

EFFECTIVE MARKETING TECHNIQUES AND SECRET MARKETS

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LANGUAGES CANADA ANNUAL CONFERENCE
1 – 4 MARCH 2015

INTRODUCTION

OUR PARTNERS

DESTINATIONS



ASSOCIATIONS

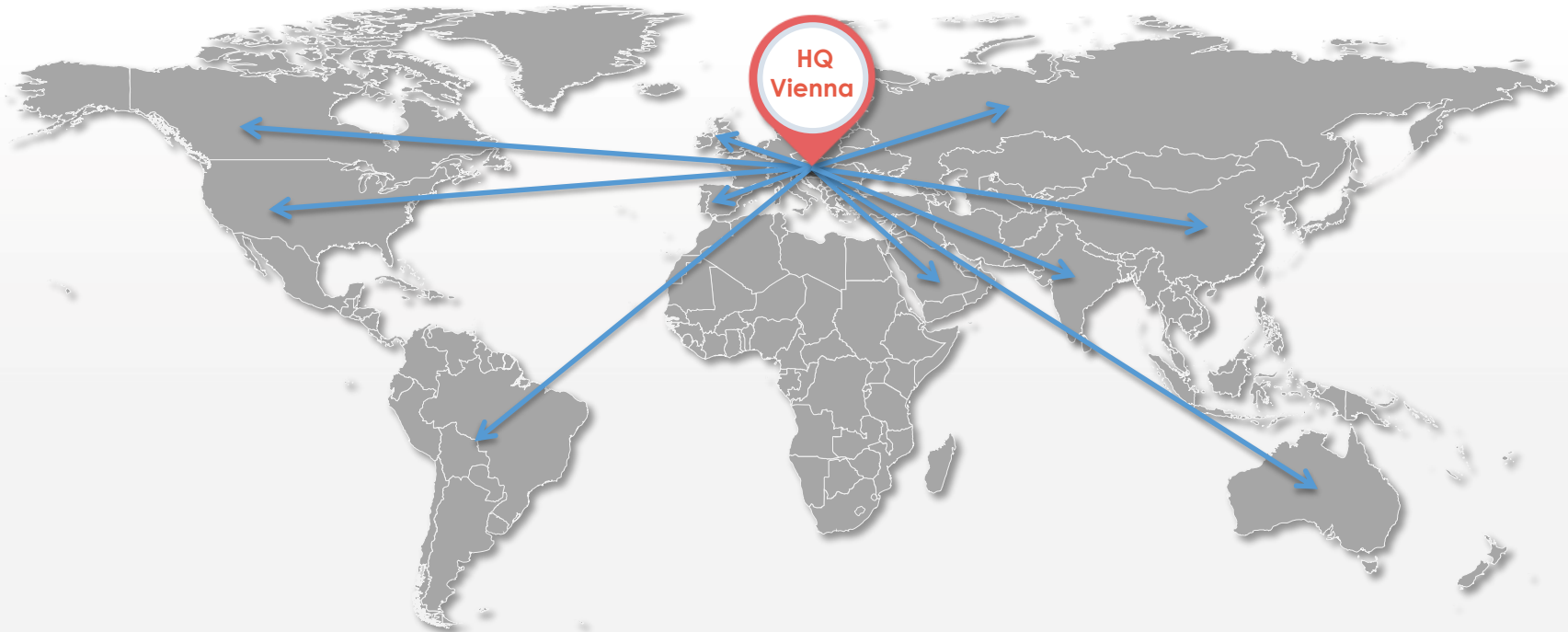


PROVIDERS



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



GLOBAL ELT MARKET

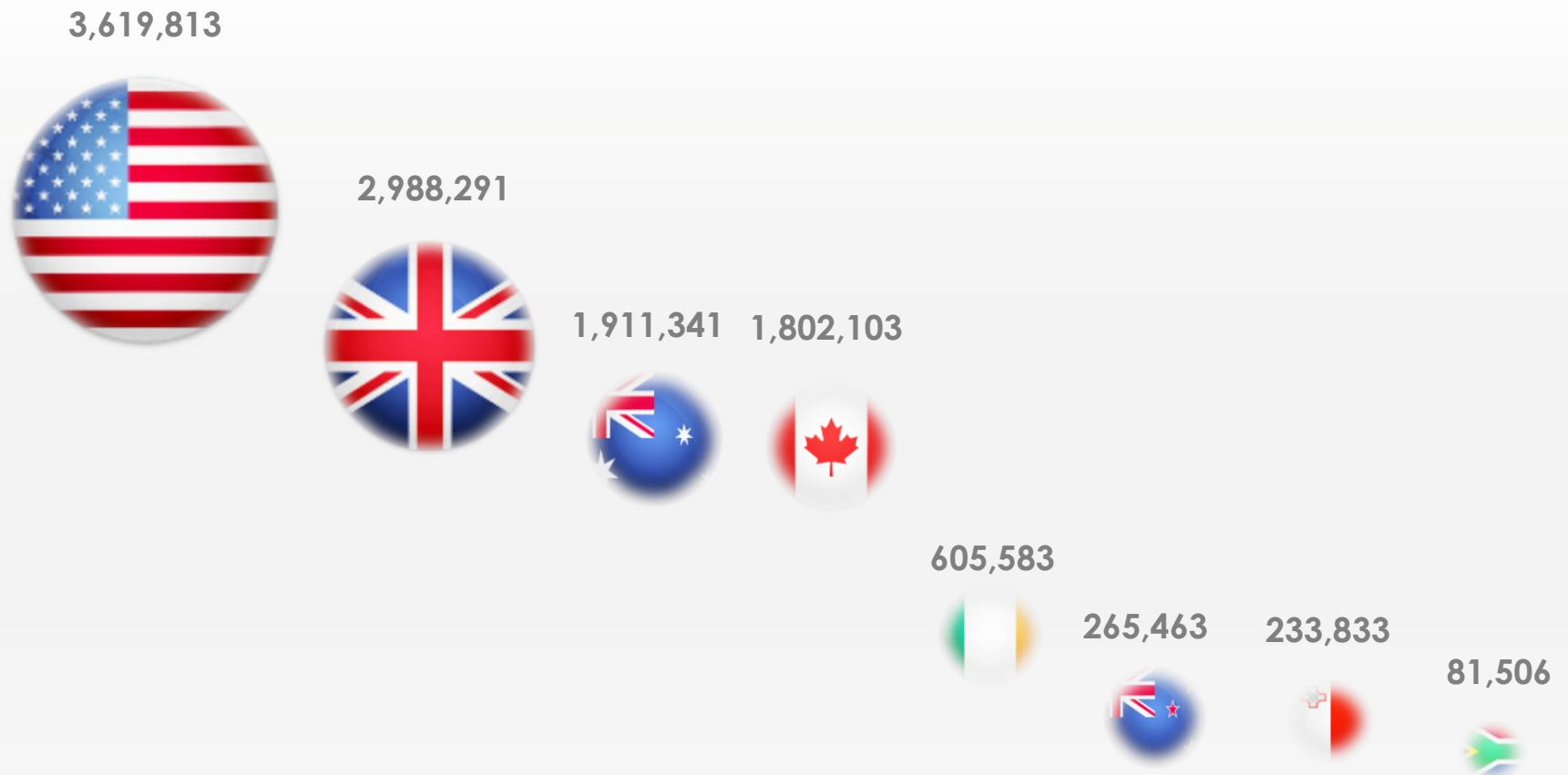
INDUSTRY OVERVIEW

- **ELT** – ENGLISH LEARNING OUTSIDE HOME COUNTRY
- **1.3** MILLION INTERNATIONAL ELT STUDENTS
- **11.5** MILLION STUDENT WEEKS SPENT ABROAD
- **US\$11.5** BILLION MARKET VALUE
- **2,400** CENTRES, **16,000** AGENTS
- **52** ASSOCIATIONS, **8** MEDIA, **34** WORKSHOPS, **1,000+** FAIRS



GLOBAL ELT MARKET

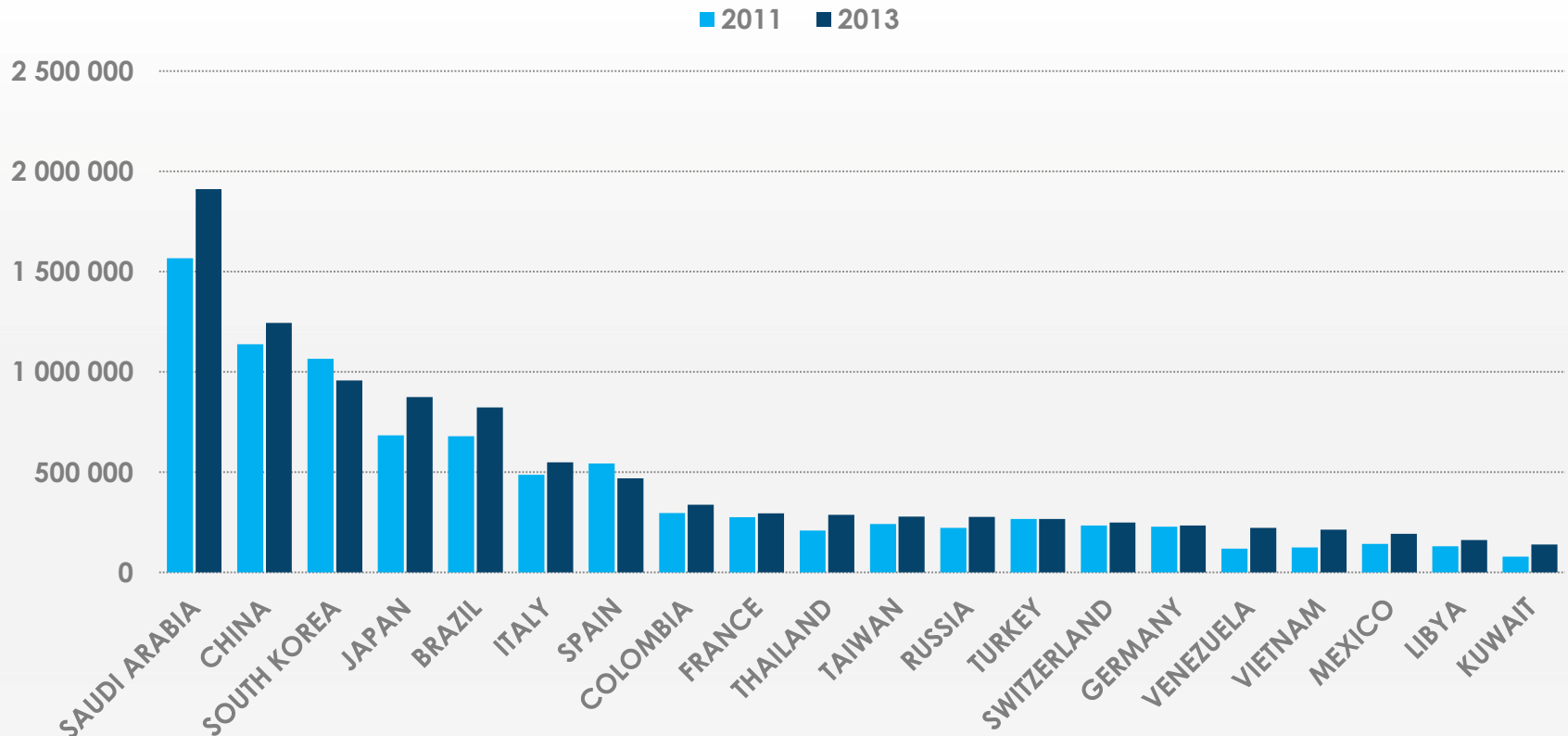
DESTINATIONS (STUDENT WEEKS, 2013)



Source: StudentMarketing, 2015

GLOBAL ELT MARKET

TOP SOURCE MARKETS – 2013 VS 2012 PERFORMANCE (STUDENT WEEKS)

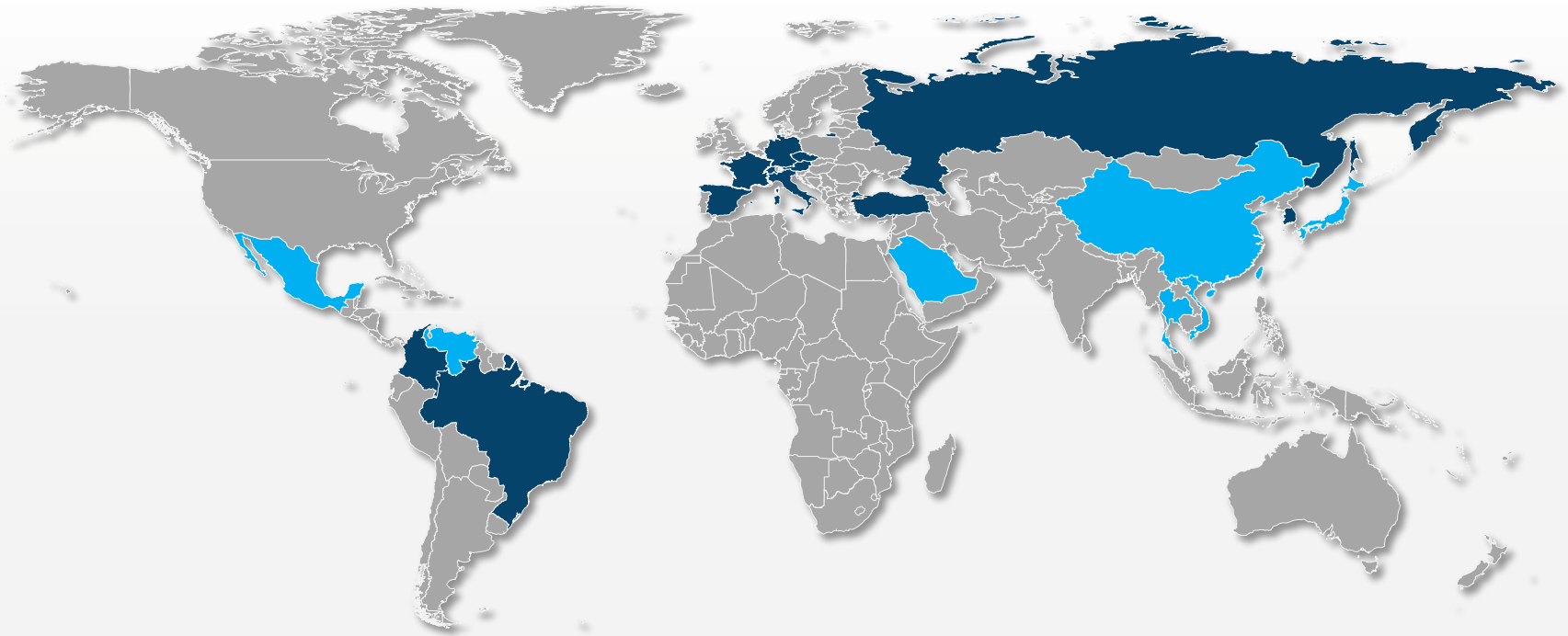


Source: StudentMarketing, 2015

GLOBAL ELT MARKET

TOP SOURCE MARKETS – 2014 PERFORMANCE ESTIMATE (STUDENT NUMBERS)

7

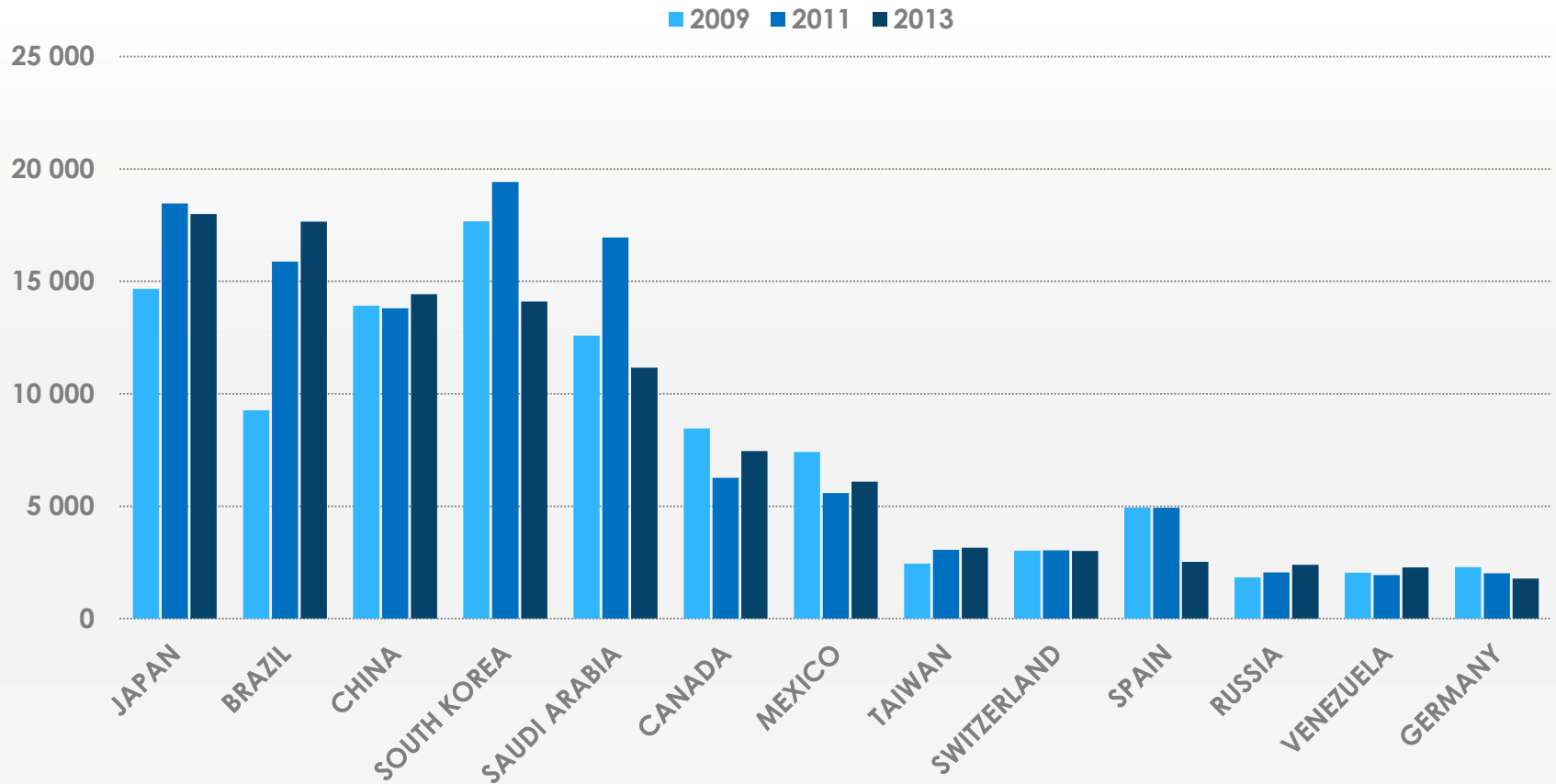


■ INCREASE ■ DECREASE

Source: StudentMarketing, 2015

GLOBAL ELT MARKET

TOP SOURCE MARKETS FOR CANADA (STUDENT NUMBERS)

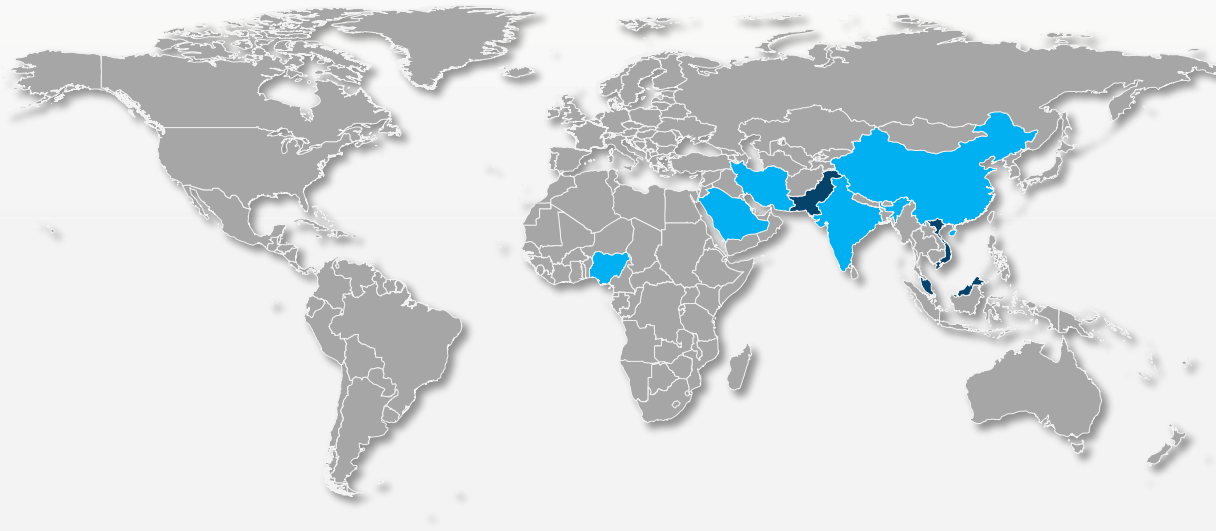


Source: Languages Canada, 2014

SOURCE MARKET OVERVIEW

MARKETS OF THE FUTURE FOR HIGHER EDUCATION FOR CANADA

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TIER 1

CHINA

SAUDI ARABIA

INDIA

IRAN

NIGERIA

TIER 2

PAKISTAN

MALAYSIA

VIETNAM

Source: CIC, 2 013; StudentMarketing, 2014



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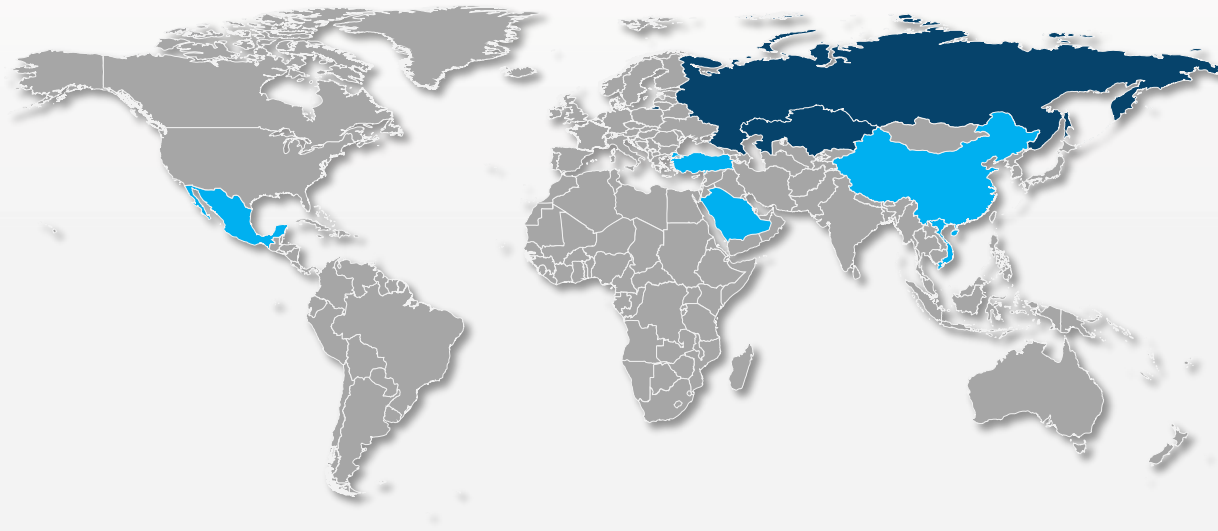


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SOURCE MARKET OVERVIEW

TOP MARKETS FOR PATHWAY PROGRAMS

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TIER 1

CHINA
SAUDI ARABIA
VIETNAM
TURKEY
MEXICO

TIER 2

KAZAKHSTAN
RUSSIA

Source: StudentMarketing, 2014



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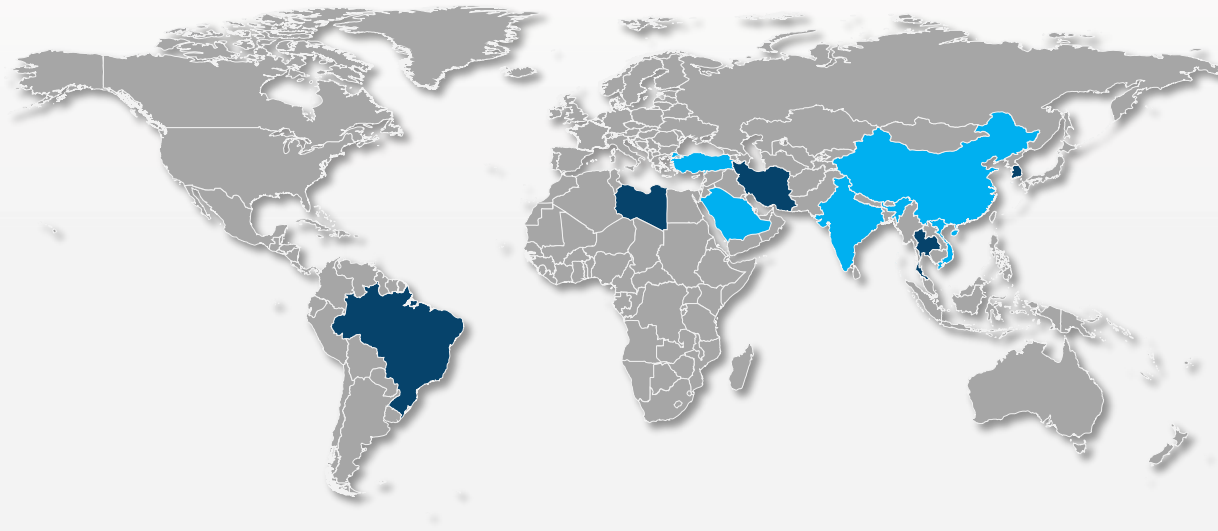


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SOURCE MARKET OVERVIEW

TOP MARKETS FOR AGENT MARKETING

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TIER 1

CHINA
VIETNAM
INDIA
TURKEY
SAUDI ARABIA

TIER 2

LIBYA
IRAN
THAILAND
SOUTH KOREA
BRAZIL

Source: StudentMarketing, 2014



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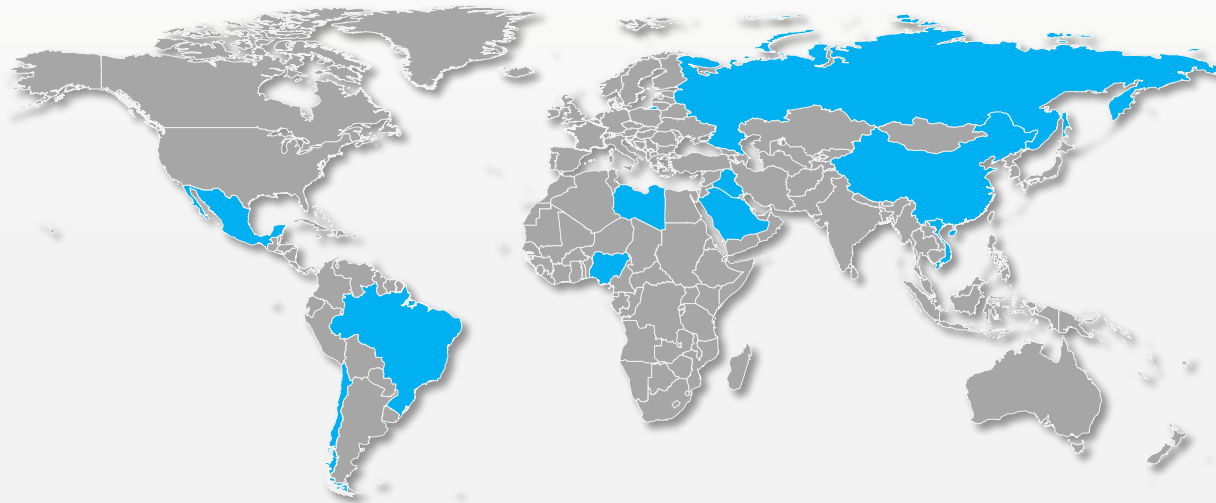


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SOURCE MARKET OVERVIEW

TOP MARKETS OFFERING SCHOLARSHIPS

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SAUDI ARABIA

BRAZIL

LIBYA

CHINA

CHILE

IRAQ

MEXICO

RUSSIA

VIETNAM

NIGERIA

Source: StudentMarketing, 2014



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MARKET PROFILES

CHINA



1,137,158 student weeks spent abroad (2nd worldwide)

USA, Australia, Canada, UK, New Zealand



452 licensed education agents

1 agent association (BOSSA)

MARKET SPECIFICS

- Important to develop **guanxi**
- **Parents** are in the role of decision-makers
- **Government** involvement
- Market becomes rewarding in a **long-term run**
- Having **materials in Chinese** is a must
- **Different** tools and social media (Baidu, Qzone, Ren ren)
- Importance of **rankings**



Source: StudentMarketing, 2014



MARKET PROFILES

BRAZIL



823,225 student weeks spent abroad (5th worldwide)

Canada, Australia, USA, UK, Ireland



500 education agents

1 agent association (BELTA)

MARKET SPECIFICS

- Most of the students are aged **18 - 30**
- Approx. **2 million** English learners in domestic private schools
- Robust "**Science Without Borders**" scholarship scheme in place
- Brazilians typically deal in **net prices**
- Important to establish **rapport** before trying to begin business discussions
- Under the Brazilian law, it is mandatory to have catalogues, brochures and any promotional material available in **Brazilian Portuguese**



Source: StudentMarketing, 2014



MARKET PROFILES

THAILAND



15.7 million young people



287,324 student weeks spent abroad (10th worldwide)

Australia, UK, USA, Canada, New Zealand



26,233 higher education students abroad



150 education agents

1 agent association (TIECA)



Source: UNESCO Institute for Statistics, 2013; StudentMarketing, 2014



MARKET PROFILES

TURKEY



266,811 student weeks spent abroad (13th worldwide)

UK, USA, Malta, Canada, Ireland



240 education agents

4 agent associations (UED, TEAG, YEDAB, YEDAD)

MARKET SPECIFICS

- **Unregulated** market
- **Lack of capacity** at domestic universities
- Opportunities in **graduate** and **dual degree** programmes
- Need for **ESL preparation**
- Price sensitive source country – importance of **special offers**
- Importance of **word-of-mouth** recommendations
- Strategy is to work with **2-3 key players** and several smaller agents



Source: StudentMarketing, 2014



MARKET PROFILES

VIETNAM

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213,762 student weeks spent abroad (17th worldwide)

Australia, USA, Canada, New Zealand, UK



120 education agents

1 agent association (VIECA)

MARKET SPECIFICS

- **Rapidly growing** middle class
- **Low quality** of local education provision
- Growing demand for **skilled workers** and **technicians**
- **Differences** in student preferences in Ho Chi Minh City and Hanoi
- Web presence in **Vietnamese** very important
- **'Trust but verify'** approach
- New **rules and regulations** (mandatory training, certification, government license, etc.)



Source: StudentMarketing, 2014



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MARKET PROFILES

MEXICO



192,111 student weeks spent abroad (18th worldwide)

Canada, USA, UK, Ireland, Australia



90 education agents

1 agent association (AMTE)

MARKET SPECIFICS

- Signs that the market is **picking up** again
- However, Canada is **not benefiting** from this trend
- For Mexican students, **safety** is a factor of great importance
- When doing business with Mexicans, make sure to ask and talk about **family-related topics**
- Most agencies organise/are involved in **student fairs** - this is a shortcut to close business partnerships with agents in Mexico
- **Logistics issues** (e.g. don't use metro, allow sufficient lead time when going to a meeting)



Source: StudentMarketing, 2014



MARKET PROFILES

ECUADOR

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19



4 million young people



48,316 student weeks spent abroad (26th worldwide)

USA, Canada, UK, Australia, New Zealand



9,813 higher education students abroad



35 education agents

1 agent association (COICEC)



Source: UN Population Division, 2013; UNESCO Institute for Statistics, 2014; StudentMarketing, 2014



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MARKET PROFILES

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20



8.1 million young people



27,127 student weeks spent abroad (38th worldwide)

USA, Australia, UK, Canada, Ireland



14,844 higher education students abroad



55 education agents

1 agent association (EDAPE)



Source: UN Population Division, 2013; UNESCO Institute for Statistics, 2014; StudentMarketing, 2014



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THANK YOU!

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