

PRESENTATION

Where will Students Come from Next? Emerging Growth Markets for Global Student Mobility

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Publication

ICEF Insights

A focus on five emerging markets, the impact of continuing growth in Asia, helpful online marketing tips, and advice on how to build a diversification strategy that works

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INTRODUCTION

What we'll talk about

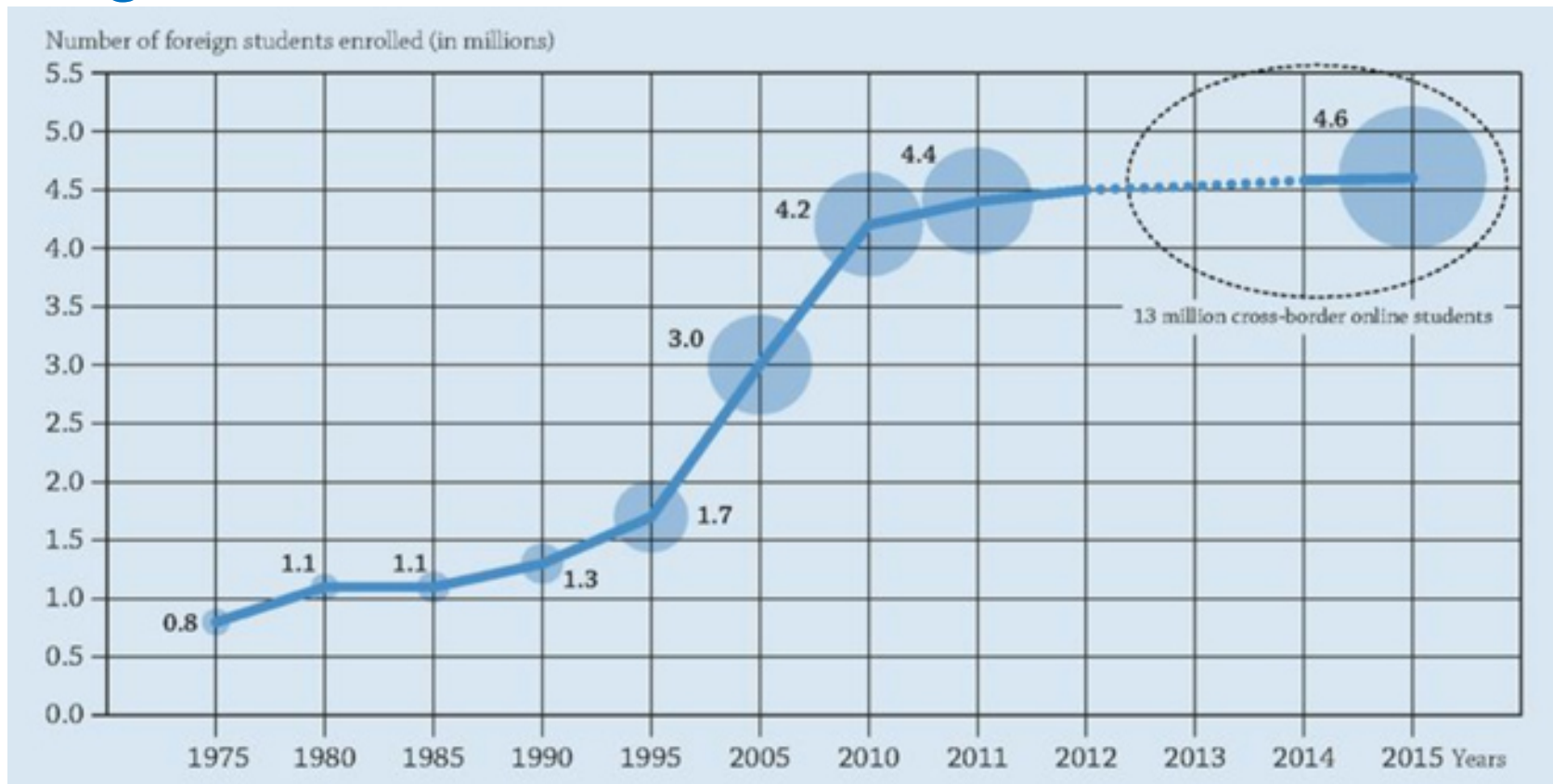


How to select and
prioritize new markets

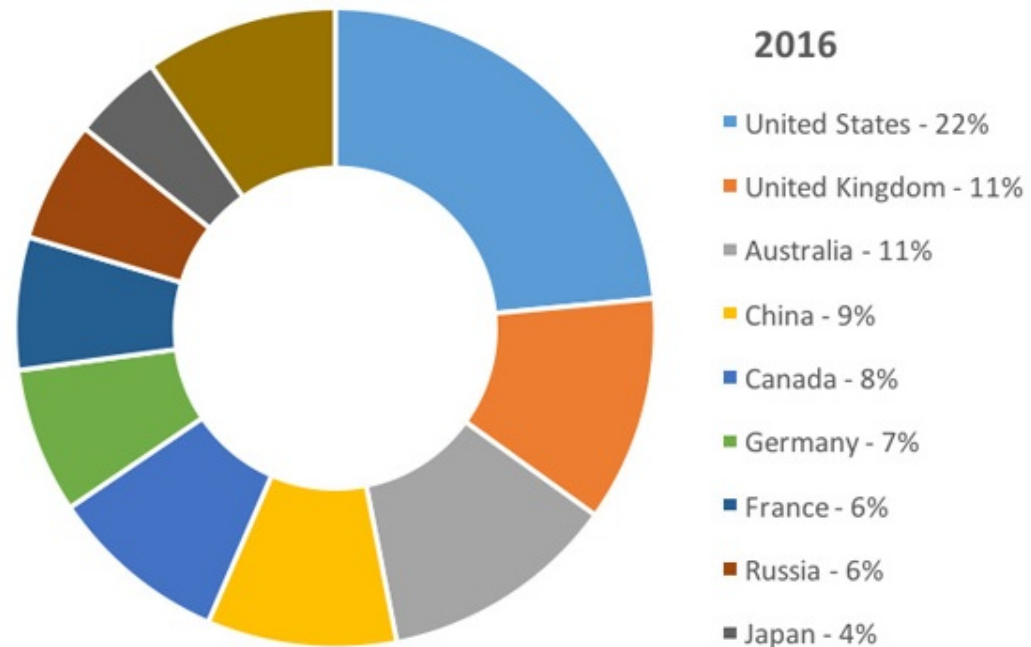
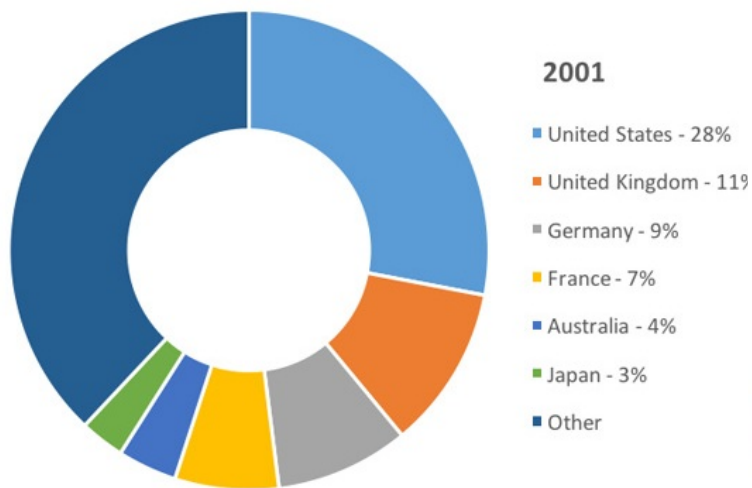


Some of the most promising
recruitment markets

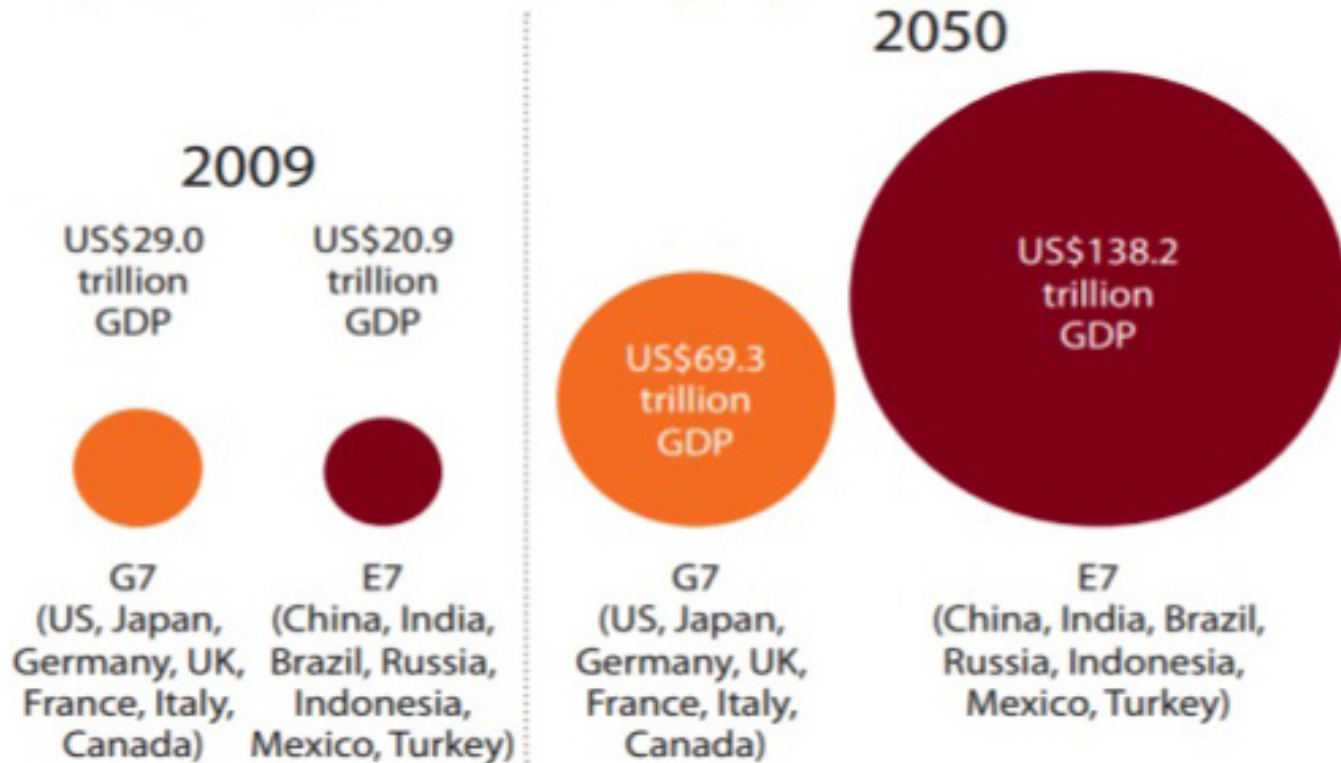
Big Picture



Competing for Share



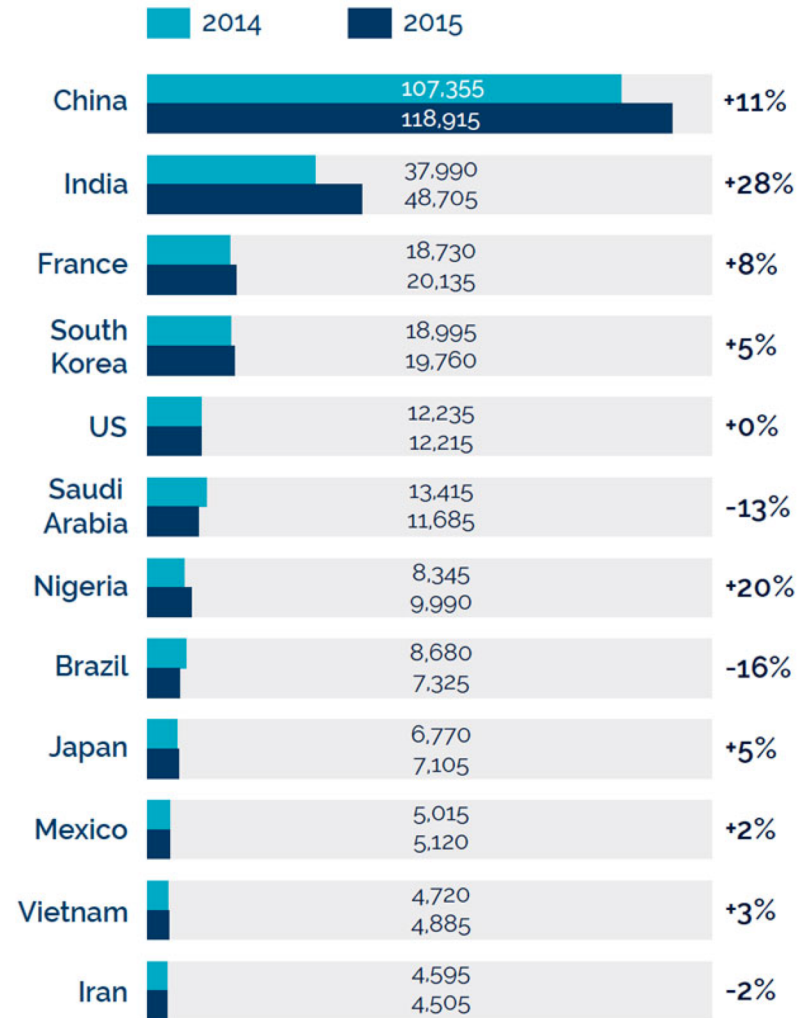
GDP of G7 and E7 countries is shifting in unprecedented scale and pace



CONTEXT

Major sending markets

- **China and India = half**
- Saudi and Brazil former growth drivers



Selecting Emerging Markets





Market Fundamentals

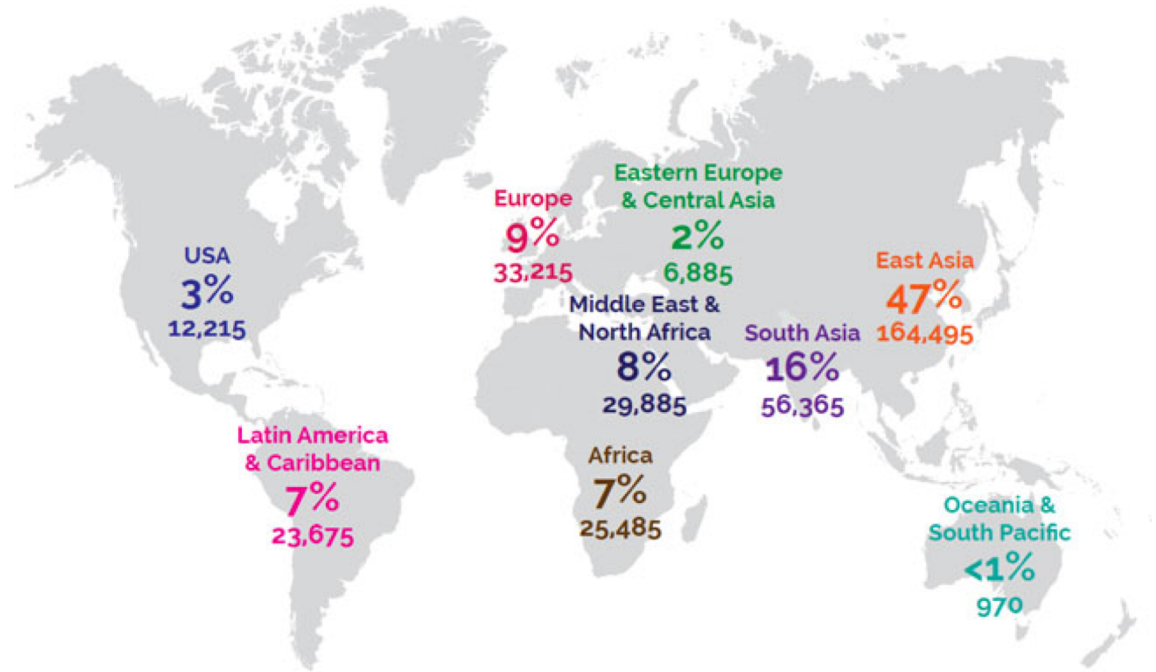
- Growing population
- College-aged demographics
- Economic growth and expanding middle class

- Labour market demand
- Domestic capacity for higher education
- Secondary school system

- Ability to move people and funds

Five Growth Markets

INDONESIA
VIETNAM
NIGERIA
COLOMBIA
IRAN



Vietnam

- **One-third of the population will join middle class by 2020**
- Young and growing population
- Significant quality and capacity issues in higher education
- A “something for everyone” market
- *Key to market: Career opps*



Colombia

- **Third-largest economy in Latin America**
- The region's most-educated country by 2025
- Rapid growth in tertiary enrolment and outbound
- *Key to market: Language support*



STEP-BY-STEP

Market Fit

- Program demand
- Required services or supports
- Underlying travel or migration patterns
- Competitive landscape

Nigeria

- **Huge college-aged population**
- Unmet demand for higher ed
- Fast-growing market for post-grad
- *Key to market: Degree market, price sensitivity*



Indonesia

- **Huge population with growing incomes**
- Very strong family and community ties
- Support services and safety key
- *Key to market: Student and family supports*



Iran

- **One of the fastest-growing post-grad markets in the world**
- 60% under age 30
- Personal contacts
- *Key to market: Get on the ground*



Sending Markets for Canadian secondary schools

In 2015, the top 20 source markets for primary and secondary enrolments in Canada were as follows:

- | | | |
|-------------------|---------------------|-------------------|
| 1. China | 8. Saudi Arabia* | 15. France |
| 2. South Korea | 9. Brazil | 16. Russia* |
| 3. Mexico | 10. India* | 17. Thailand |
| 4. Japan | 11. Vietnam | 18. Spain |
| 5. Philippines* | 12. United Kingdom* | 19. South Africa* |
| 6. Germany | 13. Taiwan | 20. Turkey |
| 7. United States* | 14. Nigeria | |

** Analysis from CAPS-I indicates that enrolments from these markets are largely composed of accompanying children of expat employees in Canada, and, as such, are likely not full fee-payers.*

Sending Markets for Canadian secondary schools

Big established market (nationally speaking): China

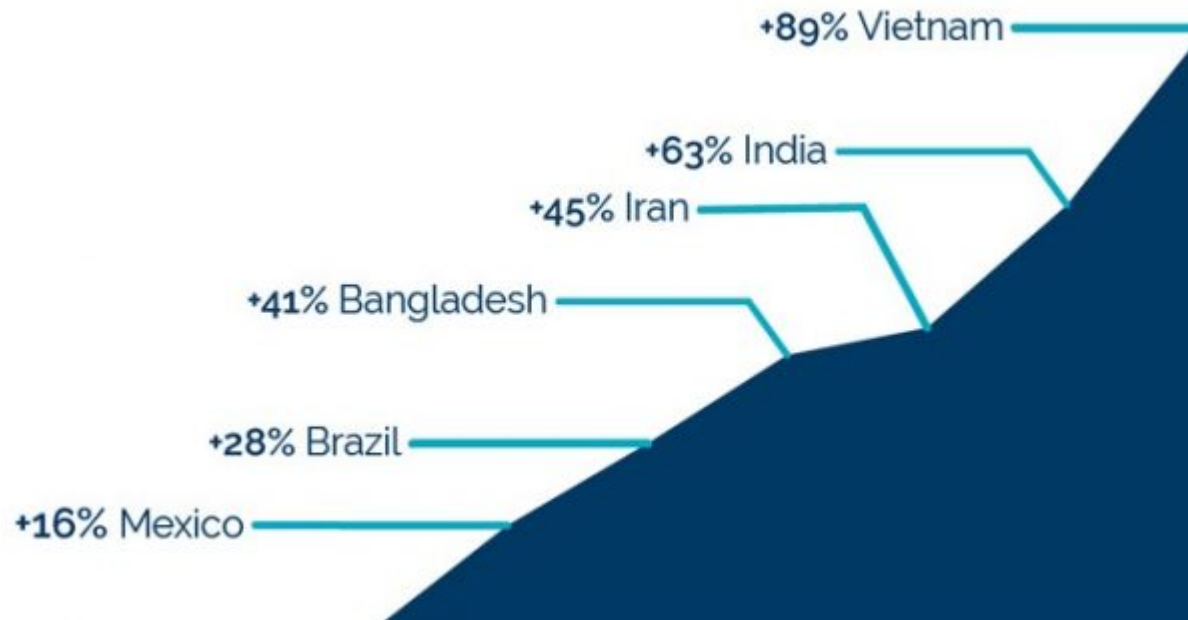
Next tier: South Korea, Mexico, Japan

Emerging Markets: Vietnam, Nigeria, Brazil, Turkey, Ukraine, Russia

Major Sending Markets for International Students in Canada



Canada's Fastest Growing Markets



Brazil

- **Significant economic recovery**
- 23% increase in Brazilian outbound in 2017
- Canada ranks most-popular destination among students
- *Key to market: Personal contact/relationship market*



STEP-BY-STEP

Market Connection

- Do we have students from there already?
- Do we know which programmes students from that country are looking for?
- Do we have alumni or staff that we can leverage for market entry?

STEP-BY-STEP

Begin

- Research and plan
- Make local connections
- Get on the ground



SUMMING UP

Common threads

- Surging economies
- Burgeoning middle class
- Large and young populations
- Limited higher ed capacity
- Strong labour market demand

INDONESIA
VIETNAM
NIGERIA
COLOMBIA
IRAN

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THANK YOU

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