

## 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



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.

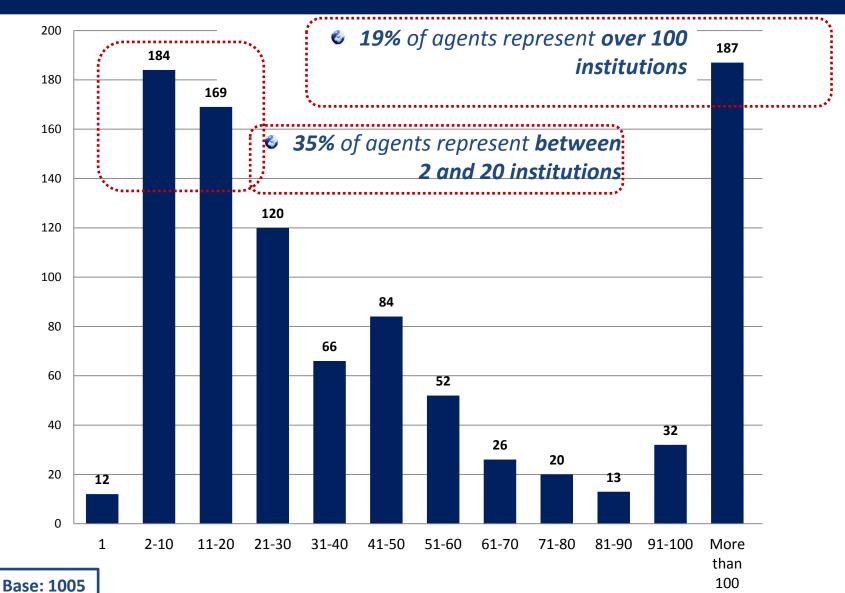
India	87
China	84
Russia	69
Brazil	59
Nepal	51
Nigeria	43
Pakistan	40
Vietnam	36
Ukraine	35
UK	29

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?



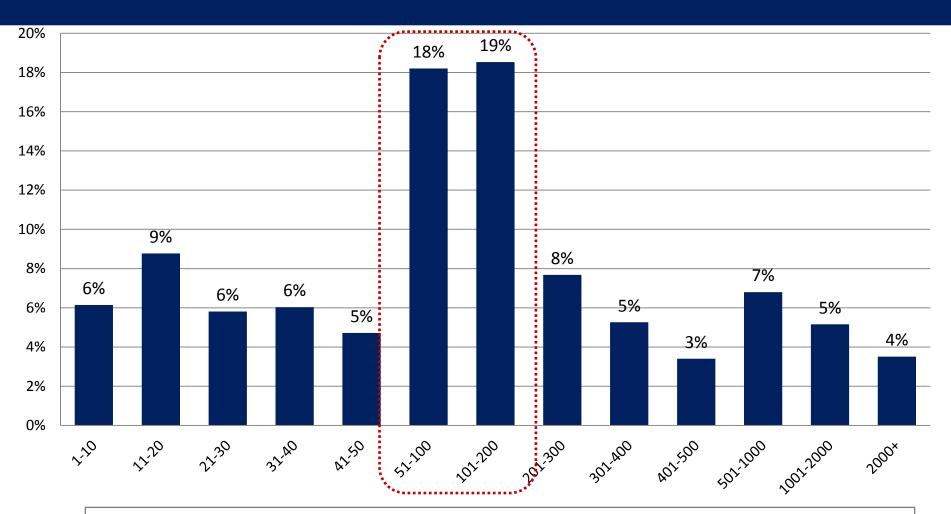


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### Size of agents – Total placements





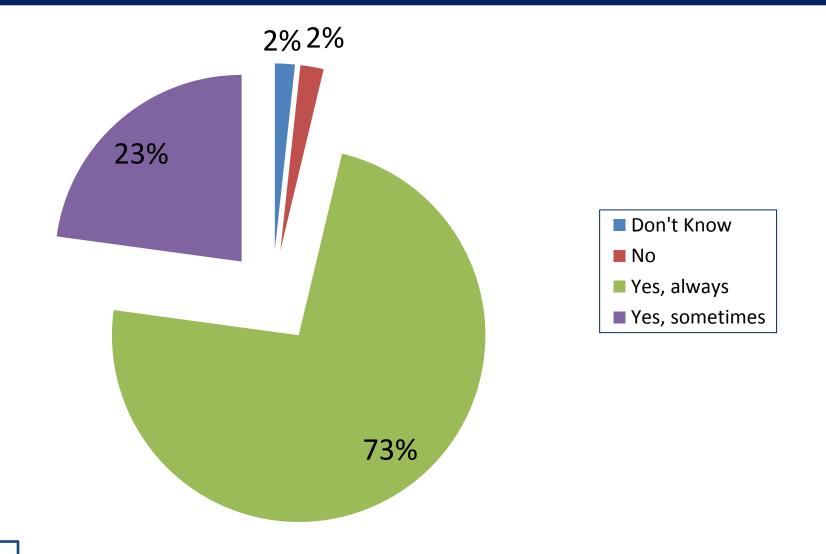
The greatest proportion of agents are placing between **51 and 200 students** annually.

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



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





Base: 696





## Scope of activity

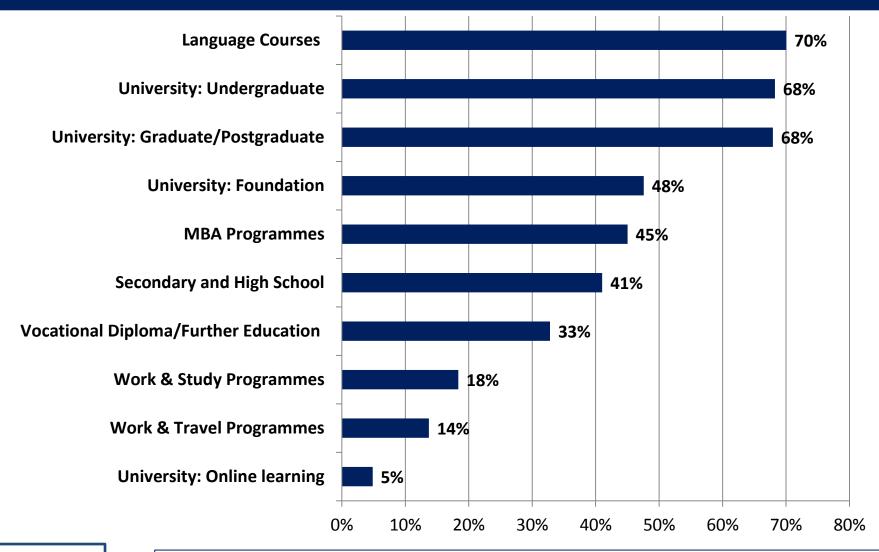






### For which types of study do you recruit students?





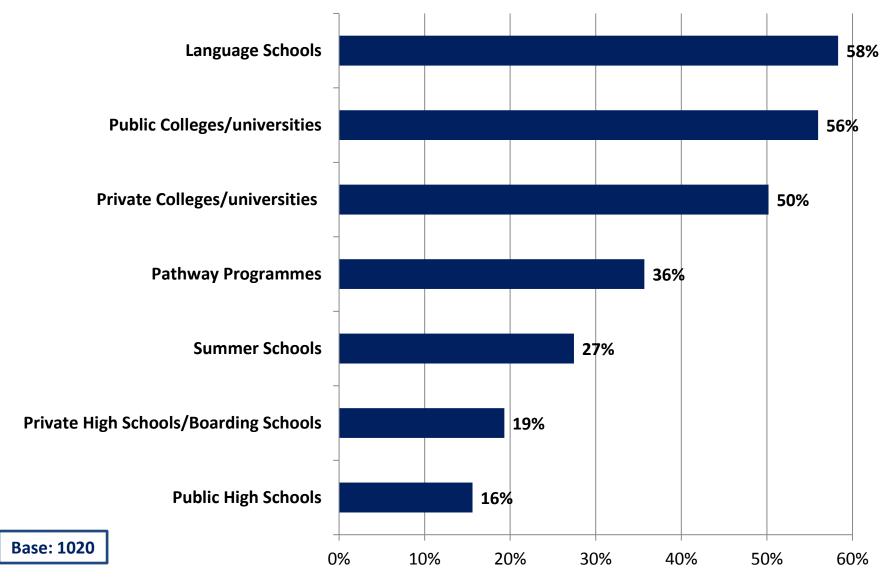
Base: 948

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



### Placing students into...

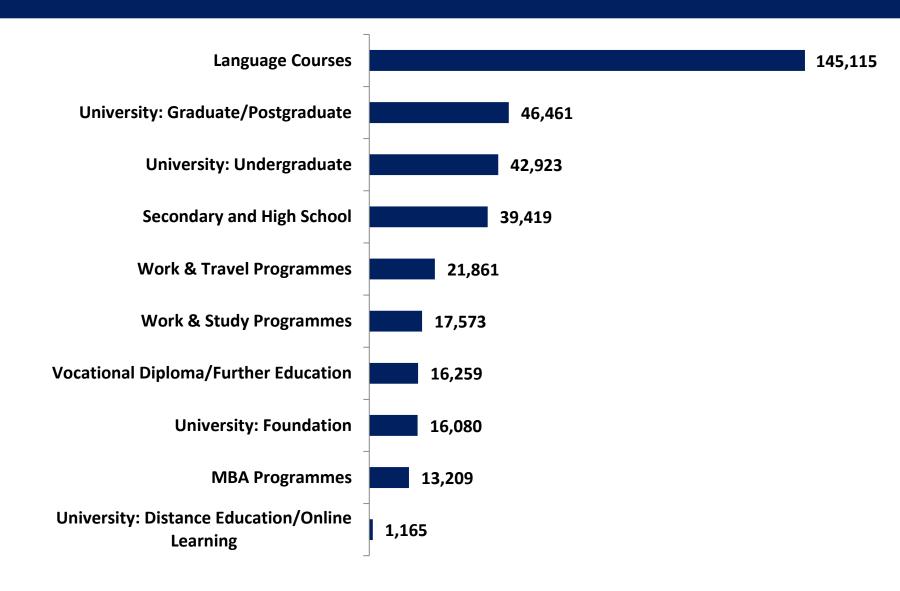




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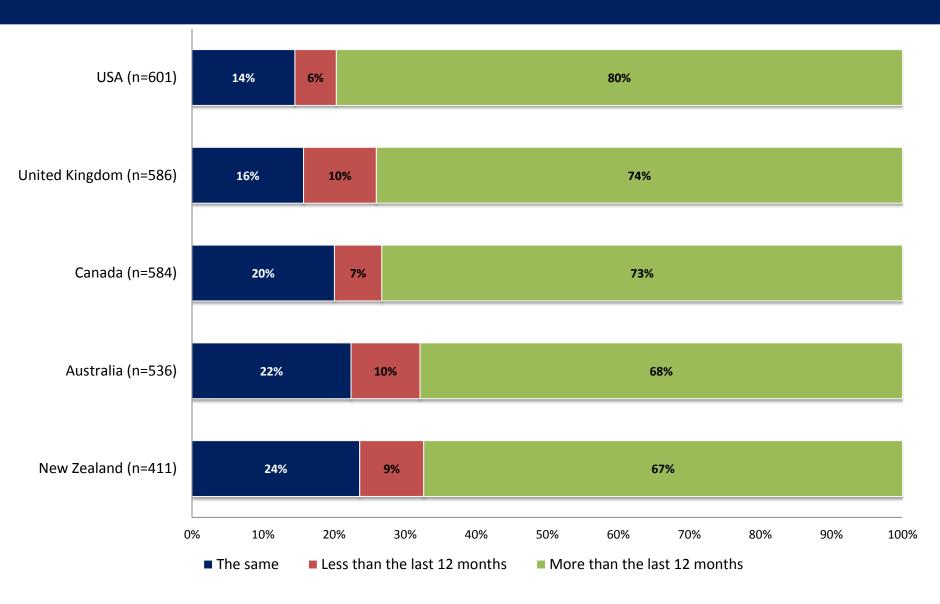
# How many students do agents expect to place in the <u>next 12 months</u>?





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

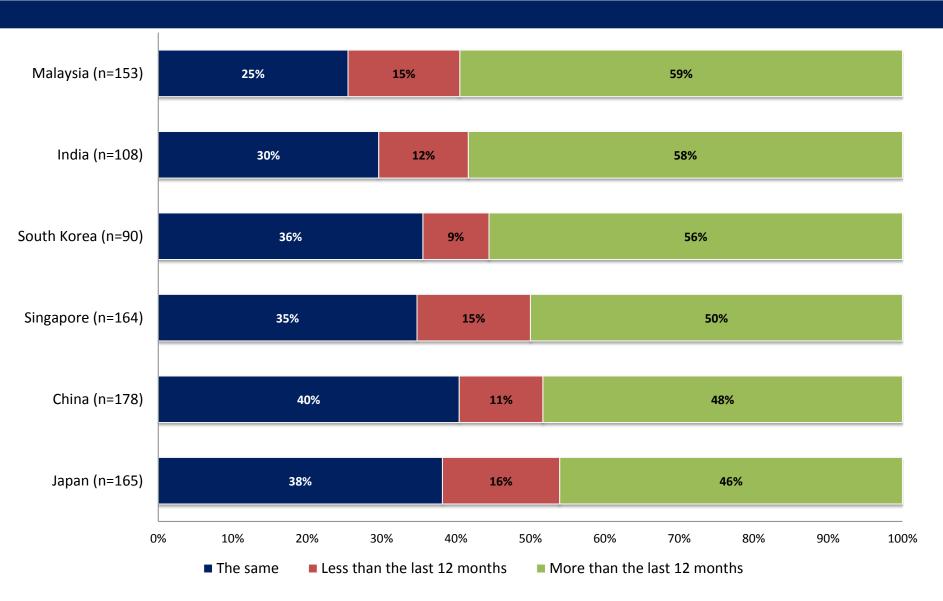






### <u>Approximately how many students do you expect to place</u> <u>overall in the next 12 month? EMERGING MARKETS</u>





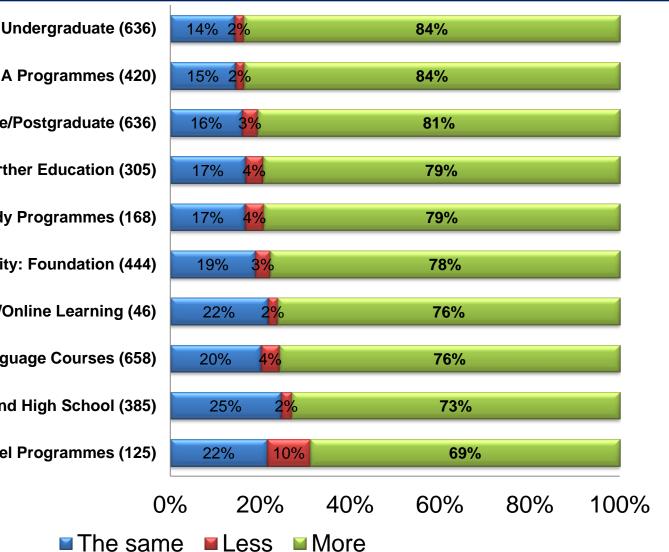
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### In the next coming 12 months do you expect to send

#### *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

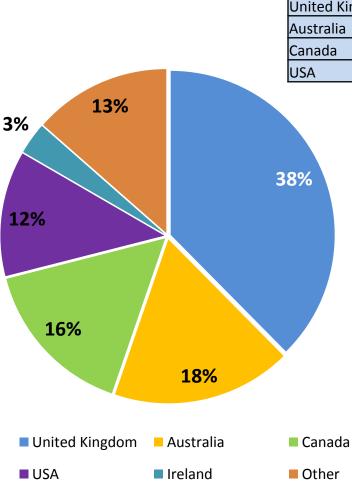








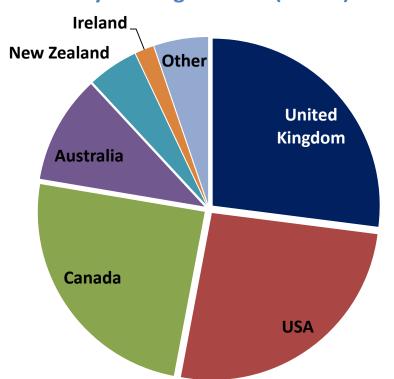
Language courses (n=673)



	% 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







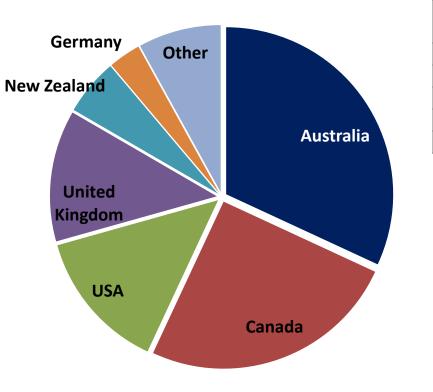
Secondary and	<b>High School</b>	(n=555)
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	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
United Kingdom	27%	1	1	1	1	1	1
USA	26%	2	2	2	2	2	2
Canada	25%	3	3	3	3	3	3
Australia	10%	4	4	4	4	4	4
New Zealand	5%	5	5	5	5	5	5





#### **Vocational diploma/Further education (n=511)**

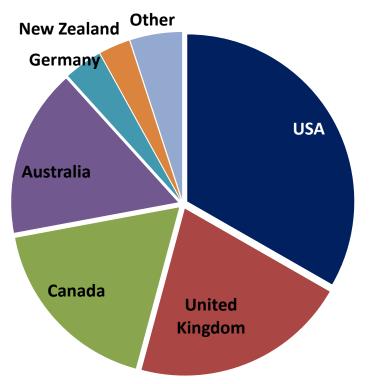


	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
Australia	32%	1	1	1	1	1	2
Canada	25%	2	2	3	3	4	4
United Kingdom	13%	4	3	2	2	2	1
USA	14%	3	4	4	4	3	3
New Zealand	5%	5	5	5	5	5	5





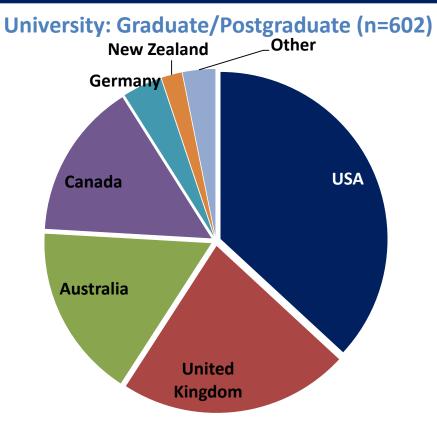
#### **University: Undergraduate (n=598)**



	% 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





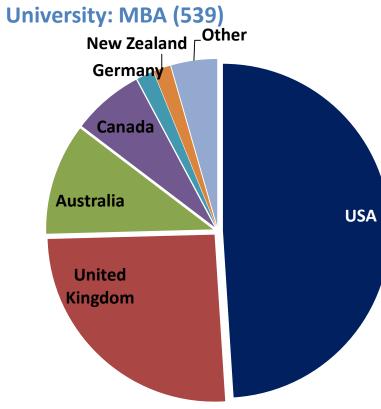


	% of Total	Rank 2014	Rank 2013	Rank 2012	Rank 2011	Rank 2010	Rank 2009
USA	37%	1	1	1	1	1	1
United Kingdom	22%	2	2	2	2	2	2
Australia	17%	3	3	4	4	3	3
Canada	15%	4	4	3	3	4	4



#### Which study destinations is best MBA Study?





	% 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

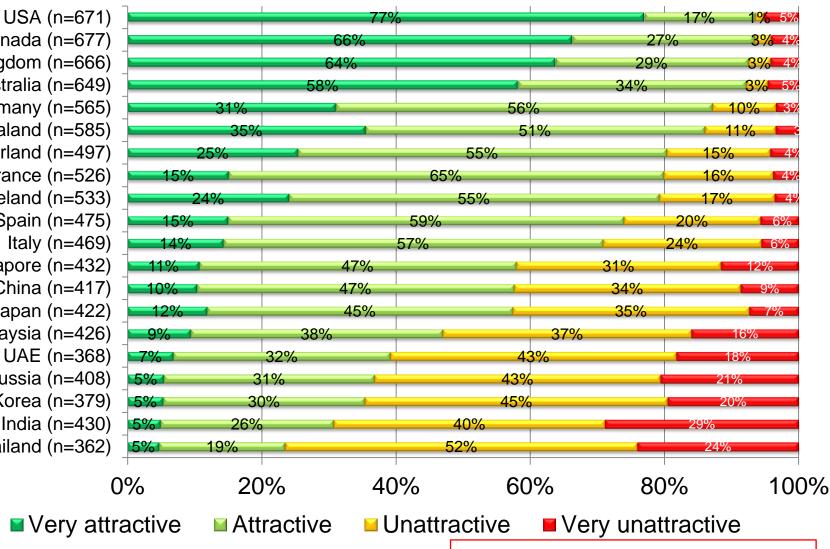








Canada (n=677) United Kingdom (n=666) Australia (n=649) Germany (n=565) New Zealand (n=585) Switzerland (n=497) France (n=526) Ireland (n=533) Spain (n=475) Italy (n=469) Singapore (n=432) China (n=417) Japan (n=422) Malaysia (n=426) UAE (n=368) Russia (n=408) South Korea (n=379) India (n=430) Thailand (n=362)

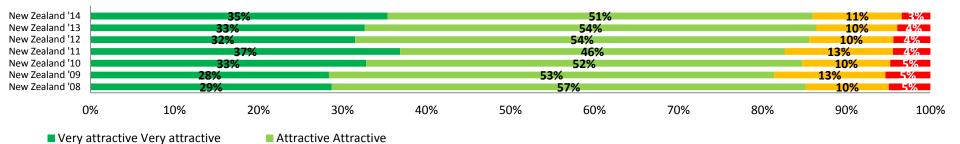


Note: Excludes respondents that indicated they 'Do not know'

Traditional markets remain top of 'attractive' list











		400/										
Thailand '14	5%	19%	52%							24%		
Thailand '13	5%	18%				51%			25%			
Thailand'12	2%	23%				48%			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%			33%			16%		
Singapore '09	10%				.0/		337	-		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%		
	9% 9%			35% 35%						21%		
Malaysia '10 Malaysia '09	9% 10%		26%	35%			39%			18%		
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%					30%				
Japan '09	159	6			51%				27%		0% 7%	
						/		/				
C	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%	
			Ve	ery attractive	Attractive	Unattractive	Very unat	tractive				



**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%



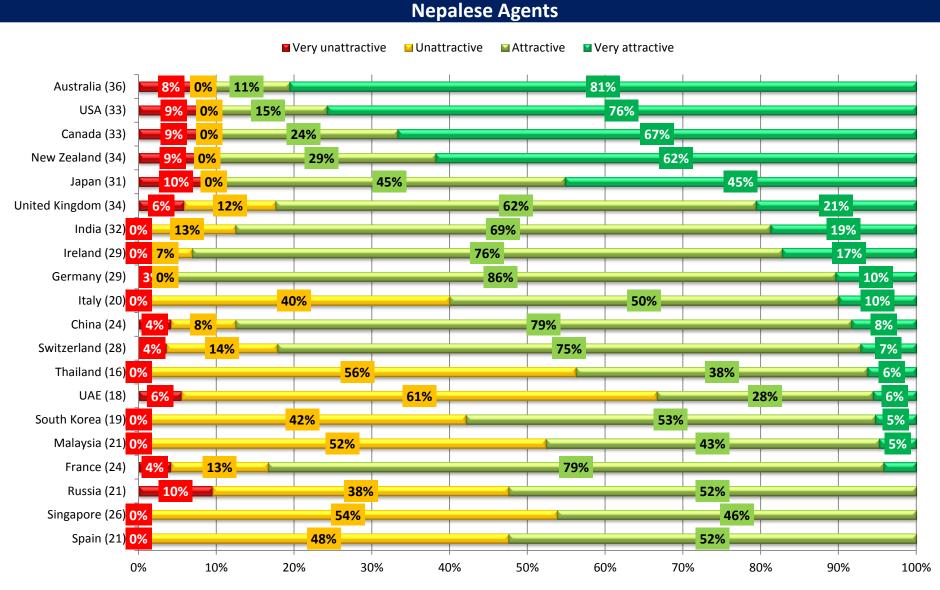


#### Very unattractive Unattractive ■ Attractive Very attractive Canada (41) 2 0% \_\_\_\_ 12% 85% Australia (40) 3 0% 13% 85% USA (41) 2 0% 15% 83% New Zealand (40) 3 0% 30% 68% Ireland (38) 0% 34% 66% United Kingdom (41) 2 0% 59% 39% 26% Spain (34) 0% 15% 59% Switzerland (28) 0% 32% 46% 21% Italy (32) 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%



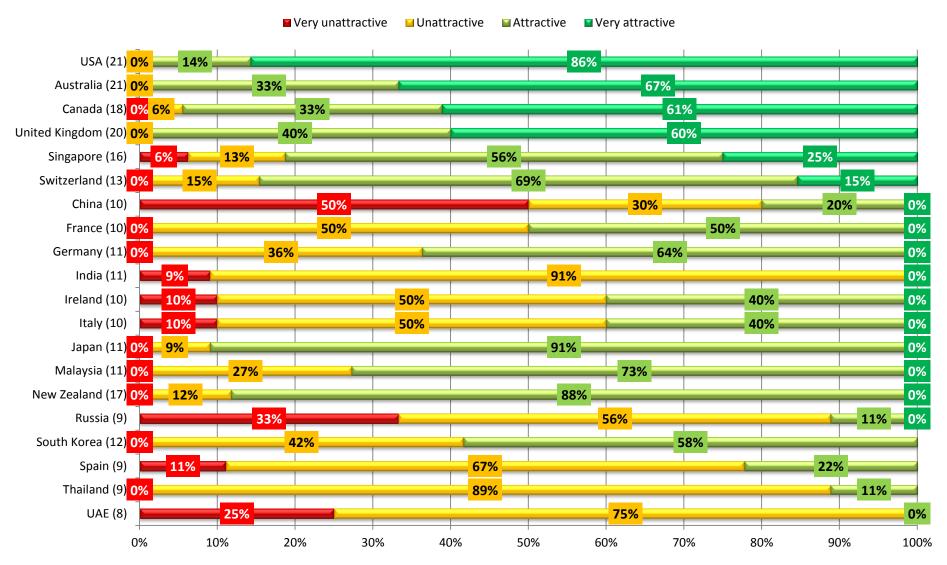


#### **Pakistani Agents** Very unattractive Unattractive Attractive Very attractive Canada (23) 0% 22% 78% Australia (24) 8% 0% 17% 75% United Kingdom (24) 09 4% 🚹 21% 75% USA (23) 49 0% 22% 74% Germany (17) 0% 47% 53% Italy (13) 0% 8% 54% 38% France (17) 6% 🖬 12% 53% 29% Ireland (21) 10% 57% 29% 5% New Zealand (21) 0% 14% 29% 57% 69% Switzerland (16) 0% 6% 25% 47% South Korea (15) 0% 33% 20% China (18) 0% 22% 67% 11% Malaysia (20) 0% 20% 70% 10% Russia (14) 7% 50% 36% 7% Thailand (14) 43% 36% 7% 14% 6% Spain (17) 0% 76% 18% India (14) 86% 14% 0% Japan (14) 7% 43% 50% Singapore (13) 0% 38% 62% UAE (14) 21% 36% 43% 0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%





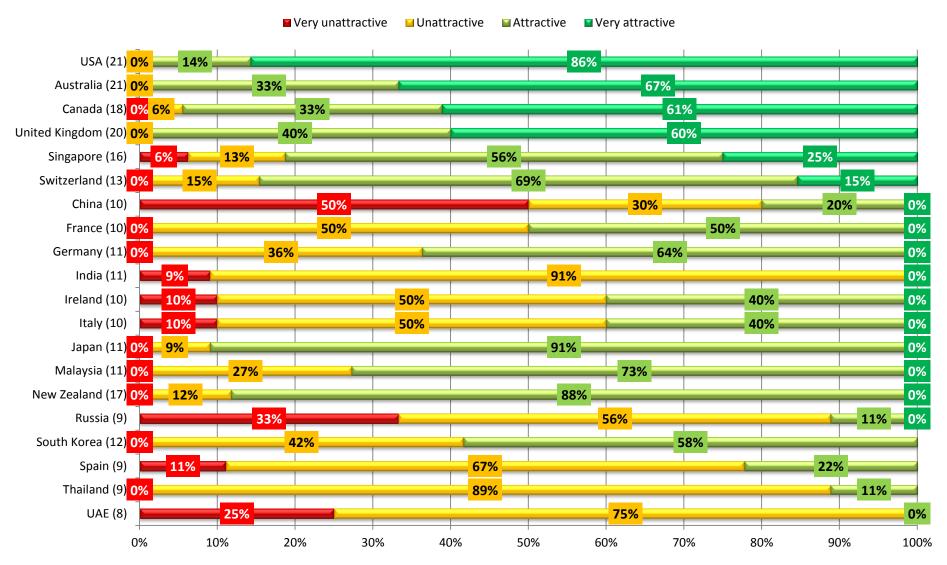
#### Vietnamese Agents







#### 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

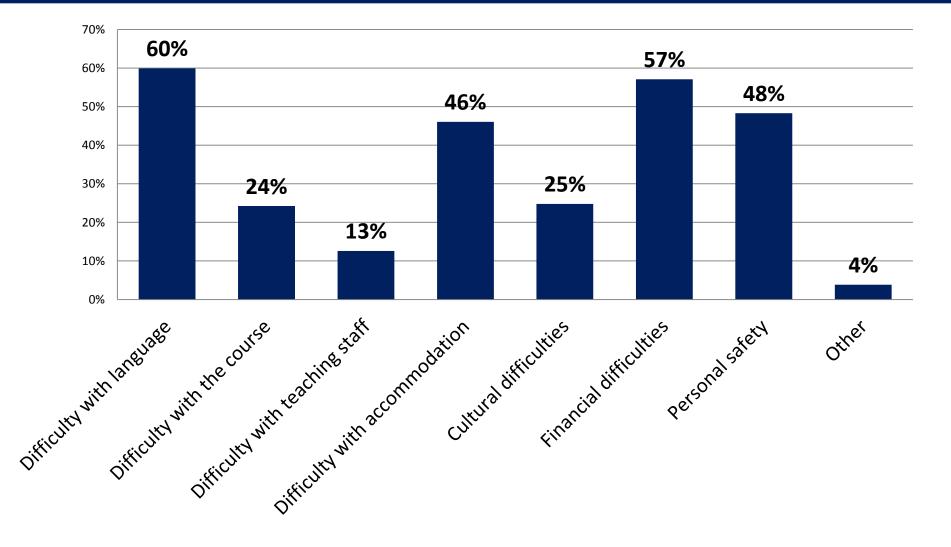






Main concerns **students and parents** have BEFORE departing for international study:

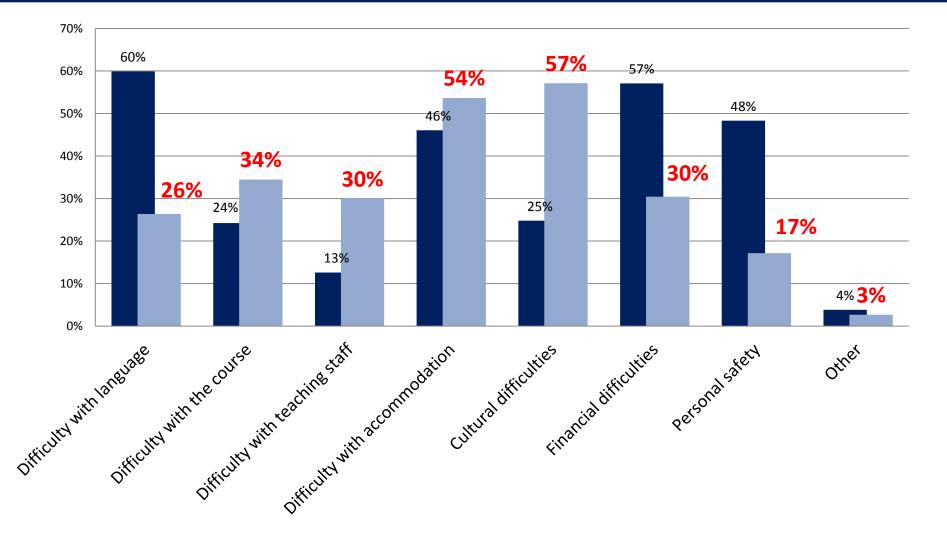






Main concerns **students and parents** have BEFORE AND AFTER departing for international study:

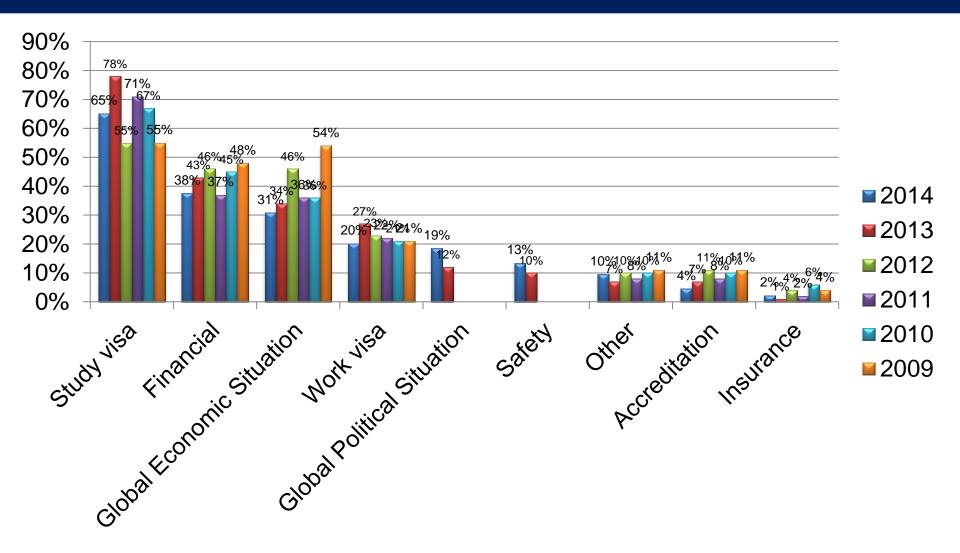






#### Student mobility concerns year-on-year 2009-2014:





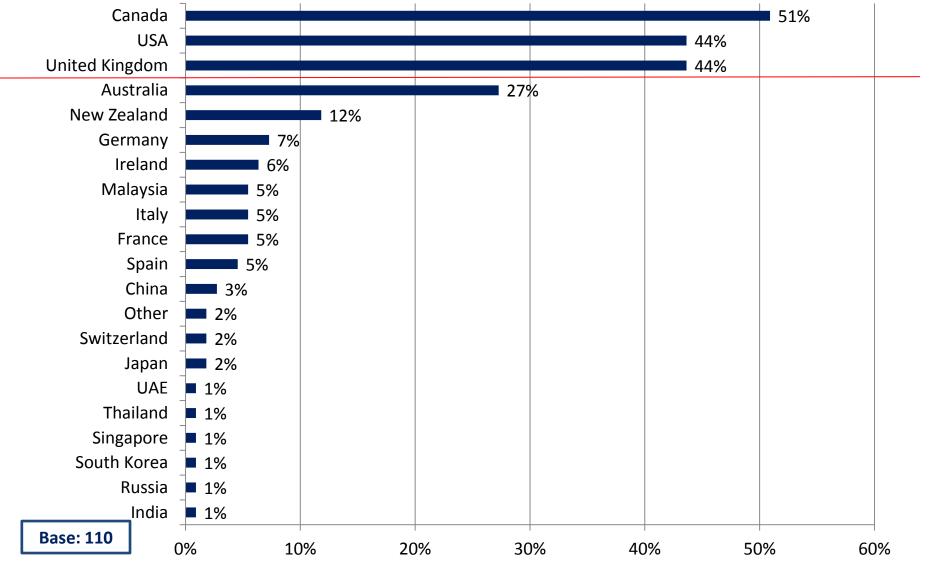
The majority of the agents think that study visa are an increasing concern in 2014.



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



#### Study Visa

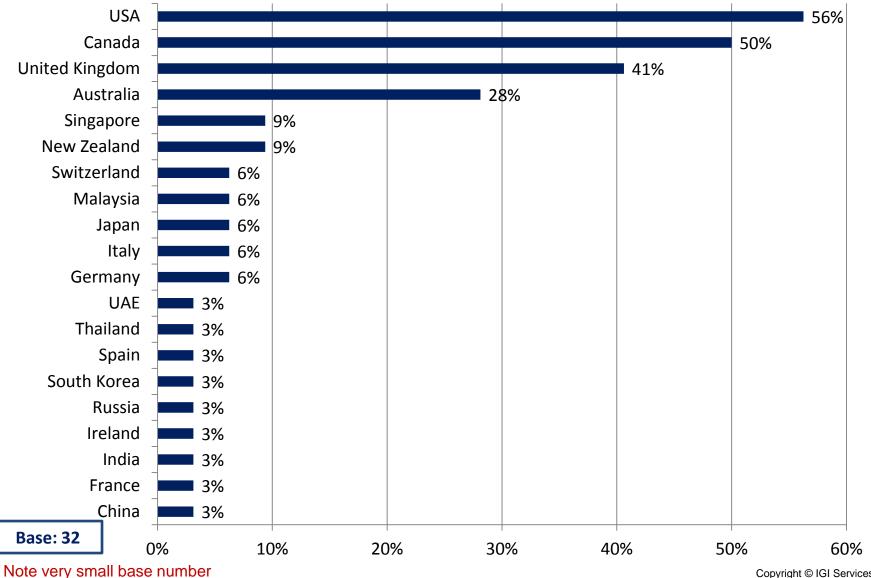




### concerns/difficulties?



#### Work Visa



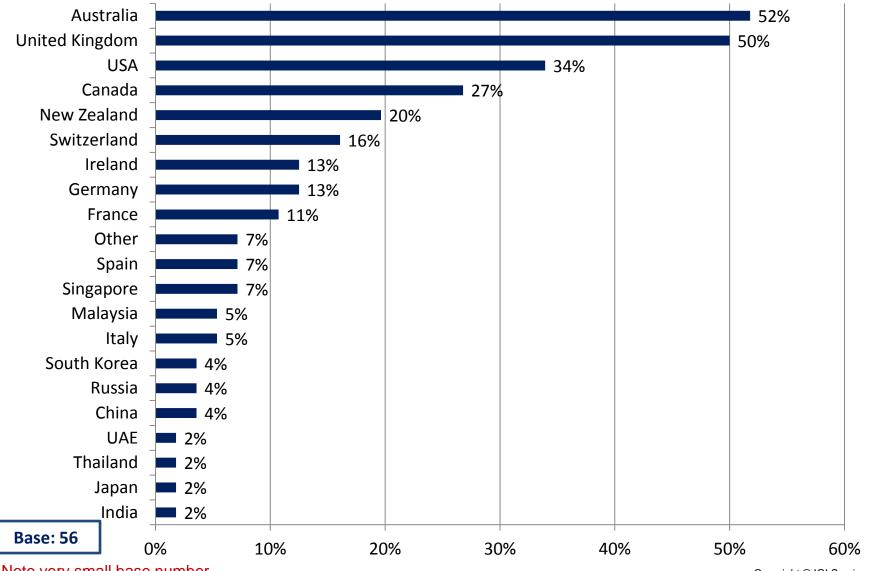
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### <u>concerns/difficulties?</u>



#### Financial



Note very small base number

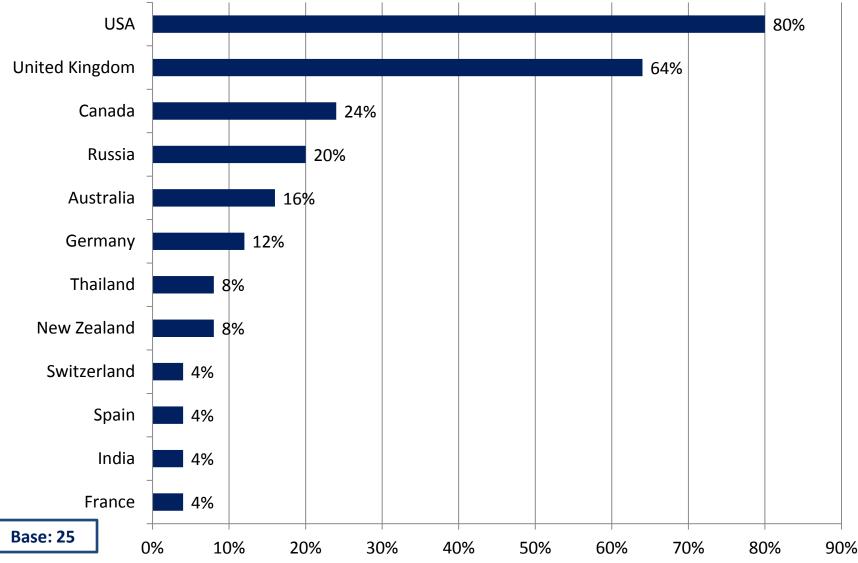
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### <u>concerns/difficulties?</u>

## Global Political Situation





Note very small base number

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# Marketing

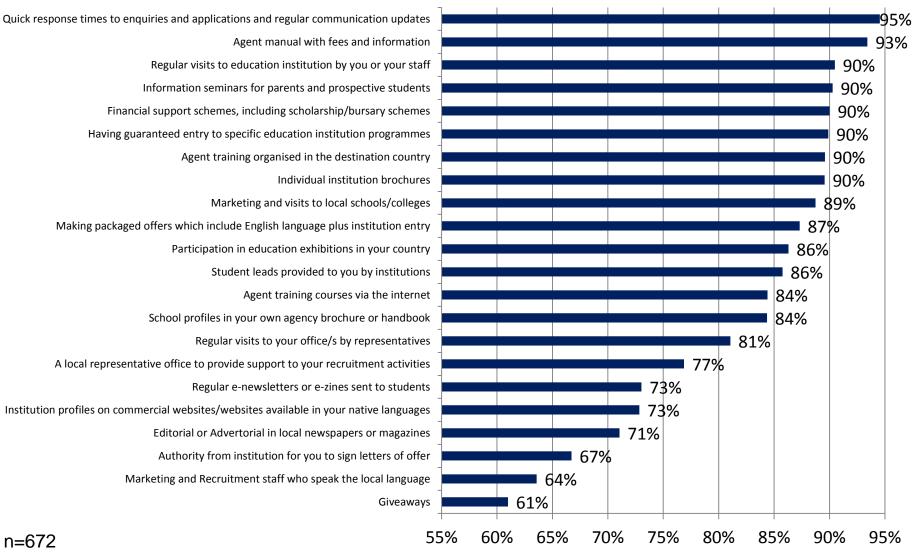




### Main ingredients in a successful school/agent partnership:



n=672

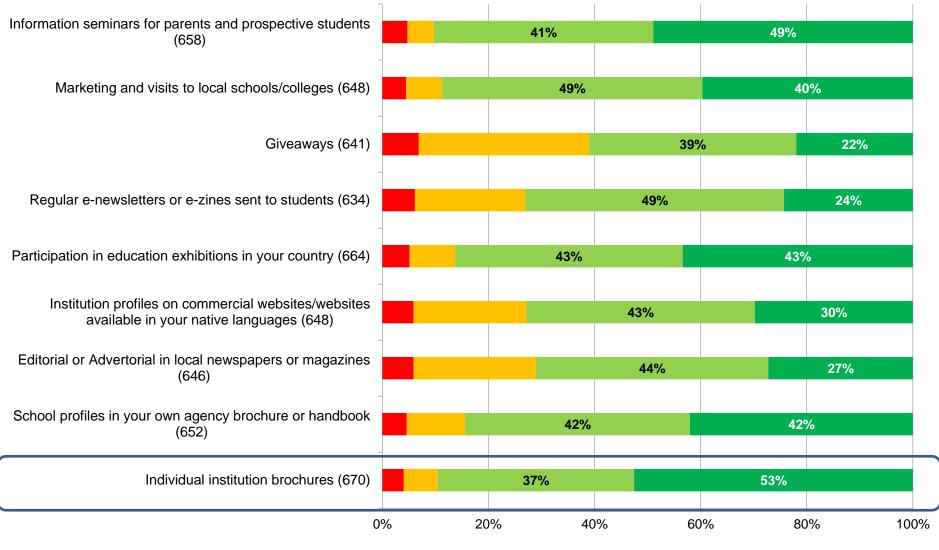


Agent manual with fees and information Regular visits to education institution by you or your staff Information seminars for parents and prospective students Financial support schemes, including scholarship/bursary schemes Having guaranteed entry to specific education institution programmes Agent training 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





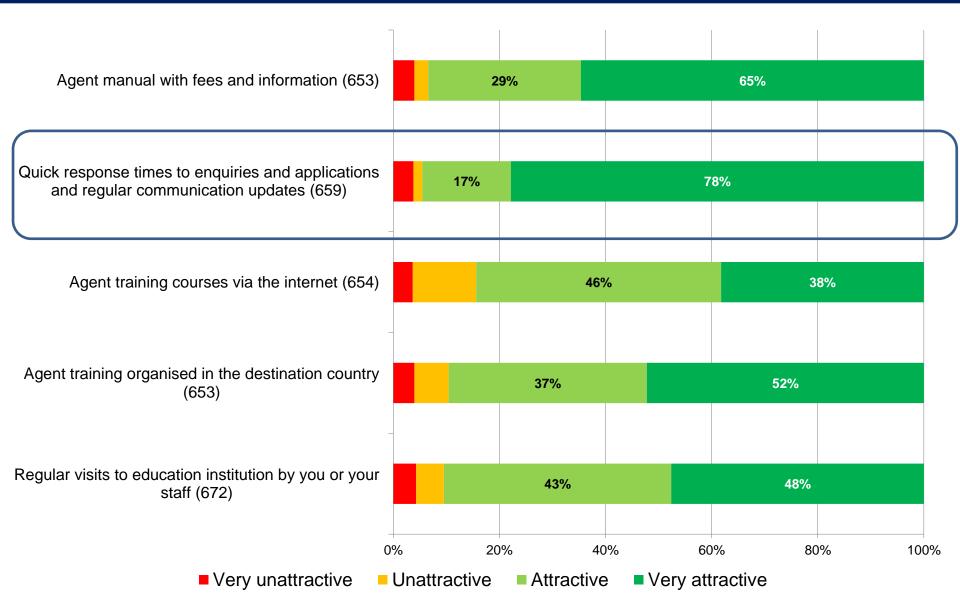
#### Promotional materials and campaigns







#### Services





*D***-graduate** INTERNATIONAL INSIGHT part of the Tribal Group plc

www.icef.com

www.i-graduate.org

### 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

