

DRAFT National Strategy for Export of Education Services



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Introduction

Objective

Services exports in Trinidad and Tobago currently amount to an estimated US\$ 861 million, of which the vast majority (75%) comprises tourism and transport. Therefore, commercial services exports (comprising financial, ICT, BPO, yachting, professional services, education, creative industries, fashion) amount to an estimated US\$ 215 million.

However, there is no official data on the exact composition of commercial services exports. Estimates based on industry surveys indicate that the export of education services in Trinidad and Tobago amount to US\$ million [to be inserted following survey results] based on fees and spending of thousand [to be inserted] foreign students studying in higher education, English language training (ELT) and technical and vocational education (TVE).

The overall objective of the Strategy for the Export of Education Services is to increase the number of foreign students studying in Trinidad to 7,500 students contributing an additional US\$ 62.5 million to services exports and the economy as a whole after 3 years and then growth of 20% per annum thereafter.



The Opportunity

NATIONAL CAPACITY

There are five universities/colleges in TT (University of the West Indies, University of Trinidad and Tobago, College of Science, Technology, Applied Arts of Trinidad and Tobago, St Andrews University and University of the Southern Caribbean) as well as 70 private tertiary education institutions. Amongst the tertiary institutions, around 12 of these provide courses aimed at foreign university examinations in UK, Canada and USA (student receive the qualification from the foreign university). In TT, there are some foreign students studying in tertiary education institutions, most predominantly UWI, which after all, is a regional institution. However, it is estimated that across these institutions, less than 5% are foreign students.

[Insert data on what services are currently exported, % ELT, HE, TVE and where the students come from both in numbers and value – use pie chart]

GLOBAL MARKET

The global market¹ for education exports is estimated at over US\$40 bn. An estimated 3 million students study full time higher education outside their home countries (this excludes exchange students) with an estimated value of US\$30 bn. In addition, over 1.3 million students travel to study English as a foreign language with an estimated market value of US\$ 10 billion². Finally, there is also a

¹ OECD, Education at a Glance, 2007

² Language Travel Magazine (2011)



growing market for travel for technical and vocational education, although no figures are readily available for this segment.

In terms of higher education, the main criteria for travel for education is availability of accredited places (especially in medical training where places in North America and Europe are increasingly scarce for even highly qualified students), quality of education (the qualification is internationally recognised), cost (value for money for the same qualifications is always a criteria), life experience (studying abroad can provide a new dimension and saleability in the job market post qualification) and safety/security (of the campus and country).

The number of students studying abroad is rising at over 15% per annum and the places available in the traditional global education destination (US, UK, Germany, France and Australia) are declining and visas are ever more difficult to obtain, even for genuine students. Therefore, there is an increasing opportunity for new destinations to emerge and attract these students.

Table 1: Global Education Destinations

| Top Host Destinations | Global Market Share |
|-----------------------|---------------------|
| United States | 22% |
| United Kingdom | 12% |
| Germany | 10% |
| France | 10% |
| Australia | 7% |
| China | 6% |
| Japan | 5% |
| Canada | 3% |
| Other | 25% |
| Total | 100% |

Source: OECD, *Education at a glance*, 2007

More than two-thirds of ELT students travelling for study originate from Asia (China, Korea, Japan and Taiwan). Following Asia, Europe (Russia and Italy) and Latin America (Brazil) represent significant markets for ELT. Factors for selection include cost, work permit restrictions (study and work), visa restrictions (ease and cost) and destination interest (eg Malta link ELT successfully to vacations in order to attract students).

The UK is the largest exporter of ELT representing over 50% of the global market followed by US, Canada, Australia and Ireland.

Table 2: Global ELT Destinations

| Top Host Destinations | Global Market Share |
|-----------------------|---------------------|
| United Kingdom | 54% |
| United States | 16% |
| Canada | 13% |
| Australia | 8% |
| Ireland | 6% |
| New Zealand | 2% |
| Malta | 1% |
| South Africa | <1% |



| | |
|-------|------|
| Total | 100% |
|-------|------|

Source: Language Travel Magazine (2010)

The British Council has undertaken research into global markets for ELT, including those taking ELT in their home country as well as travelling for ELT. Over the next 10 years, it estimates the increase in market demand for ELT at over 45 million students per year comprising China 22 million, India 16 million, Russia 4 million, Brazil 3 million and Poland 2 million. If only 5% of these elect to travel for ELT, then an additional 2.25 million ELT students will be looking for destinations around the world with the ELT export market tripling over this period. Trinidad and Tobago therefore has an opportunity, given existing schools and experience, to capitalise on this market.

VALUE PROPOSITION

Trinidad and Tobago's economy will generate revenue not only from tuition fees but also (and probably more importantly) from living expenses. Whereas a mainstream tourist stays two weeks, an education tourist stays for one month to one year (or more) spending every day.

For higher education, the annual average level of spending and contribution to the economy differs by exporting country, origin of the foreign student and of course length of course. In South Africa, the average spending per graduate student is US\$7,500 pa whereas in Antigua, US medical students average spending (including fees) amounts to US\$ 25,000. In Trinidad and Tobago, it is estimated that spending of US\$ 15,000 may be reasonable across a range of origin of higher education students.

English Language Training (ELT) and Technical and Vocational Education (TVE) generally comprise shorter stays ranging from 6-12 weeks. Again weekly spend and fees differ by country:

Table 3: Average spend and Stay for Foreign ELT Students

| Top Host Destinations | Spend per week (excl. fees) US\$ | Average Fee per Week US\$ | Length of Stay Weeks |
|-----------------------|-------------------------------------|------------------------------|-------------------------|
| United Kingdom | 594 | 405 | 6 |
| Ireland | 546 | 373 | 6 |
| United States | 330 | 309 | 13 |
| Canada | 518 | 237 | 15 |
| Australia | 368 | 234 | 17 |
| South Africa | 390 | 149 | 9 |

Source: Language Travel Magazine (2009)

If Trinidad and Tobago simply matched South Africa, then average ELT student may generate up to US\$ 5,000 to the economy (fees and spend). It is estimated that similar revenues (if not higher) could be gained from TVE.



Overall Approach

Specific targets **by end of 3 years:**

| | Foreign Students | Contribution to the Economy |
|------------------------------------|------------------|-----------------------------|
| Total increase per annum | 7,500 | US\$ 62.5 million |
| Higher Education | 2,500 | US\$ 37.5 million |
| English Language Training | 2,500 | US\$ 12.5 million |
| Technical and Vocational Education | 2,500 | US\$ 12.5 million |

In order to achieve these targets, a number of strategic goals and associated activities need to be undertaken:

1. Sector Wide Awareness and Promotion

- Establish Joint Marketing and Representation Office
- Awareness Raising and Destination Branding
- Lobby Government for Support and Legislative Changes
- Improving Sector Competitiveness

2. Promotion of Higher Education

- Conduct Student Recruitment Fairs in Target Markets
- Appointment of Education Consultants in Selected Markets
- Participate in International Recruitment Fairs
- Advertising and Awareness in Target Markets

3. Promotion of English Language Training

- Appointment of Agents in Selected Markets
- Conduct Student Recruitment Fairs in Target Markets
- Advertising in Target Markets

4. Promotion of Technical and vocational training

- Target Firms/Governments Globally by Specialism
- Advertising Regionally
- Conduct Student Recruitment Fairs Regionally



Strategic Goal 1: Sector Wide Awareness and Promotion

Specific Targets

Cooperation, coordination and awareness raising within Trinidad and Tobago and development of a national brand and identity for Trinidad and Tobago as a destination for education are essential to realizing the potential of the sector. Therefore, the initial strategic goal should focus on ensuring the sector can work together to promote their collective interests both within Trinidad and Tobago and globally. Although no quantitative target can be set as these activities will not directly generate incomes or students, the activities under this goal are necessary prior to implementation of other activities under the subsequent – that is, the target is a necessary condition:

The specific target for Strategic Goal 1: Sector Wide Awareness and Promotion will be to bring together education stakeholders in the public and private sector to establish a formal working body to drive forward the strategy and agenda of the sector.



The working body could be task force or association that would drive the agenda, but also act as the joint marketing office and representation of the sector. The impact of this would be sector cooperation in the national and collective interest to jointly promote education exports in higher education, English language training and technical and vocational training increased awareness nationally, sufficient support from government and the establishment of a conducive business environment for education exports in Trinidad and Tobago.

In order to achieve this target, a number of Activities are proposed

- ➔ Establish Joint Marketing and Representation Office
- ➔ Awareness Raising and destination Branding
- ➔ Lobby Government for Support and Legislative Changes
- ➔ Improving Sector Competitiveness

Establish Joint Marketing and Representation Office

AIMS

- To establish an organisation that represents fully the sector including public and private sector and each segment: higher education, ELT and TVE
- To agree common aims and goals including functions such as representation to government, national awareness raising and joint marketing of services
- To fully fund and sustain the organisation



OUTPUTS

1. Organisation is registered (whether it be a non-profit association, corporation with shareholders from public bodies and private associations or government agency)
2. Organisation is staffed, resourced and operating

ACTIONS

Task 1 – Facilitate Sector Meetings: Sector representatives need to meet to discuss willingness and scope of cooperation. The stakeholders could include public education facilities (universities, language schools, vocational training colleges), private universities and private sector associations representing higher education, ELT and TVE. In addition, Ministries such as Ministry of Science, Technology and Tertiary Education, BDC, Ministry of Trade and Industry and the Accreditation Council should also participate. Where representation does not exist, or representatives are uninterested in participation, selected private individuals may be asked to participate.

Task 2 – Define Scope of Activities for Proposed Organisation: The functions of the new sector organisation need to be defined by the stakeholders. The organisation will have two functions – to represent the sector (public and private sectors, ELT, higher education and TVE and; act as a marketing and promotion organisation for the sector. It would be a one stop shop for students coming to Trinidad and Tobago not only undertaking joint marketing and promotion, but also facilitate accommodation, transport and visa processing.

Task 3 – Register organisation and staff and resource: Once the scope and operations of the organisation have been defined, it needs to be legally established. The precise legal formalities will depend upon the type of institution itself, corporation, public body but preferably a non-profit organisation such as an umbrella association. Part of this process will be to develop a business plan for the organisation which includes identifying the sources of its income to adequately resource it, ensure its sustainability and recruit staff as required.

Task 4 – Develop systems for marketing: Once the organisation is established, the basic tools of its operations will need to be developed and designed: webpage; social media; directory of “client” institutions defining services, costs etc; audit and register of accommodation and others, as necessary.

Awareness Raising and Destination Branding

AIMS

- To promote awareness of the sector nationally, including the benefits to the economy so as to gain widespread support and understanding of the sector
- To develop an international reputation for Trinidad and Tobago as a education export destination

OUTPUTS

1. National Awareness Campaign



2. International Branding Campaign
3. Awareness raising events such as advertisements in international press (industry and non-industry), media coverage, participation in international conferences, editorials

ACTIONS

Task 1 – Basic research on sector: In order to be able to adequately promote the sector, it is important that it is understood fully. There is very little data, information and analysis of the education export sector in Trinidad. Therefore, a research capability needs to be developed to provide basic research and analysis to feed into other elements of the awareness and marketing components of the strategy.

Task 2 – Building a national brand: Prior to promotion of the sector, both nationally and internationally, the core elements of a Trinidad and Tobago Education Export Brand needs to be defined and elaborated. This will become the focal point of promotion of the sector, delivering constant, consistent key messages of the brand, including image, strengths, niche markets and USP. Whilst this brand would not be static, it should evolve slowly rather than having dramatic changes and so the initial branding is a key element of the strategy.

Task 3 – Development of national awareness campaign: A national awareness campaign for the sector should be developed and revised periodically. The content will depend upon the resources available but would stress key statistics, benefits (actual and potential) of the sector to the economy and encourage political and policy prioritisation and attention.

Task 4 – National awareness events: Activities based on the campaign must be implemented and managed. The actual activities will depend both on the campaign design and available resources but could include advertising, editorials, press conferences, awards, sponsorships, newsletters and social media.

Task 5 – International branding campaign: key to long term success is international awareness, branding and reputation as a country and so implementation of the branding campaign will be important in establishing and maintaining it. Key messages such as quality of education, cost, security and opportunities nationally will need to be conveyed to a broad based audience. Again, the actual activities will depend both on the campaign design and available resources but could include advertising, editorials, press conferences, participation in international conferences, testimonials and social media.

Lobby Government for Support and Legislative Changes

AIMS

- To create a policy, legislative and regulatory environment that supports and encourages the export of education services
- To provide adequate government support in the building of necessary infrastructure, marketing promotion and incentives

OUTPUTS

1. Changes or creation of policy, legislation and regulations
2. Budgetary commitment and allocation to export development of the sector



3. Government investment and building of necessary infrastructure

ACTIONS

Task 1 – Review of legislation and regulations: There is a need to constantly review the prevailing policies, legislation and regulations to ensure consistency and alignment with the needs to promote the sector. For example, in the short term, ensure the planned education city compliments and adds to the national education export brand and provides facilities for all the sector.

Task 2 - Analysis of the needs of the sector: Examination of the needs of the sector including infrastructure (accommodation, transport, ICT, education buildings), incentives (fiscal, subsidies, education park etc) and funds for promotion and marketing.

Task 3 – Communications: articulate needs to government providing impact on the economy to justify changes in legislation and/or support. This should be based as much as possible on a working relationship between the private sector and government and could include establishment of a committee to work on these issues on an on-going basis.

Improving Sector Competitiveness

AIMS

- To improve the competitiveness of the education export sector

OUTPUTS

1. Provision of information and assistance with national and international accreditation
2. Development of voluntary national standards of education and accommodation
3. Development of facilities within the proposed education city such as an education park
4. Business and marketing training.

ACTIONS

Task 1 – Development of national accreditation for education in the private sector: These schemes would include higher education, ELT and TVE and would assure quality of education services (a grading system could be used for improvement in standards so that if all institutions were assessed and some performed badly, they could improve – the aim is to be inclusive as possible allowing for all ends of the market) so as to assist in the international promotion of the sector.

Task 2 – Development of standards for education and non-education facilities: Such schemes could cover standards for education facilities (buildings, classrooms, technical equipment etc) as well as non-educational facilities and services (accommodation, transport, pastoral care, student services, dealing with arrivals etc). These standards would be voluntary so as not to restrict business, but should be encouraged to be adopted to ensure “quality” of the national product.

Task 3: Promotion of quality standards and accreditation (international, regional and national): A programme of training and technical assistance in accreditation and adoption of standards would be undertaken annually based on available resources. This would include



promotion and provision of information as well as training and technical assistance. It would also not only include national standards and accreditation as developed in tasks 1 and 2 above, but also include international standards and accreditation, quality assurance (ISO), curricula building and improvements and other activities deemed necessary (training of education providers etc).

Task 4: Commercialisation of institutions for education exports: Education exports are businesses and although having a quality product is an important element of international competitiveness, many public and private institutions are not very commercial in their operations and activities. Therefore support and training in business, export marketing and management will be required to assist these institutions adapt and prepare for export development.

Task 5: Development of facilities: In order to provide high quality facilities, the government could build (wholly financed or PPP) required facilities including an education park for learning establishments (long term leased at subsidised rates or rental by the class) and high quality student accommodation. This could be included with the education city concept with local transport built in running between common student accommodation and their individual public and private education institutions. This is directly linked to task 2 of Lobby Government for Support and Legislative Changes activities, above

Task 6: Facilities Upgrading scheme: A review and inspection of private sector facilities (educational and non-educational) for each institutional would be systematically undertaken with a view to drawing up individual upgrade plans. If government support and resources are available, a grant scheme for improvements could be made available to ensure rising standards and a good image of the sector internationally.



Strategic Goal 2: Promotion of Higher Education

Specific targets

Sub-Saharan Africa has the highest outbound tertiary student mobility ratio (5.9%), which is almost three times greater than the global average. Students studying abroad from Africa in 2008, totalled 223,000, which equates to 8% of the global total. In addition, one out of 16 students from Africa studies abroad. Nigeria has the largest number of students studying abroad with 26,000 per year followed by Zimbabwe, Cameroon and Kenya:



Table 4: African Students Studying abroad (2008)

| | Number studying abroad |
|--------------|------------------------|
| Nigeria | 26,000 |
| Zimbabwe | 23,000 |
| Cameroon | 18,000 |
| Kenya | 13,000 |
| Senegal | 12,000 |
| Namibia | 8,000 |
| Other | 123,000 |
| Total | 223,000 |

TRENDS IN TERTIARY EDUCATION: SUB-SAHARAN AFRICA, UNESCO Institute for Statistics (UIS) 2010

The specific objective of Strategic Goal 2: Promotion of Higher Education, should be to increase the number of foreign tertiary education students studying in Trinidad Tobago by 2,500 per year – sourced from Nigeria (1,000), Zimbabwe (800), Cameroon (500) and Kenya (200) after 3 years

This target would represent capturing less than 5 per cent of each market. On this basis, 2,500 additional foreign students would contribute US\$ 15,000 each to the economy each year totalling US\$ 37.5 million.

In order to achieve this target, a number of Activities are proposed:

- ➔ *Conduct Student Recruitment Fairs in Target Markets*
- ➔ *Appointment of Education Consultants in Selected Markets*
- ➔ *Participate in International Recruitment Fairs*
- ➔ *Advertising and Awareness in Target Markets*



Conduct Student Recruitment Fairs in Target Markets

AIMS

- To actively promote Trinidad and Tobago and recruit higher education students
- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's higher education capabilities

OUTPUTS

1. Undertake recruitment events in Nigeria, Zimbabwe, Kenya, Cameroon
2. At least 800 students recruited from recruitment events

ACTIONS

Task 1 – Selection of venues in the target markets: This will involve the cities to be visited, size of venue and target audience and would typically be a hotel conference room with a number of stands or tables for each university or institution.

Task 2 – Selection of participants: Participants in the recruitment fairs will be based on capabilities and assumed demand locally (the most popular courses undertaken by African students travelling are business studies, IT and medicine). Training and support will be given to participating institutions including marketing materials (brochures, pens, plastic bags etc) together with stand design and interest forms and registration forms for use at the fair and follow up. Costs and financing of participation will depend upon available resources.

Task 3 – Event Planning and Preparation: This would involve logistics, budget and financing, and effective follow up systems. This phase would be expected to take at least 6 months to be effective.

Task 4 - Event Promotion: A comprehensive advertising campaign including banners around the city, newspaper and radio advertising and direct mail to prominent high schools and sixth forms (or equivalent) to generate interest in the fair.

Task 5 – Follow up: The majority of students visiting the fair will not sign up on the day, and so need effective follow up after the fair to convert interest into students. Where a student does not convert, it is important to ascertain why, to learn lessons for future sales and advertising.

Appointment of Education Consultants in Selected Markets

AIMS

- To have permanent representation in target markets marketing and promoting higher education schools in Trinidad and Tobago
- These agents to actively promote Trinidad and Tobago and recruit higher education students
- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's higher education capabilities

OUTPUTS

1. Education agents appointed in all target markets



2. Agents recruit at least 1,500 higher education students

ACTIONS

Task 1 - Identification of potential agents in target markets: This will involve internet research to list higher education agents in each target market. A set of criteria for reducing the list to a manageable number is needed (such as student testimonials, specialisms in specific courses offered by Trinidad and Tobago etc).

Task 2 – Mission to agents in Target markets: Initially, trips to visit potential agents will be needed during the vetting process to decide on which agents to appoint for Trinidad and Tobago higher education institutions through the Joint Marketing organisation. Once these have been selected, annual visits to these (and alternatives to ensure always the best ones are used) will need to be undertaken.

Task 3 – Agents Workshops: Once agents have been appointed, most schools and organisations invite all their agents to an event in country (all expenses paid) to view the facilities and schools and better understand course outlines. Therefore, the joint marketing organisation would organise this on behalf of all the schools.

Participate in International Recruitment Fairs

AIMS

- To actively promote Trinidad and Tobago and recruit higher education students
- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's higher education capabilities

OUTPUTS

1. Participation in recruitment fairs in Target markets (if appropriate)
2. At least 200 students recruited from fairs

ACTIONS

Task 1 - Identify appropriate Language recruit fairs in target markets: This will involve internet research to list higher education recruitment fairs in target markets, if any (for example, the International Education Fair Kenya).

Task 2 - Planning and preparation for Participation: This would involve logistics, stand design, participation, budget and financing, training of participants and effective follow up systems. This phase would be expected to take at least 6 months to be effective.

Task 3 – Participation in selected Fairs: Ideally institutions themselves would participate, but also information on accommodation (with families and separate); immigration (ideally visa's could be pre approved at the fair by an officer) and testimonials (past students could be used as advocates to talk to potential students).

Task 4 – Follow up: The majority of students visiting stands at exhibitions will not sign up on the day, and so need effective follow up after the fair to convert interest into students. Where a student does not convert, it is important to ascertain why, to learn lessons for future sales and advertising.



Advertising and Awareness in Target Markets

AIMS

- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's higher education capabilities

OUTPUTS

1. Advertising for higher education undertaken in all target markets

ACTIONS

Task 1 – Development of an annual publicity plan: Each year, an annual publicity plan should be drawn up. Trinidad and Tobago's publicity strategy should include advertising on the internet (sites to be identified such as studyabroad.com), brochures and videos, student magazines and Fair catalogues (such as the East Africa International University Fair Catalogue) in the target markets. Part of the plan would be identification of appropriate media in each target market based on research.

Task 2 – Development of publicity materials: Once the publicity plan is in place and selected media identified, appropriate materials will need to be designed and produced. This would include print advertisements with key messages, videos, student testimonials brochures and editorials.

Task 3 – Implementation and enquiry processing: It is vital that during the implementation of the publicity campaign, adequate communication resources are available to process incoming enquiries – taking them and passing them onto appropriate schools in Trinidad and Tobago and also, with effective follow up to ensure queries are addressed and enquiries answered.

Task 4 – Student testimonials: the most effective advertising tool for any country is student testimonials. There is therefore a need to collect testimonials in all forms of media (written and video) as well as systematic surveys of all students from abroad to enable headline claims eg "99% of students would recommend Trinidad and Tobago." These testimonials will form part of future advertising and publicity.



Strategic Goal 3: Promotion of English Language Training

Specific targets

Given its proximity to Latin America, Trinidad and Tobago should focus its ELT strategy on recruiting ELT students from large nearby markets (Brazil being the largest ELT travel market (estimated 3 million) in Latin America but also Columbia, Costa Rica and Venezuela which have large ELT students travelling to UK annually). Brazil's current destinations include South Africa, Ireland, Australia, New Zealand, and Canada.



In addition, Trinidad and Tobago should also start to develop the world's largest market China (22 million) for ELT whose main destinations are UK, USA and Australia.

Therefore, the specific objective for English Language Training should be:

The specific target for Strategic Goal 3: Promotion of English Language Training will be to recruit 2,500 new ELT students per year - 1,500 from Brazil, 500 from China and 500 from other Latin countries (such as Costa Rica, Argentina and Chile) after 3 years.

Based on recruiting 2,500 students additionally after 3 years, approximately US\$ 9 million extra in course fees to English Language schools plus US\$ 3.5 million living expenses spent locally in the economy. In order to recruit these students, Trinidad and Tobago's strategy will be based on ELT marketing channels of Agents (which account for on average 60% of student ELT recruitment in UK, Canada, Australia, Ireland and South Africa); Advertising (which account for 11% of ELT recruitment) and recruitment fairs (which account for 13% of ELT recruitment). It should be noted that in the UK, schools spend on average 7% of income on marketing so pro rate, this would equate to US\$ 875,000 for the specific target.

- ➔ Appointment of agent in selected markets
- ➔ Advertising in target markets
- ➔ Participation in Recruitment Fairs in Target Market

Appointment of Agent in Selected Markets

AIMS

- To have permanent representation in target markets marketing and promoting ELT schools in Trinidad and Tobago
- These agents to actively promote Trinidad and Tobago and recruit ELT students
- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's ELT capabilities



OUTPUTS

1. ELT agents appointed in all target markets
2. Agents recruit at least 1,500 ELT students

ACTIONS

Task 1 - Identification of potential agents in target markets: This will involve internet research to list ELT agents in each target market (for example, one international directory alone registers more than 30 in Brazil). A set of criteria for reducing the list to a manageable number is needed (such as student testimonials, specialisms in ELT etc). Such research would include (but not restricted to) ELT Schools and Agents Directory and Federation of Education and Language Consulting. Cost will be another factor but it should be noted that on average, agents charge 20% of ELT fees for recruitment.

Task 2 – Mission to agents in Target markets: Initially, trips to visit potential agents will be needed during the vetting process to decide on which agents to appoint for Trinidad and Tobago ELT schools through the Joint Marketing organisation. Once these have been selected, annual visits to these (and alternatives to ensure always the best ones are used) will need to be undertaken. It should be noted that UK schools spend on average 27% of their total marketing budget on visits to agents.

Task 3 – Agents Workshops: Once agents have been appointed, most schools and organisations invite all their agents to an event in country (all expenses paid) to view the facilities and schools and better understand course outlines. Therefore, the joint marketing organisation would organise this on behalf of all the schools.

Advertising in Target Markets**AIMS**

- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's ELT capabilities
- Recruitment of ELT students

OUTPUTS

1. Advertising for ELT undertaken in all target markets
2. At least 300 ELT students recruited through advertising

ACTIONS

Task 1 – Development of an annual publicity plan: Each year, an annual publicity plan should be drawn up. In the UK, less than 20% of students are recruited by publicity (including internet) although publicity represents on average, more than 30% of marketing budgets. This is because publicity is not only used for recruitment but also for general awareness. Trinidad and Tobago's publicity strategy should include advertising on the internet, brochures and videos, student magazines and agent magazines in the target markets. Part of the plan would be identification of appropriate media in each target market based on research.



Task 2 – Development of publicity materials: Once the publicity plan is in place and selected media identified, appropriate materials will need to be designed and produced. This would include print advertisements with key messages, videos, student testimonials brochures and editorials.

Task 3 – Implementation and enquiry processing: It is vital that during the implementation of the publicity campaign, adequate communicate resources are available to process incoming enquiries – taking them and passing them onto appropriate schools in Trinidad and Tobago and also, with effective follow up to ensure queries are addressed and enquires answered.

Task 4 – Student testimonials: the most effective advertising tool for any country is student testimonials. There is therefore a need to collect testimonials in all forms of media (written and video) as well as systematic surveys of all ELT students from abroad to enable headline claims eg “99% of students would recommend ELT in Trinidad and Tobago.” These testimonials will form part of future advertising and publicity

Participation in Recruitment Fairs in Target Markets

AIMS

- To promote Trinidad and Tobago and recruit ELT students
- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's ELT capabilities

OUTPUTS

1. Participation in recruitment fairs in Brazil and China
2. At least 700 students recruited from fairs

ACTIONS

Task 1 - Identify appropriate Language recruit fairs in Brazil and China: This will involve internet research to list ELT recruitment fairs in Brazil and China (for example, the International Education Brazil EXPO Roadshow tours 6 cities, costs around US\$20,000 for participation and in 2010, attracted 13,000 students). A set of criteria for reducing the list to a manageable number is needed (such as student numbers, coverage, cost, specialisms in ELT, reviews etc).

Task 2 - Planning and preparation for Participation: This would involve logistics, stand design, participation, budget and financing, training of participants and effective follow up systems. This phase would be expected to take at least 6 months to be effective.

Task 3 – Participation in selected Fairs: Ideally schools themselves would participate, but also information on accommodation (with families and separate); immigration (ideally visa's could be pre approved at the fair by an officer) and testimonials (past students could be used as advocates to talk to potential students – and use as interpreters as necessary).

Task 4 – Follow up: The majority of students visiting stands at exhibitions will not sign up on the day, and so need effective follow up after the fair to convert interest into students. Where a student does not convert, it is important to ascertain why to learn lessons for future sales and advertising.



Strategic Goal 4: Promotion of Technical and Vocational Education

Specific Targets

The key to selling technical and vocational education successfully is to link the training (and qualifications) with the needs of the market being targeted. There is a recognised deficit in adequate TVE within the Caribbean and CARICOM and the Caribbean Association of National Training Agencies (CANTA) have been looking at strategies to address this, partly through consolidation of skills in national training agencies.

This means that in many countries, they will not have the training and courses nationally to meet their needs. Therefore, Trinidad and Tobago should focus on markets it knows (or can easily find out about), that is, regional Caribbean markets and, sector specific markets where it has specialist expertise, such as the oil and gas sector.

Therefore, the specific objective for TVE should be:

The specific target for Strategic Goal 4: Promotion of Technical and Vocational Training will be to recruit 2,500 new TVE students per year - 1,500 from the Caribbean Region and 1,000 sector specific students after 3 years.



Based on recruiting an additional 2,500 TVE students per year after 3 years, approximately US\$ 12.5 million revenue in the economy will be derived.

In order to achieve this target, a number of Activities are proposed:

- ➔ Target firms/governments globally by specialism
- ➔ Advertising regionally
- ➔ Conduct Student recruit fairs regionally

Target firms/governments globally by specialism

AIMS

- To identify specific target markets for TVE
- To recruit TVE students

OUTPUTS

1. Organisation of 6 trade missions (3 regional, 3 international)
2. At least 1,000 students recruited from missions

ACTIONS

Task 1 – Assessing regional TVET needs in the Caribbean: Working with the regional association, CANTA, national governments in the Caribbean and internet research, assess the



needs of specific countries that cannot be met (or adequately met) by their national training facilities and match these with training offered within Trinidad and Tobago.

Task 2 - Assess global needs for specialist TVE: Undertake research to identify countries around the world where TVET skills in specific specialism are absent, but where there is a discernable demand (For example West and East African countries where oil/gas is newly being extracted such as Ghana, Kenya, Uganda).

Task 3 – Trade Missions Preparation: Based on research, select countries that will be targeted during mission, identify appropriate training organisations in Trinidad and Tobago, training of participants, identify lead government officials/Ministries to lead the mission (for government to government discussions), organise and plan logistics, budgeting and financing, develop and arrange mission schedule.

Task 3 – Trade Missions: For identified countries and sectors, undertake trade mission to recruit students. This would include government-to-government negotiations (for government paid schemes such as governments paying for students to come to Trinidad and Tobago regionally or in specialised fields) as well as for local and international companies that need their staff trained.

Task 4 – Follow up: Following the mission, there will be a need for effective follow up to chase leads, firm up contracts, submit proposals and continue communications with government and other agencies (including local training agencies through which training might be undertaken).

Advertising Regionally

AIMS

- To increase awareness of TVE courses available in Trinidad and Tobago
- To increase the number of regional TVE students

OUTPUTS

1. Advertising for TVE undertaken in all target regional markets
2. At least 500 TVE students recruited through advertising

ACTIONS

Task 1 – Development of an annual publicity plan: Each year, an annual publicity plan should be drawn up. Part of the plan would be identification of appropriate media in each target market based on research but should include national media (TV, Radio, Newspapers) as core elements to research potential students in Target markets. Target markets will be selected based on the needs identified in Activity 1 above but are likely to the smaller Caribbean islands with limited TVE capacity.

Task 2 – Development of publicity materials: Once the publicity plan is in place and selected media identified, appropriate materials will need to be designed and produced. This would include print advertisements with key messages, videos, student testimonials, brochures and editorials.



Task 3 – Implementation and enquiry processing: It is vital that during the implementation of the publicity campaign, adequate communication resources are available to process incoming enquiries – taking them and passing them onto appropriate schools in Trinidad and Tobago and also, with effective follow up to ensure queries are addressed and enquiries answered.

Conduct Student Recruitment Fairs Regionally

AIMS

- To actively promote Trinidad and Tobago and recruit TVE students Regionally
- Increase awareness amongst stakeholders in target markets of Trinidad and Tobago's TVE capabilities

OUTPUTS

1. Undertake recruitment events in at least 5 regional countries
2. At least 1,000 students recruited from recruitment events

ACTIONS

Task 1 – Selection of venues in the target markets: The target markets will be identified by research in Activity 1 above. Following this, logistics for the planned events will be organised and target audience and would typically be a hotel conference room with a number of stands or tables for each TVE institution participating.

Task 2 – Selection of participants: Participants in the recruitment fairs will be based on capabilities and assumed demand locally (meeting the national needs). Training and other support will be given to participating institutions including marketing materials (brochures, pens, plastic bags etc) together with stand design and interest forms and registration forms for use at the fair and follow up. Costs and financing of participation will depend upon available resources.

Task 3 – Event Planning and Preparation: This would involve logistics, budget and financing, and effective follow up systems. This phase would be expected to take at least 6 months to be effective.

Task 4 - Event Promotion: A comprehensive advertising campaign including banners around the city, newspaper and radio advertising and direct mail to firms and colleges to generate interest in the fair.

Task 5 – Follow up: The majority of students visiting the fair will not sign up on the day, and so need effective follow up after the fair to convert interest into students. Where a student does not convert, it is important to ascertain why, to learn lessons for future sales and advertising.



Action plan

Supervision and M&E

This strategy will require cooperation and actions by a broad range of stakeholders within the public and private sectors. Therefore, there is a real need for a strong supervisory and facilitation role for an APEX organisation that can coordinate and oversee implementation.

This role should be taken on by the Trinidad and Tobago Coalition of Services Industries (TTCSI) who will not only act as the driver of the strategy, but take responsibility for Monitoring and evaluation. This will require first undertaking baseline studies of key indicators and publishing progress of the strategy (with appropriate media coverage to support the sector).

This is a crucial role and TTCSI will need to be given appropriate resources to monitor and facilitate implementation in the national interest, and will also need to develop appropriate skills for the task.

Institutional Arrangements

Implementation of this strategy will be undertaken by a broad range of stakeholders in both the public and private sectors. There are a number of options for implementation and lead agencies/organisations depending upon willingness, commitment and resources. During the initial discussion of this strategy amongst stakeholders, the exact modalities will be discussed and agreed, as well as completion of the Outline Action Plan (below).

Outline Action Plan

The following Action Plan provides an indicative schedule of activities to implement the strategy. However, the institutions involved in implementation should review and revise the action plan on an on-going basis to ensure its accuracy, relevance and reflect the changing dynamics of Trinidad and Tobago and the global market.

Stakeholders will first need to discuss and complete the Outline, assigning Lead Agencies, resources and budgets. Once these have been agreed, each component of the Action Plan must be elaborated into a individual workplan. The Outline Action Plan and individual Workplans will need to be revised periodically to take account of available resources, changing politics, commitment of the sector, international market dynamics and lessons from previous activities.



Outline Action Plan – To be Completed by Stakeholders

| | Outputs | Result Indicators | Lead Agency | Duration (start-finish months) | Internal Resources | Budget Allocation |
|--|---|--|-------------|--------------------------------|--------------------|-------------------|
| Overall objective | Increase the national income from foreign students by US\$62.5 million pa after 3 years | Increase in foreign students by 7,500 pa | TTCSI | Jan 2013 – Dec 2015 | | |
| Strategic Goal 1: Sector Wide Awareness and Promotion | | | | | | |
| Specific Target | To bring together education stakeholders in the public and private sector to establish a formal working body to drive forward the strategy and agenda of the sector | | | | | |
| Activity 1.1 Establish Joint Marketing and Representation Office | | | | | | |
| Task 1.1.1 Facilitate Sector Meetings | 1. Organisation is registered (whether it be a non-profit association, corporation with shareholders from public bodies and private associations or government agency) 2. Organisation is staffed, resourced and operating | | | | | |
| Task 1.1.2 Define Scope of Activities for Proposed Organisation | | | | | | |
| Task 1.1.3 Register organisation and staff and resource | | | | | | |
| Task 1.1.4 Develop systems for marketing | | | | | | |
| Activity 1.2 Awareness Raising and Destination Branding | | | | | | |
| Task 1.2.1 Basic research on sector | 1. National Awareness Campaign 2. International Branding Campaign 3. Awareness raising events such as advertisements in international press, media coverage, participation in international conferences, editorials | | | | | |
| Task 1.2.2 Building a national brand | | | | | | |
| Task 1.2.3 Development of national awareness campaign: | | | | | | |
| Task 1.2.4 National awareness events | | | | | | |
| Task 1.2.5 International branding campaign | | | | | | |
| Activity 1.3 Lobby Government for Support and Legislative Changes | | | | | | |
| Task 1.3.1 Review of legislation and regulations | 1. Changes or creation of policy, legislation and regulations 2. Budgetary commitment and allocation to export development of the sector 3. Government investment and building of necessary infrastructure | | | | | |
| Task 1.3.2 Analysis of the needs of the sector | | | | | | |
| Task 1.3.3 Communications | | | | | | |
| Activity 1.4 Improving Sector Competitiveness | | | | | | |
| Task 1.4.1 | 1. Provision of | | | | | |



| | Outputs | Result Indicators | Lead Agency | Duration (start-finish months) | Internal Resources | Budget Allocation |
|--|---|---|-------------|--------------------------------|--------------------|-------------------|
| Development of national accreditation for education in the private sector | information and assistance with national and international accreditation | | | | | |
| Task 1.4.2 Development of standards for education and non-education facilities | 2. Development of voluntary national standards of education and accommodation | | | | | |
| Task 1.4.3 Promotion of quality standards and accreditation (international, regional and national) | 3. Development of facilities within the proposed education city such as an education park | | | | | |
| Task 1.4.4 Commercialisation of institutions for education exports | 4. Business and marketing training. | | | | | |
| Task 1.4.5 Development of facilities | | | | | | |
| Task 1.4.6 Facilities Upgrading scheme | | | | | | |
| Strategic Goal 2: Promotion of Higher Education | | | | | | |
| Specific Target | US\$ 37.5 million | To increase the number of foreign tertiary education students studying in Trinidad Tobago by 2,500 per year– sourced from Nigeria (1,000), Zimbabwe (800), Cameroon (500) and Kenya (200) after 3 years | | | | |
| Activity 2.1 Conduct Student Recruitment Fairs in Target Markets | | | | | | |
| Task 2.1.1 Selection of venues in the target markets | 1. Undertake recruitment events in Nigeria, Zimbabwe, Kenya, Cameroon | | | | | |
| Task 2.1.2 Selection of participants | 2. At least 800 students recruited from recruitment events | | | | | |
| Task 2.1.3 Event Planning and Preparation | | | | | | |
| Task 2.1.4 - Event Promotion | | | | | | |
| Task 2.1.5 Follow up | | | | | | |
| Activity 2.2 Appointment of Education Consultants in Selected Markets | | | | | | |
| Task 2.2.1 Identification of potential agents in target markets | 1. Education agents appointed in all target markets | | | | | |
| Task 2.2.2 Mission to agents in Target markets | 2. Agents recruit at least 1,500 higher education students | | | | | |
| Task 2.2.3 Agents Workshops | | | | | | |
| Activity 2.3 Participate in International Recruitment Fairs | | | | | | |
| Task 2.3.1 Identify appropriate Language recruit | 1. Participation in recruitment fairs in Target markets (if | | | | | |



| | Outputs | Result Indicators | Lead Agency | Duration (start-finish months) | Internal Resources | Budget Allocation |
|---|--|---|-------------|--------------------------------|--------------------|-------------------|
| fairs in target markets | appropriate) 2. At least 200 students recruited from fairs | | | | | |
| Task 2.3.2 Planning and preparation for Participation | | | | | | |
| Task 2.3.3 Participation in selected Fairs | | | | | | |
| Task 2.3.4 Follow up | | | | | | |
| Activity 2.4 Advertising and Awareness in Target Markets | | | | | | |
| Task 2.4.1 Development of an annual publicity plan | 1. Advertising for higher education undertaken in all target markets | | | | | |
| Task 2.4.2 Development of publicity materials | | | | | | |
| Task 2.4.3 Implementation and enquiry processing | | | | | | |
| Task 2.4.4 Student testimonials | | | | | | |
| Strategic Goal 3: Promotion of English Language Training | | | | | | |
| Specific Target | US\$ 12.5 m | To recruit 2,500 new ELT students per year - 1,500 from Brazil, 500 from China and 500 from other Latin countries (such as Costa Rica, Argentina and Chile) after 3 years | | | | |
| Activity 3.1 Appointment of Agent in Selected Markets | | | | | | |
| Task 3.1.1 Identification of potential agents in target markets | 1. ELT agents appointed in all target markets | | | | | |
| Task 3.1.2 Mission to agents in Target markets | 2. Agents recruit at least 1,500 ELT students | | | | | |
| Task 3.1.3 Agents Workshops | | | | | | |
| Activity 3.2 Advertising in Target Markets | | | | | | |
| Task 3.2.1 Development of an annual publicity plan | 1. Advertising for ELT undertaken in all target markets | | | | | |
| Task 3.2.2 Development of publicity materials: | 2. At least 300 ELT students recruited through advertising | | | | | |
| Task 3.2.3 Implementation and enquiry processing | | | | | | |
| Task 3.2.4 Student testimonials | | | | | | |
| Activity 3.3 Participation in Recruitment Fairs in Target Markets | | | | | | |
| Task 3.3.1 Identify appropriate Language recruit fairs in Brazil and China: | 1. Participation in recruitment fairs in Brazil and China 2. At least 700 students recruited from fairs | | | | | |
| Task 3.3.2 Planning and | | | | | | |



| | Outputs | Result Indicators | Lead Agency | Duration (start-finish months) | Internal Resources | Budget Allocation |
|--|--|---|-------------|--------------------------------|--------------------|-------------------|
| preparation for Fairs | | | | | | |
| Task 3.3.3 Participation in selected Fairs | | | | | | |
| Task 3.3.4 Follow up | | | | | | |
| Strategic Goal 4: Promotion of Technical and Vocational Education | | | | | | |
| Specific Target | US\$ 12.5 million | To recruit 2,500 new TVE students per year - 1,500 from the Caribbean Region and 1,000 sector specific students after 3 years | | | | |
| Activity 4.1 Target firms/governments globally by specialism | | | | | | |
| Task 4.1.1 Assessing regional TVET needs in the Caribbean | 1. Organisation of 6 trade missions (3 regional, 3 international) 2. At least 1,000 students recruited from missions | | | | | |
| Task 4.1.2 Assess global needs for specialist TVE | | | | | | |
| Task 4.1.3 Trade Missions Preparation | | | | | | |
| Task 4.1.4 Follow up | | | | | | |
| Activity 4.2 Advertising Regionally | | | | | | |
| Task 4.2.1 Development of an annual publicity plan | 1. Advertising for TVE undertaken in all target regional markets 2. At least 500 TVE students recruited through advertising | | | | | |
| Task 4.2.2 Development of publicity materials | | | | | | |
| Task 4.2.3 Implementation and enquiry processing | | | | | | |
| Activity 4.3 Conduct Student Recruitment Fairs Regionally | | | | | | |
| Task 4.3.1 Selection of venues in the target markets | 1. Undertake recruitment events in at least 5 regional countries 2. At least 1,000 students recruited from recruitment events | | | | | |
| Task 4.3.2 Selection of participants: | | | | | | |
| Task 4.3.3 Event Planning and Preparation | | | | | | |
| Task 4.3.4 Event Promotion | | | | | | |
| Task 4.3.5 Follow up | | | | | | |

