

English at Work: global analysis of language skills in the workplace

Full report
November 2016



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1 Introduction

English is spoken at some level by 1.75 billion people worldwide – roughly a quarter of the world’s population.¹ The vast majority of people who use English are non-native speakers (over 1 billion people).

Wherever you are in the world, English is the language of international business, science and research. Over 80% of academic journals² are written entirely in English.³ An estimated 85% of international organisations use English as one of their working languages.⁴

However, despite the ever-increasing prevalence of English in the workplace, there has been relatively little *in-depth* research into the English language skills required by employers in different industries and countries around the world. What level of English do employers need? Are there English language skills gaps? Do employees with a higher level of English receive enhanced benefits? How do different countries and industries compare?

Cambridge English and QS have worked together to answer these questions and more. In this report, we present a global, cross-industry overview of English language skills in the workplace.

Cambridge English is the global leader in English language assessment. We offer a wide range of English language exams, including business English tests. Our exams are accepted by over 20,000 organisations worldwide as proof of English language ability.



English is the real global language and is important in education, relations and business. I am the Chairman of one of the largest Italian Bank Foundations and we are dealing with more than 100 countries. Our work language is English.’

Professor Francesco Profumo, Politecnico di Torino, Italy

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1 Harvard Business Review (2012) *Global Business Speaks English*, available online: <https://hbr.org/2012/05/global-business-speaks-english>

2 Journals in SCOPUS (the world’s largest database of peer-reviewed journals): <https://www.scopus.com>

3 van Weijen, D (2012) The Language of (Future) Scientific Communication, *Research Trends* 31, available online: www.researchtrends.com/issue-31-november-2012/the-language-of-future-scientific-communication

4 British Council (2000) *The Future of English?*, available online: www.britishcouncil.jp/sites/default/files/eng-future-of-english-en.pdf

2 Methodology

The findings in this report are based on data from the annual QS Global Employer Survey and insights from industry experts.

QS Global Employer Survey

The QS Global Employer Survey has been running since 1990. Its main aim is to find out employers' opinions on the quality of university graduates. In 2016, QS and Cambridge English introduced a series of questions about English language skills in the workplace.⁵

The survey was live between 1 April and 31 July 2016. The questions about English language skills were answered by 5,373 employers, in 38 countries/territories and 20 different industries.⁶

Industry experts

Throughout this report, the survey findings are supported by qualitative industry insights. These insights were provided by:

- Cambridge English experts⁷
- a sample of employers who took part in the QS Global Employer Survey.

⁵ The series of survey questions about English language skills is provided in Appendix 1.

⁶ Further survey methodology details, such as sampling and filtering procedures, are provided in Appendix 2.

⁷ Details about the interviewed employers, Cambridge English experts and report contributors are provided in the Acknowledgements (page 40).

3 Survey participants

Participants by country and territory

This report presents a country-by-country comparison of English language skills in the workplace. Countries and territories with survey responses from at least 20 employers have been included in this analysis.

Countries and territories have been categorised into:

- countries and territories where English is not an official language
- countries and territories where English is an official or *de facto* official language
- English-speaking countries, where English is the first language of the majority of the population.

Table 1: Countries/territories included in this report (survey responses received from at least 20 employers)

Countries/territories where English is not an official language	Survey responses	Countries/territories where English is an official or <i>de facto</i> official language	Survey responses	English-speaking countries	Survey responses
China	1,643	Malaysia	126	United States	174
Russia	470	India	72	United Kingdom	151
South Korea	381	Singapore	53	Australia	123
Brazil	279	Hong Kong	32	Canada	92
Kazakhstan	200			Ireland	43
Japan	160			New Zealand	38
France	144				
Mexico	132				
Italy	98				
Venezuela	71				
Germany	59				
Chile	54				
Indonesia	46				
Portugal	44				
Argentina	39				
Lithuania	36				
Spain	36				
Ukraine	34				
Taiwan	33				
Peru	31				
Egypt	27				
Switzerland	25				
Iraq	24				
Jordan	23				
Belgium	22				
Denmark	20				
Saudi Arabia	20				
Colombia	20				

BRIC (Brazil, Russia, India, China)

The survey received a high proportion of responses from BRIC countries (three of the top four countries). The highest number of responses was from employers in China (1,643 responses), the second highest was from employers in Russia (470 responses), while Brazil was ranked fourth (279 responses).

Using the World Bank's classification of countries⁸, we can see that the majority of survey responses have been provided by employers from high and middle income countries and territories:

- 36% of responses are from employers in high income countries and territories
- 63% of responses are from employers in middle income countries and territories
- 0.1% of responses are from employers in low income countries and territories.*

* Not classified: 0.9%.

Regional participation

The survey received responses from employers all around the world, with the largest number of responses coming from East Asian countries and territories.

Table 2: Percentage of survey responses from each region⁹

Region	% of survey responses ¹⁰
East Asia and Pacific	50%
Europe and Central Asia	28%
Latin America and the Caribbean	12%
North America	5%
Middle East and North Africa	3%
South Asia	2%
Sub-Saharan Africa	1%

⁸ World Bank Country Groups: <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups>

⁹ World Bank Country Groups: <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups>

¹⁰ Throughout this report figures are displayed to zero decimal points. Consequently the sums of some rows and columns are 99% or 101% rather than 100%.

Participants by industry

This report also presents an industry-by-industry comparison of English language skills in the workplace. As before, industries with survey responses from at least 20 employers have been included in this analysis.

Table 3: Industries included in this report (survey responses received from at least 20 employers)

Industries*	Survey responses	% of responses from countries/territories where English is not an official language	% of responses from English-speaking countries and countries/territories where English is an official or <i>de facto</i> official language
Consulting / Professional Services	729	80%	20%
IT / Computer Services	528	83%	17%
Manufacturing / Engineering	483	77%	23%
Construction / Property	369	91%	9%
Financial Services / Banking	342	74%	26%
Pharmaceuticals / Biotech & Healthcare	300	77%	23%
Recruitment / HR Services	289	90%	10%
Public Sector / Government / Not-for-profit	286	77%	23%
Energy	192	79%	21%
Electronics / High Technology	155	78%	22%
Transportation / Distribution	143	92%	8%
Travel / Leisure / Hospitality	137	83%	17%
FMCG (Fast Moving Consumer Goods)	125	92%	8%
Media / Entertainment & Arts	122	70%	30%
Retail	106	82%	18%
Law	92	71%	29%
Telecoms	83	77%	23%
Metals / Mining	60	87%	13%
Aerospace / Defence	50	70%	30%
Utilities	31	90%	10%

* Other industries: 751 responses (countries/territories where English is not an official language: 94%; English-speaking countries and countries/territories where English is an official or *de facto* official language: 6%).

Participants by organisation size

Survey participants were also asked to provide information about their organisation's size. The largest number of responses was from small businesses (10–99 employees) and large enterprises (more than 2,500 employees).

Table 4: Survey responses by organisation size

Organisation size* (number of employees)	Survey responses	% of responses from countries/ territories where English is not an official language	% of responses from English-speaking countries and countries/territories where English is an official or <i>de facto</i> official language
Micro business (1–9 employees)	800	84%	17% ¹¹
Small business (10–99 employees)	1,320	80%	20%
Medium-sized business (100–499 employees)	879	81%	19%
Mid-large-sized business (500–999 employees)	566	88%	12%
Enterprise business (1,000–2,499 employees)	528	88%	12%
Large enterprise (More than 2,500 employees)	1,261	81%	19%

* No size given: 18 responses (countries/territories where English is not an official language: 94%; English-speaking countries and countries/territories where English is an official or *de facto* official language: 6%).

All organisation sizes received a similar proportion of responses from employers located in countries/territories where English is not an official language (80–88%) and employers located in English-speaking countries and countries/territories where English is an official or *de facto* official language (12–20%).

The highest proportion of responses from employers located in countries/territories where English is not an official language came from mid-large-sized businesses (500–999 employees) and enterprise businesses (1,000–2,499 employees).

¹¹ Throughout this report figures are displayed to zero decimal points. Consequently the sums of some rows and columns are 99% or 101% rather than 100%.

4 Findings

4.1 How important are English language skills?

Key findings

English is immensely important wherever you are in the world. In countries and territories where English is not a native or official language, over two thirds of employers say that English is important for their business.

English is the language of international business, so increasingly it is just as important for businesses in native and non-native English-speaking countries. The survey shows that English language skills are important for over 95% of employers in many countries and territories where English is not an official language.

Findings by language status

In countries and territories where English is not an official language, 69% of employers said that English is significant¹² for their organisation. In countries and territories where English is an official or *de facto* official language, this increased to 97% of all employers.

Overall, English is important to the majority of employers in countries and territories where English is not an official language, but they were less likely to say that it is extremely important or the main language used.

Responses included in the analysis

Please note that the findings in following sections 4.2, 4.3, 4.4, 4.5 and 4.6 are based on the responses received from the employers who said that English is significant to their organisation.

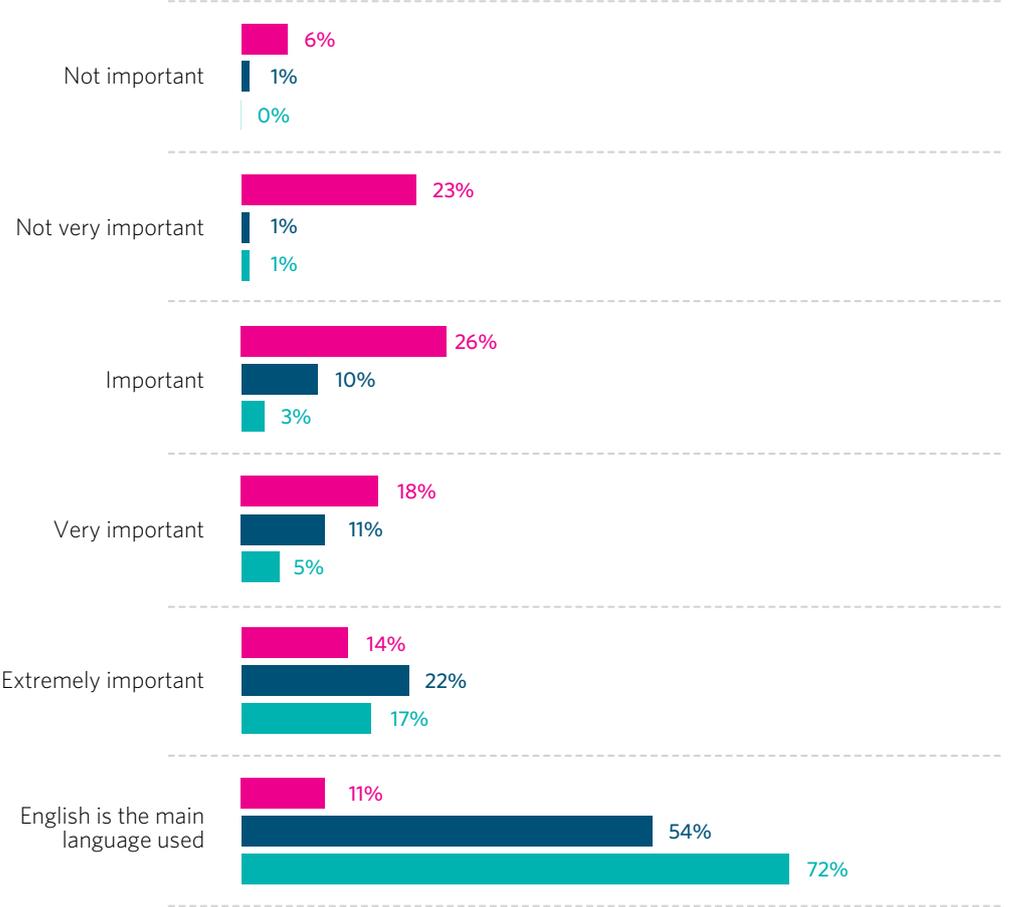


We serve predominantly foreign clients with different languages and cultures. It is essential for us to communicate effectively and clearly. English is the common denominator.'

Pratik A Narsingpura, Business Advisory, SKP Business Consulting LLP, India

¹² 'Significant' includes the following responses: 'English is the main language used', 'Extremely important', 'Very important', 'Important'.

Graph 1: % of employers that said English is important - language status comparison*



* The remaining respondents answered 'Don't know' or 'Not applicable'.

- Countries/territories where English is not an official language
- Countries/territories where English is an official or *de facto* official language
- English-speaking countries

Findings by country and territory

English is important for over 95% of employers in many countries and territories where English is not an official language, such as Belgium, Germany, Italy, Portugal and Switzerland.

The countries and territories least likely to say that English is important were:

- **Latin American countries:** Brazil, Chile and Venezuela are among the five countries and territories least likely to say that English is important. In addition, Colombia, Argentina and Mexico all feature towards the low end of the list.
- **BRIC countries:** Brazil, Russia and China are all among the five countries and territories least likely to say that English is important.

Although these countries and territories feature towards the low end of the list, at least 50% of all employers (apart from in Chile) still say that English is important for their organisation.

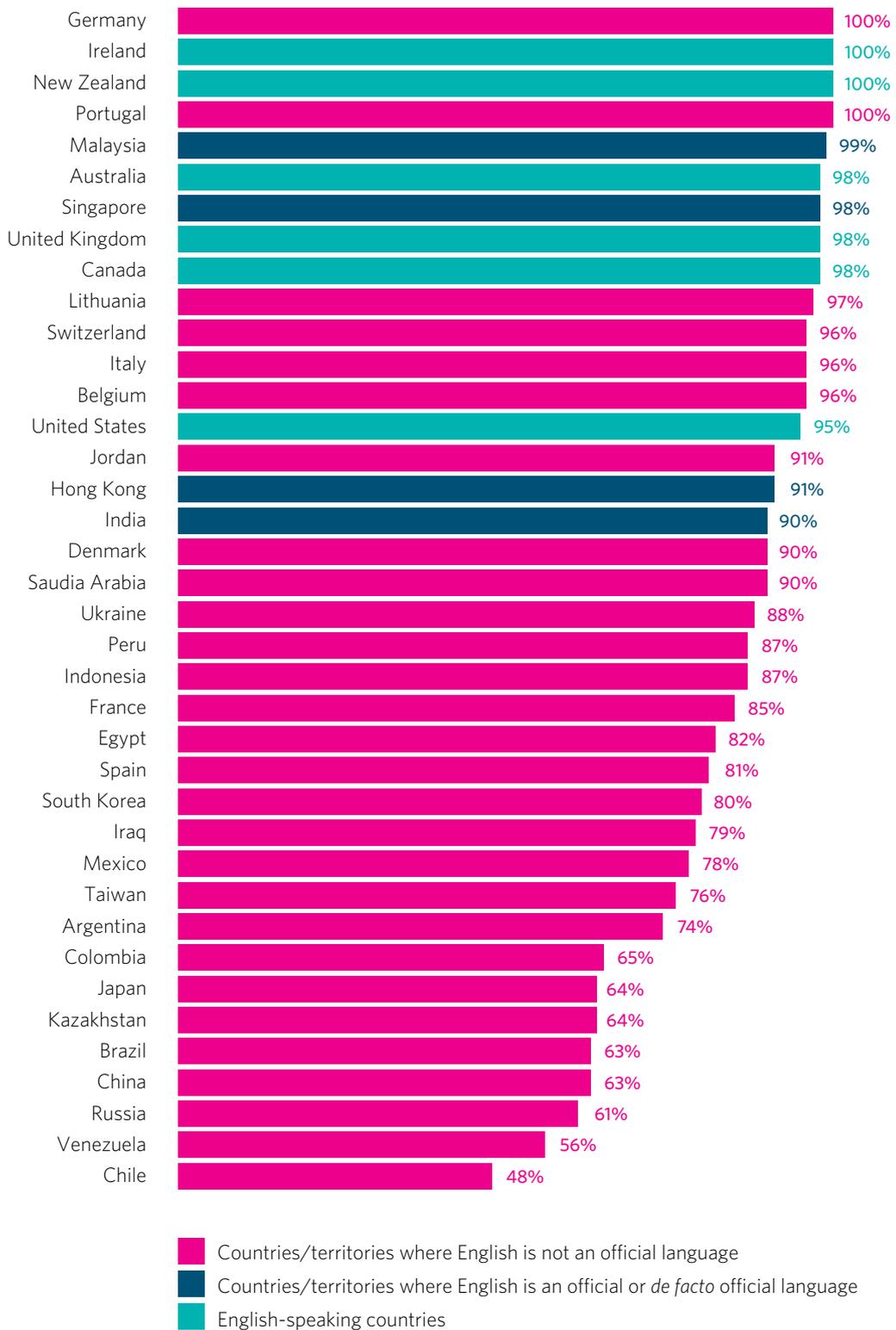
Country case study: India

India is different from the other BRIC countries. Over 85% of employers say that English language skills are important for their organisation. This result may reflect India's historical connections to English-speaking countries.

Today, English is an official language in India. However, it is not always widely spoken throughout the country – it can be a first, second or foreign language. Teaching English to primary school children has been a controversial matter, both politically and pedagogically.

However, among parents there is a strong demand for English, and the early years of schooling aim to develop proficiency in English as a base for later academic or professional language use.

Graph 2: % of employers that said English is significant¹³ for their organisation - country/territory comparison



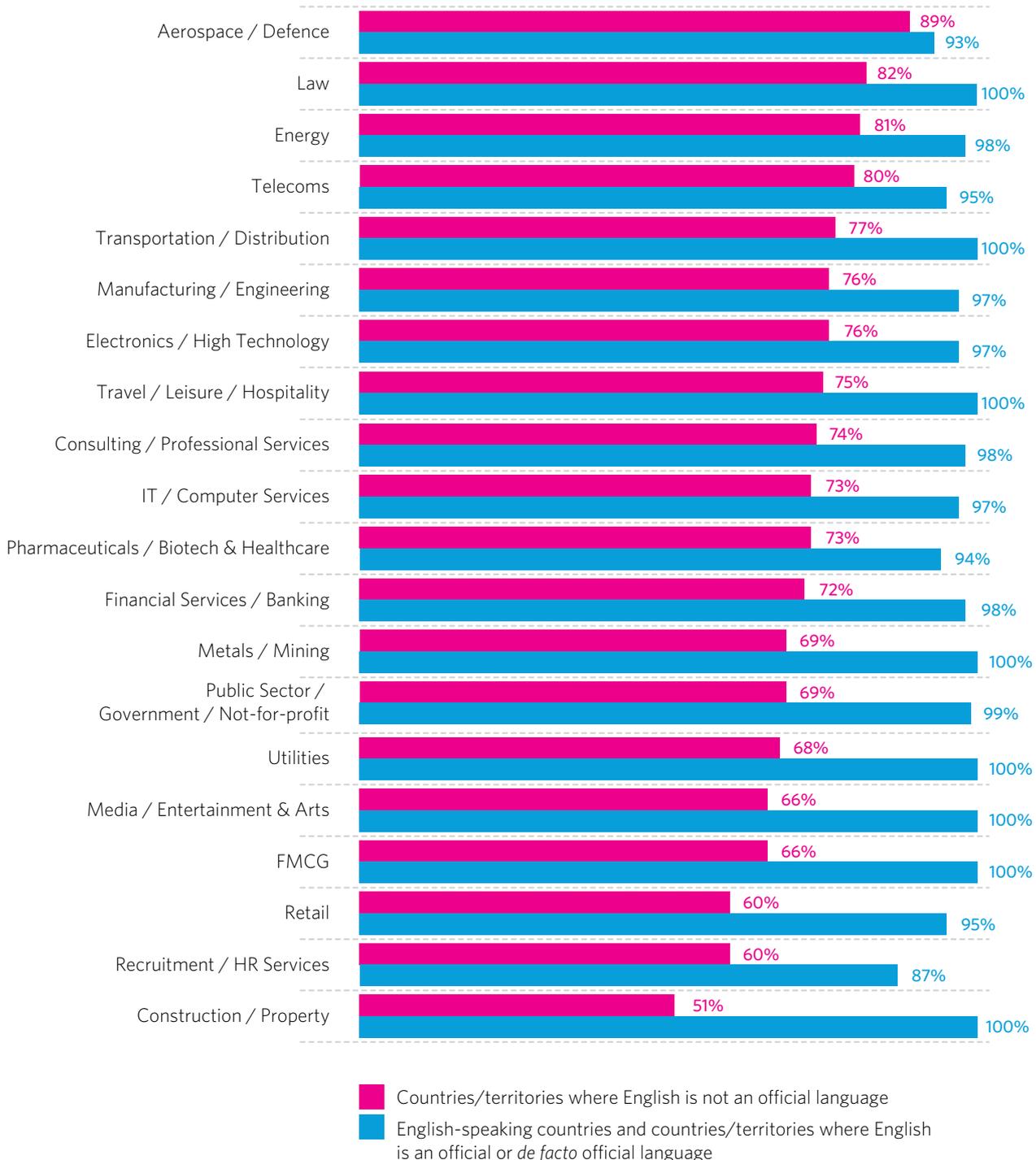
¹³ 'Significant' includes the following responses: 'English is the main language used', 'Extremely important', 'Very important', 'Important'.

Findings by industry

In countries and territories where English is not an official language, the industries least likely to say that English is important (with less than two thirds of employers saying that English is significant for their organisation) were:

- Construction and Property
- Recruitment and HR Services
- Retail.

Graph 3: % of employers that said English is significant¹⁴ for their organisation - industry comparison

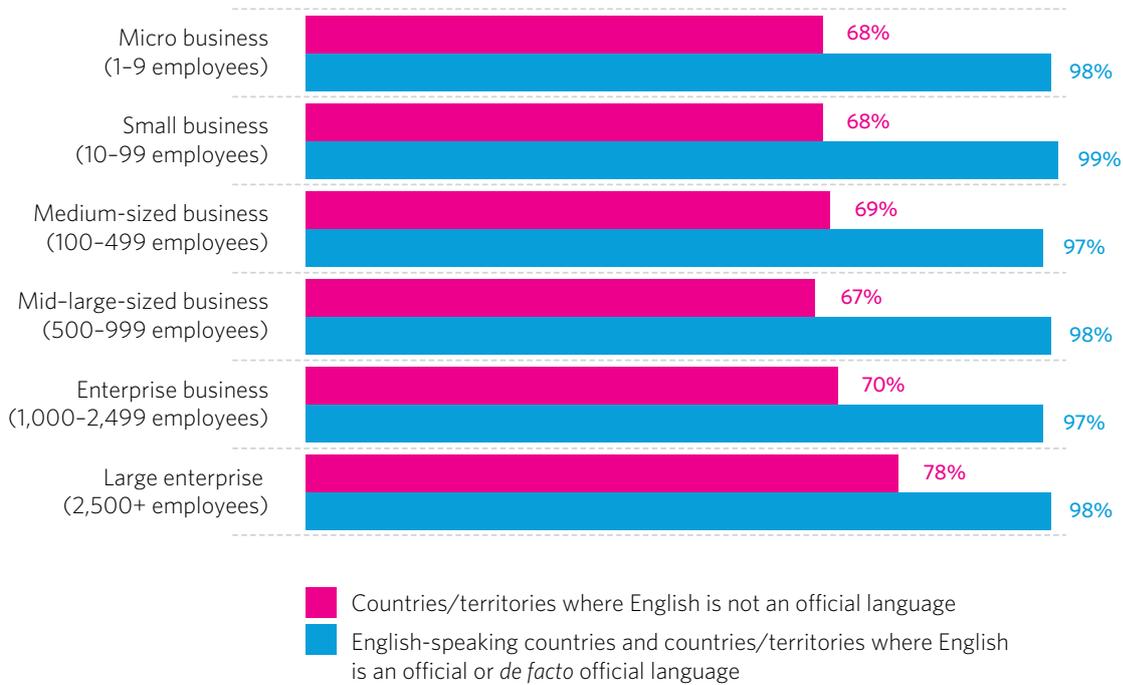


¹⁴ 'Significant' includes the following responses: 'English is the main language used', 'Extremely important', 'Very important', 'Important'.

Findings by organisation size

In countries and territories where English is not an official language, large enterprises (with more than 2,500 employees) were most likely to say that English is important. However, there is surprisingly little variation. English is important to at least two thirds of all employers across all organisation sizes.

Graph 4: % of employers that said English is significant¹⁵ for their organisation – organisation size comparison



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¹⁵ 'Significant' includes the following responses: 'English is the main language used', 'Extremely important', 'Very important', 'Important'.

4.2 The most important English language skills

Key findings

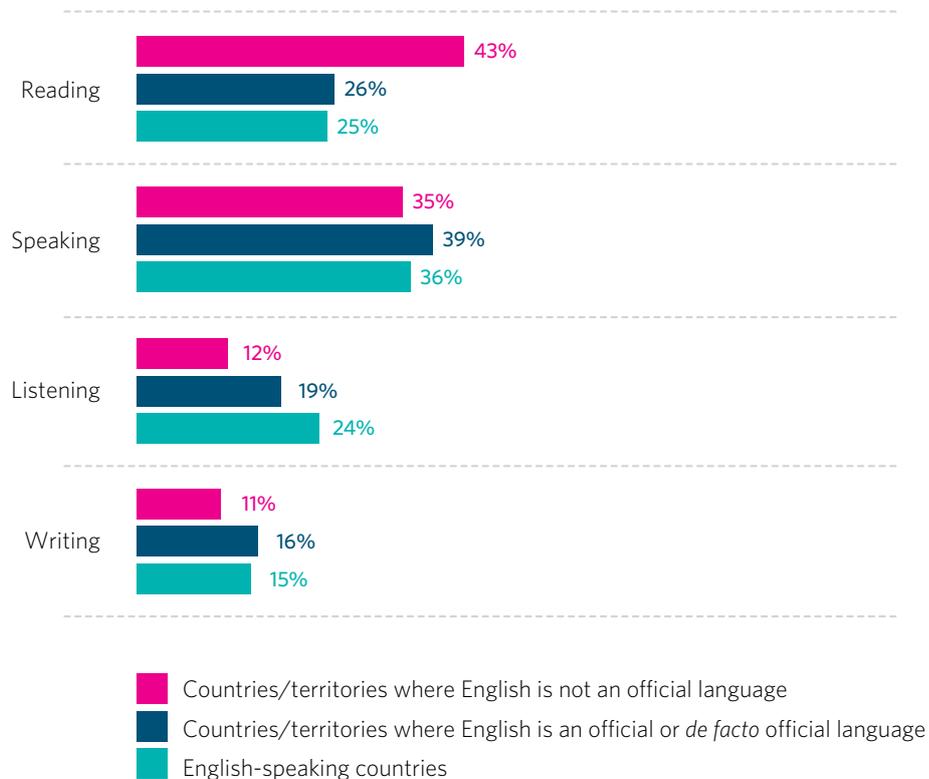
Employers say it is important to have proficiency in all four language skills (reading, writing, speaking and listening). However, the most important language skill is reading (in 12 industries), followed by speaking (in eight industries).

Reading in English is essential for maintaining professional knowledge, as it's the language most often used in international journals, contracts and instructions. Speaking tends to be the most important skill in service industries such as Travel, Leisure and Hospitality, where social interaction is a big part of the job.

Findings by language status

Across all countries and territories, the most important skills were reading and speaking. The most important skill for employers in countries/territories where English is not an official language was reading. However, for employers in English-speaking countries and countries/territories where English is an official or *de facto* official language, it was speaking.

Graph 5: The English language skill employers said was most important for their organisation – language status comparison^{16, 17}



¹⁶ Respondents who did not answer this question are not included in this analysis.

¹⁷ Throughout this report, all graphs are presented to zero decimal places. This may result in some totals adding to 101% or 99%.



Today, English is the only language that provides us with the latest knowledge. It is the language of business, science, etiquette and innovations.'

Nurbek Achilov, Founder, Board Member and Managing Director, G-Global Development Community, Kazakhstan

Findings by country and territory

There are no strong regional patterns regarding the skill which is most important to employers. For example:

- **Europe:** Reading is the most important skill for approximately half of all the employers in Belgium, Denmark, France, Germany, Portugal, Russia and Ukraine. However, speaking is the most important skill for employers in Italy, Lithuania, Spain and Switzerland.
- **East Asia:** Reading is the most important skill for approximately half of all the employers in Hong Kong, Japan and South Korea. However, speaking is the most important skill for employers in China.

Findings by industry

Across all industries, the most important skill for employers was either reading (12 industries) or speaking (eight industries). Reading is most important to employers in:

- Electronics and High Technology
- IT and Computer Services
- Aerospace and Defence.

Speaking is most important to employers in:

- Travel, Leisure and Hospitality
- Transportation and Distribution
- Recruitment and HR Services
- Retail.

Industry case study: Research and development roles

Some of the employers provided additional insights (after they had completed the survey). They stressed the importance of writing in certain job roles, in particular, for staff involved in research and development. Publication quantity and quality is one of the main factors when distributing grant money. Over 80% of academic journals¹⁸ are written entirely in English.¹⁹

¹⁸ Journals in SCOPUS (the world's largest database of peer-reviewed journals): <https://www.scopus.com>

¹⁹ van Weijen, D (2012) The Language of (Future) Scientific Communication, *Research Trends* 31, available online: www.researchtrends.com/issue-31-november-2012/the-language-of-future-scientific-communication



Scientists must be able to read, communicate and, most importantly, write in English because publications are the main measure of the outcome.'

Vsevolod Makeev, Faculty Member, Vavilov Institute of General Genetics, Russia

Findings by organisation size

There is a clear trend in the results by organisation size. For larger organisations, reading is increasingly likely to be the most important skill. Conversely, for smaller organisations, speaking becomes more important.

Large multinational companies are likely to have offices and employees in many different geographical locations and time zones. Co-workers often can't meet in person and rely on different forms of written communication, such as email, so it's even more important to use a common language to avoid potential miscommunication.

Employees in businesses spread across fewer locations are likely to have more opportunities to speak face to face. Furthermore, with smaller numbers of employees, it is more feasible for the whole team to interact directly.

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4.3 Employers' English language requirements

Key findings

There is a wide range of English requirements in countries/territories where English is not an official language, with 7% of job tasks requiring native-level English, 49% requiring advanced English, 31% requiring intermediate English and 9% requiring basic English.²⁰

The highest English language requirements are in business sectors, such as Banking, Finance and Law, where business publications tend to use complex and technical English. Language requirements are lower in Travel, Leisure, Hospitality, Transportation, Distribution and Utilities, possibly because customer-facing roles tend to use more everyday English and issues in understanding can be resolved with relatively simple English.



I think that English requirements for staff will remain on a high level. We are participating in joint research projects [and] the quality of scientific work is significantly improved.'

Igor Garkusha, Science Director, Institute of Plasma Physics, National Science Center, Ukraine

Findings by language status

In English-speaking countries, the majority of employers require a native level of English or an advanced level of English. However, in countries/territories where English is not an official language, most employers tend to require either advanced or intermediate-level English.

Findings by country and territory

There are some interesting trends in the regional results. In many East Asian countries and territories where English is not an official language, such as China, Japan and South Korea, approximately half of all jobs require either intermediate or basic-level English. However, in many European, Central Asian and Middle Eastern countries and territories, there is a much bigger demand for advanced-level English.

East Asian countries and territories have some of the lowest English language requirements. However, countries/territories in this region were also most likely to report that a high proportion of their current workforce have an English language skills gap. In contrast, many European employers said they have no skills gaps, and countries/territories in this region have some of the highest English language requirements.

The survey findings indicate that English language requirements are influenced by the skills that are actually available. Employers' English language requirements are, in part, about being pragmatic.

²⁰ The remaining respondents answered 'Don't know' or 'Not applicable'

Findings by industry

In Media, Entertainment and Arts, Law, Financial Services and Banking, over a fifth of all jobs require native-level English. However, it is worth noting that these industries received a higher proportion of responses from employers located in English-speaking countries and countries/territories where English is an official or *de facto* official language.

Other industries, such as Construction and Property, FMCG, Recruitment and HR Services, Transportation and Distribution, and Utilities, received a high proportion of responses from employers located in countries where English is not an official language. These industries were more likely to require a mixture of advanced and intermediate-level skills.

See Graph 6 on the next page.

Findings by organisation size

English language requirements are very similar across all organisation sizes, with approximately half of employers requiring advanced-level English. Large enterprises are most likely to require native or advanced-level English (two thirds of all roles).

Company case study: Rakuten

Increasing numbers of multinational companies are making English their common corporate language – for example, Airbus, Daimler-Chrysler, Nokia, Renault, Samsung and Microsoft Beijing.²¹

Rakuten, Japan's largest online marketplace, made English their official business language in 2010. Their goal is to become the leading internet services company in the world. Employees were required to demonstrate English language proficiency within an agreed time period, or risk demotion or dismissal.

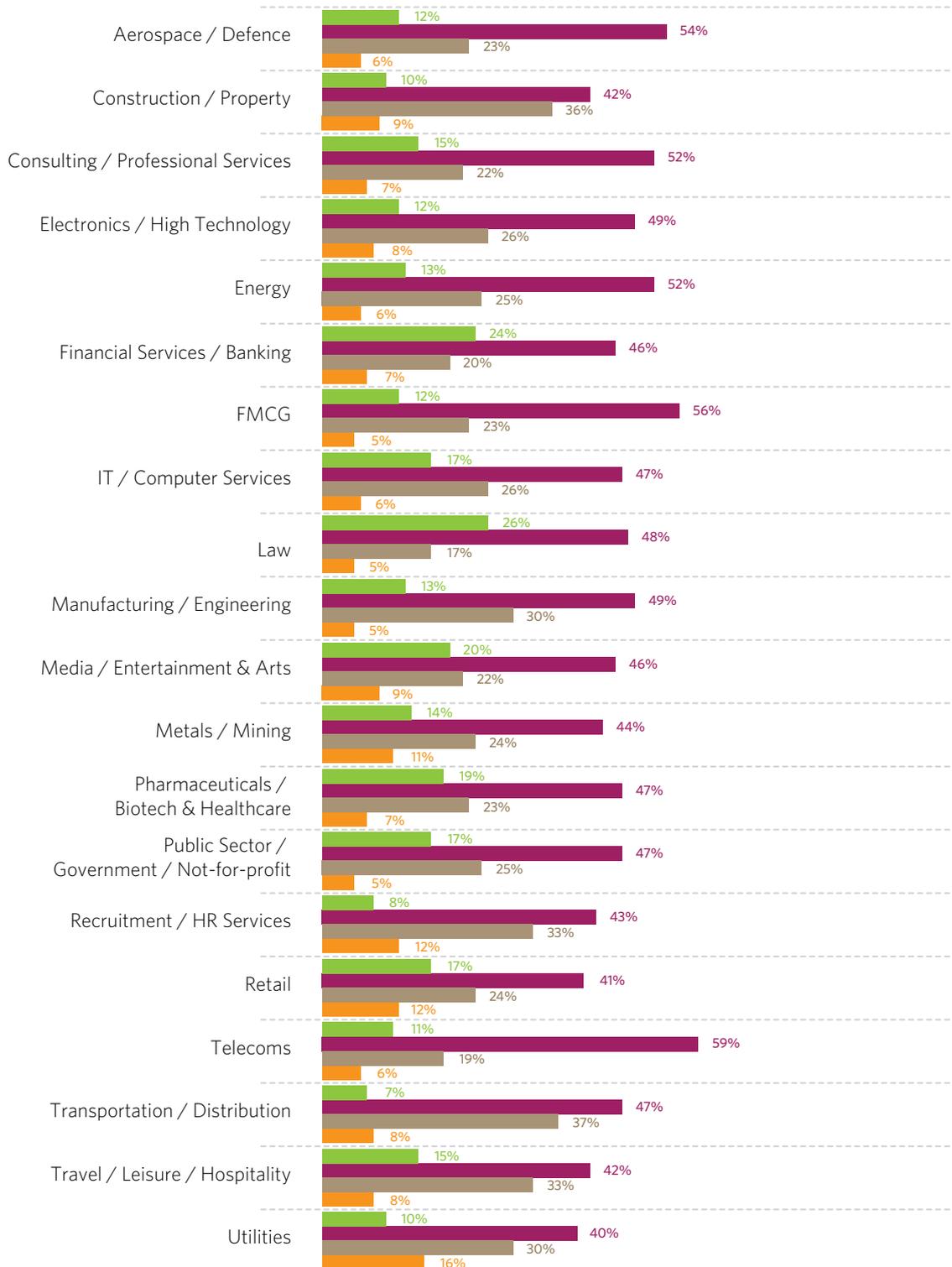
By 2015, the organisation announced that the average employee's English language score had increased since the initiative began.²²

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²¹ Harvard Business Review (2015) *Global Business Speaks English*, available online: <https://hbr.org/2012/05/global-business-speaks-english>

²² Japan Times (2015) *Rakuten forges ahead in English*, available online: www.japantimes.co.jp/opinion/2015/05/23/editorials/rakuten-forges-ahead-english/#.V-y-dfkrLmE

Graph 6: The level of English required - industry comparison*



* The remaining respondents answered 'Don't know' or 'Not applicable'.



4.4 How many employers have an English language skills gap?

Key findings

In every industry, there is a gap between the English language skills required and the skills that are actually available. Interestingly, there is little difference between large, medium-sized and small employers. Across all company sizes there is at least a 40% skills gap.

The biggest skills gaps are found in:

- **internal-facing roles**, such as HR and Personnel, Accounting and Finance, Production and Logistics. External-facing roles, such as Marketing, Sales and Customer Services, tend to have smaller skills gaps.
- **countries and territories where English is not an official language**, where some of the highest skills gaps are in China, Japan, Russia and South Korea.

The lowest skills gaps are in middle and top management, where there is a 25% skills gap.

Countries and territories that have historically traded with non-English-speaking countries often have the highest English skills gaps. The gap is smaller in countries/territories where English is an official or *de facto* official language (e.g. Singapore and India).



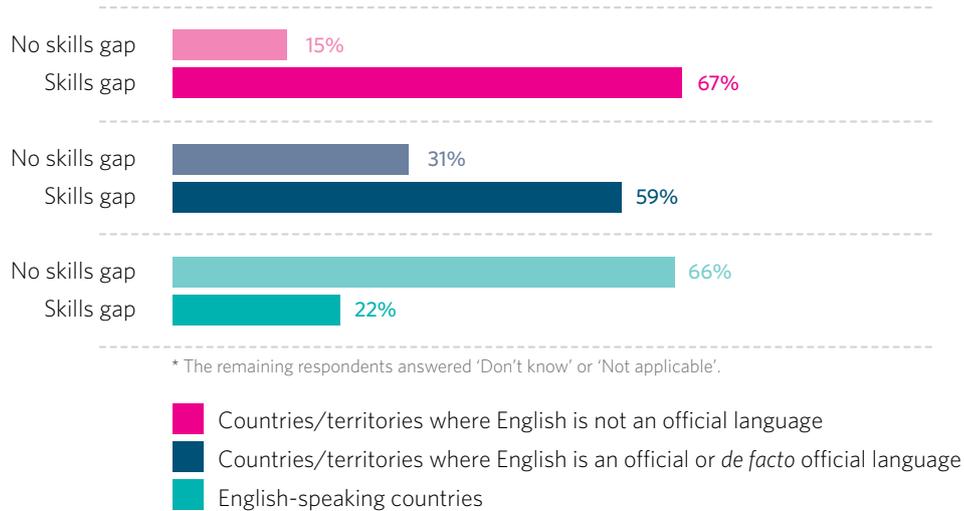
The English language requirements of our staff can only increase in the next 10 years, because our business will depend more and more on global business.'

Natsuki Segawa, Manager, Aerospace Systems, ITOCHU Corporation, Japan

Findings by language status

In English-speaking countries, two thirds of the workforce have no English language skills gaps. The highest skills gaps are in countries/territories where English is not an official language, with almost one in five employers reporting that over 70% of their workforce has a skills gap.

Graph 7: English language skills gap – language status comparison*



In countries and territories where English is not an official language, the highest skills gaps are in Accounting and Finance, Human Resources and Personnel, and Production, with half of employers reporting that at least 40% of the workforce has a skills gap. Top management, middle management and marketing roles are most likely to have no skills gap.

Findings by country and territory

East Asian countries/territories, particularly China and Japan, were most likely to report that a high proportion of their workforce had an English language skills gap. Very few East Asian employers said they had no skills gap.

In contrast, many European employers said they had no skills gap – Belgium (65% of employers), Switzerland (47%), France (36%), Denmark (33%) and Germany (27%).

Findings by industry

The industries most likely to have no skills gap were Law (38% of all employers), Telecoms (34%), Financial Services and Banking (32%), Aerospace and Defence (31%), Electronics and High Technology (30%), and Media, Entertainment and Arts (30%).

The industries most likely to report that a high proportion of their workforce had an English language skills gap (Recruitment and HR Services, Utilities, and Construction and Property) received a high proportion of responses from employers located in countries/territories where English is not an official language.

Industry case study: Aerospace and Defence

Aerospace and Defence has one of the lowest English language skills gaps. Furthermore, in countries/territories where English is not an official language, it was the industry most likely to say that English is significant²³ for their work.

This result isn't unexpected because, since 2008, the International Civil Aviation Organization (ICAO) has made English language proficiency mandatory for all Air Traffic Controllers and Flight Crew staff who work with international flights.²⁴

Findings by organisation size

Overall, the findings were similar across all organisation sizes. However, micro businesses, small businesses and large enterprises were most likely to have no English language skills gap. Medium-sized, mid-large-sized and enterprise businesses were slightly more likely to have a skills gap in a high proportion of their workforce.

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²³ 'Significant' includes the following responses: 'English is the main language used', 'Extremely important', 'Very important', 'Important'.

²⁴ ICAO, Language Proficiency Requirements (LPR), available online: www.icao.int/safety/lpr/Pages/Language-Proficiency-Requirements.aspx

4.5 Evaluating English language skills during recruitment

Key findings

98.5% of employers have at least one method of assessing English language competency. The most common method is to interview applicants in English. In addition, over a quarter of all employers use an external English language test created by experts.

The use of external English language tests created by experts indicates how important English language skills are to employers and the need to assess language skills in a thorough and reliable way.



We need to cultivate an English environment in the office, provide courses and test regularly.'

Prima Sukma Permata, Engineer, Nuvoton Technology Corporation, Taiwan

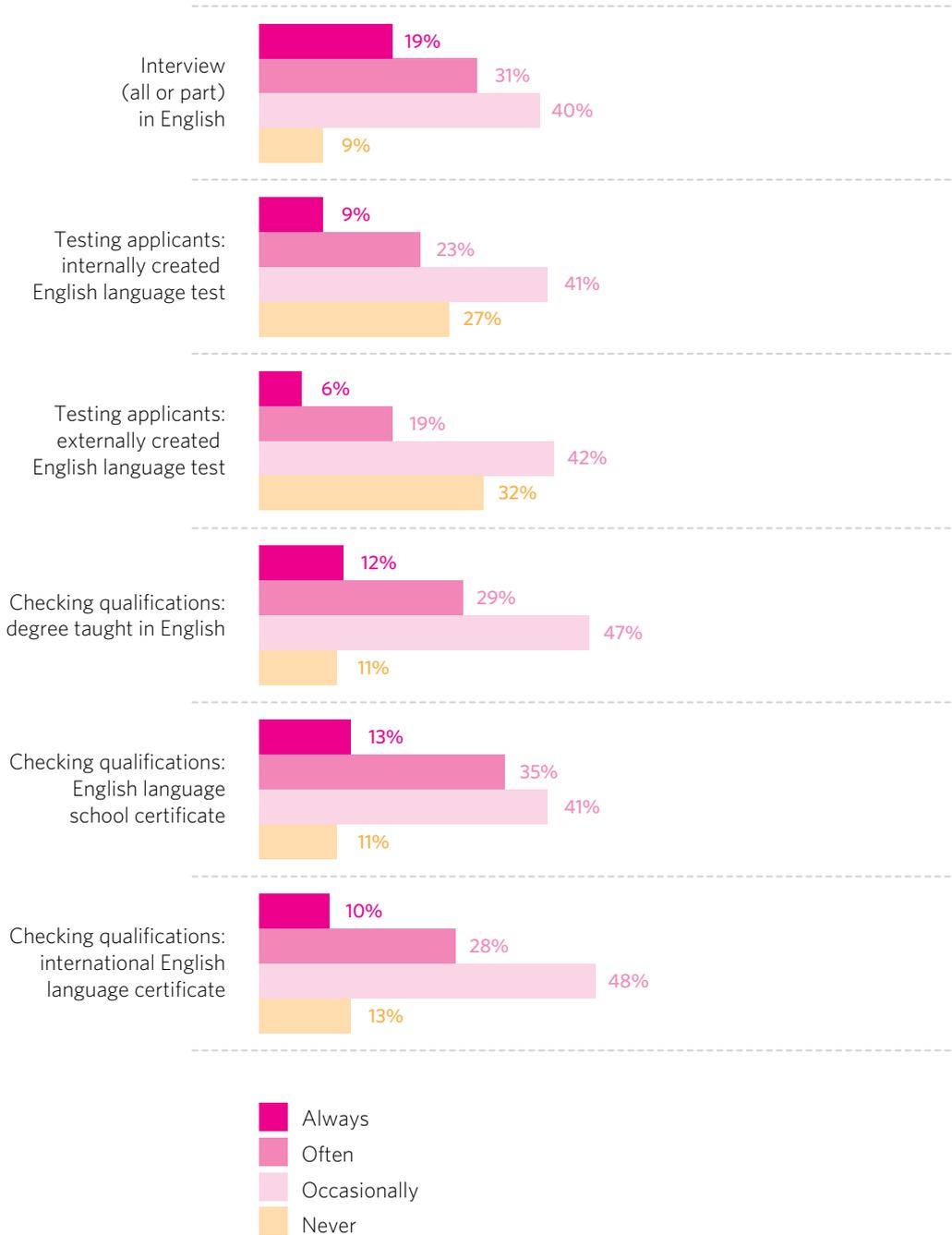
Findings by language status

In English-speaking countries, employers rely on job interviews. Over three quarters of employers say they always evaluate applicants' English language skills in the job interview. These employers are least likely to test applicants, with approximately half saying they never use a test during the application process.

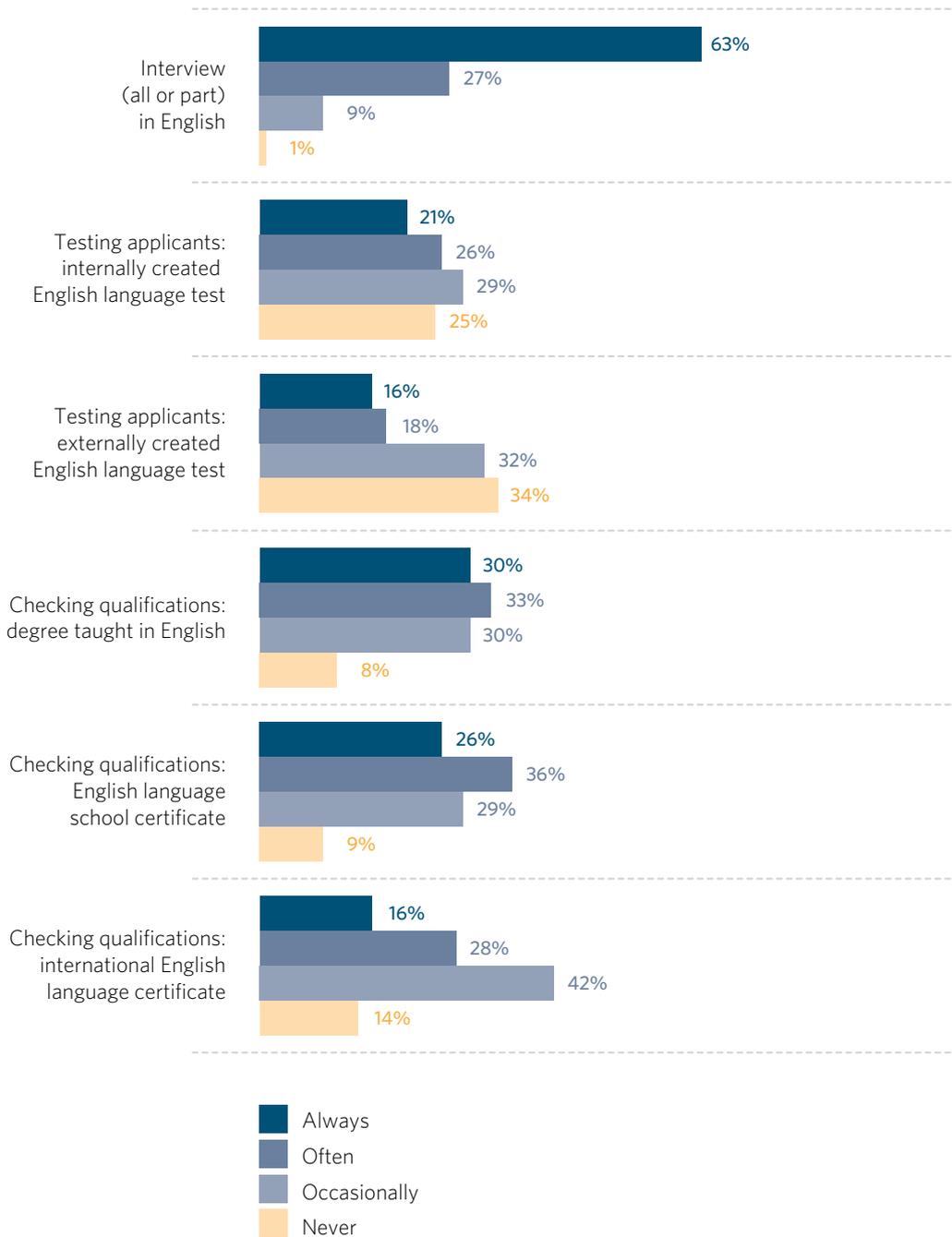
In contrast, employers in countries/territories where English is not an official language use a wide range of methods for evaluating English language skills – on some occasions interviewing in English, on other occasions testing applicants, and on others checking English language qualifications.

Graphs 8-10: Methods for evaluating English language skills - language status comparison.

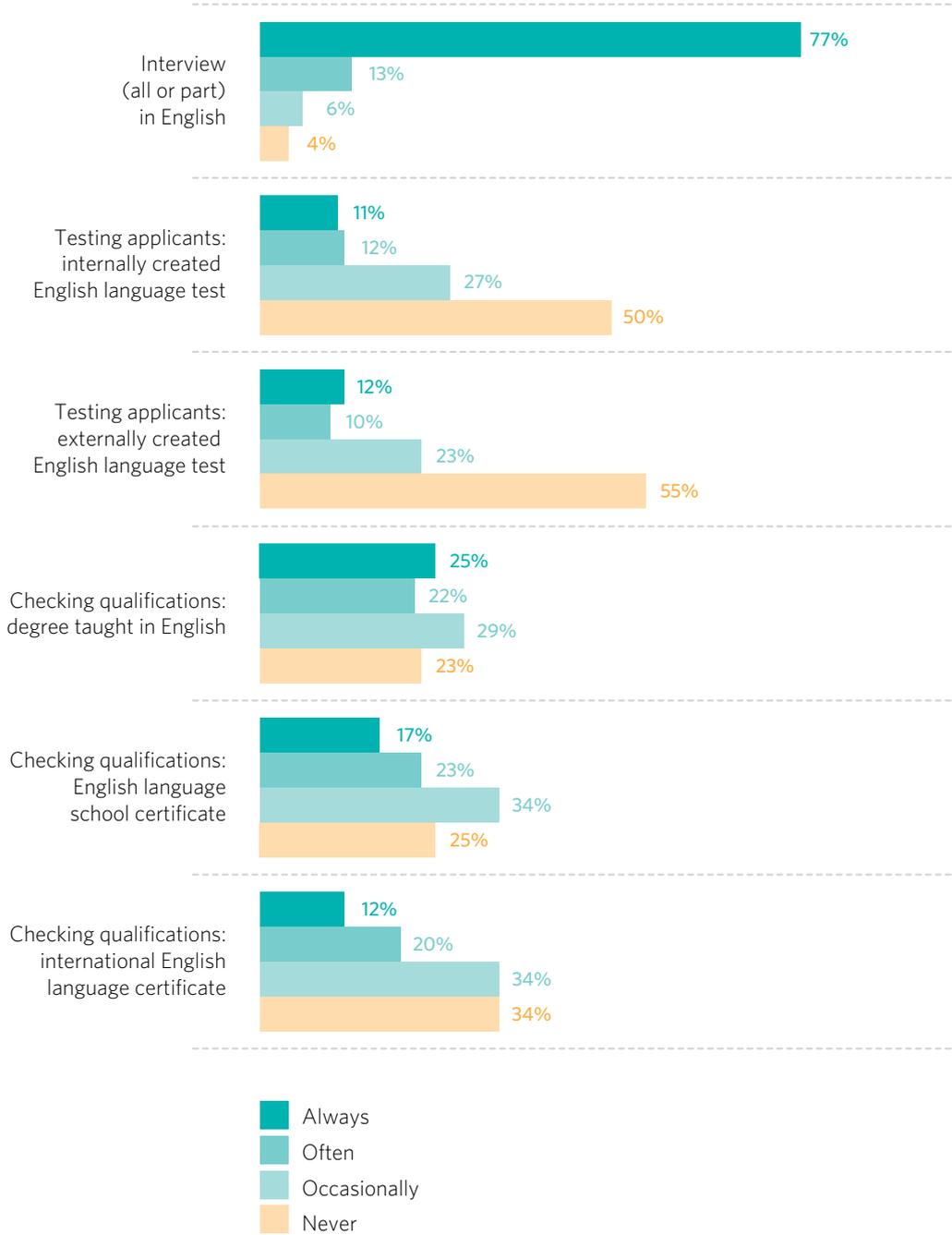
Countries/territories where English is not an official language



Countries/territories where English is an official or *de facto* official language



English-speaking countries



Findings by country/territory, industry and organisation size

The approach to evaluating English language skills is relatively similar across different industries, organisation sizes and countries/territories where English is not an official language. Overall, a range of different methods are used to evaluate English language skills – there is no reliance on one particular method.

The majority of employers do not ‘always’ use rigorous, research-based, reliable methods for evaluating English language skills. These methods could include:

- using English language tests created by experts
- checking qualifications focused specifically on testing English language ability.

These normally provide information about an applicant’s ability in each of the four key language skills (reading, writing, listening and speaking). This makes it easier for organisations to specify the exact language skills they need and to be confident that applicants have the right English language skills to succeed.

In many countries/territories, a high proportion of the workforce has an English language skills gap. It’s possible that this gap starts at the recruitment stage, with the use of informal and subjective methods of evaluating skills.

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4.6 Benefits for employees

Key findings

In countries and territories where English is not an official language, approximately half of all employers offer a better starting package to applicants with good English language skills. Good English skills can lead to faster progression through job grades (50% of employers) and higher salary increases (49% of employers).

Better packages are most common in countries and territories where English is not an official language, such as Brazil, China and Chile. These countries/territories also reported having some of the biggest English skills gaps.



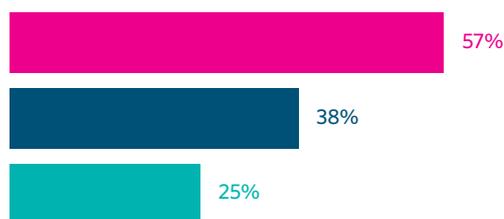
We live in an increasingly connected world and communication is an important part in this process. [People who] can communicate are more likely to grow professionally and personally.'

Mário Magalhães, Production Engineer, GGMR, Brazil

Findings by language status

In countries and territories where English is not an official language, over half of all employers offer better packages to applicants with good English skills. Better packages are offered by only a quarter of employers in English-speaking countries.

Graph 11: Percentage of employers that offer better packages to applicants with good English skills – language status comparison



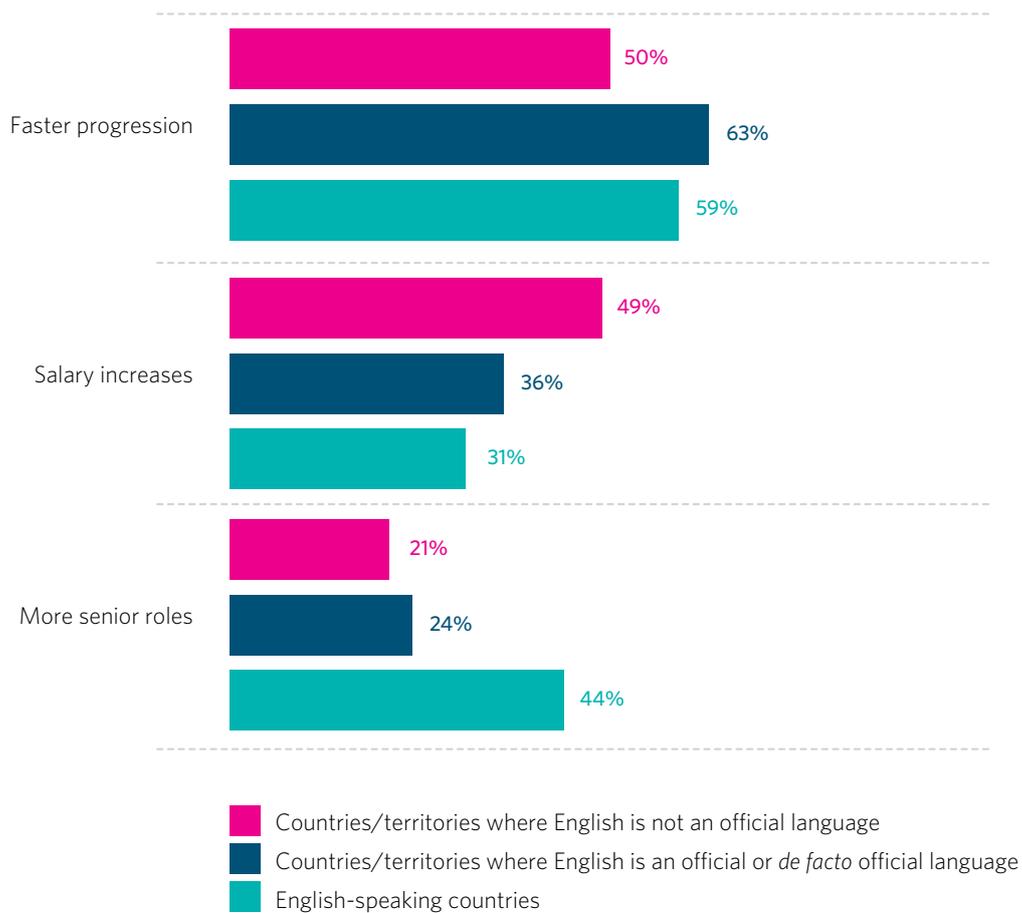
- Countries/territories where English is not an official language
- Countries/territories where English is an official or *de facto* official language
- English-speaking countries

‘Better packages’ take different forms. In English-speaking countries and countries/territories where English is an official or *de facto* official language, employers are most likely to offer faster job progression. In countries and territories where English is not an official language, employers are most likely to offer salary increases and/or faster job progression.

According to the Harvard Business Review, recruitment and HR managers around the world report that applicants with exceptional English language skills (compared to the average level in their country/territory) earn 30-50% higher salaries.

Research shows a direct correlation between English language skills and economic performance. This is a virtuous cycle, with improving English skills driving up salaries, which in turn creates more money to invest in further language training.²⁵

Graph 12: Employers that offer better packages – the type of career benefits applicants receive



25 Harvard Business Review (2013) *Countries with Better English have Better Economies*, available online: <https://hbr.org/2013/11/countries-with-better-english-have-better-economies>

Findings by country and territory

There is no clear regional trend in the countries and territories most likely to offer better packages. The top 10 countries/territories most likely to offer better packages are from diverse regions of the world: Europe and Central Asia (Kazakhstan and Ukraine), East Asia and the Pacific (China and Taiwan), Middle East and North Africa (Egypt, Iraq and Saudi Arabia), Latin America and the Caribbean (Brazil and Chile) and South Asia (India).

See Graph 13 on next page.

Findings by industry

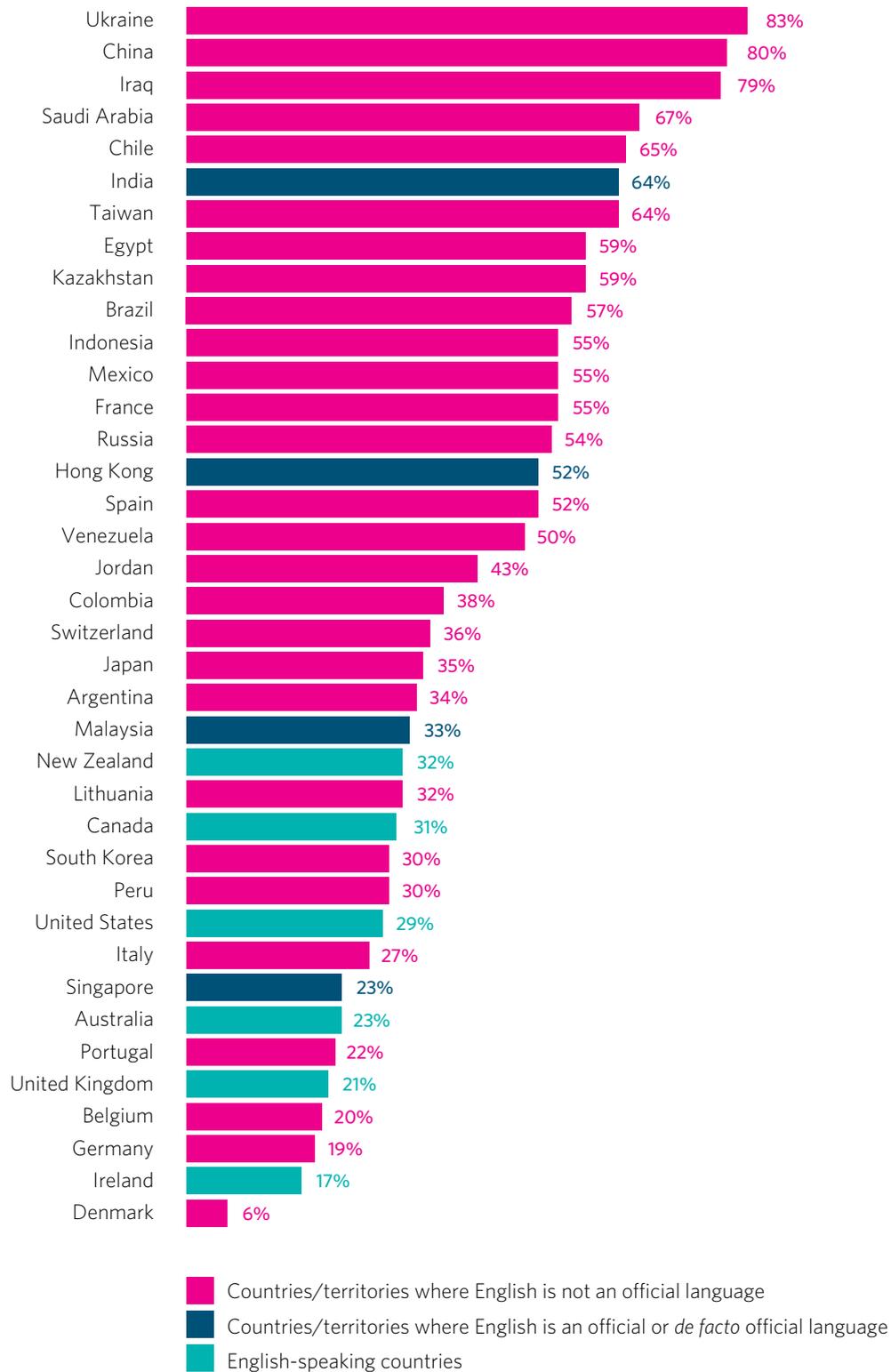
The industries most likely to offer better packages to applicants with good English skills are Recruitment and HR Services, Travel, Leisure and Hospitality, and Construction and Property. Across all countries and territories, better packages tend to be least likely in the Metals and Mining industry.

Findings by organisation size

Large enterprises are the least likely to offer better packages to applicants with good English skills. This appears to be particularly true in English-speaking countries and in countries/territories where English is an official or *de facto* official language – where in general, the smaller the organisation, the more likely they are to offer better packages to applicants with good English skills.

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Graph 13: % of employers that offer better packages to applicants with good English skills – country/territory comparison



5 Future trends

In the long term, changing technology and demographics could influence the demand for English. However, in the short to medium term, business demand for English is predicted to continue growing.



The future is unpredictable. Language is also strongly linked to global demographic shifts as well as the economic prowess of a nation, among other things. As the rate of change hastens globally, the importance of the English language will also adjust to that.'

Yin Choy Chen, Chief Strategy Officer, Motion Laboratories Inc., USA

Business demand for English

In recent years, there has been unprecedented investment in English language learning. However, the responses to this survey show that there is overwhelming business demand for English language skills.

English is the language of global business, and the globalisation trend is predicted to grow even further. By 2030, global trade in goods is forecast to nearly double to \$18 trillion, up from \$10.3 trillion in 2013.²⁶

The sheer size of the English language skills gap is surprising. English has been an international *lingua franca* for some time.

It indicates how prevalent English requirements have become - in all industries, all organisation sizes, all functions and at all management levels. English language skills have never been more essential to succeed and progress at work.

The English language learning market - short-term trends

The global English language learning market is currently one of the fastest-growing parts of the education sector (other than the educational technology market). An estimated 1.5 billion people are currently learning English: one in seven of the world's population.²⁷

Country case study: China

China is the largest market for English language learning, with an estimated 400 million English language learners. By 2020, it's predicted that the number of English speakers in China will outnumber native English speakers in the rest of the world.²⁸

²⁶ PwC (2014) *Global Economy Watch: What are the prospects for global trade growth?*, available online: <http://press.pwc.com/News-releases/volume-of-global-goods-trade-set-to-nearly-double-by-2030/s/89fc2c50-a599-4040-831d-9a9385629f00>

²⁷ UK Government (2013) *International Education - Global Growth and Prosperity*, available online: www.gov.uk/government/uploads/system/uploads/attachment_data/file/340601/bis-13-1082-international-education-accompanying-analytical-narrative-revised.pdf

²⁸ Technavio (2016) *Top 3 Emerging Trends Impacting the English Language Training Market in China From 2016-2020*, available online: www.businesswire.com/news/home/20160919005722/en/Top-3-Emerging-Trends-Impacting-English-Language



More than a billion people are learning English around the globe right now and the number is increasing exponentially. English is important because it's a global language and although it's not the first language in many countries, it is taught as the foreign [language] subject.'

Ghadir Ali Shah, Regional Access Network Coordinator, PTCL, Pakistan

The English language learning market - medium-term trends

The English language learning market in China is forecast to have an annual growth rate of approximately 20%, with the majority of growth coming from school-aged learners (Pre K-12).²⁹ In other regions, there is a similar focus on English language learning in schools. A recent EU study found that 94% of upper-secondary school European students are learning English as a foreign language.³⁰

The use of English in higher education is also increasing. For example, English-medium undergraduate and master's degree programmes in Continental Europe have more than tripled over the last seven years.³¹

These trends will take time to reach businesses. However, the outlook in the medium term is that even more of the future workforce will be English speaking.



The only way to have a generation with a good command of the language is to start them at a young age in school, which was how it was during my time. My command of the national language certainly did not suffer for the good command of English that I have.'

Doreen Goh, Managing Director, YSG Biotech, Malaysia

²⁹ Technavio (2016) *Top 3 Emerging Trends Impacting the English Language Training Market in China From 2016-2020*, available online: www.businesswire.com/news/home/20160919005722/en/Top-3-Emerging-Trends-Impacting-English-Language

³⁰ Eurostat (2013) *English reinforces its status as Europe's 'lingua franca'*, available online: www.euractiv.com/section/languages-culture/news/eurostat-english-reinforces-its-status-as-europe-s-lingua-franca

³¹ Wächter, B and Maiworm, F (Eds) (2014) *English-Taught Programmes in European Higher Education. The State of Play in 2014*, ACA Papers on International Cooperation in Education.

3. What percentage of your organisation, by role, has the English language skills required to achieve their objectives?

	I don't know	Not applicable	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	We are planning on improving
Top management	<input type="radio"/>												
Middle management	<input type="radio"/>												
Marketing	<input type="radio"/>												
Accounting & Finance	<input type="radio"/>												
Sales	<input type="radio"/>												
Human Resources or Personnel	<input type="radio"/>												
Production	<input type="radio"/>												
Research & Development	<input type="radio"/>												
Customer Services	<input type="radio"/>												
Logistics / Distribution	<input type="radio"/>												

Please answer the following questions based on the English language skills of employees whose first language is not English.

4. For your organisation as a whole please rank the following English language skills in order of importance from 1 to 4 (where 1 is the most important and 4 is the least important).

Rank

Reading _____

Writing _____

Listening _____

Speaking _____

5. How does your organisation evaluate the English language skills of applicants (given their native language is not English)?

	Never	Almost never	Sometimes	Fairly often	Very often	Always
By checking if the applicant studied a degree course taught in English	<input type="radio"/>					
By checking if the applicant left school with an English language qualification	<input type="radio"/>					
By checking an international English language certificate presented by the applicant at their interview	<input type="radio"/>					
By conducting part or all of the interview in English	<input type="radio"/>					
By testing the applicant through an English test created by your organisation	<input type="radio"/>					
By testing the applicant, during the interview process, with an English test created outside of your organisation	<input type="radio"/>					

6. Does your organisation offer a better package to applicants that have good English skills?

- Yes
 No

If yes, how? Please select.

- More senior roles
 Faster career progression
 Higher starting salary
 Other - please specify

Appendix 2: QS Global Employer Survey

The QS Global Employer Survey has now been in operation for over 20 years, providing an extensive database of employers in key markets worldwide.

The survey is adaptive. An employer's responses to early questions determine which questions they receive for the remainder of the survey. For example, they might receive a series of questions about undergraduate degrees, master's degrees, MBAs, PhDs and/or English language skills.

Sampling

The survey is distributed worldwide to employers using the following methods:

1. Respondents who took part in previous years of the survey are invited to respond again and provide an updated viewpoint.
2. Partner organisations, such as international media organisations and job portals, are invited to distribute survey invitations.
3. Educational institutions are invited to submit lists of employers that QS may then invite to participate in the survey.*

* Submitted lists are screened. In addition, sampling is applied where any educational institution submits more than 400 employers.

Filtering

Once the responses are received, a number of steps are taken to ensure the validity of the sample:

1. There is an extensive filtering process to identify and discard any speculative or test responses.
2. QS then runs a number of processes to screen for any manipulation of survey responses.**

** It is well documented, on the basis of other high-profile surveys, that educational institutions will sometimes attempt to get respondents to answer in a certain fashion. If evidence is found to suggest that an institution has attempted to overtly influence results, any responses acquired through their submitted list of employers (see Sampling, Point 3) are discarded.

A total of 6,224 employers completed the series of questions about English language skills. The filtering processes identified that 5,373 of these were complete responses. These filtered responses form the basis of the analysis in this report.

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English at Work: global analysis of language skills in the workplace has been compiled by Cambridge English in collaboration with QS. Findings from a series of questions included in the annual QS Global Employer Survey inform the first global, cross-industry overview of English language skills at work.

Cambridge English Language Assessment is part of the University of Cambridge. We develop and produce the most valuable range of qualifications for learners and teachers of English in the world. Over 5 million people in 130 countries take our exams every year. Around the world over 20,000 universities, employers, government ministries and other organisations rely on our exams and qualifications as proof of English language ability. Cambridge English exams are backed by the work of the largest dedicated research team of any English language test provider.

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www.qs.com

All details are correct at the time of going to print in November 2016.

