

Marketing BC Education

BC International Education Marketing Roundtables

February 25th - March 1st, 2013

Today's Agenda

- 1. Introductions**
- 2. International Education Context**
- 3. Education Marketing Manager Presentations**
- 4. Education Marketing Manager Roles and Responsibilities**
- 5. Roundtable Discussion**
- 6. Next Steps**
- 7. Contact Information**

Global Trends in International Education

- Currently over 3.3 million students are studying internationally
- Expected to grow to 7.2 million by 2025
- Close to \$3T industry globally
- Historically, people 'voted with their feet' - pursuing education in English-speaking countries
- Top destinations have been US, UK, Canada, New Zealand and Australia
- Canada currently has 5% of global market share

Global Trends in International Education, cont'd

- But...competition is intensifying....
 - 10 years ago...could you imagine French or German universities would offer courses in English?
 - Canada is losing ground as competition intensifies from nations such as France, Germany, China and Singapore, to name just a few examples
 - These countries are now choosing to offer more programming in English and more aggressively pursue the same markets

International Education in Canada

- International education in Canada is somewhat unique because education is a provincial responsibility and international trade, including immigration, is a federal responsibility.
- There has been increased interest in international education at the national level in recent years.
- Federal Government international education initiatives include:
 - Development of the Canada Brand
 - Organization/coordination in international education events such as NAFSA
 - Appointed a federal Advisory Panel on International Education that submitted a report in August 2012
 - Canada is also developing a new national International Education Strategy

International Education – a key sector in the BC Jobs Planand here's why:

- In 2010, international education in BC generated:
 - \$1.8B in spending
 - \$1.2B Gross Domestic Product (GDP)
 - 22,000 jobs
 - \$70M in government tax revenue



- Each 10% increase in international students generates another \$100M in GDP, almost 1,800 jobs and around \$6M in government revenue
- 1 million job openings over the next 10 years, but only 650,000 emerging from school system

100,700 international students currently in BC:

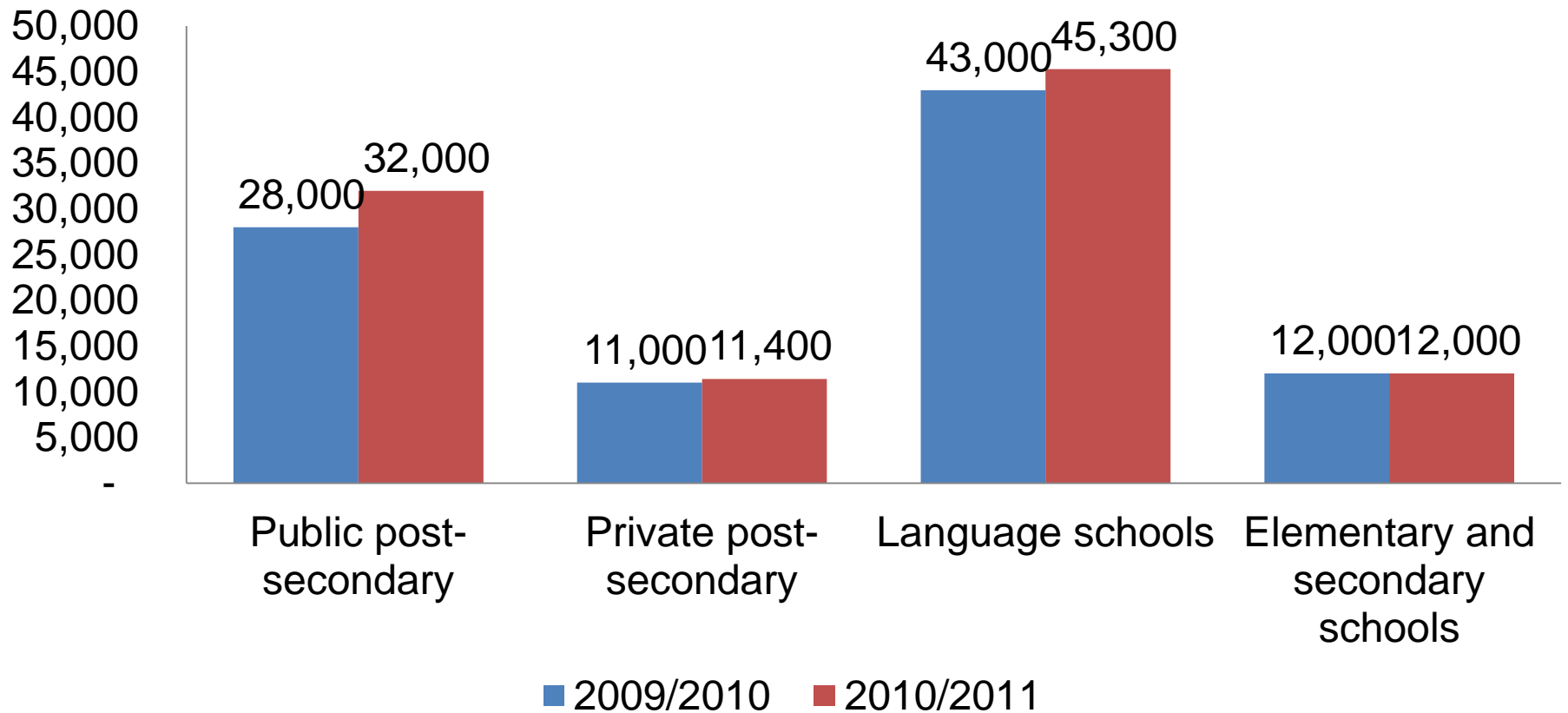
- 12,000 in K-12
- 32,000 in public post-secondary
- 11,400 in private post-secondary
- 45,300 in private Languages Canada member schools

Top Sources (2011):

- China
- South Korea
- Japan
- Brazil
- Saudi Arabia
- Mexico
- Taiwan
- India
- United States
- Switzerland

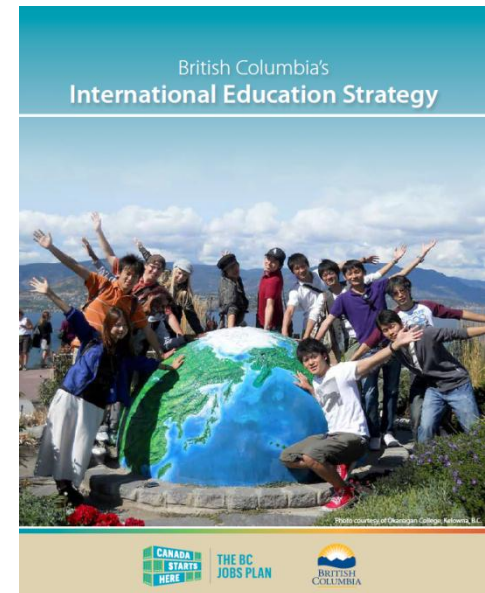
➤ **International students in BC increased by 7% from 2009/10 to 2010/11**

International Students in BC by Sector



BC's International Education Strategy

- Launched in May 2012
- Supports the BC Jobs Plan Goal to increase international students by 50% over 4 years
- Supports the BC Jobs Plan - Skills and Training Plan goal increase the number of international students in trades and technical programs by 500 by 2015
- Positions the province and its residents to benefit even more from the social, cultural and economic opportunities that flow from international education activities
- Includes input from students, educators, institutions and other partners



BC's International Education Strategy

Vision	Goal 1	Goal 2	Goal 3
High quality international education system that fosters social benefits and economic prosperity for all citizens.	Globally oriented education system	Quality learning and life experiences	Benefits for all BC communities, families and businesses

Our Education Marketing Managers

Japan Market Overview

Chika Takahashi
Business Development Manager,
Education & Research Partnerships

**British Columbia Trade and
Investment Office, Japan**

Chika Takahashi

Japan

Market Overview

Chika Takahashi

Market Interest in Study Abroad Growing

While total number of study abroad students continues to fall since its peak (2004), some latest stats (2010, 2011) show growth for Canada

Challenges:

- Year-by-year drop in number of school-age children (but number of 18 year olds stabilized for 2009 - 2020)
- Year-by-year drop in average annual household income: JPY 5.38mil (2010) vs. 6.64mil (1994/peak)
- University entrance exams and corporate recruitment of univ. grads

Opportunities:

- Increased demand for human resources equipped with English language skills and global mindset
- National and local government's various initiatives promoting international education and study abroad

Japan

Sector Overview

Chika Takahashi

Public and Private K-12

- In 2008, 460 students from 200 public and private high schools (K10-12) studied in Canada for 3 months or more. (In 2006: 617 students)
- National Government's scholarship budget for high school study abroad
FY2011: JPY 27.3mil (50 students)
FY2012: JPY 122.6mil (300 students)

Public and Private Post-Secondary

- In 2010, 58,060 students studied abroad (on diploma/degree courses). 3.1% decrease from 2009. Canada ranked at #7 (2,097 students) and was the only English-speaking destination within Top 10 which showed increase (4.6%).

Public and Private Language Schools

- In 2012, Japan was #1 source country for BC schools (Languages Canada)
- Growing potential for corporate market (employee trainings)

Japan

Agent Overview

Chika Takahashi

Agent Industry Associations

- **Japan Association of Overseas Studies (JAOS)**
FELCA-accredited association
<http://www.jaos.or.jp/english/>
- **Council of International Education & Language Travel (CIEL)**
Operated by Japan Association of Travel Agents (JATA)
<http://www.jata-net.or.jp/ciel/english/>
- **NPO Ryugaku Kyokai**
Has Study Abroad Advisor Accreditation Program
Total of 904 certificate holders by October 2012
(In Japanese) <http://www.ryugakukyokai.or.jp/>
- **Japan Commission for the Regulation of Overseas Services (J-CROSS)**
An agent certification body established in Nov 2011, by the above 3 associations,
in response to the bankruptcy of Gateway 21 (2008) and SUCCEO (2010)
<http://www.jcross.or.jp/english/>

South Korea Education Market Updates from BC Representative Office, Korea

Yun Ju Jung

South Korea – Market Overview

- Second largest market for BC institutions.
- 17,500 students from South Korea in 2010/2011
- Education = Investment
- Strong competition - Main competitors are USA, United Kingdom, Australia and New Zealand. Singapore, China, Philippines are also actively promoting their countries.

South Korea – Sector opportunities

K-12 - Reasonable tuition / Safety / Reputation for high quality education / Competitive local learning environments / BC Global Education program

English Language - Working holiday (4,000/year) / Safety and clean environments / Commitment to up-skilling for future job opportunities

Post-Secondary - Staircasing from ELS and secondary schools (including BC Global Education Program)/ People exchange / Demand for vocation training / Partnerships with Korean Universities

South Korea – Agent Overview

- Still Agent driven market VS More and more people are looking at self-processing
- KOSA – Korea Overseas Study Association – 80 members (www.kosaworld.org)
- Developed by DFAIT with support of CCIEM and ICEF has launched Canada's own online agent training programs(www.canadacourse.ca)
- Visa Section at the Embassy – Closed from 28 January 2013

Educational Opportunities in North China

International Trade & Investment Office, North China
Government of British Columbia, Canada

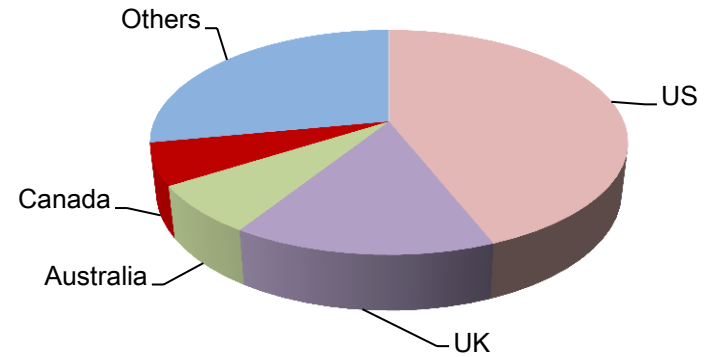
February 2013

Vicky Song

Market Overview



Market Shares



Opportunities

- Institutions with government background
- Exposure to diverse industries = more education leads

Challenges

- Competition with US/UK/AUS

Sector Overview

Public and Private K-12

- Younger students studying abroad

Public and Private Post-Secondary

- Long-term partnership and short-term programs
- Vocational Training
- Executive Training
- Foundation/Pre-master
- Overseas Campus

Public and Private Language Schools

- Working Professionals

Agent Overview

- Overall trends, why and which agents
- Case 1: Exclusive partnership
- Case 2: Strengthen agency relationships

Market Overview – East China

Zhu Bin

BCTIO Shanghai Office – East China



BCTIO Shanghai Office – East China



Sector Overview

- **K-12:**
 - Opportunities especially in 2nd/3rd tier cities
 - Opportunities for partnerships, teacher training
 - Qualified international teachers in demand
- **Post-secondary:**
 - Major future opportunity sources
 - BC Brand awareness is not widespread
 - Alumni engagement is not fully realized
 - Some Universities/Colleges are much more successful than others

Challenges and Opportunities

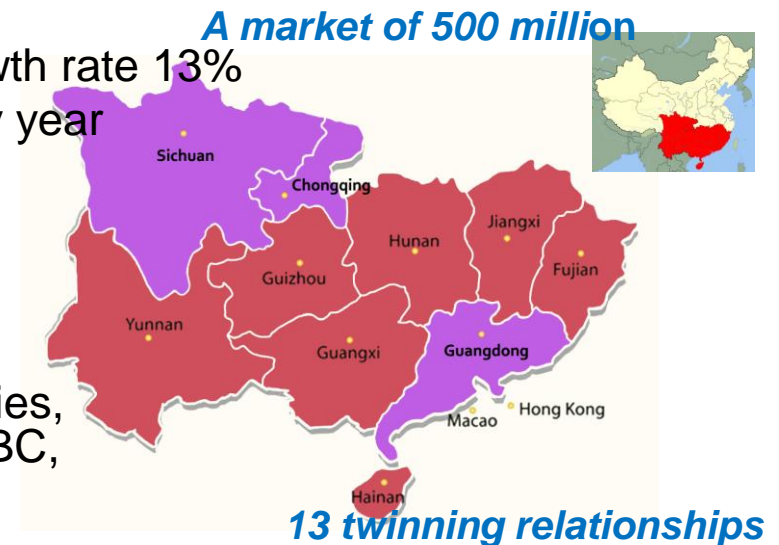
- Need to plan, fund and pursue a long-term strategy and build the BC Education Brand instead of pursuing immediate revenue
- Policy changes in China mean action needs to be pursued quickly
- Competitors are also our best teachers
- Prioritize resources to second/third-tier cities in (East) China; great diversity between different tier cities (parents vs. students)
- More Alumni activities needed to show the value of BC Education
- Social Networking Service Platform (BC Alumni Weibo, Study in BC Weibo, Weixin)...
- Local Teacher and Student Exchange and Training and Partnerships
- Innovation and Research Partnerships

Market Overview – South China

Tom Wang

Market Overview – South China

- 9 provinces + 1 municipality
Guangdong (Pearl River Delta): richest province in China
Largest market for education, seafood, imported fruit, tourism
Sichuan & Chongqing: Center of China's Western Development
- 2011 GDP: 30% of Chinese GDP at growth rate 13%
- 100,000+ students going overseas every year
Growth rate of 25%
- Direct flights between BC & SC:
Guangzhou – Vancouver
Chengdu – Vancouver (via Shenyang)
Hong Kong - Vancouver
- Challenges: competing with other countries, knowledge about SC, knowledge about BC, representatives in SC



Sector Overview

- 82 universities + colleges + K-12
- Existing cooperation: summer camps, articulations, student/teacher exchange, executive training, BC offshore schools
- Opportunities: 3-year working plan by Chengdu Government (International school, teacher training, sister school), Guangdong Qiangshi Plan (teacher training)
Guangdong: Shantou University, Nanhai District, Nanfang Medical University,
Fujian universities: articulations, sister relationship, Zhengxing Group

Agent Overview

- Major agents: EIC, Aoji, Jinjili, New Oriental, IDP, Shinyway (list by Chinese MOE)
- Major events in spring and autumn time
 - CIEET 2013 in late March (Fuzhou & Guangzhou) organized by Chinese Service Centre for Scholarly Exchange
 - CEE 2013 in November (Chengdu) by China Education Association for International Exchange
 - 24th **EIC** International Education Exhibition (Shenzhen, Guangzhou, Changsha, Chongqing, Xiamen, Chengdu), March 2013
 - AOJI** International Education Exhibition Spring Tour 2013 (Shenzhen, Guangzhou, Xiamen, Chengdu, Chongqing), late March
 - IDP** Education Exhibition (Chengdu, Shenzhen, Guangzhou), March 2013
 - Shinyway** Education Exhibition Tour 2013 (Shenzhen, Guangzhou, Changsha, Chongqing, Chengdu), March 2013
 - Events by TIRs: Education Roundtable, BC Student Recruitment Fair.
- **Inbound upcoming visit:** GD Education Dept., FJ Jiangxia, FJ Wuyi, FJ Huaqiao U.
- Market reports by GZTIR and agents

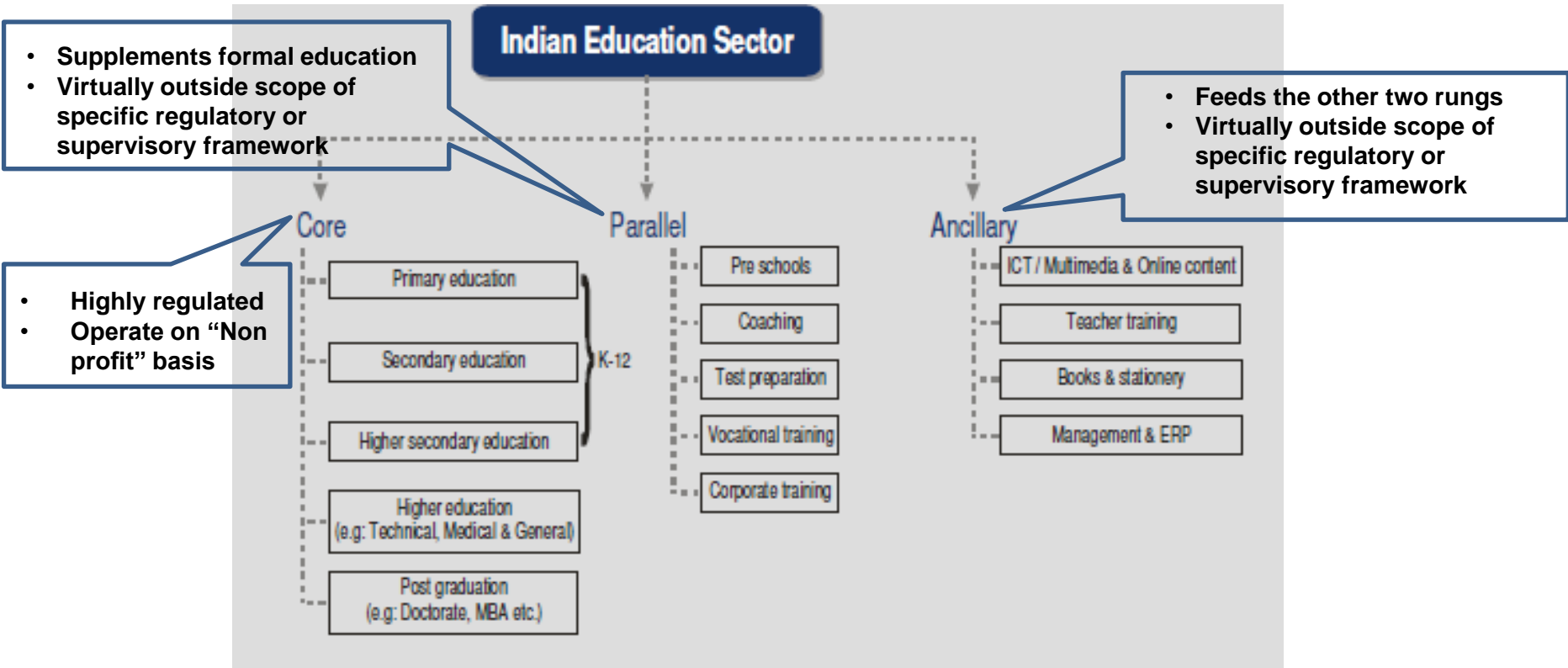
Market Overview – India

Shailaja Vora

Market Overview

- **At US \$600bn, India's education sector is bigger than that of the US**
- **Private education revenue growing 19%, to touch US\$45bn by 2015**
- **Over 10% of wallet:** 10.4% of total consumer spend of the urban affluent funds private education
- **Skill enhancement: the next big thing**
- **India market supported by EMM in Mumbai (North) and Bangalore (South)**

Segments of Indian Education Sector



Challenges

- “Not for profit” mandate for institutes wanting to enter Indian market
- Regulatory challenges
- Lack of knowledge about BC’s institutions
- Increased competition in the market form other destinations (USA, UK, Europe, Australia, New Zealand, others)
- Lack of awareness of BC’s education and training strengths

Opportunities

- Tie-ups with Indian Educational institutions for:
 - Twinning programs
 - Providing expertise and services like faculty for teaching, curriculum, affiliations etc
 - Distance Education programs
 - Student exchange programs
 - Faculty exchange programs
 - Joint research programs
- Setting up entity in India/entering into arrangements with Indian parties for assistance with student recruitment activities
- Enter the large and rapidly growing market for coaching and tutoring services imparted through new and innovative means, particularly the internet
- Tie-ups with Indian corporates who are looking to outsource skill training activities to specialised institutes

Higher Education

- Caters for students over 18: undergraduates (18-21 years) and graduates (22 years plus).
- Public spending on higher education has been gradually reducing
- Currently 77% of higher education institutes are privately owned.
- Private opportunity in technical education is US\$7bn in 2012 and is set to grow to US\$12bn by 2015
- Private opportunity in General (non-technical) higher education is US\$1.5bn in 2012 and is set to grow to an estimated US\$2bn by 2015
- Target of imparting skills to 500 million citizens over the next 10 years.
- NSDC(public-private partnership) set up with the objective of achieving 30% of this target, or 150m trained people, by 2022
- Prospective employers usually sponsor vocational courses, often through in-house training facilities, backed by job guarantees at the end of the training

Skill Training: Drivers and Opportunities

Drivers

- Demand for skilled workforce increasing with growth in service sector
- Inefficient public education system
- Lacking employability skills based education system
- Competitive business environment

Challenges

- Lack of financial institutions support
- Individual perception
- Lack of quality trainers
- Lack of equipment's & machinery for training

Agent overview

- Indian agencies focus on multiple countries
- Non regulated and fragmented industry
- Easy to sign up agents
- Low credibility

Roles and Responsibilities

Role of BC's Education Marketing Managers (EMMs)

- Promote BC as an international education destination at international trade shows
- Leverage BC's trade offices and other resources to advance overseas marketing.
- Promote international education in BC through the use of focused publications, marketing material and other methods such as social media campaigns
- Develop relationships with alumni and related networks overseas, using BC-educated students working overseas to help better promote business opportunities in and for BC including:
 - hosting events for alumni
 - extending invitations to appropriate government and industry networking events

Roundtable

- Questions
- Answers
- Suggestions
- Next Steps

Contact Information

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