

# English Language Market Report: Spain

A report prepared for the UK's English language sector

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# Forewords

Welcome to the British Council market research report into the Spanish language education market.

This comprehensive market study is the first of a new series of ELT market research reports that we are preparing to support UK ELT providers in recruiting students from overseas to UK language programmes.

This series will focus on the key markets overseas that are vital for the work of accredited UK English language providers, and we welcome feedback and input from providers about the markets they would like to see represented.

The British Council is committed to supporting the UK ELT industry and promoting the value of UK ELT schools through our network of offices and schools overseas.

English language students are very important to the UK – they bring direct and indirect income to the UK economy, and their experiences in living and studying in the UK lead to a lifelong connection with the UK and its citizens.

Building this kind of cultural relations connection is what our work is about – we are committed to building trust and engagement between people of different nations and cultures, through the exchange of knowledge, ideas and experience.

I hope this report will help UK ELT providers gain insights into how the Spanish language education market works, and assist them in building a closer connection with Spanish education providers and Spanish students.

We are planning future titles in this series and look forward to input from providers with suggestions for these.

**Michael Carrier**

Head English Language Innovation

I am delighted to write this preface for the *English Language Market Report: Spain*, the first of several we are commissioning for the British Council. Our aim is to support the UK English language constituency's efforts to attract Spanish students by providing a comprehensive guide to the market and contributing to the development of effective marketing strategies.

Currently, the bilateral relationship is in excellent shape. Both countries are open market economies and increasingly interdependent. The UK is the largest foreign investor in Spain, with some 700 companies in country, and currently attracts one in ten of all Spanish companies setting up in Europe. We share specific challenges and opportunities in areas such as regionalisation and decentralisation, climate change, migration, the growth of the knowledge economy and the requirement for an ever more skilled, inter-culturally competent and globally aware workforce.

The English language is obviously central to this relationship, and remains very much at the heart of the work of the British Council in Spain in this, our 70th anniversary year. We aim to play a key role promoting UK excellence in the area of the English language, acting as exemplars of good practice and as key contributors to Spanish life.

We are therefore keen to work closely with the UK English language sector, helping students to make the right study choices and institutions to access the market. Some 40,000 Spanish students visit the UK each year to develop their English language skills. We already enjoy considerable market share, but current economic difficulties and increasing competition from other English-speaking countries mean that we cannot take this for granted. As the report indicates, now is a good time for the UK sector to reconsider and reinforce their marketing if we are to retain and increase our market share.

We hope very much that you find this profile useful, and look forward to hearing from you about how best we might add value to your efforts in the future.

Best wishes,

**Rod Pryde**

Director British Council Spain

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# 1 Preface

This report was commissioned by the British Council with a view to helping the UK English language sector attract Spanish students to their schools.

Currently, over 40,000 Spanish students visit the UK each year to develop their English language skills. This represents approximately five per cent of the total numbers that go to the UK to improve their English<sup>1</sup> and around 50 per cent of Spanish students who take English language courses abroad.

However, due to the economic downturn, the bursting of the tourism and construction bubbles, the recent austerity measures introduced by the Spanish government and other socio-economic factors, Spaniards are less likely to undertake courses abroad. The recent decline in Euro buying power will attract students to those countries where their funds will stretch the most; such as Eire, Malta, South Africa and Canada.

The outlook for the English language market over the coming years is therefore not as positive as it has been over the past decade, when schools could rely on a steady stream of Spanish students attending courses in the UK. Indeed, the impact can already be noticed, with Spain dropping from second to fourth place in terms of students attending courses at accredited private language schools<sup>1</sup>.

This means that UK language schools will have to reconsider and reinforce their marketing strategies if they wish to maintain their historical strength in attracting Spanish students to the UK.

This timely report provides suggestions as to how the sector can maximise its impact on Spanish students, parents and other influencers to help ensure that the relationship between the two countries is strengthened, in spite of the current socio-economic difficulties.

<sup>1</sup> According to English UK, 38,000 attended accredited private English language centres. Figures for those attending FE/HE and non-accredited private schools are not available.

## 2 Background information on Spain

### 2.1 General economic background

With a population of some 46 million<sup>2</sup> Spain is Europe's fifth largest economy and ranks tenth in the world<sup>3</sup>.

Spain has suffered more than most countries from the recession of the past two years, due primarily to the collapse of its tourism and construction industries. As of February 2010, Spain's economy was still in recession, lagging behind all other major economies, and it is not expected to return to (slow, minimal) growth until the second half of 2010<sup>4</sup>. The IMF predicts that in 2011, Spain will experience a growth of less than one per cent<sup>5</sup>.

Prior to the recession, Spain's economic growth rate had been one of the highest in Europe, but in the past two years unemployment has soared to over 20 per cent, with GDP having declined at 3.1 per cent in 2009 (an improvement on the previous year!). The hardest-hit part of the population has been the 18–25 year olds, with unemployment averaging 40 per cent.

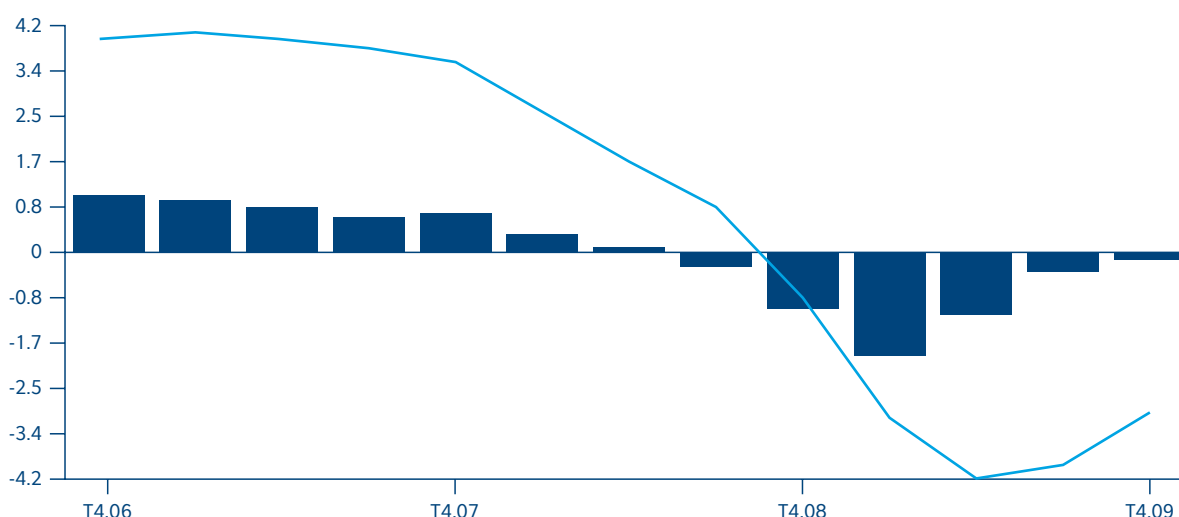
In addition, the Spanish government has been forced to introduce a series of austerity measures, including restrictions on recruitment into the Civil Service, a de-linking of pensions from the rate of inflation and the firing of government workers on temporary contracts<sup>5</sup>.

With the recent depreciation of the Euro, courses abroad have become that much more expensive, leading to more Spaniards seeking alternative language learning opportunities such as online courses and 'summer camps' arranged in Spain.

However, Spain's economic woes may not be as bad as they once appeared to be: national debt stands at 58 per cent of GDP<sup>6</sup>, much lower than many other European countries; and a government bond issue in July attracted more buyers than expected (especially from Asia), reinforcing confidence not only in Spain but also the Euro. Also, the winning of the World Cup in South Africa will have boosted Spanish self-confidence.

Public sector employees have jobs for life, short working hours (08.00–15.00), allowing them to undertake second jobs, while the public sector trade unions are still very powerful, thus ensuring that a substantial part of the working population still enjoys a high quality of life<sup>7</sup>. The austerity measures affect primarily the temporarily employed, those not yet in employment and pensioners, few of whom are key client<sup>8</sup> segments for UK schools (see section three, below).

With the high rate of unemployment among the young, family investment in education is on the increase, with universities reporting record numbers of applicants. This might work in favour of UK language schools, or at least ameliorate the impact of the negative economic trends to some extent.



Spain's GDP 2006-2009 – Quarterly and Annual Change

<sup>2</sup> Instituto Nacional de Estadística

<sup>3</sup> World Bank, Sept 2009

<sup>4</sup> BBC, Feb 2010

<sup>5</sup> The Economist – *The Mañana Syndrome*, 25 March 2010

<sup>6</sup> Financial Times 12 July 2010

<sup>7</sup> The Economist – *The Pain in Spain*, 3 June 2010

<sup>8</sup> Students ('customers') are primarily funded by their parents (the 'clients')



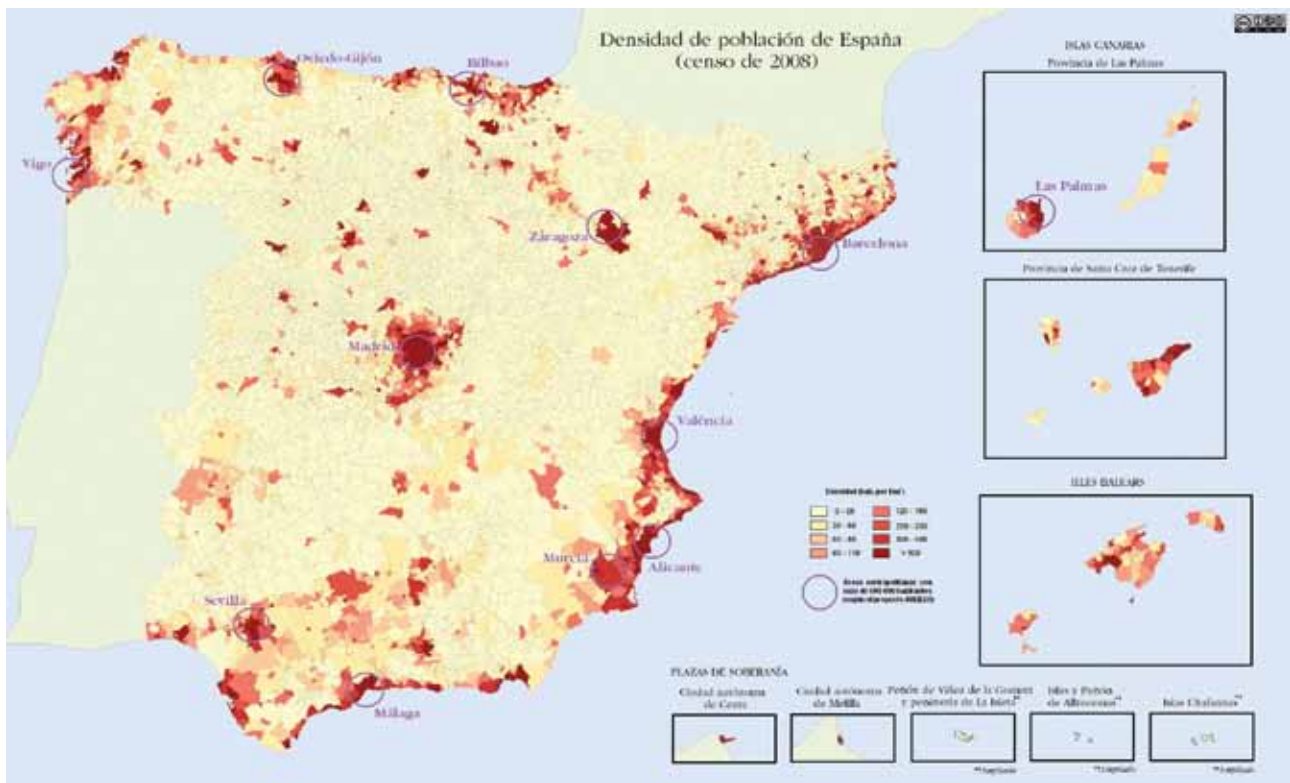
## 2.2 Demographics

After falling dramatically in the last quarter of the 20th century, the population birth rate has again been rising to approximately 11 per 1,000. The main driver for the rise in population has been immigration, especially from Latin America, Eastern Europe and Africa. Immigrants now account for over 5.2 million of the population, with the children of immigrants making up ten per cent of the state school population, mostly in the primary sector.

Immigration also accounts for the (slight) increase in the numbers of children attending state schools, even though the population growth rate is stable.

Over the past three decades, there has been widespread movement from the countryside to the cities and coastal areas, a process that occurred much later in Spain than in other European countries. Even now, most Spaniards still have their 'homes' in country villages and return to them for the summer holidays.

The Madrid and Barcelona regions are the main centres of population and business, but other areas in Spain are developing quickly – Bilbao, Valencia, Alicante, Zaragoza, Sevilla and Malaga are all investing heavily in infrastructure and knowledge-based industries, especially since tourism (and its associated second home industry) has proven to be fragile.



## 2.3 The Spanish education system

State education in Spain is free, with compulsory education lasting from six to 16 years of age.

Spain is a founding member of the European Higher Education Area, whose members recognise each others' study periods and degrees. **The Bologna Agreement**<sup>9</sup> means that students are free to undertake pre- and postgraduate courses anywhere within the 29-country EHEA zone and it is likely that Spanish students will take advantage of this (although perhaps there will be more incoming than outgoing students!). As yet, the full impact of this agreement remains unclear in Spain, although some areas are undergoing development: Spanish universities have had to conduct major changes to their curricula to fall in line with the guidelines of the agreement, and the rest of the school system is still trying to catch up to these changes.

European Community (EC) language policies are having a direct impact on school curricula, with more and more schools providing bilingual (or trilingual) education, starting at primary level. It is estimated<sup>10</sup> that over one million children, mostly at primary level, are taking content subjects in bilingual or trilingual schools.

The Spanish education system is structured as follows:

Stage of education	Age/comments
Pre-school ( <i>Presecolar</i> ) – CINE 0 <sup>11</sup>	
Nursery/Kindergarten ( <i>Infancia</i> )	Mostly private, not compulsory
Pre-school <i>Primer ciclo infantil</i> <i>Segundo ciclo infantil</i>	State-funded, but not compulsory
Primary school ( <i>Primaria</i> ) – CINE 1	
First cycle	6–7 yrs
Second cycle	8–9 yrs
Third cycle	10–11 yrs
Secondary education ( <i>Educación Secundaria Obligatoria, ESO</i> )	
First cycle – CINE 2	12–13 yrs
Second cycle – CINE 3	14–15 yrs
Post-compulsory education ( <i>Bachillerato</i> ) – CINE 4	
Post-secondary, non-tertiary education to prepare students for entrance to higher education.	Core curriculum, including at least one non-Castilian language, plus standard specialisms
Post-secondary education	
Graduate degree – CINE 5	University or vocational ( <i>Formación Profesional</i> ) studies
Postgraduate degree – CINE 6	

See also Annexe one – The Spanish education system (simplified).

Approximately 70 per cent of Spain's student population attends public schools or universities (see Annexe two, 7 Number of non-university students in Spain 2009–2010). The remainder attend private schools or universities, the great majority of which are operated by the Catholic Church.

It is important to note that educational policy is heavily devolved to regional authorities, and educational policies can vary greatly across the country, especially in the areas that have their own regional language (the Basque region, Catalunya, Galicia).

<sup>9</sup> [http://en.wikipedia.org/wiki/European\\_Higher\\_Education\\_Area](http://en.wikipedia.org/wiki/European_Higher_Education_Area)

<sup>10</sup> British Council source

<sup>11</sup> CINE – *Clasificación Internacional Normalizada de la Educación* = ISCED classification  
[www.unesco.org/education/information/nfsunesco/doc/isced\\_1997.htm](http://www.unesco.org/education/information/nfsunesco/doc/isced_1997.htm)

## 2.4 Spain's strategy for English

Until Franco's death in 1975, French had been the primary second language studied at all schools, and regional languages had been forbidden in state-funded institutions. Many middle-aged Spaniards thus never studied English at school and, for three decades (1970–2000), this helped the private language school industry to thrive both in Spain and the UK.

Shortly after Franco's death, the government changed language learning policies to ensure that students received education in their regional language and concurrently established English as the primary foreign language. At the time, this created huge problems within the education sector, since there were relatively few English language teachers (teachers of French were forced to teach English, however poor their own skills); but with time and new recruits, English language tuition has improved immensely.

Spaniards have traditionally found speaking English difficult (especially when it comes to pronunciation), and this is not helped by the fact that foreign films and television programmes are dubbed into Spanish or the regional language. Well aware of the problem of poor English and the need to improve the population's language skills, the Spanish and autonomous community governments have established a number of initiatives, of which the most striking are:

- **The Escuelas Oficiales de Idiomas**<sup>12</sup>, consisting of over 300 schools or centres throughout Spain, which offer free language tuition and officially-recognised certificates at three levels: Basic, Intermediate and Advanced.
- **Grants** and direct financial support for the study of foreign languages, especially English, amounting to €73 million per year (see also: Annexe two, Investment in Education).
- The employment in state schools of more than 2,800 language teaching assistants, of whom over 1,200 are North American (North American Language and Culture Assistants programme<sup>13</sup>), subsidised by the Spanish Ministry of Education. The British Council is involved in a similar programme, placing 570 assistants into state sector schools on behalf of the Spanish Ministry of Education.
- The Spanish Ministry of Education–British Council **Bilingual Schools Project**<sup>14</sup>, which has proven highly successful in developing children's levels of English, as well as their cognitive skills in 122 schools.
- The bilingual schools being established by each Comunidad Autónoma. The number of schools (and the percentage of the total number of schools for which the CA is responsible) varies considerably, from around 30 in Cantabria to over 300 in Madrid. Bilingual education is generally implemented at primary level and then rolled out into secondary level. The trend is clear: more and more schools are expected to provide bilingual education or CLIL (content and language integrated learning).

<sup>12</sup> [www.eeooiinet.com/n\\_eeooiinet/](http://www.eeooiinet.com/n_eeooiinet/)

<sup>13</sup> [www.mec.es/sgci/usa/en/programs/us\\_assistants/default.shtml](http://www.mec.es/sgci/usa/en/programs/us_assistants/default.shtml)

<sup>14</sup> [www.britishcouncil.org/spain-education-bilingual-project.htm](http://www.britishcouncil.org/spain-education-bilingual-project.htm)

# 3 The current market for English language courses abroad

## 3.1 Background and market segments

Over 38,000<sup>15</sup> students visit the UK each year to improve their English on either short (one to four-week) or long (over one month) courses. The students can be subdivided into categories as follows:

### **Category one:**

**Primary and ESO<sup>16</sup> school students six to 16 years old:** since English is a compulsory subject at all Spanish schools and a requirement for progression through the school system, parents are willing to support their children's additional language learning needs, especially for exam preparation. Many schools also organise school groups to attend 'summer camps', whether in Spain or the UK for their students. See Vaughan Towns<sup>17</sup> as an example of this trend.

### **Category two:**

**Bachillerato<sup>18</sup> students 16–19 years old:** These students are entering a competitive academic stream, and a good knowledge of English is an important factor in their success for attending university, whether in Spain or abroad. As the Bologna Agreement becomes more entrenched within Europe, it is likely that Spanish students will seek to study in the UK, Germany or other European countries in ever-increasing numbers. In addition, North America has many attractions for the richer segments of the population.

### **Category three:**

**Undergraduate and postgraduate students:** Until recently, all public universities had to teach all subjects in either Castilian or the local national language (Catalan, Basque and Gallego). In the past decade, a number of private business schools began offering bilingual (Spanish–English) curricula and universities are now realising the importance of following suit in order to attract students from abroad. This means that there is now a high demand for good English language skills at university level, and many students who had not foreseen this now need to catch up.

In addition, the Bologna Agreement means that Spanish students can get their initial degrees in Spain and then obtain a masters degree in another country (or, indeed, vice-versa). Masters degrees will increasingly be delivered in the medium of English, whichever country they take place in. A number of masters degrees already offer tuition in two or even three locations across Europe (a strategy supported by the EU's language policy and educational grants), with all formal delivery and assignments being in English. This is a key market for EAP (English for Academic Purposes).

### **Category four:**

**(Trainee) teachers:** The Spanish and CA governments invest substantial resources in the development of (mostly English) language teachers. In addition to the graduate stream, there is a *Formación Profesional* stream that allows people to enter language teaching without going through a formal university carrera (degree programme). While the focus is still on the language, there is a real concern that language teaching methodology is outdated and that these trainees in particular have insufficient skills to deliver the bilingual/CLIL curricula now being rolled out across the educational system.

### **Category five:**

**Individual professionals and executives:** Spain enthusiastically joined the European Union in 1986. This was a key milestone in terms of the government's focus of language learning. Prior to that date (1975–1985), the focus had been on developing the place of national languages in regions such as Catalunya, the Basque region and Galicia. In most of these regions, the 'national' language was made obligatory at all schools and universities. Once Spain joined the EU, the population in general realised that having their children grow up speaking a 'regional language' put them at a severe disadvantage in comparison with not only their peers in Castilla, Aragon and Andalucia, but also the wider populations of the EU.

Thus, it is only in the past decade or so that the various regional governments have acknowledged the importance of English and have undertaken major efforts to improve the population's English language competencies, in addition to Castilian as a second language.

There exists therefore a large group of 30–40-year-olds who did not have great opportunities to learn English while at school, and whose English is deficient to a greater or lesser extent for effective business practice. These professionals are now expected to be able to operate in fluent English by their companies, and career progression may depend at least to some extent on their English. They are therefore willing to invest in high value-added courses, very often on a private basis.

<sup>15</sup> English UK private accredited school figures, excluding FE/HE institutions and private non-accredited schools.

<sup>16</sup> Escuela Secundaria Obligatoria.

<sup>17</sup> [www.grupovaughan.com/index.php?option=com\\_content&view=article&id=49&Itemid=16](http://www.grupovaughan.com/index.php?option=com_content&view=article&id=49&Itemid=16)

<sup>18</sup> Post-obligatory academic education, usually for university entrance.

#### **Category six:**

**Corporate markets:** Some of the larger organisations in the Spanish corporate sector have been hugely successful in the past decade or so in their inter-nationalisation strategies. Examples include *Banco Santander*, *Union Fenosa*, *Telefónica* and *Iberdrola*. These companies began their international expansion into Latin America in the 1990s and then moved into Europe, the USA and Asia. This has resulted in a dearth of English-speaking executives who can deal effectively with their subsidiaries and suppliers in non-Spanish-speaking countries.

In parallel to the government, Spanish corporations are now investing heavily in developing the English language skills of their middle and senior management.

### **3.2 Target countries for English language learning**

According to interviewed agents, the UK is still the favoured destination, due to its proximity, (travel) price and expected quality of education. Some 50 to 60 per cent of those going overseas will head for the UK. However, other countries are making inroads and their market share was increasing until the Euro lost value in early 2010:

- The USA still has cachet, especially among the upper middle classes and the corporate sector (whose head offices might be in the US). Some 15 to 20 per cent of students wish to go to the US for their language enhancement.
- The final 20 to 35 per cent is divided among Malta, Eire, South Africa, Australia, New Zealand and Canada.

### **3.3 Funding studies overseas**

The funding of overseas study visits comes primarily from four sources:

#### **Parents:**

It is normal for Spaniards to continue their education well into their 20s. Thus, parents expect (and are expected) to pay for tuition fees until their children obtain full-time jobs at around the age of 25 or so (this is one reason why the unemployment rate of this group is so much higher than in the rest of Europe). It also means that parents have a major role to play in any decision-making regarding where their children (including graduates) will undertake their studies. General English language learning and the selection of schools is therefore very much a family affair. While the student him/herself might make the initial trawl, the final (funding) decision will be made by parents.

#### **Spanish government(s) and EU grants:**

The Spanish government itself provides €73 million in grants, primarily to teachers and trainee teachers for intensive language training. Other grant-funding bodies include the EU, especially the **Erasmus Programme**<sup>19</sup>:

- In 2008–2009, 27,400 Spanish students benefited from Erasmus funding, just behind Germany (27,900) and France (28,300). (Spain ranks first as recipient country of Erasmus students.)
- Spain (3,700 beneficiaries) was second only to Poland (4,300 beneficiaries) for staff mobility periods and, again, second to Poland for teaching assignments abroad (2,900 to Poland's 3,100).
- Staff training accounted for another Spanish 760 placements under the Erasmus scheme.

#### **Self-funded studies:**

Some professional and executive students will pay either in whole or in part for themselves, which gives them greater freedom of choice when it comes to selecting a language school. Although precise figures are hard to come by, it is likely that this source of funding is the smallest overall.

It should be noted that in the past decade, the numbers of students from middle to upper middle class families undertaking extended periods of study in the USA or the UK has increased considerably. This provides them with significant linguistic advantages in the job market, even if it means separation from the family for a period of time (a culture shift in this group).

#### **Company/corporate funding:**

More and more companies are either directly sourcing their language teachers in Spain or outsourcing to trusted providers. Companies are concerned about the loss of productivity during the training process, and are interested in e-learning solutions and intensive company-specific group training (which also enhances intra-company communication and team building). As training budgets come under pressure, funding for individuals taking language courses abroad is declining and tends to be reserved for only the most senior managers on intensive high value-added (one to one) programmes.

<sup>19</sup> <http://europa.eu/rapid/pressReleasesAction.do?reference=MEMO/10/267&format=HTML&aged=0&language=EN&guiLanguage=en>

### 3.4 The buying process/marketing chain

The following steps can be identified in the buying process:

#### **Step one: Identification/acceptance of need**

Whether it be parents wanting their children to have a better opportunity at school or an individual executive wanting to improve his/her English, there is generally a barrier to be overcome at this stage – with the exception of some language teachers, few want to learn English for its own sake (i.e. are integratively motivated). More and more, agents are noticing that their clients have specific objectives in mind when searching for courses, rather than looking for 'general English'.

At company level, CLOs<sup>20</sup> of Spanish companies are increasingly under pressure to ensure that their workforces have the appropriate levels of English language competence. This contrasts with other European companies where employees are expected to have the linguistic skills on recruitment. When recruiting in Spain, multinational companies are prepared to pay a premium to attract bilingual and trilingual executives, whereas Spanish companies have to provide in-company training programmes to raise the language skills of their workforce.

#### **Step two: Initial trawl**

Spanish buying habits are still heavily dependent on personal relationships and networks. In most cases<sup>21</sup>, the client/buyer will seek a trusted source of information. This could be a teacher, a friend, someone who has experienced an overseas course. If such a source is not easily available, the client<sup>22</sup> will seek out an agent and perhaps conduct initial enquiries. What matters most here is trust in the intermediary/source of information.

At this point in the process, the client is likely to decide on target country and/or target programme to be undertaken. Broad costings (overall travel, accommodation, programme fees, etc.) will be assessed.

Where a student has been studying at a private language school, and the school offers specially organised 'summer camps' or programmes, the client may opt for this solution.

Companies and other organisations may prepare an invitation to tender, although this is uncommon<sup>23</sup>.

#### **Step three: Option selection**

This step may be bypassed, if the trusted source comes up with an 'ideal' solution immediately (see above). More frequently, the client will now begin a more detailed comparison process. Such a process might include:

- In-depth discussion with a school's placement service, if it has one. This is the most common approach.
- In-depth (follow-up) discussions with an intermediary agent/agency.
- Internet-based searches, chats and discussions. Used primarily by 15–25-year-olds to influence their parents.
- Close reading of brochures and websites. This does not appear to be habitual, although 15–25-year-olds will make quick visits to assess the quality of the UK school's website.

The exception to this is when someone is seeking an online solution. In these cases, close attention is paid to alternative providers. Most web-based learning providers offer a 'pot-pourri' of vocabulary and grammar exercises, chat rooms and blogs. Few offer structured learning programmes and even fewer offer programmes leading to Spanish qualifications.

- Direct contact with the shortlisted schools/providers (relatively infrequent)

CLOs may ask a shortlist of potential providers to present proposals and options.

<sup>20</sup> Chief/Corporate Learning Officers, a term used here to denote anyone with budgetary responsibility for training and development in a company.

<sup>21</sup> According to ten interviews.

<sup>22</sup> Defined as the person buying the service, although not necessarily using it (the 'customer').

<sup>23</sup> Only one respondent out of ten CLOs mentioned this step being taken.

#### **Step four: Final selection**

Once the previous steps have been undertaken, the client/customer will make the final selection based principally on the following criteria (varying in importance depending on the client/customer):

- **Safety/security/support:** Ideally, parents want to have a teacher or a representative of a school/agency that they trust to be available to their child and also to them (as a 'go-between'). Good communication between parent and child is critically important and, should this prove a problem, can cause major upset. For example, if there is poor mobile coverage in a particular area, this can create unease and parental complaints. Good agencies will provide such a service, with representatives visiting the schools where they have placed customers to ensure all is going well.
- **(Expected) quality of delivery:** Including (guaranteed) academic progress, location and environment, extra-curricular activities and accommodation.
- **Overall cost:** Including travel, accommodation, fees, and supplementary charges. Courses in the UK tend to be more expensive, but travel costs are lower, whereas courses in North America are the reverse. Overall, there is little difference in the total cost of the package to the client, and this therefore tends to come lower down the list of priorities/selection criteria.
- **Weather:** Closely linked to location, Spaniards will seek the sun in summer wherever possible for their short courses. Malta and certain areas in the USA offer more guarantee of summer sun and are attractive for this reason.
- **Location:** In the UK, London, Oxford, Cambridge and the South Coast are still the most popular choices. Other locations may be selected for specific personal reasons, or because course fees are lower. Good communications (especially nearby airports) and a perception of accompaniment (being met by school representatives) are factors taken into consideration.



## 4 Developing a marketing strategy

In this section, marketing strategies for different kinds of EFL provision are proposed. The overall principle is to make a positive impression as far up the buying chain as possible (i.e. as close as possible to step one, above), so as to increase the probability of being selected as the supplier.

The focus of this section is therefore on providing suggestions that lie outside the ‘traditional’ means of promotion (brochure distribution, advertising, email campaigns, etc.), although naturally these will form an important part of the marketing effort for UK schools.

As previously mentioned, the Spanish market is especially reliant on personal contacts and trusted relationships. Therefore, UK schools that can establish direct personal relationships with clients and influencers will gain market share. These relationships do take time to establish, but are then long lasting and, in the end, cost effective.

Each target market in Spain has its own specific influencers, entry points and pathways, and each provider will develop its own strategy based on preferred target groups. Some suggested strategies are outlined below. See the section on Approaching market segments for specific suggestions as to how to approach each market segment.

### 4.1 Attracting category one: Six to 15-year-old students

Category one students form the bulk of ‘traditional General English’ programmes and are a key target group for agents. This group is heavily influenced by parental concerns. Key trends to be noted are:

- An increasing focus on the need to pass **ESO examinations** in English. Schools that can demonstrate at least some familiarity with these exam requirements will be attractive to parents, who are seeking a ‘guaranteed’ return on their investment. Supplementary lessons for ESO exam preparation might also be appealing.
- With the development of bi/trilingual education, and as students who started their bilingual education at primary level move up into secondary school, it is likely that **this market will decline** over the mid (five years) to longer (ten years) term. This will increase the competition to attract this target group. Schools that prepare a longer-term strategy will have a distinct advantage. The overall strategy should focus on developing closer relationships with key influencers such as *Comunidad Autónoma* language directors, (bilingual school) co-ordinators, and language teachers.
- The parents of this group are IT-savvy. By developing **social media management strategies** (especially in Spanish), UK schools can begin to develop an online presence that will appeal to parents, especially if there is some degree of ‘quality reinforcement’ through discussion groups and positive reviews.
- **Agents** will still form the primary entry route for this target market, and so developing/maintaining good relationships with agents will be fundamental to success. Agents spend a great deal on direct advertising and promotion, including using public transport, newspaper advertising, presentations to schools and letter drops. It is therefore important that UK schools keep agents informed through webzines or updates, help agents to promote themselves (for example, by exchanging web links), and provide a first-class client response service. Additionally, invitations to visit the UK school are appreciated and helpful.
- **Group programmes** are popular for this category, with more and more ‘summer camps’ being offered in Spain due both to the economic situation and the increased demands at school for language proficiency. Some UK schools might like to consider teaming up with Spanish providers of such programmes for delivery either in Spain or in the UK.

### 4.2 Attracting category two: 16–19-year-old students

Most category two students will be focusing on entering university, whether in Spain or abroad. Parents will be investing so that their children get the best chance of gaining a university place, quite possibly at a private institution where the entry requirements are higher than average. Students in this category certainly have a major influence on their parents, and more attention will need to be paid to attracting them directly. Strategies for attracting this group (in addition to those mentioned above) include:

- **Special offers** such as “Bring a friend and get a discount!”, “three places for the price of two!”, and so on. This target group is one where personal friendships are important. Even though it will be the parents (the clients) making the final decision, the customer (student) could find this useful for influencing his/her parents.



- **Pre- and post-programme** support through the provision of web-based interaction with peers (other students) and staff of the UK school. Fan pages in *Facebook*, videos on *YouTube* and *Twitter* feeds will all make a positive impression and help develop personal relationships with students.
- **Advisory services** for university and job placement opportunities. The culture shift that has happened in Spain over the past decade means that parents are more willing to allow their children to travel and study independently from an earlier age. Additionally, Spaniards are well aware of the advantages of EU membership, and tend to be pro-European. UK institutions that can provide advisory services for their students, especially those on longer stays, will be attractive to both clients and customers. This is especially true regarding transnational university degrees and the funds/grants available through the EU for such placements.

For higher education EFL centres in the UK, students following *Bachillerato* programmes could well decide to continue their undergraduate studies at the institution housing the EFL centre. This is especially probable where the UK institution can offer programmes that lie somewhat outside the 'standard' undergraduate programme offering at Spanish universities. Spanish universities are governed by the Ministry of Education and have to obtain ministerial approval for any undergraduate programme they offer – thus the range of subjects offered at universities in Spain is far narrower than that offered in the UK.

- In the medium (five years) to long (ten years) term, **this market is likely to increase overall**, although a greater proportion will be investigating countries other than the UK for their studies.
- While the quality of instruction is important, the feeling of '**belonging to a family**' is even more so. Small class sizes and strong relationships between staff and customers/clients are fundamental to success. Regular updates and webzines aimed at both students and parents, personal telephone calls to ex-clients/customers and invitations to (online) events would all be helpful for developing/maintaining relationships, obtaining referrals and improving repeat-buy rates.

Spanish agents report that UK schools tend to be better at communicating than their North American counterparts, but that there is still room for improvement.

### 4.3 Attracting category three: University-level students

This category covers those university (or *Formación Profesional*) students who do not intend to become language teachers (who are considered under category four, below), but rather are seeking a high(er) level of English in order to improve their scores at degree level or are thinking of studying abroad. In some cases, they will be seeking interim/summer job placements in the UK or another European country.

The primary focus of students in this category is on English for Academic Purposes (EAP) or English for Specific Purposes (ESP), although if budget is a major concern they might well opt for 'General English' programmes. The students have a much higher degree of personal influence than previous groups and indeed might make the final buying decision themselves (although parents will probably provide the financial support). The greatest concern will be finding a job, quite possibly outside Spain due to the current economic climate.

In addition to previously mentioned strategies, the following might prove effective:

- This category is highly proficient in web-based technologies and Spaniards are, in general, heavy users of instant messaging, *Twitter*, chat groups and other social media networks. In 2008, Spain came second in Europe after the UK for social media usage<sup>24</sup>. (See: Annexe five – Spanish Networking Sites). Therefore, **social media management** will provide a critical competitive differentiator for UK schools. The most popular network for this category is now *Facebook*, with *Tuenti* also being heavily used.
- Depending on the specialisms offered by the UK school, direct contact with influencers such as **departmental co-ordinators** at universities and *Institutos de Formación Profesional* could prove beneficial. Information on the provision of EAP/ESP programmes is not necessarily easy to find for such influencers (depending on their own levels of English), and the more contact they have on a personal level, the more likely they are to recommend particular schools or programmes. See [www.educaweb.com](http://www.educaweb.com) for a list of subjects covered at *Institutos de Formación Profesional*.

<sup>24</sup> [www.comscore.com/Press\\_Events/Press\\_Releases/2009/2/Social\\_Networking\\_Spain](http://www.comscore.com/Press_Events/Press_Releases/2009/2/Social_Networking_Spain)

- As budgets tend to be tightest for this category, the more information and support that can be provided relating to **EU and Spanish government grants**, the more attractive the service offering will be, even if at the end no grant funding is forthcoming. The very fact that the UK school has taken steps to help the applicant/potential student is valued as an indicator of good customer service.
- This category is also fairly active in **virtual worlds** such as Second Life, and some providers are already taking advantage of this medium to provide online instruction (see for example: <http://languagelab.com/en/>). While this is not Spain-specific, the potential of using virtual worlds for distance-based language teaching/learning is gathering pace, with a growing literature base directed specifically at educators (see for example: Higher Education in Virtual Worlds<sup>25</sup>).

#### 4.4 Attracting category four: (Trainee) teachers of English

Teacher training for English language teachers in Spain is conducted primarily through two routes – either at universities (for graduate teachers) or at institutes of *Formación Profesional* (for Diploma-level teachers). Therefore, two of the strategies outlined above – a) direct personal contact with departmental co-ordinators at universities and institutes, and b) information and support related to grants – are of relevance.

This target group will have a relatively high degree of integrative motivation, and therefore programmes that offer additional benefits (beyond language and methodology) are likely to find favour. Examples include the provision of pre- and post-support via a social network or web page, 'Pecha Kucha'<sup>26</sup> -type presentations on successful classroom practices with space for comments by the peer group, regular emailed updates and 'FAQ's', invitations to events or conferences, and so on.

Additionally, UK schools might wish to consider:

- **A referrals scheme**, whereby past clients/customers are encouraged to recommend a particular UK school or programme to their friends/colleagues.
- **Contacting Spanish public and private schools directly** to offer teacher training and teacher development services. Most schools, but especially those in regional CAs<sup>27</sup> are finding it difficult to recruit and/or develop their staff to the levels required by the new bi/trilingual CLIL curricula and might find it helpful to talk to UK experts and/or undertake either customised or individual staff development programmes.

#### 4.5 Attracting category five: Individual professional and business students

Many of the strategies mentioned above will be applicable to this category as well. However, the added complication is that this is an attractive target group for all kinds of products and services, and finding ways to be 'front of mind' when they take decisions is a major challenge for any provider.

Unlike previous categories, this target group will probably take their own decisions regarding choice of school (perhaps in consultation with their own family), and will organise their own studies. Although fewer in number than previous groups, this is a high-value category, and their expectations will also be high. For this reason, 'traditional' or 'standard' promotional activities will have less of an impact. As with previous groups, personal contact and/or references will matter a great deal.

Some category-specific actions are outlined below:

- **Direct contact with business schools** and private institutes of higher education. The people in this category are highly aware of the need for sound managerial and linguistic development and, generally, the barriers in terms of step one ('Identification of need') are lower than with other groups – their motivation is therefore high, albeit primarily instrumental.

Every business school has its own alumni magazine in which promotional articles or adverts could be included. Additionally, most business schools have a languages department and direct contact with the language co-ordinators could prove beneficial.

Business schools could also be interested in having guest speakers on specialist topics for their undergraduate and postgraduate programmes – this is an excellent way of obtaining qualified leads.

<sup>25</sup> <http://books.emeraldinsight.com/display.asp?K=9781849506090>.

<sup>26</sup> Presentations that last no longer than 20 seconds per slide for a maximum of 20 slides.

<sup>27</sup> Comunidad Autónoma = Autonomous region/community.

- **Social media management:** The favourite social professional network for Spanish professionals is Xing, followed by LinkedIn. By joining (and contributing to) selected groups, UK schools could create a presence in these networks and thereby attract category five students. Additionally, the UK school could create its own group(s) based around the language requirements of specific professions, thus highlighting its expertise.

#### 4.6 Attracting category six: The corporate and multinational markets

Chief/corporate learning officers (CLOs) report a tension between the amount of 'bumph' they receive on the one hand (a surplus of literature they cannot cope with) against a lack of real knowledge and understanding of quality providers on the other. They therefore rely heavily on recommendation, whether from their peers (other CLOs) or established providers. Again, the importance of personal relationships is paramount.

This category tends to be difficult to access directly for most UK schools. Some suggestions are as follows:

- **Establish relationships with quality language providers** in Spain who already have a number of corporate clients on their books, and who are willing to recommend the UK school.
- **Attend** (and present at) **conferences and summits** directed specifically at human resource professionals/CLOs. While relatively expensive, these conferences attract few language-focused providers, and so UK schools that do attend will be seen as being specialists in this market.
- Follow and contribute to **Xing and LinkedIn groups** directed at HR professionals.
- **Invite CLOs** to visit the UK school. In this respect, CLOs should be seen as analogous to agents.
- Ask students from multinational and corporate customers for the name and contact details of their CLOs.
- **Develop an email update or webzine** specifically targeted at CLOs for quarterly distribution.
- Use **chambers of commerce or professional associations** to obtain referrals to CLOs.

## 5 Approaching market segments

In this section, links are provided for accessing agents, influencers, potential clients and customers, as well as associations and funding agencies.

While agents will have some connections to universities, schools and other educational institutions, it is highly likely that there are many gaps, especially at individual co-ordinator/teacher level. A campaign of developing a mailing list and contacting school co-ordinators personally might well prove effective.

Additionally, by researching the potential sources of EU or Spanish government funding/grants, UK schools can find ways to support their marketing strategies, especially where the targeting of specific market segments is involved.

### **ASEPROCE**

An association of around 70 agents in Spain promoting language courses abroad. A useful starting point if searching for a reputable agent/agency.

[www.aseproce.org](http://www.aseproce.org)

### **British Council Spain**

Offers a number of support services for the UK school constituency.

[www.britishcouncil.org/spain](http://www.britishcouncil.org/spain)

### **English UK**

Offers a searchable directory of schools in the UK, as well as accreditation of schools in co-operation with the British Council. In addition, keeps records and statistics relating to members' clientele.

[www.englishuk.com](http://www.englishuk.com)

### **EEOIINET**

*(Note: in Spanish, the plural is represented by double letters)*

Network of Escuelas de Idiomas. From this page, many contact addresses and links to centres in each Comunidad Autónoma can be accessed. Useful for approaching the co-ordinators in each selected centre.

[www.eeoiinet.com/n\\_eeoiinet/index.php?option=com\\_wrapper&Itemid=45](http://www.eeoiinet.com/n_eeoiinet/index.php?option=com_wrapper&Itemid=45)

### **Association of Independent Education Schools in Spain**

Includes over 3,800 primary, secondary, specialist and language schools. Another starting point for getting in contact with schools in specific regions for six to 18-year-olds.

[www.acade.es/acade/CentrosMapa.aspx](http://www.acade.es/acade/CentrosMapa.aspx)

### **Federación Española de Centros de Enseñanza de Idiomas**

A network of private language schools in Spain. These centres have a range of students from six years old through to professionals and executives, depending on the centre. Contact via email: [presidente@fecei.es](mailto:presidente@fecei.es)

[www.fecei.es](http://www.fecei.es)

### **Ministry of Education, Spain – Grants**

Website detailing the grants available from the (central) Spanish government and how to access them.

[www.educacion.es/educacion/becas-y-ayudas/profesores](http://www.educacion.es/educacion/becas-y-ayudas/profesores)

### **Ministry of Education – Links to universities in Spain**

List of links to all the universities in Spain.

[www.educacion.es/educacion/universidades/educacion-superior-universitaria/que-estudiar-donde/universidades-espanolas](http://www.educacion.es/educacion/universidades/educacion-superior-universitaria/que-estudiar-donde/universidades-espanolas)

### **Ministry of Education – Links to centres of Formación Profesional in Spain**

A list of links to the websites of centres of Formación Profesional in each of the Comunidades Autónomas, including online provision.

[www.educacion.es/en/fponline/ccaa/comunidades-autonomas](http://www.educacion.es/en/fponline/ccaa/comunidades-autonomas)

### **Asociación Española de Escuelas de Dirección de Empresas**

An association of business schools, with links to their websites.

[www.aeede.es/que\\_es.htm](http://www.aeede.es/que_es.htm)

### **Asociación Española de Escuelas de Negocios**

Another association of business schools with links to member websites.

[www.aeen.org](http://www.aeen.org)

### **Federación Española de Universidades Populares**

A (rather poorly designed) website about the social universities in Spain. For background information.

[www.feup.org/public\\_html/staticpages/index.php?page=MapaPrincipal](http://www.feup.org/public_html/staticpages/index.php?page=MapaPrincipal)

### **Ecotec – Grundtvig**

Ecotec manages a range of EU-funded programmes in the UK, including Grundtvig, Leonardo and Transversal. A good place to start for assessing the potential for EU funding of specific projects and/or individuals (look for the ‘Quick Guide to Funding Opportunities’, a PDF download).

[www.grundtvig.org.uk](http://www.grundtvig.org.uk)

## 6 Gaps in the market?

In this section, some ideas are presented for consideration for product development. These are *not* meant as recommendations as such, but merely highlight some of the potential gaps that clients and customers have mentioned:

### 6.1 Web-based learning

With the increasing use of the internet, the low costs expected by users (important for those who are unemployed or are students) and the pressure of work/time (professionals and executives), web-based learning is an area where respondents have expressed disappointment. For Spanish speakers, it is difficult to find online providers who provide specialist programmed courses with specific objectives such as:

- taking students through a Bachillerato programme
- preparing Spanish students for Cambridge exams
- business skills such as ‘meeting skills in English’
- preparing for Formación Profesional exams, and so on.

### 6.2 Adventure holidays in English

With the exception of Renaissance period explorers, Spaniards are not famous for being ‘globe-trotters’. Unlike their northern European counterparts, Spanish families have traditionally holidayed at their family villages or on the Spanish coast. This is beginning to change, and young adults now want to explore more of the world. Essentially, classroom-based learning is seen as being boring, something that has to be undergone, much like a visit to the dentist. To a certain extent, this explains the rise in more distant locations from Spain such as Canada and South Africa. ‘Thrills & Spills’ are attractive to 16–25-year-olds but there appears to be little on offer in this particular area.

‘English Plus’ programmes come closest to this concept, but are still (perceived as being) primarily classroom based. At least some element of ‘adventure’ would prove attractive to a number of young adults (although it might create tensions with the parents!).

### 6.3 English for the silver generation:

Strengthened by political interest at EU level in ‘lifelong learning’, a growing number of people (currently around two million per year) attend classes at Universidades Populares, most of which offer language classes.

The over-60s generation is precisely the one that missed out on learning English at school, and these students are keenly aware of the gap in their knowledge.

Programmes that could offer a ‘cultural’ experience as well as a linguistic one (‘pottery in English’) would be attractive to this segment as long as costs could be kept low (for example, by using low-cost airlines into regional airports). Funding for such programmes might also be found through the EU’s Grundtvik programme.

## 7 Concluding remarks

The market in Spain has long provided a major and steady income stream for ELT providers, both in Spain and the UK. While in the short term (one to five years), the market will continue fairly strongly, especially for 16–19-year-olds and teacher trainees, other market segments will probably see a slow but accelerating decline.

In part, this is due to economic factors; more importantly, the provision of ELT within the public and private school sector will continue to improve and spread, reducing the need for supplementary studies.

In the past decade, Spaniards have become much more selective about their choices, and cultural shifts indicate that they are more likely to make informed decisions at an earlier age.

Spain has therefore become and will continue to develop as a sophisticated market, requiring more targeted marketing strategies and techniques on the part of UK schools. In effect, this means tackling market segments at an earlier stage.

In almost every case in section four, above, mention has been made of social media management, and this is one area where there are major gaps:

- A trawl of Facebook pages using ‘English Language’ provides over 500 references, and yet only a handful (fewer than 20) belong to UK schools providing a support service to their customers.
- The English Language Service Professionals group on LinkedIn is small, with just over 2,500 members worldwide. UK-based professionals form a small subset of this group.
- The British Council has a presence on both the adult and junior grids in Second Life, but there appear to be no high quality UK-based schools using this platform.
- There are fewer than 1,000 profiles on Twellow (the Twitter directory) that mention ‘English Language Teaching’. Again, UK-based professionals form a small subset of this group.

To summarise, there is a clear need for UK schools to make their presence felt in the social media if they wish to develop a strong marketing/brand presence and maintain a sustainable flow of Spanish students to the UK in the mid to long term.

UK schools that develop more personalised marketing strategies now will reinforce their brands and are more likely to have a competitive edge in the future at a lower initial cost.

Jan Kingsley  
Executive Director, ASPEL

# Sources and references

The following are some of the sources and references used in this report. The link will take you to the relevant website/web page.

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[www.englishuk.com/en](http://www.englishuk.com/en)
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[www.nabss.org/](http://www.nabss.org/)
- Escuelas Oficiales de Idiomas – EOI [www.eeooiinet.com/n\\_eeooiinet/index.php](http://www.eeooiinet.com/n_eeooiinet/index.php) and EOI Teachers' website <http://federacion.eeooiinet.com/>
- British Council – Spanish Ministry of Education Bilingual Schools Project  
[www.britishcouncil.org/spain-education-bilingual-project.htm](http://www.britishcouncil.org/spain-education-bilingual-project.htm)
- European Association for the Education of Adults – EAEA  
[www.eaea.org/](http://www.eaea.org/)
- Federación Española de Universidades Populares – FEUP  
[www.feup.org/public\\_html/UPs.php?mode=buscarTexto](http://www.feup.org/public_html/UPs.php?mode=buscarTexto)



# Glossary of acronyms

CA	Comunidad Autónoma
CINE	Clasificación Internacional Normalizada de la Educación – The EU's classification system for levels of education
CLIL	Content and Language-integrated Learning
EAP	English for Academic Purposes
EFP	Escuela de Formación Profesional (see below)
ESP	English for Specific Purposes
EHEA	European Higher Education Area
EOI	Escuela Oficial de Idiomas (see below)
ESO	Educación Secundaria Obligatoria – compulsory education
FAQ	Frequently asked question
GDP	Gross Domestic Product
IMF	International Monetary Fund

# Glossary of ‘special’ educational institutions in Spain

## Escuela Oficial de Idiomas

A network of schools specialising in the teaching of languages, established by the Spanish Government to improve Spaniards’ access to the rest of the world, especially the EU. Each centre reports to the Autonomous Community Education Department, and is staffed by full and part-time specialists, usually non-native-speaker teachers. EOI teachers may obtain the necessary qualifications by passing exams at Centros de Formación Profesional, i.e. they do not need to obtain university degrees to teach foreign languages at EOIs. Throughout Spain, there are 302 such centres teaching 384,000 students (2008–2009). Of these, 160 belong to the EE00II network.

## Escuela de Formación Profesional

Best translated as ‘technical/vocational college’, these provide a route to post-secondary technical occupations, mostly in subjects such as mechanics, beauty care, the building trades, and so on. However, languages can be important (depending on the specific college), and foreign language teachers can obtain the necessary qualifications at EFPs to work in both the private and public sectors. In 2008–2009, nearly 500,000 students attended courses in EFPs.

## Universidad Popular

Due to a range of historical political and economic factors, the percentage of the population over 55 who successfully completed secondary school is a mere 29 per cent (contrasting to the age range 25–34, of whom 65 per cent have completed secondary school)<sup>28</sup>.

In the past decade, the Spanish educational authorities have placed greater priority on providing support for these older learners. The Universidades Populares (best translated as ‘social universities’) provide lifelong learning opportunities. Their focus is on helping adults to obtain secondary school diplomas, develop social networks and learn new skills or hobbies. UPs provide the equivalent of ‘evening classes’ in the UK, and can be established by any local/social community. In other words, the primary goal is to help people from this age group (especially women, who traditionally tended to the home) to better integrate into a rapidly-changing society.

This kind of initiative is of great interest to the EU, and may often be funded through the Grundtvik programme. Some two million adults attend classes at UPs annually<sup>29</sup>.

<sup>28</sup> Spanish Ministry of Education report

<sup>29</sup> Federación Española de Universidades Populares

# Annexe one – The Spanish education system (simplified)

Higher Education	University Studies	Doctorate	
		Masters Degree	
		Degree ('grado')	
Academic stream (inc. distance)	Bachiller	Bachillerato	2nd year
			1st year
'Professional' / Technical stream (inc. distance)	Language Teaching Diplomas	Advanced level	
		Intermediate level	
		Basic level	
	Higher Professional Diplomas		
	Tecnico	Formación Profesional Technical College	
Obligatory & free education	ESO	Educación Secundaria Obligatoria 12-16 years	4th year
Formative assessment			3rd year
			2nd year
			1st year
		Primary 6-12 years	6th year
			5th year
			4th year
			3rd year
			2nd year
			1st year
Lifelong Learning (non-academic)	Escuela Oficial de Idiomas		
	Universidad Popular		
Infant	Second year (3-6 years)		
	First year (0-3 years)		

# Annexe two – Key statistics and data for education and English

Note: these statistics are extracted primarily from the Spanish Ministry of Education’s Report 2009–2010.

## 1 Autonomous Communities

A total of 87 per cent of the non-higher education budget is redistributed to the Autonomous Communities (CAs – Comunidades Autónomas). Each CA may decide on and implement its own policy/strategy with regard to language education.

The list of CAs, along with the number of students for which each is responsible, is as follows:

Comunidad Autónoma (Totals)	Primary students 2.66 million (thousands)	Secondary students 1.81 million (thousands)	Bachillerato Students 629,000 (thousands)	Formacion Profesional 489,000 (thousands)
Andalucia	538	385	124	95
Aragon	71	47	16	14
Asturias	44	32	13	11
Baleares	63	40	12	8
Canarias	126	87	33	25
Cantabria	28	20	8	7
Castilla y Leon	123	89	38	26
Castilla – La Mancha	128	89	29	19
Catalunya	424	274	87	85
(Comunitat de) Valencia	282	191	59	54
Extremadura	66	51	17	11
Galicia	126	92	38	33
(Comunidad de) Madrid	363	236	92	51
(Region de) Murcia	100	65	20	14
(Comunidad Foral de) Navarra	37	23	8	6
Pais Vasco	110	69	30	26
(La) Rioja	17	11	4	4
Ceuta (North Africa)	6	4	1	1
Melilla (North Africa)	6	4	1	1

There are certain figures of interest here:

- Andalucia has more students than any other CA of Spain and receives the lion’s share of devolved educational budgets. However, only a minority of UK schools appear to target this region in their marketing strategies.
- The Canary Islands has nearly as many students as Galicia (a much larger region geographically), and is a tourist centre where English is of prime economic importance. How many UK schools target this CA?
- Those enrolled in Formación profesional are key targets for specialised language courses. Andalucia, Catalunya and Valencia have substantially more people enrolled in these types of courses than Madrid. See paragraph two, below.

## 2 Formación Profesional

Schools offering the following courses are equivalent to 'technical/vocational colleges'. Most of the programmes are subsidised at least to some extent by the Comunidad Autónoma. Students graduate with a 'Título', enabling them to practice their chosen profession up to and including middle-management level.

Formación Profesional course/programme	Numbers (thousands)
Agriculture	4.2
Sports and Physical Pastimes	4.1
Fishing and Maritime Activities	1.2
Management and Administration	47.4
Graphic Arts	2.5
Commerce and Marketing	10.6
Communication, Image and Sound	2.6
Building and Civil Engineering	0.7
Electronics	29.5
Production Processes	20
Hospitality and Tourism	11.8
Personal Image (hairdressing, make-up, etc.)	16.4
Food Production and Distribution	0.9
Information Technology	17.8
Furniture and Woodcrafts	2.6
Motor Mechanics	21.6
Chemistry	2.4
Health Sciences	32.7
Social and Community services	6.7
Textile, Fashion and Ceramics	4.1

Of special interest to UK language schools are those subjects where English (for Specific Purposes) is directly relevant; for example, Management and Administration, Information Technology, Hospitality and Tourism, Commerce and Marketing, and Health Sciences.

## 3 Higher and further education

The percentage of the 25–34-year-old population that has successfully completed tertiary education in Spain (38.8 per cent) is slightly higher than that of the UK (36.6 per cent), and compares favourably to the 27-country EU average of 31 per cent.

While students can attend public universities for free, the private university sector has seen major growth in the past decade. In part, this has been a result of the worsening economic climate in Spain, and the realisation that opportunities lie beyond Spanish borders or with multinationals. Private universities tend to have better results in terms of placing students into the workforce.

## 4 Continuing education/lifelong learning

Continuing (adult) education or lifelong learning (LLL) shows a clear upward trend. In 1998, only 4.2 per cent of the 25–64-year-old population was involved in LLL. Ten years later, in 2008, over ten per cent of the adult population was following some kind of continuing education. This compares to the average across Europe of nine per cent. Spain is fourth behind Finland (23 per cent), the UK (20 per cent) and Holland (17 per cent). Again, many of those involved in LLL will be learning English.

## 5 Investment in education

Since 2001, government investment in education has increased from 4.26 per cent of GDP to 4.93 per cent of GDP, reaching 51.8 billion Euros in 2009. This reflects a rise of 52 per cent since 1999, while the school population has risen only 2.2 per cent. This is indicative of the priority that Spain has put on its education system, driven by its strategic goals of European integration and alignment.

### **Grants and awards:**

The increase in investment in foreign languages (mostly English) has been extraordinary. Apart from the general increased investment in education, specific grants and awards to study foreign languages increased from €5.2 million in 2001 to over €73 million in 2007–2008. In 2001, 4,337 students benefited from such grants and government awards. In 2008–2009, this number increased to over 47,000 (a number that is comparable to the total number of Spanish students attending English courses in the UK).

These figures exclude EU-funded programmes such as Erasmus, Comenius, Grundtvik and Leonardo da Vinci.

Spanish Government grant breakdown:

Type of grant	# of beneficiaries	Total amount allocated (€)	Average grant per person (€)
English language courses abroad for teachers and trainee teachers	2,500	5.2 million	2,100
Immersion courses in English abroad for undergraduates	18,000	18 million	1,000
Immersion courses in English abroad for 18–20-year-olds	25,000	42.5 million	1,700
Immersion courses in French and German abroad for (under)graduates	1,400	2.4 million	1,700
Immersion courses in French for secondary school students	450	629,000	1,398

### **Teachers and language assistants:**

The teacher–student ratio in Spain is now one teacher to 14 students at primary level, compared to the UK’s one teacher to 19 students. The equivalent ratios at secondary level are: Spain: one teacher to 12 students; UK: one teacher to 17 students. In terms of native-speaker language assistants in schools, the numbers continue to grow. From a base of 400 language assistants in 2001, there were 2,882 native-speaker language assistants in 2009–2010 (500 more than in 2008–2009). Over 1,200 of these were from the United States/Canada, funded by a Spanish government programme, with 570 from the UK. See: [www.mec.es/sgci/usa/en/programs/us\\_assistants/default.shtml](http://www.mec.es/sgci/usa/en/programs/us_assistants/default.shtml)

### **Information Technology:**

Another area of strong investment has been in the provision of IT support to schools. In fact, the number of children per computer in public schools (4.6) is far better than in the private sector (9.4 children per computer). 99.5 per cent of public schools have high-speed internet access. This underlines the efforts being made to ensure that the Spanish population is ‘IT-savvy’.

In 2008, over 80 per cent of under-15-year-olds were internet users, whether at home (62 per cent) or at school (48 per cent).

## 6 Number of educational institutions in Spain

The Ministry of Education divides schools into three funding categories:

- 1 Public schools, which are funded totally by the state. In all, there were over 18,000 of these in 2008 throughout Spain.
- 2 ‘Escuelas Concertadas’, which are schools run by private or religious groups and which receive at least some state funding.
- 3 Privately or client-funded schools, which are authorised to provide state-recognised tuition.

Both ‘Escuelas Concertadas’ and private schools together accounted for 7,944 schools.

## 7 Number of non-university students in Spain 2009–2010:

All students undertaking non-university education, in both private and public schools	7.6 million
Students undertaking vocational education (Formación Profesional)	585,000
Students undertaking post-compulsory secondary education (Bachillerato)	637,000
Students in Compulsory Education (ESO)	1.8 million
Primary school students (Educación primaria):	2.7 million
Pre-school students (Educación infantil)	1.8 million

In all cases except for ESO, which remained steady, there was an increase in the numbers of students over 2008–2009. The highest increase was in Pre-school numbers, with an additional 63,551 students entering *Educación infantil*. Rather than an increased birth-rate, the rise is due primarily to increased immigration (see below).

Distance education is becoming increasingly important, with a two per cent increase over 2008–2009 at *Bachillerato* level (43,614 students in 2009–2010) and a 15 per cent increase at *Formación Profesional* level (18,656 in 2009–2010).

## 8 ‘Specialist’ and private schools

Spain is the only European country to offer language tuition and accompanying examinations for free to anyone who wishes to learn. These services are offered through the *Escuelas Oficiales de Idiomas*, each governed by its Autonomous Community.

Spain officially recognises a number of privately/client-funded specialist schools. These offer a range of curricula, very often to supplement standard schooling. Of the total of 727,497 students attending such schools, no fewer than 384,607, or 53 per cent, were undertaking language tuition (mostly English).

In addition, there are many (figures unavailable) private schools that are not ‘officially recognised’ but provide supplementary tuition, primarily to help students pass official state exams. Of great importance here are the ‘oposiciones’, which enable successful candidates to enter the public service sector.

## 9 Foreign languages

From Primary stage onwards, students undertake foreign language learning. Of these, over 95 per cent (7.2 million) take English as their primary ‘foreign’ language (NB: their second language might be Castilian). Less than 1.5 per cent of students undertake a second ‘foreign’ language (usually either French or German).

## 10 Foreign students

Numbers of non-Spanish students in Spanish schools have increased dramatically, from 80,587 in 1998–1999 to over 744,000 (ten per cent of the student population) last year. However, such foreign students are generally fully integrated into the Spanish education system, and little is done to help them adapt to it. The biggest majority (over 40 per cent) of immigrant children are from Latin America, with European immigrants (29 per cent) and African immigrants (21 per cent) forming the bulk of the rest.

# Annexe three – Government education authorities address list

## **Spain – Ministerio de Educacion**

Calle Alcala 34, 28014 Madrid

[www.educacion.es](http://www.educacion.es)

## **Andalucia**

Consejeria de Educacion, Avda. Juan Antonio de Vizarron, Edificio Torretriana – Isla de la Cartuja, 41092 Sevilla

[www.juntadeandalucia.es/educacion](http://www.juntadeandalucia.es/educacion)

## **Aragon**

Departamento de Educacion, Cultura y Deporte, Avd. De Gomez Laguna 25, 50009 Zaragoza

[www.aragon.es](http://www.aragon.es)

## **(Principado de) Asturias**

Consejeria de Educacion y Ciencia, Pza. De Espana 5, 33007 Oviedo

[www.educastur.es](http://www.educastur.es)

## **(Illes) Balears**

Conselleria d'Educacio I Cultura, Carrer d'Alfons el Magnanim 29, 07004 Palma de Mallorca

[www.caib.es](http://www.caib.es)

## **(Islas) Canarias**

Consejeria de Educacion, Universidades, Cultura y Deportes, Avda. Buenos Aires 3-5,

Edificio Tres de Mayo, 38071 Santa Cruz de Tenerife

[www.gobiernodecanarias.org/educacion](http://www.gobiernodecanarias.org/educacion)

## **Cantabria**

Consejeria de Educacion Calle Vargas 53 39010 Santander

[www.educantabria.es](http://www.educantabria.es)

## **Castilla-La Mancha**

Consejeria de Educacion y Ciencia, Bulevar del Rio Alberche, 45071 Toledo

[www.educa.jccm.es](http://www.educa.jccm.es)

## **Castilla y Leon**

Consejeria de Educacion, Monasterio de Ntra. Sra. De Prado, 47071 Valladolid

[www.jcyl.es](http://www.jcyl.es)



## **Catalunya**

Departament d'Educacio, Via Augusta 202, 08021 Barcelona  
[www.gencat.cat/educacio](http://www.gencat.cat/educacio)

## **Comunitat Valenciana**

Conselleria d'Educacio, Avda. Campanar 32, 46015 Valencia  
[www.edu.gva.es](http://www.edu.gva.es)

## **Extremadura**

Consejeria de Educacion, Calle Santa Julia 5, 06800 Merida  
[www.juntaex.es](http://www.juntaex.es)

## **Galicia**

Conselleria de Educacion e Ordenacion Universitaria, Edif. Administrativo San Caetano, 15781 Santiago de Compostela  
[www.edu.xunta.es](http://www.edu.xunta.es)

## **(Comunidad de) Madrid**

Consejeria de Educacion, Calle Alcala 32, 28014 Madrid  
[www.madrid.org](http://www.madrid.org)

## **(Region de) Murcia**

Consejeria de Educacion, Formacion y Empleo, Avda de la Fama 15 – Edificio Administrativo Educacion, 30006 Murcia  
[www.carm.es/educacion](http://www.carm.es/educacion)

## **(Comunidad Floral de) Navarra**

Calle Santo Domingo, 31001 Pamplona  
[www.pnte.cfnavarra.es](http://www.pnte.cfnavarra.es)

## **Pais Vasco**

Departamento de Educacion, Universidades e Investigacion, Calle Donostia-San Sebastian 1, 01010 Vitoria-Gasteiz  
[www.hezkuntza.ejgv.euskadi.net](http://www.hezkuntza.ejgv.euskadi.net)

## **(La) Rioja**

Consejeria de Educacion, Cultura y Deporte, Calle Marques de Murrieta 76, 26071 Logrono  
[www.educarioja.org](http://www.educarioja.org)

# Annexe four – Example providers of web-based English

***Home English:***

[www.curso-ingles.com](http://www.curso-ingles.com)

***Kaplan International:***

[www.mansioningles.com/nuevocurso.htm](http://www.mansioningles.com/nuevocurso.htm)

***OM International:***

[www.ompersonal.com.ar](http://www.ompersonal.com.ar)

***EF Englishtown:***

[www.englishtown.es/online/home.aspx](http://www.englishtown.es/online/home.aspx)

***British Council:***

[www.britishcouncil.org/learnenglish](http://www.britishcouncil.org/learnenglish)

[www.britishcouncil.org/learnenglishkids](http://www.britishcouncil.org/learnenglishkids)

## Annexe five – Spanish networking sites

A selection of leading social networking sites ranked by total Spanish unique visitors ('000s)

NB: although somewhat out of date, this demonstrates the rapid growth of social networking in Spain

	Dec 2007	Dec 2008	Per cent change
Total Spanish internet audience	14,906	17,893	20 per cent
Social networking	9,367	13,185	41 per cent
Tuenti.com	649	5,644	770 per cent
Facebook.com	346	4,316	1,147 per cent
Fotolog.com	3,141	3,351	7% per cent
Hi5.com	738	1,997	170 per cent
Metroflog.com	1,572	1,937	23 per cent
Sonico.com	N/A	1,629	N/A
MySpace Sites	N/A	1,462	N/A
Badoo.com	883	1,249	41 per cent
Netlog.com	299	339	13 per cent
Skyrock	236	289	22 per cent

Source: comScore World Metrix, February 2009

