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## Executive Summary

**ESL Job Map** makes finding and applying to ESL (English as a Second Language) jobs fast and easy.

Problem	Solution
English teaching job boards present jobs in a way that does not allow filtering by location, job type (full-time or part-time), or any other field. The posts themselves do not present relevant information in a consistent or organized manner. This makes finding the type of work one is looking for frustrating and takes hours.	ESL Job Map puts English teaching jobs on a map for easily finding work near you. The job details will appear immediately on mouseover (instead of needing to load a new page) and the information formatted in a consistent manner. This makes finding relevant jobs much faster and easier.

### Target Market

**English teachers** looking for jobs, are our sites primary users and **placement agencies** who post English teaching jobs are our customers. Approximately \$600,000 is spent on English job postings fees per year in Korea, \$3 million in East Asia and the English teaching job placement industry earns \$60 million.

Job Placement in EA		
\$60M	East Asia	
	Job Posting	
	\$3M	Korea
		\$700K

### Milestones and Traction

- 1) ESL Job Map, previously launched three times in 2017. From the first launch, our Facebook ads had a 10/10 relevancy score, meaning our ads were in the top 10% most likely to be interacted with by users. When shared with expats in Korea Facebook groups it was positively received despite being an ad, and got 30 likes. When we closed the site and opened a form to provide feedback, the primary complaint was that the site was no longer up.
- 2) We had trouble getting agencies to try posting jobs on our site for the first two launches. On our 3rd launch in October, we had improved the job posting interface enough that agencies posted their own jobs, and we had around 40 natural posts in the first week.
- 3) Some agencies did not receive enough applications to continue posting without encouragement. We did not have the budget and manpower to keep the agencies coming back, and increase marketing to teachers to ensure more jobs get applications, so we closed down the site again.

### Relaunch - Financial Projections

Units are in 1,000,000 Korean won

Month	0	1	2	3	4	5	6
Stage	Pre-launch preparation	Launch and Promotion			Monetization Phase		
Expenses	-4.1	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8
Revenue	0	0	0	0	.2	3	5.5
Total Profit	-4.1	-2.8	-2.8	-2.8	-2.6	0.2	2.7

Following 1 month of monetizing testing in month 4, we will charge 10,000 KRW per job posting.

### Revenue Projections

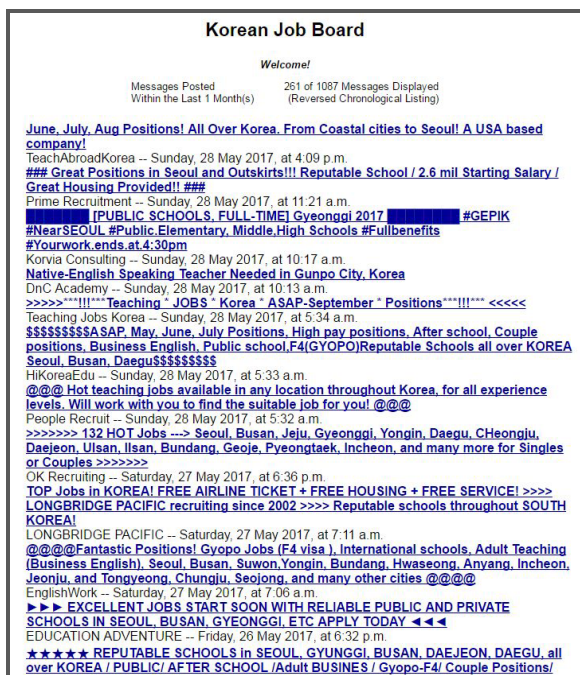
Timeline	Market capture	Annualized Revenue
End of year one	1/3 of the Korea	\$225,000
End of year two	1/2 of the East Asia	\$1,500,000

## Opportunity

### The Challenge

#### How can we make finding English teaching work easier and more efficient?

Below is a screenshot of the market leader, ESLCafe's job board. It is very inconvenient for job seeking English teachers for a number of reasons:



1) Job locations are not displayed on a map and are not searchable

2) Tutoring (only legal to do on a residence visa) and full-time (visa sponsorship is provided) jobs are not separated. This results in wasted time sifting through irrelevant jobs and deportation when visa rules are not followed<sup>1</sup>

3) Job details are not forced to follow any formatting standard which makes comparing job opportunities tiresome

4) A single job posting may list anywhere from 1-150 jobs. To see actual job titles you need to open each post.

**We have already fixed these issues.** These are simply the most egregious inconveniences. The current version of ESL Job Map solves these, reducing job seekers' search time from hours to minutes and makes the process painless. See the next section Our Service for details.

**The website is not expensive to maintain.** There are no marginal costs to offering better services. Based on our previous launches, 2000 sessions translates to about \$10 in server costs. Even if every English teacher in Korea checked the site once per month, server costs would only be a few hundred dollars.

**How large is the challenge?** There are only about 17,000 English teachers in Korea. We have tracked and have short profiles on 131 English placement agency representatives, and expect their total number to be in the low 100s. So doing promotions and reaching out to both these groups at the same time can be done on a reasonable budget as outlined in Launch Plan section.

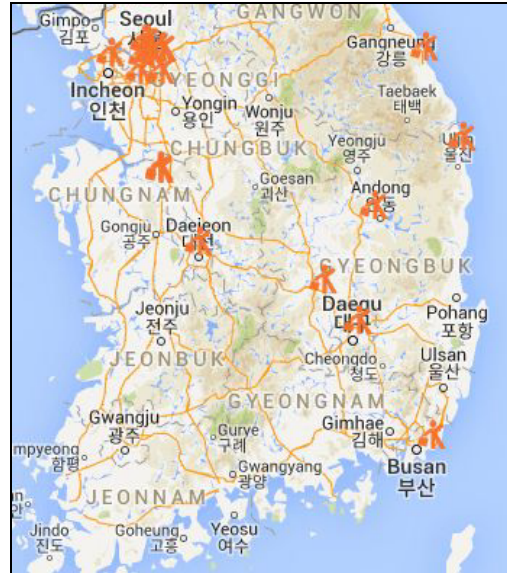
<sup>1</sup><http://www.cbc.ca/news/canada/british-columbia/offshore-international-school-south-korean-chi-s-1.4087304>

## Our Service

### Features

ESL Job Map is superior to competing English teacher job boards in a number of ways, making the job finding and application process much easier and faster. ESL Job Map's unique strengths include:

- 1) You can much more easily find jobs near you when they are on a map, rather than using a search feature
- 2) Part-time jobs(which need F-visas) and full-time jobs (which sponsor E-visas), are completely separate. People are only looking for either a full-time job OR part-time work and they can view just the jobs they are interested in on our site



**CHUNGNAM** ×

**CHUNAN/SUBWAY/PART TIME/SHORT HOURS /F VISA**

**Pay-Rate:** 1.9-2.1MIL

**Days:** 3DAYS (MON,WED,FRI)

**Hours:** 2PM- 7PM


**Class Type:** ELE.MIDDLE/ 55 MIN - 1CLASS (A WEEK)

**Special Requirements:** F VISA

**Contact Person:** SAM

[Email](#)

[Call](#)



- 3) You don't have to click a job and load a new page to see the job details. You can just mouseover and all relevant information pops up instantly and in a consistent format

- 4) Apply with a click! Unregistered users can fill out a few fields and submit their cover letter right away. Registered users can apply even faster, as we will save their application information

You can preview the site on our test server at:

<http://13.125.19.31/>

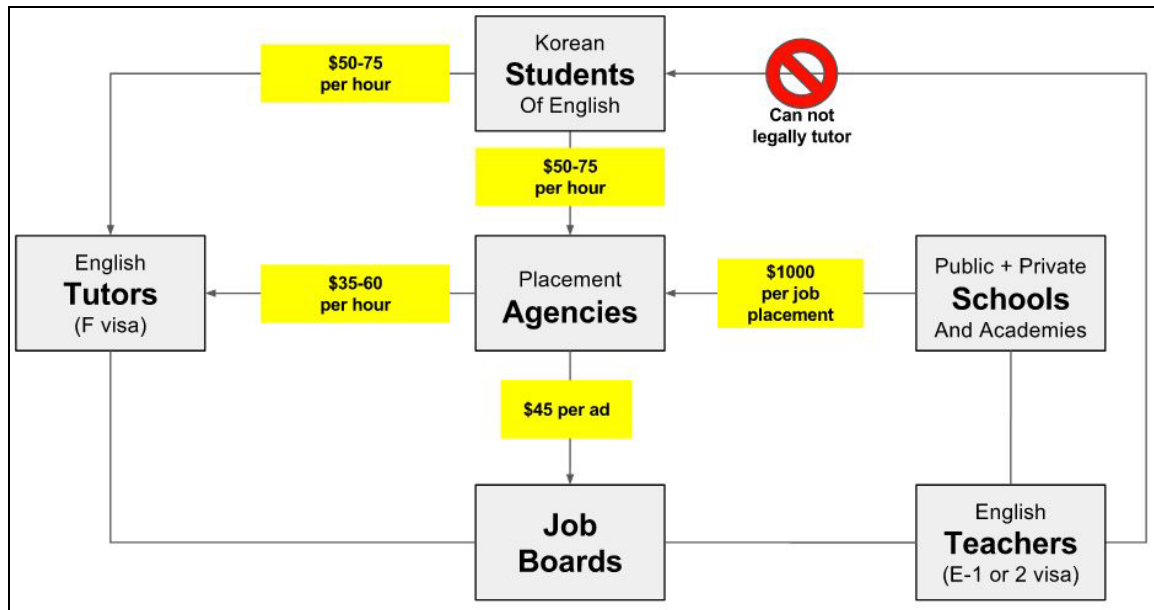
Login: test@test.com Password: test12

### Technology

The current version of the site is made using customized WordPress and Google Maps. The site is being redeveloped in Django and will once again utilize Google Maps.

## Market Analysis

### Market Structure - English Teacher Placement



### English Teachers and Tutors

English teachers who are looking for full-time positions, and are generally employer sponsored with E-1 or E-2 visa. However, some have residence (F-2, 4, 5 or 6) visas which allows them to work in Korea without employer sponsorship. We will refer to everyone who can do full-time teaching as **English teachers** or just **teachers**. Those who wish to tutor legally need to be on a F visa. When specifying just them, we will call them **English tutors**.

As of 2017 there are 17,017 English teachers on E-1 and E-2 visas<sup>2</sup>, as well as some who have F visas. E-1 and E-2 visas do not permit employment outside of that provided by their sponsoring school, unless permission is given by their visa sponsoring employer for a secondary English conversation teaching job. There is no way for them to legally do private tutoring. In 2017 there was even a crack down by the Korean government, on English teachers who were teaching subjects besides English conversation in their schools.<sup>3</sup>

<sup>2</sup>[http://www.moj.go.kr/doc\\_html/viewer/skin/doc.html?fn=b361af59d271b6b7f06c0f5743c86d2c&rs=/doc\\_html/viewer/result/201711/](http://www.moj.go.kr/doc_html/viewer/skin/doc.html?fn=b361af59d271b6b7f06c0f5743c86d2c&rs=/doc_html/viewer/result/201711/)

<sup>3</sup><http://www.cbc.ca/news/canada/british-columbia/offshore-international-school-south-korean-cbi-s-1.4087304>

It is hard to ascertain the number of English tutors. There are 79,555 F-2, 4, 5 and 6 visa holders as of December 2017, from the 7 native English speaking countries<sup>4</sup>, but we don't know what proportion of them tutor English or how often they do it. Nevertheless, many placement agencies also arrange tutoring sessions, and post tutoring jobs.

### **Regular Schools**

Include government run and private schools all the way from elementary to university. Government run schools have a government agency which manages recruitment, and teachers are encouraged to apply to the government agency directly. However, government agencies still pay placement agencies placement fees if teachers come in through the placement agency. This results in placement agencies sometimes being involved in the process. Universities each search for English professors in their own way, with some using placement agencies, and some posting jobs themselves.

### **Private Academies (학원)**

Private academies are the largest customer segment for placement agencies. There are many small ones and some large chains. Small academies are run by both Koreans, and former English teachers who have attained residence visas.

### **Placement Agencies (Customers)**

There are many combination tutoring/ placement agencies in Korea. They both place English teachers into private academies and regular schools, as well as match individual Koreans who are looking for 1-on-1 tutoring. Their employees who find English teachers will be referred to as **recruiters**.

For placements in schools the fees range from 900,000- 1,100,000 won. For setting up individual students with tutors, they take a cut of the hourly fee. They normally charge the students 50,000-70,000 won per hour, and pay the teacher 30,000 won – 40,000 won per hour. They act as the intermediary for managing payments, teacher quality and scheduling.

They post jobs on: Korea focused English teaching job boards - both paid and free, Craigslist and Facebook. We believe there are probably at most 300 recruiters in Korea. See [Appendix A](#) for how we arrived at this number.

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<sup>4</sup>[http://www.moj.go.kr/doc\\_html/viewer/skin/doc.html?fn=e28ad85e7346c1face8fa2e12e70be76&rs=/doc\\_html/viewer/result/201711/](http://www.moj.go.kr/doc_html/viewer/skin/doc.html?fn=e28ad85e7346c1face8fa2e12e70be76&rs=/doc_html/viewer/result/201711/)



### Job Boards (Competitors)

Our main competitors are sites such as the education section of craigslist.co.kr, eslcafe.com, worknplay.co.kr and small job boards that can not charge money. Craigslist is the largest by number of job postings, and ESL Cafe is the largest by number of paid job postings and is the most popular among users. All of them display jobs in list form, often displaying just a title and description and the only means of filtering being a search bar.

A number of geographically targeted English job Facebook groups exist and range in size of up to 20,000 members. They are free to use but have no sort function.

### Market Size - Korea, East Asia, the World

ESL Cafe (the largest paid English job board in Korea) charges \$75 for a single 30 day ad, or \$46 per ad when purchasing in bulk.<sup>5</sup> There are approximately 15,000 (1,250 monthly jobs x 12 months) paid English job postings per year in Korea, and at least 60,000 per year in East Asia. Meaning the annual English job board market is approximately **\$700,000 (15,000 jobs x \$48) for Korea and \$3 million for East Asia.**

Looking higher up the value chain; consulting with schools and finding them an English teacher, is a service which costs 0.9-1.1 million won (\$1000) per placement. So the total **English teacher placement market in East Asia is approximately \$60m** per year. If other English markets such as Europe, The Middle East, and Latin America are included, this could double to a **total market size of \$120 million per year worldwide.**

Job boards also have side offerings/ services, such as resume/candidate resume databases. In the future ESL Job Map could offer tutors on a map and a resume database. However splitting attention to develop less important services does not align with current plans.

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<sup>5</sup><https://www.secure-quotes.com/eslcafe/post.asp>

## Competitors - in Korea

	ESL Cafe	WorknPlay	Craigslist	Facebook groups
<b>Scope</b>	East-Asia	Korea	World Wide	City, national and job-type focused groups
<b>Posts per Month</b>	1,100 (Korea)	150 (Korea)	10,000 (Seoul) <sup>6</sup>	Can't count - High rate of cross posting
<b>Price to Post</b>	\$75-\$46	\$31 - \$49	Free	Free
<b>English teacher perception</b>	- High quality - High volume	- High quality - Low volume	- No standards - High volume	- No standards - High volume
<b>In operation since</b>	1995	2003	1995	varies by group

### ESL Cafe -----



Commonly referred to by its original name Dave's ESL Cafe, it is the first organic result on Google when searching "esl jobs in korea", and is the first to be recommended as the online place to look for jobs. Despite the weaknesses of not even having a keyword search function, and frequent job stuffing (putting many jobs into a single job posting), it is seen as being more trustworthy than Craigslist and being the largest single source of English job posting for Korea.

It charges \$75 for a single job posting, and gives discounts when buying in bulk (12 ads for \$550, which is \$46 per ad). It has about 1,100 posting per month on its Korea board, and has about 4,500 across it's four boards of Korea, China, Japan and other.

### WorknPlay -----



WorknPlay is the second organic result when searching "esl jobs in korea". It has keyword search, charges 35 - 55k Won (\$31 - \$49) per job posting and has about 150 job postings per month.

### Craigslist -----



Craigslist offers listing services for each city in Korea. To find a job one my first go to the website for one's particular city, then Jobs > Education > select employment type. While Craigslist Seoul alone has around 10,000 posts in this section per month, many of the jobs are re-posted daily so they can be near the top. The only filtering

<sup>6</sup>[http://seoul.craigslist.co.kr/search/edu?employment\\_type=1&employment\\_type=2&employment\\_type=3&employment\\_type=4](http://seoul.craigslist.co.kr/search/edu?employment_type=1&employment_type=2&employment_type=3&employment_type=4)



available is searching by a keyword within a section. It is known, but not popular to use in the expat community

### **Facebook Groups**

Facebook groups are on around a variety of niches; jobs in city X, part-time jobs, full-time jobs, etc. The majority of these groups are created and run by either a small job board, or a placement agency. They generally allow posts from competing agencies, but give their own preferential treatment, or in the case of job boards, they try to force the people posting to the group to also post to their job board.

The people who join these groups have a desire for English jobs which are filtered in some way, and are therefore ideal potential users of ESL Job Map. We have notes of which companies run which groups, so that when we occasionally post ESL Job Map jobs to those groups, we can link to a job from the relevant company if possible. While perhaps technically Facebook groups are competitors, in reality they are a free way to promote ESL Job Map.

### **Other Players**

For a summary of other important players in the market, please see [Appendix B](#) Other Players of Note.

### **Will large outside companies move into this market?**

We don't think so. English job boards will not be absorbed into larger job matching systems because of structural dis-similarities with the larger job market, and big tech won't create a separate solution because the market is too niche. For a more detailed analysis of these two points, and discussion of other ways the broader industry might be affected by big tech, please consult [Appendix C](#).