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Even as I write this letter, the impacts of the COVID-19 pandemic are being keenly felt throughout our global education systems. Schools around the world had to close doors due to the outbreak, pushing us as educators to test our readiness in virtual instruction and resilience while still making a human connection despite the lack of contact.

Even as our schools have begun to reopen and our economies look towards recovery, many things have changed irreversibly.

Global unemployment and future opportunities for our workforces are areas that all nations are watching closely. Per the International Labour Organization (ILO) lockdown measures have affected almost 2.7 billion workers as of this writing. The agency's latest analysis reveals that the impact of the pandemic on employment “far exceeds” that of the 2007-2009 financial crisis.

The pandemic has also disrupted higher education, a critical determinant of national success and economic growth. In particular, opportunities to study abroad at universities in the United States, U.K., Australia, and China have been temporarily curtailed.

The good news is that technology solutions have helped connect teachers and programs around the world. Korea continues to share its knowledge and promote excellence across borders.

Now more than ever, we need to be thinking globally as educators to ensure that our youth are equipped to access opportunity across multiple platforms. Language proficiency will continue to be a connector and a key factor for Korea’s future readiness as many jobs go digital and will require teams from across the world to tackle the world's problems.

To quote the World Bank’s view on our sector’s resilient recovery: “The role of education in promoting social cohesion, economic growth, and technological and scientific advancement cannot be underestimated. For individuals, education helps to develop the skills, attitudes, and behaviors necessary to lead healthy, productive, and meaningful lives.”

It is my firm belief that continued access to global forums and opportunities for our students will support recovery and reconstruction at the individual, community, and national levels. The road ahead is steep, but as we look towards resilient recovery, nations are also focused on what it will take to equip the next generation of leaders to thrive in the “new normal”.

Yours in continued health and knowledge,

Haedong KIM
Professor at Graduate School of Education, Hankuk University of Foreign Studies
Former President at Korea Association of Teachers of English
EXECUTIVE SUMMARY

Korean attitudes toward English proficiency are rapidly changing. The general perception that English proficiency in the country is high in addition to the government’s effort to reduce expenditure for private education has subsequently deemphasized the importance of English compared to other skills such as math and science.

While this is the prevailing perception, the results of our study show that Korea’s English proficiency rankings have in fact declined in recent years, together with national average test scores. Neighboring countries are rapidly catching up and have overtaken Korea in some cases, such as Hong Kong.

This public perception coupled with the declining English proficiency at a national level poses critical questions on the relevance of English proficiency as a key to personal advancement and national development.

In early 2020, ETS commissioned a study to explore the impact English proficiency had on the socioeconomic status of young Korean professionals.

The study found that English proficiency plays a critical role in helping aspiring Korean professionals gain an edge in education and early in their careers. English proficiency is key to accessing higher education overseas and the diversity of multicultural experience that comes with it. This in turn gives them an advantage when applying for jobs upon graduation. This advantage extends through their early careers as proficiency in English expands an individual’s access to more opportunities for advancement in the workplace. The survey found that individuals with English proficiency earned more, as they were more likely to be found in the two highest income brackets. Lastly, the survey also found that beyond the individual, most Koreans believe that English proficiency is a critical factor in elevating Korea’s national image and improving the country’s long-term economic outlook.
INTRODUCTION

Many studies and news articles today speculate on what soft and hard skills our youth will require to succeed as global leaders after they graduate. English, in particular, has become the international language for education and business, and having a high level of proficiency within the country is important for Korea, both economically and culturally. As a growing number of Korean students pursue opportunities and experiences in education beyond Korea to prepare themselves for leadership on a global scale, the TOEFL iBT® test could provide the key to unlocking their aspirational goals.

To understand more about the state and importance of English-speaking in Korea, ETS carried out an online survey of 500 full-time working Korean professionals across all major industries between the ages of 24 and 39 who had obtained an undergraduate degree or higher.

These respondents were accessed via Dynata®’s survey panel in the country and were sampled to be representative of the population within this age range.

The study covered three broad areas:

1. The impact of English proficiency in accessing overseas education and unique cultural experiences.
2. The impact that English proficiency has upon graduation, in securing jobs, advancing careers and acquiring new opportunities at work. The study also explored the use of English in the Korean workplace.
3. The role of English in elevating the national image of Korea.
CHAPTER 1.
THE STATE OF THE ENGLISH LANGUAGE IN KOREA

Korea has had a long-standing aspiration to lead the region in English proficiency. Cultivated over several generations, having a high level of proficiency in English derived from obtaining a good test score has become an essential gateway for applications to schools, higher education, and jobs.

Where does Korea stand now in regard to English proficiency?

The perception is that English proficiency is better in Korea than elsewhere in the region. The ETS Survey on English Speaking in Korea (hereinafter “Survey”) shows that three-quarters of respondents said English proficiency in Korea is better than in neighboring countries such as Japan and China. Only one in 10 thinks that it is worse than in other countries.

However, in fact, Korea is no longer amongst the regional top tier. According to the EF EPI English Proficiency Index®, a globally recognized metric for national English proficiency, Korea’s English proficiency dropped from 13th place (out of 44 countries in the world) in 2011 to 37th place in 2019 (out of 100 countries in the world). Meanwhile, the level of English proficiency of neighboring countries such as China has increased over the same time period.

Figure 1 Perceived English Proficiency in Korea Compared to Neighboring Countries

Source: ETS Survey on English-Speaking in Korea (2020), N=500
Data from ETS’s Average TOEFL® Score Trends concurs that the average TOEFL test score has dropped for Koreans whereas it has improved in Japan and China since 2013. While the average TOEFL score from the neighboring non-English speaking countries in the region has increased or remained the same, Korea is the only country where the average TOEFL score has dropped. For example, Hong Kong, whose average TOEFL score in 2013 was lower than Korea’s at 83, is now leading Korea’s and is 5 points ahead at 89.

The gap in the perception of Koreans’ English proficiency versus the actual measurable realities of the country's declining ranking and average test scores should be a major concern to Korea as it seeks to retain its competitiveness in the world economy and future-proof its workforce. Our subsequent survey data shows a correlation between English proficiency and development at both the individual and national level.
CHAPTER 2.
IMPACT OF ENGLISH PROFICIENCY IN SELF-IMPROVEMENT AND NATIONAL DEVELOPMENT

Being proficient in English opens up opportunities for self-improvement, both academically and professionally, while also improving Korea’s global standing.

At the individual level, more than nine in 10 surveyed agree that it leads to better career prospects (nearly 90% also recommend it from a “cultural experience perspective”). From the national perspective, 85% think that having more Koreans with English-language capabilities will boost the economy and 75% think it would improve the image of Korea worldwide.

Speaking English is seen by a wide majority as good for both individuals and Korea

- A very strong majority (more than nine in 10) feel Koreans who speak English enjoy better career prospects.
- 85% think having more Koreans who speak English will help the Korean economy.
- Three-quarters also say that higher levels of proficiency will improve Korea’s image on the global stage.

**Figure 4 Speaking English and Opportunities for Individuals and the Nation**

<table>
<thead>
<tr>
<th>In general, Koreans who speak English have better career prospects than those who do not</th>
<th>Completely Agree</th>
<th>Rather Agree</th>
<th>Rather Disagree</th>
<th>Completely Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>42%</td>
<td>51%</td>
<td>7%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Having more Koreans who speak English will help the country grow a stronger economy</th>
<th>Completely Agree</th>
<th>Rather Agree</th>
<th>Rather Disagree</th>
<th>Completely Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>31%</td>
<td>54%</td>
<td>14%</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Having more Koreans who speak English will improve the image of Korea worldwide</th>
<th>Completely Agree</th>
<th>Rather Agree</th>
<th>Rather Disagree</th>
<th>Completely Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>26%</td>
<td>49%</td>
<td>21%</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Figures are reported to the nearest whole percentage point. Therefore, cumulative figures may not total up to 100%.

**Source:** ETS Survey on English-Speaking in Korea (2020), N=500
Hypothesis 1.
English proficiency is vital in opening up access to study abroad and exposure to unique cultural experiences

This is confirmed in our survey —

Eight in 10 who took an English-proficiency test such as TOEFL iBT before studying abroad agree it prepared them and gave them the confidence necessary to succeed. “Taking an English-language test before studying abroad prepared me for university and gave me the confidence I needed to succeed there.”

More importantly, Koreans who have studied abroad in an English-speaking country said that it helped them both culturally and professionally. According to the Survey, studying in an English-speaking country is highly recommended from a cultural perspective. 87% of those studying in an English-speaking country said that they “would recommend studying in an English-speaking destination to others, as it broadens exposure to unique cultural experiences.”

Source: ETS Survey on English-Speaking in Korea (2020), N=500
Additionally, almost all Koreans who studied in an English-speaking country would recommend others do so for career prospects. 89% agreed, with very few disagreeing, “I would recommend others to study in an English-speaking destination, as it **opens doors in your career** that may not have otherwise been available.”

**Note:** Figures are reported to the nearest whole percentage point. Therefore, cumulative figures may not total up to 100%.

**Source:** ETS Survey on English-Speaking in Korea (2020), N=500
This is confirmed in our survey —

2-1. Impact of English Proficiency on Employment
A majority of English-speaking Koreans said that their ability was an important factor in landing their current job. The proportion who said their English ability helped them get hired is notably higher among those who self-claimed to be proficient in English and among those who took the TOEFL iBT test.

Figure 8 Importance of English Ability and TOEFL iBT to Getting Hired

Note: Figures are reported to the nearest whole percentage point. Therefore, cumulative figures may not total up to 100%. 
Source: ETS Survey on English-Speaking in Korea (2020), N=500
2-2. Impact of English Proficiency and Career Progression
Two-thirds of English-speakers said their language skills have opened up more professional opportunities. Those who said that their skills have opened up more opportunities is, again, notably higher among those who self-claimed to be proficient in English and among those who took the TOEFL iBT test.

Nearly half of those who are not proficient in English felt that this led to missed professional opportunities. Thinking about their current job and any they have had previously, respondents who are not proficient in English felt that their lack of English-language skills could have prevented them from potential career opportunities, for example, working with certain clients or on particular projects, receiving a promotion, or going on a business trip.

Note: Figures are reported to the nearest whole percentage point. Therefore, cumulative figures may not total up to 100%. Source: ETS Survey on English-Speaking in Korea (2020), N=500
English is seen as the language that can best facilitate desired career elements — both material elements and cultural ones — when getting hired and pursuing their career path as compared to other languages.

**Figure 11  English Proficiency’s Impact on Fulfilling Career Elements (in order of desired career elements)**

<table>
<thead>
<tr>
<th>Career Element</th>
<th>English Important</th>
<th>Chinese Important</th>
<th>Japanese Important</th>
<th>Language Not Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Having a good work-life balance</td>
<td>65%</td>
<td>3%</td>
<td>2%</td>
<td>31%</td>
</tr>
<tr>
<td>Greater job stability than I have now</td>
<td>73%</td>
<td>8%</td>
<td>1%</td>
<td>17%</td>
</tr>
<tr>
<td>Being better paid than I am now</td>
<td>79%</td>
<td>11%</td>
<td>1%</td>
<td>9%</td>
</tr>
<tr>
<td>Having more responsibility than I do now</td>
<td>79%</td>
<td>13%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Having a job that feels like it makes a positive difference in the world</td>
<td>88%</td>
<td>2%</td>
<td>7%</td>
<td>2%</td>
</tr>
<tr>
<td>The chance to live and work abroad</td>
<td>90%</td>
<td>7%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Being able to work with people from different cultures</td>
<td>90%</td>
<td>7%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>The chance to travel abroad</td>
<td>95%</td>
<td>0%</td>
<td>4%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*Source: ETS Survey on English-Speaking in Korea (2020), N=500*
Notably, the survey data shows a strong correlation between English proficiency and income. Those who are proficient in English are most likely to earn in the highest two income brackets. Those who have no proficiency are most likely to earn in the lowest bracket.

<table>
<thead>
<tr>
<th>Income Bracket</th>
<th>Proficient in English</th>
<th>Semi Proficient in English</th>
<th>Non Proficient in English</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 2,000,000</td>
<td>6%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>More than 2,000,000 but less than 3,000,000</td>
<td>20%</td>
<td>31%</td>
<td>36%</td>
</tr>
<tr>
<td>More than 3,000,000 but less than 4,000,000</td>
<td>31%</td>
<td>35%</td>
<td>26%</td>
</tr>
<tr>
<td>More than 4,000,000 but less than 5,000,000</td>
<td>22%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>More than 5,000,000</td>
<td>19%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>I do not want to answer</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Note:** Figures are reported to the nearest whole percentage point. Therefore, cumulative figures may not total up to 100%.

**Source:** ETS Survey on English-Speaking in Korea (2020), N=500

“The interaction between English proficiency and gross national income per capita is a **virtuous cycle**, with improving English skills driving up salaries, which in turn give governments and individuals more money to invest in language training. On a micro level, **improved English skills allow individuals to apply for better jobs and raise their standards of living.**”

**Source:** World Economic Forum and Harvard Business Review (2017)
Hypothesis 3.
English proficiency among Koreans can help improve Korea’s international image

The ability to have better English proficiency to improve the image of Korea on the international scene is particularly important as Korea currently lags behind many of its regional neighbors in key global “soft power” rankings including the Soft Power 30. A recent global study of 30 countries, measuring the ability to achieve objectives through attraction and persuasion, reported the country ranks:

In addition, the sentiment that English proficiency among Koreans can help improve Korea’s image in international society is also confirmed by the survey.

85% agreed: “Having more Koreans who speak English will help the country grow a stronger economy.”

75% think higher levels of English proficiency will improve Korea’s image on the global stage.

Haedong Kim,
Professor at Graduate School of Education, Hankuk University of Foreign Studies

“Educating Koreans to truly communicate in English and enabling them to participate in the global economy is key to improve Korea’s national image.”

Note: Figures are reported to the nearest whole percentage point. Therefore, cumulative figures may not total up to 100%.

Source: ETS Survey on English-Speaking in Korea, 2020
### Figure 16  Koreans Emigrating Abroad, by year

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>USA</th>
<th>Singapore</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>1607</td>
<td>97</td>
<td>116</td>
<td>307</td>
</tr>
<tr>
<td>2014</td>
<td>1679</td>
<td>118</td>
<td>249</td>
<td>175</td>
</tr>
<tr>
<td>2015</td>
<td>2903</td>
<td>640</td>
<td>364</td>
<td>75</td>
</tr>
<tr>
<td>2016</td>
<td>4811</td>
<td>1031</td>
<td>642</td>
<td>353</td>
</tr>
<tr>
<td>2017</td>
<td>5118</td>
<td>1079</td>
<td>505</td>
<td>385</td>
</tr>
<tr>
<td>2018</td>
<td>5783</td>
<td>1380</td>
<td>405</td>
<td>397</td>
</tr>
</tbody>
</table>

Source: Ministry of Employment and Labour (MOEL)

The COVID-19 disruption has supercharged the move to digitize the economy, accelerating the adoption of new technologies to organize our social and working lives. Someone might question if pursuing opportunities outside of Korea is still valid in the future of post-COVID-19 era.

However, in fact, English will matter more than ever before. Digital transformation is changing the face of workplaces as they become more internationalized and borderless, and require the support of individuals with high English proficiency.

### Then what are the core skills that are used frequently in the workplace?

According to our survey, amongst those fully proficient in English, reading, listening, speaking, and writing were equally important. 56% of the professionals who are proficient in English are using reading skills in the workplace. 47% of the professionals write often in English and 46% use their conversation (both listening and writing) English often at work.

Source: ETS Survey on English-Speaking in Korea, 2020
Notably, the same pattern is seen with the usefulness of the TOEFL iBT exam. Taking the TOEFL iBT exam is particularly linked to using integrated English communication skills as they are required and used in the workplace. That is because in the working environment - all four areas are required: reading, listening, speaking, and writing. Studying to take the TOEFL iBT exam, professionals learn and develop these four skills and the ability to collectively use them together, an ability that is a true strength in the workplace.

Figure 18 Use of English skills at Work

Paul Lee,
Country Manager of ETS Korea

“English proficiency is no longer an option for Koreans entering the global workforce, it is a must. As more and more Koreans thrive in the global stage, we must never lose focus on equipping our talent with the right skills to help them build their success in the world.”
CONCLUSION

The findings of our study show that English proficiency plays a critical role not only in the socioeconomic advancement of individual Korean professionals but also the national development and overseas image of Korea as a whole. More doors are opened to individuals with proficiency in English as compared to their peers. They are presented with options to study overseas whilst gaining meaningful cultural experiences which are often thought to be an edge in pursuing careers.

However, a deeper study in the data revealed that amongst English proficient speakers, the type of English test taken also mattered in the individual's ability to leverage English proficiency to their advantage. Our study found that individuals who had taken the TOEFL iBT test in particular, were more likely to find that their English capability gave them an edge in work, career progression and income. In addition, English proficiency continues to be closely linked to Korea's future prosperity, and its current trend of decline should be of urgent concern.

As the world becomes more globalized, accelerated digitization will make future workplaces more international and borderless than ever. English will become the connector and the basis for the Korean workforce to remain competitive and engaged in the future world economy.

To find more information on the new ways to assess English-language proficiency and make advancements in your understanding of learning the English language, please visit: https://www.ets.org/toefl/research