

PRESENTATION

Panel discussion

Trends and Future Prospects in Language Education Abroad

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ICEF

Connect. Recruit. Grow.

Language schools @ ICEF Events

(2008 - 2018)

	2008	2013	2018
Unique clients	343	400	387
% of all education providers	42,6%	35,7%	29,6%

Language schools worldwide promoting their native language (unique clients)

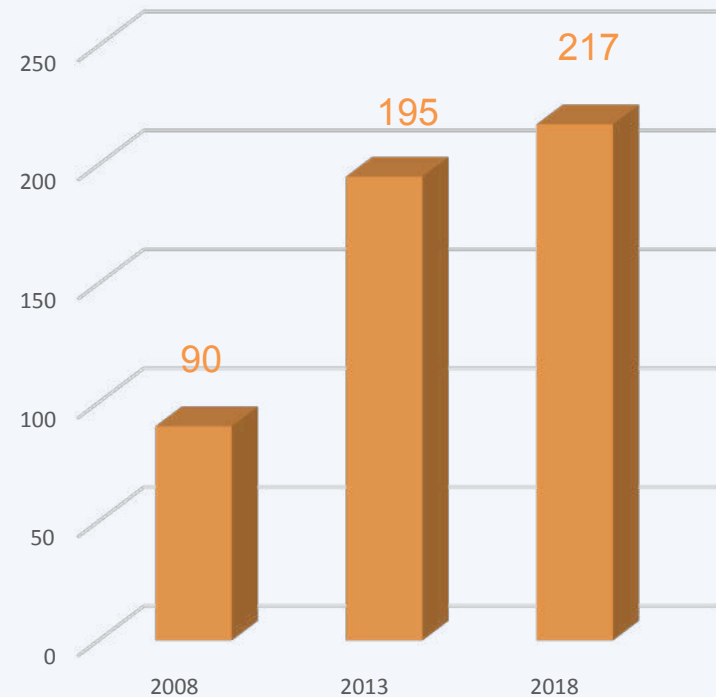
	2008	2013	2018
English	241	288	270
Spanish	30	33	37
French	24	32	30
German	16	19	23
Italian	9	9	11
Chinese	5	1	2
Russian	4	2	2
Arabic	4	1	0
Japanese	4	5	1
Portuguese	2	4	2
Korean	0	0	1
Other	4	6	8
Grand Total	343	400	387

Type of language courses schools are promoting (2008 - 2018)

Summer Programme

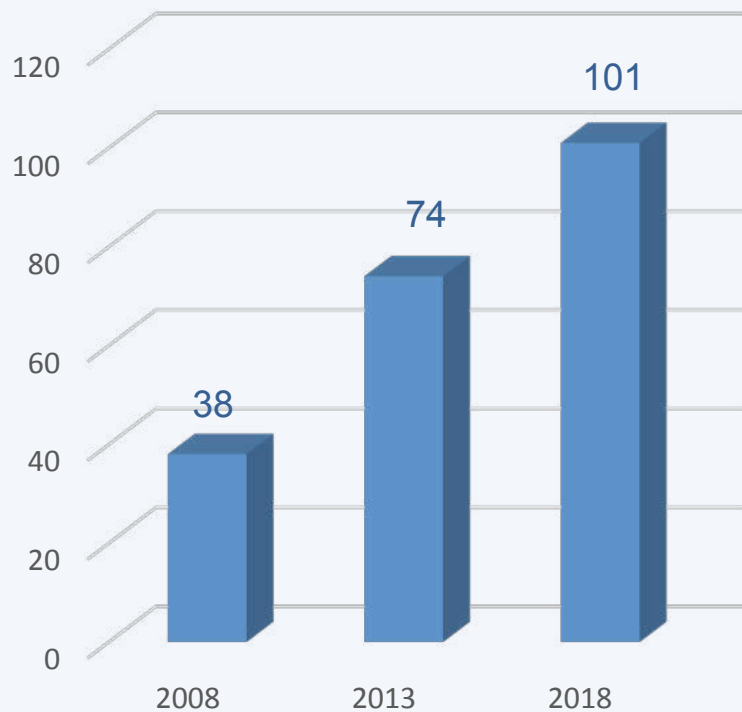


Junior Learners

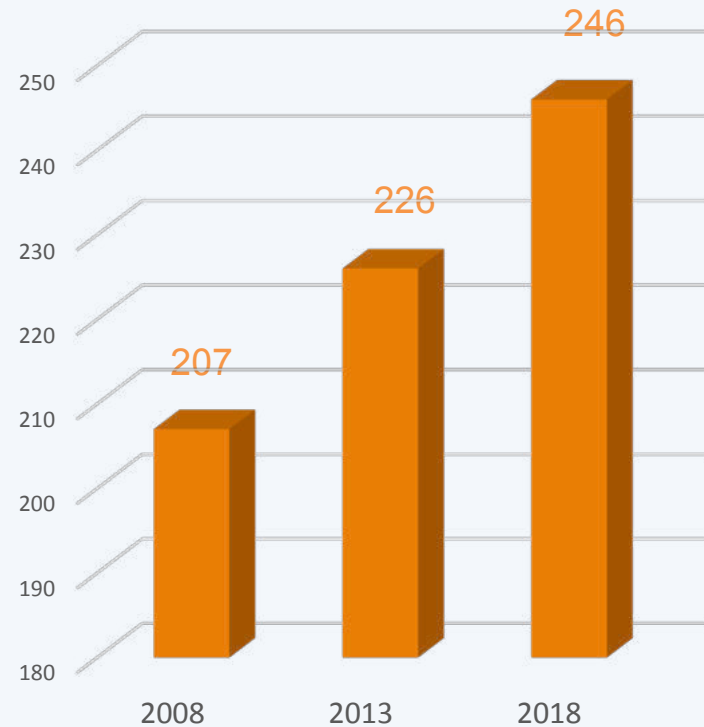


Type of language courses schools are promoting (2008 - 2018)

E-learning / Online learning



Certificate / Test Preparation



English vs. other language programmes

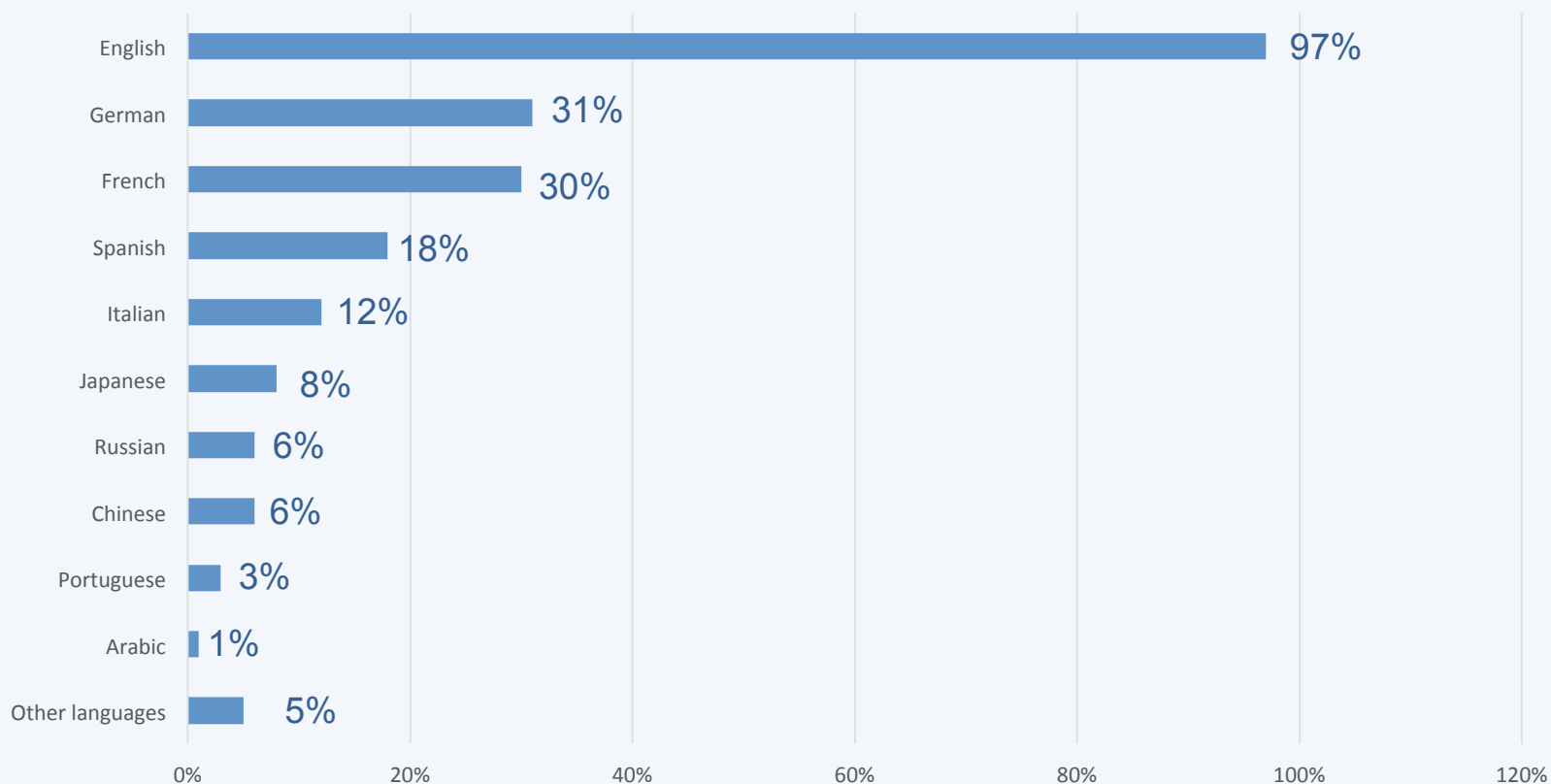
2012

- English language programmes – 135 students / agent
- Other language programmes – n/a

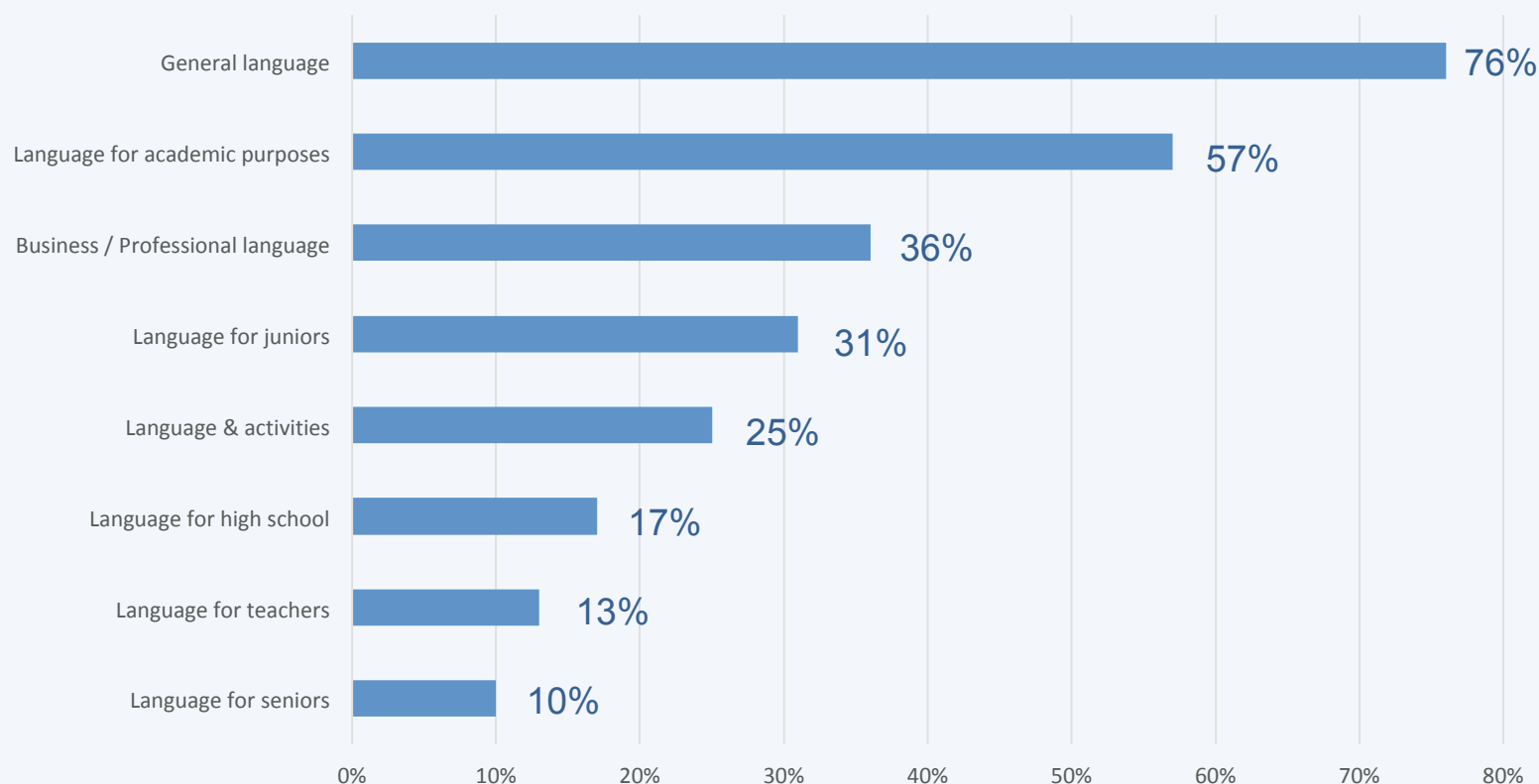
2018

- English language programmes – 195 students / agent
- Other language programmes – 25 students / agent

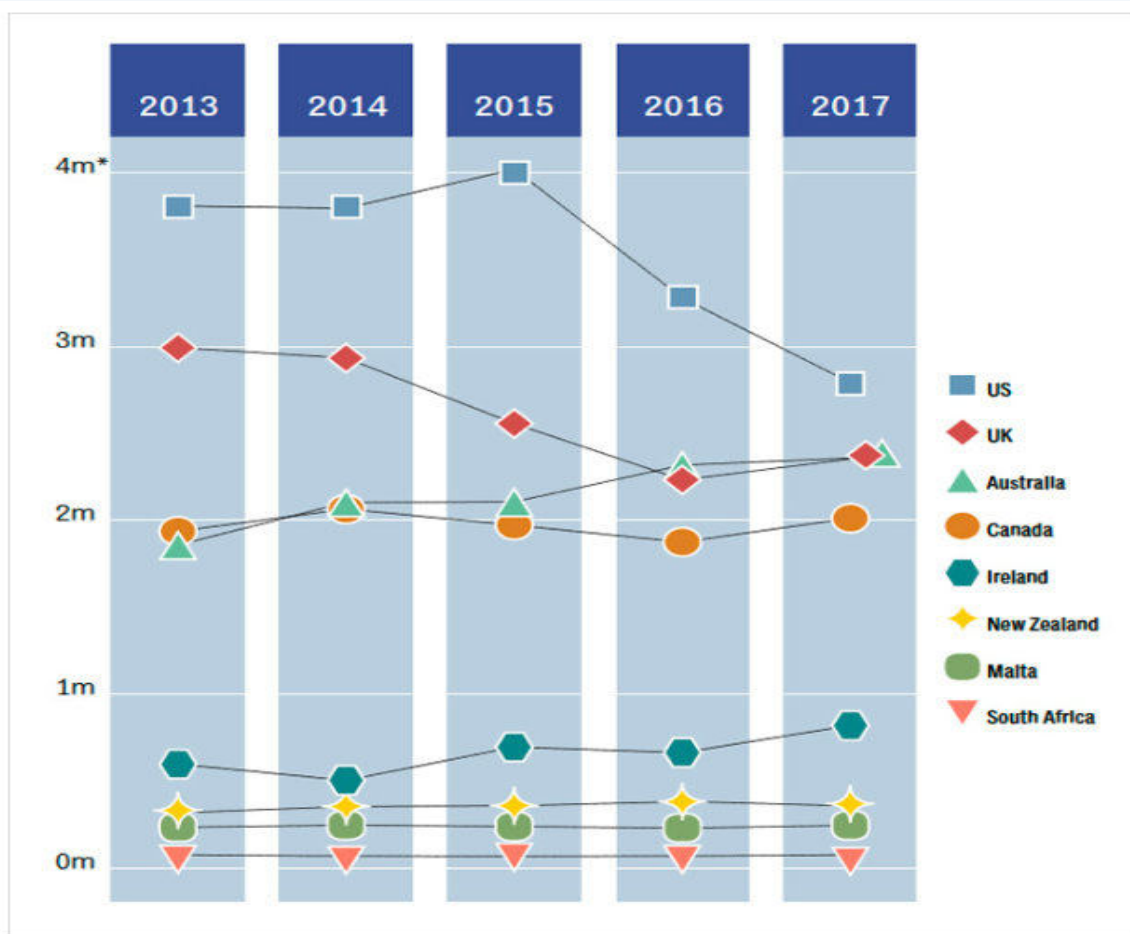
Agents sending students to language programmes (2018)



Type of language programme agents are placing students in (2018)



ELT destinations – student weeks



Tracking market share (in student weeks) for leading ELT destinations, 2013–2017. Source: StudentMarketing, ICEF Insights

Summary

- Global growth is slowing
- The junior segment has grown quickly over the past several years, and is helping to keep overall language training volumes more or less level and/or helping to drive real growth in some destinations
- Significant shifts in market share among ELT study destinations