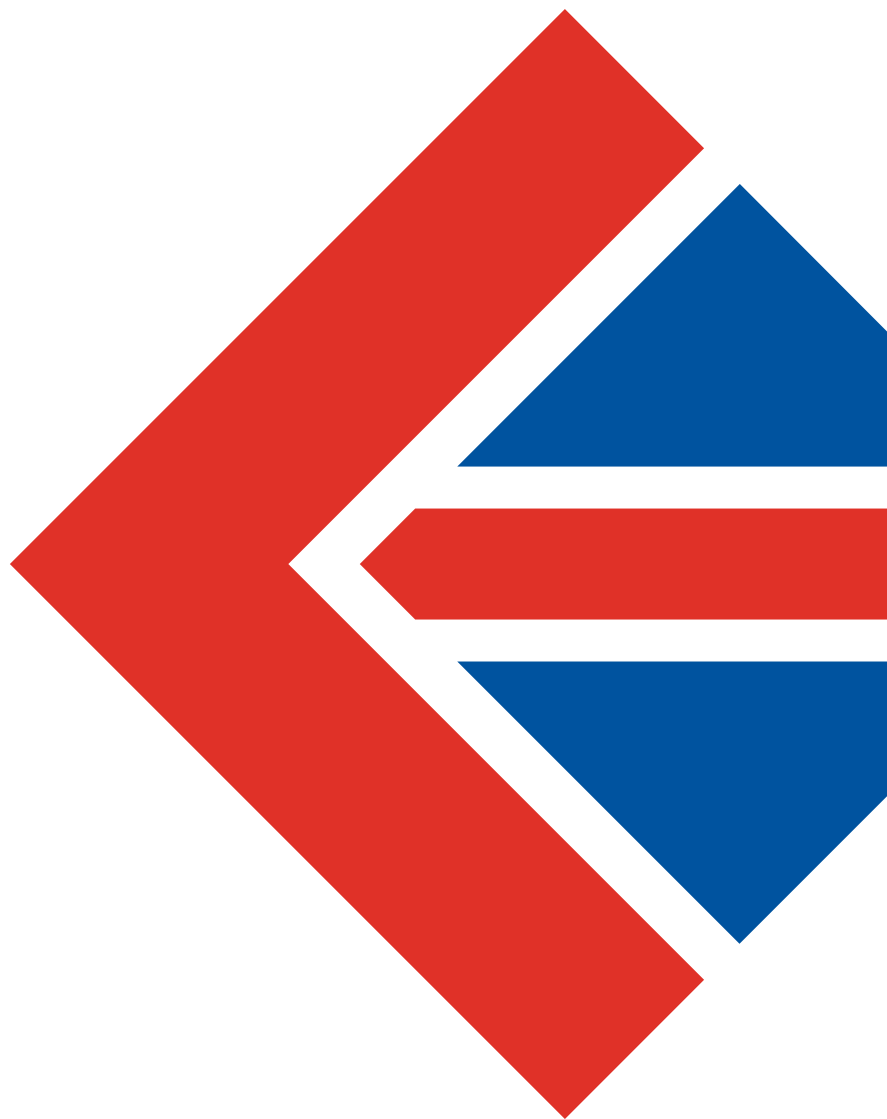


2012 ANNUAL STATISTICS REPORT

Trends in English Language teaching, student numbers, taught time and world markets among English UK member centres 2011-12



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Trends in English Language teaching, student numbers, taught time and world markets among English UK members 2011-12

Overview of 2012 trading figures:

- Approximately 508,176 individual students studied at our 462 state and private sector member centres, for an estimated 2,335,010 student weeks*.
- This shows a year-on-year decrease of 7.87% in student weeks and 4.70% in student numbers, the first for seven years, despite the number of member centres rising by six.
- 427,198 students spent 1,962,915 weeks on ELT courses at our 377 private sector member centres.
- Almost 80 per cent of this taught time was for 282,292 adults, who spent almost 5.5 weeks here on average.
- Just over 20 per cent of this taught time was for 144,906 juniors, who spent almost 2.9 weeks here on average.
- The adult/junior student week ratio is the same as in 2011.
- The top five country markets for our private sector members were Italy, Spain, Brazil, Saudi Arabia and South Korea.

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*

2011-12 FIGURES IN DETAIL

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

- Last year 427,198 individual students were taught for 1,962,915 weeks on English courses at our 377 private member centres.
- There were 282,292 adult students and 144,906 junior students, 78.67% and 21.33% of the total respectively.
- The top five country markets for these members were Italy, Spain, Brazil, Saudi Arabia and South Korea.

Table 1: 2012 annual return statistics (all 377 private sector members)

Ranking	Country/Region	No. of student weeks* in 2012	Percentage (%) of total student weeks* in 2012
1st	Italy	251,646	12.82
2nd	Spain	197,917	10.08
3rd	Brazil	113,517	5.78
4th	Saudi Arabia	112,965	5.75
5th	South Korea	111,502	5.68
6th	Rest of Europe	107,451	5.47
7th	France	104,879	5.34
8th	Rest of Middle East	103,659	5.28
9th	Turkey	101,047	5.15
10th	Russia	96,199	4.90
11th	Japan	93,844	4.78
12th	Switzerland	86,794	4.42
13th	China & Hong Kong	85,279	4.34
14th	Germany	70,325	3.58
15th	Colombia	68,192	3.47
16th	Rest of the World	45,645	2.33
17th	Thailand	40,107	2.04
18th	Taiwan	26,461	1.35
19th	Venezuela	21,403	1.09
20th	Mexico	20,656	1.05
21st	Rest of Central & South America	20,072	1.02
22nd	Czech Republic	15,376	0.78
23rd	Poland	15,258	0.78
24th	Austria	14,346	0.73
25th	Rest of Far East	14,225	0.72
26th	Argentina	13,221	0.67
27th	Sweden	10,929	0.56

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

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

- State sector members declare an annual ELT student week figure. For 2012 our 85 state sector centres taught an overall 372,095 student weeks.
- This represents a 3.71 decline from 386,434 in 2011, but the number of state sector members itself had declined by 3.41 per cent.

3. More centres in English UK membership overall: but fewer students and less teaching time in 2012

- Our 462 state and private member centres taught an estimated 508,176 students over 2,335,010 student weeks.
- This compares with 456 members in 2011 teaching 520,219 individual students over 2,534,580 student weeks.
- This is a percentage decrease of 7.87% in terms of absolute student weeks and a 4.70% decrease in the estimated number of individual students.

4. Private centre business trends: comparing 2011 and 2012

As English UK membership fluctuates, with centres both leaving and joining during the year, the rest of this report uses data **only** from the 363 private centres which were members in both 2011 and 2012.

There has been an overall increase of 10 centres since September 2012 and English UK members now account for just over 82 per cent of the UK's accredited centres.

- The 363 private sector centres which were in membership in both 2011 and 2012 saw individual student numbers decrease from 441,750 in 2011 to 416,757. The adult/junior ratio remained at 79% to 21%.
- Therefore, student weeks dropped by 8.35 per cent, from 2,099,558 in 2011 to 1,924,148 in 2012. This is the first decline in seven years. Adult and junior student weeks both declined. Junior weeks, which had grown steadily since 2005, were down by 7.98%. Adult weeks showed a 8.45% decrease. These adjustments did not affect the overall adult/junior ratio.
- Adults and juniors also took shorter courses. An average junior student stay dropped from 2.96 weeks in 2011 to 2.91 in 2012. Adults stayed for 5.66 weeks in 2011, and 5.47 in 2012.

Table 2: Comparison of 2012 and 2011 total student weeks* (for the 363 private sector centres in membership in both years)

Adult/Junior	Total no. of student weeks in 2012	Total no. of student weeks in 2011	Change in no. of student weeks	Percentage (%) increase/decrease in no. of student weeks in 2012
Adult student weeks	1,520,033	1,660,409	-140,376	-9.57
Junior student weeks	404,115	439,149	-35,034	-7.72
TOTAL	1,924,148	2,099,558	-175,410	-8.35

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

Table 3: Comparison of 2012 and 2011 total number of individual students (for the 363 private sector centres in membership in both years)

Adult/Junior	Total no. of individual students in 2012	Total no. of individual students in 2011	Change in no. of individual students	Percentage (%) increase/decrease in no. of students in 2012
Adult students	277,885	293,555	-15,670	-5.34
Junior Students	138,871	148,194	-9,323	-6.29
TOTAL	416,757	441,749	-24,992	-5.66

5. Did geographical market shares change between 2011 and 2012?

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 two places.

These rankings are very similar for English UK's entire private membership, and the slightly smaller group who have been members in 2011 and 2012. The only exceptions are Rest of Middle East, Rest of Far East, and Colombia.

Table 4: Comparison of market share in 2012 and 2011 (for the 363 private sector centres in membership in both years) – listed in order of 2012 ranking

Country	Total no. of student weeks* in 2012	% of total student weeks* in 2012	Rank	Total no. of student weeks* in 2011	% of total student weeks* in 2011	Rank	Change in ranking
Italy	241,740	12.56	1	234,663	11.18	1	0
Spain	193,379	10.05	2	224,779	10.71	2	0
Brazil	112,706	5.86	3	112,653	5.37	7	4
South Korea	110,440	5.74	5	125,703	5.99	4	-1
Saudi Arabia	109,119	5.67	4	116,700	5.56	6	2
Rest of Europe	105,859	5.50	6	117,792	5.61	5	-1
France	103,337	5.37	7	106,809	5.09	9	2
Rest of Middle East	101,470	5.27	8	129,872	6.19	3	-5
Turkey	99,475	5.17	9	115,975	5.52	8	-1
Russia	94,841	4.93	10	95,134	4.53	10	0
Japan	93,464	4.86	11	80,971	3.86	14	3
Switzerland	86,154	4.48	12	82,090	3.91	13	1
China/Hong Kong	84,097	4.37	13	82,637	3.94	12	-1
Colombia	67,521	3.51	15	90,676	4.32	11	-4
Germany	66,377	3.45	14	75,878	3.61	15	1
Rest of the World	43,621	2.27	16	65,331	3.11	16	0
Thailand	39,628	2.06	17	50,932	2.43	17	0
Taiwan	26,344	1.37	18	27,898	1.33	18	0
Venezuela	21,359	1.11	19	19,400	0.92	22	3
Mexico	20,370	1.06	20	20,656	0.98	21	1
Rest of Central & S America	20,051	1.04	21	24,536	1.17	19	-2
Czech Republic	15,328	0.80	22	16,590	0.79	25	3
Poland	14,981	0.78	23	16,555	0.79	24	1
Austria	14,295	0.74	24	18,078	0.86	23	-1
Rest of Far East	14,099	0.73	25	22,270	1.06	20	-5
Argentina	13,185	0.69	26	12,323	0.59	26	0
Sweden	10,908	0.57	27	12,658	0.60	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 five countries Spain and South Korea both showing significant drops in student week numbers, though these are small compared with Thailand and Colombia.

Table 5: Comparison of 2012 & 2011 student weeks* in individual markets (for the 363 private sector centres in membership in both years) – listed in order of 2012 student week figures

Country	Total no. of student weeks in 2012	Total no. of student weeks in 2011	Change in total no. of student weeks	% increase or decrease in no. of student weeks in 2012
Italy	241,740	234,663	7,077	3.02
Spain	193,379	224,779	-31,400	-13.97
Brazil	112,706	112,653	53	0.05
South Korea	110,440	125,703	-15,263	-12.14
Saudi Arabia	109,119	116,700	-7,581	-6.50
Rest of Europe	105,859	117,792	-11,933	-10.13
France	103,337	106,809	-3,472	-3.25
Rest of Middle East	101,470	129,872	-28,402	-21.87
Turkey	99,475	115,975	-16,500	-14.23
Russia	94,841	95,134	-293	-0.31
Japan	93,464	80,971	12,493	15.43
Switzerland	86,154	82,090	4,064	4.95
China/Hong Kong	84,097	82,637	1,460	1.77
Colombia	67,521	90,676	-23,155	-25.54
Germany	66,377	75,878	-9,501	-12.52
Rest of the World	43,621	65,331	-21,710	-33.23
Thailand	39,628	50,932	-11,304	-22.19
Taiwan	26,344	27,898	-1,554	-5.57
Venezuela	21,359	19,400	1,959	10.10
Mexico	20,370	20,656	-286	-1.39
Rest of Central & S America	20,051	24,536	-4,485	-18.28
Czech Republic	15,328	16,590	-1,262	-7.61
Poland	14,981	16,555	-1,574	-9.51
Austria	14,295	18,078	-3,783	-20.93
Rest of Far East	14,099	22,270	-8,171	-36.69
Argentina	13,185	12,323	862	6.99
Sweden	10,908	12,658	-1,750	-13.82

*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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