

# Italy's view

The September 11 events in the USA last year caused US student numbers to all but dry up for Italy, although the launch of the euro this year has brought with it new interest for Italian language tuition from other European Union member states. GILLIAN EVANS reports.

A year of modest growth would perhaps best describe 2001 for Italian language schools in Italy. While some schools recorded growth rates of up to 25 per cent, Sonia Di Centa of Centro Internazionale Dante Alighieri in Siena reports a common experience among schools. "We have had slow steady growth of five per cent for each year [since 2000]," she says.

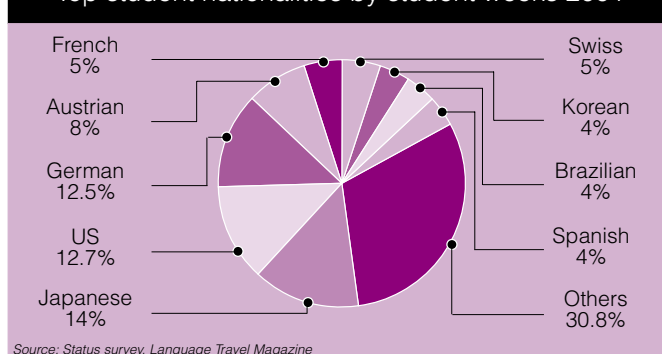
One of the main reasons for the stagnation of the Italian market is the number of new language schools that have established themselves in the country over the past few years, all eager to win market share from the established players. One such school is Omnilingua in San Remo, which since its launch in April 1999 has experienced annual growth in student numbers of between 25 and 75 per cent. This year, Daniel Pietzner at the school forecasts an increase of at least 15 per cent in student numbers.

However, while newer schools still rely on the traditional Western European markets, particularly Germany, Austria and Switzerland, other providers are increasingly attracting students from other world regions. Brunella Belluomini, of Scuola Toscana in Viareggio, reports that her school still attracts a large proportion of Europeans and Americans but she adds, "We now have Brazilian and Japanese students too." At Il Centro Italiano in Milan, the top student nationalities are Japanese and Korean.

Silvia Agati Renato, Director of Studies at Ciao Italia in Rome, says they have been attracting an increasing number of northern European students, which she puts down to the growing importance of European languages within the European Union, since the introduction of the euro. But this has been offset by lower num-



Top student nationalities by student weeks 2001



Source: Status survey, Language Travel Magazine

bers from other regions. "Since the entry of the single currency in Europe, we have received more enquiries from European nationalities whereas other nationalities, such as South Americans and Asians, are still facing difficulties in obtaining visas," she explains.

Luisa Turolla, of Il Centro Italiano, blames the difficulty in getting visas and the events of September 11 (see right) for the 30 per cent drop in student numbers experienced at the beginning of 2002, in comparison with the same period last year. Nevertheless, she adds, "We have noticed a significant increase in the number of students from countries such as Russia, Poland and Yugoslavia, and from China."

The average length of stay for Italy is quite low, according to the Status survey conducted by Language Travel Magazine, with most language schools reporting that the majority of students enrol

on courses of just two or three weeks in duration (see Language Travel Magazine, April 2002, page 48). Di Centa reports that they are receiving more and more requests for one-week courses, but at the same time, she says, "We have noticed an increase [in the average length of stay]. The average went from 4.9 weeks in 2000 to 5.4 weeks in 2001."

In terms of marketing, around 27 per cent of students in Italy were recruited through agents in 2001, according to the Status survey, while a further 28 per cent enrolled via the schools' websites. It is in this latter area that a number of schools are concentrating their marketing efforts. "We do use overseas agencies, mainly in Germany, Belgium, the United States and England," reports Agati Renato, but she adds, "about 70 per cent of our bookings are from Internet contacts and this trend is set to improve".

## September 11 impacts on the Italian market

With US students making up the second-largest nationality for Italian language schools in 2001, according to the Status survey by Language Travel Magazine, many Italian schools suffered a huge drop in student numbers from the USA as a consequence of the September 11 attacks.

"We were very affected [by September 11] as the USA is a big reservoir of potential students [for us]," explains Sonia Di Centa of Centro Internazionale Dante Alighieri in Siena. "After [September 11], we mainly received cancellations."

Daniel Pietzner at Omnilingua in San Remo agrees that his school received fewer enrolments from the USA and he adds that students enquiring about courses wanted more "enrolment details such as cancellation [refund] guarantees".

At Ciao Italia in Rome, Silvia Agati Renato reports, "We have [also] noticed a decrease in enrolments from Middle East and Arab nationalities."

Although student numbers at language school, I Malatesta, in Rimini were unaffected by the September 11 attacks, the school's Director, Bruno Fabbri, reports that the Italian visa issuance procedures were tightened. "[The attacks in the USA] had a negative effect on various embassies in general," he says. "Many students couldn't get a visa or got them only after months."

While visa issuance still remains a lengthy process for some nationalities, it is late bookings that have become a clear characteristic of the language teaching market in Italy this year. "We are receiving many enquiries, although at the moment we do not have many confirmations," says Brunella Belluomini of Scuola Toscana in Viareggio. She adds that she hopes they will start coming soon.