

Learning English in Brazil

Understanding the aims and expectations
of the Brazilian emerging middle classes

A report for the British Council by Data Popular institute

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Learning English in Brazil

Introduction

The more affluent in Brazil have had access to English learning for many years. However, overall English proficiency levels in Brazil are still very low, with only around 5% of Brazilians stating they have some knowledge of English. How can effective English teaching be implemented to reach the emerging middle classes? And what are the aims and expectations of these learners?

This report was drafted by Data Popular for the British Council to answer these questions. It includes an appraisal of current English language teaching provision, identifies business opportunities in English teaching and explores the specific needs of different groups seeking to learn English. It is relevant to teachers, school managers, academics and policy makers interested in the teaching of English for the Brazilian emerging middle classes.

The report focuses on Brazil's growing middle and lower-upper classes and draws particular attention to their interest in learning English to enhance employment prospects. It does not look at other social groups. Nor does it examine the demands of specific economic sectors, or the specific language requirements of scientific and technological research.

The research was conducted in 2013 and involved three phases. In the first phase, Data Popular's own data sets were analysed alongside publicly available data sets, such as those provided by the Brazilian Geography and Statistics Institute (IBGE) and the Ministry of Labour. In the second phase, a series of interviews with Human Resources professionals, specialist and government agencies were conducted. Alongside this, a series of focus groups were held with middle class professionals aged between 25 and 35. In the final phase, a survey of 720 middle and lower-upper class Brazilians aged 18-55 was conducted in all regions across the country. The analysis of the results from these three phases formed the basis for this report.

1

English proficiency in Brazil

In Brazil, 5.1% of the population aged over 16 state that they have some knowledge of the English language. Nevertheless, there are differences between the generations. Among younger people aged 18-24 the percentage of those stating they speak English doubles, reaching 10.3%. One in 10 people aged 16 and above state that they hope to start an English course in 2014.⁽¹⁾ In Brazil the

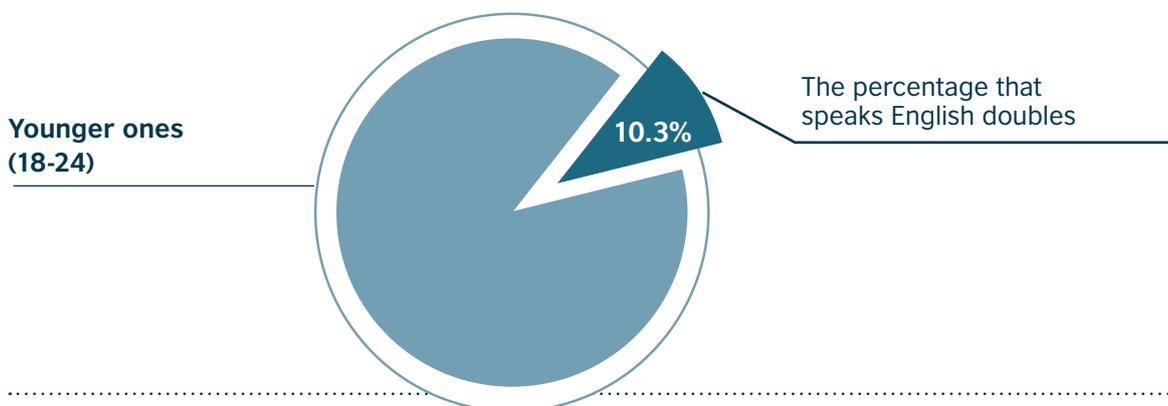
lack of good quality basic education coupled with limited access to private English courses makes it hard for employers to find employees with the levels of English they require.

ONLY 5% OF BRAZILIANS STATE THEY SPEAK ENGLISH

People 16 years old or older



People 16 years old or older

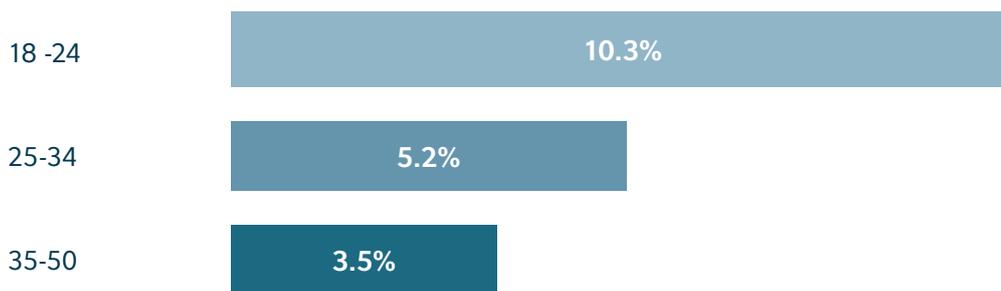


Source: Data Popular Research: Brazil into Perspective 2013 - Base: 1500

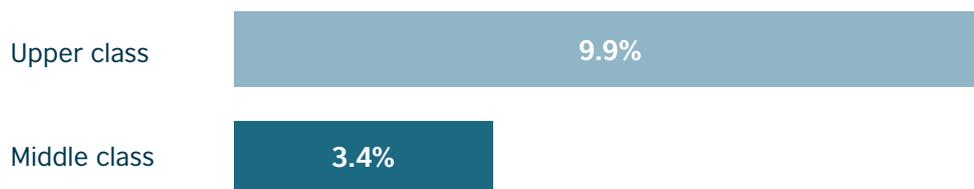
¹ Source: Data Popular Research: Brazil into Perspective 2013

ENGLISH-SPEAKING POPULATION BY AGE GROUP AND CLASS

Age group

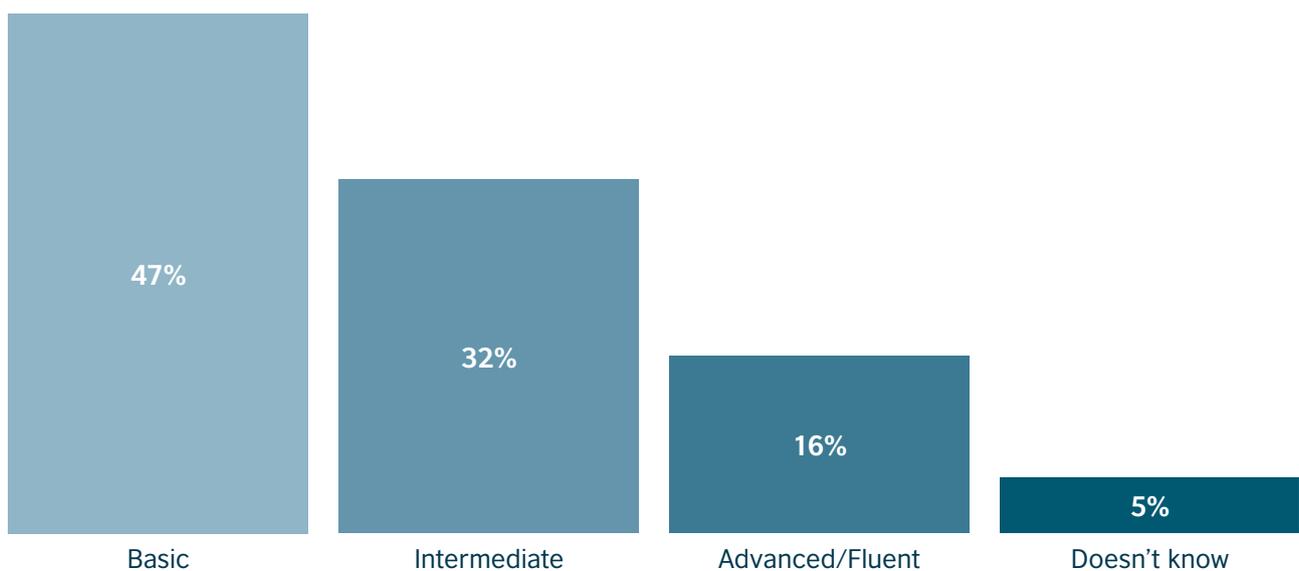


Class



Source: Data Popular Research: Brazil into Perspective 2013

ENGLISH LANGUAGE LEVEL (AMONG THOSE THAT KNOW ENGLISH)



Source: Data Popular Research: Brazil into Perspective 2013 - Base: 68

2

Education in Brazil

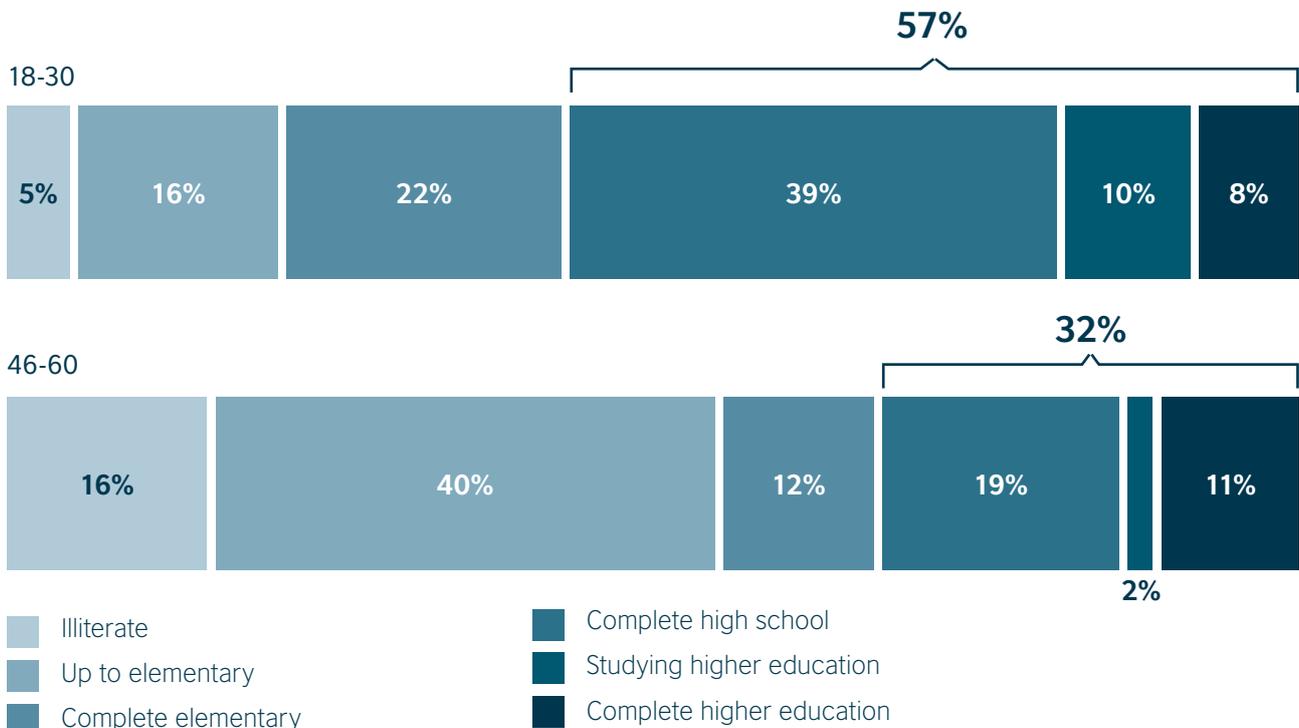
The level of knowledge of the English language amongst Brazilians reflects both the educational opportunities available and, more broadly, the provision of education in Brazil.

When analysing the factors that influence the demand for English language training, the first point to highlight is the educational leap that has taken place in Brazil. More recent generations have higher levels of schooling than previous generations. Data from the National Research by Household Sample (PNAD) indicates that only 32% of those aged 48 to 60 years have been schooled beyond elementary level. This is in stark contrast to those aged 18 to 30 years of age, 57% of whom progressed beyond elementary level. ⁽²⁾

Overall, literacy levels in Brazil are still low. Only a third of Brazilians have read a book in the last year and of this third, only half have read more than two books. This may explain why almost 30% of people in Brazil do not have a single book in their home.⁽³⁾

The Brazilian's Perception research indicates that education is highly valued. For the elite, education is an important marker of social standing; for the middle class, it is an important tool for social progression. University is perceived as a way of developing the basis for a professional career. For 8 out of every 10 people, the main reason to go to university is to get a better job, and 84% of people believe that level of education is directly related to earnings.

SCHOOLING LEVEL BETWEEN GENERATIONS



Source: Data Popular based on PNAD

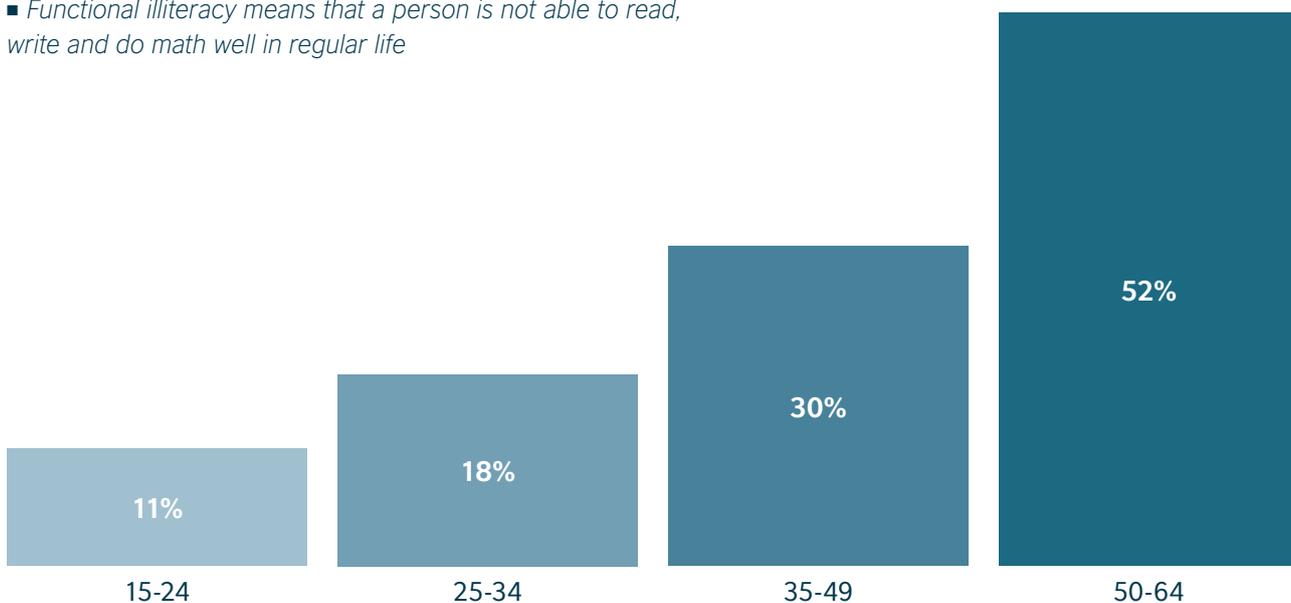
²Source: Data Popular based on the PNAD

³Data Popular Research: Brazil into Perspective 2013

PROFILE OF BRAZILIAN FUNCTIONAL ILLITERATES

Age group

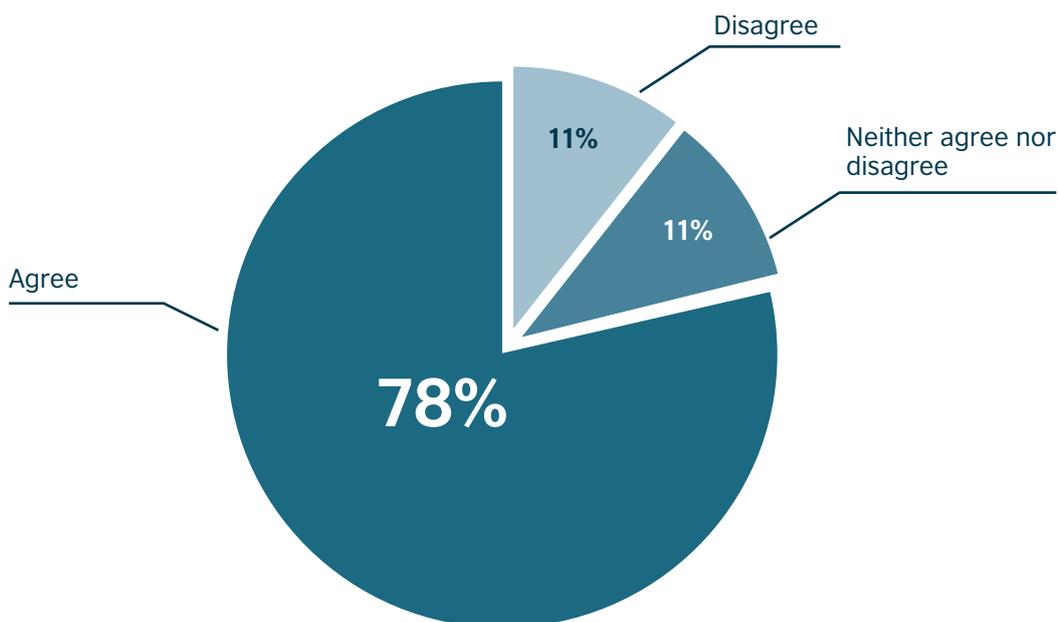
■ Functional illiteracy means that a person is not able to read, write and do math well in regular life



Source: Data Popular based on the 2011 INAF (Indicador Nacional de Analfabetismo Funcional)

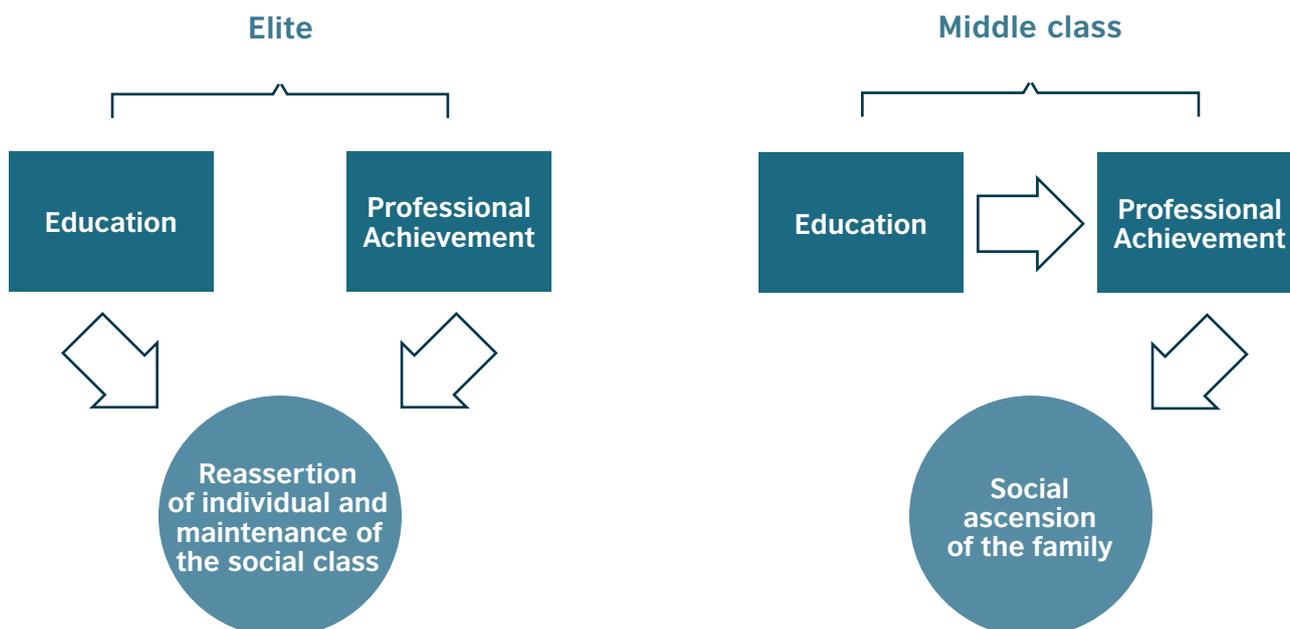
THE ROLE OF HIGHER EDUCATION IN THE WORK MARKET

(% agreeing or disagreeing with the following statement: The main reason to go to university is to improve your CV)



Source: Brazilians' Perception – 1,800 cases

EDUCATION: SYMBOLIC VALUE ACCORDING TO SOCIAL CLASS ⁽⁴⁾



⁴Socio-economic Classes in Brazil:

Class	Class definition	Monthly income per family member Values in Brazilian Reais	Average monthly income per family Value in Brazilian Reais
A	Elite - Upper Class	Above R\$ 2,728	R\$ 14,285
B	Lower Upper Class	R\$ 1,120 - 2,728	R\$ 5,329
C1	Upper Middle Class	R\$ 705 - 1120	R\$ 3,094
C2	Middle Class	R\$ 485 - 705	R\$ 2,117
C3	Lower Middle Class	R\$ 320 - 485	R\$ 1,694
D1	Vulnerable	R\$ 178 - 320	R\$ 1,133
D2	Poor	R\$ 89 - 178	R\$ 713
E	Extremely Poor	Up to R\$89	R\$ 250

Values from July 2013, according to INPC in Brazil

Exchange rate at the time was approximately 3.410 Reais per GBP

3

English learning in Brazil

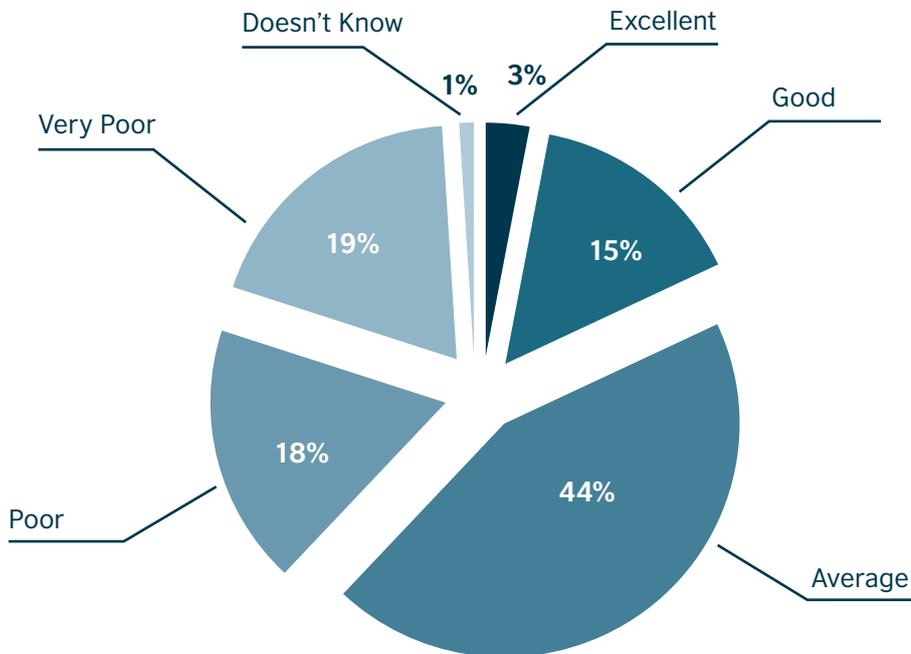
Statutory and the National Curricular Guidelines make the teaching of a foreign language at elementary and high school compulsory. However, teachers and experts acknowledge that English teaching - both public and private - is unable to provide students with a usable level of English. They identify similar reasons to those that cause other problems in basic education: the lack of language teaching equipment and over-filled classrooms. There are also fundamental problems with the amount of time set aside for teaching English and it is hard to find adequately qualified teachers.⁽⁵⁾ In these conditions English teaching is reduced to

the basic rules of grammar, reading short texts and learning to pass multiple choice exams for university admittance.

Even government officials admit that English teaching in basic education has many shortcomings. The National Curricular Guidelines (which outline the curriculum for each subject) are well articulated, but cannot be applied fully in practice. Officials have pointed out that there are no language labs in schools as there is little funding available for them.

THE QUALITY OF PUBLIC EDUCATION

How people rate public education in Brazil



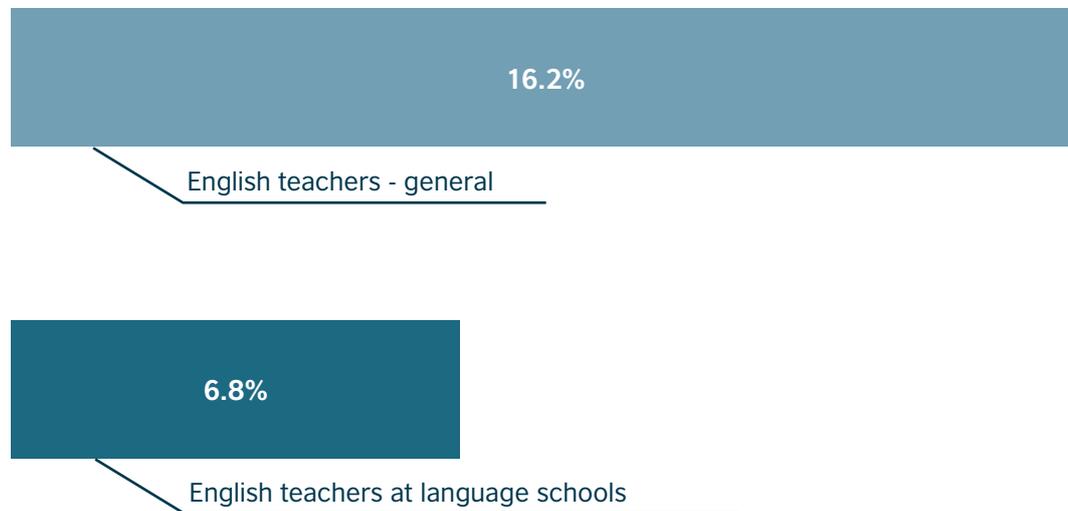
Source: Data Popular based on the 2011 Public Opinion Research/Senate Data

⁵(Teaching the English language in Brazil. In: BABEL: *Electronic Foreign Language and Literature Magazine*. N.01 Dec. 2011. Available at: <http://www.babel.uneb.br/n1/n01_artigo04.pdf>, accessed on 22/05/2013.

ENGLISH TEACHERS IN BRAZIL

Total number of English teachers formally registered

■ Language schools do not register their teachers and employees. There are also many unregistered private teachers.



Source: Data Popular based of RAIS/MTE

They feel that this limits oral communication, a problem that many educators have argued is exacerbated by the large number of students in the classroom.

Government representatives and teachers alike have bemoaned the poor quality of language teachers working in basic language education. They argue that a bachelor degree in literature coupled with a teaching license does not prepare a language teacher for the reality of the classroom and to effectively teach the language. There is a widely held belief that these teachers are unlikely to have actually had the means to visit English speaking countries and lack the communication practice required to develop the command of a language. Experts have argued that it would be helpful to send teachers to travel to English speaking countries.

The shortcomings of language teaching in Brazil have resulted in a shortage of professionals who can speak English well. That limits contact between professionals, clients and suppliers and restricts international business opportunities. This affects the whole country - if Brazil is to function fully in the global arena it will need professionals better equipped with English.

4

How employers in Brazil approach English learning

Understanding the management models adopted by companies in Brazil is necessary for understanding companies' English learning requirements. Although what follows is a simplified model, it is a helpful way of understanding how a company's management style could impact on their choice of English course. Let us view two basic models: bureaucratic management and entrepreneurial management.

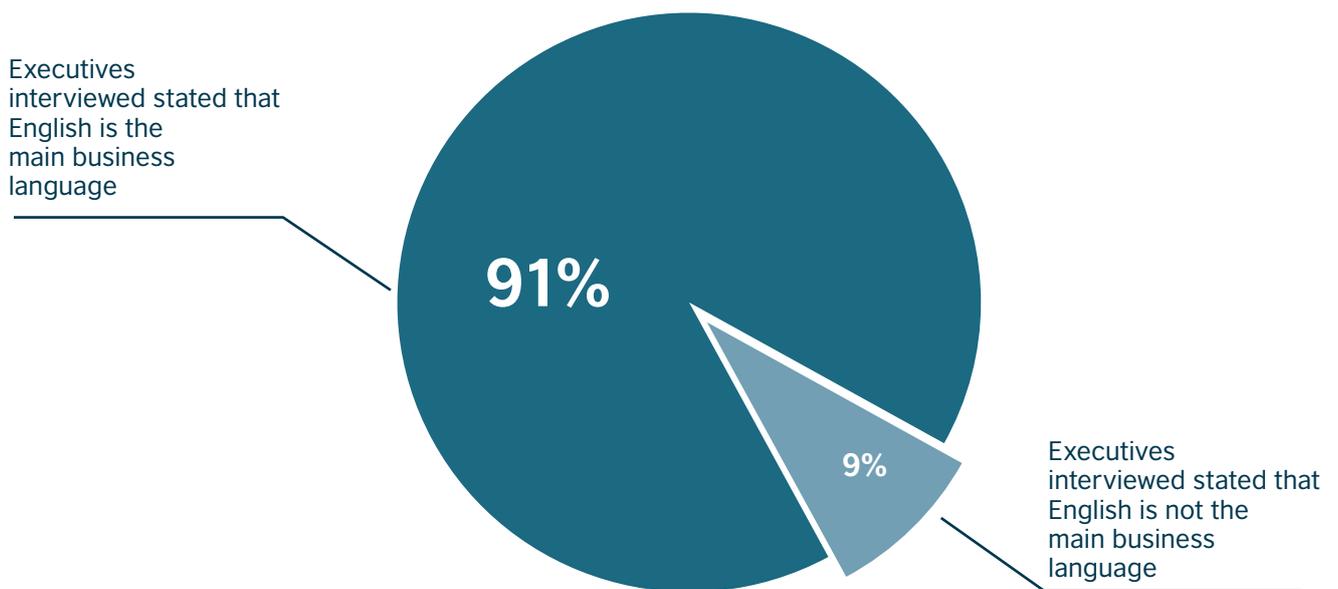
Bureaucratic management is based on obedience, whilst entrepreneurial management delegates more responsibilities. Companies that practice bureaucratic models tend to consider training more as an expense rather than an investment. They prefer hiring employees with previous knowledge rather than investing in qualification training courses. In general, they believe it's only worth investing in English in specific circumstances, with immediate practical

applications, and that the employees should pay for most of the costs themselves. To these companies, studies are a potential disruption to the work routine. They are not willing to provide time, space and resources for their employees to study English.

Such bureaucratic management companies tend to only set up partnerships with English schools in certain circumstances, namely: the company does not pay for the course directly; classes must be out of work hours and away from the company's premises. Consequently, partnerships often consist of obtaining discounts for employees - usually 10% - 20% of the monthly fee - which is granted according to the volume of students. In contrast to this approach, there is a minor trend in some sectors for companies to use incentive programs to encourage employees to improve their English.

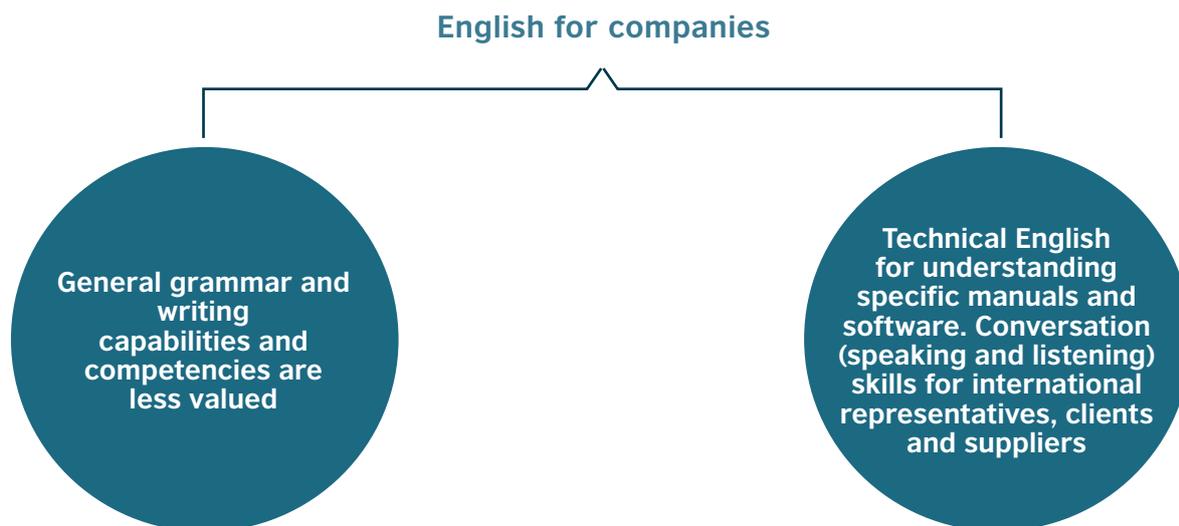
ENGLISH IS THE PREDOMINANT LANGUAGE IN INTERNATIONAL BUSINESS

Business English Index/Global English 2013 research with executives from 77 countries



Source: Data Popular based on Global English Corporation, 2013

DEMANDS AND PREFERENCES FOR COMPANIES



These demands and preferences vary significantly according to the company's professional sector

To attract bureaucratic management companies, an English language training provider needs to persuade the company's decision makers that there are clear, practical benefits from investing in an English course. As these companies tend not to value traditional courses, courses need to be tailored to the day-to-day needs of the corporation. It is essential to make the advantages of investing in improving their employees' English clear.

Entrepreneurial management companies, on the other hand, tend to value their employees' development. These companies aim to hire employees with existing skills and knowledge, but also help them to achieve new qualifications and consider the associated costs as medium to long term investments. While they tend to value the knowledge of English more than bureaucratic management companies, they still view it as an instrumental means to an end. They are more likely to buy in courses for their employees and to hold the courses on the company's premises during work hours.

Companies that adopt the entrepreneurial management model are often more willing to establish partnerships with English schools and to create learning and development objectives for their employees. These partnerships often involve

the company making partial or total payment for its employees. The quid pro quo for employees is that their performance will be monitored by their company and they will be expected to pass tests.

Entrepreneurial companies are more likely to sponsor English courses for their employees. English providers that respond to their individual corporate needs in bespoke ways tend to attract these companies with relative ease. Like the bureaucratic companies, entrepreneurial companies also value courses that are easy to apply practically but unlike them, they are open to courses which provide language training to a small proportion of their staff.

Despite the different views, both management models require a very practical type of English training, known as 'English for Specific Purposes' (ESP) or 'instrumental English'. Both management models require English courses tailored to the daily activities of their employees. Meeting the companies' needs means offering very distinct courses, such as the kind of technical English required to understand specific manuals, software terminology and conversation with international representatives, clients and suppliers. General grammar and writing capabilities are less valued.

In the tourism sector, the need to master English speaking and listening is particularly important for employees with a high degree of contact with foreign clients such as receptionists and resort managers. Their employers value classes that develop agility and the ability to improvise in communication. These workers often resort to makeshift communication – something observed in the answers received by our researchers in the Salvador market – but there is a demand to improve on this to facilitate better relationships with tourists.

The English language needs of industrial and technology firms vary according to the sector they operate in. Their employees are also likely to have different needs according to their role in the company. For example, in the operations department the requirement is for practical, technical and objective knowledge while in the sales department, conversation skills are more important.

These two applications of English - technical and conversation - overlap in financial companies. The sector needs employees that know how to communicate with a vast range of clients, including foreign ones. Having a good command of corporate language is important for internal meetings, while introducing clients and other agents requires a high level of competency in financial terminology. Having certain international clients may require knowing a language other than English.

Human resources departments acknowledge that speaking English can make the difference in a job application. They tend to test candidates' English levels via exams. However few companies view English as a 'must have' - they have to be realistic about the number of English speaking professionals in the market. They may value English, but they still hire many people who cannot speak it. There are some reported cases of employees who can speak English being paid more than others in the same role, but they are few and far between.

The size and nationality of the company has a bearing on the importance of English and how competent their employees need to be. Large multinational companies with foreign headquarters require English at all levels of the corporate hierarchy - from the receptionists to the directors. These companies need English for internal communications and interacting with clients and suppliers. This means that conversation courses tend to have a greater effect on the day to day working of large multinational companies.

DEMANDS BY SECTOR

Summary chart

Sector	Summary of the demands	Conversation	Technical
Tourism	Conversation for employees with the most contact with clients	●	
IT	Technical reading and writing tailored to the sector's terminology		●
Industry	Technical reading and writing for operations staff and corporate conversation for sales staff	●	●
Finance	Conversation with an emphasis on specific financial language	●	●
Human Resources	Development in all competencies to assess the candidate's English with oral and written exams	●	●

5

The demand for English courses

In order to understand the nature of the demand for English courses and how the existing supply is perceived, our study interviewed people who have taken or are taking an English course, as well as those that intend to take an English course in the next twelve months. Nine out of ten people interviewed had English classes in their basic schooling.

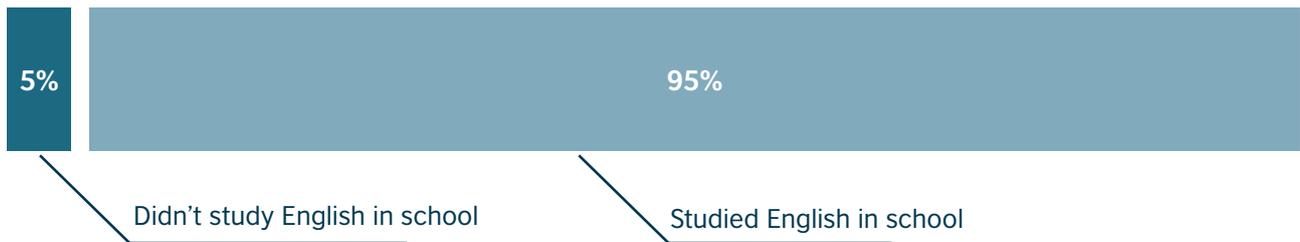
Language schools are the default option for learning English - 87% of those surveyed identified them as their preferred alternative. The remaining options were divided between private teachers (6%), courses at companies (3%), or at school in language study centres (2%), online courses (1%) or through textbooks and similar materials (1%). Most indicated that they had a 'basic' command of English - even amongst those who are currently

taking or have already taken an English course.

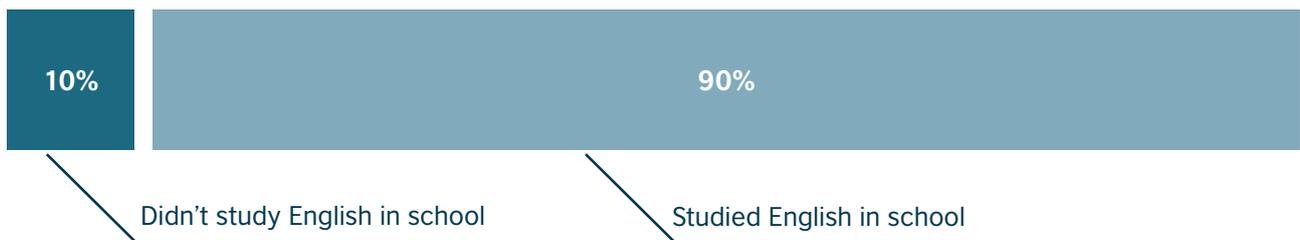
The main motivations for studying English are broadening knowledge and securing a job. Securing a job appears to be more important for those already studying (33%) than those who intend to study a language (16%). With regards to the question of whether studying English will improve earnings the situation is the reverse - 6% of those that already study the language believe their earnings will increase compared to 12% of those that intend to study in the future. In general, the respondents perceived English as indispensable to enter and progress in the job market - most believed that people who can speak English are better paid. There is also a perception that an employee who learns English will have a better chance of a salary raise and a promotion.

ENGLISH CLASSES IN SCHOOL (AGES 6 - 18)

Is studying/has studied



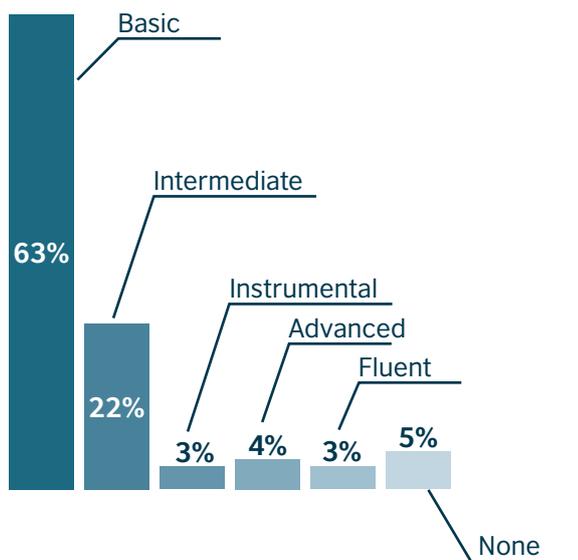
Intends to study



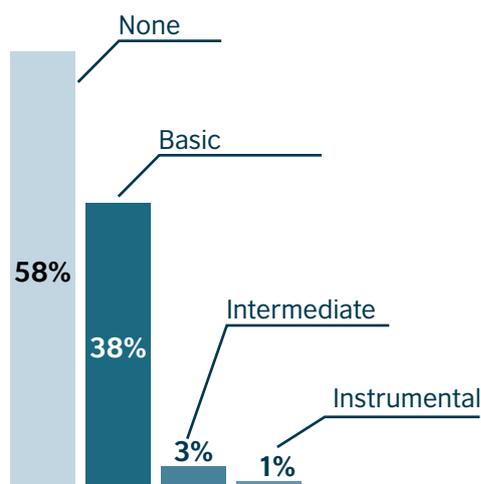
Q. Are you studying/have you studied English in school?
Base 720

THE PRESENT ENGLISH KNOWLEDGE LEVEL

Is studying or has studied English



Intends to study English



Q. And how do you rate your PRESENT knowledge level of the English language? Base 720

Those surveyed generally aim to improve their knowledge of English to improve their professional opportunities.

Respondents were asked whether employees that have taken an English course have better salaries. Of those who stated that taking an English course brings a salary improvement, most believed the gain to be above 40%.

Choosing to take an English course isn't easy. A lack of time and money are big obstacles to overcome. Learner's time is scarce - an English course has to compete with other activities that already take up a good part of their weekly schedule, such as work, university, leisure and family responsibilities. Generally, there is only time left over at weekends. Those who had already taken a course cited repeated absences and high prices as the main reasons for dropping out, although for those currently taking the course, dissatisfaction with the quality of the course may be a more critical factor.

Lack of time is also the main reason cited by those

not currently studying English. Among the B Class, 66% stated they did not have time to take a course; for those aged between 45 and 55 this rose to 73%. Here, the perceived lack of urgency to study the language is also a factor.

Lack of time and resources leads to people avoiding courses that seem slow-paced or lengthy. Of those that intend to start an English course, 88% say that it mustn't last more than two years. Among those that have taken or are taking an English course, 75% think it shouldn't last more than two years.

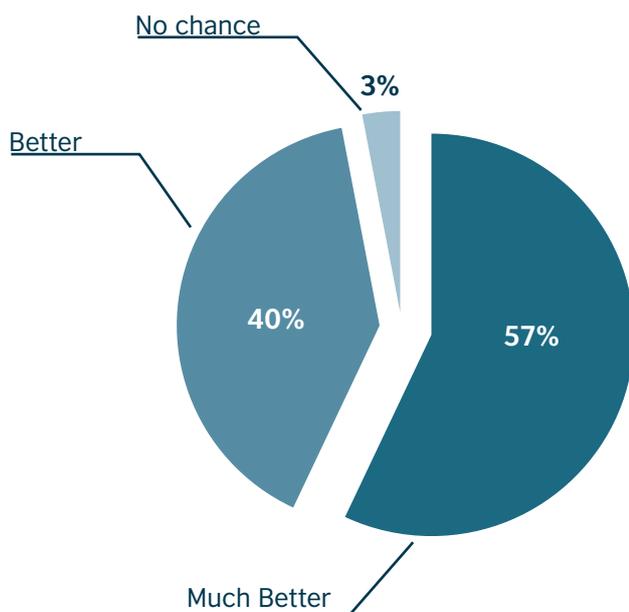
The impression of longer courses is that they are slow and ineffective and involve 'wasting a lot of time' on the basics. On the other hand, those surveyed do not respect courses which are too short and promise that they will teach conversation in six months. They tend to value courses which teach useful, adaptable English quickly - they are less concerned about perfect grammar. They think that some traditional schools are preoccupied with perfectionism which makes their courses slow and impractical.

As well as stating a preference for shorter courses the respondents also indicated a preference for better distribution of the time dedicated to studying throughout the week. Most indicated that in an ideal world classes would be up to two hours long, three times a week.

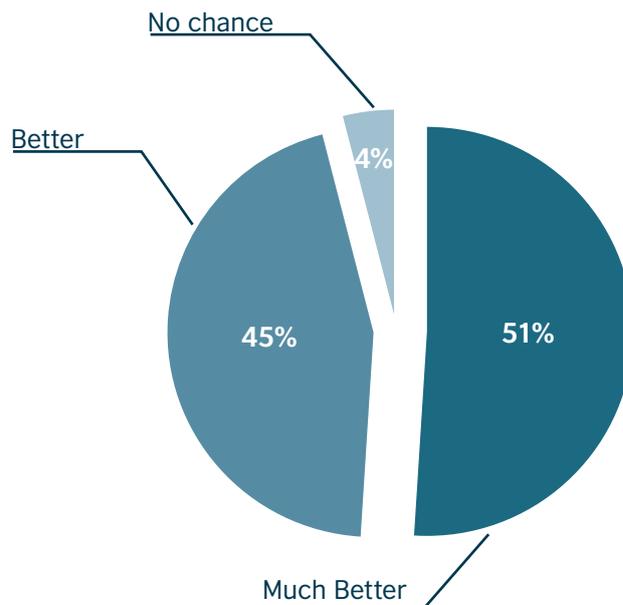
It is important to remember that English competes with other education expenses. With time and money limited, many choose to commit their time to a higher education course, which is considered the most efficient way of ensuring promotions and salary raises. If they had time and money to spare, these people might well choose to take other courses. As well as undergraduate degree programmes, specialist courses, conversion courses and MBAs are also viewed as creating a better 'professional return' than an English language course.

SALARY CONDITIONS OF THOSE THAT TAKE AN ENGLISH COURSE

Is studying or has studied



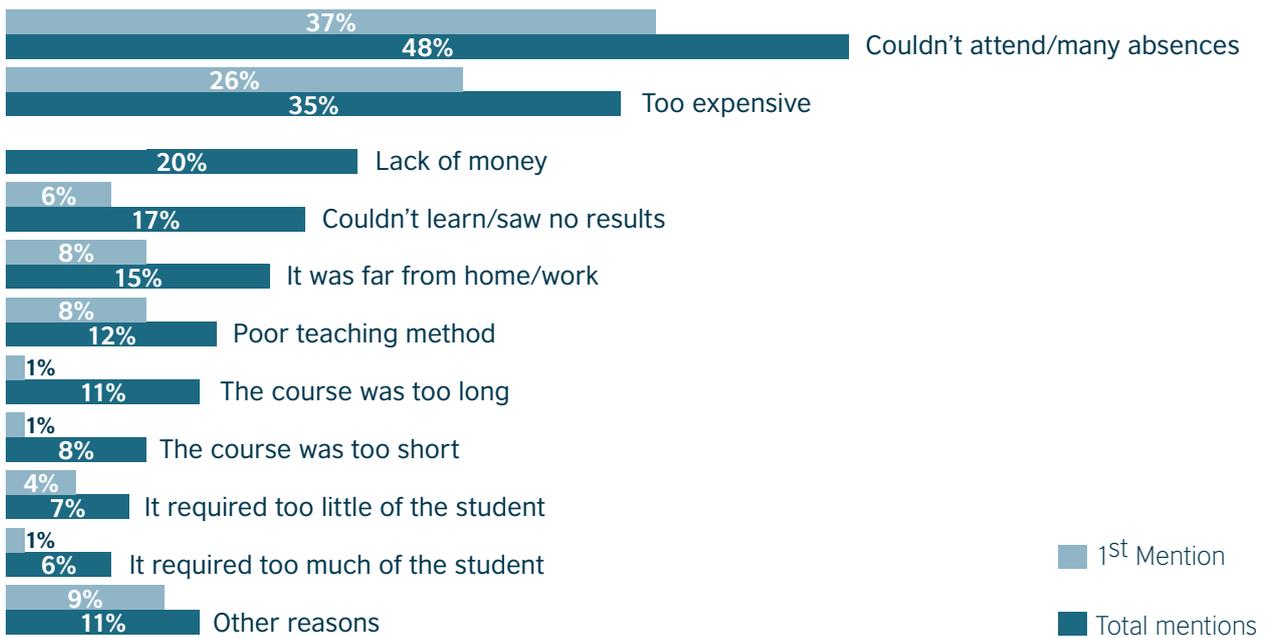
Intends to study



Q. In general, do you think taking/having taken an English course results in employees having a better salary? If affirmative, much better or slightly better?
Base 720

THE MAIN REASON FOR DROPPING OUT OF AN ENGLISH COURSE

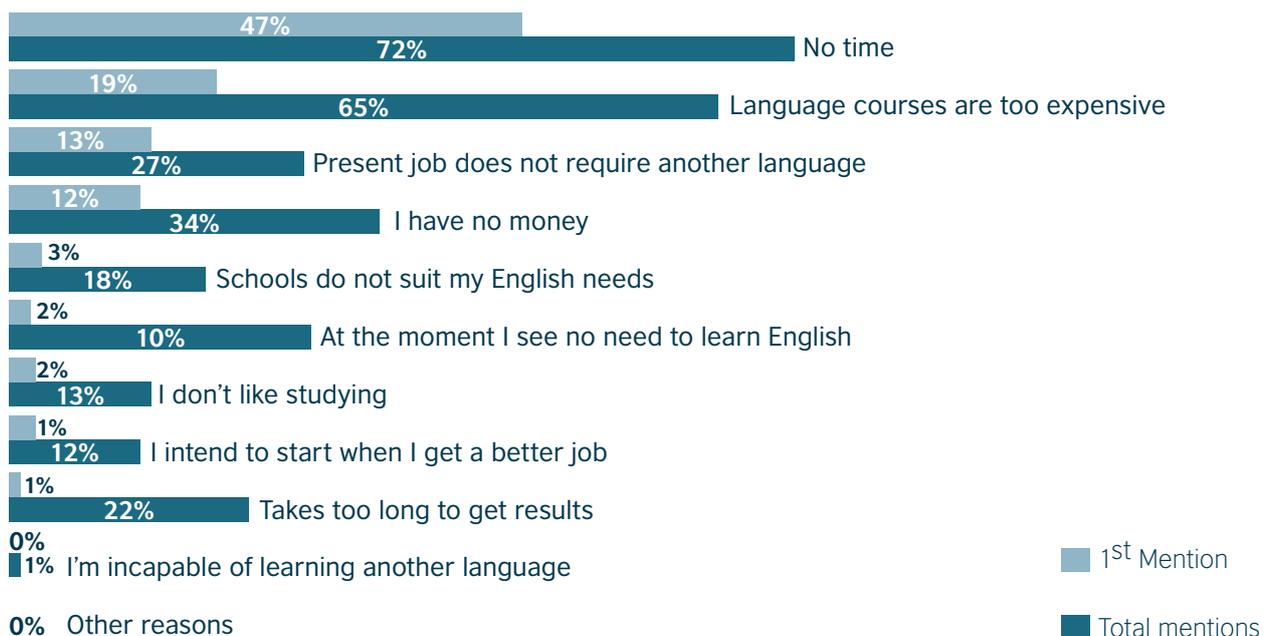
Among those that dropped out



Q. And what is the main reason that made you drop/ stop the course in the last English school where you studied? (single answer) What are the other reasons? (multiple answers)

THE MAIN REASON FOR NOT TAKING AN ENGLISH COURSE

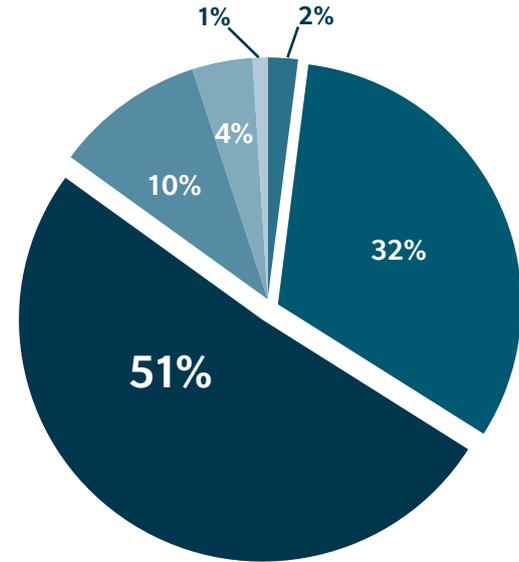
Among those that aren't studying English



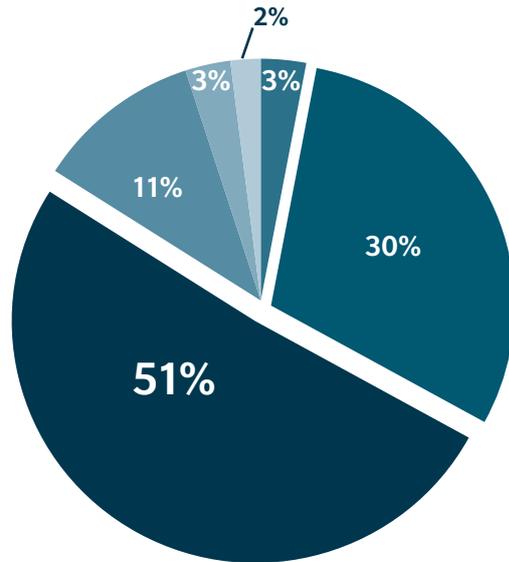
Q. And what is the main reason for you to currently not be taking an English course? And the second? And the third? Base: Intend to take one: 360

PREFERRED NUMBER OF DAYS A WEEK FOR AN ENGLISH COURSE

Is studying or has studied



Intends to study



- Up to 1
- 2 days
- 3 days
- 4 days
- 5 days
- 6 days or more

Q. How many times a week you think would be ideal to attend school? Base 720

PREFERRED CLASS DURATION

Is studying or has studied



Intends to study



Q. Regarding the duration of the class, what is ideal? Base 720

6

English learners and the four skills

When it comes to English language skills, reading is the most frequent activity - among those that already study and those that intend to, 76% read frequently.

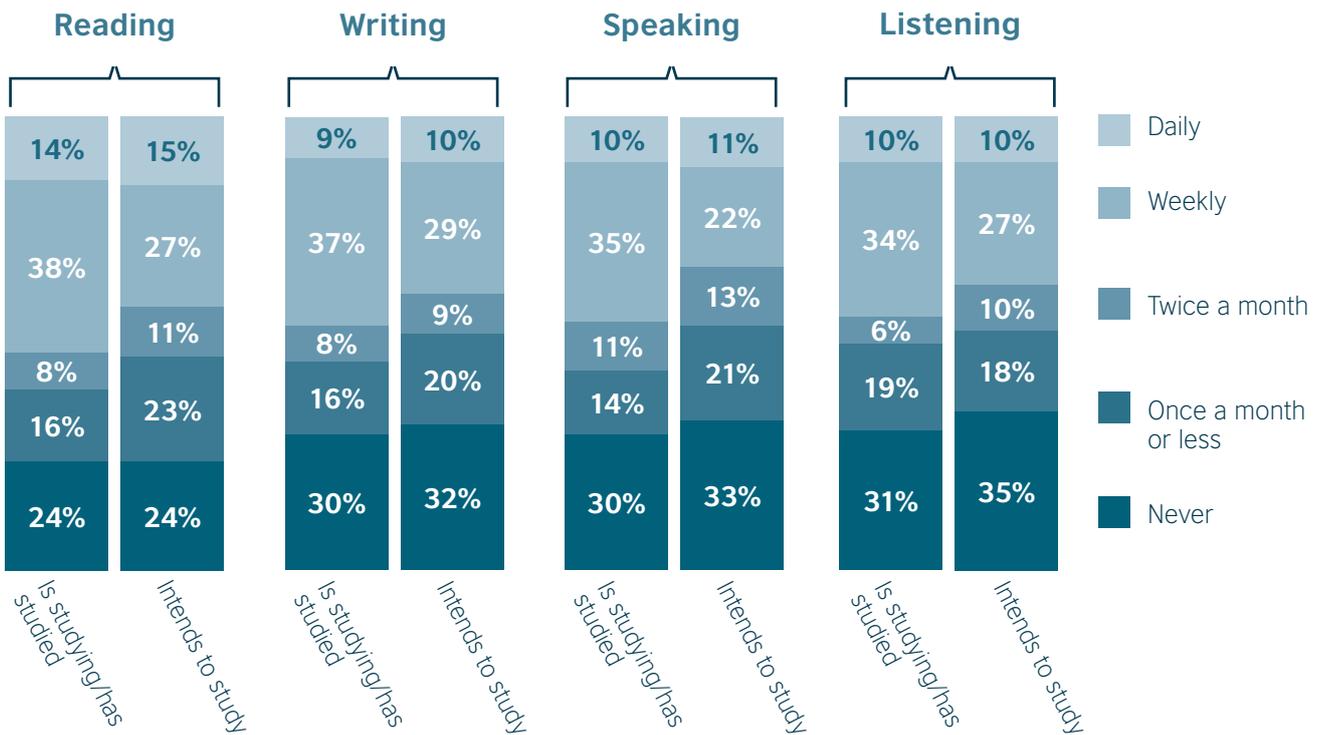
Many however, report difficulties with conversation and listening - even among those that have already studied or are studying English. The respondents' self-assessments show that the greatest difference between those that have studied or are currently studying English and those that intend to in the future is the skill of 'listening'. Those intending to study English considered this the area that they are least proficient in.

The perception that their speaking ability is insufficient led the participants to cite speaking

(50% of respondents) and listening (37% of respondents) among the skills that are most important to develop in a course. This is perceived to be more important than grammar. The preferred methods of teaching tend to be those that stimulate conversation; respondents prefer classes in English that "force" the development of the students' abilities. Respondents tended to think that this conversation should be stimulated before going in-depth into language and grammar rules. To them, the best way of practicing this is discussing current affairs directly relevant to their professional and personal lives.

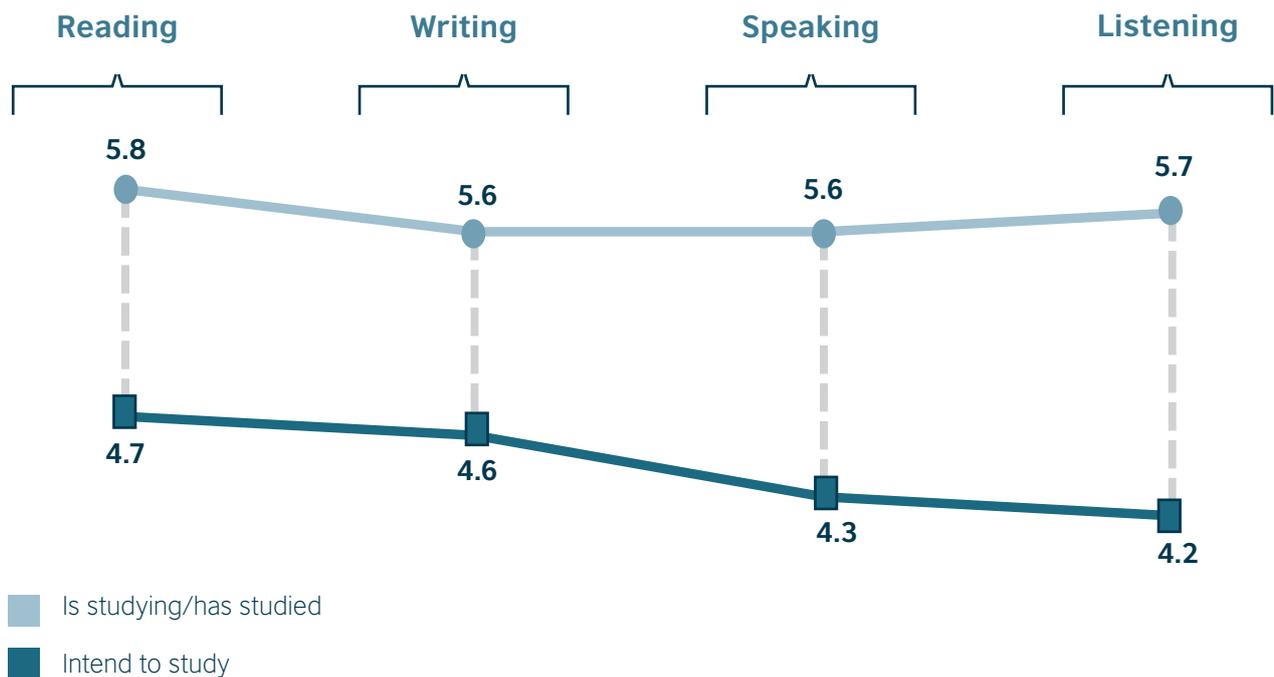
The reduced importance placed on writing and reading relative to speaking is also attributable to the availability of tools for written communication.

FREQUENCY OF USE OF ENGLISH SKILLS



Base:720

SELF ASSESSMENT OF LANGUAGE ABILITY



Q. Now, assessing each one of your competencies in the English language, how would you grade, from 0 to 10, where 0 means Terrible and 10 means Excellent, your CAPACITY of:
 Base 720

Alternatives mentioned in the research include translation software such as Google Translate, print and online dictionaries. Another factor is respondents' perception that in written dialogues there is more time to process information and less need to improvise.

It is interesting that the respondents' skills and their perception of English teaching dovetail with the employers' requirements. Both human

resources departments and the general public value conversation which fits the needs of the workplace. Both seek quick and efficient courses focused on speaking and listening combined with learning specific terminology, maximising the utility of the language.

7

Choosing an English school

The course schedule is an essential factor for those choosing an English school. For those that intend to take a course, flexible hours are the attribute they seek most. Those already studying are more concerned with the teaching methods and the quality of learning materials. In assessing value for money offered by English schools, three sets of criteria appear important: course price, teaching model and infrastructure, including classrooms, location, hours and multimedia resources.

It is preferred that the school be located close to home or work, particularly for females and youngsters, 50% of whom prefer a school near where they live.

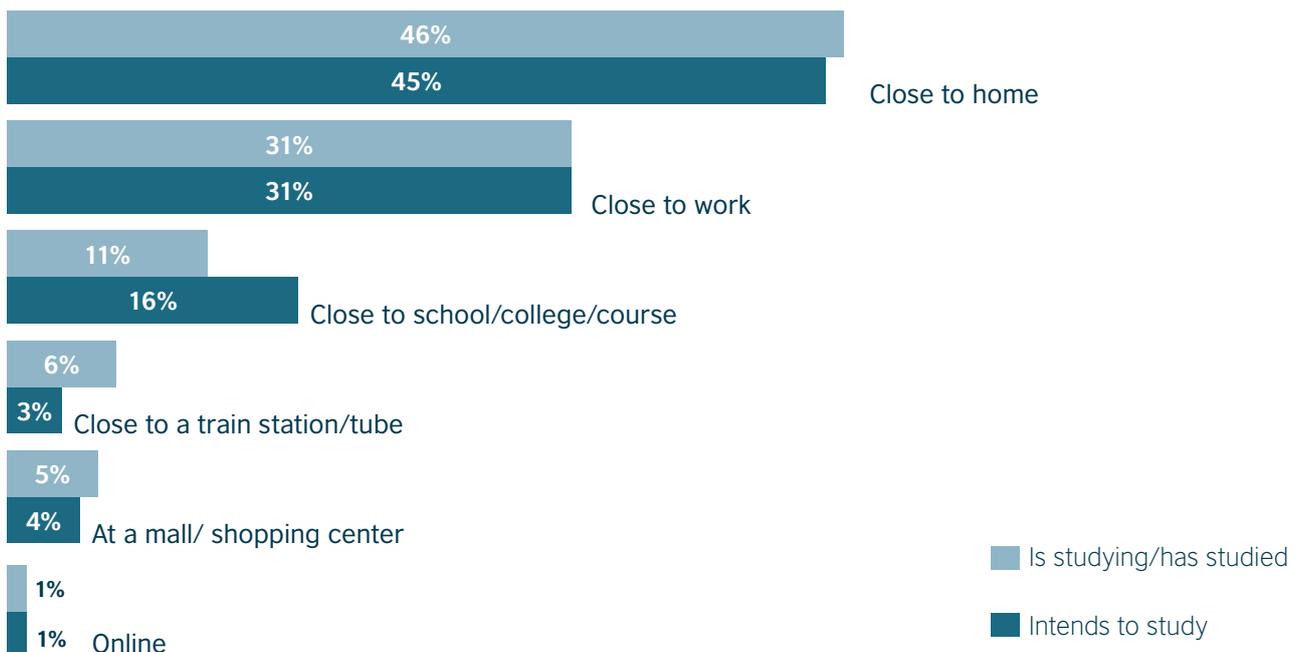
Another aspect of infrastructure is the class size. There is a perception that the number of students per class affects the quality of the course. Those surveyed

believed that smaller class sizes equate to more teaching time for each student. Classes with more than 14 students work less well in the respondents' eyes. This view is more entrenched amongst those taking a language course, 57% of whom prefer classes with 12 or fewer people. Those who are intending to take an English course are more accepting of larger class sizes - 58% are happy with groups of 12 or more people.

Flexible hours and availability of extra activities are valued above the teacher's professional qualifications.

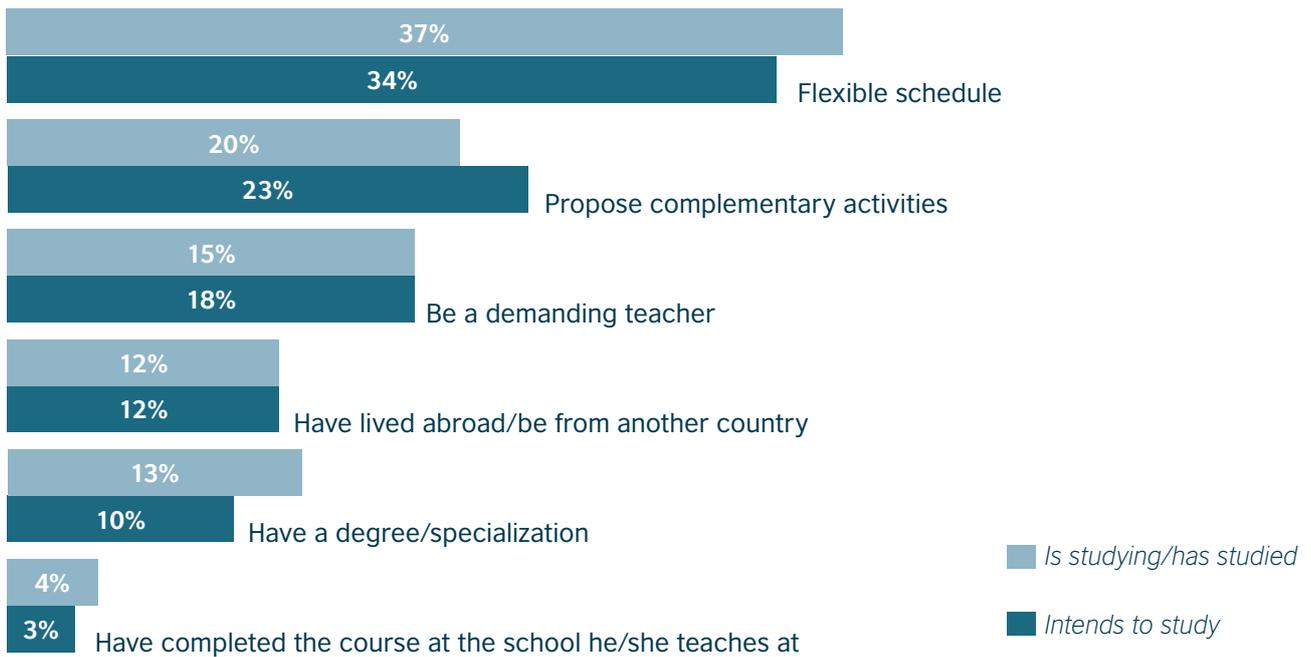
Teaching materials are important for maintaining a student's commitment to a course. Four out of every ten students state that low quality of support material may lead them to drop out of a course. This was more important than any other factor.

BEST LOCATION FOR AN ENGLISH SCHOOL



Q. What is the best location for you to pick a language school? Base 720

ATTRIBUTE YOU CONSIDER IMPORTANT IN AN ENGLISH TEACHER



Q. To you, what is the most important attribute that teachers at an English school should have? And the second? And the third?
Base 720

Conversation groups are cited as an important solution to learning problems. Teachers are expected to propose conversation groups to help with the students' speaking and listening problems. Another valued way of learning is through classes on specific subjects. Cultural and other enjoyable activities are also considered important, reflecting the feeling that classroom-bound learning is not stimulating enough. The list mentioned includes cultural activities, theatre classes, exhibitions, commemorative events and other dates that stimulate studies about the culture of English-speaking countries, such as Halloween. Those surveyed also mentioned dynamic classes with multimedia material, exhibitions, translation of and discussion of films and songs in and out of the classroom.

Respondents considered the main language schools in the country 'expensive'. The monthly cost of these schools represents between 20% and 52% of the average monthly salary.

Of those that had already studied English, six out of ten stated that they had paid a registration fee as well as having to pay for the teaching materials. Nearly 90% also stated that they bore the tuition costs. Adding all this up - most students' average

monthly English learning expense is over R\$ 480. To the respondents, this amount is well above what is considered ideal, both for those that have taken/are taking a course and those that intend to take one.

When choosing a language school, friends' suggestions are the most valued form of advice. After friends, come teachers. This could mean that 'student-recruits-student' approaches could be an important way of attracting new students to language schools.

8

Online courses

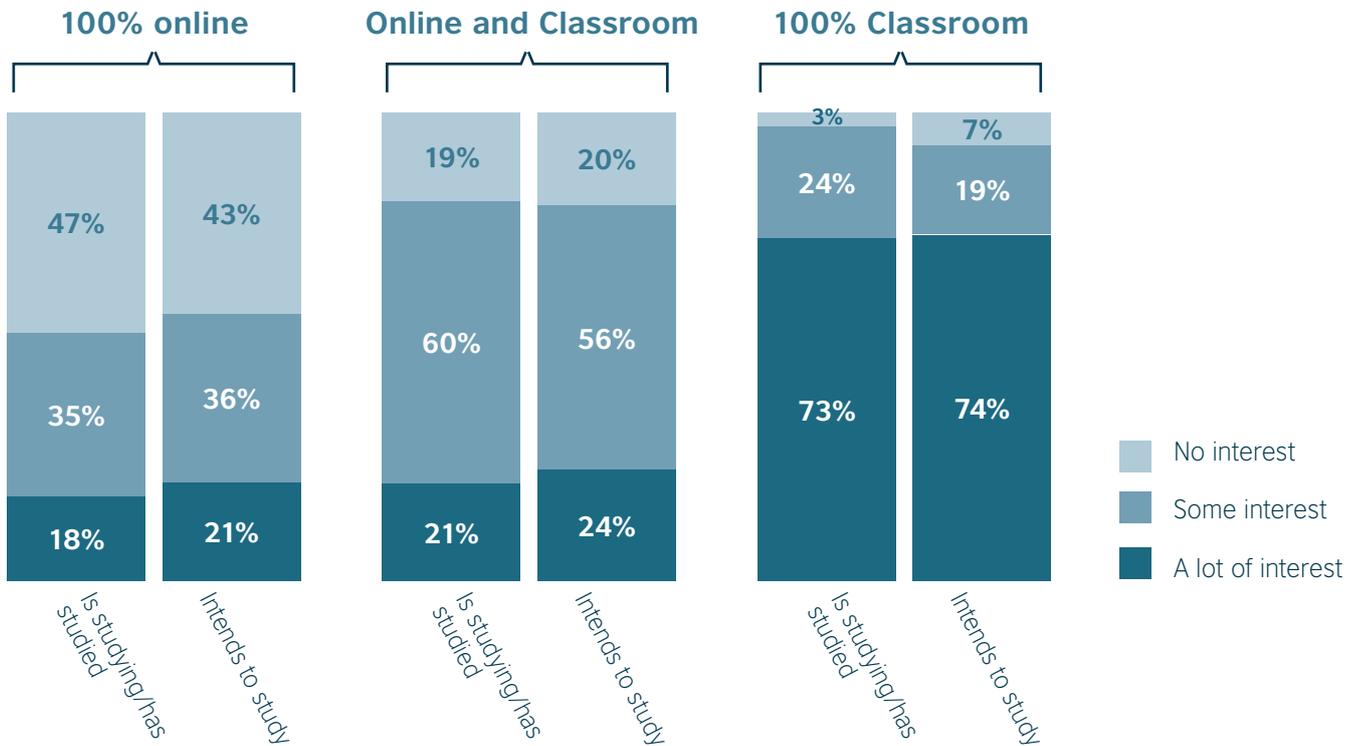
For a significant percentage of respondents, studying English via the internet was of interest. While most preferred a classroom-based course, over half displayed some interest in the the 100% online model.

The need to save time and money and to study at a time of your choosing makes the online course an attractive option. It appeals as a way of gaining extra support for a classroom-based course. But the lack of face-to-face contact with a teacher and the need for considerable levels of self-discipline are viewed as drawbacks of online courses. It follows that a physically present teacher and the required

commitment to the course are attractive factors for classroom-based courses. Consequently the value of online distance learning courses is still viewed with a little scepticism. The lack of an attendance requirement and other competing activities lead students to drop courses rather easily. On the whole Brazilians still prefer a 'face-to-face' relationship with their English courses.

However, classroom courses combined with good online support may still be attractive.

INTEREST IN THE ENGLISH COURSE FORMATS



Q. Considering the formats that may be offered for an English course, how interested would you be in each one of them?
Base 720

Within this blended model, the most valued components are:

- Exercises to practice writing and reading and exercises to practice speaking and listening
- Training in slang and terms used in social networks and the online world
- Availability of chat rooms and tools to speak English.

It follows that online support should try to make the most of what the web has to offer. A website with simple, easy and repetitive exercises, besides adding little to the learning experience, does not attract students. Another frequently made mistake is not being sufficiently concerned with learning specific internet language and not thinking about how best to use its tools to teach the language more effectively. To avoid such pitfalls, online support should offer ways to improve the four skills in original and fun ways. For example, using chat rooms (written and spoken) with the presence of Brazilian and foreign students - which helps the practice of pronunciation with different accents. Another dimension of this is the development of specific technical English classes to help students deal with virtual tools.

Conclusion

The ideal English course should have an affordable monthly fee and last for approximately two years. It should have dynamic classes delivered in English with work-related content, out-of-class activities and online support.

Despite being perceived as a good idea, Brazilians remain to be convinced about the value of online courses. Many believe they do not have the necessary discipline to follow a 100% online course.

The increase in demand for English courses among the new and growing Brazilian middle class owes much to their desire for English that can be practically applied in the workplace. They seek better employment prospects and social progression. A deeper understanding of the factors that are motivating this huge portion of the population to find ways to learn English is essential. This report shows that there is still much to understand, but should lead to significant readjustments of the characteristics of the courses already on offer.

