

The i-graduate ICEF Agent Barometer 2014

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ICEF Canada

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The i-graduate ICEF Agent Barometer



www.i-graduate.org

- *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 **8 years***
- *The 2014 study ran for 3 weeks during October*
- ***1,065 agents responded from 104 countries in this wave.***

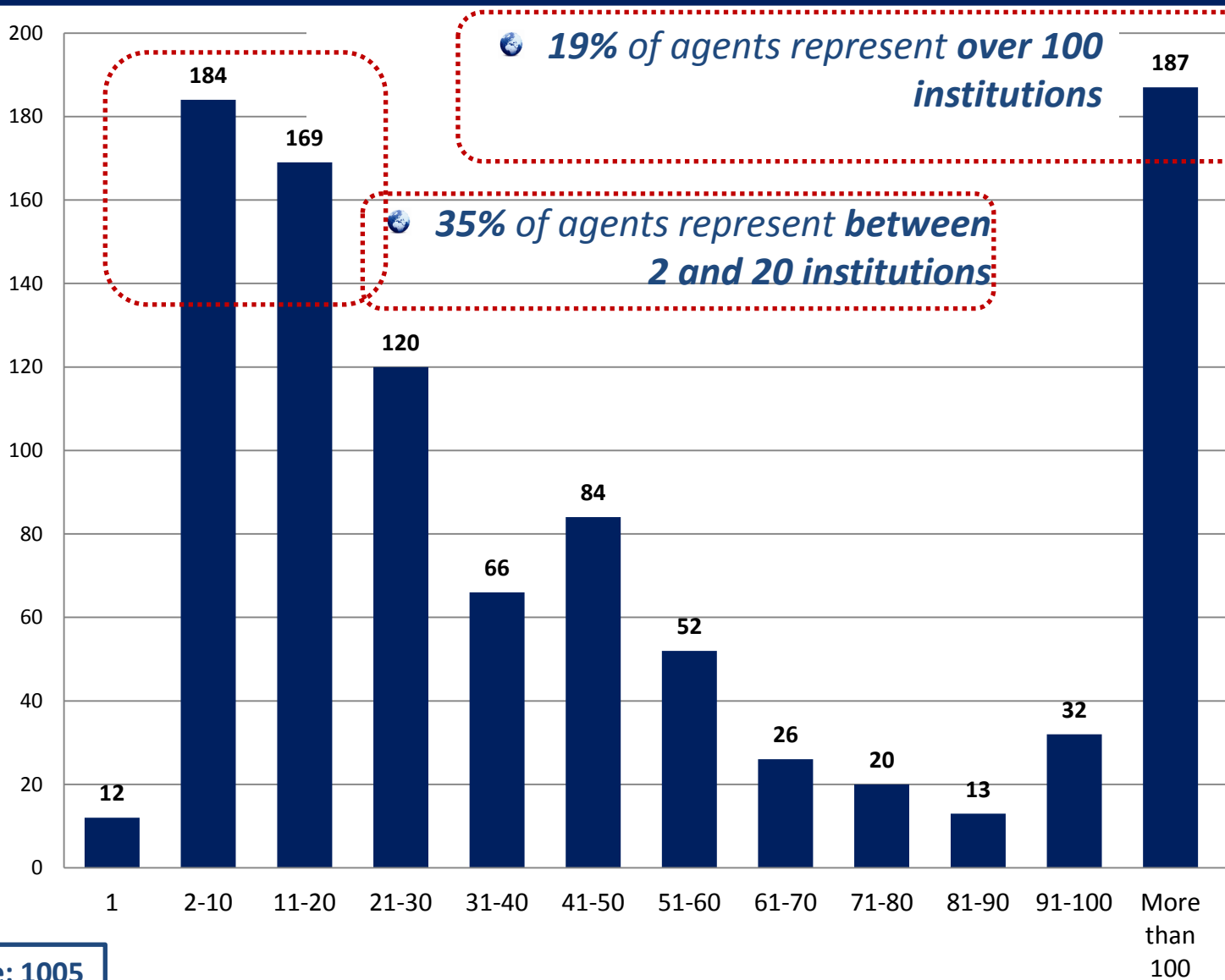
Agent Barometer 2014: *Profile of respondents*



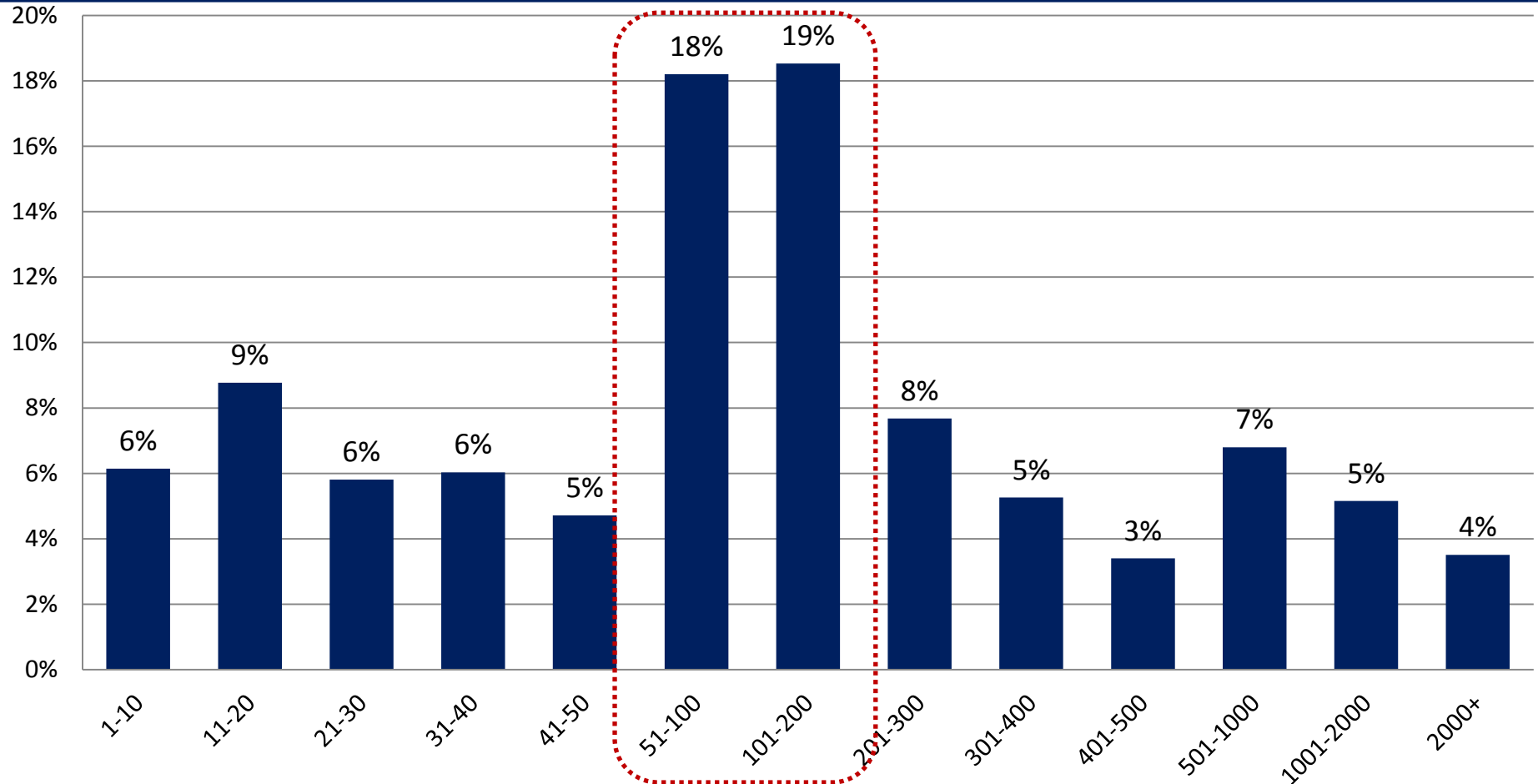
🌐 *104 nationalities represented in this years survey.*

India	87	Spain	26
China	84	Canada	23
Russia	69	Australia	21
Brazil	59	Italy	21
Nepal	51	Saudi Arabia	20
Nigeria	43	Colombia	20
Pakistan	40	Turkey	19
Vietnam	36	Mexico	16
Ukraine	35	Iran	15
UK	29	Germany	15

Approximately how many institutions does your company represent?



Base: 1005

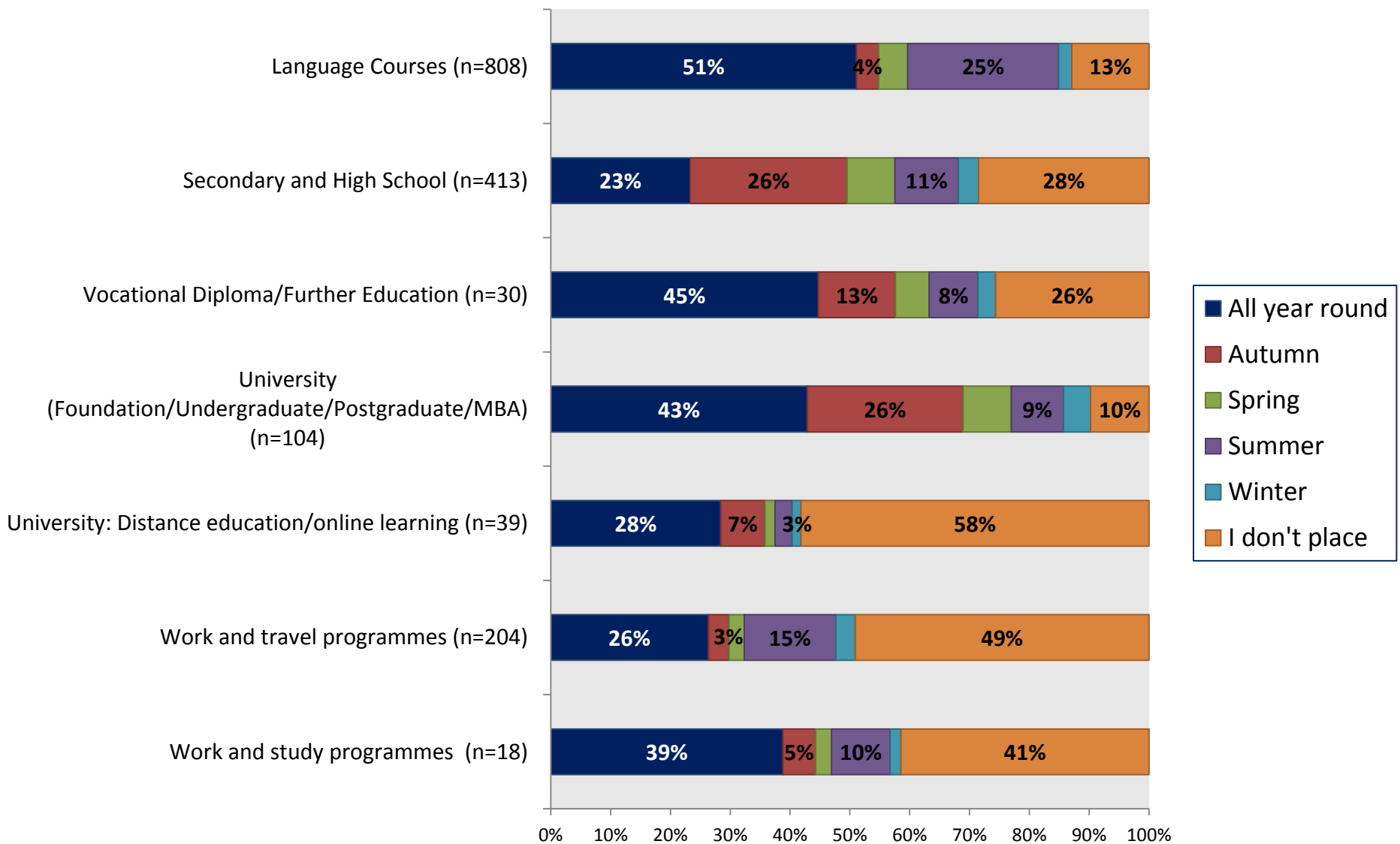


The greatest proportion of agents are placing between **51 and 200 students** annually.

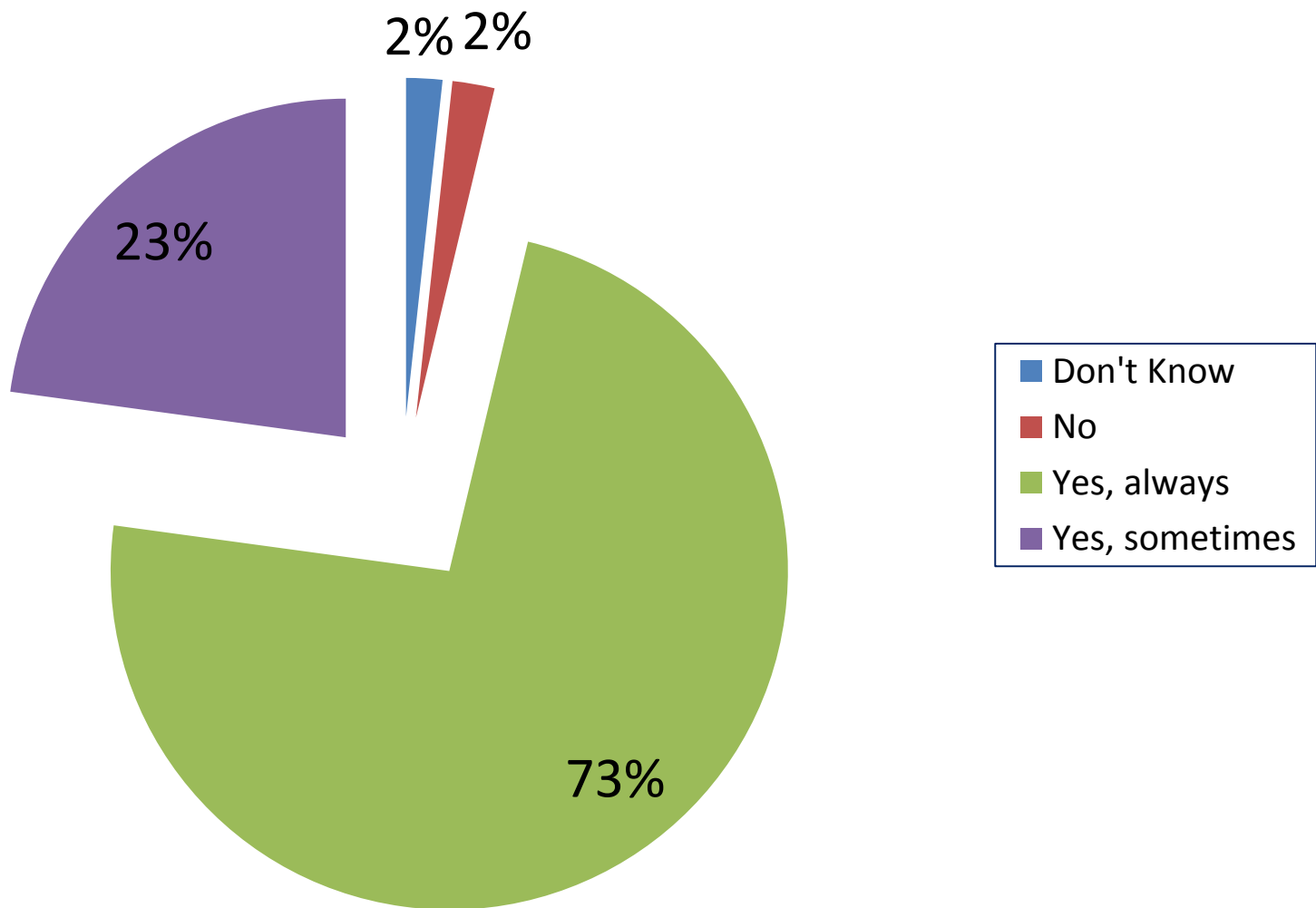
N.B. The agents that either indicated no placements or who skipped this question have not been included in the above chart

Base: 912

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?

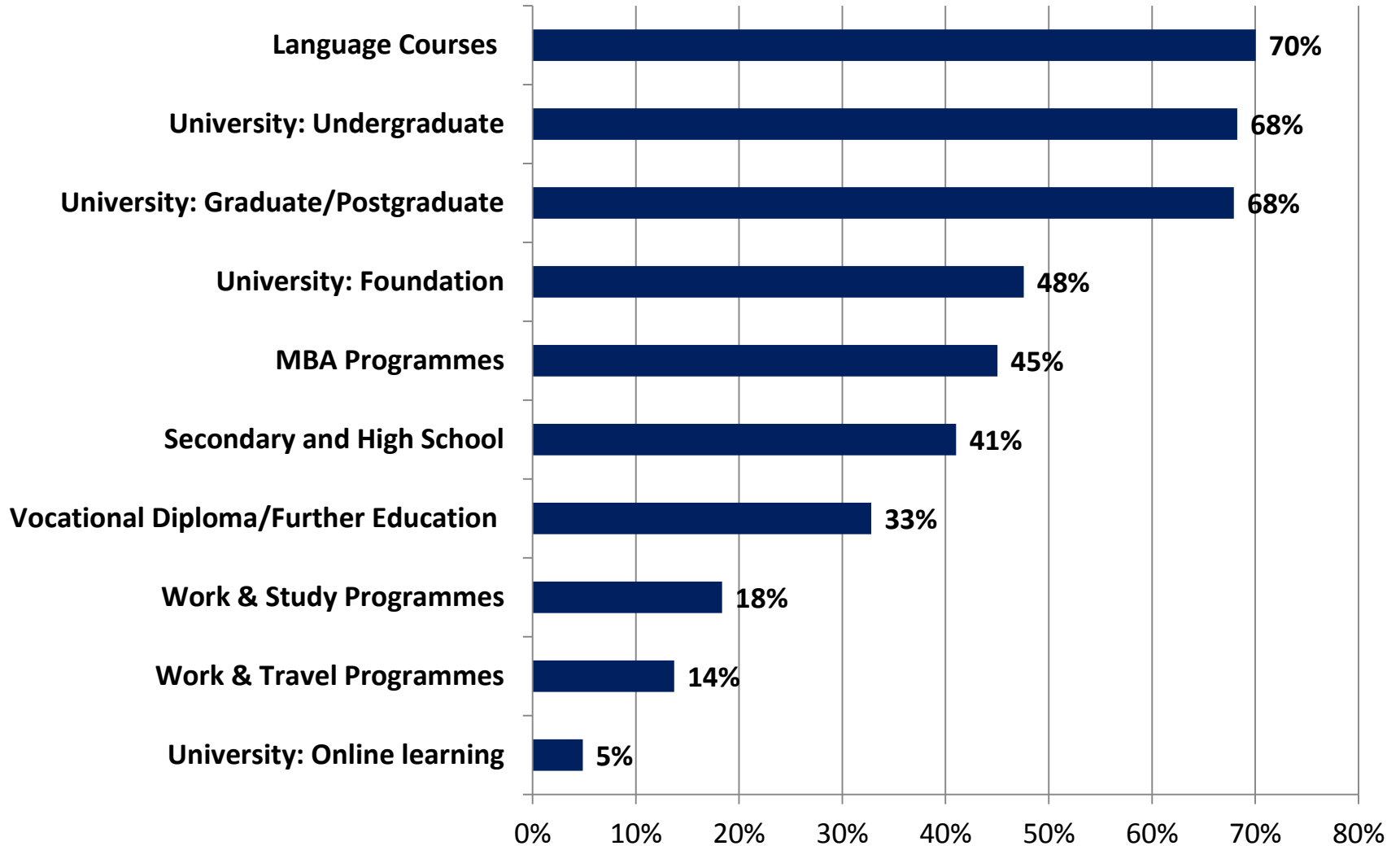


Base: 696

Scope of activity

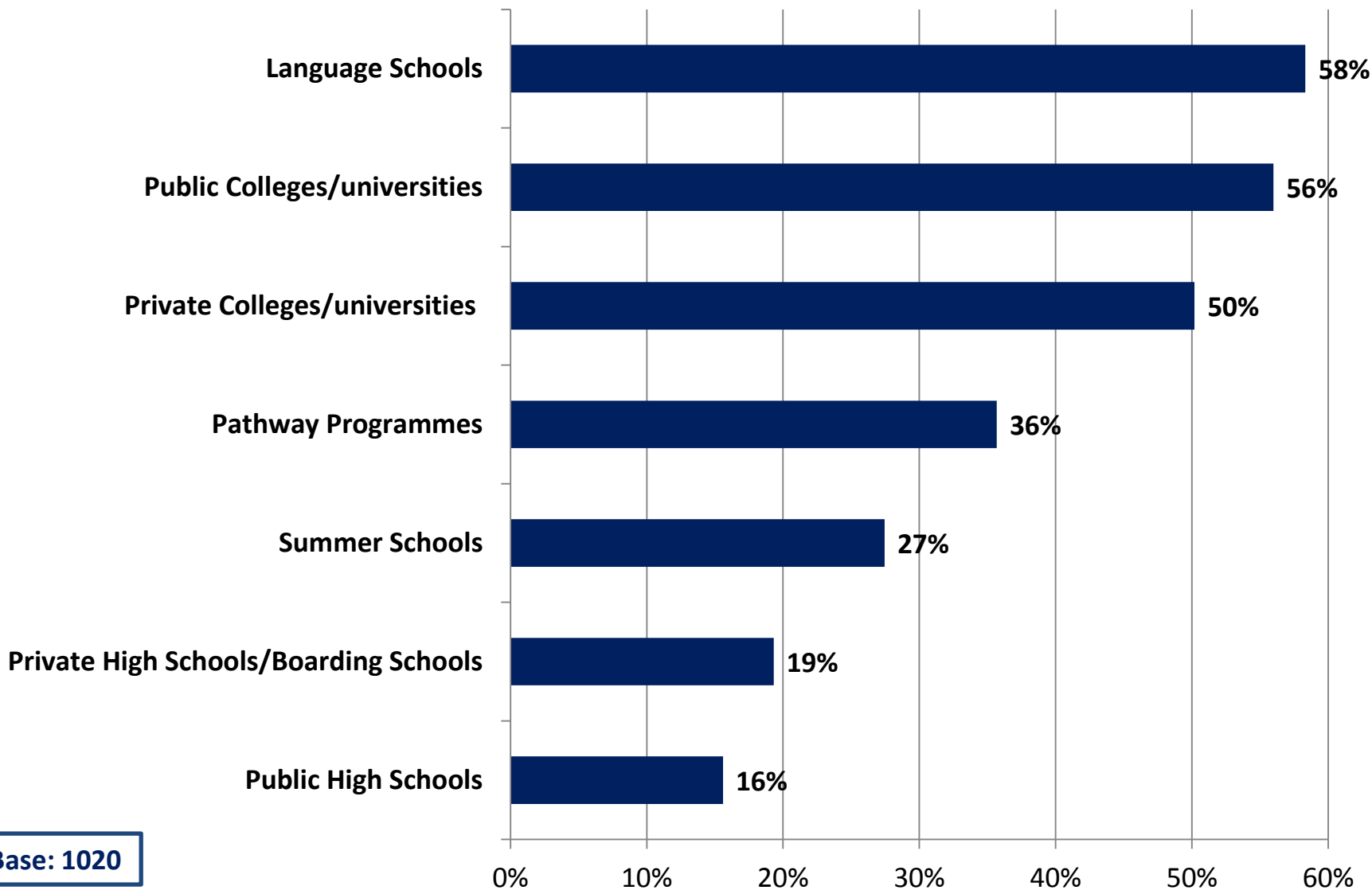


For which types of study do you recruit students?



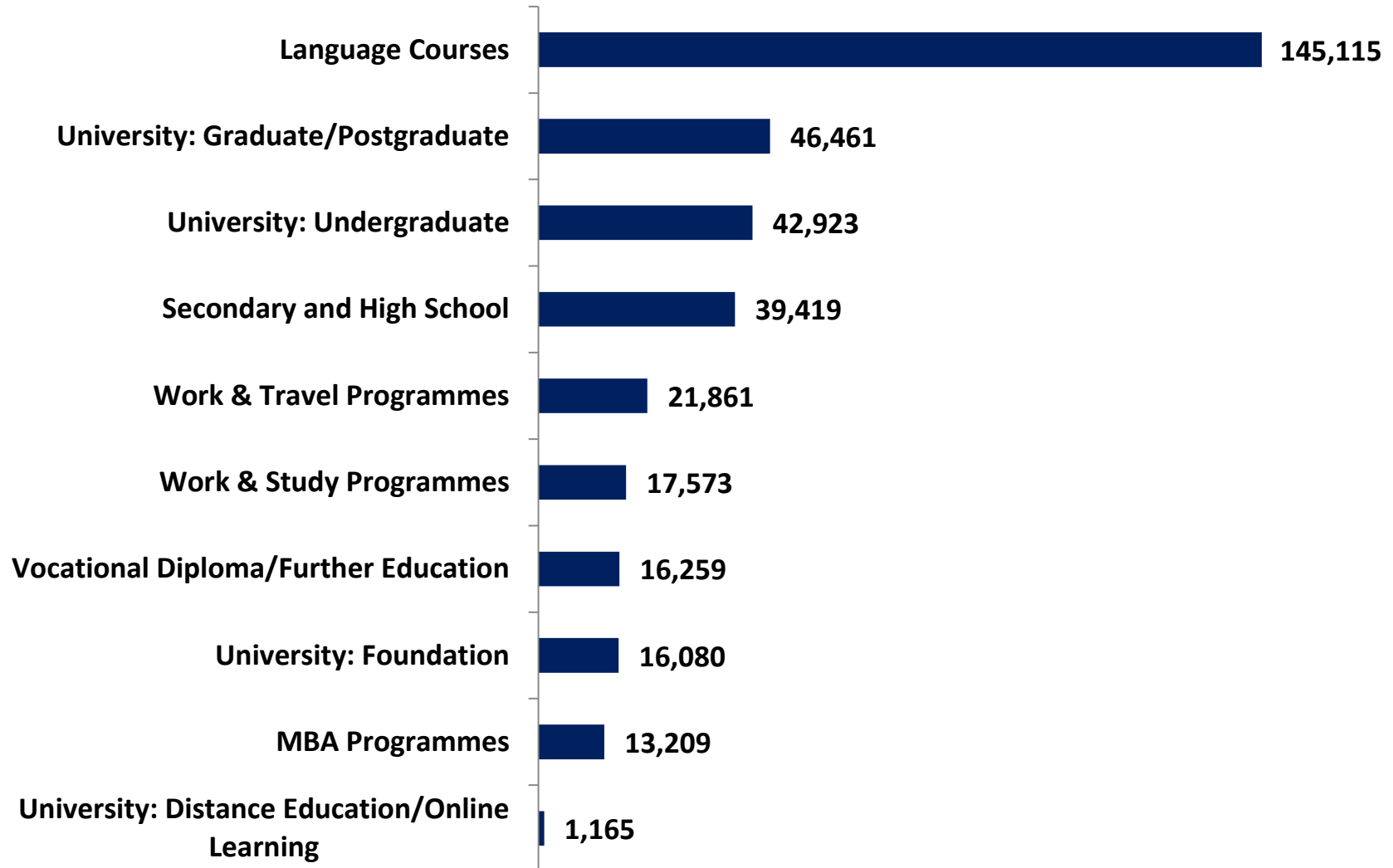
Base: 948

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

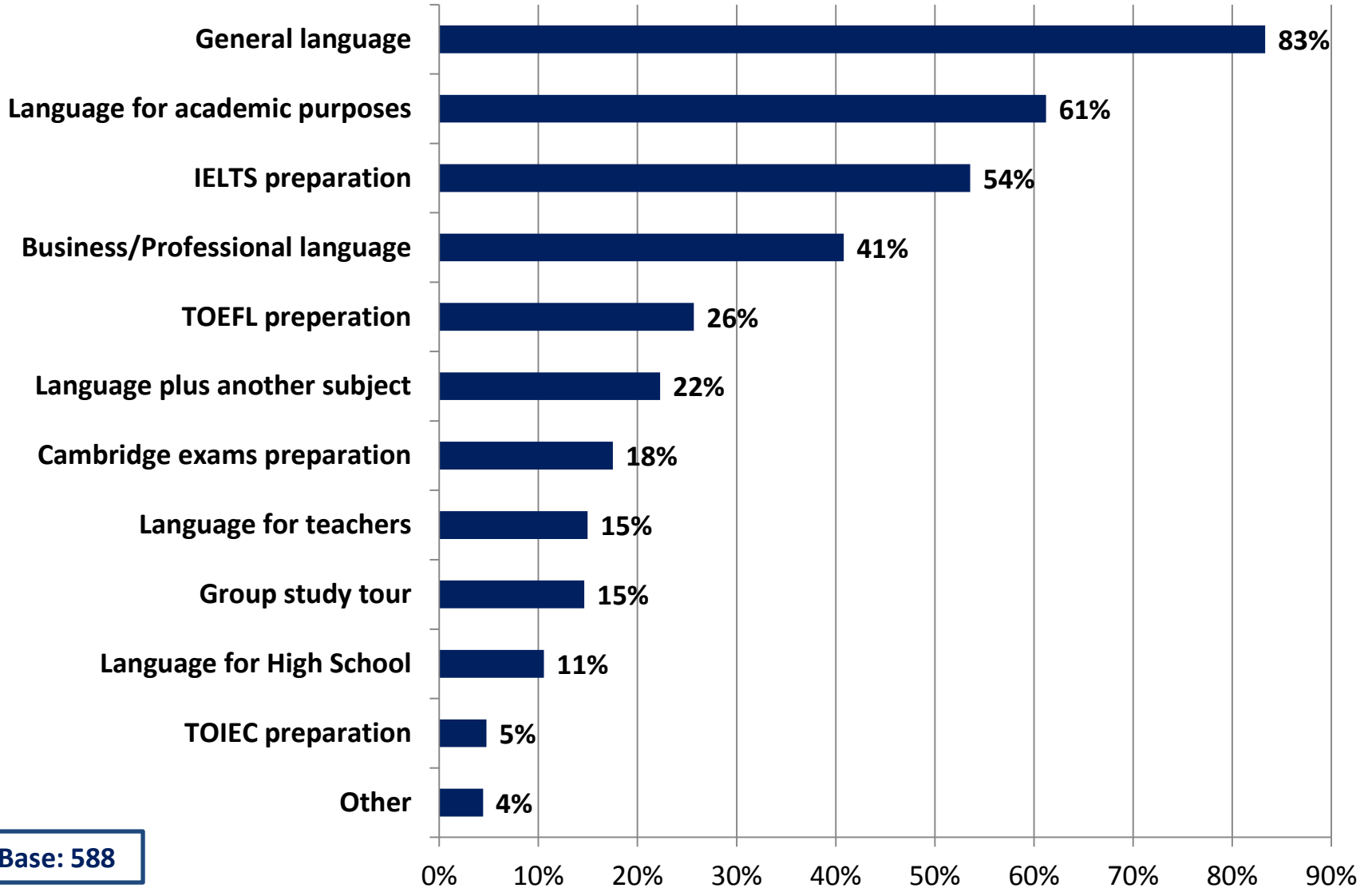


Base: 1020

Number of students placed in the last 12 months

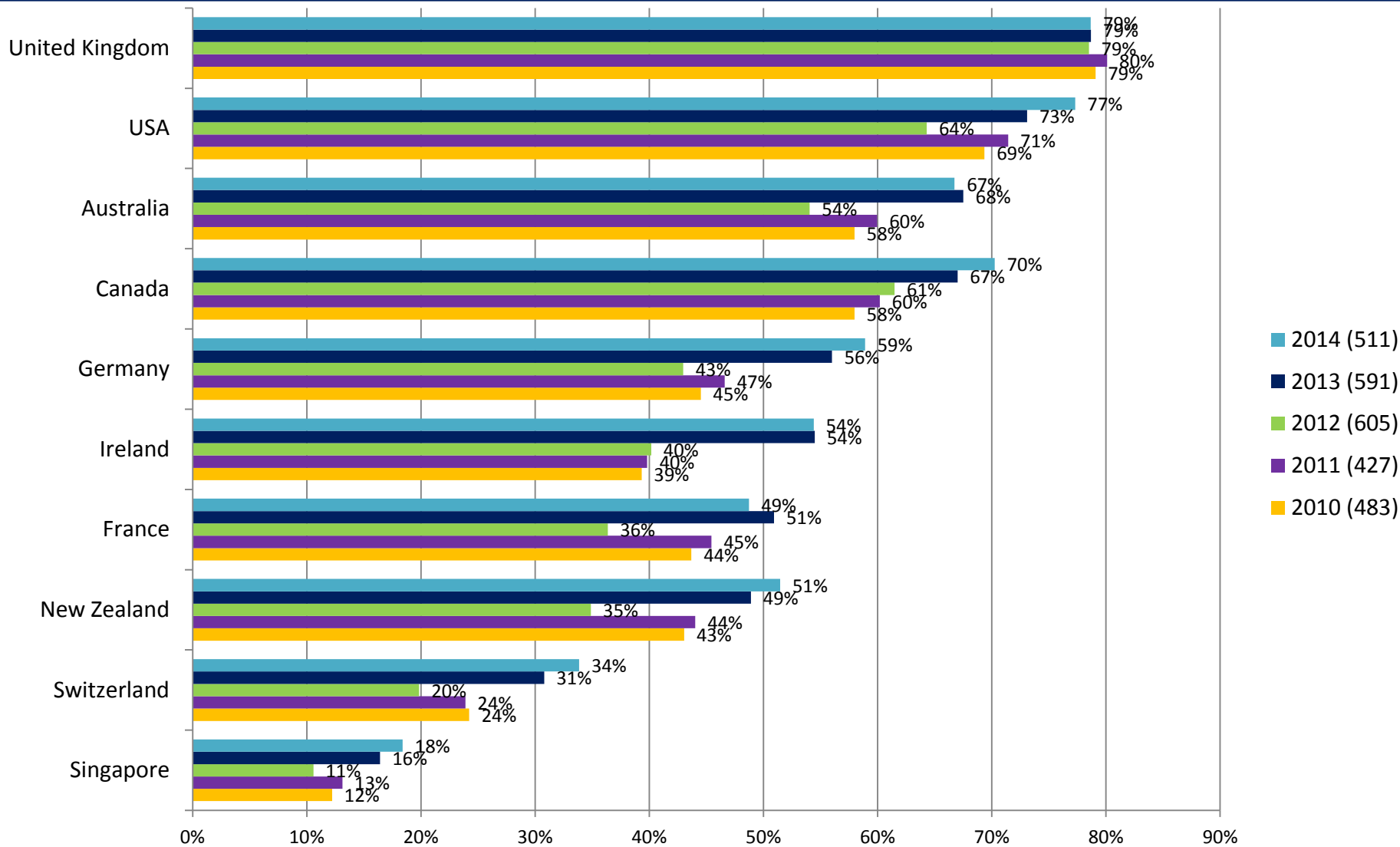


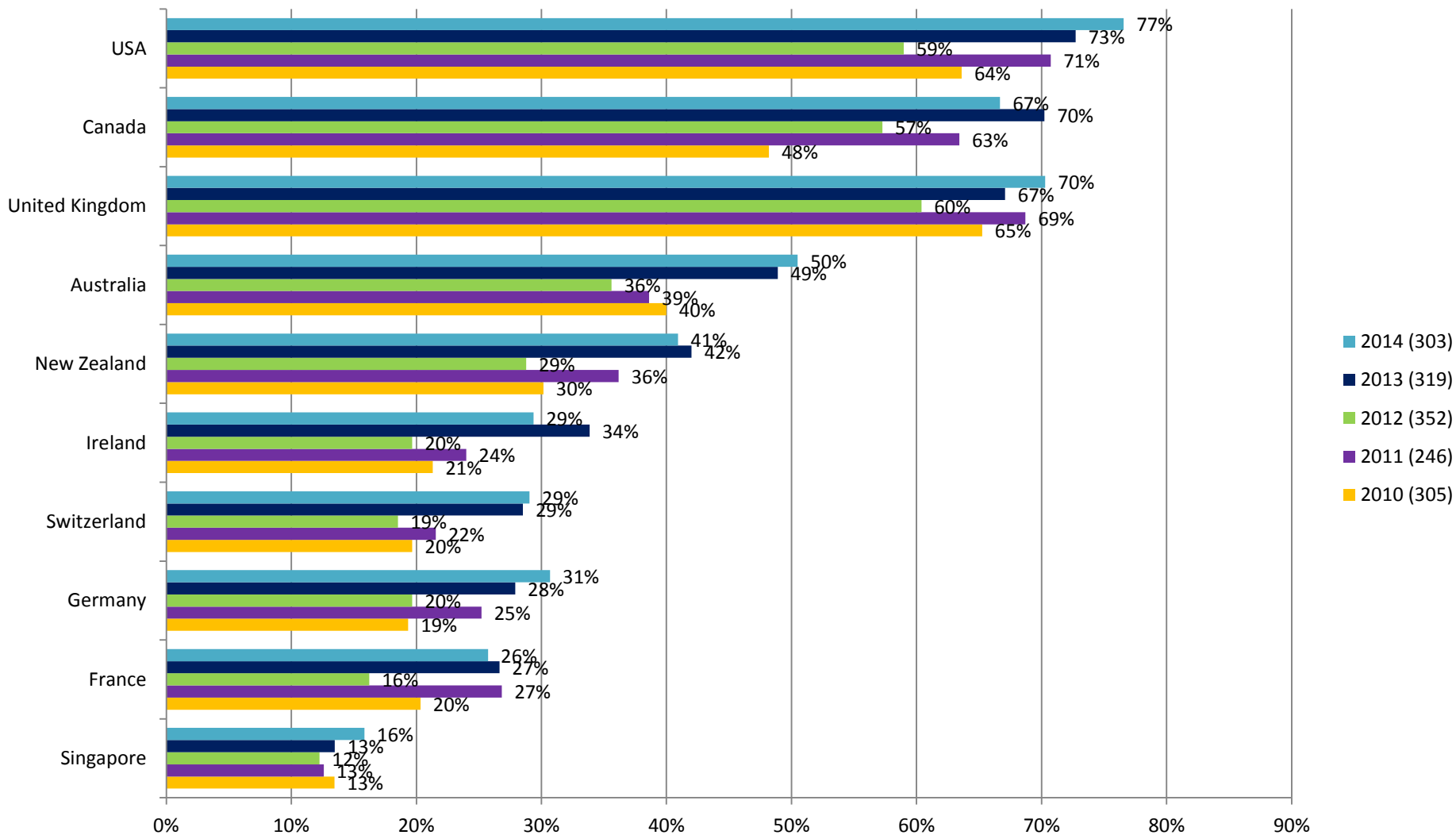
What kind of language courses do you place students in?



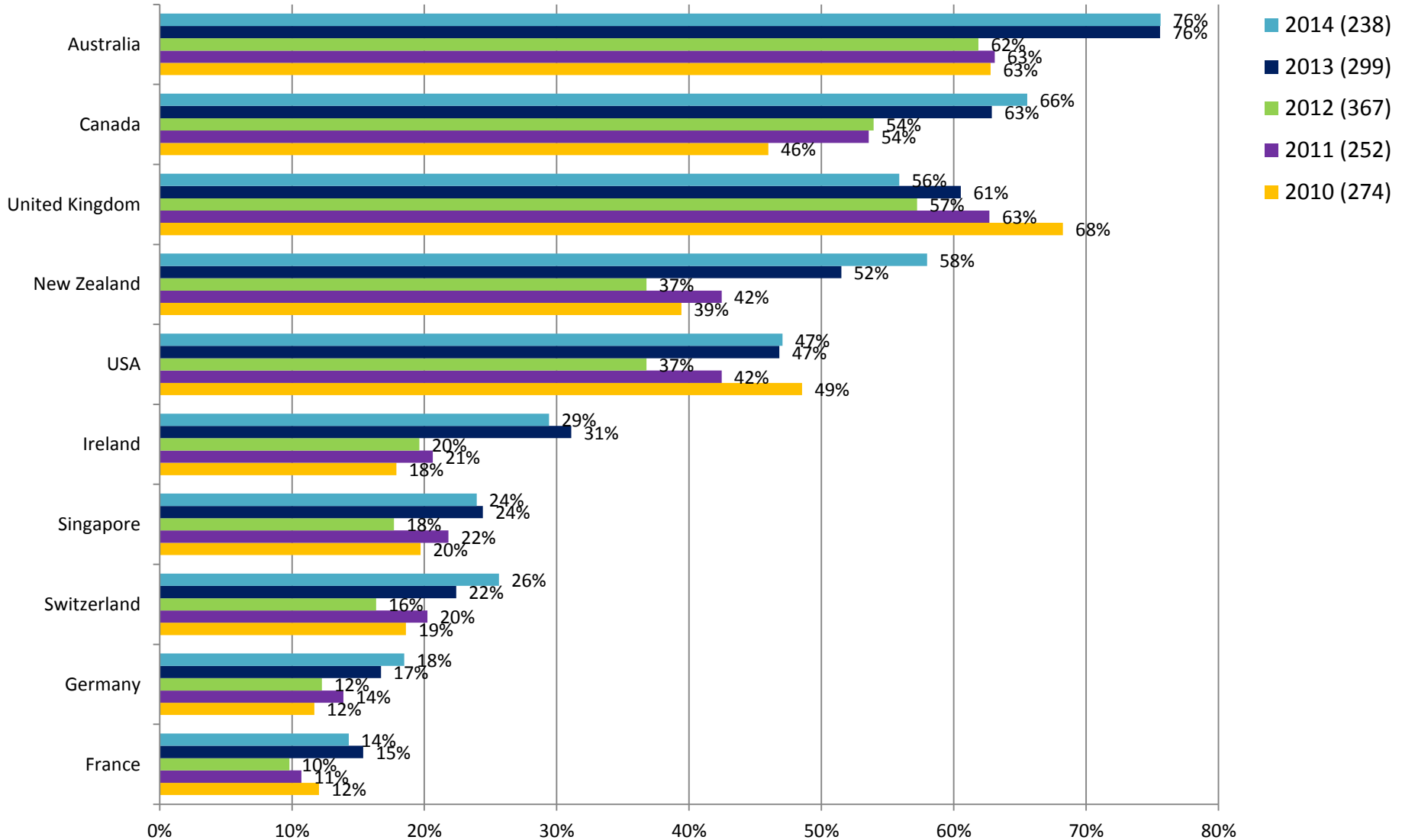
Number of students placed in the last 12 months: 5 year trend data

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

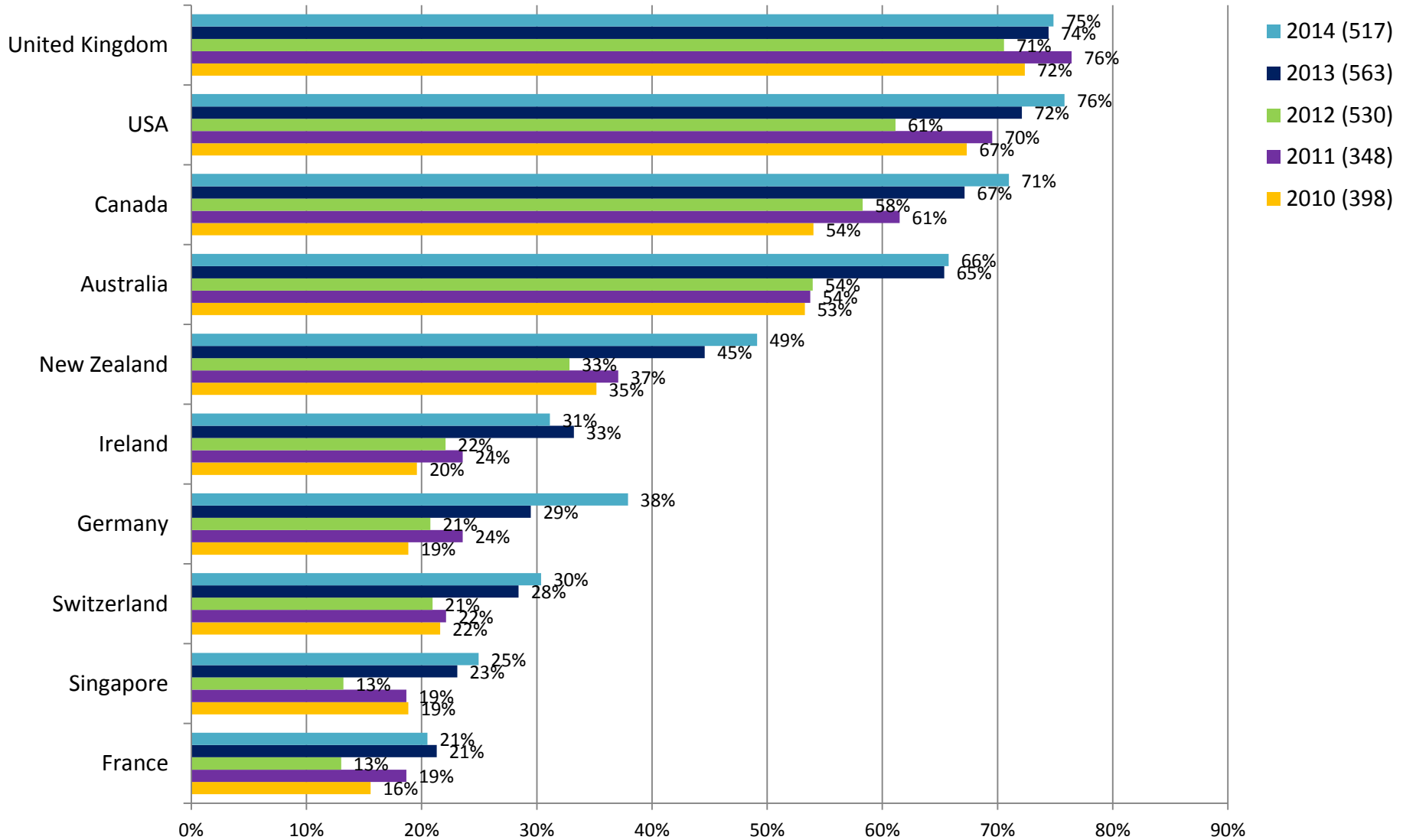




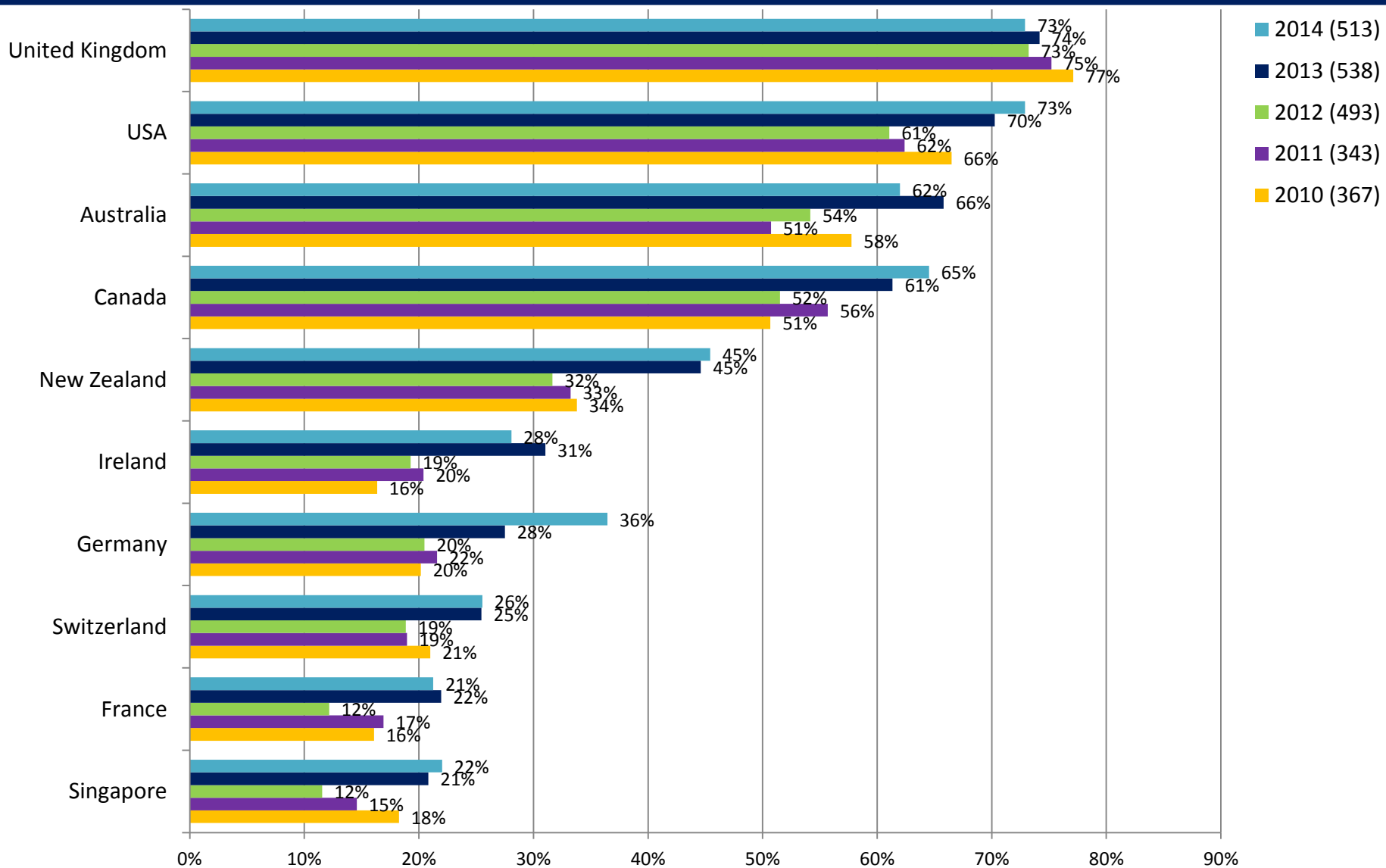
Top 10



Top 10



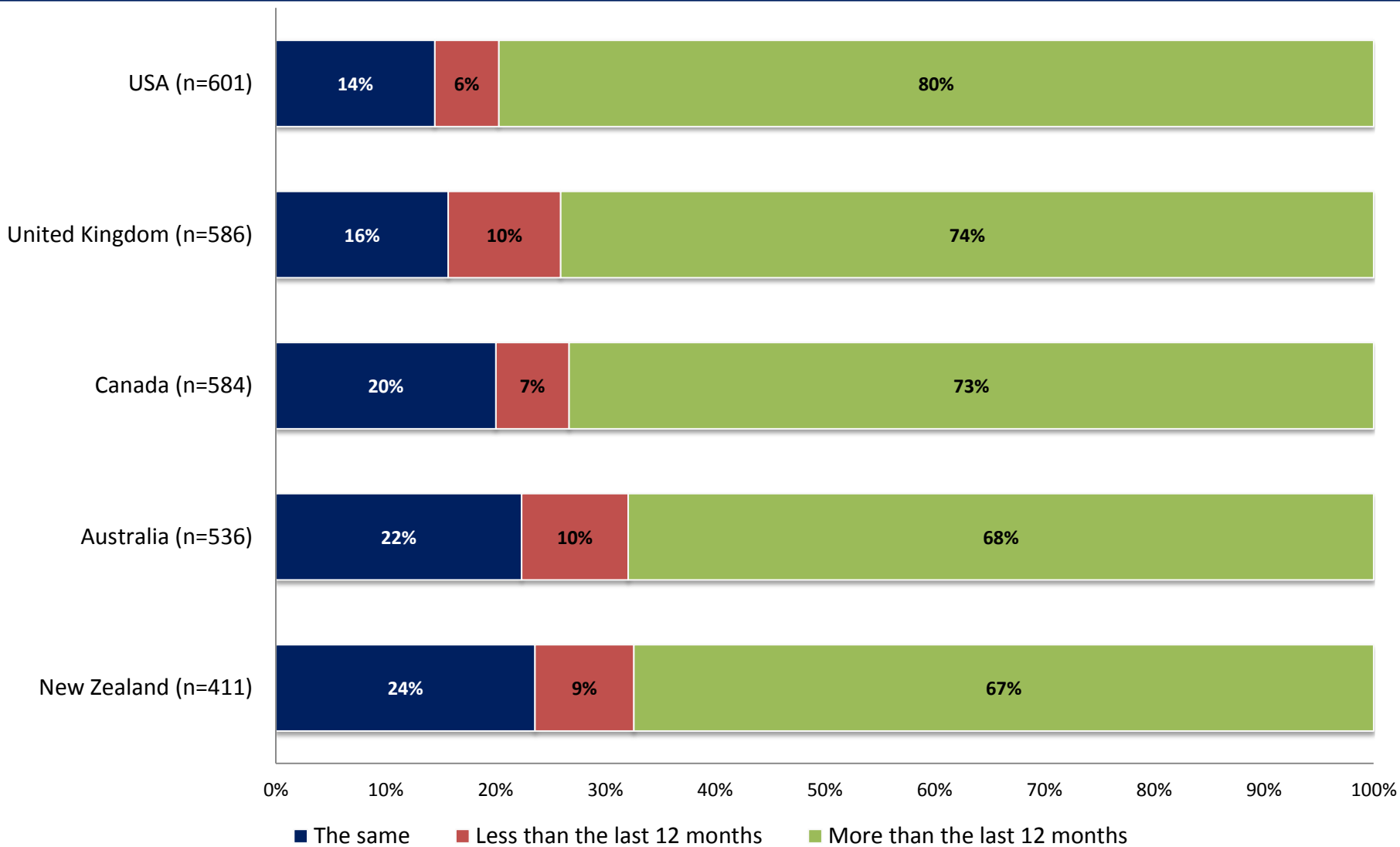
Top 10



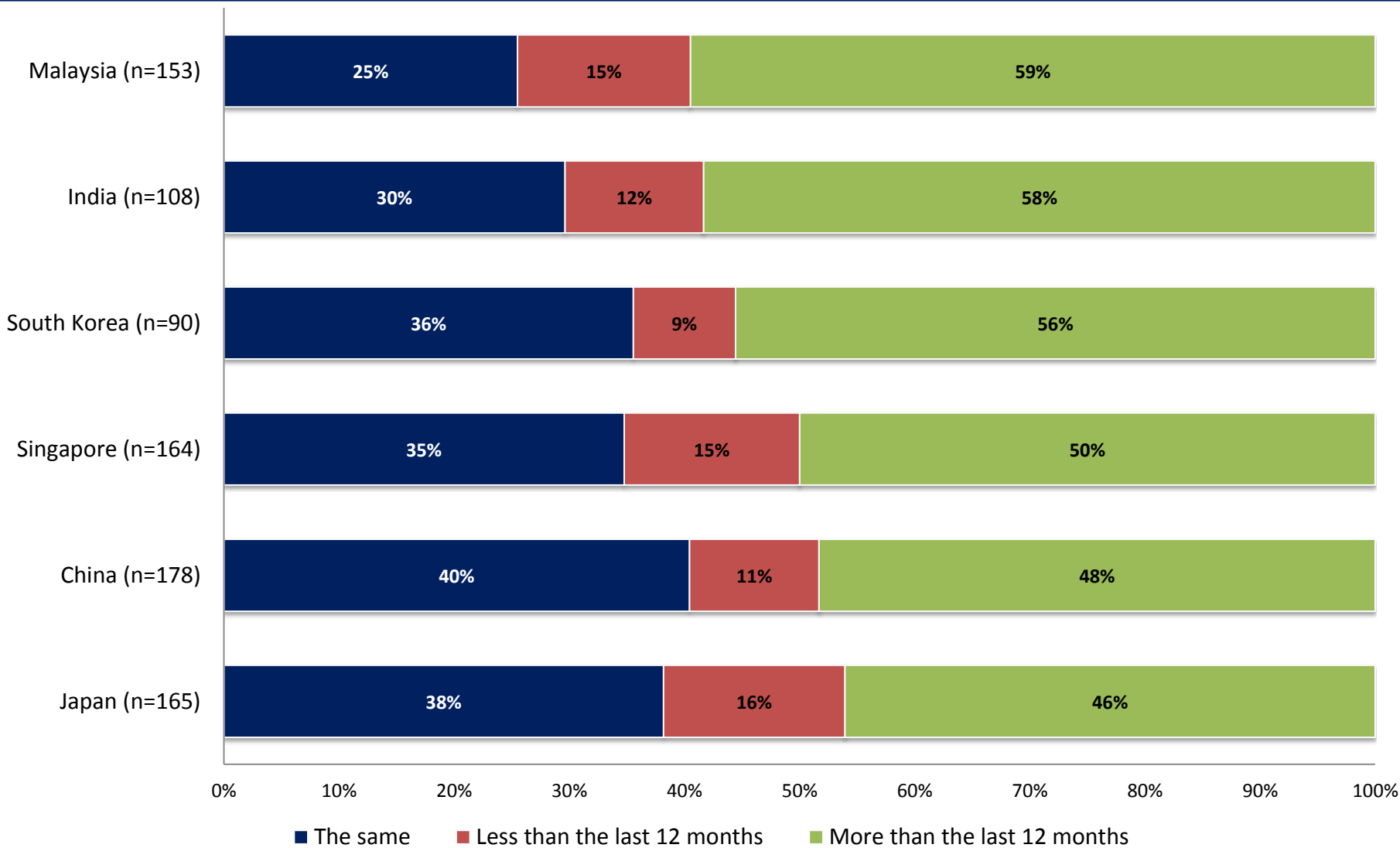
How many students do agents expect to place in the next 12 months?



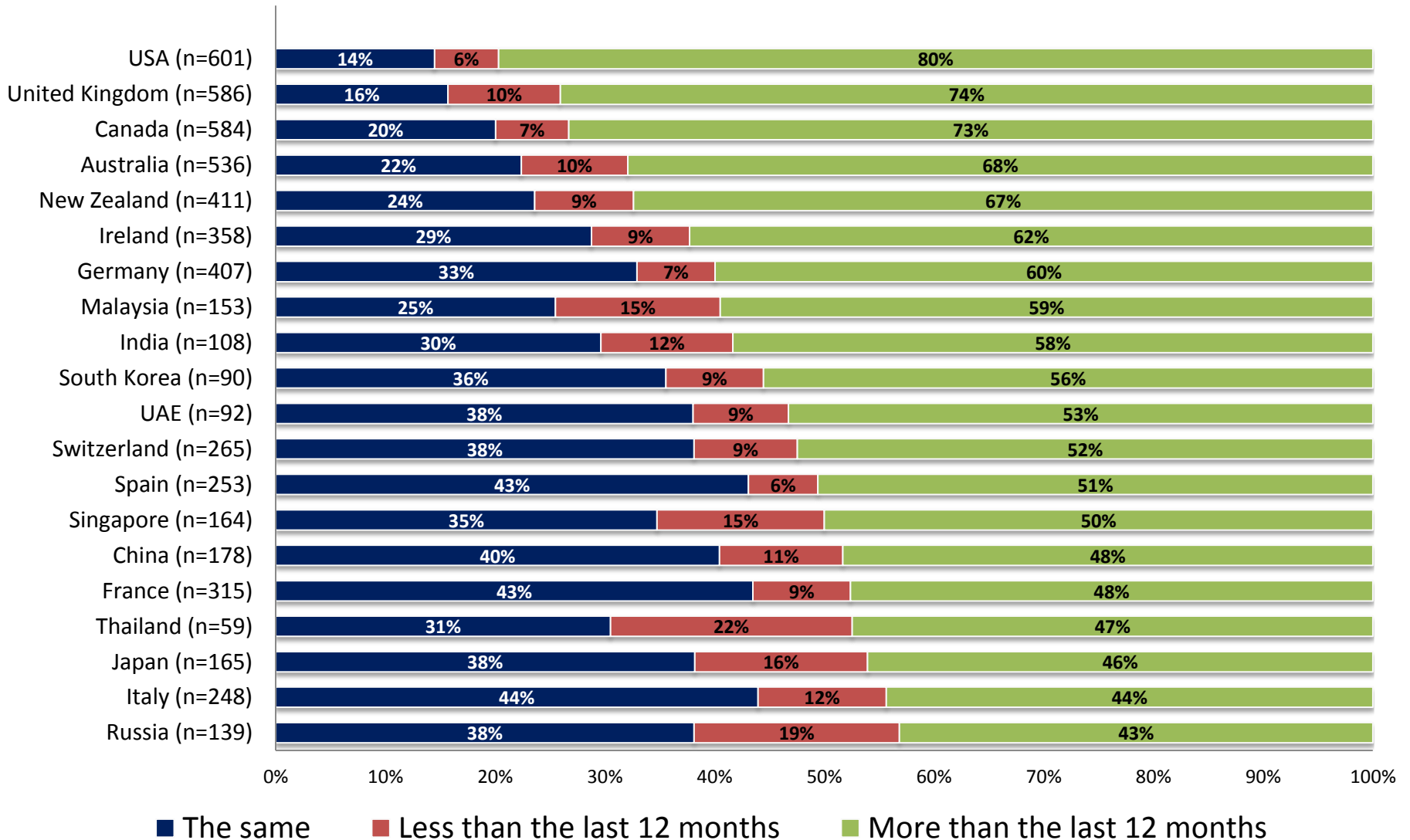
Approximately how many students do you expect to place overall in the next 12 month? **TRADITIONAL MARKETS**



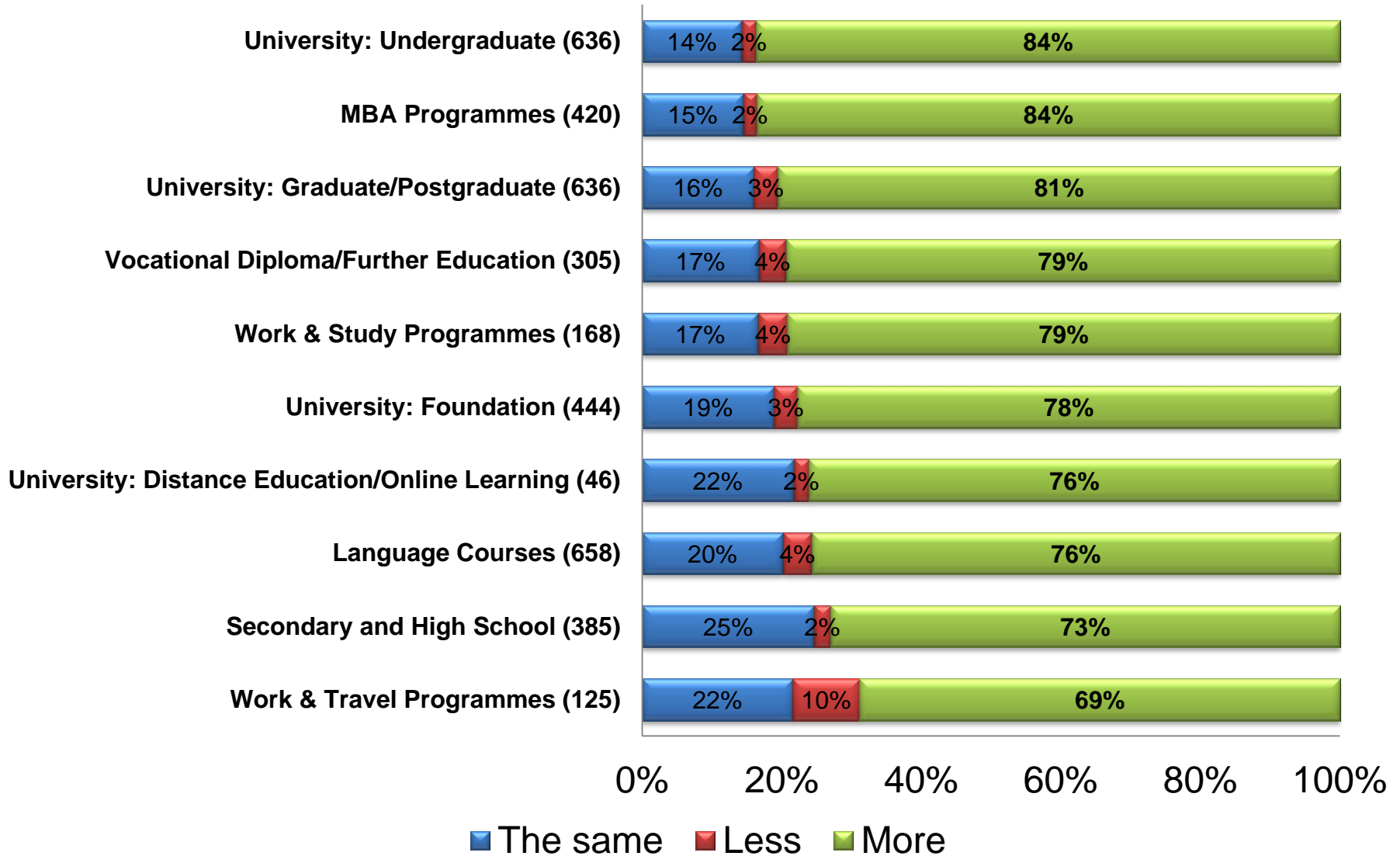
Approximately how many students do you expect to place overall in the next 12 month? **EMERGING MARKETS**



Approximately how many students do you expect to place overall in the next 12 months?



In the next coming 12 months do you expect to send more/less/the same?

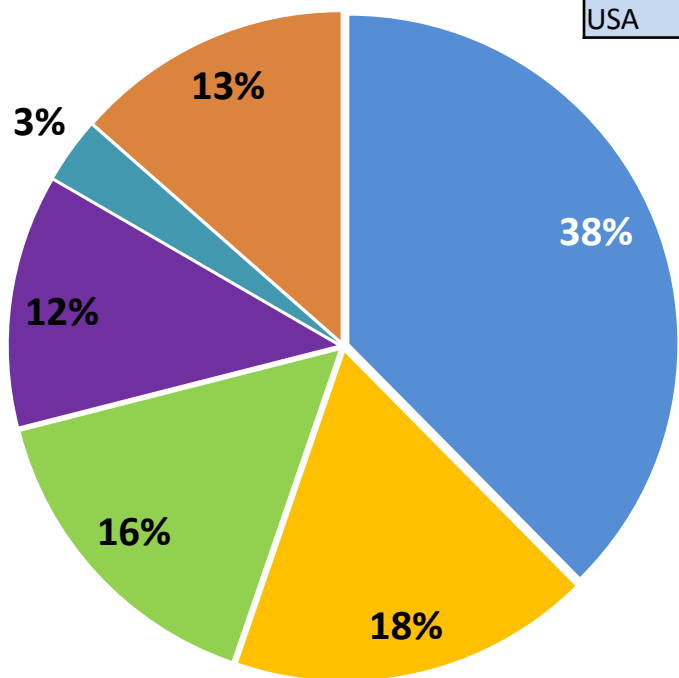


Which country is best...?
By type of study



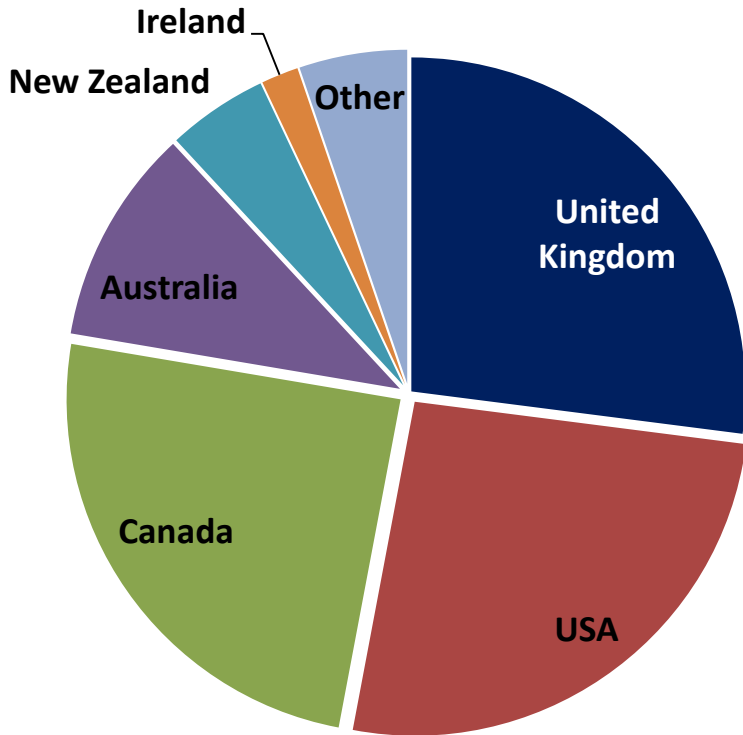
Which study destination is best for language study?

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

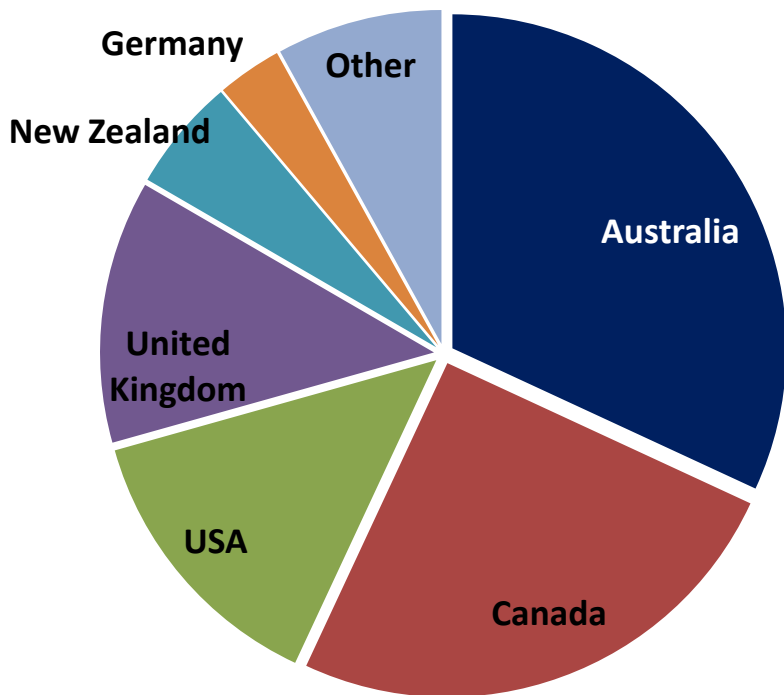


- United Kingdom
- Australia
- Canada
- USA
- Ireland
- Other

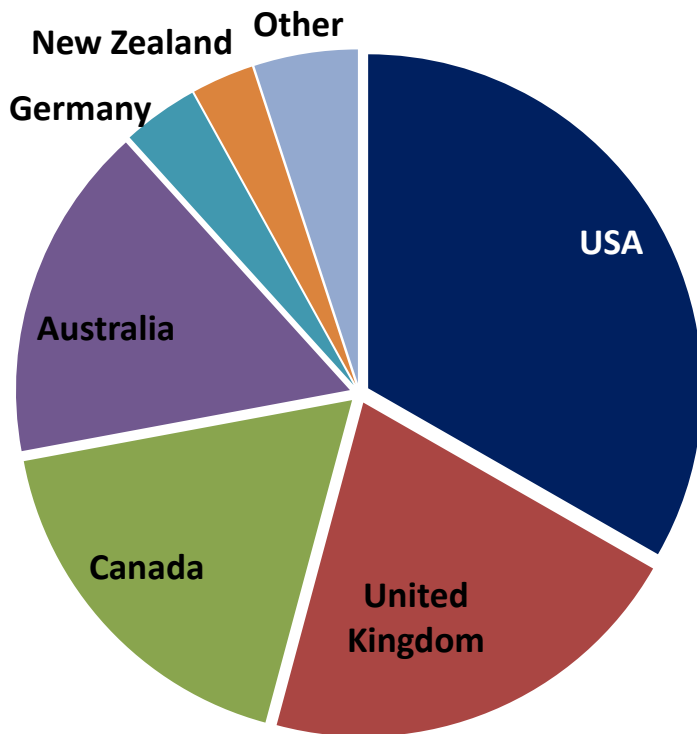
Which study destinations is best for Secondary and high schools?



	% 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

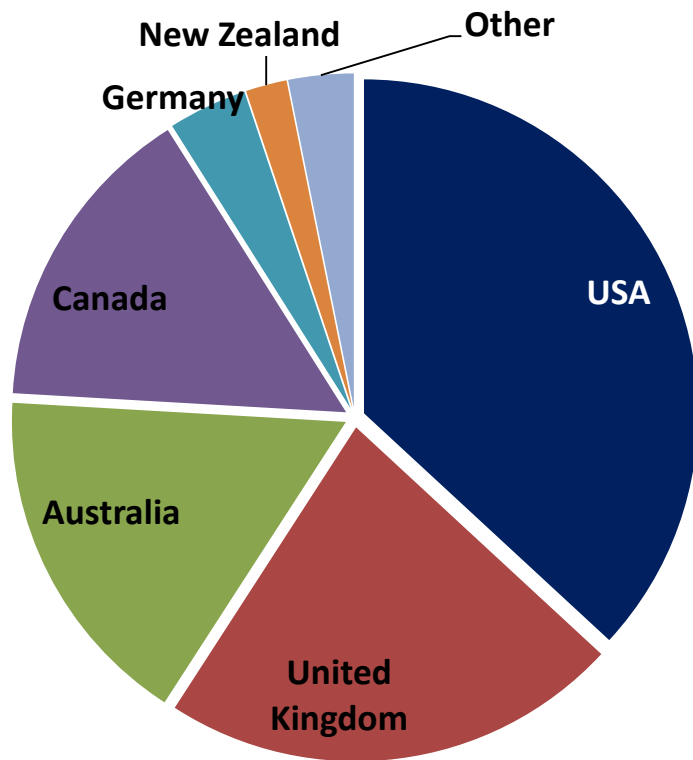


	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
Australia	32%	1	1	1	1	1	2
Canada	25%	2	2	3	3	4	4
United Kingdom	13%	4	3	2	2	2	1
USA	14%	3	4	4	4	3	3
New Zealand	5%	5	5	5	5	5	5



	% 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

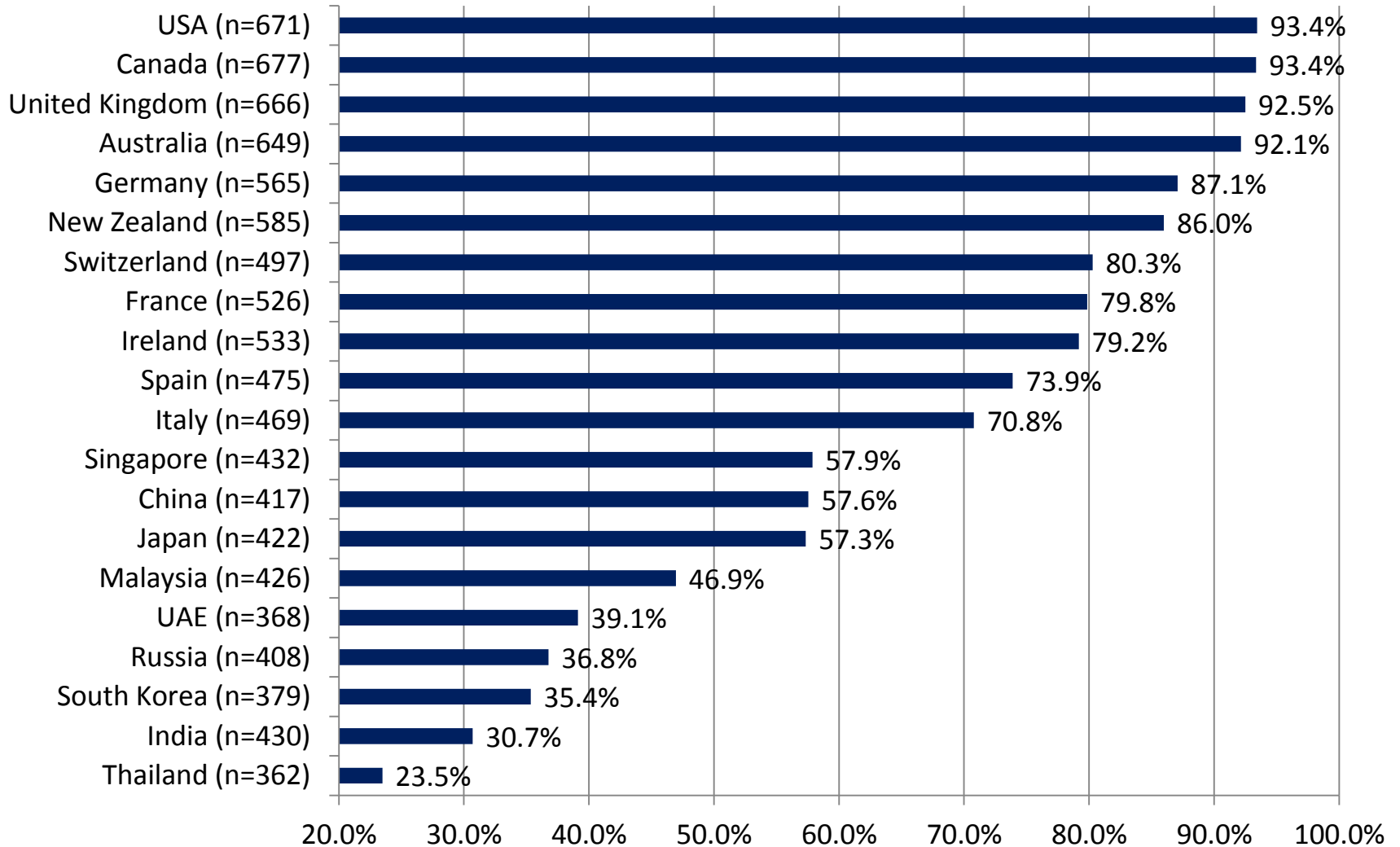
Which study destinations is best for Graduate Study?



	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
USA	37%	1	1	1	1	1	1
United Kingdom	22%	2	2	2	2	2	2
Australia	17%	3	3	4	4	3	3
Canada	15%	4	4	3	3	4	4

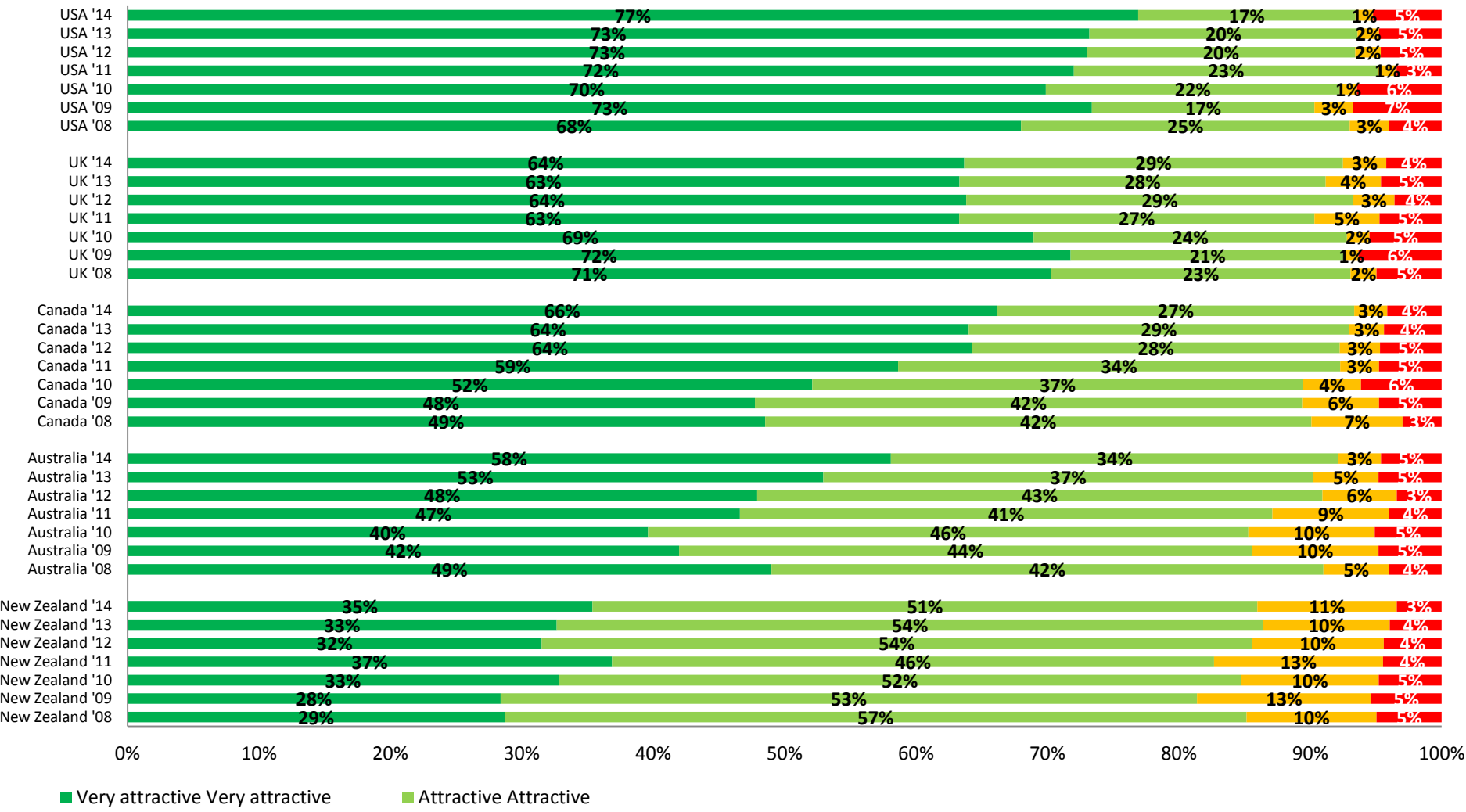
Overall attractiveness of study destinations

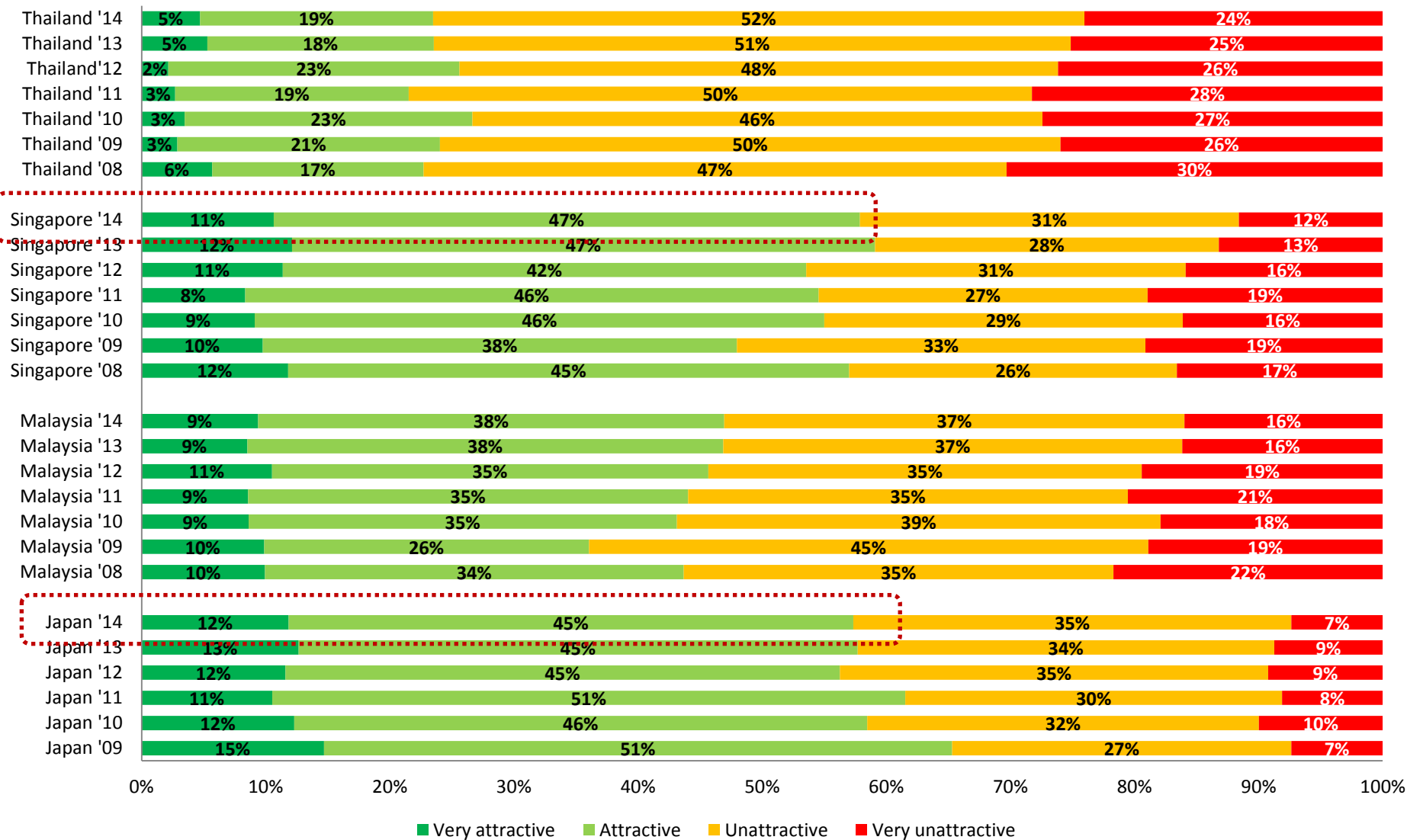




Traditional markets remain top of 'attractive' list

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





Overall attractiveness of Study Destinations in 2014

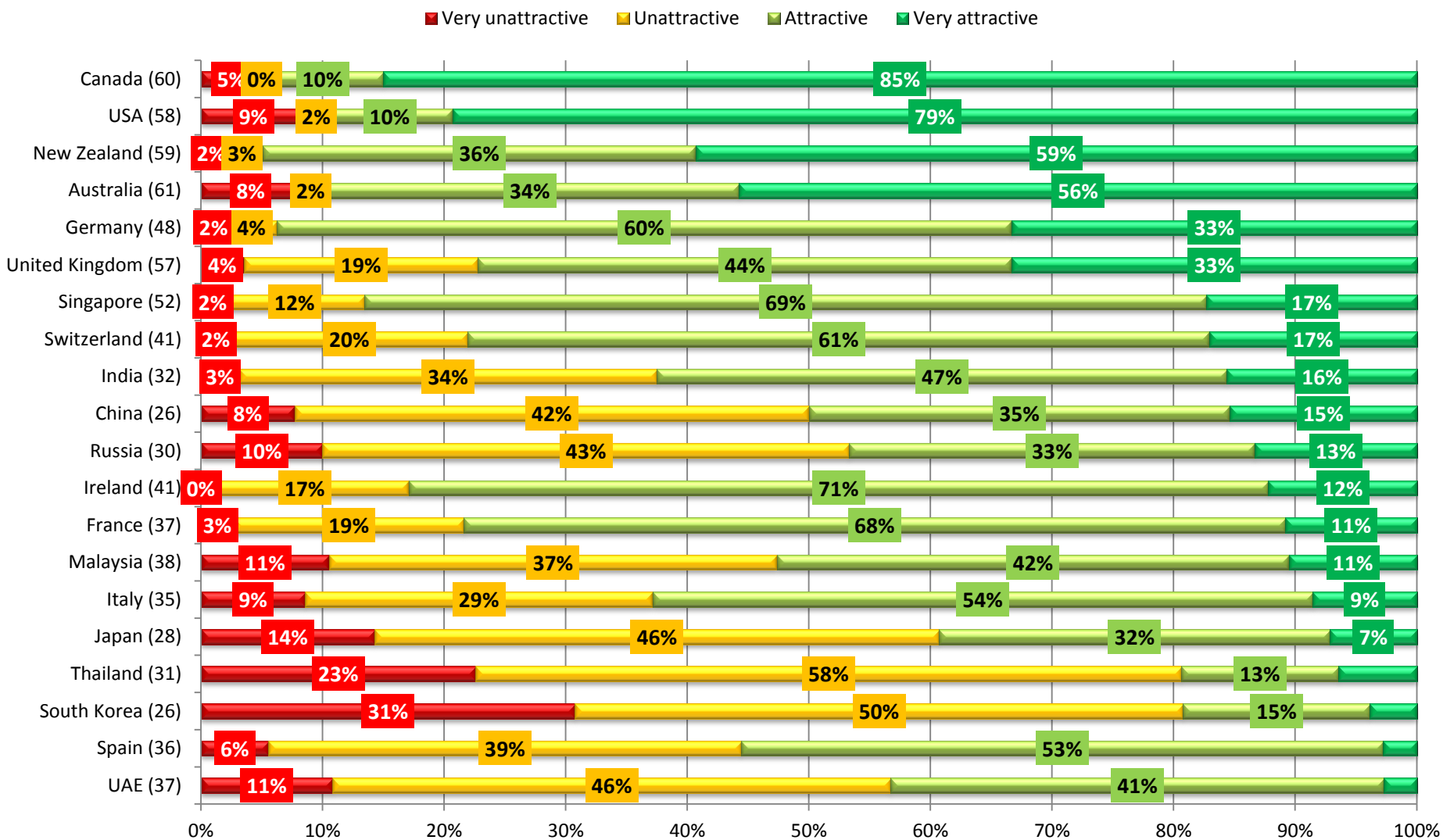
	Africa		Asia		Europe		Latin America and the Caribbean	
Study Destination	Average	Base	Average	Base	Average	Base	Average	Base
USA	3.66	50	3.58	311	3.73	186	3.66	94
Canada	3.63	51	3.47	309	3.58	191	3.71	92
United Kingdom	3.40	50	3.38	303	3.77	193	3.53	92
Australia	3.37	41	3.41	316	3.44	174	3.64	85
Germany	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)

Study Destination	EU		non-EU	
	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

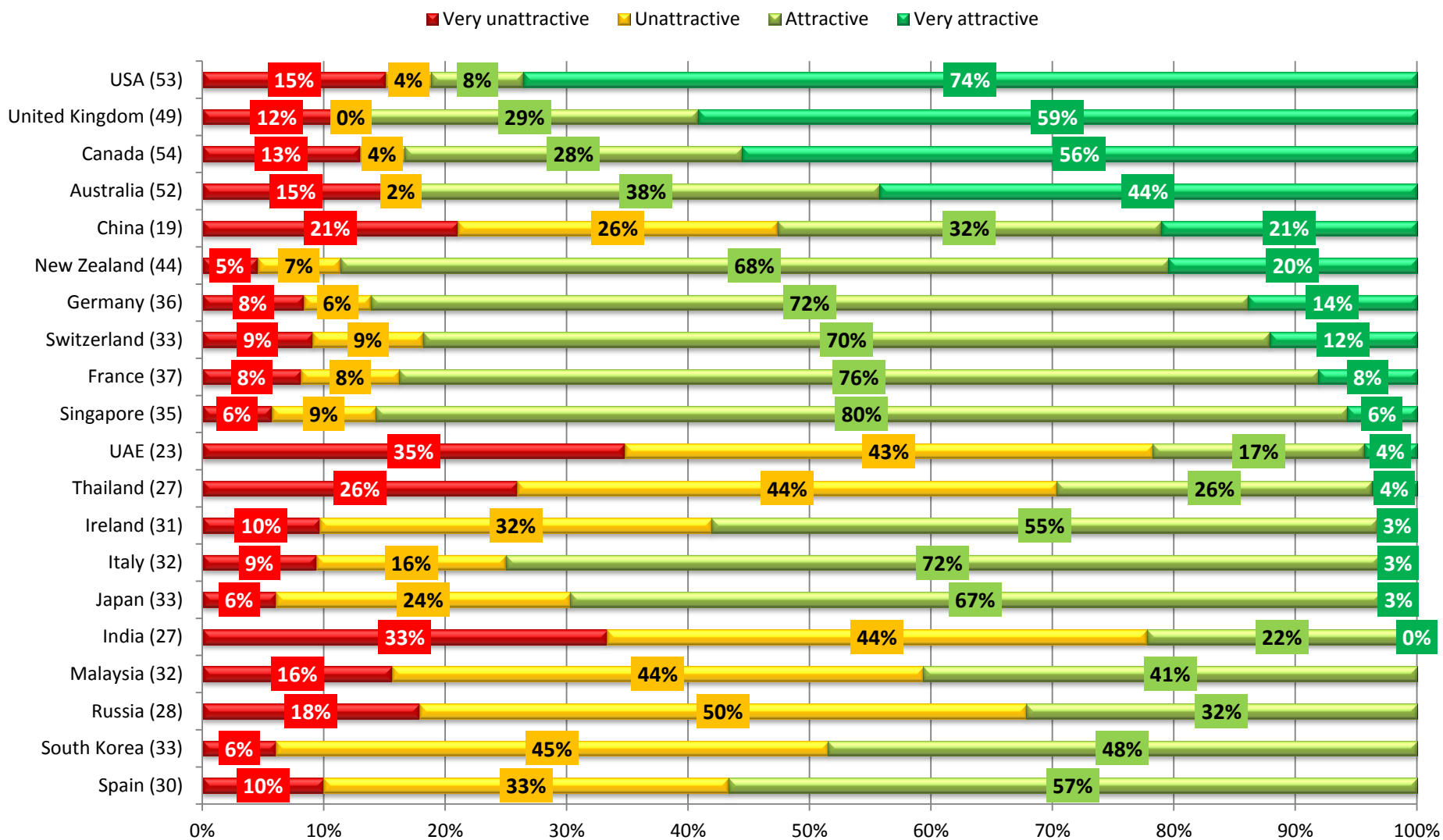
Table shows the mean scores calculated from a 4 point scale
(4=very attractive, 1= very unattractive)

Indian Agents



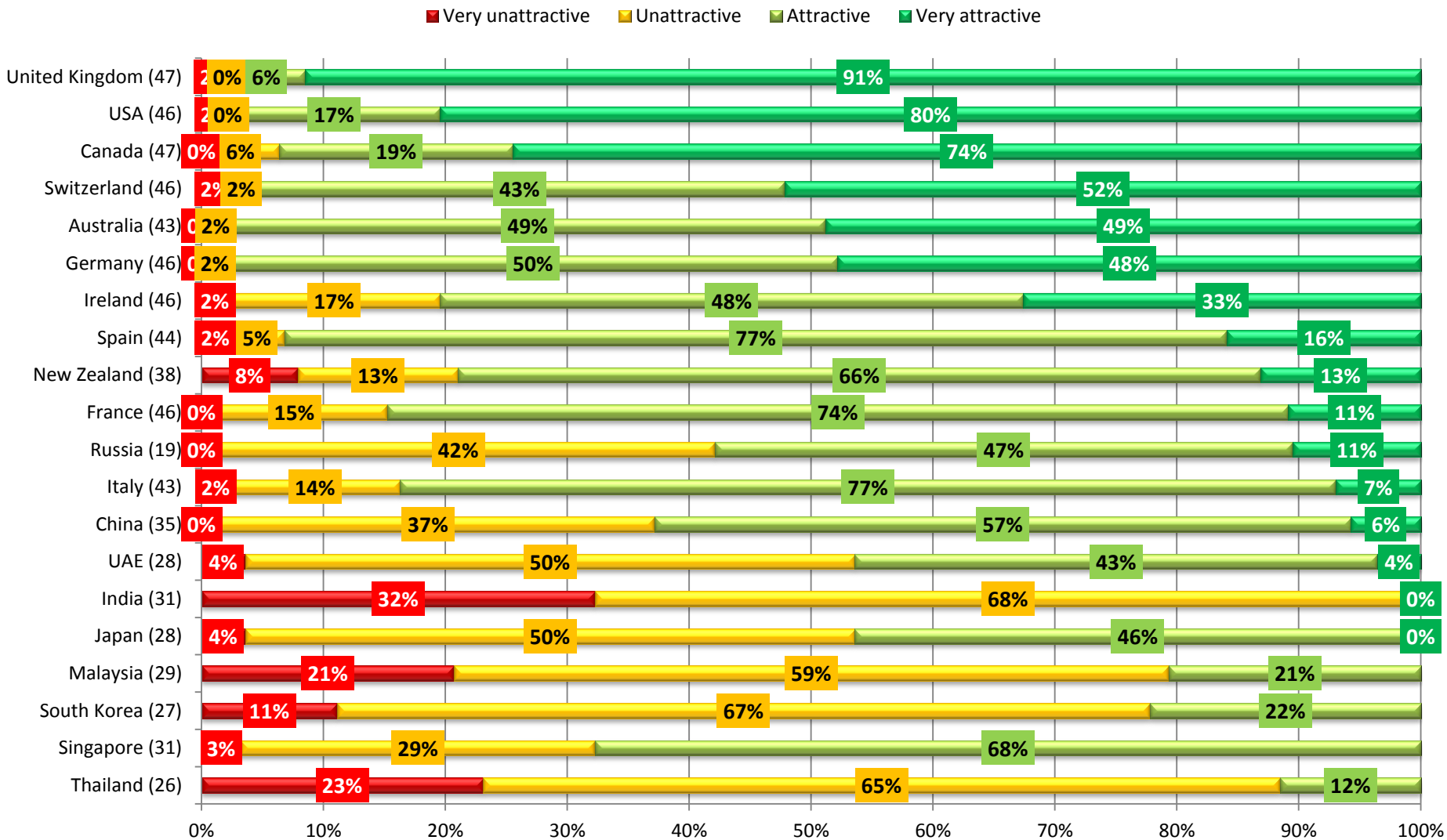
Note: Excludes respondents that indicated they 'Do not know'

Chinese Agents



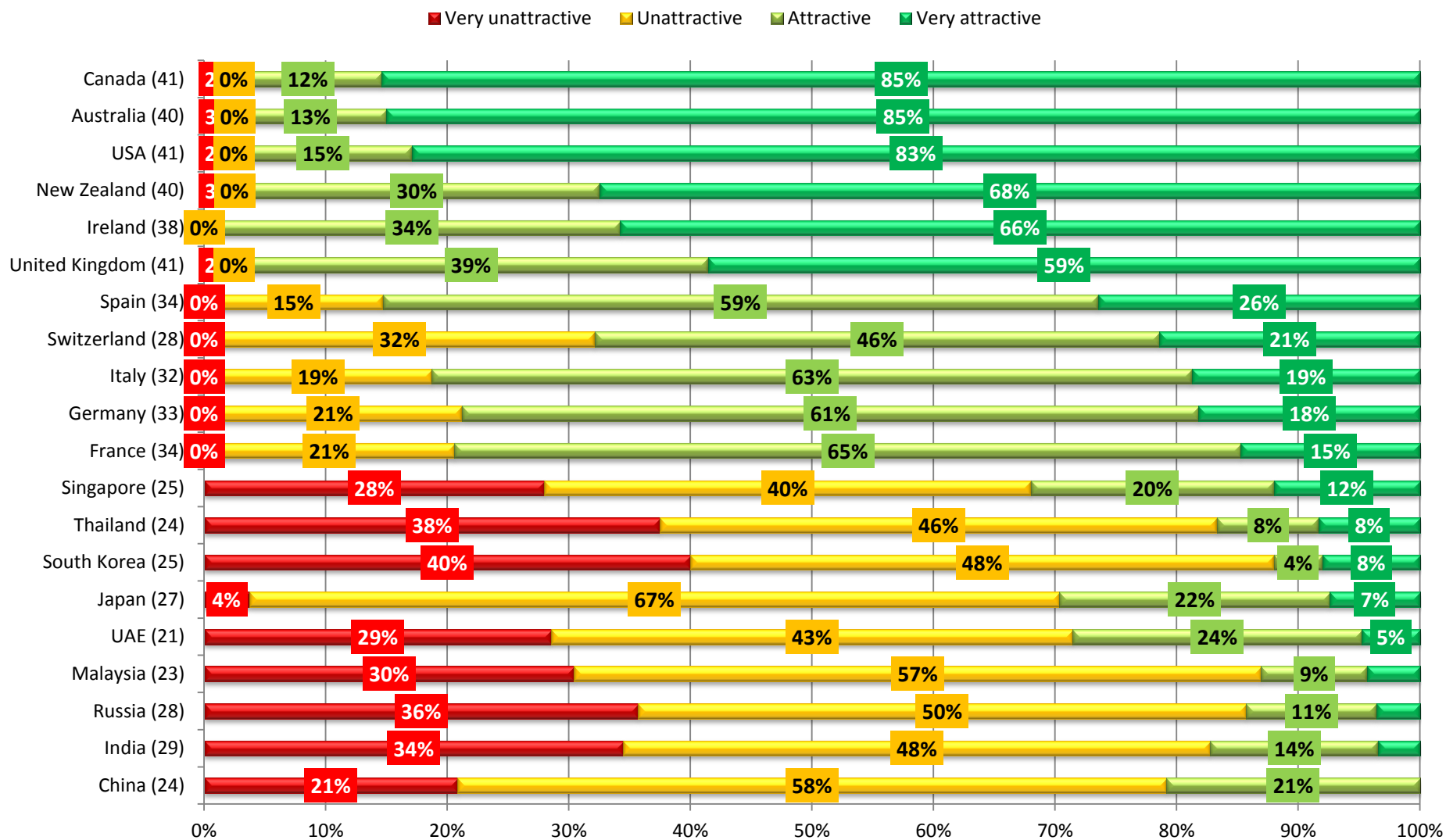
Note: Excludes respondents that indicated they 'Do not know'

Russian Agents



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

Brazilian Agents



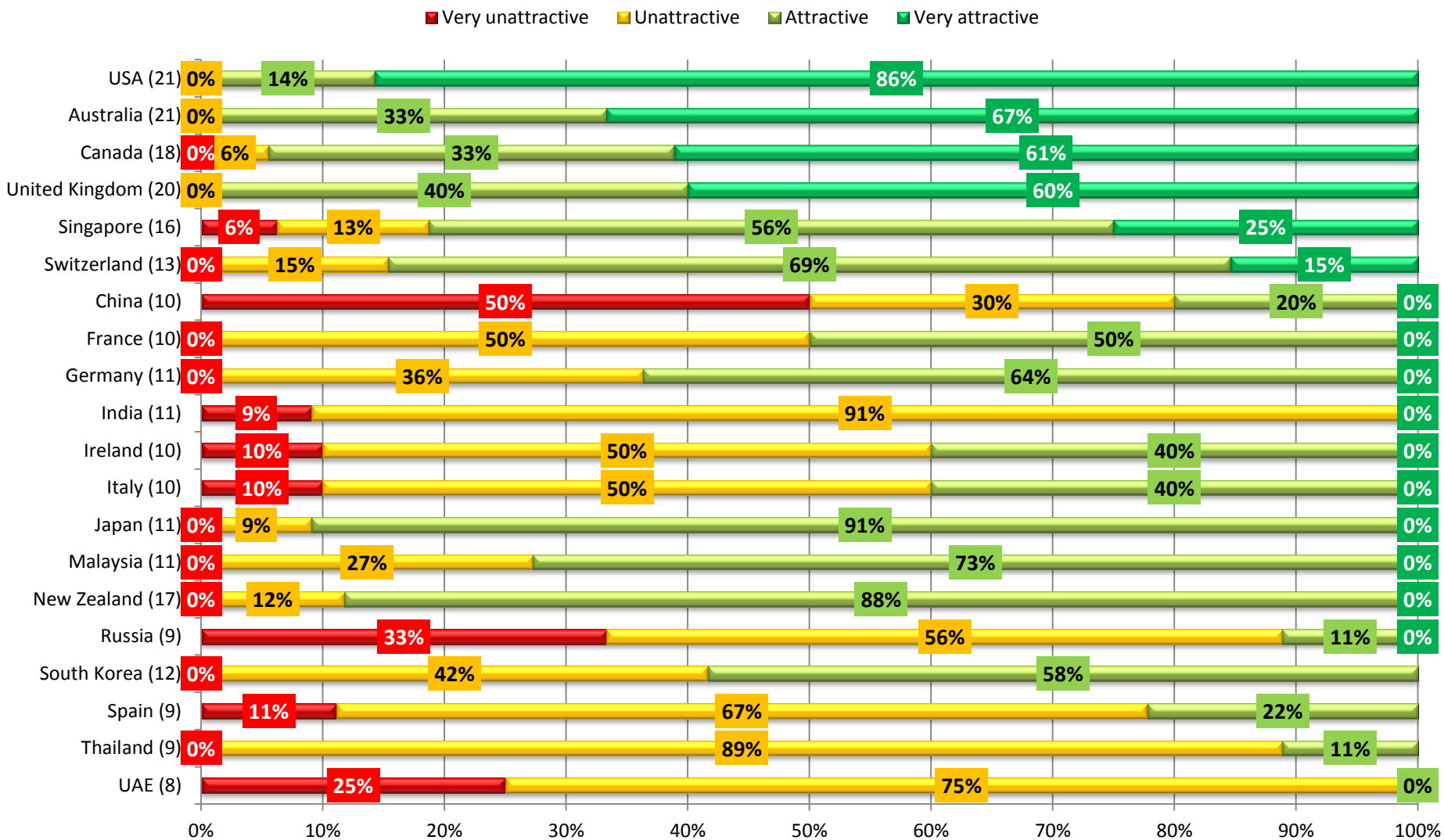
Note: Excludes respondents that indicated they 'Do not know'

Nigerian Agents



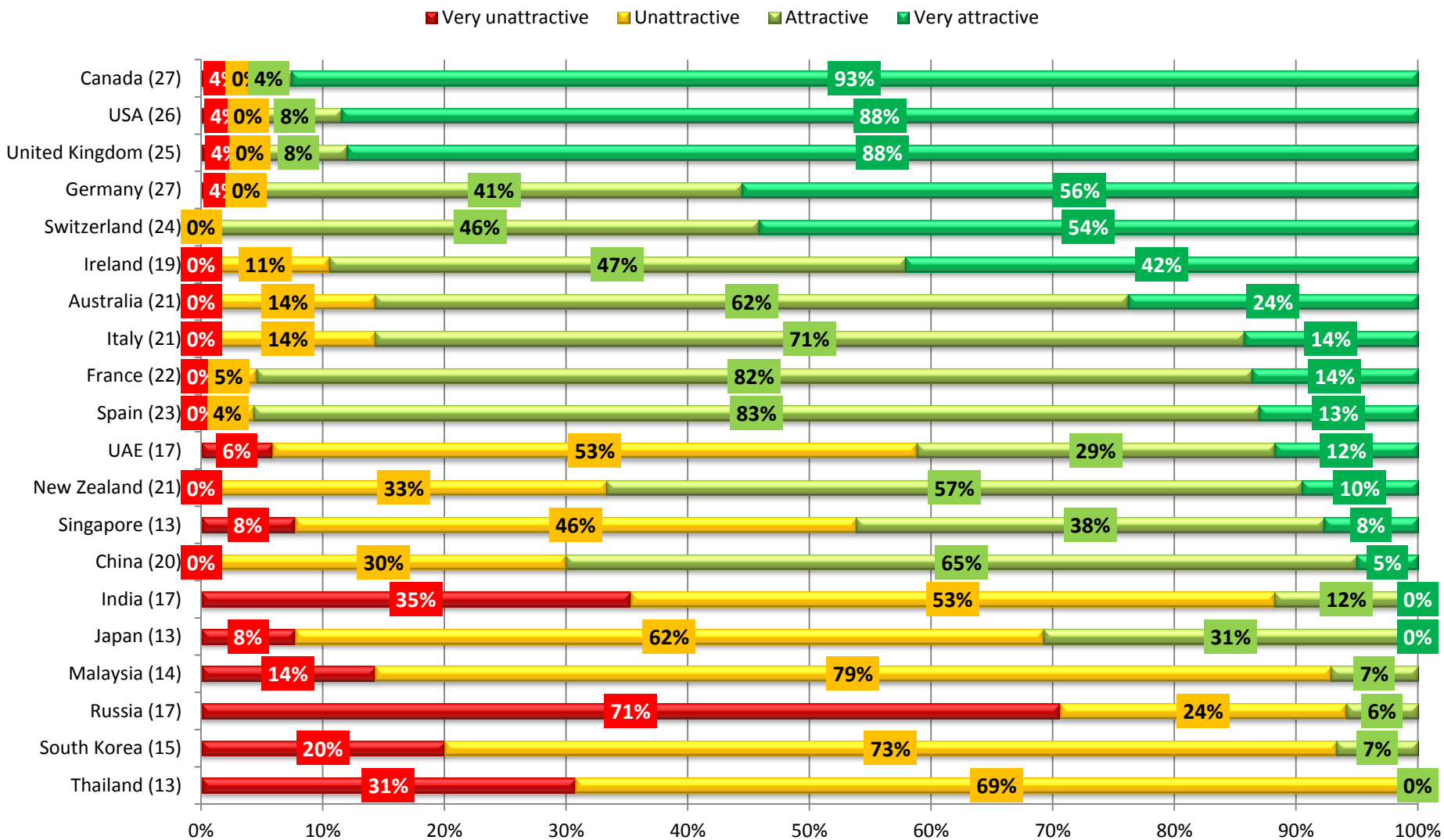
Note: Excludes respondents that indicated they 'Do not know'

Vietnamese Agents



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

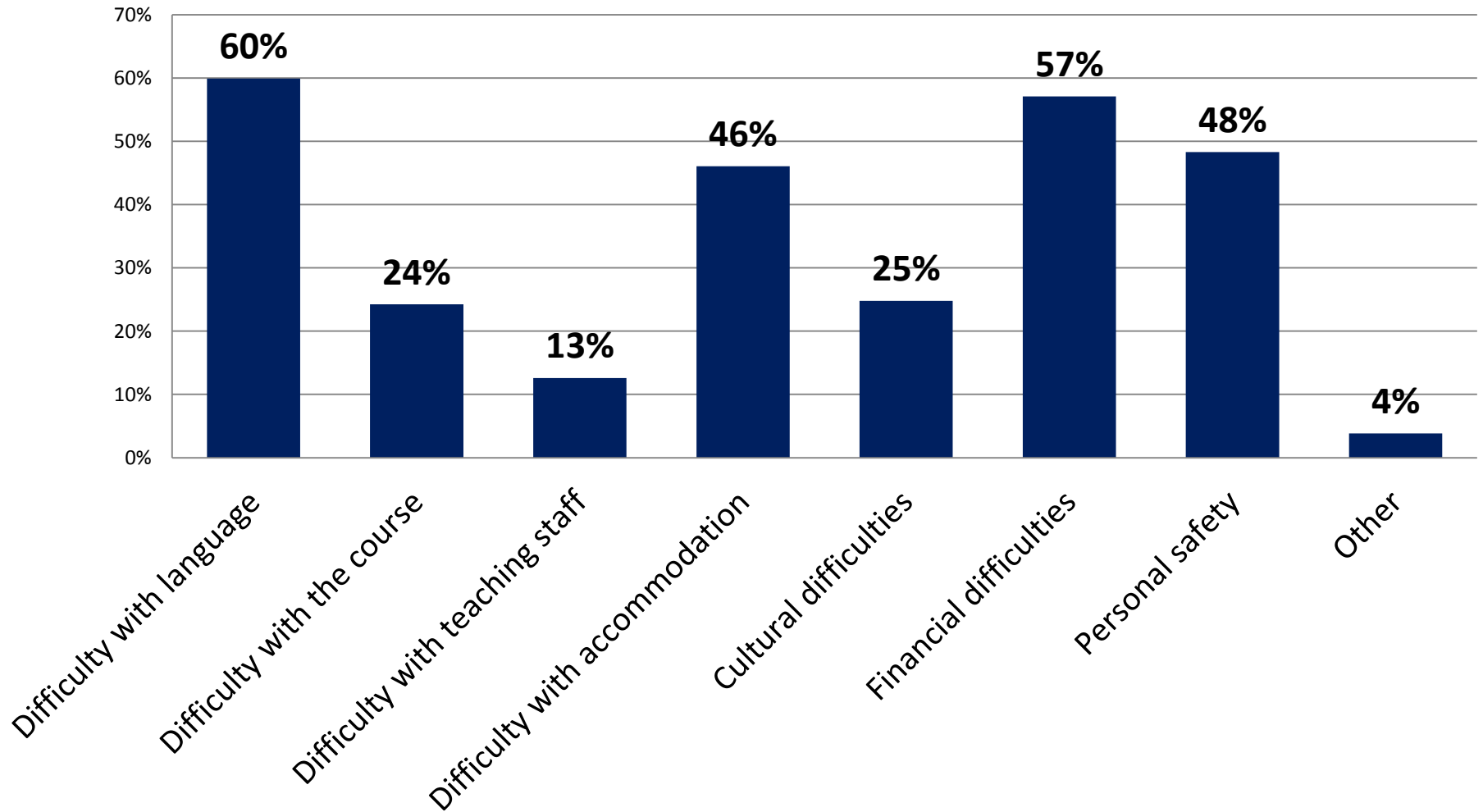
Ukrainian Agents



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

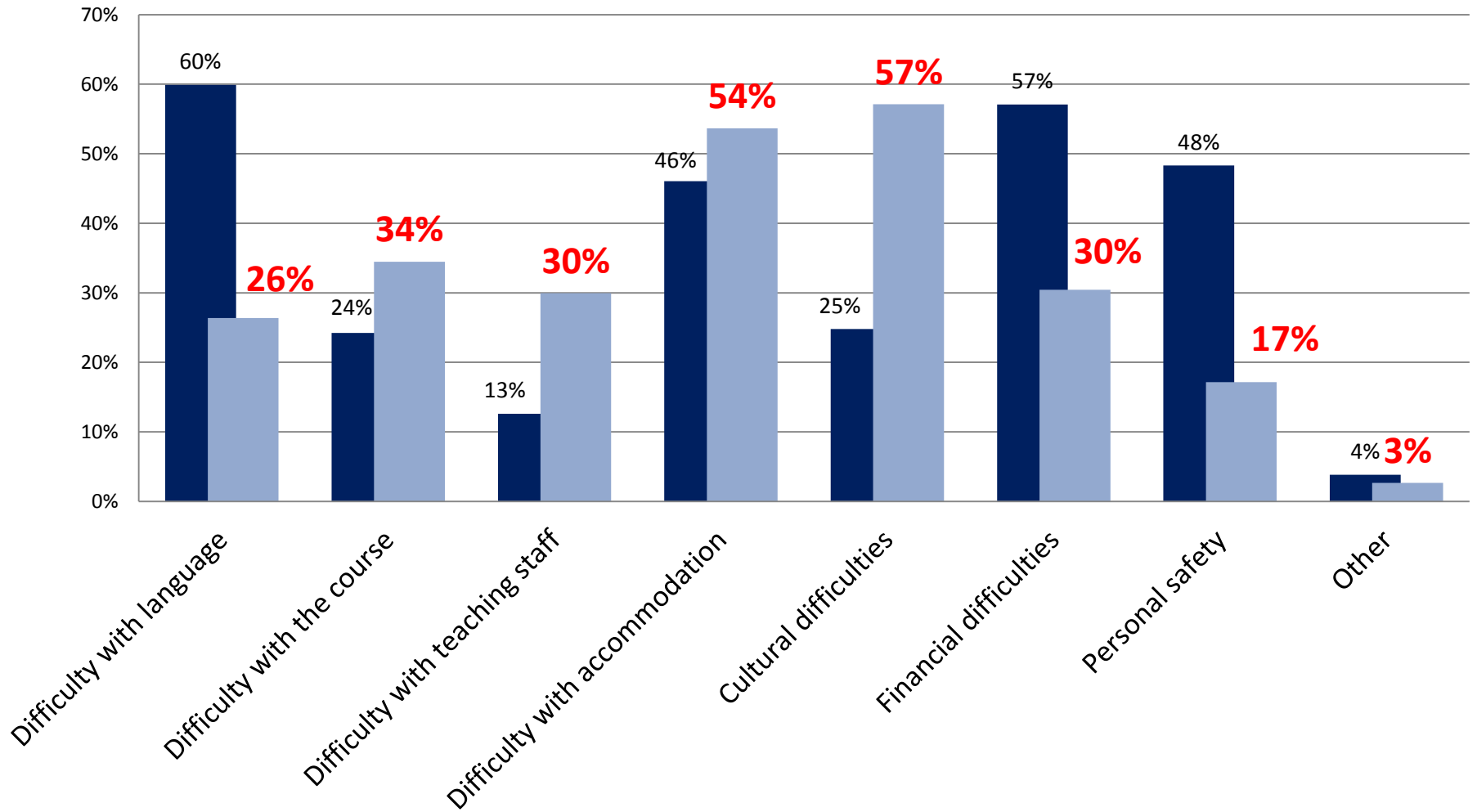
Student mobility concerns/difficulties in 2014

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



n=706

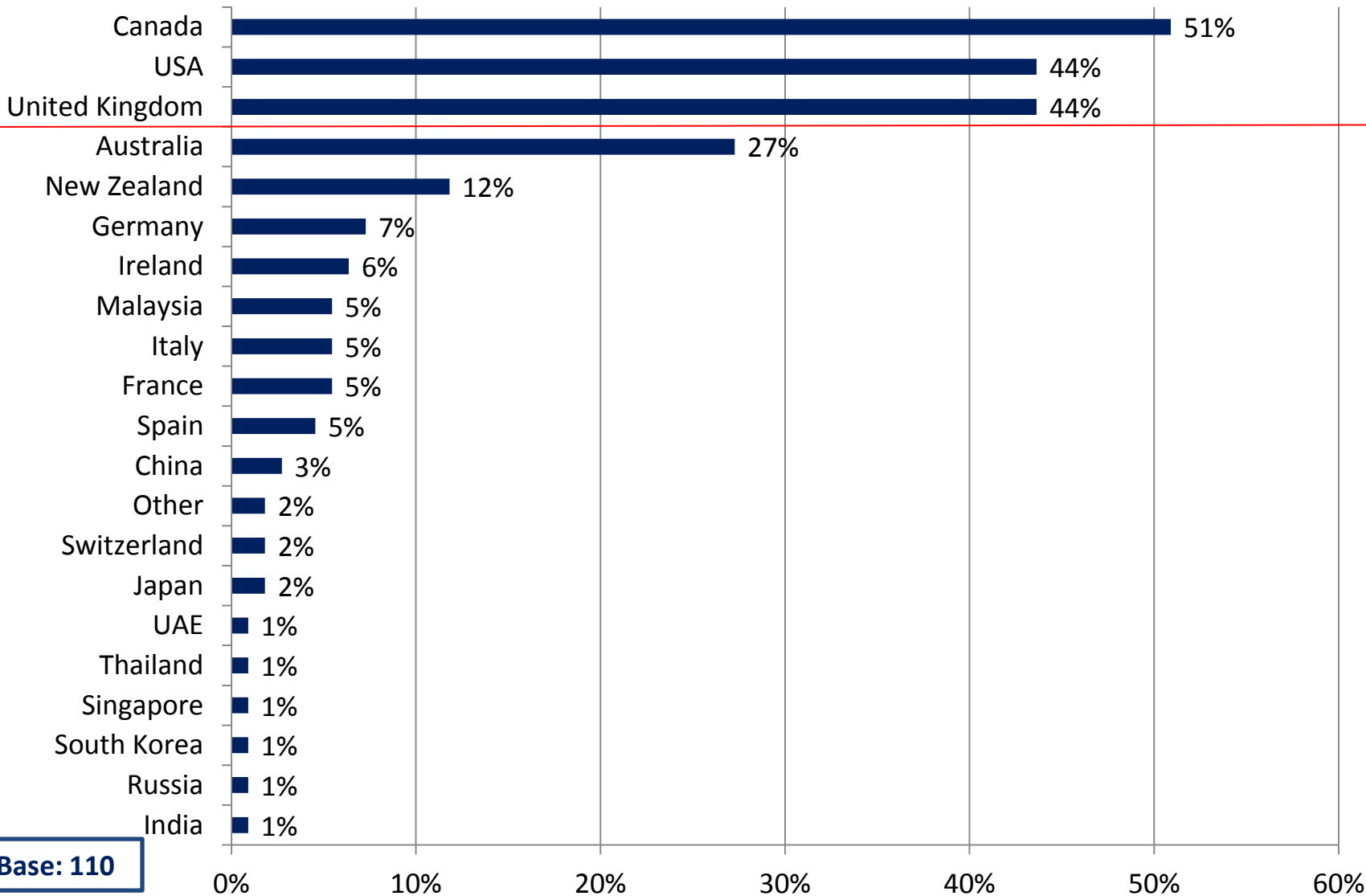
Main concerns *students and parents* have *BEFORE AND AFTER* departing for international study:



n=706

In which countries did you experience these concerns/difficulties?

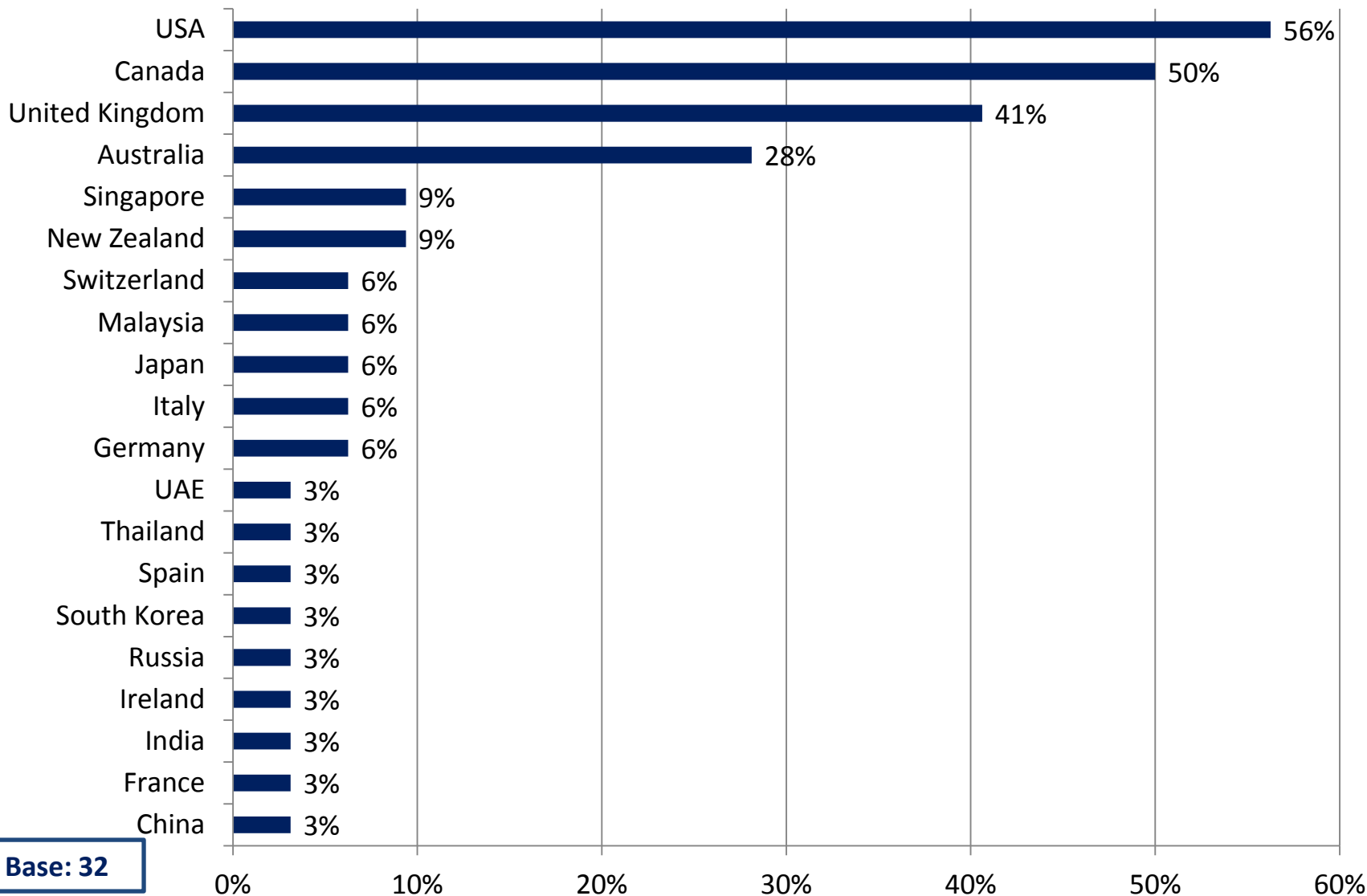
Study Visa



Base: 110

In which countries did you experience these concerns/difficulties?

Work Visa

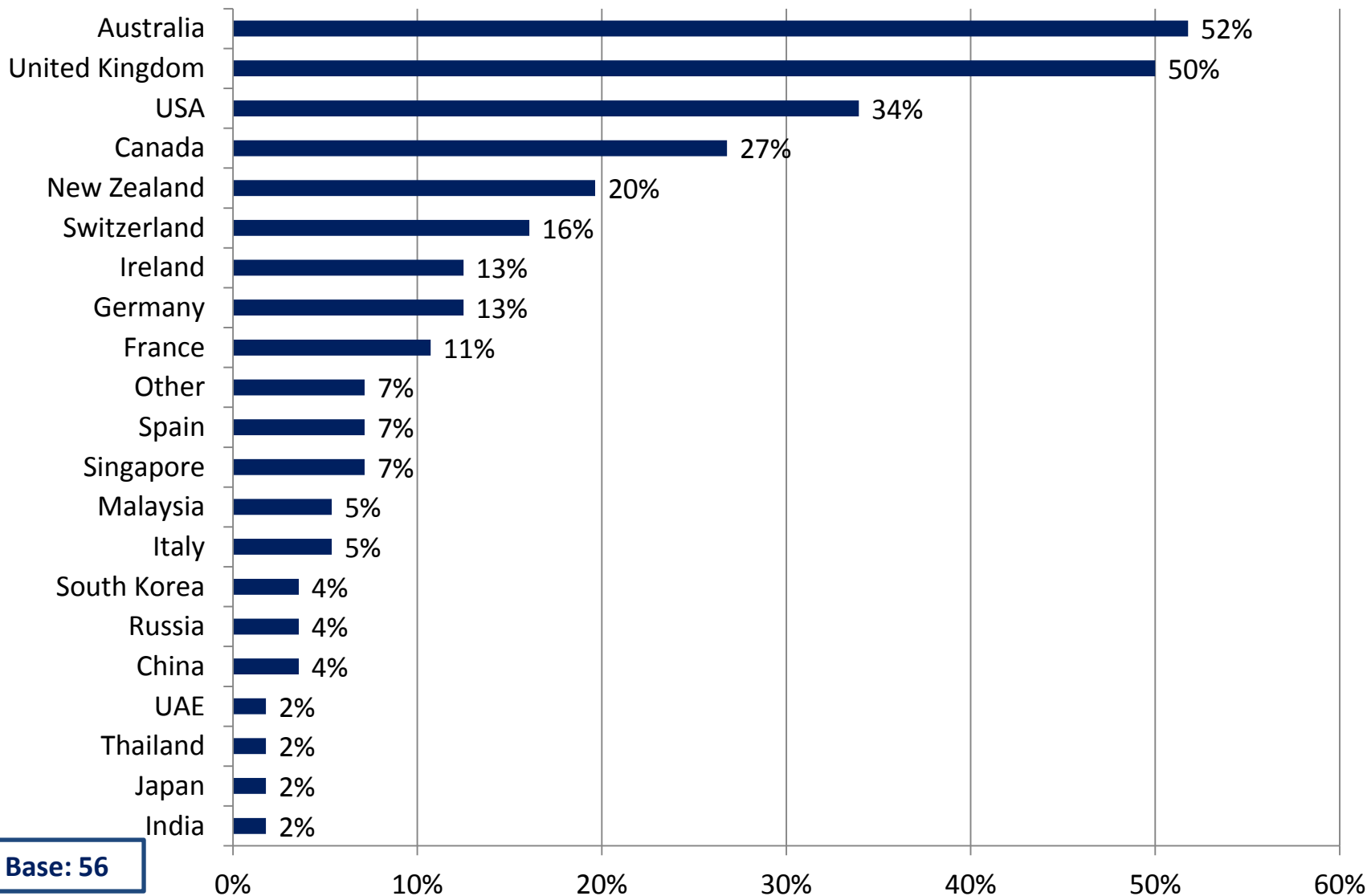


Base: 32

Note very small base number

In which countries did you experience these concerns/difficulties?

Financial

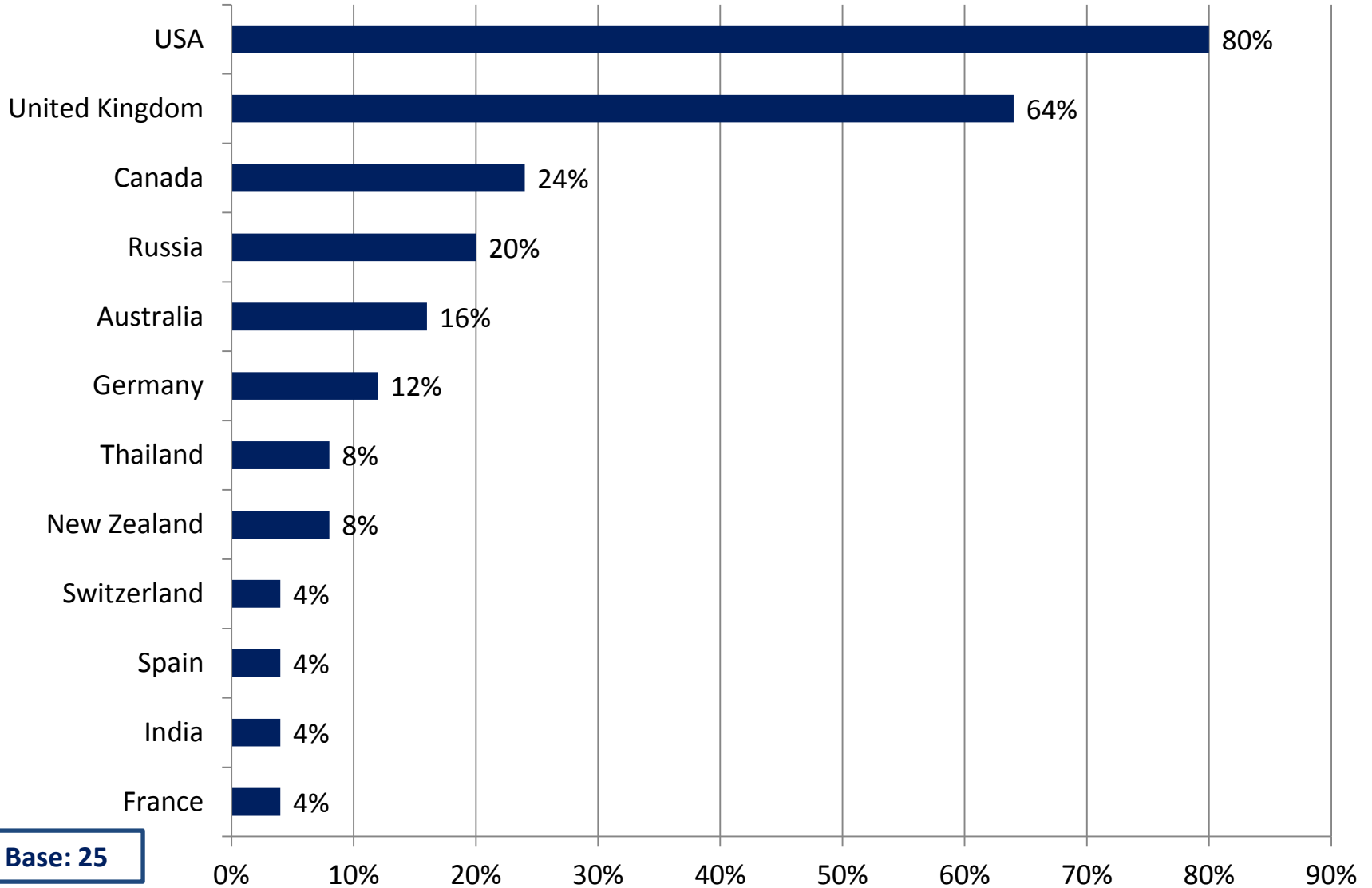


Base: 56

Note very small base number

In which countries did you experience these concerns/difficulties?

Global Political Situation

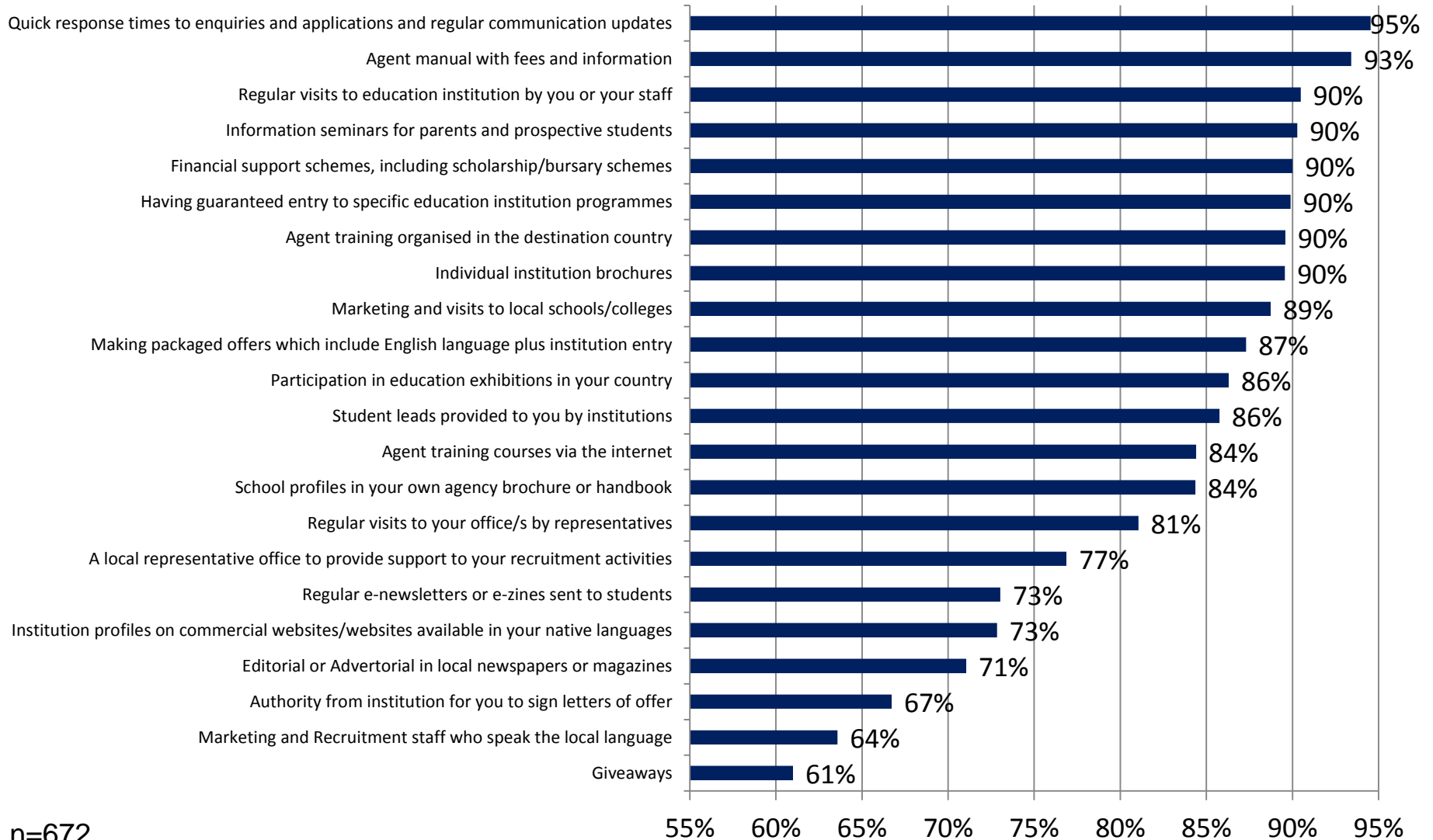


Base: 25

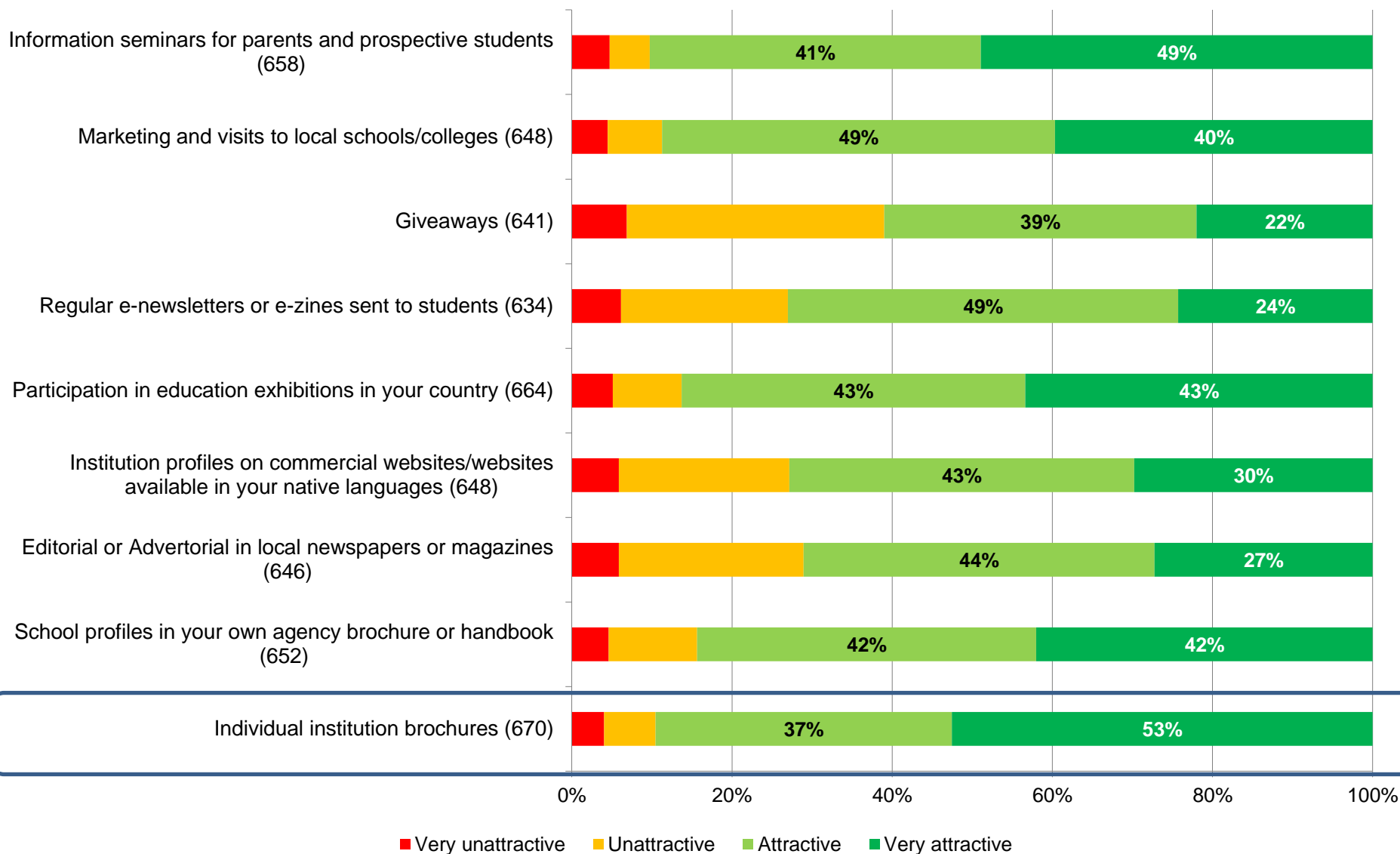
Note very small base number

Marketing

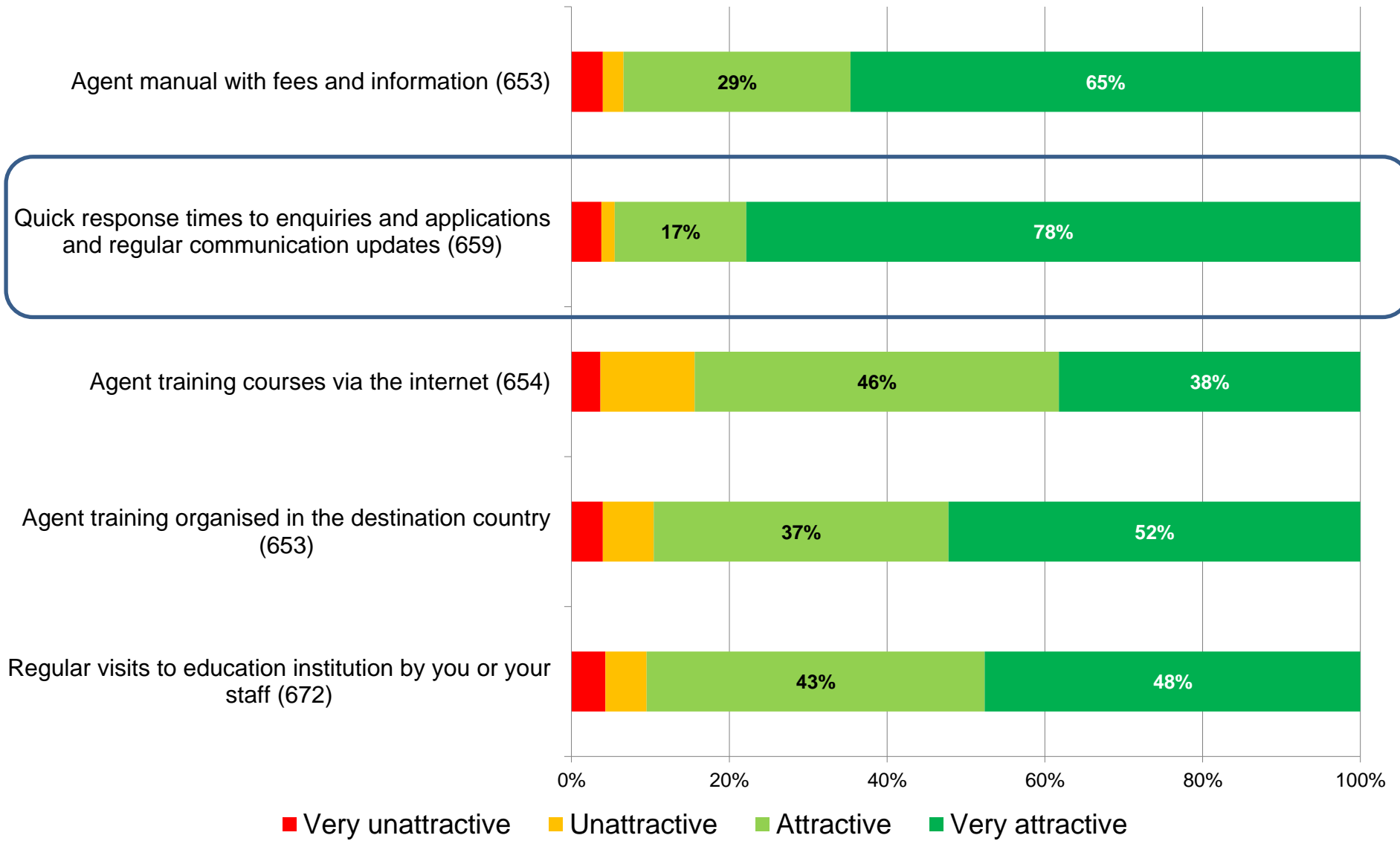




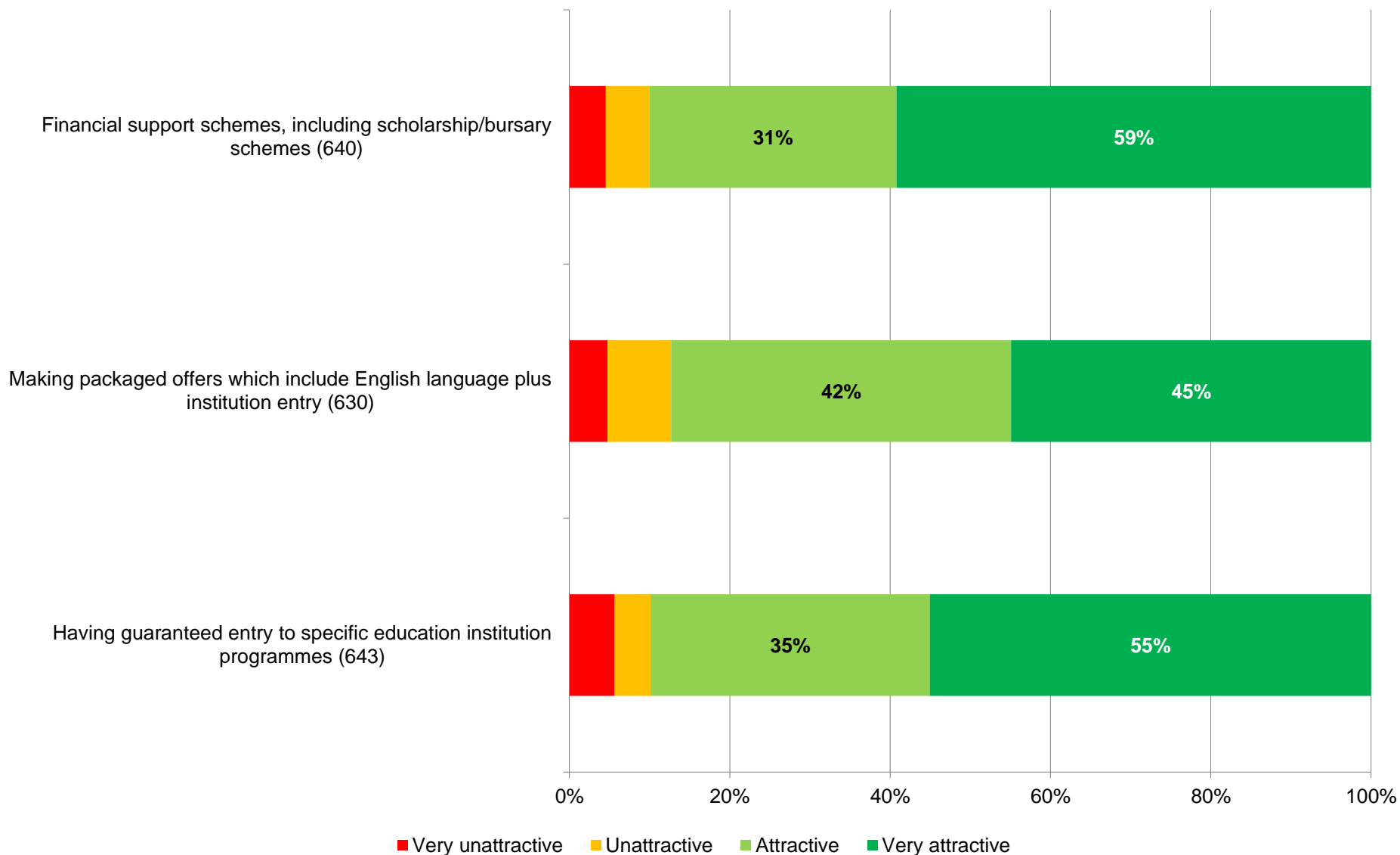
Promotional materials and campaigns



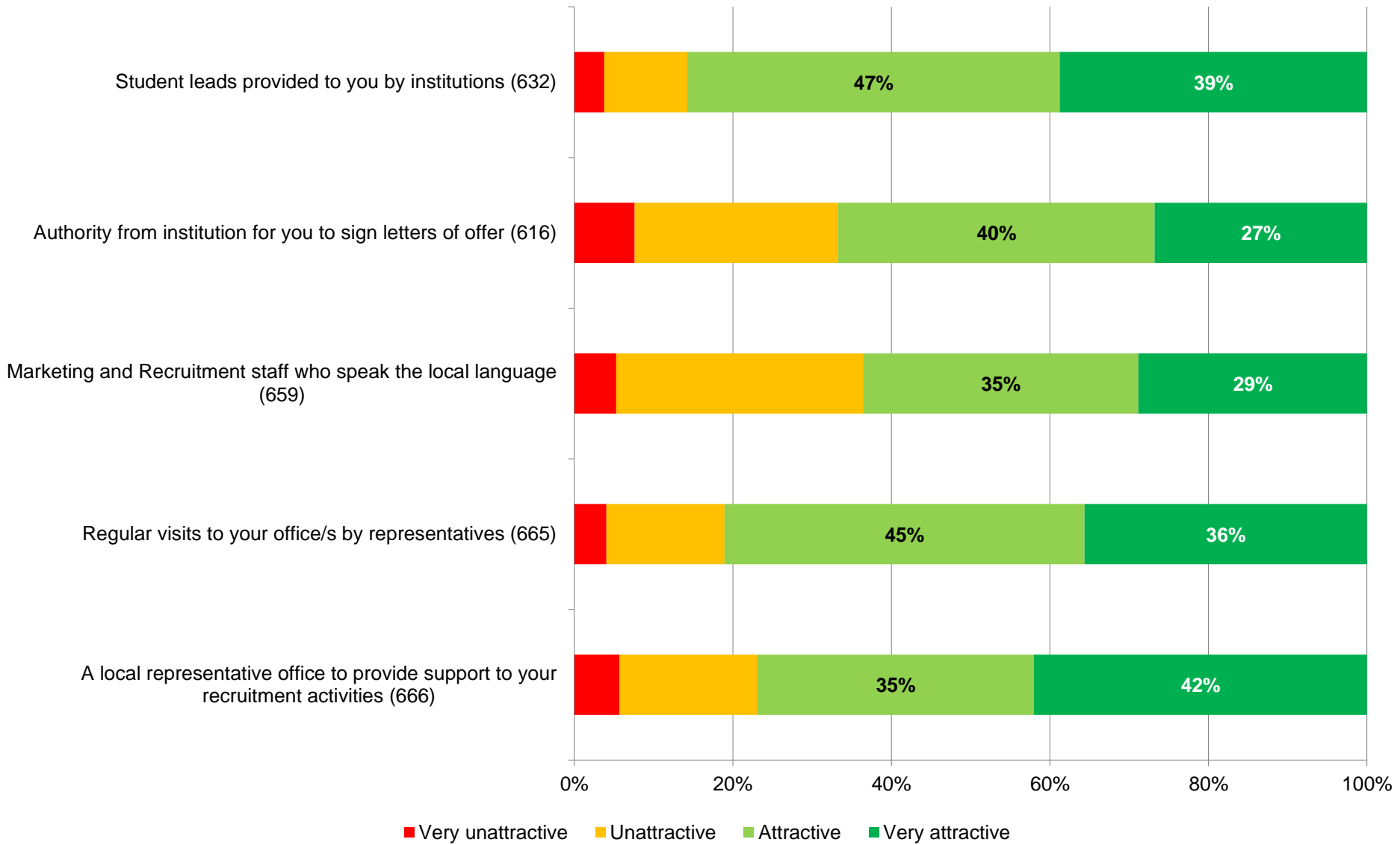
Services



Packages and offers

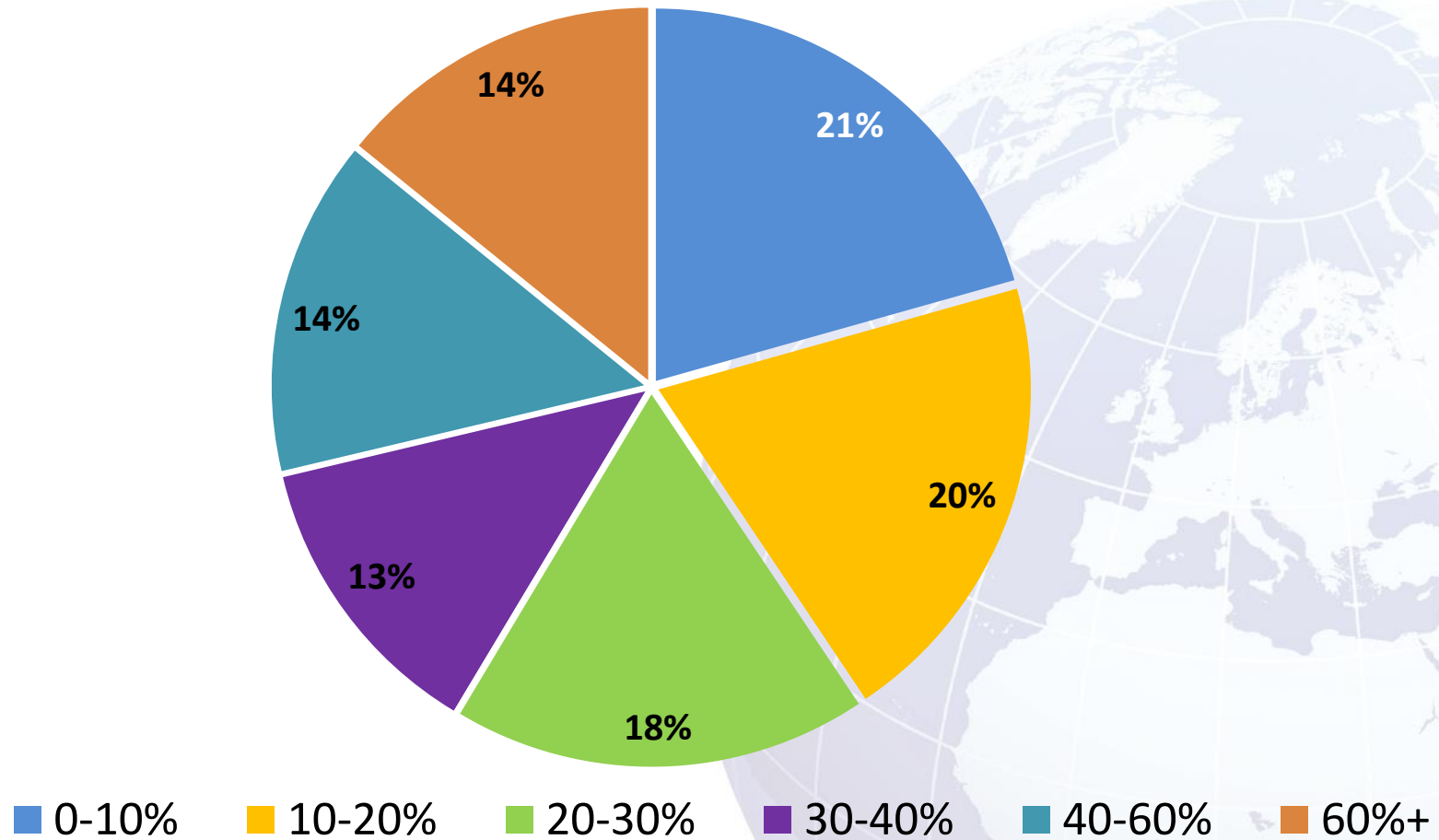


People and Staff

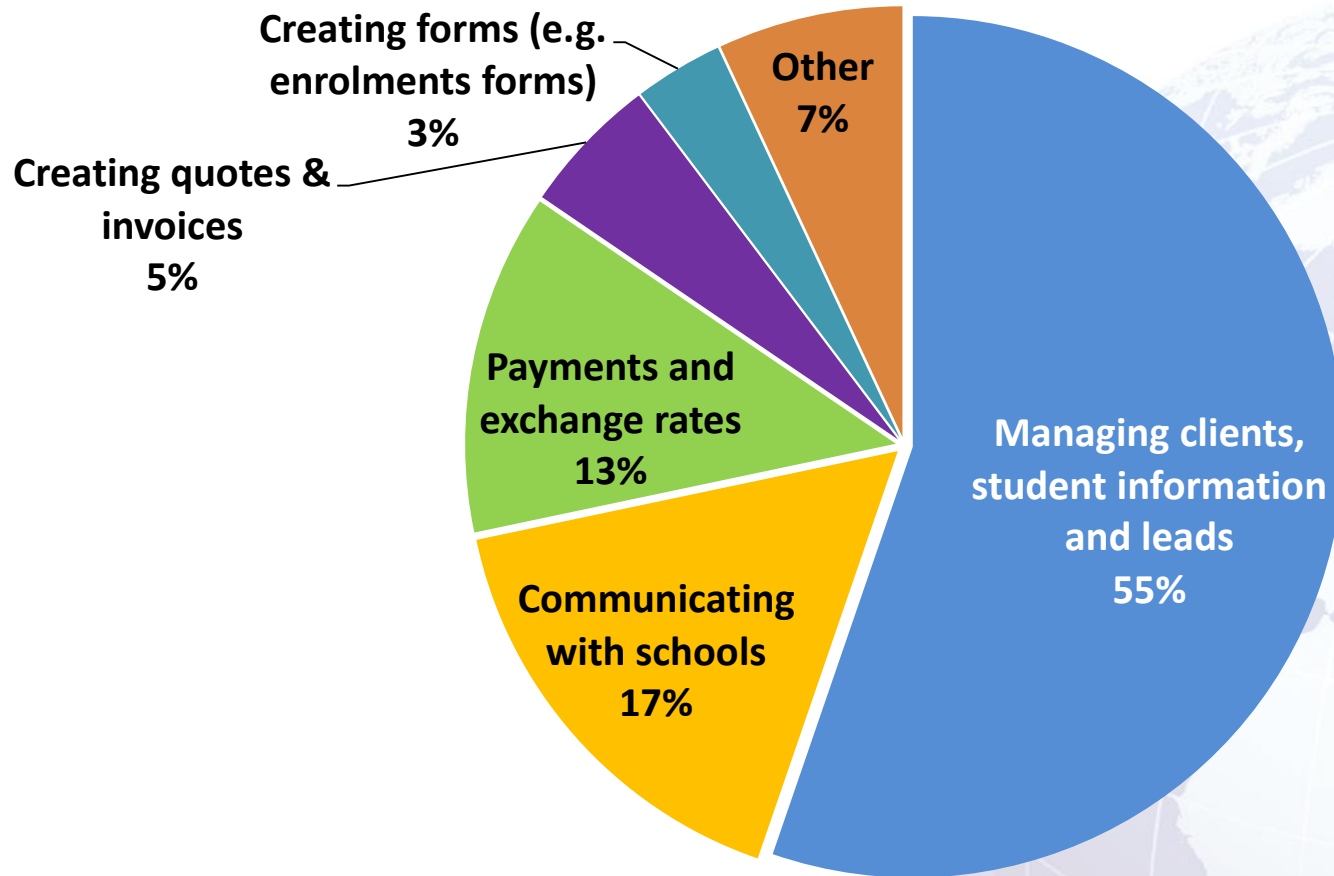




What percentage of your leads come from an online source (website, social media)?



What is your biggest operational challenge?



Thank you!

Please leave your card for a copy of
these slides

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