

The Market in Turkey for EFL Courses Abroad

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ATLAS PRIVATE EDUCATONAL SERVICES

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- Marketing Strategies
 - Direct recruitment
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- Marketing Activities
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Turkey at a glance

- Politics
 - Stable government
 - EU is not an anchor anymore
 - Implemented huge judicial and economical reforms
 - Secular country
- Population
 - Third highest populated country in Europe
 - 50% > under 29 years old

Turkey at a glance

- Economics
 - Booming economy -USD 230 to 736 billion of GDP
 - 6'th largest economy in Europe
 - 6'th largest trading partner of the EU
 - Total direct investment since 2003 < \$ 100 billion
- Student Mobility Position across the globe
 - #8 Greatest student origin
 - #31 Most popular student destination

Turkey at a glance

Top 5 Higher Education Destinations for Turkish students

1.	US	13045
2.	Germany	11279
3.	Azerbaijan	4010
4.	Bulgaria	3488
5.	UK	2685

* The Australian, Higher Education Special Report



Turkey EFL Education Market (Local - Private)

- 600+ private companies offering EFL programs in Turkey
- Many public and private universities also offer EFL
- 350-400 million US dollars revenue



Turkey EFL Education Market (Local - Education System)

- Public schools; 3-6 hours/week, 4th grade<
- Private schools; 8-12 hours/week, from kindergarten
- Universities with medium of instruction in English



The Fact;

“I am not aware of any other countries as ineffective as Turkey in English Language Teaching, despite significant resources allocated to the education system.”

Abdullah GUL
President of Turkish Republic
May 2011



Turkey EFL Education Market (Abroad)

UK – 11000-13000 (aprx 130,000 weeks)

USA – 5000 – 6000

Malta – 1800 – 2000

Australia – 1300 - 1500

Canada – 1300 - 1500

- The Australian, Higher Education Special Report
- UED



Marketing Strategies & Channels

- Direct recruitment
- Agency Network



Marketing Strategies & Channels

- Direct recruitment
 - Online recruitment
 - Local recruitment Office to avoid commission expenses
 - Government stakeholders
 - Ministry of National Education, Consulates
 - Council of Higher Education, Consulates
 - Public servants, Government bodies

Marketing Strategies & Channels

- Agency Network
 - Turkey is made of largely self funded students (60% family funded*)
 - Culture and behaviours; Uncertainty Avoidance
 - Family involvement with decision making
 - One stop shop
 - What student say they want and what actually happens
 - Bridging the gap between perception and reality
 - Your eyes and ears in the market
 - Measurable and effective

* i-graduate, student barometer



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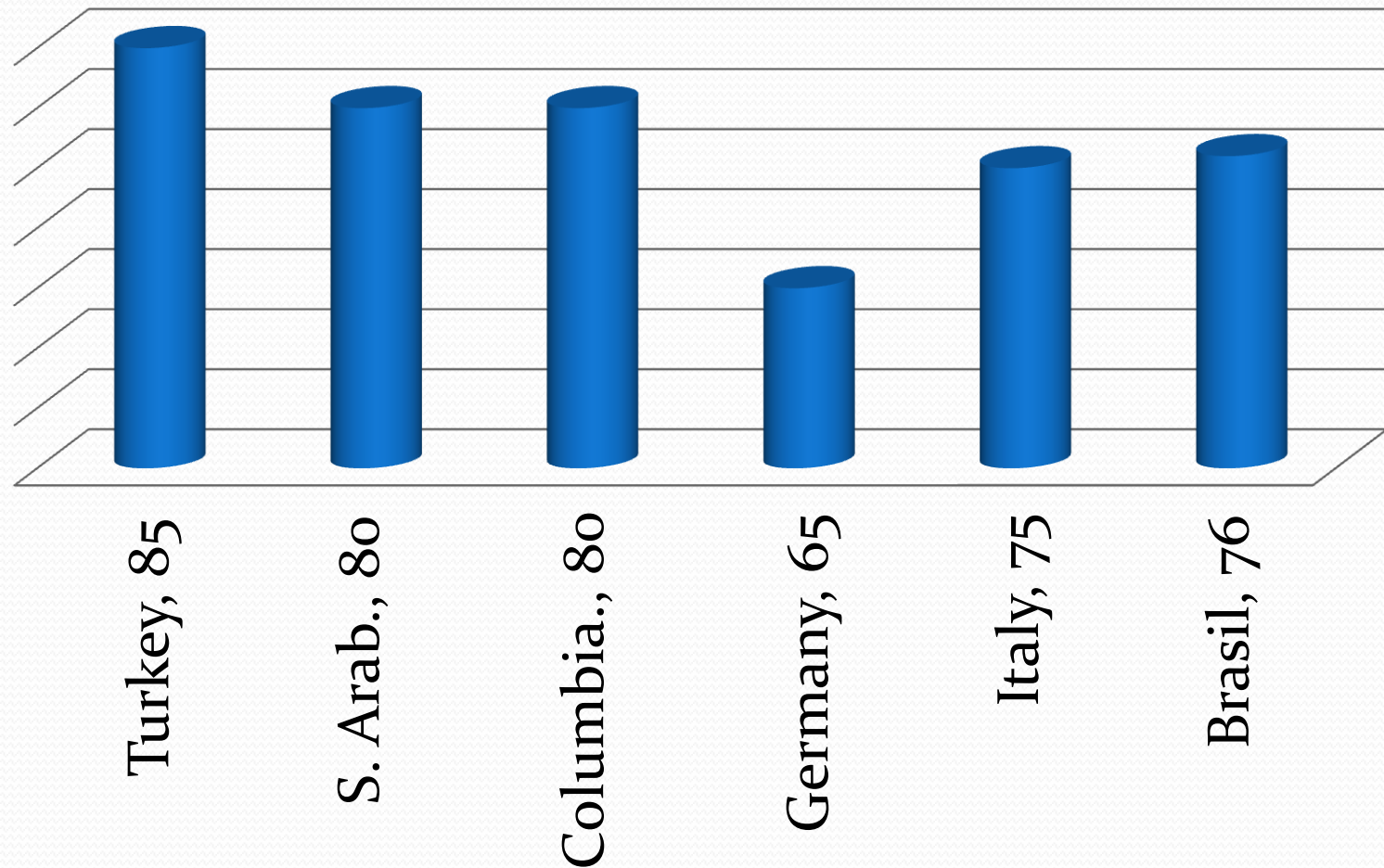
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Uncertainty Avoidance Scores



* Hofstede

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One stop shop

- School admissions
- Visa application
- Travel arrangements
 - Flight ticket
 - Airport pick up
 - Travel insurance
- Accommodation
- Student insurance
- Payments

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Marketing Strategies & Channels

- Working with Agents
 - UED
 - Managing risk with agents;
 - Payments (unfair competition)
 - Misguided students
 - Discounts from commissions

Marketing Strategies & Channels

- What Turkish agencies expect on top of commission
 - Efficient communication
 - Be flexible
 - School reputation=Agencies reputation: Partnership
 - Incentives
 - Online Agency manuals
 - Counselor training
 - Comprehensive arrival instructions



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Efficient Communication

- Single contact
- Immediate reply
- Quick turnover
- Admissions staff

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Be flexible

- Payment timing
- Cancellation fees
- Net payment
- Last minute applications
- Accommodation bookings

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Marketing Strategies & Channels

- What Turkish students expect
 - Grammar teaching
 - Modern environment
 - Individual attention
 - Not too many Turkish students in the class
 - Accommodation options
 - Central location
 - Certificate
 - Easy adaptation (mentor, orientation, extra support)
 - Talk to alumni
 - Thinks deserve higher level
 - Native teachers



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Marketing Activities

- Education Fairs (A2, IEFT, Edufairs ...)
- Student interviews
- Agency visits
- Fam trips
- Brochure, Magazine and Newspaper adds
- Advertorial
- Online marketing

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Education Fairs

- Right Fair
- Right timing
- Agency to follow up



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UK weaknesses



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- English Language Test requirement – PBS T4
- Not extendable SVV
- eSVV not available for 16-18 years old
- Universities do not package their offers with private language schools
- Too many Turkish students
- Work permit
- Climate
- Food
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UK strengths

- Distance
- High reputation
- Long history
- Wide range of options
- Perception of; Traditional = Quality
- Low visa rejection rates
- Short academic programs (UG&PG)
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Questions?

Thank you...