



International Education and the Competitive Landscape for English-Speaking Destinations

Uri Carnat – IDP Education Canada

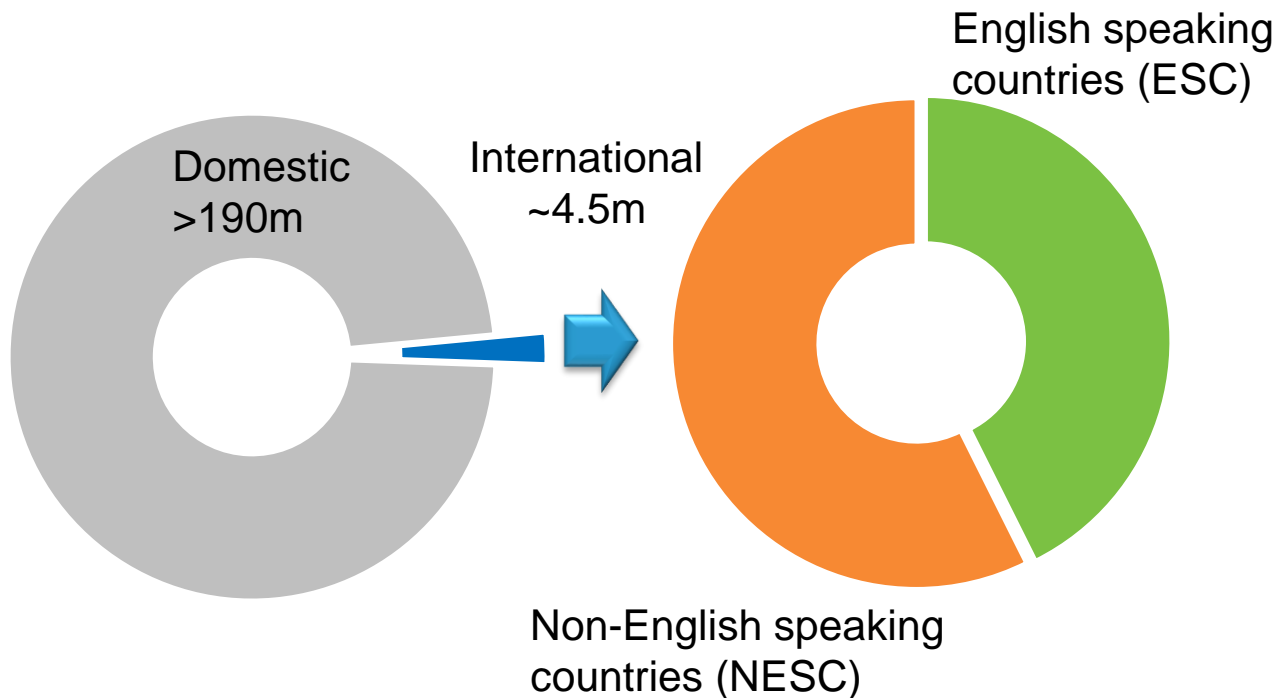


International Education landscape

Global
HE students

International HE
students

International Education
Alternatives

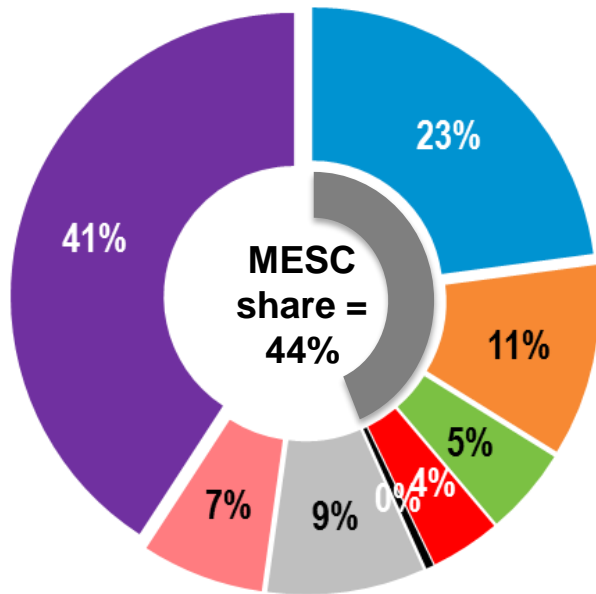


- Emerging destinations/ regional hubs
- English – the medium of instruction in NESC
- Transnational education (TNE)
- Digital revolution
- New & non-traditional players

International Education – main ESC

International student enrolments in tertiary education by destination country

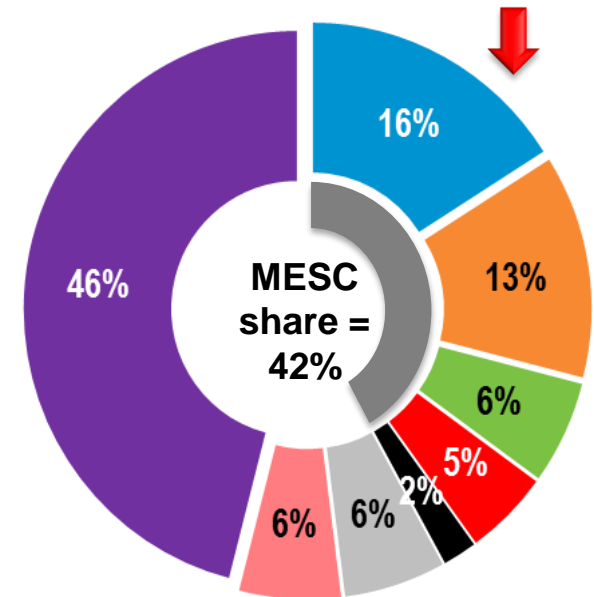
Market Share – 2000



5 main English speaking countries (MESC)

- USA
- UK
- Australia
- Canada
- New Zealand
- Germany
- France
- Rest of world

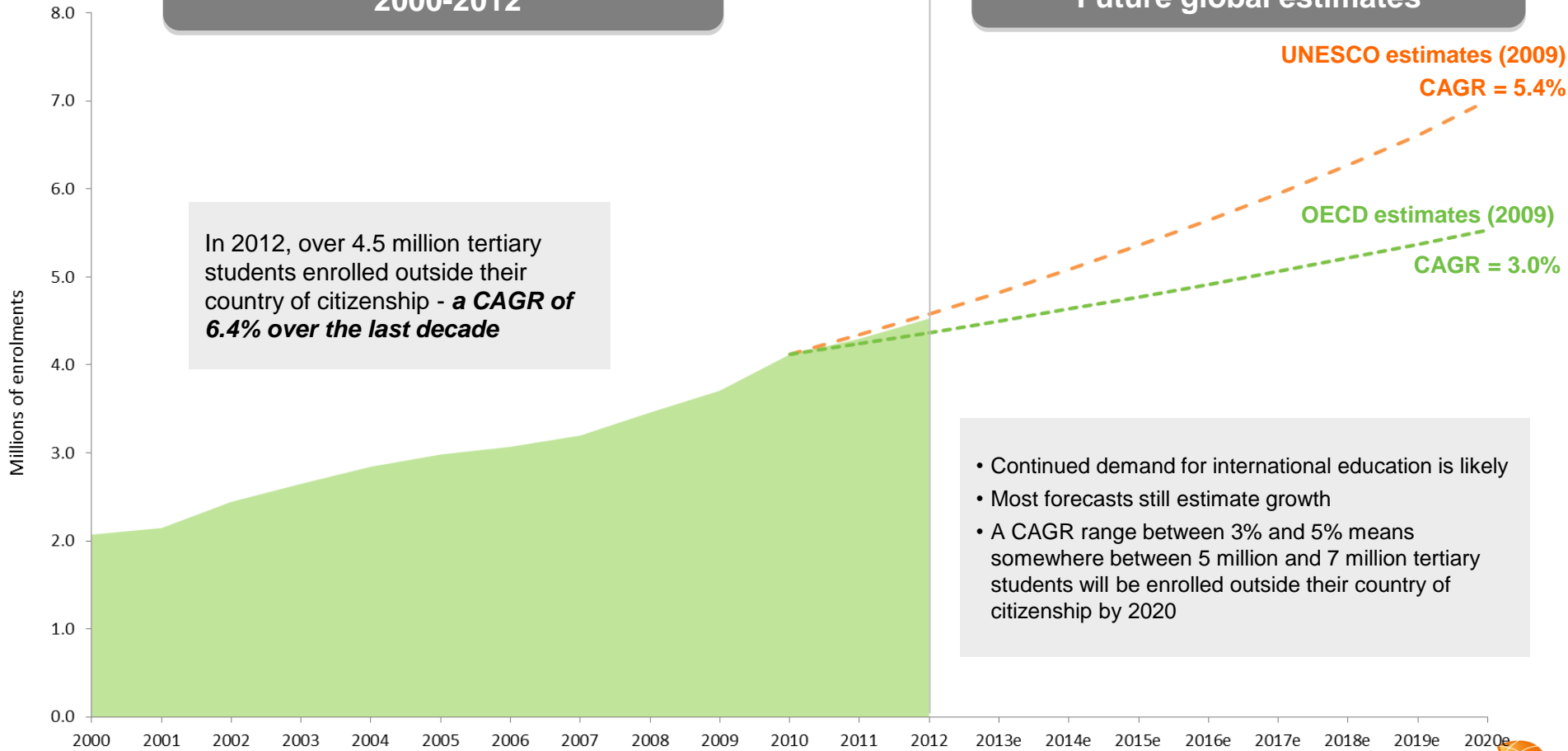
Market Share – 2012



Global - International student flows

International Student Enrolments: 2000-2012

International Student Enrolments: Future global estimates



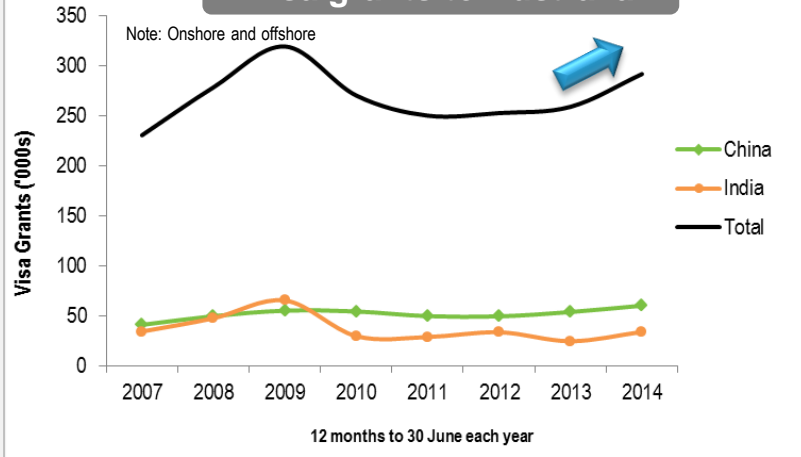
- Continued demand for international education is likely
- Most forecasts still estimate growth
- A CAGR range between 3% and 5% means somewhere between 5 million and 7 million tertiary students will be enrolled outside their country of citizenship by 2020

CAGR = compound annual growth rate

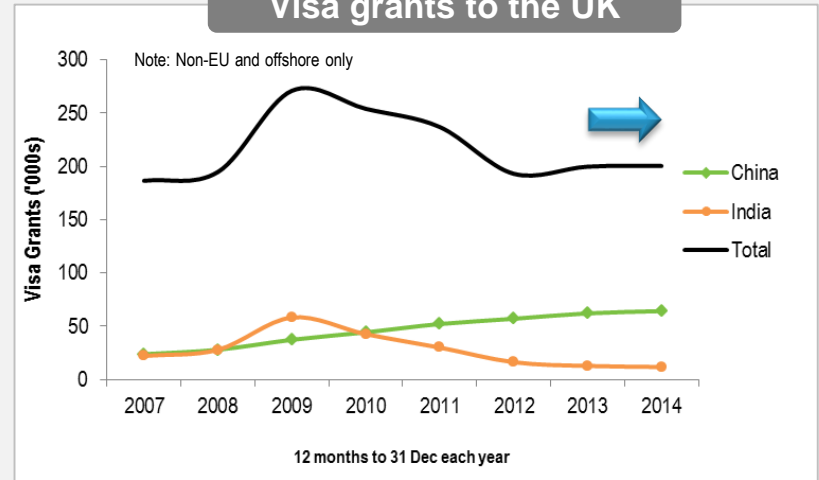
• Steady growth in international student flows likely to continue

4 main English speaking countries: visa trends

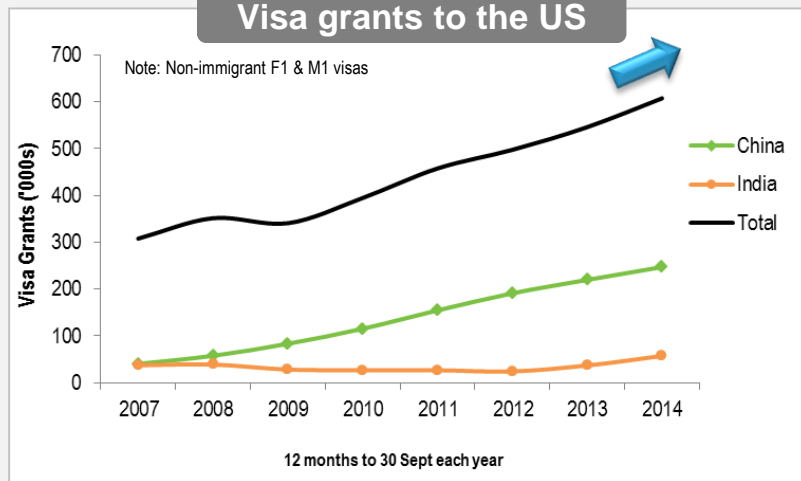
Visa grants to Australia



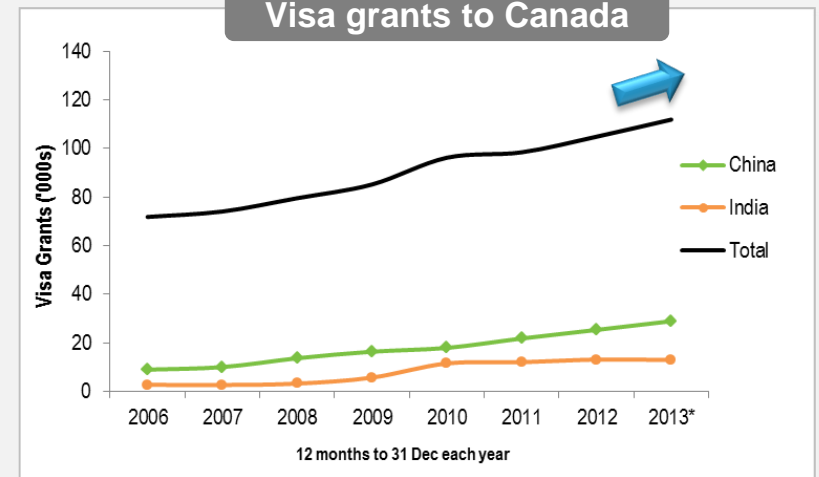
Visa grants to the UK



Visa grants to the US



Visa grants to Canada



And New Zealand...



ThinkNew®

LEARN

LIVE

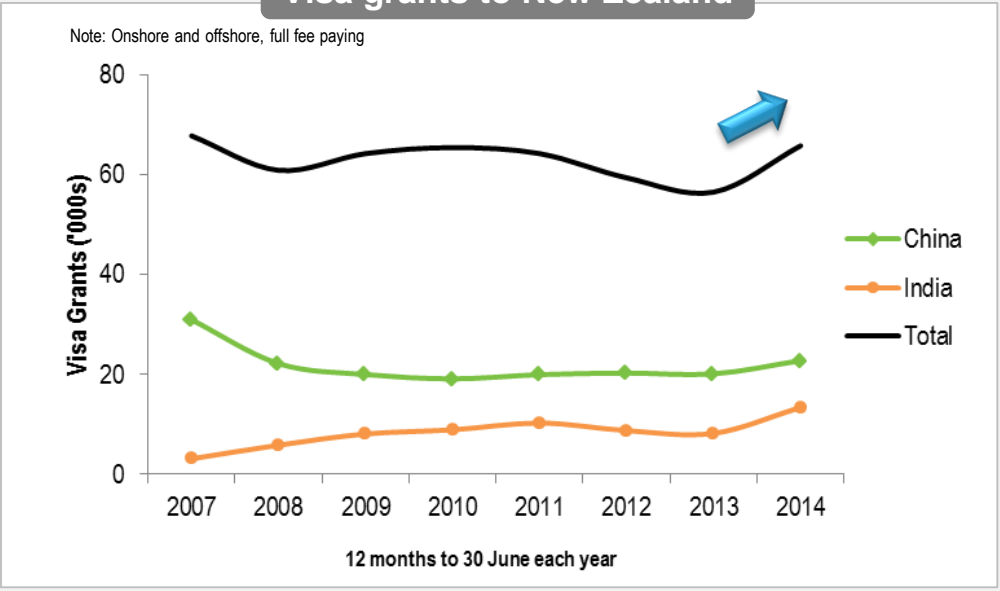
WORK

GET STARTED

GLOBAL CITIZENSHIP, A NEW WAY TO LOOK AT EDUCATION
The skills you gain in New Zealand will take you all over the world.

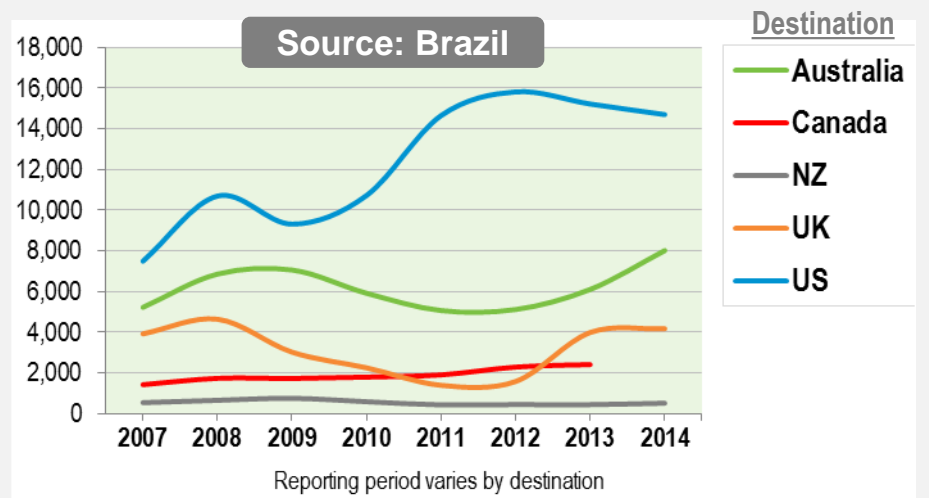
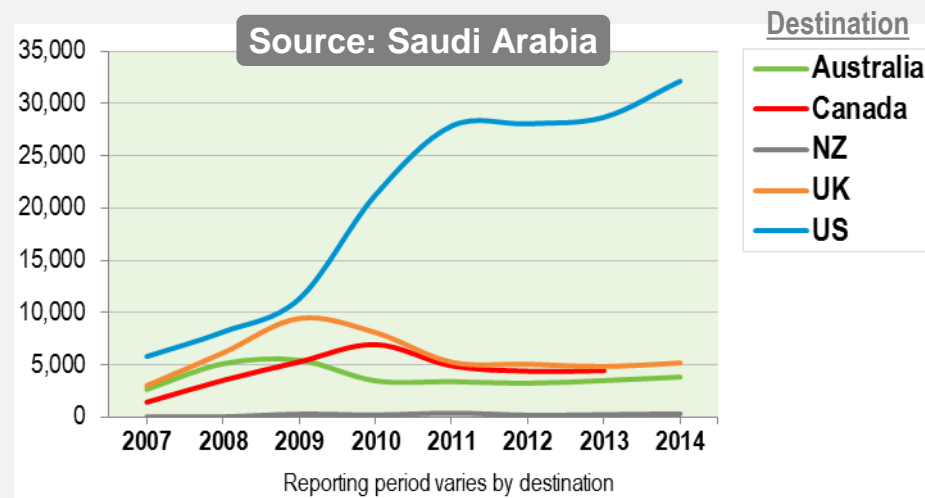
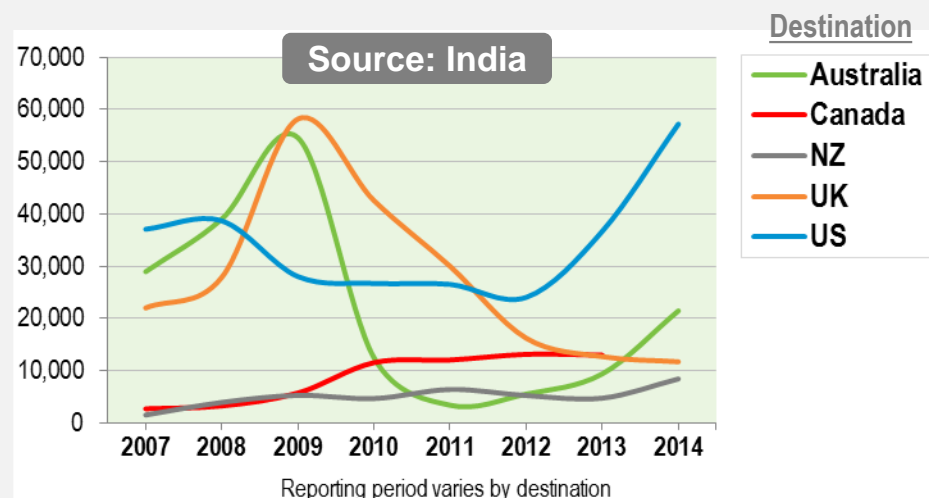
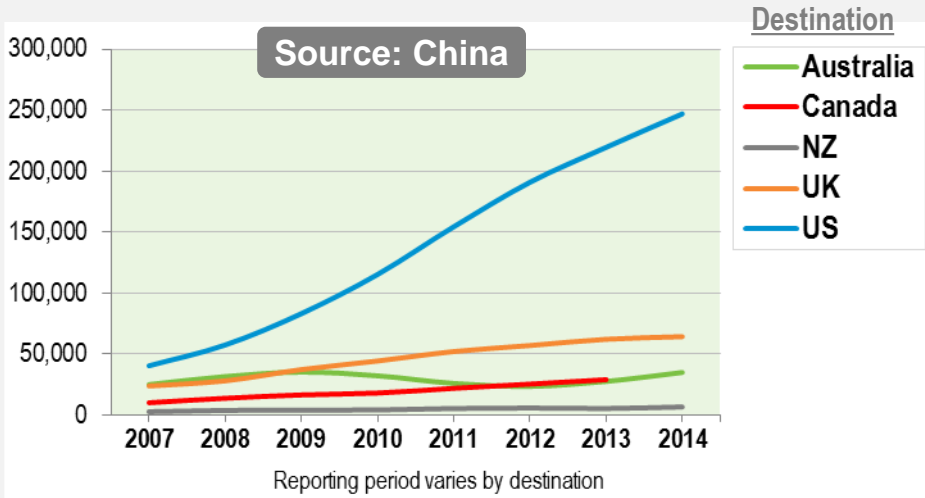
THE MOST EXCITING PLACE TO LEARN A NEW LANGUAGE
For a great education and an incredible adventure, come to New Zealand.

Visa grants to New Zealand



Photos : <http://www.studyinnewzealand.com/learn/learn-think-new>
Source: Business Information Services, NZ Department of Labour (Immigration)

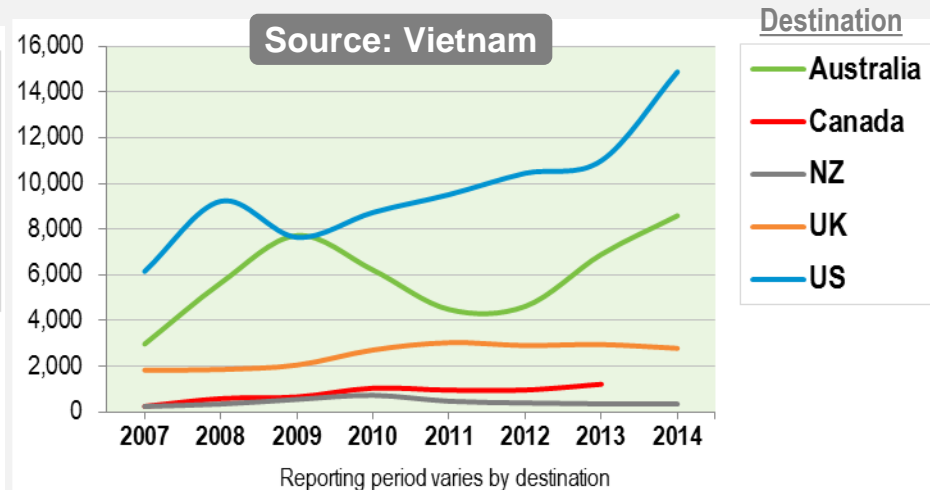
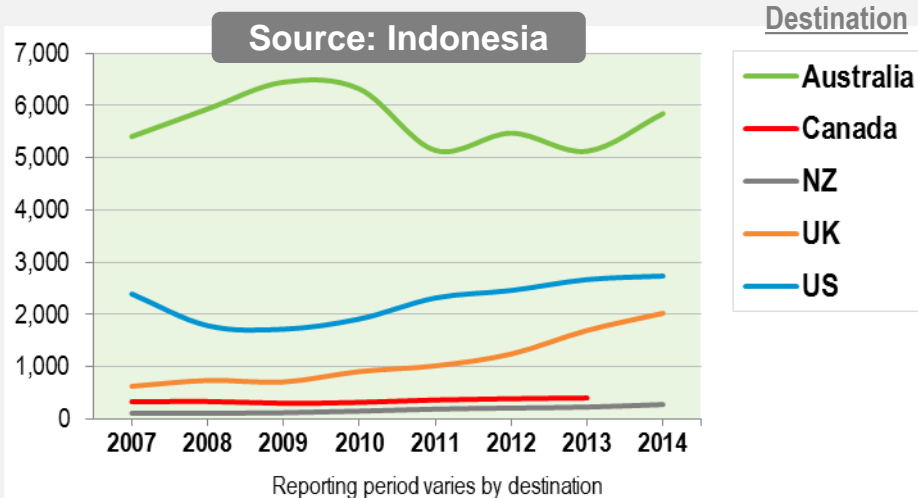
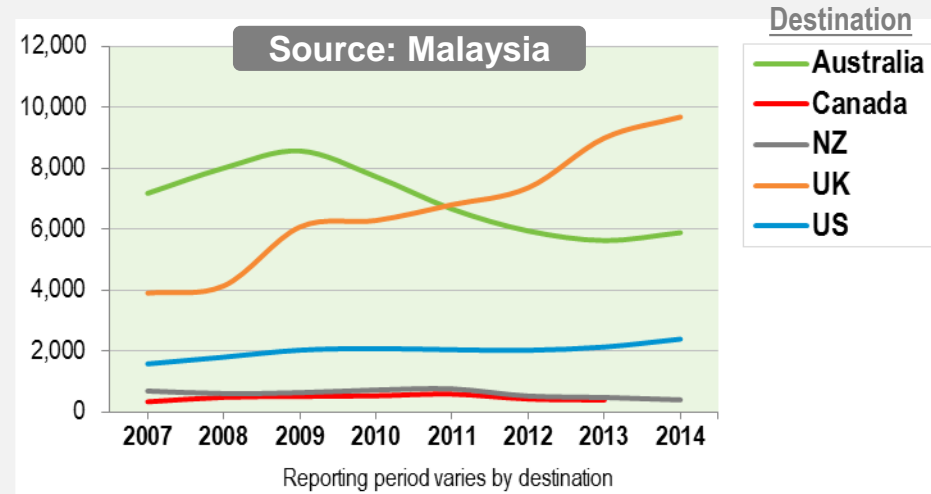
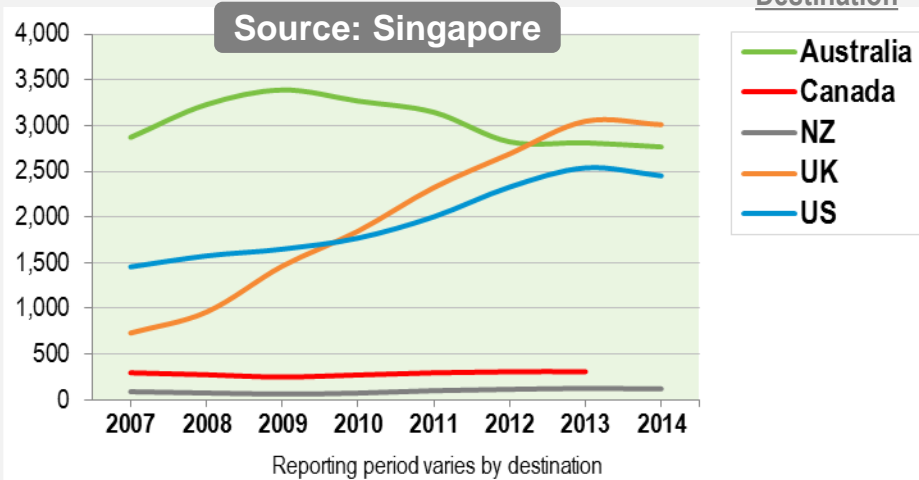
Key source markets for 5 MESC: student visa grants



Note: Data based on Australia and NZ – offshore only, UK - offshore, non-EU only, Canada and US – total

Sources: NZ Department of Labour (Immigration) Australia DIBP, Canada CIC *2013 preliminary data, UK Border Agency, US Dept. of State

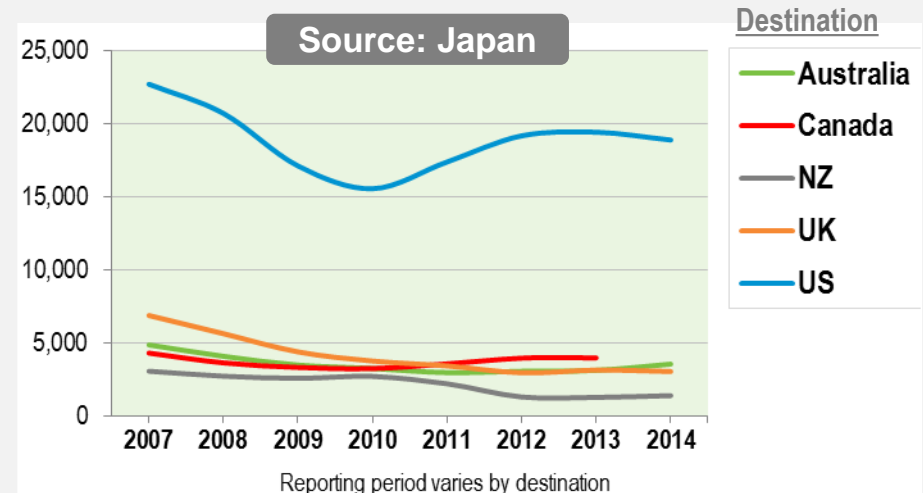
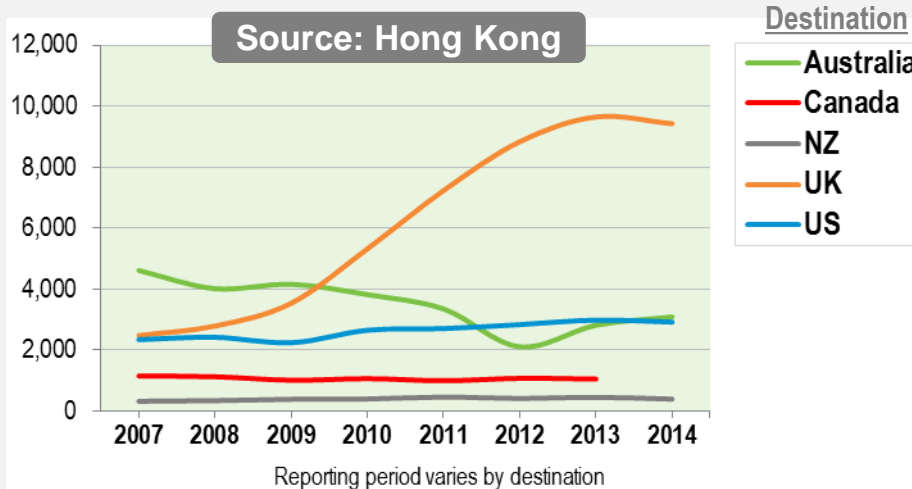
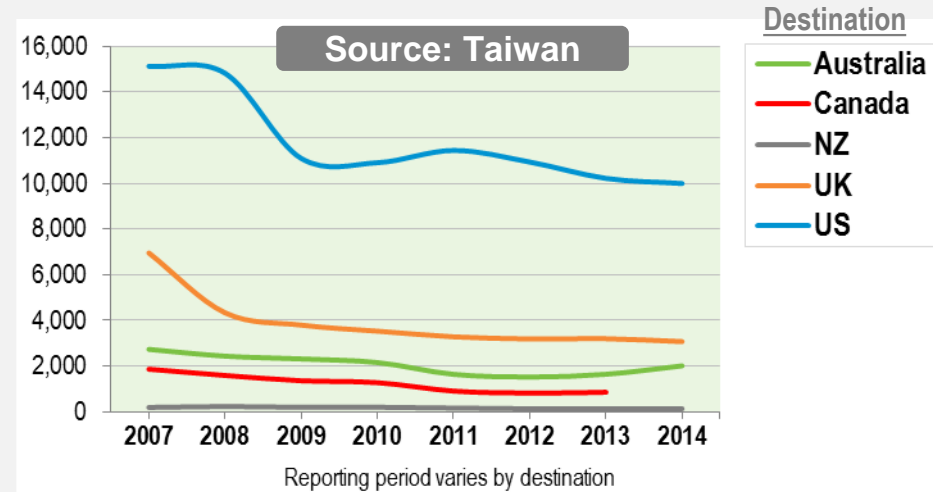
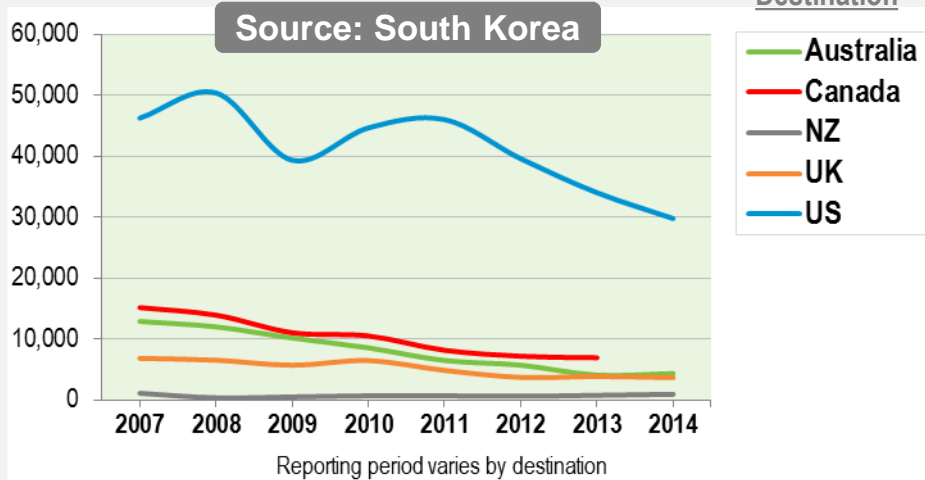
South East Asia to 5 MESC: student visa grants



Note: Data based on Australia and NZ – offshore only, UK – offshore, non-EU only, Canada and US – total

Sources: NZ Department of Labour (Immigration) Australia DIBP, Canada CIC *2013 preliminary data, UK Border Agency, US Dept. of State

Slow down of North Asia to 5 MESC: student visa grants (except China)

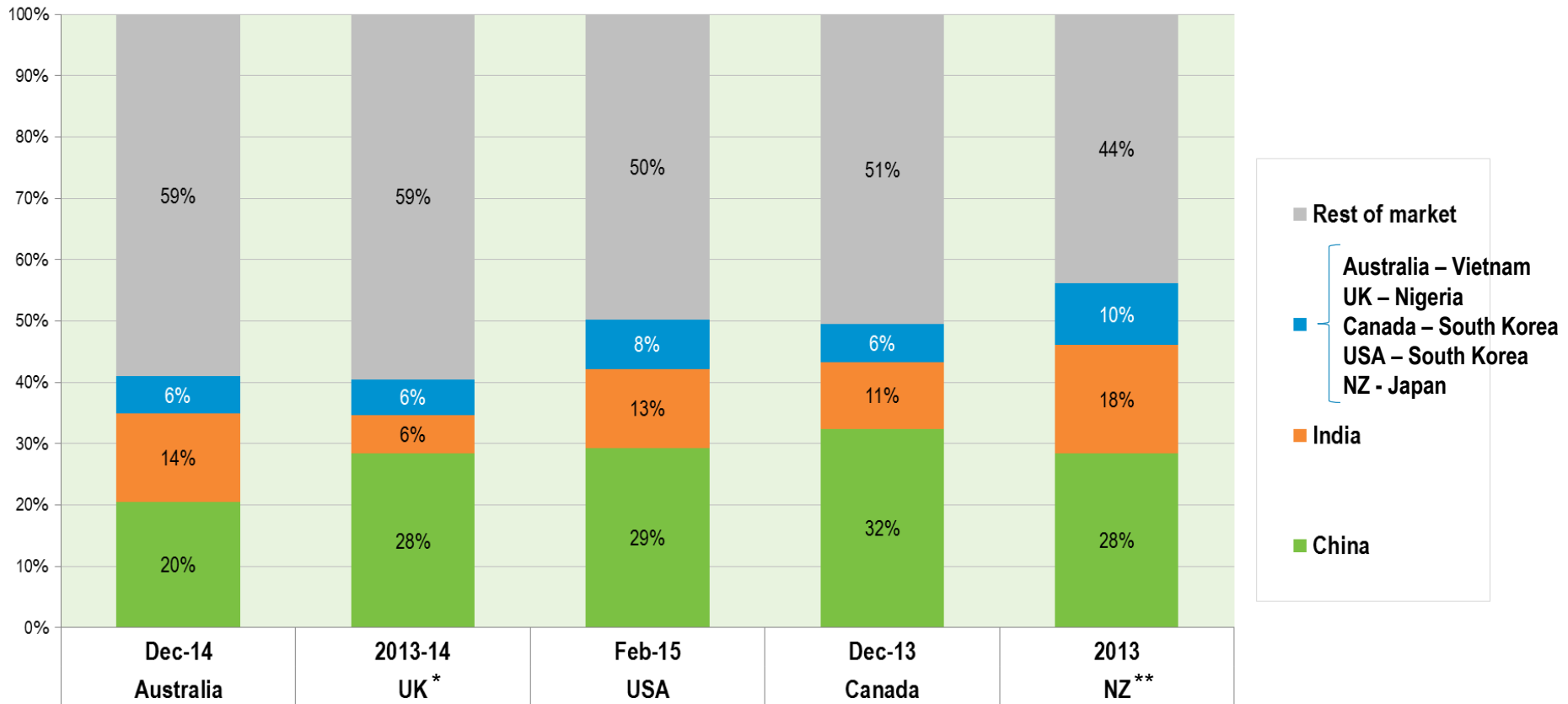


Note: Data based on Australia and NZ – offshore only, UK - offshore, non-EU only, Canada and US – total

Sources: NZ Department of Labour (Immigration) Australia DIBP, Canada CIC *2013 preliminary data, UK Border Agency, US Dept. of State

Destination countries: source market diversity

Proportion of students currently studying from top 3 source markets for MESC



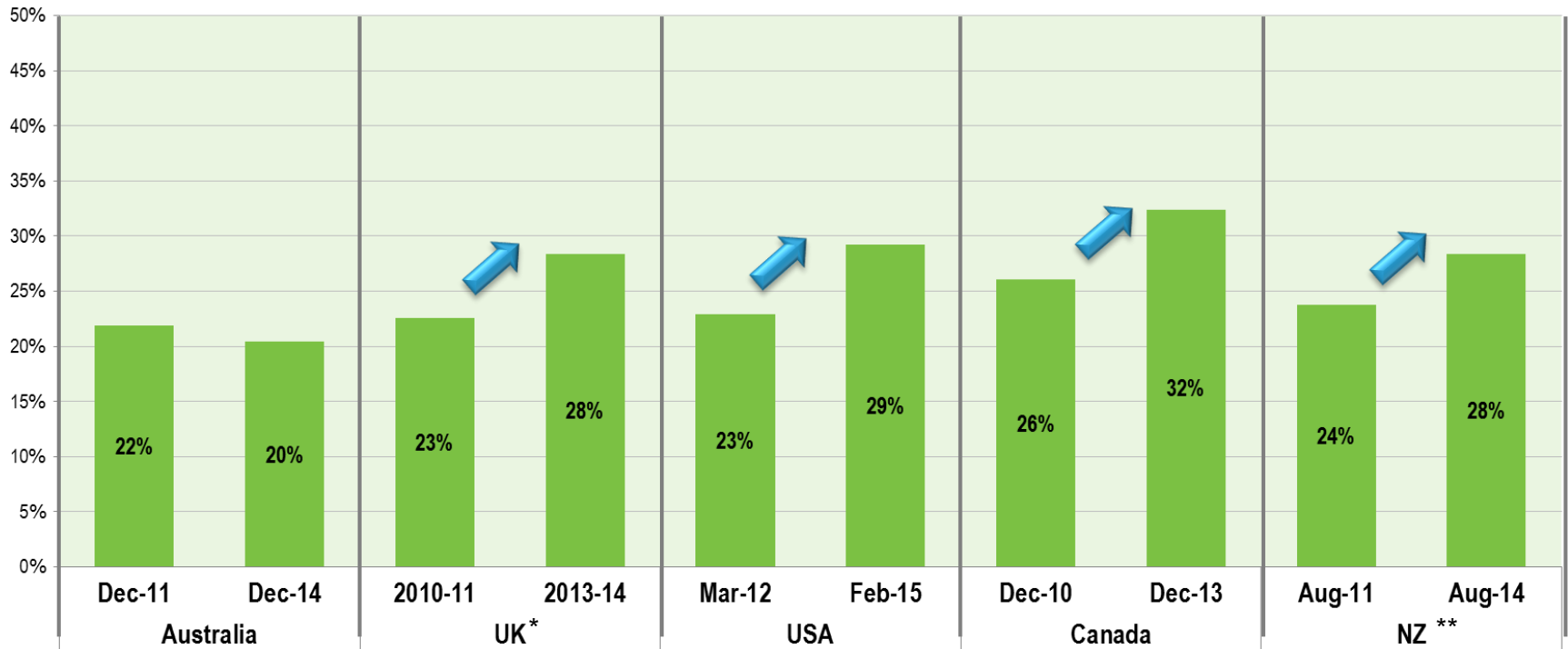
UK* – Higher Education only

NZ** – International fee paying students only; China includes Hong Kong

Sources: Australia: DIBP student visa holders, Canada: CIC – foreign students present, NZ: Export Levy Data – IFP students enrolled
 UK: HESA – HE students enrolled, US: SEVIS – active student visas

Increasing reliance on China as a source market

Proportion of students currently studying in MESC from CHINA 3 year comparison

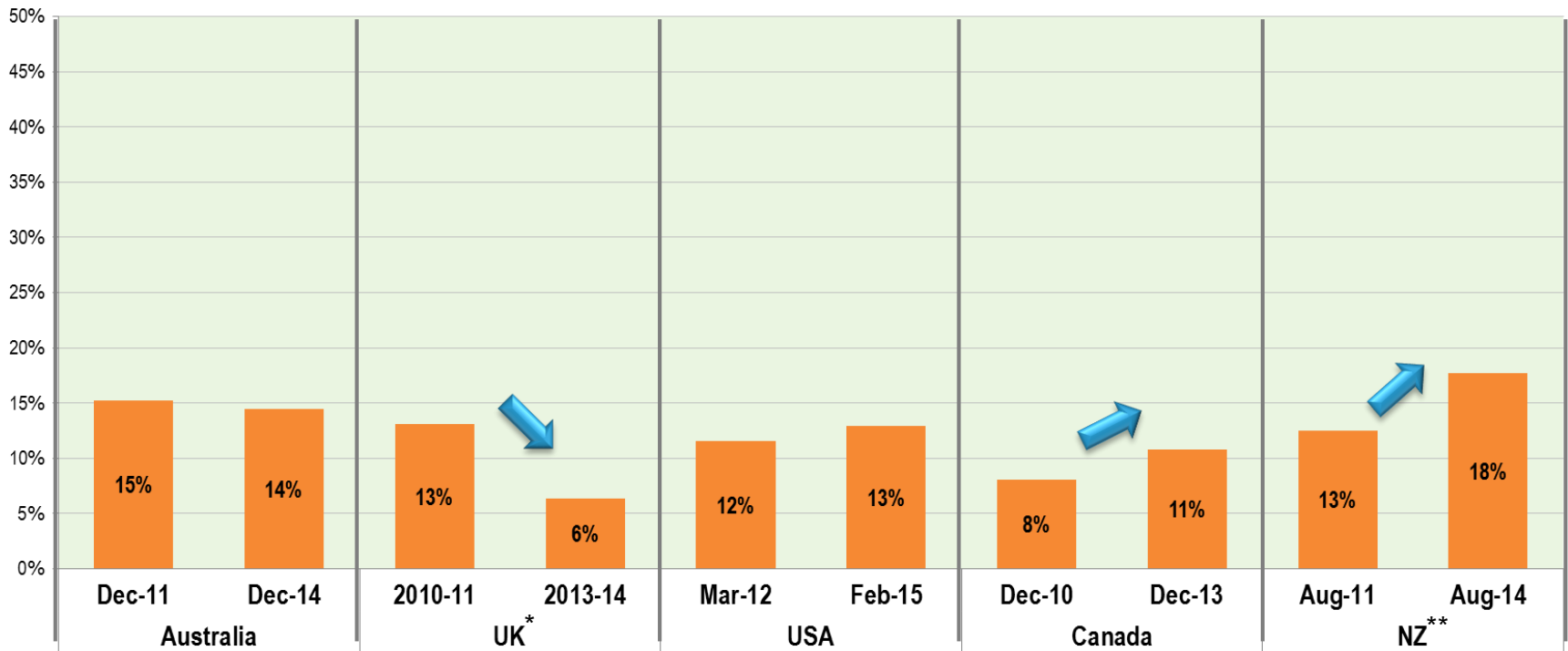


UK* – Higher Education only

NZ** – International fee paying students only; China includes Hong Kong

...and India as a source market varies for destinations

Proportion of students currently studying in MESC from INDIA 3 year comparison



UK* – Higher Education only

NZ** – International fee paying students only; China includes Hong Kong

Sources: Australia: DIBP student visa holders, Canada: CIC – foreign students present, NZ: Export Levy Data – IFP students enrolled
 UK: HESA – HE students enrolled, US: SEVIS – active student visas

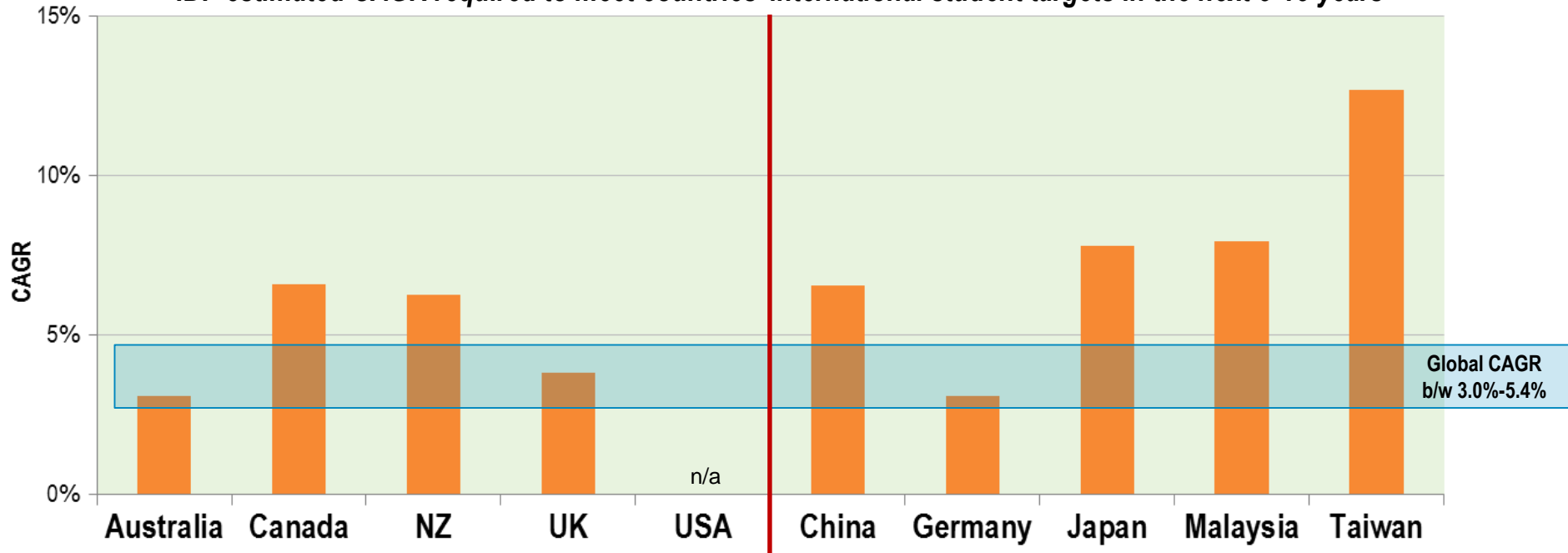
Destination competition and ambitious targets

Country	Target	When
Australia	<ul style="list-style-type: none"> Attract 520k international students 	2020
Canada	<ul style="list-style-type: none"> Double number of international students 	2022
New Zealand	<ul style="list-style-type: none"> Double economic value to \$5b 	2025
UK	<ul style="list-style-type: none"> Increase number of HE international students by 15-20% in 5 years (approx 90k) 	2018
Germany	<ul style="list-style-type: none"> Host 350k foreign university students 	2020
China	<ul style="list-style-type: none"> Attract 500k international students (150k HE) 	2020
Japan	<ul style="list-style-type: none"> Double number of foreign students to 300k 	2020
Malaysia	<ul style="list-style-type: none"> Attract 250k international students 	2025
Taiwan	<ul style="list-style-type: none"> Attract 150k foreign students 	2020

Destination competition: increasing intensity

Emerging markets competing for share

IDP estimated CAGR required to meet countries' international student targets in the next 5-15 years



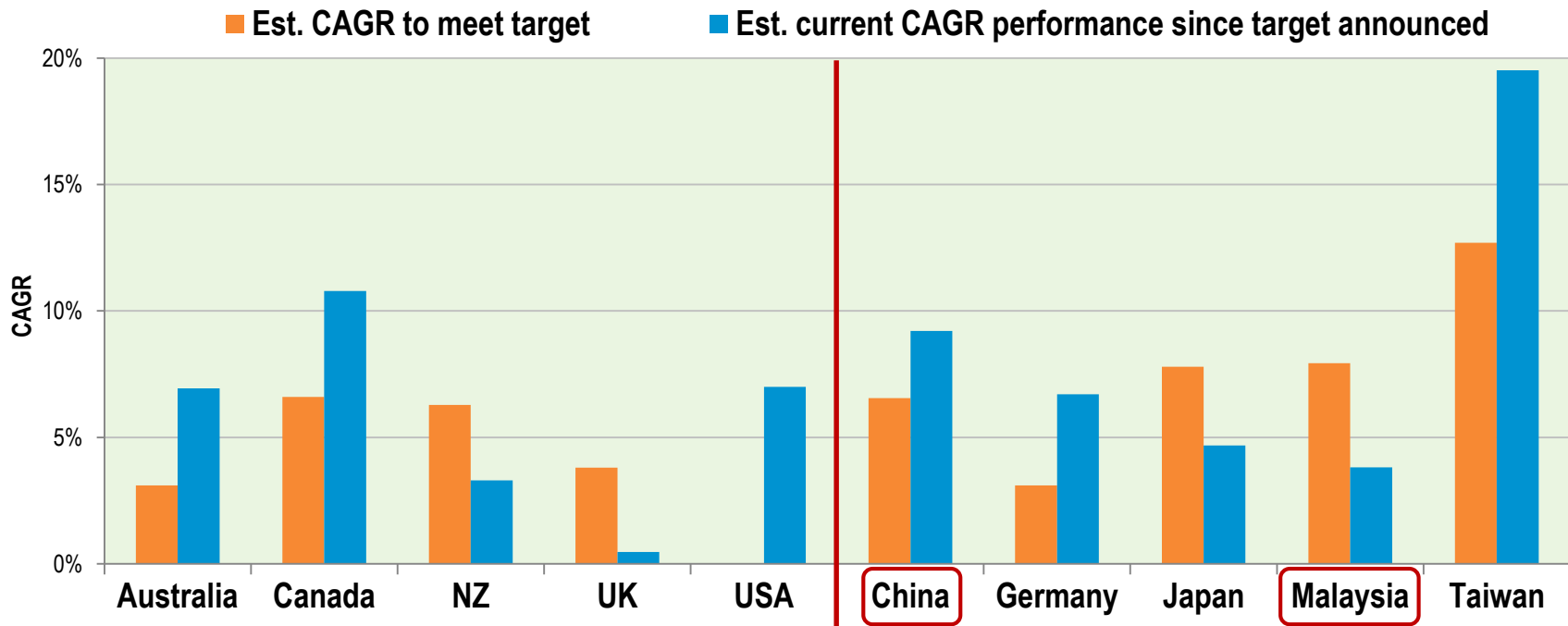
CAGR = compound annual growth rate

*Notes: Global CAGR based on UNESCO 2009 and OECD 2009 estimates of between 5 and 7 million international tertiary students in 2020
For NZ, to estimate CAGR, assumed double number of international students*

Sources: Education Target Reports from each Government - New Zealand, Canada, China, Japan, Malaysia, and Taiwan. Australia – Educating Globally report, UK - International Education: Global Growth and Prosperity, Germany – DAAD's Strategy 2020

Destination growth targets: current status

Estimated CAGR required to meet destination countries' international student targets in the next 5-15 years and current CAGR



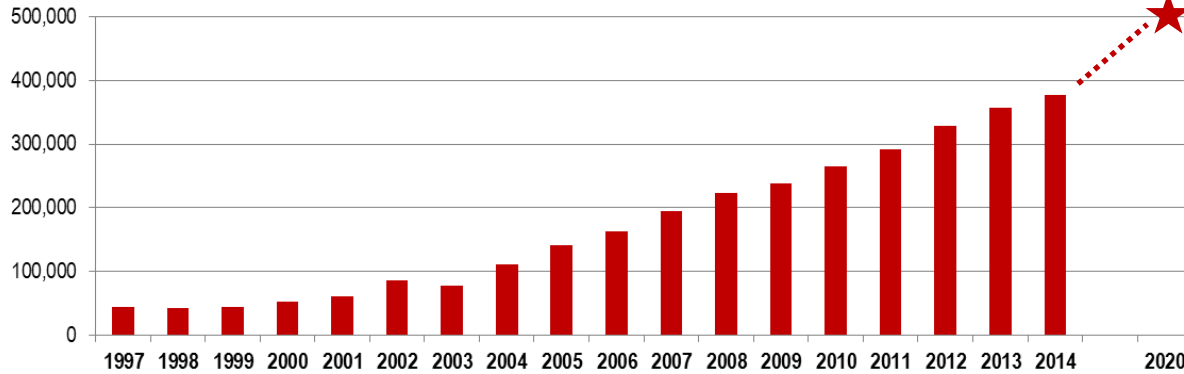
Note: CAGR = compound annual growth rate

Data based on latest annual international student enrolment data
 Sources: Education Target Reports from each Government - New Zealand, Canada, China, Japan, Malaysia, Australia – Educating Globally report, UK - International Education: Global Growth and Prosperity

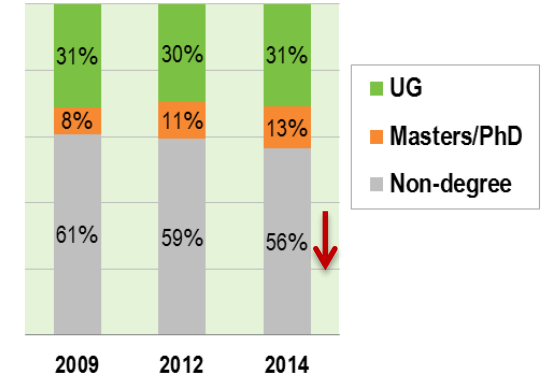


Emerging Destination: China

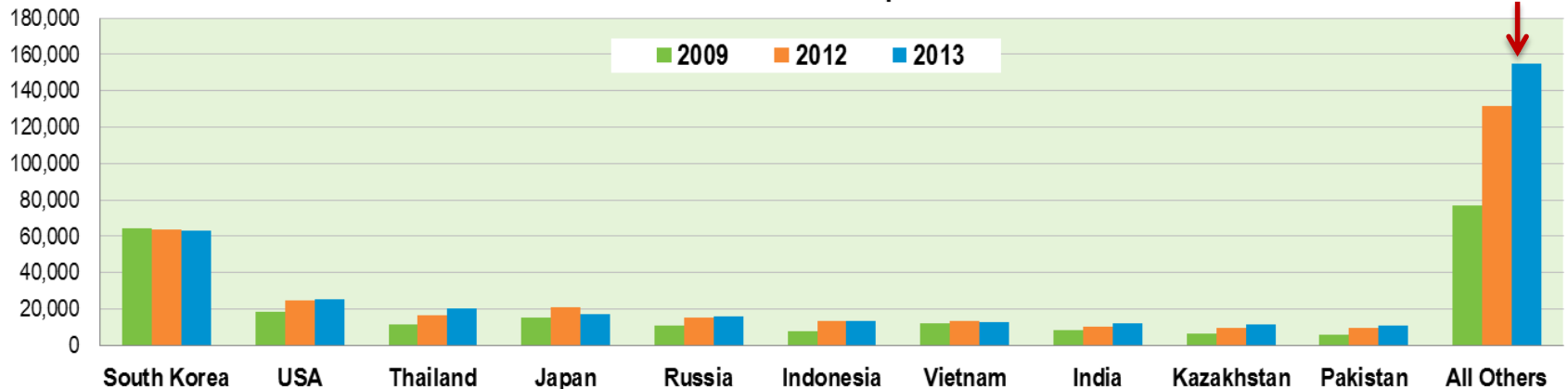
**No. of international students in China
1997-2014**



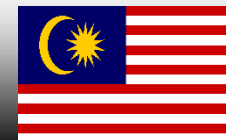
**International Students in China
by Sector**



International Students in China - Top 10 Source Countries

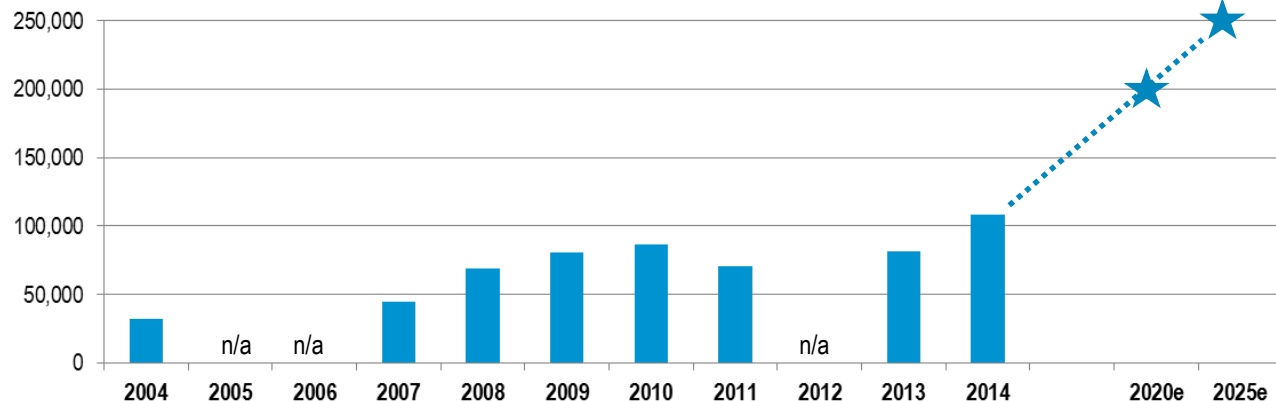


Increasing diversity

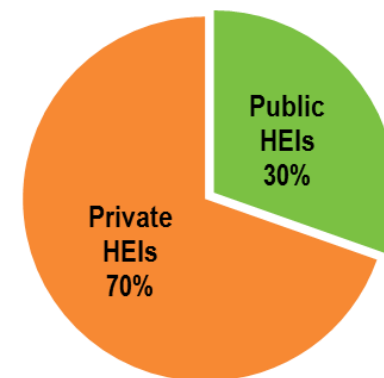


Rising Destination: Malaysia

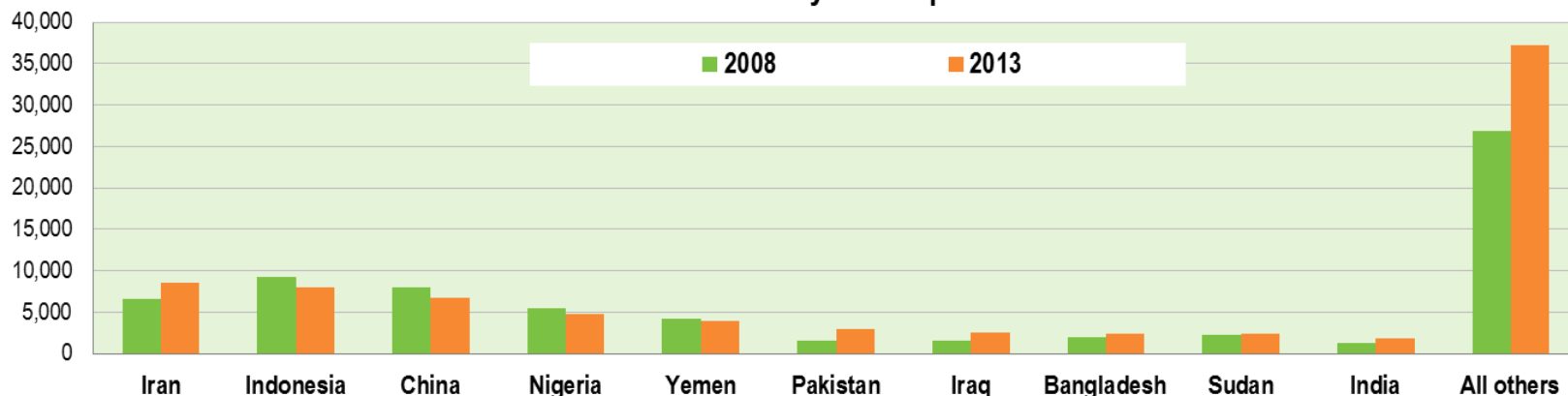
No. of international students in Malaysia 2004-2014



International students in Malaysia by Institution Type - 2014



International Students in Malaysia - Top 10 Source Countries



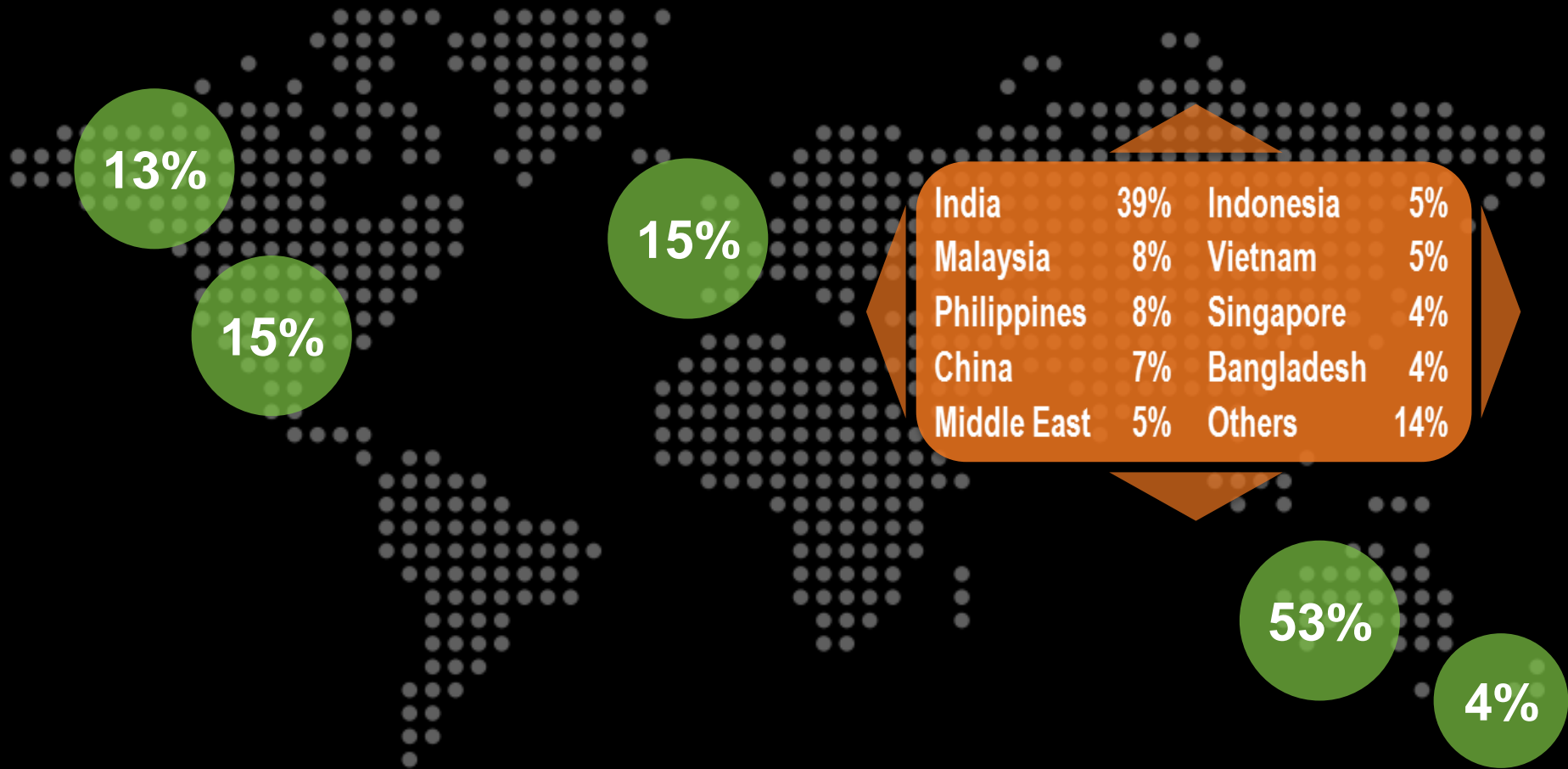


IDP Student Buyer Behaviour Research

Key Findings for Canada

Who responded

- In August 2014, we surveyed online, over 1,000 students who have used IDP services



Survey done in partnership with **forethought** RESEARCH The Knowledge Partnership

Who responded

- In August 2014, we surveyed online, over 1,000 students who have used IDP services



Study Intention

50% Prospective
50% Studying overseas



Study Sector

22% UG
64% PG course/ research
7% Vocational
4% EL/ pathway
3% Other



Broad Field of Study

44% STEM
43% Commerce & Management
10% Health
3% Other



Education Funding

74% My parents
23% Scholarship
22% Myself
11% Other relatives

Multi-response question

Key findings - Canada

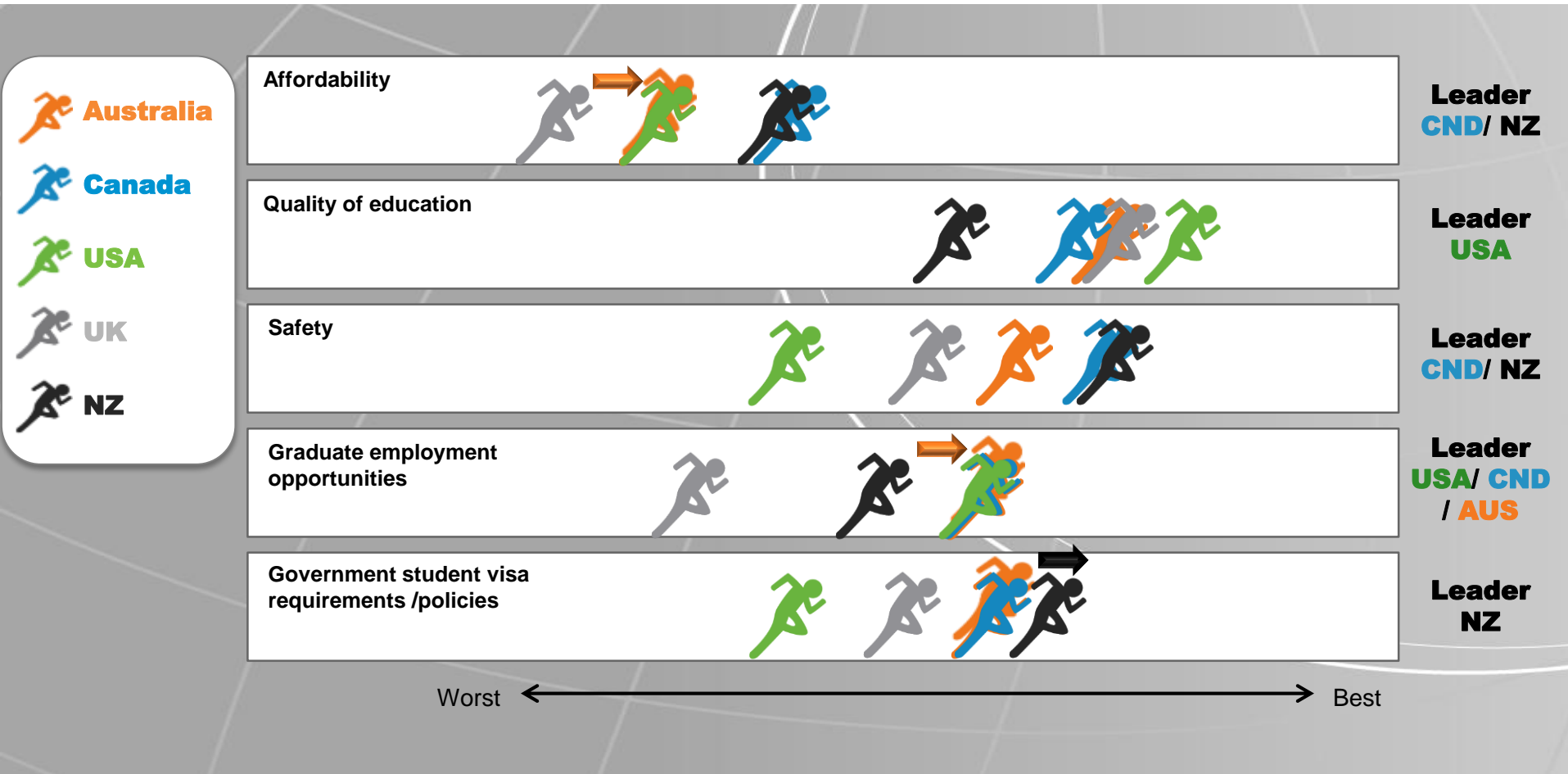
- **Canada's reputation in international education grows**
 - *Experience exceeding expectations for some students*
- **Students want return on their education investment**
 - *Through better skills and knowledge with career outcomes*
- **High career aspirations but students recognise the challenges**
- **International education seen as the pathway for greater career and life opportunities**



IDP student perceptions

IDP student perceptions: Overall

- IDP student perceptions of each destination on the following attributes:

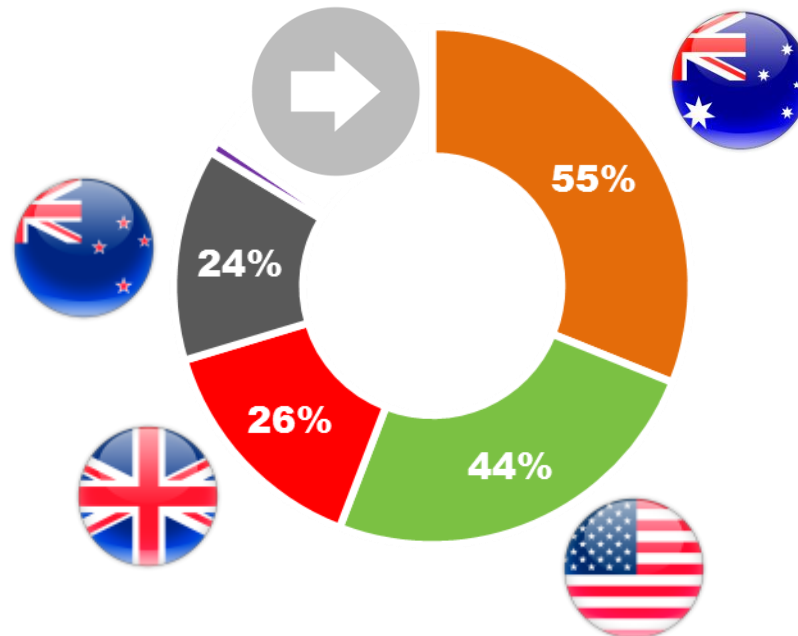


Canada: consideration set

- Nearly 3 in 10 IDP students considered Canada only as a study destination



72% *who considered Canada,
also considered other destinations*



Canada as 1st preference: Why or why not?

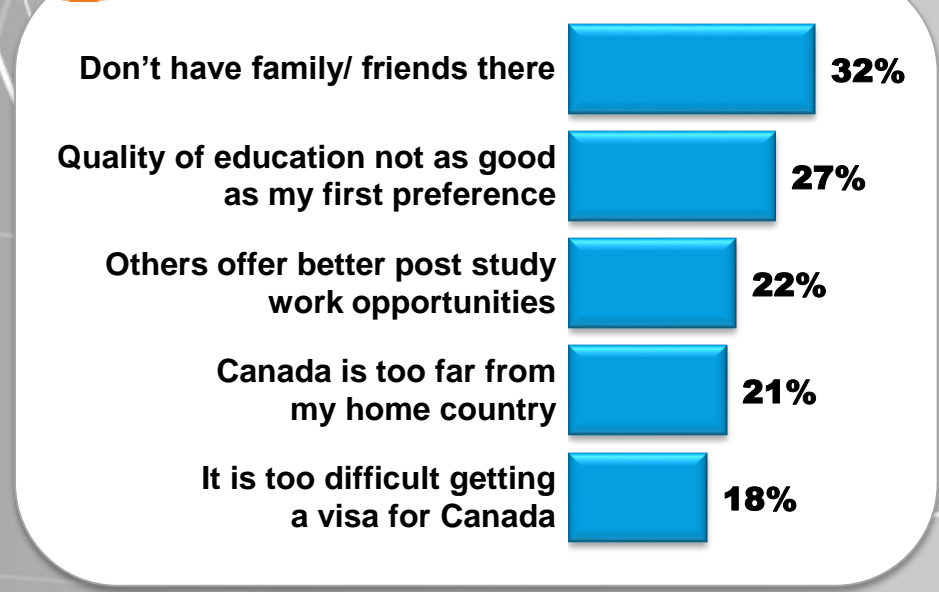
- Academic, lifestyle and experiential factors are all key for Canada as a preferred study destination
- The main reason why Canada was not first preference was lack of friends or family living there

Why? Canada was 1st preference



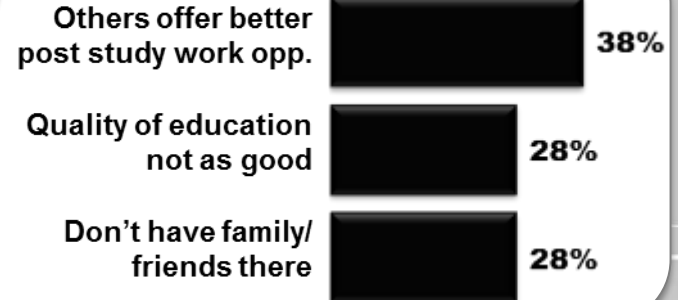
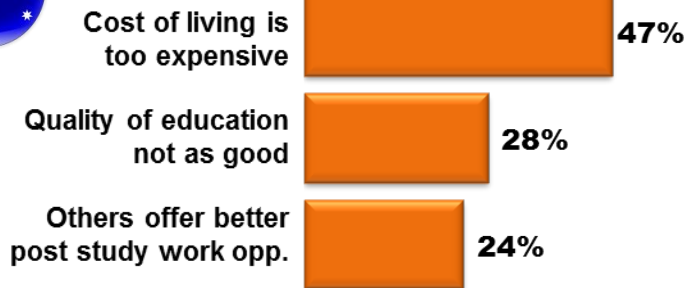
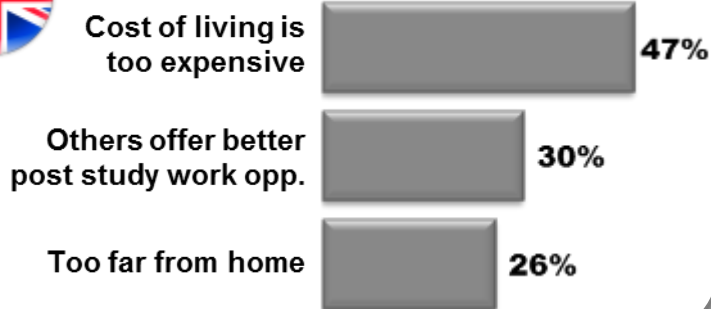
Word cloud compiled using <http://worditout.com>

Why? Canada was not 1st preference



Top 3 reasons why study destination was not 1st preference

- The main reasons why each study destination was not first preference differed by country



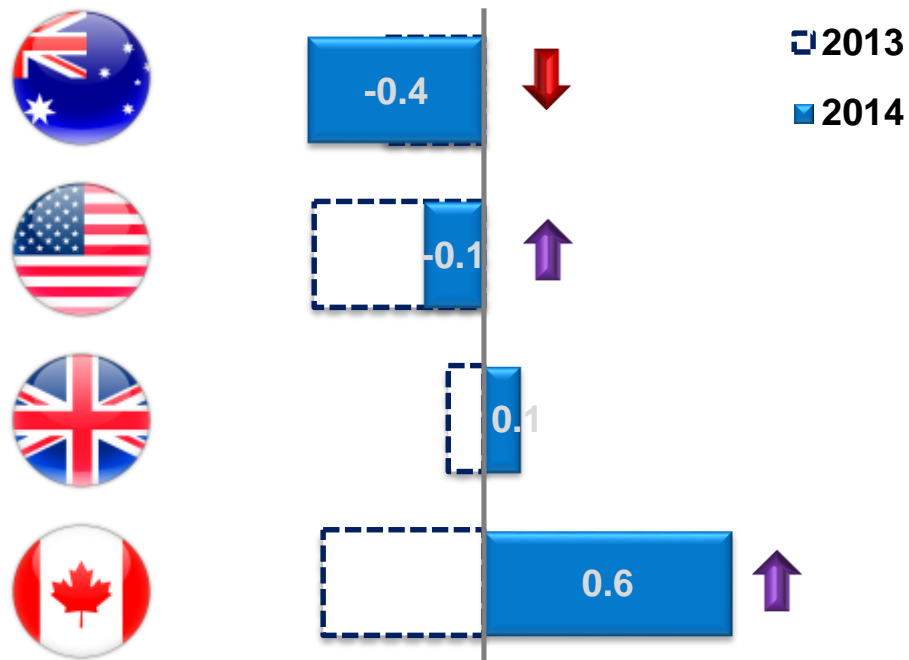


IDP student expectations

Experience vs. expectations

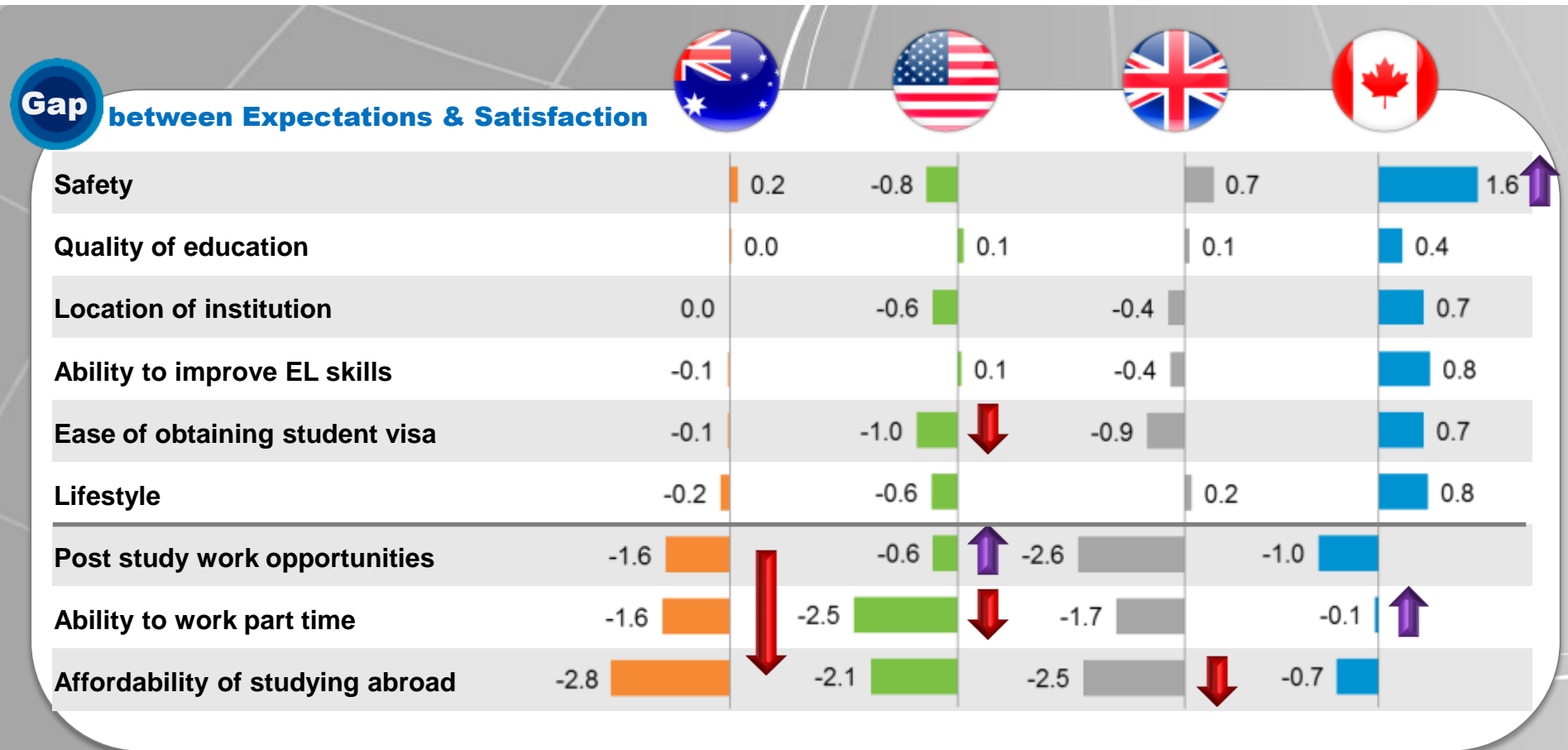
- The Canadian study experience is exceeding expectations
- While the gap between expectations and experience has widened for Australia, and narrowed for the USA

Gap between Expectations & Satisfaction



Experience vs. expectations

- Canada exceeds expectations as a study destination across the basic and lifestyle needs





International education: Is the cost worth it?

International Education: Why is it worth the cost?

- Comments from Canadian bound students on why international education is worth the cost...



*“Experiencing a **new life** in an alien environment is the key factor when deciding to study abroad. With the new experiences people can view and **understand this world differently**, often in a better way.”*

Student from China

*“The opportunities we get after graduating and the degree being **recognized worldwide**; most importantly there shall be **no discrimination**.”*

Student from UAE

*“...we gain more knowledge, face multiple **challenges** which help to **face reality** and provide the necessities for our family. **No pain, no gain!**”*

Student from Malaysia

*“The **excellent education** that one receives along with international exposure and **research facilities** make international education worth what it is paid for...”*

Student from India

*“...help me to **improve my English** and widen my experience too...”*

Student from Vietnam

International Education: Measuring success

- Students indicated they assess “value” of an international education based on the course and how it contributes to employment outcomes

Rank order



Gain better knowledge/ skills than at home

40% Ranked #1



Get a good job in chosen field



Can earn more money



Improve English-language skills



Get expected academic marks / results

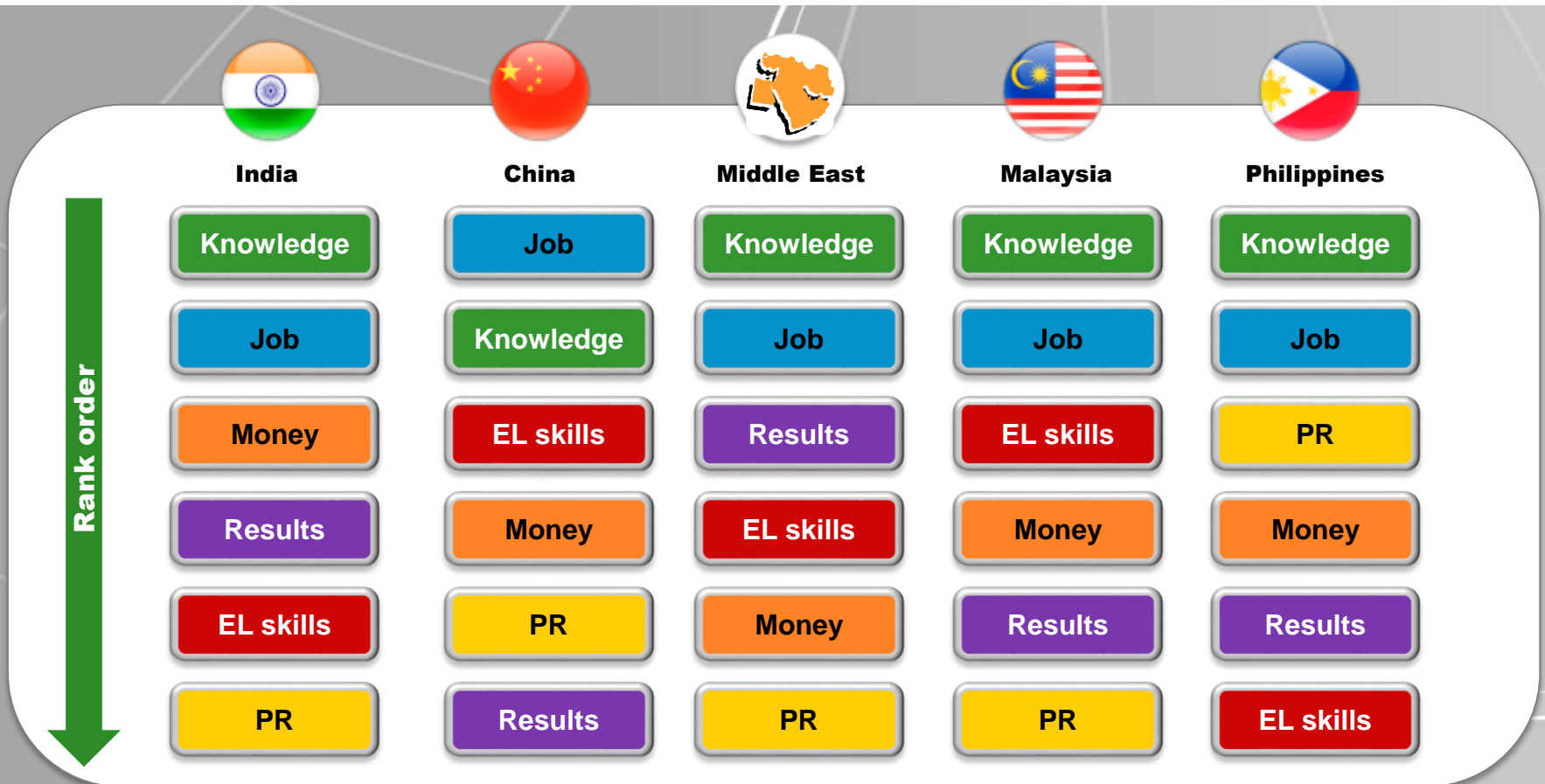


Can live in study destination permanently



International Education: Measuring success

- The measure of value of an international education differs depending on where students are from...

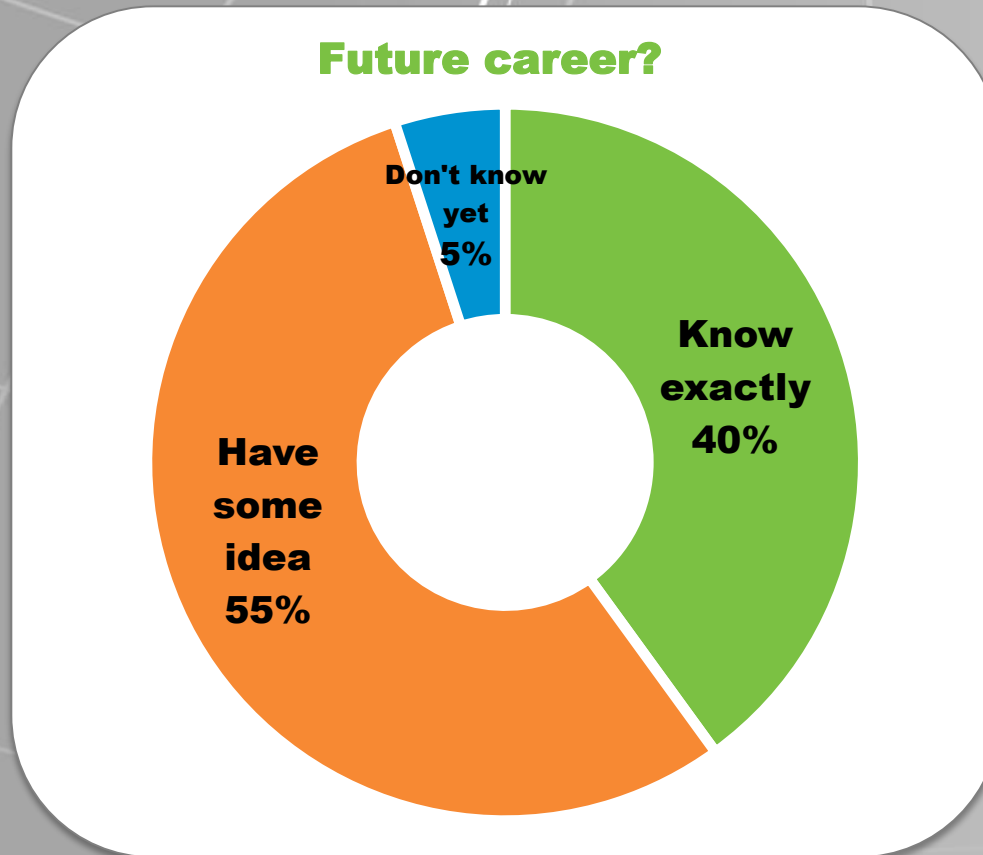




IDP students and their career expectations

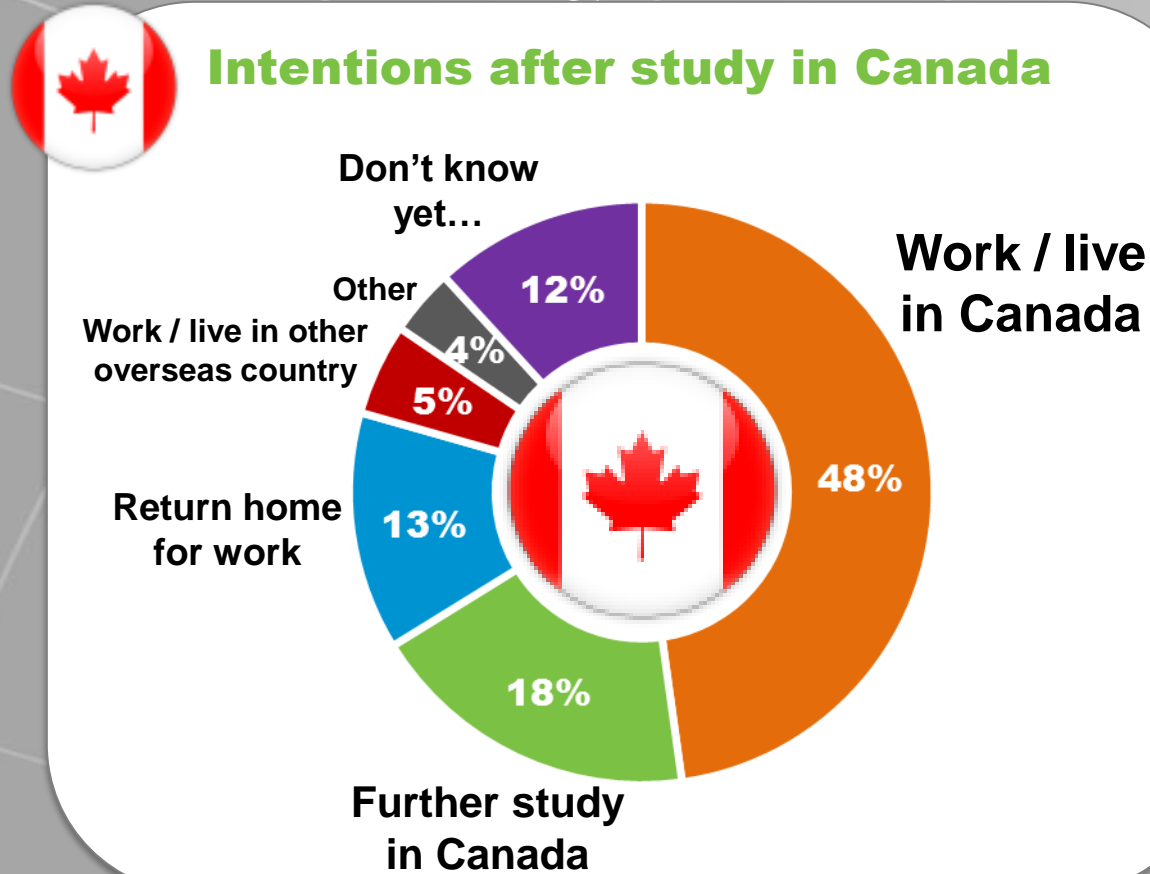
Career intentions

- 95% of students surveyed have at least some idea of their future career; 40% know exactly what they want to do



Intentions: After study in Canada

- Almost half of the students who are Canada bound hope to gain work experience in Canada.

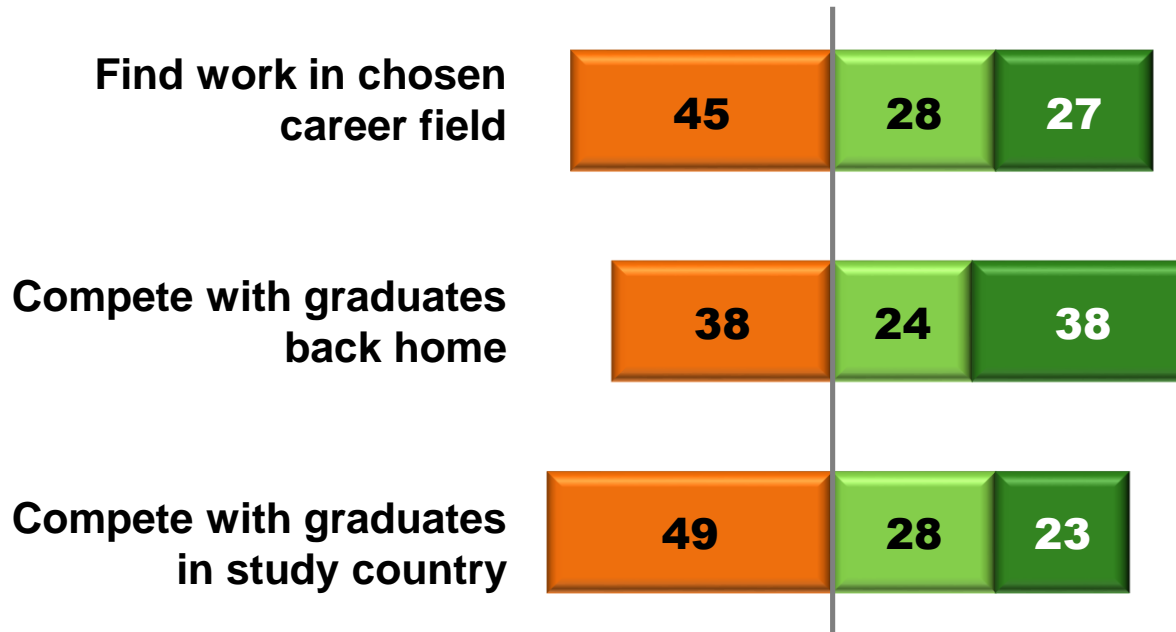


Expectations of getting a career-related job

- Nearly half of those surveyed said that it would not be easy to find work in the chosen career field

Perceived ease of a career-related job

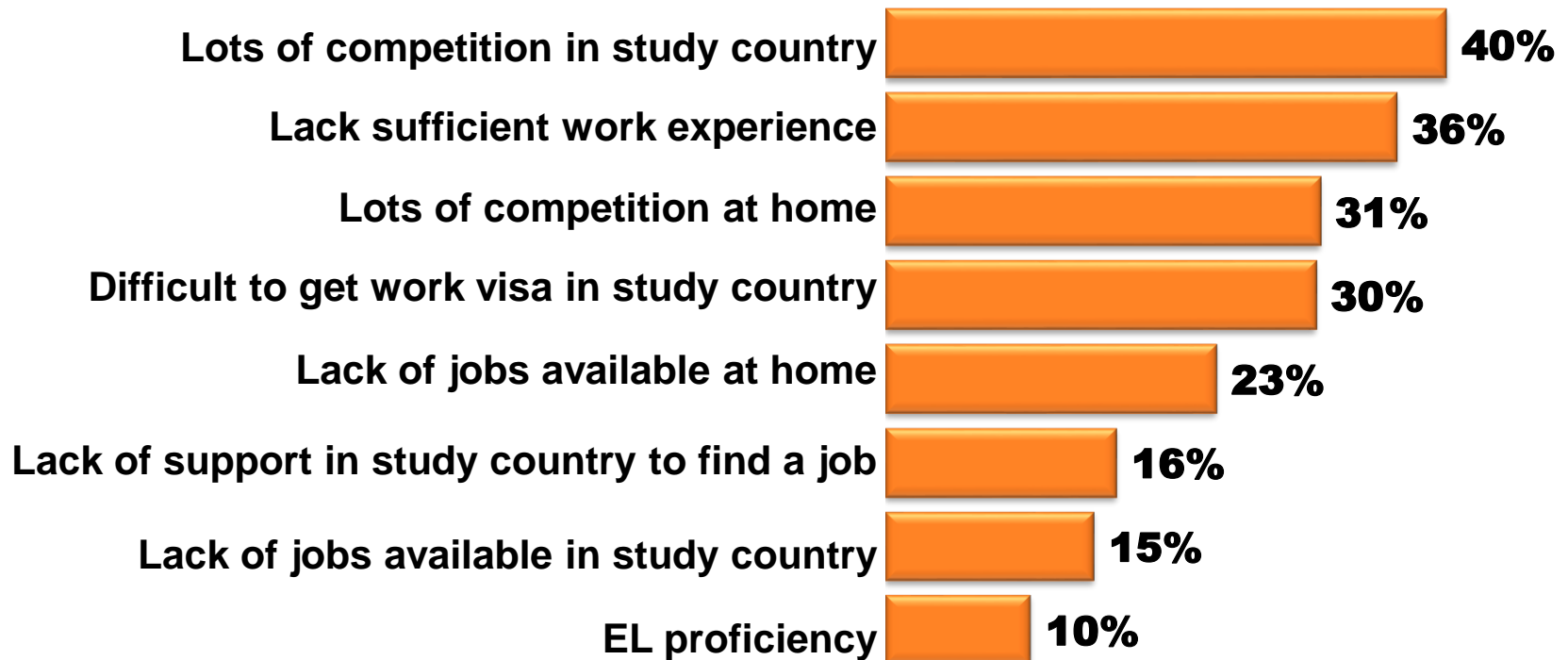
■ % Not easy ■ % Somewhat easy ■ % Easy



Barriers to getting a career-related job

- Competition is a key barrier to getting a career-related job, followed by lack of sufficient work experience and work visa difficulties

Why **It will not be easy finding work in chosen career field?**

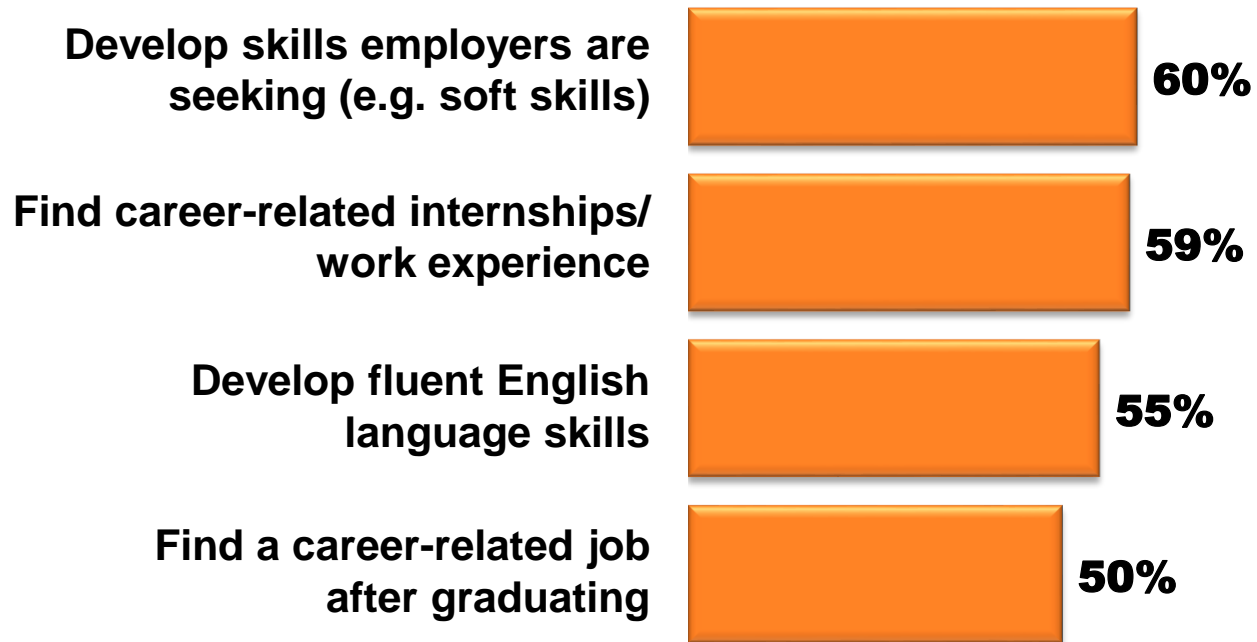


Career Support: Role of institutions

- At least half of the students surveyed expect institution involvement in providing career support

Expectations of career support by institution

% Agree



Reality of getting a career-related job



Australian international graduates and the transition to employment

- This report investigated the recruitment of Australian international graduates in the areas of accounting, nursing and engineering. It presents the findings from the three-year study from different perspectives - universities, students, industry groups and employers.
- The research project is the result of a partnership between Deakin University and University of Technology Sydney (UTS) researchers funded by IDP Education Ltd and the Australian Research Council.
- To download the report, refer to...
<http://www.deakin.edu.au/research/src/crefi/document/s/international-graduates-employment.pdf>

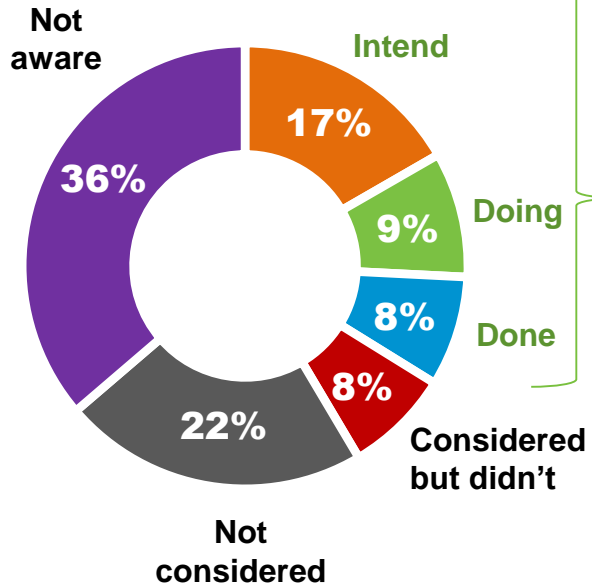


Attitudes towards International Education

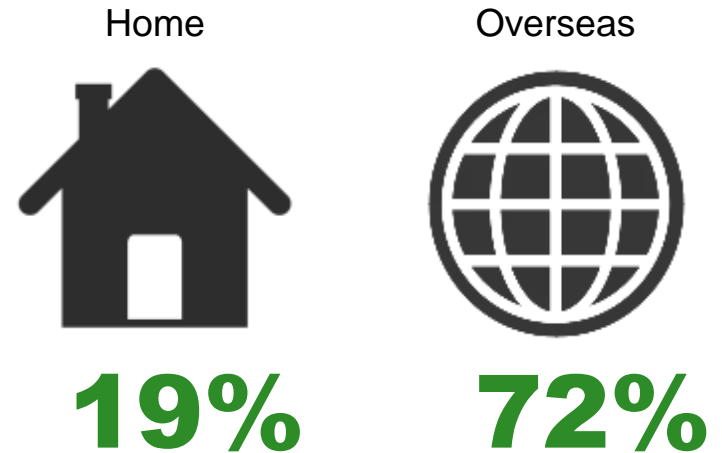
Pathway programs

- About one third of IDP students either intend, are doing or have completed a pathway

Experience of Pathways



Where?



Survey Descriptor:

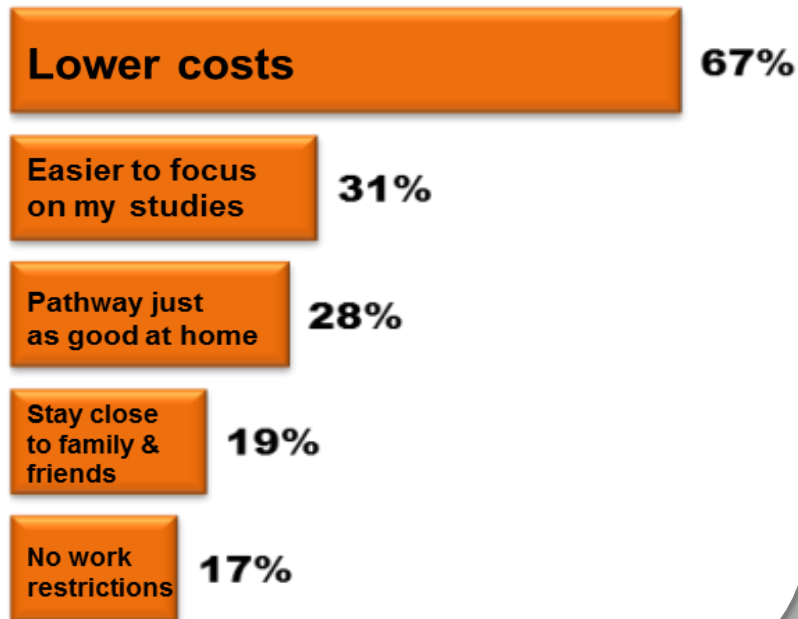
Pathway programs and courses help prepare for university (e.g. Foundation Year, English-language course or a Diploma).

Pathway programs

- The lower cost of study and living was the primary reason for students to complete a pathway program in their home country.



Why do a pathway at home?



Why do a pathway overseas?



Survey Descriptor:

Pathway programs and courses help prepare for university (e.g. Foundation Year, English-language course or a Diploma).

International Education attitudes: benchmark

- These attitudes of international students will be monitored over time...

Study preferences: % Agree

■ Disagree ■ Somewhat agree ■ Strongly agree

Employers at home **value international degrees** more than local degrees



Quality of HE institutions at **home** is **improving**



Most of my friends **prefer** to study at a HE institution **at home** rather than overseas



I've **never considered** studying at a HE institution at home





Thank you

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uri.carnat@idp.com