EUROCENTRES SUCCESS SYSTEM

The innovative EUROCENTRES SUCCESS SYSTEM has been developed over the past 60 years. It is structured in such a way that your customers will achieve their learning goals with the time and money available to them.

How can this be achieved?

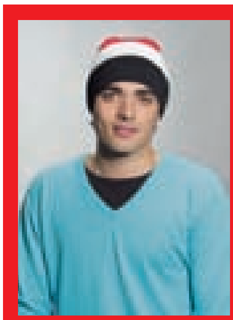
Each Eurocentres student gets a lot of personal attention. That is way you can be sure – your customers will reach his learning goals. In the afternoon Eurocentres students can select from a wide variety of Specialised Lessons.

Personalisation
Individual support, a personal learning programme and an analysis of strengths and weaknesses

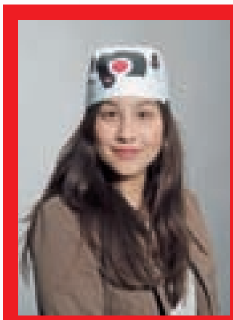
Specialisation
Specialised lessons in language for professional life, exam preparation etc.

Time
Small classes, individual or paired learning, helping you reach your goals in the shortest possible time; 20, 25 or 30 lessons a week

Money
A wide range of courses from advantageous long term courses to exclusive Premium or One-to-One courses. All courses fulfil high internal and external quality standards.

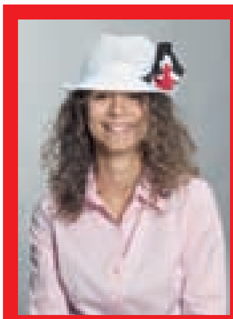


Valter / Brazil:
Valter was about to change from the insurance to the banking sector and to begin working in an international environment. Before he took up his new post, he attended a Premium course for four weeks at London Central. In small group lessons in the morning (8 participants) he improved his general language skills, and in the afternoon, during paired tutorials with the teacher, he got together with a banking colleague from Switzerland to swap specialist terminology.



Rachel / Taiwan:
Rachel wants to study at a university in the USA. In order to achieve her aim, she needs a TOEFL score of 210. During the Academic Semester, she follows the Core programme in the morning and selects specialised TOEFL lessons for the afternoons. She chose Eurocentres Silicon Valley for her course because the school has close relationships with several colleges and universities, increasing the probability of studying at one of these institutions.

Michael / Germany:
In order to be certain of obtaining his high school diploma, Michael brought his French language skills up to scratch. In doing so he combined study and fun. In the mornings he attended the Basic course and in the afternoons he took part in water sports with colleagues from all around the world.



Melanie / Spain:
Melanie wanted to work in the hotel sector. To help her, she first attended a twelve week intensive course in Perth and then continued her studies in her subject area—hospitality. Following the 20 week course, she was awarded a Certificate III in Hospitality Operations from the Australian School of Tourism and Hotel Management, one of Eurocentres Perth's partner institutions.

The global market

The majority of English language destinations reported growth in the market in 2006, according to our annual survey of the global English language travel industry. Bethan Norris details some of the changes that have occurred since our last report.

The English language travel industry continues to grow and develop and this year the trend towards amalgamation and the growth of large language school chains continues. The acquisition of Aspect by language school giant Kaplan was one of the most significant events of the year, while the purchase of Cambridge Education Group by a venture capitalist and the acquisition of EC's first school in the USA, the Olin Center in Boston, MA, proves that the industry remains healthy and continues to attract investors.

Another business trend over the last 12 months has been the move towards privatising English language provision at state universities in the largest English-speaking destination, the UK. Into University Partnerships currently provides English language teaching provision at three partner universities and has invested UK£35 million (US$71 million) in providing state-of-the-art facilities for students at the University of East Anglia as well as an international marketing campaign to promote UK university education overseas.

The importance, both financially and in terms of attracting highly qualified immigrants, of welcoming international university students is at last being recognised by the governments of most of the major English language destinations worldwide. Recent visa policy changes mean that international graduates from universities in Canada, Australia, New Zealand and the UK can stay on in their host country to work after graduating and in some countries this is a major part of their immigration policy. The fact that investors are recognising the link between English language teaching and international student recruitment for universities suggests that the academic preparation sector of the market will continue to grow and play a major role in boosting English language enrolment figures in the future.

The market in 2006

Our annual comparison of statistics for the major English language travel destinations worldwide uses a variety of sources in order to provide a snapshot of the industry and its changes year on year. This year, our statistics for 2006 show that overall student numbers reached 1,345,589, a 5.8 per cent increase on the 1,271,635 figure calculated last year, and reveal an industry with healthy growth patterns. However, owing to total student weeks and total revenue generated were both down on last year, largely due to more accurate statistics being available for the UK.

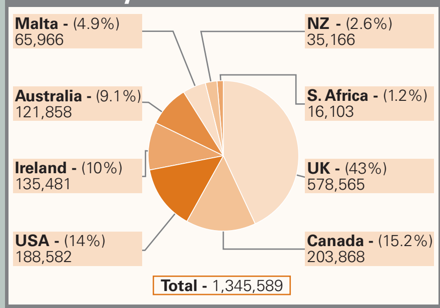
This year, more concrete statistics have become available for the state sector English language teaching market, showing that our previous calculations were too high. This revision of the UK figures means that the market share for our English language destinations looks slightly altered this year. In terms of student weeks, the UK now accounts for 30.7 per cent of the total market when previously we calculated that this figure was closer to 43.7 per cent. This change means that the US market share has increased to 23.9 per cent, up from our previous estimate of 18.1 per cent. Australia has also gained market share in our calculations this year, up to 13.3 per cent from 10.6 per cent previously.

In terms of student numbers, our new calculations for the UK have made less of a difference in the division of market share, with the UK accounting for 43 per cent of the market, compared with 46.1 per cent previously. Canada has also held on to its place as the second largest market for student numbers, attracting 15 per cent of total students, above the USA, which accounted for 14 per cent of the market – a similar figure to last year.

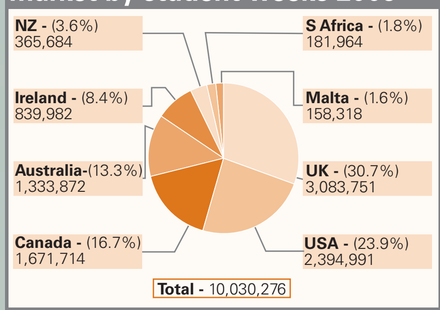
Average length of stay

While student numbers in Canada are shown to be eight per cent greater than those in the USA, the situation is completely >>

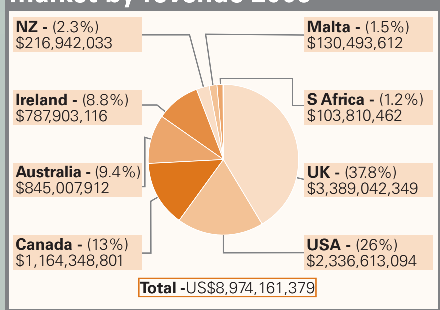
1. Global English language market by student numbers 2006



2. Global English language market by student weeks 2006



3. Global English language market by revenue 2006



reversed when it comes to student weeks as the US market is 43 per cent larger than Canada's. This margin of difference in student weeks between the two countries has grown considerably since last year and can be attributed to the fact that the USA now has the longest average length of stay per student, at 12.7 weeks, of any of the destinations looked at.

This trend towards a longer average length of stay in the USA can be attributed to an increase in academic preparation programmes offered by language schools in order to cater for the demand for university places among international students – as noted in our recent Market Report feature on the USA (see *Language Travel Magazine*, September 2007, page 53). A large increase in the number of students from Saudi Arabia, studying English on a scholarship from the Saudi government, with a view to going on to university in the USA, could also have influenced this figure and IIE's *Open Doors* statistics show that enrolments on English programmes from this country increased by 342 per cent between 2004 and 2005.

South Africa is another destination where the average length of stay has increased in recent years and it is now in second place behind the USA in the length of stay league table, with 11.3 weeks. Reasons for this trend can be found in our Market Report feature on South Africa earlier this year, which showed that schools are increasingly venturing into the business, academic and Tefl training markets, all of which are likely to send the average length of stay upwards (see *Language Travel Magazine*, April 2007, page 24). The fact that South Africa also has the lowest average spend per student per week could also be a factor in encouraging students to study on longer language programmes.

Changing trends

Destinations doing particularly well, according to our comparison of global statistics, include South Africa and Ireland. South Africa now has a larger market share than Malta in terms of student weeks and the industry is calculated to be worth US$103,810,462 to the country's economy, compared with US$44,161,320 previously.

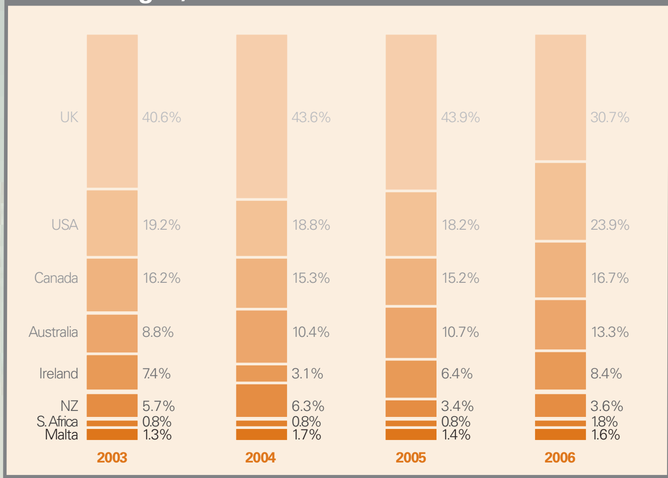
The revenue earned from the English language travel market in Ireland has also increased to US$787,903,116 – up 43 per cent from our calculations last year. Student numbers and weeks are both up substantially on last year's results, while the average weekly spend for students has also crept upwards from US$805 previously to US$976. Adrian Cummins from Irish School Association MEI-Relsa says that the figures for 2006 could be even higher. "We think that

> *"This trend towards a longer average length of stay in the USA could be attributed to an increase in academic preparation programmes offered by language schools"*

the statistics collected by Bord Failte are a bit low. 2006 was a good year for Irish language schools – helped mainly by the EU grants to study English. We had about 10,000 extra Spanish students as a result in the first year."

The Canadian language teaching industry is also doing particularly well at the moment, retaining its place as second largest in terms of student numbers for the second year. Gerry La Belle from the newly merged school association, Languages Canada, says that student numbers continue to rise. "From anecdotal information from members, it appears that the language training market in Canada is moving in an upward direction. Student numbers have rebounded over the last two years, following the various global events which adversely affected the industry since 2001," he said.

4. Changes in market share by student weeks taught, 2003-2006



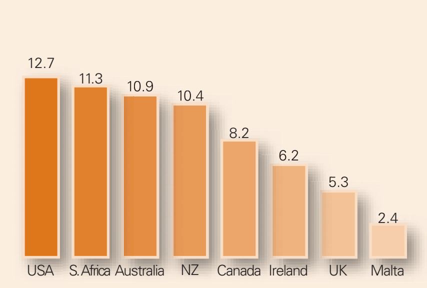
For the first time this year, Malta was calculated to have more students than New Zealand although, due to its low average length of stay of 2.4 weeks, this destination remained bottom in terms of student weeks. John Dimech from school association Feltom says, "The [Maltese] ELT market has constantly increased by an average of nine per cent for the past 10 years. Potentially this can increase to 100,000 students a year in the next five years."

The UK also had a good year in 2006, with student numbers at schools accredited by English UK up by 6.6 per cent on 2006 >>

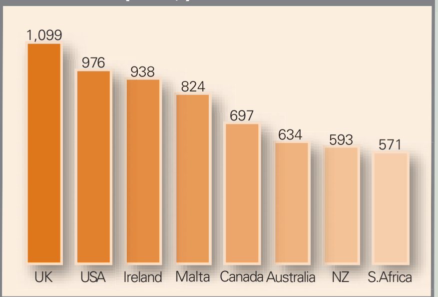
and student weeks increasing by 11.6 per cent. Tony Millns, Chief Executive of English UK, confirms, “2006 was a very good year, probably the best for 6-to-7 years, for the UK.”

One student market, however, did not perform so well in 2006. Statistics for New Zealand show that student numbers declined by two per cent while student weeks stayed almost the same as the previous year’s results. This can largely be attributed to a decline in students from China – one of the country’s biggest student markets. Chinese student numbers decreased by 50.5 per cent between 2005 and 2006.

5. Average length of stay per country



6. Average spend per student per week ‘06 (US$)



Future change

When it comes to predicting what the future holds in terms of market share, it is likely that the positions of the smallest four countries – Ireland, Malta, New Zealand and South Africa – will continue to change as they develop. And while the position of the UK as top destination for English language learning seems assured at present, increased competition from other destinations is likely in the future.

Millns says, “Main competitor destinations are Australia and Ireland, but the USA has started to recover from the visa issues and is now doing quite well, helped also by the weakness of the dollar.”

Javiera Visedo from New Zealand Global in Chile says that she expects South Africa and Ireland to grow as language travel destinations in the future, although Australia, Canada and New Zealand are the most popular with clients at the moment. However, perceptions of study destinations are changing. She adds, “Higher education is still dominated by the USA and UK, especially for the most traditional universities, but Australia and Canada have been doing great work too in the past four years, setting their universities in the minds of prospective students.”

“For the first time this year, Malta was calculated to have more language students than New Zealand”

James Herbertson from Answer English in the UK says that high profile sports events will also have an effect on the market. “I think places like Beijing in 2008, South Africa in 2010 [for the World Cup] and undoubtedly London [for the Olympics in 2012] will attract greater numbers than ever before,” he says.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