

2017: WHAT TO EXPECT?

MARKET DATA

AND GUIDE FOR SCHOOLS



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ENGLISH UK MARKETING CONFERENCE
FEBRUARY 3, 2017

INTRODUCTION

GLOBAL APPROACH

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STUDENTMARKETING IS A UNITED NATIONS WORLD TOURISM ORGANIZATION AFFILIATE MEMBER.



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

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ABOUT US

OUR CLIENTS

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DESTINATIONS



ASSOCIATIONS



PROVIDERS



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PART 1

MOBILITY TRENDS

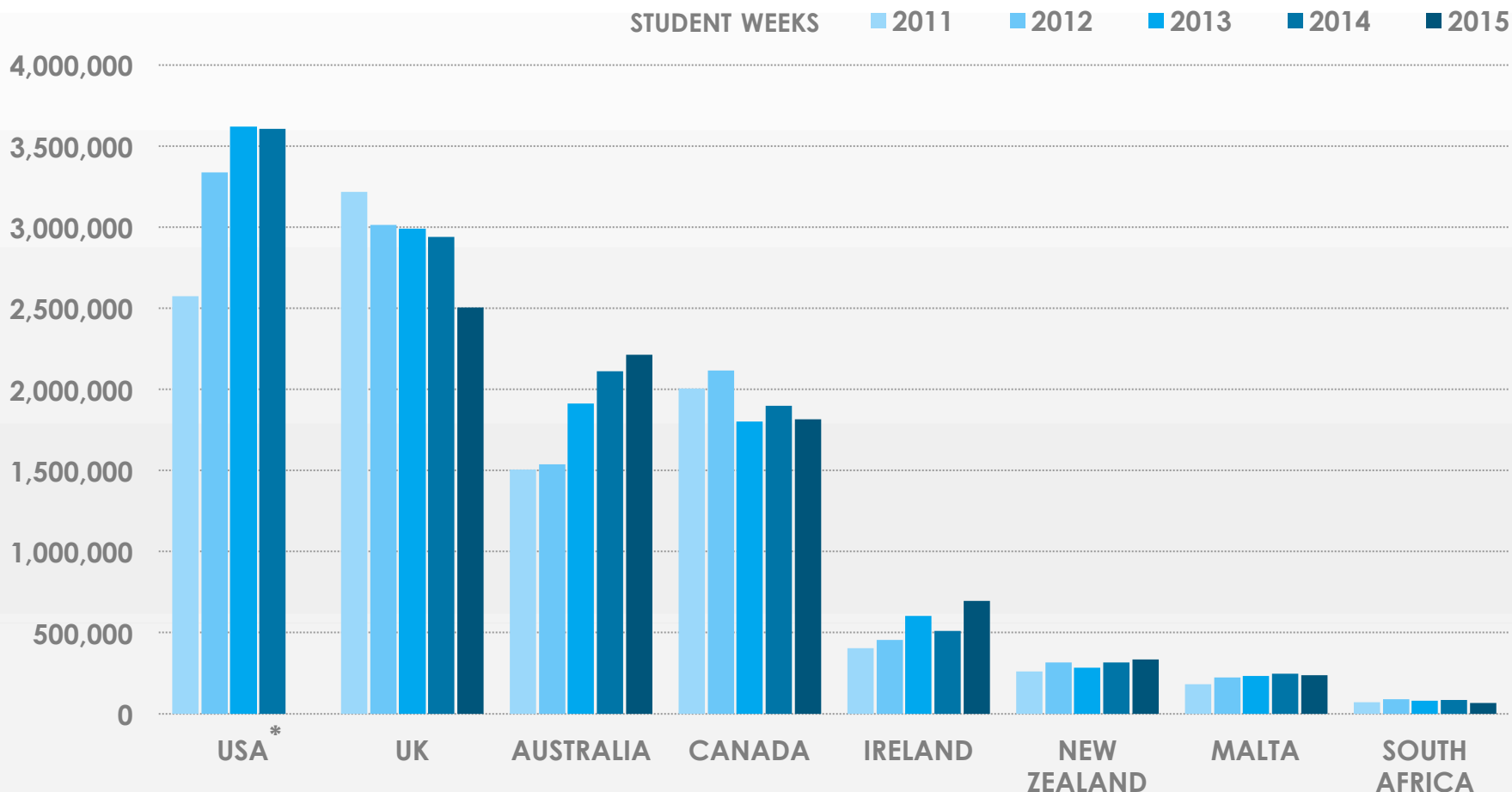


MARKET OVERVIEW

ENGLISH LANGUAGE TRAVEL – DESTINATIONS

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Source: StudentMarketing, 2016



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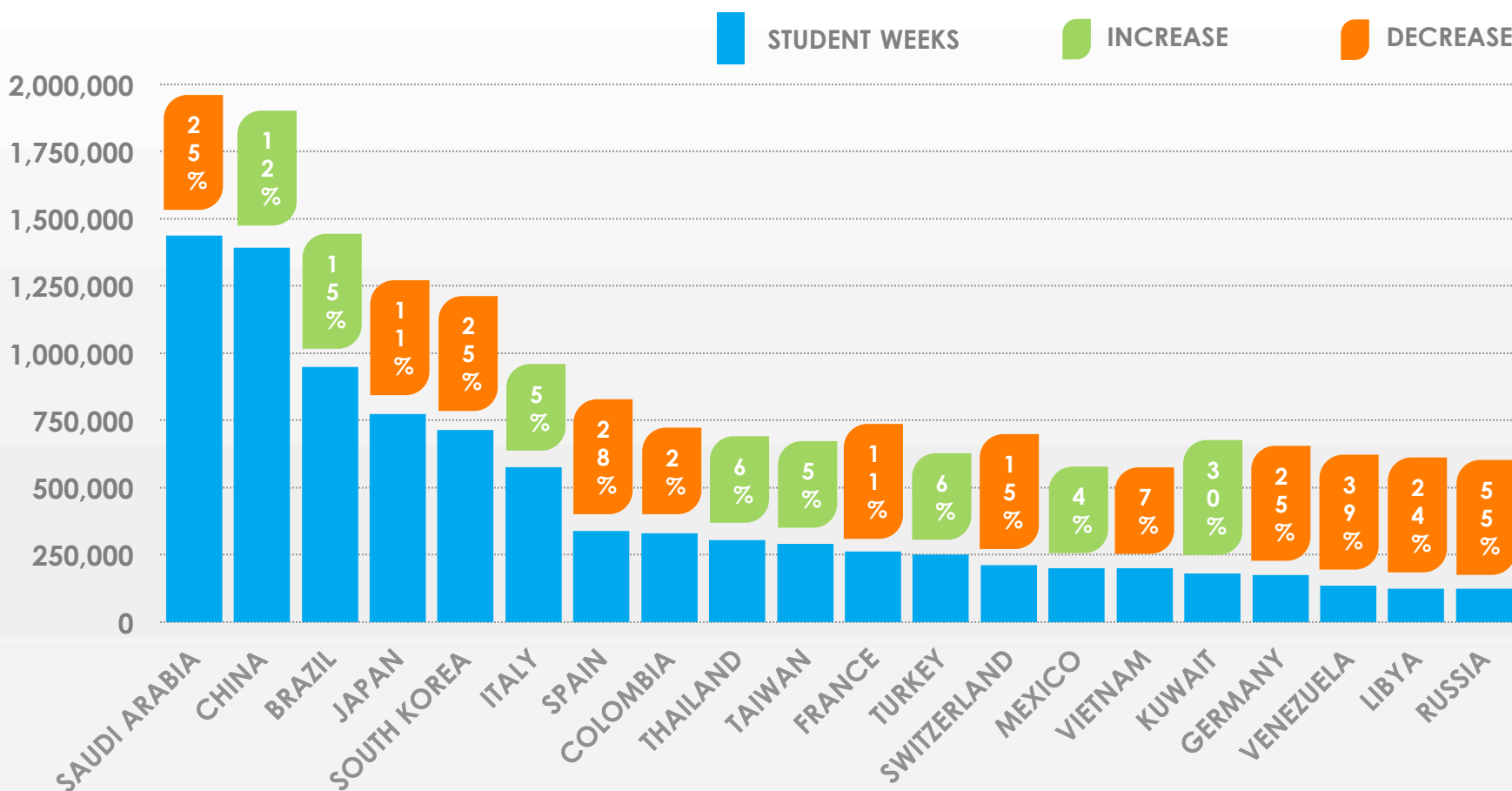
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MARKET OVERVIEW

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ENGLISH LANGUAGE TRAVEL – TOP SOURCE MARKETS & 2013 v 2015 CHANGE

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Source: StudentMarketing, 2016



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PART 2

INDUSTRY TRENDS

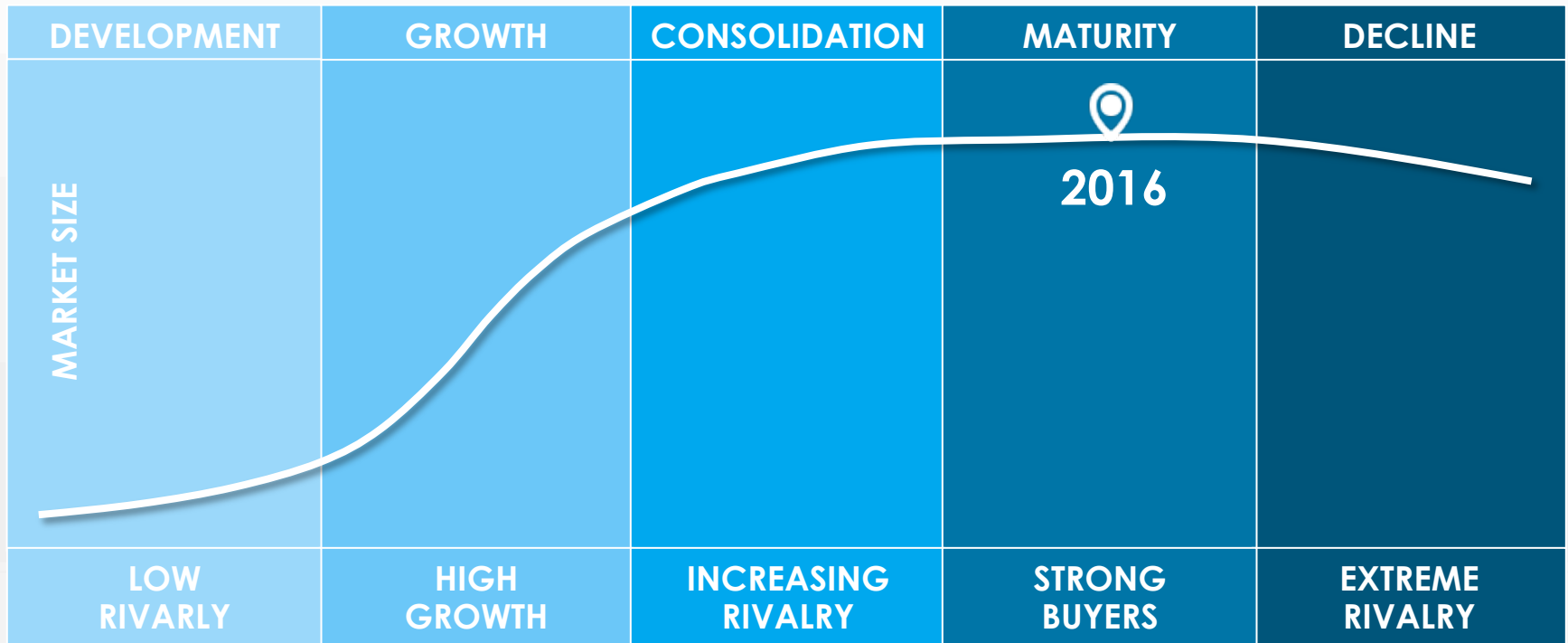


2016

YEAR IN REVIEW

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Source: StudentMarketing, 2016



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 Demand for English learning abroad is **slowing** but still growing

 While **other languages** are expected to grow

 The purpose of learning a foreign language abroad moves away from personal reasons (fun, desire to learn the language, travel component), towards **career reasons** (current or future studies, employment-related prospects)

 **More juniors**

 **More packaging**

 **More multilingual customers**

Source: IALC & StudentMarketing, 2016

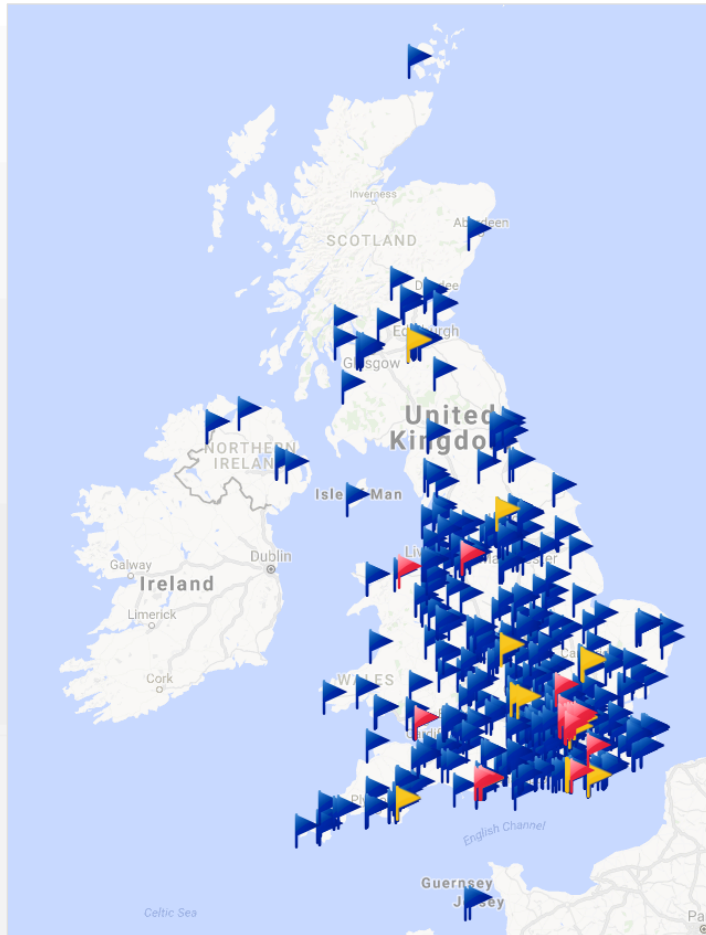



M&As AND CLOSURES

UK ELT SUPPLY

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-  LANGUAGE CENTRE
-  MERGER/ACQUISITION
-  CLOSURE

Source: StudentMarketing, 2016



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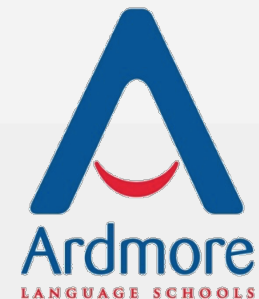


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VERTICAL INTEGRATION



≡ **ESL**



PROMOTIONAL PRICING

NET PRICE SEASONAL PRICING

SPECIAL OFFERS

HEDGING BONUSES

TACTICAL PRICING

MARKET PENETRATION PRICING



DISCOUNTS

GROSS PRICE

DYNAMIC PRICING

PSYCHOLOGICAL PRICING

COST-BASED PRICING

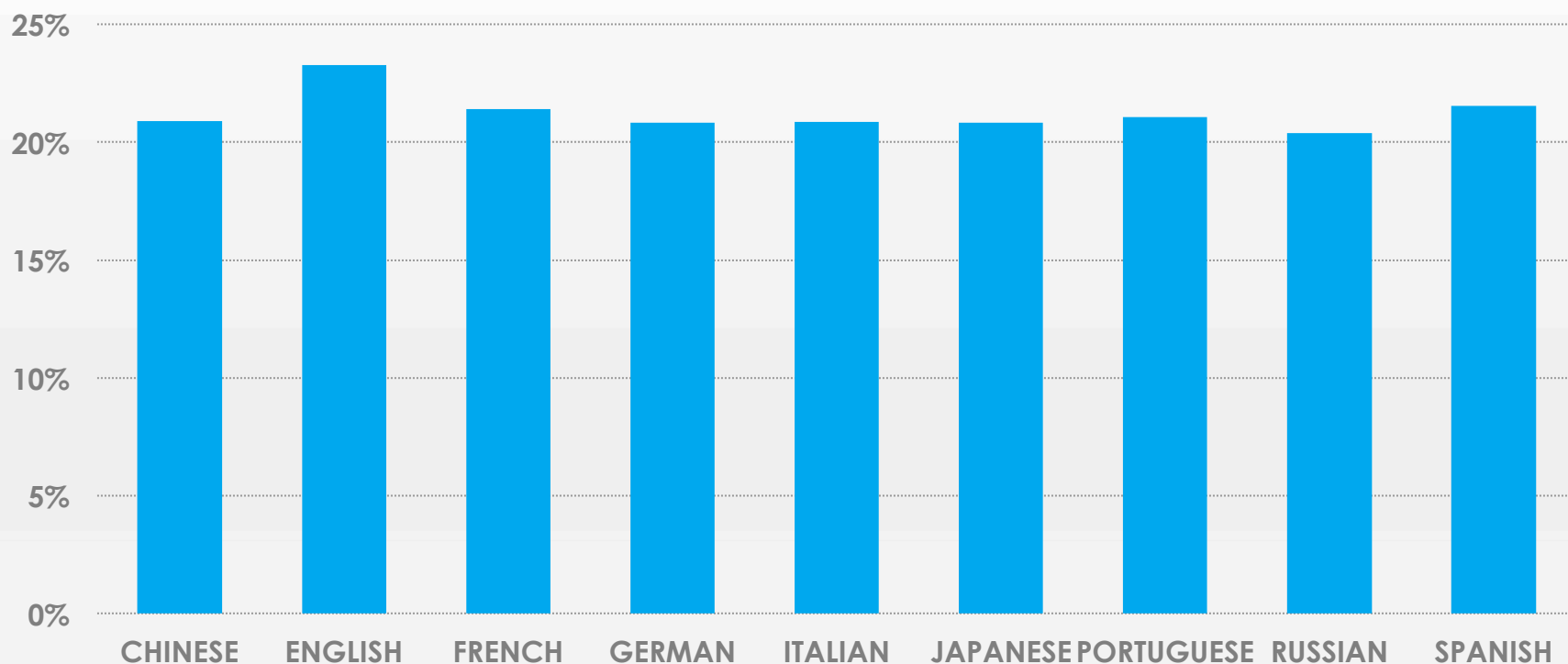
REGIONAL PRICING

COMMISSION

AVERAGE COMMISSION PER LANGUAGE IN %

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Source: IALC & StudentMarketing, 2016



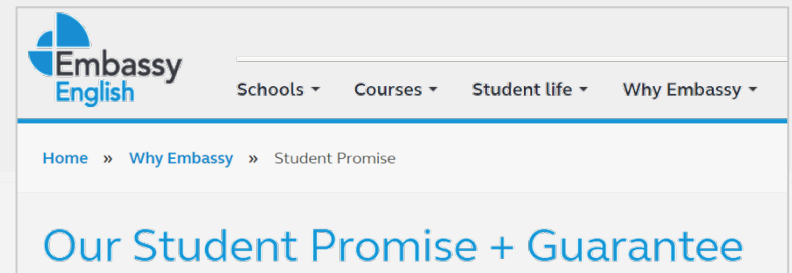
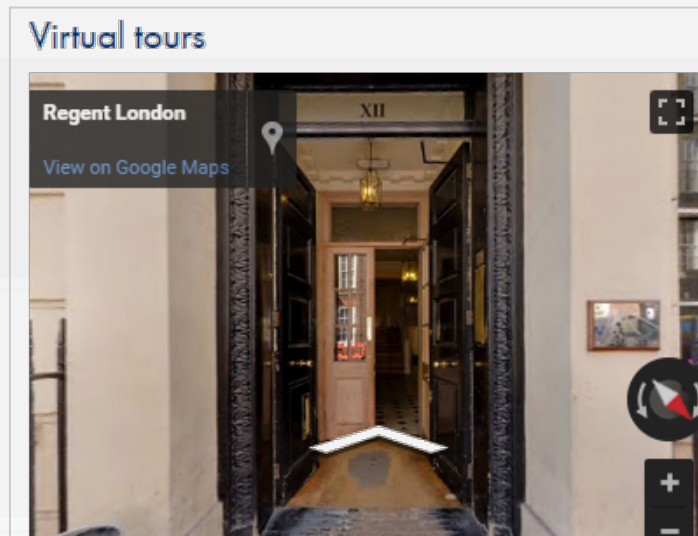
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AFFILIATIONS

IN TIMES OF MATURITY BUSINESSES - GET CLOSER

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PART 3

2017 OUTLOOK



1. Less price war (re-action)
2. More strategic solutions (proactive approach)
3. Exit of smaller players
4. M&As and portfolios
5. Packages





FAM Tours (selected agents and redistributors)



Repeated business



Social media marketing



Mobile marketing



Visual component (video)



THANK YOU!

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