5 emerging markets to watch
Next-level recruiting
Jobs on the brain
PLUS: Junior markets, interdisciplinary learning, and innovation hubs

DIGITAL NOW:
How technology is connecting educators, agents, and students
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With growing global demand in the sector and geographic expansion comes the ever-increasing demand for more talent. Domestic skills shortages in hospitality and tourism are well recognised and the industry is in critical need of more management level hospitality professionals. As a career option, the hospitality and tourism sector provides immense opportunity for educated graduates to access roles in a diverse and exciting industry. JCU Brisbane can provide you with a quality education to access your passport to a world of opportunities. Enquire now!

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Left: Artist impression of Brisbane’s Queen’s Wharf Development

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FEATURES

LANGUAGE LEARNING AND TECHNOLOGY 32
Hundreds of language apps are now available to students all over the world, and traditional language schools are enhancing their service offerings using online and mobile technologies.

BUILDING BETTER CONNECTIONS 38
New industry players are leveraging technology to smooth communications and business processes between educators and agents.

RECRUITING ON SCREEN 42
Unprecedented numbers of students are crossing borders to study – and they’re not just choosing traditional destinations. What’s driving today’s student mobility trends?

Digital now: How technology is connecting educators, agents, and students 32

5 emerging markets to watch 18

Next-level recruiting 54

Jobs on the brain 14

PLUS: Junior markets, interdisciplinary learning, and innovation hubs 49
DEPARTMENTS

WELCOME 9
ICEF CEO Markus Badde on the promise – and limits – of new technologies.

NEW & NOW
12 IN CONTEXT
What’s driving student mobility today?

14 JOBS ON THE BRAIN
Mapping out how education leads to jobs and higher incomes.

16 FACTS & FIGURES
Technology and demographics are driving the growth of international education.

18 EMERGING MARKETS
Five countries with great potential for increased student mobility.

22 EDUCATION FOR A BETTER WORLD
Nine jaw-dropping inventions led by students and professors.

24 PERSPECTIVES
What can schools do to enhance students’ experiences of study abroad?

30 STAFF INSIGHTS
ICEF employees consider how technology is affecting agents’ businesses.

TRENDS

50 MAKING SPACE FOR INNOVATION
Innovation hubs boost schools’ ability to recruit and to inspire research.

54 THE ALLURE OF NICHE MARKETING
Sometimes thinking small is thinking big.

58 INTERDISCIPLINARY LEARNING ON THE RISE
Collaborative learning approaches are gathering steam.

62 LANGUAGE STUDIES FOR KIDS AND TEENS
Kids now compose nearly half of ELT enrolments in some destinations!

OUTREACH

69 MAKE EVERY (TOUCH)POINT COUNT
How to extend the power and resonance of your brand.

70 THINK OF BRANDS LIKE PEOPLE
What does your school really stand for?

74 ADD FUEL TO MARKETING FIREPOWER
New ideas on how to stretch your digital reach among students.

CALENDAR 78
Industry events in 2017.

WISHLIST 80
How do students decide where they will study abroad?
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I am sure that like me, many of you remember a time not so long ago when international educators were faxing applications and had to know different telephone country codes so they could call their agents to set up meetings or help counsel a student. How the times have changed! Skype, webinars, and CRMs have profoundly changed how we work. But technology has always been a major challenge – and opportunity – in our industry.

And, as always, there is the risk of becoming fixated on the newest technologies to the exclusion of more traditional ways of communicating and marketing. Virtually all of us are online, and we’re doing our utmost to figure out how best to leverage digital tools to improve our businesses. But the most competitive among us employ technology alongside a deep commitment to friendly, caring, exceptional outreach and service to the students we serve. Our business is, after all, entirely about relationships.

As much as students love their gadgets and social media, if you look at testimonials from satisfied alumni, most often you’ll read about the people who made students’ educational journeys unforgettable. Educators and agents who add a personal touch that goes above and beyond what competitors do are the ones who make it into such testimonials.

With the success of the ICEF Berlin Magazine last year, we heard feedback from you, our readers, on what you wanted to see in future editions. Taking this into account, the articles in ICEF INSIGHTS examine digital catalysts in international education today as well as current research on what most interests – and engages – students. The magazine also looks at key emerging markets, current drivers of student mobility, and hot trends in higher education and language learning.

I hope you enjoy reading this second edition of ICEF INSIGHTS.

Markus Badde
Chief Executive Officer
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NEW&NOW

New research, hot emerging markets, key trends – and proof that education leads to jobs

Iran is one of five emerging markets that look increasingly promising for educators wanting to diversify their enrolments. Shown here is Azadi Tower, a 50-metre marble-clad freedom monument in Tehran. Find out more about emerging markets on Page 18.
IN CONTEXT

Trends that will move the needle in global education markets over the next decade – or more

1. SLOWER GROWTH, NEW DESTINATIONS

Roughly five million students are studying abroad today – an increase of nearly 67% since 2005 – and the OECD projects that eight million students will be studying abroad by 2025. The big question is, what happens to the growth curve after that? A major driver of student mobility to date has been unmet demand for higher education in developing countries: when students can’t access quality education at home, they become motivated to go abroad. This trend has spurred astonishing numbers of Chinese and Indian students to travel overseas for their studies over the past decade.

But the popularity of various destinations is changing. Asian higher education systems are steadily strengthening, to the point where several universities in China, Hong Kong, Singapore, and Malaysia now rank among the world’s best. A growing number of students in these countries are choosing to stay within the region to study, and students from other countries – including African ones – are adding Asian destinations to their list of attractive options.

As Asia increases its capacity to absorb students from the region and expands its recruitment of international students, countries such as the US, the UK, Australia, Canada, and New Zealand may well see demand for places in their institutions slow, especially from major sending markets such as China and India.

TAKEAWAY: Pursuing greater diversification in
TAKEAWAY:

Countries.

From high-income OECD as compared to only 29% between 2000 and 2012, economies jumped 161% from upper-middle-income international students total number of outbound student mobility. The driving growth in outbound economies … are the ones that “Upper-middle-income and Reviews (WENR) notes middle-class population. 66% of the total global 3 billion in 2030 to represent 3 million in 2010 to more than expected to grow from 600 20-24-year-olds to decline by 20% from 2010 to 2020.

2. MIDDLE CLASS RISING

Countries with expanding middle classes will see more of their students able to consider study abroad.

In Asia, the middle class is expected to grow from 600 million in 2010 to more than 3 billion in 2030 to represent 66% of the total global middle-class population. World Education News and Reviews (WENR) notes that “Upper-middle-income economies ... are the ones driving growth in outbound student mobility. The total number of outbound international students from upper-middle-income economies jumped 161% between 2000 and 2012, as compared to only 29% from high-income OECD countries.”

TAKEAWAY: Some of the most significant emerging markets for international education are characterised by large and growing middle-class populations. These markets include India (which may be the world’s largest middle-class consumer market by 2030), Nigeria, and Indonesia.

3. LEADING DESTINATIONS LOSE GROUND

At the same time as developing markets have been increasing educational capacity and quality, the heavyweights of international education - the US and the UK – have been losing market share. The US share of internationally mobile students dropped from 23% in 2000 to 16% in 2012, even as the absolute number of foreign students in America continues to climb. The UK has lost ground as well. This shift is largely a function of increasing competition among destinations. Both Canada and Australia have attracted a greater share of international students over the past decade; other countries have also gained ground. The OECD reports that “significant numbers of foreign students were enrolled in the Russian Federation (4% market share in 2012), Japan (3%), Austria (2%), Italy (2%), New Zealand (2%), and Spain (2%).” As mentioned, Asian regional hubs are also beginning to capture the attention of prospective international students.

TAKEAWAY: The stage is set for a new level of competition among leading study destinations over the next decade and beyond. National visa and immigration policies (including work rights for international students), coordinated destination marketing campaigns, scholarship programmes, and intelligent strategies for the packaging of programmes and study pathways will be some of the factors countries may be able to leverage as they attempt to maintain or increase market share.

4. NEW COMPETITION AND REGIONAL HUBS

The increasing role of intra-regional mobility is clearly visible in UNESCO statistics indicating that the percentage of Latin American students remaining within the region increased from 11% in 1999 to 23% in 2007. Similarly, the percentage of mobile East Asian students studying within the region rose from 36% to 42% over the same period.

Regional mobility schemes around the world have spurred such patterns. These include the ASEAN International Mobility for Students (AIMS) programme and the landmark Erasmus programme in Europe.

In addition, bilateral mobility arrangements, including Mexico’s Proyecta 100,000 initiative and the corresponding 100,000 Strong in the Americas programme for students in the Western Hemisphere, are playing an ever-larger role in determining where students choose to study abroad.

Finally, certain Asian economies are busy developing their own centres of expertise and actively recruiting international students to them. Recent examples include the Philippines’ English-language Training (ELT) sector and the 10,000 new seats opened for foreign students at India’s premier engineering institutes.

TAKEAWAY: Students have an expanding array of educational options that are (a) close to home and (b) more affordable than those in traditional leading destinations such as the US and UK. To remain compelling, schools and governments in Western destinations will have to think hard about their points of competitive differentiation and will likely need to position themselves on benefits other than proximity and price. Bilateral agreements, quality, industry linkages including internships, and post-graduation work rights are some of the variables that will be important going forward.
JOBS ON THE BRAIN

Research shows a link between study abroad and better job prospects – and points to pressing skills shortages in certain regions

**CANADA** Nine in ten Canadian employers said they “value prospective employees with international experience because it develops cross-cultural understanding.” (CBIE)

**US** Nearly all (97%) surveyed American students who studied abroad secured a job within 12 months of graduation, compared with 49% of graduates who did not study abroad. (IES Abroad)

**BRAZIL** Demand among Brazilian students for career-specific overseas English programmes increased by up to 40% from 2014 to 2015. (BELTA)

**LATIN AMERICA** One-third of surveyed employers in Latin America use foreign workers to meet skills gaps, underlining the need for the local population to acquire these skills. (ManpowerGroup)

**AFRICA** 7 in 10 surveyed African firms report that “vacancies are taking longer to fill,” because local workers don’t have the skills necessary for positions. (EY’s Attractiveness Survey Africa 2015)
Eastern European students who participate in Erasmus are 83% less likely than non-mobile students to be unemployed over the long term. (Erasmus Impact Study)

Nearly half of Southern European Erasmus students who participated in a work placement went on to receive a job offer from their host company. (Erasmus Impact Study)

In Hungary, 9 in 10 Erasmus alumni hold management positions within a decade of graduating – more than twice the rate of non-mobile students. (Erasmus Impact Study)

Almost two-thirds of surveyed Scottish employers said they believe studying abroad improves applicants’ employment prospects versus less than a third who did not think it would. (NUS Scotland)

More than 8 in 10 surveyed Japanese employers are struggling to fill jobs. And in a global survey, 38% of employers reported talent shortages, a 7-year high. (ManpowerGroup)

Less than 2% of 2,450 Polish graduates surveyed in 2012 were still unemployed after participating in either the 2007 or 2008 Erasmus programme. (University of Lodz)

Government figures indicate that less than 5% of India’s 487 million workers have received any formal skills training, compared with almost 60% in other industrialised countries. (BBC)

Indonesia graduates about 30,000 engineers every year but needs 50,000 to meet its growth targets, a 40% shortfall that is projected to rise to 70% by 2025. (Jakarta Post)

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NEW&NOW

FACTS & FIGURES

Technology – and demographics – are driving the growth of international education

8 IN 10
Number of smartphone users expected to use chat services instead of text messaging by 2018 (Source: Juniper Research).

650 MILLION
Monthly active WeChat users as of late 2015, with 639 million accessing the service via smartphone. WeChat’s user base is mostly in China but the service is now aggressively targeting international markets, particularly in Africa (Source: DMR; Quartz).

1 BILLION
WhatsApp’s monthly active users; the Facebook-owned messaging platform now surpasses Facebook’s other messaging service, Facebook Messenger, which has 800 million users (Source: Quartz News).

75%
Percentage of Instagram users who live outside the US (Source: DMR).

3.5
Average number of hours Filipinos spend on social media each day, compared with the global average of 2.4 (Source: We Are Social).

1 MILLION
Selfies taken around the world each day, with Australians the leaders in selfie shots (Source: International Business Times).

40%
Percentage of the world’s population with an Internet connection in 2016, compared with less than 1% in 1995 (Source: Internet Live Stats).

ALMOST 80%
Percentage of smartphone subscriptions predicted to be from Africa, Asia Pacific, and the Middle East by 2020 (Source: Ericsson Mobility).

2075
Year Africa’s youth population is expected to surpass Asia’s (Source: UN).

5 TO 14
Age range during which 4 in 10 students start thinking about studying abroad (Source: FPP EDU Media/Intead).

1%
Percentage of international students enrolled in a science, technology, engineering, and mathematics (STEM) programme in American universities (Source: Student and Exchange Visitor Program [SEVP]).

LESS THAN HALF
The cost for Japanese and Korean students to study English in the Philippines instead of the US or Europe (Source: ICEF Monitor).

LESS THAN 1%
Only a fraction (0.25%) of second-language learners worldwide travelled abroad to learn a language in 2014; the vast majority learned another language in their home country (Source: International Association of Language Centres).

MORE THAN 200%
Percentage increase in English-taught programmes in Europe over the past seven years (Source: Academic Cooperation Association [ACA]).

40%
Percentage of international students enrolled in a science, technology, engineering, and mathematics (STEM) programme in American universities (Source: Student and Exchange Visitor Program [SEVP]).

BETWEEN 5 AND 14
Age range during which 4 in 10 students start thinking about studying abroad (Source: FPP EDU Media/Intead).

NEARLY 4,000
Number of massive open online courses (MOOCs) operating at the end of November 2015, up from 100 in 2012. The number of students registered in MOOCs in 2015 was almost equal to the number taking them over the previous three years combined (Source: Class Central).

2015
Sixth consecutive year of above-average growth in worldwide tourism, with a 4% increase expected for 2016 (Source: UNWTO World Tourism Barometer).

1%
Percentage of the population in Nigeria, Ghana, Bangladesh, and Uganda with a working landline telephone in their household, compared with 60% landline penetration in the US. Mobile phones, however, are commonplace in these developing markets (Source: Pew Research Center).

40%
Percentage of the world’s population with an Internet connection in 2016, compared with less than 1% in 1995 (Source: Internet Live Stats).

ALMOST 80%
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EMERGING MARKETS

Diversification is the name of the game in sustainable recruitment strategies. These markets have impressive mobility potential for the years to come.

VIETNAM

With an economic growth rate of 6.7% over 2015–16 – comparable with China’s – Vietnam is steadily pulling more of its citizens out of poverty and into the middle and upper classes. One-third of Vietnamese are expected to join the middle class by 2020, and as of 2016, Vietnam boasts the world’s fastest growing percentage of ultra-high-net-worth individuals. As families secure more wealth, they are better able to send their children abroad – and there are a lot of children: the median age in Vietnam is just 28.5.

Already we are seeing more Vietnamese students in the rest of the world. Japan welcomed 38,882 in 2015 (up 47.7% from 2014), and the US enrolled 28,883 in the same year, a significant increase as well. Ninety percent of outbound Vietnamese students are self-funded.

Ha Long Bay, Quảng Ninh, Vietnam

NINETY PERCENT OF OUTBOUND VIETNAMESE STUDENTS ARE SELF-FUNDED
COLOMBIA

Colombia is the third largest economy in Latin America, after Mexico and Brazil, and more growth is likely as the government finalises a peace accord with the Revolutionary Armed Forces of Colombia (FARC). The country’s middle class has steadily expanded despite the war, growing from 16% of the population in 2002 to 27% in 2011.

President Juan Manuel Santos’s mission is that Colombia will be Latin America’s most educated country by 2025, and in keeping with this goal, he increased Colombia’s education budget by 5.75% to US$14.52 billion in 2015. In so doing, the president made 2015 the first year ever that the Colombian government spent more money on education than on the military.

Tertiary enrolment in Colombia more than doubled between 2003 and 2013 to reach 2.1 million, and the number of Colombian tertiary students abroad has increased by roughly 50% over the past decade to total more than 25,000 students in 2013.

INDONESIA

In Indonesia – the world’s fourth-most populous country and one of its 20 largest economies – the middle and affluent consumer classes are expected to double in size by 2020 from 74 million to 141 million, according to Boston Consulting Group. On top of rising wealth, Indonesia also has a very young population – the median age is 28.2.

Indonesians aged 15–29 make up a third of Indonesia’s workforce; however, youth unemployment is high and two million people enter the Indonesian labour market every year. Career-focused education is naturally on the minds of many, and thus opportunities to study abroad will likely grow in popularity in the near term. The Jakarta Post recently noted that Indonesia will have one of the largest college-going populations in the world by 2020 but that it will be one “with limited access to market-oriented education opportunities within its borders.”
NIGERIA

One-fifth of Nigeria’s massive population of 181 million people is between the ages of 15 and 24 – creating significant demand for higher education that cannot be met domestically. Nearly 1.5 million Nigerians seek a place at a Nigerian university each year, but only about half a million are able to get in. This goes a long way to explaining why Nigeria is the leading African source of international students.

More than 50,000 Nigerians studied abroad in 2012, and their numbers have gone up substantially in certain markets since then: nearly 9,500 Nigerians studied in the United States in 2014/15 – a 20% increase over the year before – and 8,620 studied in Canada in 2014. Those recruiting for post-graduate programmes in particular will want to keep an eye on Nigeria: The British Council recently projected that of the 23 source markets it studied, Nigeria will contribute the strongest average annual growth in post-graduate student mobility through 2024 (+8.3%).

IRAN

In the wake of a historic nuclear deal earlier this year, Iranian universities are working to quickly build collaborative links with universities across Europe. The country has always been interested in international education, however: Iran has been the second fastest growing outbound market for post-graduate studies in recent years (behind only Saudi Arabia), and the British Council projects continued growth through 2024.

Driving this projected growth in part is the fact that domestic capacity for post-graduate students is insufficient to meet demand: 900,000 Iranian students applied for a master’s programme in 2011 but only 60,000 were accepted (6.6%). Meanwhile, only 4% of those seeking acceptance to a doctoral programme were successful.

Add to this the striking fact that roughly 60% of Iranians are 30 years of age or younger and this is definitely a source country to explore.
Jordan Fraser, a second year Bachelor of Business Administration student majoring in marketing, is doing a Co-op work term in Alberta for Parks Canada at Waterton Lakes National Park.
EDUCATION FOR A BETTER WORLD

What’s coming out of universities today? Student- and faculty-led advances in areas such as ageing, disability, environmental pollution, and affordable transport. Proof positive that education can change the world.

1. **EN POINTE SCALE**
   “If you can measure [balance], you can do something about it.”

   Every 13 seconds in the US, an older adult falls and must be taken to an emergency room. The En Pointe Scale detects changes in a person’s balance that can affect their likelihood of falling and/or being injured. The scale rates the user’s balance from 1 to 10, where 1 suggests the greatest fall/injury risk and 10 the least. Users can then make daily activity decisions based on their score and learn how they can adjust their lifestyles – through diet, exercise, and sleep – to improve their balance.

2. **YERKA BIKE**
   “The unstealable bike.”

   Bikes help millions of people commute every day. But bike theft is a major problem, especially in Chile, where more than 100,000 bikes are stolen each year. After experiencing bike theft first-hand, university students Andrés Roi, Cristóbal Cabello, and Juan José Monsalve developed a model with a frame that becomes the lock. To steal the bike, you have to break the frame, rendering the bike useless.

3. **UNDERCOVER COLORS**
   “The first fashion company empowering women to prevent sexual assault.”

   Date-rape drugs being slipped into drinks is a growing problem – and the drugs are difficult to detect before someone ingests them. Undercover Colors nail polish is designed to prevent some sexual assaults by empowering women with a discreet tool to detect date-rape drugs in their beverages. When dipped into a tainted drink, Undercover Colors nail polish changes colour.

4. **PARIHUG**
   “Hug loved ones … thousands of miles away.”

   When co-founder Harshita Gupta moved from Mumbai, India, to the US in Grade 9, she “discovered how difficult it can be” when you are separated from loved ones. Parihug helps to combat loneliness by maintaining a human connection between two users in different locations. Two teddy bears share an electronic connection. When one is hugged, sensors detect it and transmit a gentle vibration to the other bear for its owner to receive.

**INVENTOR**

- **EN POINTE SCALE**: Dr Erez Lieberman (Harvard-MIT) and Dr Katharine Forth (University of Houston, NASA)
- **YERKA BIKE**: Andrés Roi, Cristóbal Cabello, and Juan José Monsalve (Adolfo Ibáñez University)
- **UNDERCOVER COLORS**: Ankeş Madan, Stephen Gray, Tasso Von Windheim, and Tyler Confrey-Maloney (North Carolina State University)
- **PARIHUG**: Xyla Foxlin (Case Western Reserve University) and Harshita Gupta (Mission San Jose High School, California)
5. **WOUND PUMP**
   "A cheap, portable wound-healing device."
   Acute wounds often heal faster with negative-pressure wound therapy (NPWT). This technique that uses a vacuum dressing to promote healing is effective, yet costly, and the equipment is heavy, requiring batteries and/or electricity. In areas ravaged by natural disasters or war, the $3 Wound Pump is a simple, lightweight, hand-powered, negative-pressure pump that has already helped patients heal faster in places such as Haiti and Rwanda.

6. **SAFEWANDER BUTTON SENSOR**
   "Tiny button. Big peace of mind."
   Kenneth Shinozuka’s grandfather, who had Alzheimer’s, would wander at night, leading to accidents and worry. At age 15, Shinozuka developed a thin pressure sensor that attached to his grandfather’s sock and alerted his family when he got out of bed. Shinozuka’s invention has developed into a line of wearable button sensors that alert caregivers, through a smartphone app, when a loved one gets up from a bed or chair.

7. **SMARTCANE™**
   "SmartCane™ ensures independent mobility and safety and gives confidence."
   Safe, independent mobility is one of the biggest challenges for those with visual impairments. Traditional mobility canes are limited to detecting obstacles on the ground. SmartCane™ upgrades the white cane, enabling the user to identify obstacles above knee height and within a three-metre radius.

8. **PUREMADI**
   "Innovative point-of-use water treatment technology."
   Fifty percent of the world’s population lacks access to clean, safe drinking water. PureMadi is an organisation that developed out of collaboration between students at the universities of Virginia and Venda. Focused on creating ceramic technologies for point-of-use water treatment, the organisation has created factories in South Africa where local women produce the ceramic filters (using local materials) that will safely remove toxins from their community’s water.

9. **EMBRACE SEIZURE-SENSING WRISTBAND**
   "Understand, track, and monitor seizures."
   Sudden unexpected death in epilepsy (SUDEP) can occur minutes after a seizure. Embrace is a beautiful, thin wristband that monitors a wearer’s stress signals – by tracking pulse, body motion, temperature, and electrodermal activity (EDA) – and it can detect a potentially fatal grand mal seizure. Embrace then warns the wearer, as well as caregivers, so they can take necessary action.

---

Danielle Zurovcik (MIT)
Kenneth Shinozuka
Rohan Paul (Rhodes-Oxford & IIT-Delhi scholar)
Students at the University of Virginia in partnership with the University of Venda, South Africa
Matteo Lai (Politecnico di Milano) and Rosalind Picard (MIT)
What are the most important things that schools can do to ensure students have a great study abroad experience?

“The student’s experience on the first day can impact their overall experience. Remember your own experience travelling abroad and try to create support mechanisms to address the challenges, like airport arrival and transportation to school.”

Bronwyn Jenkins-Deas, Associate Dean, University Extension, and Director, International Education Programs, University of California, Riverside

“Offer a robust credit transfer system, diligent risk management, and well-articulated learning outcomes.”

Baihua Chadwick, Associate Vice-President, International, and CEO TRU World Global Operations, Thompson Rivers University

“Schools need to have active and engaging teaching methods supported by great student services and activities. Encourage students to learn new cultures and make lifelong friends whilst travelling abroad.”

Julian Wilson, Director, Institute of Continuing & TESOL Education, The University of Queensland

“Unbeatable customer service from the moment the student arrives until the moment they leave. This will be a key differentiator in quality in the future.”

Justin Quinn, Managing Director, CES Centre of English Studies

“Employ faculty experienced in working with international students (to encourage interactive discussions) and target a minimum of 30% foreign students (to ensure the school has the experience to accommodate them.)”

Sascha E. Liebhardt, Chancellor, New European College
Borderless payments powering international education
We’re StudyPay
 PerspecTiveS: aGEnts

What are the most important things that schools can do to ensure students have a great study abroad experience?

“Clear communication before arrival, extensive pre-departure orientation, and international student services upon arrival on campus.”

Irmak Otrac, Manager, ASBA Education Consulting

“First impressions count! Orientation creates the platform that ensures international students have access to academic and personal support, mentoring, and social integration that is essential for a successful and rewarding experience.”

Mark Lucas, Director, Global Administration & Business Development, iae GLOBAL

“Good learning systems with progress reports and comfortable school facilities with caring staff. Secure a similar age range and nationality mix, understand different cultures, and provide good social and cultural activities, plus outstanding accommodations.”

José Carlos Hauer Santos Jr., President, Student Travel Bureau

“Study abroad is not only about study but about culture and life experience. Schools should pay more attention to students’ out-of-class time and provide students in advance with information about these opportunities.”

Sergey Kuzmintsev, Deputy Director, Students International

“Introduce policies and a framework to increase the cross-cultural experience by encouraging local and international students to intermix in various forums.”

Naveen Chopra, Chairman, N & N Chopra Consultants
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Silvina Berry, Head of Agent Sales
sberry@eurocentres.com

eurocentres.com/en/agents
What are the most important things that schools can do to ensure students have a great study abroad experience?

“Schools should ensure that students come into contact with as many local people as possible. This allows the student to understand the local culture and create intercultural exchange.”

Rano W. Mikhail, Hannover, Germany, Master’s Programme in Intelligent Systems, Peter the Great St. Petersburg Polytechnic University

“The most important thing a school can do is to provide opportunities for learning outside the school – activities with other students. The classes on their own are not enough. Activities where students can practise English and learn from each other can make a big difference.”

Kittivit Chinsoponsup
Bangkok, Thailand,
General English, UIC English

“Get students involved in local community events and service-learning activities.”

Alexander Sanso, Monroe, New York, Jamaica Field Service Abroad Program, SUNY Potsdam

“The most important thing schools can do is support students. With support, students can overcome their fears and doubts. They can achieve their goals and keep learning day by day!”

Asmaa Youssef, Como, Italy, International Trade Program, Canadian College

“I think the school should provide instruction to small groups, and social programmes are a good way to learn English. Students can meet a lot of different people and improve their English with them. And if students have a problem, the teachers and the school staff are always there to help them.”

Carla Saura Garcia, Castellón, Spain, General English, Oxford International
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STAFF INSIGHTS:
How has technological change affected agents?

"Digital channels like online, mobile, and chat are now vital to agents’ recruitment efforts. If you visit agency websites, you will immediately see a chat window or an invitation to send SMS via KakaoTalk for an immediate response (KakaoTalk is a Korean version of WhatsApp)."
– Sunhee Kang

"Agents report that most of their promotions are now focused online and that a majority of inquiries come through company websites or other digital channels. They are expecting an even greater focus on social media marketing in the future.”
– Sergey Krasnyanskiy

"Over the past ten years, technological change has had a huge impact, especially things like social media, WhatsApp, and Skype. In Africa, agents’ Facebook pages can be even more important than their websites. In fact, social media seems to be replacing most channels of delivering news and information and achieving brand awareness.”
– Seher Neöz

"Social media is now agents’ favourite promotion tool as it helps them to keep in touch with customers almost 24/7. WeChat messages work faster and are more personal than emails or phone calls. Students do not need to go to agents’ offices as much as they used to since they can both send documents via WeChat and pay fees.”
– Albert An

"Agents are reporting a very substantial shift of marketing resources from print and events to online. Basically, they are following students’ movement to online channels. Agents are also using online for communications with schools, especially things like Skype that make it easy to have video chats and meetings.”
– Nabil Najd

"Agents tell us that students are mostly using online channels now to search for information on study abroad. That means the agents have to make effective use of social media and other digital channels as well. Some of these same tools are also helping agents and schools to stay in closer touch with ongoing training and information sharing.”
– Karin Florez

THE ICEF AGENT TEAM is responsible for screening and selecting quality education agents. Based in offices around the world, the team is composed of fifteen Agent Relations Managers and several additional support staff, some of whom are pictured here at the 2015 ICEF Berlin Workshop.

FRONT ROW, FROM LEFT: Nabil Najd, Tiffany Egler (Director, Agent Relations), Seher Neöz, Stephanie Zimmermann, Hoang Le, Merdina Mostarlic. BACK ROW, FROM LEFT: Mirna Hodzik, Karin Florez, Renata Tylaeva; Sergey Krasnyanskiy, Kevin Neven. NOT PICTURED: Albert An, Sunhee Kang, Ayumi Henke-Tokushige, Diana Forman, Stefanie Fendrich, Fabiola Martinez Mata, Marlene Bauz, Lisa Wlasche, Ani Khachikian.
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HOW ONLINE & MOBILE TECHNOLOGIES ARE TRANSFORMING LANGUAGE LEARNING

ANYTIME, ANYWHERE

Could the key to learning a new language be in your pocket? Or maybe on your desk or in your backpack? Web and mobile language learning technologies are boosting how quickly, affordably, and efficiently students can get started in another language.
Language travel remains a dynamic and growing market. Nearly 2.3 million students went abroad for language study in 2014, and many of these students did so as a foundation for further study overseas.

At the same time, many traditional sending markets are investing heavily in language teaching within their domestic education systems, meaning that additional students have an opportunity to develop greater proficiency without (or at least prior to) going abroad. Moreover, growing numbers of students are using online resources for language study, everything from free YouTube tutorials to MOOCs to paid online services offered by industry stalwarts such as Rosetta Stone. These trends are spurring the proliferation of language apps and leading some traditional language schools to enhance their offerings using online technologies.

Language schools are tapping into tech-enabled language learning in a variety of ways. Some schools offer online courses for inbound students or follow-up training for alumni. Others provide standalone courses online that may or may not be directly linked to face-to-face programmes abroad. And still others are finding entirely new business models built around technology-enabled language teaching.

These new models and experiments create a dynamic between traditional and emerging forms of delivering language learning that will play an important role in shaping demand for study abroad in the years ahead.

It’s in your pocket

With a reported 150 million users and an active user base of 30 million students per month, the language learning app Duolingo is the most downloaded education app for both Apple and Android devices. While education apps represent only about 5% of global iOS downloads, the category is a lively one, with year-over-year growth of 13% through the second quarter of 2016.

Even against that backdrop, the adoption rate for Duolingo is particularly impressive. Launched in 2012, the company has raised more than US$80 million in venture financing to date and claims not to have spent any of it on marketing. Rather, the company attributes its phenomenal growth curve to a highly engaging, gamified approach – all underpinned by clever machine learning technology – and to the tremendous word-of-mouth promotion the app has received.
With an active user base of 30 million students per month, Duolingo is the most downloaded education app.

Students can use Duolingo to study multiple languages, with the options varying according to the user’s native language. Most students on the service are using it to learn English, but English speakers can use it to study Spanish, French, and 14 additional European languages.

The industry-tracking service App Annie reports that the number of Duolingo users in markets such as Brazil and Ukraine is roughly equivalent to the population of students enrolled in high-school or university foreign-language courses in each country. App Annie’s vice-president of marketing communications, Fabien Pierre-Nicolas, said in a recent interview with Forbes that “in some countries … we’re seeing that around 5% of the total smartphone population is using Duolingo. For the sake of comparison, about 10% of smartphone users in the US are playing Pokémon Go right now, and everyone is talking about it.”

School is still in

Although a service like Duolingo comes from the tech industry, there are many examples of interesting technology-enabled options being introduced by institutions or schools.

The UK-based online provider Epigeum, for example, offers a fully online English for Academic Studies programme developed in collaboration with 25 higher education institutions in Australia, the UK, and seven other countries.

In Peru, the El Sol Escuela de Español has spun out an entirely separate sister school on the web. El Sol focuses mainly on teaching Spanish to international students who come to Peru for an immersion experience. But the online school – Web Spanish – has developed into a distinct business over the past 10 years with its own brand, curriculum, teaching staff, and clientele. “It’s a different kind of instruction and we teach people differently than we
do in the classroom," says owner Alan La Rue. “Even so, I thought initially it would be the same client base, but in practice it hasn’t worked out that way. In fact, we’re attracting an older clientele [online] who live mostly in the United States.”

Perhaps one of the more innovative uses of technology by an established language school is from Vancouver-based Canadian College of English Language. Educators there began working on some initial computer-based course material in 2011, leading to a three-month pilot of CCEL’s first “paperless classroom.” The trial proved so popular that it expanded to a more wholesale adoption of technology-based learning throughout the school. It also led, in 2012, to the development of a standalone language curriculum and learning system called Smrt English that’s now being licensed to partner institutions in Mexico, Brazil, China, and Saudi Arabia.

Nearly 75,000 students now use Smrt English across 165 institutions, and the service has taken shape as a blended learning platform that allows students to combine in-class instruction with independent study outside of school hours. The combination has proven to be extremely popular and also highly effective: on average, Smrt English students progress through the English curriculum about 25% faster than those who pursue in-class studies alone. “Many students have prior experience with language learning and technology via apps or other online services,” says Smrt CMO Zach Taylor in explaining the appeal for students. “And fundamentally, students are heavily engaged with technology anyway.”

Building on that affinity for all things tech, the service is now poised for more international expansion. “We don’t want to change how teachers teach,” says Mr Taylor. “But we want to change the culture around English learning by engaging students and teachers in a much more effective way and at a much earlier age. Students should not be at a beginner level [of English] in high school or university. They should be ready for much bigger things.”
MARKETING AND SALES SERVICES FOR EDUCATIONAL INSTITUTIONS

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(Outside and In-Market Sales Representation)

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Educators and agents are looking for more streamlined, efficient processes in their working relationships, and new technology systems are helping...
hen you stop and think about it for a moment, the international education marketplace is quite fragmented. There are tens of thousands of education agents operating around the world and just as many institutions recruiting international students.

The number of internationally mobile students continues to increase. And the ways we all communicate and do business with each other are expanding all the time as well. Add to this the fact that more institutions are now working with education agents, and that many of those schools are diversifying their enrolments by expanding to new markets.

All these factors contribute to a more complex working environment for international educators, one in which agents have to keep track of more schools as well as greater volumes of student inquiries and referrals for study abroad.

“You get the sense that people are more and more frustrated with the way things work,” says Edvisor CEO Nicolas Miller. “The number of partnerships per agency or per school is going up, which makes any inefficiencies in how people work together much more apparent.”

Edvisor is an example of a new category of industry player emerging in the industry, one that leverages technology to improve operations and business processes for both educators and agents.

These companies are building purpose-built management software, customer relationship management systems (CRMs) in particular, for agencies. In addition to Edvisor, new entrants include Book&Learn and Agentcis – as well as the long-standing AMS - Agency Management Software platform, which was recently relaunched as a cloud-based service. With the exception of AMS, each of these platforms has become commercially available within the past two years, and each has begun to establish a user base among education agencies.

Edvisor appears to be the most widely adopted platform, with a reported base of more than 1,100 agents. AMS reports 550 agent-users on its service and Book&Learn claims nearly 430. Agentcis, which began to roll out in a closed pilot in mid-2016, will be commercially released later this year.
Agencies use CRMs to manage internal operations, including staff and branch offices; CRMs are also used to manage customer files and track students’ progress through the various stages of inquiry, booking, and beyond. They also provide an efficient way to manage product and pricing information, generate comparative quotes, and handle communications and application processes.

That last point underscores one of the main problems that CRMs aim to solve. Most allow agents to file applications with schools from within the CRM, with the goal of making it easier to create and track applications. “It is time consuming for most agents to file applications,” observes Mr Miller. “You have to fill out application forms by hand and send them off to different places, and there is a lot of back and forth with the school.” Bringing the application process into the CRM can streamline those workflows.

For agents, the wider availability of purpose-built CRMs offers a new opportunity to improve operations with tools that would have previously been available only to the largest agencies. “The big agencies have usually customised something or built something from scratch that they have spent a few million dollars on,” says Mr Miller. “Even if the systems are quite hard to maintain or use, they are really well-tailored around the agent’s needs.”

Beyond those large players that can afford to invest at that level, however, is a much wider field of small and medium-sized agents. And it is those firms that often form the core of the user base for specialised commercial systems such as AMS, Edvisor, or Book&Learn. An agency CRM “is quite valuable for any agency that has more than a few staff,” adds Mr Miller. And indeed, most commercially available agency CRMs are designed to be affordable and reasonably easy to use for agencies of all sizes. Most systems also provide customisable workflows that can be adapted to suit the needs of individual agencies.

But while these specialised CRMs are a boost for agency operations, they do not fully resolve the problem we began to explore earlier in terms of smoothing communications and business processes between agencies and schools. Some software providers clearly see this as the next significant opportunity in this space. Indeed, some are now coming to market with integrated systems designed to be used by both agencies and institutions.

Edvisor, for example, will introduce a new product for educators in autumn 2016. It allows schools to easily circulate up-to-date programme information and pricing to agents, including the management of country-specific or time-limited discounts. By integrating business processes for both agencies and schools within a single platform, this next generation of management software aims to streamline how agencies and schools work together. In the process, such systems also allow for more efficient management of the expanding number of partnerships that so many agencies and schools have today.
Some of the players in a new service category that is changing how agencies and schools exchange information, submit applications, stay in touch, and manage student files.
RECRUITING ON SCREEN

Knowing how students search for schools and use social media is crucial for informing recruitment strategies.
There is a distinction to be made between digital tools, such as online search and school selection sites, and social media. A 2015 Chegg study found that the former are highly influential in the discovery phase of students’ research, when they are learning about different institutions and trying to identify schools that could be a good fit. Social media comes into play after that initial discovery process as students further inform their choices.

In many markets, social media platforms are where interested students find points of contact with institutions. Importantly, applicants very much prefer to initiate contact with college or school staff – rather than be approached by them – on social networks. Prospective students’ priority on social platforms is largely connecting with current students or alumni to hear what they have to say about a school.

Enabling peer-to-peer interactions, listening carefully to students on social networks, and responding via the same channels that students use to talk with your institution are key to engaging effectively with prospects.

“The student decision journey has moved online,” Google said in 2013. “One in ten prospective students now search exclusively online for classes and programmes.”

In the years since, the proportion of prospective students who use mainly digital channels to choose study options has only grown. Fortunately, so too has the body of research that helps us to understand how this online behaviour is taking shape.

Nearly two-thirds of the agents responding to the 2015 ICEF i-graduate Agent Barometer survey indicated that 20% or more of their leads came from online sources in 2015; for nearly a third of agents, online sources accounted for 40% or more of total leads. In a recent Languages Canada survey, language schools reported that 28% of their bookings came via online or other direct channels, and global surveys such as IALC’s Study Travel Research Report 2016 have found that online and other direct channel bookings make up about the same proportion.

Meanwhile, there has been a pronounced shift in marketing spending among institutions in favour of digital channels. For example, nearly two-thirds (63%) of respondents to a 2015 UniQuest survey said their digital marketing budgets would increase in 2016/17, with most of that new money bound for social and search marketing.

The implication is that digital channels have become crucial for international recruitment. Online strategies should therefore command both a greater share of marketing budgets and more senior management attention than has been the case in the past.
How and when students use social media varies from country to country. In some markets, such as China and Russia, homegrown social networks lead the market – for example, WeChat and QQ (Qzone) in China and VK (VKontakte) in Russia. In other countries, the major global platforms dominate. Facebook, for instance, has been widely adopted in the Middle East, with 89% of web users active on the platform.

It’s important to understand the extent to which social media factors into overall Internet use in various markets. In China, for example, most people experience the Internet through social and mobile platforms; social media is very influential among prospective students. A 2016 Chegg survey found that nearly 90% of prospective students from China use social media when deciding on a university or school, and for 70% of those students, a smartphone is their primary research device. Roughly 9 in 10 prospective Chinese students check school information online, 4 in 10 watch videos from institutions, and almost 1 in 3 post questions to school representatives on social media.

Google research – based on massive volumes of education-specific search queries year-over-year – consistently finds that unbranded searching is very common in the early stages of prospective students’ discovery process. As many as 9 in 10 prospects don’t have a particular school in mind when they begin their search process and their search behaviour reflects this lack of brand orientation.

Rather than searching for a specific institution, prospects are far more likely to search by programme name or type, often in association with a particular country or region. At this stage, most students are searching for programmes, admissions information, and details about campus life.

This strong bias towards unbranded searches has led Google to recommend that education marketers target their search marketing efforts to promoting particular programmes in specific locations.
Students use mobile devices heavily during the discovery phase of the college search process. In many markets, a majority of prospects make their first visits to college websites on their mobile devices, and significant proportions apply to institutions from their phones.

Institutional websites must therefore deliver an excellent mobile device user experience. Key information – including programme, admissions, and student life details – must be easy to find, and key conversion points, including inquiry and application functions as well as a prominent “book now” or “apply now” button, need to be well optimised for mobile.

The authors of the 2015 Chegg report on the role of digital channels in college searches wrote, “If you aren’t pulling up your website and application on your phone right now to see what it looks like, we recommend you pause and do so before reading any further.”

Reflecting both the on-demand nature of online channels and the natural impatience of digital natives, prospects expect to hear back from schools quickly if they ask a question or request further information. Most prospective students will expect to hear back within 24 hours of making an enquiry.

We have seen a rapid expansion of student search and discovery activity in online channels over the past three years. Even so, this feels like the beginning of a trend towards an increasing emphasis on online marketing and recruitment in the years ahead.
INTERNATIONAL STUDENTS are a part of our campuses and communities. They want an excellent education, to feel welcome in their new city, and to transform themselves through exposure to a new culture and life-changing experiences. International students want to develop friendships, expand professional networks, engage through volunteering, secure employment, and become part of the local community.

Mohawk College is located in the city of Hamilton, Ontario, midway between Toronto and Niagara Falls. Last year, the college convened the InterAct Summit, which brought together leaders from education, industry, and the community to discuss best opportunities for supporting international students. “Passive acceptance isn’t enough to make our communities attractive destinations,” said Keith Monrose, Mohawk’s Dean, International. “It takes all sectors — academia, business, and community — working together to provide infrastructure, opportunity, and support for newcomers to create a truly welcoming environment.”

At the Summit’s conclusion, the college committed to several investments to move from being “friendly” to truly “welcoming” to international students. These included:

- The Language and Culture Centre – a community hub for international activities;
- Entrepreneurial programmes that offer international student mentorship and business start-up support;
- Transition support that includes volunteers, peer-mentors, and intercultural counselling.

For more information on the college’s welcoming environment, please check out the 2016 Mohawk Agent Tour video at www.mohawkcollege.ca/international-students/agent-information

“It is such a great college environment: labs, classes, teachers, and staff. And there are great job opportunities for students and graduates. I actually applied for a job as a barista at Starbucks (on campus) and was working there even before my classes started in September! Hamilton is safe and fun and much more affordable than studying in bigger cities in Canada.” – Gregory Kovalevsky, studying Mechanical Engineering Technology at Mohawk

“When I visited Mohawk College during their 2016 Agent tour, I was amazed at the brand-new modern campus and friendly and professional staff. Now I know every person who will work with my students from application to help in finding jobs. Mohawk College and its staff can be described by one sentence which welcomes you when you enter the door: “We love our students.” They really do!” – Marina Pivovarova, SIMPLEX, Ukraine
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TRENDS: EXPERIMENTATION

MAKING SPACE FOR INNOVATION

A growing number of universities are redesigning their learning spaces to attract inventors and innovators to their campuses.

The first sentence of the US Chamber of Commerce’s “Enterprising States” whitepaper is simply, “Innovation drives economic growth.” This statement is powerful precisely because it is so true. Over the past two decades in the US, young start-up companies have been responsible for the bulk of job creation. And today, roughly one-third of American workers are employed in freelance, or project-based, work. In Europe, many countries now have visa classes and extended work permits on offer to attract foreign investment and entrepreneurs and to stimulate start-up businesses in priority sectors.

But in North America and Europe, some economists are concerned that their countries are falling behind on measurable indicators of innovation. And they are looking to higher education as part of the solution, encouraging universities to increase their capacity to inspire and
Innovation hubs attract high-performing prospective students

commercialise research (i.e., transfer the monetary value of research to the overall economy).

This year, for example, the Conference Board of Canada said that because of insufficient knowledge transfer between research universities and industries, “Canadian companies are rarely at the leading edge of new technology and too often find themselves a generation or more behind the productivity growth achieved by global industry leaders.” The assessment came in a year in which Canada ranked 13th among 16 peer countries on measures of innovation – behind competitors such as Switzerland, Sweden, Denmark, the Netherlands, Finland, and Ireland.

The growing move towards interdisciplinary studies (see p. 58) is one reflection of how universities are responding to the need to supply entrepreneurial, project-minded students to their economies. Another is the growing number of innovation hubs – facilities designed to reinvigorate the idea of learning and creating.

These facilities can increase a university’s ability to attract high-performing prospective students and talented faculty.

SPACE MATTERS TO TOP UNIVERSITY PROSPECTS

Increasingly, some universities are realising that innovation-branded facilities can be competitive strengths in a landscape where many schools still struggle to break out of traditional learning models. For example, the University of Waterloo’s $88 million investment in an engineering building boasting state-of-the-art study and community spaces is explicitly intended to attract students. Feridun Hamdullahpur, the president and vice-chancellor of the university, notes that “Continuing to transform our campus with first-class facilities like this will allow us to attract top talent to Waterloo.”

And in 2015, when Harvard Initiative for Learning and Teaching (HILT) director Erin Driver-Linn spoke with the university’s administrators and support staff, improving learning spaces emerged as the top priority for enhancing the quality of instruction at Harvard.

If Harvard is on board, you can guess that innovation spaces are an idea whose time has come – and that students will be paying attention.

WHAT DOES INNOVATION LOOK LIKE?

Innovation hubs are designed to encourage students to be comfortable:

• Experimenting and “breaking things” as part of the creation process;
• Working on multi-contributor projects;
• Shifting gears and developing new skills as the need arises.

The University of Calgary has just launched its new Taylor Institute for Teaching and Learning; an article in the university’s online newspaper describes what the new space is meant to foster:

“It looks like a group of students participating in a thought-provoking discussion using instant messaging with their collective thoughts being projected onto a large screen. It looks like learning spaces that are fully flexible: tables, chairs, screens, whiteboards and instructors’ stations that can be arranged in any configuration ... The transparent design of the learning spaces allows others to observe teaching in action and brings teaching into the open.”

Innovation also often looks brand new, since many campus innovation hubs have been built so recently. Ultramodern spaces – almost always portrayed through sophisticated promotional photography – work to connote prestige and a cutting-edge approach to education.

Times Higher Education reported last year on a British survey of over 2,000 students that found that more students (67%) were influenced by a university’s facilities than by its reputation (47%) when deciding where to study. Only the
university’s course offerings (79%) were significantly more important to students than facilities; location was important to 69%, just two percentage points above facilities.

**BEYOND DOLLAR SIGNS AND SQUARE INCHES**

Of course not every school can sink millions into an innovation hub. But most can allocate time and resources to making their spaces feel more inviting and inspiring. For example, schools could:

1. **Change classroom configurations** and introduce creative, though affordable, “makerspaces.” A makerspace has been defined as “a place where students can gather to create, invent, tinker, explore and discover using a variety of tools and materials.”

2. **Integrate more collaborative projects** into their courses.

3. **Make an effort to create more inclusive and energised events**, online networks, community spaces, and extra-curricular opportunities. Innovation depends as much on students feeling comfortable speaking up, joining discussions, and brainstorming as it does on state-of-the-art technology.

4. **Strengthen relationships with industry leaders** and ask successful entrepreneurs to speak in classrooms. Schools could develop exciting internship opportunities for more students.

5. **Improve the welcoming space prospective students encounter** when coming to explore the campus to decide whether they want to attend, and have engaging current students on hand to talk about the amazing projects and research they’re involved in.

These options represent a move towards the dynamic, experimental, and collaboratively minded spirit students are beginning to expect from universities as they consider how best to prepare themselves for today’s more entrepreneurial work culture.
STEM: NOT JUST FOR TECHNICAL CAREERS
iD TECH SUMMER CAMPS

FOR MANY PARENTS AND students, the potential benefits of STEM education can be hard to understand. Sure, the acronym stands for science, technology, engineering, and mathematics, but what do educators, college admissions officers, and hiring managers actually mean when they talk about the importance of STEM studies?

STEM education teaches not only specific hard skills needed to advance in technical fields but also soft skills – such as creativity, problem-solving, spatial awareness, and if-then reasoning – that lay the foundation for successful careers of any kind.

These soft skills are frequently overlooked, and all too often students graduate high school with the idea that they are simply not suited for STEM programmes. As a result, nearly 1 million STEM-related jobs will go unfilled by 2020 because of a gap in the labour force.

At iD Tech summer technology camps for kids and teens, we emphasise the value of STEM skills across all fields.

STEM skills for any career path
College grads with STEM degrees are finding careers in a diverse array of fields, from traditional STEM industries such as aerospace and medicine to unexpected opportunities in the entertainment, fashion, and food industries.

STEM skills prepare students for more jobs in science or tech. For example:
- Geometric reasoning can help artists improve their craft;
- If-then thinking is essential when studying economics;
- Expertly honed creativity and problem-solving skills can help a job candidate stand out in any field.

Building a rich foundation of knowledge
Studies show that students are more likely to pursue STEM if they are introduced to the topics at an early age. Programmes that connect the topics of study to real life have also been shown to increase a child’s chances of pursuing STEM in college and beyond.

At iD Tech’s one- and two-week summer camps, instructors make sure to connect engineering and technology principles to hobbies and passions that their students are already pursuing. By providing STEM experiences in the context of students’ interests, iD Tech helps students apply STEM skills in any venture they pursue, whether that’s landing an internship at Google or Facebook, founding a non-profit, or pursuing a STEM career.

Looking toward bright futures
Specific STEM skills – like programming knowledge – can give students incredible flexibility in the workforce. Tech companies have named programming the universal language of the future. If you can speak eloquently and purposefully to computers, you can land a job anywhere in the world.

But most importantly, students who enter college with a strong STEM background have the foundation necessary to pursue many career paths.

An introduction to STEM should be fun and provide students with the confidence they need to pursue a career that excites them.
The allure of niche marketing

Targeting discrete segments can help you attract students who are the right fit for your school – and it can also be a competitive advantage.

The more competitive and mature an industry is, the more creative and thoughtful its players must be in their strategies to maintain or grow market share. We are at that stage in international education. As a result, niche marketing strategies are particularly relevant today.

What is a niche?
Niche marketing is based on the reality that no business can be all things to all people. BusinessDictionary.com defines a market niche as “a small but profitable segment of a market suitable for focused attention by a marketer,” and explains that,

“Market niches do not exist by themselves, but are created by identifying needs or wants that are not being addressed by competitors, and by offering products that satisfy them.”
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TODAY, DATA SCIENCE AND predictive analytical expertise are among the most sought-after skillsets in the global marketplace, and data scientists report both high job satisfaction and high incomes, according to Forbes. Forbes reports that “Data scientists [have] a leg up in a world increasingly turning to data for decision making.” The good news is that you don’t have to be a specialist in maths or science to be a data analyst. The best data analysts are often business and marketing professionals who have a grasp of statistics and who can work with computer programming to add a valuable competitive edge to companies.

What do data analysts do?
Data science and predictive analytics fuel everything from the personalised shopping and entertainment recommendations of Amazon, eBay, and Netflix to the ability of companies to increase sales, fine-tune marketing and advertising, respond quickly to customer comments and complaints, manage inventory, and much more. Data analysts assemble data, extract insights from it, and then explain to executives within their companies how best to use it. Depending on their sector, they can help to solve criminal cases, predict voting behaviour, see what customers are liking and not liking, or provide real-time feedback on patients’ health to doctors.

Learn data analysis in one of America’s safest, most vibrant cities
Every year, the University of California, Irvine (UCI) International Programs offers a 12-week certificate programme in Data Science & Predictive Analytics for Business Professionals that enrolls students from around the world. During the intensive programme, leading data science practitioners introduce students to the most popular and effective methods and systems used today.

What’s more, the programme can serve as the first step towards internship opportunities with 200+ companies in the UCI database.

UCI is located near the coast between Los Angeles and San Diego. As well as being a serious business and research hub, the city of Irvine has been ranked among the safest in America. U.S. News & World Report ranks UCI as the ninth best American public university from a field of hundreds.

What is it like to take UCI’s Data Science & Predictive Analytics for Business Professionals certificate programme?
Classes are highly participative, with students working in teams on projects simulating a real-world experience. Students have the opportunity to explore the beauty of California, including Los Angeles, San Diego, and San Francisco, along with field trips to local companies. Many students secure unpaid internship positions in the United States that can lead to Optional Practical Training (OPT) work after studies as well as permanent data analyst positions at top companies all over the world. For more information, please email ip@ce.uci.edu.
ICEF Monitor reported earlier this year on a current example of a market niche: Brazilian students interested in pursuing professionally oriented English-language courses (e.g., English for Engineering, English for Nursing and Healthcare) rather than general ELT. Stressed by the troubles of their economy and less-certain job prospects, a growing segment of Brazilian students want to ensure the English they acquire serves a purpose: getting them a job.

Language schools responding to this market niche might develop new, specialised ELT courses. They might offer early-bird discounts to respond to Brazilian students’ cost-consciousness. They might even create a series of free webinars offering general ELT to prospective students in Brazil to demonstrate what students can look forward to if they continue on to professionally focused courses.

By identifying a niche – and then adjusting programming, operations, and promotions accordingly – a school can differentiate itself from competitors and claim new market share.

**TIPS FOR CREATING A DISTINCT NICHE**

Think about the characteristics of current students and recent alumni. What were they looking for when they were researching schools and programmes – and how did they discover your school? What do students and alumni think your school does best? Jot down the findings that recur, and also note what isn’t being mentioned. If students aren’t mentioning something, it’s likely not a competitive differentiator for your school and might even be an area of weakness.

Pay attention to the trends being covered in market intelligence publications. Are there any that are relevant to your markets and programmes? The following examples illustrate how such research could inform a niche market strategy:

- Japanese and Korean students are becoming increasingly interested in the Philippines for English-language training;
- In the past decade, the percentage of American students studying abroad for eight weeks or less during the academic year has nearly doubled;
- There is growing interest in Vietnam for vocational programmes and a fall-off in demand for higher education degrees.

Talk to your partners overseas: agents, schools, and other stakeholders. Get their insights on where market demand is going and look for ways to accommodate the trend.

Remember that niche marketing works when it identifies needs that are not being met by the competition. And when you identify the segment you aim to serve, make sure you do it better – or using a different angle – than anyone else in the space. Hotel executive Michael Levie made a great analogy when he spoke about niche marketing to Harvard Business Review:

“I think that when you decide on a niche market, when you decide on what you want to be doing, do that extremely well and don’t do other things. [Other hotels
TRENDS: RECRUITING

in] the industry create hotels that midweek should be good for a business traveler. On the weekends it should [also] be good for a group or a wedding party, or for family travel. Good luck! It ain’t happening. ... Decide who you want to be and be very good at it!”

For each niche you are interested in, put yourself in the shoes of the student and answer the questions, “What do I want? What can I afford? What must a school do for me if I am to value my experience studying there? What’s the best way of reaching me and engaging me?” The answers will inform pricing, programming, strategies for positive student experiences, and ideal marketing tactics.

Keep your promises. As always, the key to the success of a niche strategy – or any competitive strategy for that matter – is that the student experience matches your marketing promises. So ensure that programmes, facilities, and other factors affecting student experience are ready before you begin marketing to targeted students.

In your promotional materials, avoid jargon and go right to the heart of why your school is the best choice for your ideal students. Ensure you are on the right social media channels, fine-tune the messaging on your website if need be, and – crucially – invest in search engine optimisation to make it more likely your targeted students will find you in their online searches.

NICHE MARKETING REFLECTS DIVERSE STUDENT NEEDS

International students have diverse motivations for studying abroad, including age, geography, income, and education level, among many other possible differentiators. Identifying niches that can be well served by your school might be exactly what you need for a sustainable enrolment programme.

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Established in 1999, The Liverpool School of English offers General English, Business English, IELTS/Cambridge Preparation, Work Experience, Teacher Training, TKT and CLLT. We also offer mini stays and English + Football courses for groups all year round and Summer School for Juniors in Liverpool and London.

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INTERDISCIPLINARY LEARNING ON THE RISE

The popularity of interdisciplinary studies is growing in tandem with unprecedented world issues and a fast-moving marketplace.

Countless studies have shown that international students expect study abroad to lead to better employment outcomes. And today, a growing number of students are choosing an interdisciplinary course of study in the context of a marketplace where employers often speak of a mismatch between the skills they are looking for and the skills with which students are graduating.

**THE CONTEXT FOR CHANGE**

Students today are living at a time when:

1. **Workers – especially millennials – are staying in one job for a shorter time**, necessitating a need for a wider, evolving set of capabilities to facilitate the evolution of their careers. As Don Nutbeam, vice-chancellor of the University of Southampton, wrote in *The Guardian*, “the conventional career ladder [for graduates] is likely
to be replaced by a career 'lattice,' which may involve moving upwards or laterally, and possibly stopping and starting in new directions as the employment landscape changes."

2. Start-up culture and entrepreneurialism have emerged as important markers and elements of the global economy – and they are driven as much by personal interest, passion, and collaboration as by discrete skill sets. Being a successful entrepreneur often means addressing a problem in a better way than anyone has thought of before, and interdisciplinary studies are, by definition, concerned with tackling issues and problems.

3. Research on the most pressing issues of our times (e.g., climate change, the race for more sustainable technologies, cyber-security, and health epidemics) requires brain power from a diverse range of disciplines.

THE NEED FOR SOFT SKILLS
In addition, today’s employers are looking for an impressive set of “soft skills” from students applying for positions in their companies. At the 2014 IREG-7 Conference on Employability and Academic Rankings, participating companies and employers made a list of desired student competencies that included:

• An ability to work collaboratively with teams from a range of backgrounds and countries;
• Communication skills – speaking, listening, and writing;
• A high degree of drive, resilience, and enthusiasm;
• Leadership skills, including the ability to influence others and resolve conflicts;
• A capacity to develop new skills and behaviours in line with a rapidly developing market and global economy;
• An ability to absorb complex information quickly;
• An openness to and respect for perspectives from around the world;
• Multicultural learning agility – being able to adapt and learn in any culture or environment;
• Interdisciplinary knowledge such as technology skills, language skills, etc.

MANY HEADS ARE BETTER THAN ONE, OR EVEN TWO
Leading universities and colleges are listening to employers’ concerns and to students’ growing expectations that education have a career-based orientation. The normally gradual evolution of higher education curricula is giving way to a pace more suited to today’s research and industrial marketplace. This faster shift includes the creation of interdisciplinary – aka integrative – learning departments to complement, or serve as an alternative to, single- or dual-focus degrees. Between 2006/7 and 2011/12, the number of degrees conferred in interdisciplinary programmes in the US grew by 42%. The popularity

The age-old “forest versus trees” metaphor has been used to explain the advantages of interdisciplinary learning over single-focus learning. W. James Jacob of the Institute for International Studies in Education at the University of Pittsburgh wrote, “While disciplinary experts are essential for understanding particular ways of knowing within specific fields of study, their perspectives in addressing larger and more complex issues are often limited. [Interdisciplinary] approaches take a much broader view of the entire landscape, first by surveying the forest and afterwards drawing upon various tree experts depending on the needs, contexts and circumstances.”
Located in Miami, Florida, Divine Savior Academy offers students from around the world college-preparatory academics in a Christian environment. Students in the Divine Savior Academy International Program grow academically, spiritually, physically, and emotionally in a multicultural setting.

of such degrees is not limited to the US: universities in Canada, Europe, Asia, and Australia are also embracing the model.

Interdisciplinary studies are defined differently by various academics, but perhaps most straightforwardly by Jeffrey Koseff, a professor of civil and environmental engineering at Stanford University, who sums up interdisciplinary studies as “multiple disciplines blend[ing] together to produce a new discipline aimed at solving an issue.” Others would argue that the separate disciplines don’t blend so much as inform each other – but there is wide agreement on the idea that the goal of interdisciplinary studies is to solve big problems using a wide array of expertise.

Students with one set of interests and talents working with other students, professors, and professionals with completely different focuses is a cornerstone of interdisciplinary learning – for example, design students working with information technology specialists to increase the visual impact of a project, engineers working with psychology majors in pursuit of work spaces that foster employee well-being, or climate change scientists working with history and geography students focusing on Antarctica.

GOVERNMENTS ARE ON BOARD
Governments, in recognition of their labour market requirements and the collaborative research required for building knowledge economies, are increasingly interested in interdisciplinary learning. As one example, the European Union’s Modernising Universities initiative calls for universities to “redefine their education and research priorities by focusing more on research fields than scientific disciplines” and to ensure that graduates’ qualifications align with the labour market. The Modernising Universities agenda recognises that such an evolution will require universities to “revise their structures and organisations.”
WHAT INTERDISCIPLINARY LEARNING PROVIDES TO STUDENTS

Researchers have found that students graduate from interdisciplinary programmes with abilities suited to a quickly changing world and marketplace. These abilities include:

- Becoming accustomed to searching for a wider understanding of the elements of a problem;
- Balancing and integrating conflicting insights from several disciplines;
- Maintaining confidence in the face of challenges.

Such abilities match up with recent research showing that students want to develop soft skills to apply in their eventual jobs. In fact, 93% of 27,000 students from 22 countries surveyed by Laureate International Universities and Zogby Analytics agreed that colleges and universities should focus on teaching soft skills, such as accountability, nimbleness, negotiation, networking, collaboration, and communication.

The focus on education that includes interdisciplinary studies is increasing at the same time as interest in competency-based educational models – where students are measured on what they can do as opposed to how many credit hours they have banked – is growing. Both interdisciplinary studies and competency-based education part with tradition and aim to graduate students with skills needed for modern economies.

Amity Doolittle, a senior lecturer at Yale University, summed up the anti-traditional aspect of interdisciplinary studies this way: “Who doesn’t like to break boundaries? Studying within traditional disciplines means adopting labels such as, ‘I am a historian,’ or ‘I am a botanist,’ or ‘I am an artist.’ But with an interdisciplinary … focus you can draw together your multiple interests.”
Kids aged 18 and younger compose nearly half of ELT enrolments in some destinations, and there is a growing range of junior programmes to serve them.

Junior students have become an important growth segment in recent years, especially in Europe, where students under age 18 now compose a significant proportion of language travel enrolments. Juniors accounted for nearly half of all language students in the UK and Ireland (47% each) and Malta (48%) in 2015. However, just as the global English-language training (ELT) market slowed last year, 2015 also witnessed a less buoyant junior market in some destinations, relative to 2014. For example:

- In Canada, the number of junior students fell by 5.2% in 2015 compared with 2014;
- In the UK, the number of junior students in private English UK member schools decreased by 9%; average student weeks also fell;
- In Ireland, the junior market grew very modestly in 2015 – by 1%, compared with 19% in the adult segment;
Imagine you’re an ambitious, talented student aspiring to study at a leading university outside your home country, but there’s one hitch: you don’t have the English-language proficiency to be accepted. Nor, in fact, would you want to be accepted – not until you have the confidence in effectively using the English required to achieve success in a degree programme. Study abroad is a big investment, and those who make that investment want to ensure they are fully prepared to be successful.

But learning English can be overwhelming unless students find a nurturing programme that encourages their progress and inspires them to get to the next level. The ability to provide such a learning environment is a key reason INTO is among the top pathway providers in the world. INTO’s reputation has allowed the company to partner with top universities in the US, the UK, and now China.

Over the past couple of years, INTO has been offering a proprietary English language evaluation to accurately assess students’ English. INTO English Language Assessment (IELA), which functions as both an entrance and exit test, is a collaboration between INTO and Cambridge English Language Assessment, the world leader in the field of language assessment.

IELA is delivered online in a supervised environment in which each student receives different questions. It’s about two and a half hours long. Students from any country – including emerging markets that universities may be investing in – can take the test.

**Why adaptive testing matters**

IELA is adaptive, adjusting to students’ different levels and providing them with a clear vision of where they are in their English language skills and how much they need to progress. Students, agents, and INTO admissions staff can gain an excellent understanding of the INTO programme level into which students should be placed, providing efficiencies and reassurance to all.

Computer adaptive testing is increasingly well-regarded because:

- It exposes students to test items at appropriate levels of difficulty. This reduces students’ anxiety during test-taking (a threat to test validity) and allows them to demonstrate their best language performance on the test.
- It is shorter than linear tests, which helps to reduce students’ fatigue during test-taking (another threat to test validity).

The IELA adaptive test thus measures English proficiency in a less stressful environment than many other tests. And, because students take the IELA exam again at the end of their INTO programme, they can see how much their English has progressed as a result of studying with INTO.

Graduates receive a co-branded INTO and Cambridge English Language Assessment transcript, which then becomes part of their portfolio when they are ready for direct entry to INTO’s network of partner universities. With their new English skills, they’re on their way to success in higher education.
More than 200 language schools responding to a global ALTO survey reported a 3.8% decrease in junior student weeks in 2015, after a 9.1% increase in 2014.

Junior student flows are affected by some of the same pressures that influence the adult ELT market, including economic downturns in source markets, increased language-learning options in these markets, and language-learning technologies that can sometimes dampen demand for language travel.

But although there was an easing off of junior student demand in some markets in 2015, the future looks bright. Language schools are reporting that students are travelling to learn a language at ever-younger ages. Parents who have grown up in the age of globalisation know how integral English proficiency is for acceptance at a good university and to improving career prospects, and they are looking for safe and exciting programmes for children as young as four. Schools participating in the 2015 ALTO/Deloitte Travel Industry Survey indicated that of their junior student enrolments (28% of total enrolments across the 228 schools represented), nearly half (12%) were students aged 16 and under (versus 16% for 16–18-year-olds).

WHERE THERE’S A NICHE, THERE’S A WAY
The adult language-learning market has lately been characterised by increased demand for professionally or academically oriented English-language programmes as well as for recreation-heavy offerings (e.g., English Plus Tennis, English Plus Art and Design). General English has become less of a source of growth, according to many schools and agents.

Similarly, more specialised programming is also a trend in the junior market. Speaking with Study Travel Magazine, Thom Jones of Inspiring Learning – a British company that provides ski trips and adventure activities to enhance English-language learning – noted of the junior market that “… there has been excellent growth and real vigour, but the markets are changing too and demanding something new, both in terms of academic ‘currency’ and experiences.”

There is a lot “new” to choose from, especially in the form of English Plus programmes. Junior students today can pair English learning with sports, drama, design, computer programming, and countless other interests. But not all “plusses” are equal; some are special enough that they form the basis for premium pricing on top of the normal English Plus fees. For example, Alpadia Summer Camps – offered in Switzerland, France, Germany, and England – include numerous activities within their standard pricing, then charge a premium for extra activities, including creative arts, cooking, horseback riding, mountain hiking, and adventure sports.

AGE MATTERS
Another segment of the junior market that some schools are catering to is families, with programmes in which families travel and study together (albeit with juniors and seniors in
separate classes). This niche is especially important for schools with programming for the youngest students in the junior age range whose parents feel more comfortable being with their children as they travel to learn English.

At the older end of the segment, there is a growing supply of courses geared to preparing students for university and careers, whether through exam preparation, internships, resume-building, or study skills workshops.

Across the junior age range, ELT providers are factoring in the various ways students like to learn, such as one-to-one homestays with tutors, amidst luxury facilities and accommodations, in immersive language villages with no technology, or using sophisticated apps and technologies.

Specialised programming in the junior ELT market reflects an intensified competitive landscape as well as increasing demand among students’ families for unique experiences. But at the end of the day, if a junior programme doesn’t produce notably better English proficiency for students, it will pay the price through bad word-of-mouth – magnified by the lens of social media. Speaking with Study Travel Magazine, Remco Weeda of Ceran Lingua International in Belgium summed up the balance short-term junior programmes must strike: “Once students feel that their needs are met and that they are really learning, the value of the course is easily identified. The activities, programmes, excursions, and sports coaching then become a very welcome bonus.”

MORE DEMAND, MORE COMPETITION

The junior segment has been a bright spot in a global language travel market that has seen more intense competition and slower growth in recent years. Looking ahead, we can expect greater competition for junior students as the market continues to develop.
Past
1 Summer School
First Student tours
1821 students

1991

Present
25 Summer Schools
650 Student tours
2 A Level / GCSE Colleges
5 University Partnerships
2 University Pathways
Operations in UK, Canada and USA
54,118 students!

2016

Future
Development in our university partnerships and pathways
New d’Overbroeck’s sixth form campus and boarding house in Oxford

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Oxford International was founded in 1991 by Robert Darell and David Brown, with the help of Prince Charles’ Business Trust (they lent us the money)!

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Some very significant developments are on the horizon, with further university partnerships planned to offer an even greater range of courses and an exciting new d’Overbroeck’s Oxford sixth form college and boarding school opening in September 2017.

The next 25 years certainly look as though they will be even busier!

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Ideas for taking your brand to the next level and expanding your audience

1. MAKE EVERY (TOUCH) POINT COUNT

Every interaction a consumer has with a brand contributes to their perception of it. Apple began proving this years ago, identifying countless opportunities to make Apple products – and the experience of buying them – feel special. What do customers see when they open a new Apple product? How is everything arranged and presented? What happens when customers walk into an Apple store? What is the space like? How are the products showcased? Can customers find someone to help them? Can they pay quickly and easily?

Apple is, well, Apple, so it’s tempting to think that its example is too well-financed and sophisticated to be applied to a smaller business. That assumption would be a mistake.

Customer experience expert Shaun Smith argues that any size business in any sector can make customers feel more excited, engaged, and valued. “In any marketplace, you’ve got the big players,” he says. “The opportunity now is to change the rules in your favour. It’s not just about being big anymore, it’s about being innovative – in terms of the experience.”

Mr Smith, who presented at an Association of Language Travel Organisations (ALTO) conference late last year, argues that the most competitive brands – large or small – are those that consistently deliver a meaningful experience for customers. He advises schools to first articulate a clear purpose for their brand and then create an experience for prospective and current students that aligns with that purpose.

As the above illustration suggests, slapping a flashy slogan on marketing materials is far from enough. Impressing prospective students involves consistently delivering a valuable experience and investing in areas that allow your school to stand out.

If there isn’t much difference between the price, quality, timeframe, or outcomes your school offers and what competitors offer, what else could suggest to prospective students that they are better off with your school? It could be that they receive excellent pre-departure communications, airport greeting and transportation services, orientation and welcome services on arrival, or something else entirely.

Once you decide which touchpoints to prioritise, stick to them. Mr Smith emphasises the importance of “rites and rituals” – distinctive elements of the customer experience that are always celebrated. For schools, these might be things like welcoming dinners, graduation ceremonies, or alumni receptions.

Students who are consistently impressed with a school are not only less likely to drop out, they are more likely to be loyal and profitable customers who will happily tell others about their positive experience. Figuring out a cycle of touchpoints to make students feel special is an increasingly non-optional – and rewarding – element of a school’s brand strategy.
2. THINK OF BRANDS LIKE PEOPLE

As the international education industry expands and matures, one of its distinguishing characteristics is intensified competition from a growing field of schools and agents, from emerging destinations, and from new business models and types of competitors. And that’s why developing a strong brand identity has never been more important for universities and other schools.

Brand identity is the interaction between what a company says its brand is, how customers or stakeholders experience that brand, and what those customers say the brand is. This relationship goes well beyond the realm of logos and brochures. A company working towards its ideal brand identity employs a set of values and ideas—an organisational philosophy or ethos—to inform all marketing and operations.

Branding expert David Aaker has said, “When the brand vision clicks, it will ... resonate with customers, energise and inspire employees and partners, and precipitate a gush of ideas for marketing programmes. When absent or superficial, the brand will drift aimlessly and marketing programmes are likely to be inconsistent and ineffective." Therefore, much is at stake.

One respected model for the construction of a compelling brand identity is Jean-Noël Kapferer’s Brand Identity Prism, which is reflected in the illustration on page 73. Mr Kapferer is a globally recognised branding expert and a professor emeritus at Hautes Etudes Commerciales (HEC) in Paris.

Kapferer’s Brand Identity Prism was presented at the recent Equals International Conference in Lisbon by Janet Galbraith, principal of CES.
FOR INTERNATIONAL students, the decision to apply to a university or college is a big one, arrived at through careful research and discussion with friends, family, and in many cases agents. The application process itself requires the meticulous assembly and transmission of personal information and documents as well as the payment of fees.

Too often, however, applying to an institution can be delayed by such issues as the student (or agent):
• Sending incomplete information or not knowing about an application requirement;
• Being unable to see whether the application has been submitted properly or what its status is;
• Being unable to reach a school representative in a timely manner.

Such problems can negatively influence students’ perceptions and make them more likely to accept offers from other schools. Similarly, frustrating applications processes can taint agents’ impressions of a school and influence the way they talk about it with students.

Algonquin College has recently revolutionised its international student admissions processes to not only make it simpler for students to apply, but also to equip employees with a system that allows them to better respond to and manage applications.

The results
The implementation of the new system – which occurred over months of testing and fine-tuning – represents a significant advance over the manual processes the college used previously and has led to quicker turnaround times for admissions. The system provides:
• A better application experience for students and agents;
• Better control of applications for Algonquin staff;
• A quicker application review process;
• Better business intelligence on applicants, staff responsiveness, trends, etc., allowing bottlenecks to be easily identified and acted upon by employees.

More international students, more reasons to respond optimally to applications
Algonquin College has welcomed ever-greater numbers of international students over the past several years. Staff at the college are committed to providing an excellent experience to all those who choose Algonquin – and using a smart, responsive application system is part of that commitment.
Edinburgh, the newest school in the Centre of English Studies portfolio.

This brand identity model demonstrates that it must be possible to see a well-articulated brand as a person. This viewpoint is reflected by the “constructed source” aspect of the model, including “physique” (the physical characteristics of the brand) and “personality” (the style or tone of the brand). The brand must also reflect a typical customer, as indicated in the “reflection” and “self-image” elements.

Ms Galbraith adds, “Kapferer suggests that a good brand should be seen by consumers as both a real personality and also as representing the typical user of that brand.”

Kapferer also divides his model into internal and external aspects. “Externalisation” elements are those social aspects of a brand that shape its public-facing expression (including the “physique,” “relationship,” and “reflection” elements shown in the model). “Internalisation,” meanwhile, is about the intrinsic elements – “personality,” “culture,” and “self-image” – that underpin the brand. To put these ideas in simpler terms, let’s take a closer look at each, and at some examples of how this model applies to major brands.

Physique is the physical aspect of the brand, including the logo, colour palette, distinctive packaging or setting, and flagship product. Personality is the character of the brand. It reflects in particular how the brand communicates with the world – for example, via a certain tone or style or even through a spokesperson strongly associated with the brand.

Culture reflects the values and ideas on which the brand is based. Culture may be tied to the brand’s country of origin – for example, Coca-Cola’s expression of American values or Mercedes-Benz’s strong connection to German culture – or to other founding ideas.

Relationship is what customers feel when they engage with the brand. This connection goes beyond individual transactions and ties to
WHAT WOULD YOUR BRAND PRISM LOOK LIKE?

We dreamed up a school and constructed a brand prism for it. Now we want to go there!

- Environmental sciences
- Exposed
- Rustic but modern
- Passionate
- Energetic
- Committed
- Friendly
- Environmentalism
- Multidisciplinary
- Science-based
- Problem-solving
- Making the world a better place
- Fighting climate change
- Youthful
- Adventurers
- Intelligent
- Progressive
- World-changing
- Compassionate

SAGE HILL UNIVERSITY

We can do it!
ideas of family relationships, community, and service. Coca-Cola, for example, emphasises equality, friendliness, and sharing.

Reflection refers to the stereotypical user of the brand – the core market a company is trying to reach and influence.

Self-image is the mirror that your target customers hold up to themselves – that is, it reflects their ideal self back to them. Nike customers, for example, want to see themselves as athletic and determined, whether or not they currently maintain an active lifestyle.

With these examples in mind, can you imagine how you could begin to apply the Kapferer model to your company or institution? Thoughtfully applied, your own brand prism could carry through to day-to-day operations and influence how competitors, stakeholders, and customers alike experience your school or agency brand.

Once developed, the prism can be adjusted as conditions change and can be the foundation of an evolving, dynamic competitive position.

3. **ADD FUEL TO MARKETING FIREPOWER**

Marketing and technology are on the minds of everyone in higher education but, oddly, they’re not always well integrated.

For example, say a university develops an amazing website and commits to posting regularly on social media platforms, but then it allows those efforts to just ... exist, like fires that aren’t regularly tended. In one sense, something is being accomplished: the school is online and in the places students like to hang out. But the question arises: are these efforts aligned with the school’s priority goals?

Let’s imagine some of those goals:
• Increasing the prospect pool;
• Driving a higher inquiry to application conversion rate;
• Encouraging students to post and share compelling testimonials.

Now let’s go back to the question of how the website and social media presence are helping the school to achieve those goals. If the answer is, “I think they are, but maybe not enough,” then you might be interested in growth hacking.

Growth hacking is about (1) picking a goal – typically related to driving growth, use, or engagement, (2) establishing a measurement metric for that goal, and (3) setting online strategies accordingly. It’s an approach increasingly used by start-ups to grow as rapidly as possible, without prohibitive costs.

One company that achieved success through growth hacking is Hotmail. Back in 1996, the founder of the world’s first free email service faced the challenge of building a user base. Traditional marketing methods – billboards, radio ads, and other forms of paid advertising – were a poor fit for a service that was, after all, free.

Hotmail’s solution? A small message at the bottom of every email sent on the system: “P.S.: I love you. Get your free email at Hotmail,” with a link, of course, to a page where new users could sign up. That was it. The rest, as they say, is history. Ten million users and a year or so later, Hotmail was sold to Microsoft for US$400 million.

You don’t have to be a technical genius to apply growth hacking principles to your marketing. What’s necessary is to keep in mind how the web works and how people use it.

Here’s a higher education example. A 2015 Hobsons survey found that most international students, once admitted to schools, want to hear from their school weekly up until the start of their programme. Is your institution doing this? If not, an opportunity exists to reduce attrition in those latter stages in the admissions pipeline using automated emails. Growth hack, ahoy!
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OXFORD INTERNATIONAL EDUCATION GROUP

HOW DO YOU GROW AN educational brand? More specifically, how do you expand in scope, revenues, geographical footprint, and audience – while remaining true to the core values that made your school brand successful in the first place?

For Oxford International Education Group, now celebrating its 25th anniversary, this has been a key question over the past two decades as it has grown from a small outbound study tour operation for British students to an independent education company whose scope now includes language education, secondary and higher education, and student tours.

Oxford International founders David Brown and Robert Darell believe the answer is two-fold:

1. Don’t forget why you became successful in the first place (Oxford International is known for its approachable and relationship-driven ethos and commitment to providing top-quality experiences for students);
2. Let market trends inform where opportunities for growth exist.

Relationships matter
Oxford International has always prioritised warm and close relationships with agents and industry partners, and this is particularly relevant in the context of a global language industry in flux, with new technologies and competitors emerging all the time. Working with strong partners remains a powerful competitive strategy for the company, as illustrated by its continued growth and expansion.

Strategic growth
The company’s extended list of offerings – including pathway programmes, educational tours, language courses, A-level courses, and diverse summer programmes – mirrors the new face of international education. Colleges and universities are enrolling more international students than at any other time in history, and from a diverse set of countries. For students coming from non-Anglophone countries in particular, preparatory programmes are an important step towards completing undergraduate and post-graduate degrees. Oxford International has thus been adding more pathway courses to its portfolio, with the UK, US, and Canada being key focus areas.

Oxford International now has five on-campus colleges at UK university partners and is looking to add more in Europe and North America over the next 18 months.

At the same time, the company continues to offer the more recreationally based programmes it has always excelled in: language courses in sought-after destinations and tailor-made study tours.

It’s all about people
As much as Oxford International has grown, the team is determined to retain a brand personality that does not feel overly corporate. David Brown notes, “There is room for a range of providers in our competitive arena. The largest players are very good at what they do, but for our part, we are comfortable being big, but not too big. Big enough to offer a comprehensive range of programmes and locations, and small enough to ensure we keep excelling at what we do well.”

For more information, please email David Brown at DBrown@oxfordinternational.com.
# COMING UP IN 2017

## JANUARY
**ST ALPHE SPAIN**  
13–15 January  
Málaga, Spain

**ENGLISH USA PROFESSIONAL DEVELOPMENT CONFERENCE**  
19–20 January  
Monterey, CA, USA

**BETT SHOW**  
25–28 January  
London, UK

## FEBRUARY
**ENGLISH UK MARKETING CONFERENCE**  
3 February  
London, UK

**ICFE DUBAI WORKSHOP**  
6–8 February  
Dubai, UAE

**ICFE TURKEY AGENT FOCUS**  
10–11 February  
Istanbul, Turkey

**ST ALPHE ASIA**  
15–17 February  
Bangkok, Thailand

**ST ALPHE TAIWAN**  
19–21 February  
Taipei, Taiwan

**ASSOCIATION OF INTERNATIONAL EDUCATION ADMINISTRATORS (AIEA) ANNUAL CONFERENCE**  
19–22 February  
Washington, DC, USA

**ICFE JAPAN-KOREA AGENT ROADSHOW**  
21–23 February  
Tokyo, Japan, and Seoul, South Korea

**LANGUAGES CANADA ANNUAL CONFERENCE**  
26 February - 1 March  
Quebec City, Canada

## MARCH
**ICFE MEXICO-COLombIA AGENT ROADSHOW**  
28 February - 3 March  
Mexico City, Mexico, and Bogotá, Colombia

## APRIL
**ICFE AUSTRALIA NEW ZEALAND AGENT (ANZA) WORKSHOP**  
5–7 April  
Cairns, Australia

**ICFE NORTH AMERICA WORKSHOP—VANCOUVER**  
23–25 April  
Vancouver, Canada

**CASE ASIA-PACIFIC ADVANCEMENT CONFERENCE (APAC)**  
24–27 April  
Singapore

**EUROPEAN ASSOCIATION FOR QUALITY LANGUAGE SERVICES (EQUALS) INTERNATIONAL CONFERENCE & ANNUAL GENERAL MEETING**  
27–29 April  
Riga, Latvia

## MAY
**BRITISH COUNCIL’S GOING GLOBAL**  
22–24 May  
London, UK

**ASSOCIATION OF INTERNATIONAL EDUCATORS (NAFSA) ANNUAL CONFERENCE & EXPO**  
28 May–2 June  
Los Angeles, CA, USA

**BRITISH EDUCATIONAL TRAVEL ASSOCIATION (BETA) YOUTH TRAVEL WORKSHOP**  
2017 dates TBA  
London, UK

**ENGLISH UK ANNUAL CONFERENCE & GENERAL MEETING**  
2017 dates TBA  
London, UK

## JUNE
**ICFE SOUTHEAST ASIA WORKSHOP**  
14–16 June  
Ho Chi Minh City, Vietnam

**BRITISH COLUMBIA COUNCIL FOR INTERNATIONAL EDUCATION (BCCIE) SUMMER SEMINAR**  
18–21 June  
Kelowna, Canada

**ICFE LATIN AMERICA WORKSHOP**  
21–23 September  
São Paulo, Brazil

**WORLD YOUTH AND STUDENT TRAVEL CONFERENCE (WYSTC)**  
2017 dates & location TBA

## JULY
**INTERNATIONAL ASSOCIATION FOR COLLEGE ADMISSION COUNSELING (IACAC) ANNUAL CONFERENCE**  
10–14 July  
Cleveland, OH, USA

## AUGUST
**INTERNATIONAL EDUCATION ASSOCIATION OF SOUTH AFRICA (IEASA) ANNUAL CONFERENCE**  
2017 dates & location TBA

**AUSTRALIAN COUNCIL FOR PRIVATE EDUCATION TRAINING (ACPET) NATIONAL CONFERENCE AND ASIA PACIFIC INTERNATIONAL EDUCATION FORUM (APIEF)**  
2017 dates & location TBA

## SEPTEMBER
**ENGLISH UK’S STUDY WORLD**  
4–6 September  
London, UK

**ICFE HIGHER EDUCATION WORKSHOP**  
9–11 September  
Seville, Spain

**ICFE HIGHER EDUCATION PARTNERSHIP FORUM**  
12 September  
Seville, Spain

**EUROPEAN ASSOCIATION FOR INTERNATIONAL EDUCATION (EAFIE) ANNUAL CONFERENCE**  
12–15 September  
Seville, Spain

**NATIONAL ASSOCIATION FOR COLLEGE ADMISSION COUNSELING (NACAC) ANNUAL CONFERENCE**  
14–16 September  
Boston, USA

## OCTOBER
**ICFE BEIJING WORKSHOP**  
11–13 October  
Beijing, China

**ICFE BERLIN WORKSHOP**  
29–31 October  
Berlin, Germany

**ENGLISH USA INTENSIVE ENGLISH PROGRAMS (IEP) STAKEHOLDERS CONFERENCE**  
2017 dates & location TBA

## NOVEMBER
**ASSOCIATION OF COLLEGES (AOC) ANNUAL CONFERENCE & EXHIBITION**  
2017 dates & location TBA

**CANADIAN BUREAU FOR INTERNATIONAL EDUCATION (CBIE) BCCIE) ANNUAL CONFERENCE**  
2017 dates & location TBA

**UK NATIONAL RECOGNITION INFORMATION CENTRE (NARIC) ANNUAL CONFERENCE**  
2017 dates TBA  
London, UK

## DECEMBER
**ICFE NORTH AMERICA WORKSHOP—MIAMI**  
11–13 December  
Miami, FL, USA

**AMERICAN INTERNATIONAL RECRUITMENT COUNCIL (AIRC) ANNUAL CONFERENCE**  
6–9 December  
Miami, FL, USA

**SERVICES FOR INTERNATIONAL EDUCATION MARKETING (SIEM) CONFERENCE**  
2017 dates & location TBA
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WHAT MOST INFLUENCES STUDENTS’ DECISIONS ABOUT WHERE TO STUDY ABROAD? i-graduate’s 2016 International Student Barometer surveyed thousands of students to find out.*

**LOOKING AT THE FINDINGS:** Perhaps the most striking finding is how important institutional websites are to students’ decision-making. “Institutional Websites” placed first in Canada and the UK and second in Australia, Germany, and the US.

Earlier this year, Chegg/mStoner research, summed up in a whitepaper entitled “Mythbusting Admissions,” found that email and school websites remain heavily influential in students’ decisions about where to apply and enrol. The whitepaper’s authors note that too little investment in these areas can cause schools to lose out on prospective students who might otherwise seriously consider enrolling.

And in ICEF Monitor, we regularly highlight how crucial it is for schools to optimise their websites. We wrote that a website works if it:

- Conveys an attractive brand image;
- Spotlights the school’s or agency’s strengths;
- Quickly answers students’ questions.

How is your website doing on these measures?

**TURNING TO OTHER FINDINGS:** It is likely that some response categories overlap – e.g., students may be chatting with “Friends” or “Current Students” on social media or other online channels. So although “Social Media” did not appear in the Top Three rankings, students could be conflating it with “Friends”/“Current Students” in their thinking.

**ALSO OF NOTE:** “Social Media” elicited more responses in 2016 than in previous years of the International Student Barometer, suggesting that it is playing a growing role in students’ decision-making.

Established in 2005, the International Student Barometer is the largest international student benchmarking study in the world. It has now been implemented by 1,400 institutions in 33 countries and has to date gathered responses from more than 2.5 million students. For more information, please see http://www.i-graduate.org.

* Top three responses from international students enrolled with institutions in five leading destinations.
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