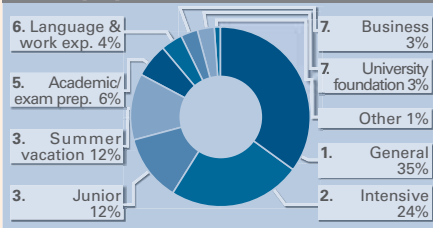


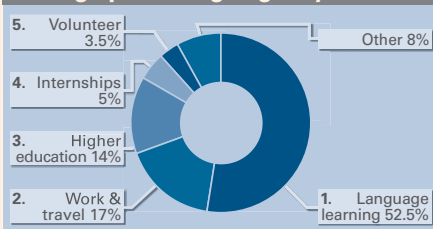
Turkey upbeat

The market in Turkey remains robust and largely focused towards the UK, with good growth recorded and little change in trends since 2007, except Canada gaining market share.

Most popular courses



Average percentage agency business

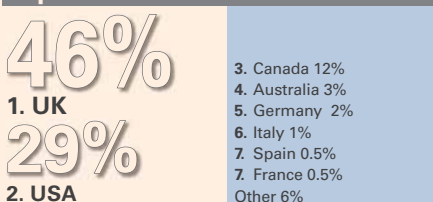


Economic overview

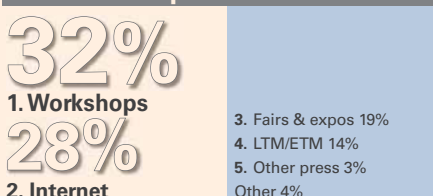
- The Turkish economy has been prospering for the last five years with an average economic growth rate of seven per cent. Turkey's economy is now ranked as the sixth strongest among European nations.
- Foreign direct investment (FDI) reached a record high of US\$22 billion in 2007, making Turkey the fifth-largest recipient of FDI among developing countries and the 16th in the world.
- However, the oil-dependent economy is likely to slow down slightly amid high oil prices and a global credit crunch. Inflation is rising and predicted economic growth is from four to five per cent in 2008.

Sources: Today's Zaman, The Economic Times

Top destinations



How do agencies find new schools to represent?



Market growth

Many agencies that took part in this year's survey gave impressive growth statistics, with seven agencies posting growth of 50 per cent or more in the last year. Reasons for this include an agency opening new offices or more long-term year-round students enrolling. With just one agency posting a drop in business of 60 per cent, overall business growth stood at 32 per cent. This is slightly higher than the 29.4 per cent growth recorded in our previous survey of the Turkish market (see LTM, March 2007, pages 16-17).

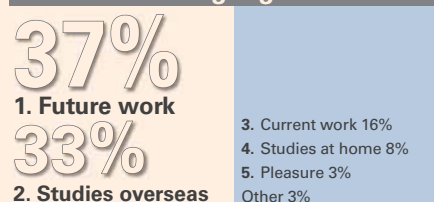
Language and destination trends

The UK remains the most popular destination for Turkish clients, with a slight gain (46 per cent compared with 43 per cent in our previous survey), while the USA also retains its second position with 29 per cent market share. This year, it seems that Australia has lost out to Canada, with 12 per cent of clients going to Canada and only three per cent to Australia, down from 10 per cent last year. English was studied by 83 per cent of students with the next most significant language requested being German (nine per cent).

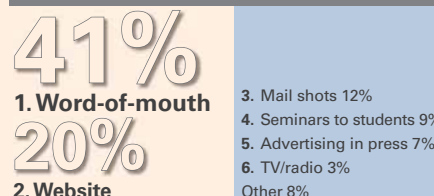
Student and course trends

Nearly 60 per cent of students chose general or intensive language programmes, and a further 12 per cent enrolled on summer vacation programmes, despite the fact that 33 per cent of students were said to be studying for further studies overseas. Junior programmes were also significant; chosen by 12 per cent of clients – these patterns were the same as in our previous survey. Just over half (51 per cent) chose host family accommodation and 35 per cent opted for

Reasons for language travel



How do agencies recruit students?



Key points

- The total number of students placed by the 18 agencies in our survey was **16,061**
- Individual agencies placed between **one** and **10,000** students on courses each year
- Average business growth was **32** per cent
- The average length of stay for Turkish students was **11 weeks**
- Language learning overseas only accounted for **52.5 per cent** of overall agency business
- Canada** gained market share this year at the expense of Australia while the UK remained on top
- Only one agency charged clients a **handling fee** of US\$150 for US bookings only
- In the last 12 months, agencies worked with an average of just **24** different language schools

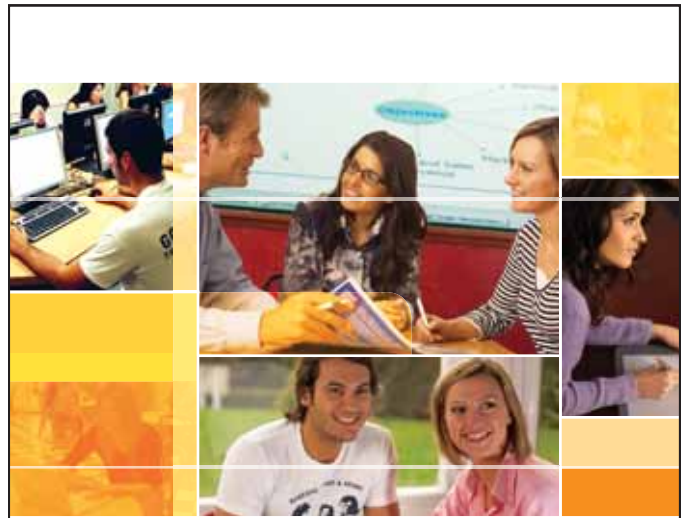
residential. Only three per cent of clients were estimated to be studying for pleasure only.

Agency business

Agencies relied on word-of-mouth recommendation primarily to recruit clients, and the website was the second-most useful recruitment tool, ahead of mailshots. Although agencies had relationships with an average of 150 partners, active business in the last 12 months was typically with just 24 different schools, although many agencies named large chain schools among their business partners (see box). In order to find new partners, agencies used a real combination of sources, including workshops, the Internet and *Language Travel Magazine* (LTM). Overall, language placement only accounted for just over half of an agency's activity – work & travel programmes and higher education placement were also notable business segments for Turkish agencies.

Looking ahead

Most agencies felt confident that business would continue to grow, with one agency noting good exchange rates with other countries and another pointing to growing awareness among the public of the value of study abroad. As possible dampeners, one agency mentioned work & travel programmes were slightly eroding interest in language programmes, while another noted some visa problems, although they said Australia would win bookings as a result of this. Finally, one respondent said that "in spite of an economic slowdown," in the country he expected growth of at least 10 per cent – so Turkey certainly remains upbeat.



Hand picked from the best English language schools

Canada

- Access International English Language Centre, Toronto
- 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

QE events for Agents 2008

- QE invites agents in the Ukraine to meet the QE schools on **7th October in Kiev**
- QE invites agents in Poland to meet the QE schools on **9th October in Warsaw**

For further information: agents@quality-english.com

Agents can be sure of

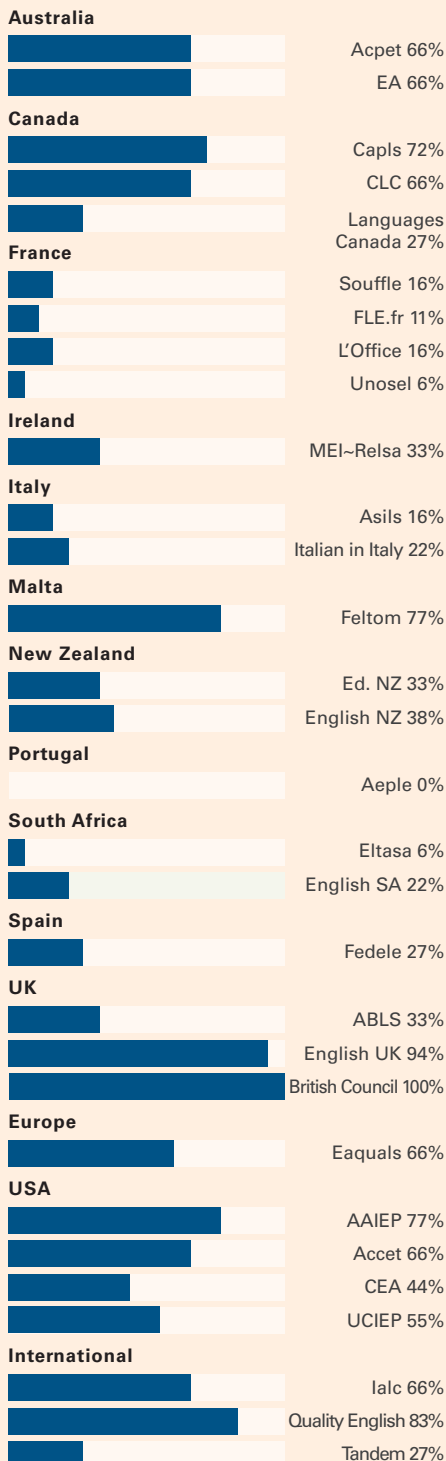
- a fast and flexible response
- a strong partnership with the decision-makers
- a commitment to individual service and attention

www.quality-english.com



Images: Anglolang Academy of English and Hampstead School of English

Percentage of agents who recognised each of the following organisations



Turkish agents named a range of programmes they work with, including, in Australia: Ability Education, Sydney, NSW; La Trobe University, Melbourne, VIC; Stiefston International College, Brisbane, QLD; University of Melbourne – Hawthorn, Melbourne, VIC; University of Technology – Sydney, NSW. **In Canada:** Geos, various; IAC, various; King George International College, Vancouver; McKinsey International College, Toronto; P.I, various. **In Germany:** Eurasia Institute, Berlin; Goethe Institut, various. **In the UK:** Beet Language Centre, Bournemouth; Cavendish School of English, Bournemouth; ETC College, Bournemouth; Hampstead School of English, London; King Street College, London; Melton College, York; Moira House, Eastbourne; Studio School of English, Cambridge; Twin, London; Westbourne Academy, Bournemouth. **In the USA:** ELS Language Centers, various; Zoni Language Centre, New York, NY. **Worldwide:** EC; Eurocentres; Study Group; Kaplan Aspect; St Giles; Sprachcaffe; LSI; EF.

Thank you to the following agencies for taking part in this survey: Cevik International; Alternatif; Arin Egitim Danismanlik; Omega Education; Nil Danismanlik; Teorem International Education Consultancy; Global Visions; Done Education Consultancy; Academy English Educational Counselling Services; Dil-Vies Study Abroad Advisory Agency; Endinspection Co.; Bogazici (Bosphorous) Education Counselling Services; Horizon International Education Consultancy; Poseidon Work and Study Abroad; Genctur; 1 dil 1 insan; EduYork; Galata Education Consultancy.