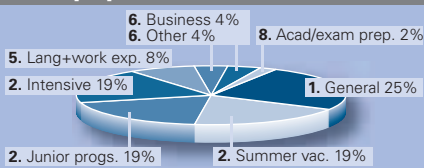


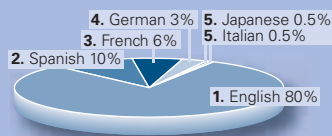
Spain's step up

A healthy economy combined with increased marketing efforts by agents created a positive business environment in 2004, according to the Spanish agents who took part in this year's Agency Survey on Spain.

Most popular courses



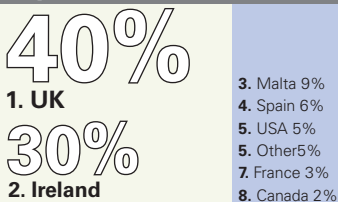
Top languages



Key points

- The total number of students placed by the **17** agencies in our survey was **10,207**
- Individual agencies placed between **80** and **6,000** students on language courses per year
- Average business growth was **43 per cent**
- Just **two** agencies charged their clients a handling fee
- The majority of agents said that business would **continue to improve** over the coming year
- Host family accommodation was the most popular choice for **67 per cent** of Spanish students.
- The average length of stay for Spanish students was **3.5 weeks**
- On average, our agent respondents represented **55 schools** in **9 countries**

Top destinations



How do agencies find new schools to represent?



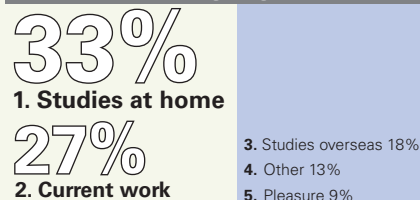
Market growth

Following on from a trend seen in last year's Agency Survey on Spain (see *Language Travel Magazine*, December 2004, pages 12-13), the 17 agencies that took part this year reported that business was good in 2004, with the market growing by 43 per cent overall. Only one agency reported a decrease in business, while the majority posted growth of various degrees and one agency said that their business had increased by 350 per cent on the previous year, which distorted the overall figure slightly. The overall average length of stay was down on 2003 figures, coming out at 3.5 weeks for 2004, compared with 5.1 weeks previously.

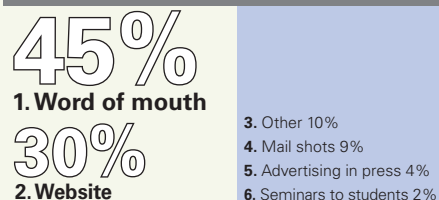
Language and destination trends

The English-speaking destinations of the UK (in pole position), Ireland and Malta were the most favoured by Spanish students, presumably with ease of getting to a destination and lower travel costs playing a big role in the decision-making process. Canada has decreased in popularity since our last survey, attracting just two per cent of clients compared with seven per cent in 2003. More agency clients – 18 per cent – were learning a language overseas in order to go on to further education in a foreign country, compared with the previous year when just 11 per cent of students gave this reason as their motivation. In contrast, the percentage of students planning on using their new language skills for study at home had decreased from 48 per cent to 33 per cent in 2004.

Reasons for language travel



How do agencies recruit students?



Economic overview

- In 2004 and the first half of 2005, the Spanish economy continued an upward trajectory, with GDP increasing by 3.1% in 2004, compared with an increase of 2.9% in 2003.
- Employment growth rose from 2.5% in 2003 to 2.7% in 2004, while the annual average rate of inflation held stable.
- Spain's current high growth rate of economic activity has been largely fuelled by domestic spending and household demand. The depreciation of the euro in the first half of 2005 has also helped enhance the country's exports.

Source: Banco de España

Student and course trends

The percentage of agency clients choosing to study on intensive language courses shot up in 2004, according to our respondents, with such courses accounting for 19 per cent of overall business compared with just four per cent in 2003. This perhaps echoes the trend of students learning a language for more serious educational aims as the number of students on general language courses dropped from 37 per cent in 2003 to 25 per cent. However, summer vacation programmes have also become more popular – up 13 percentage points on the previous year – suggesting growth in all sectors of the outgoing language travel market in Spain.

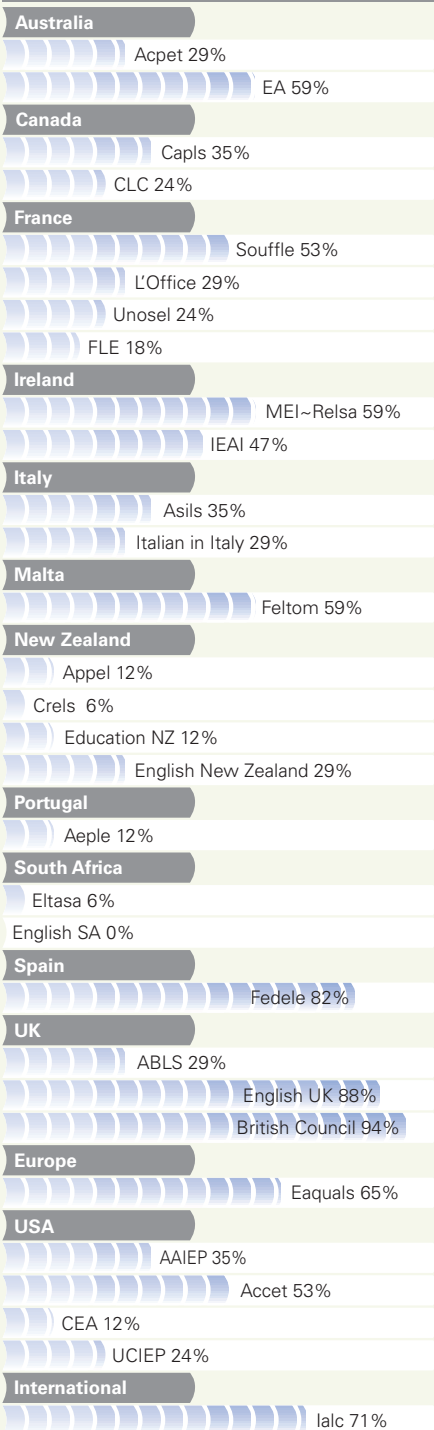
Agency business

Agents reported that they principally relied on word-of-mouth recommendation, as well as their website, to attract new clients to their agency, with 75 per cent of clients found via these methods. In contrast, our previous survey showed that mail shots were the most popular method of client recruitment, attracting 38 per cent of business. This year, only nine per cent of agency business was generated this way. Individual agencies represented between three and 330 schools.

Looking ahead

Forecasts for 2005 and beyond were positive from every agent who gave a response to this question. Predicted increases in business varied from between 10 and 40 per cent, with the majority of respondents pointing to Spain's buoyant economy as being the principal driver of the market. One agency also said that they expected business to grow after an overhaul of their website, which now included multilingual pages.

Percentage of agents who recognised each of the following organisations



Spanish agents named a range of language programmes they work with, including, in Canada: Global Village, various. **In France:** ELFE, Paris. **In Ireland:** Atlantic Language School, Galway, Centre of English Studies, Dublin; Cork Language Centre International, Cork; Emerald Cultural Institute, Dublin; English in Dublin, Dublin; Geos, Dublin; Language Centre of Ireland, Dublin; Linguaviva Centre, Dublin. **In Italy:** Torre di Babele, Rome. **In Malta:** EC English Language Centre, St. Julians; IELS, Sliema. **In South Africa:** Cape Communication Centre, Cape Town; Good Hope Studies, Cape Town; Don Quijote, various; Malaga Plus, Malaga; Proyecto Espanol, Alicante. **In the UK:** Anglolang, Scarborough; Cambridge Centre of English Studies, Cambridge; Chichester College, Chichester; Frances King, London; Hampstead School of English, London; Harven School of English, Woking; Oxford House College, London; Plymouth Language School, Plymouth; Scanbrit, Bournemouth; Select English, Cambridge; Severnvale Academy, Shrewsbury; Sidmouth International, Sidmouth; St. Giles, various; The International School, Exeter; Torbay Language Centre, Torquay.

Thank you to the following agencies for taking part in this survey: Ad Astra; Babel Idiomas; British Summer; Educare Idiomas; Eurobridge International; Globus – Idiomas; Grupo Mundo en Red; Interway; OISE Madrid; Quality Courses; Red Central; Spanish Institute Audio Gil; Study Global Spain; Viajes de Estudio de Lenguas Europeas (VELE).