

The June to September period remains a peak business time for many language schools, but some characteristics of this summer season are changing. The range of student nationalities typically enrolling during these months is increasing, and as a result, there are more diverse courses on offer. GILLIAN EVANS assesses the evolution of the summer market and finds out some of the problems that high seasonal demand can bring.

July and August are the student honeypot months for many language travel agents and language schools, particularly those in the Northern Hemisphere. It is the most popular time for many language travellers to take a language course overseas, either because it coincides with their long school or university breaks or it is their traditional summer vacation time. And, although the trend towards language courses in preparation for academic studies overseas has produced more long-term language travellers year-round, the peak from June to September is certainly one of the market's permanent fixtures.

2002 summer season

Nevertheless, the experiences of language schools around the world in summer 2002 were rather mixed. For some schools, student numbers remained rather flat. The September 11 2001 attacks on the USA negatively affected the 2002 summer season in North America in particular. "Our numbers were down the first half of [2002]

probably because of September 11 – our inquiries dropped over 50 per cent," reports Roberta Feltrin Rodenhizer,

Co-Director of the Language Circle in Canada.

"Therefore, our students numbers were down in June and July, but started picking up in August and continued to do so in the fall."

However, Jamie Meikle, Marketing Manager of the Canadian College of Eng-

summer trends

lish Language in Canada says their numbers recovered more quickly and were up during the summer of 2002.

Last year's summer for Ireland West English Language Holidays in Ireland, was, according to its Director, Sheila McCrann, "the most disappointing since we began operating in 1989". She believes a mix of September 11, the euro and the downturn in the world economy may be to blame. Similarly, Udo Thaeter of Forum Deutsch in Germany, described summer 2002 as "worse than ever".

While some summer markets have undoubtedly felt the pinch of the cautiousness in the worldwide travel market and the ailing economies of some countries, schools such as Andalusí in Spain report healthy growth in their summer business. "In comparison to summer [2001], we have grown. We have been in the market for five years and each summer we have increased the number of students," says Carmen López at the school.

In France, Yvelines Langues only started its summer courses in 2001, and yet, student numbers from June to September already make up 30 per cent of their annual total. "The launch of our summer programme is recent. It is not our main season at the moment but it may be in the future," says Béatrice Duquennoy at the school.

Richard Day of English in Chester in the UK – where total student numbers in July and August account for 50 per cent of their annual enrolments – notes that their summer numbers have bounced

back to previous levels, before BSE/ mad cow disease

and then the foot and mouth epidemic caused students numbers to drop in the UK's summer months of 2001. For 2002, Day reports, "There were more individuals and group students from China/Hong Kong, and a growing number of young adults from the Czech Republic." He adds that the executive market was "quite strong" and there was good demand for teacher training courses.

Growth in the summer market for some providers has been fuelled by demand from closed groups, often school pupils accompanied by their teacher. "Our student enrolments increased during the months of June to September [in 2002] as we have groups that come and enrol either in our [English language] programme or our group programme which includes activities," reports Monika Benker, Manager of Four Corners Language Institute in Canada.

Nationalities

The main student nationalities during the summer season are, generally speaking, European, Japanese and more recently, Chinese. For Yvelines Langues in France, British and US students make up the largest two single nationalities during the summer months, while Lopez in Spain says their largest student nationality is French. Elaine

"Some host families are not able to guarantee a student single-room accommodation. This is quite difficult to accept for Spanish people."

Pedro de Diego Coppen, EBL Idiomas, Spain



Hill at Queensland College of English in Australia reports that Taiwanese, Chinese and Japanese students were the most important in the months from June to September at their school, but she adds that there were more students from Hong Kong in 2002.

There is increasing evidence of students choosing long-haul travel options for their summer programmes. Although Language Circle in Canada has students from Japan, Korea, Brazil and Europe, it has experienced growth from this latter nationality group during the summer. “We get more students from Europe in the summer months – probably because they have their summer vacations then and can travel,” says Feltrin Rodenhizer. Day confirms that many more European students are travelling further afield, particularly as the UK pound remains strong, making it relatively expensive to study there. “European students looking for a long course now find that [other] destinations can offer something attractive,” he says.

The top summer nationalities at English in Chester are Spanish, Italian, Swiss, German, Japanese and Chinese. “With the exception of China, these are the traditional markets that we have been working in for over 25 years,” says Day. Brian Brownlee, of Anglo European School of English in the UK, points out that the traditional European markets will always be important during the UK’s summer season. “There will always be far more people who can take time off for a course in July and August,” he says. “Italian and Spanish parents will still want to send their kids off in July. The opening of China as a mega market will increase numbers year round but that will have little or no impact on the traditional summer supplying countries.”

However, there are signs that the market is maturing and shifting slightly. Day points out that “new markets in Eastern Europe and the Far East have developed – the former requiring shorter courses and the latter longer courses”.

This, in turn, has meant a greater spread of nationalities during the summer months and more students through the year. “There is increasingly a balance [to the peak season] provided by longer-term enrolments throughout the year from a broader range of markets,” confirms Susan Gormlie, Manager of Marketing and Admissions at the Australian Centre for Languages in Australia.

Summer selection

Traditionally, the summer market has been characterised by short-term courses – mainly for juniors – that combine language learning with afternoon activities such as sports. Shane Global Village (SGV) offers a summer camp for teenagers in its schools in Canada, Australia, New Zealand, South Africa, the UK and the USA. These types of courses remain popular with students, as Denise Osorio at SGV confirms. “With such a lot of interest in the junior and teen courses, limiting the number of students that we can accept onto our summer programmes is proving to be quite difficult,” she says. “And with the residential courses in the UK, the problem is

“The flow of information between my agency and the school offices responsible for cooperation with agents [should be improved]. Sometimes I have waited several days for an email answer to my questions. [Another problem] is the shortage of host families. I could sell 15 to 20 per cent more places if it were not for the lack of host families.”

Iza Swierczyńska, Almatramp, Poland

The quality-quantity balance

Quality remains one of the key concerns in the peak language travel season. Schools may find themselves short staffed, class capacity may be up to its upper limits, additional classrooms may be sought away from the school and host family accommodation can be operating at bursting point. So how do schools ensure they offer a consistent quality nevertheless? “Host family provision during peak times can be

difficult,” admits Monika Benker of Four Corners Language Institute in Canada. Problems include the placement of students of the same nationality in host families and accommodation that is further away from the school. Although most schools say they strive to avoid such situations, they are sometimes unavoidable during peak times. Sheila McCrann of Ireland West English Language Holidays admits, “While most of our

trying to ensure that student numbers don’t exceed the bed spaces available in the residential accommodation.”

Although the popularity of these courses remains high, because the profile of students has evolved in recent years, language providers have to ensure they continuously tweak their courses to match demand. “Most of [our] summer juniors are schoolchildren in accompanied groups,” says Martin Lemon, Managing Director of International House Torquay and Bath in the UK, which generates between 45 and 55 per cent of their annual enrolments from June to September. “The level of English of those attending our courses improves each year as does the expectation of increasingly varied social and cultural programmes – painting, pottery, drama as well as the usual sports and excursions.”

While expectations of quality are high on the one hand, students expect good value for money on the other. In part, this is owing to the adverse economic climate in some countries. Robert Zuch, Director of Aspiring Language Institute in New Zealand, reports that “Korean students are much more money-conscious these days,” and McCrann in Ireland sees cost as playing a more important role in shaping the summer market of the future. “I don’t see the summer market changing greatly for the foreseeable future, because of the fact that most Europeans, both workers and students, take their vacation during the summer months. However, cost factors are the most likely case of change in trends.”

Day agrees. “The market is increasingly price sensitive and students will take shorter courses,” he forecasts. “I would expect the more sophisticated European markets to have even higher expectations of a quality service so that there will be greater differentiation in terms of price and course type offered.”

Despite being the winter in the Southern Hemisphere, the months from June to September can still be a peak time for some schools there. For example, Queensland College of English in Australia receives around 40 per cent of its annual intake during this time. "The peak times at our college reflect those of the market in general in Australia, but more specifically also for this city [Brisbane]. Brisbane has a sunny, warm winter, and it is possible to [enjoy] many tourist attractions at this time, including beach days," says Hill at the college.

She notes two particular trends at her school that have been driving growth during this period: more short-term study tours which generally comprise students travelling in a group; and more long-term individual students who are preparing for future academic study in Australia.

"I think most schools should advise us when the capacity of the school is full. We have one in Canada that does this. They advise us when they cannot have any more enrolments sometime in advance. This is good to know."

Marco Guimaraes, Esquema Internacional, Brazil

students with very serious language learning goals. Angela Sutherland at Dublin City University in Ireland says their typical summer student population is "a mixture of people who are having a holiday as well as learning English and those who want to prepare for academic study in the autumn".

Indeed, many language providers report that the summer months are increasingly becoming popular for

host families live near the school and within walking distance, we have had to include hosts who live further away, but at most, a journey of three miles, a short bus ride."

Elaine Hill of Queensland College of English in Australia says they have similar problems. "Host family resources can be stretched during [peak times]. We are often required to use host families that are further away. Most students

travel to college by bus and the travel time can increase to 45 minutes."

The actual pressure on host family provision largely depends on the area. For example, in the UK, Bournemouth is an extremely popular language travel destination. As such, says Brian Brownlee at Anglo European School of English, "competition for host families in summer in Bournemouth is acute". He overcomes this problem by "preparing early,

having enough staff and paying good rates". Meanwhile Chester, although a popular tourist destination, is not a prominent language travel destination, so there are few problems finding sufficient quality host families, says Richard Day of English in Chester.

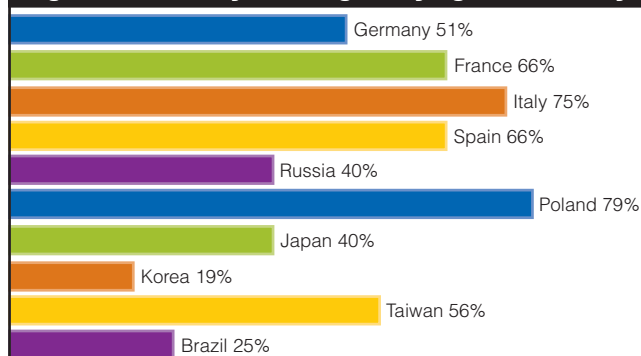
Andalusi, which is a small family-run school in Spain, puts the onus on the host families to ensure their students get to school. "Our students walk to school as

the majority live 10 minutes' walk from the school," relates Carmen Lopez at the school. "In moments of real need we use families who live further away – 10 to 15 minutes by car. It is [the host families] who take [the students] and collect them from school once activities have finished."

Class size can also be stretched to its maximum during the peak times, which is usually around 12 students per class, but can

be 18 students at some schools. Often additional teachers also have to be recruited for the peak times and, it is important that schools ensure the quality of these staff. Many schools say they ensure the teachers have the required qualification, while Day adds that they have "a good induction process and strong academic management" to ensure additional members of staff are of a high standard.

Percentage of student bookings made through agencies for July and August by agents' country



Source: Agency Surveys by *Language Travel Magazine*

This trend towards serious goals is also blurring the definition of the typical summer course. Geoff White of Study Group in the USA reports that students at their North American schools sometimes take a vacation course such as their senior vacation summer course, which includes two half-day and one full-day excursions per week, followed by a course with a more defined outcome such as a Cambridge exam preparation programme. "Starting with our senior vacation programmes allows the students to start English study on our standard course of 20 lessons per week and also get to know the area in which they study, prior to intense study," he explains.

In addition, academic preparation is becoming a greater feature of the summer season. Lemon says that although June and July are likely to remain heavily oversubscribed by juniors, "September is

becoming a much busier month with academic year students and accompanied high school groups".

"A normal problem with any school during the peak season is that they hire teachers on a part-time contract and sometimes these teachers are not qualified for teaching languages to foreign students.

Paolo Polimeni, Interlang – Cursos no Exterior, Brazil

In New Zealand, Aspiring Language Institute launched a new exam preparation course to attract students during their downtime. "[To boost numbers in the quieter times] we started in 2002 to offer an eight-week-long IELTS preparation course in July/August to cater for the Asian students present in Christchurch in winter. The response was good and we intend to repeat it next year," says Zuch.

The summer market now encompasses greater variety than ever before. And Osorio at SGV asserts that summer programmes, even if they follow the traditional activity-based pattern, have a valuable role to play in the new market order. "Activity language programmes are a stepping stone to more advanced studies. We believe that interest in both junior and teen activity courses will continue to rise, as students are determined to get the most out of their school breaks." □