



FIYTO

Established 2006

ISTC



World Youth Student & Educational Travel Confederation

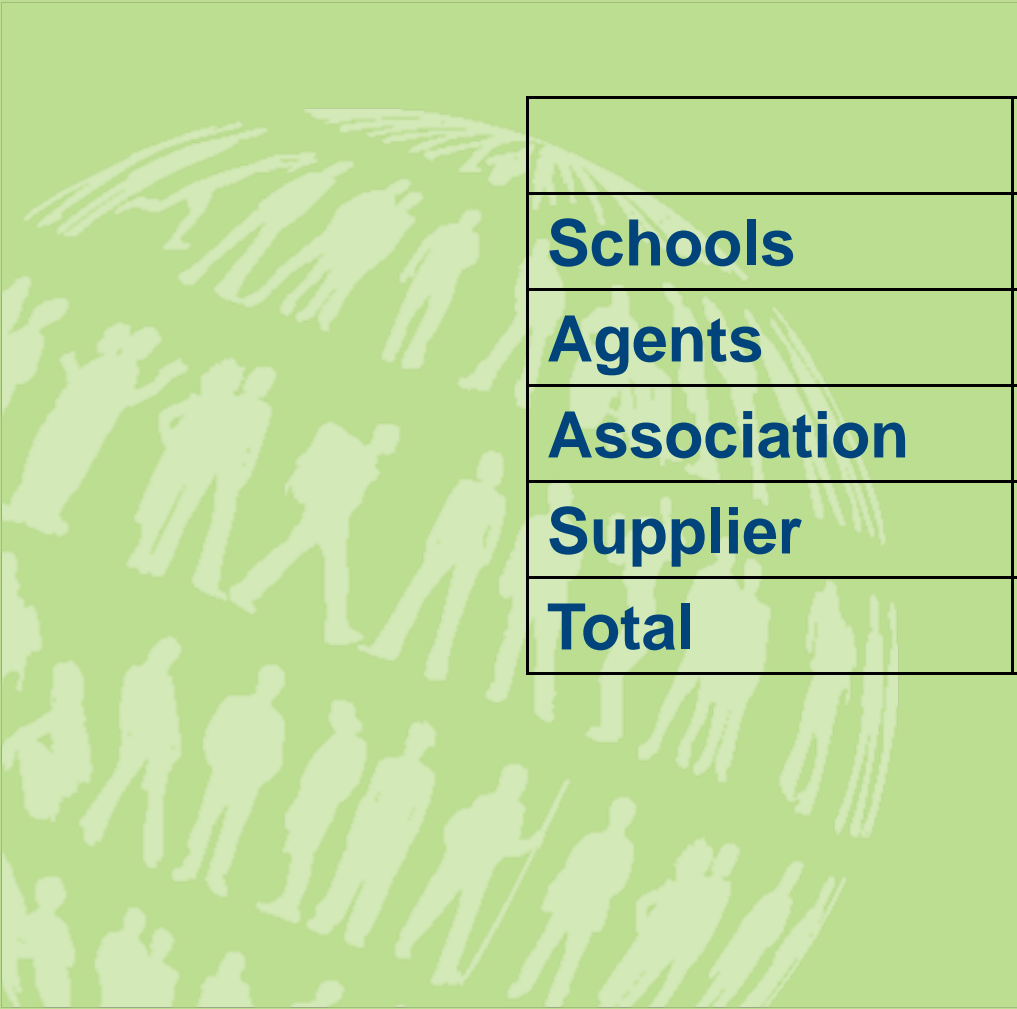
The ALTO Global Directions Survey 2008

A global
survey

Broader
coverage than
previous
editions

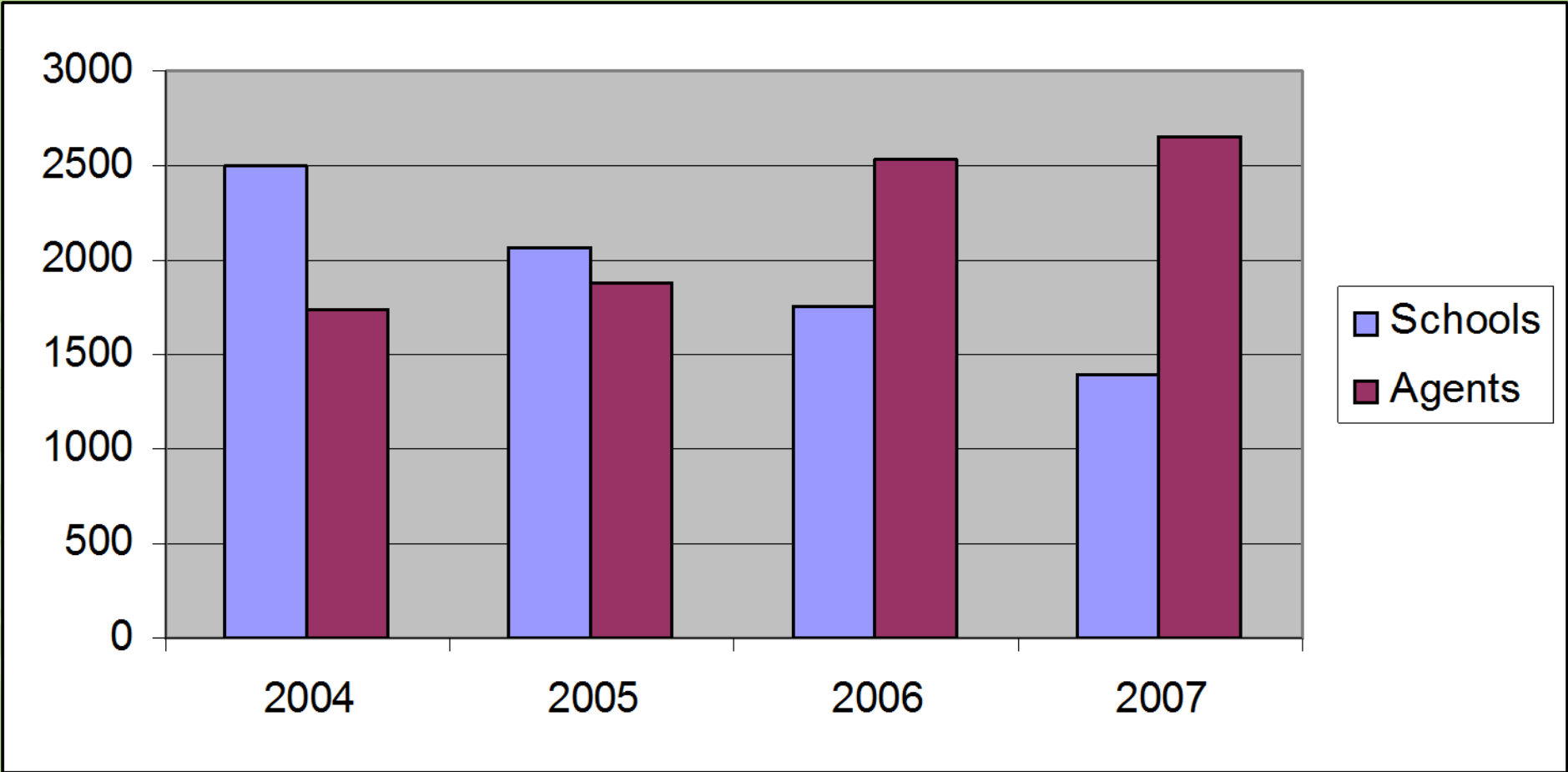
Organisation	Location	members	Responses	%
ALTO	International	165	51	31
ASILS	Italy	39	7	18
BETA	UK	25	4	16
CIEL	Japan	31	6	19
ELTASA	S. Africa	8	4	50
FELTOM	Malta	17	9	53
IALC	International	88	21	24
Languages Canada	Canada	150	19	13
NYESA	US	13	3	23
TANDEM	International	30	13	43
UED	Turkey	30	9	30
Total		596	146	24

Survey covers both schools and agents



	No.	%
Schools	101	68
Agents	36	25
Association	7	5
Supplier	3	2
Total	147	100

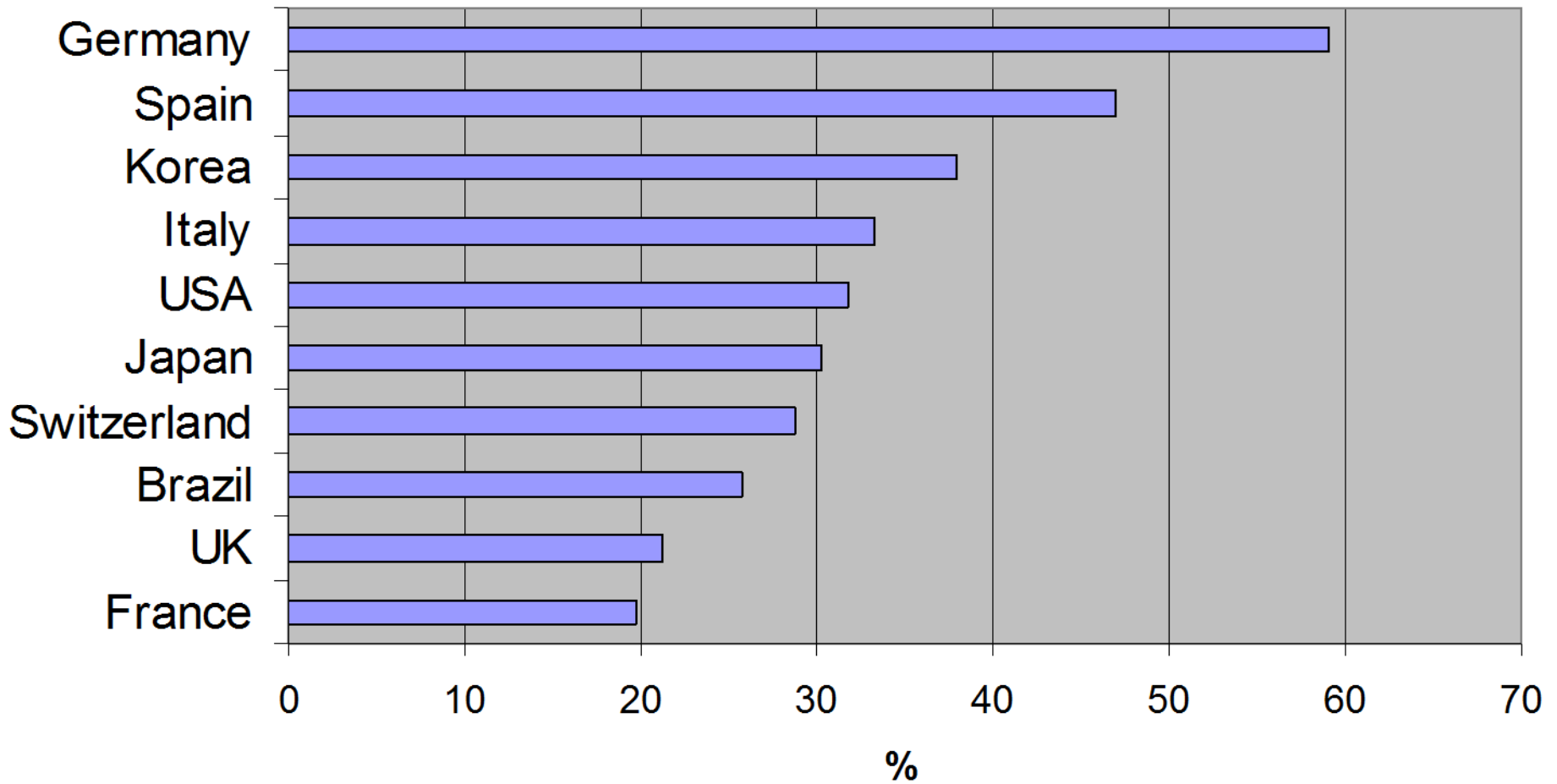
Average number of students per school continues to fall, students per agent increasing




Number of students per school varies widely by region

Region	Mean number of students
Africa	1111
Asia	410
Australasia	174
Europe	1681
North America	1091
South America	577
Total	1399

Main source countries for schools 2008




Main source countries



Rank	2005	2006	2007	2008
1	Japan	Japan	Japan	Germany
2	Germany	Spain	South Korea	Spain
3	USA	Germany	Spain	South Korea
4	Spain	Brazil	Brazil	Italy
5	Brazil	Italy	Switzerland	USA
6	France	South Korea	Germany	Japan
7	Italy	Switzerland	Italy	Switzerland
8	South Korea	France	UK	Brazil
9	Switzerland	Mexico	USA	UK
10	UK	USA	Mexico	France

Ranking of destination countries by numbers of students received




Country	%
United States	17.4
United Kingdom	17.3
Australia	15.6
New Zealand	15.6
Germany	5.5
Spain	4.2
South Korea	4.0
Brazil	2.9
Italy	2.8
Japan	2.8

Main destination countries



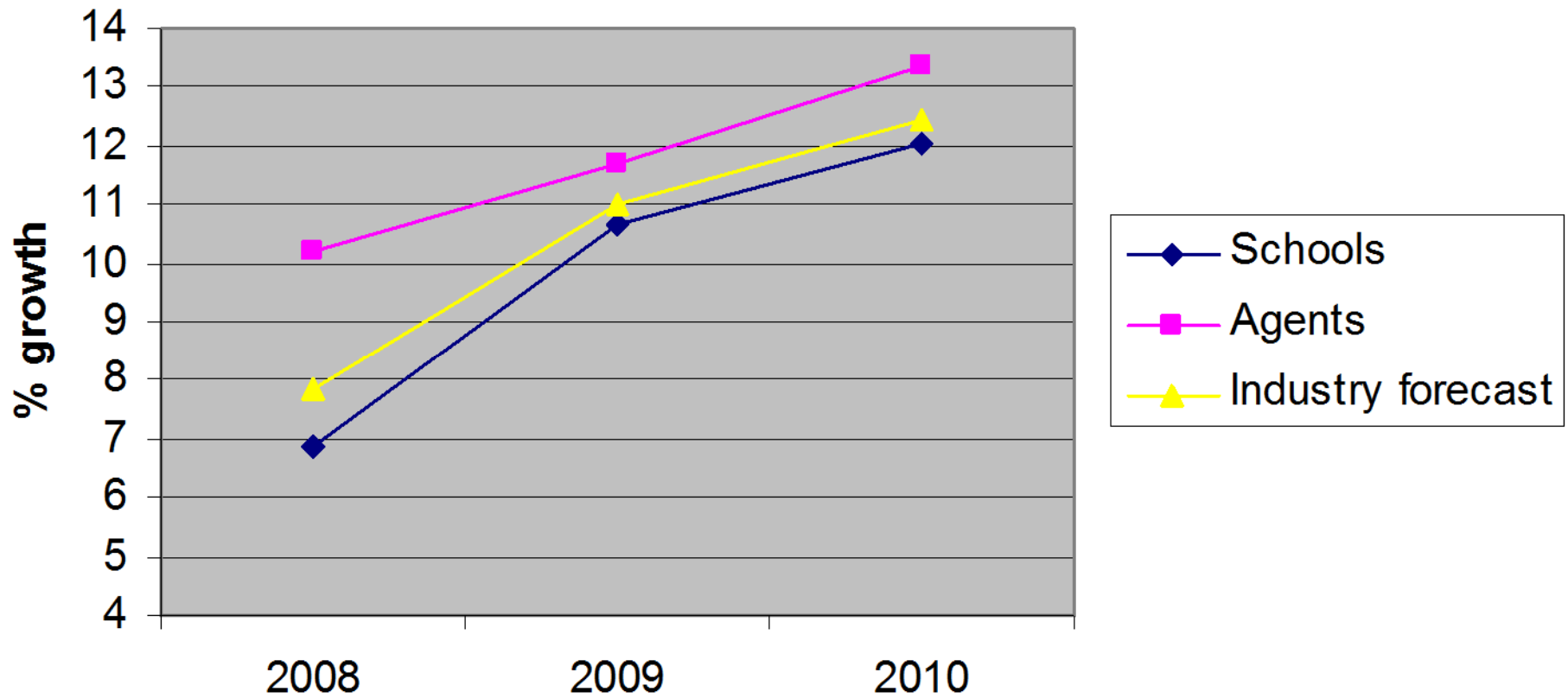
Rank	2005	2006	2007	2008
1	UK	UK	UK	UK
2	Spain	Spain	USA	USA
3	France	USA	Spain	Canada
4	USA	Canada	Canada	Australia
5	Canada	Australia	Australia	Spain
6	Australia	France	France	France
7	Ireland	Malta	Malta	Germany
8	Malta	New Zealand	Ireland	Malta
9	Italy	Italy	Germany	Italy
10	Germany	Ireland	Italy	Ireland

Destinations most likely to grow in future

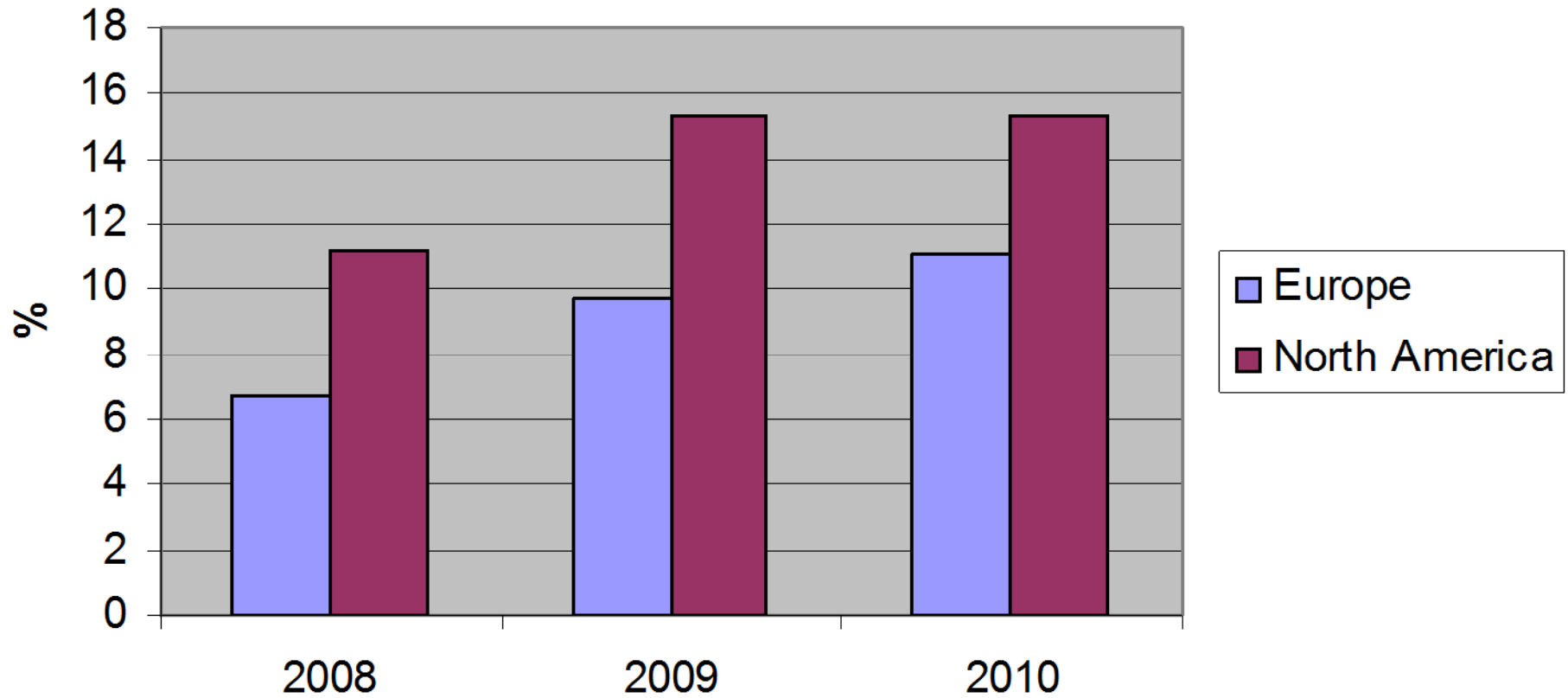


Country	Number of mentions
USA	15
China	12
UK	7
Spain	6
Russia	5
Canada	4
Korea	4
Australia	3
Brazil	3
Germany	3

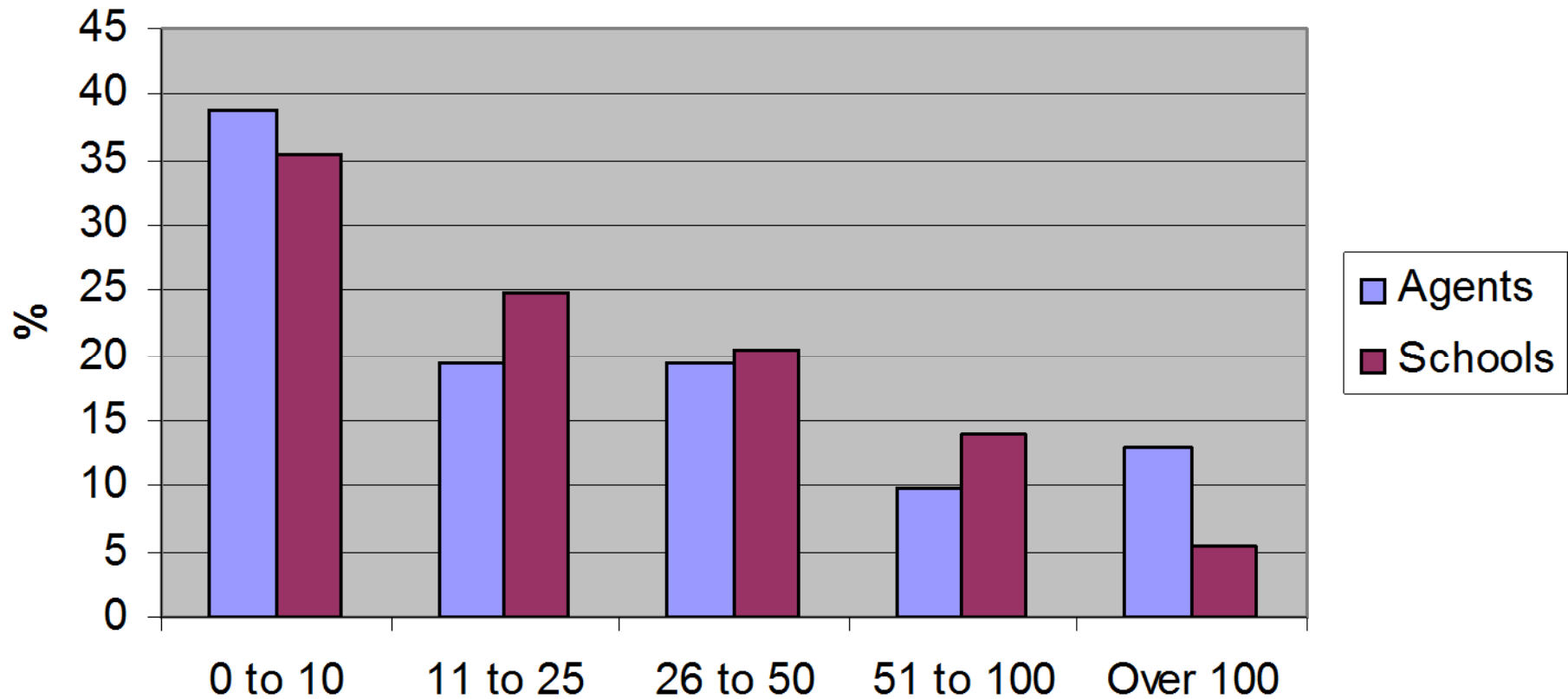
Forecast growth rates for language travel



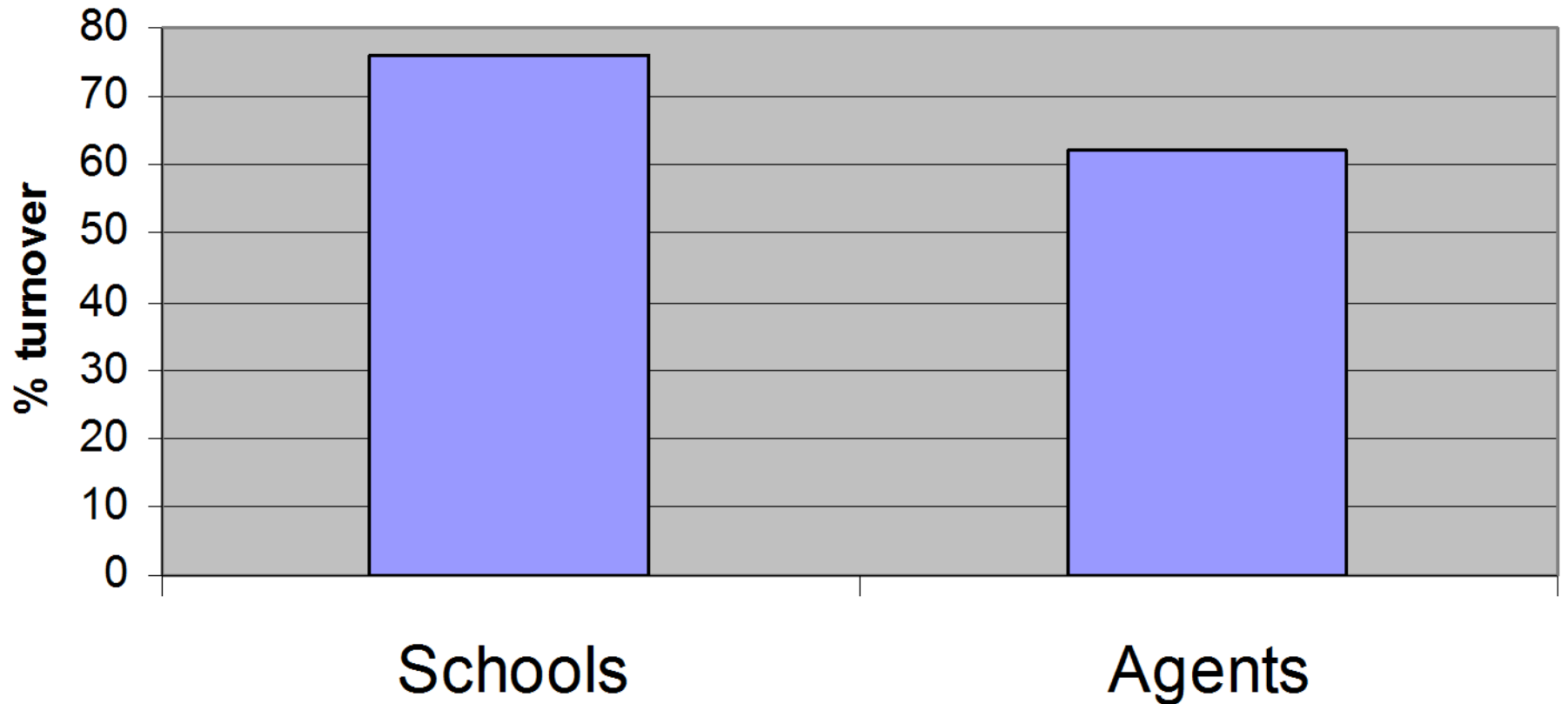
Forecast growth rates by region



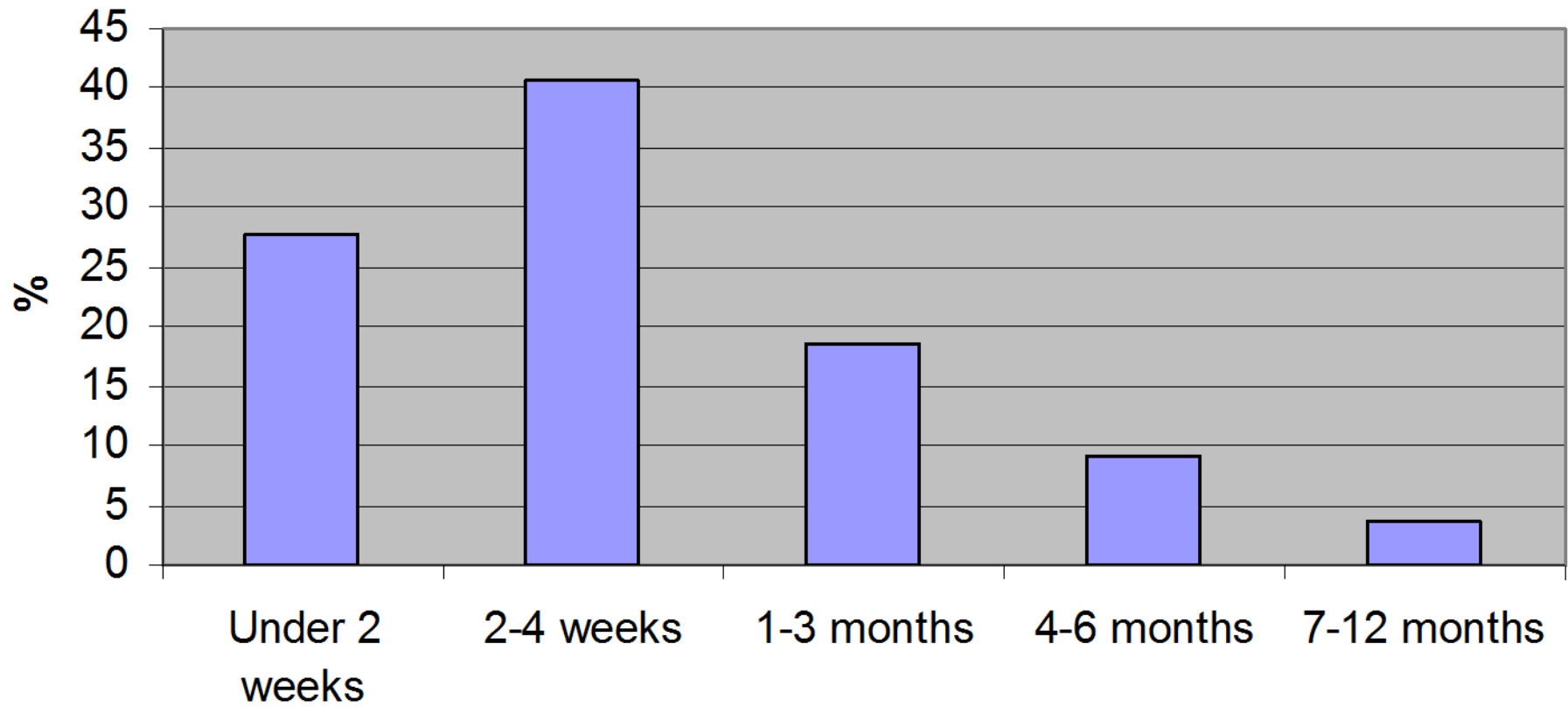
Full-time staff employed



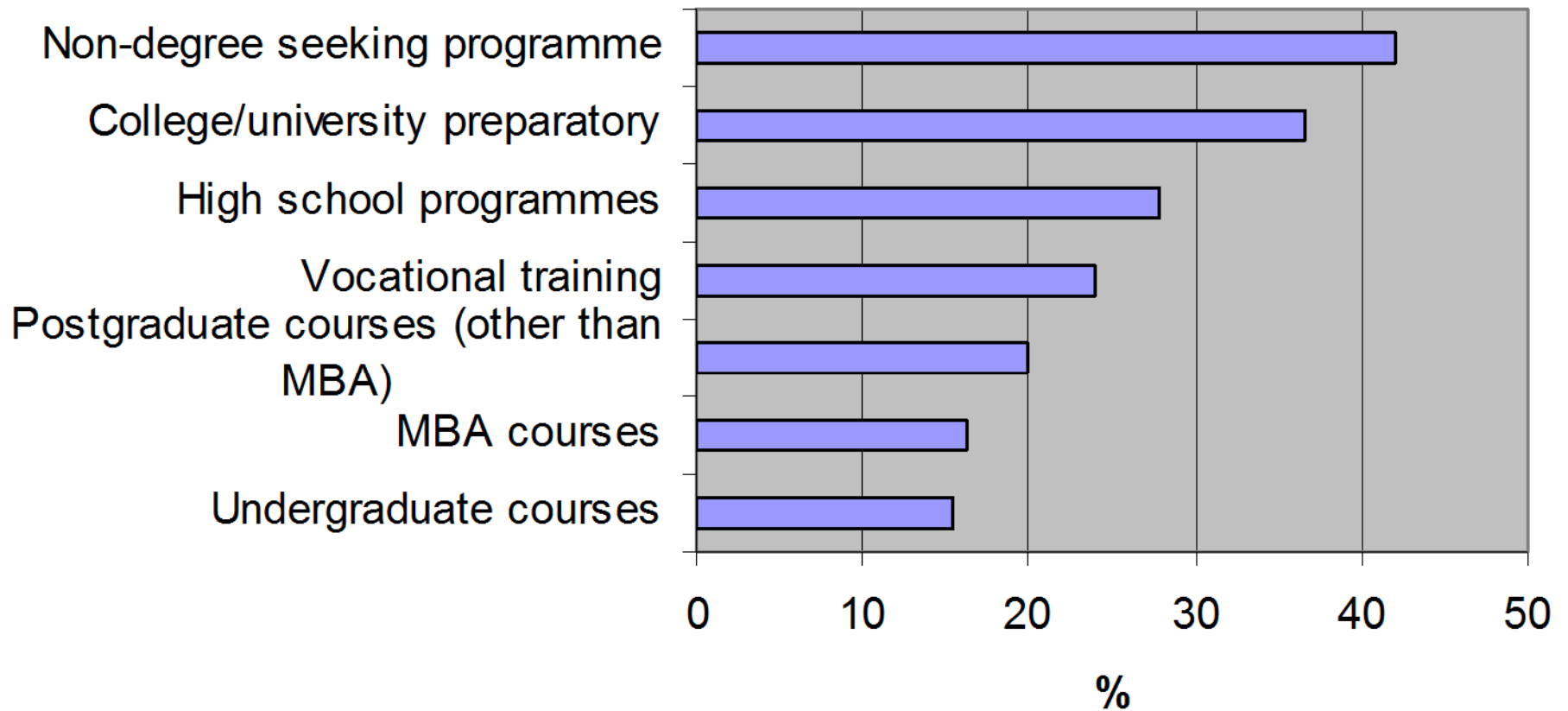
% turnover from language travel



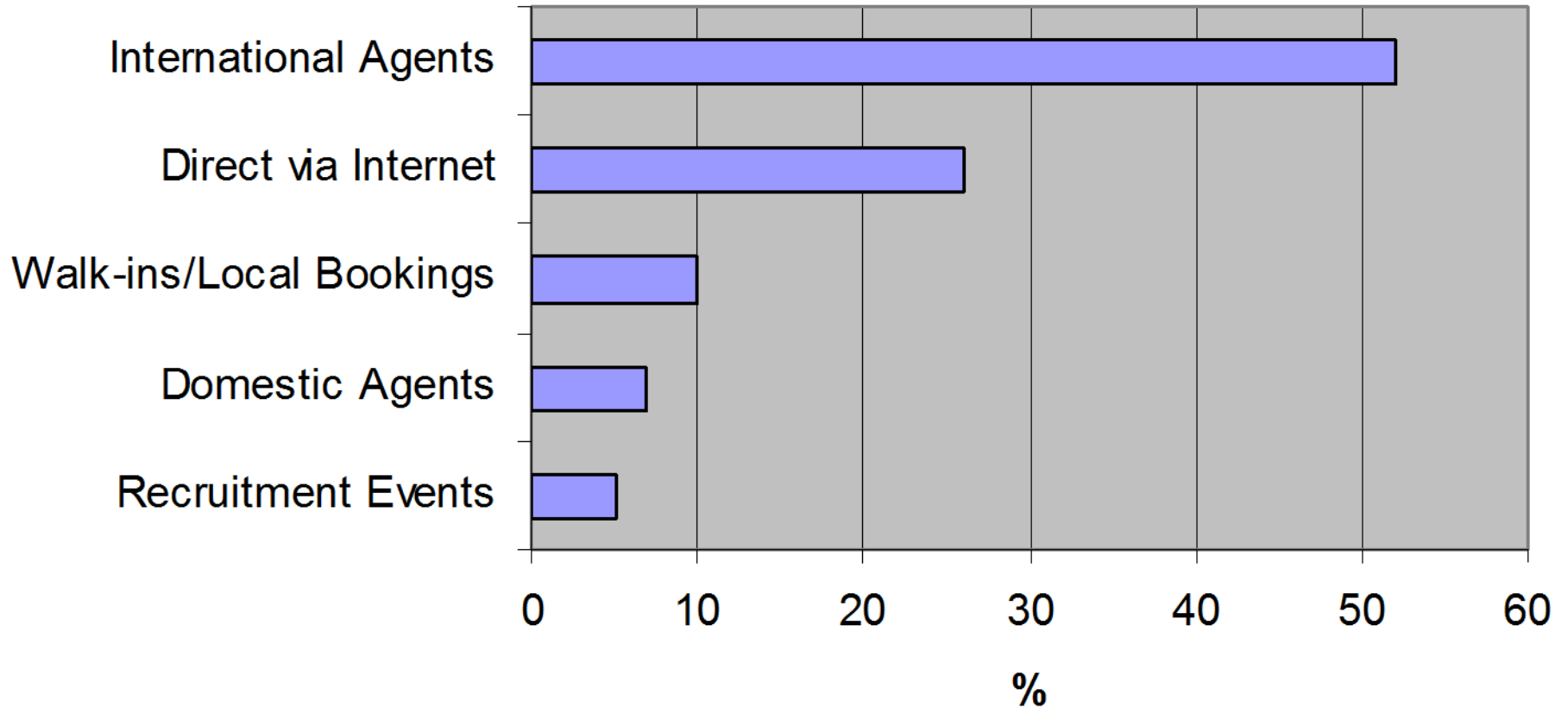
Average course duration



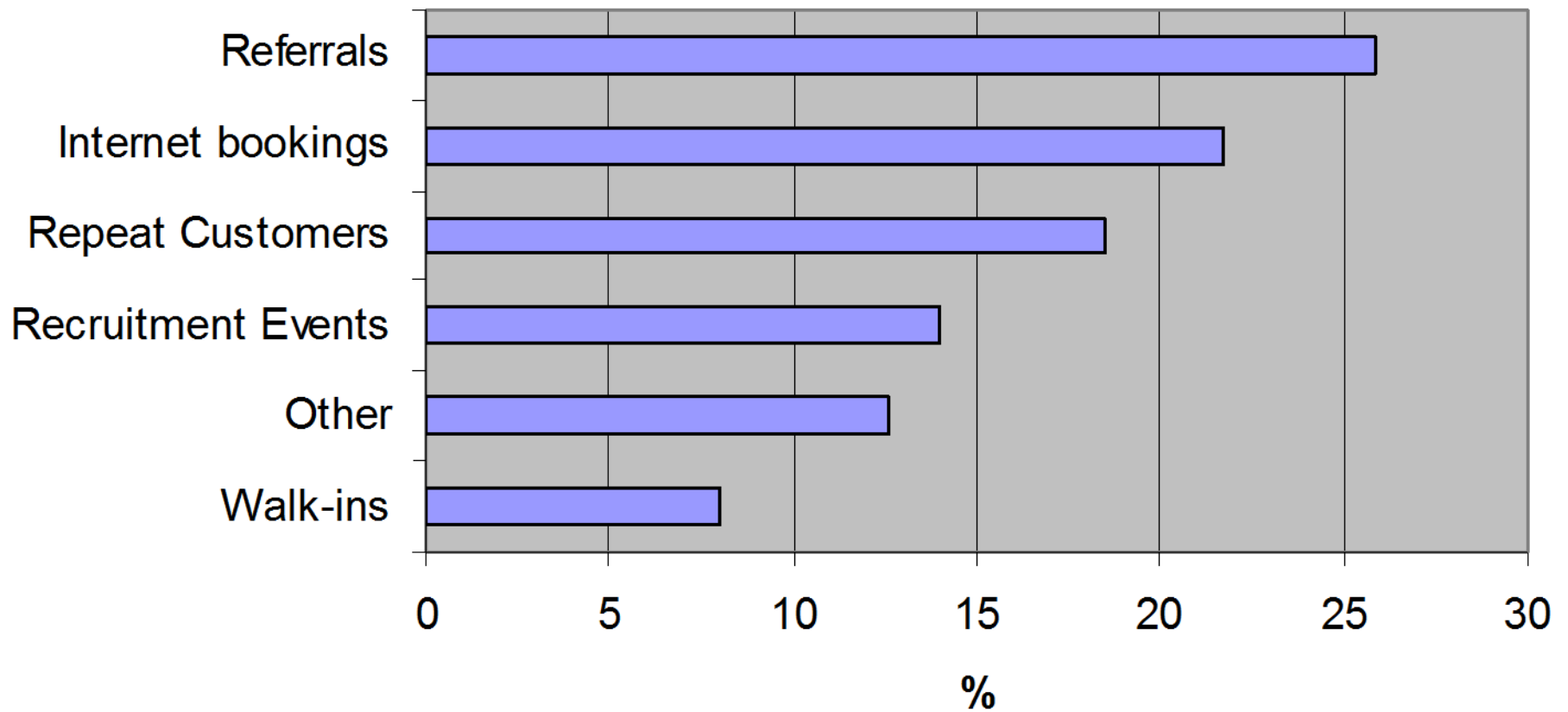
Types of courses offered



Sources of recruitment - schools



Recruitment sources - Agents



Products likely to become more popular in next three years

