Wands, Spells, and Magic Pills:
The Lingo of Language Learning Products
Gabriel Guillén & Sarah Springer
Middlebury Institute of International Studies #Callicoco2016
● We believe language startups, publishers, organizations, researchers, instructors, and beneficiaries...

● We have a strong interest in Social Entrepreneurship (theory, practice, and pedagogy)

● We have a background on Language Learning & Technology

● We are also concerned and frustrated with the lingo of some language startups

● We are worried about the energy of the industry and the outsider perspective...

● Why found 207 websites for learning Spanish back in 2002...

● Who found 300 language learning startups on angel.co 4 months ago...

● We wanted to connect with the work of Cruz-Piñol...

● We have a strong interest in Social Entrepreneurship (theory, practice, and pedagogy)

● We have a background on Language Learning & Technology
● Why

Social entrepreneurs target social problems...

(Mair & Marti, 2006, p. 36)

"A process that catalyzes social change and addresses important social needs in a way that is not dominated by direct financial benefits for the entrepreneurs."

Let's use this one:

There are many different definitions of SE.

Do we have or need Language Learning Social Entrepreneurship (SE)?

We have Language Learning Entrepreneurship

Are we in the same boat?
Why

How

Data

Takeaways

Next steps

This is a work in progress...

Two datasets

● Two datasets:
  ○ Deeper exploration of 72 most active startups
  ○ Analysis of 404 startup one-line mission: http://go.miis.edu/startups

What do they say about learning, teaching, and language? What do (they say) they sell?

Frequent keywords, clusters, trends, and assumptions about language learning

Skills (vocabulary building, grammar accuracy, pronunciation training, spontaneous speaking, writing, scaffolding input for receptive skills)

Language taught

Frequent words, clusters, trends, and assumptions about language learning

Startups traits: founder background, fundraising, price... Position in the SE continuum

● This is a work in progress...
From 300 to 404 companies today!

$3.8M average valuation

74 jobs right now...

... most of them "tech" jobs

$80-100bn Market

404 companies today

From 300 to...

Language Learning Startups

Data > Takeaways > Next steps

Why > How
Just in May...

- 7 new projects
- And today is only May 13...

Just in May...

- With 7 new projects
Like a native speaker:

through conversations – we teach you how think and behave

At michi, we’re not just in the business of teaching Chinese

Your on-demand Chinese friend.
404 startups

- On the shoulders of Duolingo...
  - Travelingo (2016): Affordable Rosetta Stone + Babbel for Travellers
  - The World Phone (2013): Rosetta Stone + Chatroulette
  - Language Trends (2014): 2x better than Rosetta Stone
  - Flashcard Tree (2012): A Rosetta Stone that works
  - Top40Town (2012): Rosetta Stone meets FarmVille

- On the shoulders of Rosetta Stone...
  - Language Trends (2014): 1.5x better than Duolingo
  - Click and Study (2014): Duolingo for long-term education
  - Montalbano (2013): Duolingo for accent training
  - Pili Pops (2011): Duolingo for kids

404 startups
404 startups

- Want to be Airbnb (2), Kayak (1), Instagram + Quora (1)
  - Colingo (2011): Airbnb for English-teaching
  - Italki (2011): Airbnb + community for language teachers and students
  - Interlinguals (2016): Aims to become the Airbnb for language learning
  - Tutlo (2012): Private online language tutor; Uber for Languages
  - Ediket (2014): Uber for Editing
  - Odex (2013): Uber for I:1 Language Tutoring
  - Goji (2016): Uber for ESL

- Want to be Uber
  - Tutlo (2016): Uber for 1:1 Language Tutoring
  - Ediket (2014): Uber for Editing

- Want to be Expedia (2), Kayak (1), Instagram + Quora (1)

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**Next Steps**

*Data > Takeaways > Next Steps*
Why > How > Data > Takeaways > Next steps

404 startups

Lexical frequency: easy, global, live, fun, social language learning platform or app

...through video or games

Concordia - Not so Pretty cousin of Worde
<table>
<thead>
<tr>
<th>City/Region</th>
<th>Number of Startups</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>26</td>
</tr>
<tr>
<td>San Francisco</td>
<td>25</td>
</tr>
<tr>
<td>London</td>
<td>22</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>10</td>
</tr>
<tr>
<td>Singapore</td>
<td>(5)</td>
</tr>
<tr>
<td>Tokyo</td>
<td>(5)</td>
</tr>
<tr>
<td>Moscow</td>
<td>(8)</td>
</tr>
<tr>
<td>Madrid</td>
<td>(6)</td>
</tr>
<tr>
<td>Shenzhen (Santiago, Valencia</td>
<td>(4)</td>
</tr>
<tr>
<td>Medellin, Vancouver, Taipei</td>
<td></td>
</tr>
<tr>
<td>Tokyo, Singapore</td>
<td></td>
</tr>
<tr>
<td>Los Angeles, Boston, Seoul</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>London (Z2)</td>
<td></td>
</tr>
<tr>
<td>New York (26)</td>
<td></td>
</tr>
<tr>
<td>San Francisco (25)</td>
<td></td>
</tr>
</tbody>
</table>
Emphasis on spontaneous speaking and vocabulary building

Plenty of variation

72 most active startups
72 most active startups

<table>
<thead>
<tr>
<th>Language</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>35.7%</td>
</tr>
<tr>
<td>Chinese</td>
<td>4.3%</td>
</tr>
<tr>
<td>Spanish</td>
<td>3%</td>
</tr>
<tr>
<td>Multiple languages</td>
<td>36%</td>
</tr>
</tbody>
</table>

- Emphasis on multiple languages and English
<table>
<thead>
<tr>
<th>Type</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid</td>
<td>0.7%</td>
</tr>
<tr>
<td>Free</td>
<td>0.9%</td>
</tr>
<tr>
<td>Premium</td>
<td>0.8%</td>
</tr>
<tr>
<td>Total</td>
<td>1.4%</td>
</tr>
</tbody>
</table>

Most of them are not free.
72 most active startups

Founders' background: technology and finance, for the most part
Why > How > Data > Takeaways > Next steps

"Language exchange is a concept that millions of people already practice, though most of it happens through sites like Craigslist, local forums, or meetup groups."

"Marketing spells language exchange for one billion bright young minds."

"Our platform will disrupt the billion dollar language education industry and relieve the pain of language-learning for one billion bright young minds."

"We believe that the only way to disrupt the $56 billion language learning market is to make language practice at home as easy as playing Cut the Rope or Fruit Ninja."

"The most quantifiably effective way to teach a foreign language is through language exchange."

"...on a mission to fix broken English around the world."

"...the most brain-engaging product and probably the most unashamedly cheery, of learning products."

72 most active startups
What do they say about learning?

- Wands, spells, and magic pills
- "Two weeks of full immersion can give you the same progress than 6 months of studying a foreign language at home"
- "...helps you remember everything you want to learn, with a minimum and seamless investment of your time"
- "...upgrades trips for business and leisure travelers by making it easy and fun to learn the local language and culture by providing customized relevant phrases..."
- "...helps you remember everything you want to learn, with a minimum and seamless investment of your time"
Why > How >

Data > Takeaways > Next steps

72 most active startups

●

specific solutions (caveat: pedagogical lingo does not necessarily imply a pedagogically sound tool)

What do they say about learning?

> pronouciation feedback

Founded by two internationally-minded Oxford and Harvard graduates, Edulit is a bootstrapped edutech startup that combines innovative technology with tried-and-tested pedagogical methodology and "our live, social school blends live group classes, great American teachers, a structured curriculum, learning through collaborative exchanges, and learning through curriculum-guided online exchanges". "An iPhone game that connects language learners so they can have real conversations with students from all over the world."

"Our live, social school blends live group classes, great American teachers, a structured curriculum, learning through collaborative exchanges, and learning through curriculum-guided online exchanges". "An iPhone game that connects language learners so they can have real conversations with students from all over the world."

○
Specific solutions

What do they say about learning?

72 most active startups

Language

Because instead of translating or memorizing flashcards, you are solving problems directly in the new language. Delivering it to users...

... helps busy people to learn languages by breaking down learning into digestible "bites" and progressively growing intervals so that they are effectively retained in long term memory.

The key pedagogical driving force is the spaced repetition algorithm - words are practiced over context in which they are used...

English lessons. This is achieved by capturing all the new words which learners encounter and then giving them exercises with their own words so that they remember not just the words but also the context in which they are used.

We take interesting, bite-sized video clips, ranging from pop songs to TED talks, and turn them into specific solutions.
Why > How > Data > Takeaways > Next steps

**72 most active startups**

- **What do they say about teaching?**
  - Wands, spells, and magic pills
  - "...instead of trudging through a boring classroom lesson, you can make new friends while learning by..."
  - "...disrupts traditional language lessons, which are artificial and awkward, and leads to..."
  - "...the 3 reasons traditional language education fails to engage language students: (1) they are not motivating enough, (2) they teach the wrong materials, and (3) they do not expose people to the real thing."
  - "...tutors get to make money helping people from around the world practice English, instead of boring, generic, and old-school pedagogy in education and nursing in our head..."
  - "...attacks boring, generic, and old school pedagogy in education and nursing in our head..."

This combination disrupts traditional language lessons, which are artificial and awkward, and leads to...
Why > How > Data > Takeaways > Next steps

72 most active startups ○

What do they say about teaching?

- "The average student rating of a teacher is 4.9/5" ○

Specific solutions

- Our multiplayer games pair learners with others learning their same target language and pair users with natives and experts of their target language, "Your tutor is a waiter" scene. For example, in the restaurant scene, "You can roleplay with a live tutor in 6 scenes. In each scene, your tutor roleplays as a character in the role of a character in the scene. For example, in the restaurant scene, your tutor roleplays as a waiter."

- Essay writing, and debate

- "Our vision is to build a series of apps that teach specific skills to students such as peer editing, viping, standards-aligned courses to discover other cultures, learn about global issues, and practice..." ○

- "This video-based platform includes innovative tools for detecting and improving accents" ○

- IT's video-based platform includes innovative tools for detecting and improving accents. "The average student rating of a teacher is 4.9/5" ○
What do they say about language?

- "...lets the world learn to speak real English - from real people."
- "When you can speak another language, your world becomes bigger, richer and more inspiring."
- "The culturally rich experience of connecting with a teacher living in the Spanish-speaking world."
- "...Our application is available on your phone anywhere and doesn’t require the time or money investment that fluency requires."

72 most active startups
Learning and teaching (caveat: this is not surprising giving the source of our study)

Not many of the founders have a background or strong experiences with language

Still, a lot of the language used aligns with the magic pill approach (be fluent in 2 weeks)

Still, a number of projects are no longer working

The niche solution approach (Uber, AirBnB for languages). The niche solution

There are very innovative and specific tools and spaces, beyond the “unicorn”, disruptive

Focus on connecting students with “expert” speakers

Pivotal, today, many of these products (tools, spaces) focus on spontaneous talk

In 2002, only 4 of 207 sites allowed oral production, merely “sending your voice” (Cruz-Piñol).

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Ideal team: Content + Pedagogy + Business + Design + Engineering
Do they care about language learning?
Are they mission-driven?
There is a gap... There are synergies...
Between startups (Duolingo...), publishers (Pearson...), federally funded projects (NFLRCs...), innovators in academia (Todd Bryan, Jeff Magoto...) and instructors. We are not free!
This is an opportunity for social entrepreneurship.

Why > How > Data > Takeaways > Next steps
There is a space for mission, impact driven language learning startups

- Truly addressing an important social need
- Using honest, pedagogically sound language
- But the magical, transformative, lifelong experience of language learning
- Not the magic pill, the shortcut, the misleading spells of the language hacker, the crooked wand of Harry Potter
- There is a space for mission, impact driven language learning startups
Next steps

- Develop a Social Entrepreneurship SIG for Learning Startups
- Social impact metrics for Language Learning Startups
- A Social Entrepreneurship SIG
- SE Continuum

Lingo decoder for Language Learners

Which tool or space should I use if...

- I want to improve my pronunciation in English?

Complete the analysis of these +400 startups... Collaborative