



# A globally connected community

IDP Education

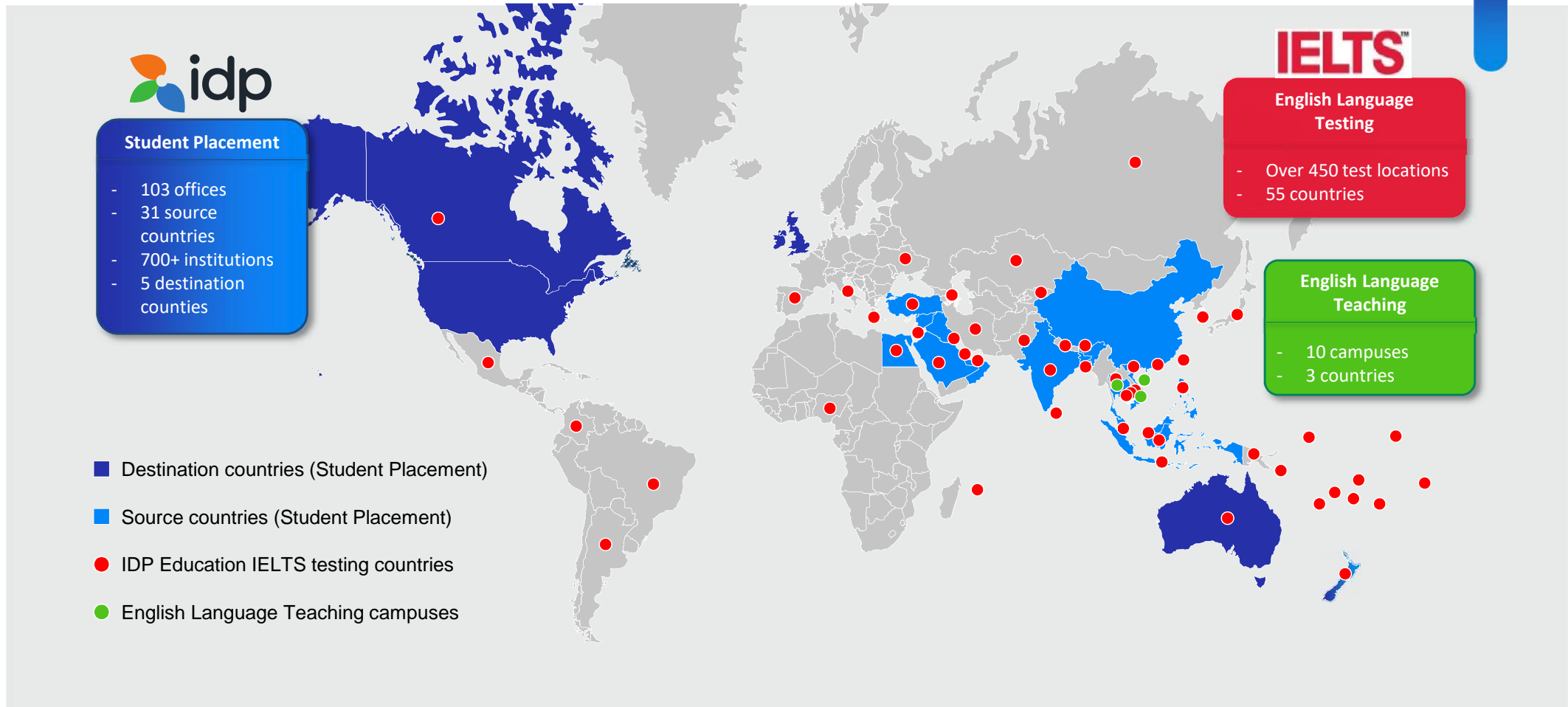
Evans & Partners Conference

8 November 2017



## An extensive global network

For Student Placement, IDP Education sources students through 103 offices across 31 countries, placing them into over 700 institutions across 5 destination countries...

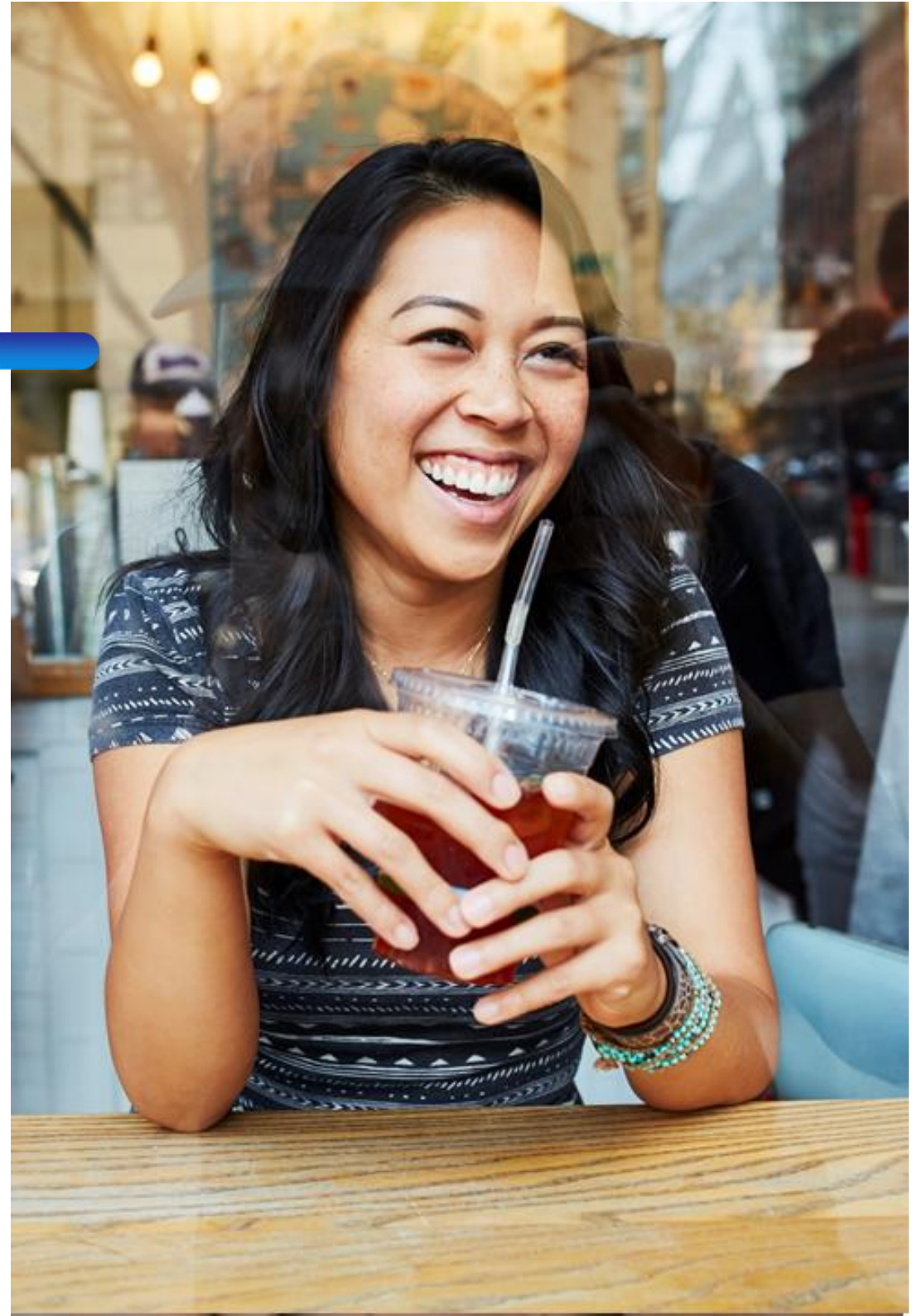
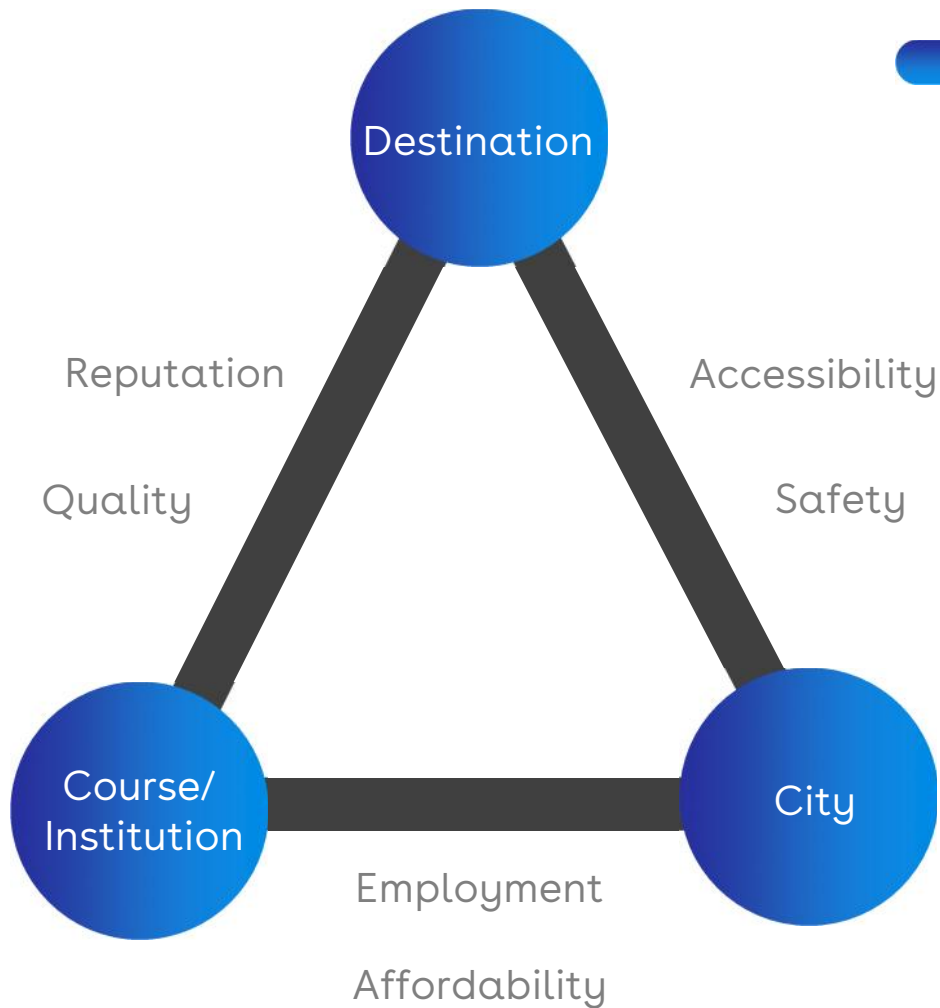


...as part-owner of IELTS, IDP Education has over 450 IELTS test locations in 55 countries

# Student Choice & Perceptions

## Student Choice

A number of connected educational and lifestyle factors influence student choice

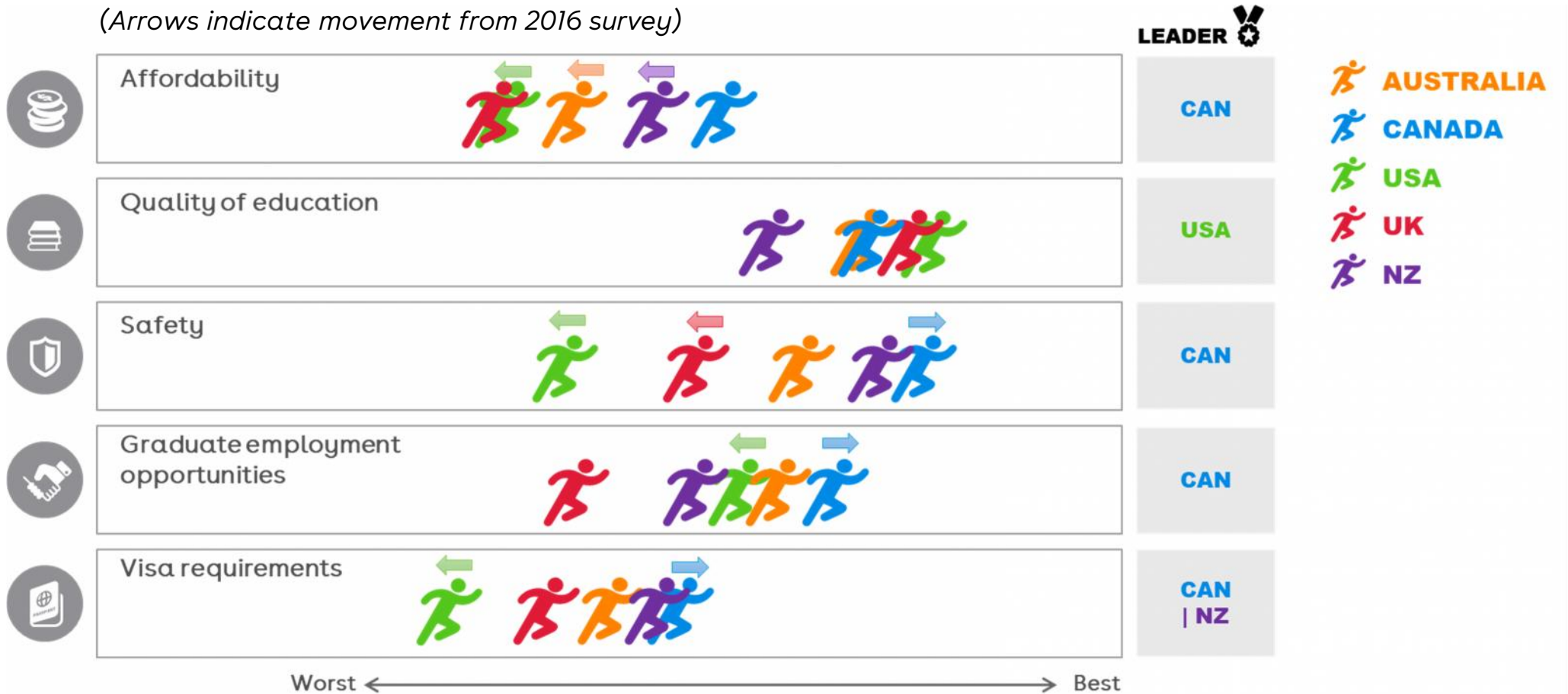


# IDP Student Perceptions

IDP's annual student survey monitors changing student perceptions and expectations

## Perceptions of study destination (2017)

(Arrows indicate movement from 2016 survey)

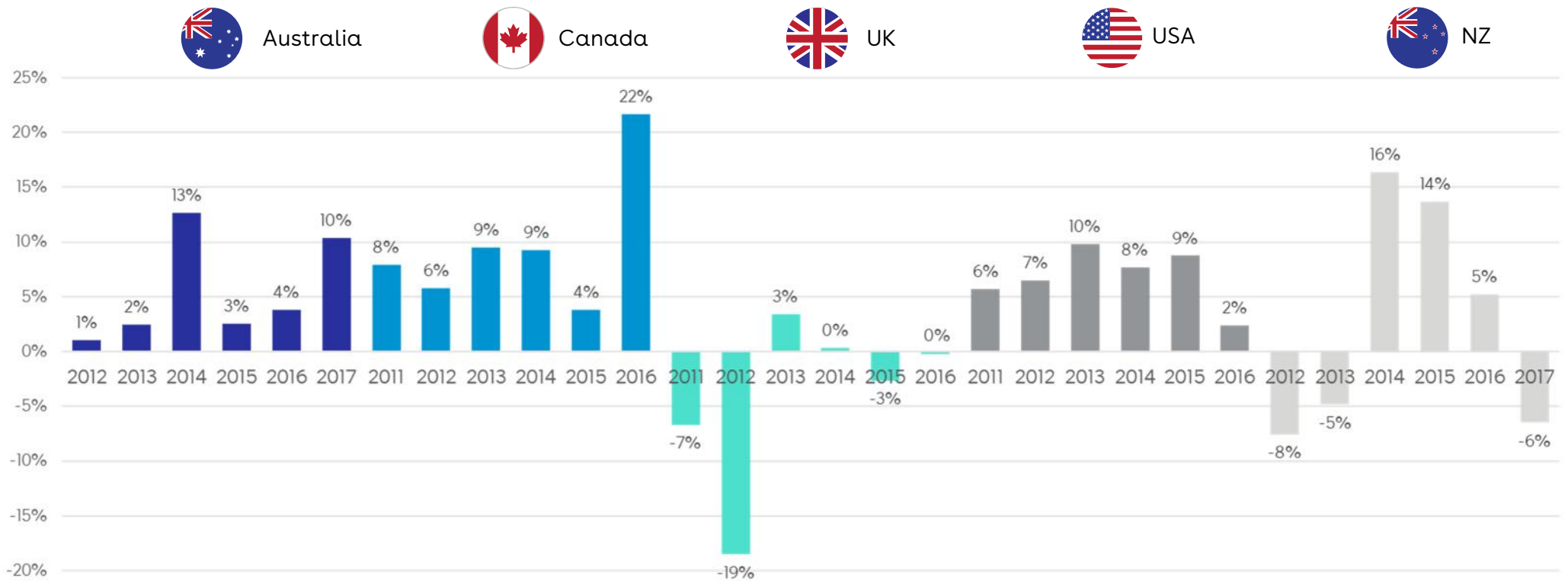


\* Source: IDP Student Buyer Behaviour survey. Students are asked to rate their perceptions of each destination that they were familiar with on different drivers of choice

# Industry growth rates

Visa policies and perceptions impact student flows

## International student growth rates by study destination\*



\*Sources: Australia - DIBP, total international student visa grants (all sectors) for 12 months ended 30 June each year; Canada - CIC, total international student visa grants data for 12 months ended 31 December each year; UK - UK Home Office, non-EU offshore student data for 12 months to 31 December each year; US - IIE Open Doors, new international student enrolments data for 12 months to 30 Sept each year; NZ - Department of Labour (Immigration) total international student visa data for 12 months ended 30 June each year

# Future student search behaviour

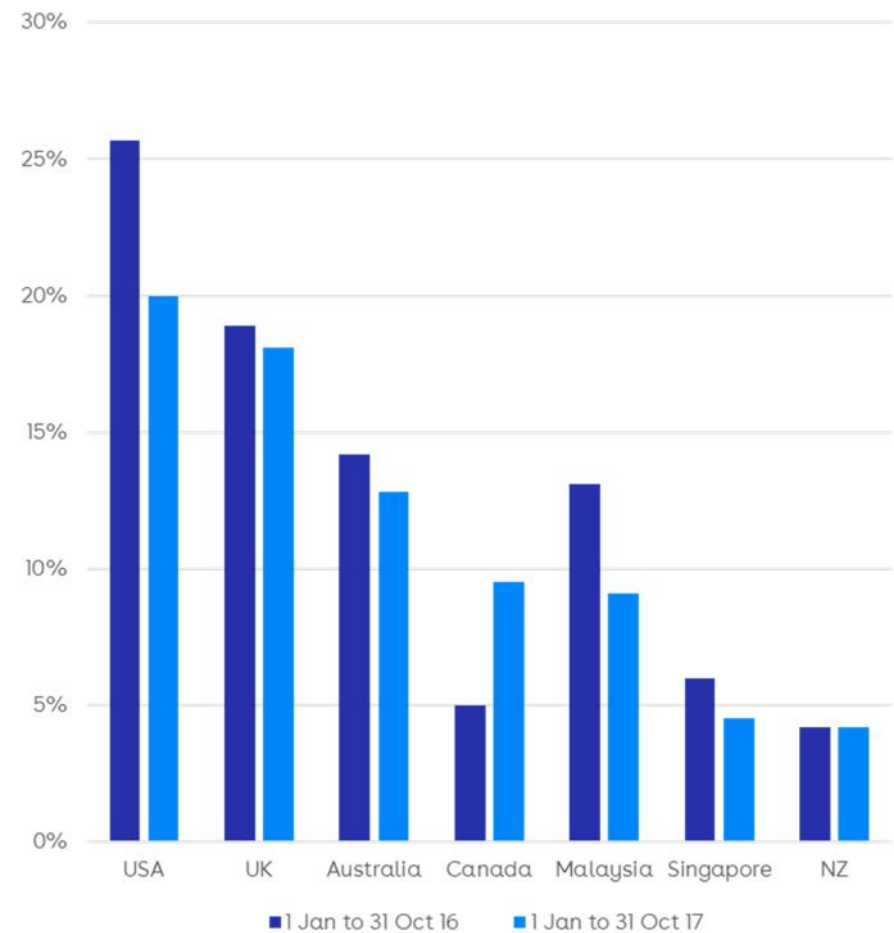
Hotcourses data provides real-time insights into student demand

## The Hotcourses Group

- Hotcourses (acquired by IDP in January 2017) is one of the world's leading digital student engagement and marketing businesses
- Hotcourses operates across the international and domestic UK student markets
- Internationally, its websites attracts over 38m visits pa
- The UK domestic websites generate over 25m visits pa
- The acquisition is significantly enhancing IDP's digital capability and access to students as they start their international education journey



## Hotcourses international search volumes by destination



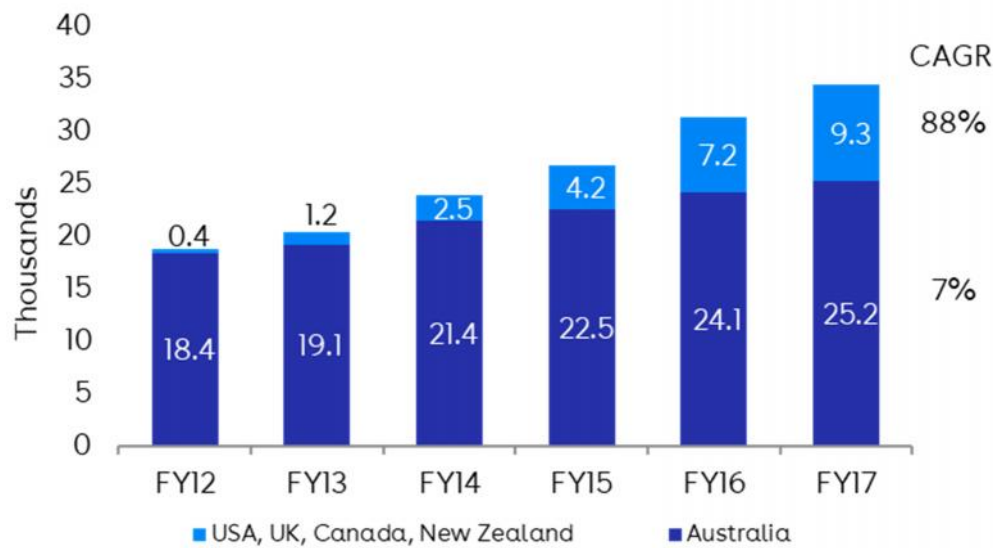
# IDP Performance



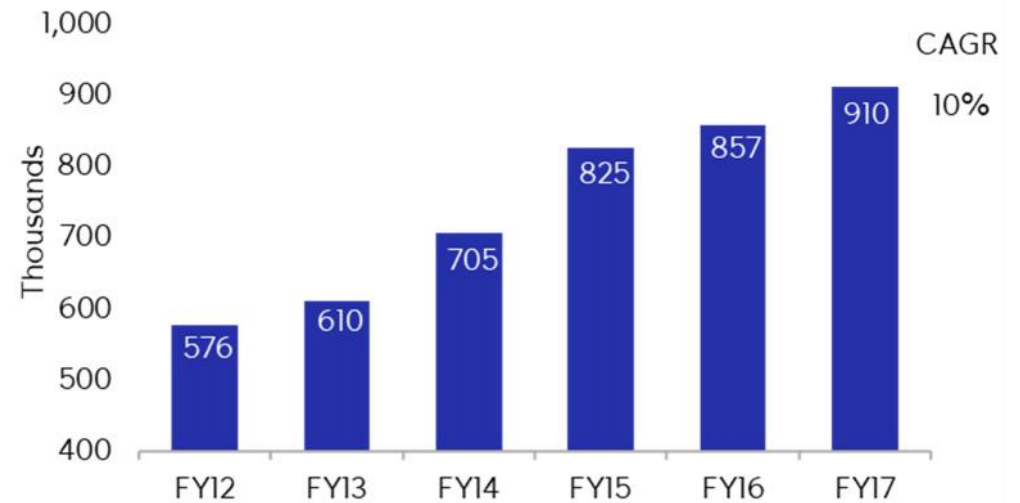
# IDP Education

Student Placement and IELTS leveraged to structural industry growth

### IDP - Student Placement Volumes



### IDP - IELTS Volumes



# FY17 Performance

Strong revenue growth across all service categories

English Language Testing

Student Placement

English Language Teaching

Advertising & Events \*\*

FY17 revenue **\$250.7m**

Growth\* (constant currency) **↑ Up 10%**

**\$103.4m**

**↑ Up 16%**

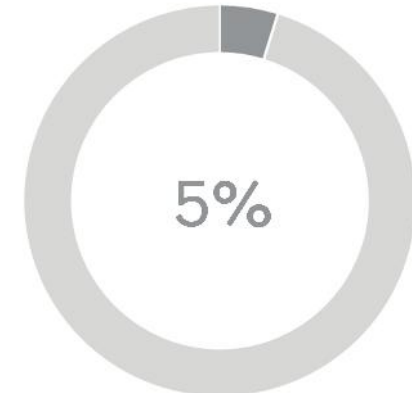
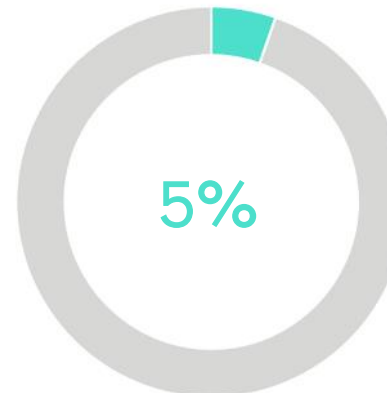
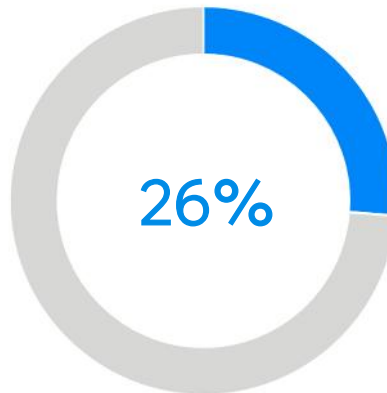
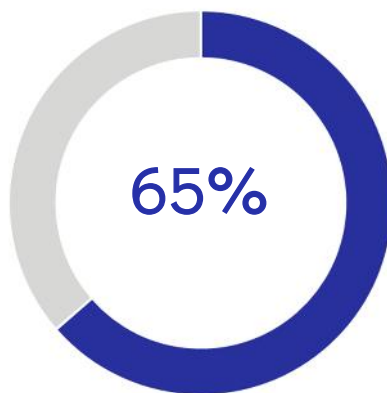
**\$21.2m**

**↑ Up 8%**

**\$18.9m**

**↑ Up 90%**

% FY17 revenue



\* Growth expressed on a "Constant Currency" basis. Constant currency growth is calculated by restating the prior comparable period's financial results using the actual FX rates that were recorded during the current period. The FY16 revenue shown here is statutory revenue not adjusted for currency movements

\*\* Advertising and Events revenue on this page includes a five month contribution from Hotcourses which was acquired in February 2017. It also includes "Other" revenue of A\$3.6m which was reported separately in the FY17 accounts

# Strategy

# A global platform

We are building a global platform and connected community that will guide international students along their journey to achieve their lifelong learning and career aspirations

Deliver world-leading capabilities and services...



World's best course search

Leading CRM and CMS

Digitising student expos

Global contact centre

Virtual Agency

Leading office network

Value added services

Career

...on an integrated global platform...



The world's definitive international student dataset and connected community



...ensures that we understand the needs and expectations of students and clients

Connecting our customers to success

# Summary

Continued growth provides solid foundations for digital transformation



Aligned to macro trends in key markets for international education and the use of the English language



A global network that reduces risk through diversification



Hotcourses acquisition enhances our digital reach and capability



A bold and transformative strategy that will drive long term growth

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