The A Federal Government Perspective

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OISE, University of Toronto
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GOVERNMENT OF CANADA & INTERNATIONAL EDUCATION
# Complex Ecosystem

## National/Regional Associations
- Universities Canada, CICan, CBIE, Languages Canada, CAPS-I, CAIS, CALDO, U15, Polytechnics Canada, BCCIE, EduNova etc.

## Provincial/Territorial Governments
- 22 provincial ministries of education
- Council of Ministers of Education, Canada (CMEC)

## Federal Government
- GAC, IRCC, ISEAD, ESDC, IDRC, AANDC, Statistics Canada, Granting Councils

## Institutions and other TCS clients
- 160 universities, 228 colleges and polytechnics, 3,250+ primary & secondary schools, language schools, and career/vocational colleges
Complex Department

Global Affairs Canada Organizational Structure

BBY – International Education Division
What the International Education Division (BBY) does

– Brand and promote Canada as a study/research destination and partner
– Support TCS at Canadian Embassies and Consulates abroad.
– Advance Canada’s international education interests abroad
– Manage international scholarship programs
The Trade Commissioner Service (TCS)

The TCS promotes Canadian economic interests in the global marketplace

With over 120 YEARS of experience, the TCS can help you in over 160 CITIES worldwide.

On average, companies using TCS services export 20.5% more than those that don’t, and access 20.9% more markets.
TCS Support to Education Sector

In 2016-17, the TCS:

• Provided 4,761 services;
• In support of 760 clients;
• In over 100 cities abroad;
• And through over 300 activities
EDUCATION SERVICE EXPORTS
International Education Contributes to Canada’s Prosperity

1. Major service export – In 2014, 326,000 International Students across Canada:
   - spent over $11.4B
   - sustained over 123,000 jobs

2. Addresses skills and demographic gaps across Canada

3. Improves Canada’s competitiveness via R&D, innovation and commercialization.
“Internationalization”

Commercial Benefits

Education Sector’s
Internationalization
Priorities

Education Sector’s
Domestic Priorities
Canada’s International Education Strategy (IES)

Key IES Objectives:

- Promote Canada as world-class study and research destination
- Double # of international students to 450,000+ by 2022

Key Elements of the IES:

- Integrated Marketing Plan – New Brand & Digital Strategy
- Leveraging International Scholarships to promote Canada
- Coordination and cooperation with provinces and territories, private sector, and education sector
- Priority, Mature, and Emerging Markets
SOME INTERNATIONAL STUDENT STATISTICS
Canada: Top 10 Source Countries

International Students in 2016

<table>
<thead>
<tr>
<th>Source Countries</th>
<th>Number of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>131,830</td>
</tr>
<tr>
<td>India</td>
<td>76,320</td>
</tr>
<tr>
<td>S. Korea</td>
<td>21,270</td>
</tr>
<tr>
<td>France</td>
<td>20,695</td>
</tr>
<tr>
<td>USA</td>
<td>12,865</td>
</tr>
<tr>
<td>Nigeria</td>
<td>10,735</td>
</tr>
<tr>
<td>Brazil</td>
<td>9,225</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>9,105</td>
</tr>
<tr>
<td>Japan</td>
<td>7,785</td>
</tr>
<tr>
<td>Vietnam</td>
<td>7,500</td>
</tr>
</tbody>
</table>

Source: IRCC December 31st, 2016 Data
Where Are Chinese Students Going?


Source: UNESCO Global Flow of Tertiary-Level Students
Where Are Indian Students Going?


Source: UNESCO Global Flow of Tertiary-Level Students
Province and Territory Breakdown

International Students in Canada by Province/Territory

Source: IRCC December 31st, 2016 Data
Canada: Top 10 Source Countries

International Students in 2016

- **China**: 131,830
- **India**: 76,320
- **S. Korea**: 21,270
- **France**: 20,695
- **USA**: 12,865
- **Nigeria**: 10,735
- **Brazil**: 9,225
- **Saudi Arabia**: 9,105
- **Japan**: 7,785
- **Vietnam**: 7,500

Source: IRCC December 31st, 2016 Data
Ontario: Top 10 Source Countries

International Students in 2016

<table>
<thead>
<tr>
<th>Source Country</th>
<th>Number of Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>65,560</td>
</tr>
<tr>
<td>India</td>
<td>51,825</td>
</tr>
<tr>
<td>S. Korea</td>
<td>9,160</td>
</tr>
<tr>
<td>Nigeria</td>
<td>5,460</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>4,520</td>
</tr>
<tr>
<td>Vietnam</td>
<td>3,715</td>
</tr>
<tr>
<td>Brazil</td>
<td>3,550</td>
</tr>
<tr>
<td>USA</td>
<td>3,220</td>
</tr>
<tr>
<td>Japan</td>
<td>2,045</td>
</tr>
<tr>
<td>Mexico</td>
<td>1,750</td>
</tr>
</tbody>
</table>

Source: IRCC December 31st, 2016 Data
## Growth in International Students

<table>
<thead>
<tr>
<th>Country</th>
<th># of I.S. in Canada 2015</th>
<th># of I.S. in Canada 2016</th>
<th>Canada Growth</th>
<th>Ontario Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>117,545</td>
<td>131,830</td>
<td>12.30%</td>
<td>15.37%</td>
</tr>
<tr>
<td>India</td>
<td>48,515</td>
<td>76,320</td>
<td>57.40%</td>
<td>62.11%</td>
</tr>
<tr>
<td>All Others</td>
<td>184,985</td>
<td>204,865</td>
<td>10.75%</td>
<td>11.44%</td>
</tr>
<tr>
<td>Total</td>
<td>351,045</td>
<td>413,015</td>
<td>17.70%</td>
<td>23.60%</td>
</tr>
</tbody>
</table>
OUTBOUND MOBILITY
Where Are Canadian Students Going?


Source: UNESCO Global Flow of Tertiary-Level Students
Foreign Government Awards for Canadians

<table>
<thead>
<tr>
<th>Scholarship program</th>
<th>Level of study</th>
<th>Value</th>
<th>Duration</th>
<th>Destination</th>
<th>ISP support</th>
<th>Approx. Launch &amp; closing date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan MEXT Scholarships</td>
<td>Undergraduate, graduate</td>
<td>Varies</td>
<td>2-7 years</td>
<td>Japan</td>
<td></td>
<td>APRIL - MAY</td>
</tr>
<tr>
<td>Foreign Government Award - Korea</td>
<td>Graduate</td>
<td>Varies</td>
<td>2-3 years</td>
<td>Korea</td>
<td></td>
<td>FEBRUARY - MARCH</td>
</tr>
<tr>
<td>Foreign Government Award Mexico</td>
<td>Undergraduate, graduate</td>
<td>Varies</td>
<td>Varies</td>
<td>Mexico</td>
<td></td>
<td>SEPTEMBER - OCTOBER</td>
</tr>
<tr>
<td>Commonwealth Scholarship Program - UK</td>
<td>Graduate</td>
<td>Varies</td>
<td>1-3 years</td>
<td>United-Kingdom</td>
<td></td>
<td>MARCH</td>
</tr>
<tr>
<td>Commonwealth Scholarship Program - India</td>
<td>Undergraduate, graduate</td>
<td>Full scholarship</td>
<td>Varies</td>
<td>India</td>
<td></td>
<td>DECEMBER - FEBRUARY</td>
</tr>
<tr>
<td>Commonwealth Scholarship Program New-Zealand</td>
<td>Graduate</td>
<td>Varies</td>
<td>1-3 years</td>
<td>New-Zealand</td>
<td></td>
<td>JUNE-AUGUST</td>
</tr>
</tbody>
</table>
Outbound Strategies…

Brazil: 100,000 Science Without Borders
Mexico: Projecto 100,000/Projecto 10,000
China: 800,000 outbound students
India: 225,000 outbound students
...Outbound Strategies

Australia: New Colombo Plan

USA: 100,000 Strong X2

EU: Erasmus
The 3% Myth

“(…) only 3% of Canadian undergraduate students participate in a study abroad experience each year” – Universities Canada

- The “each year” is often omitted when this figure is quoted.

3% = 12%? 15%?
## Outbound Enrolment Ratios

### G7 + Australia

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Country</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Germany</td>
<td>2.8</td>
</tr>
<tr>
<td>2</td>
<td>France</td>
<td>2.1</td>
</tr>
<tr>
<td>3</td>
<td>Canada</td>
<td>2.0</td>
</tr>
<tr>
<td>4</td>
<td>Italy</td>
<td>1.8</td>
</tr>
<tr>
<td>5</td>
<td>Australia</td>
<td>0.8</td>
</tr>
<tr>
<td>6</td>
<td>UK</td>
<td>0.7</td>
</tr>
<tr>
<td>7</td>
<td>Japan</td>
<td>0.6</td>
</tr>
<tr>
<td>8</td>
<td>US</td>
<td>0.3</td>
</tr>
</tbody>
</table>

*Source: UNESCO 2014 Gross outbound enrolment ratio by host region*
Percentage of National Students Enrolled Abroad Select OECD Countries 2015

Students Abroad

<table>
<thead>
<tr>
<th>Source Countries</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sweden</td>
<td>4.2</td>
</tr>
<tr>
<td>Germany</td>
<td>4.1</td>
</tr>
<tr>
<td>France</td>
<td>3.9</td>
</tr>
<tr>
<td>Canada</td>
<td>3.4</td>
</tr>
<tr>
<td>New Zealand</td>
<td>2.4</td>
</tr>
<tr>
<td>UK</td>
<td>1.4</td>
</tr>
<tr>
<td>Australia</td>
<td>0.7</td>
</tr>
<tr>
<td>USA</td>
<td>0.2</td>
</tr>
</tbody>
</table>

Source: Alex Usher, Higher Education Strategy Associates
SUCCESES AND CHALLENGES
Successes

1. 413,000 of 450,000+ students in 2016
2. Integrated Marketing Plan completed
3. New EduCanada Brand launched
4. Digital Strategy “blueprints” completed
5. FPT cooperation—e.g. Canada-China MOU on Education Cooperation
6. Support to TCS network upgraded
EDUCATION IN CANADA
A World of Possibilities Awaits

› EduCanada.ca
Challenges

1. Increased International Competition
2. Changing Demand
3. Competitive Digital Strategy?
1. Increasing Competition

- USA still #1 destination
- UK still #2 destination
- New Competitors:
  - New Zealand, Malaysia, Korea, Japan, Sweden…
- Canada has fallen from #6 to #8 as destination
2. Changing Demand

- Technical and Vocational Educational Training (TVET):
  - China is converting 500 universities to polytechnicsin Canada
  - Increasing number of Indian students going abroad to study in STEM & TVET
  - TVET driving colleges and institute growth in Canada
3. Digital Marketing Strategy

- Importance
- Blueprints drawn up...
- GAC is laying foundation:
  - GAC blueprints → Atlantic Growth Strategy pilot project funded by ACOA and the Atlantic provinces
  - Nudge international students
- …but insufficient funding
Canada has a critical weakness: Lack of an effective digital strategy

<table>
<thead>
<tr>
<th>Digital Strategy tools and channels benchmark analysis</th>
<th>Australia</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Search Engine Marketing (Google): 1. Paid and 2. Organic</td>
<td>✔️</td>
<td>✗</td>
</tr>
</tbody>
</table>
| 2 Social Media Marketing: 1. Paid and 2. Organic  
  • Facebook (Aus: 239,000 likes); Twitter (Aus: 109,000 followers);  
  • Youtube (Aus: 1,207,000 views vs Can: 7,500 views) | ✔️        | ✗      |
| 3 Integrated Site with Local Language “micro-sites”  
  • Local content  
  • Prospects can easily find information on one site. | ✔️        | ✗      |
| 4 Searchable Database  
  • Sophisticated search on Institutions, Programs, Costs and Scholarships | ✔️        | ✗      |
| 5 Customer Relationship Management (CRM) and User Accounts  
  • Access to hundreds of thousands of prospects | ✔️        | ✗      |
International Education: Canada’s moment, or Canada at risk?