

## The i-graduate ICEF Agent Barometer 2014

- Sarah Mines & Caroline Levesque ICEF Canada
- Languages Canada Conference Gatineau, Quebec March 1 – 4, 2015





#### The i-graduate ICEF Agent Barometer



www.i-graduate.org

- Online survey developed in partnership by i-graduate & ICEF
- Stablished in 2007, the ICEF Agent Barometer has tracked the opinions of agents across the world for 8 years
- The 2014 study ran for 3 weeks during October
- I,065 agents responded from 104 countries in this wave.





## Agent Barometer 2014: *Profile of respondents*







#### • **104** nationalities represented in this years survey.

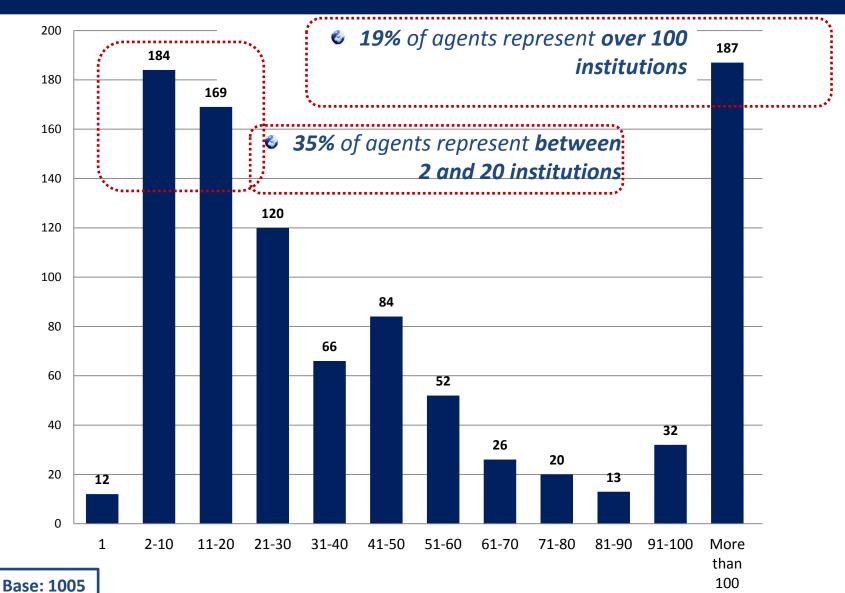
India	87
China	84
Russia	69
Brazil	59
Nepal	51
Nigeria	43
Pakistan	40
Vietnam	36
Ukraine	35
UK	29

Spain	26
Canada	23
Australia	21
Italy	21
Saudi Arabia	20
Colombia	20
Turkey	19
Mexico	16
Iran	15
Germany	15



# Approximately how many institutions does your company represent?



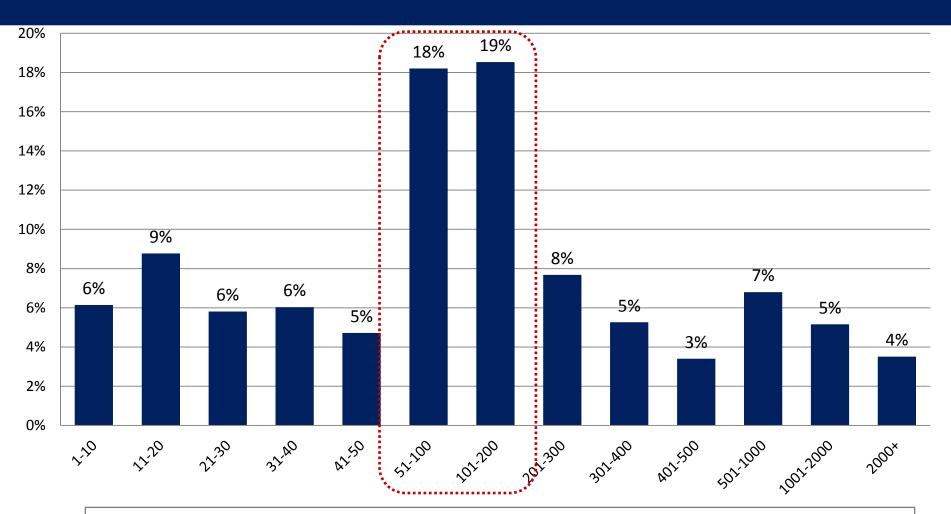


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#### Size of agents – Total placements





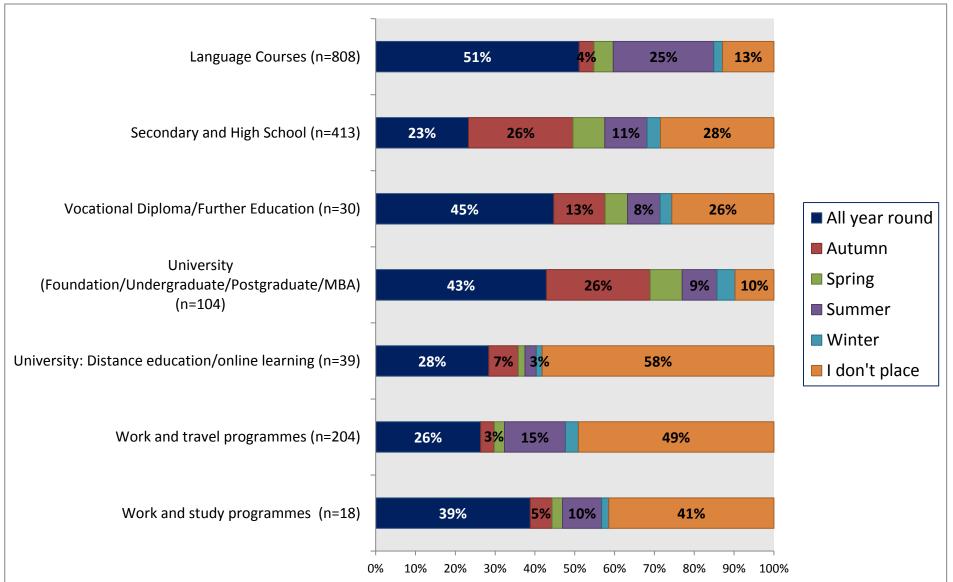
The greatest proportion of agents are placing between **51 and 200 students** annually.

N.B. The agents that either indicated no placements or who skipped this question have not been included in the above chart



# What time of the year do you traditionally place the most students in?

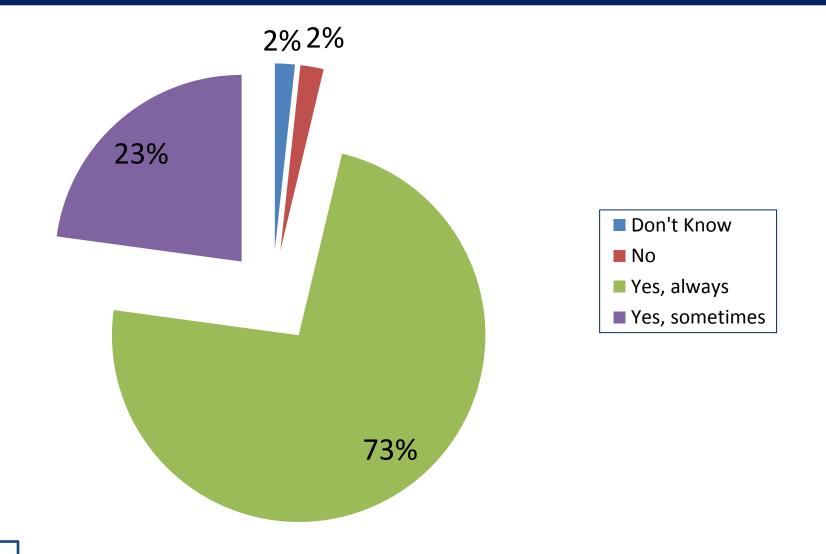






Do you have contracts in place with the institutions you work with?





Base: 696





## Scope of activity

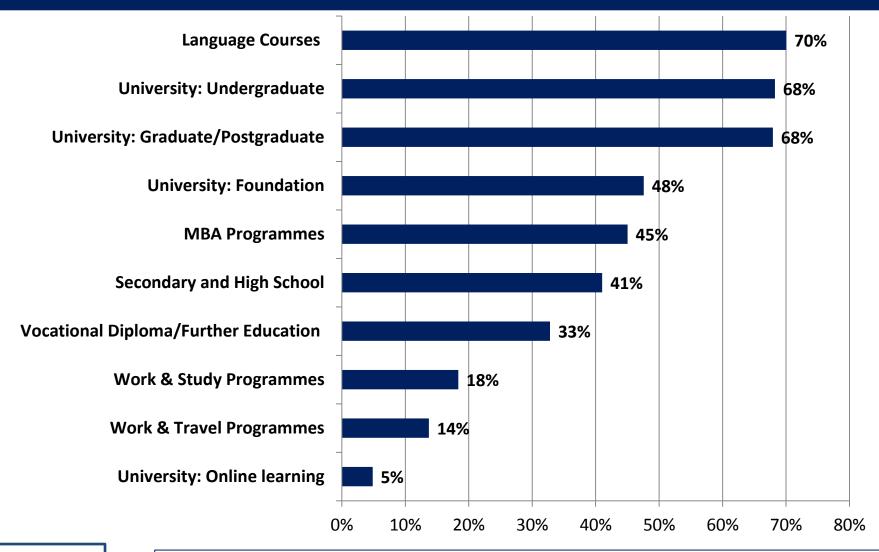






#### For which types of study do you recruit students?





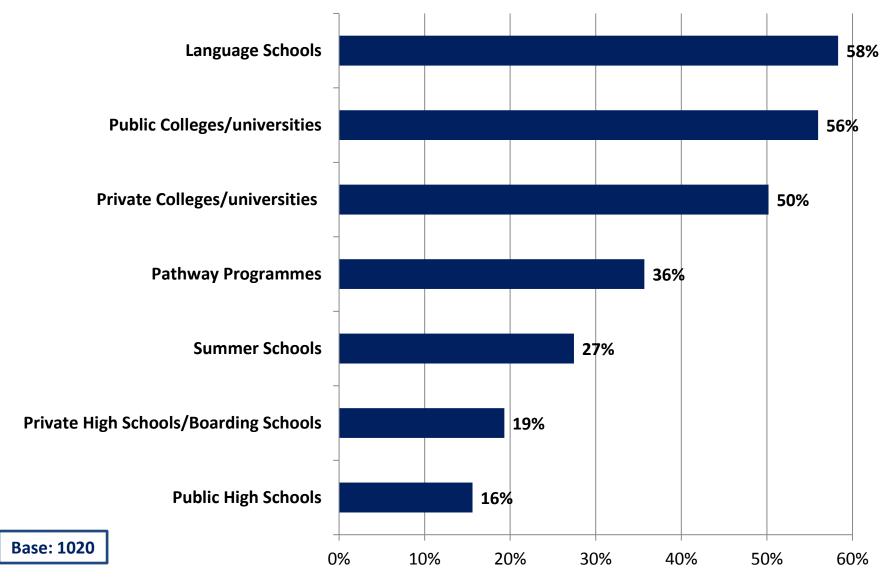
Base: 948

Language courses remain the largest market, followed by University UG and PG degrees.



### Placing students into...

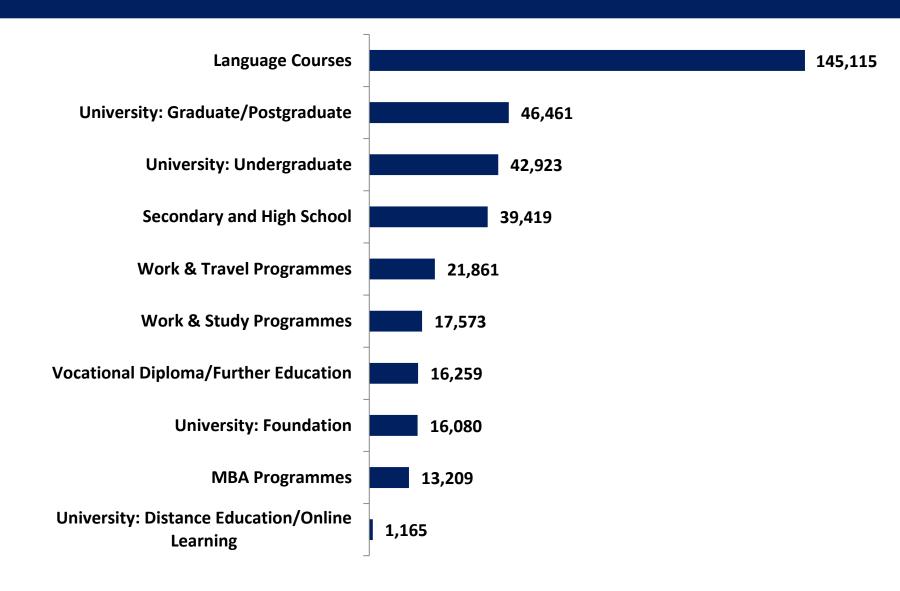




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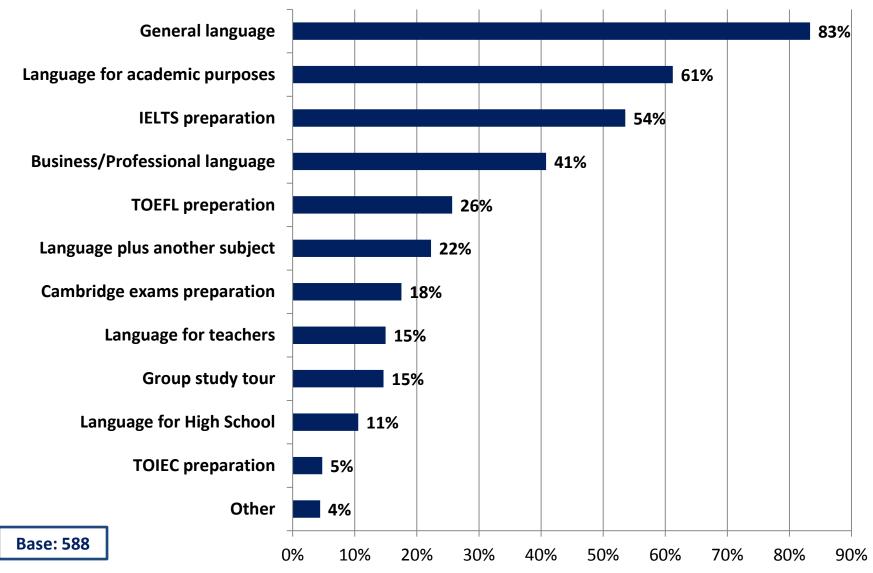






#### What kind of language courses do you place students in?





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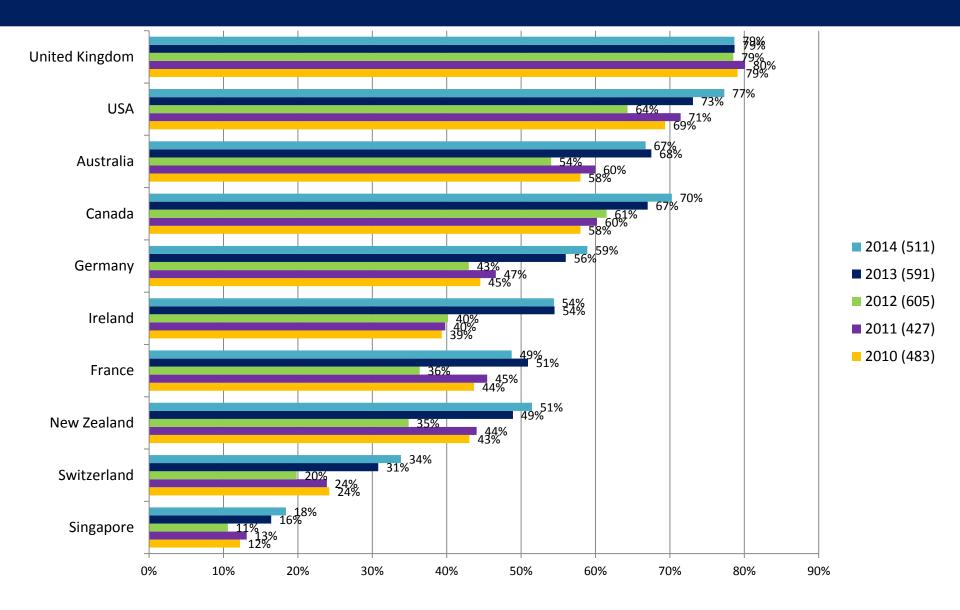


	Number of placements								
	2014	2013	2012	2011	2010				
Total	360,065	328,877	237,734	210,615	239,915				
Schools	<b>1</b> 39,419	26,523	12,500	11,056	17,554				
Vocational Education	<b>1</b> 6,259	15,978	15,646	12,346	14,782				
Foundation	<b>16,080</b>	11,189	12,489	7,084	8,627				
Undergraduate	<b>1</b> 42,923	31,575	33,347	20,073	27,643				
Graduate/Postgraduate	<b>1</b> 46,461	35,879	31,895	19,005	25,228				
MBA Programmes	<b>↓</b> <i>13,209</i>	21,835	8,031	5,721	8,757				
Work & Travel	<b>1</b> 21,861	1,006	19,296	24,354	25,688				
Language Courses	<b>↓</b> 145,115	161,402	104,530	No data	No data				
Distance education/Online learning	<b>↓</b> 1,165	12,780	No data	No data	No data				
Work & Study Programmes	17,573	10,710	No data	No data	No data				

# 

#### In which countries do you place students for Language courses?



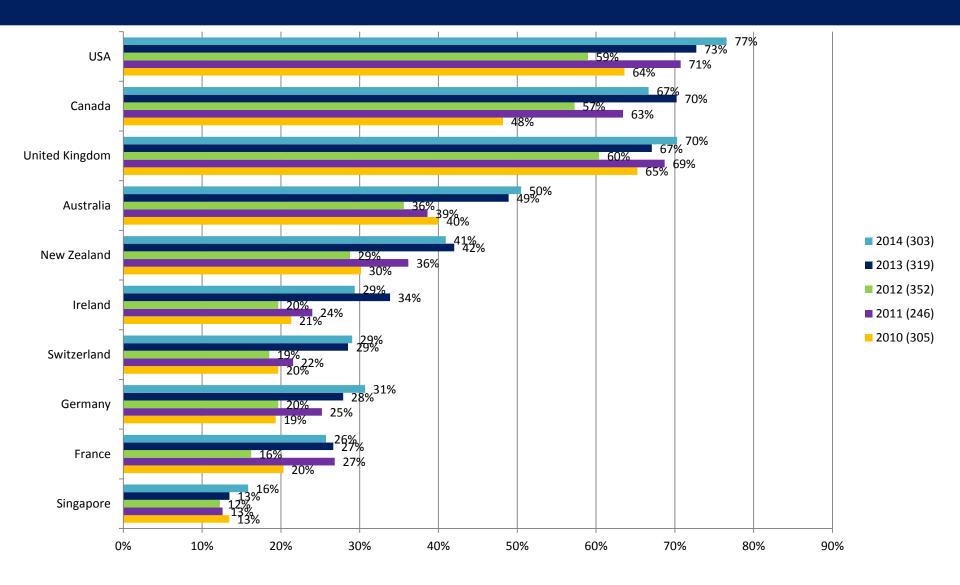




#### In which countries do you place students for <u>Secondary and High School</u>?

*L-graduate* INTERNATIONAL INSIGHT

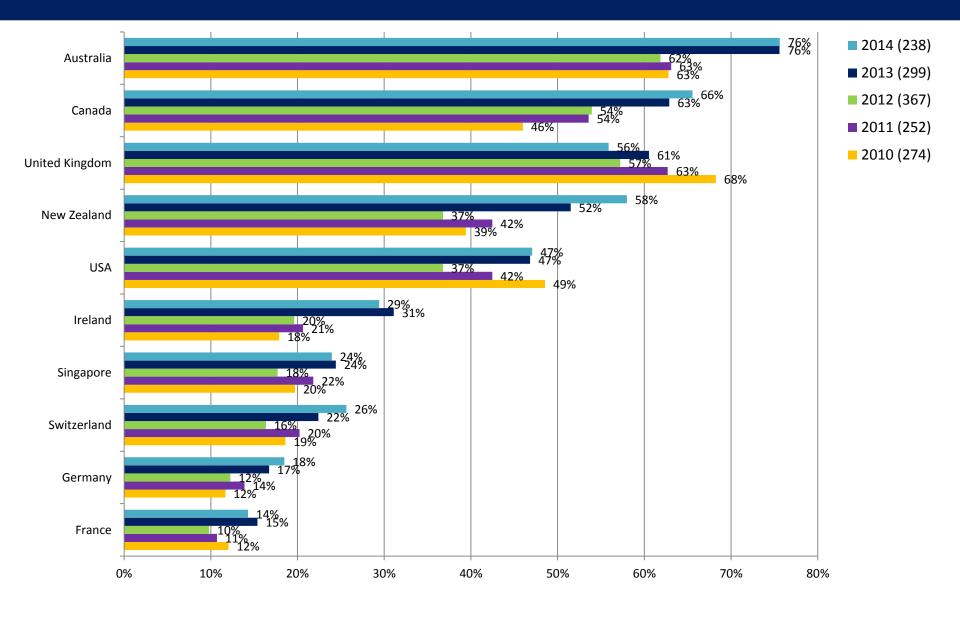






#### In which countries do you place students for <u>Vocational Diploma/Further Education</u>?

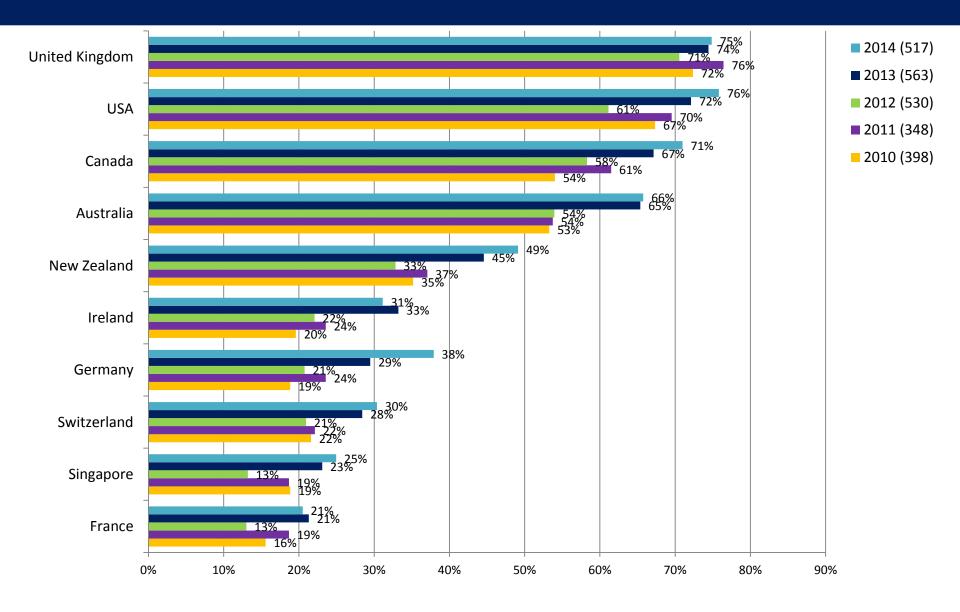






#### In which countries do you place students for <u>University: Undergraduate</u>?

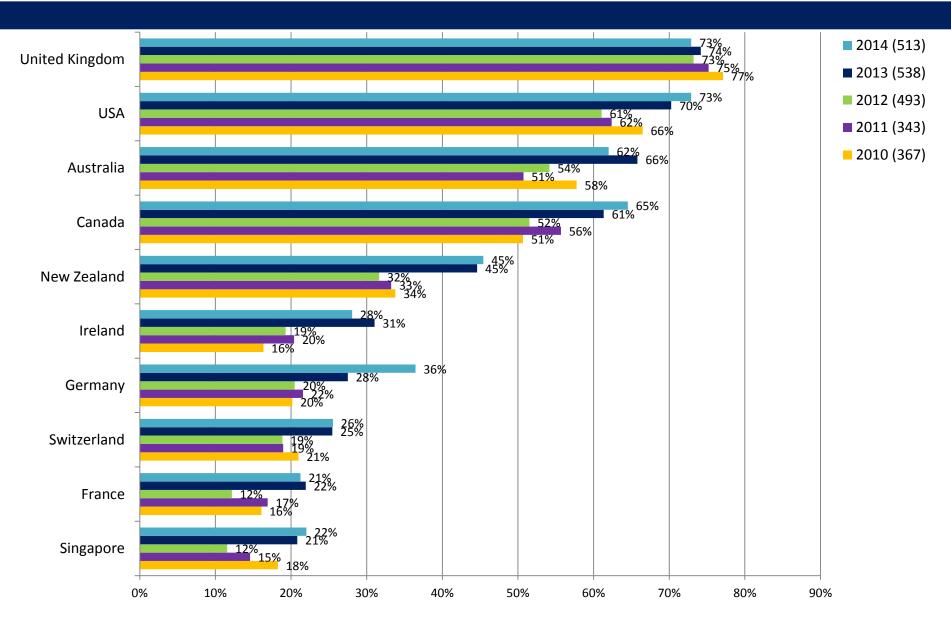






#### In which countries do you place students for <u>University: Graduate/Postgraduate</u>?









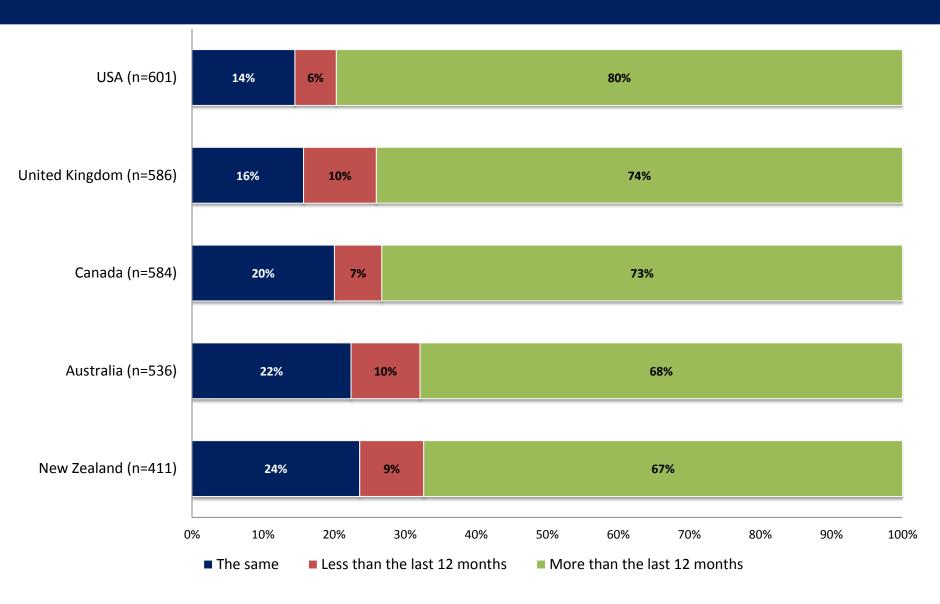
# How many students do agents expect to place in the <u>next 12 months</u>?





#### <u>Approximately how many students do you expect to place</u> overall in the next 12 month? TRADITIONAL MARKETS

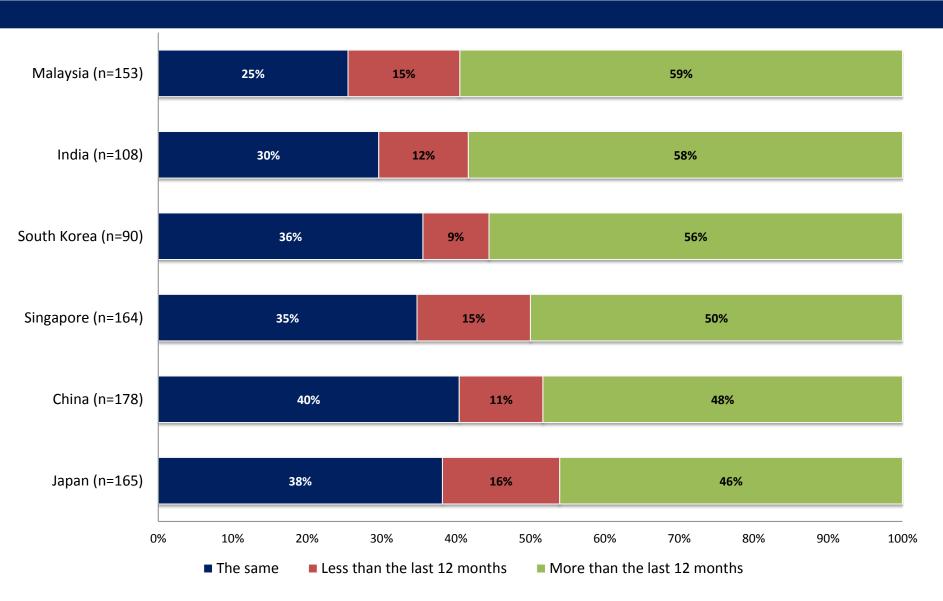






#### <u>Approximately how many students do you expect to place</u> <u>overall in the next 12 month? EMERGING MARKETS</u>





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#### <u>Approximately how many students do you expect to place</u> overall in the next 12 month?



USA (n=601) 14% 6% 80% United Kingdom (n=586) 16% 10% 74% Canada (n=584) 20% 73% Australia (n=536) 22% 68% 10% New Zealand (n=411) 24% 67% 9% Ireland (n=358) 29% 9% 62% Germany (n=407) 33% 60% 7% Malaysia (n=153) 59% 25% 15% India (n=108) 30% 12% 58% South Korea (n=90) 36% 56% 9% UAE (n=92) 38% 9% 53% Switzerland (n=265) 38% 9% 52% Spain (n=253) 43% 51% 6% Singapore (n=164) 35% 15% 50% China (n=178) 40% 11% 48% France (n=315) 48% 43% 9% Thailand (n=59) 31% 47% 22% Japan (n=165) 38% 16% 46% Italy (n=248) 44% 12% 44% Russia (n=139) 38% 19% 43% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

The same

Less than the last 12 months
More than the last 12 months

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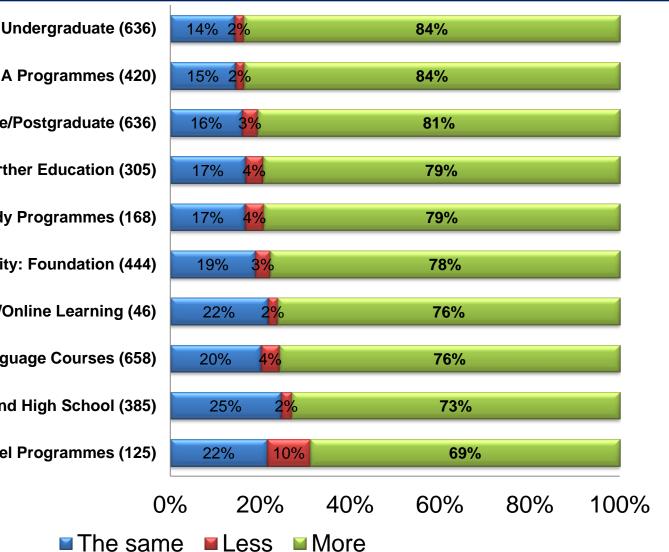
100%



## In the next coming 12 months do you expect to send

#### *more/less/the same?*





University: Undergraduate (636)

**MBA Programmes (420)** 

University: Graduate/Postgraduate (636)

Vocational Diploma/Further Education (305)

Work & Study Programmes (168)

**University: Foundation (444)** 

University: Distance Education/Online Learning (46)

Language Courses (658)

Secondary and High School (385)

Work & Travel Programmes (125)



## Which country is best...? By type of study

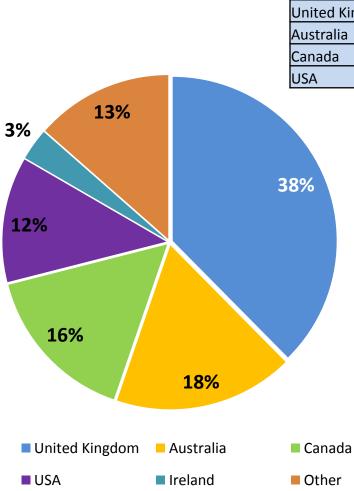








	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
Jnited Kingdom	38%	1	1	1	1	1	1
Australia	18%	2	2	2	2	3	2
Canada	16%	3	3	3	4	4	4
JSA	12%	4	4	4	3	2	3

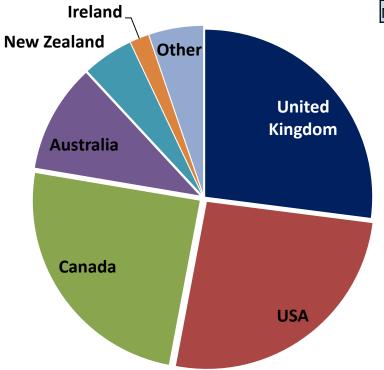




#### Which study destinations is best for Secondary and high schools?



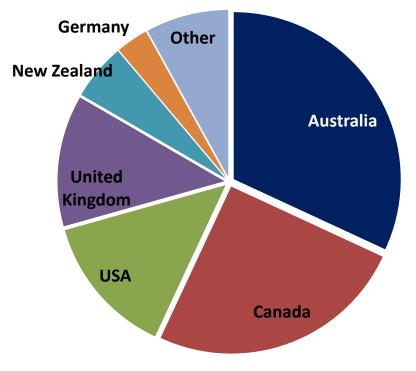
	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
United Kingdom	27%	1	1	1	1	1	1
USA	26%	2	2	2	2	2	2
Canada	25%	3	3	3	3	3	3
Australia	10%	4	4	4	4	4	4
New Zealand	5%	5	5	5	5	5	5







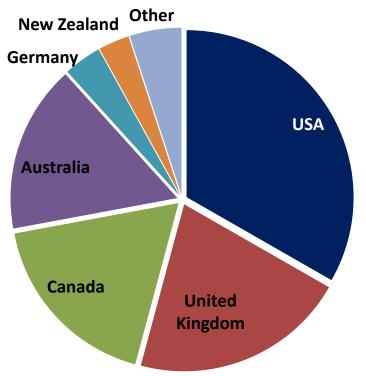
	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
Australia	32%	1	1	1	1	1	2
Canada	25%	2	2	3	3	4	4
United Kingdom	13%	4	3	2	2	2	1
USA	14%	3	4	4	4	3	3
New Zealand	5%	5	5	5	5	5	5





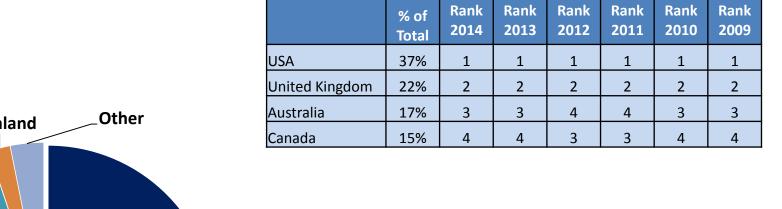


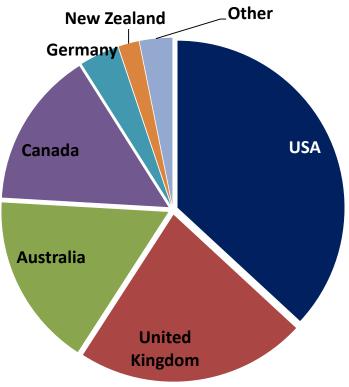
	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
USA	33%	1	1	1	1	1	1
United Kingdom	21%	2	2	2	2	2	2
Australia	16%	4	3	4	3	4	3
Canada	18%	3	4	3	4	3	4













## **Overall attractiveness of study destinations**





## **Overall attractiveness of Study Destinations in 2014**



USA (n=671) 93.4% Canada (n=677) 93.4% United Kingdom (n=666) 92.5% Australia (n=649) 92.1% Germany (n=565) 87.1% New Zealand (n=585) 86.0% Switzerland (n=497) 80.3% France (n=526) 79.8% Ireland (n=533) 79.2% Spain (n=475) 73.9% Italy (n=469) 70.8% Singapore (n=432) 57.9% China (n=417) 57.6% Japan (n=422) 57.3% Malaysia (n=426) 46.9% UAE (n=368) 39.1% Russia (n=408) 36.8% South Korea (n=379) 35.4% India (n=430) 30.7% Thailand (n=362) 23.5% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0% 80.0% 90.0% 100.0%

Note: Excludes respondents that indicated they 'Do not know'

Traditional markets remain top of 'attractive' list



#### Trends in overall attractiveness: Traditional markets



USA '14 USA '13				77%				17%	10	5%
				73%				20%		<u> </u>
USA '12				73%				20%		<b>5%</b>
USA '11				72%				23%		1% 3%
USA '10				)%				22%		6%
USA '09				73%				17%		7%
USA '08			68%					25%		<b>6</b> 4%
UK '14			64%					29%	-3%	4%
UK '13			63%					28%	4%	5%
UK '12			64%					29%	3	<mark>% 4</mark> %
UK '11			63%					27%	<b>5%</b>	5%
UK '10			69	%				24%	2%	5%
UK '09				72%				21%	1%	6%
UK '08			7:	1%				23%	<mark>2%</mark>	5%
Canada '14			66%					27%	39	<mark>% 4</mark> %
Canada '13			64%				39	<b>4%</b>		
Canada '12			64%			28% 3%				
Canada '11			59%			34% 3%				
Canada '10			52%							
Canada '09		48%					6% 5%			
Canada '08		49%	6				42%		7%	3%
Australia '14			58%				34	%	<mark>-3%</mark>	5%
Australia '13			53%				37%	• •	<b>5%</b>	5%
Australia '12		48%					43%		6%	3%
Australia '11		47%					41%		9%	4%
Australia '10		40%				46%			10%	5%
Australia '09		42%				44%			10%	5%
Australia '08		499	6				42%		<mark>5%</mark>	4%
New Zealand '14		35%				51%			11%	3%
New Zealand '13	33	8%				54%			10%	4%
New Zealand '12	329					54%			10%	4%
New Zealand '11		37%				46%			13%	4%
New Zealand '10		3%				52%			10%	5%
New Zealand '09	28%				53	8%			13%	5%
New Zealand '08	29%					57%			10%	5%
0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

Very attractive Very attractive

Attractive Attractive





		400/										
Thailand '14	5%	19%				52%				24%		
Thailand '13	5%	18%		51% 48%						25%		
Thailand'12	2%	23%					26%					
Thailand '11	3%	19%				50%				28%		
Thailand '10	3%	23%				46%				27%		
Thailand '09	3%	21%				50%				26%		
Thailand '08	6%	17%				47%			30	)%		
Singapore '14	11%				·0/			31%		12	0/	
Singapore 13	11%			47	70 <b>17%</b>			28%		12		
Singapore 13	12%			42%	4/%			31%		13%		
	8%											
Singapore '11				46%				27% 29%	_	19%		
Singapore '10	9% 10%			46% 38%			220			16%		
Singapore '09	10%				.0/		33% 19%					
Singapore '08	12%			45	)%			26%		17%		
Malaysia '14	9%			38%			2-	7%	_	16%		
Malaysia '13	9%			38%					16%			
Malaysia 13	9% 11%			38% 35%								
Malaysia 12	9%			35% 35%			35% 19% 35% 21%					
	9% 9%			35% 35%						21% 18%		
Malaysia '10 Malaysia '09	9% 10%		26%	35%			39%					
Malaysia '08	10%		26%	34%			45% 35%			19%		
ivialaysia uo	10%			34%			33%			22%		
Japan '14	12%			45	5%			21	5%		7%	
Japan 13	13%				5%			34			9%	
Japan '12	12%			459				35%			9%	
Japan '11	11%				51%			00/1	30%		8%	
Japan '10	12%				46%			325			0%	
Japan '09	159	6			51%				27%		7%	
						/		/				
C	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	
			Ve	ery attractive	Attractive	Unattractive	Very unat	tractive				





	Afr	ica	A	sia	Eur	ope	Latin America and the Caribbean	
Study Destination	Average	Base	Average	Base	Average	Base	Average	Base
USA	3.66	50	3.58	311	3.73	186	3.66	94
Canada	3.63	51	3.47	309	3.58	191	3.71	92
United Kingdom	3.40	50	3.38	303	3.77	193	3.53	92
Australia	3.37	41	3.41	316	3.44	174	3.64	85
Germany	3.26	43	3.09	244	3.24	172	3.14	79
New Zealand	2.97	37	3.22	281	2.97	158	3.45	82
Ireland	3.05	38	2.81	226	3.13	169	3.28	79
Switzerland	3.00	34	2.90	222	3.20	153	2.99	68
France	2.85	39	2.79	215	3.03	168	3.13	82
Spain	2.71	31	2.59	191	3.09	163	3.11	72
Italy	2.68	31	2.65	191	2.95	153	3.03	75
China	2.68	31	2.65	176	2.64	129	2.41	61
Japan	2.56	27	2.69	200	2.56	114	2.53	62
Singapore	2.38	29	2.80	228	2.37	101	2.13	56
Malaysia	2.95	39	2.64	214	1.99	102	1.93	54
UAE	2.84	37	2.22	165	2.25	101	2.18	49
Russia	2.35	34	2.34	180	2.21	119	1.93	59

Table shows the mean scores calculated from a 4 point scale (4=very attractive, 1= very unattractive)





	E	U	non	-EU
Study Destination	Average	Base	Average	Base
USA	3.67	101	3.65	569
United Kingdom	3.71	108	3.48	557
Canada	3.50	104	3.56	572
Australia	3.57	101	3.43	547
New Zealand	3.13	91	3.19	493
Germany	2.97	88	3.18	477
Ireland	3.12	94	2.97	438
France	2.99	88	2.89	438
Switzerland	2.82	72	3.04	424
Spain	3.05	85	2.78	389
Italy	2.90	78	2.77	391
Japan	2.68	66	2.61	356
China	2.57	67	2.60	350
Singapore	2.26	54	2.62	377
Malaysia	2.02	54	2.46	371
Russia	2.27	75	2.20	332
UAE	2.14	49	2.30	318
South Korea	2.07	55	2.24	323
Thailand	2.17	53	2.01	308
India	1.96	67	2.09	363

Table shows the mean scores calculated from a 4 point scale (4=very attractive, 1= very unattractive)



**Indian Agents** 



Very unattractive Unattractive ■ Attractive Very attractive Canada (60) **5% 0%** 10% 85% USA (58) 9% 2% 10% 79% New Zealand (59) 2% 3% 36% 59% 34% Australia (61) 8% 2% 56% Germany (48) 2% 4% 🖿 60% 33% United Kingdom (57) 44% 33% 4% 19% 69% Singapore (52) 2% 12% 17% Switzerland (41) 20% 61% 17% 2% India (32) 47% 3% 34% 16% China (26) 8% 42% 35% 15% 33% Russia (30) 10% 43% 13% Ireland (41) 0% 12% 17% 71% France (37) 19% 68% 3% 11% Malaysia (38) 11% 37% 42% 11% 9% 29% 54% 9% Italy (35) 7% Japan (28) 14% 46% 32% Thailand (31) 23% 58% 13% South Korea (26) 31% 50% 15% 39% 6% Spain (36) 53% 41% UAE (37) 11% 46% 80% 0% 10% 20% 30% 40% 50% 60% 70% 90% 100%





#### **Chinese Agents** Very unattractive Unattractive Attractive Very attractive 74% USA (53) 4% 📥 8% 🗖 15% United Kingdom (49) 0% 29% **59%** 12% 28% Canada (54) 56% 13% 4% Australia (52) 2% 38% 44% 15% China (19) 21% 26% 32% 21% 68% 20% New Zealand (44) 5% 🚺 7% Germany (36) 8% **6%** 📥 72% 14% 9% 9% 70% 12% Switzerland (33) France (37) 8% 8% 8% 76% 9% Singapore (35) 80% 6% 6% 4% 17% UAE (23) 43% 35% 4% Thailand (27) 26% 44% 26% 55% 3% Ireland (31) 10% 32% 9% 3% Italy (32) 16% 72% 3% Japan (33) 6% 24% 67% 0% India (27) 33% 44% 22% Malaysia (32) 16% 44% 41% Russia (28) 18% 50% 32% South Korea (33) 6% 45% 48% 33% 57% Spain (30) 10% 80% 0% 10% 20% 30% 40% 50% 60% 70% 90% 100%





#### **Russian Agents** Very attractive Very unattractive Unattractive ■ Attractive United Kingdom (47) 20% 6% 91% USA (46) 20% 17% 80% Canada (47) 0% 6% 🛁 19% 74% Switzerland (46) 2% 2% 43% **52%** Australia (43) **C 2%** 49% 49% 48% Germany (46) ( 2% 50% Ireland (46) 2% 17% 48% 33% Spain (44) 2% 5% 77% 16% New Zealand (38) 8% 13% 66% 13% 74% France (46) 0% 15% 11% 47% 11% Russia (19) 0% 42% Italy (43) 2% 14% 77% 7% China (35) 0% 57% 6% 37% 4% UAE (28) 43% 4% 50% 0% India (31) 32% 68% 0% Japan (28) 50% 46% 4% Malaysia (29) 21% 59% 21% 11% 22% South Korea (27) 67% 68% Singapore (31) 29% 3% 65% 12% Thailand (26) 23% 80% 0% 10% 20% 30% 40% 50% 60% 70% 90% 100%





#### Very unattractive Unattractive ■ Attractive Very attractive Canada (41) 2 0% \_\_\_\_ 12% 85% Australia (40) 3 0% 13% 85% USA (41) 2 0% 15% 83% New Zealand (40) 3 0% 30% 68% Ireland (38) 0% 34% 66% United Kingdom (41) 2 0% 59% 39% 26% Spain (34) 0% 15% 59% Switzerland (28) 0% 32% 46% 21% Italy (32) 0% 19% 19% 63% Germany (33) 0% 21% 61% 18% 65% 15% France (34) 0% 21% 20% 12% Singapore (25) 28% 40% Thailand (24) 46% 8% 8% 38% South Korea (25) 40% 48% 4% 8% Japan (27) 67% 22% 7% 4% UAE (21) 24% 5% 43% 29% Malaysia (23) 30% 57% 9% Russia (28) 36% 50% 11% India (29) 34% 48% 14% China (24) 21% 58% 21% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Brazilian Agents



**Nigerian Agents** 

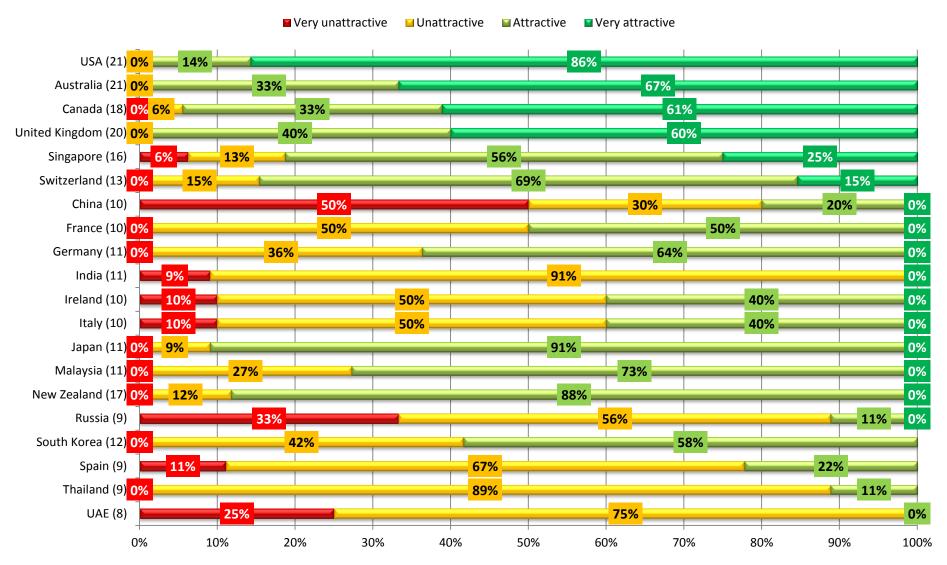


#### Unattractive Very unattractive Attractive Very attractive Canada (26) 8% 0% 92% USA (25) 8% 0% 12% 80% United Kingdom (27) 11% 🚾 0% 30% 59% Australia (21) 0% 19% 43% 38% Germany (21) 5% 10% 48% 38% UAE (22) 9% 27% 5% 59% New Zealand (19) 11% 32% 32% 26% Ireland (22) 5% 14% 59% 23% Malaysia (22) 14% 5% 59% 23% 48% France (21) 10% 24% 19% 69% Switzerland (16) 6% 🛃 6% 🗌 19% Russia (20) 15% 35% 25% 25% 21% 50% 14% Japan (14) 14% 7% China (15) 40% 40% 13% South Korea (15) 60% 7% 20% 13% Italy (16) 44% 31% 13% 13% Singapore (16) 13% 38% 38% Spain (16) 31% 44% 13% India (21) 19% 52% 19% Thailand (15) 27% 47% 20% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%





#### Vietnamese Agents







#### Very unattractive Unattractive ■ Attractive Very attractive Canada (27) <mark>45 05</mark> 4% 93% USA (26) 490% 8% 88% United Kingdom (25) <mark>49 0% -</mark> 8% 88% Germany (27) 4:0% 41% 56% Switzerland (24) 0% 46% 54% Ireland (19) 0% = 11% 47% 42% Australia (21) 0% 24% 14% 62% 14% 71% Italy (21) 0% 14% France (22) 0% 5% 🚹 82% 14% Spain (23) 0% 4% 83% 13% UAE (17) 29% 12% 6% 🖬 53% New Zealand (21) 0% 33% 57% 10% Singapore (13) 8% 38% 8% 46% China (20) 0% 5% 30% 65% India (17) 35% 53% 12% 0% 0% Japan (13) 8% 62% 31% Malaysia (14) 79% 7% 14% Russia (17) 71% 24% 6% 73% South Korea (15) **1** 7% 20% 69% Thailand (13) 31% 0% 70% 0% 10% 20% 30% 40% 50% 60% 80% 90% 100%

**Ukrainian Agents** 



# Student mobility concerns/difficulties in 2014

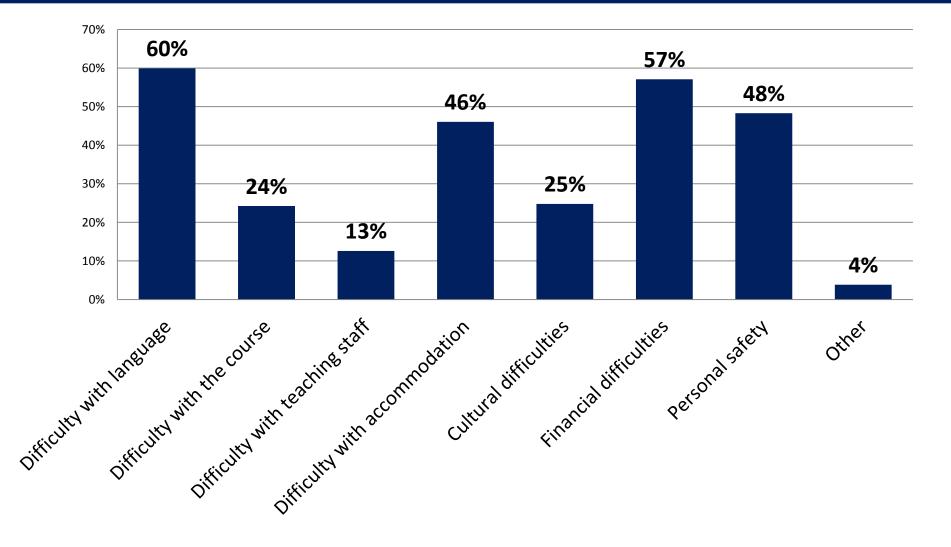






Main concerns **students and parents** have BEFORE departing for international study:

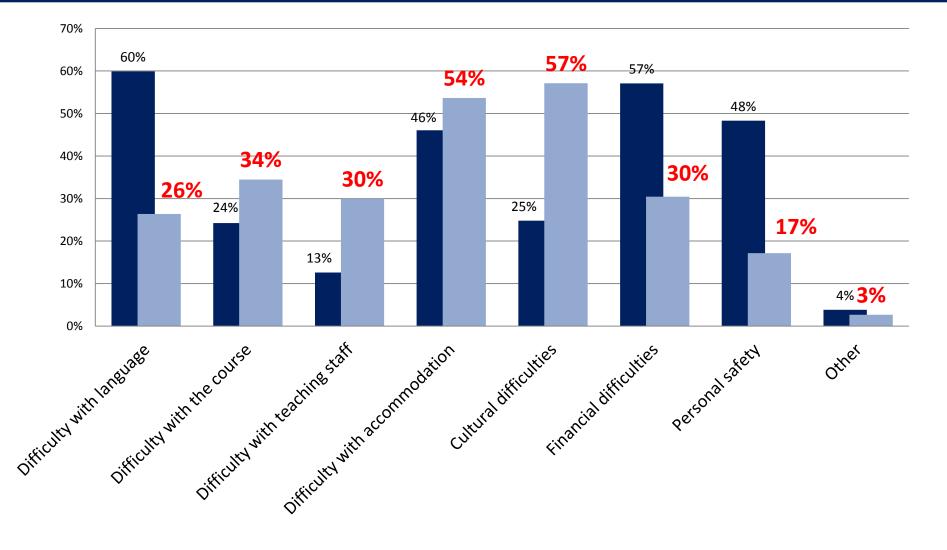






Main concerns **students and parents** have BEFORE AND AFTER departing for international study:



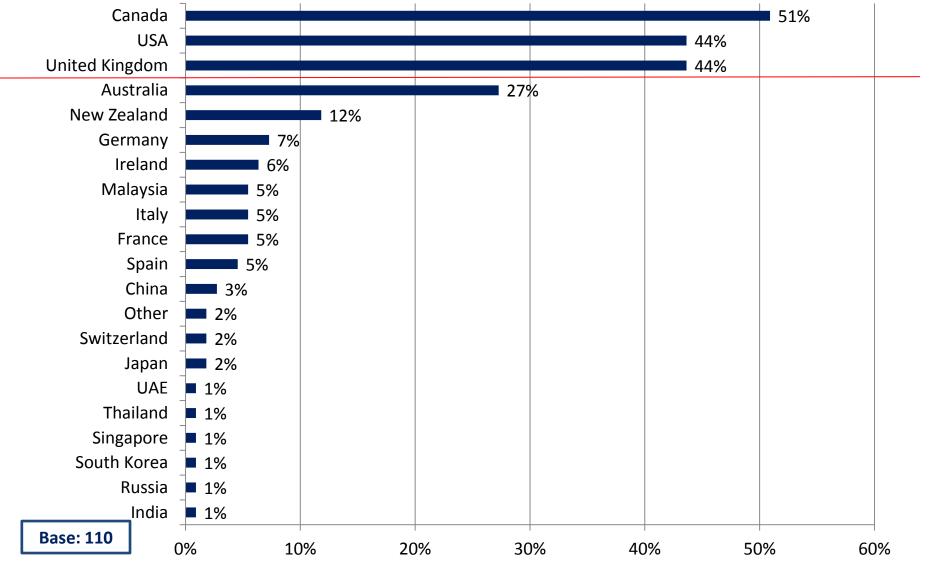




## <u>concerns/difficulties?</u>



#### Study Visa

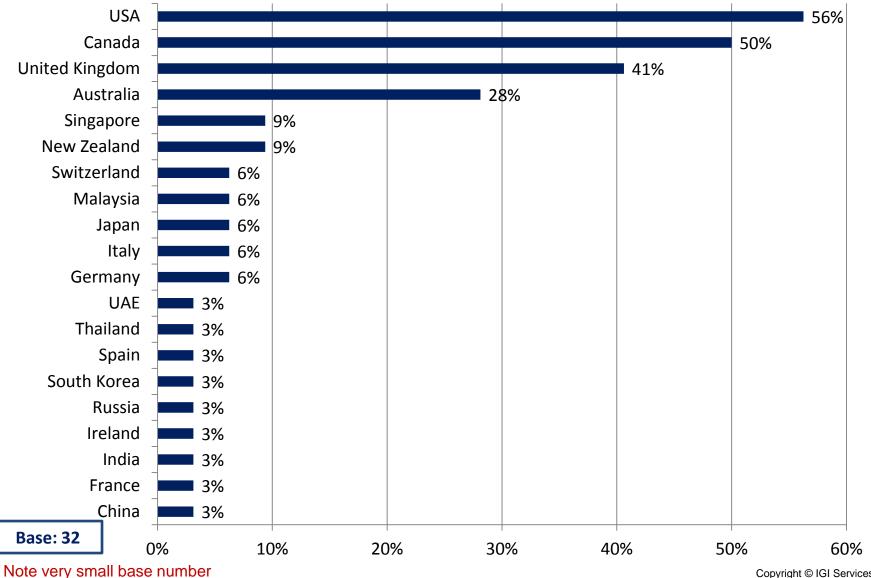




## concerns/difficulties?



#### Work Visa



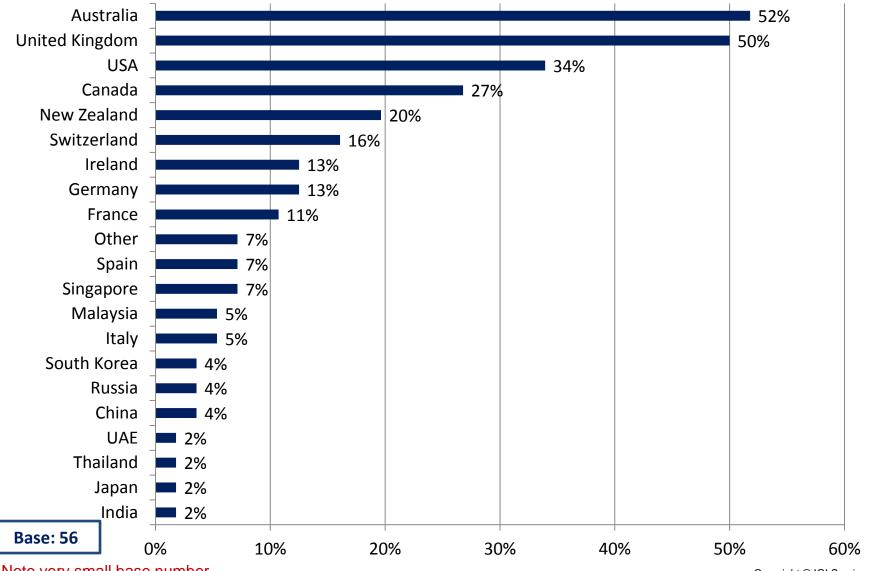
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## <u>concerns/difficulties?</u>



#### Financial



Note very small base number

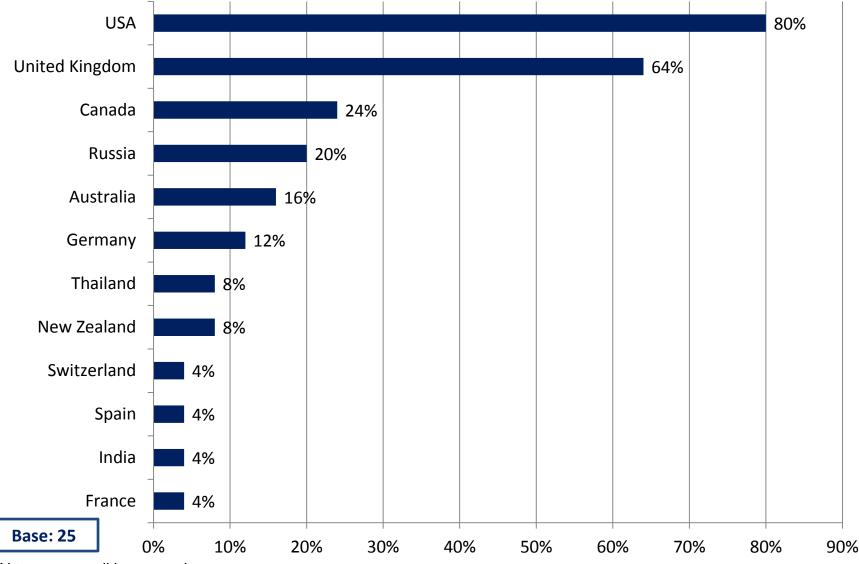
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## <u>concerns/difficulties?</u>

# Global Political Situation





Note very small base number

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# Marketing

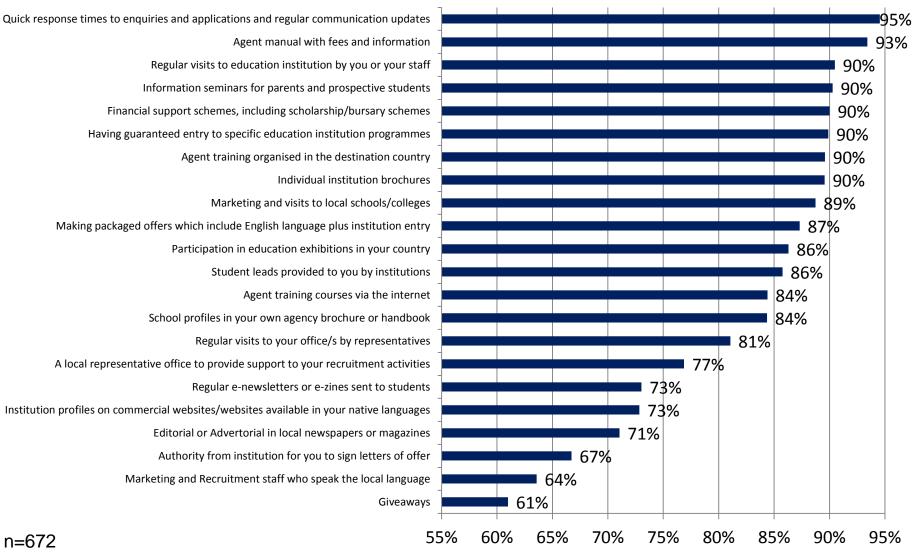




### Main ingredients in a successful school/agent partnership:



n=672

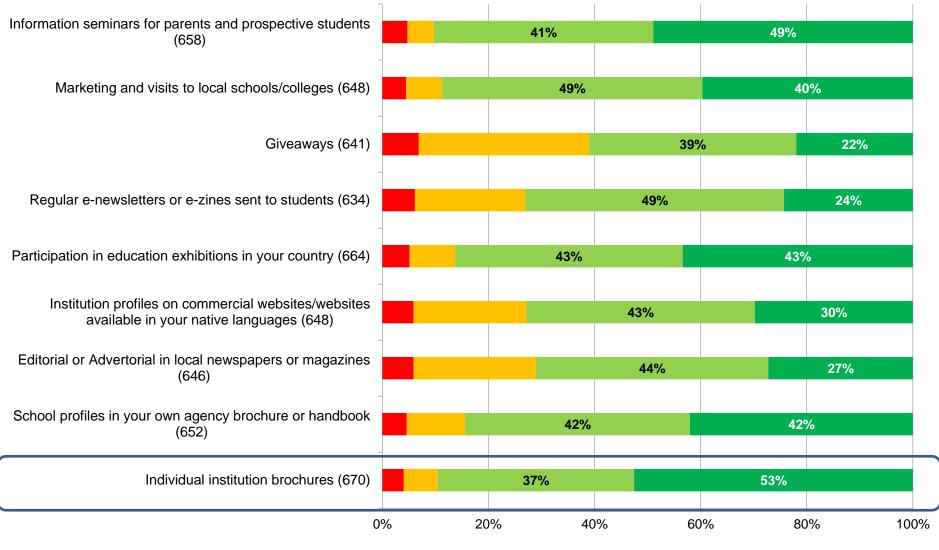


Agent manual with fees and information Regular visits to education institution by you or your staff Information seminars for parents and prospective students Financial support schemes, including scholarship/bursary schemes Having guaranteed entry to specific education institution programmes Agent training organised in the destination country Individual institution brochures Marketing and visits to local schools/colleges Making packaged offers which include English language plus institution entry Participation in education exhibitions in your country Student leads provided to you by institutions Agent training courses via the internet School profiles in your own agency brochure or handbook Regular visits to your office/s by representatives A local representative office to provide support to your recruitment activities Regular e-newsletters or e-zines sent to students Institution profiles on commercial websites/websites available in your native languages Editorial or Advertorial in local newspapers or magazines Authority from institution for you to sign letters of offer Marketing and Recruitment staff who speak the local language Giveaways





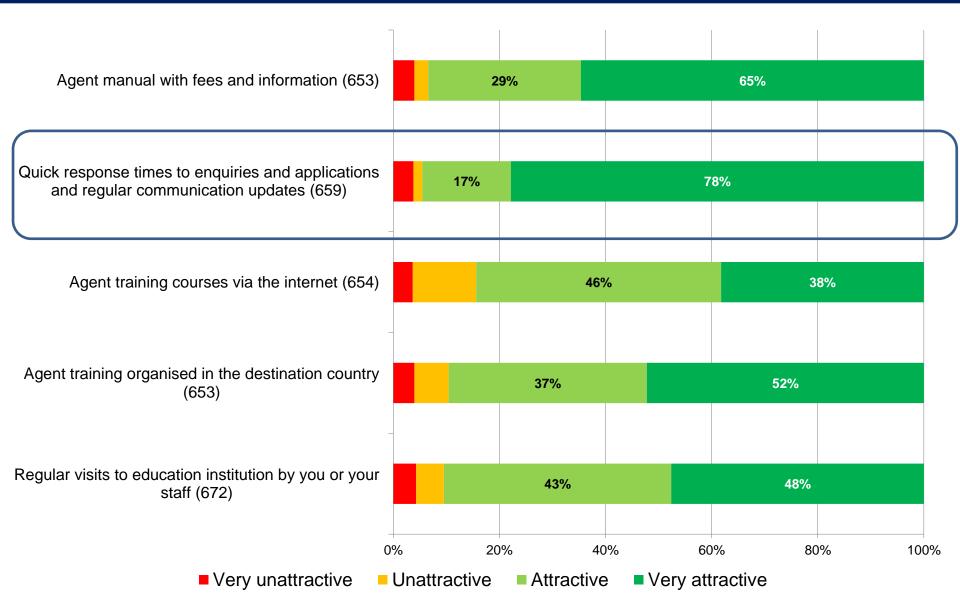
#### Promotional materials and campaigns







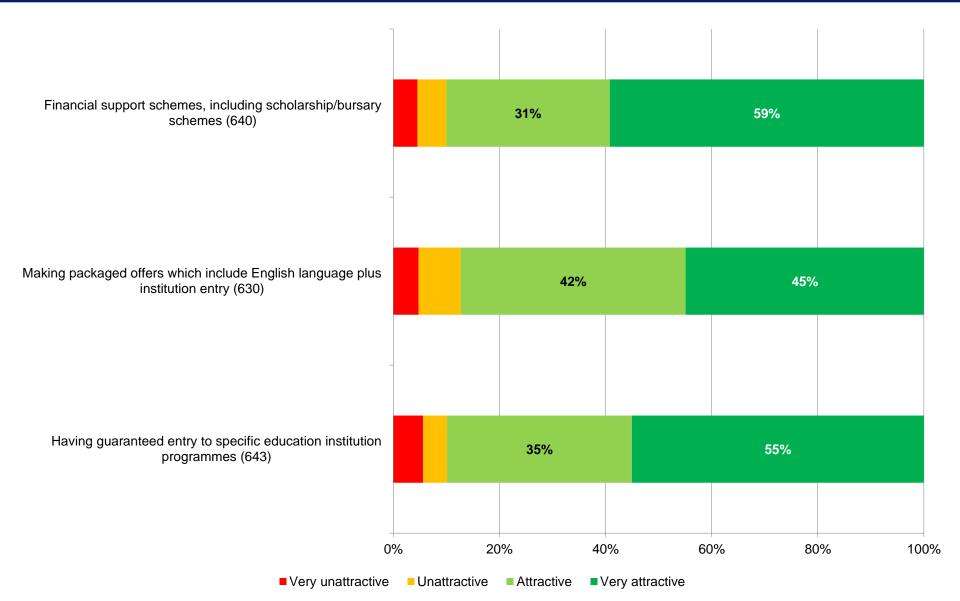
#### Services







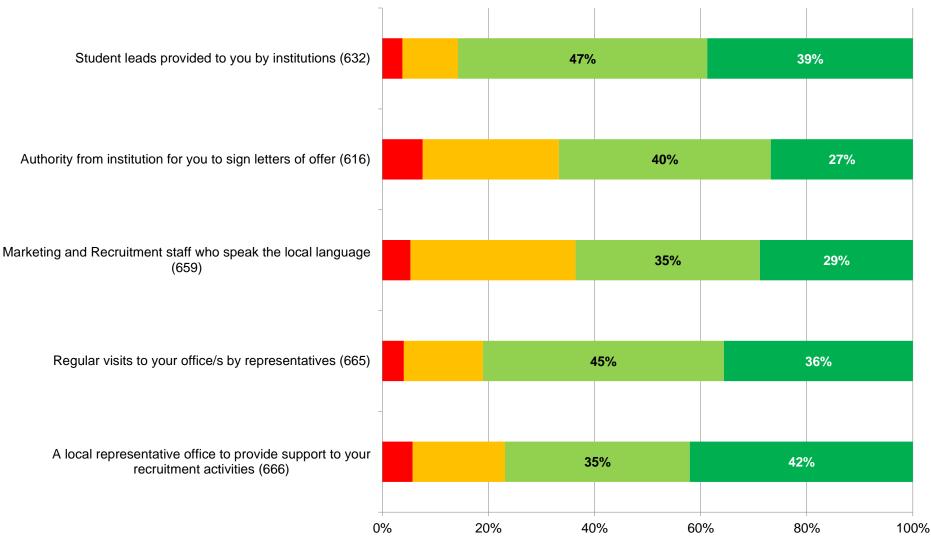
#### Packages and offers







#### **People and Staff**



Very unattractive Unattractive Attractive Very attractive

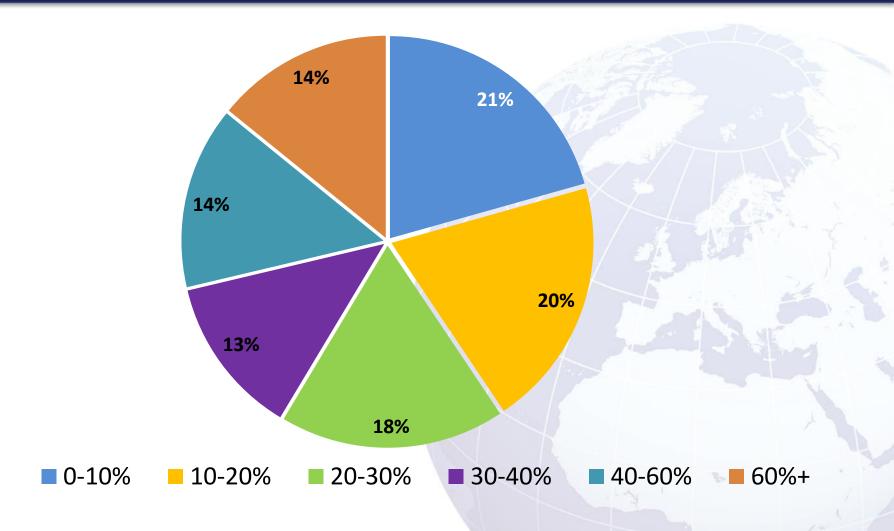


What percentage of your leads come from an online source (website, social media)?

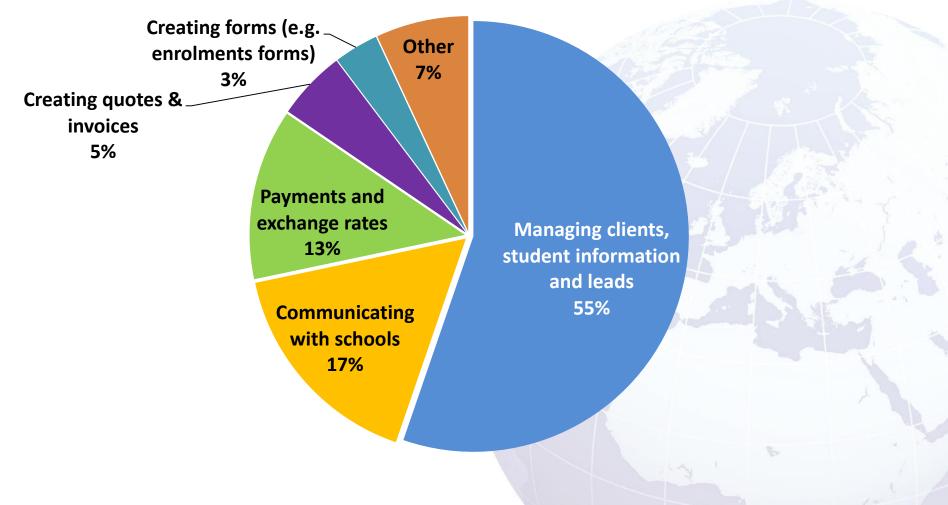


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### Thank you! Please leave your card for a copy of these slides

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