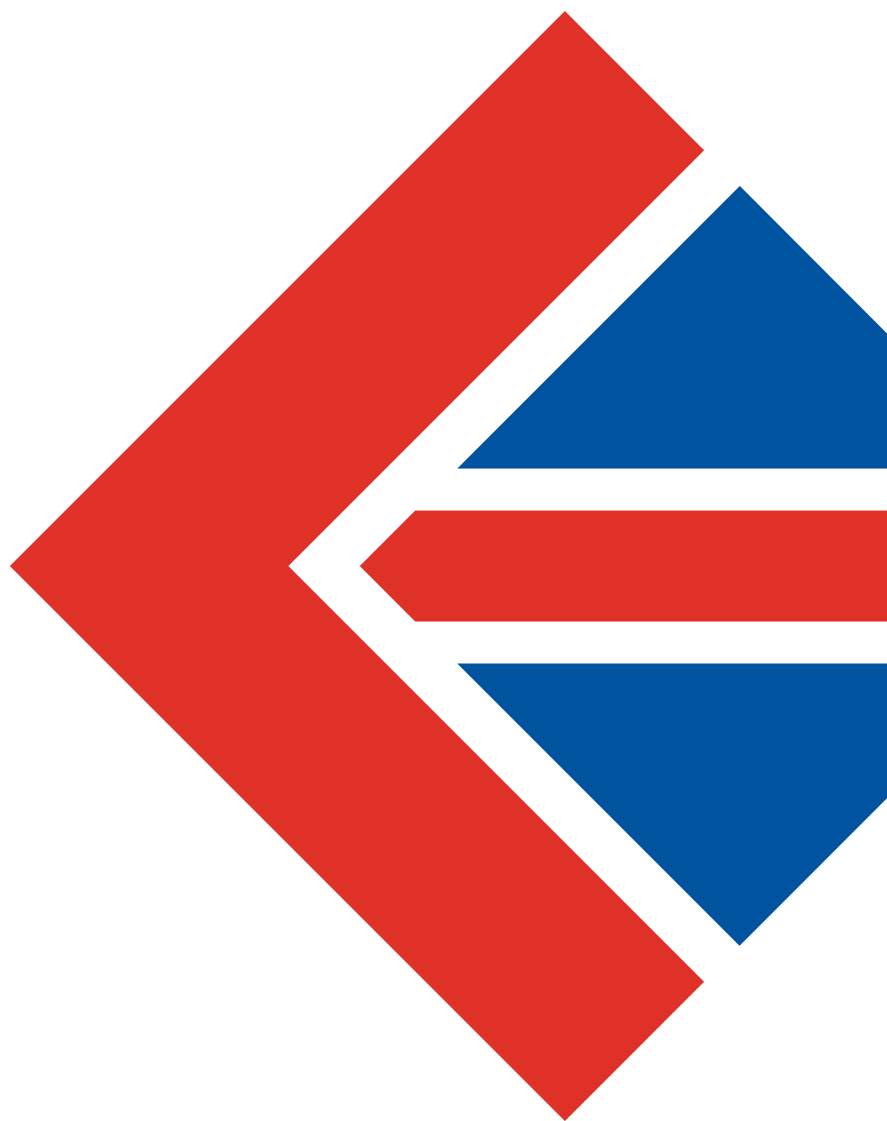


2013 ANNUAL STATISTICS REPORT

Trends in English language teaching, student numbers, taught time and world markets among English UK member centres 2012-13



Trends in English Language teaching, student numbers, taught time and world markets among English UK members 2012-13

Overview of 2013 trading figures:

- Approximately 585,504 individual students studied at our 476 state and private sector member centres, for an estimated 2,396,632 student weeks*.
- This shows an increase of 2.64 % in student weeks and 12.55% in student numbers, a positive change from 2012, when numbers were affected by the Olympic Games taking place in London.
- 501,324 students spent 1,996,649 weeks on ELT courses at our 390 private sector member centres.
- Almost 80 per cent of this taught time was for 296,242 adults, who spent almost 5.29 weeks here on average.
- Just over 20 per cent (22.98%) of this taught time was for 205,082 juniors, who spent almost 2.85 weeks here on average.
- The adult/junior student week ratio is the same as in 2012.
- The top five country markets for our private sector members were Italy, Spain, Rest of the Middle East, Russia and Saudi Arabia.

Note: Figures provided in this report have been compiled from different data sources: for an explanation, please see the background section at the end.

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

2012-13 FIGURES IN DETAIL

1. Private sector centres: students and where they come from

- Last year 501,324 individual students were taught for 1,996,649 weeks on English courses at our 390 private member centres.
- There were 296,242 adult students and 205,082 junior students, 77.02% and 22.98% of the total respectively.
- The top five country markets for these members were Italy, Spain, Rest of The Middle east, Russia and Saudi Arabia.

Table 1: 2013 annual return statistics (all 390 private sector members)

| Ranking | Country/Region | No. of student weeks* | Percentage of total student weeks* (%) |
|---------|------------------------------|-----------------------|--|
| 1 | Italy | 248,844 | 12.46 |
| 2 | Spain | 174,972 | 8.76 |
| 3 | Rest of Middle East | 132,130 | 6.62 |
| 4 | Russia | 112,353 | 5.63 |
| 5 | Saudi Arabia | 110,176 | 5.52 |
| 6 | Rest of Europe | 108,179 | 5.42 |
| 7 | France | 106,278 | 5.32 |
| 8 | Turkey | 105,886 | 5.30 |
| 9 | Brazil | 101,402 | 5.08 |
| 10 | Japan | 100,277 | 5.02 |
| 11 | S. Korea | 99,406 | 4.98 |
| 12 | China/Hong Kong | 86,771 | 4.35 |
| 13 | Switzerland | 86,034 | 4.31 |
| 14 | Germany | 69,469 | 3.48 |
| 15 | Rest of the World | 68,940 | 3.45 |
| 16 | Colombia | 56,936 | 2.85 |
| 17 | Thailand | 40,102 | 2.01 |
| 18 | Venezuela | 32,227 | 1.61 |
| 19 | Taiwan | 26,865 | 1.35 |
| 20 | Rest of Central & S. America | 26,450 | 1.32 |
| 21 | Mexico | 21,354 | 1.07 |
| 22 | Austria | 15,179 | 0.76 |
| 23 | Poland | 14,522 | 0.73 |
| 24 | Argentina | 13,999 | 0.70 |
| 25 | Czech Republic | 13,795 | 0.69 |
| 26 | Rest of Far East | 12,578 | 0.63 |
| 27 | Sweden | 11,525 | 0.58 |

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

2. State sector centres: increasing student numbers and taught time

- State sector members declare an annual ELT student week figure. For 2013 our 86 state sector centres taught an overall 399,983 student weeks.
- This represents a 6.97 increase from 372,095 in 2012 (number of state sector members itself has increased by 1.18 %).

3. More centres in English UK membership overall: more students and more teaching time in 2013

- Our 476 state and private member centres taught an estimated 585,504 students over 2,396,632 student weeks.
- This compares with 464 members in 2012 teaching 520,219 individual students over 2,335,010 student weeks.
- This is a percentage increase of 2.64 % in terms of absolute student weeks and a 12.55% increase in the estimated number of individual students.

4. Private centre business trends: comparing 2012 and 2013

As English UK membership fluctuates, with centres both leaving and joining during the year, the rest of this report uses data **only** from the 370 private centres which were members in both 2012 and 2013.

- There has been an overall increase of 16 centres since August 2013 and English UK members now account for just over 80 per cent of the UK's accredited centres.
- The 370 private sector centres which were in membership in both 2012 and 2013 saw individual student numbers increase from 416,757 in 2012 to 487,968. The adult/junior ratio was at 77.23% to 22.77%.
- Student weeks increased by 1.03 per cent, from 1,924,148 in 2012 to 1,943,896 in 2013. This is the first increase in a couple of years. Adult student weeks declined by 1.24% but Junior had a 9.55% increase. These adjustments did not affect the overall adult/junior ratio.
- Adults and juniors also took shorter courses. An average junior student stay dropped from 2.91 weeks in 2012 to 2.76 in 2013. Adults stayed for 5.47 weeks in 2012, and 5.25 in 2013.

Table 2: Comparison of 2013 and 2012 total student weeks* (for the 370 private sector centres in membership in both years)

| | 2013 | 2012 | 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 2013 |
| Adult/Junior | | | | |
| Adult Student Weeks | 1,501,177 | 1,520,033 | -18,856 | -1.24 |
| Junior Student Weeks | 442,719 | 404,115 | 38,604 | 9.55 |
| TOTAL | 1,943,896 | 1,924,148 | 19,748 | 1.03 |

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

Table 3: Comparison of 2013 and 2012 total number of individual students (for the 370 private sector centres in membership in both years)

| | 2013 | 2012 | Comparisons | |
|---------------------------|-----------------|-----------------|---------------------------|--|
| | no. of students | no. of students | Change in no. of students | % increase or decrease in no. of student in 2012 |
| Adult/Junior | | | | |
| Number of Adult students | 289,598 | 277,885 | 11,713 | 4.22 |
| Number of Junior Students | 198,370 | 138,871 | 59,499 | 42.84 |
| TOTAL | 487,968 | 416,756 | 71,212 | 17.09 |

5. Did geographical market shares change between 2012 and 2013?

Not much. The market share ranking of most of the 27 countries/areas we list has changed very little. Eight remain in the same place, and 12 have moved up or down by up to six places.

These rankings are very similar for English UK's entire private membership, and the slightly smaller group who have been members in 2012 and 2013. The only exceptions are Rest of Middle East and Turkey.

Table 4: Comparison of market share in 2013 and 2012 (for the 370 private sector centres in membership in both years) – listed in order of 2013 ranking.

| Country/Region | No. of student weeks* 2013 | % of total student weeks* (%) 2013 | Ranking 2013 | No. of student weeks* 2012 | % of total student weeks (%) 2012 | Ranking 2012 | Change in ranking |
|------------------------------|----------------------------|------------------------------------|--------------|----------------------------|-----------------------------------|--------------|-------------------|
| Italy | 236,061 | 12.14 | 1 | 251,646 | 12.82 | 1 | 0 |
| Spain | 165,220 | 8.50 | 2 | 197,917 | 10.08 | 2 | 0 |
| Rest of Middle East | 128,890 | 6.63 | 3 | 103,659 | 5.28 | 8 | 5 |
| Russia | 109,957 | 5.66 | 4 | 96,199 | 4.90 | 10 | 6 |
| Saudi Arabia | 108,282 | 5.57 | 5 | 112,965 | 5.75 | 4 | -1 |
| Rest of Europe | 106,031 | 5.45 | 6 | 107,451 | 5.47 | 6 | 0 |
| Turkey | 103,721 | 5.34 | 8 | 101,047 | 5.15 | 9 | 1 |
| France | 103,200 | 5.31 | 7 | 104,879 | 5.34 | 7 | 0 |
| Brazil | 100,362 | 5.16 | 9 | 113,517 | 5.78 | 3 | -6 |
| Japan | 98,986 | 5.09 | 10 | 93,844 | 4.78 | 11 | 1 |
| S. Korea | 97,738 | 5.03 | 11 | 111,502 | 5.68 | 5 | -6 |
| China/Hong Kong | 85,153 | 4.38 | 12 | 85,279 | 4.34 | 13 | 1 |
| Switzerland | 84,579 | 4.35 | 13 | 86,794 | 4.42 | 12 | -1 |
| Rest of the World | 68,126 | 3.50 | 15 | 45,645 | 2.33 | 16 | 1 |
| Germany | 67,845 | 3.49 | 14 | 70,325 | 3.58 | 14 | 0 |
| Colombia | 56,167 | 2.89 | 16 | 68,192 | 3.47 | 15 | -1 |
| Thailand | 39,036 | 2.01 | 17 | 40,107 | 2.04 | 17 | 0 |
| Venezuela | 32,055 | 1.65 | 18 | 21,403 | 1.09 | 19 | 1 |
| Taiwan | 26,735 | 1.38 | 19 | 26,461 | 1.35 | 18 | -1 |
| Rest of Central & S. America | 25,322 | 1.30 | 20 | 20,072 | 1.02 | 21 | 1 |
| Mexico | 21,206 | 1.09 | 21 | 20,656 | 1.05 | 20 | -1 |
| Austria | 14,531 | 0.75 | 22 | 14,346 | 0.73 | 24 | 2 |
| Poland | 13,935 | 0.72 | 23 | 15,258 | 0.78 | 23 | 0 |
| Argentina | 13,757 | 0.71 | 24 | 13,221 | 0.67 | 26 | 2 |
| Czech Republic | 13,301 | 0.68 | 25 | 15,376 | 0.78 | 22 | -3 |
| Rest of Far East | 12,388 | 0.64 | 26 | 14,225 | 0.72 | 25 | -1 |
| Sweden | 11,312 | 0.58 | 27 | 10,929 | 0.56 | 27 | 0 |

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

6. Are student weeks changing more in some markets than others?

The raw figures show more volatile changes in student behaviour in some countries than the rankings in the previous table suggest, with top two countries Italy and Spain both showing a significant decrease in student week numbers.

Table 5: Comparison of 2013 & 2012 student weeks* in individual markets (for the 370 private sector centres in membership in both years) – listed in order of 2013 student week figures

| Country/Region | No. of student weeks* 2013 | No. of student weeks* 2012 | Change in no. of student weeks* | % increase or decrease in no. of student weeks* in 2013 |
|------------------------------|----------------------------|----------------------------|---------------------------------|---|
| Italy | 236,061 | 251,646 | -15,585 | -6.19 |
| Spain | 165,220 | 197,917 | -32,697 | -16.52 |
| Rest of Middle East | 128,890 | 103,659 | 25,231 | 24.34 |
| Russia | 109,957 | 96,199 | 13,758 | 14.30 |
| Saudi Arabia | 108,282 | 112,965 | -4,683 | -4.15 |
| Rest of Europe | 106,031 | 107,451 | -1,420 | -1.32 |
| Turkey | 103,721 | 101,047 | 2,674 | 2.65 |
| France | 103,200 | 104,879 | -1,679 | -1.60 |
| Brazil | 100,362 | 113,517 | -13,155 | -11.59 |
| Japan | 98,986 | 93,844 | 5,142 | 5.48 |
| S. Korea | 97,738 | 111,502 | -13,764 | -12.34 |
| China/Hong Kong | 85,153 | 85,279 | -126 | -0.15 |
| Switzerland | 84,579 | 86,794 | -2,215 | -2.55 |
| Rest of the World | 68,126 | 45,645 | 22,481 | 49.25 |
| Germany | 67,845 | 70,325 | -2,480 | -3.53 |
| Colombia | 56,167 | 68,192 | -12,025 | -17.63 |
| Thailand | 39,036 | 40,107 | -1,071 | -2.67 |
| Venezuela | 32,055 | 21,403 | 10,652 | 49.77 |
| Taiwan | 26,735 | 26,461 | 274 | 1.04 |
| Rest of Central & S. America | 25,322 | 20,072 | 5,250 | 26.16 |
| Mexico | 21,206 | 20,656 | 550 | 2.66 |
| Austria | 14,531 | 14,346 | 185 | 1.29 |
| Poland | 13,935 | 15,258 | -1,323 | -8.67 |
| Argentina | 13,757 | 13,221 | 536 | 4.05 |
| Czech Republic | 13,301 | 15,376 | -2,075 | -13.50 |
| Rest of Far East | 12,388 | 14,225 | -1,837 | -12.91 |
| Sweden | 11,312 | 10,929 | 383 | 3.50 |

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

7. Background

Some of the figures in this report may not be directly comparable, for the following reasons:

- English UK's private and state sector members provide us with their student figures in different ways. Private sector centres are able to collect more detail about student age and country of origin. Public sector members provide only an annual ELT student week figure.
- Numbers of state and private centres in English UK membership fluctuate year on year.
- To give an overall picture of the state of the market we combine these figures in different ways. For year-on-year comparisons in the private sector, we include only the centres in membership during both years.
- A student week is one student studying for 10 or more contact hours per week.



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