

# CANADA

## AS A STUDY DESTINATION - PAST, PRESENT AND FUTURE



SAMUEL VETRAK  
STUDENTMARKETING, CEO

**studentmarketing**  
YOUTH TRAVEL CONSULTANCY



LANGUAGES CANADA ANNUAL CONFERENCE  
FEBRUARY 28, 2017

# 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



SOCCER  
SCHOOLS



UNIVERSITY OF  
TORONTO

# INTERNATIONAL STUDENTS IN NUMBERS

Higher education

4,500,000



Language travel

2,280,000



K-12

400,000



5% p.a.



3% p.a.



10% p.a. \*



US\$100 bn p.a.



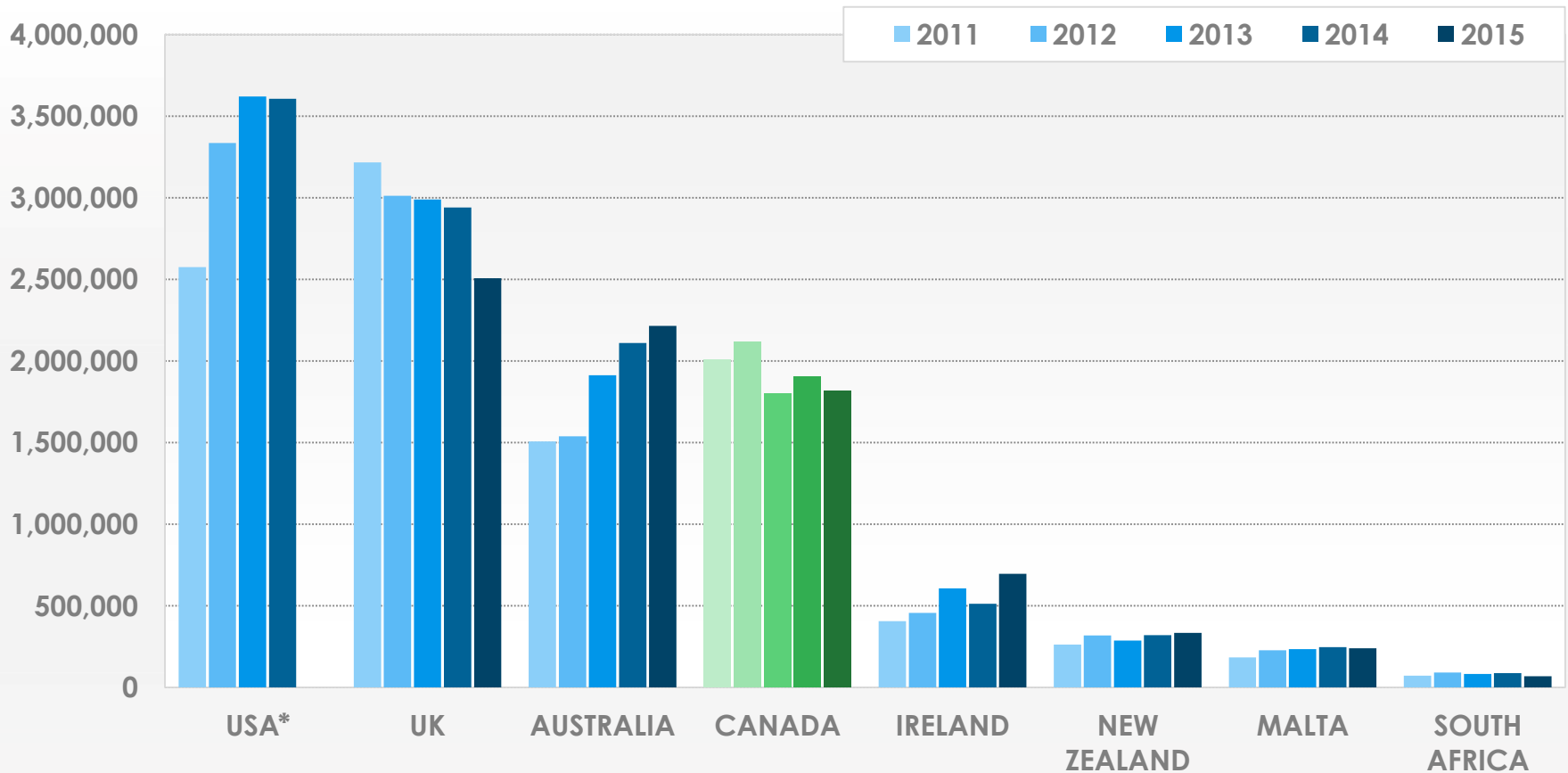
US\$13 bn p.a.

**Source:** Project Atlas, 2016; IALC & StudentMarketing, 2016; \* data covers the UK, Canada, Australia and New Zealand



# ENGLISH LANGUAGE TRAVEL

## TOP DESTINATIONS (STUDENT WEEKS)

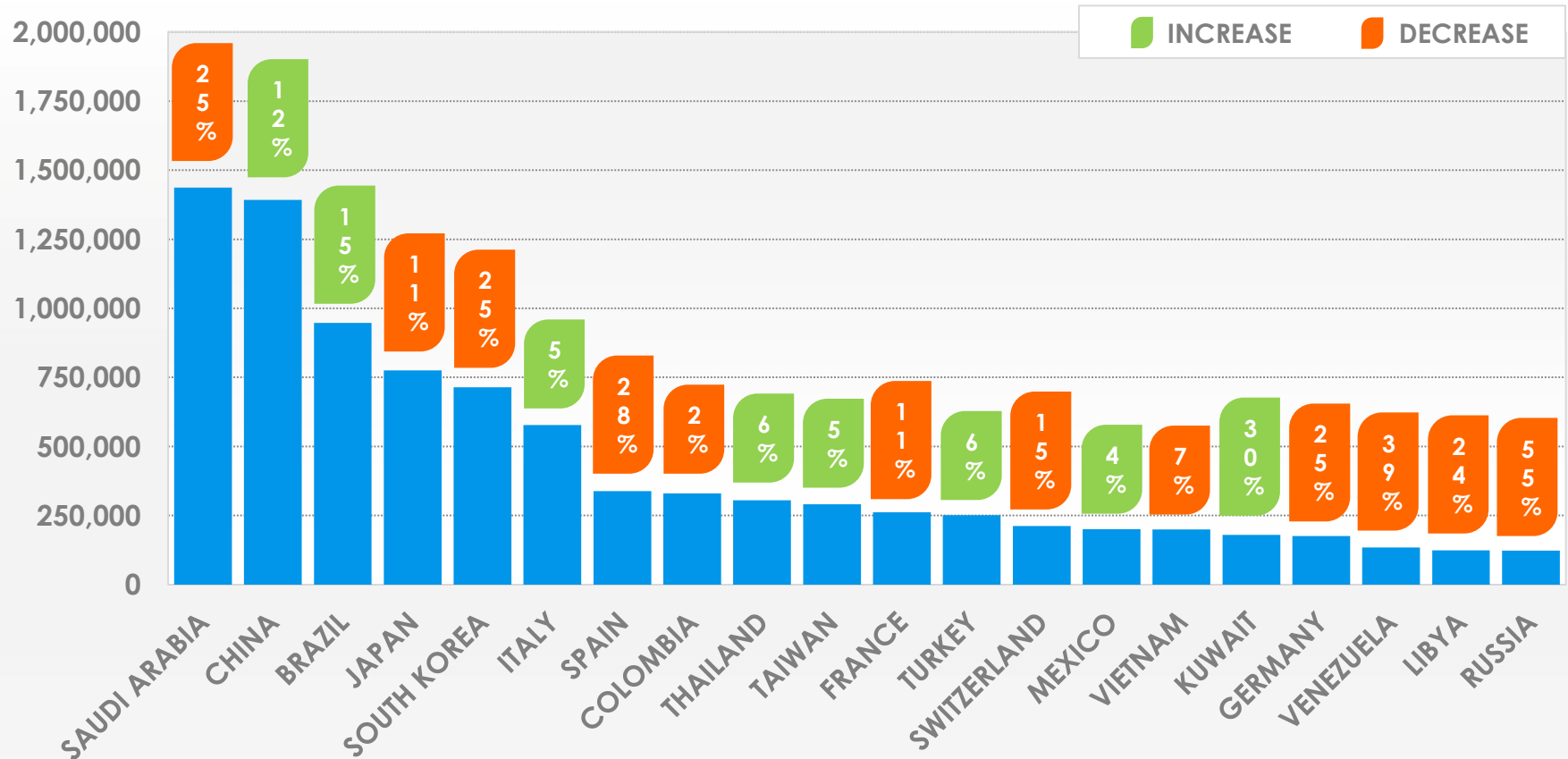


\* 2015 data is not available.

Source: StudentMarketing, 2016

# ENGLISH LANGUAGE TRAVEL

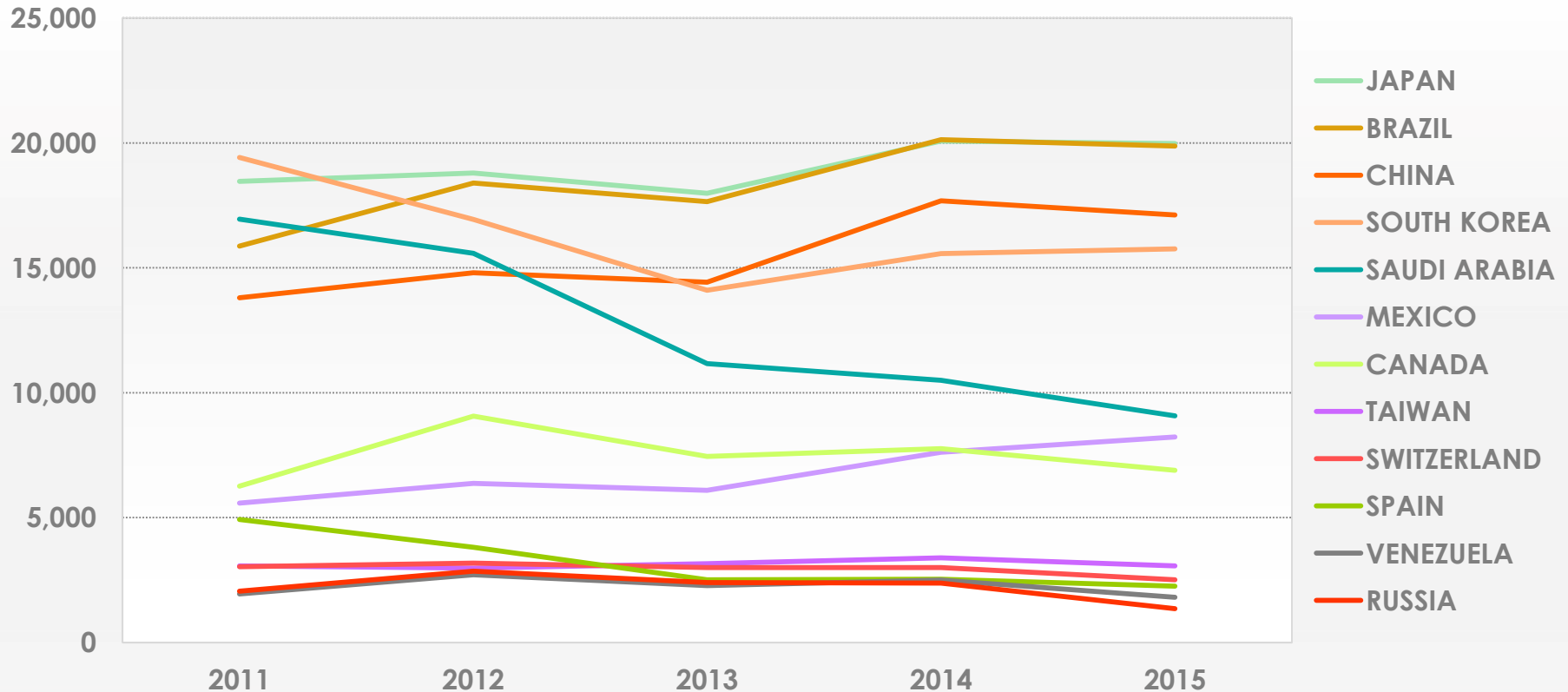
## TOP SOURCE MARKETS AND 2013 V 2015 CHANGE (STUDENT WEEKS)



Source: StudentMarketing, 2016

# ENGLISH LANGUAGE TRAVEL

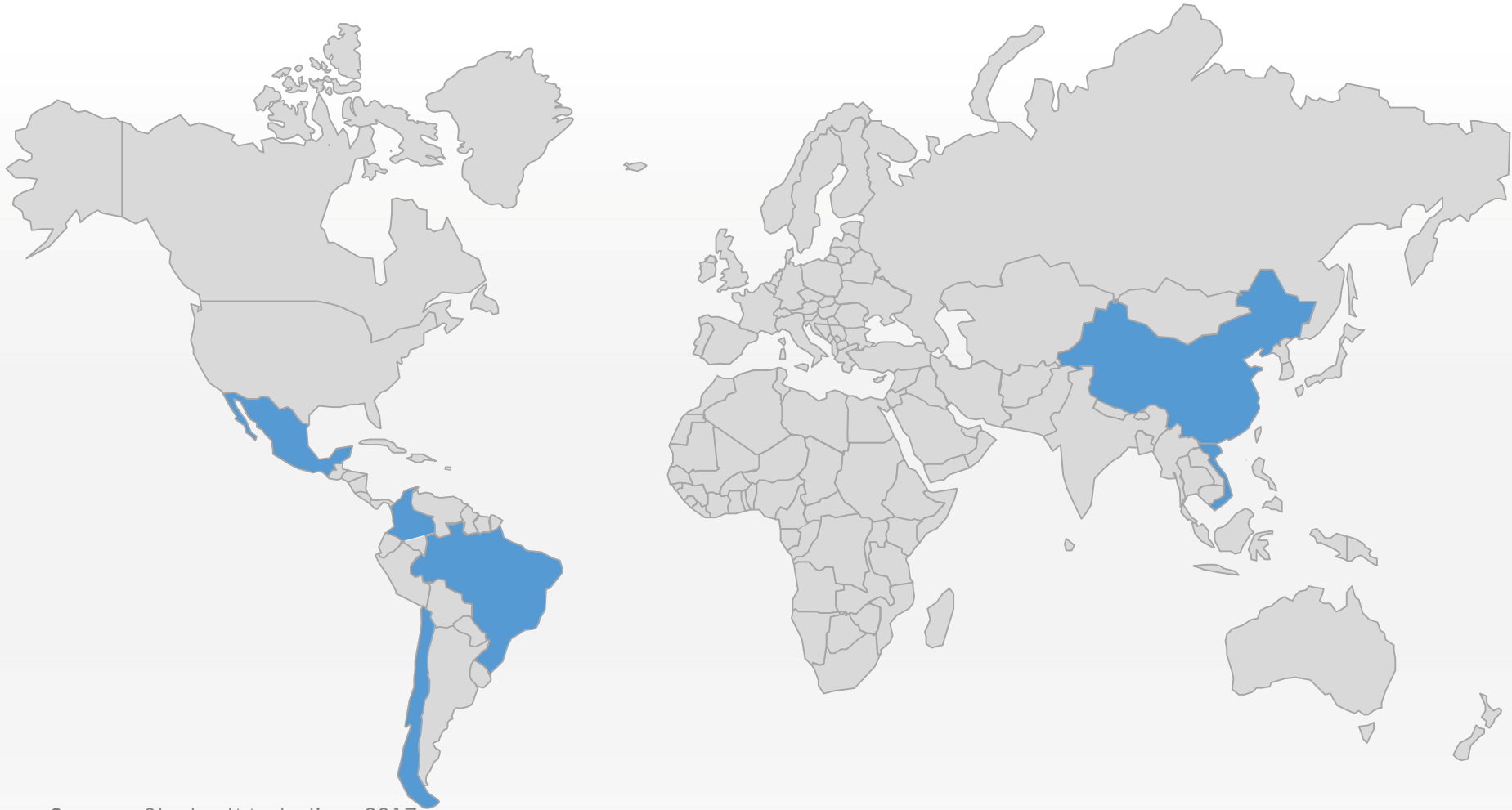
## TOP SOURCE MARKETS FOR CANADA (STUDENT NUMBERS)



Source: Languages Canada, 2016

# CANADA

MARKETS OF THE FUTURE



Source: StudentMarketing, 2017



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# ENGLISH LANGUAGE TRAVEL

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TOP SOURCE MARKETS GLOBALLY AND CANADA'S MARKET SHARE (STUDENT WEEKS, 2015) 9



Source: StudentMarketing, 2016

# PRICE

## CURRENCY RATE FLUCTUATIONS (2012-TO DATE)

BENCHMARK: US DOLLAR



EUR 0.9329



GBP 0.7974



CAD 1.3161

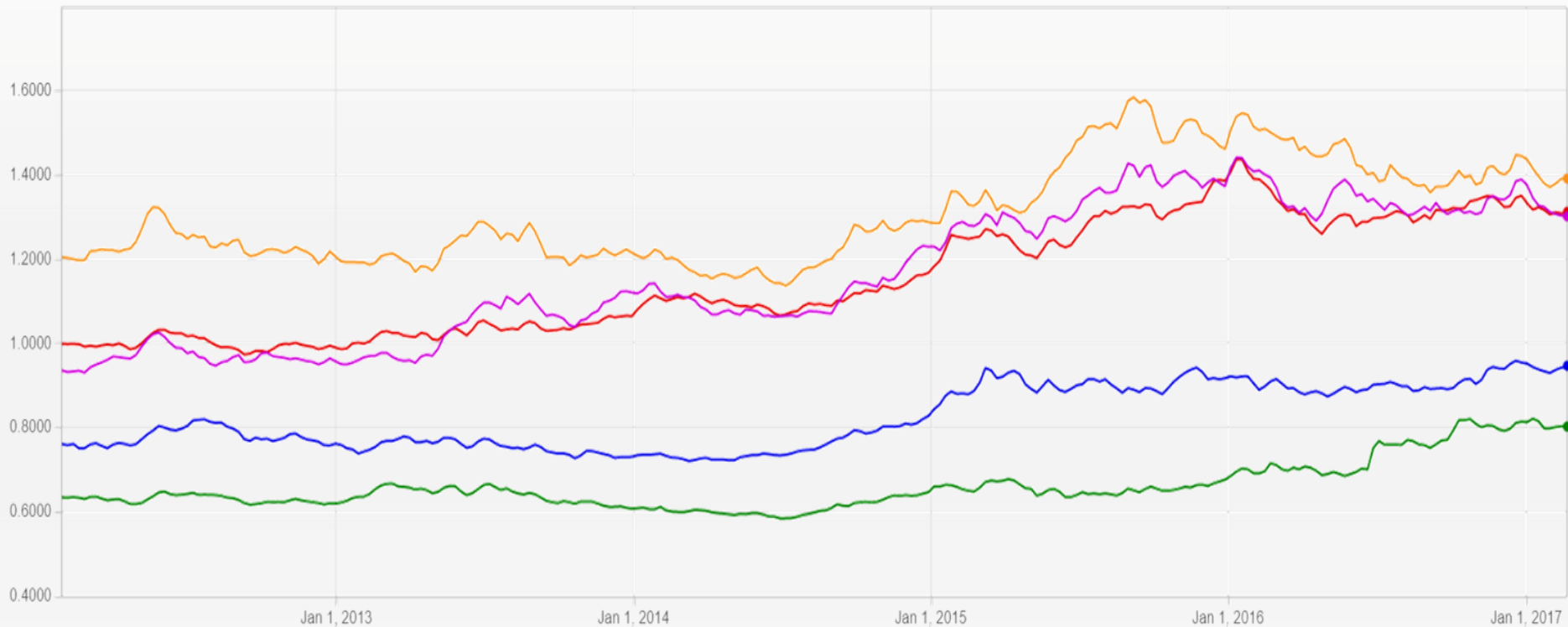


AUD 1.3232



NZD 1.3791

BID DAILY RATES – MONDAY, JAN 23, 2016



Source: OANDA, 2017



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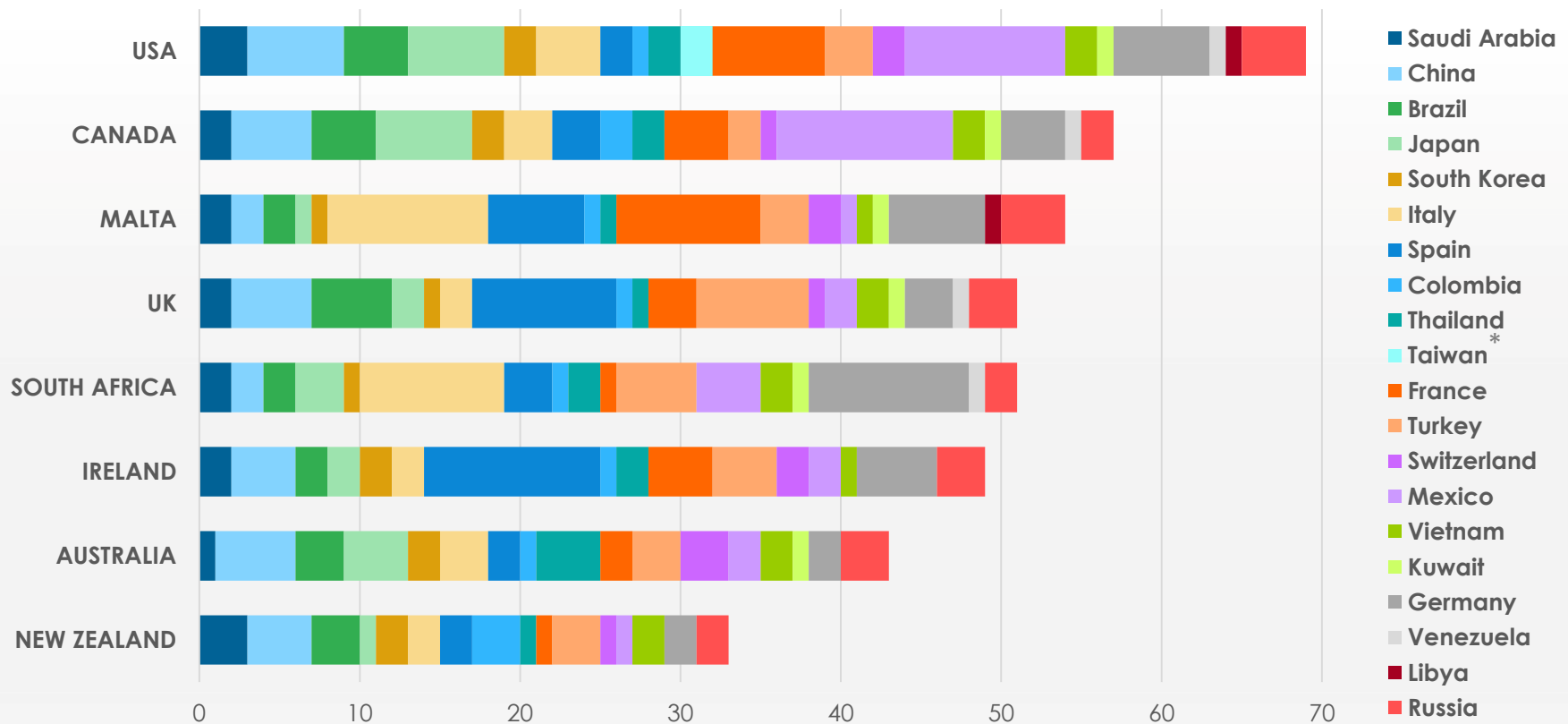
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# IN-COUNTRY REPRESENTATION

## NUMBER OF EMBASSIES AND CONSULATES IN TOP SOURCE MARKETS



\*1 American Institute in Taiwan offering visa services in the USA only

Source: USEmbassy.gov, 2017; Department of Foreign Affairs, Republic of South Africa, 2017; Department of Foreign Affairs and Trade, Australia, 2017; Ministry of Foreign Affairs and Trade, New Zealand, 2017; GOV.UK, 2017; Refugees and Citizenship Canada (IRCC), 2017; Government of Malta 2016; Department of Foreign Affairs and Trade, 2017

# REGULATIONS

## RIGHT TO WORK WHILE STUDYING COMPARISON BY DESTINATION AND VISA TYPE

Destination	Visa type for language learners	Right to work (YES/NO)
AUSTRALIA	ELICOS sector (subclass 570) visa	YES
	Tourist (Subclass 676) stream visa	NO
	Sponsored Family Visitor (Subclass 679) stream visa	NO
	Visitor (Subclass 600) Tourist, Sponsored Family and Business Visitor stream visa	NO
CANADA	Electronic Travel Authorization (eTA) to board flight to Canada (in exception with visa-exempt countries)	n/a
	Study permit	YES
	Visitor visa	NO
IRELAND	Long stay 'D' visa single entry (student visa)	YES
	Short stay 'C' visa (visitor visa)	NO
	No visa for EU nationals	YES
MALTA	Long stay 'D' visa single entry (student visa)	YES
	Short stay 'C' visa (visitor visa)	NO
	No visa for EU nationals	YES
NEW ZEALAND	Visitor visa	NO
	Student visa	YES
SOUTH AFRICA	Study visa	YES
	Visitor visa	NO
	No visa for nationals exempt from visas for South Africa staying up to 90 days	YES
UK	Standard Visitor visa	NO
	Short-term study visa (adult)	NO
	Short-term study visa (child)	NO
	Short-term study visa (adult)	NO
	Tier 4 visa	YES
	No visa for EU nationals	YES
USA	F-1 Student visa	NO
	B-2 Visitor visa (for a purpose of short recreational course, which is not for credit toward a degree or academic certificate)	NO

**Source:** New Zealand Immigration, 2017; GOV.UK, 2017; South Africa Consulate General, 2017; Bureau of Consular Affairs, U.S. Department of State, 2017; The Irish Naturalisation and Immigration Service (INIS), n.a.; Immigration, Refugees and Citizenship Canada (IRCC), 2017; Australian Government - The Department of Immigration and Border Protection, 2017; Government of Malta 2015; Department of Home Affairs, Republic of South Africa, 2017



# MARKETING ACTIVITIES

## FAM TOURS AND TRADE MISSIONS DONE BY SECTOR ASSOCIATIONS

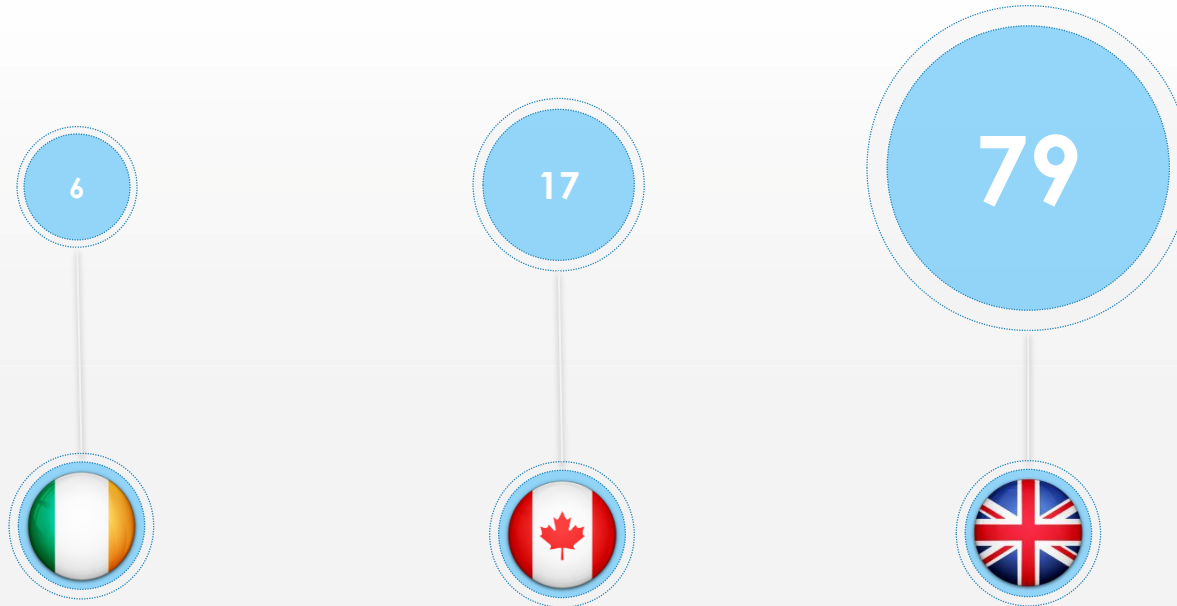
Destination	FAM Tours (2016)	Trade Missions (2016)	Agent Workshops (2016)	Total
English Australia	0	0	0	n/a
Languages Canada	0	2	0	2
MEI	0	6	1	7
FELTOM	0	0	1	1
English New Zealand	0	1	0	1
EduSA	1	0	0	1
English UK	2	6	0	8
English USA	0	0	0	0

**Source:** MEI, 2017; English UK, 2017; Languages Canada, 2017; EduSA, 2017; English New Zealand, 2017; FELTOM, 2017; English USA, 2017; English Australia, 2017



# M&A AND CLOSURES

M&A BY DESTINATION (2014-2016)



In the last 3 years, **14** language centres in Canada were subject of M&A and **5** language centres were closed.

Source: StudentMarketing, 2017



# MARKET MEASUREMENT

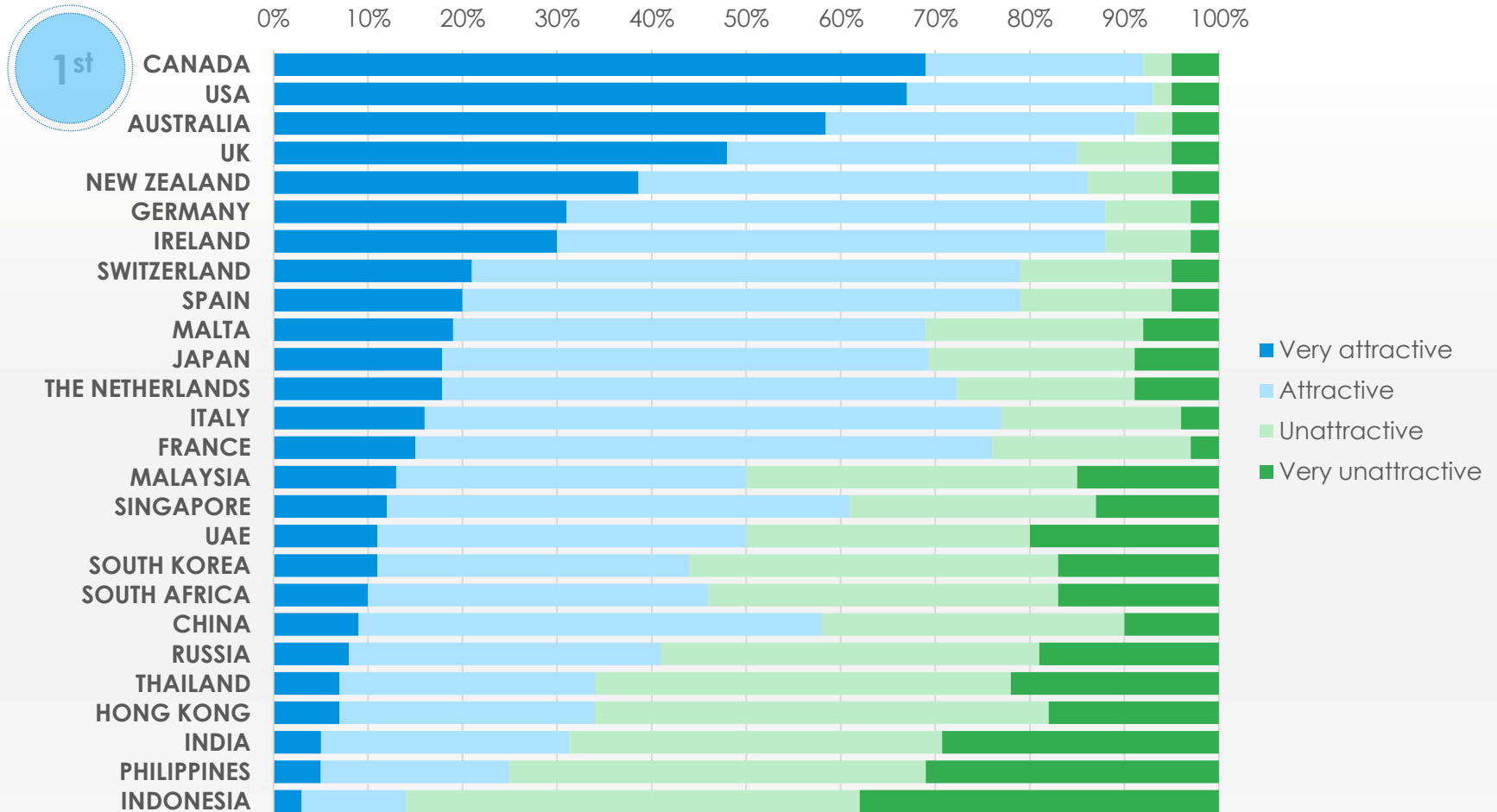
## COMPARISON OF DATA COLLECTED BY MAJOR ELT DESTINATIONS

Destination	UK	USA	Australia	Canada	Ireland	Malta	New Zealand	South Africa
Main reporting authority	English UK	IIE	English Australia	Languages Canada	MEI	NSO	MoE	EduSA
Student numbers	YES	YES	YES	YES	YES	YES	YES	YES
Student weeks	YES	YES	YES	YES	YES	YES	NO	YES
Average length of stay	YES	YES	YES	YES	YES	YES	YES	YES
Junior/Adult ratio	YES	NO	NO	YES	YES	YES	NO	NO
Specific age groups	NO	NO	NO	NO	NO	YES	NO	NO
Junior/Adult by market	YES	NO	NO	NO	YES	YES	NO	NO
Individual/Group ratio	NO	NO	YES	YES	NO	NO	NO	NO
Male/Female ratio	NO	NO	NO	NO	NO	YES	NO	NO
Arrivals by month	NO	NO	AEI	NO	NO	YES	NO	NO
Pathway data	NO	YES	YES	YES	NO	NO	NO	NO
Visa breakdown	YES	NO	YES	YES	NO	NO	NO	NO
Visa refusal	YES	NO	DIPB	YES	NO	NO	NO	NO
Programme breakdown	YES	NO	NO	YES	NO	YES	NO	NO
Accommodation breakdown	NO	NO	NO	NO	NO	YES	NO	NO
Booking sources	YES	NO	NO	YES	NO	NO	NO	NO
Number of source markets measured	114	ALL	ALL	39	ALL	Top 20 (reported)	ALL	29
Regional overview	YES	YES	YES	YES	NO	NO	YES	NO
Average tuition cost	NO	NO	YES	YES	NO	NO	NO	NO
Average accommodation cost	NO	NO	YES	YES	NO	NO	NO	NO
Future markets	NO	NO	NO	YES	NO	NO	NO	NO
Obstacles	NO	NO	NO	YES	NO	NO	NO	NO
Teaching staff	NO	NO	NO	YES	YES	YES	NO	NO
Administrative/Other staff	NO	NO	NO	YES	YES	YES	NO	NO
FT/PT Division	NO	NO	NO	YES	YES	YES	NO	NO
Peak/Off season Division	NO	NO	NO	YES	YES	NO	NO	NO
Economic impact	YES	NO	YES	YES	YES	FELTOM	NO	NO
Social impact	NO	NO	NO	NO	NO	NO	NO	NO
Quarterly data	YES	NO	AEI	NO	NO	NO	Trimester	YES
Annual data	YES	YES	YES	YES	YES	YES	YES	YES
Mandatory	NO	NO	YES	YES	NO	YES	N/A	NO
By third-party	NO	NO	YES	NO	YES	NO	NO	YES
Estimated market share	70%-80%	N/A	100%	80%	90-94%	100%	100%	50%

Source: StudentMarketing, 2017

# DESTINATION POPULARITY

OVERALL ATTRACTIVENESS OF STUDY DESTINATIONS IN 2016 ACCORDING TO AGENTS

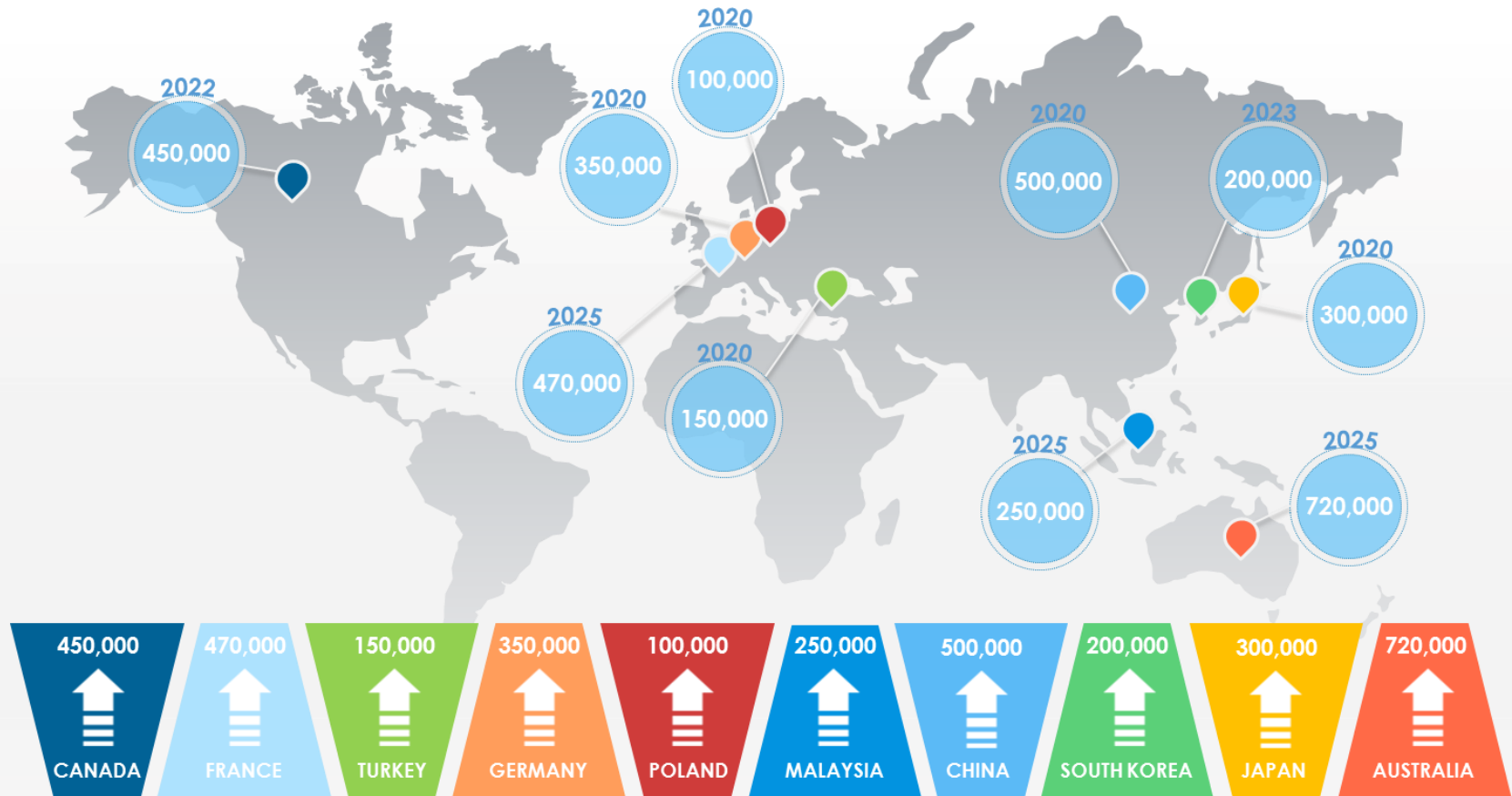


Source: ICEF i-graduate Agent Barometer, 2016



# INTERNATIONALIZATION

## INTERNATIONAL STUDENT RECRUITMENT TARGETS



**Source:** Government of Canada, 2015; Campus France, 2014; Ministry of Science and Higher Education Poland, 2015; International Relations Office Turkey, 2014; DAAD Germany, 2014; Ministry of Education China, 2011; Ministry of Education Malaysia, 2015; Ministry of Education, Republic of Korea, 2015; The Government of Japan, 2013; Australian Education International, 2017

# EMERGING DESTINATIONS

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NON-TRADITIONAL ELT DESTINATIONS COMPETING FOR INTERNATIONAL STUDENTS

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Source: StudentMarketing, 2017



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What other destinations, associations and institutions do?  
  
(and Canadian can do, too)

Source: StudentMarketing, 2017



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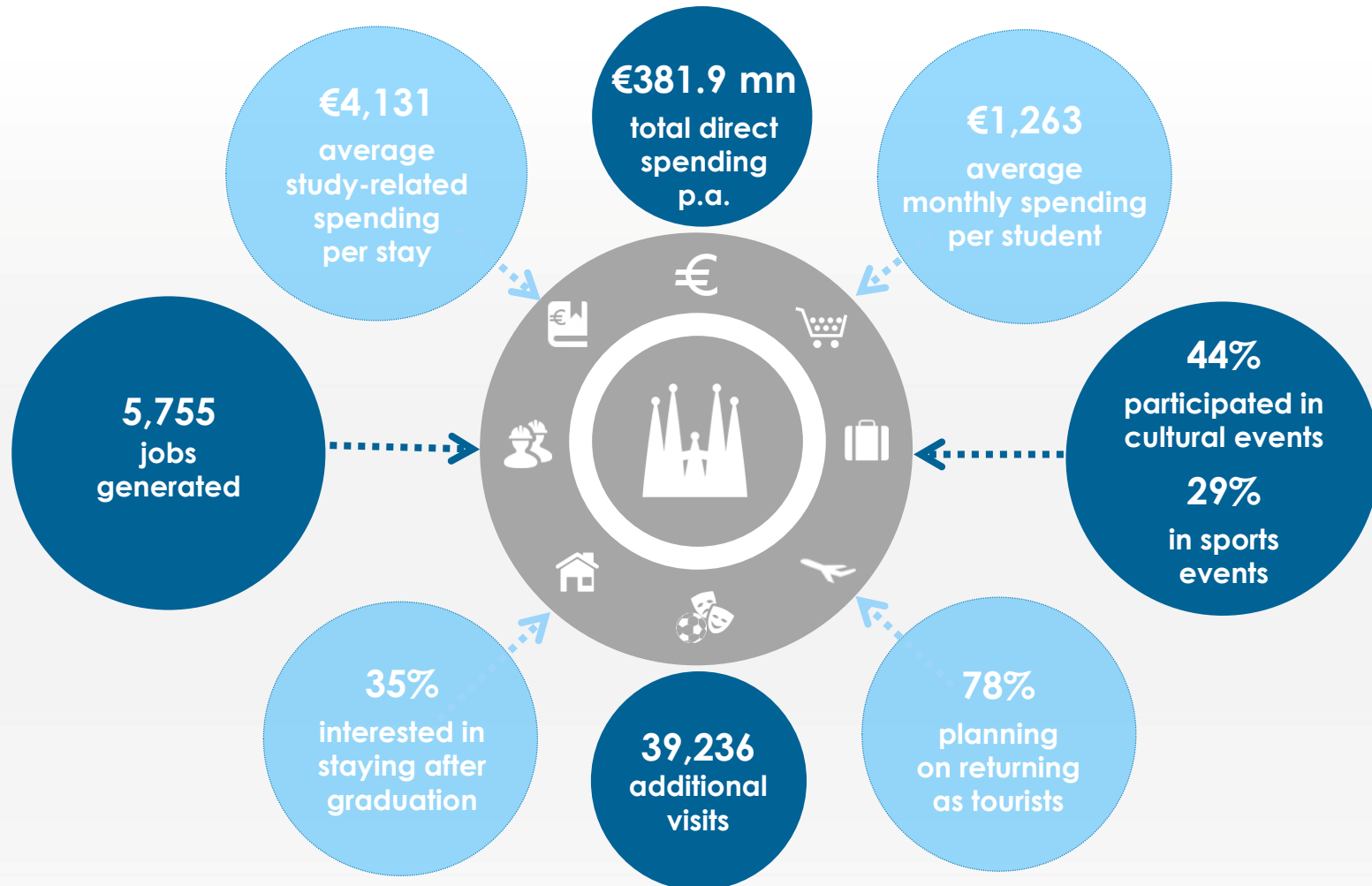
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# PROFILE PAPER: ECONOMIC FOOTPRINT

BARCELONA



# PROFILE PAPER: ECONOMIC IMPACT

BARCELONA

1,000 new  
students

€14.6 mn  
revenues

220 new  
jobs



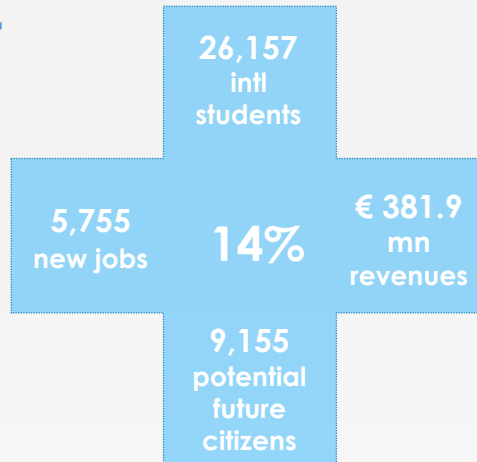
+

350 new  
citizens

+

Talent &  
investment

CURRENT  
LEVEL



VIENNA  
LEVEL



# VALUE PROPOSITION

HAWAII

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- Strategy paper
- Key selling points
- Priority source markets
- ,International' language

QUALITY OF EDUCATION  
RANKINGS  
TANGIBLE MEASURABLES, E.G. PROGRESSION RATES  
LOCATION  
ENGLISH LANGUAGE PREPARATION  
SAFETY  
AFFORDABILITY  
HOUSING OPTIONS  
STUDY RELATED WORK OPPORTUNITIES  
STUDENT CLUBS AND ASSOCIATIONS  
SOCIAL LIFE

Study  
HAWAII'I  
www.studyhawaii.org



# FAM TOUR

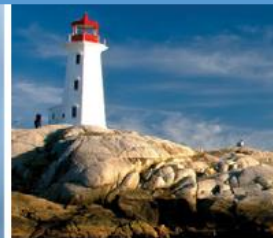
## NOVA SCOTIA

- Pre-selected agents
- K-12 specialist agencies
- Over 100 sending power
- Executive representatives only
- Interview on interest and capability to send enough students to destination

## GET FAMILIAR WITH NOVA SCOTIA.

EduNova is pleased to invite your agency to apply for our 2015 EduNova Agents' Familiarization Tour in Nova Scotia, one of the most beautiful areas in Canada.

The province-wide tour will visit **eight of our member schools** in **six different cities** and will fully focus on learning more



**OCT 18-23, 2015**  
JOIN OUR AGENTS'  
FAMILIARIZATION  
TOUR  
IN NOVA SCOTIA,  
CANADA!



**THIS TOUR  
OFFERS AN  
INSIDER'S VIEW  
OF NOVA SCOTIA,  
DON'T MISS OUT!**

# PRESS TOUR

UBC

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- Pre-selected journalist
- Study abroad media
- Source countries of preference
- Guarantee of media coverage
- Deep immersion into local education and culture



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# TRADE MISSION

CAPSI

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- Cherry-picked education agents
- Top 20 agents from region
- 55% all K12 students
- Embassy officials
- Seminars
- Trade
- Networking
- 1 day > 14 nationalities > 20 agents
- 66% extremely satisfied + 33% very satisfied
- New contracts and students with few month

## CASE STUDY

Selection process in recruitment of buyers for CAPS-i (Canadian Association of Public Schools - international) Trade Mission to Central and Eastern Europe, organized in Vienna, Austria in April 2014:



Participating agencies were recruited from 13 Central and Eastern European countries and together represented **55% market share** - accounting for more than half of all high schools abroad traffic from these countries.



# CELEBRITY MARKETING

CLIFTON COLLEGE

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- YouTube star (Vlogger)
- With numerous subscribers
- Invited to study abroad for a time
- Creates video clips for her followers
- Millions get familiar about destination
- And particular school institution
- From trusted person aka authority



# SCHOLARSHIP

AUSTRALIA

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- The Best Job in the World
- Involving most State Tourism Organisations
- More than 330,000 people from 196 countries expressed interest in the six dream jobs with more than 40,000 video entries being uploaded

SIX LIFE-CHANGING JOBS, \$100,000 PACKAGE\*

THE BEST JOBS  
IN THE WORLD

THERE'S NOTHING  
LIKE AUSTRALIA



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# VIRAL EVENT

SYDNEY

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- The Biggest English Lesson in the World!
- Bondi Beach was the classroom of a LIVE English Lesson for 3,000 international students who attempted a Guinness World Record and made history



Source: [www.biggestenglish.com](http://www.biggestenglish.com)



[WWW.STUDENT-MARKET.COM](http://WWW.STUDENT-MARKET.COM)



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# ROUNDTABLE

DFAID

- B2B
- Peer-to-peer roundtable
- On margin of other industry event
- Mostly conferences
- Or student fairs



Embassy of Canada to Czech Republic  
Foreign Affairs, Trade and Development Canada  
[www.educationau-incanada.ca](http://www.educationau-incanada.ca)

Canada - Central and Eastern Europe Roundtable  
on Higher Education Cooperation

## Exclusive Invitation

The Embassy of Canada to the Czech Republic and the Department of Foreign Affairs, Trade and Development Canada cordially invite you to a Canada - Central and Eastern Europe Roundtable on Higher Education Cooperation.

The objective of the roundtable is to discuss partnerships, collaboration opportunities and models between Canadian and Central and Eastern European post-secondary institutions, particularly in the areas of student mobility, research collaboration and joint programming.

This exclusive event will take place on September 15<sup>th</sup>, 2014 at the Corinthia Hotel Prague, immediately preceding the EAIE 2014 conference.

We are looking forward to welcoming you to Prague.

Chris Greenshields  
Director  
International Education and Division  
Foreign Affairs, Trade and Development Canada



Government of Canada  
Embassy of Canada

Gouvernement du Canada  
Ambassade du Canada



- Data for members
- Topic and data for industry
- Content interesting for media and industry stakeholders
- Marketing function towards desired audiences

## IALC Study Travel Research Report 2015

### Perception of independent and boutique chain schools in language travel



# INTERNATIONAL ALUMNI CLUB

PROVINCE

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- Provincial alumni club for internationals
- Create proud and reason to share
- Initiate critical mass for ambassadors
- Enhance word of mouth (50% of new commencments)



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# STUDENT EVENT

CANADA

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- Affiliation with desired selling point
- Regular newsworthy content
- Marketing role in targeting preferred audiences

## The Canadian Student Leadership Conference (CSLC)

CSLC is Canada's longest running national student leadership conference and is exclusive for CSLA member schools





# ONLINE CAMPAIGN

CAPSI

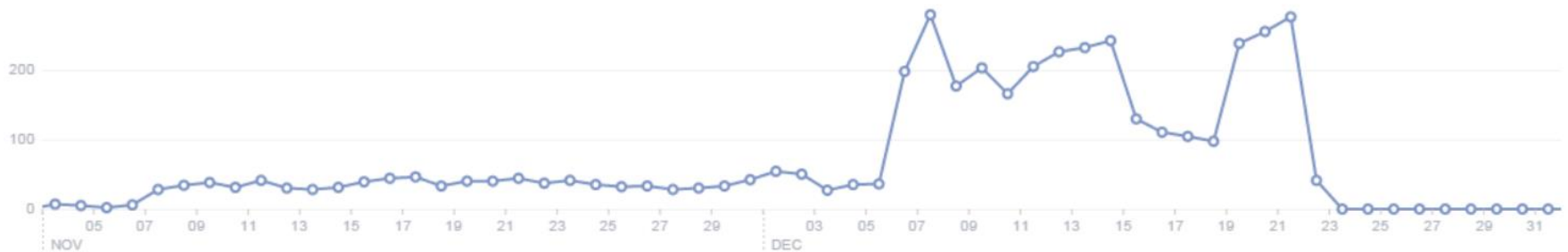
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- Direct traffic
- PPC and PR campaigns
- In selected source markets
- Routing to main destination website > distributed to members

## Campaign report

— Clicks to Website



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FACEBOOK.COM/STUDENTMARKTNG

# IN-COUNTRY SALES PRESENCE



OF SALES PEOPLE ARE  
LOCATED IN SOURCE  
COUNTRIES

Source: StudentMarketing, 2015



# DYNAMIC PRICES

HEDGING

GROSS PRICE

DYNAMIC PRICING

SEASONAL PRICING

BONUSES

NET PRICE

SPECIAL OFFERS

DISCOUNTS

REGIONAL PRICING

Source: StudentMarketing, 2015

- Bright future for Canada
- Short-term devaluation of British pound
- Trumpism in the USA
- Canada is leading in terms of regulatory changes
- Limited global supply of international students
- Need to be more present and active in overseas markets

**Source:** StudentMarketing, 2017

# THANK YOU!

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SAMUEL VETRAK, CEO, STUDENTMARKETING