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

- 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

- General English
- Business & Professional English
- English Plus
- EAP
- ESP
- One-to-one

Graph showing student weeks by country and year:
- USA
- UK
- Australia
- Canada
- Ireland
- New Zealand
- Malta
- South Africa

The graph compares student weeks from 2012 to 2016 for each country.
Why are they here?

Reasons for studying English

- Work
- Study in target country
- Study elsewhere
- Pleasure

Australia
Malta
UK
USA
2e – Overseas state school problems

**Average EF Score at Age 15**

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**Plateau Effect (Latin America)**

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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 work

- 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?

Argentina | Australia | Brazil | Canada | China | France | Germany | India | Indonesia
---|---|---|---|---|---|---|---|---
74 | 72 | 74 | 75 | 68 | 70 | 77 | 78 | 85 | 82 | 66 | 66 | 67 | 65 | 82 | 80 | 83 | 82
13 | 13 | 7 | 8 | 12 | 11 | 5 | 7 | 5 | 6 | 9 | 11 | 15 | 16 | 8 | 8 | 5 | 5

Italy | Japan | Mexico | Russia | Saudi Arabia | South Africa | South Korea | Turkey | USA
---|---|---|---|---|---|---|---|---
82 | 80 | 54 | 49 | 80 | 80 | 63 | 66 | 45 | 56 | 82 | 79 | 73 | 71 | 53 | 51 | 78 | 78
6 | 7 | 9 | 11 | 9 | 10 | 21 | 17 | 28 | 20 | 7 | 8 | 6 | 9 | 26 | 31 | 8 | 7

% Attractive | % Unattractive
---|---
Pre-referendum | Post-referendum

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 average³

41%

Digital tech jobs exist within non-digital industries⁴

**DIGITAL TECH INDUSTRIES**

£161bn turnover³

Grew 32% faster than the rest of the economy (2010-2014)²

32%

**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 JOBS¹**

LONDON 328,223

MANCHESTER 51,901

READING & BRACKNELL 40,440

BIRMINGHAM 36,768

BRISTOL & BATH 36,547

**PRODUCTIVITY²** (SALES PER WORKER)

LONDON £296,340

LEEDS +29%

MANCHESTER £205,390

NEWCASTLE & DURHAM +27%

READING & BRACKNELL £196,800

SUNDERLAND +26%

BIRMINGHAM £171,720

EDINBURGH +26%

BRISTOL & BATH £170,460

SOUTHAMPTON +25%

**DIGITAL SALARY²**

LONDON

MANCHESTER

READING & BRACKNELL

BIRMINGHAM

BRISTOL & BATH

**DIGITAL TURNOVER TOTAL³**

LONDON £62.4bn

READING & BRACKNELL £10bn

BRISTOL & BATH £8.2bn

MANCHESTER £2.2bn

BIRMINGHAM £1.8bn

**DIGITAL TURNOVER GROWTH (2010-2014)²**

SOUTHAMPTON +180%

TRURO, REDRUTH & CAMBORNE +153%

DUNDEE +129%

LONDON +101%

BRISTOL & BATH +53%

80%

Over 80% of Tech Nation clusters have seen growth in digital turnover, digital jobs and advertised digital salaries

(See page 32 for definition of cluster)

58,000 digital tech businesses found across the UK

London 328,000

Financial tech, social networks, digital media

Shazam, Citymapper, Deliveroo, Transferwise

Manchester 52,000

App development, digital marketing, digital entertainment

UKFast, PushDoctor, Apadmi

Reading 40,000

Cybersecurity, business software, data analytics

Cloud Direct, Fantoo

Bristol/Bath 37,000

Education tech, semiconductors, video games

Amazon, HP, Oracle, Unity, Tribal

Edinburgh 21,000

Financial tech, health tech, e-commerce

Amazon, Rockstar, Toshiba, Skyscanner

Cambridge 19,000

Artificial intelligence, internet of things, data analytics

ARM, Apple, Amazon, Microsoft, Qualcomm, Spotify, Thales, Darktrace

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¹ Source: Tech Nation

² Source: Department for Business, Energy & Industrial Strategy (BEIS)

³ Source: Tech Nation

⁴ Source: Tech Nation

⁵ Source: Tech Nation
3 - What’s happening overseas?

Language policy

*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

**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

A clear driving force has been the push towards language for career development… students want to put the language into ‘action’

*Study Travel magazine*
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 non-UK 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
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

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
‘Why should I go to the UK?’

- ‘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

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.

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

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.

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.

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

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.

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

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

9. Studying English in the UK raises your chances of getting a university place here. Almost 80 per cent of international students who successfully apply to UK universities are already studying here, usually on English language or international foundation year courses.

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
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

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**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
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).

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<td>Poland</td>
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The ELT value chain

Innovation: Capacity-building

- Impact studies
- Language policy & strategy
- Analysis & baseline diagnostics
- Curriculum design
- Materials & resources
- Teacher development
- Assessment & certification
- Institutional capacity building
- Digital learning consulting
- Programme monitoring & evaluation

Cambridge English
Transforming Language Education

Highdale Consulting
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