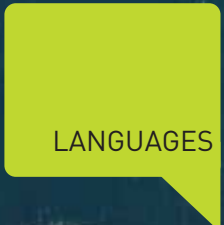




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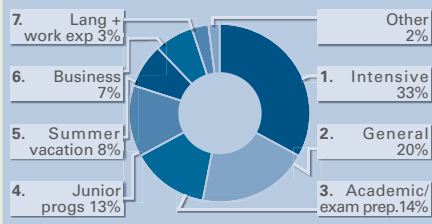


Amith Palibik

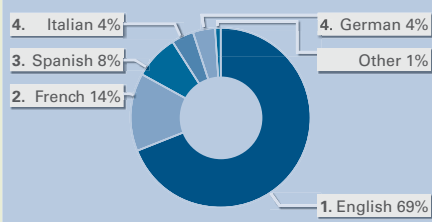
# Swiss hopes

The outbound student market in Switzerland experienced improved fortunes in 2005, according to 12 education travel agencies, with the needs of business fuelling increasing interest in language learning programmes.

## Most popular courses



## Top languages

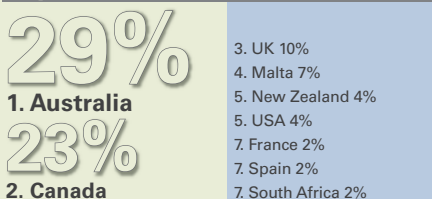


## Economic overview

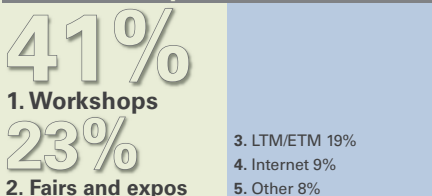
- Economic growth in Switzerland improved during the second half of 2005, driven mainly by the export sector. Real GDP in the third quarter was up 4.3% on the previous period, while the number of employed persons increased slightly.
- Merchandise exports in 2005 totalled US\$121.5 billion in 2005, while merchandise imports were US\$114.9 billion, resulting in a trade surplus of US\$6.6 billion.
- Economic growth is expected to continue throughout 2006 with the Swiss National Bank predicting a 2% growth in real GDP year on year. Exports are likely to increase due to a robust global economy.

Source: Swiss National Bank, The Economist

## Top destinations



## How do agencies find new schools to represent?



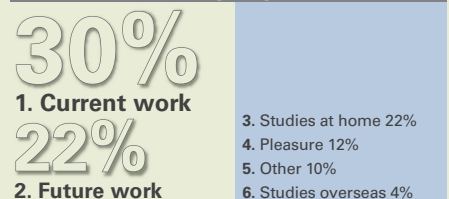
## Market growth

Most of the agencies taking part in this year's Agency Survey on Switzerland reported business growth in 2005, although two said that they had experienced declines of seven per cent and 25 per cent respectively. Percentage increases ranged from one to 30 per cent among the rest of our 12 respondents, while the overall change in business was growth of five per cent. When we last looked at the Swiss market, just seven of nine agencies reported an increase in business, although the overall growth was larger at eight per cent (see *Language Travel Magazine*, August 2004, page 14-15). Agents highlighted better economic conditions as having a positive effect on their business last year, while one of the agencies that experienced a decline in bookings in 2005 said that this was due to strong competition.

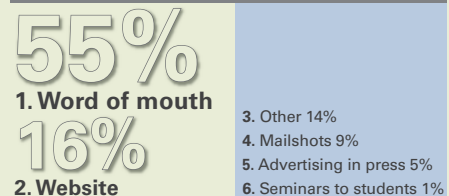
## Language and destination trends

Languages other than English were requested by a greater proportion of students this year, according to our agents, with English asked for by 69 per cent of clients, compared with 77 per cent in 2003. French was the most popular language after English, chosen by 15 per cent of clients (up from nine per cent previously), followed by Spanish (eight per cent – down from nine per cent), Italian (four per cent – up from three per cent) and German (four per cent). The UK's popularity as a study destination has also decreased since our last survey, attracting just 10 per cent of students, compared with 25 per cent previously. Instead Malta has emerged as a more popular destination, while Australia and Canada remained the most popular countries for students wanting to learn English.

## Reasons for language travel



## How do agencies recruit students?



## Key points

- The total number of students placed by the 12 agencies in our survey was **3,120**
- Individual agencies placed between **35 and 2,000** students on courses per year
- Average business growth was **5.2** per cent in 2005
- The average length of stay for Swiss students was **6.9 weeks**
- Overall, **79 per cent** of Swiss students stayed in host family accommodation when studying overseas
- Ten** agencies charged clients a handling fee of between CHF40 (US\$31) and CHF75 (\$60)
- On average, agencies worked with **66 schools** in **18 countries**

## Student and course trends

Language skills are becoming an increasingly common requirement within the workplace and a large proportion (30 per cent) of agency clients indicated that they were learning a language for their current job. This is in contrast to the findings of our previous survey when a greater percentage (44 per cent) were said to be learning a language largely to help their current studies at home. In our current survey, just 22 per cent of students had current studies as the motivation behind their language travel trip. Correspondingly, business courses were a more popular course choice, making up seven per cent of placements compared with three per cent previously, while academic-focused language courses decreased in popularity from 24 per cent in 2003 to 14 per cent in 2005.

## Agency business

Most students found their agency by word-of-mouth recommendation and this proportion increased slightly from 47 per cent to 55 per cent. Agent respondents said that 41 per cent of their new school contacts were made at workshops, up from 32 per cent previously. An increasing number of contacts were also made through *Language Travel Magazine* and *Education Travel Magazine* last year (19 per cent compared with six per cent in 2003).

## Looking ahead

Most agents who expressed an opinion predicted business would grow in the future, in line with an improving economy. Some agencies also described initiatives that they were planning, which included overhauling a website and increasing a range of programmes in Australia and New Zealand.

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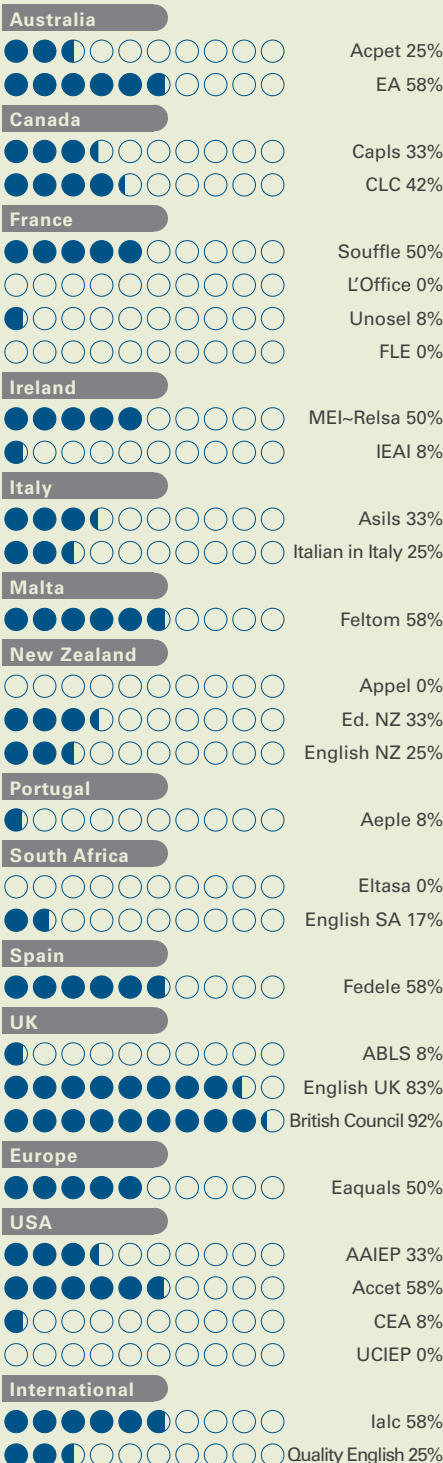
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**Percentage of agents who recognised each of the following organisations**



**Swiss agents named a range of language programmes they work with, including, in Australia:** Australian College of English, various; Geos Australia, Perth, WA; International House, various; Milner College, Perth, WA; Phoenix Language Academy, Perth, WA; St Mary's, Perth, WA; University of the Sunshine Coast, Maroochydore, QLD; **In Canada:** Canadian College of English Language, Vancouver, BC; Global Village, various; International Language Academy of Canada, Vancouver, BC; Language Studies International, Vancouver, BC; Pacific Language Institute, Vancouver, BC; **In France:** Institut Linguistique Adenet, Montpeller; **In Germany:** International House, Freiburg; **In Malta:** Easy School of Languages, Valletta; European Centre, St Julians; **In New Zealand:** Crown English Language Academy, Auckland; **In the UK:** Anglo-Continental, Bournemouth; Regent Language Training, various; **In the USA:** Embassy CES, various; Florida Language School International, Pasadena, CA. **Worldwide:** CCI, St Giles International.

**Thank you to the following agencies for taking part in this survey:** AD Voyages Langues et Cultures, Akzent Sprachbildung, Australia Europe Connection, Canada Live, Follow Me Schülersprachkurse, Globo Study Sprachreisen, Lingua Service, Linguista Sprachaufenthalte, Live & Study, Sniggie Rider Schoenenberger, STA Travel, STS Student-Travel Schools.