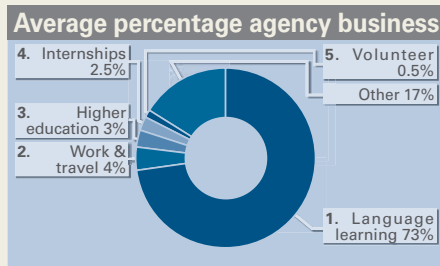
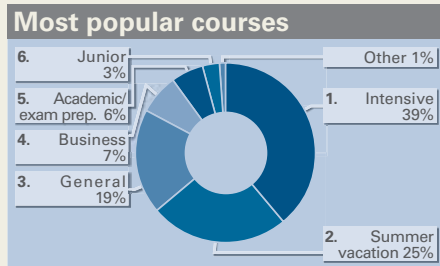


Swiss courage

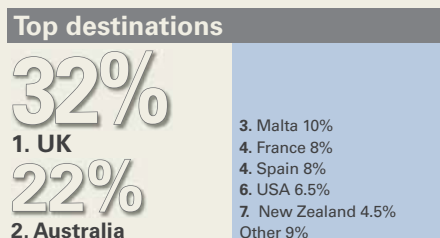
It's been a topsy turvey year for the outbound student market in Switzerland, with economic strife seemingly at the heart of it all. However, agents appear to be taking it in their stride.



Economic overview

- Switzerland's economy slipped into a recession in the fourth quarter of 2008 as global financial crisis took its toll on the country's exports and businesses. The GDP rate fell 0.3 per cent in the final three months of 2008.
- The unemployment rate stood at 3.1 per cent in February, compared with 2.5 per cent a year earlier.
- The Swiss franc saw its biggest ever one-day drop against the euro in March after the Swiss National Bank (SNB) sold francs as part of a drive to help the economy, which also included an interest rate cut and planned bond buying. The SNB's intervention pushed both the euro and dollar to their highest levels against the franc this year.

Sources: Reuters, XE.com and RTT News



Market growth

The mood among agents taking part in this year's Agency Survey on Switzerland was varied. Just one agent reported that business had increased in the last 12 months, while two said that business had slumped by as much as 15 per cent. Meanwhile, two reported that bookings had stayed the same as in previous years and two declined to comment. Consequently, average percentage growth dipped to minus five per cent, a far cry from the 5.2 per cent growth recorded in the last survey on Switzerland in 2006 (see LTM, June 2006, pages 14-15). Average length of stay dropped from 6.9 weeks to just three weeks in 2008 and one agent noted that this could well be a growing trend, where students opt for shorter, more intensive language courses.

Language and destination trends

Although English remains the most popular language to learn (66 per cent compared with 69 per cent in 2005), other European languages like Spanish and German are becoming increasingly popular. Spanish was requested by 11 per cent of all agency clientele in 2008, compared with eight per cent previously, while German demand jumped from four per cent to nine per cent. These trends were also noted in an annual survey conducted by Salta – the Swiss Association of Language Travel Agents. Their findings concluded that Spanish has superceded French to become the second most requested language. Other languages that made the shortlist in this month's survey included Russian (0.5 per cent), Japanese (0.5 per cent) and Chinese (0.5 per cent). The UK has replaced Australia (down seven percentage points to 22 per cent) to become the most

Key points

- Not all participating agencies gave a figure for students placed last year; a total of **2,979 students** were placed by seven agencies
- Average business growth was **minus five per cent** in the last 12 months
- The average length of stay was **three weeks**
- Overall, **65 per cent** of Swiss students stayed in host family accommodation
- Language learning overseas accounted for **73 per cent** of overall agency business
- The UK** is now rated the most popular destination choice for Swiss students
- On average, agencies worked with **45 schools** in **16 countries**

popular study destination for Swiss students. Thirty-two per cent of the student market opted to journey to the UK in 2008 compared with just 10 per cent in 2005. Malta and the USA also increased their market share with a 10 per cent and 6.5 per cent respective share of the market, however, Canada, rated the second most popular study destination in 2005, dropped out of the running entirely.

Student and course trends

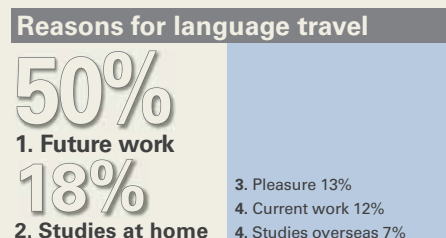
Work remains a big motivator for Swiss students with over half of all agency clientele saying they were learning a language for future (50 per cent) or current (12 per cent) work purposes, while 18 per cent said that it formed part of their academic study at home; a slight decrease on the 22 per cent recorded previously. With this in mind, it is perhaps unsurprising that the number of students opting to take an academic-focused course slowed (down from 14 per cent to six per cent). Meanwhile, intensive programmes – comprising of over 25 hours of language tuition per week – accounted for the mainstay of the market with a 39 per cent share.

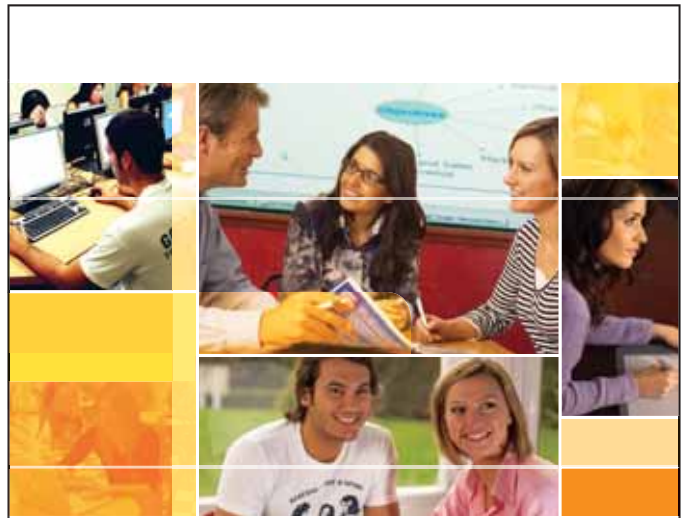
Agency business

Unlike in other markets, mailshots proved lucrative with 19 per cent of all student bookings stemming from this source. However, word-of-mouth referrals continue to deliver a mammoth 42 per cent of clients, while the Internet proved another productive way in which to gain business, also accounting for 19 per cent of enrolments.

Looking ahead

Several agencies reported that until the global economy improved, Swiss students would opt for shorter courses to minimise costs.





Hand picked from the best English language schools

Australia

- Ability Education, Sydney

Canada

- 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 in Europe 2009

November 4th – 13th
Paris, Madrid, Zurich and Rome

For further information: agents@quality-english.com

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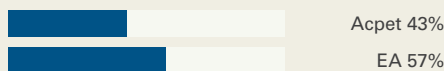
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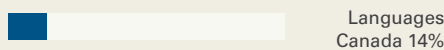
Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations

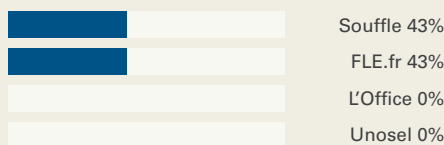
Australia



Canada



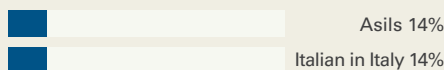
France



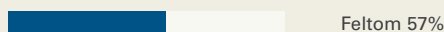
Ireland



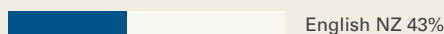
Italy



Malta



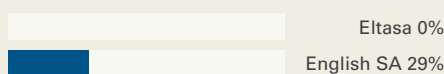
New Zealand



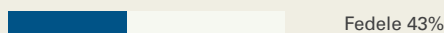
Portugal



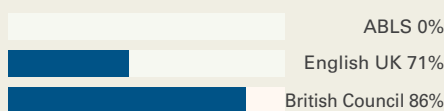
South Africa



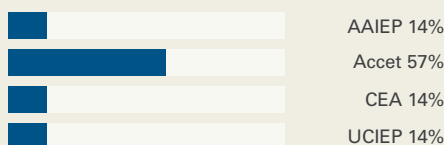
Spain



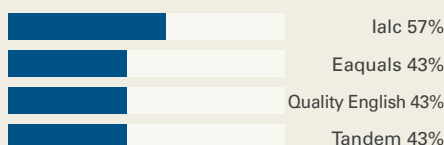
UK



USA



International



Swiss agents named a range of language programmes they work with, including, in Australia: Sea English Academy, Maroochydore, QLD. **In Ecuador:** Estudio Internacional Sempere, Cuenca. **In Germany:** GLS Sprachenzentrum, Berlin. **In Mexico:** Solexico Language and Cultural Center, Playa del Carmen. **In New Zealand:** Seafield School of English, Christchurch. **In Spain:** Estudio Sempere, Madrid. **In the USA:** Converse International School of Languages, San Diego, CA. **In the UK:** Olivet English Language School, Brighton; Regent, various. **Worldwide:** EC, various, Kaplan Aspect, various.

Thank you to the following agencies for taking part in this survey: Lingua Service, Surprise Reisen AG, Summercamps.ch/Feriencamps.ch, ASL – Agenzia per Soggiorni Linguistici, STA Travel, Australia Europe Connection, Globo Study Sprachreisen.