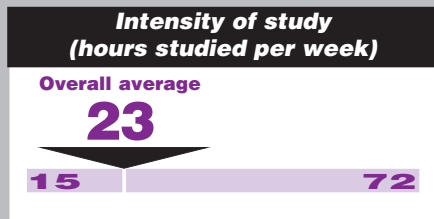
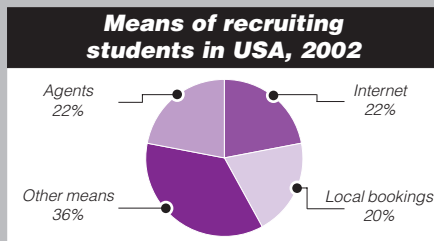


Status: USA 2002

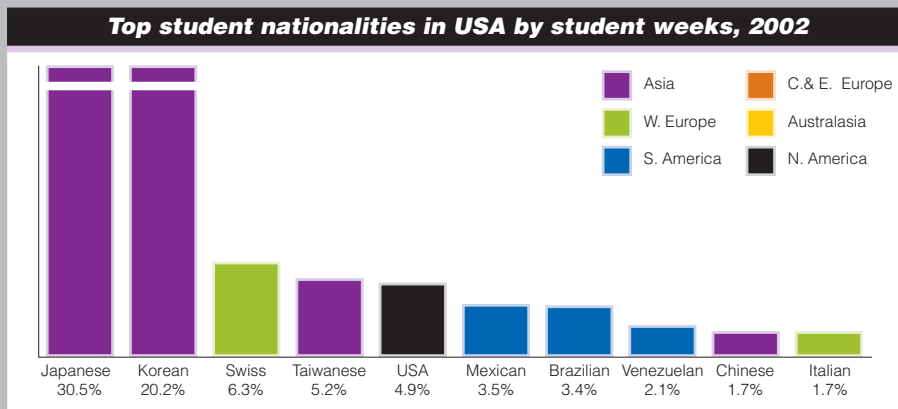
The data provided on the Status pages represents the world's only truly comparable statistics for the language travel industry. This information is only available to agents and education institutions that plan to participate in our Status surveys, which are carried out on a regular basis.



Key points

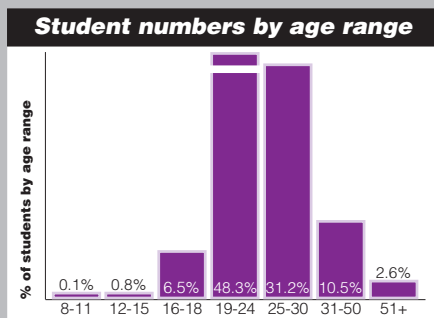
- No. of participating organisations in the USA survey: **22**
- Total no. of students at in 2002: **8,248 students**
- Total no. of student weeks in 2002, estimated: **123,720 weeks**
- Overall average length of stay: **15 weeks**
- Average cost of a one-month course, excluding accommodation: **US\$798**
- Average cost of residential accommodation per week: **US\$188**
- Average cost of host family accommodation per week: **US\$200**
- Average commission paid on a language course: **13.6 per cent** (from 0 to 25)
- **Two** institutions paid commission on accommodation (of 10 or 15 per cent)

*For currency conversion rate, see page 4.



Observations

- Japanese and Korean students continue to dominate the nationality spread of students in the US, with similar market share to our 2001 survey.
- Swiss students were in number-three position this year, although their market share was only 1% higher than last year, while Brazilians dropped from third-largest nationality to number seven this year, representing just 3.4% of students, from 7.3% in 2001.
- Average prices for four weeks of English language tuition dropped slightly on the price in last year's survey by almost US\$150, to an average of US\$798.
- The percentage of students that were recruited by agents decreased from an overall 33 per cent in 2001 to 22 per cent this year. The USA remains one of the markets least reliant on agencies for bookings, according to our Status surveys.



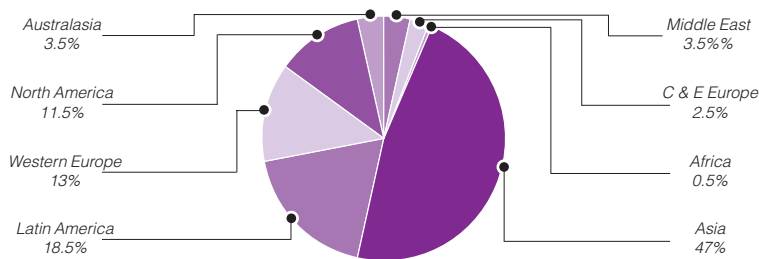
Thank you to the following institutions for taking part in our Status survey:

AF International School of Languages, Los Angeles, CA; American English Institute, University of Oregon, Eugene, OR; Beverley Hills International School of Languages, Los Angeles, CA; Bridge-Linguathec, Denver, CO; California State University, American Culture and Language Program, Los Angeles, CA; Center for English Language Learning, Maryville, TN; College of Marin, Intensive English Program, Novato, CA; Conversa Language Center, Cincinnati, OH; Diplomatic language Services, Inc. English Language Institute, Arlington, VA; English Language Institute, Corvallis, OR; English Language Institute of Virginia Tech, Blacksburg, VA; English Language Institute, University of Tennessee, Knoxville, TN; Fulton-Montgomery Community College State University of New York, Johnstown, NY; Intensive English Institute, Urbana, IL; The New England School of English, Boston, MA; North Dakota State University, Fargo, ND; St. Mary's College of California, Moraga, CA; San Francisco Institute of English, San Francisco, CA; Seattle Language Academy, Seattle, WA; Shane Global Village, Honolulu, HI; South Seattle Community College, Seattle, WA; University of California, San Diego, CA.

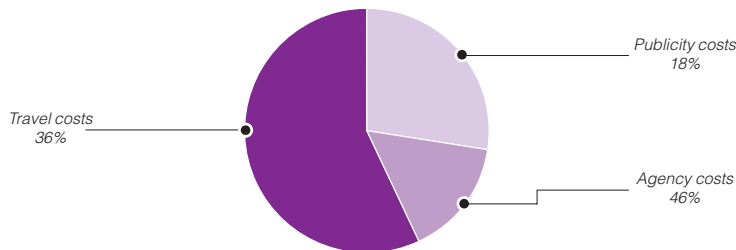
Status Survey statistics are based on figures supplied by a selection of individual schools. Not all survey respondents answered every question in the survey. Figures are, in some cases, rounded up or down to the nearest whole. All information is treated with the strictest confidence.

Next month: Germany

Marketing budget by region



Marketing budget by sector



Marketing spend by category

Total spend by sector in %

Agency

- Commission (11.5%)
- Incentives (2%)
- Agency brochures (2%)

Travel

- Agent workshops (8%)
- Student exhibitions (9%)
- Agency visits to school (1%)
- Entertainment (2%)
- Trips to agencies (7.5%)

Publicity

- Agent magazines (4%)
- Student magazines etc. (16%)
- Brochure, video etc. (27.5%)
- Internet (9.5%)

Marketing spend as % of school's gross income

Overall average
9.9%



Average cost of tuition

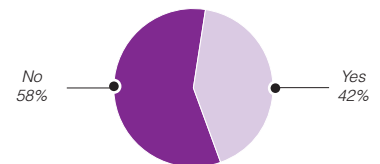
For 80 hours of tuition

Overall average
US\$798



(Costs for one hour of tuition ranged from US\$4 to US\$16.5 per hour, average US\$9.9)

% of institutions offering/selling travel insurance



Annual student intake in USA by world region of origin

