

Italy's game plan

A strengthening euro and increased difficulties in getting a study visa were the most significant reasons for a fall in international student numbers in Italy in 2003. However, schools hope that diversifying into new markets will help maintain enrolments in 2004. BETHAN NORRIS reports.

In common with many other language learning destinations, Italy experienced mixed fortunes in 2003, with challenges such as Sars, the Iraq conflict and the strengthened value of the euro discouraging students from travelling there. As a result, schools are considering expanding and developing new markets in order to preserve their market share.

For Andrea Moradei from Centro Koinè in Florence, an increase in visa refusals proved to have the greatest effect on enrolments in 2003. "During 2003, we had 10 per cent less [students] than in 2002," he states. "We have very big problems with all the markets caused by immigration [policies]. [Visa officers] refuse to give study visas to Chinese students and sometimes they refuse Japanese and US students."

As reported in last year's Market Report on Italy (see *Language Travel Magazine*, May 2003, page 29), visa changes in Italy have made it more difficult for students to obtain a visa for more than three months, and applicants may have to demonstrate prior knowledge of Italian. While many language schools have focused more on the short-term market as a result, visa refusal remains a problem for others.

"Italian embassies in Albania, Algeria and Nigeria did not give the study visa to those students who regularly applied for enrolment and provided all the necessary documents," says Carlo Lipparini, Principal of Istituto Il David in Florence, who also reports a 10 per cent decrease in enrolments in 2003. "[There are also] problems [and a lot of] bureaucracy for countries in South America and southeast Asia."

The long-term language study sector seems to have crashed completely in China and Russia. Lipparini relates, "As far as China



and Russia are concerned, we know that there are problems, but we did not receive [any] long-term [study] requests in 2003."

According to our Status Survey for Italy in 2002, US, German and Japanese students made up nearly 70 per cent of the student body in Italian language schools (see *Language Travel Magazine*, October 2003, page 44). Many schools report that these markets remained strong last year, although Stefania Frappi, from Studioitalia in Rome, says that US students experienced their fair share of visa problems.

"Once, I [was] told by the Italian Embassy in New York that American students can attend Italian language courses at the Italian Institutes of Culture so there is no need to go to Italy!" she relates.

Frappi reports a decrease in US student numbers, but adds, "German and Japanese students have kept a good percentage of enrolments, probably because of the importance they give to foreign language education at university. Furthermore, they do not have problems [with] visas."

At Istituto Il David, the best performing nationalities were Japanese, Korean, North American, German, Austrian and Swiss, according to Lipparini, who adds, "There are few requests from other European nationalities... due to a lower interest in learning

the Italian language and lower financial resources."

The rise in value of the euro last year didn't help market conditions. Tracy Bray, from the British Institute of Florence, believes the economic situation has had the biggest impact on international enrolments. "The euro being so strong has increased the prices for American and British students," she says.

Lipparini says the exchange rate will continue "to play a strong role in 2004". He adds, "It is likely that there will be a decrease in the enrolments from non-European countries – North and South America, Asia and Australia – but at the same time I think there will be an increase in enrolments from the European Union."

Many schools in Italy are beginning to focus their recruitment efforts a bit closer to home. Bray is hoping to appeal to a wider European market in 2004 through the development of a package that will teach Italian and English language courses together.

Frappi, too, has identified one particular market in Europe that she believes has potential for growth. "We are trying to develop the Scandinavian market," she says. "Students can easily get financial aid from the government so this could be of help in recruiting them [and] they do not have problems in getting a visa."

Agent usage

With the difficulties currently being faced by language schools the world over, it is important that they maximise every potential avenue for marketing overseas.

*According to our Student Feedback feature on Italy last year, only 33 per cent of students studying in language schools in Italy found out about their course through an agent or adviser while 35 per cent used the Internet (see *Language Travel Magazine*, January 2004, page 14-15).*

Compared with other language teaching markets, the number of students enrolling in Italian language schools via an agency is very low and there is evidence that the schools themselves don't rely very heavily on agents to recruit their students.

"Our school does not collaborate with many agencies," says Carlo Lipparini from Istituto Il David in Florence, who says that about 35 per cent of students are recruited via an agency. "The Internet – both our website and the presence of a link to us in Internet portals – plays a more and more important role, [recruiting about 40 per cent of our students]," he explains. "Also word of mouth is a significant method of [student] recruitment."

At Centro Giacomo Leopardi in Bellforte all'Isauro, even fewer students are recruited through agents. "We work with agencies for less than five per cent of our total enrolments," says Carmelo Manetta at the school. "Most of them enrol via the Internet (50 per cent), via universities (30 per cent) and word of mouth (15 per cent)."

However, while the Internet is playing an increasingly important role in the recruitment process for Italian language schools, some schools feel that this tool can be used to complement rather than replace agent links.

"Agencies and the Internet are the most successful ways of recruiting students," relates Francesca Pola at International House Milan, while Anna Paola Bosi, from Il Sillabo in San Giovanni Valdarno, says that they are currently looking for a "good agency in Germany" in order to increase their student numbers from this country.