

**Competitive Analysis  
Camosun College  
Strategic Plan 2006**

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April 2005**

# **Camosun Educational Market Analysis**

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# Camosun Educational Market Analysis

## 1. General Characteristics of the Camosun Educational Market

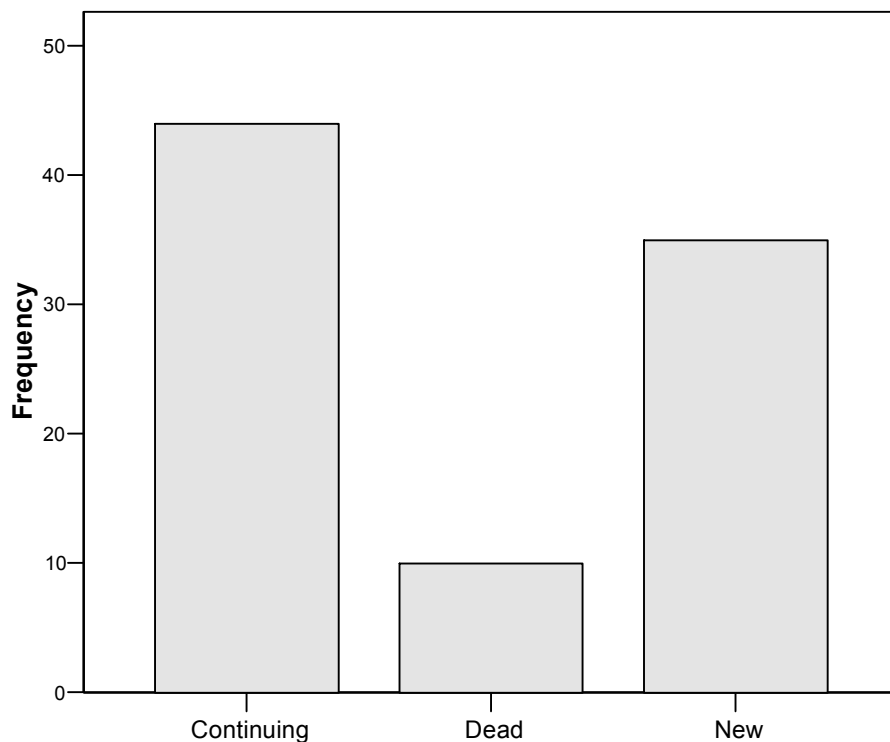
### Number of Institutions

In April 2005, 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 considered to have some presence in the Victoria education market and was included in the study.

Of the 89 institutions identified in 2005, 44 institutions had previously been identified in the 2001 competitive analysis, 35 new postsecondary institutions were identified, and 10 institutions from the 2001 analysis were no longer operating.

In the last four years, the increase in the number of postsecondary training providers has been significant. While the size of each institution and the programming offered by an institution are more important considerations in the competitive landscape, the sheer number of institutions is also a raw measure of the 2005 competitive environment.

**Number of Postsecondary Institutions in the Camosun Education Market 2005**



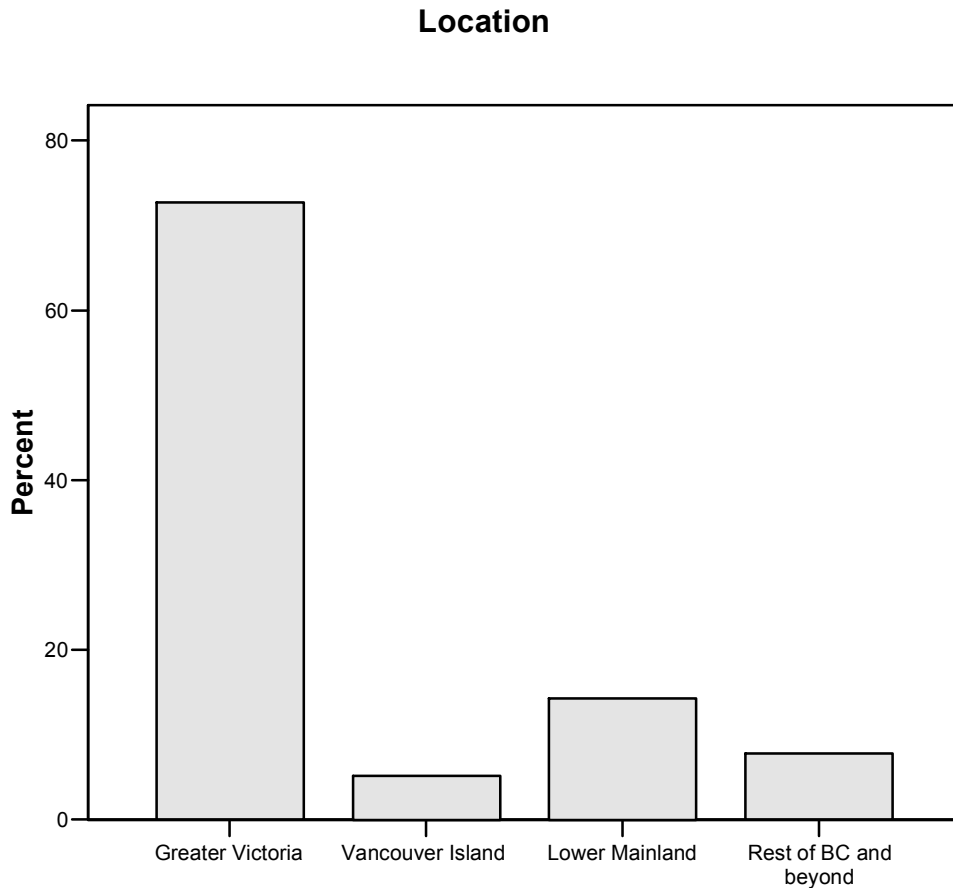
In 2001, a total of 54 postsecondary institutions were identified in the Victoria education market.

A small group of ten institutions that had been operating in 2001 were no longer active in 2005. All of these institutions were private institutions, 80% were located in Greater Victoria, and 80% had narrow programming similar to one of Camosun's program or a small number of programs offered within one of Camosun' schools.

The postsecondary institutions no longer operating in Victoria were: Ahead Institute of Technology Inc, Bonistar Training and Human Resource Management, Canadian Family Resource Institute, Canadian Pacific College International Ltd, City University, CompuCollege (merged with Polar Bear Corporate Education Solutions), CTI Counselor Training Institute of Canada, KG Computer Training, Melcomp Technical Institute, and P B S C Computer Training Centre (now part of Polar Bear Corporate Education Solutions).

### Location of Institutions

In 2005, 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 but not in Victoria, 14% were located in the Lower Mainland, and 8% were located either elsewhere in BC or even further away (Alberta, Ontario).



In 2001, the distribution was very similar with 70% located in Greater Victoria, 6% on Vancouver Island, 19% in the Lower Mainland, and 6% either in the rest of BC or beyond.

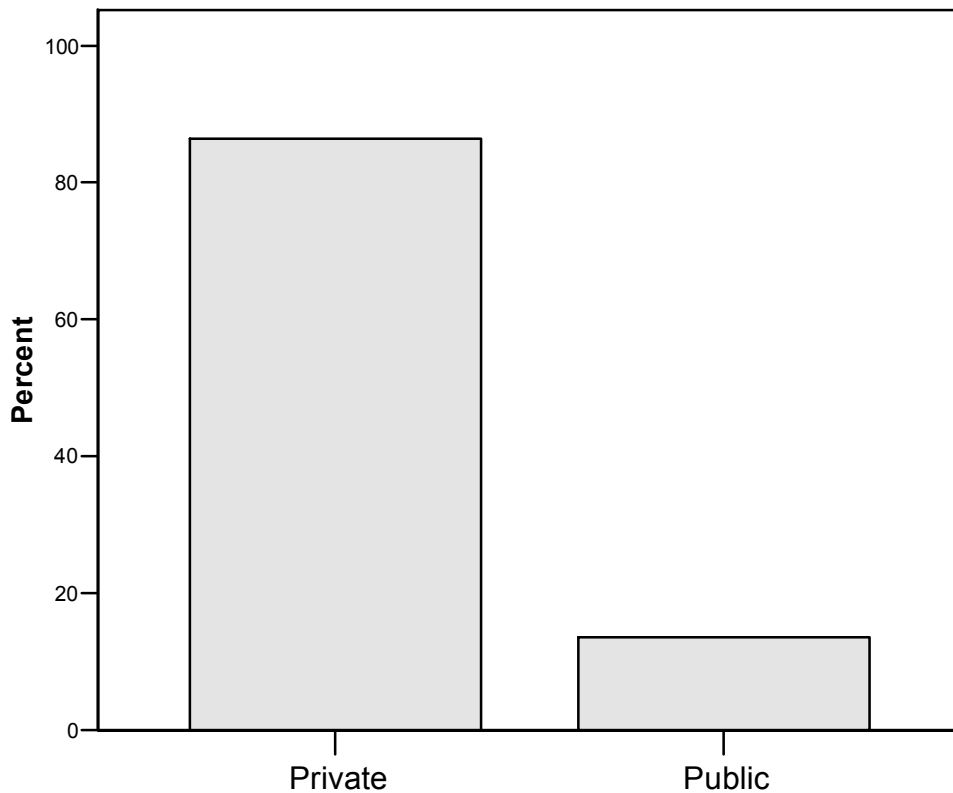
### Public or Private?

Almost all (86%) of the postsecondary institutions identified in 2005 were private institutions, with only 14% recognized as public institutions.

The local public institutions competing in the Camosun market were: Royal Roads University, School District 61 (Victoria) Continuing Education, School District 62 (Sooke), Shoreline Middle School, and the University of Victoria.

Public institutions that compete in the Camosun education market but do not have a campus located in Victoria were: Athabasca University, British Columbia Institute of Technology, Emily Carr Institute of Art and Design, the Justice Institute of BC, Malaspina University College, and Thompson Rivers University – Open Learning.

### Public or Private?



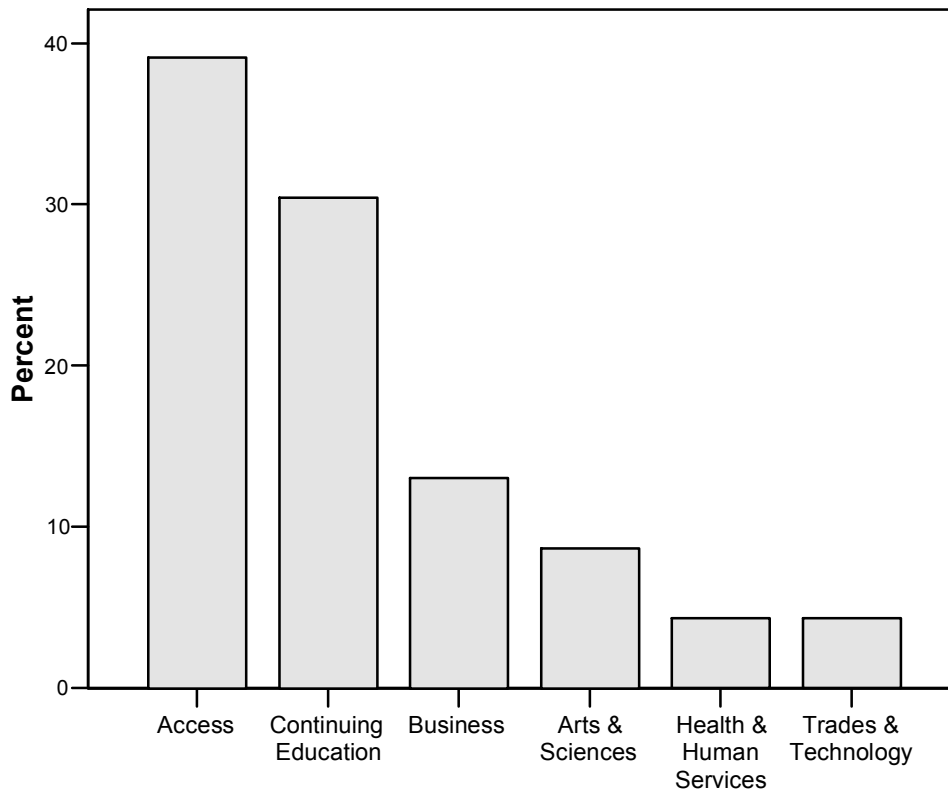
In 2001, most (82%) of the postsecondary institutions in competition with Camosun College were also private providers.

## New Institutions

The postsecondary institutions new to the Victoria educational market in 2005 were almost all (97%) private institutions and most (79%) were located in Victoria.

Most (70%) of the newcomers were specialised providers, competing primarily with one program or a small number of Camosun programs from one school. Of the new institutions competing with just one Camosun school, the School of Access had the highest proportion (39%) of new competitors, followed by Continuing Education (30%). Only 13% of the new institutions had specialised programming in competition with the School of Business; the School of Arts and Sciences had a smaller proportion (9%) and the School of Health and Human Services (4%) and Trades and Technology (4%) had the lowest proportion of new institutions offering specialised programming in their area.

**New Competitors in Competition with which School?**



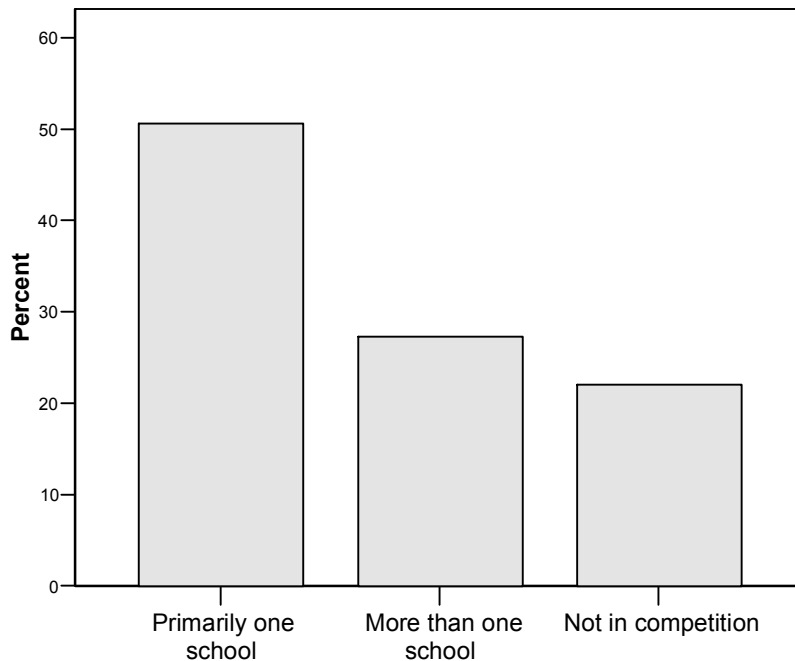
## 2. Extent of Competition

In 2005, half (51%) of the postsecondary institutions in the Victoria educational market were offering programs that were primarily offered in one school at Camosun College. For example, English language schools primarily compete with the English Language Development programs in the School of Access. Another example would be a cooking school which would largely provide competition for the Culinary Arts program in the School of Trades and Technology. Most often, these postsecondary institutions have specialized in one or two programs or types of programs from the whole array of Camosun College's program offerings.

A significant group (27%) of postsecondary providers offered programming that included programs that were offered by more than one Camosun school. This group is discussed in the broad providers section of the report.

About one in five (22%) of the postsecondary institutions in the Victoria educational market were not in competition with Camosun College, typically offering programming different from Camosun's programming. For example, the Canadian Acupressure College or the West Coast College of Massage Therapy offer programming that is not available in any Camosun School.

Extent of Competition



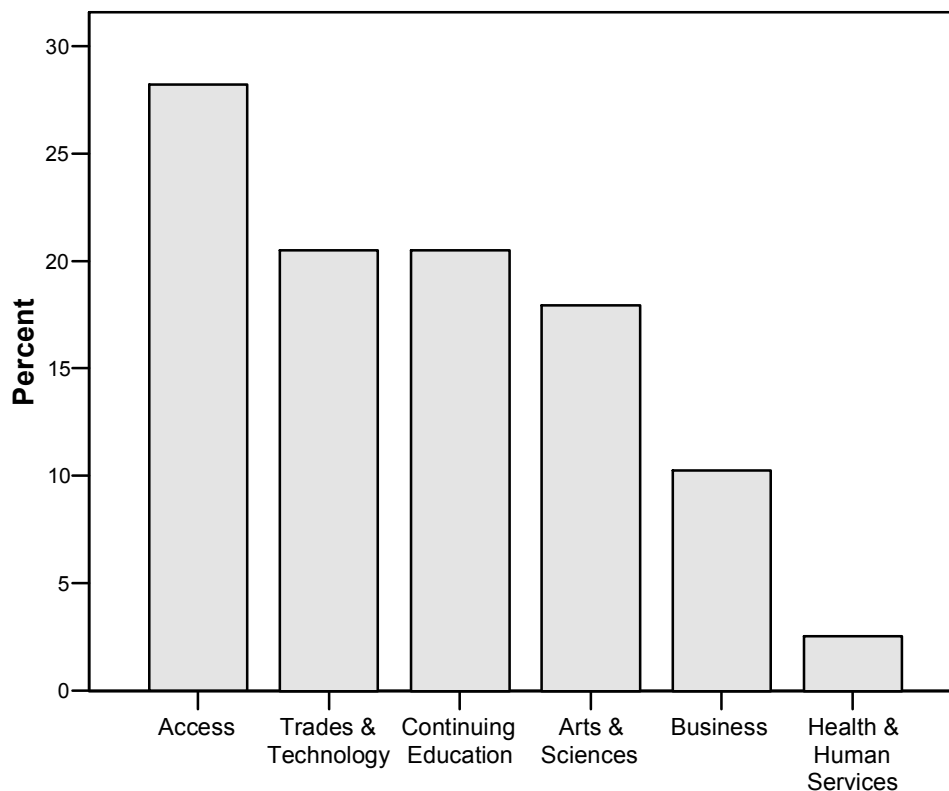
In 2001, less than half (44%) of the postsecondary training providers were competing primarily with only one of Camosun's schools, 28% had broader programming and were in competition with more than one school, and 28% were not in competition with Camosun programming.



### a) Specialized Providers

Specialized postsecondary training providers are institutions that provide programming in only one area, or a small number of programs contained within one of Camosun's schools. These institutions are discussed below, grouped by the Camosun school with which they compete. The School of Access had the most competitors (28%) that were specialized providers, followed by Trades and Technology (21%), and Continuing Education (21%), and then Arts and Sciences (18%). There were fewer specialized providers solely competing with the School of Business (10%) and the School of Health and Human Services (3%).

**In competition with which School?**



#### *Access*

The School of Access had the largest share of the direct competitors in 2005 with 28% of the postsecondary institutions offering a program that competed primarily with Access programming. All of these institutions were located in Greater Victoria, all were private providers, and almost all (82%) were new to the Victoria educational market (identified for the first time in 2005). Most of the focussed Access competitors were English language schools.

The postsecondary institutions offering programs that compete primarily with the School of Access were: Fine Education Academy Ltd, Four Corners Language Institute Inc, Geos Language Academy Victoria, Global Teach English Overseas College, Inlingua, Pacific Learning Connection, Pan Pacific International College, Shane Global Village English Centres, South Island Distance Education School, Stewart College of Languages Inc, and Victoria International Academy.

### *Trades and Technology*

The School of Trades and Technology had focussed competition from 21% of the private providers with specialized programs. All of these providers were private institutions, most (88%) were institutions that had been in the Victoria education market at least since 2001, and less than half (38%) 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.

The local postsecondary institutions offering programs that compete primarily with the School of Trades and Technology were: Joe the Bartender Bartending School of Excellence, Pacific Horticulture College, and Quadrant Marine Institute.

Postsecondary institutions that compete primarily with Camosun Trades and Technology programming but do not have a campus located in Victoria were: Dubrulle Culinary Arts, Fine Art Bartending School, iTi Information Technology Institute, Le Cordon Bleu Paris Cooking School (Ottawa), and the Pacific Institute of Culinary Arts.<sup>1</sup>

### *Continuing Education*

Twenty percent (18%) of the specialized postsecondary providers in the Victoria education market offer programs that compete primarily with Camosun's Continuing Education programs. Most (88%) of these providers were located in the Greater Victoria area, 88% were new institutions, establishing themselves in Victoria since 2001, and 88% were private institutions. The Continuing Education competitors were largely computer training institutions.

The local postsecondary institutions offering programs that compete primarily with Continuing Education were: Applied Technology Training, Brookeline Internet, Clearway Computer Consultancy Training Ltd, Priority 1 Computer Service, Sector Computer and Business School, Shoreline Middle School, and The Writing School. Only On-Track Computer Training Ltd does not have a campus located in Victoria.

### *Arts and Sciences*

Twenty percent (21%) of the postsecondary providers that compete primarily with one Camosun school offered programs in the same area as the School of Arts

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<sup>1</sup> Both Dubrulle Culinary Arts and iTi Information Technology are part of The Art Institute of Vancouver.

and Sciences. Most (71%) of these institutions were located in Greater Victoria, 71% were institutions that were continuing (had been included in the 2001 analysis), and 71% were private providers. Most of the direct Arts and Sciences competitors were Fine Art educators.

The local postsecondary institutions offering programs that compete primarily with the School of Arts and Sciences were: Canadian College for Chinese Studies, Canadian College of Performing Arts, Victoria College of Art, and Western Academy of Photography.<sup>2</sup>

Postsecondary institutions that compete primarily with Camosun Arts and Sciences programming but do not have a campus located in Victoria were: Emily Carr Institute of Art and Design, Gulf Island Film and Television School, the Justice Institute of British Columbia.

### *Business*

Only a small cluster (10%) of the specialized private providers was primarily competing only with the School of Business. All of these postsecondary providers were located in Greater Victoria, all of them were private providers, and most (75%) were new institutions, not part the 2001 analysis.

The postsecondary institutions offering programs that compete primarily with the School of Business were: Institute of Conflict Analysis and Management, Polar Bear Corporate Education Solutions, University Canada West, and W&C CBT Solutions Inc.

### *Health and Human Services*

Only one (3%) postsecondary provider offered a program exclusively in competition with the School of Health and Human Services. This provider was a new private provider in Greater Victoria, offering qualifications in early childhood education. The postsecondary institution offering a program that competes primarily with the School of Health and Human Services was Pacific Rim Early Childhood Institute Inc.

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

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<sup>2</sup> For the purpose of this analysis, the Victoria Conservatory of Music is considered part of Camosun College.

**Table 1: Summary of Specialized Providers**

<b>In Competition With...</b>	<b>Number of Competitors</b>	<b>Percent Private</b>	<b>Percent in Greater Victoria</b>	<b>Percent New</b>
Access	11	100%	100%	82%
Trades and Technology	8	100%	38%	12%
Continuing Education	8	88%	88%	88%
Arts and Sciences	7	71%	71%	29%
Business	4	100%	100%	75%
Health and Human Services	1	100%	100%	100%

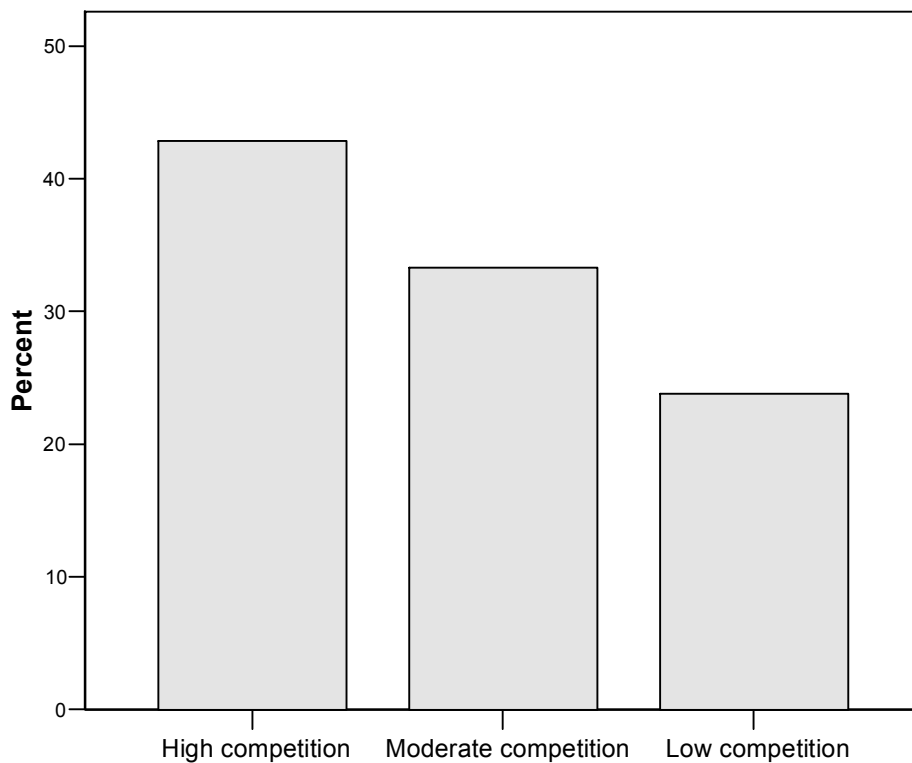
### b) Broad Providers

In 2005, almost thirty percent (29%) of the postsecondary institutions in the Victoria educational market were challenging Camosun on a broad level, offering courses and programs across more than one school. Four years earlier, the proportion was the same, with 30% having course offerings that included programs in more than one Camosun school.

Of the broad providers, most (71%) were continuing institutions, ones that have been in the Victoria educational market since at least 2001. About sixty percent (62%) were located in Greater Victoria, 5% were elsewhere on Vancouver Island, 24% were in the Lower Mainland, and 10% are elsewhere in BC or beyond. Sixty-two percent (62%) 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 and depth of programming offered by the institution, the degree of similarity of the programs, and the proximity or availability of the programming to the Victoria educational market. On this basis, 43% of the broad providers were in high competition with Camosun College, 33% were in moderate competition, and 24% were in low competition with Camosun College.

**Broad Providers Level of Competition**



## **High Competition**

Using this scale, 43% 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 with a local campus in Victoria were: the University of Victoria, Sprott-Shaw Community College, CDI College, Computer Master Institute of Technology, Academy of Learning, and Vancouver Career College.

Broad institutions that do not currently have a campus in Victoria but were significant competitors to Camosun College were: Malaspina University College, Thompson Rivers University – Open Learning, and the University of Phoenix - Vancouver.

## **University of Victoria**

The University of Victoria offers bachelor's degrees in business, education, engineering, fine arts, humanities, human and social development, law, science, social sciences, and interdisciplinary programs. Graduate degrees are offered in 39 different areas. Camosun competes with UVic to provide the first two years of many UVic programs through its university transfer, associate of arts degree, and associate of science programming.

500 new first and second year undergraduate seats have been announced for UVic's September 2005 intake, in an effort to reduce the entry level GPA to 75%. Since the GPA cut-off has hovered around 80% for the last five years, this is a significant drop in requirements. The new undergraduate spaces are to be in humanities, sciences, social sciences, computer science and engineering. Over the next five years a total of 1,900 undergraduate seats are planned for UVic. This additional capacity will have a significant impact on demand at Camosun and will be the subject of a separate detailed analysis soon to be provided.

Camosun sends a large contingent of arts and sciences transfer students to UVic each year. In 2004/5, 498 or 22% of the college applicants to the second and third year UVic programs were from Camosun College.

Another source of competition from UVic is their Continuing Studies Division. Its certificate and diploma programs provide direct competition for Camosun's certificates and diplomas. UVic 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. A number of other certificate and diploma programs are offered by the Continuing Studies Division but they relate to fields of study outside of Camosun's offerings

(such as Cultural Resource Management, Environmental and Occupational Health, French Language, Humanities, Intercultural Education and Training, and International Intellectual Property Law).

### **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 BC, with 5 campuses on Vancouver Island including Courtney, Campbell River, Duncan, Nanaimo and Victoria. It is difficult to tell from the Sprott-Shaw website which programs are offered at each location. The general program offerings are listed below.

a) The Health faculty offers Practical Nursing, Practical Nursing Access, Clinical Pharmacy Technician, Pharmacy Technician, Community Support Worker (Assisted Living, Social Services), Spa Therapy, Resident Care Attendant (Assisted Living), Medical Office Assistant, Recreational Activities Assistant, and Institutional Care Aide. Camosun offers all of these programs, except Spa Therapy and Recreational Activities Assistant. Because Sprott-Shaw has a campus in Victoria it is a significant competitor to Camosun's health programs.

New programs under development in the Health faculty at Sprott-Shaw include Health Unit Clerk and Hospital Unit Coordinator. As well, Sprott-Shaw offers accelerated programs for Clinical Pharmacy Technician, and Medical Office Assistant. A number of the health programs are also offered in the evening. These include: Resident Care Attendant (Assisted Living), Clinical Pharmacy Technician, and Institutional Care Aide. As well, enhanced programs that grant students two diplomas are available in Business Administration/Clinical Pharmacy Technician, and Business Administration/Resident Care Attendant, and Medical Office Assistant/Clinical Pharmacy Technician.

b) The Administrative faculty offers Legal Secretary, Administrative Assistant, Business Office Concepts, and Computer Business Skills/Business Administration. These programs compete directly with Camosun's applied business technology programs of Legal Office Assistant, Office Administration, Office Management diploma, Executive Assistant certificate, Virtual Assistant certificate and certificate in Business Management.

The Legal Secretary and Computer Business Skills programs are also available on an accelerated basis. As well, enhanced programs that grant students two diplomas are available in Administrative Assistant/Legal Secretary, and Administrative Assistant/Medical Office Assistant.

c) The Business faculty of Sprott-Shaw offers programs in Advanced Business Management and e-Commerce, Professional Business Management, International Trade and Business Management, e-Commerce, and Marketing and Sales Essentials. These programs compete directly with Camosun's Business Administration diploma, and Business Management certificate.

Sprott-Shaw also offers a new applied degree, the Bachelor of Business Administration, granted by the Ministry of Advanced Education in November 2004. This degree will compete to a certain extent with Camosun's applied Bachelor of Business Administration (Accounting Major).

Graduates from the Sprott-Shaw diploma programs can receive between 55 and 65 transfer credits to Athabasca University.

d) In the trades area, Sprott-Shaw offers the Residential Framing Technician program. This competes directly with the entry-level trades training in Carpentry offered by Camosun.

e) The Tourism and Hospitality faculty offers a diploma in Tourism/Hospitality Management and the related diploma in Tourism/Hospitality Management and Computer Applications. These programs are in competition with a number of programs offered by Camosun including: the diploma in Hotel and Restaurant Management, the certificate in Tourism and the certificate in Travel Counselling.

The Tourism/Hospitality program at Sprott-Shaw is also available on an accelerated basis

f) The Multimedia training provided by Sprott-Shaw covers three areas: Digital Media and Communication, Computer Graphics and Web Media, and Digital Animation. Camosun offers related programs to the multimedia programs offered by Sprott-Shaw but does not have the same emphasis. Camosun's Computer Graphics Technician (Engineering) and certificate in Auto CAD Graphics are offered from a technology point of view, 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.

### **CDI College**

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) The School of Business offers 5 programs in Victoria (Accounting and Payroll Administrator, Business Administration Advanced, Legal Administrative Assistant, Microcomputer Business Applications, and Microcomputer Business Applications – Accounting). These program offerings are in competition with the Business Administration diploma, Office Management diploma, Office Administration certificate, Legal Office Assistant certificate, the Automated Accounting certificate, the MS-Access Data Management certificate, the MS-



Office certificate, the Business Management certificate, and the Leadership Development certificate.

b) The School of Technology offers 5 programs in Victoria (Programmer Analyst - Web Developer, Programmer Analyst - Internet Solutions Developer, Network and Internet Support Specialist, Network Administrator, and Computer Programmer). The programs do not seem to offer a qualification of their own but instead prepare students to write various industry certification examinations. These program offerings are in competition with the Web Design certificate, Computer Systems Technology diploma, Network and Electronics Technician certificate, and Computer Engineering Technology diploma.

c) The School of Health Care offers 4 programs in Victoria (Medical Office Assistant, Personal Support Worker/Resident Care Aide, Pharmacy Technician, and Intra-Oral Level II Dental Assistant). These program offerings are in competition with the Medical Office Assistant certificate, Home Support/Resident Care Attendant certificate, Pharmacy Technician, and Certified Dental Assistant certificate.

### ***Computer Master Institute of Technology***

The Computer Master Institute of Technology specializes in new media which is a combination of technology and art. Computer Master programs are narrowly focussed, yet they cross the traditional school organisation of the Camosun College structure. The institute offers 4 diplomas (Game Design and Development, e-Business Technology, New Media Studies, Digital Animation and Effects) and 6 certificates (Foundations of Media Design, Interactive Multimedia Development, Foundations in Digital Animation, Web Applications Development, e-Commerce Site Development, and Advanced Digital Animation).

CMIT also offers the SWEET program which provides 30 hours of credit towards Grade 12 CAP requirements.

These program offerings do not directly compete with individual Camosun program offerings, instead, they cut across Visual Arts, Applied Communication, Web Design, Electronic Publishing, and Computer Systems Technology.

### ***Academy of Learning***

The Academy of Learning is a large private provider that provides training in all Canadian provinces and territories except Newfoundland, Nunavut and Yukon. They also have training centres in ten other countries around the world. Their programming is divided into seven streams. Each stream offers diploma, certificate, and skills upgrading courses. Not all programs are offered by the Victoria office, due to lack of demand. The courses range in price from \$295 to \$800 although no listing of the course costs is available on their website.

a) The Information Technology stream offers 3 diplomas (Computer Service Technician, PC Support Specialist, and Network Administrator), 10 different industry certifications, and skills upgrading in 14 different programming and software areas. These program offerings are in competition with the Technology programs offered by the School of Trades and Technology.

b) The Accounting stream offers 4 diplomas (Business and Office Accounting Clerk, Accounting Clerk, Computerized Accounting Assistant, and Payroll Supervisor), a certificate in Payroll Administrator, and skills upgrading in 6 different software areas. These program offerings are in competition with the Applied Business Technology programs, the business certificate programs, and the continuing education programs offered by the School of Business.

d) The Office Administration stream offers 12 diplomas (Administrative Assistant, Business Office Skills, Data Entry Operator, Desktop Publishing and Marketing Assistant, Executive Secretary, Microcomputer Business Applications, Microcomputer Software Support, Office Clerk, Wordprocessing Clerk, Administrative Secretary, Entrepreneurial Business Applications, and Office Administration), industry certification in Microsoft Office Specialist, and skills upgrading in 8 different areas. These program offerings are in competition with the Applied Business Technology programs, the business certificate programs, and the continuing education programs offered by the School of Business.

e) The Insurance stream offers a diploma in Insurance Advisor, and 4 skills upgrading courses related to the insurance industry. These program offerings are not in competition with any Camosun College offerings.

f) The Customer Service stream offers 2 diplomas (Call Centre Customer Representative, and Customer Service and Information Clerk), and 5 skills improvement courses. These program offerings are not in competition with any Camosun College offerings.

g) The Healthcare Services stream offers 4 diplomas (Medical Receptionist, Medical Office Assistant, Personal Support Worker, and Pharmacy Technician), 4 industry certifications (Certified Medical Assisting Professional, CMAP – Unit Clerk, CMAP – Advanced Medical Transcription, and CMAP – Dental Administration Assistant), and skills upgrading courses are provided for Unit Clerk, Advanced Medical Transcription, and Dental Administration Assistant programs. These program offerings are in competition with the Medical Office Assistant and Hospital Unit Clerk programs offered by the School of Business, the Home Support/Resident Care Attendant program offered by the School of Health and Human Services, and the Pharmacy Technician program offered through Continuing Education. It is not clear how the CMAP – Dental Administration Assistant program relates to the Certified Dental Assistant program but it does not seem to be a direct competitor.

h) The Graphics and Web Design stream offers a diploma in Web Design and skills upgrading in 7 different software areas. These program offerings are in competition with the Web Design certificate in the School of Business offered through Continuing Education.

### **Vancouver Career College**

The Vancouver Career College has 10 locations, with 8 in BC including a campus in Victoria. The Victoria campus offers programs in Healthcare, Business and Hospitality. The High Tech programs are not currently offered in Victoria.

a) The Healthcare programs include Medical Office Assistant, Medical Pharmacy Assistant, Pharmacy Assistant/Technician, Early Childhood Education, Practical Nursing, Medical and Dental Office Administrator, Dental Office Administrator, and Resident Care Attendant. These programs compete directly with many of the Camosun Health and Human Services and Business programs including: Medical Office Assistant, Pharmacy Technician, Early Childhood Care and Education, Practical Nursing, and Home Support/Resident Care Attendant.

b) The Business programs offered by Vancouver Career College include Business Administration programs with specializations in Management, E-Commerce Management, and Import/Export Management), a diploma program in International Trade, Insurance Services Specialist, and Accounting and Payroll Administrator. These programs compete directly with many of Camosun's business programs such as the diploma in Business Administration, diploma in Office Management, the Applied Business Technology programs, and the Business Management certificate.

c) The Hospitality programs include both a diploma and certificate through the American Hotel and Lodging Association and BC certificates in Serving It Right and BC Foodsafe. These programs compete directly with the Hotel and Restaurant Management diploma, and the certificates in Tourism and Travel.

### **Malaspina University College**

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 is divided into 10 program groupings, *all* of which compete with Camosun College's program offerings.

a) The Business and Management programs cover all of the programs offered by Camosun and, in addition, offer two bachelor's degrees and one master's degree. The only programs Camosun College offers that Malaspina doesn't are the golf programs (Professional Golf Management, Business Golf Management). Specifically, the Malaspina Business and Management programs include: Applied Business Technology, Bachelor of Tourism Management, Bachelor of Business Administration, Certificate in Business Management, Continuing Health

Care Administration, Diploma in Business Administration, Hospitality Management, Management Skills for Supervisors, Master of Business Administration, Post-degree Diploma in Business Studies, Recreation and Sport Management Diploma, and Tourism Studies Diploma.

b) The Career and Academic Preparation programs provide many of the same programs as the Camosun School of Access. The programs are grouped into Access programs which are employment and life skills, Adult Basic Education, and English as a Second Language programs. Preparatory courses are offered by the Learning Centre.

c) The Fine and Performing Arts programs include 4 diploma programs (Diploma in Visual Art, Diploma in Applied Arts – Graphics, Diploma in Applied Arts – Interior Design, Music – Jazz Studies Diploma), a Bachelor of Arts with a minor in visual arts, and two-year transfer programs to UBC or UVic in Theatre. These program offerings are in competition with the Diploma in Music, Certificate in Music, and Diploma in Visual Arts.

d) The First Nations programs include a Bachelor of First Nations Studies, a one-year First Nations integrated course called Arts One – First Nations, a diploma in Child and Youth Care – First Nations, the Native Indian Teacher Education Program, and the Forestry Bridging program. These program offerings are in competition with First Nations Community Studies and the First Nations Family Support Worker. Camosun's First Nations reserved sections of various courses (such as First Nations Academic Upgrading, First Nations Civil Engineering Technology Access, and First Nations Home Support/Resident Care Attendant) do not seem to be offered. This could be a competitive advantage for Camosun College among First Nations students.

e) The Health programs at Malaspina include Community Mental Health Worker, Dental Assistant, Home Support/Resident Care Attendant, Practical Nursing and Graduate Nurse Re-entry. Bridging programs are also available to allow Home Support/Resident Care Attendant graduates to take Practical Nursing in a shorter time (8 months, compared with 12 months). These programs are in competition with the following programs offered by Camosun: Community Mental Health Worker, Certified Dental Assistant, Home Support/Resident Care Attendant, Practical Nursing Access for Resident Care Attendants, and Practical Nursing.

One advantage of Camosun's programming is the availability of separate sections for various groups. In the case of Camosun's Home Support/Resident Care Attendant program, the ESL and First Nations sections offer a unique focus to the program.

f) The Human Services programs at Malaspina include a diploma in Child and Youth Care, diploma in Child and Youth Care First Nations, diploma in Early Childhood Education and Care, Human Services certificate (with a speciality in

Community Support Worker, or in Special Education Assistant), and the diploma in Social Services. These programs are in competition with Camosun's diploma in Community, Family and Child Studies, certificate in Community Support Worker, First Nations stream of Family Support Worker, certificate in Early Childhood Care and Education, Community Support Worker, and Addiction Studies.

g) The Technology/Technician programs include Computing Science, Digital Media Technologies, Fisheries and Aquaculture Technology, Forest Resource Technology, Horticulture Technician, Information Technology and Applied Systems, Internet Essentials, and Resource Management Officer Technology. While some of these programs are not offered at Camosun, a number of them are, including: Computer Systems Technology, Computer Engineering and Electronics Engineering Technology, Network and Electronics Technician, Computer Graphics Technician, and certificate in Horticulture Technician.

h) The Trades and Applied Technology programs at Malaspina include Automotive Service Technician, Baking – Professional, Barber/Stylist, Carpentry Framer Technician, Culinary Arts, Hairdressing, Heating, Ventilation and Air Conditioning/Refrigeration, Heavy Duty/Commercial Transport Mechanic, Heavy Equipment Operator, Inboard/Outboard Marine Technician, Public Safety Communications, Pulp and Paper Operations, and Welding. These programs compete directly with the following Camosun programs: Automotive Mechanical Repair, Automotive Service Technician apprenticeship, certificate in Carpentry, Carpenter apprenticeship, Culinary Arts, Cook Training apprenticeship, Heavy Duty/Commercial Transport Mechanic, Welding and Welder apprenticeship.

Malaspina only offers engineering as part of a transfer program to UVic or UBC. It does not offer any engineering credentials. Camosun, therefore, has a competitive advantage in all of its engineering programs (civil, chemical, computer, electronic, and mechanical) because graduates will have both a diploma and the ability to transfer to UBC or UVic.

Camosun offers additional programming in electrical, plumbing and pipe fitting, and sheet metal (ELT and apprenticeship), as well as unique trades programming in Fine Furniture.

Malaspina has a Horticulture Therapy program under development.

In September 2005, the ELT program, Carpentry Framer Technician will be offered at Cowichan Lake campus.

i) Malaspina offers 7 bachelor degrees with various majors, minors and other program variations. The degree programs are in Arts, Child and Youth Care, Education, Music, Science, Fisheries and Aquaculture, and Nursing. Many of the diploma programs transfer into the degree programs.

j) Other university programs and transfer options at Malaspina include a diploma in Criminology, similar to the Criminal Justice diploma offered at Camosun.

***Thompson Rivers University – Open Learning***

With the inclusion of the BC Open University as part of the Thompson Rivers University, all of the distance learning options previously available through the Open Learning Agency are now part of the new TRU university structure.

Although located in Kamloops, the distance education courses offered by TRU – Open Learning that compete with Camosun’s program offerings include: Administrative Assistant, Executive Diploma in Management, Licensed Practical Nurse, and Medical Laboratory Assistant. These programs provide very similar programming to Camosun’s Office Administration certificate, advanced certificate in Executive Assistant, certificate in Business Management, diploma in Business Administration, diploma in Office Management, Practical Nursing, and Medical Laboratory Assistant.

***The University of Phoenix – Vancouver***

The University of Phoenix is the largest private university in the US with 163 campuses in the US, Puerto Rico, Canada, and Mexico. With the slogan “university for working adults”, the institution’s marketing targets a number of markets not well served by traditional postsecondary providers, such as those not in urban centres, those unable to attend in the day time, and transient workers who do remain in one place long enough to complete a credential. The University of Phoenix claims “you can complete your degree no matter where you live, what hours you work, or how often you travel or relocate.” The Vancouver campus of the University of Phoenix offers three areas of programming.

a) The Business programs at the University of Phoenix – Vancouver are primarily graduate programs with 4 masters programs (Master of Business Administration, Master of Business Administration/Global Management, Master of Business Administration/Human Resource Management, and Master of Business Administration/Technology Management) and one undergraduate degree, the Bachelor of Science in Business/Management.

b) The Education programs offered are both graduate degrees (Master of Arts in Education with a Specialization in Administration and Supervision, and Master of Arts in Education with a Specialization in Curriculum and Instruction). No undergraduate degrees, diplomas or certificates in education are currently offered at the Vancouver campus.

c) The Technology qualification offered is a Master of Business Administration/Technology Management. No undergraduate degrees, diplomas or certificates in technology are currently offered at the Vancouver campus.

The University of Phoenix – Vancouver held an information session in Victoria on 10 May 2005 at the Hotel Grand Pacific.

### **Moderate Competition**

Another third (33%) of the broad competitors provided moderate levels of competition to Camosun College. Almost all (86%) of these institutions were located in Greater Victoria, most (71%) had been in Victoria since at least 2001, and just over half (57%) were public.

The local postsecondary institutions offering a broad program at a moderate level of competition with Camosun College were: Canadian College,<sup>3</sup> northStudio.com Inc, Royal Roads University, School District 61 (Victoria) Continuing Education, School District 62 (Sooke) and SkillSoft.

The only moderate competitor that did not have a campus in Victoria was BCIT whose comprehensive course offerings and specialized programs make it a moderate competitor for Camosun. In September 2005, BCIT will begin offering a two-year degree transfer program in science and technology. The program provides students with the requirements for entry into Forensic Science, Environmental Health, Biotechnology, Radiation Therapy, and Technology Teacher Education with added advantage of guaranteed enrolment to the full program for members of the cohort.

### **Low Competition**

Finally, 24% of the broad providers were in low competition with Camosun programming. These institutions were almost all (80%) private, sixty percent (60%) were continuing institutions. They were equally likely to be located either in the Lower Mainland (40%) or elsewhere in BC and beyond (40%), with only 20% in Victoria.

The only local postsecondary institutions offering a broad program but at a low level of competition with Camosun College was Pacific Design Academy.

Low competition broad providers that did not have a campus in Victoria were: Athabasca University, Granton Institute of Technology, Thomson Education Direct, and Trinity Western University.

### **Not in Competition with Camosun**

About twenty percent (21%) of all the postsecondary institutions identified in the Victoria educational market were offering courses or programs that did not compete with Camosun's program offerings. All of these providers were private postsecondary institutions, three quarters (77%) have been around Victoria for a while, at least since 2001, and most (71%) were located in Greater Victoria. These postsecondary providers were primarily offering programs in the area of

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<sup>3</sup> Canadian College has a business school, a film and acting school, an English language school, and a highschool preparation school.

alternative medicine, with a few institutions providing training in massage therapy, film production, or acting schools.

The local postsecondary institutions offering programs not in competition with Camosun College were: BC School of Art Therapy, Canadian Acupressure College, Canadian College of Acupuncture, CPR Society, First Nations Training and Consulting Services, International College of Traditional Chinese Medicine, Ohio College of Acupuncture and Herbology, Slipstream Adventures Ltd, , St. John's Ambulance, The Longevity Centre, Victoria Motion Picture School Ltd, and West Coast College of Massage Therapy.

Institutions without a campus in Victoria yet advertising in the Victoria telephone book included: Dominion Herbal College, Okanagan Valley College of Massage Therapy Ltd, Screen Actors Studio, Spotlight Academy for Actors and Models, and Windsong School of Healing Ltd.



## **Summary**

The increase in number of postsecondary institutions competing in the Victoria education market has been significant, with the number rising from 54 institutions in 2001 to 89 institutions in 2005. Three quarters (73%) of the institutions included in this study were located in Victoria. Almost all (86%) institutions were private and some of the key competitors for Camosun were private.

Half (51%) 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 program from the School of Trades and Technology confronting the most specialized competitors.

The broad providers, with program offerings across all Camosun schools, were the most important competitors for Camosun College in 2005. Of the broad providers, the institutions rated at a high level of competition should draw our 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, CDI College, Computer Master Institute of Technology, Academy of Learning, and Vancouver Career College. 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 courses, compressed delivery, evening and part time options, 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 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.

Finally, about one in five institutions active in the Victoria educational market were offering programming in areas not currently covered by any Camosun College programs. Many of these providers provided programming in alternative medicine.

Overall, Camosun College is challenged on all sides with small private providers springing up to offer specialized programs, large public and private providers offering very similar programming in a variety of formats, and a striking increase in the number of the postsecondary providers cluttering the local educational market. All of these factors make it more difficult for Camosun's programs to stand out and to capture the attention of prospective students.