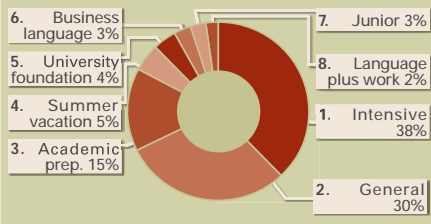


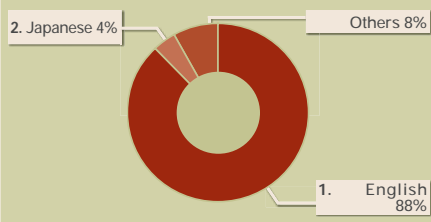
Korea on a roll

Despite a slight slowdown in Korea's economy, the language travel market performed well in 2006 while the range of language travel destinations favoured by Koreans increased. Meanwhile, clients are utilising agency websites more and more.

Most popular courses



Top languages



Economic overview

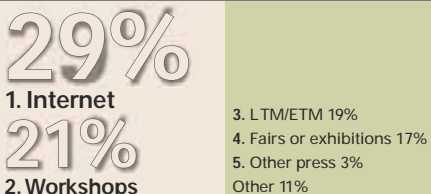
- South Korea's GDP, which grew by five per cent in 2006, increased at its fastest rate in four years. Exports grew by 13 per cent in 2006, compared with 9.7 per cent in 2005, and private consumption was up from 3.2 per cent in 2005 to 4.2 per cent in 2006.
- Korea's economy increased by only four per cent in the fourth quarter for 2006, the slowest growth rate for 18 months, largely because of a slowdown in consumer spending.
- In the first quarter of 2007, South Korea's economy grew by 0.9 per cent, although economists forecast its economic growth will accelerate in the second half of 2007.

Source: Bloomberg.com

Top destinations



How do agencies find new schools to represent?



Market growth

The Korean language travel market continued on its growth curve in 2006 with nine of the 13 agencies that took part in this issue's survey reporting an increase in business of between eight and 69 per cent last year. A further two agencies experienced a stagnation in student numbers, while another two experienced slight decreases of 0.3 per cent and 10 per cent. The slump in business was put down to the slowing economy and the intense competition in the agency market. Nevertheless, across all agencies' business, the market grew by 19.3 per cent in 2006.

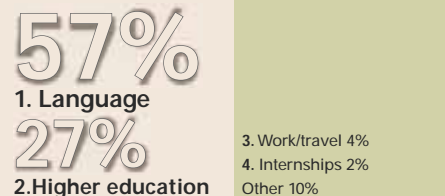
Language and destination trends

One agent noted that there was an ironing out of market share among the various English-speaking destinations. He related that demand for the USA had dropped in recent years, while other English-speaking destinations such as Ireland, Malta and the Philippines were gaining ground. The USA's share was down by five percentage points on 2005's figures to 34 per cent in 2006 (see *Language Travel Magazine*, August 2006, pages 18-19), while Ireland's slice of the market had increased from three to eight per cent. The UK, Canada, the Philippines and Australia were all down three percentage points on last year. In terms of language preference, English accounted for 90 per cent of requests, while Japanese was in second place with four per cent. This was followed, at some distance, by Spanish, Chinese and Italian, each accounting for less than one per cent of the total market.

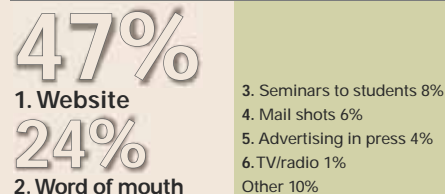
Student and course trends

Over 40 per cent of Korean students take a language programme for their further

Type of courses



How do agencies recruit students?



Key points

- The total number of students placed by the 13 agencies in our survey was **14,954**
- Individual agencies placed between **five** and **8,646** students on courses each year
- Average business growth was **19.5 per cent**
- The average length of stay for Korean students was **19.5 weeks**
- Overall, **55 per cent** of Korean students stayed with host families when studying overseas
- **Over 40 per cent** of Korean students take a language course for their further studies overseas
- In the last 12 months, agencies worked with an average of **119 providers** each

studies overseas, while the second-most common reason is for future work. Despite the academic goals of a large proportion of agency clients, only 15 per cent take academic preparation programmes and a further four per cent a university foundation course. Intensive programmes of over 25 hours of tuition per week were the biggest sellers in the Korean market, accounting for 38 per cent of bookings compared with 32 per cent last year, followed by general language courses with 30 per cent, down from 36 per cent previously.

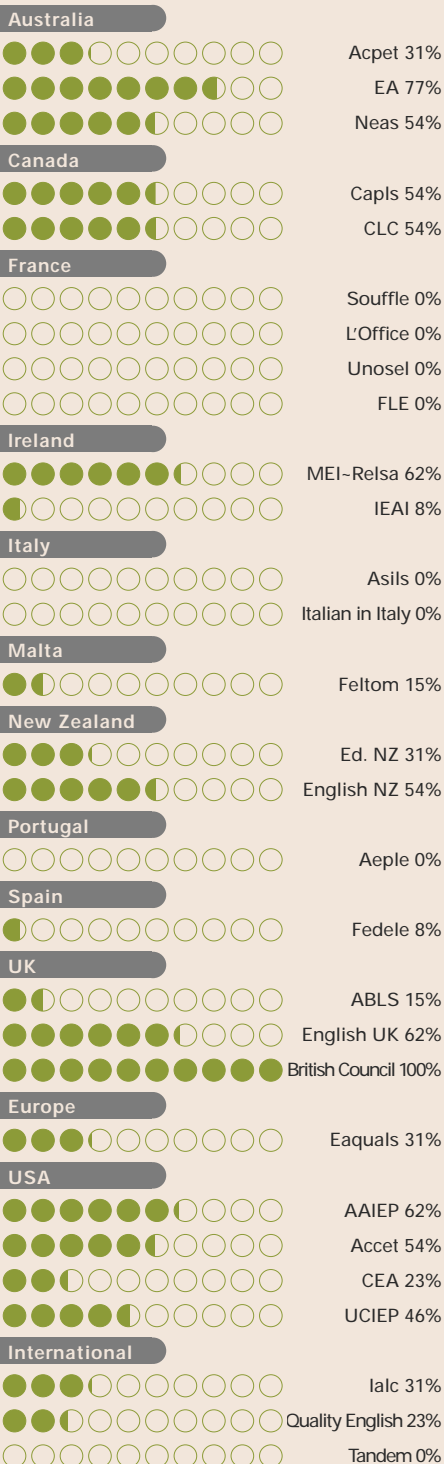
Agency business

Language course bookings accounted for just under 57 per cent of agency business, while a further 27 per cent was counselling for higher education places overseas. In terms of client recruitment, the Internet has become the most important tool, accounting for around 47 per cent of clients compared with only 26 per cent last year. Word-of-mouth recommendations remain important, contributing around 24 per cent of clients, but this was down from 39 per cent last year. The Internet has also increased its importance as a means of finding new business partners with 29 per cent found using this resource, compared with 25 per cent last year.

Looking ahead

Despite the slowdown in the Korean economy, all but one agent forecast continued business growth in 2007. One mentioned that they expected their web advertising campaign to push up sales while another agency, which previously only offered courses in the UK, has expanded its portfolio to include Ireland and Australia in a bid to win more clients.

Percentage of agents who recognised each of the following organisations



Korean agents named a range of programmes they work with, including: in Australia: Embassy CES, various; in Australia: Confederation College, Thunder Bay, ONT; English Language Training College, Edmonton, AB; International Language School of Canada, Vancouver, BC; Pacific Gateway International College, Vancouver, BC; Pacific Language Institute, various; in Germany: Birkhof School, Hinterzarten, CDC, various; in Ireland: CES, Dublin; Emerald Cultural Institute, Dublin; International Study Centre, Dublin; Language Centre of Ireland, Dublin; in New Zealand: Christchurch College of English, Christchurch; in the Philippines: Lipa City Colleges, Lipa City; in the UK: CES, Swandean School of English, Worthing; Henley College, Coventry; St Giles, London; Sussex Downs College, Lewes; in the USA: English Language Institute, University of Delaware, Newark, DE; ELS, various; Lakeland College, Sheboygan, WI; Saginaw Valley State University, University Center, MI; Towson University, Towson, MD; University of Findlay, Findlay, OH; International: Aspect, EF, Eurocentres, Kaplan. Thank you to the following agencies for taking part in our survey: IAE Edu Net, Inestia Overseas Study, ISEP, KAMC, Onlineyuhak, Paran Education, People Loving Education, Top Educational Counselling House, Uihak.com, Uihakfocus.

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