ANNUAL MARKETING STATISTICS REPORT
2011 ANNUAL RETURN RESULTS

ENGLISH UK

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English UK Ltd
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1. 2011 ANNUAL TOTALS AND THE TOP FIVE MARKETS

The collated annual statistics results show that **in 2011 students spent 2,148,146 student weeks in total on ELT courses at our 368 private sector member centres**. Of these total student weeks, 78.94% were adult, and the remaining 21.06% junior. Based on data returned by 330 centres, adult students stayed 5.72 weeks on average and juniors 3.13 weeks. This total private sector member student week figure represents approximately 441,098 individual students (296,429 adult plus 144,669 junior students).

During 2011 the top five country markets for our private sector members were: Italy, Spain, Rest of Middle East, South Korea and Rest of Europe.

Table 1 below shows full details of the country/regional breakdowns. Please note state sector members were not asked to supply country breakdowns.

Table 1: 2011 annual return statistics (all 368 private sector members)

Ranking	Country/Region	No. of student weeks* in 2011	Percentage (%) of total student weeks in 2011
1st	Italy	243,047	11.31
2nd	Spain	225,790	10.51
3rd	Rest of Middle East	131,430	6.12
4th	S Korea	125,966	5.86
5th	Rest of Europe	118,922	5.54
6th	Saudi Arabia	118,481	5.52
7th	Brazil	117,068	5.45
8th	Turkey	117,034	5.45
9th	France	107,323	5.00
10th	Russia	97,597	4.54
11th	Colombia	95,218	4.43
12th	China/Hong Kong	85,383	3.97
13th	Switzerland	82,229	3.83
14th	Japan	81,695	3.80
15th	Germany	76,885	3.58
16th	Rest of World	73,004	3.40
17th	Thailand	55,716	2.59
18th	Taiwan	28,139	1.31
19th	Rest of Central America	25,577	1.19
20th	Rest of Far East	22,996	1.07
21st	Mexico	21,129	0.98
22nd	Venezuela	19,858	0.92
23rd	Austria	18,305	0.85
24th	Poland	17,179	0.80
25th	Czech Republic	16,995	0.79
26th	Sweden	12,678	0.59
27th	Argentina	12,502	0.58

**A student week is defined as one student taking 10 or more contact hours in one week*

For 2011, our 88 state sector members were asked to declare an annual ELT student week figure (or provide an ELT teacher taught hour figure for conversion). The aggregated student week figure for these 88 centres was 386,434. As the number of state sector members has decreased by 5.38% from the 93 in the last report, the student weeks spent on ELT courses have also decreased by 7.43% on the 416,708 in 2010.

Therefore the estimated **total number of ELT student weeks spent at all our 456 members in 2011 was 2,534,580**. This represents **approximately 520,219 individual students**. This compares with 455 members in 2010 declaring 2,560,876 student weeks (representing approximately 454,340 individual students). This is a **percentage decrease of 1.03% in terms of absolute student weeks but a 14.49% increase in the estimated number of individual students**. This is due to the change in length of adult student stay in the last two years.

2. COMPARISON BETWEEN 2011 AND 2010 ANNUAL STATISTICS

2.1. Observations on the data

Since November 2011 (when the 2010 annual marketing statistics report was produced) we have seen 15 new members join English UK. During the same period, 14 members have left (9 ceased trading, 5 withdrew from accreditation).

There has therefore been an overall increase of 1 member centre in the past year. Centres in membership account for just over 80% of the accredited sector, a 4% decrease on the previous year.

Note: To enable meaningful comparisons, the data from the 353 private sector centres in membership for both years has been extracted. It is this sub-set that is referred to in the analysis in section 2.2.

2.2 Total student weeks and total student numbers

The 353 private sector centres which were in membership in both 2010 and 2011 reported 2,118,897 SW in 2011, as against 2,112,530 in 2010, so an increase of 0.3%.

The number of individual students this represents was up from 376,125 in 2010 to 433,550 in 2011.

The other marked feature of the returns from these 353 centres is that the adult: junior ratio was 79% adult to 21% junior, a further increase in the proportion of junior students; over roughly the last 10 years it has changed from 87% adults to 13% juniors. In part this reflects demand (English is now taught at a younger age in schools in a lot of countries, leading to younger students wanting a UK summer school course to help with their home country school progress in learning English), and in part it reflects another result of the visa barriers for older students wanting to come on a Tier 4 General Student Visa.

Table 2: Comparison of 2011 and 2010 total student weeks* (for the 353 private sector centres in membership in both years)

Adult/Junior	2011	2010	Comparisons	
	Total no. of student weeks	Total no. of student weeks	Change in no. of student weeks	% increase or decrease in no. of student weeks in 2010
Adult Student Weeks	1,680,962	1,755,632	-74,670	-4.25
Junior Student Weeks	437,935	356,898	81,037	22.71
TOTAL	**2,118,897**	**2,112,530**	6,367	0.30

**A student week is defined as one student taking 10 or more contact hours in one week*

For the 353 private sector centres in membership in both years the total number of student weeks was higher in 2011 than in 2010 (2,118,897 compared with 2,112,530). See figures on table 2 for details. This is an overall increase of 0.3%. This is a much lower rate of increase than seen in the previous 2 years (7.3% and 4.1% respectively) but it was the seventh year in a row that the UK experienced sustained growth – a phenomenon not seen since the late 1980s.

The increase was seen in the number of junior student weeks in which case the rate of increase was higher than in the preceding 12 months. The total number of junior student weeks rose substantially by 22.71% continuing a trend seen since 2005. There was however a decrease in the number of adult student weeks of -4.25%. As a result, for the second year in a line, the adult/junior balance shifted towards junior provision. The junior proportion, increased compared to 2010: in 2011 juniors accounted for 21.06% of the total student weeks. For the same schools in 2010, they represented 16.82%.

For junior students there was also a slight increase in the average length of time stayed. The average junior duration of stay was 2.99 weeks in 2010 and 3.13 weeks in 2011; however for adult students there was a slight decrease in the average length of time stayed: it was 5.72 in 2011 and 6.91 weeks in 2010.

Although the number of adult student weeks and average stay decreased, this resulted in the number of individual students increasing: in 2011 the estimated total number of students for these centres was 433,550 compared with 376,125 in 2010.

2.3 Relative changes in geographical market share (i.e. % share of total student weeks)

With a few exceptions, Rest of Middle East, Turkey, Russia and Colombia, the 2011 market rankings for the 353 centres in membership for both years (see table 3) is similar to the rankings seen for all the 353 private centres in membership in 2010 (see table 1).

For the majority of the 27 countries/geographical source areas, their market share ranking has changed very little over the two years, with 5 seeing no change in position and 18 moving up or down by one or two places. For most of the remainder there is a continuation of the trends seen in the previous 12-month period.

The strength of Italy and Spain is a consequence of the Eurozone sovereign debt crisis: young adults in Mediterranean countries do not expect to get jobs (either at all or reasonably paid graduate level jobs) in the next 5-10 years, and so are looking to move abroad for work. Key to an international career is command of English as the international language, so they are first looking to improve their English, and their parents and families are using their savings to help them do this.

Table 3: Comparison of market share 2011 and 2010 (for the 353 private sector centres in membership in both years) – listed in order of 2011 ranking.

Country/Region	2011		2010		Comparisons	
	Market share (% of total student weeks)	Ranking	Market share (% of total student weeks)	Ranking	Change in market share	Change in ranking
Italy	11.04	1	9.16	2	1.88	1
Spain	10.55	2	9.94	1	0.60	-1
Rest of Middle East	6.18	3	5.89	7	0.29	4
S Korea	5.92	4	6.89	3	-0.97	-1
Saudi Arabia	5.56	5	6.28	4	-0.72	-1
Rest of Europe	5.52	6	6.00	6	-0.47	0
Brazil	5.51	7	5.39	9	0.11	2
Turkey	5.47	8	6.27	5	-0.80	-3
France	5.02	9	4.66	11	0.36	2
Russia	4.55	10	3.57	13	0.98	3
Colombia	4.47	11	5.71	8	-1.23	-3
China/Hong Kong	4.00	12	4.80	10	-0.81	-2
Switzerland	3.87	13	3.52	14	0.35	1
Japan	3.84	14	4.26	12	-0.41	-2
Germany	3.61	15	3.23	15	0.39	0
Rest of World	3.22	16	2.94	17	0.29	1
Thailand	2.61	17	2.94	16	-0.33	-1
Taiwan	1.32	18	1.20	19	0.13	1
Rest of Central America	1.15	19	1.09	20	0.06	1
Rest of Far East	1.01	20	1.22	18	-0.21	-2
Mexico	0.99	21	0.86	22	0.13	1
Venezuela	0.93	22	0.90	21	0.04	-1
Austria	0.86	23	0.78	24	0.08	1
Poland	0.80	24	0.81	23	0.00	-1
Czech Republic	0.80	25	0.76	25	0.04	0
Sweden	0.59	26	0.54	26	0.05	0
Argentina	0.59	27	0.39	27	0.19	0

**A student week is defined as one student taking 10 or more contact hours in one week.*

2.4 Changes in absolute student week nos. in specific markets between 2011 and 2010

The changes in actual student week numbers for individual markets over the two years largely reflect the patterns highlighted in table 3 and are shown in detail in table 4 below.

Table 4: Comparison of 2011 & 2010 student weeks* in individual markets (for the 353 private sector centres in membership in both years) - listed in order of 2011 student week figures

Country/Region	2011	2010	Comparisons	
	No. of student weeks*	No. of student weeks*	Change in no. of student weeks	% increase or decrease in no. of student weeks in 2010
Italy	234,012	193,496	40,516	20.94
Spain	223,507	210,069	13,438	6.40
Rest of Middle East	130,909	124,408	6,501	5.23
S Korea	125,415	145,544	-20,129	-13.83
Saudi Arabia	117,763	132,692	-14,929	-11.25
Rest of Europe	117,043	126,690	-9,647	-7.61
Brazil	116,682	113,923	2,759	2.42
Turkey	115,812	132,415	-16,604	-12.54
France	106,453	98,472	7,982	8.11
Russia	96,391	75,436	20,955	27.78
Colombia	94,800	120,552	-25,752	-21.36
China/Hong Kong	84,675	101,431	-16,756	-16.52
Switzerland	81,991	74,311	7,680	10.34
Japan	81,466	89,981	-8,515	-9.46
Germany	76,546	68,143	8,402	12.33
Rest of World	68,277	62,045	6,232	10.04
Thailand	55,349	62,202	-6,854	-11.02
Taiwan	28,051	25,280	2,771	10.96
Rest of Central America	24,441	23,094	1,348	5.83
Rest of Far East	21,416	25,854	-4,438	-17.17
Mexico	20,990	18,222	2,768	15.19
Venezuela	19,783	18,957	825	4.35
Austria	18,205	16,562	1,643	9.92
Poland	17,038	17,018	19	0.11
Czech Republic	16,905	15,968	936	5.86
Sweden	12,571	11,444	1,126	9.84
Argentina	12,407	8,317	4,090	49.17

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