

National Report for FELCA AGM – 2017

YOUR ASSOCIATION NAME: IALCA

COUNTRY: ITALY

AGENTS numbers in your country

Approximately, what is the total number of agents operating in your country? **350**

How many of these agencies are members of your association? **19**

Markets

Please estimate the following:

| | By your association | Total from your country |
|--|---------------------|-------------------------|
| ▪ total number of language students in 2016 | 38.800 | N.A. |
| ▪ total no. language student weeks in 2016 | 128.000 | N.A. |
| ▪ total number of high school students | N.A. | N.A. |
| ▪ and university students | N.A. | N.A. |
| ▪ did the overall market grown or decline from 2015? | +5% | |

Top 5 destinations for your members in 2016 and % of the market of each

| | <u>Destination</u> | <u>% of your students</u> | <u>Visa refusal rates%</u> |
|---|--------------------|---------------------------|----------------------------|
| 1 | UK | 54% | |
| 2 | Ireland | 19% | |
| 3 | Malta | 7% | |
| 4 | USA | 7% | |
| 5 | Spain | 3% | |

Trends in student numbers explained

On average Ialca's agencies reported a 5% increased in number of students in 2016 compared to 2015. The UK recovered almost all the percentage points lost in 2015 (+5,5%) due to the cheaper pound after Brexit. And Brexit has had little negative impact till now.

UK was by far the most popular destination, as it is English is by far the most popular language.

Ireland continued to slowly grow, perhaps attracting students who chose to study in safer destinations. Malta recorded a little decrease (-2%). USA was still the most attractive destination outside Europe, though decreasing a bit (-1%), while Canada has been growing (2%).

Spanish in 2016 has been the second most popular language, with Spain dominant destination (95%)

Visa regime – any new developments?

Italy does not need visas for short term courses in most of the target destinations.

The agents in Italy are carefully monitoring what could happen in the UK after Brexit for long term and University students.

Initiatives/Developments for your association?

Ialca participated in a number of events: EduCanada in Rome and Milan; Quality English Workshop in Milan; to the English UK Annual Conference and AGM, with a skype presentation on PON scholarships.

On of the most important issues for Ialca during 2016 has been trying to influence the Ministry of Education in order to draw a framework of guidelines for the several scholarships granted in Italy (PON, Insieme and Itaca). Ialca is also collaborating on several common points with ASTOI, the Italian Association of Tour Operators.

What benefits do you offer your members?

Sharing information, meetings with schools, fam trips abroad.
Direct contacts with Italian and foreign institutions

When is your AGM?

Ialca has two main meetings during the year, one early spring and one in autumn.
Next AGM will in October 2017.

Which consulates do you have close ties with? (web addresses)

Felca Agency Accreditation Code

Please confirm that your members' brochures/websites have now been checked against the Felca Accreditation Code. **YES**

The Felca logo needs to be distributed to all your agency members and included on their brochures, business cards and websites. Has this been done? **YES**