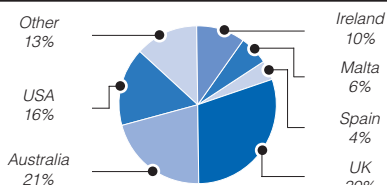


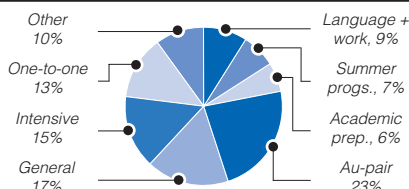
France's modest rise

The French market increased in 2003, although many agents said that their businesses were less than buoyant due to growing price concerns among their clients.

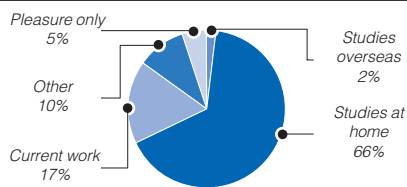
Top destinations



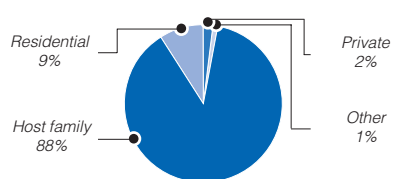
Most popular courses



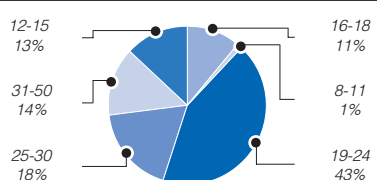
Reasons for language travel



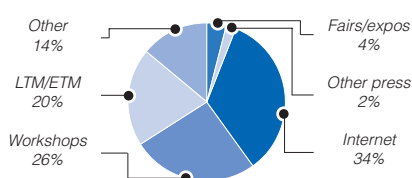
Accommodation preferences



Age range of clients



How do agencies find new schools to represent?



Key points

- The total number of students placed by the seven agencies in our survey was 3,088
- Individual agencies placed between 298 and 750 students on language courses in 2003
- Average growth of combined agency business was 10 per cent
- Only one agency charged their clients a handling fee
- Commission rates varied from 10 to 25 per cent and averaged out at 19 per cent
- On average, agents represented 40 schools overseas in 11 countries
- Typically, only six per cent of clients approach French agencies with a school in mind
- On average, agents forged partnerships with five new schools in 2003

Market growth

Overall, French agency business grew by 10 per cent in 2003, according to this year's Agency Survey, with five out of the seven agents who responded reporting an increase in their business over the previous year. This increase is less than the previous year when our survey results indicated an average increase of 30 per cent (see *Language Travel Magazine*, July 2003, pages 10-11). Some of the reasons given by agents for the lack of buoyancy in their business included the rising costs of language travel and the short study period favoured by French students for studying a language overseas.

Student trends

Our survey this year showed a growing trend for French students undertaking a language learning trip abroad for the sake of their studies at home, with agents reporting that 66 per cent of their clients overall gave this reason as their motivation for studying overseas. Last year, only 27 per cent of agency clients were learning a language for this reason while the majority, nearly 48 per cent, gave current work purposes as their main motivation. The 18-to-20 year old age group was identi-

fied as showing the most promise for future growth, according to nearly 50 per cent of our respondents.

Language and destination trends

English was by far the most popular language choice among agency clients, with 79 per cent of clients choosing to study English in 2003. Spanish was the second most popular choice, followed by German and Italian. The most popular destinations with students were the same as in our previous survey with the UK on top, followed by Australia, the USA, Ireland and Malta. However, Australia's share is skewed because one agency only sent students to this country. A higher number of students opted for au-pair programmes in 2003 compared with the previous year, although one agency dealt

exclusively with au-pair bookings. Other popular types of programme were general, intensive and one-to-one courses.

Agency business

The Internet and word-of-mouth remained the most successful means of reaching new students with 42 per cent and 37 per cent of clients recruited by these methods in 2003. The Internet is now the most successful student recruitment method, up from second place in our previous survey, accounting for 42 per cent of new bookings. July was the most popular month for language travel in 2003 with 27 per cent of French students choosing this month to travel overseas to learn a language. A further 15 per cent of students preferred to study in June or September and 10 per cent in August.

Economic overview

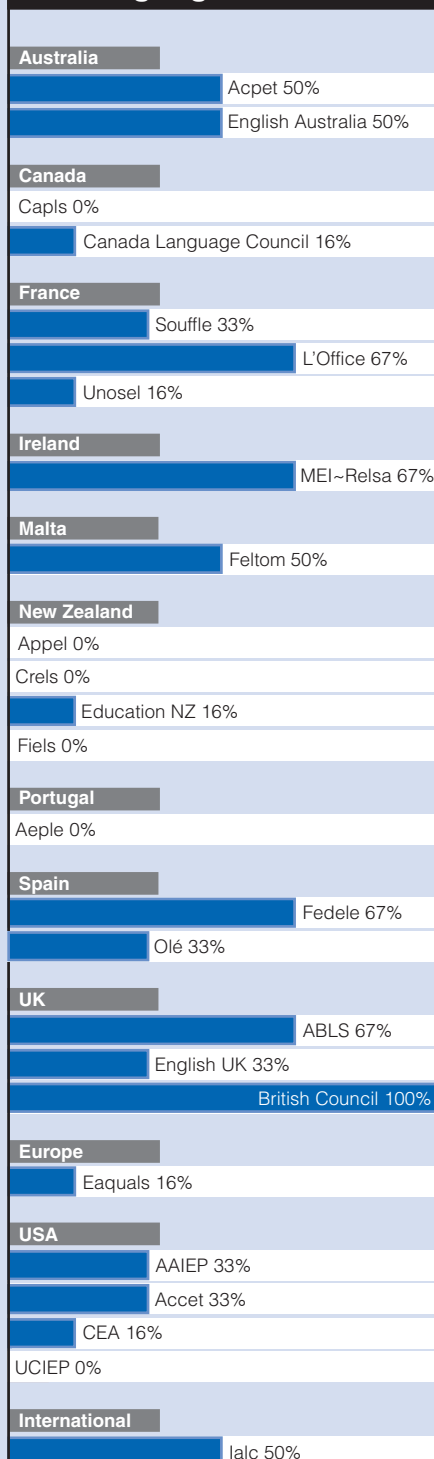
- France's economy has been experiencing something of an upturn in recent months, growing by 0.8% in the first quarter of 2004. This figure was an improvement on the 0.5% increase predicted by economists.
- Household consumption is playing a major role in boosting France's economy although the upturn experienced so far has had little noticeable effect on employment levels.
- Inflation is expected to reach a peak of 2.6% in 2004, before returning to a steady 2% by the end of the year. The average annual GDP growth for 2004 is expected to be 2.3%.

Sources: INSEE

Forecast for 2004

Agents were largely non-committal about what the future holds for the year-end with few respondents giving an opinion. But one agent did say that they would continue to look for programmes that offered value for money in order to respond to student demand for cheaper or value-for-money courses in the French marketplace.

Percentage of agents who recognised each of the following organisations



Thank you to the following agencies for taking part in our survey: AFJE - Accueil Familial des Jeunes Etrangers, Arts et Séjours en Asie-Pacifique, Aubert Ermissse Tours, Centre Easylangues, Experiment France, Languages & Travel, Séjours Homestay.

French agents named a range of language programmes they work with, including, in Ireland: Dublin School of English, Dublin; Horner School of English, Dublin. **In Malta:** Burlington Academy of English, St Julians; **In the UK:** St Giles College, London; The English Language Centre, Bristol; Twin Training International, London. **Worldwide:** Home Language International.