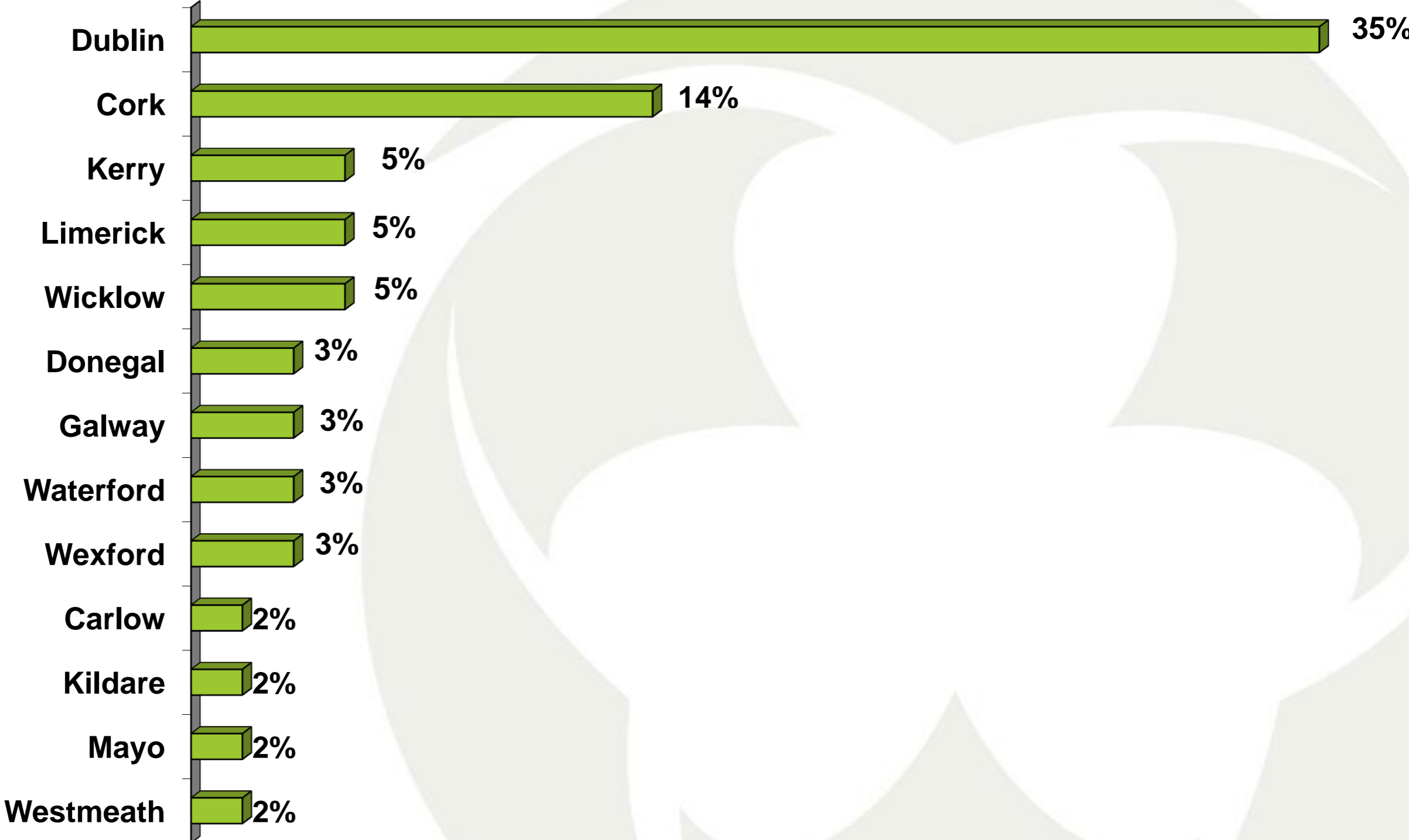


Survey Methodology

- Between January 18th and February 21st 2011 Fáilte Ireland conducted an online survey of schools offering courses in English as a foreign language.
- 112 schools and language centres were sent a link to an online questionnaire.
- Of these, 63 completed the questionnaire.
- Unless otherwise stated the results outlined relate to these 63 respondents.

Profile of Sample - Location of School

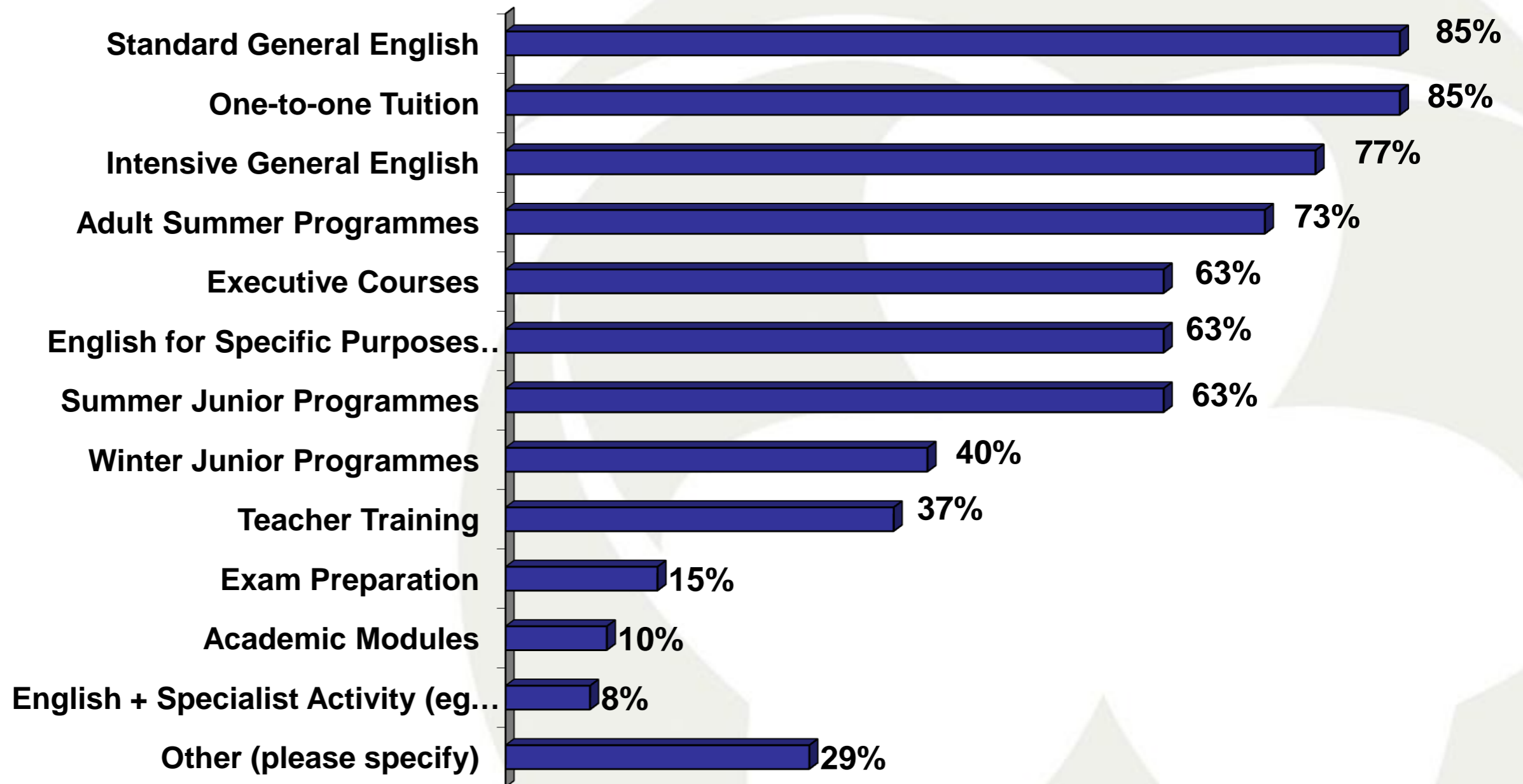
(% of Responding Schools)



Source: (Q1, 63 responses)

Profile of Sample – Courses Offered

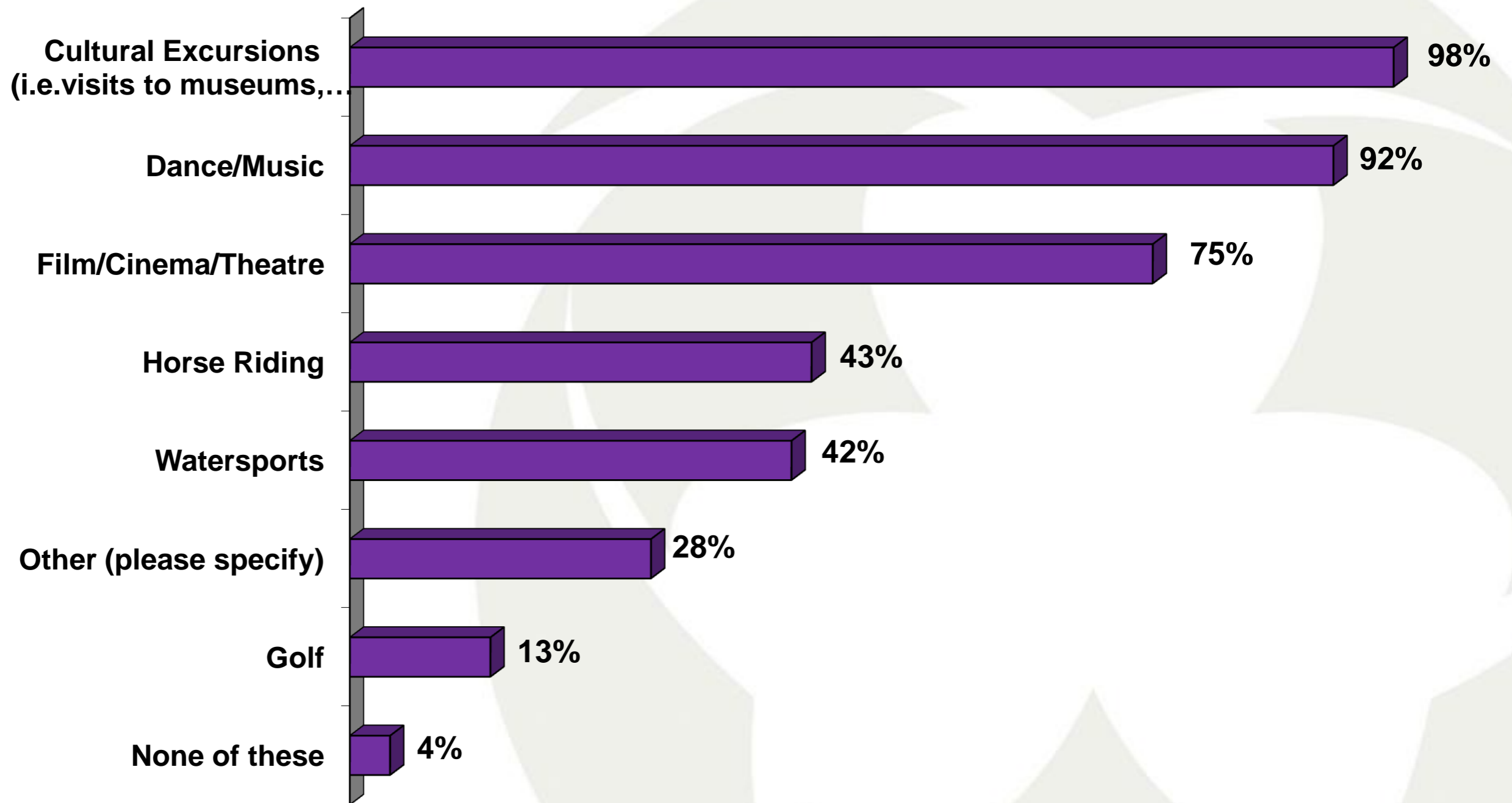
(% of Responding Schools)



Source: (Q4, 62 responses)

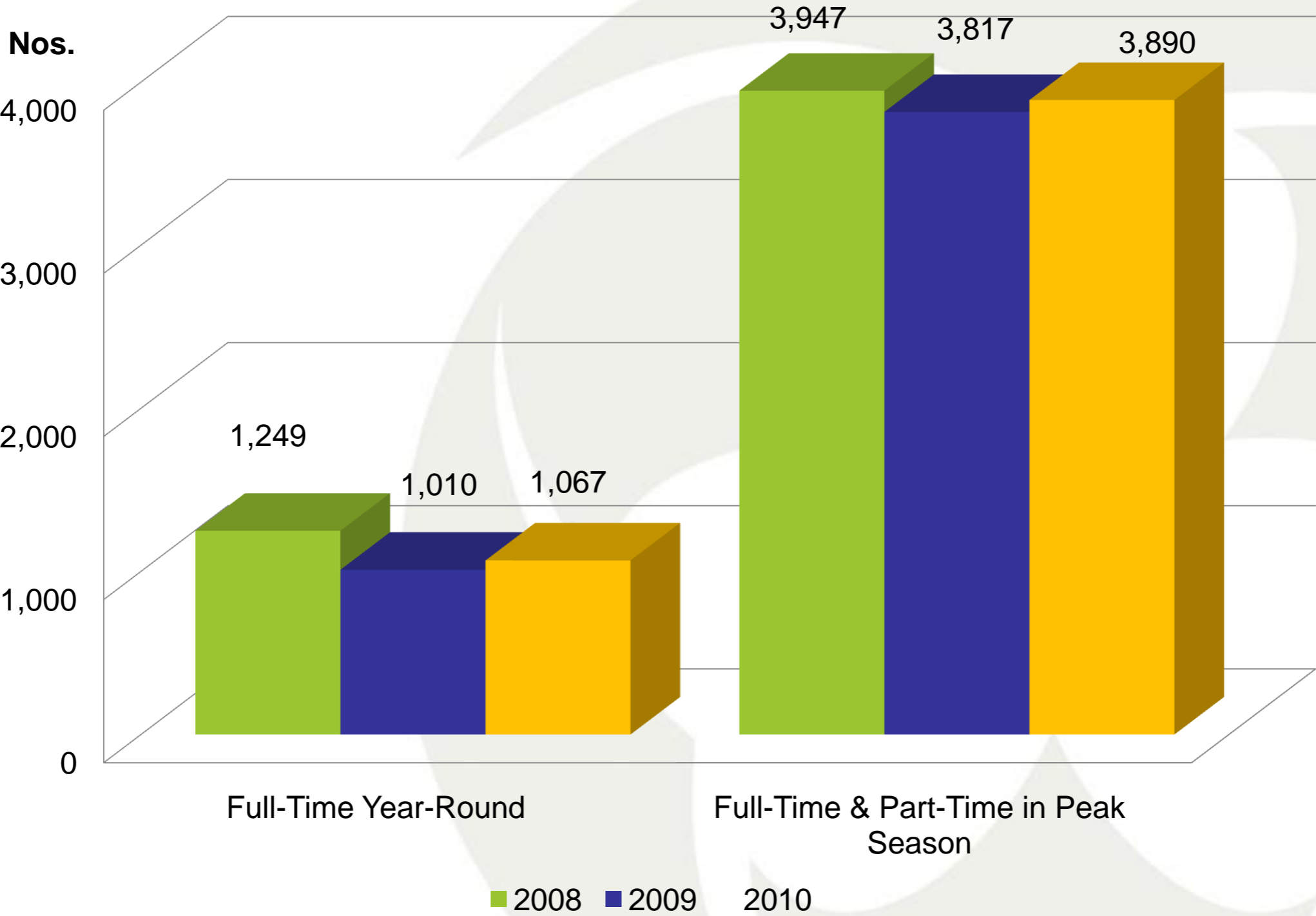
Profile of Sample – Activities Offered

(% of Responding Schools)



Source: (Q9, 53 responses)

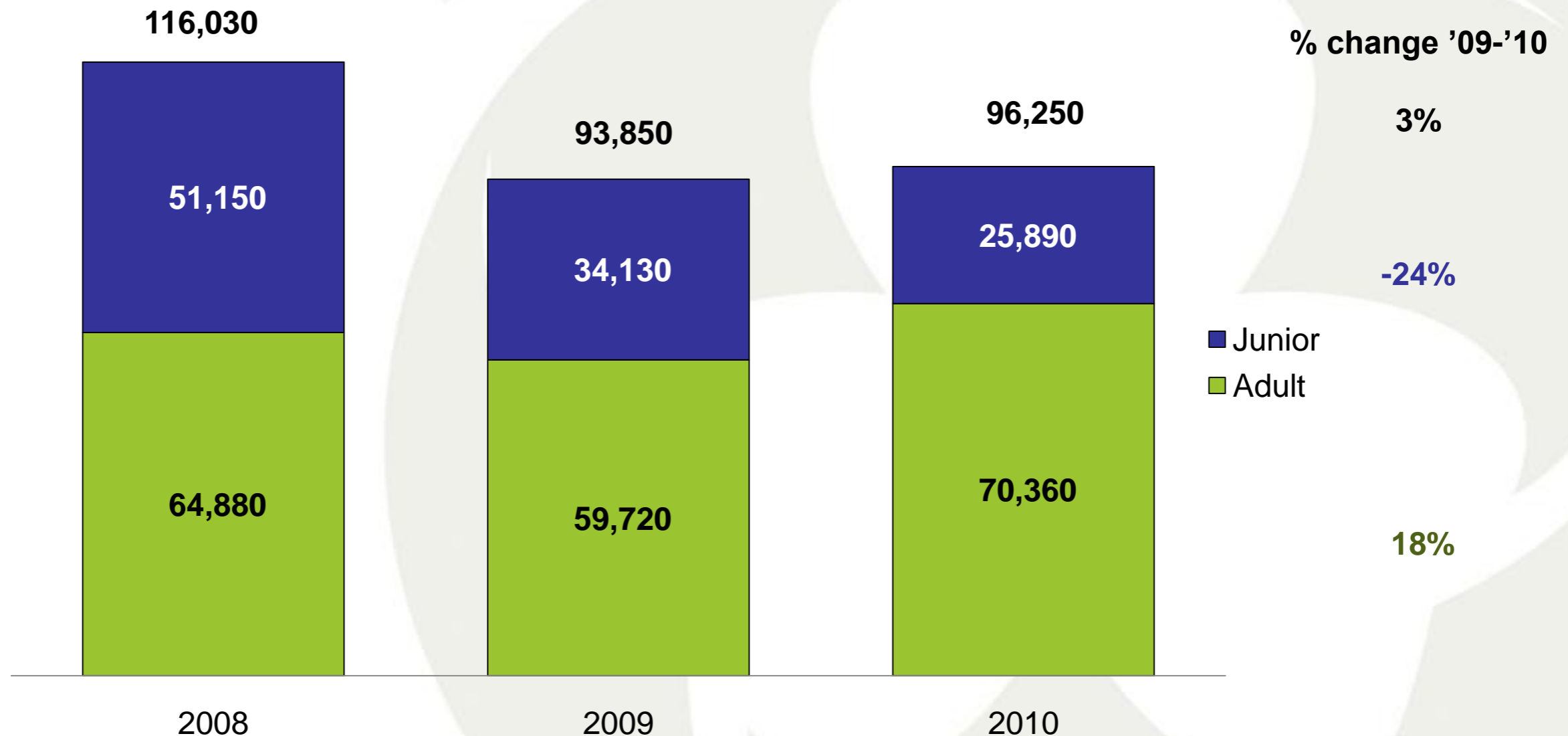
Estimated Staff Numbers 2008-2010



Source: (Q2 & 3, weighted up from survey responses to schools)

Overall Estimated Student Numbers 2008-2010

- An estimated 96,250 overseas students studying in the 112 approved schools & language centres in Ireland in 2010.

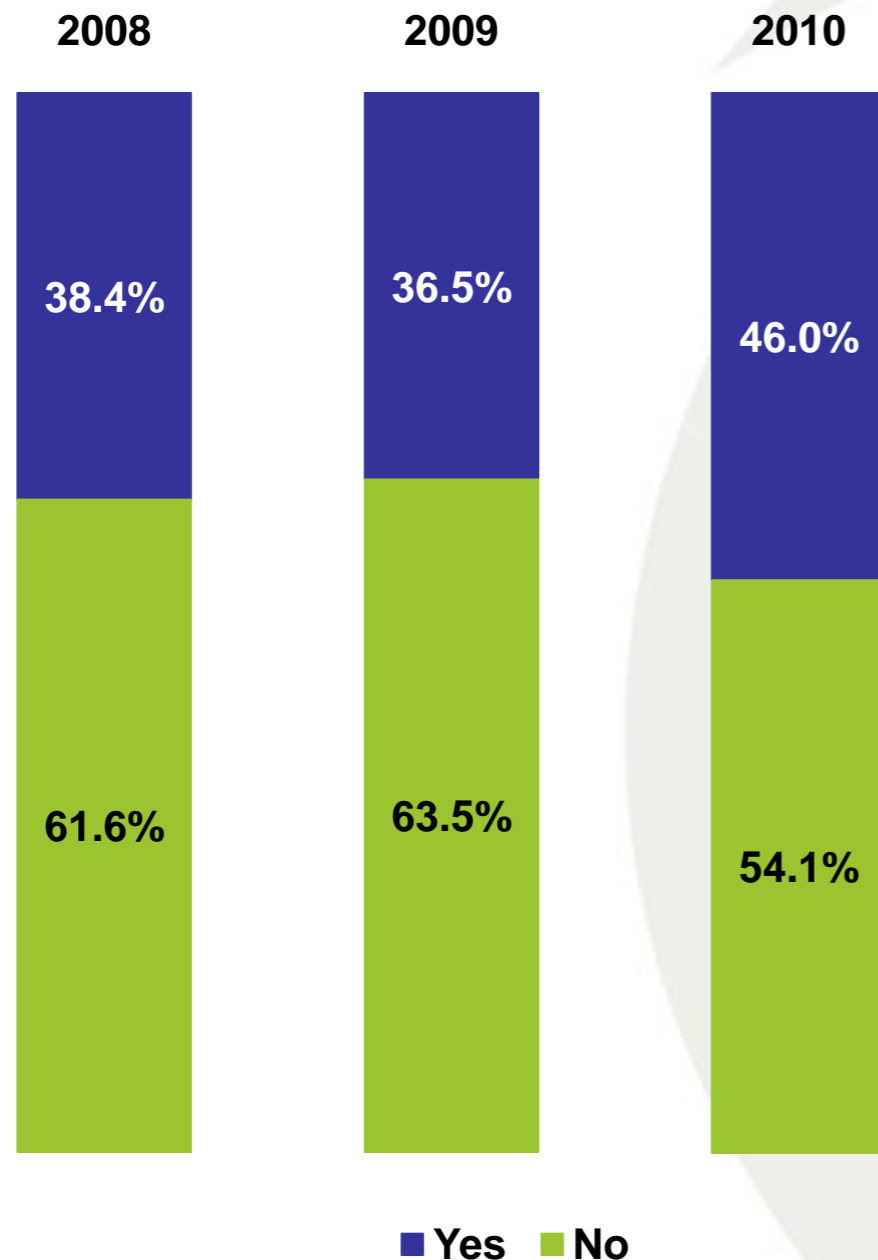


Source: (Q8,12, 18, 24, & 30; weighted up from survey responses to total schools.)

*Estimates relates to students attending approved ELT schools only and rounded to the nearest 10.

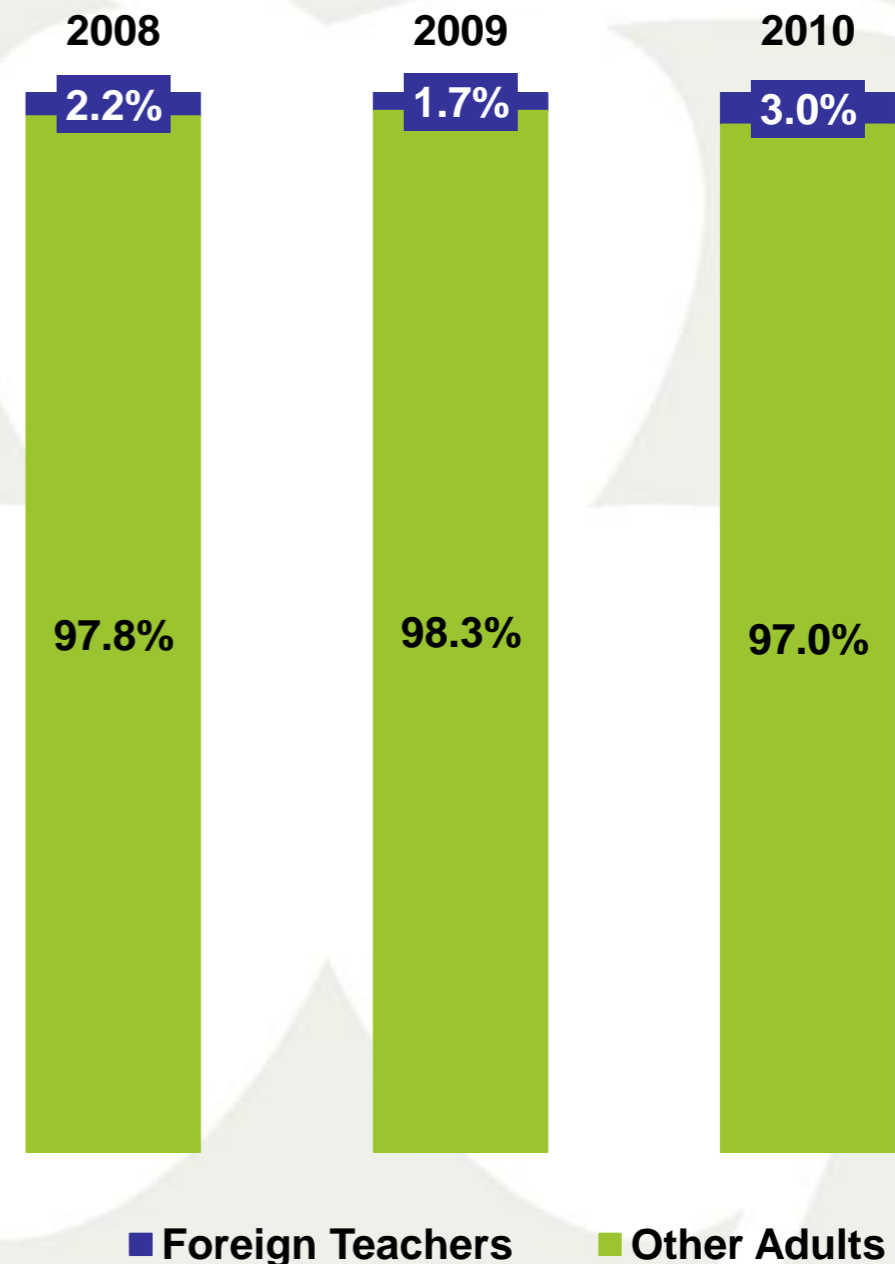
Foreign Teachers on Refresher Courses

Schools/Centres Providing Refresher courses for Foreign Teachers?



Source: (Q5, 61 responses in 2010)

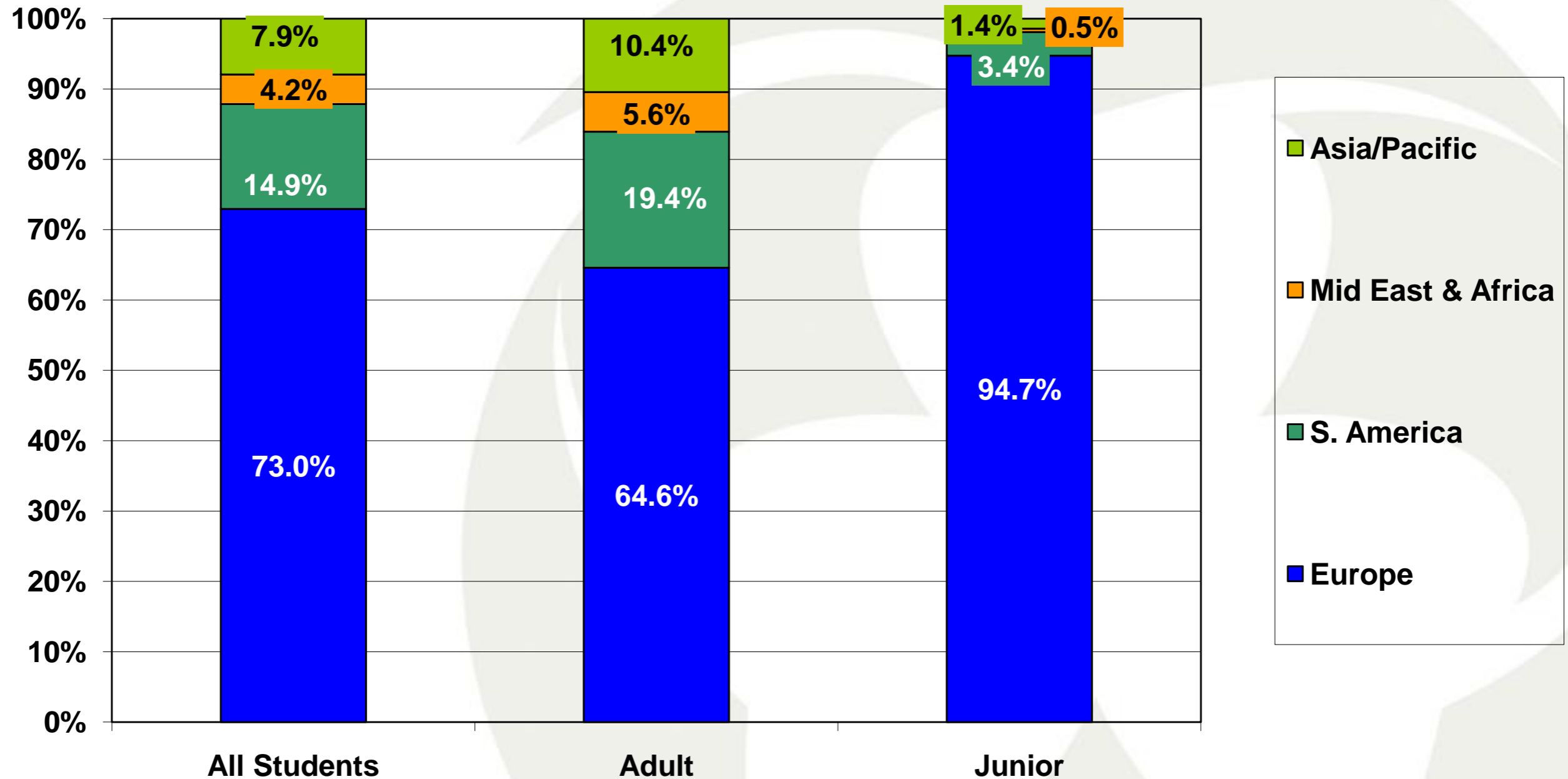
Foreign Teachers as Proportion of Adult Students



Source: (Q5, weighted up from 61 responses to 46% of schools)

Estimated Students by Region & Age 2010

(% of total)



Source: (Q7,12, 18, 24, & 29; weighted up from 61 responses to 112 schools)

Estimated Students by Region & Age 2010

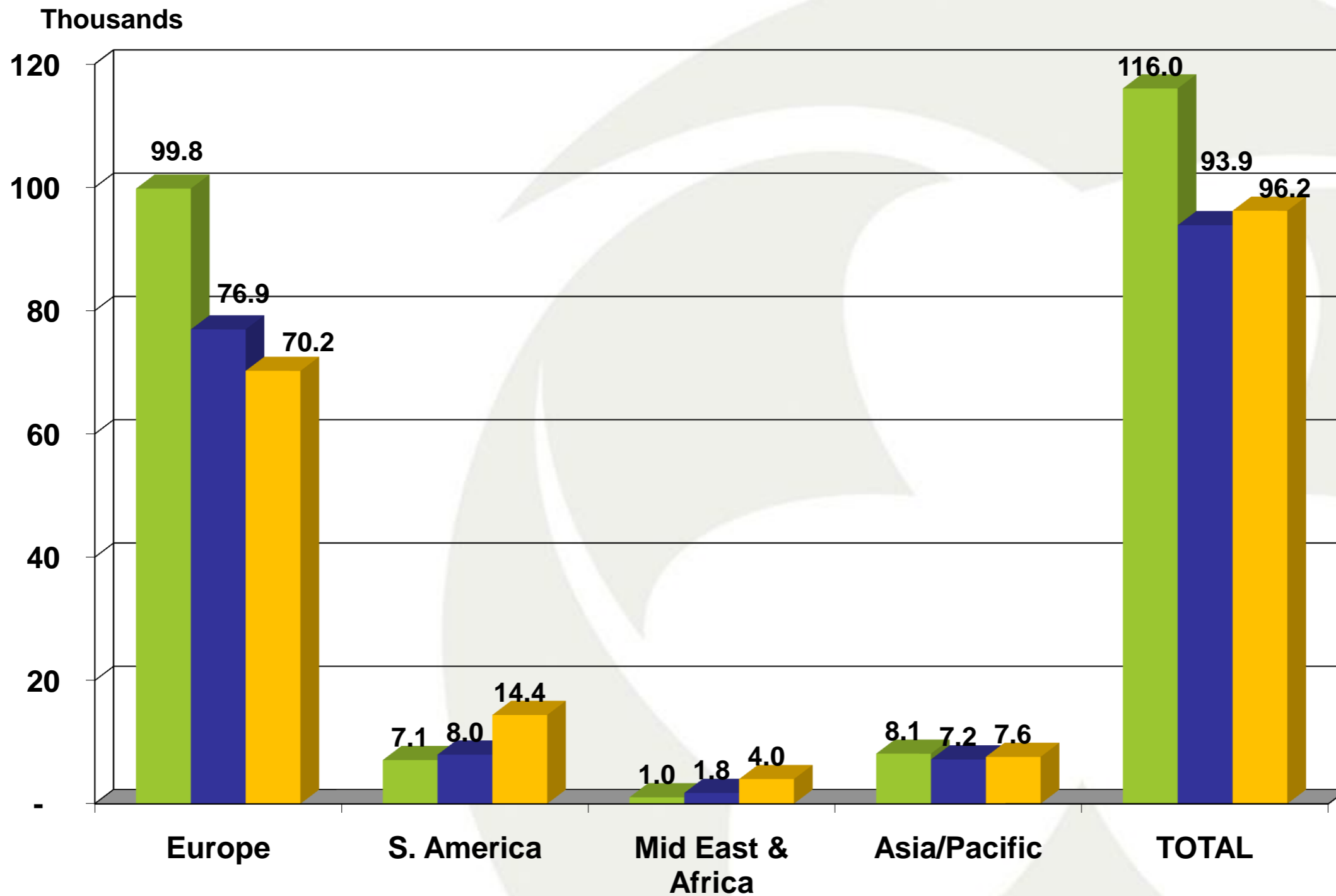
(Numbers)

	All Students	Adult	Junior
Europe	70,200	44,900	25,300
S. America	14,400	13,500	900
Mid East & Africa	4,000	3,900	100
Asia/Pacific	7,600	7,300	400
Total	96,200	69,500	26,700

Source: (Q7,12, 18, 24, & 29; weighted up from 61 responses to 112 schools)

Note: All figures rounded to the nearest 100

Estimated Students by Region 2008- 2010



**% Change
2009-2010**

-9%

+80%

+131%

+6%

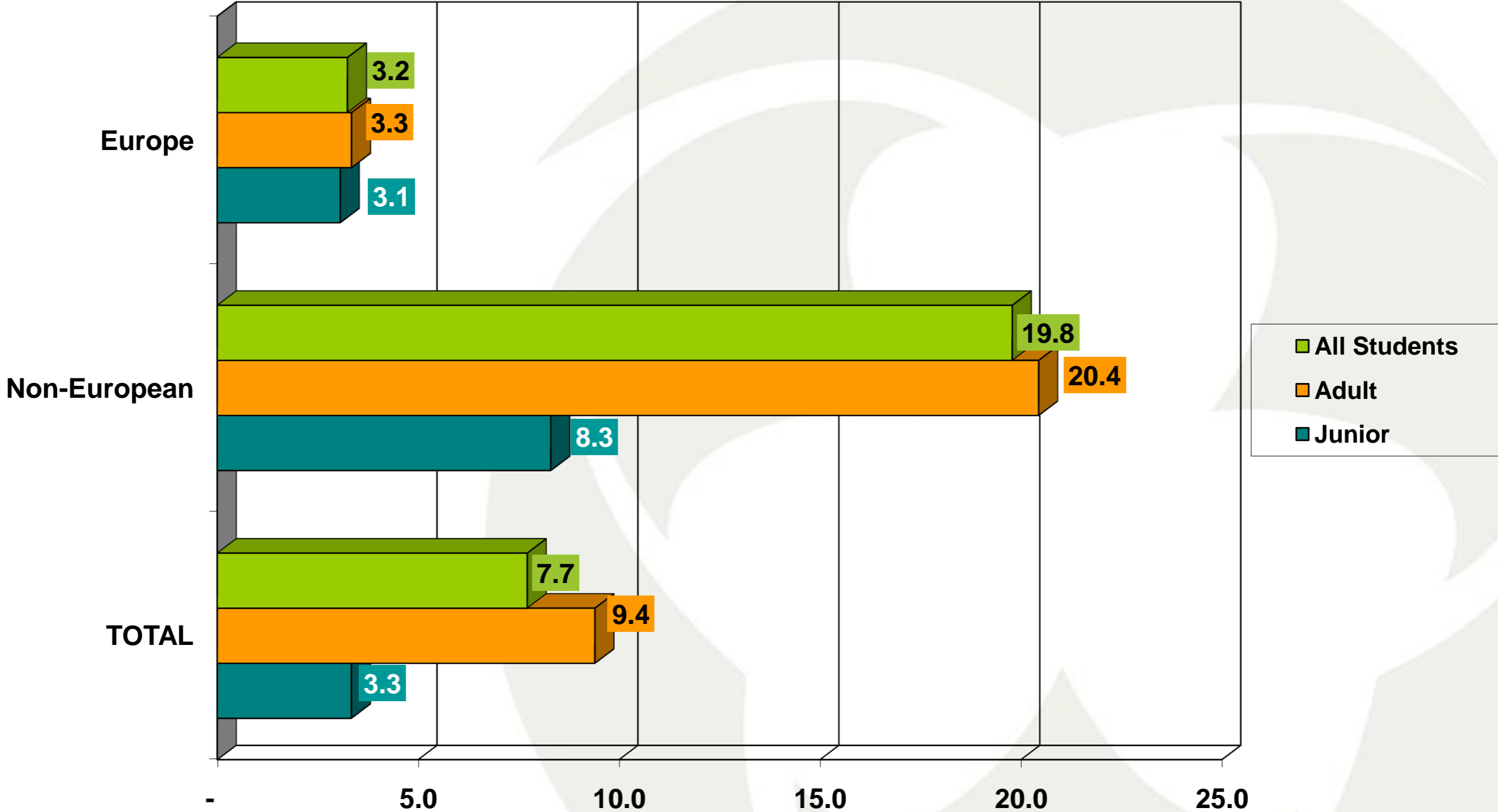
+3%

■ 2008 ■ 2009 ■ 2010

Source: (Q7,12, 18, 24, & 29; weighted up from 61 responses to 112 schools)

Note: All figures rounded to the nearest 100

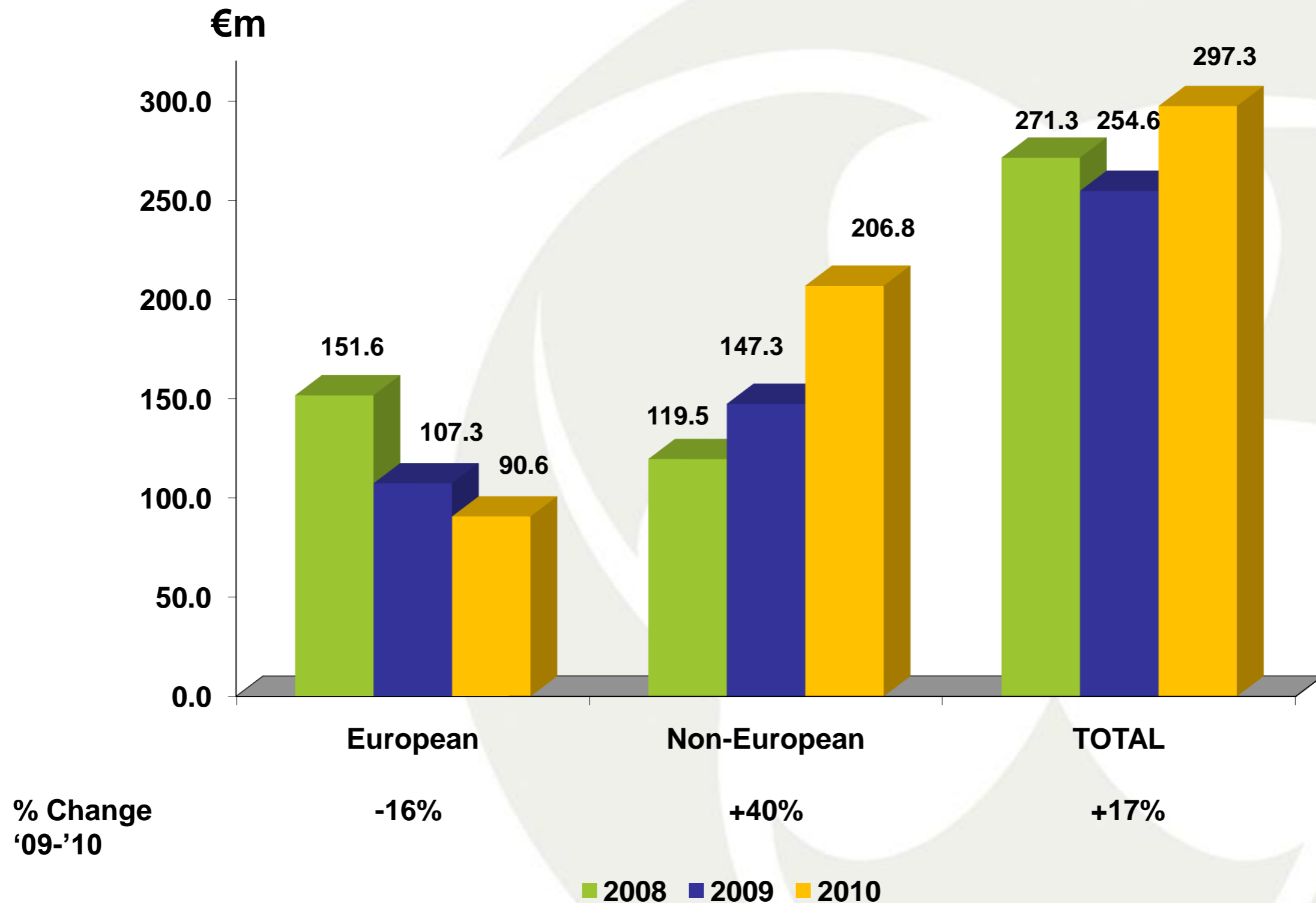
Average Length of Stay by Region & Age (Weeks)



Source: (Q14,15,20,21,26,27,32 & 33, 64 responses)

Estimated Revenue Generated

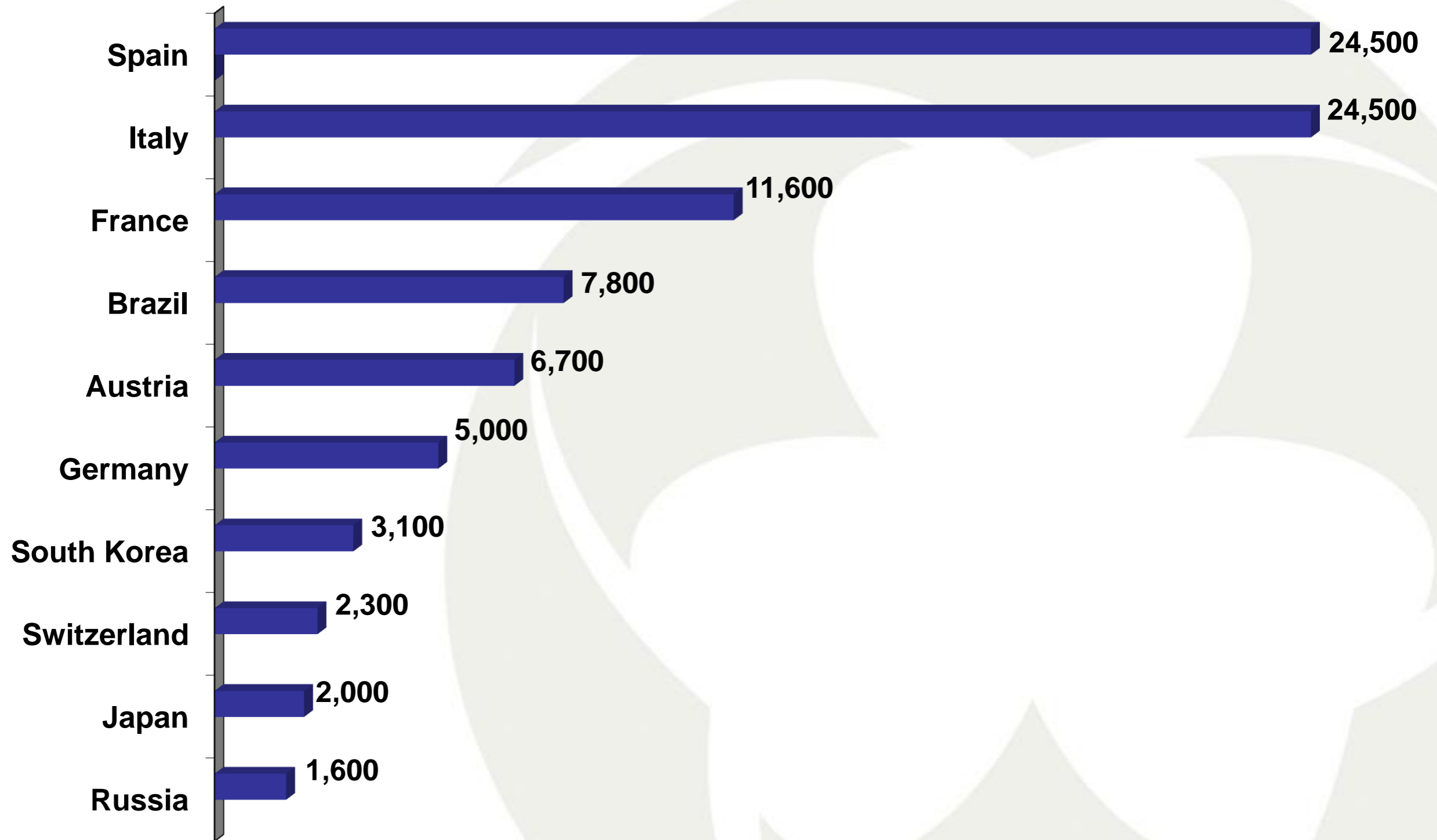
- Average weekly expenditure = €401.73 per adult student, €391.18 per junior student



Source: (Q10 x length of stay; weighted up to estimated student numbers)

Top Ten Markets

Three Year Average Numbers (2008-2010)



Source: (Q7,12, 18, 24, & 29; weighted up from 61 responses to 112 schools)

Note: All figures rounded to the nearest 100