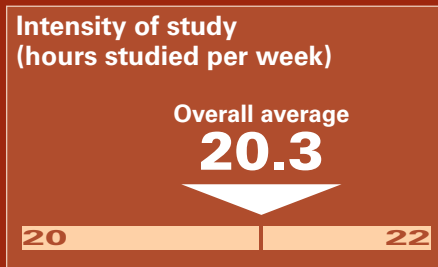
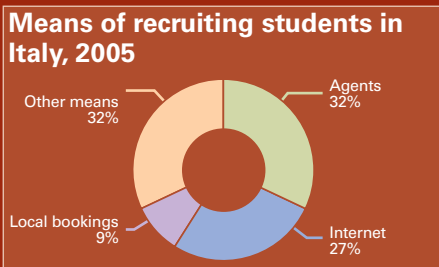


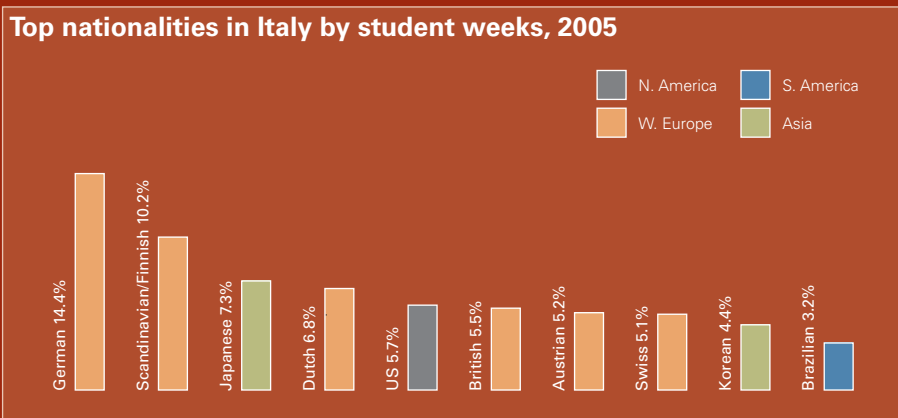
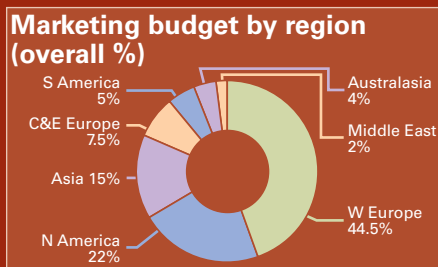
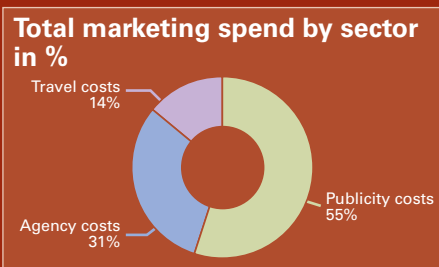
Status: Italy 2005

The Status survey gathers specific market data about all of the main language teaching markets in the world. Through this initiative, it is now possible to compare world market statistics, a summary of which will be published in the March 2007 issue.

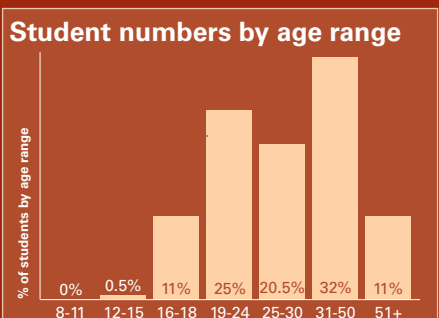
If you would like to see the complete breakdown of data, please visit www.hothousemedia.com/statuszone/lmstatus/lm05.htm where this information is available. Thanks to all the schools that contribute valuable data - confidentially - to help us produce this market information.



- ### Key points
- No. of participating organisations in the Italy survey: **12**
 - Total no. of students at the organisations in 2005: **6,542 students**
 - Total no. of student weeks in 2005, estimated: **18,318 weeks**
 - Overall average length of stay: **2.8 weeks**
 - Average cost of a one-month course, excluding accommodation: **€584 (US\$750)**
 - Average cost of residential accommodation per week: **€182 (US\$233)**
 - Average cost of host family accommodation per week: **€222 (US\$285)**
 - Average commission paid on a language course: **21.5 per cent** (from 15 to 30)
 - Three** institutions paid commission on accommodation (from 5 to 17 per cent)



- ### Observations
- There have been some changes in the nationality mix this year, even though only three fewer schools took part in our survey this year than last year and the overall volume was similar, given the size of the survey. Japanese and US students remain important but Germans are now in number-one position, overtaking Swiss, while Scandinavian + Finnish students are in second position, coming from nowhere as they were not listed for 2004.
 - The main change is the average length of stay, 7.2 weeks last year and just 2.8 weeks this year.
 - Agent usage to recruit students dropped slightly from 41% last year to 32% (see LTM, November 2005, page 45), but it was "other means" that made up the shortfall, as enrolments via the Internet and local bookings held steady.
 - Prices for tuition were comparable year on year.

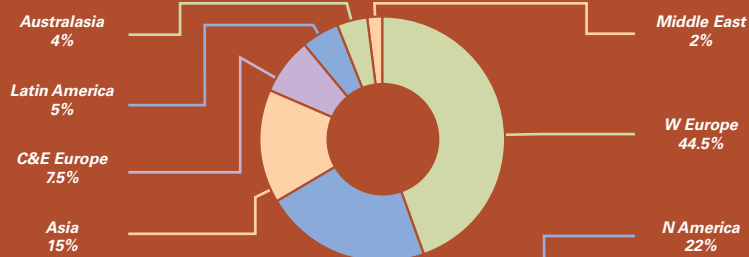


Thank you to the following institutions for taking part in our Status survey: Accademia del Giglio, Florence; Centro Studi Idea Verona, Verona; Dilit - International House, Rome; Eurolinks, Amelia; Istituto Il David, Florence; Koine Center, various; Laboratorio Linguistico, Milazzo (Sicily); Omnilingua, San Remo; Romanica - Accademia Italiana di Lingua e Cultura, Modena; Il Sillabo, San Giovanni Viro; Solemar, Aspra/Palermo and Cefalu (Sicily); Sorrento Lingue, Centro Linguistico Internazionale, Sorrento.

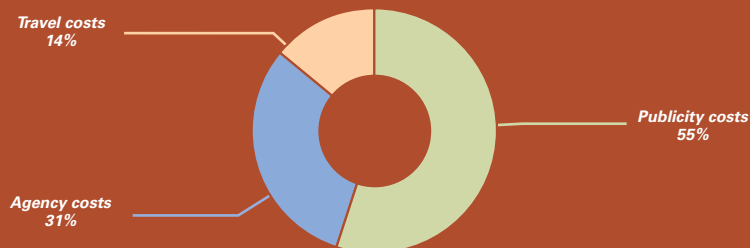
Status Survey statistics are based on figures supplied by a selection of individual schools. Not all survey respondents answered every question in the survey. Figures are, in some cases, rounded up or down to the nearest whole. All information is treated with the strictest confidence.

Currency conversion at 02/09/06:
1US\$ = €0.779

Marketing budget by region



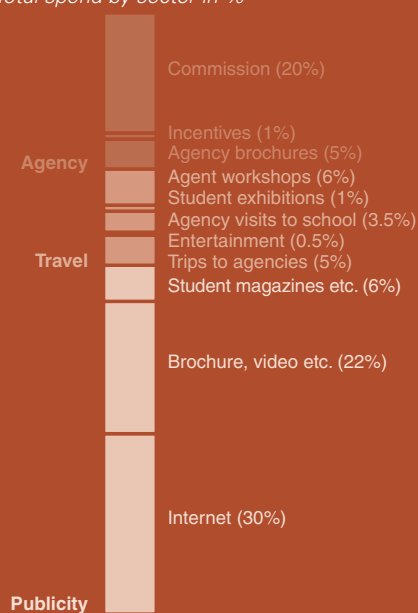
Marketing budget by sector



Marketing spend by category

based on sample of schools

Total spend by sector in %



Marketing spend as % of school's gross income

Overall average

21.6%

5% ————— 40%

Average cost of tuition

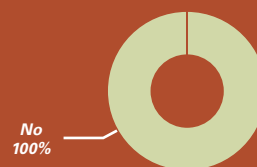
For 80 hours of tuition

Overall average
€584 (US\$750)

€400 (US\$513) ————— €800 (US\$1,027)

(Costs for one hour of tuition ranged from US\$6.4 to US\$12.8 per hour, averaging US\$9.3)

% of institutions offering/selling travel insurance



Annual student intake in Italy by world region of origin

