

Updated Snapshot: France (FRA)

Statement

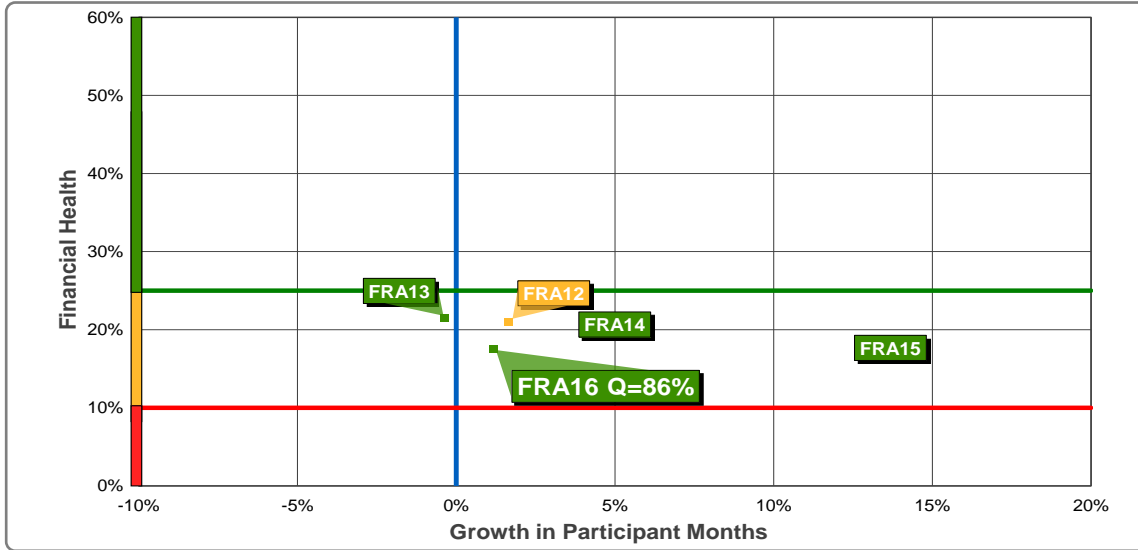


Partner Organizations 2016

ARG	AUS	AUT	BFL	BFR	BIH	BOL	BRA	CAN	CHI
CHN	COL	CRC	CRO	CZE	DEN	DOM	ECU	EGY	ESP
FIN	FRA	GER	GHA	GUA	HKG	HON	HUN	INA	IND
ISL	ITA	JPN	KEN	KOR	LAT	MAS	MEX	NED	NOR
NZL	PAN	PAR	PER	PHI	POL	POR	RSA	RUS	SLO
SRB	SUI	SVK	SWE	THA	TUN	TUR	USA	VEN	

■ Sending to: 43
 ■ Hosting from: 49

3D Health Indicators 2012-2016



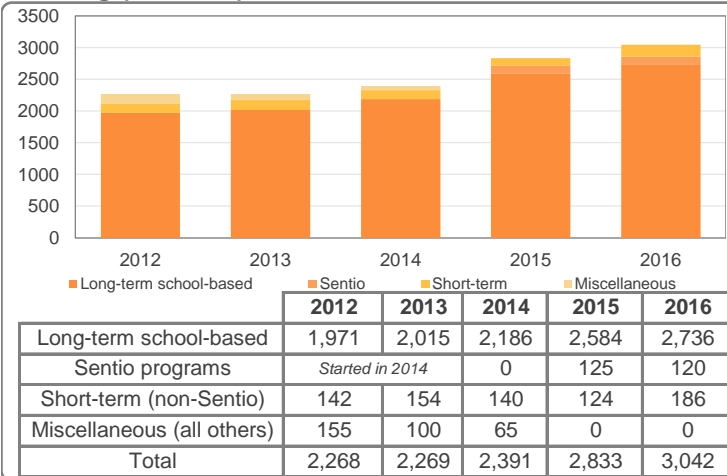
KPIs

Yr	Growth	Finances	Quality
16	+1%	18%	86%
15	+12%	18%	86%
14	+4%	21%	86%
13	-0%	22%	86%
12	+2%	21%	83%

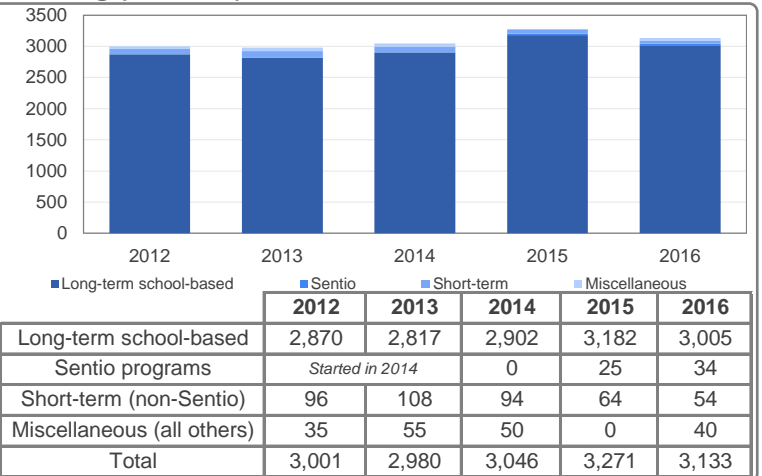
NPPR Status

Yr	Phase
16	No phase
15	No phase
14	No phase
13	No phase
12	No phase

Sending (Pax Mos) 2012-2016



Hosting (Pax Mos) 2012-2016



Quality Assessment 2014-2016

Quality	Hosting CSE				Sending CSE				PSE	Overall Eval Score	Bonus/ Penalty	Final Quality Score
	host fam	school	other stu	other nat fam	stu	nat fams	other host fams	other schools				
2016 Network Total	78%	85%	94%	92%	94%	92%	78%	85%	92%	88%	-1%	87%
2016 (CSE16, PSE16-15)	74%	77%	94%	96%	96%	92%	78%	84%	95%	87%	-1%	86%
2015 (CSE15, PSE15-14)	70%	82%	95%	95%	91%	93%	77%	89%	95%	87%	-1%	86%
2014 (CSE14, PSE14-13)	73%	94%	89%	93%	91%	89%	76%	91%	91%	87%	-1%	86%

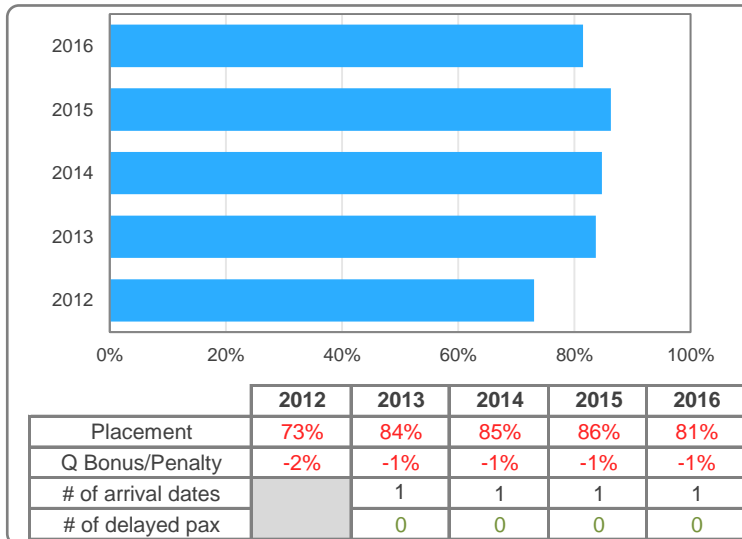
Key Financial Numbers in Effective USD 2013-2015

Finances	Annual Turnover	% of total	Total Expenses	% of total	Net Results	% of unr. net assets	Current Assets	% of expenses	Unr. Net Assets	% of expenses
2015 Network Total	183,453,070	100%	178,003,152	100%	5,449,918	8%	116,051,027	65%	70,545,137	40%
2015	4,410,623	2%	4,350,923	2%	59,700	8%	1,413,107	32%	763,762	18%
2014	4,758,926	3%	4,765,158	3%	-6,231	***	1,504,046	32%	842,063	18%
2013	4,146,353	2%	4,106,142	2%	40,211	5%	1,759,243	43%	848,634	21%

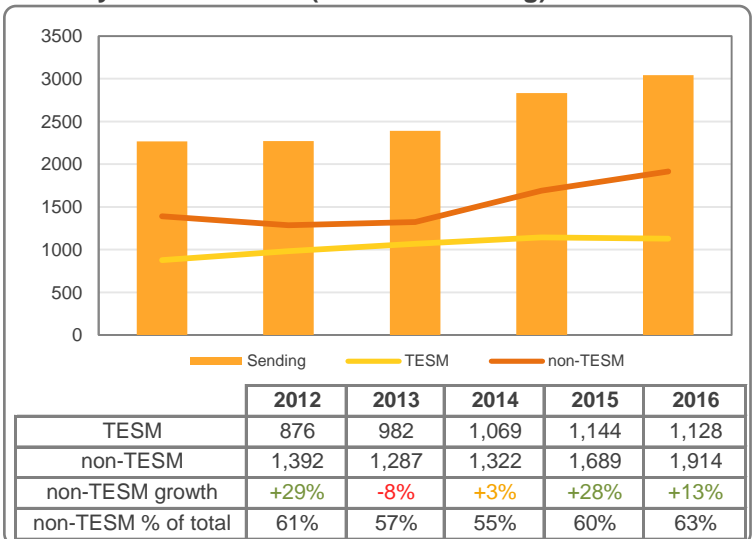
***Unrestricted Net Assets is meaningless because these are negative

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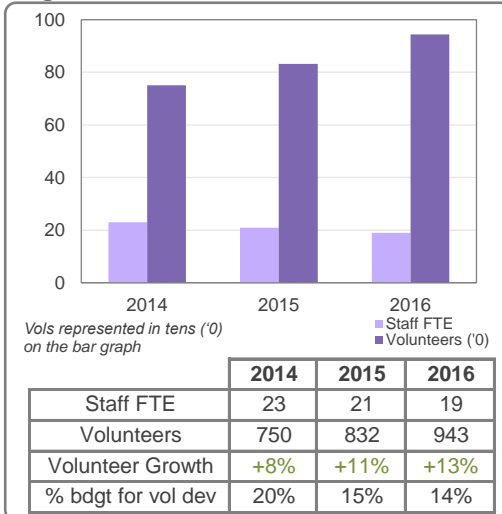
On-time Placement Performance



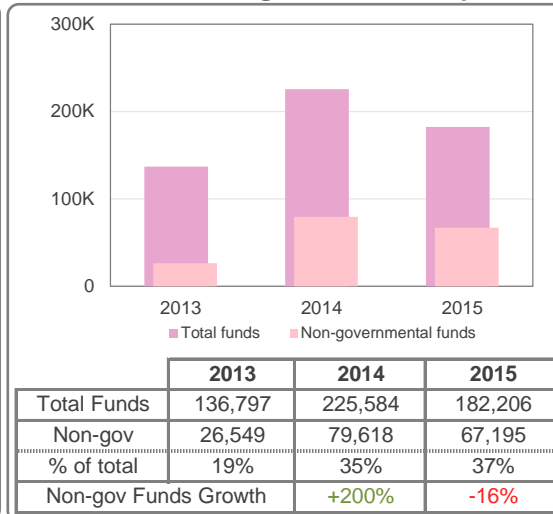
Country Diversification (Pax Mos Sending)



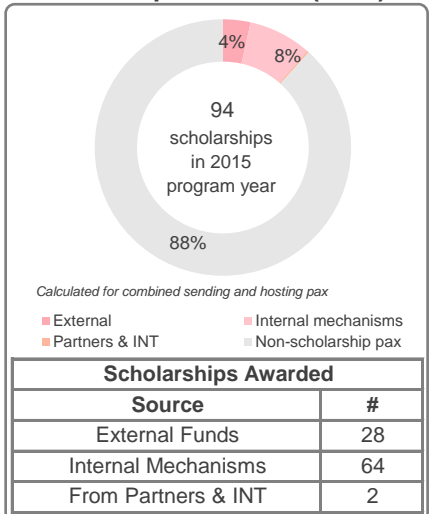
Organizational Structure



External Fundraising for Scholarships



Scholarships Awarded (2015)



Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	6	0	0
% of Total	0.6%	0.0%	0.0%

W = What Every AFSer Should Know About Intercultural Learning.
1 - 3 = LP levels 1, 2, and 3; QT = Qualified Trainers

Orientations								
	PD	A	PA	MS	PR	EOS	PoR	Other
Pax	●	●	●	●	●	●	●	
Host Fams	●	●	●	●				
Nat Fams	●				●			
Sch/CPOs								
Attendance:	0% (blank)	1-25% ●	26-50% ●	51-75% ●	76-100% ●			

PD = pre-departure, A = arrival, PA = post-arrival, MS = mid-stay, PR = pre-return, EOS = end-of-stay, PoR = post-return, Oth = other

AFS Market Share and Competitor Landscape

Estimated Market Share (Latest Year Available)		
Outbound	Inbound non-fee paying	Inbound fee & non-fee
18.4%	28.7%	N/A

Non-fee paying = not paying tuition and hosted in volunteer host families;
Fee paying = paying tuition and often hosted in paid host families

Competitors	
Sending (sc programs)	Hosting (sc programs)
Rotary, YFU, PIE	CEI, YFU, PIE
Sending (18+ programs)	Hosting (18+ programs)
Solidarité Jeunesse, Concordia, France Volontaire	Concordia, Solidarité Jeunesse

Educational System and Accreditation

Educational Designation & Credit Agreement	
Designated as an Educational Entity	
(Full) Credit Agreement	
(Partial) Credit Agreement	

Ties to the World around AFS

International Exposure and Collaboration with Others	
Joint project/new affiliation	
External forum or event	

Market Environment

Market Trends and Forecasts
More and more students travel and the Ministry of Education is slowly starting to support high school level international exchanges, especially through AFS, which is the only organization recognized and certified by the MoE. AFS is the largest sender and the largest (or 2nd largest) hoster of school programs with volunteer hosting. Therefore, and also because of the small size of the market in relation to the general population, our marketing efforts are more focused on explaining the concept of studying abroad rather than on competition with other actors.