

# **Beyond General English: looking for new markets for language centres**

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# Outline

- 1 What is state of General English (GE)?**  
Trends, challenges
- 2 The next billion - potential new markets**  
New countries, New niches, export support
- 3 What is state of state schools overseas?**  
Opportunities & challenges with Ministries
- 4 Diversification approaches**  
Innovate & disrupt, at home & abroad

# 1 - State of GE

- Schools closing
- Enrolments down
- Change in flows – shorter stays, last minute, more demanding expectations
- Tight profits
- Visa regimes
- Commodification
- Cost of living deterrence?
- Accommodation quality deterrence?
- Rich kids only?
- Schools losing out to university language centres?
- Moving to pathways and university entrance?
- Brexit & Trump deterring students?

***Are we doomed?***

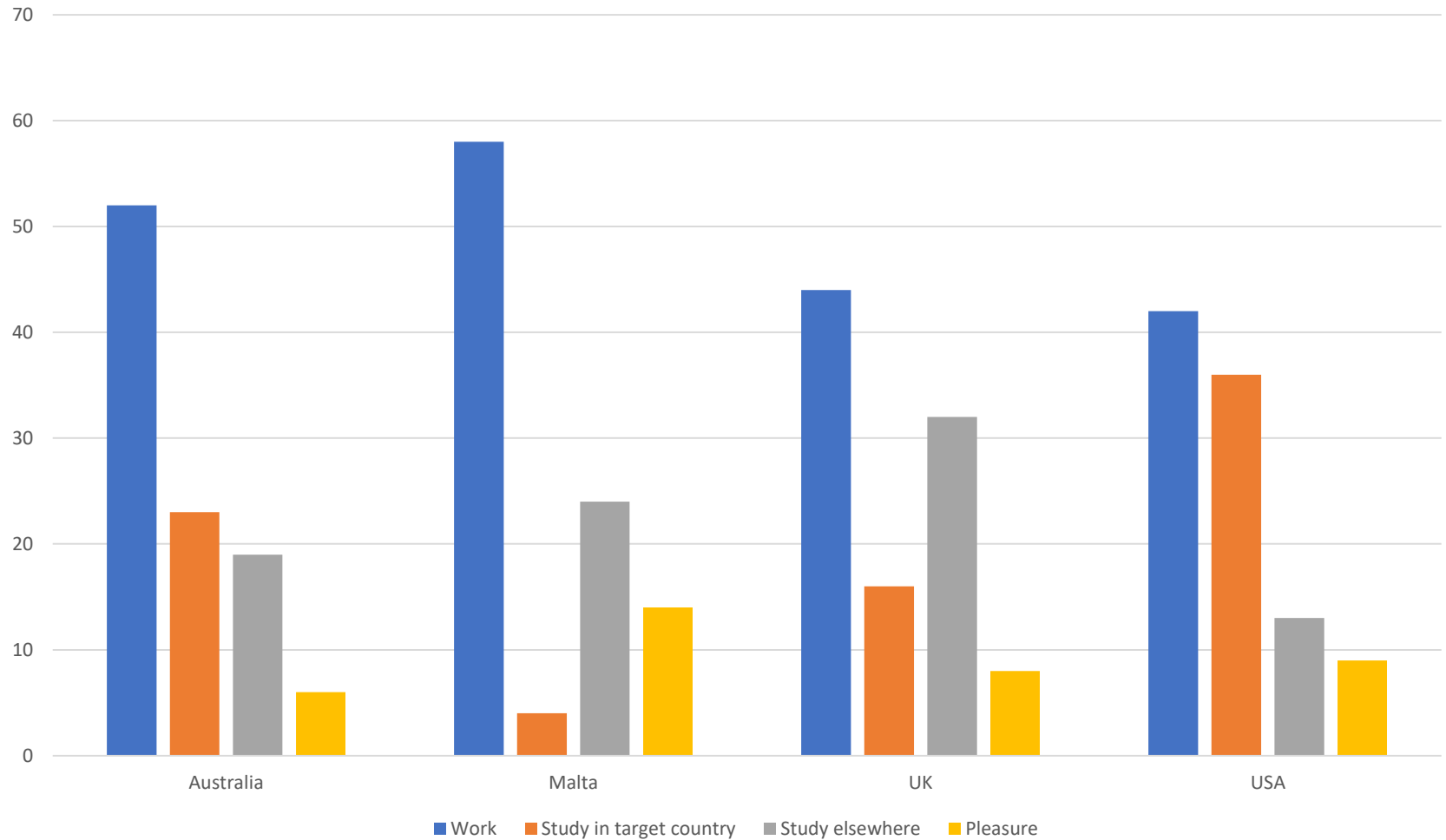


# But ....demand still high

- 1500 million learners of English globally
- ca. 0.5 million come to UK for English each year.  
UK student market is only 0.3% of world demand
- “More than 1m students from 175 countries study in the USA, with over 100,000 on short-term intensive ELT programmes” *EnglishUSA*
- Ca.15m teachers of English globally – ca. 250,000 language school teachers, or 1.6% of global profession

# Why are they here?

Reasons for studying English



# Trends

## *Language policy change*

- Ministry of Education (MOE) decision space
- Reform ambitions
- MTB-MLE
- EMI

A clear driving force has been the push towards language for career development... students want to put the language into 'action'

*Study Travel magazine*

## *Rise of instrumental English*

- Decline of general English: ENPP
- Rise of EMI & other ESPs

English seen to open doors to:

- Education
- Employment
- Mobility

# Trends

## ***Digital disruption – adaptivity***

- Personalisation
- Individualisation
- Adaptive learning
- Adaptive testing
- Meta data profiling
- Auto-grading research

‘Many agents report a rise in demand for higher proficiency language courses’

‘....students seeking shorter and more flexible courses overseas’

## ***The Atlantic wars***

- Growth in market share for US inbound
- Growth of EnglishUSA to over 500+ centres from under 200 10 years ago
- Growth of CELTA in USA (2<sup>nd</sup> largest market)
- Strength of US language variant market
- Impact of Trump & Brexit

# New competitive destinations



"**Italians** still strongly

think that English, the 'true English',



is not the American one, and it has to be studied in the UK if possible.

With wealthier families the story changes quite a lot; these people know what is going on with the English language market and trust to study in Dubai, Philippines, Malaysia because they know that very often the institutions and staff are the same as in Europe or US, sometimes even better.

It is trendy to go to Dubai now"

"**Dominanta** is an agency in Russia. The idea of taking English courses in 'third' countries started forming itself a couple of years ago.....

Now we offer English in our partner schools in Spain because the prices are very attractive, no visa problems and the country is well known to **Russians**, so it helps in marketing programmes like **English on the Beach.**"

**Students First Services**, an agency that recruits from the **Middle East and Africa** told *The PIE News* countries such as India and Malaysia were starting to attract more students because of their lower costs. "They want their children to have a good education that is at the same time affordable, so they consider India to be good" *The PIE News, April 2017*

**Ilyong Bae Yu-Myung Education Agency, Korea**

"In the past, most **Korean** students went to the US, Canada and UK to learn English. Nowadays, the attractiveness of language training in those countries has been lowered.

Students aim for maximum effect at minimum cost, so some students go to Malta, Philippines and Singapore. 15 per cent of my students go to those cheaper countries."



# 2 - The next billion



# Who are the next billion?

## Africa

Middle class doubles by 2030 to  
0.5 – 1 billion

## India

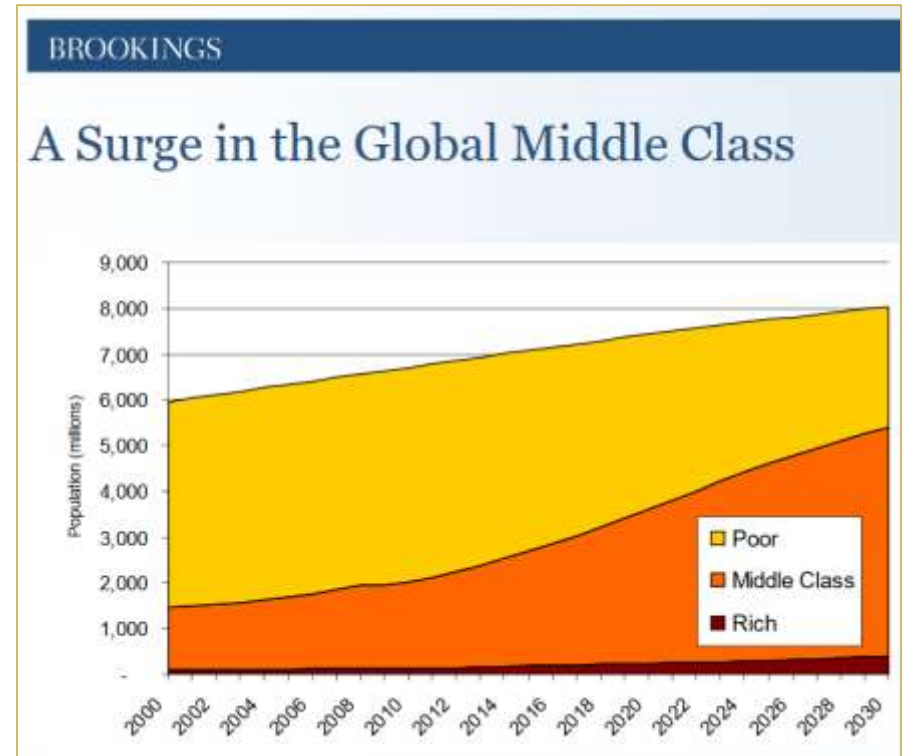
Middle class market bigger than  
USA or China by 2039

## Asia

Middle class doubles by 2030 to  
3.5 billion

## South America

Slower increase in middle class

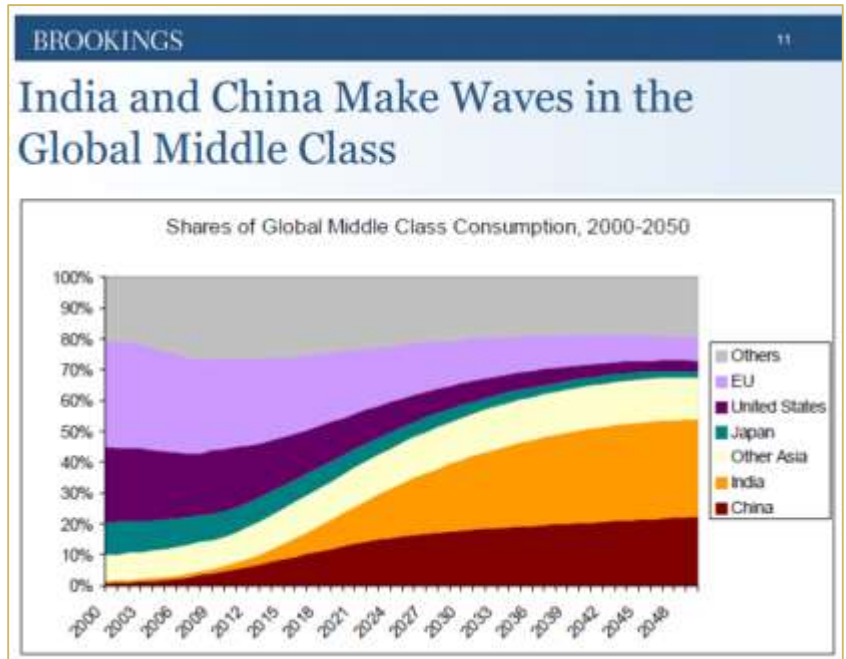


“Over the next two decades, the middle class is expected to expand by another three billion, coming almost exclusively from the emerging world.” *Ernst & Young*

# The emerging middle classes

## *The Top 5:*

- China
- India
- Indonesia
- Nigeria
- Philippines



**Table 2. Number (millions) and share of the global middle class by region**

	2015		2020		2025		2030	
	#	%	#	%	#	%	#	%
North America	335	11	344	9	350	8	354	7
Europe	724	24	736	20	738	16	733	14
Central and South America	285	9	303	8	321	7	335	6
Asia Pacific	1,380	46	2,023	54	2,784	60	3,492	65
Sub-Saharan Africa	114	4	132	4	166	4	212	4
Middle East and North Africa	192	6	228	6	258	6	285	5
World	3,030	100	3,766	100	4,617	100	5,412	100

# English proficiency issues

Both India and Pakistan have large groups of English speaking adults, thanks to the British legacy. But despite the emphasis on English in most schools and the official status enjoyed by the language, these two countries have attained only moderate proficiency overall. *The Hindu*

Thus, it is arguable that proficiency in English is one of the greatest opportunities that the Nigerian education system ought to provide children with. However, this is not the case as too many students, upon completion of secondary school in grade 12, lack the required skills and competencies in the English Language *Olayide Tikolo, Harvard*

EF EPI

THE WORLD'S LARGEST RANKING OF COUNTRIES BY ENGLISH SKILLS

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45 Peru

47 Ecuador

49 Colombia

50 Panama

53 Guatemala

55 Venezuela

63 El Salvador

MIDDLE EAST AND NORTH AFRICA

OVERVIEW

44 Mexico

46 U.A.E.

52 Taiwan

65 Egypt

69 Qatar

81 Iraq

82 Jordan

84 Oman

85 Kuwait

87 Algeria

88 Saudi Arabia

91 Libya

92 Iraq

Sadly, there is no denying that many of today's high school or even college graduates have difficulty in expressing their thoughts clearly and logically in English. *Philippines Inquirer.net*

55.94



PROFICIENCY:

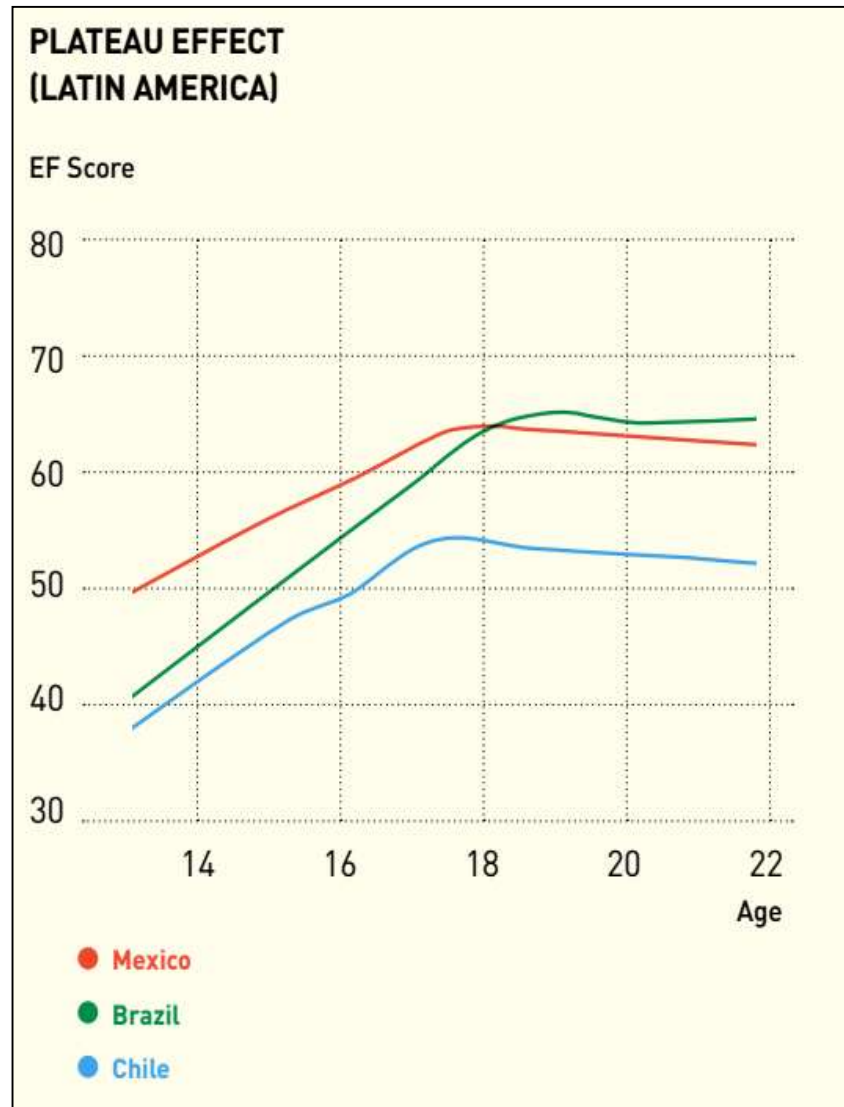
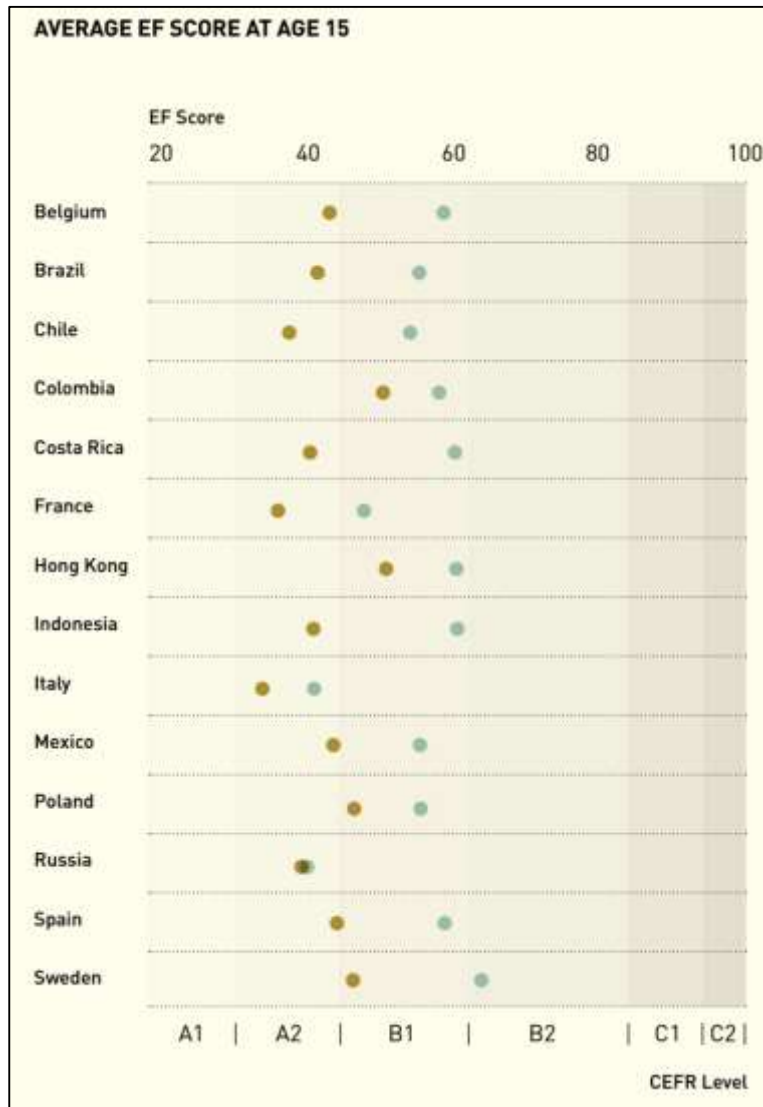


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Singapore	63.52	
Malaysia	60.70	
Philippines	60.33	
India	57.30	
South Korea	54.87	
Hong Kong	54.29	
Vietnam	54.06	
Indonesia	52.94	
Taiwan	52.82	
Japan	51.69	
Macau	51.36	
China	50.94	
Pakistan	48.78	
Kazakhstan	47.42	
Thailand	47.21	
Sri Lanka	46.58	
Mongolia	42.77	
Cambodia	39.48	
Laos	38.45	



# 3 - State of English in state schools



# Challenges in emerging market schools

## ***Lack of reliable access to:***

- School attendance
- Teacher provision
- Teacher quality
- Curriculum quality
- Learning materials
- Classroom technology
- Assessment appropriacy
- High level of outcome
- Info on HE access
- Connectivity

## ***Common deficits:***

- Shortage of teachers
- Shortage of good teachers
- Low language proficiency
- Low salaries / better jobs
- Incomplete training
- Shortage of materials
- Political obstacles
- Mismatch between final assessment and preferred teaching
- Mismatch between secondary exit and tertiary needs
- EMI skills gap in HE

# Causal Issues

## *Ideological issues:*

- MTB-MLE
- EYE
- Digital divide
- ELF
- Linguistic imperialism



## *Funding issues:*

- Insufficient UK capacity building budget for English
- Lack of Aid / NGO support for language learning/teaching
- DFID sees ELT as 'elitist'
- EU (eg GIZ) more supportive
- Dependencies – infra, TT, content, data



# Ministry consultancy

## ***Curriculum***

- Do local needs analysis
- Use the British Council–EAQUALS inventory as basis
- Match to local language policy
- Tailor-make curriculum goals & sequence
- Develop detailed schemes of work

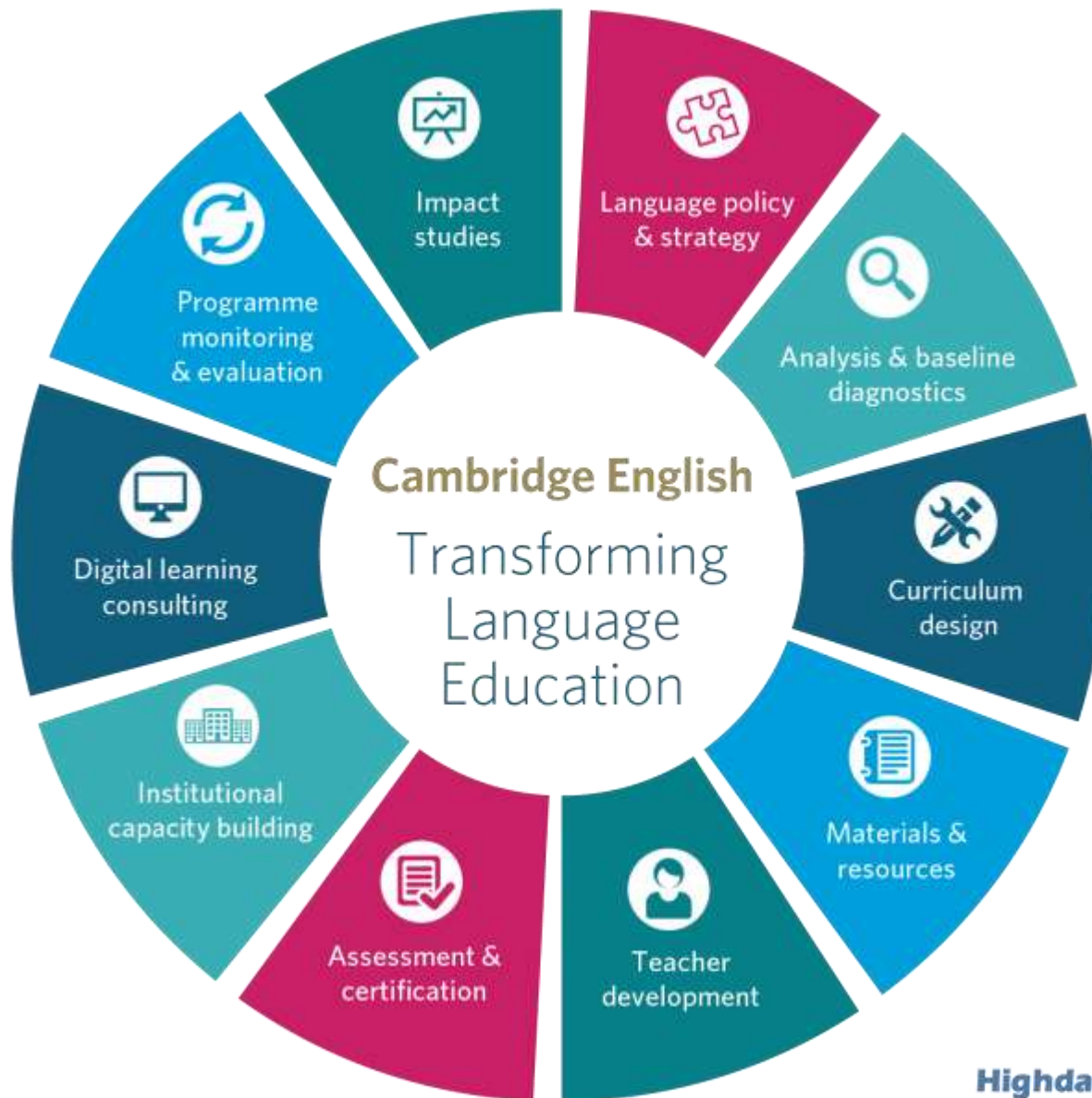
## ***Assessment***

- Baseline
- Diagnostic
- Placement
- Proficiency
- School graduation
- Preparation courses
- Train own staff to write low stakes assessments
- Offer tailor-made (low stakes only)

## ***Teacher training***

- PRESETT
- INSETT
- Language upskilling
- CPD
- OER for reputation

# Value chain of transformation



# Working with ministries (MOE)

## *Tips:*

- Build personal links to MOE over time
- Use local contacts (agents, educationalists, chambers of commerce) to make introductions and influence decisions
- Pester the UK Embassy, British Council, DIT to take you to the MOE
- Make friends with HMA
- Know the local situation, challenges, issues & success deficit
- Know the language policy in your target countries
- Offer to advise to update and improve the policy
- Do work free as a loss-leader
- Find a political short-term win for elected officials
- Work with local experts to tailor and build ownership
- Keep costs down with standardised content
- Write & present on area of expertise – ‘thought leadership’

# For UK providers

## ***ELT Working Group is re-launching:***

- Government support for export drive
- Department of Industry & Trade (DIT) stakeholder meetings
- Aim to increase UK ELT export earnings from inbound students and export sales of products & services
- Aim to share opportunities for ELT export work – students, consulting, teacher training, publishing
- ***Chair of ELTWG:*** michael@highdale.org

# 4 - What can you do? Diversify...

- Look at new niches & segments
- Look at wider demand in-country
- Look at digital directions
- Diversify with parallel income streams
- Disrupt ***yourself*** with:
  - 'premium brand' development
  - 'value brand' development
- Shibboleths!
  - Levels/hours/methods



*English with Lucy ....*

# Modified Ansoff

	Current Products	New Products
New Markets	<b>Market Development</b> [eg new source countries]	<b>Diversification</b>  [eg digital in source countries, MOE, TT]
Current Markets	<b>Market Penetration</b> [eg price competition, agent investment]	<b>Product Development</b> [eg ESP, new niches, digital]

# Diversify

## ***Internal***

- New courses & services
- From product to experience

## ***External***

- Remote & online services
- New engagements in new locations

## ***Left field***

- Consultancy, ministries
- Culture, leadership

“Recently clients do not request normal English lessons only”

*Study Travel Jan 2017*

## ***Segments & niches***

- Business
- Culture
- Junior
- ESP (eg TVET, health)
- EAP
- Pathway, foundation
- EMI
- Online, blended, adaptive
- Remote
- Synchronous tutoring
- Consultancy
- Ministry

# Are you a CD or a concert?

## Emphasise Learner Experience

- Is your course a product or a service or a personal experience?
- Can the learner influence, modify, adapt, affect, change the experience to suit their needs, wishes, desires?
- Are you RyanAir or Jules Verne tailormade holidays in flexibility?
- Are you EasyJet or Emirates in service levels?



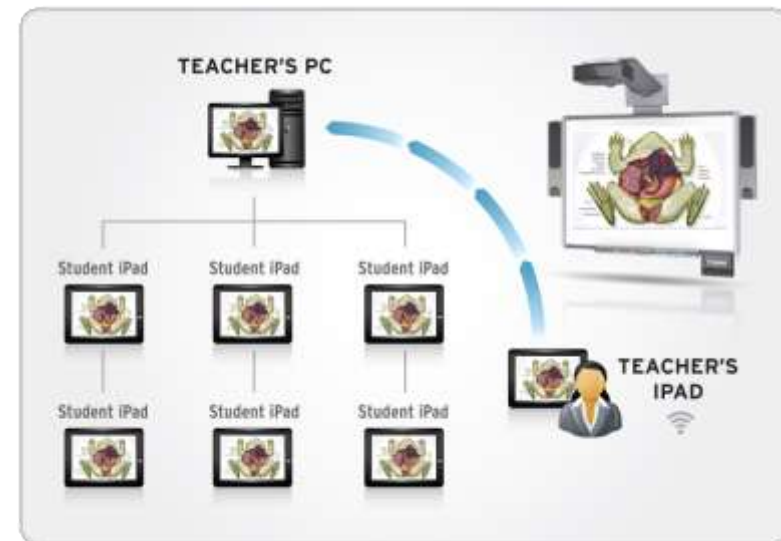
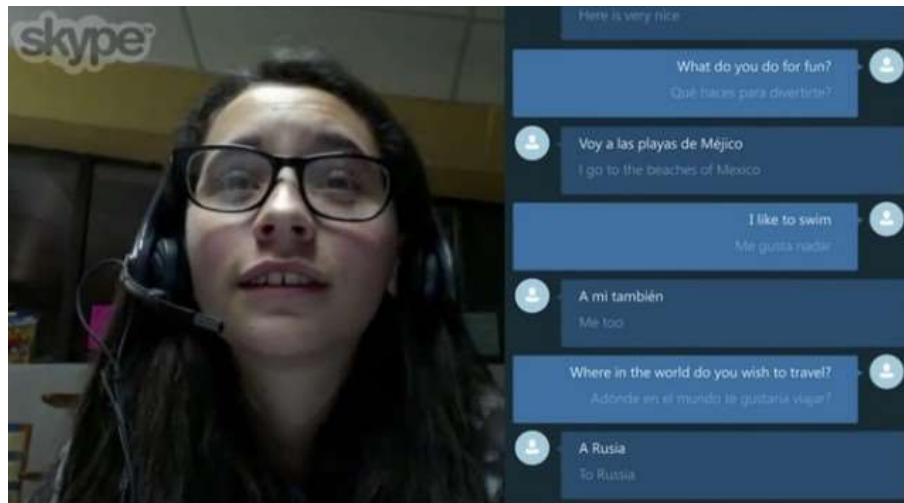


# Embrace the digital experience



## Meet Pilot

The world's first smart earpiece which translates between users speaking different languages.



# Take Aways

- 1 **General English** alone is not enough - Learners need broader and more flexible choices of content and modality
- 2 Competition is coming from new and unexpected directions
- 3 Research your markets and their segments: identify new niches and new USPs
- 4 Embrace new approaches, new products, new markets, new partners – watch the trends!
- 5 **The Next Billion** provide new market opportunities, new clients from new places with new needs
- 6 Enhance your Learner Experience
- 7 Audit your digital strategy
- 8 Disrupt yourself!

# Thanks!

Digital Language Learning & Teaching

[www.amazon.co.uk](http://www.amazon.co.uk)

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