duolingo english test

PUBLIC FIRST

UNLOCKING THE GLOBAL TALENT POOL

A digital approach to secure English language testing in the United Kingdom

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FOREWORD

LUIS VON AHN
CEO and co-founder, Duolingo

Education is often framed as the great equaliser, but I think it's the opposite. Those with money can access opportunities, and those without cannot.

I grew up in Guatemala, and when I was preparing to apply to university, I had to take an English proficiency exam. There were no test centre seats available in my country, so I had to fly abroad to take it. I was lucky that I was able to afford this, but many others are not.

When Duolingo went public, I said that I plan to dedicate my life to building a future in which, through technology, every person on this planet has access to the best quality of education. Our flagship product, the Duolingo language learning app, is an effort to make progress toward that goal. It's now the most popular way to learn a language worldwide. We don't charge for educational content, so whether you're the richest person in the world or a refugee, you get the same quality of education.

We are working to level the playing field in other areas too. In 2016, we released the Duolingo English Test, the pioneering digital-first, high stakes exam that is both reliable and more accessible than other English proficiency exams. Now, it is accepted by thousands of higher education programmes and it is taken by hundreds of thousands of people around the world.

If there was any doubt before COVID-19 about the need for an accessible and resilient testing system, there is none now. As test centres, along with schools and universities, closed during national lockdowns, alternative approaches had to be found. The Duolingo English Test became an essential tool for English proficiency assessment, with applicants and educational institutions alike relying on our secure online solution.

This resilience is not just crucial in a pandemic; natural disasters and conflict can make cities and regions inaccessible. A testing model that only allows for in-person attendance at a centre that cannot be reached is inequitable, and risks preventing some of the most marginalised students and workers from fulfilling their potential.

The pandemic has also profoundly impacted the way digital solutions to educational challenges have been used and perceived. Our surveys and interviews indicate that the appetite to travel for study and work is not diminishing, but people are more open to online programs than before. The way people live and work, and their expectations of the services they use, has taken a turn toward the digital.

Tests for university admissions or migration need to be secure, and we recognise that some people might think it is not possible for high-stakes tests to be both secure and digital. But through our work on the Duolingo English Test, and our approach that uses both human proctors and cutting-edge AI, we know that it is possible to administer a high-stakes test online. Even traditional test providers, who spent years talking about how online testing could never be secure, are now trying to launch their own online tests.

One of the great injustices of the global education system is that we choose to leave barriers in place that exclude those without resources. At Duolingo, our principal aim is to remove those barriers.

About Luis
Luis von Ahn is the co-founder and CEO of Duolingo, a language-learning platform with the mission to develop the best education in the world and make it universally available. Previously, he has served as the Chief Executive Officer of reCAPTCHA from 2007 - 2009, until its acquisition by Google in 2009. He holds a B.S. in Mathematics from Duke University and Ph.D. in Computer Science from Carnegie Mellon University.

FOREWORD

SIMON LEBUS
Senior Advisor
to Duolingo

The COVID-19 pandemic has changed the way young people think about and experience education. For longer than anyone anticipated, kitchens and bedrooms became classrooms. Every level of student was affected, from primary school to PhD.

There are big questions emerging about the long-term impact of these changes. Is there a greater appetite for online teaching, learning and assessment? Have expectations and practices been changed for good? Are students less inclined to travel abroad to learn, cautious about venturing too far from 'home'? The research undertaken for this report aims to answer these questions, and to understand what the implications might be for the UK.

As part of this study, I interviewed a number of education experts in the UK and abroad. They all agree that, despite the increased use of digital tools, there is no substitute for real-world human interaction. The holistic experience and adventure of study abroad – meeting new people and immersing yourself in a different culture and language – remains hugely appealing.

This view is supported by our surveys and by recent statistics which show that student migration is returning to pre-pandemic levels and that the UK is still a top destination for international study. Indeed, the interviewees' widely held view is that the UK's target of 600,000 overseas students a year by 2030 was always far too cautious.

That said, they also agree that the UK is operating in an increasingly competitive market. Countries like Canada and Ireland are becoming more attractive, as are locations closer to the students in China and India that we surveyed – places like Singapore and Malaysia.

Simultaneously, the pandemic highlighted an over-reliance on the Chinese and Indian markets for international students. Education institutions are diversifying their approach and targeting students in countries in Africa and South America.

So, it is clear that if the UK wants to remain a top destination, we need to ensure that the path to the UK for talented students and skilled workers is smooth and welcoming. We have to keep pace with the policies and practices that allow applicants to demonstrate that they have the attributes required. English language proficiency is one of these requirements but current testing procedures, heavily reliant on in-person attendance at test centres, can often be a significant barrier to an application.

Across generations, the impact of the pandemic has resulted in an increased acceptance that things can be done in a different – and often more effective – way, at home and on a computer. Expectations have changed along with practices, and processes that are seen as inaccessible or, crucially, inequitable will be avoided. This is why we need to urgently consider a digital approach to language testing that helps the brightest talent from all corners of the world benefit from and contribute to a United Kingdom that is truly global.

About Simon
Simon Lebus is a senior advisor to Duolingo. Previously he has spent time as interim Chief Regulator at Ofqual and for sixteen years (2002 - 2018) was Group Chief Executive Officer at Cambridge Assessment. In addition to his work with Duolingo, he sits on the Board of a number of education technology companies.

"[Digitisation] maximises the accessibility of these tests so the UK can meet the growing demand and reach more international talent."

EXECUTIVE SUMMARY

TAKING A DIGITAL APPROACH TO THE UK'S SECURE ENGLISH LANGUAGE TESTING REQUIREMENTS

> The UK remains an attractive place to study and work, offering a strong market economy and a prestigious, high-quality education sector. Despite the impact of COVID-19 on travel and economies, the demand for visa applications to study and work in the UK remains strong. Attracting and securing international talent is a cornerstone of Global Britain's ambition. There are many important markets full of talented individuals with a strong appetite to come to the UK to study or work. That said, any competitive advantage is not a given. The UK government needs to identify and remove residual barriers to attracting talented young people to come to the UK.

The points-based immigration system, launched in January 2021, underpins the UK's new global outlook and requires English language proficiency to ensure students and workers can communicate and learn effectively, and get the most out of their time in the UK.[1] Secure English language testing (SELT) is therefore an important component of the visa qualification process. However, in-person test centres cannot effectively service this demand – and they lack resilience in the face of conflict, natural disasters and public health crises.

Technology now allows for robust, valid and secure digital assessments of language proficiency, and the recent COVID-19 lockdowns have highlighted the value of technology in providing new and effective solutions in education. However, this value is not limited to crisis response, and has far wider benefits. Importantly, digitisation maximises the accessibility of these tests so the UK can meet the growing demand and reach more international talent.

This report outlines the research that identifies these trends, and supports the move to digital English language testing. The research objectives of this report were to understand: migration trends, the issues affecting international students; and the attitudes of young people in India and China, the two largest markets for the UK currently. The report examines the themes of international study, approaches to learning and demand for the English language, factors influencing educational choices, and the accessibility of the secure English language testing required for visa applications.

In addition to original research on the network of SELT test centres using published sources, the project draws on interviews conducted with 12 experts and sector leaders in the field, along with the findings of new opinion research conducted by Public First in two major overseas markets.[2]

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1 (2020) Policy Statement | Home Office | The UK's points-based immigration system: policy statement - GOV.UK (www.gov.uk)

2 Polling for this report took place in November 2021 in India and China, using an unweighted sample of young people aged 16 to 22 years old. Full poll tables are available at www.publicfirst.co.uk

Key findings

The UK is increasingly attractive to international students and skilled workers, and demand has returned after pandemic travel restrictions

After the first pandemic year, significant increases in visa applications to the UK in 2021 indicate that COVID-19 has not permanently depressed international mobility. Recent changes to UK immigration policies have made the UK's migration offer more compelling, especially to individuals in countries like India, Pakistan, and Nigeria.[3] In 2018, Indian demand for visas was less than half that of China. However, it has soared in recent years: increasing to 80,000 in 2019, before jumping to 120,000 in 2021, to match the volume of Chinese applicants. Overall, 2021 has seen a 73% increase in the volume of applicants for UK visas from the top five non-European Union (EU) markets.[4]

"If the trend growth rate from the last fifteen or the last five years continues, the UK could expect to see between 875,000 and 1 million international students enrolling on UK higher education courses by 2029/30."

Data for 2021 shows that the trends for student migration that existed before the COVID-19 pandemic are likely to re-establish themselves. The latest data shows 605,130 student enrolments by non-UK nationals, which exceeds the 2030 target set in the UK government's strategy[5] and is an increase of 9% over 2019/20, with 75% of these from outside the EU, predominantly from China and India.[6]

Future demand is likely to see further rises in international student numbers

If the trend growth rate from the last fifteen or the last five years continues, the UK could expect to see between 875,000 and 1 million international students enrolling on UK higher education courses by 2029/30. A quarter of Indian respondents (29%) surveyed for this report said they were certain they would move abroad to study. Of all those who were considering studying abroad, well over half were interested in going to the UK (60%), exceeded only by the USA (63%). Of those considering studying abroad, a clear majority of Indian respondents (62%) and over half of Chinese respondents (57%) were planning on going within the next two years, indicating a robust pipeline of future applicants.[7] This means the UK can expect to see continued growth in international student migration.

3 (2021) Home Office | News Release | Graduate route to open to international students on 1 July 2021 - GOV.UK (www.gov.uk)

4 (2022) Home Office | Immigration Statistics year ending December 2021 | Migration statistics - GOV.UK (www.gov.uk)

5 (2021) Department for Education | International Education Strategy 2021 (publishing.service.gov.uk)

6 (2022) Higher Education Statistics Agency | Where do HE students come from? | HESA

7 Full poll tables are available at www.publicfirst.co.uk

The longer-term impact of the pandemic on student preferences is still unclear and the global education market will need to adapt

Attitudes to learning have evolved and, according to our polling of young people in India and China, there is more willingness to study online and be taught remotely. The COVID-19 experience has affected some young people's ambition to study overseas. The pandemic has influenced attitudes to online learning, with new models of provision, including a mix of online and in-person learning, becoming popular, according to our polling. There is also support for transnational education provision. Among the young people we polled in China, studying a foreign degree delivered at a university in China is now preferred over studying for a degree abroad.[8]

The ambitions for 'Global Britain' depend on a policy environment and processes that attract and facilitate the movement of talented individuals to the UK

The UK's immigration policy landscape is seeking to grow international education exports and maintain and expand the higher education sector's global appeal. Beyond China and India, other markets are becoming more important, supplying a growing proportion of international students. Chinese demand may be peaking but other countries like Nigeria, Pakistan and India continued to see strong growth in 2021.

However, talented individuals are seeking educational opportunities in a global marketplace, and they have a choice over where they go. Research identifies a rising interest among aspiring international students in other English-speaking countries – notably Canada – as a preferred destination.[9] And students in Asia will also consider other markets like Australia, which will want to make up lost ground from its pandemic closure and is even more reliant on international students than the UK. So, the UK's offer must be compelling and backed up by a migration policy that is open, accessible and appealing.

Language testing centres present significant practical barriers to those trying to access the UK and are not a resilient model

Like many countries, the UK has designed an immigration system that requires applicants to qualify according to set skills criteria, including English language abilities. Ensuring that applicants can easily access a test that demonstrates this proficiency is essential. Across the globe, the current test centre network does not provide equitable access. The SELT network has 1,056 test centres when it is fully operational (as of February 2022), but coverage is patchy.[10] In some countries and regions this presents a significant barrier for users.

The limited number of test centres in countries like Mexico, Brazil and Indonesia means a single centre is serving 20-30 million people or more, usually from an urban location. There are 82 countries with no SELT centres at all, comprising nearly half a billion people. Over a dozen of these are larger countries — like Mali, Angola, Guatemala and Niger — with populations over 15 million people.[11] This means many aspiring applicants must travel internationally just to access the language test needed for a UK visa application.

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8 Full poll tables are available at www.publicfirst.co.uk

9 (2021) Navitas Insights | UK and Canada compete for top spot in the pandemic recovery race – Navitas Insights

10 (2022) Home Office | Prove your English language abilities with a secure English language test (SELT)- GOV.UK (www.gov.uk)

11 Based on 2022 World Bank country data and official SELT provision (Feb 2022) available online at https://www.gov.uk/guidance/prove-your-english-language-abilities-with-a-secure-english-language-test-selt#find-an-approved-test

The pandemic exposed the lack of resilience of the current SELT test centre model. Accessibility challenges were made more acute by sudden test centre closures and the rationing of test availability. In 2021, more than a year after the pandemic began, less than half of the test centres in India were open, and even as recently as February 2022 one third of test centres in China remain closed.[12] Areas experiencing armed conflict have also seen SELT coverage cease, most recently in Afghanistan and now Ukraine.

> "There are **82 countries** with no SELT centres at all, comprising nearly half a billion people."

Cost, distance and inconvenience are disincentives for young people when considering the language testing requirements for UK visas. Current SELT tests delivered at test centres are expensive: the average test cost is equivalent to two months' income in Pakistan and one months' income in India, Nigeria and Vietnam — and that excludes the time and cost to travel often significant distances to reach a test centre.[13]

Digital innovation in the visa process would benefit both users and government agencies, without reducing the English language test's validity or security standards

A cheaper, more convenient test, administered digitally and taken securely at home, would overcome natural barriers that discourage some applicants and allow the UK immigration system to deliver talent maximisation. Digital at-home tests like the Duolingo English Test (DET)[14] would also offer greater resilience in the face of future public health shutdowns, and provide sustained access for individual applicants in countries experiencing social unrest or armed conflict.

> "More than a year after the pandemic began, less than half of the test centres in India were open, and even as recently as February 2022 one third of test centres in China remain closed."

Remote testing is secure and flexible. Providers can set high standards and select only the best applicants, but the pool of talent for the UK would be larger, because many applicants who today are discouraged by the need to travel for a SELT exam would be more likely to apply.

The UK's ambitions for modern delivery of public services involve digitisation of traditional paper-based processes and case files, including in the realm of visas. With the government aspiring to make the UK an innovation leader with the 'best border in the world by 2025'[15] and with Ireland recently announcing that they are accepting digital language test providers for student visas, the UK cannot afford to be left behind.[16]

12 (2022) Home Office | Prove your English language abilities with a secure English language test (SELT)- GOV.UK (www.gov.uk)

13 (2022) IELTS | https://www.ielts.org/en-us/for-test-takers/book-a-test/ | (2022) ETS | https://v2.ereg.ets.org/ereg/public/workflow-manager/schlWorkflow?_p=TEL | (2022) Pearson | https://www.pearsonpte.com/test-centers-and-fees

14 (2022) Duolingo | https://www.englishtest.duolingo.com/

15 (2020) Her Majesty's Government | 2025 UK Border Strategy | 2025 UK Border Strategy – HM Government, December 2020 (publishing.service.gov.uk)

16 (2021) Department of Justice | English language requirements for study visas - Immigration Service Delivery (irishimmigration.ie)

> "In other cases, the pandemic has proven to be an accelerant for underlying trends. This could not be truer than in the English language testing industry, which has seen unprecedented change as a result of the pandemic."

INTRODUCTION

INTRODUCTION

The COVID-19 pandemic profoundly disrupted international mobility. Travel was curtailed, many borders were shut, and schools, universities and workplaces everywhere were forced to pivot their operations by harnessing digital technologies. Some of the turbulence was temporary, with pre-COVID practices beginning to re-establish themselves at the start of 2022. But in other cases, the pandemic has proven to be an accelerant for underlying trends. This could not be truer than in the English language testing industry, which has seen unprecedented change as a result of the pandemic.

Traditional tests have long relied on an in-person, test centre-based model, but COVID-19 saw the industry pivot with several new online products coming to market and the first at-scale opportunity to understand what digital testing products could mean for international student mobility, as well as other forms of migration.

In this paper we look at the impact of the pandemic on student perceptions of English-medium education, international study, modes of learning and secure English language testing. The pandemic has transformed the testing landscape and will have lasting relevance to sponsor institutions like universities, and to immigration policy itself.

Securing the UK's competitive advantage

Developed economies across the world are competing for talent. In the years ahead, countries like the UK need to remain competitive as destinations for talented individuals to migrate to for work or study. This requires a policy environment that welcomes talent, and visa processes that attract and facilitate the movement of talented individuals to the UK. Countries with migration pathways that are slow, difficult to access, bureaucratic and expensive will struggle to attract talented international students and workers.

The UK has an opportunity to cement its global standing and expand its soft power influence in critical emerging markets, with educational exports and the appeal of its university sector being a key selling point. To do this successfully, the UK needs a fair, secure and trusted migration policy, and an efficient and accessible visa process.

Creating an accessible migration offer for global talent

The UK's economy has a strong demand for skills, but the supply of potential migrants is also rising globally as economic growth drives the emergence of an aspirational middle class in middle and lower-income countries. Talented individuals are seeking educational opportunities in a global marketplace and they have a choice over where they go. So the UK's offer must be compelling, and backed up by a migration policy that is open, accessible and appealing.

High levels of migration to the UK are influenced not just by the global appeal and high status of the UK's university system, but also the strong belief among young people in major markets like India and China – as revealed in polling for this report – that English language proficiency is a critical skill for their future life and careers. This scenario should not be taken for granted.

Interviews with key education leaders confirmed a rising interest among aspiring international students in other English-speaking countries – notably Canada – as a preferred destination. And students in Asia will also consider other markets like Australia, which will want to make up lost ground from its pandemic closure and is even more reliant on international students than the UK. The surveys for this report[17] also show more young people in markets like China saying their preferred choice is to study at home via foreign providers. Fundamentally, young peoples' attitudes to how and where to study and develop their careers will impact future mobility flows and the volume of inward migration to the UK. In turn, those trends will impact key sectors for the UK economy, including higher education.

The impact of COVID-19: the return of pre-pandemic migration trends, with some new attitudes and approaches

Compared to the volumes in 2019, the pandemic led to a sudden decline in international travel and student mobility in 2020-21. This posed unprecedented challenges to the UK's higher education (HE) sector. In response, universities adapted their provision and, overall, enrolments in UK HE courses continued to rise.

The pandemic also acted as a catalyst in the broader education sector, with EdTech innovations emerging and existing providers offering digital models. This is evident in the number of English language test providers offering new online exam models to continue to service customers who were unable to attend an exam appointment in person.

And while the pandemic experience reshaped educational provision and spurred the growth of online test offerings, it has also influenced the attitudes of students and young people aspiring to study overseas, as this report explores. Based on our research, young peoples' preferences are already changing, and with them, educational providers are adapting their own offerings. These developments mean that countries like the UK must have a dynamic global education sector that offers a diverse range of study modes that appeal to the international market, and which is underpinned by a visa system that is efficient, accessible and customer-centric.

> "Young peoples' attitudes to how and where to study and develop their careers will impact future mobility flows and the volume of inward migration to the UK."

The long-term impact of the pandemic is still unclear, but it is likely that many trends will re-establish themselves as travel returns to normal, including the high demand for study in the UK which is buoyed by the new graduate route. Migration data for 2021 already demonstrates that

17 Full poll tables are available at www.publicfirst.co.uk

the volume of visa applicants to the UK has rebounded strongly after the drop in 2020.[18]

> "The test centre model has not kept pace with the exponential growth in demand for English language learning, and is no longer able to meet demand, now or in the future."

Reassessing the current language testing delivery model

Post-Brexit, the UK's new points-based immigration system launched on 31 January 2021.[19] This underpins the UK's new global outlook, where the same migration process and criteria now applies to all nationalities. This new system is geared around skills, and English language proficiency is a key pillar. The majority of visa applicants must either demonstrate this skill via a test result, or have it acknowledged with reference to existing qualifications delivered in English. Secure English language testing (SELT), in place since 2010, therefore remains an important component of the visa qualification process.[20] The UK government relies on a network of accredited providers to administer these tests overseas.

The government's strategic goal to attract skilled migrants requires tools like SELT, which serve as a filter to ensure students and workers can communicate and get the most out of their time in the UK, as well as supporting wider community integration objectives. The language testing model should be actively supporting the country's goals to seek out and attract talent – wherever it may be in the world; in practice, however, a test centre model throws up significant hurdles.

This report argues that the test centre model has not kept pace with the exponential growth in demand for English language learning, and is no longer able to meet demand, now or in the future. The test centre model can also exclude those from marginalised groups, by discouraging applicants in rural areas further away from test sites and those with disabilities, where the cost and long travel distances present significant challenges. Delivering the SELT process exclusively via examinations invigilated in test centres has now become a barrier to talent and a brake on the policy goals of Global Britain.

A model that is more resilient in the face of conflict and crisis

The current conflict in Ukraine reminds us that for many tens of millions of people around the world, the chance to travel, work or learn abroad is not always possible, and a crisis means it can be suddenly taken away. Accessing opportunities to work or study abroad currently depends on having SELT provision open and operating in their own country. For those in places like Syria, Afghanistan and most recently Ukraine, traditional language testing provision is inaccessible.

Combine this with the experience of the pandemic, which saw sustained closures of large numbers of SELT centres around the world, and the conclusion is unavoidable: physical test centres alone do not provide a resilient testing infrastructure to support the UK's international education policy objectives.

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18 (2022) Home Office | Immigration Statistics year ending December 2021 | Migration statistics - GOV.UK (www.gov.uk)

19 (2022) Home Office | Guidance | New immigration system: what you need to know - GOV.UK (www.gov.uk)

20 (2022) Home Office | Guidance | Prove your English language abilities with a secure English language test (SELT) - GOV.UK (www.gov.uk)

Digital innovation to attract and secure global talent

This report argues that as the world recovers from COVID-19 and important migration trends return, a shift to digital innovation for secure English language testing can help the UK build a resilient migration system that can maximise talent and reach new markets, and in doing so, enhance the UK's status as an 'science and technology superpower'.[21] As the UK seeks to attract global talent to support its economic future, the appeal of its HE sector and the efficiency of its visa processes will be key.

> "The language testing model should be actively supporting the country's goals to seek out and attract talent... in practice, however, a test centre model throws up significant hurdles."

Drawing on new opinion research conducted by Public First in China and India (November 2021)[22], the findings in this report indicate the need for a new digital model of language testing that maintains high security standards and test validity, while enhancing the resilience of the SELT system and maximizing the accessibility of these tests so the UK can reach more international talent. To remain competitive, the UK must put in place the systems and processes for attracting and securing international talent — wherever these individuals may live and whatever their background.

> "Delivering secure language testing via exams invigilated in test centres has now become a barrier to talent and a brake on the policy goals of Global Britain."

21 (2021) Council for Science & Technology | The UK as a science and technology superpower - GOV.UK (www.gov.uk)

22 Full poll tables are available at www.publicfirst.co.uk

> "The pandemic has been a wake up call of an overreliance on China in particular, and India, to many universities. We need to avoid overreliance on one or two big markets."

John Brewer, formerly CEO, Northern Consortium UK (NCUK)

THE UK'S GLOBAL APPEAL

THE UK'S GLOBAL APPEAL

Young people in India and China surveyed for this project were clear: the UK remains one of the most attractive places to work and study. The UK's education offer is regarded as one of the best in the world and proficiency in English is important for test takers' future careers and life goals. These attitudes reflect the UK's strong global appeal and help explain the high demand for visas from applicants in these markets in recent years, spurred on by economic development in Africa, South America and Asia, and an expanding middle class globally.

'Global Britain' and the quest for talent

The UK has a disproportionate share of the world's top ranked universities and its broader education sector is internationally renowned. Education exports are a valuable industry for the UK, and overseas students have supported the expansion of UK universities and the teaching and research investments they continue to make. According to research by the Higher Education Policy Institute, the 2018/19 cohort of 272,920 international students delivered a net economic benefit of £25.9 billion to the UK.[23]

The UK has always been an attractive destination for international students and workers, with a world-class education sector, diverse cultural life and a dynamic market economy that is supportive of entrepreneurs. The rise of English as the dominant language in the global economy has cemented this soft power advantage for the UK[24] and has made a British education even more prized. International students made up 20% of all HE students in the UK in 2018/19 and 22% in 2020/21. At the postgraduate level (taught and research posts), at all institutions, 64% of enrolments that year were international students (EU and Non-EU).[25]

In 2019, a 'whole-of-government' international education strategy[26] was launched with a goal to have 600,000 overseas students a year by 2030 — a goal that is likely to be consistently exceeded well in advance of that date. After leaving the EU, the UK has adopted a suite of policies to reorientate the country's economic and foreign policy agendas to support the country in expanding its international footprint and strengthening trade and investment links in new overseas markets. The policies supporting this 'Global Britain' agenda are designed to foster trade and export opportunities — including in the growth sector of HE and transnational education provision — but also lower barriers to those wanting to invest in or bring their talents to the UK.

> "I don't think 600,000 was an extraordinarily ambitious target."
>
> Elizabeth Shepherd, Managing Director of Consultancy Division, Times Higher Education

23 (2021) Higher Education Policy Institute | The costs and benefits of international higher education students to the UK economy | Summary-Report.pdf (hepi.ac.uk)

24 (2013) British Council |The English Effect | https://www.britishcouncil.org/sites/default/files/english-effect-report-v2.pdf

25 (2022) Higher Education Statistics Agency | Where do HE students come from? | HESA

26 (2019) Department for Education | International Education Strategy - global potential, global growth (publishing.service.gov.uk)

Migration policy changes have made the UK more appealing

A range of government policies are designed to sell the UK as a destination for study and skilled work, and to ease the migration pathways, including via the creation of a new Office for Talent.[27] A new graduate route and Global Talent Visa have been launched.[28] Visa rules have been adapted to allow people to stay in the UK after graduation for up to two years (or three years for PhD courses) and to switch in-country between study and work visas. These changes have increased the appeal of work and study in the UK, and reduced barriers for those who want to stay in the UK longer. Extending the post-study visa period has made the UK offer more attractive to international students, especially those from India. Growing international student recruitment remains a cross-government goal for the UK, and after a decade or more of dependence on Chinese students, the HE sector itself is working to diversify its offering to appeal to a wider base of markets across Africa, Asia and the Middle East. According to Sir Steve Smith, the UK's first International Education Champion, countries such as India, Indonesia, Saudi Arabia, Vietnam and Nigeria are priority growth markets for the UK's education sector.[29] In an update to the national strategy in 2021, the UK government reaffirmed its commitment to the goals of the strategy. This includes increasing the value of education exports to £35 billion per year and funding of £110 million for the new Turing Grant Scheme for overseas study for up to 35,000 students, starting this current academic year, with the expectation that a similar number of international students will receive grants to study in the UK.[30]

Strong demand for migration to the UK

COVID-19 caused unprecedented declines in international mobility and these exceptional circumstances also exposed the UK's HE sector's financial dependence on international students and the volatility this created. Interviewees for this report shared the view that the pandemic had forced many universities to re-evaluate the business models that had depended too much on international student fee income rising every year.

However, the impact of the pandemic over the last two years should be seen against a longer-term trend which has seen the UK successfully market itself as a top destination for inward migration. The UK has experienced high levels of net migration through regulated routes for more than two decades.

The majority of those arriving do so on one or more visa categories as students or skilled or priority/seasonal workers. Before the pandemic, the total number of international students applying for visas for study in the UK had risen almost every year for a decade, with significant increases since 2015 in student applicants from China and India. The table shows the level of inward migration demand[31] for the UK (defined by work and study visa applicants, and excluding their dependents) from China and India over the last six years and the top five nationalities for inward migration:

27 (2020) Department for Business, Energy & Industrial Strategy | News Release | Government fires up R&D across the country to cement the UK as science superpower - GOV.UK (www.gov.uk)

28 (2021) Home Office | News Release | Graduate route to open to international students on 1 July 2021 - GOV.UK (www.gov.uk)

29 (2021) Department for Education | EducationHub Blog | How the International Education Strategy is championing the UK education sector overseas - The Education Hub (blog.gov.uk)

30 (2021) Department for Education | International Education Strategy 2021 (publishing.service.gov.uk)

31 Based on annual volume of primary applicants for UK visas (excluding extensions) for any type of visa in the study or work categories (see Methodology)

Beyond the EU, two markets dominate the supply of migrants to the UK

	2016	2017	2018	2019	2020	2021
China	97,589	114,180	132,860	159,309	82,727	120,346
India	57,275	56,217	61,991	80,470	67,259	119,722

The trends are clear: Chinese visa applications increased by over half in just four years to 159,000 in 2019. The first year of the pandemic saw volume reductions across the board, with a significant decline in Chinese applicants: down to 83,000 applicants from China in 2020. By last year that had recovered to 120,000 applicants from China.[32]

Demand from India has also become a major feature of the UK's immigration picture in recent years. Indian demand for visas was less than half that of China in 2018, but reached 80,000 pre-pandemic before falling to 67,000 in the first pandemic year, and then jumping to 120,000 in 2021. Applications from other countries like the United States have fallen in absolute terms, and China has fallen as a share of all non-EU visa applicants. Total work and study visa applicants from China now make up 23% of all non-EU applicants, compared to 28% in 2018. And total applicants from India now make up almost a quarter (23%), when in 2018 they comprised just 13%.

Nigeria has also shown remarkable growth, with total applicants of 34,000 in 2021, up from 10,000 three years ago. As a proportion of all non-EU applicants in those visa categories, Nigeria has increased from 2% in 2018 to almost 7% in 2021.

	2021
China	120,346
India	119,722
Nigeria	33,597
United States	21,629
Ukraine	21,426

"The geographic choices of students have become much more diverse. Many more Indian students are now considering regional options within Asia - Malaysia and Singapore - and within India itself."

Jim McLaughlin, Assistant Vice President, Community Development & Partnerships, IC3 Movement)

32 (2022) Home Office | Immigration Statistics year ending December 2021 | Migration statistics - GOV.UK (www.gov.uk)

Migration demand has already returned to the pre-pandemic trend, with India now on course to outpace China

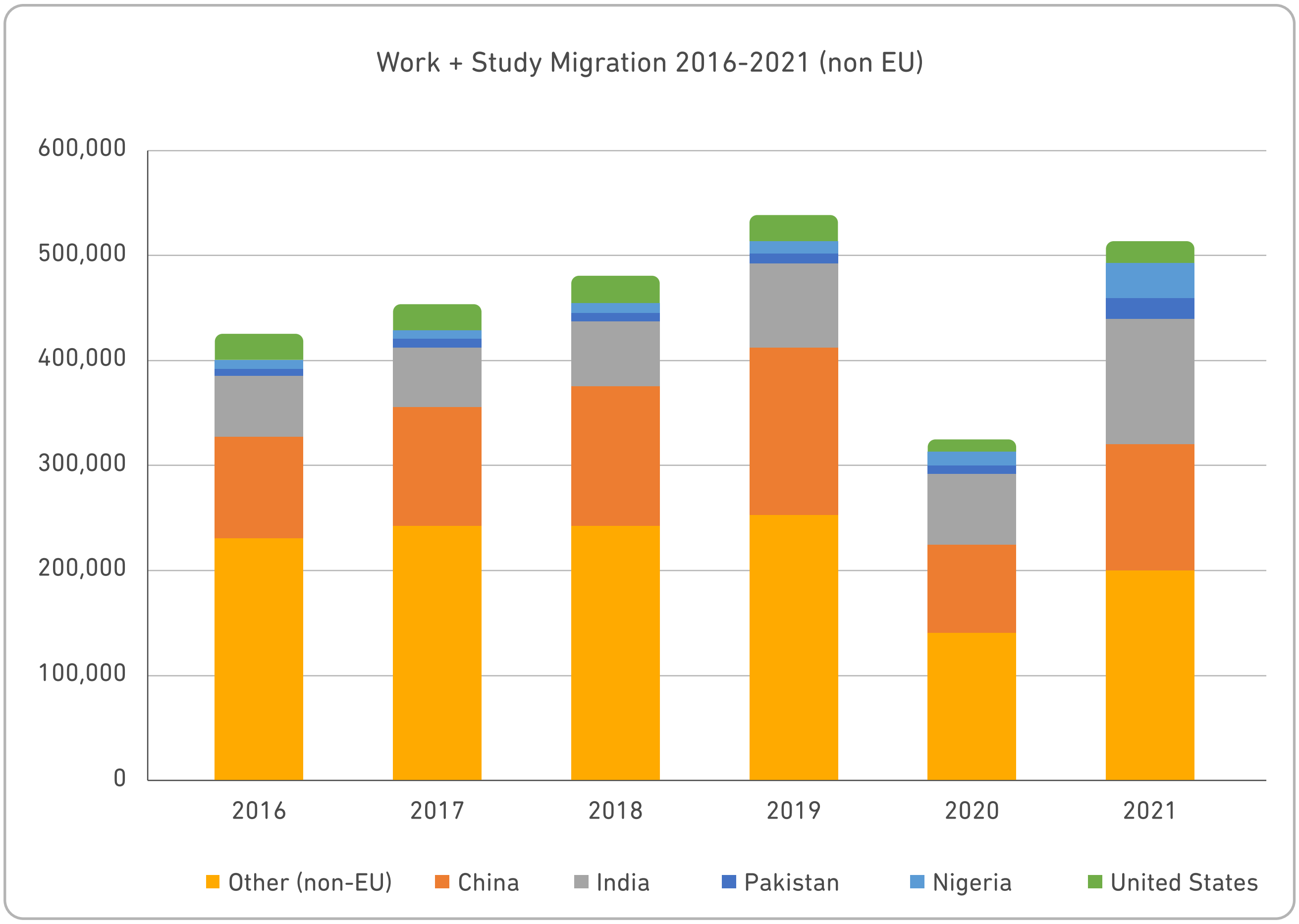

Chart 1: Home Office statistics, 2022

Despite the pandemic and a steep fall in visa applications in 2020, the number of students enrolling in UK courses increased in 2020/21. Latest data shows 605,130 non-UK student enrolments, which meets the 2030 target and is an increase of 9% over 2019/20 – with 75% of these enrolments from outside the EU (even though not all of these students will be studying in the UK). This also suggests that the underlying pre-pandemic trends for rising student numbers are being maintained, even if fewer of those students actually made it to UK campuses to pursue their education.

The extraordinary growth of the last few years may not be sustained and the pandemic impact could be confounding the broader trends. However, if the average rate of growth from the last five years in HE enrolments by all non-UK nationals continues, we estimate that there will be somewhere between 875,000 and 1 million international students by 2029/30.

What might growth in student demand look like out to 2030?

Many factors influence the annual migration trends and the number of work and study visas applied for. In the last two years, additional volatility has been caused by the pandemic, with an exceptional decline in volume in 2020. Other geopolitical events can also have an impact – sometimes in unexpected ways. Looking to the future, even if rates fluctuate across countries, the strong appeal of study at UK institutions remains high and should continue to see increases in international student numbers for the rest of this decade – far beyond the 600,000 target adopted by the government in the 2019 strategy. The future demand for higher education among international students can be estimated by taking a five-year average growth rate from 2016/17 to 2020/21. Including both EU and non-EU international first year HE enrolments, and projecting forward based on these average growth rates, the UK can expect to see demand rise by 70% to over 1 million international students by 2029/30. Even taking a more conservative projection using the lower average growth rate of the last 15 years leads to an estimated total of 875,000 international student enrolments by the end of the decade – or a 45% rise from 2020/21. Both scenarios assume no further liberalisation of the UK's visa rules. This degree of expansion will have significant implications for the HE sector in terms of course provision, university capacity and fee income, and such a scenario warrants further detailed modelling and planning by sponsors and immigration authorities to prepare for such a trend.

Sources: HESA data on HE enrolments in UK institutions by domicile. Available at www.hesa.ac.uk

Changing preferences around study overseas and favoured destinations

Mobility across the global education market was disrupted by the pandemic and the travel restrictions that most countries imposed. For students making plans about where and when to pursue international education, markets like Australia became unviable. In the wake of this, interviews for this project indicate other important changes underway in terms of study destinations of choice.

A number of education providers highlighted how top choices for destination countries are also changing. Agents surveyed by Navitas in 2021 found that Canada was on the rise as a favoured destination.[33] Others interviewed for this project observed that some Asian students are staying closer to home (for example, more Indian students going to Malaysia/Singapore).

The demand to study abroad may also be shifting because of attitudes to remote learning. More students are expected to look at a mix of home/international study (for example, spending one year abroad).

> "You also have new frontiers, new destinations. Ireland is one of them."
>
> **Mark Ashwill**, Co-Founder & Managing Director, Capstone Vietnam

33 (2021) Navitas Insights | UK and Canada compete for top spot in the pandemic recovery race – Navitas Insights

In polling for this report, Indian respondents continued to show a high level of interest in studying abroad, with a majority saying the COVID-19 pandemic had either made no difference to this desire or had even made them more eager to study abroad. Chinese respondents were more likely to say that the pandemic made them less interested in studying abroad.

Pandemic experience has not deterred Indian students from pursuing study opportunities abroad

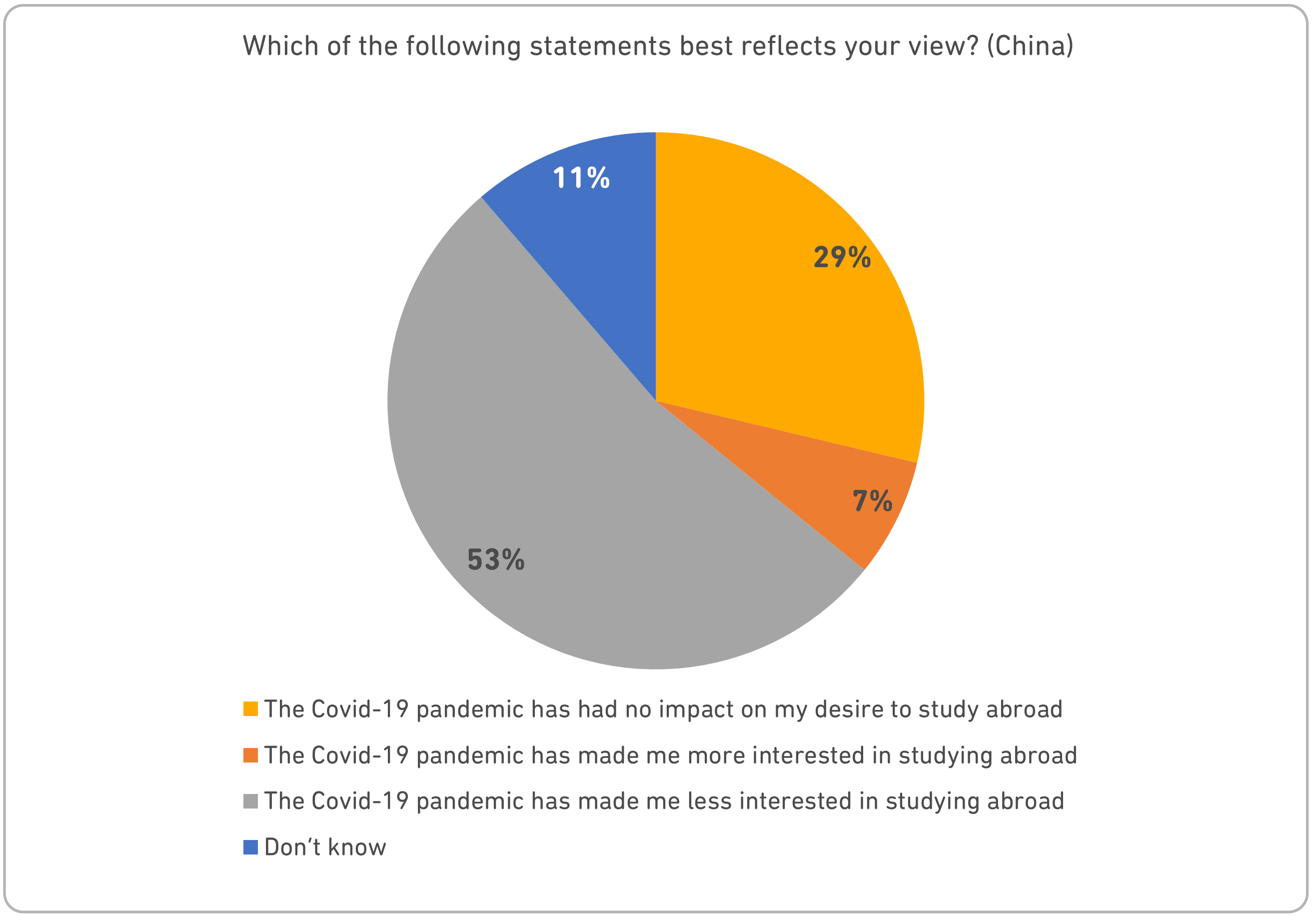

Chart 2: Public First polling

Those respondents who said they were considering studying abroad showed a clear intention to do so in the next one or two years, suggesting a robust pipeline of future applicants. In fact, 28% of survey respondents in China said they were considering studying for a degree in a foreign country and as many as 46% of Indian respondents. Of these, Indian respondents said they were most sure of doing so, with 29% saying they were "certain they would move abroad to study".

Attitudes to international education

As expressed by Indian and Chinese poll respondents, both the US and the UK were deemed to have the highest quality university education of overseas markets. The UK's appeal is strong among those respondents who said they were considering studying abroad, exceeding countries like France or Canada, and second only to the USA.

UK education competes at the highest level

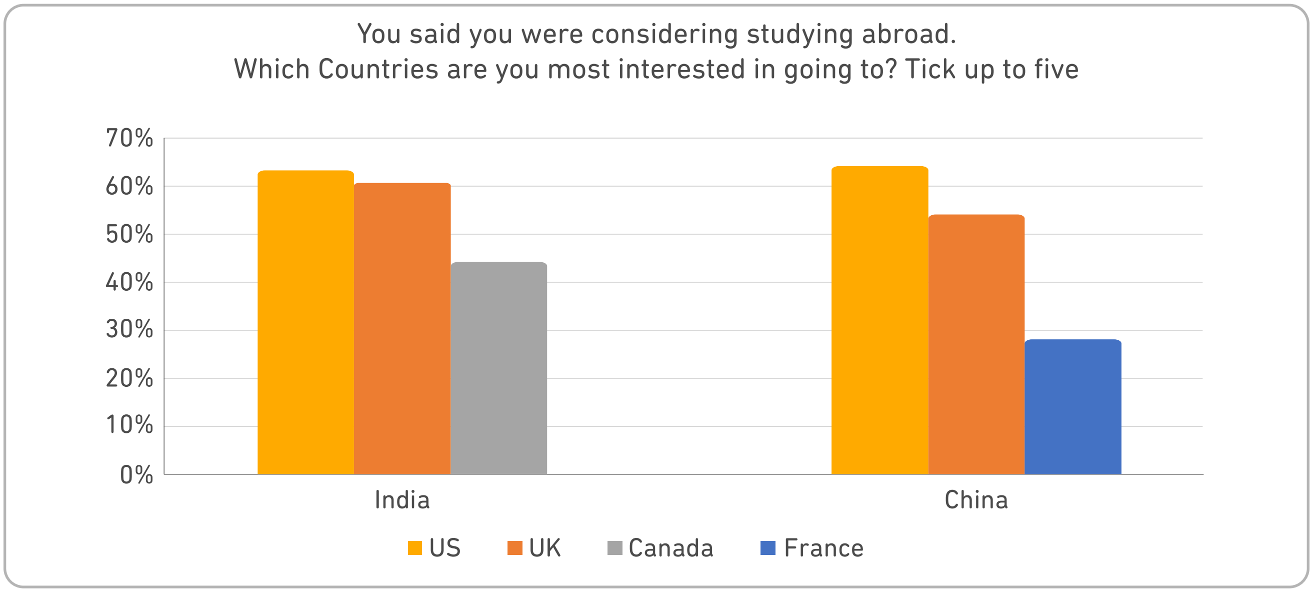

Chart 3: Public First polling

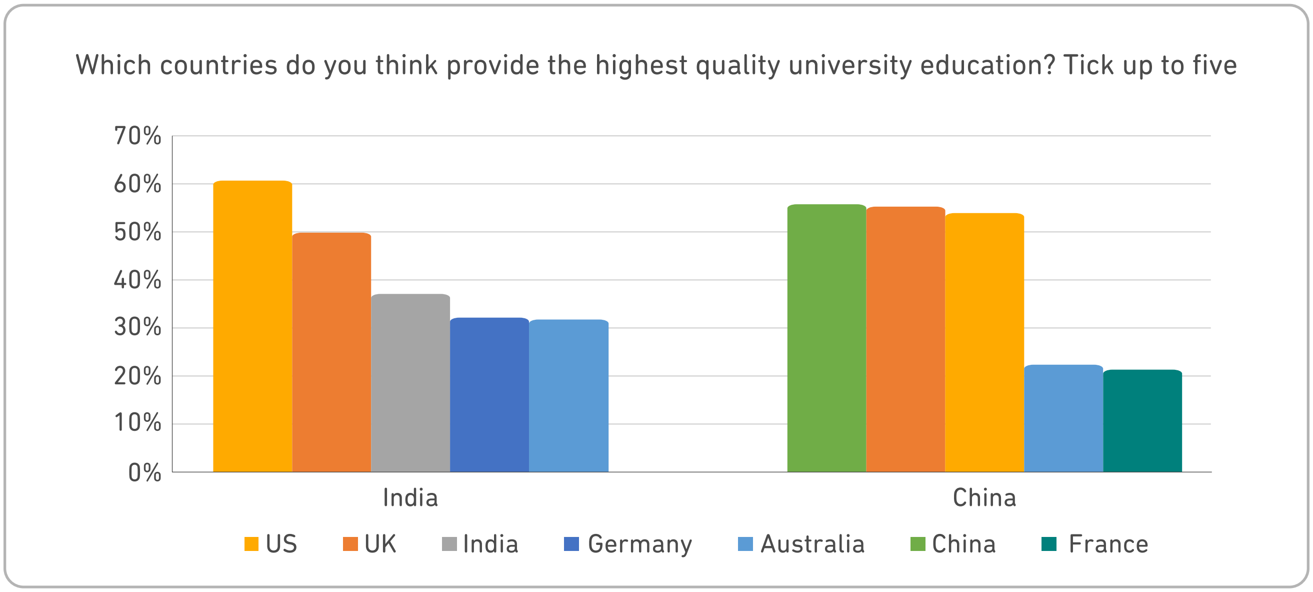

Chart 4: Public First polling

Against the backdrop of the pandemic, demand for UK HE courses continue to rise. This appeal is there even among people who may not have the means or the intention of pursuing it as a life choice. This means that while the UK can afford to be selective, it would also do well to grow the HE sector even further, admitting many more international students from major markets like India, and also newer markets like Nigeria, than it has done in the past.

The untapped potential of the UK's university sector

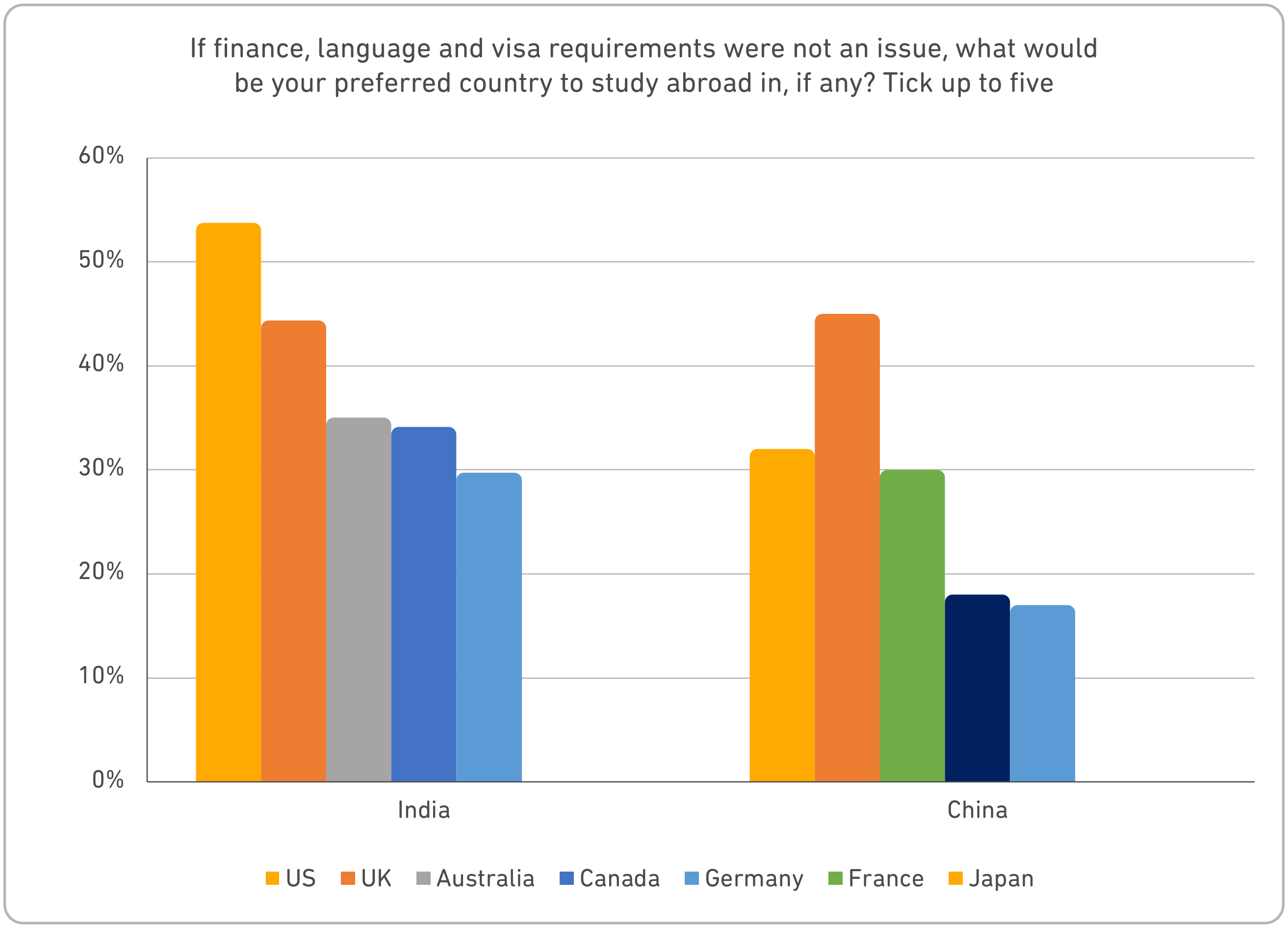

Chart 5: Public First polling

The strong appeal of the UK hinges on a migration system that seeks to tap into the reservoir of talent which aspires to pursue professional and educational opportunities in the UK. However, as we will see in the following section, the way visa language testing requirements operate currently presents very significant challenges to many applicants aspiring to move to the UK.

"There will always be a demand for overseas students to come to study in other countries. I don't think that will disappear, even if we do have the ability for students to study a UK degree in their home country. The benefit of a student studying overseas is the holistic experience they get. I think students and their families will still see an overseas education as being very worthwhile and valuable. It may be that they do the first one or two years of their degree in-country, but there will always be an overseas element to it."

John Brewer, formerly CEO, Northern Consortium UK (NCUK)

TODAY'S LANGUAGE TESTING LANDSCAPE

TODAY'S LANGUAGE TESTING LANDSCAPE

One factor that underpins the UK's attractiveness as an education destination is the ease with which talented applicants obtain permission to study in the UK and qualify for visas. Any friction in the migration process – be it speed, cost or bureaucracy – whether by design or not, can serve to discourage talented applicants who would otherwise consider the UK.

In common with many countries, the UK has designed an immigration system that requires applicants to qualify according to set skills criteria, including English language abilities. The emphasis on skills and the importance of proven language proficiency are not in question, nor is there any doubt that the UK wants to leverage its educational status to attract global talent. What is less clear is whether the current migration system's reliance on secure English language testing (SELT) being delivered largely through physical test centres is able to support this aspiration today, or meet rising global demand in future.

Current barriers to talent

Proficiency in English language is a necessity for international students pursuing study in the UK, and proficiency tests must be valid and secure. Equally important, talented applicants need affordable and convenient ways to demonstrate their abilities and qualify for visas. With the exception of a short list of English-speaking countries, and those student applicants who can demonstrate implied language proficiency via their prior educational qualifications, all visa applicants must prove that they can meet the required standard of language proficiency before a visa can be issued.

Originally introduced in 2010, the UK operates a model for language requirements involving proficiency examinations outsourced to 1,056 physical SELT testing centres[34] (as of February 2022), predominantly in middle and low-income countries. As this section will explore, for many applicants, this model is inflexible, expensive and restricts access, narrowing the UK's talent pipeline.

> **"If there is not an approved test location in your country, you will have to travel to another country to take the test."**
>
> Official GOV.UK guidance on SELT for applicants (2022)

34 (2022) Home Office | Prove your English language abilities with a secure English language test (SELT)- GOV.UK (www.gov.uk)

SECURE ENGLISH LANGUAGE TESTS

Those seeking to apply for a visa to migrate to the UK from most countries need to prove their English language proficiency by booking a secure English language test (SELT) offered by one of the four approved Home Office suppliers or by meeting a similar standard set by HE providers. For non-exempt students and many other work or entrepreneur visas, these tests assess reading, writing, speaking and listening abilities. These costs are paid by the applicant and without a valid SELT test score reference, visa applications cannot be considered. SELT test results are not mandatory for all visas, and less stringent requirements exist for family visa classes. Universities are approved sponsor institutions and assess language skills on all applications, but the Home Office does mandate SELT tests for work and study visas from the majority of countries or for applicants who are not exempt because they already have recognised educational qualifications at the appropriate degree level. Applicants from a small exempt list of countries where English is the main language, such as the USA or Jamaica, are not required to sit a SELT in order to make a UK visa application.[35] All test takers can choose where and when to sit their exam, but not all language testing centres offer SELT exams, and not all countries have test facilities approved by the Home Office. The results of any SELT exam are not valid if they were obtained more than two years before the application.[36]

There are structural barriers inherent in a physical test centre model that can discourage talented applicants. These barriers include geography, availability, cost and the speed of the process. While each factor on its own might be a modest deterrent, taken together they can discourage some applicants entirely.

Geographic coverage

Visa applicants who are not applying for student visas must take an English proficiency exam at a SELT test centre. SELT test centre coverage is not available in every country, and some entire regions, like Africa and South America, are not well served. The Home Office maintains a list of current test providers and official guidance states: "If there is not an approved test location in your country, you will have to travel to another country to take the test".[37] There are 82 countries around the world with no SELT provision at all and these comprise over 480 million people. In addition, over a dozen of these are larger countries — like Mali, Angola, Guatemala and Niger — with populations over 15 million people, have no approved SELT test centres.[38] Applicants in these countries need to travel internationally to access the UK's visa testing process, at times requiring another visa to do so. It is therefore not surprising that together, these 82 countries yielded just 3,998 primary visa applicants for work or study in the UK in 2021, or less than 1% of the total.[39]

35 (2022) Home Office | Immigration Rules Appendix English Language - Immigration Rules - Guidance - GOV.UK (www.gov.uk)

36 (2022) Home Office | Prove your English language abilities with a secure English language test (SELT) - GOV.UK (www.gov.uk)

37 (2022) Home Office | Prove your English language abilities with a secure English language test (SELT) - GOV.UK (www.gov.uk)

38 Based on 2022 World Bank country data and official SELT provision (Feb 2022) available online at https://www.gov.uk/guidance/prove-your-english-language-abilities-with-a-secure-english-language-test-selt#find-an-approved-test

39 (2022) Home Office | Immigration Statistics year ending December 2021 | Migration statistics - GOV.UK (www.gov.uk)

The coverage offered by the SELT network caters for applicants based on historic visa demand, but that demand has changed over time and in 2022 there is a very high level of disparity of access determined by location. Total visa applicants per country divided by test centres (currently operating) in those countries shows the variation in the demand each centre services:

Wide disparity in access to SELT test centres

Country	2021 Migrant (work + study) total applications per test centre
Nigeria	2,240
India	1,640
China	1,168
Pakistan	554
Kenya	538
Indonesia	399
South Africa	345
Mexico	230
Brazil	218
Vietnam	141

"It is therefore not surprising that together, these 82 countries [without any test centres] yielded just 3,998 primary visa applicants for work or study in the UK in 2021, or less than 1% of the total."

There are also overseas markets with large populations that are also underserved:

Some test centres serve in excess of 18 million people

Country	Open Test Centres Feb 2022	People per centre
Sudan	2	43.8m
Ethiopia	3	38.3m
Indonesia	8	34.2m
Iran	3	28.0m
Brazil	9	23.6m
Mexico	6	21.5m
India	73	18.9m

Even in major markets like India and China – which comprise a majority of non-EU international students to the UK, and for whom test centre provision is measured in scores of locations – there are significant barriers to access.

There are 153 SELT test centres in China, of which 103 are currently open, meaning that two years into the pandemic, a third of SELT centres in China are still closed. This has impacted visa applications to the UK in 2021. The centres that are open are concentrated in the cities of China. The World Bank estimates that 61% of China's population is urban, or around 860 million people. This means that there is only an estimated one open testing centre for every 8.35 million people in a city, and that around 550 million people would have to travel into an urban area in order to visit a testing centre in the first place.

There are 73 SELT centres in India, all of which are concentrated in cities. The World Bank estimates that 35% of India's population is urban, or around 480 million people. Not only does this mean that there is only an estimated one open testing centre for every 6.6 million people in a city, but that around 900 million people would have to travel into urban areas in order to visit a testing centre. For many, this would require travelling significant distances.

Our polling also shows that a large minority (31% in India and 18% in China) would only be willing to travel up to 25km to visit a SELT test centre, even though test centre provision makes this impossible for many applicants. Only one in four young people in India, and one in three in China, said the test would justify a very long journey of 100km or more. For most, this would be too far: a majority (59% of Indian and 51% of Chinese respondents) would not be prepared to travel more than 100km to take a standardised English test.

Sources: SELT providers; and World Bank data

Discouraged by distance to a SELT centre

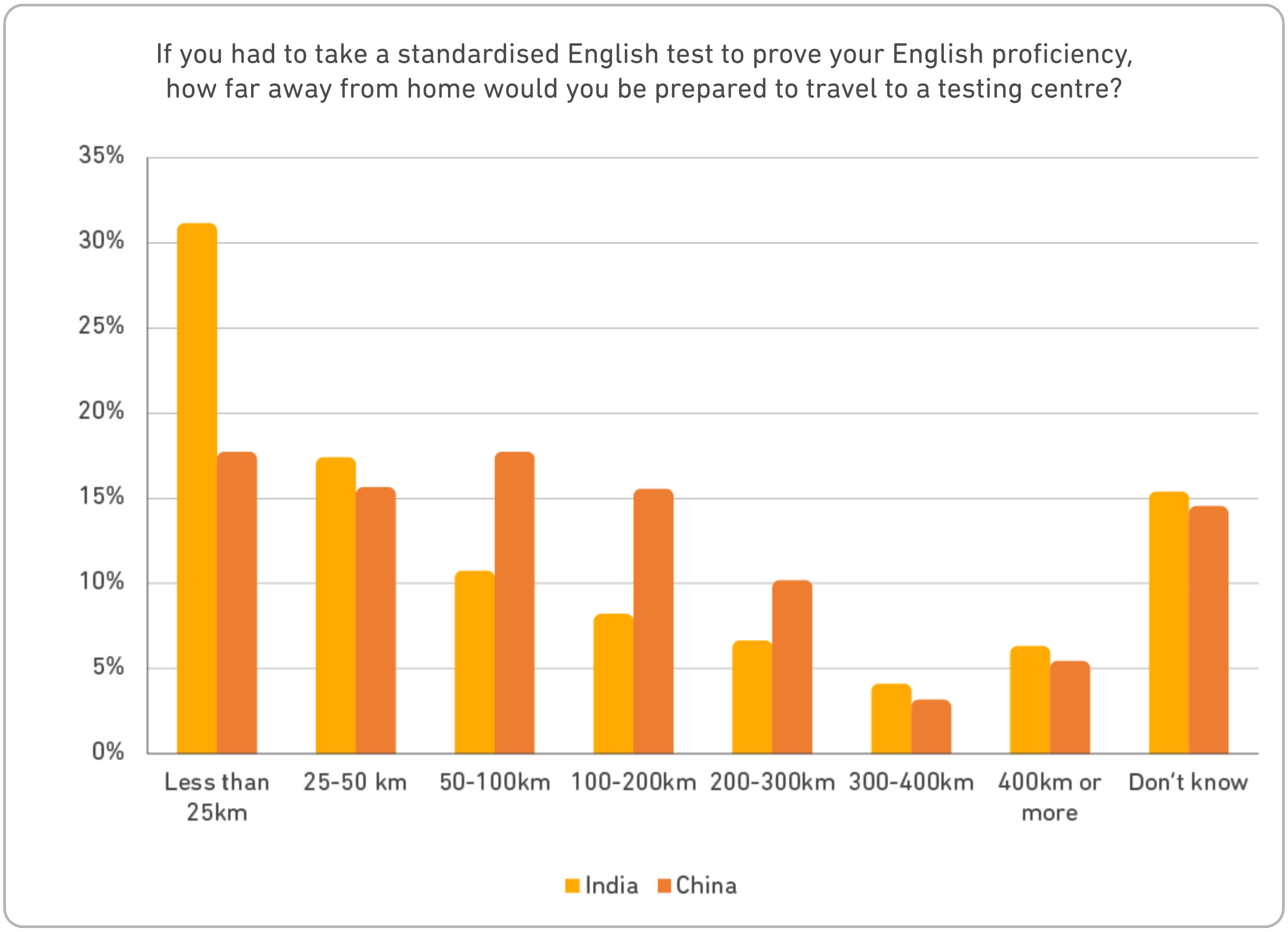

Chart 6: Public First polling

When asked what would deter them from taking such a test, respondents cited time taken to go that distance, cost of transport, lack of access via public transport, and their other family or work commitments.

> **"Universities are realising that in some countries and situations you need to have the technology for distance learning and assessment at the user/student end, as well as the university/deliverer end — and there will be a responsibility to help with access."**
>
> **John Brewer**, formerly CEO, Northern Consortium UK (NCUK)

Cost and distance of travel to a test centre would deter people

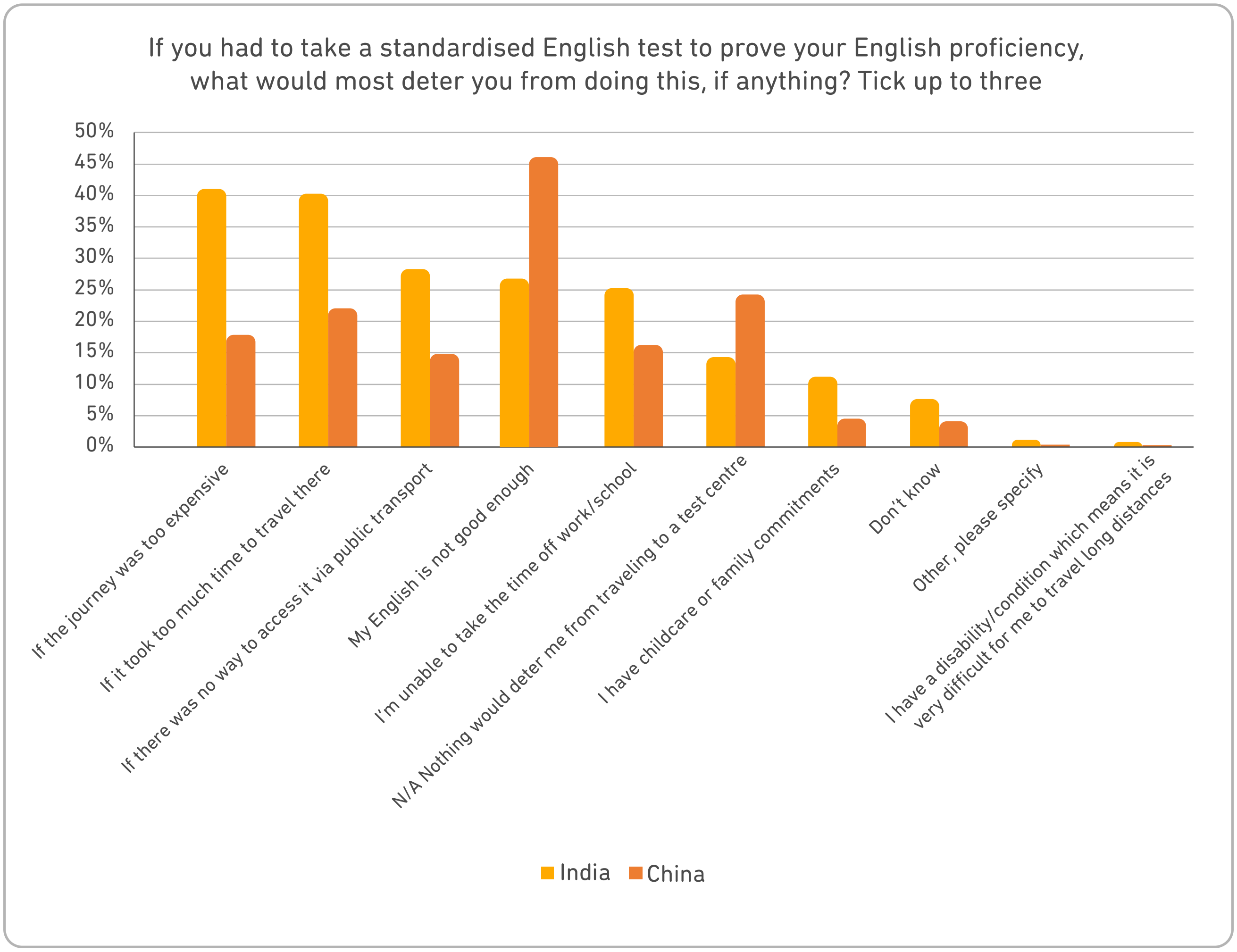

Chart 7: Public First polling

Test cost

The costs of tests can also be a barrier. Existing test providers charge different rates in each market, but in 2021 applicants could expect to pay more than £100 for an in-person test. This is a cost that in some markets makes the test itself prohibitive. For example, on average a student in Pakistan must pay over two months' median family income to take a standardised English test through one of the main existing suppliers. For other key markets with fast growing economies and where the UK is encouraging more international students, like Nigeria, Kenya and Vietnam, the price barrier is still significant.

Months of net national income per person required to purchase a test

	IELTS Cost (Months)	TOEFL Cost (Months)	PTE Academic Cost (Months)
Pakistan	2.13	2.01	2.16
India	1.29	1.24	1.29
China	0.49	0.47	0.42
Nigeria	1.21	1.22	1.22
South Africa	0.75	0.60	0.52
Mexico	0.33	0.31	0.31
Brazil	0.34	0.34	0.31
Vietnam	1.15	1.10	0.99
Indonesia	0.76	0.75	0.71
Kenya	1.67	1.80	1.76

Respondents to our polling showed that the cost of the exam was the biggest disincentive, followed by distance to the test centre and the stress of attending a test centre itself.

Sources: SELT providers; and World Bank data

Cost of the English test is the biggest factor discouraging Indian respondents

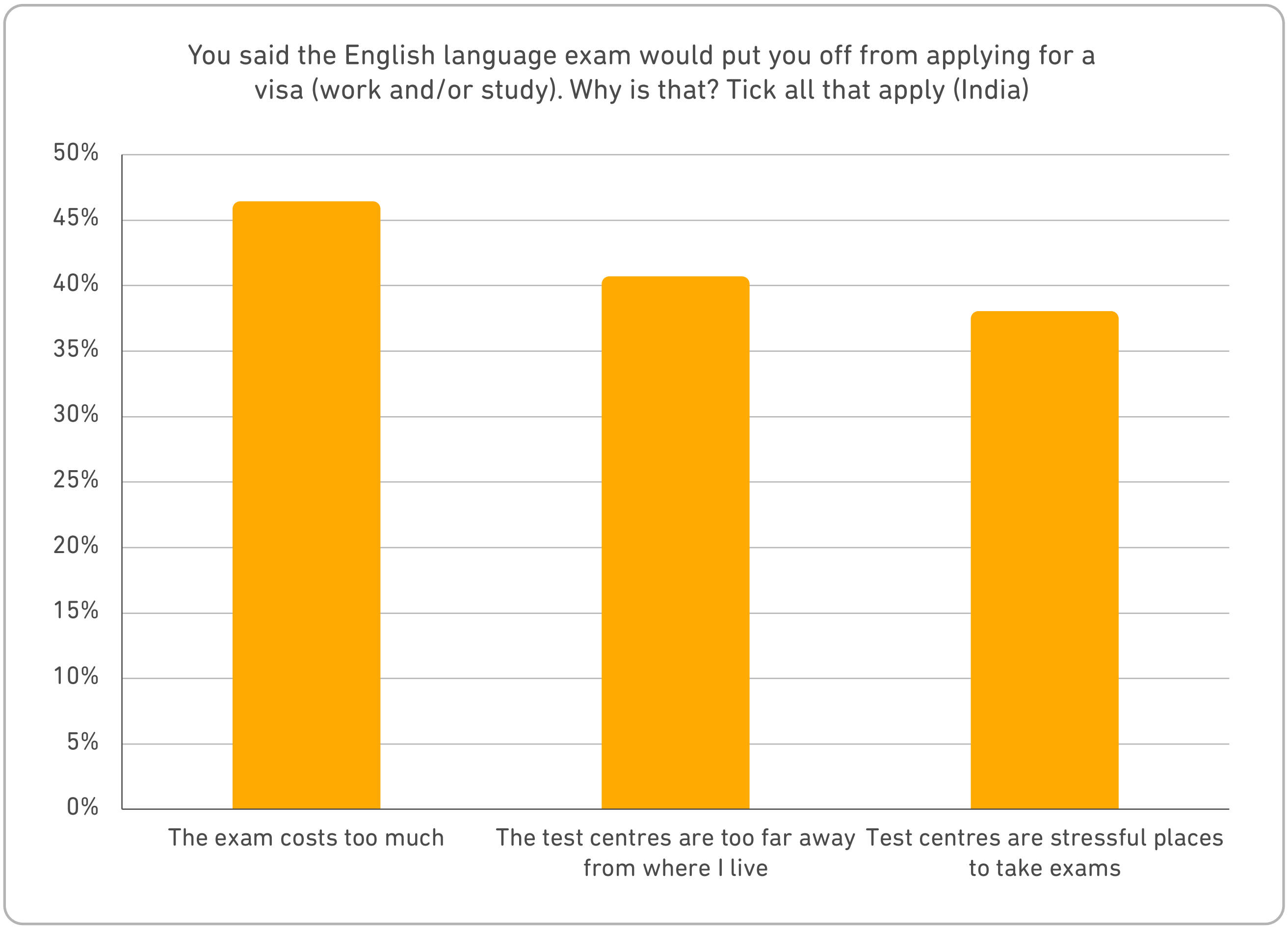

Chart 8: Public First polling

Convenience

Access and cost are not the only barriers. Finding a convenient appointment is not guaranteed, because SELT test centre availability cannot always match fluctuating demand across the year. The exam experience is another disincentive, with the length of the test proving to be a negative factor.

Under the current model, all prospective test takers must book an available appointment at a future date. Depending on the country and the test site, there are not always available appointments and applicants must either choose to travel to another test centre or wait for the next available appointment at their closest centre, which can be weeks or even months in the future.

Test centres are now reopening but in China one third of centres remain closed

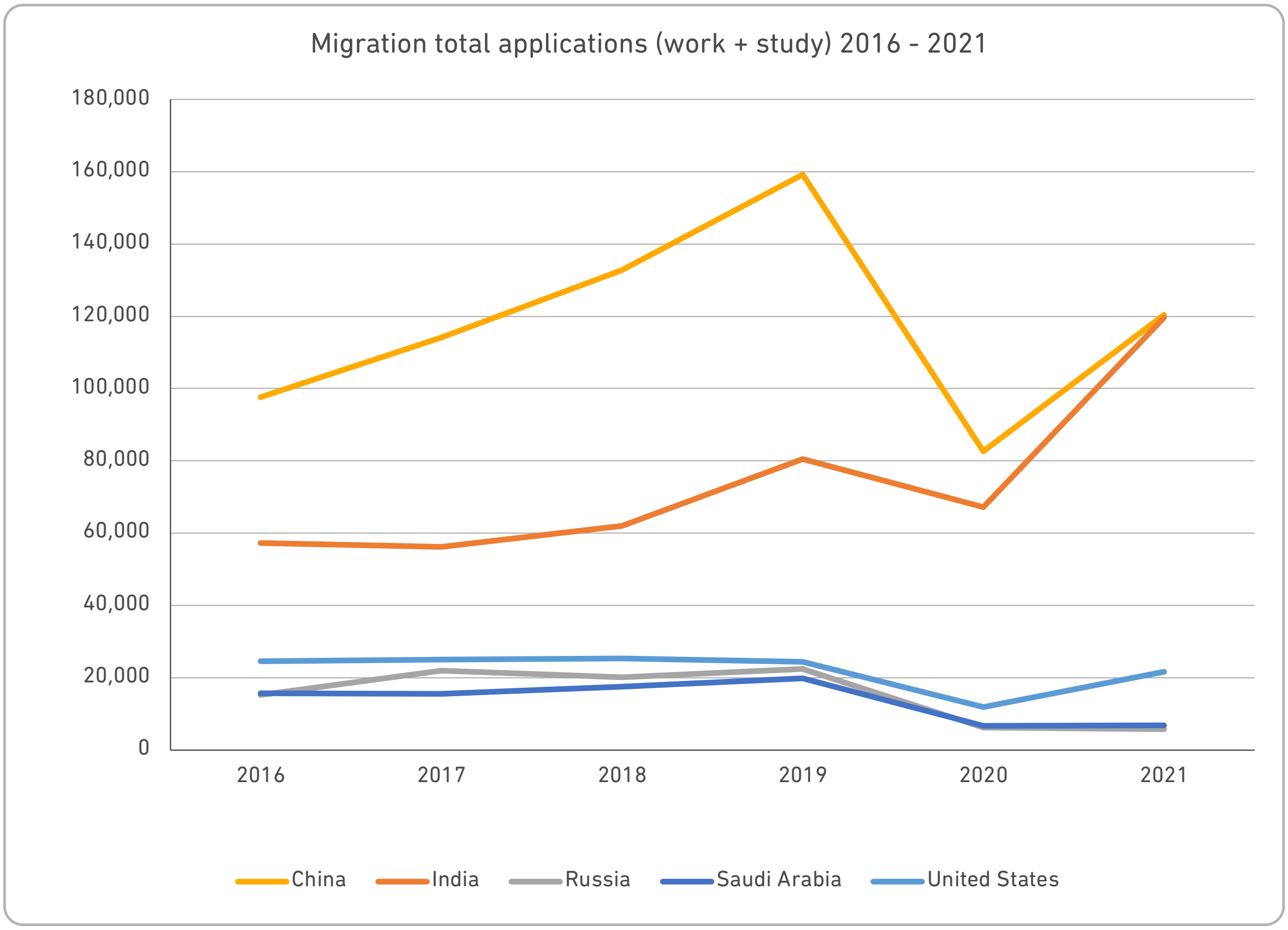

Chart 9: SELT providers

Over the course of 2020-21, the impact of COVID-19 on test centre availability was unequal, with some markets like Russia and China seeing sustained closures, persisting into spring 2022, compared to India which kept more centres open and is already back to full availability at all sites.

The current model of test centres results in fundamentally unequal access to English testing opportunities. This is further exacerbated to the extreme by public health emergencies, natural disasters, or civil unrest and armed conflict erupting in places that leads to sudden closures of test centres is a weakness of the current model. Visa applicants, sponsors and the immigration authorities would all benefit from a SELT model that is flexible and more resilient.

"A world where innovative technologies allow education to happen remotely, and where distanced learning is increasingly accepted and even encouraged, is one that could also support greater access to education among disadvantaged populations."

A DIGITAL FUTURE

A DIGITAL FUTURE

> The impact of COVID-19 and the disruption it caused to traditional teaching and business models is still being felt. In education, as in many industries, the pandemic has accelerated trends that were already established and has also led to a changed outlook among users – in this context, students and prospective applicants. Higher education providers in the UK will continue to diversify their offering to meet international demand for a UK education both here in the UK, as well as through remote and offshore delivery modes.

Greater familiarity with online learning and remote working are generational legacies of the lockdowns, but they also hint at a change in the sector's willingness to provide convenient, cost-effective delivery models. For some students, international study will always be attractive because of the campus benefits of learning in a close community and the life experience of living overseas, but for others, different options are now becoming more attractive.

A world where innovative technologies allow education to happen remotely, and where distanced learning is increasingly accepted and even encouraged, is one that could also support greater access to education among disadvantaged populations. Governments and the education sector need to adapt to the post-pandemic world and the changing attitudes to learning of students and young people. Technology can drive service delivery. Digital innovation in language testing has the potential to provide real benefits, both to governments who need to achieve important policy goals and to users who want and expect a more customer-centric model.

The changing nature of international education provision

The UK's HE sector has traditionally prioritised China, but that is now changing. New markets are becoming attractive, with South America and Africa emerging as key 'targets' for recruiters and agents.

Transnational education is also growing, with Higher Education Statistics Agency (HESA) data showing 316,430 students outside the EU registered at a UK HE institution in 2020/21, up from 253,595 in 2016/17.[40] For the UK's education market, transnational education will continue to be a vital revenue model for certain institutions, but it is not replacing international study. Many of the education industry experts interviewed for this report believed it caters to a different type of student.

Nonetheless, admission for courses delivered overseas by UK institutions still require robust language testing provision, and as this sector grows, so will the demand for digital tools.

The pandemic has increased awareness and use of online and remote teaching and learning. Survey respondents, especially young people in India, say they feel much more positively about online learning now than they did before the pandemic.

40 (2022) Higher Education Statistics Agency | Where do HE students come from? | HESA

Attitudes to online learning since the pandemic

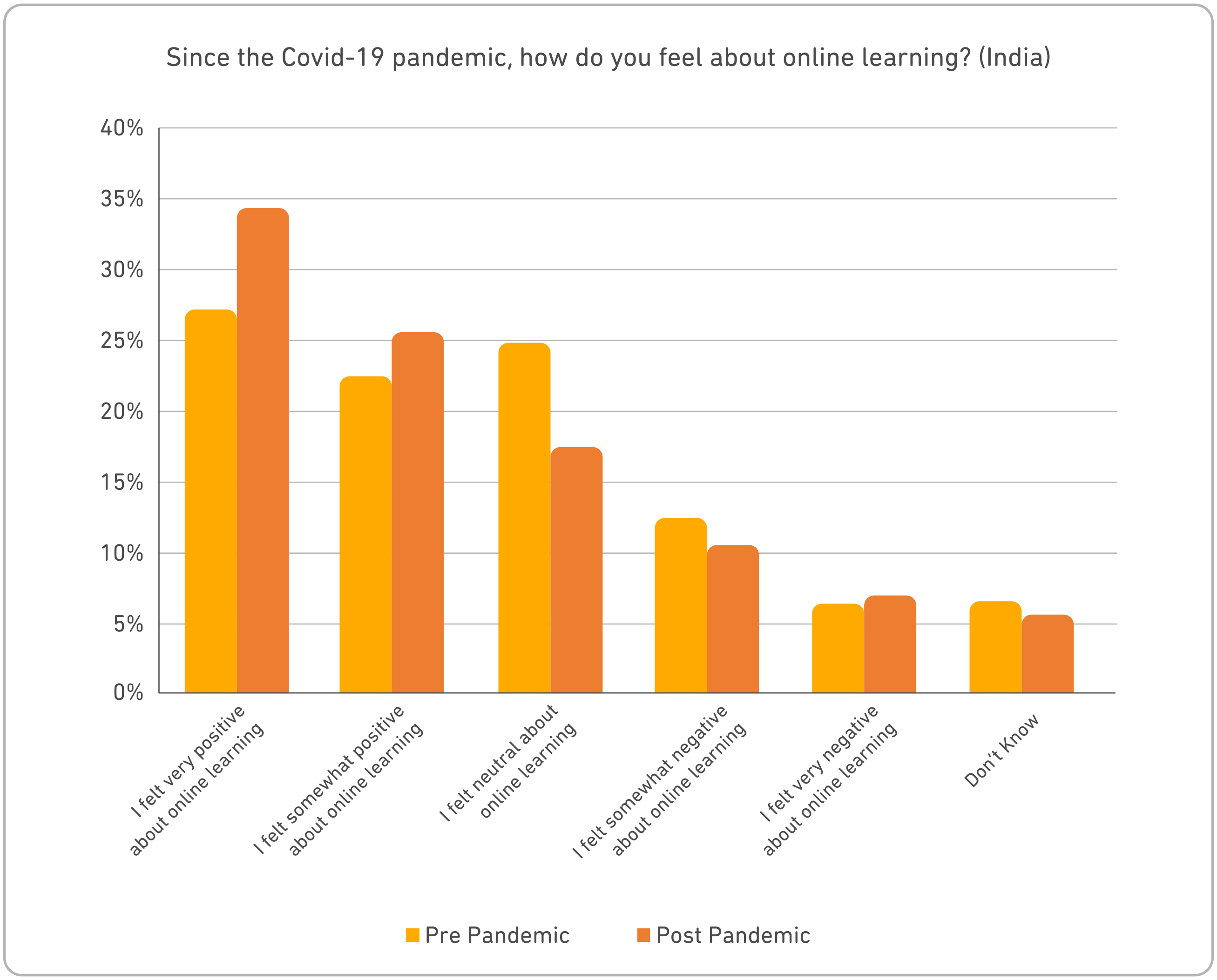

Chart 10: Public First polling

However, interviewees for this project were not persuaded that more familiarity with remote learning would result in fully online approaches. Hybrid education models were seen as more likely because the holistic, face-to-face experience is still important.

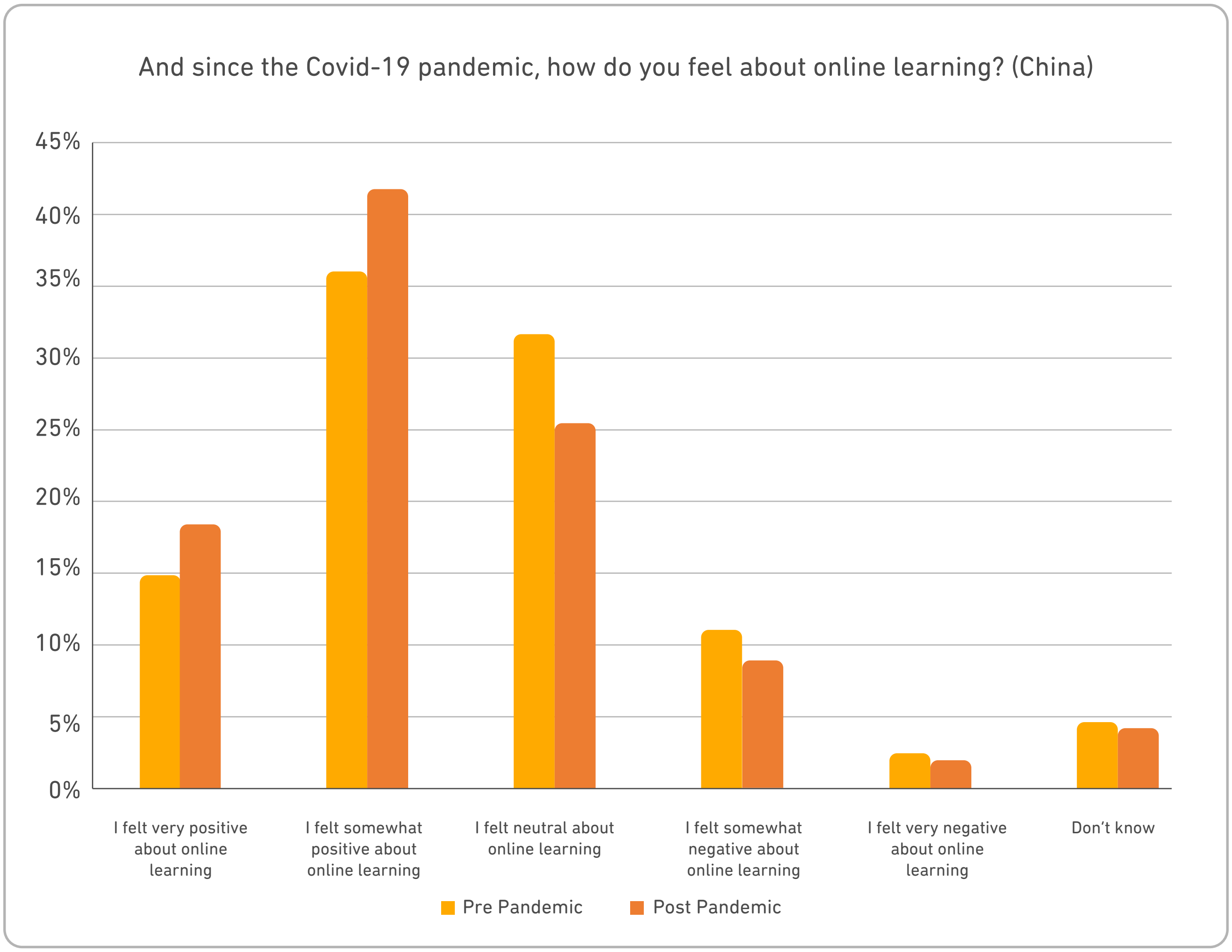

Chart 11: Public First polling

The longer-term impacts on educational preferences of COVID-19 are not yet clear. The pandemic may have permanently diminished the appeal of international study for some people, with concerns over safety, travel restrictions and distance from family. The polling for this project showed that in China, studying a foreign degree delivered at a university in China is now preferred over studying for a degree abroad.

> "Hybrid is the operative word – versus 100% online instruction. There is still a lot of interest and a strong preference for face-to-face interaction and classroom instruction."
>
> **Mark Ashwill**, Co-Founder & Managing Director, Capstone Vietnam

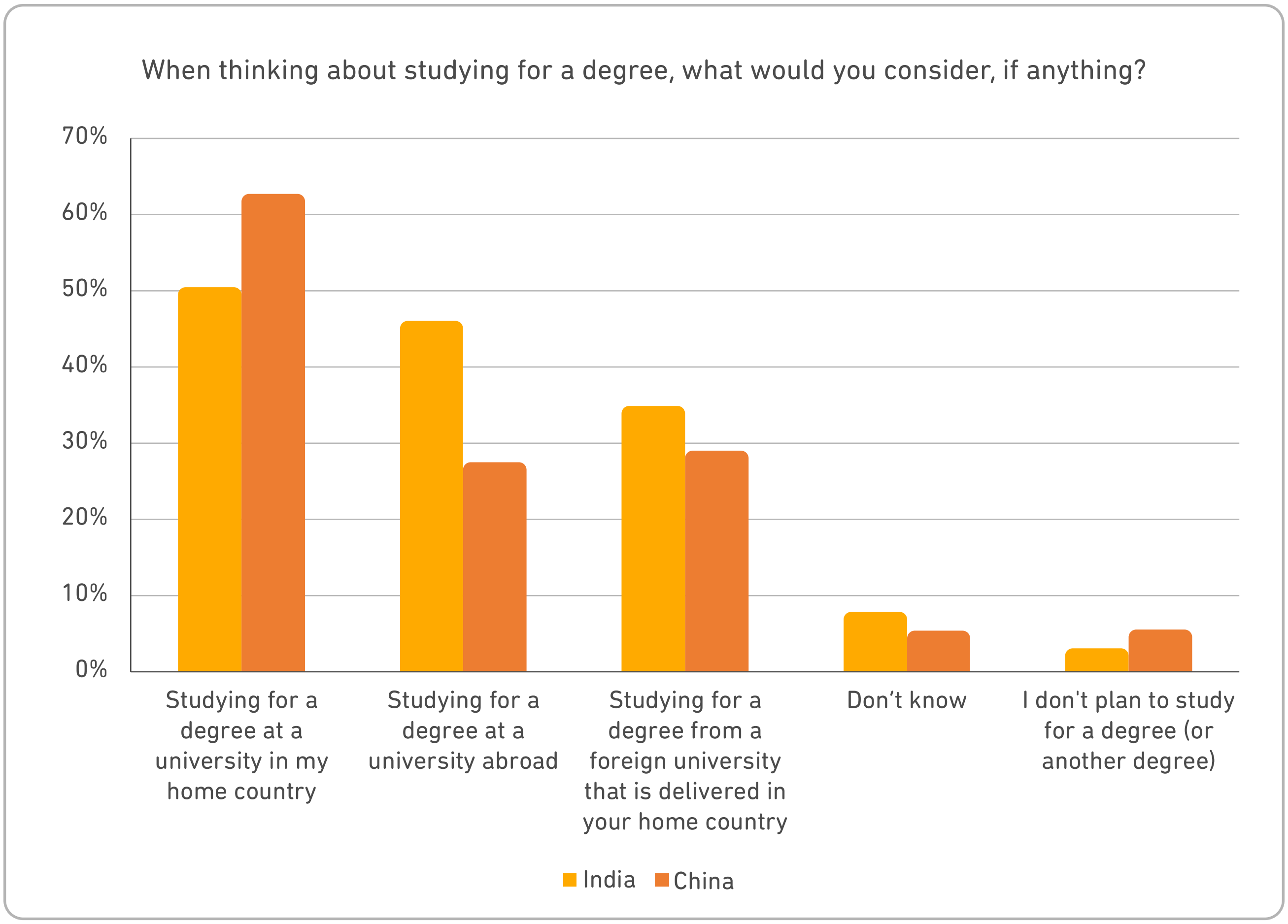

Chart 12: Public First polling

Digital models that increase access

Digital tools for online testing like the Duolingo English Test require users to have access to an internet-enabled desktop computer. During interviews for this project, there were concerns that internet coverage and average speeds were not yet sufficient everywhere to make the expansion of online models uncomplicated, especially in more rural areas. However, internet coverage and average speeds continue to expand across the world. As these trends continue, more of the world's population will gain access to reliable internet connectivity and be able to benefit in terms of education and job opportunities. Average costs for internet access in developing markets are still far from affordable for everyone, however monthly broadband costs in major markets including India, China, Vietnam and Brazil, are all $25 or less.[41]

41 (2020) Cable | Global broadband pricing league table 2022 | https://www.cable.co.uk/broadband/pricing/worldwide-comparison/

Benefits of digital innovation to users

The process to apply for and gain a visa for study or work is fundamentally a customer journey where the requirements on the applicant should be as clear and uncomplicated as possible. This means accessing secure language tests should also be designed in a way that enhances the convenience of the process and provides real benefits to users. There would be multiple benefits to users of shifting to a model that offered digital SELT testing.

> **"Respondents showed a strong preference for at-home tests."**

In our India and China polling, we found a strong preference for taking a standardised English test at home or another location, rather than a test centre, with Indian respondents significantly more likely to say they did not want to go to a test centre. Just 14% of young people polled in India said they would prefer to sit a test at a test centre.

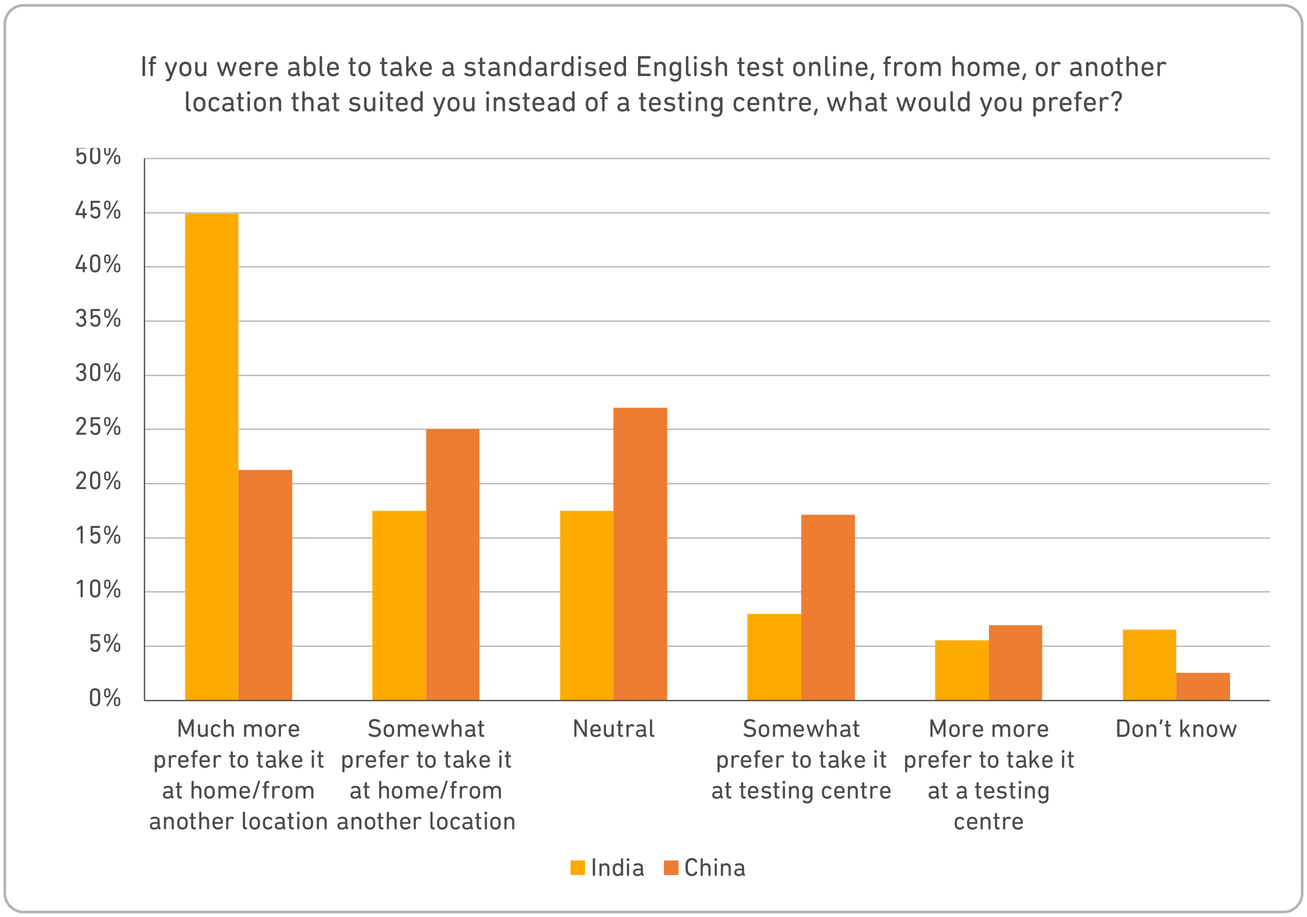

Chart 13: Public First polling

Digital innovation to permit at-home tests would lower many key barriers to accessing SELT, especially for talented individuals living in certain countries or regions, or for whom the time and distances involved in attending a physical test centre are prohibitive. Shorter, adaptive tests taking around one hour can also be fairer on all abilities of test-takers.

The user groups most likely to benefit would be future visa applicants living in underserved regions as well as those with more limited transport options or for whom physical disability makes long journeys impractical. Given the extremely low level of SELT provision across Africa, applicants from this region would benefit greatly from a digital at-home option.

Shifting from a physical test centre model also expands user convenience. Test takers do not need to compete for a finite number of available testing slots near to where they reside. An on-demand model enables language tests to be taken at a time of someone's choosing, at home or at work, rather than waiting days, weeks or months to book an available slot at their nearest SELT test centre.

Furthermore, compared to traditional SELT provider tests, digital offerings are cheaper, reducing a key barrier to access for lower-income applicants. For example, the Duolingo English Test costs $49 (£36), substantially less than any of the existing providers. The cost of a UK visa application excludes the cost of the SELT test, which is a mandatory requirement; therefore, cheaper tests would reduce the overall cost of migration for individual applicants.

Benefits of digital innovation to government

Traditional test-centre processes are being superseded by digital innovation across public services. In recent years the UK has invested in the modernisation of many border processes, and the government has pledged to build the 'most effective border in the world' in its 2025 Border Strategy.[42] Many of these changes will involve a shift to digitisation, with the emphasis on making the process efficient and accessible to the user, whether that is a traveller, trader, or migrant relocating to the UK for study or work.

The target operating model for this transformation relies on digitisation and the creation of efficient, secure electronic visa processes, with paper visas being replaced by e-visas that serve as a digital status record.

Necessary to implementing these plans will be integrating a modern SELT assessment via an online test into the wider immigration and border infrastructure, and new digital providers would be critical to delivering these efficient and adaptive services.

Especially since the widespread test taker fraud exposed in 2014 around the TOEIC test, the UK government has rightly prioritised test security. The integrity of a test and the reliability of its results are paramount, which is why any SELT model must continue to guarantee high levels of security and robust safeguards against fraud.

One advantage for authorities moving to a digital model include increased scalability and transparency about the test-taking process, and full audit capability for the performance of the system. The digital nature of the process provides this extra layer of reassurance that the tests are being adjudicated properly and the system is being operated fairly and securely.

42 (2020) Her Majesty's Government | 2025 UK Border Strategy | 2025 UK Border Strategy – HM Government, December 2020 (publishing.service.gov.uk)

"...technology now allows for robust, valid and secure digital assessments of language proficiency, and the approach is widely favoured by younger generations who are more comfortable with online learning and digital adoption."

CONCLUSION

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The UK is entering a new era of international engagement where it can leverage its existing strengths — the English language, a strong market economy and a prestigious and high-quality education sector — to appeal to young generations of talented people across the globe. To do that effectively, the UK has already built a compelling migration offer, as evidenced by the rising volumes of applicants seeking visas to study and work in the UK, despite the pandemic and the economic disruptions it has caused. But this alone is not enough. To truly capitalise on the UK's competitive advantage, the government must remove residual barriers to attracting talent and smooth the journey for future cohorts of young people to come to the UK.

Polling for this report shows that this demand is out there and young adults in China and India have a strong appetite to come to the UK to study or work. There is good reason to believe that there are other important markets full of talented individuals that would see the opportunity of migration to the UK in the same way. At present, some of these talented individuals are discouraged from choosing this path because the UK relies on a model of English language assessment that cannot service this demand equitably.

Fortunately, in 2022, technology now allows for robust, valid and secure digital assessments of language proficiency, and the approach is widely favoured by younger generations who are more comfortable with online learning and digital adoption. By shifting to this model — as governments like Ireland already have - the cost, access and other barriers fall away. The onerous obligation for potential applicants in as many as 80 countries around the world to travel internationally to sit a UK-approved SELT exam in a third country would be removed. Not only would a new digital SELT model be more efficient and more resilient, it would also be much fairer to applicants, wherever they lived in the world.

Research for this report supports calls for a new digital model for language testing that maintains high security standards and test validity, while maximising the accessibility of these tests so the UK can reach more of the international talent that is out there. A modern system of secure English language testing based on digital assessments would not only deliver this, it would also remove a much overlooked barrier that stands in the way of the UK achieving its 'Global Britain' ambitions.

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Methodology

Polling

Opinion research for this project was carried out by Public First. Participants were recruited online, and samples were 1,010 respondents aged 16-22 in China, conducted 15 to 22 November 2021, and 902 respondents aged 16-22 in India, over the period 18 to 24 November 2021. Full poll tables are available at www.publicfirst.co.uk. Public First is a member of the British polling council and abides by its rules.

Interviews

Twelve interviews were carried out between 3 November 2021 and 6 January 2022 to provide further insight, evidence and authority to the Global Britain study. They aimed to help understand what is driving global demand for English-medium education at home and abroad, and how well the current international testing apparatus is keeping pace with changing demand, influenced by international study, growth in foreign education providers locally, or moves by governments to make English compulsory as part of economic development plans. The interviewees were selected to provide demand and supply-side perspectives in the UK and abroad (including Vietnam, India and China).

Migration data

Migration flows can be counted in many ways. Official Home Office data on migration by nationality and visa class is published quarterly, and this report uses the latest available data from February 2022 covering applications for the whole of 2021 (and previous calendar years). As a reflection of incoming demand for UK work or study, we used the number of visa applications, derived using the UK government's published data on entry clearance visa applications and outcomes (source: https://www.gov.uk/government/statistical-data-sets/managed-migration-datasets#sponsorship). As this report focuses on migration for education and work where language proficiency is a feature, we did not include travel visa applications. The total numbers were derived by summing the number of main applicants for each Work Visas and Study Visas as visa type groups, including all sub-categories, but excluding any children study visas (i.e. visa applications for those under 18). As we were interested only in the factors that influence a primary applicant to consider studying or working in the UK and navigating the visa and SELT process, we excluded all dependents (spouses and children) from these totals. These numbers are only representative of visa applications, regardless of their outcome. Because these figures are calendar year, not academic year, and because some visa applications will be withdrawn or rejected or never taken up when granted, the Home Office statistics do not align exactly with the HESA statistics on HE enrolment, although the broad trends by country are consistent.

ABOUT US

Duolingo's mission is to develop the best education in the world and make it universally available.

Our flagship app is the leading mobile learning platform globally. With over 500 million downloads, it has organically become the world's most popular way to learn languages.

We launched the Duolingo English Test in 2016 to lower barriers to English-language proficiency assessments. The Duolingo English Test is an innovative and accessible English proficiency assessment for today's international students and institutions. Digital-first and student-first, the test is available online, on demand—all while using subject matter experts, AI and individual human proctors to ensure each session is reliable and secure.

Students can certify their English from their own computer anywhere—no appointments or travelling to test centres needed. Secure results are available within 48 hours and can be shared with an unlimited number of institutions—opening doors for students, and providing institutions access to a diverse pool of candidates. Test takers, representing 210+ countries and territories of origin, have taken the Duolingo English Test because of its radical accessibility.

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