

The i-graduate ICEF Agent Barometer

2019



Online survey developed in partnership by i-graduate & ICEF



Established in 2007, the ICEF Agent Barometer has tracked the opinions of agents across the world for 12 years



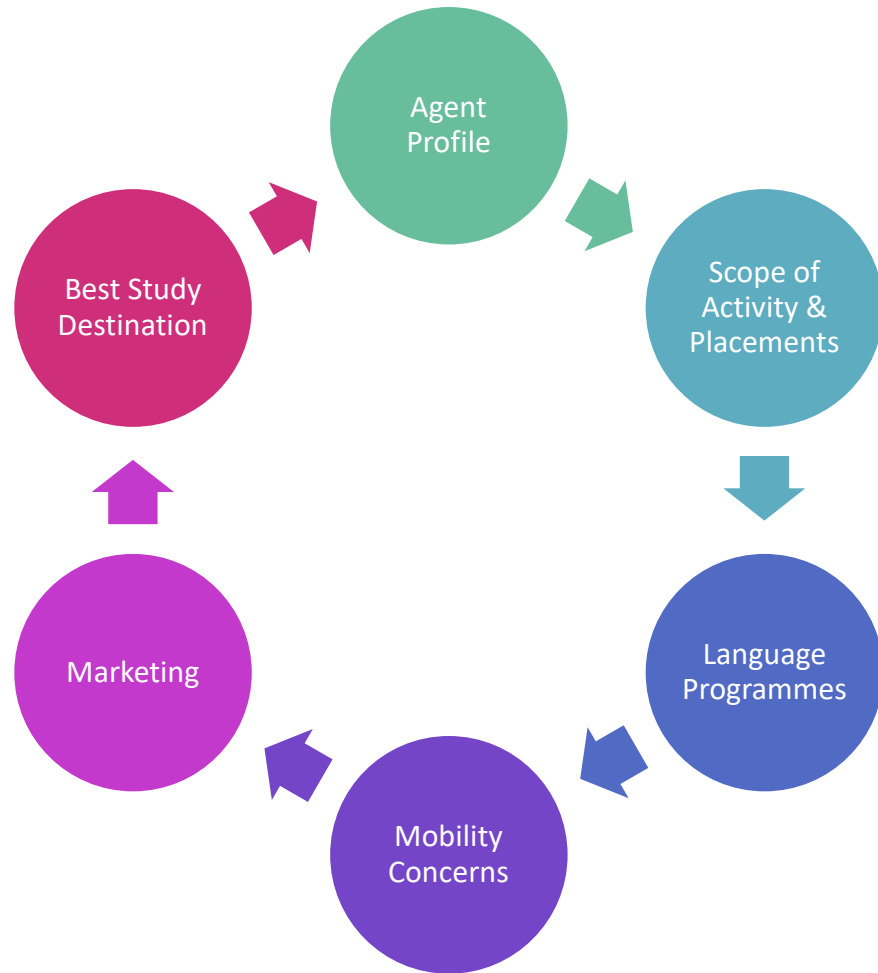
The 2019 study ran during August - September



Overall 2065 agents responded from 119 countries



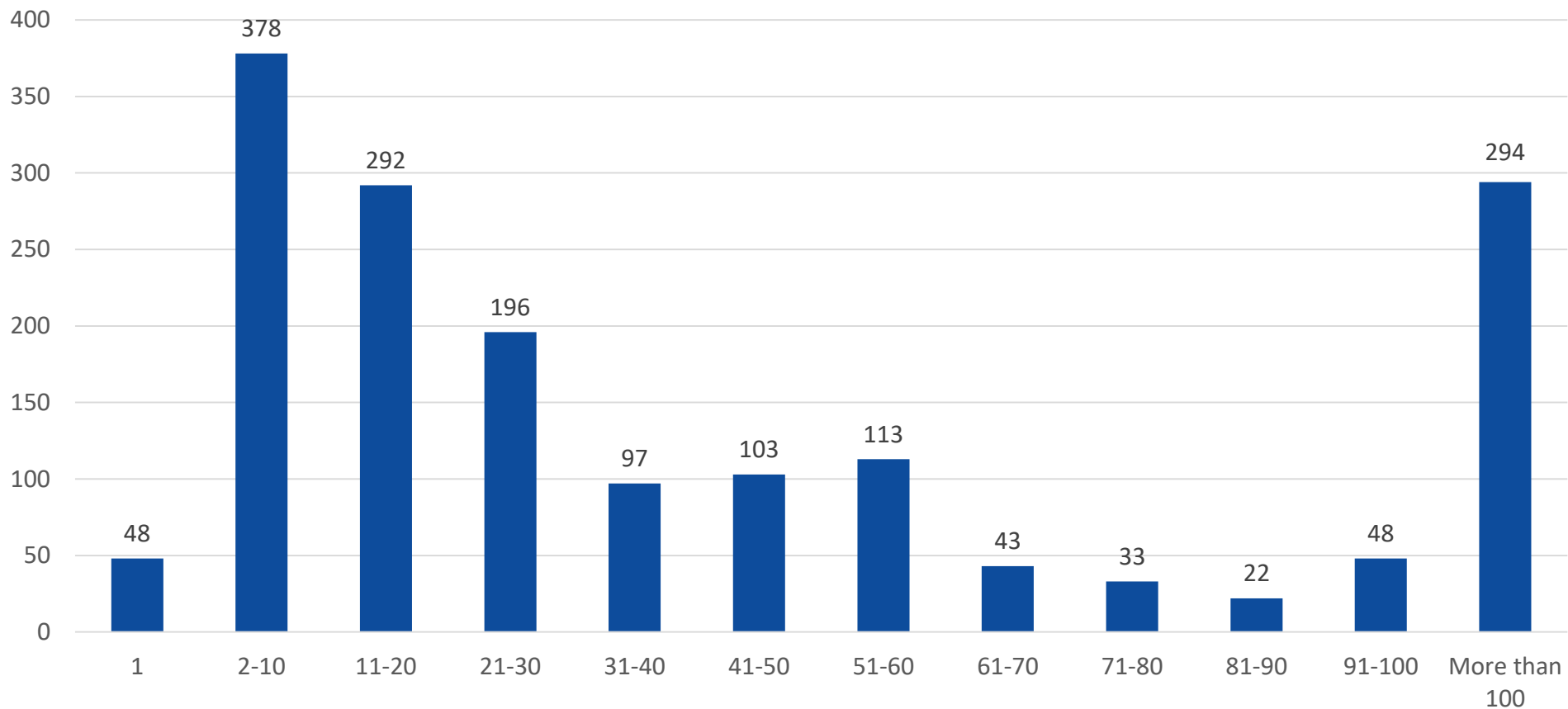
- Agent Profile
- Scope of Activity & Placements
- Language Programmes
- French Education Focus
- Secondary Education
- Higher Education
- Distance Learning / On-line Learning
- Work & Travel/Study and Cultural Exchange Programmes
- How Many Students do Agents Expect to Place in the Next 12 Months?
- Mobility Concerns
- Country Rankings by Study Type
- Best Study Destination
- Alumni Engagement
- Marketing
- Training and Accreditation
- Other Products and Services



Agent Profile 2019: Profile of Respondents

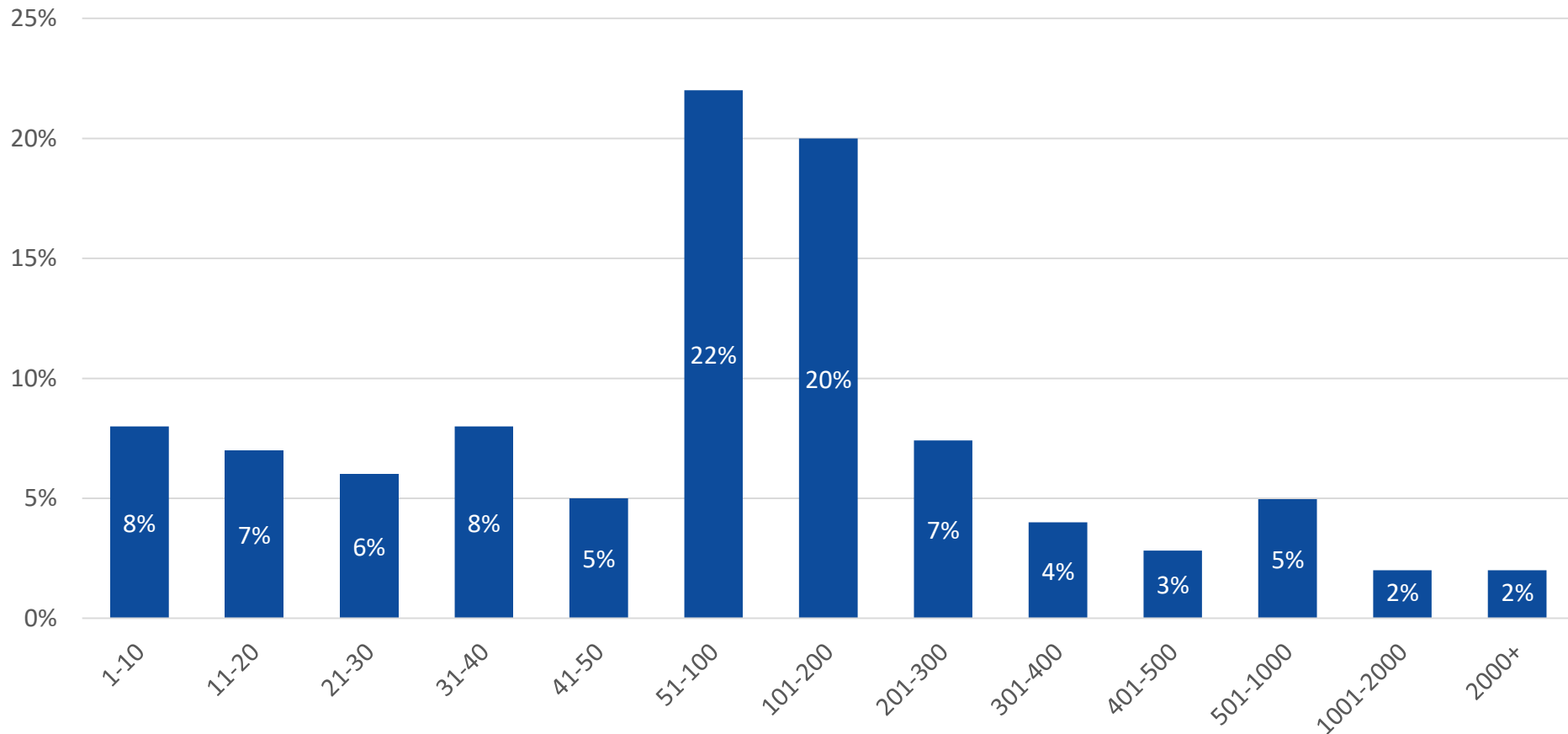
2,065 agents responded from more than 119 countries

	No. Respondents	%		No. Respondents	%
India	315	15.3%	Colombia	47	2.3%
Nepal	223	10.8%	Mexico	47	2.3%
Canada	112	5.4%	Bangladesh	43	2.1%
Nigeria	99	4.8%	Ukraine	38	1.8%
Brazil	89	4.3%	Spain	37	1.8%
Pakistan	88	4.3%	Kazakhstan	33	1.6%
Vietnam	87	4.2%	Italy	27	1.3%
Australia	71	3.4%	United Kingdom	25	1.2%
China	54	2.6%	Saudi Arabia	22	1.1%
Turkey	49	2.4%	Other	510	24.7%
Russian Federation	49	2.4%			



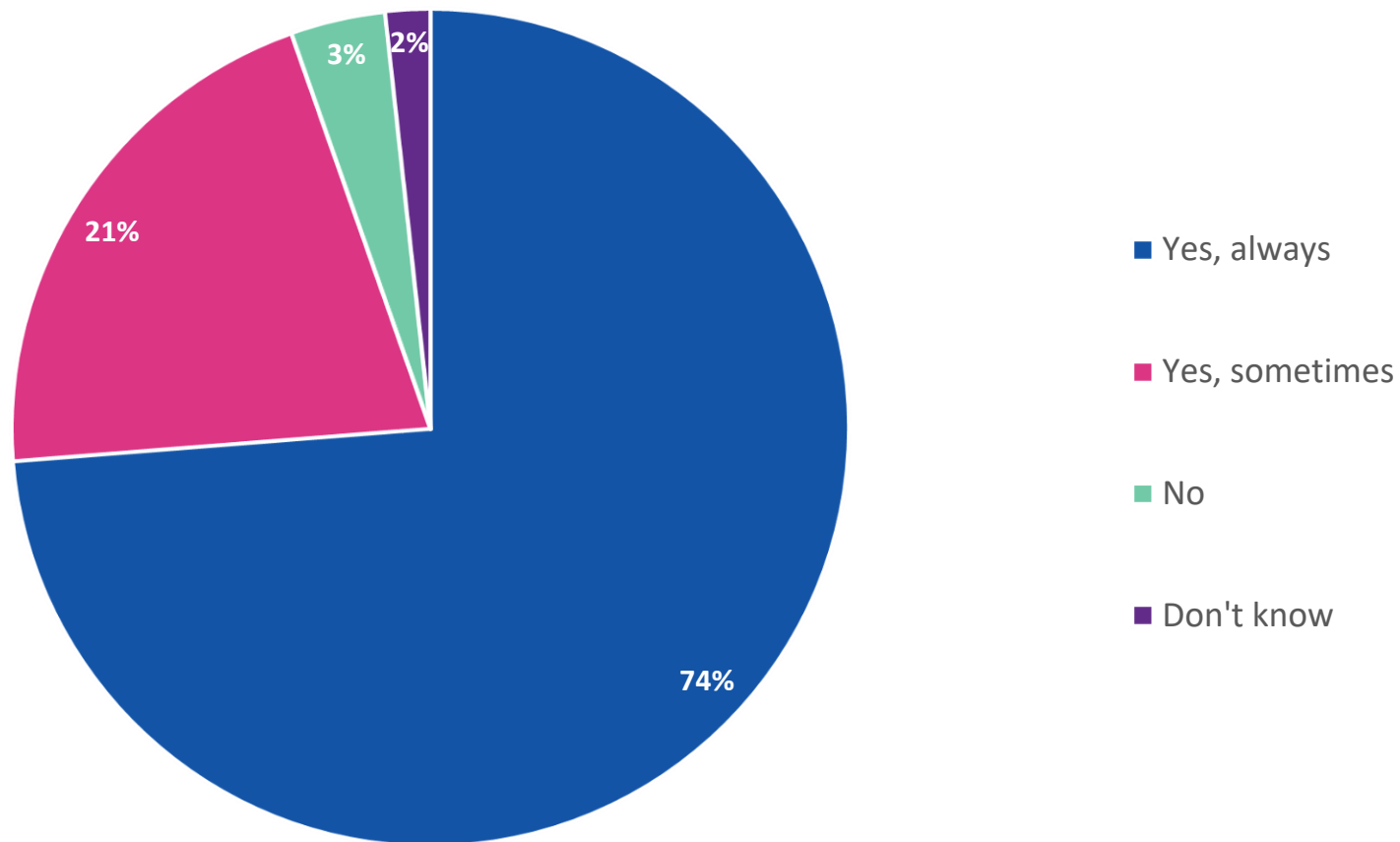
Base no: 1,667

Approximately how many institutions does your company represent?



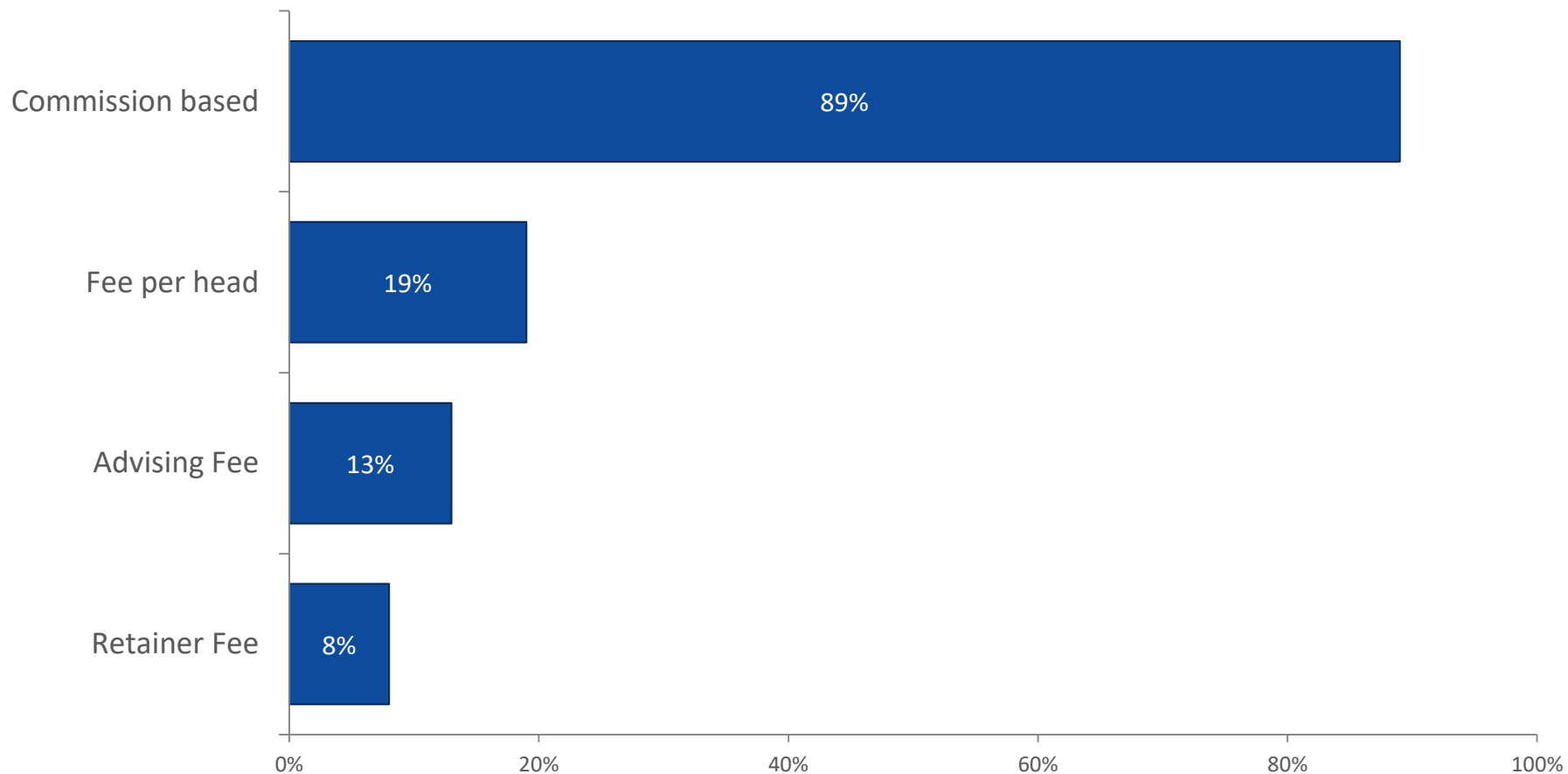
Base no: 1,687

How many students have you sent in the last 12 months?



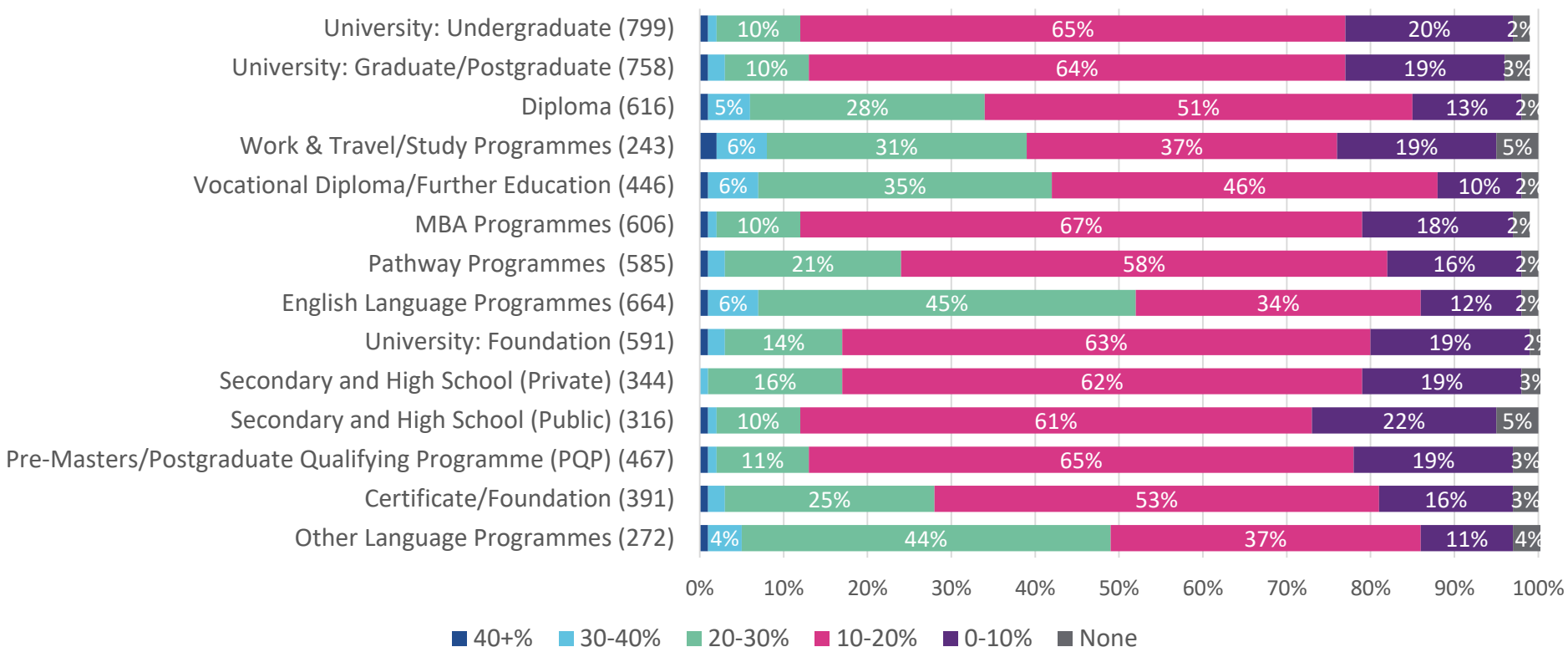
Base no: 1113

Do you have contracts in place with the institutions you work with?



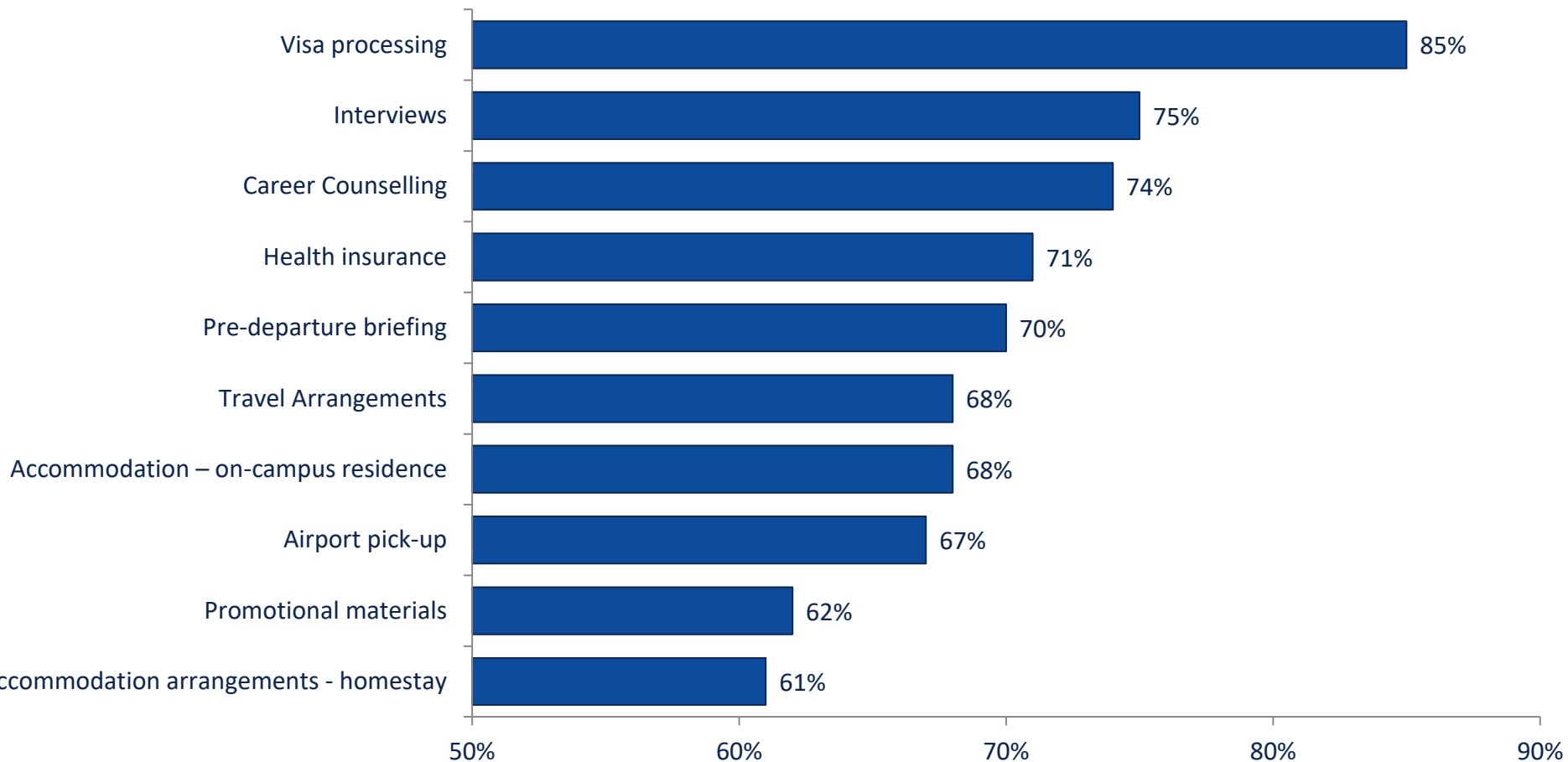
Base no: 1206

Which compensation method is the most commonly used form for your agency?



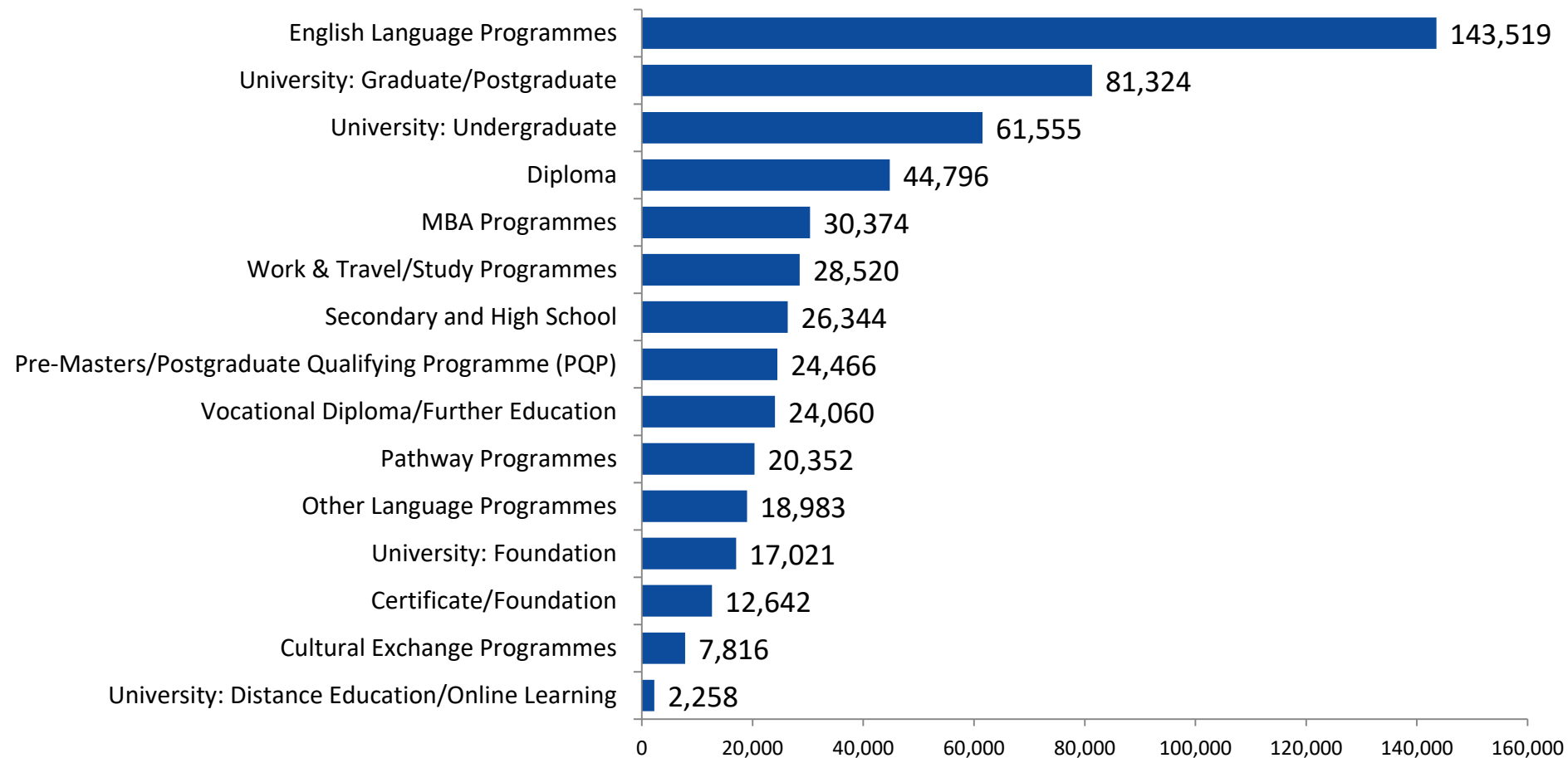
What is your average commission charge for:

Scope of Activity



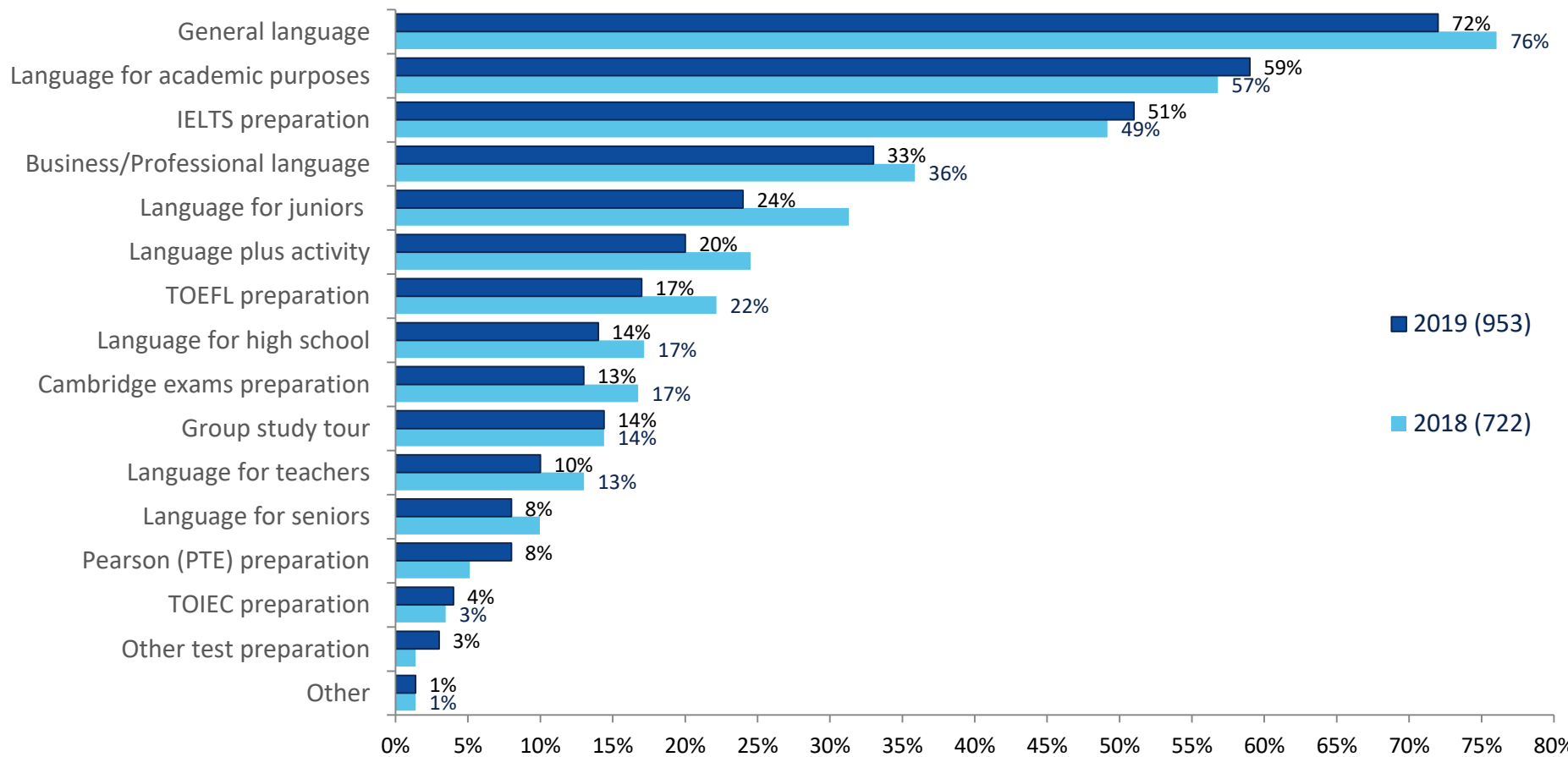
Base no: 1,211

What services does your company provide to students as clients?



Base no: 2065

How many students have you sent in the last 12 months?



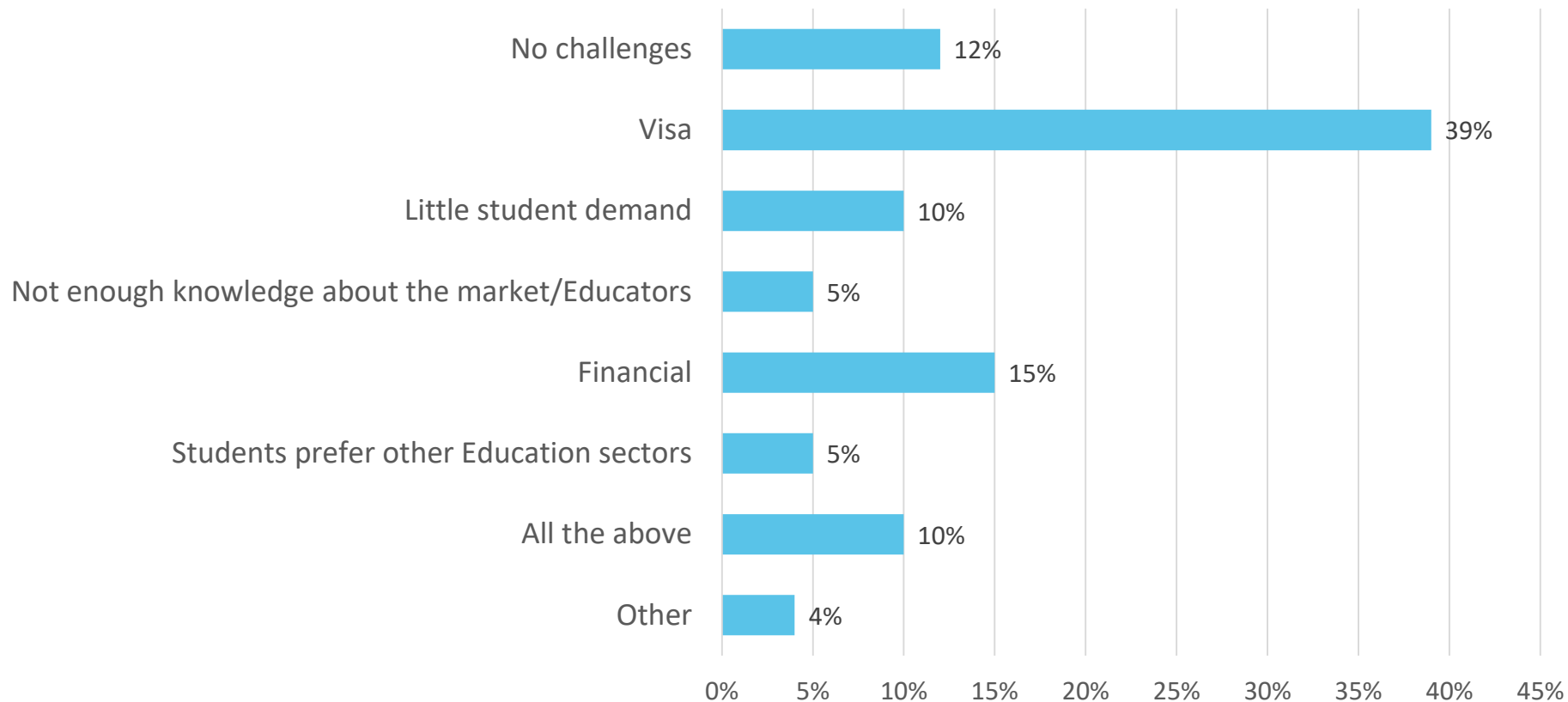
Base no: 953

What types of language programmes do you place students in?

Number of students placed in the last 12 months: trend data

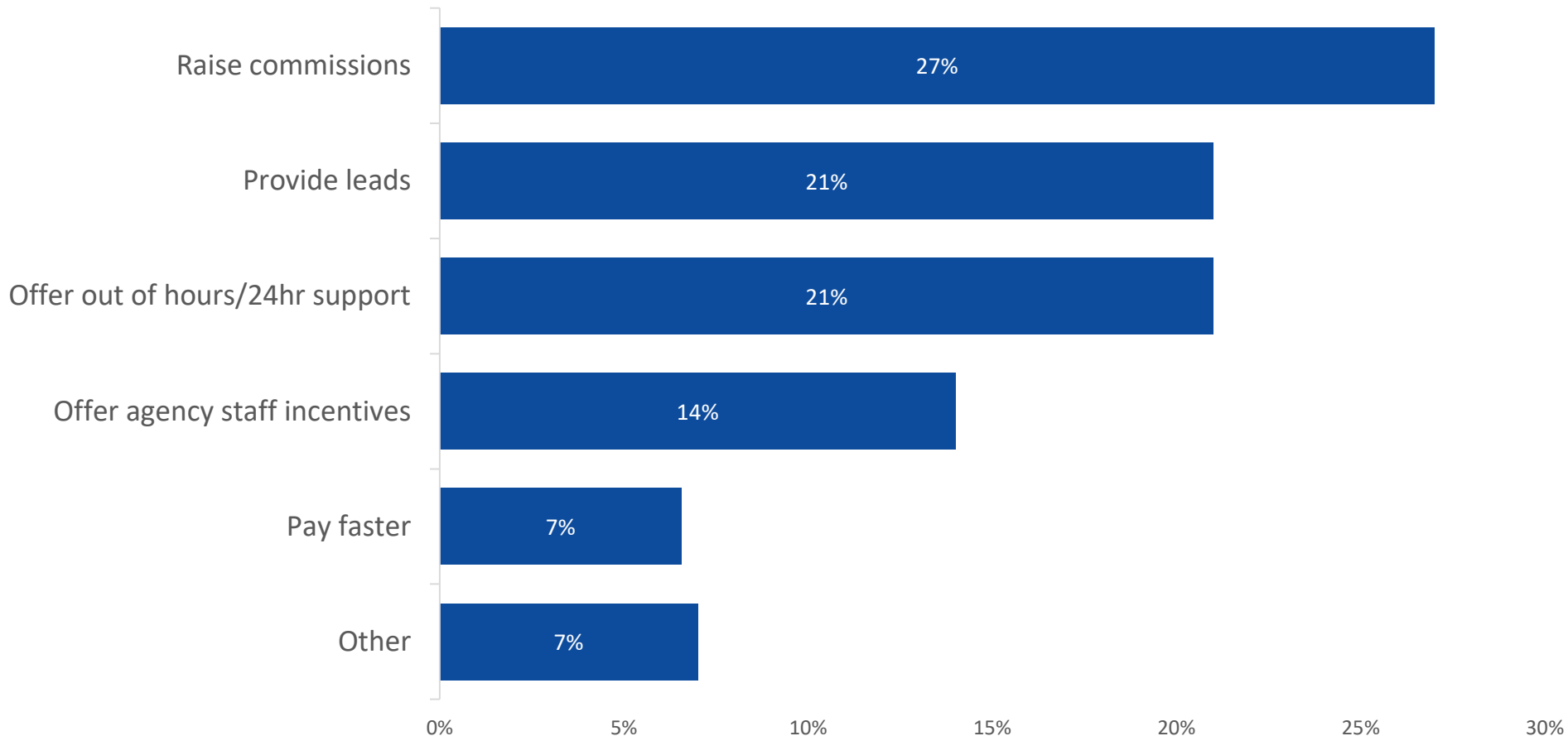
	2019 (2065)	2018 (1026)	2017 (1116)	2016 (897)	2015 (1358)	2014 (912)	2013 (995)
Total	548,607	352,976	224,219	207,727	297,488	360,065	328,877
Secondary Schools	26,344	23,587	10,969	11,436	16,202	39,419	26,523
Vocational Education	24,060	9,980	9,353	9,728	9,546	16,259	15,978
Foundation	17,021	8,852	8,579	6,540	8,811	16,080	11,189
Undergraduate	61,555	25,637	31,241	23,812	32,692	42,923	31,575
Graduate/Postgraduate	81,324	26,816	35,894	26,720	40,386	46,461	35,879
MBA Programmes	30,374	9,188	14,063	9,580	11,678	13,209	21,835
Work & Travel / Study	28,520	21,811	26,445	n/a	n/a	n/a	n/a
English Language Programmes	143,519	200,676	86,988	109,639	148,690	145,115	161,402
Distance education/Online learning	2,258	1,121	687	895	1,505	1,165	12,780
Other Language Programmes	18,983	25,308	n/a	n/a	n/a	n/a	n/a

Language Programmes



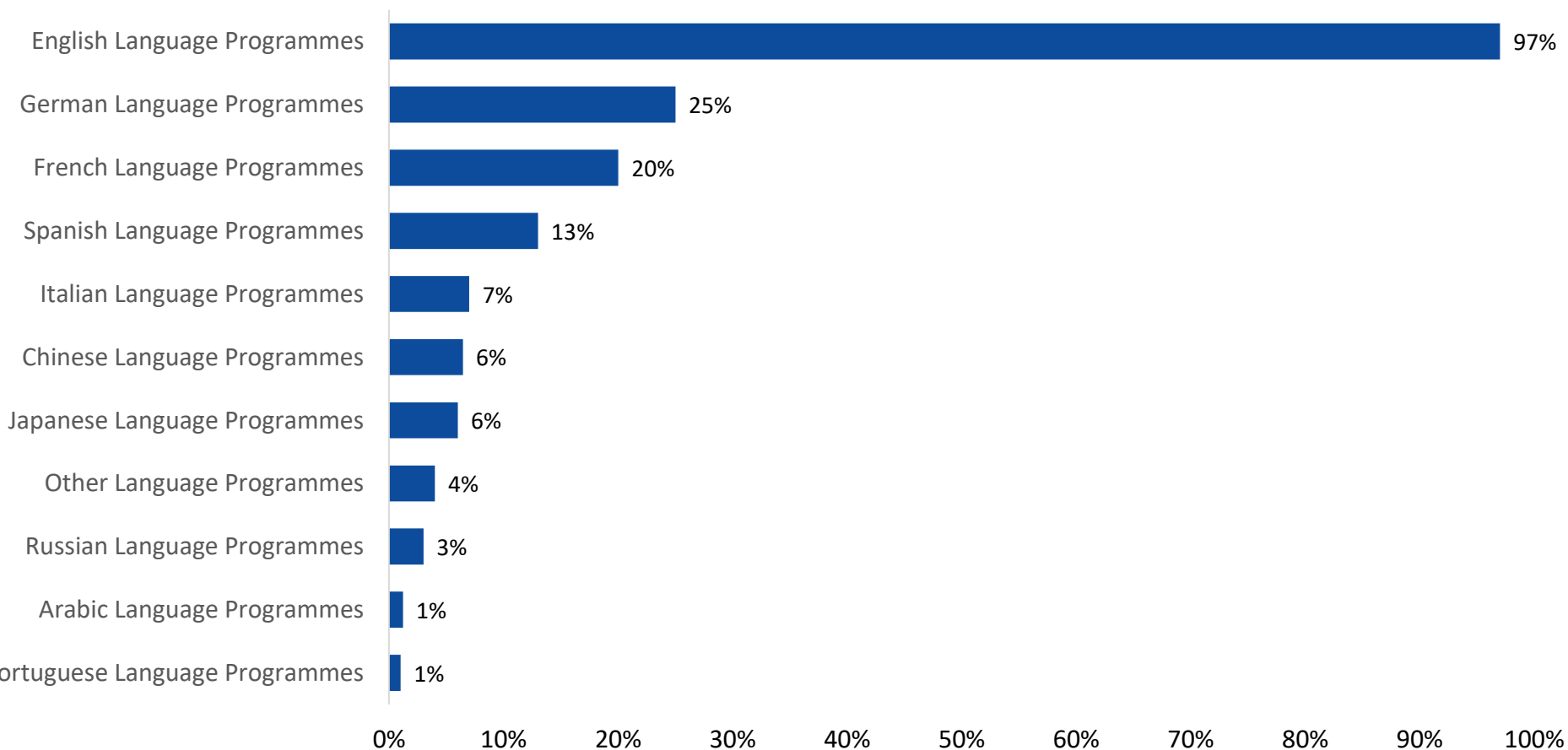
Base no: 961

What challenges do you have recruiting for language programmes?



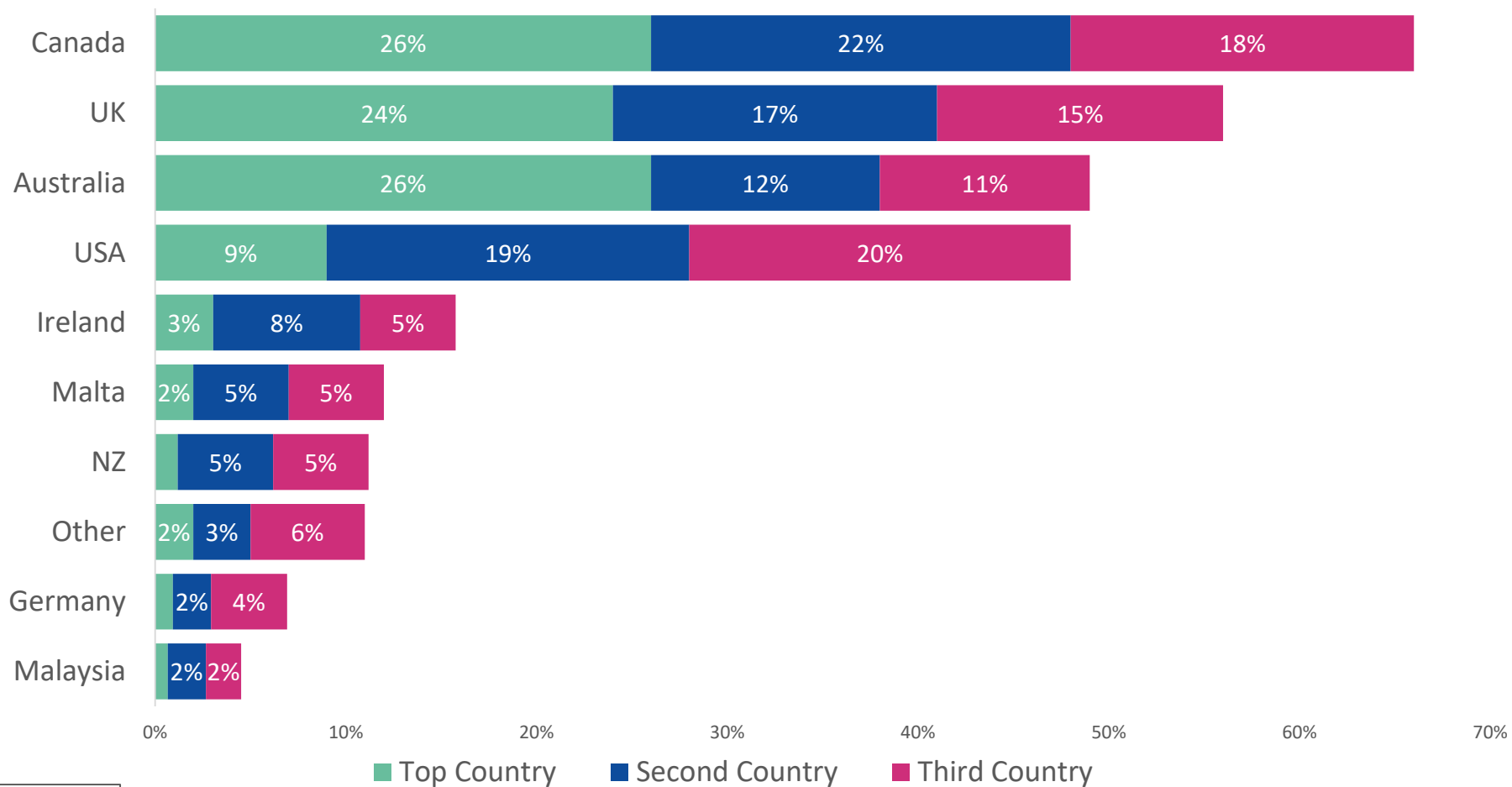
Base no: 961

What ONE improvement on the language institutional side would MOST help you recruit more students?



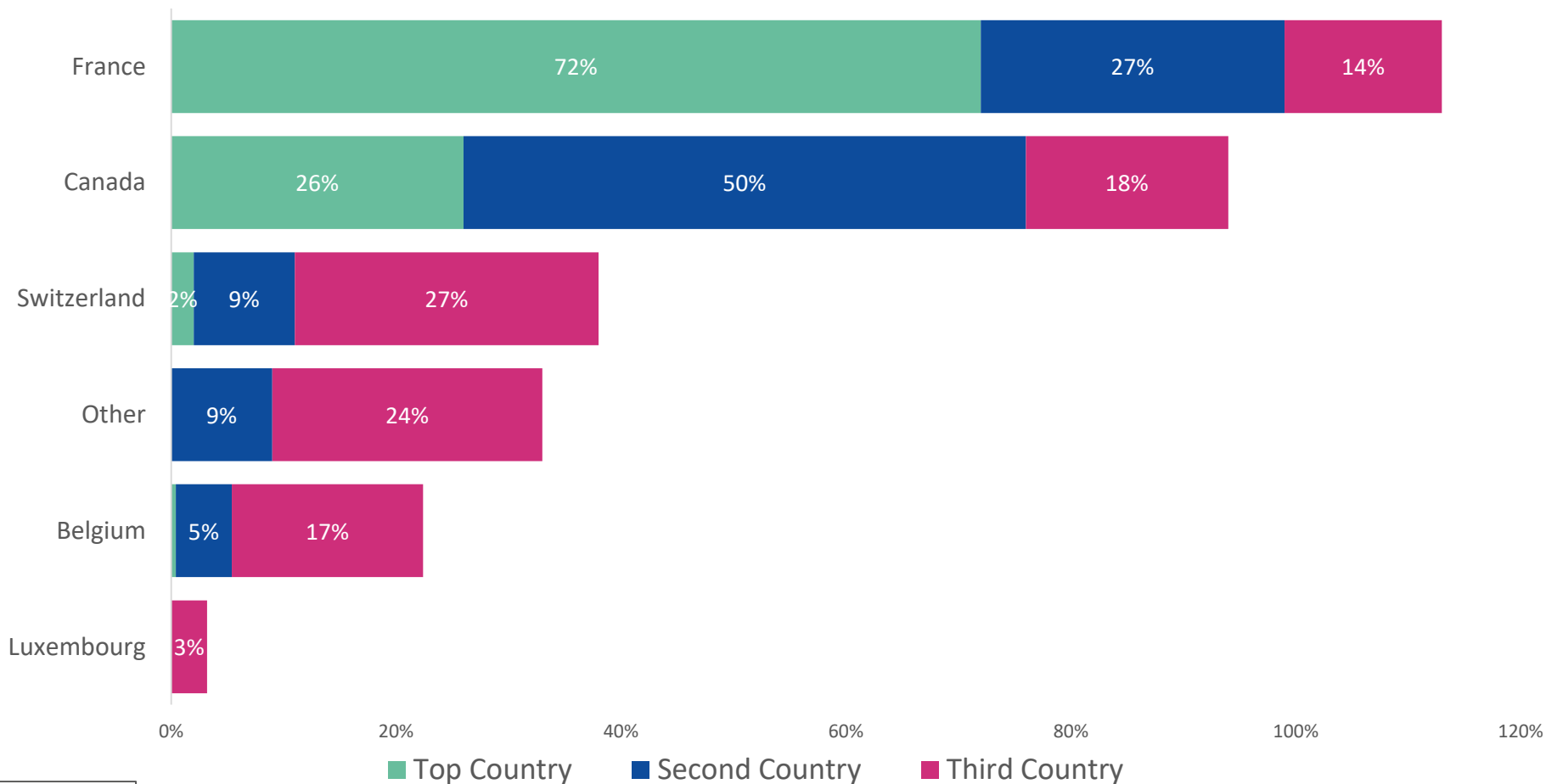
Base no: 1125

What language programmes do you send students to?.



Base no: 1063

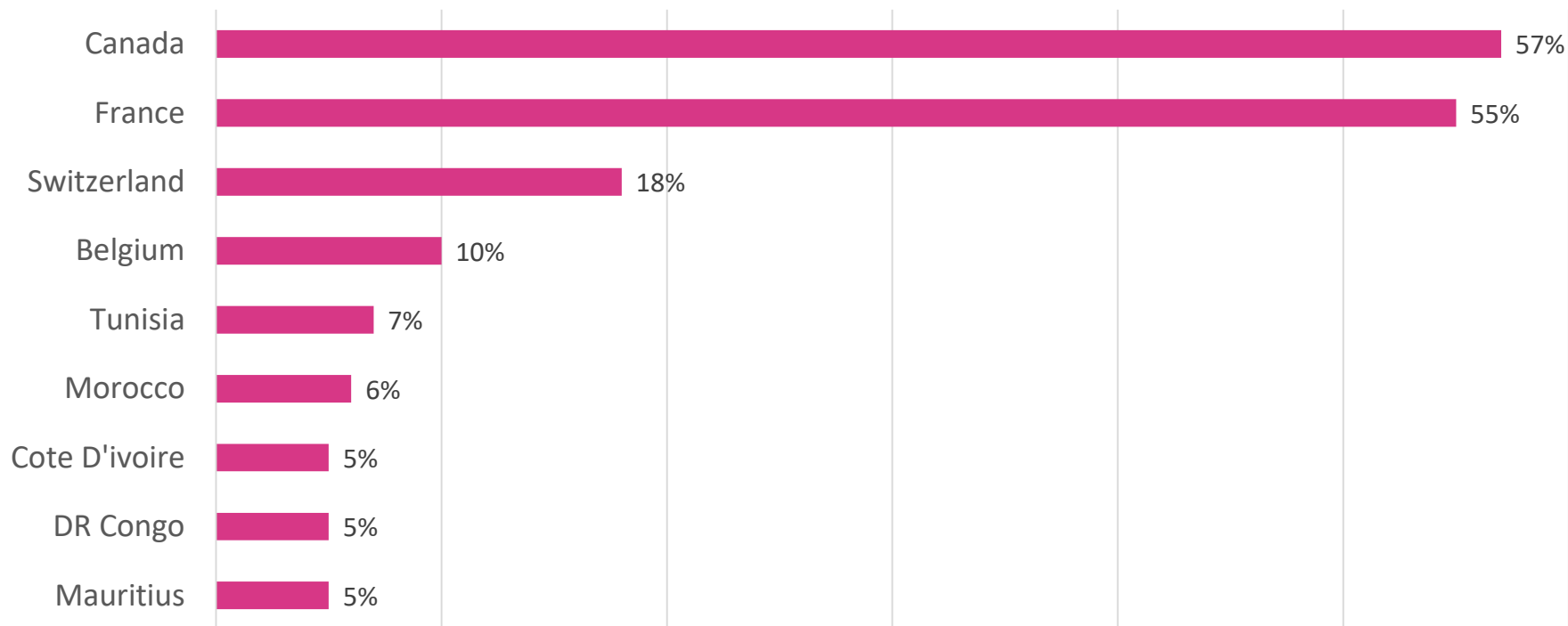
What are your top three countries to place students for the following language programmes?



Base no: 250

What are your top three countries to place students for the following language programmes?

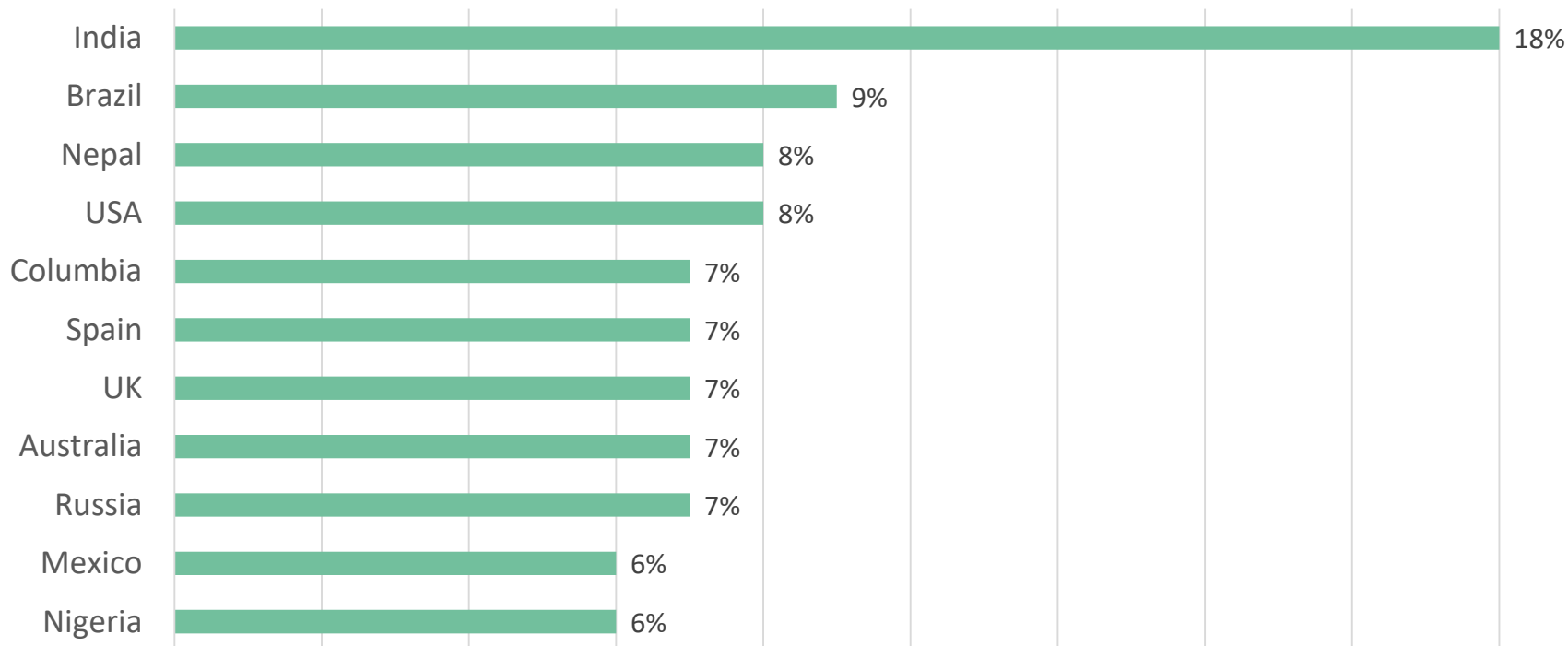
French Education Focus



Base no: 198

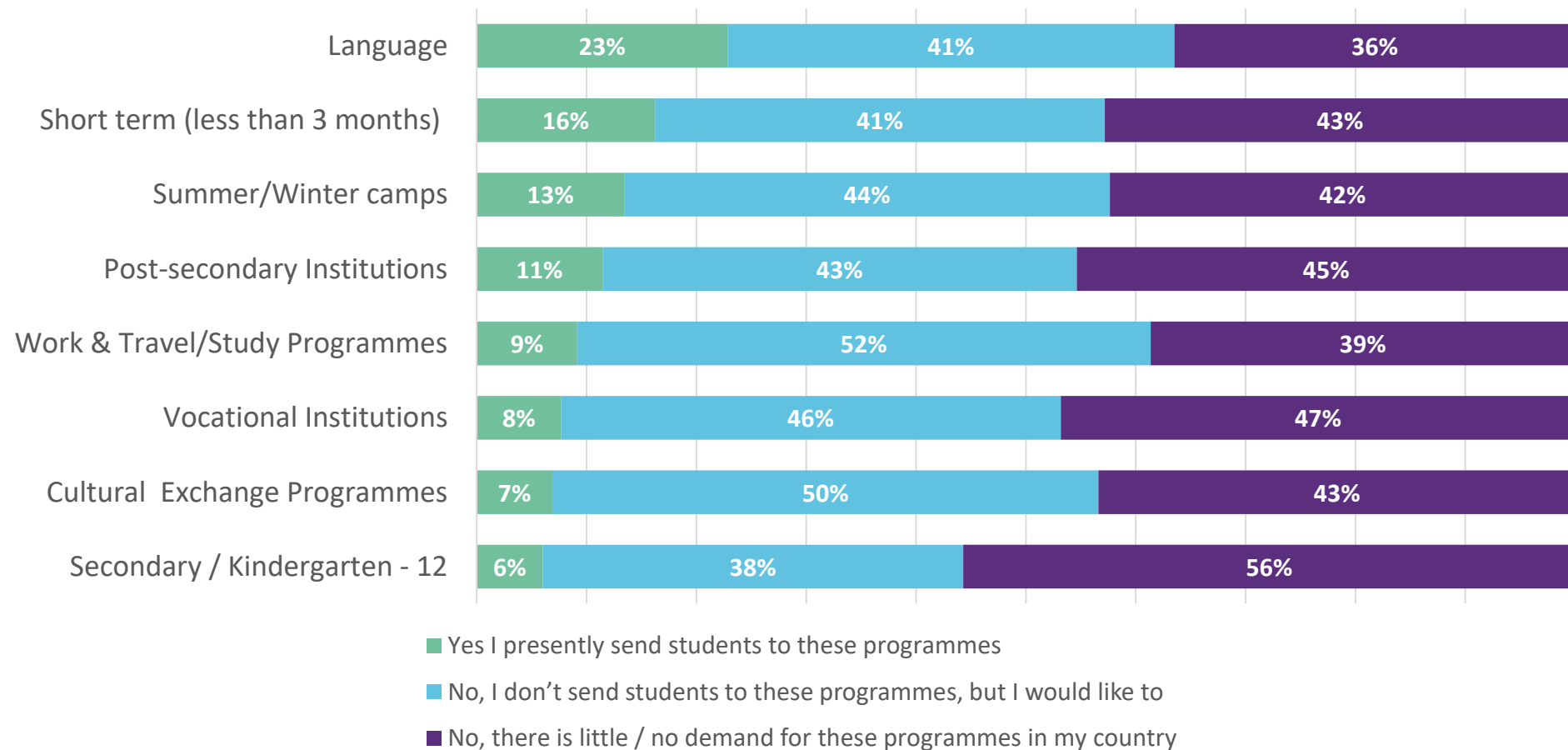
In which French-speaking countries are you recruiting? (prompted if answered yes to: Are you recruiting from French speaking countries?)

Recruitment from Non-French Speaking Countries for French Programmes



Base no: 392

Are you recruiting from non-French speaking countries for French Programmes? If yes, which countries?

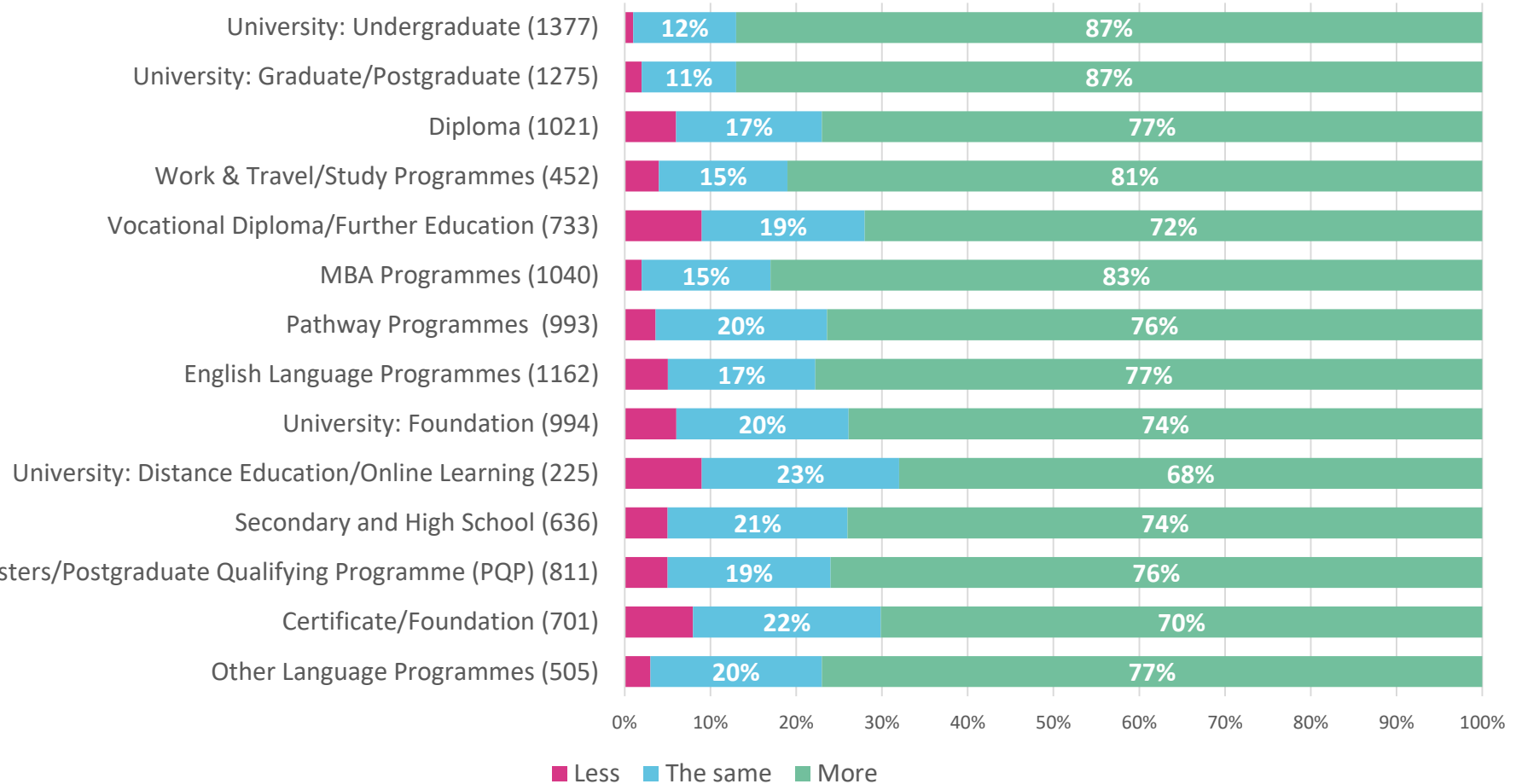


Base no: 1261

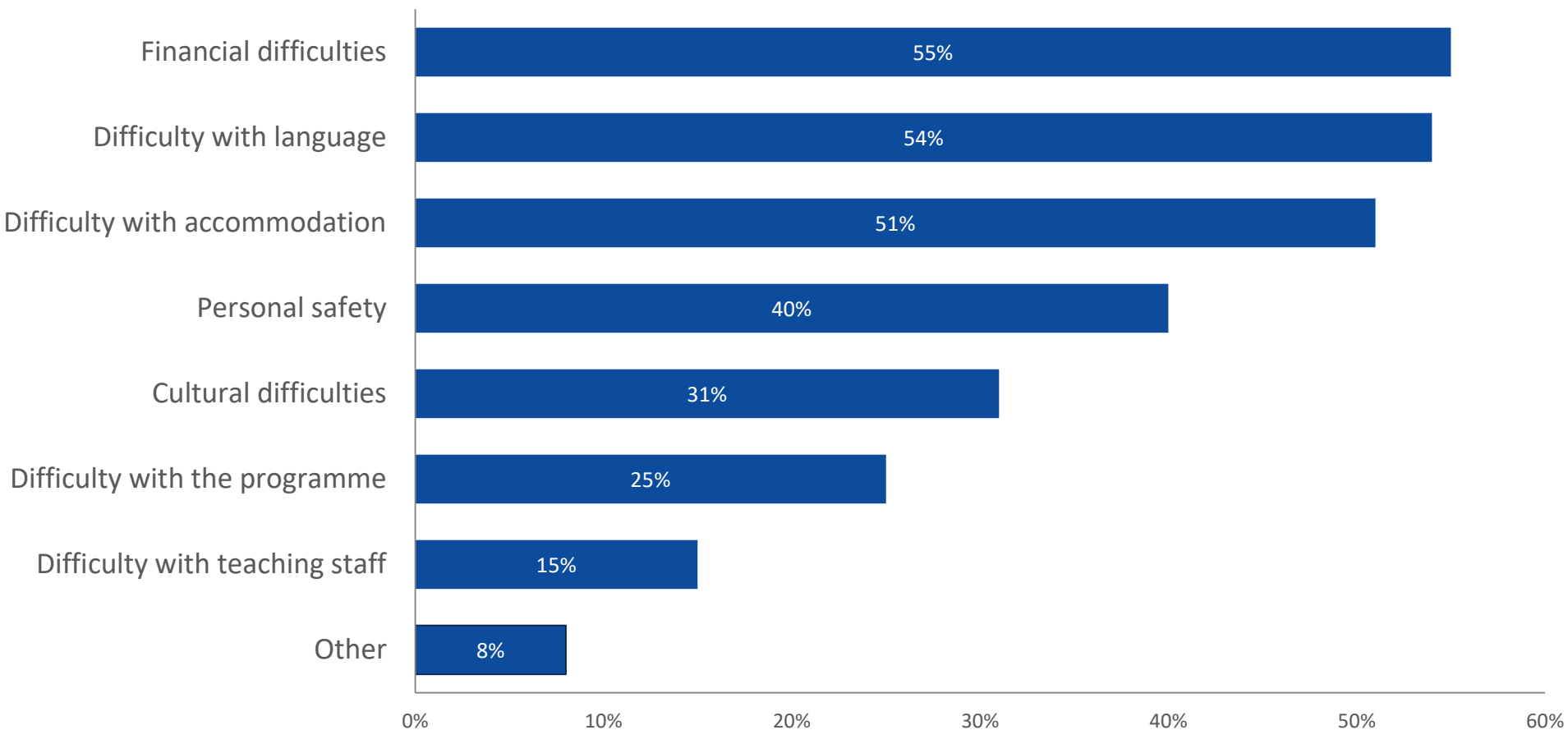
Are you presently sending students to study in a French Programme?

How Many Students do
Agents Expect to Place
in the Next 12 Months?

How many students do you expect to place in next 12 months – by Programme

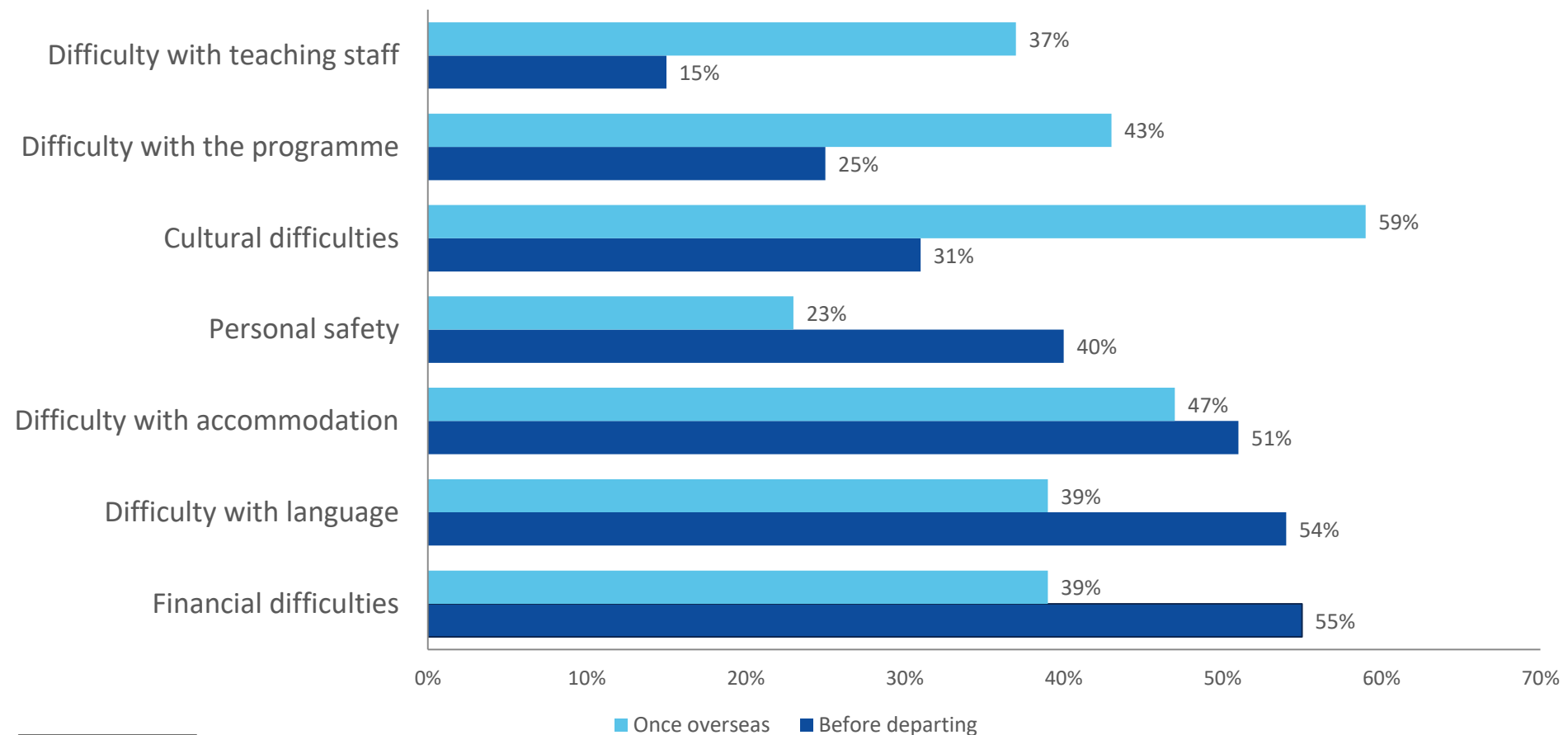


Student Mobility Concerns / Difficulties in 2019



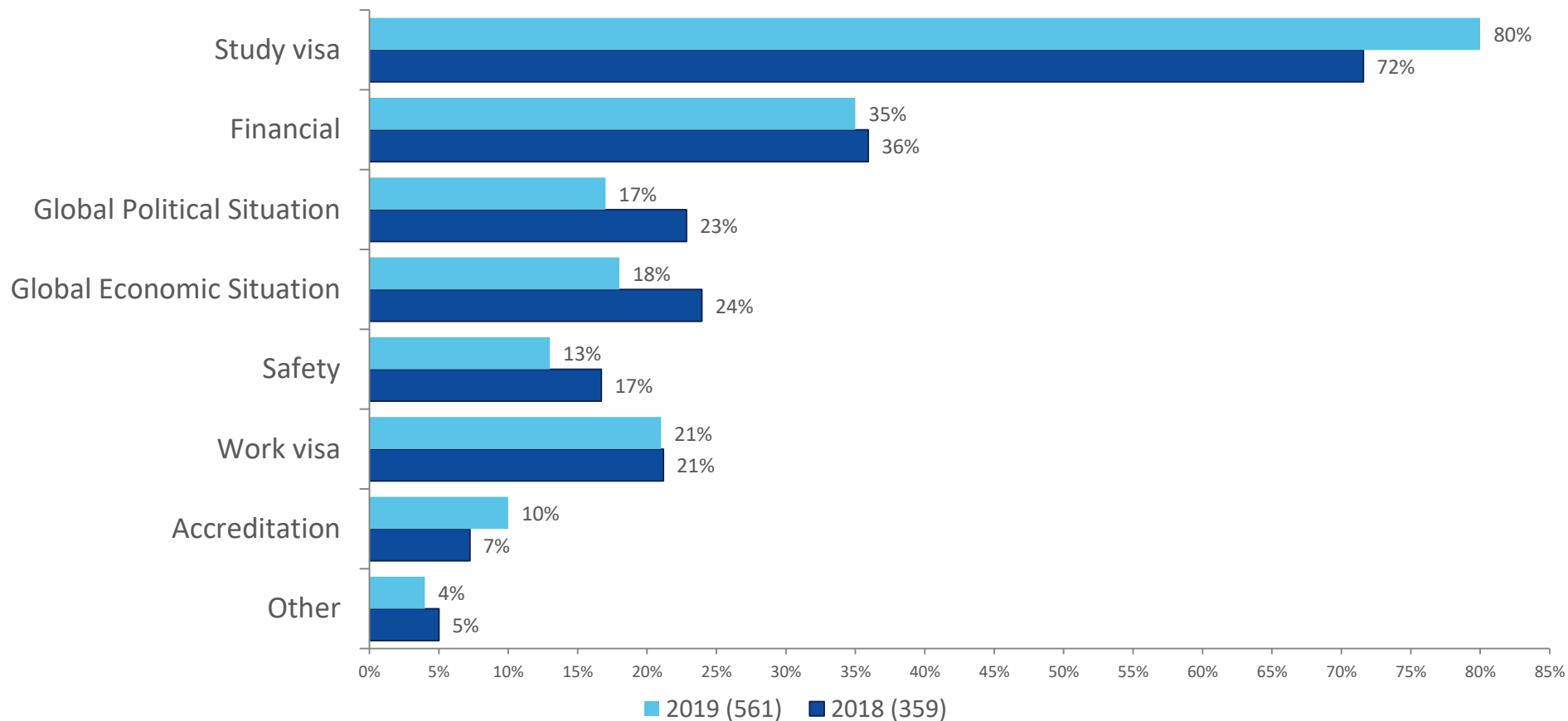
Base no: 917

What are the main concerns/questions/complaints students and parents have?



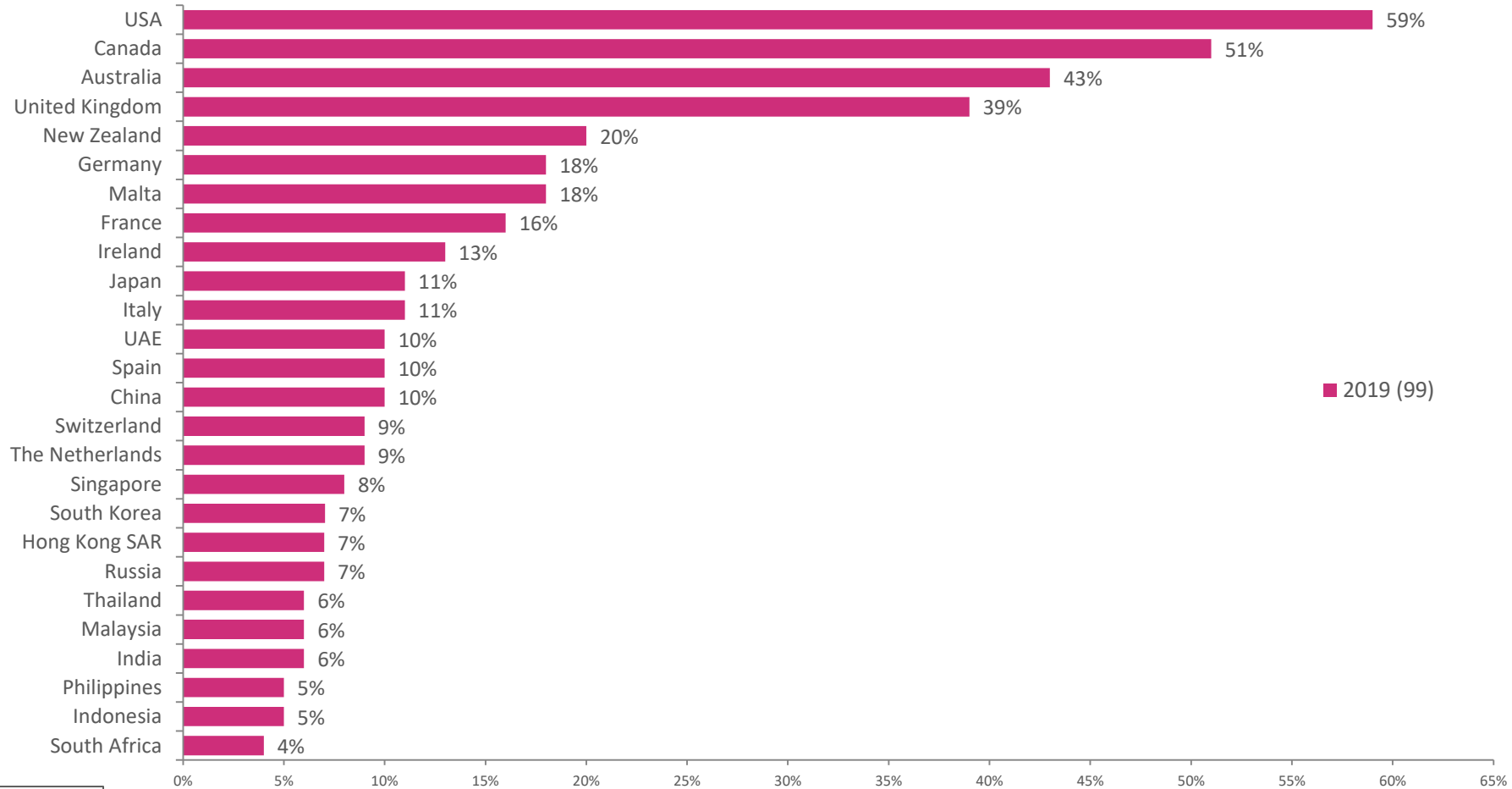
Base no: 870

What are the main concerns/questions/complaints students and parents have?



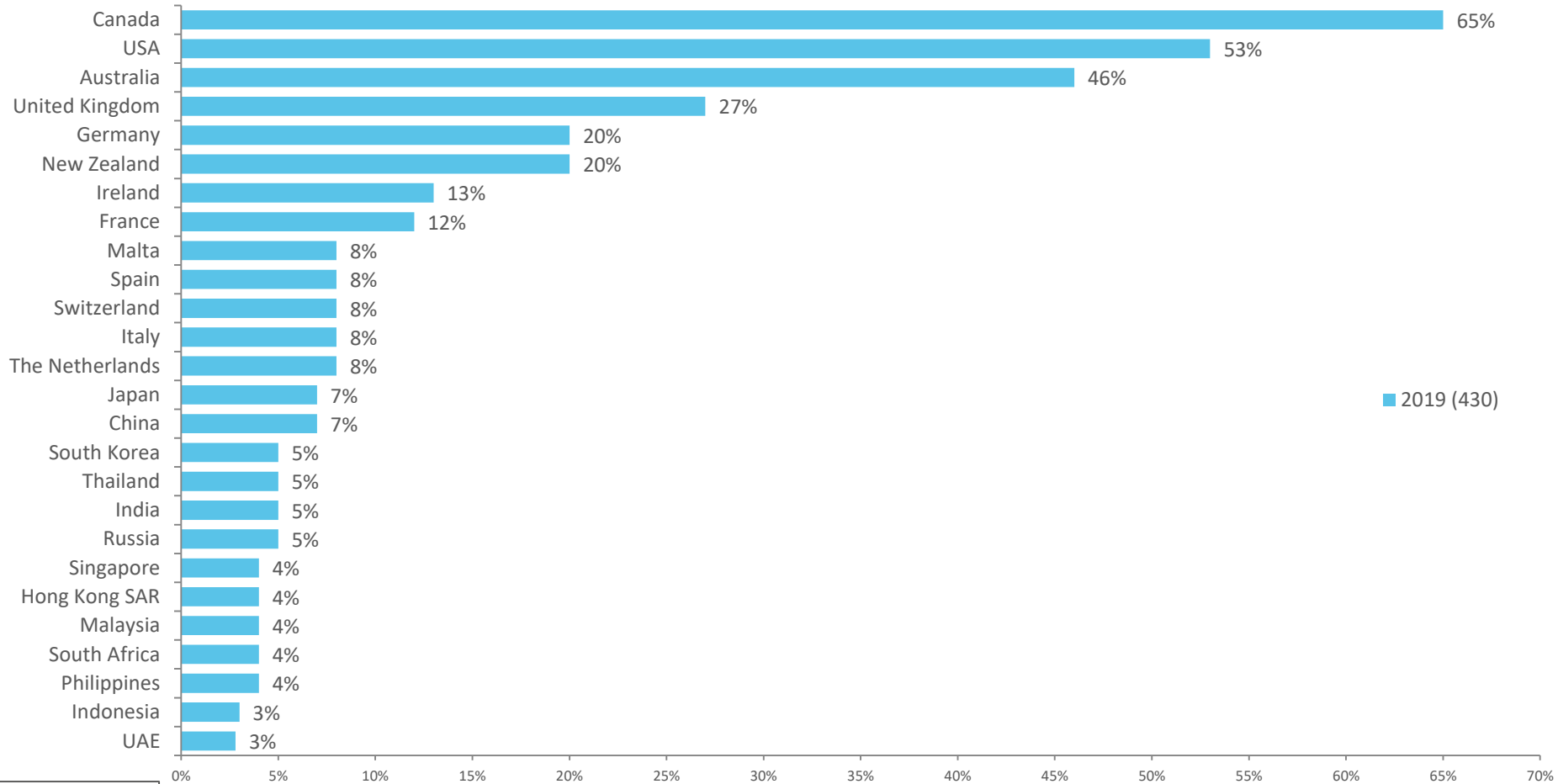
Base no: 651

Which student mobility concerns/difficulties did you encounter in 2019?



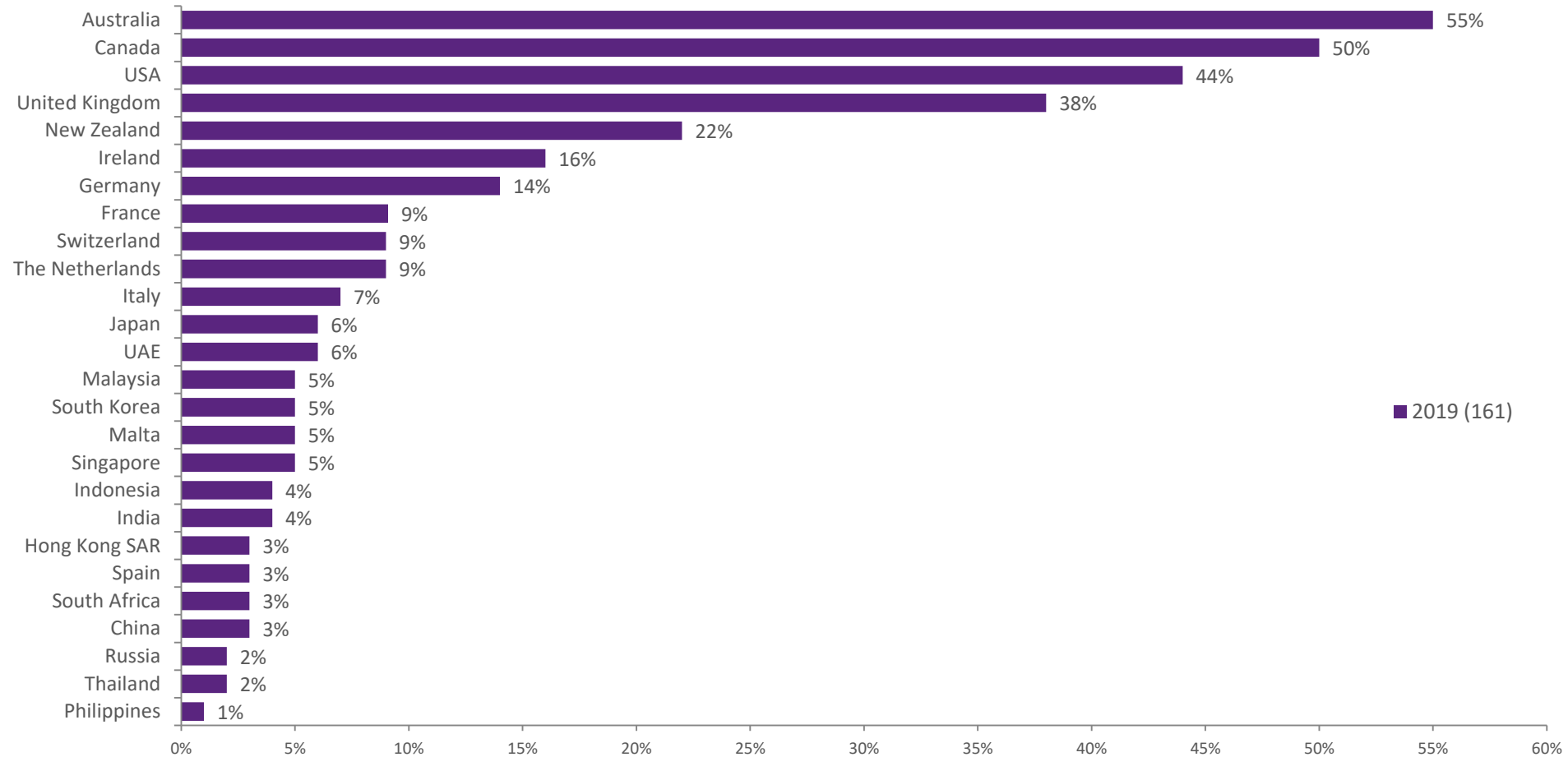
Base no: 99

In which countries did you experience these concerns/difficulties (Work Visa)?



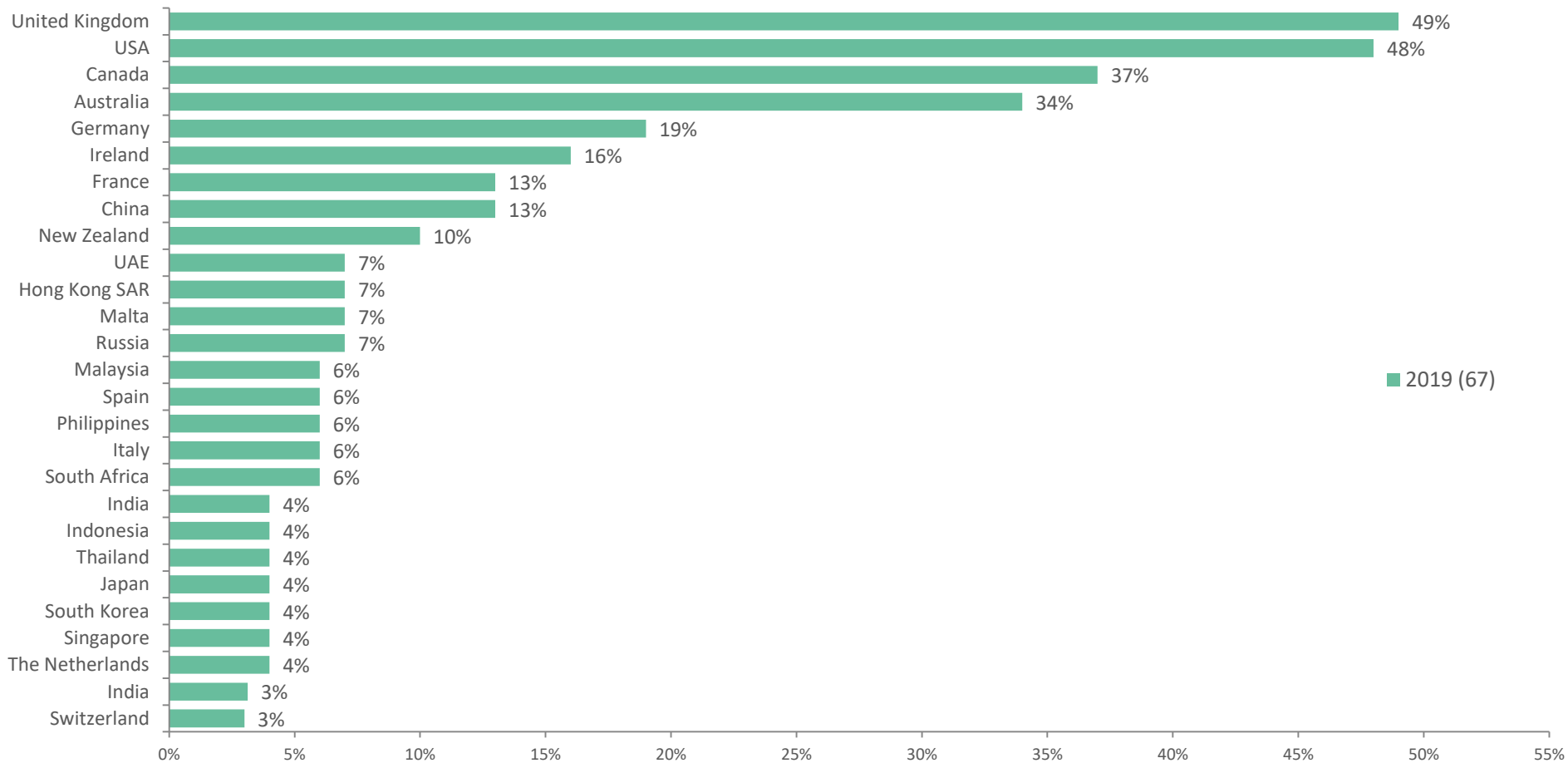
Base no: 430

In which countries did you experience these concerns/difficulties (Study Visa)?



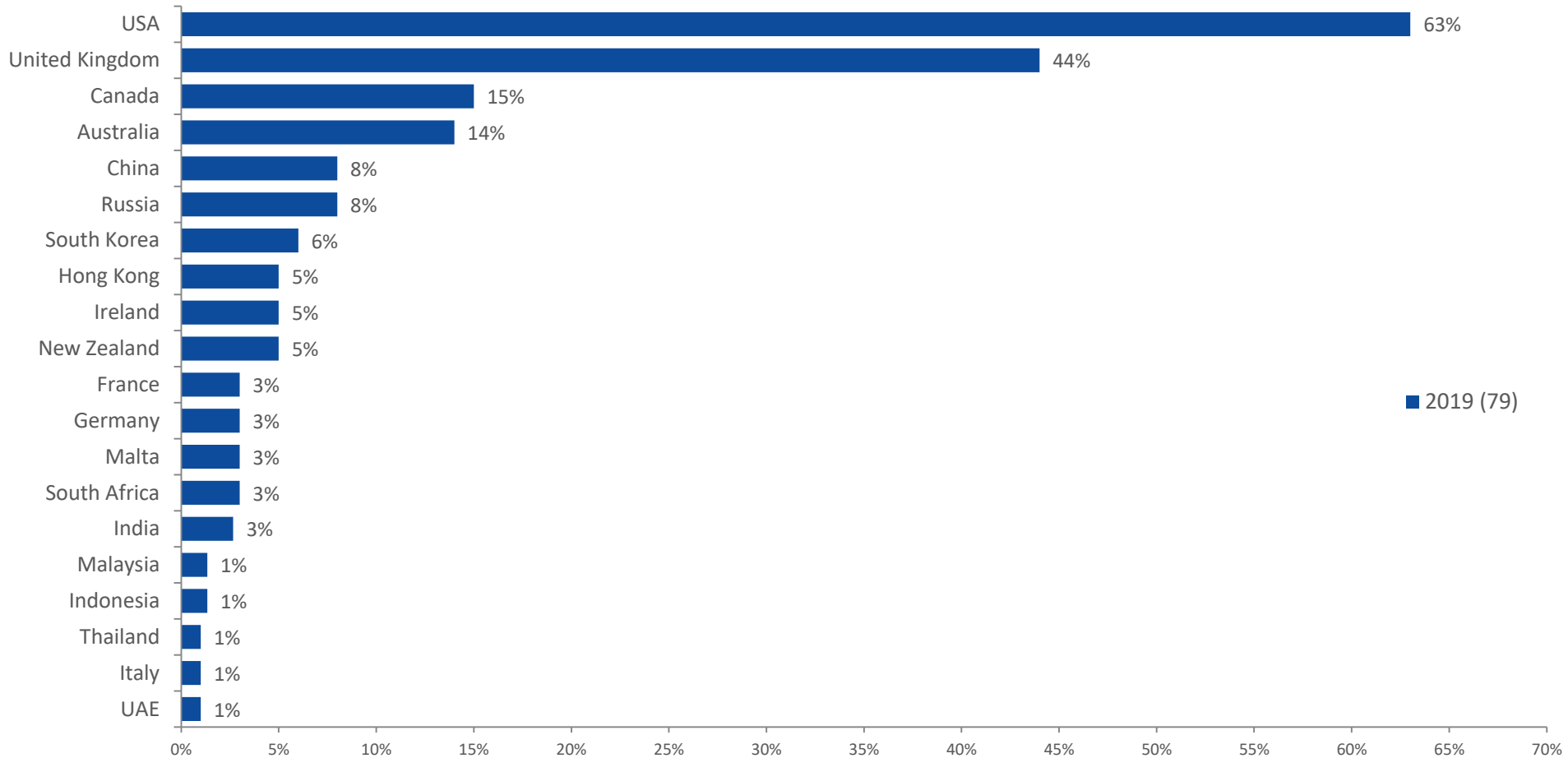
Base no: 161

In which countries did you experience these concerns/difficulties (Financial concerns)?



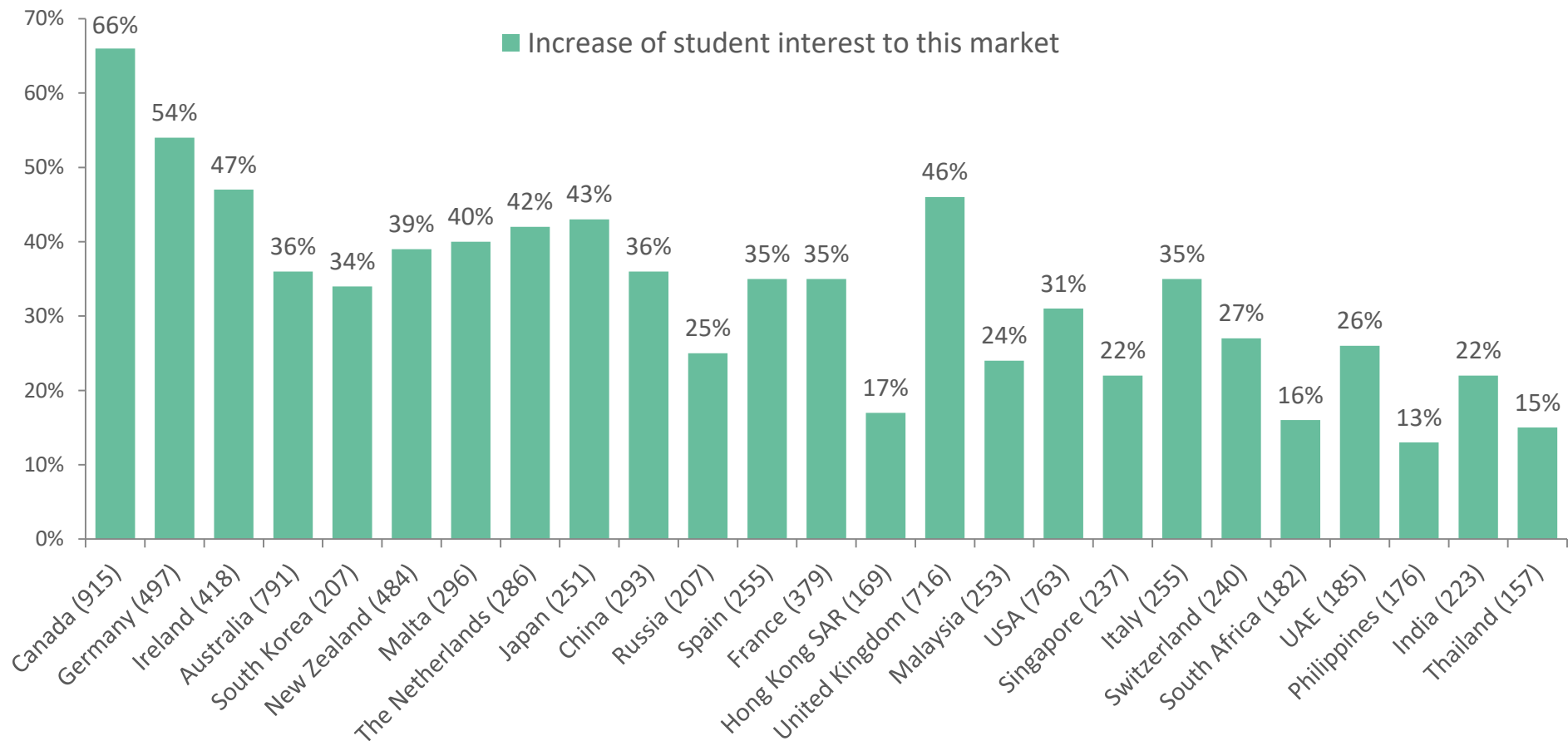
Base no: 67

In which countries did you experience these concerns/difficulties (Global Economic situation)?

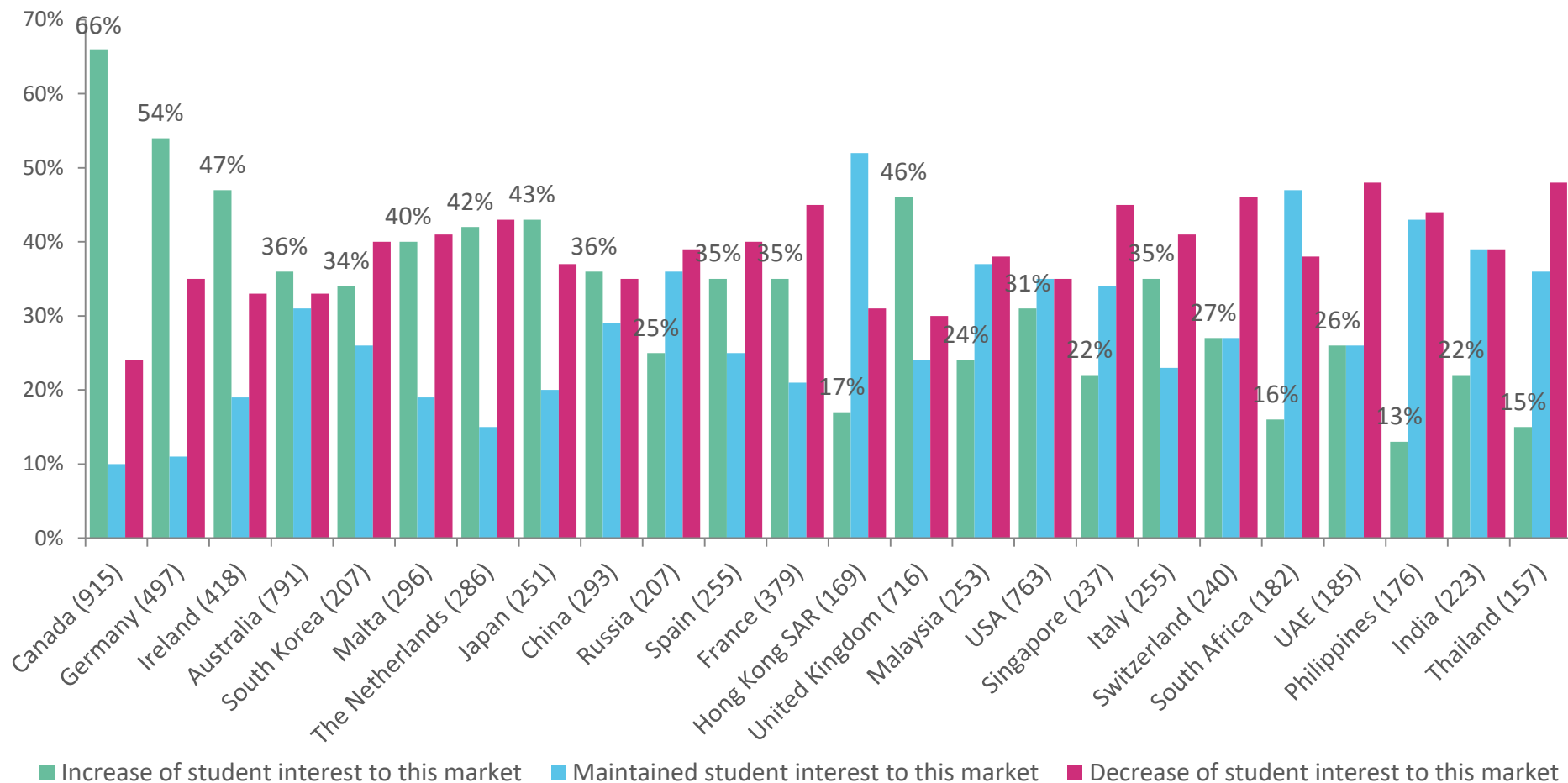


Base no: 79

In which countries did you experience these concerns/difficulties (Global Political situation)?



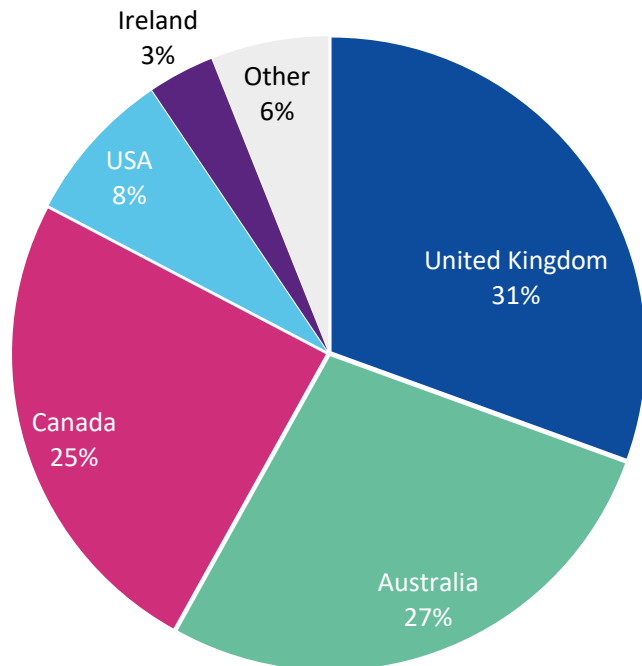
Over the last 12 months, have you experienced any market and student recruitment re-direction in the below countries?



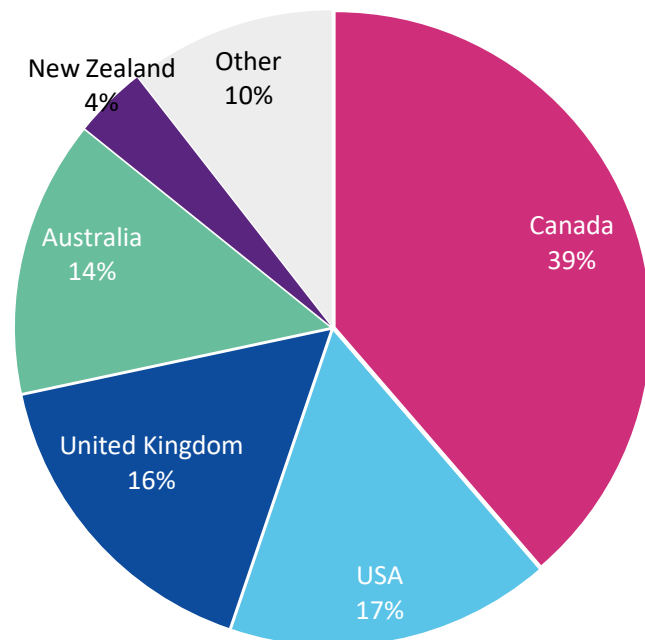
Over the last 12 months, have you experienced any market and student recruitment re-direction in the below countries?

Which Country is Best...? by type of study

Country	Rank 2019	Rank 2018	Rank 2017	Rank 2016	Rank 2015	Rank 2014	Rank 2013	Rank 2012	Rank 2011
United Kingdom	1	1	1	1	1	2	2	1	1
Canada	3	2	2	3	3	4	5	4	4
Australia	2	3	3	2	2	1	1	2	2
USA	4	4	4	4	4	3	3	3	3

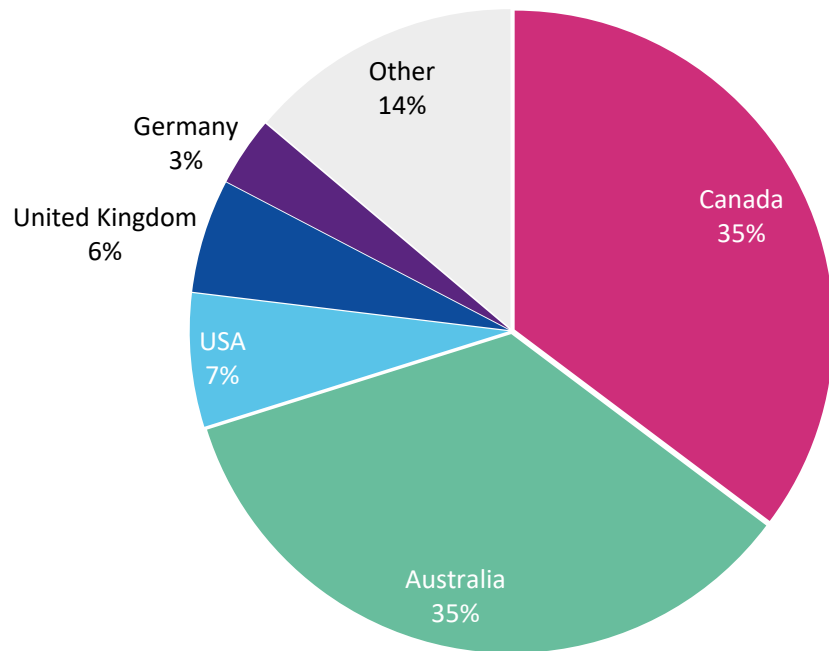


Country	Rank 2019	Rank 2018	Rank 2017	Rank 2016	Rank 2015	Rank 2014	Rank 2013	Rank 2012	Rank 2011
Canada	1	1	1	1	1	2	3	4	5
USA	2	2	2	3	3	1	1	2	3
United Kingdom	3	3	3	2	2	4	3	1	1
Australia	4	4	4	4	4	3	2	3	2
New Zealand	5	5	5	5	5	5	5	5	4



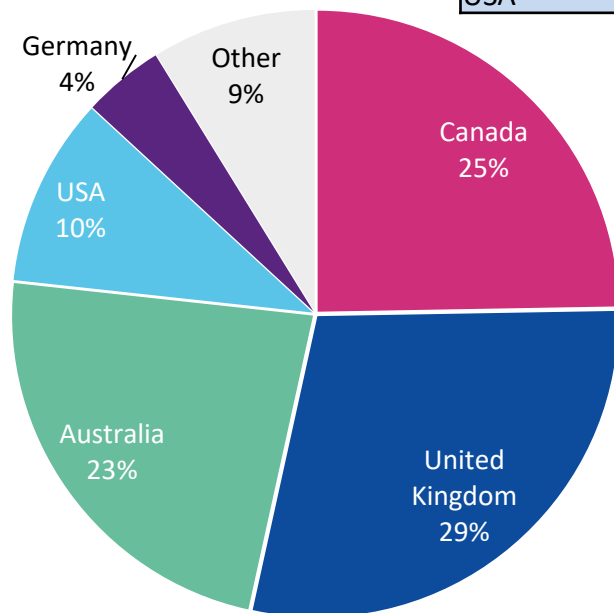
Secondary and High School (949)

Country	Rank 2019	Rank 2018	Rank 2017	Rank 2016	Rank 2015	Rank 2014	Rank 2013	Rank 2012	Rank 2011
Canada	1	1	1	2	2	2	2	3	2
Australia	2	2	2	1	1	1	1	1	1
USA	3	3	3	3	4	3	6	5	5
United Kingdom	4	4	4	4	3	4	3	2	2
New Zealand	6	5	5	5	5	3	3	4	4



Vocational diploma / Further education (888)

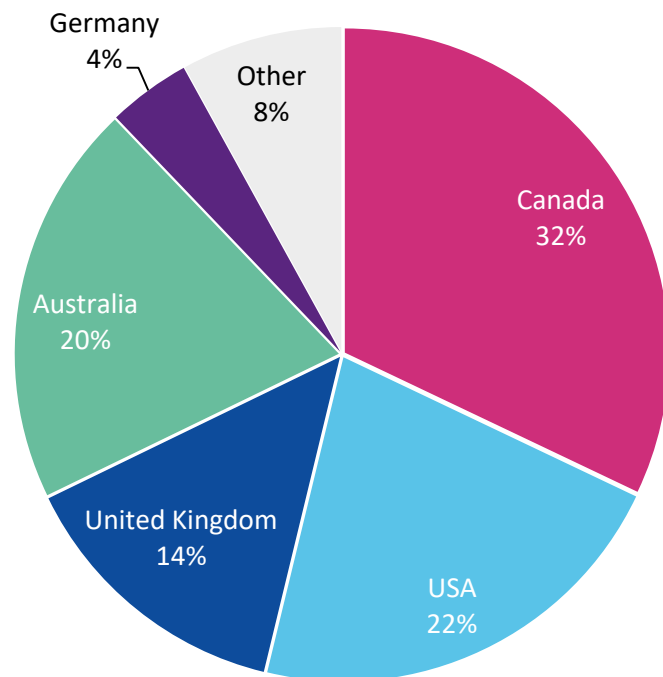
Country	Rank 2019	Rank 2018	Rank 2017	Rank 2016	Rank 2015	Rank 2014	Rank 2013	Rank 2012	Rank 2011
Canada	2	1	2	3	4	4	4	4	4
United Kingdom	1	2	1	1	1	1	2	1	1
Australia	3	3	3	2	2	2	1	2	2
USA	4	4	4	4	3	3	3	3	3



University: Foundation (898)

Best study destination for Undergraduate Study (University)

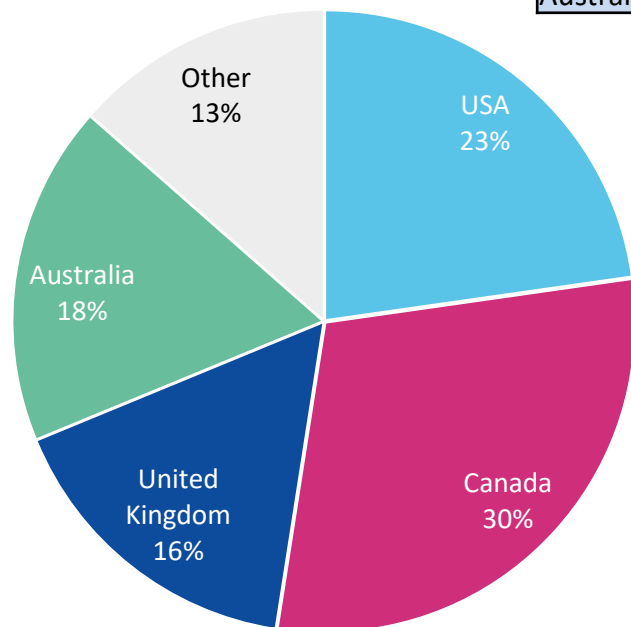
Country	Rank 2019	Rank 2018	Rank 2017	Rank 2016	Rank 2015	Rank 2014	Rank 2013	Rank 2012	Rank 2011
Canada	1	1	1	2	2	3	4	4	4
USA	2	2	2	1	1	1	2	1	1
United Kingdom	4	3	4	4	4	3	3	2	2
Australia	3	4	3	3	3	2	1	2	3



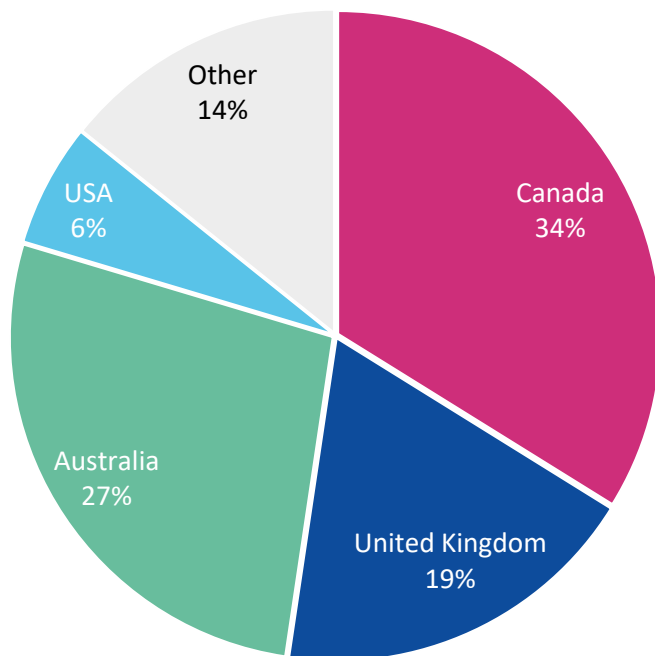
University: Undergraduate (946)

Best study destination for Graduate/Postgraduate Study (University)

Country	Rank 2019	Rank 2018	Rank 2017	Rank 2016	Rank 2015	Rank 2014	Rank 2013	Rank 2012	Rank 2011
USA	2	1	2	1	1	1	1	1	1
Canada	1	2	1	2	2	4	4	4	4
United Kingdom	4	3	4	4	3	3	3	2	2
Australia	3	4	3	3	4	2	2	3	3

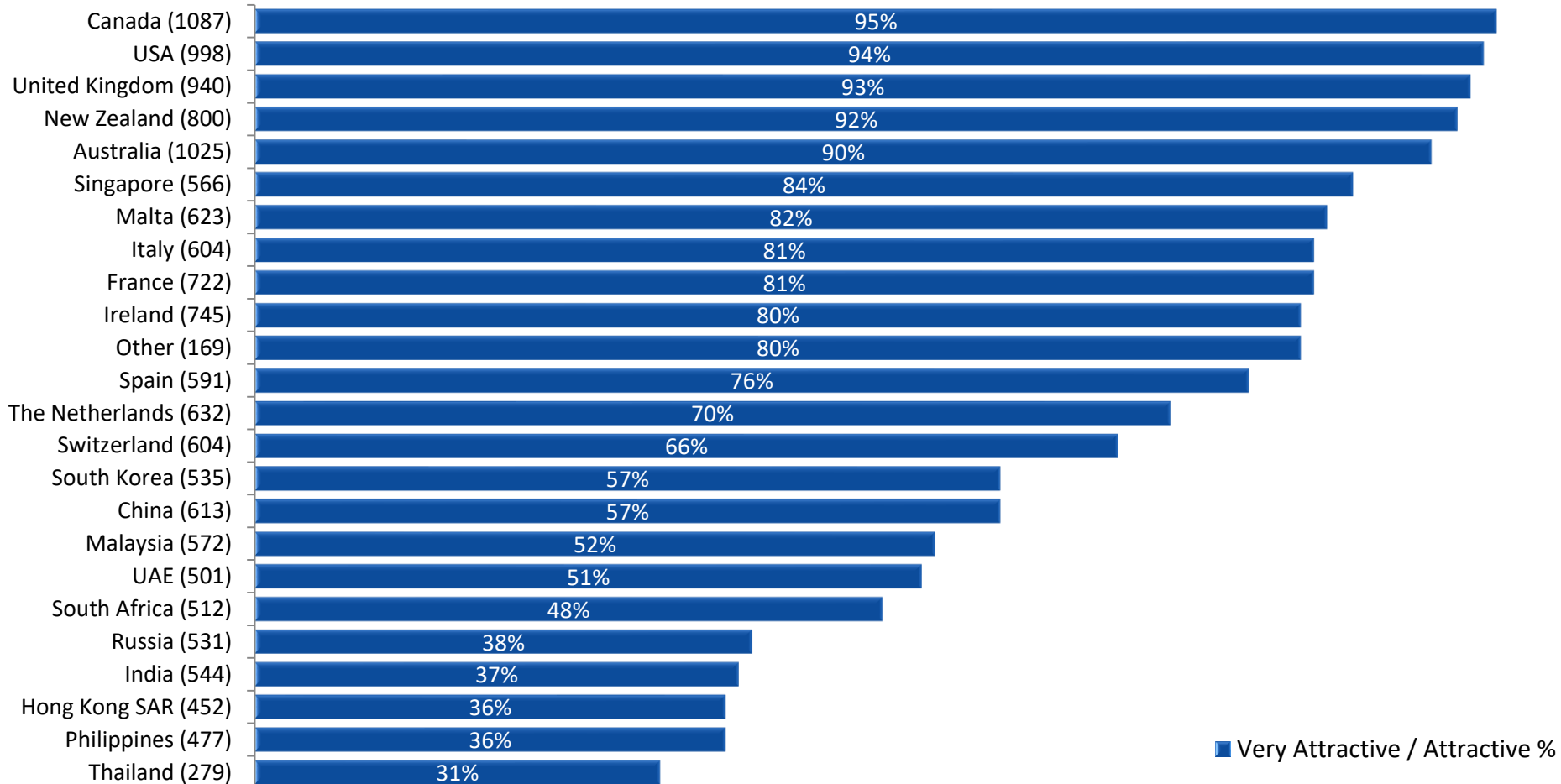


University: Graduate/ Postgraduate (932)

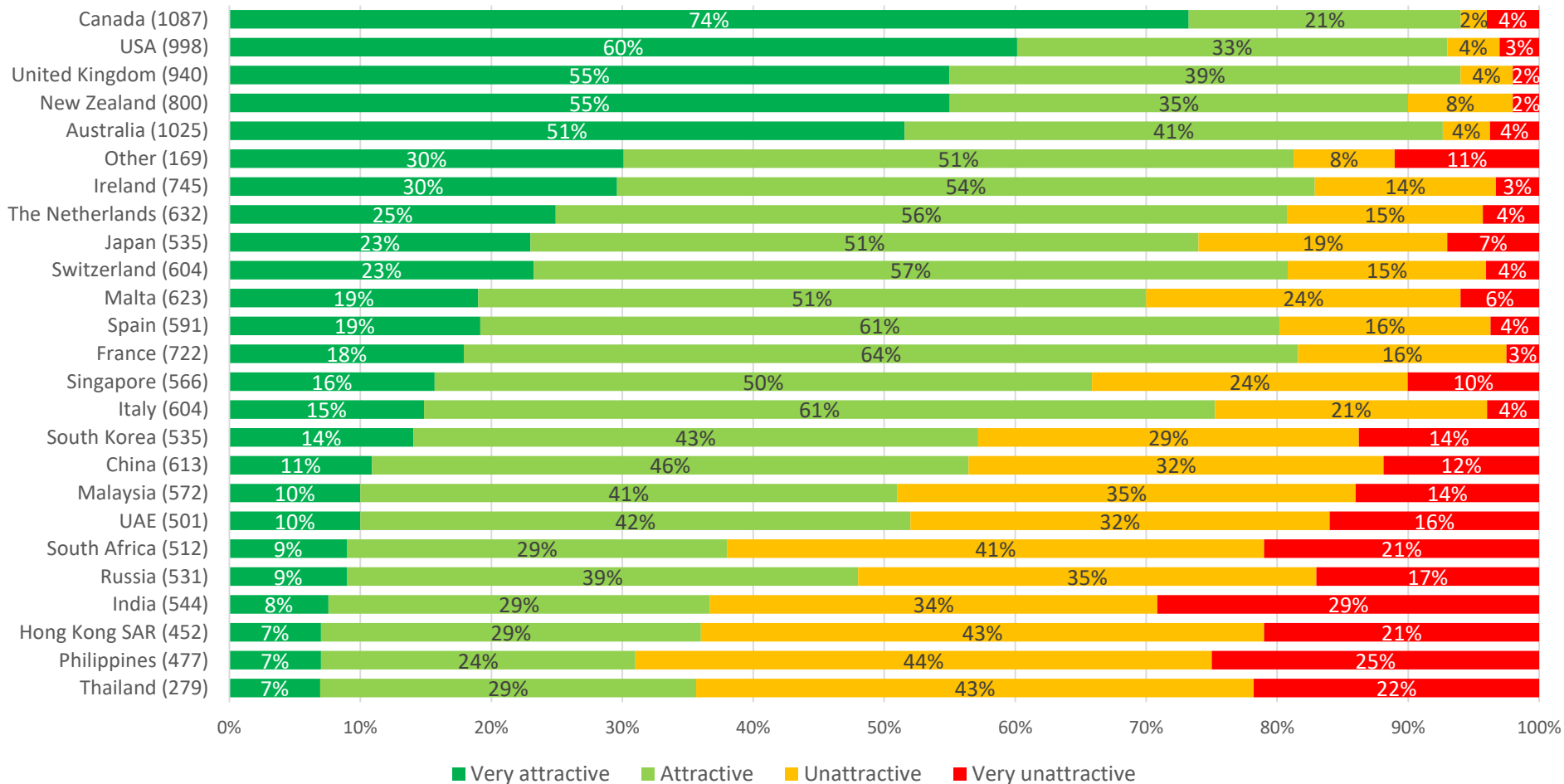


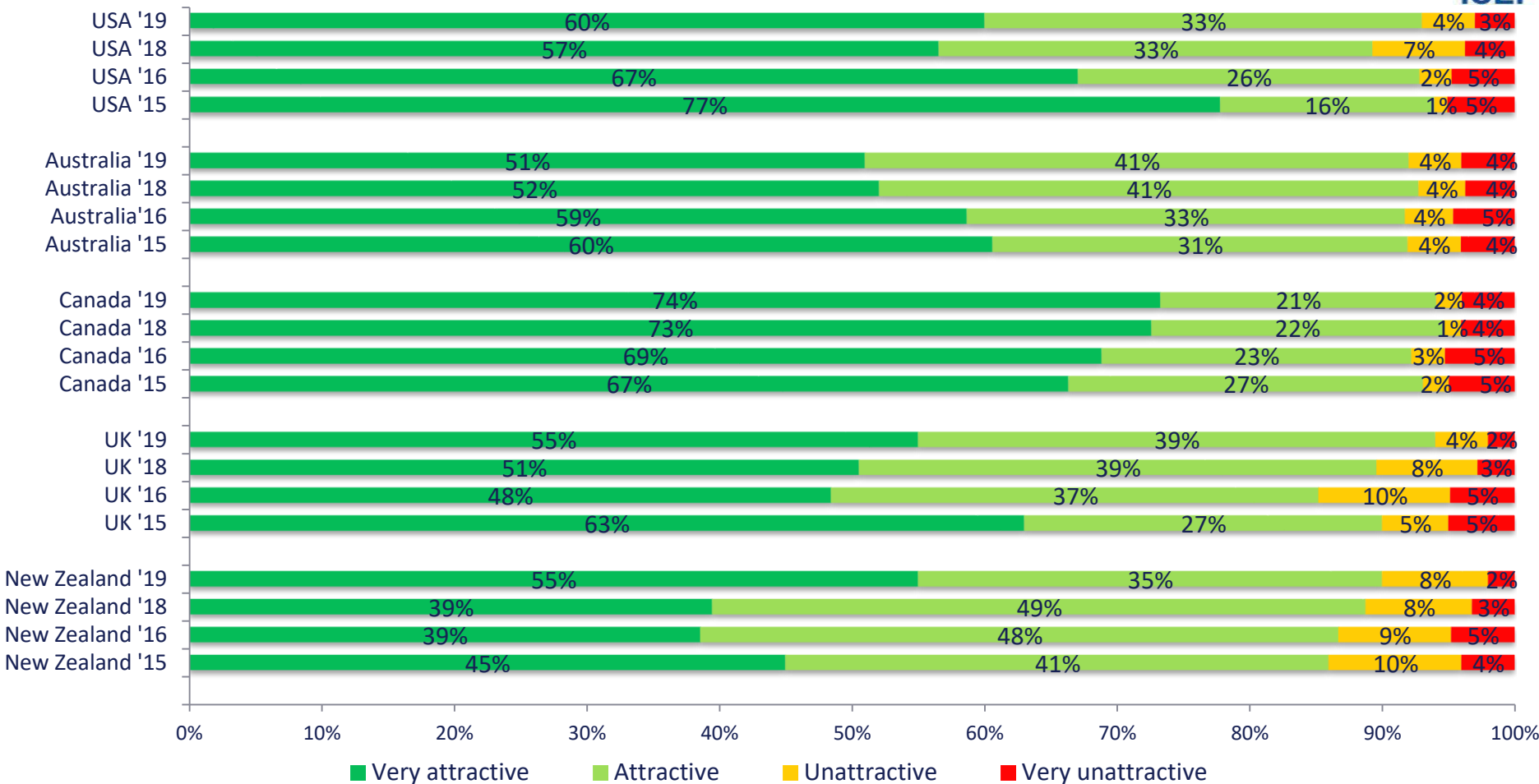
Country	Rank 2019	Rank 2018	Rank 2017	Rank 2016	Rank 2015	Rank 2014
Canada	1	1	1	2	3	3
United Kingdom	3	2	3	3	2	5
Australia	2	3	2	1	1	2
USA	4	4	4	4	4	1

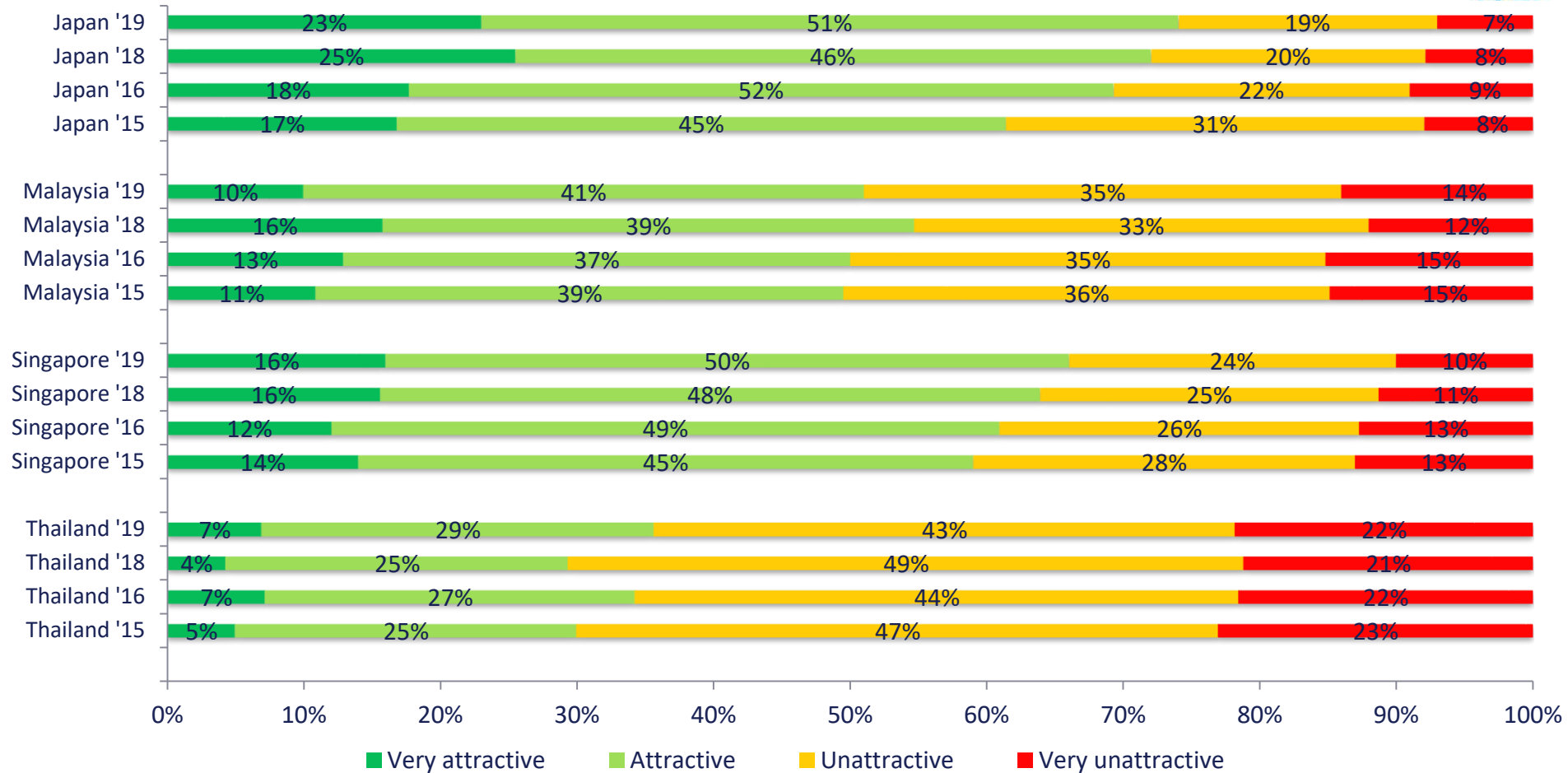
Overall attractiveness of study destinations 2015 - 2019



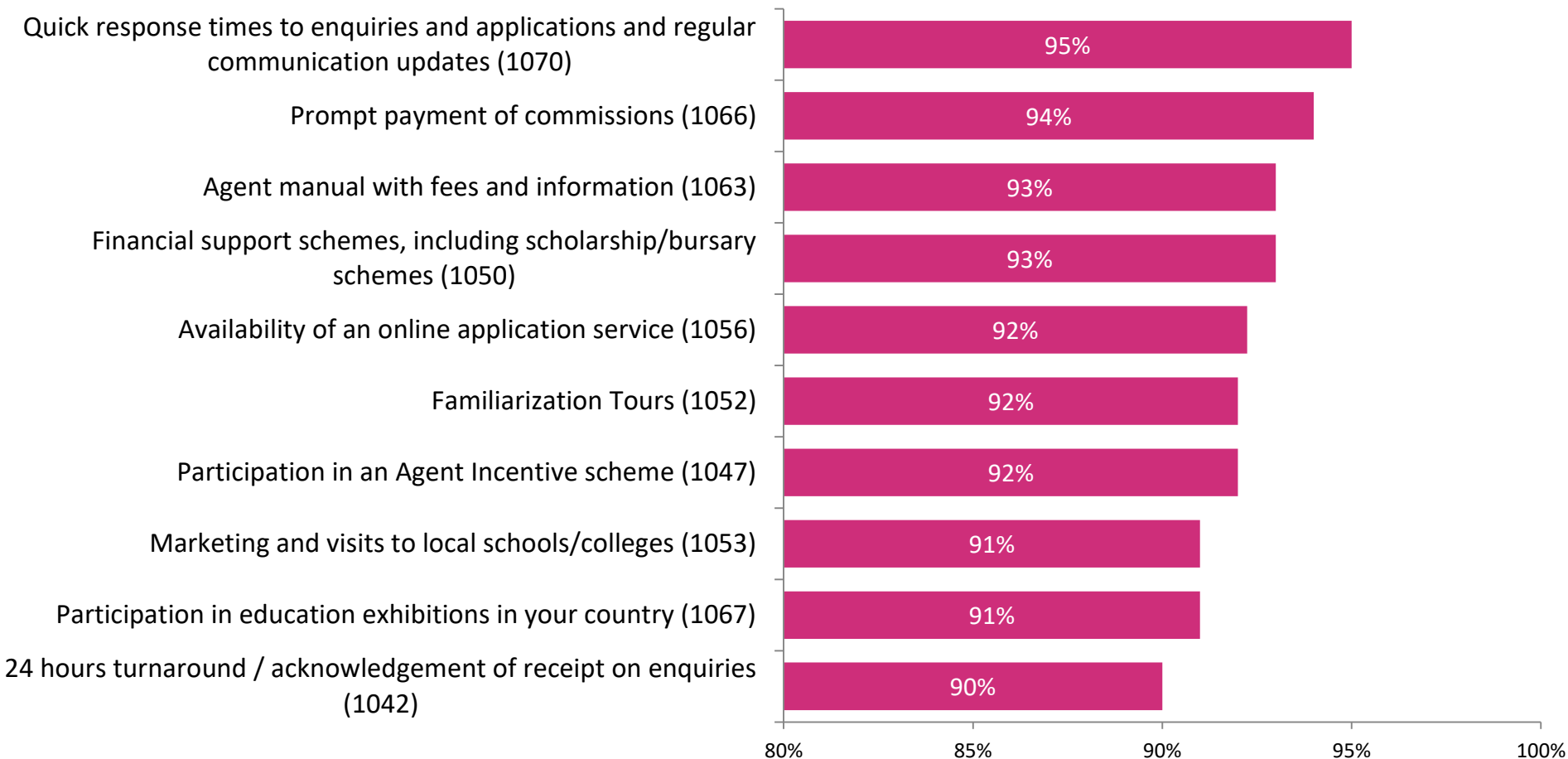
Please give your opinion on the overall attractiveness of the following countries as a study destination for students from your country:



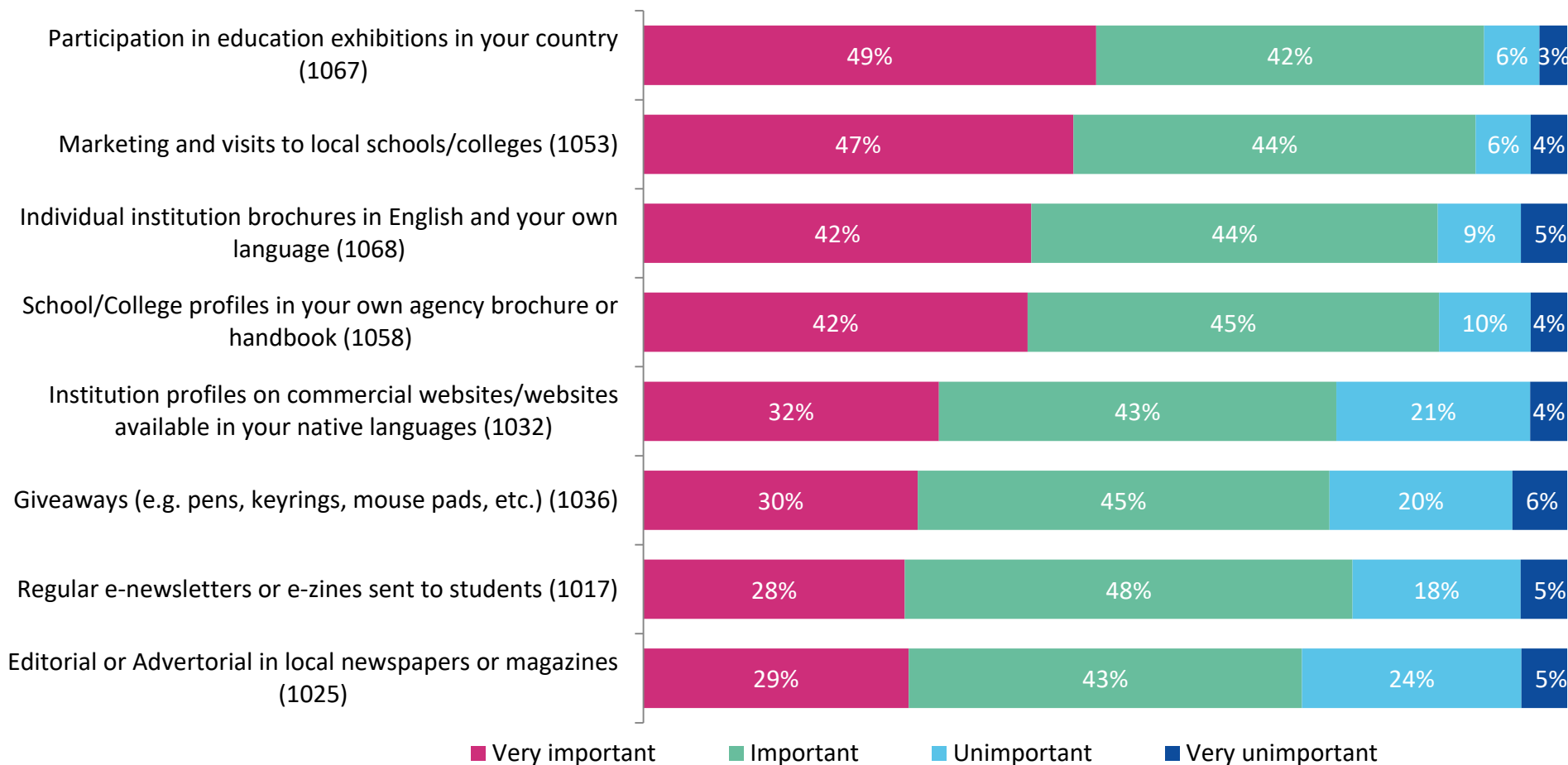




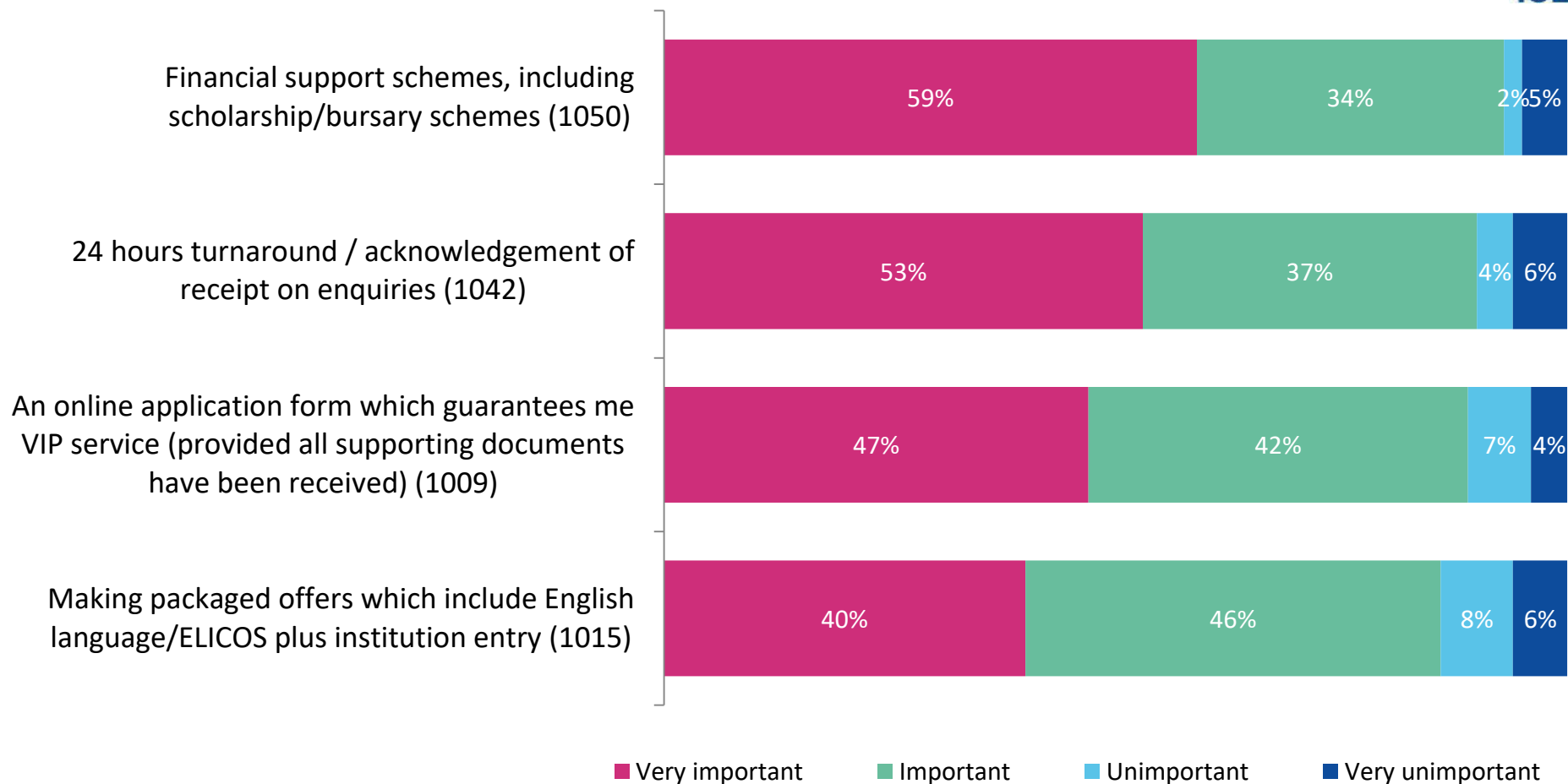
Marketing



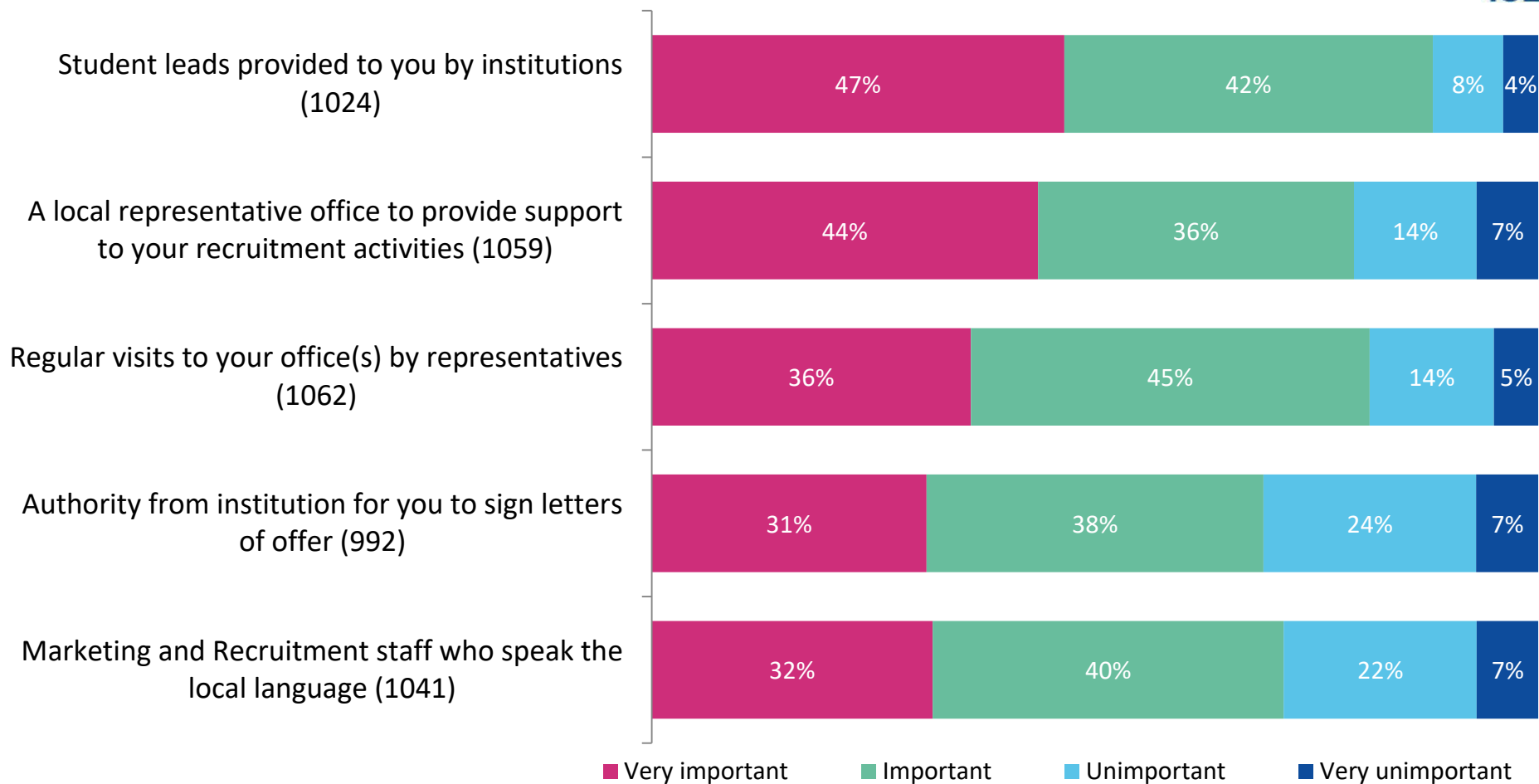
Please tell us how important the following criteria are (or could be) in terms of marketing for institutions:



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Please tell us how important the following criteria are (or could be) in terms of marketing for institutions:

Quick response times to enquiries and applications and regular communication updates (1070)

69%

26%

1% 4%

Familiarization Tours (1052)

51%

41%

4%

4%

Prompt payment of commissions (1066)

63%

31%

2%

4%

Agent manual with fees and information (1063)

55%

38%

3%

4%

Availability of an online application service (1056)

52%

40%

4%

3%

Participation in an Agent Incentive scheme (1047)

52%

38%

4%

4%

Regular visits by you and/or your staff to the education institution (1055)

45%

45%

6%

4%

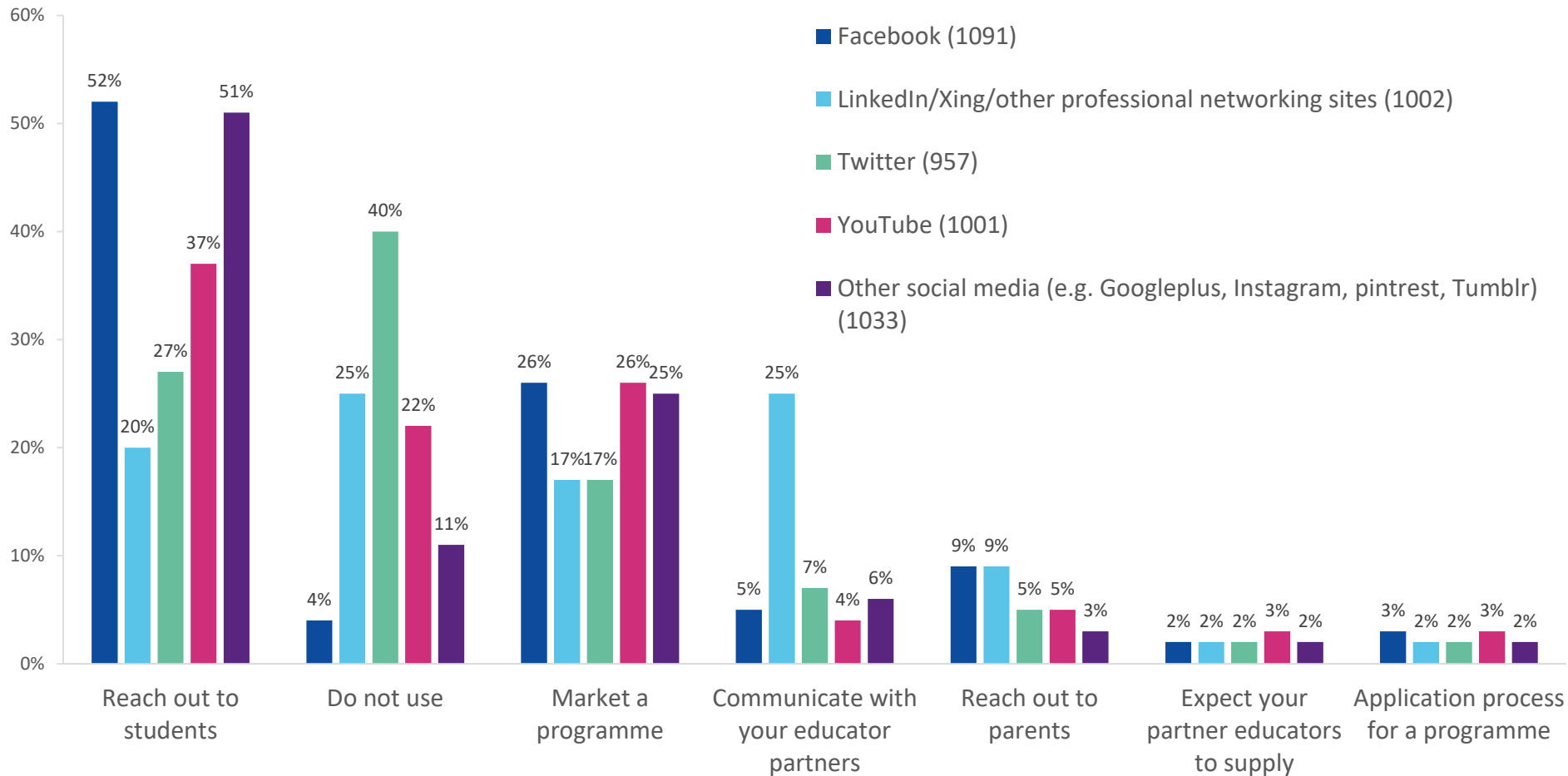
Very important

Important

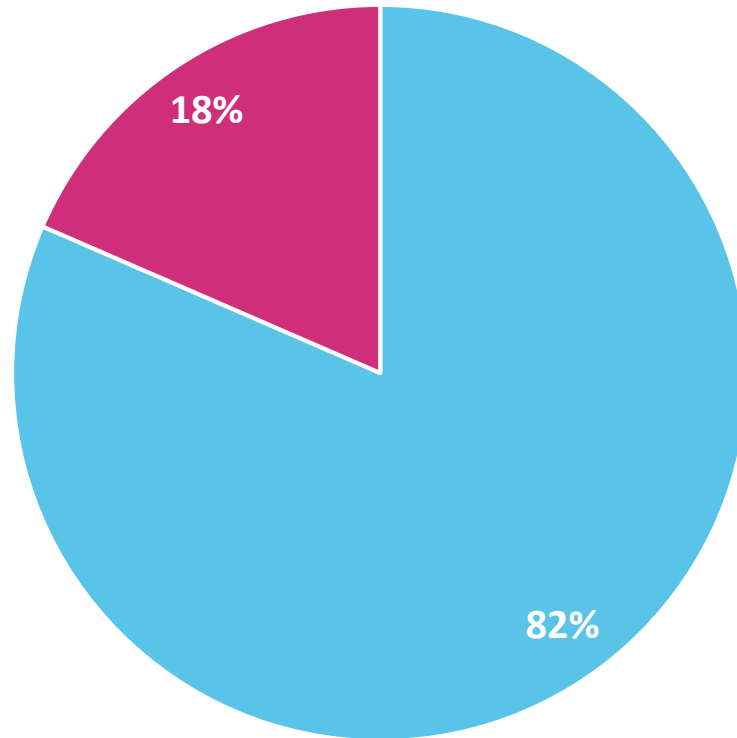
Unimportant

Very unimportant

Please tell us how important the following criteria are (or could be) in terms of marketing for institutions:

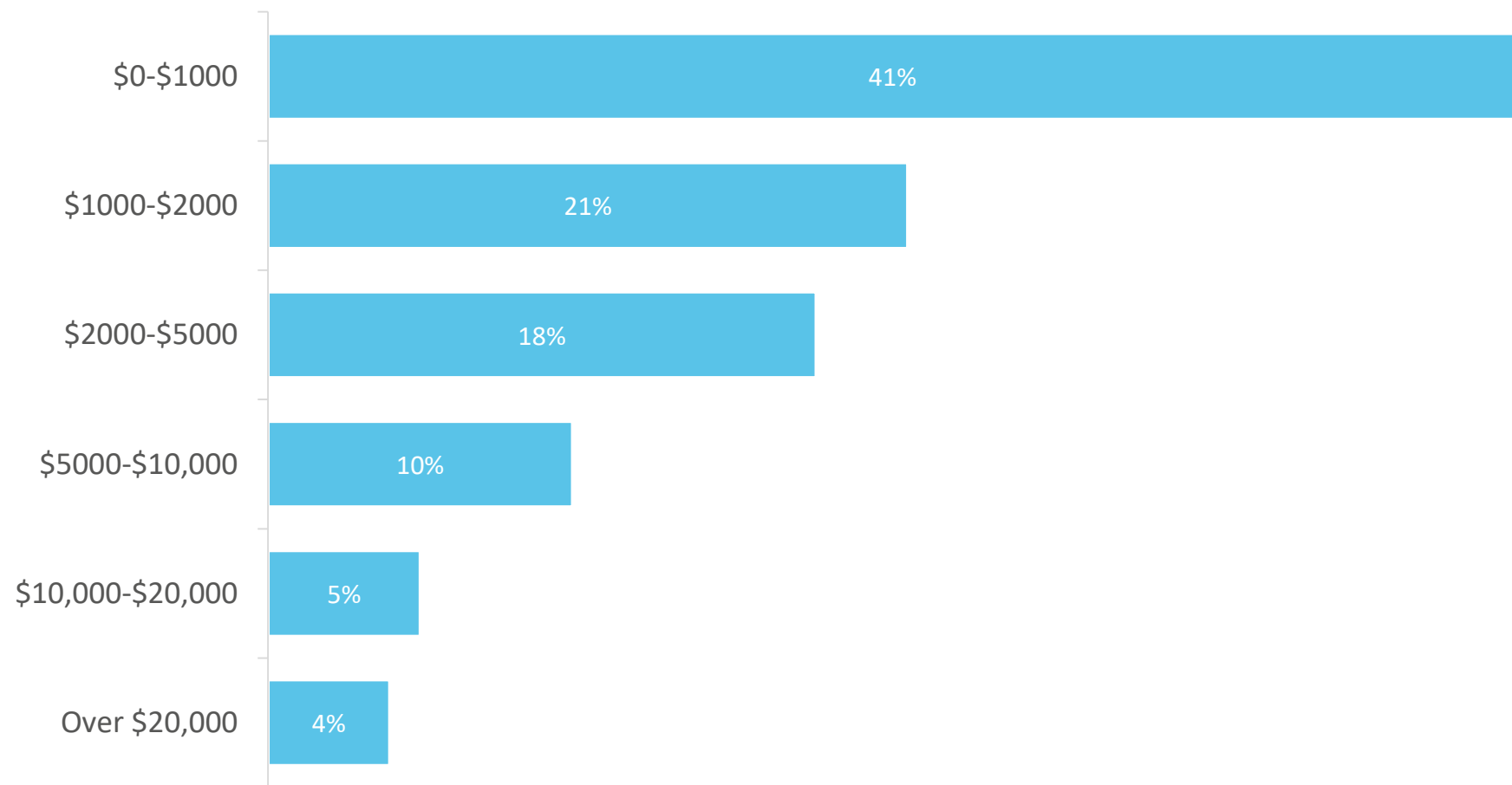


What type of marketing communication do you use to reach your clients?



■ Yes ■ No

Base no: 1109



Base no: 1090

How much is your combined annual spend on these channels? (Google Adwords, Google display ads, Facebook, Twitter, LinkedIn, Bing ads)

Thank you!

A copy of this presentation will be available after the conference –
for easy access and download

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