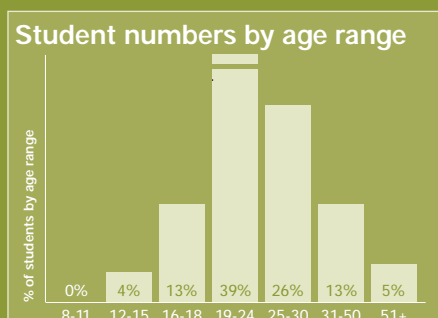
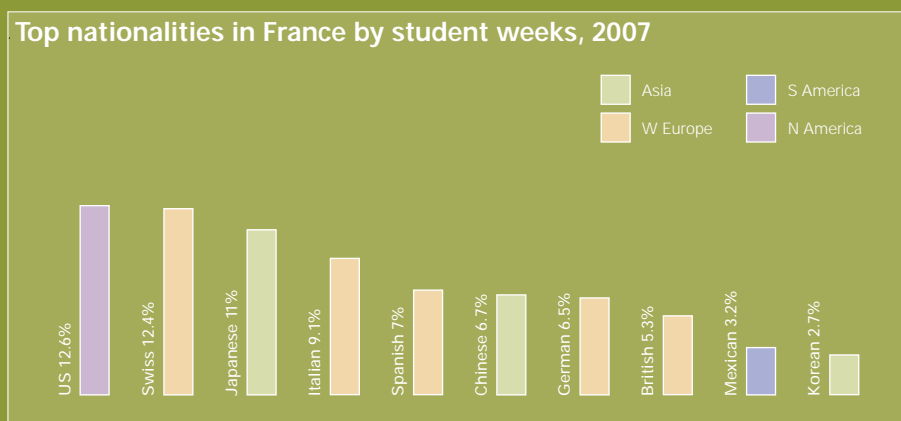
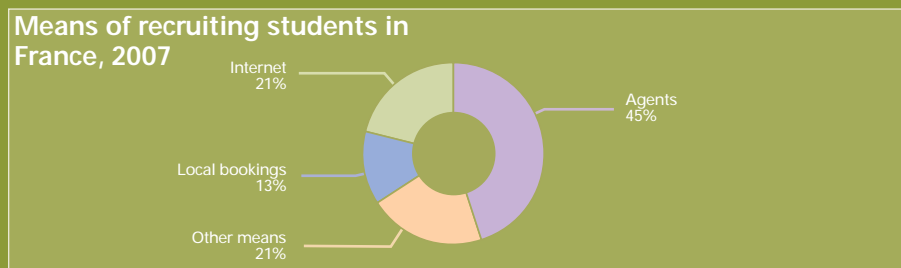


Status: France 2007

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, 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.



Key points

- Number of participating organisations in the France survey: **20**
- Total number of students at the organisations in 2007: **25,590**
- Total number of student weeks in 2007, estimated: **143,304**
- Overall average length of stay in weeks: **5.6**
- Average cost of a one-month course, excluding accommodation: **€911 (US\$1,437)**
- Average cost of residential accommodation per week: **€201 (US\$317)**
- Average cost of host family accommodation per week: **€207 (US\$326)**
- Average commission paid on a language course: **21 per cent**
- **Three** institutions paid commission on accommodation (averaging **eight per cent**)

*For currency conversion rate, see page 7.

Observations

- Students from Western Europe appear to be more numerous than any other continent, however, the USA clung on to the top nationality spot with a 12.6 per cent share of the market. Interestingly, Mexican and Korean students, not placed in 2006, made their debut this year with a 3.2 per cent and 2.7 per cent share respectively.
- 45 per cent of all new business sourced. This trend was also reflected in total marketing spend by sector, where agency costs grew by 11 percentage points to 37 per cent.
- 25-to-30 year olds continue to grow as an age group, up from 18.5 per cent to 26 per cent in 2007. But the number of 12-to-15 year olds studying in France dropped by 13 percentage points to just four per cent.
- Agent usage increased by four percentage points this year, accounting for

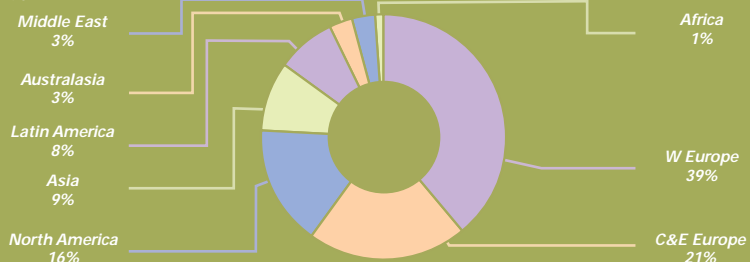
Thank you to the following institutions for taking part in our Status survey: Accent Français, Montpellier; Alliance Française Nice, Nice; Alliance Française de Rouen, Rouen; Cavilam, Vichy; Centre International d'Études Françaises, Angers; Centre International des Langues, Manosque; College International de Cannes, Cannes; Ecole France Langue, Paris; Ecole Perl, Paris; Ecole Suisse Internationale, Paris; Ecole de Langue Française pour Etrangers (ELFE), Paris; French in Normandy, Rouen; Idiom, Nice; Institut Cesar Langues, Montpellier; Institut de Langue Française, Paris; Institut Linguistique Adenet, Montpellier; Institute Savoisien d'Études Françaises pour Etrangers (ISEFE), Chambéry; International House, Nice; Langues Sans Frontières, Montpellier; Silc, Angoulême.

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:
Australia**

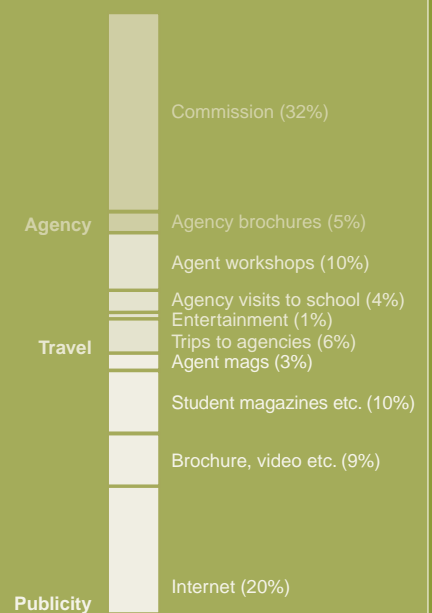
Marketing budget by region

overall %

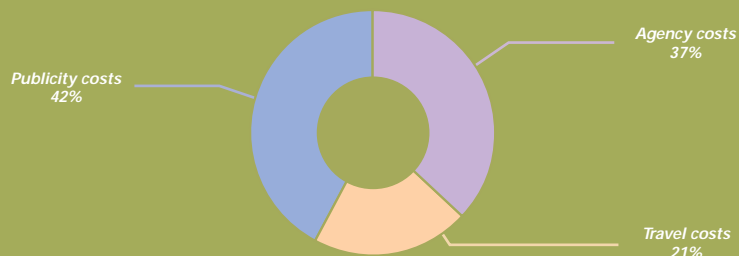


Marketing spend by category

based on sample of schools



Total marketing spend by sector in %



Marketing spend as % of school's gross income

Overall average

11.3%

5% - 28%

Average cost of tuition

For 80 hours of tuition

Average

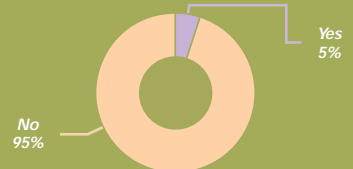
€800 (US\$?)

€480

€1760

(Costs for one hour of tuition ranged from €6 (US\$?) to €22 (US\$?) per hour, averaging €10 (US\$?))

% of institutions offering/selling travel insurance



Annual student intake in France by world region of origin

