

ON THE DEVELOPMENT OF THE ENGLISH LANGUAGE EDUCATION AND TRAINING MARKET IN CHINA

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ABSTRACT

With the rapid economic development in China, an English boom has come. English language education and training has been industrialized, and the huge market has become an important sector in China's economy. This paper presents an analysis of the factors leading to the formation of the market, as well as its scale, profits and development trends. It is hoped that this study can contribute to a better understanding of English education in China.

Key Words: English; education; training; market; trend

INTRODUCTION

English language education in China has been gaining increasing importance, and English language training has developed into a huge and prosperous market. This might be a phenomenon unique to China. When an aspect of education becomes an industry, it has the properties that are characteristic of a market, with operations based on market mechanisms, and thus can be discussed within the framework of marketing theories. This article is an attempt to investigate what factors contribute to the emergence of the market, who and what are involved in the market, how the market is running and in what ways it will continue into the future. It is hoped that the article can shed light on these questions, and help readers to gain a deeper understanding of English language education in China.

EMERGENCE OF THE MARKET

There are many factors contributing to the birth and growth of the market. Firstly, English has established itself as the modern era's lingua franca (Crystal 1997). According to a recent report (Qi 2009), English is the official language or second language of 75 countries, covering a population of about 900 million. This means that nearly one out of five people in the world understands English, at least to some degree. These countries possess about 70% of

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the world's wealth, which suggests that one is likely to be free from wealth if he or she is English illiterate. It is estimated that 75% of global TV programs are broadcast in English, 80% of scientific and technological information is conveyed in English, nearly 100% of software source code is written in English, 36% of internet users communicate in English, and English is the sole language for international flights (Wang 2009).

Secondly, thanks to its rapid economic development, China has merged into the international family. Chinese people are increasingly aware of the importance of understanding English, so as to be able to learn from, and thus communicate with the other family members. For example, in preparing for the Beijing Olympic Games, about 600 thousand Beijing residents were studying English before the event. The desire to raise English proficiency levels has prompted many people to learn English at great cost of time, effort, and money. English language education has permeated into every corner of Chinese society.

Thirdly, the increased income among Chinese families has made studying abroad an extremely popular choice for young people. The past 30 years has witnessed the waves of the English boom in China. In recent years in particular, some families are wealthy enough to allow the younger generation to pursue higher education abroad. The strong support for studying abroad stems from the desire of young people to see the outside world, broaden their perspective, and obtain a foreign degree, which is generally viewed as being superior to a degree earned domestically; therefore, parents usually are very generous with their investment. The target countries are mainly English speaking ones, including The United States, England, Canada, Australia, and New Zealand.

Last, but not least, ability-based competition has awakened many young people to the important role that English plays in seeking a job. English is regarded as a means to improve one's personal marketability, a vital tool with which to shape or change his or her future. Chinese society has demonstrated some favour for those who are English capable, and those who want to be a winner must display their advantage over others in terms of English proficiency. For example, to enter a university or a college for higher education, an English examination is required; to get a good job upon graduation, an English level certificate; for further study at the MA level, a nation-wide English examination needs to be taken; a promotion in a professional post is also accompanied by an English Examination for Professional Promotion (as it is called in China); the first step in a government scholarship application for studying or doing research abroad is to pass the PETS-5 (Public English Testing System – Level 5). All these seem to suggest that in China, English is involved in every step of one's educational life. It is apparent that one's personal development will be hindered if he or she lags behind in English. As a result, it is not difficult to understand why there is a great demand for learning English, which has led to the formation of the English language education and training market.

SUBJECT OF THE MARKET

Robert Di Yanni, Board Director of American University College, said that the Chinese passion for English is amazing, and China has become the largest, the most important, and the most promising English language education market in the world (2010). In that case, how large is the market?

In elementary school, children start learning English at a younger and younger age. Most primary schools offer English courses at grade three, some even at grade one. Parents who long to see their children succeed in life attach great importance to their child's English learning, encouraging them to learn English by sending them to extracurricular English classes. In tertiary education institutions, English is a compulsory course. An English proficiency test, called College English Test (CET), is administered to college students twice every year. It is a standardized test, administered on behalf of the Ministry of Education. As a criterion-related norm-referenced test (Yang 1998), the purpose of the CET is to make assessment of the English proficiency of the students. A college student is supposed to pass the fourth level of the test, namely CET Band 4 (CET-4). Those who can score more than 85 points are qualified to take CET-6. Since CET is a nationwide English examination, the proficiency level of students from different universities and colleges can be measured and compared on the same scale. Accordingly, it is widely recognized in society, and has a strong social impact. It has become a "must-pass" test among college students, for a CET certificate is convincing evidence of how good a student is. Every year there are about 6 million students sitting for the CET-4. However, due to its difficulty level, only about 60% of the students pass the test with on their first attempt. The rest of the students, who are eager to have a CET certificate, will have to take the test twice or more. According to a survey (Tao 2009), each student spends, on average, 25 US dollars in preparing for the test. Therefore, CET training and tutoring books have become a large and stable market, occupied mainly by English training agencies.

In recent years, because of the fast expansion of enrolments, finding employment has become increasingly difficult for students post-graduation. Many college students have realised that a bachelor's degree is far from competitive, and further study at the MA level may provide an advantage when hunting for a job after graduation. As a result, more and more sophomores and seniors decide to prepare for postgraduate study, and becoming a postgraduate student becomes their new investment. In addition, large numbers of BA graduates who are not satisfied with their current level of employability also join the workforce. English is a mandatory course in the postgraduate enrolment examinations. Consequently, a vast market has emerged, where coaching the test-takers and selling them tutorial materials has become a large source of earning profits. It is estimated that the investment made by a student in improving their English can reach 120 US dollars (Liao 2007). This has been noticed by sharp-eyed businessmen as a potential income source. Therefore, English training schools have sprung up in different forms and sizes, catering to all needs, and becoming a new area for business investment and development.

For students planning to study abroad, English training makes up the largest market proportion in terms of profit. In order to get an offer from a foreign university, applicants have to take one or two international English tests, such as TOFEL (Test of English as a Foreign Language), IELTS (International English Language Testing System), and GRE (Graduate Record Examination). This is the first threshold that they must step over. Apart from this purpose, the test report is also a significant qualification in applying for a high-paying job or a desirable position. Take, for example, New Oriental, the largest agency specialising in English training. Every day there are tens of thousands of English learners attending its English classes, bringing in a yearly income of 150 million US dollars. In some training schools, each training session opens to its full capacity, with lots of learners placed on a waiting list. The fees for different training classes vary, but intensive English training classes for TOFEL and IELTS charge very high fees, usually one session (lasting one month) costs 2,500 US dollars. According to a survey (Liu 2008), each year about 200 thousand people in Beijing attend English training schools, creating a market of 300 million US dollars.

Attracted by the large market demand and enormous profits, other related industries have tried to grab a share, igniting a fierce battle in the English publishing market. To be more competitive, some publish entire series, from primary school to university level. Many co-publish English books with foreign publishers, or they collaborate with testing agencies in putting out specialized coaching books. In selling the books, they have tried every possible commercial means to take a greater market share. Every year, there are thousands of new CET-, and TOFEL-related books appearing in the book market. Some training schools compile coaching materials on their own, and sell them to their students, another source of gaining profit. These textbooks and tutorial materials have become an important pillar of the publishing industry. A survey conducted in 2006 by Foreign Language Teaching and Research Press reported that 25% of the publications nationwide are English related, and some publishers even live on English publications (Liu 2008). All publishers are aware that English publication offers a big profit with small capital outlay.

English related technological products have also swarmed into the market. For example, repeaters for learning English increased their market shares from zero to 250 million US dollars within just 3 years. Its fast growth was propelled by “English fever” among Chinese young people. 80 million middle school students, 10 million college students and countless other English learners provide companies with a huge market; one-fifth of them already own a repeater.

Computer software for learning English has also poured into the market. The software, characterized by information, interactivity, and practicality, serves different purposes. Various English websites attract a large English learning population. Learners are excited about being able to study English without teachers, and they are giving their money to these shrewd designers.

Intermediate agencies, which specialise in assisting students to study abroad, are another significant sector of the English industry. They provide consultation and act as agents for foreign universities, from which they charge fees and commissions. In 2002, these agencies were listed as one of the top 10 Windfall Profit Sectors in China (Jin 2010).

DEVELOPMENT TRENDS OF THE MARKET

Like any booming industry, English language education and training seeks sustainable development. As the market becomes bigger and more competitive, we have found that it has displayed some new momentum.

Firstly, English language education and training agencies are attempting to build their own brands. Branding is the basis for survival. There are more than 30 thousand English language education and training agencies in China, but only those which lay emphasis on training quality, good service, honesty, and reputation, can maintain sustainable development (Qi 2009). Those which fail to realise the significance of branding will be sifted out. The small workshop agencies survive for some time, until they are driven away by large, popular brands. Competitive institutions have begun to adopt some branding strategies. For example, they optimise teaching staff by recruiting excellent teachers (including foreign teachers), improving the teaching environment and facilities, introducing advanced educational philosophies, and by constructing scientific management systems to ensure quality. Some institutions in Beijing and Qingdao have introduced the ISO9000 quality certification, by which they have established training standards, have specified proper training behaviours, and have supervised decision making. All these measures are helpful to building an English language education and training brand.

Secondly, some agencies have begun to offer individualised and distinctive training programs. Under the increasing pressure of market competition, the most innovative companies are rewarded with new opportunities. Therefore, personalised training has come to the forefront of English training. Some institutions specialising in the English training required for different trades and professions have emerged. This is mainly achieved by designing courses to cater to special needs. Consequently, the market will become adaptively subdivided. This subdivision will break the traditional patterns of homogenous competition, and differential competitive situations will begin to take shape in which English training will be of high practical value and relevance, satisfying the individual needs of different learners.

In addition, innovative training has been introduced. Traditionally, English training takes place in classrooms. However, the institutions now have developed online training, audio-visual training, and on-site training (in the customer's home or other preferred location). Fresh teaching approaches such as field practice, delivering speeches, playing games, and case analysis have been applied individually or in combination. Added to this, various information technologies have been adopted in teaching practice.

Furthermore, international English training institutions are entering China, trying to seize “a piece” of the huge market “pie”. According to the WTO Agreement, China’s education market was fully liberalised in 2005. Overseas training institutions, such as Sweden EF Group, United States Apollo Group, WSI (Wall Street Institute), Singapore Informatics Education Group, and India Aptech Group, have opened up branches in China, and some even have shifted their investment focus to China. WSI has set up about 20 branch schools in Beijing, Shanghai and Guangzhou, with a yearly enrolment of 15,000 students, and a yearly profit of 21 million US dollars (Yin 2009). English First, another rising star in the English training market, has set up 70 agencies in 28 of the 31 provinces. This has resulted in the training market becoming internationalised at a very fast rate. In Shanghai, foreign institutions make up less than 10% of the 1,400 non-degree educational institutions, but their market share is quite high, at almost 50%. With their long-established brand resource and advanced training experience, they exert strong influence on the market development. They take away enormous profit, and have brought about deeper changes in the domestic training market. For instance, they have introduced different training philosophies, international training programs, and super-class training environments. In recent years, the international English language education and training institutions have accelerated their entry into the Chinese education market, and are increasingly involved in more areas, such as degree related education, early childhood education, and exam-oriented training.

Finally, diversified training models have appeared in the market. For example, in addition to course-based training, some powerful institutions have extended their business by providing education consultation, organizing summer camps, hosting various English contests, etc. Lianda English Training Center is an example in point, which includes English performance in its training programs. Membership has been adopted as a means to recruit students. This first appeared in Shanghai several years ago, when the institutions began selling membership cards to companies which have yearly staff training programs. The main reason for introducing membership cards is to help companies achieve scale operations and to reduce the annual cost of internal training, with the added benefit of growing their customer base.

CONCLUSION

With China’s economy and internationalisation advancing, there is an ever increasing demand for learning English, and the tremendous market demand has led to the emergence of an English language education industry. This paper depicts a general picture of the English language education and training market in China and its development trends. It claims that the industry operates on a market mechanism, where the supply, demand, competition, and price, etc, interact in influencing its development.

There is no doubt that the market will become larger and larger, and attract new investors. However, before making any investment, they must be aware that branding competition will be the theme of the market development, where teaching approaches, availability of foreign

teachers, research into and development of training programs, and market promotion strategy will make a big difference. In other words, there is a risk in the investment.

Another important point is that improper or even illegal competition might arise in the market. To ensure a sound development, the government should enact laws regarding English training agencies to make legal supervision of them, and the training agencies should set up an association to make self-discipline supervision. The effective ways may include lifting market access threshold, establishing evaluation indicators, and introducing credentials system. Only when the market is normalised, free of unfettered competition, can the training quality be guaranteed.

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