

English UK priority markets

2015 – 2017

As part of English UK's 2015 – 2017 international strategy, global markets have been analysed and categorised into four tiers.

The international strategy aims to foster growth in both volume and value of the UK English language teaching market, and to improve the reach and profile for UK ELT as the educational and commercial partner of choice.

This is achieved through the delivery of a range of international activities, primarily business-to-business channels but also direct and partnership channels, that focus on source markets with the greatest demand and capacity for English language learning in the UK.

How have we decided in which tiers to place markets?

English UK collects student data from all our members annually. We also collect quarterly data from a limited cross-section of our membership.

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 and year-to-year trends from English UK student data and country demographics)
- Demand for English (rating on the EF English Proficiency Index + market knowledge)
- Capacity to pay (global economic data looking at the current state of the market's economy and forecast for short, mid and long-term growth + foreign exchange/currency)
- Existence of significant scholarship programmes
- Connectivity with the UK (proximity, visas, 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.

Tier One

Brazil, China, Colombia, Gulf States, Mexico, Thailand, Turkey

These are our most important territories, due to their having the greatest potential for short to mid-term growth and where the 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.

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

English UK is now planning specific 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 a B2B event, B2C campaign or trade mission. These markets will also be singled out for special focus during planning for our regional or global activities (such as the English UK overseas fairs and StudyWorld London).

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's ELT sector.

Tier Two

France, Germany, Italy, Japan, Russia, South Korea, Spain, Switzerland, Taiwan

These 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 on-going engagement should be supported through some of the channels of the international strategy.

These territories are in the top twenty source countries for the UK's ELT sector, 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.

Tier Three

Argentina, Azerbaijan, Chile, Hong Kong, Kazakhstan, Maghreb, Mongolia, Peru, Poland, Ukraine, Uzbekistan, Venezuela, Vietnam

These are markets from where the UK already receives growing numbers of ELT students, where we have existing and productive relationships and where 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 the UK's ELT sector 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.

Tier Four

Angola, Egypt, India, Indonesia, Iran, Iraq, Libya, Nigeria

Tier 4 markets are those where we foresee huge 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.