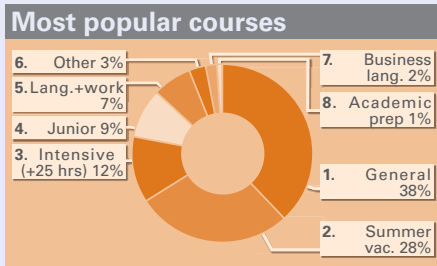
- Meet with a wide range of quality international student recruitment professionals
- Select and appoint new partners, maintain existing contacts, stay ahead of market trends
- Promote your brand and name recognition within the international education industry

www.icef.com



Italy changes gear

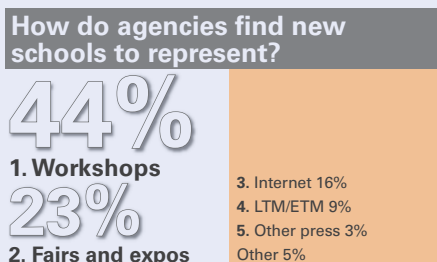
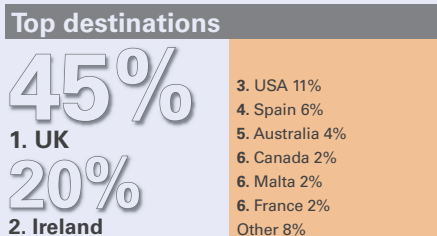
After slow momentum in the Italian marketplace, the last business year has been more dynamic, with agencies pointing to a more diverse portfolio and a stronger economy as factors that helped build business.



Economic overview

- Italian business confidence rose unexpectedly for the first time in three months in September 2006 as exports increased and declining oil prices cut manufacturing costs. Companies are reported to be optimistic about general prospects for the economy in 2007.
- Italy's economy expanded in the first half of 2006 after stagnation in 2005. However, the government is raising taxes and introducing spending cuts in an effort to tame the budget deficit. Italy's debt rose last year for the first time in a decade.
- Italy's GDP growth is expected to slow slightly in 2007 at 1.4%, down on the estimated 1.7% growth achieved in 2006.

Source: Bloomberg; Forbes.



Market growth

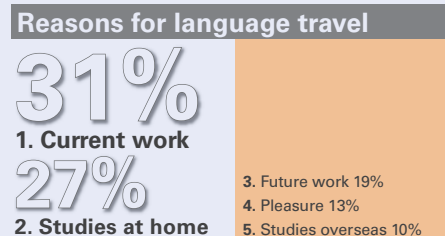
"The market is moving again," said one agency in our survey of Italian businesses this year, summing up what seems to be the case for many companies in this well-established outbound market. After slow growth previously noted in autumn 2005 (see *Language Travel Magazine*, September 2005, pages 14-15), the Italian market has picked up and overall average growth was recorded at 24.3 per cent, or barring one very high figure of 130 per cent growth, 16.8 per cent. This is a much improved result on the 2.7 per cent growth recorded in our previous survey.

Language and destination trends

The UK remains the most popular destination among Italian agency clients but its market share has dropped slightly from 55 per cent to 45 per cent. Ireland has gained somewhat as a result, increasing its share by three per cent to 20 per cent, while the USA remains the third most popular destination. After English, which accounts for 87 per cent of all courses requested, the second-most requested language is Spanish, at eight per cent, followed by French. In terms of overall business, many agencies only dealt in language learning overseas, while of those who did work in multi-sectors, Work & Travel was the next biggest business sector. At only eight per cent, it is a small but growing market segment, say agencies.

Student and course trends

The market in Italy is not really led by academically motivated students, and as a result, most students were considered to be studying overseas for current or future work purposes and 13 per cent of students are



Key points

- The total number of students placed by the 15 agencies in our survey was **7,498**
- Agencies placed between **9 and 2,000** students per year
- Average business growth was **24.3 per cent, or 16.8 per cent** barring one 130 per cent result
- The average length of stay was **2.8 weeks**
- Language tuition overseas** was the predominant business sector among agencies
- General programmes** and **summer vacation courses** accounted for two-thirds of all bookings
- Two-thirds** of those agencies canvassed charged a handling fee to clients
- In the last 12 months, agencies had worked with an average of **36 education institutions** each

said to study overseas for pleasure only. The most requested course types were general, summer vacation, intensive and junior programmes. The average length of stay is short, at 2.8 weeks, down slightly on the 3.4 weeks estimated in our previous survey. Forty-five per cent of students requested host family accommodation and a larger 47 per cent opted for residential accommodation; an interesting change on our last survey, when host family accommodation was favourite.

Agency business

Word-of-mouth recommendation and the Internet remained the two most important ways of agencies finding new clients, while workshops remained the most popular avenue for finding new school partners to work with. Agencies worked, on average, with 55 school partners, of which they had sent clients to 36 in the last 12 months. The breadth of business partnerships in the Italian marketplace is not as wide as in other countries, where agencies typically work with more schools on an annual basis. However, some of those businesses surveyed only sent clients to one or two study destinations.

Looking ahead

The outlook is positive, with many agencies expecting a good year in 2007. Some agencies point to increased marketing and participation at student fairs as helping to increase enrolments; others to external factors such as economic and political stability improving and terrorism concerns diminishing. One agency highlights Malta as a new destination for their agency, which is winning new clients.

Quality English

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
- Hampstead School of English, London
- Lake School of English, Oxford
- London School of English, London
- Melton College, York
- Wimbledon School of English, London

Ireland

- 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
- Modus Language Institute, Vancouver
- Vancouver English Centre

South Africa

- Interlink School of Languages, Cape Town

Poland

- York School, Krakow

Bosnia

- Soros School, Sarajevo

Agents can be sure of

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

Become a QE agent
agents@quality-english.com



www.quality-english.com

Percentage of agents who recognised each of the following organisations

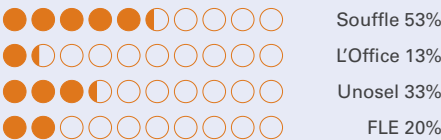
Australia



Canada



France



Ireland



Italy



Malta



New Zealand



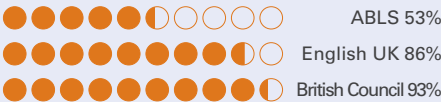
Portugal



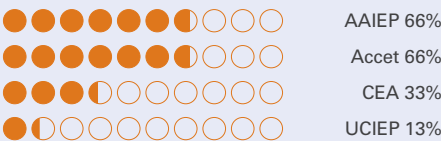
Spain



UK



USA



International



Europe



Italian agents named a range of language programmes they work with, including: **in Australia:** Travellers Contact Point, Sydney, NSW; University of New South Wales, Sydney, NSW; **in Ireland:** ATC Language & Leisure, Dublin; Atlantic Language, Galway, CES, Dublin; Home School of English, Dublin; IH Dublin, Dublin; Language Centre of Ireland, Dublin; Limerick Language Centre, Limerick; Morehampton Language Institute, Dublin; Pace Language Institute, Bray. **in Malta:** ESE, Gzira. **in Spain:** Colegio Delibes, Salamanca. **in the UK:** Basi Paterson, Edinburgh; British Study Centre, London; Central School of English, London; EAC, Edinburgh; ELG, Bristol; Frances King School of English, London; Oxford English Centre, Oxford; Hampstead School of English, London; IH-Welsh Group, various; IH Newcastle, Newcastle; Live Language, Glasgow; London House School of English, Westgate-on-Sea; Parkland International, Reading; Pilgrims, Canterbury; Starford House, Canterbury; Severnside Academy, Shrewsbury; St Michael's, Tenbury; Victoria School of English, London. **In the USA:** Academic Adventures in America, Summit, NJ; University of California San Diego, San Diego, CA; UCLA, Los Angeles, CA. **Worldwide:** Sprachcaffe, St Giles; Study Group.

Thank you to the following agencies for taking part in our survey: Accademia Britannica IH, Across the World, Ageo Väggi, ALCE, ALP, Corsi di Inglese, Auriga Servizi, Coming, I Centri, Indirizzo Inghilterra, International Know How, MB Scambi Culturali, Prolingue, STI Travels, Today International, WEP.