



Homestay 2.0: Rethinking Homestay Services for the Future

Languages Canada
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Depth of Experience

52% of CHN students are minors



Breadth of Experience

>72,000 Students Served



Credentials

23 Years as a Family Business



Purpose

+

Not for Profit
Education & Collaboration



Outline



Homestay 1.0: value proposition + compensation



Agent survey results: value proposition + perceptions



Homestay 2.0: 'real' benefits of homestay + strategies for the future

“We need your special care of our young children and solve the problem between them urgently.” - Korea



Outcomes

- Understand what homestay offers when it's operating at its best
- Review premise for expanding international agents' understanding of the value proposition
- Discuss marketing homestay as more than just accommodation
- Re-establish and re-capture Homestay's potential to keep Canada at the forefront of the future of international education

*“Homestay will give the student to get to know the culture in the best way. Sometimes the host and the students become family. They teach each other things and spend some time together. **I think it is the best way to overcome prejudices to other cultures and life styles.**” - Turkey*



Survey

- www.Menti.com
- Code 11 10 36





Homestay 1.0: Traditional Value Proposition

“... A Homestay is more than renting a room; host families are prepared to welcome students as **members of the family** and are eager to assist in learning **English** and sharing Canadian **culture**... we often know the families on the Homestay list personally.”

“Students ... find the overall educational and travel experience is enhanced through **daily conversation** and **involvement** with their host families. Homestay provides an environment that is **safe** and **caring** and your homestay family will help you to **adjust** to your new experience while in Canada.”

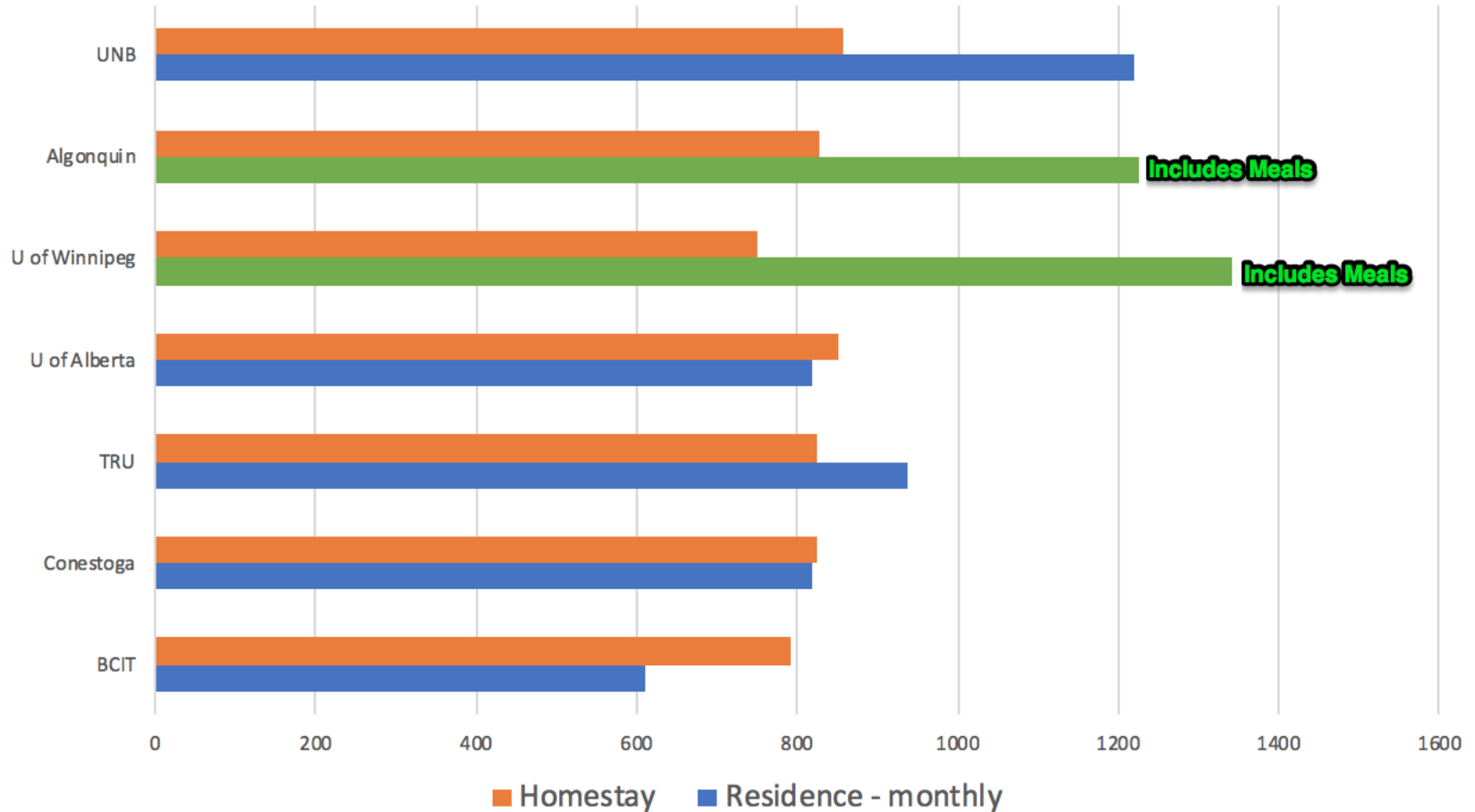
“We consider the best way to enhance **English** language study is through after school practice with the host family. A host family typically plays an important role in helping the student **adjust** to Canadian life. As much as possible, the student is included in the **family** unit.”

“You have the opportunity to experience Canadian **family** life first-hand, learn Canadian **traditions**, improve your **English** and make lasting **friendships**.”



Homestay 1.0: Traditional Value Proposition

Examples of Residence vs. Homestay Across Canada (Uni + College)





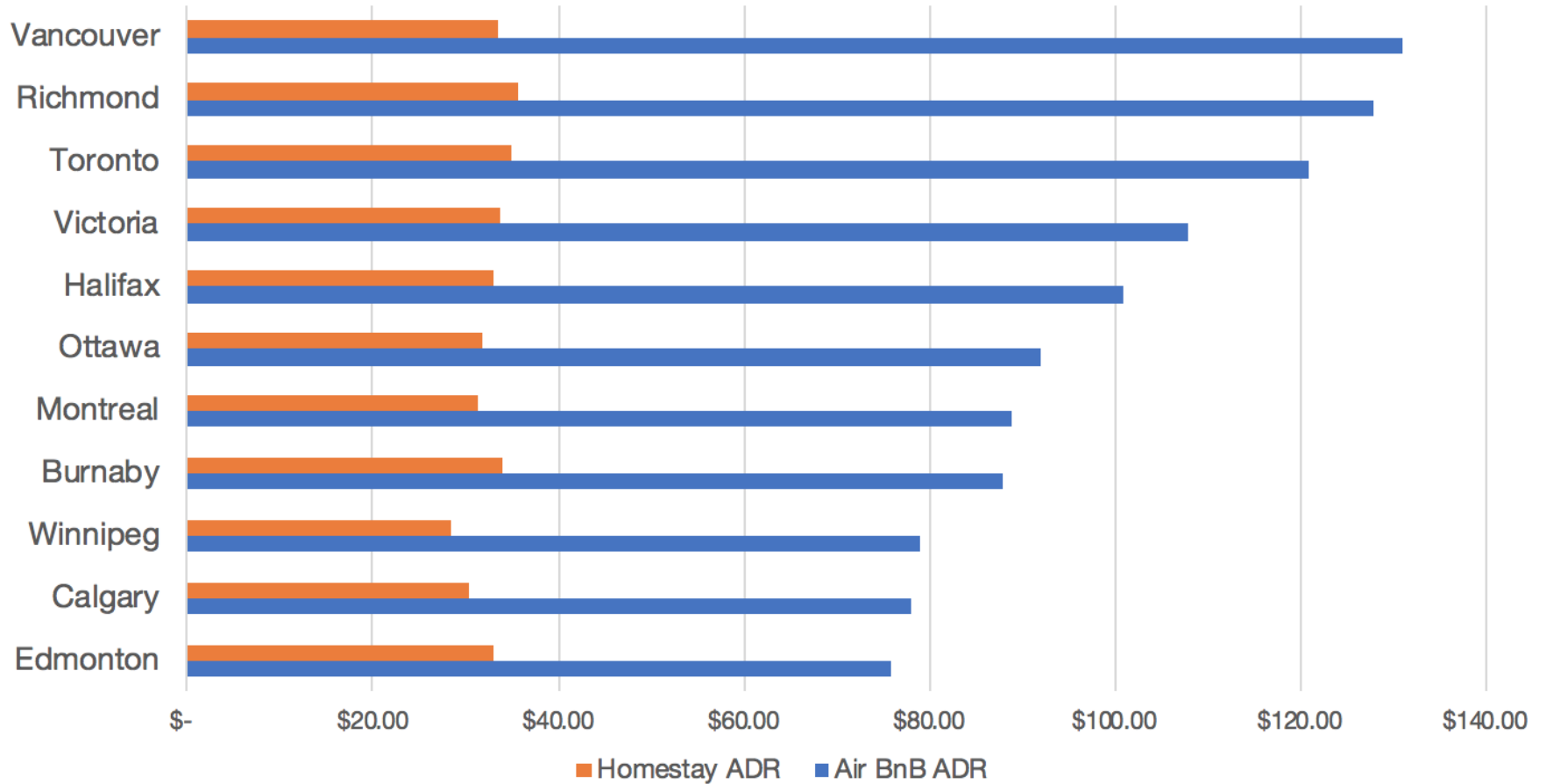
Homestay 1.0: Value Proposition Mindset

Residence	Off-campus	Homestay
1- or 2-semester commitment	leases	1 month minimums, sometimes less
Application deadlines to guarantee place	Market-driven supply/demand pressure	Unlimited capacity
Meal plans often not included in pricing	Nothing included in pricing	All-inclusive pricing
Emphasis on location, safety, supervision	Usually hands off, self-serve, no liability	Mixed messages
Quality guarantee	No guarantee	Satisfaction guarantee = relocation
Smooth, fast, easy	Variable	Complicated
Professional service providers	Variable	Mixed messages
Neutral?	Unavoidable liability	Cost, stress, turnover, risk
“Housing”	“Housing”	“Housing”



Homestay 1.0: Average Daily Rates

Source: AirDNA.com and HomestayFinder.com

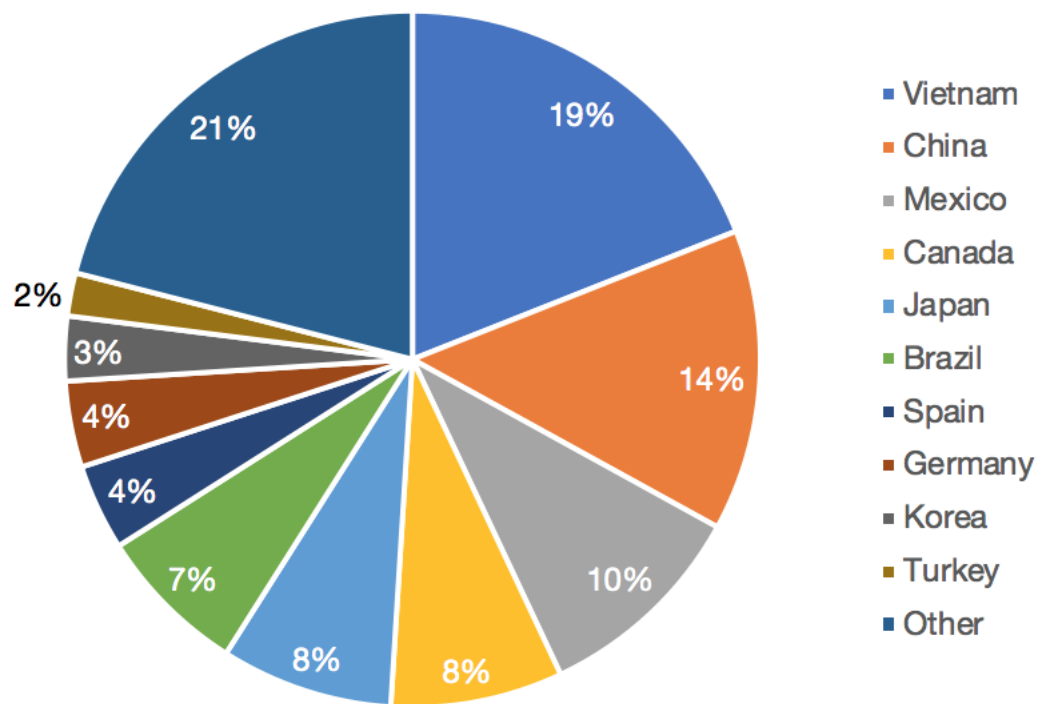




Agent Survey

- September 28 to October 15, 2018
- 12% response rate (576/4845)
- +/- 3.83% confidence level, 19 times out of 20
- Average work experience: 9 years (50% over 6 years, 50% under 6 years)
- Average # of students per year in homestay: 124 (50% under/over 30)

Agency Nationalities

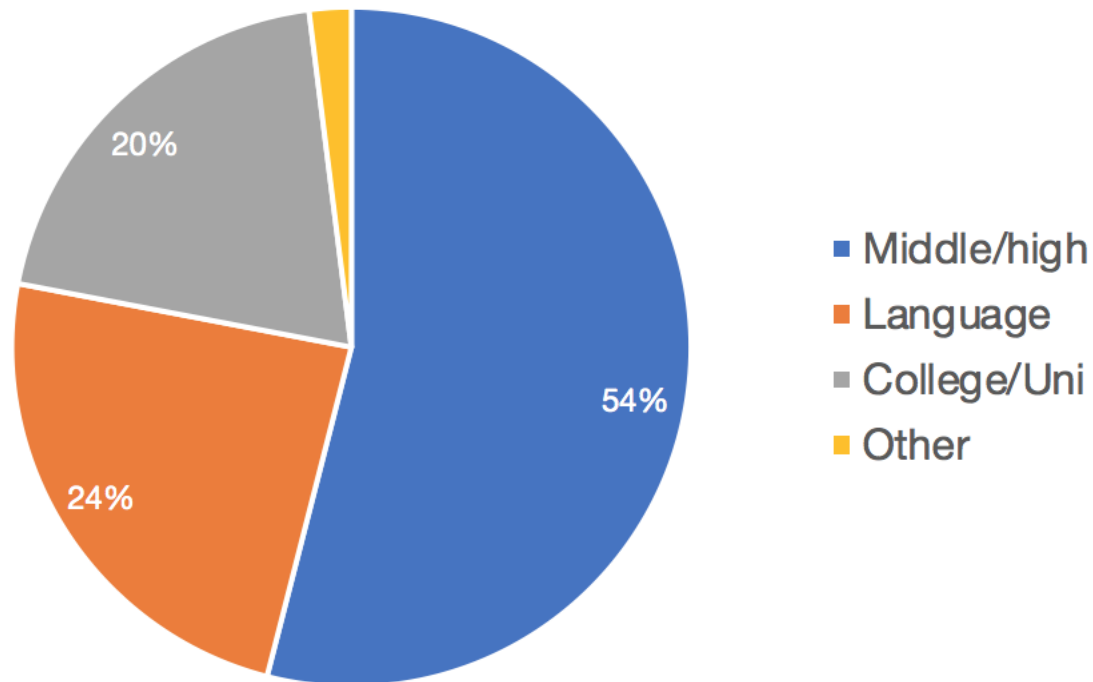




Agent Survey

Approximately what percentage of students do you place in homestay, by category?

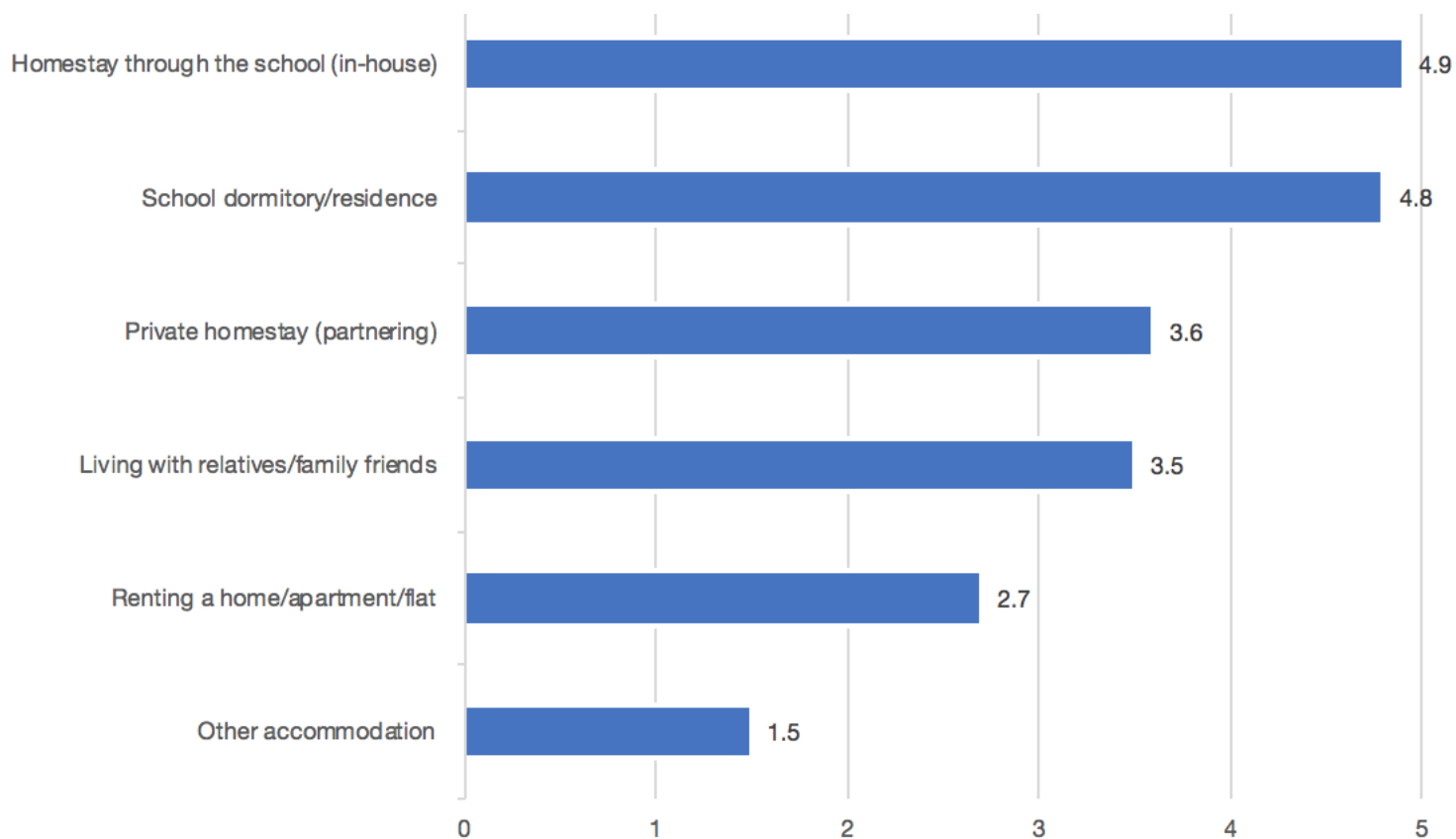
Homestay Placements by Category





Agent Survey

Please rank the following accommodation options in order of your preference

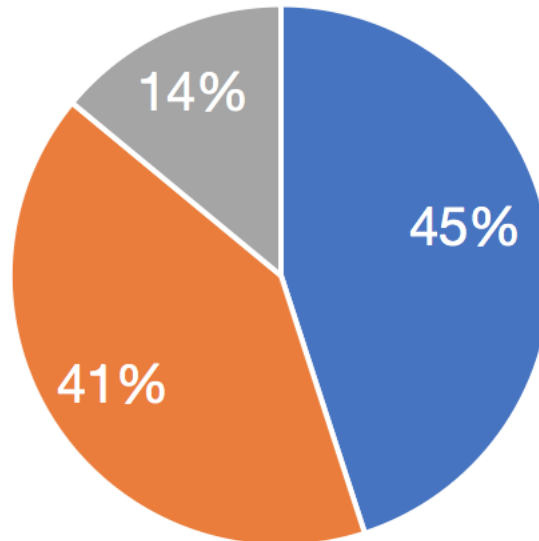




Agent Survey

In general, do you prefer when a school/district runs its own in-house homestay service, or do you prefer when the school uses an independent homestay organization/company?

In-house vs Partnering Homestay



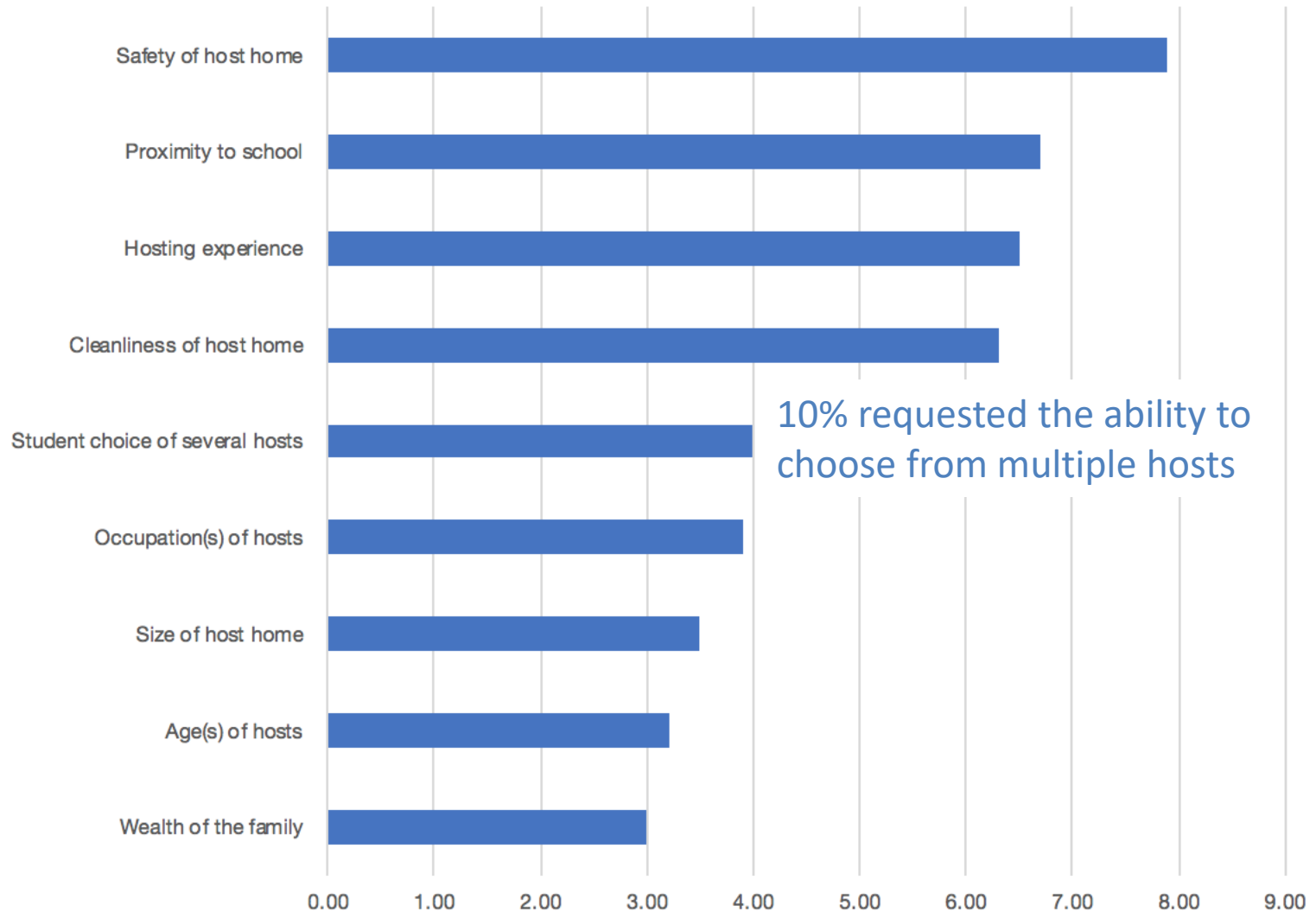
- I prefer homestay programs run by a district/school
- I have no preference/it depends/it varies
- I prefer homestay programs run by independent organizations/companies



Agent Survey

- ✓ Safety
- ✓ Location
- ✓ Host Experience
- ✓ Cleanliness

Please rank all of the following qualities of homestay in order of importance.

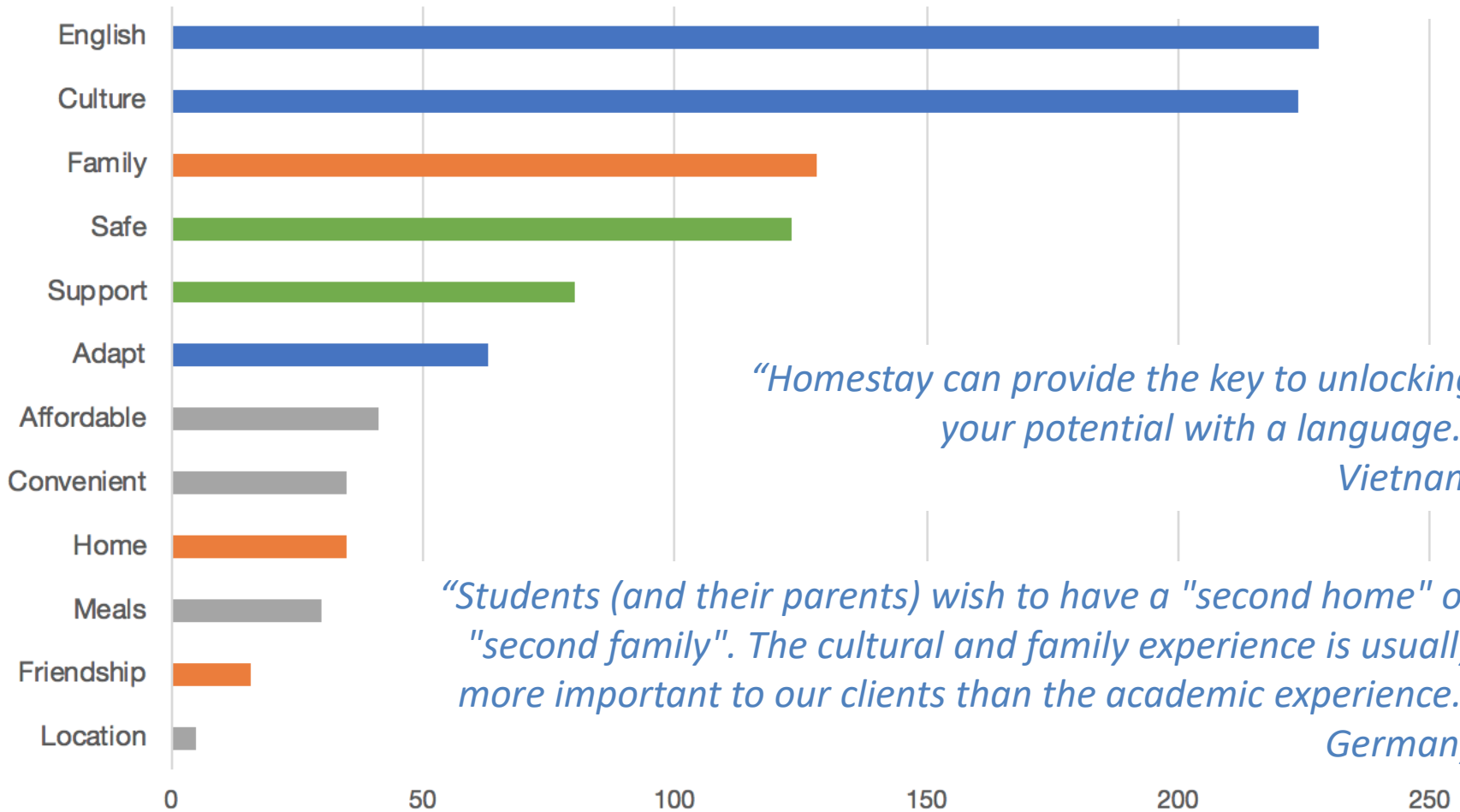




Agent Survey

- ✓ Immersive Experience
- ✓ Family, host quality
- ✓ Safety
- ✓ Relationship with school
- ✓ Convenience

What are the biggest benefits of homestay?



*"Homestay can provide the key to unlocking your potential with a language."
Vietnam*

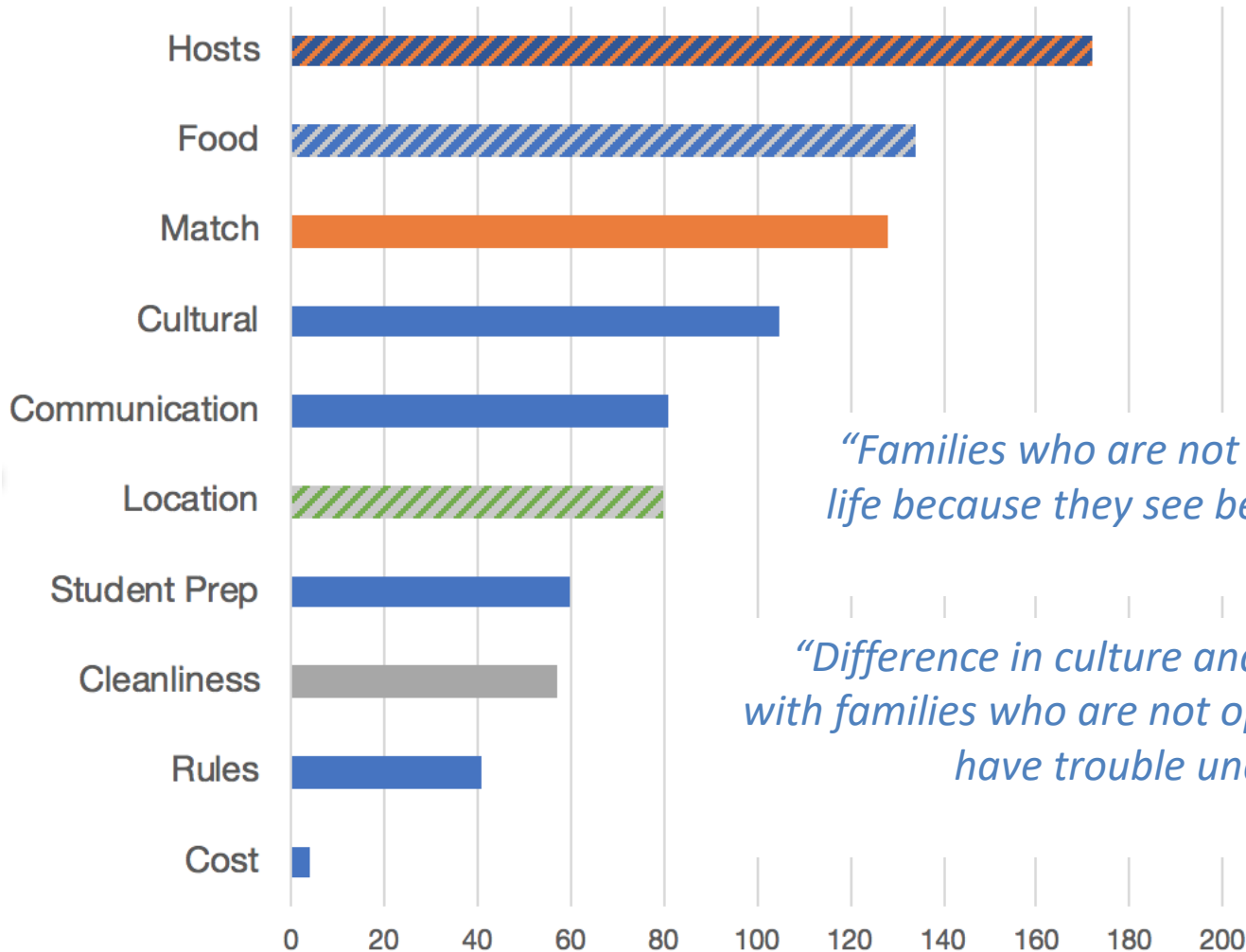
*"Students (and their parents) wish to have a "second home" or "second family". The cultural and family experience is usually more important to our clients than the academic experience."
Germany*



Agent Survey

- ✓ Immersive Experience
- ✓ Family, host quality
- ✓ Safety
- ✓ Relationship with school
- ✓ Convenience

What are the biggest problems of homestay?



"Families who are not involved in the student's life because they see being hosts as a business"

Mexico

"Difference in culture and food. If they are paired with families who are not open minded they tend to have trouble understanding each other."

Korea



Agent Survey

- ✓ Immersive Experience
- ✓ Family, host quality
- ✓ Safety
- ✓ Relationship with school
- ✓ Convenience

I can tell if a host family will be suitable by reading their profile or background.

Always/often: 62%

Sometimes: 30%

Rarely/never: 8%

In the past year, how many times have you asked for a rematch before the student arrived at the homestay for the first time?

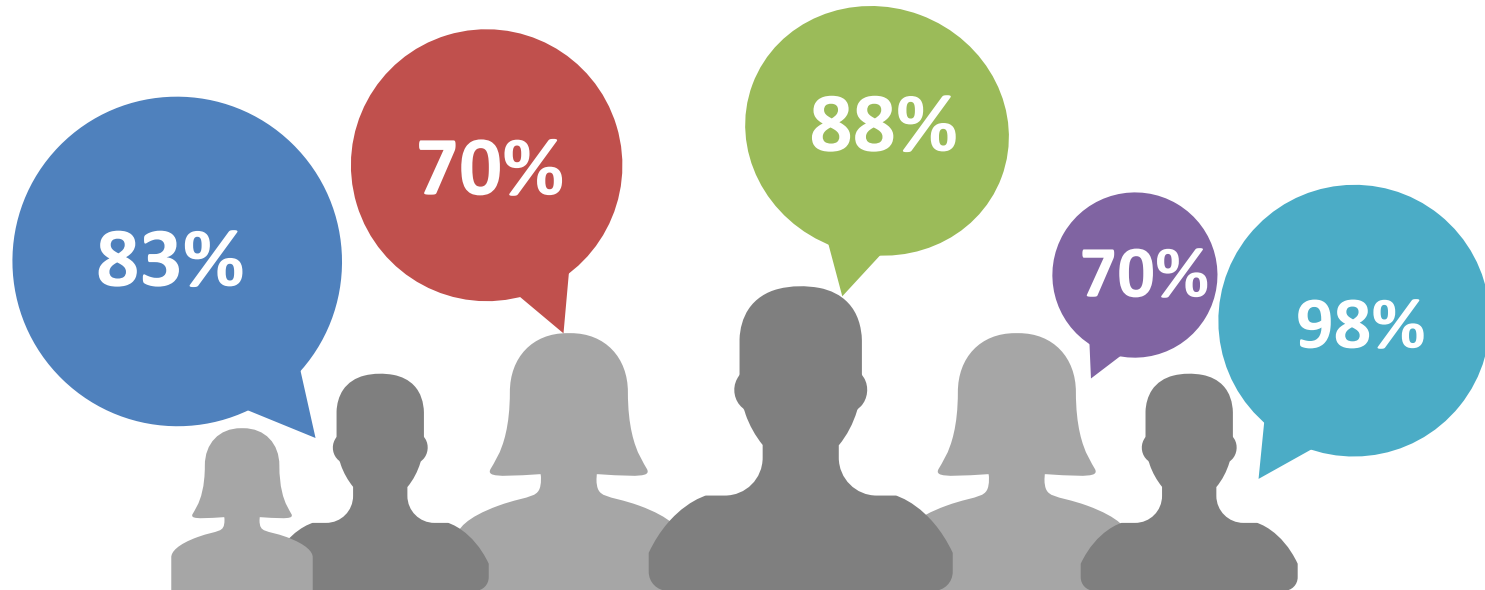
0 times: 35%

1-4 times: 55%

5+ times: 9%



Agent Survey



Safety

Always/often agree that homestay is generally safer than other accommodation options

Price

Always/often agree that homestay is generally less expensive than other accommodation options

Language

Always/often agree that homestay provides students with an opportunity to improve English skills

Diet

Always/often agree that they recommend homestay for students even if they have dietary restrictions

Recommend

Always/often agree that they are very likely (71%) or somewhat likely (27%) to recommend homestay to students



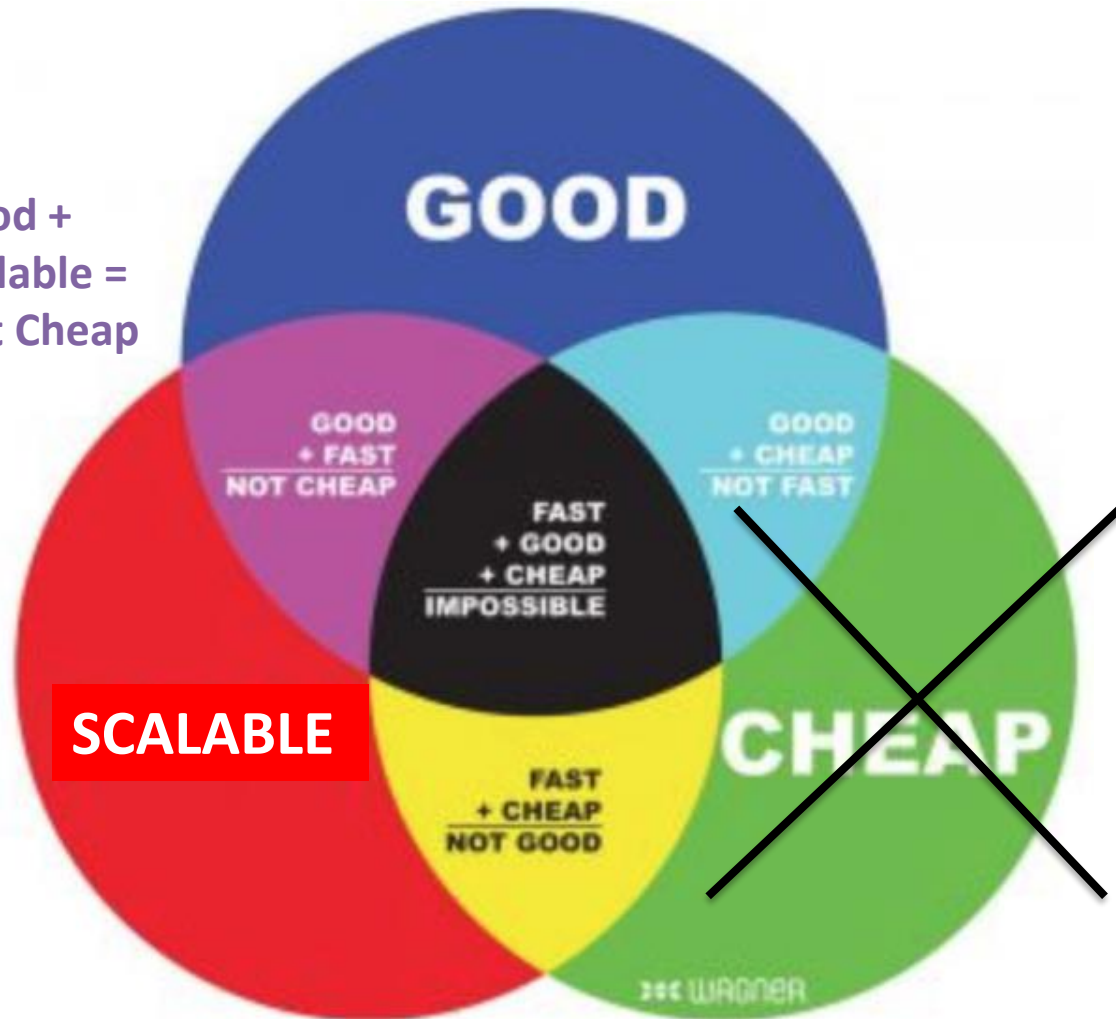
Homestay 2.0





Homestay 2.0

Good +
Scalable =
Not Cheap





Homestay 2.0





Homestay 2.0





Homestay 2.0





Homestay 2.0

Marriott partners with Hostmaker on home-sharing pilot

by Elliott Mest | Apr 23, 2018 10:12am



Marriott is kicking off its homesharing experiment in London. Photo credit: Getty Images/Stewart Marsden

The most important qualities of homestay shall be: The perception, way of their daily contact with the student, quality of the house” - Vietnam



Homestay 2.0





Homestay 2.0

- ✗ Cultural misunderstandings
- ✗ Lack of immersion
- ✗ Language/communication issues
- ✗ Food issues
- ✗ Messy
- ✗ Unsafe
- ✗ Unpredictable

- ✓ Certified Coordinators
- ✓ Qualified Hosts & Training
- ✓ Audited Homes
- ✓ Premium Offering

“Unsuitable hosts (rarely around, not helpful/welcoming to the students)... Hosts not able to provide a proper Canadian cultural experience, English language learning opportunities, or provide typical Canadian cuisine ... Limited quantities or choices of food ... Cost is so low that it doesn't attract suitable hosts” - Canada



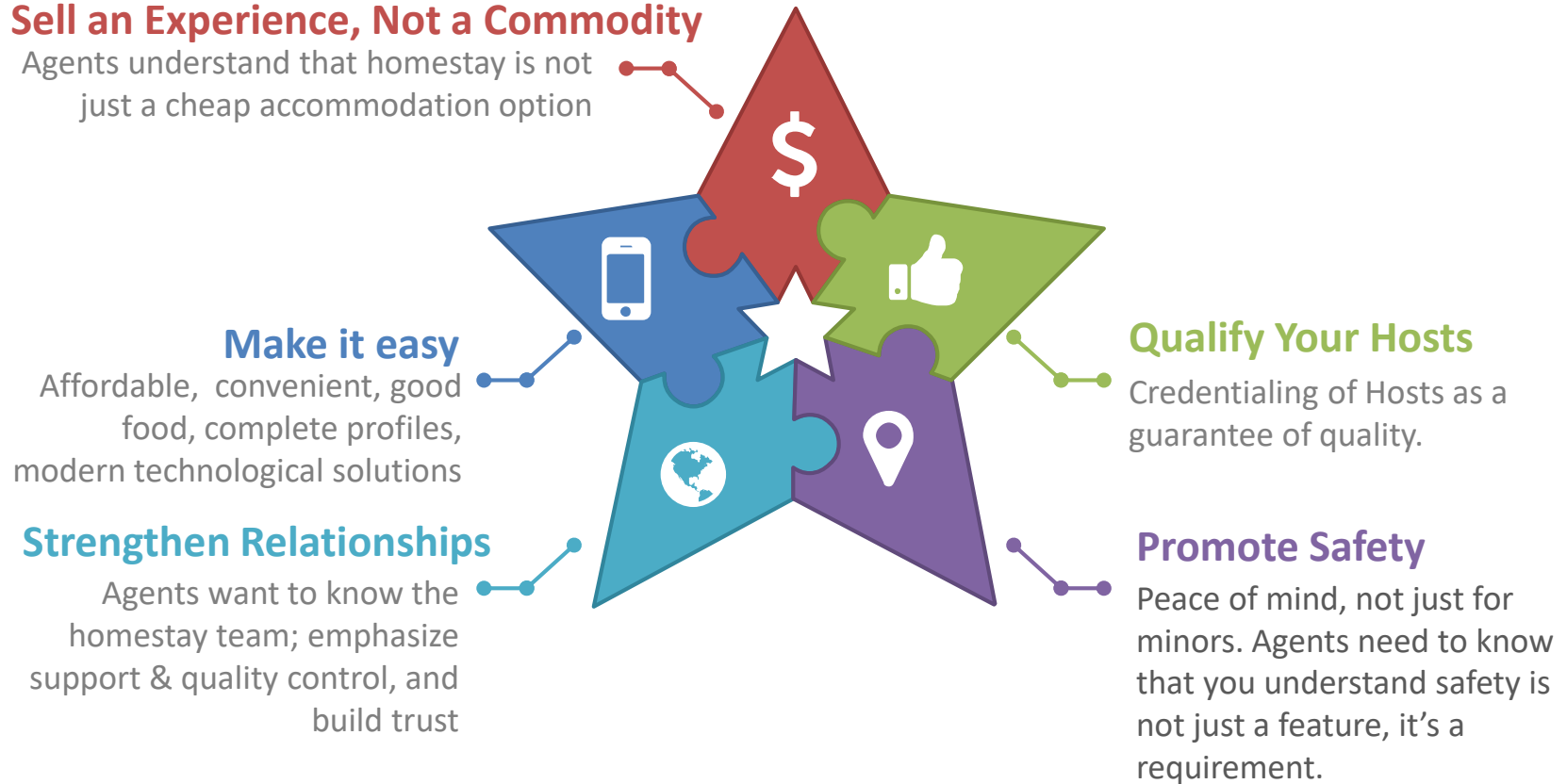
Homestay 2.0

Value Proposition

- ✓ Immersive Experience
- ✓ Family, host quality
- ✓ Safety
- ✓ Relationship with school
- ✓ Convenience

Sell an Experience, Not a Commodity

Agents understand that homestay is not just a cheap accommodation option





Homestay 2.0: Value Proposition Mindset

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Emphasis on location, safety, supervision	Usually hands off, self-serve, no liability	Experience, language, culture, safety, quality, convenience
Quality guarantee	No guarantee	Satisfaction guarantee = relocation
Smooth, fast, easy	Variable	Smooth, good service, easy
Professional service providers	Variable	Professional coordinators, qualified hosts (not pros)
Neutral?	Unavoidable liability	Opportunity
“Campus life”	“The independent choice”	“Home away from home”



Homestay 2.0

At your tables:

- What is the 'Accommodation Mindset' at your institution?
- Do you have a homestay family credentialing program?
- Have you considered positioning homestay – or some hosts – as a premium offering?
- What are the most common misconceptions about homestay that you encounter from agents? How do you overcome them?

“Sometimes families forget the importance of hosting an international student.” - Colombia



*“When the family is good, and are hosting students for the right reasons, *and* the student is on board and the match is a good one, a homestay experience can be a very enriching one for all involved. Students in homestay tend to use English for longer stretches of the day than boarding students, who tend to cling to others from the same nationality.”*



What can CHN do better or differently,
to make the hosting process easier for agents and students?

“This survey is the first step. After having done this, I am more likely to choose an outside provider over an in-house one.

*I think the homestay coordinator needs to have sufficient families and that a **school needs to limit placements in their programs based on this number of "good to excellent" families.** The "satisfactory" families are not good enough. I have been in international education since 1999 and I find that over the past few years Canada has had a boom in international students which has led to fierce competition among schools and homestay providers which has led to placing students in host families that they wouldn't have placed them in just five years ago. I used to get such complaints only from some host families in Ireland and the UK but now Canada and Australia are getting included as well. (The United States does a great job--to date we have never had a homestay complaint for teens or adults).*

Lastly, agent and homestay provider need to communicate freely (without fearing making any politically incorrect comments) to ensure a happy placement for both student and host family.”

Spain



Thank you!

We would be happy to hear from you!



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*“Students may forget their agent or school in Canada,
but they will never forget their second family.”*