

Turning Accommodation into a Winning Solution

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33rd ISANA Conference - December 2023



Market Trends - Political



Highly competitive: country v country, state v state, institution v institution, agent v agent leading to disruption and misinformation

= *value proposition focus and student centred products required*

Volatile and dynamic: accommodation crisis = government visa controls increasing

= *reputation, strong partnerships and speed to respond required*

Market Trends – Political (2)



Unpredictable

= strong planning, adaptability, staying in touch, and responsiveness required

War

= strong planning, strong partnerships and diversification (multiple markets)

Covid-19 Pandemic

= cautious marketplace and built-up demand / supply challenges (e.g., safety & accom)

Market Trends – Economic

Top 3 Economic Trends

Over 8M enrolments forecast by **2025**
(~5M current)

Full online and blended (online/on campus) expected to increase
(decreased cost will increase the mobile market size)

Rental crisis globally forecast to restrict and influence student mobility
(availability and high prices)

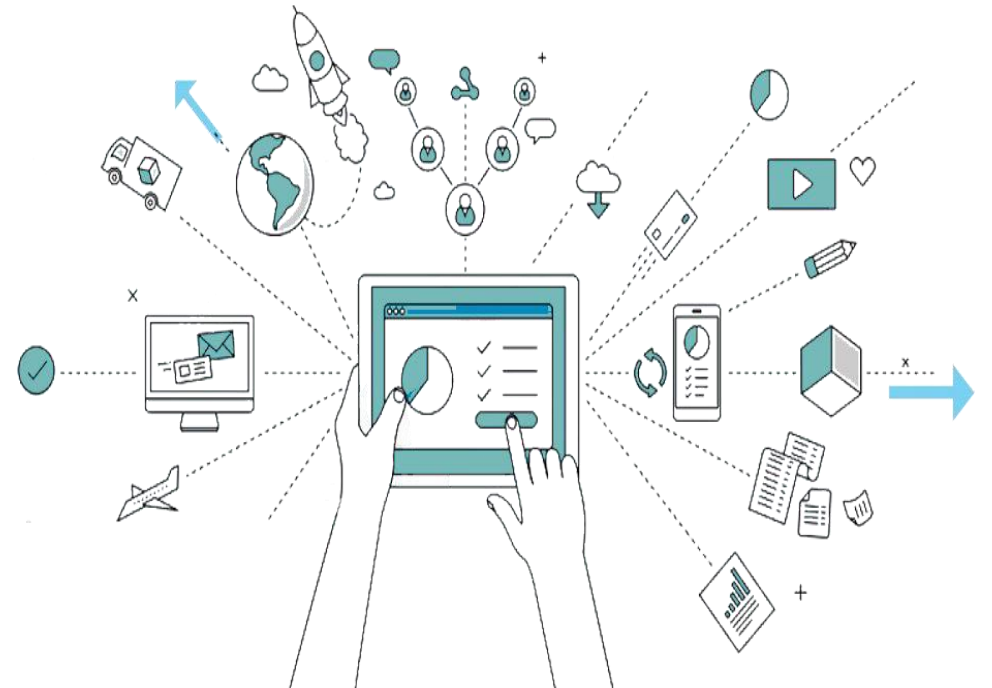
Market Trends - Social

- Students will always want to travel for their education
- The demand shift from on-campus to off-campus and online cannot be ignored however is anticipated to increase student mobility
- The shift has been accentuated by Covid-19
- Universities are expanding access to education through technology
- International enrolment reinforces tolerance and inclusion





Market Trends - Technological

- Cyber security is a priority
- Learning Management Systems (LMS) explosion
- Shift from in-house servers to cloud storage
- Interoperable platforms and partnerships



Market Trends - Legal



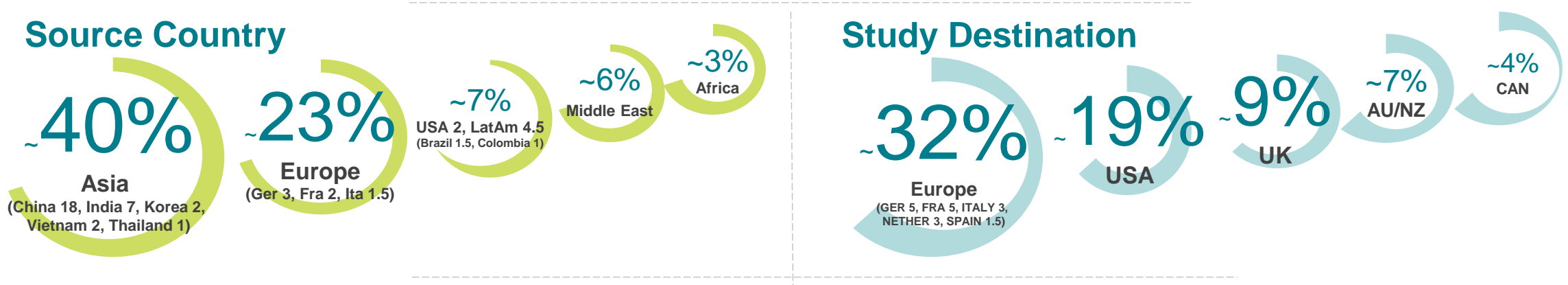
- Due process focus – informing consumers prioritised
- Negligent misrepresentation risk 
- Discrimination – PR and claim risk 
- Breach of contract
- Student exploitation (in the community)
- Changing visa requirements

Market Trends - Environmental

- International education reliant on carbon economy
- UN encouraging increase in higher education as environmental solution source
- Education is the answer!
 - This needs to be better promoted at all levels



Student Mobility – A Significant Global Opportunity*



- The industry is huge and virtually indestructible
- Growth and success is directly influenced by exceeding customer expectations
- Some will get left behind in the new era

*Based on 2019 Data

AHN

**Australian Homestay
Network**

Trends

Based on data from Australian Homestay Network (AHN)

Matching Fees (Bookings)

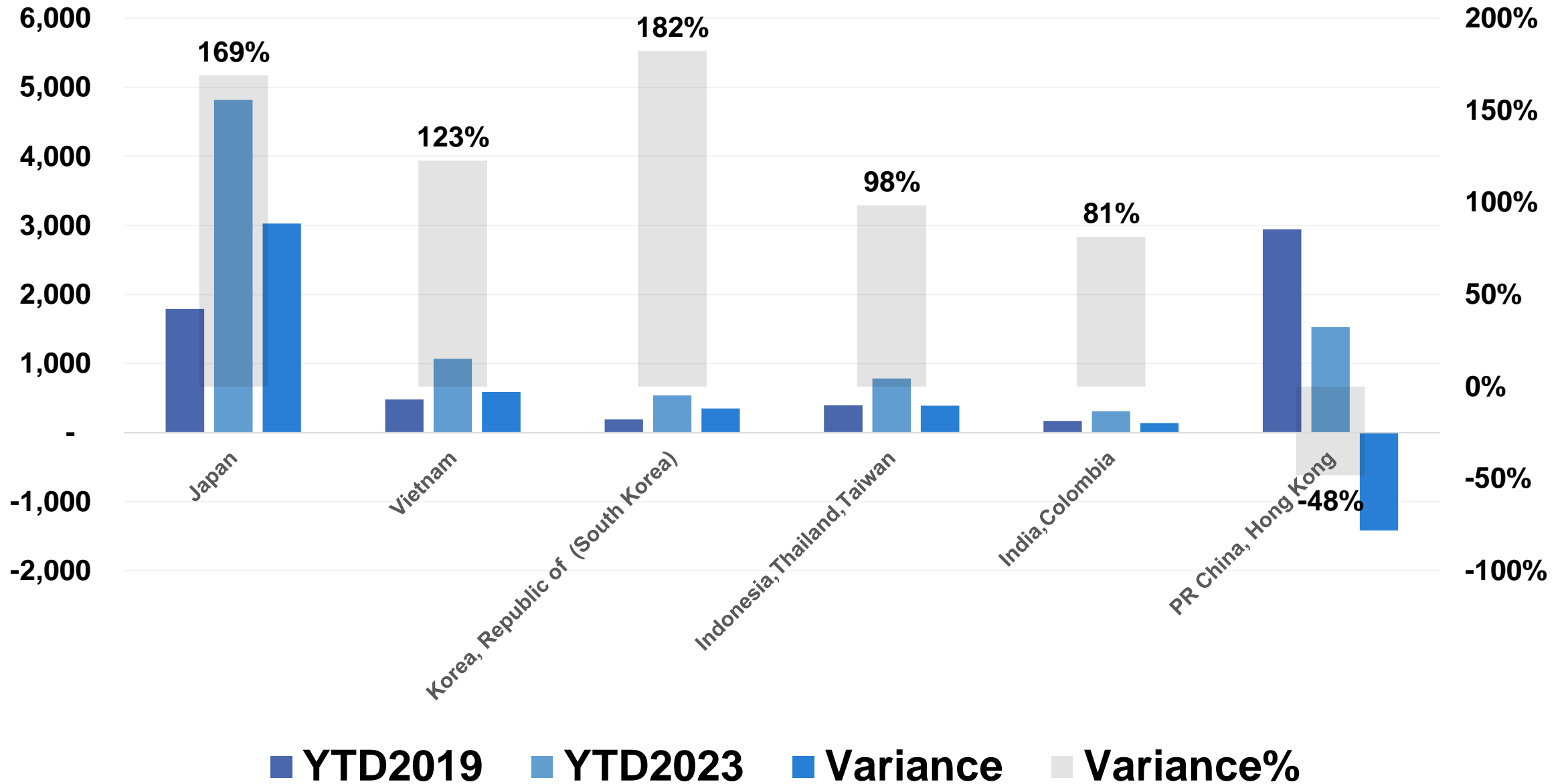
- CYTD (JAN-OCT) 2019 vs 2023

- Demand has surged post-COVID
 - **5,894 to 9,338**
 - **58.4%** increase in bookings 2023 vs 2019
- Interestingly Sept-Oct 2023 shows promise for 2024
 - AHN bookings increased **74.2%** vs 2019
 - **708 to 1,233** (Sept-Oct 2019)



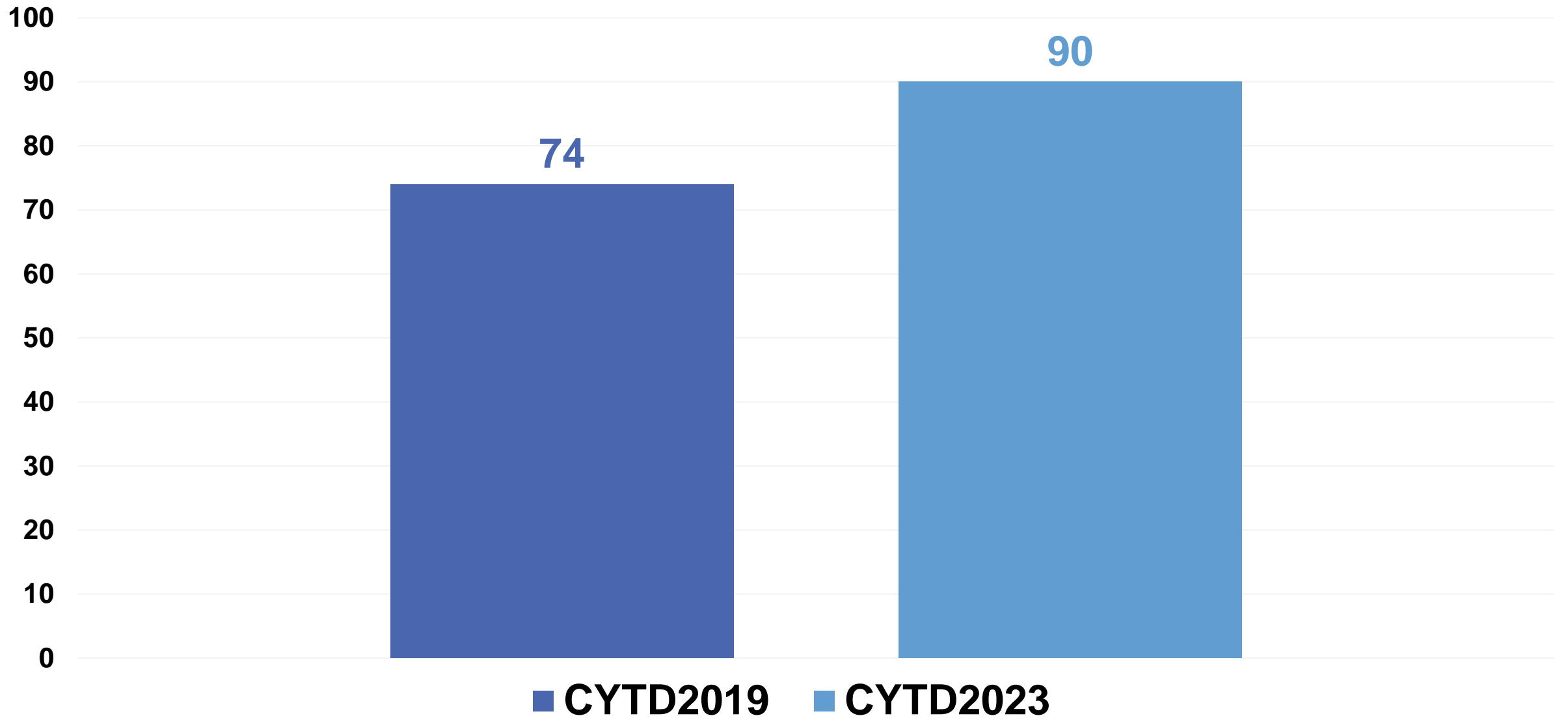
Active Placements by Nationality (Top 10)

CYTD (JAN-OCT) 2019 vs 2023



Unique Guest Nationalities Represented in AHN Placements

CYTD (JAN-OCT) 2019 vs 2023



New Nationalities Represented in 2023

Guest Nationality	2019	2023	Guest Nationality	2019	2023
Azerbaijan	NO	YES	South Africa	NO	YES
Brunei	NO	YES	Bhutan	NO	YES
Ethiopia	NO	YES	Bulgaria	NO	YES
Guatemala	NO	YES	Dominica	NO	YES
Hungary	NO	YES	Uganda	NO	YES
Jarvis Island	NO	YES	Uzbekistan	NO	YES
Kuwait	NO	YES	Argentina	NO	YES
Kyrgyzstan	NO	YES	Malawi	NO	YES
Lithuania	NO	YES	Netherlands	NO	YES
Venezuela	NO	YES	Reunion	NO	YES
Dem. Republic of the Congo	NO	YES	Zimbabwe	NO	YES
Mauritius	NO	YES	Belgium	NO	YES
Norway	NO	YES	French Polynesia	NO	YES

Missing Nationalities Not Represented in 2023

Guest Nationality	2019	2023
Cameroon	YES	NO
Cyprus	YES	NO
Finland	YES	NO
Namibia	YES	NO
Sudan	YES	NO
Ukraine	YES	NO
Wallis and Futuna	YES	NO
Yemen	YES	NO
Algeria	YES	NO
Bahrain	YES	NO

Hosts - CYTD (JAN-OCT) 2019 vs 2023

- 30.8% increase in applications nationwide
- Stronger partnerships with industry
- Increased spend in online advertising
 - WA saw a 107% increase - UWA & Study Perth commitment
 - NSW had the biggest increase after WA
 - VIC 21% up on CYTD 2019

Opportunities and solutions to maximising your numbers and competitiveness

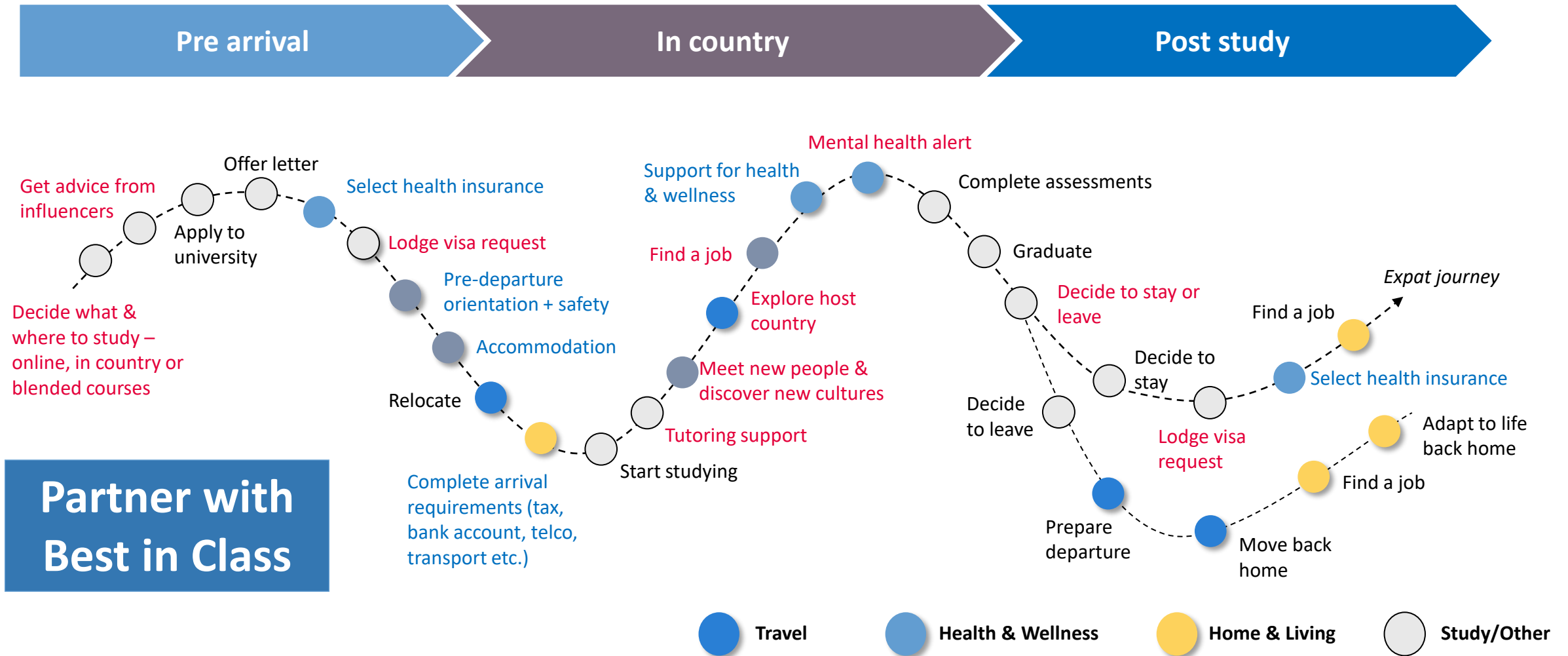
- Value proposition focus and student centred products required
- Reputation, strong partnerships and speed to respond required
- Strong planning, adaptability, staying in touch
- Improve/expand use of appropriate tech and AI
- Ensure blended (online/on campus) package offering

Opportunities and solutions to maximising your numbers and competitiveness

- Chat GPT – need to embrace and make relevant
- Commitment to standards-based hosted accommodation strategy
 - Choose a recognised standards-based provider to partner with
- Strong partnerships and diversification – across all aspects
- Focus on The Entire Student Journey

Embrace The Entire Student Journey

To Enhance Your Own Relevance To The Customer



Questions



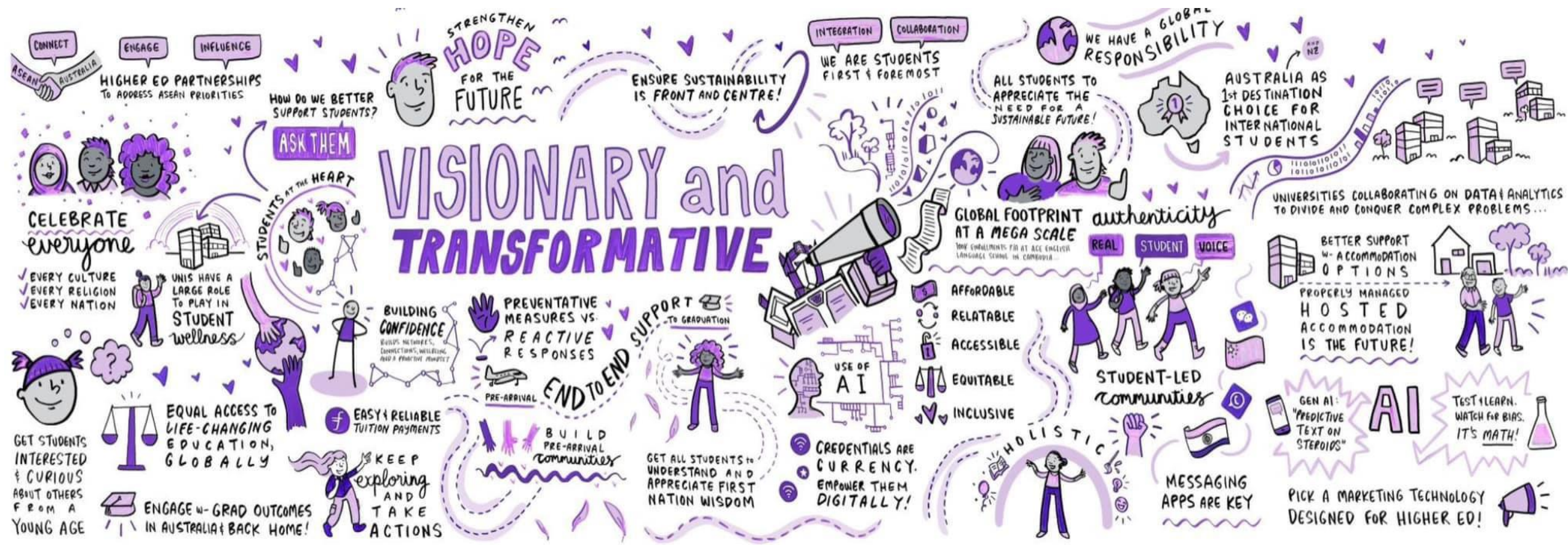
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