

Italy slows down

A number of factors exerted negative influences on the Italian language teaching market in 2005, as AMY BAKER reports.

Who wants to study Italian?

The range of nationalities important to language schools in Italy varies widely. However, Japanese, German and US students are clearly among the most significant in the market. In our most recent Status survey of Italian language schools, these three nationalities, along with the Swiss, were the most populous (see graphic).

The consensus seems to be that Germany did not perform well last year, although a couple of schools disagreed. Carlo Lipparini of Istituto Il David in Florence relates, "We had a big decrease in the number of requests from the German-speaking market due to the employment crisis currently in Germany." A number of other schools, such as Il Sillabo in San Giovanni Valdarno, back up this claim.

A slight majority of schools indicated that the USA was among their best performing markets last year and even those schools that were disappointed with overall US numbers indicated that they might focus on this market next year. Lorenzo Capanni of Accademia del Giglio in Florence says, "We hope that the American market will recover, especially for undergraduate students."

Otherwise, a trend towards newer student markets is noted by some schools. "We expect a good trend from Russia and [Asian] countries," says Carmelo Manetta of the Italian Language Center Giacomo Leopardi in Belforte all'Isauro, while Cristiana Panicco at Sorrento Lingue adds, "We would like to establish new partnerships with South American and Chinese markets."

Visa issuance has been a headache for Italian language schools over the last year. Lorenzo Capanni from Accademia del Giglio in Florence attests, "Most of the Italian embassies have become stricter, especially in Asia and Latin America. As for African students, it is practically impossible for them to obtain a student visa for a language course [in Italy]."

Other schools confirm that they have experienced a similar situation. Andrea Moradei from Centro Koinè in Florence agrees, "The Italian Foreign Office orders visa offices in the Italian consulates to reject all [applications for] study visas from [certain] countries and all applications for study visas for beginners in the Italian language from the USA, Japan, Australia, New Zealand, etc."

As a result, many schools report that student numbers for 2005 were down compared with 2004, or showed only a small increase. Istituto Venezia in Venice is one school that saw business increase last year and as Matteo Savini at the school points out, "Considering that there are many schools in Italy and that the language of the moment is Spanish, even five per cent growth is not bad."

Alberto Del Mela at Scuola Toscana in Florence has less to be happy about. Like Capanni, he estimates business was down by 20 per cent in 2005. "Thanks to George Bush and the war on terror, everyone seems to be staying at home," he says, "and those who want to receive a study visa are not able [to]." Donna Lynne Galletta at Atrium Istituto di Lingua Italiana in Cagliari attributes a 25 per cent decline at their school to the general world economic situation. "Our school targets vacationers who want to learn Italian while on vacation," she says. "Less money means less vacationers."

So, the threat of terrorism, global economics, visa problems and, as Carlo Lipparini of Istituto Il David in Florence points out, a strong euro, were "the four negative aspects" of the year that really put the brakes on the Italian market. Lipparini notes, however, "the Internet is making everybody's life easier".

Not every school in Italy has had to tighten their belts, either. There are some institutions that point to good growth figures, but in these cases, proactive marketing seems to have been the solution. Anna Paola Bosi at Il Sillabo in San Giovanni Valdarno notes 10 per cent growth and says, "In 2004, we attended four big fairs and we have improved our marketing on the Internet."

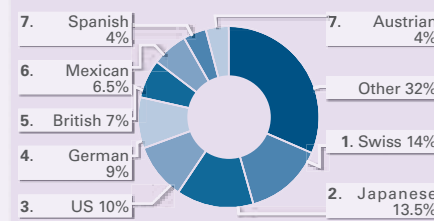
In Cefalu, Vittoria Cirello at Kulturforum, which opened in 2001, relates that as well as increased advertising overseas, "last year we have also invested a lot to optimise our website, and finally many students come to us through personal recommendation". She estimates that they welcomed 30 per cent more students in 2005 than in 2004. At Sorrento Lingue in Sorrento, web and print-based marketing was also more fruitful, says Cristiana Panicco.

Agents are important to Italian language schools, with many institutions putting agencies behind the Internet as the second most important source of students, or in first position overall. And while it seems that the Internet is certainly a focus of new marketing initiatives, two schools, including Kulturforum, acknowledge that they are thinking about expanding their agency partnerships.

For a number of the schools interviewed for this feature, agencies recruit at least one third of all students, and in the most recent



Top student nationalities in Italy, 2004



Source: LTM Status Survey, numbers rounded to nearest half

Status survey of Italy (see *Language Travel Magazine*, November 2005, page 45), agents were said to recruit 41 per cent of clients overall. The Internet was the next most important medium, recruiting 27 per cent of clients on average.

Why students choose to study Italian and how schools can reach them are important questions for the schools to consider. Many sources report a growing demand for specialised Italian and culture courses, which can be marketed through strategic outlets, agents or through various marketing media. Daniel Pietzner, Director of Omnilingua in Sanremo, notes a 40 per cent rise in requests for the specialised Italian, cooking and wine course that they offer.

And in Grado, Francesca Mattiussi-Seaman of Scuola Insieme relates, "Clients want more of a full immersion experience with seminars in Italian culture, particularly Italian cooking, cinema and to a degree, Italian opera and art history."