



AN AMERICAN AND CANADIAN VIEW ON STUDENT MOBILITY

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SERVICES FOR
INTERNATIONAL
EDUCATION
MARKETING
CONFERENCE 2014



SESSION SPEAKERS

ROTATIONS

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WHY CANADA AND THE USA?

Growth

Ease of access

Quality of student

Range of subject interests

Lower price sensitivity

Low migration factor

Best 'fit'

MARKET CHALLENGES

**VAST, MATURE,
EXPENSIVE,
COMPETITION**

Where should we go?

What should we do?

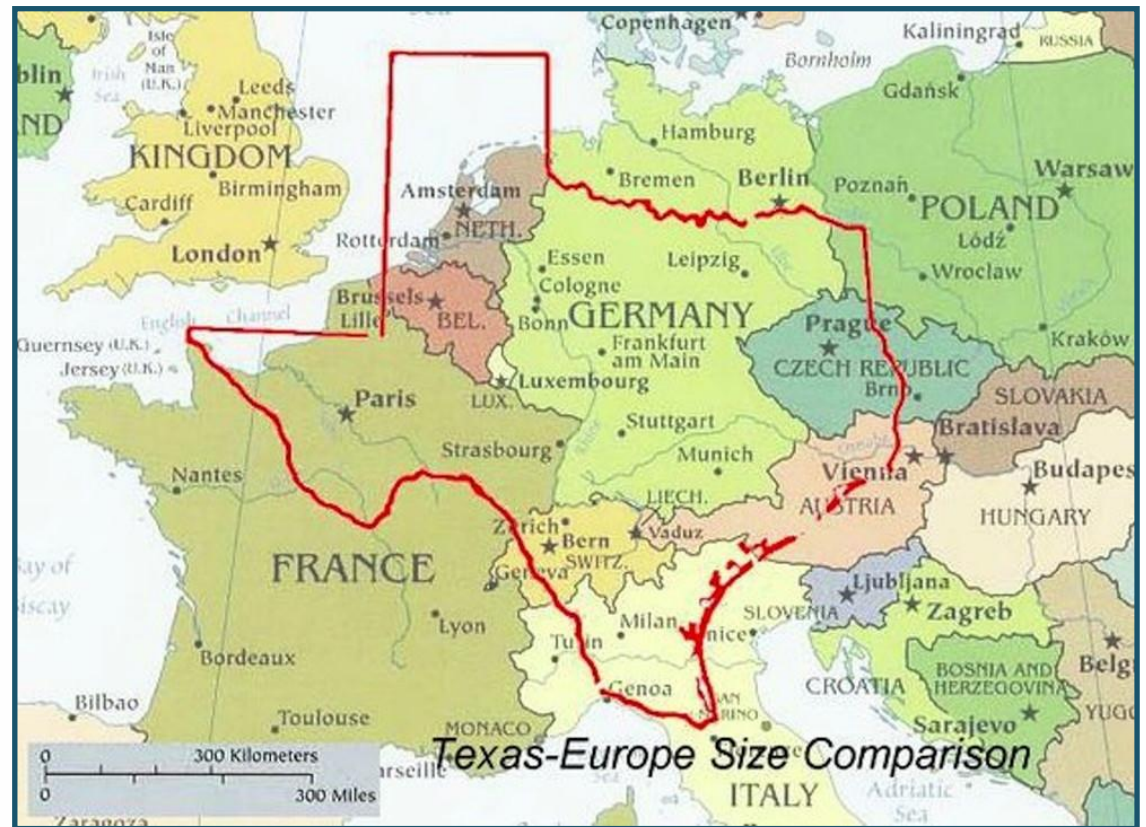
How can we reach students?

VAST

Canada/US

13%

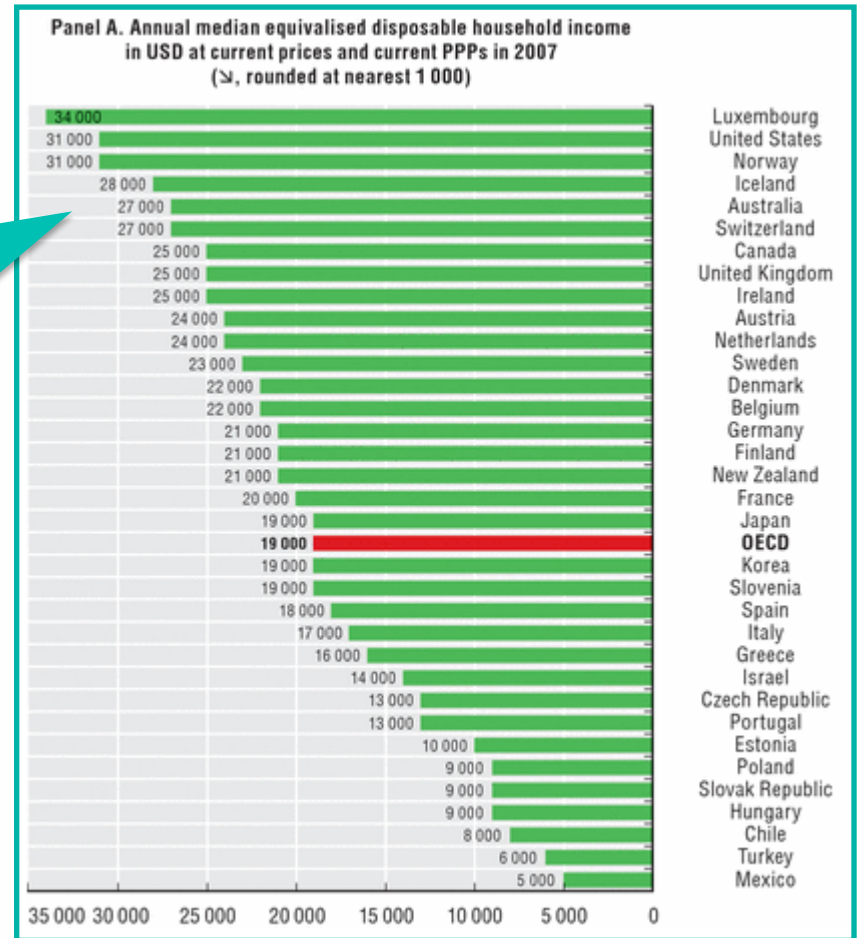
GLOBAL AREA



WEALTH

OECD DISPOSABLE HOUSEHOLD INCOME

USA \$31,000
Canada \$25,000



LOCAL PROVIDERS

95

CANADA

2,870

USA

HOW DO WE REACH STUDENTS INTERESTED IN STUDYING IN THE UK/AT MY INSTITUTION?

0.24%

Americans that study in the UK as a % of Americans that study in the USA

IN THIS SESSION

The data

- ✓ Establishing benchmarks
- ✓ Which states/provinces are most mobile
- ✓ Conversion

New York & Ontario: Recruitment

- ✓ Insights from a diverse range of local institutions on how they recruit

Student decision making

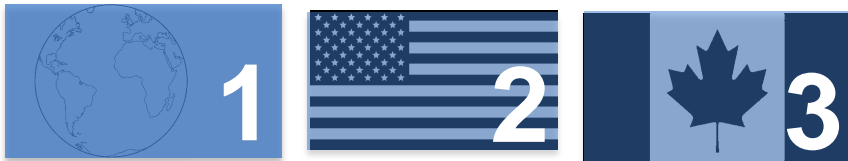
- ✓ Summary responses from recent student focus groups

So what?

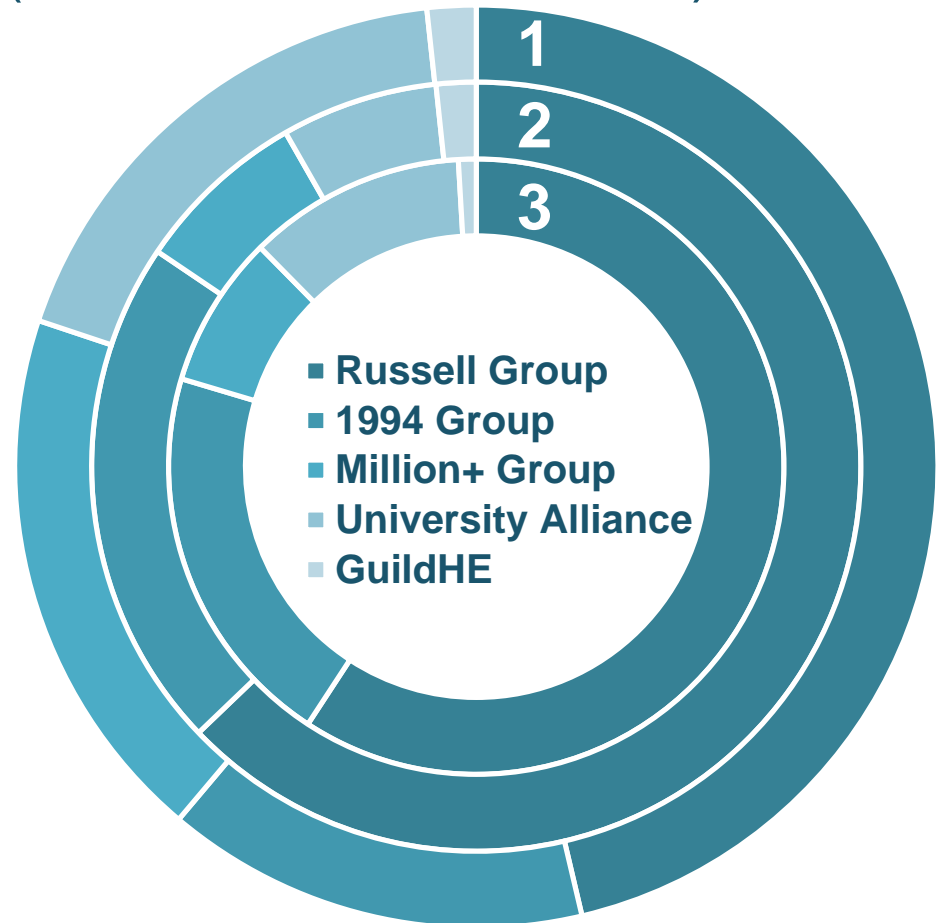
- ✓ Suggested actions based on data, interviews and focus groups

DATA

UK BENCHMARKING: CANADA, US & THE WORLD BY MISSION GROUP HESA (UGT, PGT, PGR, 2012)



INSTITUTION GROUP	CANADA	UNITED STATES	GLOBAL
Russell Group	59%	63%	46%
1994 Group	20%	22%	15%
Million+ Group	8%	7%	19%
University Alliance	11%	7%	18%
GuildHE	1%	2%	2%



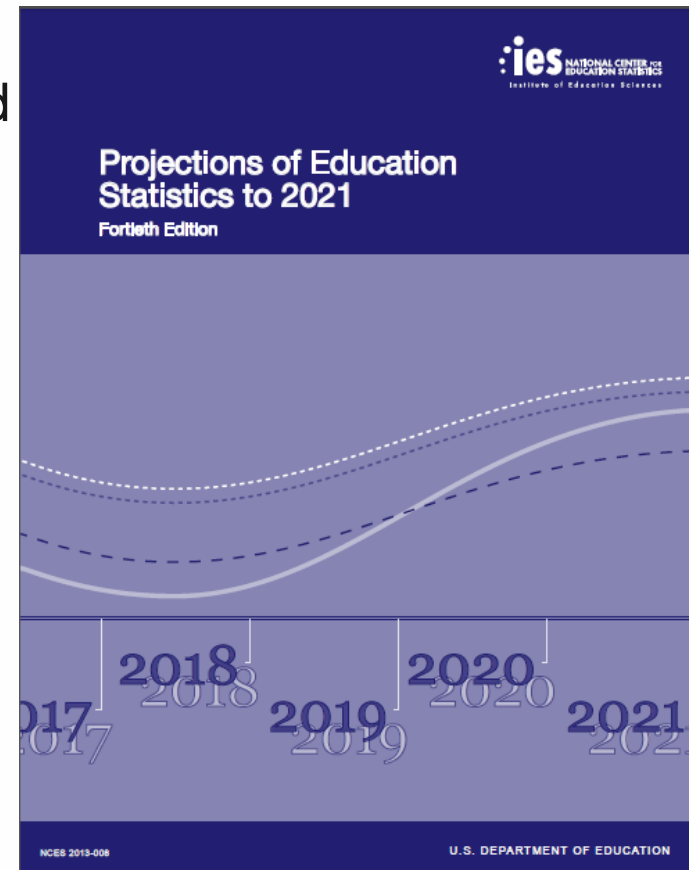
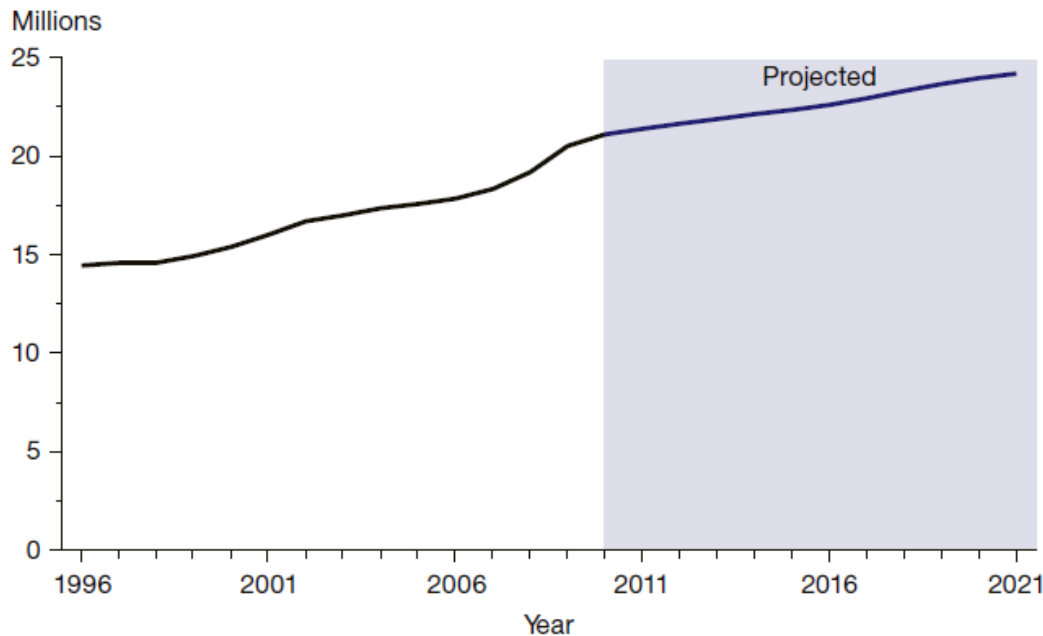
UK BENCHMARKING: CANADA, US & THE WORLD BY UK REGION HESA (UGT, PGT, PGR, 2012)

REGION OF INSTITUTION	CANADA	USA	WORLD
North East	4%	4%	5%
Yorkshire & The Humber	5%	3%	8%
North West	6%	4%	8%
East Midlands	7%	3%	6%
East of England	7%	7%	7%
South East	16%	14%	12%
London	24%	30%	22%
South West	5%	4%	6%
West Midlands	7%	3%	8%
Scotland	16%	25%	11%
Wales	4%	3%	5%
Northern Ireland	0%	1%	1%

US ENROLLMENT PROJECTIONS

15% increase between 2008 – 2021 expected

Figure 16. Actual and projected numbers for total enrollment in all postsecondary degree-granting institutions: Fall 1996 through fall 2021



CANADIAN ENROLLMENT PROJECTIONS

5, 9 & 15% increase projected between 2012 and 2020

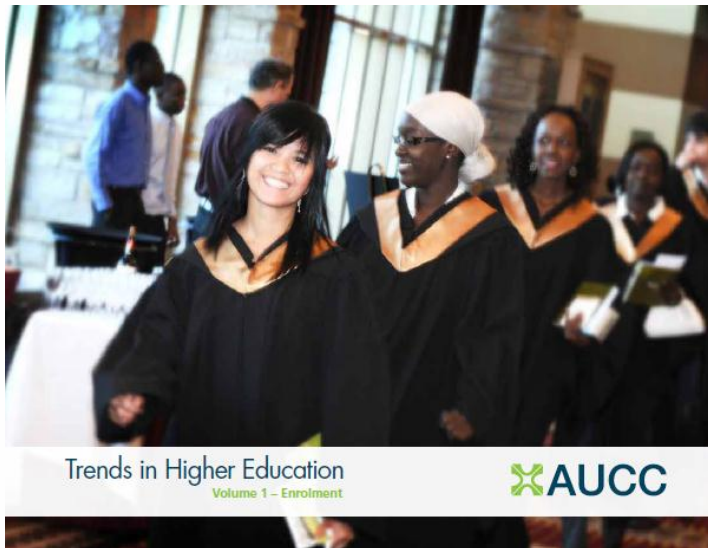
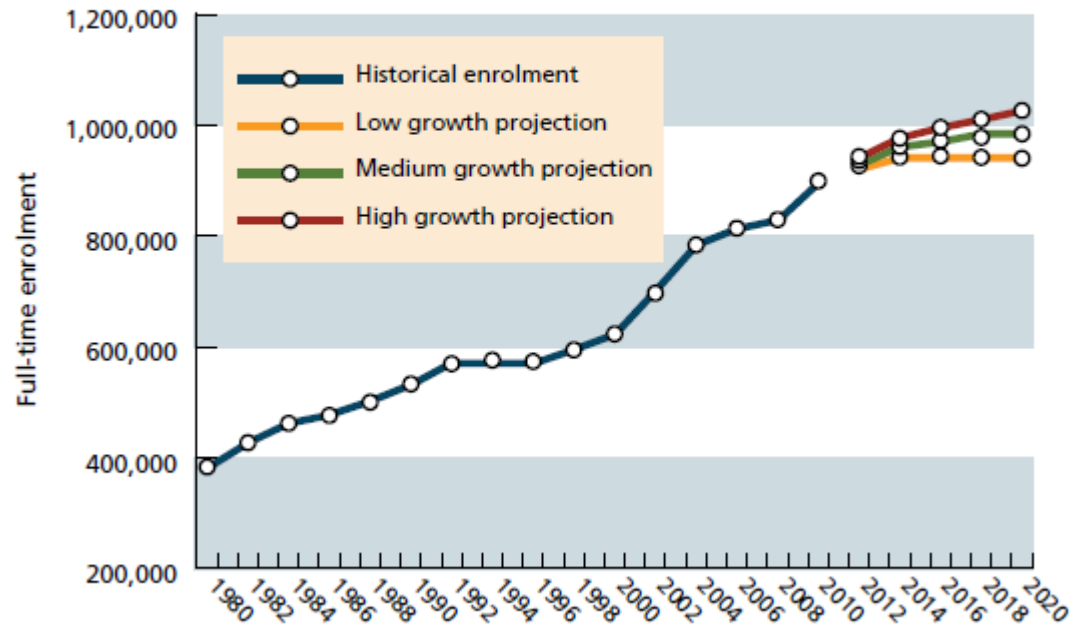
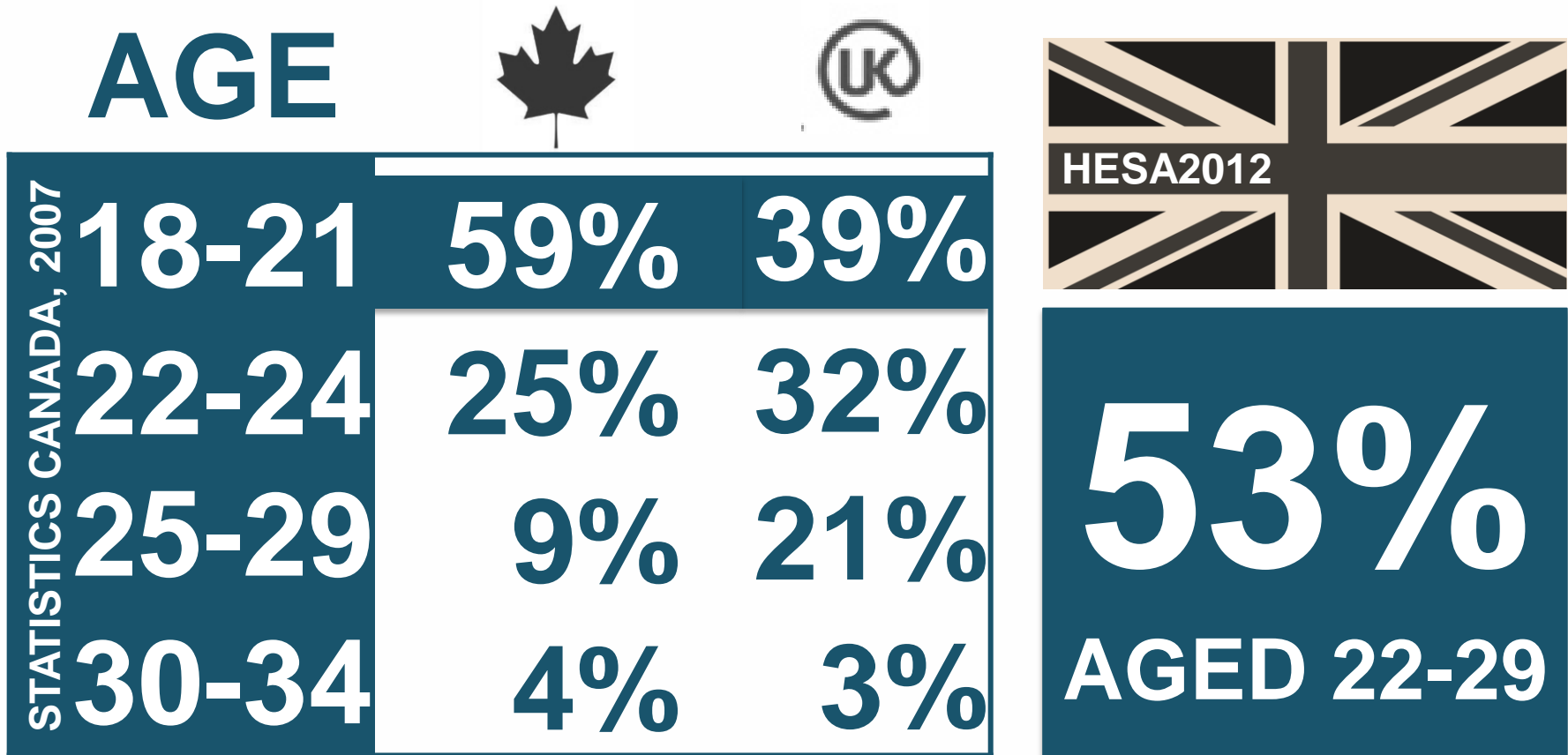


FIGURE 54: Enrolment increases over the coming decade are expected to be somewhat slower than historical trends due to the impact of population declines



Source: Statistics Canada data and AUCC estimates

AGE PROFILE OF ENROLLED UGT CANADIANS CANADA & THE UNITED KINGDOM



STATISTICS CANADA, 2007

AGE PROFILE OF ENROLLED PG AMERICANS THE UNITED STATES & THE UNITED KINGDOM

AGE



22-24	18%	32%
25-29	31%	32%
30-34	17%	14%

DOMESTIC FRESHMAN MIGRATION OUT-OF-STATE STUDENTS, NCES 2012

TOP 5 SENDING STATES

California	31,709
New Jersey	30,878
New York	27,954
Illinois	27,947
Texas	19,389

TOP 5 NET SENDING STATES

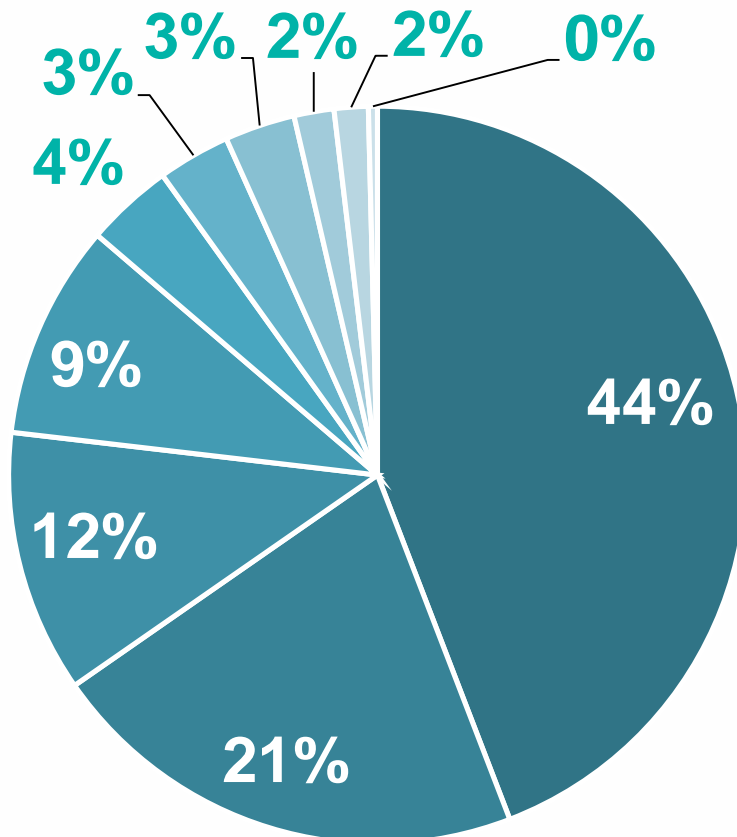
New Jersey	26,677
Illinois	15,953
California	15,067
Texas	11,321
Maryland	8,130

% O-O-S FRESHMAN

New York	31%
Illinois	25%
New Jersey	16%
California	13%
Texas	9%

WHERE ARE CANADA'S STUDENTS?

AUCC, 2014



1 MILLION STUDENTS

- Ontario
- Québec
- British Columbia
- Alberta
- Nova Scotia
- Manitoba
- Saskatchewan
- New Brunswick
- Newfoundland & Labrador
- Prince Edward Island

77%

OVER
200,000
STUDENTS

OR

20%



UNIVERSITY OF
TORONTO

YORK 
UNIVERSITÉ
UNIVERSITY

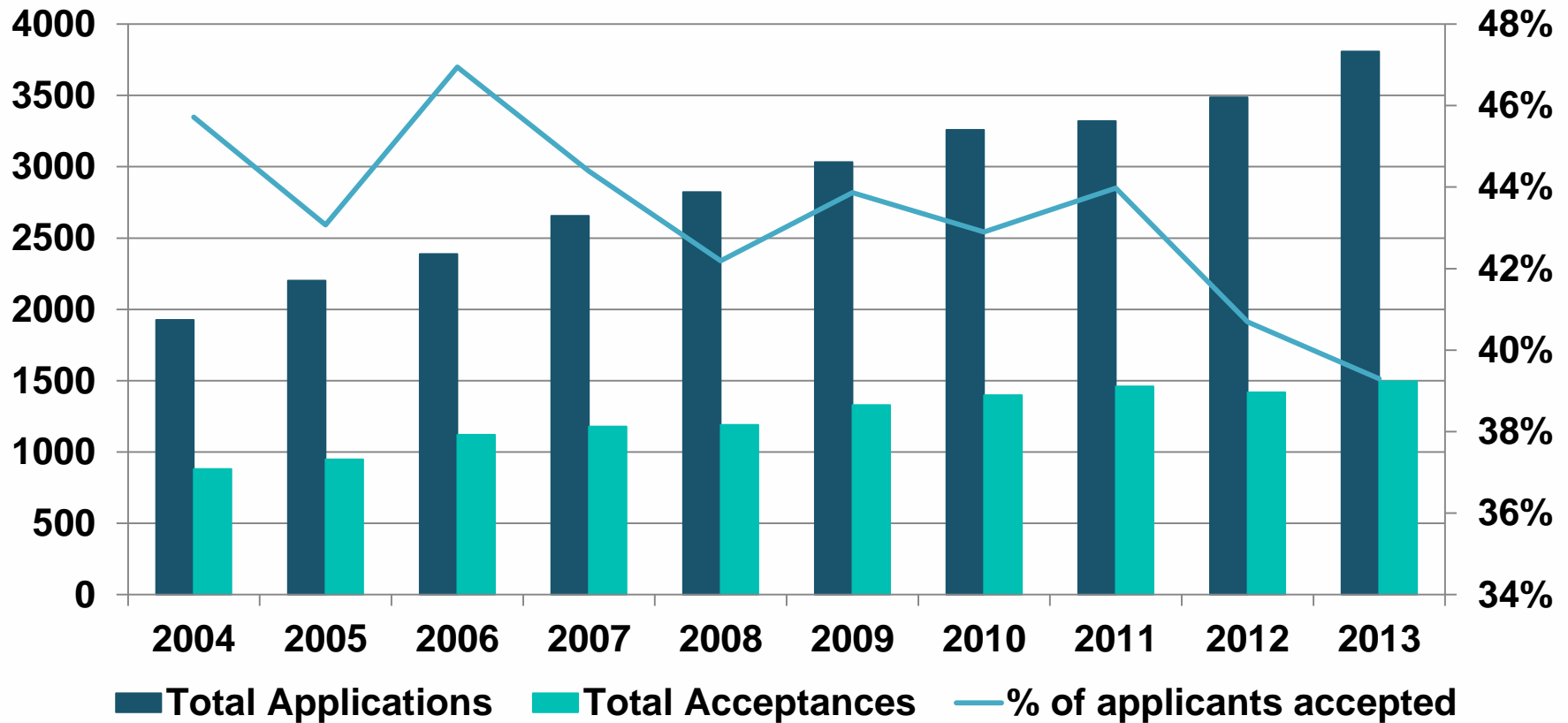


a place of mind
THE UNIVERSITY OF BRITISH COLUMBIA



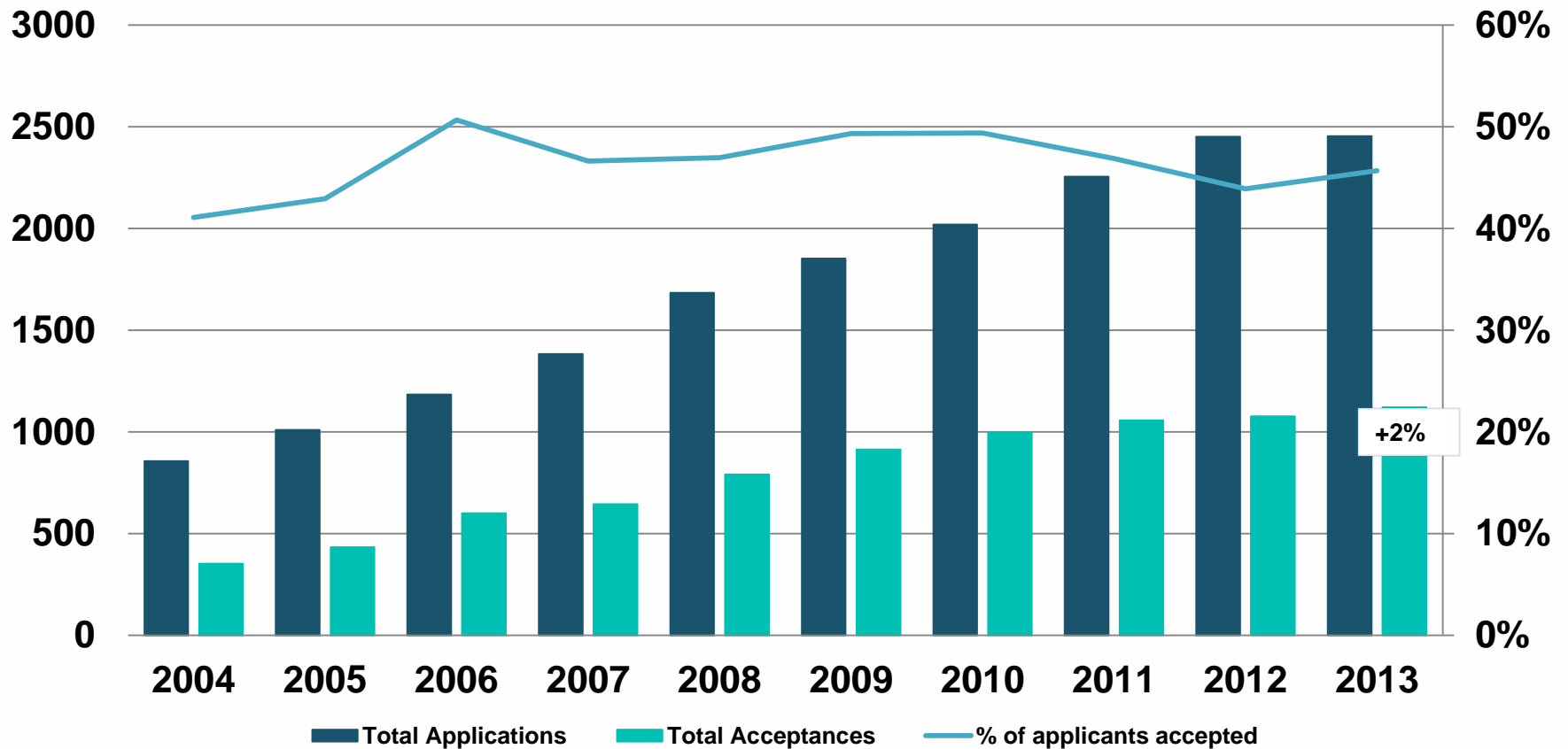
uOttawa

UCAS AMERICAN ACCEPTANCE RATES 2004-2013



Sources: UCAS data (<http://www.ucas.com/data-analysis/data-resources>)

UCAS CANADIAN ACCEPTANCE RATES 2004-2013



Sources: UCAS data (<http://www.ucas.com/data-analysis/data-resources>)

UNIVERSITY INTERVIEWS

COMMON MARKETING, ADMISSIONS
AND RECRUITMENT PRACTICES

EXAMPLES OF PRACTICE IN ONTARIO AND NEW YORK





NYU





THE BIG APPLE, GLOCAL, DIVERSIFY

COMMUTER SCHOOL TO
NEW ELITE
\$\$\$ AND THE CITY

LOCAL STUDENTS

NORTH EAST

AMERICA

WORLD

THE NEW SCHOOL



CHALLENGE THE STATUS QUO, CHANGEMAKERS

**NICHE OFFER
PARSONS EFFECT
NEBRASKA**

NORTH EAST

CALIFORNIA

SPECIALIST SCHOOLS

MARIST



MARIST

GLOBAL CITIZENS, BEST FIT STUDENTS, LIBERAL ARTS

36 YEAR PRESIDENCY
“MICROCOSMS
OF THE WORLD”

NORTH EAST

MID-WEST

FLORIDA, CALIFORNIA, HAWAII



UNIVERSITY OF
WATERLOO



“BEST CAREERS SERVICE IN THE WORLD”

5K EMPLOYER PARTNERS

STEM focus

Quality, grades, retention

Using agents

ONTARIO

BRITISH COLUMBIA

ALBERTA

QUEBEC



TECHNOLOGY, ACCESS, NEW CANADIANS

EST. 2002
STEM focus
86% LOCAL

GTA & ONTARIO

BRITISH COLUMBIA

ALBERTA

QUEBEC

EXAMPLE OF PRACTICE

***“Arts in New York tour
around the US”***

EXAMPLE OF PRACTICE

“Purchase names through College Board, reach out once, if they don’t respond, don’t pursue”

EXAMPLE OF PRACTICE

**“Invite teachers to
campus to take a class
with prominent faculty”**

EXAMPLE OF PRACTICE

**“Student ambassadors
on social media”**

AWARENESS

ENGAGEMENT

ACTION

ENROLMENT

- ✓ Lead buying/generation
- ✓ Email campaigning
- ✓ Website optimization
- ✓ Interactive opportunities for/with students
- ✓ Google hangouts, chats, facebook and twitter
- ✓ New digital strategy – QR codes at bus stops
- ✓ Counsellors, parents and students
- ✓ Parents are king
- ✓ Routes to employment
- ✓ School visits, breakfasts, receptions
- ✓ Present at conferences
- ✓ Math and science competitions in schools
- ✓ Master classes for high school teachers
- ✓ Info sessions every day

TOP TIPS ONTARIO

STRONG PRIVACY LAWS

**NEW CANADIANS STAY HOME
MOBILITY DROPS OUTSIDE OF
ONTARIO, BRITISH
COLUMBIA, ALBERTA AND
QUEBEC**

**NOT ALL STUDENTS HAVE
GUIDANCE COUNSELLORS**

COUNCIL OF ONTARIO UNIVERSITIES

**ONTARIO UNIVERSITIES' COUNCIL ON
ADMISSIONS**

**ASSOCIATION OF UNIVERSITIES AND
COLLEGES CANADA**

**CANADIAN BUREAU FOR INTERNATIONAL
EDUCATION**

**ONTARIO UNIVERSITY REGISTRARS'
ASSOCIATION**

**ONTARIO SCHOOL COUNSELLORS
ASSOCIATION**

**ONTARIO COUNCIL OF ACADEMIC VICE
PRESIDENTS**

TOP TIPS NEW YORK

NACAC, IECA,
NYSACAC, NRCCUA,
CANY and OACAC

COLLEGE
BOARD/ACT

MAGUIRE
ASSOCIATES

FIRE ENGINE RED

RUFFALO CODY

CHRONICLE

CHEGG

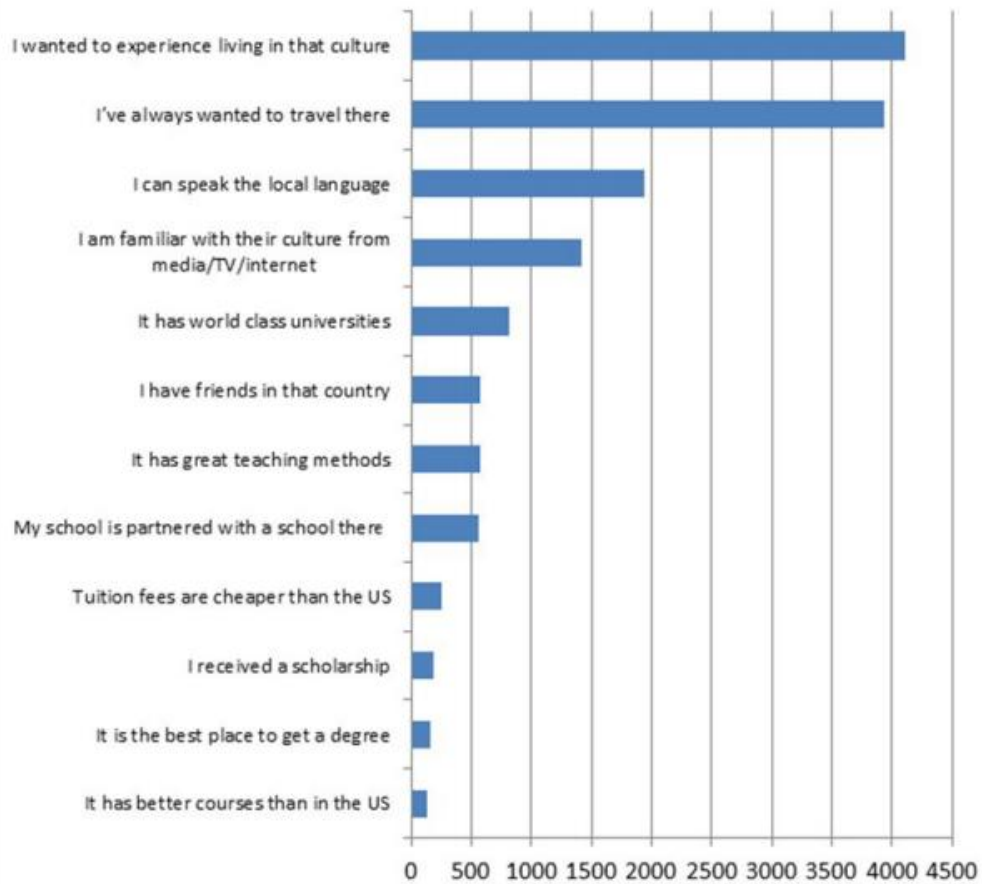
ROYALL

STUDENTS

FOCUS GROUPS

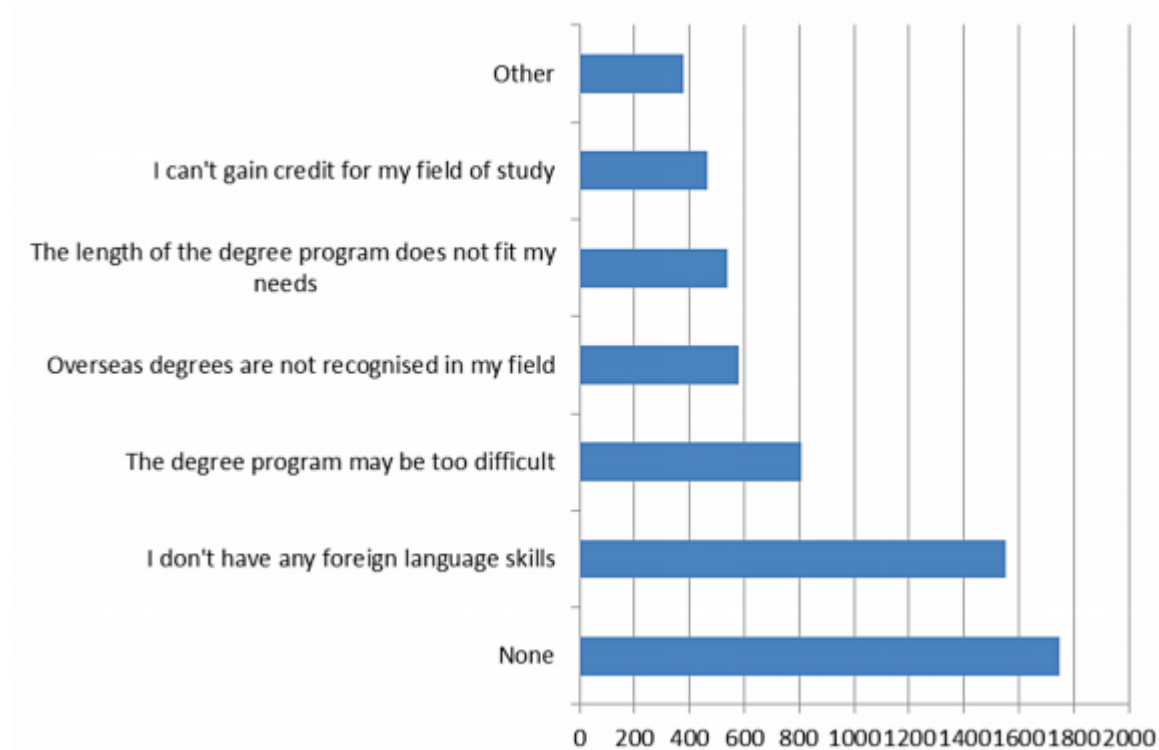
STUDENT INSIGHT

Reasons for choosing study abroad destination



STUDENT INSIGHT

Academic reasons for not wanting to study abroad



STUDENT INSIGHT

“I agree the website is extremely important. Coming here I had to base basically all my decisions on a website and what I saw there.”

“I think when you’re doing primary research, you base it off the university website.”

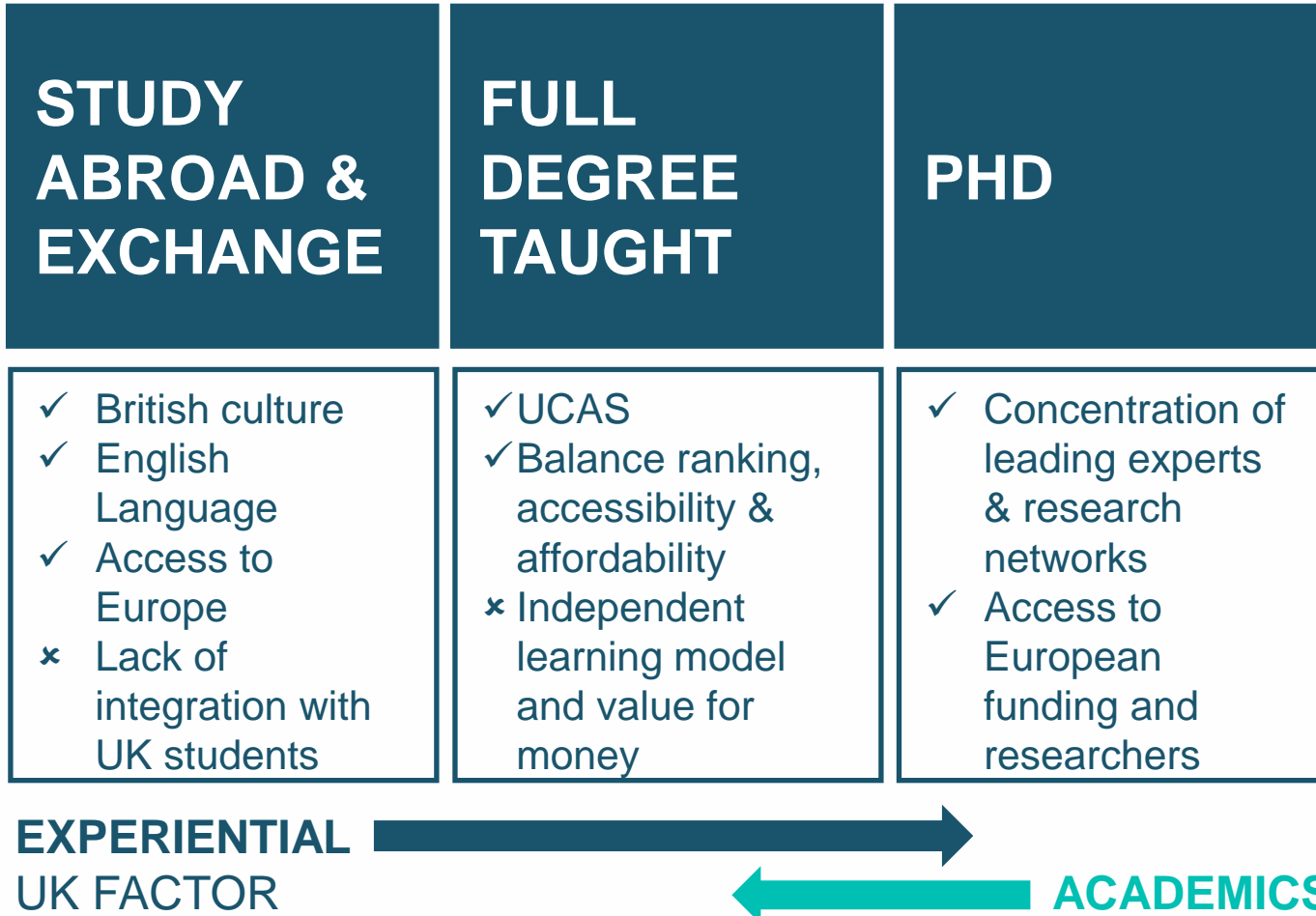
“I knew someone that studied abroad as well and was in a similar programme. That was kind of a deciding factor.”

“I don’t think there are any British universities who come to Canada for fairs.”

“Well, they go to Toronto, I think.”

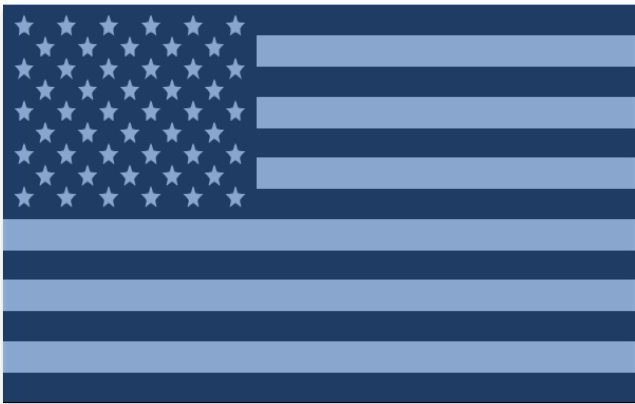
“There’s nothing in Vancouver. I’m quite sure of that.”

STUDENT INSIGHT



THE SO WHAT FACTOR

BRITISH COUNCIL
CANADA AND USA OPINION



FIT



CHANGE

GROWTH

TAKEAWAYS

AWARENESS RAISING AND DIGITAL

DIVERSIFY STATES AND PROVINCES

ENGAGE NEW CANADIANS AND AMERICANS

CONVERSION MARKETING AND COST PER ACQUISITION

INFLUENCERS

CREATE EXPERIENCES THAT SHOWCASE YOU

ROUNDTABLE DISCUSSIONS

**NEW IOs:
CANADA**
CEECEE LU

CANADA
ELIZABETH
MCCALLION

**NEW IOs:
USA**
QU TING
ZHENG

**USA:
UGT**
JOSEPH
KIRK

**USA:
PGT**
TAMSIN
THOMAS

**JOHN
SHALAGAN**

**STEVEN
ANTONOFF**

