

The i-graduate ICEF Agent Barometer 2014

Sarah Mines & Caroline Levesque
ICEF Canada

CBIE Conference
Ottawa, Ontario
November 19-22, 2014





The i-graduate ICEF Agent Barometer

- *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.***

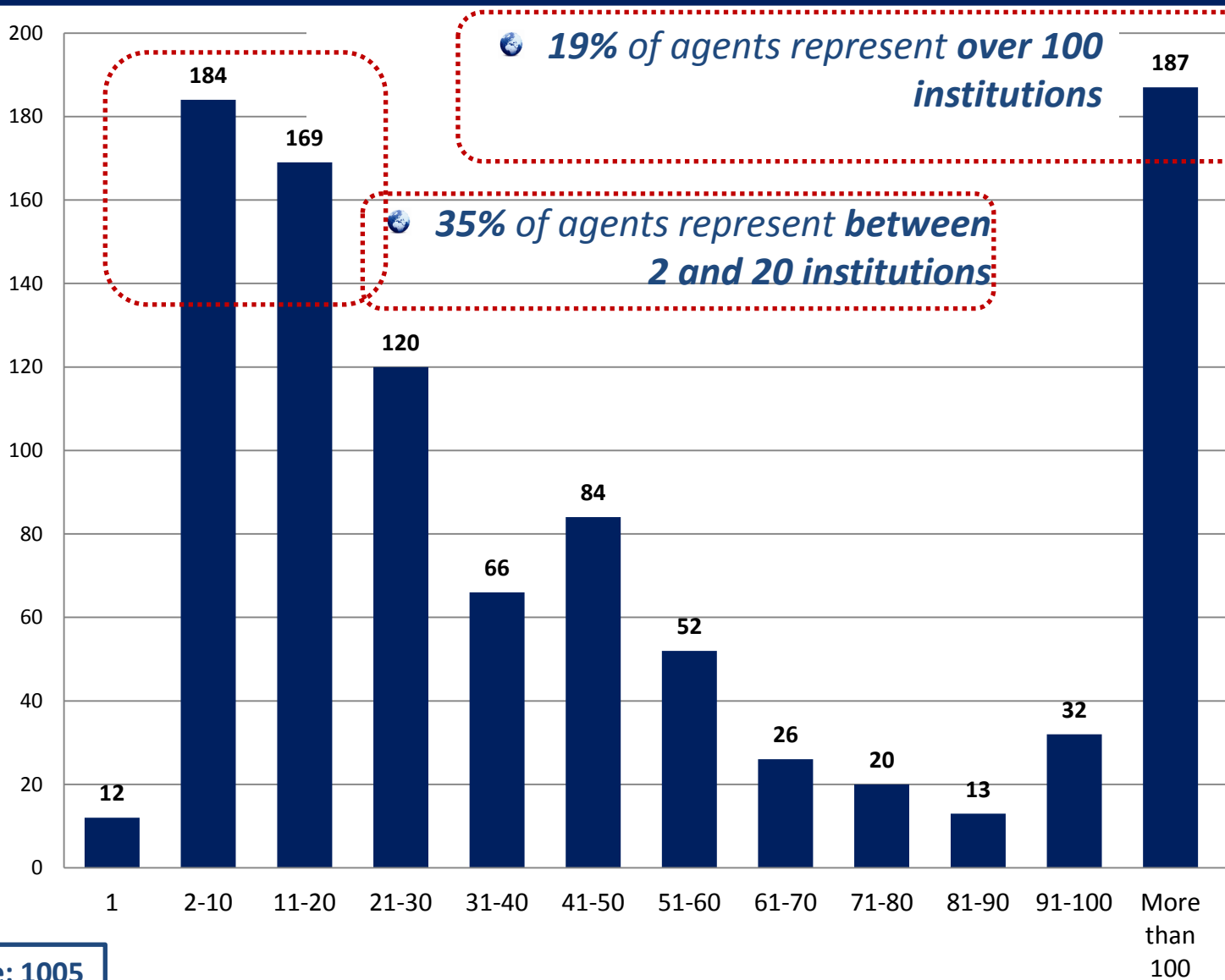
Agent Barometer 2014: *Profile of respondents*



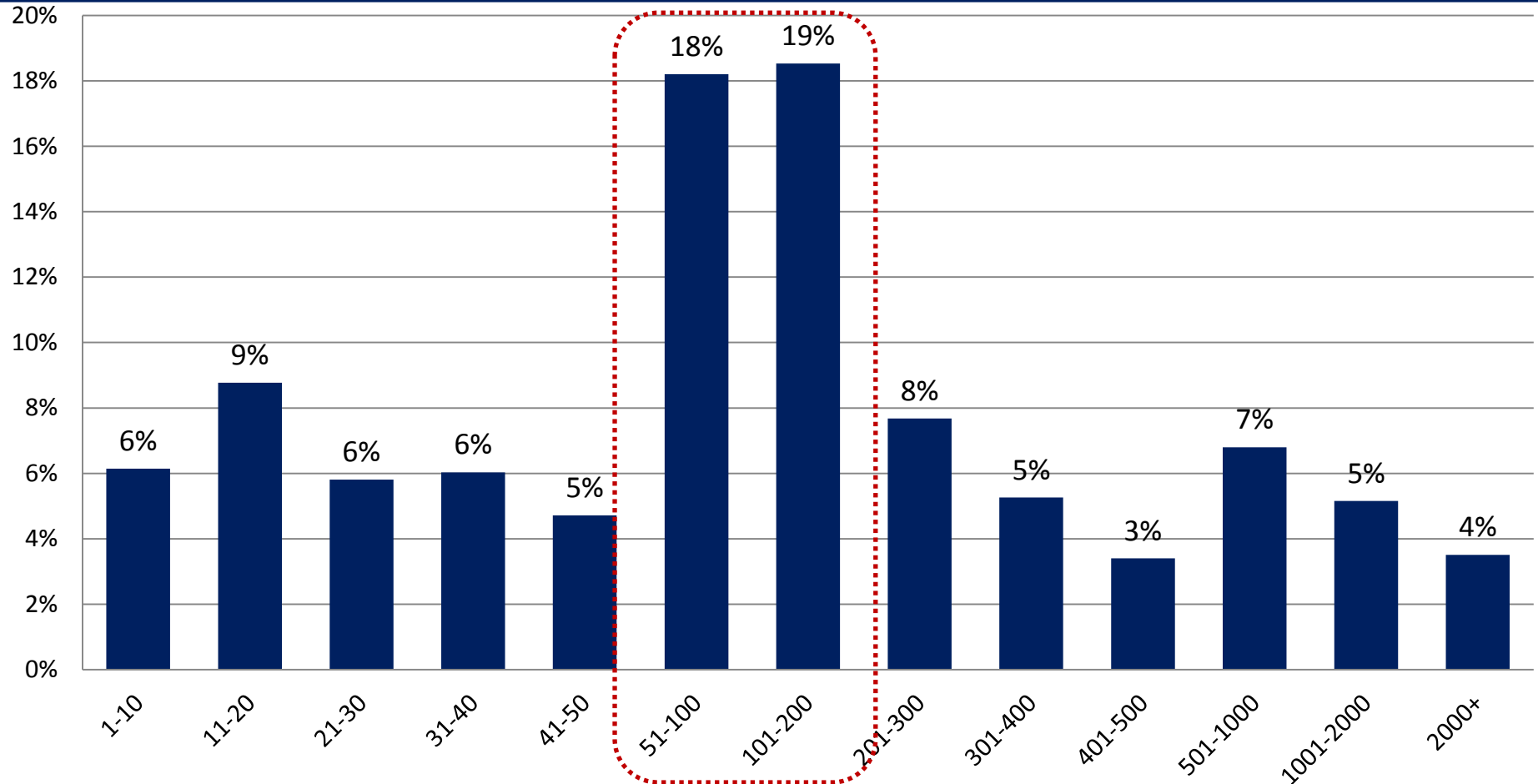
🌐 *104 nationalities represented in this years survey.*

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

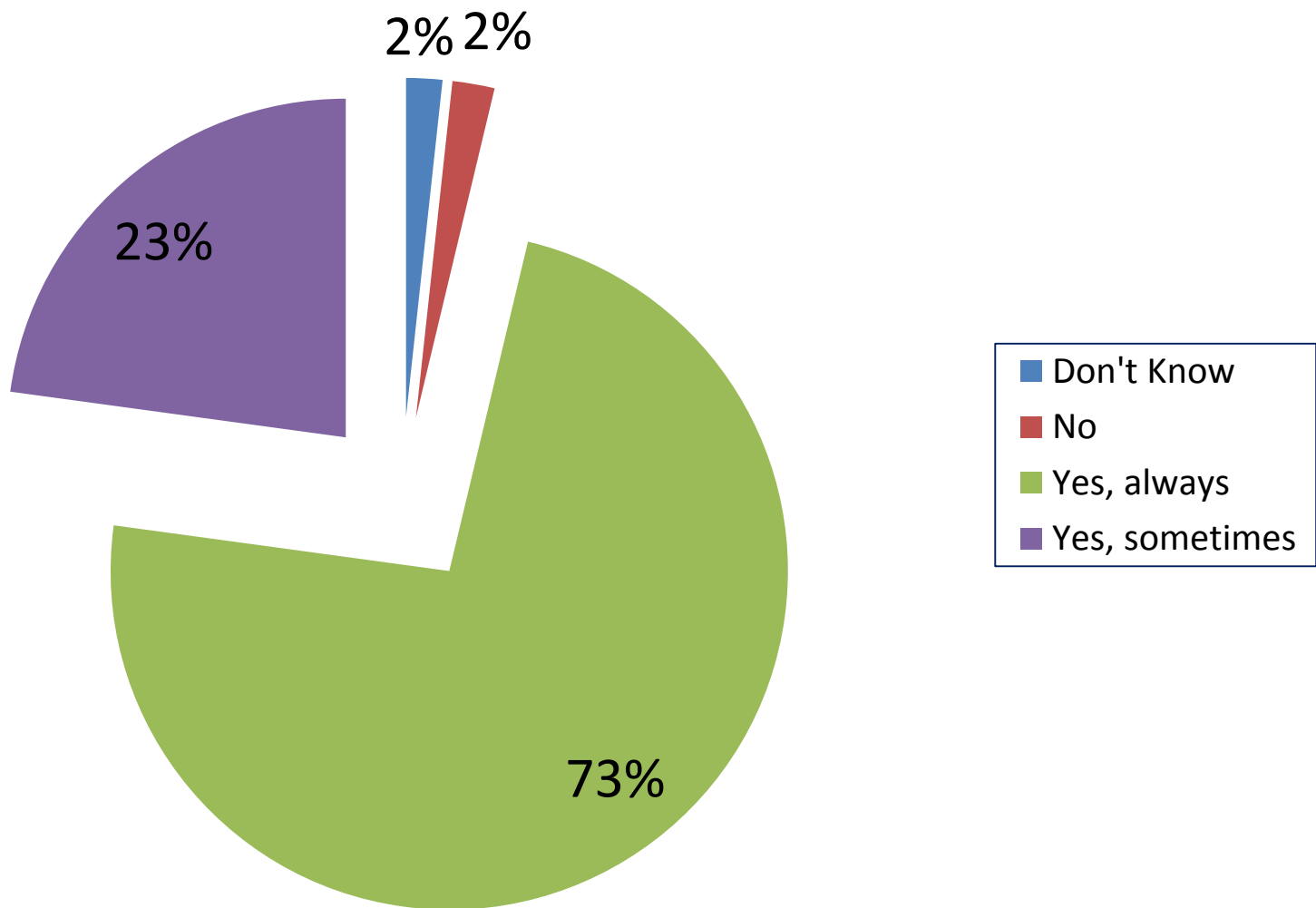


The greatest proportion of agents are placing between **51 and 200 students** annually.

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

Base: 912

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

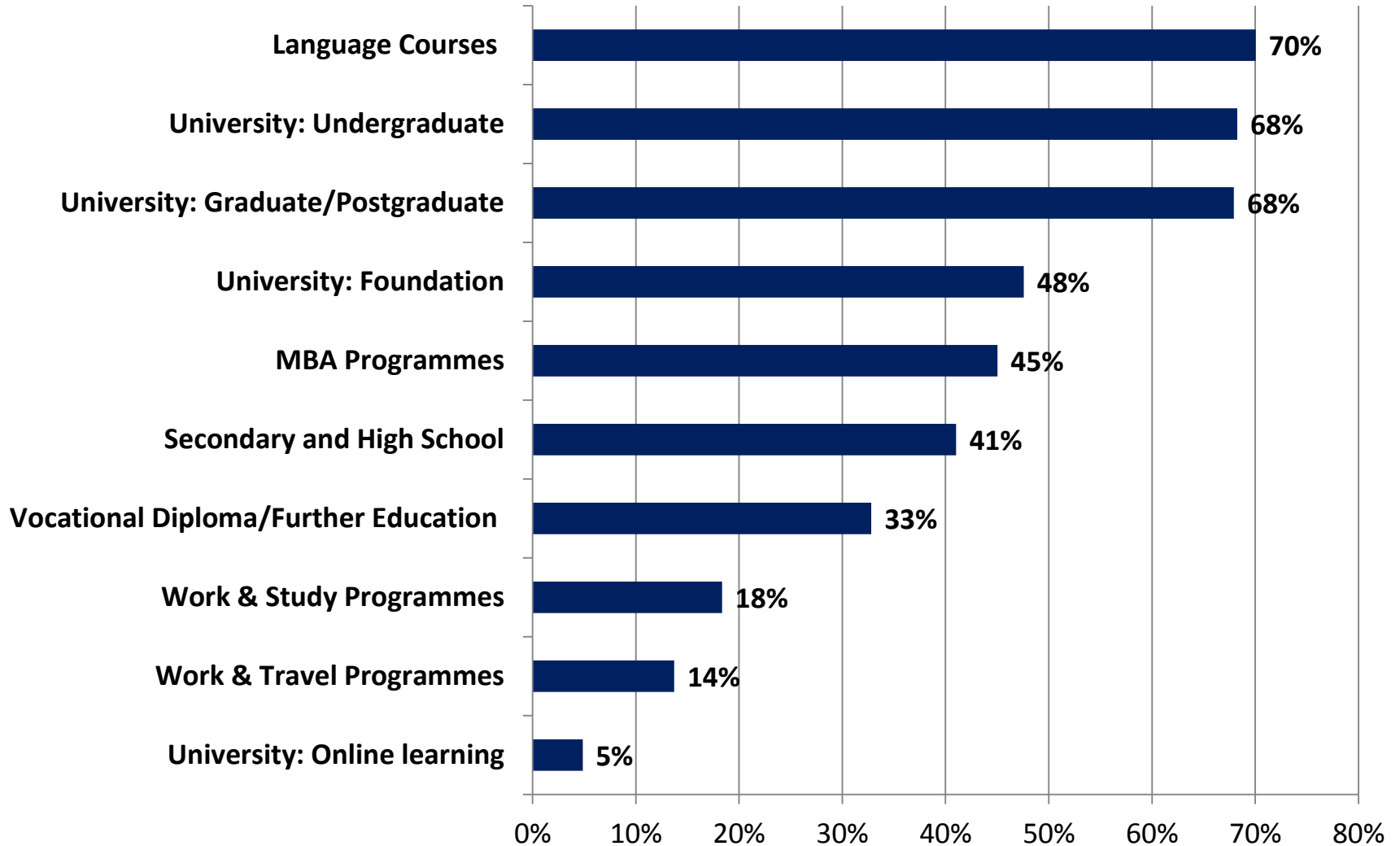


Base: 696

Scope of activity

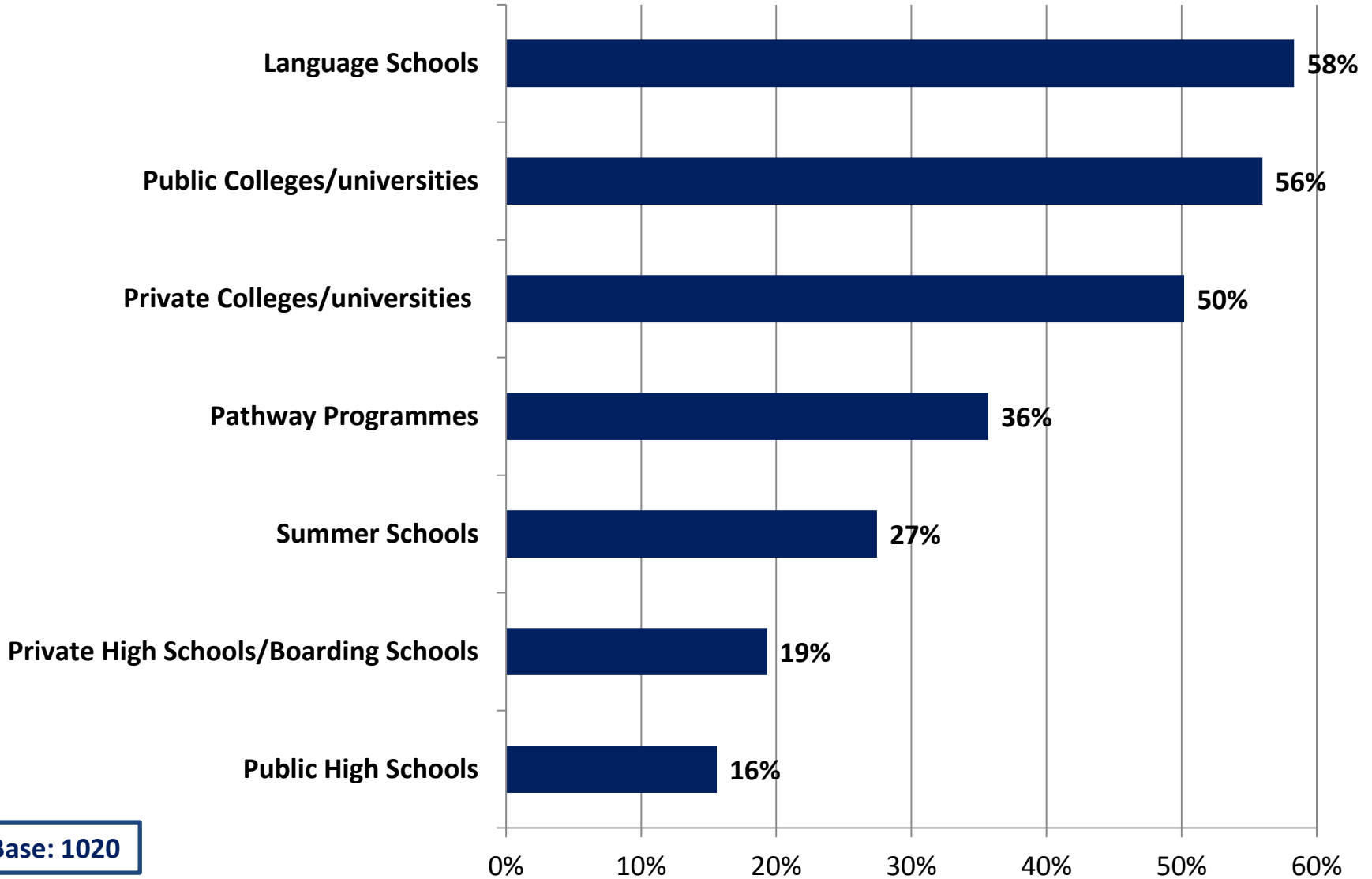


For which types of study do you recruit students?



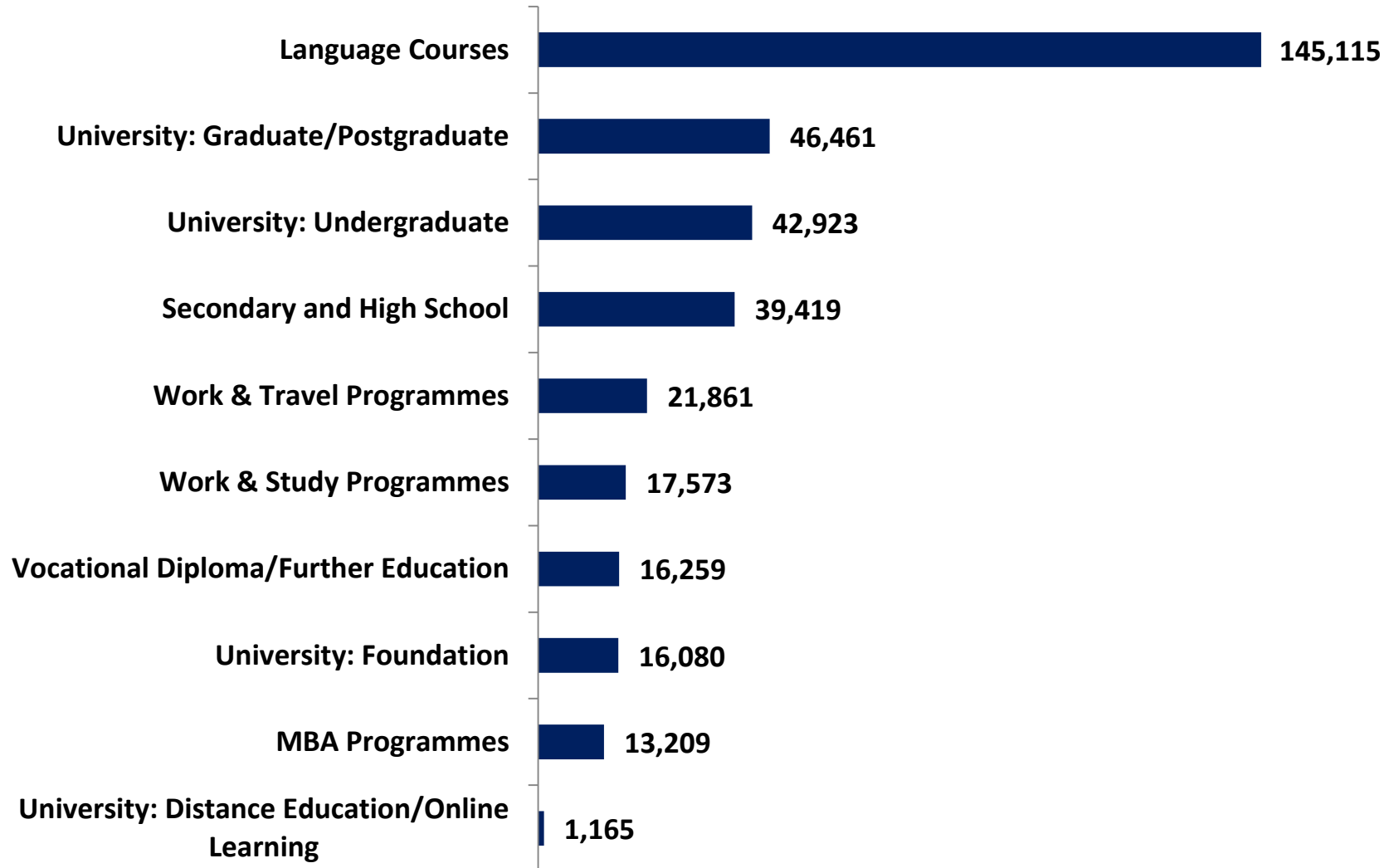
Base: 948

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



Base: 1020

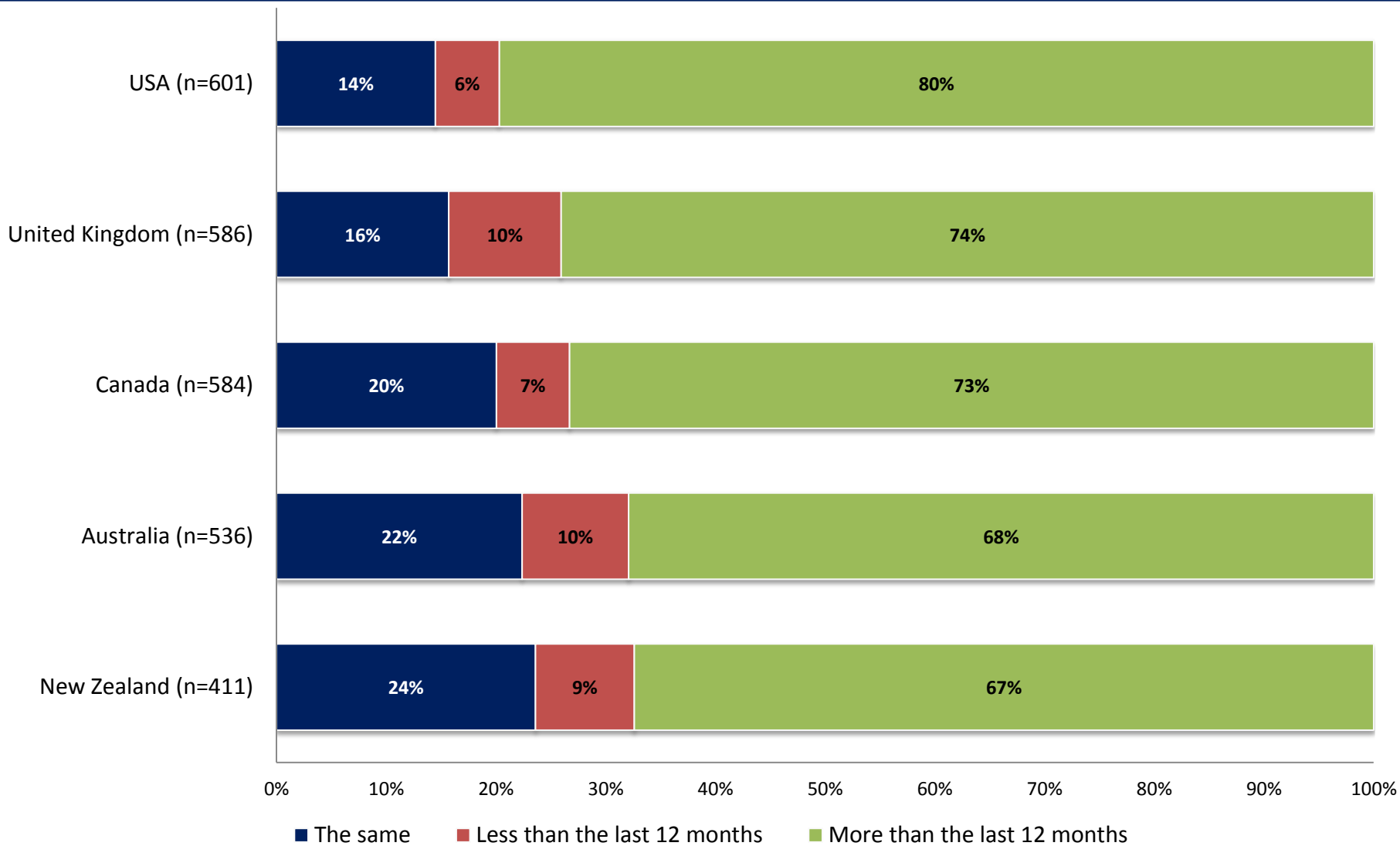
Number of students placed in the last 12 months



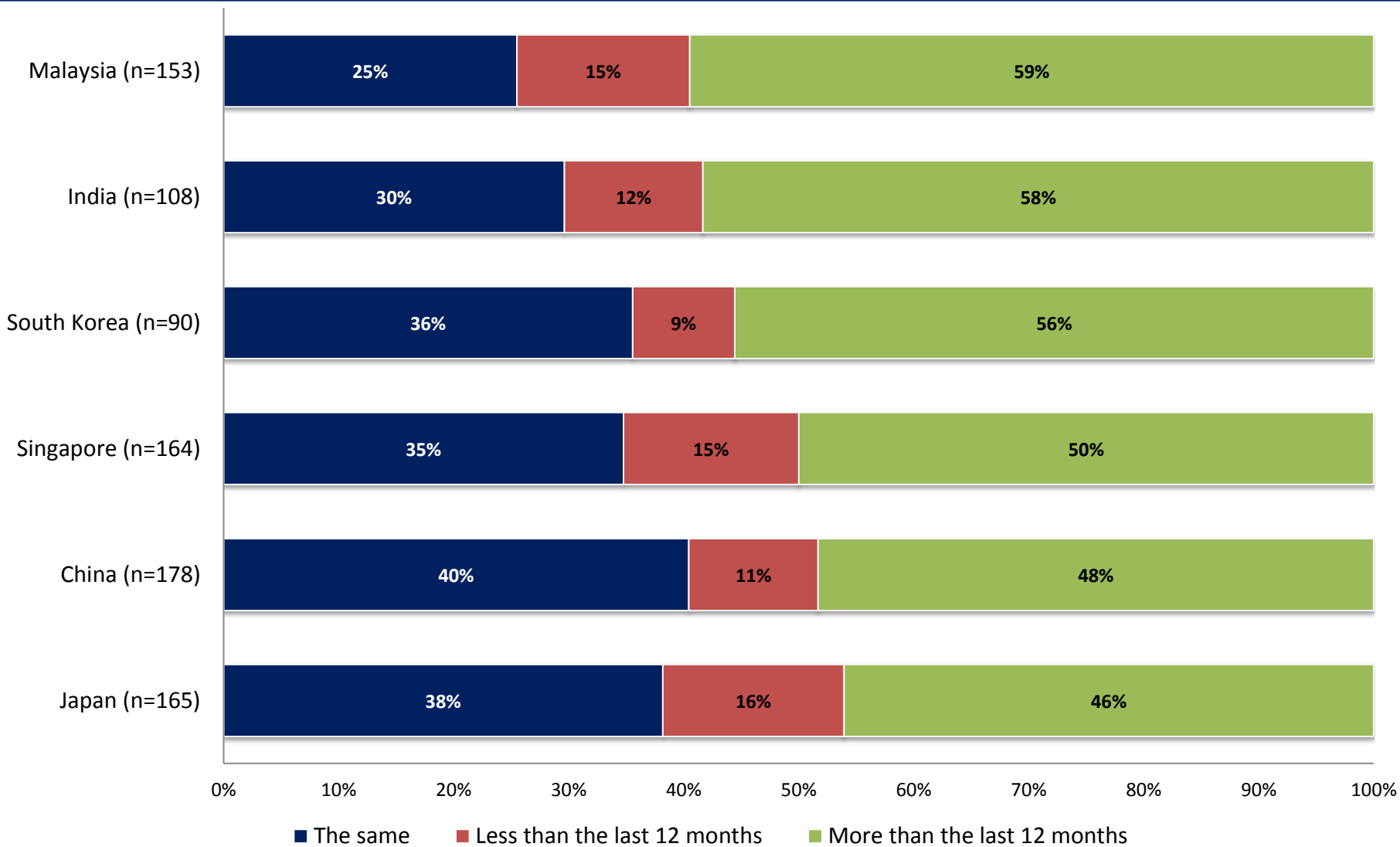
How many students do agents expect to place in the next 12 months?



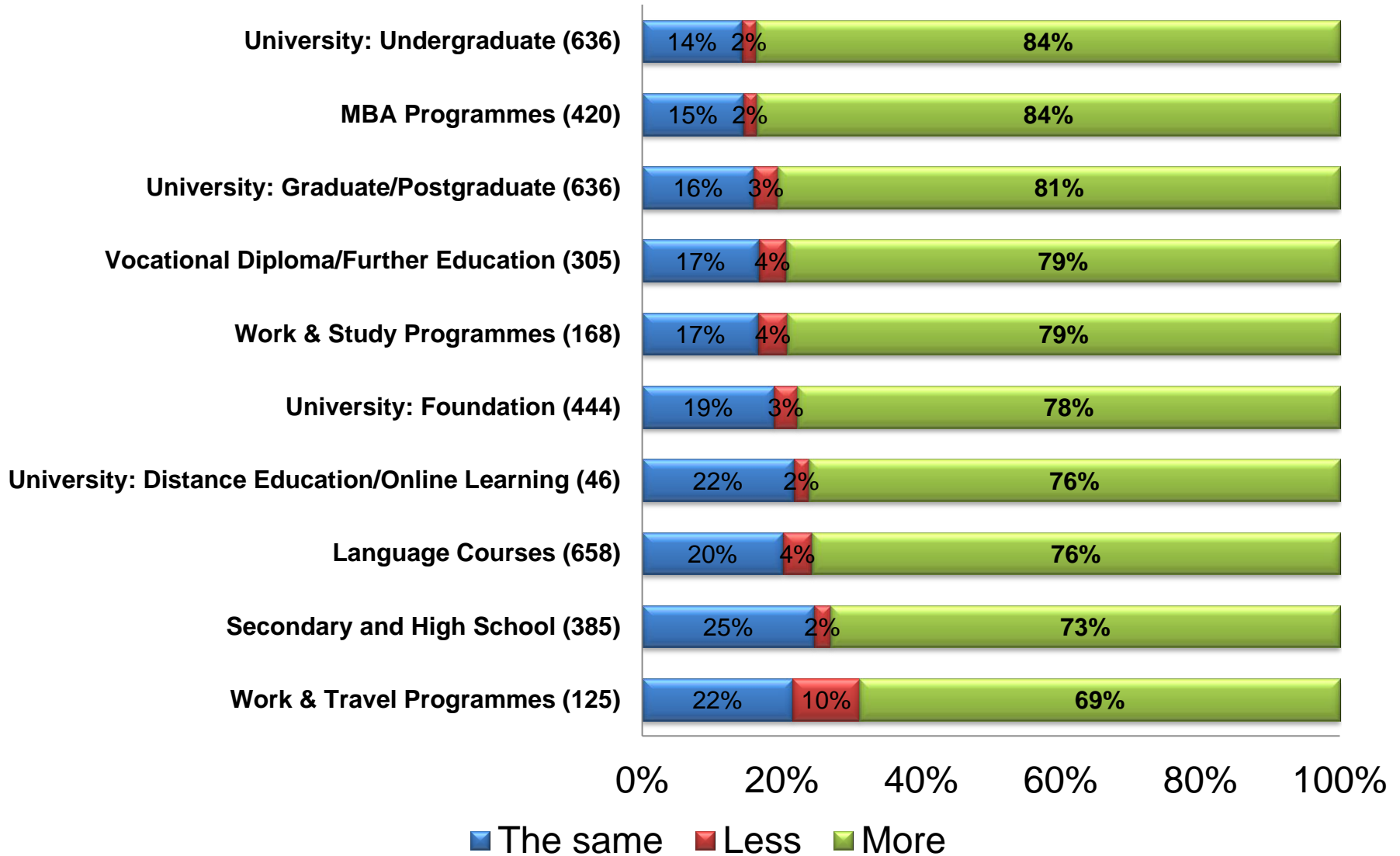
Approximately how many students do you expect to place overall in the next 12 month? **TRADITIONAL MARKETS**



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



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

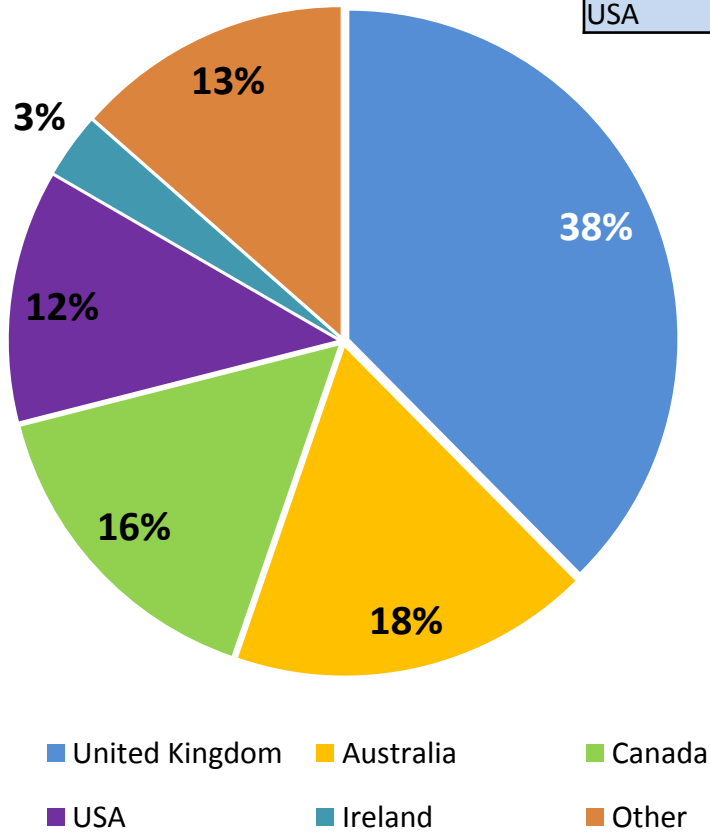


Which country is best...?
By type of study

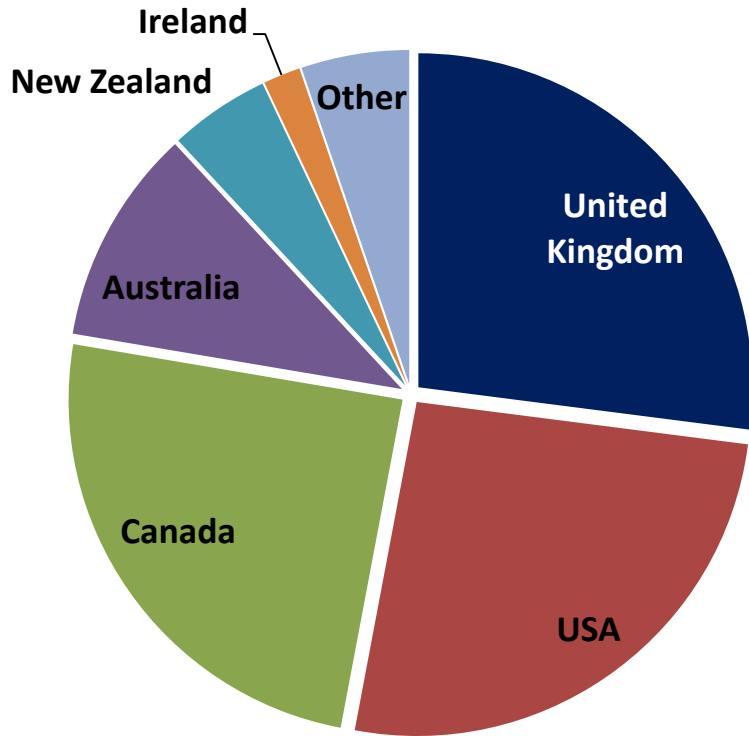


Language courses (n=673)

	% 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

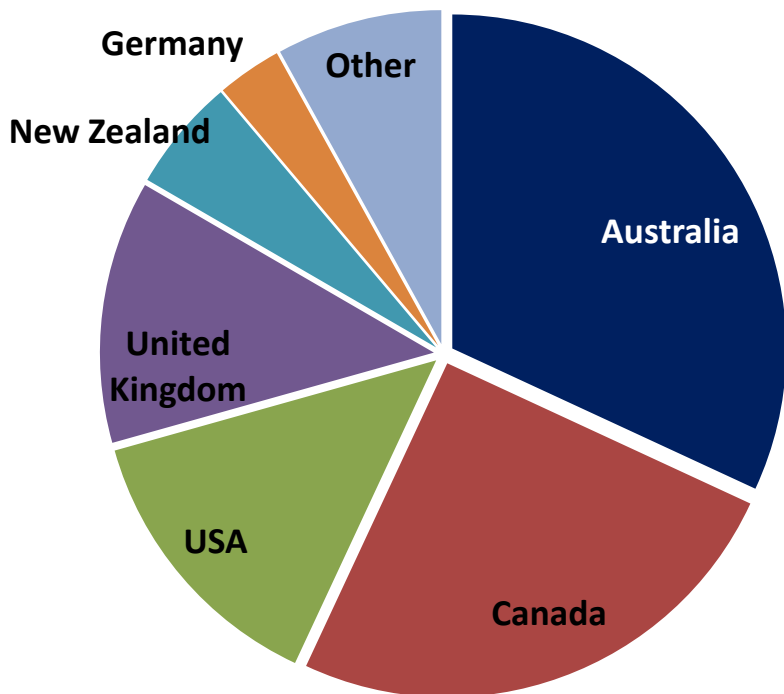


Secondary and High School (n=555)



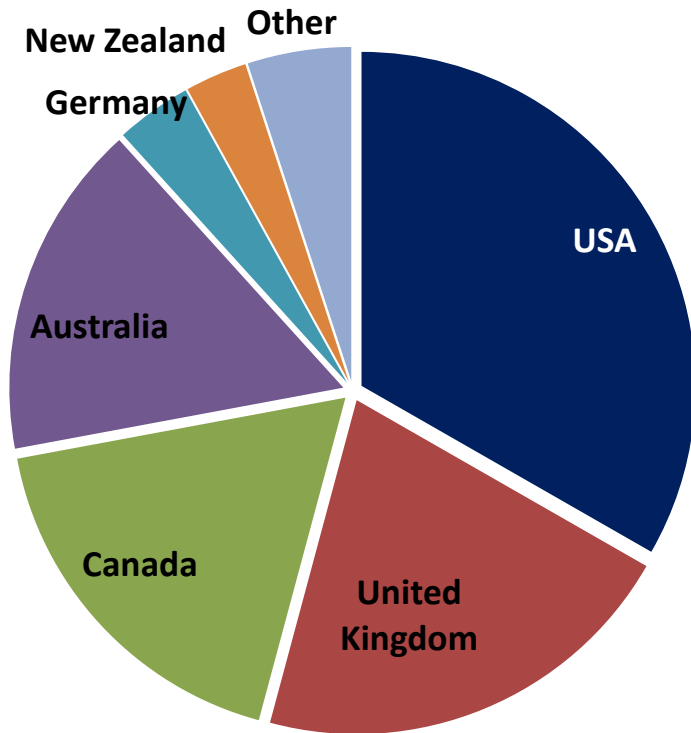
	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
United Kingdom	27%	1	1	1	1	1	1
USA	26%	2	2	2	2	2	2
Canada	25%	3	3	3	3	3	3
Australia	10%	4	4	4	4	4	4
New Zealand	5%	5	5	5	5	5	5

Vocational diploma/Further education (n=511)



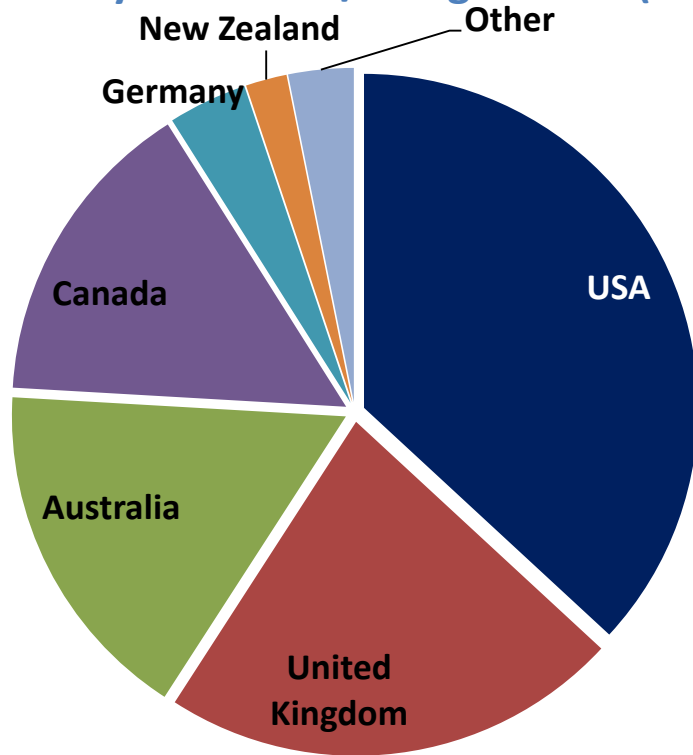
	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
Australia	32%	1	1	1	1	1	2
Canada	25%	2	2	3	3	4	4
United Kingdom	13%	4	3	2	2	2	1
USA	14%	3	4	4	4	3	3
New Zealand	5%	5	5	5	5	5	5

University: Undergraduate (n=598)



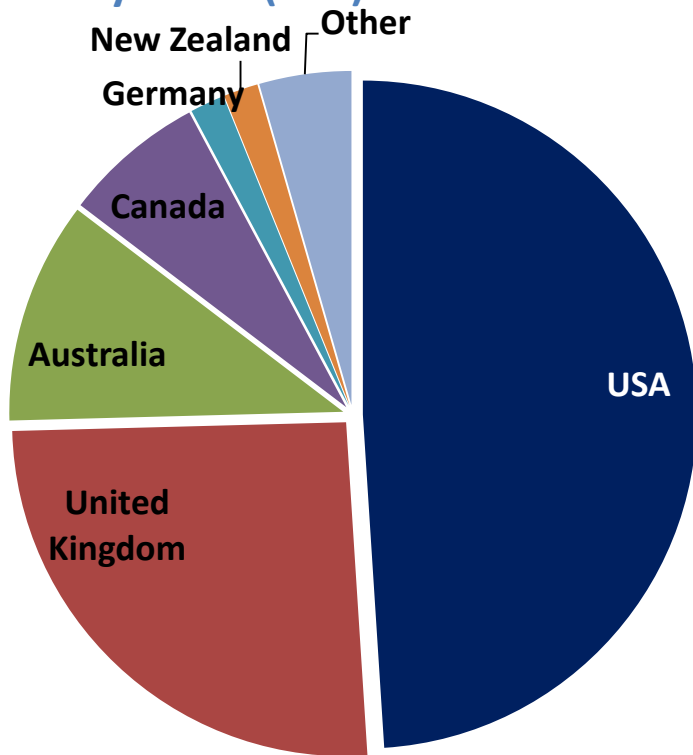
	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
USA	33%	1	1	1	1	1	1
United Kingdom	21%	2	2	2	2	2	2
Australia	16%	4	3	4	3	4	3
Canada	18%	3	4	3	4	3	4

University: Graduate/Postgraduate (n=602)



	% 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

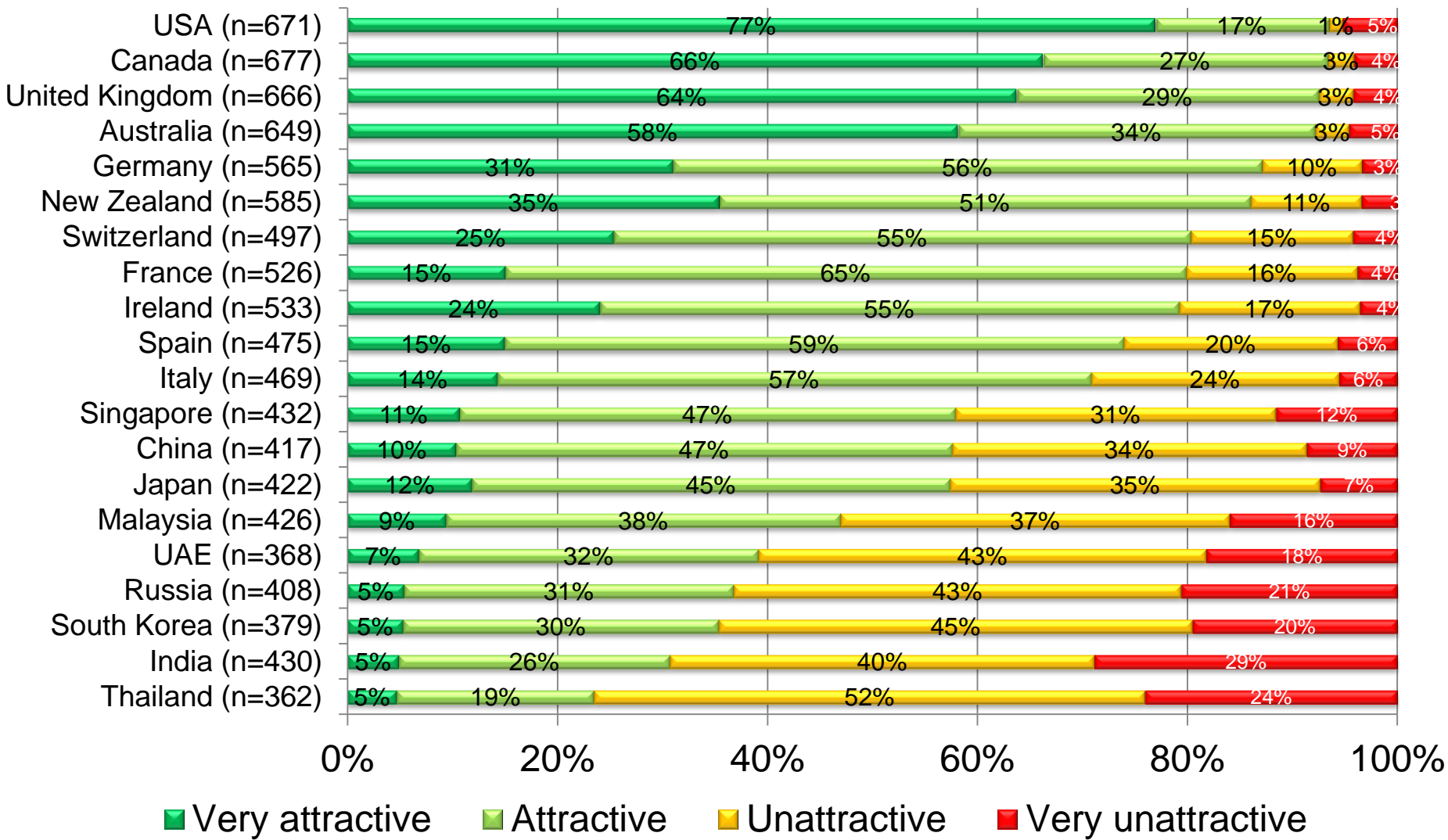
University: MBA (539)



	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009	Rank 2008
USA	49%	1	1	1	1	1	1	1
United Kingdom	26%	2	2	2	2	2	2	2
Australia	11%	3	3	4	3	3	3	3
Canada	7%	4	4	3	4	4	4	4

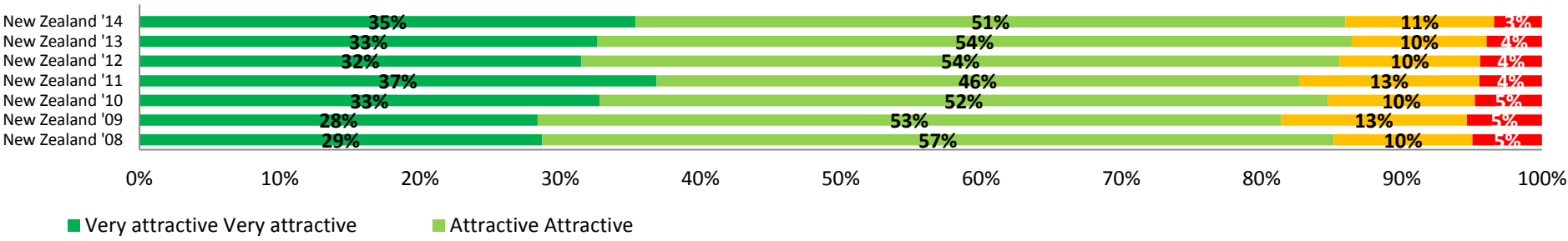
Overall attractiveness of study destinations

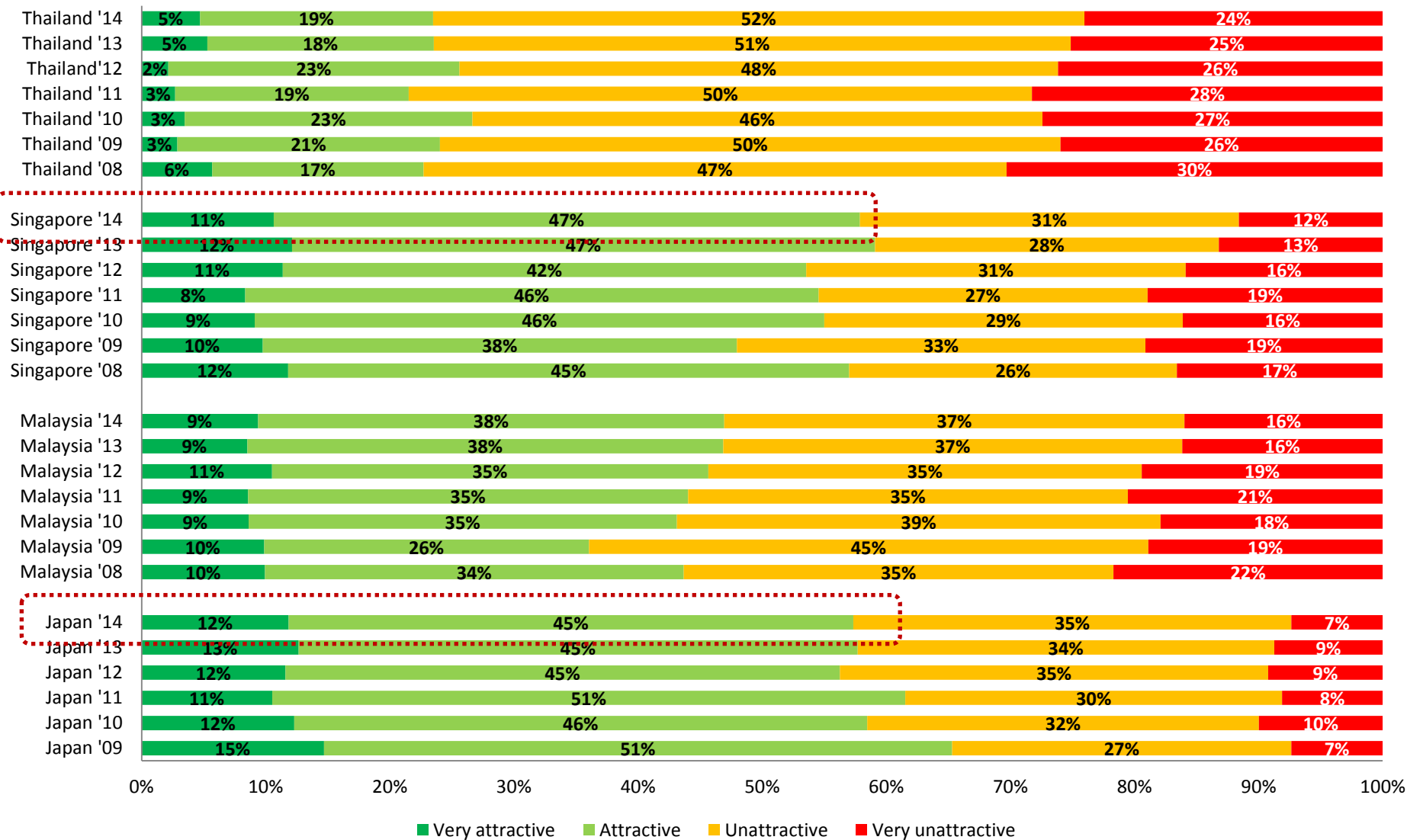




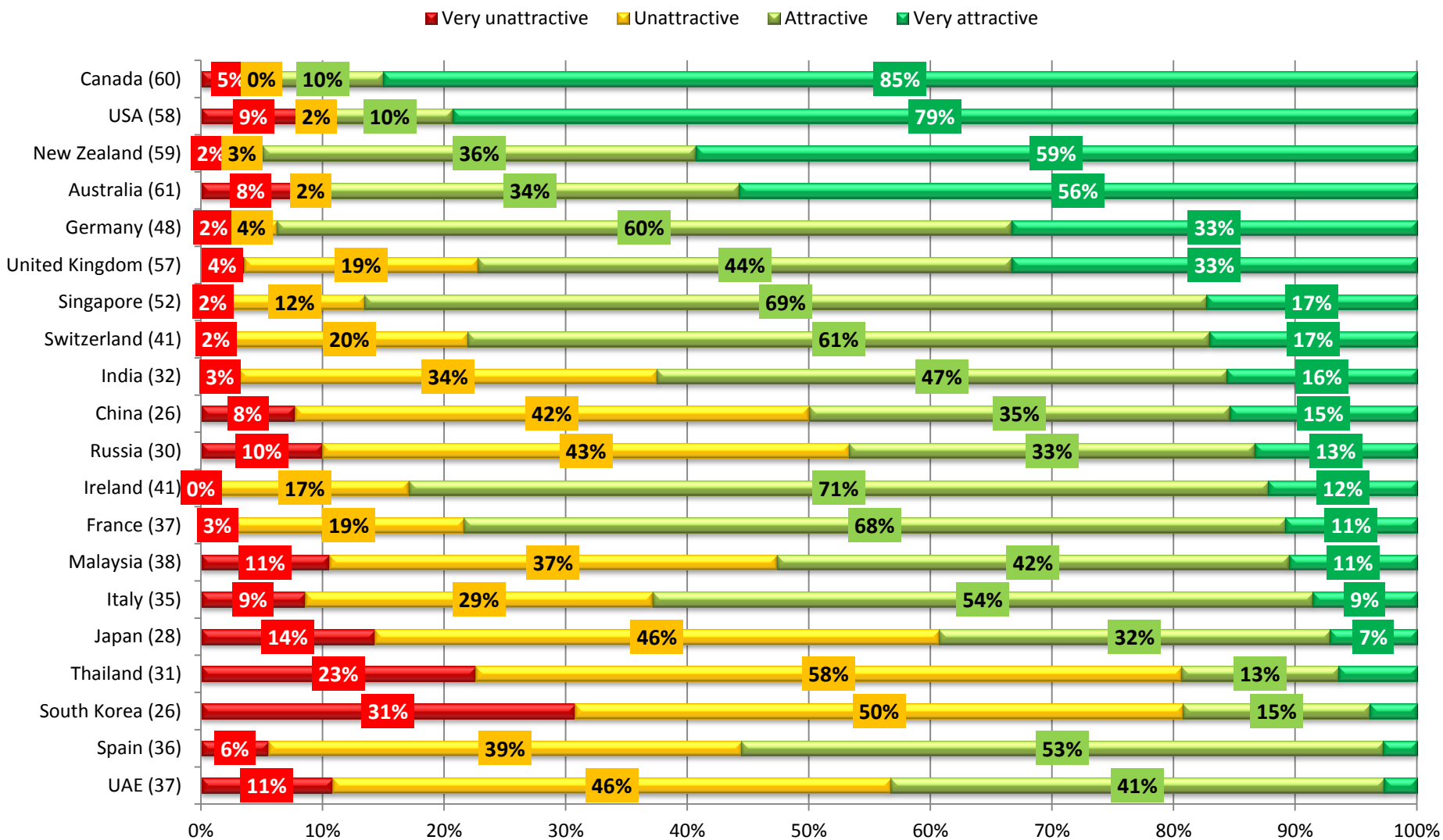
Traditional markets remain top of 'attractive' list

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



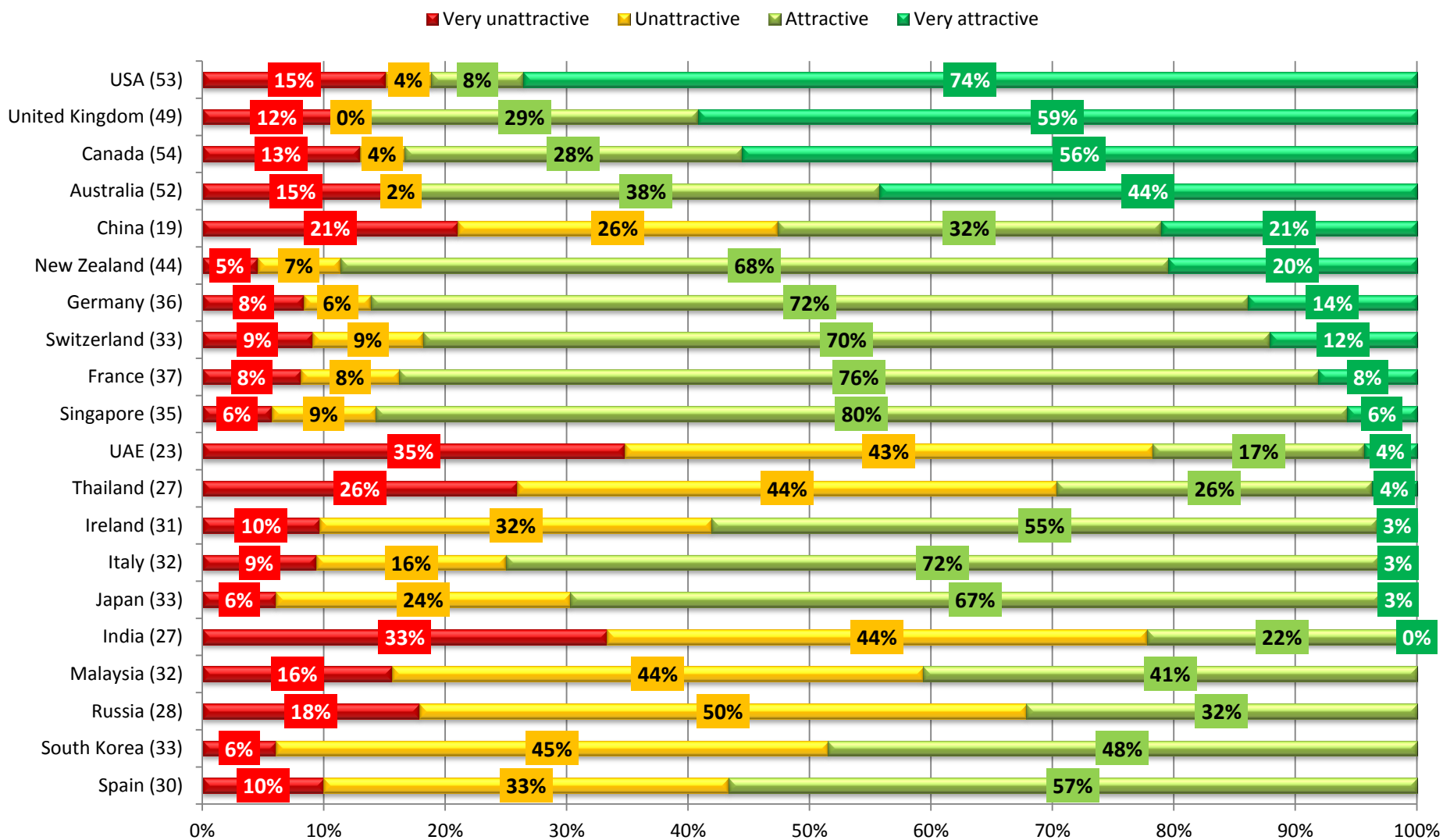


Indian Agents



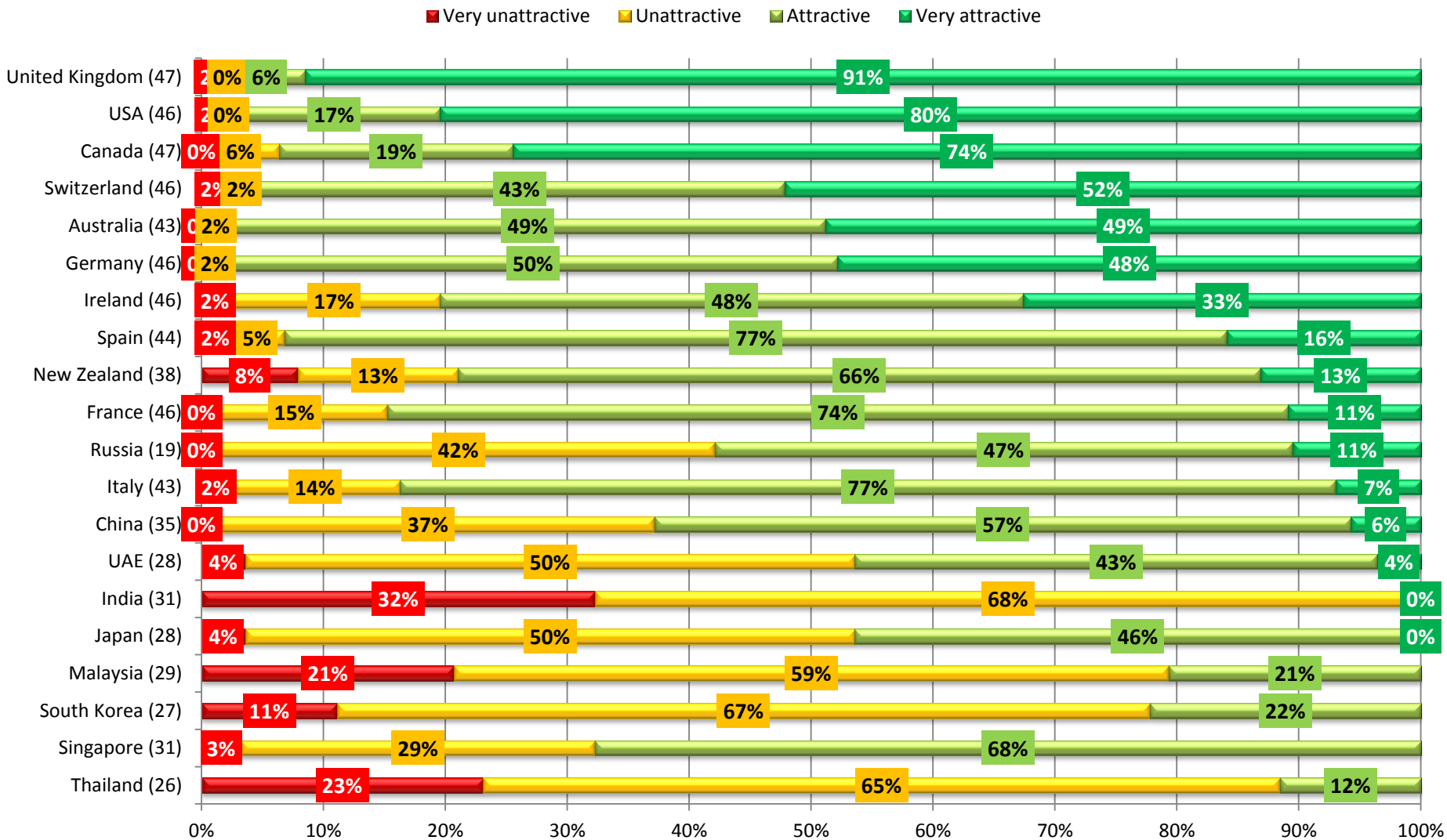
Note: Excludes respondents that indicated they 'Do not know'

Chinese Agents



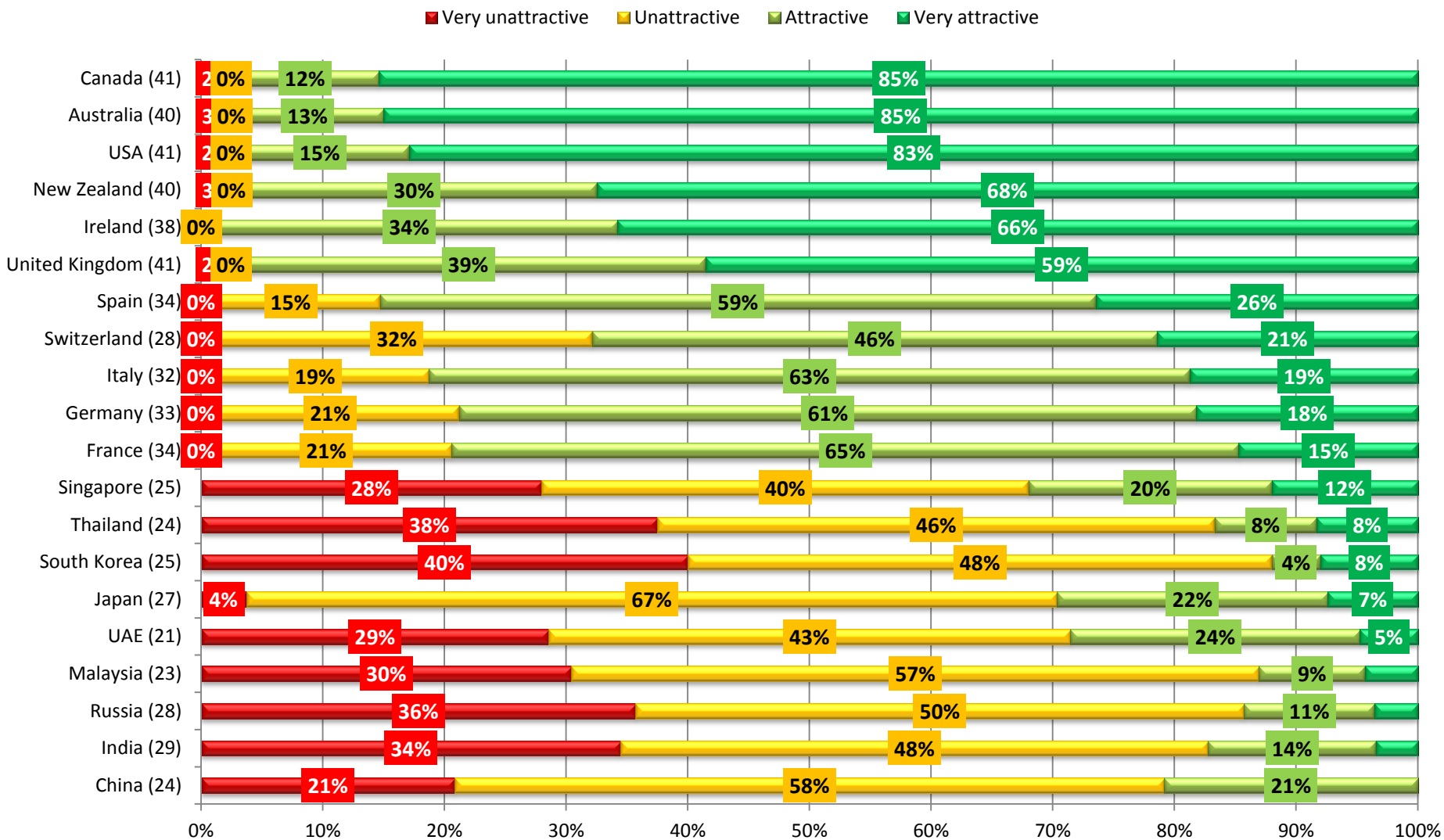
Note: Excludes respondents that indicated they 'Do not know'

Russian Agents



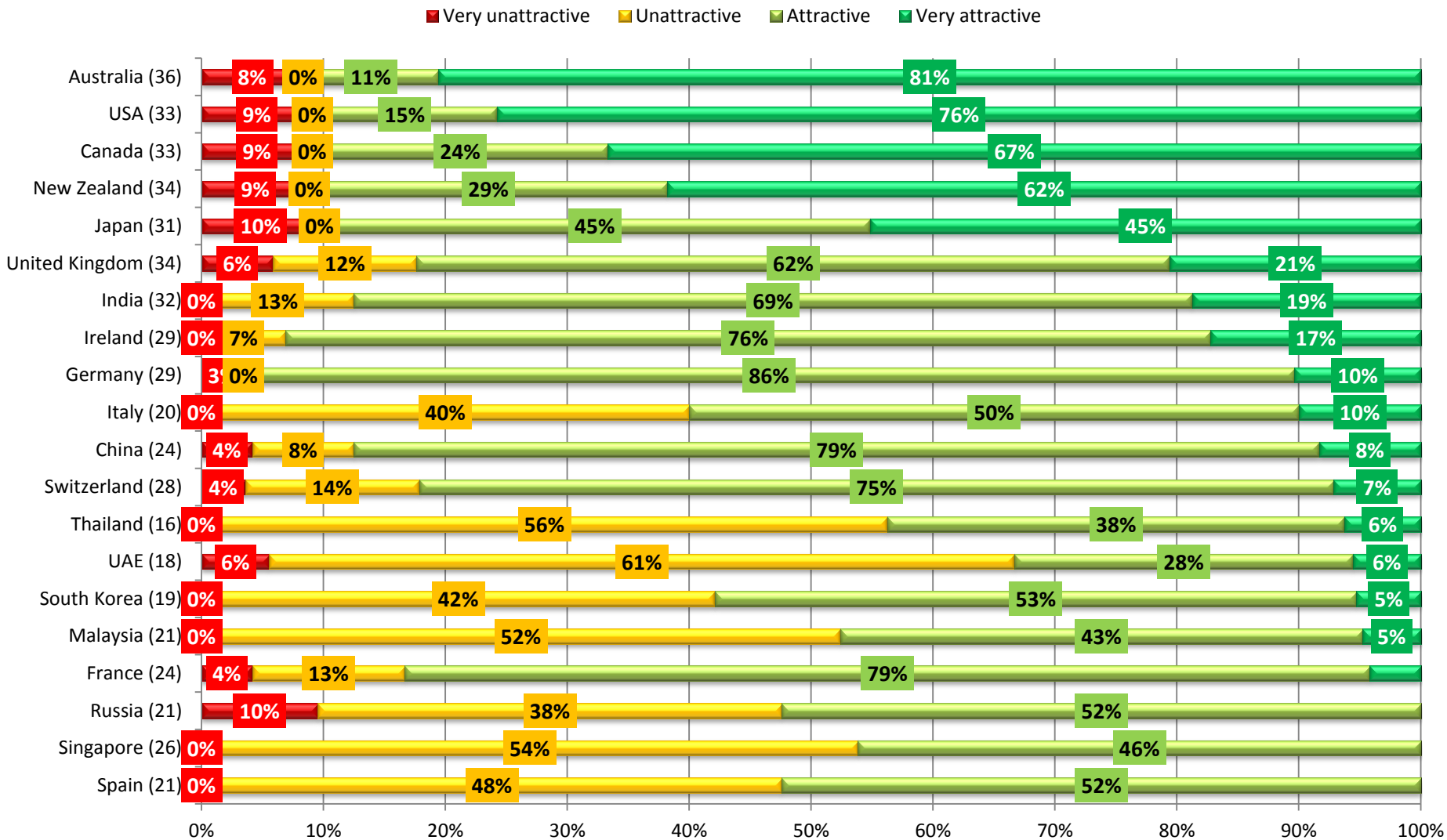
Note: Excludes respondents that indicated they 'Do not know'

Brazilian Agents



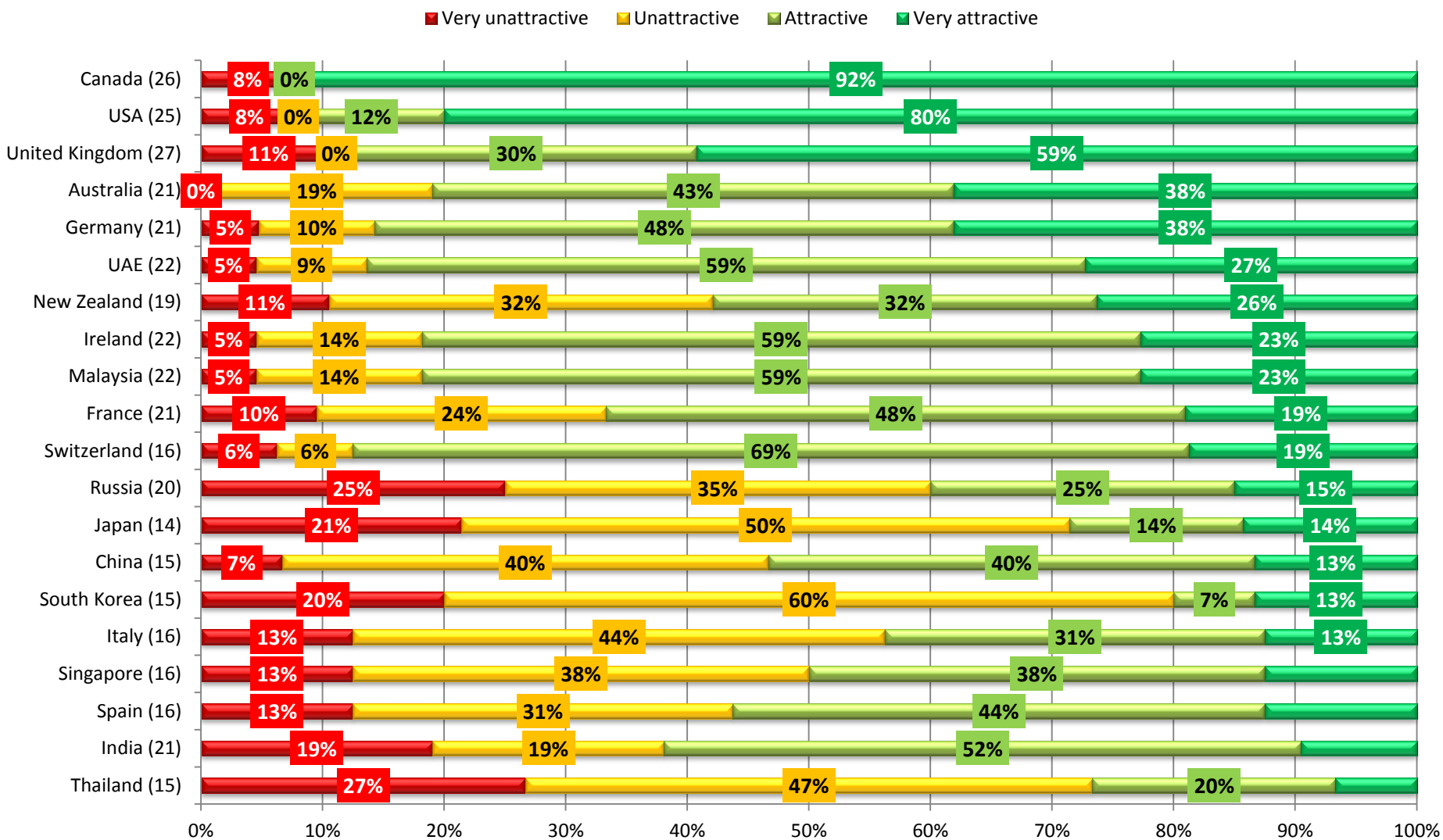
Note: Excludes respondents that indicated they 'Do not know'

Nepalese Agents



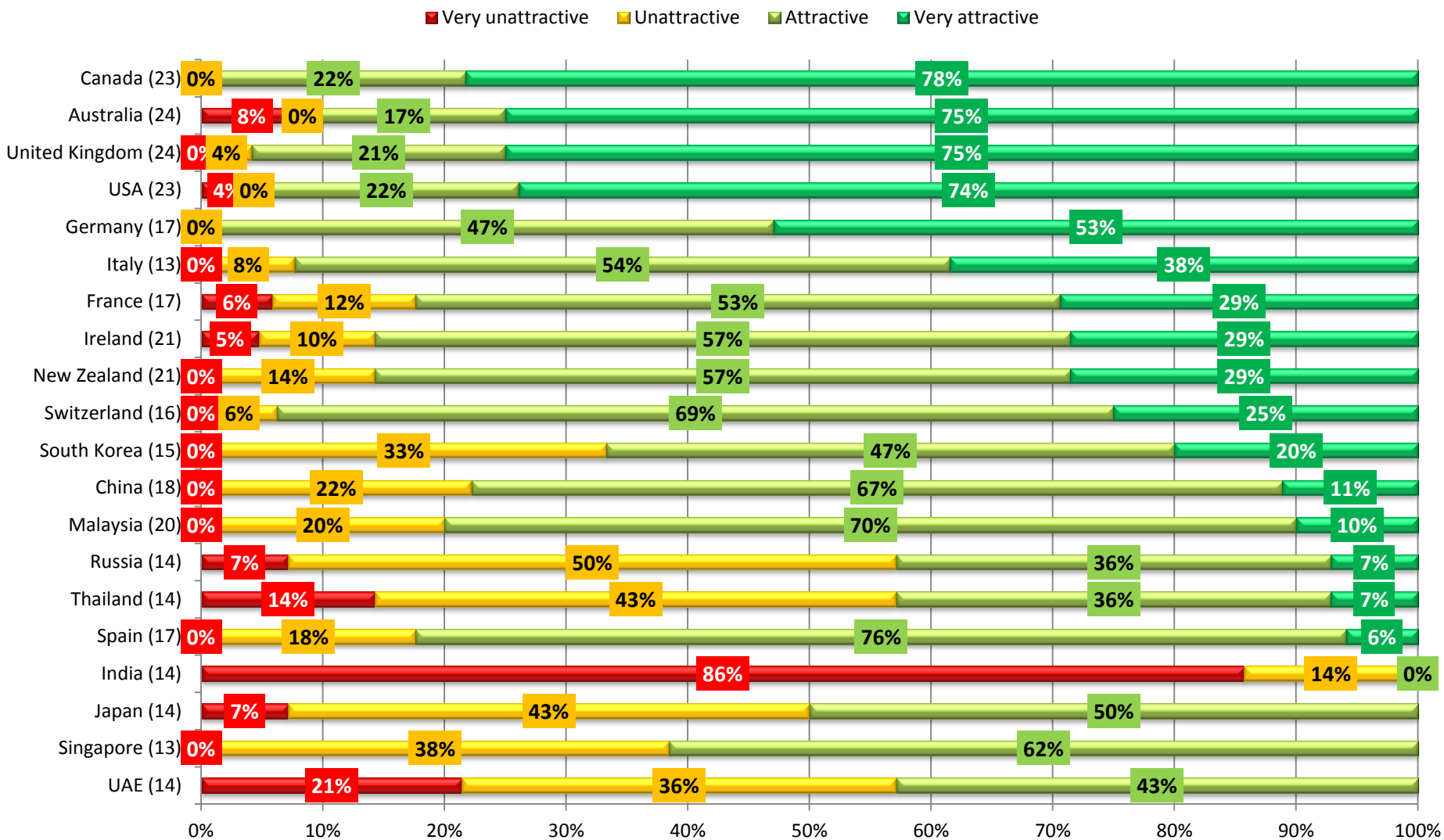
Note: Excludes respondents that indicated they 'Do not know'

Nigerian Agents



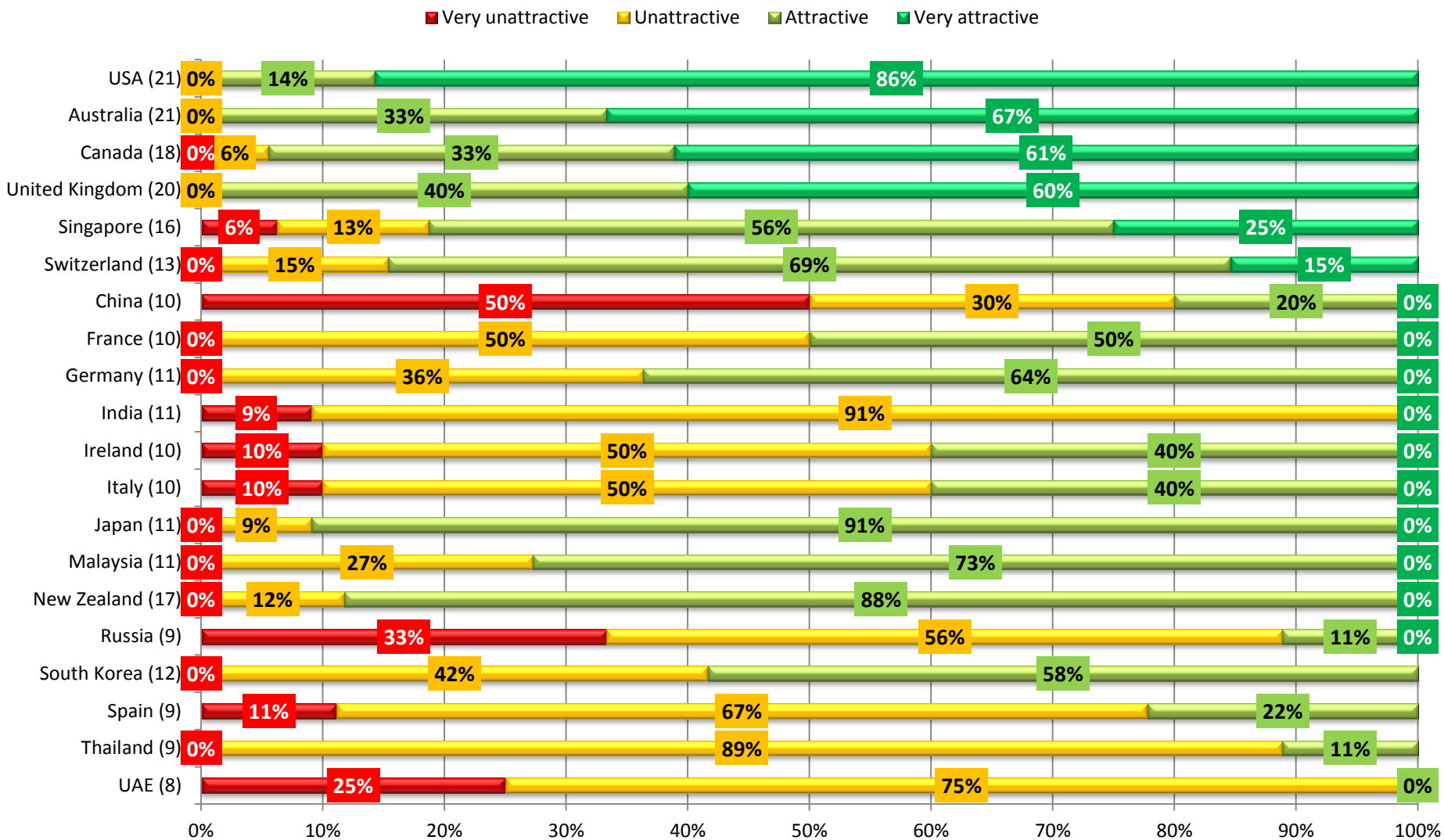
Note: Excludes respondents that indicated they 'Do not know'

Pakistani Agents



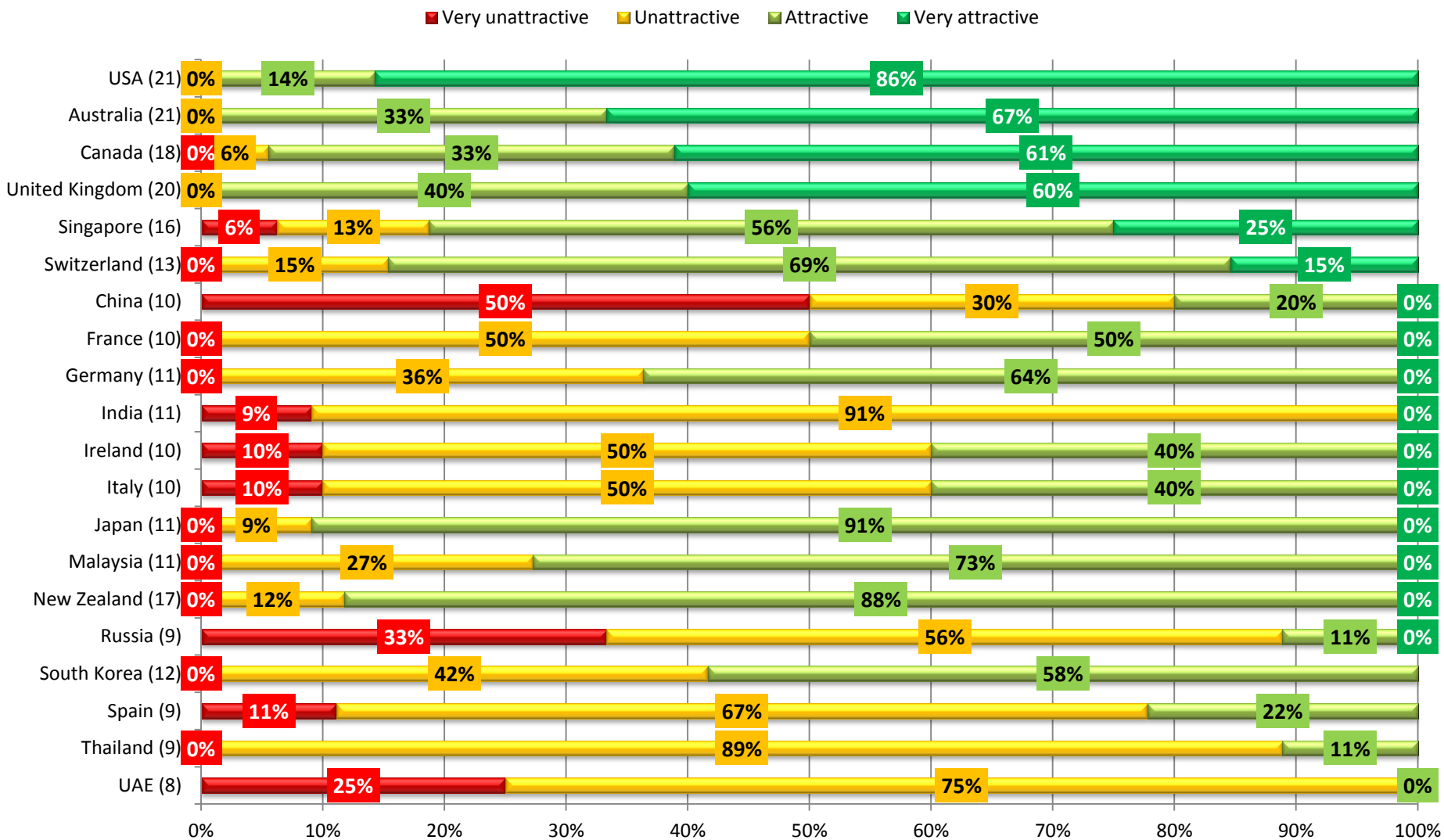
Note: Excludes respondents that indicated they 'Do not know'

Vietnamese Agents



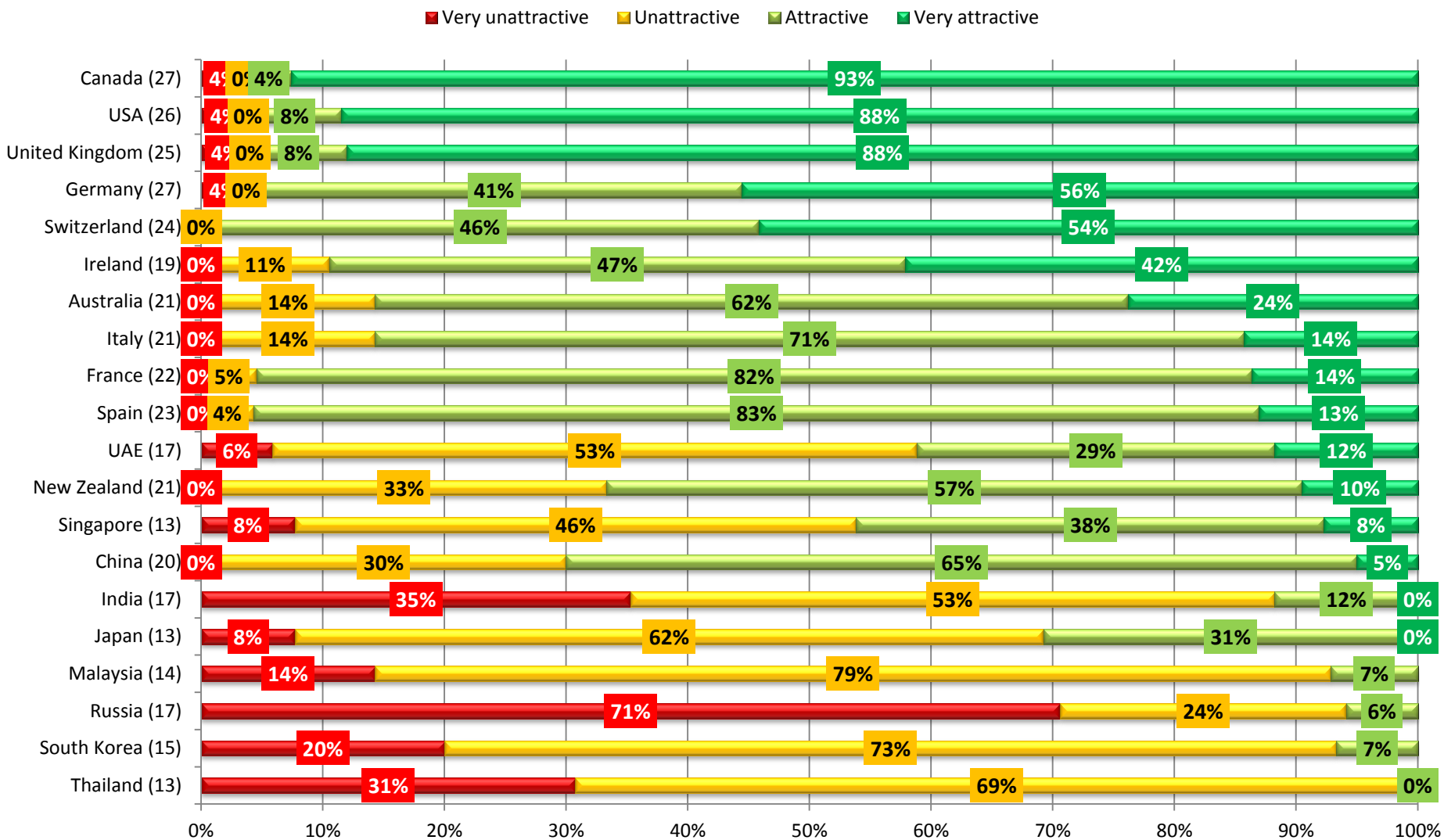
Note: Excludes respondents that indicated they 'Do not know'

Vietnamese Agents



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

Ukrainian Agents

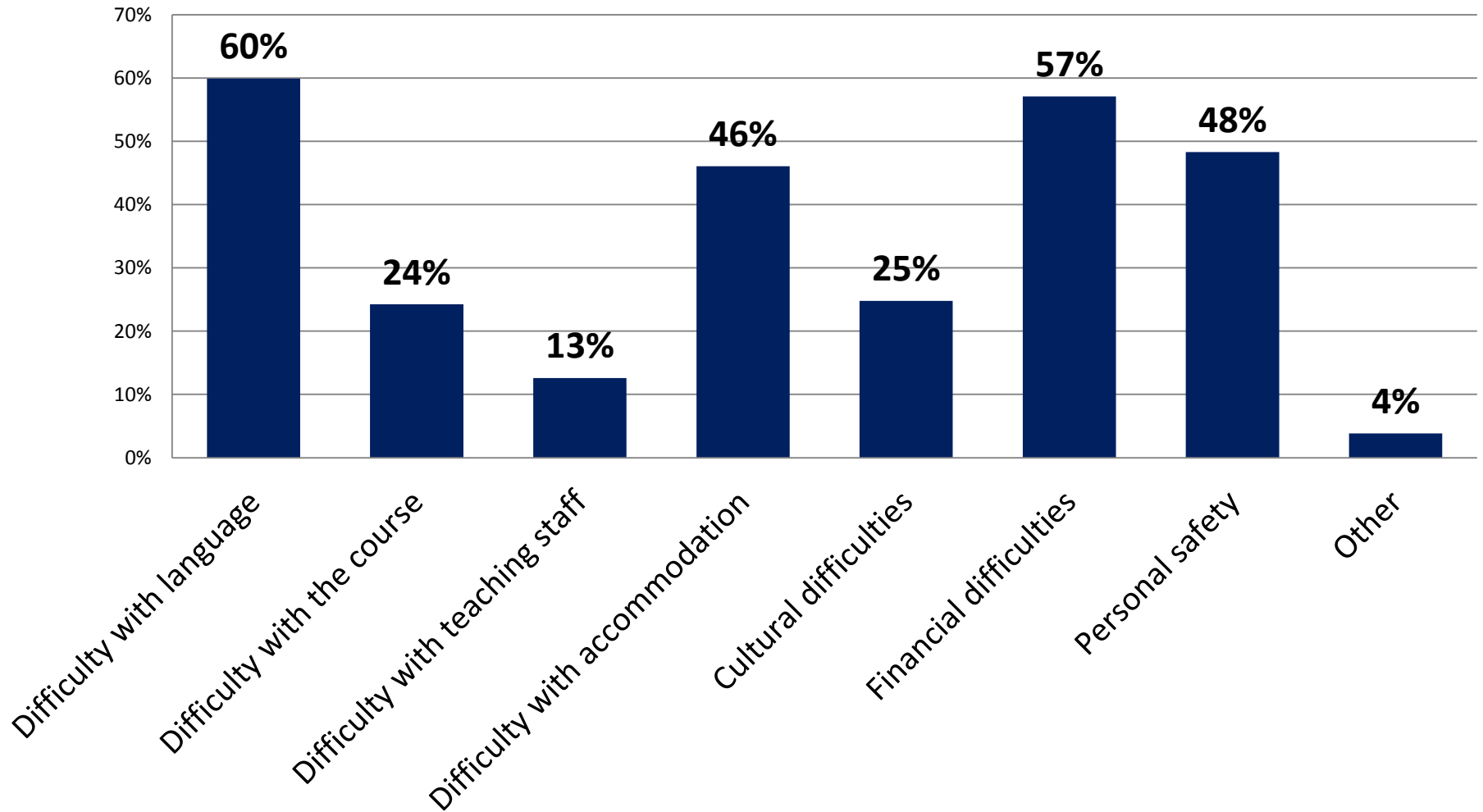


Note: Excludes respondents that indicated they 'Do not know'

Student mobility concerns/difficulties in 2014

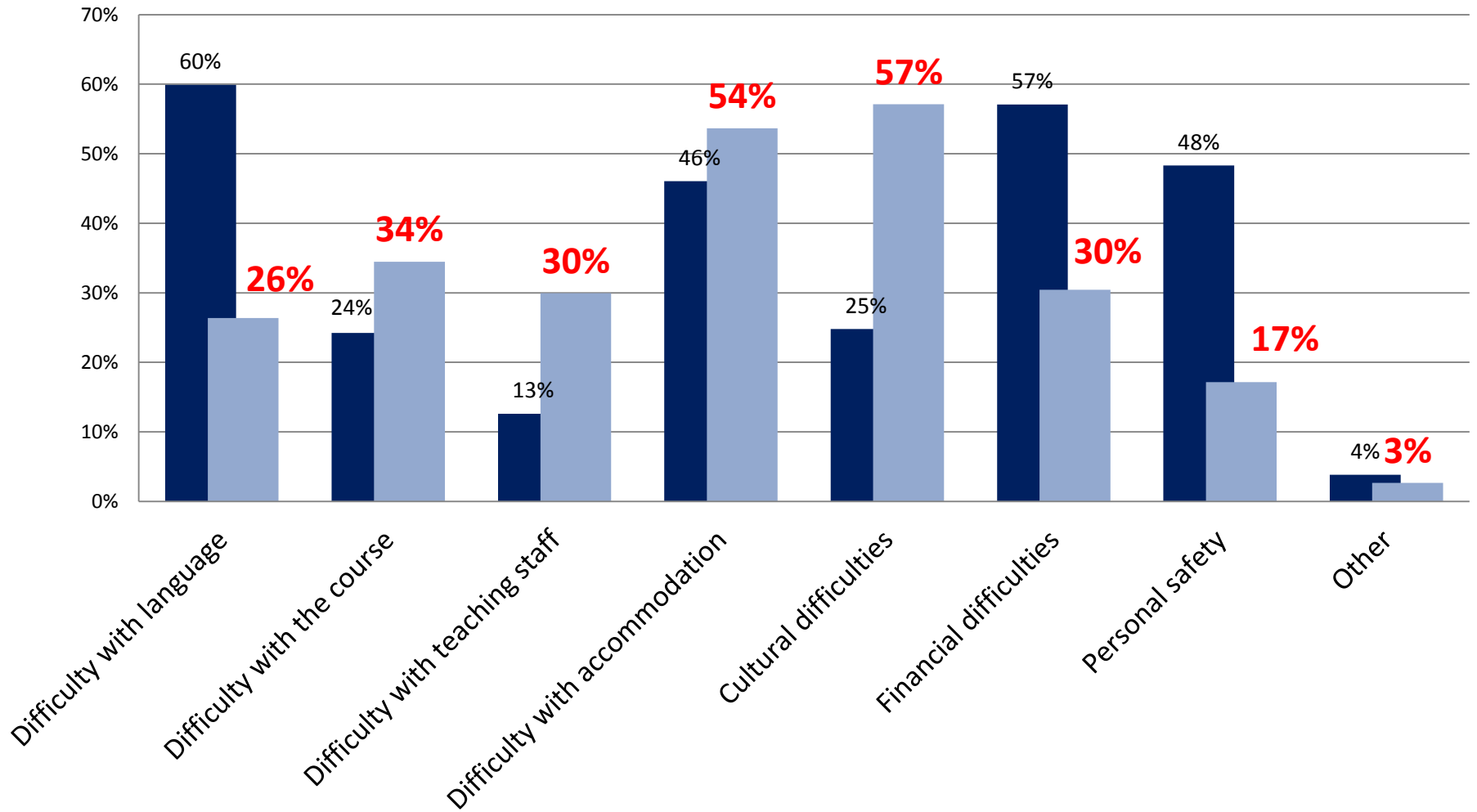


Main concerns *students and parents* have *BEFORE* departing for international study:

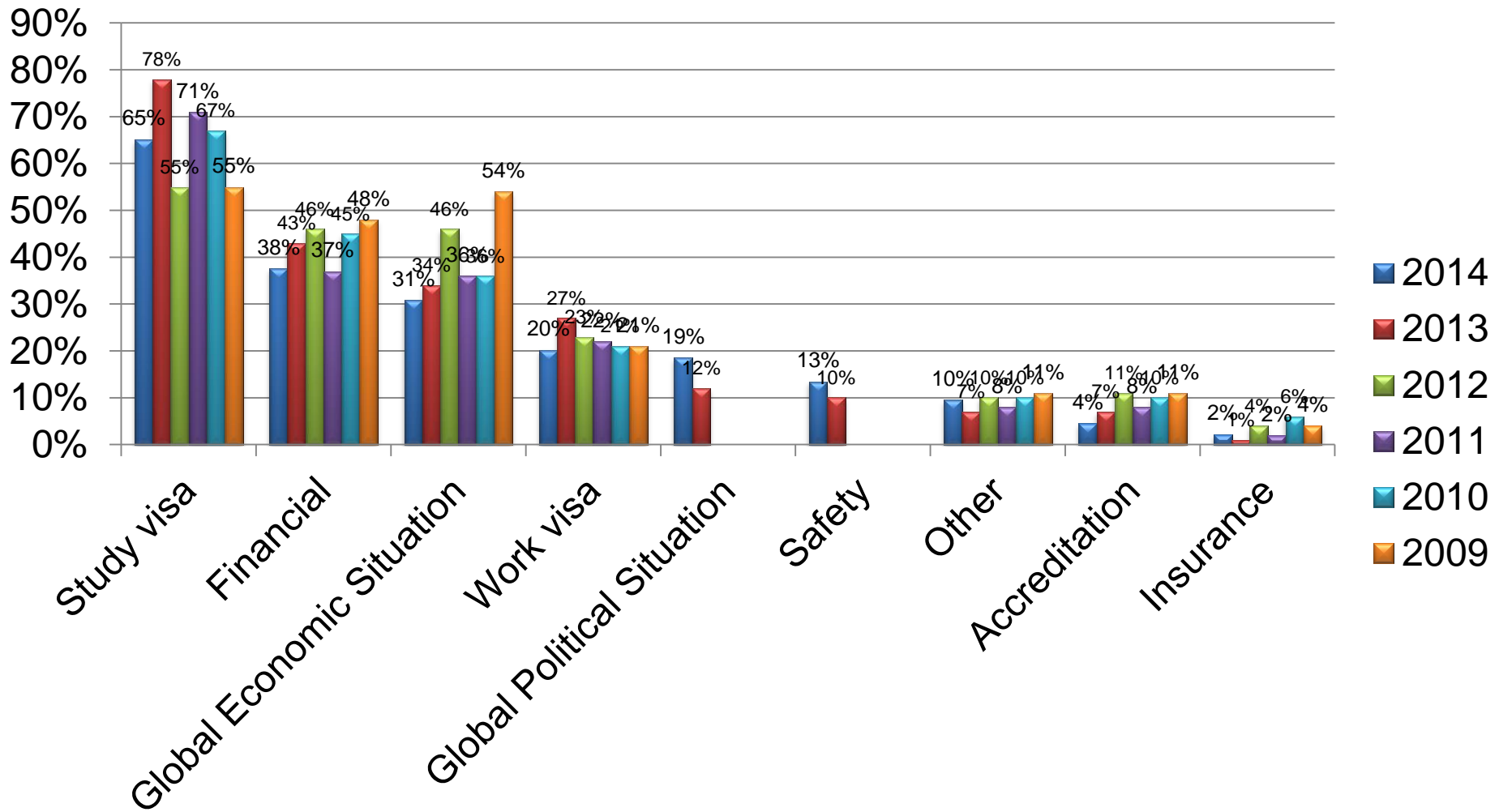


n=706

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



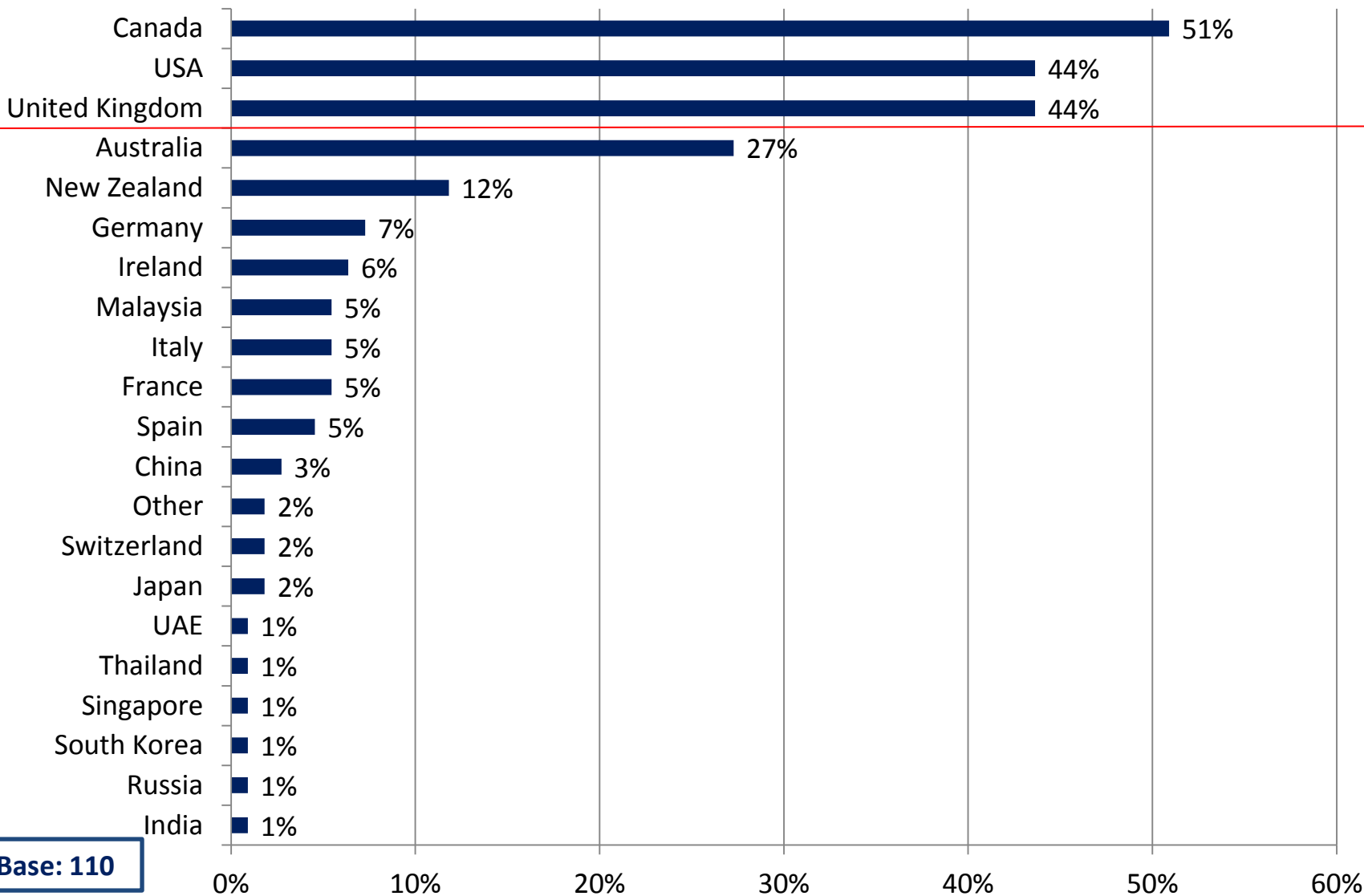
n=706



The majority of the agents think that study visa are an increasing concern in 2014.

In which countries did you experience these concerns/difficulties?

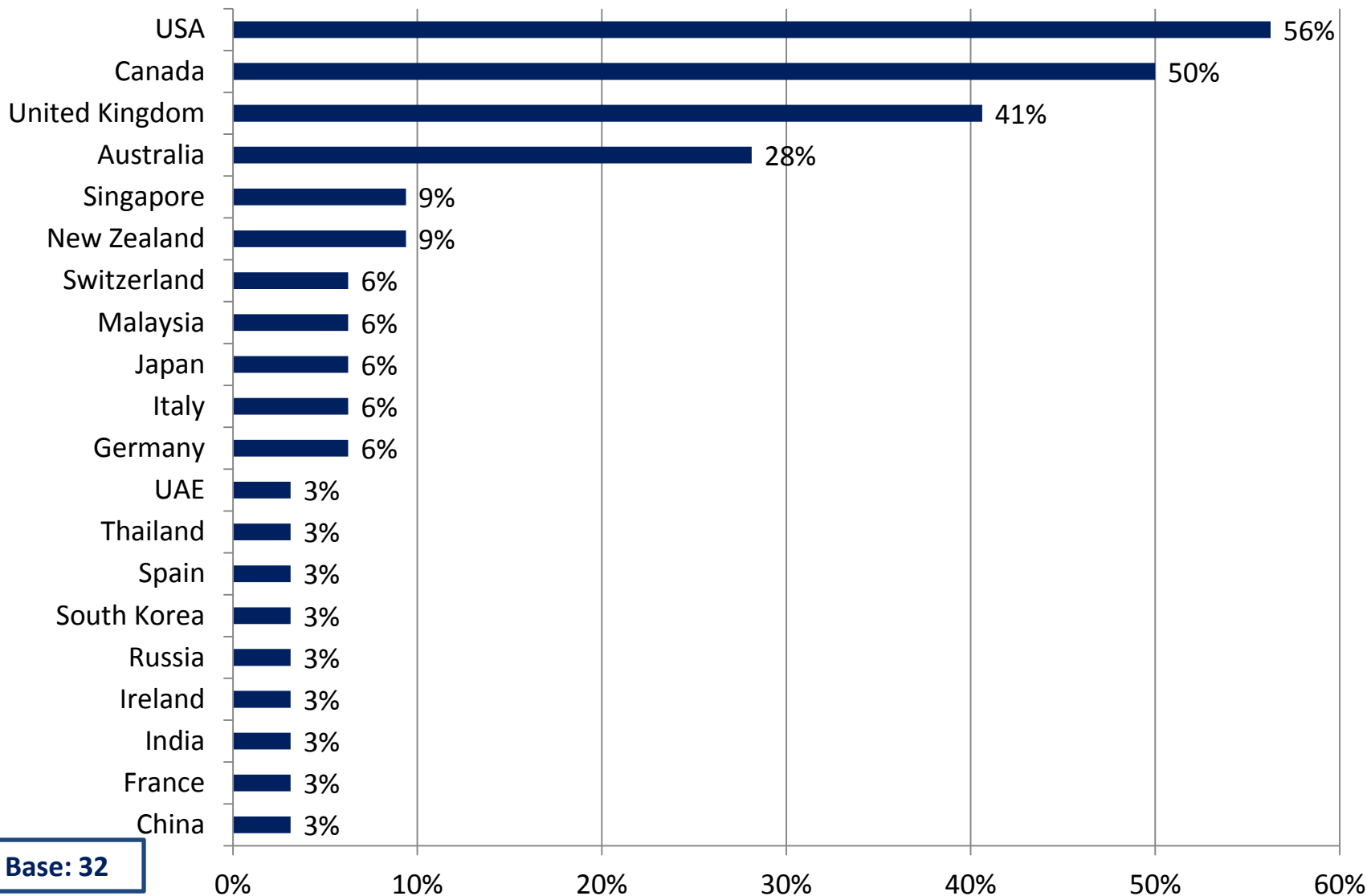
Study Visa



Base: 110

In which countries did you experience these concerns/difficulties?

Work Visa

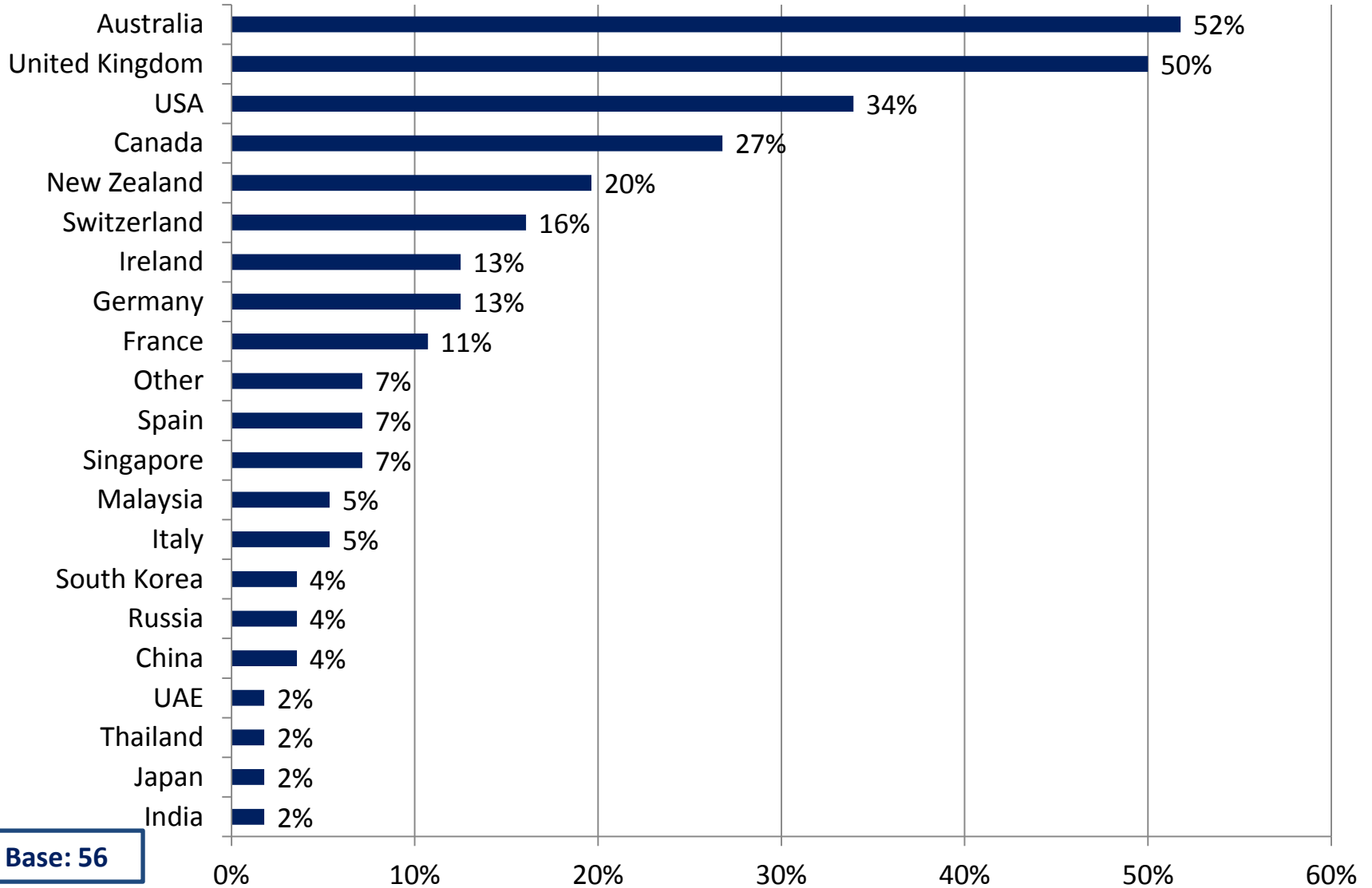


Base: 32

Note very small base number

In which countries did you experience these concerns/difficulties?

Financial

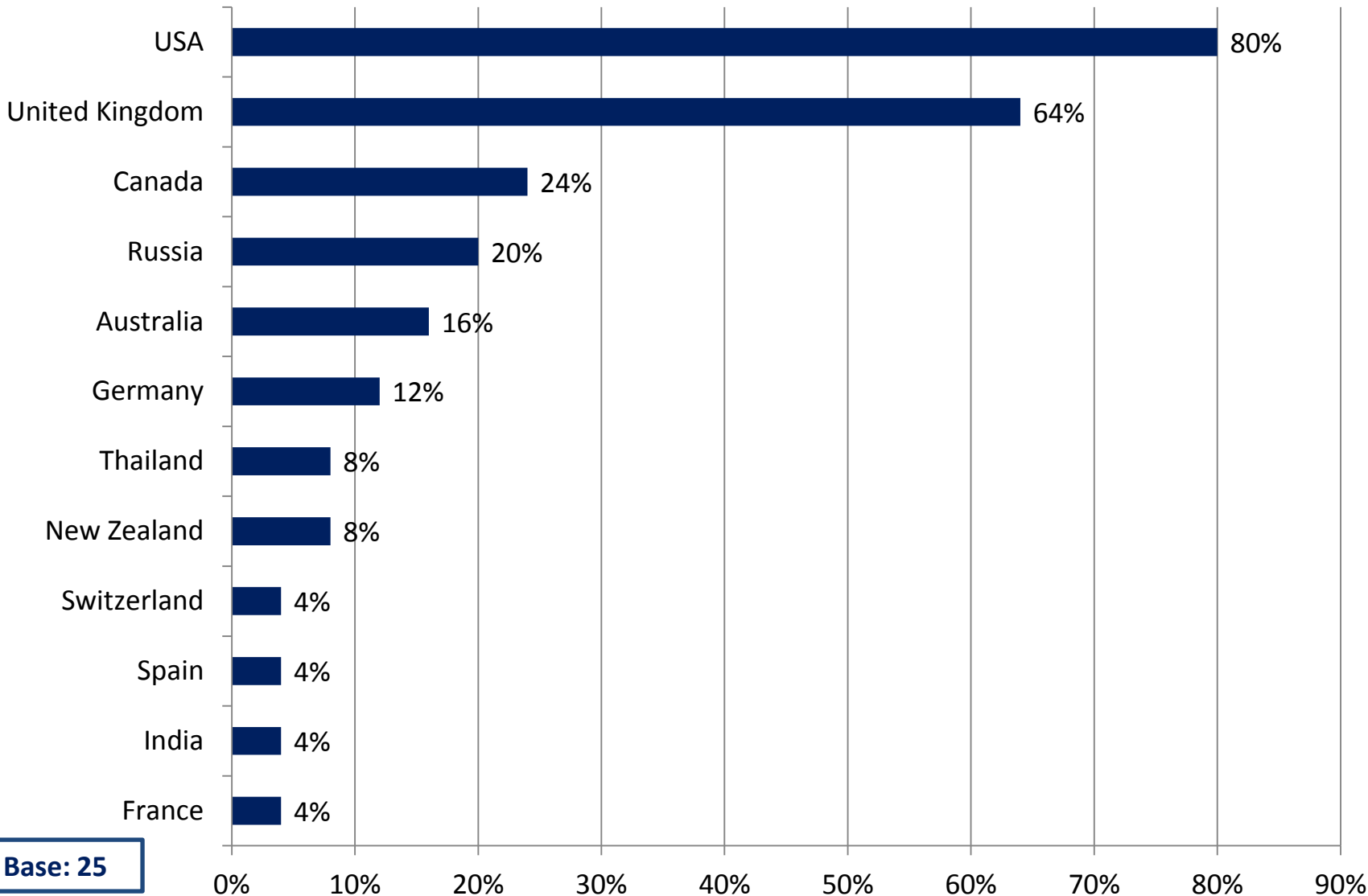


Base: 56

Note very small base number

In which countries did you experience these concerns/difficulties?

Global Political Situation



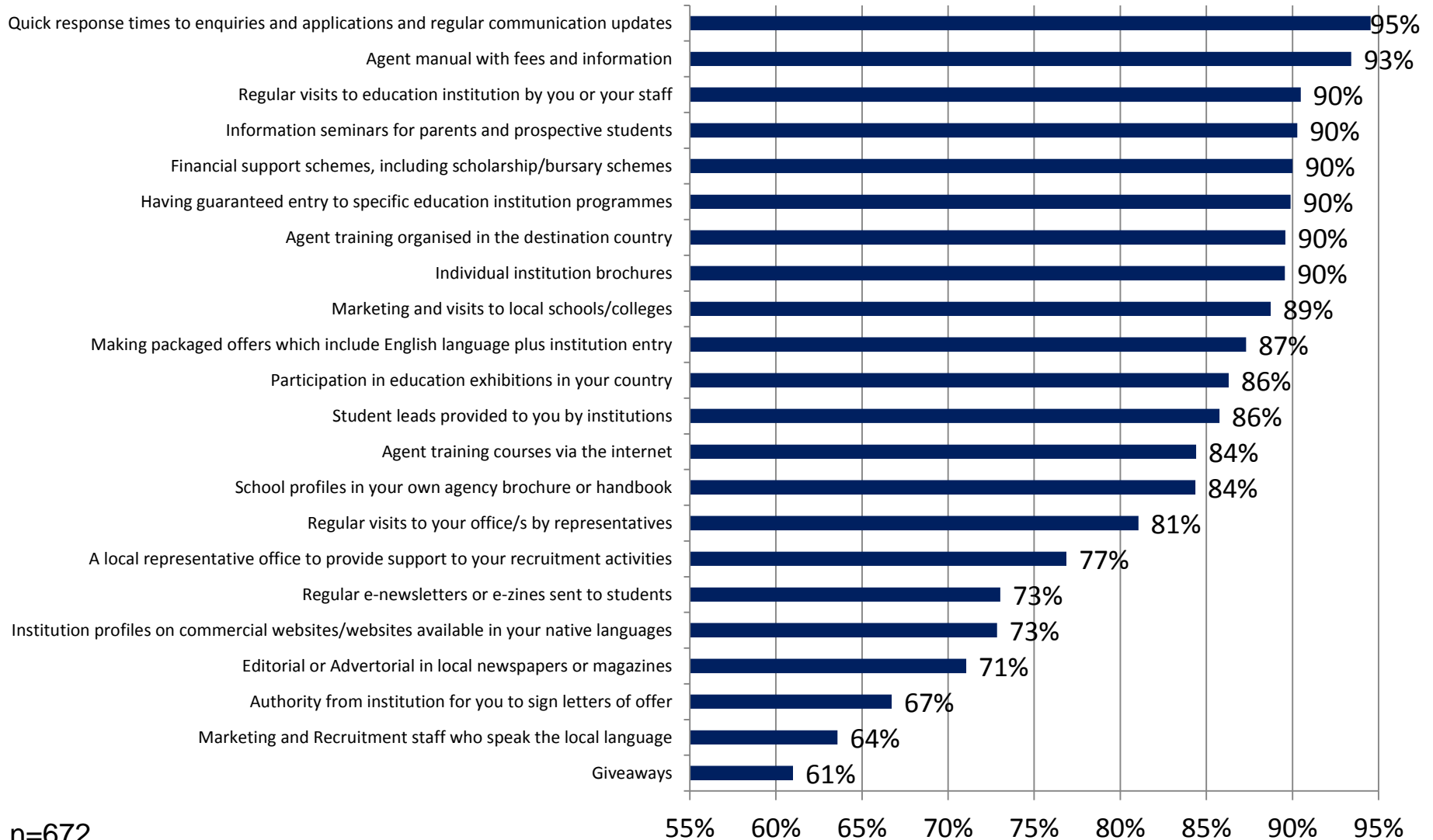
Base: 25

Note very small base number

Marketing

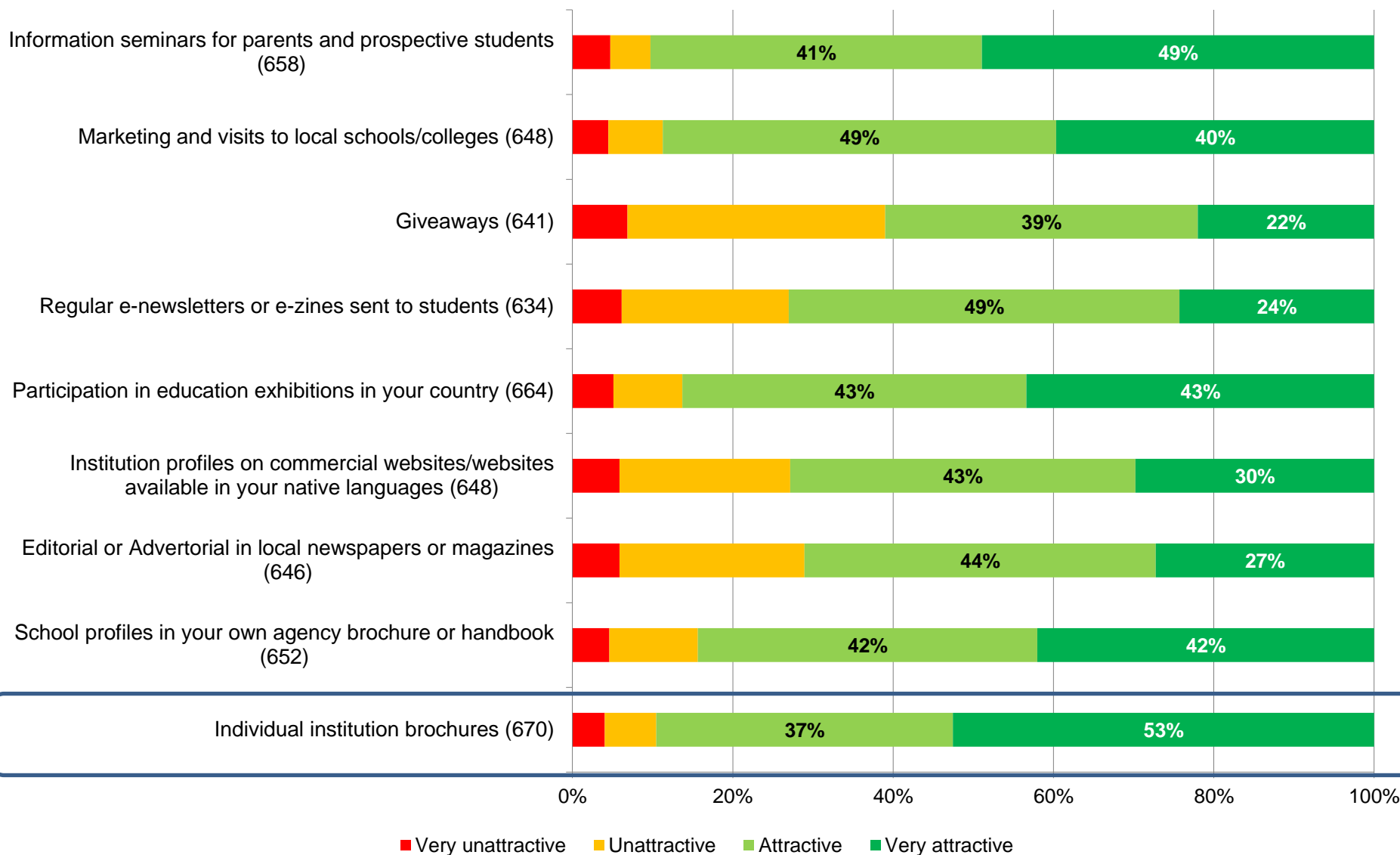


Main ingredients in a successful school/agent partnership:

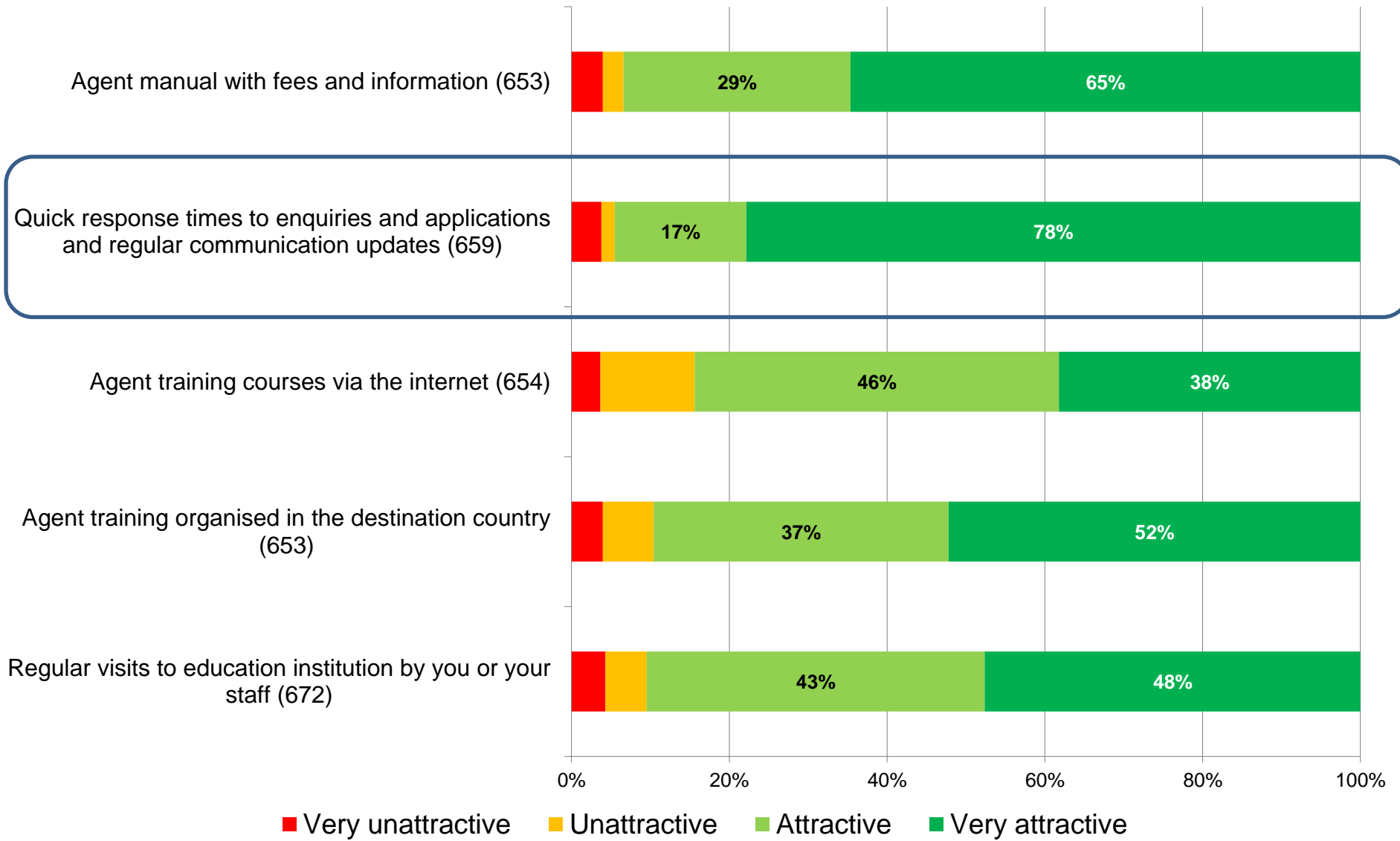


n=672

Promotional materials and campaigns



Services



Thank you!

Please leave your card for a copy of
these slides

Sarah Mines

smines@icef.com

604-838-4042

Caroline Levesque

clevesque@icef.com

819-635-5601

