

Italy

Market Profile 2011 - 2012

May 2011



1. Introduction

New Zealand has experienced an increase in Italian student enrolments over the last few years across all educational sectors. However, accurate statistics of Italian students in New Zealand are difficult to obtain as the majority of Italian students attend short-term programmes (English language courses in particular) and so are often in New Zealand on visa waivers.

Italians are attaching growing importance to international study, and there is wider recognition by both the Italian Government and businesses of an overseas study experience. New Zealand's profile has risen in recent years and it is perceived as a safe and friendly country.

Qualifications obtained in New Zealand do not always translate into comparable qualifications recognised across the board in Italy. In many instances, recognition needs to be negotiated on a case-by-case basis between institutions and this can inhibit Italian students from travelling to New Zealand for study purposes.

Italy has a population of 60.2 million. In 2009, GDP per capita PPP was USD 29,068 (-4.88% from 2008). Budget deficit and public debt (balancing the budget) remains Italy's biggest economic challenge.

The general unemployment rate in Italy increased to 8.5% in 2010, peaking higher in some economically depressed areas. As a consequence, the job market is very competitive and a number of Italian students are eager to spend some time studying abroad in order to improve their employability. At the same time, the Italian labour market has areas (such as the environmental sector, information and communication technology, and social services) where skilled people are hard to find and more specialisation is needed.

2. Local Education System

The Italian education system comprises of:

- *asilo nido* - kindergarten (three months to three years)
- *scuola materna* - primary school (three to five years)
- *scuola primaria* - first school (six to 10)
- *scuola media* - secondary school (11 to 14)
- *scuola superiore, liceo* - senior secondary school (14 to 19).

Education in Italy is state-controlled and all schools, both public and private, must comply with the curricula and teaching methods set by the Ministry of Public Education (*Ministero della Pubblica Istruzione*). Education is compulsory and free of charge for all children between the ages of six and 16-19. It is segmented into: five classes at elementary level; three classes at lower secondary level (middle school); an obligatory two-year period, *biennio*, of general studies at higher secondary level (secondary school); followed by three more years, *triennio*, of optional specialised education.

There are two main types of tertiary education: university and non-university higher education.

Following the Bologna Declaration in 1999, the Italian higher education system has undergone substantial reform. Italy has introduced the so-called '3+2' system which consists of three cycles of academic studies: a three-year degree course leading to the *laurea* (bachelor), followed by a two-year specialist course leading to a *laurea specialistica* (master).

The doctorate aims to provide students with an extended understanding of scientific research methodology after completing a *laurea specialistica*. The course lasts one to two years, and progression is subject to the delivery of an annual report. The doctorate is attained with extensive documentation of research and a final dissertation. Places are restricted to a limited number of applicants.

Higher education in Italy is based on a system in which universities are expected to fulfil the twin tasks of teaching and researching. Academic autonomy and freedom are not only inherent aspects of this approach but also guaranteed by Italian law.

Higher education and research organisations continue to lobby the Italian government to improve opportunities for postgraduate research.

There are 77 universities in Italy. The core Italian university centres are Bologna (the world's oldest founded in 1088), Turin, Rome, Florence, Ferrara, Naples and Milan.

Italian students have traditionally undertaken university studies due to the lack of viable alternatives, with students often emerging from university with qualifications that bear little relevance to the job they finally secure. Shorter, more practical courses would provide students with specific job-related skills that help set them apart from their university counterparts and thus create diversity in the labour market.

English is the most popular foreign language choice, followed by Spanish, French and German. Statistics indicate that 20% of Italians speak basic English, with only 5% speaking it fluently.

3. General Advice for New Zealand Education Providers

Public awareness of opportunities offered in the international education sector is increasing. The number of New Zealand student visas issued to Italian students slightly decreased, to 286, in the 2009/2010 financial year. New Zealand English language providers reported 120 Italian students at their courses in 2009. Approximately 70 Italian students were enrolled in New Zealand tertiary education in 2009 (source: OECD). Statistics New Zealand reports 33 Italian students were enrolled at New Zealand secondary schools in March 2009. However, the annual number of Italian secondary school students in New Zealand is supposedly higher as the majority of Italian secondary students arrive in term three and generally stay for one term only.

There were 623 New Zealand working holiday visas issued to Italians in 2009/10.

Italians generally require extensive information about home-stays, family structure and occupations, and accommodation before final decisions are made.

Most Italian agents for language and school stays are based in Milan, Rome and Turin. The agencies tend to focus on short- or mid-term specialised courses. Only a limited number of Italian agents promote higher education or vocational courses. The market of qualified consultants is undergoing continued expansion and at the same time, a process of regulation. This is clearly shown by the continued importance of the Italian Association of Language Consultants and Agents (IALCA). The aim of this organisation is to regulate and protect education professionals in Italy, because, according to IALCA's president, there are still a significant number of unqualified operators.

There are a small number of New Zealand Specialist Agents based in Italy. Their contact details can be found at www.newzealandeducated.com/nzsait

Among agents, increased publicity both in the press and on the internet still remains secondary in importance to traditional word-of mouth recommendations. Personal contacts and relationships play a very important role in the Italian market and can account for up to half of business.

4. Sector-Specific Advice for New Zealand Education Providers

4.1 Undergraduate and Postgraduate Courses

Tertiary education reform has brought the Italian system more into line with the Anglo-Saxon approach, thereby making it easier to market New Zealand undergraduate and postgraduate courses in Italy. Prior to the reform, undergraduate courses took four to six years to complete, and Italian students usually graduated at the age of 25 or 26. Degree courses now run for three years on average, with an extra two years for Honours and Masters.

In joining the Bologna Process, Italy has agreed to set itself the task of creating a European higher education area to improve the quality of study courses, to enhance employability and to reduce the length of studies. The aim of the Bologna Process is that Europe should grow closer in the field of higher education through qualifications which are comparable across Europe. The process also aims to enhance quality assurance and increase student mobility.

Exchange programmes between Italian and foreign universities are growing more popular and they foster student mobility.

Approximately 32 university exchange agreements (both formal and informal) exist between Italian and New Zealand universities.

4.2 Vocational and Technical Qualifications

A new definition of 'continuing vocational training' has taken on wider importance in Italy since the 1990s and this includes all training-type activities that constitute opportunities to acquire knowledge and skills following initial training.

Italy has a lower educational level than average among OECD countries, and a limited number of workers engage in lifelong learning compared with the rest of Europe. Only 20% of Italian workers take part in training activities (compared to a European average of about 40% of workers), and only 25% of companies offer training (the European average is 60% of companies).

The non-university sector covers fields such as the arts and music (*alta formazione artistica e musicale*), language mediation (*scuole superiori per la mediazione linguistica*), higher technical education and training (*istruzione e formazione tecnica superiore*) and a few more, each of which has its own particular structure, regulations and organisation.

There is a need for more vocational training in Italy and there are specific areas and opportunities in which New Zealand providers could become involved. However, clear challenges exist, such as distance, language, costs and authorisation.

4.3 Secondary Schools

High school programmes abroad are becoming increasingly popular among Italians, with an average stay at such programmes of between one and five months. The success of these programmes is explained by the fact that this is the only study-abroad experience recognised by the Italian Government. Co-educational schools that are strong in certain sports are more likely to attract Italian students.

Some agents adopt the policy of not sending students to New Zealand who are younger than 15.

New Zealand secondary schools are advised to stay in regular contact with Italian agents and support them with material and updates. It is very important to signal interest in the agent's work and to make sure to stay in touch in order to build on this relationship.

4.5 English Language

With 120 Italian enrolments in 2009, the English language sector has felt a slight decline compared to a little peak in 2008.

School groups, university students and executives all make up important client bases in the Italian market, and this is reflected in the good spread of ages of clients. Around 35% of language travellers are under the age of 18, 52% are aged between 19 and 30, and a further 13% are over the age of 31. Education agents place between 9 and 2,000 students in language courses each year.

July and August account for 52% of agency bookings. The average length of stay for Italian students is three weeks. The average student spend on tuition and accommodation per week is approximately 600Euro.

The breakdown of the courses chosen is: general (38%), summer vacation (28%), intensive (12%), junior (9%), work experience (7%), business English (2%), academic preparation (1%) and others (3%).

The executive sector remains important to the Italian market with 10% of clients being executive managers. This sector is characterised by a demand for short but intensive courses, normally in a nearby country such as the United Kingdom.

Providers who wish to succeed in offering English language tuition to Italian students should design courses that are very distinctive, as the sector is very competitive. Students may seek a combination of work experience and English language study, or sports activities and English language study. Italians are keen to combine tourism or sports with the possibility of improving their knowledge of English.

The European summer holiday months (July and August) continue to be most popular times for Italians to travel for English language courses. Fortunately, Italy's summer holiday directly coincides with the third term of primary and secondary schooling in New Zealand, and with short-term language courses in July-September.

Italian agencies receive around half of their business through word-of-mouth, 26% through their websites, 5% from seminars to students, 4% from mailings, 4% via advertising in the press and 15% through other channels.

5. Competitor Activity and Statistics

Although official statistics are not available, it is estimated that 350,000 Italians go abroad each year for study purposes. New Zealand is capturing less than 0.5% of Italy's offshore education market. The vast majority of Italian students coming to New Zealand are from northern Italy and study at English language schools for an average of two months. There is increasing interest for short-term high school stays in New Zealand.

In terms of competitor destinations, the United Kingdom is most popular in Italy's foreign language travel market (45%, down from 55%), followed by Ireland (20%, up from 17%), the United States (11%, down from 14%), Spain (6%), Australia (4%, up from 2%), Canada (2%) and Malta (2%, down from 5%). The United States is the market leader for master's degrees and university specialisation. 'New' destinations such as Australia and potentially New Zealand are becoming more popular.

The British Council has a well established niche in the Italian market. During the northern summer, there are many students (particularly younger ones) who travel to the United Kingdom for intensive

short-term language courses. The emerging market for longer-term sojourns has enabled Australia to establish a presence, and alongside it, New Zealand and South Africa.

Australian figures show that 1,782 Italian students studied in Australia in 2009/2010 (Immigration Australia Statistics), with the majority opting for courses at English language schools and vocational training providers. Higher education and secondary education programmes both have similar levels of interest. Overall, Australia holds a strong brand position in the Italian market, with a very strong position in terms of aspiration intention compared to its competitors.

6. Strategy

The majority of local high school and English language study tour agents feature New Zealand in their catalogues, but some do not. Where possible, New Zealand education providers should meet with their local agent(s) every two years to maintain a close relationship or at least be in touch very frequently to stay in agents' minds.

There is considerable scope to increase student numbers. Unfortunately, little tourism and education promotion of New Zealand takes place in Italy. The Italian market is reliant on promotion being undertaken by agents and by word-of-mouth. The market would benefit from more presentations to agents and to prospective students and their parents.

Education New Zealand has created and manages an Italian page of the www.newzealandeducated.com website. Agents and students can easily be referred to it.

7. Key Dates

Public Holidays 2011

1 January	New Year's Day
6 January	Epiphany
25 April	Easter Monday
25 April	Liberation Day
1 May	Labour Day
2 June	Anniversary of the Republic
15 August	Assumption
1 November	All Saints' Day
8 December	Immaculate Conception
25 December	Christmas Day
26 December	St Stephen's Day

In addition, local holidays are held in honour of town patron saints, generally without closure of shops and offices. These include:

Turin/Genoa/Florence	24 June	St John the Baptist
Milan	7 December	St Ambrose
Siena	2 July and 16 August	Palio Horserace
Venice	25 April	St Mark
Bologna	4 October	St Petronius
Naples	19 September	St Gennaro
Bari	6 December	St Nichola
Palermo	15 July	St Rosalia
Rome	29 June	St Peter
Trieste	3 November	St Giusto

The latest Public Holiday information can be found at <http://www.worldtravelguide.net/italy/public-holidays>

8. Helpful hints

- Italians prefer co-ed schools, with numerous agents adopting the policy of not sending students to single-sex schools. Generally speaking, Italians tend not to distinguish between private and public schools when sending their children to New Zealand.
- Generally speaking, Italians are very family orientated, and parents maintain a decisive position of authority in the lives of their offspring for an extended period of time (in comparison to New Zealand). As a result, some agents adopt the policy of not sending students younger than 15 to New Zealand.
- Host family accommodation is the preferred choice for 61% of Italian students. Italians generally require extensive information about home stays, family structure, occupations and accommodation, often requesting direct telephone contact with potential families before making final decisions.
- Italians are hard-working, resilient, resourceful, self-confident and optimistic people with a good sense of humour and a strong distrust of authority. You will find that they are passionately loyal to their friends and families. They can also be parochial, and frequently identify largely with their region or even hometown.
- Italian business etiquette is relatively formal, particularly at the outset. Try, if you can, to establish a relationship of trust before entering negotiations and be prepared to dissuade fears that New Zealand is too far away. Also, be aware that when confronted with what they consider a silly rule or an unjust law, Italians rarely complain or attempt to change rules, but rather try to find the quickest way around them.
- You must allow time for hospitality in Italy. If an appointment is fixed for late morning, expect lunch. The style of restaurant is crucial and will reflect the relationship; top class for new and important contacts or middle level for old friends. Paying can equate to prestige, Italians may slip the waiter a tip before dinner to ensure you do not get the bill. An offer to pay, if declined, should always be repeated. Only get down to business nitty-gritty after eating.



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