



International Association
of Language Centres

The IALC Research Report 2021

The Impact of COVID-19 on the IALC Student Experience



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INTRODUCTION

The International Association of Language Centres (IALC) is an international not-for-profit association that has been accrediting independent language centres that teach the language of their country since 1983. As well as outstanding teaching standards and service, **IALC** language schools have individual character and a real connection with their local community.

All **IALC** language schools are quality assured and boutique, providing guaranteed professionalism, personal attention and an exceptional learning experience. **IALC** is a StudyTravel Magazine “Superstar” and its member schools are recognised as amongst the very best international language schools in the world.

The **IALC Research Report 2021 – The Impact of COVID-19 on the IALC Student Experience** draws its data, observations, analysis, suggestions and conclusions from research conducted between 17 August 2020 – 9 October 2020 and continues the work developed by **IALC** and market specialists Bonard (previously known as StudentMarketing) in their previous Research Reports on the **IALC** student experience in 2017 – *The Student Perspective on Language Study Abroad: Student Expectations, Experiences and Satisfaction* and 2018 – *The Student Perspective on Language Study Abroad: Perfecting the Student Experience*.

IALC is a global association representing a truly international membership. The stringent measures that governments worldwide were forced to adopt during the peak phase of the first wave of the pandemic, were destined to have a profound effect on members of the Association and the language travel industry in general. Many nations, particularly in Western Europe, relaxed measures during the summer months of 2020, allowing some students to return to in-school, face-to-face learning, although other countries, especially in the southern hemisphere, maintained strict border controls alongside quarantine requirements and restrictions.

The aim of this study is to **evaluate the impact of the pandemic on IALC students and to serve as a resource for all international language schools, study travel agencies and the wider industry.**

Commissioned by the **IALC** Board in May 2020, the report explores the multitude of ways in which the **COVID-19** pandemic has impacted the **IALC** student experience. The 2021 Research Report continues and builds on the earlier analysis of the **IALC** student experience that was instigated by **IALC** in 2017 but now seen through the lens of the **COVID-19** crisis.

Chapter 1: Expanded introduction to the survey, how the data has been collated and a profile of the survey respondents.

Following is an introduction to the survey, how the data has been collated and the profile of students at IALC schools who participated in the research. In total, 1565 student responses were collected from 17 August 2020 – 9 October 2020.

In order to optimise the value of the **IALC Research Report 2021 – The Impact of COVID-19 on the IALC Student Experience**, the survey targeted both **COVID-19 era** and **Pre COVID-19 era** students who have attended IALC schools.

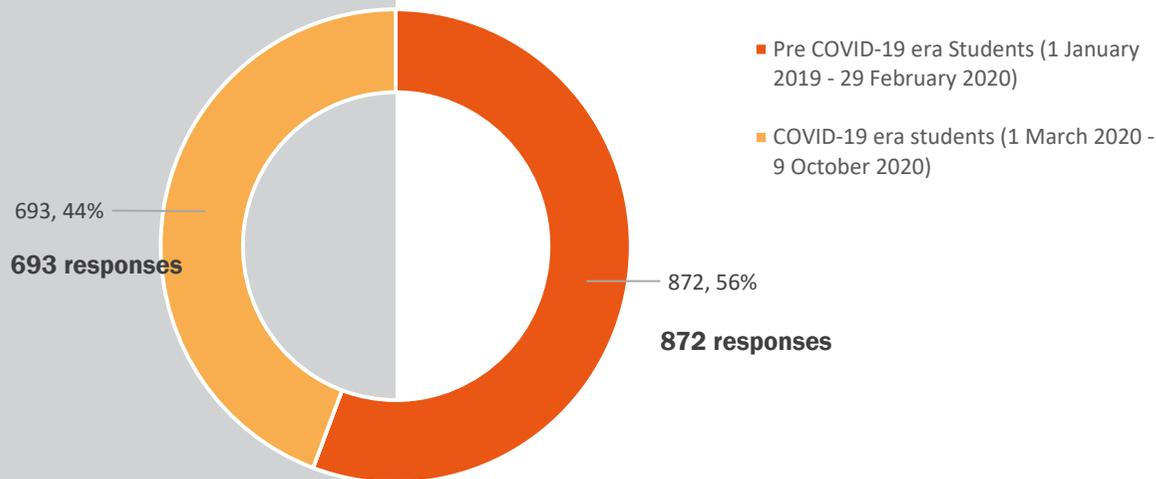
Pre COVID-19 era students can be viewed as members of the ‘pre-pandemic / pre-COVID generation’ as they attended IALC schools from 1 January 2019 - 29 February 2020. All **Pre COVID-19 era** students attended live, face-to-face lessons at IALC schools.

For the purposes of this report, all student respondents who attended IALC schools from 1 March 2020 – 9 October 2020 have been labelled **COVID-19 era** students and should be viewed as members of the ‘pandemic / **COVID-19** student generation’.

COVID-19 students either:

- attended language programmes at IALC schools and then moved online due to the **COVID-19** crisis,
- were recruited as online language students from the beginning,
- attended live or hybrid lessons at IALC schools that re-opened for face-to-face lessons in the period spanning 1 March 2020 – 9 October 2020.

1.1 Student respondent breakdown



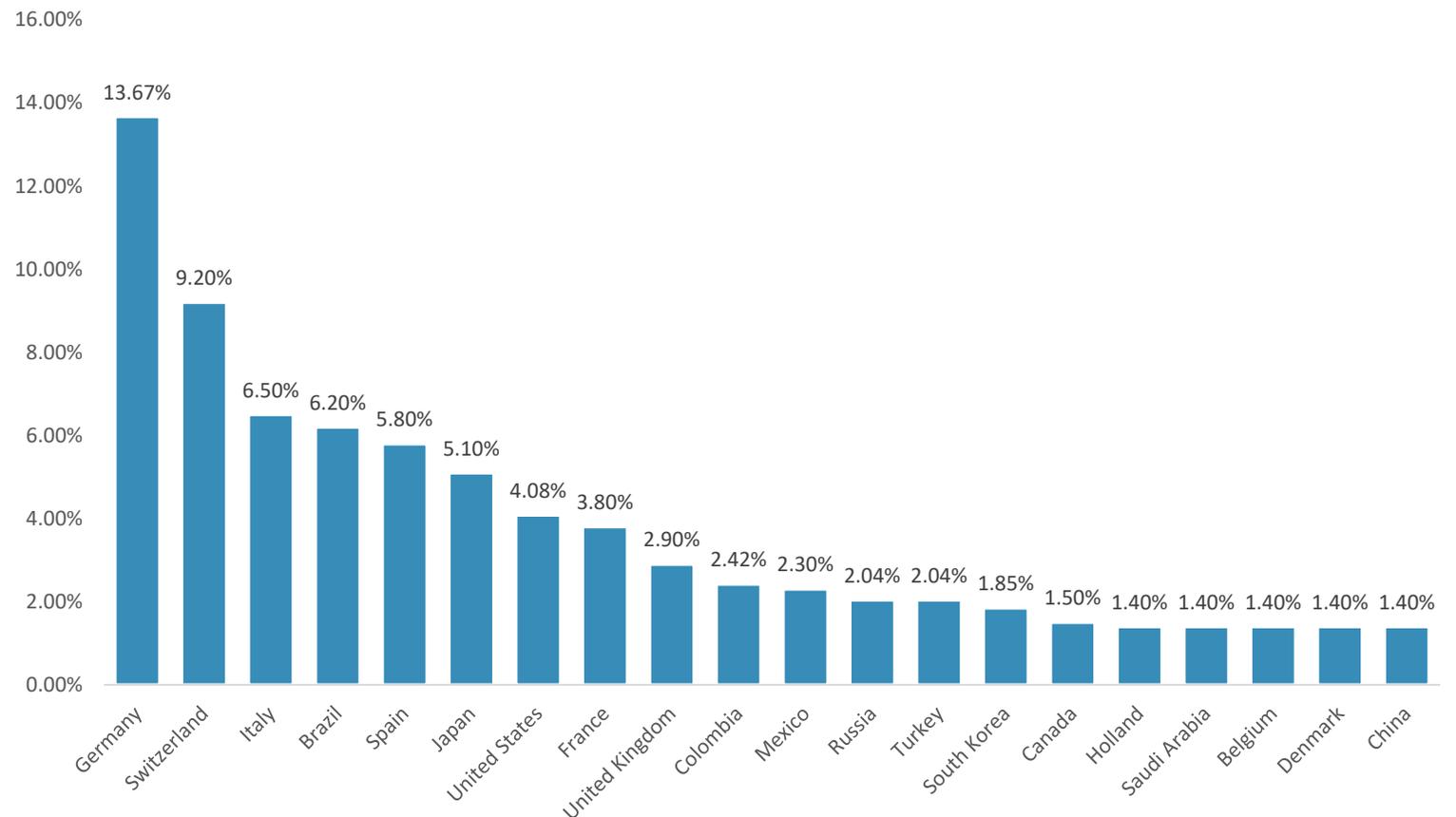
1565 students completed the survey.

1.2 Countries of origin of respondent

In total, 91 separate student nationalities took part in the online survey. The broad range of nationalities involved demonstrates the international blend of students that attend **IALC** schools.

As seen below, in the 'Top 20 countries of respondent origin' the greatest number of individual nationalities that completed the survey came from Germany (13.67%), Switzerland, (9.20%) and Italy (6.50%).

Top 20 countries of respondent origin

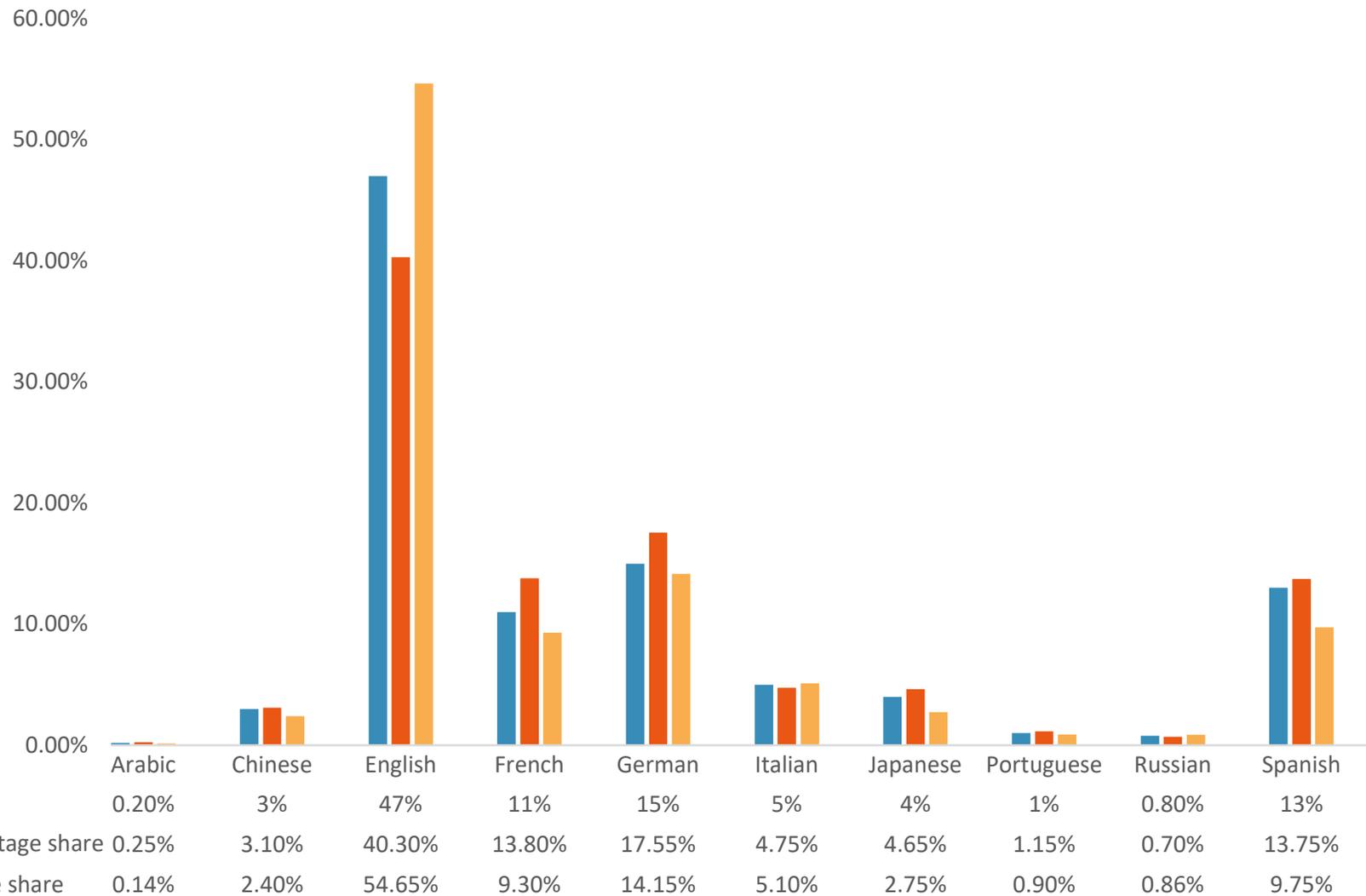


91 separate student nationalities took part in the online survey

1.3 The language breakdown of studied IALC languages

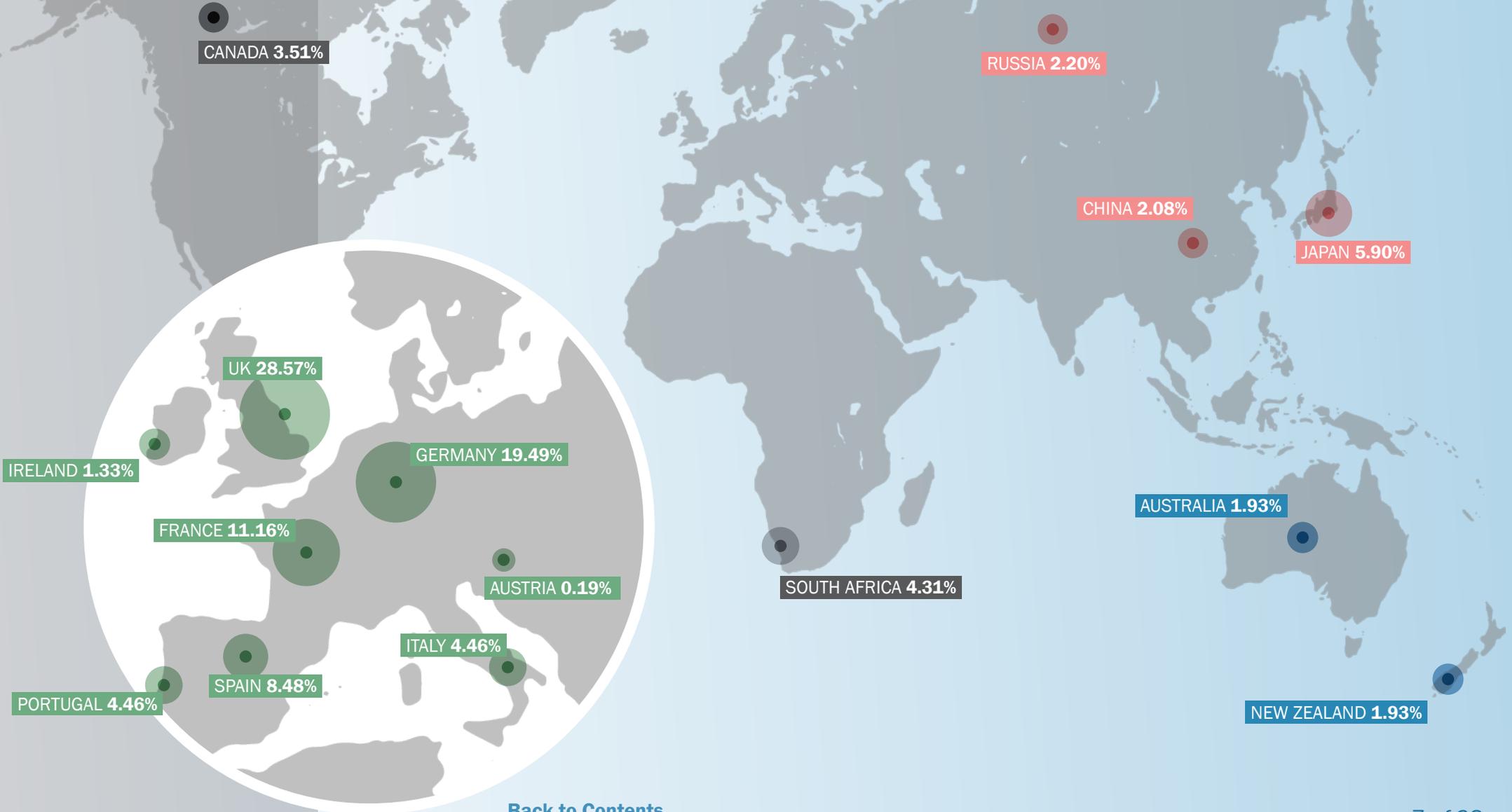
The 2020 survey targeted all 10 languages taught by **IALC** member schools.

Breakdown across 1565 surveyed students



The largest proportion of respondents were learning English (47%), followed by German (15%), and French (11%).

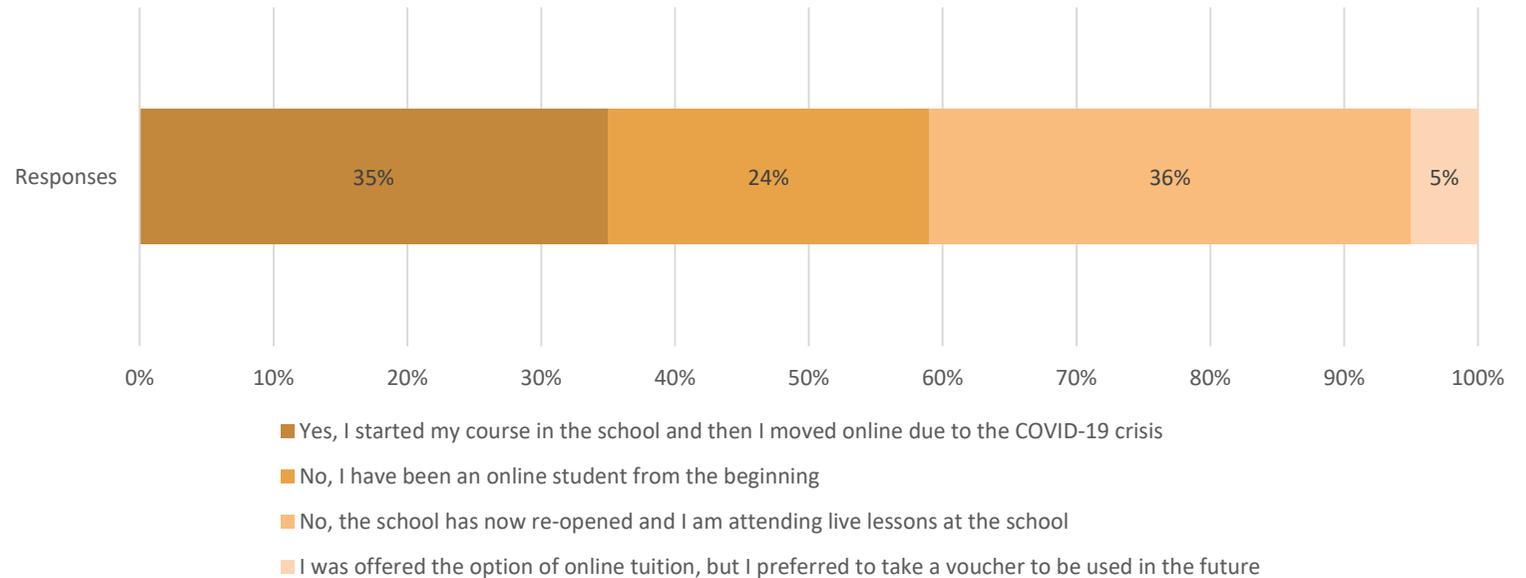
1.4 Respondents by destination of language study



1.5 COVID-19 data segmentation

All 872 **Pre COVID-19** era students attended their chosen IALC school in person, receiving traditional face-to-face tuition. However, for **COVID-19** era students the data can be categorized as follows.

COVID-19 era students: Did you begin your study in the school and then get moved online due to the COVID-19 crisis?

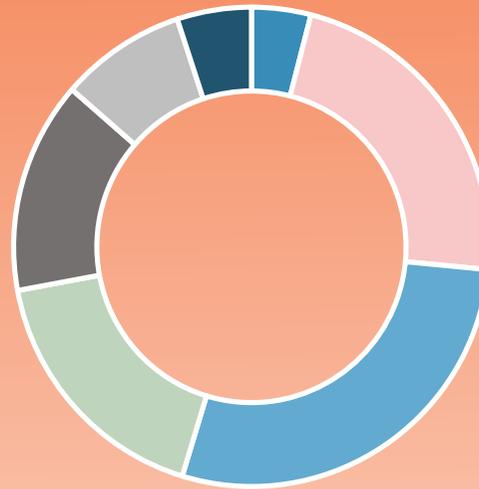


Due to the limitations of the survey, it has not been possible to determine how many students who had originally booked face-to-face language courses subsequently opted for full refunds rather than engage in online study.

1.6 Students' age analysis

A breakdown of the ages of the respondents: separated into **Pre COVID-19** and **COVID-19** eras.

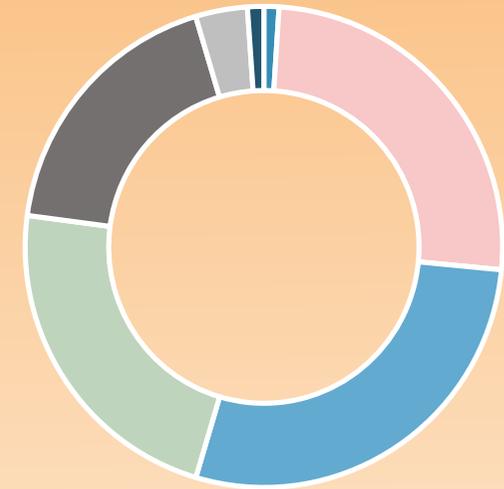
872 Responses
(Pre COVID-19 era)



Under 18:	4.03%
18-24:	22.49%
25-34:	28.18%
35-44:	17.38%
45-54:	14.31%
55-64:	8.56%
65+:	5.05%

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693 Responses
(COVID-19 era)



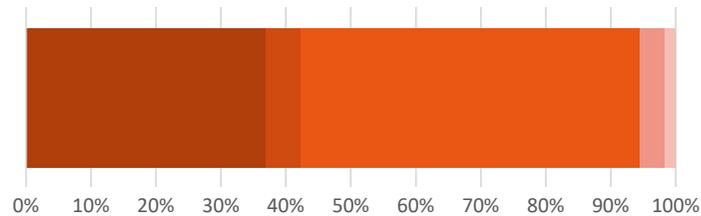
Under 18:	1.02%
18-24:	25.50%
25-34:	28.08%
35-44:	22.49%
45-54:	18.30%
55-64:	3.51%
65+:	1.10%

Chapter 2: Analysis of the differences between **Pre COVID-19** era students and **COVID-19** era students, highlighting the impact of the COVID-19 pandemic on the IALC student experience

This chapter looks at the differences between **Pre COVID-19** era students and **COVID-19** era students and highlights the impact of the **COVID-19** crisis on many facets of the **IALC** student experience.

2.1 Booking channels

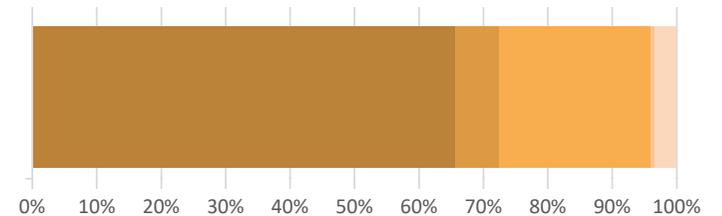
How **Pre COVID-19** era students booked their language course



■ Online	36.97%
■ Through a local educational institution in your home country	5.40%
■ Through an agency / In-person	52.10%
■ Through your company	3.84%
■ Other (please specify)	1.69%

These results show that the vast majority of **COVID-19** era **IALC** students relied on the internet to book their language course.

How **COVID-19** era students booked their language course



■ Online	65.67%
■ Through a local educational institution in your home country	6.74%
■ Through an agency / In-person	23.59%
■ Through your company	0.62%
■ Other (please specify)	3.38%

It is unsurprising that prospective language school students have moved online to book language programmes during the pandemic. The extent of movement towards online bookings is one of the main trends that can be recognised as having a direct causal link to the consequences of **COVID-19**.

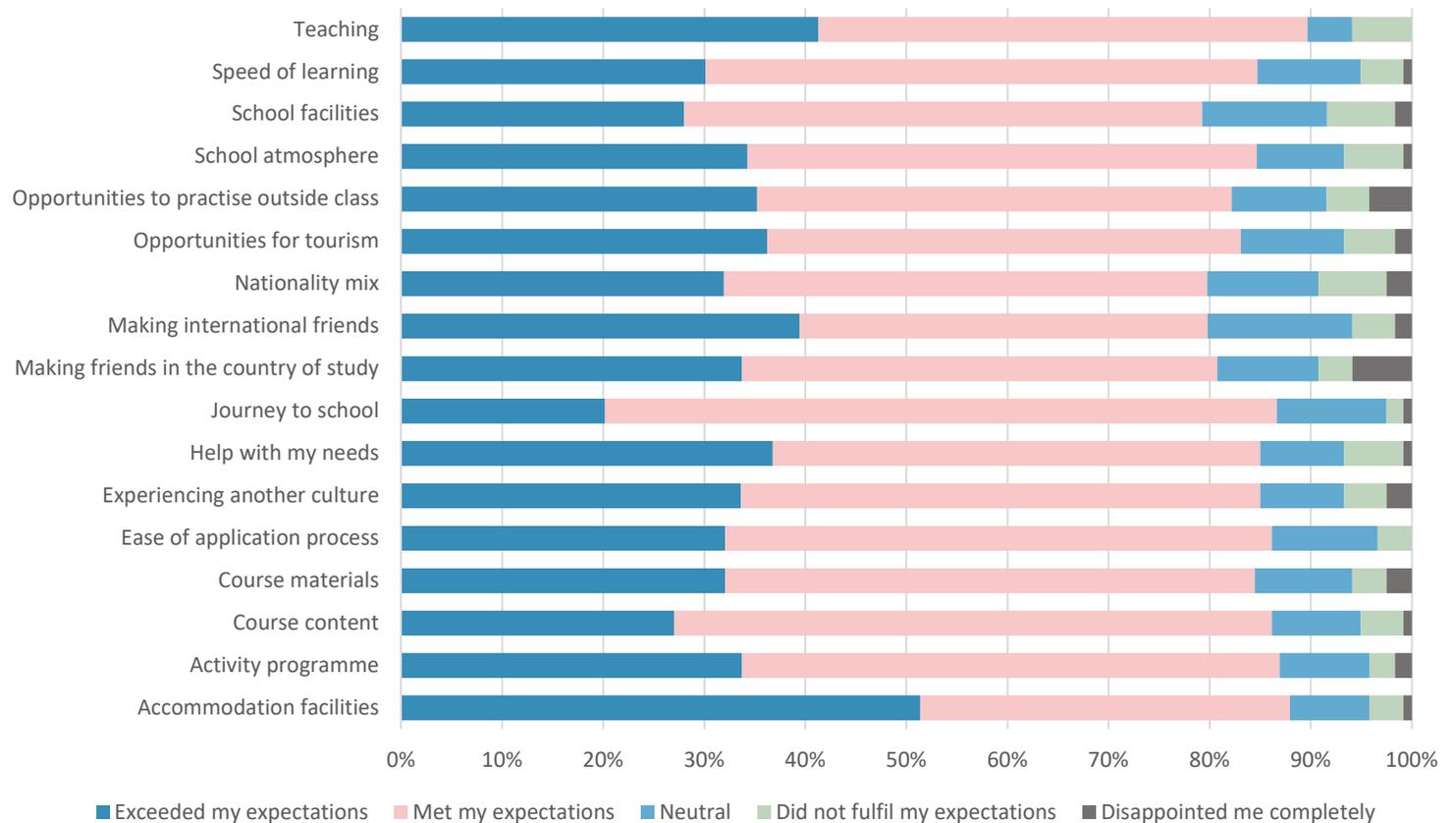
Pre COVID-19
online bookings:
36.97%

COVID-19 era
online bookings:
65.67%

2.2 Fulfilment of expectations (face-to-face teaching)

These questions in the survey were designed to evaluate the level of fulfilment of expectations from both **Pre COVID-19** era and **COVID-19** era students receiving face-to-face tuition. This is an assessment of all students who undertook face-to-face classes at an **IALC** school both before and during the pandemic:

Students' fulfilment of face-to-face teaching expectations in their IALC school



1369 respondents gave feedback on their face-to-face experience at an IALC school - 87.47% of all respondents across the survey.

In total, across both **Pre COVID-19** era and **COVID-19** era students, 1369 respondents gave feedback on their face-to-face experience at an **IALC** school - 87.47% of all respondents across the survey.

On average, 84.24% of students who undertook a face-to-face learning experience said their expectations were either 'exceeded' or 'met'. This is clear evidence of the very high levels of consistency of quality offered by **IALC** schools in all areas of provision.

It is a credit to the quality of **IALC** schools that only 1.72% of students responded that they were left 'disappointed' by their **IALC** language school experience.

Scrutiny of the figures demonstrate that academic and cultural immersion related factors scored very highly when respondents stated that their expectations were either 'exceeded' or 'met'. These findings are very much in line with **IALC's** core values that include the promotion of cultural and professional exchange through studying a foreign language in the country in which it is spoken; representing and conveying expertise in the teaching of foreign languages; and guaranteeing high quality independent language schools.

Teaching (89.67%), Accommodation Facilities (87.95%) and Activity Programme (86.91%), all scored highly in terms of meeting or exceeding students' fulfilment of expectations.

From the start, **IALC's** mission statement has been to provide a **dynamic community of language centres teaching the language in a country where it is spoken**, with the quality of schools central to the Association's values. Face-to-face learning has historically been the essential, sustaining element for all **IALC** schools and the high levels of fulfilment of students' expectations demonstrates that fact.

84.24% of students who undertook a face-to-face learning experience said their expectations were either 'exceeded' or 'met'

2.3 Online learning provision (students who began their course in an IALC school and then moved to online learning)

Face-to-face students who moved online as the pandemic struck in the first months of 2020 were asked to rate the quality of online provision during the sudden shift to online learning. The methodology used in the research study was through a rating scale of 1-10, with 1 being the least positive and 10 being the most positive.

The data reveals that this group, that represented 35% of students from the **COVID-19** era respondents, rated their satisfaction with the sudden switch to an online language experience at an average of 6.06 overall (note that this group had additionally completed elements of the survey that included the face-to-face learning experience).

Given the urgency that schools faced when forced to find alternative means of teaching students when the pandemic struck, with no precedent to draw from, and minimal online learning systems in place, the feedback received from students may be regarded as positive.

Quality of course provision for students moving from face-to-face to online on a scale of 1 to 10 where 10 is highly satisfied and 1 is not satisfied.

Category	Average from the rating scale of 1-10
Quality of support	6.08
Quality of teaching materials	5.98
Quality of teaching staff	6.22
Quality of technology used	6.00
Quality of the language course	6.05

53% of respondents gave teaching a mark of 9/10 or 10/10

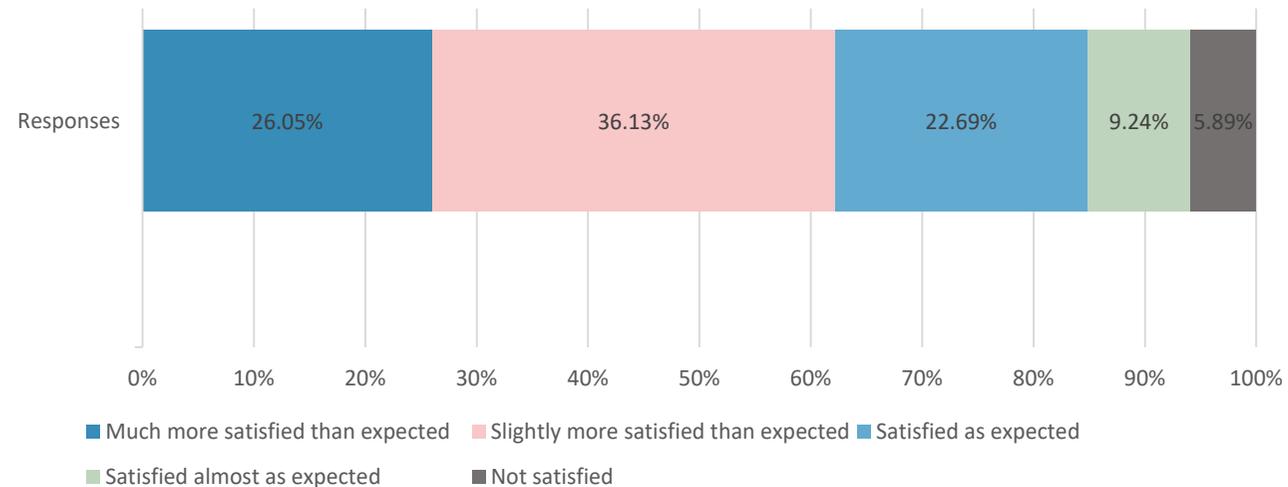
Due to the more limited nature of the online language learning experience in comparison with learning a language face-to-face in a school abroad, respondents who moved online or who were online from the beginning were asked fewer questions about their online experience than those who attended face-to-face classes.

Students were simply asked to rate the quality of the learning across five key measurements: the quality of support, teaching materials, teaching staff, technology used and language course. The quality of teaching remains the stand-out feature across face-to-face and online courses delivered by **IALC** schools, receiving an average of 6.22, with 53% of respondents giving teaching a mark of 9/10 or 10/10 and this attests to the high standards of tuition provided by the schools.

The quality of teaching materials (5.98), technology used (6) and quality of the language course (6.05) ranked lowest across these 5 measurements. This is unsurprising given that **IALC** schools had very little time to prepare for the shift to online learning and were all, in a pre-pandemic world, language centres geared towards face-to-face teaching whose central ethos was to teach a language in the country in which it is spoken.

The 35% of **COVID-19** era students who began learning face-to-face, but were forced online as a result of the pandemic, were then asked to evaluate, all factors considered, how satisfied they were with the tuition received online:

All factors considered, how satisfied have you been with the tuition you have received online?



Overall, 85.07% of respondents were satisfied as expected or better with their online language learning experience having started their course in school with face-to-face classes.

2.3.i Online learning provision (157 students whose courses were online from the beginning)

Respondents who were recruited as online students from the beginning, during the period 1 March 2020 – 9 October 2020, constituted 24% of the **COVID-19** era body – 157 respondents in total.

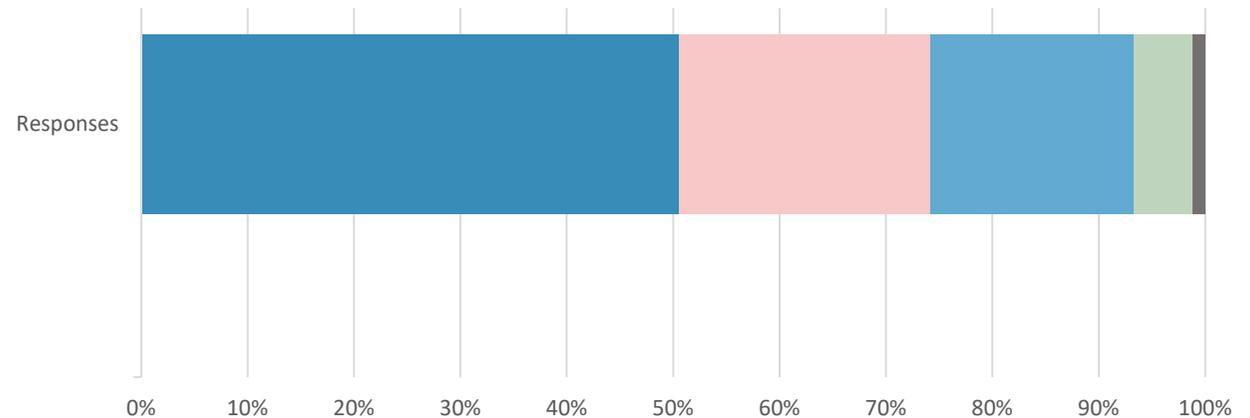
Quality of course provision for fully online students on a scale of 1 to 10 where 10 is highly satisfied and 1 is not satisfied..

Category	Average from the rating scale of 1-10
Quality of support	6.40
Quality of teaching materials	6.42
Quality of teaching staff	6.64
Quality of technology used	6.45
Quality of the language course	6.67

The data reveals that the 24% of COVID-19 era students, who were recruited as online students from the beginning, rated their language experience at an average of 6.51 overall: a higher average than the students that were forced to abandon their face-to-face courses and go online due to the rapid emergence of the pandemic.

These same students were then asked to evaluate how satisfied they were with the tuition received online:

All factors considered, how satisfied have you been with the tuition you have received online?



	Responses
■ Much more satisfied than expected	50.56%
■ Slightly more satisfied than expected	23.60%
■ Satisfied as expected	19.10%
■ Satisfied almost as expected	5.62%
■ Not satisfied	1.12%

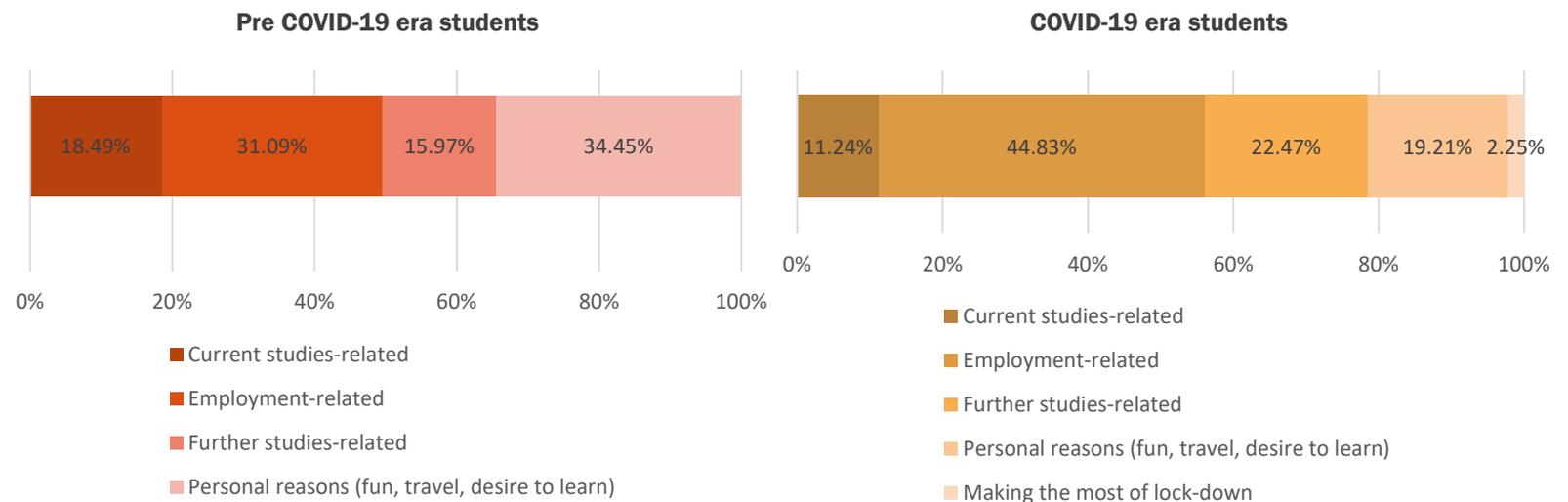
Overall, 93.26% of respondents in this category were satisfied as expected or better with their online language learning experience, an average that is 8.19% higher than the cohort of face-to-face students that moved online when the pandemic struck. Students who received tuition exclusively online were recruited later than those who had commenced their studies face-to-face before moving to online learning.

It is probable that their greater levels of satisfaction were due to **IALC** schools adapting better over time to the challenges of providing tailored online courses. The high levels of satisfaction expressed by students for the tuition they received online reflects the quality of teaching provided by **IALC** accredited schools.

Chapter 3: Reasons for learning a language abroad

Further scrutiny of feedback from **Pre COVID-19** era and **COVID-19** era students reveal further trends that accentuate the dramatic shift in student intentions and experiences in a pre-and-post **COVID-19** world.

3.1 What was the most important reason you chose to study a foreign language abroad?



Both **Pre COVID-19** era and **COVID-19** era students were asked 'what was the most important reason you chose to study a foreign language'.

For **Pre COVID-19** era students, 34.45% of students selected the primary reason to learn a language was for 'personal reasons (fun, travel, desire to learn)'.

This is in contrast to **COVID-19** era students, where 'Personal reasons (fun, travel, the desire to learn) constitutes only 19.21% of the research sample.

The primary reason given for **COVID-19** era students to choose to study a foreign language is for ‘employment related’ purposes, which now constitutes 44.83% of the respondent feedback.

The pandemic has caused substantial job losses in many countries world-wide and led to government funded support schemes and fiscal packages to enable workers to remain in employment even though their working hours have been temporarily reduced or cut to zero. It is therefore unsurprising that given the present uncertainty in job markets ‘employment related reasons’ should feature so prominently, as students become more pragmatic in their learning objectives and their primary goal shifts to employment prospects through improvement of their skill sets.

COVID-19 era students were given the option to select ‘making the most of lock-down’ as a factor in their decision to learn a language online, but only 2.25% of the respondents selected this as ‘the most important reason for studying a foreign language’.

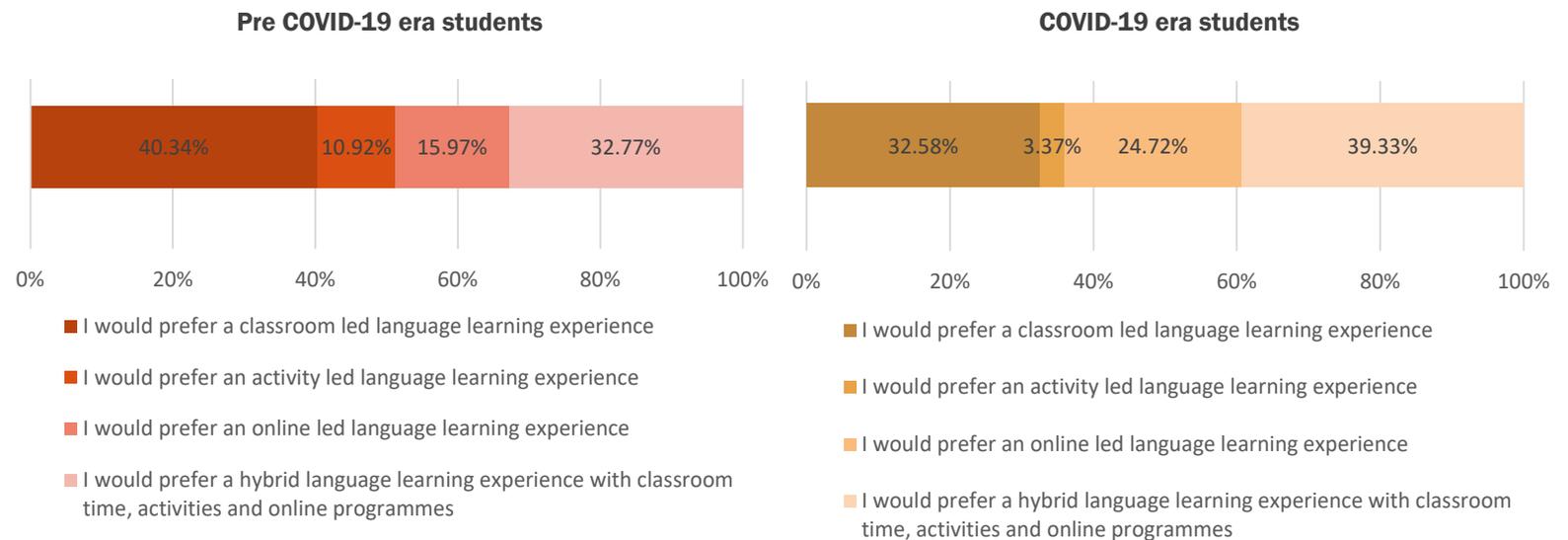
The data provides a vivid and insightful picture into the fluid intentions of students caused by the pandemic; as demonstrated by the move away from learning a language for Personal reasons (fun etc) to Employment related. IALC schools can meet this new demand for Employment related tuition by focusing their programmes on business language training and professional courses to support the change in students’ intentions and motivations for learning a foreign language.

44.83% of
COVID-19
students choose
to study a foreign
language for
‘employment
related’ reasons.

3.2 Perfecting the language school experience

Both the **Pre COVID-19** era and **COVID-19** era students were asked what their ideal language learning experience would be in light of the **COVID-19** pandemic. The leading preference for **Pre COVID-19** era students would be to join a 'classroom led language learning experience' with 40.34% of the share.

In the light of the COVID-19 crisis, what would be your ideal language learning experience?



That the traditional 'classroom led experience' leads the way for **Pre COVID-19** era students was an expected outcome, as all student respondents in this bracket received classroom led tuition.

However, 32.77% of **Pre COVID-19** era students selected the option that in light of the **COVID-19** pandemic, they would now choose a 'hybrid language learning experience'. In this sense, a 'hybrid language learning experience' is a combination of classroom time, activities and online programmes. An additional 15.97% of **Pre COVID-19** era student respondents responded that they would prefer an 'online led language experience'.

Finally, the smallest share of respondents is those who would prefer an ‘activity led language learning experience’ with 10.92% of the share. Activity led programmes can be provided far more effectively in schools than online, so it is reasonable to assume that this group would welcome a return to traditional face-to-face language courses once conditions allow.

For **Pre COVID-19** era students, their primary goal is to seek high quality language tutoring either face-to-face, hybrid, or fully online, and activities are of little interest.

For **COVID-19** era respondents, their stated preference would be to undertake a hybrid language learning experience. This received the majority (39.33%) of the share of responses, whereas 32.77% of **Pre COVID-19** era students selected this option.

32.58% of **COVID-19** era respondents chose the ‘classroom led language learning experience’ while 40.34% of **Pre COVID-19** era students chose this option.

Finally, 24.72% of **COVID-19** era students indicated that they would prefer an ‘online led language learning experience’ whereas 15.97% of **Pre COVID-19** era respondents selected this option.

Overall, these results indicate that the majority of language school respondents in a post-**COVID-19** world would prefer a hybrid learning experience or a fully online programme, and therefore online tuition should remain at the forefront of the language learning experience offered by **IALC** schools for the foreseeable future, or until such a time that full confidence in global travel has been sufficiently restored.

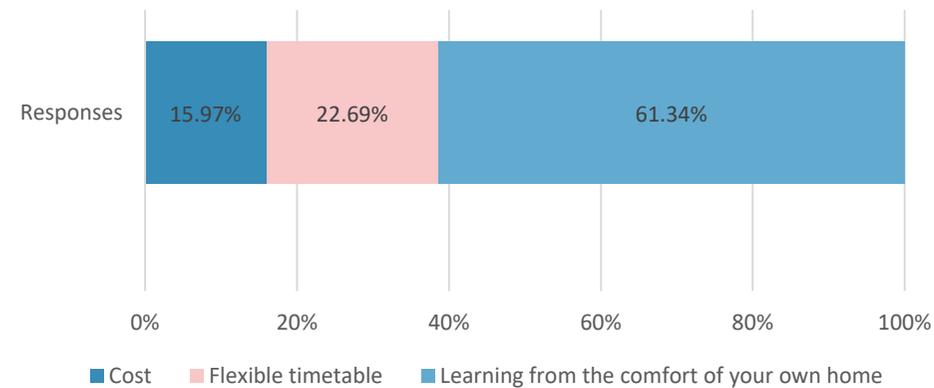
As news of effective vaccines are showing increasingly encouraging signs, there are hopes that the world will return to ‘normality’ in the not too distant future. However, until such a time arises, **IALC** schools will look to maintain and enhance the online programmes and other measures they have already introduced.

3.3 Advantages of online language learning

All 1565 student respondents were invited to share their views on what they felt was the main advantage of online tuition.

61.34% of **Pre COVID-19** era and **COVID-19** era students expressed that learning from your home was the main benefit of online tuition. 22.69% selected flexible timetable and 15.97% chose cost.

What is the main advantage of online tuition?



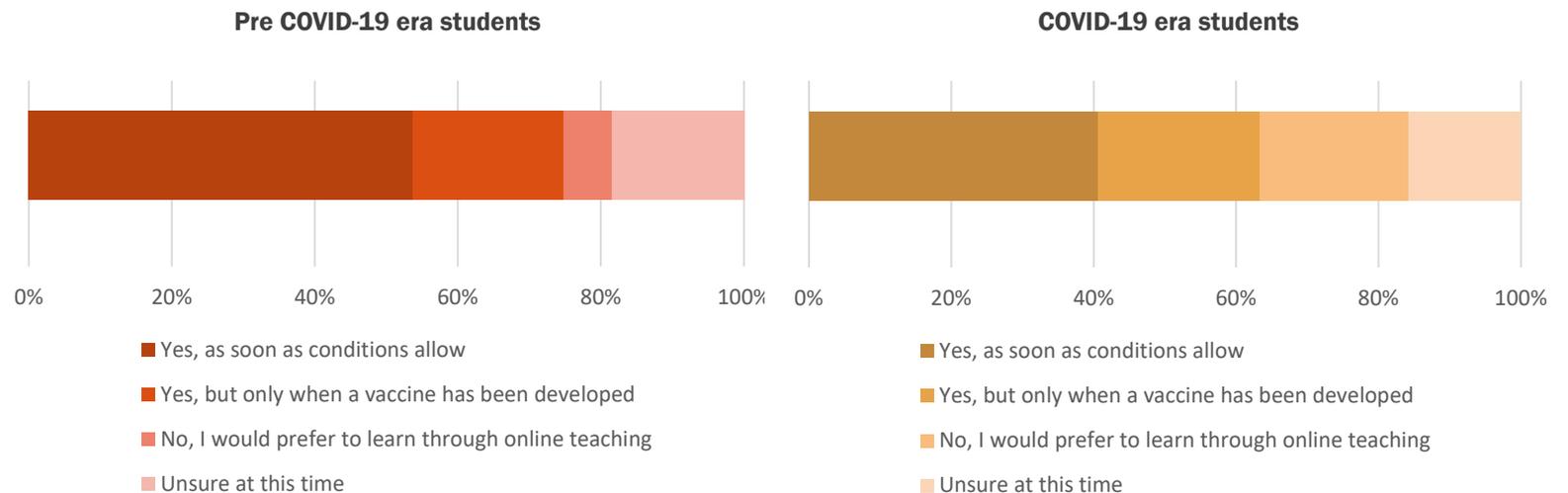
Chapter 4: Assessment of long-term impact of COVID-19 on the IALC student experience.

To conclude the study, the researchers assessed the long-term impact of the pandemic on the **IALC** student experience. The outcomes shed light on the proportion of respondents who would travel abroad to learn a language again, and how likely they would be to do so in the next 1-5 years.

4.1 The future

Both **Pre COVID-19** era and **COVID-19** era students were asked whether they would travel abroad to learn a language again following the **COVID-19** crisis.

Pre COVID-19 era students: Following the COVID-19 crisis, would you travel abroad to learn a language again?



Almost 54% of **Pre COVID-19** era students stated that they would travel abroad again as soon as conditions allow. This gives reason for optimism with the majority of this group indicating that they would be ready to learn abroad again, as soon as it is safe to do so.

21.01% of respondents indicated that they would only travel abroad again once a vaccine has been developed. Only 6.72% of respondents stated that they would prefer to learn (exclusively) online, while 18.49% were 'Unsure at this time'.

In general, the study travel industry will be reassured to learn that 74.79% of **Pre COVID-19** era students stated that they 'would travel abroad to learn a language again when conditions allow, or a vaccine has been developed.

It is worthwhile restating here that all of the **Pre COVID-19** era students received face-to-face tuition at **IALC** schools and enjoyed the benefits of language immersion in the country in which the language is spoken.

It is important to note that the responses received reflect the time in which the survey was created and the period in which students were requested to deliver their feedback.

The survey was formulated in the spring of 2020 and distributed to students between 17 August 2020 – 9 October 2020.

Only 40.56% of the **COVID-19** era students said they would travel abroad to learn a language as soon as conditions allow. This could be due to the fact that 24.00% of these students were taught online from the outset and have not studied abroad at an **IALC** school in the past. Therefore, they will not be familiar with the multitude of benefits provided by learning and experiencing a foreign language in its cultural context.

In total, 63.29% of respondents in the **COVID-19** era group still showed a preference for traveling abroad to learn a language either once conditions allow, or when a vaccine has been developed.

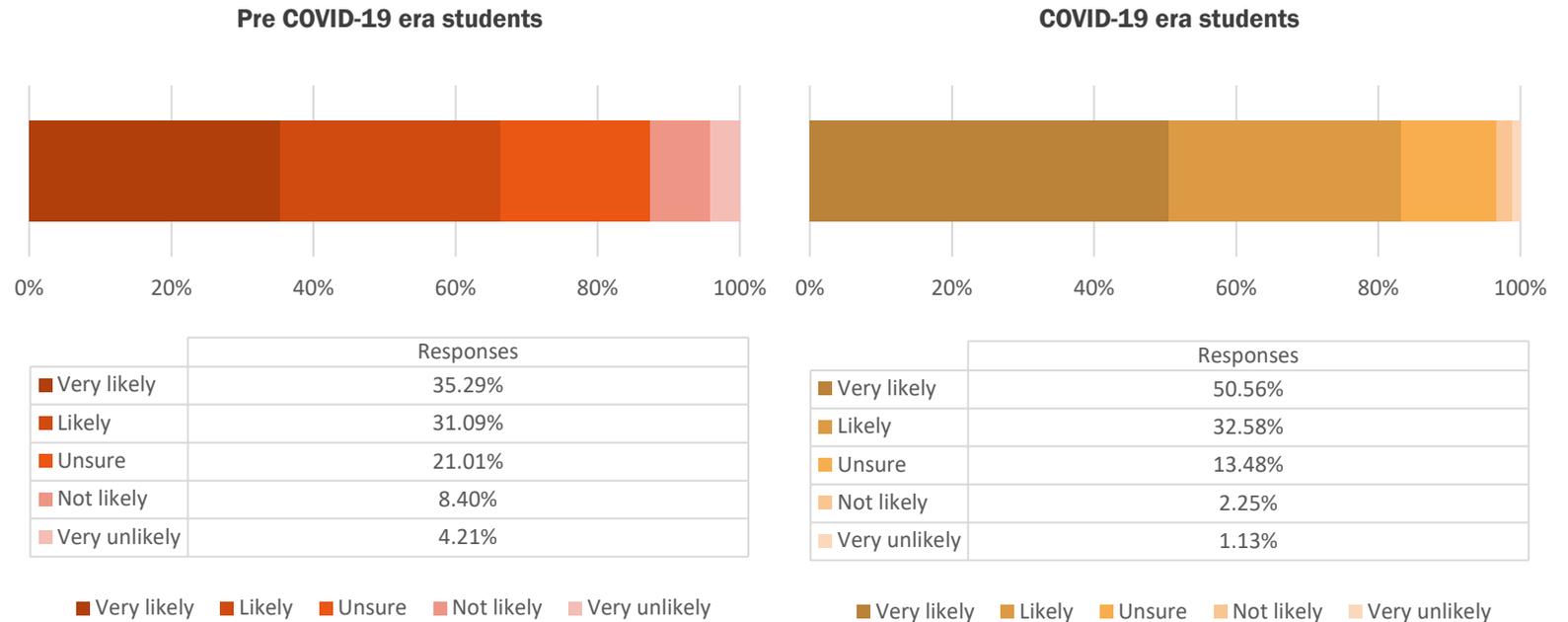
20.98% of **COVID-19** era students stated that they would prefer to learn through online teaching. Again, much of this may be attributable to factors noted earlier in the report, such as the ease of 'learning from the comfort of your own home', and the fact that nearly a quarter of the **COVID-19** era cohort were taught online from the outset. This suggests that there may be a long term future in online tuition regardless of a pandemic that restricts travel.

Ultimately, it will take time for confidence within the student market to be restored. The industry has never experienced such a turbulent period. The key cause for optimism here is that 52.78% of **Pre COVID-19** students and 40.56% of **COVID-19** era students would travel abroad to learn a language as soon as conditions allow. These figures rise to 74.79% and 63.29% when combined with the roll out of a successful vaccine. These are positive indicators for the future for the language travel industry, given the enormous disruption faced by the industry during the pandemic.

4.2 The future of online.

All students were asked how likely they were to learn a language online in the next 1-5 years.

How likely are you to learn languages online in the next 1-5 years?



For **Pre COVID-19** era students, 35.29% stated that they would be 'very likely' learn a language online in the next 1-5 years with a further 31.09% stating that they would be 'likely' learn a language online in that time. Only 8.40% stated 'not likely' and 4.21% stated that this was 'very unlikely'.

In comparison, 50.56% of **COVID-19** era students stated that they would be 'very likely' to learn a language online in the next 1-5 years with an additional 32.58% stating that they would be 'likely' to learn a language in that time.

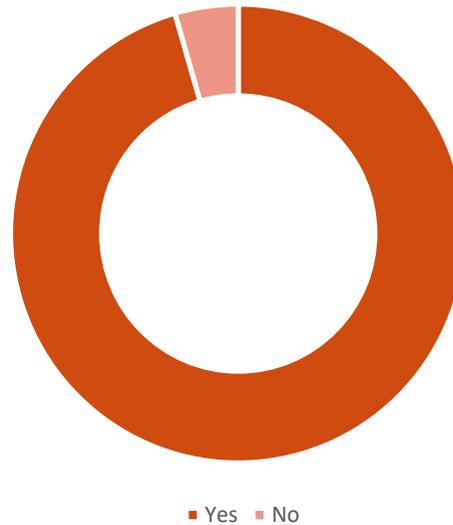
The combined total of 83.14% stating they are 'very likely or 'likely' to learn languages online in the next five years is a positive outcome for the language learning industry as a whole. Only 2.25% stated 'not likely' and a low 1.13% stated that this was 'very unlikely'.

The combined total of 83.14% stating they are 'very likely or 'likely' to learn languages online in the next five years is a positive outcome for the language learning industry as a whole.

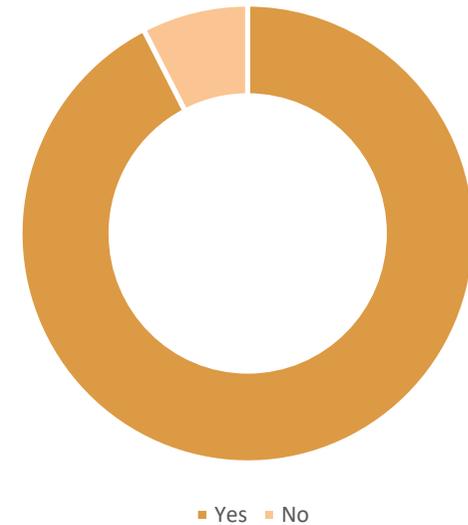
4.3 Would you recommend the school to a friend?

Students were asked the question whether they would recommend their course to a friend.

Pre COVID-19 era students



COVID-19 era students



93.97% of all surveyed students stated they would recommend their IALC course to a friend.

For **Pre COVID-19** era students, an impressive 95.51% of students would recommend their school to a friend.

92.44% of **COVID-19** era students stated they would recommend their **IALC** language school course to a friend. The fact that such a high proportion of **COVID-19** era students were so positive about their learning experience represents a resounding endorsement of **IALC** schools as schools adapted quickly to the challenges caused by the pandemic.

In total, across both groups, 93.97% of all surveyed students stated they would recommend their **IALC** course to a friend. These findings correlate almost identically with the figures from the 2017 **IALC** Research Report, in which 94% of respondents gave the same response. Such continuity of the high level of quality learning delivered by **IALC** schools, marked by the positivity of students, is a compelling marketing tool that **IALC** schools can leverage to prospective students and partners alike.

Chapter 5: Conclusions: Key findings

The conclusions drawn from this report give cause for a cautious optimism, while revealing the necessity for schools to continue to evolve the successful online programmes they introduced when the pandemic first struck.

One key finding that ran consistently throughout the survey was the very high standard and quality of tuition provided by **IALC** schools. This crucial theme applied for both the **Pre COVID-19** era group, 100% of whom studied exclusively in school, receiving face-to-face tuition and the fully immersive package of learning a language in its cultural context; and the **COVID-19** era group, who either began their studies face-to-face before moving online, studied online throughout their **IALC** course, or received face-to-face or 'hybrid' learning at **IALC** schools that re-opened during the pandemic.

IALC schools demonstrated impressive adaptability when the pandemic forced them to close as face-to-face language institutions and change to online learning centres. This is reflected in the high levels of satisfaction felt by respondents when asked to rate their online learning experience. The fact that an average of 93.97% across **Pre COVID-19** era and **COVID-19** era students would recommend their **IALC** school to a friend is an almost identical match to the 94% of students who gave the same response when asked this question in the 2017 **IALC** report. This, and further data contained in the report concerning the online learning experience, attests to the exceptional quality and adaptability of **IALC** schools.

An important finding was the change in the way that students booked their language course. 52.10% of **Pre COVID-19** era students were recruited by agencies and 36.97% booked online. However only 23.59% of **COVID-19** era respondents stated that they were recruited by agents, whereas nearly 66% booked online.

Indications of the profound impact of **COVID-19** on students' lives and plans for future language learning preferences are observed in the survey's exploration of what the ideal language learning experience would be in the wake of the pandemic.

The majority, 40.34% of **Pre COVID-19** era respondents, still prefer a classroom led experience. However 32.77% opted for 'hybrid' learning, a combination of classroom time, activities and online programmes. An additional 15.97% stated their preference would be for exclusively online learning. In **COVID-19** era respondents, these findings are magnified, with the majority, 39.33% stating their preference would be for 'hybrid' language learning and 24.72% opting for exclusively online learning. Respondents choosing a classroom led learning experience dropped to 32.58% among this group. In addition, when all students were asked whether they are likely to learn a language online in the next 1-5 years, 66% stated they would be likely or very likely to do so, 21% were unsure and 13% declared they were not likely or very unlikely to do so.

Encouragingly, 74.79% of the **Pre COVID-19** era group stated that they would travel abroad to learn a language again, either once conditions allow, or when a vaccine has been found. 18.49% were unsure at this time and only 6.72% stated they would prefer to learn online. In the **COVID-19** era group, 63.29% would travel abroad to learn a language, 15.73% were unsure at this time and 20.98% stated they would sooner learn online.

IALC schools specialise in language immersion training where the language is spoken, allowing students to practice in real-life situations, make friends and travel the world, as it is acknowledged that fluency, vocabulary and confidence is increased

at a faster rate. These principles have formed the bedrock of **IALC** since its inception, and although the appetite remains for students to learn a language abroad, there is no escaping the reality that the language travel industry is currently in crisis and continued adaptation by **IALC** member schools to the 'new normal' is crucial to its future.

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