# FOREIGN AFFAIRS AND INTERNATIONAL TRADE CANADA

## Best Practices on Managing the Delivery of Canadian Education Marketing

The Illuminate Consulting Group

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# IMPRINT

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## Legal Disclaimer



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# ABBREVIATIONS

## Organizations

| | |
|---|---|
| AACRAO | American Association of Collegiate Registrars and Admissions Officers |
| AAU | Association of Atlantic Universities |
| ACCA | Association of Chartered Certified Accountants |
| ACCC | Association of Canadian Community Colleges |
| ACE | American Council on Education |
| ACF/CampusFrance | Agence CampusFrance |
| AEI | Australian Education International |
| AFEMI | Agence française pour l'expertise et la mobilité internationales (French Agency for International Expertise and Mobility) |
| AIEF | American International Education Foundation |
| AILIA | Association de l'industrie de la langue/Language Industry Association |
| AIRC | American International Recruitment Council |
| APEC | Asia Pacific Economic Cooperation Forum |
| AQEF | Association québécoise des écoles de français |
| AUCC | Association of Universities and Colleges of Canada |
| AUFC | Association des universités francophones du Canada |
| AusAID | Australian Agency for International Development |
| Austrade | Australian Trade Commission |
| BCCIE | British Columbia Council for International Education |
| BERR | UK Department for Business, Enterprise and Regulatory Reform |
| BIS | UK Department for Business, Innovation and Skills |
| BMBF | Bundesministerium für Bildung und Forschung (German Federal Ministry of Education and Research) |

| | |
|---|---|
| BMZ | Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung (German Federal Ministry for Economic Cooperation and Development) |
| CAGS | Canadian Association of Graduate Schools |
| CAIS | Canadian Association of Independent Schools |
| CAPS-I | Canadian Association of Public Schools International |
| CBIE | Canadian Bureau for International Education |
| CECN | Canadian Education Centre Network (CEC Network) |
| CETAC | Canadian Education and Training Accreditation Commission |
| CeLEA | Canadian eLearning Enterprise Alliance |
| CFS | Canadian Federation of Students |
| CHE | Chronicle of Higher Education |
| CHEC | Canadian Higher Education Committee |
| CIC | Citizenship & Immigration Canada |
| CICIC | Canadian Information Center for International Credentials |
| CIDA | Canadian International Development Agency |
| CIDE | Consortium for International Development in Education |
| CIIE | Council on International Education Exchange [US] |
| CIS | Center for International Studies [Australia] |
| CMEC | Council of Ministers of Education, Canada |
| CNIE | Canadian Network for Innovation in Education |
| CNOUS | Centre national des oeuvres universitaires et scolaires (National Centre for School and University Welfare) |
| CREPUQ | Conférence des Recteurs et Principaux des Universités du Québec |
| CSTD | Canadian Society for Training and Development |
| DAAD | Deutscher Akademischer Austauschdienst (German Academic Exchange Service) |
| DEEWR | Department of Education, Employment and Workplace Relations |

| | |
|---|---|
| DEST | Department of Education, Science and Training (now DEEWR) |
| DFAIT | Department of Foreign Affairs and International Trade [Canada] |
| DFG | Deutsche Forschungsgemeinschaft (German Research Foundation) |
| DG | BMBF Directorates-General |
| DIUS | UK Department for Innovation, Universities and Skills (now BIS) |
| ECA | US Department of State, Bureau of Educational and Cultural Affairs |
| ECF | Espaces CampusFrance (CampusFrance Spaces) |
| ENZ | Education New Zealand |
| EUA | European University Association |
| HESA | Higher Education Statistics Agency [UK] |
| HIS | Hochschul-Informations-System GmbH |
| HRSDC | Human Resources & Skills Development Canada |
| IAO | US Department of Education, International Affairs Office |
| IDP | IDP Education Australia, Ltd. |
| IEAC | International Education Association of Canada |
| IEMA | International Education Marketing Agency (coined by ICG to refer to recommended agency for Canada; not suggested as an actual agency name.) |
| IES | IES Abroad |
| IIE | Institute of International Education |
| IJAB | Fachstelle für Internationale Jugendarbeit der Bundesrepublik Deutschland e.V. (International Youth Service of the Federal Republic of Germany) |
| IPSEA | International Public School Education Association |
| IU | UK Higher Education International Unit |
| JIU | BIS Joint International Unit |
| LC | Languages Canada / Langues Canada (LC) |
| MAÉE | Ministère des Affaires Étrangères et Européennes (French Ministry of Foreign and European Affairs) |

| | |
|---|---|
| MCIE | Manitoba Council for International Education |
| MÉN | Ministère de l'éducation nationale (French Ministry of National Education) |
| MESR | Ministère de l'enseignement supérieur et de la recherche (French Ministry of Higher Education and Research) |
| MIINDS | Ministère de l'immigration, de l'intégration, de l'identité nationale et du développement solidaire (French Ministry of Immigration, Integration, National Identity and Solidary Development) |
| MIT | Massachusetts Institute of Technology |
| MPG | Max Planck Gesellschaft (Max Planck Society) |
| NACC | National Association of Career Colleges |
| NAFSA | NAFSA, Association of International Educators |
| Nuffic | Netherlands Organization for International Cooperation in Higher Education (previously, Netherlands Universities Foundation for International Cooperation) |
| NZEIL | New Zealand Educational International, Ltd. |
| NZTE | New Zealand Trade and Enterprise |
| NZVCC | New Zealand Vice Chancellors' Committee |
| OECD | Organization for Economic Cooperation and Development |
| PAD | Pädagogischer Austauschdienst (Educational Exchange Service) [Germany] |
| PC | Polytechnics Canada |
| PCH | Patrimoine canadien/Canadian Heritage |
| RCCFC | Réseau des CEGEPs et Collèges francophones du Canada |
| SDAI | CNOUS International Affairs Sub-Directorate |
| SEAMEO | Southeast Asia Ministers of Education Organization |
| THE | Times Higher Education |
| UCAS | Universities and Colleges Admissions Service |
| UIS | UNESCO Institute for Statistics |
| UKCOSA/UKCISA | UK Council for International Student Affairs |

| | |
|---|---|
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| USBT | US-Based Training Program [ECA/Education USA] |
| USNEI | US Network for Education Information |
| UUK | Universities UK |
| WB | World Bank |
| WTO | World Trade Organization |
| WUSC | World University Services of Canada |
| QS | Quacquarelli Symonds, Ltd. |

## Currencies

| | |
|---|---|
| AUD | Australian Dollar |
| CAD | Canadian Dollar |
| EUR | Euro |
| GBP | Great British Pound, or Pound Sterling |
| NZD | New Zealand Dollar |
| USD | US Dollar |

## Terminologies

| | |
|---|---|
| APPLE | Asia Pacific Professional Leaders in Education Conference (conference organized by QS) |
| EEL | New Zealand Export Education Levy |
| ESL | English as a Second Language |
| ESOS Act | Education Services for Overseas Students Act [Australia] |
| ISL | New Zealand International Student Levy |
| FE | Further education |
| HE | Higher education |
| MENA | Middle East and North Africa (region) |
| MIP | Marketing Information Package [AEI] |

| | |
|---|---|
| NGO | Non-Governmental Organization |
| PACE | ENZ Promotional Activity Calendar for Education |
| PAL | Professional Advising Leadership fellowship [US] |
| PISA | Programme for International Student Assessment |
| PMI/PMI2 | Prime Minister's Initiative (Phases 1 and 2) [UK] |
| YoY | Year-over-Year |
| REAC | EducationUSA Regional Education Advising Coordinator |
| SIA/SIA 2010 | Study In Australia / Study In Australia 2010 [AEI] |
| STEM | Science, Technology, Engineering, and Mathematics |
| QA | Quality assurance |

# FOREWORD

DFAIT is pleased to release this report.

# EXECUTIVE SUMMARY

## Introduction

This report was commission by the Department of Foreign Affairs and Trade (DFAIT) with a view to identifying best practices for managing the delivery of Canadian education marketing. The need for commissioning this report arose from a multitude of factors, including the increase in promotion activities from competitor countries, as well as domestic struggles to respond to such competitive pressures in an coordinated manner. The aim of this report is to provide detailed guidance to Canadian policy-makers and stakeholders with a view on improving Canada's international education marketing delivery performance.

## Methodology and Limitations

Research for this report drew on a wide variety of sources, ranging from core student mobility data sets (e.g.; CIC, OECD), to a literature search, to background interviews, to an online survey of DFAIT and CEC Network staff. Feedback discussions with stakeholders and experts were employed to assure the accuracy of data analysis and the chosen conceptual approach.

Any report which covers as wide a set of investigative topics as this report does is bound to operate with limitations. For one, data on international students is subject to collection and definition problems; this is clearly the case with regards to CIC data. Another key limitation of this report was the short timeframe in which it had to be completed and which did not allow for a further, in-depth probing of some findings.

## Acquiring Talent for a Knowledge-Driven Economy

It would be easy to characterize the issue of recruiting international students as a "nice to have" policy. Nothing could be farther from reality. The transition of advanced nations from an industrial and/or service sector dominance into a knowledge-driven economy is well underway.

The talent and skills required to compete in such an economy are in short supply globally, and competition for talent has increased notably over the last decade despite the marked increase in higher education enrolments overall. Canada's future workforce needs require a focused, balanced, and competitive approach to succeed in this environment.

## Competitor Activities

Attracting international students does not take place in a vacuum. In 2009, intense global competition for recruiting top talent on the one hand, and attracting large quantities of income-generating international students on the other is a simple reality. Competition in both areas can only increase given international students' sought-after financial contributions to their host economies, as well as the pressure to recruit talent in order to stay competitive in key science and research fields.

The report analysed the international education landscape and performance trajectories of six key competitor countries. Findings indicate that the leading recruiter of international students, the US, has recovered from its post-9/11 enrolment slump but has yet to fundamentally improve its marketing operations. The UK is home to the most well balanced recruiting operations, aided by proficient marketing operations.

Both France and Germany experienced strong enrolment growth early in the decade only to see enrolments flatten out or outright decline in recent years. Australia without question has earned its reputation as marketing champion, but now faces a number of issues, not least a damaged quality reputation. New Zealand, owing to its small size, has seen strong fluctuations in enrolments owing to its dependence on a few Asian source countries. Common to all competitor countries are clearly articulated policies which emphasise the importance of international student recruitment.

## Canada's International Student Recruitment Landscape

Canada has managed to increase the number of international students (all sectors) from 114,098 (2000) to 178,227 (2008). Yet this growth effectively has translated into a loss of global market share from 5.0% (2000) to 4.4% (2008) in the tertiary sector (OECD). It can be said that this enrolment increase is due more to the strength of Canadian education rather than the quality of promotion activities. Going forward, this situation is not sustainable, especially since year-over-year growth rates have slowed to low single digits since 2004 in the face of a much stronger global expansion of international student enrolments.

Notable differences between education sectors emerged, with the "other post-secondary education" sector performing very well lately. By contrast, the trade sector has experienced a strongly declining enrolment trend. The largest sector, universities, has experienced a sustained decline in enrolment growth rates and entered negative growth territory in 2008.

The recruiting performance described above was underpinned by a fragmented and under-funded promotion support landscape. Unique amongst its key competitors, Canada can neither draw on a federal ministry of education, nor on a centralized, well resourced marketing agency. As a result, Canada has lacked a coordinated approach and at times even a basic presence in key international education arenas. The struggle of the CEC Network to define a viable business and service model serves as a case in point.

## Recommendations

### Introducing IEMA

ICG is recommending the creation of a new, stand-alone international education marketing agency (IEMA[1]), owned by the Canadian Government.

IEMA should be: Small, agile, and performance-oriented; expertise-driven; ready to grow and evolve; and uniquely Canadian.

IEMA will face the challenge of integrating itself into a fragmented, complex, and currently shaken-up landscape. It is important to keep in mind that in order to ensure IEMA's success under these conditions, everyone must agree to compromises; there will be no room for dogmatic positions.

### Phased Roll-Out and Development

IEMA will most likely have to be created and rolled-out in a phased approach:

- A transition phase of ideally one to two years to repair, rationalize, and re-orient the current landscape.
- A start-up phase ideally lasting approximately one year.
- A ramp-up phase lasting toward the end of an initial five-year budget cycle.
- An assessment, revision, and repurposing step following the completion of the initial budget cycle.

During the first two phases IEMA will have to outsource substantial aspects of its program activities. Some of these activities may prove to be well suited for continued outsourcing.

It is critical that IEMA be conceived, rolled-out, and developed with a view on

[1] IEMA is only used for convenience purposes and not suggested as a name for the to-be created agency.

the international education competition landscape five to ten years out. This will require a focus on expert research and analysis, high quality marketing support services to education providers, and the facilitation of high quality training.

## Organizational Design and Governance

IEMA should be headquartered in Ottawa, but it should rapidly develop a deep, broad, and diversified international presence through offices, councillors, partners, and academic/administrative staff leverage models. Currently existing in-country expertise and office presences might be tapped if aligned with common promotion goals. A physical in-country presence will remain essential in the future.

Broad stakeholder representation in IEMA's governance is desirable. But static, abstract governance models which would make it difficult to respond to changing conditions should be avoided. IEMA should set up expert program committee structures to support its program development.

## Funding

While the Canadian Government should provide core funding for operational purposes and some programs (e.g. brand), additional revenue streams such as a visa permit fee are deemed essential to align providers with IEMA. ICG suggests an initial funding effort of CAD 22 million annually (run rate at year three) for IEMA.

## Specific Development Recommendations

The report concludes with three specific recommendations which can be implemented independently from any eventual roll-out of a dedicated international education marketing agency.

First, the report addresses the need for expert marketing and market analysis training amongst Canadian stakeholders. Second, it suggests focusing on increasingly popular online promotion models. Third, the report proposes a comprehensive and integrated scholarship strategy. All three recommendations aim to address current practices which require either a substantial up-skilling or a more concerted approach to promote Canada as a potential destination for international students.

# 1. INTRODUCTION

## 1.1 Background and Scope of the Report

### Background

Canada has been successful with regard to attracting international students to study in Canada over the last decade – total enrolments of international students across all sectors rose from 114,098 in 2000 to 178,227 in 2008, an increase of 56.2% (CIC).

However, any feeling of complacency would be quite misplaced. During a similar timeframe (2000-07), global tertiary international student enrolment increased from 1,901,188 to 3,021,106 students, an increase of 58.9% (OECD). The 2009 OECD Education at a Glance report notes that Canada's market share of tertiary international students dropped from 5.0% to 4.4% during this seven year period[2].

Another reason to avoid complacency is that, in part, Canada's international student recruitment success owes more to external events and dynamics – such as the impact of the 9/11 terrorist attacks on US student recruiting, the continued marketing struggles of Germany, and the increase in outwardly mobile students (first from China and then India) – than to Canadian practices and recruiting structures.

Rather, it has been the undeniable quality of Canada's educational offerings and the possibility of post-graduation immigration which seem to have driven international student mobility into Canada.

Competition for international students is indeed increasing in a rapid and sustained fashion. Established international student destination countries such as Australia and the United States have strengthened their recruiting practices, and new competitors such as China and Singapore are forcefully emerging. Specific examples of the increase in competitive behaviour by these countries include:

- As indicated by recent reports, China already enrols approximately 200,000 international students. Even just five years ago, few experts would have forecasted such an enrolment dynamic in the world's largest student export country.

[2] The most recent data published by the OECD does not include data for 2008. Canada's 0.6% drop in market share from 2000 to 2007 reflects OECD data definition methodology. OECD does not always map easily or consistently to data as defined by respective countries.

- Singapore still pursues its ambitious goal of attracting 150,000 international students and has just announced the creation of two new, elite level higher education institutions.
- The United States has addressed many of its student visa processing issues which caused notable consternation after 9/11, and has undertaken concerted outreach initiatives in the Middle East, which have seen significant success.
- Australia has added to its already strong international education marketing practices by making available an additional AUD 3.5 million (CAD 3.2 million) for its Study in Australia 2010 initiative.

Given the increase in competition for international students – coupled with an even fiercer level of competition for highly talented students – the Canadian international education landscape must reorganize and reposition itself in order to have a chance to compete for talent, and to meet the stipulated goal of doubling international student enrolment over the next decade.

Any organizational and policy changes must, as a matter of course, reflect the existing international Canadian marketing landscape, which has the following three characteristics.

First, is the high degree of fragmentation, which is partially a reflection of the constitutional responsibility of Provinces and Territories for education on the one hand and the related absence of a Federal ministry for education on the other. This has left Canada without a central education policy body but for the Council of Ministers of Education, Canada (CMEC).

CMEC serves as a forum for policy issue discussion, a mechanism for the undertaking of joint projects, a means of consultation with national education organizations and the federal government, and as an instrument to represent the provinces' and territories' education interests abroad. However, CMEC is arguably under-resourced and cannot serve the same function such as a federal ministry, or a dedicated international education marketing agency. This situation has proved challenging when competing internationally.

Second, Canada is the only leading international student destination which does not have a governmental or quasi-governmental central organization to carry out promotional activities, and therefore lacks a powerful, central voice. Canada's only dedicated organization in this area is the CEC Network, which declared bankruptcy in June 2009 and whose future is unclear.

Another Canadian organization involved in international education promotion is CBIE. CBIE, however, is not a comparable organization to a CampusFrance, DAAD, or Australian Education International on any

meaningful level. Moreover, CBIE's activities and footprint outside Canada are modest at best.

The Federal government, through its network of embassies, consulates and high commissions, has provided support to the education sector, although both the quantity and the quality of said support remain uneven. Because these are indirect support mechanisms, a substantial improvement in the absence of central policy guidance and resourcing cannot be realistically expected.

Provincial governments have promoted their respective institutions, but find it increasingly disadvantageous to promote their province in the absence of a strong Canadian brand. To compensate, many provincial governments have created and/or funded provincial organizations to advance their interests such as BCCIE. However, whether target markets and potential students actually respond to a Provincial marketing story is unclear – from a student's perspective, provincial or state-based educational brands are often not of relevance.

Third, Canadian international education marketing is under-resourced, under-staffed, too fragmented, and in need of expert skills training relative to leading competitors. Evidence for this assessment can be found in a wide set of instances: The modest quality of education marketing web portals; the lack of influence in the international education community; the lack of perception of Canada as a leading education provider in many sending countries; and Canada's overall marketing activities, which saw the first launch of a national brand only as recently as the Fall of 2008.

Going forward, this is not a sustainable competitive situation. While most competitor nations have visibly sharpened their marketing message, Canada has fallen behind in relative as well as absolute terms (as OECD data shows). Feedback from international education participants – ranging from education agents to international students – indicate that the perception of the Canadian education system is characterized by a lack of clarity about what Canadian education stands for.

Addressing this situation is no simple task, and to expect a quick fix would be misguided. Canada must make a number of fundamental policy decisions about how it wants to compete for international students in terms of organization, direction, policy responsibilities, and resourcing. Any decision must reflect a competitive landscape five to ten years out, instead of focusing on yesterday's fading competitors.

This will require fundamental departures from current practices and a movement toward a more centralized, integrated, and streamlined delivery of

evidence-based education marketing efforts. This should occur in a redefined channel mix which utilizes online delivery to a much larger extent than is currently in use. Critically, the aforementioned promotion approach cannot simply attempt to copy other nations' practices; rather, it must be a genuine, uniquely Canadian solution.

## Scope

This report addresses the situation described above in five major steps. First, it reflects on two key drivers for the general increase in international student mobility: The transition of many countries into a knowledge economy, and the increasing need for international talent acquisition to support this transition.

Second, the report outlines and analyzes the international education marketing efforts of Canada's key competitor countries – Australia, France, Germany, New Zealand, the United Kingdom, and the United States – in terms of both structure and performance.

Third, Canada's international student recruitment landscape is discussed in terms of sectoral trends, organizations involved, and overall performance relative to competitor nations.

Fourth, a list of the components of an international education marketing landscape is drawn up, with a view of suggesting changes and improvements. In totality, these suggestions are intended to give rise to a new, internationally competitive education promotion delivery mechanism.

Fifth, specific development options and recommendations for Canada are offered, which are aimed at areas requiring significant improvement, such as the use of advanced marketing tools, analysis training, and the development of compelling online marketing platforms.

## 1.2 Methodology

### Introduction

#### Research Methods

Research for this report employed a variety of standard research methods and tools to collect data, analyze trends, evaluate policy, and verify findings and recommendations. These include:

- Interviews. More than 25 interviews were conducted, either through an online survey, telephone calls, or in-person.
- Online survey. ICG created a web-based survey which was distributed to stakeholders outside Canada. The results of the survey have been incorporated into Chapters 4 and 5.
- Literature review. ICG drew on a wide set of reports and analysis produced by governmental agencies, think tanks, mobility services, and academic researchers.
- Web-based search. For supporting and contextual information, ICG searched relevant web-based data repositories, information portals, and institutional websites.
- Data collection and analysis. Data from key organizations were collected, analyzed, and converted into the graphs that are seen throughout this report. Detailed data tables corresponding to the information displayed in the graphs can be found in the report's Data Appendix.
- Quality control. As a matter of standard practice, ICG attempted to ensure the factual quality of its research by utilizing primary sources, multi-sourcing information if possible, and fact checking and validating data through analysis and correspondence with the covered organizations and other experts.
- Feedback discussions. Before submitting this final report to DFAIT, preliminary findings were shared with select experts and stakeholders to elicit feedback regarding the applicability and suitability of the analysis and recommendations in the report.

#### Research on Internationalisation

In 2009, the first attempts have been made to organize a more concerted research effort, through the Roundtables on Research in Internationalisation of Higher Education convened by Hans de Wit, a

former President of the European Association for International Education[3]. Over the next few years, the emergence of more and better research can be hoped for.

### Confidentiality

As a general policy, ICG does not identify individual interviewees or quote from interviews directly. This is done in order to protect the confidentiality of interviewees' perspectives, as much as to avoid using quotes rather than analysis to arrive at a policy conclusion.

## Literature Review

International education marketing has quite rapidly become a mainstay of the international education landscape. Yet it remains a relatively young practice area which is, for now, characterized by a just emerging body of literature, much of which is not deeply analytical in nature.

Specifically, strategic, evidenced-based international education marketing is still a small field. Advanced marketing methods and tools such as the deployment of sophisticated business intelligence applications, or the use of game theory to shape competitive behaviour, are barely if at all reflected in sector literature[4].

In connection with this, it is safe to say that the availability of core data on international education – whether on student mobility, resourcing, or policy-making – remains insufficient at best. To complicate matters further, even basic, shared definitions of international education elements do not exist. For example, there is no commonly agreed upon definition of "international student", which is treated as something of a catch-all term denoting vastly different things.

[3] The first Roundtable on Research in International Education was held at the 2009 EAIE Annual Conference in Madrid. The Roundtable drew about 40 participants who exchanged views on themes, methodology, challenges, networking, resources and databases with respect to international education. This initiative, in collaboration between EAIE and the Journal of Studies in International Education (JSIE, Sage/ASIE) follows a similar but smaller set-up at 2008 AIEC Annual Conference in Brisbane, which will be repeated in Sydney in October 2009.

[4] For example, a web-based search for "international education marketing" and "game theory" yields less than a handful of results. One of the few academic programs which teach game theory as part of their curricula is NYU's Ph.D. Degree in International Education.

## Data

This report utilizes a number of common international education data sources, including the OECD, UNESCO (UIS), and World Bank. In addition, country specific sources were drawn upon, including:

- Australia: DEST/AEI (DEST is now DEEWR)
- Canada: CIC and DFAIT
- France: CampusFrance
- Germany: BMBF, DAAD/HIS
- New Zealand: ENZ, NZVCC
- United Kingdom: HESA
- United States: IIE

Much of the country analysis relies on in-country data sources, as these are deemed to be more relevant and/or granular than OECD or UIS data collections. In almost all instances, OECD and UIS data do not match in-country data. Sometimes differences are small (one to three percentage points), at other times differences run at ten percentage points or more).

In this context, it also must be noted that not all country-based data sets are directly comparable. For example, IIE international student enrolment data for the United States include community colleges, many of which essentially fulfil a further or tertiary education role. In contrast, data for Germany and New Zealand only reflect actual higher education enrolment.

This report relies solely on public data, as well as certain data relevant entities made available to ICG for the purpose of this report. This, in turn, means that certain data gaps exist. For example:

- Private entities such as IDP and ENZ do not make their financial data publicly available. ICG either made estimates of such data or left those data fields blank.
- A number of French ministries affirmed that specific budget or staffing numbers are not being made public.
- The Department of State, Bureau of Educational and Cultural Affairs, which runs educationUSA, refused to release any data relating to the organization. ICG filed a Freedom of Information Act request for this information, which is pending.

Another issue which frequently impairs the analysis of international education trends are breaks in time series data owing to changes in data capture definitions or changes to the underlying education system itself. At times,

definition changes are extended to past years which result in multiple conflicting data points for a given year. In this report, this issue affects multiple countries:

- New Zealand data is sourced from the Ministry of Education from two data sets (2000-06 and 2007-08). Owing to incompatible sector to country of origin definitions no analysis of students by country of origin can be provided. Instead, a regional analysis was undertaken.
- UK data was adjusted downward for 2006 and 2007 owing to a change in definitions, resulting in what appears to be an artificial decline of international enrolment in 2006.
- Data for France for 2007 and 2008 was sourced from other sources than CampusFrance, but is deemed reliable.
- Data for the United States was sourced from IIE. IIE data for 2008 showed a surprisingly large increase in international student enrolment, much of which was due to a little publicized change in accounting methods.

While much effort was spent on retrieving and analyzing data, it should be made clear that no assurance of entirely clean data sets can be given. In addition, certain data were subject to interpretation – especially in the case of budgetary data – and while care was taken to be as accurate as possible, certain budget data should be treated with caution.

## Country and Marketing Practice Coverage

DFAIT made a number of documents available for this report which highlight the discussions and efforts behind the establishment of the *Imagine Education au/in Canada* brand. Research covering other countries has drawn on a wide array of documents, ranging from reports commissioned by agencies such as UUK, ENZ and DAAD; to comparative reports issued by ACE, EUA and the Observatory on borderless higher education; to academic publications in the JSIE, CIHE, and Canada's *Universities Go Global*.

## Consultative Approach

During the course of the research for this report, ICG consulted with more than 25 Canadian stakeholders through a web-based survey, telephone interviews, correspondence, and in-person meetings. Stakeholders included governmental department staff members; representatives from major associations, representative bodies, and agencies; representatives from the Provinces and Territories; and leadership from education providers.

In addition, on 12 August 2009, DFAIT organized a stakeholder meeting at Meech Lake which was moderated by ICG. The meeting was attended by more than 30 Canadian international education stakeholders. This meeting was specifically designed to allow stakeholders to voice their questions and concerns.

A large majority of Canadian stakeholders cooperated freely and productively with ICG by sharing their experiences, expertise, and needs. This much appreciated exchange provided important context for this report. It must be noted, however, that a few entities took a much less cooperative role. While unhelpful, this behaviour did not influence the report's analysis and recommendations.

## 1.3 Limitations

### Timeframe

This report was drawn up within the time frame of about two months, owing to DFAIT's requirements. This is unusually short for a report of this nature and limited ICG's ability to add contextual information and additional data.

### Data

As previously discussed, data availability and quality were subject to a host of challenges. Specific references to these problems are made throughout the report as warranted.

One fundamental challenge was the lack of in-depth data on students entering, studying, and remaining in Canada. This issue has been widely discussed, yet remains unresolved. While CIC made useful data available to ICG, significant gaps remain. For example, visa data on language students is not collected, which ties into an overall problem with the way CIC categorizes and collects sectoral data. Data on study subjects chosen, the mode or funding nature of a student (from exchange to full fee paying), and education-to-immigration tracking data are also not available.

This lack of data is a serious deficiency, which hampers efforts to better understand the pathways of students entering and leaving Canada. It also significantly hinders marketing channel optimization as well as integrated promotion approaches.

### Focus

This report was scoped with a clear focus on Canadian education marketing. The latter is of course deeply embedded in a complex landscape relating to education providers, policy-makers, funding bodies, students (and their parents), numerous service providers, as well as the corresponding landscapes in other countries. This report touches on these complexities, but any expectation of deep analysis cannot be fulfilled.

# 2. TRENDS AND DEVELOPMENTS DRIVING INTERNATIONAL EDUCATION

## Introduction

A discussion of relevant factors driving the development of international education would merit its own, extensive report. For the purpose of this report, two major drivers are focused and commented on.

Arguably the most important societal and economic demand factor is the global transition to a knowledge economy. This transition is already starting to shape major aspects of how societies and businesses organize themselves, with examples including international, collaborative innovation policies; changes in workplace requirements and needed skills on the one hand and workforce displacement on the other; and fundamental shifts in how businesses create value by moving away from an industrial product development cycle to a knowledge-driven cycle.

On the supply side, international talent acquisition has become a focus of policy-makers, education institutions, students and their families, and the media. Talented individuals have come to enjoy an unprecedented range of educational and professional options unimaginable just a decade ago.

Yet while many more individuals benefit overall from the hunt for talent, truly "elite" opportunities have become ever harder to compete for. A case in point: Applications to the world's top universities as well as to elite employers have increased notably.

The purpose of this discussion is to highlight the genesis and implications of these two factors. Both contribute to the broad parameters which shape how Canada can promote its educational offerings and potential workforce and/or immigration opportunities.

## 2.1 Transition to a Global Knowledge Economy

### Introduction

The concept of a knowledge economy was popularized in a 1969 book titled *The Age of Discontinuity* by Peter Drucker. In his book, Drucker makes the argument that, in the aftermath of World War II, America was transitioning from a goods-based economy to a knowledge-based economy, as reflected in

the growth of what he called "knowledge industries", which "produce and distribute ideas and information rather than goods and services"[5].

In hindsight, it might have been more correct to speak of an *information-based economy* rather than a *knowledge economy* when reflecting the post World War II period. In the 1980s information technology innovations had reached a point at which their compound impact began to facilitate the transition to a true knowledge-based economy.

This transition, led by the US, was initially limited to a few countries. Today, dozens of countries are moving toward a knowledge-based economy, ranging from highly developed countries such as most OECD members to more recent aspirants such as Qatar or Singapore.

A core requirement of a knowledge economy is a well educated workforce which can master and manipulate information and technology tools and platforms, and continue to adapt to innovation pressures. This has accelerated the importance of higher education in two ways: First, by replacing menial, low-skills jobs, demand for workers without a higher level of education has begun to recede. Second, by requiring workers with more advanced skills to develop, maintain, and operate value-generating processes and products, demand for workers with higher levels of education increases.

Demand for higher education therefore has increased alongside this transition to a global knowledge economy. For example, in the United States, 30 years ago, 28% of workers aged 30 to 59 had some post-secondary education; by 2003, more than 60% of that employee bracket were post-secondary educated, and a third of them had higher education degrees[6]. In China, the percentage of the population between 17 and 23 years old which enroled in post-secondary education increased from 3% in the late 1980s to 23% in 2007-08[7].

## The Impact of a Transition to a Knowledge Economy on Higher Education

In the transition toward a knowledge economy, higher education has become the cornerstone on which national economic competitiveness is built. This is both in terms of producing an educated workforce in high quality, internationally attractive tertiary institutions, and also with regards to contributions to innovation leading to new products and services. Higher

[5] Source: Drucker, Peter. *The Age of Discontinuity*. 1969 (p. 263).
[6] Source: Carnevale, Anthony and Desrochers, Donna. *Standards for What? The Economic and Demographic Roots of Standards Based Reform*. 2003.
[7] Source: Chronicle of Higher Education.

education is on its way to become a key pillar of national economic development, and a major contributor to a nation's GDP.

One effect of a global knowledge economy is that the higher education sector is itself becoming increasingly global. There are a number of developments which highlight this trend:

- The most relevant development is the rise in higher education enrolments worldwide. In 1970, 29.4 million students were enroled in higher education. By 1980, this number had risen to 55.3 million and by 1990 to 67.6 million. By 2006, 141.5 m students were enroled. This is a near five-fold increase over 36 years and more than 110 m additional students.
- This increase has recently been underpinned by a rapid expansion of higher education capacity in countries such as China, India, Malaysia, and Singapore. Higher education is becoming much less European and North America-centric as a result.
- Probably the most often cited example is the increase in student mobility. The most recent OECD figure pegs international tertiary student figures at 3.0 million (2007), up from 1.9 million in 2000. Some reports have implied the enrolment of seven million or more international (tertiary) students by 2020.
- The number of higher education institutions alliances has increased significantly over the last decade and now stretches across the entire quality range of institutions; it is no longer the purview of leading research universities.
- The emergence and increasing influence of global university ranking systems, such as the Shanghai Jiao Tong Academic Ranking of World Universities and the Times Higher Education – QS World University Rankings.

An inherent effect of a developing knowledge economy is the increased depth, diversity, and outright fragmentation of research, science, and teaching areas. As a reflection on this dynamic – which is coupled with a rise in student participation in higher education and increased competition between institutions – tertiary education providers have responded by offering more diversified and specialized products and services.

The consequence of this trend is an increasing segmentation of education providers into brand and performance niches, ranging from global flagship universities to strictly regional teaching institutions. Such a landscape has been in place in the US for decades. In contrast, countries such as Germany have just begun to re-set policy to acknowledge this reality (i.e. the excellence initiative which commenced in 2006).

## Implications for Canadian International Education

There are six major considerations for Canada's international education landscape arising from the transition to a global knowledge economy.

First, Canada, in theory, stands to profit from the increased demand for high quality tertiary education and English language training. As the subsequent data discussion will show, international student enrolments in Canada indeed have risen, but there are important qualifiers with regards to the real level of success of this increase. Probably the most important qualifier is whether Canada can attract top talent, or "just" increasing numbers of international students.

Second, Canada must defend its position as a high quality education country. Many traditional education powerhouses have slipped in recent decades and are struggling to recover. For example, discussions about excellence in primary and secondary schooling see Singapore or Finland being mentioned, but not Germany or the US.

In the university sector, momentum seems to have shifted to China and possibly India over the next decade while discussions concerning France or Italy typically center on competitive decline scenarios. With the emergence of new competitors, maintaining if not raising quality therefore is imperative to Canada's competitive position and related to the above consideration.

Third, progressive and internationally active Canadian higher education institutions will become increasingly "disembedded" from their national roles[8]. For example, some might morph into globally embedded centers of research excellence with a deeper embedding into communities outside Canada than within Canada (Germany's Max-Planck-Society has taken tentative steps in this direction).

Others might become truly international student experience providers by recruiting more than half of their students and therefore raise a sizable part of their budget from outside Canada (the London School of Economics' international student enrolment stands at more than 65%). This trend will challenge both federal as well a regional policy-making in Canada.

Fourth, increasingly, intellectual content will become more freely distributed. This is already a reality in certain institutions, such as MIT, which has initiated an open courseware project that allows anyone on the internet free access to videos of its courses and copies of its course materials. UC Berkeley, which

[8] Source: Marginson, Simon. *Higher Education in the Global Knowledge Economy.* 2007.

has had more than 2.5 million channel views on its dedicated YouTube EDU channel, is in the process of uploading all its undergraduate classes[9].

Institutions such as MIT and UC Berkeley which have begun to disseminate high quality intellectual content have already gained significant global brand exposure. By contrast, not a single leading Canadian university has even created a dedicated YouTube EDU channel.

Fifth, national education policy-making will have to become more internationalized. One example for this trend is the need to focus more closely on the treatment and national status of international students and faculty. This has already started to occur in countries such as Australia, with its Education Services for Overseas Students Act 2000, and in New Zealand, with its Ministry of Education's Code of Practice for the Pastoral Care of International Students.

Sixth, research policy-making will have to address changes in the way research is carried out. In an era which has seen multi-billion dollar, global use research facilities – ranging from Lawrence Livermore's National Ignition Facility to CERN's Large Hadron Collider – become operational the need for smart transnational research funding policies is apparent. It may very well turn out to be in Canada's national interest to substantially fund such international ventures at the expense of domestic facility provisioning; this would require a departure from traditional research policy-making models.

All of the considerations described above impact Canada's international education landscape. Any comprehensive international education policy and development approach must not only take all of these factors into account, but also come to terms with their growing mutual interdependence. Like many other countries, Canada faces challenges for which it is better prepared than others, and it will be imperative to address those areas in which it lags being while further building on areas of leadership.

[9] The most popular course, Integrative Biology 131, has attracted more than 350,000 views as of 15 September 2009. See www.youtube.com/ucberkeley.

## 2.2 International Talent Acquisition

### Introduction

A web-based search for "international talent acquisition" yields more than 110,000 results. The vast majority of these results reflect on commercial aspects of acquiring workforce talent. When translated into educational nomenclature, "international student recruiting" results in nearly 280,000 hits. The bottom line is that identifying and attracting talent has become a key factor in the development and improvement of institutional and national competitiveness levels.

In relation to the global transition to a knowledge economy, and the resultant increase in global demand for skilled, educated labour, a scramble for talent at all levels of the economy has become visible. In 1997, McKinsey published a study titled *War for Talent* which surveyed over 6000 executives and managers (updated in 2001).

It concluded that in the coming decades, the corporate world's most valuable and scarce resource will be human talent. It predicted that as demand for talent increased, supply would decrease, eventually fuelling an intense war for talent among companies, with the finiteness of talent creating a zero-sum situation for the players involved.

This competition for talent, encompassing both students and researchers, has also reached the higher education sector. Countries and universities are becoming more and more aggressive in their recruitment efforts: Increasingly, students are being presented with new, attractive course options; can choose from emerging quality institutions; and highly talented students and researchers are increasingly offered attractive financial packages to entice them to enter an institution or education system.

### The Added Impact of Demographics on the Competition for Talent

One of the causes of the war for talent in the private sector is that the baby boomer generation has reached or is reaching retirement age, creating a sudden dearth of experience and talent in the workforce as they leave it. Similarly, for higher education, the majority of the generation of the baby boomers' children have made most or all of their way through higher education.

The ramping up of capacity that occurred in order to accommodate the original increase in intake may now result in sagging enrolments in higher

education institutions as the wave of the generation passes through it. This demographic trend is already affecting a number of Canadian education institutions. Recruiting international students might thus become a basic necessity to deal with declining domestic enrolments. Similarly, an increased focus on recruiting researchers internationally has already been observed, driven by en impending retirement wave in many higher education systems.

For the majority of tertiary education institutions, this emerging situation has begun to drive competition behaviour for international students at a quantitative level. Given the broadly projected increases in international student mobility, sustained competition will become a manageable reality.

For those institutions which attempt to recruit top talent the situation is drastically different: They will face a hyper-competition scenario. Under this scenario, demand for talent will by far outstrip supply – despite the aforementioned rise in total higher education students since the 1970s, the pool of truly talented students has grown at a much lower rate. This will raise the cost of talent and likely lead to a substantial increase in institutional stratification patterns.

## Implications for Canadian International Education

Canada's future workforce needs, when set into relation to its expected domestic supply of tertiary graduates, simply requires the recruiting of international students (and researchers) in order to bridge skills gaps and/or address skills shortages. As a reflection, the Canadian Government proposed in 2007 to double the number of international students in Canada over a ten year time period.

The most clear implication is that Canada as a nation, and education providers as recipients of international students, must whole-heartedly embrace international student marketing and recruitment in order to remain competitive. Many countries have already implemented aggressive strategies to attract international student talent. The two UK Prime Minister's Initiative for International Education (PMI and PMI2) are an example of this. The second phase – launched in 2006 – set the ambitious goal of creating an influx of 100,000 international students to Britain by 2011.[10]

Yet Canada does not need just *numbers*, it needs *talent*. In recent years the dangers of a low skill recruiting strategy such as espoused by many

[10] Source: PMI2 website. See www.britishcouncil.org/eumd-pmi2-overview.htm.

Australian tertiary education providers have become apparent[11]. As a result, Australia is now facing serious brand damage which has the potential to affect the recruiting of talented students as well.

In order for Canada to succeed with its international marketing plans to attract more (talented) international students, a number of factors must be aligned, amongst which are:

- A significant and lasting improvement of international education marketing and recruiting practices across all participants in Canada's international education landscape. This report will comment on such suggested improvements in Chapter 5.
- A clear, competitive articulation of why Canada is a desirable destination. This will also involve a competitive element which in many instances will require an articulation as to why Canada is superior to a potential other destination.
- A relentless focus on maintaining the quality of educational offerings and services. Slip ups in quality will not only immediately be noted around the world, they are also difficult and expensive to recover from.

[11] In recent months, attacks on Indian students in Melbourne have found wide-spread press coverage. The shut-down of private providers which left students stranded after these had paid thousands of dollars of tuition has also been covered widely in the media.

# 3. COMPETITOR REVIEW

## 3.1 Focus, Scope and Selection of Competitor Review[12]

### Focus

The focus of this competitor review centers on the questions of how competitor countries organize their international education marketing landscape, how they resource it, how they govern it, and what kind of success the above decisions and practices have brought about with regards to attracting international students.

There are many other issues which contribute to the overall positioning of a higher education system, ranging form environmental attraction (e.g., New Zealand) to ties into well known industrial businesses (e.g., Germany), to a widely held assumption of institutional academic quality (e.g., US). While these issues are all relevant, a clear emphasis is placed on marketing and recruiting themes.

### Scope

The competitor review focuses on an analysis of the international education marketing activities, statistics, and policy decisions by key agencies, ministries, and associations in a given competitor country[13]. As a result, lessons were derived for potential policy decisions to be drafted by DFAIT and these were used to inform the report's recommendations in Chapters 5 and 6.

In addition to the above analysis, this chapter also offers a brief analysis of salient international student recruiting trends in a given country since 2000. This analysis provides useful context about the magnitude and direction of international student recruiting efforts.

[12] Please note that the discussion of institutions and organizations in competitor countries relies on source materials which at times have been adapted. In order to allow for an easier text flow, only some are marked with quotation marks.

[13] The review did not investigate education providers themselves as this would have been impractical given the country, sectoral, and activities scope of this report.

## Selection

The selection of the six competitor countries was based on three criteria. First, a country's overall market position in the tertiary international student recruiting market (requiring a minimum 2.0% market share). This resulted in the following ten recruiting countries ranking which accounted for 79.8% of all tertiary level international students in 2007 (OECD):

- United States, 19.7%
- United Kingdom, 11.6%
- Germany, 8.6%
- France, 8.2%
- Australia, 7.0%
- (Canada, 4.4%)
- Japan, 4.2%
- New Zealand, 2.1%
- Russia, 2.0%
- Spain, 2.0%

In a second step, these nine countries were categorized by whether they are actively competing for international students in markets relevant to Canadian international education providers. This resulted in a slightly shortened list:

- United States, yes
- United Kingdom, yes
- Germany, yes
- France, yes
- Australia, yes
- Japan, yes
- New Zealand, yes

In a final step, countries were selected for an approach to international education marketing which would likely yield applicable learning experiences to Canadian institutions and agencies. As a result, the below list of six competitor countries emerged:

- United States
- United Kingdom
- Germany
- France
- Australia
- New Zealand

## 3.2 Australia

### International Education Marketing and Recruitment Trends

#### Introduction

Australia has been an unabashed success story with regard to attracting large numbers of international students across all sectors to study in Australia, or an Australian offshore campus. In many ways, Australia, through its education providers and organizations such as AEI and IDP, invented modern international education marketing, and it arguably continues to lead this practice.

While Australia has received extensive coverage for this marketing prowess, other important factors have received less attention. The decision to attract international students was in fact born out of domestic funding cuts which resulted in education institutions being pushed into pursuing alternative revenue sources.

Given Australia's small industrial base and low governmental investment into research, even leading research universities have come to rely on international tuition receipts to cross-subsidize research. The latter point is symptomatic for a slow but steady hollowing out of the quality foundation of Australian higher education, the second referenced factor.

Many Australian universities have found themselves in a position in which recruiting international students has assumed a critical budgetary role. With rising competitive pressures and changes in traditional recruiting markets, a number of them have run into financial difficulties.

It remains to be seen whether the recent increase in national marketing efforts such as *Study in Australia 2010* or attempts to address concerns about quality with an aggressive counter campaign, will be effective in the long-term.

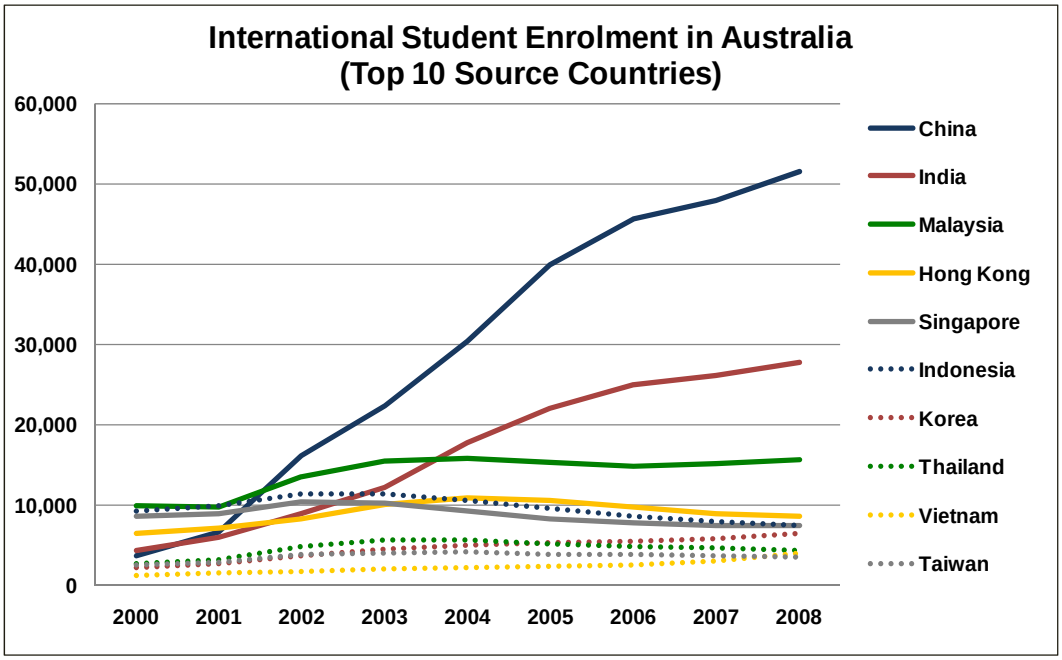
Yet betting against Australia has proven unwise before. The Australian international education sector has developed a high degree of resilience against external pressures, and to date has managed to innovate at a rate which has made it the world's leading international marketer and student recruiter.

International Higher Education Student Enrolment Trends

Between 2000 and 2008, total international higher education student enrolment grew from 72,717 to 182,770. This growth, as the below graph depicts, was fundamentally underpinned by rising enrolment of students from China (from 3,712 to 51,600) and India (from 4,374 to 27,701). In 2008, more than 43% of all students hailed from these two countries.

Rounding out the top five sending countries in 2008 are Malaysia with 15,652 enrolments, Hong Kong with 8,552 enrolments, and Singapore with 7,499 enrolments. Positions six to ten in 2008 are lead by Indonesia with 7,472 enrolments, South Korea with 6,389 enrolments, Thailand with 4,260 enrolments, Vietnam with 3,908 enrolments and Taiwan with 3,458 enrolments.

**International Higher Education Student Enrolment in Australia by Top 10 Source Countries (Total, 2000-08)**

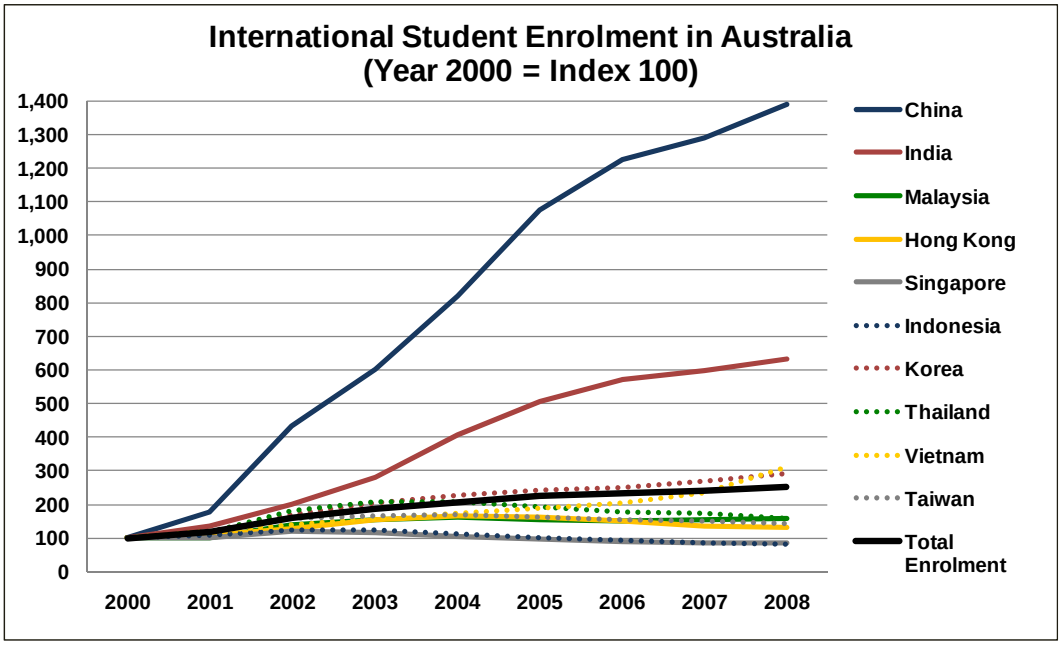



Notes: See Appendix.
Source: AEI.

The below, index-based graph further reinforces the impact students from China and India have for the Australian international education market. Enrolments from China have increased by a factor of 14 since 2000, while Indian student enrolment has grown by a factor of more than 6. Two other strong growth source countries are Vietnam and South Korea, which sent

about three times the student headcount to Australia in 2008 when compared to 2000. In contrast, both Singapore and Indonesia, starting in 2004, have sent increasingly fewer students to Australia.

### International Higher Education Student Enrolment in Australia by Top 10 Source Countries (Index, 2000-08)




Notes: See Appendix.
Source: AEI.

The above data discussions may have painted a picture of strong if not outright excessive growth in international student enrolments. This, however, would be an incomplete portrayal of recent growth dynamics as the below graph, which is based on a year-over-year growth analysis, shows.

Australia experienced very high growth rates at the start of the decade. For example, overall enrolments in 2002 grew at an annul rate of nearly 34%. Since then, annual growth rates have slowed down significantly and since 2006 have ranged from 2.9% to 4.7%. This slowdown in many ways was inevitable. Annual growth rates of more than 10% in mature international education systems such as Australia's are probably no longer realistic.

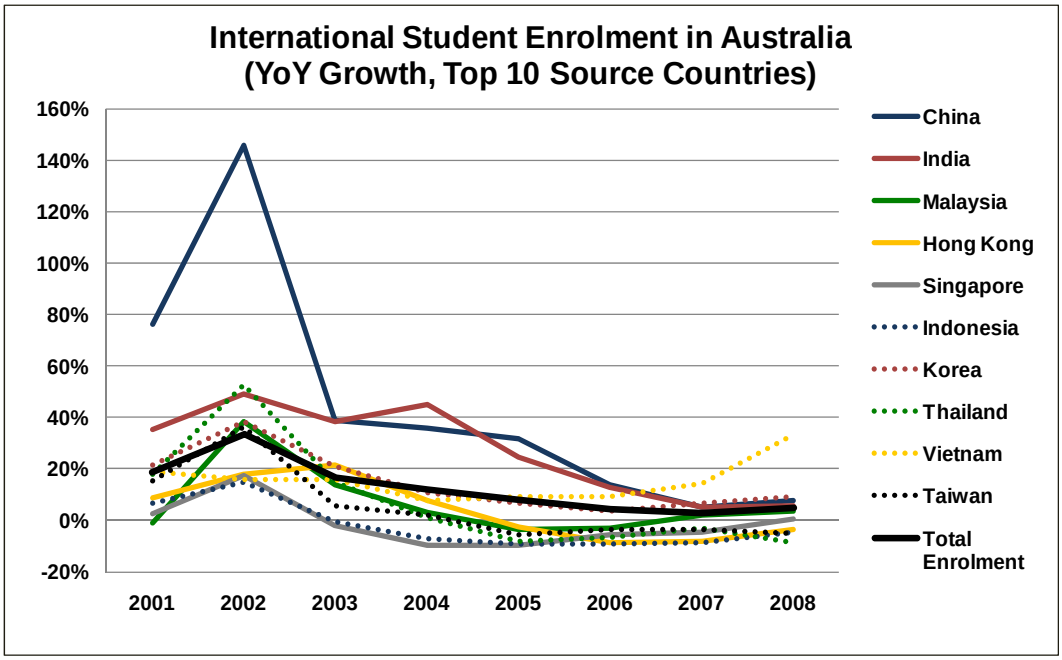
Three trends stand out. First, enrolment growth of Chinese students has had a very strong impact on the overall growth rates of international

students in Australia. In 2008, 44.8% of enrolment gains were based on increased Chinese student enrolments.

Second, this number rises to 75.3% when South Korea and Vietnam are added. Australia's market development, as many Australian stakeholders worry, has become dangerously over-reliant on a few Asian markets.

Third, in 2008, five of the top ten source countries either experienced negative or flat growth (Hong Kong, Singapore, Indonesia, Thailand, and Taiwan). Reasons vary by country, but domestic capacity creation, coupled with an increasing concern about the quality of some Australian education offerings, are key drivers.

### International Higher Education Student Enrolment in Australia by Top 10 Source Countries (YoY Growth, 2001-08)




Notes: See Appendix.
Source: AEI.

## Australia's International Education Marketing Landscape

Australia's international education marketing landscape is led by the Federal government, the most relevant ministry being the Department of Education, Employment and Workplace Relations (DEEWR). DEEWR was recently created to absorb two previously separate ministries, the Department of Education, Science and Training (DEST) and the Department of Employment and Workplace Relations (DEWR). DEEWR has a workforce of over 6,000 staff. The division of DEEWR that deals with international education is Australian Education International (AEI), formerly a part of DEST (for an organizational capsule see below).

The Australian Trade Commission (Austrade) is another notable participant in Australia's international higher education sector. As the Federal government's trade and investment development arm, Austrade operates as a statutory agency within the government's Foreign Affairs and Trade portfolio, and its CEO reports directly to the Minister for Trade. Austrade assists local businesses across all sectors with trade and investment, one sector being Education and Training.

One example of its work in this area is its partnership agreement with AEI, where Austrade undertakes promotion and marketing activities in Europe on behalf of AEI. Austrade has a network of 117 international offices in 63 countries, as well as 18 offices within Australia. In 2007-08, its staff headcount was 1,029, and it received AUD 170 million (CAD 152.7 million) in operational funding from the Australian government, and AUD 157.0 million (CAD 141.0 million) for administering the Export Market Development Grant scheme (EMDG). Austrade raised AUD 34.0 million (CAD 30.5 million) of revenue through its services.[14]

The higher education sector is represented through the umbrella organization Universities Australia, formerly known as the Australian Vice-Chancellors' Committee. Universities Australia, headquartered in Canberra, is staffed with a workforce of 20. It is primarily funded by annual contributions from its 38 member universities, whose interests it represents both nationally and internationally. It supports Australian universities in their activities, which include internationalization efforts, staff and general development, and negotiating common purchasing agreements. It also promotes the welfare of students, staff and graduates of Australian universities. Its budget in 2006 was AUD 5.4 million (CAD 4.8 million).[15]

[14] Source: Austrade Annual Report 2007-08.
[15] Source: Universities Australia Annual Report 2006.

On the commercial side, IDP Education Australia Pty. Ltd. (IDP), a global company offering development project services, has become widely know for its agent role as well as its optimistic statements on the development of international education[16].

IDP's three major business areas are the recruitment of international students, English language testing, and the management of international trade projects. These translate into specific services ranging from student placement and development scholarships to personnel training and literacy training.

IDP's primary focus is on education and training, an area in which it undertakes projects on behalf of host governments in developing countries, as well as funding agencies such as the Australian Agency for International Development (AusAID), the World Bank, and the Asian Development Bank. Half of IDP's equity is owned by Australia's 38 universities, and the other half is owned by SEEK Ltd, an online employment and training company.

IDP's workforce comprises 600 staff around the world. It does not make its budget publicly available.

Other relevant organizations include:

- AustraLearn, which provides university students with study abroad programs in Australia, New Zealand, and the South Pacific.
- The Education Board Network, which also offers study abroad programs in Australia and New Zealand.
- IES Abroad, a Chicago-based non-profit organization that enrols students in its study abroad programs in 31 cities around the world.
- The Center for International Studies, which sends approximately 500 students abroad annually to programs in ten countries.

[16] IDP's CEO, Tony Pollock, was quoted in December 2008 that "in many respects it [international education] is recession-proof". Events in 2009 of course proved that international education in many ways has been and continues to be negatively impacted by the global economic and fiscal crises.

## Organizational Capsule: Australian Education International (AEI)

AEI operates through a national office in Canberra and an international network of 25 offices in 17 countries, mainly based at Australian embassies, high commissions, and consulates. Its strategic directions are guided by the Federal government, in particular by DEEWR.

Its mandate is to develop international education policy advice, represent and promote Australian education abroad, oversee quality assurance and consumer protection in Australian education, and recognize certifications both for Australian and oversees educational institutions. It also performs industry research and analysis, and facilitates student mobility through a number of research, study, and professional development awards.

AEI works closely with several domestic agencies apart from DEEWR. These include the Department of Foreign Affairs and Trade, the Australian Trade Commission (Austrade), the Department of Immigration and Multicultural and Indigenous Affairs, the Department of Industry, Tourism and Resources, the Australian Tourist Commission, and the Australian Agency for International Development (AusAID). AEI therefore has access to the breadth and depth of most major institutions that influence international student mobility and attraction in Australia.

It also develops and maintains Australia's bilateral education and training relationships with overseas partners, using Memoranda of Understanding to formalize cooperative partnerships between DEEWR and foreign ministries of education. These agreements cover a range of relationships, from developing institutional links to cooperating in research, establishing staff exchange programs, recognizing each other's degree qualifications, exchanging education policy and governance information, and developing twinning programs.

In addition to foreign governments, AEI also works with international organizations such as the World Trade Organization (WTO), the Organization for Economic Cooperation and Development (OECD), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the Asia Pacific Economic Cooperation Forum (APEC), and the Southeast Asian Ministers of Education Organization (SEAMEO).

AEI has four branches. One of these is the International Strategy Branch, which primarily deals with stakeholder communication, sector research and analysis, the production of international student data, and the management of the *Study in Australia* national brand. *Study in Australia* was developed as a platform to promote Australia's international education landscape by helping

international students learn more about life and education in Australia. *Study in Australia* also provides a scholarship database that allows students to search for funding by state, type of course, and country of origin.

Another AEI branch is the International Quality Branch, which looks after AEI's quality assurance responsibilities. Some of its activities include the Transnational Quality Strategy, aimed at helping students studying abroad, and the Education Services for Overseas Students (ESOS) Act, which protects international student visa holders in Australia by enforcing minimum standards for tuition quality and student care, as well as providing tuition and financial assurance.

AEI's two remaining branches are organized by region: the Middle East, South and Southeast Asia branch on the one hand, and the North Asia, Americas and Europe branch on the other.

Among AEI's marketing and promotion activities is the industry-leading Market Information Package (MIP), a compilation of international education information, news and statistics, distributed to providers on a subscription basis. DEEWR stated that there are on average 160 monthly subscribers to the MIP.[17]

Currently, AEI is conducting a *Study in Australia 2010* drive which is funded at AUD 3.5 million (CAD 3.1 million). Over a nine-month period activities are being supported in Australia's major source countries: China, India, South Korea, Indonesia, Malaysia, and Thailand. These activities will focus on four themes: Enhancing student experience by improving guidelines around student welfare and support; showcasing excellence by engaging high-level Australian educators to speak at large international events; positioning Australia's international education reputation; and improving sector engagement with international education providers.

AEI operates with an international network of AEI Education Counsellors, who work out of the organization's 25 offices 17 countries. While AEI's own staffing figures are not individually available, DEEWR's average staffing level for 2007-8 for "Outcome 6: International Influence – Australian Education" was 200, and the estimate for 2008-9 is 190.

AEI's budget is determined by the funds allocated by DEEWR to the various international education-related Departmental Outcomes. In 2006-7, DEST listed a total of AUD 64.7 million (CAD 58.1 million) for "Support for Education and Training export industry"[18]. After the departmental merger, the portfolio

[17] Source: DEEWR Budget Statements, 2008-09.
[18] Source: DEEWR Annual Report 2007

outcomes were rearranged accordingly. For 2008-09, DEEWR's estimated budget for "Outcome 6: International Influence – Australian Education and Training" totals AUD 95.7 million (CAD 85.9 million), and of this, "International Education and Training" as a line item under annual administered services came to AUD 38.8 million (CAD 34.8 million).

## Australia – Basic Statistics

| | |
|---|---|
| Total population (2007) | 20,743,179 |
| GDP (2006) | AUD 966.0 b |
| GDP per capita (PPP) (2006) | USD 35,547 |
| Total number of students enrolled in tertiary education (2007) | 1,083,715 |
| Total number of outbound mobile students (2007) | 9,968 |
| Total number of international students in Australian education institutions (2007) | > 445,000 |
| Total number of international students in Australian higher education institutions (2008) | 182,770 |
| International students as a percentage of all tertiary enrolment (2007) | 19.5% |
| Total number of universities | 38 |
| Total number of higher education institutions | 109 |

Notes: International education and training is worth around AUD 12.5 billion (CAD 11.2 billion) a year to the Australian economy, and is the country's third largest export by earnings. The sector has grown at an average rate of approximately 15% per year over the last ten years.
Sources: DEEWR, OECD, UIS, Universities Australia.

## 3.3 France

### International Education Marketing and Recruitment Trends

#### Introduction

France's international education brand position and recruiting development dynamics differ from Anglo-Saxon recruiting countries in a number of structural aspects[19].

First, language not only matters, but fundamentally shapes market positioning. Native English speaking countries have clearly benefited from offering education in the world's foremost business language, not least by actually teaching English as a second language. In contrast, France until recently eschewed the usage of English as part of supporting the cultural relevance of French as a language. While a move towards adopting English has been visible – from offering higher education programs to CampusFrance's and CNOUS' websites – France, on a structural level, will continue to mainly attract French speaking students.

Second, similar to the UK which continues to maintain deep ties to Commonwealth countries, France has made significant investments into remaining culturally relevant in former colonies. This policy, coupled with the fact that some of these countries have modeled their higher education systems after the French system, has contributed to a distinct market position: Six of France's top ten recruiting markets are former colonies (Algeria, Cameroon, Morocco, Senegal, Tunisia, and Vietnam).

Third, France, similar to Germany and quite dissimilar to Anglo-Saxon recruiting countries, has continued to be a low cost study destination. Tuition fees in public universities and engineering colleges run between Euro 150 to EUR 700 per year (around CAD 230 to 1,100).

This low cost level has shaped recruiting dynamics in two ways. One the one hand, France is an attractive destination to international students with little financial means; the strong position in Africa is clearly related to this position. On the other hand, France has made little recruiting headway in countries such as Hong Kong, Malaysia, and Singapore in which a "consumerist" higher educator culture tends to equate cost with quality.

[19] France's competitive relationship to Canada is unique given the position of Quebec as a high quality, French-speaking education destination. France of course also competes with Canada in overall market for student talent.

A look at recent trends and progress moves three developments to the forefront. For one, France has come a long way, especially since 2005, not only in terms of both the amount of energy and money it has been investing in recruiting, but the improved efficiency with which it has done so. France decided to attract more talent, and has taken the steps to do so.

Examples are the creation of EduFrance in 1998 which morphed into CampusFrance and will assume a much more broad role in 2010 owing to the merger with CNOUS and Égide. CampusFrance's promotion efforts compare favourably with similar efforts by other continental European countries. France has also changed its immigration policies by allowing graduates to stay for a few months after graduation.

A second development has been the widely reported on strife in France's public universities (most recently in the spring of 2009), coupled with a growing international perception of the under-funding of public universities vis-à-vis the Grande Écoles. President Sarkozy had initiated a series of reforms beginning in 2007 which have aimed to make universities more self-reliant.

To this end, all universities are supposed to gain autonomy by 2012. While such reforms in theory should aid the development of institutional marketing efforts, the German experience has shown that universities which never built up capabilities in this area continue to struggle, often with the basics, many years later.

A third factor which is coming into play is the Bologna Process. Recent research indicates that the conversion to a three-year Bachelor model is inhibiting some intra-European student mobility owing to problems with timing and course selection. However, since the Bologna Process conversion is still underway it is too early to draw any definitive conclusions.

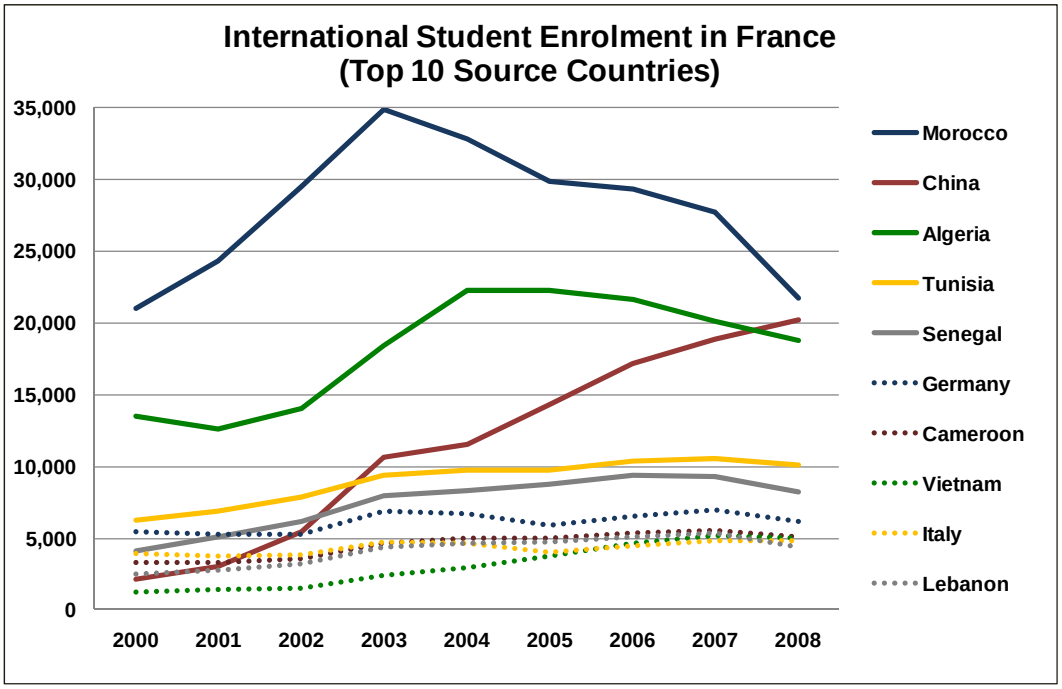
## International Higher Education Student Enrolment Trends

Between 2000 and 2008, total international higher education student enrolment grew from 160,533 to 260,596. This enrolment increase, as the below graph shows, was fundamentally underpinned by rising enrolments of students from five countries: China (from 2,111 to 20,160), Algeria (from 13,539 to 18,814), Tunisia (from 6,268 to 10,144), Senegal (from 4,079 to 8,255), and Vietnam (from 1,226 to 5,031).

The remaining leading sending countries in 2008 were Morocco with 21,710 enrolments, Germany with 6,163 enrolments, Cameroon with 5,100 enrolments, Italy with 4,784 enrolments, and the Lebanon with 4,406 enrolments.

France's international student intake has remained relatively fragmented. The top three sending countries (Morocco, China, and Algeria) accounted for just 23.3% of all enrolments in 2008, and the top ten sending countries accounted for a comparatively small combined 40.1% enrolment share.

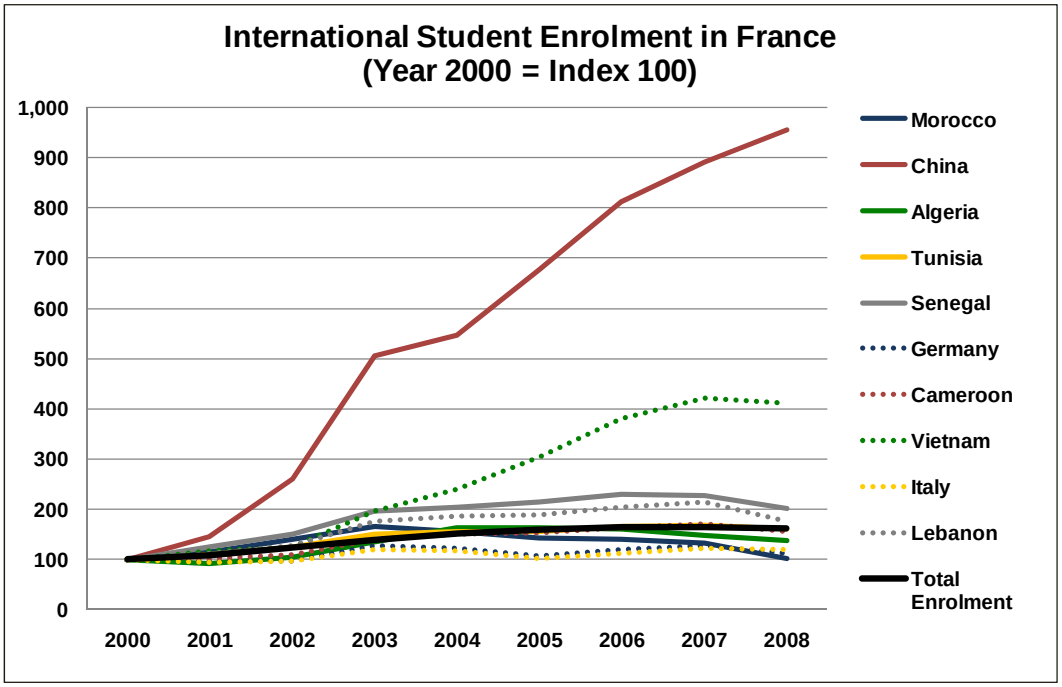
### International Higher Education Student Enrolment in France by Top 10 Source Countries (Total, 2000-08)




Notes: See Appendix.
Sources: CampusFrance, OECD.

The below, index-based graph shows the stand-out role of student enrolments from China which have grown by a factor of more than 9 since 2000. Enrolments from Vietnam grew by a factor of more than 4. All other top ten sending countries experienced moderate to no growth (factor 2 or less). Especially Morocco, the long-time leading student sending country, after strong growth patterns in the early part of the decade, has seen decline in student numbers since 2003 and by 2008 had effectively reached enrolment levels of 2000.

### International Higher Education Student Enrolment in France by Top 10 Source Countries (Index, 2000-08)




Notes: See Appendix.
Sources: CampusFrance, OECD.

Year-over-year growth trends reveal a common picture – after strong annual growth rates in the early part of the decade, growth rates declined to the point of reaching negative territory in 2007.

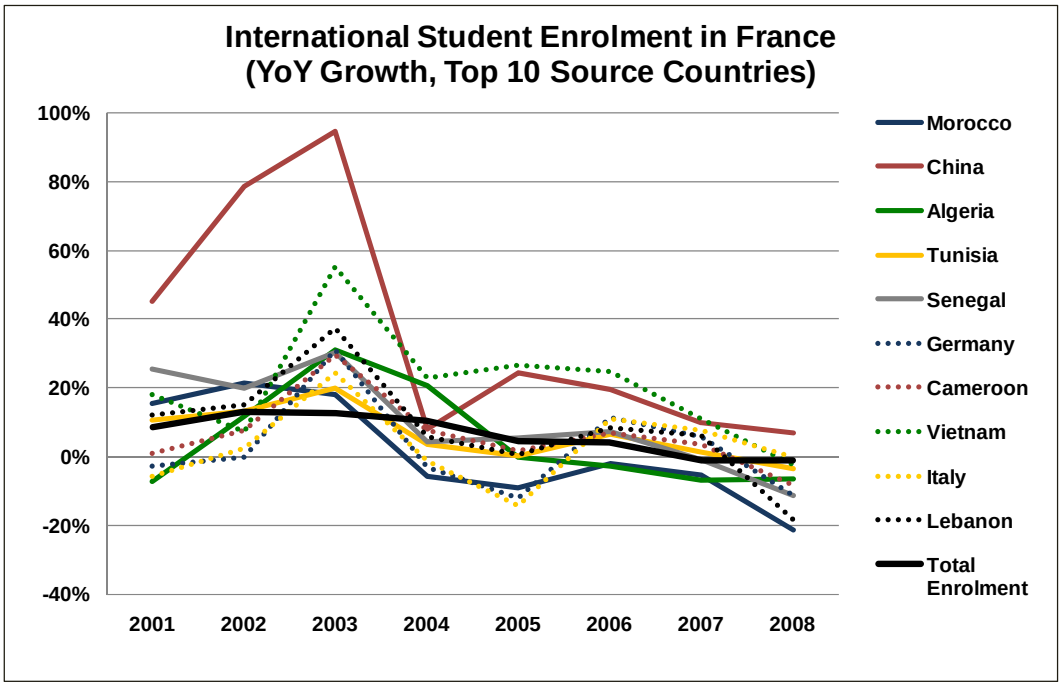
Four trends are worth noting. First, after an early period of unsustainably high growth rates, student enrolments from China continued to grow at strong levels (9.9% in 2007 and 7.0% in 2008).

Second, 2003 saw strong year-over-year growth rates from students hailing from countries with Muslim populations such as Algeria, Tunisia,

and Lebanon. One likely reason is post-9/11 diversion effects which were especially pronounced amongst Muslim students who had trouble obtaining a visa entry permit for studies in the US.

Third, since 2006, France has experienced notable competitive pressures as evidenced by the negative 2007 and 2008 annual growth rates. While there is no single reason, one issue seems to be the continued upheaval in the French university system. An interested student might have read more about strikes and strife than about France's educational offerings.

### International Higher Education Student Enrolment in France by Top 10 Source Countries (YoY Growth, 2001-08)




Notes: See Appendix.
Sources: CampusFrance, OECD.

## France's International Education Marketing Landscape

France's international higher education sector is the fragmented domain of several agencies, institutions and ministries. On the government side, there are no less than four ministries involved in international student recruiting: the Ministry of National Education (MÉN), the Ministry of Higher Education and Research (MESR), the Ministry of Foreign and European Affairs (MAÉE), and the Ministry of Immigration, Integration, National Identity and Solidarity Development (MIINDS).

MÉN is mainly responsible for primary and secondary education, and has a Europe and International Affairs (DREIC) section which coordinates student exchanges and cooperative initiatives with foreign higher education and research systems, and ensures that French diplomas are recognized internationally. It also oversees the recognition of foreign diplomas in France. Additionally, MÉN, in conjunction with MAÉE, funds and runs CampusFrance, France's main higher education promotion agency (for an organizational capsule see below).

MESR performs two roles: It promotes international cooperation and collaboration in research (mainly scientific), and it promotes student mobility. It seeks to attract the best research talent to France's laboratories by creating networks of research institutes, participating in international research projects that would see foreign researchers come to France for part of their research, and financing research that would see French researchers work and publish with foreign counterparts.

MAÉE focuses on strengthening France's position in the international knowledge economy international, which translates into its efforts to export "French-style" higher education abroad, as well as attracting and retaining top international talent via exchange and mobility programs.

To this end, it developed an "Attractiveness Policy" in collaboration with the Invest in France Agency in 2003-5, to analyze how students, researchers and investments were being welcomed in France. One of the recommendations resulting from this analysis was the establishment of a single office, the Centre for Studies in France, which eventually – coupled with EduFrance – resulted in the creation of CampusFrance.

MIINDS' main role in marketing France's higher education is two-fold: Under its immigration mandate, it encourages the immigration of professionals; under its integration and national identity mandate, it seeks to assist legal immigrants' integration into the country and facilitates professionals' integration into the domestic workforce.

MIINDS has sole control over policy dictating the issuance of student visas as well as work and residence permits – essential documents for any foreign national wishing to study in France – and is thus an integral part of any student's application process and time spent in France. MIINDS determines, for example, how many hours foreign students are permitted to work (off-campus), and is responsible for granting them permission to extend their stay for six months after graduation to seek employment.

Apart from the ministries and CampusFrance, another key player in the French higher education sector is the National Centre for School and University Welfare (CNOUS), which works in collaboration with the Ministries of Foreign and European Affairs and Culture and Communication, Égide, and CampusFrance.

CNOUS is responsible for student social services and seeks to improve students' living and working conditions (CNOUS provides housing for 157,000 students and manages over 800 university restaurants and cafeterias), with the aim of ensuring equal access for all to higher education. Its international section, the International Affairs Sub-Directorate (SDAI), is directly responsible for welcoming and seeing to the care of government, foreign, and international organization grant holders.

It also oversees the development of the CNOUS network's international activities through the signing of management accords with universities. CNOUS operates with a total workforce of 12,000 staff, the large majority of whom work in its 28 regional and 16 local service centres. 142 are employed at its head office, of whom 43 work in SDAI. Its funding totals at EUR 1.1 billion (CAD 1.7 billion), of which 29.8% comes from the MÉN, 3.5% from the MAÉE, and the remainder from CNOUS's own raised revenue.[20]

Another player is Égide, which manages exchange programs for international students and researchers, as well as the travel and living arrangements for French research missions abroad. It works for and with a wide range of institutions, companies, research centres, foreign governments, and international organizations. It also undertakes a significant amount of work on behalf of MAÉE, for whom it manages interns', students', and research grant-holders' files and money.

MAÉE contributes the majority of Égide's budget, paying it EUR 93.0 million (CAD 143.0 million) for program management in 2007-8.[21] In March 2009, Égide set up a subsidiary company, EGIDE Latitudes, to provide umbrella services to incoming interns, students and researchers, ranging from

[20] Source: CNOUS website.
[21] Source: Annual Report on Égide's activities for MAÉE.

preparation for their stay in France to health insurance and accommodation arrangements. Égide operates with a workforce of 200 and 26 offices in France.

Starting in May 2010, CampusFrance, Égide and France Coopération Internationale will be merged to form a new French Agency for International Expertise and Mobility (AFEMI), whose focus will be on bringing foreign experts, researchers and students to France, as well as sending French experts, researchers and students abroad.

## Organizational Capsule: CampusFrance

As noted above, CampusFrance will undergo a fundamental transition in 2010. This capsule therefore covers the programs and practices of CampusFrance which will undergo a significant structural revision in the near future.

The Agence CampusFrance (CampusFrance), originally founded under the name EduFrance in 1997, is a Paris-based public interest group dedicated to promoting French higher education abroad and fostering international mobility in higher education and research. It operates under the Ministries of Foreign Affairs, National Education, and Higher Education and Research.

While CampusFrance works with all French higher education institutions, it has established a network of "member institutions" whose number now reaches over 220, including 75 of France's 88 universities, 15 of its Grandes Écoles, and close to 50 engineering schools.

Through its offices abroad, the role of CampusFrance is to promote higher education and research in France, as well as to inform, counsel and pre-enrol prospective students. Students from 28 countries can apply to study in France online on CampusFrance's website. According to CampusFrance, "this new procedure significantly accelerates response time from education institutions and visa formalities." The local CampusFrance office will then monitor the student's file.

CampusFrance provides information both online and in-person at its offices abroad. Its website, translated entirely into English, provides prospective students with comprehensive information on France's education system, the application process, and life in France, including important visa and residence permit-related information. It also includes a grant and scholarship search engine.

One of its website's most important features is that it allows students to, for a fee, apply to study abroad in France, providing a single online application that is valid for all member institutions and also applies for a residence permit, which significantly reduces the time and paperwork needed by the student.

For its members, it publishes two bi-monthly newsletters which outline recent activities, analyses, studies and comparisons related to the field of international student mobility. Also, each year, CampusFrance organizes and/or takes part in education fairs, forums, and university tours around the world, in order to market French higher education.

CampusFrance employs 36 staff at its head office in Paris. Its workforce is mainly invested in promotion (40%), information (22%), and logistics (17%). CampusFrance staff work in one of two branches: General Coordination or Geographical Coordination.

CampusFrance's offices abroad are known as Espaces CampusFrance (ECFs), and operate under the supervision of the local French embassy. These offices provide follow-ups to online student applications and conduct personal interviews with students to help them refine their study goals and match these with suitable programs. There are 108 ECFs in 78 countries worldwide: 33 in Europe, 32 in Asia, 22 in the Americas, 13 in Africa, and 8 in the Middle East.[22] Each ECF is staffed by one to three staff members, who are paid by the embassy under which they work.

CampusFrance's total operating revenue in 2008 was EUR 5.9 million (CAD 9.1 million), about EUR 3.8 millions of which came from government subsidies, the remainder being driven by contributions from member institutions (EUR 874,000) and contracts with the European Commission. CampusFrance's budget has experienced reductions since 2007.

Of the government subsidies, the Ministry of Higher Education & Research contributed EUR 2.1 million (CAD 3.2 million), and the Ministry of Foreign and European Affairs contributed EUR 1.6 million (CAD 2.4 million).[23] These funds are primarily allocated to cover the operational and administrative costs of the Paris office and its activities. The ECFs are primarily funded by the French embassies in each country whose authority they are under.

[22] Source: CampusFrance website.
[23] Source: CampusFrance Activity Report 2008, French Senate.

## France – Basic Statistics

| | |
|---|---|
| Total population (2007) | 61,647,375 |
| GDP (2006) | EUR 1,792.0 b |
| GDP per capita (PPP) (2006) | USD 31,992 |
| Total number of students enrolled in tertiary education (2007) | 2,179,505 |
| Total number of outbound mobile students (2007) | 54,021 |
| Total number of international students in France's higher education institutions (2008) | 260,596 |
| International students as a percentage of all tertiary enrolment (2006) | 11.2% |
| Total number of (public) universities | 87 |
| Total number of Grandes Écoles | 218 |

Sources: CampusFrance, Conference des Grand Écoles, French Ministry of Higher Education and Research, OECD, UIS.

## 3.4 Germany

### International Education Marketing and Recruitment Trends

#### Introduction

Understanding the international education marketing landscape in Germany requires a brief look back in time. Germany had long been a science and research powerhouse. Well into the 1930s, Germany's universities won the lion's share of Noble Prizes. Their organizational design and learning and teaching concepts (propagated by Wilhelm von Humboldt) were advanced enough to give rise to such as institutions as Johns Hopkins University in the US.

By 2008, only traces of this glory remained. German universities never recovered from the dual devastation caused by the Nazi regime and World War II. Even after Germany's reunification in 1989, universities remained deeply tied into a public welfare policy model which prevented the introduction of actual tuition fees until 2006.

By the beginning 2009, the highest tuition amount a public German university could charge stood at Euro 1,000 per academic year (CAD 1,550). As a result, international student recruiting does not serve as an income-generating function for German universities[24].

At the same time, Germany has been uniquely generous with funding international students' studies in Germany through a variety of scholarships and grants. The DAAD alone has made funds available to 690,000 international students and researchers since 1950. A long standing focus of these funding mechanisms was on recruiting students from economically less developed nations.

The result of these three factors – financially emasculated universities, historic public diplomacy-based recruiting policies, and the dominant role of non-university organizations in positioning German science and research abroad – is that German universities have been effectively absent from the international student marketing landscape until recently.

Thus, it is not surprising that international education marketing practices of German higher education institutions lag best practices by a decade or more. For example, many universities still struggle with basic tasks such

[24] Some universities have attempted to defray the costs of managing international student services through add-on fees running at a few hundred Euro per annum.

as properly translating their website into English, or offering any professional collateral such as an annual report or course catalogue in electronic formats. Most International Offices do not have a dedicated marketing unit, and often not a single staff member with experience in international education marketing.

This goes not to say that more initiatives, training, missions, and fair participation are not taking place. International marketing has indeed been recognized as a competition issue, funding has been made available through organizations such as GATE Germany and the DAAD itself, and a few universities have made progress. Yet the overall level of proficiency remains low. This is probably best demonstrated by the fact the half of the liaison offices German universities opened in New York under the tutelage of the DAAD in 2006 had been closed down by the fall of 2009.

It should be noted that many German universities have little incentive to notably improve their international marketing proficiency since marketing efforts are effectively de-coupled from income generation. As long as Germany's policy-makers do not allow for full cost models to be applied to international students this is unlikely to change, and German universities' competitiveness for top talent or students from key emerging source countries such as India will remain limited.

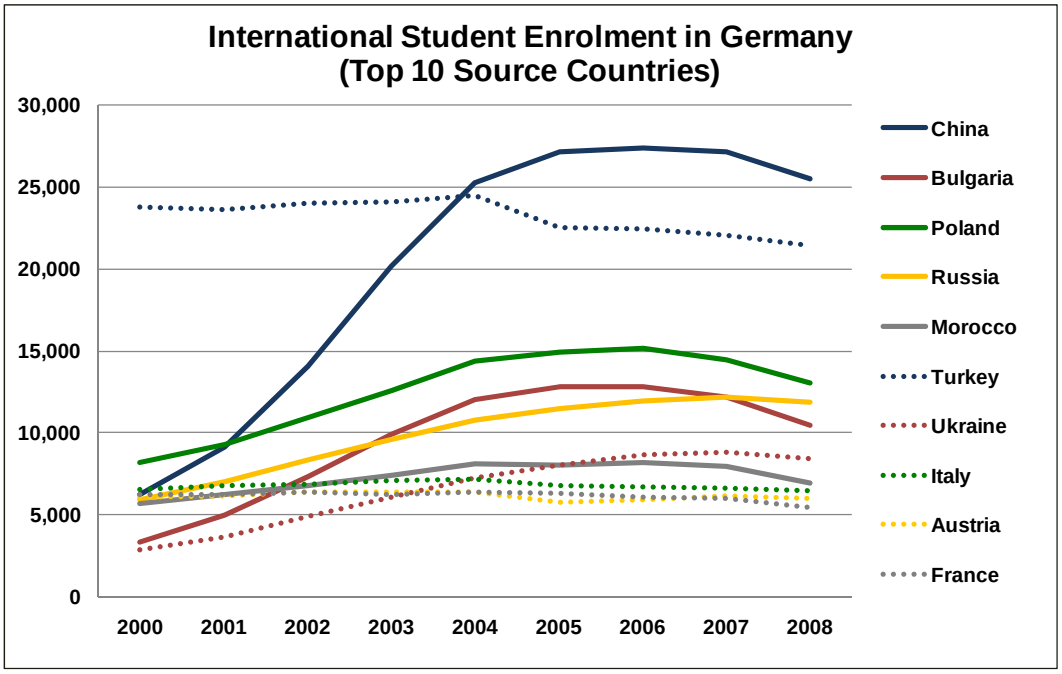
## International Higher Education Student Enrolment Trends

Between 2000 and 2008, international higher education student enrolment in Germany increased from 175,065 to 233,606[25]. This increase, as the below graph shows, was largely driven by rising enrolment of students from five leading source countries: China (from 6,256 to 25,479), Poland (from 8,181 to 13,028), Russia (from 5,946 to 11,847), Bulgaria (from 3,307 to 10,504), and the Ukraine (from 2,836 to 8,408). These five countries were responsible for 73.0% of all enrolment gains since 2000.

The remaining leading sending countries in 2008 were Turkey with 21,404 enrolments, Morocco with 6,918 enrolments, Italy with 6,512 enrolments, Austria with 6,018 enrolments, and France with 5,476 enrolments.

[25] Importantly, the following discussion is based on a combination of *Bildungsinländer* and *Bildungsausländer* students. Especially in the case of Turkey, this means that non-German citizens who reside in Germany – and might have resided for generations – are being counted as international students. In 2008, this applied to about two-thirds of Turkish students participating in German higher education. Nonetheless, this accounting method is appropriate since other countries define an international student as a student holding a different nationality rather than by residence.

International Higher Education Student Enrolment in Germany by Top 10 Source Countries (Total, 2000-08)




Notes: See Appendix.
Source: DAAD/HIS.

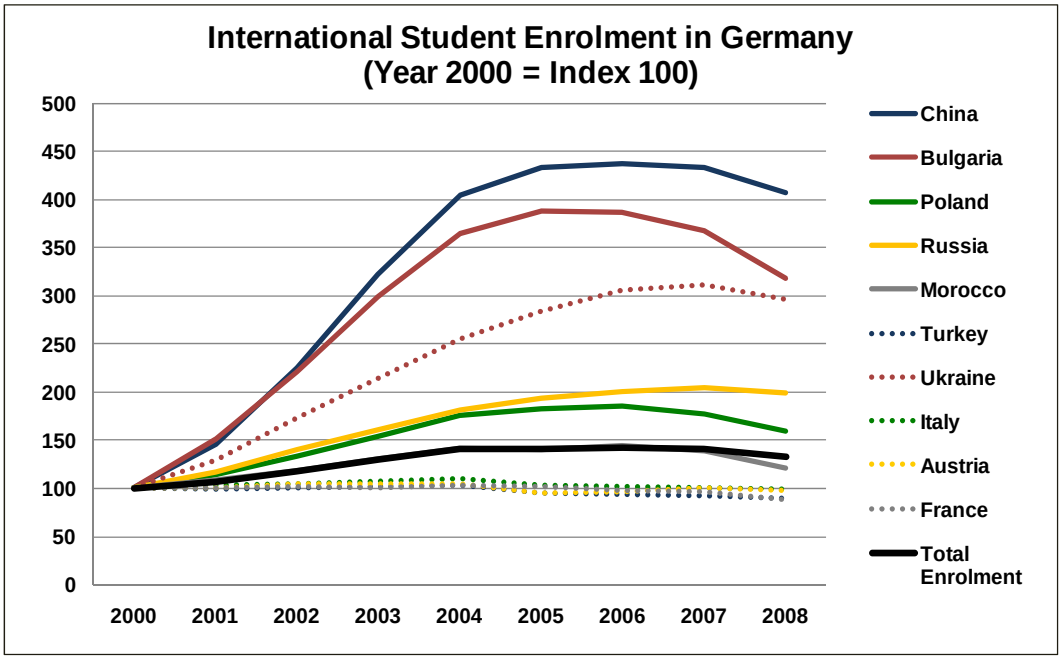
Germany's top ten enrolment sources are spread widely geographically. Four are located in Eastern Europe, three in Western Europe, two in the MENA region, and only one is located in Asia. As noted, caution should be applied when interpreting the figures of countries with a strong workplace immigration background. Both Turkish students (about two-thirds) and Italian students (about half) often have been raised in Germany.

Year-over-year growth trends as displayed in the below graph show three distinct patterns. On a meta level, enrolments grew steadily until 2004. Starting in 2004, enrolment growth evaporated and turned negative in 2006.

Second, regional saturation patterns can be discerned. Enrolments from Western European source countries peaked in 2003 and 2004 and then started to slide. Enrolments from Eastern European source countries reached their high points in 2005 to 2007 and then started to recede as well.

Third, enrolments from Chinese students showed a clearly decelerating growth dynamic after 2004 and a decline in overall enrolments starting in 2007. This stands in marked contrast to, for example, the Australian experience.

## International Higher Education Student Enrolment in Germany by Top 10 Source Countries (YoY Growth, 2001-08)




Notes: See Appendix.
Source: DAAD/HIS.

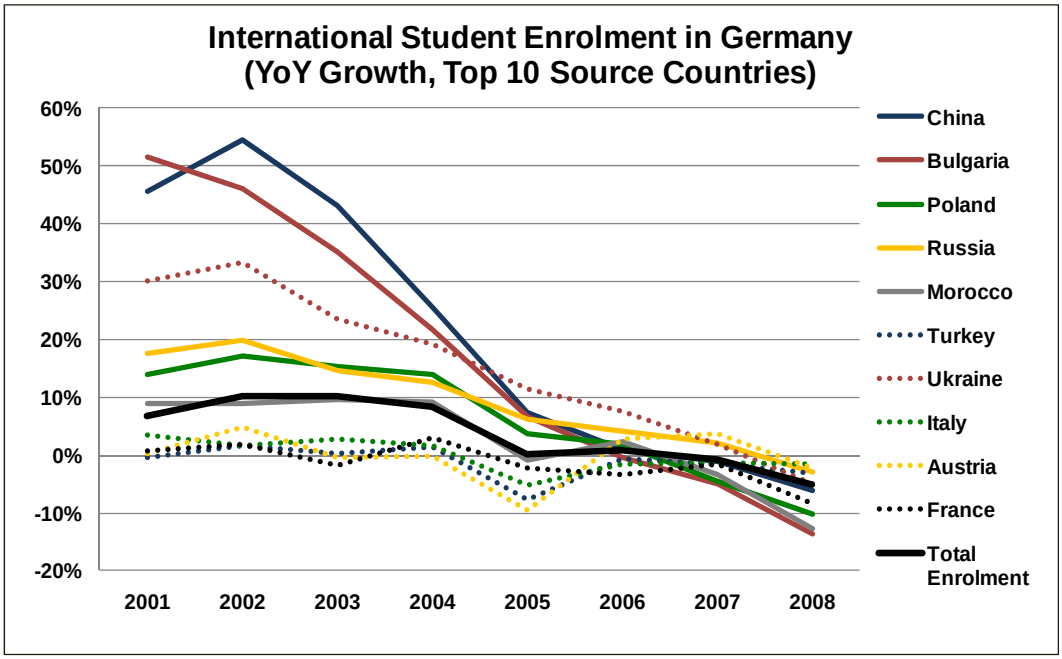
Year-over-year enrolment growth trend analysis for Germany evidences an unusual dynamic – since 2002, overall enrolment growth has declined more or less consistently from 10.2% (2002) to -5.2% (2008). In 2008, all top ten sending countries enroled fewer students in Germany than in 2007.

This decline pattern, however, is not a one-off "fluke". It is preceded by years of negative growth patterns. In 2005, five of the top ten 2008 enrolment countries already showed negative growth. In 2007, six did. On a technical analysis level this suggests that Germany's enrolment performance trajectory cannot be easily reversed, especially since enrolments are a trailing indicator.

What also stands out is the severity of the 2008 decline. Three countries saw enrolment declines of more than 10%: Bulgaria (-13.7%), Morocco (-12.8%), and Poland (-10.1%). Since 2008 data reflect the 2007/08 academic year, therefore the global financial crisis is not a reason for these trends.

The 6.0% decline in 2008 enrolments of Chinese students is especially noteworthy since it contrasts with the corresponding, positive growth enrolment trends in Australia, Canada, France, New Zealand, and the US.

International Higher Education Student Enrolment in Germany by Top 10 Source Countries (YoY Growth, 2001-08)




Notes: See Appendix.
Source: DAAD/HIS.

## Germany's International Education Marketing Landscape

The main Federal agency involved in Germany's higher education landscape is the German Federal Ministry of Education and Research (BMBF). While the BMBF's portfolio extends beyond international education marketing, the Ministry plays a critical role in awarding scholarships, funding research, as well as promoting international exchanges in vocational training, secondary and higher education and research.

Its internationalization strategy has four main goals: Strengthen research cooperation with global leaders; increase Germany's attractiveness as an environment for innovation; intensify collaboration with developing countries in education, research and development; and utilize Germany's research and innovation landscape to contribute to the solution of global challenges.

To achieve these goals, the BMBF funds a multitude of programs which are often carried out by intermediary organizations such as the German Academic Exchange Service (DAAD), or the Alexander von Humboldt Foundation, both in Germany and abroad. These programs encompass a range of activities from student exchanges to summer schools to research

fellowships and other outreach efforts to the provision of German educational services abroad.

The BMBF is organized into eight Directorates-General (DG). With regard to international education marketing, two DGs are of particular relevance: The DG Science Systems, which oversees the Institutions of Higher Education Directorate, and DG European and International Cooperation for Education and Research.

The Institutions of Higher Education Directorate is in charge of the BMBF's central tasks in higher education policy, the Excellence Initiative, the promotion of international exchanges, need-based student stipends, and continuing education at higher education institutions.

The DG European and International Cooperation for Education and Research is responsible for the development of international relations in education and research, covering all areas from Europe to fostering worldwide bilateral relations, to representation in multilateral bodies such as the G8, OECD and UN structures.

These two DGs set the framework conditions for international education marketing; however, other DGs also have an impact. One such DG is the DG Life Sciences, which provides large-scale research funding for projects carried out by organizations such as the Max Planck Society, which helps to attract talented researchers from abroad.

The BMBF employs more than 900 staff members in its Berlin and Bonn offices, and has EUR 10.2 billion (CAD 15.7 billion) allocated as its budget for 2009.[26]

The most visible player in Germany's international higher education sector, however, is the German Academic Exchange Service (DAAD), a Bonn-headquartered international education organization representing Germany's higher education landscape (for an organizational capsule see below).

Apart from the BMBF and DAAD, other relevant organizations include:

- The Goethe Institut, which is supported by the Foreign Office and is Germany's primary cultural ambassador abroad.
- The Alexander von Humboldt Foundation, an intermediary organization for German foreign cultural and educational policy which is mainly funded by the German federal government.

[26] Source: BMBF Eckdaten zum Haushalt 2009.

- The German Research Foundation (DFG), Germany's central public research funding organization.
- The Fraunhofer Gesellschaft, the largest organization for applied research in Europe.
- The Helmholtz Association, Germany's largest scientific research organization.
- The Max Planck Society, one of the world's leading basic research organizations whose researchers have won multiple Noble Prizes.

### Organizational Capsule: German Academic Exchange Service (DAAD)

The DAAD's membership comprises all institutions of higher education represented in the German Rectors' Conference (HRK), and their student bodies. Membership currently stands at 229 higher education institutions and 125 student bodies.

The DAAD also acts as a mediator between various federal ministries, between higher education institutions and the German states (which provide large parts of higher education institutions' funding), and between the realms of academia and politics.

The main responsibilities of the DAAD lie in promoting international academic relations, primarily through the exchange of students, interns and researchers, as well as raising the international profile of German higher education. Since its establishment in 1950, the DAAD has provided funds to more than 1.5 million exchange students and researchers, and is responsible for more than 200 international education programs ranging from short-term research grants to doctoral scholarships.

These programs fall into the DAAD's five strategy areas: Scholarships for incoming talent; scholarships for outgoing Germans; programs to promote Germany as a leading destination for higher education and research; programs to promote German studies and the German language; and education cooperation activities with developing countries. The DAAD's programs are primarily funded by the EU and the German government; in particular by the BMBF, the German Foreign Office, and the Federal Ministry for Economic Cooperation and Development (BMZ).

Beyond its programs, the DAAD supports the international activities of German higher education institutions by offering information and publication programs, marketing, consulting and support services, as well as programs aimed at raising the international profile of German higher education. It also

plays an advisory role in guiding German foreign cultural and education policy, national higher education policy and development policy.

Despite an annual output of more than 750,000 printed copies of DAAD publications, the organization places primary emphasis on communicating via the internet. Through its website, the DAAD provides resources both for German and international students, including information on scholarship opportunities, assistance for planning one's studies, apartment and job searches, language training, and legal advice.

It also provides resources for organizations, such as information on partnering with German universities, the ongoing internationalization of German universities, and the details of the DAAD's engagement with developing countries.

In 2001, the DAAD, in collaboration with HRK, launched the GATE Germany program, aimed at attracting international high potentials to German universities and research institutions. GATE Germany markets the study and research programs offered by 112 German higher education and research institutions, through various international marketing initiatives (education fairs, promotion tours, media campaigns, etc.)

GATE Germany offers specialized training for marketing officers from German universities as well as a wide range of collateral in the form of print publications, CDs and websites. Its mission is to position German science, education and research in the international market. Its work is advised by five committees, whose chairs form a steering committee. The DAAD's Vice-President acts as chair. GATE Germany campaigns are funded by the BMBF.

The DAAD employs 271 full-time staff members at its Bonn Headquarters, its Berlin Office and its Regional Offices abroad. In addition to full-time staff, 378 staff members hold project and contract-funded positions. Moreover, the DAAD has appointed 472 academic lecturers which represent the DAAD in a side capacity.

The DAAD runs 14 Regional Offices and 49 Information Centres on six continents. Some regional office have built up sizable presences. For example, the New York office has thirteen staff members, and the London office has seven staff members.

Regional Offices have become more active in utilizing social media platforms to inform international talents about DAAD programs, albeit with modest success. For example, created in July 2007, the New York Office's YouTube Channel now features 43 videos, including student testimonials and videos on

studying abroad in Germany. The New York Office's official Facebook Group has drawn a little more than 850 members.

In 2008, the DAAD received EUR 303.9 million (CAD 467.4 million) in total program funding. On a national level, EUR 120.1 million was made available by the German Federal Foreign Office, EUR 64.7 million by the German Federal Ministry of Education and Research, EUR 26.4 million by the Federal Ministry for Economic Cooperation and Development, and EUR 21.0 million by other sources, including the *Länder*. The European Union contributed EUR 50.6 million. The DAAD's salary and operating costs of EUR 21.1 million (CAD 32.5 million) are separately covered by the German Federal Foreign Office.

## Germany: Basic Statistics

| | |
|---|---|
| Total population (2007) | 82,599,471 |
| GDP (2006) | EUR 2,309.1 b |
| GDP per capita (PPP) (2006) | USD 32,322 |
| Total number of students enrolled in post secondary non-tertiary (2007) | 540,871 |
| Total number of students enrolled in tertiary education (2007) [27] | 2,278,897 |
| Total number of outbound mobile students (2007) | 77,534 |
| Total number of international students in German higher education institutions (2008) | 233,606 |
| International students as a percentage of all tertiary enrolment (2006) | 11.4% |
| Total number of higher education institutions (2008-9) | 394 |
| Universities | 104 |
| Colleges of education | 6 |
| Colleges of theology | 14 |
| Colleges of art and music | 51 |
| Specialised colleges of higher education | 189 |
| Colleges of public administration | 30 |

Sources: OECD, Statistisches Bundesamt, UIS, Wissenschaft Weltoffen.

[27] Excludes ISCED level 6 (doctoral).

## 3.5 New Zealand

### International Education Marketing and Recruitment Trends

New Zealand is widely believed to "punch above its weight" with regards to recruiting international students. Given its small population size this is certainly true: In 2008, a population of 4.2 million hosted 31,600 international (higher education) students[28]. In comparison, Germany would have to enrol around 621,000 international students (2008 actual: about 234,000), and the US would have to enrol 2.3 m international students (2008 actual: about 624,000) to have the same ratio of international students to population size.

New Zealand's success in attracting international students across all sectors has been based on three factors: First, New Zealand's education systems are of high quality. In the 2006 PISA survey, New Zealand was ranked 5th in reading, 7th in the sciences, and 11th in mathematics. At the university level, in 2008, five of New Zealand's eight universities were ranked in the Top 500 Shanghai Jiao Tong Academic Ranking of World Universities.

Second, New Zealand has successfully positioned itself as an exotic but safe, environmentally-focused but technologically savvy, native English-speaking, and genuinely welcoming study destination. As such, New Zealand education providers profit from a very positive country brand.

Third, New Zealand has benefited from a proficient international education marketing support landscape. With ENZ being in charge of marketing tasks and the Ministry of Education funding supporting measures, the number of potentially conflicting stakeholders is small. Institutional leadership in the higher education sector with just eight universities and 18 Institutes of Technology and Polytechnics is familiar with each other and in frequent contact. As a result, in international comparison, marketing is both efficient and effective.

There are reasons for concern, however. For one, institutions have consistently failed to invest into critical infrastructure such as high quality websites, online application systems, or proficient international alumni networks. This has especially hampered efforts aimed at pro-active as well as long-term recruiting funnel building. Another concern is that New Zealand's geographical remoteness will become a competitive disadvantage should air travel costs increase notably.

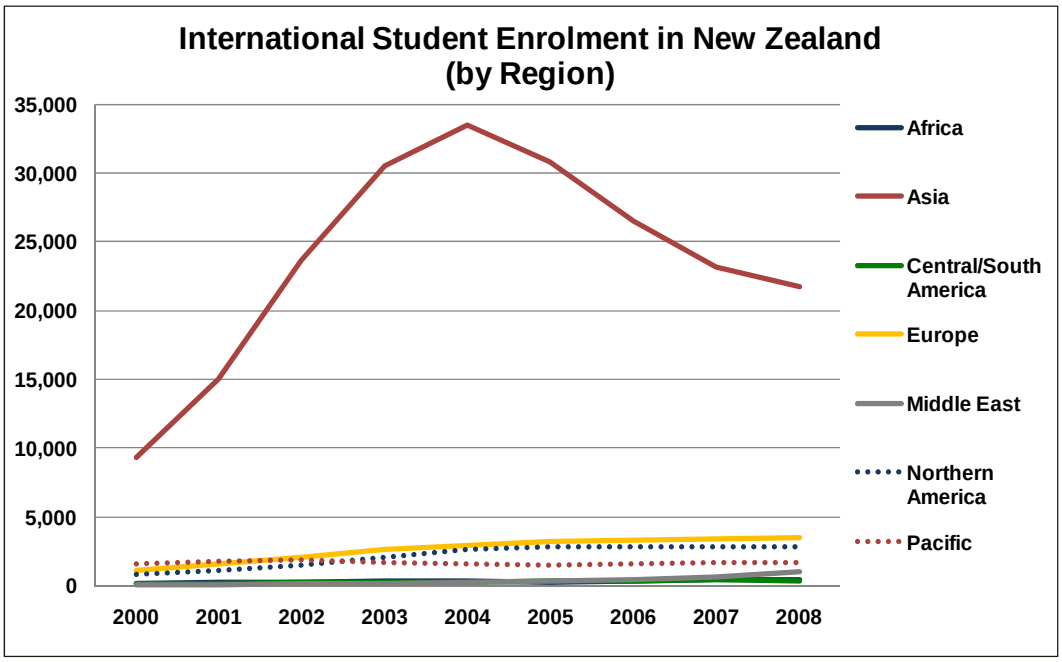
[28] Enrolment numbers are based on a narrow definition and only include students in public higher education institutions. Commonly discussed enrolment figures for New Zealand are based on a much broader definition, including both public as well as private tertiary providers. Owing to dataset time series limitations, only regional data were comparable over the 2000 to 2008 time period.

## International Higher Education Student Enrolment Trends

Between 2000 and 2008, international higher education student enrolment in New Zealand increased from 13,246 to 31,620. As the below graph highlights, more than 60% of this increase of 18,374 students, was driven by an increase of 12,357 students from Asia (essentially China).

Enrolments from Europe increased by 2,398 students, while enrolments from North America increased by 2002 students. Student numbers from the Middle East began to surge in 2007, accounting for a gain of 1,000 enrolments. In contrast, student enrolments from Africa gained just 325, from Central and South America 2017, and from the Pacific Region 84, respectively.

### International Higher Education Student Enrolment in New Zealand by Source Region (Total, 2000-08)



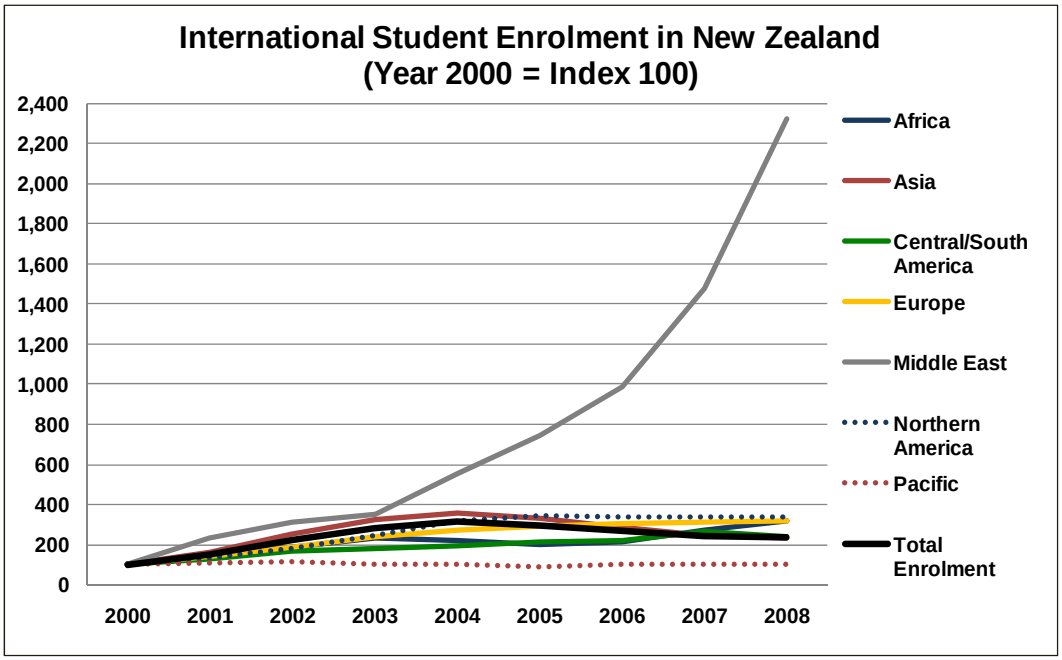

Notes: See Appendix.
Source: New Zealand Ministry of Education.

New Zealand's international student enrolment is well known for its volatility. Between 2000 and 2004, total enrolments more than tripled from 13,246 to 41,554, only to fall back to 31,620 in 2008. This volatility is due to New Zealand's dependence on Asia (mostly China) which accounted for as much as 81.1% of total enrolments during this time period.

An analysis of index-based growth dynamics, as displayed in the below graph, shows three distinct patterns. Regions such as Africa, Central and South America, as well as Europe experienced relatively smooth enrolment increases between 2000 and 2008. North American enrolments initially gained smoothly until 2005 and have since then flat-lined.

In contrast, enrolments from Asia increased by a factor of nearly 3.6 between 2000 and 2004 only to slide back since. An exceptional story is the enrolments from the Middle East which increased by a factor of 23.2 in eight years time (albeit from a very small numerical base). Accelerated growth commenced in 2003 which was a direct consequence of the post-9/11 situation for many students from the Middle East.

### International Higher Education Student Enrolment in New Zealand by Source Region (Index, 2001-08)



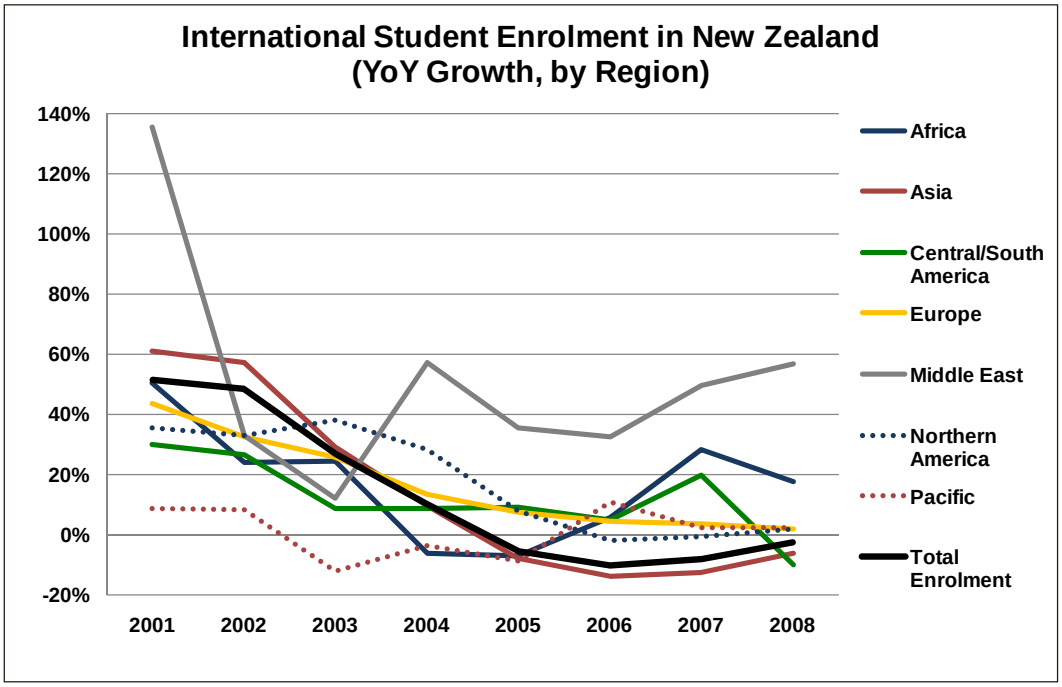

Notes: See Appendix.
Source: New Zealand Ministry of Education.

New Zealand proved again to be a highly volatile with regards to enrolment dynamics as evidenced by the year-over-year enrolment growth trend analysis displayed in the below graph. Changes in growth rates, when measured for their largest year-over-year swing, ranged from a gain of 103% (Middle East) to a decline of -30% (Africa, Central and South America) and -28% (Asia). Other regions exhibited smaller annual growth rate swings, ranging from -13% (Europe) to -20% (North America, Pacific).

Another observation is that regional enrolment dynamics differ not only on a year-over-year basis, but also have very little in common: In recent years, annual variations for Europe, North America, and the Pacific Region have been quite small, hinting at stable, more long-term recruiting approaches.

In contrast, sending regions such as Africa, Central and South America, as well as the Middle East experienced high year-over-year fluctuation patterns. Asia, which by virtue of its overall enrolment figures heavily influences the average trend line, has seen relatively long-term trend patterns, with a decline pattern from 2001 to 2006 and a recovery pattern since. There is no question that international student recruiting in New Zealand faces substantial technical challenges.

### International Higher Education Student Enrolment in New Zealand by Source Region (YoY Growth, 2001-08)




Notes: See Appendix.
Source: New Zealand Ministry of Education.

## New Zealand's International Education Marketing Landscape

In New Zealand, the government entity most involved in international higher education is the Ministry of Education, which advises the New Zealand government on the country's education system. In addition to implementing policies and programs aiming to fulfil the government's educational goals, the Ministry is also responsible for managing all education property owned by the Crown, and the professional development of teachers and education administrators.

The International Education division of the Ministry of Education comprises a policy and liaison team based in Wellington, as well as eight education counsellors based internationally in China, Malaysia, India, Belgium, Chile, Korea and the United States. The counsellors do not engage in direct marketing and recruiting. Rather, they are meant to build long-term diplomatic relationships with governments, educational policy bodies and key sector groups. Meanwhile, the domestic team develops the country's educational policy, gearing it toward greater internationalization.

The Ministry charges two levies on the international education sector. One is the Export Education Levy (EEL), which is a compulsory levy collected from all education providers that enrol fee-paying international students. It comprises a flat fee of NZD 185 (CAD 132) and 0.45% of tuition fee income and is administered by the Ministry.

Education New Zealand (ENZ) holds an annual contract with the Ministry to manage aspects of EEL programs, covering research, professional development, and marketing promotions to support international education. Income from EEL in 2007-8 was NZD 2.9 million (CAD 2.0 million).

The second levy is the International Student Levy (ISL), which is only levied on state schools. It is deducted from their operating grants on the basis of their roll returns on international student enrolments. ISL funds are used to reimburse the New Zealand government for the costs of enrolling international students in state schools, such as the cost of providing ESL assistance and external reviews of international programs. The current ISL rate is NZD 900 (CAD 641), but will be reduced to NZD 420 (CAD 299) in 2010.

For 2009-10, the New Zealand government's expenditure on international education programs is NZD 7.4 million (CAD 5.3 million). Of this amount, international education promotion accounts for NZD 3.5 million (CAD 2.5 million). The latter figure comprises the government's usual baseline contribution of NZD 1.5 million (CAD 1.0 million), and an approved increment contribution for 2009 of NZD 2.0 million (CAD 1.4 million). In addition to this total government funding for education promotions, EEL funds provide NZD 1.0 million (CAD 0.7 million), bringing the total funding for education promotion programs to NZD 4.5 million (CAD 3.7 million).

This increase in funding goes hand in hand with the Ministry's International Education Agenda 2007-2012, a five-year plan to more fully integrate New Zealand into the global economy through international education. The agenda sets out four goals: To equip New Zealand students with the global skills they need in an international landscape, to enrich international student experiences in New Zealand, to strengthen domestic education providers through international linkages, and to gain economic and social benefits for New Zealand through internationalization.

In addition, the government developed a specific Education Strategy for its India 2006-2009 agenda, a three-year plan to strengthen New Zealand's education relationship with India, in accordance with the government's greater foreign trade policies. It also reflects the steady increase of Indian students studying in New Zealand in long-term courses.

Apart from the Ministry, the two other key players in New Zealand's higher education marketing landscape are Education New Zealand (ENZ), the umbrella body for the country's export education institutions (for an organizational capsule see below), and the New Zealand Vice-Chancellors' Committee (NZVCC).

The NZVCC is a statutory entity that represents New Zealand's universities through the membership of each university's Vice-Chancellor. The Committee acts as an interface between New Zealand's government and the country's universities, overseeing the quality of university programs. It convenes on a formal basis six times a year, with the position of committee chair rotating every two years. The NZVCC employs ten administrative staff.

One sub-committee of the NZVCC that is involved in international education is the Committee on International Policy. This sub-committee considers broad strategy and policy affairs in the internationalization of higher education, and advises the NZVCC and New Zealand government on these issues.

## Organizational capsule: Education New Zealand

ENZ is a non-profit charitable trust, which the New Zealand government recognizes as the umbrella body for the country's export education institutions. Unlike other organizations such as New Zealand Education International Ltd. (NZEIL), it is not a membership-based club, but rather a pan-industry association. ENZ was established in 1999, and was formally recognized by the government as the official industry body in 2004.

ENZ is responsible for promoting New Zealand in international student recruitment activities and developing the country's export education industry. In this capacity, it has entered into formal partnerships with the New Zealand Ministry of Education and New Zealand Trade and Enterprise, the government's national economic development agency.

One of the marketing activities ENZ supports is the New Zealand International Education Conference. The conference has run for the past 18 years and attendance has grown from an original 100 to more than 400 delegates. The conference aims to foster discussion, as well as learning and networking between New Zealand education institutions. Since 2004, ENZ has also implemented the International Education Excellence Awards, which are awarded in the categories Marketing, Student Support, and Innovation in International Programmes.

The PACE marketing program is another of ENZ's key initiatives. PACE stands for the Promotional Activity Calendar for Education, and is developed on an annual and national basis after consultation with key industry players. PACE events largely consist of New Zealand Education Fairs in key markets abroad. 2009 fairs are scheduled in China, Kazakhstan, Korea, Malaysia, and Sri Lanka. Other locations

have included India, Hong Kong, Japan, Russia, South America, Taiwan, Thailand, the Netherlands and Vietnam.

ENZ manages the *New Zealand Educated* brand. Established between 1999 and 2004, it has served as the unified international marketing strategy for New Zealand, conceived and established by a combination of private sector and government bodies. ENZ took over management, development and funding of the brand in July 2004.

ENZ allows New Zealand institutions to use the brand for their own marketing efforts, free of charge. The brand harnesses seven attributes intended to capture the essence of New Zealand's lifestyle and education system: Adventurous, Lively, Personal, Welcoming, Inventive, Trusted, Connected. Its student website, launched in 2007, details study and living options in New Zealand[29]. It uses a range of Web 2.0 tools such as blogging, interactive flash simulations and user feedback, and also has an associated Facebook group with more than 790 fans.

ENZ also administers a Specialist Agents Program, which it developed in 2008. This is a training program meant to increase the effectiveness of agents promoting New Zealand education, as well as to identify credible agents through agent certification. ENZ has developed Specialist Agent groups based in foreign markets, including Brazil, India, Hong Kong, China, Korea, Thailand and Japan, as well as groups based in New Zealand.

Despite the large range of the association's functions and activities, the total staff headcount of ENZ is small at eleven people. Ten of these staff members work at the head office in Wellington. Together they comprise a Chief Executive, an Industry Development Manager, a Strategic Promotions Manager, a Scholarships Manager, a Finance & Office Manager, a Communications Specialist, a Website Manager, a Project Manager, a Project Coordinator, and a Frontline Administrator. The eleventh staff member works at ENZ's only other wholly-owned office, in Bangkok, Thailand.

In addition to these two wholly-owned offices, ENZ has a partnership with New Zealand Trade and Enterprise (NZTE) which grants access to one NZTE staff member in each of eight NZTE posts abroad, in Los Angeles, Sao Paolo, Beijing, Ho Chin Minh City, Hamburg, Kuala Lumpur, and New Delhi. These staff members are salaried by NZTE but tasked by ENZ, and carry out activities using funds that ENZ allocates to them.

Budgetary information for ENZ is not publicly available. ENZ holds an annual contract with the New Zealand Ministry of Education to manage the Export Education Levy money collected from schools. The total levy collected in 2008 was NZD 2.9 million (CAD 2.0 million), which makes up a part of ENZ's budget.

It should be emphasized that this figure does not include other special project funds that are made available to ENZ by the New Zealand government, any other project funding, and the value of the NZTE staff members. Preliminary data for 2009 levy figures indicate that the total levy collected in 2009 should exceed NZD 3.0 million (CAD 2.1 million).

[29] See www.newzealandeducated.com.

## New Zealand: Basic Statistics

| | |
|---|---|
| Total population (2007) | 4,178,525 |
| GDP (2006) | NZD 161.0 b |
| GDP per capita (PPP) (2006) | USD 25,517 |
| Total number of students enrolled in post secondary non-tertiary (2007) | 62,113 |
| Total number of students enrolled in tertiary education (2007) | 242,651 |
| Total number of outbound mobile students (2007) | 4,104 |
| Total number of international students in New Zealand higher education institutions (2008) | 31,620 |
| International students as a percentage of all tertiary enrolment (2007) | 13.6% |
| Total number of universities | 8 |
| Total number of polytechnics | 18 |

Sources: New Zealand Ministry of Education, New Zealand Vice-Chancellors' Committee, New Zealand Qualifications Authority, OECD, UIS.

## 3.6 United Kingdom

### International Education Marketing and Recruitment Trends

#### Introduction

The UK is firmly entrenched as the second most popular destination for international higher education students behind the US. Since 2000, the UK has managed to keep up with total US enrolment growth (from a smaller base), while keeping Australia at bay. The UK has gained ground on other competitors: In 2000 the UK enroled about 50,000 more international students than Germany did. By 2008, the enrolment gap had grown to more than 108,000 students.

There are multiple reasons for the success of the UK which in combination have created arguably the most well balanced, organic recruiting portfolio of any country which actively pursues international students.

For one, the UK taps deeply into multiple, distinct recruiting meta markets. These include the Commonwealth (mostly former colonies and territories) with its cultural, linguistics, and often close economic and political linkages to the UK. The Commonwealth currently has a membership of 53 sovereign states with a combined population of 1.97 billion.

Another meta market are European Union member countries. Owing to the fact that EU students are only liable to pay domestic tuition fees, the UK offers a very reasonable alternative to higher cost destinations such as Australia and the US. The UK is also not only easily accessible but also very cheaply reached owing to a proliferation of low cost airlines[30].

Other factors driving the success of UK international education include a sophisticated marketing landscape. This landscape includes agencies such as the British Council and Universities UK (International Unit). The latter is a leader in intelligence gathering and analysis, while the British Council has created an unparalleled global footprint. The British Council has run a number of very successful specific promotion campaigns such as PMI and PMI2.

Many UK universities have developed high quality student marketing practices which may not rival Australian peers in sheer size and budget levels, but which are nonetheless effective. Leaders include Westminster

[30] Despite the recent increase in air travel costs, it is still possible to find flights from continental Europe to the UK for less than CAD 50 one way.

University and the London School of Economics (LSE). International students at the LSE account for more than two-thirds of enrolments.

In addition, factors such as the UK being seen as the cradle of the English language, work and immigration opportunities (now much diminished), a good number of internationally present alumni networks, and more generous funding opportunities than Australia or New Zealand relatively offer, all contribute to the UK's overall international positioning.

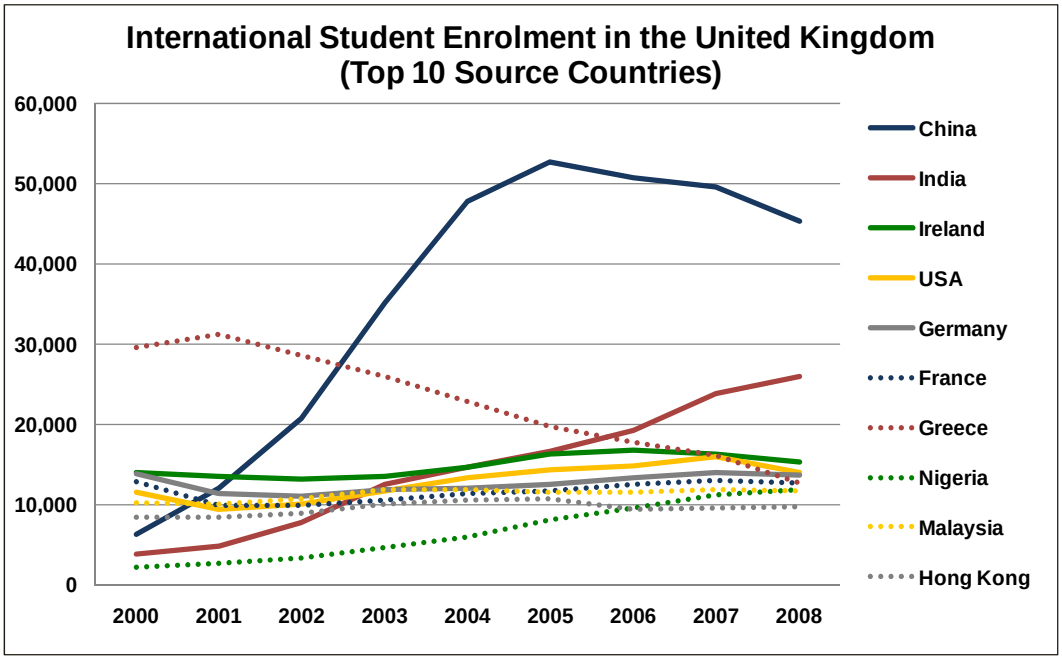
## International Higher Education Student Enrolment Trends

Between 2000 and 2008, international higher education student enrolment in the UK increased from 224,660 to 341,795. This growth was primarily rooted in the rising enrolment of students from three countries: China (from 6,310 to 45,355), India (from 3,760 to 25,905) and Nigeria (from 2,120 to 11,785). These source countries accounted for 60.5% of total enrolment gains.

The remaining leading source countries in 2008 were Ireland with 15,260 enrolments (up from 13,390), the United States with 13,905 enrolments (up from 11,470), Germany with 13,625 enrolments (flat from 13,750), France with 12,685 enrolments (flat from 12,910), Greece with 12,623 enrolments (significantly down from 29,580), Malaysia with 11,730 enrolments (up from 10,140), and Hong Kong with 9,700 enrolments (up from 8,380).

The fact that the top three sending countries (China, India, Ireland) combined for just 25.3% of all enrolments in 2008, and the top ten sending countries for just over half of enrolments (50.5%), points to the relatively diversified nature of the UK's international student intake.

International Higher Education Student Enrolment in the United Kingdom by Top 10 Source Countries (Total, 2000-08)




Notes: See Appendix.
Source: HESA.

The index-based graph below further highlights the uniquely diversified nature of the UK international student intake. The top ten intake countries, despite the appearance of just two growth performance clusters, can actually be categorized into five market segments.

First, major sending countries. These are China, India (and South Korea). Enrolments of Chinese students have increased by a factor of 7.2 after having hit a peak in 2005. Enrolments from India have shown a more steady growth dynamic and risen by a factor of 6.9.

Second, traditional medium-sized sending countries, namely Hong Kong and Malaysia. Students from these countries accessed UK higher education at slightly higher rates in 2008 when compared to 2000. Given that enrolments from these countries begun to decline a decade ago in other receiving countries this is a sign of recruiting strength.

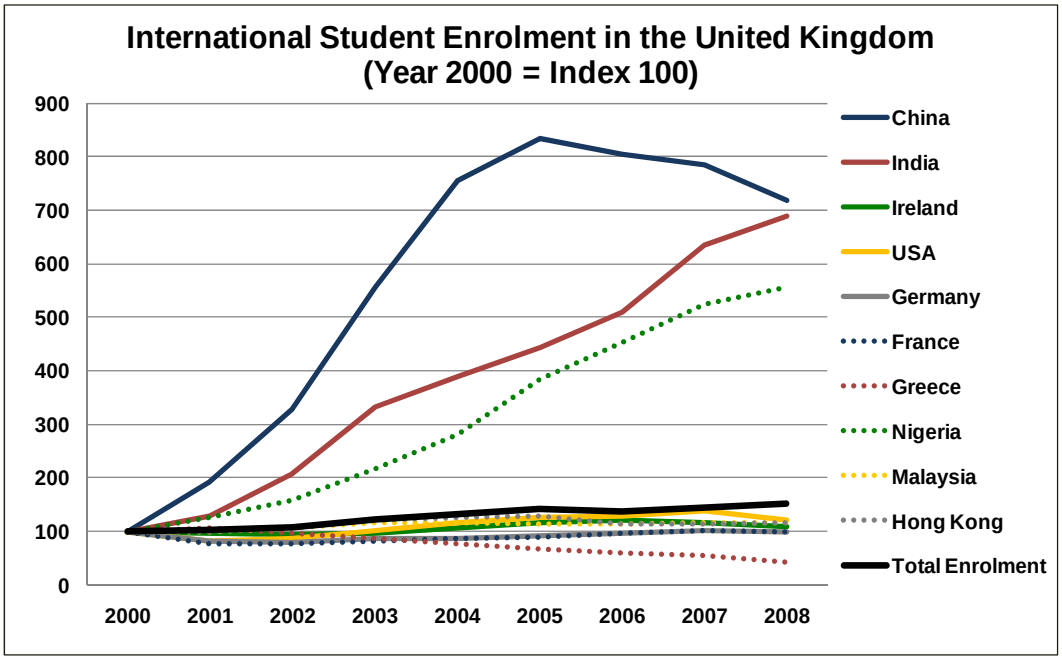
Third, peer countries. In this case, enrolments from France and Germany were effectively flat over time. This is not atypical for countries with well established educational linkages and a high degree of exchange program-driven mobility.

Fourth, special relationship countries. For the UK, this entails Greece, Ireland, and the US. A special relationship in itself does not guarantee any specific impact on recruiting dynamics. In these three cases, enrolments form Ireland and the US have moderately grown while enrolments from Greece have declined by 57%.

Fifth, Commonwealth countries. Nigeria has been a strongly growing sending country both in the case of the UK and the US. This is largely underpinned by the increase in revenues from oil production in Nigeria on the one hand and the continued dysfunction of Nigeria's higher education system on the other.

Overall, UK long-tern enrolment patterns are robust with only one out of the top ten sending countries showing a notable decline. Four countries show moderate and another three countries show very strong, sustained growth patterns.

**International Higher Education Student Enrolment in the United Kingdom by Top 10 Source Countries (Index, 2000-08)**




Notes: See Appendix.
Source: HESA.

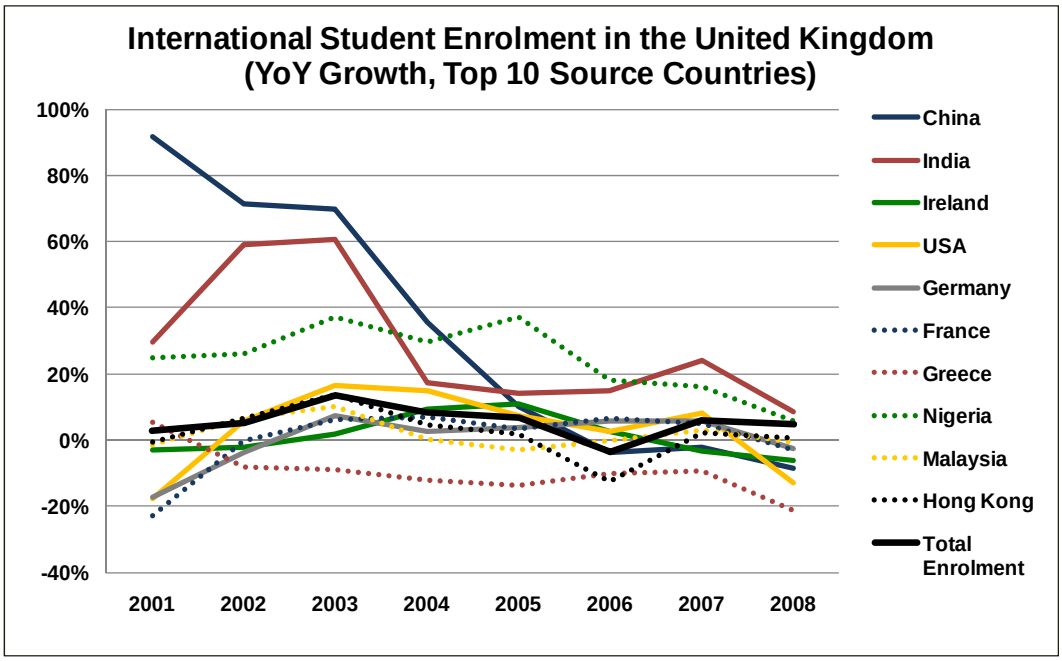
An analysis of the UK's year-over-year growth dynamics yields a distinct marketing and recruiting storyline. The UK effectively managed to maintain a relatively steady, organic growth trajectory of around 5%

(annualized). Deviations from this rate are due to a post-9/11 diversion bump in incoming students in 2003 and 2004, and a statistical definition adjustment with regards to 2006 data.

With regard to individual recruiting markets, the two leading source countries, India and China, exhibited well known growth patterns: After explosive and quite unsustainable growth at the beginning of the decade, growth rates declined significantly.

It is noteworthy that year-over-year growth patterns otherwise do not exhibit any wild swings such as observed, for example, in New Zealand. This, again, speaks to well balanced recruiting efforts in established markets which create a solid and predictable flow of students into the UK. This position mirrors the US' position in a number of source countries, although the marketing approaches employed differ.

### International Higher Education Student Enrolment in the United Kingdom by Top 10 Source Countries (Year-over-Year, 2001-08)




Notes: See Appendix.
Source: HESA.

## International Education Marketing Landscape

### Landscape Overview

In the United Kingdom, the government agency most involved with international higher education is the Department for Business, Innovation and Skills (BIS), which was created in June 2008 to absorb the Department for Innovation, Universities and Skills (DIUS) and the Department for Business, Enterprise and Regulatory Reform (BERR). This step was taken to create a single department committed to fighting the economic recession.

In terms of education, BIS carries DIUS's prior mandate of maintaining university quality, expanding access to further and higher education, and investing in the UK's science and technology base. BIS's international education program is responsible for managing government-to-government science, technology and innovation relations, with both developed and emerging economies worldwide, in support of UK government policy. They are also responsible for providing advice and guidance to Ministers and policy makers on international education.

BIS has two units: the Joint International Unit (JIU), which plays a key role in forwarding BIS's international agenda, and the International Science and Innovation Unit, which is tasked with pursuing excellence in science research and managing the Science and Innovation Network. JIU also advises ministers and policy makers on the international dimension of education, and ensures representation in cross-departmental groups, the EU, and other international organizations for the promotion of the UK's education policies and programs. BIS owns the Education UK brand, which is being managed by the British Council on their behalf (see below).

Among the more significant international education activities in the UK are the two Prime Minister's Initiatives (PMI and PMI2). The first phase, PMI, was launched in 1999 and aimed at increasing the number of international students studying in the UK. It also sought to encourage collaboration between universities, the government, and other bodies in order to promote UK education abroad. The targets set – to increase the number of non-EU international students studying in the UK by 75,000 by the year 2005 – were exceeded ahead of schedule.

The second phase, PMI2, was launched in April 2006 with the overarching goal of establishing the UK as a leader in international education, as well as sustaining the managed growth of UK education being delivered both in the UK and overseas. Its specific targets include attracting an additional

100,000 students to the UK by 2011 (70,000 in higher education, 30,000 in further education) and, at the same time, to double the number of countries sending more than 10,000 students to the UK per year.[31]

The four strategic focuses of PMI2 are: Positioning the UK as a leader in international education through marketing and communication strategies, diversifying markets in order to reduce the UK's current dependence on a small number of source countries, maintaining the quality of student experience, and developing strategic partnerships, including encouraging more UK institutions to establish partnerships with their overseas counterparts.

The UK government, the British Council, the further and higher education sectors, and the English language sector have come together to provide a total of nearly GBP 7.0 million (CAD 12.8 million) per year to fund PMI2-relevant activities and initiatives.[32]

The UK's major representative body and membership organization for the higher education sector is Universities UK (UUK), which was founded in 1918 and currently comprises 133 members, including virtually all universities in the UK as well as some colleges of higher education. Together with Higher Education Wales and Universities Scotland, UUK works to advance the interests of universities and to encourage good practice throughout the higher education sector.

UUK employed an average of 84 staff in 2008, and had total incoming resources of GBP 9.8 million (CAD 17.9 million) in the same year.[33] UUK has charitable status as a company and is financed mainly through subscriptions by its member institutions. All members meet four times a year.

Universities UK has three autonomous national councils covering England and Northern Ireland, Scotland, and Wales. Universities Scotland represents the heads of higher education institutions (HEIs) in Scotland, and Higher Education Wales represents heads of HEIs in Wales. The England and Northern Ireland Council represents the remaining members on issues that do not have UK-wide implications. Each council has an elected chair (or convener, in the case of Universities Scotland) who is also a Vice-President of Universities UK. Universities UK has offices in London, Edinburgh and Cardiff to support the national councils.

[31] Source: British Council website's overview of PMI2.
[32] Source: BIS website.
[33] Source: UUK Financial Statement 2008.

Another key player in the sector is the UK Higher Education International Unit (IU). Based in London, IU is funded by six stakeholders: the Higher Education Funding Council for England, the Scottish Funding Council, the Higher Education Funding Council for Wales, the Department for Employment and Learning (Northern Ireland), Guild HE, and Universities UK. It also receives grants from the British Council and the Prime Minister's Initiative.

IU's total income for 2007-8 was GBP 438,424 (CAD 799,247).[34] It is currently funded for an initial 3.5 years, with review for extension in 2010. IU's operations include producing investigative reports commissioned from external consultants, so as to provide information and analysis to players engaged in the internationalization of the UK's higher education sector. IU employs four staff members: the Head, a Communications Officer, and two Policy Advisers.

Other stakeholders include the UK Council for International Student Affairs (UKCISA), which is the UK's national advisory body serving the interests of international students and those who work with them. It promotes and facilitates international student mobility to and from the UK.

Another relevant organization is the Universities and Colleges Admissions Service (UCAS), which is responsible for managing applications to higher education courses in the UK. Each year, UCAS processes more than two million applications for full-time undergraduate courses. They also provide logistical assistance services to students to assist them in finding the appropriate course for them. UCAS operates with a staff of 400; 77% of whom work full time and had total incoming resources of GBP 27.2 million (CAD 49.6 million) in 2008.[35]

[34] Source: IU Annual Report 2007-8.
[35] Source: UCAS Annual Report 2008.

## Organizational Capsule: British Council

The British Council was established in 1934 to promote wider knowledge of the United Kingdom abroad, to promote the knowledge of the English language, and to develop closer cultural relations between the United Kingdom and other countries. The Council is sponsored by the Foreign and Commonwealth Office.

The British Council works separately from the UK Government and it does not carry out its functions on behalf of the Crown. However, the Secretary of State for Foreign and Commonwealth Affairs is answerable to Parliament for the policies, operations and performance of the British Council,. The Council is also advised by three National Committees (for Scotland, Wales and Northern Ireland) and three Sector Advisory Groups (for education and governance, English, and science and engineering). Members of these committees and groups have no decision-making abilities.

The Education UK brand was adopted by the Council in 1999 to create a coherent way of recruiting international students to study in the UK. The brand is used by the Council in over 85 countries, and 370 UK education institutions are licensed to use it. The Education UK brand is owned by BIS on behalf of the UK government, and is managed by the British Council in perpetuity. The majority of Education UK brand communications are delivered through the Council's global operations.

The Council's marketing efforts, encapsulated in a program titled *Education UK Marketing*, consists of two key areas: the Prime Minister's Initiative for international education, and a national membership organization called the Education UK Partnership. The program is also responsible for generating research on the education market, managing promotional exhibitions and training events, and providing international education-related news for UK education providers.

This program translates into activities such as Education UK exhibitions, over 50 of which are organized around the world by the Council each year. These exhibitions, some of which attract over 30,000 visitors, are designed to bring representatives from UK education providers into contact with international students, and provide a platform for these providers to promote their courses and build links with local education providers. The Council also offers training courses for UK institutions and partner institutions to support them in the international marketplace. One recent example of this is the International Marketing Program for institution staff, taught over a four-month period with one three-day module being conducted each month. It also organizes large international education conferences, as well as annual Partnership Conferences.

The Education UK Partnership, launched in 2005, brings UK education providers and the Council together. The Partnership comprises the Council, the Association of Chartered, Certified Accountants (ACCA), UCAS, and over 290 education provider institutions, collectively representing the higher education, further education and independent sectors. It is funded by its members. The Partnership builds on its member network by investing additional funds in a number of the Council's country offices to provide specific products, services and benefits for its members. The Partnership provides marketing activities to support institutions in their international education and recruitment strategies. The Council contributes funding to the Partnership through its grant from the Foreign and Commonwealth Office, while the UK education providers contribute through a combination of subscriptions and payments for products and services. The Partnership aims for a balanced funding model: market-driven, but with provision for a level of stability. It is staffed with 25 employees and operates out of Manchester, UK.

The Council has a physical presence in 112 countries and territories. This includes 182 offices, 129 libraries, 75 teaching centres, and 16 other centres. The Council employed a monthly average of 7,395 employees in 2007-8, and operated with incoming resources that totalled GBP 564.6 million (CAD 1,029.3 million) in the same year. This figure represents a combination of grant income (35.0%), fee income for Council services (44.4%), and other sources such as interest and contract activity funding (20.6%).

The Council's grant income is principally received from the Foreign and Commonwealth Office (GBP 189.5 million / CAD 345.5 million in 2007-8), but also includes specific grants to deliver education activity on behalf of the education departments of England, Wales and Northern Ireland (GBP 8.4 million / CAD 15.3 million in 2007-8). Its fee income-generating services include educational services to promote English language learning, educational services to increase learning opportunities and educational cooperation, sponsorship and revenue from creative arts events, and management fees from contract and agency activity.

In 2007-8, the British Council's total expenditure was GBP 557.4 million (CAD 1,016.1 million). Of this, "Strengthening Educational Cooperation" accounted for GBP 280.7 million (CAD 511.7 million), and "Promotion of English Language Training" accounted for GBP 195.6 million (CAD 356.6 million).

## United Kingdom: Basic Statistics

| | |
|---|---|
| Total population (2007) | 60,768,946 |
| GDP (2006) | GBP 1,290.0 b |
| GDP per capita (PPP) (2006) | USD 33,087 |
| Total number of students enrolled in post secondary non-tertiary education (2007) | 2,367 |
| Total number of students enrolled in tertiary education (2007) | 2,362,815 |
| Total number of outbound mobile students (2007) | 24,115 |
| Total number of international students in UK higher education institutions (2008) | 341,795 |
| International students as a percentage of all tertiary enrolment (2007) | 14.9% |
| Total number of universities | 133 |
| Total number of higher education institutions | 166 |

Sources: HESA, OECD, UIS, Universities UK.

## 3.7 United States

### International Education Marketing and Recruitment Trends

#### Introduction

For many decades, international education and the US higher education landscape were effectively synonymous. The US dominated through its enrolment share, the brand perception of its higher education institutions, and a general cultural and social attractiveness often casually labelled "the American way of life".

The 9/11 terrorist attacks contributed to a fundamental change of this notion. Eight years after 9/11, the US has arguably lost is hitherto automatic primacy in international education. There is no doubt that US government policy decisions following 9/11 contributed, directly and indirectly, in a negative manner to the subsequent development of the US international education landscape.

The highly scrutinized, more complicated, and at times seemingly impossible issuance of a student visa for applicants form the Middle East or Muslim countries has damaged not only the national brand of the US, but also, by implication, its educational brand. While, especially at a procedural level, much progress has been made, ill feelings continue to linger and are unlikely to dissipate soon.

At the same time, many US higher education institutions found themselves essentially exposed as novices in the business of international education marketing. Decades of institutional reliance on a combination of academic strength, unrivalled financial resources to attract talent, and a strong national brand had resulted in the absence of an ability to analyze least react to an external shock: Neither governance nor resourcing nor organizational design had been developed to a level which allowed to effectively counter the challenging post-9/11 marketing conditions.

Starting around 2004/05, institutions, policy-makers, and associations began to develop concepts and initiatives which were aimed at re-establishing the primacy of the US in international education. A first hiring wave of "Senior International Officers" (SIOs) took place, albeit with quite mixed success. This lack of success was at least in part due to the fact that responses reflected on a historical competitive positioning which had been irretrievably altered.

By 2007-08, a second wave of policy responses commenced. SIO hiring accelerated, marketing and recruiting budgets were increased, and much more active outreach models were conceived. No small number of educators banked on the eventual departure of the then US President, George W. Bush, from office as a panacea to the international standing of the US. On many levels, this was a misunderstanding since the election of a predecessor would not automatically equate with an improved institutional marketing performance.

A dispassionate view on US international education marketing as of today would suggest that the US still lags notably behind leaders such as Australia and the UK. Associations such as NAFSA continue to focus on policy advocacy which effectively means requesting funding from US government. Quality training programs such as those created by the EAIE does not take place.

By 2009, educationUSA has grown to encompass around 450 offices, but its competitive impact is decidedly limited. A recent policy directive regarding the non-cooperation with agents seemed more geared towards protecting established structures than to face market realities.

Innovation, however, is occurring at an institutional level, with universities from MIT to the University of Southern California to Purdue finding success with smart and non-traditional international branding and recruiting approaches.

There is little doubt that a US international education landscape which wholeheartedly addresses today's competitive realities would be a formidable competitor. It remains to be seen how fast this gap will be closed.

### International Higher Education Student Enrolment Trends

Between 2000 and 2008, international higher education student enrolment in United States increased from 514,723 to 623,805 students[36]. This 21% overall gain of course hides, as mentioned, not one but multiple and at times conflicting trends.

A longer time series reveals that international student enrolments in the US had been growing without interruption since the 1950s. Therefore, the

[36] The questionable validity of the 2008 enrolment figure was already commented earlier on in this report.

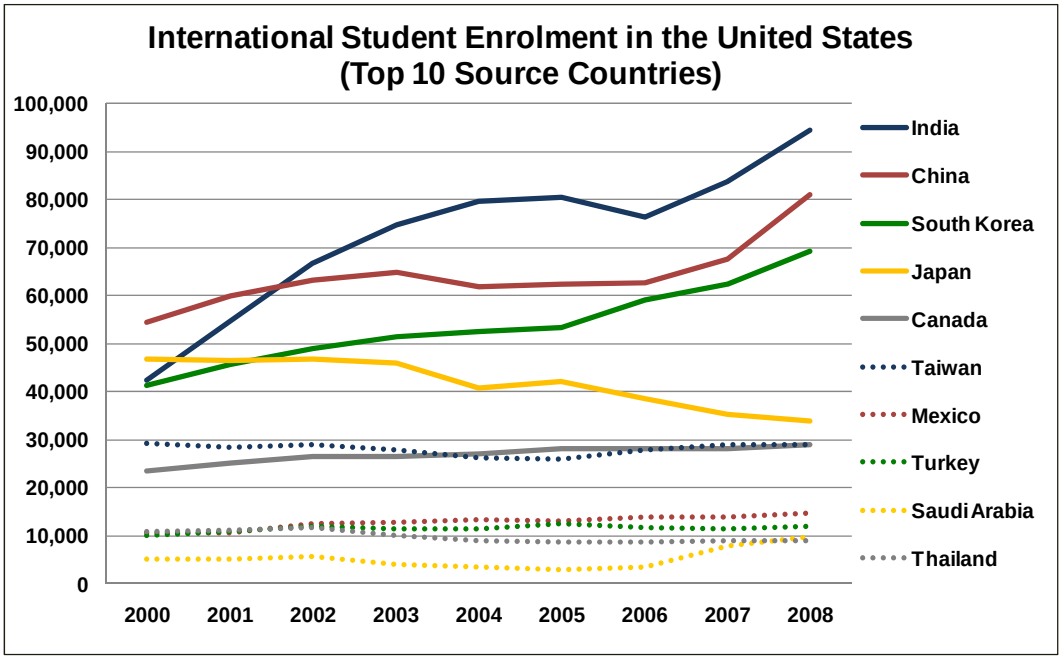
post-9/11 effects on student entry and subsequently enrolment were a shock to the US international education system.

The post-9/11 effects began to manifest themselves in 2002 and enrolment growth began to significantly slow down in 2003, while 2004 to 2006 saw three years with year-after-year enrolment declines. These, however, were much more moderate than is commonly assumed – just 3.7%.

It is important to note that the effects of 9/11 did impact source countries in very different ways. Amongst the top ten source countries three were not affected at all and posted steady enrolment gains from 2000 onwards: South Korea (from 41,191 to 69,124), Canada (from 23,544 to 29,051), and Mexico (from 10,607 to 14,837).

On the other hand, many countries from the Middle East and those with predominantly Muslim populations saw steep drops in enrolment, including Indonesia, Kuwait, Pakistan, and the UAE. Amongst top ten source countries, Saudi student enrolment dropped from 5,156 (2000) to 3,036 (2005), only to subsequently more than triple to 9,873 (2008).

**International Higher Education Student Enrolment in the United States by Top 10 Source Countries (Total, 2000-08)**




Notes: See Appendix.
Source: IIE Open Doors.

The key source countries for overall enrolment growth are readily identified. India became the leading source country in 2002 and by 2008 accounted for 94,563 enrolments (2000: 42,337). Enrolments from China had grown to 81,127 in 2008, up from 54,486 in 2000. South Korea has become the third largest source country with an enrolment level of 69,124 students in 2008 (2000: 41,191). The enrolment share of these three countries grew from 26.8% in 2000 to 39.3% in 2008, which constitutes a relatively high degree of concentration.

The remaining 2008 top ten source countries include Japan (enrolments declined from 46,872 to 33,974), Taiwan (enrolments slightly slid from 29,234 to 29,001), Turkey (enrolments grew from 10,100 to 12,030), and Thailand (enrolments declined from 10,983 to 9,004).

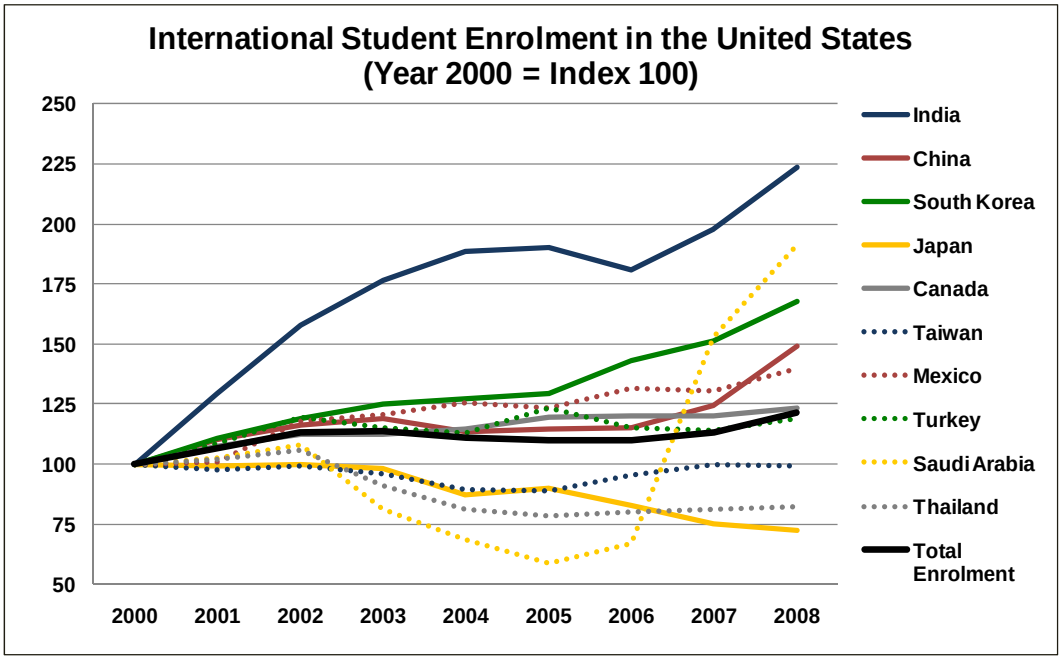
Indexed growth trends as displayed in the below graph show that the US can typically rely on stable, long-term recruiting patterns which result in quite manageable enrolment trends. Growth trends tend to occur in a steady motion, whether enrolments increase or decline.

Amongst top ten source countries, only two deviate from this pattern. One country is India, which saw highly accelerated enrolment growth between 2000 and 2004, a flat growth trend until 2006, and a subsequent acceleration of enrolment growth again.

The second country is Saudi-Arabia, which, for the discussed reasons, experienced two strong countervailing trends, the aforementioned enrolment drop post-9/11 and a sharp rise beginning in 2007 owing to joint Saudi-US recruiting efforts.

A key insight from this discussion is that the US international education landscape shows clear signs of maturity which makes radical developments unlikely unless these are imposed from the outside.

International Higher Education Student Enrolment in the United States by Top 10 Source Countries (Index, 2000-08)



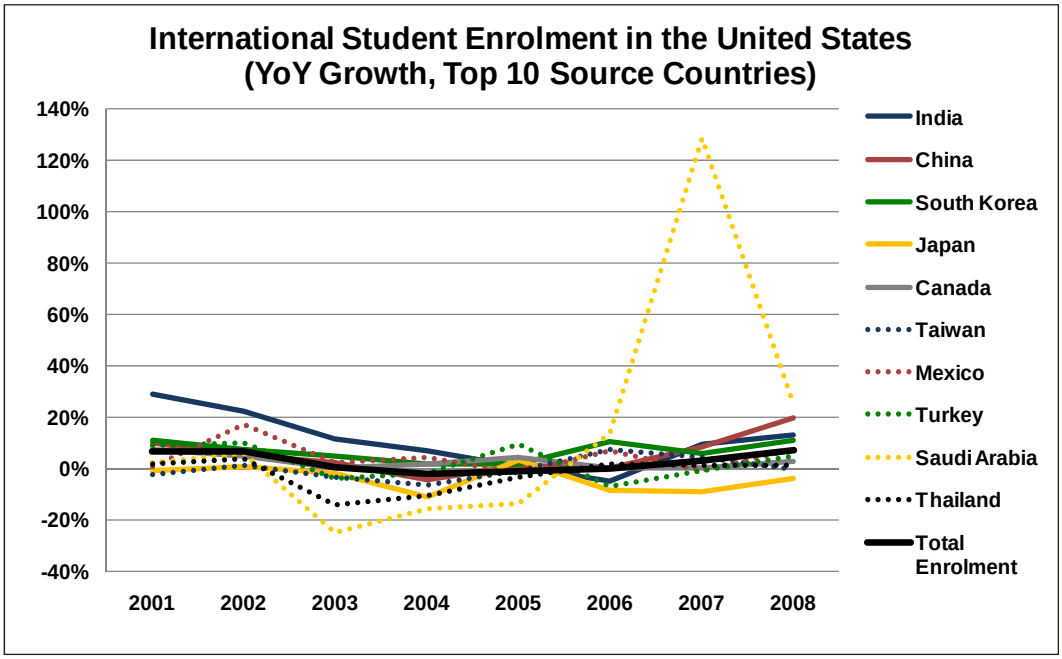

Notes: See Appendix.
Source: IIE Open Doors.

Following the theme of a mature market, the below graph clearly shows the "bunching" of the top ten source countries year-over-year growth patterns. For example, in 2007, the maximum deviation from the overall growth rate was a very low six percentage points when discounting Saudi-Arabia.

In contrast to smaller recruiting countries such as New Zealand, or heavily marketing driven education systems such as Australia, annual growth rates in the US have been much more moderate. Since the mid-1990s, growth rates have not exceeded 7.0%, and in an eight year span, not exceeded 2.0%.

One simple reason for these relatively low annual growth rates is the sheer size of the international student body in the US which makes any significant movements difficult from a statistical perspective alone. To provide some context, the US gained more international higher education students in 2008 than New Zealand enroled in total in the same year.

### International Higher Education Student Enrolment in the United States by Top 10 Source Countries (YoY Growth, 2001-08)




Notes: See Appendix.
Source: IIE Open Doors.

## The United States' International Education Marketing Landscape

### Landscape Overview

In the US, the government body most involved with international higher education is the Department of State, Bureau of Educational and Cultural Affairs (ECA). This Bureau – one of 40 Bureaus in the Department of State – is charged with fostering mutual understanding between people of the United States and people of other countries.

Its activities thus promote personal, professional, and institutional ties between private citizens and organizations in the United States and abroad. This is often achieved by presenting US history, society, art and culture to overseas audiences. The most visible initiatives supported by the ECA is educationUSA which effectively leads US governmental educational promotion efforts (for an organizational capsule see below).

The Department of Education, and – specifically – its International Affairs Office (IAO) is also involved in international education. The Department was created in 1980 to promote student achievement and preparation for

global competitiveness by fostering educational excellence and ensuring equal access. The Department operates with 4,200 employees and a USD 68.6 billion (CAD 76.0 billion) overall budget.

The IAO, which is run by five staff members, is responsible for coordinating the overall Department's international presence. The IAO works with Department program offices, support units, and senior leadership as well as with external partners, including other federal agencies, state and local agencies, foreign governments, international organizations, and the private sector. Through the IAO, the Department administers over 40 international programs with annual budgets totalling over USD 120.0 million (CAD 133.0 million).

The US Network for Education Information (USNEI) was created in 1996 to serve as a central information point for the international education sector in the US. It is located in the Department of Education and has been administered by the IAO since 2002. USNEI provides students and professionals with information about coming to the United States, recognition of foreign qualifications, accrediting US institutions and programs, avoiding frauds, and financial aid.

For international educators and officials, USNEI provides information about the US education system, US accreditation and quality assurance, recognized institutions, avoiding fraudulent providers, and related resources. Also, for US students, UNSEI provides information on studying abroad, financial aid, and links to official information about education in other countries.

The largest member organization for international higher education in the US is NAFSA: Association of International Educators. The association was founded in 1948 as the National Association of Foreign Student Advisers. Its goal was to promote the professional development of American college and university officials responsible for assisting and advising foreign students who had come to study in the United States after World War II.

Today, NAFSA's main functions include promoting international education and providing professional development opportunities to the sector. NAFSA also sets standards of good practice for member institutions, and provides networking opportunities for them.

NAFSA relies on several sources for its funding, including member dues, annual conference registration and exhibitor fees, publication sales, workshop registrations, US Government grants for special programs,

contributions from members, foundations and Global Partners, and investment income. It has a membership base of approximately 10,300, operates with a staff of 66, and in 2007 had a budget of USD 11.1 million (CAD 12.3 million)[37].

Another important stakeholder is the Institute of International Education (IIE). IIE was founded in 1919 as an independent, non-profit organization for promoting international education. It delivers a range of programs to participants and relies on funding through sponsorships for their programs as well as donations.

IIE manages over 250 programs, with sponsors ranging from government bodies such as the US Department of State and the US Agency for International Development, to international organizations such as the World Bank, to foundations such as the Ford, and GE Foundations, to foreign governments such as those of Brazil and Japan. IIE publishes the Open Doors data collection which is widely used. IIE operates with a staff of 600 in 33 locations worldwide, and created revenues totalling USD 274.6 million (CAD 304.3 million) in 2007-08[38].

There are myriad other organizations in the US that are involved in the international higher education sector. These include the Council on International Educational Exchange, a fee-for-service and self-supporting organization which creates and administers programs that allow high school and university students and educators to study and teach abroad.

Another organization is the Fulbright Program, an international merit-based exchange program supported through an annual appropriation from US Congress and partner nations.

A third example is the American International Education Foundation, a non-profit organization that works with educators, school representatives and government officials worldwide on a range of international student services and exchange programs.

Organizational capsule: educationUSA

educationUSA is a global network of advising centers supported by the Department of State through the ECA. It is cast as the international student's guide to higher education in the United States. educationUSA

[37] Source: NAFSA Report to Members 2008.
[38] Source: IIE Annual Report 2008.

centers promote United States higher education around the world by offering comprehensive information about education institutions in the United States, as well as guidance to qualified individuals on how to best access those opportunities.

educationUSA operates with a network of 450 advising centres worldwide, headed by 13 Regional Education Advising Coordinators (REACs). Centres are staffed by professional advisers, many of whom have first-hand experience having studied in the United States themselves, and/or having received State Department-approved training about United States higher education and the advising process. The Centres are located in a variety of institutions, including US embassies, Fulbright Commissions, non-profit organizations, bi-national centres, local universities, and private foundations.

educationUSA staff in Washington also work with the US higher education community, providing information on international education policy, global education systems, the importance of recruiting international students, how to cooperate with educationUSA centres around the world, and how to maintain an international student-friendly campus and website.

Some of the activities educationUSA supports include individual and group advising sessions, profiles of US institutions, workshops on how to complete effective applications, financial aid and scholarship information, preparation for standardized tests, visa and immigration rules and resources, pre-departure orientation, and university recruiting fairs.

The ECA sponsors two professional development programs for educationUSA advisers: Professional Advising Leadership (PAL) fellowships, which are individually designed annual programs for senior advisers, and the US-Based Training Program (USBT), an annual three-week program for mid-level advisers with two to five years of experience. The three weeks include a week in Washington D.C., a week of campus visits and internships, and a week at a NAFSA national or regional conference.

Much of the statistical and budgetary information for educationUSA is not available as ECA does not publish information on educationUSA. Despite repeated attempts to contact the Bureau, no information regarding educationUSA statistics was forthcoming. A Freedom of Information Act (FOIA) request has been filed and is pending.

## United States - Basic Statistics

| | |
|---|---|
| Total population (2007) | 305,826,246 |
| GDP (2006) | USD 13,163.9 b |
| GDP per capita (PPP) (2006) | USD 43,968 |
| Total number of students enrolled in post secondary non-tertiary education (2007) | 446,604 |
| Total number of students enrolled in tertiary education (2007) | 17,758,870 |
| Total number of outbound mobile students (2007) | 50,265 |
| Total number of international students in US higher education institutions (2008) | 623,805 |
| International students as a percentage of all tertiary enrolment (2007) | 3.4% |
| Total number of higher education institutions (1999) | 4,084 |
| 4-year | 2,363 |
| 2-year | 1,721 |
| Total number of higher education institutions (2009) | 4,861 |
| Public 4-year | 654 |
| Private 4-year, non-profit | 1,547 |
| Private 4-year, for profit | 490 |
| Public 2-year | 1,132 |
| Private 2-year, non-profit | 181 |
| Private 2-year, for profit | 857 |

Sources: Chronicle of Higher Education, IIE, OECD, UIS, US Census.

# 4. CANADA'S INTERNATIONAL STUDENT RECRUITMENT LANDSCAPE

## 4.1 Canada's Performance in Competitive Contrast

### Introduction

International education has been on a sustained growth trajectory across multiple dimensions, ranging from institutional relationships to research collaborations to student mobility levels. The key – and, on some level, the most reliable – benchmark of this growth has been tertiary international student enrolment. To a large extent, this is the data category that both UNESCO and OECD use when publishing educational data.

This report takes a slightly narrower approach, by focusing on (international student) higher education enrolment. There are three reasons for this approach. First, as higher education is a narrower field than tertiary education, it (ideally) yields more comparable data. Second, higher education data tend to be available at greater depth and in longer time series than non-higher education tertiary data. Third, higher education has traditionally accounted for the bulk of international student enrolment.

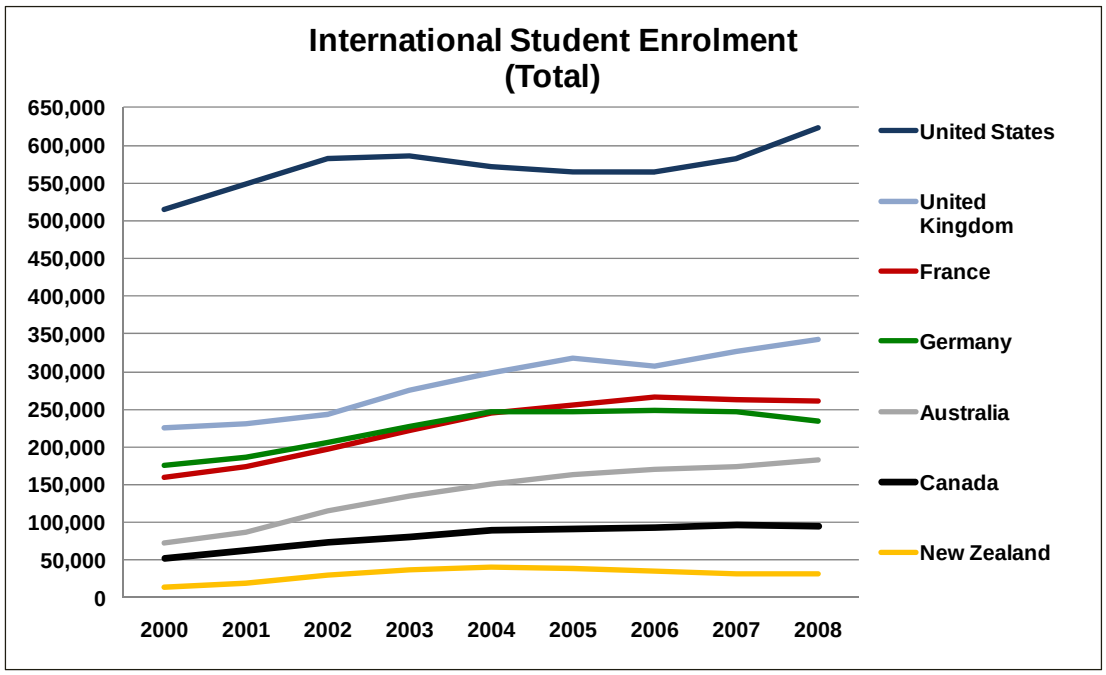
The following three graphs put Canada's international student enrolment trends into comparative perspective with those of selected key competitors. To aid interpretation, some brief methodological disclaimers are in order:

- Data utilized for the graphs in this section are based on separate in-country sources, not OECD or UNESCO data.
- Data are for higher education international student enrolments. Please note that, despite this limited focus, notable variations in student pool definitions exist between countries. Hence:
  - Australian, French, German, and UK data reference higher education students only.
  - Canadian data reference university students only.
  - New Zealand data reference higher education students in public institutions only.
  - US data are based on IIE data, which include international students at community colleges. While it can be argued that this effectively includes tertiary studies, no effective differentiation is possible.
- A number of data sets have been drawn up by aggregating separate data sets. This introduces various statistical compatibility issues. French data are subject to a minor timeline break in 2007. New

Zealand data are subject to a moderate timeline break in 2007. UK data are subject to a significant timeline break in 2006.

- In some instances, data definitions have changed over time, with significant statistical consequences. For example, US data for 2008 overstate international student enrolment growth owing to a re-definition of the eligible student pool, which resulted in the inclusion of students who have left higher education but are in the workforce on their student visas. In the UK, students who are writing up their theses were included for all years up until 2007/8, where they were excluded.

Competitor International Student Enrolment (Total, 2000-08)




Notes: See sub-chapter introduction. The respective market share and rank order of countries differs when using higher education as opposed to tertiary enrolment data. Japan, the seventh-most popular international tertiary students destination, is not included for reasons discussed in Chapter 3.1.

Sources: CampusFrance, CIC, DAAD/HIS, DEST/AEI, ENZ, HESA, IIE.

The US remains the dominant receiving country, with enrolments having increased from nearly 515,000 in 2000 to about 624,000 in 2008. Despite the much-publicized enrolment drop seen after the 9/11 terrorist attacks, US universities and colleges have remained the most popular international student destinations by far. Since 2007, US enrolment numbers have rebounded strongly. However, as mentioned above, 2008 data is assumed to overstate the number of actual enrolment growth by at least 10,000 students.

The UK has maintained its position as the second-most sought-after destination country, showing an enrolment gain from just under 225,000 in 2000 to nearly 342,000 in 2008. The UK has benefited from a balanced recruiting intake which is spread across Europe, the Commonwealth, and other sending countries. It also balances undergraduate and (post-) graduate enrolments well. The enrolment drop in 2006 is largely the result of a change in data definitions.

France has emerged as the third most attractive country, with enrolments having risen from around 161,000 in 2000 to slightly less than 261,000 in 2008. French higher education institutions have a distinct geographic recruiting focus, which differs from those of the Anglo-Saxon higher education systems. Enrolment figures in France have begun to level out since 2006.

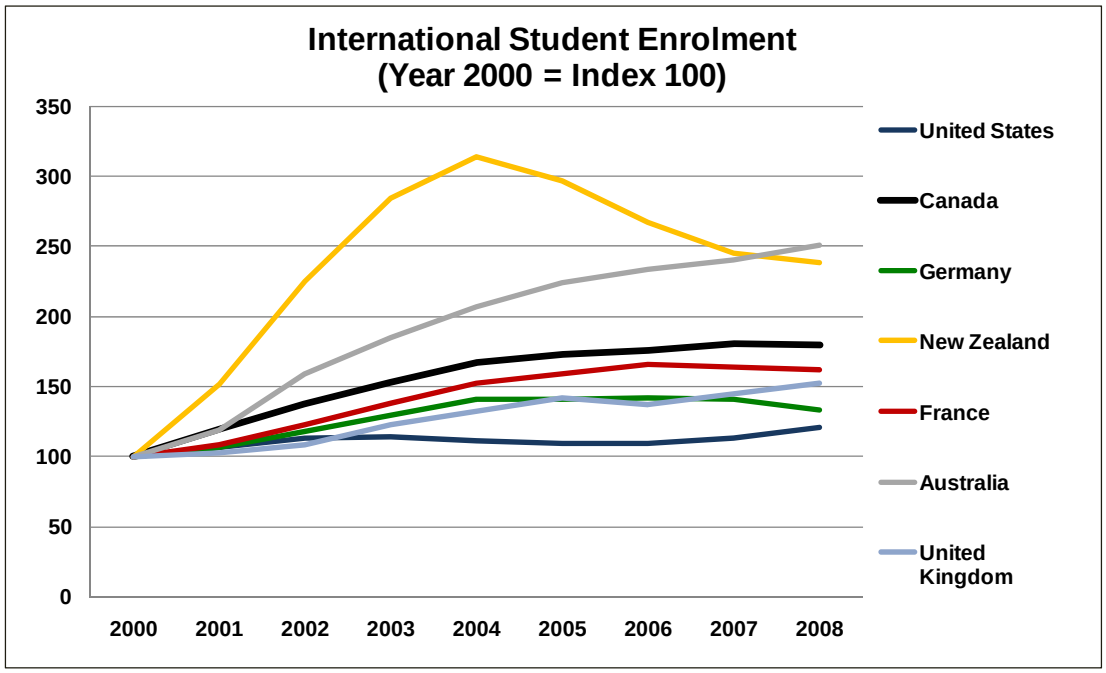
Germany has slipped to fourth place, with enrolments having risen from about 175,000 in 2000 to around 234,000 in 2008. Similar to France, German universities' geographic recruiting foci have been somewhat different in comparison to those of the Anglo-Saxon countries. Enrolments in Germany began to level out in 2005 and started to drop in 2007.

Australia has been a success story across all educational sectors, including higher education, in which enrolments grew from close to 73,000 in 2000 to nearly 183,000 in 2008. Preliminary data indicates that Australia recently surpassed Germany and France in international student enrolment when all educational sectors are considered. Australia experienced especially strong growth in 2003-04, which was partially driven by students searching for alternatives to the US after 9/11.

Canada is in sixth place, after seeing international student enrolment numbers at Canadian universities rise from around 53,000 in 2000 to more than 95,000 in 2008. Growth between 2000 and 2004 was strong, but has since slowed considerably. 2008 saw a slight drop in enrolment figures. Canada's recent performance is thus similar to that of Germany and France, and quite distinct from that of Australia, the UK, and the US.

The remaining competitor, New Zealand, has experienced strong fluctuations in its international student enrolment levels. Enrolments grew from just over 13,000 students in 2000 to nearly 32,000 in 2008. Enrolments reached nearly 42,000 in 2004, owing to a surge of students coming from China. This, however, was followed by an abrupt reversal in entry and enrolment figures from the same student pool, which was significant enough to cause an overall decline in enrolment.

## Competitor International Student Enrolment (Index, 2000-08)

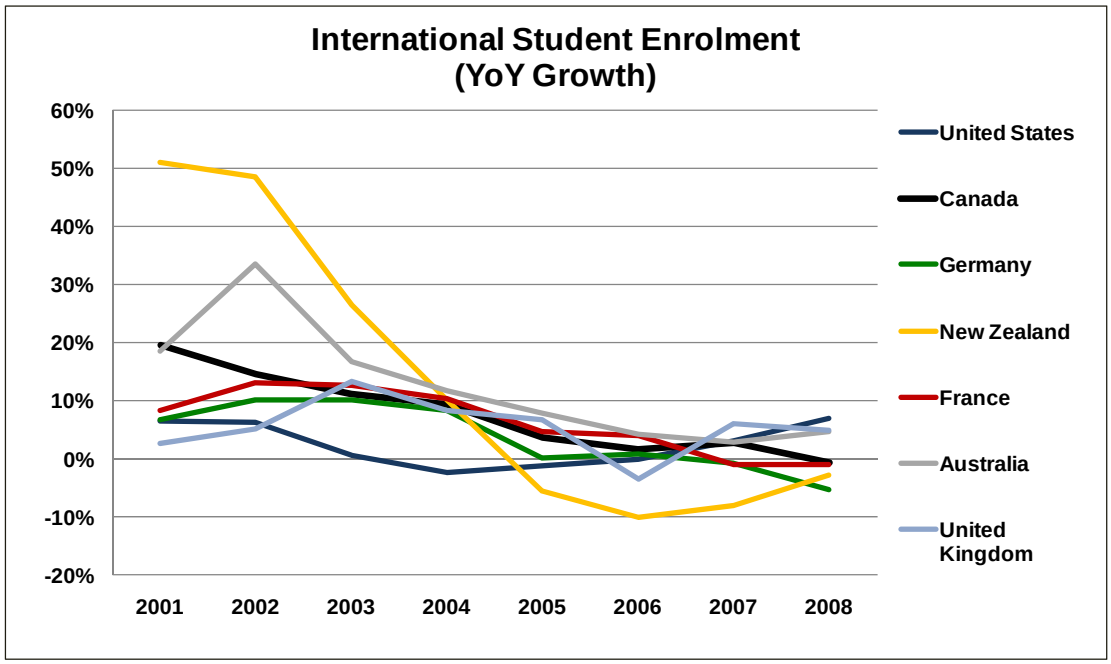



Notes: See sub-chapter introduction.

Sources: CampusFrance, CIC, DAAD/HIS, DEST/AEI, ENZ, HESA, IIE.

The above graph gives an overview of indexed enrolment developments (the index is set to 100 for the year 2000). Every country depicted above experienced enrolment growth, albeit underpinned by quite different dynamics. Australia emerges as the country with the strongest sustained growth rates, while New Zealand, as mentioned above, is shown to have experienced an enrolment bubble mid-decade. The UK and the US have managed to increase enrolment growth in recent years. By contrast, index rates for Canada, France, and Germany show similar levelling out patterns, indicating a lack of competitive growth in new and/or emerging markets.

### Competitor International Student Enrolment (YoY Growth, 2000-08)




Notes: See sub-chapter introduction.

Sources: CampusFrance, CIC, DAAD/HIS, DEST/AEI, ENZ, HESA, IIE.

A calculation of year-over-year growth rates reveals that enrolment growth dynamics have generally slowed since 2000. This is clearly the case for Australia, Canada, France, Germany, and – to a lesser extent – the UK. Growth in New Zealand and the US recovered after experiencing respective slumps. There are two reasons for this dynamic. First, growth tends to slow naturally in large systems, in what is known as the "s-curve" dynamic. Second, new competitors such as China, Malaysia, and Singapore have emerged, and are rapidly absorbing increasing numbers of international students.

## Perspectives

International student enrolments are on the rise, but not all countries are profiting equally from this trend. Indeed, some of the countries covered here have lost touch with the trend altogether. Without attempting to forecast, some trending is visible:

- Australia is likely to continue seeing enrolment gains, albeit under a growing cloud of questions regarding the quality and value delivered by its higher education institutions. As it stands, much of Australia's recent overall (tertiary) growth has been generated in the vocational education and training sector.

- Canada's lack of a strong marketing footprint hurt its enrolment growth dynamics in recent years. A sustained change in performance in this area could unlock growth trends similar to those that the US and UK have recently experienced.
- France will have to articulate and execute its higher education system reforms before it can expect noticeable enrolment growth again. With five of its top 10 recruiting markets being relatively poor African countries, questions remain as to whether France will be able to increase recruiting in a competitive tuition scenario.
- Germany is in a position similar to France's. Its top seven recruiting markets are relatively economically weak. The introduction of – rather modest – tuition fees in 2006 has already contributed to a decrease in the enrolment numbers from these countries.
- New Zealand, owing to the small size of its higher education system, appears bound to continue experiencing volatile enrolment trends. A case in point: While enrolments of Chinese students are growing again, the entry of Saudi students has declined.
- The UK appears poised for sustained enrolment growth at moderate rates. One driver of this trend will be the impending cuts in higher education and research funding to UK universities, which will push them to recruit more full fee-paying international students.
- The sustained enrolment growth that the US has seen in recent years is unlikely to continue. For one, key sending countries are experiencing challenging economic circumstances, which will make it difficult for many to afford the already expensive and ever-increasing US higher education tuition fees. In addition, a significant number of public higher education institutions have experienced budget cuts, which will have negative affects on their ability to attract and/or enrol international students.

## 4.2 Performance by Sector

### Introduction

The following discussion is based on data which were made available by the Department of Citizenship and Immigration Canada (CIC)[39]. Since CIC data are the only longitudinal, comprehensive data available for Canada, they have been used to drive both the overall and sectoral data discussions below.

Some members of the Canadian international education community have remarked on the definition and collection issues attached to CIC data. While this concern is legitimate (see comments in Chapter 6), no alternative is currently available. Therefore, the breakdown of this Chapter will follow CIC's sectoral classification scheme which is listed below.

CIC sectoral classification scheme :

- The secondary or less schooling sector. This sector includes all primary and secondary students.
- The trade sector. This sector is usually reserved for what other countries call vocational education and training students, whether they are in publicly-funded community colleges or private career colleges.
- The other post-secondary education sector. This sectoral definition is usually applied to other community college programs that are not of a vocational nature, including applied degrees, or the general programs in the CEGEP system in Quebec.
- The university sector. This sector includes undergraduate, graduate, and doctoral students.
- The "other" sector. This sector enrols long-term English or French as a foreign language students (more than six months), and all students a visa officer cannot place in another category (sometimes apprenticeships fall into this category as well)[40].

### All Sectors Combined

#### Enrolment

Total international student enrolment in Canada has risen by about 80,000 since 1999, from around 97,000 to more than 178,000 in 2008 (see graph

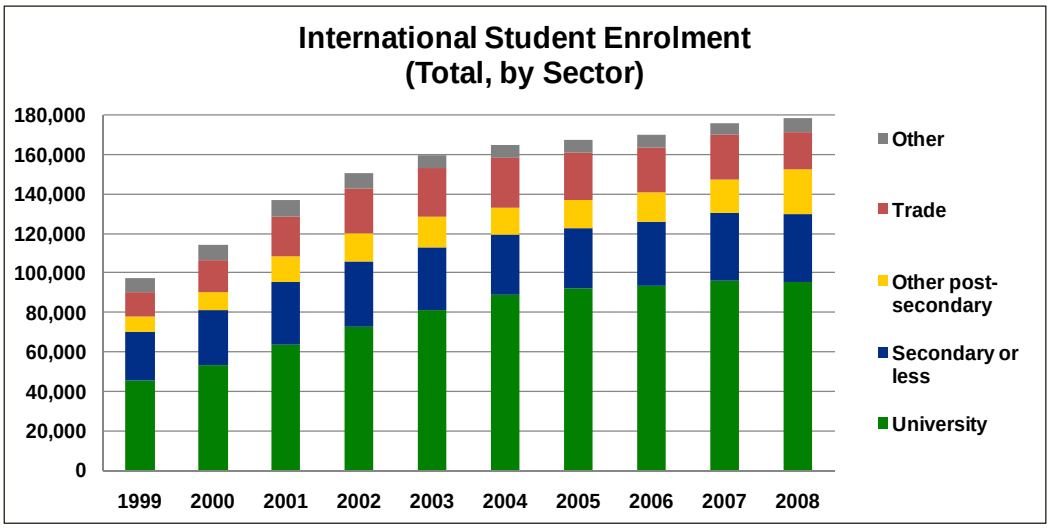
[39] The discussion is focused on quantitative developments and does not evaluate or comment on past promotion practices by sector.

[40] Given the unclear composition of students in this sector, no further discussion or analysis is offered.

below). Much of this growth occurred between 1999 and 2004. Since 2004, growth has slowed significantly.

University enrolments have led growth, with an increase from about 46,000 to more than 95,000. Secondary or less schooling was the second largest sector, posting an increase from nearly 25,000 to about 39,000 students. Student enrolment in other post-secondary courses increased from about 7,000 to nearly 23,000. The trade sector also experienced an enrolment increase, from less than 13,000 to nearly 19,000 students.

International Student Enrolment Trends by Sector (Total, 1999-2008)

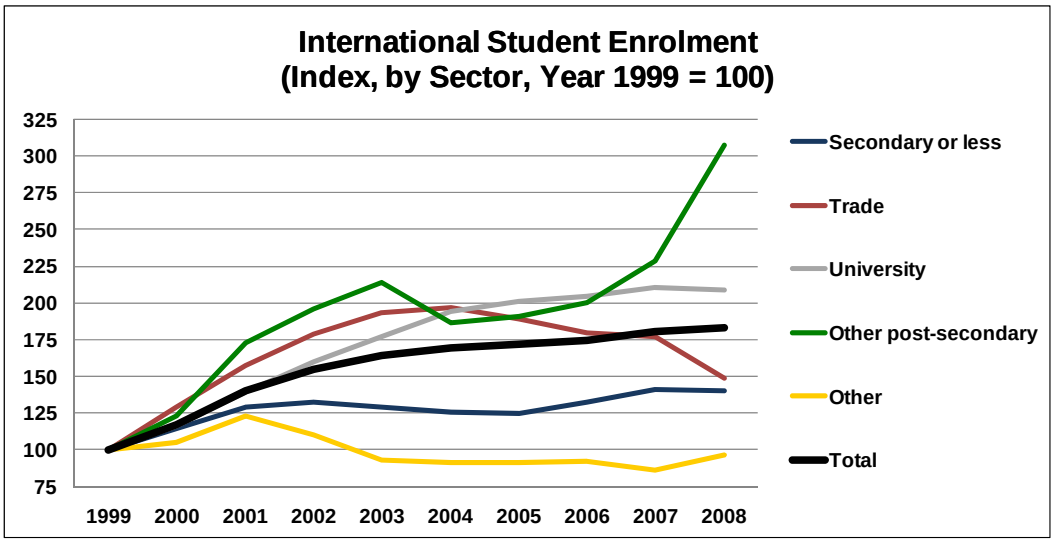



Source: CIC.

Sector share and growth rates differ notably. The share of the university sector has increased: In 2008, it enroled 54% of all international students (compared to 47% in 1999). The other post-secondary sector has also grown, going from 8% to 13% in the same time frame.

In contrast, the secondary or less sector has declined from 25% in 1999 to 19% in 2008, as has the trade sector, which decreased from 13% to 11%. In absolute terms, however, all sectors enroled more students in 2008 than in 1999, owing to the overall growth in international student enrolments.

International Student Enrolment by Sector (Index, 1999-2008)




Source: CIC.

An index calculation of sectoral enrolment developments highlights differing sector performance trends (see graph above). The university and other post-secondary sectors have been the main drivers of overall growth, with the former more than doubling and the latter more than tripling in enrolment levels. The secondary or less sector has contributed much less to overall growth, posting a rise of less than 50%. In contrast to Australia and Germany, Canada's trade sector has experienced a decline in enrolments since 2004, despite posting strong initial growth.

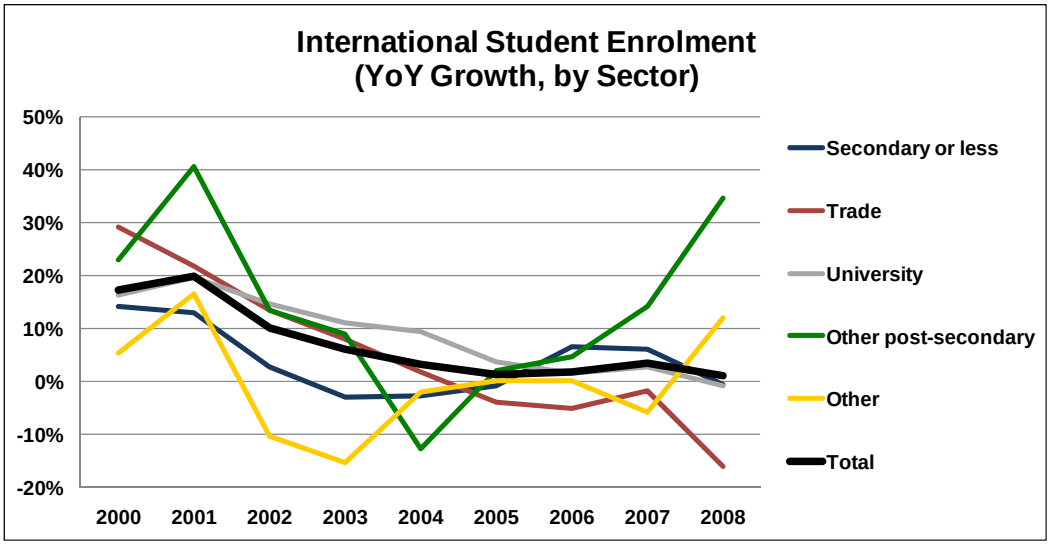
The graph below further defines the differences between sector-specific performance trends. Overall, year-over-year growth rates declined, from nearly 20% at the start of the decade to the low single digits seen in recent years. Much of this overall trend has been driven by the university sector, owing to its disproportionate share of total international student enrolment. Contrary to the stated views of some university sector representatives, growth in the sector has been very low since 2005, and actually dipped into negative territory in 2008. The secondary or less sector has similarly mirrored the overall trend line.

Two sectors stand out. The trade sector, as mentioned, has seen negative year-over-year enrolment growth rates since 2004. In contrast, the other post-secondary sector has seen strong fluctuations in year-over-year growth rates, going from 41% in 2001 to -13% in 2004 to 35% in 2008[41]. The key insight from the data discussion thus far is that any

[41] How much this development owes to data classification issues is unclear.

education promotion strategy needs to take note of the significantly different sizes and performance trajectories of the four sectors discussed here.

### Total International Student Enrolment by Sector (YoY Growth, 1999-2008)




Source: CIC.

An analysis of the top ten student source countries across all sectors (see graph below) highlights that Canada has on some level followed general source country-based enrolment trends. In Canada in 2008, by far the largest group of international students hailed from China, numbering more than 42,200 (23.7%).

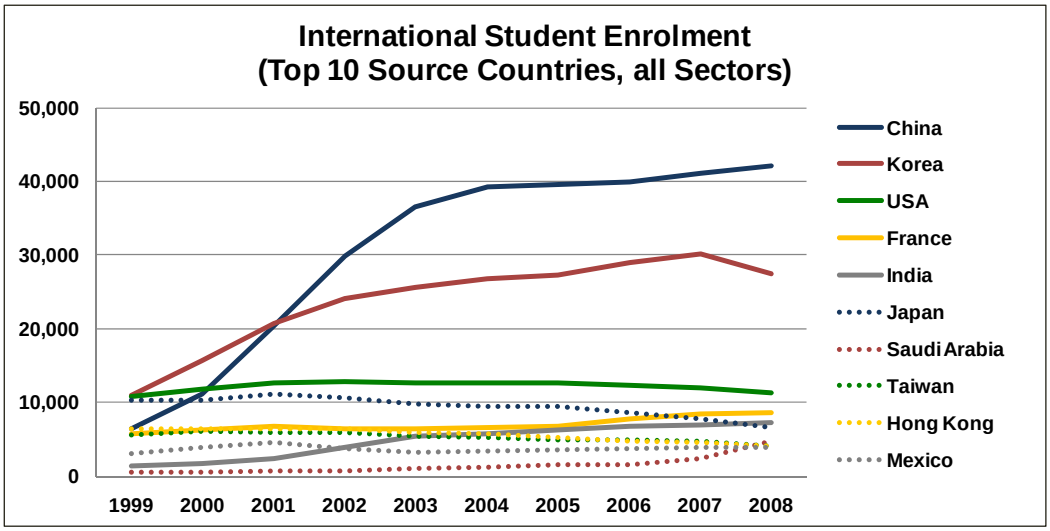
This is more than six times the number of Chinese student enrolment in 1999, which stood at approximately 6,500. The second largest sending country in 2008 was South Korea, with more than 27,400 students (15.4%), which is two and a half times the 1999 enrolment level of approximately 11,000.

The third largest sending country, the United States, has shown essentially flat enrolment levels since 1999. In 2008, more than 11,300 Americans studied in Canada (6.3%) compared with around 10,800 in 1999. The enrolment of students from France increased from more than 5,700 to about 8,600 (4.8%) during the same time period. Similarly to many other countries, Canada experienced a sizeable growth in the inflow of Indian students, from the low figure of 1,300 in 1999 to more than 7,300 in 2008 (4.1%).

The number of Japanese students in Canada declined notably, both in absolute numbers (from nearly 10,300 to about 6,600) and in terms of share (from 10.6% to 3.7%). Saudi students enrolled at very low rates until 2004, with enrolments ultimately growing to around 4,700 in 2008 (2.6%), up from just under 500 in 1999.

The enrolment figures for students from Taiwan and Hong Kong declined in both total numbers and share, from a respective 5,600 to 4,100 (2.3%) for Taiwan and around 6,500 to slightly more than 4,100 (2.3%) for Hong Kong. The number of Mexican students increased slightly, from approximately 3,000 in 1999 to close to 3,900 (2.2%) in 2008.

### Top 10 Source Countries' International Student Enrolment by Sector (Total, 1999-2008)

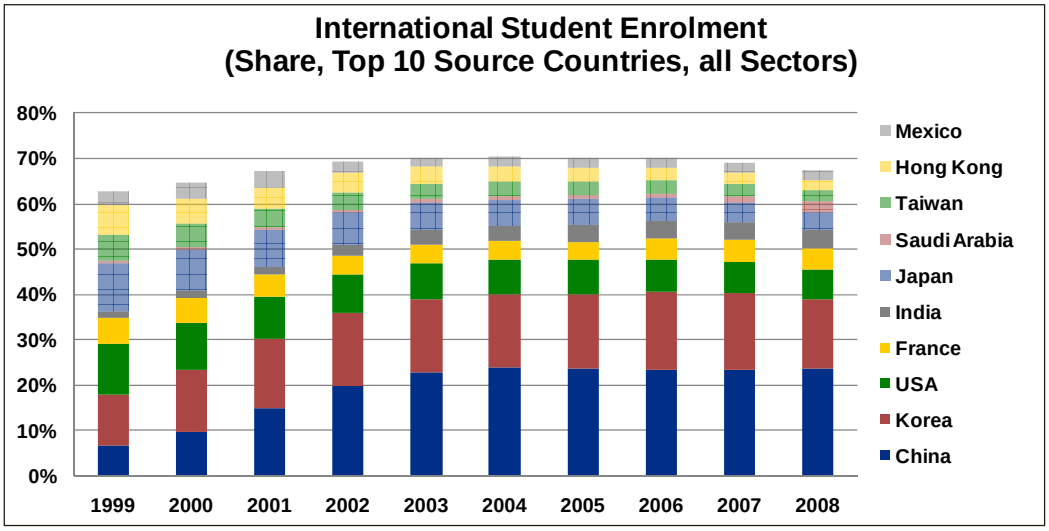



Source: CIC.

The graph below offers an additional perspective to the previous analysis. It shows the increasing enrolment concentration level of the top three source countries over time. In 1999, the top three source countries accounted for 33.0% of enrolments. By 2008, this share had risen to 45.4%.

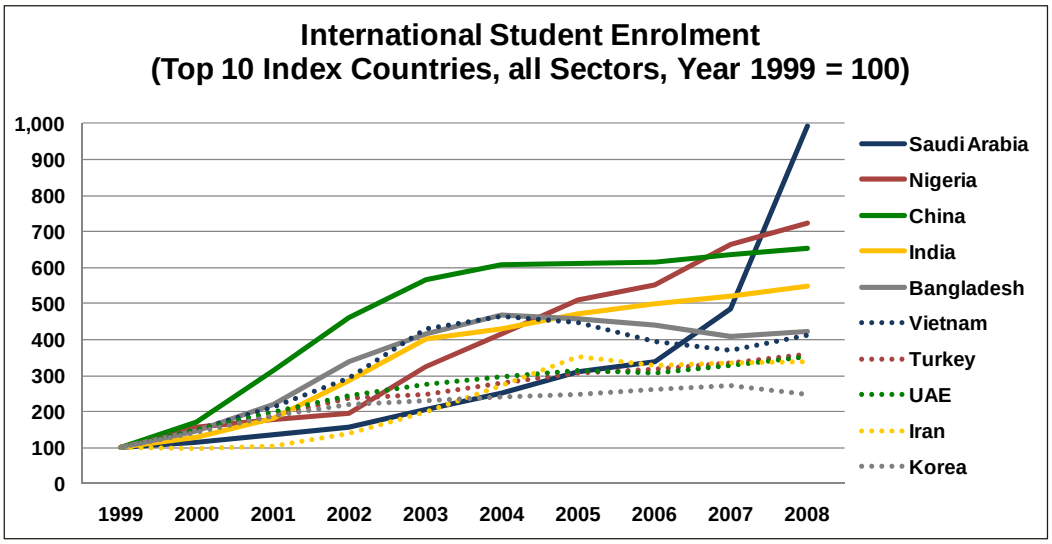
Similarly, the collective share of the top ten source countries increased from 62.8% to 67.4%. Such concentration patterns are a cause for concern on the technical grounds of structural risk alone.

### Top 10 Source Countries' International Student Enrolment in all Sectors (Share, 1999-2008)




Source: CIC.

### Top 10 Source Countries' International Student Enrolment in all Sectors (Index, 1999-2008)




Source: CIC.

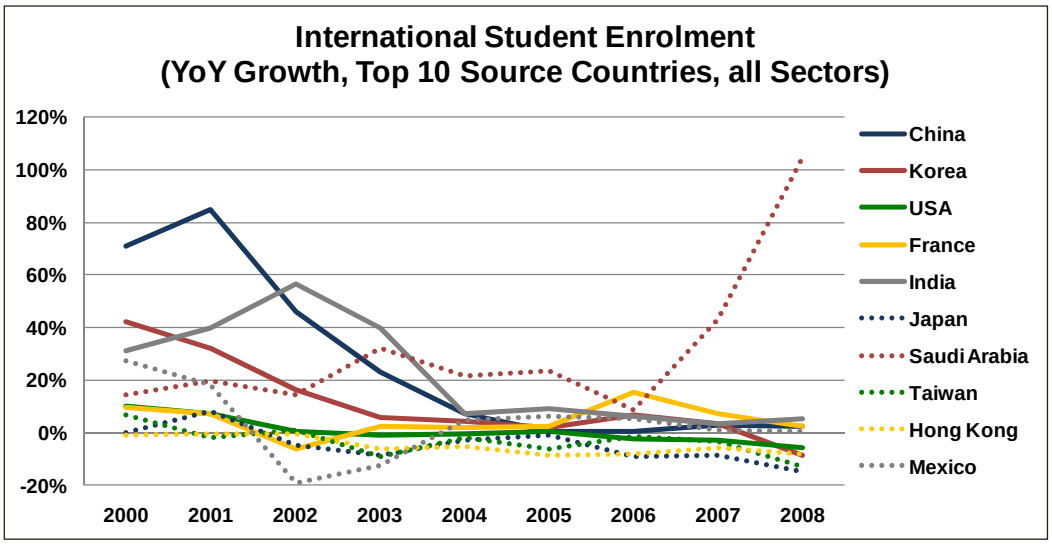
The graph above depicts the top ten source countries by indexed development since 1999. The index display allows for each country's absolute growth rates to be shown more clearly, and yields an alternative perspective. While it is hardly surprising to see China (652), India (548),

and Saudi Arabia (992) on this list, some smaller source countries show unexpectedly strong absolute growth rates: Nigeria (723), Bangladesh (423), Vietnam (411), Turkey (359), the UAE (354), and Iran (340). Given that most of the latter countries still send relatively small numbers of students to Canada, some may be likely to show continued growth in the future.

The final graph in this sub-chapter (below) displays the year-over-year growth rates for the top ten source countries from 2000 to 2008. Three observations emerge. First, the early part of the decade was characterized by strong, positive annual growth rates: As source countries, China, India, and South Korea grew at rates in excess of 20%.

Second, by 2006, no country's annual growth rates exceeded 20% any longer. Third, by 2008, half of Canada's top ten source countries slipped into negative growth rates. With the exception of Saudi Arabia, the other four leading source countries experienced low single digit growth. Canada is effectively experiencing a maturing market situation, quite prematurely.

**Top 10 Source Countries' International Student Enrolment in all Sectors (YoY Growth, 2000-08)**




Source: CIC.

## Perspectives

Canada, in many respects, is following in the footsteps of other major international student recruiters: Enrolments from China and South Korea

are up significantly, enrolments from India are rapidly gaining, and traditional source countries such as Hong Kong, Japan, and Taiwan are in decline.

A number of smaller sending countries such as Iran, Saudi Arabia, and Vietnam have shown strong increases in the number of students sent to Canada, albeit often starting from a small base in 1999. In the case of Saudi Arabia (and also the UAE), this is largely due to the difficulties students from these countries faced when trying to enter the US post 9/11, as well as a slate of new scholarship programs that have been set up by these countries' respective governments.

Overall growth rates have begun to decline significantly. Part of this decline was an inevitable market function of larger groups experiencing relatively slower growth owing to their sheer numerical size. A slightly more troubling question is why has growth for Canada come to a near halt when other countries are still experiencing sustained growth trends?

This question in turn raises the issues of how independent Canadian education is from general market trends, how much of its enrolment growth has been due to its own promotion efforts, and, most importantly, what Canada's competitive differentiation strategy is and will be.

## Secondary or less Schooling Sector

### Introduction

There is a small but growing global market for international studies at the secondary schooling level. There are four general categories of students: First, students from expatriate families. Second, "experience-driven" students who spend half to one academic year abroad, often between the ages of 16 and 18 and as part of organized exchange programs. Third, "quality-bound" students whose parents send their children abroad relatively early on in order to attain a high quality secondary education. Fourth, "elite" students accessing high cost and presumably high quality private schools.

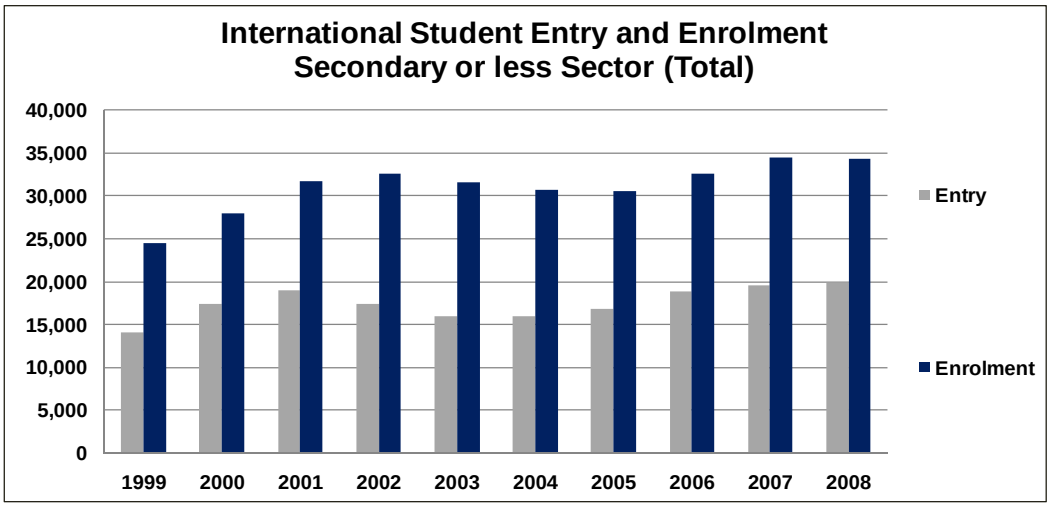
Relevant destination countries in this sector are Australia, Canada, New Zealand, Switzerland, the UK, and the US. One important factor when choosing a destination country is language. As a result, English-speaking destinations traditionally have been the most popular receiving countries. Another factor is the quality of the schooling. With the exception of the US, all other mentioned countries have scored highly in the OECD's 2008 PISA survey. The US attracts students based on both experience and elite grounds, the latter in private schools and academies.

The graph below shows the development of entrants and enroled students in Canada from 1999 to 2008, a period during which total entry and enrolment numbers increased by about 40%. Entry rose from about 14,000 to more than 19,800, while enrolments increased from more than 24,500 to nearly 34,400.

Entry numbers declined from 2002 to 2004, most likely due to a combination of the SARS scare in late 2002 and early 2003, as well as to economic problems in a number of sending countries.

The leading indicator, the dynamic of entry numbers, is clearly evident in the schooling sector with entry trends moving enrolment numbers one year later on.

### International Student Entry and Enrolment in the Secondary or Less Schooling Sector (Total, 1999-2008)

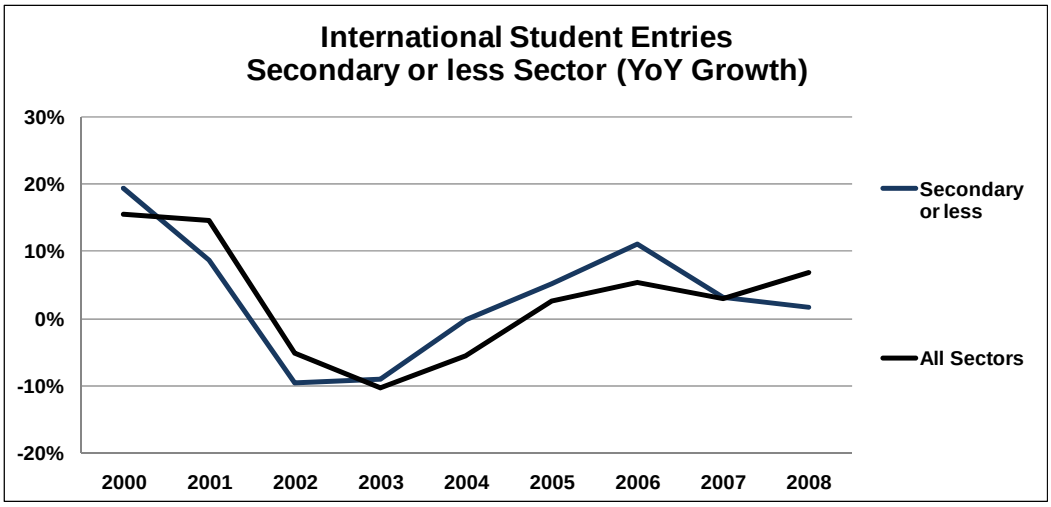



Source: CIC.

## Entry Performance

The graph below shows the rapid year-over-year drop in entrants between 2000 (increase of 19%) and 2002 (drop of 10%).

### International Student Entry in the Secondary or Less Schooling Sector (YoY Growth, 2000-08)



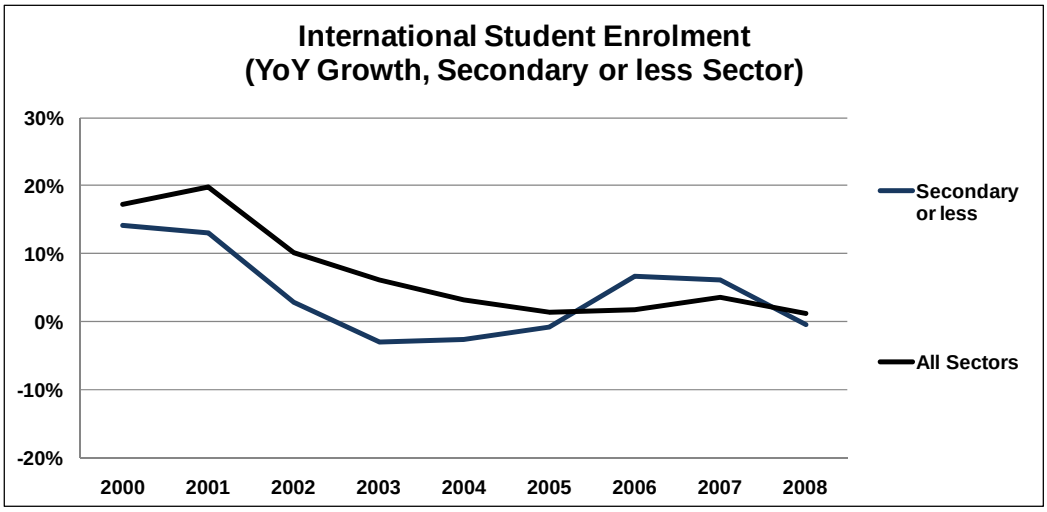

Source: CIC.

Since 2005, entry figures have grown each year, but at increasingly lower, single digit rates. Compared to the overall trend for all sectors, schooling entry rates are somewhat more volatile.

## Enrolment Performance

When analyzed on a year-over-year development basis, secondary or less schooling enrolments have followed the entry figures change dynamics with the aforementioned time lag (see below graph). As a result of the often multi-year nature of enrolment figures, fluctuations are somewhat smoothed out. Overall enrolment growth has been modest since 2002 at a total rate of less than 6%.

**International Student Enrolments in the Secondary or Less Schooling Sector (YoY Growth, 2000-08)**




Source: CIC.

## Perspectives

The Canadian secondary schooling sector should be attractive to international students given its high quality, safety, welcoming culture, and the fact that it offers instruction in both English and French, something that appeals to different market segments.

Successful recruiters in this sector have driven enrolments from four brand positions.

First, a strong global brand. This applies especially to a number of UK and Swiss schools and academies.

Second, an experience-based proposition. The US attracts large numbers of exchange students through this approach.

Third, strong marketing practices. Especially Australia but also the UK have distinguished themselves through their marketing practices.

Fourth, overall educational quality. New Zealand and on some level Australia have pursued this approach.

Canada's lack of an internationally recognized strong schooling brand is a major impediment to raising Canada's market share of international students at the secondary schooling level. With the core underpinning of system-wide quality in place, a better articulated and more actively promoted brand should have positive effects.

## Trade Sector

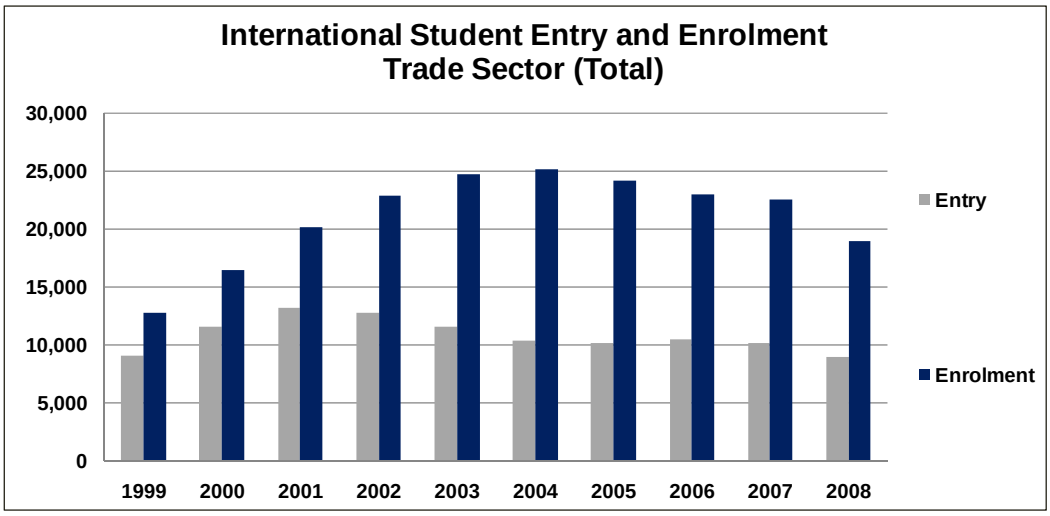
### Introduction

Amongst sectors in international education, the trade (vocational) sector plays a somewhat amorphous role. For one, it can be highly country- and workplace-specific in the way it is structured and how curricula are designed. Often, it is geared towards fulfilling labour force entry qualifications set by guilds, associations, or unions – which makes such training typically less portable.

In many instances, trade and/or vocational training is taught in a country's native language. A key attraction to international students of course is instruction in English which has seen the – highly adaptive – vocational education and training sector in Australia more than double enrolments since 2005.

Many components of trade training are also tied into commercial partnerships. Germany's *Duales Berufsausbildungssystem* has been widely acknowledged for its quality and close alignment with German industry. Despite this acclaim, it has not attracted large numbers of students from outside Germany. In 2005, less than 35,000 international students were enroled in the *Duale Berufsausbildungssystem*, the vast majority of whom were recruited from non-German citizens residing in Germany.

**International Student Entry and Enrolment in the Trade Sector (Total, 1999-2008)**



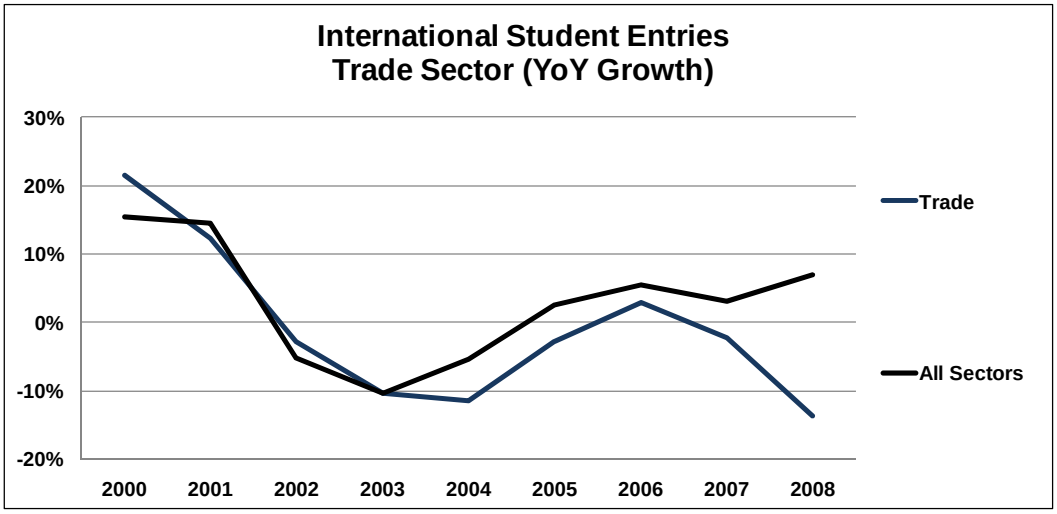

Source: CIC.

As the above graph shows, enrolments in the Canadian trade sector more than doubled from approximately 12,800 (1999) to nearly 25,200 (2004), only to consistently recede to just under 19,000 (2008). Entry figures peaked at close to 13,200 (2001), but slipped below 1999 levels at less than 9,000 (2008). If trailing indicator dynamics hold, this sector will continue to see enrolment declines in 2009.

Entry Performance

Student entry rates, as the following graph shows, have seen a precipitous drop since 2000. The year-over-year growth rate in 2000 stood at 21%, but dropped to -14% by 2008. Since 2001, only one year (2006) experienced positive year-over-year growth. As a result of this downward performance trend, 2008 entry figures were lower than 1999 figures.

International Student Entry in the Trade Sector (YoY Growth, 2000-08)

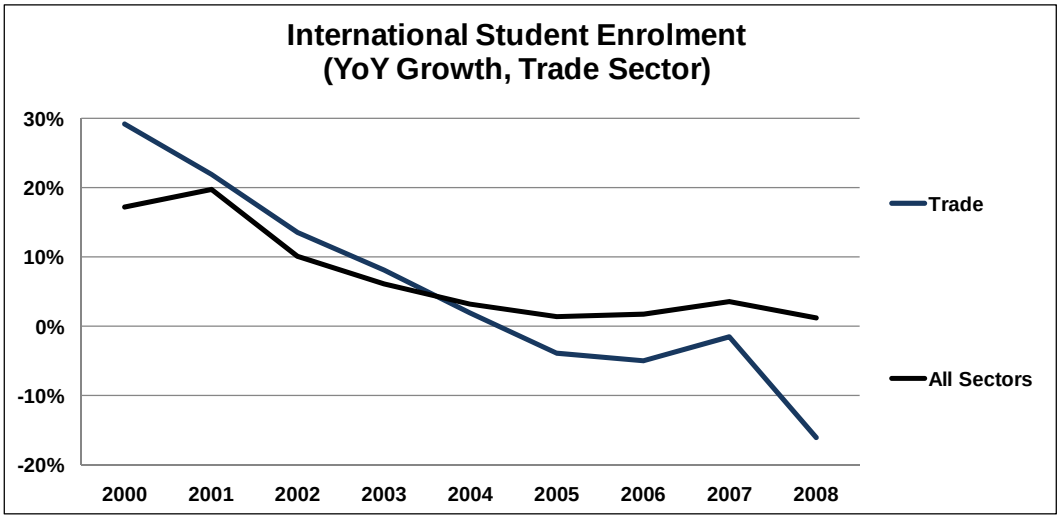



Source: CIC.

Enrolment Performance

Trade sector enrolment year-over-year growth rates, as the above graph shows, have seen a nearly uninterrupted decline since 2000 and reached negative territory in 2005. The year-over-year growth rate in 2000 stood at 29%, but dropped to -16% by 2008. Since 2001, only one year (2006) experienced positive year-over-year growth. The initial growth rates contributed to enrolments effectively doubling between 1999 and 2005. By 2008, enrolments had lost about one quarter in strength.

International Student Enrolments in the Trade Sector (YoY Growth, 2000-08)




Source: CIC.

Perspectives

Recruiting international students into trade and vocational education has proven to be a strong growth sector if underpinned by competitive offerings and a concerted marketing effort. From a supply perspective, Australia in particular has taken a lead in this sector by focusing on subjects such as tourism, information technology, nursing, design, and media.

From a demand perspective, the pool of students who are willing to invest into high quality vocational up-skilling has grown in recent years. It is bound to grow even more strongly in the future owing to increasing capability requirements in the workplace and an increasing willingness on the part of students to invest in their skills portfolio.

The fact that the Canadian trade sector has experienced lower entry rates in 2008 relative to 1999, as well as a corresponding decline in enrolments since 2004, raises questions about the relative attractiveness of the trade sector to international students. In contrast, enrolments in Australia increased by 493% from 1999 to 2008.

Given the growing importance of this sector from a workforce skills base perspective, coupled with the long-term need for skilled migration into critical service industries such as healthcare, a further analysis of the precise level of international competitiveness of this sector is warranted.

## Other Post-secondary Education Sector

### Introduction

An emerging growth story in international education is the segment between basic trade and vocational education and traditional, university-based higher education. As such, this segment is not vocational in nature but either preparatory for university-level studies, or of an applied nature.

From an international student recruitment perspective, preparatory programs have become a quite important product offering. Many international students who are intellectually capable nonetheless often find themselves struggling with a host country's higher education institutions' curricula and quality levels.

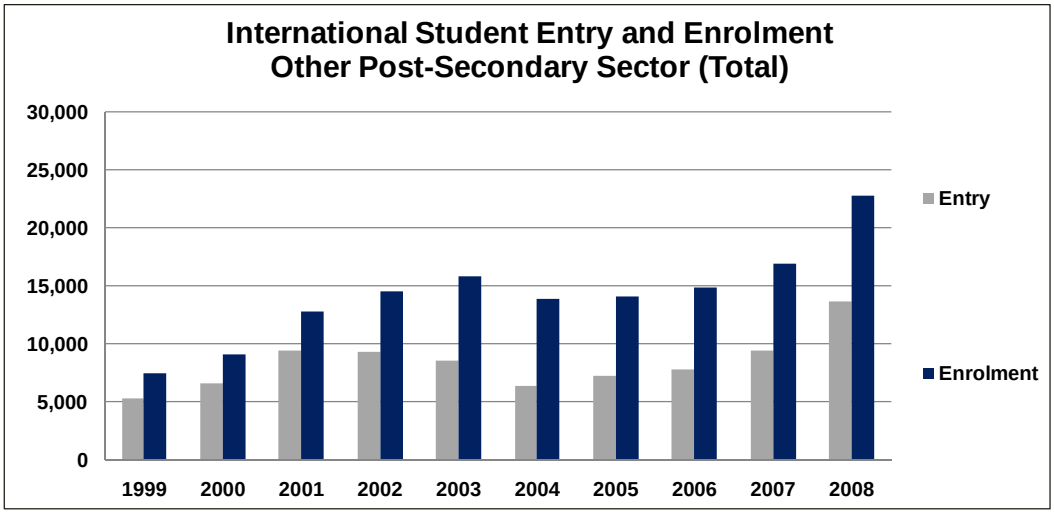
Preparatory or foundation year programs offer a bridging function which eases the transition pressures on a student and allows a higher education institution to enforce quality standards in an external setting, thereby minimizing institutional risk exposure. Foundation years have seen strong enrolment growth globally in differing formats and under a range of monikers.

Applied degree studies are also gaining in relevance for international students. A significant portion of the growing number of international tertiary students is characterized by somewhat less academic ambitions and capabilities. Many of these students tend to look for a workforce-geared education with clearly prescribed labour market entry outcomes.

The other post-secondary education sector – despite its amorphous nature – has been a success story for Canada as the following graph highlights. Entry increased from nearly 5,300 (1999) to more than 13,600 students (2008).

Enrolments correspondingly increased nearly three-fold from around 7,400 (1999) to more than 22,700 students (2008). Further interpretation is not possible without a more granular data set which was not provided by CIC.

### International Student Entry and Enrolment in the Other Post-secondary Sector (Total, 1999-2008)

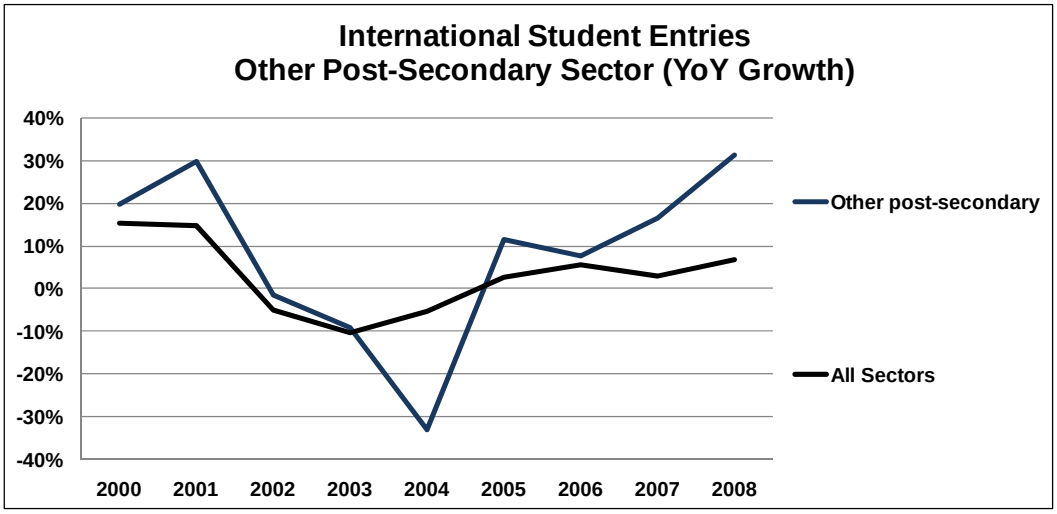



Source: CIC.

## Entry Performance

This sector is subject to a high degree of volatility in year-over-year student entry trends: From 2001 to 2004, growth rates dropped from 30% to -33%, only to recover to 31% growth in 2008.

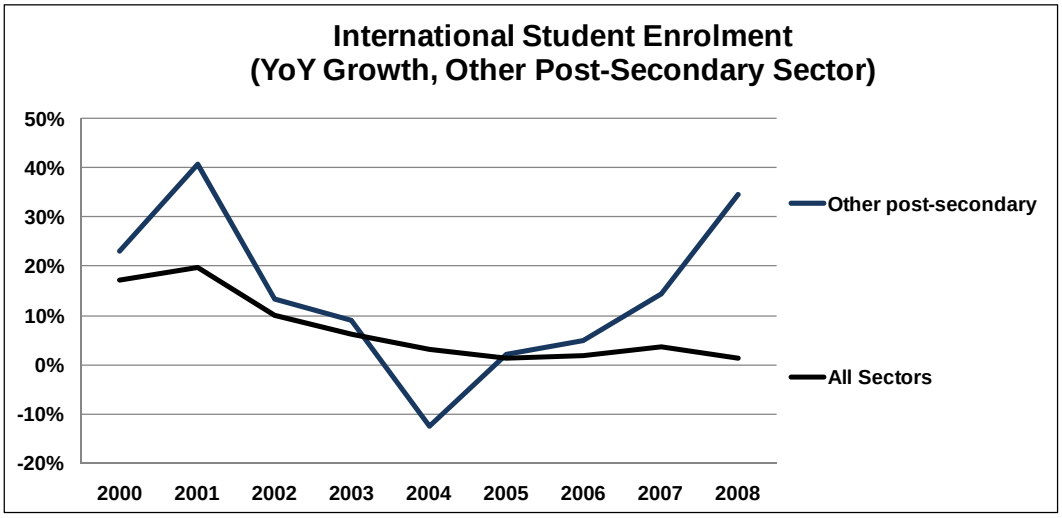
### International Student Entry in the Other Post-secondary Sector (YoY Growth, 2000-08)




Source: CIC.

How much of these fluctuations has been due to external factors such as SARS and economic crises, and how much is reflecting data definition and consistency issues is impossible to determine.

**International Student Enrolments in the Other Post-secondary Sector (YoY Growth, 2000-08)**




Source: CIC.

## Enrolment Performance

Enrolment year-over-year growth rates closely mirror the above displayed entry dynamics. A further analysis is not possible.

## Perspectives

Demand for short- to medium-term post-secondary education, whether based on an up-skilling such as is prevalent in foundation years or a more practically oriented degree, is bound to increase. Canada seems well positioned to benefit from such a demand increase given the diversity of its offerings in this tertiary education segment. Given the potential (or actual) feeder function of this sector into other tertiary sectors, specific attention should be paid to trend developments.

## University Sector

### Introduction

A country's higher education sector, or in this case in the more narrow CIC definition the Canadian university sector, has traditionally taken the lead in recruiting international students, as well as providing for other aspects of internationalization such as out-going student mobility. The reasons for this are three-fold.

For one, higher education historically has commanded a lion's share of resources and policy attention which served as a critical enabler for international activities of any kind.

Secondly, universities have engaged in mutually reinforcing international relationship practices such as collaborative research by faculty members, or by holding membership in international alliances.

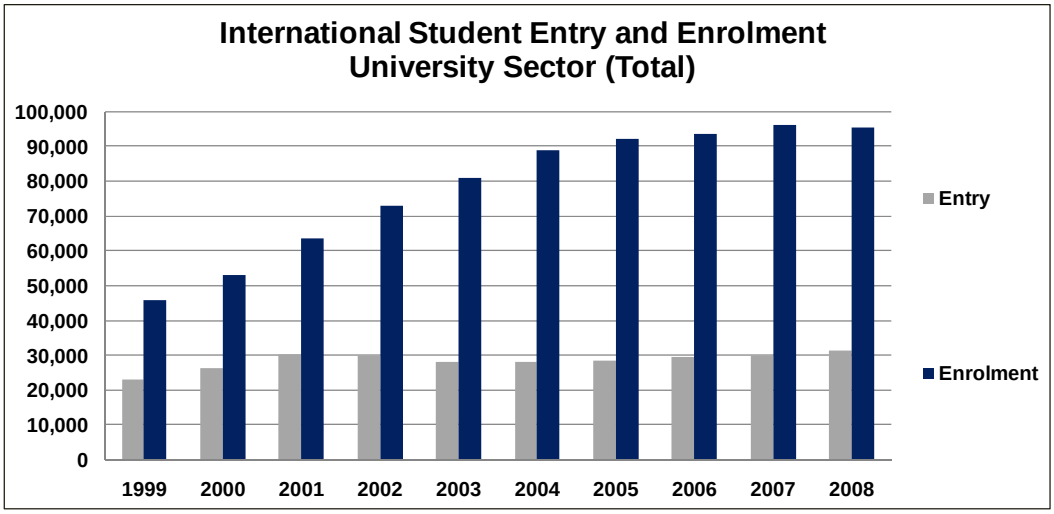
Thirdly, businesses and policy-makers have placed more emphasis on the university sector based on its potential to contribute to a nation's economic development through innovation and research transfer – and by attracting the purchasing power of international students.

Canada's international student recruitment dynamics at the university level have matched the above described factors, resulting in Canada being the sixth most popular destination for (tertiary) international students in 2007 according to the OECD.

Enrolments, as the below graph shows, more than doubled from about 45,700 (1999) to around 95,400 (2008) as the below graph depicts. Enrolment growth, however, came to a halt in 2005 and in 2008, enrolments actually dropped.

Entry figures also increased by more than a third, from nearly 23,000 (1999) to close to 31,400 (2008), but much of this growth occurred prior to 2001.

International Student Entry and Enrolment in the University Sector (Total, 1999-2008)

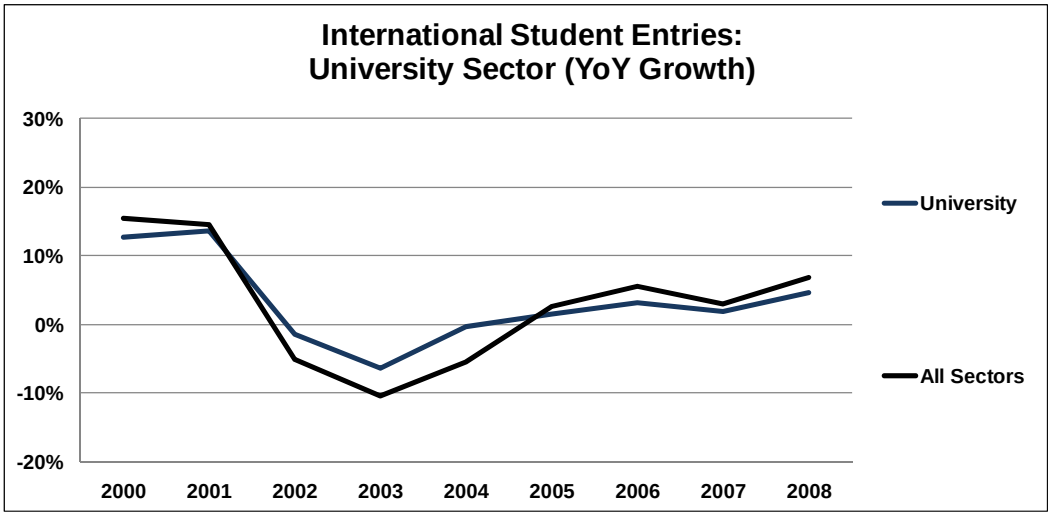



Source: CIC.

## Entry Performance

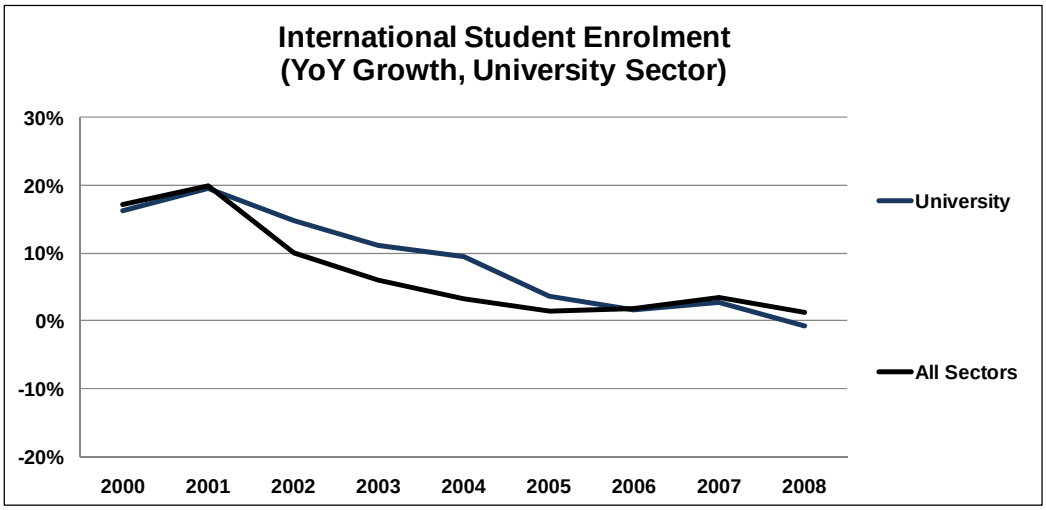
International student entry rates, as the following graph shows, fall into three time periods: Strong growth in 2000 and 2001; a notable drop into negative territory in 2002 and 2003 (partially due to SARS and the economic crises in some source countries); and a slow, low single digit gain since 2004. On a technical level, positive momentum is visible, albeit at a low level.

International Student Entry in the University Sector (YoY Growth, 2000-08)




Source: CIC.

International Student Enrolments in the University Sector (YoY Growth, 2000-08)




Source: CIC.

Enrolment Performance

Year-over-year international student enrolment growth in the university sector can be characterized by a long-term decline trend. A part of this

decline is simply based on the growing population pool vis-à-vis declining future growth rates logic.

In addition, growth rates of up to 20% such as those observed in 2001 were not sustainable in the Canadian context. But it is worth noting that actual enrolments have nearly stalled since 2005 with growth rates hovering in the low single digits before dipping below zero in 2008.

Perspectives

Canada's university sector has proven to be an attractive option for many international students. The long-term rise in enrolment numbers is testament to this fact. But this enrolment increase, as was previously discussed, has largely been driven by a reliance on a few source countries, notably China, South Korea, and more recently India and Saudi Arabia.

These source countries are also targets of many other countries' marketing and recruitment efforts while they, simultaneously, are building up domestic capacity. It is seems likely that these markets will begin to yield fewer and fewer talented students to a given destination country based on the larger number of actively promoted destination options.

Given the importance of attracting (highly) talented, mostly graduate level international students into STEM and other critical skills subjects, it has yet to be determined whether Canada has actually attracted large numbers of top international student talent or not. Anecdotal evidence suggests that the academically most capable internationally mobile students still prefer to enrol in elite US and UK universities, or access alternatives such as Germany's Max-Planck Institutes.

While Canada is home to a handful of globally competitive research universities, none has managed to build a corresponding academic brand which would make it an automatically sought-after destination. Given the media, policy, and growing consumer focus on global academic success and brand names this is an issue which will require further consideration. The *Our universities can be smarter* article in Maclean's 28 July 2009 issue reflected on this topic.

Aside from quality considerations, another trend is poised to emerge over the next five to ten years: Out-going student numbers in some currently leading sending countries will decline – a trend already experienced in

other countries such as Hong Kong, Taiwan, or Malaysia – owing to a combination of domestic capacity build-up and age cohort shrinkage.

Some educational marketing agencies and higher education institutions have grasped this transition scenario and have begun to proactively focus on “frontier” countries which have the potential to send out increasing numbers of students well into the future. The Canadian universities’ international student recruiting landscape does not seem to be well prepared for this scenario.

## 4.3 Overview of Key Canadian Entities Involved in International Education Marketing

### Introduction

The following listing of organizations involved in international education marketing – directly or indirectly – focuses on ten key entities. Entities are grouped by function and/or role: Governmental bodies, sector bodies, stakeholder bodies, and private bodies. Another 27 institutions, organizations, and stakeholder bodies are listed in the Appendix.

The brief institutional capsules are largely based on source material, and do not reflect a separate analysis, verification, or evaluation. Adopted source material is not marked with quotation marks in order to allow for better legibility. The below list is organized alphabetically.

### 4.3.1 Governmental Bodies

Citizenship and Immigration Canada (CIC)

Citizenship and Immigration Canada (CIC) is a federal government department responsible for all citizenship and immigration issues, including international student issues. CIC's mandate includes providing entry permits to immigrants, foreign students, visitors and temporary workers to Canada, and helping newcomers adapt to Canada and become integrated citizens.

On its website, CIC provides information on obtaining study visas, work permits, and citizenship, as well as guides on avoiding fraud, and on what to do before and after arriving in Canada. It provides resources to help students and others apply for certain permits, calculate application fees, pay application fees, and monitor their files' progress.

CIC also plays a role in enhancing the economic, social, and cultural integration of immigrants, as part of its Multiculturalism Program. It should be noted that CIC is not in charge of Canadian border entry/control – that is under the purview of the Canada Border Services Agency (CBSA).

Website: www.cic.gc.ca

## Department of Foreign Affairs and International Trade (DFAIT)

The Department of Foreign Affairs and International Trade (DFAIT) is mandated to ensure that Canada's foreign policy is in alignment with its values and national interests, to strengthen trading agreements, and to work with partners within and outside the Canadian government to better Canada's economy and security.

One of DFAIT's divisions is International Education and Youth. It provides information, including program and funding information, for both Canadians and foreign students. This division manages several programs, including *Education au/in Canada*, the national education marketing platform.

The Education au/in Canada website is geared toward students, providing visa information, an education cost calculator, information on the different available programs on working while studying, on scholarships and other funding options, and on what life in Canada is like.

In its website's international scholarships section, DFAIT provides a searchable database of funding opportunities, categorized by applicant type (student, researcher, faculty, professional, or institution) and country of origin and destination. Many of these are opportunities funded by DFAIT, but it lists options from other institutions and foundations as well.

In its youth program section, DFAIT provides information on travel and work opportunities for internationals in Canada and for Canadians abroad. For non-Canadians, this includes working holidays, young professional work opportunities, and international cooperative education programs.

One of the programs under the Youth and Education division is the Understanding Canada Program, launched in 2008. This program aims to raise Canada's profile by offering grants to both research organizations and individual academics who want to work on areas in Canadian studies. This program is jointly offered by DFAIT and the International Council for Canadian Studies (ICCS).

In 2007, the Canadian government announced funding of CAD 2 million over two years (five years budgeted) to support the development of the Edu-Canada Initiative. DFAIT was mandated to develop a Canadian education brand and launch a Canadian education marketing campaign in conjunction with the provincial governments and private organizations. The *Imagine Education au/in Canada* brand was developed and

subsequently launched at the September Council of Ministers of Education Canada (CMEC) meeting.

Two years later, DFAIT submitted a proposal for the Edu-Canada II Initiative, requesting additional funding (CAD 9.5 million a year) to expand the marketing campaign. The strategic foci of the proposal were to target key markets (China, India, Brazil, USA) by developing Canadian Centres of Excellence, scholarship programs, alumni networks, and Web 2.0 development; to strengthen Edu-Canada's international network by creating new positions in particular missions abroad; to engage in brand training and research; and to create a cost-sharing program between DFAIT and Canadian universities, colleges and NGOs to support and unify their international promotional activities.

Recent Canadian Government programs include:

- The Canada Excellence Research Chairs Program (CERC), which provides awards of up to CAD 10 million over seven years to 20 successful applicants for the establishment of research programs in Canada, in a bid to attract top academic talent. The first round of winners in the program's initial phase was announced in April 2009, narrowed down from forty proposal submissions received from 17 universities.
- The Vanier Canada Graduate Scholarships Program (Vanier CGS), a doctoral scholarship which funds recipients at CAD 50,000 a year, aimed at attracting talented doctoral students. The first 166 recipients comprised 129 Canadian students and 37 international students. These scholarships are administered by three federal granting agencies (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council, and Social Sciences and Humanities Research Council), and will award 500 scholarships over three years.
- The Knowledge Infrastructure Program (KIP), a federal initiative and a part of Canada's Economic Action Plan (announced January 2009), which aims to invest CAD 2 billion in the renewal and improvement of Canada's higher education infrastructure.
- Allocating CAD 750 million of new funding to the Canada Foundation for Innovation (CFI) in the 2009 Budget, to support a "leading-edge research infrastructure," comprises a CAD 150 million increase in funding for competitive research projects and CAD 600 million for CFI's future activities, which potentially include the launch of new research project competition(s).

Website: www.international.gc.ca

Council of Ministers of Education, Canada (CMEC)

The Council of Ministers of Education, Canada (CMEC) is an intergovernmental body that serves as a forum for policy issue discussion, a mechanism for the undertaking of joint projects, a means of consultation with national education organizations and the federal government, and an instrument to represent the provinces' and territories' education interests abroad.

Among other work, CMEC develops reports on education indicators, sponsors research on education, administers Canada's national official-language programs, and represents provinces and territories to education-related international bodies. It also operates CICIC.

In 2008, CMEC released *Learn Canada 2020,* a ministerial statement jointly commissioned by the members of the council which addressed the provinces' responsibilities in upholding lifelong learning. Learn Canada 2020 urges provinces and territories to work in collaboration with key stakeholders to benefit all Canadians. The ministers also identified eleven key areas on which to focus one of them being international education.

In 1986, CMEC and the Secretary of State for External Affairs established the Federal-Provincial Consultative Committee on Education Related International Activities (FPCCERIA). It serves as an advisory body, to encourage discussion between the federal and provincial/ territorial governments.

Topics of discussion at FPCCERIA meetings most frequently include foreign students in Canada, the recruitment of foreign students to Canada, the international marketing of Canadian education, and international student visa issues. FPCCERIA was also the forum in which the establishment of the Canadian education brand was discussed.

Website: www.cmec.ca

### 4.3.2 Sector Bodies

Association of Canadian Community Colleges (ACCC)

ACCC is a national voluntary membership organization. It represents Canadian community colleges and institutes to government, business, and industry bodies, both in Canada and abroad. It liaises with federal agencies and departments for its members, and links colleges to national industries. It also provides its members with networking and professional development opportunities in the form of conferences and workshops for college staff, students, and board members.

ACCC administers multiple programs, including an award for excellence program, a joint program with the Canadian Forces (CF) that aims to match learning requirements between the CF and Canada's colleges and institutes, and a student mobility program that supports the development of student exchanges between Canadian provinces and territories. On its website, ACCC compiles a list of sector career opportunities, for the use of both job-seekers and employee-seekers.

Website: www.accc.ca

Association of Universities and Colleges Canada (AUCC)

The Association of Universities and Colleges Canada (AUCC) is the national association for Canada's universities and university-degree level colleges, representing 91 institutions. It is involved in public policy advocacy, research on higher education, and offers scholarships and international programs.

Among AUCC's recent advocacy and research work are:

- *Internationalization of the Curriculum: A Practical Guide to Support Universities' Efforts* (March 2009), an intended "primer and checklist" of best practices in university internationalization. Its findings and suggestions are based on research and outreach activities conducted by AUCC over the last two years, including two surveys of Canada's universities conducted in 2000 and 2006.
- Presentations to the House of Commons Standing Committee on Finance (August 2009), to the House of Commons Standing Committee on Official Languages (March 2009) and to the House of Commons Standing Committee on Finance (February 2009).

- In an August 2009 presentation, two of AUCC's three recommendations were to increase university research investment through granting agency programs, and to invest in an international student recruitment and marketing strategy (with suggested funding of CAD 20 million for each of the five years).
- AUCC hosted three international meetings recently: "The Bologna Process and Implications for Canada's Universities," "Bringing an International Dimension to the Curriculum of Canadian Universities," and "Current and Future Programming with CIDA."

AUCC administers over 150 national and international programs on behalf of private sector organizations, foundations, and governments, covering scholarships, fellowships, and internships. Some of these programs are products of bilateral partnerships, while others are multilateral and multi-regional in scope.

Website: www.aucc.ca

Canadian Association for Public Schools - International (CAPS-I)

The Canadian Association for Public Schools - International (CAPS-I) is a non-profit society. Its 56 members consist of publicly-funded school districts or boards which offer established international student programs. These programs range in grade level from elementary to high school. The association advocates for public school international education and provides sector networking, professional development and marketing opportunities for its members.

It is mandated to act as a forum for sharing information and collaborating in public sector international education, support K-12 international student programs, engender a united Canadian approach to international education practices, coordinate joint marketing initiatives, and collaborate with provincial and federal governments and international educational groups within and outside of Canada.

Its website provides information assisting potential international students with finding a school in Canada, and also gives some instructions on the application process.

Website: www.caps-i.ca

## Languages Canada

Languages Canada, which represents over 130 study locations in Canada, was formed in March 2008 after the merger of the Canada Language Council (CLC) and the Canadian Association of Private Language Schools (CAPLS). It is a member association representing Canada's language training sector.

Its mission is to promote accredited and high quality English and French training in Canada. Its larger goal is to make Canada the ultimate worldwide destination for the study of French and English. Its member's language programs, both in French and English, must be accredited under the association's quality assurance scheme, which is recognized internationally. This scheme covers curriculum, teacher qualifications, student services, student admissions, marketing, promotion, facilities and administration.

The Languages Canada website, which is available in twelve languages, provides certain resources, such as best practices documents for providers and a searchable member school directory for students to browse.

Languages Canada also holds an annual conference, where it develops its strategic plan for the year ahead. The conference also features plenary lectures and professional development seminars on marketing, student experience, leadership, and technology.

Website: www.languagescanada.ca

## National Association of Career Colleges (NACC)

The National Association of Career Colleges (NACC) is an incorporated non-profit association of organizations in the private career training sector in Canada. It has two categories of membership – active members are private career training institutions, and associate members are companies offering products or services to those institutions.

Its mandate is to promote the interests of its members and their students nationally, as well as to promote excellence in the private career training sector. Its activities include an annual conference, curriculum and examination services to members, quality assurance initiatives, best practices guides, and various research and survey projects.

It also provides an online career guide for students. NACC is the umbrella organization for affiliated career college associations that exist in Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland & Labrador, Northwest Territories, Nova Scotia, Ontario, Prince Edward Island, Quebec, and Saskatchewan.

Website: www.nacc.ca

### 4.3.3 Stakeholder Bodies

Canadian Bureau for International Education (CBIE)

The Canadian Bureau for International Education (CBIE) is a non-profit, non-governmental membership association. Its members are institutions and individuals engaged in international education, both in terms of education practice and policy, such as school boards, universities, government agencies, and private businesses. Its membership is open to K-12 through post-secondary, public and private institutions.

It works to promote the internationalization of education and the expansion of educational partnerships between Canada and other countries. CBIE services include the management of foreign government-sponsored scholarship programs in Canada, professional training in Canada and overseas, and managing foreign education institutions based on Canadian educational expertise. CBIE holds an annual conference and has produced various publications for international educators.

It provides professional development seminars to members, administers grants for students and professionals, and engages with member faculties and administrations in research and project work. It also collaborates with several developing nations, where it designs and manages projects which its overseas partners help to implement.

CBIE's international development programs focus on building of institutional governance capacities, the strengthening of civil society, and the development of democracy.

CBIE administers several scholarships and award programs on DFAIT's behalf, for both outgoing Canadians and incoming international students. For international students, CBIE also administers the CETAA program in partnership with the Canadian International Development Agency (CIDA), and administers the Kuwait Undergraduate Scholarship on behalf of the Kuwait Ministry of Higher Education. CBIE also offers its own International Student of the Year Award, which rewards the best letter written by an international student about their experiences in Canada.

Online, CBIE produces destinEducation.ca, an informational website which assists Canadian students, international students, and education professionals with planning their work or study abroad. The website includes a directory of Canadian schools, project opportunities, and links to government and financial resources. Much of the site functions largely as a consolidation of the relevant external resources to which it provides links.

In collaboration with several developing countries, CBIE designs and manages projects aimed at building institutional and governance capacity, strengthening civil society, and developing democracy. It is active in Central Europe, Ethiopia, Ghana, Mali, Senegal, Armenia, Azerbaijan, Georgia, and Ukraine.

CBIE offers customized services to governments, private organizations, and member educational institutions on a partnership basis, with projects that combine the partners' sector knowledge and CBIE's organizational expertise. These services include professional development training for education practitioners and policy makers, educational institution development and management abroad, and scholarship administration.

Website: www.cbie.ca

National Education Marketing Roundtable (NEMR)

The National Education Marketing Roundtable (NEMR) brings together more than 50 stakeholder and related associations, governmental departments, as well as the provinces and territories, for discussion on education marketing issues:

- National associations represented include: ACCC, AILIA, AQEF, AUCC, AUFC, CAGS, CAIS, CAPS-I, CBIE, CECN, CeLEA, CETAC, CIDE, CFS, CHEC, CICIC, CMEC, CNIE, CSTD, IEAC, LC, NACC, PC, RCCFC, and WUSC.
- Regional Associations represented include: AAU, BCCIE, CEGEP International , CREPUQ, Éducation internationale, EduNova, LearnNB (& CSTD NB), Alliance numériQC - Alliance eLearning, MCIE, and IPSEA.
- Provinces and territories represented include: Alberta, British Columbia, Manitoba, New Brunswick, Newfoundland and Labrador, Northwest Territories, Nova Scotia, Nunavut, Ontario, Prince Edward Island, Québec, Saskatchewan, and Yukon.
- Other Government Departments represented include: CIC, CIDA, DFAIT, Indian and Northern Affairs, Industry Canada, Health Canada, HRSDC, PCH.
- Other organizations represented include: NAFSA Canada SIG.

Website: No official website is available.

### 4.3.3 Private Bodies

Canadian Education Centre Network (CECN)

As mentioned previously, CECN announced on 30 June 2009 that it would cease operations. Since then, most of its domestic operations have been shut down while most country offices seem to have continued to operate. At the time of research close for this report in mid-September, CECN was effectively underwritten by a private entity.

In the following, a general capsule of past CECN activities is provided to allow for (historical) context. Given the continued changes at CECN, information may no longer be valid at the time of release of this report.

The Canadian Education Centre Network (CECN) is a non-profit, private company originally founded with Canadian government support in 1995, with the mandate to engage in the promotion and marketing of Canada's education system abroad. CECN stakeholders are its fee-paying member institutions, which number at approximately 200. It works through 13 Canadian Education Centres and four sub-offices located internationally. CECN was deemed to be self-sufficient and thus stopped receiving core government funding at the end of FY 2004-5.

In its marketing capacity, CECN manages StudyCanada.ca, a student-oriented informational and marketing website available in 15 languages. Its domestic events include the annual Go Abroad fairs in Vancouver and Toronto which advertise study, work, and volunteer programs abroad for Canadian students, an annual International Education Conference, and an annual Agent Fair.

It also hosts Canadian Pavilions and other presences at education fairs internationally – its intended 2009/10 circuit includes events in Europe, Southeast Asia, the Gulf Coast, Mexico, Brazil, China, Hong Kong, and India.

In terms of overseas presence, Centres supply advertising and application materials, provide guidance counselling, and organize pre-departure orientations for students. They also act as points of contact between international students and Canadian institutions through fairs and similar events, and conduct in-country market research through outreach to local schools.

In 2008, CECN, in conjunction with stakeholders and partners in the international education sector, developed a Strategic Plan to focus the

organization's efforts over the next 12-18 months. Among other objectives, this plan involved the intention to decrease expenses by CAD 0.5 million in the short term and CAD 1 million in the long term, by closing the Vancouver office and redirecting all Canadian operations to the Toronto office, and by closing an additional four overseas offices. It also sought to increase revenue through member recruitment, increased offerings of member services, and the identification of alternative revenue sources. It also intended to pursue long-term funding from the federal government through DFAIT.

Websites: www.cecnetwork.ca, www.studycanada.ca

# 5. COMPONENTS OF AN INTERNATIONAL EDUCATION MARKETING LANDSCAPE

## 5.1 Factors Driving International Student Marketing Trends

In recent years, more and more countries have drawn up policies aimed at improving their education systems and promoting their attractiveness to the rest of the world. One commonly hoped for goal is an increase in the number of in-coming (and sometime out-going) students and often researchers as well[42].

The motivating factors for these policies tend to be fairly similar though each country has a unique way of weighing these factors. The latter, all of which are applicable to Canada, include:

- The transition to a knowledge economy requires an increasingly well educated, cross culturally aware workforce. English language proficiency is a related issue.
- Domestic talent pools in key academic areas (e.g., STEM subjects) are not sufficient to supply the higher education sector. Well understood long-term demographic dynamics will make this situation increasingly problematic in a number of countries.
- Similar to above, changing long-term skilled labour force needs in growing service sectors such as health care (e.g., nursing staff) which require immigration-based recruiting approaches.
- Innovation breakthroughs and entrepreneurship: "Elite talent" recruiting can result in subsequent out-sized contributions to science, research, and commercial activities (see California).
- Competition dynamics: Most leading industrialized nations have created specific talent acquisition programs. Some aim to repatriate domestic talent (e.g., Germany, China), others to attract international talent (e.g., Singapore), and in most cases a combination of the two. Opting out of this competition is not an option.
- Revenue generation aspects: International students contribute directly (e.g., tuition fees, living costs), as well as indirectly (e.g., family visits) to their host country's economy[43].
- Enhancing a country's position in the world through public diplomacy, personal relationship building, the expansion of economic linkages, etc.

[42] Some countries have drawn up or expanded on existing out-bound mobility programs. Examples include Germany, the Netherlands, and the US.

[43] The economic impact of international students in Canada is estimated at CAD 5.5 billion (expenditures, 2008). Source: Kunin, Roslyn. *Economic Impact of International Education in Canada*. 2009.

## 5.2 The Rationale for an International Education Marketing Agency

### Introduction

A number of different organizational models have emerged over the last couple of decades with regards to international education marketing. These models reflect a nation's different organizational and policy-making paradigms as well as the role of education as a public as well as private good. In the following, we identify four general models. It must be noted that categorizing existing agencies cleanly is not always easy.

For example, the DAAD essentially acts as a public agency despite legally being organized and governed as a membership-based club. It receives funding nearly exclusively from public sources (German and European Union). It is governed in a highly centralized manner by its Secretary General, and in many ways executes national foreign and educational policy mandates. Operationally, it draws on many part-time staff and leveraged faculty members. As such, the DAAD exhibits features which reach beyond a narrow definition of a public agency.

### Organizational Models

#### Governmental department/agency

A leading example for a governmental department or agency model is AEI in Australia. AEI has been a key contributor to the development of international education marketing for well over a decade. Well resourced, well staffed, and present in 25 countries, it has had the ability to substantially influence Australia's international education marketing practices.

One enabler has been its relative stand-alone nature in organizational terms. A drawback of this design feature, however, has also been a pronounced lack of connection to Australia's education institutions. This connection deficit has been further amplified by the implicit mandate to be "all things to all people". In a faster moving, increasingly more complex international education world this aspect has been unhelpful.

These issues point to the key disadvantage of a governmental department or agency model: A tendency to become more bureaucratic and less entrepreneurial, a rule-bound culture, a lacking ability to respond quickly and in a granular manner, potential politicization, and, most critically, an inherent disconnect from education providers. For these reasons, a governmentally-led model is not recommended for Canada.

(Outsourced) Network

An example of an outsourced network is educationUSA. Rather than an organization, educationUSA is a program supported by the Bureau of Educational and Cultural Affairs within the Department of State. Its more than 450 advising centers are run by a variety of organizations, including the Fulbright Commission, IIE, higher education institutions, foreign governmental agencies, or are located in US consulates and embassies.

Consequently, educationUSA has taken up a limited presence in the international education community owing to its highly fragmented nature. Questions regarding quality control, conflicts of interest, policy direction setting, and accountability have all loomed large. This model's general lack of organizational cohesion, coupled with the inherent conflict potential vis-à-vis organizations' economic interests when running advising centers makes this model unsuitable for Canada.

Non-Governmental Organizations (NGO)

Examples of such a model are associations such as CBIE, EAIE, or NAFSA. All these associations are involved in promoting international (higher) education. Most are organized as non-profit, membership-based organizations. None has a mandate to exclusively focus on promotion tasks. Rather, the organization of conferences, lobbying on behalf of members, training, and the advancement of practices in the international education field typically take precedence.

Given the often broad and amorphous nature of such associations' membership any focused promotion task would be difficult to organize. Moreover, in many instances members are also direct competitors with each other, or have little to no commonality with regards to their promotion needs. Thus, a NGO model is inherently constrictive. Reflecting these constraints, no NGO has established itself as a leader in the business of marketing international education.

Public Agency

The public agency model is the most common international education marketing model in place. Examples include CampusFrance, DAAD, or Nuffic. A key facet of the public agency model is its public sector-style design, its national interest-based mission, and funding model which effectively is based on public monies. Overall, public agencies have performed best in publicly-funded promotion approaches.

One important differentiation factor is the agency's scope. Some, such as the British Council, are not focused on education but carry out a broad public diplomacy as well as economic mandate. Others such as CampusFrance are entirely focused on the promotion of one education sector (here: higher education).

Not all public agencies have created a leading track record with regards to international education promotion activities. Nuffic and CampusFrance are generally acknowledged to have assisted their higher education institutions quite effectively (CampusFrance after it was converted from EduFrance). By contrast, the DAAD's strength in scholarship administration and relationship building has not translated into proficient marketing operations despite the "spin-out" of GATE Germany.

Lessons

Three lessons emerge. First, the fragmentation of marketing and recruiting delivery channels (such as the case in the US) is not conducive to a quality promotion performance. In Canada, the past organizational splitting of responsibilities between CBIE ("general promotion") and the CEC network ("recruiting focus") has similarly not been helpful.

Second, the scope, focus, and organizational design of a public agency matters. Large, multi-scope agencies tend to do less well with regards to pure promotion performance than smaller, more focused agencies.

Third, public agencies offer the highest degree of accountability with regards to the spending of public funds while typically interacting more closely with education providers than governmental departments do. It is for these and related reasons that a public agency model is being recommended.

## 5.3 International Education Marketing Components

### Introduction

This section summarizes key patterns in international marketing strategies of the most significant agencies in competitor countries. Possible marketing practices studied here are online marketing, print marketing, in-person marketing (either individual counselling or larger events such as fairs), and indirect marketing (such as communities of alumni and discussion forums).

It is not suggested that all of these activities need to be taken up by a to-be-created Canadian international education marketing agency. Rather, they should be understood as a menu of currently utilized tools, platforms, and strategies.

### Country Information

The most basic yet central facet of any international education marketing strategy is to pitch the country as a desirable study destination. AEI's Study in Australia presents Australia as a place to "Live," "Learn," and "Grow" – emphasizing not just Australia's academic and professional development opportunities, but its enjoyable lifestyle as well.

One of the communication mediums best suited to this category is online marketing, partly because of the variety of interactive tools it offers. AEI's website provides an interactive map that allows students to learn about Australia's different areas alongside a region-specific list of higher education institutions and programs.

ENZ's website provides visitors with a graphic interface, comparing New Zealand with key competitor countries in terms of costs of education and living, totalling the yearly savings.

The DAAD New York has created an DAAD YouTube channel, where it uploads videos of international students talking about their experiences in Germany. However, this foray in Web 2.0 marketing, given the DAAD's pedestrian execution, has been less than successful. Since July 2007, the channel recorded fewer than 1,400 views.

## Study Selection

It is essential for an international marketing agency to provide comprehensive and clear information about the institutions, courses, and programs available.

Given the variety and scope of course options, a comprehensive online catalogue of all possible activities is ideal. It may be browseable alphabetically or by institution, searchable by category or free-text entry, or organized based on contextual input.

Any catalogue must be simultaneously easy to use and appropriate for the context. The British Council uses a catalogue format that allows students to input several factors, thus narrowing down the search output. On the other hand, in countries such as Australia or New Zealand where options are finite, interactive, personalized and comprehensive search engines and wizard programs are possible.

Wider-scale, in-person marketing may prove better suited than individual in-person marketing, in larger events such as education fairs, in which nearly all key competitor agencies are involved:

- CampusFrance organizes Studying in France exhibitions, and Education Weeks abroad.
- ECA holds an annual International Education Week during which promotional events are held worldwide.
- The British Council holds over 50 education exhibitions internationally each year.

## Funding and Costs

Fee and funding information must be made easily accessible. The ideal scenario has the international education marketing agency provide a comprehensive list of all funding possibilities available to students. In countries where financial assistance programs are fragmented, an overview is nevertheless essential.

Again, given the volume of information, this category lends itself to online marketing. Most competitor agencies provide a catalogue of financial assistance options, including need-based assistance, scholarships, fellowships, and grants.

The format which agencies choose depends on the country context and overall marketing strategy. CampusFrance's online grant search engine is relatively small but interactive, in that students can either immediately see the full list, or narrow it down with one-click options. CampusFrance then provides details on eligibility criteria, value, duration, application process, and appropriate contacts.

Another essential issue is the cost of education and the cost of living. While agencies are unlikely to be able to list costs for individual students[44], they may redirect them to specific resources or try to provide aggregated information.

Nuffic provides expense averages as reported by international students in Holland, while the British Council, along with several other agencies, provides general cost-of-living estimates based on an average lifestyle in a given city.

In-person counselling offers an alternative. In-person counselling through agents, International Office staff, or counsellors to name a few can take a student's particular situation into consideration and provide individualized advice.

### Coaching and Counselling

An international education marketing agency should help students through specific coaching and counselling services.

Here, online marketing and in-person marketing may overlap – for instance, the agency may link students with guidance counsellors via online chats or provide contact details for country officers and local agents. Agencies also use country-specific websites to publish calendars of workshops, interviews, and education fairs.

A website itself may also be used to provide coaching and counselling. DAAD uses a personified animation called Dany, a "bot" that engages in an automated chat with students and then pulls up a page of results and links based on the conversation. It is a personable method of harvesting information in order to provide a tailored search result.

Print marketing still matters. Many agencies choose to provide counselling through publishing guides covering a wide range of topics: Guides to choosing the right institution and program, to a successful application, to

[44] However, most of the competitor agencies do try and manage to provide tuition range costs for many of the institutions listed in their database however

budgeting, to settling into the destination country, and so on. Fact sheets and step-by-step summaries are useful to alleviate students' concerns. These guides should also be made available online in PDF format or by turning them into e-newsletters.

### Applications

An important component of international education marketing is assisting potential international students during the application process. An agency can help through counselling or by making the application process simpler. This applies both to applications for courses of study and applications for scholarship or other funding programs.

The two primary mediums for this kind of assistance are online and in-person assistance. CampusFrance allows students from 20 countries to submit a single application to all of CampusFrance's (relevant) member institutions. It conducts French language tests when necessary, and includes this information in the student's application before submitting it to institutions.

For its scholarships, DAAD allows online applications, redirects students to external websites, or provides downloadable PDF application forms. Agencies can simplify the application process by providing contact details for each institution, as AEI, the British Council and educationUSA do.

In-person assistance sometimes involves the agency's local offices helping students with their applications. CampusFrance engages in this through their 108 CampusFrance Spaces (ECFs) worldwide.

Some agencies engage in credential evaluation, or direct individuals to third parties that do. AEI, for example, provides comparisons between Australian and foreign degree qualifications. Nuffic also functions as the Netherlands' qualification recognition centre, and evaluates the foreign qualifications of incoming internationals, translating them into comparable formats for the Netherlands.

### Entry Requirements and Restrictions

Assistance with information on entry requirements – both with regards to an education sector as well as with regards to the country – is a key task for an international education marketing agency. This includes information on how to apply for a visa or entry permit, and especially assistance with identifying required documentation.

Given the potential complexity of this issue, many interested students require an elevated level of information, counselling, and assistance. Detailed online information, packaged in an understandable format, has proven to be helpful. While in-person counselling can be highly effective, it requires that staff is properly trained in visa and immigration rules.

### Quality Assurance

Another key role for an effective agency is assuring potential students of the quality of a country's education systems. To this end, information about QA, accreditation, and job outcomes can be provided. This information can be easily provided through linked websites. Nuffic, for example, indicates which of the institutions and programs in its database have been accredited by the Netherlands accreditation organization, and which have been accredited by bodies in other countries.

### Possibilities After Graduation (Immigration and Work Permits)

Counselling should not end with the student's application or acceptance to a study program. Post-graduation support involves both channelling graduates into further study and into immigrant employment (if supported by a given country's government).

AEI advises international students on the Australian government's Skilled Migration program, linking to the Department of Immigration and Citizenship's more comprehensive overview. The British Council's "Study Live UK" guide includes a chapter to prepare students to stay on and work in the UK.

Online marketing is well-suited to this category because it allows the agency to redirect students to appropriate and more comprehensive resources. In-person counselling is also relevant in this context if it provides personalized guidance.

### Agent Training and Quality Control

In order to maintain the quality of its international education marketing services, many of the competitor agencies engage in agent selection, certification, training, and relationship building through country visits. AEI, for example, works with an Australian training organization to develop online agent training programs. Given the growing role of agents this is an important albeit well documented function.

## Language and Culture Adaptation

Linguistic and cultural adaptation is key when marketing to international students. This involves providing services in local languages as well as services which are tailored to a region's particular needs.

This occurs at all levels of the marketing process. The in-country agents' ability to speak the local language contributes to raising a students' and parents' comfort level. Organizers of education fairs and exhibitions held abroad should be mindful of the cultural context when planning events.

In terms of online marketing, providing country-specific sites, or local versions of the main website, trends to be powerful marketing tool. Translating a website into different languages increases the audience base, not just in terms of agencies and students, but also prospective students' parents who may be less familiar with English or French. To this end, AEI's Study in Australia site is available in 21 languages, CampusFrance's in 16, and the British Council's Education UK website in 12.

## International Representation

Over the last two decades, international education has given rise to a global cottage industry of fairs, missions, conferences, summits, and so on. On some level, it has become a quite challenge to determine the need and respective value from attending a given event. Event attendance of course is only an initial step. Leveraging attendance, especially at signature events such as NAFSA or EAIE, in a focused, concerted, and effective manner is of equal if not higher importance.

AEI, for example, offers Australian education providers a set of planning and networking tools at such signature conferences which are aimed at maximizing the impact of Australian promotional activities. Other agencies employ a wide range of conference add-on activities such as sponsored information and training sessions to pre-invited audiences.

Another role for an agency is to coordinate marketing messages with attendees from an agency's given home country. This has resulted in highly visible marketing support services such as centrally organized booth (which can run in the CAD 100,000s in total cost), or expert pre-conference training aimed at maximizing the impact of institutional promotion efforts.

## 5.4 Scoping Considerations

### Introduction

A fundamental policy decision which must be made is whether the new agency will cover all education sectors (schooling, language, vocational, higher education, other) or only some. If the decision is made to cover all sectors, it needs to be determined what the relative weight assigned to a given sector should be.

Most government-funded agencies (e.g., AEI, British Council, educationUSA) cover most or all education sectors, though most clearly focus on the tertiary sector and specifically the higher education sector. Membership-based organizations such as the DAAD tend to focus on one specific sector (here: higher education).

A publicly funded Canadian agency would be hard-pressed to avoid a broad sector representation model. However, it should clearly and openly set sectoral preferences. These preferences could be validated based on a combination of international student recruitment by sector, the economic impact of these students, and the strategic importance of certain student segments to Canada's economic development.

### Education Sector Focus

Primary focus: Higher education and research (universities, colleges). As a preliminary, broad estimate, about 60-70% of the focus of the new agency should be placed on this sector.

Secondary focus: Vocational, trade, career training. As a preliminary, broad estimate, about 15-20% of the focus of the new agency should be placed on this sector. Please note: This sector has the potential to substantially gain in importance (see Australia).

Secondary focus: Languages. As a preliminary, broad estimate, about 10-15% of the focus of the new agency should be placed on this sector. The feeder function of this sector into other education sectors should be supported.

Tertiary focus: Schooling (secondary level or less). As a preliminary, broad estimate, about 5% of the focus of the new agency should be placed on this sector. The feeder function of this sector into other education sectors should be supported.

## Definition of Marketing Role and Tasks

The concise definition of IEMA's role and tasks will be critical to the proposed agency's eventual success. It is recommended to avoid over-reaching by moving too many programs and responsibilities into IEMA. At the same time narrow-casting IEMA should be avoided, as should outsourcing too many tasks (especially strategic or brand control-related aspects).

## Role and tasks

Critically, IEMA should focus on international education marketing. It will take years to create a high performance organization. A diffuse focus or too many non-core tasks would be detrimental to IEMA's ultimate success.

IEMA should cooperate and align itself with Canadian stakeholder organization on a wide range of issues. Yet will require a distinct identity founded on specific roles and tasks.

Such roles and tasks should include:

- Brand development and control. IEMA should serve as the final arbiter on brand usage, and continue to develop the brand in close cooperation with other Canadian stakeholders.
- Analysis and development. IEMA should be in charge of the (on-going) gathering of market trends, expert analysis of such trends, and the development of response measures.
- Coordination. IEMA should serve as coordinator and/or leader of Canada's international presence in key marketing channels (conferences, web portals, etc.).
- Distribution. IEMA should outsource programs and tasks which are either not strategic in their nature (e.g., website development and hosting), or which can be undertaken more readily by other Canadian stakeholder organizations (e.g., scholarship administration).

## 5.5 Organizational Design

### Overall Organizational Design

IEMA's overall organizational design should be based on three characteristics:

- Independence. It is recommended that IEMA be given a considerable degree of freedom with regard to reporting to the Canadian Government. This will help avoid conflict scenarios (or the impression thereof), as well as assist with attracting and retaining high calibre marketing staff, and will contribute to a performance rather than a reporting culture.
- Non-hierarchical. IEMA should have a relatively flat, non-hierarchical organization chart in order to attract high quality marketers and expert staff members in key skills areas such as online community recruiting development.
- Broad stakeholder representation. IEMA should be classically structured into staff; a governance body which ensures stakeholder representation and oversight; and a set of advisory boards which would help drive program development and tactical issues. The latter should be tasked with a higher than usual degree of policy setting ability in order to ensure direct stakeholder input.

### Legal Model

A choice needs to be made with regards to the legal framework IEMA will operate under. Options include: A governmental agency (e.g., AEI), a public agency (e.g., CampusFrance, DAAD), a stakeholder association (e.g., NAFSA), a private trust with a public mandate (e.g., ENZ), a commercial entity (e.g., Hobsons), or a mixed model (e.g., IDP).

To this end, it is recommended that IEMA should be organized as a public agency. Similar to related agencies, it should be given non-profit status, and possibly formed as a Crown Corporation.

### Central versus Distributed Models

Most international education marketing agencies have built globally distributed delivery models through wholly owned or shared offices, partnerships with other agencies and providers, staff delegations and secondments, and so on.

It is recommended to design IEMA based on a distributed, granular, and balanced model:

- A head office in Ottawa with leadership team, central infrastructure, expert staff, etc.
- A number of in-market offices. These offices should be wholly owned and operated by the agency. 10-12 of such offices seem warranted by market and competition requirements.
- Well-informed DFAIT trade councillors, if possible coached by IEMA staff.
- Yet-to-be-created education councillors. These councillors would join embassy staff abroad based on a two or three year rotation model. Suitable candidates would be recruited from higher education and research institutions as well as from stakeholder bodies. Relevant expertise in the market or marketing approaches (ideally both) would be a requirement.
- Academic representatives in select target market higher education institutions (a model which the DAAD uses extensively and rather successfully).
- Deep partnering with similar agencies along the lines of the European BC-DAAD-NUFFIC partnership.
- A strong online presence driven by a portal and linkage strategy.
- The immersion in social online communities at a rapid pace to take advantage of unfolding branding and marketing opportunities.

## 5.6 Governance

### Introduction

Governance is probably the most challenging facet of the proposed agency. This is as much as policy, political, constitutional, and inter-personal issue. Therefore, setting up an adequate governance model will be crucial.

### The Role of the Provinces and Territories

Canada, as mentioned, is in a unique position with regards to its constitutional framework. Paragraph 93 of the Constitution, "Legislation respecting Education", regulates the Provinces rights with regards to educational provision within their own territory. The Federal Government, as determined in Paragraph 91, has the right to regulate trade. This has been interpreted as the right of the Federal Government to involve itself in the promotion of international education on behalf of Canada.

While legal considerations of course matter, a practical issue arises: The cooperation between the Provinces and Territories and the Federal Government based on common sense and external perspectives. Without doubt, a coordinated and collaborative approach is highly desirable. Logic alone suggests that such an approach will aid the effectiveness of promotional activities.

An external perspective also makes the case for collaboration. For many students, their parents, and other decision-makers a decision for studies in Canada is just that, a decision for Canada. A second consideration centers on the respective brand of an educational institution accessed. While destination-based recruiting certainly plays a role as well – such as in the case of California, London, or Queensland – this aspect typically reflects on a specific circumstance. It is rarely if ever driven by considerations for the constitutional or territorial organization of a host country.

### Governance Building Blocks

There are four basic considerations with regard to governance – governance model, membership, roles, and goal setting:

- Core governance model. It is recommended to balance a governing body with an expert committee structure (and a strong executive leadership position).

- Membership – Governing Body. Membership in governing bodies can follow a number of models, ranging from representative to expert-based. It is recommended to pursue a mixed model in order to ensure political buy-in across a wide spectrum of stakeholders. Therefore, the following stakeholders should be represented: Federal government, provincial governments (possibly in a regional format), select associations, select other stakeholder bodies, representatives of institutional providers (possibly on a rotating basis), external experts. For practical purposes, the governing body's membership should be capped at 30 members at the most, but of course accommodate both official languages.
- Membership – Expert Committees. Membership in expert committees should strictly reflect expertise and experience. Members should be recruited from the education community, as well as governmental agencies and other stakeholder associations. The committees' size is suggested to run at ten to twenty members at most. The expert committees should report to IEMA's Chief Executive, but be accountable to the Governing Body.
- Role – Governing Body. The governing body should be given wide latitude to devise processes, policies, and rules for the new agency within the framework of a federally funded crown corporation. This is to ensure that the governing body can be truly held accountable, that it can attract senior experts wishing to make a real difference, and to allow it to quickly modify the agency's development roadmap.
- Role – Expert Committees. Committees should be clearly delineated in their focus, and be given the freedom to pursue issues and topics a given committee considers of strategic importance (tactical direction and implementation will be the purview of staff members).
- Goal setting. The governing body should set organizational goals jointly with the main funding bodies. The latter would entail the Canadian Government, but could also include organizations which contribute other funding streams.

## 5.7 Resourcing

### Income Streams

Most successful national education marketing agencies have multiple income streams. At their core, respective federal governments underwrite operations and programming efforts. In the case of the DAAD, CampusFrance, and Nuffic, the European Union contributes substantial program funding. Others such as ENZ and AEI also take in levy funding (different levy models exist).

It is recommended to adopt a multi-source funding model. The Canadian Government should underwrite organizational and core programming expenses (such as the brand). Some program expenses are already accounted for (such as scholarships).

It is recommended to pursue a visa permit-based contribution model which would tie international student recruiting success directly to a contribution to the overall marketing effort for Canadian international education. A permit-based model should be staggered by sector or visa category since institutional income levels from international students differ widely. A fee could range from CAD 100 to CAD 500 (to be charged to the receiving institution, not the student).

Below table puts this suggestion into a comparative perspective. Please note that the table only lists fees charged to students. Fees being levied on education institutions vary widely between countries; are at times composed of many different fees which cannot be effectively compared; at times do not reflect other, related regulatory burdens; and are subject to intense debate in many countries such as the UK.

Determining competitor countries' detailed institutional student visa/study permit expense structure goes beyond the scope of this report. Should a study permit fee become part of a policy debate it is recommended to conduct a detailed assessment.

This funding source suggestion may experience push back from envisaged contributors. At the same time, it is strongly suggested that a funding model which fails to substantially connect marketing outcomes with marketing investments will yield inferior overall performance results owing to an inevitable disconnect between funding institutions and the beneficiaries of measures underwritten by such funding.

Visa Fee Comparison Table

| Country | Fees Charged to Student | Notes |
|---|---|---|
| Australia | • AUD 540 (includes AUD 115 International Education Contribution).<br>• AUD 70 for Permission to Work. | • No fee for some students under previously approved Commonwealth programs and secondary exchange students, and under AusAID program. |
| Canada | • CAD 125 | • Applies to applications from outside as well as from inside Canada. |
| France | • €60 for a course/stay of less than 3 months.<br>• €99 for a course/stay of more than 3 months. | • No charge for elementary and secondary school students on a school trip; students and post-graduate students on a studies-related journey or study program; French government scholars; recipients of foreign government or foundation grants and scholarships; and beneficiaries of the French-Canadian Youth Exchanges Agreement. |
| Germany | • No charge for a course/stay of less than three months.<br>• €60 for a course/stay of more than three months. | • Children under 6 years of age and all students from Schengen Treaty countries are not liable to pay visa fees. |
| New Zealand | • No charge for a course/stay of less than three months.<br>• Fees range from NZD 70 to 200 depending on the location of an applicant and mode of application. | • No charge for students from USA. |
| UK | • £145 for a Tier 4 (general) student application. | • Free of charge for Fulbright scholars; Chevening Scholars or Fellows; students in Commonwealth Scholarships and Fellowships Plan; British Marshall Scholarship recipients. |
| USA | • USD 35-200 SEVP fee (except for students from Canada, Bermuda, and the Bahamas).<br>• Visa processing fee: USD 131.<br>• Visa issuance fee: Based on reciprocity. | • Reciprocity can result in no additional visa issuance fees. |

Notes: Various visa waiver programs and exceptions apply, This table therefore should only be used as a general indicator.

Sources: Australian Government, Department of Immigration and Citizenship; Citizenship and Immigration Canada; French Ministry of Foreign and European Affairs; Federal Foreign Office of Germany; Immigration New Zealand; UK Home Office, Border Agency; U.S. Department of State and U.S. Immigration and Customs Enforcement.

A portion of the permit fees should be earmarked to fund needed operational and procedural improvements as well as ongoing service efforts at CIC and CBSA. This is relevant with regard to the expected increase in international students, and the impact of visa, border entry, and immigration policies and process on market perceptions.

It is not recommended to pursue a membership-based funding model. This model explicitly failed in the case of CECN. It also raises moral hazard issues such as members opting out while still benefiting from an agency's efforts and successful marketing campaigns, and is unlikely to yield sufficient funding.

### Overall Funding Level

The total amount of funding which an operational IEMA will require (by year 3 as sketched out in Chapter 5.10) is calculated at a minimum of CAD 22 million. Such a funding level would still place IEMA at a comparative disadvantage to, for example AEI or the British Council. Should a policy decision be made to allow IEMA to truly compete for global talent as well as to generate student intake numbers which suggest that Canada would regain previously lost regain market share, this budget requirement would easily double.

### Operational Expense Categories[45]

Staff expenses:

- The total, minimum staffing level for IEMA is estimated at 40-50 (see below comparison table).
- This figure includes headquarter staff, staff in offices abroad (whether employed or contracted), to-be-created education counsellors (which may or may not be on full-time contracts), existing science counsellors, and academic representatives (similar to the DAAD's IC model).
- The minimum staff headcount at the headquarter is estimated at 9-12 (included in the above range).

Total salary expenses are estimated at CAD 4.5 million.

Promotion expenses. Listed by category:

- Web-based promotions, training, and analytics. CAD 3.0 million.
- Traditional advertisement and promotions (ex. conferences and fairs). CAD 4 million.
- Conferences and fairs (direct and indirect (e.g., matching and incentive grants)). CAD 3 million.
- International office presence (wholly owned). CAD 3.5 million.
- Brand management (development, compliance, etc.). CAD 2 million.

Total promotion expenses are estimated at CAD 15.5 million.

[45] Basic operational expense levels for a fully deployed agency in year 3 (see Chapter 5.11).

- Training, intelligence acquisition, and incentive grant expenses:
  - Staff and sector training. CAD 0.3 million
  - Intelligence acquisition and analytics. CAD 0.7 million
  - Specific program grants. CAD 1.0 million

  Total expenses are estimated at CAD 2.0 million.

Total estimated expenses: CAD 22 million.

## Agency Comparison Table

| Organization | Type | Staff | Offices | Budget (CAD million) | International Students | Ratio IS/S |
|---|---|---|---|---|---|---|
| **CampusFrance** | Public Agency | 144 | 109 | 9.1 | 260,596 | 1,810 |
| **DAAD** | Public Agency | 649 | 65 | 467.4 | 233,606 | 360 |
| **British Council** | Public Agency | 5,570 | 182 | 1,016.1 | 341,795 | 61 |
| **Nuffic** | Public Agency | 240 | 12 | 177.7 | 76,000 | 317 |
| **ENZ** | Private Trust | 19 | 2 | 2.1(e) | 31,620 | 1,664 |
| **AEI** | Governmental Agency | 200 | 26 | 85.9 | 182,770 | 914 |
| **educationUSA** | Governmental Agency | n/a | 451 | n/a | 623,805 | 1,040 |
| **IDP** | Corporation & Stakeholder Association | 600 | 82 | n/a | 182,770 | 305 |
| ***IEMA** (proposed)* | *Public Agency* | *40-50* | *13* | *22.0* | *95,414* | *2,120* |

General notes: Data reflect most recent available data. Offices include headquarters and offices abroad. International students are only higher education students to allow for comparability. Ratio IS/S denotes the ratio of international students to staff member.

Staffing and office notes: CampusFrance staff data includes headquarter data (36) and an allocation of 108 Espace CampusFrance staff. DAAD staff data includes part-time and full-time (employee and contractor) staff but not lecturers. British Council data includes staff in the UK and aboard, but not teachers. ENZ staff data include 11 staff members at the headquarter and 8 NZTE staff members abroad. For calculation purposes, 45 staff members were assumed for IEMA.

Budget notes: Budget data for CampusFrance does not include expenses for the Espace CampusFrance. The budget data for ENZ is an estimate and assumed to be too low. Budget data for AEI reflects the line item “International Influence, Australian Education and Training”.

Sources: AEI, British Council, CampusFrance, DAAD, educationUSA, ENZ, ICG, IDP, Nuffic.

## 5.8 Staffing, Training, and Leadership

Staffing IEMA is likely to pose challenges on multiple levels. For one, only a limited number of expert international education marketers exists in Canada. This means that reaching the suggested staffing level might have to require recruiting experts from outside Canada.

Second, certain skills such as information technology-driven marketing, online community recruiting and branding development; competitive intelligence gathering, etc., are still rare in the entire international education industry. It might thus turn out to be necessary to search for such expertise outside the education sector.

A temporary solution to the above situation would be to initially outsource certain functions and programs in their entirety. At the same time, an extensive training effort should be undertaken to address staffing skill gaps at IEMA as well as stakeholder organizations and education providers. Such training should be multi-modal, possibly attached to certification schemes, and provided by experts.

The staffing of the executive leadership team provides a special challenge. Whoever might lead IEMA will have to command the respect of the Canadian international education community; will have to hold organizational, operational, and strategy development experience; and will have to be able to withstand (political) pressure from many sources.

## 5.9 Culture and Citizenship

Canadian international education, especially at the higher education level, has been much influenced by cultural diplomacy considerations. This is evident from sessions at CBIE's 2009 annual conference as much as from CBIE's "Canadian Institute" paper from August 2009.

Cultural diplomacy is an important aspect of positioning a country's education system internationally from a number of angles. Agencies such as the British Council, but also CampusFrance execute cultural diplomacy functions on behalf of their respective countries. The British Council for example has a much broader and deeper mandate than simply promoting British education.

Yet it would be a serious mistake to elevate cultural diplomacy into a position of leading rationale for a yet-to-be created international education marketing agency. For one, there are inherent organizational, staff skill, and mission conflicts between focusing on cultural diplomacy and marketing education.

Second, affording cultural diplomacy a prime role would require a completely different organization than the one sketched out above. The latter is fundamentally organized around performance and capability considerations, while cultural diplomacy models are not.

Third, a cultural diplomacy-driven model would implicitly look backwards to a time in international education which simply is not coming back. The competition for talented students is real and increasingly fierce. Such competition needs to be addressed in a proper, focused manner.

## 5.10 Quality Assurance

Quality assurance (QA) remains one of the most ill-understood competitive levers in international education marketing. QA is ultimately a competitive tool and not a context-less and uncritically accepted statement of fact from a customer perspective.

By now many countries have joined the QA marketing promotion circuit by creating organizations and systems, testing and certification protocols, and QA brands which all (a) proclaim to be "world class", and which (b) are used to market a country, education system, or institution. From a consumer standpoint, many of these initiatives will eventually cancel each other out.

In this context, Canadian education providers must come to terms with the fact that simply proclaiming to offer high quality education underwritten by a Canadian QA scheme is no longer a sufficient competitive tool but a base condition.

An expert in deploying QA as an advanced competitive tool is the Australian Government. By relentlessly espousing the supposed superiority of Australian QA, the Australian Government has managed to create a widely accepted market perception.

Even more advanced, the Australian Government is proposing to other countries to adopt its QA scheme, in effect creating a meta QA marketing tool. This is the competitive landscape Canadian education providers will need to engage with.

IEMA must take an intellectual leadership role in working with Canadian international education stakeholders on evaluating precisely what the competitive position of Canadian education is from a market perspective; how various QA schemes can augment their competitive position; what further adaptation and development steps might be necessary; and how the emerging wave of contextual, community, and competition-driven QA marketing models is developing.

## 5.11 Implementation

IEMA will most likely have to be created and rolled-out in a four-step approach:

Step 1: A transition phase to repair, rationalize, and re-orient the current landscape. There are compelling reasons to limit this transition period to one year, a longer transition period might be required. It is expressly pointed out that an extended transition period carries the potential for much of the current change momentum to be lost.

Step 2: A start-up phase which will focus on creating the legal foundation, setting up organizational structures, hiring expert staff, inaugurating programs, and repeated alignments with market and stakeholder needs. This start-up phase will require anywhere from one to two years.

Step 3: A ramp-up phase during which IEMA will professionalize its operations, possibly roll-in previously outsourced functions, and take on new service and delivery models. This ramp-up phase will lead IEMA toward the end of an initial five-year cycle.

Step 4: An assessment, revision, and re-purposing step following the completion of the initial budget cycle. Given the rapidly changing international education landscape it is recommended to build in a true re-assessment

Mapping out a long-term development roadmap for IEMA will be a critical step in assessing progress, both for the sake of the development trajectory of IEMA as well as with a view on competitors and their respective development trajectories.

# 6. DEVELOPMENT RECOMMENDATIONS

## Introduction

The previous chapter focused on structural analysis and recommendations with regards to components of an international education marketing landscape. This final chapter focuses on three specific development recommendations which are in many ways independent of structural changes and adjustments.

These three recommendations were selected because all three can be implemented without requiring any complicated structural changes, they are relatively affordable, and they offer tangible benefits in a relatively short time frame.

The first recommendation discusses the need for expert marketing and analysis training in order to allow Canadian institutions to compete with marketing leaders such as Australia and the UK.

The second recommendation focuses on the emerging shift toward online marketing and recruiting models, an area in which to date, many Canadian institutions have failed to engage strategically or at all.

The third recommendation proposes a comprehensive and integrated scholarship strategy which aims to raise the effectiveness of recruiting talented students into Canada by notably improving the communication of scholarship opportunities for studying in Canada.

## 6.1 The Need for Marketing and Market Analysis Training

### Qualifiers

Expert-level marketing and advanced market analysis are institutional as well as system-wide performance areas in which the Canadian international education landscape has struggled to keep up with leaders such as Australia and the UK. These struggles ultimately gave rise to the commissioning of this report itself.

The following discussion of these skills by definition can only touch on a few structural elements rather than individual skill topics themselves. The point thus is not to focus on a discussion of basic promotional skills such as creating a website or deciding on the logo for a conference booth.

Rather, the focus is on advanced, high value marketing activities and market analysis. Examples for such activities and analysis include:

- The deep statistical analysis of Canadian as well as competitor trends.
- The deployment and integrated usage of CRM systems.
- The usage of game theory to predict competitor behaviour.
- Training in the development of rigorous, evidence-based marketing plans.

### The Need for Quality Training

The level of international education marketing “noise” has risen substantially as evidenced by the proliferation of conferences (such as the relatively recent entrants APAIE and QS-APPLE), the rise in conference attendees (the 2009 ENZ and EAIE conferences experienced record turn outs), the hiring of marketing staff in institutions, the number of web pages and portals dealing with international education, and the proliferation of marketing service providers. Noise, however, does not equal quality.

Within many Canadian education institutions, expertise about international marketing practices, the advanced analysis of competitive trends, and the setting of institutional strategy and policies remains underdeveloped and in some instances effectively absent. This view was shared by the vast majority of interviewees contacted during the course of research for this report.

The modest performance of many education sectors in Canada with regards to attracting international students in recent years, despite the presence of a

high quality product, furthers the case for improving institutional as well as system-wide marketing and analysis capabilities.

## International Education Marketing Training in Global Perspective

There is no shortage of training opportunities in international education marketing:

- International education associations such as the EAIE offer training through their interest groups, both at conferences as well as in courses and workshops throughout the year. The EAIE also publishes training materials such as the *Marketing your institution internationally* compendium.
- Governments have begun to be more involved by more or less directly sponsoring marketing training efforts. For example, GATE Germany (which is associated with the DAAD) offers low cost training sessions.
- Large private education support services providers, ranging from Hobsons to IDP, offer a range of marketing support services, including research and training. IDP co-hosts the annual Australian International Education Conference (AIEC) which encompasses a substantial amount of workshops and sessions dealing with marketing topics.
- Increasingly, commercial marketing service providers are discovering international education as a new market for their products and services. While some are technically high in proficiency, many so far lack a contextual understanding of international education.
- Smaller, often specialized providers, tend to cover every conceivable education marketing topic at every quality level. Most are focused on local or regional delivery, and less than a dozen are known internationally.

While training is being offered in substantial ways, is must also be understood that much of the currently offered training is only of moderate quality:

- With a few exceptions, many membership-driven associations which offer volunteer-based sessions and training often lag best practices by a decade.
- Governmental sponsoring efforts at times either try to politically micro-manage marketing efforts or result in little more than heavily subsidized, lowest common denominator training.
- Large education support providers have built proficient organizations and often good quality entry level training modules, but rarely address more advanced or strategic needs.

The number of organizations and individuals who deliver high quality international education marketing training, coupled with a grasp of analytical and strategic issues, so far remains small and is estimated at less than two dozen worldwide. Most of these organizations and experts can be found in Australia, the Netherlands, the UK, and the US.

## The State of International Education Recruiting and Marketing in Canada

A commonly acknowledged aspect of the Canadian international education landscape is that it has not focused on the development of marketing and recruiting as a core competition enabler overall, and certainly not when contrasted with countries such as Australia. A case in point is CECN. The shutdown of CECN on 30 June 2009 was, at least on some level, based on the lack of institutional support for its marketing and recruiting-oriented role.

With the future of CECN remaining unclear, the two major entities contributing to the advancement of international education are CBIE and DFAIT. Yet both have not developed a deep footprint in international marketing and recruiting matters. Two examples illustrate this situation.

First, the 2009 Australian International Education Conference (AIEC) is to be held in mid-October. It features 74 sessions (excluding workshops, roundtables, and alike) of which seven are dedicated to student recruiting topics and another eleven substantially discuss recruiting matters[46]. Many others will invariably touch on recruitment issues.

By contrast, the CBIE 2009 Conference, which will take place in early November, is hosting 44 sessions. Out of these 44 sessions, just four deal primarily with recruiting issues, and two more discuss some recruitment issues[47]. While this comparison is admittedly somewhat superficial, it nonetheless points to substantial differences in organizational priorities, attendees' thematic interests, and cultural preferences.

The second example is the current DFAIT budget allocation for international education promotion efforts: CAD 2 million over a two year time frame. This amount is lower than the individual promotion budgets of some of Australia's internationally more active universities.

[46] Student recruitment in the Australian context is inherently a marketing topic. It is also more readily identifiable ahead of a conference than marketing as such.

[47] Information and session counts are based on respective conference programs as published in late September 2009.

Various associations in Canada have proposed budgets of CAD 15-20 million annually. This report is advocating for at least CAD 22 million annually. It is hoped that the next budget cycle will see a significant raise in funding for international education promotion.

## Specific Recommendations and Expected Benefits

Specific recommendations:

- As a first step, it is recommended to conduct a skills audit across Canada with regards to existing advanced marketing and market analysis expertise. This audit should be conducted across all relevant education sectors, associations and stakeholder groups, governmental and/or public agencies, and the private sector.
- In a second step, the skill sets required for high quality international education promotion work should be sketched out, categorized, and matched against existing skills. As a result, a gap analysis will emerge.
- In a third step, a training and skills development roadmap should be drawn up which, over a five year time period, lays out a comprehensive schedule to address the current deficiencies with a view on minimizing the gap to current leaders.

Expected benefits:

- A notable improvement of marketing performance across all sectors within two to three years time.
- in a time of to be expected added investments into marketing efforts, resources will be spend on best practice initiatives rather than trial and error programming.
- A year after year rise in the effectiveness of institutional student recruiting performances, as well as the overall international positioning of institutions.

## 6.2 The Shift to Online Marketing and Recruiting Models

### Qualifiers

It is highly likely that some significant technological advance or new community platform will have emerged between the time of closing research for this report and its eventual release. This high rate of innovation pressure has made crafting lasting online marketing strategies rather difficult.

For example, only a few years ago, blast e-mail was considered a leading marketing technique. Today, it is barely mentioned anymore. Therefore, the following comments and recommendations focus on structural rather than specific aspects of online marketing models.

As second qualifier centers on the breadth of online communities, platforms, and tools vis-à-vis the entire range of marketing approaches which are possible. These include outreach, basic brand awareness creation, alumni networking, customer (student) information acquisition, rather traditional advertisement approaches, and so on.

The focus of this section is solely placed on the emerging role of online communities, platforms, and tools on recruiting operations by virtue of offering access to, at times, a vast number of potential students (i.e. by acting as talent pools).

### The Emergence of Online Communities as Talent Pools

Over the last couple of years, it has been difficult to avoid the hype surrounding online communities such as initially MySpace and then Facebook, and now LinkedIn. One reason for this elevated attention has been the ramp up in user numbers. By 2009, the global user base of online communities has exceeded one billion. Moreover, far from being a North American phenomenon any longer, online communities have become a global networking and communication tool.

Two communities have emerged as especially relevant for higher education. One is Facebook which by the fall of 2009 had surpassed 250 million registered users. The majority of Facebook users are still in the teen and twen years – the target demographic for most all education sectors.

The nature of Facebook's approach to personal profiles and the logic of group organization – which originated in a campus culture – has made Facebook a

premier platform for outreach, networking, and ultimately recruiting efforts for education providers.

LinkedIn, a professional networking platform, reached a registered user base of 45 million in August 2009. LinkedIn's focus is on enabling users to portray themselves from a professional vantage point and to network and connect with fellow users.

Users can indicate their network platform needs based on a set menu which allows for narrow casting messages (such as "career opportunities" or "getting back in touch"). LinkedIn offers specific user base search capabilities on a commercial basis, a feature which is already widely used by companies' human resources departments.

Given the relative youth of these platforms, ever changing features, and the rapid advances in the underlying technologies many educational institutions have struggled with approaching online communities in a strategic fashion. This has begun to change, however. It was recently reported that INSEAD, a leading business school, already recruits about 40% of its executive training participants on LinkedIn. Online communities as viable talent pools have arrived.

## From Top-down Channel Control to Bottom-up Triangulation Models

While much discussed, recruiting in online communities has not seen a lot of sustained success yet. This is driven by four factors:

- Most importantly, the short history of online communities has not been conducive to the development of recruiting practices (which are being developed at this time). As a result, there is very little well researched and commonly agreed-on practice amongst recruiters and marketers.
- A good number of past attempts ported traditional marketing and recruiting practices onto online communities and failed because of the lack of fit, relevance, or tonality. A key contributor to these failures has been a narrow, top-down approach which often found itself at fundamental odds with the bottom-up, self-organized culture of many online communities.
- Many platforms are not set up to allow education institutions (or businesses) to recruit based on well identified and/or reliable biographic information (LinkedIn and MySpace differ in this regard).
- Many platforms have not been helpful to recruiting efforts, either because of technical limitations, disinterest in a possible recruiting support function, or because of not yet established economic models which allow for such a function.

Amongst emerging best practices in this area are approaches which are built around the logic and culture of online communities and platforms. From a recruiting standpoint this means a transition away from a controlled, specific, and directed message to a recipient, to a network-centric approach.

The latter involves, for example, a triangulation approach which employs members of a network to spread a message to fellow network members. Another example is to develop linkages – both in a technical as well as in a relationship sense – to a talent pool which entices members of such a pool to access an organization's domain.

One example illustrating the above has been the failure of universities to make recruiting headway on MySpace by copying over admissions information into an institutional profile and in an attempt to "friend" MySpace users. Success has been elusive since content and approach were mirroring a traditional institutional approach, and in most all circumstances nothing compelling was offered to MySpace users.

More promising are approaches which work with community members such as alumni or faculty members who are a natural, embedded part of a given community or group (i.e. a triangulation approach). Rather than supplying content, third party content is now being carefully adopted. In addition, intelligence gathering is picking up pace based on more and more analytical tools to evaluate content, interactions, and preferences in a respective talent pool.

## The State of Online Community Recruiting in Canada

Many Canadian education institutions have not created a deep online community footprint, and most have taken only tentative steps to fully engage in relevant communities and platforms. This applies not only to a given institution, but also to students, alumni, and staff of an institution.

A brief and simple numerical example highlights this relatively weak footprint of Canadian education institutions in online communities. The following comparison contrasts two research intensive, large universities: The University of Toronto with a total enrolment of 73,685 students (2008/09), and the University of California at Los Angeles with a total enrolment of 39,650 students (fall 2008).

Institutional presences in major online communities:

- UCLA's MySpace group has just over 12,000 members while Toronto's group has less than 1,000 (both are public groups).
- On LinkedIn, the University of Toronto group has about 5,000 members while the (official) UCLA group is home to nearly 7,000 members.
- On Facebook, Toronto's largest group has nearly 4,900 fans while UCLA's largest group is home to more than 24,800 fans[48].

The larger point is that many Canadian education institutions have not yet even strategically engaged with what has already become the largest set of pools of potential students by far. In many instances, institutional brand footprints are underdeveloped to the point of diminished relevance for their own members who are largely recruited from current students and alumni as well as some staff members. Crucially, they also lack visibility and compelling content for potential students.

## Specific Recommendations and Expected Benefits

Specific recommendations:

- There is no need for any centralized or officially supported program. Engaging in online communities and building institutional online brands is an exercise best left to an institution. Attempts at building nation-wide online community networks or to centrally brand entire countries in communities in top-down fashion have failed in the past and hold little promise for the future.
- Instead, it is recommended to commence a series of training and up-skilling initiatives which expose Canadian institutions to emerging best practices, which explain organizational requirements, and highlight strategic opportunities and implications.
- Such training should be conducted by trainers who bridge technical and organizational knowledge with an understanding of the specific nature of education.
- Recruiting and branding in online communities should involve, at a minimum, the following units: Recruiting, marketing and communication, admissions, alumni, legal, IT, and select faculty members.

[48] Data are from September 2009. Sources: Facebook, LinkedIn, MySpace.

Expected benefits:

- Foremost, Canadian education institutions would gain critical visibility in online communities.
- A secondary benefit would be a better contextual understanding of the needs and preferences of target audiences.
- The third and most salient benefit would be the ability – over time – to begin tapping into relevant talent pools and thereby improving reach and/or depth and/or yields.

## 6.3 A Comprehensive and Integrated Scholarship Strategy

### Qualifiers

The recommendation to create a comprehensive and integrated scholarship strategy is prefaced by three qualifiers. First, it does not comment on tuition, tuition waivers, loan arrangements, or general funding issues. It is solely focusing on a single aspect of talent acquisition, scholarships. Scholarships for this purpose are defined as a merit or special criteria-based student funding mechanism, with the latter including factors such as socio-economic background, nationality, or ethnicity.

Second, a scholarship strategy by definition is foremost focused on highly achieving students. The strategic rationale for such a strategy is two-fold. On the one hand, scholarships enable deserving students who otherwise might not be able to afford their chosen course of study (or it raises the relative attractiveness of such a course of study). On the other hand scholarships serve as a competitive lever to attract students who might decide to enrol in another education system.

### Current Major Scholarships Available

- Canada USA Fulbright: CAD 660,000 matched by USA (not CBIE administered).
- Canada China Scholars Exchange Program: CAD 300,000 matched by the People's Republic of China
- Emerging Leaders in Americas: CAD 3,000,000 (2009/10), CAD 5,000,000 (2010/11).
- Canada CARICOM Leadership Awards: CAD 1,400,000.
- Commonwealth (including UK/NZ Post-Doctoral Research Fellowships but not CARICOM): CAD 1,500,000.
- Government of Canada (including Post-Doctoral, Brazil and Mexico): CAD 1,700,000.
- Canada Chile Leadership Awards: CAD 250,000.
- Canada Chile Equal Opportunities Scholarships: Chilean funding (approximately CAD 1,750,000) with DFAIT administration costs contribution.
- Foreign Government Awards: Foreign government funding with DFAIT administration costs contribution.

Total DFAIT International Scholarships Budget: Approximately 10,500,000 including administration.

## The Need for Scholarship Marketing as a Competitive Lever

By now, most but all national governments have committed themselves to a human capital development and/or talent acquisition strategy. Some governments have committed a significant amount of scholarships to this end for decades; Germany or the UK are obvious examples.

Others have only recently joined this competitive landscape – some with highly competitive and generous offers such, for example, as in the case of KAUST in Saudi-Arabia. Thus, the scholarship supply landscape has become broader and more competitive at the same time.

From a demand perspective, truly talented students, while a worn-out truism, are indeed at a premium. This translates into the fact that students who can compete for admissions to a Top 100 research university in the world often have more than one choice of university to enrol in, and are also often able to marshal funding from one or more sources. The academically most talented students, especially at a graduate level and in STEM subjects, in many instances can select from competing scholarship packages.

Given this highly competitive, dual landscape, it is critical for Canada to develop a comprehensive, clearly articulated, and properly advertised scholarship strategy in order to compete with other nations which are either significantly larger (the US), have committed substantial resources to human capital development (Gulf Region), can draw on multi-national funding pools (European Union countries), or which aggressively market their education system (Australia).

## Information Fragmentation and Access to Scholarships

Scholarships are the most effective, yet often least integrated marketing tool in many countries which competitively recruit international students. One reason is that the sources and kinds of scholarships tend to be highly fragmented: Sources include, amongst others, governmental agencies, academic institutions, foundations, business, non-profit organizations, and individual sponsors. Scholarship types range from a full, multi-year doctoral studies fellowship worth more than CAD 100,000 to a one-week summer program grant worth a couple of hundred dollars.

While fragmentation is the norm, information about scholarships typically is freely and publicly available. In addition to institutions advertising their own scholarships, over the last decade countless websites and other Internet aggregation portals have been created which encompass information about

and/or refer to scholarships. It therefore should be entirely possible to capture the vast majority of domestic scholarship information as well as key international scholarships for studies in Canada with relative (technical) ease.

## The State of Scholarship Marketing in Canada

The current state of scholarship advertising to international students in Canada is very much improvable on all mentioned accounts. Amongst the many websites and portals a potential student might access, there are three popular portals which are run by major Canadian stakeholders in the scholarship area[49].

One key information portal is *DestinEducation* which is hosted by CBIE (www.destineducation.ca). Aside from a technical implementation which appears to go back multiple Internet technology generations, the site also lacks interactive features and at times only offers information which is significantly outdated.

For example, tuition information provided is for 2005-06 and 2006-07, respectively. A brochure on awards for international students to study in Canada dates to March 2004. The portals communication style takes an unnecessarily belittling and simplistic tone, and while English and French versions are offered, a translation into other languages is absent.

The second important information portal is DFAIT's *International Scholarships* portal (www.scholarships.gc.ca). The portal's design is straightforward, and it does offer a pull-down menu which allows information seekers to search for scholarships by their respective nationality.

The limitations of a government-run information website, however, are apparent. The amount of overall information is limited, and presented in a very formalized, text-centric manner. This portal is only available in English and French. It is also subject to a number of dead links, incidentally within the *International Scholarships* portal itself.

A third scholarship portal is CECN's *Study Canad*a portal (www.studycanada.ca). While visually and in terms of lay-out of good quality, it also offers outdated information (tuition fees are provided for 2006-07). Scholarship information is grouped by education sector – and only lists scholarships offered by CECN membership institutions.

[49] As per a web-based search for "Canada international student scholarship".

A link to a website with ten other scholarship sources exists but appears to be haphazard in its composition. Given the unclear role of CECN within the Canadian international education marketing landscape, the question of the future role of the *Study Canada* portal remains unanswerable at this time.

## Specific Recommendations and Expected Benefits

Specific recommendations:

- A scholarship portal project should be started as soon as possible. It would focus on three sequential tasks:
  - In a first step, all relevant scholarship information across Canada and key recruiting countries will have to be collected. The retrieved information will have to be categorized, computed for their value, and tagged for key criteria such as eligibility, duration, value, and so on.
  - In a second step, a gap analysis of available scholarships relative to competitor country scholarship offerings, as well as with regards to Canada's recruiting priorities, will have to be undertaken.
  - In a third step, the results of the first and second steps will have to be infused into the policy-making and marketing landscape. This should be undertaken with a view on a multi-channel roll-out and sustained, long-term maintenance of the gathered information. At the same time, it may be necessary to augment funding in the scholarship landscape in order to allow Canada to become more competitive.

Expected benefits:

- An improvement of Canada's brand and competitive position as a desirable study and research destination amongst potential international students.
- An improved level of intelligence about competition dynamics and specific responses to initiatives.
- An improved intake and yield of top talent students over time.

# 7. SOURCES

## 7.1 Country Information Sources

### Australia

- AustraLearn
- Australian Education International (AEI)
- Australian embassies and missions
- Australian Government, Department of Immigration and Citizenship
- Australian Trade Commission (Austrade)
- Center for International Studies (CIS)
- Department of Education, Science and Training (DEST)
- Department of Education, Employment and Workplace Relations (DEEWR)
- Education Board Network
- IAE Study in Australia Pty Ltd.
- IDP Education Australia
- IES Abroad
- State governments and departments
- Study in Australia
- Study Queensland
- Universities Australia / Australian Vice-Chancellors' Committee

### Canada

- Advisory Board on English Education, Quebec (ABEE)
- Advisory Committee on International Student Immigration (ACISI)
- Association of Administrators of English Schools of Quebec (AAESQ)
- Association des cadres scolaires du Québec (ACSQ)
- Agence universitaire de la Francophonie (AUF)
- Alberta Advanced Education and Technology, Study in Alberta
- Alberta Association of Colleges and Technical Institutes (AACTI)
- Alberta Centre for International Education (ACIE)
- Alberta College and Technical Institute Student Executive Council (ACTISEC)
- Alberta Learning Information Service (ALIS)
- Alberta School Boards Association (ASBA)
- Alberta Teachers' Association (ATA)
- Association of Universities and Colleges Canada (AUCC)

- Association of Canadian Community Colleges (ACCC)
- Association of Registrars of Universities and Colleges (ARUCC)
- British Columbia Council for International Education (BCCIE), Study in BC
- British Columbia Ministry of Advanced Education, Learn Live BC
- British Columbia School Trustees Association (BCSTA)
- Canada Language Council (CLC)
- Canadian Association of Career Educators and Employers (CACEE)
- Canadian Association for Graduate Studies (CAGS)
- Canadian Association of Independent Schools (CAIS)
- Canadian Association of Private Language Schools (CAPLS)
- Canadian Association for Public Schools - International (CAPS-I)
- Canadian Bureau for International Education (CBIE)
- Canadian Council for the Advancement of Education (CCAE)
- Canadian Council on Learning (CCL)
- Canadian Education Association (CEA)
- Canadian Education Centre Network (CECN)
- Canadian Federation of Students (CFS)
- Canadian Heritage
- Canadian Information Centre for International Credentials (CICIC)
- Canadian International Development Agency (CIDA)
- Canadian National Education Exchange Centre (CNEEC)
- Canadian School Boards Association (CSBA)
- Canadian Society for Training and Development (CTSD)
- Career Development Association of Alberta (CDAA)
- Citizenship and Immigration Canada (CIC)
- Centre for International Studies and Cooperation (CECI)
- Conférence des recteurs et principaux des universités du Québec (CREPUQ)
- Council of Ministers of Education, Canada (CMEC)
- Council of Second Language Programs (CSLP)
- Department of Foreign Affairs and International Trade (DFAIT)
- EduNova Cooperative Ltd.
- Fédération des comités de parents du Québec (FCPQ)
- Federal-Provincial Consultative Committee on Education Related International Activities (FPCCERIA)
- Office Franco-Québécois pour la jeunesse (OFQJ)
- International Council for Canadian Studies (ICCS)
- International Educators Association of Canada (IEAC)
- International Public School Education Association, British Columbia (IPSEA)
- Languages Canada
- Leading English Education and Resource Network, Quebec (LEARN)

- Learning Disabilities Association of Canada (LDAC)
- Manitoba Advanced Education and Literacy (AEL)
- Manitoba Association of School Trustees (MAST)
- Manitoba Council for International Education (MCIE)
- Manitoba International Education Branch (IEB)
- National Association of Career Colleges (NACC)
- National Education Marketing Roundtable (NEMR)
- Network of Francophone Colleges Canada (RCCFC)
- New Brunswick Post-Secondary Education, Training and Labour
- Newfoundland and Labrador Department of Education
- Newfoundland and Labrador School Boards Association (NLSBA)
- Northwest Territories Department of Education, Culture and Employment
- Nova Scotia Department of Education and Culture
- Nova Scotia School Boards Association (NSSBA)
- Nunavut Department of Education
- Ontario Ministry of Education, Study in Ontario
- Ontario Principals' Council (OPC) / Education Leadership Canada
- Ontario Public School Boards' Association (OPSBA)
- Ontario School Counsellors' Association (OSCA)
- Private English Language Schools Association of Canada (PELSA)
- Quebec English School Boards Association (QESBA)
- Quebec Ministry of Education, Leisure and Sport (MELS)
- Saskatchewan School Boards Association (SSBA)
- Saskatchewan Ministry of Advanced Education and Employment
- Société de gestion du réseau informatique des commissions scolaires (GRICS)
- Statistics Canada
- World University Service of Canada (WUSC)
- Yukon Ministry of Education

### France

- Agence CampusFrance
- Égide
- French Agency for International Expertise and Mobility (AFEMI)
- Ministry of European and Foreign Affairs (MAÉE)
- Ministry of Higher Education and Research (MESR)
- Ministry of National Education (MÉN)
- Ministry of Immigration, Integration, National Identity and Solidarity Development (MIINDS)

- National Centre for School and University Welfare (CNOUS)

## Germany

- Alexander von Humboldt Foundation
- Baden Württemberg and Bavaria web portals
- Educational Exchange Service (PAD)
- Fraunhofer Gesellschaft
- German Academic Exchange Service (DAAD)
- German Federal Foreign Office
- German Federal Ministry of Education and Research (BMBF)
- German Research Foundation (DFG)
- Goethe Institut
- Helmholtz Association
- International Youth Service of the Federal Republic of Germany (IJAB)
- InWent (Capacity Building International, Germany)
- Max Planck Society (MPG)
- North America Liaison Offices of German Universities
- Regional offices of German foundations
- Study in Germany

## New Zealand

- Auckland University of Technology
- Education New Zealand (ENZ)
- Immigration New Zealand
- Lincoln University
- Massey University
- Ministry of Education
- New Zealand Vice-Chancellors' Committee (NZVCC)
- New Zealand Educated
- University of Auckland
- University of Canterbury
- University of Otago
- University of Waikato
- Victoria University of Wellington

### Netherlands

- Nuffic

### United Kingdom

- Department for Business, Enterprise, and Regulatory Reform (BERR)
- Department for Business, Innovation and Skills (BIS)
- Department for Innovation, Universities, and Skills (DIUS)
- British Council
- Education UK
- How-Do
- London International Study Centre
- StudyCentral
- Universities and Colleges Admissions Service (UCAS)
- UK Council for International Student Affairs (UKCOSA/UKCISA)
- UK Higher Education International Unit (IU)
- UK Home Office, Border Agency
- Universities UK (UUK)

### United States

- American Association of Collegiate Registrars and Admissions Officers (AACRAO)
- American Council on Education (ACE)
- American International Education Foundation (AIEF)
- American International Recruitment Council (AIRC)
- Amerika Haus
- Asia Foundation
- Boston College Center for International Higher Education (CIHE)
- Council on International Education Exchange (CIIE)
- Department of Education, International Affairs Office (IAO)
- Department of State, Bureau of Educational and Cultural Affairs (ECA)
- educationUSA
- Fulbright Program
- Hobsons
- Institute of International Education (IIE)
- NAFSA: Association of International Educators

- Study in the USA
- University of California at Berkeley, Center for Studies in Higher Education (CSHE)
- U.S. Department of State
- U.S. Immigration and Customs Enforcement

## 7.2 International and Transnational Information and Data Sources

### Academic Sources

- Academic Cooperation Association (ACA)
- European Association for International Education (EAIE)
- European University Association (EUA)
- *Journal of Studies in International Education* (JSIE)
- Marginson, Simon. Various publications
- Observatory on borderless education
- Organisation for Economic Co-operation and Development (OECD)
- United Nations Educational, Scientific and Cultural Organization (UNESCO)

### Other Sources

- McKinsey & Company
- The Economist

# 8. APPENDIX – CANADIAN ENTITIES

## Overview of Other Canadian Entities Which Contribute to Canada's International Education Landscape (listed alphabetically)

Advisory Committee on International Student Immigration (ACISI)

Citizenship and Immigration Canada (CIC) created the Advisory Committee on International Student Immigration (ACISI) in 1995, to bring together international education stakeholders. This committee meets twice annually, to receive updates from and provide advice to CIC officials on issues involving international students in Canada and related immigration concerns.

It works closely with other government departments to develop consistent initiatives, including the support of marketing programs that DFAIT launches. The committee comprises representatives from 15 government departments and 17 non-governmental organizations.

Website: www.cic.gc.ca/english/study/institutions/partnerships.asp

Agence universitaire de la Francophonie (AUF)

The Agence universitaire de la Francophonie (AUF) is a global network of higher education institutions that teach in French. It has 434 agents in 65 locations, linked to nine offices. It offers programs to support research and instruction in French, and distributes more than 2,000 scholarships each year to aid student mobility.

Its budget of EUR 40.0 million (CAD 61.5 million) comes mainly from the French government, but also on a smaller scale from Canada (Quebec), Wallonia-Brussels, Switzerland and Cameroon. Its network contains 677 schools spread across 81 countries, with the countries of highest concentration being France, Vietnam, Algeria and Canada.

Website: www.auf.org

Alberta Advanced Education and Technology, Study in Alberta

The Ministry's portfolio encompasses apprenticeship and industry training, adult learning, and technology. Among its responsibilities are: Funding

education providers, providing student financial assistance, approving programs of study, certifying education providers, providing direction for science and research in Alberta, managing investments in science and research, and facilitating technology commercialization. It works with post-secondary institutions to foster greater access to and quality of higher education in Alberta.

In 2005, the Ministry launched an *International Education Action Plan for the Future*, which lays out the objectives of enhancing Albertans' access to international and intercultural opportunities, positioning Alberta as an international study destination of choice, increasing Alberta's international competitiveness in supplying educational products and services, and strengthening the collaboration among provincial players involved in international education.

The Ministry also runs *Study in Alberta*, a promotional website that outlines comprehensive information and resources for students for school levels ranging from primary through post-secondary.

Websites: www.advancededucation.gov.ab.ca, www.studyinalberta.ca

British Columbia Council for International Education (BCCIE), Study in BC

The British Columbia Council for International Education (BCCIE) is a non-profit society established to promote international education in British Columbia (BC). Membership is open to public and private schools, K-12, and post-secondary institutions, but most of BCCIE's members are BC universities and colleges.

BCCIE operates a web portal for students who wish to study both in BC and abroad, and holds professional development events annually for international educators. BCCIE is cooperating with Canadian missions, BC trade offices and other overseas partners to organize a series of *Team BC* missions in 2009-10, operating in conjunction with overseas fairs.

One of its marketing promotion platforms is StudyinBC.com, a website geared toward students that provides them with information about studying and living in Canada.

Website: www.bccie.bc.ca, www.studyinbc.com

British Columbia Ministry of Advanced Education, Learn Live BC

Learn and Live in British Columbia is the marketing and promotion website of the Ministry of Advanced Education, British Columbia. Apart from advertising BC's public post-secondary institutions and BC in general as an international study destination, it provides comprehensive resources for students on institutions and programs in BC, living in BC, working in BC while studying, how to apply to a BC institution, and how to get a visa to study in Canada. It also links to the international offices at BC's public post-secondary institutions.

Website: www.learnlivebc.ca

Canadian Association for Public Schools - International (CAPS-I)

The Canadian Association for Public Schools - International (CAPS-I) is a non-profit society. Its 56 members consist of publicly-funded school districts or boards which offer established international student programs. These programs range in grade level from elementary to high school. The association advocates for public school international education and provides sector networking, professional development and marketing opportunities for its members.

It is mandated to act as a forum for sharing information and collaborating in public sector international education, support K-12 international student programs, engender a united Canadian approach to international education practices, coordinate joint marketing initiatives, and collaborate with provincial and federal governments and international educational groups within and outside of Canada.

Its website provides information assisting potential international students with finding a school in Canada, and also gives some instructions on the application process.

Website: www.caps-i.ca

Canadian Council for the Advancement of Education (CCAE)

The Canadian Council for the Advancement of Education (CCAE) is an association for educational advancement professionals working at universities, colleges and independent schools across Canada. CCAE is a source of information, connection and support for its members.

Its website provides a career centre with job posting services, an award program to recognize outstanding achievements in institutional advancement, and an events calendar of professional development opportunities.

It also provides branding guidelines to assist event organizers with planning CCAE-branded communications and marketing. CCAE is a volunteer-led organization and has close to 1,400 voting members, representing more than 140 educational institutions.

Website: www.ccaecanada.org

Canadian Information Centre for International Credentials (CICIC)

The Canadian Information Centre for International Credentials (CICIC) serves as an information clearing house of data regarding the recognition and portability of Canadian and international educational and occupational qualifications. It is a unit of the Council of Ministers of Education, Canada (CMEC).

CICIC collects information about procedures for recognizing academic and occupational credentials in different Canadian jurisdictions and stores it in a database. In partnership with Canada's provinces and territories, it provides information about post-secondary information systems in Canada to various users, and also submits this information to the World Higher Education Database (WHED).

CICIC also advises individuals on what they need to do to have their credentials assessed and recognized in Canada. CICIC itself does not grant recognition of or assess credentials; ultimately, only the college, university or licensing body to which the individual applies may recognize foreign qualifications.

Also, although CICIC does not itself make policy, it does advocate for measures to increase the uniformity of assessment practices and greater awareness of the need to reduce barriers to students and professionals moving to or through Canada. It also publishes research reports, brochures, news bulletins and fact sheets about educational and occupational mobility.

Website: www.cicic.ca

## Canadian International Development Agency (CIDA)

The Canadian International Development Agency (CIDA) is a development assistance agency whose mandate is to support the sustainable reduction of poverty and promotion of human rights in developing countries. It was established in 1968 to administer the majority of Canada's Official Development Assistance (ODA) program.

It focuses on democratic governance, private sector development, health and basic education, gender equality, and environmental sustainability. In addition to the developing countries themselves, CIDA collaborates with other federal departments, many Canadian organizations, international organizations, and donor countries.

In 2005-6, Canada's international aid envelope was CAD 3.7 billion, of which 78% was managed by CIDA. In the education sector, CIDA focuses on enrolling children in school and procuring textbooks.

Website: www.acdi-cida.gc.ca

## Canadian National Education Exchange Centre (CNEEC)

The Canadian National Education Exchange Centre (CNEEC) is an institute for research, design, implementation and management of educational projects, aimed at supporting the export of Canadian higher education.

Its areas of involvement include comparing international education systems, developing education markets in other countries, researching education syllabi and curricula, and collecting education information and statistics. One of its primary objectives is to increase global access to Canadian universities.

In recent years, CNEEC research has been focused on China, and it has worked with two Chinese universities to establish the General Study Program (GSP) to recruit Chinese students and provide a pool of students to supplement the international student recruitment of Canadian institutions.

Website: www.cneec.org

EduNova Cooperative Ltd.

EduNova is a cooperative industry association whose members comprise education and training providers in Nova Scotia. It works with its members to raise the international profile of Nova Scotia's education and training programs.

It offers students information and contacts for opportunities via its webpage, where it also markets Nova Scotia as an international study destination. For teachers, it provides resources and advice on opportunities to teach abroad. For organizations and government agencies, it aims to match-make them with appropriate partner institutions to serve their needs.

Its members include eleven universities, a public school, a community college, six independent schools, one corporate organization, three private language schools, and eleven consultants and other service providers. EduNova works both on recruiting students and on securing international training contracts and partnerships for its members.

Website: www.edunova.ca

Industry Canada

Industry Canada is a department of the Canadian government. Its mandate is to support the development and competitiveness of a knowledge-based Canadian economy. Its programs seek to develop industry and technology capabilities, augment science and technology research, and promote tourism, trade, investment, and small business development.

Via its activities, Industry Canada is involved in international strategies, including international education strategies. For example, part of its drive toward creating a competitive and sustainable marketplace involves developing the skilled labour market, which also involves investigating the retention of skilled international students.

Website: www.ic.gc.ca

International Council for Canadian Studies (ICCS)

The International Council for Canadian Studies (ICCS) is an incorporated, non-profit federation of 21 Canadian Studies associations and six associate members spanning 39 countries. Its mandate is to promote worldwide study,

research, teaching, and publication on Canada, across all disciplines and countries.

The ICCS network links over 7,000 academics and researchers who work on Canadian topics. In addition to administering its own fellowship, scholarship and award programs, ICCS also acts as an administrative agent for most of DFAIT's Canadian Studies Programs.

It publishes the International Journal of Canadian Studies (IJCS) twice a year, and makes it available on a fee-subscription basis. ICCS also maintains two bibliographical databases online. ICCS operations are supported by membership fees, grants, donations, and contract revenues.

Website: www.iccs-ciec.ca

International Educators Association of Canada (IEAC)

IEAC is a membership organization of international education practitioners. Its mission is to enhance the quality of international education in Canada by providing professional development workshops, seminars and courses for its members, facilitating mentorship in the education sector, facilitating applied research and development (particularly regarding the services and resources needed to internationalize Canadian education), building relationships between associations involved in international education, and setting standards for the training of international education professionals.

It hosts a password-protected member section on its website providing paying members with access to research, e-publications, and reduced seminar and conference registration fees.

Website: www.ieac.ca

International Public School Education Association, British Columbia (IPSEA)

IPSEA is an association of BC public schools that hosts programs for international students. These schools secure home stay placement, provide opportunities for recreation and Canadian cultural immersion, and provide ESL support for international students. The IPSEA website provides information about BC, schools in BC, and the school district system. However, it does not offer many other resources, and students must apply directly to schools for placement.

Website: www.studyinbc.org/ipsea.htm

Manitoba Council for International Education (MCIE)

The Manitoba Council for International Education (MCIE) is composed of 24 institutions which support the Council through membership and volunteer participation. Each member institution has active international education programs in Manitoba and engages in international student recruitment. MCIE's members include public school divisions representing elementary, junior high and high schools, private elementary to secondary schools, language schools, colleges, and universities.

Its mandate is to act as a forum for information on international education in the province, serve as a resource for members through professional development seminars and workshops, foster collaboration in international education promotion in Manitoba, coordinate joint marketing activities, advocate on behalf of its members and for international education, and collaborate with international education groups outside Manitoba.

Website: www.mcie.ca

Manitoba International Education Branch (IEB)

The Manitoba International Education Branch (IEB) is a governmental division created in 2001 to maximize the benefits of international education to the Manitoban economy, residents, and institutions. IEB develops international education policy and provides enquiry support for international students.

It helps to coordinate the Manitoban government's international activities by working with various departments, including Education, Citizenship and Youth and Advanced Education and Literacy, as well as with Manitoban institutions and organizations. It also works with overseas schools to make Canadian elementary and secondary school curricula available to students abroad.

Website: www.gov.mb.ca/ie

New Brunswick Department of Post-Secondary Education, Training and Labour

The Ministry looks after post-secondary education, employment development, and workforce-related issues. Within its post-secondary section, it provides a list of New Brunswick post-secondary institutions and information on private occupational training.

It also introduces the New Brunswick Opportunities Fund, a money-matching program to help institutions raise funds for need-based bursaries, and provides information on how to become a recognized degree-granting institution in the province.

Website: www.gnb.ca/0105/index-e.asp

Newfoundland and Labrador Department of Education

The Department of Education's portfolio includes early childhood learning, the K-12 system, post-secondary education and skills training, and adult literacy. The Department provides statistics and research for the education sector, as well as information and application materials for student financial aid and scholarships.

It offers career counselling to students through Career Counselling Specialists to promote sound career decision-making and to help students graduate from post-secondary education.

Website: www.ed.gov.nl.ca/edu

Northwest Territories Department of Education, Culture and Employment

The Department's mandate covers the Northwest Territories' (NWT) early childhood, K-12, post-secondary and adult education; career development and employment; apprenticeship and occupational certification; culture, heritage and languages; income security; and employment standards. In the adult education section, the College and Career Development Division supports the delivery of post-secondary programs in the NWT.

The Department also has a student financial assistance website, which provides an online version of the student financial assistance handbook, downloadable forms, access to online services and applications, information on loan repayment, and a capsule of funding, internship and employment opportunities.

Website: www.ece.gov.nt.ca

Nova Scotia Department of Education and Culture

The Department's mandate includes all of Nova Scotia's education system, from school entry through post-secondary education, as well as the management of public libraries. It comprises several operational units: Acadian and French language services, public schools, corporate policy, corporate services, and higher education. The higher education unit provides funding, services and support to post-secondary institutions.

Website: www.ednet.ns.ca

Nunavut Department of Education

The Department's financial assistance program is Financial Assistance for Nunavut Students (FANS), for which it has a separate website. It is administered by the Adult Learning and Post-Secondary Services Division. The website provides an application guide, a list of eligible institutions, and other similar information.

Website: www.gov.nu.ca/education/eng (Most of the website is still under development.)

Ontario Ministry of Education, Study in Ontario

The Ministry administers Ontario's network of publicly funded elementary and secondary schools. It focuses on three goals: high levels of student achievement, reduced gaps in student achievement, and high levels of public confidence in public education.

The policy that the Minister of Education sets for student assessment is carried out by the Education Quality and Accountability Office (EQAO). The Ministry's post-secondary portfolio website provides several resources, including Employment Ontario and Second Career, two programs to help job-seekers find training and employment.

The Ministry's international student section links to the *Study In Ontario* website, a marketing and promotion platform to advertise Ontario's educational opportunities.

Websites: www.edu.gov.on.ca, www.studyinontario.com

Quebec Ministry of Education, Leisure and Sport (MELS)

The Ministry's mandate is, in part, to create greater access to higher education. To this end, it has signed several education-related agreements with other countries, independent of the federal government. It contributes to foreign student recruitment by collaborating with the Ministry of International Relations to negotiate bilateral agreements, one recent example being an agreement that exempts some students from paying foreign student tuition fees. The Ministry is also responsible for financial affairs related to tuition and scholarships.

Website: www.mels.gouv.qc.ca

Saskatchewan Ministry of Advanced Education and Employment

The Ministry is mainly concerned with post-secondary and adult education and labour mobility issues. In these fields, it administers various programs and services, such as the Can-Sask Rapid Response Teams which offer personalized solutions for employers and employees dealing with difficulties; the Community Development Trust Fund, which allocates funds to provide basic education and skills training for adults in transition; the Innovation and Science Fund, which supports research projects at Saskatchewan institutions; Technology Enhanced Learning, a program to extend access to education and training; and many others.

The Ministry is organized into several branches. One of these is the International Education Branch, which works with local and overseas education providers to promote Saskatchewan as an international study destination, and ease the transition of international students into the post-secondary education and labour markets.

Website: www.aeel.gov.sk.ca

Statistics Canada

Statistics Canada is the nation's central statistical agency, legislated to provide statistics for the whole of Canada and each of the provinces. Its mandate is to "collect, compile, analyze, abstract and publish statistical information" on Canada's economic and social structure, as well as to promote sound statistical standards and practices.

It conducts a census every five years, and has approximately 350 active surveys on several aspects of Canadian life. One of its areas of study is education, training and learning. In this area, it publishes a bimonthly periodical on education issues, research papers on education and adult literacy, and provides learning resources for teachers and students by school subject.

Website: www.statcan.gc.ca

World University Service of Canada (WUSC)

The World University Service of Canada (WUSC) is a network of individuals and post-secondary institutions, whose aim is to promote global human development through education and training. A registered charity, it operates both within Canada's campuses and overseas, where it has development projects in the Balkans, Botswana, Burkina Faso, Ghana, Haiti, Malawi, Peru, Sri Lanka and Vietnam, working in the areas of education and health, sustainable livelihoods, and governance.

Its main tool is international volunteer cooperation – it mobilizes more than 1,000 volunteers from Canada and 13 developing countries through Uniterra, a joint five-year program of WUSC and the Centre for International Studies (CECI). In Canada, WUSC links Canada's colleges and universities with its overseas activities.

Some of its programs include the Student Refugee Program, which supports students fleeing persecution in their home country to resume their studies in Canada; an International Seminar and Students Without Borders, a program that enables students to work in the developing world while earning credits; and scholarship programs.

Website: www.wusc.ca/en

Yukon Ministry of Education

The Ministry has three branches: Public Schools, Advanced Education, and Education Support Services. The latter branch provides logistical and administrative support to the former two. The Public Schools branch oversees the K-12 public education system in Yukon, comprising 14 schools.

The Advanced Education branch offers apprenticeship and tradesperson qualifications, student training and employment, student financial assistance, community training funds, literacy programs, Targeted Initiative for Older Workers (TIOW), trade school registration, and the Yukon Nominee Program.

The latter program was created to allow the Yukon government to nominate potential immigrants based on economic priorities, labour market conditions, and the nominees' likely ability to integrate into Yukon society. This branch advises students on how to apply for financial aid, and provides information on the Ministry's funding and scholarship programs. Most application forms for the Ministry's services and programs are available as PDF files on the website.

Website: www.education.gov.yk.ca

# 9. APPENDIX – DATA

## Australia

### Higher Education Enrolment (Total, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 3,712 | 6,535 | 16,054 | 22,332 | 30,376 | 39,961 | 45,544 | 47,928 | 51,600 |
| India | 4,374 | 5,923 | 8,835 | 12,232 | 17,723 | 22,074 | 24,947 | 26,181 | 27,701 |
| Malaysia | 9,866 | 9,761 | 13,514 | 15,385 | 15,843 | 15,291 | 14,808 | 15,080 | 15,652 |
| Hong Kong | 6,502 | 7,053 | 8,314 | 10,089 | 10,842 | 10,566 | 9,667 | 8,888 | 8,552 |
| Singapore | 8,647 | 8,852 | 10,398 | 10,162 | 9,198 | 8,306 | 7,824 | 7,454 | 7,499 |
| Indonesia | 9,283 | 9,907 | 11,362 | 11,314 | 10,495 | 9,503 | 8,608 | 7,843 | 7,473 |
| Korea | 2,174 | 2,645 | 3,663 | 4,439 | 4,926 | 5,259 | 5,450 | 5,824 | 6,369 |
| Thailand | 2,716 | 3,197 | 4,879 | 5,599 | 5,647 | 5,182 | 4,835 | 4,678 | 4,260 |
| Vietnam | 1,257 | 1,495 | 1,729 | 2,005 | 2,158 | 2,356 | 2,568 | 2,936 | 3,908 |
| Taiwan | 2,440 | 2,812 | 3,837 | 4,056 | 4,134 | 3,904 | 3,774 | 3,648 | 3,458 |
| **Total Enrolment** | **72,717** | **86,271** | **115,340** | **134,762** | **150,690** | **162,680** | **169,710** | **174,577** | **182,770** |

Sources: Data for 2002-2008 are sourced from AEI International Student Enrolment Data Pivot 2008; data for 2000-2001 are sourced from AEI Overseas Students 2001 Annual Tables.

### Higher Education Enrolment (Share, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 5.1% | 7.6% | 13.9% | 16.6% | 20.2% | 24.6% | 26.8% | 27.5% | 28.2% |
| India | 6.0% | 6.9% | 7.7% | 9.1% | 11.8% | 13.6% | 14.7% | 15.0% | 15.2% |
| Malaysia | 13.6% | 11.3% | 11.7% | 11.4% | 10.5% | 9.4% | 8.7% | 8.6% | 8.6% |
| Hong Kong | 8.9% | 8.2% | 7.2% | 7.5% | 7.2% | 6.5% | 5.7% | 5.1% | 4.7% |
| Singapore | 11.9% | 10.3% | 9.0% | 7.5% | 6.1% | 5.1% | 4.6% | 4.3% | 4.1% |
| Indonesia | 12.8% | 11.5% | 9.9% | 8.4% | 7.0% | 5.8% | 5.1% | 4.5% | 4.1% |
| Korea | 3.0% | 3.1% | 3.2% | 3.3% | 3.3% | 3.2% | 3.2% | 3.3% | 3.5% |
| Thailand | 3.7% | 3.7% | 4.2% | 4.2% | 3.7% | 3.2% | 2.8% | 2.7% | 2.3% |
| Vietnam | 1.7% | 1.7% | 1.5% | 1.5% | 1.4% | 1.4% | 1.5% | 1.7% | 2.1% |
| Taiwan | 3.4% | 3.3% | 3.3% | 3.0% | 2.7% | 2.4% | 2.2% | 2.1% | 1.9% |
| **Total Enrolment** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

Sources: Data for 2002-2008 are sourced from AEI International Student Enrolment Data Pivot 2008; data for 2000-2001 are sourced from AEI Overseas Students 2001 Annual Tables.

## Higher Education Enrolment (Index, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 100 | 176 | 432 | 602 | 818 | 1,077 | 1,227 | 1,291 | 1,390 |
| India | 100 | 135 | 202 | 280 | 405 | 505 | 570 | 599 | 633 |
| Malaysia | 100 | 99 | 137 | 156 | 161 | 155 | 150 | 153 | 159 |
| Hong Kong | 100 | 108 | 128 | 155 | 167 | 163 | 149 | 137 | 132 |
| Singapore | 100 | 102 | 120 | 118 | 106 | 96 | 90 | 86 | 87 |
| Indonesia | 100 | 107 | 122 | 122 | 113 | 102 | 93 | 84 | 81 |
| Korea | 100 | 122 | 168 | 204 | 227 | 242 | 251 | 268 | 293 |
| Thailand | 100 | 118 | 180 | 206 | 208 | 191 | 178 | 172 | 157 |
| Vietnam | 100 | 119 | 138 | 160 | 172 | 187 | 204 | 234 | 311 |
| Taiwan | 100 | 115 | 157 | 166 | 169 | 160 | 155 | 150 | 142 |
| **Total Enrolment** | **100** | **119** | **159** | **185** | **207** | **224** | **233** | **240** | **251** |

Notes: Index set to 100 for 2000.
Sources: Data for 2002-2008 are sourced from AEI International Student Enrolment Data Pivot 2008; data for 2000-2001 are sourced from AEI Overseas Students 2001 Annual Tables.

## Higher Education Enrolment (YoY Growth, Top 10 Source Countries)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|
| China | 76.1% | 145.7% | 39.1% | 36.0% | 31.6% | 14.0% | 5.2% | 7.7% |
| India | 35.4% | 49.2% | 38.4% | 44.9% | 24.6% | 13.0% | 4.9% | 5.8% |
| Malaysia | -1.1% | 38.4% | 13.8% | 3.0% | -3.5% | -3.2% | 1.8% | 3.8% |
| Hong Kong | 8.5% | 17.9% | 21.3% | 7.5% | -2.5% | -8.5% | -8.1% | -3.8% |
| Singapore | 2.4% | 17.5% | -2.3% | -9.5% | -9.7% | -5.8% | -4.7% | 0.6% |
| Indonesia | 6.7% | 14.7% | -0.4% | -7.2% | -9.5% | -9.4% | -8.9% | -4.7% |
| Korea | 21.7% | 38.5% | 21.2% | 11.0% | 6.8% | 3.6% | 6.9% | 9.4% |
| Thailand | 17.7% | 52.6% | 14.8% | 0.9% | -8.2% | -6.7% | -3.2% | -8.9% |
| Vietnam | 18.9% | 15.7% | 16.0% | 7.6% | 9.2% | 9.0% | 14.3% | 33.1% |
| Taiwan | 15.2% | 36.5% | 5.7% | 1.9% | -5.6% | -3.3% | -3.3% | -5.2% |
| **Total Enrolment** | **18.6%** | **33.7%** | **16.8%** | **11.8%** | **8.0%** | **4.3%** | **2.9%** | **4.7%** |

Sources: Data for 2002-2008 are sourced from AEI International Student Enrolment Data Pivot 2008; data for 2000-2001 are sourced from AEI Overseas Students 2001 Annual Tables.

## Key Organizational Statistics: Australian Education International (AEI)

| | |
|---|---|
| **Staff headcount** | |
| Full-time | 200 |
| **Total staff headcount** | **200** |
| | |
| **Number of offices** | |
| In Australia (headquarter) | 1 |
| Outside Australia | 25 |
| **Total number of offices** | **26** |
| | |
| **Expenses** | |
| Administered expenses | |
| International education and training | AUD 38,828,000 |
| Assessment subsidy for overseas trained professionals | AUD 743,000 |
| Departmental outputs | |
| Program management | AUD 46,373,000 |
| Policy services | AUD 8,638,000 |
| Service delivery | AUD 1,130,000 |
| **Total expenses** | **AUD 95,712,000** |
| | |
| **Funding** | |
| Revenue from government | AUD 31,151,000 |
| Revenue from other sources | AUD 24,990,000 |
| **Total funding (for departmental outputs)** | **AUD 56,141,000** |

Notes: Staff and budget figures are based on DEEWR resourcing for "Outcome 6: International Influence, Australian Education". Staff headcount is for 2007-08; the estimate for 2008-09 is 190. Budget figures are for 2008-09.
Sources: DEEWR Annual Report and AEI website.

## Key Organizational Statistics: IDP Education (IDP)

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount | 600 |
| **Total staff headcount** | **600** |
| | |
| **Number of offices** | |
| In Australia | 7 |
| Outside Australia | 75 |
| **Total number of offices** | **82** |
| | |
| **Expenses** | |
| Expenses | n/a |
| **Total expenses** | **n/a** |
| | |
| **Funding** | |
| Funding | n/a |
| **Total funding** | **n/a** |

Notes: Number of offices figure includes four Australian Student Services offices, three Corporate Offices in Australia, and 75 Student Offices worldwide.
Source: IDP website.

# Canada

## Enrolment of International Students in all Sectors (Total, Top 25 Source Countries)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| China | 6,465 | 11,055 | 20,415 | 29,807 | 36,611 | 39,296 | 39,592 | 39,843 | 41,087 | 42,154 |
| Korea | 11,030 | 15,704 | 20,738 | 24,132 | 25,562 | 26,719 | 27,251 | 29,035 | 30,084 | 27,440 |
| USA | 10,766 | 11,841 | 12,685 | 12,767 | 12,645 | 12,589 | 12,676 | 12,357 | 12,003 | 11,317 |
| France | 5,733 | 6,285 | 6,743 | 6,323 | 6,480 | 6,592 | 6,739 | 7,774 | 8,352 | 8,553 |
| India | 1,335 | 1,749 | 2,445 | 3,832 | 5,364 | 5,759 | 6,286 | 6,690 | 6,932 | 7,314 |
| Japan | 10,275 | 10,274 | 11,123 | 10,608 | 9,722 | 9,446 | 9,370 | 8,512 | 7,791 | 6,627 |
| Saudi Arabia | 471 | 539 | 645 | 739 | 975 | 1,187 | 1,468 | 1,596 | 2,286 | 4,672 |
| Taiwan | 5,610 | 5,987 | 5,872 | 5,934 | 5,390 | 5,286 | 4,961 | 4,902 | 4,744 | 4,127 |
| Hong Kong | 6,457 | 6,402 | 6,380 | 6,354 | 5,973 | 5,671 | 5,173 | 4,765 | 4,485 | 4,126 |
| Mexico | 3,032 | 3,856 | 4,558 | 3,690 | 3,233 | 3,392 | 3,599 | 3,791 | 3,830 | 3,853 |
| Germany | 1,969 | 2,233 | 2,333 | 2,290 | 2,246 | 2,327 | 2,455 | 2,615 | 2,941 | 3,184 |
| UK | 2,325 | 2,386 | 2,673 | 2,532 | 2,385 | 2,390 | 2,454 | 2,630 | 2,767 | 2,856 |
| Iran | 639 | 627 | 673 | 904 | 1,270 | 1,735 | 2,248 | 2,095 | 2,150 | 2,173 |
| Brazil | 1,439 | 1,552 | 1,655 | 1,350 | 1,100 | 1,175 | 1,337 | 1,483 | 1,801 | 2,141 |
| Morocco | 1,273 | 1,459 | 1,567 | 1,578 | 1,518 | 1,457 | 1,498 | 1,660 | 1,870 | 2,118 |
| Nigeria | 247 | 387 | 437 | 481 | 804 | 1,029 | 1,258 | 1,365 | 1,643 | 1,786 |
| UAE | 460 | 687 | 909 | 1,120 | 1,268 | 1,374 | 1,445 | 1,414 | 1,510 | 1,630 |
| Pakistan | 1,271 | 1,368 | 1,449 | 1,333 | 1,300 | 1,269 | 1,245 | 1,323 | 1,409 | 1,554 |
| Vietnam | 369 | 560 | 785 | 1,087 | 1,592 | 1,716 | 1,654 | 1,461 | 1,370 | 1,516 |
| Bangladesh | 337 | 489 | 744 | 1,143 | 1,404 | 1,574 | 1,546 | 1,481 | 1,380 | 1,426 |
| Russia | 556 | 647 | 694 | 709 | 726 | 780 | 864 | 925 | 1,085 | 1,339 |
| Turkey | 361 | 551 | 685 | 859 | 895 | 1,014 | 1,115 | 1,150 | 1,214 | 1,295 |
| Indonesia | 939 | 1,085 | 1,152 | 1,273 | 1,498 | 1,592 | 1,549 | 1,387 | 1,324 | 1,211 |
| Malaysia | 1,208 | 1,085 | 1,024 | 925 | 1,010 | 961 | 974 | 983 | 1,030 | 1,181 |
| Tunisia | 711 | 890 | 1,050 | 1,219 | 1,201 | 1,063 | 968 | 926 | 1,023 | 1,139 |
| **Top 25 Countries** | **75,278** | **89,698** | **109,434** | **122,989** | **132,172** | **137,393** | **139,725** | **142,163** | **146,111** | **146,732** |
| Other Countries | 21,713 | 23,987 | 26,768 | 26,998 | 26,867 | 26,711 | 26,675 | 27,087 | 28,928 | 30,191 |
| Countries not stated | 345 | 413 | 530 | 554 | 672 | 734 | 762 | 896 | 1,038 | 1,304 |
| **Total Enrolment** | **97,336** | **114,098** | **136,732** | **150,541** | **159,711** | **164,838** | **167,162** | **170,146** | **176,077** | **178,227** |
| Total enrolment (excl. China) | 90,871 | 103,043 | 116,317 | 120,734 | 123,100 | 125,542 | 127,570 | 130,303 | 134,990 | 136,073 |
| Total enrolment (excl. China, India) | 89,536 | 101,294 | 113,872 | 116,902 | 117,736 | 119,783 | 121,284 | 123,613 | 128,058 | 128,759 |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students in all Sectors (Total, Top 5 Asian Source Countries)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| China | 6,465 | 11,055 | 20,415 | 29,807 | 36,611 | 39,296 | 39,592 | 39,843 | 41,087 | 42,154 |
| Korea | 11,030 | 15,704 | 20,738 | 24,132 | 25,562 | 26,719 | 27,251 | 29,035 | 30,084 | 27,440 |
| India | 1,335 | 1,749 | 2,445 | 3,832 | 5,364 | 5,759 | 6,286 | 6,690 | 6,932 | 7,314 |
| Japan | 10,275 | 10,274 | 11,123 | 10,608 | 9,722 | 9,446 | 9,370 | 8,512 | 7,791 | 6,627 |
| Taiwan | 5,610 | 5,987 | 5,872 | 5,934 | 5,390 | 5,286 | 4,961 | 4,902 | 4,744 | 4,127 |
| **Top 5 Asia** | **34,715** | **44,769** | **60,593** | **74,313** | **82,649** | **86,506** | **87,460** | **88,982** | **90,638** | **87,662** |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students in all Sectors (Share, by Region)

| | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Asia-Pacific | 50.3% | 50.1% | 52.1% | 55.7% | 60.2% | 62.5% | 62.9% | 62.3% | 61.6% | 60.4% | 58.2% |
| Europe | 16.9% | 16.9% | 15.8% | 14.2% | 12.2% | 11.3% | 11.1% | 11.3% | 12.1% | 12.5% | 14.3% |
| Africa/Middle East | 11.0% | 11.1% | 11.2% | 10.8% | 10.7% | 10.8% | 10.9% | 11.2% | 11.1% | 12.2% | 13.4% |
| Central/South America | 10.1% | 10.5% | 10.2% | 9.7% | 8.1% | 7.0% | 7.0% | 7.2% | 7.4% | 7.5% | 7.0% |
| North America | 11.5% | 11.1% | 10.4% | 9.3% | 8.5% | 7.9% | 7.6% | 7.6% | 7.2% | 6.7% | 7.0% |
| Other | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | 0.5% | 0.5% | 0.6% | 0.7% | 0.2% |
| **Total** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

Sources: Data for 1998-2007 are sourced from Citizenship and Immigration Canada, RDM, Facts & Figures 2007; data for 2008 are sourced from Citizenship & Immigration Canada, RDM, Facts and Figures 2008.

## Enrolment of International Students in all Sectors (Share, Top 25 Source Countries)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| China | 6.6% | 9.7% | 14.9% | 19.8% | 22.9% | 23.8% | 23.7% | 23.4% | 23.3% | 23.7% |
| Korea | 11.3% | 13.8% | 15.2% | 16.0% | 16.0% | 16.2% | 16.3% | 17.1% | 17.1% | 15.4% |
| USA | 11.1% | 10.4% | 9.3% | 8.5% | 7.9% | 7.6% | 7.6% | 7.3% | 6.8% | 6.3% |
| France | 5.9% | 5.5% | 4.9% | 4.2% | 4.1% | 4.0% | 4.0% | 4.6% | 4.7% | 4.8% |
| India | 1.4% | 1.5% | 1.8% | 2.5% | 3.4% | 3.5% | 3.8% | 3.9% | 3.9% | 4.1% |
| Japan | 10.6% | 9.0% | 8.1% | 7.0% | 6.1% | 5.7% | 5.6% | 5.0% | 4.4% | 3.7% |
| Saudi Arabia | 0.5% | 0.5% | 0.5% | 0.5% | 0.6% | 0.7% | 0.9% | 0.9% | 1.3% | 2.6% |
| Taiwan | 5.8% | 5.2% | 4.3% | 3.9% | 3.4% | 3.2% | 3.0% | 2.9% | 2.7% | 2.3% |
| Hong Kong | 6.6% | 5.6% | 4.7% | 4.2% | 3.7% | 3.4% | 3.1% | 2.8% | 2.5% | 2.3% |
| Mexico | 3.1% | 3.4% | 3.3% | 2.5% | 2.0% | 2.1% | 2.2% | 2.2% | 2.2% | 2.2% |
| Germany | 2.0% | 2.0% | 1.7% | 1.5% | 1.4% | 1.4% | 1.5% | 1.5% | 1.7% | 1.8% |
| UK | 2.4% | 2.1% | 2.0% | 1.7% | 1.5% | 1.4% | 1.5% | 1.5% | 1.6% | 1.6% |
| Iran | 0.7% | 0.5% | 0.5% | 0.6% | 0.8% | 1.1% | 1.3% | 1.2% | 1.2% | 1.2% |
| Brazil | 1.5% | 1.4% | 1.2% | 0.9% | 0.7% | 0.7% | 0.8% | 0.9% | 1.0% | 1.2% |
| Morocco | 1.3% | 1.3% | 1.1% | 1.0% | 1.0% | 0.9% | 0.9% | 1.0% | 1.1% | 1.2% |
| Nigeria | 0.3% | 0.3% | 0.3% | 0.3% | 0.5% | 0.6% | 0.8% | 0.8% | 0.9% | 1.0% |
| UAE | 0.5% | 0.6% | 0.7% | 0.7% | 0.8% | 0.8% | 0.9% | 0.8% | 0.9% | 0.9% |
| Pakistan | 1.3% | 1.2% | 1.1% | 0.9% | 0.8% | 0.8% | 0.7% | 0.8% | 0.8% | 0.9% |
| Vietnam | 0.4% | 0.5% | 0.6% | 0.7% | 1.0% | 1.0% | 1.0% | 0.9% | 0.8% | 0.9% |
| Bangladesh | 0.3% | 0.4% | 0.5% | 0.8% | 0.9% | 1.0% | 0.9% | 0.9% | 0.8% | 0.8% |
| Russia | 0.6% | 0.6% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.5% | 0.6% | 0.8% |
| Turkey | 0.4% | 0.5% | 0.5% | 0.6% | 0.6% | 0.6% | 0.7% | 0.7% | 0.7% | 0.7% |
| Indonesia | 1.0% | 1.0% | 0.8% | 0.8% | 0.9% | 1.0% | 0.9% | 0.8% | 0.8% | 0.7% |
| Malaysia | 1.2% | 1.0% | 0.7% | 0.6% | 0.6% | 0.6% | 0.6% | 0.6% | 0.6% | 0.7% |
| Tunisia | 0.7% | 0.8% | 0.8% | 0.8% | 0.8% | 0.6% | 0.6% | 0.5% | 0.6% | 0.6% |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students in all Sectors (Index, Top 25 Source Countries)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| Saudi Arabia | 100 | 114 | 137 | 157 | 207 | 252 | 312 | 339 | 485 | 992 |
| Nigeria | 100 | 157 | 177 | 195 | 326 | 417 | 509 | 553 | 665 | 723 |
| China | 100 | 171 | 316 | 461 | 566 | 608 | 612 | 616 | 636 | 652 |
| India | 100 | 131 | 183 | 287 | 402 | 431 | 471 | 501 | 519 | 548 |
| Bangladesh | 100 | 145 | 221 | 339 | 417 | 467 | 459 | 439 | 409 | 423 |
| Vietnam | 100 | 152 | 213 | 295 | 431 | 465 | 448 | 396 | 371 | 411 |
| Turkey | 100 | 153 | 190 | 238 | 248 | 281 | 309 | 319 | 336 | 359 |
| UAE | 100 | 149 | 198 | 243 | 276 | 299 | 314 | 307 | 328 | 354 |
| Iran | 100 | 98 | 105 | 141 | 199 | 272 | 352 | 328 | 336 | 340 |
| Korea | 100 | 142 | 188 | 219 | 232 | 242 | 247 | 263 | 273 | 249 |
| Russia | 100 | 116 | 125 | 128 | 131 | 140 | 155 | 166 | 195 | 241 |
| Morocco | 100 | 115 | 123 | 124 | 119 | 114 | 118 | 130 | 147 | 166 |
| Germany | 100 | 113 | 118 | 116 | 114 | 118 | 125 | 133 | 149 | 162 |
| Tunisia | 100 | 125 | 148 | 171 | 169 | 150 | 136 | 130 | 144 | 160 |
| France | 100 | 110 | 118 | 110 | 113 | 115 | 118 | 136 | 146 | 149 |
| Brazil | 100 | 108 | 115 | 94 | 76 | 82 | 93 | 103 | 125 | 149 |
| Indonesia | 100 | 116 | 123 | 136 | 160 | 170 | 165 | 148 | 141 | 129 |
| Mexico | 100 | 127 | 150 | 122 | 107 | 112 | 119 | 125 | 126 | 127 |
| UK | 100 | 103 | 115 | 109 | 103 | 103 | 106 | 113 | 119 | 123 |
| Pakistan | 100 | 108 | 114 | 105 | 102 | 100 | 98 | 104 | 111 | 122 |
| USA | 100 | 110 | 118 | 119 | 117 | 117 | 118 | 115 | 111 | 105 |
| Malaysia | 100 | 90 | 85 | 77 | 84 | 80 | 81 | 81 | 85 | 98 |
| Taiwan | 100 | 107 | 105 | 106 | 96 | 94 | 88 | 87 | 85 | 74 |
| Japan | 100 | 100 | 108 | 103 | 95 | 92 | 91 | 83 | 76 | 64 |
| Hong Kong | 100 | 99 | 99 | 98 | 93 | 88 | 80 | 74 | 69 | 64 |

Notes: Index set to 100 for 1999.
Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students in all Sectors (YoY Growth, Top 25 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Saudi Arabia | 14.4% | 19.7% | 14.6% | 31.9% | 21.7% | 23.7% | 8.7% | 43.2% | 104.4% |
| Russia | 16.4% | 7.3% | 2.2% | 2.4% | 7.4% | 10.8% | 7.1% | 17.3% | 23.4% |
| Brazil | 7.9% | 6.6% | -18.4% | -18.5% | 6.8% | 13.8% | 10.9% | 21.4% | 18.9% |
| Malaysia | -10.2% | -5.6% | -9.7% | 9.2% | -4.9% | 1.4% | 0.9% | 4.8% | 14.7% |
| Morocco | 14.6% | 7.4% | 0.7% | -3.8% | -4.0% | 2.8% | 10.8% | 12.7% | 13.3% |
| Tunisia | 25.2% | 18.0% | 16.1% | -1.5% | -11.5% | -8.9% | -4.3% | 10.5% | 11.3% |
| Vietnam | 51.8% | 40.2% | 38.5% | 46.5% | 7.8% | -3.6% | -11.7% | -6.2% | 10.7% |
| Pakistan | 7.6% | 5.9% | -8.0% | -2.5% | -2.4% | -1.9% | 6.3% | 6.5% | 10.3% |
| Nigeria | 56.7% | 12.9% | 10.1% | 67.2% | 28.0% | 22.3% | 8.5% | 20.4% | 8.7% |
| Germany | 13.4% | 4.5% | -1.8% | -1.9% | 3.6% | 5.5% | 6.5% | 12.5% | 8.3% |
| UAE | 49.3% | 32.3% | 23.2% | 13.2% | 8.4% | 5.2% | -2.1% | 6.8% | 7.9% |
| Turkey | 52.6% | 24.3% | 25.4% | 4.2% | 13.3% | 10.0% | 3.1% | 5.6% | 6.7% |
| India | 31.0% | 39.8% | 56.7% | 40.0% | 7.4% | 9.2% | 6.4% | 3.6% | 5.5% |
| Bangladesh | 45.1% | 52.1% | 53.6% | 22.8% | 12.1% | -1.8% | -4.2% | -6.8% | 3.3% |
| UK | 2.6% | 12.0% | -5.3% | -5.8% | 0.2% | 2.7% | 7.2% | 5.2% | 3.2% |
| China | 71.0% | 84.7% | 46.0% | 22.8% | 7.3% | 0.8% | 0.6% | 3.1% | 2.6% |
| France | 9.6% | 7.3% | -6.2% | 2.5% | 1.7% | 2.2% | 15.4% | 7.4% | 2.4% |
| Iran | -1.9% | 7.3% | 34.3% | 40.5% | 36.6% | 29.6% | -6.8% | 2.6% | 1.1% |
| Mexico | 27.2% | 18.2% | -19.0% | -12.4% | 4.9% | 6.1% | 5.3% | 1.0% | 0.6% |
| USA | 10.0% | 7.1% | 0.6% | -1.0% | -0.4% | 0.7% | -2.5% | -2.9% | -5.7% |
| Hong Kong | -0.9% | -0.3% | -0.4% | -6.0% | -5.1% | -8.8% | -7.9% | -5.9% | -8.0% |
| Indonesia | 15.5% | 6.2% | 10.5% | 17.7% | 6.3% | -2.7% | -10.5% | -4.5% | -8.5% |
| Korea | 42.4% | 32.1% | 16.4% | 5.9% | 4.5% | 2.0% | 6.5% | 3.6% | -8.8% |
| Taiwan | 6.7% | -1.9% | 1.1% | -9.2% | -1.9% | -6.1% | -1.2% | -3.2% | -13.0% |
| Japan | 0.0% | 8.3% | -4.6% | -8.4% | -2.8% | -0.8% | -9.2% | -8.5% | -14.9% |
| | | | | | | | | | |
| **Total Enrolment** | **17.2%** | **19.8%** | **10.1%** | **6.1%** | **3.2%** | **1.4%** | **1.8%** | **3.5%** | **1.2%** |
| Total Enrolment (excl. China) | 13.4% | 12.9% | 3.8% | 2.0% | 2.0% | 1.6% | 2.1% | 3.6% | 0.8% |
| Total Enrolment (excl. China, India) | 13.1% | 12.4% | 2.7% | 0.7% | 1.7% | 1.3% | 1.9% | 3.6% | 0.5% |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students in all Sectors (YoY Growth, Top 25 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 71.0% | 84.7% | 46.0% | 22.8% | 7.3% | 0.8% | 0.6% | 3.1% | 2.6% |
| Korea | 42.4% | 32.1% | 16.4% | 5.9% | 4.5% | 2.0% | 6.5% | 3.6% | -8.8% |
| USA | 10.0% | 7.1% | 0.6% | -1.0% | -0.4% | 0.7% | -2.5% | -2.9% | -5.7% |
| France | 9.6% | 7.3% | -6.2% | 2.5% | 1.7% | 2.2% | 15.4% | 7.4% | 2.4% |
| India | 31.0% | 39.8% | 56.7% | 40.0% | 7.4% | 9.2% | 6.4% | 3.6% | 5.5% |
| Japan | 0.0% | 8.3% | -4.6% | -8.4% | -2.8% | -0.8% | -9.2% | -8.5% | -14.9% |
| Saudi Arabia | 14.4% | 19.7% | 14.6% | 31.9% | 21.7% | 23.7% | 8.7% | 43.2% | 104.4% |
| Taiwan | 6.7% | -1.9% | 1.1% | -9.2% | -1.9% | -6.1% | -1.2% | -3.2% | -13.0% |
| Hong Kong | -0.9% | -0.3% | -0.4% | -6.0% | -5.1% | -8.8% | -7.9% | -5.9% | -8.0% |
| Mexico | 27.2% | 18.2% | -19.0% | -12.4% | 4.9% | 6.1% | 5.3% | 1.0% | 0.6% |
| Germany | 13.4% | 4.5% | -1.8% | -1.9% | 3.6% | 5.5% | 6.5% | 12.5% | 8.3% |
| UK | 2.6% | 12.0% | -5.3% | -5.8% | 0.2% | 2.7% | 7.2% | 5.2% | 3.2% |
| Iran | -1.9% | 7.3% | 34.3% | 40.5% | 36.6% | 29.6% | -6.8% | 2.6% | 1.1% |
| Brazil | 7.9% | 6.6% | -18.4% | -18.5% | 6.8% | 13.8% | 10.9% | 21.4% | 18.9% |
| Morocco | 14.6% | 7.4% | 0.7% | -3.8% | -4.0% | 2.8% | 10.8% | 12.7% | 13.3% |
| Nigeria | 56.7% | 12.9% | 10.1% | 67.2% | 28.0% | 22.3% | 8.5% | 20.4% | 8.7% |
| UAE | 49.3% | 32.3% | 23.2% | 13.2% | 8.4% | 5.2% | -2.1% | 6.8% | 7.9% |
| Pakistan | 7.6% | 5.9% | -8.0% | -2.5% | -2.4% | -1.9% | 6.3% | 6.5% | 10.3% |
| Vietnam | 51.8% | 40.2% | 38.5% | 46.5% | 7.8% | -3.6% | -11.7% | -6.2% | 10.7% |
| Bangladesh | 45.1% | 52.1% | 53.6% | 22.8% | 12.1% | -1.8% | -4.2% | -6.8% | 3.3% |
| Russia | 16.4% | 7.3% | 2.2% | 2.4% | 7.4% | 10.8% | 7.1% | 17.3% | 23.4% |
| Turkey | 52.6% | 24.3% | 25.4% | 4.2% | 13.3% | 10.0% | 3.1% | 5.6% | 6.7% |
| Indonesia | 15.5% | 6.2% | 10.5% | 17.7% | 6.3% | -2.7% | -10.5% | -4.5% | -8.5% |
| Malaysia | -10.2% | -5.6% | -9.7% | 9.2% | -4.9% | 1.4% | 0.9% | 4.8% | 14.7% |
| Tunisia | 25.2% | 18.0% | 16.1% | -1.5% | -11.5% | -8.9% | -4.3% | 10.5% | 11.3% |

Notes: Sorted by total enrolment figures.
Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students (Total, by Sector and Gender)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Male** | | | | | | | | | | |
| Secondary or less | 12,661 | 14,644 | 16,733 | 17,329 | 16,725 | 16,554 | 16,393 | 17,487 | 18,460 | 18,194 |
| Trade | 6,416 | 8,417 | 10,336 | 11,933 | 13,272 | 13,666 | 13,307 | 12,576 | 12,325 | 10,159 |
| University | 24,822 | 28,647 | 34,356 | 39,576 | 44,496 | 48,704 | 50,609 | 51,395 | 53,098 | 53,314 |
| Other post-secondary | 3,782 | 4,710 | 6,831 | 7,784 | 8,639 | 7,689 | 7,955 | 8,479 | 9,778 | 13,304 |
| Other | 3,128 | 3,326 | 3,879 | 3,509 | 3,125 | 3,005 | 3,058 | 3,008 | 2,831 | 3,475 |
| Level not stated | 53 | 53 | 45 | 48 | 32 | 19 | 20 | 32 | 18 | 21 |
| **Total male** | **50,862** | **59,797** | **72,180** | **80,179** | **86,289** | **89,637** | **91,342** | **92,977** | **96,510** | **98,467** |
| | | | | | | | | | | |
| **Female** | | | | | | | | | | |
| Secondary or less | 11,868 | 13,369 | 14,960 | 15,261 | 14,898 | 14,205 | 14,120 | 15,044 | 16,079 | 16,198 |
| Trade | 6,341 | 8,080 | 9,778 | 10,898 | 11,415 | 11,491 | 10,858 | 10,364 | 10,245 | 8,793 |
| University | 20,872 | 24,507 | 29,232 | 33,369 | 36,605 | 40,038 | 41,397 | 42,108 | 42,961 | 42,095 |
| Other post-secondary | 3,613 | 4,381 | 5,967 | 6,731 | 7,175 | 6,130 | 6,154 | 6,302 | 7,116 | 9,432 |
| Other | 3,728 | 3,891 | 4,566 | 4,078 | 3,301 | 3,319 | 3,264 | 3,324 | 3,147 | 3,212 |
| Level not stated | 38 | 41 | 32 | 15 | 20 | 12 | 20 | 17 | 12 | 22 |
| **Total female** | **46,460** | **54,269** | **64,535** | **70,352** | **73,414** | **75,195** | **75,813** | **77,159** | **79,560** | **79,752** |
| | | | | | | | | | | |
| **Gender not stated** | | | | | | | | | | |
| Secondary or less | 7 | 9 | 5 | 2 | 0 | 0 | 1 | 1 | 0 | 1 |
| Trade | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 1 |
| University | 7 | 15 | 8 | 7 | 8 | 6 | 5 | 6 | 5 | 5 |
| Other post-secondary | 0 | 3 | 1 | 1 | 0 | 0 | 1 | 1 | 0 | 1 |
| Other | 0 | 5 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total gender not stated** | **14** | **32** | **17** | **10** | **8** | **6** | **7** | **10** | **7** | **8** |
| | | | | | | | | | | |
| **Total** | | | | | | | | | | |
| Secondary or less | 24,536 | 28,022 | 31,698 | 32,592 | 31,623 | 30,759 | 30,514 | 32,532 | 34,539 | 34,393 |
| Trade | 12,757 | 16,497 | 20,114 | 22,831 | 24,687 | 25,157 | 24,165 | 22,942 | 22,572 | 18,953 |
| University | 45,701 | 53,169 | 63,596 | 72,952 | 81,109 | 88,748 | 92,011 | 93,509 | 96,064 | 95,414 |
| Other post-secondary | 7,395 | 9,094 | 12,799 | 14,516 | 15,814 | 13,819 | 14,110 | 14,782 | 16,894 | 22,737 |
| Other | 6,947 | 7,316 | 8,525 | 7,650 | 6,478 | 6,355 | 6,362 | 6,381 | 6,008 | 6,730 |
| **Grand total** | **97,336** | **114,098** | **136,732** | **150,541** | **159,711** | **164,838** | **167,162** | **170,146** | **176,077** | **178,227** |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students (Index, by Sector)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| Secondary or less | 100 | 114 | 129 | 133 | 129 | 125 | 124 | 133 | 141 | 140 |
| Trade | 100 | 129 | 158 | 179 | 194 | 197 | 189 | 180 | 177 | 149 |
| University | 100 | 116 | 139 | 160 | 177 | 194 | 201 | 205 | 210 | 209 |
| Other post-secondary | 100 | 123 | 173 | 196 | 214 | 187 | 191 | 200 | 228 | 307 |
| Other | 100 | 105 | 123 | 110 | 93 | 91 | 92 | 92 | 86 | 97 |
| **Total** | **100** | **117** | **140** | **155** | **164** | **169** | **172** | **175** | **181** | **183** |

Notes: Index set to 100 for 1999.
Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Enrolment of International Students (YoY Growth, by Sector)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Secondary or less | 14.2% | 13.1% | 2.8% | -3.0% | -2.7% | -0.8% | 6.6% | 6.2% | -0.4% |
| Trade | 29.3% | 21.9% | 13.5% | 8.1% | 1.9% | -3.9% | -5.1% | -1.6% | -16.0% |
| University | 16.3% | 19.6% | 14.7% | 11.2% | 9.4% | 3.7% | 1.6% | 2.7% | -0.7% |
| Other post-secondary | 23.0% | 40.7% | 13.4% | 8.9% | -12.6% | 2.1% | 4.8% | 14.3% | 34.6% |
| Other | 5.3% | 16.5% | -10.3% | -15.3% | -1.9% | 0.1% | 0.3% | -5.8% | 12.0% |
| **Total** | **17.2%** | **19.8%** | **10.1%** | **6.1%** | **3.2%** | **1.4%** | **1.8%** | **3.5%** | **1.2%** |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students in all Sectors (Total, Top 25 Source Countries)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| Korea | 6,810 | 11,204 | 14,054 | 14,843 | 13,972 | 13,456 | 13,819 | 15,597 | 15,169 | 13,941 |
| China | 4,339 | 6,687 | 11,446 | 11,814 | 10,140 | 7,462 | 7,434 | 8,988 | 10,032 | 13,668 |
| France | 4,321 | 4,483 | 4,614 | 4,067 | 3,955 | 4,237 | 4,411 | 5,125 | 4,816 | 4,675 |
| USA | 6,019 | 6,537 | 6,542 | 5,785 | 5,609 | 5,648 | 5,582 | 5,300 | 5,185 | 4,553 |
| Japan | 6,397 | 6,338 | 7,279 | 6,758 | 6,021 | 5,712 | 5,518 | 4,814 | 4,308 | 3,630 |
| Saudi Arabia | 195 | 237 | 296 | 351 | 565 | 643 | 839 | 822 | 1,427 | 3,521 |
| India | 730 | 912 | 1,288 | 2,138 | 2,492 | 1,823 | 2,256 | 2,747 | 2,694 | 3,244 |
| Mexico | 3,237 | 4,338 | 5,079 | 3,910 | 2,382 | 2,388 | 2,617 | 2,715 | 2,643 | 2,585 |
| Germany | 1,697 | 2,036 | 2,086 | 1,964 | 1,766 | 1,903 | 2,035 | 2,096 | 2,343 | 2,511 |
| Brazil | 1,401 | 1,694 | 1,864 | 1,360 | 687 | 835 | 975 | 1,203 | 1,428 | 1,746 |
| UK | 1,465 | 1,457 | 1,601 | 1,259 | 1,217 | 1,392 | 1,448 | 1,521 | 1,697 | 1,601 |
| Taiwan | 2,220 | 2,557 | 2,386 | 2,440 | 1,860 | 2,130 | 2,135 | 2,054 | 1,869 | 1,594 |
| Hong Kong | 1,808 | 1,851 | 1,920 | 1,873 | 1,650 | 1,657 | 1,432 | 1,224 | 1,148 | 1,120 |
| Morocco | 595 | 588 | 629 | 556 | 572 | 561 | 652 | 738 | 847 | 939 |
| Iran | 213 | 244 | 327 | 453 | 625 | 822 | 859 | 532 | 639 | 770 |
| Turkey | 322 | 486 | 513 | 527 | 479 | 560 | 661 | 685 | 697 | 717 |
| Russia | 375 | 361 | 370 | 323 | 294 | 346 | 411 | 448 | 547 | 705 |
| UAE | 284 | 372 | 443 | 478 | 498 | 546 | 565 | 469 | 555 | 679 |
| Tunisia | 390 | 509 | 689 | 593 | 519 | 499 | 498 | 504 | 523 | 625 |
| Vietnam | 194 | 329 | 424 | 524 | 813 | 391 | 346 | 243 | 252 | 593 |
| Nigeria | 153 | 217 | 171 | 175 | 424 | 405 | 445 | 334 | 492 | 536 |
| Pakistan | 643 | 439 | 438 | 308 | 335 | 342 | 355 | 444 | 396 | 503 |
| Australia | 828 | 882 | 977 | 783 | 628 | 561 | 590 | 560 | 569 | 492 |
| Malaysia | 333 | 275 | 331 | 320 | 361 | 287 | 347 | 324 | 339 | 488 |
| Thailand | 408 | 452 | 497 | 582 | 554 | 590 | 547 | 527 | 476 | 482 |
| **Top 25** | **45,377** | **55,485** | **66,264** | **64,184** | **58,418** | **55,196** | **56,777** | **60,014** | **61,091** | **65,918** |
| Other Countries | 12,802 | 13,333 | 14,282 | 12,467 | 10,932 | 10,589 | 10,787 | 11,285 | 12,389 | 12,909 |
| Country not stated | 246 | 286 | 373 | 297 | 362 | 336 | 313 | 487 | 558 | 682 |
| **Total Entries** | **58,425** | **69,104** | **80,919** | **76,948** | **69,712** | **66,121** | **67,877** | **71,786** | **74,038** | **79,509** |
| Total Entries (excl. Korea) | 54,086 | 62,417 | 69,473 | 65,134 | 59,572 | 58,659 | 60,443 | 62,798 | 64,006 | 65,841 |
| Total Entries (excl. China, Korea) | 47,276 | 51,213 | 55,419 | 50,291 | 45,600 | 45,203 | 46,624 | 47,201 | 48,837 | 51,900 |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students in all Sectors (Share, Top 25 Source Countries)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| Korea | 11.7% | 16.2% | 17.4% | 19.3% | 20.0% | 20.4% | 20.4% | 21.7% | 20.5% | 17.5% |
| China | 7.4% | 9.7% | 14.1% | 15.4% | 14.5% | 11.3% | 11.0% | 12.5% | 13.5% | 17.2% |
| France | 7.4% | 6.5% | 5.7% | 5.3% | 5.7% | 6.4% | 6.5% | 7.1% | 6.5% | 5.9% |
| USA | 10.3% | 9.5% | 8.1% | 7.5% | 8.0% | 8.5% | 8.2% | 7.4% | 7.0% | 5.7% |
| Japan | 10.9% | 9.2% | 9.0% | 8.8% | 8.6% | 8.6% | 8.1% | 6.7% | 5.8% | 4.6% |
| Saudi Arabia | 0.3% | 0.3% | 0.4% | 0.5% | 0.8% | 1.0% | 1.2% | 1.1% | 1.9% | 4.4% |
| India | 1.2% | 1.3% | 1.6% | 2.8% | 3.6% | 2.8% | 3.3% | 3.8% | 3.6% | 4.1% |
| Mexico | 5.5% | 6.3% | 6.3% | 5.1% | 3.4% | 3.6% | 3.9% | 3.8% | 3.6% | 3.3% |
| Germany | 2.9% | 2.9% | 2.6% | 2.6% | 2.5% | 2.9% | 3.0% | 2.9% | 3.2% | 3.2% |
| Brazil | 2.4% | 2.5% | 2.3% | 1.8% | 1.0% | 1.3% | 1.4% | 1.7% | 1.9% | 2.2% |
| UK | 2.5% | 2.1% | 2.0% | 1.6% | 1.7% | 2.1% | 2.1% | 2.1% | 2.3% | 2.0% |
| Taiwan | 3.8% | 3.7% | 2.9% | 3.2% | 2.7% | 3.2% | 3.1% | 2.9% | 2.5% | 2.0% |
| Hong Kong | 3.1% | 2.7% | 2.4% | 2.4% | 2.4% | 2.5% | 2.1% | 1.7% | 1.6% | 1.4% |
| Morocco | 1.0% | 0.9% | 0.8% | 0.7% | 0.8% | 0.8% | 1.0% | 1.0% | 1.1% | 1.2% |
| Iran | 0.4% | 0.4% | 0.4% | 0.6% | 0.9% | 1.2% | 1.3% | 0.7% | 0.9% | 1.0% |
| Turkey | 0.6% | 0.7% | 0.6% | 0.7% | 0.7% | 0.8% | 1.0% | 1.0% | 0.9% | 0.9% |
| Russia | 0.6% | 0.5% | 0.5% | 0.4% | 0.4% | 0.5% | 0.6% | 0.6% | 0.7% | 0.9% |
| UAE | 0.5% | 0.5% | 0.5% | 0.6% | 0.7% | 0.8% | 0.8% | 0.7% | 0.7% | 0.9% |
| Tunisia | 0.7% | 0.7% | 0.9% | 0.8% | 0.7% | 0.8% | 0.7% | 0.7% | 0.7% | 0.8% |
| Vietnam | 0.3% | 0.5% | 0.5% | 0.7% | 1.2% | 0.6% | 0.5% | 0.3% | 0.3% | 0.7% |
| Nigeria | 0.3% | 0.3% | 0.2% | 0.2% | 0.6% | 0.6% | 0.7% | 0.5% | 0.7% | 0.7% |
| Pakistan | 1.1% | 0.6% | 0.5% | 0.4% | 0.5% | 0.5% | 0.5% | 0.6% | 0.5% | 0.6% |
| Australia | 1.4% | 1.3% | 1.2% | 1.0% | 0.9% | 0.8% | 0.9% | 0.8% | 0.8% | 0.6% |
| Malaysia | 0.6% | 0.4% | 0.4% | 0.4% | 0.5% | 0.4% | 0.5% | 0.5% | 0.5% | 0.6% |
| Thailand | 0.7% | 0.7% | 0.6% | 0.8% | 0.8% | 0.9% | 0.8% | 0.7% | 0.6% | 0.6% |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students in all Sectors (Index, Top 25 Source Countries)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| Saudi Arabia | 100 | 122 | 152 | 180 | 290 | 330 | 430 | 422 | 732 | 1,806 |
| India | 100 | 125 | 176 | 293 | 341 | 250 | 309 | 376 | 369 | 444 |
| Iran | 100 | 115 | 154 | 213 | 293 | 386 | 403 | 250 | 300 | 362 |
| Nigeria | 100 | 142 | 112 | 114 | 277 | 265 | 291 | 218 | 322 | 350 |
| China | 100 | 154 | 264 | 272 | 234 | 172 | 171 | 207 | 231 | 315 |
| Vietnam | 100 | 170 | 219 | 270 | 419 | 202 | 178 | 125 | 130 | 306 |
| UAE | 100 | 131 | 156 | 168 | 175 | 192 | 199 | 165 | 195 | 239 |
| Turkey | 100 | 151 | 159 | 164 | 149 | 174 | 205 | 213 | 216 | 223 |
| Korea | 100 | 165 | 206 | 218 | 205 | 198 | 203 | 229 | 223 | 205 |
| Russia | 100 | 96 | 99 | 86 | 78 | 92 | 110 | 119 | 146 | 188 |
| Tunisia | 100 | 131 | 177 | 152 | 133 | 128 | 128 | 129 | 134 | 160 |
| Morocco | 100 | 99 | 106 | 93 | 96 | 94 | 110 | 124 | 142 | 158 |
| Germany | 100 | 120 | 123 | 116 | 104 | 112 | 120 | 124 | 138 | 148 |
| Malaysia | 100 | 83 | 99 | 96 | 108 | 86 | 104 | 97 | 102 | 147 |
| Brazil | 100 | 121 | 133 | 97 | 49 | 60 | 70 | 86 | 102 | 125 |
| Thailand | 100 | 111 | 122 | 143 | 136 | 145 | 134 | 129 | 117 | 118 |
| UK | 100 | 99 | 109 | 86 | 83 | 95 | 99 | 104 | 116 | 109 |
| France | 100 | 104 | 107 | 94 | 92 | 98 | 102 | 119 | 111 | 108 |
| Mexico | 100 | 134 | 157 | 121 | 74 | 74 | 81 | 84 | 82 | 80 |
| Pakistan | 100 | 68 | 68 | 48 | 52 | 53 | 55 | 69 | 62 | 78 |
| USA | 100 | 109 | 109 | 96 | 93 | 94 | 93 | 88 | 86 | 76 |
| Taiwan | 100 | 115 | 107 | 110 | 84 | 96 | 96 | 93 | 84 | 72 |
| Hong Kong | 100 | 102 | 106 | 104 | 91 | 92 | 79 | 68 | 63 | 62 |
| Australia | 100 | 107 | 118 | 95 | 76 | 68 | 71 | 68 | 69 | 59 |
| Japan | 100 | 99 | 114 | 106 | 94 | 89 | 86 | 75 | 67 | 57 |

Notes: Index set to 100 for 1999.
Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students in all Sectors (YoY Growth, Top 25 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Saudi Arabia | 21.5% | 24.9% | 18.6% | 61.0% | 13.8% | 30.5% | -2.0% | 73.6% | 146.7% |
| Vietnam | 69.6% | 28.9% | 23.6% | 55.2% | -51.9% | -11.5% | -29.8% | 3.7% | 135.3% |
| Malaysia | -17.4% | 20.4% | -3.3% | 12.8% | -20.5% | 20.9% | -6.6% | 4.6% | 44.0% |
| China | 54.1% | 71.2% | 3.2% | -14.2% | -26.4% | -0.4% | 20.9% | 11.6% | 36.2% |
| Russia | -3.7% | 2.5% | -12.7% | -9.0% | 17.7% | 18.8% | 9.0% | 22.1% | 28.9% |
| Pakistan | -31.7% | -0.2% | -29.7% | 8.8% | 2.1% | 3.8% | 25.1% | -10.8% | 27.0% |
| UAE | 31.0% | 19.1% | 7.9% | 4.2% | 9.6% | 3.5% | -17.0% | 18.3% | 22.3% |
| Brazil | 20.9% | 10.0% | -27.0% | -49.5% | 21.5% | 16.8% | 23.4% | 18.7% | 22.3% |
| Iran | 14.6% | 34.0% | 38.5% | 38.0% | 31.5% | 4.5% | -38.1% | 20.1% | 20.5% |
| India | 24.9% | 41.2% | 66.0% | 16.6% | -26.8% | 23.8% | 21.8% | -1.9% | 20.4% |
| Tunisia | 30.5% | 35.4% | -13.9% | -12.5% | -3.9% | -0.2% | 1.2% | 3.8% | 19.5% |
| Morocco | -1.2% | 7.0% | -11.6% | 2.9% | -1.9% | 16.2% | 13.2% | 14.8% | 10.9% |
| Nigeria | 41.8% | -21.2% | 2.3% | 142.3% | -4.5% | 9.9% | -24.9% | 47.3% | 8.9% |
| Germany | 20.0% | 2.5% | -5.8% | -10.1% | 7.8% | 6.9% | 3.0% | 11.8% | 7.2% |
| Turkey | 50.9% | 5.6% | 2.7% | -9.1% | 16.9% | 18.0% | 3.6% | 1.8% | 2.9% |
| Thailand | 10.8% | 10.0% | 17.1% | -4.8% | 6.5% | -7.3% | -3.7% | -9.7% | 1.3% |
| Mexico | 34.0% | 17.1% | -23.0% | -39.1% | 0.3% | 9.6% | 3.7% | -2.7% | -2.2% |
| Hong Kong | 2.4% | 3.7% | -2.4% | -11.9% | 0.4% | -13.6% | -14.5% | -6.2% | -2.4% |
| France | 3.7% | 2.9% | -11.9% | -2.8% | 7.1% | 4.1% | 16.2% | -6.0% | -2.9% |
| UK | -0.5% | 9.9% | -21.4% | -3.3% | 14.4% | 4.0% | 5.0% | 11.6% | -5.7% |
| Korea | 64.5% | 25.4% | 5.6% | -5.9% | -3.7% | 2.7% | 12.9% | -2.7% | -8.1% |
| USA | 8.6% | 0.1% | -11.6% | -3.0% | 0.7% | -1.2% | -5.1% | -2.2% | -12.2% |
| Australia | 6.5% | 10.8% | -19.9% | -19.8% | -10.7% | 5.2% | -5.1% | 1.6% | -13.5% |
| Taiwan | 15.2% | -6.7% | 2.3% | -23.8% | 14.5% | 0.2% | -3.8% | -9.0% | -14.7% |
| Japan | -0.9% | 14.8% | -7.2% | -10.9% | -5.1% | -3.4% | -12.8% | -10.5% | -15.7% |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students in all Sectors (YoY Growth, Top 25 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Korea | 64.5% | 25.4% | 5.6% | -5.9% | -3.7% | 2.7% | 12.9% | -2.7% | -8.1% |
| China | 54.1% | 71.2% | 3.2% | -14.2% | -26.4% | -0.4% | 20.9% | 11.6% | 36.2% |
| France | 3.7% | 2.9% | -11.9% | -2.8% | 7.1% | 4.1% | 16.2% | -6.0% | -2.9% |
| USA | 8.6% | 0.1% | -11.6% | -3.0% | 0.7% | -1.2% | -5.1% | -2.2% | -12.2% |
| Japan | -0.9% | 14.8% | -7.2% | -10.9% | -5.1% | -3.4% | -12.8% | -10.5% | -15.7% |
| Saudi Arabia | 21.5% | 24.9% | 18.6% | 61.0% | 13.8% | 30.5% | -2.0% | 73.6% | 146.7% |
| India | 24.9% | 41.2% | 66.0% | 16.6% | -26.8% | 23.8% | 21.8% | -1.9% | 20.4% |
| Mexico | 34.0% | 17.1% | -23.0% | -39.1% | 0.3% | 9.6% | 3.7% | -2.7% | -2.2% |
| Germany | 20.0% | 2.5% | -5.8% | -10.1% | 7.8% | 6.9% | 3.0% | 11.8% | 7.2% |
| Brazil | 20.9% | 10.0% | -27.0% | -49.5% | 21.5% | 16.8% | 23.4% | 18.7% | 22.3% |
| UK | -0.5% | 9.9% | -21.4% | -3.3% | 14.4% | 4.0% | 5.0% | 11.6% | -5.7% |
| Taiwan | 15.2% | -6.7% | 2.3% | -23.8% | 14.5% | 0.2% | -3.8% | -9.0% | -14.7% |
| Hong Kong | 2.4% | 3.7% | -2.4% | -11.9% | 0.4% | -13.6% | -14.5% | -6.2% | -2.4% |
| Morocco | -1.2% | 7.0% | -11.6% | 2.9% | -1.9% | 16.2% | 13.2% | 14.8% | 10.9% |
| Iran | 14.6% | 34.0% | 38.5% | 38.0% | 31.5% | 4.5% | -38.1% | 20.1% | 20.5% |
| Turkey | 50.9% | 5.6% | 2.7% | -9.1% | 16.9% | 18.0% | 3.6% | 1.8% | 2.9% |
| Russia | -3.7% | 2.5% | -12.7% | -9.0% | 17.7% | 18.8% | 9.0% | 22.1% | 28.9% |
| UAE | 31.0% | 19.1% | 7.9% | 4.2% | 9.6% | 3.5% | -17.0% | 18.3% | 22.3% |
| Tunisia | 30.5% | 35.4% | -13.9% | -12.5% | -3.9% | -0.2% | 1.2% | 3.8% | 19.5% |
| Vietnam | 69.6% | 28.9% | 23.6% | 55.2% | -51.9% | -11.5% | -29.8% | 3.7% | 135.3% |
| Nigeria | 41.8% | -21.2% | 2.3% | 142.3% | -4.5% | 9.9% | -24.9% | 47.3% | 8.9% |
| Pakistan | -31.7% | -0.2% | -29.7% | 8.8% | 2.1% | 3.8% | 25.1% | -10.8% | 27.0% |
| Australia | 6.5% | 10.8% | -19.9% | -19.8% | -10.7% | 5.2% | -5.1% | 1.6% | -13.5% |
| Malaysia | -17.4% | 20.4% | -3.3% | 12.8% | -20.5% | 20.9% | -6.6% | 4.6% | 44.0% |
| Thailand | 10.8% | 10.0% | 17.1% | -4.8% | 6.5% | -7.3% | -3.7% | -9.7% | 1.3% |
| | | | | | | | | | |
| **Total Entries** | **18.3%** | **17.1%** | **-4.9%** | **-9.4%** | **-5.2%** | **2.7%** | **5.8%** | **3.1%** | **7.4%** |
| Total Entries (excl. China) | 15.4% | 11.3% | -6.2% | -8.5% | -1.5% | 3.0% | 3.9% | 1.9% | 2.9% |
| Total Entries (excl. China, Korea) | 8.3% | 8.2% | -9.3% | -9.3% | -0.9% | 3.1% | 1.2% | 3.5% | 6.3% |

Notes: Sorted by total entry figures.
Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students (Total, by Sector and Gender)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Male** | | | | | | | | | | |
| Secondary or less | 7,015 | 8,898 | 9,733 | 8,956 | 8,090 | 8,389 | 8,757 | 9,867 | 10,088 | 10,207 |
| Trade | 4,637 | 5,831 | 6,656 | 6,461 | 5,906 | 5,361 | 5,334 | 5,291 | 5,266 | 4,498 |
| University | 12,119 | 13,476 | 15,895 | 15,831 | 15,287 | 15,063 | 15,444 | 15,696 | 16,331 | 17,599 |
| Other post-secondary | 2,651 | 3,345 | 4,941 | 4,828 | 4,533 | 3,442 | 4,074 | 4,556 | 5,481 | 8,088 |
| Other | 3,177 | 3,220 | 3,968 | 3,334 | 2,576 | 2,436 | 2,431 | 2,415 | 2,340 | 2,954 |
| Level not stated | 78 | 82 | 45 | 44 | 11 | 11 | 4 | 11 | 8 | 11 |
| **Total male** | **29,677** | **34,852** | **41,238** | **39,454** | **36,403** | **34,702** | **36,044** | **37,836** | **39,514** | **43,357** |
| | | | | | | | | | | |
| **Female** | | | | | | | | | | |
| Secondary or less | 6,991 | 8,461 | 9,289 | 8,413 | 7,857 | 7,538 | 8,053 | 9,024 | 9,425 | 9,624 |
| Trade | 4,434 | 5,718 | 6,502 | 6,334 | 5,689 | 5,042 | 4,792 | 51,43 | 4,944 | 4,487 |
| University | 10,853 | 12,803 | 14,529 | 14,147 | 12,875 | 12,981 | 13,011 | 13,697 | 13,600 | 13,767 |
| Other post-secondary | 2,631 | 3,244 | 4,456 | 4,442 | 3,953 | 2,938 | 3,142 | 3,260 | 3,880 | 5,555 |
| Other | 3,776 | 3,935 | 4,863 | 4,135 | 2,928 | 2,916 | 2,829 | 2,815 | 2,670 | 2,709 |
| Level not stated | 50 | 58 | 30 | 16 | 4 | 2 | 2 | 5 | 3 | 6 |
| **Total female** | **28,735** | **34,219** | **39,669** | **37,487** | **33,306** | **31,417** | **31,829** | **33,944** | **34,522** | **36,148** |
| | | | | | | | | | | |
| **Gender not stated** | | | | | | | | | | |
| Secondary or less | 8 | 9 | 5 | 2 | 0 | 0 | 1 | 0 | 0 | 1 |
| Trade | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 0 |
| University | 4 | 14 | 4 | 2 | 3 | 2 | 2 | 4 | 2 | 2 |
| Other post-secondary | 0 | 4 | 1 | 1 | 0 | 0 | 1 | 0 | 0 | 1 |
| Other | 1 | 6 | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 0 |
| Level not stated | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total gender not stated** | **13** | **33** | **12** | **7** | **3** | **2** | **4** | **6** | **2** | **4** |
| | | | | | | | | | | |
| **Total** | | | | | | | | | | |
| Secondary or less | 14,014 | 17,368 | 19,027 | 17,371 | 15,947 | 15,927 | 16,811 | 18,891 | 19,513 | 19,832 |
| Trade | 9,071 | 11,549 | 13,158 | 12,795 | 11,595 | 10,403 | 10,126 | 10,436 | 10,210 | 8,985 |
| University | 22,976 | 26,293 | 30,428 | 29,980 | 28,165 | 28,046 | 28,457 | 29,397 | 29,933 | 31,368 |
| Other post-secondary | 5,282 | 6,593 | 9,398 | 9,271 | 8,486 | 6,380 | 7,217 | 7,816 | 9,361 | 13,644 |
| Other | 7,082 | 7,301 | 8,908 | 7,531 | 5,519 | 5,365 | 5,266 | 5,246 | 5,021 | 5,680 |
| **Grand total** | **58,425** | **69,104** | **80,919** | **76,948** | **69,712** | **66,121** | **67,877** | **71,786** | **74,038** | **79,509** |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students (Index, by Sector)

| | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|---|
| Secondary or less | 100 | 124 | 136 | 124 | 114 | 114 | 120 | 135 | 139 | 142 |
| Trade | 100 | 127 | 145 | 141 | 128 | 115 | 112 | 115 | 113 | 99 |
| University | 100 | 114 | 132 | 130 | 123 | 122 | 124 | 128 | 130 | 137 |
| Other post-secondary | 100 | 125 | 178 | 176 | 161 | 121 | 137 | 148 | 177 | 258 |
| Other | 100 | 103 | 126 | 106 | 78 | 76 | 74 | 74 | 71 | 80 |
| **Total** | **100** | **118** | **139** | **132** | **119** | **113** | **116** | **123** | **127** | **136** |

Notes: Index set to 100 for 1999.
Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

## Entry of International Students (YoY Growth, by Sector)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Secondary or less | 19.3% | 8.7% | -9.5% | -8.9% | -0.1% | 5.3% | 11.0% | 3.2% | 1.6% |
| Trade | 21.5% | 12.2% | -2.8% | -10.3% | -11.5% | -2.7% | 3.0% | -2.2% | -13.6% |
| University | 12.6% | 13.6% | -1.5% | -6.4% | -0.4% | 1.4% | 3.2% | 1.8% | 4.6% |
| Other post-secondary | 19.9% | 29.8% | -1.4% | -9.3% | -33.0% | 11.6% | 7.7% | 16.5% | 31.4% |
| Other | 3.0% | 18.0% | -18.3% | -36.5% | -2.9% | -1.9% | -0.4% | -4.5% | 11.6% |
| **Total** | **15.5%** | **14.6%** | **-5.2%** | **-10.4%** | **-5.4%** | **2.6%** | **5.4%** | **3.0%** | **6.9%** |

Source: Citizenship & Immigration Canada, RDM, Facts and Figures, 2008.

# France

## Higher Education Enrolment (Total, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Morocco | 21,048 | 24,284 | 29,504 | 34,826 | 32,802 | 29,859 | 29,299 | 27,684 | 21,710 |
| China | 2,111 | 3,068 | 5,477 | 10,665 | 11,514 | 14,316 | 17,132 | 18,836 | 20,160 |
| Algeria | 13,539 | 12,572 | 14,056 | 18,432 | 22,250 | 22,228 | 21,641 | 20,125 | 18,814 |
| Tunisia | 6,268 | 6,921 | 7,843 | 9,409 | 9,748 | 9,750 | 10,386 | 10,533 | 10,144 |
| Senegal | 4,079 | 5,114 | 6,123 | 7,978 | 8,329 | 8,766 | 9,399 | 9,302 | 8,255 |
| Germany | 5,436 | 5,287 | 5,276 | 6,908 | 6,698 | 5,887 | 6,565 | 6,947 | 6,163 |
| Cameroon | 3,279 | 3,315 | 3,563 | 4,612 | 4,963 | 5,043 | 5,387 | 5,570 | 5,100 |
| Vietnam | 1,226 | 1,445 | 1,548 | 2,404 | 2,950 | 3,735 | 4,658 | 5,164 | 5,031 |
| Italy | 3,950 | 3,722 | 3,813 | 4,740 | 4,686 | 4,021 | 4,455 | 4,790 | 4,784 |
| Lebanon | 2,500 | 2,798 | 3,219 | 4,420 | 4,671 | 4,695 | 5,083 | 5,391 | 4,406 |
| **Total Enrolment** | **160,533** | **174,080** | **196,748** | **221,471** | **244,335** | **255,585** | **265,710** | **263,094** | **260,596** |

Sources: Data for 2000-2006 are sourced from CampusFrance *International Student Mobility, Key Figures 2008*. Data for 2007 are sourced from OECD *Education at a Glance 2009* and the Ministère de l'enseignement supérieur et de la recherche. Data for 2008 are sourced from the Ministère de l'enseignement supérieur et de la recherché.

## Higher Education Enrolment (Share, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|---|---|---|---|---|---|---|---|---|
| Morocco | 13.1% | 13.9% | 15.0% | 15.7% | 13.4% | 11.7% | 11.0% | 10.5% |
| China | 1.3% | 1.8% | 2.8% | 4.8% | 4.7% | 5.6% | 6.4% | 7.2% |
| Algeria | 8.4% | 7.2% | 7.1% | 8.3% | 9.1% | 8.7% | 8.1% | 7.6% |
| Tunisia | 3.9% | 4.0% | 4.0% | 4.2% | 4.0% | 3.8% | 3.9% | 4.0% |
| Senegal | 2.5% | 2.9% | 3.1% | 3.6% | 3.4% | 3.4% | 3.5% | 3.5% |
| Germany | 3.4% | 3.0% | 2.7% | 3.1% | 2.7% | 2.3% | 2.5% | 2.6% |
| Cameroon | 2.0% | 1.9% | 1.8% | 2.1% | 2.0% | 2.0% | 2.0% | 2.1% |
| Vietnam | 0.8% | 0.8% | 0.8% | 1.1% | 1.2% | 1.5% | 1.8% | 2.0% |
| Italy | 2.5% | 2.1% | 1.9% | 2.1% | 1.9% | 1.6% | 1.7% | 1.8% |
| Lebanon | 1.6% | 1.6% | 1.6% | 2.0% | 1.9% | 1.8% | 1.9% | 2.0% |
| **Total Enrolment** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

Sources: Data for 2000-2006 are sourced from CampusFrance *International Student Mobility, Key Figures 2008*. Data for 2007 are sourced from OECD *Education at a Glance 2009* and the Ministère de l'enseignement supérieur et de la recherche. Data for 2008 are sourced from the Ministère de l'enseignement supérieur et de la recherché.

## Higher Education Enrolment (Index, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Morocco | 100 | 115 | 140 | 165 | 156 | 142 | 139 | 132 | 103 |
| China | 100 | 145 | 259 | 505 | 545 | 678 | 812 | 892 | 955 |
| Algeria | 100 | 93 | 104 | 136 | 164 | 164 | 160 | 149 | 139 |
| Tunisia | 100 | 110 | 125 | 150 | 156 | 156 | 166 | 168 | 162 |
| Senegal | 100 | 125 | 150 | 196 | 204 | 215 | 230 | 228 | 202 |
| Germany | 100 | 97 | 97 | 127 | 123 | 108 | 121 | 128 | 113 |
| Cameroon | 100 | 101 | 109 | 141 | 151 | 154 | 164 | 170 | 156 |
| Vietnam | 100 | 118 | 126 | 196 | 241 | 305 | 380 | 421 | 410 |
| Italy | 100 | 94 | 97 | 120 | 119 | 102 | 113 | 121 | 121 |
| Lebanon | 100 | 112 | 129 | 177 | 187 | 188 | 203 | 216 | 176 |
| **Total Enrolment** | **100** | **108** | **123** | **138** | **152** | **159** | **166** | **164** | **162** |

Sources: Data for 2000-2006 are sourced from CampusFrance *International Student Mobility, Key Figures 2008*. Data for 2007 are sourced from OECD *Education at a Glance 2009* and the Ministère de l'enseignement supérieur et de la recherche. Data for 2008 are sourced from the Ministère de l'enseignement supérieur et de la recherché.

## Higher Education Enrolment (YoY Growth, Top 10 Source Countries)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 |
|---|---|---|---|---|---|---|---|
| Morocco | 15.4% | 21.5% | 18.0% | -5.8% | -9.0% | -1.9% | -5.5% |
| China | 45.3% | 78.5% | 94.7% | 8.0% | 24.3% | 19.7% | 9.9% |
| Algeria | -7.1% | 11.8% | 31.1% | 20.7% | -0.1% | -2.6% | -7.0% |
| Tunisia | 10.4% | 13.3% | 20.0% | 3.6% | 0.0% | 6.5% | 1.4% |
| Senegal | 25.4% | 19.7% | 30.3% | 4.4% | 5.2% | 7.2% | -1.0% |
| Germany | -2.7% | -0.2% | 30.9% | -3.0% | -12.1% | 11.5% | 5.8% |
| Cameroon | 1.1% | 7.5% | 29.4% | 7.6% | 1.6% | 6.8% | 3.4% |
| Vietnam | 17.9% | 7.1% | 55.3% | 22.7% | 26.6% | 24.7% | 10.9% |
| Italy | -5.8% | 2.4% | 24.3% | -1.1% | -14.2% | 10.8% | 7.5% |
| Lebanon | 11.9% | 15.0% | 37.3% | 5.7% | 0.5% | 8.3% | 6.1% |
| **Total Enrolment** | **8.4%** | **13.0%** | **12.6%** | **10.3%** | **4.6%** | **4.0%** | **-1.0%** |

Sources: Data for 2000-2006 are sourced from CampusFrance *International Student Mobility, Key Figures 2008*. Data for 2007 are sourced from OECD *Education at a Glance 2009* and the Ministère de l'enseignement supérieur et de la recherche. Data for 2008 are sourced from the Ministère de l'enseignement supérieur et de la recherché.

## Key Organizational Statistics: Agence CampusFrance

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount (headquarter) | 36 |
| **Total staff headcount (headquarter only)** | **36** |
| | |
| **Number of offices** | |
| In France (headquarter) | 1 |
| Outside France (Espace CampusFrance (ECFs)) | 108 |
| **Total number of offices** | **109** |
| | |
| **Expenses** | |
| Salaries | EUR 2,065,000 |
| Other | EUR 1,062,000 |
| Events outside the European Union | EUR 1,003,000 |
| Operating costs | EUR 708,000 |
| CampusFrance networks and Malaysia program | EUR 590,000 |
| Contributions and costs of ECFs | EUR 472,000 |
| **Total expenses** | **EUR 5,900,000** |
| | |
| **Funding** | |
| Government subsidies | EUR 3,500,000 |
| Other | EUR 980,000 |
| Member establishments' contributions | EUR 959,000 |
| European Commission contracts | EUR 461,000 |
| **Total funding** | **EUR 5,900,000** |

Notes: Staff headcount figure indicates staff at the head office in Paris; ECF staff members are paid by the French embassies under which they operate (there are one to three staff members at each ECF). Budget figures are for 2008.
Sources: CampusFrance Activity Report, CampusFrance website, and correspondence with CampusFrance.

# Germany

### Higher Education Enrolment (Total, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 6,256 | 9,109 | 14,070 | 20,141 | 25,284 | 27,129 | 27,390 | 27,117 | 25,479 |
| Turkey | 23,762 | 23,640 | 24,041 | 24,114 | 24,448 | 22,553 | 22,419 | 22,090 | 21,404 |
| Poland | 8,181 | 9,328 | 10,936 | 12,601 | 14,350 | 14,896 | 15,183 | 14,493 | 13,028 |
| Russia | 5,946 | 6,987 | 8,383 | 9,601 | 10,814 | 11,479 | 11,953 | 12,197 | 11,847 |
| Bulgaria | 3,307 | 5,015 | 7,321 | 9,897 | 12,048 | 12,848 | 12,794 | 12,170 | 10,504 |
| Ukraine | 2,836 | 3,688 | 4,917 | 6,071 | 7,238 | 8,066 | 8,671 | 8,839 | 8,408 |
| Morocco | 5,699 | 6,204 | 6,765 | 7,421 | 8,097 | 8,019 | 8,213 | 7,931 | 6,918 |
| Italy | 6,547 | 6,771 | 6,879 | 7,074 | 7,183 | 6,810 | 6,701 | 6,614 | 6,512 |
| Austria | 6,106 | 6,127 | 6,422 | 6,389 | 6,373 | 5,770 | 5,930 | 6,153 | 6,018 |
| France | 6,204 | 6,246 | 6,356 | 6,245 | 6,431 | 6,290 | 6,074 | 5,982 | 5,476 |
| **Total Enrolment** | **175,065** | **187,027** | **206,141** | **227,026** | **246,136** | **246,334** | **248,357** | **246,369** | **233,606** |

Notes: Enrolment figures include Bildungsinländer and Bildungsausländer.
Source: DAAD/HIS Wissenschaft Weltoffen, 2009.

### Higher Education Enrolment (Share, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 3.6% | 4.9% | 6.8% | 8.9% | 10.3% | 11.0% | 11.0% | 11.0% | 10.9% |
| Turkey | 13.6% | 12.6% | 11.7% | 10.6% | 9.9% | 9.2% | 9.0% | 9.0% | 9.2% |
| Poland | 4.7% | 5.0% | 5.3% | 5.6% | 5.8% | 6.0% | 6.1% | 5.9% | 5.6% |
| Russia | 3.4% | 3.7% | 4.1% | 4.2% | 4.4% | 4.7% | 4.8% | 5.0% | 5.1% |
| Bulgaria | 1.9% | 2.7% | 3.6% | 4.4% | 4.9% | 5.2% | 5.2% | 4.9% | 4.5% |
| Ukraine | 1.6% | 2.0% | 2.4% | 2.7% | 2.9% | 3.3% | 3.5% | 3.6% | 3.6% |
| Morocco | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | 3.3% | 3.2% | 3.0% |
| Italy | 3.7% | 3.6% | 3.3% | 3.1% | 2.9% | 2.8% | 2.7% | 2.7% | 2.8% |
| Austria | 3.5% | 3.3% | 3.1% | 2.8% | 2.6% | 2.3% | 2.4% | 2.5% | 2.6% |
| France | 3.5% | 3.3% | 3.1% | 2.8% | 2.6% | 2.6% | 2.4% | 2.4% | 2.3% |
| **Total Enrolment** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

Notes: Enrolment figures include Bildungsinländer and Bildungsausländer.
Source: DAAD/HIS Wissenschaft Weltoffen, 2009.

## Higher Education Enrolment (Index, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 100 | 146 | 225 | 322 | 404 | 434 | 438 | 433 | 407 |
| Turkey | 100 | 99 | 101 | 101 | 103 | 95 | 94 | 93 | 90 |
| Poland | 100 | 114 | 134 | 154 | 175 | 182 | 186 | 177 | 159 |
| Russia | 100 | 118 | 141 | 161 | 182 | 193 | 201 | 205 | 199 |
| Bulgaria | 100 | 152 | 221 | 299 | 364 | 389 | 387 | 368 | 318 |
| Ukraine | 100 | 130 | 173 | 214 | 255 | 284 | 306 | 312 | 296 |
| Morocco | 100 | 109 | 119 | 130 | 142 | 141 | 144 | 139 | 121 |
| Italy | 100 | 103 | 105 | 108 | 110 | 104 | 102 | 101 | 99 |
| Austria | 100 | 100 | 105 | 105 | 104 | 94 | 97 | 101 | 99 |
| France | 100 | 101 | 102 | 101 | 104 | 101 | 98 | 96 | 88 |
| **Total Enrolment** | **100** | **107** | **118** | **130** | **141** | **141** | **142** | **141** | **133** |

Notes: Enrolment figures include Bildungsinländer and Bildungsausländer. Index set to 100 for 2000.
Source: DAAD/HIS Wissenschaft Weltoffen, 2009.

## Higher Education Enrolment (YoY Growth, Top 10 Source Countries)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|
| China | 45.6% | 54.5% | 43.1% | 25.5% | 7.3% | 1.0% | -1.0% | -6.0% |
| Turkey | -0.5% | 1.7% | 0.3% | 1.4% | -7.8% | -0.6% | -1.5% | -3.1% |
| Poland | 14.0% | 17.2% | 15.2% | 13.9% | 3.8% | 1.9% | -4.5% | -10.1% |
| Russia | 17.5% | 20.0% | 14.5% | 12.6% | 6.1% | 4.1% | 2.0% | -2.9% |
| Bulgaria | 51.6% | 46.0% | 35.2% | 21.7% | 6.6% | -0.4% | -4.9% | -13.7% |
| Ukraine | 30.0% | 33.3% | 23.5% | 19.2% | 11.4% | 7.5% | 1.9% | -4.9% |
| Morocco | 8.9% | 9.0% | 9.7% | 9.1% | -1.0% | 2.4% | -3.4% | -12.8% |
| Italy | 3.4% | 1.6% | 2.8% | 1.5% | -5.2% | -1.6% | -1.3% | -1.5% |
| Austria | 0.3% | 4.8% | -0.5% | -0.3% | -9.5% | 2.8% | 3.8% | -2.2% |
| France | 0.7% | 1.8% | -1.7% | 3.0% | -2.2% | -3.4% | -1.5% | -8.5% |
| **Total Enrolment** | **6.8%** | **10.2%** | **10.1%** | **8.4%** | **0.1%** | **0.8%** | **-0.8%** | **-5.2%** |

Notes: Enrolment figures include Bildungsinländer and Bildungsausländer.
Source: DAAD/HIS Wissenschaft Weltoffen, 2009.

## Key Organizational Statistics: German Academic Exchange Service (DAAD)

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount (in Germany) | 271 |
| Staff on contract basis | 378 |
| **Total staff headcount** | **649** |
| | |
| **Number of offices** | |
| In Germany (including headquarter) | 2 |
| Outside Germany | 63 |
| **Total number of offices** | **65** |
| | |
| **Expenses** | |
| Grants and scholarships for Germans | EUR 84,000,000 |
| Grants and scholarships for foreigners | EUR 71,000,000 |
| Internationalization of German universities | EUR 60,000,000 |
| Educational cooperation with developing countries | EUR 51,000,000 |
| Promotion of German studies and language | EUR 38,000,000 |
| Salary and operating costs* | EUR 21,100,000 |
| **Total expenses** | **EUR 325,100,000** |
| | |
| **Funding** | |
| Federal Government | EUR 233,700,000 |
| European Union | EUR 50,600,000 |
| Federal International Office* | EUR 21,100,000 |
| Other sources | EUR 19,200,000 |
| Länder | EUR 400,000 |
| **Total funding** | **EUR 325,000,000** |

Notes: Number of offices figure includes two German offices, 14 International Branch/Regional Offices, and 49 Information Centres. Salary and operating costs (*) are covered by the German Federal International Offices as a separate line item; DAAD program expenses total EUR 304,000,000. Budget figures are for 2008.
Sources: DAAD Annual Report, DAAD website, and correspondence with DAAD.

# New Zealand

## Higher Education Enrolment (Total, by Geographic Region)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Africa | 147 | 221 | 274 | 341 | 320 | 297 | 314 | 402 | 472 |
| Asia | 9,368 | 15,059 | 23,647 | 30,557 | 33,491 | 30,865 | 26,519 | 23,183 | 21,735 |
| Central/South America | 150 | 195 | 247 | 268 | 291 | 317 | 332 | 397 | 357 |
| Europe | 1,093 | 1,568 | 2,078 | 2,610 | 2,954 | 3,174 | 3,318 | 3,434 | 3,491 |
| Middle East | 45 | 106 | 141 | 158 | 248 | 336 | 445 | 666 | 1,045 |
| Northern America | 831 | 1,125 | 1,495 | 2,062 | 2,646 | 2,857 | 2,800 | 2,784 | 2,833 |
| Pacific | 1,602 | 1,739 | 1,881 | 1,654 | 1,593 | 1,454 | 1,611 | 1,649 | 1,686 |
| **Total Enrolment** | **13,246** | **20,026** | **29,763** | **37,687** | **41,554** | **39,308** | **35,345** | **32,530** | **31,620** |

Notes: Owing to the lack of coherent times series data, only a regional breakdown could be presented. Data for 2000 is based on a data set which differs slightly from the 2001-08 data set.
Source: New Zealand Ministry of Education.

## Higher Education Enrolment (Share, by Geographic Region)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Africa | 1.1% | 1.1% | 0.9% | 0.9% | 0.8% | 0.8% | 0.9% | 1.2% | 1.5% |
| Asia | 70.7% | 75.2% | 79.5% | 81.1% | 80.6% | 78.5% | 75.0% | 71.3% | 68.7% |
| Central/South America | 1.1% | 1.0% | 0.8% | 0.7% | 0.7% | 0.8% | 0.9% | 1.2% | 1.1% |
| Europe | 8.3% | 7.8% | 7.0% | 6.9% | 7.1% | 8.1% | 9.4% | 10.6% | 11.0% |
| Middle East | 0.3% | 0.5% | 0.5% | 0.4% | 0.6% | 0.9% | 1.3% | 2.0% | 3.3% |
| Northern America | 6.3% | 5.6% | 5.0% | 5.5% | 6.4% | 7.3% | 7.9% | 8.6% | 9.0% |
| Pacific | 12.1% | 8.7% | 6.3% | 4.4% | 3.8% | 3.7% | 4.6% | 5.1% | 5.3% |
| **Total Enrolment** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

Notes: Owing to the lack of coherent times series data, only a regional breakdown could be presented. Data for 2000 is based on a data set which differs slightly from the 2001-08 data set.
Source: New Zealand Ministry of Education.

## Higher Education Enrolment (Index, by Geographic Region)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| Africa | 100 | 150 | 186 | 232 | 218 | 202 | 214 | 273 | 321 |
| Asia | 100 | 161 | 252 | 326 | 358 | 329 | 283 | 247 | 232 |
| Central/South America | 100 | 130 | 165 | 179 | 194 | 211 | 221 | 265 | 238 |
| Europe | 100 | 143 | 190 | 239 | 270 | 290 | 304 | 314 | 319 |
| Middle East | 100 | 236 | 313 | 351 | 551 | 747 | 989 | 1,480 | 2,322 |
| Northern America | 100 | 135 | 180 | 248 | 318 | 344 | 337 | 335 | 341 |
| Pacific | 100 | 109 | 117 | 103 | 99 | 91 | 101 | 103 | 105 |
| **Total Enrolment** | **100** | **151** | **225** | **285** | **314** | **297** | **267** | **246** | **239** |

Notes: Owing to the lack of coherent times series data, only a regional breakdown could be presented. Data for 2000 is based on a data set which differs slightly from the 2001-08 data set. Index is set to 100 for 2000.
Source: New Zealand Ministry of Education.

## Higher Education Enrolment (YoY Growth, Top 10 Source Countries)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|
| Africa | 50% | 24% | 24% | -6% | -7% | 6% | 28% | 17% |
| Asia | 61% | 57% | 29% | 10% | -8% | -14% | -13% | -6% |
| Central/South America | 30% | 27% | 9% | 9% | 9% | 5% | 20% | -10% |
| Europe | 43% | 33% | 26% | 13% | 7% | 5% | 3% | 2% |
| Middle East | 136% | 33% | 12% | 57% | 35% | 32% | 50% | 57% |
| Northern America | 35% | 33% | 38% | 28% | 8% | -2% | -1% | 2% |
| Pacific | 9% | 8% | -12% | -4% | -9% | 11% | 2% | 2% |
| **Total Enrolment** | **51%** | **49%** | **27%** | **10%** | **-5%** | **-10%** | **-8%** | **-3%** |

Notes: Owing to the lack of coherent times series data, only a regional breakdown could be presented. Data for 2000 is based on a data set which differs slightly from the 2001-08 data set.
Source: New Zealand Ministry of Education.

## Key Organizational Statistics: Education New Zealand (ENZ)

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount (in New Zealand) | 10 |
| Staff headcount (outside New Zealand) | 1 |
| **Total staff headcount** | **11** |
| | |
| **Number of offices** | |
| In New Zealand | 1 |
| Outside New Zealand | 1 |
| **Total number of offices** | **2** |
| | |
| **Expenses** | |
| Expenses | n/a |
| **Total expenses** | **n/a** |
| | |
| **Funding** | |
| Export Education Levy | NZD 2,872,197 |
| Other funding sources | n/a |
| **Total funding** | **n/a** |

Notes: Staff headcount figure includes ten staff in Wellington, and one in Bangkok; ENZ also has access to eight NZTE staff, each of whom are located at NZTE posts abroad, but they are paid by NZTE and not considered to be ENZ staff. Number of offices figure reflects wholly owned offices, and does not include ENZ's presence in the NZTE outposts. Annual funding is estimated to be in excess of NZD 3 million. ENZ's own budget, however, is not publicly available. Export Education Levy figure is for 2008.

Sources: ENZ website, ENZ statistics, and correspondence with ENZ.

# United Kingsom

## Higher Education Enrolment (Total, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 6,310 | 12,095 | 20,710 | 35,155 | 47,740 | 52,675 | 50,755 | 49,595 | 45,355 |
| India | 3,760 | 4,875 | 7,750 | 12,465 | 14,625 | 16,685 | 19,205 | 23,835 | 25,905 |
| Ireland | 13,930 | 13,510 | 13,235 | 13,460 | 14,715 | 16,345 | 16,790 | 16,255 | 15,260 |
| USA | 11,470 | 9,425 | 9,985 | 11,630 | 13,380 | 14,385 | 14,755 | 15,955 | 13,905 |
| Germany | 13,750 | 11,370 | 10,960 | 11,785 | 12,095 | 12,555 | 13,265 | 14,010 | 13,625 |
| France | 12,910 | 9,950 | 9,940 | 10,560 | 11,295 | 11,685 | 12,455 | 13,070 | 12,685 |
| Greece | 29,580 | 31,150 | 28,585 | 26,005 | 22,825 | 19,685 | 17,675 | 16,050 | 12,625 |
| Nigeria | 2,120 | 2,650 | 3,340 | 4,585 | 5,940 | 8,145 | 9,605 | 11,135 | 11,785 |
| Malaysia | 10,140 | 10,005 | 10,680 | 11,780 | 11,805 | 11,475 | 11,450 | 11,810 | 11,730 |
| Hong Kong | 8,380 | 8,335 | 8,870 | 10,105 | 10,575 | 10,780 | 9,445 | 9,640 | 9,700 |
| **Total Enrolment** | **224,660** | **230,870** | **242,755** | **275,275** | **298,050** | **318,395** | **307,040** | **325,985** | **341,795** |

Notes: See notes on data below.
Source: HESA.

## Higher Education Enrolment (Share, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 2.8% | 5.2% | 8.5% | 12.8% | 16.0% | 16.5% | 16.5% | 15.2% | 13.3% |
| India | 1.7% | 2.1% | 3.2% | 4.5% | 4.9% | 5.2% | 6.3% | 7.3% | 7.6% |
| Ireland | 6.2% | 5.9% | 5.5% | 4.9% | 4.9% | 5.1% | 5.5% | 5.0% | 4.5% |
| USA | 5.1% | 4.1% | 4.1% | 4.2% | 4.5% | 4.5% | 4.8% | 4.9% | 4.1% |
| Germany | 6.1% | 4.9% | 4.5% | 4.3% | 4.1% | 3.9% | 4.3% | 4.3% | 4.0% |
| France | 5.7% | 4.3% | 4.1% | 3.8% | 3.8% | 3.7% | 4.1% | 4.0% | 3.7% |
| Greece | 13.2% | 13.5% | 11.8% | 9.4% | 7.7% | 6.2% | 5.8% | 4.9% | 3.7% |
| Nigeria | 0.9% | 1.1% | 1.4% | 1.7% | 2.0% | 2.6% | 3.1% | 3.4% | 3.4% |
| Malaysia | 4.5% | 4.3% | 4.4% | 4.3% | 4.0% | 3.6% | 3.7% | 3.6% | 3.4% |
| Hong Kong | 3.7% | 3.6% | 3.7% | 3.7% | 3.5% | 3.4% | 3.1% | 3.0% | 2.8% |
| **Total Enrolment** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

Notes: See notes on data below.
Source: HESA.

## Higher Education Enrolment (Index, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| China | 100 | 192 | 328 | 557 | 757 | 835 | 804 | 786 | 719 |
| India | 100 | 130 | 206 | 332 | 389 | 444 | 511 | 634 | 689 |
| Ireland | 100 | 97 | 95 | 97 | 106 | 117 | 121 | 117 | 110 |
| USA | 100 | 82 | 87 | 101 | 117 | 125 | 129 | 139 | 121 |
| Germany | 100 | 83 | 80 | 86 | 88 | 91 | 96 | 102 | 99 |
| France | 100 | 77 | 77 | 82 | 87 | 91 | 96 | 101 | 98 |
| Greece | 100 | 105 | 97 | 88 | 77 | 67 | 60 | 54 | 43 |
| Nigeria | 100 | 125 | 158 | 216 | 280 | 384 | 453 | 525 | 556 |
| Malaysia | 100 | 99 | 105 | 116 | 116 | 113 | 113 | 116 | 116 |
| Hong Kong | 100 | 99 | 106 | 121 | 126 | 129 | 113 | 115 | 116 |
| **Total Enrolment** | **100** | **103** | **108** | **123** | **133** | **142** | **137** | **145** | **152** |

Notes: See notes on data below. Index set to 100 for 2000.
Source: HESA.

## Higher Education Enrolment (YoY Growth, Top 10 Source Countries)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|
| China | 91.7% | 71.2% | 69.7% | 35.8% | 10.3% | -3.6% | -2.3% | -8.5% |
| India | 29.7% | 59.0% | 60.8% | 17.3% | 14.1% | 15.1% | 24.1% | 8.7% |
| Ireland | -3.0% | -2.0% | 1.7% | 9.3% | 11.1% | 2.7% | -3.2% | -6.1% |
| USA | -17.8% | 5.9% | 16.5% | 15.0% | 7.5% | 2.6% | 8.1% | -12.8% |
| Germany | -17.3% | -3.6% | 7.5% | 2.6% | 3.8% | 5.7% | 5.6% | -2.7% |
| France | -22.9% | -0.1% | 6.2% | 7.0% | 3.5% | 6.6% | 4.9% | -2.9% |
| Greece | 5.3% | -8.2% | -9.0% | -12.2% | -13.8% | -10.2% | -9.2% | -21.3% |
| Nigeria | 25.0% | 26.0% | 37.3% | 29.6% | 37.1% | 17.9% | 15.9% | 5.8% |
| Malaysia | -1.3% | 6.7% | 10.3% | 0.2% | -2.8% | -0.2% | 3.1% | -0.7% |
| Hong Kong | -0.5% | 6.4% | 13.9% | 4.7% | 1.9% | -12.4% | 2.1% | 0.6% |
| **Total Enrolment** | **2.8%** | **5.1%** | **13.4%** | **8.3%** | **6.8%** | **-3.6%** | **6.2%** | **4.8%** |

Notes: See notes on data below.
Source: HESA.

## Notes on United Kingdom Data

HESA states that the 2007/8 data "do not include students who are 'writing up,' who were included in previous years' data, and therefore the data is not directly comparable to the same publication for previous years. The total number of non-UK students for 2007/8 was 341,790. Adjusted figures for 2006/7 and 2005/6 were 325,985 and 307,040 respectively."

The five-person discrepancy between this figure and the figure displayed in the first UK table in this section (341,795) is explained by historical rounding data issues inherent in HESA's statistical counting and analysis system.

Please note that the seeming decline in international student enrolment in 2006 therefore is an artefact of changes in data definition rather than a real reduction in enrolment figures.

## Key Organizational Statistics: British Council

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount (in the UK) | 1,010 |
| Staff headcount (outside the UK) | 4,560 |
| Staff headcount (teachers outside the UK) | 1,825 |
| **Total staff headcount** | **7,397** |
| | |
| **Number of offices** | |
| In the United Kingdom | 5 |
| Outside the United Kingdom | 177 |
| Total number of offices | **182** |
| | |
| **Expenses** | |
| Strengthening of educational cooperation | GBP 280,682,000 |
| Promotion of English language learning | GBP 195,597,000 |
| Strengthening of engagement with UK creativity | GBP 48,236,000 |
| Strengthening good governance and human rights | GBP 29,777,000 |
| Governance costs | GBP 3,110,000 |
| **Total expenses** | **GBP 557,402,000** |
| | |
| **Funding** | |
| Fees and income from services and other sources | GBP 250,502,000 |
| Grants receivable | GBP 197,831,000 |
| Funding for contract activity | GBP 113,654,000 |
| Interest earned | GBP 2,600,000 |
| **Total funding** | **GBP 564,587,000** |

Notes: The number of offices does not include British Council libraries, teaching centers, and other centers, except those which are a part of the main offices accounted for here. Budget figures are rounded off to the nearest '000, and are for 2007-8.
Sources: British Council Annual Report and British Council website.

## Universities UK

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount | 75 |
| **Total staff headcount** | **75** |
| | |
| **Number of offices** | |
| In the United Kingdom | 3 |
| Outside the United Kingdom | 0 |
| **Total number of offices** | **3** |
| | |
| **Expenses** | |
| Charitable activities | GBP 9.259,736,000 |
| Fundraising trading | GBP 205,079,000 |
| Governance costs | GBP 152,548,000 |
| Cost of generating voluntary income | GBP 48,363,000 |
| **Total expenses** | **GBP 9,665,726,000** |
| | |
| **Funding** | |
| Subscriptions from membership | GBP 4,469,681,000 |
| Grants and donations from funding bodies | GBP 3,790,735,000 |
| Covenanted income | GBP 915,569,000 |
| Investment income | GBP 238,239,000 |
| Conference income | GBP 223,576,000 |
| Sale of goods and services | GBP 183,834,000 |
| Publications and other small sales | GBP 7,873,000 |
| Voluntary income donations | GBP 5,213,000 |
| Other incoming resources | GBP 4,714,000 |
| **Total funding** | **GBP 9,839,434,000** |

Notes: Budget figures are rounded off to the nearest ‘000, and are for 2008.
Sources: UUK Annual Review, UUK Financial Statements, and UUK website.

# United States

## Higher Education Enrolment (Total, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| India | 42,337 | 54,664 | 66,836 | 74,603 | 79,736 | 80,466 | 76,503 | 83,833 | 94,563 |
| China | 54,466 | 59,939 | 63,211 | 64,757 | 61,765 | 62,523 | 62,582 | 67,723 | 81,127 |
| South Korea | 41,191 | 45,685 | 49,046 | 51,519 | 52,484 | 53,358 | 59,022 | 62,392 | 69,124 |
| Japan | 46,872 | 46,497 | 46,810 | 45,960 | 40,835 | 42,215 | 38,712 | 35,282 | 33,974 |
| Canada | 23,544 | 25,279 | 26,514 | 26,513 | 27,017 | 28,140 | 28,202 | 28,280 | 29,051 |
| Taiwan | 29,234 | 28,566 | 28,930 | 28,017 | 26,178 | 25,914 | 27,876 | 29,094 | 29,001 |
| Mexico | 10,607 | 10,670 | 12,518 | 12,801 | 13,329 | 13,063 | 13,931 | 13,826 | 14,837 |
| Turkey | 10,100 | 10,983 | 12,091 | 11,601 | 11,398 | 12,474 | 11,622 | 11,506 | 12,030 |
| Saudi Arabia | 5,156 | 5,273 | 5,579 | 4,175 | 3,521 | 3,035 | 3,448 | 7,886 | 9,873 |
| Thailand | 10,983 | 11,187 | 11,606 | 9,982 | 8,937 | 8,637 | 8,765 | 8,886 | 9,004 |
| **Total Enrolment** | **514,723** | **547,867** | **582,996** | **586,323** | **572,509** | **565,039** | **564,766** | **582,984** | **623,805** |

Source: IIE Open Doors.

## Higher Education Enrolment (Share, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| India | 8.2% | 10.0% | 11.5% | 12.7% | 13.9% | 14.2% | 13.5% | 14.4% | 15.2% |
| China | 10.6% | 10.9% | 10.8% | 11.0% | 10.8% | 11.1% | 11.1% | 11.6% | 13.0% |
| South Korea | 8.0% | 8.3% | 8.4% | 8.8% | 9.2% | 9.4% | 10.5% | 10.7% | 11.1% |
| Japan | 9.1% | 8.5% | 8.0% | 7.8% | 7.1% | 7.5% | 6.9% | 6.1% | 5.4% |
| Canada | 4.6% | 4.6% | 4.5% | 4.5% | 4.7% | 5.0% | 5.0% | 4.9% | 4.7% |
| Taiwan | 5.7% | 5.2% | 5.0% | 4.8% | 4.6% | 4.6% | 4.9% | 5.0% | 4.6% |
| Mexico | 2.1% | 1.9% | 2.1% | 2.2% | 2.3% | 2.3% | 2.5% | 2.4% | 2.4% |
| Turkey | 2.0% | 2.0% | 2.1% | 2.0% | 2.0% | 2.2% | 2.1% | 2.0% | 1.9% |
| Saudi Arabia | 1.0% | 1.0% | 1.0% | 0.7% | 0.6% | 0.5% | 0.6% | 1.4% | 1.6% |
| Thailand | 2.1% | 2.0% | 2.0% | 1.7% | 1.6% | 1.5% | 1.6% | 1.5% | 1.4% |
| **Total Enrolment** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |

Source: IIE Open Doors.

## Higher Education Enrolment (Index, Top 10 Source Countries)

| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|---|
| India | 100 | 129 | 158 | 176 | 188 | 190 | 181 | 198 | 223 |
| China | 100 | 110 | 116 | 119 | 113 | 115 | 115 | 124 | 149 |
| South Korea | 100 | 111 | 119 | 125 | 127 | 130 | 143 | 151 | 168 |
| Japan | 100 | 99 | 100 | 98 | 87 | 90 | 83 | 75 | 72 |
| Canada | 100 | 107 | 113 | 113 | 115 | 120 | 120 | 120 | 123 |
| Taiwan | 100 | 98 | 99 | 96 | 90 | 89 | 95 | 100 | 99 |
| Mexico | 100 | 101 | 118 | 121 | 126 | 123 | 131 | 130 | 140 |
| Turkey | 100 | 109 | 120 | 115 | 113 | 124 | 115 | 114 | 119 |
| Saudi Arabia | 100 | 102 | 108 | 81 | 68 | 59 | 67 | 153 | 191 |
| Thailand | 100 | 102 | 106 | 91 | 81 | 79 | 80 | 81 | 82 |
| **Total Enrolment** | **100** | **106** | **113** | **114** | **111** | **110** | **110** | **113** | **121** |

Notes: Index set to 100 for 2000.
Source: IIE Open Doors.

## Higher Education Enrolment (YoY Growth, Top 10 Source Countries)

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|---|---|---|---|---|---|---|---|---|
| India | 29.1% | 22.3% | 11.6% | 6.9% | 0.9% | -4.9% | 9.6% | 12.8% |
| China | 10.0% | 5.5% | 2.4% | -4.6% | 1.2% | 0.1% | 8.2% | 19.8% |
| South Korea | 10.9% | 7.4% | 5.0% | 1.9% | 1.7% | 10.6% | 5.7% | 10.8% |
| Japan | -0.8% | 0.7% | -1.8% | -11.2% | 3.4% | -8.3% | -8.9% | -3.7% |
| Canada | 7.4% | 4.9% | 0.0% | 1.9% | 4.2% | 0.2% | 0.3% | 2.7% |
| Taiwan | -2.3% | 1.3% | -3.2% | -6.6% | -1.0% | 7.6% | 4.4% | -0.3% |
| Mexico | 0.6% | 17.3% | 2.3% | 4.1% | -2.0% | 6.6% | -0.8% | 7.3% |
| Turkey | 8.7% | 10.1% | -4.1% | -1.7% | 9.4% | -6.8% | -1.0% | 4.6% |
| Saudi Arabia | 2.3% | 5.8% | -25.2% | -15.7% | -13.8% | 13.6% | 128.7% | 25.2% |
| Thailand | 1.9% | 3.7% | -14.0% | -10.5% | -3.4% | 1.5% | 1.4% | 1.3% |
| **Total Enrolment** | **6.4%** | **6.4%** | **0.6%** | **-2.4%** | **-1.3%** | **0.0%** | **3.2%** | **7.0%** |

Source: IIE Open Doors.

## Key Organizational Statistics: educationUSA

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount (in the USA) | n/a |
| Staff headcount (outside the USA) | n/a |
| **Total headcount** | **n/a** |
| | |
| **Number of offices** | |
| In the United States | 1 |
| Outside the United States (advising centers) | 450 |
| **Total number of offices** | **451** |
| | |
| **Expenses** | |
| Expenses | n/a |
| **Total expenses** | **n/a** |
| | |
| **Funding** | |
| Funding | n/a |
| **Total funding** | **n/a** |

Notes: Much of the information for educationUSA is not available because the parent department – the Bureau of Educational and Cultural Affairs, a division within the Department of State – does not publish information on educationUSA. Despite repeated attempts to contact the Bureau, no information regarding educationUSA statistics has been forthcoming. A Freedom of Information Act (FOIA) request has been filed and is pending.

Sources: educationUSA website and Department of State, Bureau of Educational and Cultural Affairs website.

## Key Organizational Statistics: NAFSA, Association of International Educators

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount (headquarter) | 66 |
| **Total staff headcount** | **66** |
| | |
| **Number of offices** | |
| In the United States (headquarter) | 1 |
| Outside the United States | 0 |
| **Total number of offices** | **1** |
| | |
| **Members** | |
| Number of members | 10,300 |
| **Total members** | **10,300** |
| | |
| **Expenses** | |
| Expenses | USD 11,052,488 |
| **Total expenses** | **USD 11,052,488** |
| | |
| **Funding** | |
| Funding | USD 11,466,217 |
| **Total funding** | **USD 11,466,217** |

Notes: Budget figures are for 2007.
Sources: NAFSA Report to Members and NAFSA website.

# The Netherlands

## Key Organizational Statistics: Nuffic

| | |
|---|---|
| **Staff headcount** | |
| Staff headcount (headquarter) | 216 |
| Staff headcount (outside headquarter) | 60 |
| **Total headcount** | **276** |
| | |
| **Number of offices** | |
| In the Netherlands | 1 |
| Outside the Netherlands (advising centers) | 11 |
| **Total number of offices** | **12** |
| | |
| **Expenses** | |
| Program expenditure | EUR 132,021,000 |
| Salary and operating costs* | EUR 24,200,000 |
| **Total expenses** | **EUR 156,221,000** |
| | |
| **Funding** | |
| Ministry of International Affairs | EUR 90,755,000 |
| European Union | EUR 25,134,000 |
| Ministry of Education, Culture and Science | EUR 12,957,000 |
| Other | EUR 3,175,000 |
| **Total funding** | **EUR 132,021,000** |

Notes: Number of offices outside the Netherlands includes eight Netherlands Education Support Offices (NESO) and three NESO desks. Salary and operating costs (*) are covered by a separate line item. Budget figures are the most recent available as of September 2009.
Source: Nuffic website.