

UK ELT: Status quo, trends and future



Samuel Vetrak, CEO, StudentMarketing

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ABOUT US | OUR APPROACH



STUDENTMARKETING IS A UNITED NATIONS WORLD TOURISM ORGANIZATION AFFILIATE MEMBER.



AS AN ESOMAR MEMBER, I COMPLY WITH THE ICC/ESOMAR INTERNATIONAL CODE ON MARKET AND SOCIAL RESEARCH AND ESOMAR WORLD RESEARCH GUIDELINES.

SAMUEL VETRAK, CEO, STUDENTMARKETING

ABOUT US | OUR INDUSTRY EXPERTISE



ABOUT US | OUR CLIENTS

DESTINATIONS



Australian Government
Australian Trade Commission



ASSOCIATIONS



PROVIDERS

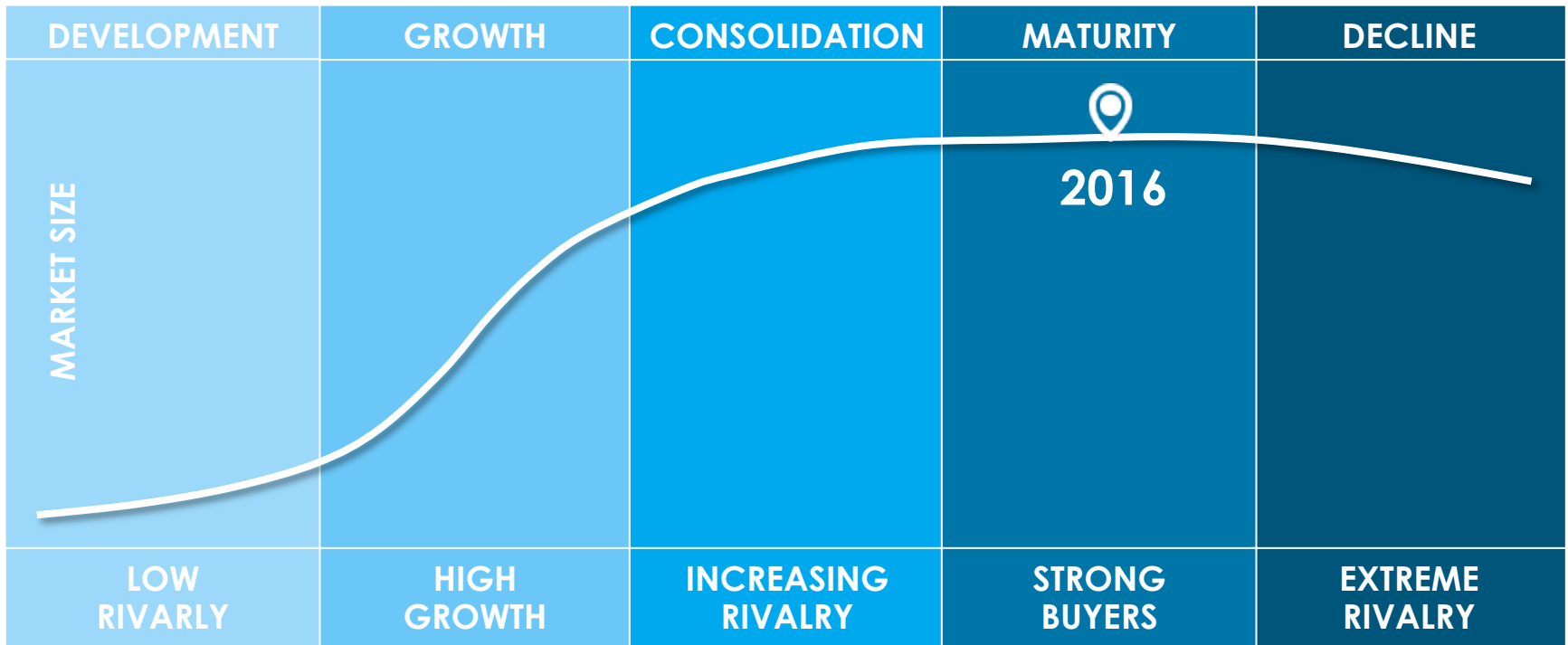


PART 1

PART 1

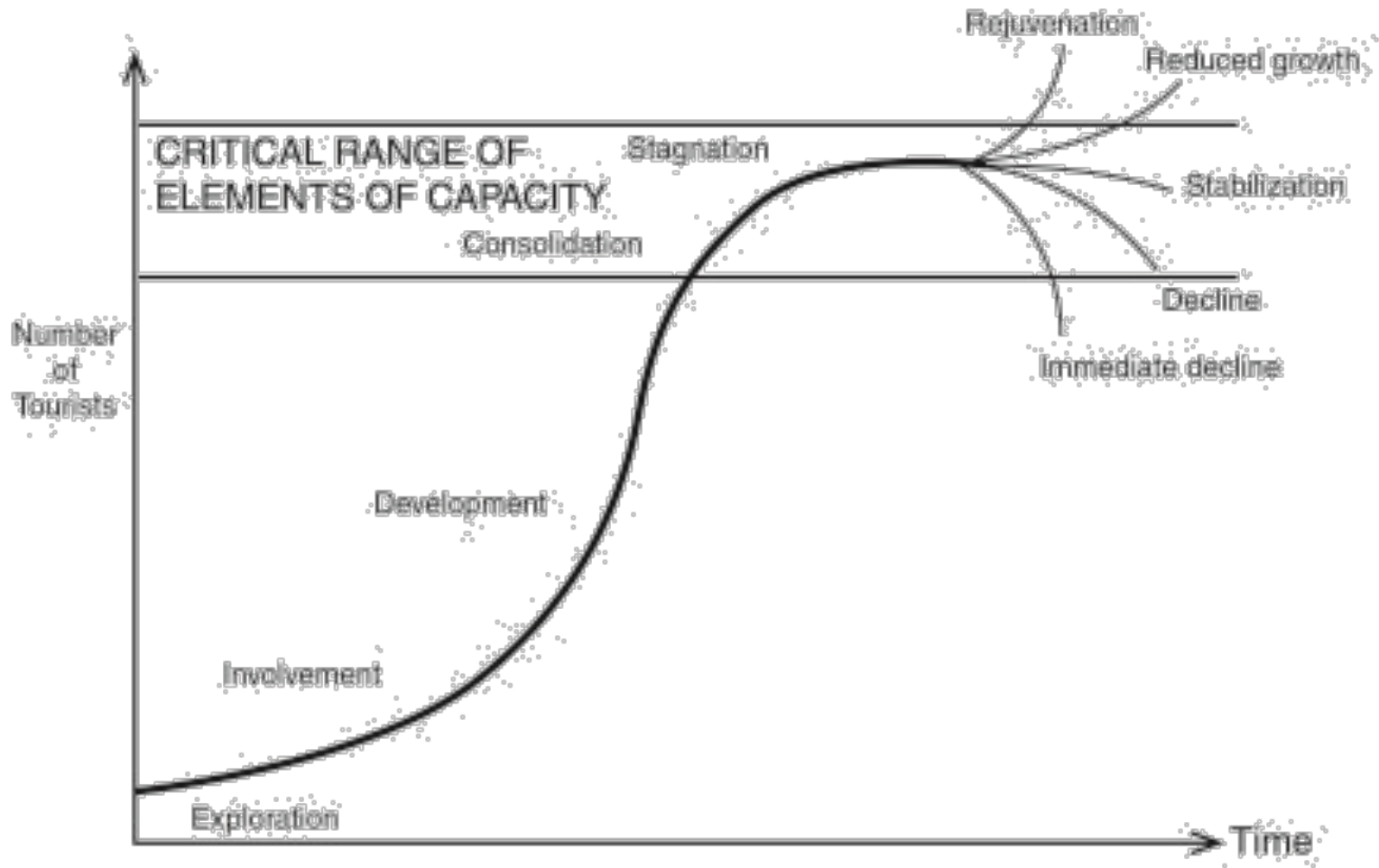
MARKET OVERVIEW

GLOBAL ELT | DEVELOPMENT STAGES



Source: StudentMarketing, 2016

GLOBAL ELT | FUTURE DEVELOPMENT



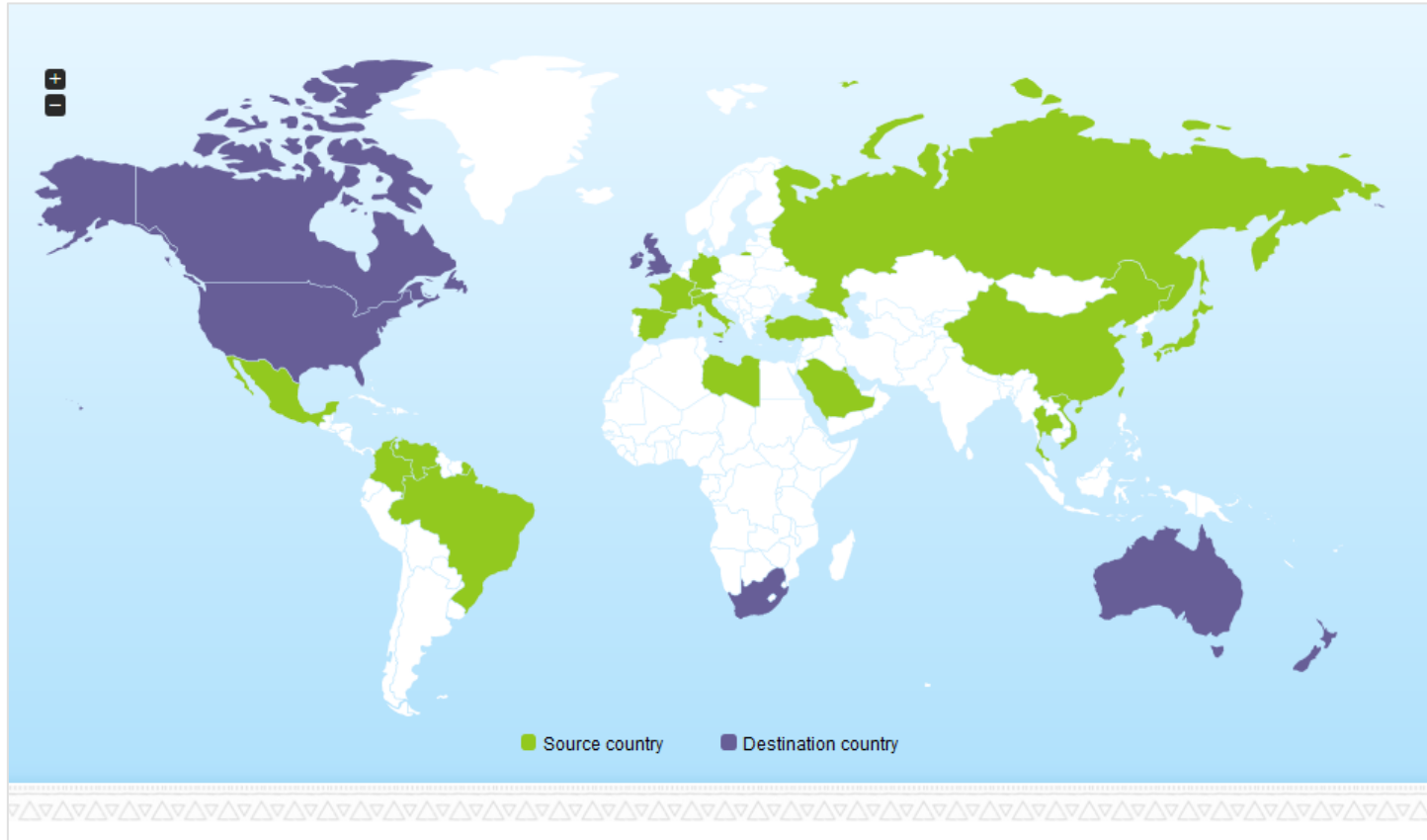
Source: Butler, 1980

GLOBAL ELT | GEOGRAPHICAL DISTRIBUTION OF ELT CENTRES



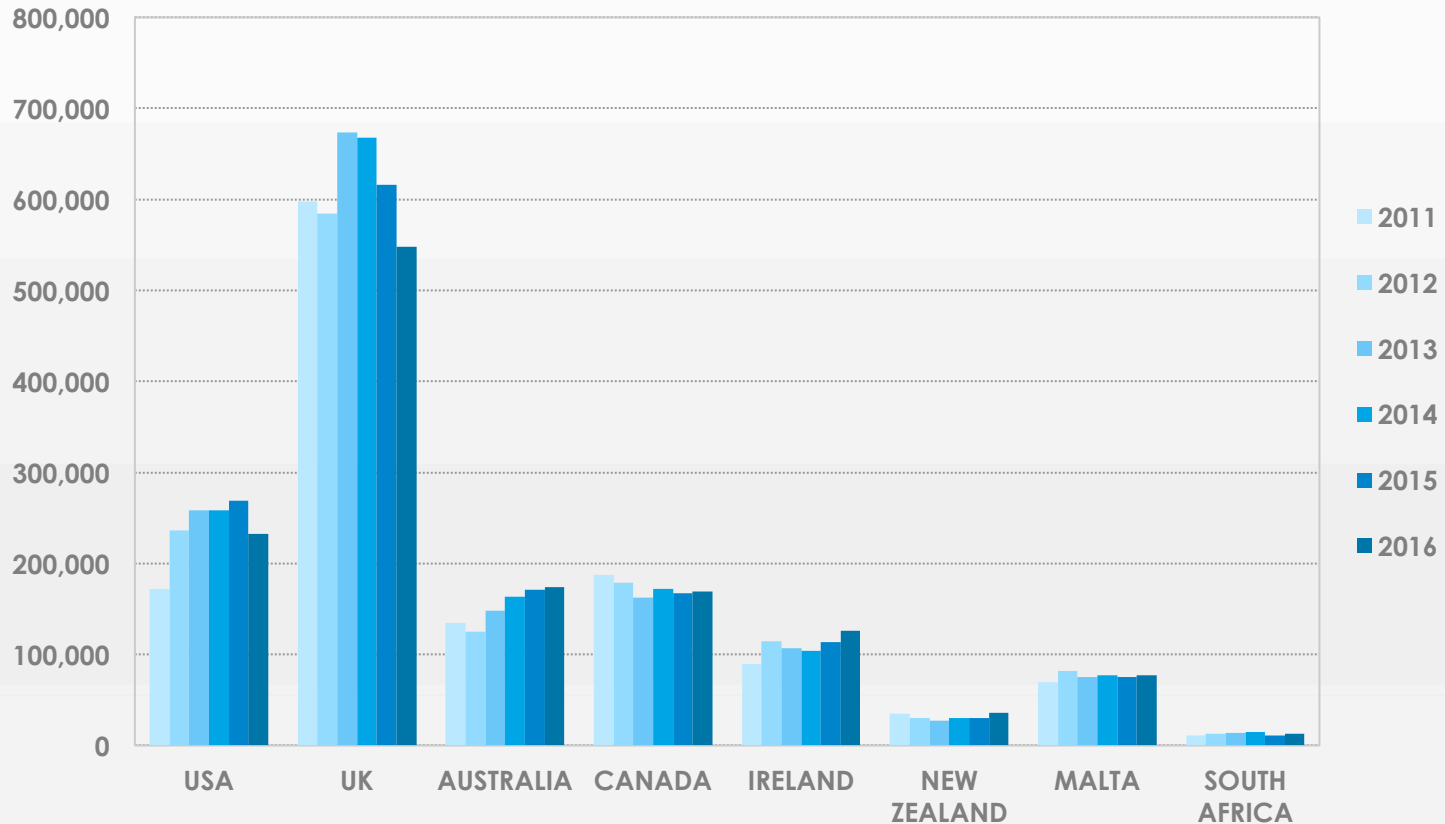
Source: StudentMarketing, 2017

GLOBAL ELT | WORLDWIDE DEMAND MAP



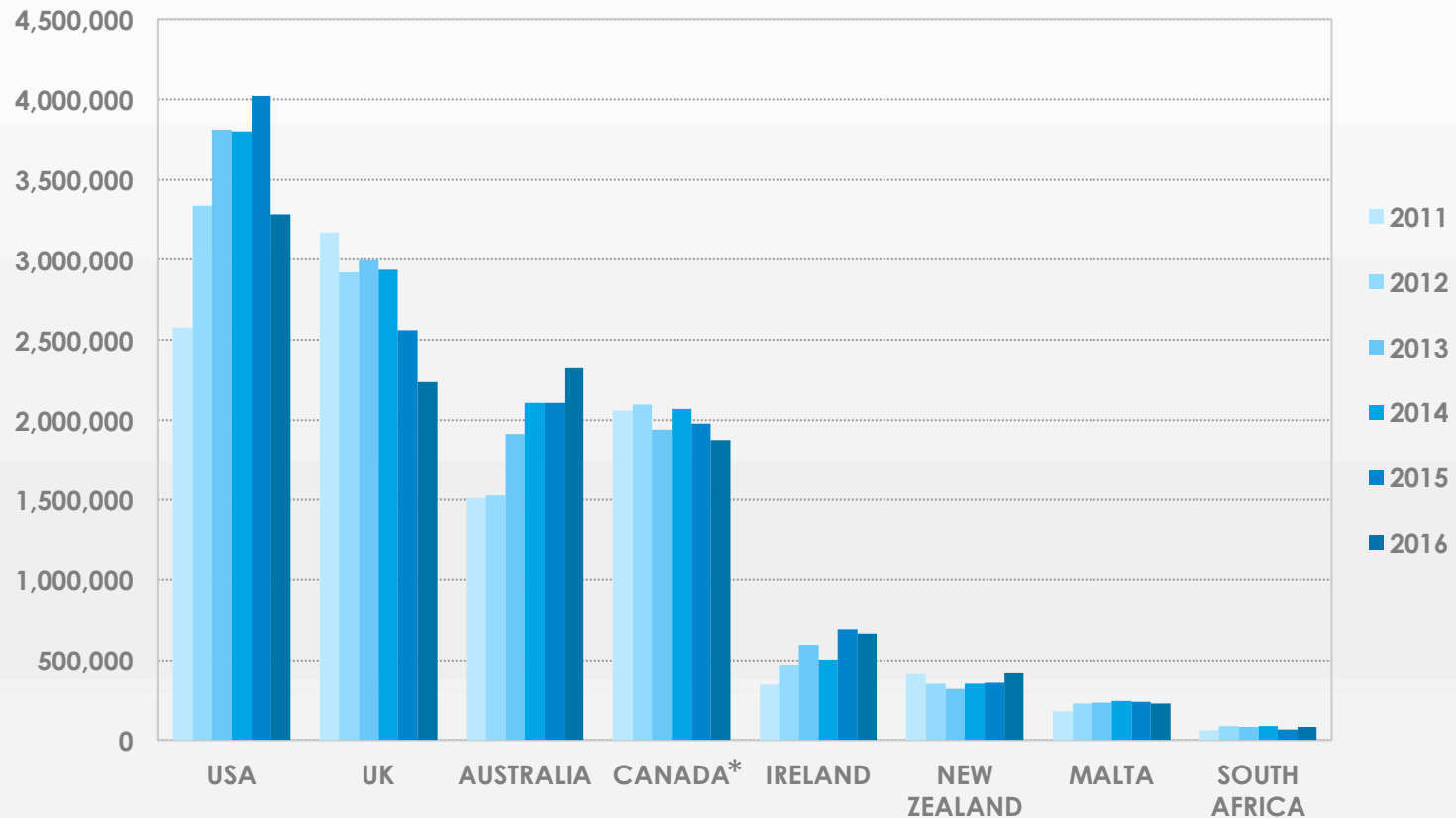
Source: StudentMarketing, 2017

GLOBAL ELT | TOP DESTINATIONS (STUDENT NUMBERS)



Source: StudentMarketing, 2017

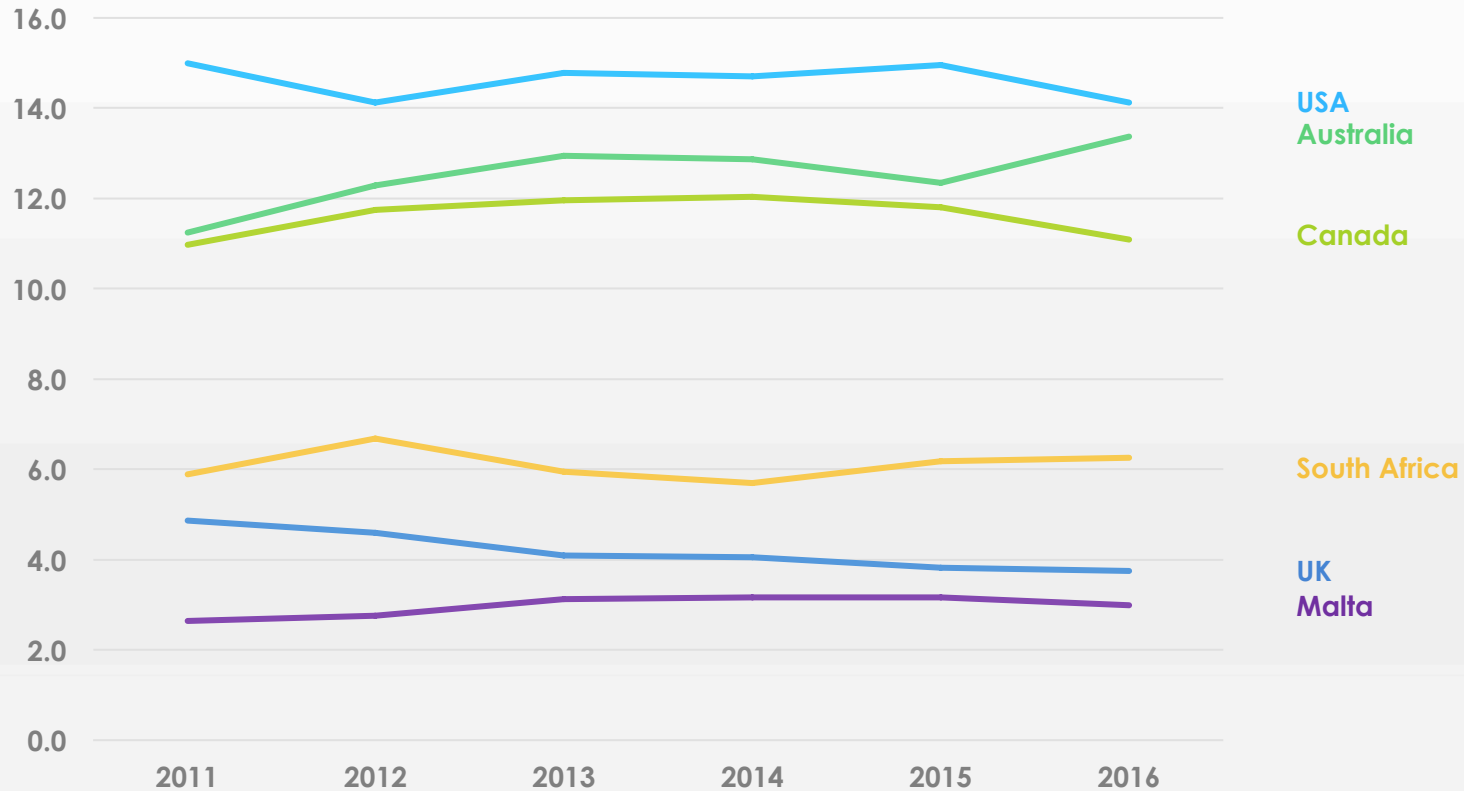
GLOBAL ELT | TOP DESTINATIONS (STUDENT WEEKS)



Source: StudentMarketing, 2017

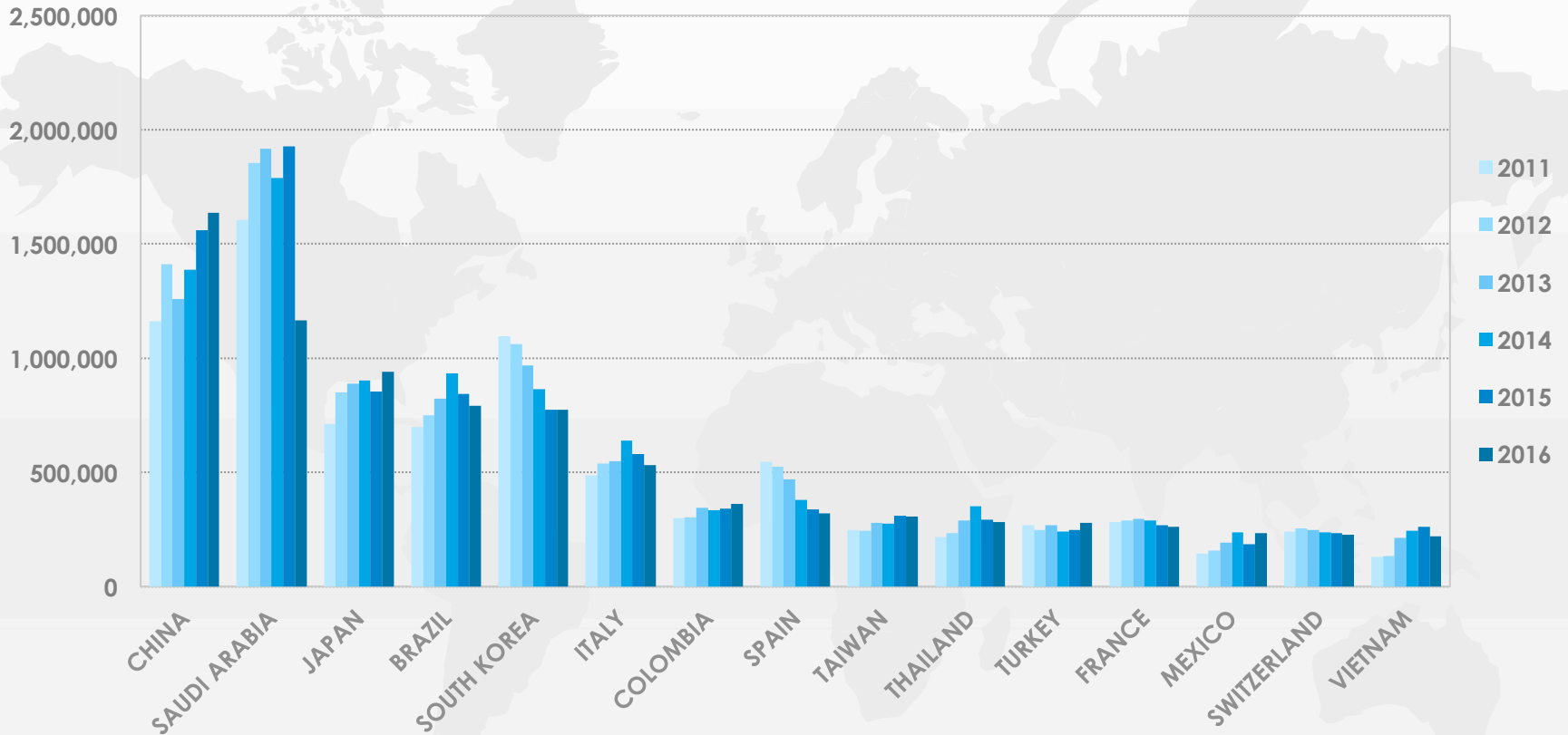
*Figure is an estimate

GLOBAL ELT | AVERAGE LENGTH OF STAY (WEEKS)



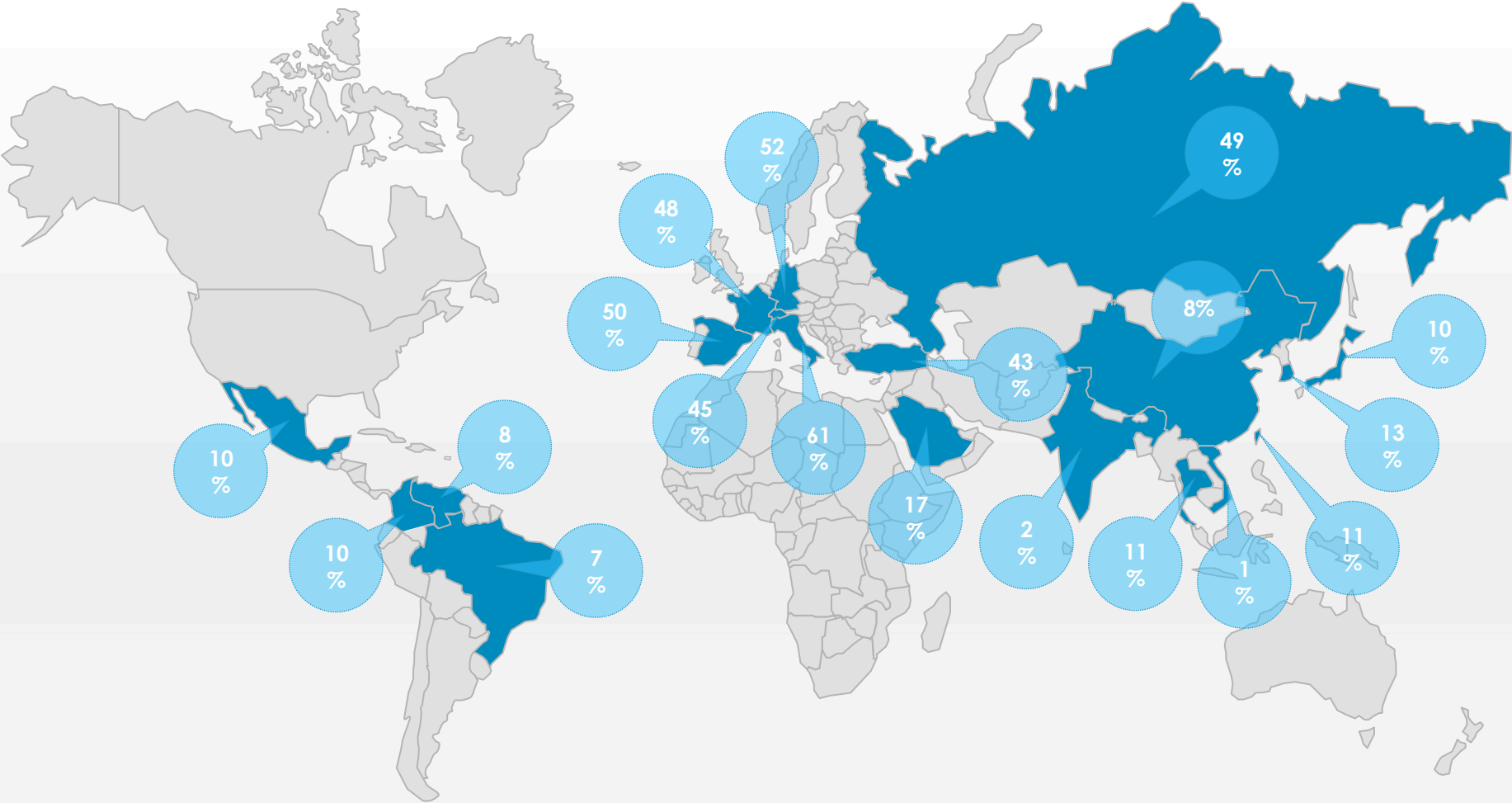
Source: English UK, 2017; Languages Canada, 2017; EduSA, 2017; NSO Malta, 2017; IIE, 2017; English Australia, 2017

GLOBAL ELT | TOP SOURCE MARKETS (STUDENT WEEKS)



Source: StudentMarketing, 2017; 2015 data on China is an estimate

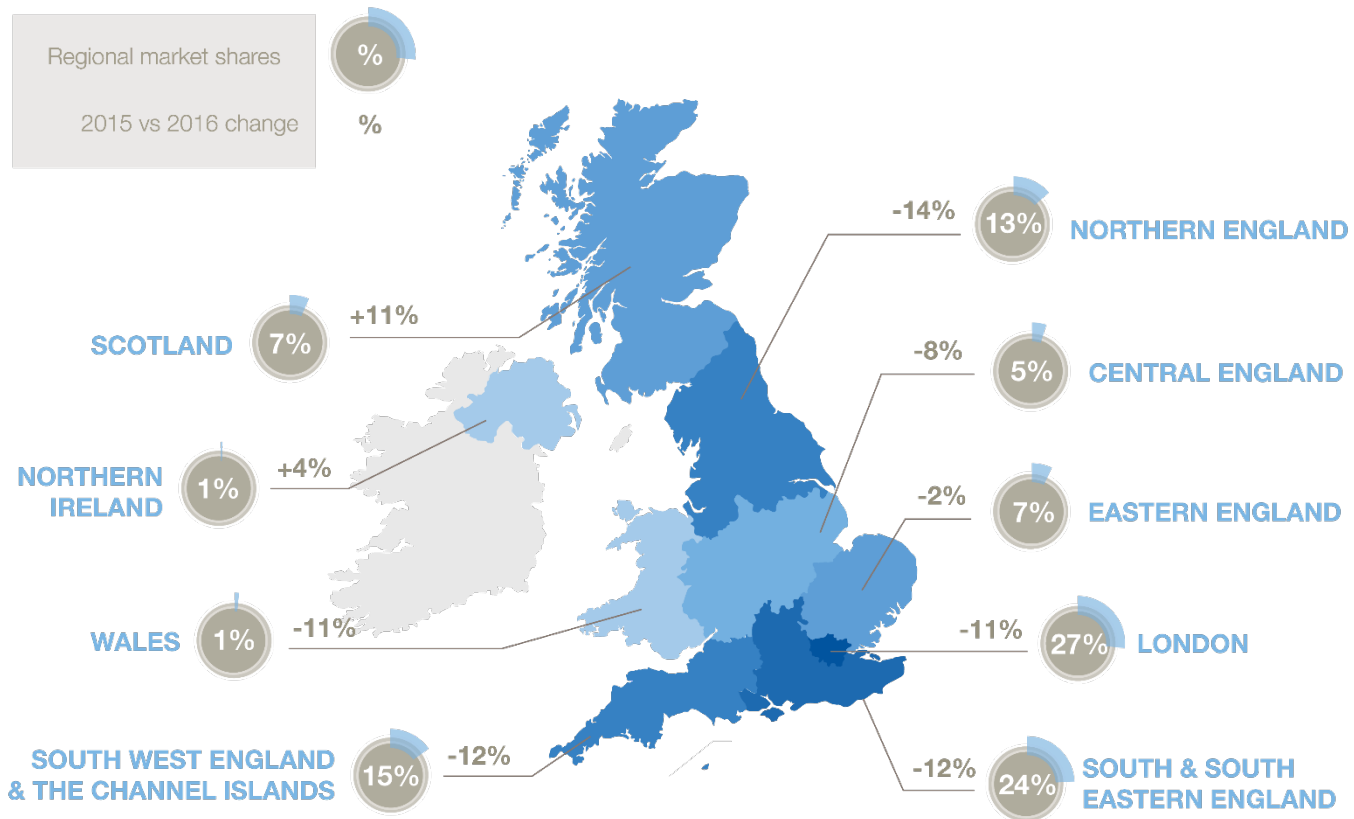
UK ELT | UK'S SHARE IN TOP MARKETS (STUDENT WEEKS)



Source: StudentMarketing, 2017

UK ELT | REGIONAL SHARES (STUDENT WEEKS)

Regional market share 2015 vs. 2016 change in student weeks



Source: English UK, 2015 - 2016

UK ELT | QUARTERLY DATA ANALYSIS

ENGLISHUK 

QUIC QUARTERLY
INTELLIGENCE
COHORT

Features

- Data by age group and source market
- Data by booking source and source market
- Programme data by source market
- Regional analysis

To come

- Historical comparisons on a quarterly basis

UK ELT | QUARTERLY DATA ANALYSIS

ENGLISHUK

QUIC QUARTERLY INTELLIGENCE COHORT

124 participating centres

	Q1 Results	Q2 Results	Q3 Results
Student weeks	150,648	176,599	365,759
Adult vs. Junior student weeks	91% : 9%	89% : 11%	70% : 30%
Commissionable vs. Non-commissionable student weeks	75% : 25%	75% : 25%	72% : 28%
Student weeks by programme type			

Source: English UK, 2017

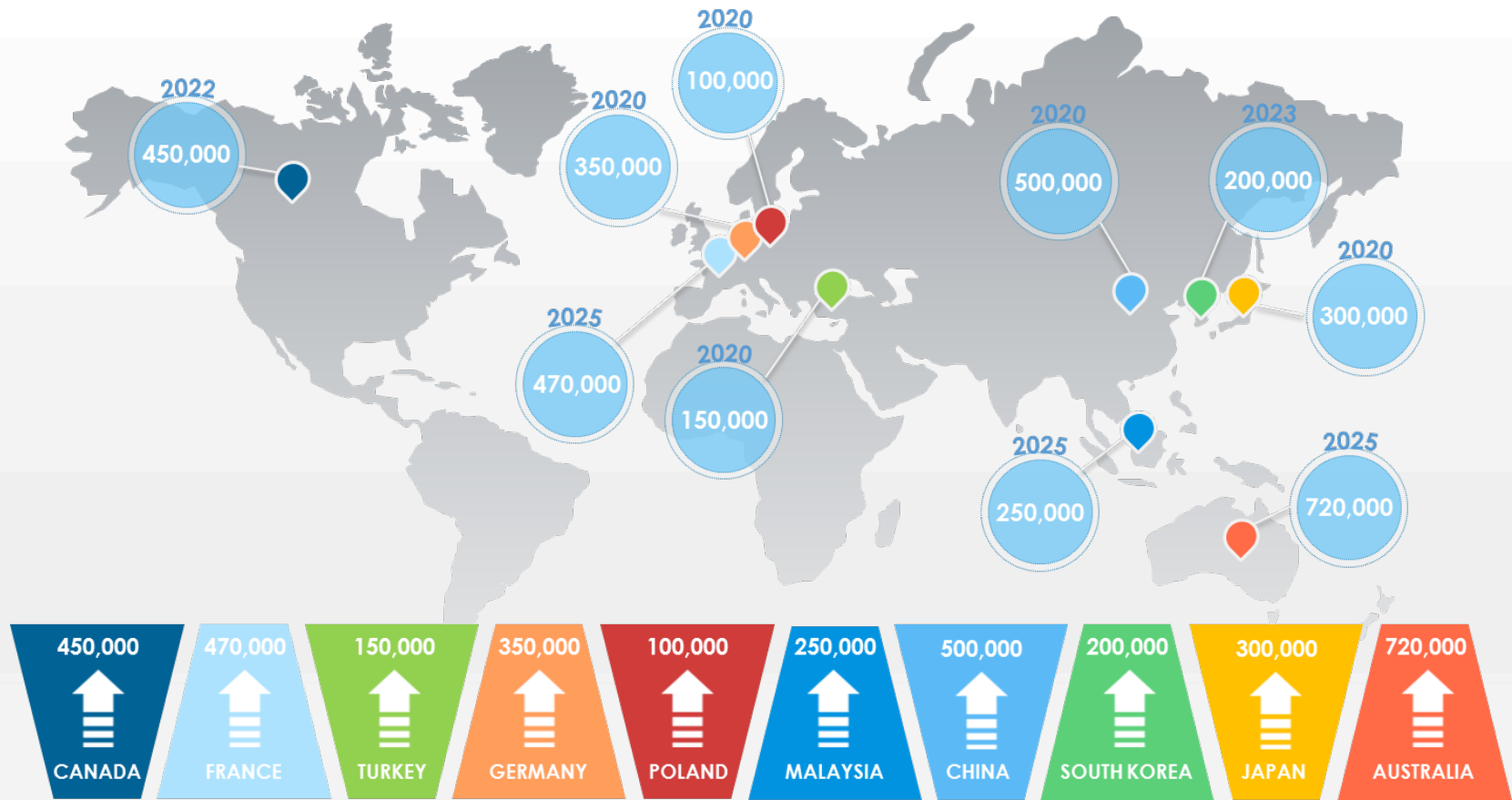
PART 2

PART 2

GLOBAL SITUATION



INTERNATIONALISATION | INTL STUDENT RECRUITMENT TARGETS



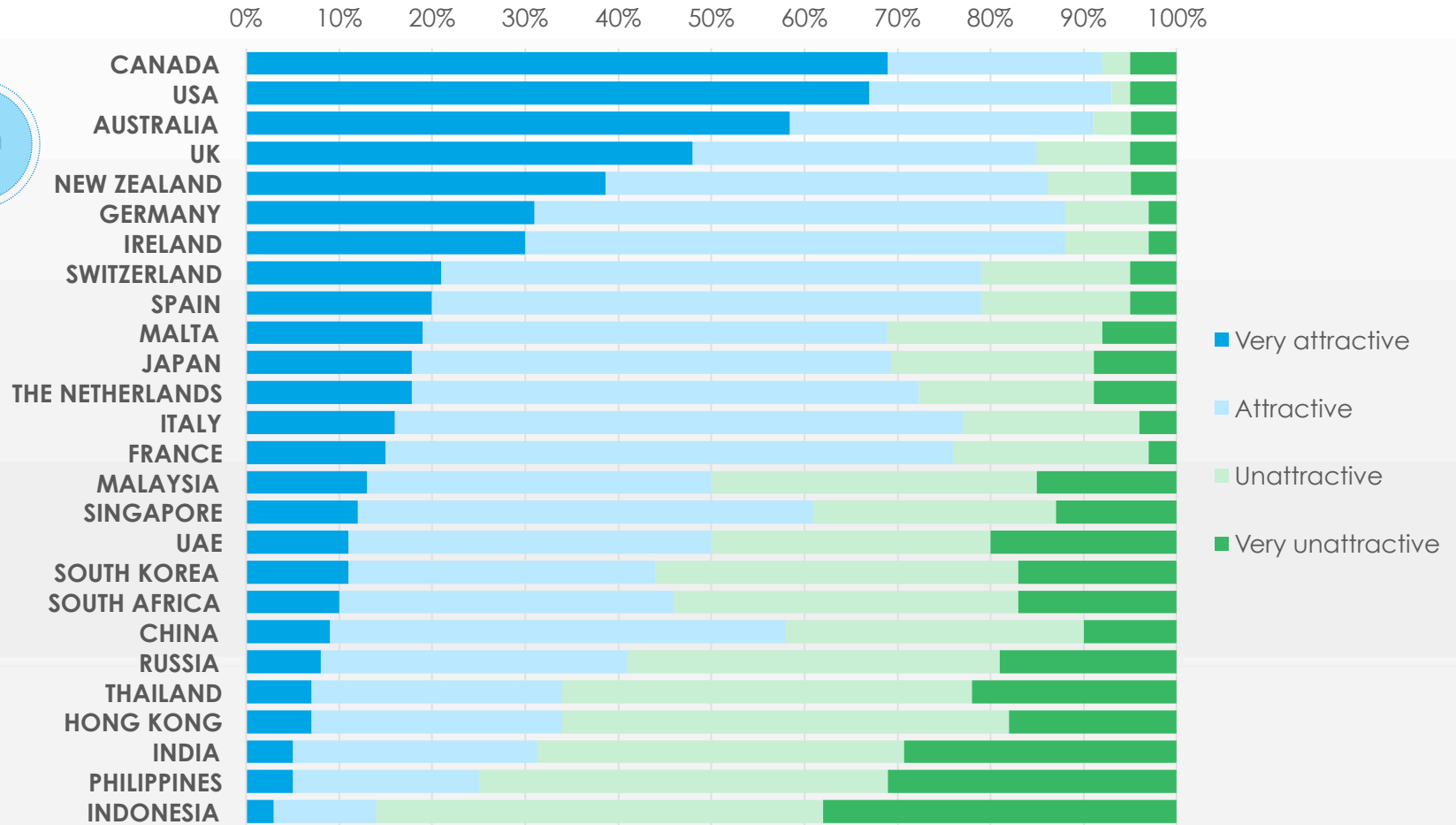
Source: Government of Canada, 2015; Campus France, 2014; Ministry of Science and Higher Education Poland, 2015; International Relations Office Turkey, 2014; DAAD Germany, 2014; Ministry of Education China, 2011; Ministry of Education Malaysia, 2015; Ministry of Education, Republic of Korea, 2015; The Government of Japan, 2013; Australian Education International, 2017

MARKETING ACTIVITIES | GLOBAL

- Eased visa policies and entry requirements in destinations
- Systematic and strategic destination promotion
- Introduction of post-study work schemes
- Frequent visits to source countries
- Joint marketing
- Innovations

DESTINATION POPULARITY | RATING BY AGENTS

4th



Source: ICEF i-graduate Agent Barometer, 2016

PART 3



PART 3

TRENDS

2017 IN REVIEW

1

Academic programs are growing

Higher education

4,500,000



K-12

200,000



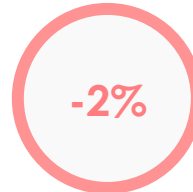
2017 IN REVIEW

2

ELT is shrinking

GLOBAL ELT MARKET
STUDENT WEEKS

2015 vs
2014



2016 vs
2015



2017 vs
2016

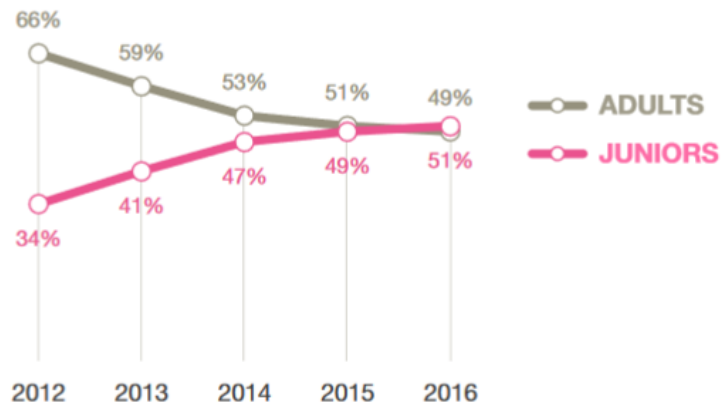


Source: StudentMarketing, 2017

2017 IN REVIEW

3

Students becoming younger



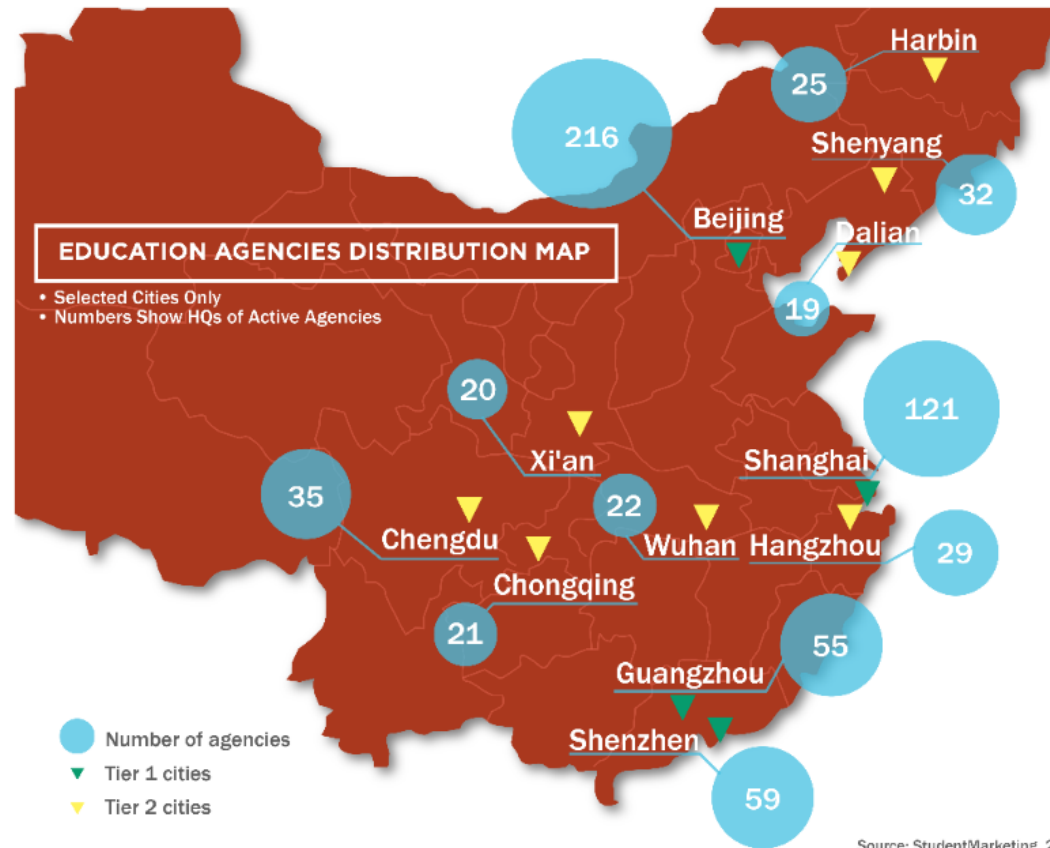
2017 IN REVIEW



Source: StudentMarketing, 2017

4 Oversupply

2017 IN REVIEW



Source: StudentMarketing, 2016

5 China

2017 IN REVIEW

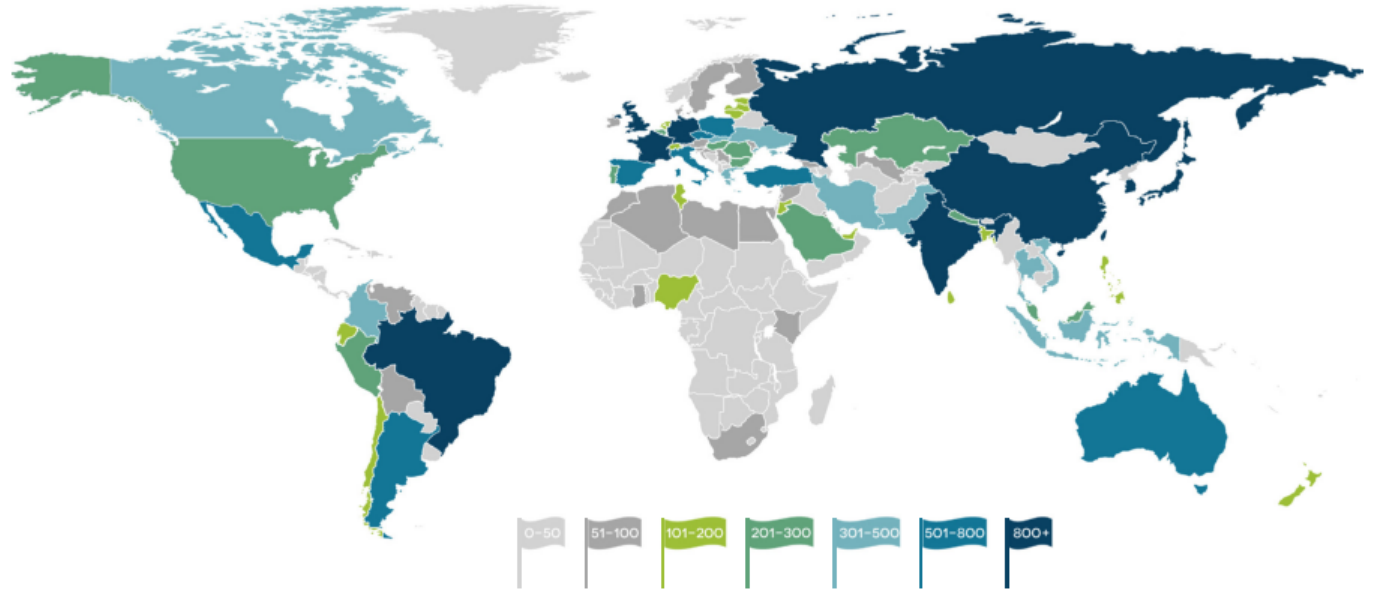


Use of agents



STAYS OR GROWS, ESPECIALLY IN HE

2017 IN REVIEW



Source: StudentMarketing, 2016

7

Deregulation over regulation

2017 IN REVIEW

8



DESTINATIONS

ASSOCIATIONS

PROVIDERS

More demand for data

FEATURED NZ International Education Snapshot 2017 - The 2016 full year student numbers, by market, NZ region...

Home Secretary to ask Migration Advisory Committee to complete detailed study of impact of international students in the UK.



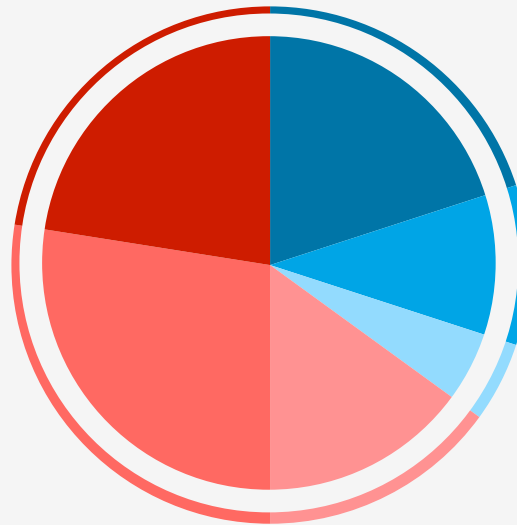
The government will today [commission its independent advisers on migration to complete a detailed assessment of the social and economic impact of international students in the UK.](#)

The commission is part of a series of publications coming out today which will feed into a robust and comprehensive evidence base on the impact of international students.

Alongside the commission, the UK's first publication of exit checks data will provide a comprehensive account of the compliance of international students. In addition, the Office of National Statistics is releasing a report as part of its ongoing programme of work looking at the impact of students on net migration.

2017 IN REVIEW

PERFORMANCE OF 40 TOP SOURCE COUNTRIES IN ELT (2014 vs 2016)



- Increase of 20% and more
- Increase of 10%-19.9%
- Increase of 1%-9.9%
- Decrease of 1%-9.9%
- Decrease of 10%-19.9%
- Decrease of 20% and more

Source: StudentMarketing, 2017; measured in student weeks

80d

Source countries

2017 IN REVIEW

8b

Sales team



REMOTE
MANAGEMENT



FREQUENT
TRAVEL

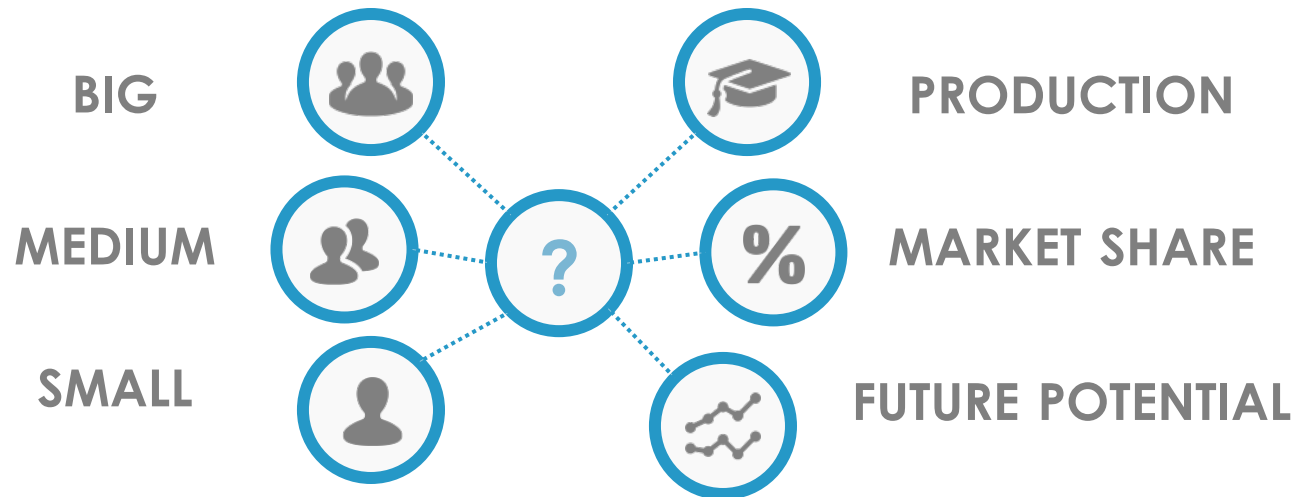


LOCAL
PRESENCE

2017 IN REVIEW



Agent network



2017 IN REVIEW



Joint marketing activities



2017 LANGUAGES CANADA TRADE MISSION

2017 IN REVIEW

10

Individual marketing



MOST PROMOTE 'WHAT', NOT 'WHY'

2017 IN REVIEW



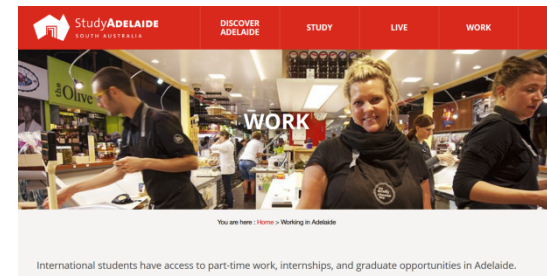
FUSION
powered by ec

VIRTUAL TOUR



11

Innovations



2017 IN REVIEW

12

Lack of repeated business



UPSELL
TECHNIQUES

SECOND-GENERATION
REPEATED BUSINESS

REFERENTIAL BUSINESS
(BRAND AMBASSADORS)

2017 IN REVIEW



2017 IN REVIEW



BRITISH STUDY CENTRES
School of English

Experience 
English

THE
ENGLISH
STUDIO
LANGUAGE SCHOOL

14

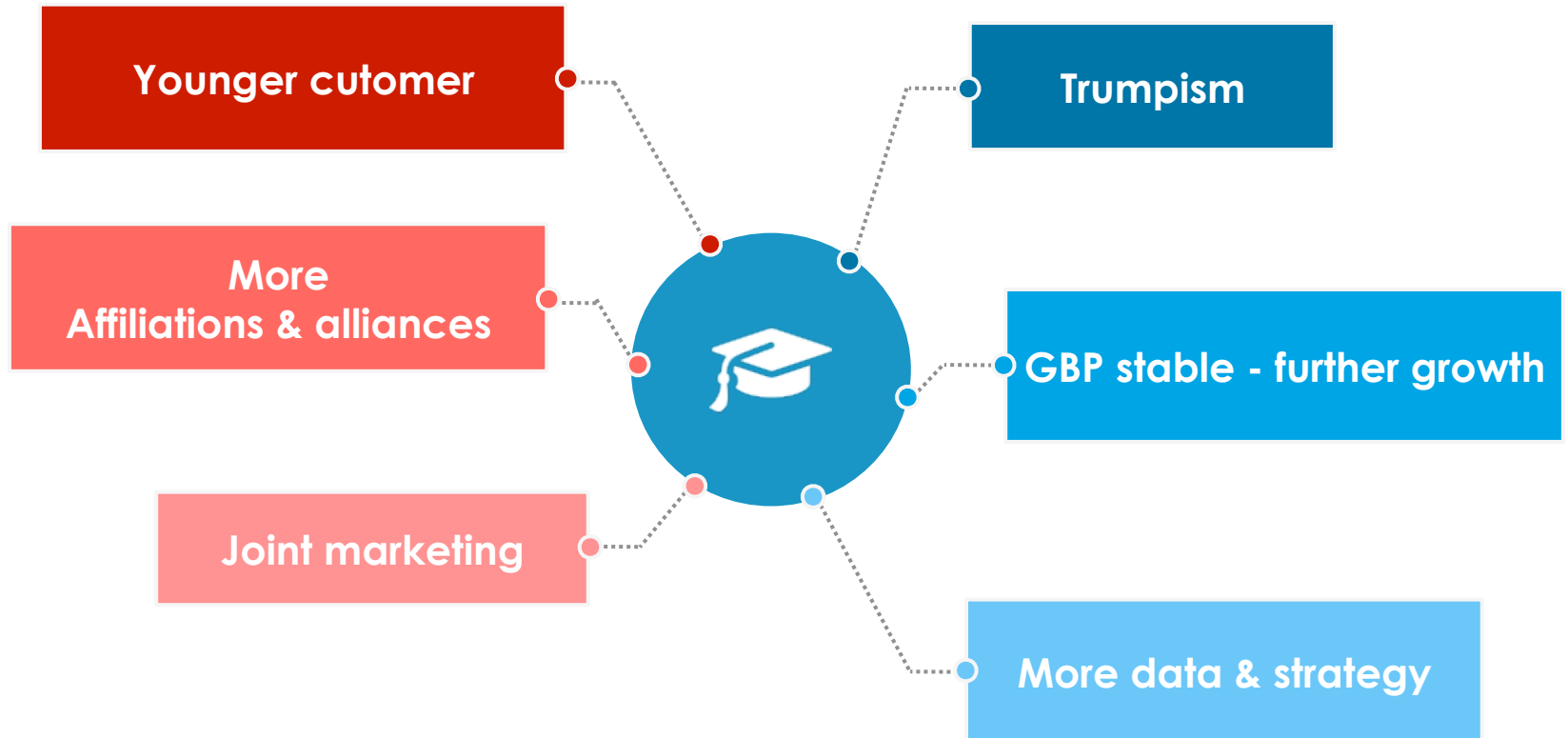
Consolidation

PART 4

PART 4

OUTLOOK


OUTLOOK FOR 2018



Thank you!



studentmarketing
YOUTH TRAVEL CONSULTANCY

 SALZTORGASSE 2, 1010 VIENNA, AUSTRIA

 +43-650-612-4527

 BUSINESS@STUDENT-MARKET.COM

 WWW.STUDENT-MARKET.COM

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ESOMAR
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