

# Working With Agencies



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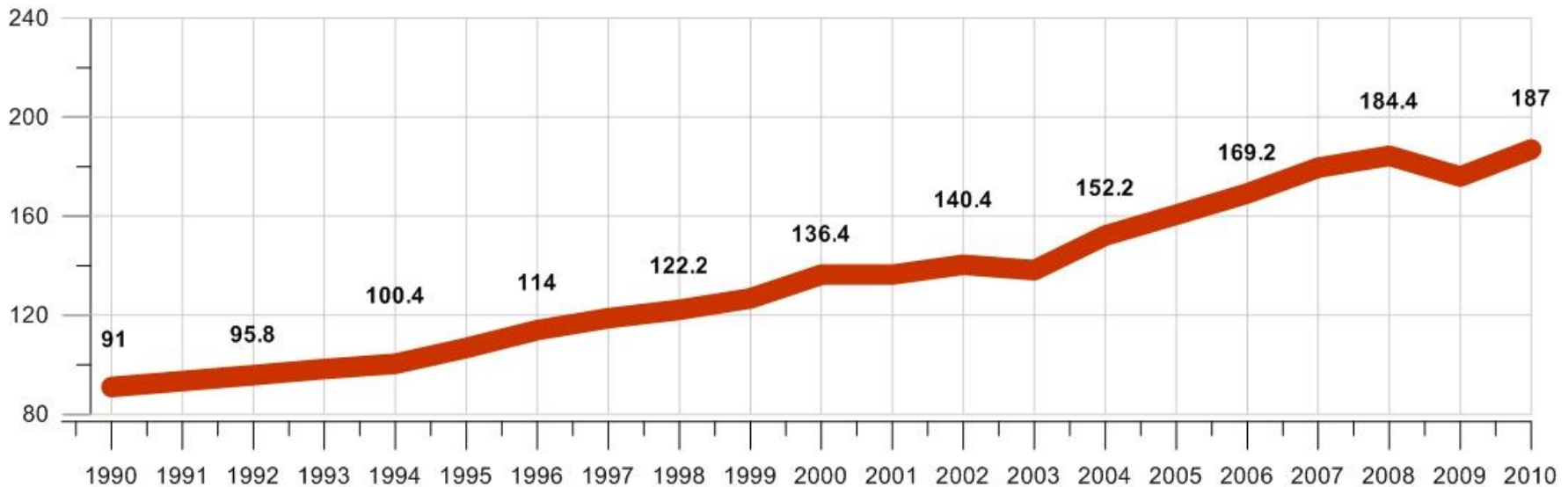
## Educational Marketing

Samuel Vetrak, StudentMarketing Ltd.

# Global Youth Travel Market

## Market Size

Number of arrivals in millions



Source: UNWTO Global Tourism Barometer 2010

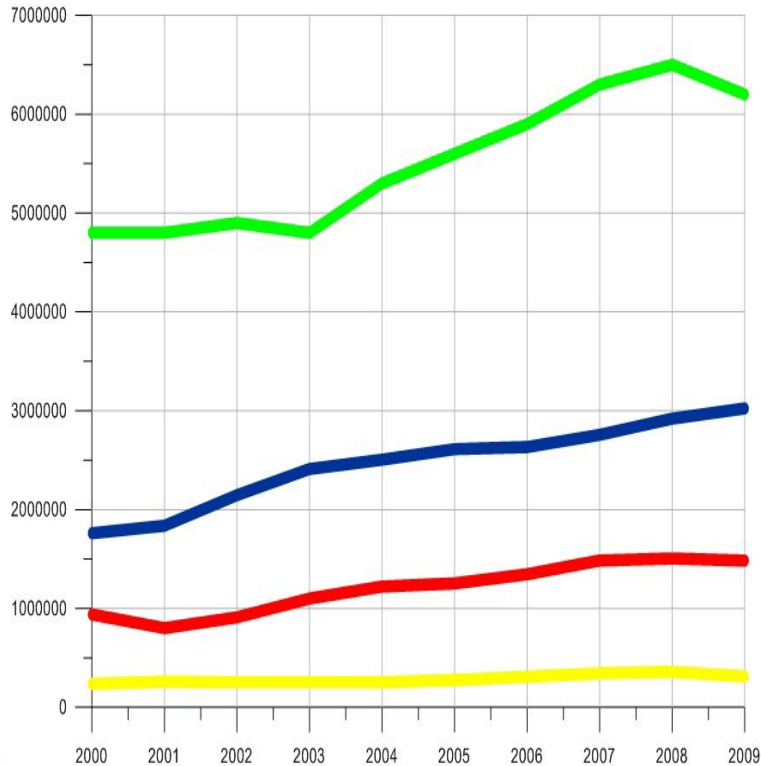
Youth & Student Travel represents cca 20% of global world Tourism and Travel.

# Global Youth Travel Market

## Overall Student Market



Number of students



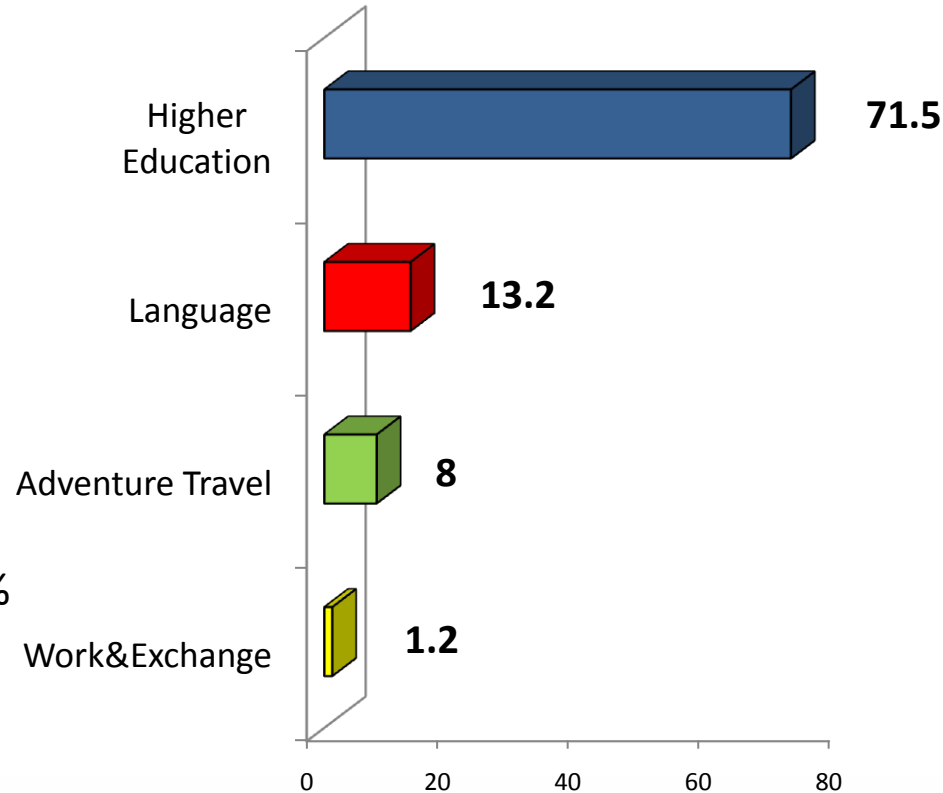
29,2%

71,7%

58,1%

32,6%

Revenues in bn USD



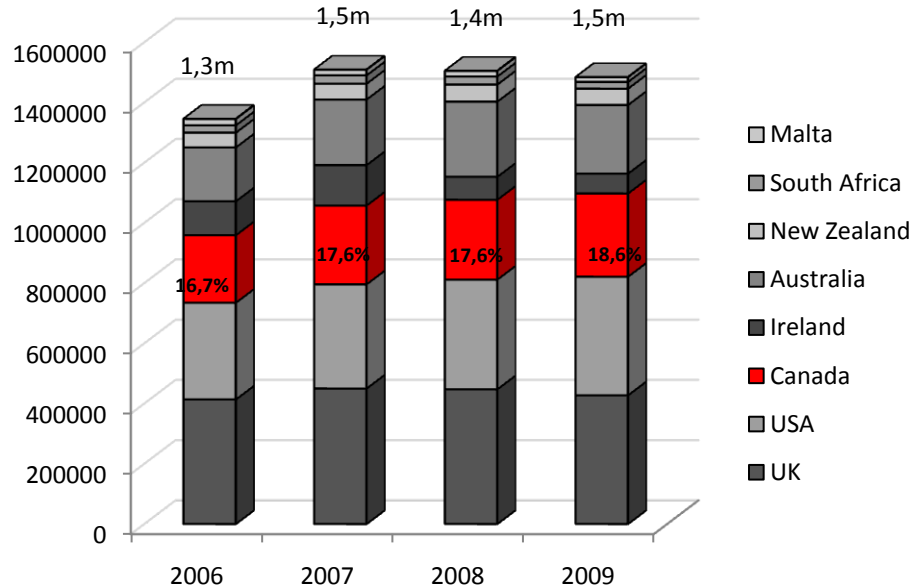
Sources: Xola Consulting, LTM, UNESCO, OECD, USDS

# Educational Market

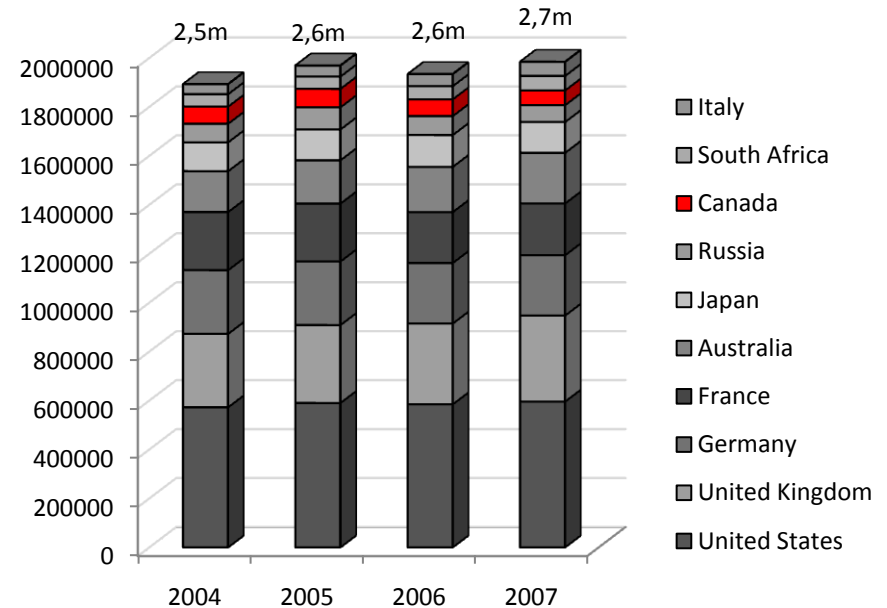
## Trends in educational sectors



### Language Travel



### Higher Education

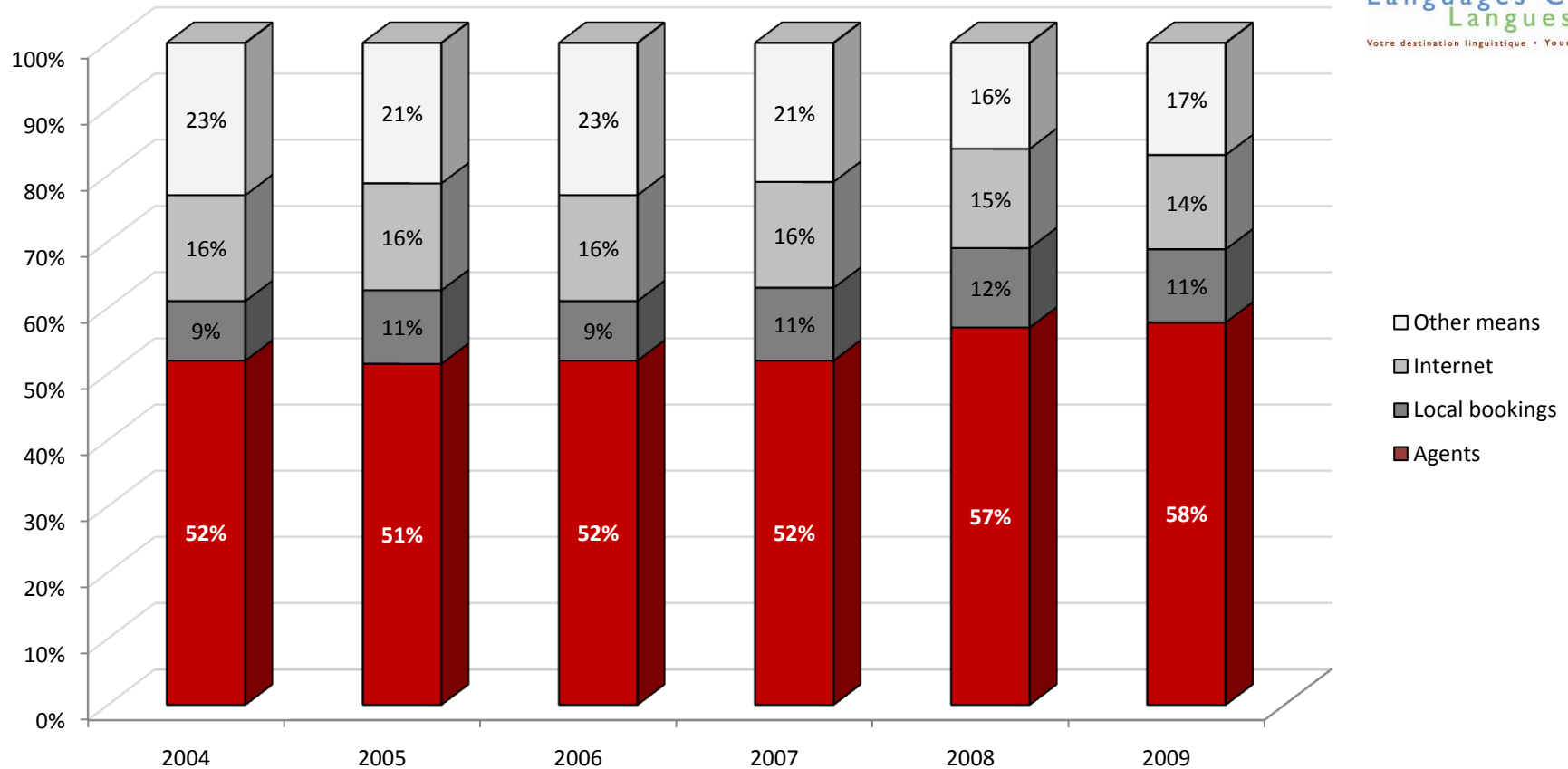


In 2008, around 3 million students were enrolled in tertiary educational institutions outside of their country of origin.

In 2009, around 1,5 million students participated at English language course abroad.

Sources: LTM 2010, UNESCO, IIE Network, OECD Statistics

# Source of Enrollments in LT



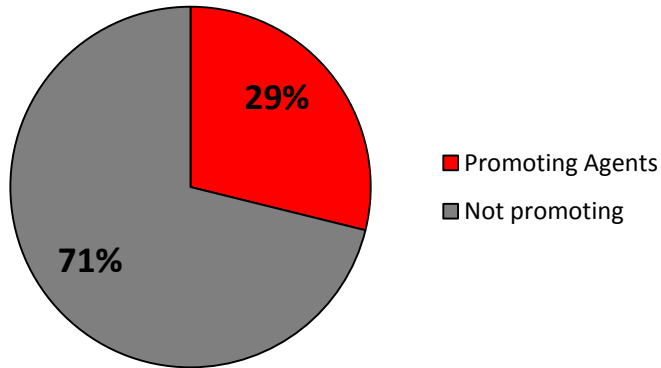
Source: Language travel magazine, 2000 - 2010

Student recruitment agents are strong channel to access international students  
– up to 89% of students in some markets use agents to book their courses.

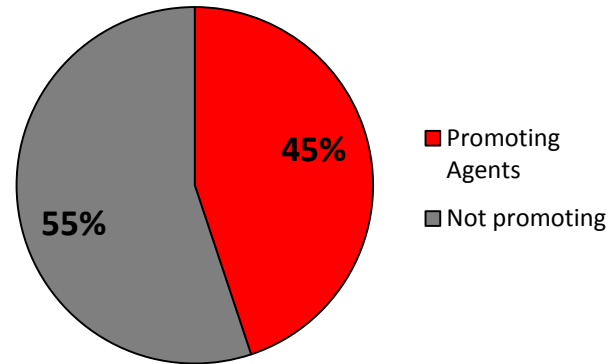
# Source of enrollments in HiEd



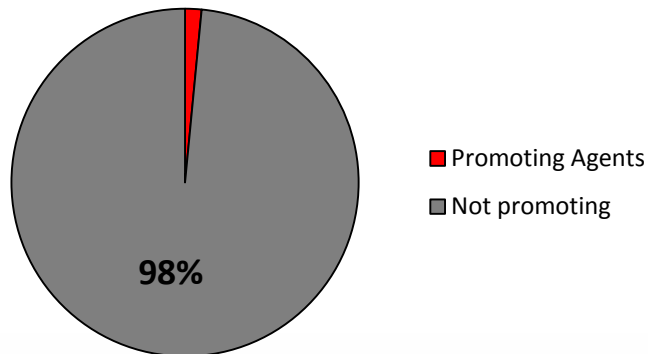
Australia



UK



USA 2%



Research done on pool of:

- 200 HiEd Institutions from Australia
- 303 HiEd Institutions from UK
- 6023 HiEd Institutions from USA

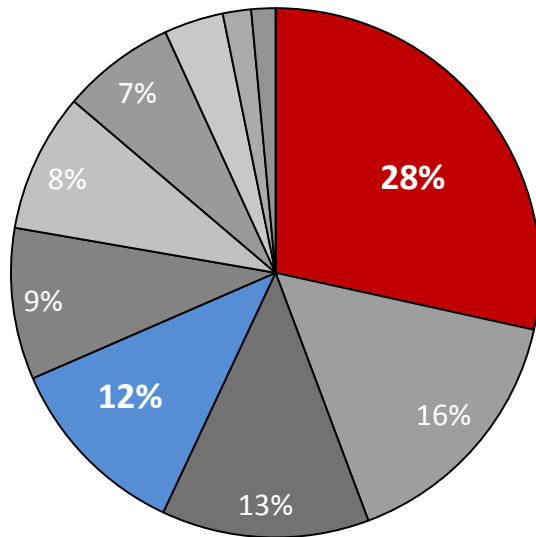
Source: StudentMarketing 2011

# Educational Agencies

## Number of agencies by sectors

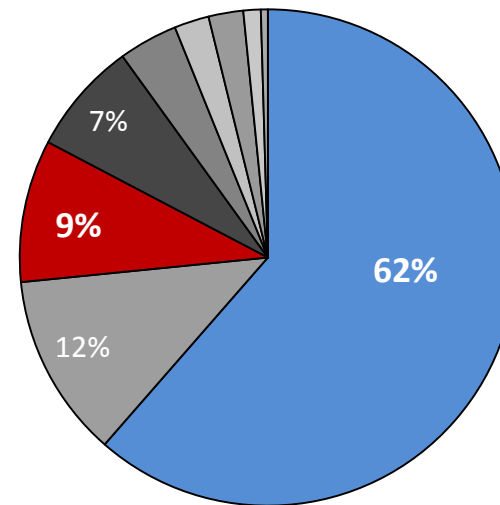


Europe



- Language
- Travel
- Work
- University
- High School
- AuPair
- Internships
- Camp
- Volunteer
- Vocational

China +India

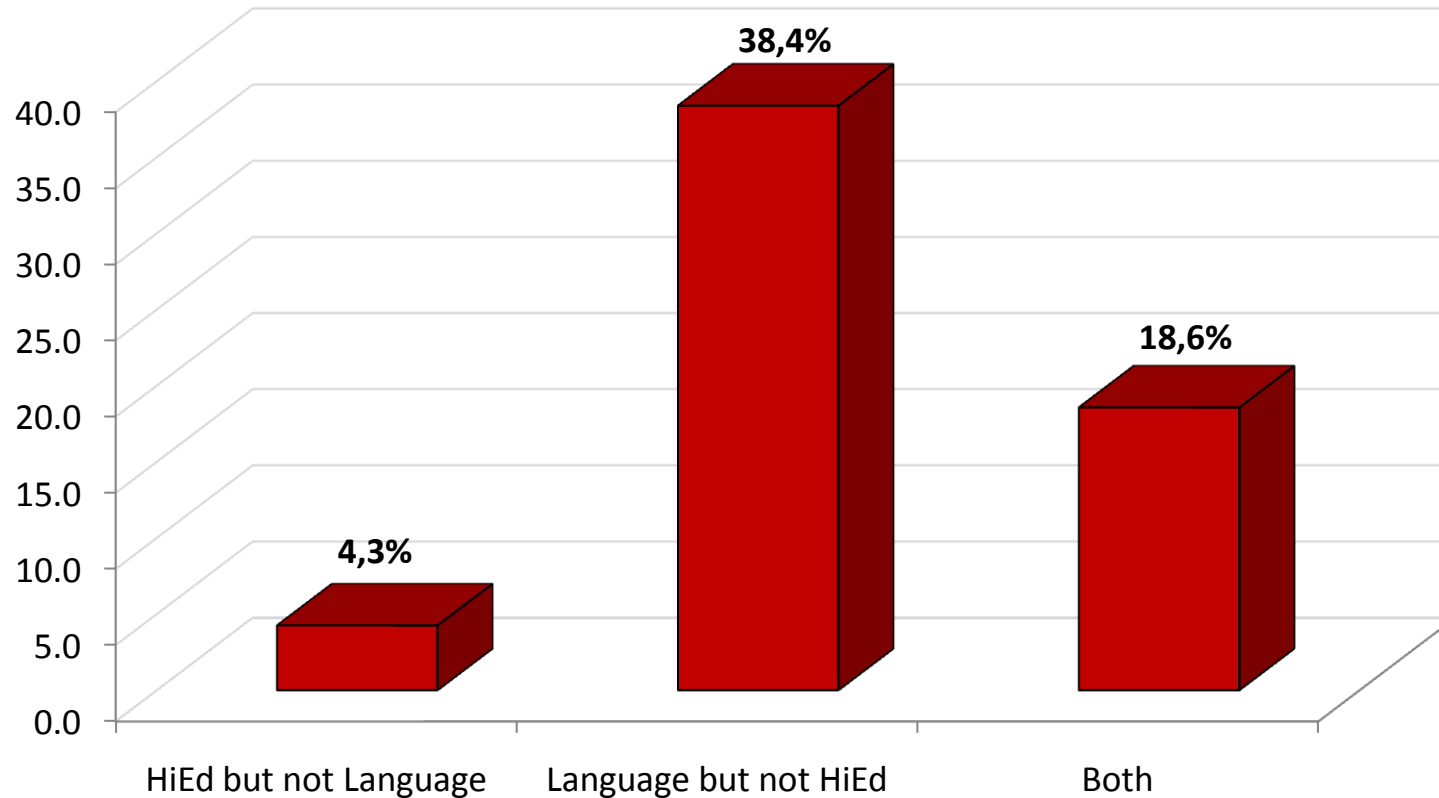


- University
- Work
- Language
- High School
- Vocational
- Travel
- Internships
- Volunteer
- Au Pair

Source: StudentMarketing 2011

# Educational Agencies

## Sector Relations in Educational Travel



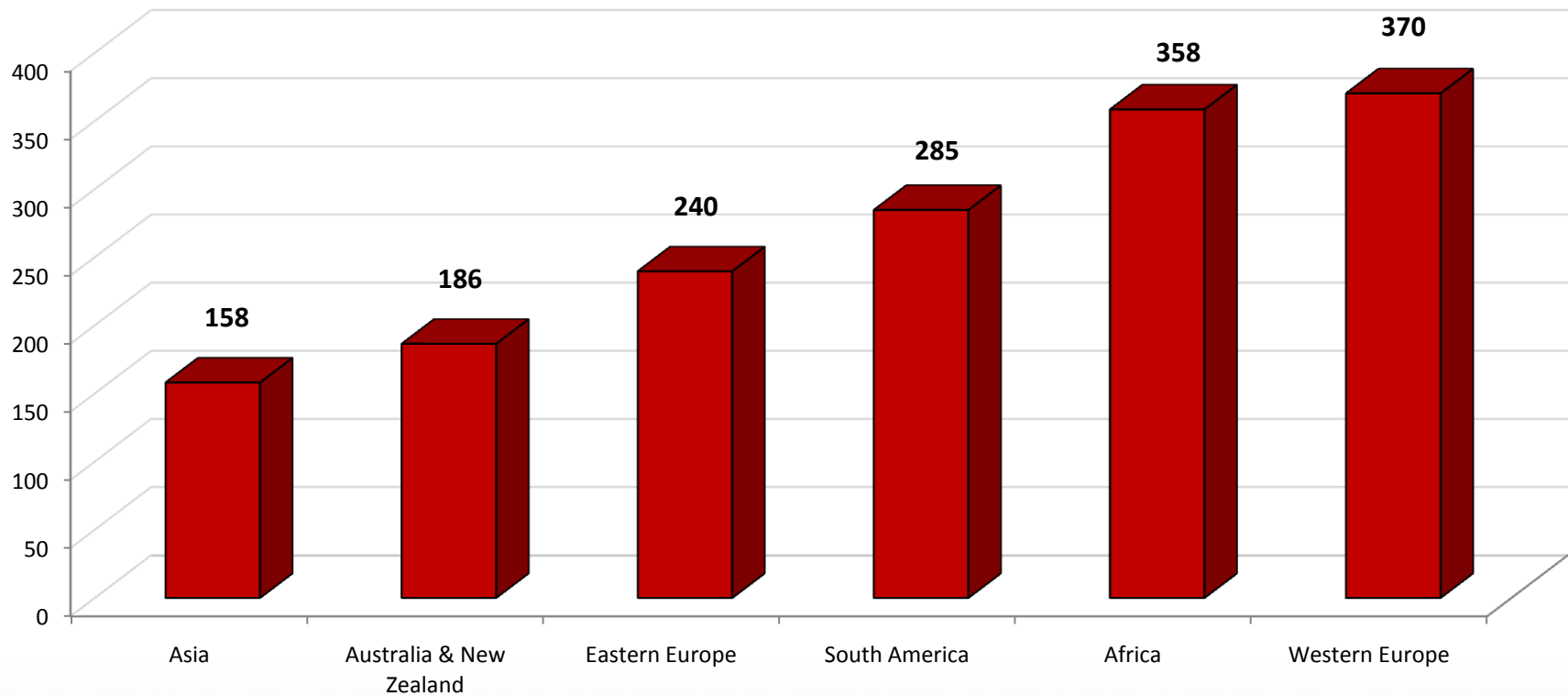
Source: StudentMarketing 2011

# Educational Agencies

## Sending Numbers



Average number of students sent by agency (extrapolated)

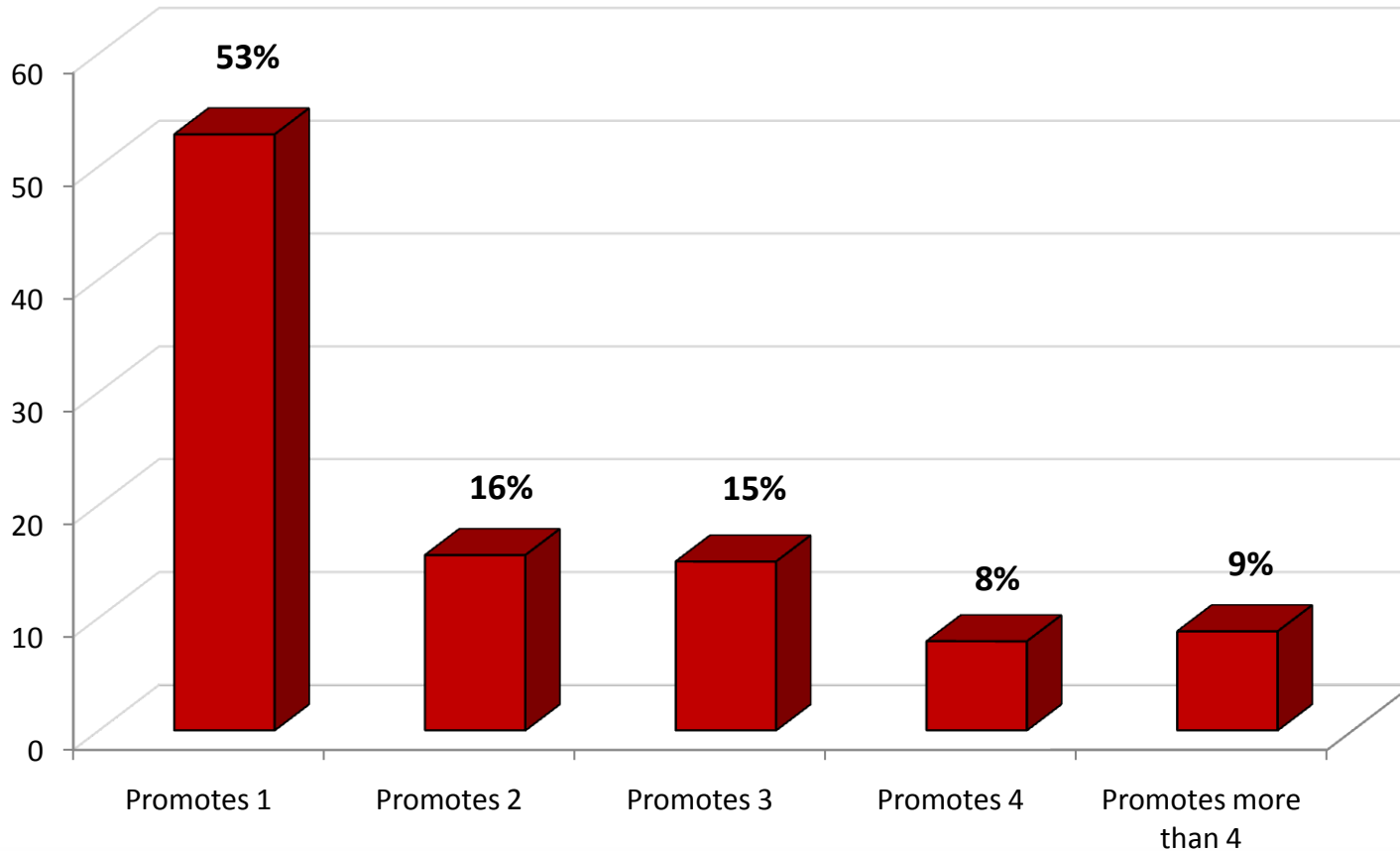


Source: StudentMarketing 2011

# Educational Agencies



Portfolio & Focus of Agencies in Europe

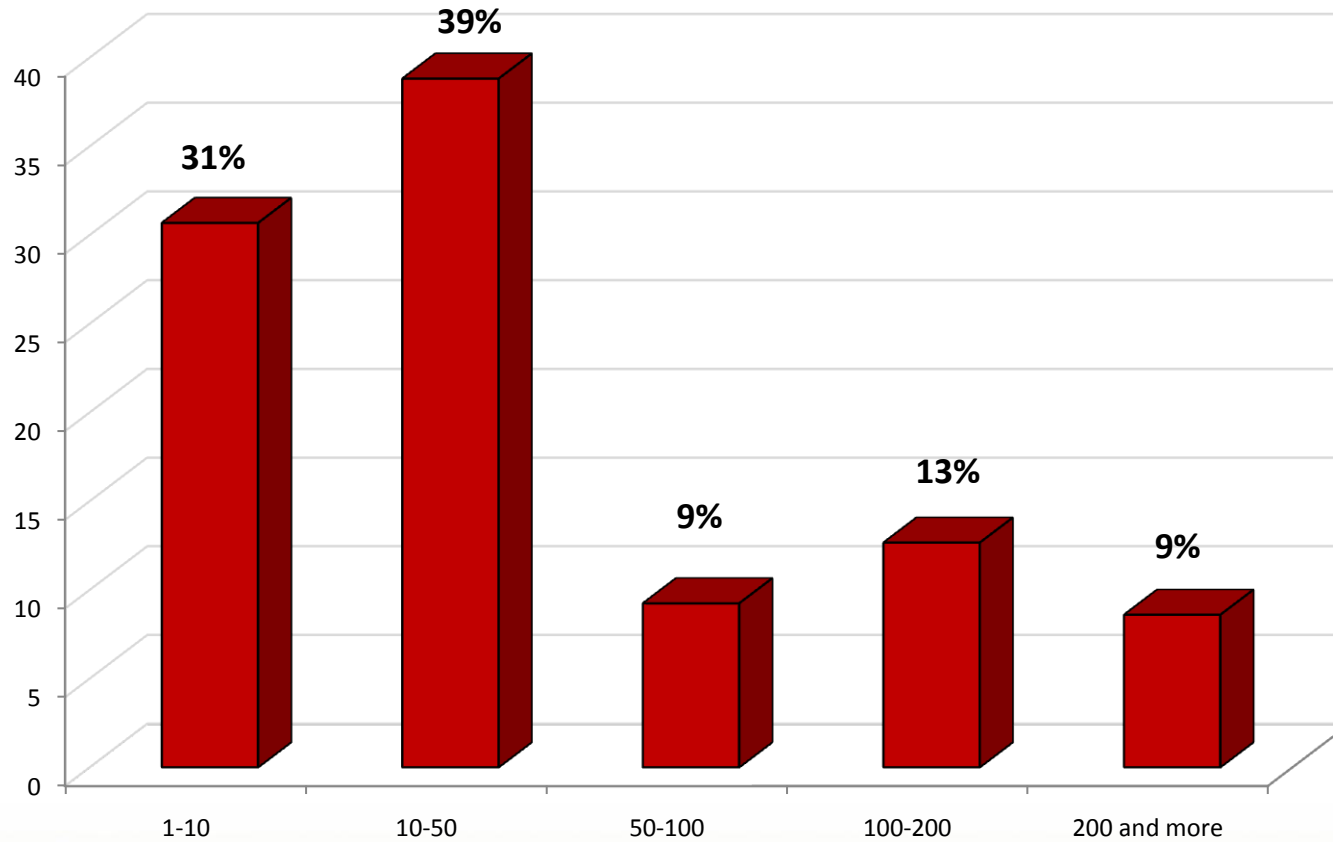


Source: StudentMarketing 2011

# Educational Agencies



Number of students handled by one employee (extrapolated)

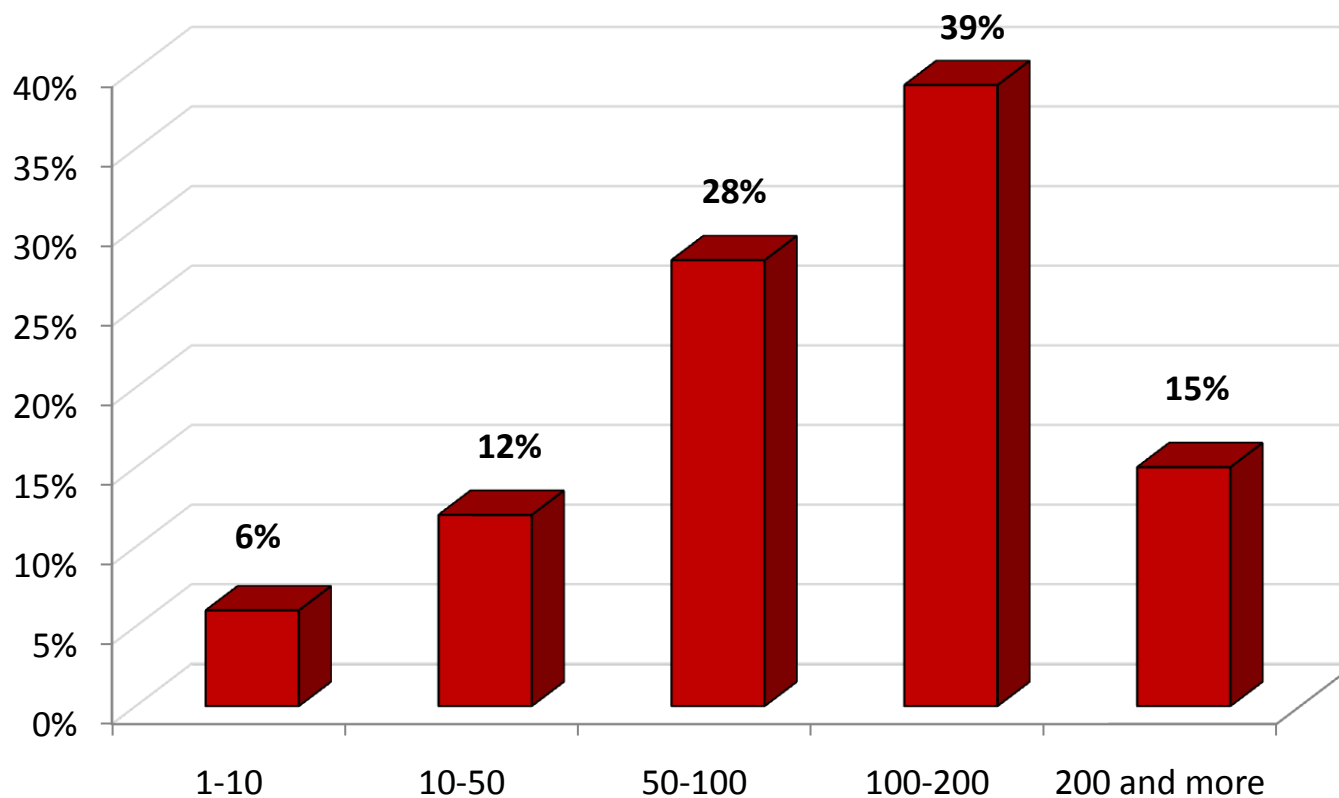


Source: StudentMarketing 2011

# Educational Agencies



Number of students administered by one office (extrapolated)



Source: StudentMarketing 2011

# Educational Agencies



## Role/functions of educational agencies

- Promote & Recruit
- Advise & Administer
- Evaluation, agencies or educational institutions?

# Educational Agencies



Most agencies are focused on few programmes.

Many agencies/counselors administer small number of customers.

Quality agencies have reasons to care more than just about commission.

What comes first, student or university?

# Educational Agencies

## Quality/Suitability



Only cca 30% of educational agencies can be considered **suitable for partnership**:

- not all are quality agencies
- not all are suitable for particular educator

**How to identify** quality/suitable educational agencies (some criteria)?

- Age/experience
- Portfolio
- Offices/counsellors
- Price levels
- Workshop attendance
- Trainings/FAM trips
- Credentials/association membership
- Credentials/governmental organisations

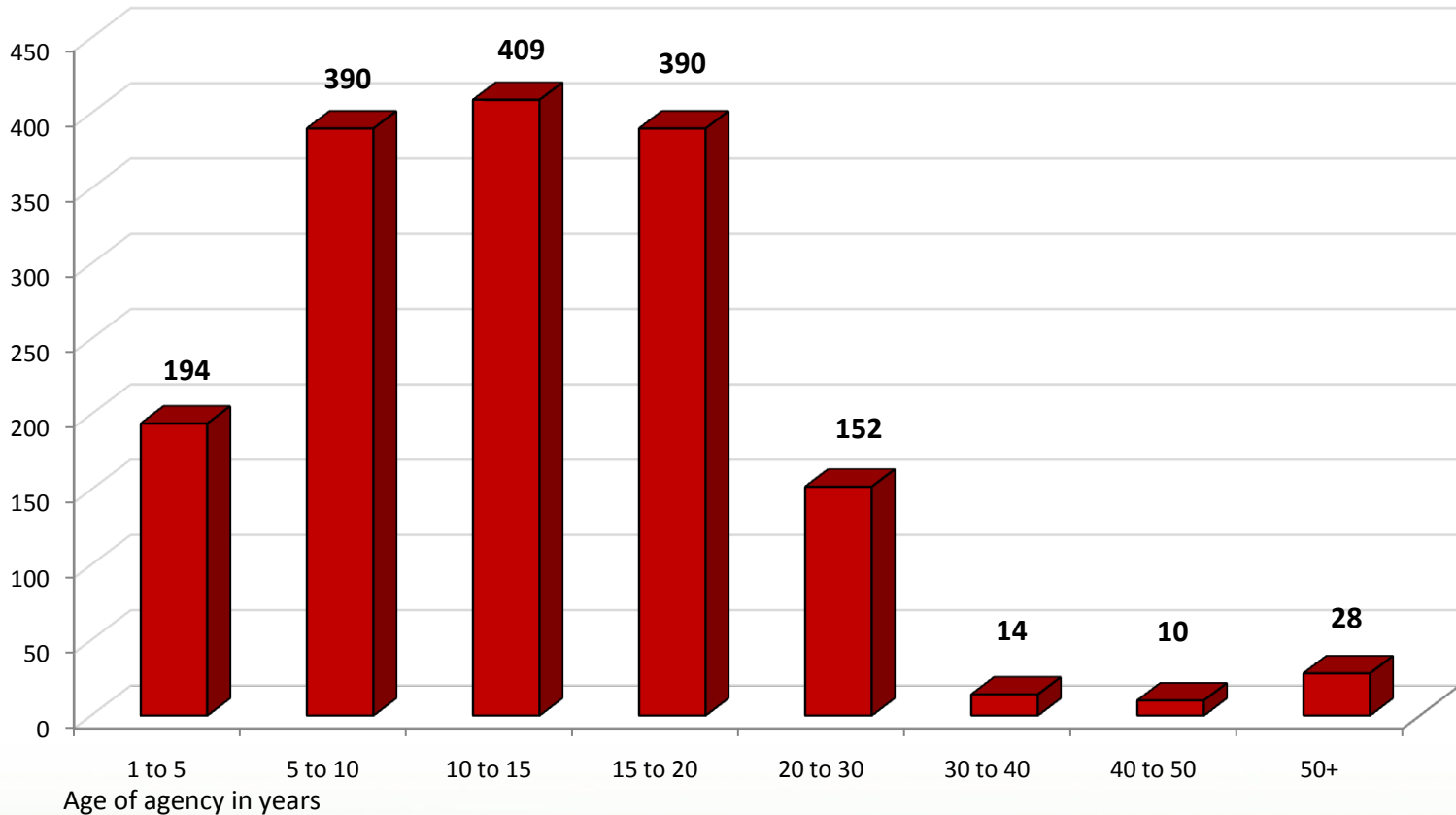
Educators can benefit from working with agencies, if working with reliable and suitable ones.

# Educational Agencies – CEE



## Profile of agents by **experience/age**

No. Of agencies

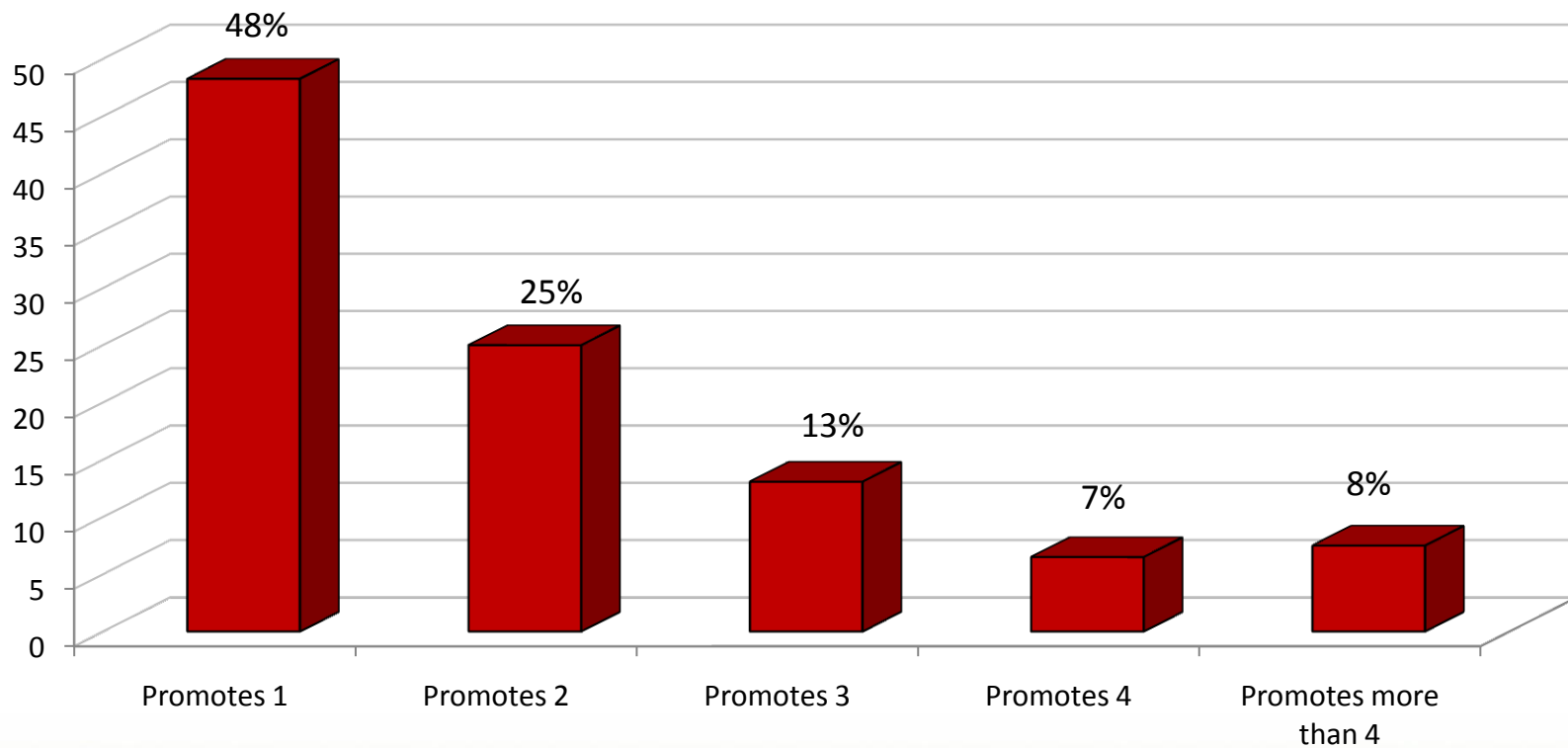


Source: StudentMarketing 2011

# Educational Agencies – CEE

## Profile of agents by portfolio

Overview of agencies by number of sectors they promote

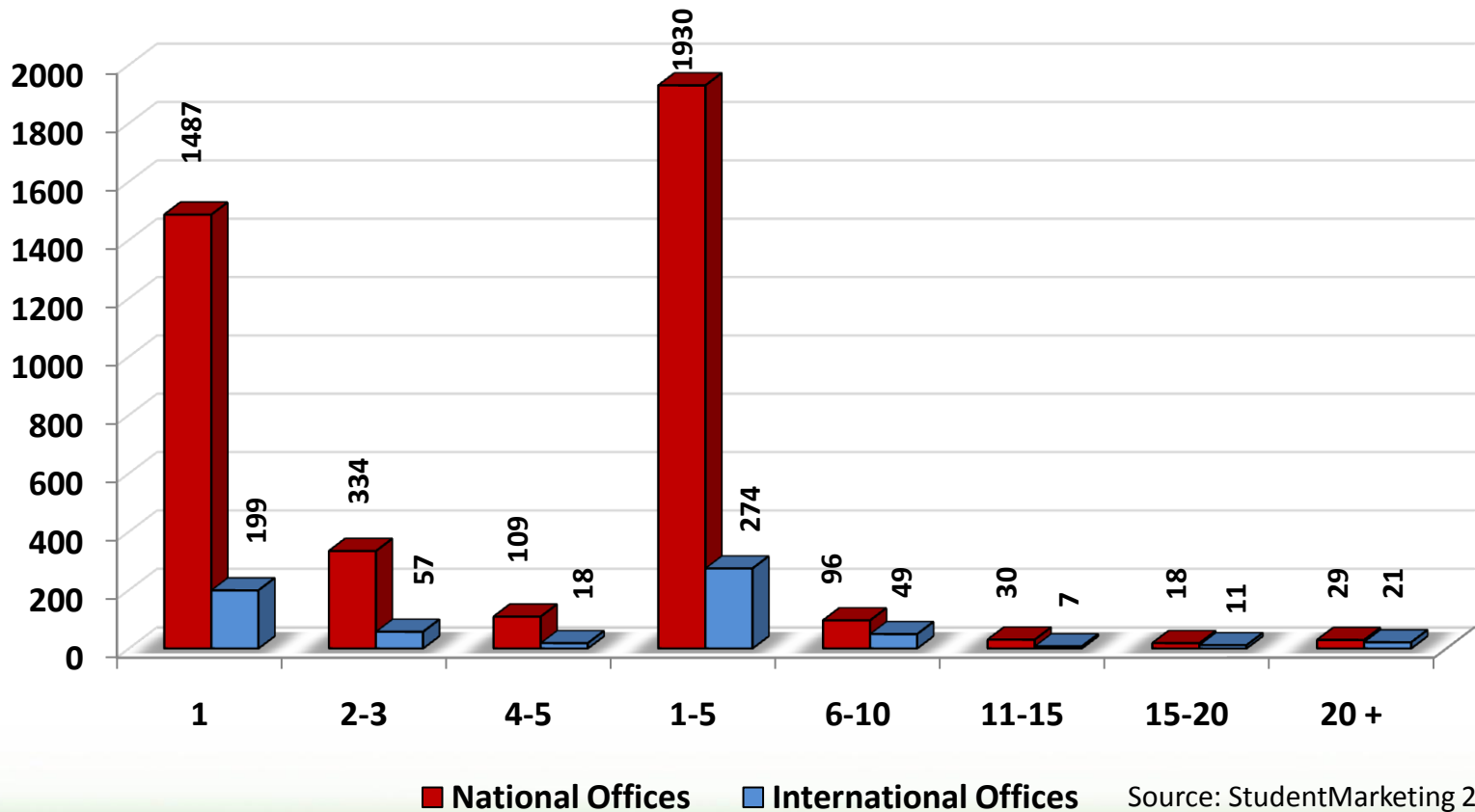


Source: StudentMarketing 2011

# Educational Agencies – CEE



## Profile of agents by number of offices

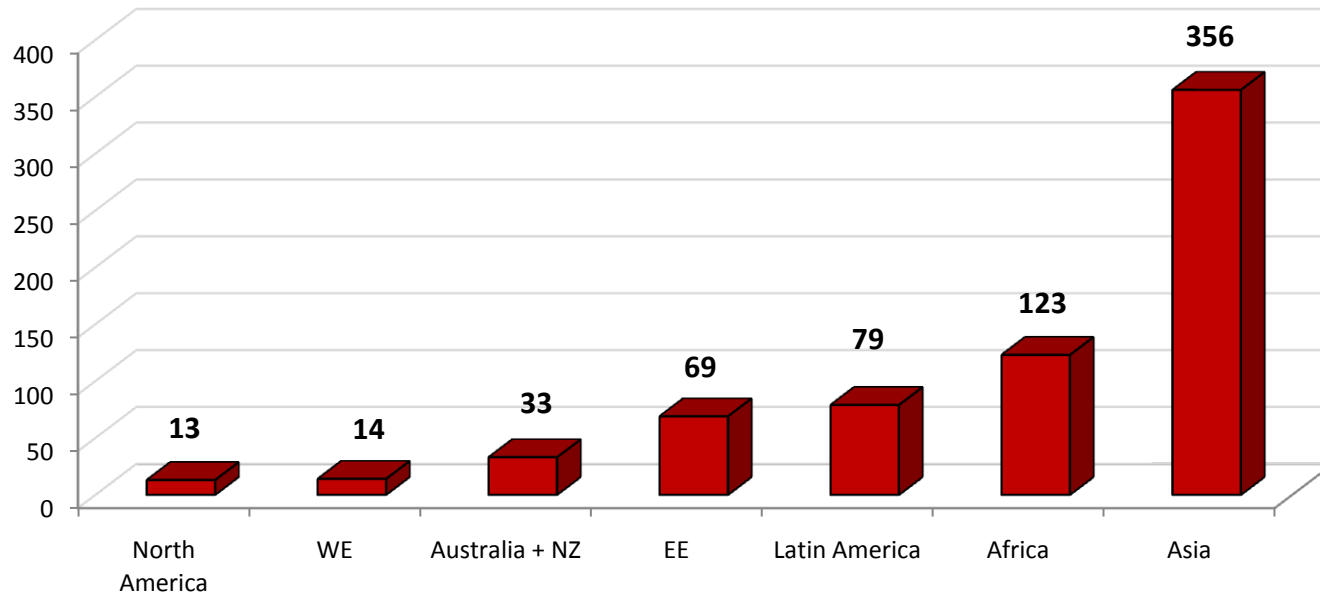


# Educational Agencies – CEE

## Market Demand – purchasing/buying power



ESL Index (similar to BigMac Index) how many days should one work at home to purchase 4wGE course in Toronto.



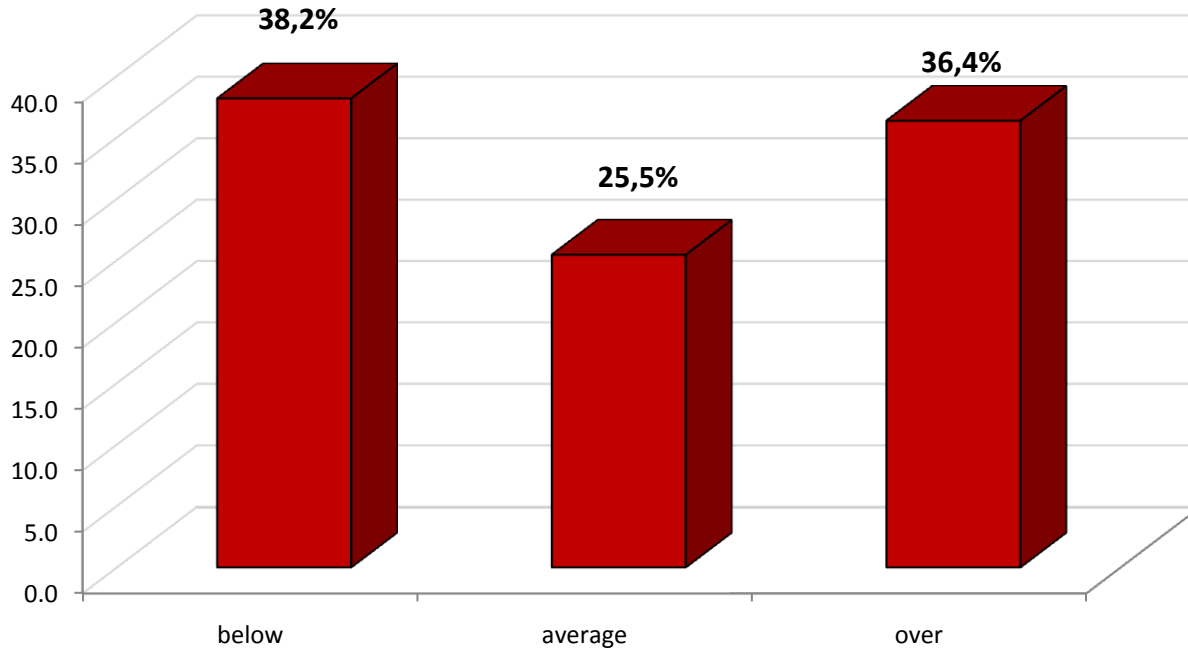
The larger the column is, the weaker the buying power is (more workdays necessary for consumer to be able to purchase).

Source: StudentMarketing 2011

# Educational Agencies – CEE



## Profile of agents by price levels



There are various financial methods inbetween educational institution and educational agency available:

- Gross prices/Commission
- Gross prices/Agency Fee
- Net Prices, -other

25% of agencies promote they products for an average price

Source: StudentMarketing 2011

# Educational Agencies – CEE

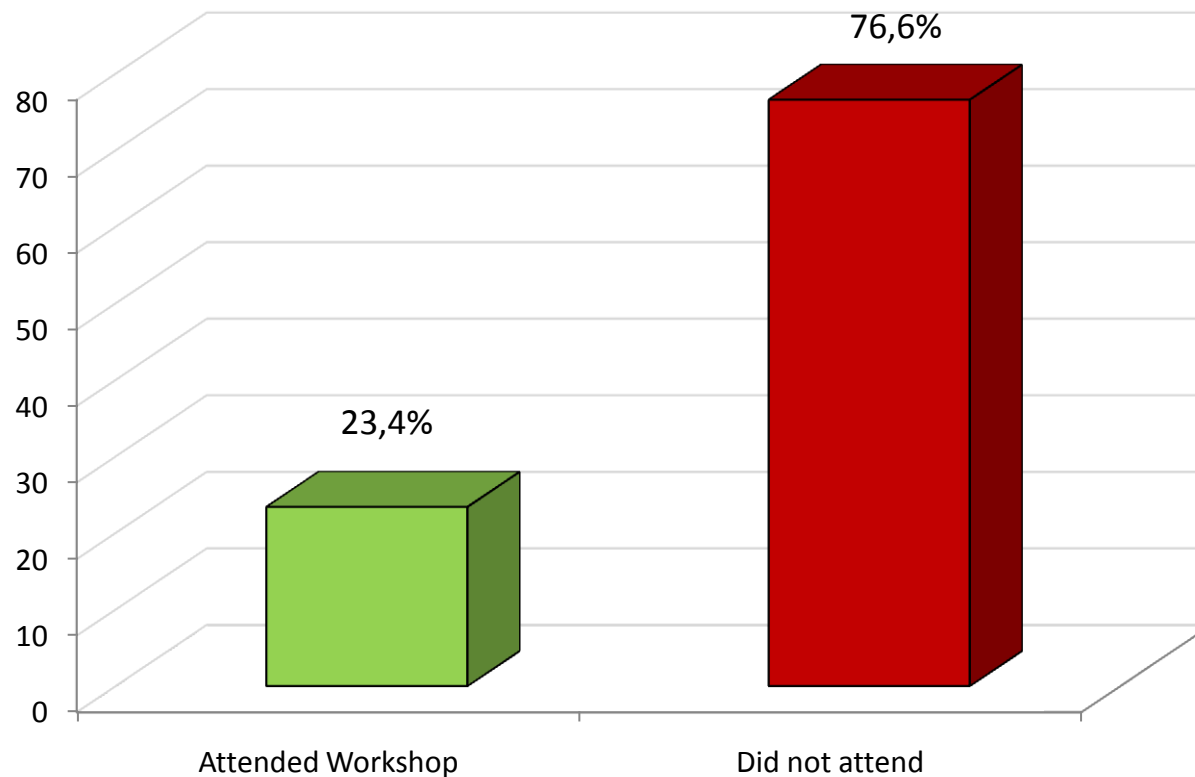


**Accurate information** (about educational institution) to and through agent:

- FAM Trip
- Online training/Webinar
- Workshops/Trade missions
- In-source-market meeting
- Online direct presentation
- Educational Fairs

# Educational Agencies – CEE

## Profile of agents by **workshop attendance**



There are dozens of b2b workshop opportunities in Educational Travel:

- ICEF
- ALPHE
- StudyWorld
- Other

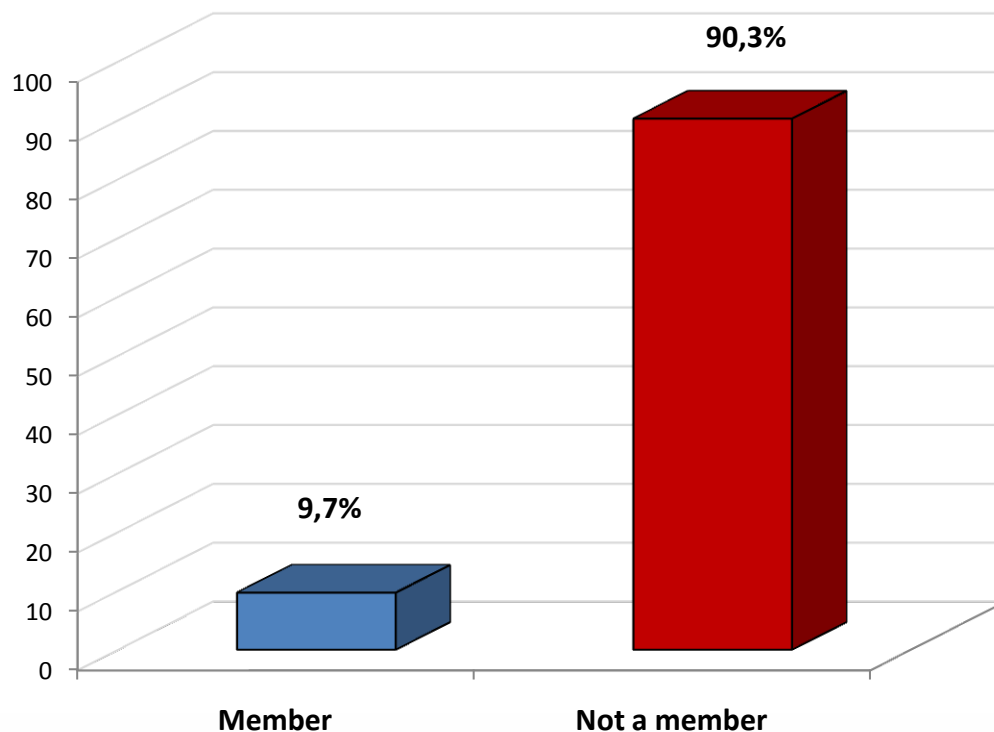
Share of agents who attended workshop in the past 3 years.

Source: StudentMarketing 2011

# Educational Agencies – CEE



## Profile of agents by association membership



There are 110 agent associations that track quality of agencies:

- BELTA
- UNOSEL
- IALCA
- JAOS
- KOSA
- ALICE
- AREA
- ASEPROCE
- TIECA
- TEAG
- UED
- etc.

Source: StudentMarketing 2011

# Educational Agencies – CEE

## TOP100 educational agencies for partnership



BASIC DATA			BASIC DATA			BASIC DATA			FAIR PARTICIPATION		COUNTRIES THEY WORK WITH		
Name	website	Country	Headquarters	Nat Offices	Approx. No. Of en	Established	Sending number	Fair participant	UK	Canada	Ireland		
Student agency czei	www.studentagency.cz	Czech Republic	Brno	13	1000	1993	A+	X	X	X	X		
Study lab	www.studylab.ru	Russia	Moscow	1	16	2006	A+	X	X	X	n/a		
Students international	www.studenter.ru	Russia	Moscow	45	n/a	1993	A+	X	X	X	X		
Bilur educational tra	www.bilur.com	Turkey	Istanbul	1	12	n/a	A+	X	X	X	n/a		
Global visions educa	www.globalvision.com	Turkey	Istanbul	7	40	1996	A	X	X	X	X		
Anglo-world	www.anglo-world.ru	Russia	Moscow	9	n/a	2002	A	X	X	X	X		
Horizon	www.horizonedu.net	Turkey	Istanbul	4	33	2003	A	X	X	X	n/a		
Desk Abroad Educat	www.desk-egtm.com	Turkey	Istanbul	2	12	2005	A	X	X	X	n/a		
Insight-Lingua	www.i-l.ru	Russia	Moscow	2	30	2005	A	X	X	X	X		
Alternatif	www.alternatifca.com	Turkey	Istanbul	5	20	1998	A	X	X	X	n/a		
Old team	www.dadteam.sk	Slovakia	Bratislava	1	6	1995	A	X	X	X	X		
Planet esperanto	www.esperanto.ru	Russia	Moscow	1	20	1992	A	X	X	X	X		
Open world educati	www.open-world.ru	Russia	Moscow	1	11	1995	A	X	X	X	X		
Network yurtlari egt	www.networkegtm.com	Turkey	Istanbul	5	19	1990	A	X	X	X	n/a		
Advis	www.advis.com.tr	Turkey	Istanbul	2	20	1997	A	X	X	X	n/a		
Persona gratis	www.gratis.ru	Russia	Moscow	1	6	2003	A	X	X	X	X		
Global education	www.global-almaty.com	Kazakhstan	Almaty	1	n/a	1995	A	X	X	X	n/a		
Frankfort	www.frankfort.ru	Russia	Moscow	1	6	2004	A	X	X	X	X		
Intervega education	www.its-intervega.com	Turkey	Istanbul	3	5	1997	A	X	X	X	X		
Aspet	www.gobstudy.com.ua	Ukraine	Kiev	2	n/a	1995	A	X	X	X	n/a		
Yakin bat education	www.yakinbat.com	Turkey	Istanbul	4	0	1995	A	X	X	X	X		
Jurabet-A	www.jurabetil.com.tr	Turkmenistan	Samarhand	1	40	1990	A	X	X	X	X		
Mr English Touristab	www.mrenglishtour.ru	Russia	Moscow	1	12	2002	A	X	X	X	X		
Menden group	www.menden.lt	Lithua	Vilna	14	17	1994	A	X	X	X	X		
York group educati	www.yorkstudy.ru	Russia	Moscow	1	13	1997	A	X	X	X	n/a		
Global dating	www.globaldating.ru	Russia	Moscow	1	6	2005	A	X	X	X	X		
International itla	www.itla.ru	Russia	Moscow	2	n/a	1995	A	X	X	X	n/a		
Study tour	www.study-tour.ru	Russia	Moscow	1	n/a	n/a	A	X	X	X	X		
Megaron educational	www.megaron.org	Russia	Moscow	1	12	1992	A	X	X	X	X		

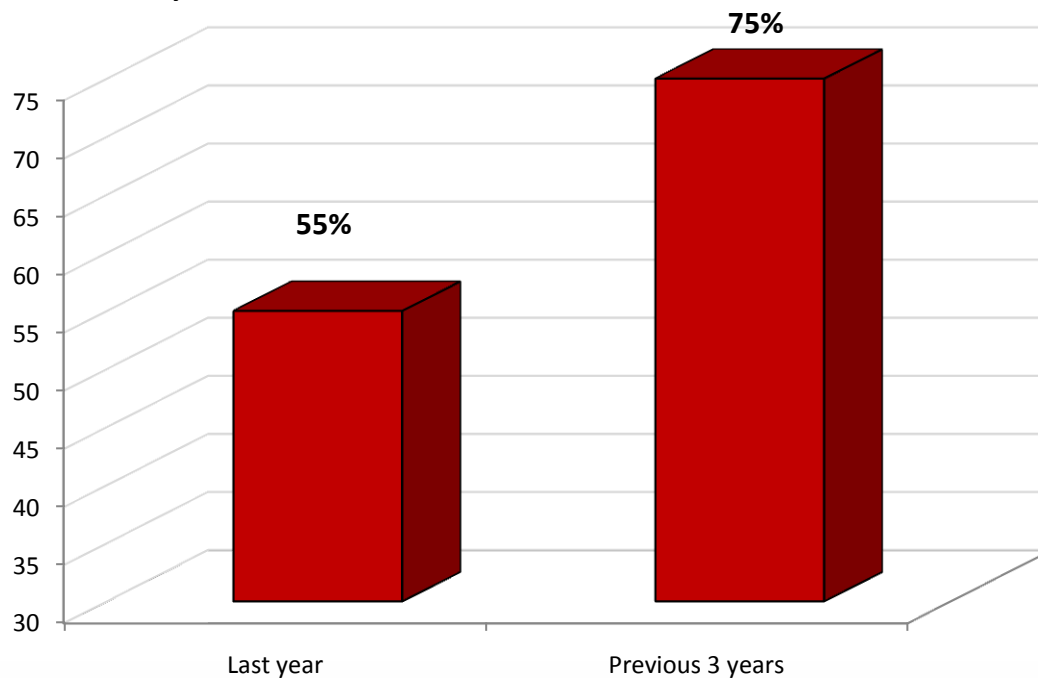
Using previous understanding and profiling agents, **identification of the most suitable quality agencies** can be done as mention herein (sample picture only).

# Educational Agencies – CEE



## Where to establish partnership with agencies

Workshop attendance of top 100 agencies  
in last 3 years



Other ways to partner with agencies:

- Workshops
- Association trade mission
- Individual sales trips to source markets
- Online platforms e.g. ICEF Online or Hothousemedia's InTouch
- Cold calling & emailing

Source: StudentMarketing 2011

# Questions & Answers



Do educational agencies care for the students and the institution, or are mostly commission driven?

What are agents after, commission or profit, short-term or longterm quantity or quality?

Who controls their quality – how to distinguish quality agencies from unqualified agents?

How can an agent, not being an educational expert decide on whether a student is good or not?

How to pay agencies – what are the possible models in place?

# Working with agencies

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Samuel Vetrak, StudentMarketing Ltd.

Thank You!