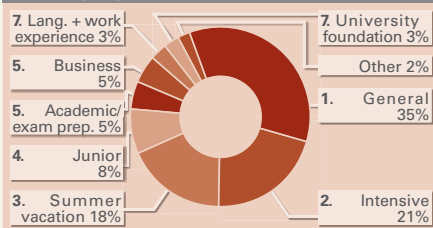


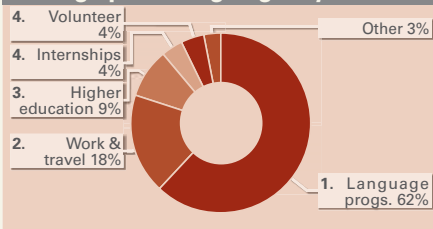
Turkey resolute

The Turkish market fared well in 2008 with agents reporting positive business growth. Meanwhile, fairs and exhibitions provided plenty of new business opportunities for agencies.

Most popular courses



Average percentage agency business

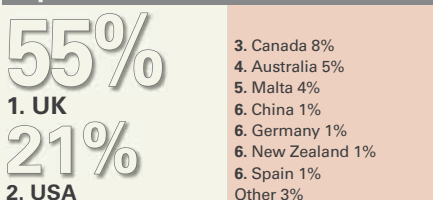


Economic overview

- The Turkish economy has been looking a little vulnerable of late with officials predicting that GDP growth will slow again in 2009 (GDP rate dropped from 2.3 per cent in 2008 to just 0.4 per cent in early 2009).
- It's hoped negotiations concerning Turkey's EU membership will regain some momentum after elections later this year. Progress is still likely to be slow, however. Even under the best-case scenario, membership would not be possible before 2015.
- Consumer price inflation rose to 12 per cent year-on-year in October 2008 from 11.1 per cent one month earlier.

Source: *The Economist*

Top destinations



How do agencies find new business partners?



Market growth

The global economic downturn only really took hold at the end of 2008 and was subsequently not reflected in this year's Agency Survey of Turkey; eight out of 10 agencies indicated that business had flourished in 2008. Average business growth across all of our respondents was a healthy 26 per cent, a slight decrease on the 32 per cent recorded in 2007 (see LTM, September 2008, pages 24-25). However, when looking at individual performances, growth patterns were quite varied with one agent declaring a 70 per cent hike in business while another recorded just a 15 per cent increase. Meanwhile, one agent reported that business had declined by 20 per cent, and another indicated that business had been consistent.

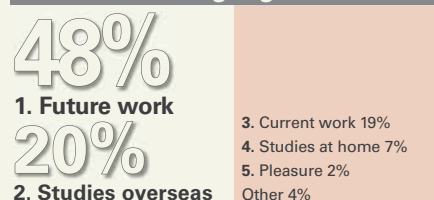
Language and destination trends

The UK continues to appeal to Turkish students, with 55 per cent choosing to study there, up from 46 per cent previously. The USA lost a little of its market share, dropping from a 29 per cent to a 21 per cent share. Canada too was looked upon less favourably with just eight per cent of students opting to study there (four percentage points down on last year). Malta, meanwhile, stormed up the charts, accounting for a respectable four per cent share. The top non-English speaking countries included China (one per cent), Spain (one per cent) and Germany (one per cent).

Student and course trends

Agents reported that 48 per cent of clients were studying another language with future work prospects in mind, a marked increase on the 37 per cent recorded previously. The percentage of students studying a language

Reasons for language travel



How do agencies recruit students?



Key points

- The total number of students placed by the 10 agencies in our survey was **14,350**
- Individual agencies placed between **24** and **12,000** students on courses per year
- Average business growth was **26 per cent** in the last 12 months
- The average length of stay for Turkish students was **17 weeks**
- Overall, **70 per cent** of Turkish students stayed in host family accommodation
- Language learning overseas accounted for **62 per cent** of overall agency business
- On average, agencies worked with **53 schools** in the last 12 months

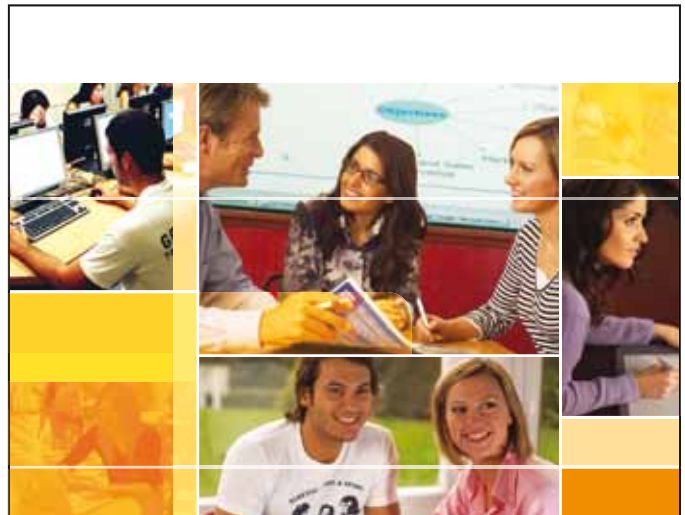
in preparation for higher education abroad dipped significantly, down 13 percentage points to just 20 per cent. Summer vacation programmes were requested by 18 per cent of agency clientele, up six percentage points on last year but general language courses continue to dominate the market, accounting for 35 per cent of all agency requests (the same figure recorded in 2008).

Agency business

Turkish agents were less likely to find new business partners at agent workshops this year – just 14 per cent reported that they had sourced new partners this way, compared with 32 per cent in 2007. Instead, agents acquired new contacts via fairs or exhibitions (up 18 percentage points), the Internet or trade media. Agents still rely heavily on word-of-mouth recommendations to recruit clients (42 per cent), while their website was the second best means of recruiting (21 per cent). On average, Turkish agents represented 159 partners in 14 different countries and had been actively working with 53 schools in the last 12 months.

Looking ahead

Despite working in such a volatile marketplace, several agents expect to see bookings increase over the next 12 months. One very upbeat respondent said that the industry would continue to grow, as Turkish students knew the importance of investing in education abroad. Others, however, determined that enrolment numbers would suffer a little in 2009. One agent expressed his concern over long-term placements, while another announced that they would no longer offer internship programmes due to problems concerning visa issuance.



Hand picked from the best English language schools

Canada

- Access International English Language Centre, Toronto
- CSLI, Vancouver
- Vancouver English Centre
- ECSL, Halifax

Ireland

- ATC Languages and Travel, Dublin
- Cork English College
- The Linguaviva Centre, Dublin

Malta

- Global Village English Centre
- Clubclass Residential Language School

New Zealand

- RELA, Rotorua
- Languages International (Auckland)
- Languages International (Christchurch)

United Kingdom

- Anglolang Academy of English, Scarborough
- BEET Language Centre, Bournemouth
- Cambridge Academy of English
- Churchill House School, Ramsgate
- Devon School of English

- Eastbourne School of English
- Eckersley Oxford
- The English Language Centre, Brighton & Hove
- Excel English, London
- Frances King School of English, London
- ILS English, Nottingham
- Lake School of English, Oxford
- Lewis School of English, Southampton
- Living Learning English, Bristol
- London School of English
- The Language Project, Bristol
- Wimbledon School of English
- Summer Centres**
- Millfield School
- Discovery Summer
- United States of America**
- Boston School of Modern Languages
- South Africa**
- Interlink School of Languages

QE events for Agents 2009

- QE in Taipei **20th February**
- QE in Bangkok **24th February**
- QE in Sao Paulo **17th March**

For further information: agents@quality-english.com

Agents can be sure of

- a fast and flexible response
- a strong partnership with the decision-makers
- a commitment to individual service and attention

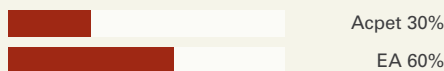
www.quality-english.com



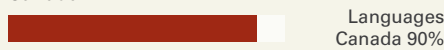
Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations

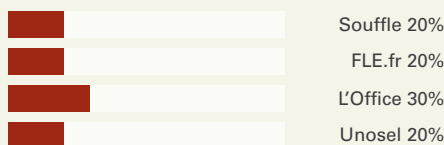
Australia



Canada



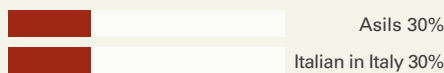
France



Ireland



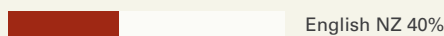
Italy



Malta



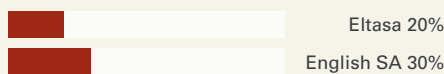
New Zealand



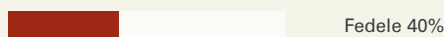
Portugal



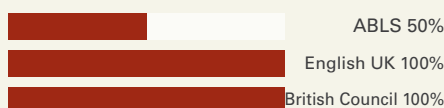
South Africa



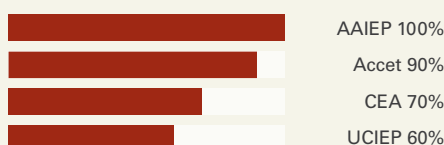
Spain



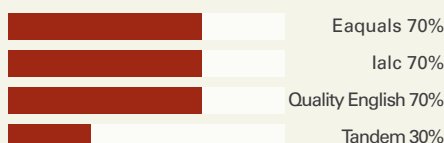
UK



USA



International



Turkish agents named a range of language programmes they work with, including, in Canada: Ilaac – International Language Academy of Canada, Toronto; Pacific Language Institute, various. **In Malta:** Linguatime, Sliema. **In the UK:** Beet Language School, Bournemouth; Bournemouth Business School International, Bournemouth; Churchill House School of English, Ramsgate; ETC International College, Bournemouth; Frances Kings School of English, London; Golders Green College, London; Malvern House, London; Tti School of English, London. **In the USA:** ELS International, various. **Worldwide:** EC English; Kaplan Aspect; International House; Embassy CES; Language Studies International; Sprachcaffe; St Giles International; Geos.

Thank you to the following agencies for taking part in this survey: Horizon International Education Consultancy, Hamle Danismanlik – Study Abroad, Cevik International, Pasifik International Educational Consultancy, IES, Plus Akademi Education & Career Center, Oxford Language Centre, ECE Abroad, Network Educational Services, Global Visions Turkey.