



International Association
of Language Centres

The student perspective on language study abroad:

Perfecting the student experience

IALC Study Travel Research Report 2018 – Administered by

studentmarketing
YOUTH TRAVEL CONSULTANCY



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THE STUDENT PERSPECTIVE ON LANGUAGE STUDY ABROAD: PERFECTING THE STUDENT EXPERIENCE

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Prepared on behalf of:



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INTRODUCTION

'Perfecting the Student Experience' is the second report in the latest series of research papers commissioned by the International Association of Language Centres (IALC) and concentrating on student perspectives on language study abroad. While the first report enumerated and quantified student preferences, experiences and, ultimately, satisfaction, this twin study predominantly documents the pre-arrival phase of the study abroad journey.

StudentMarketing, a global market intelligence firm and UNWTO Affiliate Member with individual memberships in ESOMAR World Research, was tasked to conduct a global survey of current and former IALC school students. The resulting reports draw conclusions from 4,755 international students across 136 countries.

The report first presents a detailed profile of students taking courses at IALC member centres in order to better understand their background, motivation and mindset when seeking language training opportunities abroad. Great attention was paid to analysing changes in the nature of students' needs, which helped identify possible shifts in the market in a number of areas, for instance the very purpose of learning a language abroad. This analysis was made possible by examining student data from as early as 2010 to the present.

As part of the research project, students also shared the rationale behind choosing their study destination and what information sources they relied on when assessing a language school, as well as what factors weighed most in the process of selecting a school. The study concludes its description of the pre-arrival student journey with an unprecedented analysis of how students book their language course and identifies correlations between the most commonly used booking platforms and student satisfaction.

Last but not least, the report summarises the results of qualitative research among students, who gave details of both positive and negative experiences during their stay abroad and voiced a number of suggestions to IALC schools.

The relevance of this initiative lies in its provision of another vital benchmark in the take-up of foreign languages. It not only delivers pertinent market intelligence to individual stakeholders such as schools and agencies (to better segment their customers according to age, language and destination preference, and thus deliver an improved student experience) but also contributes to the broader international education community.



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METHODOLOGY

This research is an outcome of a multilingual international research project conducted from September 2016 to August 2017. The foundation of this project lies in a global B2C survey aimed at current and former students at IALC member schools.

Whilst former students represented students who attended an IALC school in the past, current students were regarded as students who attended an IALC school at the time of this research (primary data collection from January to March 2017).

Overall, 4,755 respondents from 136 countries around the globe participated in an online survey. For increased clarity, the questionnaire was translated into the 9 major languages represented by IALC schools, thereby ensuring more accurate results. Respondents were provided with the possibility of submitting one of the following versions: Chinese, English, French, German, Italian, Japanese, Portuguese, Russian, and Spanish.

All research was conducted in compliance with the ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analytics and ESOMAR World Research Guidelines.

Note: Portuguese and Russian were excluded from benchmarking due to their low number of schools with IALC membership. The aggregation of data is to maintain confidentiality as on its own it may be attributable to a specific language centre.



EXECUTIVE SUMMARY

This study draws its conclusions from primary research conducted from January to March 2017 and provides a roadmap to students' decision-making, starting from the factors that stimulate their desire to learn a foreign language abroad to the booking of a course at an IALC member school.

To achieve the objective of measuring and quantifying the pre-arrival experience of students at IALC schools, the association commissioned StudentMarketing, a global market intelligence firm and a UNWTO Affiliate Member.

The report unveils age-, destination- and language-specific breakdowns, while providing an overarching insight into the entire IALC student base.

Among the key findings are:

The purpose of studying a language abroad is gradually shifting towards a more goal-oriented approach:

- Personal reasons (e.g. travel, fun, desire to learn) continue to prevail in the language travel landscape but language acquisition tied to academic goals is gradually increasing;
- Study-related purposes have already overtaken personal reasons within the junior age group, while employment reasons reach their peak within the 35-44 age band;
- Nowadays, fewer than 50% of students learn German, English and Chinese for personal reasons.

IALC schools also serve an experienced and educated customer base:

- A significant proportion of students (29%) have a track record of learning a foreign language abroad before enrolling at their IALC school;
- Of those who previously studied abroad, 63% learnt English, with non-English language providers more likely to attract older students;
- For almost 10% of students, an IALC school was the first instance of learning a foreign language in their life.

E-learning components show a minor uptake amongst students:

- 15% of students reported taking part in an e-learning component within their IALC school;
- The biggest potential for e-learning lies with 18-24 year olds;
- Generally speaking, the more 'serious' the background for studying a foreign language (further studies, immigration), the more likely a prospective student is to take on e-learning.

In contrast to school selection, students are more driven by their own preferences when choosing their study destination:

- The most widespread reason for students' choice was revealed to be the image of the destination itself – just over 25% of respondents were attracted by their study destination's image;
- For more than 16% of language learners, destination selection mirrors their future study or work plans;
- The top reason for choosing to study in China was alignment with future studies or professional career opportunities, while Italy and France most benefited from previous visits by students to these destinations.

Students access a plethora of information sources but, on average, rely on a combination of three platforms:

- The prime point of reference to which students turn for information on schools are school websites and third-party Internet portals;
- Education agents were third, but constituted the main source of information for junior students and the 18-24 age bracket, as well as English learners in general;
- Communication with a school representative was of greater importance to Chinese and Japanese language course takers, while students aiming to learn French or Spanish preferred utilising Internet portals over school websites.

The school selection process is fairly uniform across all languages and age bands:

- With the exception of English, where most students rely on the advice of an education agency, the majority of students choose their school based on their own Internet research;
- Internet searches, education agents, and friends were the three most influential resources for students to get acquainted with their future school; overall, the three channels were responsible for 60% of all matchmaking between students and schools;
- 19% of students were aware that they were booking a course at an IALC school, with 50% of students not knowing they were studying or had studied at an IALC institution until they completed the survey.

The use of booking channels has changed substantially over the past years:

- Direct enrolment is on the decline and now accounts for less than half of bookings (32% of students book remotely from their home country and 17% in-person at the school);
- Representing 26% of bookings, agents were the second most common method of booking a language course;
- While bookings through education agents and local education institutions continue to rise, the percentage of language courses booked through employers is declining.

Overall student feedback highlights the most prominent assets for students:

- By far the single most positive and enriching aspect of students' stay abroad was the teaching staff at IALC schools;
- On the other hand, if there were any negative experiences reported, they were chiefly related to issues with teachers;
- Similarly, while a majority of students did not have any suggestions for improvement, some said that changes in the structure and content of the course would boost the quality of their experience.

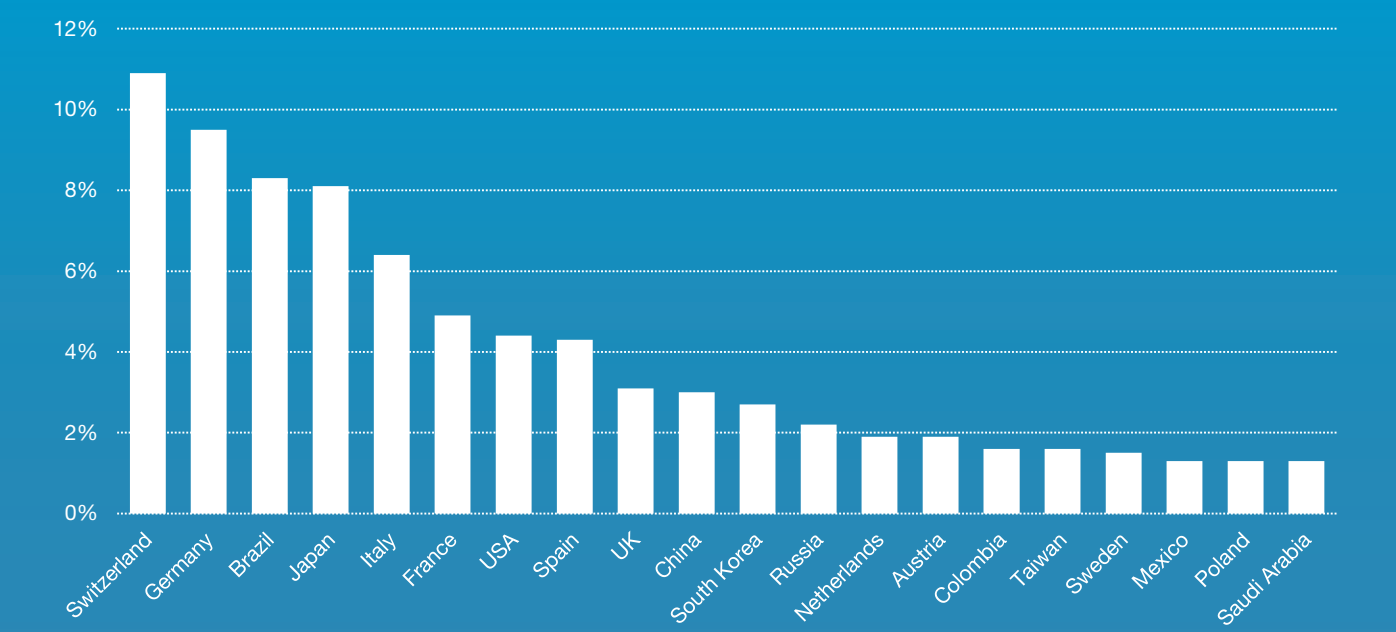


CHAPTER 1

RESPONDENT PROFILE

Below is an introduction to the profile of students at IALC schools who participated in the research. In total, 4,755 responses were collected.

TOP 20 COUNTRIES OF RESPONDENT ORIGIN



n=4,755

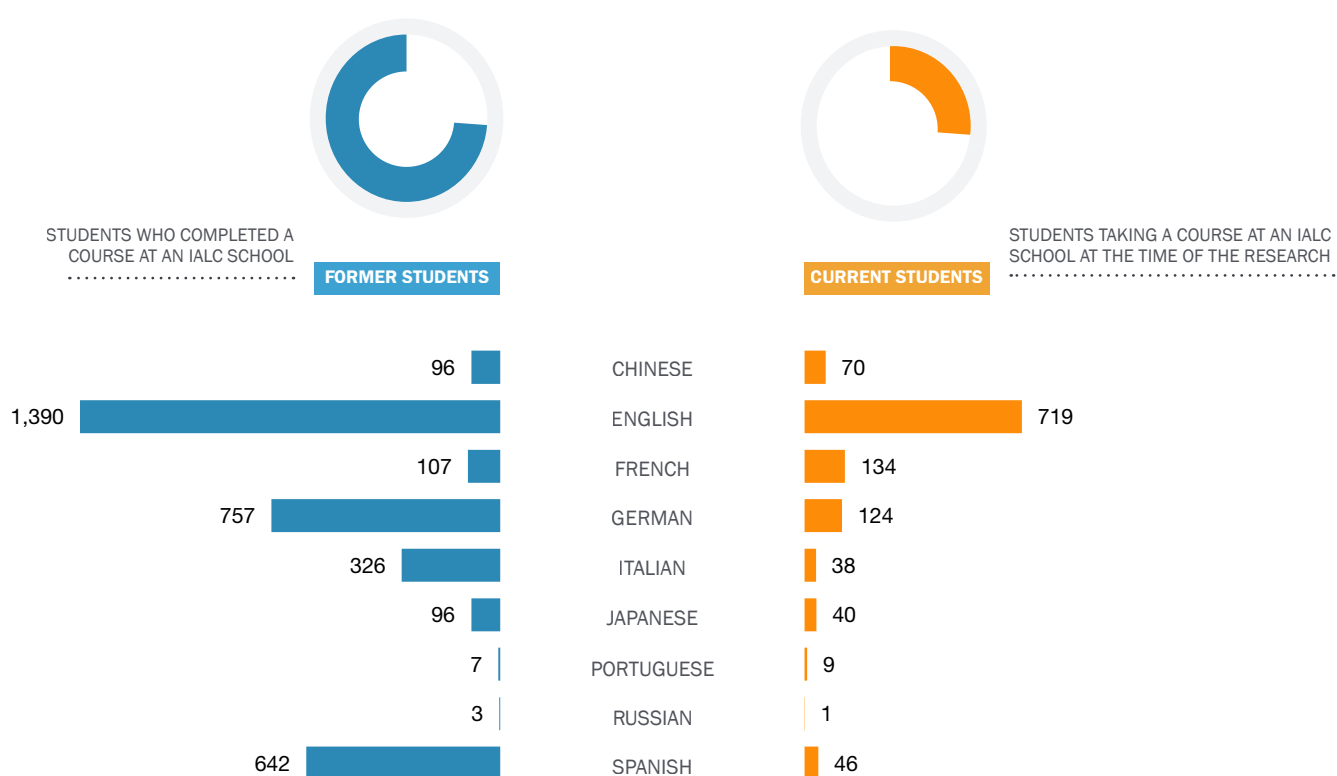
With 136 student nationalities taking part, the online survey was both geographically and broadly representative. This demonstrates the truly cosmopolitan blend of students at IALC schools.

As shown above, of all nationalities responding to the call to share their insights, the majority of responses came from Switzerland, Germany and Brazil. Furthermore, to a great extent

the composition of the top 20 countries of origin mirrors the list of top source countries globally.

The most populous region in terms of response rate was Western Europe (48%), followed by Asia (18%) and Latin America (14%). Eastern Europe comprised 8% of responses, while survey participants from North America accounted for 6%.

RESPONDENTS BY STATUS AND LANGUAGE STUDIED



n=4,605

To maximise the value of the research project, both current and former students of IALC schools were approached. The majority of former students studied at their IALC school in 2016 (57%) and 2015 (18%).

The research targeted all 9 languages taught by IALC member schools. The largest number of students were learning English (46%), followed by German (19%) and Spanish (15%).

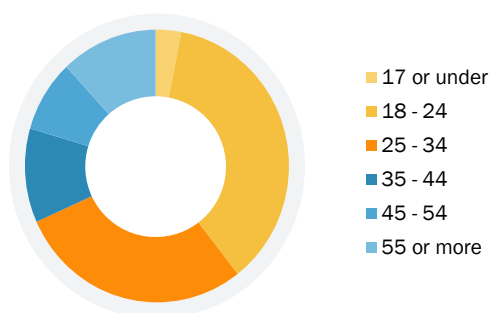
Due to the low number of IALC schools teaching Russian and Portuguese, only a handful of responses were gathered, and were not, therefore, analysed separately.

RESPONDENTS
BY DESTINATION OF LANGUAGE STUDY



n=4,755

RESPONDENTS BY AGE GROUP



n=4,755

The largest age segment participating in the research constituted students aged 18-24, who accounted for 37% of all respondents. So-called young professionals (25-34) were the next largest group with a share of 29%.

Coinciding with the data collection period, which took place between January and March, junior students (17 years old or younger) constituted the smallest age bracket – 3% of the research sample.

A considerable component of the research sample was the 55+ segment (12%), revealing that IALC schools effectively serve students of all ages.



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CHAPTER 2

WHY PEOPLE LEARN FOREIGN LANGUAGES ABROAD

Nowadays, students have access to a range of learning opportunities which was unheard of a decade ago. In-country tuition is on the rise and so is the multi-billion dollar online learning sector. In this rapidly digitalising and localising environment, learning a foreign language has evolved into a vehicle for achieving a goal higher than that of merely improving one's command of that language.

At a time when the market is becoming diluted by the use of platforms such as e-learning, it is critical to look at the profile of students who opt to undertake their studies in the native environment of a foreign country. By gaining a better understanding of their motivations and the shifts in primary drivers, schools and agents will be better equipped to serve this segment.

REASON TO LEARN A FOREIGN LANGUAGE ABROAD



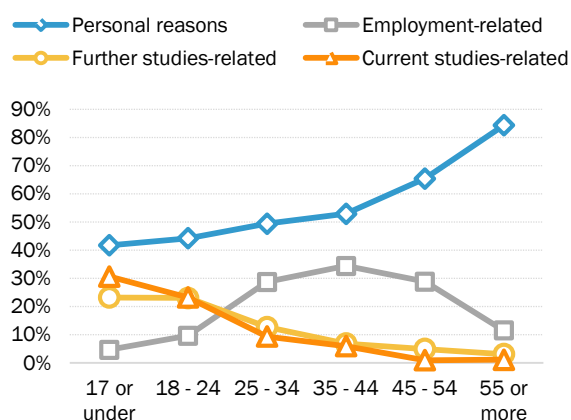
	Studying within 2012 or earlier	Studying within 2013-2014	Studying within 2015-2016	Difference
Purpose				
Personal reasons	60%	58%	58%	-2%
Employment-related	24%	21%	16%	-8%
Further studies-related	9%	12%	13%	+4%
Current studies-related	8%	9%	14%	+6%

n=3,764; percentages do not add up to 100% due to rounding

Although personal reasons remain predominant among those given for studying a foreign language abroad (on average, 53% of former and current students combined), trend data provided by former students in three different study periods suggest that the needs of students have started to shift.

Study-related reasons have been growing at the expense of employment-oriented purposes. This timespan data indicates that the desire to improve knowledge of a foreign language has become important at earlier stages of life. A growing proportion of students want to be more academically prepared for their current studies than they do for their future ones.

REASON TO LEARN A FOREIGN LANGUAGE ABROAD BY AGE



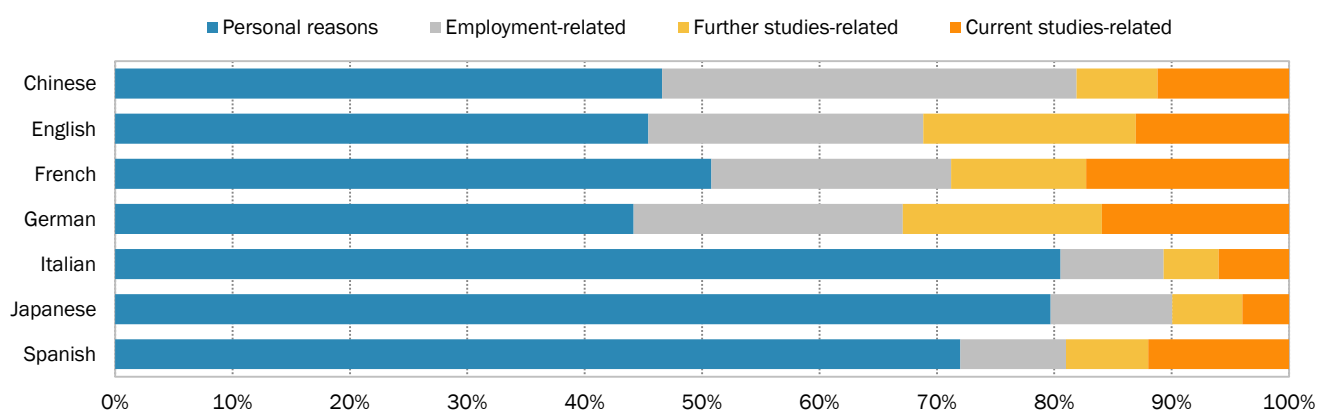
n=3,764

The trajectory of changes in the purpose of studying abroad considered by age group demonstrates how study-related reasons are overtaking personal reasons among the youngest students. Employment-related reasons reach their peak in the 35-44 age group.

As student age increases, however, the proportion of students learning the language for personal purposes also increases exponentially.

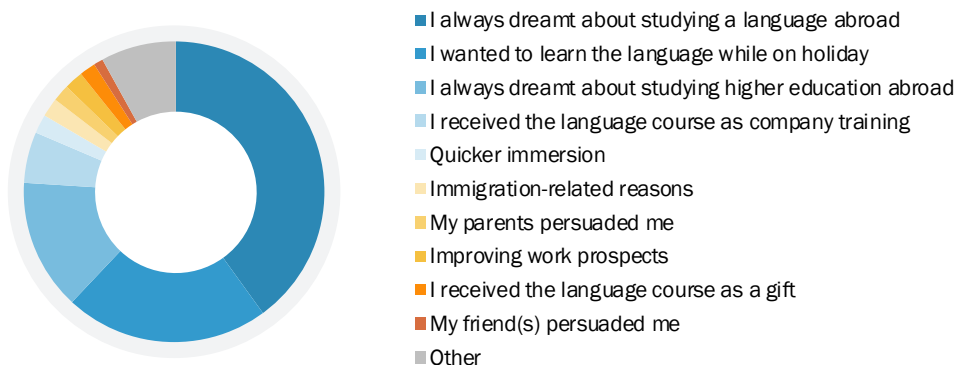
The study rationale can also be language-specific. Nowadays, fewer than 50% of students learning German, English and Chinese do so for personal reasons. A considerable proportion of students pursuing German and English courses are motivated by study-related reasons, while work-related reasons drive 35% of Chinese learners.

REASON TO LEARN A FOREIGN LANGUAGE ABROAD BY LANGUAGE



n=3,749

MOTIVATION TO LEARN A FOREIGN LANGUAGE ABROAD



n=3,760

Delving deeper into why people learn foreign languages abroad, this initiative also assessed the main drivers behind this phenomenon.

The present research shows that for 40% of students, learning a language was part of their lifestyle and had been a lifelong dream. This was chiefly the case for students learning English and Japanese. Two percent of students specified they sought immersion in the native environment, with the more pragmatic rationale that it would help them gain greater proficiency in a shorter timespan than learning in their home country.

For 14% of students, acquiring language skills was a means of achieving another life goal: studying at a higher education institution abroad.

One in five students enrolled at an IALC school because they wanted to spend some or all their vacation time learning a local language. This was especially true for the 45-54 and over-55 age brackets, with a clear preference towards learning Spanish or Italian.

Companies were the main driver for just over 5% of IALC students (those who received a language course as a company benefit). The most common characteristics of these students were that they were mostly people aged 35-44, learning Chinese in China.

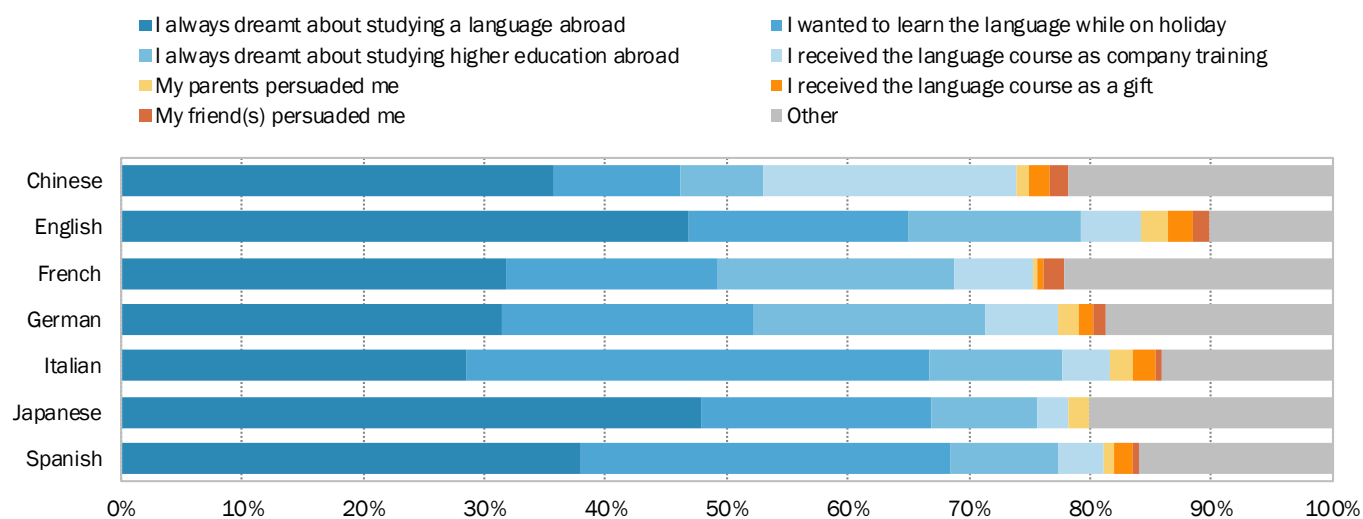
Four percent of people learning a foreign language at an IALC school were doing so because they needed to improve their employment prospects or their quality of life while living abroad.

Friends and parents played a negligible role in deciding whether or not a student wished to study a language abroad. In fact, the role of such influencers is practically non-existent where students aged 25 and more are concerned.

A tiny proportion of students go abroad for family and health reasons.

To summarise, it is noteworthy that in 85% of cases, the desire to study a language abroad represents a decision taken independently by an individual student.

MOTIVATION TO LEARN A FOREIGN LANGUAGE ABROAD BY LANGUAGE



n=3,744

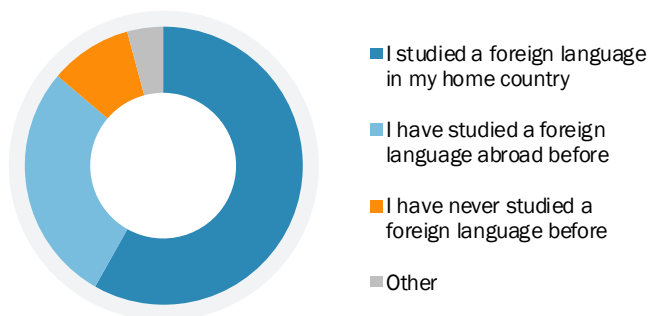
Breaking this down further, into individual languages, Italian and Spanish show a strong correlation with people on vacation.

A considerable proportion of people learning English, French and German connected their study to an aspiration to enter a higher education institution abroad.

WHY PEOPLE LEARN FOREIGN LANGUAGES ABROAD

Previous study abroad experience

HAVE YOU STUDIED A FOREIGN LANGUAGE BEFORE ENROLLING AT THE IALC SCHOOL?



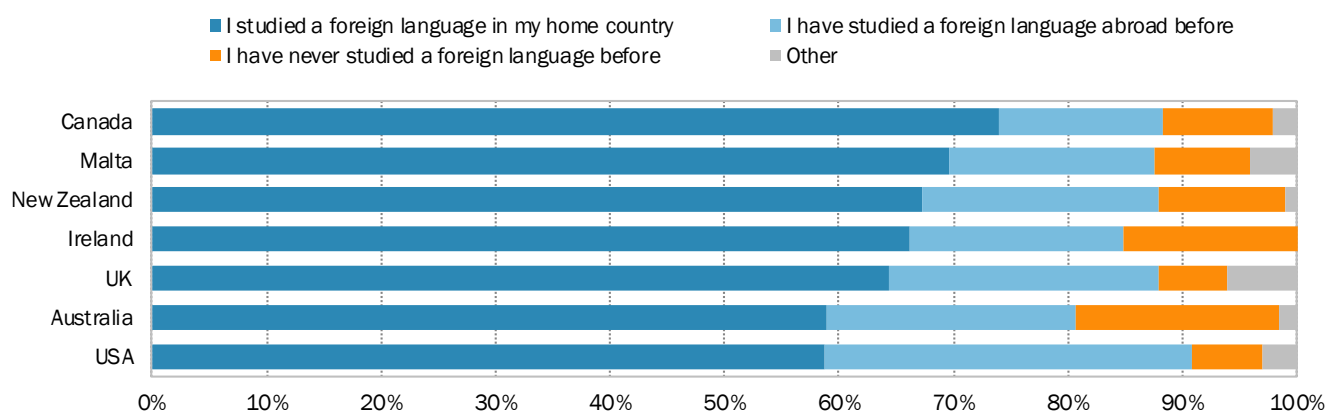
In most cases, studying at an IALC school serves as an upgrade to an already existing command of a foreign language. Eighty-six percent of students had studied at home and/or abroad before enrolling at an IALC school. Of these, 29% had also already had the experience of taking a language course abroad. For almost 10% of students, attending the IALC school was the only time in their life they had studied a foreign language.

n=3,819

Looking at English language destinations paints an interesting picture. It appears that the USA attracts the highest percentage of students with previous study abroad experience, and one third

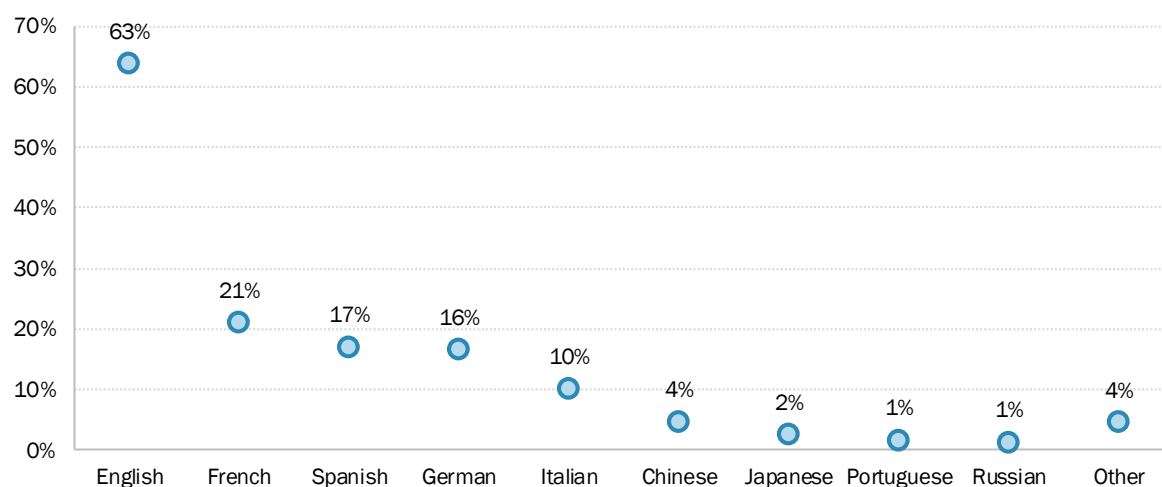
of students had taken a language course abroad before. On the other hand, the share of first-time language learners in Ireland and Australia was twice as high as the IALC average.

DESTINATION SPECIFICS



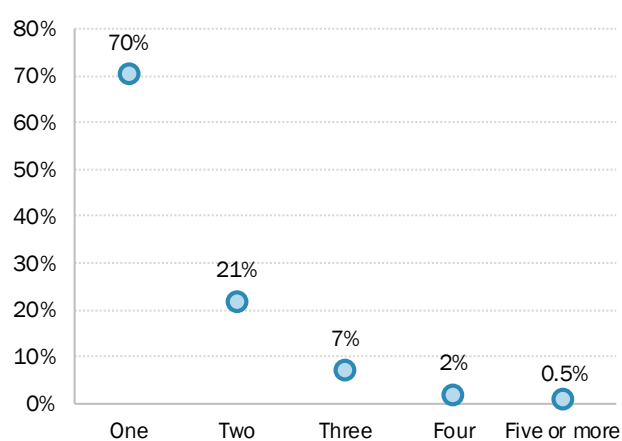
n=1,572

FOREIGN LANGUAGES STUDIED ABROAD PREVIOUSLY



n = 1,043; multiple answers possible

NUMBER OF FOREIGN LANGUAGES STUDIED ABROAD PREVIOUSLY



n = 1,030; percentages do not add up to 100% due to rounding

In terms of preferred languages, English dominated the list, accounting for 63% of all learners in this category. French came second, at 21%.

Also, the younger the students, the higher the penetration of English, usually at the expense of other languages. As students grow older, they tend to take courses in other languages, too. Therefore, non-English language providers are more likely to attract older students.

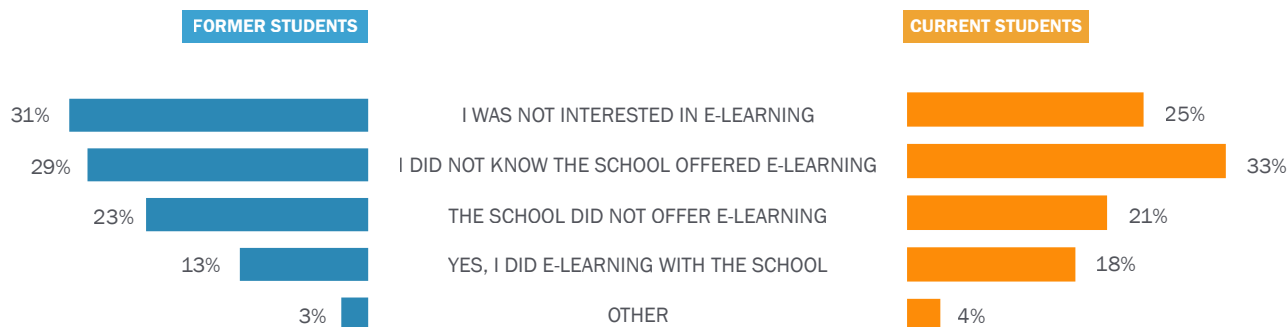
Furthermore, of these students, 30% have learnt at least two different languages in the past. The most common combination for those studying two and three languages was English and French; and English, French and German, respectively.



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WHY PEOPLE LEARN FOREIGN LANGUAGES ABROAD

E-learning

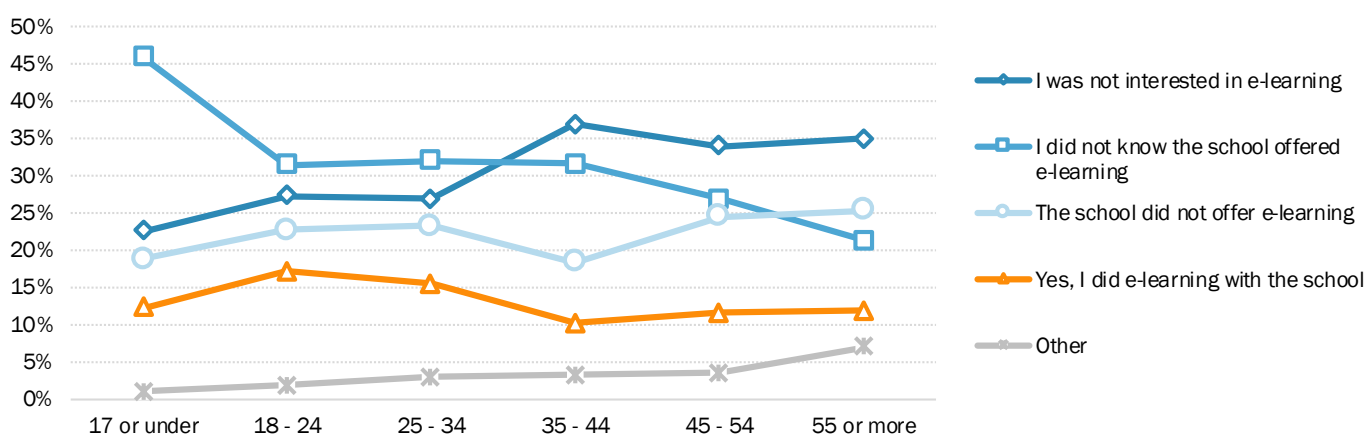
PREFERENCE TOWARDS
E-LEARNING

n=3,753; percentages do not add up to 100% due to rounding

The research also measured to what extent students used e-learning while studying at an IALC school. E-learning, as a preparatory phase before, or an extension of, a traditional course, was opted for by 13% of former and 18% of current students. It is not surprising that with the growing number of options available to students, former students were less likely to be interested in these programmes and the proportion of current

students taking part in e-learning programme components was higher.

The percentage of people interested in e-learning may increase in the future as the research unveiled that 29% of former and 33% of current students were not aware whether the school offered this type of tuition.

E-LEARNING
BY AGE

n=3,753

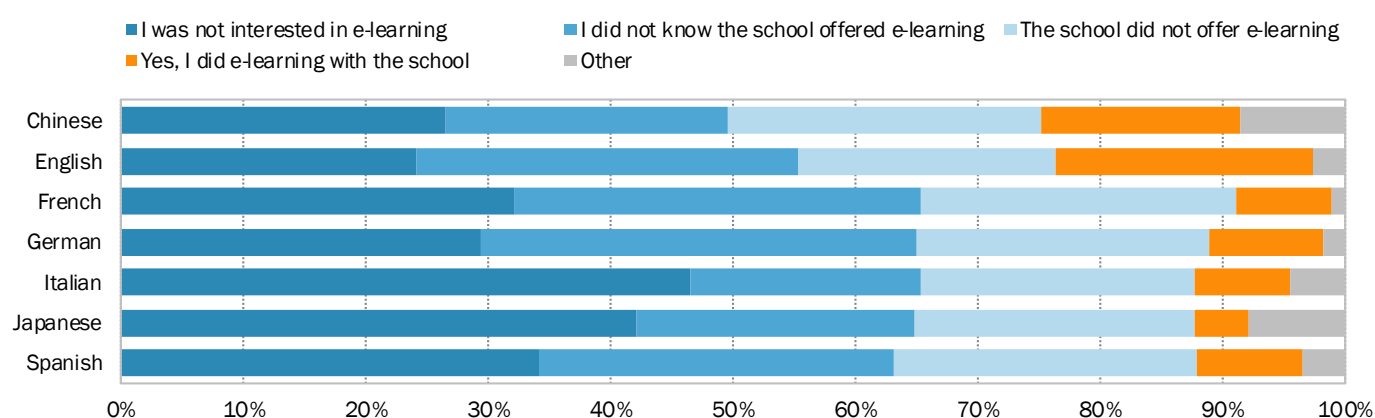
The biggest potential for e-learning lies with 18-24 year olds, 17% of whom opted for some sort of online learning as part of their language course.

A more detailed analysis also revealed that the preference for e-learning correlates with students' motivation. Generally speaking, the more 'serious' the background for studying a

foreign language (further studies, immigration), the more likely a prospective student is to take on e-learning.

The majority of students undertaking e-learning were studying English and Chinese. The proportion of students of other languages was below 10%.

E-LEARNING BY LANGUAGE

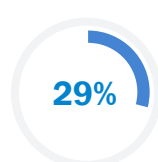


n=3,737

PERCENTAGE OF CURRENT STUDENTS WHO WERE MUCH MORE SATISFIED WITH THEIR SCHOOL THAN EXPECTED



YES,
I did e-learning
with the school



NO,
I did not do any
e-learning

While taking part in e-learning or not made no difference to the satisfaction levels of former students, current students attending online courses seemed to like their schools better than those without an e-learning experience.

Those taking part in online courses with the school were generally happier, with 36% saying that they were much more satisfied with their school than expected (compared to 29% of those who did not take part in any e-learning).

n=939

CHAPTER 3

FACTORS SHAPING DESTINATION AND SCHOOL SELECTION

Various factors and sources of information enter the process of selecting a destination and language school abroad. These not only differ by student age and purpose of study, but also by language preference.

This chapter outlines the students' journey, from selecting a destination through first learning about their future IALC school to the information sources they access. Finally, it also identifies the reasons for which students choose a particular school.

FACTORS DRIVING DESTINATION SELECTION



- Overall attractiveness of the destination
- I have visited the destination before
- It suits my career/study plans
- I have never been to this destination
- Recommended by a friend
- Recommended by an agency
- Chosen by my family
- Recommended by my family
- Other

n=3,762

It was revealed that the most widespread catalyst for students was the image of the destination itself. Just over 25% of respondents were drawn by their study destination's image.

Having made a previous visit to a destination positively influenced 17% of students, while 11% decided on their destination because they wanted to explore a new country on their 'to visit' list.

For more than 16% of language learners, destination selection coincided with their future study or work plans.








It has also become apparent that destination selection is largely determined by individual students. Recommendations from friends, parents and agents do not play an important role in this process; if the student needs to consider external factors, these tend to be chiefly work- or family-related.

Nonetheless, the implications for schools are that they should highlight their destination's unique selling points, with a specific focus on how language training blends with both the local environment and the student's motivation.

For instance, the highest percentages of students choosing their destination on the basis of the country's image went to New Zealand and Australia, closely followed by Japan.

Agency recommendations were most impactful in the case of English language learners. As another example, students reported opting for Ireland more frequently on the basis of agency recommendation rather than the overall attractiveness of the country. The top reason for choosing to study in China was alignment with future studies or professional career opportunities. Italy and France most benefited from previous visits by students to these destinations.

FACTORS DRIVING DESTINATION SELECTION BY LANGUAGE

	Overall attractiveness of the destination	I have visited the destination before	It suits my career/study plans	I have never been to this destination	Recommended by a friend	Recommended by an agency	Recommended/ chosen by my family
							
<i>Chinese</i>							
China	15%	11%	45%	5%	1%	1%	8%
<i>English</i>							
Australia	36%	14%	8%	10%	7%	6%	6%
Canada	21%	9%	8%	10%	14%	12%	15%
Ireland	13%	17%	15%	10%	8%	17%	9%
Malta	29%	21%	13%	8%	6%	13%	4%
New Zealand	37%	17%	7%	8%	7%	5%	11%
UK	21%	10%	12%	9%	13%	13%	9%
USA	21%	14%	11%	3%	15%	9%	13%
<i>French</i>							
France	23%	27%	20%	5%	8%	1%	5%
<i>German</i>							
Germany	19%	22%	29%	8%	4%	2%	5%
<i>Italy</i>							
Italy	28%	32%	7%	6%	7%	1%	4%
<i>Japanese</i>							
Japan	34%	25%	15%	6%	1%	1%	2%
<i>Spanish</i>							
Argentina	19%	25%	9%	28%	0%	0%	3%
Spain	31%	25%	11%	10%	3%	3%	3%

n=3,746; percentages do not add up to 100% due to rounding

FIRST ENCOUNTER WITH THE SCHOOL

	AVERAGE	17 OR UNDER	18–24	25–34	35–44	45–54	55 OR MORE
Own online search (e.g. Google, Bing, Yahoo, Baidu, Yandex)	23%	12%	20%	25%	28%	27%	23%
Local education agency	21%	21%	26%	26%	16%	9%	10%
Friend	16%	20%	14%	17%	19%	13%	18%
Advertisement on the Internet	13%	4%	10%	12%	16%	23%	19%
Relative	5%	14%	7%	3%	2%	3%	4%
School brochure	4%	15%	6%	2%	1%	2%	3%
Advertisement in print media (e.g. magazine)	3%	5%	3%	2%	2%	3%	7%
Online course listing/directory (e.g. www.languagelearningportal.com)	2%	0%	3%	2%	3%	4%	3%
Advertisement on social media (e.g. Facebook)	1%	1%	2%	1%	1%	1%	0%
Student fair	1%	1%	2%	2%	0%	1%	0%
Advertisement on TV	0%	1%	0%	0%	0%	1%	0%
Advertisement on radio	0%	0%	0%	0%	0%	0%	0%
Other	9%	8%	8%	8%	12%	13%	12%

n=3,727; percentages do not add up to 100% due to rounding

MAX value

In general, it was reconfirmed that Internet search, local education agents and friends were the three most influential resources for students to get acquainted with their future school. Overall, these three channels were responsible for 60% of all matchmaking between students and schools.

The research, however, discovered opposing patterns between people younger than 35 years old and those older. Students in the first group tend to first meet their future language school through personal interactions with agencies, friends and relatives, whilst their older counterparts rely on the online world (search engines, advertisements).

The fact that agencies were the top source for 24 and 25-34 year olds getting to know an IALC school shows that one in four prospective students approach an agent at the outset of their study abroad planning phase.

Friends and relatives represent another powerful source for students to learn about IALC schools. That, in turn, indicates that

IALC schools benefit from referral business to a considerable extent.

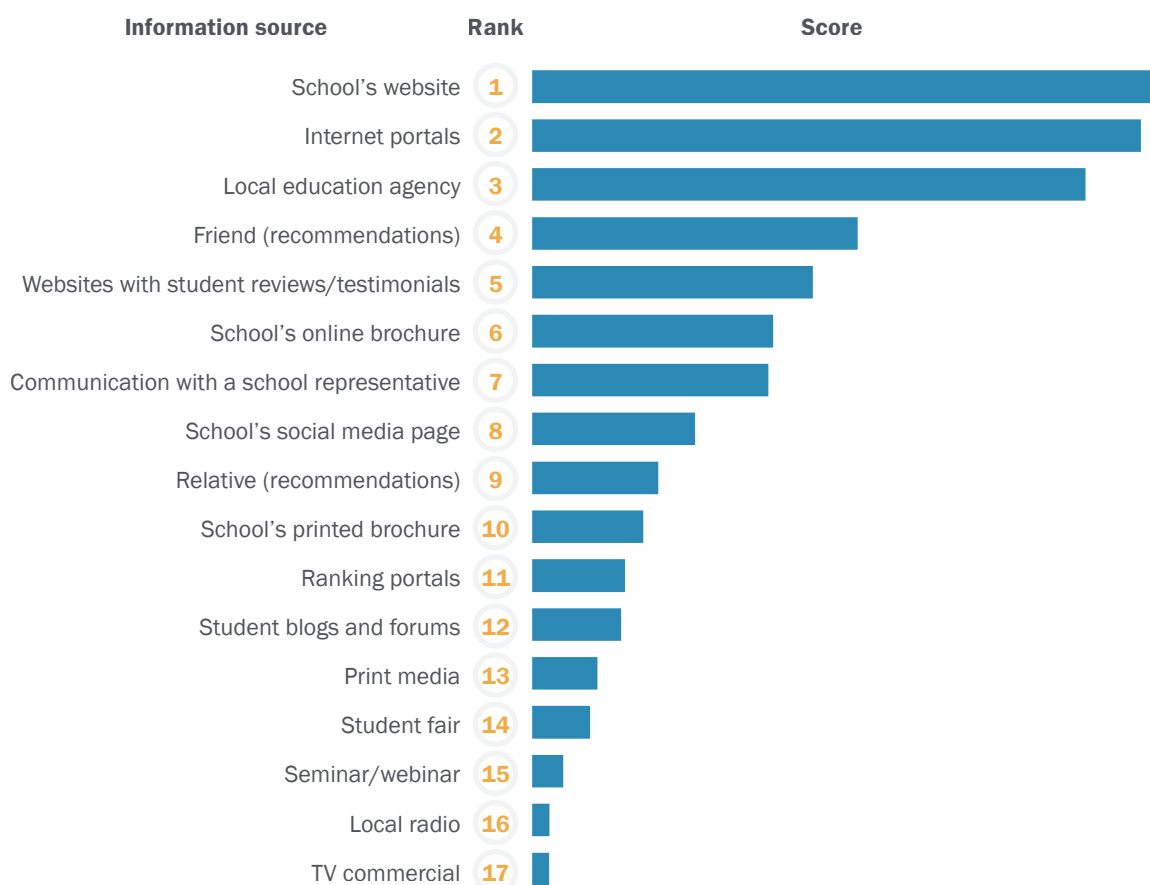
Interestingly enough, school brochures are also an important source for juniors (below 18); however, their importance diminishes rapidly among adult students.

Alongside increasing age, the percentage of students learning about their school through an online search grows, and reaches its peak, in the 35-44 age band. In addition to relying on their own active online search, students aged 35+ are more prone to looking at advertisements on the Internet, which justifies the use of this marketing channel when recruiting students from this cohort.

On the other hand, print and social media advertising are responsible for an average of 3% and 1%, respectively, of students of all ages.

Other options for students to identify their future school include company and education institutions in their home country.

INFORMATION SOURCES ACCESSED BY STUDENTS ACCORDING TO THEIR IMPORTANCE



n=3,409

The digital world, offering the most convenient way of screening and comparing language schools, dominates the array of tools which students use to gather information on schools. As such, it is imperative for schools not only to have their own properly developed website but to be able to showcase positive content on third-party websites, which are the second most influential resource.

Education agents took the third spot overall but constituted the main source of information for junior students and the 18-24 age

bracket, as well as English learners in general. Communication with a school representative was of greater importance to Chinese and Japanese language course takers, ranking third, while students aiming to learn French or Spanish preferred utilising Internet portals over school websites as the primary resource.

Unlike in higher education, the lack of ranking portals and student blogs in the sector makes these a less relevant source for students. Instead, students rely on previous students' testimonials.



REASONS FOR CHOOSING A SCHOOL



n=3,748; multiple answers possible

When it comes to reasons for selecting a particular school, students predominantly base their judgement on information they have gathered themselves.

Twenty-eight percent of students accept the advice of education agents in this process. As concerns the English language, more students admitted that they relied on agency recommendation and not necessarily on the results of their own online research.

Reputation (the school being known for its quality) comes before academic offering and image, although - as can be seen on the next page - this varies from language to language. For instance, Chinese and French language learners place more emphasis on the image than the perceived quality of the institution or course portfolio.

Seventeen percent of students are also influenced by recommendations from friends and/or relatives, which is another indication of strong referral business from which IALC schools benefit. At the same time, it constitutes an impetus to work with alumni and leverage their power when recruiting prospective students.

It is also noteworthy that responses from former and current students were mostly aligned, with the exception of use of agents: current students used agents more often than former students when choosing a language school (38% v 24%).

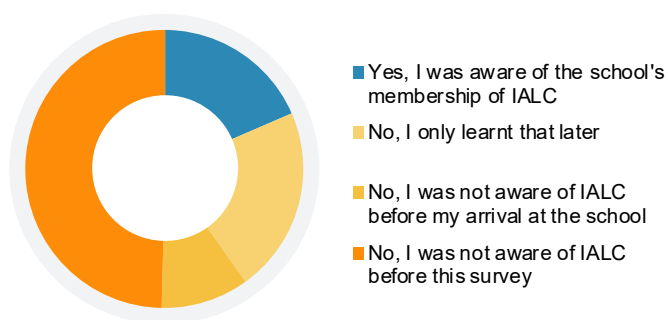
Current students seem to be slightly more driven by the IALC brand than former students (5% vs 3%), which possibly points to improved branding and marketing activities by the association and individual schools over the measured period.

REASONS FOR CHOOSING A SCHOOL BY LANGUAGE

	CHINESE	ENGLISH	FRENCH	GERMAN	ITALIAN	JAPANESE	SPANISH
Academic package offer	15%	20%	15%	24%	16%	25%	22%
Best option based on my own research	45%	38%	53%	48%	46%	75%	51%
IALC brand	3%	4%	4%	2%	1%	7%	4%
Recommended by a former student (positive testimonial)	5%	8%	12%	11%	14%	15%	9%
Recommended by a friend	14%	14%	12%	17%	14%	12%	11%
Recommended by a relative	3%	6%	4%	6%	4%	2%	3%
Recommended by an agency	4%	44%	13%	14%	8%	10%	19%
Recommended by a company	12%	2%	6%	2%	0%	2%	2%
Recommended by my local school/college/university	3%	4%	5%	6%	4%	1%	8%
Student ratings	6%	10%	8%	9%	7%	22%	11%
The look/image	16%	16%	16%	17%	15%	23%	21%
The school is highly ranked	9%	12%	8%	14%	6%	30%	17%
The school is known for its quality	15%	23%	13%	21%	13%	38%	24%
Other	9%	6%	10%	10%	18%	14%	10%
				TOP 1	TOP 2	TOP 3	

n=3,733; multiple answers possible

WERE YOU AWARE THAT THE SCHOOL WAS AN IALC MEMBER WHEN BOOKING THE COURSE?



n=3,438

The research also established that 19% of students were aware that the school at which they were booking a language course was a member of IALC. Students mostly found that out through the school website (40% of students); however, 20% were told by an agency.

A further 22% of students learnt about IALC between booking the course and arriving at the school, and 10% did so after commencing their language course. With regard to the above, the research initiative also served as a branding exercise: 50% of students became aware of IALC while completing the survey.

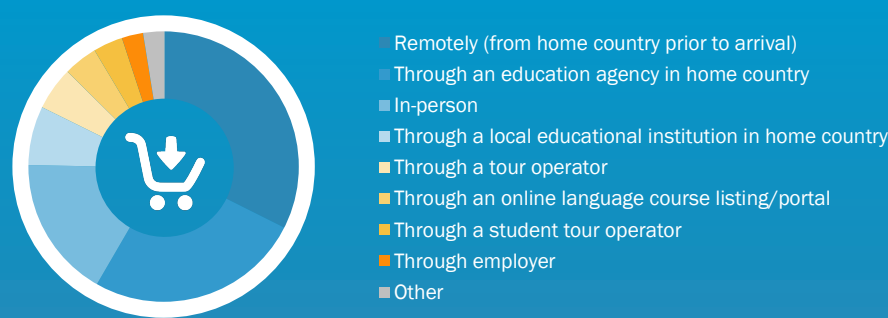
CHAPTER 4

COURSE BOOKING SPECIFICS

This chapter details how students ultimately book their language course, with a specific focus on breaking the data down into particular languages and age bands.

It also identifies and measures practices that might lie under the surface of this process (e.g. use of agents by those enrolling directly).

PERCENTAGE OF STUDENTS BY BOOKING SOURCE UTILISED



	Studying within 2012 or earlier	Studying within 2013-2014	Studying within 2015-2016	Difference
Booking channel				
Remotely (from home country)	39%	40%	34%	-5%
Through an education agency	13%	16%	23%	+6%
In-person	17%	18%	15%	-2%
Through a local educational institution	4%	6%	7%	+3%
Through employer	7%	3%	2%	-5%

n= 3,480

Direct bookings remain the most common type of booking. On average, 32% of students book remotely from their home country prior to arrival, although their share has been diminishing in the last few years.

Trend data analysis pointed to a growing use of education agents (based on historical data from former students and

recent data from current students). At the same time, fewer students booked their language course through their employer.

IALC schools also register a relatively high number of in-person bookings (i.e. walk-ins). This can be attributed to the fact that a huge proportion of these students are already in the destination country (temporary workers or expats).

USE OF BOOKING CHANNELS BY LANGUAGE

	CHINESE	ENGLISH	FRENCH	GERMAN	ITALIAN	JAPANESE	SPANISH
Remotely (from home country prior to arrival)	33%	17%	47%	45%	48%	62%	41%
Through an education agency in home country	5%	42%	6%	11%	6%	8%	13%
In-person	39%	13%	30%	21%	23%	12%	13%
Through a local educational institution in home country	2%	8%	2%	7%	5%	1%	8%
Through a tour operator	0%	6%	2%	1%	9%	4%	8%
Through an online language course listing/portal	4%	2%	5%	6%	4%	7%	7%
Through a student tour operator	0%	5%	1%	2%	1%	1%	4%
Through employer	14%	3%	3%	2%	0%	1%	2%
Other	5%	5%	6%	5%	5%	5%	5%

MAX value

n=3,464; percentages do not add up to 100% due to rounding

USE OF BOOKING CHANNELS BY AGE

	17 OR UNDER	18-24	25-34	35-44	45-54	55 OR MORE
Remotely (from home country prior to arrival)	23%	28%	30%	36%	38%	44%
Through an education agency in home country	19%	32%	30%	15%	14%	8%
In-person	14%	13%	18%	21%	17%	20%
Through a local educational institution in home country	26%	9%	5%	4%	5%	6%
Through a tour operator	4%	4%	4%	5%	8%	7%
Through an online language course listing/portal	4%	3%	4%	4%	4%	7%
Through a student tour operator	3%	4%	3%	3%	4%	1%
Through employer	2%	1%	2%	5%	4%	2%
Other	4%	5%	4%	8%	6%	5%

MAX value

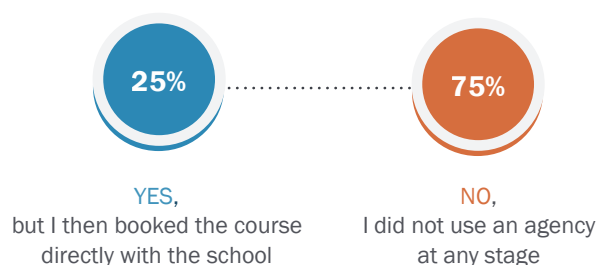
n= 3,480; percentages do not add up to 100% due to rounding



COURSE BOOKING SPECIFICS

Agency-related specifics

EVEN THOUGH YOU DID NOT BOOK THROUGH AN AGENCY, DID YOU USE THEIR SERVICES?

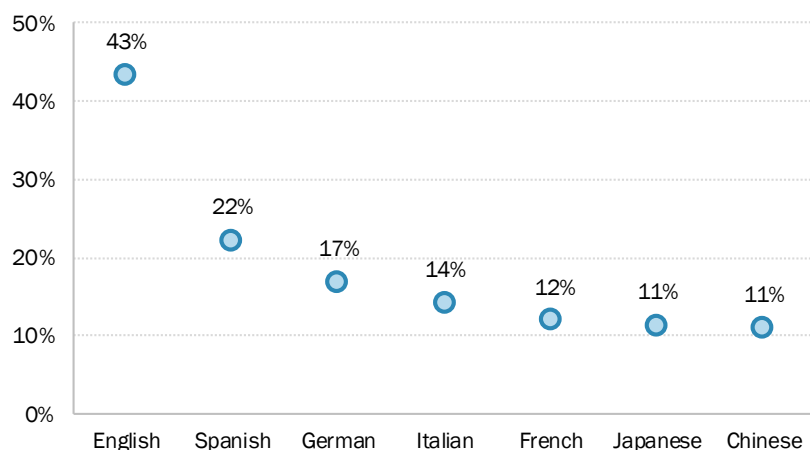


n=2,354

Agencies play an important role, even for those who do not book a course through them. In fact, every fourth student uses an education agency at some point, even if ultimately enrolling via another channel, predominantly directly (remotely, as well as in-person at the school) or through educational institutions in the home country.

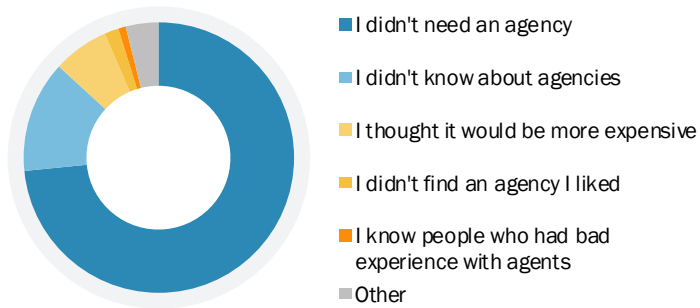
As shown below, the practice of using agencies is most widespread in English language travel. As revealed in the IALC Study Travel Research Report 2015, English was the most promoted language by agents, and therefore students have an opportunity to consult with a broader pool of agents than is the case with other languages.

SHARE OF STUDENTS USING AGENCY SERVICES BUT NOT BOOKING THROUGH AN AGENCY BY LANGUAGE



n=2,341

REASONS FOR NOT USING AN AGENCY

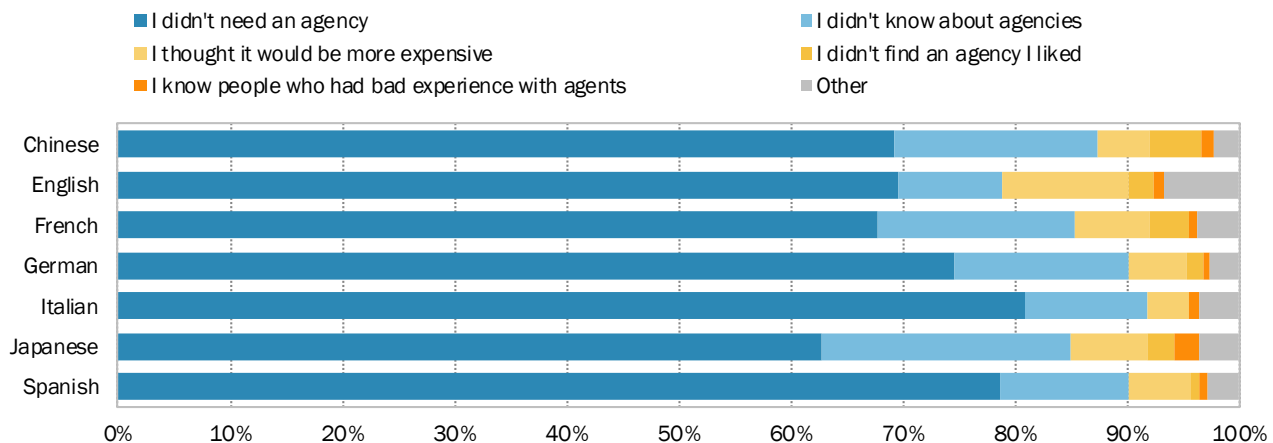


Whether or not students opt for using an education agency does not seem to be an issue of trust. The vast majority of students not using the services of education agents reasoned they were simply independent enough to select and apply to their IALC school. Seven percent believed it would make it a more expensive exercise if they went through an agency.

More importantly, the research revealed that students who applied through agencies showed lower levels of satisfaction than those enrolling directly (28% of agency customers said they were much more satisfied than expected compared to 32% of those booking remotely from home country).

n=1,730

REASONS FOR NOT USING AN AGENCY BY LANGUAGE



n=1,722

CHAPTER 5

STUDENT FEEDBACK

The previously released 2017 IALC Study Travel Research Report analysed student experiences and student satisfaction in great detail. To complete the picture, the present research

also sought qualitative data. Students provided feedback in terms of what kinds of positive and negative experiences they encountered at their IALC school.

POSITIVE EXPERIENCE



TEACHERS



MAKING NEW FRIENDS, PEOPLE IN GENERAL



CULTURE SHARING AMONG INTERNATIONAL STUDENTS



STAFF AND MANAGEMENT



TRIPS AND ACTIVITIES IN FREE TIME



ATMOSPHERE AND ENVIRONMENT



SUPPORT, PATIENCE AND FRIENDLINESS OF TEACHERS AND STAFF



LOCATION



DESIRED PROGRESS IN LANGUAGE LEARNING



FACILITIES AND EQUIPMENT PROVIDED BY THE SCHOOL



SMALL CLASSES



ACCOMMODATION



PRACTICAL EXPERIENCE WITH LANGUAGE (INTERACTION, SPEAKING)

NEGATIVE EXPERIENCE



NO NEGATIVE EXPERIENCE



ISSUES WITH TEACHERS



PROBLEMS RELATED TO STRUCTURE OF COURSE



MIXTURE OF NATIONALITIES



ACCOMMODATION



MORE SOCIAL ACTIVITIES



ADMINISTRATIVE HURDLES



CAPACITY PROBLEMS



PROBLEM WITH TEACHING MATERIALS



TECHNOLOGICAL DIFFICULTIES



TOO BIG AGE DIFFERENCES



TOO EXPENSIVE



STEREOTYPE

SUGGESTIONS FOR IMPROVEMENTS

● NO FURTHER SUGGESTIONS/SATISFIED WITH EVERYTHING

● CHANGE THE CONTENT AND STRUCTURE OF CLASSES IN COURSE

● ADD EXTRA-CURRICULUM ACTIVITIES

● IMPROVE ACCOMMODATION

● APPLY NEW TECHNOLOGIES

● BALANCE THE CLASS (GROUP SIZE AND AGE COMPOSITION)

● IMPROVE NATIONALITY MIX

● ADD LEARNING OPPORTUNITIES OUTSIDE THE CLASS

● PLACE EMPHASIS ON QUALITY SELECTION OF TEACHERS

● FOCUS MORE ON SPEAKING EXERCISES (LESS GRAMMAR)

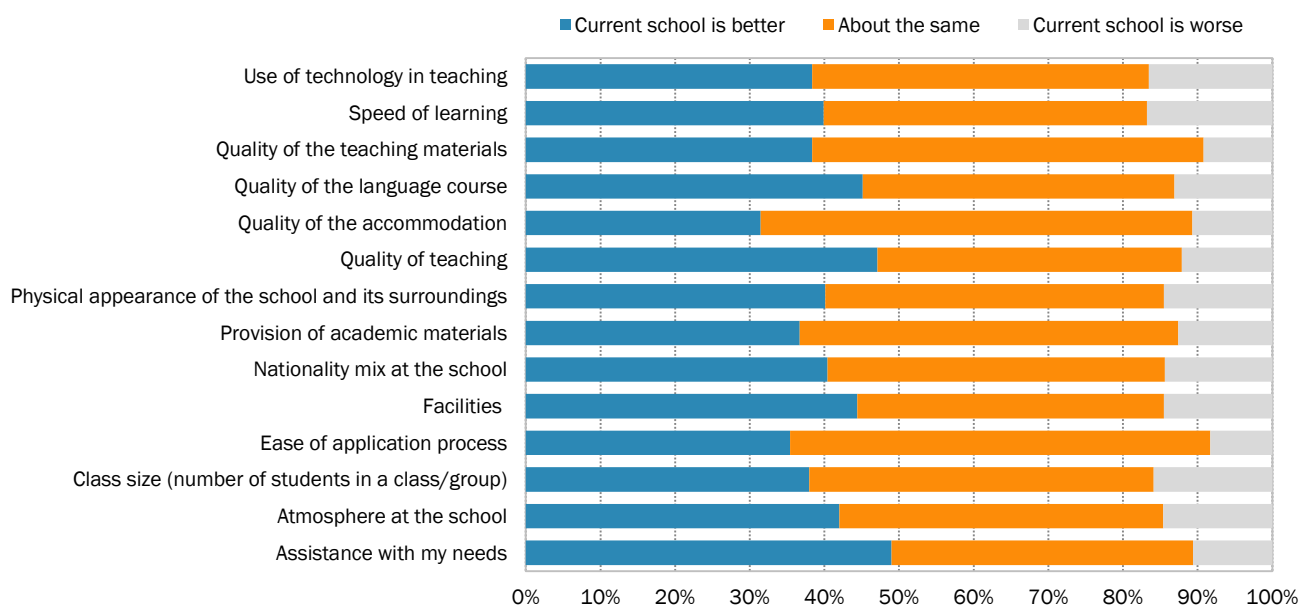
● PROVIDE A BETTER PLACEMENT TEST FOR STUDENTS

● USE VARIOUS MARKETING TECHNIQUES

● ASK FOR AND IMPLEMENT STUDENT FEEDBACK



EXPERIENCE WITH PREVIOUS SCHOOL



n=208

Finally, students were asked to give feedback and compare their experience at previous schools with that at their IALC school. Although the sample size for the questions was quite low and therefore has limited application, it is still noteworthy that students mostly praised assistance with their needs, quality of teachers and the quality of the language course itself. To give the above benchmark some background, the research also

queried whether the school they had previously attended was an IALC member or not. Although the sample was limited to 191 respondents, 15% of these indicated that the school to which they compared their IALC school was also an IALC member, while 30% were positive that the previous school was not IALC affiliated. Nonetheless, this data suggests there is a considerable proportion of multiple-times learners among the IALC community.

WAS THE OTHER SCHOOL AN IALC MEMBER?



n=191



CONCLUSIONS

Among the overarching learning outcomes of this initiative, the fact stands out that student satisfaction with a school and language course is already shaped in the pre-arrival stage. Noticeable variations in fulfilling students' expectations were also revealed to be determined by the type of information sources and booking channels utilised. By outlining a range of breakdowns, the report assists IALC member schools in formulating bespoke strategies per language, destination and target audience.

The results prompt language centres to take a more active role in information provision. On average, students access three to four information sources; however, as many as 21% rely on one source only. Schools can empower their presence via a number of techniques, such as paying more attention to information dissemination on the Internet, actively involving former students in their marketing and recruitment activities, and educating and supporting their partners, such as local agents and educational institutions.

Furthermore, schools and agents alike need to take note of the changing landscape. While the motivation for learning Spanish, Italian and Japanese continues to be tied to personal reasons, English, German and Chinese are increasingly undertaken for further studies and reasons to do with employment. The decreasing number of language students learning these languages for personal reasons is well in line with increasing in-country provision and uptake in online learning. One of the most probable impacts on the industry is that language courses abroad are likely to become more specialised, individualised and experience-based. There is going to be more pressure to tie the course portfolio to local destination specifics, deepen the cultural aspect and showcase the speed with which students learn in a native environment. Language centres capable of adjusting to these evolving customer needs will be early beneficiaries of the change.

In order to assist stakeholders in this process, the study helped establish the IALC school customer. It identified students as pragmatic, educated individuals, a large proportion of whom have already had a study abroad experience of some sort before applying to an IALC school. These students have certain expectations and are able to make comparisons. In this context, it is essential to acknowledge the top strengths identified by them (quality of teachers at IALC schools and assistance with students' needs) and, at the same time, embrace areas for improvement (possible changes in the course structure and content) and work towards raising the bar.

The report stresses how providing a quality experience benefits schools in return. Quantifying the size of repeated business (at least 15% of respondents studied at an IALC school in the past, as the very bottom line) highlights the importance for schools to have proper alumni marketing – something that works in the higher education sector quite well, but remains to be properly developed in language training. Language centres aspiring to be in the business for the long term will learn how to establish, maintain and leverage brand ambassadors, alumni networks and other referral channels. This will be especially important for smaller, specialised schools with limited marketing budgets.

Internally, establishing a school-wide consensus about institutional goals – aligning the daily work of teachers with the strategic priorities of the management – will play a key role going forward.

Ultimately, this report also benefits the IALC community. Half the students were unaware that their school was a member of the association until this research project. Surveying former and current students therefore also served as a branding exercise, which identified a need for additional marketing activities aimed at building further awareness of the association.



International Association
of Language Centres



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