

France
Market Profile 2011 - 2012

May 2011



1. Introduction

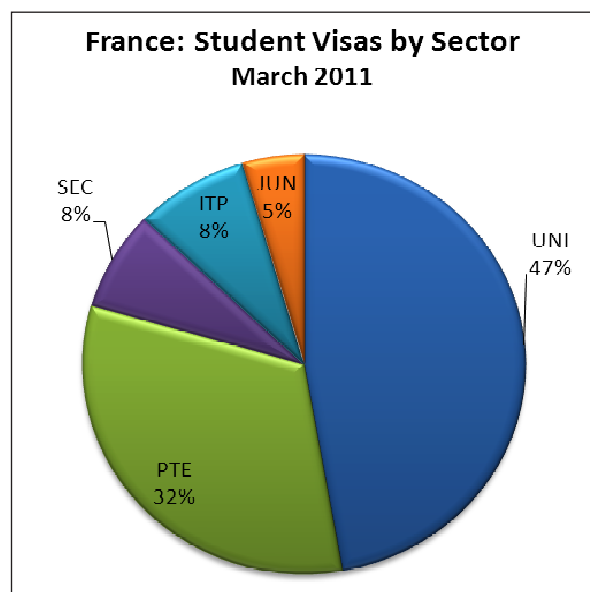
France has a population of 62.9 million with a per capita GDP of US\$31,096. It is the third-largest economy in Europe after Germany and the UK. France's unemployment rate has increased to over 9%. However, France has weathered the global economic crisis better than most other large European Union economies because of more resilient consumer and government spending, and lower exposure to the downturn in global demand.

An estimated 450,000 French students travel overseas each year. The French market is characterised by a young clientele. An estimated two-thirds of students travelling abroad are under the age of 18. The majority of these students take part in overseas language trips and school exchanges organised by their school or travel/education agencies. Around 30% of French students travel during the July-August summer holidays, and most undertake language studies and stay with host families.

Each year, more than 63,000 French students undertake tertiary studies abroad. About 20,000 of these are Erasmus students who receive scholarship funding to study in another European Union country.

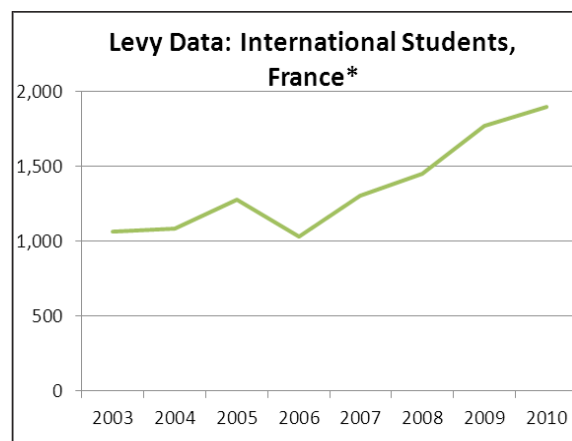
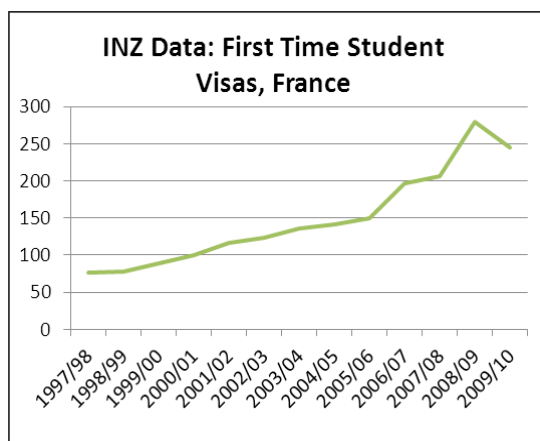
In 2009/10, 245 New Zealand student visas were issued for French students (a slight decrease from the previous year). The majority of French students were enrolled in New Zealand tertiary education; less than 30 were studying at New Zealand secondary schools.

The number of French students undertaking English language courses in New Zealand increased to 502 in 2009. However, the majority of these language students studied for less than three months without a visa in New Zealand and therefore do not show up in Immigration New Zealand visa statistics.



UNI=Universities; PTE=Private Training Establishments; SEC=Secondary; ITP= Polytechnics; JUN=Junior (Primary, Composite, Contributing, Intermediate)

The best opportunities for New Zealand education providers in France are in the tertiary and English language sectors.



*Note that Levy Data includes Tahitian, New Caledonian and French Polynesian students in the statistics as well. The Department of Labour (Immigration New Zealand) and The Ministry of Education provide regular updates to the Visa and Export Education Levy Statistics. The latest statistical information can be found at www.educationnz.org.nz/policy-research-stats/statistics

2. Local Education System

Secondary schooling in France is based on a republican model of secular education. Successful completion of the *baccalauréat* (equivalent to Year 13 in New Zealand) guarantees high-school leavers entry into France's public universities.

Around 90% of French students learn English at secondary school. However, it is widely acknowledged that English is not well taught and consequently the French have more difficulty than other European nations communicating in English.

The French tertiary sector is comprised of five types of institutions: universities, technical universities (IUT), engineering schools, business schools and vocational education and training institutes.

The French government has completed a major reform (called LMD, or *Licence-Master-Doctorat*) of degree structures for all tertiary qualifications in France. Degrees comprise a three-year *Licence* (bachelor), two-year *Master* (master) and three-year *Doctorat* (PhD) programmes aligning with the Bologna Accord in Europe. The aim of the reform is to facilitate student mobility between European countries and help continental Europe better compete in the growing global higher education market.

The system is based on credits (called ECTS in French). Normally students accrue 60 credits per full-time year of study. Thus, students accumulate 180 points for a three-year *Licence*, and 300 points in total for a two-year Master's degree.

France has 81 public universities, 31 technical universities (IUT), 277 engineering schools and *Grandes Écoles* (prestigious engineering and business schools), 236 business schools and several vocational training institutions.

Prior to the LMD reform, undergraduate study consisted of a *DEUG* (two years' study) and *Licence* (three-year degree). Postgraduate study was made up of the *Maîtrise* (similar to honour's year), *DEA* (pre-doctoral research diploma), *DESS* (postgraduate degree similar to a master's) and the *Doctorat* (PhD).

University tuition is almost entirely subsidised. For a *Licence* (Bachelors degree), students pay 174 Euros in tuition fees annually. Tuition fees for a Master's degree are 237 Euros, and a PhD costs 359 Euros per year. Fees for a classic business school are between 5,000 and 10,000 Euros per year, while engineering schools charge up to 15,000 Euros per year in tuition fees. Fees at the *Grandes Écoles* vary but are generally high.

A select number of engineering *Grandes Écoles*, are considered to be schools for France's future elites and enjoy a status comparable to that of Oxbridge in the UK. A large number of chief executives in major French companies are graduates from *Grandes Écoles*, and a significant proportion of these are engineers. Leading *Grandes Écoles* include *Ecole Polytechnique*, *Ecole Centrale*, *Ecole des Mines*, *Ecole des Ponts et Chaussées*, *ENSAM* and *INSA*. In addition to engineering, students notably specialise in commerce, administration and teaching.

Annual tuition fees for French business schools (*Ecoles Supérieures de Commerce*) range from several thousand to tens of thousands of Euros. Certain leading business schools, such as *Insead*, *HEC*, *Essec* and *ESCP*, are also referred to as *Grandes Écoles*.

Vocational education and training institutes provide a full range of vocational courses that are offered at post-secondary level. They are for the most part private and in many cases teach subjects also offered at IUTs (which are public institutions). Courses offered range from hotel management,

secretarial training, horticulture, communications and journalism to commerce, information technology training, electronics, engineering, science, design, architecture and the plastic arts.

3. General Advice for New Zealand Education Providers

New Zealand has several competitive advantages that appeal to French students of differing age groups:

- it is perceived as an exotic, beautiful, safe and interesting destination
- friendliness, hospitality and way of life are positively perceived
- courses that include tourist or sporting activities are in increasing demand
- the current exchange rate of approximately NZ\$1.86 to 1 Euro makes study in New Zealand a cheaper option compared to destinations such as the UK, US, Ireland, or Australia for courses of more than six weeks.

The high number of French students opting to study in Australia compared to New Zealand (3030 Australian student visas issued in 2009/10 compared to 701 in New Zealand) suggests that New Zealand is not fulfilling its potential in the French education market. The huge rise in demand for Australian courses (mostly at tertiary level but closely followed by English language programmes) over the last ten years is a result of Australia's successful and intensive promotion of its education capabilities in France. Australia is much better known to the French than New Zealand. Australia is perceived as a less distant, easier-to-get-to destination than New Zealand.

If New Zealand is to attract more students, it will need to raise its profile through greater promotional activity aimed at the students/parents who are likely to enrol in a foreign study programme. This will have the effect of pushing potential students towards French education agents/tour operators who see value in promoting New Zealand and developing the market in partnership with New Zealand institutions. Close cooperation with French education agents and supporting their efforts in promoting New Zealand education programmes is highly recommended.

4. Sector-Specific Advice for New Zealand Education Providers

4.1 Undergraduate and Postgraduate Courses

New Zealand faces stiff competition from markets closer to France, including Belgium, the UK, Canada, the US, Germany, Switzerland and Australia. Around 63,000 French tertiary students enrol in study programmes abroad each year.

There is high demand from French undergraduate students to complete the final (third) year of their bachelors degree abroad. Australia is an attractive destination for doing this. Difficulties have often been experienced in getting accepted at individual New Zealand institutions. This discourages a number of French students (and agents) from choosing New Zealand as a study destination.

French education agents report that management and commerce, communication, sports and law tend to be the most popular subjects for French tertiary students going abroad.

In 2009, there were 466 French students enrolled in New Zealand tertiary education programmes (the majority at bachelor level followed by PhD and master level).

The domestic fee status for French postgraduate students in New Zealand has been partly revoked. French students applying for postgraduate studies in New Zealand since 5 June 2009 have had to pay international tuition fees – except at PhD level. This change was reported by French agents to have caused a drop in student inquiries. However, due to the current high Australian dollar French students have increasingly opted for New Zealand in the last six months.

The biggest barrier for New Zealand education in France is the lack of knowledge about New Zealand education capabilities. Stronger promotion for New Zealand as a high-quality and safe study destination is needed.

4.2 Vocational and Technical Qualifications

Demand for foreign vocational courses is small but growing. Australia reports that there is good demand for sports management, computer studies, multimedia, tourism and hotel management at Australian vocational institutions.

Of the 3,030 Australian education visas issued to French students in 2009/10, 459 were issued for vocational courses in Australia. New Zealand institutes of technology, polytechnics and private tertiary training providers need to promote their programmes in France more vigorously.

4.3 Primary, Intermediate and Secondary Schools

French primary and secondary school children are generally very mobile. There is some potential for market growth among school students travelling abroad to study. New Zealand's ability to compete in this market, however, remains somewhat limited. French high school students typically enrol in short-term courses of two to four weeks. Trips are generally endorsed and organised by the French schools. Due to numerous exchange programmes between French and European schools, the majority of French students and parents do not see a reason to spend time abroad as fee-paying students.

The relatively high cost of travel and long travelling time also discourages parents from choosing New Zealand as a short-stay destination. New Zealand is often perceived as less attractive than markets closer to France. There is a reluctance to send high school children to the other side of the world, outside the French education system and the *baccalauréat*, and away from the future networks of relationships that children are building at this time and which count for so much in French society.

Nonetheless, there is a small niche market that New Zealand secondary schools can tap into for students wishing to complete a final year in an English-speaking environment, or of children who have not adapted well to life in the *lycées* (French high schools).

4.4 English Language

Steady demand for overseas English language courses over the past decade has benefited a number of New Zealand language schools, many of whom have been active in France for a number of years through agents. The French language travel market continues to perform well. There has been growth across all age bands in recent years, particularly among 19–24 year olds who, more than ever, are aware of the importance of being able to speak English both for their tertiary studies (an increasing number of tertiary institutions require students to learn at least one foreign language and English is by far the most popular choice) and in their working life. For this reason, a number of French companies offer overseas language training opportunities to their workers as a complement to the language tuition they may receive during the year. Many employees are required to undergo training throughout their working life, using holidays for learning with the family, mixing culture, sport and language tuition.

In 2009, there were 502 French students enrolled at New Zealand language courses (an increase of 22% on the previous year).

5. Market Trends

French education agents have noted several changes in the French education travel market over recent years:

- increasing student mobility across borders in higher education, owing partly to the harmonisation of degree structures in Europe in line with the Bologna Accord (3-2-3 year degrees)
- increased awareness among students and parents of the importance of the need to speak and write English fluently in higher education and professional life
- a tendency of French people to seek out new and interesting, exotic countries in which to learn English, as opposed to traditional destinations such as the UK
- growing demand among older age groups, who have more time to travel abroad to learn English.

The economic crisis currently does not seem to affect French students enrolling in education programmes abroad. French education agencies that offer programmes in Australia and New Zealand are not reporting any decrease in student inquiries.

There is growing demand for exchanges organised between French and New Zealand tertiary institutions. The majority of French business schools require their students to study overseas as part of their degree. In the increasingly competitive market of tertiary business education, more and more French business schools are looking to set up partner or exchange programmes with universities and polytechnics in English-speaking countries as a selling point to attract students.

The 19-to-24 age band is a key segment where future growth is likely. This is largely due to the increasing need in France to be able to speak English at work.

New Zealand does not appear to be fulfilling its potential in the French education market. French agents say that New Zealand education has great potential in France, especially at undergraduate level and in English language. The biggest barrier, however, is the lack of knowledge in France about New Zealand's education capabilities.

6. Competitor Activity and Statistics

The United Kingdom is the most popular English study destination for French students. The next largest markets are Ireland, the US, Malta, Canada and Australia.

However, according to education agents, the French education travel market has undergone significant changes in the last ten years. Traditional destinations such as the UK now attract fewer students, due notably to increased competition from growing markets like Australia. Agents also note a greater willingness for French tertiary and Language students to travel further afield to undertake study.

7. Immigration Requirements

Short language courses of up to three months do not require a student visa for New Zealand. French citizens can simply enter the country on a valid passport as long as they hold a return ticket, making this type of student mobility very difficult to track.

Students need to apply for a student visa if enrolled in a study programme of more than three months or if enrolled in more than one course of less than three months duration.

Secondary school students always need to apply for a student visa, even if they are enrolled at a New Zealand secondary school for less than three months.

Student visa applications are handled through the New Zealand Embassy, 7 Rue Leonard de Vinci, 75116 Paris. The application form can be downloaded at www.immigration.govt.nz

New Zealand has a working holiday visa scheme with France enabling French citizens aged 18-30 to live and work in New Zealand for a period of up to one year. The scheme is also open to young New Zealanders of the same age group wishing to work in France. In 2009, 3,256 New Zealand working holiday visas were issued to French nationals.

8. Key Dates 2011 (Including Public Holidays and Term Dates)

1 January	New Year's Day
25 April	Easter Monday
1 May	Labour Day
8 May	1945 Victory Day
2 June	Ascension
13 June	Whit Monday
14 July	Bastille Day
15 August	Assumption
1 November	All Saints' Day
11 November	Remembrance Day
25 December	Christmas Day

The latest Public Holiday information can be found at www.worldtravelguide.net/france/public-holidays

9. Visiting Time Recommendations

The best time to visit is from January to May (except during Easter), and October to November.

10. Helpful Hints

- New Zealand education providers should establish a strong business relationship with an education agent in France.
- Once initial contact has been made, encourage your French partner to visit New Zealand and see first-hand what your institution, and the country, have to offer.

- Visit your partner at least every two years to better acquaint yourself with the French market and stay up to date with market trends.
- With the help of your French partner, organise seminars aimed at students, educating them about the benefits of studying in New Zealand. Consider involving other New Zealand education providers to reduce costs.
- If targeting younger students, consider developing courses specifically for the French school holiday period during July and August (equivalent to term three in New Zealand).
- There is a formality about the French way of doing business that you are wise to be conversant with. The French have a preference for strategic alliances built on enduring business relationships. They generally like agreements to be in writing. The French rarely use first names until a relationship is well established.
- You must be prepared to put time into visiting and building relationships despite the high costs of travel and accommodation involved.
- No reference to France is complete without talking about food. The business lunch remains an important and frequently used business and social occasion. If you make an appointment near lunchtime, lunch is assumed to be included. Be sure to be clear as to who is doing the inviting. As a general rule, it will be you who pays, not the agent.



www.educationnz.org.nz

