



Rebuilding the international market for UK English language teaching: a roadmap to recovery after Covid-19

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EXECUTIVE SUMMARY

Our industry has been devastated by Covid-19. We need to restore confidence in learning safely in English language teaching centres across the UK and get students back into our classrooms. To succeed, we must be bold, innovative and agile. And we must work together.

As the national association of UK ELT providers, we will lead our sector to recovery in 2021.

But everyone – English UK, ELT centres, government, industry stakeholders, the international education sector, global agents and partners – has a vital part to play to get our industry back on its feet.

Then we can aim higher: re-establishing UK ELT's global position and capturing new and diverse sources of revenue.

Work with us and together we will celebrate success once more.

PHASE ONE

In this phase we aim to restore international markets and return the UK ELT industry to 2019 student volumes by the end of summer 2022.

We will remind students and agents of the value, quality and innovation in our international education sector. And reassure them that studying will be Covid-19 secure and travelling to the UK will be easy after Brexit.

This will be underpinned by our market-leading statistics and intelligence.

At the same time, we will explore opportunities beyond in-country teaching, including bringing together multiple UK language centres and other partners to deliver international contracts.

PHASE TWO

After recovery comes growth. We will drive our industry's return to its position as global leader and open further sources of diverse revenue.

COST & DELIVERY

This will be delivered at minimum cost to English UK member centres by focusing our resources and working with partners in international education, government and at the British Council.

SCOPE

This plan outlines phase one. Our campaigning roadmap focuses on how the UK Government can help kickstart UK ELT.*

Both papers will be reviewed and updated with detailed activity plans as the specific routes to recovery become more clear.

* Teaching English to the world: how the government can help kickstart UK ELT after Covid-19, 20 July 2020

OUR COMMITMENT

1. USE EVERY OPPORTUNITY TO PROMOTE UK ELT TO KEY AUDIENCES

We will use every opportunity to promote UK ELT to carefully researched key audiences.

We have identified five key audience groups and will use our industry-leading intelligence to identify additional groups and constantly evaluate our primary targets.

We will also run events to give English UK member centres the opportunity to connect with key market representatives. We will evaluate and refine all our activities to ensure their effectiveness.

2. PRODUCE EFFECTIVE MESSAGING THAT CELEBRATES AND REASSURES

We will produce simple, direct messaging promoting UK ELT to all audiences. We will share clear messaging and ready to use assets with relevant stakeholders to ensure they have a wide reach and remain strong and consistent.

3. USE ALL RESOURCES AND CHANNELS FOR MAXIMUM REACH

We will use all resources available to us through our stakeholders and partners to give our messaging maximum reach. This will include sharing and leveraging expertise, communications channels, funding and diplomacy.

WHAT WILL SUCCESS LOOK LIKE?

Our goal is to return English UK member centres' student volume to the 2019 level by the end of Q3 2022.

We will use our quarterly statistics scheme (QUIC) to measure our success.

This goal is more ambitious than the expectations of English UK member centres that took part in our Covid-19 impact research in summer 2020.*

Respondents expected some recovery in 2021, with most anticipating 60% of the volume of business prior to the pandemic.

60% of pre Covid-19 volume was seen as a baseline for 2022. Just under half of UK ELT providers anticipated an 80% recovery and a third expected a return to pre Covid-19 business levels.

We will work with our insight partner Bonard to gather the data we need to monitor progress. This roadmap will be complemented by internal targets. These will be SMART: specific, measurable, achievable, realistic and timely.

Once we have reached our goal, we will move on to a second phase: to return to the position of global market leader. We will produce a plan outlining this second phase.

* Impact of Covid-19 on the English language teaching sector in the UK, English UK/ Bonard, July 2020



BACKGROUND

The UK welcomes half a million English language students to its classrooms each year, injecting £1.4 billion into the nation's economy and supporting 37,000 jobs.

In 2019, 510,000 international students studied at English UK member centres for a combined 1.8 million student weeks.*

As part of the tourism industry, UK ELT has been particularly badly affected by Covid-19. Research by our insight partner Bonard found a loss of around half a billion pounds to English UK member centres as a result of Covid-19. The loss to the wider economy is unknown. Over 90% of the industry's employees have been adversely affected.**

English UK has published a kickstarter policy paper† outlining the government actions we need to create the optimum operating environment for industry recovery.

This roadmap to recovery will enable us to maximise every opportunity, identifying possible openings, seeking new markets and ensuring every industry stakeholder understands the role they have to play.

The road forward is neither straight nor predictable, so agility is key and the plan will adapt and change.

* Student Statistics Report 2020: English language students in the UK in 2019, English UK/ Bonard, May 2020

** Impact of Covid-19 on the English language teaching sector in the UK, English UK/ Bonard, July 2020

† Teaching English to the world: how the government can help kickstart UK ELT after Covid-19, 20 July 2020

PHASE ONE

OUR AUDIENCES

We have identified five groups that have been, or could be, major UK ELT customers.

These partners, study abroad agents, educational tour operators (ETOs), students and buyers will be the focus of our positive messaging and marketing campaigns around UK ELT and studying in the UK in phase one.

AUDIENCE 1. Established EU market agents and ETOs focused on UK ELT

The UK had high penetration in the EU before Covid-19. 36% of student weeks for English UK member centres came from the EU in 2019, although its global market share is just 15%.* High numbers of junior students mean this market is dominated by agents.

Challenges:

- Brexit's potential impact on travel, visas and perception of the UK as hostile.
- Fear of travel and continuing uncertainty due to Covid-19.

AUDIENCE 2. Established non-EU market agents and ETOs focused on UK ELT

The top sending markets outside the EU in 2019 were China, Saudi Arabia, Turkey, Japan, South Korea and Brazil.

Students' average length of study is much longer, making these markets critical to business recovery as students begin to travel again.

Challenges:

- Increased competition from Canada, Ireland, Australia and probably the US under President-elect Joe Biden.
- Fear of travel and continuing uncertainty due to Covid-19.

AUDIENCE 3. Emerging market agents and ETOs not yet focused on UK ELT

As well as maintaining and strengthening key student source markets, UK ELT must engage new markets and/ or revive declining markets.

Vietnam, Colombia and Mexico and some elements of the Japanese and Brazilian markets are critical: statistics show UK ELT has a low market share in these countries.*

Challenges:

- Local understanding of work rights and visa routes can generate resistance.
- Significant competition from destinations with higher penetration in these markets, including Canada and Australia.

AUDIENCE 4. Students interested in long term study in the UK

Covid-19, Brexit and the UK Government's International Education Strategy could create opportunities for ELT to re-establish its role as the access point to the diverse study routes available in the UK.

The UK international education sector is struggling with the fallout from Covid-19: to support recovery of the whole sector we need to speak with one voice with colleagues from the British Council, the UK Government and other key stakeholders.

Challenges:

- Competitor markets have a headstart on positive messaging to this audience.
- Fallout from Brexit and the challenge to the UK's higher education sector.

* Student Statistics Report 2020: English language students in the UK in 2019, English UK/ Bonard, May 2020

PHASE ONE

OUR AUDIENCES

AUDIENCE 5. Buyers interested in partnerships beyond traditional onshore recruitment

Transnational education, capacity building, digital and resources are just a few examples of non-traditional, and previously under-utilised, opportunities for the UK ELT sector.

These opportunities are important in both the short and long term. English UK member centres may initially supplement what could be a slow return to in-country teaching and then continue to diversify their income sources, and create more sustainable and robust businesses.

Covid-19 has taught us to prepare for the possibility of disruption in the study abroad market and for further stagnation or decline in key student source markets.

Challenges:

- The competitiveness of the global marketplace.
- Market access issues and difficulty in accessing opportunities.
- Lack of experience in the UK ELT sector delivering large scale projects or consortium bidding.



PHASE ONE

OUR MESSAGE

We have a great story to tell. The UK is a safe, fun and accessible place to study and we offer high quality and innovative international education opportunities.

Our messaging will centre on Covid-19 and reassurance after Brexit, as well as the strength of UK English language teaching and international education more widely.

We will create content in these areas, as well as simple messaging and assets that our stakeholders can use with our target markets.

SAFE AND SUPPORTIVE

The impact of the pandemic is ongoing and Covid-19 will continue to influence student mobility in the first phase of our recovery. Concerns around personal safety, consumer confidence and trust in the sector must be addressed.

Top line messaging

- UK ELT puts student wellbeing first.
- The UK is a world leader in safeguarding young learners.
- As part of Accreditation UK, independent inspectors check that children receive extra care and safeguarding procedures are in place.
- Comprehensive Covid-19 secure guidance enables English UK member centres to operate safely.
- UK ELT is robust and resilient.
- The UK is open and welcoming to international students.
- UK ELT offers innovative online and blended courses so students can continue to study.



OUR MESSAGE

UK ELT IS (STILL) THE BEST CHOICE

Competition in ELT has never been fiercer. Students have a choice of English language speaking destinations as well as an increasingly professionalised local offer. We must show prospective customers that studying English in the UK is their best choice.

Top line messaging

- The UK offers the largest and most diverse range of ELT courses in the world – there is something for everyone.
- The UK is the most popular destination for studying English in the world.
- UK ELT is forward looking and innovative.
- UK English language qualifications are internationally recognised and valuable.
- ELT students can experience all the UK has to offer as a destination.
- UK ELT has the most robust quality assurance scheme in the world – a benchmark for quality.
- Every teacher at an accredited UK ELT centre is appropriately qualified.
- UK ELT maintains high teaching standards. Every teacher is observed in accredited centres.
- Every aspect of running an accredited UK ELT centre is inspected.
- Our accreditation scheme, Accreditation UK, is run with the British Council.
- All ELT students get the protection of learning at an accredited centre, no matter how short their course is.
- UK ELT supports its international partners, study abroad agents and educational tour operators.

A KEY ROUTE INTO UK EDUCATION

UK ELT leads students into higher education, the independent school sector and other UK education. We need to emphasise the benefits of this route for students and how the value of a UK ELT experience adds to a UK HE, FE or independent school experience.

Top line messaging

- UK ELT underpins the whole end-to-end UK education offer.
- UK ELT provides the best route into a UK university or other world-leading education institution.
- UK ELT offers access to a world class UK curriculum.

SIMPLIFIED STUDENT IMMIGRATION

The new immigration system simplifies access to studying English in the UK for many students. But language around immigration can be difficult to digest. Our simple messaging will emphasise that leaving the EU has not made things more difficult and the UK Government welcomes students to the UK.

Top line messaging

- It is now easier for international students to study a short course in the UK.
- Visitors can travel and study in the UK for up to six-months – there is more flexibility under the new system.
- It is now easier to transition from one course to another in the UK.
- It is still easy for EU students to travel to the UK to study English without a visa.
- The UK Government welcomes you to study English in the UK.



PHASE ONE

OUR CHANNELS

English UK is the voice of UK ELT.

We will lead and support multi-channel campaigns; organise and participate in international events; and use our strong relationship with stakeholders, including the Department for International Trade and the British Council, to deliver our message.

The channels we use for messaging will be diverse, allowing us to reach the largest possible audience in a variety of ways.

INTERNATIONAL STAKEHOLDER EVENTS

English UK will have a presence at the most relevant agent, buyer and student-facing stakeholder events.

We will use these events to communicate our messaging through visual presence, presentations and one-to-one business meetings with contacts from our five key target audiences, answering questions, providing reassurance and deepening our understanding of their concerns and needs.

ENGLISH UK EVENTS

We will use our extensive experience to organise events that address and engage key target audiences, including StudyWorld, StudyWorld Summer and the China Roadshow.

EXAMPLE: STUDYWORLD SUMMER

This agent-facing event is organised by English UK and includes B2B meetings, seminars and presentations. It communicates the key message that the UK is the number one destination for safe, quality summer courses.

English UK works in partnership with the British Council, the main sponsor. The event is supported by the DIT and the Education is GREAT brand.

The DIT brings a delegation of interested buyers and promotes the event through its channels.

Promoting the event, English UK uses its social media channels and emphasises that UK businesses want to meet agents to create student recruitment partnerships.

PHASE ONE

OUR CHANNELS

PROMOTIONAL AND INFORMATION SHARING CAMPAIGNS

We will use existing and new digital channels, and our messages will be amplified by established partner channels, such as the British Council's Study UK, to reach and engage our target audiences.

Government channels are enormously influential and we will work with the DIT to involve UK Government officials in delivering key messages wherever possible.

CROSS SECTOR UK-FOCUSED ACTIVITIES

We will propose and deliver innovative events with industry partners, such as the British Council, the DIT and the Education Sector Advisory Group. The ESAG is comprised of representatives from HE, FE, schools, early years and edu-tech sectors.

Together we will create new opportunities to engage with key audiences and promote the whole UK international education offer.

EXAMPLE: AN INFO SHARING CAMPAIGN

English UK will communicate changes in the new immigration system to students and agents.

We will position government officials in front of students and agents at events, such as StudyWorld, and in webinars to directly communicate with our target audiences.

We will support these reassuring messages on English UK social media channels, demonstrating that government officials are approachable and that the UK Government supports international students.

These reassuring messages will lead agents and students to choose the UK over competitor nations.



PHASE ONE

ENSURING SUCCESS

DATA DRIVEN AT EVERY STEP

It is vital that we are able to monitor and react to patterns of recovery and emerging trends throughout our work helping rebuild the international market for UK ELT.

To do this we will regularly collect data from English UK member centres and will refine our activities as informed by rigorous market reporting and intelligence.

In addition to our quarterly reports on student mobility (QUIC) and annual statistics reports, we will commission longitudinal studies on the market in partnership with the British Council and insight experts Bonard.

This will begin with our report on Europe as a source market in 2021 and beyond.

This bespoke research will combine quantitative surveys of education agencies and UK ELT providers with in-depth interviews. The report will provide insights on our messaging and audiences and support members with navigating any changes in demand from this key market.

REBUILDING ELT FOR THE BETTER

It must also be noted that the Covid-19 pandemic did not occur in a vacuum.

Our commitment to UK ELT's international market recovery sits alongside our commitment to creating a 'new normal' that is fairer, safer and better for everyone.

This means working together to become an antiracist and greener organisation and industry.

BUILDING A COALITION FOR SUCCESS

The aim of this plan is ambitious. To work, it needs a dedicated coalition of leaders from across the UK international education industry.

Initial discussions with major partners during the development of this plan suggest a strong willingness and drive to take this forward as early as possible. And, crucially, to work together even more closely and creatively than in the past.

We are therefore optimistic about the prospect of creating the kind of recovery that our sector – from the family run language school to the largest teaching chains, colleges and universities – desperately wants and needs.



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