

Summer Language Schools 2022



TARGET
ENGLISH
INTERNATIONAL



James Hordon - Director - Target English International



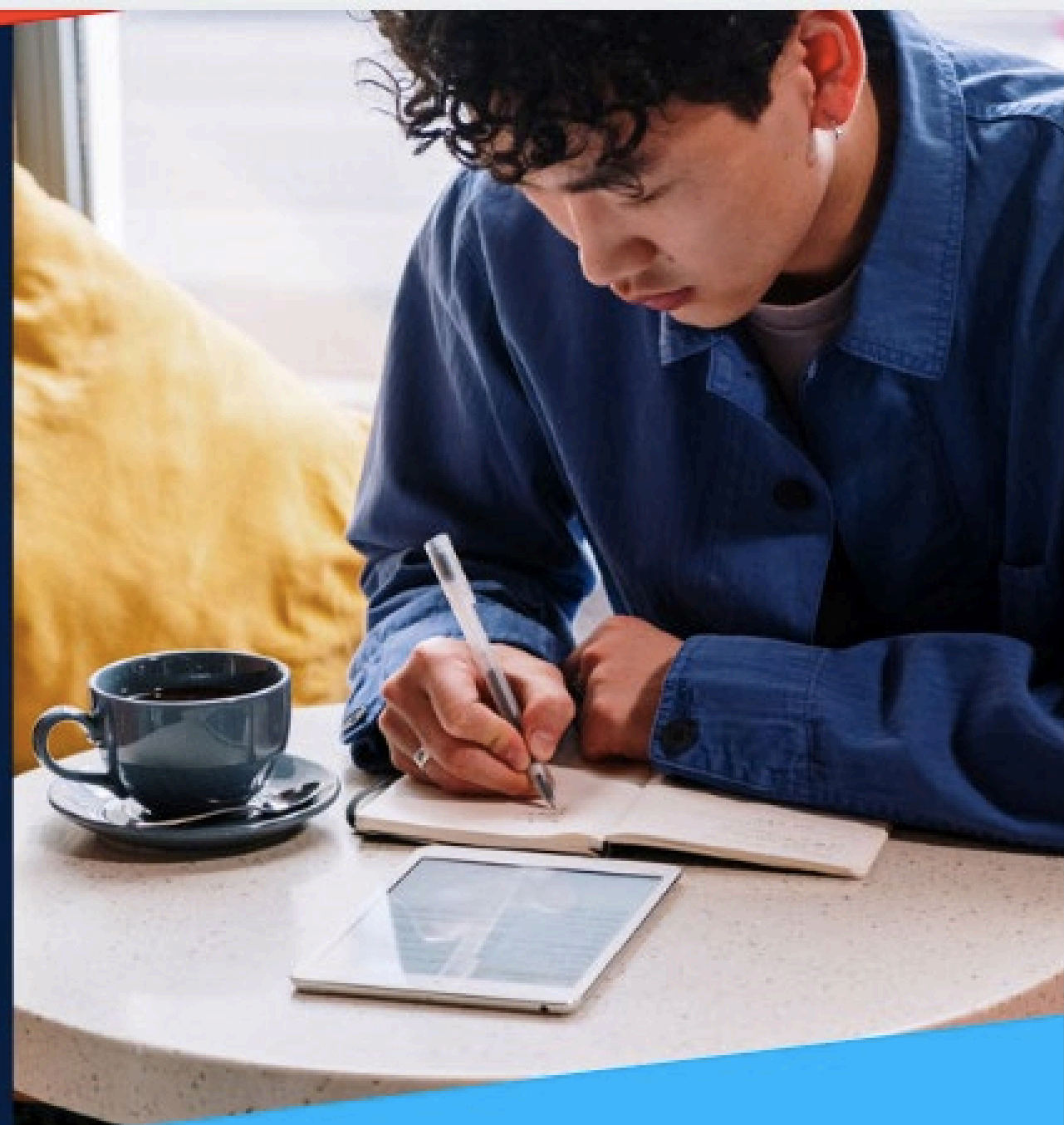
Educate, Inspire, Enrich

Tregarran Percival - Sales & Marketing Director - UKLC



Today's Agenda

- Intro
- Issues to address
- The Market in 2022 – Summer Schools for Juniors (U18s)
- Case Study – Italy
- Case Study – Hungary
- Operating a Summer School in 2022 with COVID-19
- Panel Discussion



- What is happening in the language market compared to 2019?
- Is there going to be a summer school at my venue in 2022?
- How many students will there be?
- Expectation from language schools and agents/parents?
- How should we operate (COVID-19)?
- How will we manage an outbreak on site?
- What does the recent announcements re Omicron and travel changes mean for 2022 summer school bookings?

Issues to address

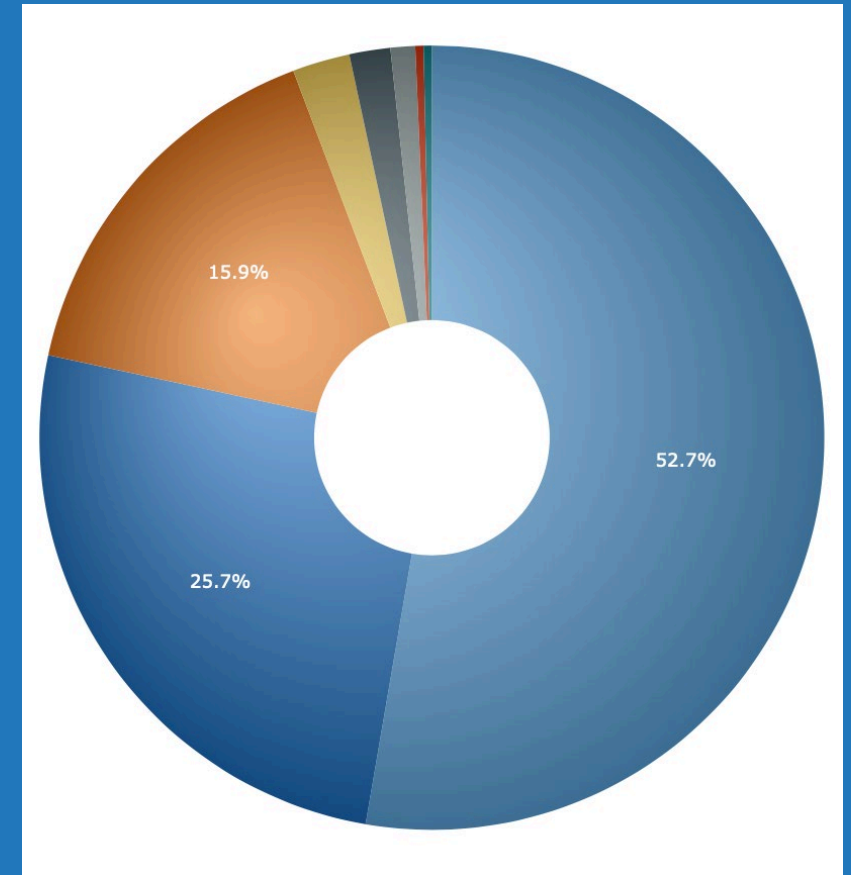
2022 Sales Season



The market in 2022

- ELT is a strong sector for the UK. £1.4bn p.a. in 2019 - 70% in Q3.
- 2022 – Demand is there after 2-year break for both parents and teenagers. Many students issued vouchers in 2020
- UK remains the leading destination for study holidays, however Brexit and Covid-19 have had a positive impact on the popularity of other competitive destination, such as Ireland
- Group statistics for 2022 from one of the leading agents in Italy (the largest source market):

UK – 52.70% (156 groups)
Ireland – 25.65% (76 groups)
USA – 15.9% (47 groups)
Italy – 2.36% (7 groups)
UAE – 1.69% (5 groups)
Cyprus – 1.01% (3 groups)



Source: Master Studies Worldwide

Case Study - Italy

- Italy remains one of the leading markets in the ELT industry, sending over 130,000 students in 2019
- Overall, the number of private sector students decreased by 85% in 2020
- Positive feedback from Italian agents that groups want to travel
- Private Groups
- INPS

GENERAL OVERVIEW

TOP SOURCE MARKETS

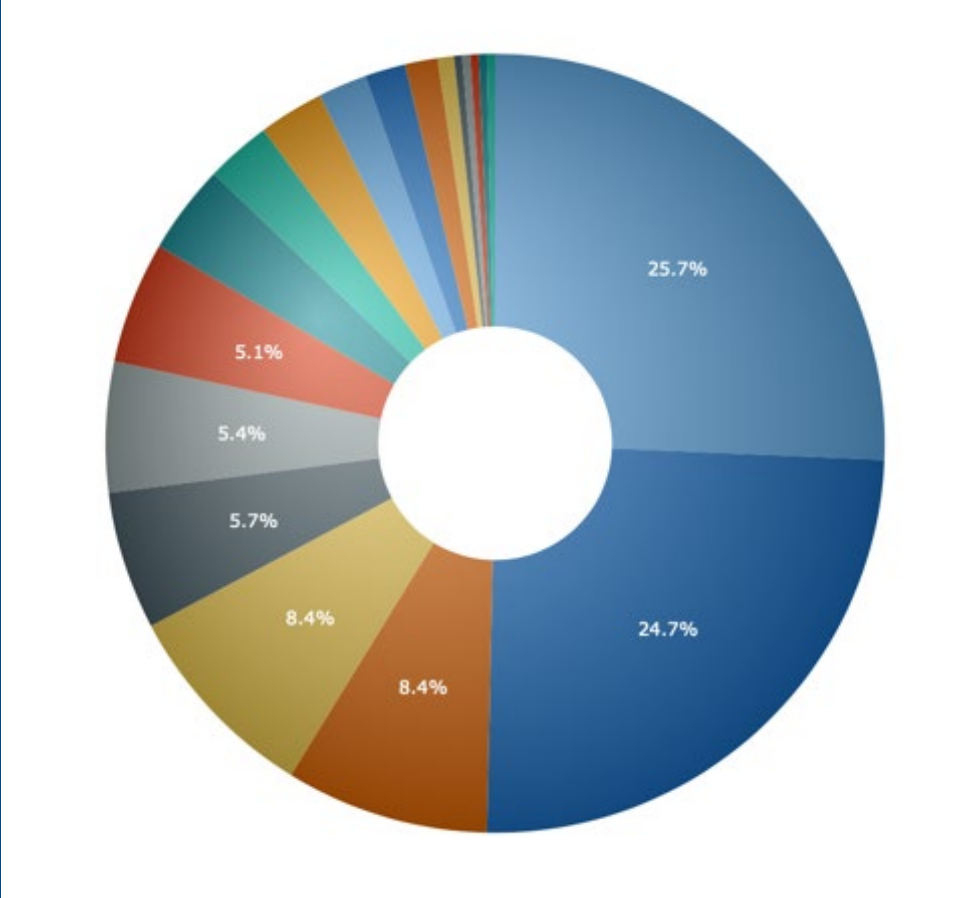
Table 2: Student weeks, students and average length of stay (weeks) by source market (rank by student weeks)

Rank	Country	Student weeks (2018)	Student weeks (2019)	Share (% , 2019)	Student numbers (2018)	Student numbers (2019)	Share (% , 2019)	Average length of stay (2019)
1	Italy	258,064	260,043	14.2%	127,972	135,089	26.6%	1.9
2	China	204,225	234,066	12.8%	47,372	51,460	10.1%	4.5
3	Saudi Arabia	164,892	194,833	10.6%	18,974	19,565	3.9%	10.0
4	Spain	122,850	114,358	6.2%	46,750	48,461	9.5%	2.4
5	France	89,525	88,174	4.8%	35,812	33,630	6.6%	2.6
6	Japan	78,568	80,484	4.4%	14,396	15,443	3.0%	5.2
7	Turkey	87,072	64,343	3.5%	14,518	10,056	2.0%	6.4
8	Switzerland	70,501	62,721	3.4%	17,006	15,879	3.1%	3.9
9	South Korea	70,898	62,284	3.4%	7,700	7,183	1.4%	8.7
10	Brazil	63,837	60,077	3.3%	13,955	13,338	2.6%	4.5
11	Germany	60,301	55,707	3.0%	31,374	30,479	6.0%	1.8
12	Russia	46,357	53,824	2.9%	17,808	21,330	4.2%	2.5
13	Thailand	30,768	32,274	1.8%	4,975	5,132	1.0%	6.3
14	Kuwait	33,234	29,150	1.6%	3,351	3,276	0.6%	8.9
15	Colombia	31,410	27,363	1.5%	3,145	2,544	0.5%	10.8
16	Oman	25,880	26,861	1.5%	3,366	3,294	0.6%	8.2
17	Poland	32,489	26,021	1.4%	6,635	6,646	1.3%	3.9
18	Taiwan	27,256	25,454	1.4%	4,513	4,825	1.0%	5.3
19	Romania	7,676	18,869	1.0%	1,628	2,175	0.4%	8.7
20	Argentina	24,576	18,618	1.0%	7,883	5,924	1.2%	3.1

Infographics 1

Leading UK companies in the Italian market currently:

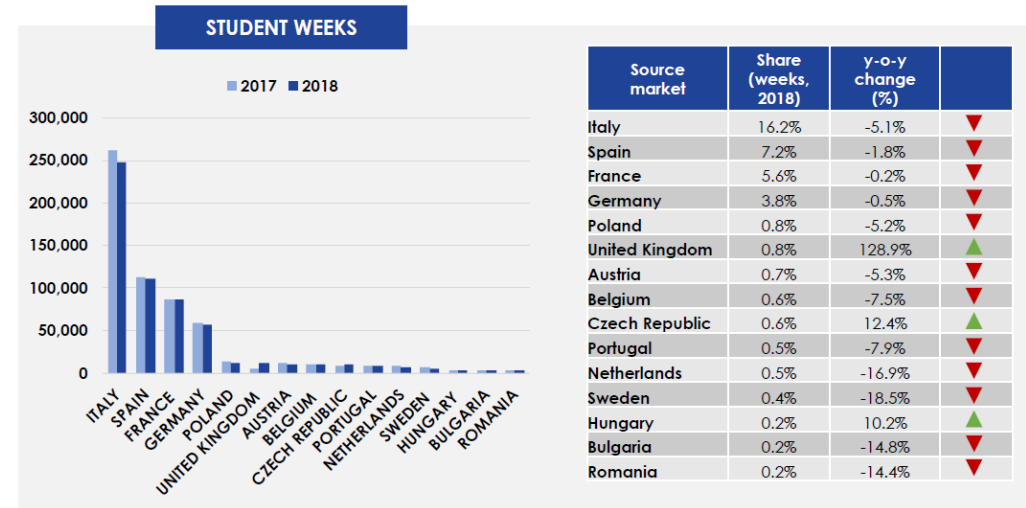
- School 1 (Ireland) – 25.68% (76 groups)
- Target English International – 24.66% (73 groups)
- School 3 (USA) – 8.4% (25 groups)
- School 4 (UK, USA) – 8.4% (25 groups)
- UKLC – 5.74% (17 groups)
- School 6 (UK) – 5.41% (16 groups)
- School 7 (UK) – 5.07 (15 groups)



Source: Master Studies Worldwide

Case Study - Hungary

UK ELT: TOP EU SOURCE MARKETS (PRIVATE SECTOR)



Source: English UK, 2019

- Despite Covid-19 impact on the industry, there are emerging markets, most exciting is Hungary
- Positive impact on ELT – offsets markets with more obstacles to travel in 2022 – esp China and Russia
- 60,000-70,000 students expected into the UK.
- 17th June – 31st August
- Bookings will be dispersed across the whole of the UK!

Operating a Summer School in 2022: COVID-19

1. Cooperation: Host Venue & Client
2. How to meet expectations and stay safe
3. Managing an outbreak
4. Changes between now and summer 2022

Cooperation: Host Venue & Client

- Collaboration on Covid-19 policies – meeting host and client needs
- Reasonable rates
- Understanding around deposit payments – aim for 2022 is business recovery

- **Personal hygiene**

Group and staff inductions should cover basis of personal hygiene such as ‘hands, face, space & fresh air’

- **Increased cleaning**

Hosts and clients to establish cleaning responsibilities and methods

- **Operating outdoors**

Making use of the excellent outdoor facilities hosts can offer

- **Health & Safety**

Thorough risk assessments and thought out strategies

- **Testing**

Encourage and support testing students

- **Cautious approaches**

Appropriate to take a more cautious approach to face masks and social distancing

How to meet expectations & stay safe

Managing an outbreak

COVID-19 SYMPTOMS

- A high temperature – this means you feel hot to touch on your chest or back.
- A new, continuous cough – this means coughing a lot more for an hour, or 3 or more coughing episodes in 24 hours.
- A loss or change to your sense of smell or taste – this means you've noticed you cannot smell or taste anything, or things smell or taste different to normal.

- Collaborate with hosts on strategies
- Follow guidance from English UK/British Council/Dept of Education/UK Gov

Establish with hosts:

- Isolation location and rules
- Strategy for under 18s
- Strategy for over 18s
- Staff cover
- Testing
- Flexibility – what happens if a group is isolating past their departure date?
- Are there any unvaccinated or vulnerable on site?

Changes between now & summer 2022

- **Recent changes to international travel 30/11/2021:**
 - Vaccinated and under 18s from non-red countries must isolate for two days and do a test before the end of Day 2
 - Non-vaccinated rules remain the same. Tests on arrival, day 2 & day 8. Test and release scheme available
- **What does the recent announcement mean for 2022 summer school bookings?**
 - Agents remain positive and **want to travel**
 - Vaccine has given people more confidence, but group leaders/parents/students need to feel safe in our centres
 - We've learnt that the rules are fast changing and always become less restrictive in the summer months

Any questions?

Thank you for joining
us today.

Contact Us!

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