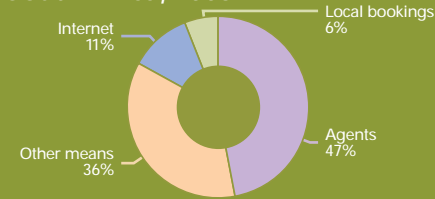


Status: South Africa 2005

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.

Means of recruiting students in South Africa, 2005



Intensity of study (hours studied per week)

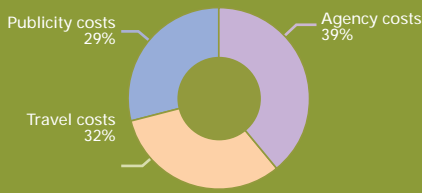
Overall average
21.5

20 | 28

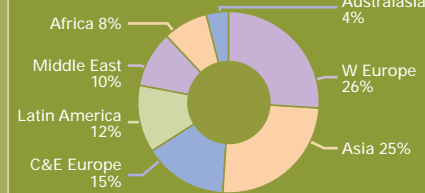
Key points

- Number of participating organisations in the South Africa survey: **8**
- Total number of students at the organisations in 2005: **3,182**
- Total number of student weeks in 2005, estimated: **47,457**
- Overall average length of stay in weeks: **12.4**
- Average cost of a one-month course, excluding accom.: 5,011 rand (US\$698)
- Average cost of residential accommodation per week: 645 rand (US\$90)
- Average cost of host family accommodation per week: 1,035 rand (US\$144)
- Average commission paid on a language course: **20 per cent** (0 or 20 per cent offered)
- **One** institution paid commission on accommodation (of 20 per cent)

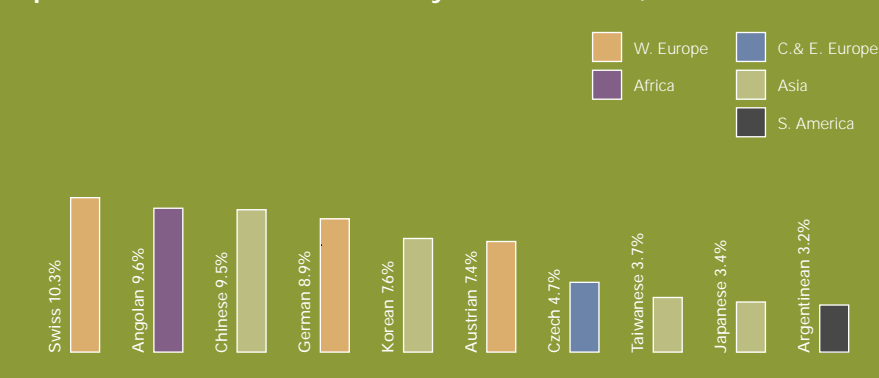
Total marketing spend by sector in %



Marketing budget by region (overall %)



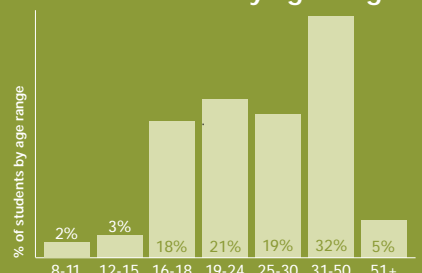
Top nationalities in South Africa by student weeks, 2005



Observations

- The sample size of schools in our South Africa survey was the same as last year (see LTM, Feb 2006, page 48) however actual student numbers were down although average length of stay was up, meaning a higher overall volume of student weeks.
- Swiss students overtook German students to be in number-one position this year, while Angolan students in second position were far more significant than last year. Chinese students were also more numerous, in third place, while Germans were in fourth.
- The proportion of students in the 16-to-18 year old category was over 10% higher than in our previous survey, although it should be noted that different schools were in our survey. Perhaps as a consequence, typical hours studied per week was down from 29 to 21.5.

Student numbers by age range



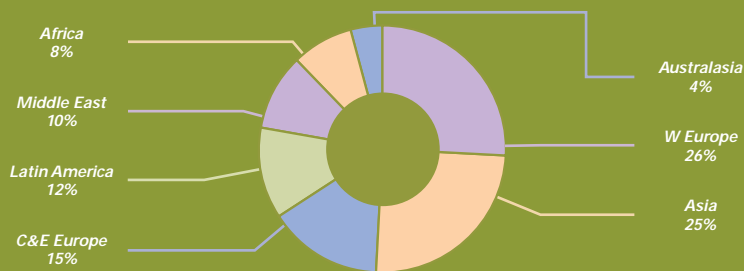
Thank you to the following institutions for taking part in our Status survey:

Eurocentres, Cape Town; Inlingua Language Training Centre, Cape Town; Interlink School of Languages, Cape Town; The International English School, Somerset West; LAL, Cape Town and Durban; Shane Global Language Center, Cape Town; South African School of English, Cape Town; Wits Language School, Johannesburg.

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.

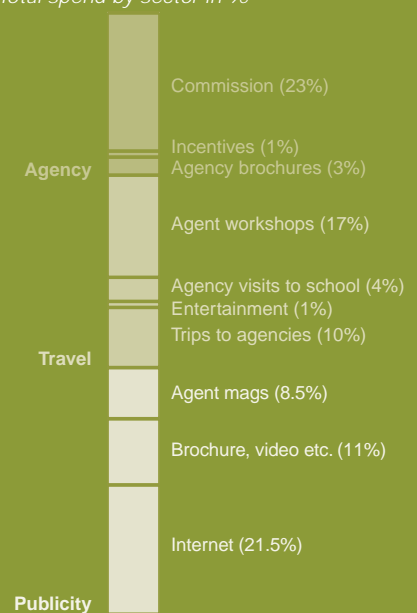
**Next month:
Global analysis**

Marketing budget by region

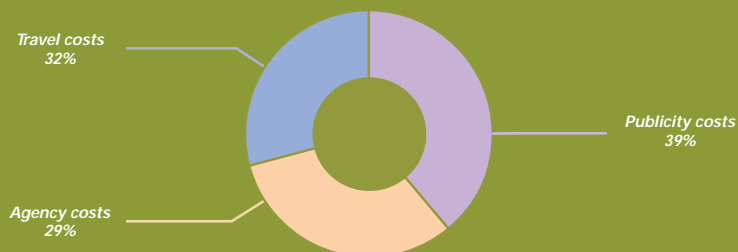


Marketing spend by category

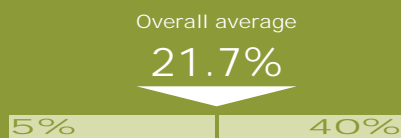
based on sample of schools
Total spend by sector in %



Marketing budget by sector



Marketing spend as % of school's gross income



Average cost of tuition

For 80 hours of tuition

Overall average
e (US\$??)

ZAR 3,300 (US\$460) **ZAR 6,395** (US\$891)

(Costs for one hour of tuition ranged from US\$5.75 to US\$11 per hour, averaging US\$8.40)

% of institutions offering/selling travel insurance



Annual student intake in Soth Africa by world region of origin

