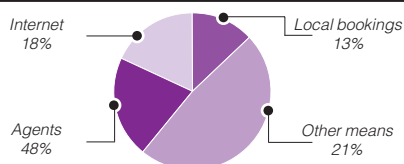


Status: Italy 2003

The Status survey is a venture by *Language Travel Magazine* that aims to gather specific market data about all of the main language teaching markets in the world. Through our initiative, it is now possible to compare world market statistics.

If you would like to see the complete breakdown of data, including marketing spend per region and marketing budget analysis, and you are an agent (or a school that has completed or intends to complete the Status survey), please send us an email containing "Status survey web address" in the subject heading. We will then forward the web address to you.

Means of recruiting students in Italy, 2003



Intensity of study (hours studied per week)

Overall average

22.5

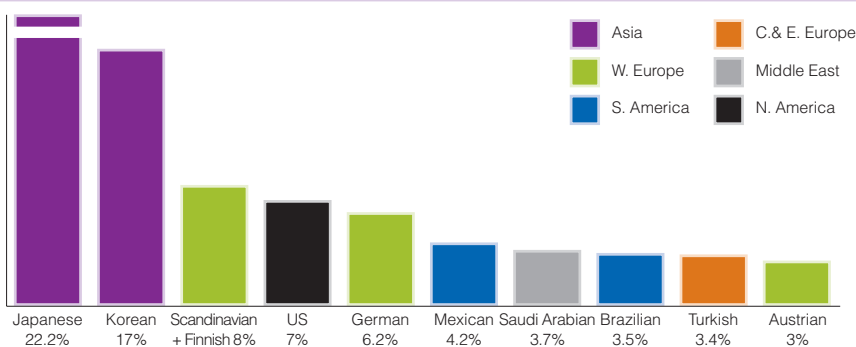
15 ————— 40

Key points

- Number of participating organisations in the Italian survey: **9**
- Total number of students at the nine organisations in 2003: **5,774**
- Total number of student weeks in 2003, estimated: **24,251**
- Overall average length of stay in weeks: **4.2**
- Average cost of a one-month course, excluding accommodation: **€544 (US\$658)**
- Average cost of residential accommodation per week: **€137 (US\$166)**
- Average cost of host family accommodation per week: **€202 (US\$244)**
- Average commission paid on a language course: **20 per cent** (from 4 to 20)
- **Two** institutions paid commission on accommodation (from 5 to 10 per cent)

*For currency conversion rate, see page 6.

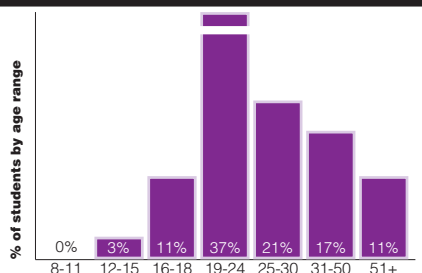
Top student nationalities in Italy by student weeks, 2003



Observations

- Although a different range of schools took part in our survey, compared with the previous Italian Status survey (see LTM, October 2003, page 44), prices remain comparable year on year for both tuition and accommodation.
- Japanese students overtook Americans to be in the number-one position this year, while the US market share dropped from almost 20% to 7%. German and British market share in terms of student weeks was also down on last year, while Koreans figured in the top ten for the first time.
- The average length of stay crept upwards from last year's figure of 3.5 weeks to 4.2 weeks.
- Agent usage doubled from just 23% last year to 48%, while Internet bookings dropped. This could be explained by the different range of schools in our survey.

Student numbers by age range



Thank you to the following institutions for taking part in our Status survey:

Accademia del Giglio, Florence; British Institute of Florence, Florence; Giacomo Leopardi Center, Belforte All'Isauro; Istituto Il David, Florence; Lingua Si, Orvieto; Linguaviva, various; Omnilingua, Sanremo; Rimini Academy, Rimini; Il Sillabo, San Giovanni Valdarno.

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.

**Next month:
New Zealand**