Felca Members Association

Annual Report

2025 season

Associations detailed in this report

ARSAA
ARGENTINE STUDY ABROAD ASSOCIATION

ABELIO
ASSOCIATION OF BELGIAN EDUCATION & LANGUAGE IMMERSION OPERATORS

Belta
EXCELLENCE IN STUDY ABROAD
SINCE 1992

FDSV
Quality Language Learning

IECA

UED
Uluslararası Eğitim Danışmanları Derneği

IALCA
Consultants and Agents
Italian Association of Language

JAOS

aseproce

unosel
CONFIANCE QUALITÉ RÉSULTATS

Agencias anex
Asociación Nacional de Empresas para Estudios en el Exterior

KIEA

AMATE®

* Please note not all Felca members participated in the 2025 Annual Report

Countries detailed in this report

1. Argentina
2. Belgium
3. Brazil
4. Germany
5. Italy
6. Japan
7. South Korea
8. Mexico
9. Spain
10. Taiwan
11. Turkey
12. France
13. Colombia



Argentina

Agencies operating in Argentina:

approximately 50

24

are members of ARSAA

Argentina

*In **2025:***

Total from your association:

Language Students	Student Weeks	High School Students	University Students
1,438	4,314	137	17

Argentina

Language		Visa Refusal Rate	High School		Visa Refusal Rate	Higher Education		Visa Refusal Rate
UK	40%	N/A	UK	-	-	UK	-	-
USA	14%	N/A	Ireland	-	-	New Zealand	-	-
New Zealand	10%	N/A	New Zealand	-	-	Canada	-	-
Canada/Ireland	8%	N/A						

Argentina

Developments

- 2026 demand outlook: Language programs show a generally softer outlook, with 11 agencies reporting lower demand, 9 similar demand and 3 higher demand than 2025.
- Commercialisation remained limited in 2025, with 20 of 24 agencies reporting no online or hybrid international programs and only 4 indicating a minor presence.
- The biggest challenge for 2026 is converting enquiries into enrolments (identified by 7 agencies), followed by generating new student leads and airfare/air connectivity costs (both cited by 5 agencies).

Belgium

Trends

- Membership remains stable over the past year. Reflects continued commitment to cooperation and professional standards.
- Members continue to share market intelligence, experience and best practice and industry developments. Stability provides a strong foundation for future initiatives.
- Guidelines seen as an important tool to strengthen professional standards, improve transparency and build trust and confidence.

Belgium

Developments

- ABELIO members will participate in the Quality English Mission in Paris on 15 October 2026.
- Networking lunch on 14 October with participating schools and ABELIO members.
- Continue promoting professional standards and FELCA Guidelines.
- Create practical networking opportunities for members.
- Maintain ABELIO's visibility and representative role in Belgium.
- Continued close cooperation with FELCA and fellow national associations.

Brazil

Agencies operating in Brazil:

approximately 800

114

are members of Belta

Brazil

*Top Destinations in **2025***

Language	High School	Higher Education
Canada – 15.9%	Canada – 24.8%	Canada – 21.7%
United States – 12.5%	United States – 19.6%	United Kingdom – 18.2%
United Kingdom – 12.3%	United Kingdom – 12.3%	United States – 14.4%
Ireland – 11.2%		

Brazil

Trends

- Canada, the US, the UK and Ireland remained the top four destinations in the 2025 agent survey.
- Malta climbed to 5th, while Australia slipped to 6th, likely due to recent visa policy changes.
- Spain jumped from 9th to 7th, while New Zealand held steady in 8th.
- Italy entered the top 10 (11th to 9th), reflecting growing interest in European destinations among Brazilian students.

Visa regime

- Strengthened partnerships with key consulates and embassies while expanding ties with emerging destinations like Finland and Hungary.
- It also delivered visa training to keep agents up to date.
- Canada, Australia, Ireland and others tightened visa and immigration rules. In response, Belta agencies enhanced student screening and counselling to improve student–destination matching and support stronger visa outcomes.

Brazil

Developments

- Launched EI Magazine! 2025 nationally in São Paulo and regionally in Florianópolis and Belo Horizonte, alongside professional development training with English UK.
- Distributed EI Magazine! at major ENEM events across seven Brazilian cities and through study-abroad influencers nationwide.
- Strengthened international relationships through regular meetings with governments, consulates, embassies, and education associations.
- Expanded Belta's digital presence with daily content on Instagram, Facebook, TikTok, LinkedIn, and ongoing BeltaCast episodes.
- Ran influencer campaigns promoting international education, including a partnership focused on Ireland with Emerald Culture Institute.

Brazil

Developments Cont.

- Published new market research on Brazilian international education trends and student profiles from January–December 2025.
- Launched the Belta Seal Research 2025 in partnership with British Council, reaching both in-person and online audiences.
- Promoted ethical collaboration through a global campaign, a Direct Sales Working Group, and the One Paper best-practices guide.
- Represented Belta at major industry events including Alphe Brazil, ICEF Brazil, ICEF Berlin, and other leading B2B and B2C fairs.
- Delivered member training and governance initiatives, including sales workshops, visa training, and ongoing reinforcement of the Belta Code of Ethics.
- Advanced strategic and social impact projects through government relations in Brasília and a scholarship programme with Instituto Semear supporting five underprivileged students.

FDSV Quality Language Learning Germany

felca

Agencies operating in Germany:

approximately 50

16

are members of FDSV

FDSV Quality Language Learning Germany

felca

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
23,728	47,114	N/A	N/A

*Overall market growth compared to 2024: **+44.63%***

FDSV Quality Language Learning Germany

felca

*Top Destinations in **2025***

Language
UK – 38.89%
Malta – 24.96%
Spain – 12.25%
France – 9.09%

FDSV Quality Language Learning Germany

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Trends

- FDSV member companies recorded a significant increase in participant numbers of 44.20% compared with the previous year.
- At the same time, total revenue declined by 4.63%, indicating structural changes in booking behaviour.

Developments

- Since 2025, we have offered an annual fam trip to give participants the opportunity to get to know our German member schools.

Italy

Agencies operating in Italy:

approximately 340

28

are members of IALCA

Italy

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
33,000	102,000	1,450	55

*Overall market growth compared to 2024: **- 5%***

Italy

*Top **5** Destinations in **2025***

Language	
UK	**42%**
Ireland	**16%**
Spain	**10%**
Malta	**10%**
Germany	**3%**

High School	
UK	-
Canada	-
USA	-

Higher Education	
UK	-
USA	-
Spain	-

Italy

Trends

- 2025 v 2024 showed a decrease in adult bookings and summer camps, a growth in mini stays and high school programmes.

Visa Regime

- Italian students do not need visas for short-term courses to most major destinations.

Italy

Developments

- All IALCA members have been actively participating in meetings, reinforcing the collaboration.
- During these meetings IALCA invited several institutional guests.
- Regular contacts have been maintained with the Italian Ministry of Education.
- The 6th Salone delle Lingue IALCA was held in Rome on the 25th and 26th October 2025.

JAOS Japan

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Agencies operating in Japan:

approximately 200

41

are members of JAOS

JAOS Japan

felca

*Top **5** Destinations in **2025***

Language		Visa Refusal Rate	High School		Visa Refusal Rate	Higher Education		Visa Refusal Rate
Australia	**19%**	Very Small %	New Zealand	**56%**	Very Small %	Australia	**38.9%**	Small %
Taiwan	**17%**	0%	Canada	**16.9%**	Very Small %	USA	**24.1%**	Small %
USA	**13%**	Small %	Australia	**14.5%**	Very Small %	Malaysia	**19.4%**	0%
Singapore	**9.6%**	0%						

JAOS Japan

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Developments

- Launched JAOS Study Abroad Research Institute (JSARI) – Japan's first think tank dedicated to study abroad, supporting the country's 2033 international mobility goals.
- Hosted the JAOS Study Abroad Fair 2026 – Brought together 21 study abroad agencies under one roof, attracting significantly more visitors than the previous year.
- Convened the 29th JAOS/FGER Information Exchange Meeting – Held in a hybrid format with embassies and education to share the latest updates on visas, entry requirements, and education systems.

JAOS Japan

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Trends

- A total of 168,931 Japanese students studied abroad through 41 JAOS member organizations in 2025.
- School and university programs made up the majority of study abroad, with Taiwan leading for secondary schools and Australia for universities.
- Independent study abroad dropped to 56% of 2024 levels, driven by rising costs, the weak yen, inflation, and changing immigration policies.
- Australia remained the most popular destination for the second consecutive year, ranking first across secondary schools, universities, and individual study abroad.
- Taiwan, Singapore, the Philippines, and Malaysia gained popularity thanks to affordability, proximity, and expanding English-language education options.
- New Zealand remained the top destination for private and exchange high school programs, with Canada and Australia completing the top three.

AMTE® Mexico

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Agencies operating in Mexico:

approximately 100

57

are members of AMTE

AMTE® Mexico

felca

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
4,500	35,000	600	1,300

AMATE® Mexico

felca

*Top **5** Destinations in **2025***

Language		Visa Refusal Rate	High School		Visa Refusal Rate	Higher Education		Visa Refusal Rate
UK	**32%**	0%	Canada	**30%**	10%	Canada	**30%**	15%
Canada	**26%**	14%	USA	**30%**	3%	Germany	**15%**	0%
USA	**15%**	5%	UK	**20%**	0%	Ireland	**15%**	0%
Ireland	**9%**	0%	Others	**20%**	0%	USA	**15%**	3%
France	**7%**	1%	-	**-**	-	UK	**10%**	0%
Others	**11%**	0%	-	**-**	-	Others	**20%**	1%

AMATE® Mexico

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Trends

- Student numbers appear to be relatively stable overall, although there are differences by program.
- Summer camps have shown a slight increase, while language, high school and higher education programs have experienced some decline compared with 2024.
- These are preliminary trends, as we are still waiting for some agencies to submit their data. We will have a more accurate picture once the full statistics are consolidated.

Visa

- Increase in visa difficulties for Canada, particularly for students applying for language, high school and higher education programs.
- Canada currently shows higher refusal rates compared with other major destinations in our preliminary data. Some agencies have also reported greater scrutiny regarding the student's intention to return to Mexico after completing the program.
- We are still collecting information from some agencies, so these findings should be considered preliminary.

AMTE® Mexico

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Developments

- AMTE has continued to focus on the professionalization and development of the Mexican educational tourism industry.
- Professional training and educational programs for our members.
- Strengthening relationships with embassies, government representatives and international education organizations.
- Developing sector statistics and market information to better understand trends in Mexican students travelling abroad.
- Increasing networking opportunities and collaboration between agencies, schools, providers and other industry stakeholders.
- Working on new initiatives to strengthen the AMTE brand and provide greater value and visibility to our members.

aseproce Spain

felca

Agencies operating in Spain:

approximately 400

72

are members of Aseproce

aseproce Spain

felca

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
50,500	2.5	4,700	300

Total from your country:

Language Students	Student Weeks	High School Students	University Students
100,000	2.5	8,000	1,500

*Overall market growth compared to 2024: **-3.4%***

aseproce Spain

felca

*Top **5** Destinations in **2025***

Language		Visa Refusal Rate	High School		Visa Refusal Rate	Higher Education		Visa Refusal Rate
Ireland	**35%**	-	USA	**60%**	3%	Europe	**65%**	-
UK	**25%**	-	Canada	**20%**	-	USA	**25%**	-
USA	**20%**	3%	Ireland	**20%**	-	UK	**10%**	-
Canada	**15%**	-	-	**-**	-	-	**-**	-
Rest of Europe	**5%**	-	-	**-**	-	-	**-**	-

Spain

Trends

- Spain's Summer Programs saw a significant decline in 2025, reflecting a more challenging market for short-term language travel.
- Academic Year programs remained broadly stable despite increasing competition and continue to represent the strongest segment of the sector.
- Interest in Higher Education opportunities in Europe is growing, particularly among students seeking degree and pathway programs.
- The inbound market showed positive momentum, with Spain continuing to strengthen its position as an attractive destination for international students.

Visa Regime

- There have been no changes, with only the usual requirements for study permits and student visas remaining in place.
- The main exception has been the United States, where visa processing has become more stringent.

aseproce Spain

felca

Developments

- Represented and defended the international education sector.
- Strengthened ASEPROCE's role as a trusted quality benchmark.
- Ensured compliance with sector quality standards.
- Reinforced the ASEPROCE Standard as the leading quality framework.
- Updated certification criteria to reflect market changes.
- Expanded focus on compliance, customer experience, and digitalisation.
- Developed a new quality standard for Higher Education programmes.
- Consolidated Circle as a platform for member collaboration.
- Welcomed new member agencies and strengthened sector representation.
- Launched the ASEPROCE Data Platform to improve market insights.
- Introduced ASEPROCE Insights to share industry knowledge.
- Increased visibility through stronger communications and media presence.
- Received the ST Secondary School Award for the fourth time.
- Strengthened relationships with institutions, partners, and public authorities.
- Hosted a sold-out 14th ASEPROCE Workshop in Madrid.
- Renewed partnerships and expanded corporate collaborations.

Taiwan

Agencies operating in Taiwan:

approximately 450

160

are members of IECA

Taiwan

University Students (holding student visas to stay in those countries) by destination

Destination	Number of Students	% of your students
USA	23,263	34.17%
Australia	14,014	20.59%
Japan	7,655	11.25%
Canada	6,510	9.56%
UK	4,380	6.43%

*Overall market growth compared to 2024: **+ 7.54%***

Taiwan

*Top **5** Destinations in **2025***

Language
Canada
Japan
USA
UK
Republic of the Philippines

High School
USA
Canada
Japan
UK
New Zealand

Higher Education	
USA	**34.5%**
Japan	**17.20%**
Australia	**13.95%**
UK	**10.62%**
Canada	**9.56%**

Taiwan

Trends

- Political situation and safety concerns are influencing student and parent in their choices.
- It is harder to obtain a visa or it takes a long time to wait, which will be an ordeal for students.

Developments / Initiatives

- Memorandum of Understanding (MOU) with LANGUAGE CANADA, Quality English (QE) and IALC.
- Fam trip to Malaysia.

Turkey

Agencies operating in Turkey:

approximately 700

40

are members of UED

Turkey

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
13,800	99,000	400	8,000

Total from your country:

Language Students	Student Weeks	High School Students	University Students
23,000	120,000	1000	30,000

Turkey

*Top **5** Destinations in **2025***

Language		Visa Refusal Rate	High School		Visa Refusal Rate	Higher Education		Visa Refusal Rate
UK	**65%**	7%	UK	**60%**	0%	UK	**40%**	0%
Germany	**15%**	5%	Canada	**20%**	0%	Germany	**20%**	1%
Ireland	**5%**	10%	France	**8%**	0%	Italy	**15%**	0%
Malta	**3%**	10%	-	**-**	-	-	**-**	-

Turkey

Trends

- The UK remains one of the strongest and most established destinations, particularly for university education, summer programmes and pathway studies.
- At the same time, we are seeing growing interest in European destinations such as Germany, the Netherlands, France and Italy.
- Cost, visa procedures, employability and the availability of English-taught programmes are increasingly important factors for families when choosing a destination.

Turkey

Visa Regime

- Visa issues have become one of the biggest challenges for Turkish students.
- Limited appointment availability, long waiting times and uncertainty around processing.
- Governments need to manage migration while strengthening their visa systems and ensuring a workable system for genuine students.

Developments

- UED continues to communicate these concerns with embassies and relevant authorities and to share accurate information with our members.
- There are occasions we cannot get a response to requests for a meeting to discuss the challenges we are experiencing and provide feedback from the sector.
- We fully understand the pressure embassies are under, but regular dialogue is very important. Ultimately, we believe the solution is not less mobility, but a more predictable, transparent and accessible process for genuine students.

Colombia

Agencias anex
Asociación Nacional de Empresas para Estudios en el Exterior

felca

Agencies operating in Colombia:

approximately 150

34

are members of ANEX

Agencias anex Colombia

Asociación Nacional de Empresas para Estudios en el Exterior

felca

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
2,782	45,910	617	1,122

Total from your country:

Language Students	Student Weeks	High School Students	University Students
5,059	83,473	1,122	3,253

Agencias anex Asociación Nacional de Empresas para Estudios en el Exterior Colombia

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*Top **5** Destinations in **2025***

Language		Visa Refusal Rate	High School		Visa Refusal Rate	Higher Education		Visa Refusal Rate
Canada	**25%**	<2%	Canada	**65%**	<2%	Canada	**45%**	<2%
Australia	**20%**	<2%	UK	**20%**	<2%	Australia	**20%**	<2%
EEUU	**5%**	<2%	EEUU	**18%**	<2%	Spain	**20%**	<2%
Malta	**18%**	<2%	-	**-**	-	UK	**10%**	<2%
Others	**17%**	<2%	-	**-**	-	-	**-**	-

Colombia

Trends

- Student numbers: Overall decline expected to continue through 2026.
- Competition: Market becoming more fragmented and competitive, creating greater volatility.
- Destinations: Main destination rankings remain relatively stable; Canada continues to lead.
- Short-term peaks: Temporary increases do not indicate sustained market growth.
- New destinations: Growing interest in Europe and Asia is diversifying student choices.
- Key priority: Stronger agency–institution collaboration, reliable market intelligence and flexibility are increasingly important.
- Industry role: Associations remain important in connecting stakeholders and supporting the evolving international education market.

Agencias anex Colombia

Asociación Nacional de Empresas para Estudios en el Exterior

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Visa Regime

- Reported visa refusal rates across the main destinations were below 2%.
- These figures should be considered indicative and may vary according to student profile, programme type, institution and visa category.

Developments

- Strategic role: Moving beyond representation to professionalization and value creation.
- Knowledge & training: Leadership, market updates, research and ANEX Library.
- Partnerships: Stronger links with institutions and industry partners.
- Collaboration: Improving agency–institution relationships and transparency.
- Goal: A more connected, sustainable ecosystem.

France

Agencies operating in France:

approximately 75

51

are members of UNOSEL

France

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
26,700	-	-	-

France

*Top Destinations in **2025***

Language		Visa Refusal Rate
UK	**50%**	-
France	**15%**	-
US/Canada	**9%**	-
Malta	**8%**	-

France

Developments

- Our association has recently focused its efforts on several key issues, including safeguarding and mental health.

KIEA KIEA

felca

Agencies operating in Republic of Korea (South Korea):

approximately 150

59

are members of KIEA

KIEA KIEA

felca

*In **2025:***

By your association:

Language Students	Student Weeks	High School Students	University Students
5,200	78,000	1,100	900

Total from your country:

Language Students	Student Weeks	High School Students	University Students
12,000	180,000	2,500	2,200

*Overall market growth compared to 2024: **+5%***

KIEA KIEA

felca

*Top **5** Destinations in **2025***

Language		Visa Refusal Rate	High School		Visa Refusal Rate	Higher Education		Visa Refusal Rate
USA	**35%**	2%	USA	**50%**	2%	USA	**40%**	2%
UK	**25%**	1.5%	UK	**20%**	1%	UK	**25%**	1.5%
Canada	**15%**	2%	Canada	**15%**	2%	Canada	**15%**	2%
Australia	**15%**	1%	-	**-**	-	-	**-**	-

KIEA KIEA

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Trends

- The Korean outbound market continued to recover in 2025, growing by an estimated 5%.
- Demand was strongest for degree, pathway, and academically focused high-school programmes.
- Short-term language study recovered gradually due to higher tuition, housing, and airfare costs.
- Trump-related uncertainty, the strong U.S. dollar, and visa-policy changes affected demand for the U.S.
- Some students shifted their interest toward Canada and the United Kingdom as a result.

Visa Regime

- Canada: lower study-permit targets, broader PAL/TAL rules and tighter work eligibility.
- Australia: closer Genuine Student, financial-capacity and English assessment.
- UK/USA: higher financial requirements and, in some cases, longer visa processing

KIEA

Developments

- KIEA maintained approximately 60 member agencies throughout 2025.
- Strict admission standards preserved quality; applications from 18 agencies were not approved.
- Approximately 40 events were held, including school seminars and familiarisation trips.
- The programme also included member marketing training and networking events.
- KIEA operates pavilions at Korea's largest study-abroad fairs four times each year.





Thank you for your time!