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INTERNATIONAL  
EDUCATION  
MARKETING

# **The demand for UK summer school programmes in mainland China**

*A market report for English UK*

**August 2017**

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## Table of Contents

<b>1.</b>	<b>Executive Summary</b>	<b>4</b>
<b>2.</b>	<b>Introduction and Methodology</b>	<b>6</b>
<b>3.</b>	<b>Market Overview and Trends</b>	<b>7</b>
	3.1 Market size and growth .....	7
	3.2 Types of programme .....	11
	3.3 Destination Countries.....	15
	3.4 Student profile.....	17
	3.5 Regional origin of students .....	20
<b>4.</b>	<b>Student and parent demands</b>	<b>26</b>
	4.1 Decision makers and information sources.....	26
	4.2 Reasons for attending overseas summer school programmes.....	27
	4.3 Important factors when choosing programmes.....	30
	4.4 The UK's advantages and disadvantages.....	37
	4.5 Unmet demands .....	39
<b>5.</b>	<b>Marketing and agent relationships</b>	<b>41</b>
	5.1 UK summer schools' priorities in agent relationships.....	41
	5.2 Meeting new agents and building relationships.....	42
	5.3 Supporting Chinese agents.....	44
	5.4 Promotional channels.....	46
<b>6.</b>	<b>Difficulties experienced in the Chinese market</b>	<b>49</b>
	6.1 Excessive preference for tourist visits .....	49
	6.2 Strong preference for certain locations.....	49
	6.3 Difficulties in communication with Chinese agents.....	50
	6.4 Homestays.....	51
	6.5 Characteristic weaknesses of Chinese students.....	51
	6.6 Inexperience of some group leaders.....	52
	6.7 Price sensitivity.....	52
	6.8 Demanding customers.....	52
	6.9 Food preferences .....	53
	6.10 Importance of student diversity .....	53
<b>7.</b>	<b>Future Trends</b>	<b>54</b>
	7.1 Overall market growth .....	54
	7.2 Diversification of destinations, but continued UK strength.....	54
	7.3 Particularly strong growth in younger students.....	54

7.4 Increasing demand for unique programme types, but “language plus” will remain dominant.....	54
7.5 More demanding and sophisticated parents.....	55
7.6 Continued dominance of major cities .....	55
<b>8. Opportunities, Challenges and Unmet Demands</b>	<b>56</b>

## 1. Executive Summary

This report sets out the results of research by the British Council, in conjunction with English UK, on the mainland China market for UK summer school programmes. It is based on a combination of interviews with UK summer school providers and Chinese agents, online surveys of agents and UK summer school providers, focus groups conducted with Chinese students and their parents, and desk based research.

The overall market is seeing strong growth, with the number of registered agents sending students to UK summer schools growing by around 15 per cent per year over the last four years. Meanwhile, the majority of surveyed agents estimated that they were seeing annual growth of at least five per cent, with around a quarter seeing very fast growth of 15 per cent or more in 2016 compared with 2015.

The UK holds a clear second place in this market behind the US. However, growth in the number of students going to the UK seems to be slightly lower than recent trends in the overall market, largely because of an increasing number of students heading to less-traditional destinations such as those in South East Asia. Despite this, the UK has several key advantages: its historical and cultural background; a reputation for safety; a reputation for high-quality education; and its proximity to mainland Europe, which ensures a diverse student body.

The most popular programme type is the traditional “language plus” course which combines English teaching with activities and visits, although other types of programme – particularly those with a specific theme such as drama – are becoming more popular. In general, students tend to prefer a more standard format of course the first time they attend an overseas summer school programme but become more adventurous on subsequent occasions.

Chinese students’ main goal in attending an overseas summer school is usually to experience overseas culture, although language learning and (in some cases) preparing for potential longer-term study abroad are also important secondary goals. Many parents and agents are also interested in programmes such as school immersion that put participants in closer contact with domestic students, but there is a lack of these programmes on the market.

Most Chinese students are in the secondary school age group but the average age of these students is decreasing. The number of students at lower secondary level (ages 12-15) is growing faster than the number of upper secondary students, while the number of primary-age students is growing faster still.

The majority of Chinese students still come from a small number of large cities and this is likely to remain the case in the near to medium term future. Even though student numbers from smaller cities are growing slightly faster, the four largest “Tier 1” cities still accounted for around half of newly registered agents from 2013 to 2016.

The top factors that Chinese parents see as important when choosing a summer school programme include safety, course content and a multicultural student body, as well as price and location. Summer school operators noted that Chinese students or their parents placed particular importance on tours and visits compared to their counterparts from other countries.

Chinese agents' most common promotion channel is working with local schools or other education authorities, while less than half use online advertising and only a quarter participate in offline student-focused events. Most Chinese parents see trust as one of the most important factors in choosing an agent; they therefore tend to rely on agents that cooperate with their child's school or with a private language class their child attends. Most parents do not shop around or compare different options online.

Industry bodies and the events they organise are the most popular platforms for agents to meet new partners in the UK or other overseas countries. A strong majority also find potential partners through their friends or contacts within the industry. Only a minority report that they have established partnerships after a cold contact from an overseas summer school provider.

One particularly important factor in an agent relationship, according to several interviewees on both the summer school provider and agent sides, is the level of communication between the two partners. Agents value their UK partners' flexibility in terms of course design, while it is important for UK summer schools to ensure that the agent properly understands the value and unique aspects of their course in order to promote it to their potential customers. Building relationships with Chinese agents is seen as more difficult compared to working with agents in many other countries. This is partly due to the relative inexperience of these Chinese agents, as many have only entered the market fairly recently.

Aside from price sensitivity and factors that are important to students globally, common difficulties in China include an excessive focus on tour visits as well as problems caused by inexperienced Chinese agents such as a lack of familiarity with less popular regions of the UK and personal issues with some group leaders. Another factor mentioned by a surprisingly large number of interviewees was food preferences, which means it may be worthwhile for UK summer school providers to work with their Chinese agents to address Chinese student demands in this area.

The market is expected to continue to grow over the next few years, bringing more opportunities for UK summer school providers. The speed of growth will be fastest in the younger age group and in China's smaller cities; however, the largest markets will continue to be in the secondary age group and in Tier 1 cities respectively. Meanwhile, agents and summer school providers reported that programmes with a specific theme are becoming increasingly popular and Chinese students' overall quality demands are increasing. These two trends are likely to continue over the next few years.

## 2. Introduction and Methodology

China is a hugely important market to the UK's international education sector. Almost 98,000 students from mainland China studied at UK universities in the 2015/16 academic year, far outnumbering those from any other country. Meanwhile, mainland China has now overtaken Hong Kong as the largest single source of international students at UK independent schools according to statistics from the Independent Schools Council.

China is also increasingly important to the English language sector. English UK's annual student statistics report shows that mainland Chinese students now account for more than one in 20 student-weeks at private-sector English UK member centres. This scale comes with continuing growth in contrast to a decline in the market as a whole. Among the top 10 sending countries, China was one of only two top-10 markets to see an increase in student-weeks in 2016, and the only such market in 2015.

Summer school programmes represent an important component of this market and account for a significant proportion of Chinese students travelling to the UK to study English. In addition, these programmes have a significant effect on HE student mobility, as many participants are interested in longer-term overseas study in the future.

This report sets out the results of research by the British Council, in conjunction with English UK, on the mainland China market for UK summer school programmes. The goals of this research were:

- To understand the current status of China's summer school market, including the main programme types and destinations.
- To understand how Chinese agents promote summer school programmes, how they find new partners, and what type of support they find useful from overseas partners.
- To understand what Chinese students and their parents find attractive in a summer school programme and how satisfied they are with UK programmes
- To analyse recent and likely future trends in the popularity of summer school programmes, including changes in popular programme types and student profiles

The report is based on a mixture of quantitative and qualitative research:

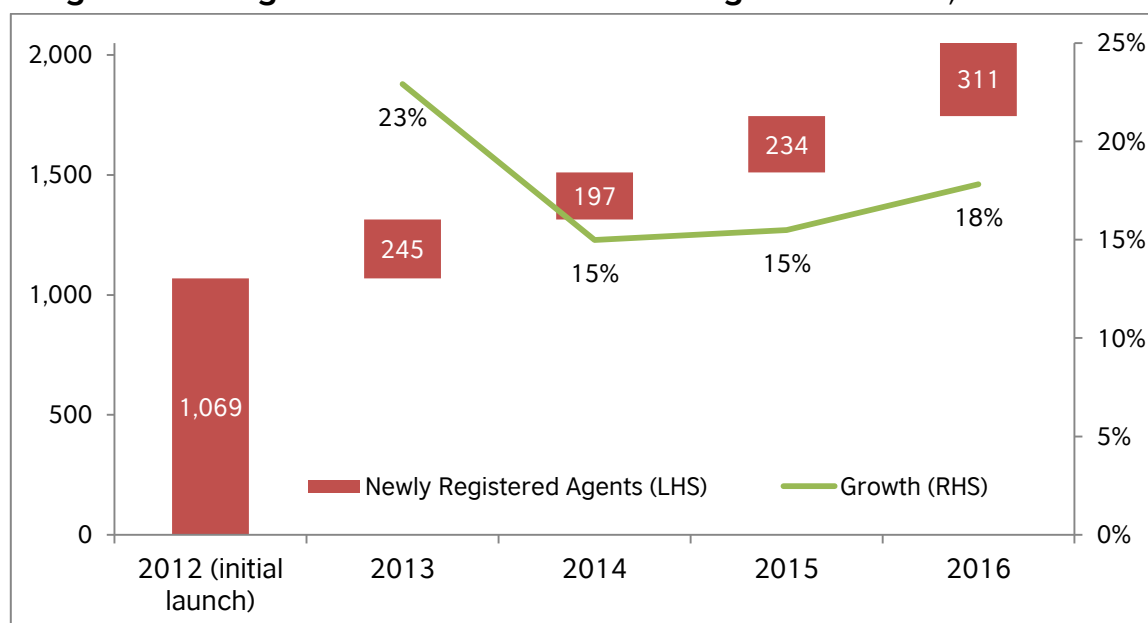
- Analysis of previously published material on the subject in English and Chinese
- In-person and telephone interviews with Chinese agents and UK summer school providers as well as discussions with some non-UK summer school providers and an online survey of UK summer schools.
- A quantitative online survey of 95 Chinese agents
- Focus groups of summer school participants and their parents in an established "Tier 1" city (Beijing) and a rapidly developing inland city (Chengdu)

### 3. Market Overview and Trends

#### 3.1 Market size and growth

The number of Chinese students coming to UK summer schools is seeing strong growth. As of the end of 2016, 2,056 agents in mainland China<sup>1</sup> were registered with the British Council as interested in sending students to UK summer school programmes. This number has grown by 92 per cent since the registration system was launched in 2012.

**Figure 3.1: Registered UK summer school agents in China, 2012-2016**



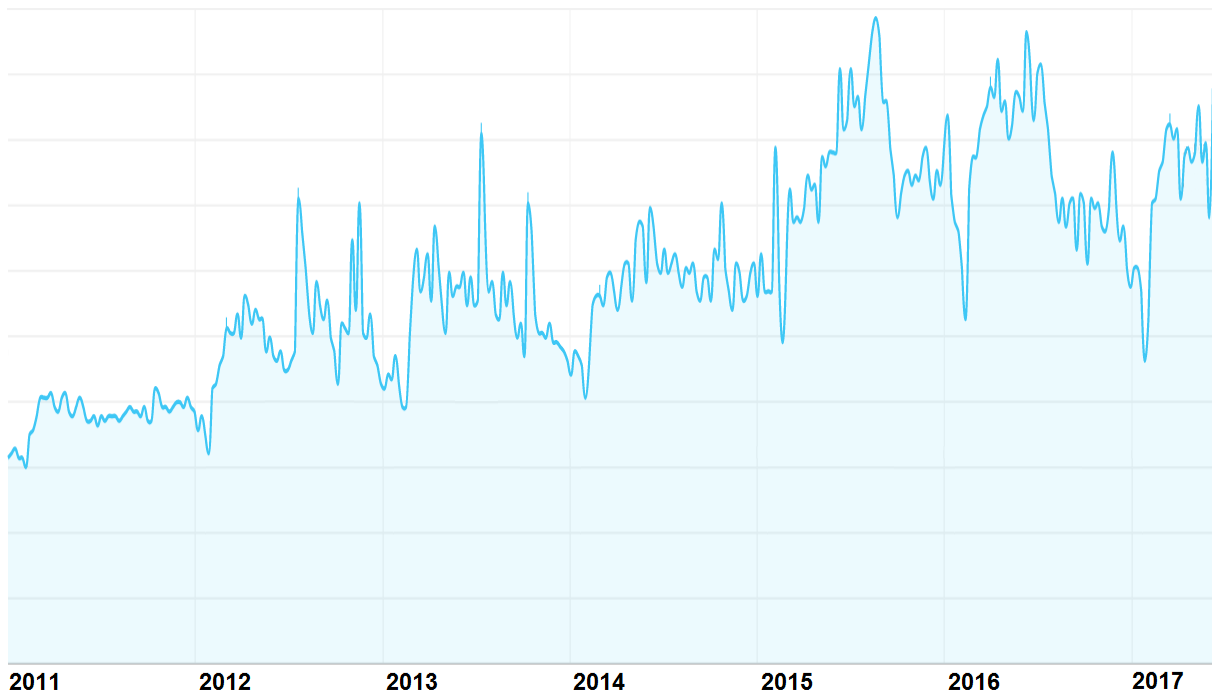
Source: British Council, 2016

The overall size of China's short-term study-abroad market was estimated to be around 350,000 students in 2014, according to a report from investment company Huatai Securities, with a total market value of 9 Bn RMB. This corresponds to an average of around 26,000 RMB, then £2,700, per student. Other estimates are similar, with online education services platform Juesheng estimating 300,000 such students in 2014. A large proportion of these students would be on summer school programmes, although the figures also include school exchanges and other short-term overseas programmes.

Another indicator of the growing popularity of short-term study abroad programmes can be found in the volume of searches on Baidu, the most popular Chinese search engine, for “游学” (“youxue”, literally “study tourism”, the most common Chinese term for short-term overseas study programmes). This search volume data shows a significant rise over the last six years, with around 2.3 times as many searches in 2016 as five years earlier. This is equivalent to a compound annual growth rate of 18 per cent per year.

<sup>1</sup> This total only includes agents whose main registered address is in mainland China, and does not count agents who recruit Mainland Chinese students but are based elsewhere

**Figure 3.2: Baidu search volume for 游学 (“study tourism”), 2011-2016**



Source: Baidu, 2017

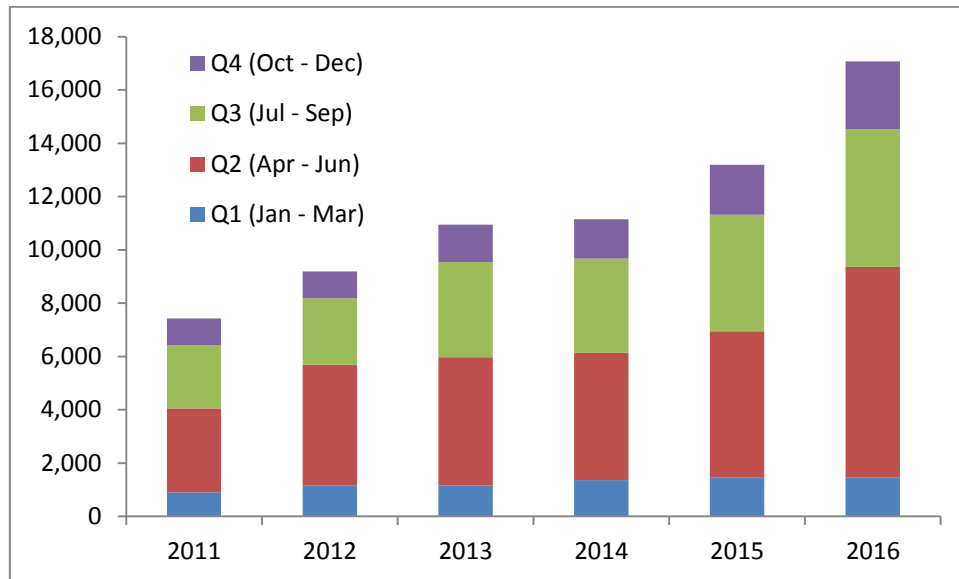
Statistics from English UK show that almost 25,000 students from mainland China studied for a combined total of over 85,000 student-weeks in UK private-sector English language centres in 2016, although again this includes other types of student as well as summer school participants. The total number of students from mainland China grew by 13 per cent over 2015, following 19 per cent growth the previous year. At the same time, growth in the number of student weeks was much lower, which shows that Chinese students are increasingly coming to the UK for short-term courses such as summer school programmes.

Student visitor visas have also seen significant growth. The number of short-term study visas issued to students from mainland China increased by 29 per cent in 2016, to a total of over 17,000. Although these visas are issued to students on a variety of programme types, the bulk of applicants are believed to be made up of English language students.

The second quarter of the year saw by far the largest number of visa issuances, making up almost half of the student visitor visas issued in 2016. This is again consistent with summer school programmes accounting for a large proportion of total students. In 2016 the number of visas issued in Q2 was up 44 per cent over the same quarter in 2015, which in turn was a 15 per cent increase over the second quarter of 2014. Over the last five years, the number of student visitor visas issued to applicants from mainland China has increased by an average of 18 per cent per year, while the number issued in Q2 has increased by 20 per cent per year.



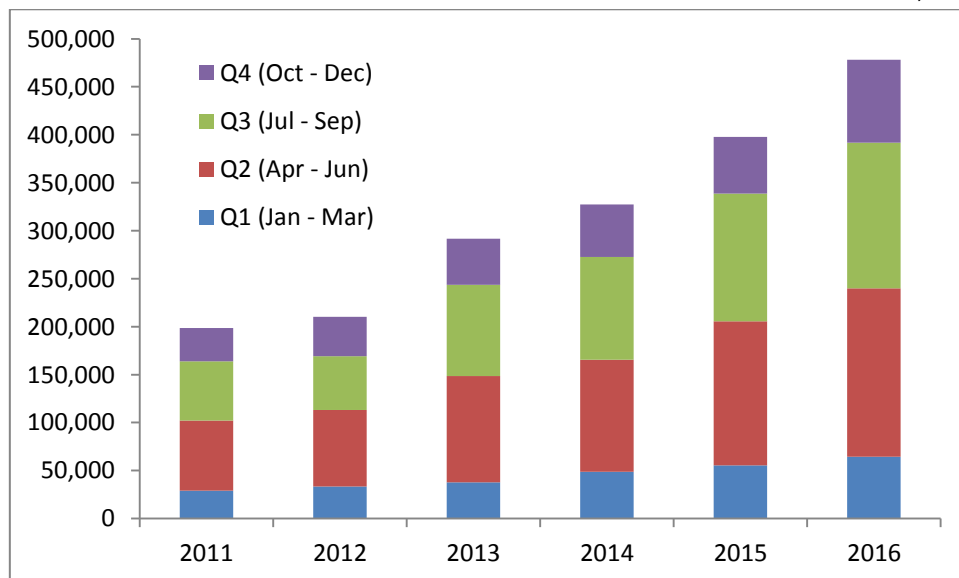
**Figure 3.3: Growth in UK short-term study (student visitor) visas issued to mainland China citizens, 2011-2016**



Source: Home Office, 2017

As mentioned above, not all of these students attended summer schools and some summer school students arrived on standard visitor visas. However, the large share of visas issued in Q2 shows that most students probably did come to the UK over the summer. The number of standard visitor visas issued to Chinese citizens has grown at a similar pace to student visitors, increasing by an average 19 per cent per year over the last five years, although summer school and language students will represent only a small proportion of these visas.

**Figure 3.4: Growth in UK visitor visas issued to mainland China citizens, 2011-2016**

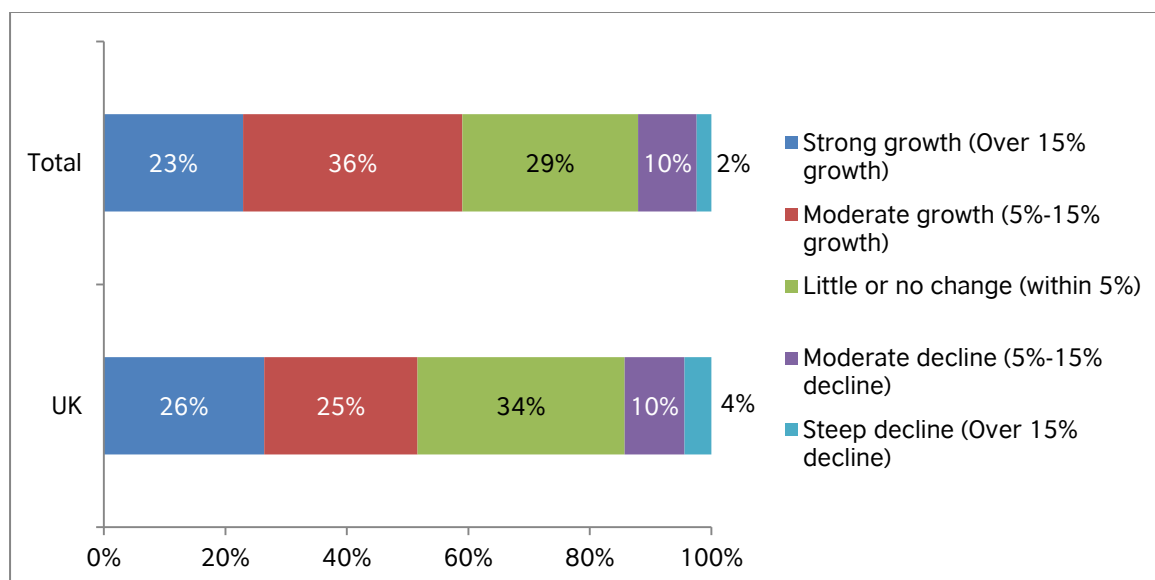


Source: Home Office, 2017

From the perspective of existing agents, more than half of surveyed agents reported year-on-year growth of at least five per cent in 2016. A quarter reported very strong

growth of over 15 per cent. In comparison, only one in eight reported a decline in student numbers with only 2 per cent seeing a drop of 15 per cent or more. But the increase in students going to the UK appears to be slightly lower than the overall total growth rate, suggesting that the UK's market share is declining.

**Figure 3.5: Growth in students sent to overseas summer school programmes, 2016**



Source: British Council, 2016 (based on a survey of Chinese summer school agents)

Among the agents who responded to our agent survey, 92 gave figures for the approximate number of students they sent abroad on summer school programmes in 2016. These 92 agents accounted for slightly over 30,000 summer school students in total, of whom around 8,500 went to the UK.

When weighted by student numbers this growth is even more impressive. Larger agents seem to be seeing faster growth than the market as a whole, and agents who reported growth of at least 5 per cent represented almost 80 per cent of students in 2015. Those who saw a decrease in student numbers accounted for only 8 per cent of summer school students.

Agent interviews also provide evidence of strong growth in the market as a whole. One agent mentioned that their bookings sold out very quickly in 2016, while another said that their summer school student numbers had quadrupled over the last five years. However, opinions on the UK were mixed. One commented that “compared with overall growth, the UK market didn’t increase very well this year”, while another said that the UK had seen higher-than average growth due to safety concerns about mainland European destinations. On the UK side, most interviewed summer school operators reported strong growth in Chinese student numbers.

Along with a growth in demand, agents see their customers as increasingly sophisticated. In the words of one agent, summer school programmes are “moving from simple language study to diversified programmes with a wide range of different courses

and out-of-class activities”. More details of these changes and trends, including those related to the age of students and their regional distribution, can be found in the following sections of this report.

## 3.2 Types of programme

### 3.2.1 “Language plus” programmes

Agents and summer school operators both reported that the bulk of their summer school business still came from so-called “language plus” programmes, which combine classroom language study with other activities or tourism. This was also the typical type of programme mentioned by students and their parents in focus groups and was the main programme type found through analysis of agents’ websites.

Focus group research reinforced the finding that language plus programmes are still the most popular type of programme in the Chinese market. Among focus group participants (including both students and their parents), this was the only type of programme that had previously been attended by any student. It was also the most popular programme type being considered for future study, although some students and parents were also considering pre-university taster courses.

The most common format, based on programmes advertised by agents, is overwhelmingly a half-day course plus half a day of activities or visits. These activities are varied but typically include sports, art, cultural activities such as afternoon tea, and tourism. Aside from visits to traditional tourist destinations, visits to prestigious universities are particularly common, even on courses aimed at relatively young students.

These programmes are available for students in all age ranges, but as discussed in Section 3.4 the bulk of agents aim at the middle school to high school market (ages 13-18). The large majority of agents advertise programmes which last for two or three weeks, but in many cases only five to seven days of classes are included. The other week then typically consists of tourist visits – often to other parts of the UK, or (particularly on longer programmes) to mainland Europe. Students almost always stay in a homestay environment for the study phase of the programme.

Tourism and cultural visits play an important role in most UK summer school programmes, and this is particularly true for Chinese students. There was some indication from agents that this was becoming less prominent over time, but summer school operators, agents and focus group participants all agreed that this was still seen as essential by the majority of students and parents. Attitudes towards tourism are discussed in more depth in Section 4.3.

Based on analysis of the websites of major agents, typical prices for two-week language plus programmes in summer 2017 are around 30,000 to 38,000 RMB (£3,400 to £4,300), including flights, accommodation and all activities.

### **3.2.2 University or school experience programmes**

As discussed in Section 4.2, a significant proportion of Chinese summer school students have at least some interest in longer-term overseas study in the future, usually at university level. As a result of this sources of all types – including summer school providers, agents, and focus group participants – reported a certain level of interest in pre-university taster programmes. Unsurprisingly this is mainly among upper secondary students.

Many students are interested in experiencing university life in the UK or another Western country, particularly (but not always) linked to a field they are interested in studying at degree level. Partnership with prestigious universities was seen by agents as a particularly important selling point.

Experiencing UK university study is also a key driver for summer school programmes aimed at current university students. These often attract students who may be interested in studying a UK Master's degree course. Even in younger age groups, students or their parents are still interested in visits to prestigious overseas universities – several interviewees reported going to top UK or US universities as part of a summer programme, although this was in the form of tourism rather than university study.

At university experience programmes, in addition to subject and English teaching, content includes sessions aimed to help students apply for UK universities such as personal statement writing or interview techniques. Tourist visits are generally not a major part of the programme, with the exception of visits to prestigious universities.

One agent and a representative of a summer school programme organised by a UK boarding school also mentioned a strong interest in school experience programmes, where students experience typical subject lessons as taught in a UK school. As with the university taster programme, this demand usually – but not always – comes from students or parents interested in longer-term study in the UK at this level.

Programmes that aim to give students a UK boarding school experience tend to follow a similar format of morning classes and afternoon activities to the language plus programmes described in the previous section, but are less likely to include tourist visits a long way from the school.

Meanwhile, more academically-focused programmes – such as those offering preparation for particular English qualifications or other exams – are more likely to be held at a boarding school location. These programmes have a stronger focus on teaching rather than activities.

As with language plus programmes, the typical length of school or university experience programmes is two weeks, but based on the surveyed programmes the students are likely to study for the whole period rather than spending a week on an extended tourism trip. Prices listed on agents' websites started from 22,000 RMB (£2,500) excluding flights, while all-inclusive 2-week programmes cost around 33,000 to 40,000 RMB (£3,700 to £4,500). Agents offering both language plus and boarding school

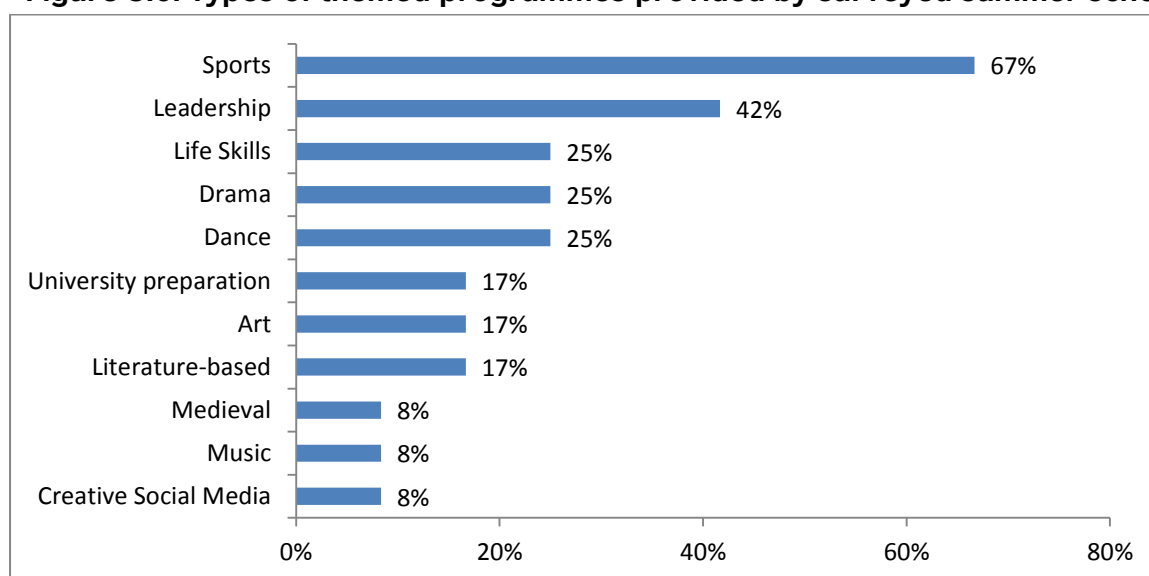
programmes appeared to price the latter programme type at the higher end of their price range.

### 3.2.3 Programmes with a particular theme

Agents reported that demand is becoming more diversified. One agent commented that “students are increasingly choosing programmes with a particular theme”, while another said that “parents’ demands are getting higher, and they are no longer satisfied with basic tourism and language courses”.

UK summer school operators also point to the increasing demand for specialised courses. Of 17 surveyed summer school providers, 12 said that “programmes with a particular theme” were among the summer school programmes they offered (excluding university preparation). Sports-themed programmes were offered by eight of these schools, making this the most popular theme; other popular themes were leadership, dance, drama and life skills.

**Figure 3.6: Types of themed programmes provided by surveyed summer schools**



Source: British Council survey of summer school operators, 2017.

Base: All schools offering “programmes with a particular theme”.

Within the “sports” category, the most popular type of programme offered was general sports programmes. Football (soccer) was the next most popular, offered by four summer school operators – making up half of those offering sports programmes, or a third of all those offering themed programmes. Other sports offered by multiple summer schools included tennis and water sports. Less common options included golf and horse riding. The literature-based programmes in the above chart include programmes themed on Harry Potter, Sherlock Holmes, and the works of JRR Tolkien.

One interviewed summer school operator reported that a drama-focused course was extremely popular among Chinese students in 2015, while another discussed the rising popularity of pre-university taster courses.

Based on an analysis of courses featured on agents' websites, the top recurring themes appear to be football, arts, and leadership programmes aimed at middle and high school students. Aside from the theme, the general format of these programmes is similar to that of language plus programmes, and pricing is also similar.

Although the popularity of themed programmes is rising, interviews with agents and summer school providers, as well as student and parent focus groups, show that these programmes only account for a relatively small number of actual students. One reason for the current dominance of standard language plus courses may be simply a lack of awareness of different course types. In most focus groups, a significant proportion of students or parents expressed an interest in themed programmes after they were mentioned by the moderator, but most were not aware of them initially. After the subject was mentioned, art and music were the most popular themes suggested by both students and their parents.

Some participants, including both students and parents, suggested that it would be better to start with a more basic or generic programme for their first overseas summer programme, while they could take more specialised courses in later years once they had more overseas experience. Attitudes towards course choice are discussed in more detail in Section 4.3.

### **3.2.4 Course duration**

In most cases, the length of overseas summer school programmes attended or considered by focus group participants ranged from around 10 days to 3 weeks. Two week programmes were the most common.

Course duration was linked both to students' ages and to their previous experience with overseas summer school programmes. In general, students participating in or considering longer courses tended to be older, while students who had already been on a summer school programme abroad were more likely to consider longer courses in the future.

Research carried out by market research firm Ipsos on behalf of New Oriental, a major Chinese language school chain which also acts as an overseas education agent, showed similar results. Their survey showed that "2-4 weeks" was the most common course duration, followed by 1-2 weeks<sup>2</sup>; these two categories together accounted for 86 per cent of all respondents. Similarly to our own findings, this report found that younger students tended to go on shorter courses, with the 1-2 weeks category the most common duration for primary-age students while 2-4 week courses were the most common course length for students at the lower secondary and upper secondary levels (ages 12-15 and 15-18 respectively).

Programmes booked online appear to have slightly longer durations, according to research by online travel site Tuniu. Although this research agreed that 2-4 week

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<sup>2</sup> The categories given in this report appeared to overlap, and it is not clear how a course of exactly two weeks would have been classified

courses were the most common followed by 1-2 week programmes, it found that 20 per cent of students attended programmes of 4 weeks and above.

### **3.2.5 Summer and winter programmes**

Interviewees commented that summer programmes were significantly more popular among Chinese students than winter programmes. This was particularly true for students from South China, who according to one interviewee “don’t go abroad during the winter”. In contrast, students from areas of North China such as Beijing had strong demand for overseas study during the Chinese New Year holiday. This holiday is typically around a month in length and starts in mid-to-late January, although the exact dates vary from province to province and from year to year depending on the date of Chinese New Year.

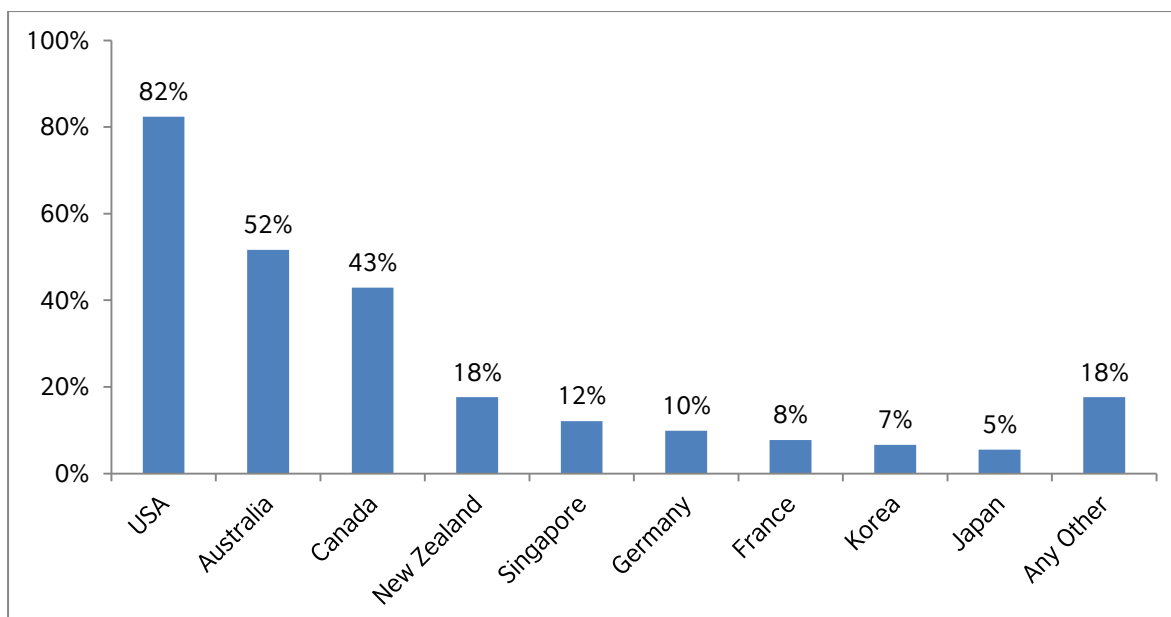
Research by travel provider Tuniu showed that a substantial proportion of students who book short-term study abroad programmes online are interested in winter programmes. These account for around 30 per cent of all online bookings. However, this does not necessarily mean there is such a large potential market for winter programmes in the UK. The report commented that “most [of these] students tend to choose warmer destinations in the Southern Hemisphere, particularly Australia and New Zealand”.

### **3.3 Destination Countries**

Among the surveyed agents, UK-bound students accounted for around 28 per cent of the summer school students sent abroad. However, as the sample was specifically made up of agents registered with the British Council, the UK’s true share of the overall market is likely significantly lower than this. Based on figures from English UK, around 24,700 students from mainland China studied at English UK’s member centres in 2016, up 13 per cent over 2015.

Even among the surveyed agents, only a small minority dealt exclusively with UK summer schools. More than four in five of these agents also had relationships with summer schools in the US, while slightly over half sent students to Australia and 43 per cent sent students to Canada. Other destinations were substantially less popular.

**Figure 3.7: Other overseas destinations of agents sending students to the UK**



Source: British Council, 2016 (based on a survey of Chinese summer school agents). Due to the nature of the sample (agents registered with the British Council), all agents sent students to the UK, and the UK therefore is not shown on this chart.

Agents commented that the major competitors for UK summer school programmes were programmes in the US and to a lesser extent other English-speaking countries and mainland Europe. Japan and Korea are seen as less important competitors. Interviewees commented that programmes in mainland China did not really compete with UK programmes given the different goals and the importance of the overseas cultural experience.

Previously published research from Ipsos and New Oriental found that the UK was the second most popular destination country behind the US for short-term study abroad students (including summer schools as well as other exchanges). 26 per cent of participants had gone to the UK, but as many had studied in more than one country this suggests a UK market share of around 14 per cent<sup>3</sup>.

Most agents reported that their growth in students heading to the UK was similar to that of their overall student numbers. However, among those who said the rate of growth was different, a slightly larger number of agents reported that the UK was growing slower than the overall average (21 per cent of agents) than those who said it was growing faster (15 per cent of agents).

Agents saying that they saw slower UK growth than the overall market average often mentioned a widening market for overseas summer school programmes. In addition to traditional destinations such as the UK and US, these agents said that they were seeing faster growth in areas closer to China – one mentioned that “although the market for [traditional destinations] is growing, South East Asian countries are surging ahead”. On the other hand, some agents commented that terrorist attacks in mainland Europe had

<sup>3</sup> This is because surveyed students had studied in 1.9 countries on average



had a negative effect on the overseas summer school market as a whole but particularly in France and Germany. (Interviews took place before the recent attacks in the UK).

Findings on attitudes towards choosing a destination country and programme can be found in Section 4.3, while information on the UK's advantages and disadvantages can be found in Section 4.4.

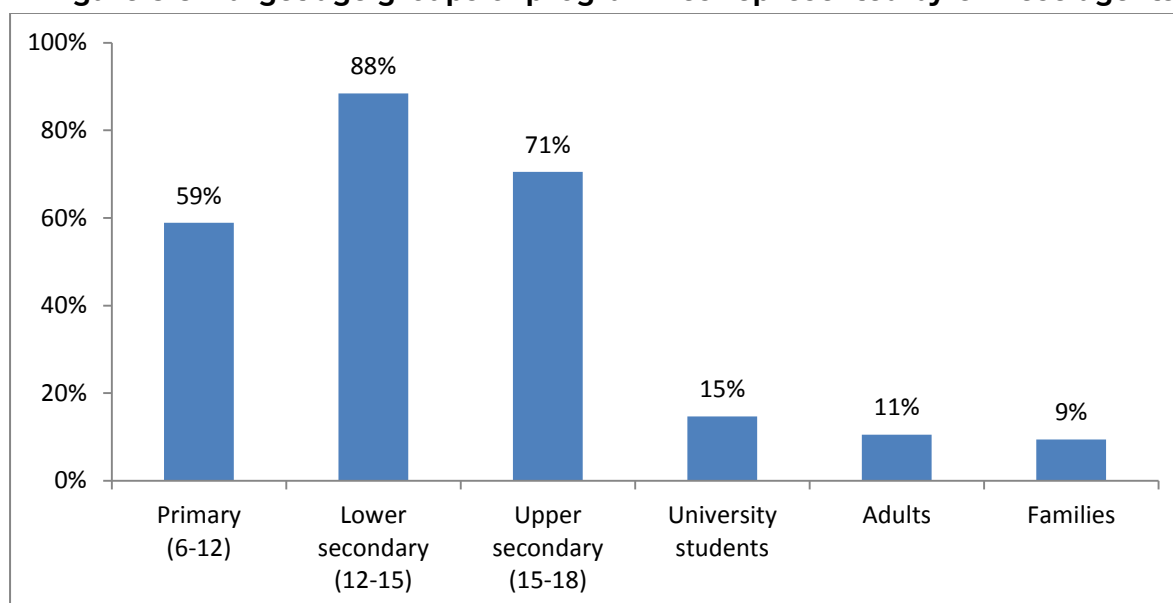
### 3.4 Student profile

#### 3.4.1 Student characteristics

Overall, the most common age range served by surveyed agents was the lower secondary age group (ages 12-15). 88 per cent of the surveyed agents promoted summer school programmes for this age group, compared to 71 per cent promoting programmes for upper secondary students. 59 per cent of agents said that their customers included primary students, but most of these also served older students and agents generally said that these younger students only represented a relatively small proportion of their business.

Summer programmes aimed at university students were less common, only offered by one in seven agents, while adult and family programmes were even less common.

**Figure 3.8: Target age groups of programmes represented by Chinese agents**

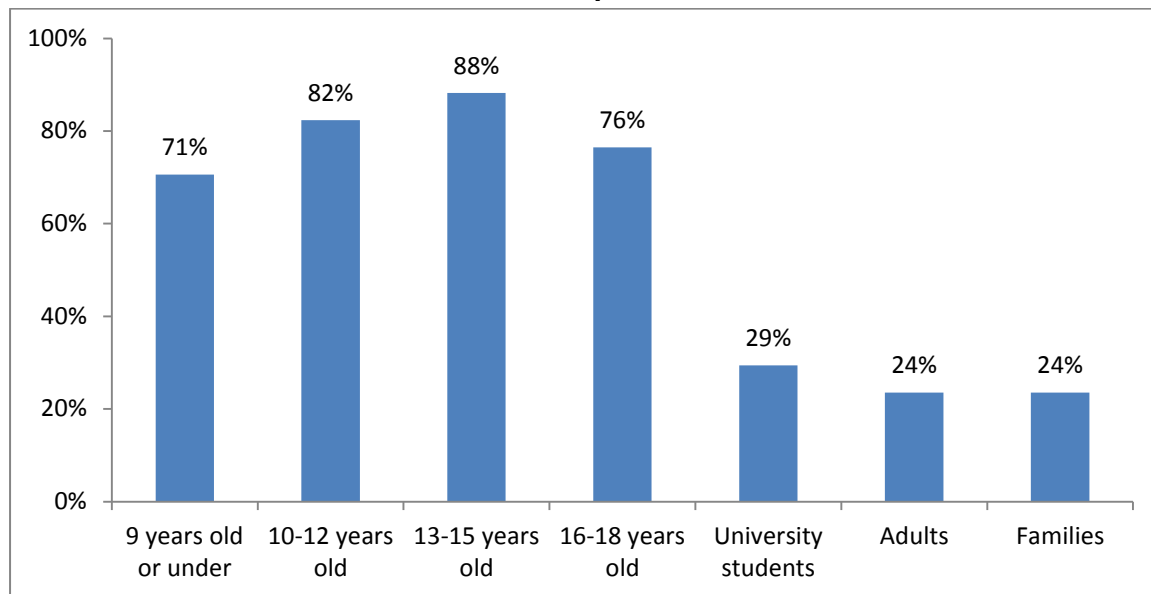


*Source: British Council, 2016 (based on a survey of Chinese summer school agents). Figures refer to the proportion of agents, not total student numbers*

Similarly, almost all interviewed UK summer school providers offered courses to both lower and upper secondary age students, as well as older primary students. Almost all surveyed summer school providers said that they offered programmes to the 13-15 age group, while the proportion dropped off slightly on either side of this age group. As with

the agents, a relatively large proportion of surveyed UK summer schools said that they had programmes for younger students, but there were considerably fewer programmes for university and adult students and for family groups.

**Figure 3.9: Target age groups of programmes offered by surveyed UK summer school providers**



Source: British Council, 2016 (based on a survey of UK summer school providers).  
 Figures refer to the proportion of institutions, not total student numbers

Agents offering programmes at multiple levels tended to say that their customers are mainly secondary school students, which shows that primary students make up a smaller proportion of total students sent abroad compared to the proportion of agents representing these programmes. Survey research from Ipsos and New Oriental found that 72 per cent of surveyed short-term overseas study participants were in the secondary age group, while research from online travel provider Tuniu showed that 73 per cent of online bookings for short-term overseas study were for lower- or upper-secondary students.

One significant difference between the latter two findings was a much larger proportion of university students in the New Oriental research, standing at almost 20 per cent compared to only three per cent reported by Tuniu. This may be because a large proportion of university students going abroad do so on programmes organised or promoted through their university, rather than booking commercially-available programmes online. (Indeed, the majority of short-term study abroad students at all levels attend programmes arranged through their school or through another training provider such as after-school English training centre, as described in Section 5.4).

The proportion of younger students is significantly lower. Ipsos / New Oriental reported that 9 per cent of students were of primary age or below, while Tuniu's figures for online bookings were similar with primary-age students making up 11 per cent. However, although demand among secondary-age students was higher, agents and summer

school providers agreed that demand for programmes aimed at younger students is growing at a much faster rate.

Several interviewees from UK summer school providers said that their Chinese students tend to be younger than students of other nationalities, with very strong demand among students in their early teenage years. At the same time, many respondents noted that the UK in particular does not offer as broad a selection of programmes for younger students. Despite the UK summer school provider survey finding that most respondents offered courses for young students, several agents commented that their UK partners' age requirements are too restrictive, while one provider offering courses for primary-age students partly attributed their success in this segment to a lack of competition. Another UK school commented that the young age of students from China caused them problems and said that incoming students were sometimes younger than discussed with agents.

One agent put the higher growth in younger students down to younger parents being more internationally minded: "comparing parents born in the 1980s to those born in the 1970s, they have a broader international perspective as well as more professional requirements". The agent believed that this will be reflected in other age groups in the future as these children get older. Meanwhile, parents of younger children in focus groups discussed the importance of building international awareness at an early age.

Students may be less likely to go abroad in the summer before their final year of high school when they are aged 17. In a focus group with upper secondary students, one second-year student<sup>4</sup> mentioned that she had been abroad on summer school programmes several times in the past, but did not intend to do so the coming summer because she needed to prepare for university entry exams – even though these exams would not be until the end of the following school year. This was not the majority opinion but other students did not appear surprised by this attitude.

Aside from these types of summer school programmes, one interviewee mentioned a potential area of synergy. When recruiting for summer school programmes at Chinese schools, they also noticed a demand for overseas training for language teachers at those schools. The interviewee mentioned that this type of training programme could also help to promote their UK summer school options for students.

The research from Tuniu showed that the majority of participants in short-term study abroad programmes booked online were female, with girls making up 56 per cent of participants. Detailed statistics are not available for the overall market but anecdotal evidence suggests a similar breakdown, with more girls than boys.

### **3.4.2 Family background**

The parents who send their children to overseas summer schools tend to be relatively wealthy by Chinese standards. Research from Ipsos / New Oriental showed that the median annual household income of families sending their children abroad for short-

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<sup>4</sup> Upper secondary education lasts for three years in the Chinese school system, from ages 15-18

term study abroad programmes was in the 200,000 to 300,000 RMB band (£24,000 to £36,000), while more than one in six had household incomes of over 500,000 RMB (£60,000). Research from Tuniu on programmes booked online had similar findings, showing that the market for short-term overseas study products was mainly made up of families with annual income over 200,000 RMB.

For comparison, the median household disposable income<sup>5</sup> in China is around 68,000 RMB (£8,200) and only 8.4 per cent of Chinese households earned at least \$35,000 USD (240,000 RMB or £29,000) in 2015 according to statistics from Euromonitor. However, the number of households at this income level has increased with a compound annual growth rate (CAGR) of 28 per cent per year over the last five years.

Based on focus group findings, families of younger students tended to be wealthier and to have more international experience in comparison with those whose children were going abroad at the secondary level.

Another key finding related to family background was that a large proportion of focus group interviewees were at least considering studying abroad on a longer-term programme – often at degree level, but sometimes (for younger students) at high school level. Although the majority are likely to decide against this, the cost involved in overseas study provides further evidence that these students typically come from wealthy families.

### **3.5 Regional origin of students**

Based on agents registered in the British Council database, the so-called “Tier 1” cities of Beijing, Shanghai, Guangzhou and Shenzhen account for a disproportionate share of students. More than half of agents are registered in one of these four cities, with a further 38 per cent registered in “Tier 2” cities<sup>6</sup>.

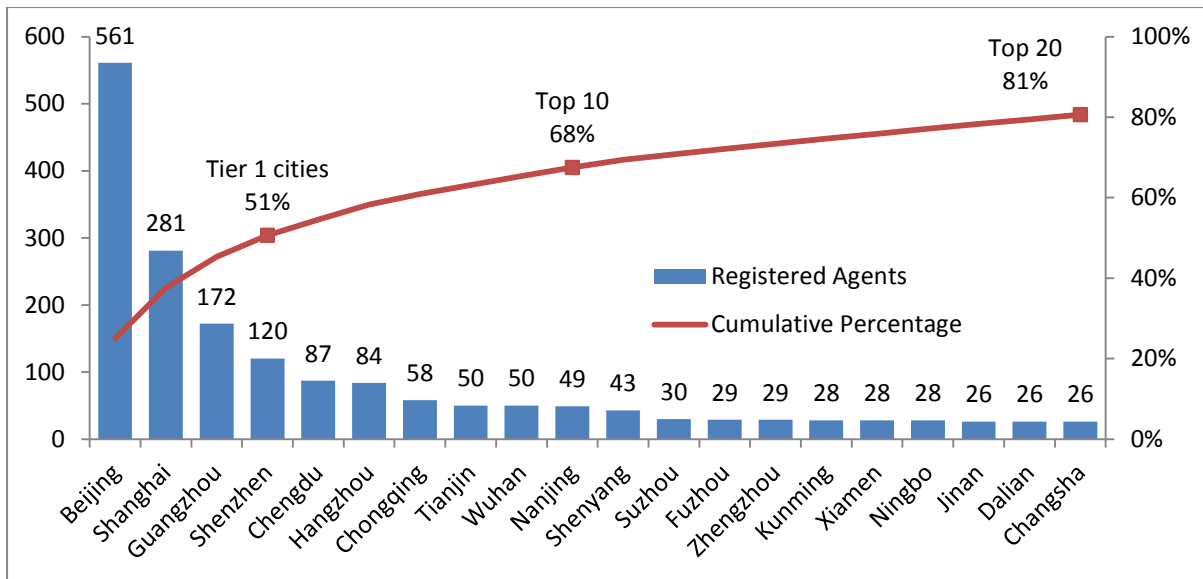
After the four Tier 1 cities, Chengdu in Sichuan province is the next largest in terms of the number of summer school agents, followed by Hangzhou in East China’s Zhejiang province and Chongqing in West China. These cities were all also mentioned by multiple interviewees from the UK summer school sector as major sources of Chinese students. In total, the top ten cities account for two thirds of all agents, and the top 20 account for 81 per cent of the total.

#### **Figure 3.10: Registered UK summer school agents by city**

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<sup>5</sup> Disposable income is defined as income remaining after taxes. It should not be confused with discretionary income.

<sup>6</sup> There is no official definition of city tiers in China, and classifications vary. The definition used in this report includes all provincial capitals and directly governed municipalities (except for the four Tier 1 cities), plus five highly developed non-capital cities: Suzhou, Xiamen, Ningbo, Dalian and Qingdao.



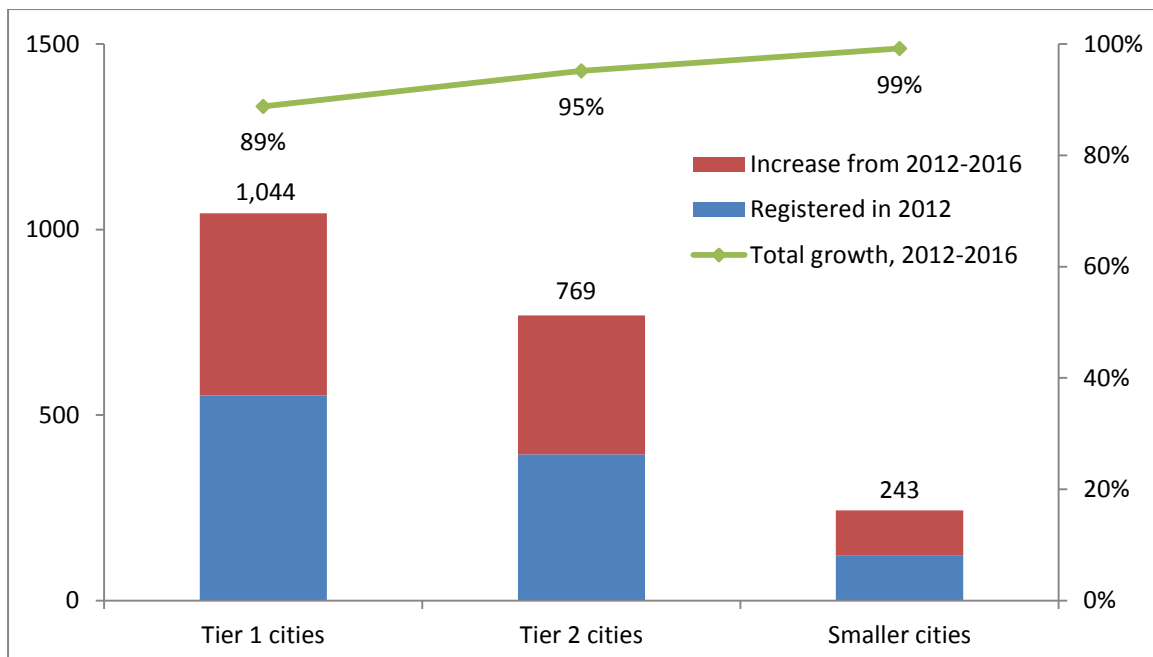
Source: British Council, 2016

It should be noted that the above chart does not perfectly match with student numbers from each city. It is common for agents to also handle students from nearby cities in the region, or even to operate across the whole country. However, with the possible exception of Beijing which hosts many nationally-active agents, the number of registered agents is still an important indicator as to the overall size of each market.

In general, the growth rate was slightly faster in smaller cities – Tier 2 cities saw an average 95 per cent increase in agent numbers from 2012 to 2016, compared to an average of 89 per cent for Tier 1 cities. Smaller cities grew faster still, doubling their agent numbers over the same period. However, the greater number of agents in larger cities means that the four Tier 1 cities still accounted for half of newly-added agents over this period, while most of the rest were in Tier 2 cities.

Cities seeing particularly fast growth included Suzhou, which more than tripled its number of agents from 2012 to 2016, as well as Tianjin, Kunming and Wuhan, which all saw growth well above 100 per cent over this four-year period.

**Figure 3.11: Registered UK summer school agents by city tier**



Source: British Council, 2016

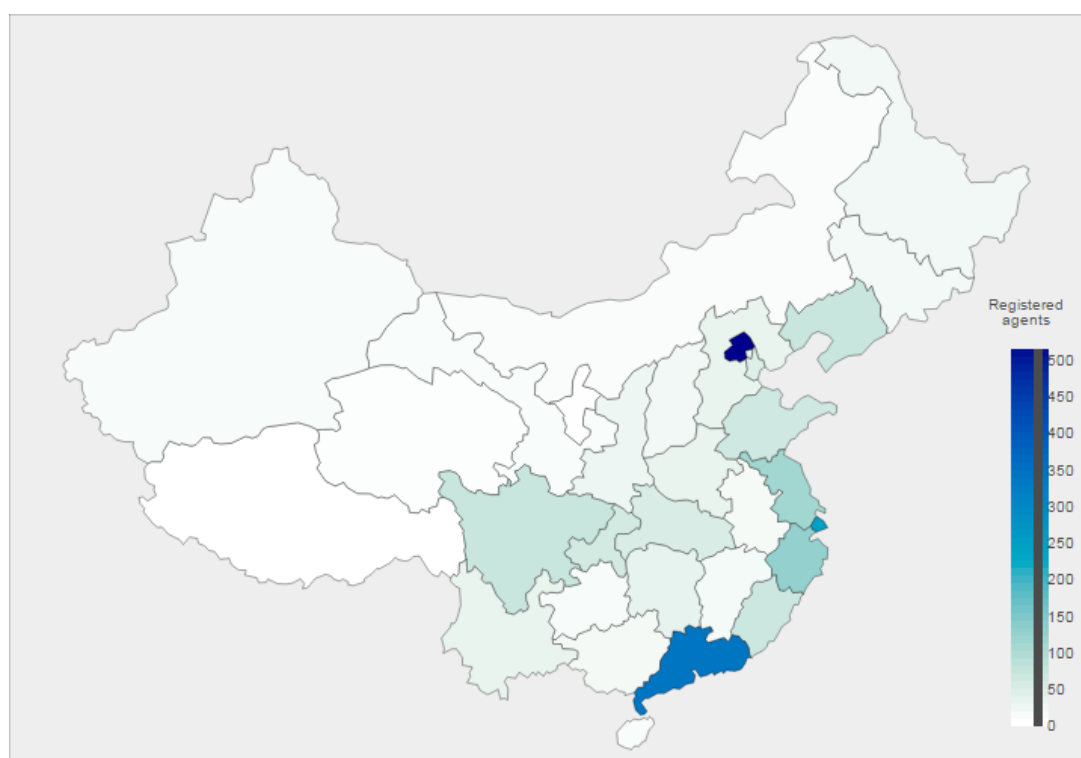
The picture from a provincial view is similar, with Beijing, Shanghai and Guangdong<sup>7</sup> accounting for significantly over half of all agents. Zhejiang and Jiangsu, both wealthy coastal provinces near Shanghai, each also have over 100 registered agents, while Sichuan, Liaoning, Fujian, Shandong and Chongqing each have more than 50.

Excluding provinces with a very small number of agents<sup>8</sup>, the fastest-growing major provincial markets over the last 4 years were Shandong, Tianjin and Yunnan respectively, but as with the cities the majority of the increase in total agent numbers came from the current top provinces.

<sup>7</sup> Beijing and Shanghai are directly-governed municipalities with the same status as a province. Guangdong is the province containing both Guangzhou and Shenzhen.

<sup>8</sup> Jiangxi and Gansu saw faster growth in percentage terms, but each accounts for less than one per cent of total agents so this is likely due to random variation.

**Figure 3.12: Registered UK summer school agents in mainland China by province**



Source: British Council, 2016

According to numbers provided in the agent survey, the main single region for student recruitment is East China, an area that includes Shanghai as well as Hangzhou and three other cities in the Top 20 list. This contrasts somewhat with the agent numbers, perhaps because many agents in Beijing cover the whole country while those in Shanghai concentrate on that city or the surrounding region. Surveyed agents also reported a larger number of students coming from South China than from the North China region, which includes Beijing.

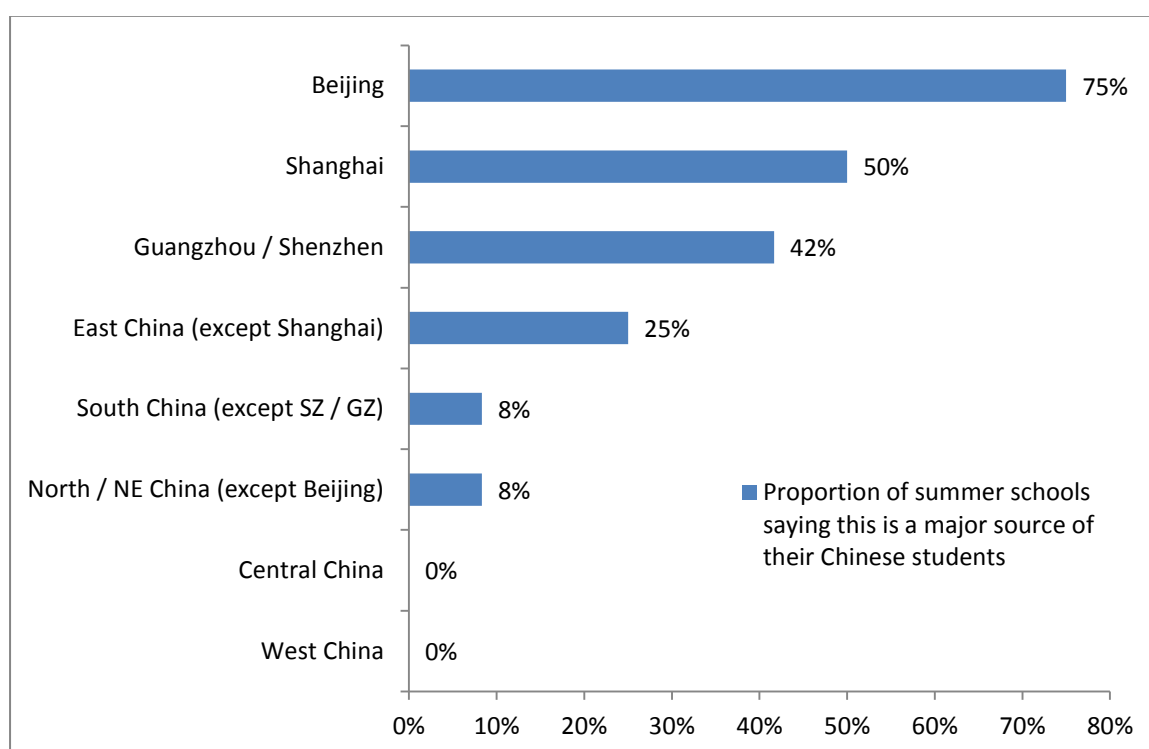
Regional growth in existing agents' student numbers was also investigated in this survey. According to surveyed agents, those operating in the South and East China regions tended to be experiencing slower growth. The majority of agents recruiting students in the North China and West China regions, as well as those operating across multiple regions, saw moderate to strong growth in student demand (5 per cent or higher) in 2015. However, responses from agents operating in the East or South of the country were more mixed – although they were more likely to see growth than decline, the median agent in these regions saw little to no increase in their 2015 student numbers.

Interviews with UK summer school providers reinforce these findings. In the words of one major summer school operator, “Tier 1 cities are very much the majority [...] other areas are growing but still definitely a minority”. Other schools generally made similar comments, saying that the bulk of their students came from the most developed parts of China, particularly the four Tier 1 cities and wealthy cities in East China such as Hangzhou.

UK summer school providers were also surveyed regarding the areas where their Chinese students typically come from. Among the 12 respondents that were able to answer this question, two thirds named only Tier 1 cities, while only one did not include these cities in their main student sources.

Among these Tier 1 cities, the largest market was Beijing, which was mentioned by three quarters of all respondents. Meanwhile, a significantly larger proportion of summer schools said that smaller cities in East China were a major student source in comparison with other regions. The only institution that did not name a Tier 1 city said that their students mainly came from cities in the East of the country.

**Figure 3.13: Major sources of Chinese students at UK summer schools**



Source: British Council survey of summer school operators, 2017.

Base: All schools where the respondent named one or more major recruitment markets for Chinese students.

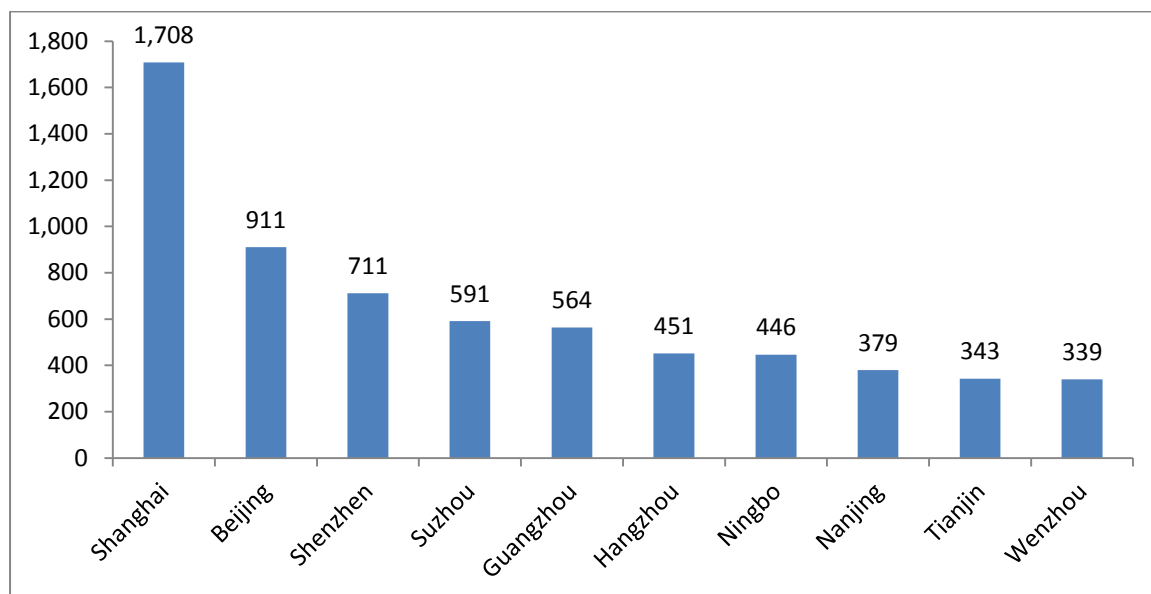
Based on these findings, Tier 1 cities appear to make up an even larger share of the Chinese student market for UK summer schools than their higher share of agents suggests. This suggests that there may be untapped potential in smaller cities that UK summer schools have yet to take advantage of.

One cluster of cities mentioned by some UK summer school interviewees was the Pearl River Delta region. Aside from Guangzhou and Shenzhen, other cities in this cluster – Dongguan, Foshan, Zhongshan and Zhuhai – were also mentioned. Although none of these cities individually hosted a large number of agents, the total number of agents in these four cities is 48, which would place the group 7<sup>th</sup> in the overall city ranking.



As students attending overseas summer school programmes typically come from relatively affluent families, the number of wealthy people in a city is a strong indicator of the potential market. Wealthy cities generally correspond with the major agent hubs but cities in Jiangsu and Zhejiang provinces, particularly Suzhou, tend to rank higher in terms of wealth than they do in terms of registered agents. This may be because they are close to Shanghai and so Shanghai-based agents take a large share of their local markets.

**Figure 3.14: Individuals earning over 100,000 RMB by city, 2015 ('000)**



Source: Economist Intelligence Unit, 2016

The type of course attended by students from different parts of the country also varied, according to some agents. One agent with branches in different parts of the country said that parents from Guangdong are “more sophisticated” in comparison to those in North China. Another interviewee commented that although South China was their largest source of summer school students, this was reversed in winter programmes, when students from Guangdong “basically don’t go abroad”. In comparison, students from northern China are much more likely than their southern counterparts to go abroad around Chinese New Year in late January or early February. It is unclear whether this was for cultural reasons or simply because of the weather.

Most interviewees did not note any significant differences between students from Tier 1 markets and those from smaller cities. Students and parents from focus groups in Beijing also gave similar opinions to those in Chengdu. One agent said that around five years ago there were major regional differences in parents’ awareness of summer school programmes, but now they are well-recognised throughout the whole of China. However, another interviewee, an agent operating across multiple provinces, commented that customers in South China were “more sophisticated” in their choices, as well as being more interested in study abroad in general compared to northerners.

## 4. Student and parent demands

### 4.1 Decision makers and information sources

The decision to attend an overseas summer programme is generally a joint decision between the student and their parents. However, focus group findings show that the parent is more often the primary decision maker.

This is particularly true for younger students, but even among the high school age group (15-18) there were several examples of programmes being strongly encouraged by the parents despite the child being less keen. Two parents in separate focus groups mentioned that they had wanted their son or daughter to go abroad in the past but eventually backed away from these plans because the child did not agree. Students themselves mostly felt that they had been an important part of the decision but in many cases the idea had been mainly driven by their parents. One student in particular commented that they had attended a programme because their parents insisted, despite not being particularly eager to go abroad.

When asked about the initial idea to attend a summer school, there appeared to be two main sources: programmes promoted through the student's school or language class, and positive experiences of friends or family (typically coming via the parent). Some students also commented that their friends had planned to go on such a programme and had encouraged them to come together.

A recent Ipsos / New Oriental report, discussed in the previous section, had slightly different findings. Their survey found that the largest group of respondents (44%) said the student themselves was the main influencer, followed by their parents (33%) and classmates, teachers and family friends.

When choosing a summer school programme, participants did not appear to be particularly well-informed customers. Most focus group participants said that they did not do a large amount of research before choosing a programme, and only a minority of parents said they looked for information online. Students also seemed to have little involvement at the research stage, instead choosing from a few options suggested by their school or parents. However, a handful of agents did mention that parents were becoming increasingly informed and increasingly likely to research the courses online.

Trust in the programme operator was seen as extremely important. Parents tended to send their children on programmes through their school or through an agent linked to a language class the child already attended.

One parent expressed a typical opinion by saying "I don't trust online sites, the information is too commercial [...] it's better to go through [the child's] school". This was true even though the parent knew that the school's programmes were arranged through third-party operators.

Most participants said that they chose from a limited list of offered programmes rather than looking elsewhere for the most suitable programme. Among those that went

through agents, the majority chose the agent based on friends' recommendations and then chose a programme from those represented by that agent.

Aside from schools and agents, the main information source was family friends who had previously sent their children abroad on summer school programmes or were considering doing so. The main online information source was social media posts shared by these friends.

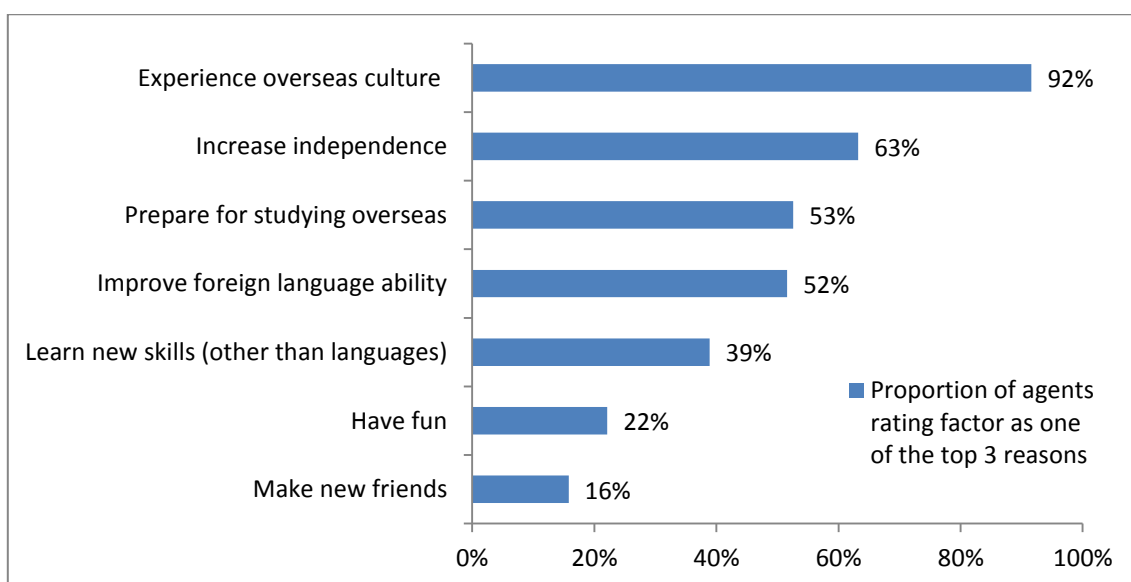
#### 4.2 Reasons for attending overseas summer school programmes

When asked about the main reasons why students or their parents chose to attend overseas summer school programmes, agents overwhelmingly chose experiencing overseas culture as one of the most important drivers. This factor was selected as one of the top three factors by over 90 per cent of agents in the quantitative survey.

This was backed up by findings from in-depth interviews and focus groups. One interviewed agent commented that students viewed UK culture particularly favourably but even those going to other destinations saw the "overseas experience" as the main attraction of overseas summer schools.

Aside from this, the factor cited as important by the next largest number of agents was to increase the students' independence. This was particularly true among younger age groups; in comparison, agents aimed mainly at university students did not see this as a very important factor. Preparing for studying abroad and improving foreign language skills were both also cited by slightly over half of surveyed agents.

**Figure 4.1: Agents' perceptions of main reasons for attending programmes**



Source: British Council, 2016

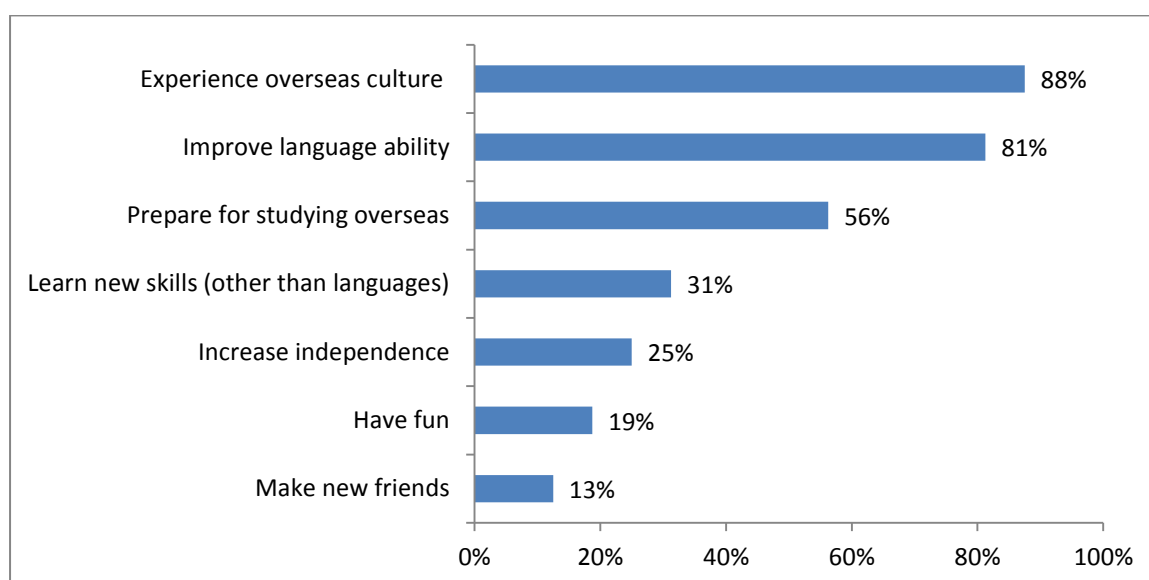
In most respects, UK summer school operators' perceptions of this issue agree with agents. In particular, UK summer school operators also agree that experiencing overseas culture and increasing students' independence is an important goal for

Chinese students heading to the UK. All interviewees and almost all survey respondents saw the cultural experience as one of the most important parts of the programme.

Tourism is seen as a particularly important driver for Chinese students in comparison to other nationalities. Several operators commented that this was likely because of the distance between China and the UK – in the words of one, it is seen as a waste to “go to the UK and not see everything”. Chinese summer school students’ attitudes towards tourism are discussed in more detail in the next section of this report.

However, there is a noticeable divide on the issue of language ability. More than four in five summer school operators think that improving their English ability is among their Chinese students’ main reasons for attending an overseas summer school programme, while only half of Chinese agents say the same thing. In contrast, agents were much more likely to say that students (or their parents) saw increasing independence as important, while only a quarter of UK survey respondents agreed.

**Figure 4.2: UK summer school operators’ perceptions of main reasons for attending programmes**



*Source: British Council, 2016*

This difference in perceptions might suggest that some UK summer school operators see language as more important than it is in reality. An agent commented that students “would love to improve their language” but that this is not the main purpose of the course due to the large cost of travelling to and staying in the UK. In interviews some UK summer school operators agreed, with one commenting that, although language classes are an important part of their offering, “it’s never really about language”.

Nevertheless, all interviewees agreed that language learning was an essential component of overseas summer school programmes. A representative of another UK language school said that Chinese students tended to be “more serious about language”

than students from other countries, and all interviewees said that language was an important part of the overall experience.

Preparing for overseas study is another very important driver, particularly for older students. School operators and agents report that university ‘taster programmes’ are becoming increasingly popular. A large proportion of Chinese summer school students are interested in studying overseas at some point in the future – previous research by Ipsos and New Oriental found that 83 per cent of short-term overseas study participants were at least considering longer-term study abroad.

Findings from focus group participants, including both parents and the students themselves, back up these perceptions. The consensus across all groups was that experiencing overseas culture was very important, with most participants seeing this as the main reason to go abroad. This was particularly true of parents, with one parent in Beijing illustrating the general opinion by saying “I want my child to be a more international person”. This parent had studied a postgraduate degree abroad and thought that gaining an international perspective at an earlier age would be even more valuable for their child.

Other factors mentioned by parent focus groups were also in accordance with agents’ expectations. Increasing children’s independence or confidence was seen as an important secondary reason for many parents, while several saw it as a way for their children to experience overseas education with a view towards studying abroad for longer periods in the future. The latter opinion was not only expressed by parents of older children; those with children at lower secondary age or younger were also likely to mention the potential for studying overseas at the university or even high school level.

Language was mentioned in all groups, but usually as a secondary reason rather than the main purpose of the programme. One parent commented that language study had been the most important factor the first time they sent their child to an overseas summer school, but on later trips they saw other activities and making friends as more important. Nevertheless, parents all agreed that it was important to have a language learning element to the course.

The most common opinion among students was also that experiencing overseas culture was the most important, but their other opinions were a little different from parents. Some saw having fun as the most important reason for going abroad, while in comparison to the opinions expressed by parents, students were more likely to say that language study was their parents’ main aim in encouraging them to go abroad.

A few students were also more cynical, with one saying that their parents sent them abroad because “they wanted to get me out of the way” over the summer. This factor was not independently mentioned by any parents but some agreed that this was also a motivating factor when it was suggested by the focus group moderator.

Information gained from interviews and focus groups was similar to findings from previously published studies. The 2015 Ipsos / New Oriental research found that the

most important reason why Chinese students attend overseas short-term study programmes was to “expand their horizons”, followed by improving language skills, increasing independence and to experience Western culture.

**Figure 4.3: Decision makers’ stated reasons for short-term study abroad**



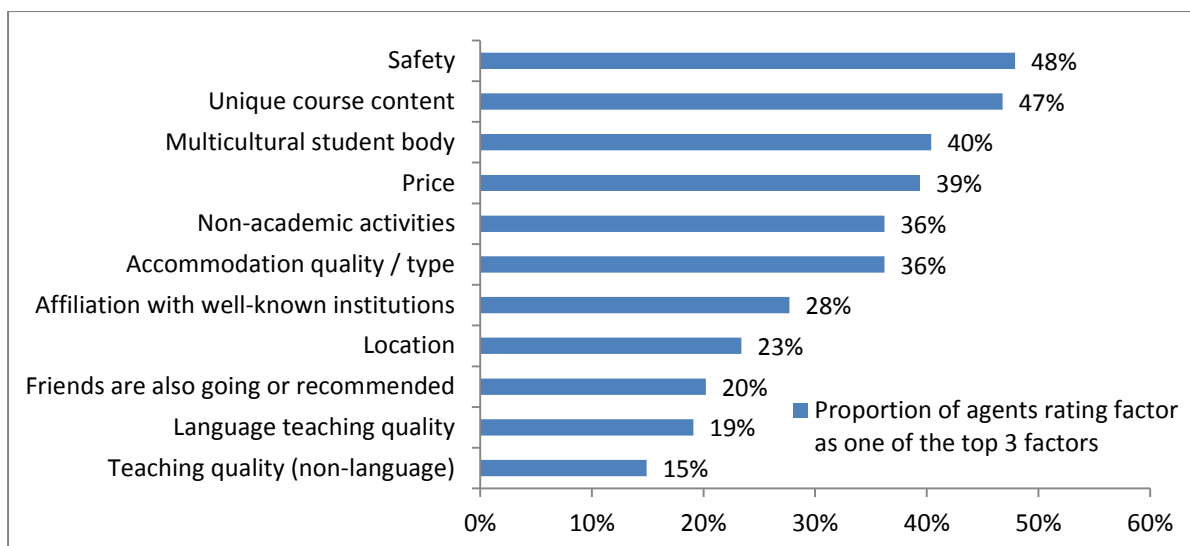
Source: Ipsos / New Oriental, 2015

### 4.3 Important factors when choosing programmes

As discussed in previous sections, parents tend to choose from a limited list of programmes offered by a trusted agent or organisation rather than shopping around from a wider range of options. However, agents also report that parents are becoming increasingly picky when choosing a programme, asking more questions about factors such as teaching quality, location and the proportion of Chinese students.

There was not an overwhelming consensus from agents about their customers’ most important factors. No individual factor was described as among the three most important by more than half of respondents. The closest to this mark was safety, cited as a top factor by 48 per cent of agents. Unique course content was also seen as important by 47 per cent, followed by a multicultural (i.e. non-Chinese) student body and the price of programmes.

**Figure 4.4: Agents’ perceptions of main factors in choice of programme**



Source: British Council, 2016

Similarly, although there was some overlap in interviews with UK summer school providers and student and parent focus groups about which factors were the most important, there was not a strong consensus across all sources. Attitudes about particular aspects are discussed below.

#### 4.3.1 Safety

As shown in the chart above, this was rated as the most important single factor by agents. This was seen as an important advantage of the UK, particularly over the US. During interviews, agent and summer school interviewees also commented that recent terrorist attacks in Continental Europe had had a negative impact on the summer school market globally as well as for France and Germany in particular. As focus groups took place before the recent string of terrorist attacks in the UK, the country’s attractiveness in this regard is likely to have decreased.

Safety was seen as particularly important by parents in focus groups. All parents agreed that safety was very important, with many describing it as the most important part of their decision or saying that it was “the most basic condition” for sending their children abroad. Some parents of younger children commented that they did not know enough here and would appreciate additional information on areas such as the ratio between students and supervising adults during activities. Students themselves were much less likely to describe safety as one of their most important factors, although when asked they did agree that it was important.

This factor was also described as a significant advantage by an interviewee representing a summer school programme run by a UK boarding school. The programme’s background means that parents see it as more secure compared to language schools and homestay programmes.

One UK summer school operator spoke of the strong effect that safety can have on their brand, even if the cause is outside their control. They discussed an event where a Chinese student was involved in a traffic accident while in the UK, which “really hurt the

brand”, especially with the agent that sent the student. This suggests that diversification is important – if the agent had relied entirely on that single agent, the event could have had an even more severe effect on total recruitment.

Another summer school operator discussed how high-profile events can affect the number of outbound Chinese students to all programmes. Aside from the terrorist attacks mentioned above, an accident such as a plane crash involving study-abroad students will depress the number of students the next year. This effect can also apply at more local levels – the interviewee mentioned an event where summer school students from a certain province were killed in a traffic accident and as a result, the number of students going abroad from schools in that province dropped precipitously. According to this interviewee, this effect is typically limited to the following year and student numbers rebound the year after.

School tour groups are often particularly sensitive to safety concerns, as the school is seen as responsible for the students they take abroad and so tends to be more conservative about risk. Since the recent terrorist attacks in London and Manchester in April – June 2017, agents reported that some school groups have cancelled planned summer programmes in the UK, although this is not the case for the majority of groups. As discussed above, this is likely to also have an effect on perceptions of the UK next year but the long-term impact will probably be limited unless there are further incidents.

#### **4.3.2 Course content**

As discussed in Section 3.2, “language plus” programmes, incorporating language learning as well as activities and tourism, are currently the dominant form of overseas summer camp. Several parents and students discussed the importance of language learning as a key component of the programme and in some cases there is a strong belief that this is the most important part of the course. One parent said “if it’s just tourism, we can do that ourselves”, while another said “if it wasn’t for the language, why would we send [our children] abroad?”.

Several agents reported that parents are paying increasing attention towards the quality of courses and to the UK school offering these courses, and are increasingly likely to research the school online to find out more about its reputation. This reputation covers not only the teaching quality itself but the overall experience, including the homestay environment and the student mix.

As children get older, parents appear to be more interested in the academic aspects of the course. In comparison, classes for primary-age students are seen as less important, with enjoyment being the most important aspect from a parent’s point of view whilst the course content is less of a priority.

Agents and summer school operators both pointed out that parents’ demands are both increasing and becoming more diverse. Various agents commented that specialised programmes are becoming more popular, saying that “courses with a particular theme find it easier to attract parents’ and students’ attention” or “programmes with a particular theme are growing more strongly”. Meanwhile, one agent said that courses



which replaced some afternoon activities with subject learning were rising in popularity. Knowledge of this type of programme was usually quite low among focus group participants, but parents and students in all groups expressed an interest after the concept was raised.

There is a perception among some agents that UK summer schools are falling behind in terms of the variety of courses offered, although not all agreed and one mentioned the diversity of courses as a positive selling point for the UK.

There are also some negative factors for specialised programmes. Some students wished to go abroad with their friends and weren't interested in programmes that didn't cater to everyone. Others had enjoyed previous non-themed language plus programmes and wanted to continue attending similar programmes in the future.

Some parents, especially of primary-age students, said that course content was not as important as experiencing overseas culture and so they had no particular preference for themed programmes. In general, themed programmes were more popular in the older age group as well as for students who had already studied abroad on a summer school programme.

For older students, university-linked experience or taster programmes are often very popular. According to focus group interviewees, the most important factor when choosing such a programme is also the course content, with students interested in programmes related to the courses they plan to study at university. The prestige of a university partner is also important for these students.

#### **4.3.3 Location and visits**

Location was mentioned as a very important factor by a number of agents, focus group participants and summer school operators. This is also often one of the most important decision factors for the students— especially younger ones – in cases where parents research different suitable options and allow students to choose between them.

The presence of major cultural and tourist attractions near the programme location was seen as an important factor by all parties. Tourism is seen as a particularly important driver for Chinese students in comparison to other nationalities and in the words of one summer school operator, Chinese students “want to see everything”.

This gives summer schools in London a particular advantage, although other parts of the UK, particularly Oxford and Cambridge, are also popular among some parents. One interviewee based in Scotland commented that their school sometimes cooperated with partners in London to provide programmes for students who felt that the city was an important part of the UK experience. On other occasions their programmes ended with an extended visit to the capital over several days, with students flying back to China from London.

This leads to a very strong demand for tourist visits which some UK summer school operators see as excessive and counterproductive. According to one operator, although Chinese parents often demand extended visits to many different places, their children

“don’t always get much out of it” and would rather be enjoying other activities. Another commented that tourist visits were not the “core value” of a UK summer school programme, and that they do not see themselves as being in competition with tour operators who can offer this for a much cheaper price.

Summer school operators’ response to this pressure varies. Based on interview findings, the majority suggest that it would be better to spend less time on tourist activities but ultimately have to compromise with their Chinese partners to meet customer demand. One interviewee insisted on their own programme design but this interviewee represented a popular programme at a well-known British boarding school and therefore had more bargaining power relative to agents. The negative aspects of this preference are discussed further in Section 6.1.

Focus groups also showed the importance of this type of tourist visit, with parents commenting that this was essential to the cultural aspect of the programme. However, several parents stressed that the importance of these visits was the cultural context.

Parents feel that summer school programmes should properly explain the importance of places they visit and the people running the visit should have a good understanding of this. In the words of one parent in a focus group, “it shouldn’t just be like going with parents”. Similarly, an agent mentioned that students expect “high quality excursions” rather than simply a visit, and “expect more explanation about the area they are visiting, including the history and culture, from a native British person”. Another agent commented that “some of [the students] have already been in the UK a few times, and maybe toured with their parents, so that means they want something more and in-depth”.

Several interviewees commented that parents’ demands in this area were increasing over time. This may be a result of Chinese independent tourism becoming increasingly common – as many participants may already have visited the UK before, some added value is required.

Another extremely important factor in the choice of location, brought up in almost all the student and parent focus groups, was novelty. Among students who had been to an overseas summer school before, more than half said that they would prefer to go to a different country in future years. This was not because they disliked their previous destination but because they wanted to experience something new. This finding is not surprising given that the top reason for going abroad was to experience overseas culture and that tourist activities are seen as an important part of this experience.

According to some agents, locations for overseas summer programmes are becoming more diverse, both in terms of country and in terms of region within the UK. Summer programmes in nearby countries such as South East Asia are becoming “more and more popular”, while parts of the UK other than London are also becoming more popular.

#### **4.3.4 Activities**

Focus group participants agreed that the presence of non-academic activities is important but most seemed to have few specific demands. Some participants expressed

an interest in programmes offering activities that students would not have experienced in China. One parent mentioned horse riding as such an activity, while ‘cultural activities’ were also popular. When the concept of programmes with a particular theme was introduced, this had a positive reception (as discussed in Section 4.3.2).

On the topic of the non-academic activities their course offered, a UK summer school provider commented that activities such as music and drama don’t initially act as major drivers for parents but that they play an important role in making the course successful once students have arrived in the UK. This is particularly true for Chinese students who tend to find it more difficult to communicate with their counterparts from other countries and need this opportunity to make new friends.

Students and their parents had differing opinions about unstructured activities. Parents generally preferred more structured activities, with one asking “what’s the point in paying a lot of money to go to the UK if they’re just going to be playing football with friends?”<sup>9</sup>. On the other hand, one student said that they would prefer “less formally-organised activities, and more time to relax and have fun with other students”, while another said that the most memorable aspect of their summer camp in Cambridge was free time spent in the city.

#### **4.3.5 Accommodation type**

Opinions on homestay as opposed to other kinds of accommodation varied greatly, with opposing opinions expressed in different focus groups. The cultural experience of a homestay is valued but some students felt uncomfortable living in a family home in the UK and some parents worried about safety.

According to agents, a homestay is the most popular accommodation option but some agents also mentioned that parents are concerned about this. Nevertheless, one agent commented that most parents think a programme without a homestay would be little different from a course in China. In this sense, the English speaking environment provided by a homestay is seen as an important advantage.

One agent mentioned that parents worry about the friendliness and trustworthiness of the host family, while another said that expectations are rising and that a homestay in the UK still falls short of the experience in other countries, particularly Australia, New Zealand and Scandinavia. A summer school provider offering programmes in the UK as well as other countries had a similar opinion. In their experience, host families in the UK “treat it more like a business” and are not as friendly as those in the US or Australia. London was described by more than one agent as having particularly poor homestay options.

From the point of view of UK summer school operators, homestay is also the most popular option. Not only do Chinese parents “really see the value of immersion” to a greater degree than those from most other countries, but the lower price is also an attractive factor. On the other hand, one UK school discussed potential problems with

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<sup>9</sup> It must be noted that this was an extreme opinion and other parents disagreed with it. However, the general trend of parents preferring structured activities was very apparent from other parents as well.

homestays, saying that Chinese students tend to have high expectations of standards and that some are unfamiliar with the UK's diversity and can be surprised to be placed with a non-white family. Aside from these two aspects, the other issues they experience with homestay providers are not specific to Chinese students.

#### **4.3.6 Price**

Almost 40 per cent of agents rated price as one of the top three factors when Chinese students or their parents are comparing overseas summer school programmes. One agent commented that prices for these programmes were decreasing as more players enter the market.

However, most UK summer school providers saw Chinese customers as more price sensitive compared to other countries. One interviewee commented that price was the most important factor for Chinese students, while another commented that Chinese agents' demands for price and quality were sometimes in conflict.

Nevertheless, this does not mean that there is no demand for high-end programmes from China and one interviewee representing a very high-end programme said that they saw strong demand from Chinese parents. Focus group participants generally said that, although price was important, this was not the main factor and they were prepared to pay more for a better-quality programme. It is not clear how close this was to their real behaviour.

#### **4.3.7 Availability through a trusted partner**

As Section 4.1 explains, the majority of parents do not shop around or do extensive research on different types of programme. Instead, they prefer to rely on a particular trusted channel – either programmes promoted through their child's school, through an after-school language class the student attends, or through a trusted agent referred by a friend.

Some parents said that they would only consider other options if this partner didn't provide an option they felt was suitable, while others said that they did not trust other channels at all. In some cases, misconceptions are promoted through an over-reliance on one channel. One parent commented that they did not send their child to the UK because "the UK only has homestay programmes". In fact this was only the case among the very limited range of courses offered by a single agent, but they believed that this was true across all UK summer school programmes.

As a result, for most customers programmes are often not competing against all other options in the market but against the set of programmes promoted by a particular partner. Just as safety was described as "the most basic condition" for considering a summer school programme, another essential condition for many parents is that the programme is offered by an agent or organisation the parent trusts.

This is a particularly important factor in the first overseas programme a student attends. Several focus group participants commented that they planned to choose (or had already chosen) a programme offered through a partner they already trusted the first

time they sent their child abroad, but then chose an agent with a broader range of programmes in following years.

#### **4.3.8 Student diversity**

As with customers from other countries, Chinese parents care greatly about the mixture of nationalities involved in summer school programmes. Opinions differed on the maximum acceptable proportion, but as a general rule, the fewer Chinese students the better. According to interviewees, parents from mainland China see Hong Kong and Taiwanese students as Chinese rather than as contributing to diversity, while they would prefer to study with students from Europe.

According to one interviewee, this is a particularly important factor for larger school groups, perhaps because they will be contributing a large number of Chinese students themselves. Aside from summer programmes, this is an even more critical factor during the Chinese New Year period, when many Chinese people travel but students from other countries tend not to go abroad.

According to focus group findings and some agents, there is also a very strong preference for joint activities with local UK students of the same age – especially as part of a school immersion. This was mentioned independently in all parent focus groups on the basis that interaction with local students will help develop students’ language ability as well as their cultural understanding of the UK. This immersion is also seen as a key advantage of homestay programmes. However, there are few local programmes of this sort available on the market, which is seen as a negative factor by many parents.

#### **4.4 The UK’s advantages and disadvantages**

The UK has several key advantages over competitors. One of the most relevant is the country’s history and cultural background, which was mentioned by several summer school providers, agents, parents and students. As discussed in previous sections, tourist visits play an important role in Chinese students’ summer school choices so the UK’s large number of museums and famous landmarks puts the country at an advantage.

Less directly, interest in UK culture helps to raise the level of awareness Chinese people have of the UK. Positive stereotypes of people from the UK also play a role here, particularly in terms of students’ own interest in the country. One student commented that “people’s cultural level is higher” in the UK, while more than one said that “British gentlemen” were a major advantage of the country.

Safety was seen as the UK’s second major advantage by agents and the biggest advantage by parents in focus groups, particularly over key competitor the USA. However, as discussed above, interviews and focus groups took place before the recent terrorist attacks in London and Manchester which is likely to have made the UK appear less safe to Chinese parents. Safety is also an area where parents said they would appreciate more information.

The third of the three most-mentioned advantages was the UK's reputation for high-quality education and modern teaching methods. In addition to high regard for UK summer school programmes themselves, the strong reputation of the UK's universities and schools is also important. As mentioned in Section 3.4.2, a large proportion of students or their parents are interested in studying abroad in the future – according to a survey by Ipsos for New Oriental, over 80 per cent of students participating in short-term study abroad are at least considering this, although the proportion that eventually decide to study abroad is likely much lower. Due to the role of summer school programmes as a preparation / taster for future overseas study, demand for UK universities has a strong effect on the popularity of the country's summer schools.

Aside from these three main factors, other advantages were mentioned by some interviewees. The UK's history as the home of “standard” British English was valued by some parents, who see this as a major advantage in language study. The country's relatively small size was seen as an advantage by others, who feel it makes it easier for students to visit major locations across the country in a single trip.

The UK's geographical location was also an advantage for two different reasons. On one hand, it means that it is easier for students to visit mainland Europe as part of their visit to the UK (according to this interviewee, programmes that combine a traditional summer school programme with extended travel are increasingly popular). On the other hand, this means that UK summer schools have a more diverse (and specifically less Chinese) mixture of students, which is highly valued by Chinese parents.

Finally, the recent drop in the value of the pound was cited by several people as an advantage for the UK as it means that programmes will be relatively cheaper in Chinese currency terms.

The UK also has a number of disadvantages. Despite the currency drop, it is still seen as an expensive option, especially compared with closer study destinations. At the same time, although the UK's culture is seen as attractive by many students, others find the US more interesting and prefer to go there instead.

The UK's tough visa environment was also seen as a negative factor by several interviewees and focus group participants. Although no interviewees reported serious problems in receiving visas for summer school programmes, agents and focus group participants commented that this makes the UK less attractive as a potential university study destination. This means that students interested in long-term study abroad are more likely to be interested in sampling the university experience in the US or Australia rather than the UK.

As mentioned in Section 4.3.5, several sources suggest that UK homestay options are not seen as comparable to those in competing destinations. Some insiders see UK families as treating homestay “more like a business” compared to those in the US or Australia.

Another significant negative factor for the UK, according to several interviewees, was a relative lack of variety of programme options. As parents and students tend to be drawn to unique programmes, this makes them more likely to choose major competing destinations rather than the UK. This is particularly true in the younger age group, with the UK described as having a much narrower range of programmes for primary-age students.

Finally, two perennial negative stereotypes of the UK – bad food and bad weather – made an appearance across several different focus groups. One UK summer school provider had taken particular steps to address the food issue, including providing more hot meals at lunch time rather than packed lunches and providing a sweeter and softer type of bread more in line with Chinese students' tastes.

#### **4.5 Unmet demands**

The main unmet demand mentioned by both parents and agents was for a wider variety of programmes aimed at younger (primary-age) children in the UK. Parents and agents both talked about a lack of options here, with several agents saying that expanding the age range would be their top suggestion for UK summer school operators. From a different angle, one UK summer school provider offering programmes for the younger age group said that they saw a lack of competition in this segment. This is also the fastest-growing part of China's overseas summer school market, meaning that there will be more demand for this sort of programme over the next few years.

There is also an unmet demand for programmes involving local (i.e. UK) students. Many parents hoped for school immersion programmes while others only mentioned activities with local children. This sort of programme would be valued highly by parents as it would promote both English language ability and cultural awareness. Parents of children of all ages mentioned this as one of their unmet demands but agents see more demand for this in the high school age range.

An agent commented that there is a lot of potential to work with private schools in the UK to develop this sort of programme, while it would be harder for language schools to develop in this area. Another said that there was a lot of untapped potential for in-term programmes (rather than summer schools) in this area.

One parent with a younger child also expressed interest in parent-and-child programmes, which they could attend along with the student. Although some such programmes exist, this focus group participant said that the selection was too limited. However, it is not clear whether there is really significant unmet demand for this type of programme.

Some parents in focus groups mentioned that they would prefer more information on aspects related to safety as well as in areas such as accreditation. As parents were not aware of existing accreditation schemes, this suggests that Chinese agents do not

always pass on this information to their customers, and it could be valuable for UK summer school operators to be more up-front about these issues.

One parent from Chengdu, a major city in South West China, complained that many UK study tours set off from Beijing rather than from a destination that was closer to them. Although this may be more the domain of the Chinese partner rather than the UK summer school, it suggests that there may be more scope to work with agents in second-tier cities rather than focusing on those in Tier 1 markets.



## 5. Marketing and agent relationships

### *5.1 UK summer schools' priorities in agent relationships*

Most UK summer school providers rely on agents for all or nearly all of their Chinese business. According to interviews with UK providers, although many recruit students directly through their websites they do not have the capacity to support all students through the process of preparing to come to the UK, and agents therefore provide a valuable service. One agent illustrated their value by discussing a customer who had intended to book a course directly through the UK provider but had eventually decided to use the agent's services due to their professional group leaders, visa support and competitive price.

It is typical for both summer schools and agents to have multiple partners and exclusivity seems to be uncommon – no interviewed agent or summer school provider mentioned any formal exclusivity agreements. Some providers commented that this is sometimes requested by agents, but the providers had been unwilling to agree to this. One explained that rapid growth in agent numbers means that no one agent has an overwhelming market share in a particular region or field, which makes exclusive relationships less attractive. One interviewee did mention that they “try to avoid having more than two or three agents per province” and avoid promoting the same programme through more than one agent in a given city with the exception of the largest markets.

The strategies of summer school operators vary. In a survey of UK summer school operators carried out by the British Council in cooperation with English UK, several providers said they only worked with two or three Chinese agents but several others had 30 to 50 agents and one had as many as 200 partners.

Among these summer schools, the correlation between the number of agents and the number of students was very weak, especially for schools working with five or more agents. Operators with 5-10 agents did not recruit significantly fewer students than those with a higher number of partners. This implies that recruitment is largely driven by a few strong agent partnerships rather than a smaller number of weaker relationships and suggests that schools should focus more on building up key partnerships rather than simply trying to sign up a large number of agents.

According to interviews, larger agents are generally preferred, not only because they send more students but also because of their greater experience. As discussed in Section 5.2, one persistent problem reported by operators was the inexperience of group leaders sent by the agents; summer school operators said that this problem was particularly pronounced for smaller agents.

Relevant experience does not only mean experience with summer schools or the UK in general but also includes relevant experience to the summer school provider's location or courses. A Scottish interviewee saw this as particularly important, saying that they preferred agents who were more familiar with Scotland and understood its differences with England. This was seen as an important benefit when promoting their programme's

advantages. Similarly, schools offering certain types of programmes prefer agents that are more familiar with that programme type.

However, at the same time, one interviewed summer school operator said that one of their best partners in China was a travel agent with relatively little familiarity with the education sector. A major advantage of working with this type of partner is that there is less competition from other programmes the agent represents, with the interviewee's school having "basically a monopoly" on students coming to the UK through this agent. Similarly, size can also be a problem – an interviewee from a smaller language school commented that they would be unable to deal with demand from the largest Chinese agents, meaning that they could only work with smaller or medium-sized agents.

Market fit is also important. A high-end UK summer school provider discussed a recent shift in their agent strategy, aimed at concentrating more on agents who focus on more expensive programmes rather than "working with anyone who was interested". This was seen as a better way to focus their limited resources.

Other interviewees commented that expanding their number of agent partners was the most important priority. One said that "to be honest, we don't need to vet [summer school] agents as closely as we do for Tier 4 students" given the lower risks and that in general the most important requirement was that agents could provide students. This interviewee said that although preferred, agent accreditation was not absolutely necessary as long as the agent had satisfactory references from other schools and provided their company documents.

Aside from agents, some summer school providers had other partnerships in China. An interviewee from a UK boarding school described school partners – particularly international-curriculum schools – as their "favourite partners". This is partly because of similarities in culture, but also partly because their students were more likely to treat the summer school programme as a taster before enrolling as full-time students.

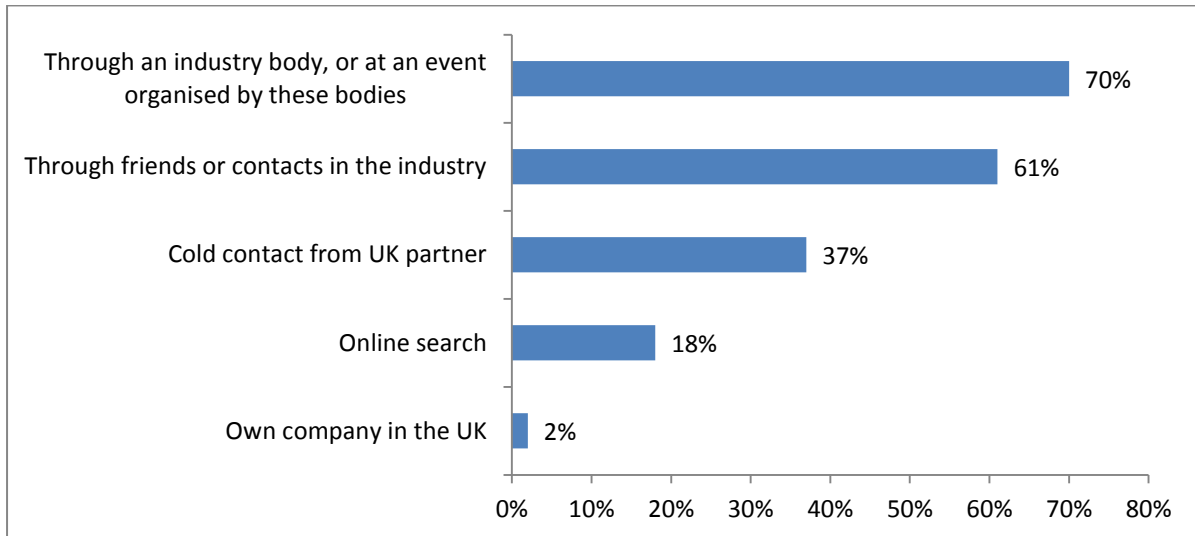
## ***5.2 Meeting new agents and building relationships***

Based on the survey, most Chinese agents use multiple channels to find UK partners. The single most common channel was through industry bodies, either directly or through fairs organised by these bodies<sup>10</sup>. However, two thirds of agents listed multiple channels and more than half said that they relied on their friends or contacts in the industry to help introduce them to suitable UK programme operators. Only a little over a third said that being contacted by the UK side was an important channel to build relationships and only one in 10 said that this was their only channel.

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<sup>10</sup> As the survey was carried out through the British Council's agent network, this might be somewhat overstated – agents with a closer relationship to the British Council might have been more likely to answer the survey and also more likely to attend these events

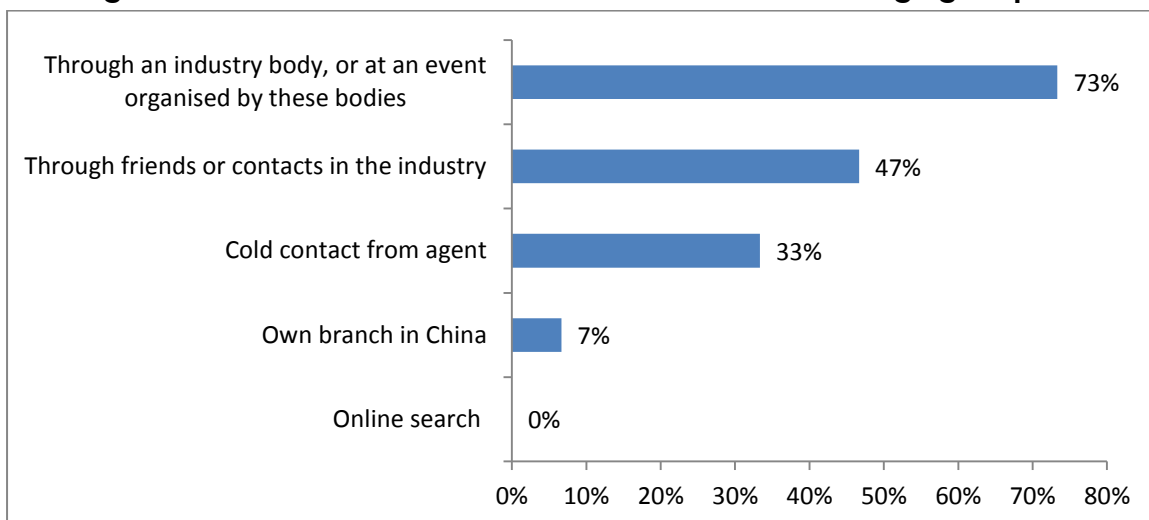
**Figure 5.1: Agents' main channels for finding UK summer school partners**



Source: British Council, 2016

Results from a survey of UK summer schools were relatively similar. Again, industry bodies such as the British Council or English UK, or events such as StudyWorld or the British Council roadshow, came out as the main way to meet new agents; this was followed by introductions through industry contacts. None of the surveyed summer school operators said that they searched for agents online.

**Figure 5.2: UK summer schools' main channels for finding agent partners**



Source: British Council, 2016

Several interviewees also stressed the importance of following up – in the words of one interviewee, “you can’t just meet them for 20-25 minutes, leave, then expect them to send you 100 students the next summer”.

This interviewee’s strategy was to use these networking events to meet a large number of Chinese agents, but not to try to set up cooperation with all of these potential partners. Instead, they used the initial meetings as a first step, then set up in-person follow-up meetings with likely prospects. They stressed the importance of these follow-

up meetings, not only to make sure that they properly understood the advantages of the programme but also to build a stronger relationship which would make the agent more likely to send students. A closer agent relationship also means that it is easier to work together and make compromises in order to design programmes that would be more appealing to Chinese students.

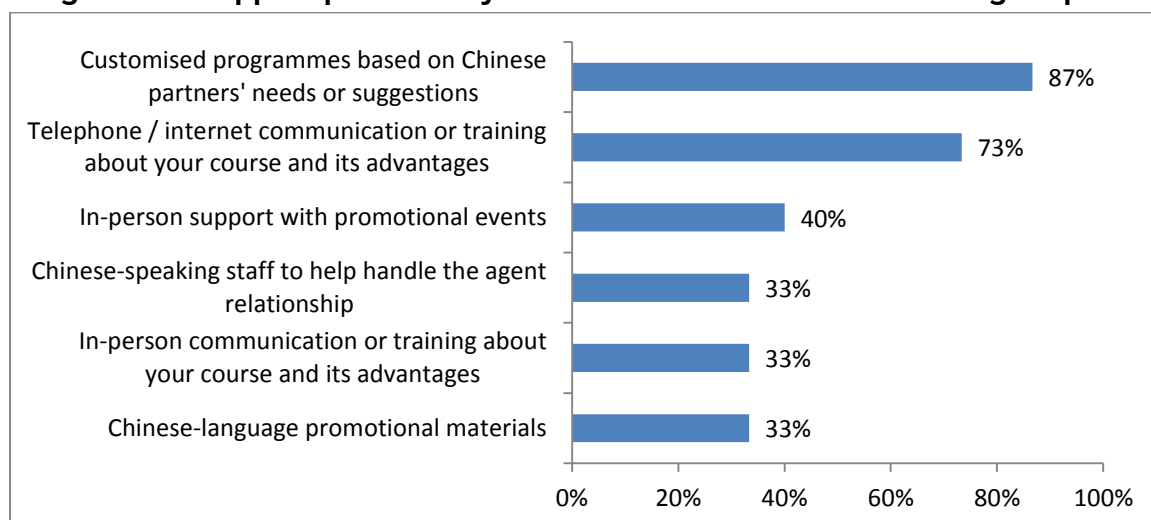
Some agents and summer school providers also mentioned that they had existing relationships with many of their partners before they started to offer summer school programmes. For example, one agent said that they had previously worked with UK language schools on adults' business programmes before moving to offer summer programmes with the same partners, while a UK boarding school mentioned other forms of cooperation with international schools in China.

### 5.3 Supporting Chinese agents

After the relationship has been established, interviewees discussed the importance of maintaining the agent relationship, with most either having China-based staff or making regular trips to China.

All interviewed providers said that they had regular online or telephone communication with Chinese partners and gave them promotional material about their programme contents. In China it is common for business communication to take place over instant messaging apps such as WeChat rather than through email and one interviewee mentioned that using these Chinese communication channels was important when working with agents. However, there was strong variation in the other types of support provided by UK summer schools to their Chinese agents.

**Figure 5.3: Support provided by UK summer schools' to Chinese agent partners**



Source: British Council, 2016

In particular, there does not appear to be a single most-popular model around sending staff physically to China. One UK interviewee commented that they provided no physical support as they “want [their agents in China] to be self-sustaining”. Another said that

they do not have the resources to justify in-person involvement in promotional events, although they did visit China to work with agents and build relationships. On the other hand, a different interviewee discussed the value of sending UK staff on a promotional trip each year to help support their agents' promotional events and said that the parents "want to see someone from the UK"; this helps persuade them to sign up<sup>11</sup>.

One of the most popular requests from agent survey participants was greater in-person support for marketing events from UK staff, with agents across different parts of the country and with different target customers all seeing this as the main way their UK partners could provide better support. An agent commented that in-person promotional support was more common with their US partners and mainly focused on high school programmes rather than lower levels.

Some summer school providers also have dedicated China-based staff. For larger operators this can involve a full China branch that handles promotion and support as well as agent relationships, but the option is also open to smaller schools. One interviewee discussed recruiting a part-time Chinese assistant on an ad hoc basis who helps maintain communication with agents as well as translating the school's brochure to Chinese and managing an account on WeChat (the dominant Chinese mobile social network).

Aside from staff based in China, it is also common for schools to employ staff with a Chinese background in the UK, which is seen as an advantage when communicating and building relationships with agents in China. According to one interviewee this is also seen as an advantage by parents during the programme.

From both the agent and UK perspectives, one of the most valuable forms of cooperation between summer schools and agents comes when designing programmes. Several agents expressed a desire for more input into programme design and one summer school operator said that willingness to make changes based on Chinese partners' input was one of their key advantages over UK competitors. This interviewee said that with open communication with Chinese partners it is possible to meet many of these requirements without compromising on programme quality. They also said that changes suggested by one Chinese agent are often welcomed by other Chinese partners and the students they send.

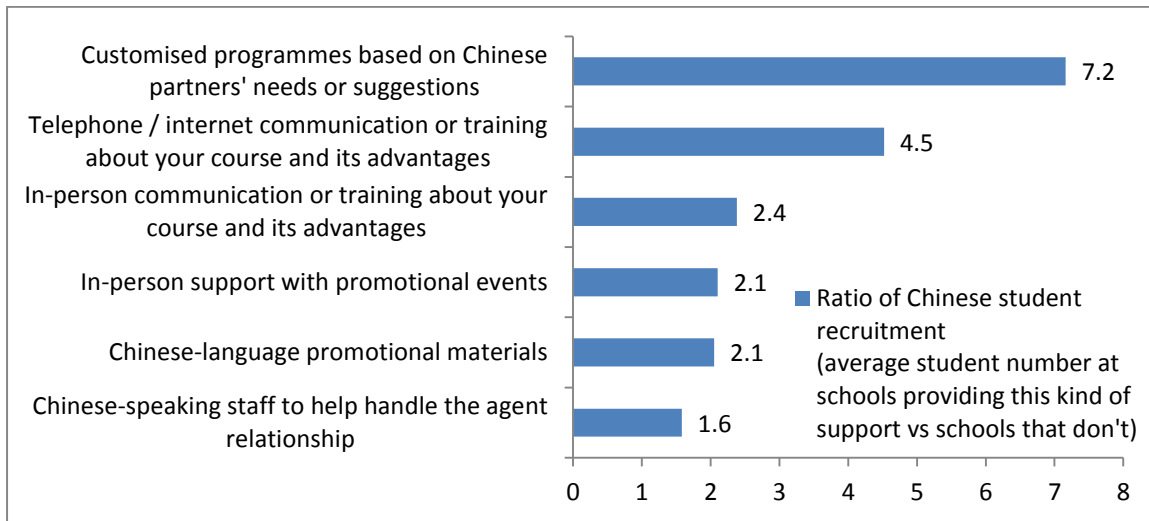
The chart below shows the ratio of Chinese student recruitment between surveyed summer school programmes which provide each kind of support to their Chinese agents and those that do not. As expected based on interviewees' experiences, customised programmes have the strongest impact. On average, schools that provided customised programmes based on Chinese partners' needs or suggestions recruited over seven times as many Chinese students than those that did not<sup>12</sup>.

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<sup>11</sup> It should be noted that many Chinese parents do not have a good understanding of the ethnic diversity in the UK. One agent mentioned a preference among their customers for "native British" staff.

<sup>12</sup> Part of this difference might be due to "reverse causation" – for example, summer schools with a large number of Chinese students might find it more feasible to customize programmes based on Chinese agents' demands. Nevertheless, agents and providers both agree that it does have a real and strong effect on Chinese student recruitment.

**Figure 5.4: Relationship of agent support with Chinese student recruitment**



Source: British Council, 2016

Another important aspect of the support provided by UK summer schools to their Chinese partners is visa application support. This sometimes also includes training the agent's staff if necessary. One agent mentioned that they had not received any such training but would greatly welcome this, either from their partners or from a body such as the British Council. Some agents are also interested in receiving more information about the UK and sample itineraries. If an agent is not accompanying the group, timely reporting and communication is greatly valued, while agents are also interested in evaluation and feedback after the trip is completed.

Finally, one agent mentioned assistance in establishing sister school partnerships as both one of their important promotional channels and an area where their UK partner provided support.

As discussed in previous sections, the majority of Chinese students and their parents do not actively search for information on summer school programmes through online or other sources and instead rely on information provided by agents. It is therefore essential to make sure that agents have all the information they need to promote the advantages of UK summer school programmes. Focus groups show that parents feel there is a particular lack of information related to safety, while it was very common for agents to say that the best way their UK partners could improve their support would be to provide more extensive promotional content, particularly videos or photos of previous classes.

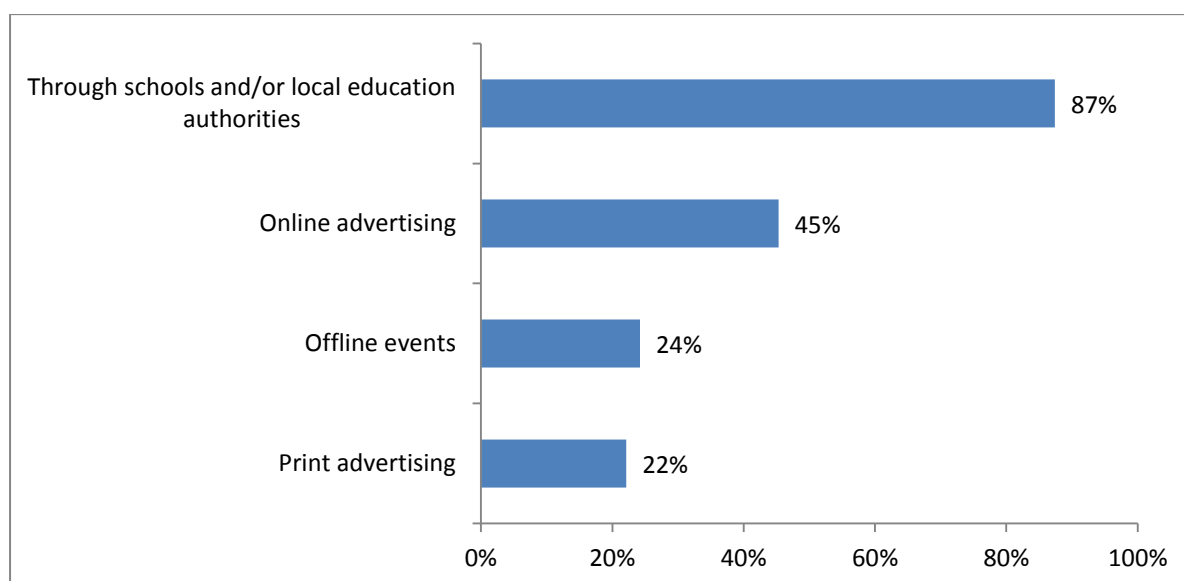
#### **5.4 Promotional channels**

In general, Chinese summer school students and their parents do not tend to be particularly informed consumers and generally rely on courses available through a single agent. This is often an organisation they trust due to cooperation with the student's school or an after-school language training course they attend. Some agents

commented that their customers are becoming more sophisticated in this regard but parents who search for a wider range of courses online are still in the minority.

Working with schools is therefore by far the most common promotional channel for Chinese agents. Seven out of every eight surveyed agents said that they worked with local schools or other education authorities while the next most common channel, online advertising, was used by less than half. Even among agents who both work with schools and have online advertising, the former channel is still typically the main source of students. Around a quarter of agents said they held or participated in offline events aimed at recruiting students.

**Figure 5.5: Promotional channels used by agents**

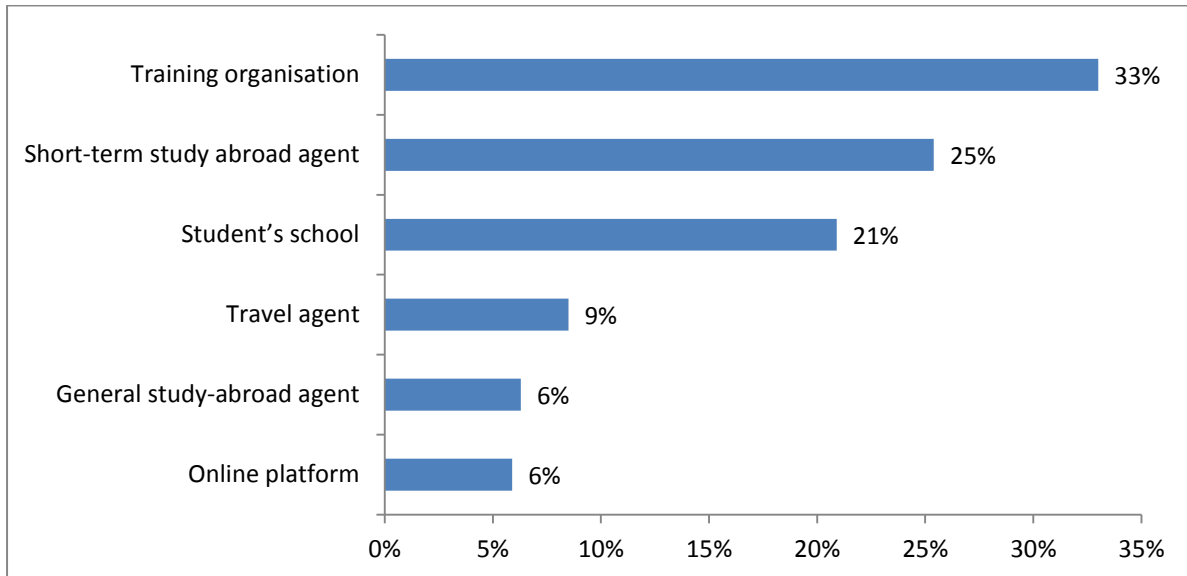


Source: British Council, 2016

Some large private language school chains also send students to overseas summer school programmes. Although their numbers are small, they account for a disproportionate share of the market – research from Ipsos and New Oriental shows that they represent a third of all short-term study abroad students. This category is dominated by private English language centres such as New Oriental itself. They have the advantage of an existing relationship with many potential students and their parents, as well as relevant promotional opportunities. These organisations generally sell programmes under their own brand rather than that of their UK partners and also tend to invest more in advertising.

The next largest group of students are sent by agents specialising in short-term study and the student's own school. Other players such as travel agents, general study-abroad agents or online platforms account for a much smaller share of the market.

**Figure 5.6: Channels used by previous short-term study abroad participants<sup>13</sup>**



Source: Ipsos / New Oriental, 2015

The boundary between the “agent” and “school” categories may be a little fuzzy here as it is very common for summer school agents to work with schools to promote their programmes.

Interviews and the agent survey show that agents promoting their programmes through schools tend to be smaller than average as well as less experienced. These agents often rely mainly on relationships rather than established business procedures.

UK interviewees report that this inexperience sometimes makes them harder to work with as they are less familiar with the market and may make unreasonable demands. Another common problem is inexperienced group leaders, which is also seen as a more common issue with smaller agents. Nevertheless, some larger agents also rely on local schools as their main recruitment channel and others arrange talks and presentations at schools to encourage students to sign up.

<sup>13</sup> “Training organisations” in this chart mainly refer to after-school language centres like New Oriental. The boundary between the “agent” and “school” categories may be a little fuzzy, as it is very common for summer school agents to work with schools to promote their programmes.



## 6. Difficulties experienced in the Chinese market

UK summer school interviewees discussed the main difficulties they experienced in the Chinese market. Some of these difficulties were specific to Chinese students, such as the strong and perhaps counterproductive focus placed by Chinese agents and parents on tourist visits. Other issues, such as trouble in finding suitable homestay partners or maintaining the right multicultural student balance, were similar to those experienced in other markets. Even in the latter case there were particular difficulties that were more common for Chinese students compared to those from other countries.

### 6.1 Excessive preference for tourist visits

All UK summer school interviewees expressed the same attitude about Chinese agents' and parents' attitude to tourism. As discussed in previous sections, Chinese customers have a much stronger focus on tourist visits than students from other countries and push for a larger number of such visits. In the words of one UK interviewee, Chinese parents think it is “a waste” to “go to the UK and not see everything”. In comparison, they have less interest in other non-academic activities.

UK summer school operators felt that this attitude is counterproductive and that programmes should focus less on tourism. Some commented that students themselves are not as positive about these extended visits as their parents or agents and would prefer other activities. Others mentioned that these visits are not the main competitive advantage of a language school and would be better served by a tour group. Another survey respondent pointed out a conflict between Chinese agents' demand for programmes with a diverse student population and their insistence on excursions that do not appeal to other nationalities.

Chinese groups also demand a high level of knowledge and explanation during these visits. Chinese parents in focus groups commented that they wanted programmes to provide more information and context about the places they visit rather than something the student might have already experienced on a family trip. One interviewed agent expressed their dissatisfaction with the quality of guides their students were provided on a recent programme, saying that they had expected a “professional tour guide” but the UK school had instead provided someone with less experience.

UK summer schools address this issue in different ways. Some, especially those with more market power, push back against this demand and hold to their previous course design. However, others can only try their best to persuade Chinese agents that the programme would be more productive and enjoyable if students felt that their time was less “squeezed”.

### 6.2 Strong preference for certain locations

Summer school operators commented that Chinese students have a strong preference for programmes in certain locations. This especially applies to London, although Oxford

and Cambridge are also popular. Although international students in general have a preference for these areas, summer school operators commented that this is a particularly strong factor for Chinese students especially combined with Chinese students' preference for tourist visits (as discussed in Sections 4.3.3 and 6.1). Some operators deal with this by having an extended tour to London after students finish their period of study.

A representative of a Scottish language school also commented that it is important to work with agents who understand their region and can explain its advantages to parents, who tend not be familiar with different parts of the UK. Similarly, an agent commented that their major problem when promoting courses in other parts of the UK such as Northern England was a lack of knowledge about these regions and said that they would welcome more support from their partners to build their knowledge.

### ***6.3 Difficulties in communication with Chinese agents***

Communicating and maintaining relationships with Chinese agents was described as difficult at times. According to multiple interviewees from UK summer schools, it is common for Chinese partners to make requests at short notice or change their mind about what they want. One interviewee commented that Chinese agents were more likely than those from other countries to have urgent questions or requests outside of normal office hours.

This may be related to Chinese agents' preference to use instant messaging software to do business. The most common such tool is WeChat, but other tools such as Skype or QQ are also used. This can be unfamiliar to some UK summer school providers, who prefer to rely on email, but UK interviewees see it as an important tool for maintaining communication and improving relationships.

Another difficulty in communication is that Chinese agents are often over-optimistic in their assessment of how many students they are likely to send and tend not to give bad news until the last minute. This was the most commonly mentioned problem in the survey of UK summer school operators.

Some UK summer school operators mentioned occasions when the actual size of a group of students was significantly smaller than agents' previous estimates, which can cause problems for schools expecting these numbers. One UK institution commented that the information agents provide on allocations is unreliable and that "the majority of allocations disappear completely in April". Another said that they lacked confidence in Chinese agents after many allocations have failed to result in actual student groups.

One interviewee described relationships with Chinese agents as being both more important and harder to build compared to those from other countries. Due to the overall lower average level of experience of many Chinese agents, it is important to make sure that they properly understand the nature and benefits of the programme.

This was described as a key issue in building student numbers, with long-term cooperation seen as leading to strong opportunities.

#### **6.4 Homestays**

Homestays were mentioned as a major difficulty by many different summer school operators and some saw it as their biggest current problem. There is a perception among Chinese agents that homestay families in the UK are less friendly and more business-oriented than their counterparts in other major destination countries. This perception is also supported by UK summer school operators. Other homestay-related problems include difficulties finding and managing suitable homestay families.

Homestay is also seen as the main area of difficulty for Chinese agents. According to one interviewee from a leading Chinese agent, this is “the thing that bothers us the most” and “the key to the whole package”. The interviewee said that homestay arrangements are by far their largest cause of complaints: “nobody complains about the schools or the classes, it’s all about homestay”. They also suggested that formal standards and accreditation for homestay providers would help to address their problems.

As with several other factors discussed in this section, these difficulties are not exclusive to Chinese students but still represent an important issue in the market. One particular issue that summer school operators described as more prominent for China than it is for most other major (especially European) countries is that Chinese students are unfamiliar with the UK’s diversity and can be surprised to be placed with a non-white family. One way to address this is to work with the agent to make sure students have a better idea of what they might experience when on the programme.

#### **6.5 Characteristic weaknesses of Chinese students**

As with all countries, students from China have their own typical strengths and weaknesses in terms of their English ability. They tend to be good at grammar but less confident in spoken English. Chinese students were described as reluctant to communicate or speak up in classes, especially if they are worried about making mistakes. One interviewee put this down to the different educational philosophies in China and the UK.

Summer school operators did not see this as a major problem as language teaching is their core competency and experienced teachers are able to encourage Chinese students to communicate. Activities which encourage Chinese students to make friends with people of other countries are also described as important.

From a less academic point of view, Chinese students were also described as less independent than children of a similar age from many other countries. This creates a greater need for services like airport pick-up and increases the time staff must spend on these students.

## **6.6 Inexperience of some group leaders**

In some cases, UK summer schools said they experienced difficulties with group leaders organising groups of Chinese students. These group leaders, often teachers, are sent by agents or schools in order to help with the group, but summer schools report that not all of them take responsibility. Interviewees complained that these teachers often “see it as an incentive trip and not work” and some of them are “more demanding than the students”.

According to interviewees, the most effective way to deal with this issue is to work with agents to make sure the group leaders understand their responsibilities. More experienced agents tend to be better at making this clear.

## **6.7 Price sensitivity**

The Chinese market was described as “very price-sensitive” and agents rated price as one of the most important factors in their customers’ choice of programme. In turn, UK programme operators mentioned that their agents put pressure on them to reduce prices without reducing quality. An institution offering higher-end courses commented that “it is difficult for people to see the quality from time to time”.

This price-sensitive segment of the market is likely to persist for a long time. Although economic growth means that some Chinese people are getting wealthier and can afford more expensive programmes, an even larger number of families are moving into this income band who previously could not afford overseas study at all.

As well as being a difficulty, price sensitivity is also an opportunity for operators who can provide summer school programmes at an affordable price. At the same time, there is also demand for high-end programmes from less price-sensitive customers which provides opportunities for differentiation based on factors other than price.

## **6.8 Demanding customers**

At the same time as being price sensitive, UK summer school providers also described Chinese parents as “very demanding” with high expectations of course quality, visits, accommodation and other aspects of the course. Some agents also have unrealistic expectations of what can be provided. Interviewees generally put this down to China being an immature market and parents (and in some cases agents) being unfamiliar with overseas summer school programmes.

The best solution here is to provide more information to all parties – including the agents, group leaders, parents and students – to let them know what to expect. At the same time, summer school providers should listen to their Chinese customers’ demands and try to work with agents to design programmes that better meet these needs.

## **6.9 Food preferences**

Food was described by many students and parents as one of the UK's key weaknesses, while several agents also suggested that improving food would be an important step to improve their UK partners' programmes. This is not just a perception based on stereotypes; several students that had previously attended UK summer school programmes also had negative opinions about the food (although others commented that "it wasn't as bad as I expected"). Previous research by the British Council shows that this is a genuine concern for Chinese students across all levels of education.

Chinese food is not necessarily required, as experiencing overseas culture is the top reason for many students to go on summer school programmes. However, Chinese people tend to have more negative views of cold food than people from the UK and dislike eating sandwiches every day.

UK summer school providers can address this by recognising the importance of the issue to Chinese students and their parents. One interviewee had switched to providing hot lunches two days a week in response to feedback from their Chinese agents as well as changing to a softer, sweeter type of bread that is more familiar to Chinese students.

## **6.10 Importance of student diversity**

Another important challenge experienced by some UK summer school operators is the preference for student diversity. Although students from almost all countries prefer to be in classes with a range of different nationalities, this is particularly relevant to the Chinese market for several reasons. Aside from China's size and its position as a major growth market, Chinese students tend to come to the UK in a relatively narrow window in July and August and the younger average age of Chinese students means that they make up a larger share of students in certain age groups than in the market as a whole.

This preference imposes a limit on the number of Chinese students who can be recruited without also increasing recruitment from other countries. Some UK summer schools say that they have "reached [their] percentage of Chinese students" and no longer see China as a major growth priority.

Aside from recruiting a larger number of students from other countries, there is relatively little that UK summer school providers can do to address this. In comparison to summer school programmes, the issue is even more critical during the Chinese New Year period when few non-Chinese students travel. One interviewee's school offered heavy discounts to students from other key markets such as Italy during this period in order to increase the number of non-Chinese students.

It is important to note that although ensuring a diverse student population can be a challenge, the UK is in a much better position than other English-speaking countries due to its proximity to mainland Europe. An agent described Australia as particularly dominated by Chinese students, while Chinese people can also make up a majority of students on programmes in the western US or Canada.

## 7. Future Trends

### 7.1 Overall market growth

Interviews and survey findings show that the Chinese market for overseas summer school programmes is growing rapidly. Agent numbers and the number of students served by existing agents are both increasing rapidly.

Despite China's falling youth population, there appear to be few signs that this growth will slow down over the next few years. Instead, agents point towards increasing interest in short-term overseas study, which they link to both increasing affluence and the greater international consciousness of the new generation of parents.

### 7.2 Diversification of destinations, but continued UK strength

Several interviewees pointed towards growing interest in less traditional overseas study destinations such as those in South East Asia. Data from agent surveys showed that the growth in students to the UK, while still significant, was slightly slower than that seen in the overall market in 2016. This trend is likely to continue over the next few years.

Nevertheless, the UK is still seen as a very attractive destination and agents believe that it will continue to hold its position as the second-most attractive summer school programme destination after the US. Students and their parents are still highly attracted to the UK's education quality, culture and history, as well as being interested in future university study in the UK.

### 7.3 Particularly strong growth in younger students

A number of interviewees mentioned that they were seeing the strongest growth in students towards the bottom end of their age range. Although secondary students still make up the bulk of demand, primary-age students are the fastest-growing market segment. There is room for this faster growth to continue, at least in the short to medium term.

Agents see the UK as being at a relative disadvantage here due to a limited number and variety of programmes aimed at younger students.

### 7.4 Increasing demand for unique programme types, but "language plus" will remain dominant

On one hand, the traditional "language plus" programme format is still the main choice for Chinese summer school students. Parents value the combination of language learning, activities and tourist visits, and this is seen as the default option for an overseas summer school programme.

At the same time, agents and summer school providers reported increasing demand for specialised programmes, which they expect to continue to grow over time. Many are seeing strong growth in programmes with a particular theme, while unique course content and activities in fields such as drama is a key selling point. Despite relatively low awareness of specialised programmes, parents appear to show a strong interest in this type of programme.

Specialised or themed programmes appear to be particularly popular among students who have attended an overseas summer school programme in the past. The decreasing age of students going abroad means that these returning students will make up a larger share of the total, which is likely to increase demand for more specialised programmes. Similarly, there is more demand for specialised programmes among slightly older students, particularly in the high school age group.

### ***7.5 More demanding and sophisticated parents***

Many interviewees report that the parents are increasingly well informed, although focus group research shows that the proportion that research summer school programmes online is still low. Agents say that parents now care more about programme quality compared to previous years. Key areas where agents see parents as becoming more demanding include teaching quality, quality of visits (particularly in terms of the quality of explanation provided, with professional tour guides preferred), and accommodation.

In parallel with this, parents are increasingly likely to look for information related to safety and other aspects of the course and it is therefore becoming more important for UK summer school operators to provide this information to their Chinese agents. Agents believe that both the focus on quality and the demand for information will continue to become more important in future years.

### ***7.6 Continued dominance of major cities***

Despite the faster economic growth of smaller cities, China's Tier 1 cities and a few other major markets remain the main source of overseas summer school students. Two thirds of agents are based in just 10 cities. Furthermore, agents in the top markets tend to be larger, while national-level agents do much more business in these large cities.

Demand for summer school programmes seems to be broadening somewhat but the difference in the rates of growth between larger and smaller cities is not especially dramatic. Interviewees expect the future trend to be similar – to some extent there will be an increase in the proportion of students coming from smaller cities, but the current top cities will continue to be the main source.



## 8. Opportunities, Challenges and Unmet Demands

Mainland China is an important source of outbound students for summer school programmes, and has seen strong growth over the last few years. This looks likely to continue over the next few years and the UK is seen as one of the most attractive destinations. This means that there are increasing opportunities for UK summer school providers to attract more Chinese students.

Despite slightly faster growth in smaller cities, the bulk of demand still mainly comes from China's largest cities, including the four so-called Tier 1 markets (Beijing, Shanghai, Guangzhou and Shenzhen) as well as a few other large or wealthy cities including Hangzhou, Chengdu, Tianjin and the cities of the Pearl River Delta. Most agents focus on a particular geographical region, making it important for UK summer school providers to have multiple partners across the country.

In general, Chinese parents and students' main aim for an overseas summer school programme is to experience life and culture overseas while language learning is a secondary goal. Homestay is therefore an especially popular option among Chinese students. Visits and tours make up a more important part of the programme than they do for students from most other countries and there is a demand for deeper expertise and cultural context relating to these visits.

Many UK summer school providers see this focus on visits as a negative factor, in which case it can be important to communicate with Chinese agents to convince them to reduce the number or intensity of planned tours. Other areas that need to be addressed by communication with Chinese agents include unrealistic agent or parent demands; inexperienced or excessively demanding group leaders; and (for providers that are not based in popular regions such as London) the characteristics and advantages of different parts of the UK.

Traditional "language plus" programmes tend to be the most popular type of programme for Chinese summer school students. However, more specialised programmes are growing in popularity and some interviewees comment that themed programmes – for example, a course based around drama – are becoming particularly popular. In comparison to students from other countries, Chinese students also tend to be more interested in pre-university taster programmes. Immersion courses that involve local students would be particularly warmly welcomed by Chinese parents and agents, although these would be harder to provide.

The main unmet demand mentioned by both parents and agents was for a wider variety of programmes aimed at younger students. Chinese summer school students tend to be younger than those from many other countries, with many students going overseas during their junior high school years (age 12-15) and the fastest growth is among primary-age students.

Parents and agents discussed a relative lack of course options for these younger students in the UK, with several agents saying that expanding the age range would be their top suggestion for UK summer school operators. From a different angle, one UK



summer school provider offering programmes for the younger age group said that they saw a relative lack of competition in this segment.

Other unmet demands from parents and agents include providing more information on programmes, particularly regarding safety; providing better-quality food (Chinese students tend to dislike eating cold food on a regular basis); and offering programmes involving local (i.e. UK) students. Information on safety is likely to be particularly important given recent terrorist incidents in the UK, which could affect the UK's reputation as a safe study destination and could particularly affect school groups. However, the long-term impact of these events will likely be limited.

Chinese summer school students and their parents do not tend to be particularly informed consumers. They generally rely on courses available through a single agent – often an organisation they trust due to cooperation with the student's school or an after-school language training course they attend. Some agents commented that their customers are becoming more sophisticated in this regard, but the proportion who search for a wider range of courses online is still relatively low. A course's availability through trusted agents is therefore a very important factor determining its popularity.

Working closely with agents is therefore very important in the Chinese market, although Chinese agents can often be demanding and may promise more than they are able to deliver. Nevertheless, they can provide valuable advice and support as well as helping to suggest improvements that could help make programmes more appealing to Chinese students. Some UK summer school providers reported that the closeness of the agent relationship as a major factor influencing the number of students they receive. Agents particularly value closer cooperation on course design, while in-person promotional support is viewed as very useful but is typically not a requirement.

Overall, there is significant room for growth in the China's overseas summer school market over the next few years. Specific areas which will see stronger growth include programmes with a particular theme or those aimed at younger students, while close cooperation with agents will play an important role in course promotion and have a strong effect on student recruitment.

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