

English Language Market Report: Thailand

A report prepared for the UK's English language sector

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1 Executive Summary

1.1 Background to the report

This report is to be used as a sales and marketing manual for recruiting Thai students to UK English language teaching (ELT) institutions. It has been written in three distinct parts: the context of Thailand, the opinions of stakeholders and the implications for sales and marketing. The first section gives the economic, demographic, educational and political background to recruiting students from Thailand. The second section details the result of surveys and interviews with major stakeholders: agents, university staff and students from Bangkok and Chiang Mai. The final section of the report considers what the context and stakeholders' opinions mean for the sales and marketing activities of an ELT institution in the UK, and offers a practical toolkit for marketers planning recruitment in Thailand.

1.2 Key findings

Part One: Context

- Thailand is characterised as an upper-middle-class economy by the World Bank.
- Thailand has the third most unequal wealth distribution in the world, with one per cent of the population holding 58 per cent of the country's wealth.
- Economic growth has been slow: just three per cent between 2010 and 2015.
- Political instability is one reason for economic uncertainty. Since 1932, Thailand has had 18 constitutions, 18 coups and 35 prime ministers.
- Thailand is the second richest country in the ASEAN Economic Community.
- The ageing, declining population in Thailand has been highlighted as 'significantly harmful' to the economy.
- In October 2016, the beloved Thai king, King Bhumibol Adulyadej, the world's longest-reigning monarch, died, leaving the country in official mourning for one year.
- The Thai education system has been criticised, following the publication of its poor results in the PISA (Program for International Student Assessment). Thailand placed just fifty-fourth out of 72 countries.
- Around 27,000 Thais study abroad each year.
- Thailand has two academic years: schools operate from mid-May to February, and universities from mid-August to May.
- Thailand is the seventeenth-placed nationality for English UK member institutions.
- Its government initiative Thailand 4.0 aims to improve high-tech industries and innovation.

Part Two: Opportunities and barriers to student recruitment

According to 29 agents surveyed and interviewed, 30 students surveyed and staff from four Thai universities interviewed:

- General English is the course that all agents are asked for by their students, but many are now asking for 'something different'. Courses that cannot be found in Thailand, especially for juniors, are becoming more popular.
- Australia is very attractive for language students as they can work while they study, and it is perceived as being cheaper than the UK.
- The UK is popular due to students knowing others who studied in the country, the 'love of all things UK' and the appreciation of the 'original accent'.

- Price and safety are the top two considerations for Thai students.
- Google, YouTube and Pantip are where most Thai students search for information about an institution.
- 92 per cent of agents want a discounted price to offer their students, but many warn over-discounting can devalue the brand of a quality institution.
- 88 per cent of agents require institutions to produce a physical brochure of their offer.
- Agents expect around 25 per cent commission on tuition fees, a little higher than the global average of 23.6 per cent.¹
- Faculties at Thai universities are interested in talking to UK institutions about study groups, guest lectures and partnerships. Details of faculty staff can be found by searching online.
- The chat app 'Line' is very commonly used by students, parents and agents to communicate. Marketers from UK institutions should use it to communicate with their Thai agents.
- 'Proximity to place of study' is the most important factor for Thai students when choosing accommodation.
- The visa process is the most common barrier to studying in the UK. The process was described as 'very poor', 'very long' and 'very expensive'. Institutions should report specific cases to English UK.
- Agents and students are not concerned by Brexit or UK politics, but the increased incidences of terrorism were the reason for some cancellations in summer 2017.
- Agents appreciate yearly visits and regular communication with the institutions that they work with. Familiarisation trips are also valued highly.
- Institutions should ensure their marketing materials and campaigns are relevant for the three main stakeholders: students, agents and parents.
- Thai universities, schools and agents may be open to joint product development for new courses, incorporating either study-abroad opportunities in the UK or delivery in Thailand.
- Thailand-based B2B and B2C events are considered important by most agents, but events run by other service providers, such as publishing or tourism, could also be looked at for partnerships and opportunities.
- Government plans to internationalise universities could create opportunities for teacher training.

Part Three: Marketing and recruitment for ELT institutions

- Students are the ones who often research an institution or destination and then present this information to their parents. This could be considered when designing an institution's brochure, creating video content and asking Thai students to write recommendations on Thai youth community websites.
- Agents are highly trusted by students and parents and often take the role of mediator if they disagree with each other. Ensuring that an agent understands an institution, tightening up communication and answering questions from agents quickly could aid them in persuading a parent to choose a particular institution.
- Agents recognise the difference between a chain school with a local representative and an independent institution where they have known the representative for many years. Both are valued, but agents expect an institution's marketing activities to reinforce these strengths and for marketers to be clear on their USPs.

¹ Study Travel Magazine: <http://www.studytravel.network/magazine/issues/may2017/SpecialReport-may17>

2 Introduction

2.1 Sources and methodology

Secondary research was taken primarily from:

- British Council Country Brief: Services for International Education Marketing
- English-language Thai newspapers: The Nation and Bangkok Post
- English UK Statistics
- ICEF Monitor
- PwC
- Study Travel Magazine
- The PIE News
- UK Council for International Student Affairs (UKCISA) statistics
- United Nations data
- The World Bank

These sources offered historical and economic background to the report, and much of their findings were reinforced by the interviews and questionnaire responses of stakeholders.

Primary research was conducted with agents and students, and staff from four universities in Thailand. Interviews of agents were conducted in-country, and the depth of responses was possible due to the ten-year relationship that the author has with many of them.

3 Part One: Context

3.1 Thailand: an introduction

Thailand, or *Prathet Thai*, means ‘Land of the Free’, and it is the only country in Southeast Asia not to have been colonised by a European country. At around 513,000 km², the country is twice the size of the UK and is home to approximately 64 million people, with 9.3 million people living in the nation’s capital, Bangkok.²

The economy and prospects

Thailand belongs to the Association of Southeast Asian Nations (ASEAN) and is the second richest of the ASEAN economies, with a GDP of \$406,840 billion in 2016.³ Thailand’s GDP per capita, however, shows that this does not tell the whole story.

Table 1: GDP per capita, ASEAN economies

ASEAN	GDP (billion USD)	GDP per capita
Indonesia	\$932,259	\$3,570
Thailand	\$406,840	\$5,907
Philippines	\$304,905	\$2,951
Singapore	\$296,966	\$52,960
Malaysia	\$296,359	\$9,502
Vietnam	\$202,616	\$2,186
Myanmar	\$67,430	\$1,275
Cambodia	\$20,017	\$1,270
Laos	\$15,903	\$2,353
Brunei	\$11,400	\$26,938

Source: The World Bank data 2016

The World Bank upgraded Thailand’s income categorisation last year from a lower-middle- to an upper-middle-income economy, yet Thailand has the third most unequal economy in the world, with one per cent of the population holding 58 per cent of the country’s wealth.⁴

Further concerns have been highlighted in a recent report by The World Bank. The report, *Thailand – Systematic Country Diagnostic: Getting Back on Track – Reviving Growth and Securing Prosperity for All*,⁵ looks at challenges and opportunities for the country.

Challenges included:

- Political instability: since 1923 there have been 18 constitutions, 18 coups and 35 prime ministers.
- Reduced productivity: between 2010 and 2015, the industrial sector grew by just one per cent.

- Economic slowdown: growth from 1986 to 1996 was 9 per cent, in contrast with 2010 to 2015, when the economy grew by just three per cent.

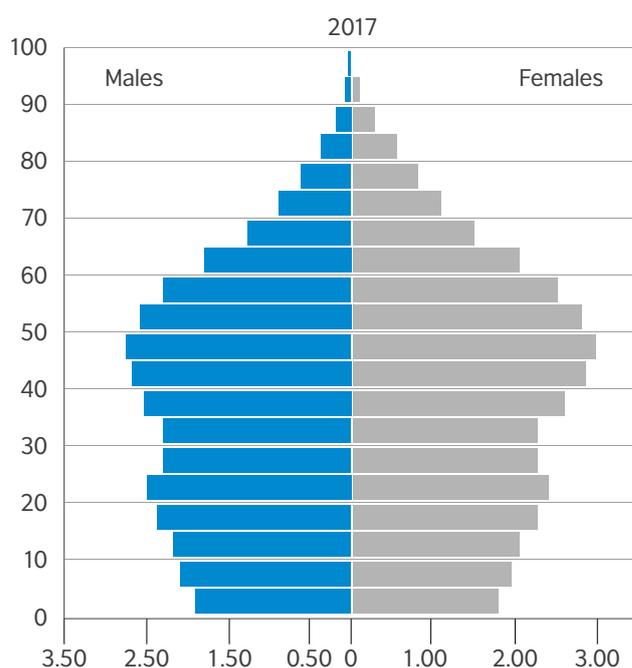
Opportunities highlighted:

- Creating more and better jobs.
- Providing more support to the bottom 40 per cent of the population.
- Making growth greener and more resilient.
- Strengthening the institutional capability of public sectors.

Demographic context

Thailand has an ageing population, and this is seen by many Thai economists as a grave concern for the country’s future economic prosperity. In a recent press release, Sira Intarakumthornchai, CEO for PwC Thailand, was quoted as saying, ‘The impact of a declining, ageing population could significantly harm Thailand’s ability to increase its share of world GDP in a similar way to other countries, such as South Korea, Russia and even Japan.’⁶

Figure 1: Age and gender structure of the Thai population in 2017⁷



² <http://www.un.or.th/services/population/>

³ <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD> and <https://data.worldbank.org/indicator/ny.gdp.pcap.cd>

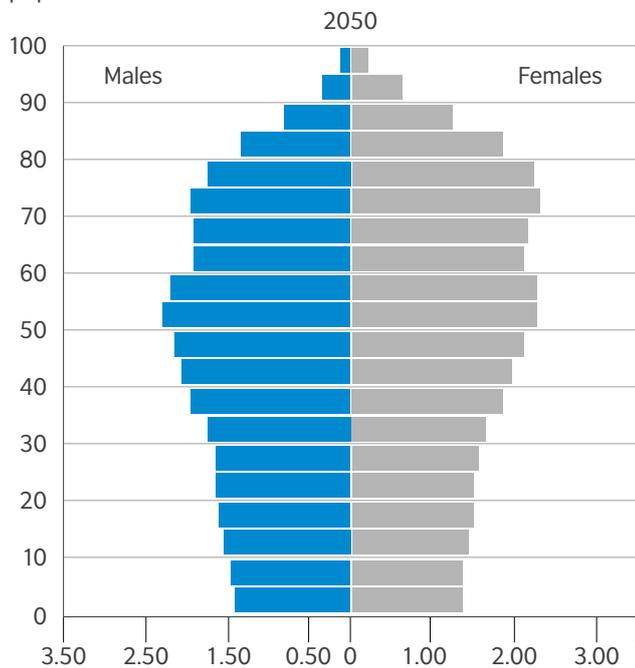
⁴ <http://www.bangkokpost.com/learning/advanced/1147468/thailand-third-most-unequal-country-in-world>

⁵ <http://www.worldbank.org/en/country/thailand/publication/thailand-systematic-country-diagnostic-getting-back-on-track-and-reviving-growth>

⁶ <https://www.pwc.com/th/en/press-room/press-release/2017/press-release-28-02-17-en.html>

⁷ <https://esa.un.org/unpd/wpp/Graphs/DemographicProfiles/>

Figure 2: Predicted age and gender structure of the Thai population in 2050⁸

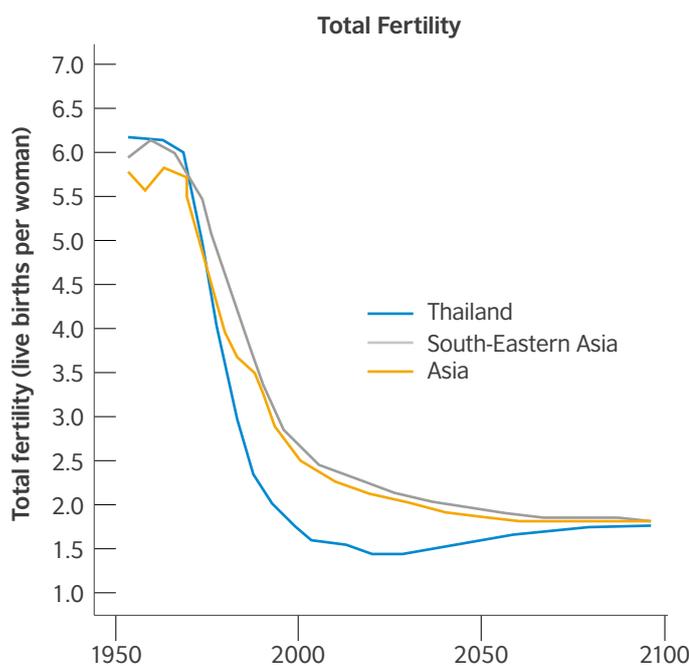


Between 1950 and 2000, the birth rate in Thailand dropped from more than six children per woman to fewer than two children, while life expectancy increased from 56 years old to 70 years old in the same period.

A low birth rate and high life expectancy will mean fewer working-age people to support this ageing population, which could result in country-wide economic difficulty.

The median age in Thailand in 2015 was 37.8 years, and the estimated median age for 2020 is 49.2⁹. This is due to the fertility rate dropping dramatically in the latter half of the twentieth century (see Figure 3).

Figure 3: Live births per woman, 1950–2100¹⁰



⁸ <https://esa.un.org/unpd/wpp/Graphs/DemographicProfiles/>

⁹ <https://www.statista.com/statistics/331867/average-age-of-the-population-in-thailand/>

¹⁰ <http://www.bbc.co.uk/news/world-asia-15581957>

3.2 Politics and the monarchy

Thailand had been ruled by a military led government since 2014, when a short coup ousted the democratically elected government. Thailand has, however, been ruled by a military-appointed government for the majority of years since the introduction of the constitutional monarchy in 1932.¹¹ In the past decade, Thai politics has been tainted with accusations of corruption and nepotism, as well as protests and fighting among those for and against the controversial former prime minister Thaksin Shinawatra.

The current military led government held a referendum on a new constitution which was approved in August 2016. A general election is planned for 2018 as the country transitions from military to civilian rule.¹²

The monarchy

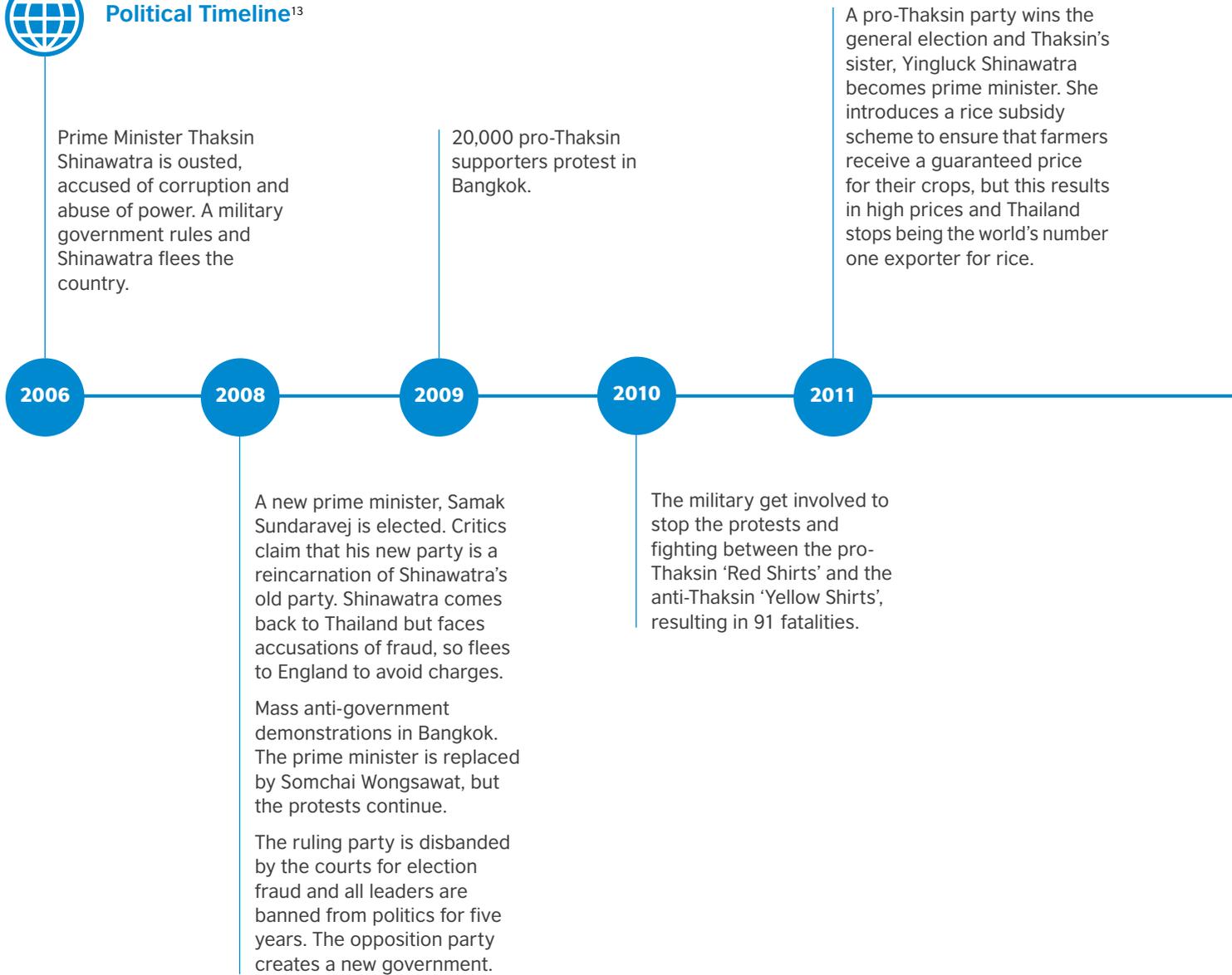
While the political climate of Thailand could be classed as turbulent, the monarchy serves as a stable, revered institution which unites Thais of all backgrounds. Their beloved king, King Bhumibol Adulyadej, the world's longest-reigning monarch, passed away on 13 October 2016, aged 88. His death triggered a one-year mourning period, in which civil servants and officials were expected to wear sombre colours, and events and celebrations were postponed. There are strict *lèse-majesté* laws in Thailand that punish any defamation, insult or threat of members of the royal family with a minimum of 15 years' imprisonment. Regardless of these laws there is genuine affection and respect for the late king. The majority of people in Bangkok wore black and white during the mourning period, and many agents interviewed for this report spoke openly about how they feel about the king and what he did for the country, especially in the rural communities. King Bhumibol's son, King Vajiralongkorn, will be crowned after the cremation of his father.

¹¹ <http://www.bbc.co.uk/news/world-asia-15581957>

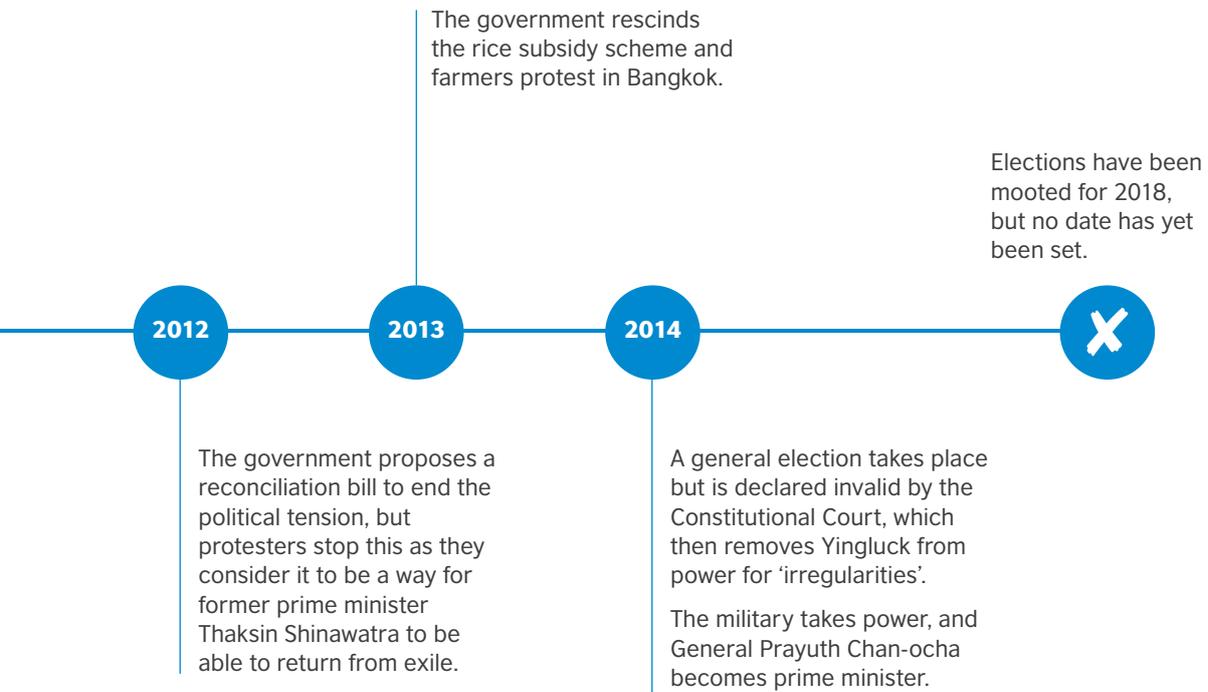
¹² <https://ei.britishcouncil.org/educationintelligence/country-brief-thailand-2017>



Political Timeline¹³



¹³ <http://www.bbc.co.uk/news/world-asia-15581957>



3.3 Thai education

Table 2: Thai education system

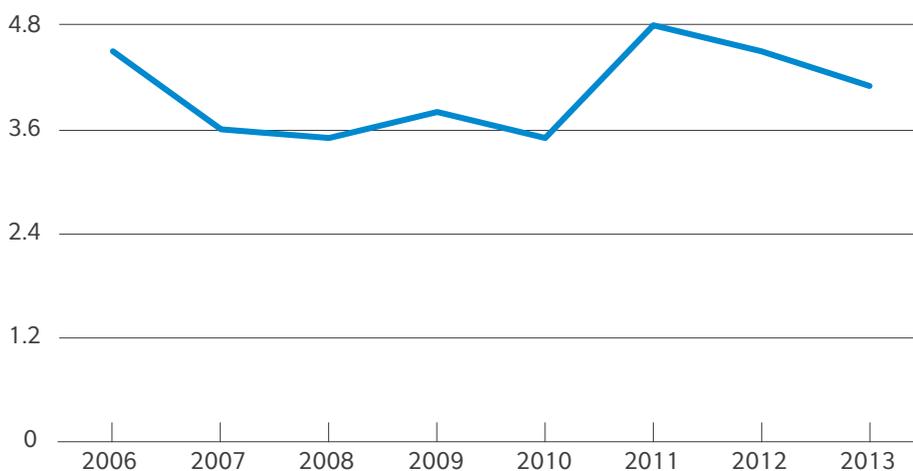
Education	School/level	Age	Years
Primary	Prathom 1–3: Elementary School	6-8	3
Primary	Prathom 4–6: Elementary School	9-12	3
Lower	Matthayom 1–3: Secondary School	13-15	3
Upper Secondary	Matthayom 4–6	16-18	3
Vocational	Vocational Training	15+	3
Tertiary	Bachelor’s degree	18+	4
Tertiary	Bachelor’s (pharmacy & architecture)		5
Tertiary	Bachelor’s: doctor of dental surgery, medicine and veterinary medicine		6
Tertiary	Master’s degree		2
Tertiary	Doctorate degree		

Source: Classbase.com ¹⁴

Education is compulsory and free to all children from six to 15 years old, and literacy rates for children from 15 to 24 years of age reached 98.29 per cent in 2015.¹⁵ Despite this, in the 2015 PISA, Thailand placed fifty-fourth out of 72 countries.¹⁶ A recent report in the Bangkok Post suggests that these results ‘reflect serious disparities between students in well-known schools and students in rural areas’.¹⁷

The government currently allocates 4.3 per cent of GDP (18.86 per cent of total expenditure) on education,¹⁸ but this figure has been erratic in recent years. The regularly changing governments, coups and interim leaders have been responsible for spending on education fluctuating dramatically (see Figure 4).

Figure 4: Percentage of GDP spent on education in Thailand, 2006–2013¹⁹



¹⁴ <https://www.classbase.com/Countries/Thailand/Education-System>

¹⁵ <http://uis.unesco.org/en/country/TH>

¹⁶ <http://uk.businessinsider.com/pisa-worldwide-ranking-of-math-science-reading-skills-2016-12>

¹⁷ <http://www.bangkokpost.com/learning/advanced/1163240/thai-education-fails-the-test-while-singapore-and-vietnam-excel-why->

¹⁸ <http://uis.unesco.org/en/country/TH>

¹⁹ <http://uis.unesco.org/en/country/TH>

Along with reports of erratic allocation of funds, as well as allocating mainly to high-achieving urban schools, the government's education reform policy has also been heavily criticised by the media in Thailand.^{20 21} In a recent *Nation* report, the Thailand Future Foundation executive chairman Sethaput Suthiwartnarueput claimed that it was, 'management, curriculum and teacher quality' that needed to be addressed in order to increase the quality of school education in Thailand.²² UNESCO and the OECD have written a report, recommending that education in Thailand is tackled in four ways: through curriculum development, improved and comprehensive assessments, teacher training, and the creation of a comprehensive information and communications technology strategy for the twenty-first century.²³

Higher education

Universities in Thailand are both privately and publicly run, and both are subjected to government assessment. There is a perception among Thais that public universities are 'better' than private universities, but the quality of education provided varies from university to university. A recent ICEF Monitor article 'Thailand's growing supply-demand gap in higher education' highlights the effect that the low birth rate is having on students enrolling in higher education, reporting that this number has started to decline.²⁴ According to ICEF Monitor, 'the high point was in 2010 when just under 2.5 million students were enrolled in tertiary education. Total enrolment has trended downward in the years since and was just over 2.2 million in 2015'. The report continues (citing a *University World News* article), 'about 80,000 Thai students applied to sit the national university admissions exam in 2016, down from 100,000 the year before'. This issue of supply and demand is problematic for universities in Thailand and can be seen in courses closing at Thai universities. In May 2017, however, the Thai government announced legislation that would allow 'high potential' foreign higher education institutions to set up campuses in Thailand. What this will mean in practice, and whether there will be an appetite for this (from both the students' and the providers' points of view), remains to be seen.²⁵

A surplus of university places for Thai students in Thailand may seem worrying for overseas recruitment, but there are opportunities to be taken. With the Thai government's drive for upskilling, to fulfil the vision of Thailand 4.0 (the government's scheme to future-proof the Thai economy), specialist higher education overseas is still in high demand.

The British Council SIEM report supports this: 'While the school-age population is in decline, Thailand has the potential to grow as a sending country in the future as

demand for high-quality education grows, incomes rise, and education pathways open up'.²⁶

English in Thailand

A tourist in Bangkok may get the impression that the level of English in Thailand is high; in the tourist areas of Bangkok it is unusual to encounter many English language problems in hotels and restaurants, and signage and menus are written in English. Thai children learn English in schools, but the emphasis is on grammar and structures and, like many Asian countries, the opportunity to practise English in class is lacking. There is a movement to change this, as a British Council Country Brief Report in 2017 found:

Language proficiency, including English proficiency, has been highlighted by the new government as an essential skill in preparation for the formation of the ASEAN Economic Community and, in 2015, schools began to adopt the Common European Framework of Reference for Languages (CEFR).²⁷

The progress of English language proficiency in Thailand has been highlighted in the recent 2017 EF Proficiency Index report which, despite defining the English proficiency in Thailand as 'low', has seen improvement on the previous year by 2.57 points, making it the most improved score in the region.²⁸

There are opportunities to supplement school English language learning with more communicative styles of teaching, such as with private tutors and after-school and weekend classes with private language schools such as the British Council and Wall Street English. The British Council Thailand teaches English to over 6,000 students every year and is very well known among agents and students.

According to the British Council, in the 2014 IELTS (academic) examinations Thai students scored 5.9 on average, in line with the world average in that year. Thai children, in the cities at least, have a grasp of English, but to fulfil the government plans of Thailand 4.0 and their universities' policy of increasing international programmes, students will need better speaking and listening skills.

3.4 Study abroad

It could be argued that the Thai royal family have helped with the popularity of studying abroad. King Rama VI studied in England between 1893 and 1903, and King Bhumibol was born in the USA, as his father was studying at Harvard University at the time. The young king was then educated in Switzerland and was revered for his international outlook and careful balance of promoting western and eastern cultures.

²⁰ <https://www.bangkokpost.com/learning/advanced/1259777/educational-inequality-in-thailand-the-challenge>

²¹ <https://asiancorrespondent.com/2017/05/thailand-education-reforms-elusive-ever/>

²² <http://www.nationmultimedia.com/national/Thai-education-reforms-slammed-as-expensive-and-da-30293645.html>

²³ <http://www.oecd.org/countries/thailand/education-in-thailand-9789264259119-en.htm>

²⁴ <http://monitor.icef.com/2017/10/thailands-growing-supply-demand-gap-higher-education/>

²⁵ <https://siem.britishcouncil.org/insights-blog/thailand-floats-possibility-of-branch-campuses-how-attractive-opportunity>

²⁶ <https://ei.britishcouncil.org/educationintelligence/country-brief-thailand-2017>

²⁷ <https://ei.britishcouncil.org/educationintelligence/country-brief-thailand-2017>

²⁸ <http://www.ef.com/~/media/centraleftcom/epi/downloads/full-reports/v7/ef-epi-2017-english.pdf>

In a Thai Embassy article, written after the king's death, the author states,

In less than a decade, from 1959 to 1967, His Majesty, accompanied by Her Majesty Queen Sirikit, visited 27 countries. He met with important leaders of the world, reaffirmed ties forged in Europe during the time of Rama V, addressed the US Congress, and placed a small country like Thailand firmly on the international map.

The article continues,

*After that period of international travel, His Majesty returned to Thailand and never travelled abroad again. When asked why, His Majesty responded that He wanted to understand Thailand better in order to help the Thai people.*²⁹

It cannot be underestimated how much the Thai people have been influenced by King Bhumibol. Travelling and understanding other cultures in order to be a better citizen is important, and those who can afford it will take advantage of travel and study opportunities.

Study abroad: higher education

According to UNESCO data, in 2015, 28,339 Thai students went overseas to study higher education courses. The most popular English-speaking destinations were the USA (7,052 students), the UK (6,246) and Australia (4,751). New Zealand attracted 451 students, Canada 447 and Ireland 13.³⁰

The Higher Education Statistics Agency (HESA) ranks Thailand as the ninth non-EU country to send students for higher education to the UK.

Table 3: Top non-EU countries sending students to the UK

	Country	2015-16	2014-15	2013-14
1	China	91,215	89,540	87,895
2	Malaysia	17,405	17,060	16,635
3	USA	17,115	16,865	16,485
4	India	16,745	18,320	19,750
5	Hong Kong	16,745	16,215	14,725
6	Nigeria	16,100	17,920	18,020
7	Saudi Arabia	8,570	8,595	9,060
8	Singapore	7,540	7,295	6,790
9	Thailand	6,095	6,240	6,340
10	Canada	5,980	6,075	6,350

Source: HESA First Statistical Release 242 (2015–16)³¹

Study abroad: ELT

According to English UK data, the number of student weeks from Thailand in member centres has fluctuated in the past 12 years. 20,514 weeks were recorded in 2005; this increased to 43,215 weeks in 2014 and dropped to 26,186 in 2015. The 2014 spike can be attributed to the change in academic year (see below) where every university student had a six-month break. During this period, the market has remained, on average, the seventeenth-placed nationality for English UK members.

Thai English language students in the UK, some facts:

- Student weeks in 2005: 20,514
- Student weeks in 2014: 43,215
- Student weeks in 2015: 26,186
- Student weeks in 2016: 20,685
- Predicted growth for 2017 as a result of the weak pound
- Average length of stay 6.3 weeks
- Thailand is the seventeenth-placed nationality for English UK member centres.

3.5 The Thai academic years

Public high schools in Thailand have their holidays in October, March, April and May, but the dates vary from school to school. Universities used to follow this pattern too, but, in 2014, the term dates for universities in Thailand changed to an August–May academic year, to be in line with other ASEAN countries. That year, Thai university students stopped their classes in March and did not return to university until September. The UK ELT industry benefited from this five-month break, with a 65 per cent increase in student weeks from the country.³² This was, however, a one-off phenomenon, and the student weeks returned to usual numbers the following year. There are currently no government plans to change the school academic year, and this is said to be because many rural schools do not have air-conditioning, and so during the Thai hot season students would not be able to stay inside the school and study.

3.6 Digital communications

According to a Bangkok Post article in May 2017, the use of social media in Thailand is growing.³³ It reports:

As of May 1 (2017), social media users in Thailand on Facebook, Instagram and Twitter were up an average of 20 per cent year-on-year, rising to 47 million, 11 million and 9 million respectively... (and) Bangkok also remains the world's biggest city for Facebook users in 2017 with 27 million users.

²⁹ <http://www.thaembassy.org/amman/en/information/6765/74478-Thailand's-International-Monarch.html>

³⁰ <http://uis.unesco.org/en/uis-student-flow>

³¹ [https://institutions.ukcisa.org.uk/Info-for-universities-colleges--schools/Policy-research--statistics/Research--statistics/International-students-in-UK-HE/#International-\(non-UK\)-students-in-UK-HE-in-2015-16](https://institutions.ukcisa.org.uk/Info-for-universities-colleges--schools/Policy-research--statistics/Research--statistics/International-students-in-UK-HE/#International-(non-UK)-students-in-UK-HE-in-2015-16)

³² English UK Student Statistics Report 05/2016

³³ <https://www.bangkokpost.com/tech/local-news/1255198/thai-love-affair-with-social-media-endures>

The report also says that Thais use Facebook most regularly on weekdays and on Saturday evenings, between 6 p.m. and 11 p.m.³⁴

The 2017 British Council Country Brief for Thailand examined social media use in the country further.³⁵ The report found that:

- Mobile penetration is high, with 150 subscriptions for every 100 of the population.
- Mobile broadband is a cheaper way of accessing the internet: in 2015, there were 5.9 million fixed broadband subscribers, amounting to only 8.7 connections for every 100 of the population. Access to mobile internet has increased as handset prices and the cost of data contracts have fallen and 3G networks have expanded.
- 47 per cent of the population are active users of social media.
- 40 per cent use social media on a mobile device.
- The most popular social media platform is Facebook (26 per cent of the population are active users), followed by Google+ (17 per cent), Twitter (13 per cent) and Instagram (12 per cent). Video site YouTube is the most popular website, while Pantip, a discussion forum, is the fifth and Blogspot the sixth most-visited site in Thailand.
- Chat app Line is frequently used, along with Facebook Messenger and WeChat.
- Students are active online on social media as well as on sites such as Dek-D, Pantip and O2Dual.

3.7 Thailand 4.0

Thailand 4.0 is a government scheme to ‘free Thailand from the middle-income trap, making it a high-income nation in five years’, according to the ASEAN Economic Community Strategy Centre at the University of Thai Chamber of Commerce (UTCC).³⁶ The article *Thailand 4.0: Are we ready?*, written in January 2017, explains that Thailand 1.0 was the agricultural era, 2.0 was the light-industrial era, 3.0, the heavy-industry era, and now the economy needs to shift to concentrate on high-tech industries and innovation. There are already concerns that automation will lead to high unemployment and there is a lack of training for new, specialised roles.

Thailand 4.0 has four objectives³⁷:



1. Economic prosperity: with innovation, technology and creativity, Thailand will create a value-based economy by:

- increasing research and development expenditure to 4 per cent of GDP
- increasing economic growth rate to full capacity rate of 5-6 per cent within five years
- increasing national income per capita from 5,470 USD in 2014 to 15,000 USD by 2032.



2. Social well-being: realising the full potential of every member of society by:

- reducing social disparity from 0.465 in 2013 to 0.36 in 2032
- completely transforming the social welfare system within 20 years
- developing at least 20,000 households into “Smart Farmers” (using technology with agriculture) within five years.



3. Raising human values: transforming the people into “Competent human beings in the 21st Century” by:

- raising Thailand’s Human Development Index from 0.722 to 0.8 or the top 50 countries within ten years
- ensuring that at least five Thai universities are ranked amongst the world’s top 100 higher education institution within 20 years.



4. Environmental protection: create an economic system that is robust to climate change by:

- creating a low carbon society
- developing at least ten cities into the world’s most liveable cities
- reducing terrorism risk.

³⁴ <https://www.bangkokpost.com/learning/advanced/1255403/thailand-in-social-media-worlds-top-10>

³⁵ <https://ei.britishcouncil.org/educationintelligence/country-brief-thailand-2017>

³⁶ <http://aec.utcc.ac.th/thailand-thailand-4-0-are-we-ready/>

³⁷ <http://thaiembdc.org/thailand-4-0-2/>

In a 2017 article, The PIE News investigated how the Thailand 4.0 strategy could affect transnational education (TNE) opportunities for overseas educational institutions. The government acknowledge that the specific skills training that overseas institutions offer are likely to accelerate the strategy, rather than sabotage it. The article states that the government is particularly interested in international vocational programmes, and that Thai universities can see this an opportunity to partner with overseas universities, not compete with them.³⁸

Thailand 4.0 is about progressing the country in a positive direction and, after years of fighting and instability, slow economic growth and widening inequality, this can only be a positive sign.

³⁸<https://thepienews.com/news/thailand-open-up-to-foreign-institutions/>

4 Part Two: Opportunities and barriers to student recruitment

This section contains research from a questionnaire answered by 29 Thai agents, a short student survey answered by 30 Thai students in the UK, and in-depth interviews with agents and faculty of Thai universities in Bangkok and Chiang Mai.

4.1 Culture

Thailand shared cultural traits with other Asian countries. Society is hierarchical, elders are respected and teachers are viewed as infallible. *Wan wai khru* is a ritual held at the beginning of the school year to honour teachers and includes a part where students crawl on their hands and knees with their heads bowed. This strong deference towards teachers has been identified as one of the factors contributing to the slow speed of change in educational reform. Teachers are not questioned or challenged by students; disagreeing with the teacher is not seen as appropriate, so learning and developing remains one-way.

Robert McKenzie, Deputy Director of Vatel at Silapakorn University in Bangkok (and British ex-pat of many years) observes that harmony and collectivism and 'maintaining the status quo' are at the core of Thai culture. In education, too, networks and connections through classmates at universities build up life-long relationships. In business, being introduced to a prospective client through a well-connected contact can open doors.

Collectivism also extends to Thai students choosing the same destination as their friends, or someone who has recommended an institution to them. Social media has grown these word-of-mouth communities, and many young Thais see these recommendations as essential in their research before going abroad.

Humour is important in Thai culture, as it is used to make people feel at ease and to diffuse tense situations. The president of the Thai International Education Consultants Association (TIECA), Annop Kanthatham, observes that it is similar to British humour: dark and mocking, but only with people you feel will appreciate it. 'We laugh with you, not at you,' Ketsara Labpornsirikul, Director of Target Education, explained.

4.2 The ELT market

The markets that the majority of agents deal with are individual adults and groups of juniors. 76 per cent of agents surveyed said the UK is the most asked for destination, and the most popular regions are London, the South/South East, Central, the North and the South West. When asked about their UK knowledge, agents were less familiar with Scotland, Wales and Northern Ireland. All agents identified General English as the most requested course, and most agents said it was unusual to have requests from students for online or blended courses. Many Thai agents, however, are looking for more to offer their students. Thanyarat Mathasuriyapong, General Manager of SBC Abroad, Bangkok, says, 'I don't just want a language school. I want something else... (for a school to) add value.' She explained that some UK language schools organise classes at local British schools, which is becoming more popular.

The agents spoken to were quite divided over whether the UK is a good market for them or not, with equal numbers of

agents revealing that they are diversifying away from the UK compared to those wanting to move their Australian or American-focused agencies over to working with the UK. Acadex, a North American study abroad specialist in Bangkok will be changing their business model to include the UK from next year. 'The UK is the gateway to Europe, so good for students who want to travel', explained Arthasit Siriratanaana, Managing Director at Acadex.

The economy is a subject that many agents spoken to were concerned about, in particular the economic uncertainty after the king died. 'The economy is stable now,' Kate from agency Trans World Education reported. 'People are willing to spend on credit.' Ketsara Labpornsirikul, Director of Target Education, Bangkok, voiced her worries about the gap between the rich and the middle classes. She has experienced more and more parents wanting to pay in instalments, which is a recent change, but she was more optimistic talking about the future. 'The government have their Thailand 4.0 policy to increase skills and knowledge. The new generation want to go abroad...and there is a new generation of parents.' Tina Alibaya from PASA agency confirms this. 'The economy is still the same. People still have money and want to invest in quality education.'

Four agents who were asked also recruit students from Laos and Cambodia, which could provide further opportunities for UK institutions.

4.3 What Thai students want

From an online survey of 30 students currently studying in the UK, the majority said they have had a positive experience and they would recommend studying in the UK to their friends. The students were aged 9–33, studying in British Council accredited centres in London, Manchester, Torbay and Aberdeen. These students are learning English mainly for their future studies (63 per cent) and claim that they made the final decision on where to study (67 per cent), as opposed to being told by their parents (30 per cent) or their agent (3 per cent).

Reasons given for studying in the UK, instead of another country, ranged from wanting to 'learn proper English accent' (21 per cent), to 'because a family member either lives or lived here before' (14 per cent). Just 'loving everything UK' was the reason given by 32 per cent of students.

According to the 29 agents asked, the top factor that their students consider when choosing a destination to study was price, followed by 'going to a well-known destination'. Safety was the third most important factor, with quality of teaching, good facilities and accommodation also being high among the concerns of Thai students.

Location is important for Thai students, and of the 30 students surveyed, 23 per cent said that a recommendation from their friends and family helped them decide. Unsurprisingly, teacher recommendation was high among these students, but the survey included a school group, so this would be expected. 23 per cent of students said that their own research resulted in them choosing the location they studied in, and that research included Google (50 per cent), YouTube (17 per cent) and Pantip (3 per cent).

The Thai market is price-sensitive; 93 per cent of agents say that a special Thai price helps to attract students, but most agree that competing only on price can damage the value of the institution.

4.4 Universities' perspective

Faculties from Thai universities are happy to speak to English language institutions about partnerships and study abroad programmes. Many do not work with agents but are happy to speak to educators about their programmes. Private universities may be easier to develop programmes with, but there are no barriers for any university to work with a British Council accredited centre if they wish to. Silapakorn University has a French tourism and management school situated inside their campus, and Finn College organises 2+1 university courses, where students study for two years towards a UK degree in Thailand and then transfer to a UK university to complete their final year and are then awarded a UK degree. There are also many smaller partnerships created by Thai universities, but, like many UK universities, these partnerships often lie with the individual academics or heads of department, so maintaining relationships is very important to keep the partnership going.

Study abroad opportunities with ELT institutions, in-country teacher training for EMI (English as a Medium of Instruction) and guest lectures from UK ELT teachers for both staff and students would all be interesting ways to work with Thai universities.

4.5 Accommodation

Homestay is the most popular accommodation option, but over 30 per cent of agents say their students also ask for halls of residence. Proximity to where they are studying is the most important factor for Thai students (89 per cent), according to their agents, with safety (74 per cent), price (67 per cent) and comfort (63 per cent) also being considered in choosing where to stay during their studies. TIECA's Annop Kanthatham advises marketers to think about the differences between Thailand and the UK with regard to getting around a city. Bangkok is a large, hot city, not suitable for long walks. It may be a great selling-point to a European, but, as Annop explains, 'only a 30-minute walk (to school) sounds like torture for a Thai who has never been overseas.'

4.6 Future recruitment to the UK

When asked if they thought that there would be more or fewer Thai students coming to the UK in the future, 41 per cent agents said there would be more, 28 per cent said there would be fewer and the remaining agents said they did not know.

Some agents are resolute that the UK offers the best education for Thai students, but many are disappointed that 'Thai students don't get much back from the UK' in comparison with competitor countries. Some agents were concerned about the UK not being as competitive as other countries and not allowing students to work during and after their studies. One agent remarked that 'the UK needs to come up with new products'. Another agent thinks that

Canada could become popular as it is becoming well-known for 'respecting foreigners, and students can work or stay after they graduate'. The weak pound is a driver for recruiting students to the UK, but there is concern regarding demographic changes in Thailand and uncertainty over the global economy.

4.7 Communication and social media

Agents will consult with an institution's website, brochure and marketing staff to obtain information. 85 per cent of agents want a printed brochure from institutions, with only one agent stating that a website is enough. 66 per cent of agents said that it does not need to be translated into Thai. All agents asked want schools to visit their offices at least once a year, but for general communication there was no pattern. Agents expect around 25 per cent commission.

When asked for a piece of advice for UK institutions, agents answers were varied, but keeping in touch was important. Common themes included making agents a close part of your sales team, being more communicative and responsive, and offering scholarships, discounts and good commission. Two agents said that creating videos of Thai students would be an excellent tool for showing the possibilities of a school to parents.

Using social media is very important for Thai agents. The most popular social media used are Facebook, Line, YouTube, Instagram, Google AdWords and their own websites.

Communication channels are sometimes tailored by agents for their different clients. Commonly, agents use Line to chat with students and parents, answer enquiries from students on Facebook and speak to parents on the phone. Email is used for all types of customers. Agents were very enthusiastic about those UK ELT institutions who use Line to respond to their quick questions.

4.8 Barriers to study in the UK

Visas

71 per cent of agents said the most common reason not to study in the UK is that visas are 'too difficult to obtain'. Price and safety were the next two most popular reasons.

Most agents say they have not had many or any visa refusals for the UK, but the process is very long and expensive. There was anger and frustration at the situation in the summer of 2017, when agents reported some students waiting up to 40 days for their Tier 4 visa. Other complaints are that if a student wishes to expedite their application to 'super priority' they must expect to pay the equivalent of around £920 GBP.³⁹ Agents also found the cost of calling for assistance in visa applications to be unhelpful and 'mean-spirited'. One agent likened the UK visa process to buying a ticket with a cheap airline; on the face of it, it looks good value and straightforward, but then everything else has an extra price.

The extra costs can cause negative feelings with both agents and students and has resulted in agents recommending New Zealand or Canada, rather than face another disappointment or upset student.

³⁹http://www.vfsglobal.co.uk/thailand/user_pay_services.html

Other comments from agents surveyed include:

The visa processing is very poor and unprofessional.

Very poor services at the visa application centres.

UKVI have made huge mistakes like delays in decision makings.

In 2007 UKVI reject many good students (wealthy students). Some agents now prefer NZ and USA. UKVI is now making money from visa applications.

One advantage that the UK does have over other destinations is that the British Council Thailand organises briefing sessions with agents and UK Visas and Immigration (UKVI) to inform and guide them through the changing visa process. Many agents interviewed mentioned this as a very valuable service.

Naadiya Rawat, Compliance and Member Relations Manager at English UK, urges members to contact her if there are specific cases that need to be investigated. She advises that

English UK is able to raise any issues, such as delays or advice given by the VAC, directly with relevant officials at UKVI in London. Do get in touch promptly to ensure that all cases are dealt with immediately.

Australia is a popular destination for students in Thailand. Agents estimated that around 80 per cent of them specialise in the Australian market. The student visa is easy to obtain, permits students to work for 40 hours per fortnight and costs \$535 AUD.⁴⁰

Surachana Chalopathump, from agency SJC, is sceptical that the Australian visa will remain as popular, as she has witnessed many recent refusals. She says, 'The Australian visa is changing to be much stricter and now Thailand is considered to be high risk'. This may pose a problem for students who want to work while they study. Surachana has seen more students asking about New Zealand and sees this as a trend to come. In New Zealand, a student can work for 20 hours in term time and full-time during holidays.⁴¹

For studying in the USA, students can get an OPT (Optional Practical Training) Visa so they can work in their field of study for one year after they graduate. Students can also work 'on campus' if they are studying English, for fewer than 20 hours per week.⁴²

The UK visa situation and less-than-competitive offer of no possibility of work during or after studying (unless at a public-sector institution) continues to tarnish the UK as a study destination.

Price

Because of Thailand's wealth inequalities, only the rich and the middle classes can afford to study overseas. Rich families may not be affected by the price of a country, institution or course, but middle-class families will. It is obviously more expensive to live in the UK than in Thailand, but it seems to be the perception of the high cost of living in the UK which is the potential barrier. Agents spoke about how Australian schools were very good at communicating how reasonably priced goods and services are in their country. UK schools, on the other hand, were seen to only promote the discounts that their institution was offering and not communicate about the wider expense of living in the UK.

The UK has a reputation for being expensive and Australia for being cheap, but this difference is not true in reality. The PIE News reported in October 2017 that Sydney, Australia, was now the most expensive city to study in, outside the USA. Boston, New York and San Francisco lead the world for high monthly costs, followed by Sydney and then London.⁴³ Agents interviewed recommend that institutions promote the low cost of living and activities in their regions. Institutions could also direct students or agents to the British Council website money pages for budgeting advice.⁴⁴

Safety

Barriers that do not seem to have affected Thai students are UK politics and Brexit. Only one agent was worried that the lack of European students would result in classes dominated by Asian nationalities. Terrorism, however, was an issue that agents often mentioned in their interviews, especially in relation to big cities. Thailand is no stranger to unrest and terrorism, but the frequency of attacks has alarmed prospective students, according to many agents. Summer 2017 saw cancellations from junior groups, and the media reported that 'hate crimes are on the rise'.⁴⁵

⁴⁰ <http://www.englishaustralia.com.au/choosing-the-right-visa>

⁴¹ <https://www.immigration.govt.nz/new-zealand-visas/apply-for-a-visa/about-visa/full-fee-paying-student-visa>

⁴² https://www.internationalstudent.com/study_usa/preparation/student-visa/

⁴³ <https://thepienews.com/news/sydney-is-most-expensive-city-to-study/>

⁴⁴ <https://study-uk.britishcouncil.org/planning/money-costs>

⁴⁵ <https://www.thenation.com/article/in-britain-terrorism-is-a-two-way-street/>

5 Part Three: Marketing and recruitment for ELT institutions

5.1 Marketing tactics

The role of the student

Students research information about an institution or destination from the internet, particularly YouTube, Facebook and Google. Online communities on recommendation sites like Dek-D, aimed at high school students, and Pantip, featuring mainly university-aged students, are very popular for students to find information and advice. Typically, a student gathers information and opinion and presents this to their parents so to convince them that their chosen destination is the most suitable. Institutions can ask Thai students to write reviews and comment on others' feedback to promote their courses and destination.

The role of the agent

According to data from the English UK Quarterly Intelligence Cohort (QUIC),⁴⁶ 95 per cent of students from Thailand come through an agent, which is much higher than the global average of approximately 80 per cent. Agents are highly trusted by both students and parents, they have a strong and well-organised association – TIECA – and they are often invited to events by UKVI to be briefed about visa changes.

The role of the agent is not just to give out information and advice, but as someone who may be asked to be the conduit between the two decision-makers: the student and the parent. Several agents involved in this report say that being asked by a student to convince their parents on their behalf it is a regular occurrence.

The role of the parent

The students make the choice, but the parents make the decision.

Atthasith Chuanpipatpong, Director of the International Center, Bangkok University

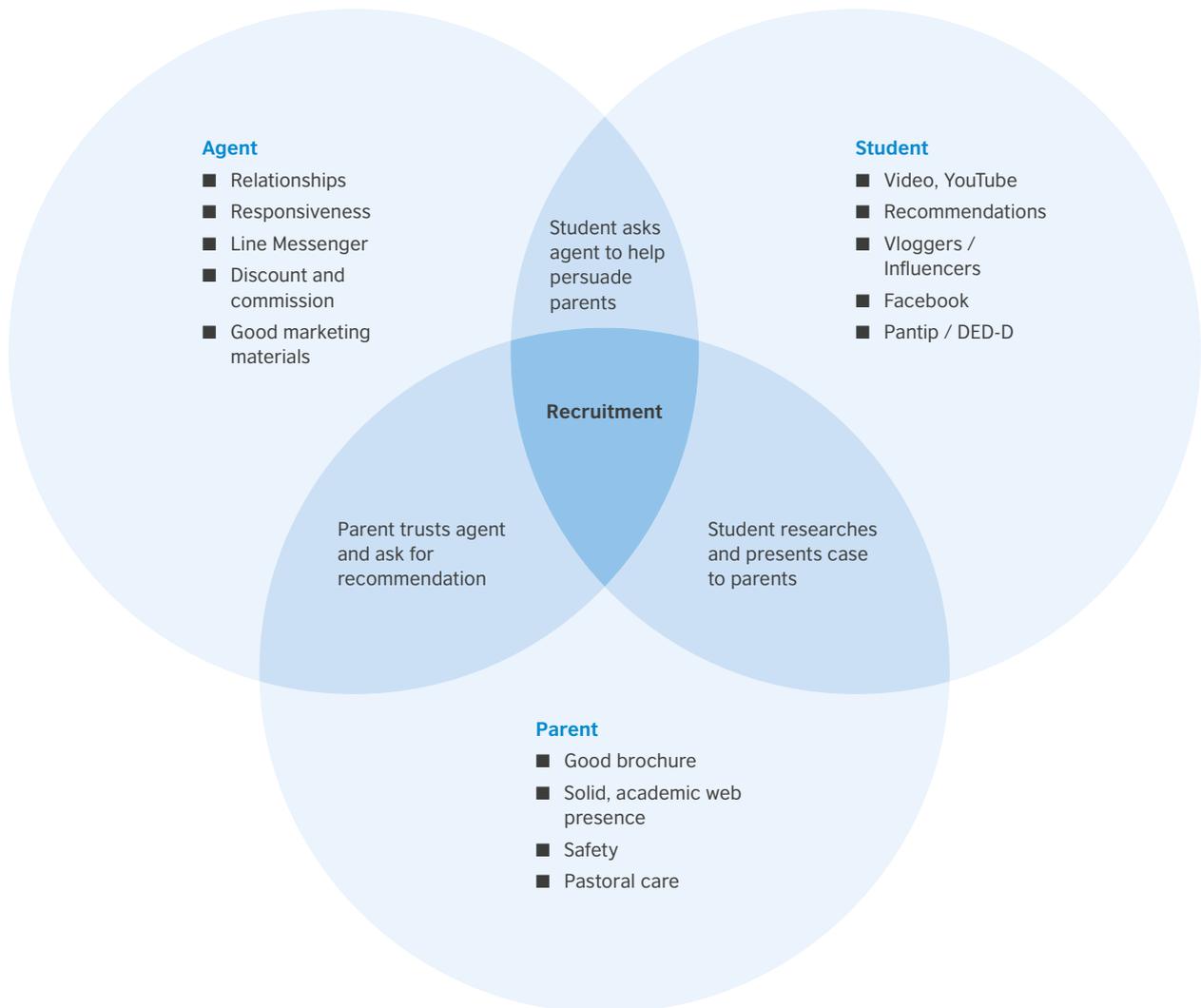
The influence that Thai parents have on their children, well into adulthood, is very strong. Parents provide financial and emotional support and give their opinion and advice: their decisions are final. These strong family ties can be a barrier for students to study overseas and are why, according to several agents spoken to for this report, the one-year UK masters is so popular. Parents earn money to spend on their child's education and, for many, this means giving their offspring the opportunity to study overseas – but not for too long. The perceived disadvantage of studying in the UK can be reframed, explained a Bangkok-based agent:

If a child goes to the UK, they cannot stay, they must come back after one year, and this is good for parents.

When deciding on marketing tactics for the Thai market, it is important to understand the relationship between the three main stakeholders and to ensure that marketing activities cover all three. Figure 5 suggests some activities and considerations for each group, and highlights the relationships in terms of the decision-making process which leads to student recruitment.

⁴⁶ English UK Quarterly Intelligence Cohort 2017

Figure 5: Factors in the recruitment decision-making process



Commission and discount

Anawat Yimkaew, from agency Smile Campus, thinks that there are two different types of UK ELT institution marketing themselves in Thailand. According to Anawat and other agents interviewed, the first is the large chain school that has in-country representatives. These representatives are usually Thai speakers and can act as part of the agent’s sales team, used to close deals by speaking to or meeting parents. These schools offer high discounts and extras to students; for example, free travel, excursions or gym membership. The second type is the independent school. According to agents, they have clearer USPs and the relationship with the owner/principal is vital. The promise of quality, rather than discount, seems to be more important to students who choose this type of school. For the agents interviewed, contacting someone known for giving clear information and getting a quick response is very important. These schools do not offer much discount, but they do offer a good commission and the student feedback is always very good. Anawat says that independent schools should not offer too much discount as it devalues what they do offer. Annop Kanthathan from TIECA agrees. He says independent schools should not be ‘too aggressive as this looks desperate’.

Visiting Thailand

Agents like visits from UK institutions, as the agent survey showed. Anawat, from Smile Campus, which is based in Chiang Mai, explained that Chiang Mai is more of an ‘online market’ and suggested that overseas institutions should only visit Bangkok. Visiting agents and universities in Bangkok is straightforward. The efficient, air-conditioned public transport system is very good, but to visit some agents, taxis will be needed. Taxis are metered, air-conditioned and inexpensive. Many taxi drivers do not understand or read English, so a Thai map and the phone number of who is being visited is essential. Taxi drivers seem to want to please their passengers by telling them they know where they are going, although this may not be the case.

Bangkok residents like to joke that there are three seasons in Thailand: hot, hotter and hottest. Be aware of this when planning a visit. The wet season falls at a quiet time of year for agents, which is an advantage for making appointments, but heavy downpours may prevent travel by taxi or by foot.

TIECA’s Annop Kanthathan advises that marketers need not be too formal in their dress when visiting, and that a small gift from the school, or something British, is always appreciated.

The Thai market is very mature, so new institutions trying to establish relationships may find that agents are not looking for new schools. In this case, Annop recommends finding newer, 'keen' agents. The English UK Partner Agency Scheme,⁴⁷ or British Council Thailand, can help identify those agents looking for new partnerships.

Finding university staff to meet in Bangkok and Chiang Mai is straightforward, as faculty are often listed, with email addresses, on the university website.

Fairs, exhibitions and familiarisation trips

82 per cent of agents asked arrange or attend fairs and exhibitions in Thailand. The reasons given include 'to promote brand awareness' and 'to meet students and parents directly'. One agent commented that exhibitions are going out of fashion, another that they are not as effective any more as there is too much choice for students and parents.

The main B2C marketing events in Bangkok are run by the British Council (see Table 4).

Table 4: Main marketing events in Bangkok

Study UK GRAND Exhibition	January (two days)	13,000 students and parents	Mainly HE with an exclusive ELT zone and a B2B session: one-to-one meeting with agents
Study UK Mini Exhibition	July (one day)	1,500–2,000 students and parents	Mainly HE
Schools and Colleges Fair	October (one day)	500–800 students and parents	Mainly boarding schools, colleges and undergraduate

ALPHE Asia, a B2B workshop held in February each year, attracts around 50 Thai agencies as well as agents from 13 other countries. The event is supported by TIECA.

Social media and communications

Many agents mentioned 'Line Messenger' as their preferred method of communication with students, parents and overseas marketers. Agents often have their Line QR code or ID on their business cards. Annop Kanthathan from TIECA explained that email was seen as a secondary method of communication now, and that, 'Marketers need to be on Line Messenger so we can get an answer immediately'. Facebook was also seen by agents as essential.

Using influencers

Most agents do not work with universities to recruit students, but they do use influencers to market their agency. A 2017 Forbes report that examined millennials and their influencers concluded that 'millennials trust their social media tribes and peer-to-peer advice the most'. The report cited a study commissioned by Defy Media which found that 63 per cent of respondents aged 13–24 said that they would try a brand or a product recommended by a YouTube content creator.⁴⁸ This statistic is particularly interesting in terms of Thai culture, where use of social media is high and acting on

word-of-mouth advice, offline or online, is an important part of buyer behaviour.

Thai YouTuber and GoUni agent, Pitchaya Chaychana, (YouTube name Peachii) explains further why influencers are such an important part of youth culture:

- Unlike ambassadors or presenters, the content that influencers produce is fresh and original, communicated in their own style to their own followers.
- The fact that they are not A-list celebrities makes them more relatable and appear less commercial.
- Thai people value recommendations from friends and family and enjoy the same sense of belonging and approachability in influencers.
- The more that Thai youth spend online, the more the 'shareability' of the influencer's work gains power.

⁴⁷ <http://www.englishuk.com/partner-agency-directory>

⁴⁸ <https://www.forbes.com/sites/under30network/2017/06/20/why-youtube-stars-influence-millennials-more-than-traditional-celebrities/#1b4ae44a48c6>

5.2 Other opportunities to consider

Product development

'Wanting something different' was a common theme among agents when discussing what a UK institution could offer their students in the future. Agents are interested in selling products that students cannot find in Thailand. Be mindful of the Thai school year and the need for group courses in March–May and October if targeting high school children. Developing courses for university students could be done in conjunction with a university department in Thailand, or courses for school children could be jointly developed with a Thai school and agent.

Publishers

There are several UK-based ELT publishers who run workshops for Thai university academics in a part-CPD, part-sales event in Bangkok every year. Oxford University Press, Macmillan, Pearson and Cambridge University Press invite faculty to their one-day events, which are held in central Bangkok hotels once a year. UK ELT schools have not traditionally been involved in these days, but it could be an area of interest for some English UK institutions.

Teacher training

Kate from Transworld Education, a teacher herself, is concerned about the lack of CPD for Thai teachers. No CPD means that teachers cannot improve their teaching: 'Teachers want to go (abroad) but they need a scholarship as they are not paid well.' Suthasinee Sangkhum, Associate Dean for International Affairs and Strategic Partnerships at Rangsit University, Bangkok, agrees that there is a need for teacher training but warns that it is a sensitive subject. Teachers are unused to being told that they need to train, and money is not often available for such training. Approaching schools and universities with a teacher training course may be met with silence. 'Teachers feel uncomfortable with this,' Suthasinee explains. 'Offers need to be positioned in a friendly way, along with a good business model.' Knowledge exchange, guest lectures at universities and exchanges between teachers may be better received.

Transnational Education (TNE)

Opening a UK institution in Thailand is not straightforward because of Thai laws for foreign-owned campuses but, as mentioned before, this could be changing. Robert Mackenzie of Silapakorn University warns:

(as the law stands) if setting up a campus in Thailand, the institution must have at least 51 per cent Thai ownership, or offer courses not currently offered in Thailand – which is a grey area.

Robert advises that the easiest way to arrange TNE is to partner with a Thai university. There are more than 30 universities in Bangkok and five in Chiang Mai. One reason that a Thai university may be looking to work with a UK institution is that the government requires that a proportion of all university courses need to have an English language component. Abhibhu Kitikamdhorn, International Relations Officer at the Faculty of Mass Communication, Chiang Mai University, explains:

Last academic year, five per cent of all courses had to have activities involving English, (the types of activities depend on the lecturers) and each year the rate will be gradually increased (so) this year it is 10 per cent and next year will be 15 per cent.

All new courses introduced at university must be 'international', which means delivered in English. This can be phased in over a period of three years if the faculty is not ready for this change. Some universities are concerned that their faculties are not prepared to deliver their courses in English, and some are concerned that their students are not ready. This provides potential for both private and state-sector accredited centres.

5.3 Toolkit/checklist

Considering the research and recommendations in this report, there are steps that institutions can take to increase the chances of recruiting more Thai students. These tactics include:

- ensuring your marketing materials (brochure, website, videos, etc.) reach the three main stakeholders of student, parent and agent.
- taking advantage of the importance of social media reviews of your past Thai students, specifically on Dek-D for high school students and Pantip for university-aged students.
- helping agents understand your school by delivering appropriate marketing materials to them, visiting them and inviting them to your institution with familiarisation trips.
- making sure that any discounts or scholarships match your brand.
- allowing agents to communicate with your institution by using their preferred methods; for example, by Facebook or Line Messenger.
- planning regular visits and communication with agents and partners.
- creating partnerships with Thai universities and schools, as they may be open to joint product development, projects or study abroad opportunities.
- volunteering to give lectures or workshops at Thai universities to create a mutually beneficial partnership.
- participating in B2B and B2C in-country ELT workshops and fairs, but expanding this research into other possible collaborations such as publishing or tourism industry events.

5.4 Create your tool kit



Digital checklist

- **Dek-D:** ask your high-school-aged students to review your institution.
- **Pantip:** ask your university-aged students to review your institution.
- **Line:** marketers should install and use this app to communicate with and respond to agents.
- **Video:** make sure your videos are engaging and include lots of testimonials from students (especially Thai students).
- **Website:** this needs to be clear and visual, and include videos.



Essential contacts

- **Search:** lists of universities in Bangkok and Chiang Mai for a comprehensive list, often with email addresses of faculty members.
- **Contact** TIECA for their agent list
- **Research** Thai social media influencers:
 - General information on influencers in Thailand, including a list of the most famous⁴⁹
 - For an example of UK education recommendations on YouTube, search for Peachii.
- **Investigate** familiarisation trips in regions by contacting English UK, your regional English UK group and British Council Thailand.
- **Consider** B2C events for reaching students: British Council Fairs.
- **Consider** B2B events for reaching agents: English UK regional fairs, ALPHE Asia workshop.
- **Investigate** educator events for reaching ELT professionals in Thailand: Thailand TESOL International Conference.

⁴⁹<http://starngage.com/influencer-marketing-thailand>

5.5 Planning your visit

Table 5: Main events and days of note in Thailand

Times of year to visit agents	Events / agent considerations	Public holidays / Days of note (2018)	Climate (Bangkok)
January	British Council Fair Thailand TESOL International Conference	1: New Year's Day (NH)	Cool season
February	ALPHE Asia	16: Chinese New Year	Cool season
March		1: Makha Bucha Day (NH)	Very hot
April		6: Chakri Day (NH) 13–17: Songkran (NH) 30: Public holiday (NH)	Very hot
May		1: Labour Day (NH) 29: Visakha Bucha Day (NH)	Very hot
June			Very hot
July	British Council Fair	27: Asahna Bucha Day (NH) HM King's Birthday (NH)	Rainy season
August		13: HM Queen's Birthday (NH)	Rainy season
September	Many agents are less busy		Rainy season
October	British Council Fair	13: anniversary of the death of King Bhumibol (NH) 23: Chulalongkorn Day (NH)	Rainy season
November	English UK Regional Fair, Asia Pacific		Cool season
December		5: King Bhumibol's Birthday (NH) 10: Constitution Day (NH) 31: New Year's Eve (NH)	Cool season

6 Conclusion

Thailand is an upper-middle-class country and it is wealthy in terms of total GDP and in comparison to other countries in the ASEAN Economic Community. However, that wealth represents only a small part of the population, and the inequality in wealth distribution can be seen most starkly between the urban and rural communities. Decades of serious political uncertainty and disruption have become the norm, as Thais look to their monarchy for consistency and stability.

However, the death of King Bhumibol Adulyadej in 2016 shook the nation, producing an unprecedented outpouring of grief and plunging the country into a year of mourning. The wider consequence of this is unknown, but there is a feeling of optimism with the Thai government introducing 'Thailand 4.0', a scheme which may improve the slow economic growth, disappointing education results and the effects of an aging population by supporting and improving high-tech industries and innovation.

For UK ELT, innovation within education can be found in partnerships with Thai universities. Faculties are welcoming of partnerships which will benefit both their students and staff, and which will help fulfil the universities' commitment to the government's internationalisation initiatives.

Despite the perception of the UK being expensive, the concern over terrorism and the unfavourable UK visa rules, the UK remains a popular destination for Thai students wanting to study English. The Thai market is mature and agent-driven but characterised by the complex dynamics between the agent, student and parents. Agents are highly trusted and often find themselves being asked by students to convince their parents of their choice of where to study. Students make their own decisions as to where they go, but their parents, who usually finance all their education, are also extremely important decision-makers in this process. Students engage in digital research, often prior to visiting the agent, using Google, YouTube, Facebook, Pantip and Dek-D. Their parents are influenced by an institution's brochure, website and videos, along with their child's presentation of their research and opinion. Agents rely on a strong relationship with the institutions and marketers, which will influence their recommendations when counselling students and parents. Getting this marketing mix right is vital for successful recruitment of ELT students to UK institutions.

The Thai market is rated as the seventeenth-largest nationality in terms of annual student weeks for English UK member institutions, and there is potential for growth. With the government pushing the internationalisation of their universities, the need for English language will only increase. Institutions can confidently secure a share of this through their understanding of the market conditions detailed in this report and by adopting the recommended tactics. Market trends, such as students' desire for learning English in the UK, the perception of many agents that the UK is an important ELT market, and the fact that Thai families are willing to invest significant money in their children's education, all indicate that the Thai market should be considered for development.

7 Appendix

7.1 Survey results

Online Thai agent survey (October 2018)

The majority of your students are:

27 out of 29 people answered this question

1	Individual adults	17 / 63%
2	Groups of juniors	8 / 30%
3	Individual juniors	2 / 7%
4	Groups of adults	0 / 0%

Which (one) country is the most popular for Thai students to enquire about?

26 out of 29 people answered this question

1	UK	20 / 77%
2	Australia	5 / 19%
3	Other	1 / 4%
4	Canada	0 / 0%
5	Ireland	0 / 0%
6	US	0 / 0%

Where in the UK do your students study?

27 out of 29 people answered this question

1	London	21 / 78%
2	South / South East	19 / 70%
3	Central England/Other	18 / 67%
4	North	9 / 33%
5	South West / Channel Isles	7 / 26%
6	East of England	4 / 15%
7	Northern Ireland	1 / 4%
8	Scotland	1 / 4%
9	Wales	1 / 4%

Do you have knowledge of any of these regions?

26 out of 29 people answered this question

1	London	24 / 92%
2	South / South East	20 / 77%
3	Central England	19 / 73%
4	North	15 / 58%
5	East of England	12 / 46%
6	South West / Channel Isles	12 / 46%
7	Scotland	9 / 35%
8	Wales	7 / 27%
9	Northern Ireland	5 / 19%

Do you work with Thai universities to recruit students?

26 out of 29 people answered this question

1	No	15 / 58%
2	Yes	11 / 42%

Which courses are your students interested in studying?

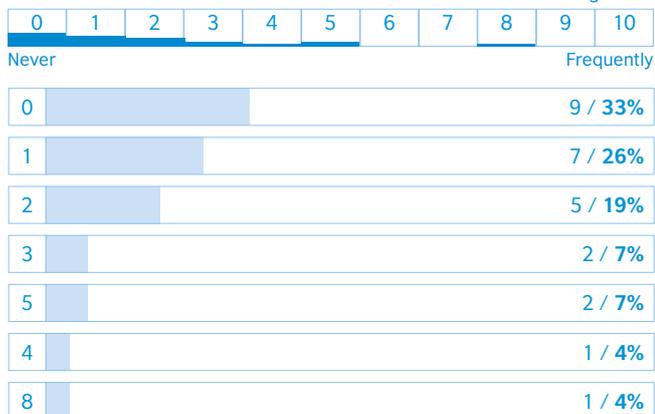
27 out of 29 people answered this question

1	General English	27 / 100%
2	Academic English	22 / 81%
3	Exam English (IELTS / FEC etc)	22 / 81%
4	Business English	10 / 37%
5	English Plus	8 / 30%
6	English for Specific Purposes (eg English for Aviation)	6 / 22%
7	One-to-one	3 / 11%

How often do your students request online or blended learning courses?

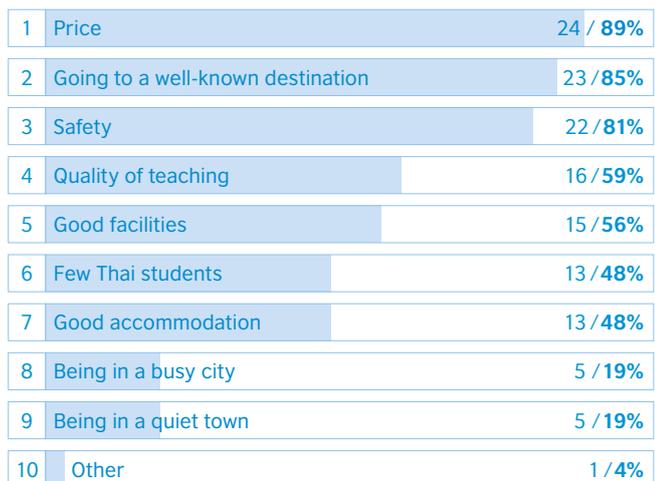
27 out of 29 people answered this question

Average: 1.67



What are the most important factors for Thai students when deciding their study abroad destination?

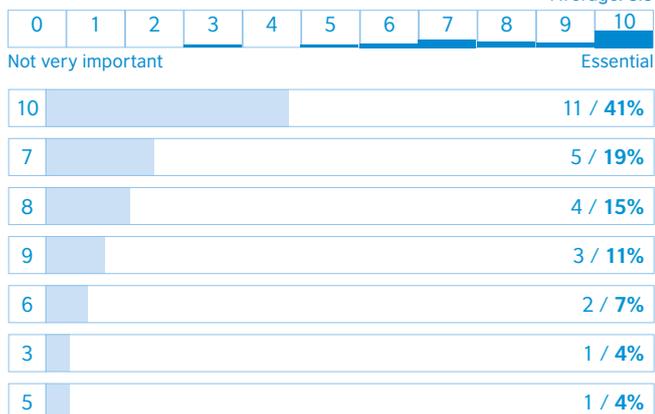
27 out of 29 people answered this question



How important is social media (YouTube, Facebook, Instagram, Snapchat etc) for students when choosing to study abroad?

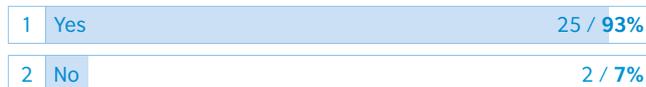
27 out of 29 people answered this question

Average: 8.3



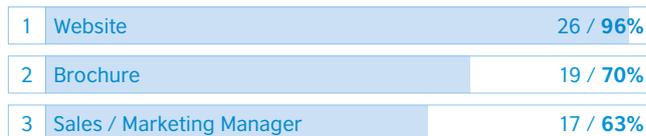
Do you need UK institutions to offer a special Thai price?

27 out of 29 people answered this question



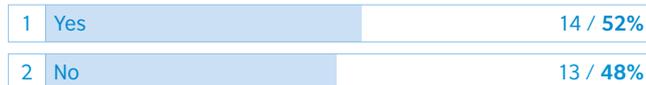
Where do you find information about the UK institutions?

27 out of 29 people answered this question



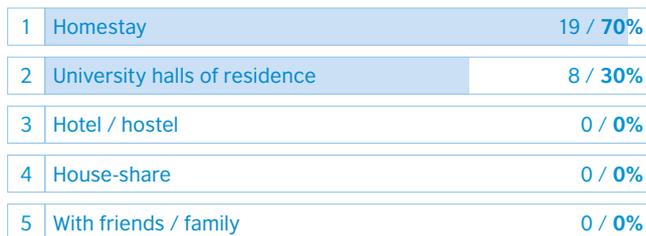
Do you use internet "influencers" / YouTubers to help market your agency?

27 out of 29 people answered this question



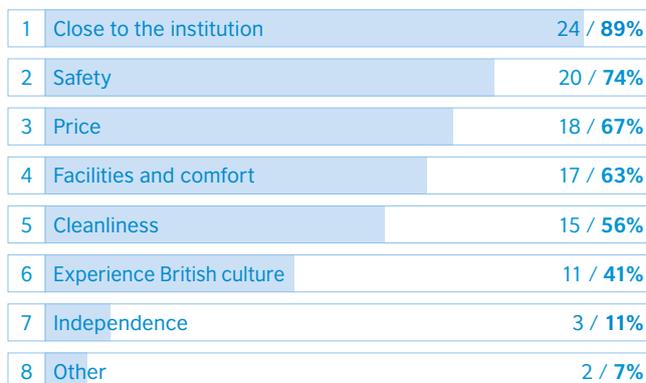
Which accommodation do Thai students choose the most often?

27 out of 29 people answered this question



What do Thai students want when looking for accommodation?

27 out of 29 people answered this question



How do Thai students buy their travel insurance?

27 out of 29 people answered this question

1	Through you, the agent	13 / 48%
2	Through the institution	10 / 37%
3	They arrange it themselves	3 / 11%
3	They don't have insurance	1 / 4%

Is it important for a school to have printed brochures, or is a good website enough?

27 out of 29 people answered this question

1	Need printed brochure	23 / 85%
2	Need only a website	2 / 7%
3	Other	2 / 7%

Is it important to have a brochure or website translated into Thai?

27 out of 29 people answered this question

1	No	18 / 67%
2	Yes	9 / 33%

How positive do you feel about counselling students to study in the UK?

27 out of 29 people answered this question

Average: 4.78

0	1	2	3	4	5	6	7	8	9	10	
Very positive					Very negative						
0											3 / 11%
1											3 / 11%
2											3 / 11%
3											3 / 11%
5											3 / 11%
8											3 / 11%
10											3 / 11%
7											2 / 7%
9											2 / 7%
4											1 / 4%
6											1 / 4%

What stops Thai students choosing the UK to study?

28 out of 29 people answered this question

1	Visa too difficult to obtain	20 / 74%
2	Price	17 / 61%
3	Safety	17 / 61%
4	Other destinations offer more	14 / 50%
5	Politics / Brexit	8 / 29%
6	Too far away	1 / 4%
7	Weather	0 / 0%

Online survey of Thai students studying in the UK (October 2018)

Why are you learning English?

30 out of 30 people answered this question

1	For my studies	19 / 63%
2	For fun	8 / 27%
3	For my job	6 / 20%

Why did you choose the town or city in the UK where you are studying?

30 out of 30 people answered this question

1	I researched myself and this town looked good	7 / 23%
2	My friend / family member recommended it	7 / 23%
3	My teacher recommended it	6 / 20%
4	It's famous	5 / 17%
5	My agent recommended it	3 / 10%
6	Other	2 / 7%

Who made the final decision about your studies in the UK?

30 out of 30 people answered this question

1	I did	20 / 67%
2	My parents did	9 / 30%
3	My agent did	1 / 3%

When you were researching your school in the UK, did you use:

30 out of 30 people answered this question

1	Google	15 / 50%
2	Other	7 / 23%
3	Youtube	5 / 17%
4	Instagram	2 / 7%
5	Pantip	1 / 3%
6	Facebook	0 / 0%
7	Other search engine	0 / 0%

Has your experience in the UK so far been positive?

30 out of 30 people answered this question

1	Yes	30 / 100%
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Would you recommend coming to the UK to learn English?

30 out of 30 people answered this question

1	Yes	30 / 100%
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7.2 Questionnaires

A questionnaire was sent out to Thai agents in preparation for this report, asking about the needs of their students, how they work with UK institutions and their opinions on the future of the popularity of ELT in the UK. Twenty-nine surveys were completed and returned. Respondents could remain anonymous, or they could leave their agency names. The named responses returned were from:

- Advice For You
- AIBC Thailand
- AU Study
- Country City Study Centre Co. Ltd
- Education Abroad Co. Ltd
- GoUni
- Hands On Education Consultants, Chiang Mai office
- Hands On Education Consultants, Bangkok
- IEC Abroad (Thailand) Co. Ltd.
- International Education Promotions, Bangkok
- Mentor International
- NES STUDY ABROAD, Chiang Mai
- PASA
- Selt INTER Education Company Limited
- Smile Campus (Bangkok-Nonthaburi)
- TWE
- Vision UK Education Centre
- Wisdom House Education
- World Plus Education

A survey was also sent out to Thai students already studying at accredited centres in the UK. Thirty surveys were returned from students studying at:

- BEET Language Centre
- Cardiff and Vale College
- Hilderstone College
- International House Aberdeen
- Kaplan International, Manchester
- LAL Torbay
- St Giles London Central
- Wimbledon School of English

In-country interviews were conducted with people from the following agencies, universities and organisations:

- Academix
- Bangkok University
- British Council Thailand
- Chiang Mai University
- Country City Study Centre
- Finn College
- Hands On
- Hands On, Chiang Mai
- Mentor
- Mentor, Chiang Mai
- OEC Global
- Pasa
- Rangsit University
- Silpakorn University
- SJC
- Smile Campus
- Supreme Business Centre
- Target Education
- TIECA
- Trans World Education
- York Institute

In addition, face-to-face interviews were conducted with Poi, a student at Chiang Mai university, and Natthaya, an ex-student of Torquay International School.

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The British Council is the United Kingdom's international organisation for cultural relations and educational opportunities.

English UK is the United Kingdom's national association for accredited English language teaching providers.