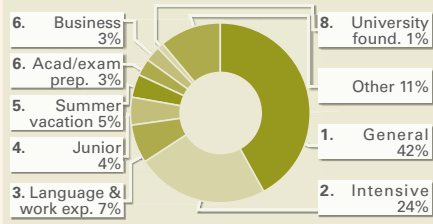


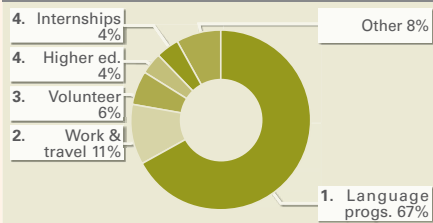
Japan meandering

Business prognosis in Japan seems to depend on the agency, with some reporting more positive results than others. A slight decline in university-bound students is one trend to be apparent this year, as is a growth in demand for French language programmes.

Most popular courses



Average percentage agency business

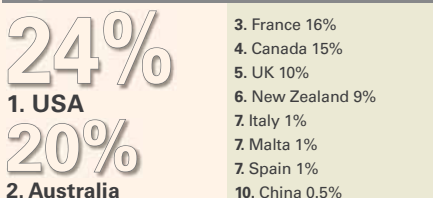


Economic overview

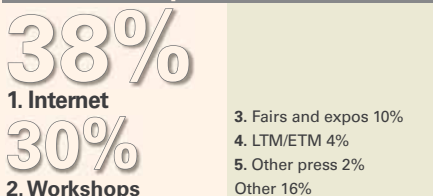
- Despite a stronger than expected GDP in the first quarter of 2008, Japan's economic outlook is weak: GDP is forecast to grow by one per cent in 2008 and 1.2 per cent in 2009.
- Japan's economy is vulnerable to rising international fuel and commodity prices as the country has few natural resources and depends on imports. Meanwhile, the yen weakened further against the US dollar earlier this year. The revised exchange rate now stands at ¥103.7 to US\$1 in 2008.
- Construction and real estate are two areas that have been affected greatly by a weak economy. The number of companies filing for bankruptcy in Japan rose by 4.2 per cent in August this year. 403 construction firms are said to have led the way as well as 244 companies in the services industry.

Source: *The Economist and Japan Economy News*

Top destinations



How do agencies find new schools to represent?



Market growth

Feedback regarding business growth was extremely varied among the eight Japanese agents that took part in this month's Agency Survey. Two agents noted that business had grown substantially in 2008 (one agent recorded an impressive 200 per cent increase in their business) while others reported that business had dipped by around 10 per cent. Overall, average business growth came in at 42 per cent, down on the (itself impressive) 73 per cent of last year's survey (see LTM, October 2007, pages 14-15). Interestingly, one agent noted that the decrease in the number of Japanese students opting to study abroad may be a direct result of escalating surcharges on flights. Meanwhile, two agents agreed that business was much the same as last year and two agents declined to comment.

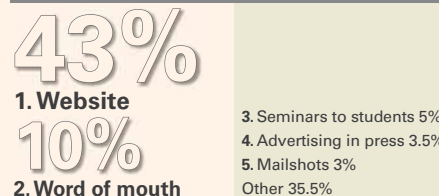
Language and destination trends

The USA retained the title of top destination among Japanese students this year; attracting 24 per cent of student clients (up two per cent on last year), closely followed by Australia with 20 per cent of the market. As a world region, Australasia fared extremely well in this year's survey, with New Zealand attracting nine per cent of students (up from one per cent last year). Meanwhile, non-English-speaking destinations continue to go from strength-to-strength with 16 per cent of agency clientele opting to travel to France this year, compared with 10 per cent in 2007. A small percentage of students were interested in journeying to Italy and Spain (one per cent each), a trend that was entirely absent last year. One agency dealt solely with the French language market, although several agencies reported increased interest in French language courses abroad.

Reasons for language travel



How do agencies recruit students?



Key points

- The total number of students placed by the eight agencies in our survey was **8,693**
- Individual agencies placed between **five and 5,000** students on courses per year
- Average business growth was **42 per cent** in the last 12 months
- The average length of stay for Japanese students was **12 weeks**
- Overall, **74 per cent** of Japanese students stayed in host family accommodation when studying overseas
- Only **two** of the eight agencies charged their clients a handling fee
- On average, agencies worked with **149 schools in 11 countries** in the last 12 months

Student and course trends

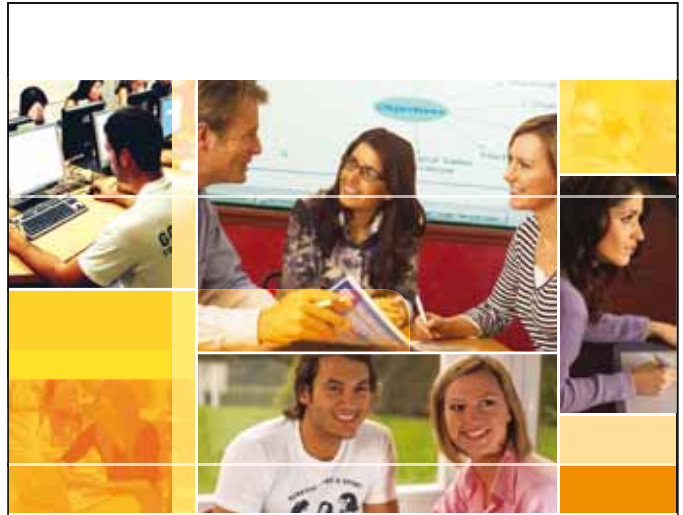
Forty three per cent of agency clientele were taking a language course in preparation for their further studies overseas, only one percentage point more than last year. However, there was a hike in the number of students studying towards an academic course at home, 14 per cent compared with just five per cent previously. Academic preparation courses, considered a growth area in 2006, suffered somewhat (down 10 percentage points to just three per cent this year), while there was a marginal increase in the number of students looking to combine language studies with a work opportunity (from four per cent to seven per cent). One agent said that in the next 12 months internships and volunteering would be a real growth area.

Agency business

Sixty-seven per cent of all agency business fell into the language learning sector this year, compared with 46 per cent previously. Again, there was a real decline in the number of Japanese students interested in tertiary education abroad; just four per cent of agency business fell into the higher education category compared with 34 per cent in 2007. Instead, the work and travel sector picked up momentum and accrued an 11 per cent share of agency business, compared with just six per cent previously.

Looking ahead

Overall, Japanese agents have a positive outlook for 2009. One agent forecast that the 50-plus market would increase considerably in the coming year, while another agent said that academic and foundation programmes in the UK looked set to see higher demand.



Hand picked from the best English language schools

Canada

- Access International English Language Centre, Toronto
- CSLI, Vancouver
- East Coast School of Languages, Halifax
- Vancouver English Centre

Ireland

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

Malta

- Clubclass Residential Language School
- Global Village English Centre

New Zealand

- Auckland English Academy
- Languages International, Auckland and Christchurch
- Rotorua English Language Academy (RELA)

South Africa

- Interlink School of Languages, Cape Town

United Kingdom

- Anglolang Academy of English, Scarborough
- BEET Language Centre, Bournemouth

- Cambridge Academy of English
- Churchill House, Ramsgate
- Devon School of English
- Eastbourne School of English
- Eckersley Oxford
- English Language Centre, Brighton and Hove
- Excel English, London
- Frances King School of English, London
- ILS English, Nottingham
- Lake School of English, Oxford
- Lewis School of English, Southampton
- London School of English, London
- Millfield English Language Holiday Courses
- Wimbledon School of English, London
- Boston School of Modern Languages

Bosnia

- Soros School, Sarajevo

Poland

- York School, Krakow

Turkey

- British Side

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

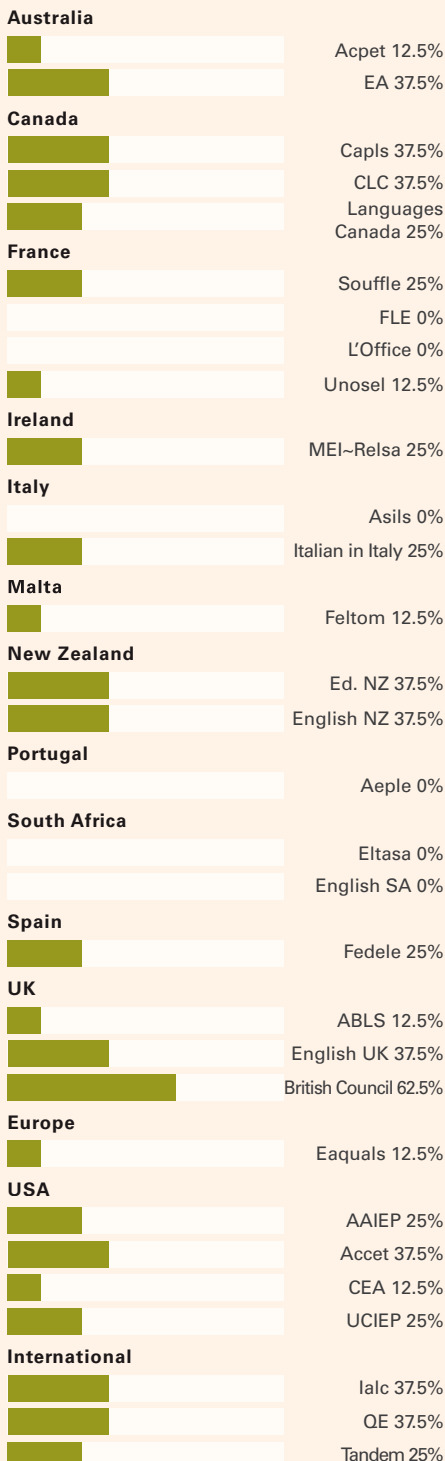
- a fast and flexible response
- a strong partnership with the decision-makers
- a commitment to individual service and attention

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Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations



Japanese agents named a range of language programmes they work with, including, in Australia: ACE, various; Geos International, various; International College of Queensland Australia, Brisbane, QLD. In Canada: Global Village, various; Pacific Language Institute, various; Vancouver English Center, Vancouver, BC. In France: Accent Français, Montpeller; Alliance Français, Rouen; PERL, Paris; Tours Langue, Tours. In New Zealand: Rotorua English Language Academy, Rotorua; Worldwide School, Auckland. In the UK: Avalon Institute, London; Language Specialists International, Portsmouth. In the USA: FLS International, Los Angeles, FL; Intrax Institute, San Francisco, CA. International: EC; EF; Embassy CES; Eurocentres; Kaplan Aspect.

Thank you to the following agencies for taking part in this survey: AJ France, Earthing Co. Ltd, ECC International (Namba Office), Gio Club Study Abroad, My Inc - My Ryugaku Center, NES Study Abroad Center, Language Career Support, Ryugaku Journal Inc.