



International Association
of Language Centres

The student perspective on language study abroad:

Student expectations, experiences and satisfaction

IALC Study Travel Research Report 2017 – Administered by

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THE STUDENT PERSPECTIVE ON LANGUAGE STUDY ABROAD: STUDENT EXPECTATIONS, EXPERIENCES AND SATISFACTION

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International Association
of Language Centres

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INTRODUCTION

The acquisition of language skills abroad has become a vital part of the learning process in an increasingly globalised world. Nowadays, more than 3,000 schools teaching foreign languages to international students around the world compete to provide the best student experience.

In this context, the International Association of Language Centres (IALC), an umbrella organisation that comprises 140 accredited year-round and summer centres representing 9 different languages, embarked on a mission to map the experience of students at its member schools. Building on their previous study travel research reports from 2015 and 2016, the association commissioned StudentMarketing, an independent market intelligence specialist and a UNWTO Affiliate Member and ESOMAR individual member, to design and conduct research on its current and former students.

With 4,755 responses from international students spanning 136 countries, the research delivers a comprehensive insight into the specifics of learning a foreign language in a native environment. This resulting study effectively outlines the entire student journey, starting from the evolution of initial expectations through the actual experience with an IALC school, to measuring and quantifying satisfaction levels among students. The power of the study is in its barometer status for 9 languages through the introduction of specific breakdowns by destination, student type, and age band.

One of the key learning objectives of this initiative was to detail how students' expectations are shaped and to what extent fulfilled, including an analysis of the main influencers — sources of information utilised by students in their search for a language school abroad.

A considerable part was devoted to students' own assessment of their experience of a range of aspects such as the quality of their language course, teaching staff and their academic progress at the end of the course in various fields including reading, writing, listening comprehension, and speaking. The data provides a unique overview of how academic progress correlates with course duration. Surveying former and current students enables schools, agencies, and other industry stakeholders, to gain a better understanding of their customer base, identify needs, and areas for possible improvements.

Last but not least, the research also elaborates on student satisfaction as the ultimate statement of the student experience.

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 delivers an unprecedented analysis of what language students expect from a study abroad experience and their overall levels of satisfaction.

To achieve the objective of measuring and quantifying the experience and satisfaction of students at IALC schools, the association commissioned StudentMarketing, a market research and industry strategist firm and UNWTO Affiliate Member.

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

Among the key findings are:

Student expectations are shaped by three main information sources:

- School website (32% of students), local education agents (26%) and a friend or relative (20%) are essentially the only main sources of information on a particular school a student receives;
- For older students, the use of agencies as the primary source of information is replaced by school website;
- School website dominates as the main source of information for all languages except for English, where education agents prevail.

Information provided to students generally reaches high accuracy levels, yet varies by information source:

- Almost 95% of respondents claimed that course price and additional fees were reliable, validating a high level of financial transparency;
- Students also positively assessed school-related factors — its location, physical appearance, and accreditation;
- 12% of students said information on the use of technology in the teaching process was mostly inaccurate.

The vast majority of students were content after arriving at their school:

- On average, 30% of respondents said their expectations were exceeded, with a further 45% of students acknowledging their expectations were met;
- Academic- and cultural immersion-related factors scored very highly: school atmosphere, experiencing another culture, and teaching were the top three factors exceeding students' expectations;
- If the research intimated any opportunities for possible improvement, these were largely tied to out-of-class activities.

Teaching-related aspects offer the best student experience:

- Of all screened factors, students had the highest hopes for the quality of the language course — and it also scored the highest after students completed their course;
- However, students were most positively surprised by the quality of teaching staff at IALC schools;
- Overall, English and Japanese language learners claimed having the best experience during their stay abroad.

Self-assessment of academic progress reveals where the most development take place:

- Generally speaking, students reported between making slightly more progress and much more progress than they anticipated;
- Language learning abroad mostly fosters listening comprehension and spoken fluency, on the other side of the spectrum was writing skills;
- In addition to academic progress advancing with the amount of time spent learning a foreign language abroad, longer stays also lead to more balanced student development.

Fulfilling students' expectations leads to high satisfaction levels:

- 47% of all former students reported greater satisfaction than expected with their IALC school;
- 88% of students would opt for the same language course again;
- 94% of responding students would recommend the school to a friend;

Students are very satisfied with their school and destination selection, however, accommodation lags behind:

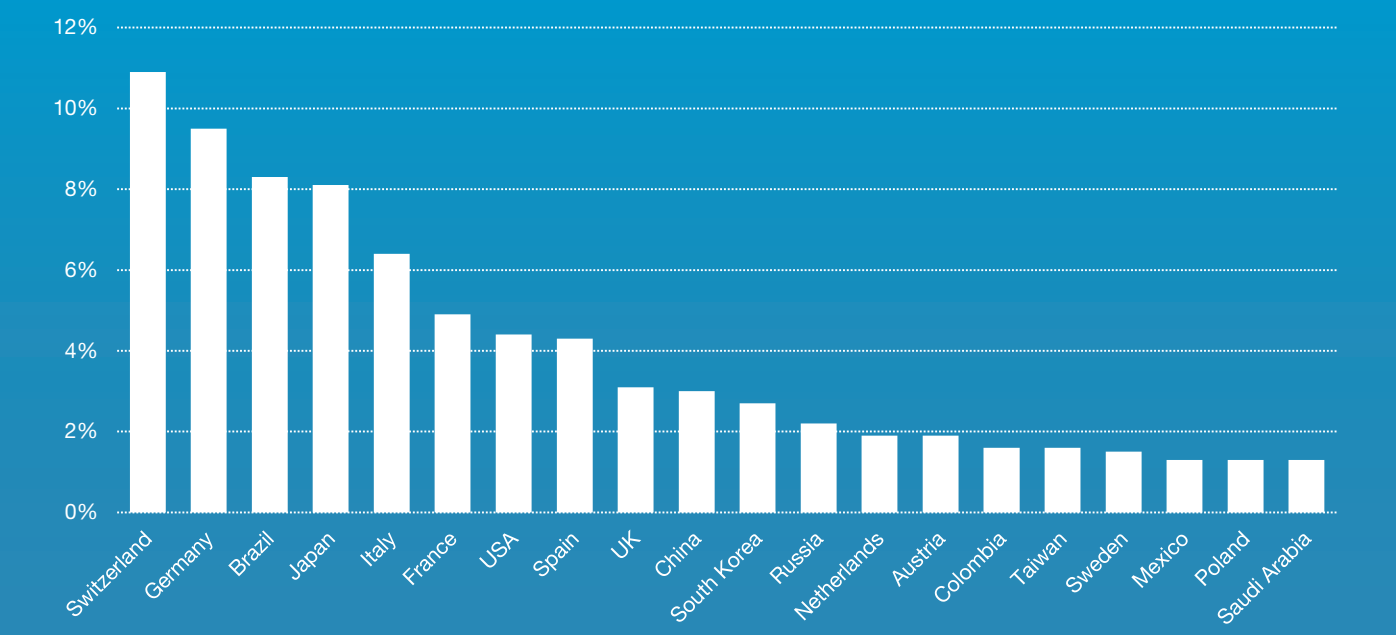
- The highest course quality was reported by English language learners in Ireland, which also demonstrated the biggest improvement between students' expectations and their actual experience;
- Students learning Chinese exhibited the highest satisfaction ratio with their language school, whilst the least satisfied were students in Australia (19% would opt for another school);
- However positive the results for school-related factors were, one in five students would opt for a different accommodation type.

CHAPTER 1

RESPONDENT PROFILE

Following 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

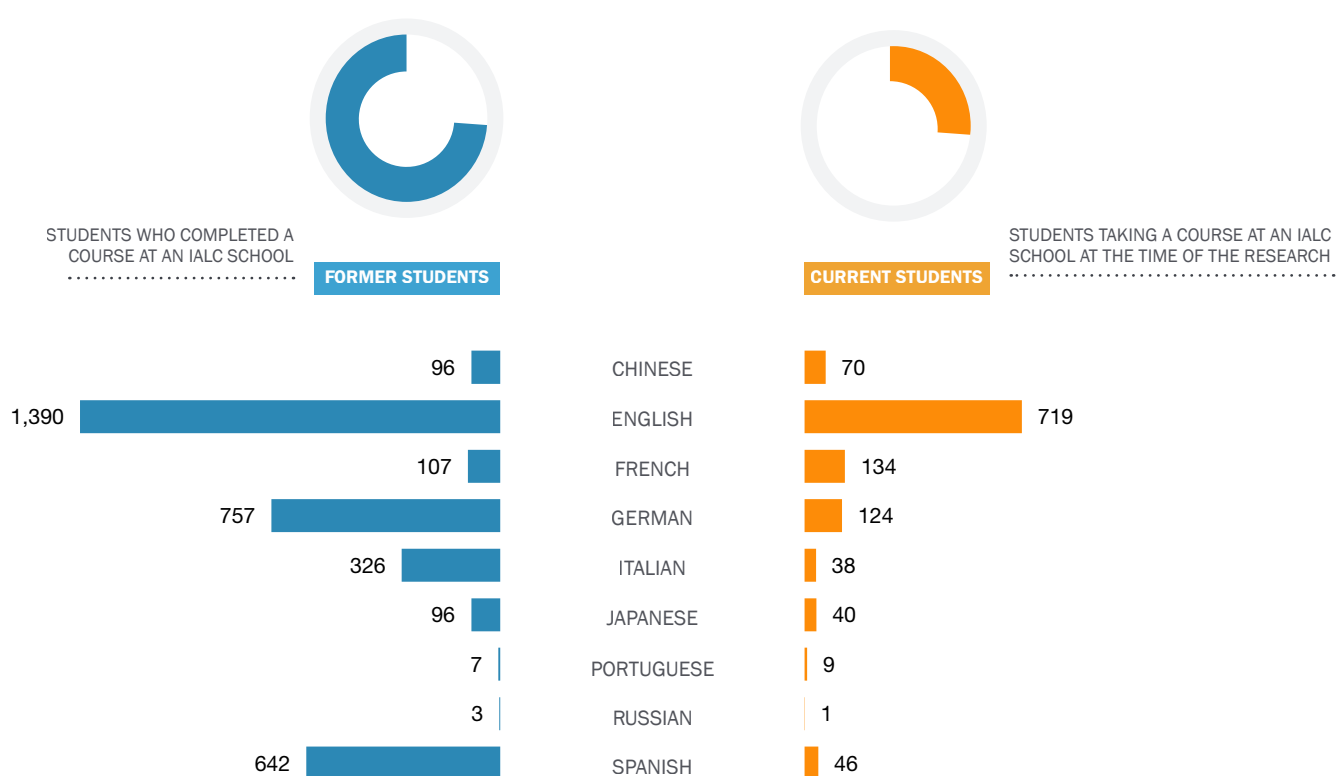
With 136 student nationalities taking part, the online survey was both geographically and broadly representative. This demonstrates the truly cosmopolitan blend of students at IALC schools.

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%).

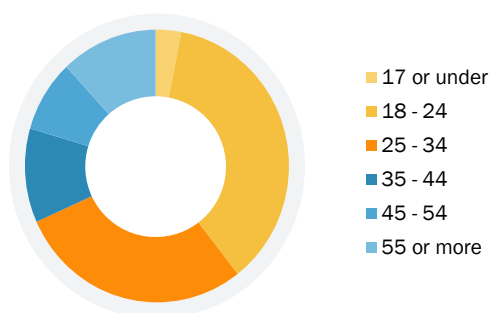
Due to the low number of IALC schools teaching Russian and Portuguese, only a handful of responses were gathered, and were not, therefore, analysed separately.

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.

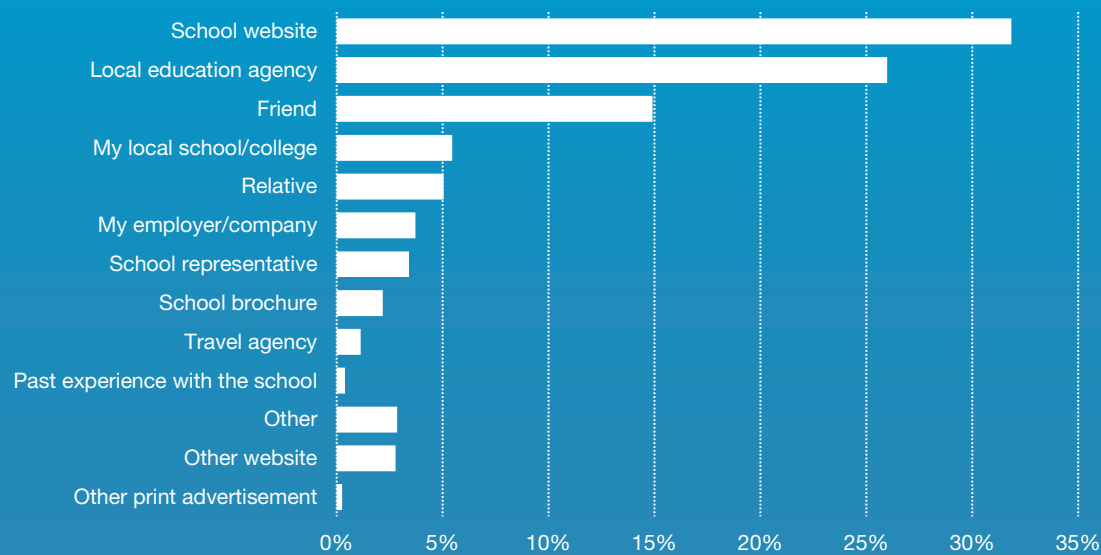
CHAPTER 2

STUDENT EXPECTATIONS

This chapter elaborates on what students' expectations towards language study abroad are and how these are shaped. By capturing input from students themselves it is possible to assess the quality of information provision to students and

establish how it influences their assumptions. Essentially, this part of the research investigated how well-equipped students were with particular information, thereby determining how the information provision affects fulfilment of their expectations.

MAIN SOURCE OF INFORMATION



n=4,300

The key discovery revealed by the research is that, in essence, the vast majority of IALC students rely on three main sources of information when navigating their school search.

Almost one third of students (32%) depend primarily on a school website to learn more about a particular centre. Local education agents (i.e. operating in a student's home country) were the top resource for 26% of respondents. Importantly enough, 20% of students relied on a friend or relative,

highlighting the importance of word of mouth in the industry. Among other options, almost 4% of students sourced their information from their employer/company, and 3% based their knowledge on interaction with the school's staff.

With less than 40% of students actually utilising school-produced resources as their main source of information, it is imperative for schools to safeguard the flow of information to the end-customer.

MAIN SOURCE OF INFORMATION BY AGE GROUP AND LANGUAGE STUDIED

Age group	Top 1 source	%	Top 2 source	%	Top 3 source	%
17 or under	Local education agency	20%	Friend	17%	My local school/college	17%
18 - 24	Local education agency	29%	School website	23%	Friend	14%
25 - 34	School website	31%	Local education agency	27%	Friend	17%
35 - 44	School website	41%	Friend	15%	Local education agency	14%
45 - 54	School website	48%	Friend	11%	Local education agency	8%
55 or more	School website	44%	Friend	17%	Local education agency	7%

Language	Top 1 source	%	Top 2 source	%	Top 3 source	%
Chinese	School website	44%	My employer/company	17%	Friend	16%
English	Local education agency	38%	School website	17%	Friend	14%
French	School website	44%	Friend	14%	My employer/company	12%
German	School website	42%	Friend	19%	Local education agency	10%
Italian	School website	47%	Friend	18%	Other	18%
Japanese	School website	62%	Friend	9%	Local education agency	7%
Spanish	School website	41%	Friend	11%	Local education agency	10%

n=4,300

When breaking down the results to particular age groups, there is a clear gradual shift from using a local education agency to the preference of using a school website as the main source of information. Whilst turning to agencies for information is popular with the younger groups, school websites start to prevail with the 25-34 demographic. Similarly, there is also a tendency to increasingly rely on friends as student age increases.

In a comparison by language, the overall supremacy of school website as the main source is somewhat disrupted, as education agents are predominant in the case of English. English was also

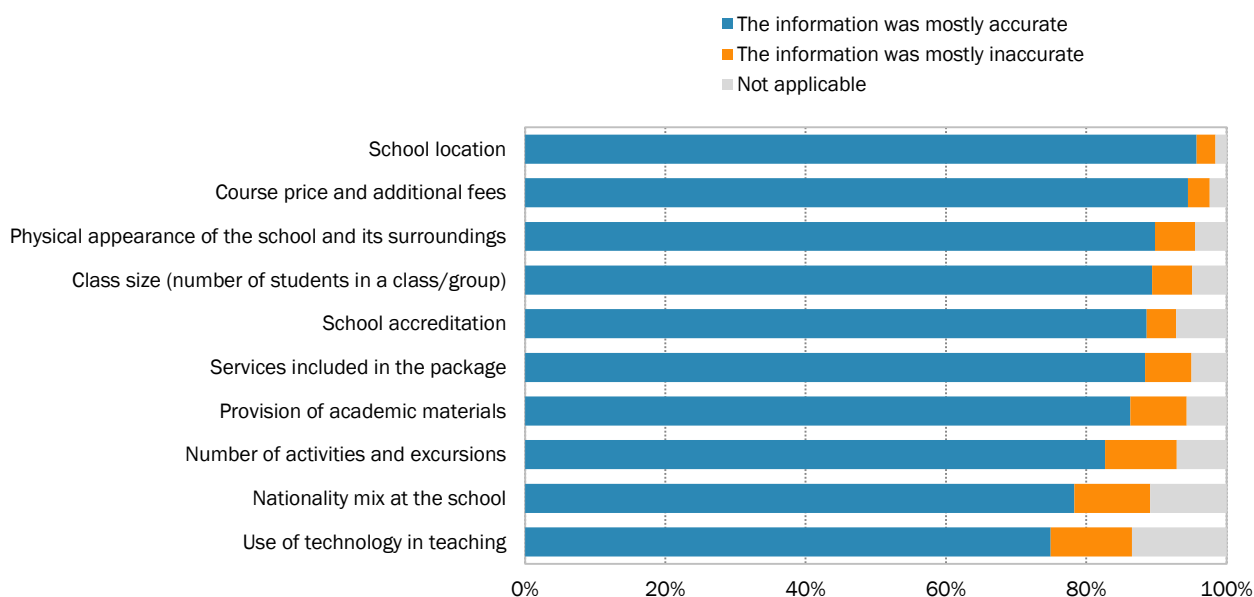
the language where respondents claimed the most diverse range of primary information sources.

For Chinese and French, a significant proportion of respondents identified their company within the top 3 information sources, indicating that their study abroad was in some way work related.

Overall, the data underscores just how important age segmentation is to IALC schools when attracting prospective students.

STUDENT EXPECTATIONS

Pre-arrival information accuracy

INFORMATION
ACCURACY

n=4,124

To investigate the topic of information provision, students were queried on the accuracy of information provided to them. The results shed light on areas where better dissemination of information could assist in managing students' expectations.

In general, IALC students reported that upon arrival at their school their expectations for all screened factors were largely aligned with reality.

Almost 95% of respondents claimed that course price and additional fees were reliable, validating a high level of financial transparency. Students also positively assessed school-related factors - its location, physical appearance, and accreditation.

Nevertheless, some responses highlighted the need for schools to scrutinise students' unfulfilled assumptions.

As many as 12% of students reported that information on the use of technology in the teaching process was mostly inaccurate.

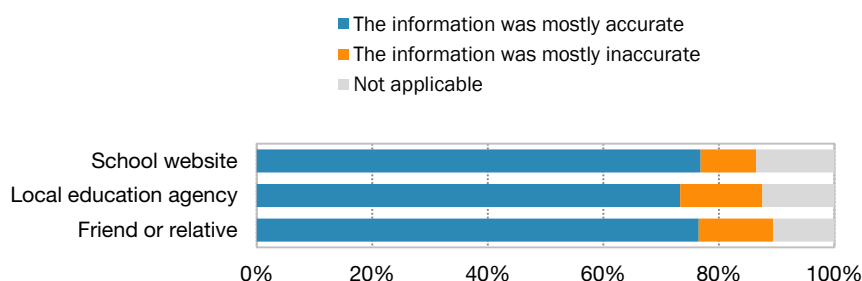
Schools were also challenged to think of how to provide more

accurate data on the nationality mix at the school, and to better outline their extra-curricular programme with regard to the number of activities and excursions.

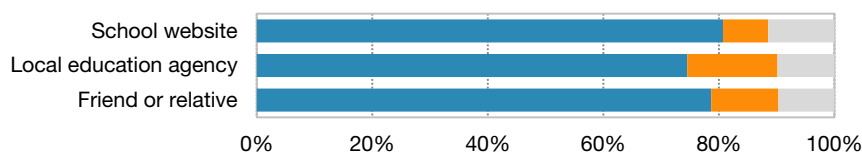
To complement the analysis, the research evaluated whether the accuracy of information varied by main source. While the results do not provide a completely different picture, there is a noteworthy increase in the number of IALC students reporting inaccurate information sourced from agencies as opposed to those relying on the school website.

INFORMATION ACCURACY BY MAIN SOURCE OF INFORMATION

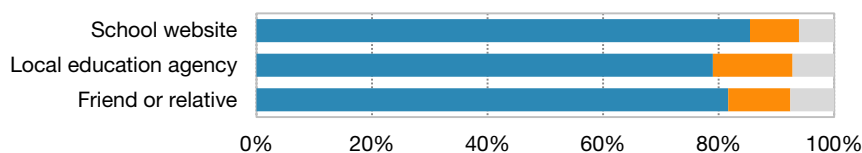
USE OF TECHNOLOGY IN TEACHING



NATIONALITY MIX



NUMBER OF ACTIVITIES AND EXCURSIONS



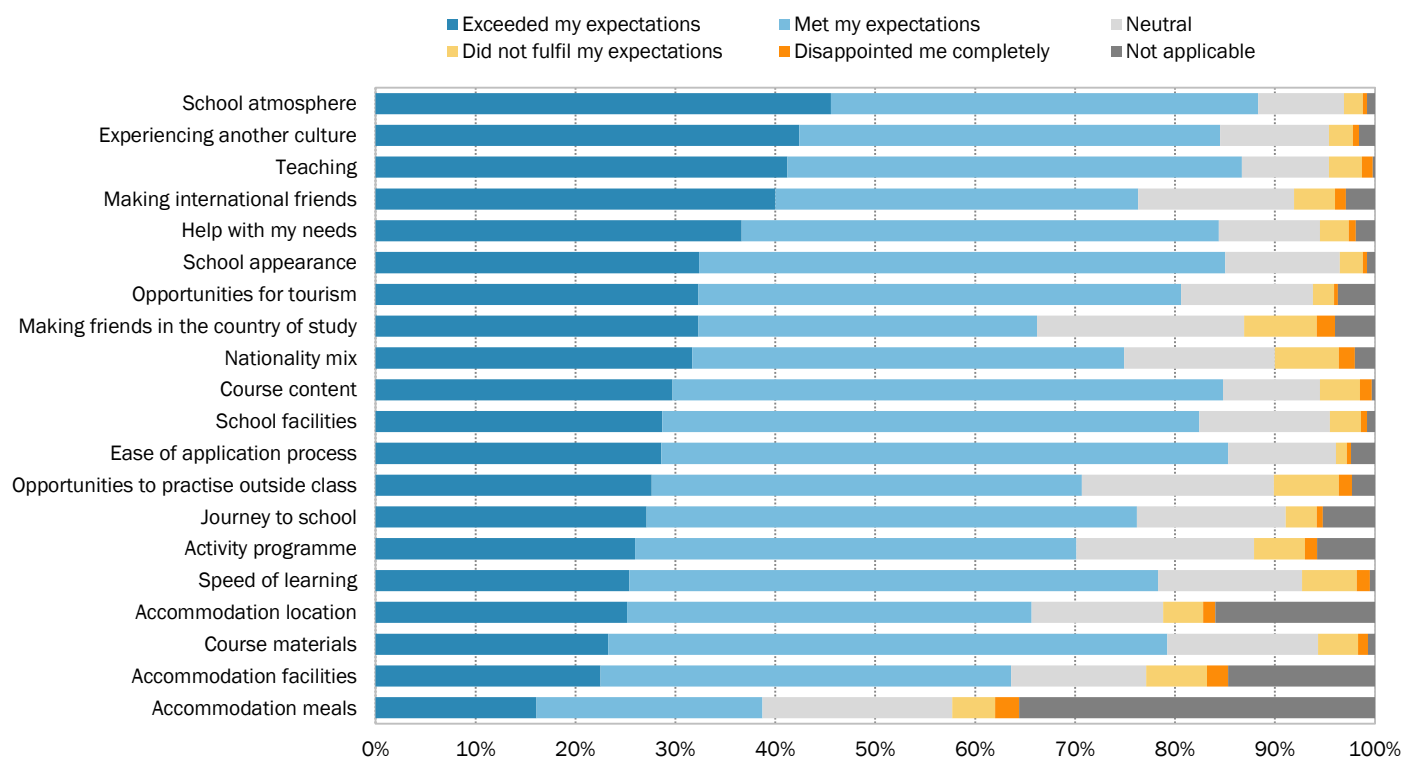
n=4,106

When examining these three ambiguous information segments, it appears that having an intermediary between a school and a prospective student (such as an agency or friend/relative) leads to a certain level of misrepresentation.

Most notably, students using agencies as their main source of information reported a higher level of inaccuracy in nationality mix than those sourcing this information from the school website (15% vs 7%).

STUDENT EXPECTATIONS

Fulfilment of expectations

FULFILMENT
OF EXPECTATIONS

n=4,101

In order to grasp the complex nature of expectations, students were requested to assess how their assumptions were fulfilled in 20 different aspects.

On average, 30% of respondents said their expectations were exceeded, with a further 45% of students acknowledging their expectations were met. Another 14% of students were neutral in their responses.

From a bird's-eye perspective, academic- and cultural immersion-related factors scored very highly. School atmosphere, experiencing another culture, and teaching were the top three factors exceeding students' expectations.

School atmosphere, teaching and ease of application process

were the overall best performing factors (where students' expectations were either exceeded or met).

Students were also delighted with course content, school appearance, and assistance with their needs.

If the research intimated any opportunities for possible improvement, these were largely tied to out-of-class activities.

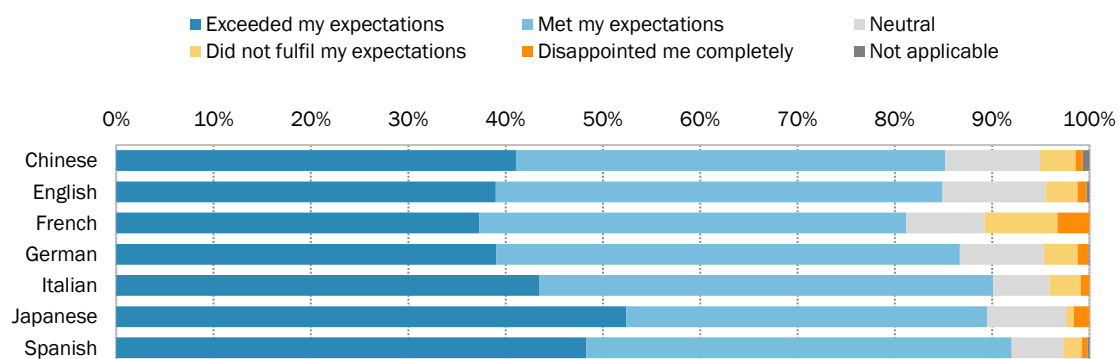
Students also anticipated more value in making friends in the country of their study, opportunities to practise outside class and nationality mix — with the latter being perhaps connected to the gap in information provision discussed earlier.

A breakdown into fulfilment of expectations by language follows.

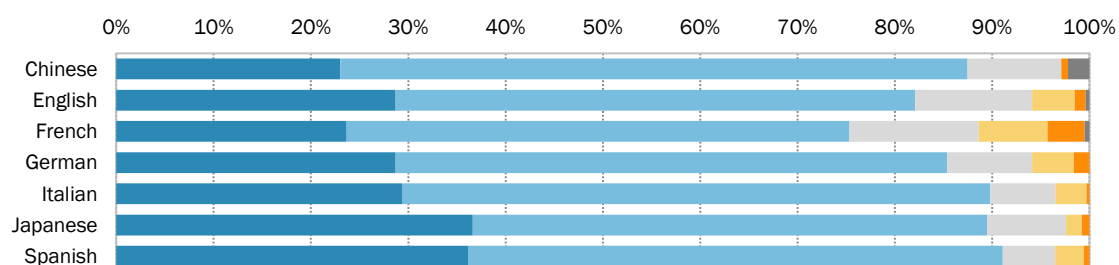
FULFILMENT OF EXPECTATIONS: TEACHING ASPECTS



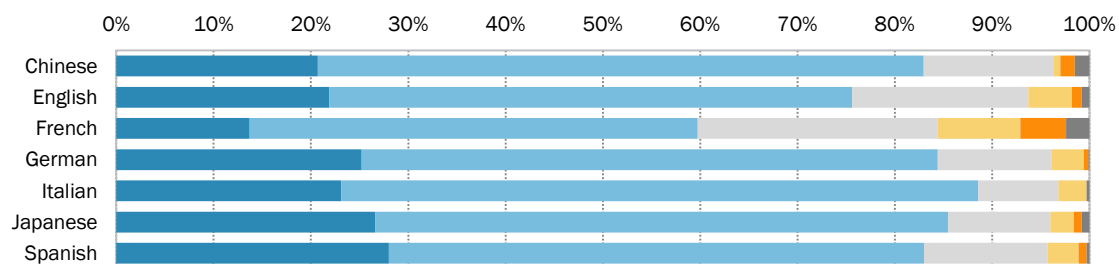
TEACHING



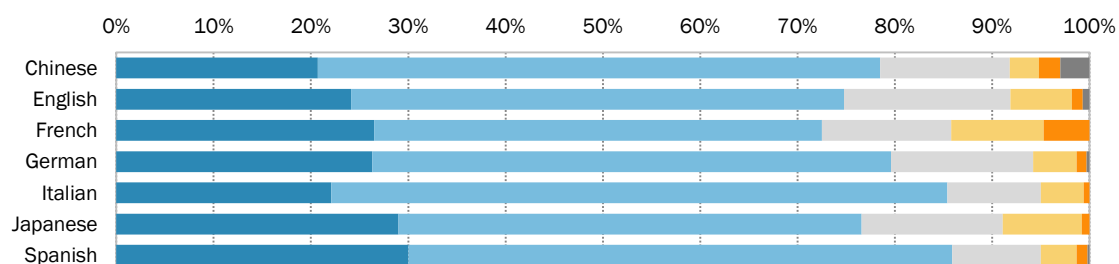
COURSE CONTENT



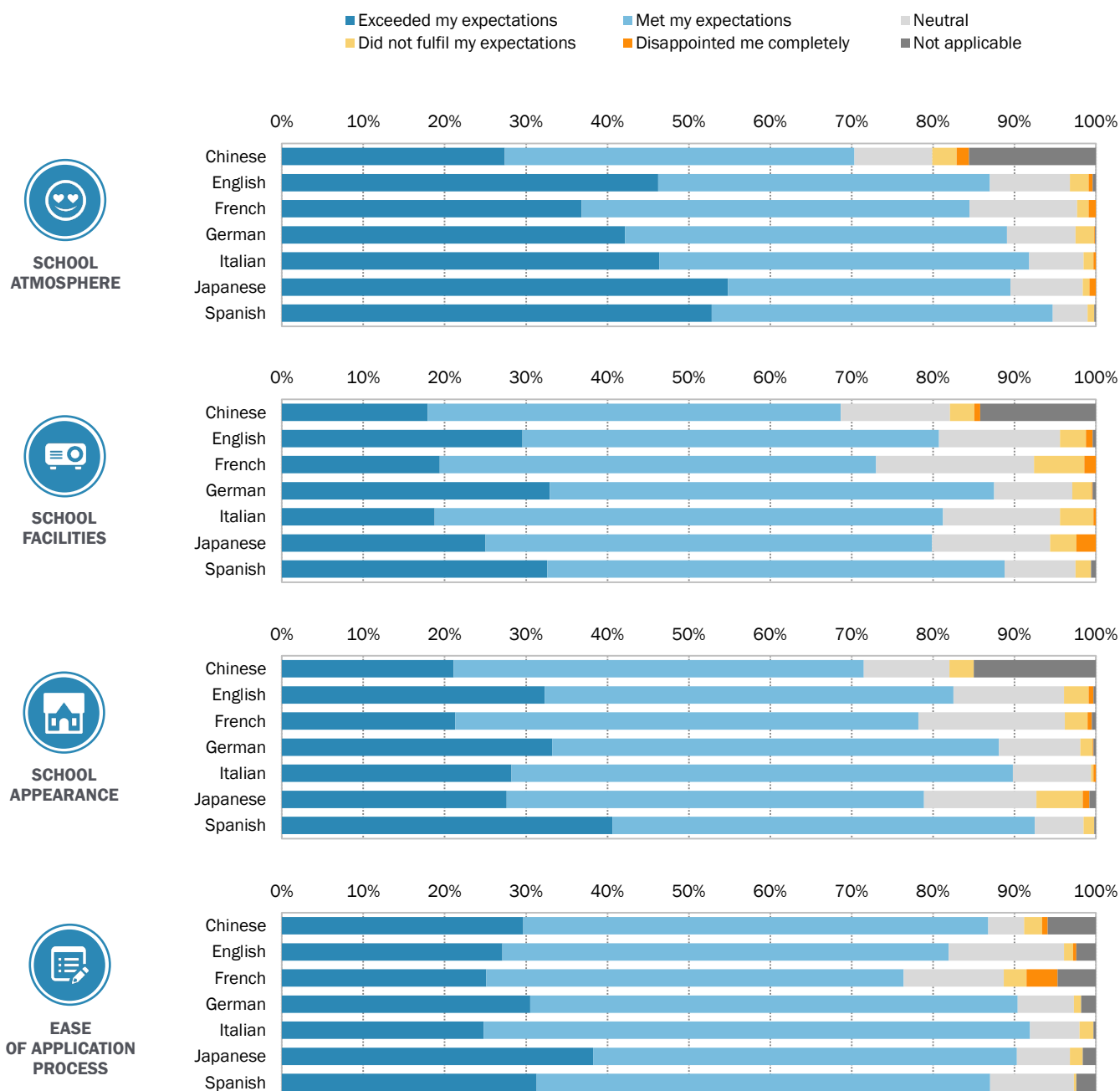
COURSE MATERIALS



SPEED OF LEARNING



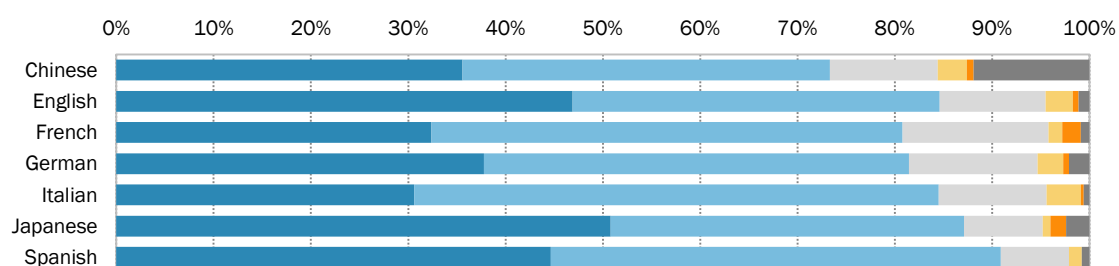
FULFILMENT OF EXPECTATIONS: SCHOOL-RELATED ASPECTS



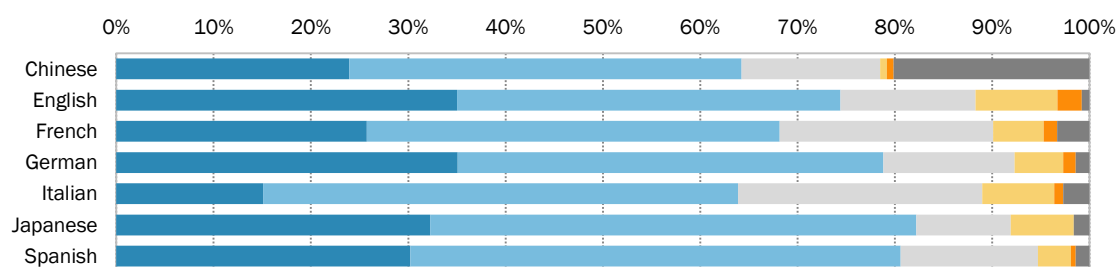
FULFILMENT OF EXPECTATIONS: CULTURAL ASPECTS

■ Exceeded my expectations ■ Met my expectations ■ Neutral
■ Did not fulfil my expectations ■ Disappointed me completely ■ Not applicable

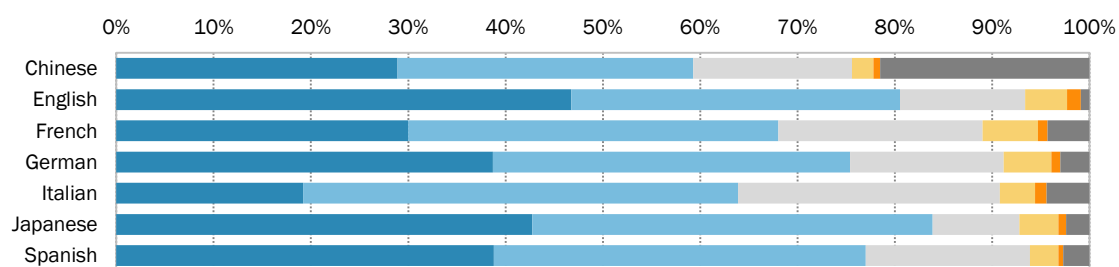
EXPERIENCING ANOTHER CULTURE



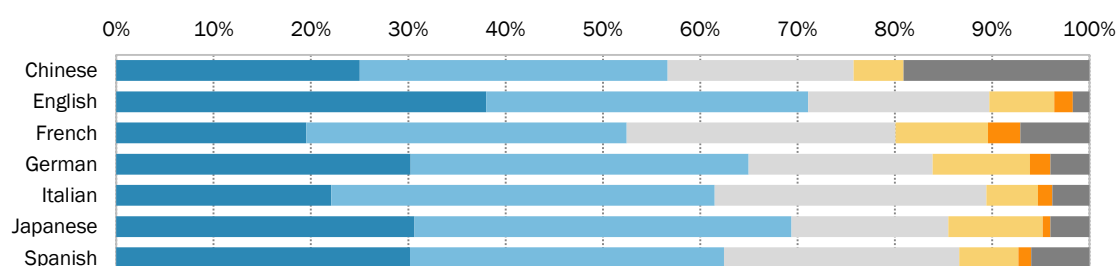
NATIONALITY MIX



MAKING INTERNATIONAL FRIENDS



MAKING LOCAL FRIENDS

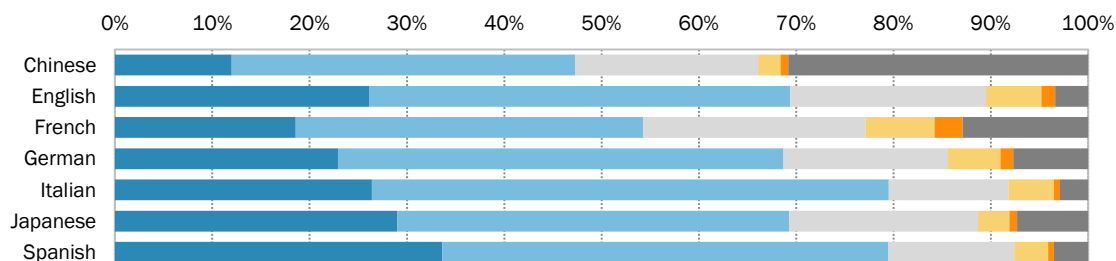


FULFILMENT OF EXPECTATIONS: OUTSIDE CLASSROOM-RELATED ASPECTS

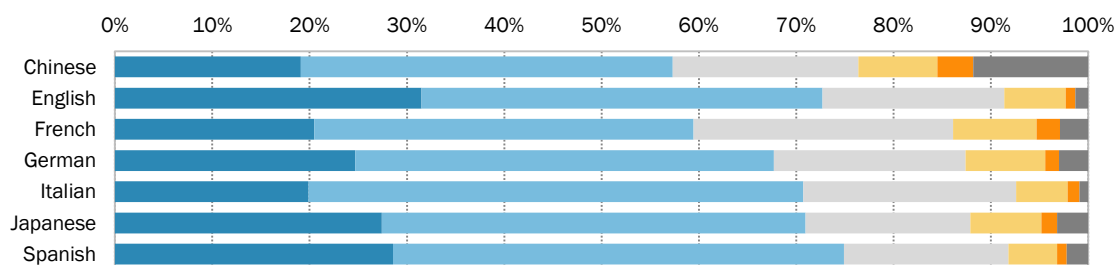
■ Exceeded my expectations ■ Met my expectations ■ Neutral
■ Did not fulfil my expectations ■ Disappointed me completely ■ Not applicable



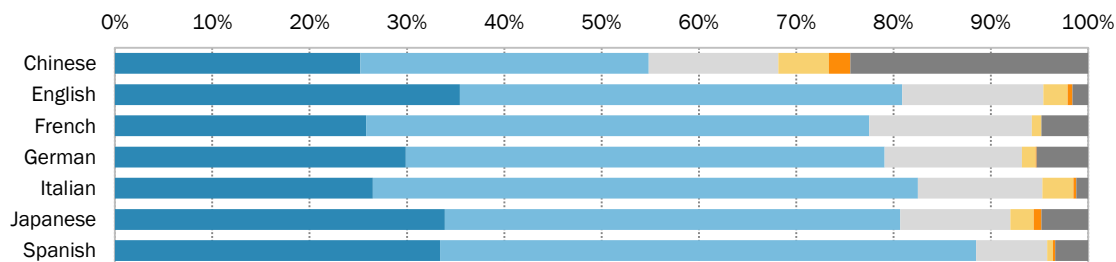
ACTIVITY PROGRAMME



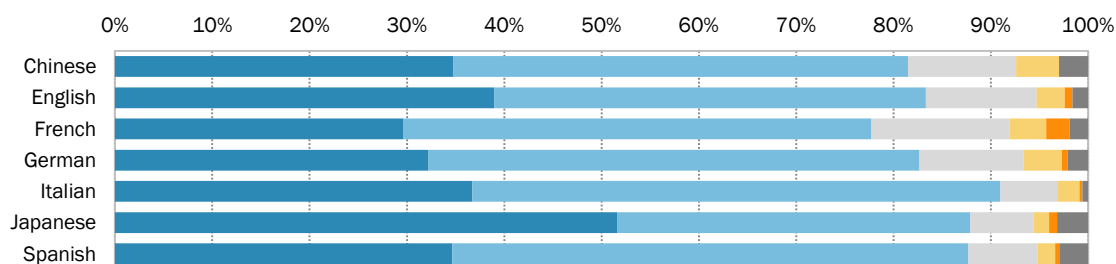
OPPORTUNITIES TO PRACTISE OUTSIDE CLASS



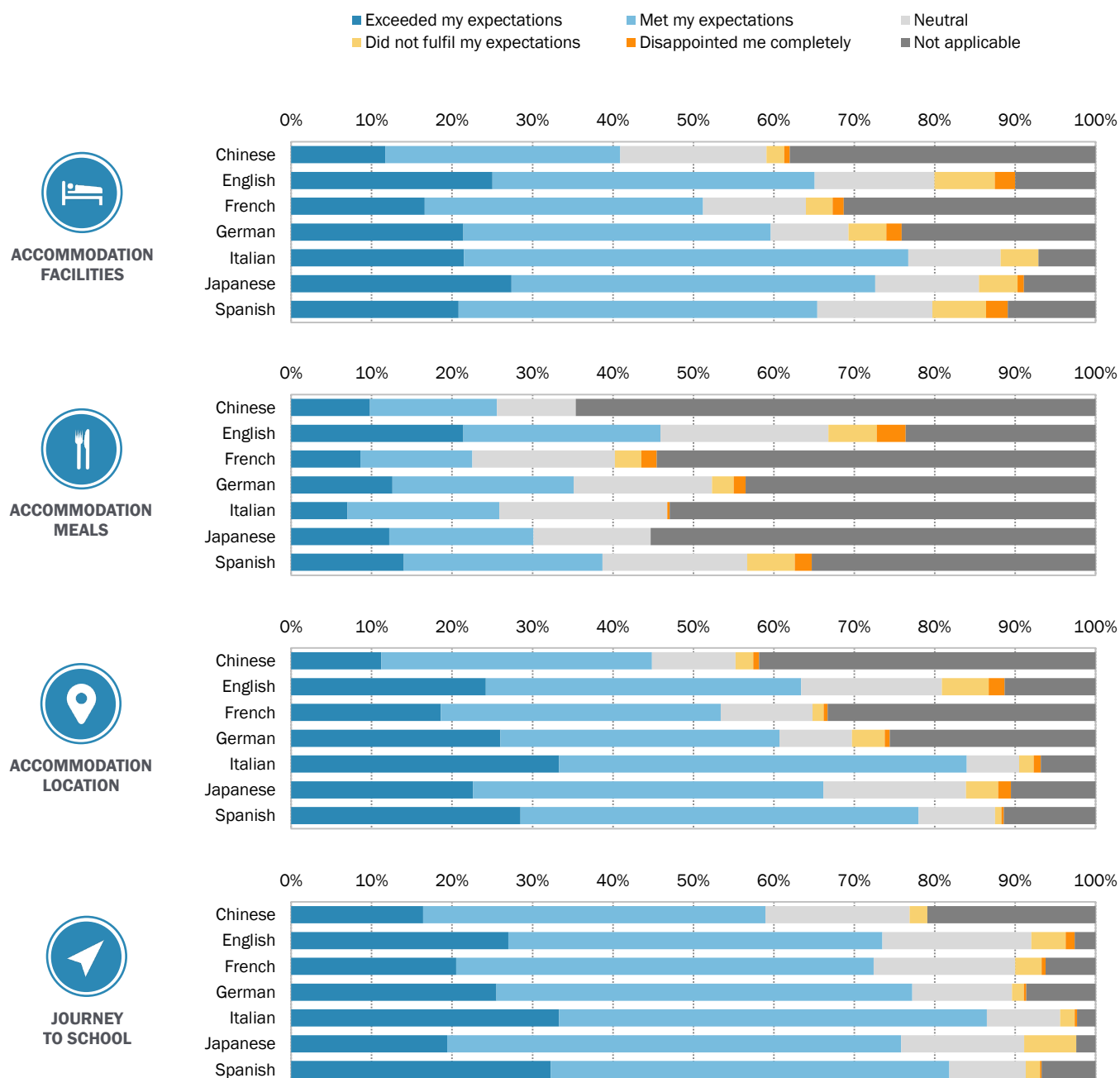
OPPORTUNITIES FOR TOURISM



HELP WITH MY NEEDS



FULFILMENT OF EXPECTATIONS: ACCOMMODATION-RELATED ASPECTS



CHAPTER 3

STUDENT EXPERIENCES

The student experience was defined as the perceived quality of a designated set of language course attributes.

A score-based ranking method was utilised to quantify students’ assessment, both before and after course commencement, as well as to establish the difference between the anticipation and

reality a student faced.

The resulting benchmark provides an insight into which features students place emphasis on (i.e. what is the hierarchy of their priorities when it comes to studying abroad), and how these shifted once they embraced a practical experience.

ASSESSMENT OF THE STUDENT EXPERIENCE

FORMER STUDENTS			CURRENT STUDENTS	
BEFORE	AFTER		BEFORE	AFTER
6.9	7.5	QUALITY OF ACCOMMODATION	7.0	7.2
6.7	7.7	QUALITY OF ACTIVITY PROGRAMME	7.1	7.4
7.1	7.8	QUALITY OF SCHOOL FACILITIES	7.3	7.6
7.2	8.2	QUALITY OF SUPPORT	7.4	7.9
7.2	7.8	QUALITY OF TEACHING MATERIALS	7.4	7.6
7.5	8.6	QUALITY OF TEACHING STAFF	7.7	8.3
6.8	7.3	QUALITY OF TECHNOLOGY USED	7.1	7.2
7.6	8.4	QUALITY OF THE LANGUAGE COURSE	7.9	8.0

n=2,808

n=928

LEGEND

BEFORE (1-10): the higher the number, the more expectations the student had.
AFTER (1-10): the higher the number, the better quality the student received.

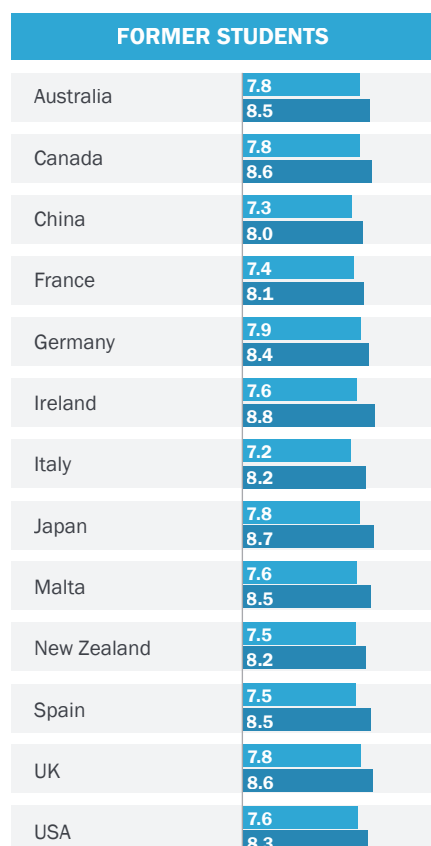
Students are pragmatic in their study abroad objectives. Their primary goal is to seek quality language tutoring. Features such as school facilities and activity programmes are of secondary consideration.

A common denominator for both student types was that they had the highest hopes for the quality of the language course, and secondly, for the quality of teaching staff. Within the screened factors, students had the lowest experience from the accommodation provided.

For all indicators in question, students rated their actual experience above their initial assumptions. The biggest change was found in the perception of the quality of teaching staff, with quality of support a close second.

Furthermore, when comparing the response levels for former and current students, the appreciation of these attributes appears to grow with time — former students reported lower entry expectations, yet claimed to have had better quality student experiences.

QUALITY OF THE LANGUAGE COURSE BY DESTINATION



LEGEND

BEFORE	the higher the number, the more expectations the student had.
AFTER	the higher the number, the better quality the student received.

n=2,647

By diving deeper into the student experience by destination of study, only minor country-by-country variations were identified. The highest quality experiences were anticipated by former students set to learn German in Germany (overall score 7.9). The bar was also set high for schools in Australia, Japan, and the UK.

In reality, the leader, in terms of highest experience, was Ireland, which also demonstrated the biggest jump (+1.2). Centres in Japan delivered the second best quality language courses according to the respondents. Students were also satisfied with the tutoring in the UK and Canada.

ASSESSMENT OF THE STUDENT EXPERIENCE BY LANGUAGE STUDIED

	FORMER STUDENTS						
	CHINESE	ENGLISH	FRENCH	GERMAN	ITALIAN	JAPANESE	SPANISH
QUALITY OF ACCOMMODATION	6.5	6.9	6.8	7.1	6.5	7.1	6.9
	6.9	7.7	7.2	7.6	7.4	7.6	7.2
QUALITY OF ACTIVITY PROGRAMME	6.5	7.0	6.7	7.1	6.4	6.9	6.9
	6.9	7.8	6.9	7.6	7.5	7.6	7.7
QUALITY OF SCHOOL FACILITIES	6.8	7.1	7.0	7.3	6.7	7.0	7.0
	7.4	7.9	7.1	8.1	7.4	7.7	7.8
QUALITY OF SUPPORT	7.0	7.2	7.2	7.4	6.8	7.3	7.1
	7.9	8.3	7.7	8.1	8.0	8.6	8.1
QUALITY OF TEACHING MATERIALS	7.2	7.2	7.1	7.5	6.7	7.3	7.0
	7.5	7.8	7.2	8.0	7.6	8.1	7.8
QUALITY OF TEACHING STAFF	7.3	7.5	7.2	7.8	7.1	7.6	7.3
	8.2	8.7	8.3	8.6	8.4	8.8	8.6
QUALITY OF TECHNOLOGY USED	6.6	7.0	6.9	7.1	6.4	6.6	6.6
	6.8	7.4	7.0	7.5	6.8	6.9	7.0
QUALITY OF THE LANGUAGE COURSE	7.1	7.6	7.4	7.9	7.2	7.8	7.5
	7.8	8.4	8.1	8.4	8.2	8.7	8.5
	n=69	n=1,183	n=86	n=651	n=293	n=84	n=545

LEGEND

BEFORE	the higher the number, the more expectations the student had.
AFTER	the higher the number, the better quality the student received.

ASSESSMENT OF THE STUDENT EXPERIENCE BY LANGUAGE STUDIED

	CURRENT STUDENTS						
	CHINESE	ENGLISH	FRENCH	GERMAN	ITALIAN	JAPANESE	SPANISH
QUALITY OF ACCOMMODATION	6.3	7.2	6.8	6.8	6.5	6.5	6.7
	6.6	7.3	7.1	6.9	7.4	7.3	7.0
QUALITY OF ACTIVITY PROGRAMME	6.8	7.3	6.4	7.0	6.2	6.9	6.9
	7.1	7.4	7.1	7.6	7.4	7.5	7.8
QUALITY OF SCHOOL FACILITIES	6.4	7.4	7.0	7.3	6.5	6.9	7.0
	6.9	7.6	7.2	7.9	7.6	6.6	8.0
QUALITY OF SUPPORT	6.7	7.5	7.1	7.3	6.8	7.5	7.2
	7.2	8.0	7.5	7.9	7.8	8.4	8.4
QUALITY OF TEACHING MATERIALS	6.9	7.5	7.0	7.5	6.4	7.2	7.0
	7.5	7.6	7.1	7.9	7.6	8.0	7.8
QUALITY OF TEACHING STAFF	7.4	7.8	7.5	7.7	7.2	7.5	7.4
	8.0	8.3	8.1	7.9	8.1	8.5	8.6
QUALITY OF TECHNOLOGY USED	6.2	7.3	6.7	6.9	5.9	6.5	6.9
	6.0	7.4	6.6	7.5	6.7	6.8	7.1
QUALITY OF THE LANGUAGE COURSE	7.4	8.0	7.5	7.9	7.2	7.7	7.7
	8.1	8.0	7.8	8.1	8.1	8.3	8.4
	n=49	n=591	n=114	n=98	n=33	n=33	n=37

LEGEND

BEFORE	the higher the number, the more expectations the student had.
AFTER	the higher the number, the better quality the student received.

Subsequently, former IALC students were queried about their perceived academic progress after they finished their course. Respondents ranked a selected array of areas, as well as an

overarching summary indicator — how content they were in terms of achieving their learning goal.

ACADEMIC PROGRESS BY AREA

		IALC BENCHMARK
ACHIEVEMENT OF LEARNING GOAL		3.57
GRAMMAR	W V	3.39
LISTENING COMPREHENSION		3.71
PRONUNCIATION		3.48
READING SKILLS		3.54
SPOKEN FLUENCY		3.52
VOCABULARY		3.5
WRITING SKILLS		3.19

n=2,883

Generally speaking, students reported between making slightly more progress and much more progress than they anticipated. Data acquired from students on their self-perceived progress assisted in gauging the various effects that learning a language in a native environment triggers.

Students acknowledged the most significant progress in their listening comprehension, which closely aligns with being immersed in a native environment. The second strongest improvement concerned their reading skills. The research therefore suggests that language study abroad primarily caters to students' abilities that drive a better understanding of the foreign language. The interactive nature of the learning process was also demonstrated by improvement in writing skills and grammar, which though at the lower end of the spectrum, were still assessed as "progress slightly more than expected."

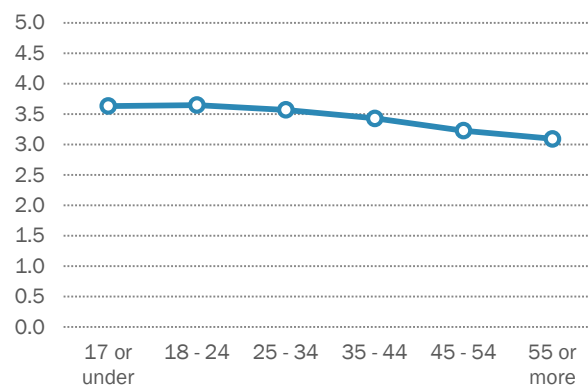
Cross-referencing the academic progress by age group, one can see that it slightly decreases with increasing age. The highest overall progress was reported in case of the 18-24 age group, closely followed by junior students (17 years old or under).

LEGEND

The resulting score is a weighted average:

- 0: no progress
- 1: progress almost as expected
- 2: progress as expected
- 3: progress slightly more than expected
- 4: progress much more than expected
- 5: I was delighted by the progress I made

ACADEMIC PROGRESS BY AGE GROUP



n=2,883

There is an obvious connection between the time spent on a language course abroad and higher academic progress. Comparing data for students staying for less than 10 weeks to

those opting for longer stays revealed that not only did students' proficiency increase with more time spent on the course, but longer stays also contributed to a more balanced development.

ACADEMIC PROGRESS BY LENGTH OF STAY

		>10 WEEKS	10+ WEEKS	DIFFERENCE
ACHIEVEMENT OF LEARNING GOAL		3.45	3.87	+0.42
GRAMMAR	W V	3.27	3.68	+0.41
LISTENING COMPREHENSION		3.63	3.9	+0.27
PRONUNCIATION		3.43	3.61	+0.18
READING SKILLS		3.43	3.78	+0.35
SPOKEN FLUENCY		3.4	3.82	+0.42
VOCABULARY		3.42	3.68	+0.26
WRITING SKILLS		3.05	3.53	+0.48

LEGEND

The resulting score is a weighted average:

- 0: no progress
- 1: progress almost as expected
- 2: progress as expected
- 3: progress slightly more than expected
- 4: progress much more than expected
- 5: I was delighted by the progress I made

MAX difference

MIN difference

n=2,883

Although listening comprehension remains the best-developed area, the variations between the progress made by the two student cohorts outlined above are considerable.

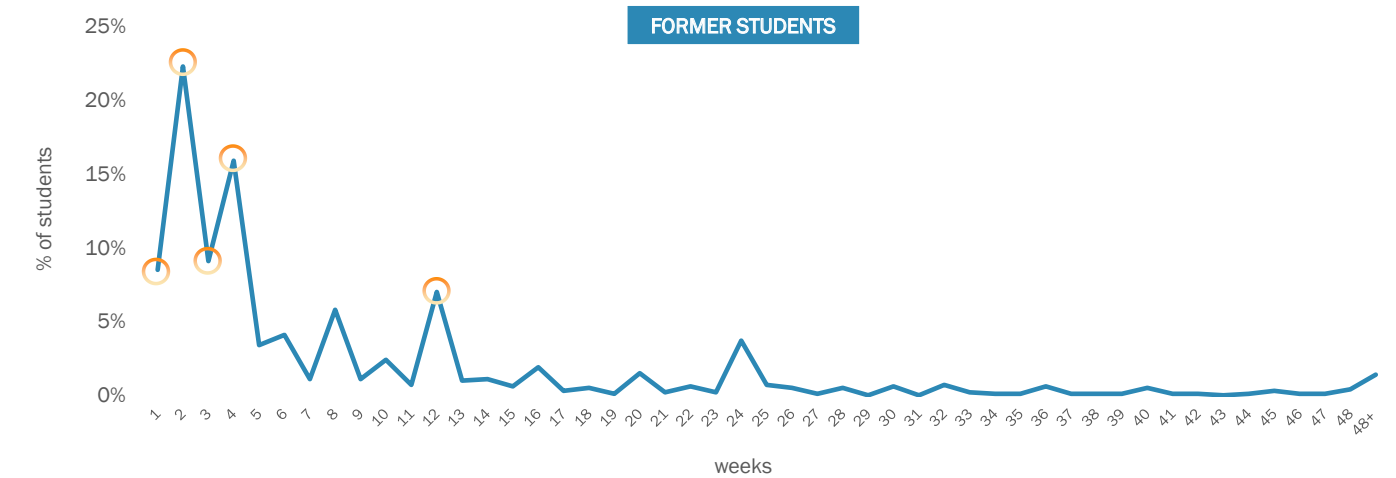
Writing skills, the advancement of which is quite marginalised in short-term courses, improve the most over time. Spoken fluency also developed significantly since students were more immersed in the local environment.

As such, the more even distribution progression is also connected to students' motivation to learn a language abroad. Longer programmes are usually centred around academic content that focuses on multi-faceted learning.

In practice, it affects 29% of IALC school students (share of learners opting for 10 or more weeks), as 71% of all students stay for less than 10 weeks.

For a more detailed analysis of the average length of stay by particular languages, please see the following page.

PERCENTAGE OF FORMER STUDENTS
BY COURSE DURATION IN WEEKS



n=3,096

Over half of students (56%) stay for one to four weeks. 8-, 12-, and 24-week programmes are also popular with IALC schools.








As a reference point, the average length of stay in an IALC school varies considerably by language.

FORMER STUDENTS
BY AVERAGE LENGTH OF STAY



n=3,096

ACADEMIC PROGRESS BY LANGUAGE

		CHINESE	ENGLISH	FRENCH	GERMAN	ITALIAN	JAPANESE	SPANISH
ACHIEVEMENT OF LEARNING GOAL		3.56	3.59	3.5	3.56	3.48	3.7	3.55
GRAMMAR	W V	3.4	3.35	3.22	3.41	3.39	3.68	3.43
LISTENING COMPREHENSION		3.54	3.79	3.41	3.69	3.61	3.77	3.67
PRONUNCIATION		3.43	3.47	3.37	3.47	3.47	3.7	3.51
READING SKILLS		3.37	3.5	3.52	3.59	3.47	3.54	3.59
SPOKEN FLUENCY		3.35	3.68	3.37	3.51	3.25	3.63	3.39
VOCABULARY		3.65	3.51	3.5	3.55	3.33	3.63	3.48
WRITING SKILLS		2.78	3.29	3.11	3.2	3.02	3.24	3.1

LEGEND

The resulting score is a weighted average:

- 0: no progress
- 1: progress almost as expected
- 2: progress as expected
- 3: progress slightly more than expected
- 4: progress much more than expected
- 5: I was delighted by the progress I made

MAX value

MIN value

In another language-to-language comparison, the highest progress was declared by Japanese language students, with an average score of 3.6 (all seven factors considered), and 3.7 score in terms of achieving their learning goal.

n=4,124

Improving writing skills finished at the bottom of the academic progress ranking for all languages compared.

On the other hand, when looking at the maximum values, the pattern becomes somewhat disrupted. It can be seen that students learning English, German, Italian, Japanese, and Spanish were most pleased about their progress in listening comprehension; whereas, students of Chinese mostly improved their vocabulary, while French language learners enhanced their reading skills.

CHAPTER 4

STUDENT SATISFACTION

To conclude on the student journey through language study abroad, this chapter analyses how the student experiences translate into student satisfaction. Satisfaction levels of course participants is not only the most important feedback for schools but it is also an effective marketing tool.

OVERALL SATISFACTION BY STUDENT STATUS



Note: Percentages do not add up to 100% due to rounding; n= 3,861

The aggregate data on satisfaction shows that as much as 47% of all former students reported greater satisfaction than expected with their IALC school. A further 29% of respondents indicated being slightly more satisfied than expected.

With IALC schools satisfying 93% of all former students, the results bear a powerful marketing message to prospective students and partner organisations.

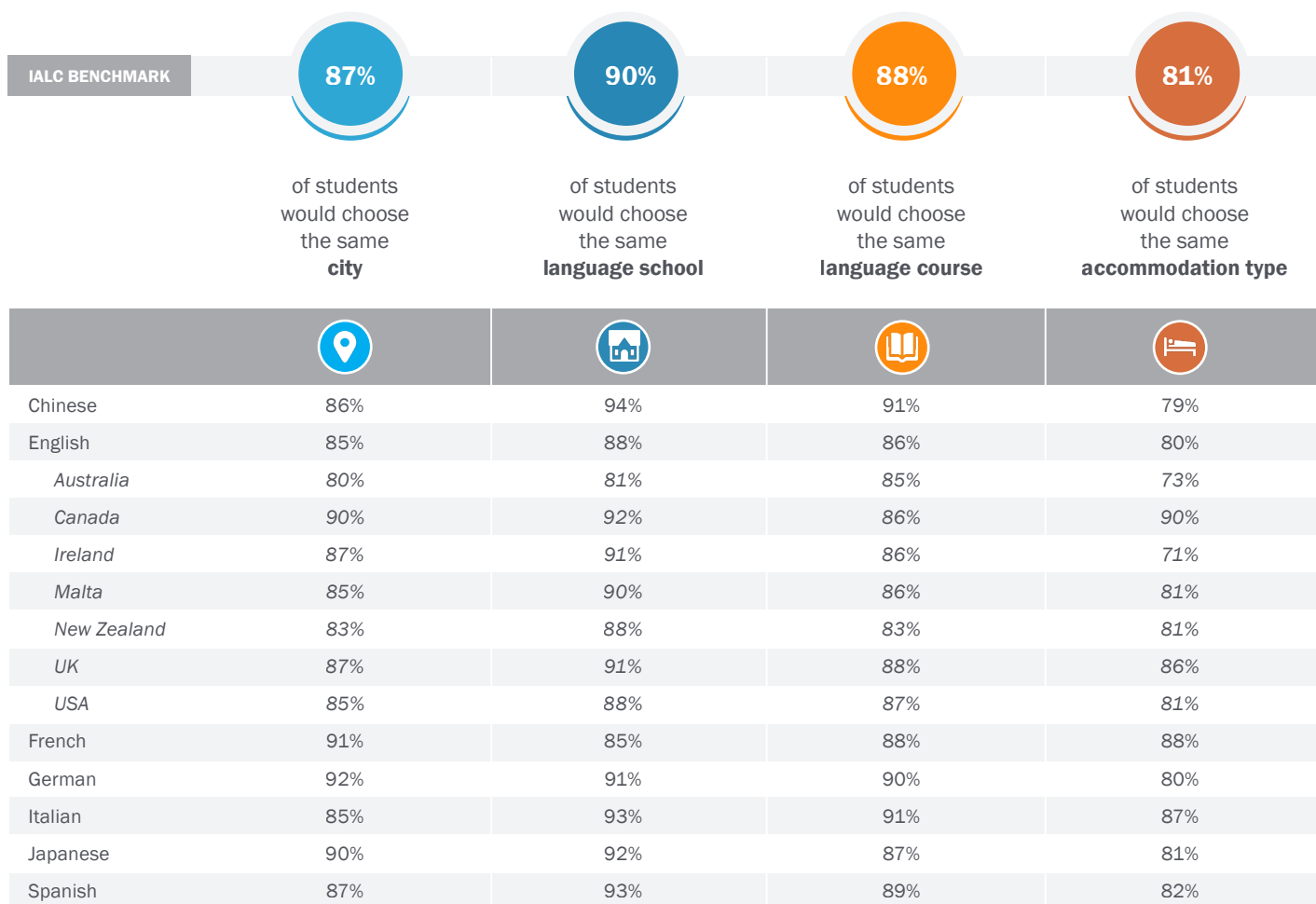
Current students were generally less satisfied, however, similar to the assessment of the student experience, the appreciation for the entire study abroad experience appears to grow with time.

OVERALL SATISFACTION BY LANGUAGE

	CHINESE	ENGLISH	FRENCH	GERMAN	ITALIAN	JAPANESE	SPANISH
FORMER STUDENTS							
Much more satisfied than expected	24%	47%	26%	43%	49%	59%	51%
Slightly more satisfied than expected	47%	30%	34%	30%	26%	24%	29%
Satisfied as expected	20%	17%	22%	19%	19%	10%	14%
Satisfied almost as expected	8%	5%	12%	6%	5%	6%	5%
Not satisfied	2%	2%	7%	3%	1%	1%	2%
CURRENT STUDENTS							
Much more satisfied than expected	29%	31%	40%	27%	41%	47%	37%
Slightly more satisfied than expected	36%	27%	27%	33%	34%	22%	40%
Satisfied as expected	26%	23%	14%	32%	19%	16%	20%
Satisfied almost as expected	7%	15%	9%	6%	6%	16%	3%
Not satisfied	2%	4%	9%	3%	0%	0%	0%

Note: Percentages do not add up to 100% due to rounding; n= 3,841

SATISFACTION BY SELECTED STUDY ABROAD ATTRIBUTES



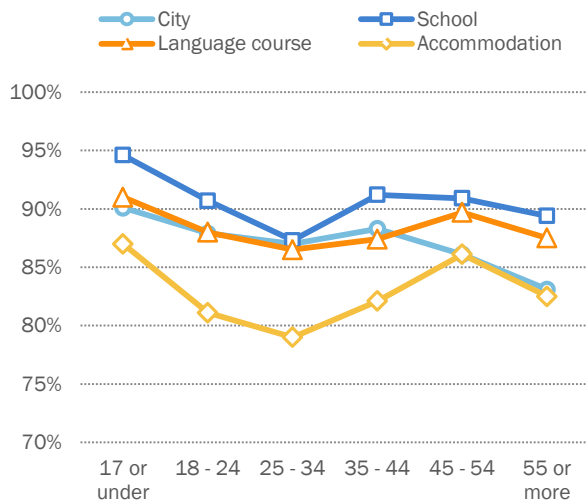
n=3,752

In a cross-language comparison, students most content with their selection of study destination were those studying German, French, Japanese, and English (all above 90%). Students learning Chinese exhibited the highest satisfaction ratio with their language school, while the least satisfied were students in Australia (19% would opt for another school). Most likely to choose the same language course were Chinese and Italian language students (both at 91%).

However positive the results for school-related factors were, one in five students would opt for a different accommodation type.

The only exception to this general trend across the industry were students learning in Canada, France, and Italy, where accommodation satisfaction levels reached 90%, 88%, and 87% respectively. Accordingly, accommodation as a factor drags overall student satisfaction down.

SATISFACTION BY FACTOR AND AGE GROUP



n=3,752

It is generally easier to impress younger students than their older counterparts — especially as for many young students a language course abroad represents their very first experience of this kind.

The most balanced satisfaction ratios were found for language courses. On the contrary, the highest fluctuation was observed for the accommodation component, where satisfaction levels dropped below 80% for the 25-34 age group.

WOULD YOU RECOMMEND THE SCHOOL TO A FRIEND?



n=3,791

As the ultimate measure, students were posed with the question of whether or not they would vouch for their IALC school and recommend it to a friend. The results show that an overwhelming 94% of all students would do so.

CONCLUSIONS

The report introduces and analyses the experience of students in IALC schools through outlining their expectations and measuring their fulfilment. This report represents one of the first systematic attempts to map out largely uncharted territory, since it measures student experience at a global level.

The fact less than 40% of IALC students base their expectation on a school-related resource (website, school representative, brochure) as their main source of information when searching for a school, serves as an imperative for IALC members to take more control of information dissemination. Thanks to identifying gaps between a language centre and student in information provision, schools can manage the expectations by way of effectively adjusting their marketing and communication strategies, thus mitigating the risk of misrepresentation that occurs for features such as nationality mix and use of technology in teaching.

Students verbalised the areas in which IALC schools over-deliver when fulfilling their expectations: school atmosphere, provision of experiencing a different culture, and the teaching component. Similarly, they helped identify a number of weaker points that dragged the overall student experience down, primarily accommodation-related. The feedback from students themselves provides a roadmap to improve those respective attributes, so that IALC schools can become even more attractive to prospective students.

By introducing a wide array of breakdowns, schools can benchmark themselves to the entire IALC membership, other schools in their destination, or schools teaching the same language. What is, however, a common denominator for all students, regardless of the language studied, is that students principally seek quality of teaching and staff.

Whilst this report embodies a 'mirror' of the IALC schools, in terms of their students' experience, the findings have a much broader application. The data helps shed more light on exactly how learning a language abroad helps develop students' proficiency. Not only does the academic progress increase the amount of time spent learning a foreign language abroad, the research also showed that longer stays contribute to more balanced student development. While shorter stays largely develop students' listening comprehension and spoken fluency abilities, courses with duration of 10+ weeks displayed increased progress in vocabulary and writing skills, and as a result, a more evenly distributed progress.

Among the important takeaways for schools is the significant need for customer segmentation when dealing with prospective students and building their expectations. The report further identified varying patterns, preferences as well as satisfaction levels, by age groups.

Finally, 94% of satisfied customers who would recommend their IALC school to a friend is a compelling marketing tool that IALC schools can leverage to prospective students and partners alike. Due to the strong word of mouth tradition in the industry, the importance of satisfied students who can be effectively brought on board to become brand ambassadors is even more significant.



