

Reasons to be cheerful, part 3

**Michael Carrier
Highdale Consulting**

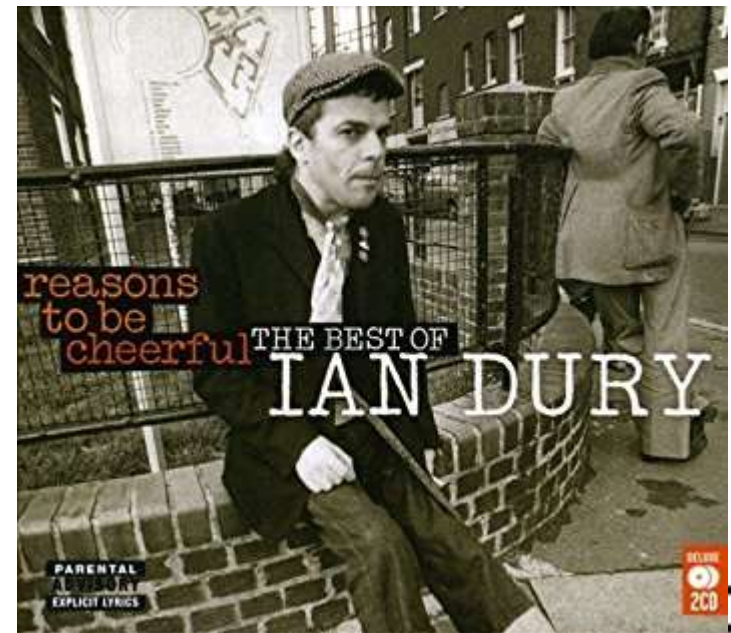
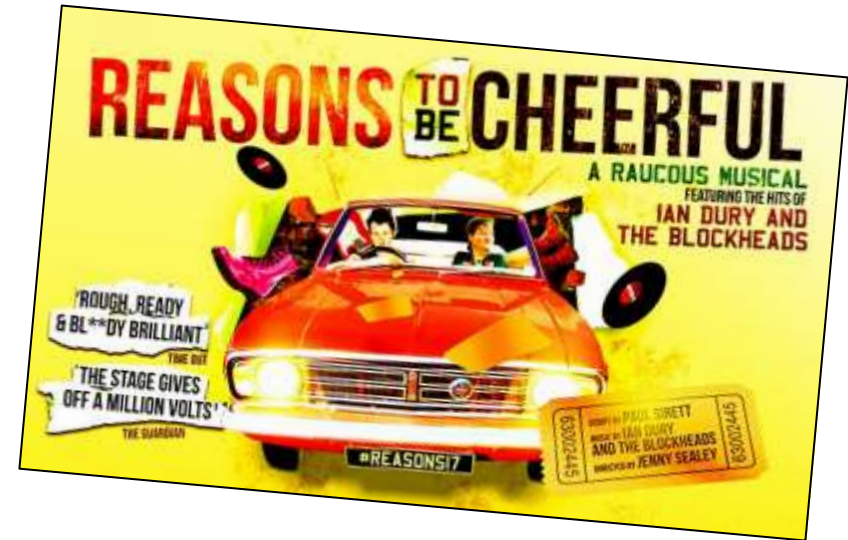
**EnglishUK Conference
January 2018**



Outline



- 1 – Doom
- 2 – Reasons to be cheerful
- 3 – Trends overseas
- 4 – Reasons to be worried
- 5 – Innovation:
 - Offer
 - New markets, new niches
 - Diversification
 - Technology



1 – ELT woes

- Schools closing
- Enrolments down
- Change in flows – shorter stays, last minute
- Adults down, Juniors up
- Visa regime
- Commodification
- Tighter profits
- Schools losing out to university language centres?
- Moving to pathways and university entrance?
- Brexit & Trump deterring students?

***Are we
doomed?***



2a - Demand still high

2 - Reasons to be cheerful

- 1500+ million learners of English globally
- ca. 0.5 million come to UK for English each year. UK student market is only 0.3% of world demand
- “More than 1m students from 175 countries study in the USA, with over 100,000 on short-term intensive ELT programmes” *EnglishUSA*
- Ca.15m teachers of English globally – ca. 250,000 language school teachers, or 1.6% of global profession

2b - economically important abroad

- Salary uplift
- GDP enhancement
- Global knowledge access
- Global research engagement

Salary Gap

The average salary gap of someone who can speak English vs. someone who does not is approximately 20%

Adequately Educated Workforce

- Over 50% of companies interviewed said that their workforce was required to speak English
- 30% of students in higher education aim to continue their studies abroad, especially in English-speaking countries, such as the UK, US and Australia



2c - UK government recognises ELT

ELT Working Group:

- Department of Industry & Trade (DIT) meetings
- Government support for export drive
- Aim to increase UK ELT export earnings from inbound students and export sales of products & services
- Aim to share opportunities for ELT export work – students, consulting, teacher training, publishing
- Regular opportunity briefing in partnership with EnglishUK
- ***Chair of ELTWG:*** michael@highdale.org

2d – Students are still coming

Chart 1

Student weeks by age group

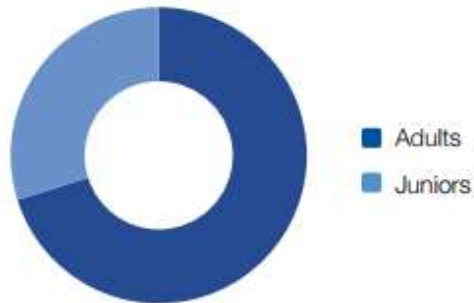
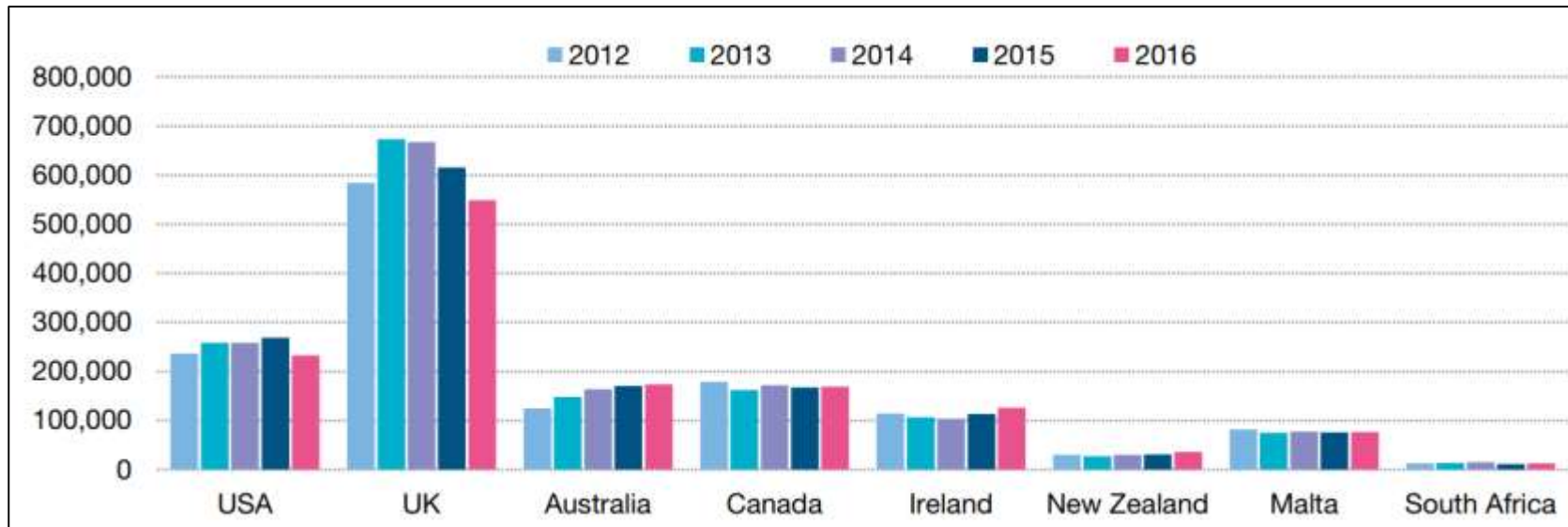
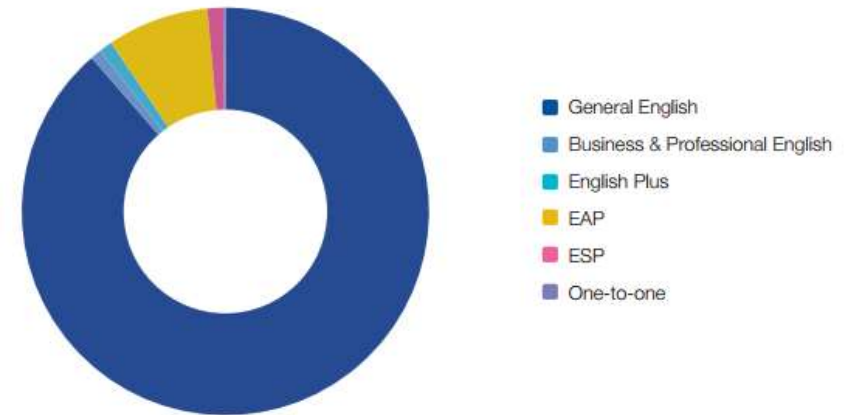


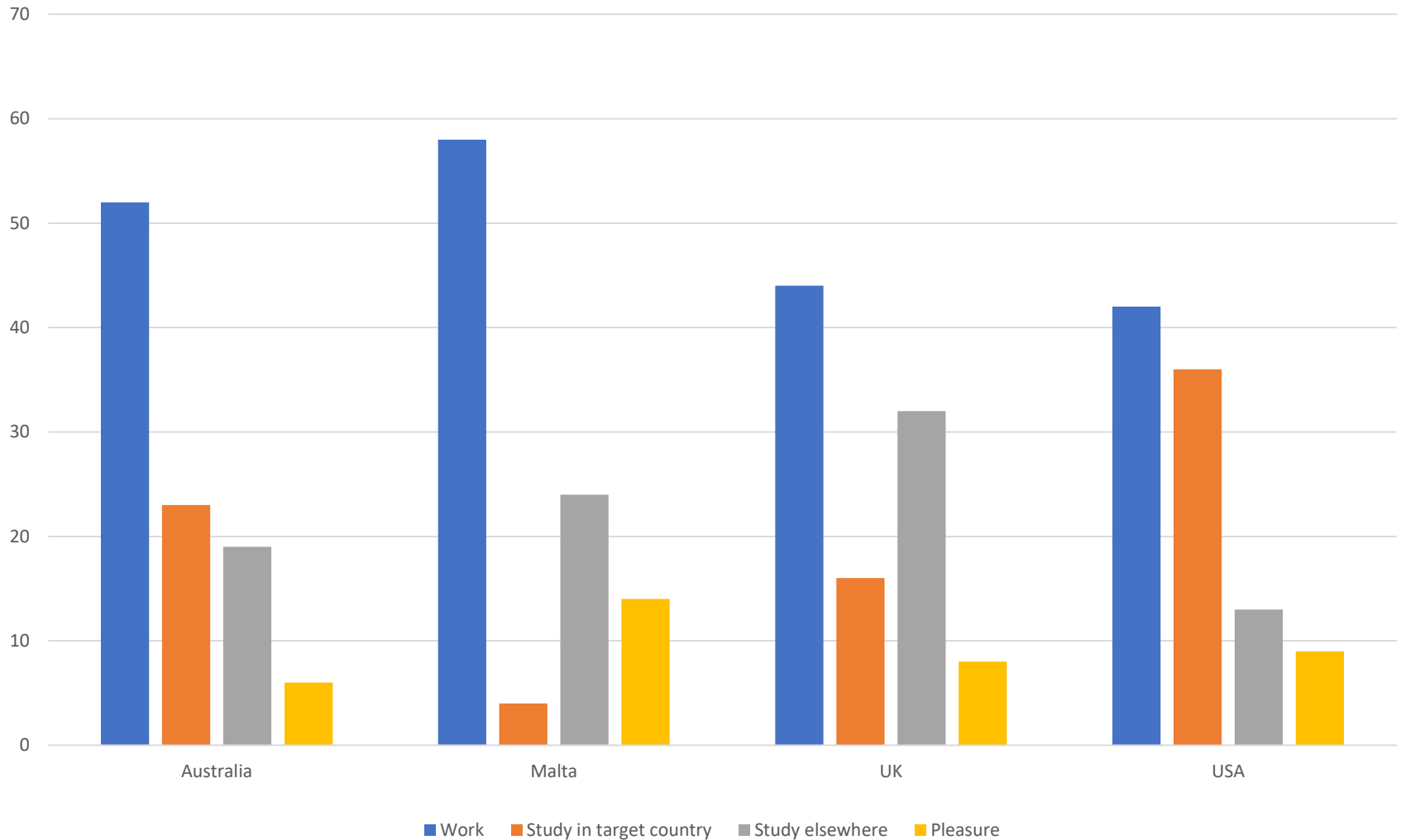
Chart 3

Student weeks by course type

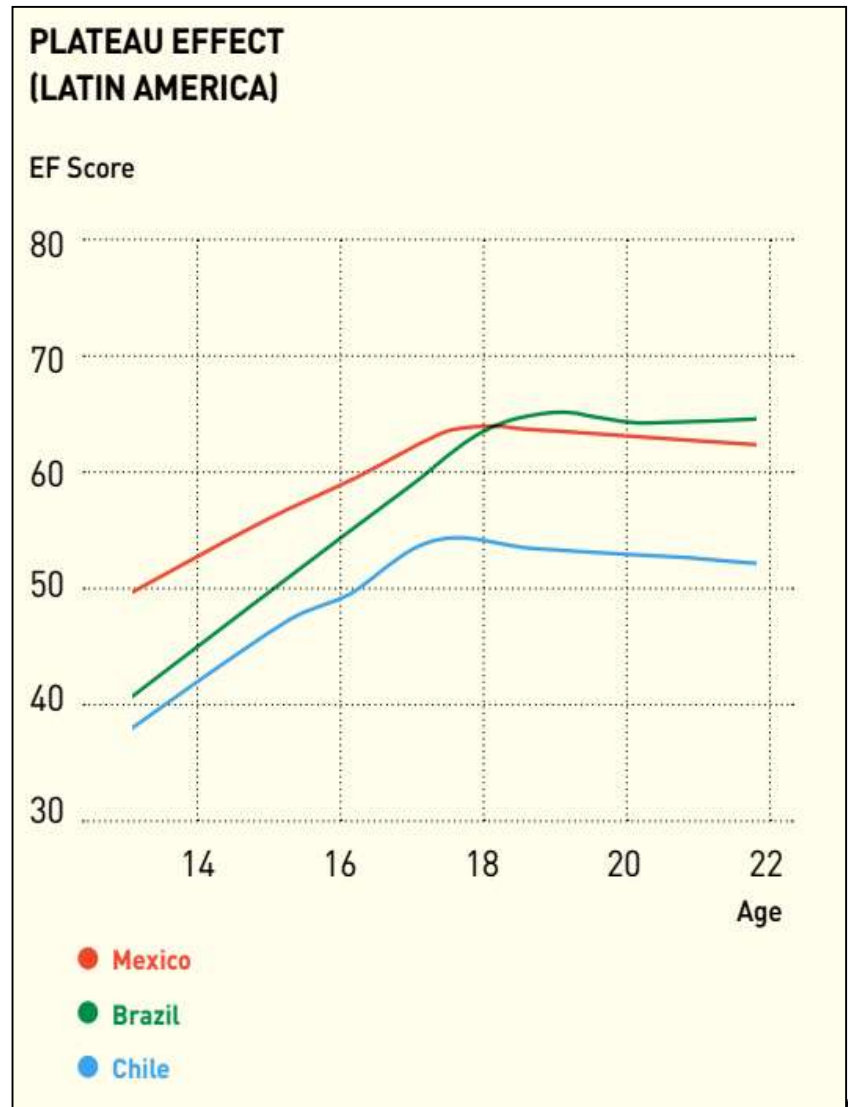
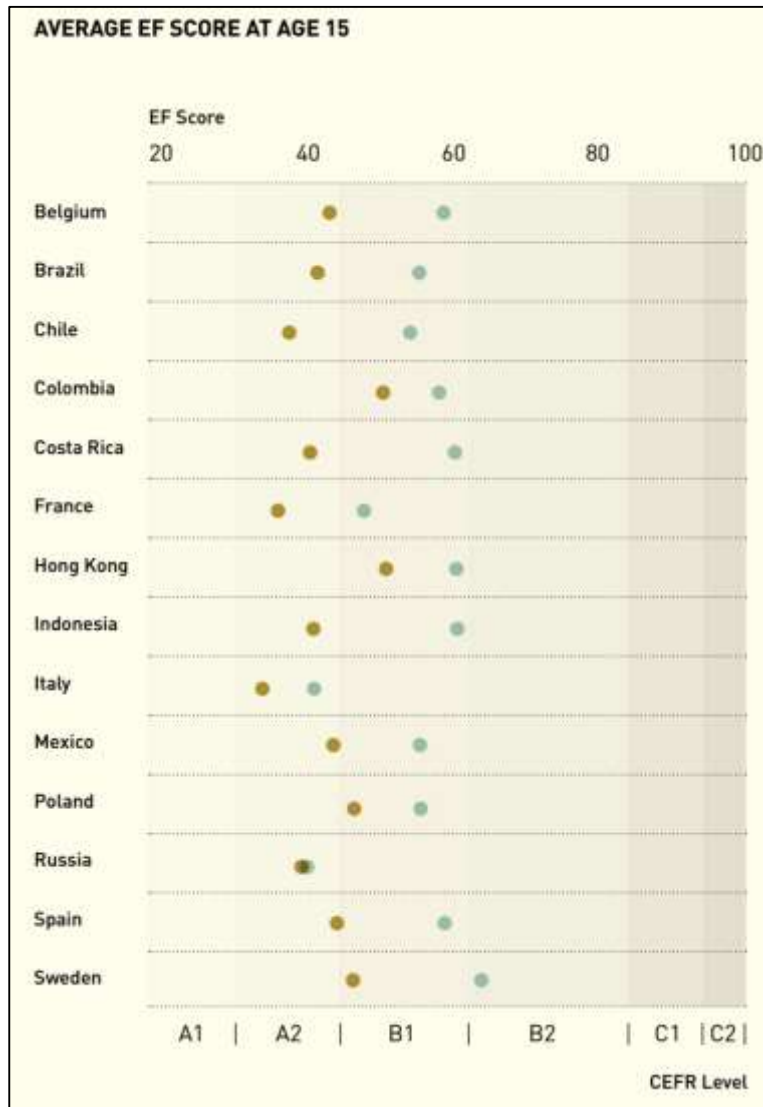


Why are they here?

Reasons for studying English



2e – Overseas state school problems



Challenges in nonEU state schools

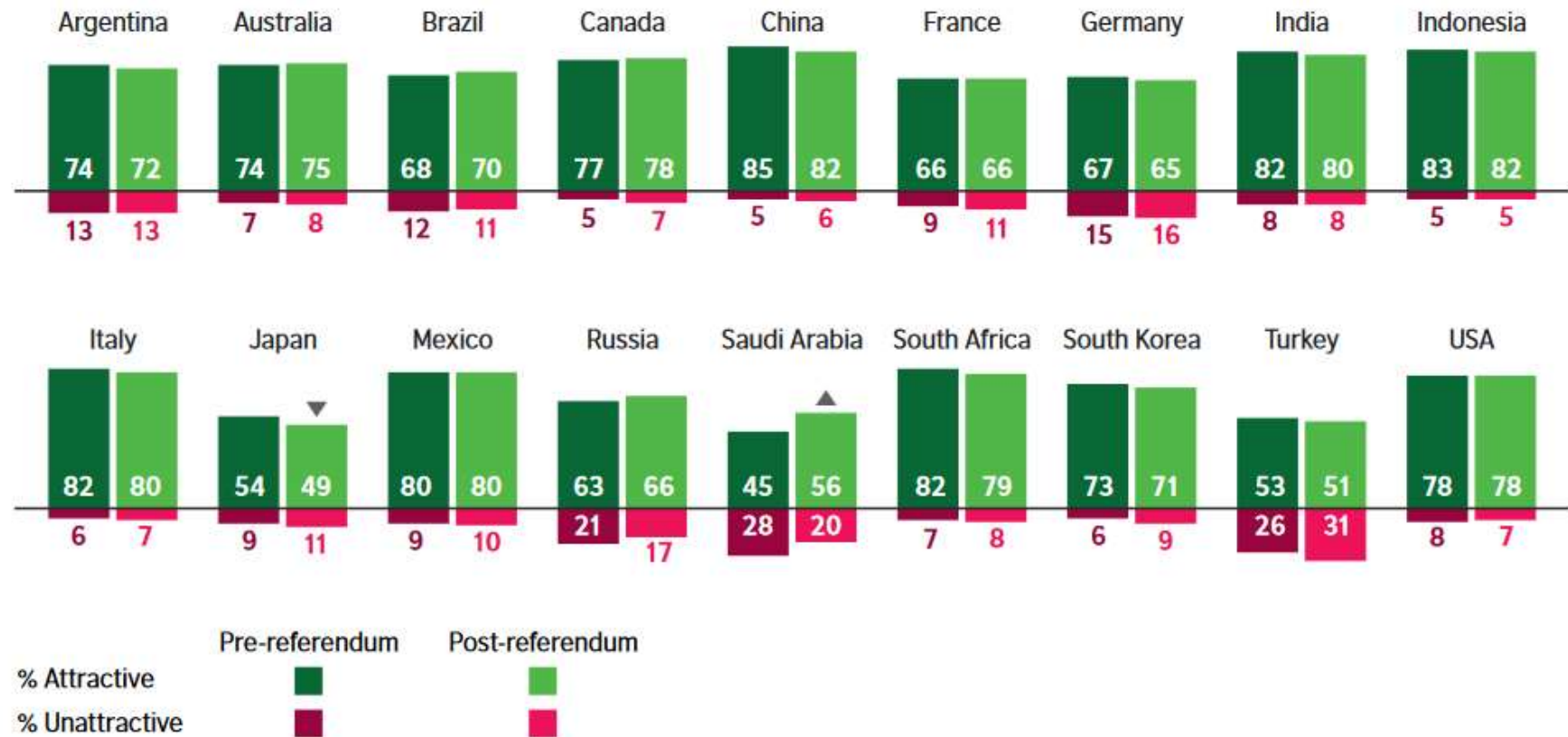
- Classes of 40-50
 - Insufficient class hours - 'Drip feed' teaching eg 2-3 x 40mins per week
 - Lack of English exposure outside school
 - Multiple choice exams for English grading
 - Low learner outcomes at 18
 - Low student graduation levels at BA degree
 - Students unprepared for post-grad study
 - Graduates unprepared for international company world
-
- Teachers demotivated and overstretched - lack of investment in teachers
 - Teachers underpaid – linguists tempted to other jobs
 - Over-theoretical PRESETT
 - Teacher language proficiency
 - Lecturers/professors unprepared for EMI



2f – UK experience valued

Figure 2: UK attractiveness

How attractive overall do you find the UK?



British Council 2017

2g – Digital UK

IN NUMBERS

DIGITAL TECH ECONOMY

1.56m jobs¹

Job creation **2.8x**
faster than the rest of the
economy (2010-2014)



£50,000

Almost £50K average
advertised salary²

36%


higher than the national
advertised average²

41%

Digital tech
jobs exist within
non-digital
industries¹

DIGITAL TECH INDUSTRIES

£161bn
turnover³

32% 
Grew 32%
faster than
the rest of
the economy
(2010-2014)³

58,000

identified active digital
tech businesses⁴

TOP SECTORS⁴

17%  App & Software
Development

12%  Data Management
& Analytics

11.5%  Hardware, Devices
& Open Source
Hardware

DIGITAL TURNOVER TOTAL³

LONDON
£62.4bn

READING & BRACKNELL
£10bn

BRISTOL & BATH
£8.2bn

MANCHESTER
£2.2bn

BIRMINGHAM
£1.8bn

DIGITAL TURNOVER GROWTH (2010-2014)³

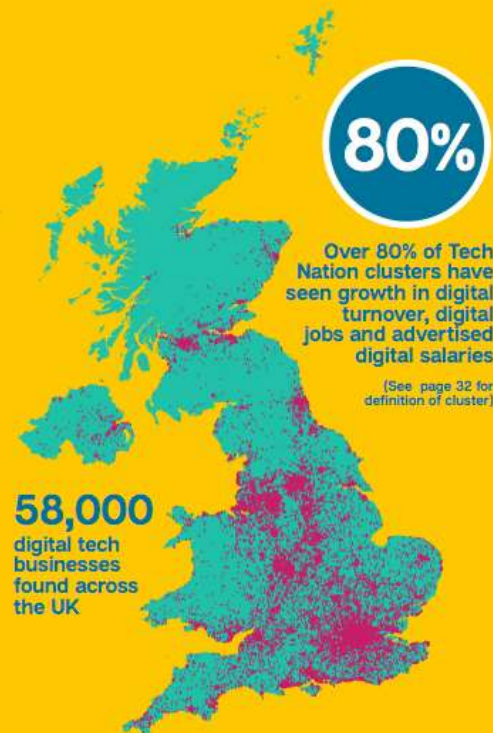
SOUTHAMPTON
+180%

TRURO, REDRUTH & CAMBORNE
+153%

DUNDEE
+129%

LONDON
+101%

BRISTOL & BATH
+53%



DIGITAL JOBS¹ TOTAL

LONDON
328,223

MANCHESTER
51,901

READING & BRACKNELL
40,440

BIRMINGHAM
36,768

BRISTOL & BATH
36,547

PRODUCTIVITY³ (SALES PER WORKER)

BRISTOL & BATH
£296,340

LONDON
£205,390

READING & BRACKNELL
£196,800

SOUTHAMPTON
£171,720

OXFORD
£170,460

DIGITAL SALARY² GROWTH (2012-2015)

LEEDS
+29%

NEWCASTLE & DURHAM
+27%

SUNDERLAND
+26%

EDINBURGH
+26%

SOUTHAMPTON
+25%

Language policy

3 - What 's happening overseas?

Policy components include:

- Goals of English programmes
- Which standards are set
- Targets for learner outcomes
- When English begins
- How much time is spent
- How budgets are prioritised
- How teachers are trained
- Which content is taught
- How learners are measured
- How teachers are measured

We need a **ThinkTank** operation to keep track of Language Policy changes in our key markets

Policy trends

Language policy changes

- Ministry of Education reform ambitions
- EYE programmes
- EMI expansion
- MTB-MLE directions
- Large-scale teacher upskilling

A clear driving force has been the push towards language for career development... students want to put the language into 'action'

Study Travel magazine

Rise of instrumental English

- Decline of general English: ENPP
- Rise of ESPs
- Link to content (CLIL/CBI)

Digital disruption & adaptivity

- Personalisation
- Adaptive learning/testing
- Auto-marking research

Policy targets for social goals

Learners:

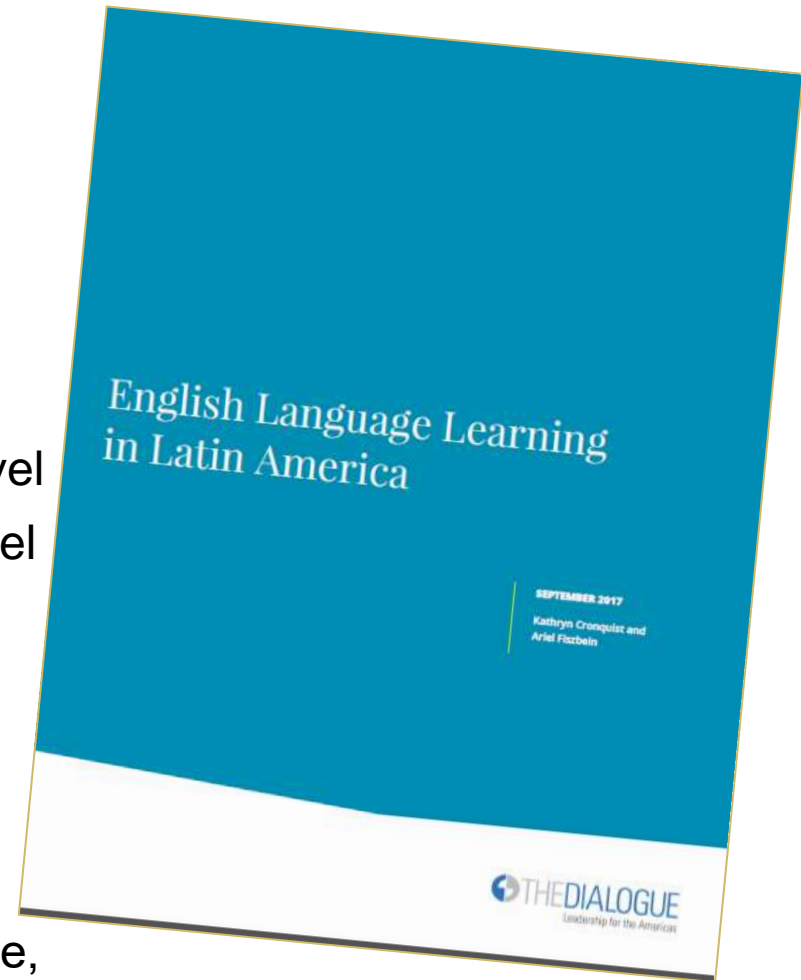
- Reaching min. B1 at 18
- Reaching min. B2 at BA graduation

Teachers:

- Entering teacher training with min. B2 level
- Leaving teacher training with min. C1 level

Society:

- A bilingual workforce who can compete internationally
- Globally-oriented, multilingual citizens who gain access to the world's knowledge, employment and business opportunities



4 - Reasons to be worried about UK

External factors, harder to influence:

- Political issues:
 - Visas
 - Value of £
 - Brexit
- Economic issues:
 - price sensitivity
 - cheaper nonUK alternatives
- Societal issues:
 - Perception of ***value*** of UK experience
 - Fashions in applied linguistic orthodoxy
 - F2F-replacement technology

Reasons to be worried

Internal factors :

- Competitive pressure on pricing
- Zero hours pressure on quality/commitment
- Quality issues in offer / facilities / accommodation
- Pedagogical philosophies (methods, content, activities)
- Perception of UK experience as lived
- Face-to-face replacement technology

New competition



Local Intensive Courses

ANGLOVILLE IN EUROPE >>>

In 2018, Angloville programmes are organised across Europe in 8 countries >>>

- » England
- » Ireland
- » Malta
- » Poland
- » Hungary
- » Czech Republic
- » Slovakia
- » Romania

In each location, for the duration of the English Village programme, a true English-speaking environment is created.

Since 2011, Angloville has grown to become the largest provider of language immersion programmes not just in the CEE region but in the whole of Europe.



Alternative destinations

"**Italians** still strongly think that English, the 'true English', is not the American one, and it has to be studied in the UK if possible.

With wealthier families the story changes quite a lot; these people know what is going on with the English language market and trust to study in **Dubai, Philippines, Malaysia** because they know that very often the institutions and staff are the same as in Europe or US, sometimes even better."



"**Dominanta** is an agency in Russia. The idea of taking English courses in 'third' countries started a couple of years ago.....

Now we offer English in our partner schools in **Spain** because the prices are very attractive, no visa problems and the country is well known to **Russians**, so it helps in marketing programmes like **English on the Beach.**"

Students First Services, an agency that recruits from the Middle East and Africa told *The PIE News* countries such as **India** and **Malaysia** were starting to attract more students because of their lower costs. "They want their children to have a good education that is at the same time affordable, so they consider India to be good" *The PIE News, April 2017*



Ilyong Bae
Yu-Myung Education Agency, Korea

"In the past, most Korean students went to the US, Canada and UK to learn English. Nowadays, the attractiveness of language training in those countries has been lowered.

Students aim for maximum effect at minimum cost, so some students go to Malta, Philippines and Singapore. 15 per cent of my students go to those cheaper countries."

Alternative learning modes

Why language learning apps are competing with Spotify, YouTube rather than in-country learning

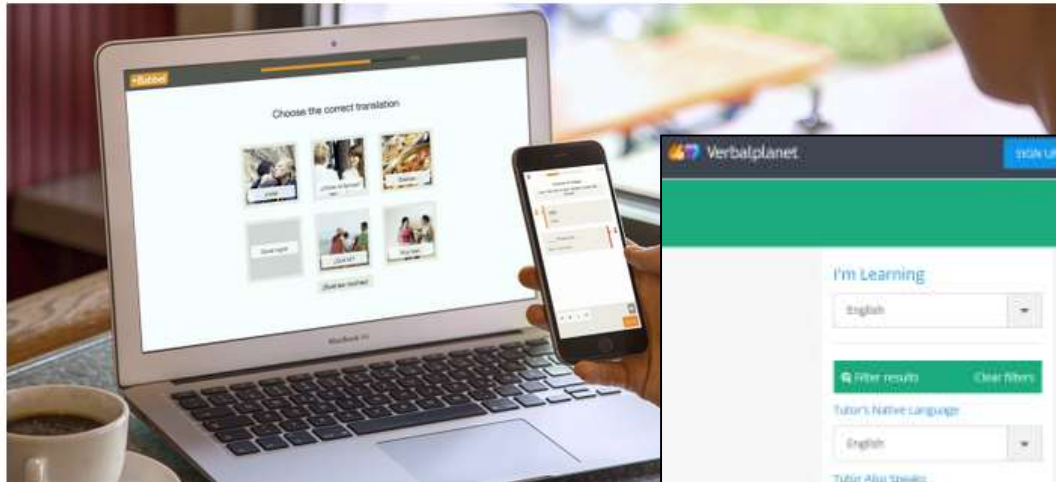
Posted on Jan 12, 2018 by Anton Crane

Posted in Analysis, under

Tagged with Duolingo, Language apps

Bookmark the permalink

If apps were countries, the current champion of international education, the US, which has over one million international students across all levels of study, is recording small numbers when compared with the tens of millions of app users that top language learning apps can now claim.



Online tutoring

A screenshot of the Verbalplanet website. The header includes navigation links: SIGN UP, LOGIN, FIND A TUTOR, LANGUAGES +, CORPORATE, and FAQ +. The main section is titled 'ENGLISH' and 'I'm Learning'. It features a search bar for 'English' and filters for 'Tutor's Native language' (English) and 'Tutor Also Speaks' (Also Speaks). There are checkboxes for 'Trial & Discounts' (Trial lesson, Loyalty Discounts) and a dropdown for 'Order Results by' (Latest Class, Descending). Below this, it says '5 Reasons to get started...' and lists benefits: Free trial lessons, Build confidence, Personal to you, Flexible lesson times, and Experienced teachers. The main content area displays a list of tutors with their profiles, languages, lessons, ratings, and prices. Each tutor entry includes a 'Book now' button.

Tutor Name	Language	Lessons	Rating	Price (45 Min Class)	Discount	Buttons
Coria Lavin	English	1697 Lessons	100% (171 Reviews)	£14.99 / €16.84 / \$20.44	70% OFF	View full profile, Send a message, Get learning plan, Last class: Today, Last login: Today, Online, Trial Available, Discounts Available, Book now
Rosemary Palmer	English	1531 Lessons	100% (111 Reviews)	£25.25 / €28.37 / \$34.44	-	View full profile, Send a message, Get learning plan, Last class: Today, Last login: Today, Offline, Trial Available, Discounts Available, Book now
Matthew Roberts	English	2590 Lessons	950% (177 Reviews)	£18.99 / €21.34 / \$25.30	50% OFF	View full profile, Send a message, Get learning plan, Last class: Today, Last login: Today, Online, Trial Available, Discounts Available, Book now
Danielle Asharma	English	888 Lessons	100% (175 Reviews)	£14.99 / €16.84 / \$20.44	90% OFF	View full profile, Send a message, Get learning plan, Last class: Yesterday, Last login: Yesterday, Online, Trial Available, Discounts Available, Book now

‘Why should I go to the UK?’

Lack of UK-specificity

- ‘I can study in my own country’s language schools’
- ‘I can do intensive immersion courses in my own country’
- ‘My local teachers have the same CELTA training’
- ‘My local teachers use the same CUP/OUP/etc textbooks’
- ‘I can get authentic language input online – video, audio, text’
- ‘I can get authentic free conversation with an online tutor’
- ‘I can do a structured self-study course online, with written/spoken tutor input & group interaction’

Why study in UK

Ten reasons to study English in the UK

1 **The UK has the largest range of English language courses in the world.** You can study IELTS or General English – or English with law, football, art and design, horse-riding, tennis...the list is endless. Find your perfect course at www.englishuk.com.

4 **You can live with a friendly family, in a student residence, or private accommodation.** Your course provider will help you make the right choice.

7 **... and a fantastic place to explore.** We have beautiful landscapes, great museums, lively cities and colourful history, all within easy travelling distance.

9 **Studying English in the UK raises your chances of getting a university place here.** Almost 60 per cent of international students who successfully apply to UK universities are already studying here, usually on English language or international foundation year courses.

2 **British qualifications are internationally recognised and valued.** They will boost your career and your salary, no matter where you work.

5 **Studying in Britain is great value for money without compromising on quality.** Use the course finder at www.englishuk.com.

8 **Our cities are the most cosmopolitan on Earth.** Study here and you'll make friends and sample food from all over the world.

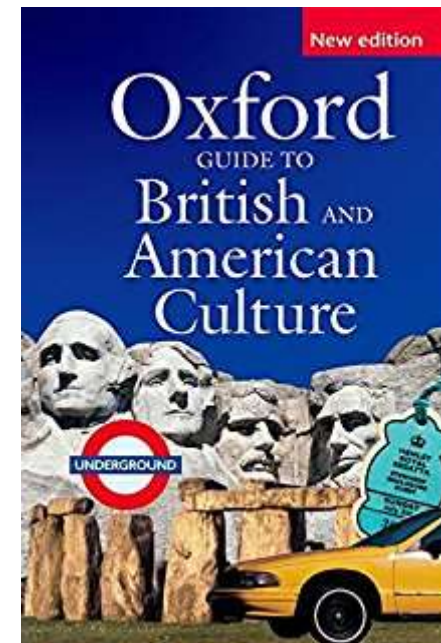
3 **The UK has some of the best English teaching centres in the world.** Whether you choose a university, a state college or a privately-run centre, you'll find the latest teaching methods as well as traditional techniques.

6 **The UK is a great place to visit.** Grand ceremonies, like the Changing of the Guard at Buckingham Palace, are open to everyone – and so is an evening in a cosy British pub. International students find a very warm welcome here, and tell us how friendly British people are.

10 **The UK is the home of the English language.** Where else would you want to learn it?

More UKness in courses?

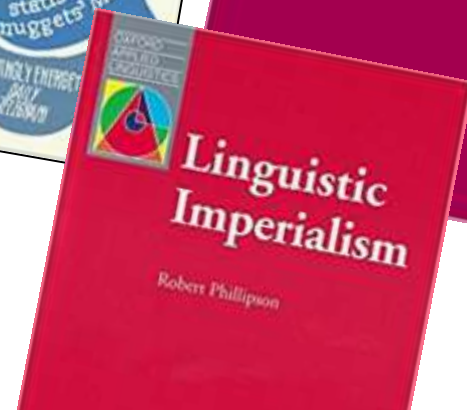
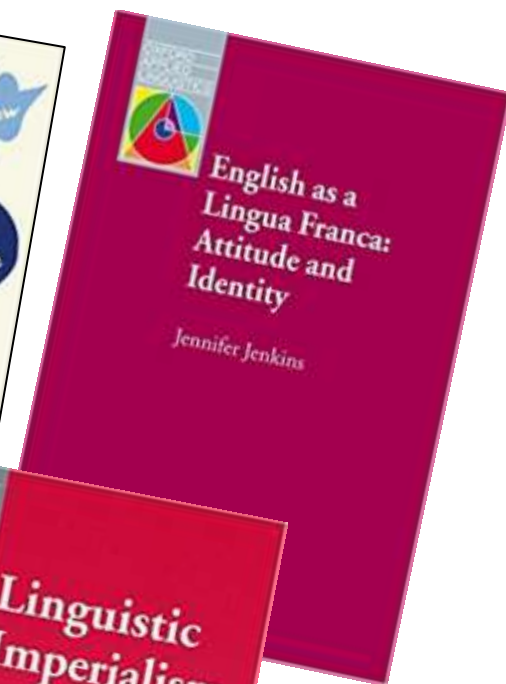
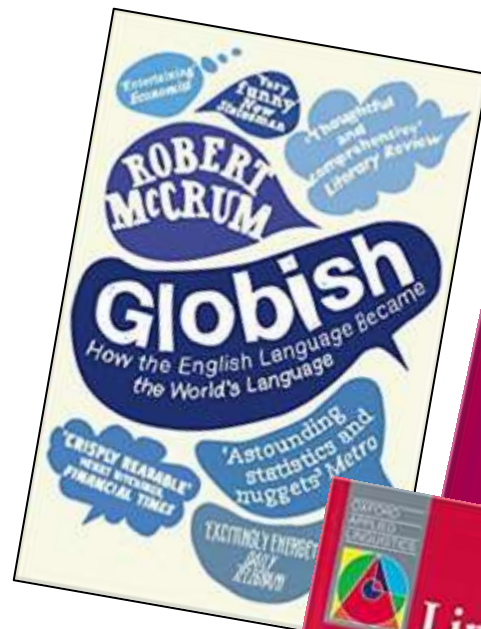
- Business links – famous companies, products, inventions, innovators eg Herman Hauser (CAM), Brunel etc
- Culture, folk music, folk art, famous writers
- Links to ethnic community topics & personal connections – Asian food/music, Caribbean art/food, Welsh & Scots history, Pakistani guest lecturers etc
- History & place in the world
- Visits to cathedrals/castles/music venues
- *‘Every lesson should remind learners that they are in the UK, not elsewhere’*



Which English?

Models?

- UK & Anglo varieties
- World Englishes
- Globish?
- ELF - undermines value of 'standard' English
- Multicultural London English (MLE)



Issues?

- Welcome explicit accent /regional diversity
- Balance shared & English ownership
- Address linguistic imperialism concerns
- Avoid undermining value of UK experience



5 - Innovation: offer

What we can change

Attitudes, perceptions:

- Perception of UK experience
- Responses to Brexit, news, media gossip
- Perception of UK school(s) in student's market

UK learning offer:

- Product range
- Service quality
- Customer service quality/style
- Technology
- Lived experience of learning
- Emphasise UK context & culture

Change recent perceptions

Brexit:

- Impact on enrolments? 2017 is upwards
- Impact on welcome? BC report is positive
- Don't run down the UK: need to play down fears of xenophobia
- Don't run down Leavers: they may be host families

Spin: Present positive image of UK as diverse, vibrant, welcoming, outward-looking, entrepreneurial etc

Dispel Myths:

Work with agents to spread positive image and dispel myths about:

- Leavers xenophobic
- Students not welcome
- EU tourists pay for visas
- EU residents leaving UK in panic

Spin: UK is leaving EU, not Europe

Change pedagogy

Principles

- Approaches to assessment & short-term progression
- Approaches to structure, intensity of course, learning load (age-dependent)

Course

- Curriculum content needs to be student-centred and related to their real needs
- More emphasis on spoken output than skills development
- More time on task through out-of-class digital learning and activity learning
- Increased emphasis on Pronunciation and 'Accent Reduction'

Materials

- Need to be more easily tailored to student(s)
- More local material (A3 units)
- More UK-specific contexts



Change materials & content

- Textbooks – more UK specific?
Too many global topics?
- Materials & content should reflect anticipated use of the language
- Propose an EnglishUK survey on cultural context
- Contradiction between ‘cultural neutrality’ & ‘please come to UK to study’
- Students are **global** in outlook but **locally** focused for this course



Future of teaching materials



**The A3
printer**

Intercultural competences

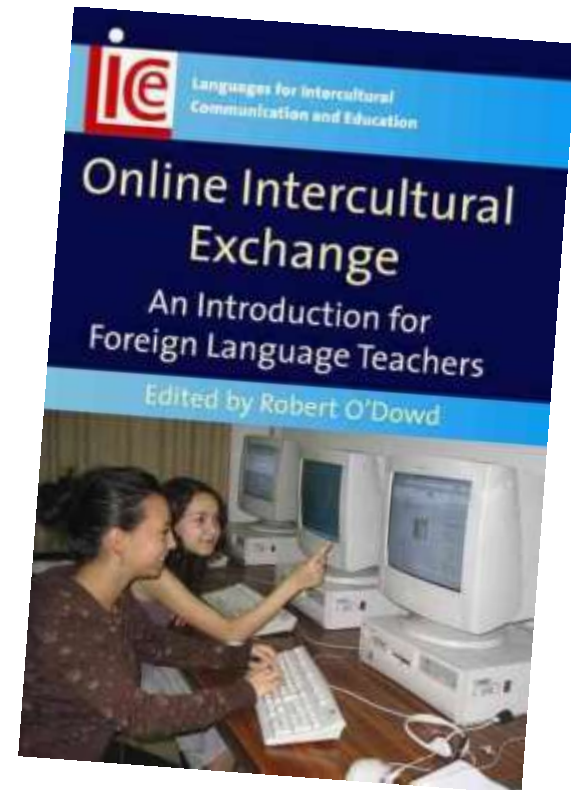
Individual-oriented culture

- Personal goals valued over group goals
- Values autonomy
- Few obligations to others
- Confrontation acceptable

Group-oriented culture

- Group goals valued over personal goals
- Values inter-dependence
- Many obligations to others
- Harmony expected

G.Hofstede



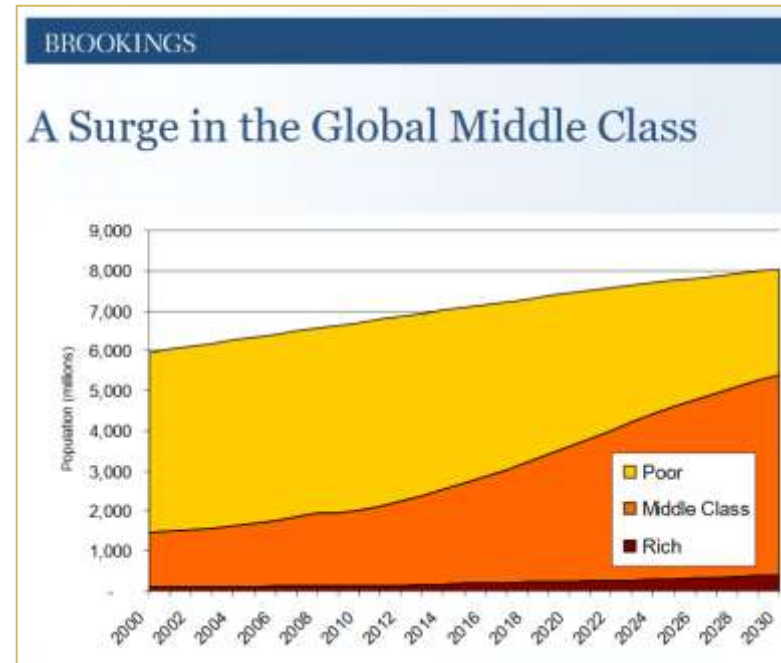
- **Offer:**
Class content on interculture
- Activities comparing C1 (student's home culture) vs C2 (UK culture)
- Tandem programmes in school city
- CPD in Intercultural literacies

Innovation: New Markets

The emerging middle classes

The Top 5:

- China
- India
- Indonesia
- Nigeria
- Philippines



Africa: Middle class doubles by 2030 to 0.5 – 1 billion

India: Middle class market bigger than USA or China by 2039

Asia: Middle class doubles by 2030 to 3.5 billion

S. America: Slower increase in middle class

“Over the next two decades, the middle class is expected to expand by another three billion, coming almost exclusively from the emerging world.” *Ernst & Young*

TOP 20 HOME COUNTRIES OF NON-UK STUDENTS, 2015–16

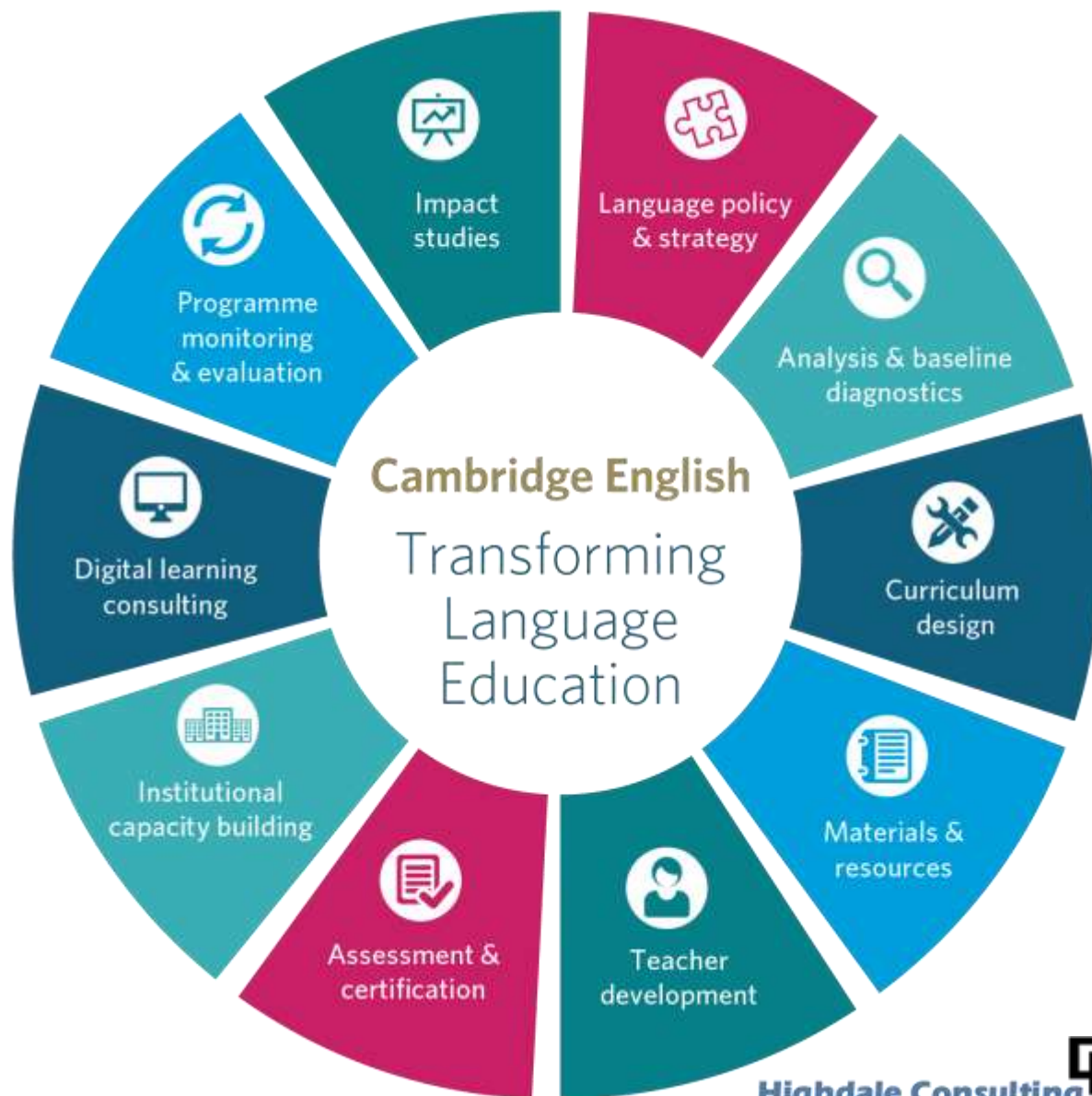
In 2015–16, the top six home countries of non-UK students were China – accounting for 21% of non-UK students – Malaysia, the United States, India, Hong Kong and Nigeria (accounting for 4% each).

Country	Count	Percentage
 China	91,215	21%
 Malaysia	17,405	4%
 United States	17,115	4%
 India	16,745	4%
 Hong Kong	16,745	4%
 Nigeria	16,100	4%
 Germany	13,425	3%
 France	12,525	3%
 Italy	12,135	3%
 Ireland	10,245	2%

Country	Count	Percentage
 Greece	9,790	2%
 Cyprus	9,140	2%
 Saudi Arabia	8,570	2%
 Spain	7,840	2%
 Singapore	7,540	2%
 Romania	7,200	2%
 Bulgaria	6,195	1%
 Thailand	6,095	1%
 Canada	5,980	1%
 Poland	5,655	1%

The ELT value chain

**Innovation:
Capacity-
building**



Take Aways – 5 areas of focus

- 1 **TAILOR** learning to individuals' needs, real lives & work skills & ambitions
- 2 **BUILD** link to new markets to gain students from unfamiliar new sources
- 3 **ENHANCE** the UK character of the learning & lived experience: make more visible the added value of being in the UK
- 4 **INNOVATE** in course design, content, materials & method
- 5 **FOCUS** more on spoken competence, phonology & communication skills



Thank you!

Comments:

michael@highdale.org

If you would like a copy
of the presentation:

www.michaelcarrier.com

Digital Language Learning &
Teaching

www.amazon.co.uk

