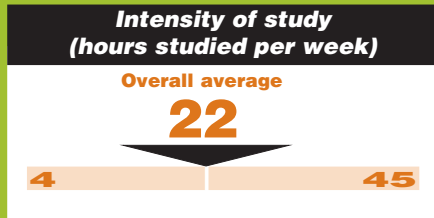
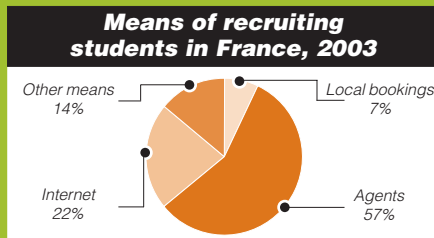


Status: France 2003

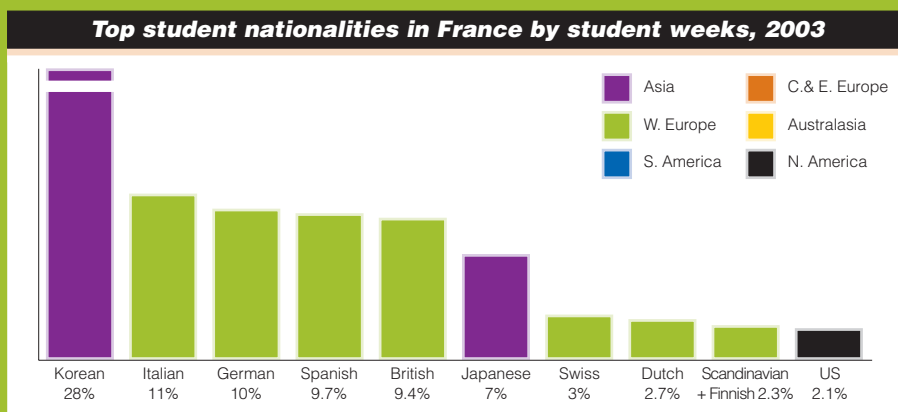
The data provided on the Status pages represents the world's only truly comparable statistics for the language travel industry. This information is only available to agents and education institutions that plan to participate in our Status surveys, which are carried out on a regular basis.



Key points

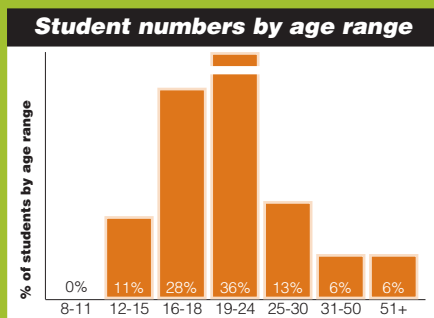
- No. of participating organisations in the French survey: **9**
- Total no. of students at 8 of the 9 organisations in 2003: **6,872**
- Total no. of student weeks in 2003, estimated: **22,000**
- Overall average length of stay in weeks: **3.2 weeks**
- Average cost of a one-month course, excluding accommodation: **€875 (US\$1,075)**
- Average cost of residential accommodation per week: **€193 (US\$237)**
- Average cost of host family accommodation per week: **€189 (US\$232)**
- Average commission paid on a language course: **17.8 per cent** (from 15 to 25)
- **Three** institutions paid commission on accommodation

*For currency conversion rate, see page 6.



Observations

- The average length of stay has dropped to 3.2 weeks, from the 7 weeks recorded last year (see LTM, June 2003, page 40). Although one explanation may be that fewer schools took part in our survey, all the schools surveyed reported an average stay of less than 7 weeks.
- Prices were very similar to last year's prices, with the cost of one month of tuition only €5 more. The exchange rate has altered so the euro works out as a slightly higher price in US\$.
- Korean students were at the top of the nationality table this year, although this may be influenced by high numbers of Koreans at one particular school. Other than that, Western Europe remained the strongest recruitment region, with Italians in number-two position this year.
- Agent usage has crept up from 40% to 57% this year.

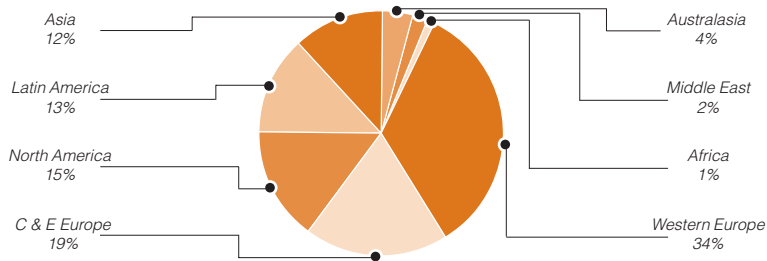


Thank you to the following institutions for taking part in our Status survey:
 Alliance Française Rouen, Rouen; BLS, Bordeaux; Centre Normandie, Lisieux; ELIT-Groupe St Denis, Loches; French in Normandy, Le Petit Quevilly; Institut Linguistique Adenet, Montpellier; Pluriel Langues, Nice; SILC, various; Tours Langues, Tours.

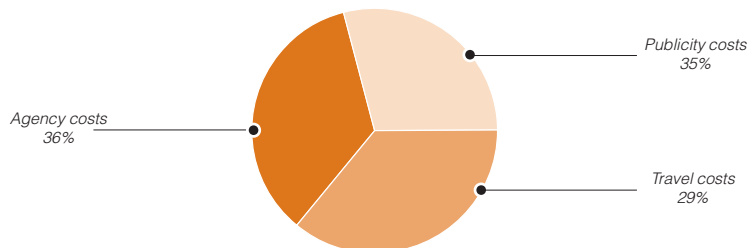
Status Survey statistics are based on figures supplied by a selection of individual schools. Not all survey respondents answered every question in the survey. Figures are, in some cases, rounded up or down to the nearest whole. All information is treated with the strictest confidence.

Next month: USA

Marketing budget by region



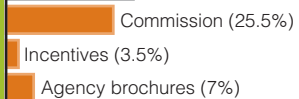
Marketing budget by sector



Marketing spend by category

Total spend by sector in %

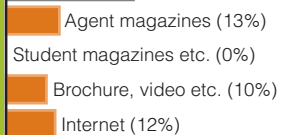
Agency



Travel



Publicity



Marketing spend as % of school's gross income

Overall average
7.5%



Average cost of tuition

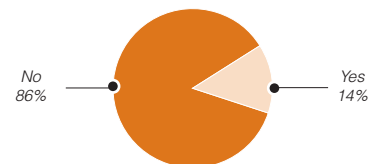
For 80 hours of tuition

Overall average
€875
(US\$1,075)



(Costs for one hour of tuition ranged from US\$8.2 to US\$15 per hour, average US\$13.4)

% of institutions offering/selling travel insurance



Annual student intake in France by world region of origin

