



Independents in demand

© Created: Sunday, 01 November 2015 11:01

Claudia Civinini analyses the 2015 IALC research to reveal what language travel agents really look for in a partner institution

The International Association of Language Centres (IALC) commissioned in-depth research from StudentMarketing into the study travel industry, with a particular focus on agents' opinions. What emerged is not only a general picture of the trends that govern the industry (see September 2015 *Gazette*) but also, for the first time in the industry's history, a factual, measurable and evidence-based peek into the agents' preferences and experience of working with independent and chain schools. An impressive 474 agents from 72 countries participated in the research, which included both a survey and a phone interview.

Overall, agents seem to prefer working with independent schools and boutique chains (smaller chains of five or fewer schools) overwhelmingly because of their ability to offer easier access to senior management and their flexibility. Countries showing the highest number of agents displaying this tendency were Brazil, Italy, Spain, Russia and Switzerland. Some 64 per cent of agency customers opt for independent schools, and 59 per cent of agents think that highlighting their independence would be beneficial for the schools' marketing. Independent schools and boutique chains are usually preferred for personalised programmes and general English, whereas chains dominate in the pathway sector (preparation for university entry).

IALC provided the *Gazette* with an additional set of data from StudentMarketing which analyses the responses of the two ends of the agent market: large agencies serving more than 2,000 students and small agencies serving less than 250 students, both in 2014.

The research shows that agents generally send more students to independent schools than chains. However, while this is true for small agencies, which send 64 per cent of their students to independent schools and 36 per cent to chains, the situation is different for large agencies, which seem to have a very slight preference for chains, where they send 53 per cent of their students.

The agents were asked to compare independent schools and chains according to a series of factors that shape the agent-provider business relationship, such as 'easier to trust' or 'more difficult to find partner'. Agents had to indicate which type of school is best matched to each factor, and they had the option to say that both types of centre fit the description.

While the general trend still holds true, there are differences in what small and large agencies value in the two types of school. For example, small agencies praise independent schools for their ability to provide agency support and higher customer satisfaction twice as much as large agencies. Also, small agencies are twice as likely to match 'higher commissions' and 'lower price' with independent schools as large agencies (see Figure 1 for more information).

There was another question about the type of programmes for which agents prefer one type of language centre over the other. Some trends can be observed. For example, large agencies prefer chains for language and academic studies, summer camps for juniors and exam preparation. Conversely, small agencies prefer chains for teacher training and professional and executive courses. Small agencies seem to be more opinionated in this area, as they chose 'no special preference' only 36 per cent of the time compared to the 51 per cent of large agencies.

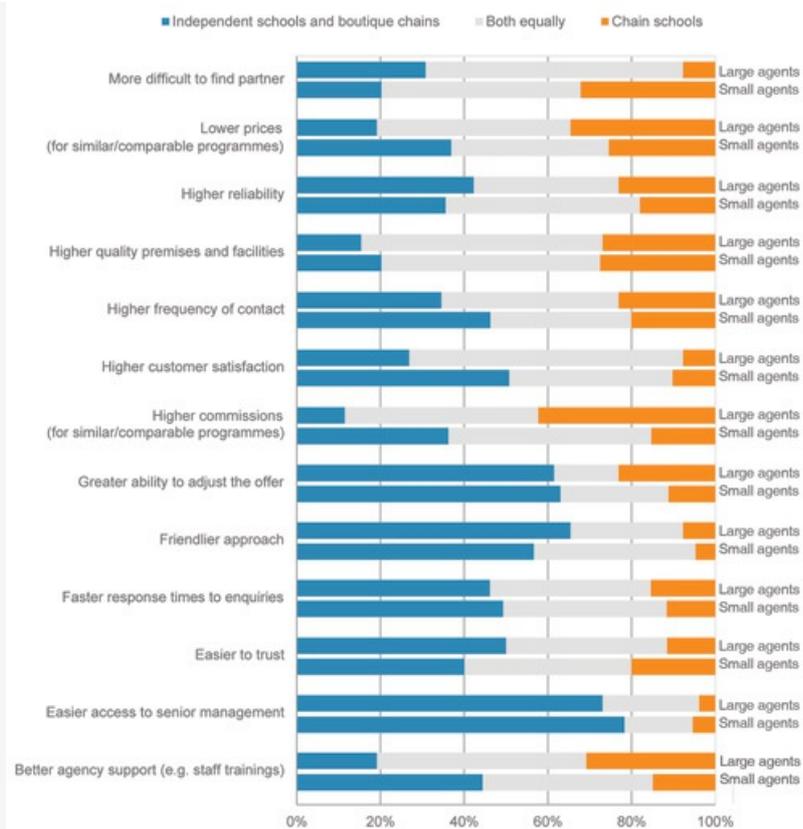


Figure 1: Descriptors chosen by large and small agents

Agents – in their own words

Some of the agents that participated in the Ialc research provided the *Gazette* with further insights into how indie schools and the chains score in the industry.

What was the most important positive factor associated with working with an independent school? One agent summarised this as being ease of communication on both the agent’s and the student’s side, along with the importance of personalised assistance and approachable staff. ‘We can tell them “Go and speak to John, he’ll take good care of you” instead of “Go and find the accommodation manager, whoever he/she is”’, said one agent.

Agents also pointed out that independent schools often have a unique atmosphere, where ‘the mission and love that pushed the founder don’t get lost in bureaucracy’, and that they ‘tend to be very rooted in the territory’, thus potentially offering students a more rounded cultural experience.

Agents underlined their own role as matchmakers, referring to their ability to know which type of school would be better suited to different types of client. They reported that chain schools usually employ better technology tools, offer loads of activities and a variety of other subjects in English, and that both independent schools and chain schools can be flexible and adapt to the clients’ needs. One agent also pointed out that the difference between independent schools and chain schools is often not that straightforward and is best evaluated on a case-by-case basis, as ‘sometimes an independent school is much bigger than a chain school’.

We also asked agents whether they think the dominance of the English language in the study travel world is in any way under threat. Thankfully, that is not the case – yet. ‘That’s the market, but it is not getting bigger,’ said one agent. The most popular languages after English are French, Spanish and German.