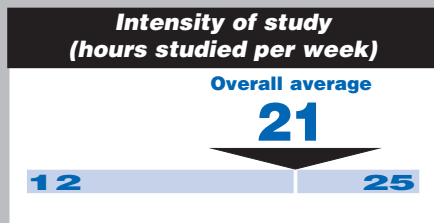
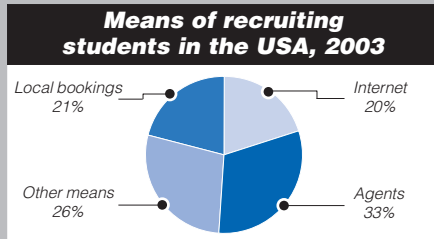


Status: USA 2003

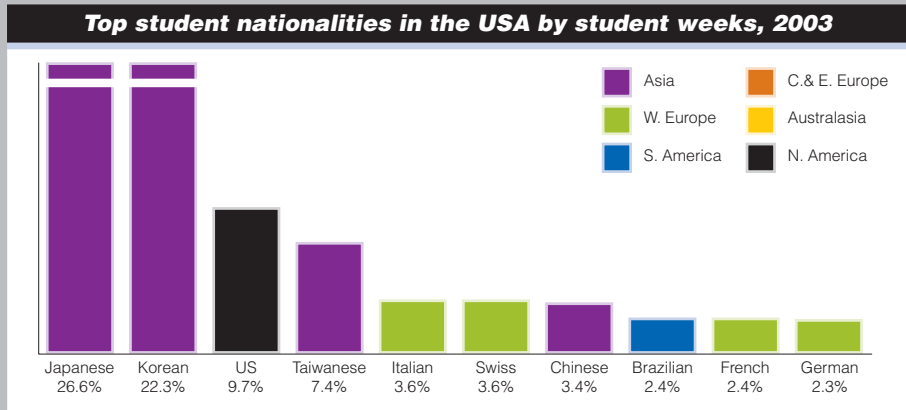
The data provided on the Status pages represents the world's only truly comparable statistics for the language travel industry. This information is only available to agents and education institutions that plan to participate in our Status surveys, which are carried out on a regular basis.



Key points

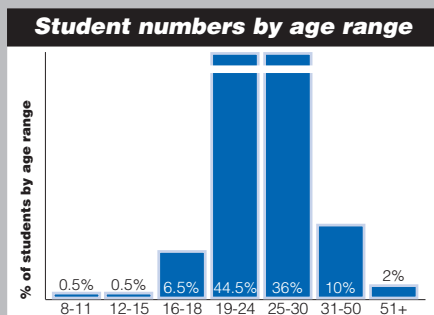
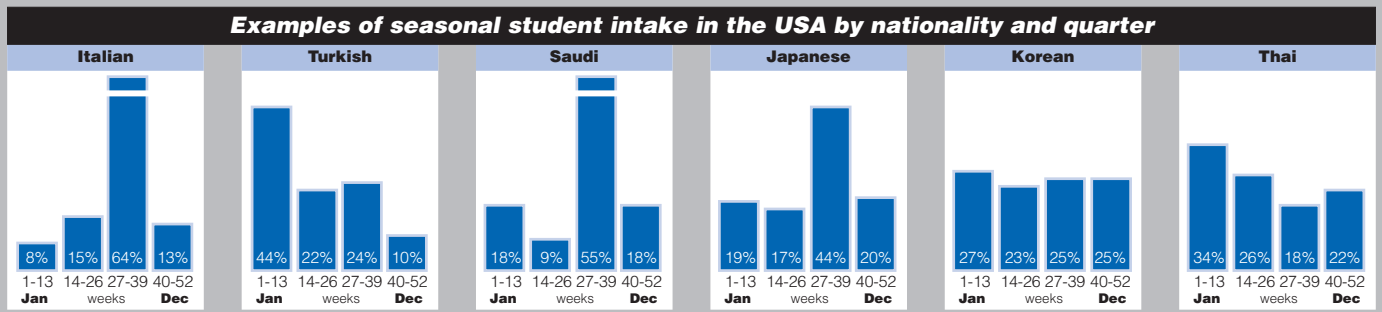
- No. of participating organisations in the US survey: **19**
- Total no. of students at 18 of the organisations in 2003: **18,282**
- Total no. of student weeks in 2003, estimated: **212,071**
- Overall average length of stay in weeks: **11.6**
- Average cost of a one-month course, excluding accommodation: **US\$864**
- Average cost of residential accommodation per week: **US\$201**
- Average cost of host family accommodation per week: **US\$203**
- Average commission paid on a language course: **15 per cent** (from 0 to 25)
- **One** institution paid commission on accommodation

*For currency conversion rate, see page 6.



Observations

- Japanese and Koreans remain the two most significant nationalities studying in the USA, by quite a sizeable margin. A high number of local bookings from US-based students also figured in this survey. Italians were more prominent this year, in fifth position, up from tenth position last year (see LTM, December 2003, page 40).
- The average length of stay has decreased slightly, down to 11.8 weeks from 15 weeks last year. However, typical prices for tuition and accommodation have not changed year on year.
- Agent usage seems to have increased, with agents accounting for one-third of all bookings, which is an increase on the 22% recorded last year. This is still low when compared with some countries such as Australia, where nearly two-thirds of bookings came via agents (see LTM, June 2004, page 44).

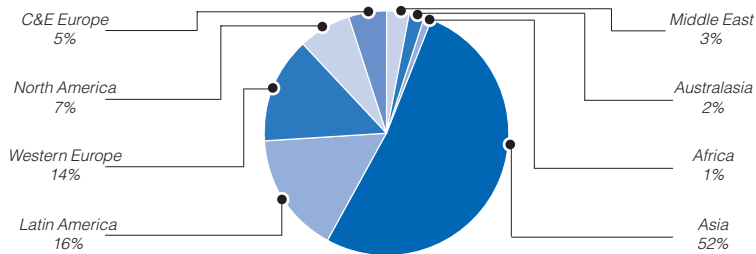


Thank you to the following institutions for taking part in our Status survey: California State University, Los Angeles, CA; American Language Communication Center, New York, NY; Center for English Language Learning, Maryville College, Maryville, TN; College of Marin, Novato, CA; Embassy CES, New York, NY; English Language Institute, University of Pittsburgh, Pittsburgh, KS; Hawaii Community College, Hilo, HI; NESE, Cambridge, MA; North Dakota State University, Fargo, ND; The Olin Center for International Study, Boston, MA; Rennert Bilingual, New York, NY; St Giles International, San Francisco, CA; Snow College, Ephraim, UT; Talk International, Fort Lauderdale, FL; The Language Academy, Fort Lauderdale, FL; Troy State University, Troy, KS; UC Extension Santa Cruz, Santa Cruz, CA; University of Oregon AEI, Eugene, OR; University of South California Language Academy, Los Angeles, CA.

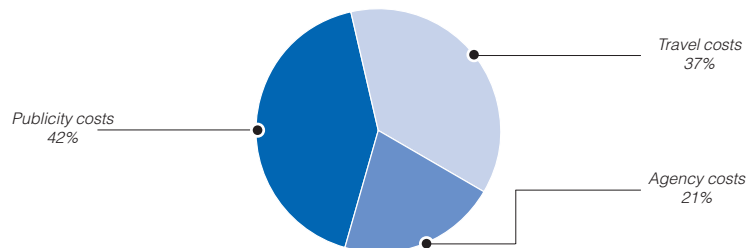
Status Survey statistics are based on figures supplied by a selection of individual schools. Not all survey respondents answered every question in the survey. Figures are, in some cases, rounded up or down to the nearest whole. All information is treated with the strictest confidence.

Next month: Italy

Marketing budget by region



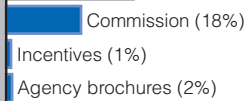
Marketing budget by sector



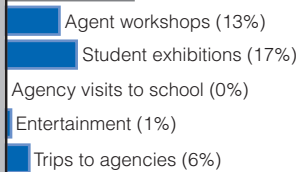
Marketing spend by category

Total spend by sector in %

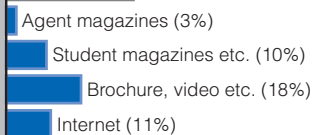
Agency



Travel



Publicity



Marketing spend as % of school's gross income

Overall average
8.7%



Average cost of tuition

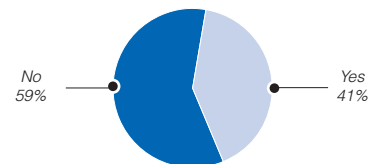
For 80 hours of tuition

Overall average
US\$864



(Costs for one hour of tuition ranged from US\$6.25 to US\$16.5 per hour, average US\$10.8)

% of institutions offering/selling travel insurance



Annual student intake in the USA by world region of origin

