

Competitive Analysis 2007 Update

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Camosun Educational Market Analysis

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Summary

By 2007, the growth of postsecondary institutions competing in the Victoria education market has slowed, with only 9 new institutions entering the greater Victoria educational market since 2005. Three quarters (73%) of the institutions included in this study were located in Victoria and almost all (86%) institutions were private providers. Less than a quarter (22%) offered post-degree credentials, such as advanced certificates and diplomas. A recent development in the postsecondary educational market is the posting of warnings by various Asian governments suggesting that their students avoid private educational providers in Canada.

A quarter (23%) of the Camosun College competitors in 2007 offered a wide range of programming and, because of this, they deserve focussed attention. These institutions compete head-to-head with Camosun programs, sometimes with the same name and the same qualification offered. The most significant institutions in this group were: the University of Victoria, Sprott-Shaw Community College, Thompson Rivers University - Open Learning, Malaspina University College, Royal Roads University, CDI College of Business and Technology, and Academy of Learning. These postsecondary providers were very important competitors because of their size, location, breadth of programming, and similarity of programming. In addition, the private providers offer a number of delivery options such as online delivery, compressed delivery, evening and part-time delivery, and frequent intakes.

The moderate competitors typically offered programs in a number of Camosun's programming areas but they either do not offer the comprehensive suite of programs of the high competitors or they do not target the same section of the postsecondary education market. The broad postsecondary institutions rated as at a low level of competition with Camosun College were usually advertising in Victoria but did not have a local campus.

Half (58%) of Camosun's competitors were specialized providers, typically offering one program or a very narrow group of programs offered by one Camosun school. The School of Access faced competition from many private language schools. The School of Arts and Sciences had a number of competitors for its fine arts programs. The Culinary Arts program was the Trades and Technology confronting the most specialized competitors.

Overall, Camosun College is challenged on all sides with small private providers offering specialized programs, large public and private providers offering very similar programming in a variety of formats, and institutions increasing the levels of programming offered, such as universities offering certificates and diplomas and vast continuing education programming. All of these factors make it more difficult for Camosun's programs to capture the attention of prospective students.

Camosun Educational Market Analysis

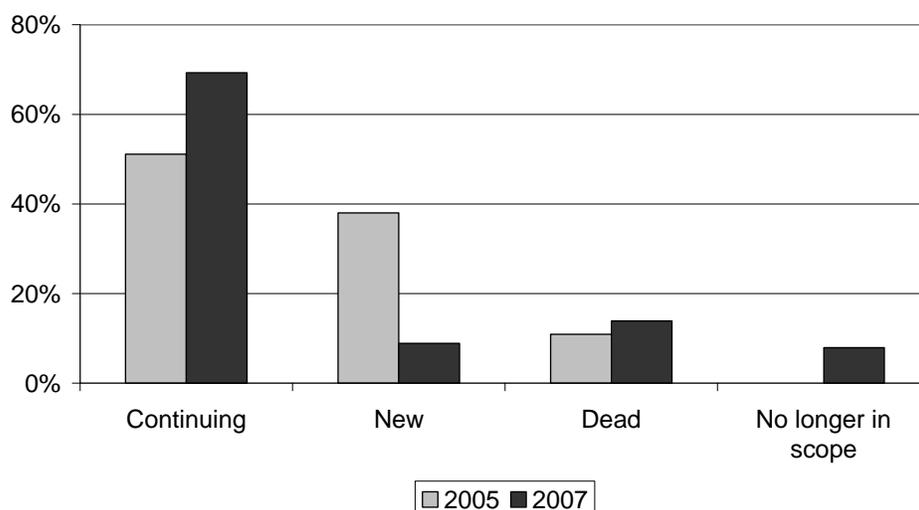
General Characteristics of the Camosun Educational Market

Number of Institutions

This study is an update of a competitive analysis conducted in 2005. In February 2007, all the postsecondary institutions competing in the Victoria education market were identified. Any institution that had a listing in the Victoria area telephone book, was listed by a Google search¹, or was included in the previous analysis was considered to have some presence in the Victoria education market and was included in the study.

Of the 100 institutions identified in 2007, 69 institutions had previously been identified in the 2005 competitive analysis, 9 were new postsecondary institutions, 14 institutions were no longer operating², and 8 were no longer in the scope of the analysis³.

**Camosun Educational Landscape
2005 compared with 2007**



¹ Search terms used included: "education Victoria BC", "college Victoria BC", and "post-secondary education Victoria BC".

² The postsecondary institutions no longer operating in Victoria in 2007 were: Bonistar Training and Human Resource Management, Canadian College for Chinese Studies, Canadian College of Film and Acting, Canadian Family Resource Institute/Career College, Canadian Pacific College International Ltd., CompuCollege, Computer Master Institute of Technology, CTI Counsellor Training Institute of Canada, Global Teach English Overseas College, the Longevity Centre, Melcomp Technical Institute, P B S C Computer Training Centre, Pacific Learning Connection, and Slipstream Adventures Ltd.

³ The institutions no longer in scope of the analysis included institutions that had ceased to operate in Victoria (such as closing the Victoria office of a chain), or were not primarily postsecondary institutions. These included: Ahead Institute of Technology Ltd., Applied Technology Training, CPR Society, Granton Institute of Technology, iTi Information Technology Institute, Priority 1 Computer Service, Vancouver Career College, and the Writing School (also called Winghill Writing School).

In the last two years, the increase in new postsecondary training providers has slowed, with only nine new institutions (9%) entering the greater Victoria postsecondary educational market between 2005 and 2007. Only continuing and new postsecondary providers will be included in the rest of this analysis.

Changes in the Postsecondary Educational Market

In December 2006, the Chinese government issued a warning to its citizens to avoid private postsecondary educational institutions in Canada because of a number of problems encountered by Chinese students, such as private providers offering degrees from unaccredited universities⁴. The Korean government has also issued a similar warning to its citizens in the fall of 2006. Camosun currently has about 500 international students. For the 2006 Winter session, 36% of Camosun's international students were from China and 11% were from Korea. Other large groups of international students came from Japan (21%), Taiwan (9%), and Hong Kong (6%). For the 2005/06 year, there were over 11,000 international students enrolled in data warehouse institutions in British Columbia⁵. There are many private language schools in Victoria and it will be interesting to see if Camosun and other public providers experience a rise in international students from China and Korea in the next five years. At the moment, the current situation is a clear opportunity for Camosun to differentiate itself as a reputable institution offering legitimate credentials.

Post-Degree Credentials

A new characteristic included in the 2007 analysis is whether an institution offers any post-degree credentials, such as advanced certificates, advanced diplomas, or graduate degrees. Less than a quarter (22%) of the currently operating postsecondary institutions in the greater Victoria educational market offered post-degree credentials. The institutions that did offer post-degree credentials were more likely to be public institutions,⁶ institutions that compete with a broad range of Camosun's programs,⁷ and institutions rated as highly competitive with Camosun College⁸.

The postsecondary institutions that offer post-degree credentials were: Athabasca University, BC School of Art Therapy, British Columbia Institute of Technology, Dubrulle International Culinary & Hotel Institute, Emily Carr Institute of Art & Design, Justice Institute of BC, Le Cordon Bleu Paris Cooking

⁴ See Vancouver Sun, 9 January 2007, <http://www.canada.com/topics/news/world/story.html?id=ad9f078b-90e2-4f56-a961-efdc0028a172&k=31797>, Ottawa Citizen, 18 January 2007, <http://www.canada.com/ottawacitizen/story.html?id=a1b5a501-a419-45da-9c5c-0681f54339f0&k=0>, or Federation of Post-Secondary Educators of BC, 15 January 2007, <http://www.fpse.ca/prescomment/070115prescmnt>. The key institution in BC is Kingston College which was ordered to close in October 2006.

⁵ See <http://www.aved.gov.bc.ca/datawarehouse/nov06/headcount-totals.pdf>.

⁶ Cramer's V = .499 and p < .01.

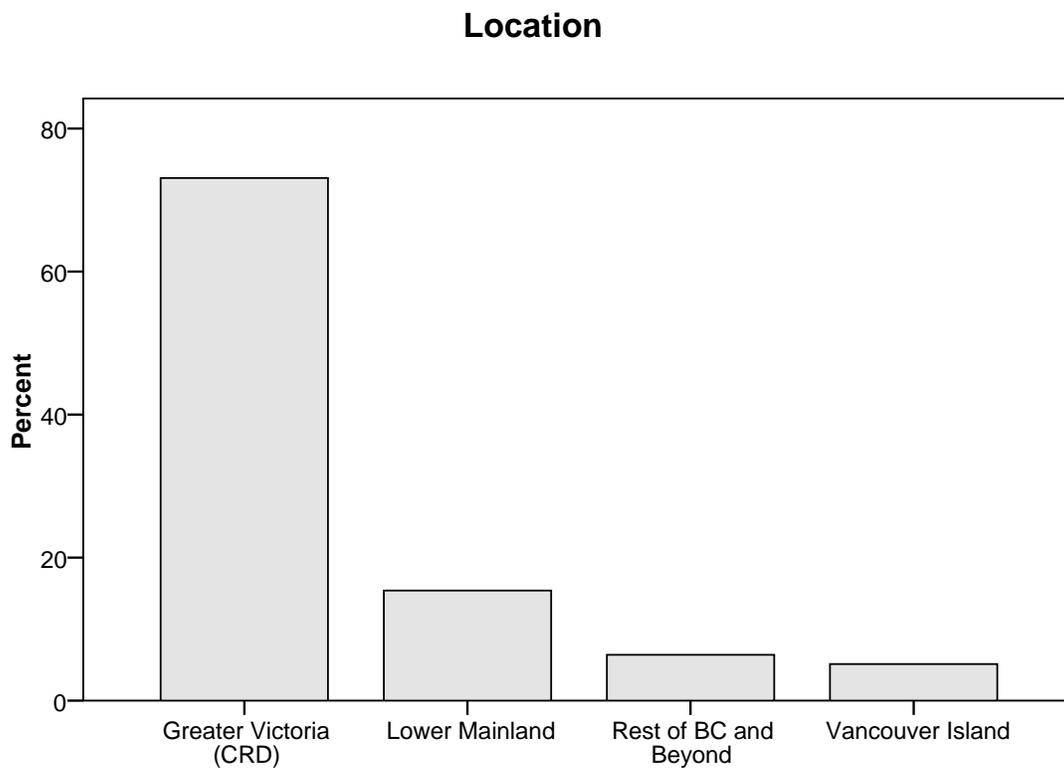
⁷ Cramer's V = .280 and p < .01.

⁸ Cramer's V = .307 and p < .01.

School, Malaspina University College, Okanagan Valley College of Massage Therapy Ltd, Pan Pacific International English College, Royal Roads University, Sprott-Shaw Community College, Thompson Rivers University - Open Learning, University of Phoenix, University of Victoria, Victoria College of Art, and West Coast College of Massage Therapy.

Location of Institutions

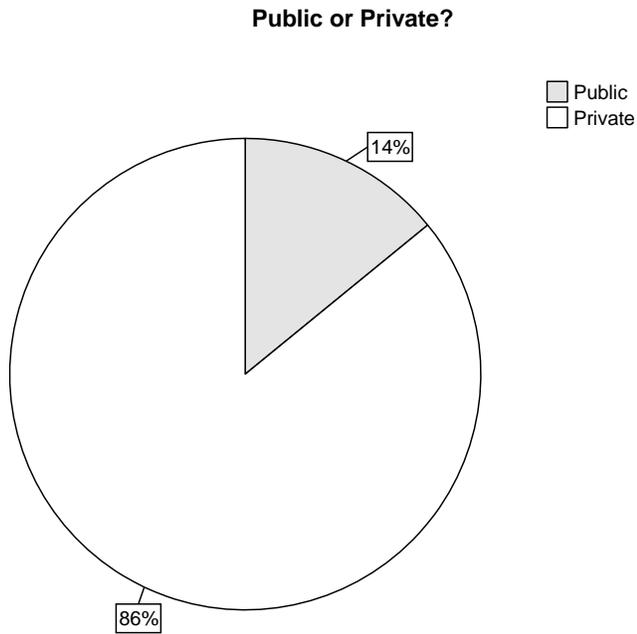
In 2007, about three quarters (73%) of the postsecondary institutions with a presence in the Camosun educational market were located in Greater Victoria, 5% were located elsewhere on Vancouver Island, 15% were located in the Lower Mainland, and 6% were located either elsewhere in BC or even further away.



In 2005, the distribution was very similar with 73% located in Greater Victoria, 5% on Vancouver Island, 14% in the Lower Mainland, and 8% either in the rest of BC or beyond.

Public or Private Institutions

Almost all (86%) of the postsecondary institutions identified in 2007 were private institutions, with only 14% public institutions.



In 2005, the same proportion (86%) of the postsecondary institutions in competition with Camosun College was private providers.

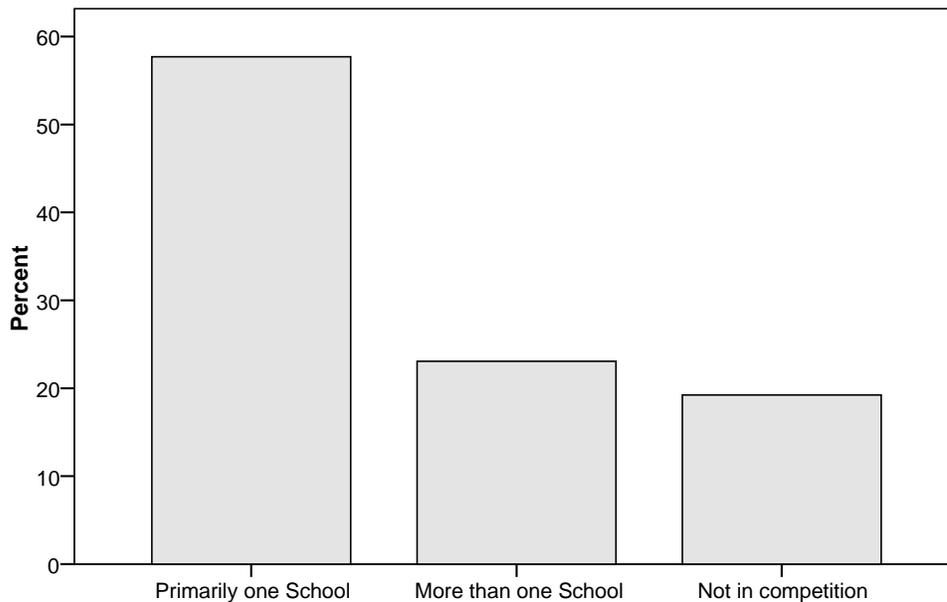
Extent of Competition

In 2007, almost sixty percent (58%) of the currently operating postsecondary institutions in the Victoria educational market had programs primarily offered by one Camosun College school. For example, English language schools primarily compete with the English Language Development programs in the School of Access. Most often, these postsecondary institutions have specialized in one or two programs from the whole array of Camosun College program offerings.

A quarter (23%) of postsecondary providers offered programming that was offered by more than one Camosun school. This group is discussed in the broad providers section of the report.

Nineteen percent (19%) of the postsecondary institutions in the Victoria educational market were not in competition with Camosun College, typically offering programming different from Camosun's programming⁹.

Extent of competition



⁹ Postsecondary institutions offering programs not in competition with Camosun College were: BC School of Art Therapy, Canadian Acupressure College, Canadian College of Acupuncture/Oriental Medicine, Dominion Herbal College, Dr. Vodder School - North America, Fine Education Academy Ltd, International College of Traditional Chinese Medicine, Okanagan Valley College of Massage Therapy Ltd, Oshio College of Acupuncture and Herbology, Screen Actors Studio, Spotlight Academy for Actors and Models, St. John's Ambulance, Victoria Motion Picture School Ltd, Volunteer Victoria, and Windsong School of Healing Ltd.

In 2005, about half (51%) of the postsecondary training providers were competing primarily with only one of Camosun's schools, 27% had broader programming and were in competition with more than one school, and 22% were not in competition with Camosun programming.

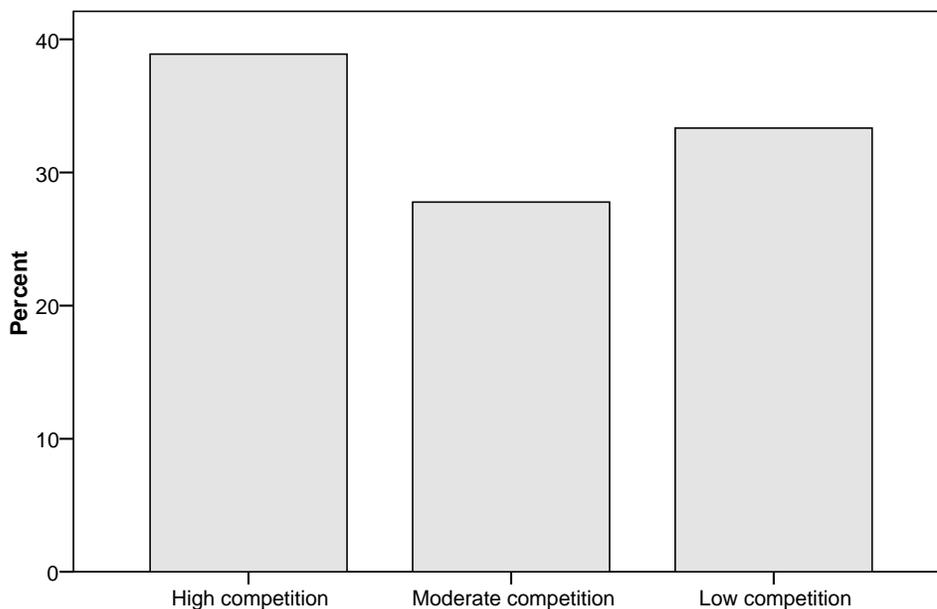
More than One School

About a quarter (23%) of the postsecondary institutions in the Victoria educational market were challenging Camosun on a broad level in 2007, offering courses and programs across more than one school.

Of the broad providers, about sixty percent (61%) were located in Greater Victoria, 6% were elsewhere on Vancouver Island, 22% were in the Lower Mainland, and 11% are elsewhere in BC or beyond. About sixty percent (61%) were private institutions.

Each institution was classified according to three levels of competition (high, moderate, low). The level of competition takes into account the breadth of programming offered by the institution, the degree of similarity of the programs, the proximity or availability of the programming to the Victoria educational market, and survey information from Camosun surveys. On this basis, 39% of the broad providers were in high competition with Camosun College, 28% were in moderate competition, and 33% were in low competition with Camosun College.

Broad Providers Level of Competition



High Competition

Almost forty percent (39%) of the broad providers were rated as in high competition with Camosun College. Each of these will be treated separately because of their importance. Many of these institutions and many of their programs compete head-to-head with Camosun programs, sometimes with the same name and the same qualification offered.

The high competition broad institutions were: the University of Victoria, Sprott-Shaw Community College, TRU-Open Learning, Malaspina University College, Royal Roads University, CDI College of Business and Technology, and Academy of Learning.

University of Victoria

A plethora of data sources suggest that the University of Victoria is a significant competitor for Camosun College. The University of Victoria was considered in the decision-making of 61% of current Camosun students who had considered other institutions prior to deciding to attend Camosun College¹⁰. About one in five (18%) of Camosun's Continuing Education students who reported taking a course from another CE provider in the last year had done so with the University of Victoria Continuing Studies division, the highest level for all alternative providers¹¹. The 2005 applicant study showed that of the Camosun College applicants who applied to more than one postsecondary institution, the University of Victoria was the most frequently mentioned (28%) alternative institution¹².

The number of applications to the University of Victoria each fall has remained fairly constant in the last five years, hovering around 12,000 applications¹³. The number of applicants admitted to UVic, however, has increased from just below 6,000 in Fall 2002 to over 8,000 in Fall 2006. On a percentage basis, 48% of applicants were admitted in Fall 2002, while 73% of applicants were admitted in Fall 2006.

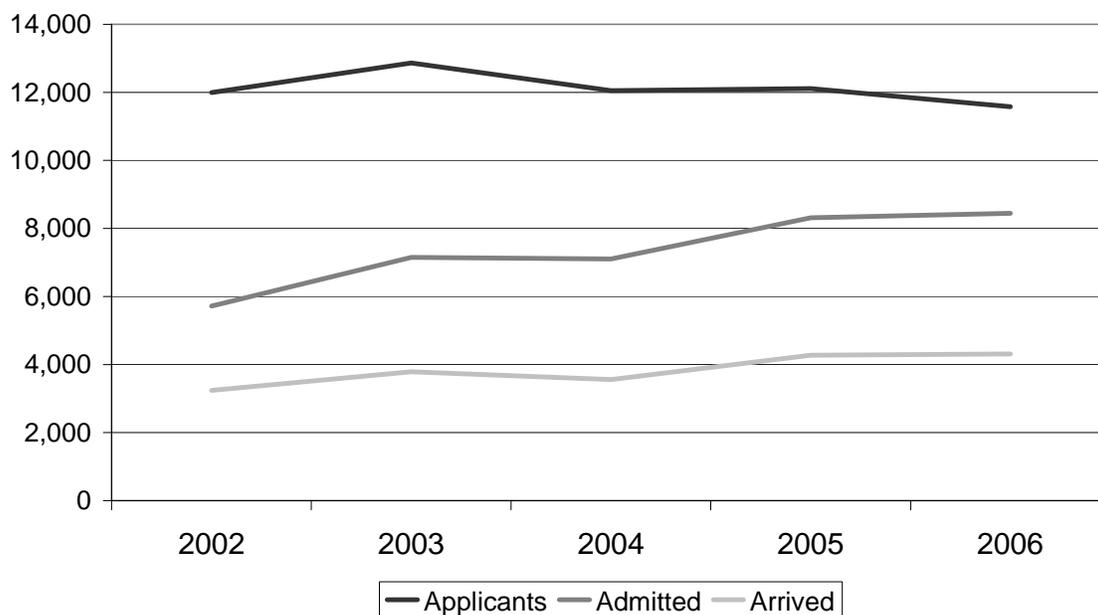
¹⁰ Student Profile Project overall report, Education Research and Development, internal report, October 2006, <http://erd.disted.camosun.bc.ca/docs/erp/StudentProfileProjectSurveyResults.pdf>.

¹¹ Continuing Education Survey 2006, Educational Research and Planning, internal report, February 2007.

¹² The University of Victoria accounted for more than a quarter (28%) of all responses for other institutions that Camosun applicants had also applied to (Applicant Survey Results, Educational Research and Planning, internal report, April 2005).

¹³ Applicant Behaviour and Admission/Arrival Patterns, Fall 2002 to Fall 2006, University of Victoria, Institutional Planning and Analysis, <http://www.inst.uvic.ca/applicant.html>.

UVic Applicants, Admitted, and Arriving Students Fall 2002 to Fall 2006



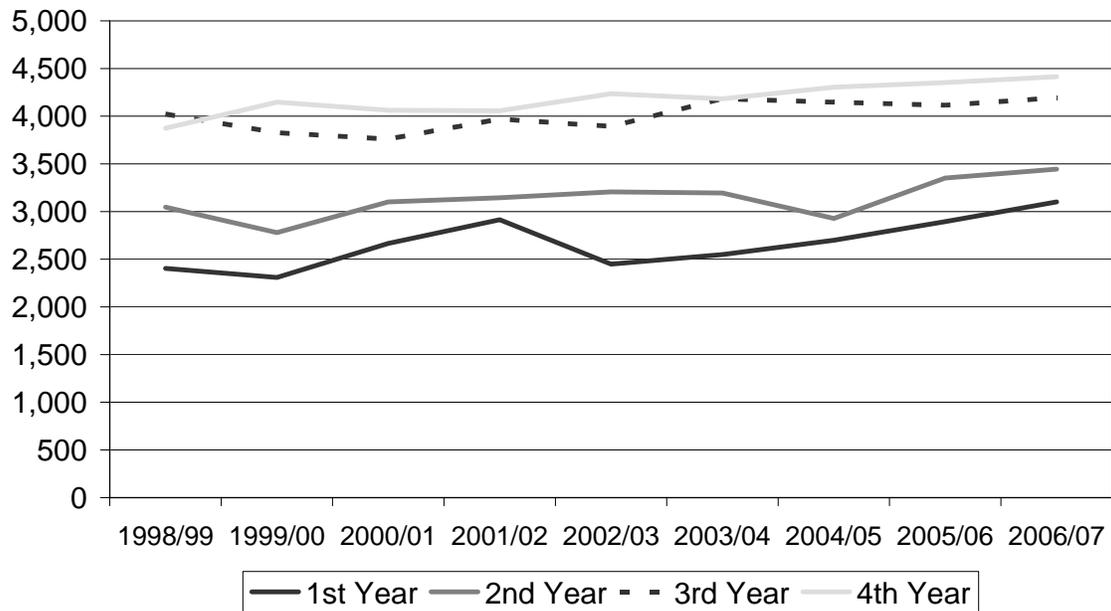
University of Victoria enrolments by year¹⁴ show that third and fourth year enrolments have been fairly flat in recent years, hovering around 4,000 enrolments between 1998/99 and 2003/04. Small increases in the most recent years have put both third and fourth year enrolments consistently over the 4,000 headcount. Similarly, second-year enrolments have fluctuated around 3,000 students per year, with a noticeable increase in the last two years, taking the number of second year UVic students to 3,445.

First-year enrolments at the University of Victoria¹⁵, however, have shown steady growth from 2002/03 through to 2006/07, with increases ranging between 4% and 7% and an average growth rate of 6% over the last four years. The largest growth in enrolments at the University of Victoria has been in first-year enrolments.

¹⁴ See Table 11C, Undergraduate Student Headcount by Year, UVic Factbook, 2006/07, http://www.inst.uvic.ca/factbook/fb_table10.xls

¹⁵ See Table 10, Undergraduate Student Headcount by Year Level, UVic Factbook, http://www.inst.uvic.ca/factbook/fb_table10.xls.

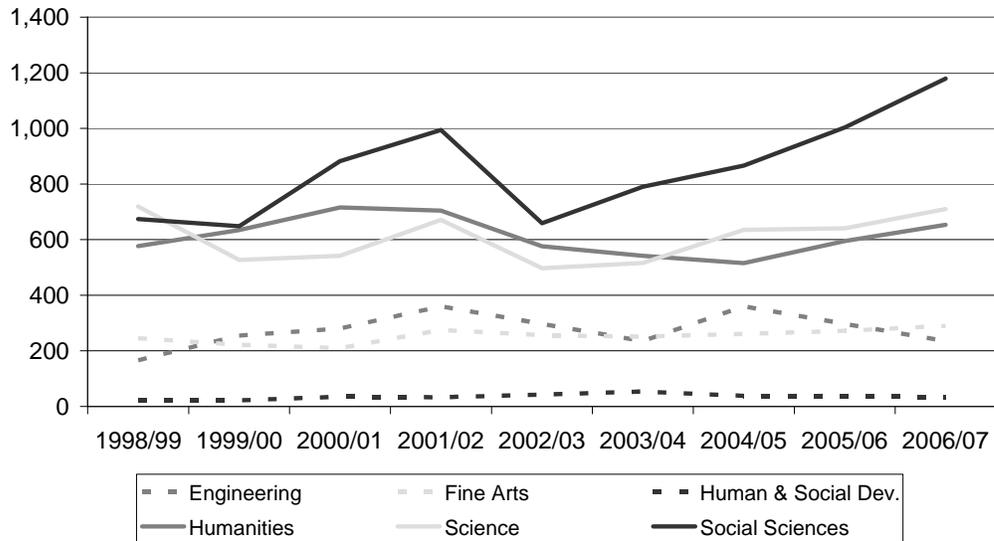
UVic Enrolments by Year of Study 1998/99 to 2006/07



Looking more closely at first-year enrolments at the University of Victoria reveals that the recent growth in first year enrolments has occurred primarily in the Social Sciences faculty. From the low point in 2002/03 to the current 2006/07 results, growth has ranged from 9% to 15% per year with an average growth of 13% over the last four years.

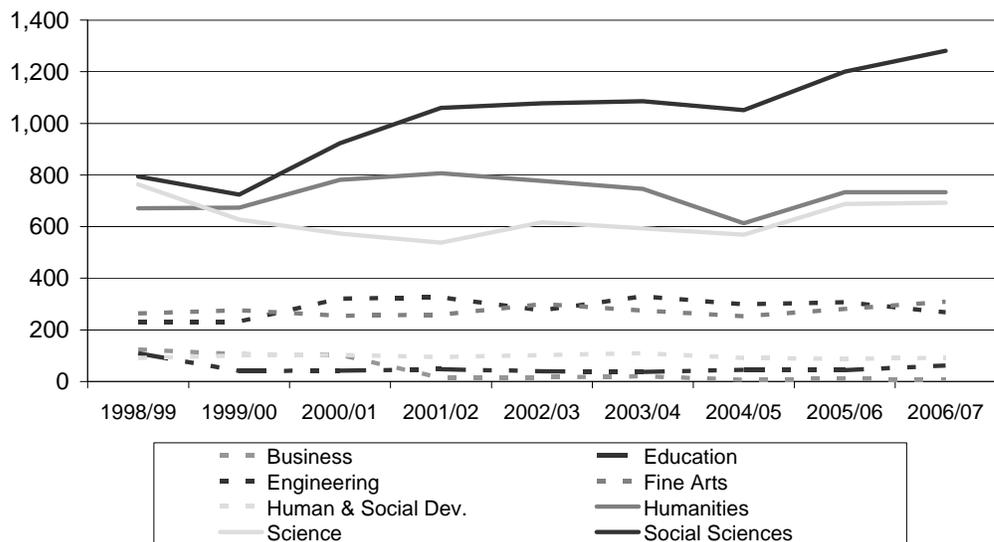
Less dramatic growth in first-year numbers has been experienced by the Science and Humanities faculties, with 2006/07 enrolments regaining the levels attained in 2001/02. First-year enrolments in the other faculties (Engineering, Fine Arts, and Human and Social Development) have remained fairly flat from 1998/99 to 2006/07.

First Year UVic Enrolments by Faculty 1989/99 to 2006/07



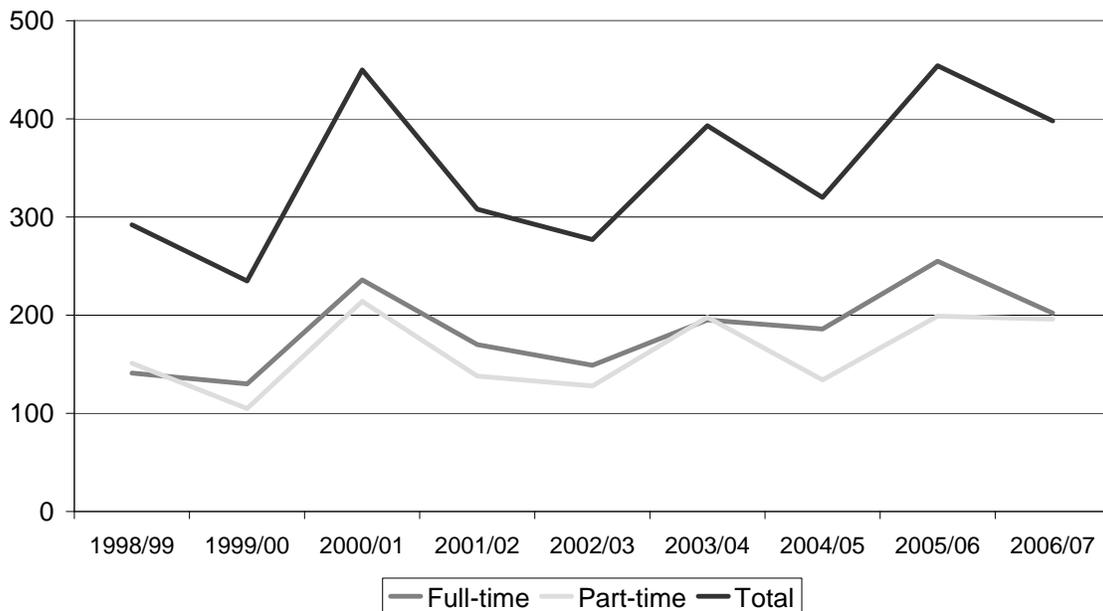
Second-year University of Victoria enrolments by faculty were very similar to the first-year results, with growth in the last two years primarily driven by increases in Social Sciences enrolments. Modest increases have been made by the Humanities and Science faculties in the last two years but none of the other faculties (Business, Education, Engineering, Fine Arts, and Human and Social Development) have experienced significant change in enrolments in the last nine years.

Second Year UVic Enrolments by Faculty 1989/99 to 2006/07



According to the University of Victoria fact book¹⁶, a large contingent of first-time undergraduates had previously attended Camosun College. In 2006/07, 398 first-time undergraduate students gave Camosun College as the institution they had previously attended. The Camosun group represented 42% of all first-time undergraduate students at UVic from BC colleges¹⁷. Including all other BC postsecondary institutions such as universities, the Camosun group still accounted for 33% of the first-time undergraduate students at UVic. At the total level, including students from across Canada and around the world, Camosun students accounted for 16% of all first-time undergraduates at the University of Victoria for the 2006/07 winter session who had previously attended another postsecondary institution.

First-time Undergraduates at UVic from Camosun 1998/99 to 2006/07



Interestingly, over the last nine years, about half of the Camosun group studied full-time at the University of Victoria, while half studied on a part-time basis. In 2006/07, 51% of former Camosun students studied full-time at the University of Victoria and 49% studied on a part-time basis.

Anecdotal evidence suggests that some students plan their program across institutions, deliberately including both Camosun and UVic courses, taking

¹⁶ See Table 11C, Undergraduate First-Time Headcount by Previous Institution, UVic Factbook, 2006/07, http://www.inst.uvic.ca/factbook/fb_table11.xls.

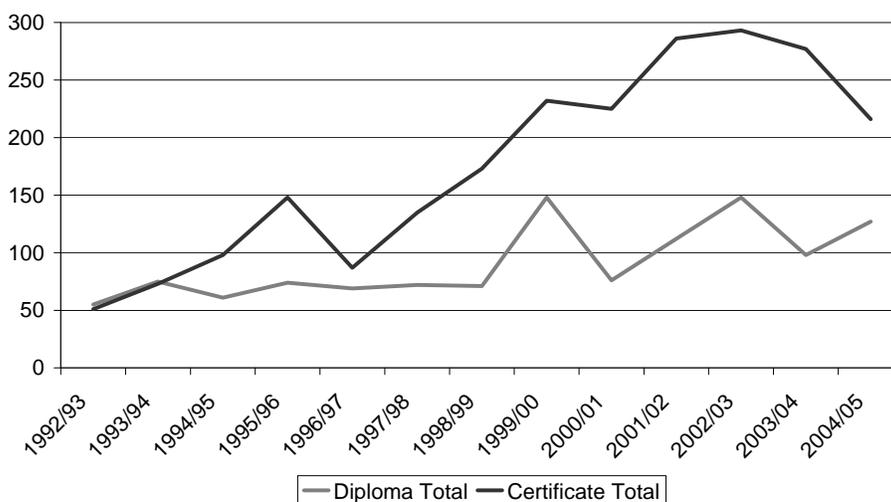
¹⁷ The next largest group had previously attended Malaspina University College and accounted for 11% of the new UVic students who had previously attended a BC college.

scheduling, instructor, and cost factors into account on a course by course basis. This has led to speculation about the extent of co-registration of students at the University of Victoria and concurrently at Camosun College. While it is not possible to establish if the part-time students attending the University of Victoria are continuing to take Camosun courses or if they are pursuing solely part-time study at UVic, this data shows that a large group of co-registrants is possible.

Another important source of competition from the University of Victoria is their Continuing Studies Division. Its certificate and diploma programs provide direct competition for some of Camosun’s certificates and diplomas. UVic Continuing Studies offers certificates and diplomas in Business Administration, a certificate in Financial Planning, a certificate in Public Management, and a certificate in Computer Based Information Systems.

The graph below shows the growth in the number of diplomas and certificates awarded by the University of Victoria over the last thirteen years¹⁸. The number of certificates awarded has risen from a low of 51 in 1992/93 to a peak of almost three hundred (293) in 2002/03. The most recent data available shows a decline compared with the 2002/03 series high but a large increase over the 1992/93 level. Most of the growth in diplomas and certificates awarded by the University of Victoria can be attributed to Business Administration awards. The Business Administration certificate was first awarded in 1993/94 and the Business Administration diploma was first awarded in 1996/97. Together these two awards account for 48% of the 2004/05 credentials awarded.

**UVic Diplomas and Certificates Awarded
1992/93 to 2004/05**



¹⁸ Most (85%) of the diplomas and certificates are awarded by the Division of Continuing Education, however, a small proportion are awarded by other faculties.

The University of Victoria provides significant competition to Camosun College in multiple ways. Having a competitive selection process allows the University of Victoria to control the number of applicants admitted. In recent years, the number of first-year students has increased significantly with growth in the first-year numbers concentrated in the faculty of Social Sciences. A large proportion of the first-time undergraduates to the University of Victoria cite Camosun College as their previous institution, and about half of these students study on a part-time basis, suggesting at least the possibility of co-registration between the two institutions. Finally, the Continuing Studies Division of the University of Victoria issued four times as many certificates and twice as many diplomas in 2004/05 compared with 1992/93, primarily in the area of Business Administration. Clearly, the University of Victoria is the most important competitor for Camosun College.

Sprott-Shaw Community College

Sprott-Shaw Community College has been in operation since 1903 and in Victoria since 1913. It currently has 20 locations in British Columbia, 2 locations in Alberta, and 2 international locations, one in China and one in Jordan.

Sprott-Shaw Community College was considered in the decision-making of 6% of current Camosun students who had considered other institutions prior to deciding to attend Camosun College¹⁹. A very small group (2%) of Camosun Continuing Education students who reported taking a continuing education course from another CE provider in the last year had taken a course from Sprott-Shaw Community College²⁰.

Business

Sprott-Shaw offers an applied degree, the Bachelor of Business Administration, granted approval by the Ministry of Advanced Education in November 2004. In addition, Sprott-Shaw offers programs in Advanced Business Management, e-Commerce, Professional Business Management, International Trade, Marketing and Sales Essentials, and Tourism/Hospitality Management. These programs compete directly with Camosun's Business Administration diploma, Business Management certificate, and Hotel/Restaurant Management diploma.

Similar to Camosun's Applied Business Technology programs, Sprott-Shaw offers Legal Secretary, Medical Office Assistant, Administrative Assistant, Payroll Administrator, and Business Office Concepts programs, with most of these programs also available in an accelerated format.

¹⁹ Student Profile Project overall report, Education Research and Development, internal report, October 2006,

<http://erd.disted.camosun.bc.ca/docs/erp/StudentProfileProjectSurveyResults.pdf>.

²⁰ Continuing Education Survey 2006, Educational Research and Planning, internal report, February 2007.

Another feature of the Sprott-Shaw programming is the option of an enhanced program that grants students two diplomas for one course of study. Enhanced programs are available for Administrative Assistant/Legal Secretary, Administrative Assistant/Medical Office Assistant, and Business Administration/Resident Care Attendant.

Health

The Health faculty of Sprott-Shaw offers Practical Nursing, Practical Nursing Access, Pharmacy Technician, Community Support Worker (Assisted Living or Social Services), Early Childhood Education, Recreational Activity Assistant, and Resident Care Attendant. As well, Sprott-Shaw offers an accelerated program for Pharmacy Technician. Camosun also offers all of these programs.

Trades

In the Trades area, Sprott-Shaw offers the Residential Construction Framing Technician program. This competes directly with the same program offered by Camosun.

Digital Arts and Animation

The digital training provided by Sprott-Shaw includes digital media and digital animation. Camosun offers related programs but does not have the same emphasis. Camosun's Engineering Graphics Technician and certificate in AutoCAD Graphics are offered from a technology point of view, while the Web Design certificate is taught from a Business perspective, and the Visual Arts diploma covers animation and film making in the context of art.

Thompson Rivers University - Open Learning

Thompson Rivers University - Open Learning (TRU-OL) offers over 400 online courses. There are six program groupings of TRU-OL, all of which provide programming parallel to Camosun's.

Adult Basic Education

The adult basic education programming available at TRU-OL includes intermediate, advanced and BC Graduation Diploma courses. All of these programs are offered by Camosun's ABE program.

Arts and Science, and General Studies

Certificates, diplomas, associate degrees, and degrees in Arts, Design and Fine Art, General Studies, Music, and Science are available through TRU-OL. These programs compete directly with Camosun's Arts and Science programs. In addition, a certificate, diploma, and degree in general studies are also offered.

Business and Management Studies

TRU-OL offers 4 certificates, 2 diplomas, 11 degrees, and 2 post-degree credentials in business and management studies. The program offerings in this area are either parallel to or extend well beyond Camosun's current offerings.

Health and Human Services

The health and human services program offerings at TRU-OL include home support attendant, practical nurse access, practical nurse refresher, registered nurse refresher, transition to Canadian nursing, social service worker, bachelor of Health Science (specializations in physiotherapy, psychiatric nursing, and respiratory therapy), and post-degree certificate in child and youth mental health. All courses are web-based and clinical placements are arranged across the province.

Information Technology

The certificate, diploma and degree offered in information technology provide programming similar to the Computer System Technology certificate and diploma. The TRU-OL programming is augmented by a management component and degree level study is also offered.

Malaspina University College

Malaspina University College was considered in the decision-making of 24% of current Camosun students who had considered other institutions prior to deciding to attend Camosun College²¹. In addition, six percent (6%) of Camosun Continuing Education students who reported taking a continuing education course from another CE provider in the last year had taken a course from Malaspina University College²².

The main campus of Malaspina University College is located in Nanaimo, but regional campuses are located as far south as Cowichan Lake, and as far north as Powell River. Malaspina offers a comprehensive range of certificates, diplomas, and degrees. Malaspina's programming is divided into ten groupings, *all* of which compete with Camosun College's program offerings. These are: Business and Management, Career and Academic preparation, Fine and Performing Arts, First Nations, Health, Human Services, Technology, Trades and Applied Technology, and degree programs in seven areas.

Royal Roads University

Royal Roads University was considered in the decision-making of 12% of current Camosun students who had considered other institutions prior to deciding to attend Camosun College²³.

While much of Royal Roads University's main programming is directed at post-

²¹ Student Profile Project overall report, Education Research and Development, internal report, October 2006, <http://erd.disted.camosun.bc.ca/docs/erp/StudentProfileProjectSurveyResults.pdf>.

²² Continuing Education Survey 2006, Educational Research and Planning, internal report, February 2007.

²³ Student Profile Project overall report, Education Research and Development, internal report, October 2006.

graduate students, its Continuing Studies department has grown significantly and now offers over 200 courses, seminars, workshops, talks, walks, and events covering professional advancement, the arts, green learning, and personal enrichments. The expansion of continuing education programming represents increased competition for Camosun's CE offerings. A very small group (2%) of Camosun Continuing Education students who reported taking a continuing education course from another CE provider in the last year had taken a course from Royal Roads University²⁴.

CDI College of Business and Technology

CDI College has 6 campuses in BC with two campuses in Victoria. CDI has a total of 46 campuses across Canada. CDI College programming is divided into 3 schools: Business, Technology, and Health Care. Given the franchise nature of the CDI College and the number of campuses across Canada and BC, it would seem likely that the Victoria campuses would be able to expand their program offerings with little overhead or development costs.

A very small group (2%) of Camosun Continuing Education students who reported taking a continuing education course from another CE provider in the last year had taken a course from CDI College²⁵.

Academy of Learning

The Academy of Learning is a large private provider with 94 training centres in Canada (with 2 in Victoria), one in the US, and twelve others around the world. Their programming has six streams that compete with Camosun College programming. These are: accounting, information technology, business office administration, health, and web and graphic design²⁶. Each stream offers a variety of diplomas and certificates.

Moderate Competition

More than a quarter (28%) of the broad competitors provided moderate levels of competition to Camosun College. Sixty percent (60%) of these institutions were located in Greater Victoria, and sixty percent (60%) were private institutions.

The local postsecondary institutions offering a broad program at a moderate level of competition with Camosun College were: British Columbia Institute of Technology²⁷, Northstudio.com Inc., Pitman Community College, School District

²⁴ Continuing Education Survey 2006, Educational Research and Planning, internal report, February 2007.

²⁵ Continuing Education Survey 2006, Educational Research and Planning, internal report, February 2007.

²⁶ The Academy of Learning also offers programming in insurance and customer service but this programming is not in competition with any of Camosun's current programs.

²⁷ British Columbia Institute of Technology was considered in the decision-making of 16% of current Camosun students who had considered other institutions prior to deciding to attend

62 (Sooke) and the University of Phoenix.

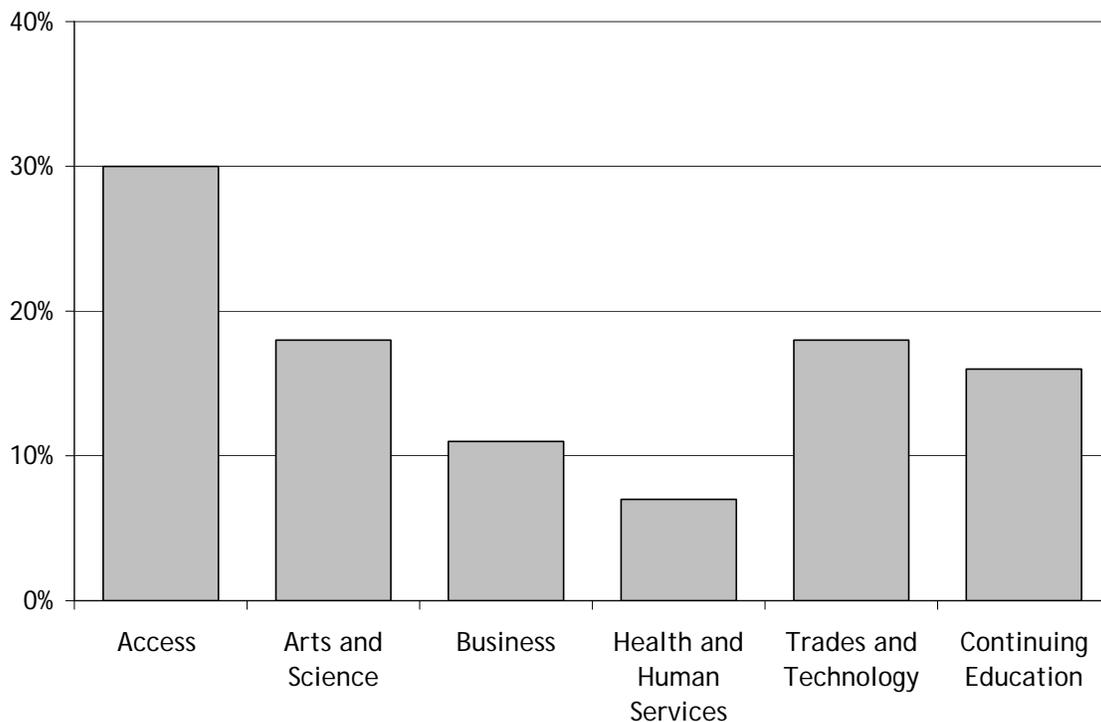
Low Competition

Finally, 33% of the broad providers were in low competition with Camosun programming. These institutions were almost all (83%) private, and half (50%) were located in Victoria.

Low competition broad providers included: Athabasca University, First Nations Training and Consulting Services, ICS Canada/Education Direct, Pacific Design Academy, Skillsoft, and Trinity Western University.

Primarily with One School

Of the postsecondary institutions providing competitive programming in only one area, or in a small number of programs contained within one of Camosun's schools, Access had the largest share of competitors (31%). Specialized providers were also in competition with Arts and Sciences (18%), Trades and Technology (18%), and Continuing Education (16%). There were fewer specialized providers solely competing with the Business (11%) and Health and Human Services (7%) programming.



Camosun College (Student Profile Project overall report, Education Research and Development, internal report, October 2006).

Access

The School of Access had the largest share of the specialized competitors in 2007 with 31% of the postsecondary institutions offering a program that competed primarily with Access programming. All (100%) of these institutions were located in Greater Victoria, and almost all (93%) were private providers. Most (79%) of the focussed Access competitors were English language schools. A rough gauge of the level of competition based on the similarity of the programming showed that 64% of the specialized providers were in moderate or high competition with Camosun's Access programming.

The postsecondary institutions offering programs that compete primarily with the School of Access were: Four Corners Language Institute Inc, Geos Language Academy Victoria, Global Village English Language Centers Ltd., Inlingua, King George International College, Mingus Language Services, Pacific Gateway International College, Pan Pacific International English College, School District 61 Continuing Education, South Island Distance Education School, Stewart College of Languages Inc, Victoria International Academy, and Victoria International Exchange Center.

Arts and Science

Almost twenty percent (18%) of the postsecondary providers that compete primarily with one Camosun school offered programs in the same area as the School of Arts and Science. Most (71%) of these institutions were located in Greater Victoria, and 71% were private providers. Most of the direct Arts and Sciences competitors were Fine Art educators. A rough gauge of the level of competition based on the similarity of the programming showed that only 38% of the specialized providers were in moderate or high competition with Camosun's Arts and Science programming.

The postsecondary institutions offering programs that compete primarily with the School of Arts and Sciences were: Canadian College of Performing Arts, Emily Carr Institute of Art & Design, Gulf Island Film & Television School, Justice Institute of BC, Vancouver Island School of Art, Victoria College of Art, and Western Academy of Photography.

Trades and Technology

The School of Trades and Technology had focussed competition from 18% of the private providers with specialized programs. All of these providers were private institutions, and half (50%) were located in greater Victoria. Most of the focussed Trades and Technology competitors were cooking schools, although a few providers offered programs in horticulture, nautical and technology. A rough gauge of the level of competition based on the similarity of the programming showed that only 38% of the specialized providers were in moderate or high competition with Camosun's Trades and Technology programming.

The local postsecondary institutions offering programs that compete primarily with the School of Trades and Technology were: Dubrulle International Culinary & Hotel Institute, Fine Art Bartending School, Joe the Bartender/Class Act Party Rentals Ltd., Le Cordon Bleu Paris Cooking School, Pacific Horticultural College, Pacific Institute of Culinary Arts, Pacific Institute of Power Engineering, and Quadrant Marine Institute.

Continuing Education

Sixteen percent (16%) of the specialized postsecondary providers in the Victoria education market offer programs that compete primarily with Camosun's Continuing Education programs. Most (71%) of these providers were located in the Greater Victoria area, and 86% were private institutions. The Continuing Education competitors were largely computer training institutions. A rough gauge of the level of competition based on the similarity of the programming showed that only 57% of the specialized providers were in moderate or high competition with Camosun's Continuing Education programming.

The local postsecondary institutions offering programs that compete primarily with Continuing Education were: Brookeline Internet, Clearway Computer Consultancy Training Ltd, New York Institute of Photography, On-Track Computer Training Ltd, Sector Learning Solutions, Shoreline Middle School, and W&C CBT Solutions Inc.

Business

Only a small cluster (11%) of the specialized private providers was primarily competing only with the School of Business. All (100%) of these postsecondary providers were private and 80% were located in greater Victoria. A rough gauge of the level of competition based on the similarity of the programming showed that only 40% of the specialized providers were in moderate or high competition with Camosun's Business programming.

The postsecondary institutions offering programs that compete primarily with the School of Business were: 24 Carrot Learning Inc, Institute of Conflict Analysis & Management (Diamond Consulting Inc), KG Computer Training, Polar Bear Corporate Education Solutions, and University Canada West.

Health and Human Services

Only seven percent (7%) postsecondary provider offered a program exclusively in competition with the School of Health and Human Services. All (100%) of these postsecondary providers were private and 67% were located in greater Victoria. A rough gauge of the level of competition based on the similarity of the programming showed that none (0%) of the specialized providers were in moderate or high competition with Camosun's Health and Human Services programming.

The postsecondary institutions offering programs that compete primarily with the School of Health and Human Services were: MTI Community College Ltd., Pacific Rim Early Childhood Institute Inc., and West Coast College of Massage Therapy.

Table 1 summarises the specialized providers that compete primarily with one program or a small number of programs from one Camosun school.

Table 1: Summary of Specialized Providers

In Competition With...	Number of Institutions	Private (%)	In Greater Victoria (%)	Moderate or High Level of Competition (%)
Access	13	92%	100%	69%
Arts and Sciences	8	71%	71%	38%
Trades and Technology	8	100%	50%	38%
Continuing Education	7	86%	71%	57%
Business	5	100%	80%	40%
Health and Human Services	3	100%	60%	0%

Appendix A: Educational Providers, Level of Competition and School

Educational Provider	Level of Competition	Access	AS	BUS	CE	HHS	TT
24 Carrot Learning Inc	Moderate			X			
Academy of Learning	High			X	X	X	X
Athabasca University	Low		X	X	X	X	X
BC School of Art Therapy	Not in Competition						
British Columbia Institute of Technology	Moderate						X
Brookline Internet	Not in Competition						
Canadian Acupressure College	Not in Competition						
Canadian College of Acupuncture/Oriental Medicine	Not in Competition						
Canadian College of Performing Arts	Low		X				
CDI College of Business & Technology	High			X	X	X	X
City University	Not in Competition						
Clearway Computer Consultancy Training Ltd	Moderate				X		
Dominion Herbal College	Not in Competition						
Dr Vodder School - North America	Not in Competition						
Dubulle International Culinary & Hotel Institute	Moderate						X
Emily Carr Institute of Art & Design	Moderate		X				
Fine Art Bartending School	Low						X
Fine Education Academy Ltd	Not in Competition						
First Nations Training & Consulting Services	Low	X					
Four Corners Language Institute Inc	Moderate	X					
Geos Language Academy Victoria	Moderate	X					
Global Village English Language Centers Ltd.	Low	X					
Gulf Island Film & Television School	Low		X				
ICS Canada/Education Direct	Low			X	X	X	X
Inlingua	High	X					
Institute of Conflict Analysis & Management (Diamond Consulting Inc)	Low			X			
International College of Traditional Chinese Medic	Not in Competition						
Joe the Bartender/Class Act Party Rentals Ltd.	Low						X
Justice Institute of BC	Not in Competition						
KG Computer Training	Low			X			
King George International College	Moderate	X					
Le Cordon Bleu Paris Cooking School	Low						X
Malaspina University College	High	X	X	X	X	X	X
Mingus Language Services	Moderate	X					
MTI Community College Ltd.	Low					X	

Educational Provider	Level of Competition	Access	AS	BUS	CE	HHS	TT
New York Institute of Photography	Low				X		
Northstudio.com Inc	Moderate				X		X
Okanagan Valley College of Massage Therapy Ltd	Not in Competition						
On-Track Computer Training Ltd	Not in Competition						
Oshio College of Acupuncture & Herbology	Not in Competition						
Pacific Design Academy	Low		X				
Pacific Gateway International College	Moderate	X					
Pacific Horticultural College	Moderate						X
Pacific Institute of Culinary Arts	Low						X
Pacific Institute of Power Engineering	Low						X
Pacific Rim Early Childhood Institute Inc.	Low					X	
Pan Pacific International English College	Moderate	X					
Pitman Community College	Moderate			X		X	
Polar Bear Corporate Education Solutions	Low			X			
Quadrant Marine Institute	Moderate						X
Royal Roads University	High				X		
School District 61 (Victoria) Continuing Education	Low	X					
School District 62 (Sooke)	Moderate			X	X		
Screen Actors Studio	Not in Competition						
Sector Learning Solutions	Moderate				X		
Shoreline Middle School	Moderate				X		
SkillSoft	Low			X			
South Island Distance Education School	Not in Competition						
Spotlight Academy for Actors & Models	Not in Competition						
Sprott-Shaw Community College	High			X	X	X	X
St. John Ambulance	Not in Competition						
Stewart College of Languages Inc	High	X					
Trinity Western University	Low		X				
TRU - Open Learning	High	X	X	X		X	X
University Canada West	Moderate			X			
University of Phoenix	Moderate			X		X	
University of Victoria	High		X	X	X	X	X
Vancouver Island School of Art	Moderate		X				
Victoria College of Art	Moderate		X				
Victoria International Academy	High	X					

Educational Provider	Level of Competition	Access	AS	BUS	CE	HHS	TT
Victoria International Exchange Center	Low	X					
Victoria Motion Picture School Ltd.	Not in Competition						
Volunteer Victoria (United Way)	Not in Competition						
W&C CBT Solutions Inc	Moderate				X		
West Coast College of Massage Therapy	Not in Competition						
Western Academy of Photography	Low		X				
Windsong School of Healing Ltd	Not in Competition						