



B r e x i t R e a d i n e s s S e s s i o n s :

**B u s i n e s s d e v e l o p m e n t s e s s i o n f o c u s i n g o n
d i v e r s i f y i n g t o n e w m a r k e t s**

Patrik Pavlacic, Head of Research, BONARD

BONARD

BONARD (formerly StudentMarketing) is a market intelligence and strategic development firm. We leverage our global knowledge and connections to help our clients grow in the vibrant international education market.



4
Offices

In Europe
and
China



50
Specialists

Focusing on
research,
business
solutions



282
Projects

Conducted by
our certified
experts



1,000
Meetings

With industry
stakeholders
conducted
annually



20,000
Stakeholders

Interviewed
annually



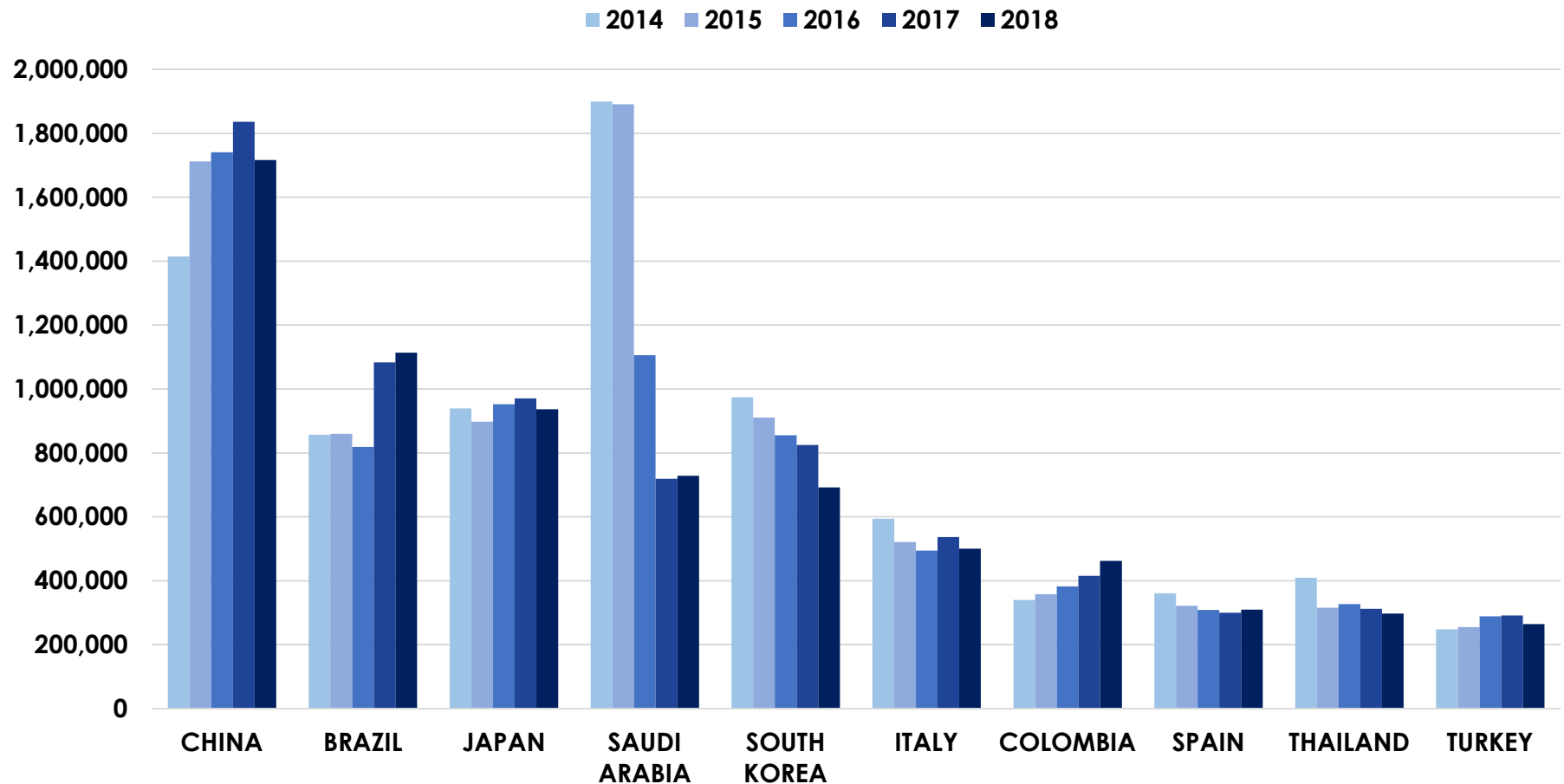
BONARD is a **United Nations World Tourism Organization Affiliate Member.**



SESSION TOPICS

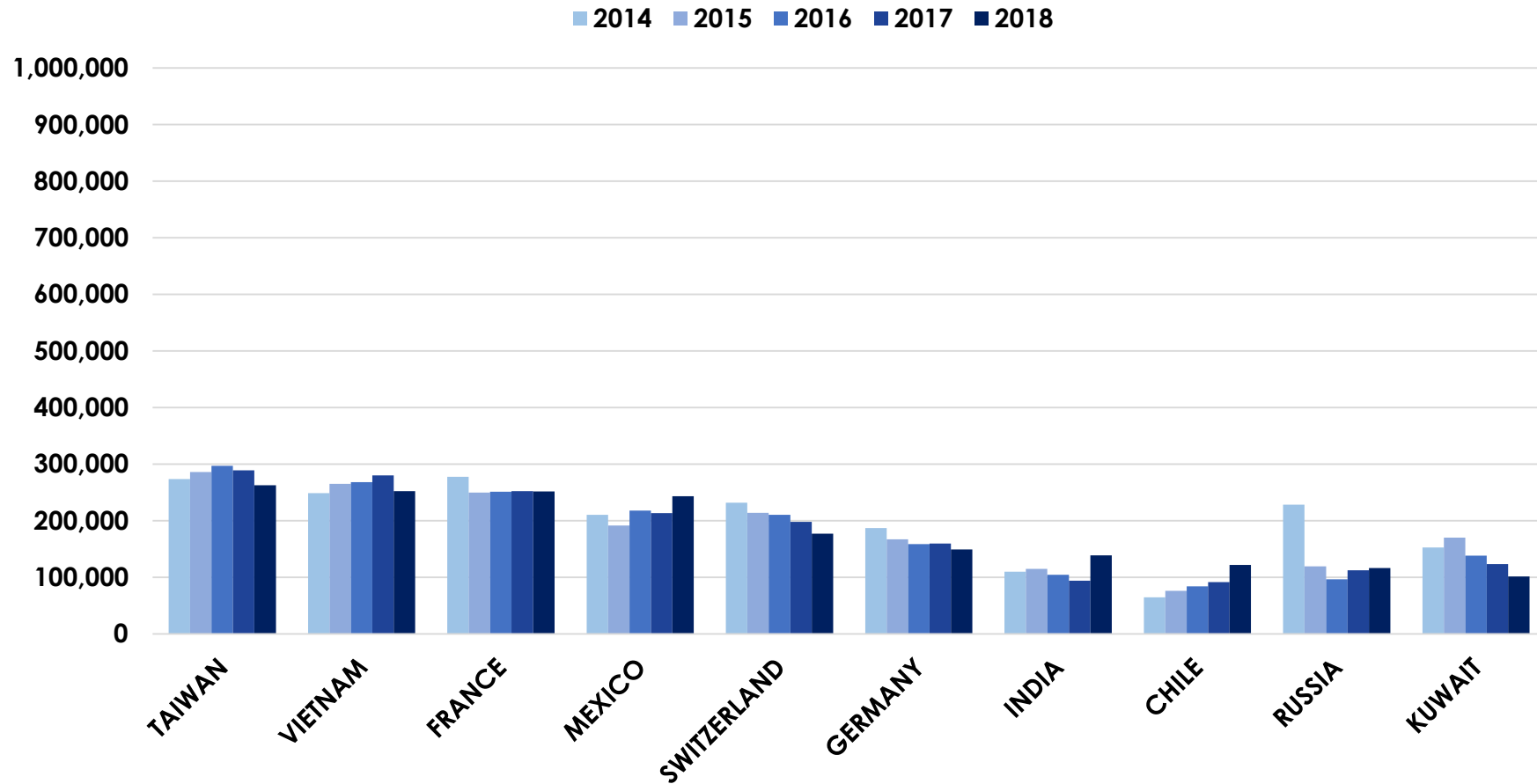
- **Global perspective**
- **UK perspective**
- **Markets of the future**
- **Industry survey on agents**
- **Summary**

GLOBAL ELT: TOP 1-10 SOURCE MARKETS (SWs)



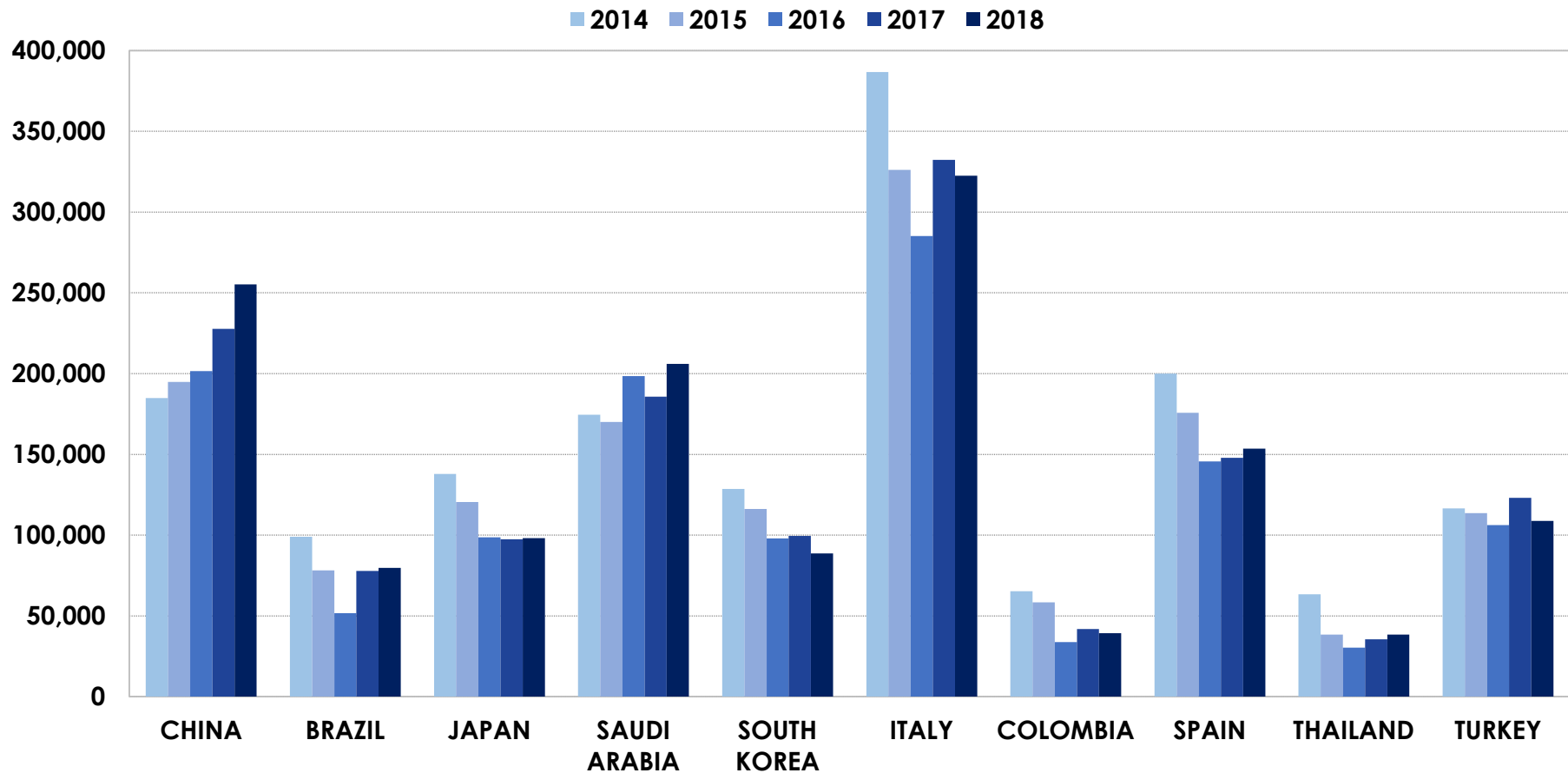
Source: BONARD, 2019

GLOBAL ELT: TOP 11-20 SOURCE MARKETS (SWs)



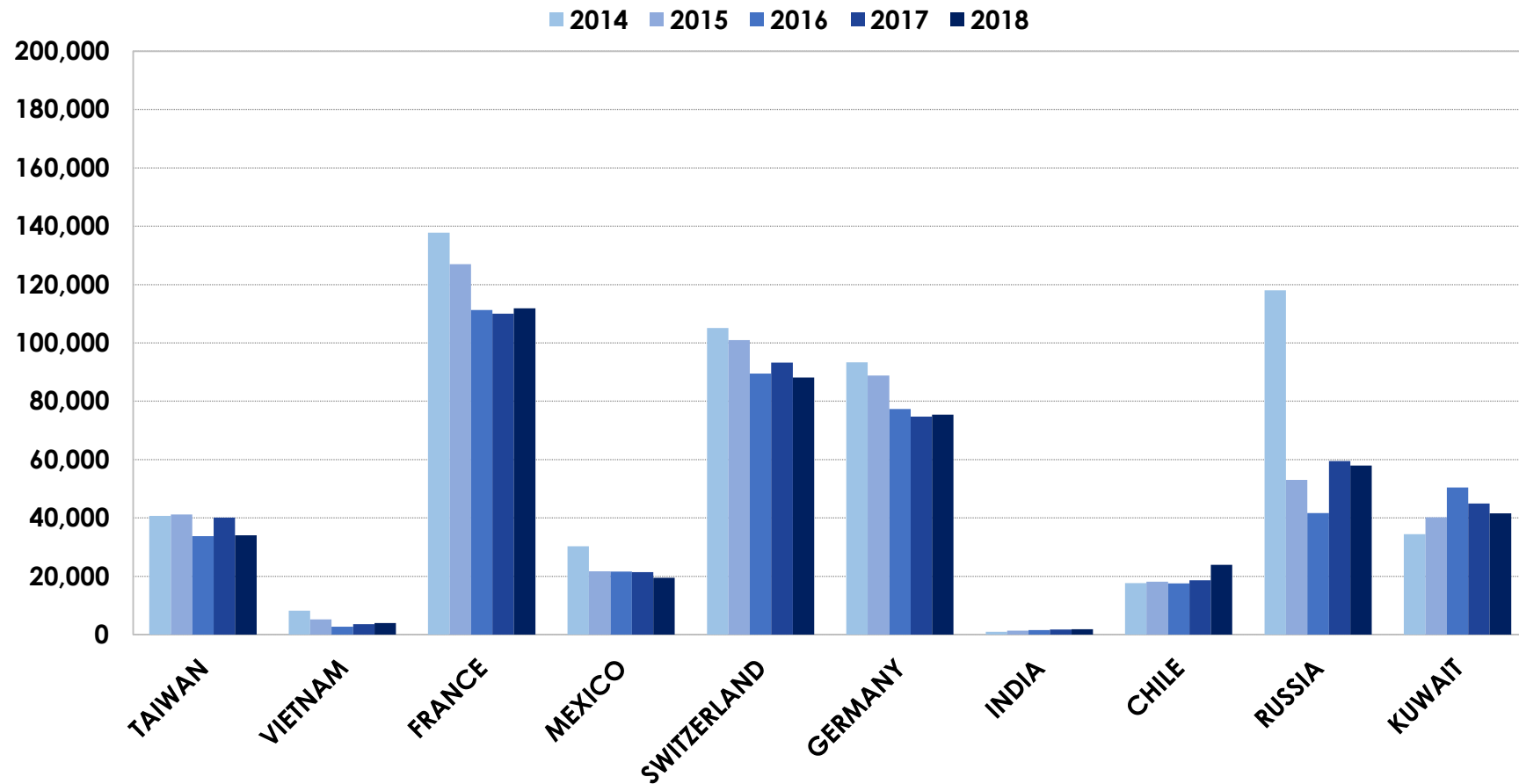
Source: BONARD, 2019

UK ELT: TOP 1-10 SOURCE MARKETS (SWs)



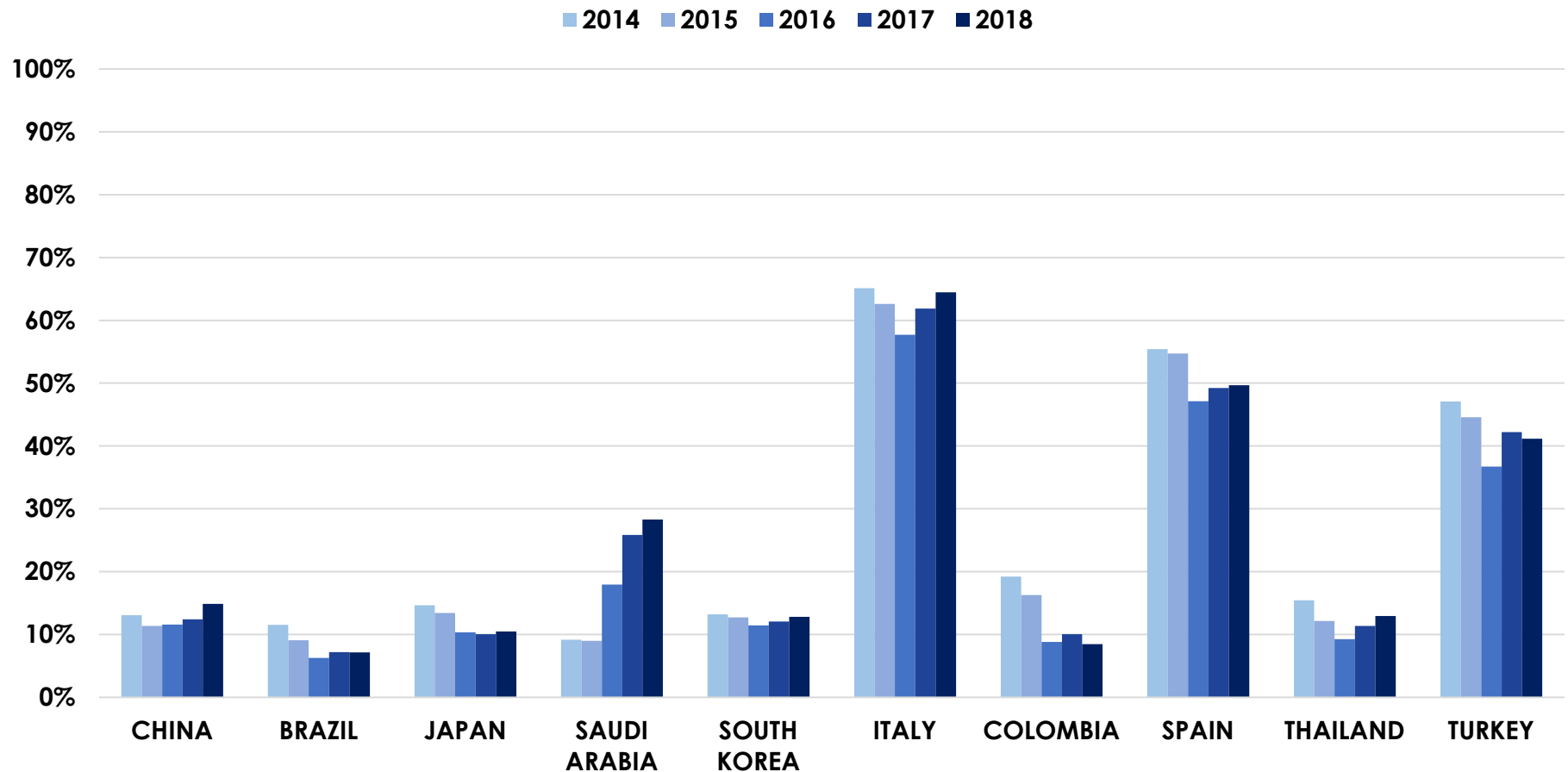
Source: BONARD, 2019

UK ELT: TOP 11-20 SOURCE MARKETS (SW_s)



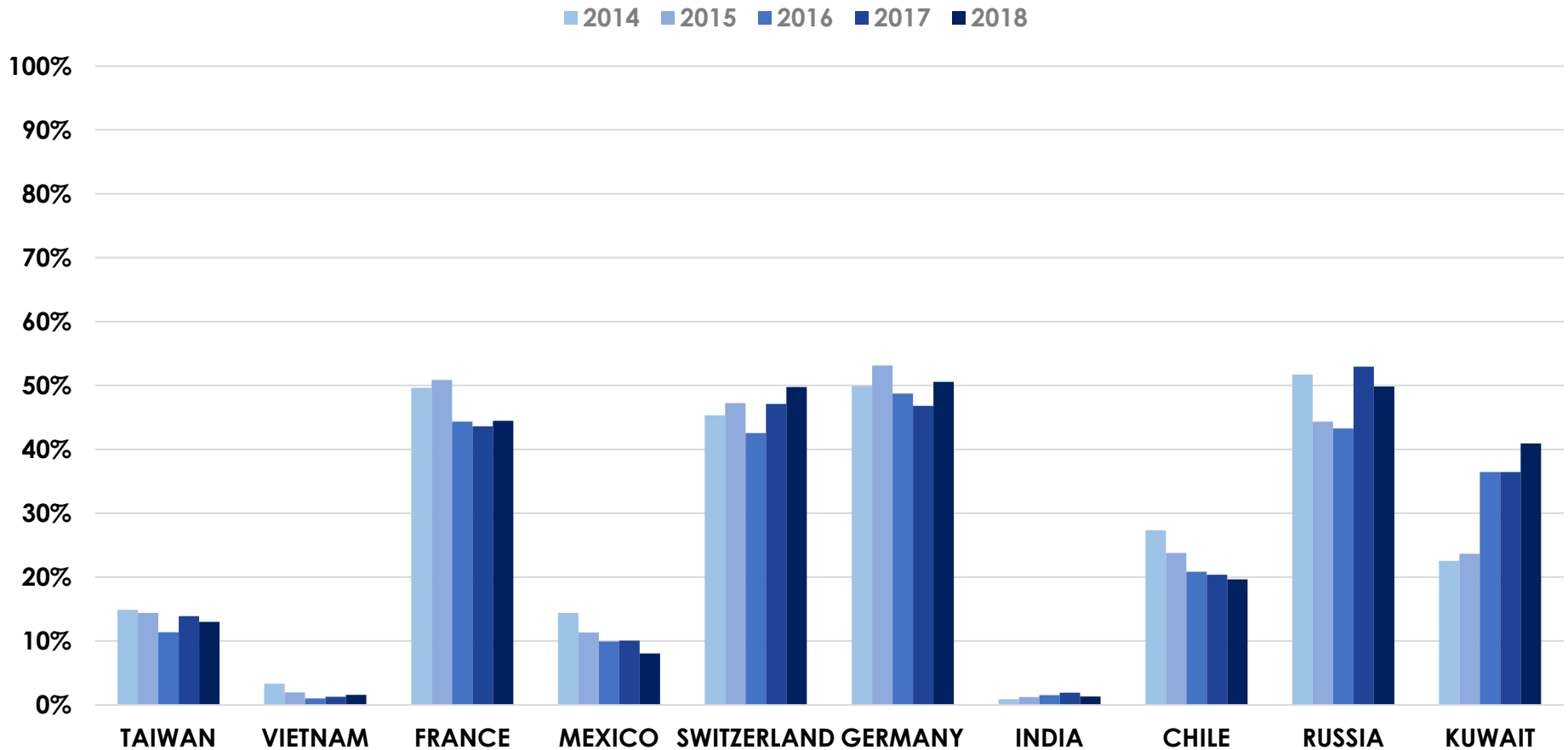
Source: BONARD, 2019

UK MARKET SHARE (%): TOP 1-10 SOURCE MARKETS



Source: BONARD, 2019

UK MARKET SHARE (%): TOP 11-20 SOURCE MARKETS



Source: BONARD, 2019

DIVERSIFICATION



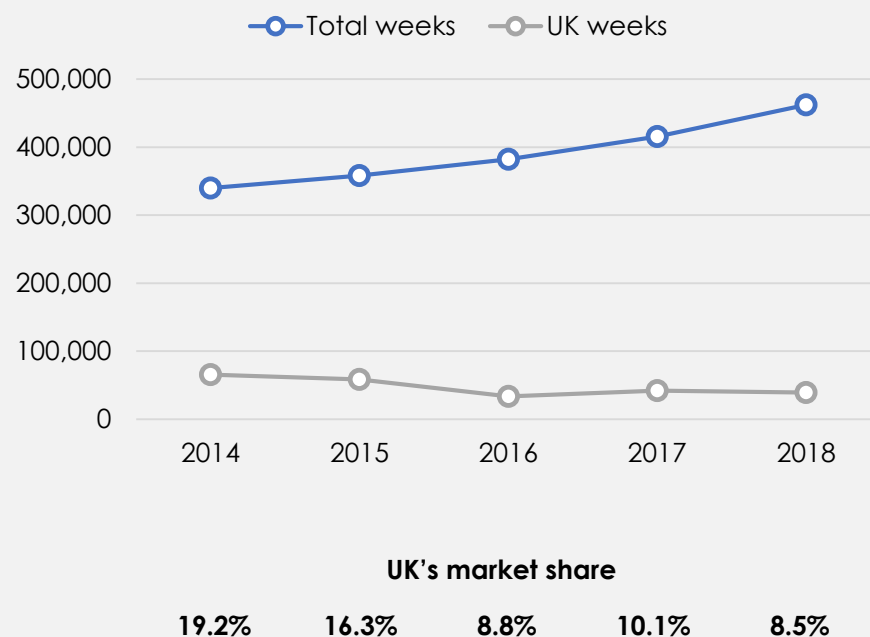


**COLOMBIA
JAPAN
MEXICO
VIETNAM
THAILAND
BRAZIL**

UK ELT: MARKETS OF THE FUTURE

COLOMBIA

Number of student weeks spent by Colombian students



Global ranking (student weeks)

2014	2015	2016	2017	2018
9.	7.	7.	7.	7.

English Proficiency Index

2014	2015	2016	2017
46.5	48.4	50.0	48.9

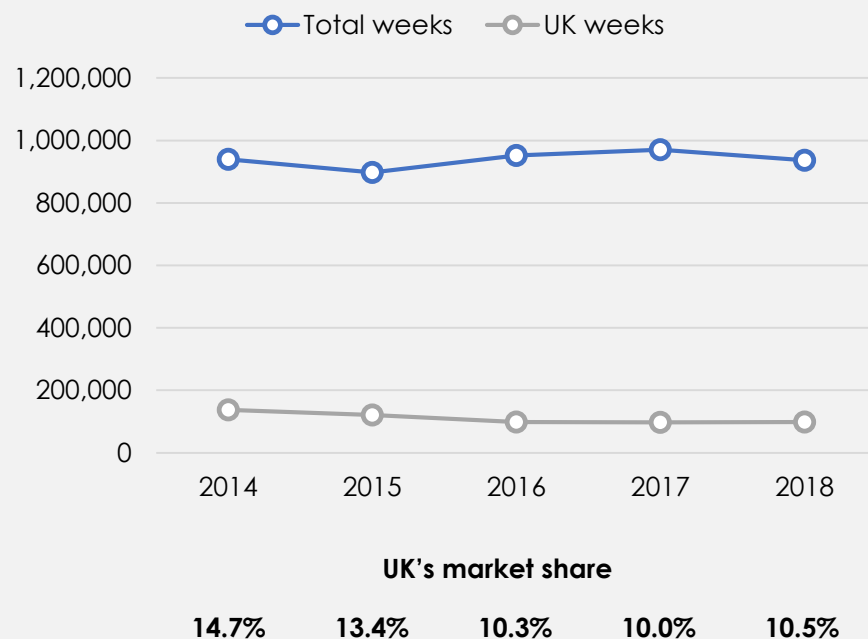
- One of the fastest-growing source markets globally, but the UK is not benefiting from this expansion.
- In fact, the UK is losing its market share (dip by 56% between 2014 and 2018).
- Most recent data indicates further growth in 2018, although the preference is towards Australia and Canada.
- Low English language proficiency levels.

Source: English UK, 2015-2019; BONARD, 2015-2019; EF EPI, 2015-2018

UK ELT: MARKETS OF THE FUTURE

JAPAN

Number of student weeks spent by Japanese students



Global ranking (student weeks)

2014	2015	2016	2017	2018
4.	3.	3.	3.	3.

English Proficiency Index

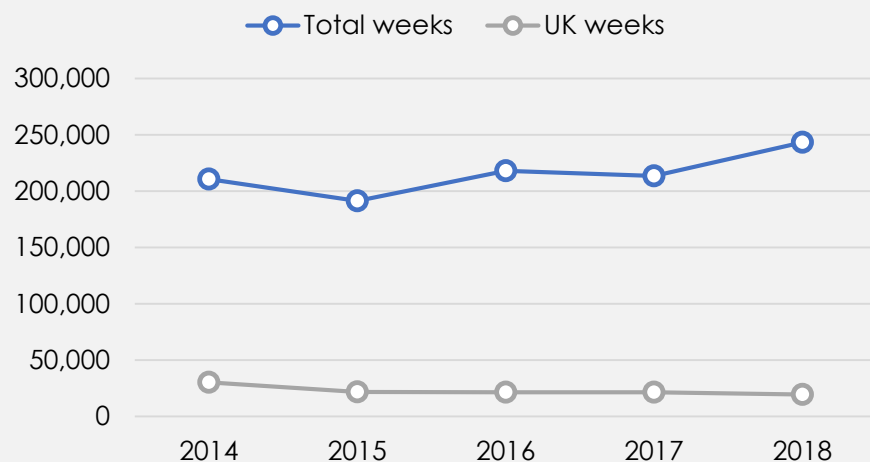
2014	2015	2016	2017
53.6	51.7	52.3	51.8

- Consistently the third largest producer of student weeks globally.
- The UK dropping its market share between 2014 and 2018.
- A considerable number of students now prefer to study English in the Philippines (not covered in the statistics).
- English language proficiency on decline.

Source: English UK, 2015-2019; BONARD, 2015-2019; EF EPI, 2015-2018

MEXICO

Number of student weeks spent by Mexican students



UK's market share

14.4% **11.3%** **9.9%** **10.1%** **8.0%**

Global ranking (student weeks)

2014	2015	2016	2017	2018
14.	16.	13.	14.	14.

English Proficiency Index

2014	2015	2016	2017
51.3	49.9	51.6	49.8

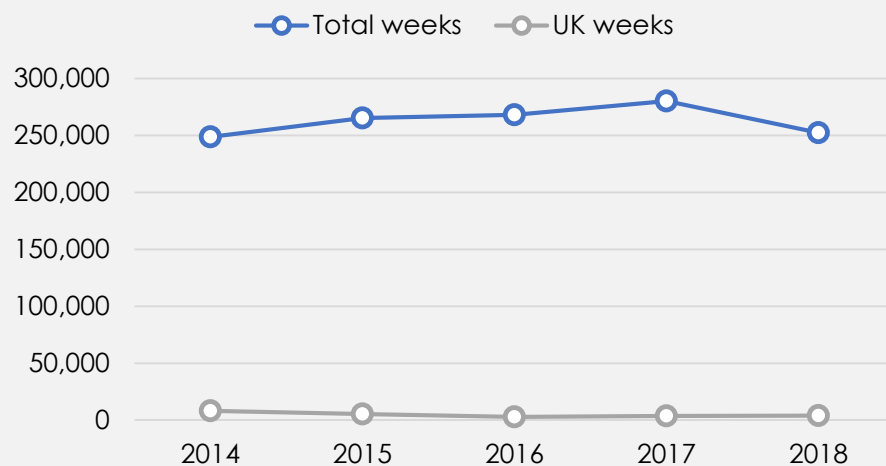
- Available data points to one of the biggest increases in student weeks between 2017 and 2018 among top 20 markets globally (in absolute figures).
- UK's market share in Mexico is on decrease.
- Low English language proficiency levels.

Source: English UK, 2015-2019; BONARD, 2015-2019; EF EPI, 2015-2018

UK ELT: MARKETS OF THE FUTURE

VIETNAM

Number of student weeks spent by Vietnamese students



UK's market share

3.3% 2.0% 1.0% 1.3% 1.6%

Global ranking (student weeks)

2014	2015	2016	2017	2018
13.	11.	14.	13.	12.

English Proficiency Index

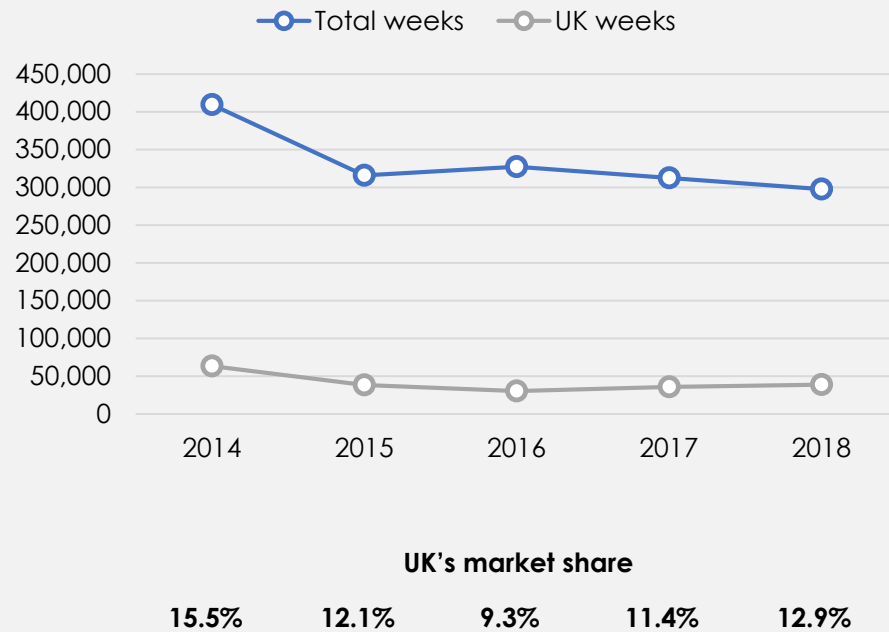
2014	2015	2016	2017
53.8	54.1	53.4	53.1

Source: English UK, 2015-2019; BONARD, 2015-2019; EF EPI, 2015-2018

UK ELT: MARKETS OF THE FUTURE

THAILAND

Number of student weeks spent by Thai students



Global ranking (student weeks)

2014	2015	2016	2017	2018
8.	10.	10.	11.	9.

English Proficiency Index

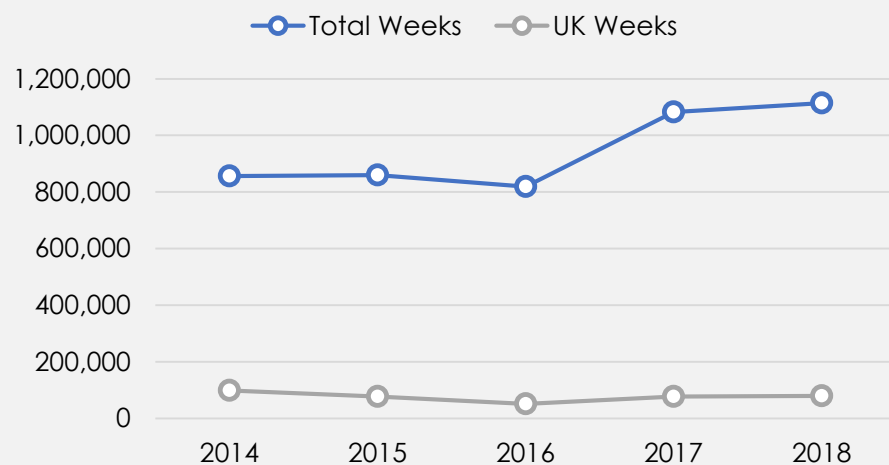
2014	2015	2016	2017
45.4	47.2	49.8	48.5

Source: English UK, 2015-2019; BONARD, 2015-2019; EF EPI, 2015-2018

UK ELT: MARKETS OF THE FUTURE

BRAZIL

Number of student weeks spent by Brazilian students



UK's market share

11.5% 9.1% 6.3% 7.2% 7.2%

Global ranking (student weeks)

2014	2015	2016	2017	2018
5.	5.	5.	2.	2.

English Proficiency Index

2014	2015	2016	2017
51.0	50.7	51.9	50.9

Source: English UK, 2015-2019; BONARD, 2015-2019; EF EPI, 2015-2018

INDUSTRY SURVEY



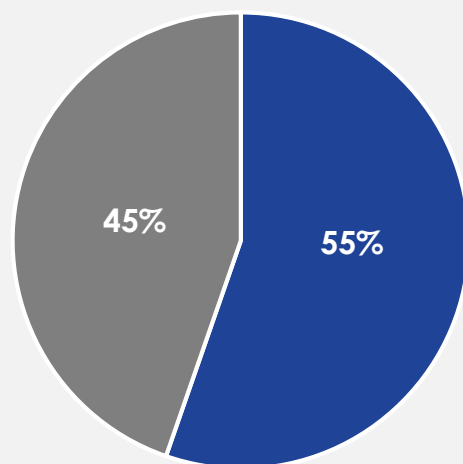
BREXIT READINESS INDUSTRY POLL ON AGENTS

RESPONDENT PROFILE

194
responses

50
countries

- Responses from EU/EEA countries
- Responses from Non-EU/EEA countries



TOP RESPONDING COUNTRIES

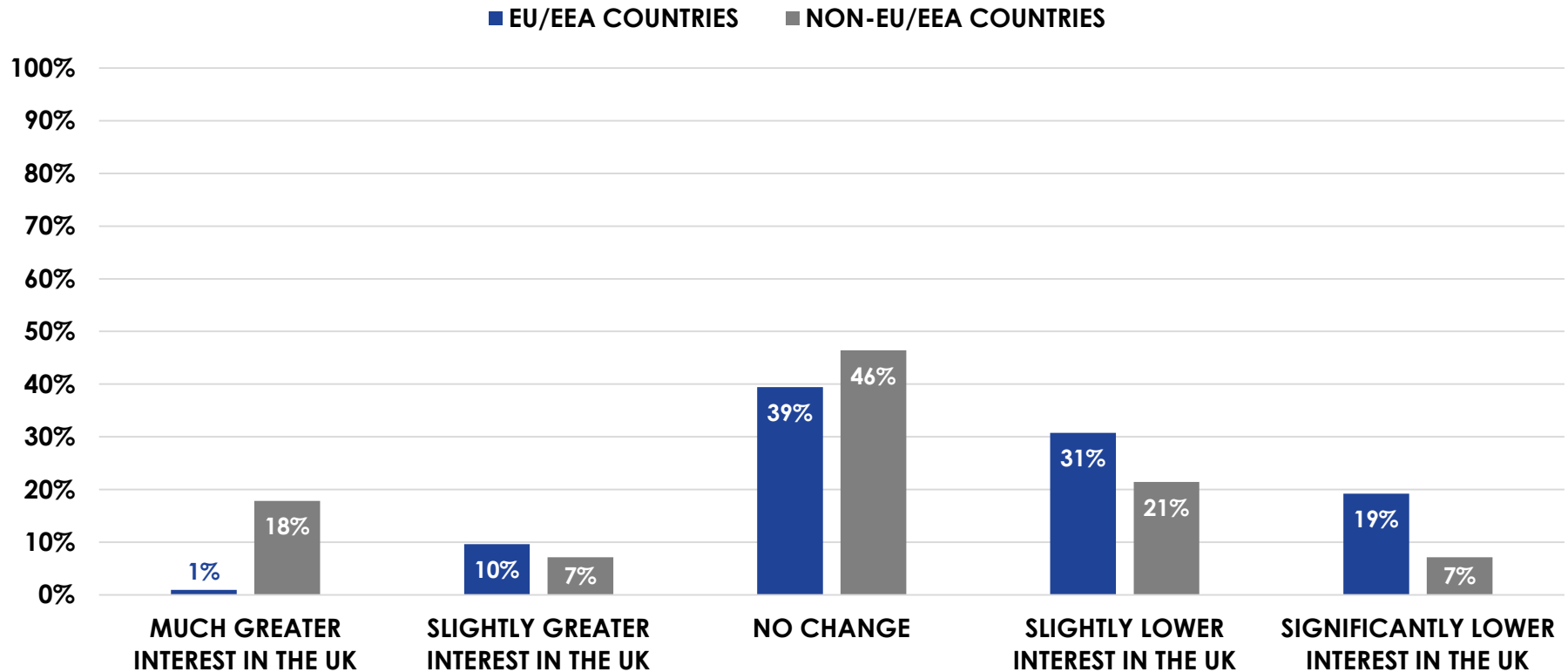
Italy
Spain
Turkey
Russia
France
Germany
Poland
Brazil
Colombia
Switzerland

Collected in early October 2019

Source: BONARD, 2019

BREXIT READINESS INDUSTRY POLL ON AGENTS

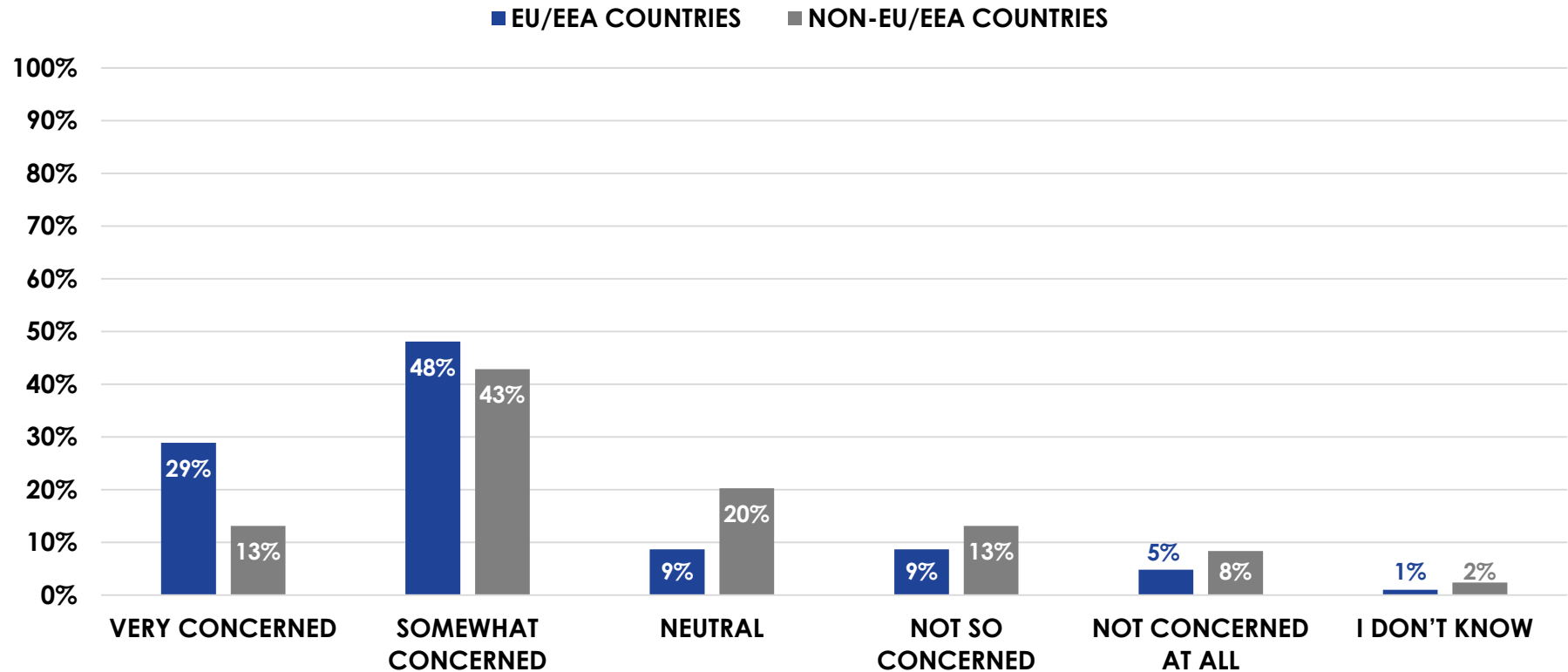
Q: Has your agency noticed a change in demand for the UK in the run-up to Brexit (within the last 6 months)?



Source: BONARD, 2019

BREXIT READINESS INDUSTRY POLL ON AGENTS

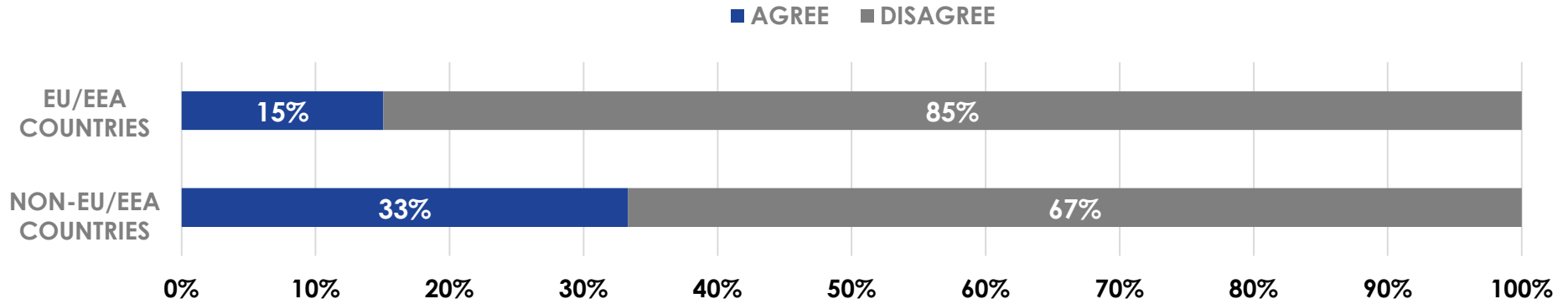
Q: How concerned are your customers with regard to Brexit?



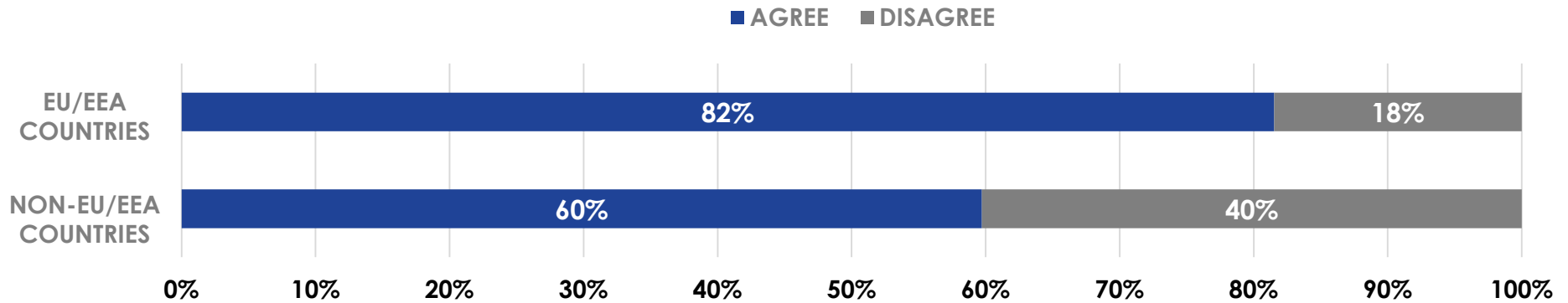
Source: BONARD, 2019

BREXIT READINESS INDUSTRY POLL ON AGENTS

Brexit will have no impact (either positive or negative) on the UK ELT sector.



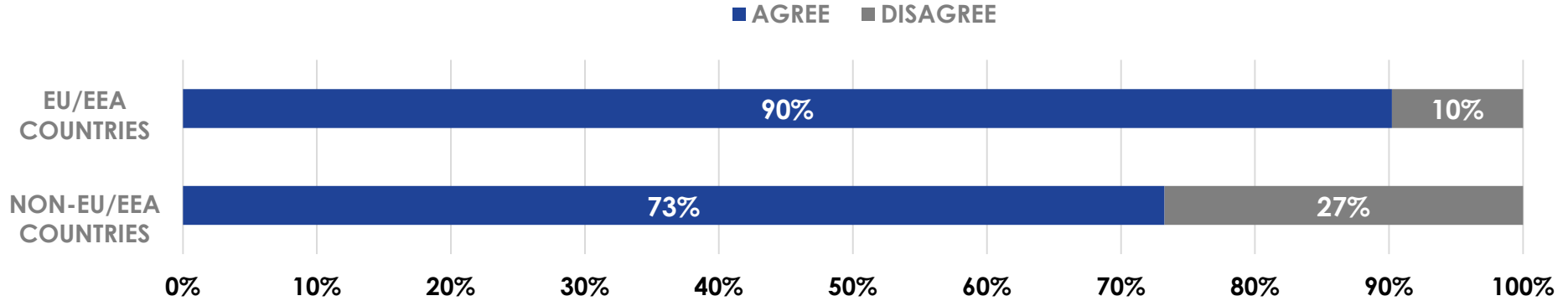
Education agencies will increasingly promote English courses in other destinations.



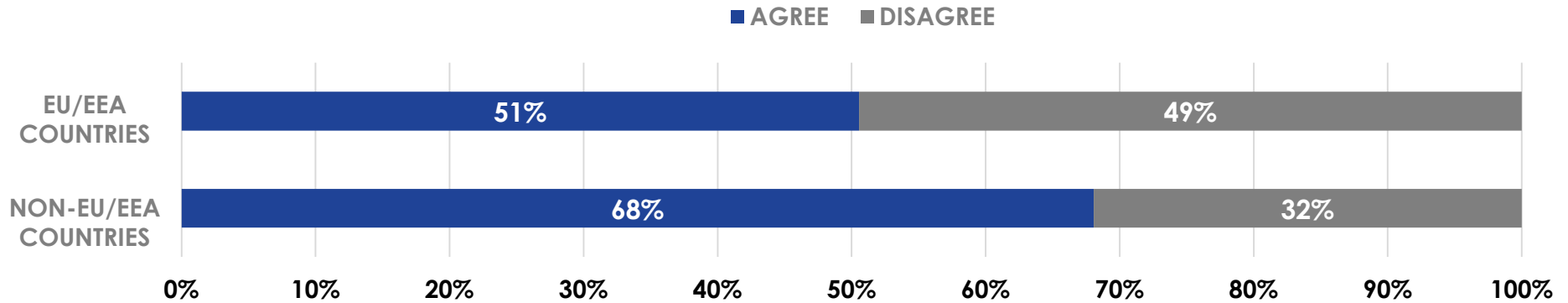
Source: BONARD, 2019

BREXIT READINESS INDUSTRY POLL ON AGENTS

Brexit will have an impact on education-related funding for courses in the UK.



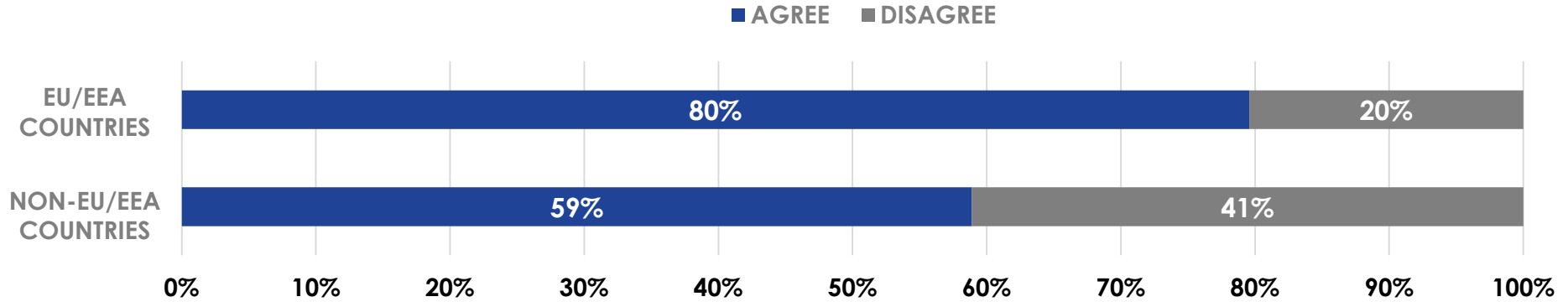
More favourable currency exchange rates will bring more English language students to the UK.



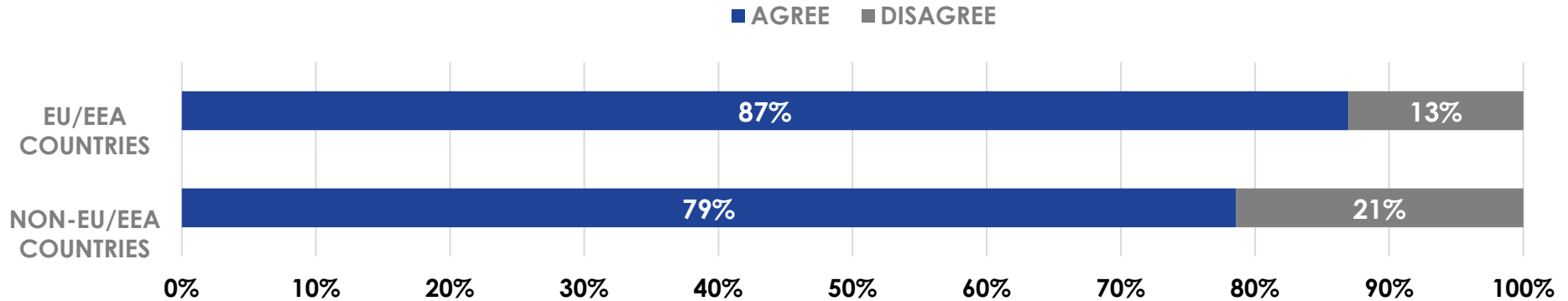
Source: BONARD, 2019; n= 72

BREXIT READINESS INDUSTRY POLL ON AGENTS

New visa policies will increase administration costs for education agencies.



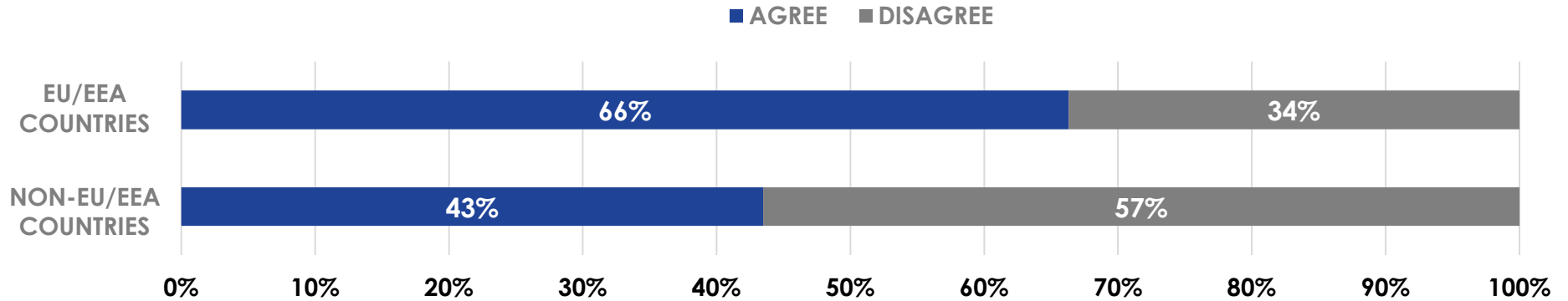
Other ELT destinations will benefit from Brexit (e.g. Ireland, Malta).



Source: BONARD, 2019

BREXIT READINESS INDUSTRY POLL ON AGENTS

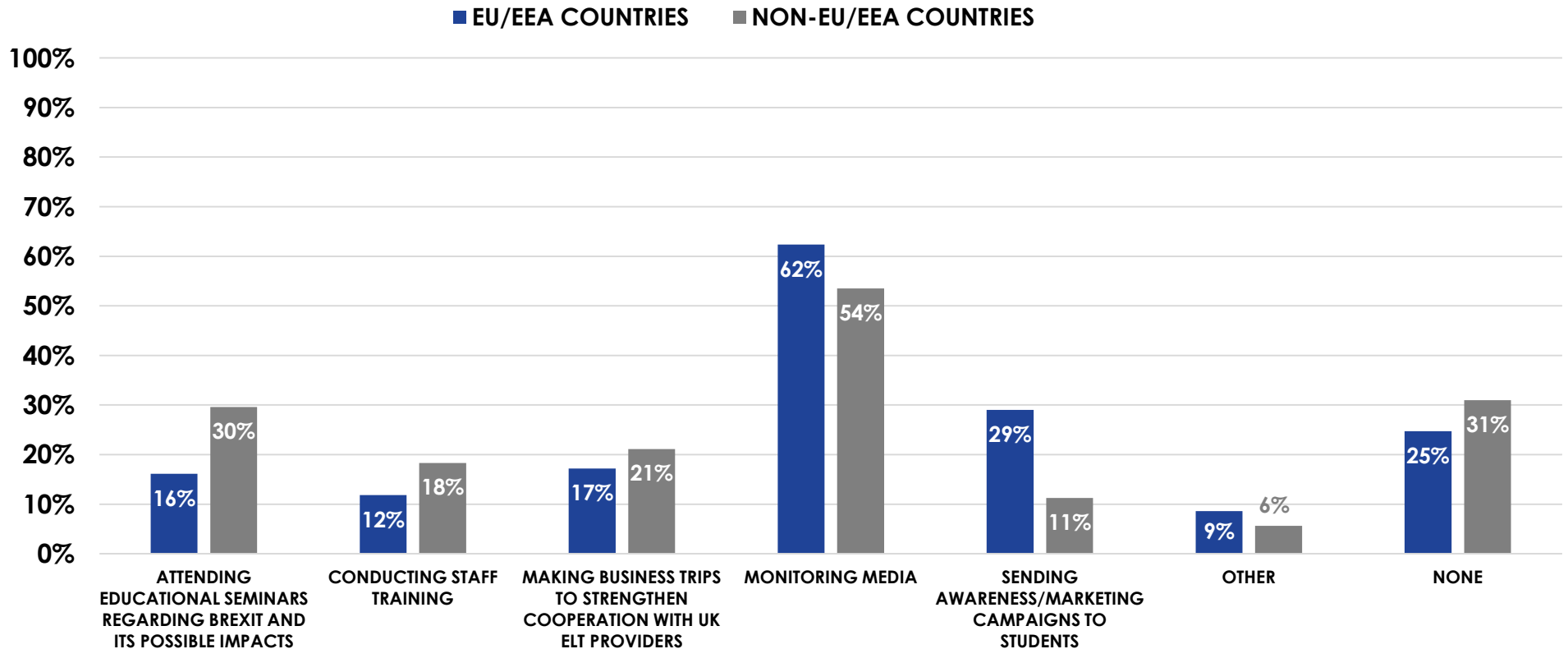
Students will be less interested in the UK as study destination for English courses.



Source: BONARD, 2019

BREXIT READINESS INDUSTRY POLL ON AGENTS

Q: Has your agency taken any of the following actions with regard to Brexit?



Source: BONARD, 2019; multiple options possible

Q: How could English UK help your agency with regard to the nearing Brexit?



SUMMARY

Imminent opportunities

- Fluctuation in currency exchange rates
- Availability of scholarships
- Special promotions with most valued partners

Mid-term opportunities

- Develop new channels
- Develop new markets

Strategic goals

- Maintain existing relationships
- Develop new products

SELECT THE RIGHT MARKETS & APPROACH

- Established vs emerging markets: how to strike a balance
- How to identify emerging markets: QUIC data can help determine the right selection – combine data by age group, programme/course type, booking source and booking type to match your institution's profile
- Assess your market penetration levels: Tier 1 vs Tier 2 and Tier 3 cities
- Individual vs joint marketing (e.g. an individual sales trip or a trade mission)
- Communication: some response better than no response – agents do not want to dwell in uncertainty and are ready to look/already looking for alternatives to the UK



Salztorgasse 2

1010, Vienna

Austria

www.bonard.com

info@bonard.com

+43 650 612 4527



BONARD