

Global English Language Report

A **YouGov** assessment of the benefits of speaking English and the demand for English language learning around the world





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Foreword



By James Mundell
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English today is the dominant language of global business and politics and the *lingua franca* of the global workforce. Driven initially by the force of British Empire building, English usage was subsequently fuelled by the rise of the USA as the dominant economic superpower during the 20th Century. In the past two decades this trend accelerated thanks to the globalization of the world economy and connectivity facilitated by the World Wide Web.

In coming years the uptake of English will be shaped by four underlying trends that are almost certain to consolidate the position of English as the number one global language.

Population growth

The 2017 revision of The UN's 'World Population Prospects' estimated that over the next 30 years the global population will grow by around 83 million every year, with the current population of 7.6 billion people reaching 8.6 billion by 2030 and 9.8 billion in 2050. Today there are already as many as 1.5 billion people who can speak a reasonable level of English across the globe, rendering it the communication glue for global citizens of commerce, travel, entertainment and learning. Population growth alone will add hundreds of millions to the number of people who want to learn English in order to feel fully part of the global economy.

Urbanization and the growth of the middle class

Global population growth will be accompanied by two related trends which have significance for the future uptake of English. The UN publication on 'World Urbanization Prospects' forecasts that the current 55% of the world's population living in urban areas will increase to 68% by 2050, mostly driven by population shifts in Asia and Africa. Urban dwellers tend to have better paid jobs in industries more connected to the global economy and so enter the 'middle classes'. Research by The Brookings Institution in 2017 reported that '*at a global level we are witnessing the most rapid expansion of the global middle class the world has ever seen*', and that by 2020 the middle class will represent the majority of the world's population for the first time ever. Middle class people tend to have stronger ambitions to get on in the world and, in a world where English facilitates access to better-paid job opportunities, this trend can only fuel the demand for English learning.

Global mobility and protectionism

A 2018 survey conducted by Boston Consulting Group amongst 366,000 workers in 197 countries indicated that the desire of workers to move abroad for work was actually on the decline. This decline may be the natural consequence of the protectionist and populist tendencies currently at play in the western world as represented by the Trump presidency in the USA, Brexit in the UK and the increasing popularity of more nationalist-leaning politicians across much of Europe. Nevertheless, more than 70% of workers in large developing nations such as Brazil, India and most of Africa would be willing to look for work abroad, with London and

New York being the two most popular cities. Even if this desire to look towards the English-speaking world for career opportunities is more difficult to fulfil due to unfriendly migration policies in the west, there remains a growing trend within businesses to establish remote teams of global talent to manage both projects and learning, presenting more reasons for workers to develop a good working knowledge of English.

Accelerating connectivity

Over half of the world's population had access to the internet by the end of 2017 and this will probably exceed 60% by 2025. With Internet penetration reaching saturation point in developed countries, most of this growth in connectivity will come from the developing nations of Asia and Africa. This trend goes hand in hand with the rise of the smartphone, now owned by over 3 billion globally and accounting for over 80% of access to the internet, bringing increasing numbers of people into contact with global business, cultural and knowledge communities where English is already the dominant language. Increasingly smart apps and innovative mobile technology present more opportunities for mobile learning, the gamification of English learning, and the ability to create and share content with teachers and fellow students alike.

It has been estimated that the global value of the adult English language training market was in excess of US\$34 billion in 2017 and it is forecast to grow by more than 80% over the next 5 years. This report examines the ongoing global demand for English language learning amongst the global labor market and the motivations, benefits and methods of learning English.

1

The Survey

YouGov interviewed a sample of 500 workers / students aged 18-50 in each of eight markets across Europe, Asia and the Americas.

The research was conducted online in all markets and fieldwork took place between 10th-20th August 2018.

Across the eight markets, the survey included people with a wide range of English proficiencies, from complete non-speakers of English, through to Beginners, Intermediate and Advanced speakers, self-defined as follows:

- **Advanced**
Like a native speaker OR you are confident discussing most subjects
- **Intermediate**
You can have a basic conversation on everyday subjects
- **Beginner**
You know a few words and phrases
- **Non-Speaker**
Do not speak English at all

The level of English proficiency varied considerably by market with Germany having by far the highest proportion of Advanced English speakers at 44% and Japan the lowest at 10%. Japan also had the highest number of complete non-speakers at 57%.

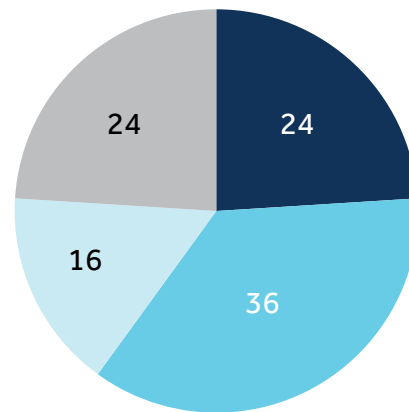
Countries covered by the research



Germany, Italy, Russia, India, Indonesia, China, Japan and Chile

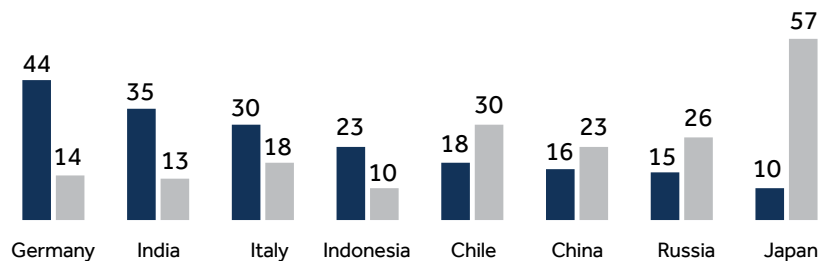
Level of English proficiency (%)

■ Non-Speaker ■ Beginner ■ Intermediate ■ Advanced



Level of English proficiency by market (%)

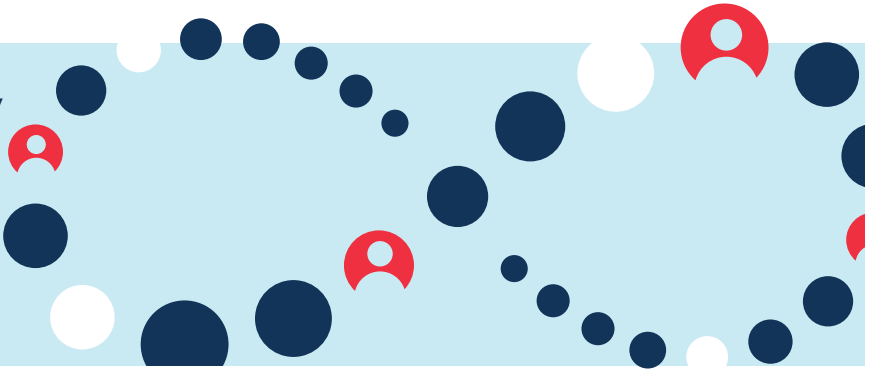
■ Advanced ■ Non-speaker



2

Key Facts

There is a growing, continually refreshing pool of 1.4 billion potential English learners around the world



2x

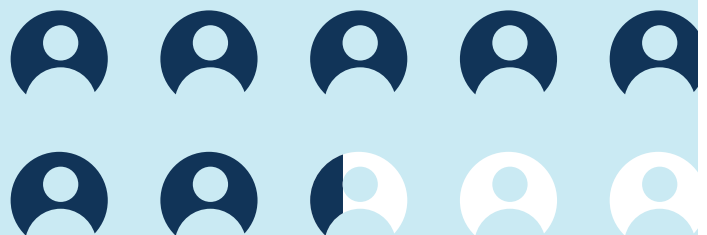
Advanced English speakers are twice as positive about their career prospects as non-speakers

Half of English speakers believe that they earn more money and receive an average income boost of 25% due to their English language skills



English speakers are happier both in work and with life in general than non-speakers. The higher the proficiency of English, the higher the level of happiness

73% of people believe that English will become more important over the next 5 years, whilst only 4% believe that it will become less important



3

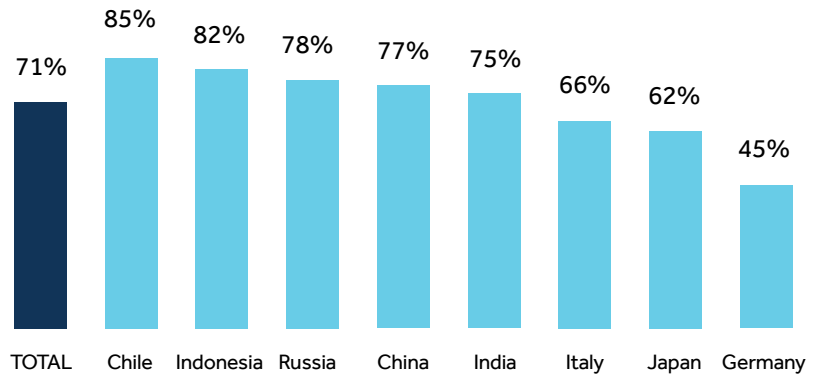
The Global Demand for English Learning

How many people are currently learning or intending to learn English and what might be the size of demand for English language courses over the next 5 years?

Current engagement with English

With English already having established itself as the de facto language of global communications, it is not surprising that the overall level of engagement with the English language (however informal) is already very high. No fewer than 7 in 10 of the global workforce are already learning English or intend to learn. In Germany, which already has the highest proportion of Advanced English speakers, there is much less engagement in learning English than in the developing world, where the ambitions of the burgeoning middle classes are fuelling demand. The top graph opposite highlights the working and studying populations across the globe who are strongly pre-disposed to learning or improving their English language skills.

Currently learning or intending to learn English



50%
Very/quite likely to take English Language course in next 5 years

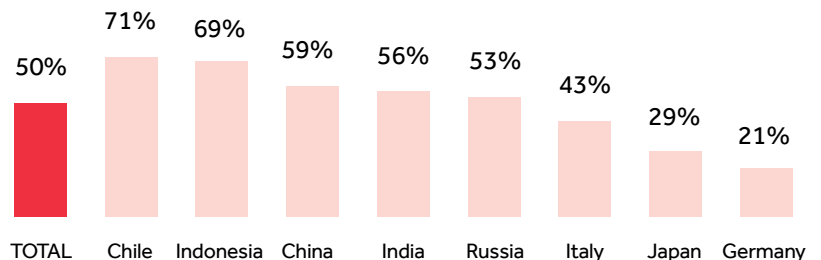


Intention to take an English language course

When asked specifically about their intention to take an English Language course over the next 5 years, 50% of people said that they were very likely or quite likely to do so.

By country, the level of intent to take an English course largely mirrors the level of current engagement with English shown above, with as many as 71% of Chileans intending to take one and as few as 21% of Germans planning to do the same.

Very / quite likely to take an English course in next 5 years



3 | The Global Demand for English Learning

This level of intent to take English courses represents an enormous opportunity for English course providers over the next few years. This survey covered the working / student population in each country, excluding

the lowest earning 25% of workers in the developing markets of China, India, Indonesia and Chile. World Bank estimates from November 2017 of the size of the labor force in each country (minus the low earners

in developing markets) is shown in the table below, along with their propensity to take an English language course. This allows us to estimate the number of potential learners in the final column.



Country	Size of labor force (adjusted)	Very/quite likely to take English course in next 5 yrs	Potential size of customer base in next 5 yrs
China	590,000,000	59%	348,100,000
India	390,145,000	56%	218,481,000
Indonesia	95,332,000	69%	65,779,000
Russia	75,638,000	53%	40,088,000
Japan	66,503,000	29%	19,285,000
Germany	43,473,000	21%	9,129,000
Italy	25,458,000	43%	10,946,000
Chile	6,722,000	71%	6,363,000
Total	1,293,271,000		718,171,000

1.4 billion people open to taking an English language course

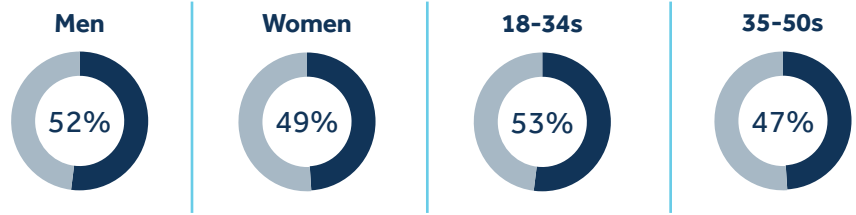
In these eight markets alone there will be as many as 718 million people open to taking an English language course over the next 5 years. These countries represent approximately 50% of the global non-English speaking labor force. Therefore, if the findings above are broadly representative of the rest of the world, the global pool of potential course takers may be as big as 1.4 billion people.

With the global population predicted to grow by a further 1 billion people by 2030 this figure can only grow. The pool of potential learners will also continually refresh as youthful populations reach adulthood, enter the workforce and look for ways to improve their prospects in life.



3 | The Global Demand for English Learning

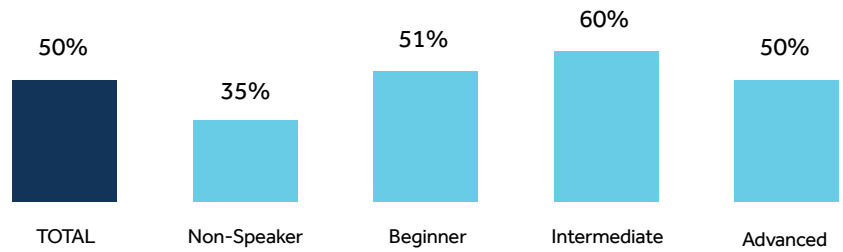
The opportunity is high amongst all ages and genders. Globally there is a slightly higher interest amongst men and the under 35s, but interest remains very high amongst women and over 35s.



The picture in Russia and Italy is slightly different from the rest of the world in that in both countries women tend to be more likely to take a course than men, and under 35s are significantly more likely to take a course than over 35s.

It is not the case that non-speakers of English are the most interested in taking an English language course. In fact this group are the least interested, and interest is much higher amongst people who already have some English speaking amongst those who consider themselves to be at an intermediate level.

Very / quite likely to take an English course in the next 5 years



4

The Motivations for Learning English

Why do people around the world want to learn English, and what are the barriers to learning?

The tendency for workers and students around the world to aspire towards cities such as London and New York as potential places to work is undoubtedly strong. However, the stated reasons for wanting to learn English are as much about personal development as they are about career prospects, the top three being:

- ➔ Personal development
- ➔ To make travelling more enjoyable
- ➔ To boost earning potential

These reasons are the same regardless of whether people already have some English or not.

What motivated current English speakers to start learning?

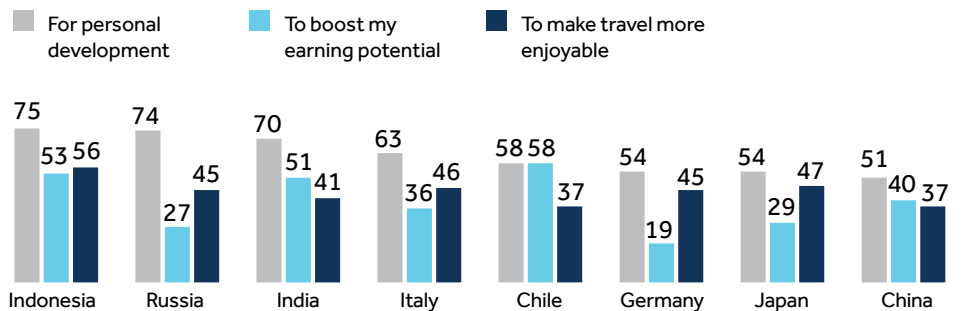
Overall, almost two-thirds of English-speakers agreed that one of their motivations for wanting to learn was simply personal development, placing this motivation well ahead of both making travel more enjoyable and boosting earning potential. Wanting to be able to watch English language TV and follow English songs were also motivations for substantial minorities suggesting that a general desire to feel part of the global community is a fundamental attraction of learning English.

Across all eight markets surveyed, 'Personal Development' was the most commonly cited reason for starting to learn English. However, the motivation to enhance the experience of travelling abroad is also potent in all markets. The global travel industry is one of the

What motivated you to start learning English?

What motivated you to start learning English?	Total
For personal development	63%
To make travelling abroad more enjoyable	45%
To boost my earning potential	40%
To be able to understand and sing along to English songs	32%
To get a job I am more passionate about	31%
To be able to watch English-language TV programmes without subtitles	31%
To be able to move to another country for work	26%
To be able to study in another country	21%
No real motivation - I grew up learning English / had to learn it at school	18%
To impress a prospective partner	10%
To be able to communicate with children or grandchildren	9%

What motivated you to start learning English? (%)



largest and fastest growing sectors of the global economy, driven largely by the increasing numbers of people in developing markets such as China, India and Indonesia who find themselves able to afford to travel abroad for the first time. The USA has been one of the major beneficiaries of this growing pool of travellers with annual arrivals into the country increasing by 38% from 55 million to 76 million over the past 20 years. With the combined populations of China, India and Indonesia totalling almost 3 billion people, the potential size of the opportunity for teaching English for travel purposes is clear. When comparing the motivation for

learning English to increase earnings with the idea of doing so to make travel more enjoyable, three markets - India, Chile and China - ranked boosting income as a bigger influence. In the rest of the markets, learning English to improve travel experiences came out as a more potent motivator. In Germany in particular, increased earnings is a relatively weak motivator, and quite some way behind the wish to be able to follow English popular culture on TV and through music. Germans were also much more likely than any other nation to say they did not have any real motivation, as it was simply a requirement to learn English at school.

4 | The Motivations for Learning English

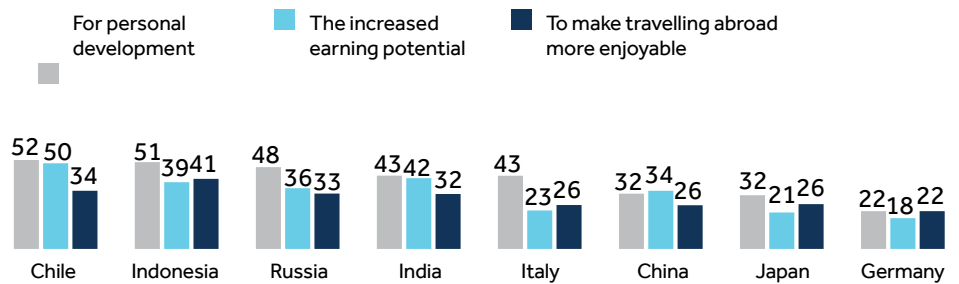
What would motivate non-English speakers to learn?

Factors that might motivate people to learn English in the future are similar to what has motivated people in the past. Particular motivations for non-speakers, such as having more time to learn or English courses being less expensive, are still somewhat less influential than personal development, earnings and enhancing travel experiences.

Like those who have already learnt English, non-English speakers also appreciate the opportunity for personal development. This is the case in every market with the exception of China, where improving earnings potential is a slightly more motivating factor. The increased earning potential is also relatively more attractive to Chileans and Indians than it is to Germans, Italians and Japanese for whom enhancing the travel experience is more of a motivation.

What would motivate you to start learning English?	Total
For personal development	39%
The increased earning potential	32%
To make travelling abroad more enjoyable	29%
The prospect of getting a job I'm more passionate about	22%
To understand English-language TV shows, films or music	20%
If I had more time to learn	18%
To move to another country for work	18%
The opportunity to study in an English-speaking country	15%
If English language courses were cheaper	14%
If I had to learn it as part of a course or at school	8%
To be able to communicate with children or grandchildren	8%
If it would impress a prospective partner	5%

What would motivate you to start learning English? (%)



4 | The Motivations for Learning English



What is stopping people from learning English?

It has been suggested that it might take anything from 400 to 2,000 hours of learning, or several years, to achieve an intermediate level of English. This is something non-English speakers seem to be acutely aware of, with the primary barrier to learning English being the perceived intensive time commitment. Over one-third of non-speakers across markets cited this as a barrier, indicating that providers need to consider the efficiency in the learning process that they offer.

Beyond the time commitment the main barriers are a combination of expense, lack of confidence and a general lack of motivation:

- ➔ Lack of time 36%
- ➔ Too expensive 31%
- ➔ Lack of confidence 29%
- ➔ Lack of motivation 24%

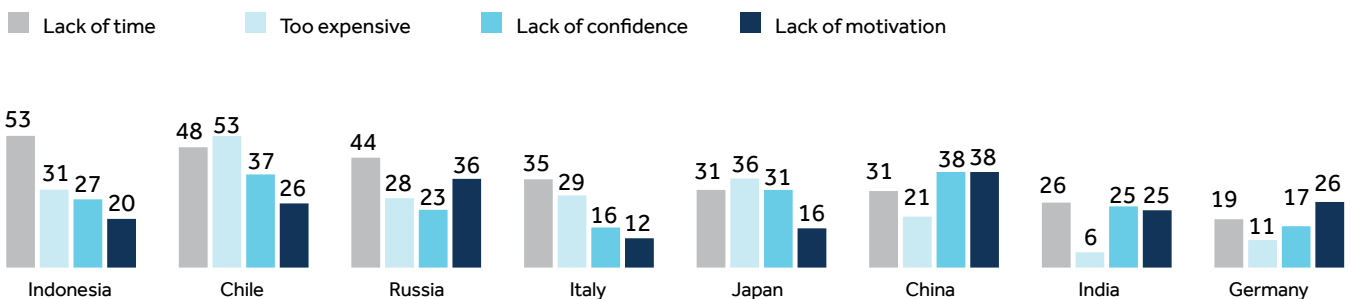
For the Chinese, the main barriers are confidence and motivation. Although the Japanese have less of a motivational issue, they too lack some confidence to start learning. The confidence challenge in these markets is no doubt exacerbated by the requirement to learn a new script in addition to the words and grammar.

Although lack of time is clearly the greatest barrier in Indonesia, Russia, and to some extent, Italy, it is not the main barrier in every country. Perceptions of English learning being

too expensive is a bigger barrier in Chile and Japan, whilst expense is the least of these four issues in China, Germany and India.

Time, expense, motivation and confidence are all substantial barriers to learning English that need to be overcome to some degree in every country. However, we see in the next section the benefits of accruing some knowledge of the English language can be substantial, both personally and professionally, and reinforces why English learning is worth the investment of time, money and effort.

Barriers to learning English (%)



5

The Benefits of Learning English

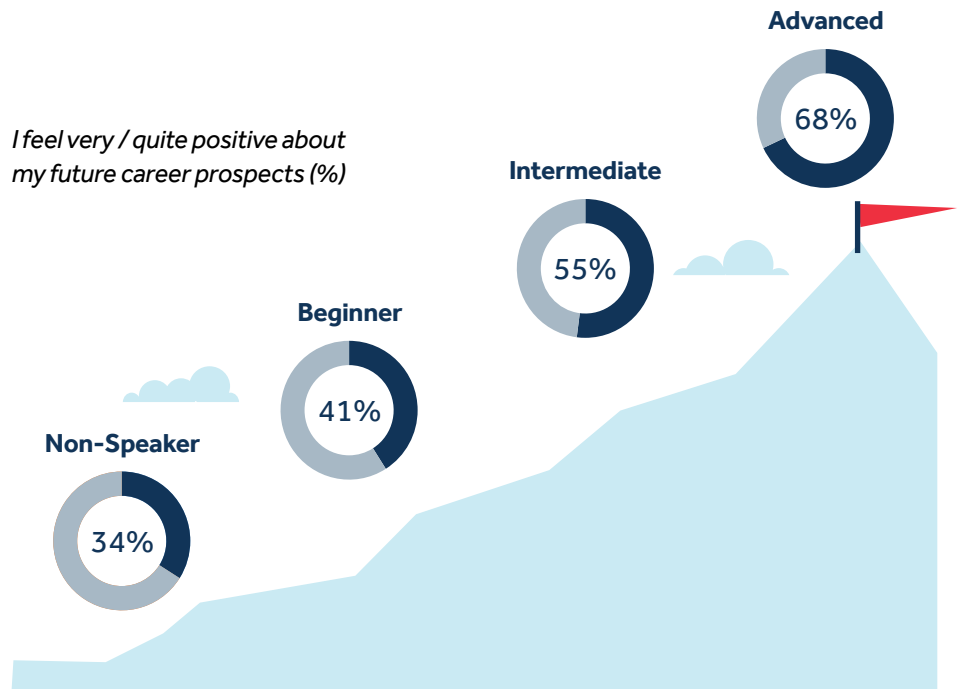
Do the actual benefits of learning English live up to people's motivations?

Yes. Knowing English has a direct and positive impact on people's careers and lives in general, and the higher the level of proficiency the bigger the impact.

Career prospects

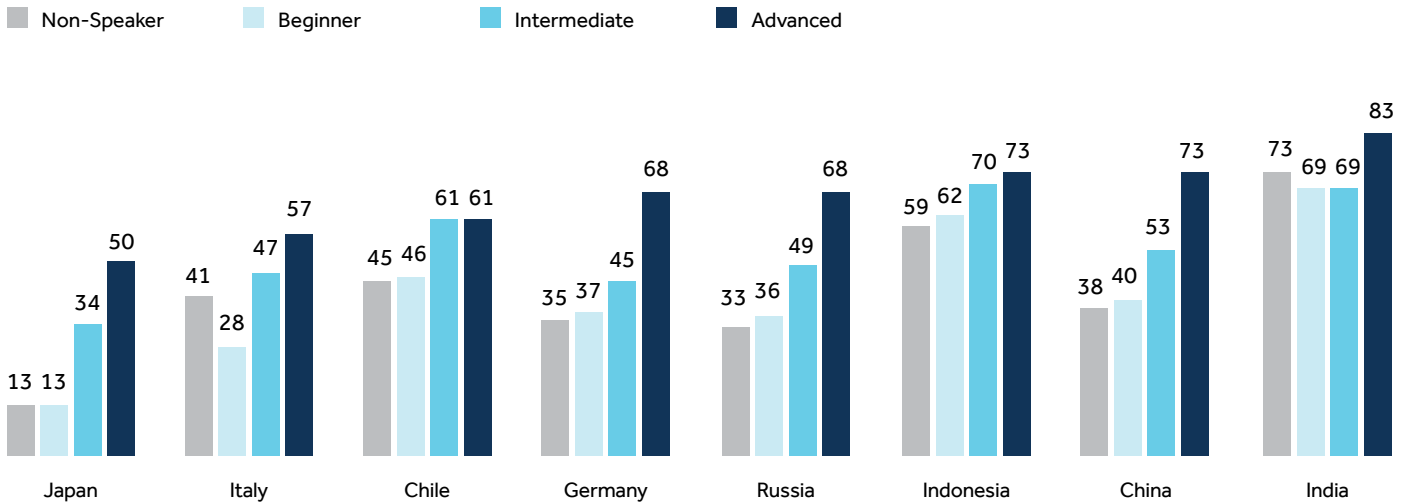
Nowhere is the positive impact of learning English more pronounced than on people's views about their future career prospects. Overall, those who believe that they have achieved an advanced level of English are **twice as likely** to feel positive about their career prospects.

In every country there is a clear correlation between the level of English attained and the degree to which people feel positive about making progress in their careers. This positive feeling truly kicks in as people move from the Beginner stage of their English language learning to the Intermediate stage.



5 | The Benefits of Learning English

Very/quite positive about career prospects



Although the general trend is the same across countries, there are some differences worth noting:

- Japanese workers are the least positive nation overall when it comes to career prospects. However, knowing English has the biggest overall impact on this belief with Advanced English speakers feeling four times more positive about their career than non-Speakers or beginners
- Germany and Russia see the next biggest impact with Advanced learners feeling about twice as positive about their career prospects than non-speakers or beginners
- In Italy, non-English speakers remain fairly positive about their career prospects and it is only amongst those that have already started learning where the positive impact starts to emerge
- In India, where people are generally very positive about their career prospects to begin with, the impact of knowing English only becomes clear when people have attained an Advanced level of proficiency

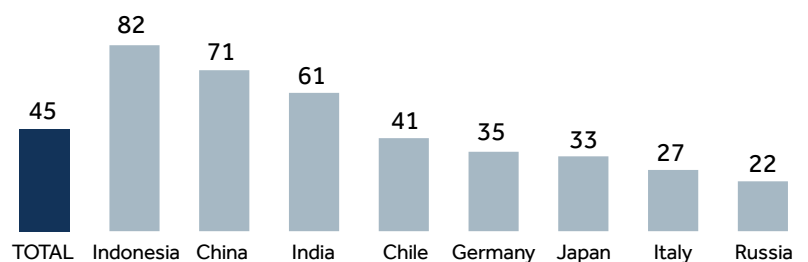
However, it is not just an optimistic feeling about career prospects that learning English brings with it. It directly contributes to people getting jobs that they do not believe that they would otherwise have got.

This is particularly the case in the developing world where the vast majority of English speakers believed that knowing English helped them to secure a job.



45%
knowing English helped them get a job they would not have got otherwise

Has learning English helped you secure a job that you wouldn't otherwise have got? Yes (%)



5 | The Benefits of Learning English

In the more developed markets, knowing English is clearly a lesser factor, but there is still a substantial proportion of workers and students with some level of English who believe that it has helped them to find their desired job. What is very apparent in these markets, however, is the degree to which the level of English proficiency influences the chances of a getting a job. In each of these countries knowing 'just a few words and phrases' (Beginner) does not appear especially helpful in securing a job, whereas around half of everyone who has attained an Advanced level of English say that it has helped them to get a job they want. This emphasises the importance of encouraging working people in these countries to carry on their English learning beyond the basics.

Income boost

Perhaps an even more compelling reason for people around the world to consider learning English is the direct impact that English speakers believe their knowledge of the language has on their earnings. Almost half of people with some level of English across the eight countries believed that they earned an average of 25% more due to knowing English.

It is the developing markets of India, Indonesia and China where the greatest number of people believe that English has helped to boost their income. However, the % income boost is much higher in India (35%) and Indonesia (27%) than it is in China, where a 15% income boost is the lowest of the countries covered. Although the three European markets sampled have the lowest proportion of people saying that English helped to boost their income, the income boost % amongst those people is still fairly substantial ranging from 18%-24%.

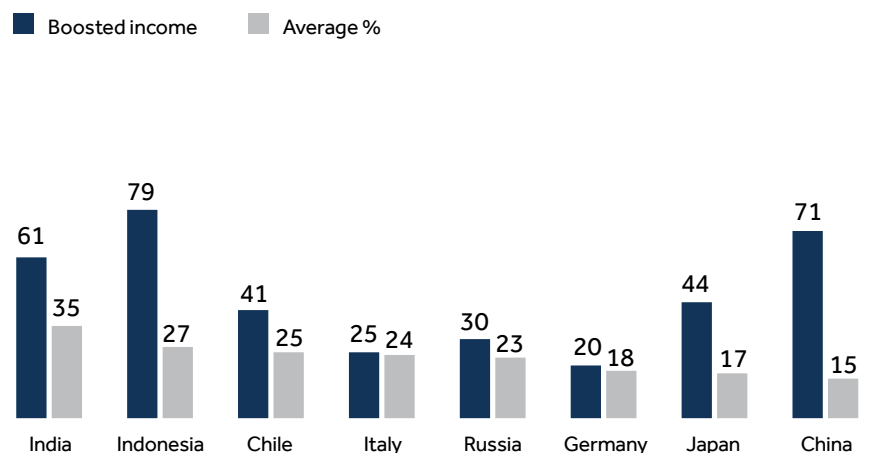
Has learning English helped you to secure a job that you would not otherwise have got? (%)

	Beginner	Intermediate	Advanced
Russia	5	23	47
Germany	5	26	47
Italy	12	22	43
Japan	15	31	58



48% knowing English has directly boosted income by an average of **25%**

Income boost from knowing English (%)



5 | The Benefits of Learning English

The 'Happiness Premium' of speaking English

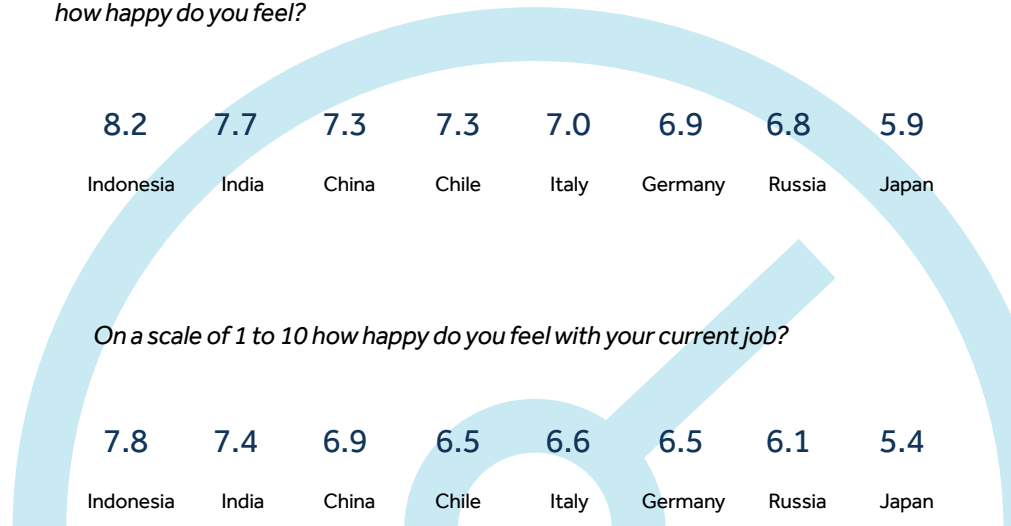
One aim of this survey was to find out whether learning and speaking English had any influence on people's sense of wellbeing and contentment. The first question that participants were asked concerned their overall level of happiness with life in general and their working life in particular. Measured on a scale of 1-10 we can see that overall it is the poorest developing nations that tend to have the higher claimed levels of happiness both with working life and life in general, whilst the career-oriented Japanese have the lowest levels of happiness.

What is noticeable and consistent across all countries is that contentment with working life is lower than contentment with life in general.

Given the high degree of correlation between English proficiency, career prospects and increased earnings seen earlier, we might expect to see that English speakers are more content with their working life in general. This is indeed the case. The average score of 6.1 amongst non-speakers of English moving up to 7.2 amongst Advanced English speakers indicates an overall uplift, or 'Happiness Premium' of 18% on working life.

Furthermore, this premium extends beyond working life and into people's happiness with their life in general. Of course, more things than work come into play when people are rating their overall happiness, but even so, people who speak a high level of English are on average 12% happier with their lives than people who do not speak English at all.

Thinking about your life in general at the moment, on a scale of 1 to 10 how happy do you feel?



On a scale of 1 to 10 how happy do you feel with your current job?

	No English	Beginner	Intermediate	Advanced	Happiness Premium
TOTAL 8 Countries	6.1	6.5	6.7	7.2	18%

Thinking about your life in general at the moment, on a scale of 1 to 10 how happy do you feel?

	No English	Beginner	Intermediate	Advanced	Happiness Premium
TOTAL 8 Countries	6.7	7.0	7.3	7.5	12%

5 | The Benefits of Learning English

This overall trend masks some notable differences between individual countries. The 'Happiness Premium' is much bigger in some countries than in others.

The overall 'Happiness Premium' is really driven by three countries – Japan, Russia and China. Japan in particular stands out in this respect. Of the eight nationalities surveyed, Japanese people indicated the lowest levels of contentment both in terms of working life and life in general, perhaps not surprising given the reputation that Japan has for having a 'long hours' culture. We also saw earlier how

the Japanese tended to have lower levels of English proficiency and were generally less interested in learning English than most of the other nations. Nevertheless, it is clear that those Japanese who have achieved a high standard of English feel significantly more content with their lives than those who have no knowledge of English at all.

Those nationalities with the highest levels of happiness, Indonesians and Indians, are much less influenced in their feelings of contentment by the level of their English, despite the major impact it had on their career prospects and earnings. This lack of influence

at the very highest levels of general happiness is also apparent in Germany, Italy and Chile - perhaps indicating that in all these markets there comes a point where any potential material benefits offered by learning English is insufficient to drive happiness at a more fundamental level.

Happiness with life in general

Happiness with working life

	No English	Advanced	Happiness Premium	No English	Advanced	Happiness Premium
Japan	5.3	7.2	36%	5.0	6.5	30%
Russia	6.5	7.5	15%	6.0	6.8	13%
China	7.3	8.2	12%	6.6	7.9	20%
India	7.8	7.9	1%	7.6	7.8	3%
Indonesia	8.1	8.2	1%	7.7	7.9	3%
Chile	7.4	7.4	0%	6.4	6.5	2%
Italy	7.2	7.1	-1%	6.9	6.9	0%
Germany	7.1	6.9	-3%	6.4	6.7	5%

6

How People Learn English

What methods have English speakers used to learn English and what role has popular culture played in this learning?

Initial methods of learning English

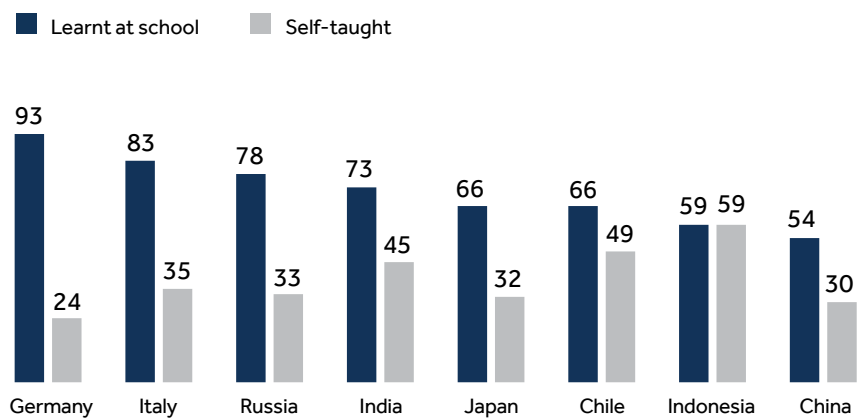
The growth of Internet penetration around the world combined with rapidly increasing smartphone usage and improving mobile technology means that new learners can be attracted by different and more interactive and immersive ways of learning English. Currently, across all eight markets, learning at school is still the way in which the majority of people learnt English, whilst only 17% have taken some kind of online English course.

Whilst almost all Germans learnt some English at school, little more than half of Chinese people did the same. In developing countries such as Indonesia, India and Chile people were much more likely to have used 'self-teaching' methods (e.g. TV, radio etc.) to learn some English, and in Indonesia as many people have used self-teaching methods as have learnt at school. In India (18%) and Indonesia (17%) there is also a much higher proportion of people who have learnt English from a family member than in the other six countries.

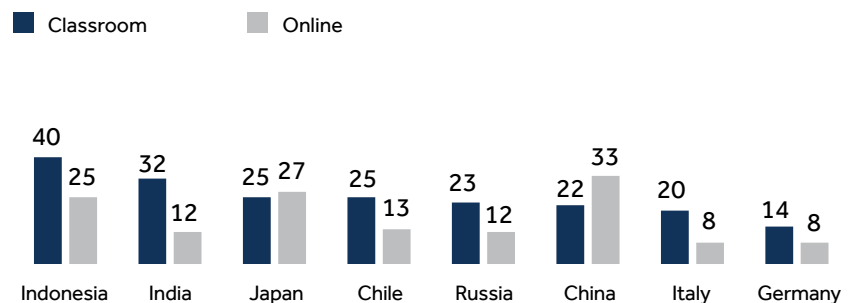
One-quarter of English speakers around the world have taken a classroom-based course at some point in order to learn or improve their English whilst 17% had taken an online English course. Only in Japan and China were people more likely to have taken an online course than a classroom-based course, whereas in other countries people are almost twice as likely to choose the classroom over online. So, although the convenience and flexibility of online learning will continue to attract many learners, it seems

unlikely that it will replace the more sociable classroom environment very soon. It may be that course providers need to develop attractive curriculums of 'blended learning' - courses that take advantage of the many benefits that mobile technology and learning apps have to offer whilst retaining the human interface of the classroom setting.

Methods used to learn English (%)



Taken an English Course - Classroom vs. Online (%)

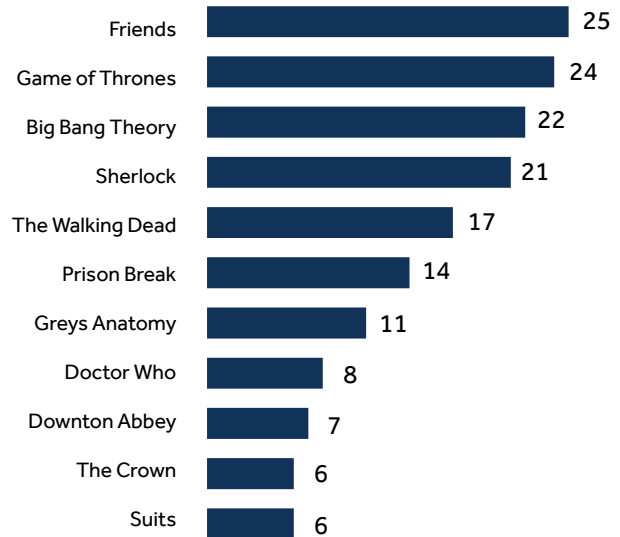


6 | How People Learn English

Popular culture as a means of learning English

With the globalization of popular culture fuelled by content providers such as YouTube which is pushing up towards 2 billion users every month, and streaming services such as Netflix now operating in more than 190 countries, it has become easier than ever for people in different countries to access English language music and television. They can now easily pick up English through casual listening and watching. English speakers in this research were asked which TV shows and music artists they had watched or listened to in order to improve their proficiency.

TV shows watched to help learn English (%)



TV Shows

Of the eleven popular US/UK TV shows that people were quizzed on, two-thirds of English speakers had watched at least one of them, with the most influential shows being 'Friends' and 'Game of Thrones'. 'Friends' had been watched by 25% of English speakers across all markets as an aid to their English learning, closely followed by 'Game of Thrones' on 24% and 'The Big Bang Theory' on 22%. 'Suits' and 'The Crown' were the least popular of the shows, both with 6%.

Not all countries are alike in their preferences for TV shows to help with their English:

- 'Friends' was the number one used TV show in only four countries – India, Indonesia, China and Chile
- In Japan 'The Walking Dead' was top, closely followed by 'Prison Break' and 'Sherlock'
- For Italians 'Friends' was one of the least popular shows, preferring instead 'The Big Bang Theory'
- Likewise, for Germans 'The Big Bang Theory' the was most widely used show, although fewer Germans than any other nation used any TV shows to help with their English, with 59% not using any
- 'Friends' was still a quite popular choice for Russians, but behind both 'Game of Thrones' and 'Sherlock'

Top 3 shows for helping learn English by country

Germany	Italy	Russia	India	Indonesia	China	Japan	Chile
Big Bang Theory	Big Bang Theory	Sherlock	Friends	Friends	Friends	Walking Dead	Friends
Game of Thrones	Game of Thrones	Game of Thrones	Game of Thrones	Sherlock	Sherlock	Prison Break	Game of Thrones
Sherlock	Grey's Anatomy	Friends	Sherlock	Game of Thrones	Big Bang Theory	Sherlock	Big Bang Theory

6 | How People Learn English

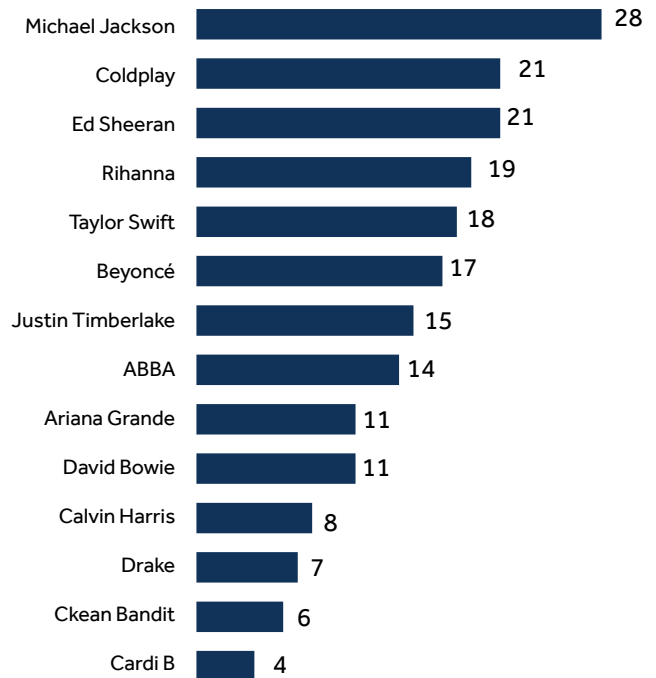
Music artists

Across all eight countries Michael Jackson (28%) was the artist who respondents were most likely to identify as having helped them to learn English, although only in Japan, China and Chile he was the most frequently named artist. Cardi B was the artist least likely to be identified (4%) and was amongst the least influential artists in every country.

Interesting differences between countries include:

- Taylor Swift was highly influential to learning English in India and was the top named artist ahead of Ed Sheeran and Michael Jackson
- Ed Sheeran is also highly influential in Indonesia and Italy, however, in both these countries Coldplay proved to be a more popular choice
- Coldplay was similarly the most influential artist in Italy, where David Bowie also featured more prominently than in most countries
- ABBA is hugely influential in Russia and Japan, occupying top place in Russia and second position in Japan, but barely influential at all in India and China
- Justin Timberlake is more influential in China than anywhere else
- The Germans use English music far less than any other countries to help with their English learning

Music artists used to help learn English (%)



Top 3 music artists for helping learn English by country

Germany	Italy	Russia	India	Indonesia	China	Japan	Chile
Ed Sheeran	Coldplay	ABBA	Taylor Swift	Coldplay	Michael Jackson	Michael Jackson	Michael Jackson
Michael Jackson	Michael Jackson	Michael Jackson	Ed Sheeran	Taylor Swift	Justin Timberlake	ABBA	Coldplay
ABBA	Ed Sheeran	Rihanna	Michael Jackson	Ed Sheeran	Beyoncé	David Bowie	Ed Sheeran

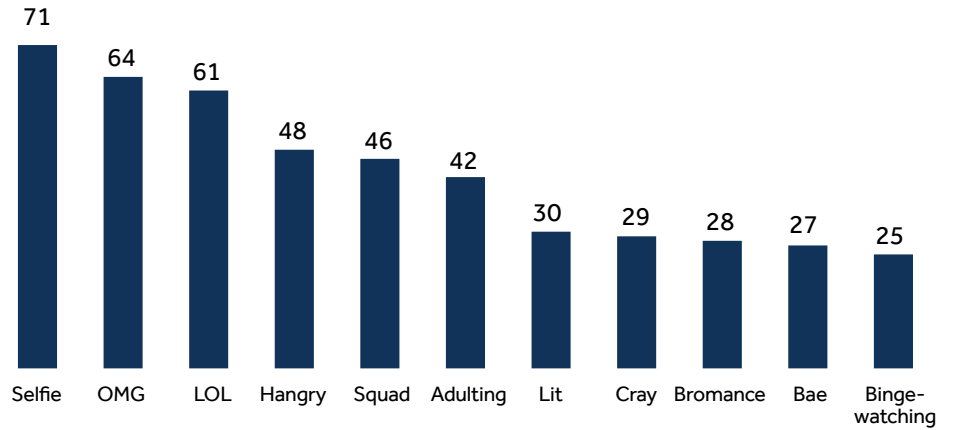
6 | How People Learn English

Understanding of English vernacular

The Oxford English Dictionary estimates that it adds around 1,000 words to the English lexicon every year, many of which will be obscure and rarely used, with some entering the common vernacular and presenting a challenge for learners and users of English. Given the widespread consumption of English language from television and music by English learners around the world, it might be expected that some modern vernacular has seeped into the understanding. A set of eleven 'new' words that have entered the English lexicon over the past decade or so were tested on survey participants to see which ones were most commonly understood.

The word 'Selfie' enjoyed the highest level of familiarity with more than 7 in 10 people being confident in its meaning. After 'Selfie' it was the two texting phrases 'OMG' and 'LOL' which were most familiar, understood by 64% and 61% respectively. The Japanese (33%) and Chinese (22%) were the countries least likely to know the word 'Selfie', whereas the other six countries all had a recognition in excess of 70%, with Indonesia having the highest overall familiarity at 87%.

Confident in meaning of 'new' English words (%)



7

The Future of English

Even though the current demand for learning English is very high, will learning English become even more important in future?

The underlying trends of population growth, especially in the developing markets of Asia and Africa, combined with the urbanisation of these populations, the rise of the middle class and increasing usage of online technology almost guarantees the increasing growth in demand for English in the coming years. On the other hand, the unwelcoming tone adopted by the leading English nations in the form of Donald Trump and Brexit raises the question of a backlash against the English language. Do people in these countries believe themselves that English will continue to grow in importance?

English language learners overwhelmingly believe that learning English will become more important over the next five years, with almost three-quarters saying it would become more important for improving people's prospects in life compared with only 4% who thought it would become less important.

Indonesia is the market with the highest proportion of respondents stressing the importance of learning English to

73%

learning English

will become more important for improving people's prospects in life

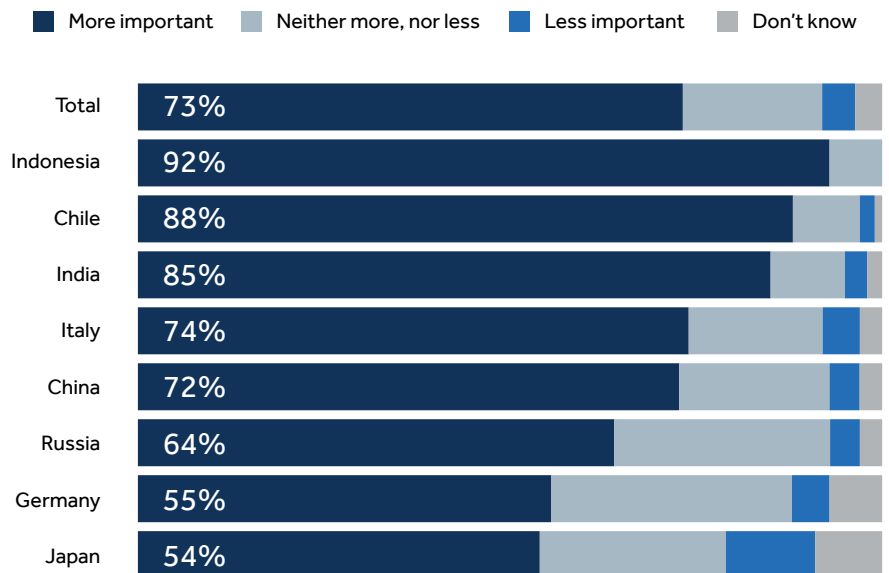
OVER THE NEXT 5 YEARS

improve their prospects in life (92%), with Japan and Germany being the least. Despite this, however, over half of Japanese and German respondents still thought that learning the English language will become more important over the next 5 years.

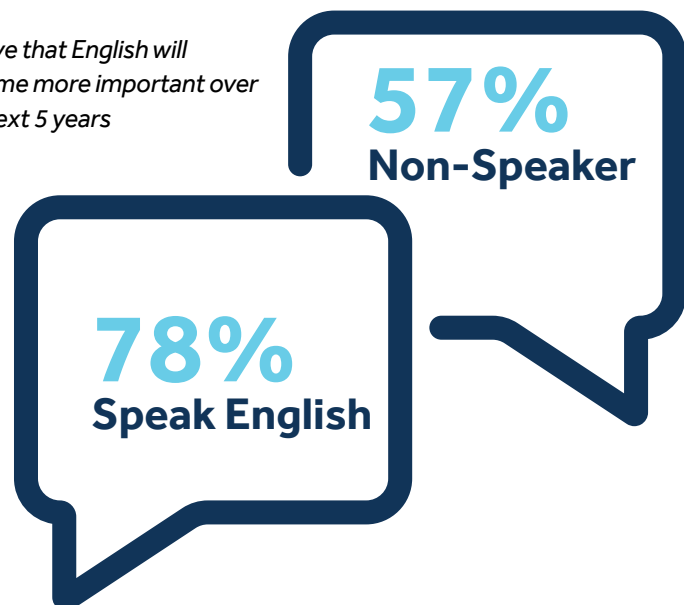
People who already have some English were much more likely to believe in the future importance of English than

non-speakers. However, over half of non-speakers still believe that the importance of learning English will be more important in 5 years' time, and only 10% said it would become less important.

Over the next 5 years will learning English will become more or less important for improving people's prospects in life?



Believe that English will become more important over the next 5 years



7 | The Future of English

Reasons why learning English will become more important in the future

In every country the main reason given as to why learning English would become more important was around 'building relationships with people around the world', reflecting the growing understanding that English can provide the basis for bringing the world closer together across both commercial and cultural spheres. Beyond this, there is a belief that English will become more important in getting along in certain jobs, and that there will be increasing expectations from employers that their workforce should have a good level of English. However, fewer people

believed that Employers would actually be prepared to pay more for English language skills, indicating that English skills may become increasingly a hygiene factor in employment decisions in the same way that numeracy and

literacy currently are. This is especially the case in the developed markets of Germany, Italy and Japan, whilst the belief that increased pay may be on offer for English speakers is higher in the developing world.

Why will learning English become more important?	Total
To build relationships with people around the world	65%
For understanding specialist terminology related to professional life	54%
Employers will increasingly look for a good level of English when hiring	51%
To understand and create social media content in English for exchanging ideas and networking	49%
Employers will increasingly pay more for employees that can speak English	33%
Translation technology will still not be advanced enough to accurately replicate a native English speaker	28%

Reasons why learning English might become less important in the future

Only 4% of people believe that English will become less important in future. The most common belief amongst this group is that technology will be responsible for the decline of English. One-quarter of them believe that improvements in translation technology will steadily erode the need for people to learn a second language. Beyond this, some people believe other languages may increase in importance, or that the

English speaking world will decline in importance on the global stage. These beliefs pale into insignificance in the

face of the overriding belief that English will provide the future foundation for building global connections.

Why will learning English become less important?	Total
As translation technology improves, learning another language may not be necessary	26%
Other languages will become more important in business instead	19%
English speaking countries will become less dominant on the global stage	18%
Generally, the economy is improving in my country so the need to speak English is less pronounced	18%
It will be seen as less of an advantage because everyone speaks it	17%
People will look protect their own language and encourage others to learn it	13%

8

The Business Opportunity

A 2018 analysis of the global English language training market by HTF Market Intelligence forecast that the value of the adult English language sector globally will increase by more than 80% from the 2017 level by the end of 2023, an absolute increase of US\$28billion. The YouGov research fully supports this optimistic financial outlook for the sector by showing how consumer desire for learning English is strong across a range of markets and by demonstrating how learning English benefits both the personal and professional prospects of those who embark on the journey.

This research shows how personal and professional happiness can be strongly influenced by the level of English language skills obtained, with all countries believing more in their career prospects the higher level of English they have attained. As both

the size of the global population and the proportion of the ambitious middle class within that overall population grow, particularly in the developing powerhouses of India and China, the improved career and personal prospects associated with learning English will be a powerful motivation to take up English language courses.

The vast majority of the working population across the globe believe that English will only become more important over the next five years, whilst virtually no one thinks it will become less important. This is not only due to opportunities in the work place, but down to increasing travel opportunities for people around the world, as well as the popularity of English language culture fuelled by the growing connectivity across the world. People want to learn English as they

believe it will help them to join in more fully with this global community.

Half of working people surveyed across the eight markets in this study stated that they would be likely to take an English language course in the next five years. This extrapolates to a total of 1.4 billion people globally who can be considered as good prospects for the sector over that time. By any standards this is an enormous pool of potential customers for providers of English courses to pursue and provides every reason to feel optimistic about the financial prospects for operators in the sector.



