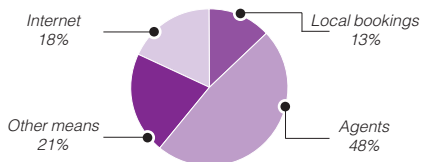


Status: Italy 2003

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.

Means of recruiting students in Italy, 2003



Intensity of study (hours studied per week)

Overall average

22.5

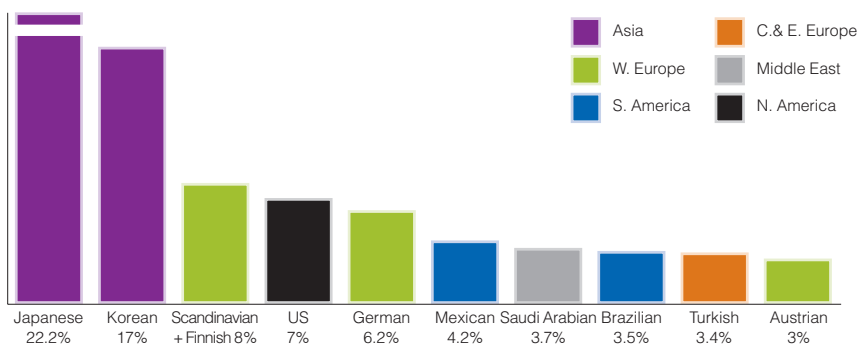
15 ————— 40

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)

Currency conversion rate, as of 07/09/04. 1US\$ = €0.827

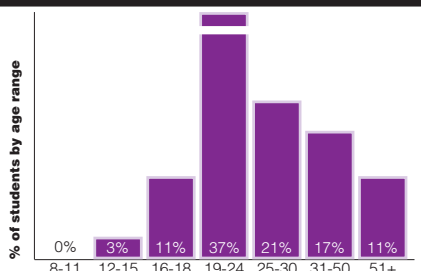
Top student nationalities in Italy by student weeks, 2003



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



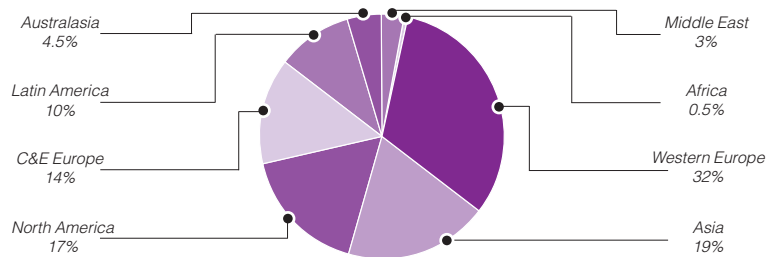
Thank you to the following institutions for taking part in our Status survey:

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.

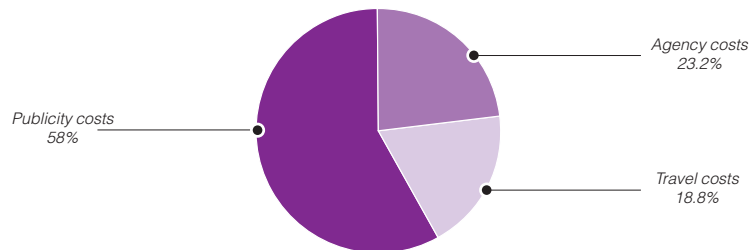
Status Survey statistics are based on figures supplied by a selection of individual schools. Not all survey respondents answered every question in the survey. Figures are, in some cases, rounded up or down to the nearest whole. All information is treated with the strictest confidence.

**Next month:
New Zealand**

Marketing budget by region



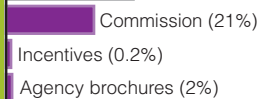
Marketing budget by sector



Marketing spend by category

Total spend by sector in %

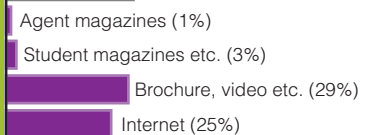
Agency



Travel



Publicity

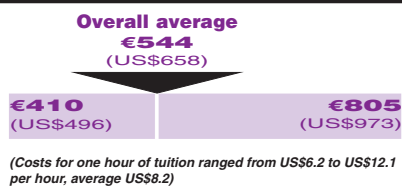


Marketing spend as % of school's gross income

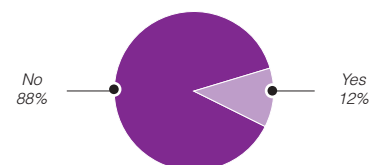


Average cost of tuition

For 80 hours of tuition



% of institutions offering/selling travel insurance



Annual student intake in Italy by world region of origin

