



Felca Members Association

Annual Report
2023 season

ST/STUDYTRAVEL

Associations detailed in this report



Countries detailed in this report



1. Argentina
2. Belgium
3. Brazil
4. Germany
5. Italy
6. Japan
7. Korea
8. Mexico
9. Spain
10. Taiwan
11. Turkey



Agencies operating in Argentina:

approximately 50

23

are members of ARSAA

In 2023:

Total from your association:

Language Students	Student Weeks	High School Students	University Students
2,402	7,206	40	90

Overall market growth compared to 2022:

Over 100% growth

Top 5 Destinations in 2023

Language

UK – **70%**

Canada & Australia – **15%**

Ireland – **10%**

New Zealand & USA – **4%**

Malta & South Africa – **1%**

High School

Canada

New Zealand

UK

Higher Education

Canada

New Zealand

Australia

Trends

We carried out research on 13th August, and the results show as follows:

1. Total number of LANGUAGE students:

2023: 2,402

2024: 2,065

2. Total number of HIGH SCHOOL students:

2023: 2,402

2024: 2,065

3. Total number of HIGHER EDUCATION students:

2023: 90

2024: 83

Trends

4. Total number of STUDY & WORK PROGRAM students:

2023: 204

2024: 206

5. Total number of WORK & TRAVEL PROGRAM students:

2023: 1,605

2024: 1,802

6. Total number of VOLUNTEER programs in Argentina:

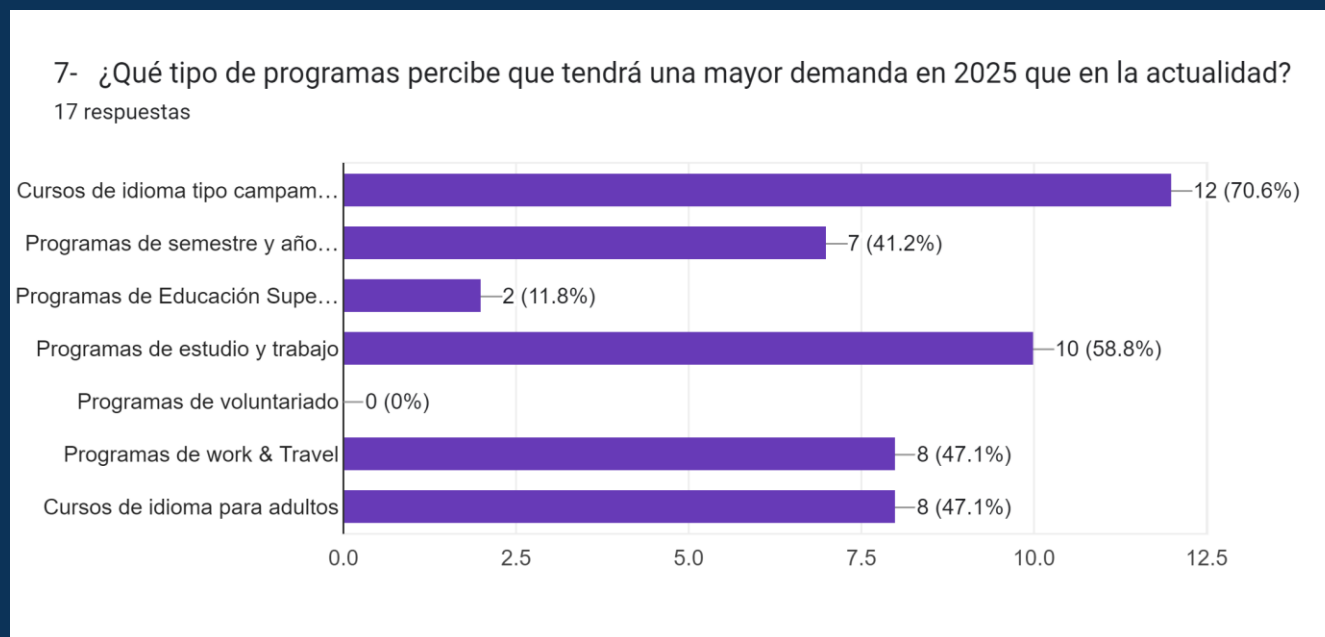
2023: 20

2024: 20

Trends

7. Type of programs our members believe will be more popular in 2025:

- Summer camps
- Study & Work
- Work & Travel/Language courses for adults
- High School
- Higher Education
- Volunteering



Trends

8. Most chosen destinations:

- **UK:** chosen by 13 out of 17 members
- **CANADA & AUSTRALIA:** chosen by 5 out of 17 members
- **IRELAND:** chosen by 4 out of 17 members
- **NEW ZEALAND & USA:** chosen by 3 out of 17 members
- **MALTA & SOUTH AFRICA:** chosen by 1 out of 17 members

Initiatives and Developments

Australian visas are getting more difficult to obtain; long term students opt for NZ instead. The rest of the countries do not pose any difficulty. However, the demand for programs in Canada has decreased, so the number of visa refusals is not so high as it was in the past.

Initiatives and Developments

Talks with New Zealand Embassy in Buenos Aires, which had been closed since the pandemic. The relationship with the Canadian Embassy has cooled down because Canada has become more restrictive.

Achievements

- ABELIO participated actively at many online meetings (FELCA...).
- Regular contacts with local authorities.
- Monthly online Board meetings and AGM in person with all members in May.

Updates

- EF will be excluded from the ABELIO association following internal investigation.

Future

- Business perspectives are moderate. 'Tourism overconsumption' of 2023 is over.
- Belgium had the highest inflation rate in Europe last June, 5.5% compared to 2.5% average in Europe.
- Several agencies experienced a drop of 20% in turnover this year compared to 2023.
- Feeling of young people wanting to organise everything by themselves.

Agencies operating in Brazil:

approximately 800

51

are members of Belta

Top 5 Destinations in 2023

Language

Canada – 18.3%

United Kingdom – 16.6%

United States – 15.9%

Ireland – 8.1%

Australia – 7.7%

High School

United States – 26.8%

Canada – 17.3%

United Kingdom – 16.5%

Australia – 7.0%

Ireland – 6.7%

Higher Education

United States – 23.7%

Portugal – 23.5%

United Kingdom – 16.9%

Argentina – 11.4%

France – 7.3%

According to Belta Seal Market Research 2024, the number of Brazilian students in 2023 **increased by 21.68%** compared to 2022. This proves that the Brazilian international education market continues to grow and recover from the pandemic time.

Trends

- The United Kingdom rose one position and became the second favourite country for Brazilian students according to the agent survey for the main destinations in general, and the USA fell to third place.
- Higher Education programs continue to grow and become popular among Brazilian students.

Visa regime

- BELTA continues to build a strong relationship with several Consulates and Embassies. Canada, US, New Zealand, Australia, UK, Ireland, and Malta among others. BELTA has promoted visa training in partnerships with consulates for BELTA agents.
- Due to new Canadian rules for student visas, Canada lost its hegemony over other countries.
- We can highlight that in the beginning of 2024 we have already promoted 2 exclusive visa trainings for Australia and one for Ireland.

Initiatives and Developments

- **National Online Launch of EI Magazine! 2023** in São Paulo and face-to-face regional launches in 3 cities (Rio de Janeiro, Florianopolis and São Luis) with the support of regional coordinators.
- Distribution of EI Magazine! for parents and students **in the main university** entrance exams in São Paulo - ENEM and FUVEST.
- Meetings: Belta held several meetings with country representatives as well as school associations to stay informed about the situation in each country to receive Brazilian students.
- Social Media: Daily posts on Instagram and Facebook, TikTok account creation, second edition of the streaming event on Youtube and share content on LinkedIn.
- **New market research** from January to December 2023: Brought data on the Brazilian market related to International Education and drew a student profile which has already done the exchange and those who have the will to do it. The survey still helped the BELTA agencies, Collaborator Associates, and entities to better understand the current situation of Brazil and prepare for the current economic scenario.

Initiatives and Developments

- **National Launch of Belta Seal Research 2023** at the Pearson office in São Paulo, with a presentation by professor Danilo Torini and comments by our president Alexandre Argenta. The event was in a hybrid format and had 60 in-person participants and more than 70 online.
- **1st in-person event to resume Study in Brazil** and took place at CCBC (Brazilian Canadian Chamber of Commerce), led by our Operational Director, Antonio Bacelar and Susanna Florissi from Torre de Babel Idiomas e Cultura, member of Belta. The event was sponsored by Air Canada, supported by our partners: AUSTRADE, Education New Zealand, Canadian Consulate, Flywire and ICEF.
- Belta **participate in the main B2B and B2C events in the sector**: Alphe Brazil, ICEF Latin America, ICEF Berlin, The Student World Fair, etc.
- Our president, Alexandre Argenta made **presentation about the Brazilian market** in several international events as Alphe Brazil, CAPS-I AGM, ICEF Latin America, Quality English Mission, and ICEF Berlin.
- Belta, in partnership with the British Council, promoted a **series of zoom trainings** for international education agents throughout Latin America.

Initiatives and Developments

- Belta presented its associates with end-of-year training with specialist Nicola Lutz - on sales and follow-up.
- Belta periodically sends the Code of Ethics to the members so can act more in accordance with good practices of a Belta Seal agency.
- Belta alignment with partners from countries; educational organizations and major international networks of educational institutions to have a healthy relationship for all, noting that the primary concern is the student, with each being responsible for his/her role.

Agencies operating in Germany:

approximately 66

18

are members of FDSV

In 2023:

By your association:

Language Students	Student Weeks	High School Students	University Students
20,000	36,510	N/A	N/A

Overall market growth compared to 2022:

-22%

Top 5 Destinations in 2023

Language	
UK	45.45%
Malta	13.17%
Spain	12.48%
France	9.39%
Italy	5.98%

Trends

- Pre-Covid numbers were reached in 2022. There was a decline in 2023.

Initiatives and Developments

- New ALTO membership, sustainability codex developed, FDSV Guidelines adapted.

Agencies operating in Italy:

approximately **180**

29

are members of IALCA



Italy

felca

In 2023:

By your association:

Language Students	Student Weeks	High School Students	University Students
34,842	86,400	3,700	120

Overall market growth compared to 2022:

4% growth

Top 5 Destinations in 2023

Language	
UK	40%
Ireland	23%
Malta	8%
Spain	5%
USA & Canada	4%

High School	
UK	32%
Ireland	22%
Canada	20%
USA	20%
Spain	4%

Higher Education	
UK	60%
USA	30%



Italy

felca

Trends

- 2023 showed a 4% growth compared to 2022. Growth continues in 2024, slow but steady. The UK attracts the majority of our language students. More than 90% of IALCA students choose an English-speaking destination for their higher education courses.

Visa regime

- Italian students do not need visas for short-term courses to most major destinations.
- Italian students are now used to the fact that they need a passport to visit the UK. But the ETA, Electronic Travel Authorization, could once again have negative effects on the number of Italian students choosing Great Britain as a destination.



Italy

felca

Initiatives and Developments

- Regular zoom meeting, twice a months, with members and guests.
- Regular contact is maintained with the Italian Ministry of Education.
- The 4rd Salone delle Lingue IALCA was held in October 2023.
- In December, 15 IALCA agents together with 15 ASEPROCE agents visited Canada for 12 days, thanks to Languages Canada, CAPS-I and Air Canada.
- IALCA will organise the 5th Salone delle Lingua on 26-28 October 2024, in Rome.

Agencies operating in Japan:

approximately 300

40

are members of JAOS

In 2023:

By your association:

Total number of study abroad students – 66,007 (including online study abroad).

Offline study abroad has recovered to 83% of the pre-COVID 2019 levels.

Offline market growth compared to 2022:

218% increase

Top 5 Destinations in 2023

Online and Offline	
USA	22%
Australia	19%
Canada	15%
UK	10%
Philippines	10%
New Zealand	8%
Other	16%

Trends

- Recovery of traditional and offline study abroad numbers to 83% compared to 2019. And increase of 218% compared to the previous year.
- The top three destinations for Japanese study abroad students are the United States, Australia and Canada.
- Rapid increase in study abroad to Asia. Surpassing 2019 levels as the only region.
- Notable study abroad destinations include Korea, Malaysia and Taiwan.

Future prospects for Japanese Study Abroad Students

- Despite depreciation of the yen and high cost of living overseas, Japanese study abroad students are expected to continue its growth.
- The value of study abroad experiences will increase in the AI era, as real-world experience become more valuable.
- The critical role of study abroad agencies in achieving 2023 500k target.

Agencies operating in Mexico:

approximately 80

39

are members of AMTE

In 2023:

Approximately 55,000 Mexican students studied abroad.

This includes students participating in various educational programs, such as language courses, high school exchange programs, undergraduate and graduate studies.

This number does not include many of the programs for which Mexicans do not need a visa such as summer camps or language programs less than 24 weeks.

Offline market growth compared to 2022:

10-15% increase

Top 5 Destinations in 2023

Language			High School			Higher Education		
Visa Refusal Rate			Visa Refusal Rate			Visa Refusal Rate		
Canada	55%	Less than 5%	Canada	60%	Less than 10%	Canada	62%	Less than 10%
Ireland	19%	Less than 5%	USA	15%	Less than 5%	Australia	12%	Less than 10%
Great Britain	10%	Approx 10%	Great Britain	14%	Less than 5%	Germany	9%	Less than 10%
Australia	8%	Less than 5%	Germany	7%	Less than 5%	Ireland	7%	Less than 10%
USA	5%	Approx 15%	France	3%	Less than 5%	Spain	5%	Less than 10%

Trends

1. Growing demand for Higher Education abroad: Mexican students are increasingly pursuing university studies in countries like Canada, USA, Spain, UK, with more local universities forming partnerships with international institutions for exchange programs and joint degrees. This trend does not help local agencies.
2. Expansion of Language Programs plus professional or personal development: Notable rise in enrolments for English-language courses in countries like Canada and Australia. Students are exploring language programs in non-English-speaking countries like Germany and Spain, combined with professional courses (business, it, cooking, art).
3. Increasing popularity of High School study abroad programs: High school exchange programs are becoming more popular with significant increase in boarding schools. Destinations such as Canada and UK particularly favoured.
4. Stricter regulatory and compliance measures: Growing focus on compliance with stricter visa regulations and quality assurance for study programs. Canada and Italy have changed their process leading to delays and rejections.
5. Increasing interest in non-English-speaking destinations: Countries like Germany, France and Spain.

Visa Regime

General Trends:

- *Increased Compliance Checks*: Across various countries including Canada and UK. Focus on authenticity of documents and financial stability.
- *Stricter Eligibility Criteria*: Includes higher academic and financial requirements leading to longer processing times and increasing rejection number.
- *Enhanced Digital Systems*: Several countries upgraded visa application and management systems, impacting how Mexican students interact with visa authorities, leading to unreliable process and rejections.

Visa Regime

Specific Trends:

1. Canada

- New biometric requirements for student visa applicants from Mexico, including fingerprint and facial recognition data.
- Faster processing times, especially for high-demand programs, to accommodate increasing number of applicants.

2. United States

- More stringent documentation requirements including proof of sufficient financial resources and detailed academic records.
- Extensions in validity period of student visas for certain programs. Students can stay longer for internships and work placements related to their study.

3. United Kingdom

- Changes to points-based visa system, requiring students to score minimum points based on factors like academic qualifications, English language proficiency, financial stability.
- Adjustments to post-graduation work rights – students can stay and work in UK longer after completing studies.

4. Australia

- All student visa holders must have adequate health insurance coverage with stricter compliance checks for health insurance plans.
- Simplified visa application process for certain educational sectors (including language programs, vocational courses)

Visa Regime

Specific Trends:

5. Germany

- New residency permit options for international students to stay in country after graduation to seek employment or start a business.
- Increases in visa application fees, impacting cost for Mexican students applying for study permits.

6. France

- New requirements for integration programs including language courses and cultural orientation, as part of visa application process.
- Reported delays in processing student visas due to increased administrative scrutiny and security checks.

Initiatives and Developments

- Continuous training webinar in various aspects of the industry.
- Open path for members to participate directly with the Mexican tourism secretary.
- Regular meetings between the members.
- 2nd Embassies Event with 9 representatives of the different embassies in Mexico.
- PR agency in main media outlets to fight against fraudulent information in the market.

Agencies operating in Spain:

approximately 400

70

are members of Aseproce

In 2023:

By your association:

Language Students	Student Weeks	High School Students	University Students
30,000	N/A	6,800	425

Total from your country:

Language Students	Student Weeks	High School Students	University Students
55,500	N/A	12,800	2,500

Overall market growth compared to 2022:

-15% decline

Top 5 Destinations in 2023

Language			High School			Higher Education		
Visa Refusal Rate			Visa Refusal Rate			Visa Refusal Rate		
Ireland	35%	N/A	USA	40%	N/A	USA	75%	N/A
UK	25%	N/A	Ireland	28%	N/A	UK	15%	N/A
USA	20%	N/A	Canada	20%	N/A	Others	10%	N/A
Canada	15%	N/A	UK	10%	N/A			
Malta	5%	N/A	France	2%	N/A			

Trends

In Spain, in 2023, the industry has seen a decline of around 15%, mainly due to a significant drop in Summer Programs, which are down 30% from 2019 levels. Mini-stays, however, are showing signs of recovery.

Visa Regime

In 2023, all restrictions have disappeared, with only the usual request for study permits and student visas remaining.

Initiatives and Developments

- Represent and defend the interests of the companies that promote the Language Courses Abroad.
- Being a professional employer and a mandatory reference of the sector with national and international institutional presence and recognition of customers.
- Promote and ensure compliance with quality systems that benefit the image of the profession and the interests of customer.

Norma Aseproce:

- In 2023 we started the 7th campaign to obtain the ASEPROCE STANDARD certification, which ensures the quality management system of the associated companies. We started a new cycle (2023/24), adapting the checklists to the new situation in order to adjust to the new needs and expectations of the client/student, with 3 focuses:
 1. **Compliance**: New legal requirements in the hiring of monitors
 2. **Client**: Measure their satisfaction
 3. **Digitization**: Monitoring digital impact

Initiatives and Developments

Creation of a framework contract between agencies and schools:

- Aseproce organised a working committee with several member agencies to create a framework contract between agencies and schools. This document was developed through collaborative efforts to ensure it meets the needs and standards of all parties involved.

Aseproce presents its new corporate identity:

- Aseproce has introduced a new corporate identity, revamping its image for the association. This includes a refreshed logo and a change of office location, marking a new era for Aseproce.

Fam trip in Canada:

- Aseproce organised a fam trip in Canada, in collaboration with Languages Canada and CAPS-i. This initiative saw the participation of 15 agencies from ASEPROCE and 15 from IALCA, fostering international cooperation and exchange.



Taiwan

felca

Agencies operating in Taiwan:

approximately 450

135

are members of IECA



Taiwan

felca

University Students (holding student visas to stay in those countries) by destination

Destination	Number of Students	% of your students
USA	11,324	31%
Japan	5,068	14%
Canada	4,930	14%
Australia	4,386	12%
UK	3,545	10%

Overall market growth compared to 2022:

7.06% increase



Taiwan

felca

Top 5 Destinations in 2023

Language
Canada
Japan
USA
UK

High School
Canada
Japan
UK
New Zealand

Higher Education	
USA	38%
Australia	19%
Japan	9%
Canada	7%
UK	6%



Trends

- The US is still very popular for students to study abroad.

Visa Regime

- It is harder to get VISA or it takes a long time to wait, which will be an ordeal for students.
- Students are looking for a country that will extend their VISA after finishing the studies so they can stay and find the opportunities for work.

Initiatives and Developments

- IECA continues to have several meetings with the Ministry of Education to revise the standard service contract. The visa seminars are updated from time to time as usual.
- IECA successfully hosted multi-national fairs since 1994. The Spring Fair expanded to 60 booths in 2023 and organizing the Autumn Fair this October.

Agencies operating in Turkey:

approximately 290

34

are members of UED

In 2023:

By your association:

Language Students	Student Weeks	High School Students	University Students
8,200	17,200	310	4,010

Total from your country:

Language Students	Student Weeks	High School Students	University Students
15,700	168,400	600	5,500

Top 5 Destinations in 2023

Language			High School			Higher Education		
Visa Refusal Rate			Visa Refusal Rate			Visa Refusal Rate		
UK	57%	10%	UK	50%	0%	UK	30%	10%
Ireland	10%	40%	Canada	30%	0%	Canada	25%	20%
Canada	10%	30%	USA	5%	0%	Germany	15%	5%
Malta	8%	30%	Other	15%	3%	Italy	7%	10%
Other	15%	10%				Poland	6%	8%
						USA	4%	5%
						Netherlands	4%	0%
						Hungary	4%	17%
						Other	5%	5%

Trends

- The market is up by 37%
- The most preferred destinations for (language studies) are UK, Ireland, Canada, Australia, Malta and the UAE for English.
- The most preferred destinations for (Secondary Education) are the UK and Canada.
- The most preferred destinations for (Higher Education) are Germany, the UK, Canada, Germany, Italy, Poland, the USA, the Netherlands, Hungary, Ireland, Belgium.

Visa regime

- The EU national visas are issued but due a lack of appointment slots and long visa process times, students struggle.
- US visa appointments are given usually 18 months later only secondary and higher education visas are priorities for an earlier visa appointment. No support for language students.
- UK visas running as usual. The visas are processed in Istanbul but also in Sheffield Office. Refusals are mostly coming from Sheffield Office. The case officers in Sheffield are not well-trained for Turkish documentation.
- At the end of 2023, the Irish consulate broke its visa refusal record. Due to the 50% visa refusal, many agencies gave up promoting Ireland.

Initiatives and Developments

- UED Summit 2023 was held 20-22 October 2023 with 11 partner institutions and UED members participating.

FELCA Europe Report, August 2024



January 2024, Alphe Malaga: 1st meeting in person

- Topics discussed: The European Norm: EN 14804-2005, the possibility to work with a lobbying company, the idea of a European Certification of Study Abroad Counsellors, new potential association members, negotiate with the EU to have a special category for educational agencies different from travel agencies.

May 2024

- Contact with UNOSEL (France) see whether they would be interested to join FELCA. They declined for now.

FELCA Europe Report, August 2024



July 2024

- Meeting with Euralia, lobbying company based in Brussels, to explore opportunities to work together.
- Estimated budget for services: €10,000.
Could FELCA partly finance it while giving the equivalent amount to Asia and South America?

Action	Services Included
Identification of opportunities for funding	Mapping of the opportunities adapted to FELCA's members characteristics. Follow up of the publication of the calls and information about their formal requirements in due time.
Influence communication/lobbying	Drawing up a mapping including an identification of officials, stakeholders, influence leaders, etc., and their positioning on FELCA's areas of interest; <ul style="list-style-type: none">• Becoming visible of the European institutions:<ul style="list-style-type: none">- Drafting a position paper.- Organising a day of meetings and following-up.

felca

ST/STUDYTRAVEL

Thank you for your time!