



Celebrating Generation IDP



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Non-IFRS Financial Information

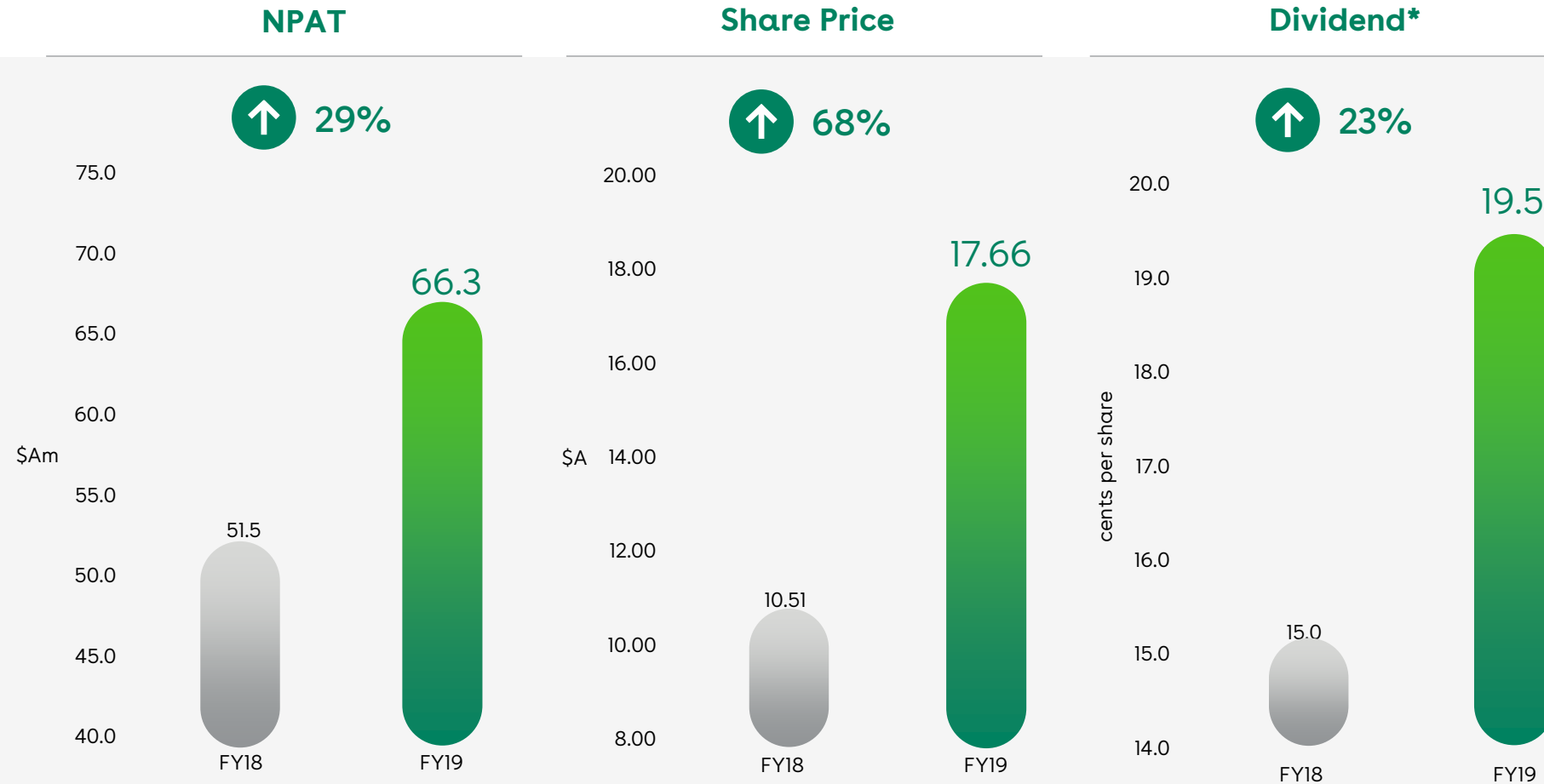
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Note: All financial amounts contained in this presentation are expressed in Australian dollars unless otherwise stated. Any discrepancies between totals and the sum of components in tables contained in this Presentation are due to rounding.



Peter Polson Chairman

Strong performance and returns for shareholders



* Total dividends declared in FY19

Building the global platform and connected community



Connecting our customers to success

➤ Delivering world-leading capabilities and services...



World's best course search



Leading office network



Global contact centre



Virtual Agency



Leading CRM and CMS



Digitising student expos



Student Essentials (value added services)



Career support

➤ ...on a global platform...

IDP

IELTS

IDP Connect

Other Partners

➤ ...empowers IDP to support customers and clients using data-driven insights





Andrew Barkla Managing Director and Chief Executive Officer



Performance Highlights

English Language Testing

 **359.7m**

FY19 revenue up 17%

Student Placement

 **170.3m**

FY19 revenue up 39%

Digital Marketing & Events

 **36.8m**

FY19 revenue up 15%

English Language Teaching

 **27.5m**

FY19 revenue up 24%

Delivering the Platform

The foundations for growth



World's best course search

28 IDP and 12 Hotcourses International sites connected into platform

Leading office network

9 new offices, taking the total number to 127 offices in the student placement network

Global contact centre

Live in 18 countries

Digitising student expos

115,000 students attended events in FY19

Virtual Agency

55,000 leads from China and India virtual agency in FY19

Leading CRM and CMS

2,500 counsellors and teams connected

Student Essentials

Almost 20,000 services sold in FY19

Career support

Pilot internship program launched

**Growing the definitive dataset for international education.
Enabling data-driven insights and engagement.**

Platform Engagement

Increased pipeline and applied leads



40

Connected international websites



30%

Increase in IDP web traffic



37%

Increase in hot/warm student online leads



27%

Increase in event attendance



36%

Increase in contact centre leads moving from unqualified to qualified



11%

Decrease in cost per hot/warm lead



33%

Increase in applied volumes



- Students placed into a record number of courses
- Recognised as a world leader when named global Education Agency of the Year at the PIONEER Awards



Student placement highlights

- Expanded our office network in Nepal, Pakistan, India and Canada
- Double digit volume growth across all five key study destinations - Australia, Canada, New Zealand, United Kingdom, and the United States
- 117% year on year revenue growth for new value adding services

IELTS™

- Record test volumes in FY19
- Organic expansion of IELTS network to markets of Ireland, Poland, Peru and Chile.



Computer-delivered IELTS highlights

- 147 new centres launched
- Available in IDP centres across 46 countries
- Faster results, more test availability



- New B2B division of IDP is helping institutions achieve their marketing and recruitment goals



Digital marketing and events highlights

- Completed the integration of the Hotcourses Group into the business as IDP Connect
- New content services helping students move from enquiry to application
- Clients using Content Hub service 83% more likely to receive an enquiry

Building Capability


Global strategy

- Built new team through FY19
- Leading the global strategy
- Setting digital cadence

 Chief Digital Marketing Officer

 Global Content Strategy

 Data Analysis

 Customer Experience Leads

 Multimedia Design

Powered by a centralised digital capability

- Almost 400 staff coming together
- Building a Digital Campus
- Based in Chennai

 Design

 Development

 Testing

 Customer Support



Regional delivery

- Replicated structure in five regions
- Delivering localised strategy
- 40 specialist hires in FY19



Regional Marketing Director



Contact Centre



Marketing Automation



Content Strategists



Search Engine Optimisation



Australia opens its doors to international students, and IDP leads the way

IDP opens Singapore, its first office specifically to support student placement activities

Foundations established for future growth

1969

1981

1986

1987

1989

1992

1996

2006

2010

2011

2012

2015

2016

2017

2018

2019

The early days...
An aid organisation

Brand IDP introduced

Establishes the Australian Centre for Education

Becomes wholly owned by 38 Australian Universities

SEEK acquires 50% shareholding

IDP converts from 'not-for-profit' to 'for-profit' status

Introducing the American Dream - more choices for students

IELTS launches and redefines English language testing

The global platform build begins

Acquires the Hotcourses Group

Launches computer-delivered IELTS

Celebrates 30 years of bringing the industry together

Extends multi-destination strategy into the United Kingdom and Canada

Lists on the Australian Securities Exchange

Extends multi-destination strategy into New Zealand

Extends multi-destination strategy to Ireland