

# fruits of



Although the northern hemisphere's summer is the busiest time of year for many language teaching destinations around the world, student demand has been putting pressure on summer language providers. Late bookings, price sensitivity, higher student expectations and shorter lengths of stay are all making life difficult for providers. However, student numbers for many have been rising. JANE VERNON SMITH reports.

# summer

The northern hemisphere summer months of July to September represent an annual peak in business for most language schools. Even on the other side of the globe in Australia, schools report an increase in business during this period. However, signs of resistance have been noted, and the late bookings that characterised the 1998 season were, if anything, even more evident in 1999.

*"Students do not want to book [their summer language travel courses] until the last moment to see if they can get a better offer, or just in case they change their mind"*

"Late bookings were a total nightmare," laments Richard Young of Camp Beaumont in the UK. "It's getting later and later. Parents are waiting for their kids' exam results. The Germans still book early, but they're getting later too!"

Although late booking may well act against the interests of the student – forcing schools at the last minute to arrange extra teaching staff, facilities and accommodation – this in itself is unlikely to put an

end to the practice. One of the major factors felt to be responsible is economic uncertainty. Thus, the bookings that do finally materialise could be seen as a plus. Theresa Meyer, Coordinator of International Language Programmes at Malaspina University-College in Canada, views late booking in this way, attributing it "to the sudden improvement in economic situation and the realisation that people [can] afford to travel [and] participate in an overseas experience".

Delays in obtaining visas, where needed, can also contribute to late bookings. So, too, can other unavoidable external factors. Italy's Rimini Academy, for example, received a spate of late bookings last summer, following the end of the Balkan war. According to Spokesperson at the school, Maria Grazia Foschi, "the nearness of the coast to the focus of fighting or the presence of military forces on Italian territory" may have been the reason why these bookings did not materialise earlier.

However, at The Language Academy in the USA, Chairperson Marco Pinna believes that agents carry some responsibility for the scale of the problem. The school itself has encouraged early reservations for summer 2000 courses by offering additional discounts to agents and by pegging prices at their 1999 level for early bookings. Yet, he claims, "Based on our experi-

*“One area where a shift appears to be taking place is in the number of young learners, aged from nine to 14. Schools in the UK, Ireland and Malta have all remarked on this trend”*

ence, agents do not encourage early bookings by offering discounts, bonuses or incentives.”

At the same time, language schools and agents have noted that clients are becoming increasingly sophisticated in their approach to booking summer courses. Angel Juanpere of the Spanish agency Easy notes that “students do not want to book until the last moment to see if they can get a better offer, or just in case they change their mind”.

strategy” during August 1999 in order to maintain the flow of students from Eastern Europe, in response to the Russian crisis in particular.

While the lower end of the market was exposed to price sensitivity, the upper end too saw clients demanding more for their money. At the UK-based Frances King Summer Centres, Director Jane Merrick says that clients are demanding ever-higher standards, such as accommodation including en suite facilities.

Basically, however, course demand appears to vary very little from summer to summer, with schools and agents alike confirming that basic standard language tuition plus activities remains the most popular

## View from Ireland/Malta

Two popular summer destinations for English language students are Ireland and Malta. We spoke to Jacqueline Joyce of Ireland’s MEI-Relsa and Louis Grech of Feltom in Malta to see how their 1999 summer seasons compared.

In Malta, says Grech, the majority of Feltom members reported an “average-to-good” summer in 1999. Numbers were marginally up on 1998, thanks to both greater marketing efforts, and Malta being “discovered” as an English

language teaching destination by new markets. Although most schools reported an “interesting” increase in students coming from Eastern Europe, Grech continues, the majority of summer business still comes from Germany, Italy, Austria and France. However, for Malta, the summer period by no means represents the whole picture. “Malta is definitely moving away from the ‘fun in the sun’ idea, and becoming a serious year-round language stay destination,” asserts Grech.

Ireland, meanwhile, is a much more seasonal market. “Although we felt certain that the Irish industry could not cater for any more students in July, our summer numbers evidenced an increase all around,” says Joyce. “It is true to say that the summer season for the Irish schools now goes from late June to mid-September.

This, she explains, is due in part to changes in the Italian education system, which allow business to stretch out over the whole period between June and

September. Another important factor last year was the weakness of the euro against sterling, which meant that Irish schools were able to offer value-added courses.

“If anything, the euro has meant a strengthening of our core European Union business, even though we made strenuous efforts to attract more of a nationality mix,” explains Joyce. “We did attract good Russian, Austrian, Czech, Brazilian and even Korean junior business. We are hopeful

that with the euro weakness against the dollar, all these markets will find it easier to ‘buy Irish’ next season.”

In the meantime, the majority of the larger operators in Ireland have now stopped taking bookings for July and August from Italy and Spain. “We have always maintained that we are not a mass educational tourism destination,” says Joyce. “Even though we are significantly cheaper than our nearest competitors, that is not a reason to undersell.”

Most are agreed that clients are attempting to drive a harder bargain. According to Pinna, “students and agents have become increasingly sensitive to prices due to the dramatic booming of [English as a second language] programme offerings.”

“‘Every cent counts’ is the attitude being shown,” agrees Keith Zammit, Director of Malta’s European School of English.

As a result, some schools, like Club Langues et Civilisations in Spain and Rimini Academy in Italy, have maintained prices at last year’s level. Meanwhile, Camp Beaumont operated a “competitive pricing

type of programme. One area where a shift appears to be taking place is in the number of young learners, aged from nine to 14. Schools in the UK, Ireland and Malta have all remarked on this trend, which Merrick for one believes will continue into 2000.

Host family accommodation has always been a popular choice for younger students, and, based on an expected rise in their numbers, this demand is not likely to disappear. As Russian agent Nina Konogova, Head of the international studies department at BKC-International House points out, “the majority of Russian parents prefer their kids to stay in host fami-

lies with children of the same age". However, Jacqueline Joyce, Manager of Ireland's MEI-Relsa, and Louis Grech of the Maltese association, Felton, both report that schools are seeing an increase in demand for residential accommodation. According to Grech, "the school residence idea seems to be catching up in Malta". Meanwhile, Zammit has observed a growing interest in self-catering apartments. "Students seem to relish their independence and freedom more, with no timing ties or obligations."

If this trend continues, it may help ease the pressures on homestay accommodation, which many locations have experienced during recent summers. In

*"Other than profile-raising and special price deals, one way schools can lure the client is by offering something different in their summer programmes"*

Although the trends described above undoubtedly made life more difficult last year, many schools recorded healthy increases in student numbers for the 1999 summer season. For some, this was due to the return in large numbers of students from Asia. At Malaspina University-College, Meyer reports that the school enjoyed a 60 per cent increase in summer programme enrolment last year, which, with the majority of its students coming from Asia, she believes

## Summer centre or year-round school?

Among the many choices facing students selecting a summer language programme is the type of language school they want to attend. For Italian agent Domenico Imbesi of Imbesi Viaggi, his first-choice recommendation would be a year-round school, "because we feel the quality of teaching is much better."

For those who share Imbesi's concerns that summer centres may lack consistency of teaching quality, the schools themselves are keen to offer

reassurance. Jane Merrick, Director at Frances King Summer Centres in the UK, says, "Eighty-five per cent of our staff – mostly recruited from overseas schools that close during the summer – return every year. This creates stability." Of course, summer centres such as Frances King's also benefit from being part of a related year-round operation.

Many summer-only centres, such as Dublin-based Euro-Irish Summer Schools, have years of experience to call on.

"Because this next summer will be our 25th summer session," says Spokesperson Nadine Barber, "we know now what to do if we get 10 people or 100 for one session... We have a team of teachers who can start at the last minute."

For Imbesi, where summer centres can score over year-round schools is in their provision of residential accommodation. "Most of the year-round courses offer family accommodation and not too much residential [provision]," he notes. The

problem with this, he adds, is that the group market tends to want the opposite, and the final choice mainly depends on what kind of accommodation schools can offer.

In Russia, Nina Konogova of agency BKC-International House, believes that summer centres have a particular role to play. Benefits including residential accommodation and wide-ranging facilities, such as swimming pools and tennis courts, contribute to her conclusion. "I consider

summer-only centres much more appropriate for teenagers and young adult students because they also give students [the] opportunity to make friends with boys and girls from other countries."

In the final analysis, the decision must take into account not only the choice of accommodation offered, but, most importantly, the objective of the course - in other words, what is the desired ratio between holiday fun and serious language learning.

1998, Ireland's capital, Dublin, suffered from a severe shortage of host families. In 1999, this problem was counteracted by MEI-Relsa encouraging its member schools not to accept late bookings and to offer value-added products. "This meant they could attract and keep host families in spite of competition from unrecognised operators who do not pay tax in Ireland," says Joyce. Maltese schools were also forced to turn down bookings as a result of this problem, according to Grech. "Most schools," he reports, "are now trying to place students in less central areas where host families are more 'available'."

was due to the improvement in the Asian economic situation. Australia's Adelaide Institute also ranks Asian countries – including Japan, Hong Kong and Thailand – among its key markets, and, according to Darryl Earl, student numbers were up by over 50 per cent in the period between July and September, which is a much busier time for the school than the Australian summer months of November to February. Meanwhile, in Europe, the Goethe Institut's Klaus Steininger notes a 50 per cent increase in numbers from Korea, which contributed to an overall rise in students last year of just under two per cent.



came as a result of attendance at three workshops, as well as a “very aggressive” marketing campaign conducted in Europe.

Other than profile-raising and special price deals, one way schools can lure the client is by offering something different in their summer programmes. According to Merrick, the rising trend is for activity programmes that include professional sports training. This is already proving successful at Camp Beaumont, where Young notes an increase in demand for intensive football and tennis courses. New courses for 2000 are set to include “thrill seeker” and “trendsetter”, both of which feature a trip on the London Eye giant Ferris wheel.

When financial pressures are brought to bear, students have three choices: they can either abandon their plans for a language study programme, reduce their length of stay or opt for a cheaper destination and/or school.

Others gained their increases thanks to the successful tapping of “new” markets. Like many others, according to Spokesperson Patrick Bellegarde, the French Université d’Eté de Perpignan has benefited from the development of business from the Ukraine and Russia. In the UK, Camp Beaumont achieved an increase in student numbers in the region of 30 to 35

*“When financial pressures are brought to bear, students have three choices: they can either abandon their plans for a language study programme, reduce their length of stay or opt for a cheaper destination and/or school”*

While student numbers increased at many schools last year, there was also evidence that in some cases the length of stay was down. “Markets in crisis tend to do two weeks; those where there is more confidence tend

per cent compared with the previous summer. According to Young, this came partially as a result of bookings from countries such as Iceland, Morocco and Portugal, all of which, he notes, are growing markets with an interest in fun/active learning.

Of course, the success schools have in raising their numbers is dependent, to some degree, on the spread of markets they are able to tap into. As Young points out, the fact that Camp Beaumont is not dependent on just a few markets contributes to its ability to maintain buoyancy.

Because of the strength of the UK pound against the local currency, Spanish agent Juanpere notes that some students are currently looking to Ireland, Malta, New Zealand or Canada as alternatives to the UK. Meanwhile, at ActivA Intercâmbio Internacional in Brazil, Executive Director Marcos Londe identifies a shift from the USA and UK to Canada for four-week courses and to New Zealand for six-month courses. Again, this is a result of currency changes. In Japan, Kanami Ikeda of Alps International Exchange, has observed a shift towards the USA, Australia and New Zealand, although interestingly, he also comments that “nobody asks the price”.

With economic uncertainty affecting a number of key markets, what has made the difference for some schools is an increase in their marketing effort. According to Pinna, a 45 per cent increase in the number of international students at the Language Academy

to do three or four,” observes Young. This comment is borne out by Konogova, who says, “I have to admit... that [there] was some decrease in the number of tuition weeks. I think that after the [financial] crisis, Russian families could not afford... for them or their children to stay abroad longer.”

Currency fluctuations also affect this equation, and Merrick notes that, while the average length of stay at Frances King is currently three weeks, for

*“The outlook remains bright for well-run traditional summer language programmes”*

some markets, like France, it is down to two, and this is partly to do with the strength of the pound. “Students prefer two weeks’ quality tuition,” she suggests, “to three weeks of lower quality.”

Despite the various economic pressures on the market, the outlook remains bright for well-run traditional summer language programmes. “The summer market will remain the mainstay for language school providers – no question,” concludes Merrick.

As witnessed by markets such as Russia, Brazil, Japan and Korea, even in countries facing the greatest economic difficulties, there is a determination that young people should continue to benefit from some form of summer language learning experience. □