

Europe Future Outlook

EUROPE AS A SOURCE
MARKET FOR UK ELT
IN 2021 AND BEYOND

Research paper
June 2021



In partnership with



Prepared by

BONARD

Europe Future Outlook

EUROPE AS A SOURCE MARKET FOR UK ELT IN 2021 AND BEYOND

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Introduction

The UK as an English language teaching (ELT) destination finds itself in transformative times. In addition to facing the ongoing pandemic, the sector is preparing for the possible impact of the new points-based immigration system. Both developments are expected to have a profound impact on student mobility from Europe to the UK.

The objective of this research is to assist accredited UK ELT providers, English UK and the British Council to understand the recruitment potential from Europe in the coming years, navigate through the current circumstances and establish feasible recruitment strategies and capacity planning going into recovery.

For the purposes of this research, 'Europe' or 'European countries' refers to the following selected European countries, based on their sending power within the ELT sector to the UK: Austria, Belgium, Bulgaria, Czech Republic, Denmark, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, The Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden and Switzerland.

Based on English UK's 2019 Student Statistics Report, 60% of all English language learners studying at English UK member centres came from the 20 above-mentioned European countries that year.

Cumulatively, they accounted for 38% of all student weeks delivered.

The report summarises the results of a six-month multifaceted research exercise and provides a deep dive into the most promising target audiences and demand levels, market recovery scenarios, priority markets as well as preferred marketing and recruitment approaches. By collating first-hand information from more than 250 organisations, the report lays the foundation for UK stakeholders to undertake informed decision-making.

As the stream of adult and junior students from Europe will face different trajectories in the upcoming period, strategic product development and coherent communication will be vital to enable the UK to better position itself in the global context. Dealing with the roadblocks and implications of the Covid-19 pandemic and Brexit will be key to ensuring the UK remains both competitive and sufficiently flexible to react to emerging customer needs.

Acknowledgements

BONARD would like to express their gratitude to all English UK member centres, British Council representatives and education agencies for contributing to this study by sharing their views.

Methodology

This research was conducted by BONARD, an independent market research firm specialising in international education. BONARD is a UNWTO Affiliate Member, with chief research officers being individual members of ESOMAR World Research.

THE STUDY BUILDS ON MULTIPLE RESEARCH METHODS, AS OUTLINED BELOW.



DESKTOP RESEARCH

This research draws on existing student mobility resources, such as English UK's membership statistics. Additional secondary research was undertaken to collate information from, inter alia, government bodies, provider and agency associations, service providers, and industry and non-industry media, all of which helped capture the current market environment.

to the UK, their first-hand insights are invaluable in assessing both the status quo as well as where the market is headed. While agency operations and, consequently, the availability of executives were considerably impacted by the ongoing Covid-19 pandemic, the research team made every effort to gather a representative sample of 100 respondents*.



SURVEY OF ACCREDITED UK ELT CENTRES

One of the pillars of this research is a quantitative survey of UK ELT providers. A total of 145 centres provided data*, which constituted a strong response rate given the challenging circumstances in which they were working, such as difficulties accessing internal data.



IN-DEPTH INTERVIEWS

A series of qualitative interviews with English UK member centres, pre-selected education agencies from European countries and industry experts such as local British Council representatives were held to acquire soft intelligence pertaining to emerging trends. The agency selection was also informed by input from English UK member centres. A focus was made on respondents with a proven track record of working with large volumes of students from European countries, being the best positioned to provide insights into the future of the European region.



SURVEY OF EDUCATION AGENCIES

The research also quantified market preferences across the main European source markets. As education agencies send the majority of students coming

* Data collection was conducted between February 2021 and May 2021.

Executive Summary

In 2019, both UK ELT providers and agencies were busy developing contingency plans and recruitment strategies for when the UK left the European Union. However, the outbreak of Covid-19 in 2020 shifted the sector's focus, and resources were repurposed to deal with the immediate impact of the pandemic. Adjusting to the new reality in 2021 and beyond will require recruitment strategies for European countries to be revisited.

This report builds on primary research conducted with 145 English UK member centres and 100 education agencies in selected European countries. In addition, 44 in-depth interviews with market leaders and industry insiders were carried out. These helped evaluate and analyse the feedback on best practices for navigating through the simultaneous occurrence of an ongoing pandemic and Brexit, both of which will affect mobility from Europe in the long term.

The research was conducted by BONARD, an independent market research provider specialising in the international education sector.

THE STUDY IDENTIFIES AND QUANTIFIES A NUMBER OF KEY FINDINGS:

- Europe constitutes the key source market for UK ELT member centres. Based on English UK's Student Statistics Report 2020: English language students in the UK in 2019 (as per the last snapshot prior to the Covid-19 outbreak), a total of 303,620 students from the 20 selected European markets that were covered by this research studied English in the UK in 2019. Cumulatively, they generated 705,451 student weeks. As a result of the pandemic, student numbers from these markets fell by 89% between 2019 and 2020. Meanwhile, student weeks declined by 80%.
- The research indicates important shifts might be on the horizon. The findings show that 62% of UK ELT providers consider Europe to be their dominant source of English language learners and believe it will remain so for the foreseeable future. However, 22% of language centres are contemplating a move of focus to new markets.
- Furthermore, while 54% of surveyed agencies see the UK as the primary study destination for their English language students, 29% of them anticipate that the UK will give way to other destinations. The most often cited reasons were the additional costs generated by visa requirements and other financial considerations (health insurance and tuition levels in general). It was expected that European students looking for longer-term studies would be the segment most inclined to opt for another ELT destination.
- For Q3 2021, the enrolment of international students in UK language centres has been determined by the UK's 'roadmap out of lockdown' and national green, amber and red country travel lists. These are poised to divert demand for English language courses towards Malta (given that students from European 'amber list' countries would need to quarantine upon arriving in the UK). However, this is viewed as a short-term rearrangement rather than a long-lasting market preference.
- Education agencies in Europe anticipate they will regain 21% of bookings to the UK in 2021 compared to 2019. Going into 2022, they expect to reach 58% of bookings and for 2023, they estimate they will be able to achieve 82% of pre-pandemic levels.
- Agencies stated that the handling of the pandemic in its later stages, coupled with the high pace of the vaccination rollout, improved the image of the UK as a study destination. This was especially true for Portugal, Switzerland, Poland, France and Germany.
- The research shows that the impact of Brexit is still uncertain and perilous. On average, agencies predicted a decline of 31%; however, that prediction rose to more than 50% among 22% of agencies. It may take two years for customers' confidence in the UK to be restored fully in the wake of the pandemic and because of Brexit-related perceptions among adults and juniors.
- Specifically regarding adults, both the UK ELT providers (54%) and education agencies (48%)

expect the number of students from Europe to continue to decline. According to 39% of language centres, there is room for growth in Europe in the adult segment, 32% think otherwise and the rest of providers do not know.

- Potential growth opportunities within the adult segment are tied to marketing to the 17–18 and 50+ age groups. The former group of prospective students was deprived of travel for more than a year, and their parents are more willing to allow them to travel than parents of younger students. The 50+ cohort, on the other hand, represent a solid stream of students distributed throughout the whole year thanks to their disposable income and spare time.
- In the view of education agencies, the return of work rights would appeal to European students who want to gain practical work experience in the UK. The reintroduction of work rights could stimulate demand levels within the respective target audience by up to 30%.
- For juniors, the biggest growth potential is seen in the 12–16 age group. Moreover, as the junior student population coming to the UK will gradually become younger, most visible gains are expected in the 12–13 age band. The 8–11 cohort is expected to grow as well.
- Young learners are increasingly interested in products that are more academically or professionally focused. General English courses will gradually cater to younger segments with lower English proficiency levels, while English for Academic Purposes and English for Specific Purposes will meet the needs of result-oriented juniors who are also looking for extra-curriculum activities.
- For both age segments, flexibility and a diverse product portfolio will play an important role going forward. 51% of UK ELT providers think growth will be driven by more specialised courses and 48% see a need to develop a more flexible delivery model. The survey of agencies confirms this, with 76% of agencies claiming there will be an increase in demand for value-add courses among their customers.
- The traditional promotional focus on the UK as 'the home' of English language, British culture and on the quality of education in the UK should be enhanced by a dedicated campaign promoting the UK as an ELT destination for young learners.
- The research found evidence of a lack of information and hence understanding of the new visa system among prospective students. Easy-to-understand and engaging marketing campaigns to share positive messaging on visa changes (for instance, that there are no changes for short-term study) will be required. The most effective channels were identified as dedicated support (personnel) for visa-related queries (49% of providers), joint awareness activities with agencies (49%) and social media promotion (48%).
- The research also established that while demand for the UK is expected to decline post-Brexit, neither education agencies nor the interviewed stakeholders expressed concerns related to the new requirement to travel to the UK with a passport. For juniors, travelling with a passport has been an established practice. Similarly, taking into account the overall cost of an English language course in the UK, the financial and time requirements related to obtaining a passport are not perceived to be an issue.
- Going into recovery, education agencies are viewed as the key booking channel for the UK ELT sector. As many as 53% of providers see agencies as 'very important' and 40% consider them 'important' in the recovery process. Direct bookings follow closely, constituting a 'very important' channel for 50% of language centres. While for providers focusing on the junior segment, cooperation with agents will remain at the core of business development, for centres catering to adult students a slight shift towards direct booking is expected (10%–15% of bookings).

EUROPE GENERATES 60 % OF ALL ENGLISH LANGUAGE STUDENTS AND 38 % OF ALL STUDENT WEEKS SPENT IN THE UK.

Europe as a Source Market for the UK ELT Sector

Based on English UK's 2019 student statistics data, Europe generates 60% of all English language students and 38% of all student weeks spent in the UK. In 2019, 303,620 students from these markets studied English in the UK. Cumulatively, they generated 705,451 student weeks. Student numbers from Europe have increased in recent years, mostly

thanks to the growing junior segment. At the same time, for English UK members the number of weeks generated by these European countries dropped by 2% between 2018 and 2019. As a result of the pandemic, student numbers from these markets fell by 89% between 2019 and 2020. Student weeks declined by 80%. (SEE FIGURE 1).

FIGURE 1: Selected European source markets for English UK member centres

	Student weeks 2018	Student weeks 2019	Student weeks 2020	Student numbers 2018	Student numbers 2019	Student numbers 2020
Italy	258,064	260,043	28,859	127,972	135,089	11,504
Spain	122,850	114,358	21,771	46,750	48,461	6,169
France	89,525	88,174	27,143	35,812	33,630	4,825
Switzerland	70,501	62,721	16,213	17,006	15,879	2,649
Germany	60,301	55,707	10,100	31,374	30,479	3,448
Poland	32,489	26,021	10,984	6,635	6,646	918
Romania	7,676	18,869	1,962	1,628	2,175	207
Austria	11,610	12,052	974	8,176	8,927	493
Czech Republic	10,728	10,096	1,243	4,877	4,575	256
Portugal	9,445	10,073	2,478	3,003	2,804	334
Belgium	10,316	9,941	3,851	3,786	3,582	792
Netherlands	8,330	7,930	2,720	3,577	3,493	576
Bulgaria	6,725	6,810	4,115	1,087	1,018	247
Sweden	6,380	6,440	2,215	1,568	1,488	204
Hungary	4,634	4,175	1,064	1,403	1,301	127
Greece	3,335	3,806	688	1,229	1,489	82
Slovakia	2,693	2,700	514	894	900	78
Latvia	1,933	2,112	1,207	411	468	64
Denmark	2,907	1,931	298	1,299	847	44
Lithuania	1,531	1,492	541	323	369	48

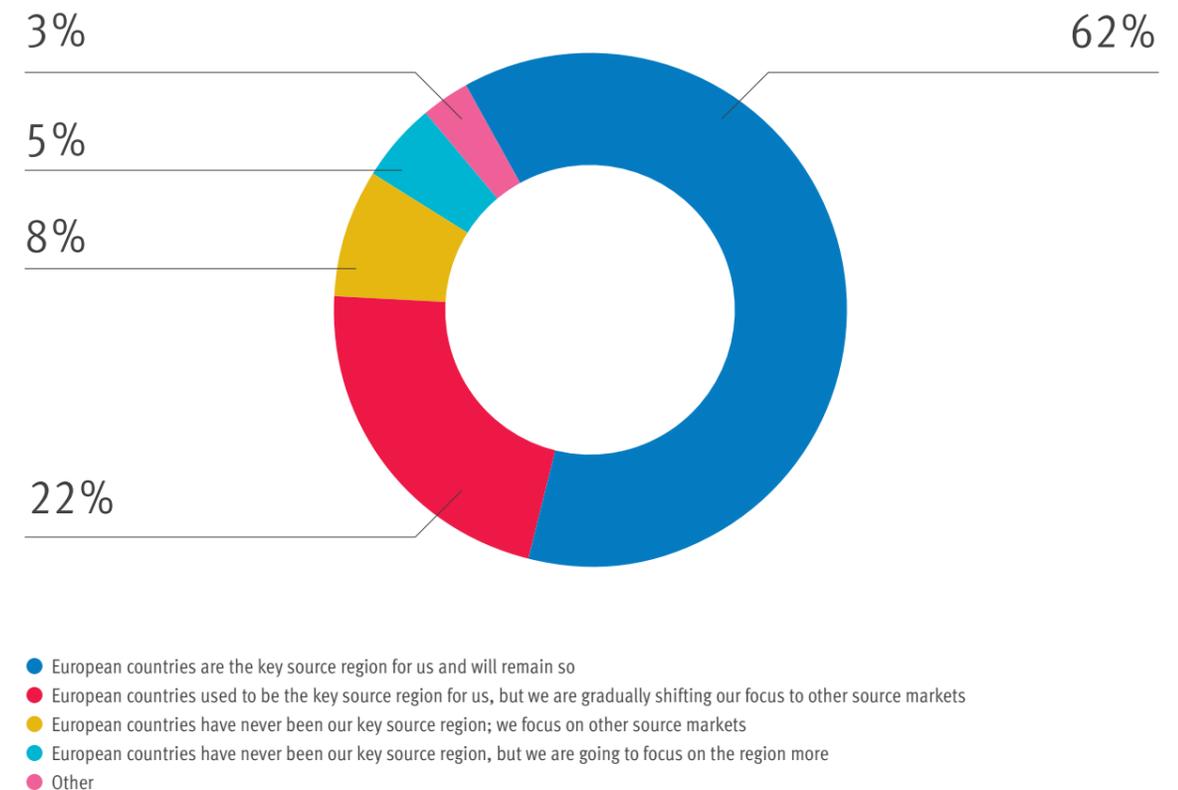
SOURCE: English UK, 2018-2019 (2018 n=412 members, 2019 n=408 and 2020 n=327)

These European markets are particularly important to the private ELT sector in the UK. The volume to the private providers is heavily concentrated around five source markets. According to English UK data for 2019, Italy (132,667 students), Spain (47,385), France (33,152), Germany (29,941) and Switzerland (15,762) delivered 86% of all European students taught at private member centres.

As regards the state sector, European countries represent 23% of all English language students enrolled. In 2019, the top source markets in Europe for state sector English UK members were Italy (2,422 students), Spain (1,076), Romania (787), Poland (545) and Germany (538).

The findings from the quantitative survey of 145 UK ELT providers undertaken for this report suggest Europe will continue to constitute a key stream of English language students to the UK. In fact, 62% of centres perceived Europe to be the key source region and believe it will remain so (SEE FIGURE 2). This trend is predominantly driven by seasonal centres that cater to juniors only, 74% of which target young learners who come from European countries. For 22% of UK ELT providers, European countries used to be the priority region; however, they have shifted their focus to other markets.

FIGURE 2: Importance of European countries as a source region for UK ELT providers



SOURCE: BONARD survey of accredited UK ELT centres; n=145

ONCE TRAVEL FULLY RESUMES, 44 % OF EDUCATION AGENCIES PREDICT THAT THE UK WILL REMAIN THE FIRST CHOICE FOR THEIR CUSTOMERS.

Perception of the UK as an English Language Study Destination

Following the outbreak of the Covid-19 pandemic, the UK was one of the most affected European countries. However, since early 2021, the country's image as a safe study destination has improved due to its handling of the pandemic, and especially thanks to the positive vaccination rollout across the country. This development was praised by education agencies from all European source markets.

As a result, the overall perception of the UK among prospective students from Europe, according to agencies, is fairly positive (scoring 39 points on a sentiment scale between -100 and 100 as minimum and maximum value, respectively). Nevertheless, this varies significantly across individual European source markets (SEE FIGURE 3). Responding agencies from Portugal, Switzerland and Poland exhibited a very positive perception of the UK as a study destination for English language learners. Furthermore, since Brexit-related implications do not affect prospective students from Switzerland, they are keen to resume their travel to and studies in the UK.

Traditional source markets such as France and Germany also perceive the UK positively (scoring 43 and 44 points, respectively). Brexit played a more important role than the pandemic in shaping the German attitude. However, the long-term partnership between Germany and the UK as well as certain benefits (proximity, possibility to travel) will be key factors in decision-making processes.

The UK scored below average among Italian and Spanish agencies (32 and 25 points, respectively). As both countries chiefly send junior students to the UK, this perception was influenced by the concerns of parents in regard to uncertainty around international travel.

Education agencies expect a further boost to the UK's positive image thanks to a clear roadmap for international travel and the vaccination rollout. It is anticipated that the customer's confidence will be fully restored in the next two years. Almost half of the agency survey respondents (45 %) indicated that, thanks to the ongoing vaccination rollout, parents and students will be more inclined to choose the UK as an English language study destination (SEE FIGURE 4).

At the same time, 39% of education agencies see other factors (such as Brexit and the political and economic development of source markets) as having a much stronger impact on future demand. In the short term, perceptions have been affected by the UK's pre-summer travel roadmap. Uncertainty remains over when individual European countries will move from amber to green status (until they do, quarantine is required when traveling to the UK); hence, many European students are opting for Malta for their summer English language courses.

From a long-term perspective, the changes in the visa system will affect students opting for longer studies, bringing additional costs through visa requirements as well as other costs (health insurance, tuition, etc.). This concern correlates with 29% of responding agencies anticipating that the UK will lose its place as a primary study destination for their customers (SEE FIGURE 5).

Once travel fully resumes, 44 % of education agencies predict that the UK will remain the first choice for their customers, and an additional 10 % see the UK regaining its place as the number one choice. Therefore, more than half of prospective students will still choose the UK as their primary study destination for English language courses.

FIGURE 3: European agencies' perception of the UK as an English language study destination

Country	Score
Portugal	81
Switzerland	75
Poland	66
United Kingdom*	60
Romania	50
Germany	44
France	43
Italy	32
Spain	25
Bulgaria	22
Belgium	-50
Czech Republic	n/a
Hungary	n/a
Slovakia	n/a
Sweden	n/a

*on-shore agency

Perception score level



SOURCE: BONARD survey of European education agencies; n=100, the higher the score, the more positive perception in a particular market

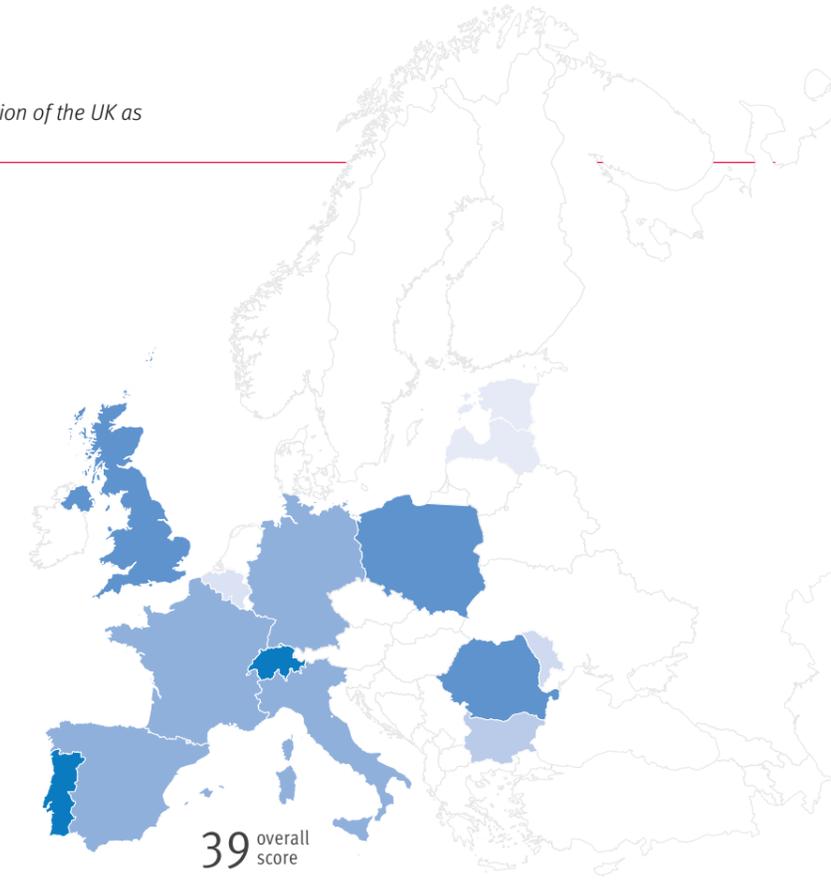
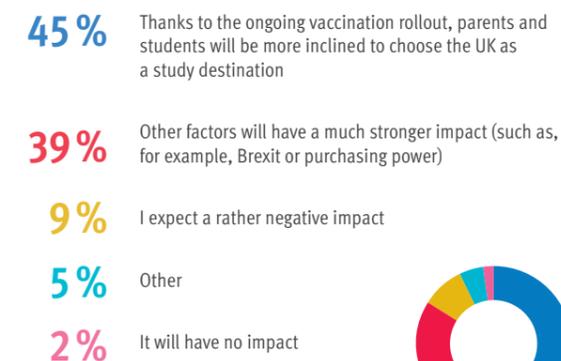
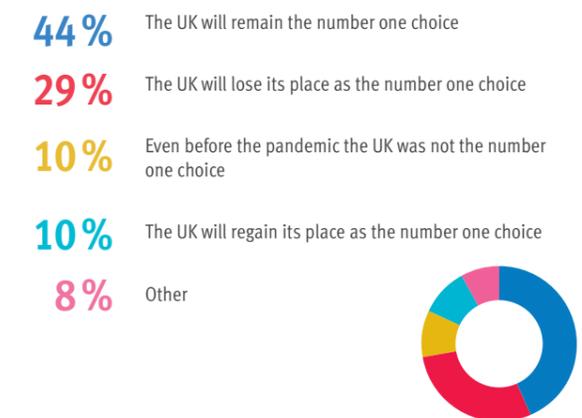


FIGURE 4: UK government's handling of the pandemic influencing the decision to study English there or not



SOURCE: BONARD survey of European education agencies; n=100

FIGURE 5: Prospective customers' attitude toward English language study in the UK once travel resumes



NOTE: Numbers do not add up to 100% due to rounding. SOURCE: BONARD survey of European education agencies; n=100

ONCE TRAVEL RESUMES, 43 % OF EDUCATION AGENCIES ANTICIPATE DEMAND WILL REACH BETWEEN 11 %–30 % OF PRE-COVID-19 LEVELS.

Current Demand

With the outbreak of the pandemic, UK ELT faced an unprecedented decline in bookings in 2020. While many had hoped for a better outlook for 2021, the research surveys show both UK ELT providers and education agencies remain cautious in planning for this year. Due to the different pace of vaccination roll-out and the rate of spread of Covid-19 across countries, there is much uncertainty around when travel restrictions will lift.

2021 began with a lockdown, and heavy travel restrictions were in place through most of Q1 2021. Consequently, English language providers saw 63 % fewer bookings than they would have if the Covid-19-related travel restrictions had been lifted and travel resumed (SEE FIGURE 6).

In Q2 2021, the lifting of restrictions on face-to-face classes delivered new bookings. UK ELT providers were able to achieve 52 % of their anticipated student volume.

Opening premises with extensive health and safety measures in place imposed additional expenses on providers. Despite the emergence of new challenges such as online learning during quarantine, considerations about students' mental

health, and increased flexibility to accommodate student needs, the opening-up of school premises brought hope that the sector is exhibiting the first signs of recovery.

The surveyed educators and agencies were asked to consider two scenarios and predict the impact these could have on enrollment figures (SEE FIGURES 6 AND 7). UK ELT providers and agencies were both uncertain about the summer period but noted that if prospective students from Europe could travel to the UK without mandatory quarantine, bookings could reach around 20 % of pre-Covid-19 levels.

However, at the time of writing the traffic light system brought in by the UK government has designated most of Europe as amber, with visitors requiring quarantine. In this situation, English language providers anticipated losing 91 % of bookings, with 48 % of education agencies anticipating only 1 %–10 % of bookings.

In both scenarios, the predicted demand is bleak. As Q3 2021 is the strongest quarter for juniors, many UK ELT centres and education agencies are facing a second summer without any substantial business income.

FIGURE 6: UK ELT centre perspectives on English language students predicted to be enrolled in each quarter in 2021 - Considering two scenarios



SOURCE: BONARD survey of accredited UK ELT centres; n=145

Thanks to the vaccination rollout, however, an improved outlook for Q4 2021 was anticipated. If travel resumes, 43 % of education agencies anticipated demand levels would reach between 11 % and 30 % compared to the pre-Covid-19 period.

Overall, if the travel restrictions remain in place through most of 2021, UK ELT providers anticipated 82 % fewer bookings compared to the scenario of such restrictions being lifted.

FIGURE 7: European agency perspectives on anticipated demand in each quarter in 2021 compared to pre-Covid-19 levels - Considering two scenarios

	Q1 2021	Q2 2021	Q3 2021	Q4 2021
SCENARIO 1: Covid-19 related travel restrictions remain in place for most of 2021				
1 %–10 %	84 %	66 %	48 %	52 %
11 %–20 %	4 %	18 %	27 %	18 %
21 %–30 %	2 %	5 %	8 %	11 %
31 %–40 %	1 %	1 %	7 %	7 %
41 %–50 %	0 %	3 %	2 %	2 %
51 %–60 %	0 %	0 %	4 %	2 %
61 %–70 %	0 %	0 %	0 %	1 %
71 %–80 %	1 %	1 %	1 %	2 %
81 %–90 %	1 %	0 %	0 %	0 %
91 %–100 %	6 %	6 %	2 %	4 %
More than 100 %	0 %	0 %	0 %	0 %

	Q1 2021	Q2 2021	Q3 2021	Q4 2021
SCENARIO 2: Covid-19 related travel restrictions are lifted and travel resumes				
1 %–10 %	0 %	0 %	0 %	0 %
11 %–20 %	43 %	33 %	26 %	23 %
21 %–30 %	17 %	20 %	25 %	20 %
31 %–40 %	10 %	4 %	17 %	13 %
41 %–50 %	5 %	12 %	6 %	8 %
51 %–60 %	12 %	16 %	13 %	11 %
61 %–70 %	2 %	4 %	4 %	13 %
71 %–80 %	5 %	6 %	3 %	8 %
81 %–90 %	2 %	2 %	3 %	3 %
91 %–100 %	5 %	4 %	4 %	1 %
More than 100 %	0 %	0 %	0 %	0 %

SOURCE: BONARD survey of European education agencies; n=100

NOTE: Numbers do not add up to 100% due to rounding.

EDUCATION PROVIDERS AND AGENCIES EXPECT THAT **THE MARKET WILL RECOVER TO 80%–100% OF PRE-COVID-19 BOOKINGS BY 2023.**

Future Demand

Despite some anticipated impact from the pandemic and Brexit, the ELT market in the UK will continue to benefit from the longstanding tradition of being the primary destination to study the English language at high-quality educational institutions.

Overall, the UK was the most popular destination in 2019, with a global market share of 42% in terms of student numbers (taking into account eight major English language study destinations: Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK and the USA).

Using historical quantitative data reported by English UK member centres for the association's annual student statistics reports, a mathematical calculation was applied to forecast student numbers and weeks for 2021–2023 (SEE FIGURE 8). The method takes into account the dip in student numbers and student weeks in 2020, and projects the future market situation in the context of broader historical developments in the past ten years.

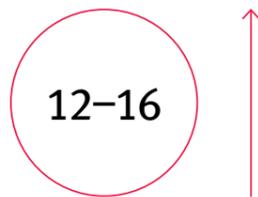
Travel will eventually resume and the calculation is in line with the expectations of English language providers and agencies that the market will recover to 80%–100% of pre-Covid-19 bookings by 2023. It is

anticipated that the average length of stay will continue to decrease, causing a decline in overall student weeks in 2023.

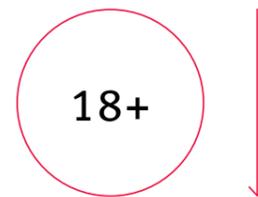
According to the interviewed UK ELT providers, the stream of students coming from Europe has limited growth potential. Juniors represent a segment that will offer a stable flow of students from Europe, especially for the 12–16 age band. In contrast, the number of adults will continue to decline and innovation in recruitment will be required to keep up the stream of students.

From a long-term perspective, it will be difficult to maintain the same volume of students from European countries and, in the coming decade, other source markets for UK ELT will gradually take over.

For European countries, key factors behind this development are a combination of achieving certain English language proficiency (hence market maturity) and demographic challenges. On the other hand, for Asian and Latin American countries, it is driven by students' greater need to improve their command of English for either further education-related or career-associated purposes.

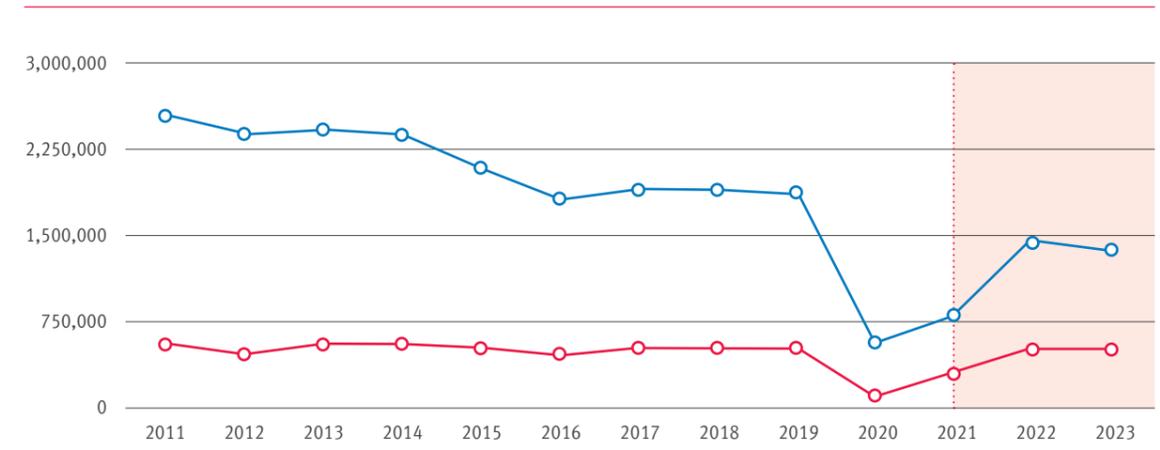


JUNIORS REPRESENT A SEGMENT THAT WILL OFFER A STABLE FLOW OF STUDENTS FROM EUROPE, ESPECIALLY FOR THE 12–16 AGE BAND.



IN CONTRAST, THE NUMBER OF ADULTS WILL CONTINUE TO DECLINE AND INNOVATION IN RECRUITMENT WILL BE REQUIRED TO KEEP UP THE STREAM OF STUDENTS.

FIGURE 8: Foresight for 2021-2023



SOURCE: English UK, 2011 - 2020; BONARD, 2021

NOTE: Forecast represent a purely mathematical calculation using the Exponential Triple Smoothing method based on full historical quantitative data.

● Student numbers ● Student weeks
○ Forecast



THE CALCULATION IS IN LINE WITH THE EXPECTATIONS OF EDUCATION PROVIDERS AND AGENCIES THAT THE MARKET WILL RECOVER TO 80%–100% OF PRE-COVID-19 BOOKINGS BY 2023.

Adults

The majority of English language provider survey respondents did not foresee any increase in demand levels from any adult age bands. The most popular response, with every fifth respondent expecting it, was that demand in the 16–17, 25–34 and 35+ age groups would remain unchanged (SEE FIGURE 9).

The second largest cohort of survey respondents anticipated that demand would decline by 11%–20%.

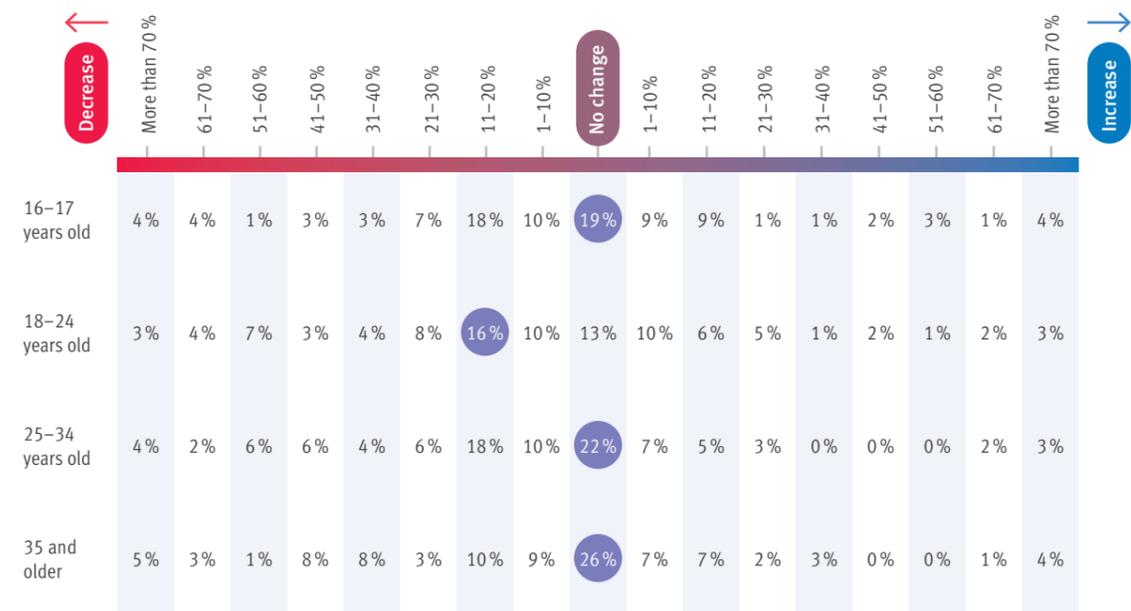
In the 20 in-depth educator interviews, the 35+ age band was consistently mentioned as having the greatest potential. In the post-pandemic world, the 35+ age group, and more specifically the 50+ group in key markets, are likely to have more disposable income, and the right product could attract them to the UK.

23% of survey respondents see potential in growth in the 18–24 age group and forecast that demand from this group will remain unchanged or slightly increase (1%–10%).

The predicted increase may be seen as a lingering effect of the pandemic: 16–17-year-olds who wanted to undertake an English language course in 2020 had to put their studies on hold. With the passing of time, this group will now seek to fulfil their education-related goals as adults.

Some of those who in pre-pandemic times would have been part of the 2020 cohort of 16–17 age band learners, however, could be considered inevitably lost business. They no longer have the time to travel and/or will have sought alternatives ways to study languages (opting for an online course or choosing a different language) in the meantime.

FIGURE 9: Adults: demand levels from European countries evolving over the next 3 years predicted by UK ELT providers for the following adult age groups once travel resumes



SOURCE: BONARD survey of accredited UK ELT centres; n=145

● Highest number of responses

Juniors

The vast majority of surveyed UK ELT providers do not see the junior segment expanding over the next three years. This is especially true for very young English learners (8–11 and 4–7 age groups, respectively).

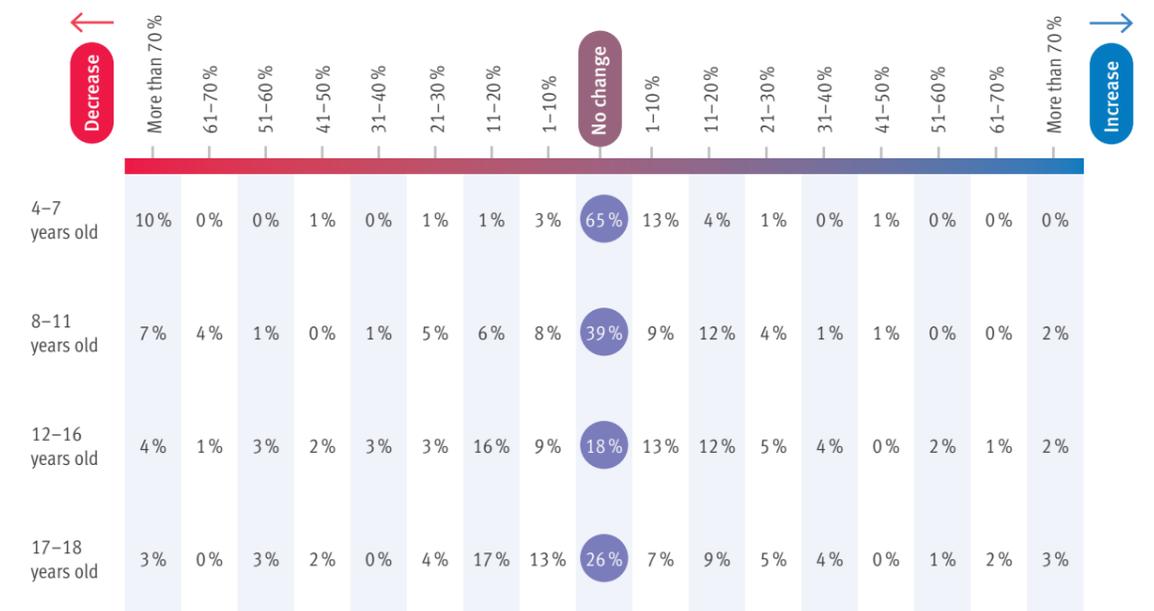
With many specific requirements, the 4–7 age band is not a target audience for most English language providers, and bookings for such young learners do not traditionally come from European countries.

Even before the outbreak of the pandemic, however, education providers saw a new trend toward juniors getting younger. While 39% of respondents anticipated the demand level for learners aged 8–11 would not evolve over the coming years, 21% see this group growing by up to 20% (SEE FIGURE 10).

The biggest opportunity for the junior segment was identified in the 12–16 age band, where both interviewed English language providers and education agencies reported they have seen an increase in bookings prior to the pandemic. The survey revealed that 26% of education providers believe that demand will evolve over the next three years by up to 20%.

There was a consensus that the inability to travel in 2020 generated a gap in demand from prospective customers in the 17–18 age group. In the short term, this could slightly increase the demand for adult courses. In the long term, with increased language proficiency at a younger age, interviewees felt prospective students in this 17–18 age bracket will seek out different types of English course to those currently offered to juniors.

FIGURE 10: Juniors: demand levels from European countries evolving over the next 3 years predicted by UK ELT providers for the following junior age groups once travel resumes



SOURCE: BONARD survey of accredited UK ELT centres; n=145

● Highest number of responses

76% OF EDUCATION AGENCIES ESTIMATE IN 2022 THAT **BOOKINGS WILL REACH BETWEEN 40% AND 80% OF PRE-COVID-19 LEVELS.**

Market Recovery Scenarios

As will be shown later in the report, education agencies will play a very important or important role in the market recovery process according to 93% of surveyed providers. Therefore, identifying and understanding possible developments in the agency market landscape in Europe and how it might look in the post-pandemic world was of particular interest. In this context, agencies from selected countries were also asked about their long-term business focus strategies (SEE FIGURE 11).

The travel restrictions in place during most of 2020 forced education agencies (41%) to expand their portfolios and branch out into new sectors (such as higher education). Moreover, one in five education agencies has decided to no longer focus on ELT, choosing to explore and establish in new sectors instead.

Despite the pandemic, 9% of respondents are considering branching out into the ELT sector, and 22% consider ELT will remain their main business.

Furthermore, in order to shed more light on the market sentiment education agencies from across Europe were also asked to share their viewpoints on possible recovery scenarios to aggregate individual knowledge into an informed overall assessment of the future outlook (SEE FIGURE 12). For 2021, survey respondents were not very optimistic, as 54% anticipate 20% of bookings compared to 2019.

Commenting on 2022, 76% of responding education agencies estimated that the market will reach between 40% and 80% of pre-Covid-19 levels. Only 6% of respondents anticipated reaching 100% of the bookings made in 2019.

By 2023, recovery is perceived more positively: 33% of European education agencies responding anticipated full recovery (i.e., 100% of pre-Covid-19 bookings). Furthermore, 22% of survey respondents predicted that they would regain 80% of bookings, and 26% anticipated regaining 60% of their normal annual bookings.

FIGURE 11: Long-term strategy of European education agencies



- We will remain focused on ELT, and we are looking to branch out into new sectors (e.g., Higher Education, High Schools, etc.)
- ELT will remain the biggest business for our agency
- We no longer focus on ELT, new sectors (e.g. Higher Education, High Schools, etc) are our biggest business and will remain so
- Other
- Other sectors (e.g. Higher Education, High Schools) were our main focus but we are looking to branch out into ELT

SOURCE: BONARD survey of European education agencies; n=100

FIGURE 12: European agency perspectives on market recovery scenarios segment's interest in studying in the UK



SOURCE: BONARD survey of European education agencies; n=100

INTRODUCING THE RIGHT TO WORK MIGHT REVERSE THE DOWNWARD TREND IN ADULTS. IF WORK RIGHTS WERE INTRODUCED, EDUCATION AGENCIES (45 %) ANTICIPATE THE DEMAND LEVEL WOULD INCREASE BY UP TO 30 %.

Adult Segment

Over the last few years, adult student numbers coming from European countries have been on the decline. Both the surveyed UK ELT providers (54 %) and education agencies (48 %) believe that the number of adult students from European countries will continue to decline.

It is noteworthy that 39% of education providers believe that this segment presents an opportunity for growth. Sustaining Europe as a source market for adults will require rethinking and reinventing the traditional approach to recruiting adults, in the view of 81 % of survey respondents (SEE FIGURE 13). Alternatively, the vast majority of education providers (80 %) perceive the option of exploring new European markets as the way forward.

Compared to other ELT destinations, the UK does not offer the right to work for ELT students. Reintroducing the right to work might reverse the downward trend in adults. If work rights were introduced, education agencies (45 %) anticipate the demand level would

increase by up to 30 % (SEE FIGURE 15). At the same time, 38 % of providers do not think that the removal of work rights caused a decrease in English language students from Europe (SEE FIGURE 14).

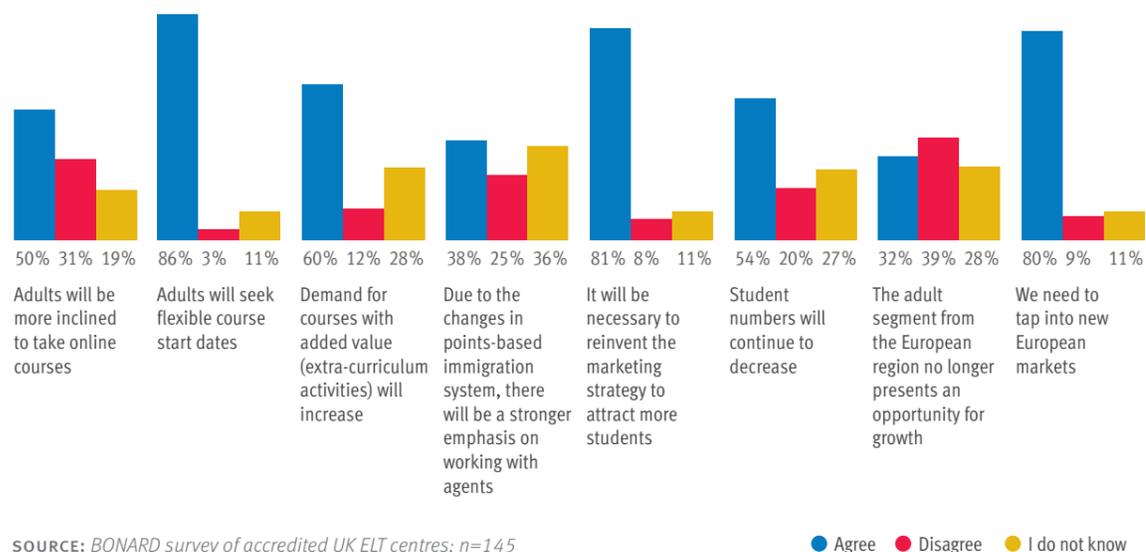
With the overall cost of studying English in the UK relatively high, the country is usually favoured by students who have a higher disposable income and are therefore not necessarily looking for the possibility to work to offset study-abroad-related costs. Rather the main interest is from those wanting to gain work experience in the UK.

KEY CONSIDERATIONS

Target audience

From a short-term perspective, once travel resumes the 17–18 age band could represent an opportunity to tap into. These are prospective students who have been deprived of travel for more than a year and whose parents are keener on allowing them to travel than parents of younger juniors.

FIGURE 13: UK ELT provider perspectives on trends in the adult segment from European countries once travel resumes



SOURCE: BONARD survey of accredited UK ELT centres; n=145

The second potential target group is 50+ adults from European countries. With more disposable income at hand, more free time and having been vaccinated sooner than the younger groups, this group could be a source of bookings spread throughout the year.

Product on demand

The UK is well-known for its wide array of course offerings. This was voiced by education agencies as a competitive advantage to other ELT destinations.

The Covid-19 pandemic brought new trends in demand, starting with the online course offering which has become an integral part of the portfolio. The very foundation of English language teaching will remain face-to-face interaction; however, 50 % of education agencies anticipated that adults will be more inclined to take an online course as either pre-sessional or follow-up classes after the course (SEE FIGURE 18).

The second change brought by the pandemic is flexibility. While education providers and agencies have already been adapting to this trend, the level of flexibility required has increased tremendously.

Looking at future product offers, flexible course start dates will be essential, especially until the travel industry recovers. The second layer of flexibility relates to delivery mode and online course offers: 48 % of ELT providers anticipate that prospective adult students will seek flexible delivery modes (SEE FIGURE 13).

Moreover, adult students are looking more into specialised courses. This was confirmed by 51 % of educators. Agencies claim that prospective students among adults are looking for English for Specific Purposes and Business English & Professional English more than they were before the pandemic. This is especially interesting for the 17–18 and 18–24 age groups, who seek tangible outcomes from their English course (SEE FIGURE 19).

Lastly, attracting the 50+ segment requires adjustment to the existing course portfolio. The research revealed that this age group is looking for General English courses with extra-curriculum activities. Offering adult groups a few English language classes in the morning and extra-curriculum activities in the afternoon is still the preferred product for adults from European countries.

FIGURE 14: Providers: impact of the removal of work rights for European English language students had on demand levels

No change	38%
1–10% fewer students to the UK	11%
11–20% fewer students to the UK	16%
21–30% fewer students to the UK	8%
31–40% fewer students to the UK	7%
41–50% fewer students to the UK	4%
More than 50% decrease in students	16%

SOURCE: BONARD survey of accredited UK ELT centres; n=145

FIGURE 15: Agencies: estimated impact on demand levels if work rights for English language students were introduced in the UK

We would send 1%–10% more students to the UK	18%
We would send 11%–20% more students to the UK	14%
We would send 21%–30% more students to the UK	14%
We would send 31%–40% more students to the UK	7%
We would send 41%–50% more students to the UK	7%
We would send 51%–60% more students to the UK	6%
We would send 61%–70% more students to the UK	3%
We would send 71%–80% more students to the UK	3%
We would send 81%–90% more students to the UK	1%
We would send 91%–100% more students to the UK	10%
No impact (e.g. we only work with juniors)	18%

SOURCE: BONARD survey of European education agencies; n=100

THE BIGGEST OPPORTUNITY FOR THE JUNIOR SEGMENT WAS IDENTIFIED IN AGE BAND 12–16. BOTH EDUCATION PROVIDERS AND EDUCATION AGENCIES HAVE SEEN AN INCREASE IN BOOKINGS PRIOR TO THE PANDEMIC.

Junior Segment

Statistics from English UK members showed the proportion of juniors studying English in the UK especially from European countries had steadily increased over the six years prior to the pandemic. The outbreak of Covid-19 devastated the junior market in the UK, with the proportion of juniors dropping from 57% in 2019 to 13% in 2020. As juniors travel predominantly in groups and parents had concerns about health and safety, junior numbers plunged.

At the time the survey of English language providers was carried out (in Q1 2021), 43% of survey respondents were still waiting to make the final decision regarding planning strategy for the summer. Providers anticipated that the summer could start later in the third quarter and bring about 15%–20% of their usual business. Furthermore, 34% of respondents had already planned to reduce the number of beds to balance incoming business and existing costs (SEE FIGURE 16).

At the beginning of May, the UK government published guidelines that initially put the majority of European countries on the 'red list', thus completely preventing any travel from them, except for returning British and Irish citizens and official UK residents. Those who travelled would have to self-isolate in a government-mandated hotel for ten days.

In the course of May, most European countries moved to the 'amber list', from where prospective students still have to quarantine for ten days on arrival in the UK. However, there is no requirement to do this in a government-sanctioned hotel.

Consequently, summer bookings for juniors traveling to the UK have been cancelled or postponed to the second half of Q3. Postponements have been fueled by hope that, by then, the relevant European countries will have moved to the 'green list' as passengers from 'green list' countries do not need to self-isolate.

In parallel, education agencies have received few enquiries for junior courses in the UK. Commenting on domestic developments, agencies report many parents are still being very cautious with travel, especially for younger age bands. Those who want their child/children to travel over the summer have booked English language courses in other destinations, with Malta reportedly in high demand. Malta has more favourable entry conditions compared to the UK as no quarantine is mandated. This brings the second summer in a row with a drop in student numbers.

While the outlook for the last quarter of 2021 is better than for the summer, both education agencies

and providers are concerned that ID cards will no longer be accepted as a valid travel document (SEE FIGURES 17 AND 18). More than half of providers (64%) and education agencies (55%) anticipate that parents might look at other destinations because of the passport requirement. However, follow-up in-depth interviews revealed that the issue surrounding the ID cards is more to do with a lack of information than the prospect of not being able to use ID cards. Education agencies underlined that juniors have already been advised to use their passport for their travels, and any drop in demand from juniors due to Brexit will be rather short-term. Almost half of the surveyed education agencies (43%) believe that the junior numbers will continue to grow. Demand will be especially driven by government-sponsored schemes such as the Hungarian Tempus program.

KEY CONSIDERATIONS

Juniors will continue to get younger

The driving factor behind the development is the increasing level of English proficiency across the under-18 population. While 46% of providers and 38% of education agencies agree with this statement, a substantial drop in the age of juniors is not expected. The trend is the most visible in the 12–16 age band, where the proportion of 12–13-year-old learners has been rising. A very slow and gradual increase in numbers is expected for the 8–11 age band as well, making parent-child courses in demand. However, Europe does not represent a traditional source market for the 4–7 age band.

Residential vs Homestay

Among other trends, the pandemic accelerated the shift in accommodation preferences. As noted by education agencies (57%) and providers (58%), it is likely that residential accommodation will be the

most popular option. Agencies confirmed that this will vary depending on the age of prospective students. For the younger age band, some parents will opt for homestay to provide a cultural experience.

Product development

The core for course offerings in the junior segment will remain the same, with General English still in demand. However, in recent years prospective junior students have been more academically driven and sought added value in courses.

The following products, proposed by providers and confirmed by agencies, could attract juniors from Europe:

- General English courses targeting a younger age band with lower English proficiency
- English for Academic Purposes for juniors who are oriented toward academic achievement, incorporating, for example, classes at local higher education institutions
- English for Specific Purposes, incorporating classes with experts and practical activities into the curriculum (digital marketing, programming, becoming an influencer)

The traditional model of English language classes in the morning and extra-curricula activities in the afternoon is no longer in great demand. Students are keen to either enhance their academic background or explore new areas that will give them a comparative advantage in the future job market. In parallel, the agency survey confirms that there will be interest in more specialised courses (78% of respondents) and courses with added-value extra-curricula activities (84% of respondents). In terms of online delivery, in contrast to the adult segment, 51% of education providers do not see junior students being more inclined to take part in online classes before travelling to the UK.

FIGURE 16: Accredited UK ELT centres' planning strategies for Q3 2021 compared to Q3 2019

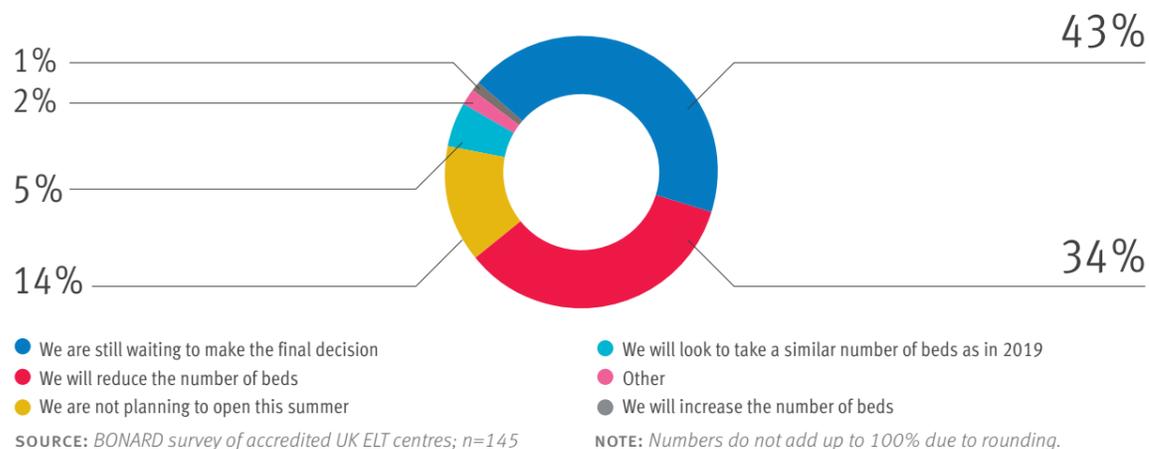
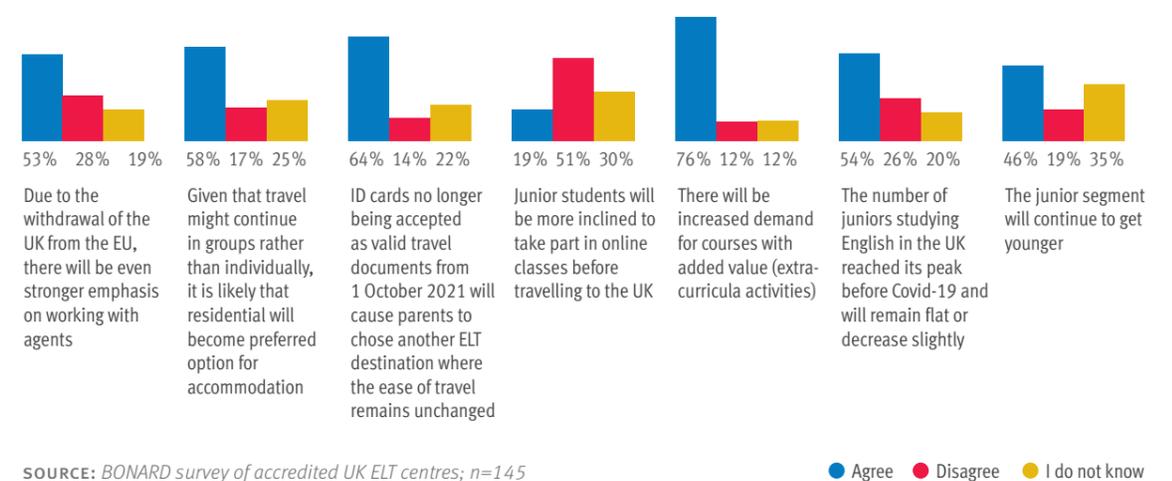


FIGURE 17: UK ELT provider perspectives on trends in the junior segment from European countries once travel resumes



Agency Perspectives

FIGURE 18: Agency perspectives on future trends

	Agree	Disagree	I do not know
English language students will be more inclined to take part in online classes before travelling to the UK	36 %	49 %	15 %
It is likely that residential accommodation will be the most popular option	57 %	24 %	19 %
ID cards no longer being accepted as valid travel documents from 1 October 2021 will cause parents to choose another ELT destination where ease of travel remains unchanged	55 %	26 %	19 %
Interest to learn English in the UK will increase	25 %	53 %	22 %
Juniors will prefer to travel in groups rather than individually	44 %	37 %	19 %
Junior student numbers will continue to rise	43 %	28 %	29 %
Number of adults studying English in the UK will continue to decline	48 %	26 %	26 %
The junior segment will continue to get younger	38 %	36 %	26 %
There will be an interest in more specialised courses than General English	78 %	12 %	10 %
There will be increased demand for courses with added value (extra-curricula activities)	84 %	3 %	13 %

SOURCE: BONARD survey of European education agencies; n=100

FIGURE 19: Agency perspectives on the future outlook for English language courses

	Growth	No change	Decrease	I do not know
General English	38 %	33 %	26 %	3 %
Business English & Professional English	29 %	43 %	23 %	6 %
English Plus	33 %	39 %	18 %	11 %
English for Academic Purposes	37 %	34 %	21 %	8 %
English for Specific Purposes	26 %	42 %	19 %	13 %
One-to-one	19 %	50 %	19 %	13 %
Teacher Development	19 %	37 %	20 %	24 %

SOURCE: BONARD survey of European education agencies; n=100

Promotional Focus

This section brings together findings from interviews and responses gathered via the quantitative surveys to outline the features that set the UK apart from other ELT destinations and form the evergreen core of promotional activities.

Education agencies consider the main factors driving prospective students from Europe to choose the UK as their study destination as: learning the language in 'the home' of English language (89%), experiencing British culture as part of their studies (84%), and the quality of education in the UK (76%).

The research therefore suggests that the above-mentioned factors should remain at the heart of the promotional focus of the UK. However, strengthening the focus on the English language experience in the UK, quality of the courses and wide array of offerings, in particular, could speak to a wider audience.

Furthermore, closer collaboration in the promotion of the ELT sector with portals such as VisitBritain and their social media accounts could revive a stream of English language learners.

While it would be beneficial to provide a targeted market-specific campaign, this is a costly solution which, in the current situation, would not be feasible for any party. Untapped opportunity, however, lies within particular ELT sector segments.

Over the years, the UK has established itself as a destination for juniors, despite not having a targeted campaign promoting itself as an ELT study destination for young learners. Therefore, the promotional focus should include targeting juniors and parents in Europe.

In light of the above, the survey also revealed that only 40% of education agencies think that prospective students see the UK as a safe environment to study in, and 24% see the UK as a tolerant and welcoming country. This represents an area to focus on in both collective and individual marketing and should be part of the bigger campaign targeting juniors.

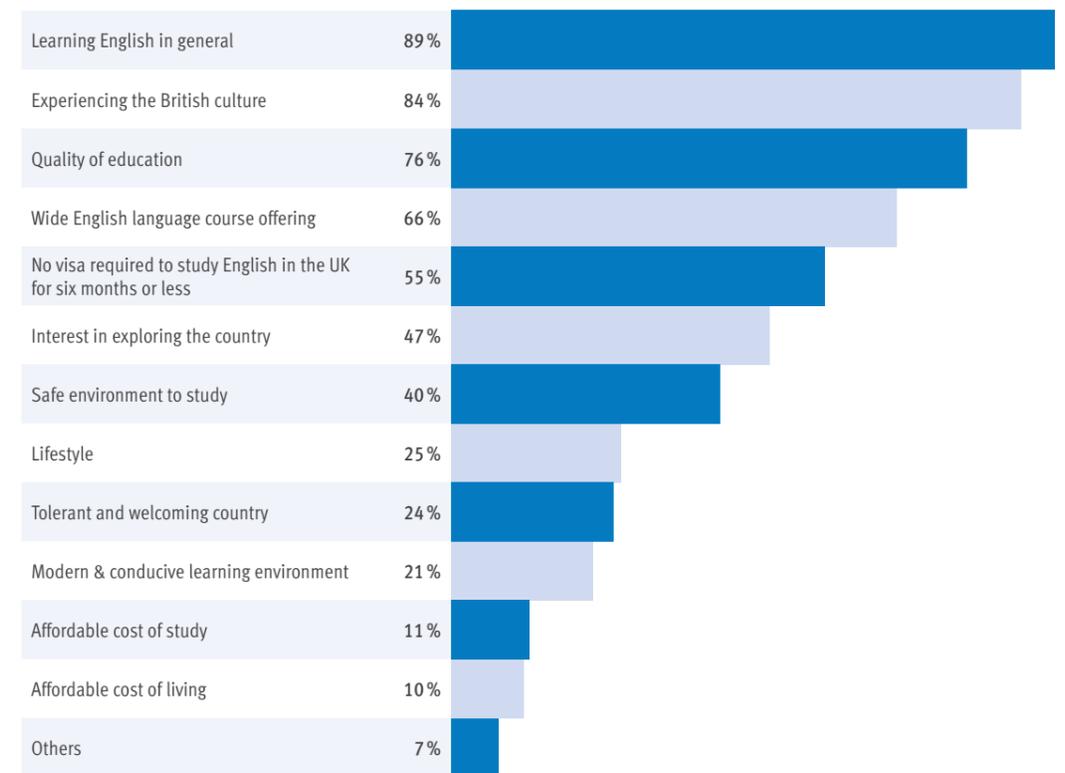


STRENGTHENING THE **FOCUS ON THE ENGLISH LANGUAGE EXPERIENCE IN THE UK, QUALITY OF THE COURSES AND WIDE ARRAY OF OFFERINGS** COULD HELP TO BROADEN THE AUDIENCE.



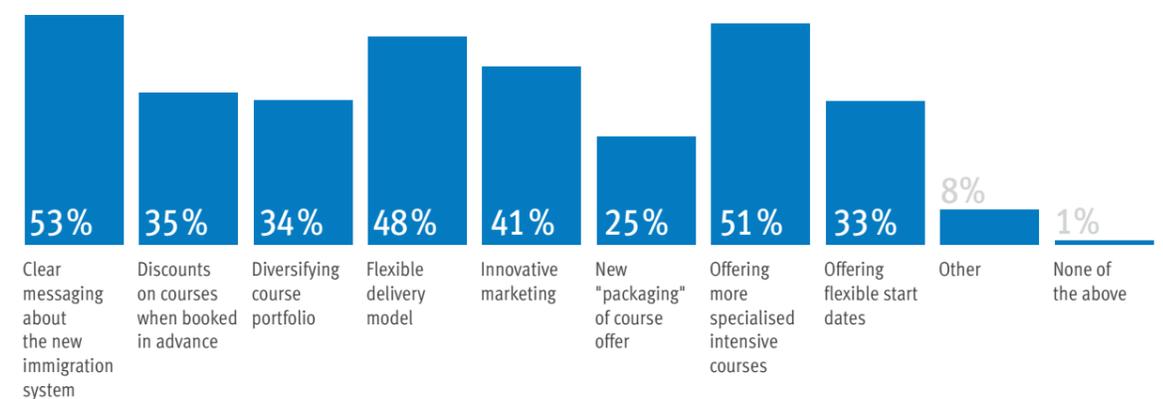
OVER THE YEARS, THE UK ESTABLISHED ITSELF AS **AN ENGLISH LANGUAGE STUDY DESTINATION FOR JUNIORS**, DESPITE NOT HAVING A TARGETED CAMPAIGN AIMED AT YOUNG LEARNERS.

FIGURE 20: Agency perspectives on factors which drive customers to choose the UK as an English language study destination



SOURCE: BONARD survey of European education agencies; n=100

FIGURE 21: UK ELT provider perspectives on factors with the biggest impact on increasing demand levels and/or increase margin



SOURCE: BONARD survey of accredited UK ELT centres; n=145

NOTE: Multiple options possible

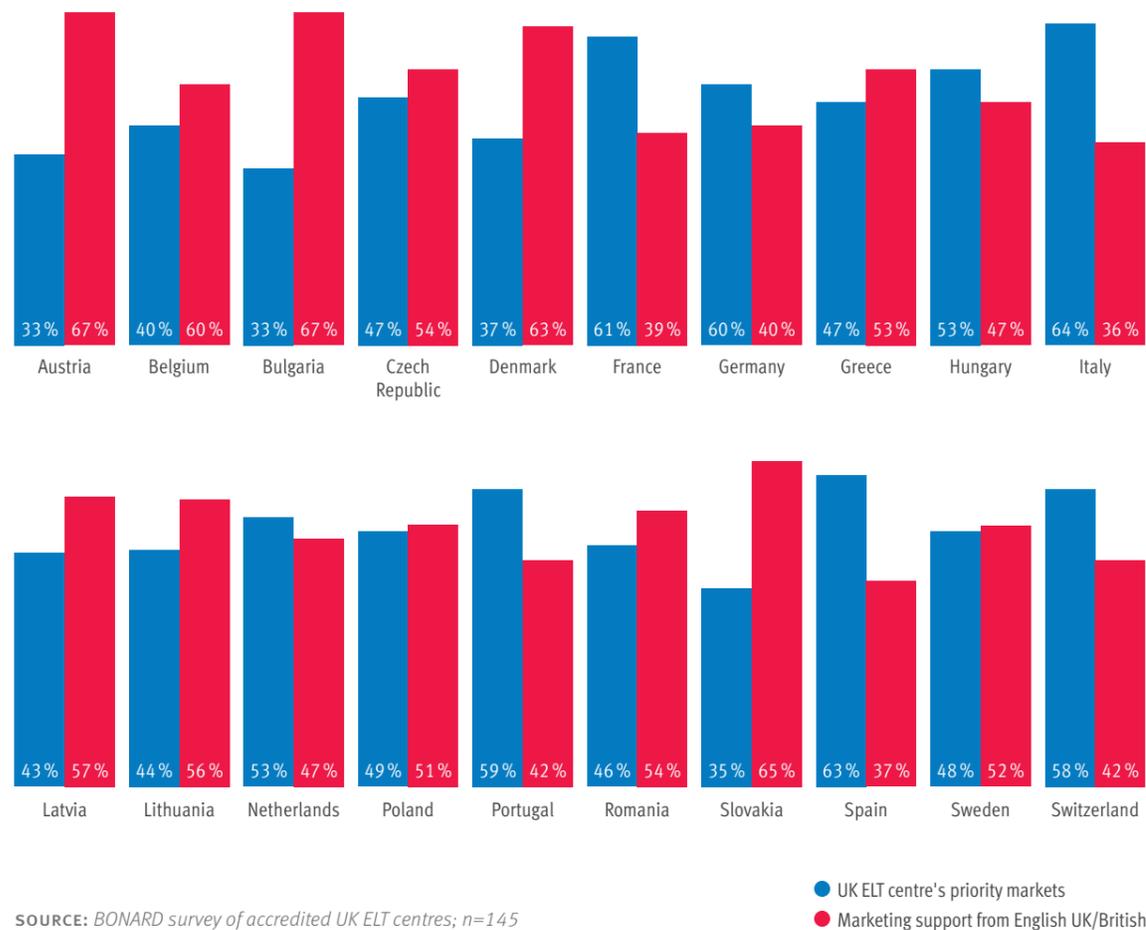
PARTICIPATING CENTRES RECOGNISED ITALY, SPAIN AND FRANCE AS THE TOP THREE PRIORITY MARKETS FOR THEIR OWN MARKETING ACTIVITIES.

Priority Markets

Corresponding with their overall size and importance to UK ELT, participating centres recognised Italy (64 % of respondents), Spain (63 %) and France (61 %) as the top three priority markets for their own marketing activities.

As for source countries where language centres wished to benefit from marketing initiatives carried out by English UK and the British Council, Austria (67 %), Bulgaria (67 %) and Slovakia (65 %) topped the ranking.

FIGURE 22: UK ELT provider perspectives on priority markets in marketing activities



SOURCE: BONARD survey of accredited UK ELT centres; n=145

In-country Provision

Taking into account recent developments, the research quantified opportunities related to establishing in-country courses as a potential new source of revenue for UK ELT providers.

especially juniors, who are not willing or able to travel due to restrictions. From a long-term perspective, in-country provision was deemed to have limited potential only.

Both education agencies and providers gave rather mixed feedback. Almost half (48 %) of the surveyed UK ELT providers would consider offering in-country provision. Those considering this type of expansion saw the highest potential in Italy (83 %), Spain (70 %) and France (47 %). Education agencies confirmed the potential for UK ELT providers to supply in-country provision for juniors, especially in the three markets mentioned above, as well as in Greece and Portugal.

FIGURE 24: UK ELT provider perspectives on European countries where demand for in-country provision exists

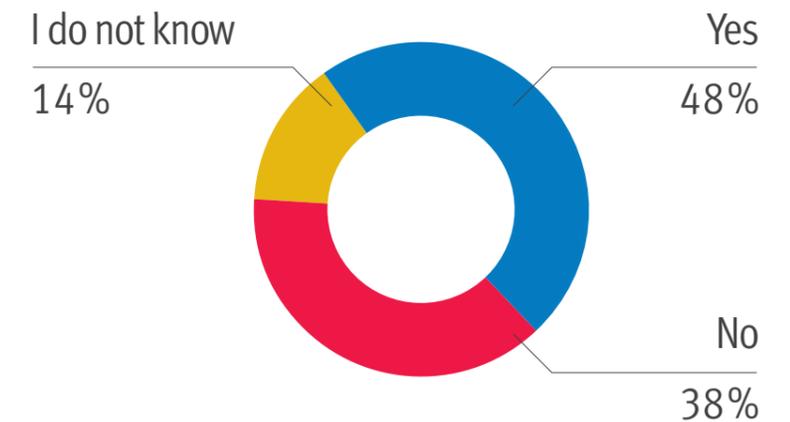
France	47%
Germany	15%
Italy	83%
Spain	70%
Switzerland	19%
Other	17%

SOURCE: BONARD survey of accredited UK ELT centres; n=145

At the same time, both education providers and agencies underlined that this activity would represent a rather short-term opportunity, for example for the next two to three years. This is a product that would help maintain, at least in part, the stream of students,

FIGURE 23: Percentage of UK ELT providers who would consider to offer in-country provision (e.g., a summer camp in Spain)

Would you consider to offer in-country provision (e.g. a summer camp in Spain)?



SOURCE: BONARD survey of accredited UK ELT centres; n=145

Implications of Brexit

The UK left the European Union (EU) on 31 January, 2020, with an 11-month transition period until the end of 2020. That transition period came to an end when the EU and the UK entered into a new relationship as of 1 January, 2021.

The impact of this development on prospective customers, from an education agency perspective, varies across individual source markets. In general, agencies noted that 31% of students may choose a different destination due to the changes and perceptions sparked by Brexit.

Education agencies also pointed out that this will particularly affect students looking at longer-term studies (more than 6 months). Furthermore, education agencies predict that the impact will gradually decrease and, from a long-term perspective, 1%–20% of students will choose a different destination to learn English because of Brexit.

This development was mainly ascribed to the ongoing pandemic and difficulty in differentiating the impact of travel restrictions from that of Brexit, both for education agencies and end customers.

UK ELT providers also anticipated a decrease by 35%, on average, in the number of students from European markets. The biggest concern was raised around Germany (a drop of 39% in demand compared to pre-Covid-19 levels), and considerable declines were also expected in Spain, Poland and Italy.

For the junior segment specifically, the main concern among UK ELT providers was how big of an impact Brexit will have in the last quarter of 2021, when the mandatory passport requirement will be implemented in full. By 2022, UK ELT providers concluded that the demand will decrease by one third compared to pre-Covid-19 levels.

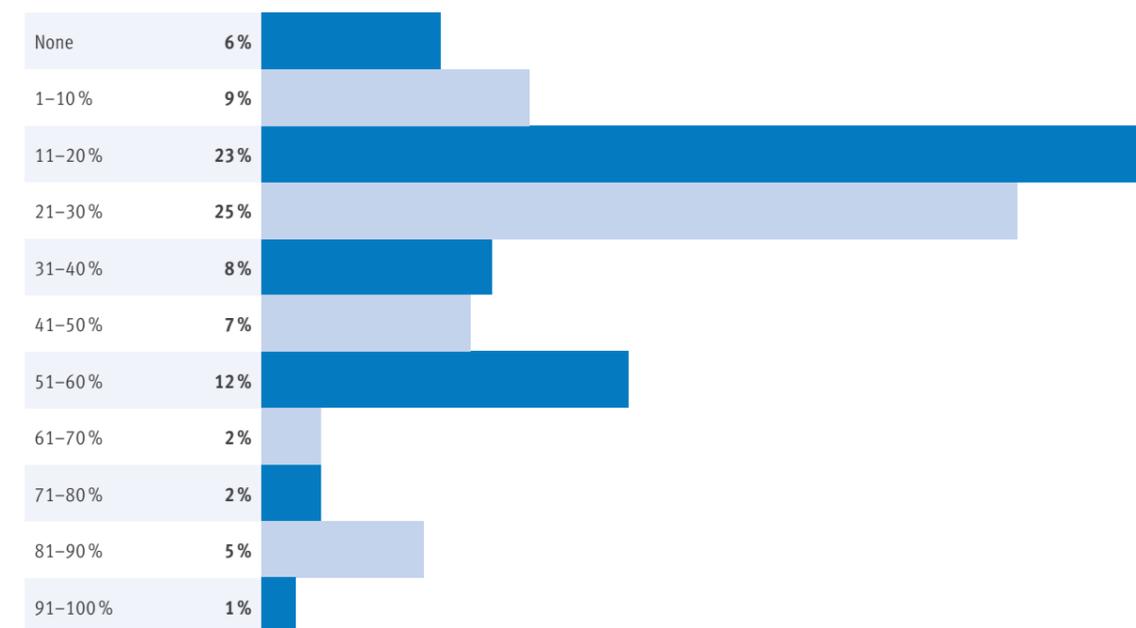
31%

IN GENERAL, AGENCIES NOTED THAT 31% OF STUDENTS MAY CHOOSE A DIFFERENT DESTINATION DUE TO THE CHANGES AND PERCEPTIONS SPARKED BY BREXIT.

35%

UK ELT PROVIDERS ANTICIPATE A DECREASE OF 35% IN THE NUMBER OF STUDENTS FROM THE SELECTED EUROPEAN COUNTRIES DUE TO BREXIT.

FIGURE 25: Agency perspectives on the percentage of students who will choose a different destination to the UK to learn English because of Brexit



SOURCE: BONARD survey of European education agencies; n=100

The pandemic marginalised industry discussion about Brexit (SEE FIGURE 26), with the majority of UK ELT providers (60%) noting that they had not yet received any feedback on changes in visa policies from their partner agencies. At the same time, almost one third (27%) of providers had received negative feedback from partner education agencies. It is noteworthy that the negative feedback relates more to a lack of understanding of the current situation than to issues with the visa system itself.

This lack of understanding was evident in the agency survey results (SEE FIGURE 27), as 44% of surveyed education agencies stated they did not have enough information about the new changes. Most of these agencies were from Romania (67%), Germany (50%), Spain (45%) and Italy (41%) (SEE FIGURE 28). At the same time, 40% of education agencies considered themselves well-informed, while 14% claimed they were mostly informed.

Additionally, qualitative interviews revealed a discrepancy in perceptions of the implications of Brexit for visas. While UK ELT providers see the changes to the visa system as a substantial threat to their business, education agencies do not perceive it as a key obstacle.

VISA

It was suggested that the fact that there are no new visa requirements for European citizens traveling to

study English language courses for up to six months should be actively pinpointed in marketing.

The concern raised by education agencies – that there is a lack of information and understanding among their customers of the visa-related implications of Brexit – can be counterbalanced by easy-to-understand marketing campaigns to share the message amongst prospective customers or parents (in the case of young learners).

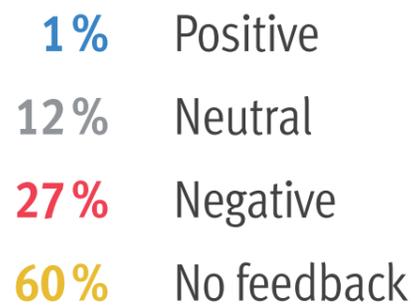
PASSPORTS

UK ELT providers recognised mandatory passports for travel as an issue that might cause a decline in demand from prospective students coming from European countries.

However, education agencies do not see this as a challenge. Either the adult segment in Europe already owns a passport or the cost and time required to obtain one are not a factor. This was confirmed across all major European source markets, including France, Italy, Spain, Germany and Switzerland.

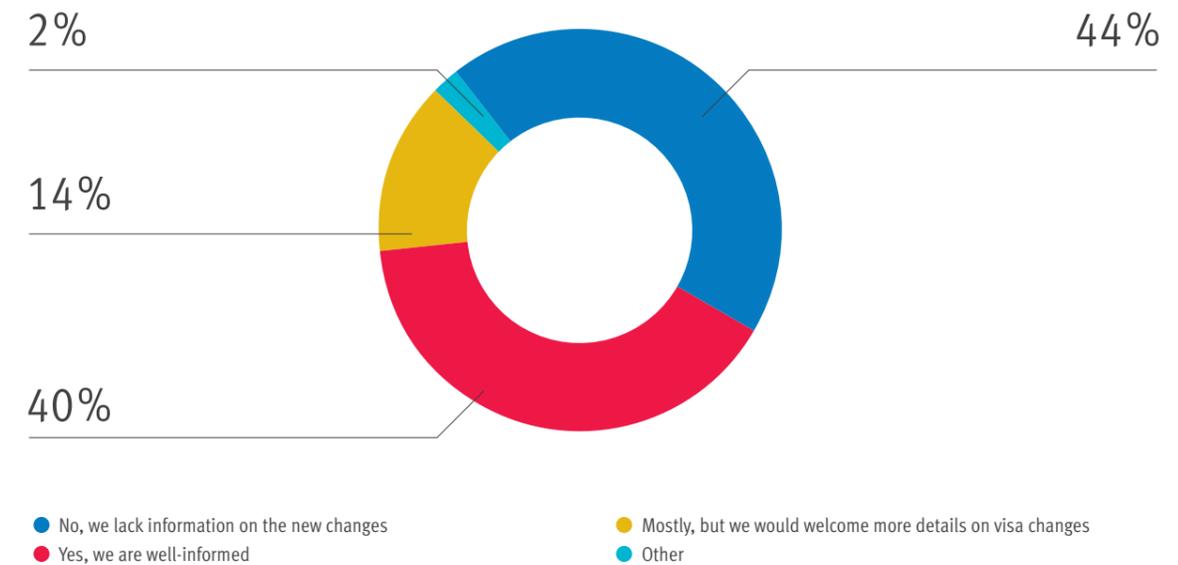
For juniors, education agencies confirmed that it is an established practice to have a passport before traveling to the UK. The only concern raised amongst agencies related to additional bureaucracy from divorced parents when obtaining a passport for their children.

FIGURE 26: Feedback received by UK ELT providers from agencies on changes related to visa policies



SOURCE: BONARD survey of accredited UK ELT centres; n=145

FIGURE 27: Education agencies' level of awareness about the new visa system in the UK



SOURCE: BONARD survey of European education agencies; n=100

FIGURE 28: Education agencies which lack information on the new changes to visa policy

Romania	67%
Germany	50%
Spain	45%
Italy	41%
Poland	33%
United Kingdom (on-shore agency)	31%
France	13%

SOURCE: BONARD survey of European education agencies; n=100, selected European countries
NOTE: European countries with low sample size (less than 2 responses) were excluded

There is a growing urgency to optimise and diversify the range of marketing channels. Education providers acknowledged the need to find new creative ways to disseminate information about – and updates on – changes to visas.

Marketing needs to be targeted; mass campaigns and one-way information-sharing will not yield the desired results, according to the providers. As regards the search for the best ways to communicate Brexit and its implications, UK ELT providers did not believe that a single universal method exists. On the contrary, the results of the provider survey show a variety of responses and preferences (SEE FIGURE 29).

The sector needs to have resources in place and work in close collaboration with agencies who can amplify the message. This is especially true when looking at the scarcity of resources in the post-pandemic world. UK ELT providers plan to focus on more strategic and quality partnerships with education agencies; in so doing, they will be able to dedicate more time and money towards building strong relationships.

Almost half of the survey respondents (49%) saw joint awareness activities with agencies and allocating dedicated support (personnel) to these queries as the most effective platforms for communicating visa-related information.

Education providers and agencies understand that to be truly effective in today's competitive environment, it is essential to be strongly visible in the online space.

Thus, 49% of UK ELT providers see social media as an effective tool to provide information related to Brexit.

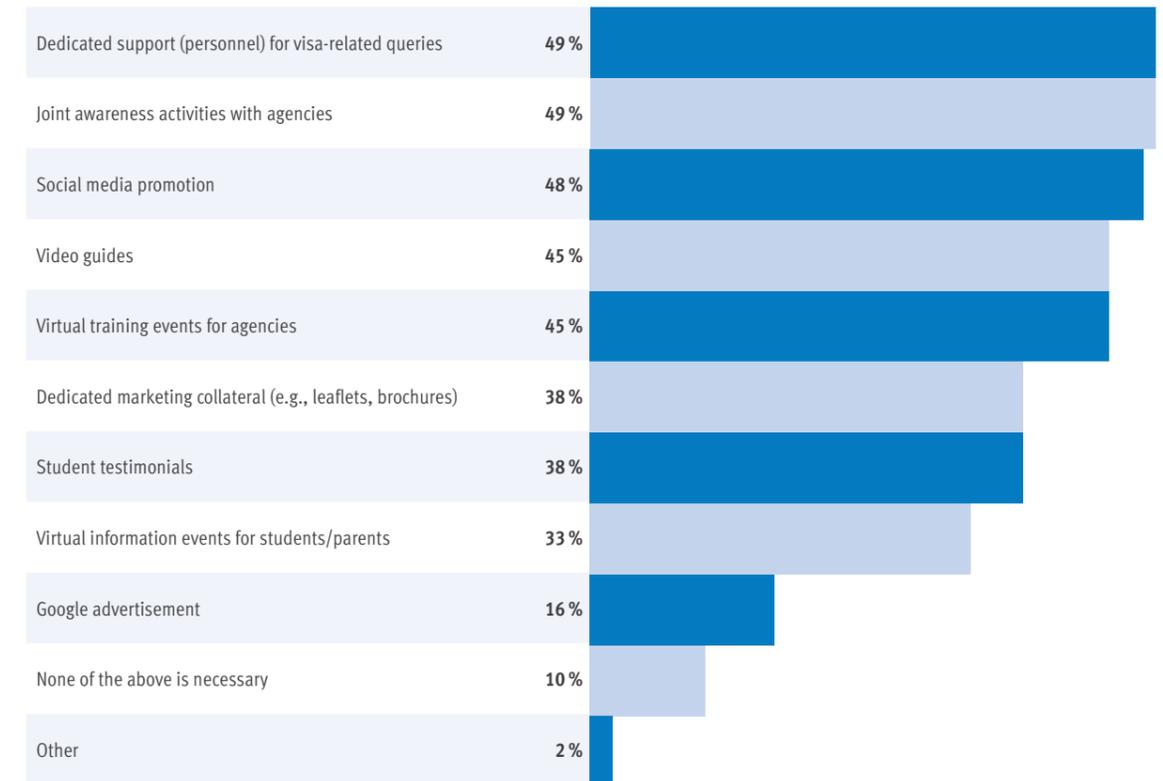
With scarce resources, 45% of UK ELT providers cited a preference for video guides. It was noted that such videos must be short and engaging for the viewer while also providing the much-needed clarity for uptake to be successful.

Furthermore, 45% of respondents recognise the value that virtual training events for agencies can provide. In combination with the above-mentioned marketing tools, 38% of respondents considered testimonials (advice from students applying under the new system, explaining or demonstrating the easiness of the process) to be important as they add credibility and authenticity to marketing.

Dedicated marketing collateral is seen as an effective tool by 38% of educators, and 33% of respondents recognise the value of virtual information events for students and parents.

At the same time, Google advertising does not seem to bring the needed traction, as only 19% of respondents see it as a way to bridge the information gap related to visa changes.

FIGURE 29: UK ELT provider perspectives on the effectiveness of marketing tools in increasing awareness of the points-based immigration system



SOURCE: BONARD survey of accredited UK ELT centres; n=145

COMPETITION FROM IRELAND IS PERCEIVED AS THE BIGGEST CHALLENGE BY THE UK ELT PROVIDERS.

Approaches to Student Recruitment in Europe

According to the interviewed UK ELT providers and agencies, even before the pandemic and Brexit, the sector saw that prospective students were increasingly wary of traditional marketing techniques and were far more focused on quality, value and the integrity of providers. The outbreak of the pandemic, as well as Brexit, merely accelerated the need to embrace the challenges in recruitment.

UK ELT providers noted that the factor that will most impact prospective students' interest in studying in the UK is competition from other traditional English-speaking destinations.

Competition from Ireland is perceived as the biggest challenge by both the UK ELT providers and education agencies.

Education agencies ranked other traditional destinations, such as Australia, Canada, New Zealand and the USA, the second biggest factor impacting the interest of prospective students in studying in the UK. One advantage enjoyed by the UK over the above-listed ELT destinations is its proximity to Europe.

As noted by both providers and education agencies, other ELT destinations will predominantly attract the adult segment (work rights) and junior segment looking into longer-term studies (high school programmes, pathways).

Both education providers and agencies see the competition from Malta as a short-term trend.

In light of the travel restrictions in place in the UK before summer 2021, English language students are opting for language courses in Malta. This is especially true for source markets such as Germany, the Czech Republic, Slovakia and Poland. The primary concerns expressed by education agencies in regard to Malta are the quality of accommodation and the available capacity.

Furthermore, the general perception of Malta as a holiday destination positions it as a short-term solution for students who are, conversely, increasingly academically driven (e.g., those who seek to improve their English in order to be able to enter a university abroad).

Work rights for English language students are a benefit sought by younger adults who are keen on acquiring a real-life workplace experience in the UK. By restoring adult ELT students' right to work up to 20 hours a week at accredited providers, the UK would be brought into line with the major English language competitor nations; however, this was not perceived as a particular financial necessity for students coming from Europe by the UK ELT providers.

While online delivery of English language courses will not replace the experience of face-to-face classes, it has become an advanced method of course delivery, attracting more students than ever before and now ranking as the fifth factor which will influence English language learners when choosing whether or not to travel to the UK to study.

FIGURE 30: European agency perspectives on factors that are likely to impact on market segment's interest in studying English in the UK



SOURCE: BONARD survey of European education agencies; n=100, selected European countries

NOTE: Score-based ranking – the higher the score, the bigger the factor.

IT WAS NOTED BY THE INTERVIEWED EDUCATION AGENCIES THAT, DUE TO THE PANDEMIC, THIS WILL BE **THEIR SECOND SUMMER WITHOUT A STREAM OF INCOME.**

Booking Channels

While UK ELT providers are fairly optimistic that the industry is starting on the path to recovery, it remains impossible to overstate the effect of Covid-19 on the industry. The pandemic is having a severe and sudden impact on the education agency landscape, and while the slow and steady uptake in numbers is trending in the right direction, there is still uncertainty around the speed and overall strength of the recovery.

Moreover, with almost every aspect of education moving into the online space, English language learners are more capable of using online platforms for booking. Furthermore, the limited availability to meet with agency representatives face-to-face, among other factors, is also being reflected in the most recent booking trends.

B2B

Education agencies dominate the booking channels used by UK ELT providers. It is difficult to replicate commercial relationships with agencies built over several decades. Furthermore, especially for juniors, education agencies will remain relevant, and it is very unlikely that the use of agencies will decline in the foreseeable future.

At the same time, the survey of education providers revealed that 66% of respondents will focus on quality of agents rather than quantity (SEE FIGURE 31). The focus will be on working with fewer partners in the mid- to long-term but moving into a more strategic space – that is, one which is more transparent, more accountable and features shared risks and rewards.

FIGURE 31: UK ELT provider perspectives on trends related to the use of various booking channels going into recovery

Educators will focus on quality of agents rather than quantity	66%
There will be a gradual transition towards more direct bookings	51%
There will be greater consolidation of the agent market	49%
Educators will focus on working with larger number of agents	28%
There will be a rise of business-to-government (B2G) channel	19%
Other	2%

SOURCE: BONARD survey of accredited UK ELT centres; n=145

It was noted by the interviewed education agencies that, due to the pandemic, this will be their second summer without a stream of income. Therefore, the number of education agencies active on the market will decline. The greater consolidation of the agent market was also noted by the UK ELT providers (49%), who emphasized the need to reinvent new strategic partnerships, reconstruct existing ones and provide mutual support in the coming years.

B2C

Since almost every aspect of life during the pandemic has moved online, UK ELT providers noted an increase in direct bookings. For the adult segment, many providers had seen a rising proportion of direct bookings even before the pandemic outbreak, but there was a surge in 2020. While direct booking channels require infrastructure for direct marketing, payment structures, booking services and translation to assist with student inquiries, providers are keen to explore this option. At the same time, they do not expect direct bookings to deliver more than 10%–15% of their business, on average.

B2G

For the European market, prospects for engaging through B2G recruitment opportunities were considered to be low. Only 19% of UK ELT providers thought there was potential to grow their student volume through the B2G channel, which largely reflects the short-term priorities of governments across Europe.

FIGURE 32: UK ELT provider perspectives on the importance of various booking channels on the road to recovery

	Very important	Important	Not so important	Not important at all	I do not know
Aggregator sites	5%	30%	33%	6%	26%
B2G (business-to-government)	9%	30%	31%	8%	23%
Companies (corporate sector)	13%	32%	37%	9%	10%
Direct	50%	44%	4%	1%	1%
Education agents	53%	40%	4%	1%	3%
Local schools (peer-to-peer partnerships)	17%	41%	26%	6%	10%
Teachers	24%	43%	22%	8%	4%
Tour operators	20%	42%	22%	8%	8%

SOURCE: BONARD survey of accredited UK ELT centres; n=145

● Highest number of responses

Going into recovery, education agents and direct bookings will remain the key booking channels for UK ELT providers (SEE FIGURE 32). More than 50% of respondents perceive the two booking channels as very important, and more than 40% of survey respondents see them as important.

Although providers noted an increase in direct bookings, the extent to which this increase manifests itself varies across the adult and junior segments. Parents sending their children to study English in the UK will be more reliant on support from education agencies. They will continue seeing education agencies as more reliable and comforting, as well as faster in responding to their queries, than a direct approach to a school.

On the other hand, UK ELT providers who cater predominantly to adults and the oldest age band in the junior segment have seen an increase in

direct bookings. Balancing the cost and available resources, this is the result of some UK ELT providers investing in expanding their direct booking channel portfolio.

Survey respondents also noted the importance of booking channels such as teachers and tour operators, with more than 60% of respondents seeing both channels as either very important or important.

At the same time, peer-to-peer partnerships were noted to be more important for education providers on the road to recovery. Closer collaboration between educational institutions is seen as a good prospect for an alternative booking channel.

The corporate sector, aggregator sites and B2G recruitment are not seen as such important recruitment channels (37%, 33% and 31%, respectively).

Recommendations

Traditionally, Europe has represented a stable source of students for English language providers in the UK. Proximity, quality of education and the wide array of courses on offer have all played a significant role in attracting students from the region. In recent years, UK's ELT sector has allured a growing number of juniors. On the contrary, due to an ageing population and the increased English proficiency of students from European countries, the number of English language learners aged 18+ has declined.

Europe as a source market for the UK ELT sector finds itself at a crossroads, as recent trends indicate shifts in demand and student preferences. The disruption to international student mobility flows caused by the Covid-19 pandemic, in combination with the implications of Brexit, has had a tremendous effect on demand from Europe.

Over the next five years, Europe will remain a key source market for UK ELT providers. The biggest potential will lie in the junior segment, which is poised for further growth once travel fully resumes and parents' confidence restores. As demand levels for traditional English language courses among adult students reach maturity, providers catering to the 18+ segment will need to seek ways to maintain volume, while seeking diversification in other source markets.

TARGET AUDIENCE AND PRODUCT DEVELOPMENT

Building on the momentum among junior students

UK ELT providers anticipated that, had the pandemic not hit, summer 2020 would have been the strongest ever in terms of junior student volume. The biggest opportunity for the junior segment was identified within in the 12–16 age band. Moreover, the proportion of 12–13-year-olds in this age group had been expanding, with UK ELT providers acknowledging that junior students are getting younger. In upcoming years, an increase in the number of students aged 8–11 is expected as well.

Managing a declining adult segment

Depending on a particular market, the flow of adults from European countries is envisaged to remain flat or continue to decline. It may prove difficult to justify the additional cost required to reinvent marketing or upgrade all course portfolios. However, a more segmented approach should be considered.

Targeting adult group travel

With an ageing population in Europe, the UK ELT sector can focus on the 50+ cohort, as it has higher levels of disposable income and more flexibility to travel than other target groups. For the 50+ age group, in particular, a product which combines General English courses with group traveling and/or activities (wine tasting, historical tours, etc.) has the potential to generate increased sales.

Making an appeal to young professionals through the provision of work rights for ELT students

To bring the UK on par with other major competitors in the global market and counter-balance the downward trend in adult English language learners from Europe, providers and agencies recommended the restoration of the right to work up to 20 hours a week for those enrolled at accredited providers. While the primary motivation of European students might not be financial compensation, there is demand among adult students for real-life work experience in the UK. According to 45 % of European education agencies, this change could stimulate interest in studying English in the UK within this target audience by up to 30 %.

Offering more specialised courses

One of the UK's competitive advantages over other ELT destinations is the wide variety of language courses on offer. Students are increasingly looking for value-added courses, and it is up to individual providers to identify and promote their unique selling points. It is noteworthy that improving English is no longer the primary or sole expectation of students who opt for a study-abroad experience. Therefore, it is recommended that providers promote courses that demonstrate tangible benefits and offer a progression

toward students' further education plans or access to work opportunities (digital marketing courses, leadership camps, soft skills workshops, etc.).

Delivering summer camps in source countries

A short-term opportunity for UK ELT providers has been identified as in-country delivery provision. Considering market conditions in 2020 and 2021, this product could help to maintain the stream of students, especially juniors for the next two to three years. The biggest potential for in-country provision was noted in the biggest markets volume-wise, namely Italy, Spain and France.

MARKETING

Leveraging the traditional promotional matrix

It is recommended that, for European countries, the traditional promotional matrix remains at the core of UK ELT sector's marketing. Content should be focused on the UK as 'the home of English language', where students will experience British culture as part of their studies, and receive high-quality education. This messaging has been stated as most effective for individual European countries.

Launching dedicated promotion for the English language sector

A sector-specific campaign that will highlight the English language experience in the UK is recommended in order to enlarge the pool of prospective customers. Moreover, as the UK welcomes large numbers of juniors learning English over the summer, a targeted campaign for parents promoting the proximity of the country as well as the quality and wide array of courses on offer will help revive a stream of English language learners.

Expanding social media coverage

Continuous use of social media is advised to reinforce the message about the benefits of experiencing life and language learning in the UK. Closer collaboration in the promotion of the UK ELT sector with organisations such as VisitBritain and use of their social media accounts could secure an additional stream of students once the market bounces back.

Reinforcing the image of the UK as a safe destination

The research revealed mixed industry feedback on whether the UK is viewed as a safe destination.

In the short-term, there is a clear need to address rising concerns in a more strategic way and on a larger scale to rebuild the confidence of parents. Factors to note in promotional materials include safety measures in place as the sector emerges from the Covid-19 pandemic as well as case studies and positive examples presented to students, parents and agencies through engaging content.

IMPLICATIONS OF BREXIT

Improving information provision

UK ELT providers, English UK and the British Council would benefit from delivering more awareness campaigns explaining the changes which Brexit has imposed on visas from European countries and providing the much-needed clarity to agents and potential customers in an interactive way. The emphasis should be placed on the fact that the immigration system has barely changed for short-term courses. It is advised that such campaigns combine a social media presence with training events and joint awareness activities with agencies, and are carried out by dedicated personnel (appointing a point of contact for the industry).

BOOKING CHANNELS

Nurturing strategic B2B partnerships

UK ELT providers see education agencies as their key distribution channel. Going into recovery, the agency landscape in Europe will not be unaltered; hence, there are opportunities to focus on building relationships with fewer, quality partners rather than targeting a large number of agencies. Adding transparency and accountability will foster lasting partnerships.

Increasing margin with B2C sales

As prospective adult students are now more comfortable functioning in the online space, UK ELT providers have experienced an increase in direct bookings. For those who already have online booking systems of their own, this represents an opportunity to facilitate 10%–15 % of business from Europe through B2C platforms.

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We are a membership organisation for accredited UK ELT centres, and we work with many groups and organisations around the world. We also work closely with special interest groups to support and promote excellence in English language teaching in the UK.

The British Council builds connections, understanding and trust between people in the UK and other countries through arts and culture, education and the English language.

We help young people to gain the skills, confidence and connections they are looking for to realise their potential and to participate in strong and inclusive communities. We support them to learn English, to get a high-quality education and to gain internationally recognised qualifications. Our work in arts and culture stimulates creative expression and exchange and nurtures creative enterprise.

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