

# The English UK International Strategy

[2015 - 2017]

# English UK

## International strategy

This document presents our three-year strategy for international promotion and the objective to promote the UK as the world's premier ELT study destination. It is intended to align with and elaborate on the association's strategic goals.

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## 1 The English UK strategic plan

English is probably the UK's most successful export ever and a durable national asset. Our international education sector is admired globally and the English language teaching (ELT) sector is both strategically and economically valuable to the UK.

Yet ELT is now a highly competitive international business and the UK is losing ground. The UK's strengths are up against other factors including lower living costs and ease of getting visas.

English UK's strategic plan aims to give the UK the support it needs and deserves: to rekindle ELT success for the UK's long-term benefit.

### 1.1 Mission, ambition and aims

English UK is a registered charity with a clearly defined purpose documented in the association's charitable objects.

Our mission is to advance the education of international students in the English language.

Our ambition is to be the world's leading ELT trade association.

To achieve this, we have five aims to help UK ELT thrive:

1. Engage with our members and satisfy their needs
2. Pursue a more supportive business environment for the UK ELT sector
3. Support continued improvement and excellence in the UK ELT sector
4. Promote the UK as the world's premier ELT study destination
5. Ensure that the resources of English UK are managed effectively.

## 2 The international strategy

### 2.1 How does the international strategy fit into the English UK strategy?

Competition for ELT students grows every year with English-speaking countries around the world attempting to grow their market share: they see the economic, social and reputational value of this sector and are actively promoting their offer. Yet this effort is not matched in the UK.

The solution is clear: we need additional effort to promote UK ELT globally.

### 2.2 What will the international strategy achieve?

The strategy will be in place for three years from 2015 – 2017. During this time we expect to achieve:

- A stall in the decline of the UK ELT's market volume and value, and a return to a position of overall growth
- An understanding of the UK's market share of the global ELT market in relation to competitor countries
- Improved reach and profile for the UK as the world's premier ELT study destination and ELT educational and commercial partner of choice
- Delivery of a range of international activities, to agreed budgets and quality standards, that engage an increasing number of English UK members and achieve high levels of member satisfaction
- Increased engagement with industry stakeholders around the world, including but not limited to, study abroad agencies, educational tour operators, governments, British Council and British Embassy posts, public and private sector educational organisations, and the corporate sector
- A greater ability to win business for the sector; to foster and manage consortia bids for larger projects and contracts; and to support the development of in-country operations and partnerships through our activities, including a new International Associate Membership model
- A new suite of direct channel activities that will complement our existing agent-facing portfolio and seek to increase face-to-face and online interactions between the association, our members and prospective students and clients around the world

- The development of relationships with strategic partners that allow us to leverage the value of their expertise, promotional activities and resources for the benefit of the UK ELT sector
- An improved ability to measure the UK ELT sector's performance, allowing us and our members to effectively benchmark ourselves in the global marketplace.

### 2.3 How will it be resourced?

£1.6 million of English UK's annual turnover and nine members of staff (six full-time and three part-time) are dedicated to the international strategy.

£80,000 of the £1.6 million is generated from 'in-kind' partnerships with and sponsorship from other organisations and commercial companies active in the international education sector.

Additionally, we will collaborate with strategic in-country partners to leverage the value of their activities and resources for the benefit of UK ELT. Thereby bolstering the association's budget for international promotion.

We anticipate that the division of resources among strategic priorities will evolve during the period covered by this strategy in alignment with our objectives, as shown below.

The percentages suggested are for guidance and may change from year to year in response to global market conditions and operational concerns.

### 2.4 The division of resources

The following tables indicate how resources will be divided according to priority channels and markets at both the start and end of the period covered by the international strategy:

Priority channels	2015	2017
Business-to-business channel	94%	75%
Direct channel	5%	20%
Partnerships, projects and contracts	1%	5%

Priority markets	2015	2017
Tier one		40%
Tier two	prioritisation of global markets into tiers initiated	30%
Tier three		25%
Tier four		5%

### 2.5 How will we evaluate our performance?

Evaluation is a critical component of our international strategy. Given the constrained nature of our resources, it is essential to understand the impact of any activity or project. Robust evaluation will allow us to track our progress and the effectiveness of our approach, and to understand the impact and value of investment, directly informing how we execute future activity. It will also allow us to amend and refine our strategy as necessary during this three-year period.

Other than student data, English UK has few methodologies of evaluation at our disposal. It is difficult to measure or ascribe a financial value to many of our activities or projects. Outcomes are often only evident after a significant length of time. For example, strategic work engaging with key stakeholders in an emerging market. This does not necessarily mean that such activity has no value and should not preclude activity from taking place.

In the absence of sophisticated tools of evaluation, we will use a variety of outputs and outcomes as performance metrics in order to gain a more comprehensive picture. We will establish SMART objectives for each planned activity and project, and assess our outcomes against these.

Performance metrics include:

- Member involvement in our activities
- Member satisfaction with our activities
- Performance against set budgets and financial targets
- New agency uptake to the Partner Agency Scheme
- The number of face-to-face and online interactions with prospective students, clients and their influencers generated from a particular activity
- The number and quality of face-to-face and online interactions with industry stakeholders, including but not limited to, study abroad agencies, educational tour operators, governmental organisations, public and private sector educational institutions and the corporate sector generated by a particular activity
- The extent of our social media reach
- The extent of our media and press coverage
- The number of business and contract wins
- The number of productive (or potentially productive) partnerships forged
- Uptake to International Associate Membership model
- English UK student data.

## 3 Strategic priorities

### 3.1 Priority channels

We have identified three channels through which we will seek international engagement to support UK ELT. These channels do not stand in isolation but instead complement each other, with some activities working across multiple channels.

#### 3.1.1 The business-to-business channel

The business-to-business channel is the route to market whereby ELT centres in the UK rely on commission-based relationships with study abroad agencies or educational tour operators to source and secure new students. 75% of students studying English in the UK have booked their course via an intermediary. As such, this channel is an important route to market.

English UK's international strategy seeks to support the UK ELT sector in the development of productive relationships with agencies around the world.

#### 3.1.2 The direct channel

The direct channel is the route to market whereby ELT centres in the UK engage directly with the client. Clients may be individuals and their influencers (families, teachers), schools and other educational institutions (for group bookings), governmental and non-governmental organisations and corporations.

New technology is transforming the information-gathering and purchasing habits of students and clients, who want more information and opportunity to research and choose their study destinations, though agents remain crucial in many markets.

It is important that the UK ELT offer is well-represented in these online channels to complement the important and continuing work of educational agents.

English UK's international strategy seeks to support the UK ELT sector by developing direct channel activities to complement our agent-facing portfolio.

#### 3.1.3 Partnerships, projects and contracts

Partnerships, projects and contracts is a rapidly developing and increasingly important marketing channel that responds to the demand in certain markets for capacity building, train the trainer programmes, corporate and vocational training, transnational education and alternative delivery models including in-country and online provision.

UK ELT centres may form partnerships with overseas investors, educational institutions or governmental and non-governmental organisations, or may seek to co-operate

with other UK centres as a consortium when tendering for contracts with a larger scope.

English UK's international strategy seeks to support the UK ELT's sector by developing relationships with key in-country stakeholders and creating opportunities for teaching centres to form lucrative partnerships and win business.

### 3.2 Priority markets: the tier system

English UK collects student data from member language centres and departments. We have used this data, together with an assessment of other factors affecting a market's growth potential, to identify which territories should be prioritised for active engagement through our international strategy.

Factors assessed include:

- Growth record and prospects (current market size, year-on-year trends from English UK student data, and country demographics)
- Demand for English (English proficiency and assessment of affinity with the UK)
- Capacity to pay (global economic data on the market's economy, forecast for short, mid and long-term growth, and foreign exchange/currency)
- Existence of significant scholarship programmes
- Connectivity with the UK (proximity, visas and direct seat capacity).

We have collated our priority markets into four tiers according to broad characteristics. This selection does not preclude activity in other markets should exceptional opportunities or new market intelligence arise.

#### 3.2.1 Tier One: Brazil, China, Colombia, Gulf States, Mexico, Thailand and Turkey

These are our most important territories. They have the greatest potential for short to mid-term growth and current impediments to this growth are limited.

These markets have performed robustly in recent years according to English UK student data. Their populations' low level of English proficiency indicate a high demand for ELT, and they show a strong or growing preference for the UK as their study destination of choice. Their economies are strong, and increasingly large numbers of their populations have the capacity to pay for an international education, either through self-funding or significant government scholarship programmes.

# 4 International strategy

## English UK

We expect these markets to become essential to the UK ELT sector in the short to mid-term future, and as such, much of our activity will be focussed on delivering our strategic objectives in these territories.

English UK is planning activities in these markets across all areas of the international strategy. We expect to undertake at least one targeted, market-specific campaign in each of these markets per year, covering at least two of the three priority channels by 2017. This may include an agency event, direct channel campaign or trade mission.

These markets will be singled out for special focus during planning for our regional or global activities (such as the English UK overseas fairs and StudyWorld).

In addition, we will build a global business development network with local in-country representatives in our tier one priority markets. These representatives will be tasked with developing direct channel routes in their market and engaging with key stakeholders in order to create business opportunities for the UK ELT sector.

### 3.2.2 Tier Two: France, Germany, Italy, Japan, Russia, South Korea, Spain, Switzerland and Taiwan

These markets are among the UK's current most important source markets in terms of student numbers, where the potential for large-scale growth is limited but ongoing engagement should be supported through some of the channels of the international strategy.

These territories are in the top 20 source countries for UK ELT, but show limited potential for growth due to demographic decline or a plateauing in the market. Nevertheless, as the cornerstone of many of our members' businesses, English UK will plan activities to maintain and enhance our position in these markets.

Economic data supports the reasoning that these markets continue to have both the capacity and the desire to spend money on an international education. They also have strong connectivity and affinity with the UK.

English UK expects to undertake at least two projects by the end of 2017 in each of these territories. These are likely to be part of regional or global campaigns, or may be add-on activities attached to existing events.

Market-specific activities are likely to be light-touch in terms of resourcing and may include attendance at events run by our partners, virtual or in-person briefings, or activities around specific opportunities.

### 3.2.3 Tier three: Argentina, Azerbaijan, Chile, Hong Kong, Kazakhstan, Maghreb, Mongolia, Peru, Poland, Ukraine, Uzbekistan, Venezuela and Vietnam

These are markets from which the UK receives growing numbers of ELT students; we have existing and productive relationships; and, despite some current obstacles, consolidation and growth are possible through some of the channels of the international strategy.

These emerging markets all rate medium or high in terms of their potential for growth in at least four out of six of the assessed factors.

They are diverse in their characteristics: some may show steady or robust growth, while overall numbers remain small; some may have a strong record of student numbers, but there are significant obstacles preventing them from reaching their market potential; others may currently lack connectivity or affinity with the UK.

What is common to all tier three markets is that we expect them to remain or become important for UK ELT in the mid to long-term.

English UK expects to undertake at least one project in each of these territories by 2017. These are likely to be part of regional or global campaigns, or may be add-on activities attached to existing events.

Market-specific activities are likely to be light-touch in terms of resourcing. Due to the nature of these markets, they may be appropriate for development through the partnerships, projects and contracts channel with activities such as market scoping visits or trade missions.

### 3.2.4 Tier Four: Angola, Egypt, India, Indonesia, Iran, Iraq, Libya and Nigeria

Tier 4 markets are those where we foresee potential for future long-term growth, but where there currently exist significant difficulties or obstacles, be they economic, political or cultural.

English UK activities in these markets will be around market scanning, positioning for the future and developing partnerships with key stakeholders.

## 4. Strategy in action

### 4.1 The business-to business channel

English UK's international strategy seeks to support the UK ELT sector in the development of productive relationships with agencies around the world.

We do this by providing opportunities for teaching centres to meet with pre-screened, reputable educational agencies or educational tour operators, and by raising the profile of the UK as the world's premier ELT study destination and preferred partner of choice among agencies.

These activities were a central feature of previous international strategies, and will continue as an important part of our plans moving forward.

#### 4.1.1 StudyWorld London

Our flagship agent workshop, held in London every September, introduces the world's best educators and agents, building strong student recruitment partnerships through one-to-one meetings and networking.

This event has been running in one form or another since 1969 and attracts 850 delegates from more than 60 countries.

We will conduct a strategic review of StudyWorld in order to assure its continued growth and development.

#### 4.1.2 The English UK Fairs

The English UK Fairs are a series of annual agency (or 'meet the buyer') workshops held in different locations around the world each year.

The primary purpose of the fairs is to allow UK ELT centres to meet with pre-screened and reputable educational agencies in pre-arranged one-to-one appointments. Each fair also features a seminar programme for the sharing of market information and several networking events.

The fairs are supported by the British Council and are attended by in-country British Council staff and commercial officers. They attract around 400 delegates a year, one third of which are UK ELT centres and two thirds regional buyers or key stakeholders.

We will continue to run the English UK Fairs as an important feature of our regional agency engagement around the world.

#### 4.1.3 Roadshows, trade missions and briefings

An important part of our work is to take strong positive messages and information about what English UK member centres offer to agents to priority markets worldwide.

Our roadshows, trade missions and briefings promote the variety, scope and above all, quality of courses offered by English UK members. They usually include presentations by staff on specific subjects, such as visas or quality assurance and/or the opportunity for English UK member centres to meet local agents. We usually hold four to six of these events in different markets each year.

Our annual China Roadshow is aimed at the juniors' market and is run in cooperation with the British Council. It is the leading annual event for UK English language summer school providers looking to meet high quality Chinese agents.

#### 4.1.4 Inward missions

These missions are designed to offer agents the opportunity to gain direct experience of English language education in the UK, including private language schools, further education colleges, and universities.

English UK organises two to three inward missions each year: in spring (usually May), summer (for those interested in summer programmes) and autumn (usually October).

Through a combination of scheduled meetings with educators, visits to language centres and locations, inward missions help agents develop contacts and build working partnerships with English UK member schools, and ultimately to fulfil the needs of potential students more effectively.

#### 4.1.5 Industry workshops and conferences

English UK sends representatives to industry workshops and conferences each year. These are primarily aimed at allowing us to develop our relationships with agencies in new markets, or new agencies in established markets.

#### 4.1.5 Partner Agency Scheme

The English UK Partner Agency Scheme recognises study abroad agencies and educational consultancies that are successfully promoting English language learning in the UK.

To join the scheme, an agency must demonstrate successful partnerships with a number of member centres, that they are engaged with the work of English UK and adhere to the principles of our agency code of conduct. We currently have 250 partner agencies from 50 countries.

#### 4.1.6 Newsletters and website

English UK produces and circulates a quarterly e-newsletter to 5,000 agency contacts around the world. This newsletter features updates from the ELT and study abroad sectors, as well as articles on life as a language student in the UK.

The English UK website includes a comprehensive 'agents' zone' with information on visas, selling a UK education and details of our agent-focussed events and activities.

### 4.2 The direct channel

English UK's international strategy seeks to support the UK ELT sector by developing direct channel activities to complement our agent-facing portfolio.

This endeavour is a new and important part of our international strategy.

- We will seek to work with the wider sector on a new promotional campaign for the UK ELT sector to be delivered through face-to-face and online interactions and focussed on our tier one priority markets.
- We will leverage established portals with partnership development and collaboration to raise English UK's online profile and to increase digital engagement with potential students, clients and their influencers.
- We will partner with commercial exhibition organisers in priority markets in order to create opportunities for UK ELT providers to meet directly with potential students, clients and their influencers, and to raise the profile of the UK as the world's premier ELT destination.

### 4.3 Partnerships, projects and contracts

English UK's international strategy seeks to support UK ELT by developing relationships with key in-country stakeholders and creating opportunities for teaching centres to form lucrative partnerships and win business.

This is a rapidly growing area of activity and will focus on emerging priority markets.

- We will organise missions and events in priority markets in order to create opportunities for key local stakeholders to meet with UK ELT centres, and to introduce the UK ELT sector to the possibilities presented by new markets and marketing channels.
- English UK recognises that UK ELT providers are increasingly operating outside the UK, developing new teaching centres in partnership with local organisations. We are developing a new International Associate Membership model to bolster our relevance to these teaching centres and to improve the perception of the UK as the ELT educational and commercial partner of choice.
- We will facilitate the development of consortia bids in response to invitations to tender for contracts and projects of larger scope.

### 4.4 Supporting the strategy in action

The delivery of our 'strategy in action' will be supported through the following mechanisms.

#### 4.4.1 Market research and market scoping

- We will improve the measurement of the UK ELT sector's performance by carrying out a review and subsequent improvement of our annual and quarterly 'core group' student data schemes.
- We will undertake two to three new market studies annually, in partnership with the British Council. The reports are a series of comprehensive market studies aiming to provide support for UK ELT centres in recruiting students from overseas markets. They focus on key markets that are vital for the work of accredited ELT institutions. Our aim is to assist the sector in new, emerging and changing markets.
- We will carry out market scoping visits to emerging priority markets in order to ensure that the UK ELT sector and English UK are properly positioned and equipped to take advantage of business opportunities.

#### 4.4.2 Local representation

- We will build a global business development network with local in-country representation and expertise in our tier one priority markets. Local representatives will be tasked with developing direct channel routes in their market and engaging with key stakeholders in order to create business opportunities for the UK ELT sector. They will also support business-to-business activities as necessary.

