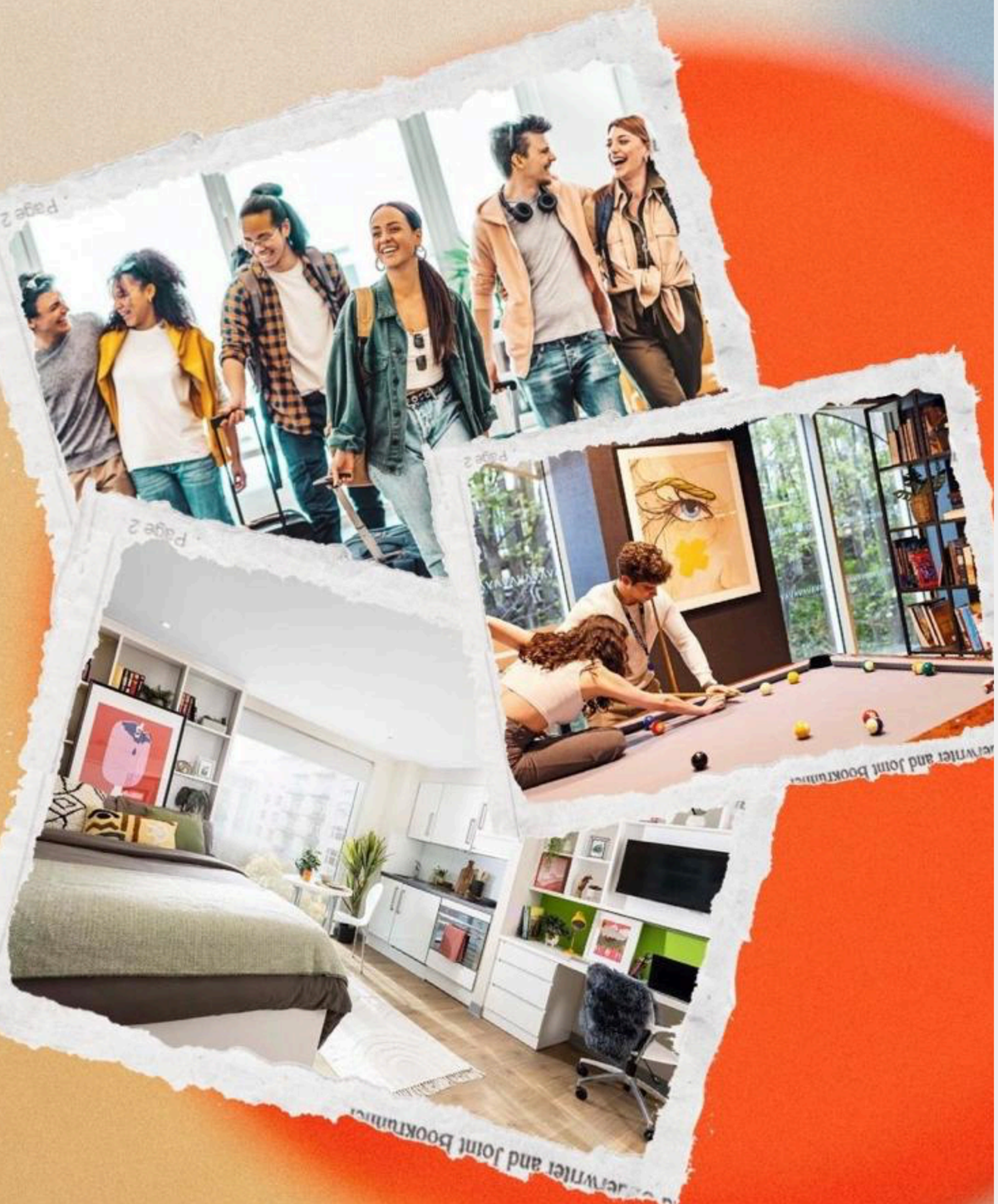
Group Bookings Institutional Performance Report (Last 2 Years)



Agenda

Topics covered

- Executive Summary
- Role of Institutions in the Portfolio
- Institutional Partner Types
- Top 10 Institutions by Overall Impact
- Deep Dive: API Abroad
- Other Key Institutional Partners
- Institutional Seasonality & Channel Insights
- Strategic Recommendations
- Key Takeaways

Executive Summary

Over the last two years, institutional group bookings have formed a high-value, strategically important pillar of the portfolio. While booking platforms generate the highest volume of transactions, institutions deliver fewer but larger, longer-stay, and more brand-visible groups.

Within this institutional landscape, API Abroad clearly emerges as a key strategic partner, with multiple group bookings across the period and a strong combination of volume and value. Alongside API Abroad, University of Westminster, Bayswater College, St Giles International, Bell London, Malvern House, Frances King, The London School of English, Istituto Marangoni, Coventry University, Speak Up London, Staywise, Omnes Education, Hult International Business School, and UCL form a robust institutional portfolio.

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Key performance indicators

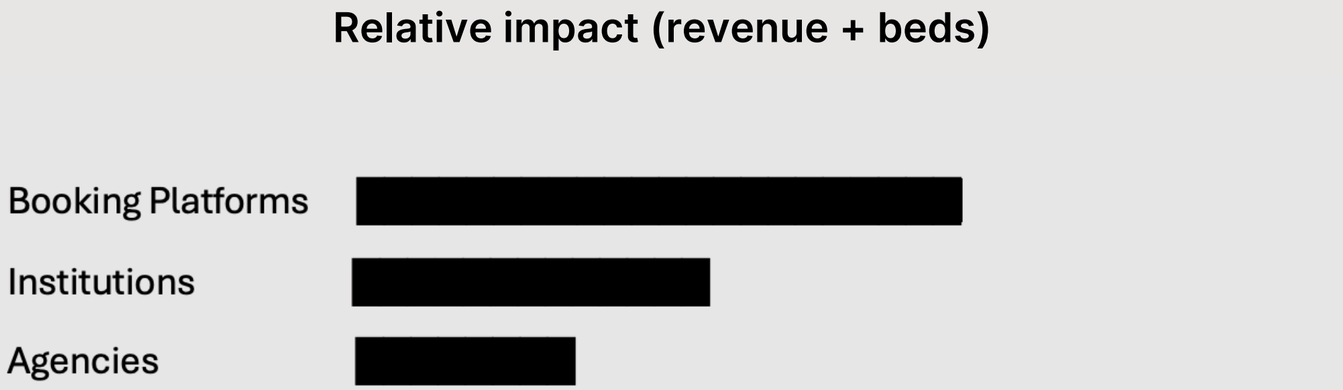
- API Abroad is the most significant institutional partner by overall impact (beds + revenue feel), with multiple groups and a strong 2026 pipeline.
- University of Westminster delivers very high-value, long-stay academic groups, anchoring the institutional portfolio.
- Bayswater College and St Giles International show healthy repeat patterns, especially in summer and early-year periods.
- Language schools and specialist institutions (The London School of English, Bell London, Frances King, Speak Up London, Hult, Istituto Marangoni, etc.) provide diversified, often shorter-stay but high-quality groups.
- Payment behaviour across institutional groups is strong, with the vast majority of large invoices marked as Paid, and only small residual balances on a few accounts.

2. Institutional portfolio overview

2.1. Role of institutions in the overall mix

While booking platforms dominate in number of invoices, institutions contribute disproportionately to total revenue and brand value. Institutional groups tend to:

- Stay longer (often several weeks to months).
- Book larger blocks of accommodation.
- Be associated with academic programmes, language courses, or structured experiences.



Institutions sit in the middle in terms of volume, but high in terms of revenue per booking and strategic value.

Table 1 – Examples of institutional partners by category

Category	***Examples***
Academic universities	University of Westminster, Coventry University, Omnes Education, UCL
Language schools	Bayswater College, St Giles, Bell London, Frances King, LSE, Speak Up London
Specialist schools	Istituto Marangoni, Hult International Business School, API Abroad,
Cultural/experience	The British Museum (group), Staywise, Burlington School of English

2.2. Institutional partner types

This mix provides a balanced institutional portfolio, combining long-stay academic groups with shorter, intensive language and cultural programmes.

3. Top 10 institutions

The following ranking is based on overall impact—a combination of:

- Number of group bookings
- Accommodation_count (beds)
- Invoice amounts
- Strategic and repeat value

Text-based chart – Top 10 institutions by impact

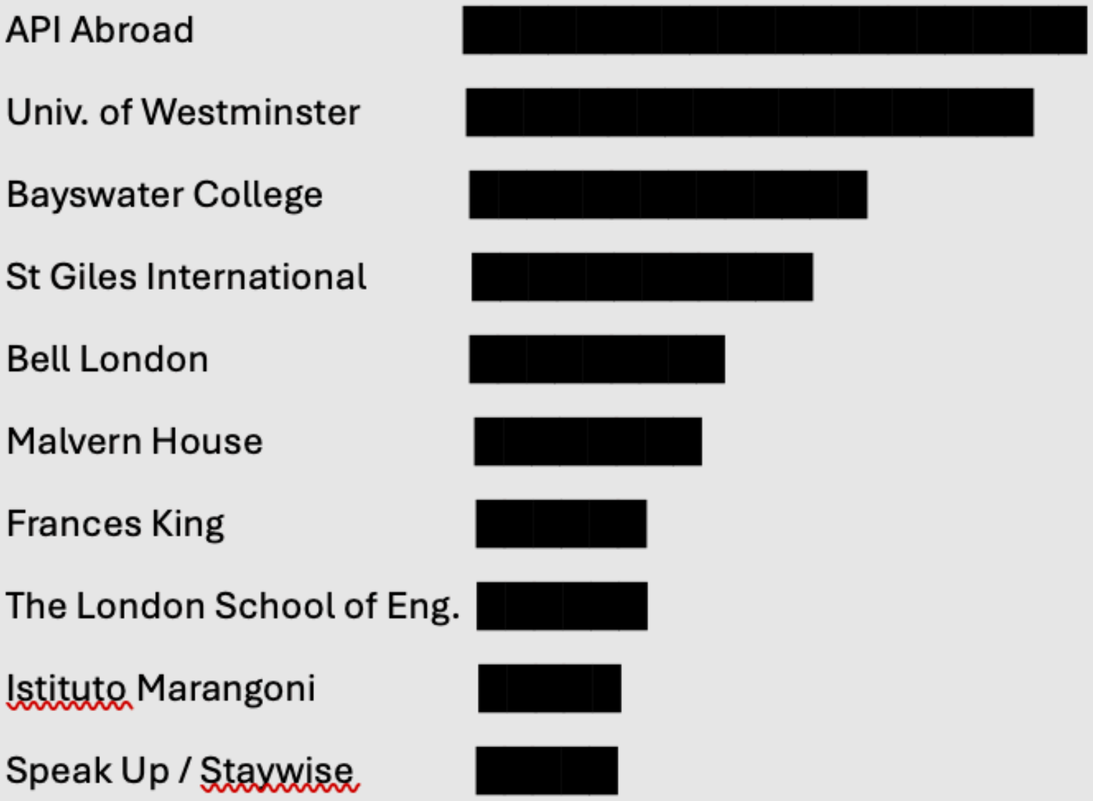


Table 2 – Top 10 institutions (overall impact)

Rank	Institution	Overall impact (qualitative)	Key notes
1	API Abroad	Very high	Multiple groups, strong 2025 & 2026 presence
2	University of Westminster	Very high	Two very large, long-stay groups (2025 & 2026)
3	Bayswater College Limited	High	Multiple groups across 2025–26
4	St Giles International	High	2025 & 2026 groups, repeat partner
5	Bell London / Bell English	Medium-high	Significant 2025 group (33,600) + other bookings
6	Malvern House	Medium-high	Multiple institutional bookings (including group in 2024–25)
7	Frances King School London	Medium	24-bed group, fully paid
8	The London School of English	Medium	Several smaller but recurring groups
9	Speak Up London / Staywise	Medium	Multiple bookings, including institutional and group stays
10	Istituto Marangoni School	Medium	Smaller but growing institutional presence

API Abroad and University of Westminster clearly sit at the top of the institutional.

API Abroad appears multiple times across the last two years as an Institution, with:

- A large, long-stay group in early 2025 (invoice around £68,880.00).
- Additional groups in 2025 with 16, 14, 8, and 5 beds.
- A 2026 pipeline group (API Group One) with a value of £41,802.84.

Text-based chart – API Abroad institutional volume (beds feel)



API Abroad is therefore the single most important institutional partner by combined bed volume and revenue feel.

2.3 Seasonality

API Abroad's groups tend to cluster around:

- Spring to early summer (February–June)
- Academic term periods rather than purely peak tourist months

This aligns with study abroad and academic programme cycles, making API Abroad a predictable, repeatable source of institutional demand.

2.4 Strategic importance

API Abroad is strategically important because:

- It delivers high bed volume and high revenue per booking.
- It operates as a bridge between international students and the institution, often bringing cohorts year after year.
- It appears in both current and future periods, indicating ongoing partnership strength.

Table 3 – API Abroad key bookings (illustrative)

Period Invoice	Invoice	amount	Notes
Early 2025	#32645	£68,880.00	Large, long-stay group
Mid 2025	#34735	£12,800.00	14.05.2025 – 28.05.2025
Mid 2025	#34647	£11,676.00	07.06.2025 – 20.06.2025
Mid 2025	#36506	£0.00	Internal/zero-price invoice
Early 2026	#41900	£41,802.84	API Group One, 01.02.2026 – 20.06.2026

The revenue profile is robust, with multiple five-figure invoices and long durations.

3. Other key institutions

3.1. University of Westminster
- Two major group bookings:
- 2025: ~£84,960.00 (20 beds, long-stay).
- 2026: ~£92,760.00 (20 beds, partially paid).

- These are flagship academic groups, with long durations and high revenue.
- Westminster should be treated as a core academic anchor partner.

3.2. Bayswater College Limited
- Multiple institutional bookings across 2025–26:
- 10-bed group (2025).
- Additional 4-bed and 2-bed groups in 2025–26.

- Mix of summer and off-peak stays.
- Strong potential as a repeat language school partner.

3.3. St Giles International
- 2025 group (~£7,125.00, paid).
- 2026 group (~£18,280.00, paid).
- Clear repeat pattern, with potential to grow into larger cohorts.

3.4. Bell London / Bell English
- Significant 2025 group (~£33,600.00).
- Additional smaller institutional bookings.

3.5. Malvern House
- Institutional bookings in 2024–25, including:
- 23-bed group (~£26,013.00).
- Smaller follow-up groups.
- Good mid-size institutional partner with room to grow.

3.6. Frances King School London
- 24-bed group (~£16,800.00, paid).
- High-quality language school with solid group size.

3.7. The London School of English
- Multiple smaller institutional bookings (2-bed groups).
- Appears across both years, indicating steady, recurring demand.

3.8. Istituto Marangoni School of Fashion
- Institutional bookings with specialist, high-value programmes.
- Mix of institutional and group bookings, including 2-bed groups and higher-value stays.
- Strong brand association and potential for premium pricing.

3.9. Coventry University
- Institutional group (~£7,556.57 equivalent) in 2025–26.
- Academic partner with potential for repeat summer or term-time groups.

3.10. Speak Up London

- Institutional group (~£2,730.00) in 2025–26.
- Smaller but growing language school partner.

3.11. Staywise

- Institutional bookings (e.g. 3-bed and 2-bed groups).
- Good example of experience-oriented institutional partner.

3.12. Omnes Education Business School

- Institutional group (~£9,095.00) in 2025–26.
- Business-school-oriented, with potential for short, intensive programmes.

3.13. Hult International Business School

- Institutional booking (~£14,105.69).
- Premium business school, likely to attract high-value, short-stay cohorts.

3.14. UCL

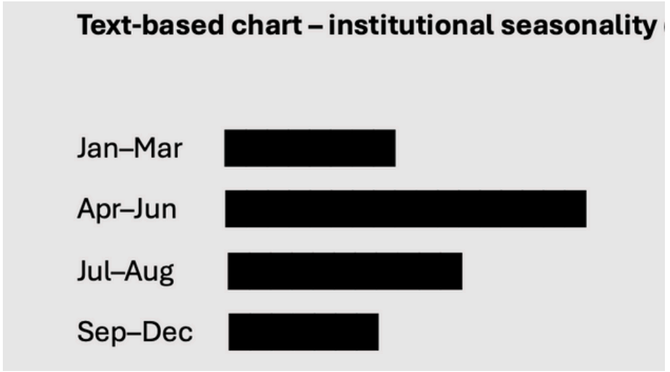
- Institutional booking (~£1,447.57).
- High-prestige academic brand; even small groups are strategically valuable.

4. Channel & seasonality insights for institutions

4.1. Seasonality of institutional groups

Institutional groups show clear seasonal patterns:

- Spring–early summer (Feb–June): Heavy presence of API Abroad, Westminster, language schools, and academic cohorts.
- Summer (July–August): Mix of language schools (Bayswater, St Giles, Bell, Malvern House) and specialist programmes.
- Autumn–winter (Sept–Dec): Fewer but still notable groups, often linked to longer academic terms



4.2. Institutional vs other channels

Institutions differ from booking platforms and agencies in that they:

- Plan further in advance.
- Require more structured coordination (academic calendars, group leaders, visas).
- Are more likely to repeat annually if satisfied.

This makes them ideal for long-term capacity planning and revenue predictability.

5. Strategic recommendations

5.1. Build a formal “Key Institutions” programme

• Define a top-tier list:
API Abroad, University of Westminster, Bayswater, St Giles, Bell, Malvern House, Frances King, The London School of English, Istituto Marangoni, Coventry, Speak Up, Staywise, Omnes, Hult, UCL.

• Create joint planning cycles (e.g. annual review in Q3 for the following academic year).

5.2. Anchor academic partnerships around Westminster & similar universities

• Treat University of Westminster as a flagship academic partner.
• Identify 2–3 additional universities that could follow a similar model (e.g. Coventry, Omnes, UCL).
• Offer custom reporting and feedback loops to academic partners.

5.3. Grow language school clusters

• Build clusters around:
• Bayswater, St Giles, Bell, Malvern House, Frances King, Speak Up, The London School of English.
• Offer group-friendly packages (e.g. fixed weekly rates, activity bundles).
• Encourage off-peak bookings with targeted pricing.

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Thank you