



After a triple-dip recession, Italy's economy is finally on the road to recovery, with economic output (the quantity of goods or services produced by a country) expected to grow by 0.6 per cent in 2015 and by 1.5 per cent in 2016, according to the OECD. However, as Valerio Gruessner from Solemar www.solemar-sicilia.it in Sicily details there is still much to be done before the country, and its Italian language market, can rejoice.

"Let's be clear, the Italian economy is still in a shaky situation," says Valerio. However, there are encouraging signs of improvement, he adds, with national unemployment decelerating and GDP growth rate increasing.

Inbound tourism is also rebounding. "The revenues from this market section seem to have grown significantly," he relates and several elements have played to their favour including EXPO Milano which helped boost tourism numbers to the country.

In our last report on the Italian market (see STM December 2014, pages 42-44) it was suggested that inbound tourism could help Italy's economic recovery. The EXPO was the perfect vehicle to showcase Italian language, culture and tradition, but some feel it was an opportunity missed. "We perhaps didn't use it as we should have or how other countries would have used it," says Fabio Boccio at Studioitalia www.academiaistudioitalia.com in Rome.

Notwithstanding, tourism numbers in Italy have started to pick up (up 1.8 per cent

over 2013, according to UNWTO) and the country now ranks fifth in the world tourism rankings. The challenge schools now face is not so much how to attract overseas learners, more how and what to teach them, says Fabio. "The amount of tourists has decreased and institutions still struggle sometimes to find innovative ways to teach Italian through cultural or social elements of Italy."

Chiara Avidano at AbbeySchool Ciao Italy www.ciaoitaly-turin.com relates the growing international student population has brought positive changes to the city of Turin, with students helping to solve economic issues such as the house market crisis. "A lot of landlords solved the problem renting flats to international university students because they are able to pay," she says.

Over the last three years, Studioitalia – a department of the International

Language School (ILS) – has had a more innovative approach to course provision and its internship programme, which links language study with placements in areas such as fashion and design, has been well received. ILS University, another department of the ILS, was founded in 2014 and has subsequently introduced an undergraduate programme in Italian studies.

Istituto Galilei www.galilei.it in Florence has over 30 years' of experience offering language and culture programmes, asserts Eleonora Carmignani. More recently the school has developed two more cultural programmes: Live & Learn and La Dolce Vita – further evidence of the correlation between language and culture. German,

Top nationalities in Italy by student weeks, 2014

- German 15%
- Swiss 9.7%
- Russian 8.2%
- Italian 7.9%
- Austrian 6.6%
- American 5.8%
- Japanese 4.2%
- Dutch 3.5%
- Scandinavian/Finnish 3.5%
- French 3.4%

€673
(US\$912)

Average cost of a one-month course, excluding accommodation

€221
(US\$299)

Average cost of residential accommodation per week

€217
(US\$294)

Average cost of host family accommodation per week

*Currencies converted using rates from 17/06/2014

Source: ST Magazine Status survey on Italy

PHOTOS: SHUTTERSTOCK

3.5 weeks was the average length of stay

18.7 hours was the average language tuition per week

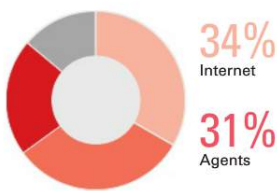
20.3 per cent was the average commission paid on a language course

30 per cent of students were aged 31-to-50 years

Agency costs accounted for **42 per cent** of schools' marketing spend

Italian schools spent an average of **24.2 per cent** of their income on marketing

Means of recruiting international students in Italy, 2014



Local bookings **21%**
Other means 14%

French, American and Australian student markets have performed best for the school but fewer enrolments have stemmed from Spanish-speaking countries and the Middle East, says Eleonora.

"Our students are coming from countries where the economic crisis has had a lower impact," says Valerio. "Germans, Australians, Austrians, Americans and British students are continuing to visit Italy to study the language." Enrolments have increased by between 10 and 20 per cent over the last three years and he attributes this positive performance to striking up new agent partnerships and investing in SEO-SEM and social media marketing. "The quality of courses is something really important but the winning point is the way you sell yourself in the market," he adds. A dated, un navigable website will only hold you back. "This is the biggest problem for language schools in Italy which might be also related to the decrease

in appeal of Italian language compared to Spanish for instance," he surmises.

AbbeySchool welcomed more Chinese and Japanese students this year. Decreases in South American and Russian students were countered by the incredible influx of French students, says Chiara.

The Russian market has been a consistent source market for schools, but numbers continue to decelerate (down 0.8 per cent over 2013 ST Magazine figures) and this presents its own challenges. "We lost a huge amount of students and opportunities because of such situation and the change with the Russian rouble that was and is so weak that students could not and can't still afford any more to come here to study our language," says Fabio. Conversely, the strong dollar is helping drive American enrolments, he says. Germany is the school's number one source owing to enhanced relations with German agencies.

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Key points in ST Magazine Status Survey Italy 2014

Number of participating organisations: **14**
 Total number of students at the organisations in 2014: **5,428**
 Total number of student weeks in 2014, estimated: **18,998**
 Participating schools: Accademia Italiana Salerno www.accademia-italiana.it; Campus L'Infinito www.campusinfinito.it; Centro Italiano www.centroitaliano.it; Dialogo Language Services www.dialogoplus.com; IH La Spezia www.ihlaspezia.it; IH Lake Como Team Lingue www.ihlakecomo.com; Istituto Galilei www.galilei.it; inlingua Genova www.inlinguagenova.it; Istituto Venezia www.istitutovenezia.com; Italiano & Co Lingua e Cultura www.italianoeco.com; Omnilingua Centro Linguistico e Cultura www.omnilingua.net; Orbit Lingua www.orbitlingua.it; Rimini Academy www.riminiacademy.it; Studio Italiano Tropea www.studioitaliano.it.

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