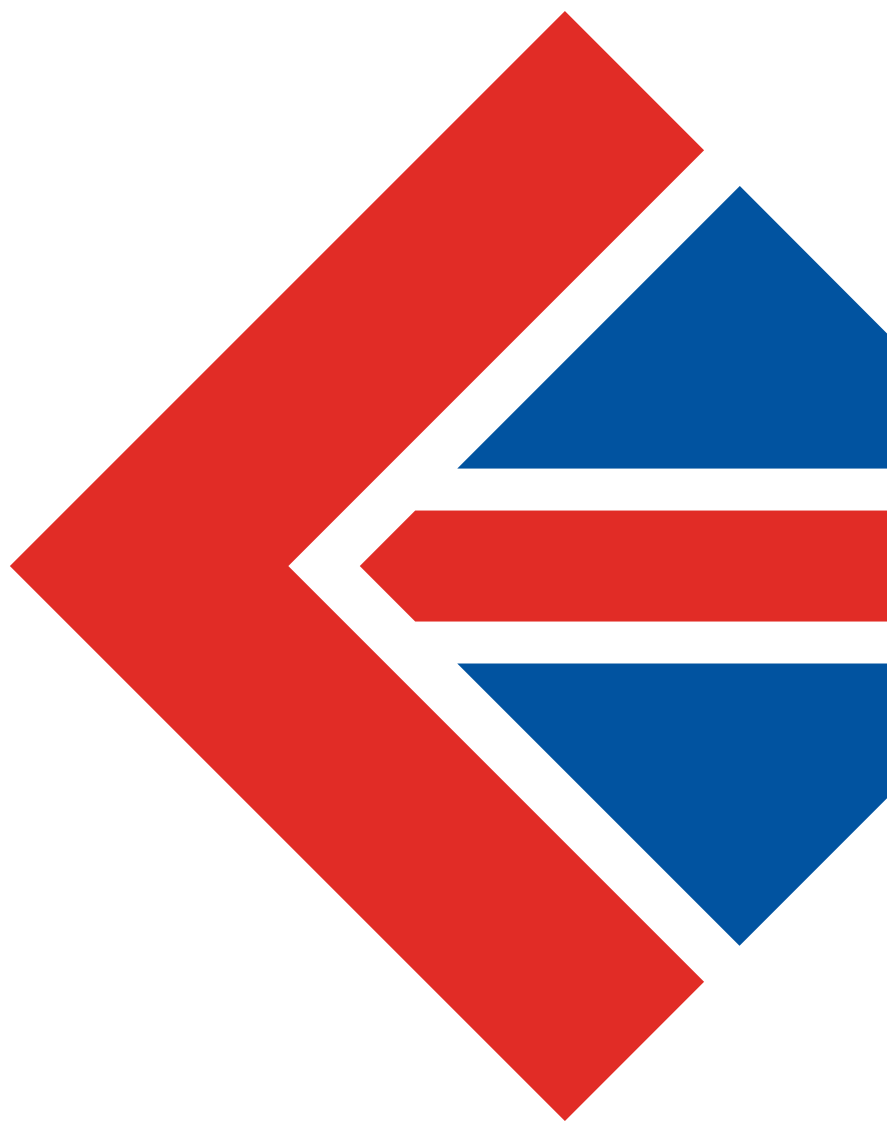


ENGLISH UK SCOPING VISIT TO ARGENTINA

October 2009



Executive Summary

Argentina is a highly urbanised society- it has a population of 38.5 million, 89% of whom live in towns and cities. The capital is Buenos Aires, with a population of 38.5 million, followed by Cordoba with 1.3 million, Rosario with 1.1 million, and Mendoza with 0.7 million people.

Argentina achieved GDP growth of over 8% between 2004 and 2008- the highest in Latin America. However, 2009 brought new financial difficulties, and the GDP growth rate is estimated to have dropped to between 0 and 2%. Nonetheless, GDP remains amongst the highest in Latin America (the IMF figures for 2008 GDP record that the country fell behind only Brazil and Mexico).

The country has high educational standards in comparison to many of its Latin American neighbours. It has a 92% enrolment in primary education, and a 96% literary rate overall. There are 41 national state universities in the country, and 50 private universities.

There are 4.8 million students of English as a foreign language in Argentina. ELT provision in schools is good- there are 100 main private bilingual schools which usually opt for ESOL examinations. There is also a government drive to improve standards of ELT in the state sector- the Ministry of Education announced that from 2009, ELT will be compulsory from the first grade in state schools in Buenos Aires. (Previously this had only applied to the fourth grade and above).

English Language skills are considered important in Argentina, and the country provides a good potential market for UK ELT providers. Discussions with agents revealed that demand for overseas ELT falls into two distinct categories- General and Intensive English courses lasting 2-6 weeks (usually for students aged between 16 and 25), and Business English and English for Specific Purposes courses for young professionals (aged 25-40).

The General and Intensive courses are in demand because normally those who can afford study and travel already have reasonable levels of English- they have often attended private schools, many of which are bilingual. The UK is a popular destination because of its proximity to the rest of Europe- many Argentine students are motivated more by a desire to travel and explore different cultures than the desire to perfect their English language skills. Indeed, this has led to an increased competition from destinations such as Australia and New Zealand for students within this category- both countries are often perceived to be more relaxed and 'fun'.

However, parents have a strong influence over the final decision on which country the student will select, even for young adults, and this helps the UK market. The UK has a distinct competitive advantage in terms of reputation for quality- British English is very prestigious, particularly among the older generations. There is a perception that 'serious' students would choose the UK over competitor destinations such as New Zealand or Australia, and that teaching standards are highest in the UK. This means that parents often overrule their childrens' requests and insist on the UK or the USA. ELT training is seen as an investment, and parents who are paying for their children's courses expect to see evidence of a dramatic improvement, so examination courses are very popular. Overall, expectations of UK ELT are very high.

The second category of ELT courses popular in Argentina is Business English or English for Specific purposes. The worldwide financial problems led to redundancies in the commercial sector and a reduction in the number of companies willing to fund overseas English language training for their employees. Whilst

this has meant that fewer companies are funding ELT training, it has not resulted in a significant reduction in the demand for business English courses overall. There is a trend whereby business men and women who are unemployed as a result are self-funding their courses in order to improve their prospects in an increasingly competitive job market. Agents also noted that it was increasingly common for people who own and run their own businesses to travel abroad for ELT. It is important to add that potential students of this type have extremely high expectations and demand the highest standards of teaching, accommodation, and ICT facilities.

During meetings, agents expressed some concerns about the lack of contact that they receive from UK schools. They emphasised the fact that it is very important to be 'seen' in the market, and that it is important to maintain regular face-to-face communications with business partners. The performance of the UK in terms of provision of marketing materials and attendance at education fairs and events in Argentina compares badly to that of competitor markets. Much reference was made to the success of Australia and New Zealand in this respect.

UK Border Agency Entry Clearance Statistics – summary of student applications for Argentina (Buenos Aires)

	Received	Issued
2007 - 2008	215	210
2006 - 2007	230	225
2005 - 2006	173	168
2004 - 2005	149	146
2003 – 2004	129	125
2002 – 2003	127	117
2001 – 2002	95	72

English UK Annual Return Statistics (Private Sector Member Centres)

Number of student weeks for Argentina (one student week is defined as one student taking 10 or more contact hours in one week)

2008 (332 centres)	2007 (279 centres)	2006 (262 centres)	2005 (249 centres)	2004 (243 centres)	2003 (220 centres)	2002 (207 centres)	2001 (186 centres)	2000 (192 centres)
7392	6311	4352	4808	4501	3599	5295	9582	10088

MEETINGS

Monday 26 October 2009

Meeting with Mary Goodward, Manager, and Calum Mcglaggan, Projects Manager, British Council Argentina

The British Council in Argentina has recently been restructured, which has resulted in the 'neglect' of the education section. All contact with students is now done by telephone, and the BC are still happy to advise students in this way. It was noted with regret that the BC in Argentina now has very little contact with agents, other than requests for advice on interpreting terminologies. The department has a Spanish section on their website with '10 questions' aimed at helping students and parents select schools and courses. The BC emphasised the crucial role that parents play in choosing a country and language school, and pointed out that the UK continues to be seen as the best choice in terms of quality.

Mary and Calum also noted that the parents are less comfortable with internet advice than their children. It is important that the parents feel that they are in control, even where young adults are concerned. However it is becoming increasingly common for Argentines to make direct bookings online, although it is likely that they would only do this if they were following the recommendation of a family member or friend.

The BC emphasised the importance of trade fairs for raising profiles and maintaining business relationships, particularly with agents. They mentioned that they would be happy to promote UK ELT on behalf of EUK at fairs in Argentina in the future (particularly at Expo Universidad in 2010. It was suggested that EUK provide banners, tablecloths and brochures to be displayed there). The British Council are currently in the process of trying to arrange B2C fairs in Argentina to coincide with AREI Chile, but funding for this has not yet been confirmed. Once this is finalised, they would be very keen to include English UK members.

www.britishcouncil.org/argentina.htm

Meeting with Solange Perez Barriggi, Partner, and Nora Bariggi, Director, Euroamerican Educational Group

Euroamerican Educational group is owned and run by the mother and daughter team of Solange and Nora Bariggi. It was set up in 2000 and specialises in sending students for General English courses, lasting on average 1 month (most potential students already have a reasonable level of English). They have sent approximately 100 students overseas each year for 2008 and 9- this has fallen from around 300 students a year during better economic times. Approximately 5% of these students are sent to the UK.

The agency sends the majority of their students to the USA- in spite of the fact that it is seen as more 'standard' and lower quality, because it is also thought to be significantly cheaper. The USA is closely followed by Canada, which is becoming increasingly popular, but they are also receiving more and more enquiries about studying in Australia and New Zealand. These two countries have dramatically increased their levels of marketing over the last year, and have particular appeal for the youth market. However,

these enquiries are unlikely to follow through, due to the high levels of travel costs, and unwillingness of parents to fund trips to destinations that are seen as holiday locations. The most popular courses are General and Intensive English, and for younger students, examinations are important so that parents have some evidence of their investment. Contractions within the job market have caused a small increase in demand for English for Specific purposes, although these are largely self-funded.

The agency reports that when Argentine students and parents are selecting a country and school, cost is currently the most important factor. The UK is seen as very expensive, although this is not totally prohibitive because of its reputation for excellent standards (and therefore a better return on investment). Recommendations from friends and family also play a crucial role in influencing the choice of destination, although many students will arrive at the agency without doing much research beforehand and are happy to follow the advice of agents.

Solange noted that the agency felt that it had lost contact with/ been neglected by the UK over the last couple of years, which had led to a reduction in the number of students travelling there. Personal relationships are important to Argentines, and the agency is keen to develop working relationships with the UK in the future, so that it does not feel so remote.

www.euroamericangroup.net

Meeting with Marcela Serra, Passport Idiomas

Passport Idiomas is a relatively small agency based in the province of Cordoba and sends on average 60 students a year to study abroad (about a quarter of these are sent to the UK). Again, the most popular courses are General or Intensive and the average course length is 4-8 weeks. A few select longer courses of 4-5 months, but this is unusual, as most have a pretty good level of English already. Marcela noted that South Africa, Australia and New Zealand are becoming increasingly popular because of the weather and excellent marketing campaigns, and consequently, there has been a shift away from the UK which was traditionally the strongest market. However, parents only want to pay for educational trips so there is some conflict between the parents' choice (the UK) and the students' demands (Australia or New Zealand).

Marcela was only aware of English UK through communications about StudyWorld. She mentioned that after 2001, most UK schools stopped coming to Argentina, as it wasn't perceived as a good market. It is still seen as unsteady in spite of recent improvements, which she feels has put some schools off investing money and effort in the country. She went on to emphasise the importance of face-to-face meetings with potential partners and indicated that she was unlikely to work with a school that she had not met with personally. She added that this was particularly important in the provinces (such as Cordoba), where parents are also keen to meet school representatives before agreeing to send their children overseas. The high profiles of Australia and New Zealand have been supported by the fact that they run seminars in offices and schools, keep in contact, and pay for shared advertisements in local newspapers. Marcela indicated that the agency would be happy to help UK institutions to arrange similar school visits or presentations in Cordoba.

www.passport-edu.com.ar

Meeting with Alicia Ciocca, Global Studies

Global Studies sends an average of thirty students a month to the UK. Typically, they study general English courses for between 2 and 4 weeks, and already have a good standard of English. However, the agency has noted an increase in demand for Business English and English for Specific Purposes amongst Argentines, and is looking to expand in this area in the future. Recently, these executives tend to be self-employed and/or self funded rather than having courses paid for by their employers. This could benefit the UK market, as big US companies usually choose to send employees to the USA to learn American English instead.

Global Studies has traditionally promoted the UK as providers of the highest quality ELT. Although clients are initially put off the UK because of the high cost, it is easy to convince them otherwise (although there has been a slight increase in the number of students choosing the USA in the last 12 months). Alicia indicated that her clients, particularly executives, are willing to spend a lot of money, but expect excellent facilities and a significant improvement in their English in return. Agents have a lot of influence over the final decision, and word of mouth is also crucial.

Alicia also noted that contact with UK institutions has diminished over the past couple of years. She is keen to receive information from UK schools on a more regular basis, especially brochures and newsletters via email.

Meeting with Veronica Ferrayra, Interlatina

Interlatina specialises in activity courses- study combined with sports- skiing or climbing, for example. They send 300 students overseas each year, and about 50 to the UK. Overall, student numbers are gradually increasing, and there is a large increase in demand for such programmes in Australia and New Zealand. The agencies' clients are described as fairly privileged- language skills are perhaps secondary to the desire for adventure, but they are compelled to take on some form of study so that their parents will pay. Language travel is seen as a good option because they recognise that they will learn faster with immersion.

Veronica noted that the USA and Canada are becoming increasingly popular destinations for ELT, and that Australia and New Zealand would cause much greater threats to the UK industry except for the high costs of flights which are prohibitively expensive for short courses. She also agreed that the UK has an excellent reputation for quality, and that students who do choose the UK are generally more serious about study.

Veronica would welcome information (via email) from schools that have something suitable to offer.

www.interlatina.org

Meeting with Maria Eugenia Papasergio, Grasshopper International

Grasshopper has sent over 300 students overseas from Latin America in the past year, but has only just set up the Argentine branch (in May 2009). This was based on the fact that they identified a gap in the market in Argentina, and predict a steady increase in the number of students studying abroad in the future.

Maria again mentioned that the demand tends to be for short courses- Argentine private education is often bilingual; therefore there is not much demand for long courses amongst those who can afford to study abroad. The USA is usually the first country to be considered by Grasshopper's clients, because many have relatives there. Once people realise that the costs associated with the US and the UK are similar, they usually select the UK which is seen as better quality and better for travel opportunities. This is particularly relevant in Argentina, where there are strong ties with various European countries. Maria also indicated that more good quality, good value courses can be found in the UK than in the US.

Maria suggested that the gradual improvement in economic stability will lead to an increased investment in overseas education, and that due to recent crashes, parents want evidence of a 'return' if they pay for a child's education. Exchange rate fluctuations have also led to caution, as people don't know if they will be able to fund study if there is a dramatic change whilst they are overseas.

Finally, Maria mentioned that Grasshopper would be happy to help schools organise presentations or seminars for potential students in schools in Argentina. These generally target students looking for something for their long vacation or at the end of the final year. Grasshopper has found that this type of programme has been very useful in terms of student recruitment (she has successfully run some for a Canadian school) because both students and parents are keen to meet a representative from a school as well as just an agent.

www.gi.com.co

Meeting with Mercedes Pepi Lascano, Coined International

Coined International has identified Argentina as a market with a lot of growth potential for UK ELT, and has offices throughout Argentina. They recruited over 100 students from Argentina last year, and next year aim to send at least 10 students a month to study in the UK.

They highlighted the fact that the ability to study and work is important to Argentine students planning to study abroad, and accounts for the popularity of competitor destinations. Cheap courses are also particularly crucial- finances have come to the forefront following the recent economic problems. The situation has been steadily improving since the 2001 crash, but is still fairly uncertain.

In terms of student recruitment, Coined works very closely with the University in Cordoba, where they hold meetings and briefing sessions for students interested in studying abroad. Mercedes thinks that it would be very beneficial to schools hoping to recruit students from Argentina to take part in these events.

www.intercoined.org

Meeting with Marianna Padilla, ETS

Marianna runs a language centre for executives in Argentina. The centre specialises in in-company language training for big business, and has over 600 students annually. Marianna now wants to expand and start sending students overseas to study. The clients used to focus on the US (Citibank was one of the biggest clients). There is an increase in the interest in the UK, which is seen as more 'serious'.

They have already been sending students to the US, but are keen to develop relationships with the UK, as they feel that the quality is higher. Marianna indicated that that the US has less provision for business-specific courses and is less willing to tailor to the needs of individual students. The UK also has a competitive advantage in that there are fewer Latinos there- clients are less likely to have family there, and are consequently more likely to appeal to the serious business-driven market.

ETS recruits directly through companies rather than individuals. Clients are top managers- they want the fastest improvement in the shortest time- they are very willing to work very hard to achieve this.

Appendix

Please find the following two reports in the appendix:

- 1. British Embassy Buenos Aires – Postcards from Argentina: Education & Training**
- 2. British Council – a report on student decision making in Argentina 2007 (data from the British Council’s online global student decision making survey)**

Postcards from Argentina: Education & Training



The Sector

- 92% enrolment in primary education; 96% literacy rate
- 100 main private bilingual schools
- 41 national state universities & 50 private universities
- 4.8 million students of English as a foreign language
- 2009 - ELT is obligatory at state schools of the city of Buenos Aires from 1st grade (primary school).
- 2008/2009 - Ministry of Education provides 30,000 grants on scientific & technical university studies: a priority sector
- Positive perception of the UK education industry's level & quality with several UK educational companies established

Main opportunities

- ELT primary level programmes and educational material (books, software)
- VET testing and experimental equipment, ICT.
 - Corporate training
 - Postgraduate level training supplies
 - Special Needs Education material
 - Joint ventures and technology transfer with local institutions to meet the rising local demand for quality and diversity of courses



Argentina feels very familiar; almost European.

It's got real business opportunities as well as tango, football, wine and beef.

British companies and their products & services are well respected and valued for their quality and innovation.

It is a huge country; 11 times larger than the UK with a population of 40m.

It is modern, educated and sophisticated too. Lots of cutting edge service providers like Microsoft and Google are based here.

The economy is doing OK; 6 years of more than 7% growth. Took a dip in 2008/09 with recovery forecast for late 2009.

Return address

Marisa Leoncini, British Embassy Buenos Aires
☎ 0054 11 4808 2270 ✉ marisa.leoncini@fco.gov.uk



Fresh thinking

A report on student decision making in Argentina 2007

<https://secure.britishcouncilstats.org/sdmr/home.page>



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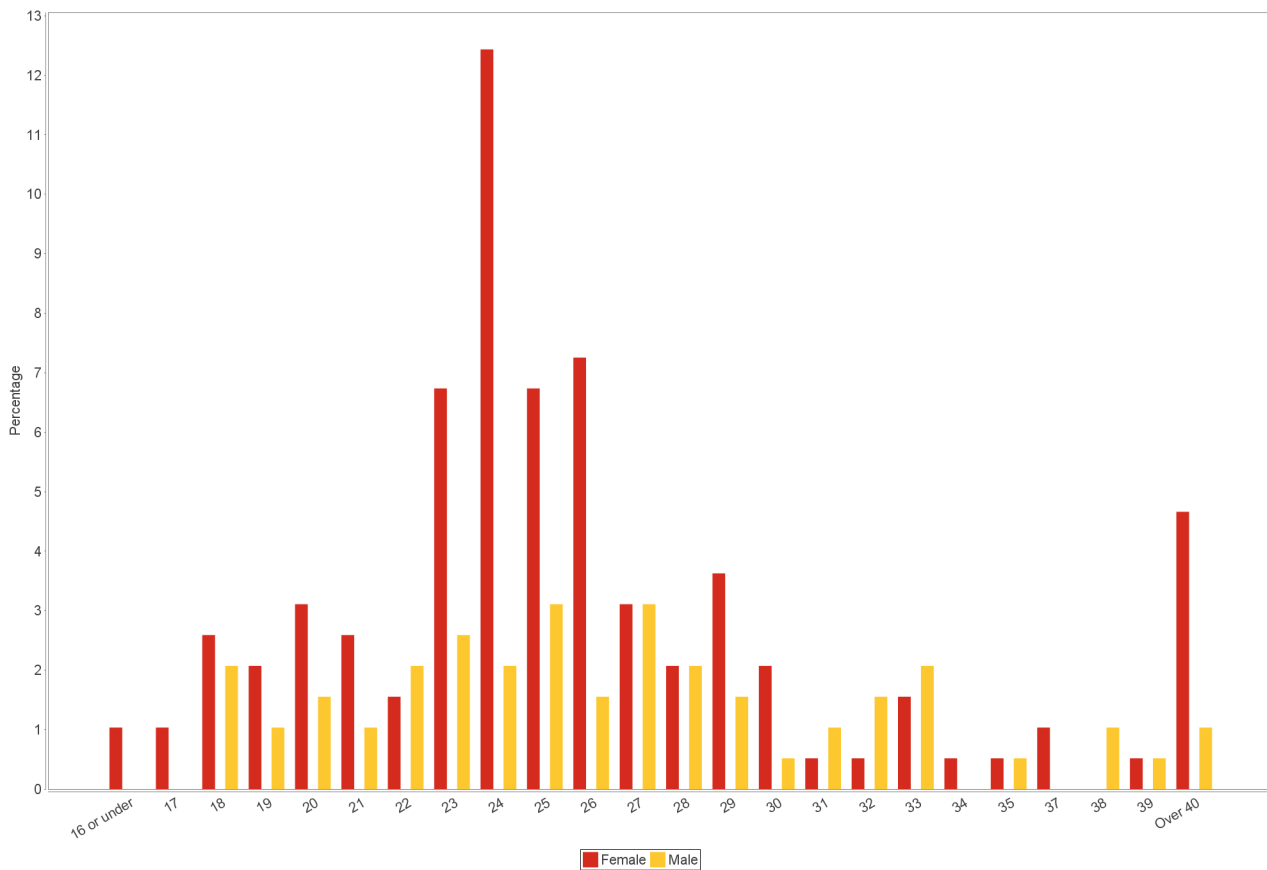
Section	Page Number
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Current occupation-Argentina 2007	4
What type of course are you considering-Argentina 2007	5
How long from now do you intend to undertake the course-Argentina 2007	6
In what areas of study are you most interested (HE)-Argentina 2007	7
In what areas of study are you most interested (Pre HE)-Argentina 2007	8
Factors influencing decision to study overseas-Argentina 2007	9
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Argentina 2007

Age and gender

Amongst prospective students from Argentina, 68% were Female and 32% were Male.



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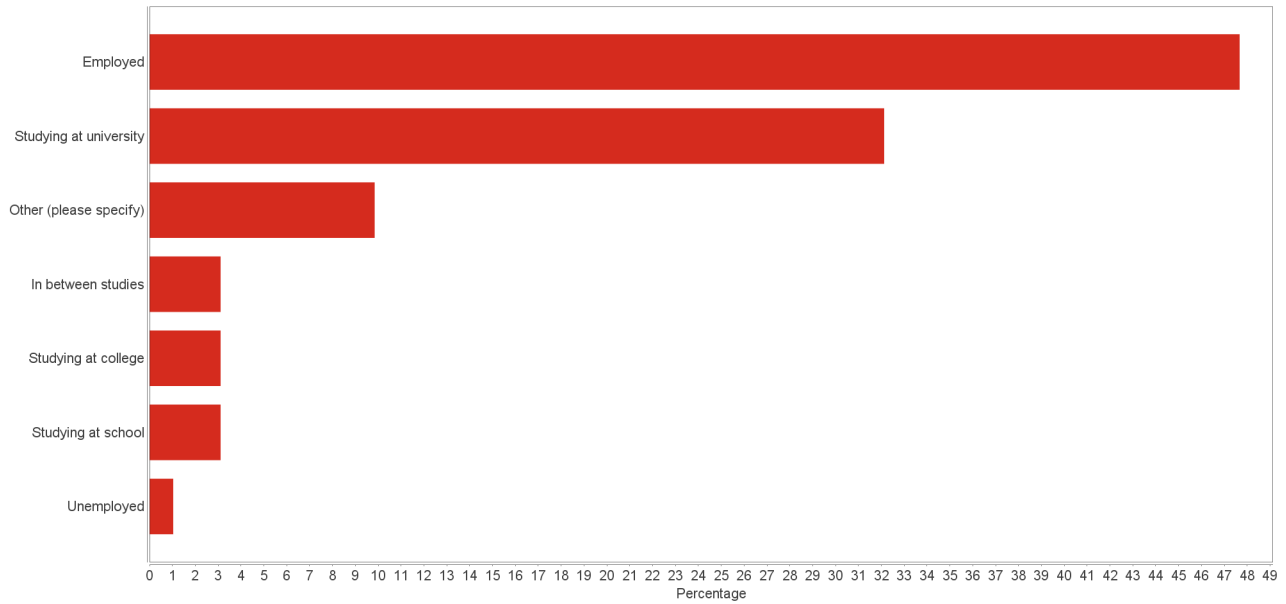
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Argentina 2007

Current occupation

Most prospective students (48%) are Employed.



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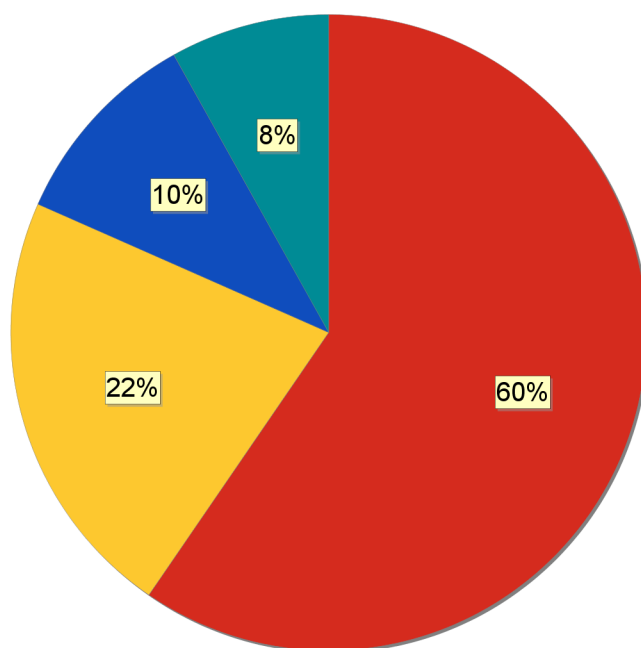
Argentina 2007

What type of course are you considering

The most popular course type was Higher education (bachelors degree, Masters, Phd., MBA etc.) which 60% of prospective students are interested in studying.

Filter:

Those looking to study overseas only.



■ Higher education (bachelors degree, Masters, Phd., MBA etc.)
■ Pre-University course / A-Level / Foundation course / Vocational qualification / Other ■ English language
■ Professional Award (eg. ACCA etc.)

Base: 136

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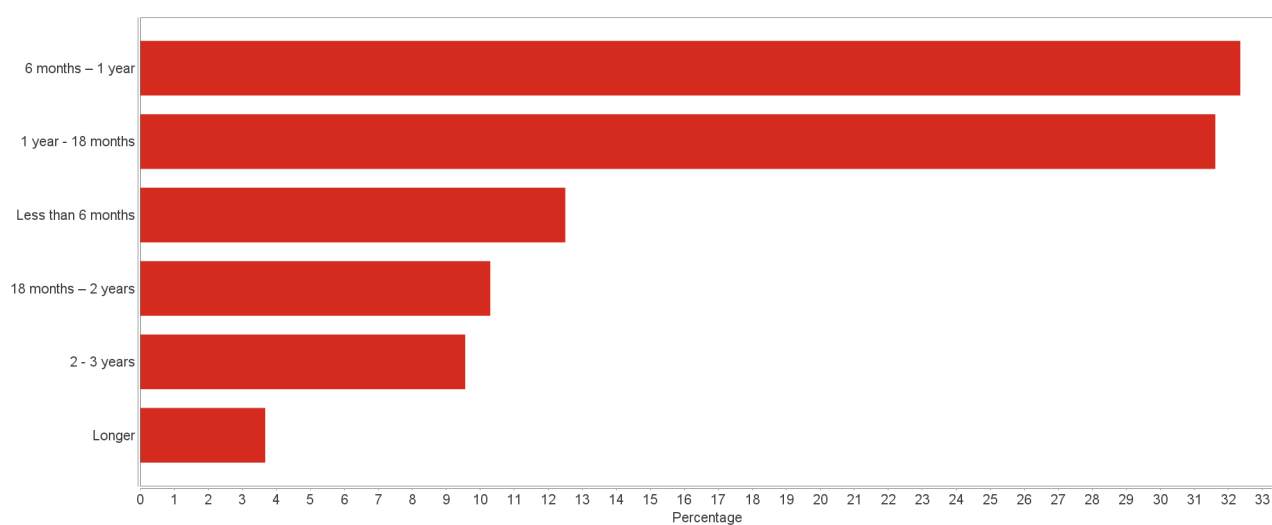
Argentina 2007

How long from now do you intend to undertake the course

45% of respondents intend to start the course in the next 12 months with a further 32% planning to start in the next 12-18 months.

Filter:

Those interested in overseas courses only.



Base: 136

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Argentina 2007

In what areas of study are you most interested (HE)

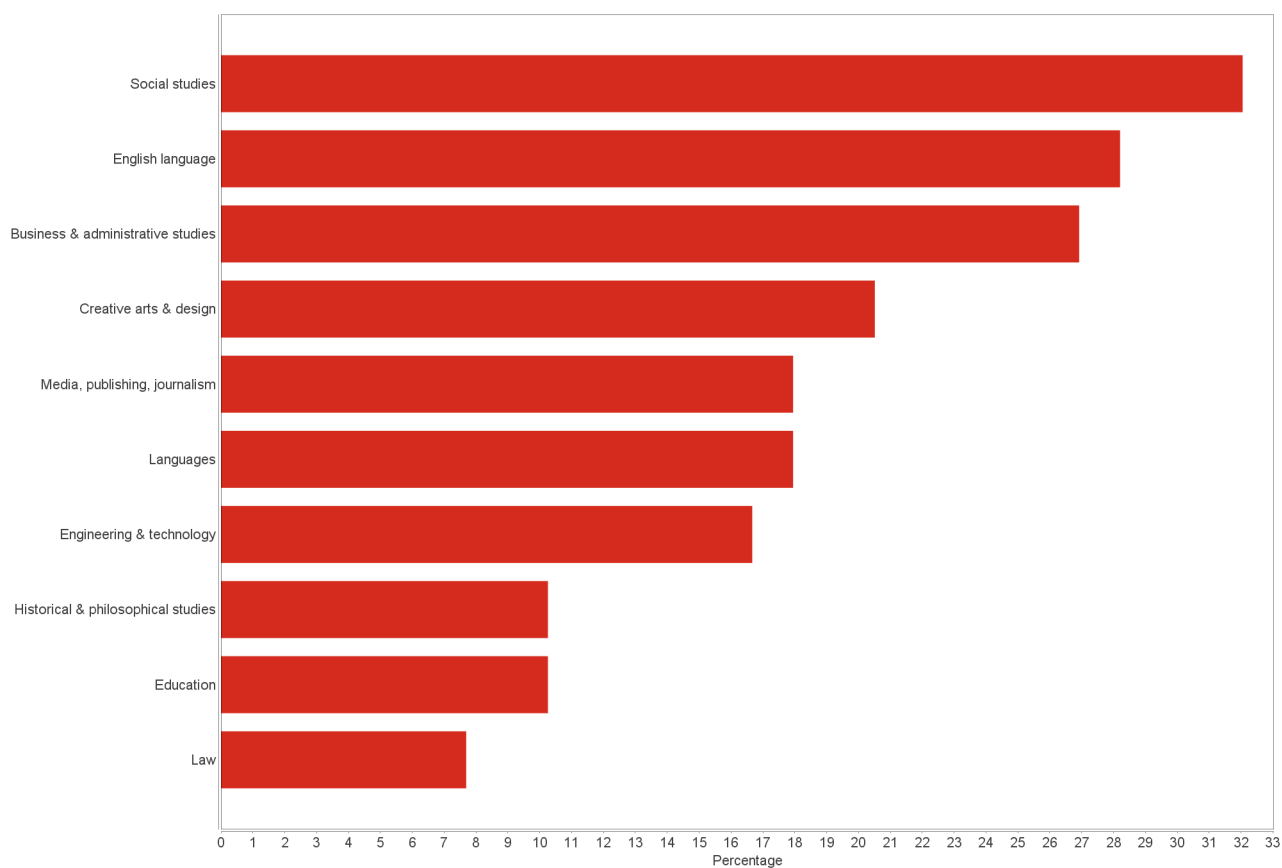
The three most popular subject areas were Social studies (32%), English language (28%) and Business & administrative studies (27%).

Filter:

Those interested in overseas HE courses only.

Respondents could select multiple answers.

Top 10 results only are shown.



Base: 78

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Argentina 2007

In what areas of study are you most interested (Pre HE)

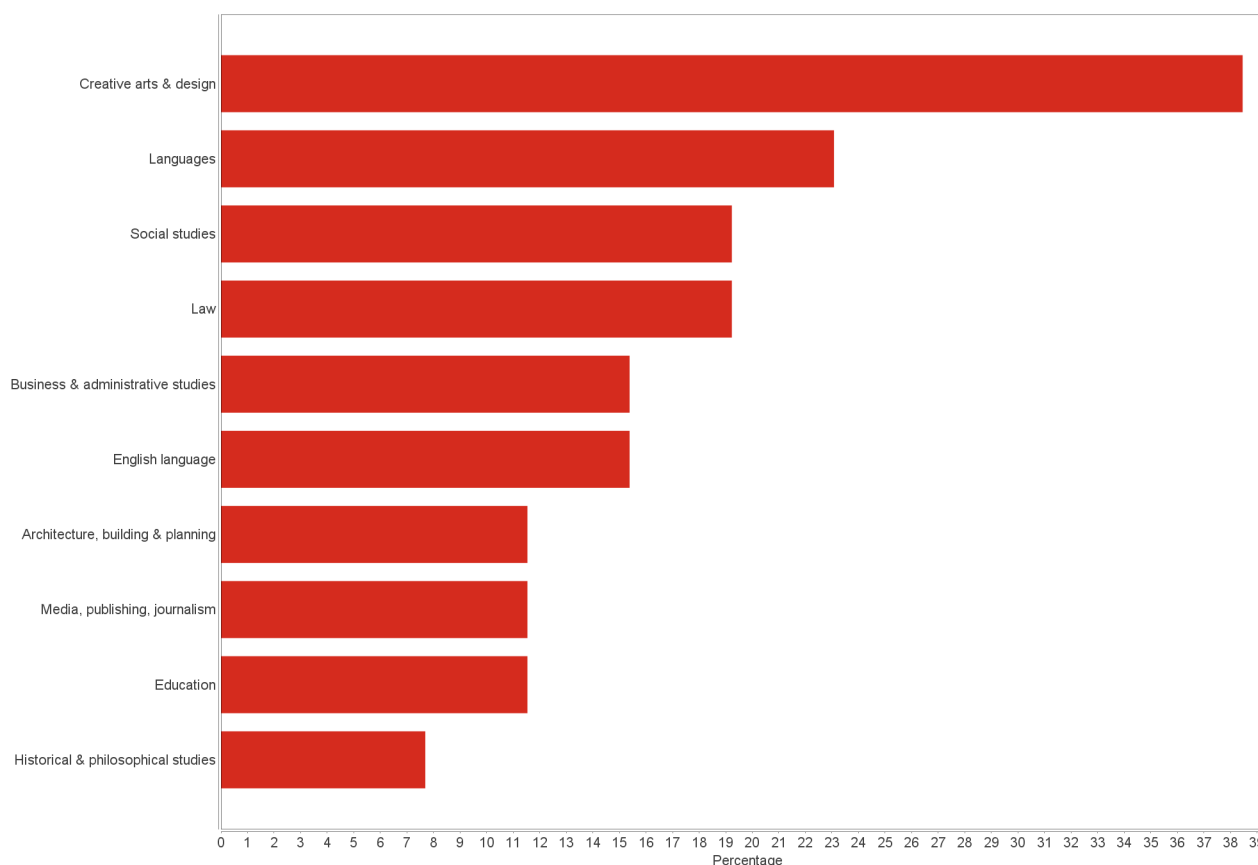
The most popular subject areas were Creative arts & design (38%), Languages (23%), Law (19%) and Social studies (19%).

Filter:

Those interested in overseas pre HE courses only.

Respondents could select multiple answers.

Top 10 results only are shown.



Base: 26

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Argentina 2007

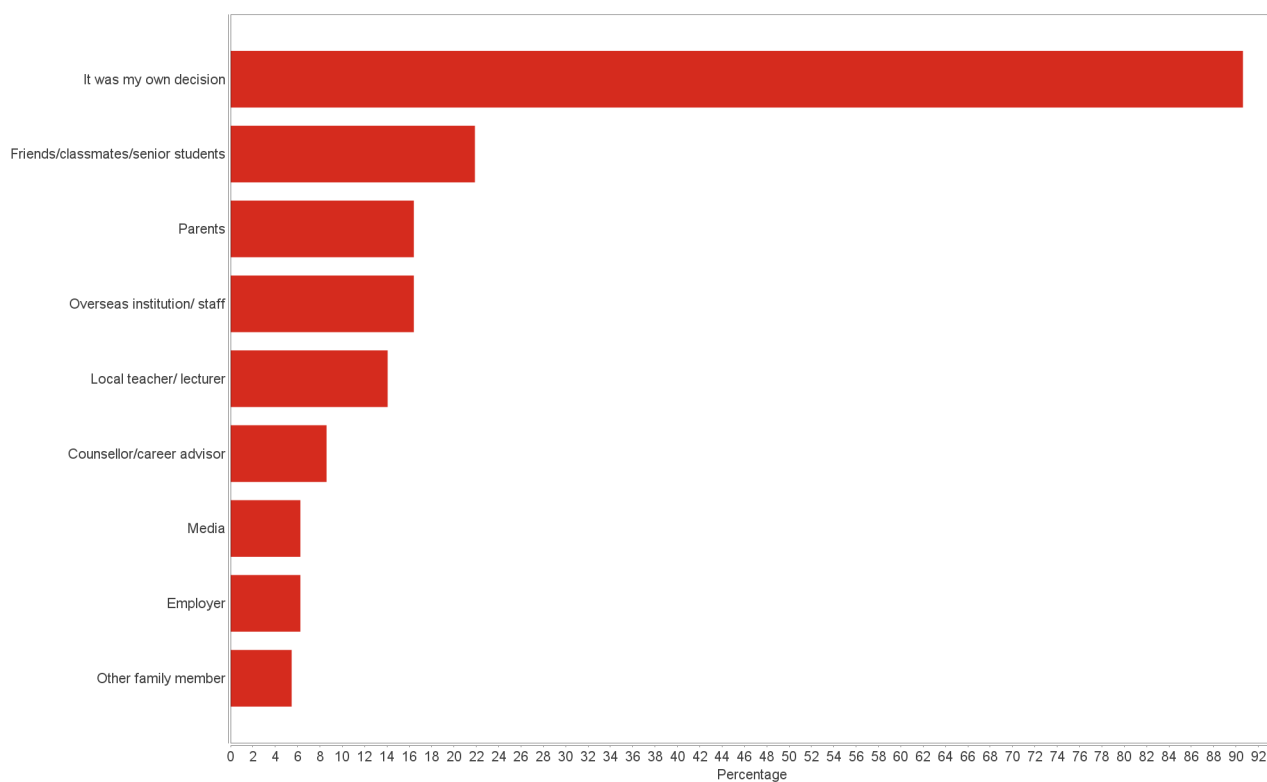
Factors influencing decision to study overseas

The most important influencing factor, on the decision to study overseas, was It was my own decision which was selected by 91% of respondents.

Filter:

Those looking to study overseas only.

Respondents could select up to three answers.



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Argentina 2007

Selecting a school/college or university

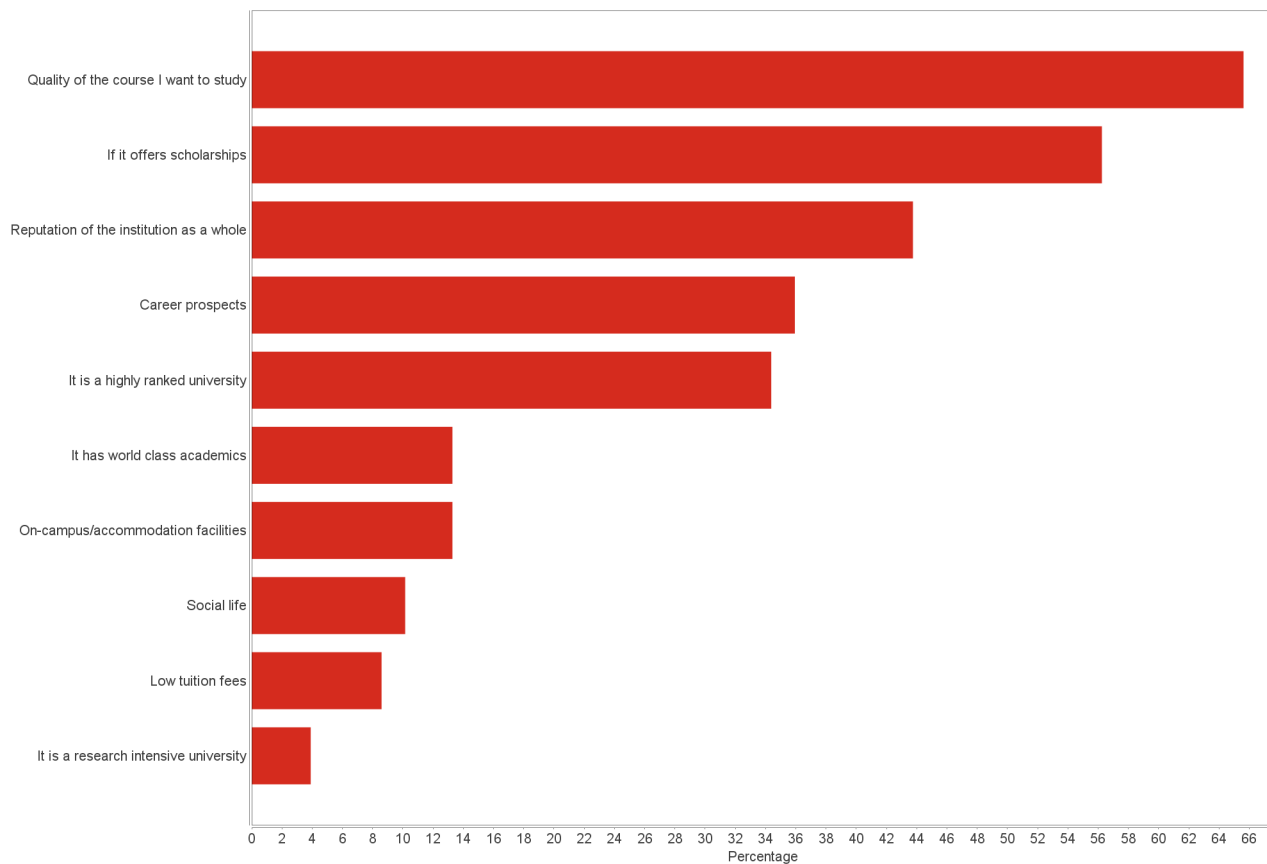
When selecting which institutions to study at the most important factor affecting their decision is Quality of the course I want to study, which influenced 66% of prospective students.

Filter:

Those looking to study overseas only.

Respondents could select up to three answers.

Top 10 results only are shown.



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Argentina 2007

Important factors (when considering a country)

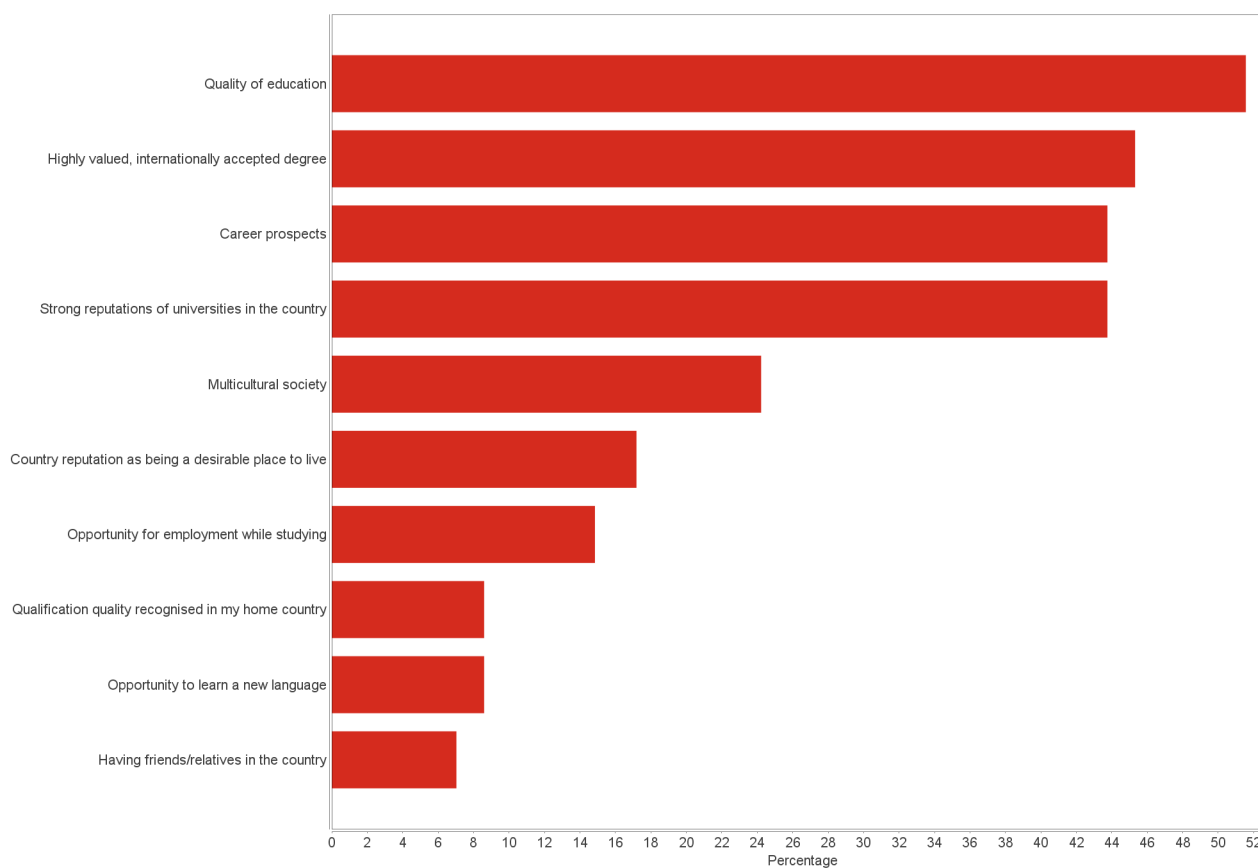
When selecting which country to study in the most important factor affecting their decision is Quality of education which influenced 52% of prospective students.

Filter:

Those looking to study overseas only.

Respondents could select up to three answers.

Top 10 results only are shown.



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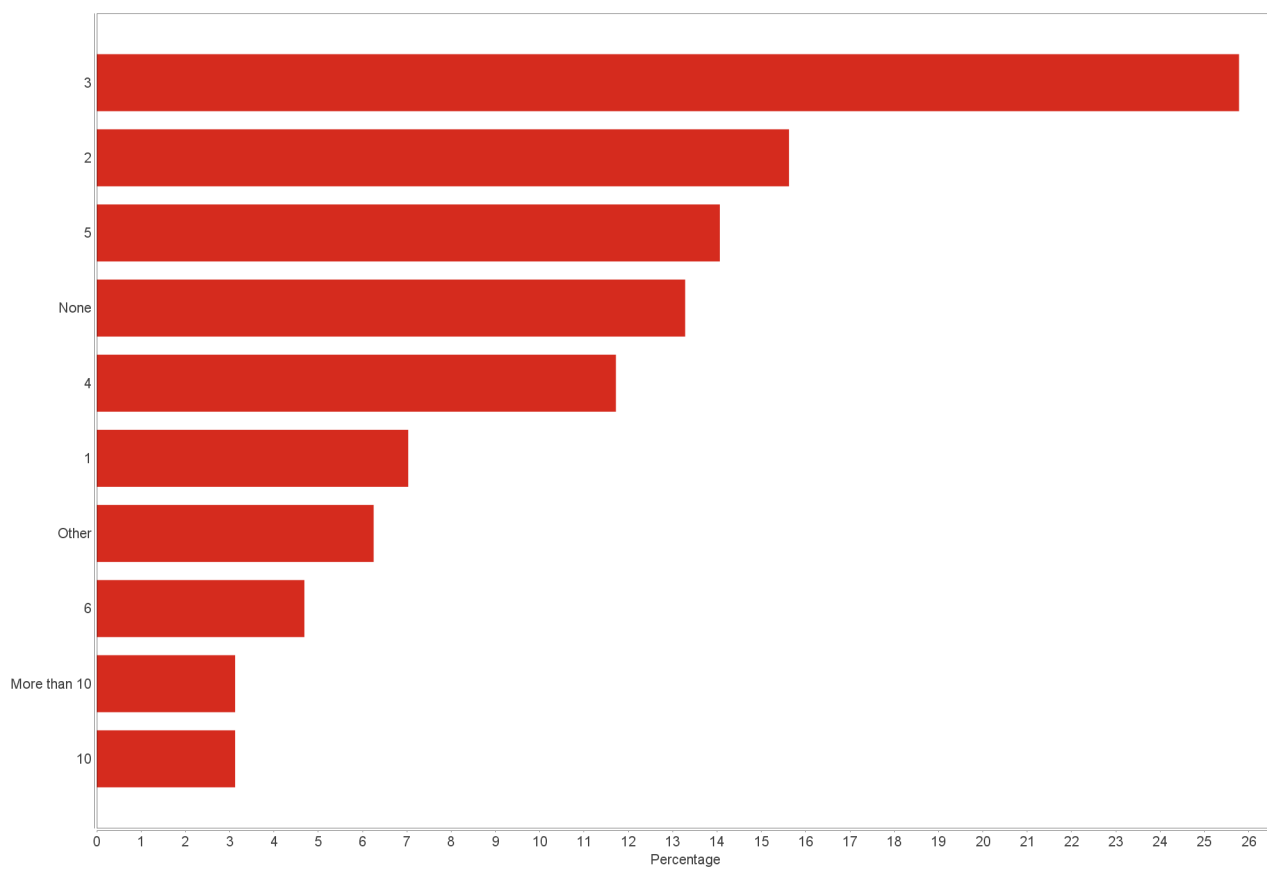
Number of institutions considered

26% of potential students considered 3 institution(s).

Filter:

Those looking to study overseas only.

Top 10 results only are shown.



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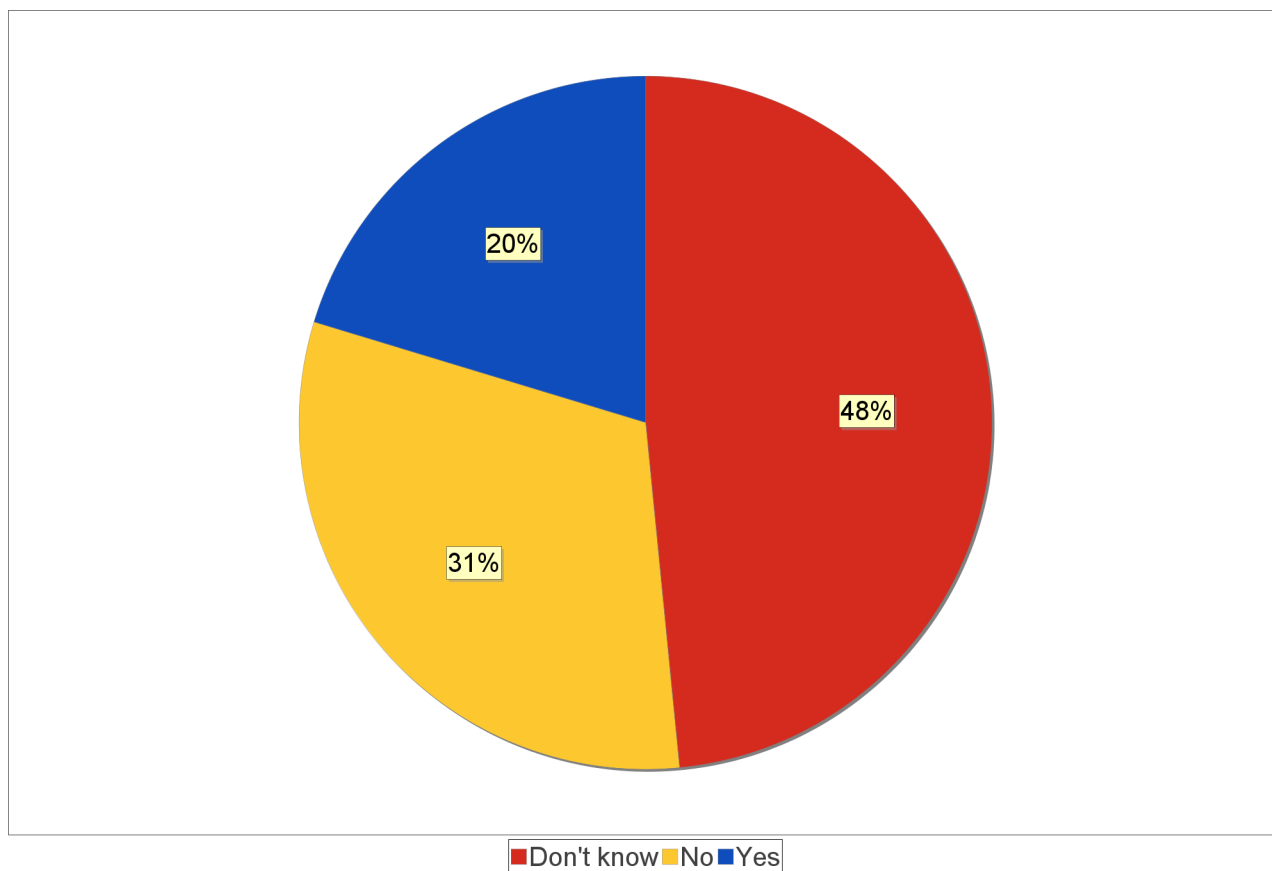
Argentina 2007

Propensity to use an agent

20% said they would use an agent while 31% wouldn't and 48% are not sure if they would use an agent or not.

Filter:

Those looking to study overseas only.



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Argentina 2007

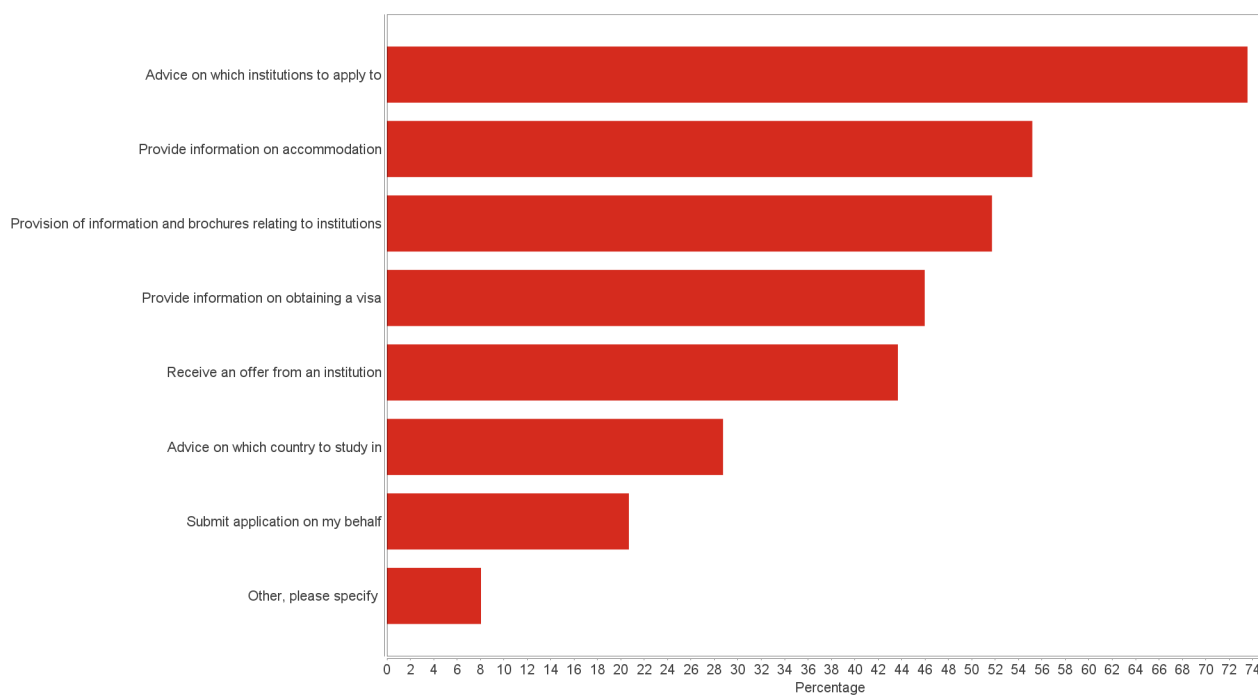
What services do you expect from an agent

The most important service, prospective students wanted an agent to offer was Advice on which institutions to apply to which was selected by 74%.

Filter:

Those who have/may use an agent.

Respondents could select as many services as they thought were important.



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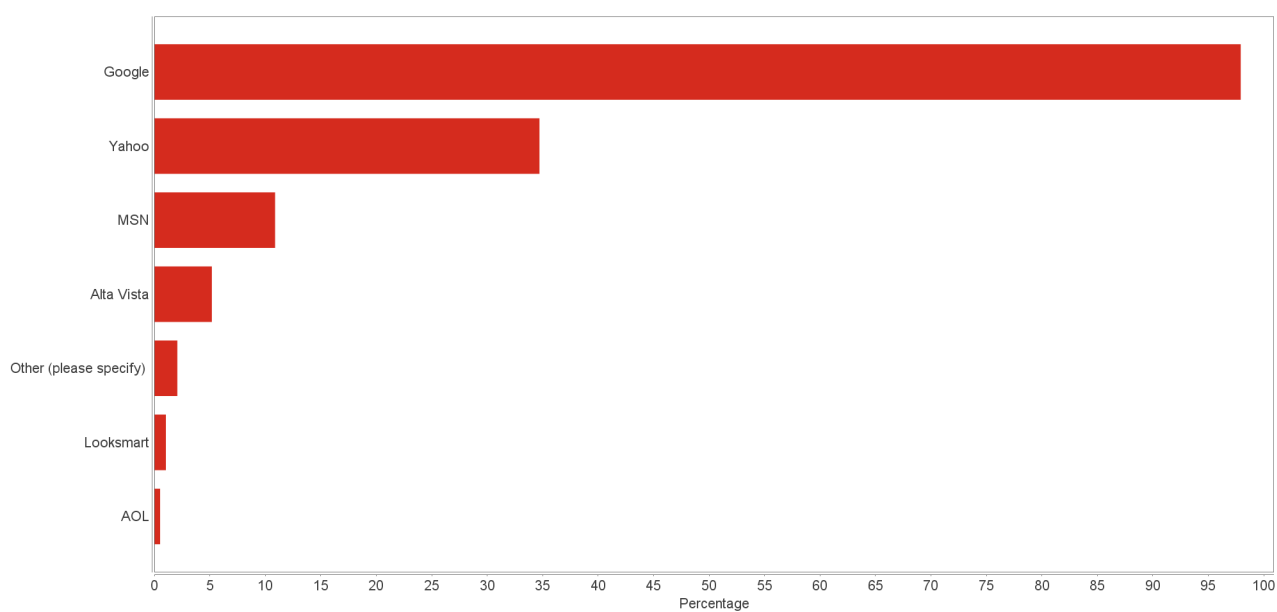


Argentina 2007

Regularly used search engines

Amongst prospective students the most popular search engine was Google which 98% used on a regular basis.

Respondents could select multiple answers.



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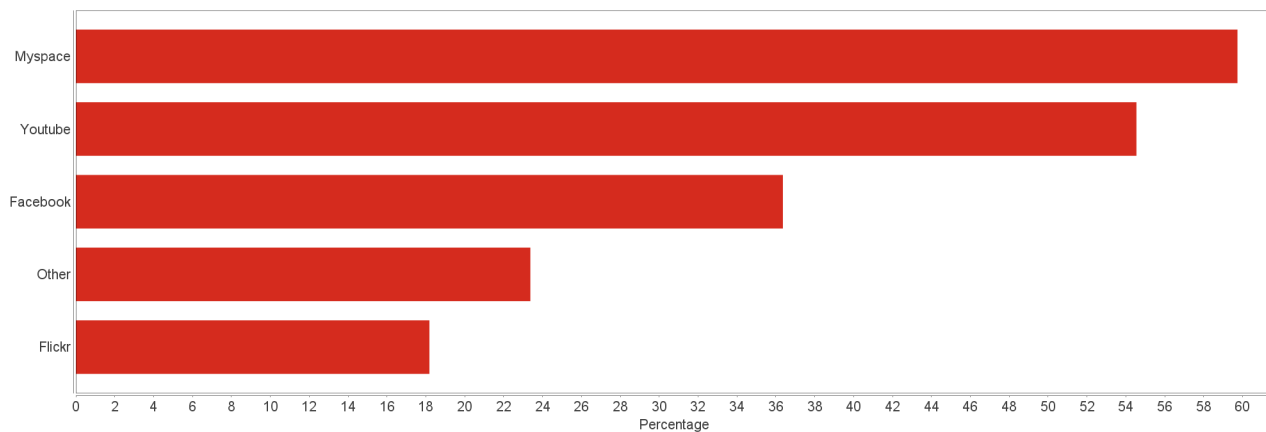
Networking sites used

Amongst prospective students the most popular social networking site was Myspace which 60% used on a regular basis.

Filter:

Those using social networking sites.

Respondents could select multiple answers.



Base: 77

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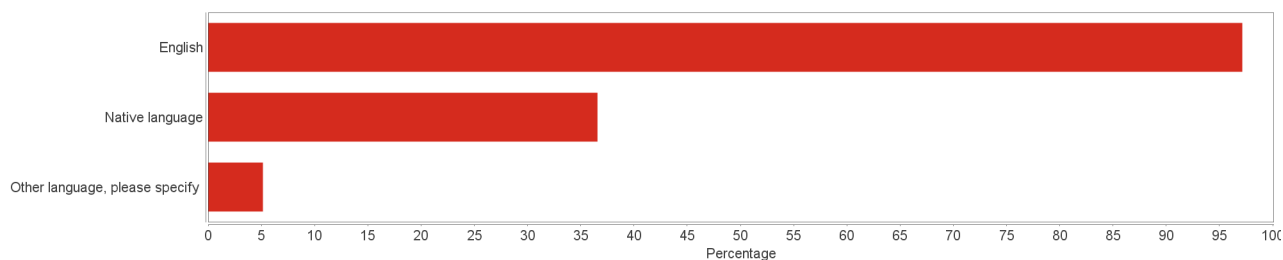
Argentina 2007

Language used to search the web

37% of potential students search the web using their native language while 97% searched the web using English.

Filter

All respondents who use the internet.



Base: 175

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Argentina 2007

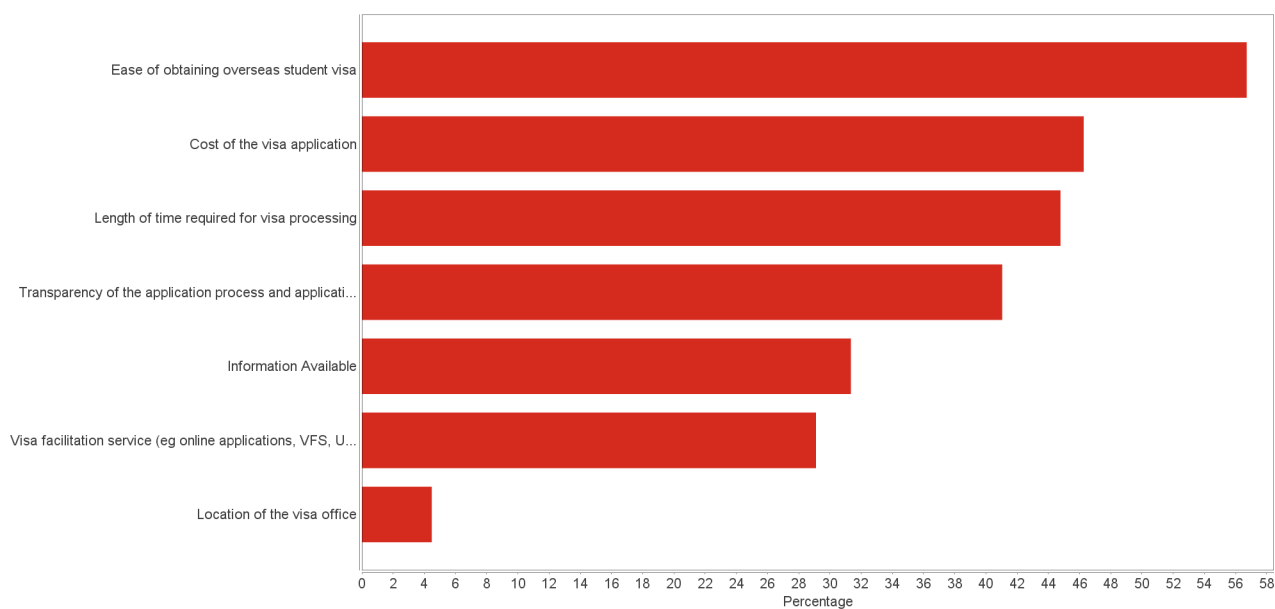
Important issues for obtaining a visa

The most important Visa issue, for prospective students, was Ease of obtaining overseas student visa which was important to 57% of respondents.

Filter:

Those looking to study overseas only.

Respondents could select multiple answers.



Base: 134

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Argentina 2007

Sources of funding for international study

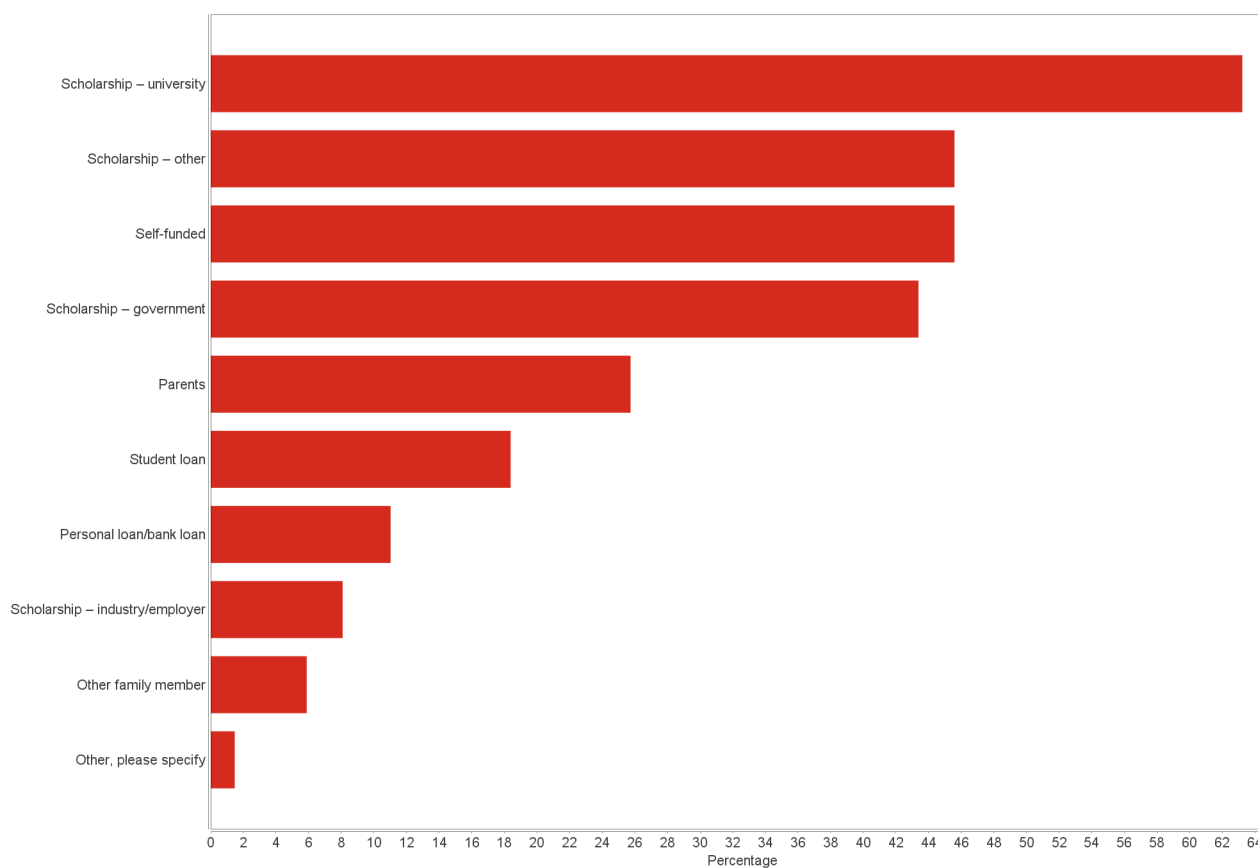
Amongst prospective students the most important funding source was Scholarship – university which was important to 63%.

Respondents could select as many funding sources as necessary.

Filter:

Those looking to study overseas only.

Top 10 results only are shown.



Base: 136

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