

**Four Change Drivers of Future Language Travel:  
Disruption  
Fragmentation  
Brand Consolidation  
and Bespoke Offerings**

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**Summary**

The global language travel industry has entered a multi-tiered and dynamic disruption period. For one, the recent years have seen mergers and acquisitions, with new reach and scale as a key driver. At the same time, a second disruptive factor is starting to impact the industry – increasingly sophisticated online learning delivery models. These models are, while much improved relative to 5-10 years ago, still a far cry away from what can be expected to be available in five to ten years. A third disruptive factor is the shift in international student mobility which is moving into intra-Asia (and Africa-Asia) mobility patterns. In addition, many traditional sending countries such as Japan and South Korea are experiencing sharp demographic declines while new sending countries are emerging – albeit with different English language learning patterns.

An inevitable result of the above is the fragmentation of delivery and business models which will become even more global, more modular, and shorter lived. This might sound surprising in light of the on-going consolidation pressures, but the rich landscape of newly emerging market opportunities and low barriers to entry (delivered online) can be expected to swing the pendulum towards new and different business models. Part of this swing will be a new wave of brand consolidation. This will apply to higher education institutions which will reach much more deeply into international student pipelines, including the establishment of institutionally branded upper secondary schools aimed at improving the quality of their student intake.

A final trend which is already emerging is the rise of bespoke and often high value language education delivery models. The University of British Columbia's pathways college (Vantage) charges CAD 51,000 for one year of teaching, room, and board on campus. This is a harbinger of things to come: Premium price point on-campus models will battle with technologically sophisticated delivery models such as those being rolled right out by the Minerva Project. Language schools which lack a clear differentiated business model will struggle to succeed, or even survive.

This session will reflect on the above and try to address the following questions: Will sophisticated, MOOC-style language learning offerings significantly depress the need for language travel? Will new business models be needed which spread language teaching options and services across a wide spectrum – creating finely tiered a la carte models? Will classic language study destinations lose out to newly emerging players owing to cost and complexities entering certain countries? What are strategic options for language travel providers in the coming years?