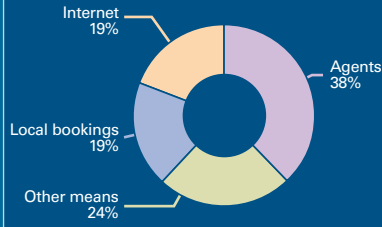


USA 2007

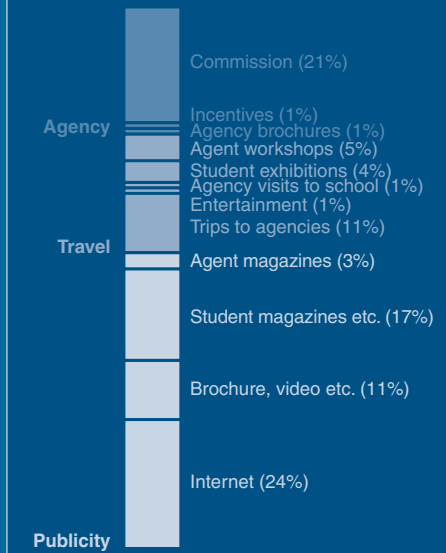
Means of recruiting students in the USA, 2007



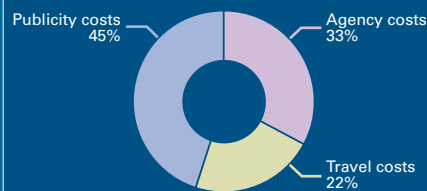
Intensity of study (hours studied per week)



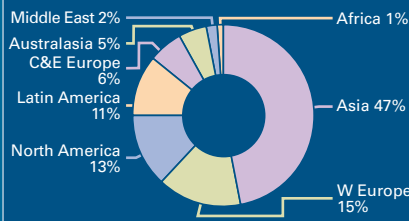
Marketing spend by category (from a selection of schools)



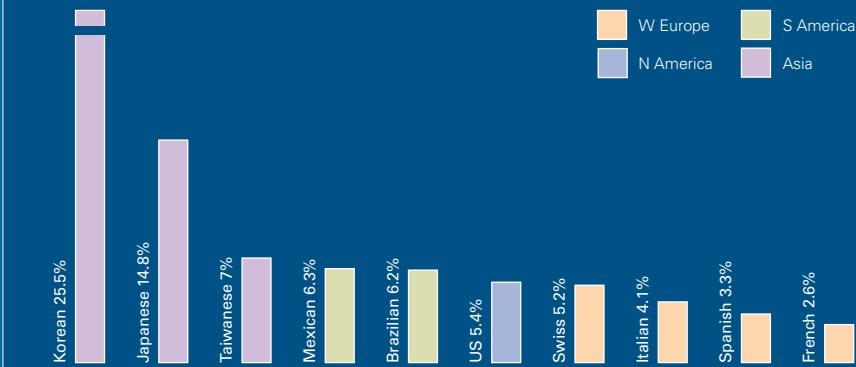
Total marketing spend by sector in %



Marketing budget by region (overall %)



Top nationalities in the USA by student weeks, 2007

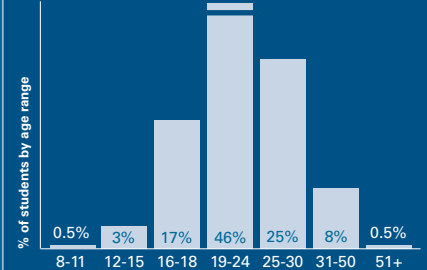


Key points

- Number of participating organisations in the USA survey: **25**
- Total number of students at the organisations in 2007: **46,230**
- Total number of student weeks in 2007, estimated: **559,383**
- Overall average length of stay in weeks: **12.1**
- Average cost of a one-month course, excluding accommodation: **US\$1,189**
- Average cost of residential accommodation per week: **US\$241**
- Average cost of host family accommodation per week: **US\$208**
- Average commission paid on a language course: **18.5 per cent**
- **Three** institutions paid commission on accommodation (of between five and 10 per cent)

*For currency conversion rate, see page 7.

Student numbers by age range



Observations

- Eight more language schools in the USA participated in this month's Status survey, compared with last year, and the number of students represented by the schools increased from 12,473 in 2006 to 46,230 in 2007.
- Agency usage is gaining in strength in the US market, representing 38 per cent of the overall recruitment sector compared with 24 per cent in 2006. However, agency costs made up just 33 per cent of the sector's total marketing spend, with

more money spent on publicity campaigns, up 11 percentage points to 45 per cent.

- Asia continues to dominate things in the nationality stakes, with Korea, Japan and Taiwan securing the top three positions. However, Saudi Arabia, accounting for 10.9 per cent of the student base in 2006, did not feature in the top 10 in this more recent survey. Interestingly, 5.4 per cent of the market share were in fact US students whose first language was not English.

Thank you to the following institutions for taking part in our Status survey: Academia Language School, Honolulu, HI; Arizona State University AECR, Tempe, AZ; Ball State University, Muncie, IN; Boston School of Modern Languages, Boston, MA; Brandon College, San Francisco, CA; California State University Long Beach ALI, Long Beach, CA; Boston University CELOP, Boston, MA; Central Washington University, UESL Program, Ellensburg, WA; Diablo Valley College IEC, Pleasant Hill, CA; El Paso Community College, El Paso, TX; Embassy CES, various; English for Internationals, Atlanta, GA; English Language Center, Boston and Los Angeles; Illinois State University ELI, Normal, IL; Intercultural Communications College, Honolulu, HI; International House, San Diego, CA; Intrax International Institute, San Francisco, CA; Maryville College, Maryville, TN; North Dakota State University, Fargo, ND; Rennert Bilingual, New York, NY; Selnate International School, Provo, UH; University of California, San Diego Extension International Programs, La Jolla, CA; University of California, Irvine Extension, Irvine, CA; University of Nevada IELC, Reno, NV; University of Pennsylvania ELP, Philadelphia, PA.

If you would like to see the complete breakdown of data, please visit www.hothousemedia.com/statuszone/ltmstatus/latest.htm where this information is available. Thanks to all the schools that contribute valuable data – confidentially – to help us produce this market information.

Status Survey statistics are based on figures supplied by a selection of individual schools. Not all survey respondents answered every question in the survey. Figures are, in some cases, rounded up or down to the nearest whole. All information is treated with the strictest confidence.

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September 8: Undergraduate Programmes and Diploma Courses, HURON University London

September 25, January 8: EF Brittin College University Foundation Year, Pre-Master Programme, Pre-MBA Programme; Cambridge, London, Manchester, New York, Santa Barbara, Sydney



EF Brittin College:

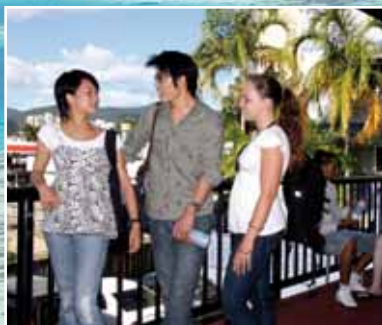
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