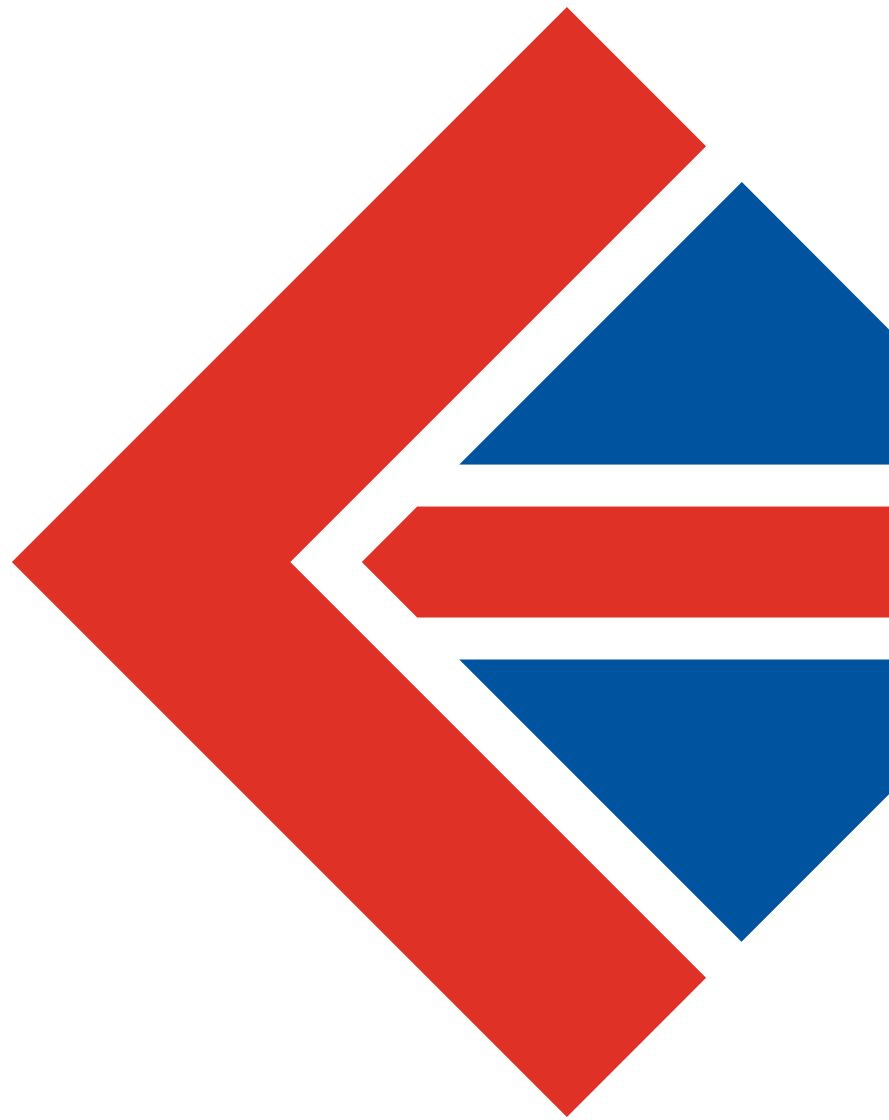


# SOUTHWEST CHINA MARKET REPORT

## MARCH 2008



English UK

# Southwest China Market Report

Visit to Chongqing and Chengdu, March 2008

Jodie Gray  
01/05/08

## CONTENTS

<b>1. Key Facts</b>	Page 3-4
<b>2. Market Background</b>	
<b>a) Overview</b>	Page 4
<b>b) Political and Economic situation</b>	Page 4-5
<b>c) Western Development Strategy</b>	Page 5
<b>d) Internet Users</b>	Page 5-6
<b>3. The Education and Training system in China</b>	
<b>a) Overview</b>	Page 6
<b>b) Primary education</b>	Page 6
<b>c) Junior Middle school (junior high)</b>	Page 6
<b>d) Senior Middle school</b>	Page 6-7
<b>e) Higher Education</b>	Page 7
<b>f) Universities</b>	Page 7
<b>g) Colleges and vocational education</b>	Page 7
<b>4. The English Language Teaching Market</b>	
<b>a) In-country provision</b>	Page 8
<b>b) The current market</b>	Page 8
<b>c) Agents</b>	
i. Chongqing	Page 8-10
ii. Chengdu	Page 10-13
iii. Notes	Page 13-14
<b>d) The British Council and promotion of ELT</b>	Page 14-15
<b>5. Visas</b>	
<b>a) Key Facts</b>	Page 15-16
<b>b) Visa Statistics</b>	Page 15-16
<b>c) Notes</b>	Page 16
<b>6. Summary</b>	Page 16-17
<b>7. Appendix 1 – Approved agencies in Southwest China (provided by the British Council Chongqing)</b>	
<b>8. Appendix 2 - Chongqing Education Market Briefing, British Council Chongqing, March 2008</b>	
<b>9. Appendix 3 – Language Travel Magazine Agency Survey – China (September 2007)</b>	

## 1. KEY FACTS



<b>Area</b>	9.6 million sq km (China) Southwest region covers the provinces of Sichuan, Yunnan and Guizhou and the municipality of Chongqing – around 70% of China’s total land area.
<b>Cities</b>	Beijing (capital city of China), Chongqing, Chengdu (Sichuan), Kunming (Yunnan), Guiyang (Guizhou)
<b>Population</b>	1.3 billion (China-wide)
<b>Age structure</b>	0-14 years: 20.1% 15-64 years: 71.9% 65 years and over: 8% (China-wide)
<b>Literacy rate</b>	90.9% (China-wide)
<b>Languages</b>	Standard Chinese or Mandarin (Putonghua, based on the Beijing dialect) is the official spoken language. Local dialects include Yue (Cantonese), Wu (Shanghaiese), Minbei (Fuzhou), Minnan (Hokkien-Taiwanese), Xiang, Gan and Hakka.

<b>Religions</b>	Daoist (Taoist), Buddhist, Christian 3%-4%, Muslim 1%-2% (officially atheist)
<b>GDP per capita</b>	\$7600 (PPP) (China-wide)
<b>Currency</b>	Renminbi (RMB) – also referred to by the unit yuan (CNY)
<b>Employment</b>	4% in urban areas; substantial unemployment and underemployment in rural areas

## 2. MARKET BACKGROUND

### a. Overview

The Chinese education market is highly fragmented due to the size of the country and the diversity of its population. As such, it should be viewed as several regional markets with differing characteristics, constraints and opportunities. This report gives both general information about China as a whole, and focuses on the Southwest where possible.

Southwest China geographically covers the three provinces of Sichuan, Yunnan and Guizhou as well as the municipality of Chongqing along the upper and middle reaches of the Yangtze River. These four interior subdivisions have a combined population of around 300 million. Official statistics show that there are currently more than 49,000 schools, 8,285,300 students, and a teaching staff population totalling 310,000 in Chongqing.

Chongqing and Chengdu (Sichuan) are the region's main urban centres and primary sources of international students. Kunming (Yunnan) and Guiyang (Guizhou) are smaller, quieter cities, although they are certainly far from being reclusive backwaters. The British Council operates as the Cultural and Education Section of the British Consulate-General (BCG) in Chongqing and the China-Britain Business Council (CBBC) has offices in both Chongqing and Chengdu.

### b. Political and economic situation

The big worry for Chinese authorities remains the possible overheating of the economy, with annual growth persistently in double figures and inflation hitting a ten year high in late 2007. Interest rates have already increased and new measures introduced to slow the growth of bank lending and curb price rises.

Not everyone in China has enjoyed greater prosperity in recent years, it is estimated that 20% of the population is responsible for 50% of consumption whereas the poorest 20% are responsible for less than 5% of consumption. Nevertheless, many Chinese living in urban areas are now able to afford consumer durables, cars and personal computers – at an estimated 220 million as of February 2008, the number able to access the Internet has now surpassed that in the USA.

According to the China Brand Strategy Association, about 175 million Chinese people, 13% of the population, can now afford high-end luxury goods. By 2010, that number is estimated to reach 250 million, based on a 20% year-on-year growth rate expected for the coming five years.

While the growing gap between rich and poor is extremely prevalent in the Southwest, particularly between urban and rural communities, there is also a vast disparity between incomes in China's poorer west and wealthier east. China's GDP per capita is US\$7600 (PPP), US\$2001 (nominal); however, the wealth is very much concentrated on the east coast. Covering over 70% of China's landmass, the western reaches of the country sees less than 17% of the total economic output. The Chinese government is seeking to rectify this imbalance through the Western Development Strategy (WDS), which was officially unveiled in 2000.

China is now a member of the World Trade Organisation and further economic liberalisation is expected in the coming years. Global Insight estimates that on current growth projections China will be the world's largest single economy by 2050. China is already the world's largest consumer of grain, meat, coal and steel and is now the world's fifth largest exporter of merchandise. In the near-term, the IMF forecast that in 2008 China's economy will expand by 10%.

The government continues to say that it wants to target the benefits of economic growth away from the relatively well-off urban populations to help the poorer rural regions. Latest projections suggest that by 2030 60% of China's population will be living in urban areas compared to around 40% at present. The eyes of the world will be on China, and in particular Beijing in 2008 as the city hosts the Olympic and Paralympic Games.

### **c. Western development strategy**

The Southwest's growing strategic importance in the Chinese economy is the focus of China's Western Development Strategy (WDS). This policy initiative delivers on the Chinese Government's long-term commitment to accelerating the capacity building of the less-developed regional economies in Western China through implementing a comprehensive blueprint involving substantial infrastructure expenditures and a series of tax incentives to attract inward domestic and foreign investment. WDS also encompasses a prominent education component to significantly upgrade Western China's educational capabilities and infrastructure.

The preliminary evaluation of the policy is encouraging. In recent years, the gap in GDP per capita has shown some signs of closing and in 2005/2006, three-quarters of the western provinces experienced higher growth than the majority of coastal provinces. This reinforces Southwest China's position as a promising untapped market for UK ELT providers.

### **d. Internet users**

- ETC New Media Review ([www.etcnewmedia.com/review](http://www.etcnewmedia.com/review)) has a wealth of further facts and figures on internet usage in China. Some highlights from that and other sources and included here:
- The number of Chinese on the Internet reached more than 220 million as of February, according to estimates from official Chinese statistics by the Beijing-based research group BDA China. The government is likely to confirm the leap at its half-yearly report in July.
- The long-time Internet leader, the USA, which founded and developed the network of computers, had 216 million users at the end of 2007, according to Nielsen/NetRatings.
- The percentage of American users — 71% — still exceeds China's 17%. China has 1.3 billion people, compared with nearly 304 million in the USA.
- China Internet Network Information Centre (CNNIC) figures show that Chinese internet users closely resemble users around the world – they check email (56.1%), read the news (53.5%) and search for information (51.5%) and acquire information (41.0%) (Source: eMarketer, February 2007).
- However, according to a 2006 OfCom/Synovate study, Chinese broadband-users are more likely than those in other countries to engage in a range of social networking/Web 2.0 activities and consume user-generated content
- For example, in China 58% of all purchase decisions were influenced by user-generated content such as consumer reviews and rating sites, forums and discussion boards, blogs and other UGC. In the US, only 19% of purchase decisions were influenced by user-generated content. Search engines

were still more influential, according to the study. Among Chinese broadband users, 46% used a search engine to make purchase decisions, compared with 25% of US broadband users. (Source: eMarketer, March 2008).

- Until a couple of years back, the profile of a Chinese consumer was mainly described as one who needed assurances for transactions online and preferred paying in cash. However, major changes are now being witnessed in the online booking and buying process and it is acknowledged that the Chinese economy and the Chinese consumer are evolving towards maturity. Offline bookings still account for the lion's share in China, but online transactions are growing quickly, as is the readiness of Chinese consumers to use credit cards. (Source: EyeForTravel, August 2007).
- Nevertheless, progress in the area of e-commerce will be relatively slow. In 2006, 20 million Chinese Internet users had made at least one purchase online within the past year, according to iResearch. That is a 15% penetration rate. By 2010, the penetration rate will increase to 28%. By comparison, in 2006 the US penetration rate for online buyers ages 14 and older was 66%.

### 3. THE EDUCATION AND TRAINING SYSTEM IN CHINA

#### a) **Overview**

<u>Age</u>	<u>Education</u>	<u>Compulsory</u>
18-22	University or college	No
15-18	Senior middle school or vocational school	No
12-15	Junior middle school	Yes
6-12	Primary school	Yes

#### b) **Primary education**

- 6 years
- Students start learning English in their 3<sup>rd</sup> year (in their 1<sup>st</sup> year in Beijing)

#### c) **Junior Middle school (junior high)**

- 3 years
- At the end of their final year all students take an examination. If successful this leads to senior middle school or vocational school. These examinations are considered to be very important as the pass level determines the quality of senior or vocational school into which the students may be accepted.

#### d) **Senior Middle school**

- 3 years
- Students elect whether to follow a science or humanities curricula. These courses are designed to lead to the important National College Entrance Exam (Gao Kao).

#### e) **Higher Education**

The National College Entrance Examination (Gao Kao) is an academic examination held annually and is almost always required for entry to higher education colleges and universities. The exam is held in June and there are separate strands for science and humanities candidates. Three subjects are mandatory for almost everyone: Chinese, Mathematics and a foreign language - usually English. University and College admission is administered nationally and by admissions committees at provincial level, under the Ministry

of Education. Students apply for the institution and departments they wish to attend, listing choices in order of preference.

#### **f) Universities**

There are literally hundreds of universities in China, but these vary immensely in the level and quality of education provision. At the top of the pecking order are the key universities such as Beijing University and Shanghai's Fudan University. Below these are various provincial and local institutions. Somewhat confusingly, there are also a large number of "normal" universities. These are focused on teacher training.

Most universities offer four to five year courses leading to bachelor's degrees. It is also possible to continue to master's and doctorate level on passing additional entrance exams. All students study English regardless of their choice of major.

The government has made major investments in the development of the post-secondary education system within China, wanting to make Chinese universities among the best in the world within the next decade. Chinese universities are partnering with foreign universities, particularly English-speaking institutions, to increase their capacity. The opportunity for foreign institutions is changing from one based on attracting students to study abroad to the delivery of programmes in China.

Up to 2007, 9 international cooperative projects had been established in Chongqing, enrolling a total of 3544 students and producing 536 new graduates to date.

#### **g) Colleges and vocational education**

In addition to the universities, there are colleges, offering two or three year diploma courses in various vocational subjects. There are also 'normal colleges', which again are teacher training establishments.

The rapidly expanding economy means an increased demand for skilled workers and to help meet this demand, the Chinese government has prioritised vocational education and training (VET) in its current Five Year Plan. Moreover, it is actively promoting vocational education to parents and young people. These developments are attracting UK VET providers into the Chinese educational arena. The sheer size of the market makes investment an attractive proposition.

Under China's 11th five year plan, the government aims to establish a learning society, with further education and adult education of various forms witnessing more development. In order to meet the urgent demand for qualified labours and skilful workers required by the growing economy, employment and service oriented models of vocational education are being established.

The government has set out to increase enrolment rate into vocational education and training higher institutions to be more than 50 per cent of enrolment at higher education, which currently stands at around 5.4 million new students annually.

In addition, the government aims to build over 1,000 vocational education centres, 1,000 exemplary secondary vocational schools, as well as 100 exemplary senior vocational schools to further expand the scale of vocation education and training. CNY 10 billion has been put in place to support the construction of vocational training bases, teaching facilities and also for the provision of student aid in vocational education and training.

The Chinese government is therefore actively encouraging students to undertake and enrol in vocational courses that are practical and relevant to meet with growing industry needs. (Source: Cultural and Education Section of the British Embassy Beijing)

#### 4. THE ENGLISH LANGUAGE TEACHING MARKET

##### a) **In-country provision**

Learning English in China is hugely popular, especially with the 2008 Beijing Olympics around the corner - the Beijing English testing System (BETS), an exam especially designed for English proficiency of Beijing residents, will be conducted for the first time in 2007.

The extent of English learning was also highlighted in a 2006 article by Zhang Rui – ‘The Business of English’ (China Internet Information Centre, www.china.org.cn, January 10 2006) – which reported that on December 24 2005 some 5.3 million Chinese students sat for the College English Test (CET), Bands 4 and 6. This is a strong measure of the popularity of learning English in China. These tests are the most influential of the various English proficiency tests administered by the Ministry of Education and some universities insist that students must pass at a certain level before graduating.

The private ELT sector is flourishing in China, with independent schools, branches of multi-national and domestic chains and private tutors doing business in every town and city. Ambitious parents, a hugely competitive exam results-orientated and over-subscribed education system and worries about graduate unemployment have made after-school tuition the norm. It is common for middle school students to attend extra private classes in many of their school subjects.

##### b) **The current market**

	<b>2004 (base 243)</b>	<b>2005 (base 249)</b>	<b>2006 (base 262)</b>
<b>Market position</b>	<b>4</b>	<b>7</b>	<b>10</b>
<b>% of total UK ELT market</b>	<b>8.00</b>	<b>5.32</b>	<b>4.30</b>
<b>Student weeks</b>	<b>99,506</b>	<b>66,769</b>	<b>61,776</b>

- In 2007, according to statistics from the Chongqing Education Committee, 2008 students went abroad for study, among which 277 went to the UK. In addition, 827 students travelled overseas as summer school students (America 500, UK 36, France and Germany 120 and Japan 109). However, according to the Visa Section at the British Consulate-General (BCG) Chongqing, 800 students from SW China travelled to the UK for summer schools, among which 30% were from Chongqing. (Source: Chongqing Education Market Briefing, Cultural and Education Section of the BCG, March 2008)
- The top three competitors for overseas study in the Chongqing market are the USA, UK and Australia. (Source: Chongqing Education Market Briefing, Cultural and Education Section of the BCG, March 2008)
- According to Terry Wang of the British Council Chongqing, Chengdu is the centre of the study abroad market in SW China.

##### c) **Agents**

###### i. **Chongqing**

There are 7 government approved agencies based in Chongqing. From among these, 5 were able to attend the briefing session.

<b>Agency</b>	<b>Representative</b>	<b>Contact details</b>	<b>Comments</b>
<b>Chongqing Can-Achieve Consultants Co. Ltd</b>	'Kenny' Liu Jun, Vice General Manager	Room 1, 32/D Shidai Hao Yuan, Qingnian Road No. 7, Yuzhong District, Chongqing 400010  T +86 23 63808891 M +86 1367814200 F +86 23 63808893  <a href="http://www.canachieve.co.cn">www.canachieve.co.cn</a> <a href="mailto:kennyliu@canachieve.com.cn">kennyliu@canachieve.com.cn</a>	Primarily interested in foundation courses. Has already visited several universities in the UK. Est. 1994 20 employees
<b>Kaplan ACE Education (formerly ACE Educational Management Co. Ltd)</b>	'Victor' Liang Ye, Student Service Consultant	International Department Chongqing No. 1 Middle School, International Foundation Year Programme, No. 2 Shan'an Street, Shapingba District, Chongqing, 400030  T +86 23 65414213 M +86 15923354931 F +86 23 65422255  <a href="http://www.ace-edu.com">www.ace-edu.com</a> <a href="mailto:victorye@ace-edu.com">victorye@ace-edu.com</a>	Organises (NCUK) foundation programmes in SW China, but these are always over-subscribed. Keen to work with member centres to offer alternative foundation programmes to those students who are unable to enrol on their programmes in China. Est. 2001 40 employees in Chongqing – other offices across China
<b>UKEAS Chongqing</b>	'Michael' Cheng Chunguang, Senior Consultant	Room 1108, Metropolitan Tower, No. 68 ZouRong Road, Central District, Chongqing 400010  T +86 23 63806660 F +86 23 63806556  <a href="http://www.ukeas.com.cn">www.ukeas.com.cn</a> <a href="mailto:michael_cheng@ukeas.com.cn">michael_cheng@ukeas.com.cn</a> , <a href="mailto:chongqing@ukeas.com.cn">chongqing@ukeas.com.cn</a>	UKEAS is based in Taiwan. Currently deals mostly with students looking for post-graduate courses in the UK, but also interested in pre-Masters' and short courses. Possibly also looking to expand into working with providers of high school programmes. Organises an exhibition in Chongqing in March. Keen to work with English UK members.

			Est. 1998 50 employees (excluding UKEAS Taiwan)
<b>Service Center for Studying Abroad of Southwest University</b>	Shi Yu, Consultant	1912A Room, Metropolitan Tower, No. 68 Zourong Road, Central District, Chongqing 400010  T +86 23 63823588 M +86 13983852065 F +86 23 63710005  <a href="mailto:sara_hsy@hotmail.com">sara_hsy@hotmail.com</a>	Expressed interest in working with a range of providers. Est. 2001
<b>Solton Overseas Development Co.</b>	'Cissy' Nie Ying, Manager of Consulting	12/F Peninsular International Building, No. 50 Zourong Road, Yuzhong District, Chongqing 400010  T +86 23 89030000 F +86 23 89034444  <a href="http://www.suotong.com.cn">www.suotong.com.cn</a> <a href="mailto:solton@21cn.net">solton@21cn.net</a>	Works with a broad range of providers from boarding schools to universities. Keen to hear from English UK members. Organises exhibition/fair in Chongqing and Chengdu in December. Est. 1993

Other approved agencies based in Chongqing:

Agency	Representative	Contact details
<b>Chongqing Yujiao Service Center for Scholarly Exchange</b>	Tan Xianyin	T +86 23 63885011 F +86 23 63885011  <a href="http://www.yscse.com">www.yscse.com</a> <a href="mailto:liuxue@yscse.com">liuxue@yscse.com</a>
<b>Chongqing Rite International Business Consultants Co. Ltd</b>	Lu Xue	Room 1008-1009, 10/F GuoMao Center, No. 38 Qingnian Road, Yuzhong District, Chongqing  T +86 23 63722918 F +86 23 63832738  <a href="http://www.cqrite.net">www.cqrite.net</a> <a href="mailto:cqrite@vip.163.com">cqrite@vip.163.com</a>

ii. Chengdu

There are 11 government approved agencies in Chengdu. From among these, 8 were able to attend the briefing session.

Agency	Representative	Contact details	Comments
<b>Sichuan Service Centre For Scholarly Exchange</b>	'Stella' Bei Li, Vice General Manager & 'Memory' Wenyi Mo, Project Manager	No. 8 Xi Yu Street, A-26-A, Xi Yu Building, Chengdu, Sichuan 610015  T +86 28 86139696 F +86 28 86138673  <a href="http://www.sc-studyabroad.com">www.sc-studyabroad.com</a> <a href="mailto:memorymo@hotmail.com">memorymo@hotmail.com</a> <a href="mailto:stellalee56@hotmail.com">stellalee56@hotmail.com</a>	Est. 1998 20 employees  Keen to work with a broad range of providers. Interested in short courses, foundation programmes and high/boarding schools.
<b>Chengdu Accor Going Abroad Consulting Co. Ltd.</b>	Jessie Xiang, Consulting Manager & Princess Cai, Chief Application Consultant & Ellen Hu, Assistant Consultant	27F New Times Plaza, No. 42 Wenwu Street, Xinhua Avenue, Chengdu, Sichuan 610016  T +86 28 86784222 F +86 28 86613019  <a href="http://www.accorgoing.com">www.accorgoing.com</a> <a href="mailto:princesscai@accorgoing.com">princesscai@accorgoing.com</a> <a href="mailto:ellenhu@accorgoing.com">ellenhu@accorgoing.com</a>	Est. 2002 20 employees  Keen to work with a wide range of providers. Broad portfolio. Has previously attended Education UK Exhibition in Chongqing in order to meet UK institutions.
<b>Chengdu Starglory Overseas Service Co.,Ltd (Shinyway International)</b>	'Jennine' Jia Xie, Studying Abroad Assistant	26F Chuanxin Mansion, No. 18, Sec. 2 South Renmin Road, Chengdu, Sichuan 610016  T +86 28 66022066 F +86 28 86199578  <a href="http://www.starglory.com">www.starglory.com</a> <a href="http://www.igo.com">www.igo.com</a> <a href="mailto:jenninexie@shinyway.com.cn">jenninexie@shinyway.com.cn</a> <a href="mailto:chengdu@shinyway.com.cn">chengdu@shinyway.com.cn</a>	Est. 1996 Offices in 8 Chinese cities. Broad portfolio.
<b>Chengdu Can-Achieve Consultants Ltd.</b>	Sissi Zhang, Studying Abroad Manager	27E, No. 42 Wenwu Road, Qingyang District, Chengdu, Sichuan  T +86 28 86202349 F +86 28 86780768  <a href="http://www.canachieve.com.cn">www.canachieve.com.cn</a> <a href="mailto:chengdu@canachieve.com.cn">chengdu@canachieve.com.cn</a>	
<b>Kaplan-ACE, Chengdu (formerly ACE Educational)</b>	Kelly Zhu, Executive Assistant & Echo Zhang, Course Leader	Floor 3, Library International Foundation Year (IFY) Centre, No. 7 Middle School,	See comments above for Kaplan-ACE Chongqing.

<b>Management Co., Ltd)</b>		Chengdu, Sichuan 610041 T +86 28 66879774 F +86 28 66879770  www. <a href="mailto:kellyzhu@ace-edu.com">kellyzhu@ace-edu.com</a> <a href="mailto:echozhang@ace-edu.com">echozhang@ace-edu.com</a>	Est. 1999 50 employees in Chengdu NCUK centre
<b>Sichuan Dipont Visa Information Service Co.,Ltd</b>	Lu Gao, Consultant & Jiang Yaqin	Room 1606, World Trading Centre A, No. 117, Gulou Nan Jie, Chengdu, Sichuan  T +86 28 86618928 F +86 28 86757127  <a href="http://www.dipont.com">www.dipont.com</a> <a href="mailto:jygseven@dipont.com">jygseven@dipont.com</a>	
<b>Sichuan Foreign Agency Service</b>	'Ripple' Chen Yi, Representative of the Outbound Department	No. 1-25, Changke Road, Chengdu, Sichuan 610041  T +86 28 8523 5241 F +86 28 8523 5241  <a href="http://www.scfao.com">www.scfao.com</a> <a href="mailto:dcba1489@sina.com">dcba1489@sina.com</a>	Est. 1985
<b>Chengdu Sunshine International Service Co.,Ltd</b>	Wanli Zhang, Marketing Manager & Tingting Zhan, Chief of the UK Department	No.19 Xihuan Men Jie, Chengdu, Sichuan  T +86 28 86635280 F +86 28 86242732  <a href="http://www.cdfasc.org.cn">www.cdfasc.org.cn</a> <a href="mailto:chengdufasc@yahoo.com.cn">chengdufasc@yahoo.com.cn</a>	Broad portfolio. Wide range of activities in field of cultural/scholarly exchange.

Other approved agencies based in Chengdu:

<b>Agency</b>	<b>Representative</b>	<b>Contact details</b>
<b>Sichuan Overseas Affairs Service Centre Co., Ltd.</b>	Zhang Lihua & Tao Jin	Room G, 17/F Guodong Square, No. 52 Ji Dun Road, Chengdu, Sichuan  T +86 28 86157027 F +86 28 86159788  <a href="http://www.oasc.org.cn">www.oasc.org.cn</a> <a href="mailto:kathyzh@hotmail.com">kathyzh@hotmail.com</a>
<b>Sichuan Sino Light Cultural Educational Exchange Co., Ltd</b>	Fu Jie	4/F Xingzheng Building, No. 10 Renmin Beilu Yi Duan, Chengdu,

---

Sichuan

T +86 28 83418288

F + 86 28 83418288

[www.sc-huangguang.com](http://www.sc-huangguang.com)

[hgfuji@yahoo.com.cn](mailto:hgfuji@yahoo.com.cn)

**Chengdu Huaying Consulting  
and Service Limited Liability  
Company for Personnel Going  
Abroad**

Ren Ran

A1119, 11/F Golden Hawaii, No.  
84, Xi Da Jie, QingYang District,  
Chengdu, Sichuan

T +86 28 86259002

F +86 28 86278427

[www.cdhuaying.com](http://www.cdhuaying.com)

[market\\_2@cdhuaying.com](mailto:market_2@cdhuaying.com)

**See Appendix 1 for a full list of approved agencies in Southwest China, including their names and addresses in Chinese.**

**iii. Notes**

- The briefing session in Chongqing was held at the Harbour Plaza Hotel on Tuesday 4 March 2008 and was followed by a buffet lunch.
- The briefing session in Chengdu was held at the office of the China-Britain Business Council on Thursday 6 March 2008 and was followed by a buffet lunch at the Haiyatt Garden Hotel.
- Of the agents in attendance, all were aware of the British Council and had worked with the Chongqing office in some capacity in the past.
- Few of the agents had much prior knowledge of English UK and the Accreditation UK scheme, but certainly seemed keen to find out more and to encourage more UK institutions to visit SW China in the future.
- Several agents organise their own exhibitions/student fairs and regularly carry out school visits – they would be happy to invite UK institutions to attend.
- A number of agents were engaged in both sending students abroad and running their own in-country foundation programmes (e.g. Kaplan-ACE runs NCUK Centres). They suggested that there is room in the market for UK-based foundation courses providers, as these in-country centres are always hugely over-subscribed and many students are turned away, either to wait for the next intake, or to enrol at a Chinese university (admission to the best universities is highly competitive and many students will not be successful in enrolling at their number 1 choice).
- Overall, agents were positive about the future impact of the Student visitor visa route and saw potential for the growth of the market for short English language courses. However, when asked for their opinions on the results of the Language Travel Magazine Agency Survey, September 2007 (see Appendix 3) indicating that the most popular course in the Chinese language travel market is 'academic preparation', all agreed and commented that most students will not go overseas for English study alone and are looking for 'added value'.

- Agents who attended the briefing sessions indicated that their previous experience mostly lay in placing students in summer schools, academic preparation courses, international boarding schools/high schools and higher education institutions (undergraduate and postgraduate).
- Several agents suggested that there is a gap in the market for a short masters' preparation course, which is not as costly or comprehensive as the current pre-masters' programmes available. Such a course would be aimed at students who perhaps already have the sufficient grades and language level for admission, but who want to experience life in the UK before committing to a PG degree. The programme of study might cover general English, IELTS preparation for those students who are yet to take the exam, PG study skills, information about what to expect as a student in the UK, visits to university campuses etc.
- All new agents will be invited to complete the New Agent Business Profile form, and once references have been verified, will be placed on our mailing list to receive our quarterly e-newsletter, a copy of the English in the UK guide and details of how to register for StudyWorld London.

#### **d) The British Council and promotion of ELT**

- In China the British Council has diplomatic status and therefore cannot engage in any commercial activities. It is known as the Cultural and Education Section of the British Embassy (Beijing)/British Consulate-General (Shanghai, Guangzhou, Chongqing).
- The Chinese government has made clear its commitment to the improvement of English proficiency in China in order to participate more effectively in world markets and particularly to prepare for the 2008 Beijing Olympics. Children at primary school now start learning English in their third year (in their first year in Beijing). This has led to a huge need for primary English teachers.

To support this massive training need, all four British Council offices on the mainland have been involved in teacher and trainer development courses in conjunction with local partners and delivered by ELT institutions and individuals from the UK. Many of the local teachers and trainers have been sent to the UK for further study and have now become key trainers, not only in their own schools, but also at a local level.

- In September 2007, the British Council launched English Online, a new website for English learners and teachers across China and Hong Kong. Content is delivered to the user based on their learning needs and interests, including practice IELTS materials, as well as material aimed at English Professionals and Chinese Teachers of English.
- British Council China offices have been organising a Summer Schools Programme since 2001, with more than 5,000 students participating in the scheme.
- The British Council in Chongqing has built strategic relationships with 35 agents in SW China (13 in Chongqing, 15 in Sichuan, 6 in Yunnan and 1 in Guizhou - see Appendix 1) and has signed memorandums of understanding with 6 other summer school agents.

Medy Wang is the member of staff responsible for handling summer school arrangements - [medy.wang@britishcouncil.org.cn](mailto:medy.wang@britishcouncil.org.cn).

Wu Xinping (Education Office, BC Beijing - [wu.xinping@britishcouncil.org.cn](mailto:wu.xinping@britishcouncil.org.cn)) is the country-wide coordinator for the Summer Schools Programme.

- Sinba Duan is responsible for Education UK Partnership promotion - [sinba.duan@britishcouncil.org.cn](mailto:sinba.duan@britishcouncil.org.cn)
- The British Council in China organises a nationwide conference at the end of each year for study abroad agents. Last year this event was held in Sanya (Hainan Province) and attracted agents from around China, including the SW region.
- The Education UK Exhibition was held in Chongqing on March 6 2008.

## 5. VISAS

### a) **Key facts**

- Chinese students who wish to come to the UK to study on a course of 6 months duration or less should apply for either a Student Visitor visa (no work and no extensions) or a Student visa (work permitted, extension may be granted).
- Chinese students who wish to come to the UK to study on a course of more than 6 months duration must apply for a Student visa (work permitted, extension may be granted).
- VFS Global runs a network of 12 UK Visa Application Centres (UKVAC) across China - <http://www.vfs-uk-cn.com>
- UKVAC performs a number of routine administrative tasks on behalf of the British Embassy, but have no involvement in the visa decision-making process. The range of tasks performed includes receipt and preparation of applications, fee collection, data input and delivery/return to/from from the relevant Embassy or Consulate. They also offer advice and guidance through a dedicated telephone facility charged at 47 RMB/call (unlimited call time). Payment must either be made by international credit card or with a prepaid PIN card purchased online or from a branch of the Shanghai Pudong Development Bank (located in most major cities).
- From 5 March 2008 onwards, UKVAC has introduced an online appointment system for students and student agents (other categories of applicants are currently not able to make pre-scheduled appointments).
- UKVACs in Southwest China:

<b>Chongqing</b>	3U-7,J.W Marriott Hotel International Trade Centre Office, 77 Qing Nian Road,Yu Zhong District,Chongqing 400010 P.R.China	400010
<b>Chengdu</b>	C2, F16, First City Plaza, 308 Shuncheng Avenue, Qingyang District, Chengdu, P.R.China 610017	610017

- UKVACs are also located in Beijing, Wuhan, Shenyang, Jinan, Shanghai, Hangzhou, Nanjing, Guangzhou, Shenzhen and Fuzhou.

### b) **Visa statistics**

- In 2007, 29,202 student applications were received China-wide – an increase of 25% on the previous year. The issue rate was 78%.
- In 2007, Chongqing received 1,254 student applications from SW China – an increase of 23% on the previous year. The issue rate was 86%.
- A monthly breakdown of visa approvals for students from Chongqing Municipality (Source: Chongqing Education Market Briefing, Cultural and Education Section of the BCG, March 2008)

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
2006	8	6	10	9	5	28	49	119	37	2	1	10	265
2007	4	0	7	7	9	30	75	124	27	1	2	10	277

### c) Notes

I was able to discuss study visa issues Terry Wang, Education Marketing Officer, Cultural and Education Section of the BCG Chongqing. Terry used to work in the Visa Section and now plays a key role in communicating with and advising students and agents about the visa application process.

Since last year, all students and student visitor visa applications received at the UKVACs in Chengdu or Chongqing are sent to the British Embassy in Beijing for review and decision. There are 4 Entry Clearance Officers based at the BCG in Chongqing who deal with 'official' applications only.

Since the introduction of biometric data collection (finger-scans and digital photographs) on 25 October 2007, the Cultural and Education Section has received a moderate number of telephone/email queries from worried agents and students. However, these concerns were expected to be alleviated by the March 2008 launch of the online appointment scheduling system for student applications – especially important for those agents making arrangements for groups.

Overall, the introduction of biometrics in SW China has passed with little negative impact as the two UKVACs in Chengdu and Chongqing are well-placed to be convenient for the majority of applicants. The most frequently voiced concern is that the process is overly intrusive, especially for younger students. However, the general consensus among agents and at the Cultural and Education Section is that this worry is not enough to deter serious applicants and that it is just a matter of getting used to the new system.

The Cultural and Education Section in Chongqing holds regular training and briefing sessions for local agents and reports that they generally have a good knowledge about the visa application process and the new Student Visitor route. This additional training certainly seems to be effective, as agents in Chengdu who are not able to attend these sessions appeared to know markedly less about the recent changes to the visa system for students compared to their counterparts in Chongqing.

Nevertheless, agents in both cities were hopeful about the effects of the introduction of the Student Visitor visa on the market for short courses and were quite pragmatic in their approach to the UK's visa system – they do not feel that it represents a real barrier to student recruitment, but rather that it's a matter of fully understanding the procedures involved.

## 6. SUMMARY

The market in Southwest China is small but growing. The Chinese government's Western Development Strategy has succeeded in increasing the overall prosperity of the region and the number of those who can afford an overseas education is increasing.

The local governments in both Chongqing and Chengdu are encouraging and supportive of international exchange. Chongqing is 'twinned' with Wales and the British Council has helped organise a number of initiatives bringing Welsh institutions to the municipality. Chengdu has also launched a programme to improve the spoken English of its residents and billboards around the city can be seen plastered with encouraging slogans.

The number of language travel agents in the Southwest is relatively small, but many of these have been established for a number of years and seem to have much experience of sending students for overseas. The British Council in Chongqing has established a strong relationship with local agents and consequently they are well-informed about the UK as a study abroad destination.

Most of the agents I met indicated that the USA and Australia are the UK's strongest competitors. The strength of the British pound, high prices, the weather and the perceived unfriendliness of the British people were cited as reasons why students sometimes shy away from studying in the UK. The USA is seen as a good value destination (especially with the current weakness of the dollar) and several agents noted the pervasiveness of US culture (films, TV, retail chains) across China and the opportunity for students to explore such a sizeable country as other reasons for the popularity of an American education. However, agents felt that the difficulties of obtaining a US visa are a major obstacle.

All agents agreed that students often choose to study in Australia as they think that it is easy to get a visa and the country is seen as very welcoming. Just after my visit to China, Kevin Rudd, the Australian PM, delivered a speech in perfect Mandarin in Beijing, talking about the enduring friendship between the two countries and I believe that China has now become Australia's biggest trading partner. Of course, this has all been widely reported in the Chinese media and could be an important factor in the decision-making process of prospective students/parents, especially given the recent outbreak of so-called 'anti-Chinese' sentiment in the UK.

The market in the Southwest is similar to other regions in China in terms of courses in demand. Where it differs is in its size and the level of competition faced by institutions. As the study abroad market becomes increasingly saturated around Beijing, in the coastal regions and around the Pear River Delta (Guangzhou, Shenzhen), there are growing opportunities in Chongqing and Chengdu for institutions willing to 'go west'.

**Appendix 1: Agent list from the Cultural Education Section of the British Consulate-General Chongqing**

City	No	Agency	Agency name in Chinese	Telephone number	Address in Chinese	Zip code
Chongqing(7)	1	Centre for Studying Abroad of Southwest China Normal University The Overseas Education Consulting of Sichuan International Studies University	西南大学自费出国留学服务中心	+86 (0)23 63823555	重庆市渝中区邹容路68号大都会商厦1912室	400010
	2	Chongqing Solton Overseas Development Co.,Ltd.	四川外语学院海外留学服务中心	+86 (0)23 63806660	重庆市渝中区邹容路68号大都会商厦1108室	400010
	3	Chongqing YuJiao Service Center for Scholarly Exchange	重庆索通出国企划有限公司	+86 (0)23 89030000	渝中区邹容路50号半岛国际商务大厦12楼B座	400010
	4	Chongqing Can-Achieve Consultants Co., Ltd.	重庆市渝教出国留学服务中心有限公司	+86 (0)23 89808816	重庆市渝中区中山三路107号希尔顿国际商务酒店611室	400015
	5	Chongqing Asian-European Education & Culture Consultative Co., Ltd.	重庆加成出国咨询服务有限公司	+86 (0)23 6380 2874/6372 8259/6355 4584	重庆市渝中区民生路283号重宾商务大厦25C	400010
	6	ACE Educational Management Co., Ltd. Chongqing Office	重庆亚欧教育文化咨询有限公司	+86 (0)23 65479371/654793 99	重庆市沙坪坝小新街99号立海大厦12F	400030
			成都雅思教育管理有限责任公司重庆办公室	+86 (0)23 65301860	重庆市沙坪坝区沙南街2号 重庆一中逸夫图书楼6楼	400030

**Appendix 1: Agent list from the Cultural Education Section of the British Consulate-General Chongqing**

	Chongqing Rite International Business Consultants Co., Ltd.	重庆瑞潮出国商务咨询有限公司	+86 (0)23 63722918/637229 28/63832718/638 32728	重庆渝中区青年路38号国贸中心十楼1008-1009室	400010
Sichuan(11)	Sichuan Service Centre for Scholarly Exchange	四川省留学服务中心	+86 (0)28 86139696	四川省成都市西御街8号西御饭店A-26	610000
	Sichuan Overseas Affairs Service Centre Co., Ltd	四川省出入境服务中心有限公司	+86 (0)28 8615 7000/8615 7018	成都市金盾路52号国栋广场17楼G座	610041
	Sichuan Dipont Visa Information Service Co., Ltd.	四川省狄邦出国事务服务有限公司	+86 (0)28 86618928/865104 84	四川省成都市鼓楼南街117号世界贸易中心A座1601室	610016
	Sichuan Sino Light Cultural Educational Exchange Co., Ltd	四川华光文化教育交流有限公司	028-83413431	四川省成都市人民北路一段10号西藏饭店行政楼四楼	610081
	Chengdu Huaying Consulting and Service Limited Liability Company for Personnel Going Abroad	成都华樱出国服务有限责任公司	86 28 86259002	四川省成都市青羊区西大街84号金色夏威夷1层A1119	610043
	ACE Educational Management Co., Ltd.	成都雅思教育管理有限责任公司	+86 (0)28 85411111Ext621	四川大学望江校区(东区)第四教学楼公共管理学院ACE国际中心三楼	610064
	Chengdu Starglory Overseas Service Co., Ltd.	成都星华出国服务有限公司	+86 (0)28 85451015	成都市武侯区致民路36号锦江新园901-902室	610021

**Appendix 1: Agent list from the Cultural Education Section of the British Consulate-General Chongqing**

	Chengdu Accor Going Abroad 8 Consulting Co., Ltd.	成都雅高出国顾问有限公司	+86 (0)28 86784222	成都新华大道文武路42号新时代广场27楼	610016
	Chengdu Can- Achieve 9 Consultants Ltd.	成都加成顾问有限公司	+86 (0)28 86181833	成都市青羊区文武路42号27楼E单元	610017
	Chengdu Sunshine International 10 Service Co. Ltd	成都顺欣国际服务有限公司	+86 (0)28 86635260/866352 65	成都市西华门街19号	610015
	Sichuan Foreign 11 Agency Service	四川省外国机构服务处	+86 (0)28 85231232/8523 5241	成都市人民南路四段成科路一号	610041
Yunnan (4)	Chinese Service Centre for Scholarly Exchange, Yunnan 1 Branch	云南省留学服务中心	+86 (0)871 5124276/5126012	云南昆明市学府路2号教委大楼	650033
	Yunnan University International 2 Service	云南大学国际交流事务所	+86 (0)871 5034273/1375955 2522	昆明市翠湖北路2号云南大学科学馆429室	650091
	Kunming H&T International Information for Scholarly Exchange 3 Co., Ltd.	昆明衡泰人才交流信息有限公司	+86 (0)871 3159246/3159259	昆明市青年路448号华尔顿大厦14层	650021
	Yunnan Kingway Consulting Service 4 Co., Ltd	昆明经纬出国留学服务有限公司	+86 (0)871 3632099	中国云南省昆明市南屏街88号世纪广场C2栋 7楼E、F座	650011

**Appendix 1: Agent list from the Cultural Education Section of the British Consulate-General Chongqing**

			+86 (0)851		
			5808258 Ext. 609		
	Guizhou Overseas		/ +86		
<u>Guizhou (1)</u>	<u>1 Study Service</u>	<u>贵州省出国留学服务中心</u>	<u>13600429219</u>	<u>贵州省贵阳市中华南路93号远通大厦23楼</u>	<u>550002</u>

## Chongqing Education Market Briefing March 2008

### 1. Chongqing Economic and Social updates

#### 1. Overview

Chongqing's vision is to build the municipality into the economic centre of the Upper Reaches of Yangtze River. The municipal government defined four pillar industries to promote, namely automotive, equipment manufacturing, natural resource processing and high tech. Chongqing is the largest motorcycle and the third largest car manufacturer in China. The automotive industry is currently the single most important industry for the municipality. As an old industrial base and a region rich in natural resources Chongqing has strengths in equipment manufacturing and natural resource processing. Although the municipal government has decided to promote high tech as one of its pillar industries, it is not yet as well developed in Chongqing as elsewhere in China. Chongqing is also focusing strongly on commerce, logistics, tourism, and financial services.

#### 2. The average GDP growth rate was 12%. (See the key economic indicators.)

Indicators	2003	2004	2005	2006	2007
GDP (RMB billion)	225	267*	310	349	411
GDP Growth Rate (%)	11.5	12.2	11.8	12.2	15.6
Fixed Asset Investment (RMB billion)	127	161	201	245	280
Disposable Income per capita-Urban (RMB)	8,090	9,221	10,240	11,570	14622
Pure Income per capita-Rural (RMB)	2,220	2,535	2,785	2,874	3506
Social Consumption (RMB billion)	84	95	110	140	180

### 2 Local Education

#### 1. Local Education overview

Chongqing education is focused on education development, education reform and international cooperative. Chongqing government is keen to promote its education to foreign countries. In 2007, it held Chongqing-Mania Education Exhibition and set up the Mayor's Scholarship to attract more international students. In the meantime, they wanted to recruit more high-profile scholars to work in Chongqing.

#### 2. A comparison for the education statistics of Chongqing

No data available for 2006. (Source: 2007 Annual Report on Development of Chongqing Education)

	2004	2005	2007
<b>Number of HE</b>	36	38	38
<b>Total Enrolment of HE student</b>	357,926	376,100	492,000
<b>NO of PG enrolment</b>	24,263		34,000
<b>No. of Vocational Colleges</b>	32	31	23
<b>No. of Vocational Student</b>	540,203	601,372	622,100
<b>No. of Secondary schools</b>	1,511	1,414	1,373
<b>No. of Secondary Student</b>	1,707,489	1,735,166	1,794,200
<b>No. of Primary schools</b>	10,966	10,409	8,754
<b>No. of Primary School Students</b>	2,718,999	2,609,754	2,523,800

Until 2007, Chongqing has 9 international cooperative projects, with 3544 students enrolled and 536 new graduates.

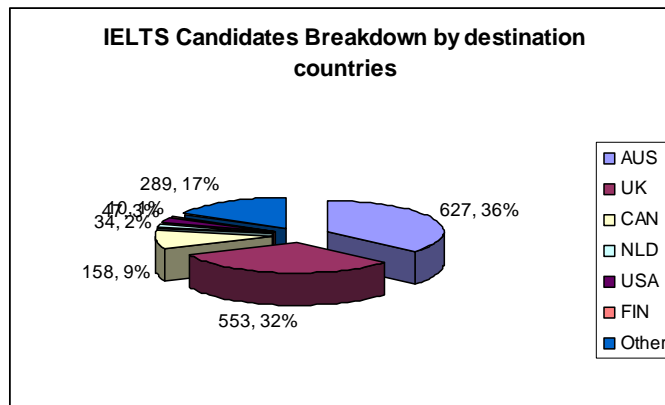
Statistics from Chongqing Education committee shows that 2008 students went to abroad for study, among which 277 went to UK (Visa Section Chongqing Statistics). And 827 students went to foreign countries as

Summer School Students (American 500, UK 36, French and Germany 120, and Japan 109). However, Visa Section indicates that around 800 students from SW China went to UK for summer school, among which 30% were from Chongqing.

There are two international schools in Chongqing which can only recruit expatriate children, they are Yew Chung International School ([www.ycis-cq.com](http://www.ycis-cq.com)) and Chongqing QSI International School.

### 3. International Education

#### 1. IELTS Candidates analysis



(Source: IELTS candidates report of BC Chongqing)

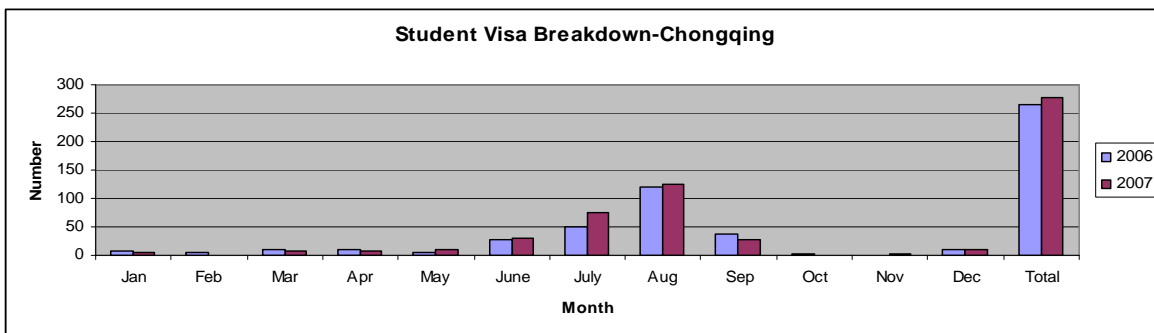
IELTS sees an increase of 29% candidates from Chongqing.

#### 2. Visa Statistics

Statistics from Visa Section shows that in 2007, we totally received 29,202 students application china wide, increase rate is 25%, with issue rate of 78%. Chongqing received 1,254 students application from SW China, increase 23%, with issue rate of 86%.

##### Chongqing Students Visa Approval Breakdown

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
2006	8	6	10	9	5	28	49	119	37	2	1	10	265
2007	4	0	7	7	9	30	75	124	27	1	2	10	277



(Source: Visa Section Chongqing report):

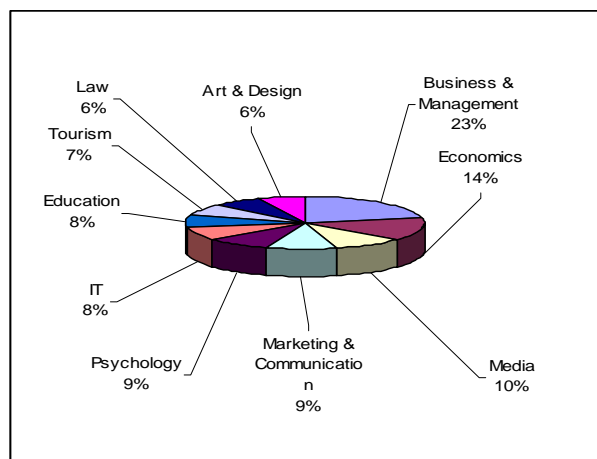
#### 3. Agents

We have built the strategic relationship with 35 agents in SW China, among which 13 agents are located in Chongqing, 15 in Sichuan, 6 in Yunnan and 1 in Guizhou. We are keen to recruit more. We also signed the MoU with 6 other summer school agents.

- The top three players for overseas study for Chongqing Market are USA, UK and Australia.

#### 4. Education Trends

##### Subject preferences:



(Source: Education UK website SW reports until 15/02/2008)

##### Customer Type-Breakdown by Age (Source: Education UK website SW reports until 15/02/2008)

Serial Number	Age	No.	%
1	less than 12	24	0.3%
2	13-17	59	0.9%
3	18-20	743	10.3%
4	21-24	2086	29.1%
5	25-29	2335	32.7%
6	30-34	588	8.2%
7	35-44	359	5.0%
8	45-54	106	1.4%
9	More than 55	497	7.0%
10	DOB empty	83	1.1%

#### 5. Exhibition specific

##### Potential Visitors

It's expected that 2000 visitors will attend the exhibition, which including General public (editorials on newspapers), University students (campus promotion), recent IELTS candidates (IELTS test report form), education UK web site members (e-newsletter), parents, media and agents.

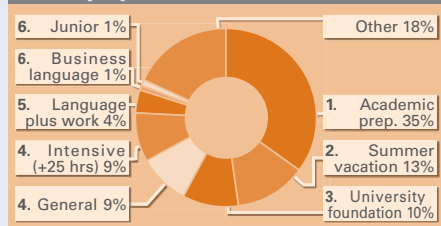
##### Question expected

The quality of the student enquiries is normally very high in this market. Institutions will be asked very specific questions at the exhibition such as scholarships, university ranking, course specific modules, campus life +etc.

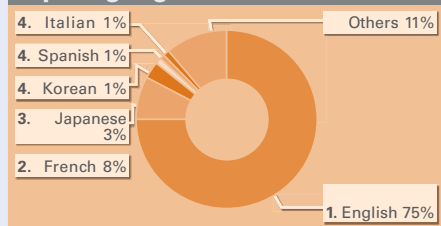
# China soars

Increasing demand for education overseas whipped up momentum in the Chinese language travel market in 2006, and with China's economy on the up it looks likely that this sector will continue to grow in the future.

## Most popular courses



## Top languages

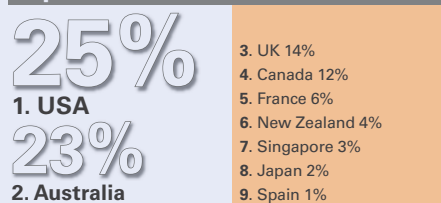


## Economic overview

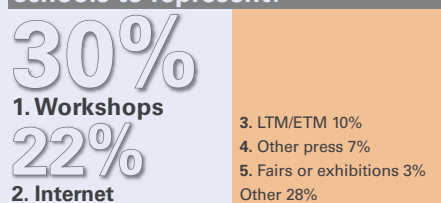
- China's economy has seen double-digit growth for four years and exceeded its eight per cent forecasts in 2006 to reach a record 10.7 per cent.
- The danger of exceeding a growth rate of 11 per cent would be a sudden rise in inflation and overheating of the economy. But economists are optimistic for China's economy in the near future.
- The consumer price index increased by 1.5 per cent in 2006.
- The World Bank revised its forecast for China's GDP growth in 2007 to 10.4 per cent and its projection for the current account surplus to almost 11 per cent of GDP.

Source: Xinhua News Agency; China Development Gateway

## Top destinations



## How do agencies find new schools to represent?



## Market growth

An exponential increase in student weeks was experienced in 2006 by some Chinese language travel agencies, with overall growth across all the 10 businesses that took part in this issue's survey skyrocketing to just over 58 per cent. Looking at individual performances, only one agency reported a decline in student weeks, of 10 per cent – while all the other agencies recorded a growth in student weeks of between five and 300 per cent. The main driving force behind market growth, according to our respondents, was China's healthy economy enabling more students to study overseas.

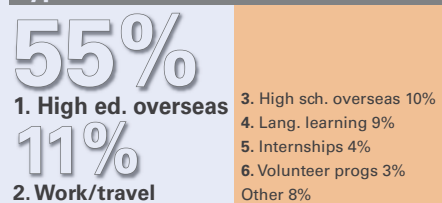
## Language and destination trends

While English remained the most popular language to learn among the Chinese, accounting for 75 per cent of bookings, it is interesting that French was the second-most popular language, making up eight per cent of enrolments. Japanese was in fourth place, followed by Korean. There was a slight change in position among the top destinations this year, with the USA taking the lead in the destinations line-up with 25 per cent, followed by Australia with 23 per cent and the UK with 14 per cent. Last year, the USA trailed in third place, with the UK taking the number-one spot with 39 per cent (see *Language Travel Magazine*, July 2006, pages 14-15).

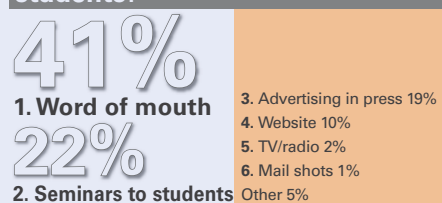
## Student and course trends

The main bulk of agency business is in the academic placement sector, with higher education placements accounting for 55 per cent of client requests overall and a further

## Type of courses



## How do agencies recruit students?



## Key points

- The total number of students placed by the 10 agencies in our survey was **1,323**
- Individual agencies placed between **15** and **250** students on language courses each year
- Average business growth was **58.1 per cent**
- The average length of stay for Chinese students was **23.8 weeks**
- Overall, **51 per cent** of Chinese students stayed with host families when studying overseas
- 84 per cent** of Chinese students took a language course for their further studies overseas
- An average of **55 per cent** of agency clients were seeking higher education opportunities overseas

10 per cent for high school placements. Pure language courses accounted for only nine per cent of business across all the agencies that took part in this survey. This strong trend towards academic education overseas is also reflected in the fact that, according to the agencies, an estimated 82 per cent of clients were learning a language for their further studies overseas. In addition, academic preparation is the most popular type of language training among Chinese students, accounting for 35 per cent of requests, and the average length of stay, at 23.8 weeks, was long.

## Agency business

Personal endorsement from previous students was the most important form of recruitment among Chinese agencies, accounting for an overall 41 per cent of clients. The second-most important recruitment tool was seminars to students, followed by press advertising. For agencies finding new schools to represent, workshops have taken on a greater role, accounting for an overall average of 30 per cent of new partners, compared with 19 per cent last year. Language fairs and expos have become less important when finding new school-partners, resulting in just under three per cent of contacts compared with 20 per cent in 2006.

## Looking ahead

Forecasts for the future of the Chinese market remain upbeat for 2007. One agency said the market would increase "greatly" because of the growing demand for overseas education or for language training for their future career prospects.



# Hand picked from the best English language schools

## United Kingdom

- Anglolang Academy of English, Scarborough
- BEET Language Centre, Bournemouth
- Cambridge Academy of English
- Churchill House, Ramsgate
- Eastbourne School of English
- Eckersley Oxford
- English Language Centre, Brighton and Hove
- Excel English, London
- Frances King School of English, London
- Lake School of English, Oxford
- The Language Project, Bristol
- London School of English, London
- Wimbledon School of English, London

## Ireland

- ATC Language and Travel, Bray
- Cork English College
- The Linguaviva Centre, Dublin

## New Zealand

- Auckland English Academy
- Languages International, Auckland and Christchurch
- Rotorua English Language Academy (RELA)

## Canada

- Access International English Language Centre, Toronto
- Modus Language Institute, Vancouver
- Vancouver English Centre

## South Africa

- Interlink School of Languages, Cape Town

## Malta

- Clubclass
- Global Village English Centre

## Bosnia

- Soros School, Sarajevo

## Poland

- York School, Krakow

## Turkey

- British Side

## Agents can be sure of

- a fast and flexible response
- a strong partnership with the decision-makers
- a commitment to individual service and attention

Become a QE agent  
[agents@quality-english.com](mailto:agents@quality-english.com)



[www.quality-english.com](http://www.quality-english.com)

## Percentage of agents who recognised each of the following organisations

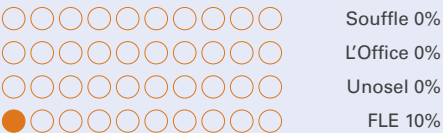
### Australia



### Canada



### France



### Ireland



### Italy



### Malta



### New Zealand



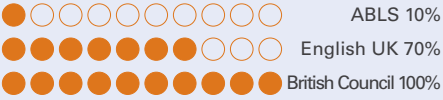
### Portugal



### Spain



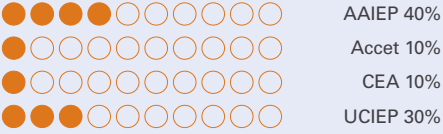
### UK



### Europe



### USA



### International



Chinese agents named a range of language programmes they work with, including, in Australia: Baiwyn High School, Melbourne, VIC; Brighton Secondary School, Melbourne, VIC; Camberwell High School, Melbourne, VIC; Kew High School, Melbourne, VIC; University of Sydney, Sydney, NSW. In Canada: ESL International, Langley, BC; Great Lakes College, Toronto, ONT. In New Zealand: ACG, Auckland; King Education, Christchurch. In the UK: EF, various; Inlingua, Cheltenham; Leeds English School, Leeds; St Andrews, Cambridge; St Giles, various; Twin, London. In the USA: California State University Fullerton ALP, Fullerton, CA; ELS, Princeton, NJ. International: Aspect, various

Thank you to the following agencies for taking part in our survey: Beijing Shiji Huihua Education & Culture Exchange, Fujian Centre for Overseas Studies, Haiyi Co. Heman International Cultural Exchange Centre, Hubei Provincial Foreign Affairs Service Center, Intrinsic Ltd, Sichuan Provincial Huaxing-Abroad Service Company Ltd, Tianjin Jinfu Exit & Entry Consultation Service Center, Zhuk (China) Ltd.



**Registered Office** 219 St John Street London EC1V 4LY

**t** +44 20 7608 7960 | **e** [info@englishuk.com](mailto:info@englishuk.com)  
**f** +44 20 7608 7961 | **w** [www.englishuk.com](http://www.englishuk.com)