

2016: WHAT DO CANADIAN INSTITUTIONS NEED TO BE PREPARED FOR?



SAMUEL VETRAK
STUDENTMARKETING, CEO

studentmarketing
YOUTH TRAVEL CONSULTANCY



LANGUAGES CANADA ANNUAL CONFERENCE
MARCH 4, 2016

INTRODUCTION

GLOBAL APPROACH



STUDENTMARKETING IS A UNITED NATIONS WORLD TOURISM ORGANIZATION AFFILIATE MEMBER.



AS AN ESOMAR MEMBER, I COMPLY WITH THE ICC/ESOMAR CODE AND ESOMAR WORLD RESEARCH GUIDELINES.

SAMUEL VETRAK, CEO, STUDENTMARKETING



ABOUT US

OUR CLIENTS

DESTINATIONS



ASSOCIATIONS

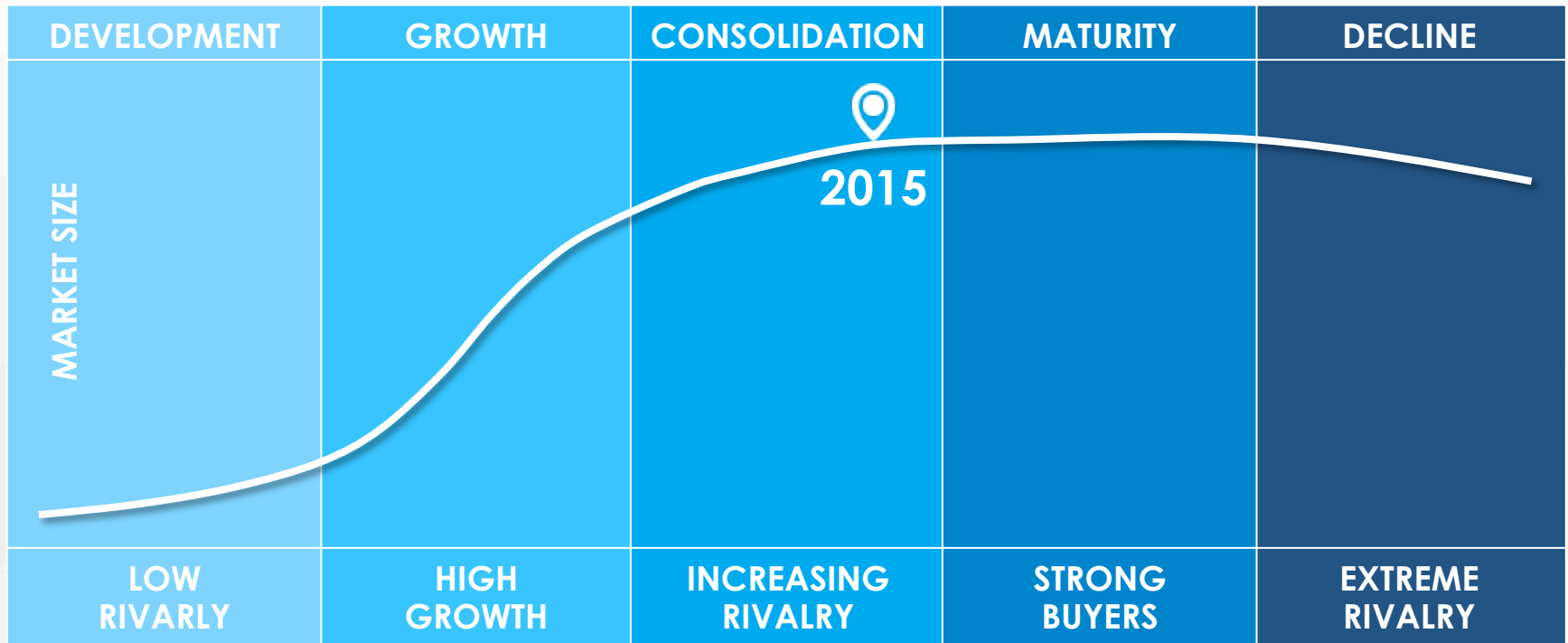


PROVIDERS



2015

YEAR IN REVIEW



Source: StudentMarketing, 2015



WWW.STUDENT-MARKET.COM



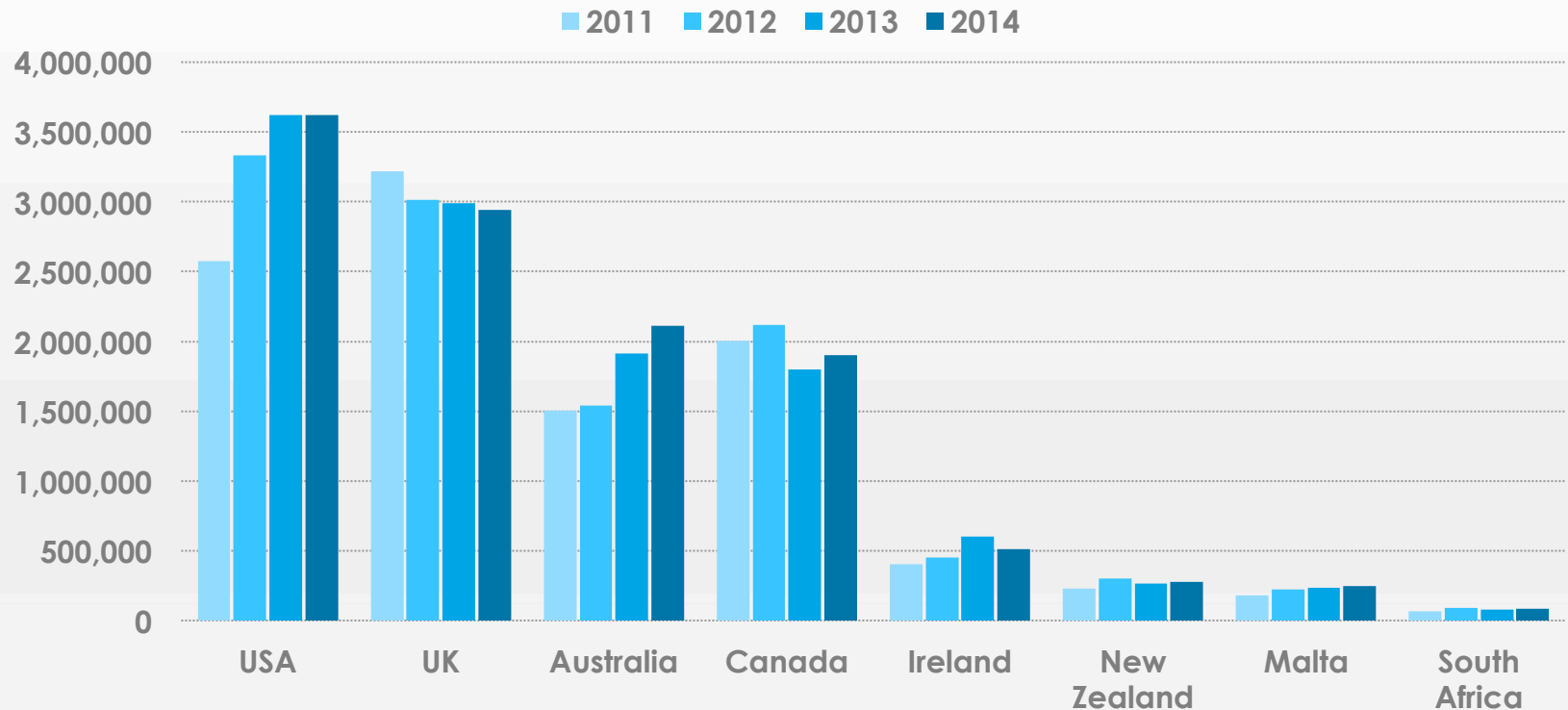
[STUDENTMARKTNG](https://twitter.com/STUDENTMARKTNG)



FACEBOOK.COM/STUDENTMARKTNG

GLOBAL MARKET

DESTINATION OVERVIEW (STUDENT WEEKS)



Source: StudentMarketing, 2015

CANADA

% CHANGE IN THE NUMBER OF STUDENT WEEKS SPENT IN CANADA

-1.2%

2012/2013

+1.5%

2013/2014

?%

2014/2015

?%

2015/2016

Source: StudentMarketing, 2015

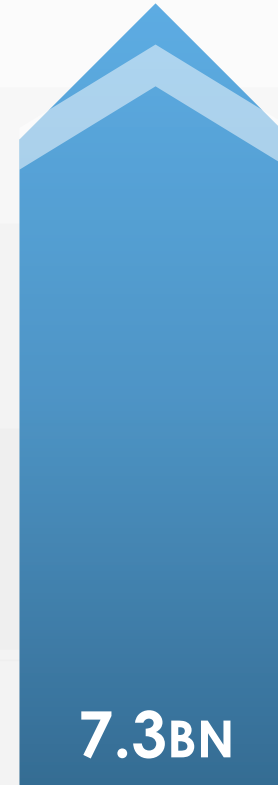
TRENDS/FACTORS/DRIVERS

- Global demand levels cooling down
- Less scholarships students
- Lack of presence in growing segments (juniors)
- Lack of government support (legislature, visa, stats, marketing)
- Intensive overseas marketing activities
- Recent immigration changes
- Exchange rates developments

31% LE students progress to HE. LE means 46% of all new arrivals to HE.

DEMAND FOR ENGLISH

NO. OF
ENGLISH
SPEAKERS & LEARNERS

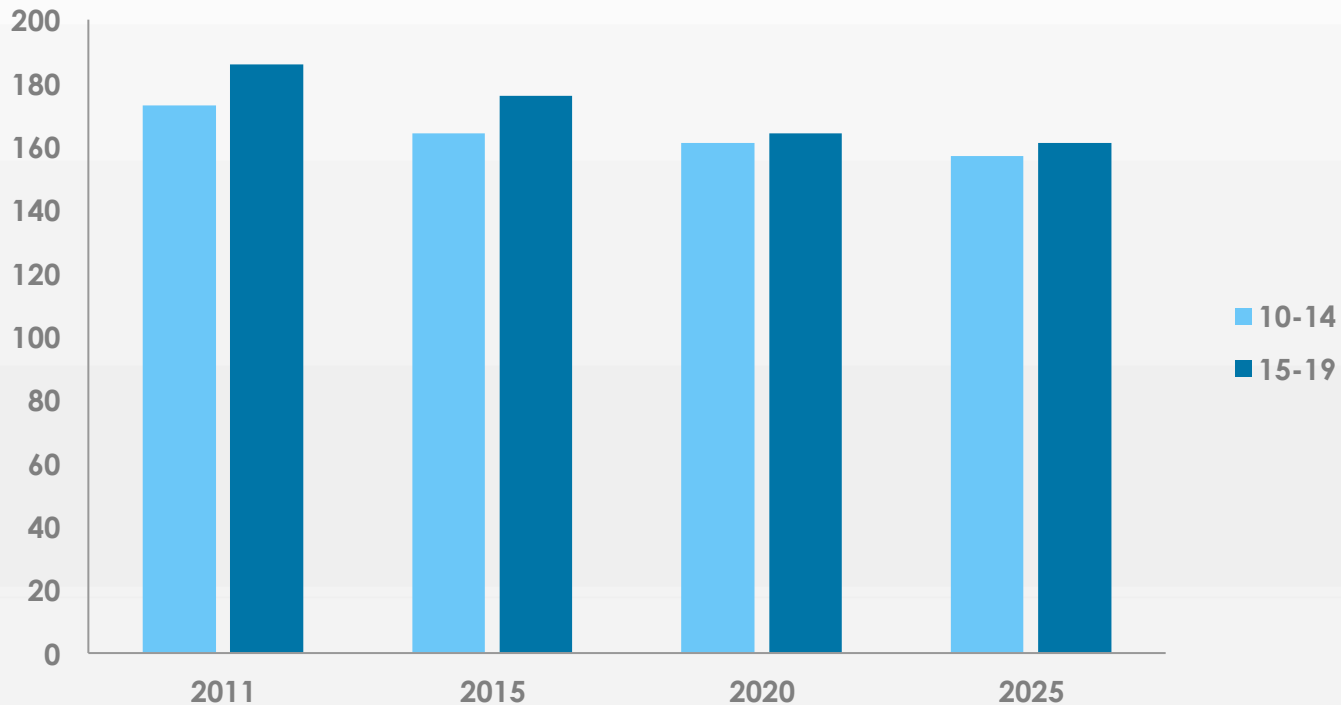


WORLD
POPULATION

Source: British Council, 2015; U.S. Census Bureau, International Data Base, 2016

DEMOGRAPHIC CHANGE

NUMBER OF PEOPLE IN THE TOP 20 ELT MARKETS BY AGE GROUP (MILLIONS)



Source: UNESCO Population Division, 2010

- Longer stays
- Multiple purchase
- Accommodation
 - Insurance
 - Meet & Greet
- Extra courses/activities
- Part of package (school trips, training)

VOLUME

VALUE



PRODUCT

SHARE OF JUNIOR STUDENTS AT LANGUAGES CANADA MEMBER PROGRAMS

studentmarketing
YOUTH TRAVEL CONSULTANCY

11

8.5%

2012

10%

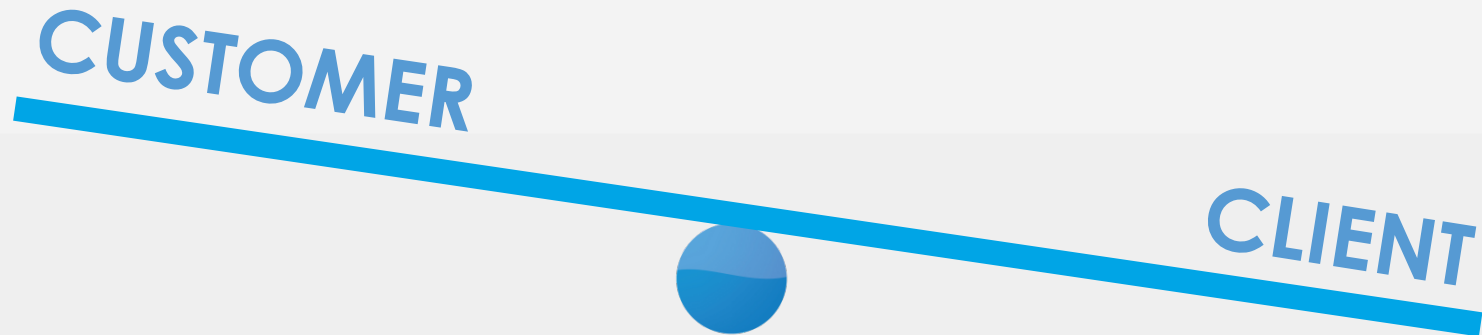
2013

8%

2014

Source: Languages Canada, 2013-2015

SOURCES OF FUNDING



Source: StudentMarketing, 2015

40%

OF LC PRIVATE MEMBER
CENTERS ARE PART OF A CHAIN



Source: StudentMarketing, 2015



WWW.STUDENT-MARKET.COM



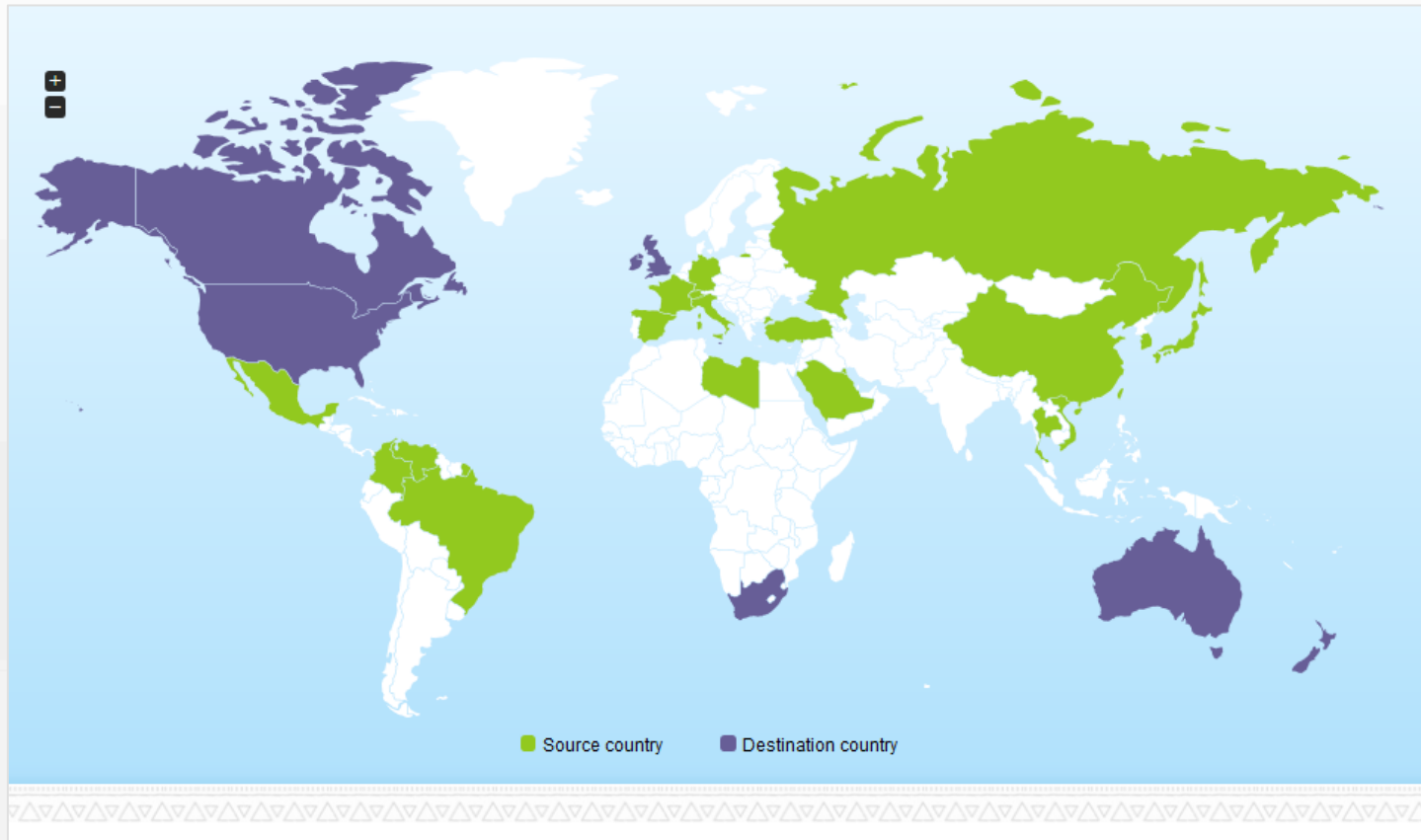
[STUDENTMARKTNG](https://www.twitter.com/STUDENTMARKTNG)



[FACEBOOK.COM/STUDENTMARKTNG](https://www.facebook.com/STUDENTMARKTNG)

SOURCE MARKETS

INTERACTIVE MAP



Source: StudentMarketing, 2015



WWW.STUDENT-MARKET.COM



[STUDENTMARKTNG](https://www.tumblr.com/studentmarktng)



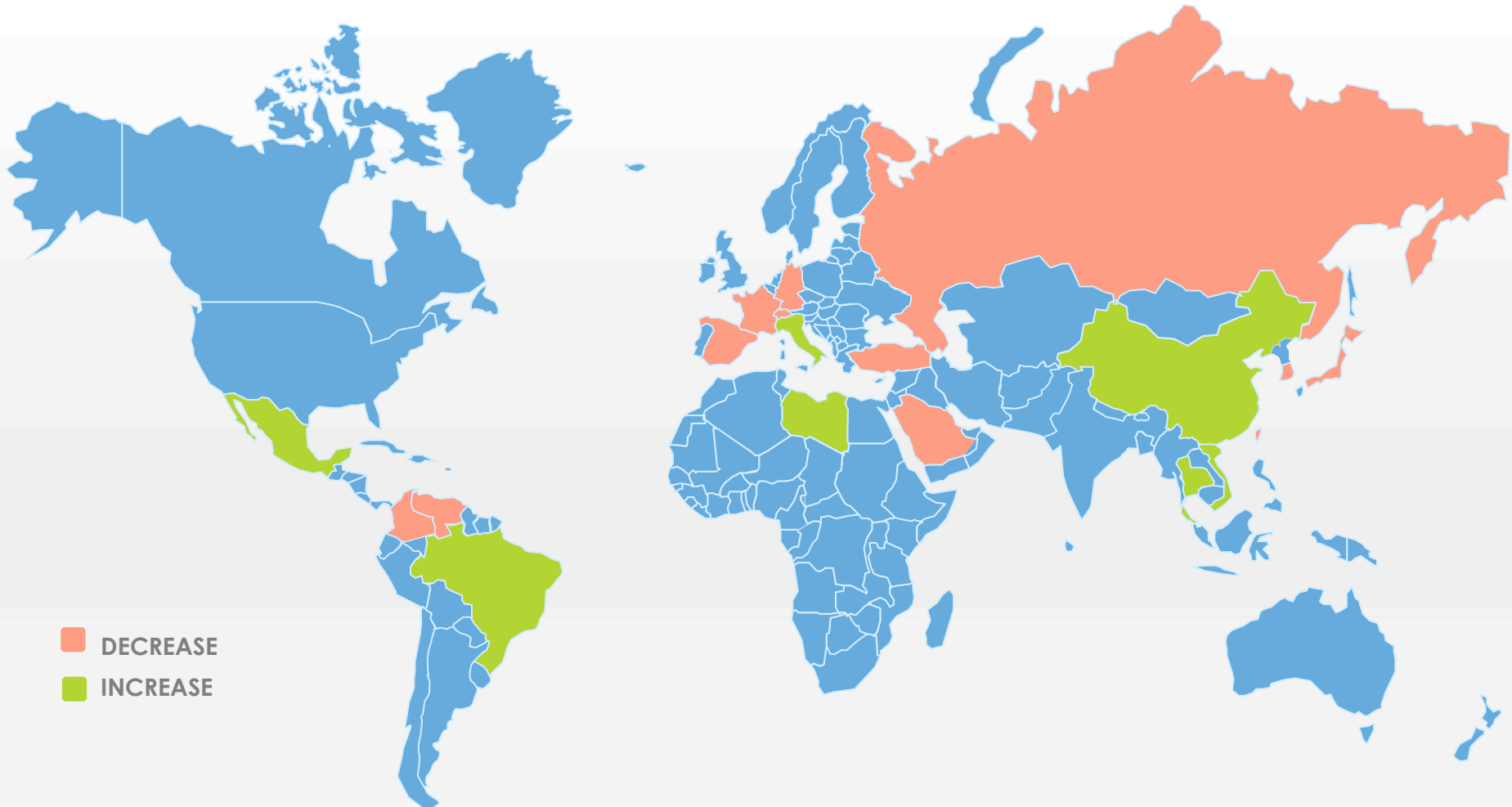
FACEBOOK.COM/STUDENTMARKTNG

SOURCE MARKETS

2013 VS 2014 GLOBAL DEVELOPMENT IN THE TOP 20 SOURCE MARKETS

studentmarketing
YOUTH TRAVEL CONSULTANCY

15



DECREASE

INCREASE

Source: StudentMarketing, 2015



WWW.STUDENT-MARKET.COM



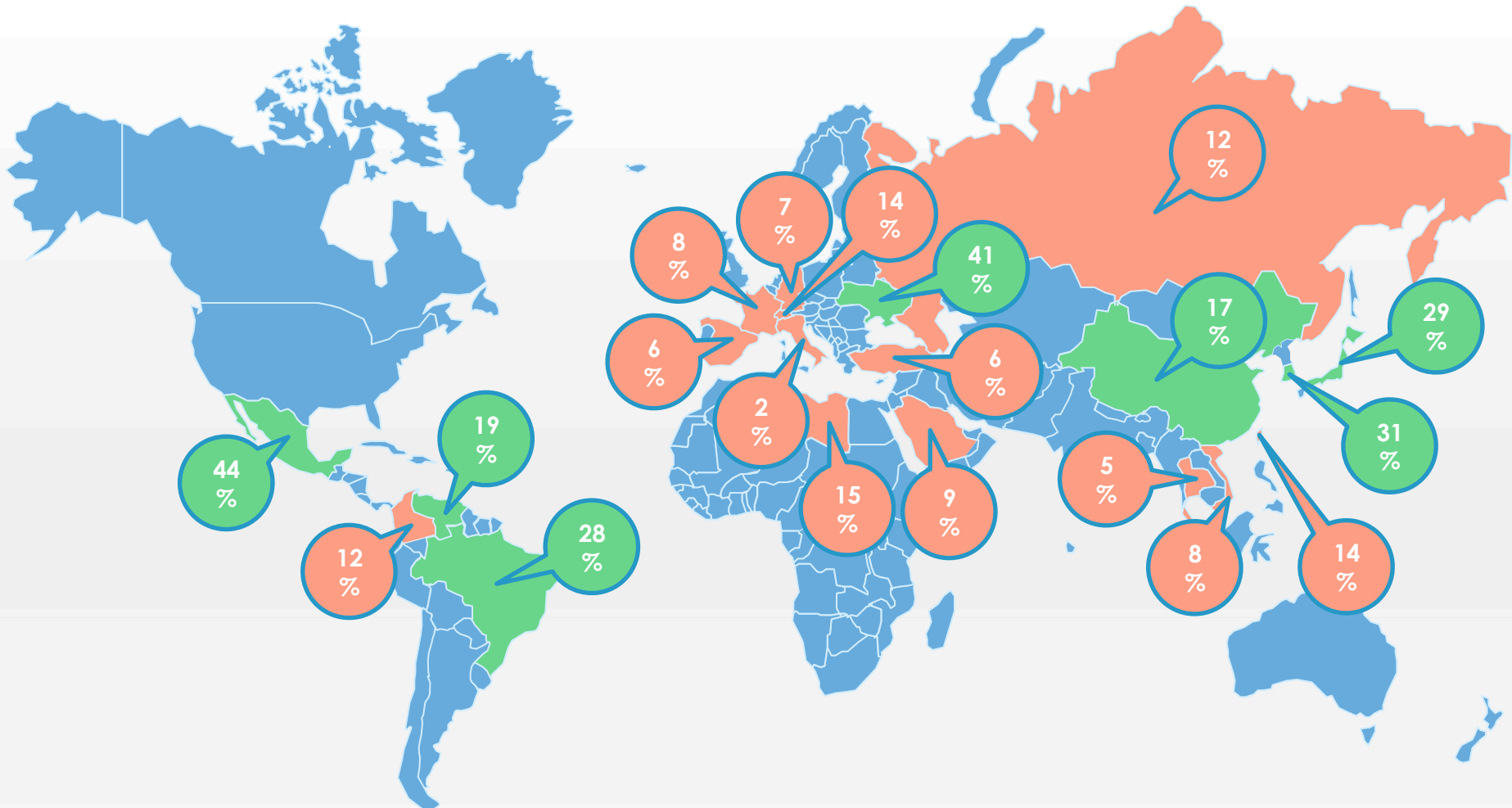
[STUDENTMARKTNG](https://www.tumblr.com/studentmarktng)



FACEBOOK.COM/STUDENTMARKTNG

SOURCE MARKETS

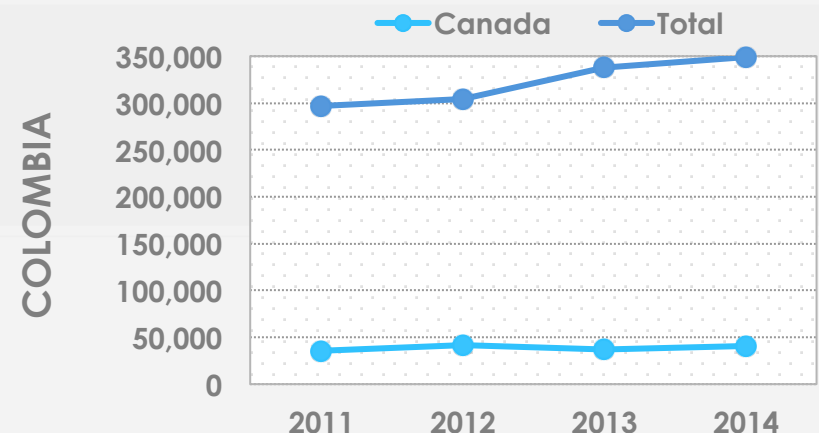
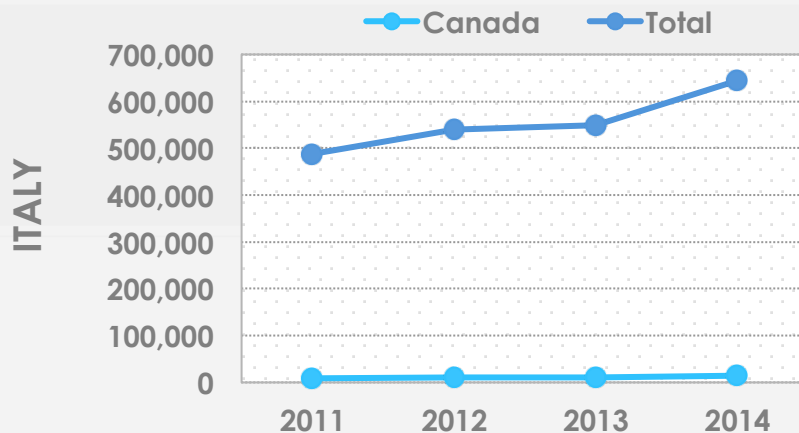
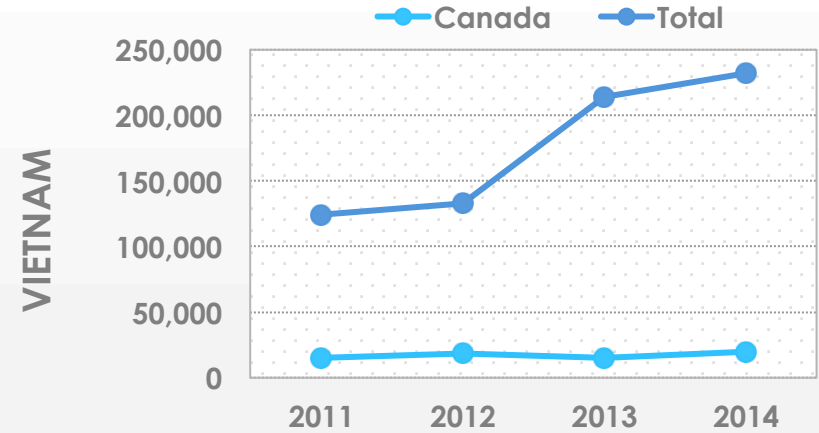
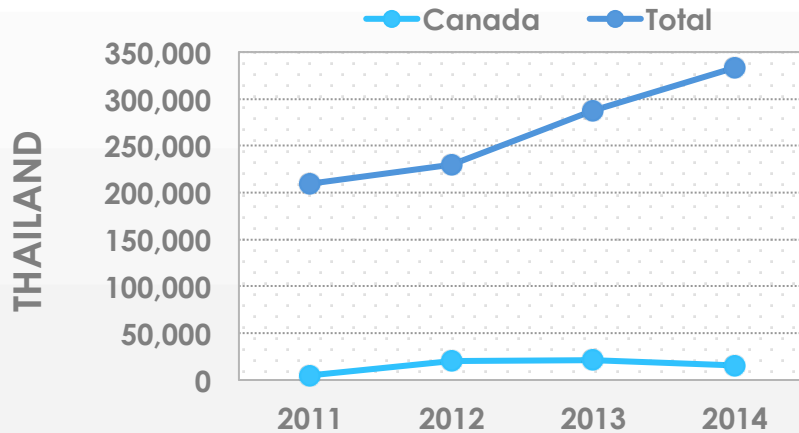
TOP 20 MARKETS FOR THE CANADA AND CANADA'S MARKET SHARE



Source: StudentMarketing, 2015

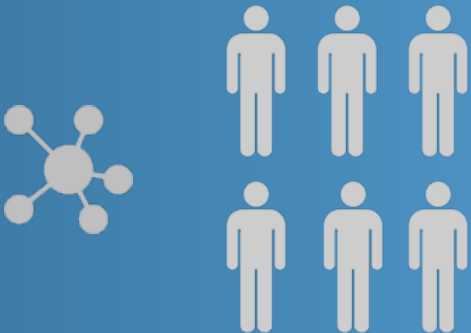
SOURCE MARKETS

MARKET PERFORMANCE OF SELECTED MARKETS IN CANADA AND GLOBALLY



Source: Languages Canada, 2015; StudentMarketing, 2015

SALES INFRASTRUCTURE



OF SALES PEOPLE ARE
LOCATED IN SOURCE
COUNTRIES

Source: StudentMarketing, 2015

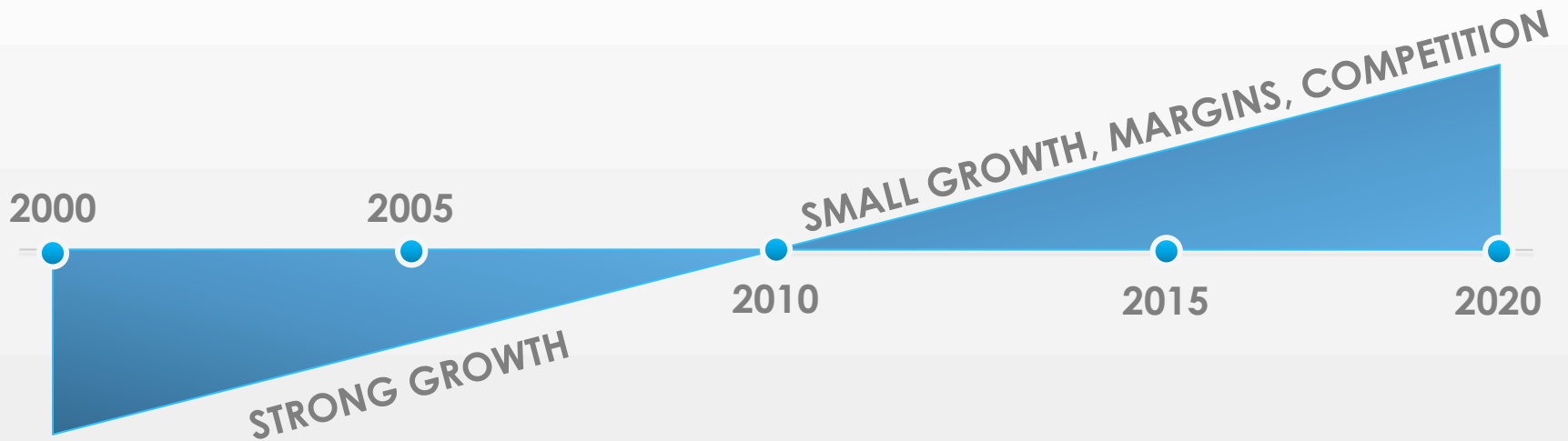
DISTRIBUTION



Source: StudentMarketing, 2015

AGE OF TECHNOLOGY





INTUITIVE
DECISION MAKING



INFORMED DECISION
MAKING

Source: StudentMarketing, 2015

PRICE

HEDGING

GROSS PRICE

DYNAMIC PRICING

SEASONAL PRICING

NET PRICE

BONUSES

SPECIAL OFFERS


DISCOUNTS

REGIONAL PRICING

Source: StudentMarketing, 2015



COMMISSION



3-5%

INCREASE IN
COMMISSION (EST.)

Source: StudentMarketing, 2015



WWW.STUDENT-MARKET.COM



[STUDENTMARKTNG](https://www.twitter.com/STUDENTMARKTNG)



[FACEBOOK.COM/STUDENTMARKTNG](https://www.facebook.com/STUDENTMARKTNG)

2015 – 2020

- **New stage** of industry development (structural changes)
- Product shift towards the **junior** segment
- **Interactive** with other sectors
- More **sophistication and precision**

Source: StudentMarketing, 2015



THANK YOU!

studentmarketing
YOUTH TRAVEL CONSULTANCY



HERRENGASSE 1-3, 1010 VIENNA, AUSTRIA



+43-650-612-4527



BUSINESS@STUDENT-MARKET.COM



WWW.STUDENT-MARKET.COM



STUDENTMARKTNG



STUDENTMARKETING
IS A UNITED NATIONS
WORLD TOURISM
ORGANIZATION
AFFILIATED MEMBER.



AS AN ESOMAR MEMBER, I COMPLY WITH THE
ICC/ESOMAR CODE AND ESOMAR WORLD
RESEARCH GUIDELINES.

SAMUEL VETRAK, CEO, STUDENTMARKETING