



PRESENTATION

International education past and present: Interpreting trends for the future

Markus Badde

CEO, ICEF

BCCIE Summer Conference, June 18, 2018



ICEF

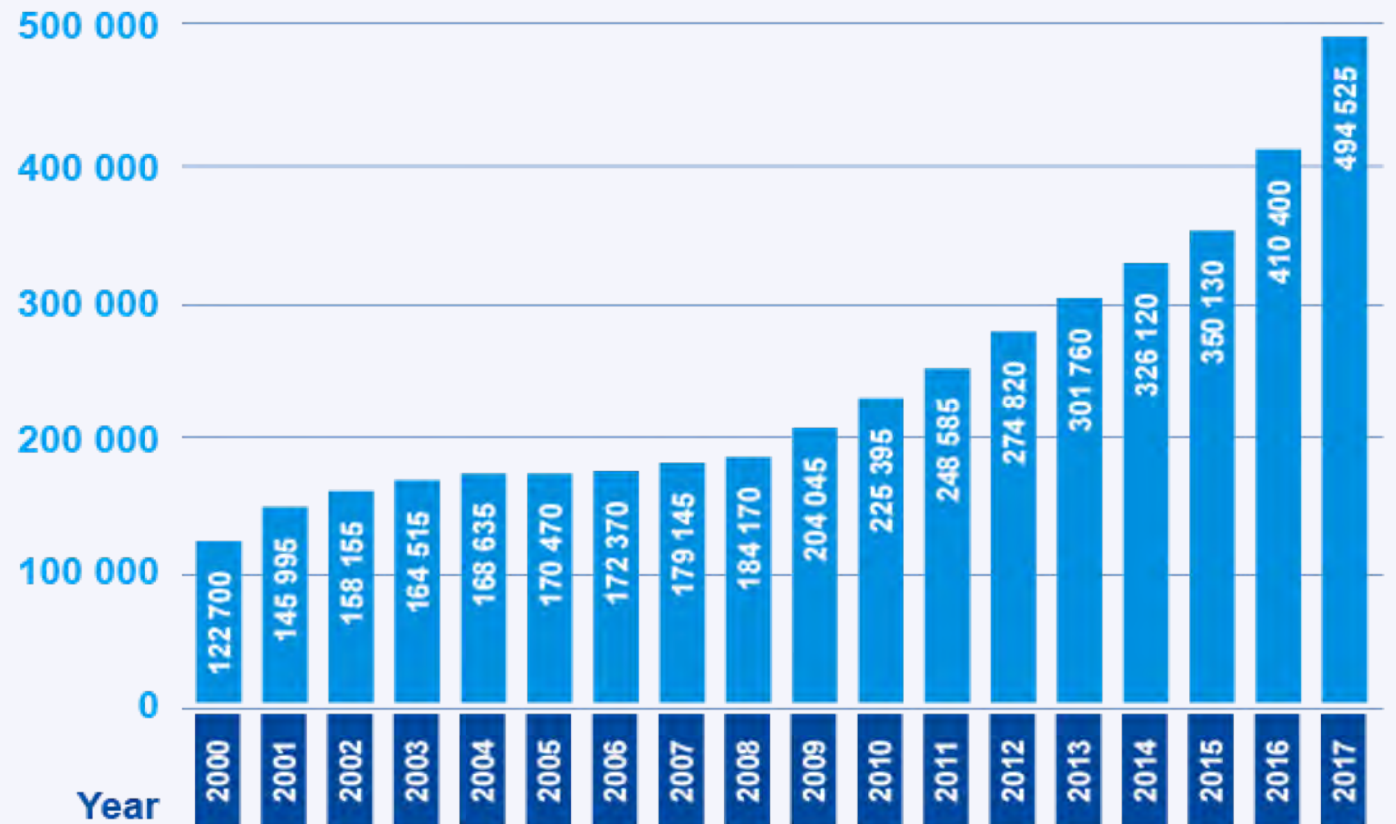
Connect. Recruit. Grow.

Congratulations Canada



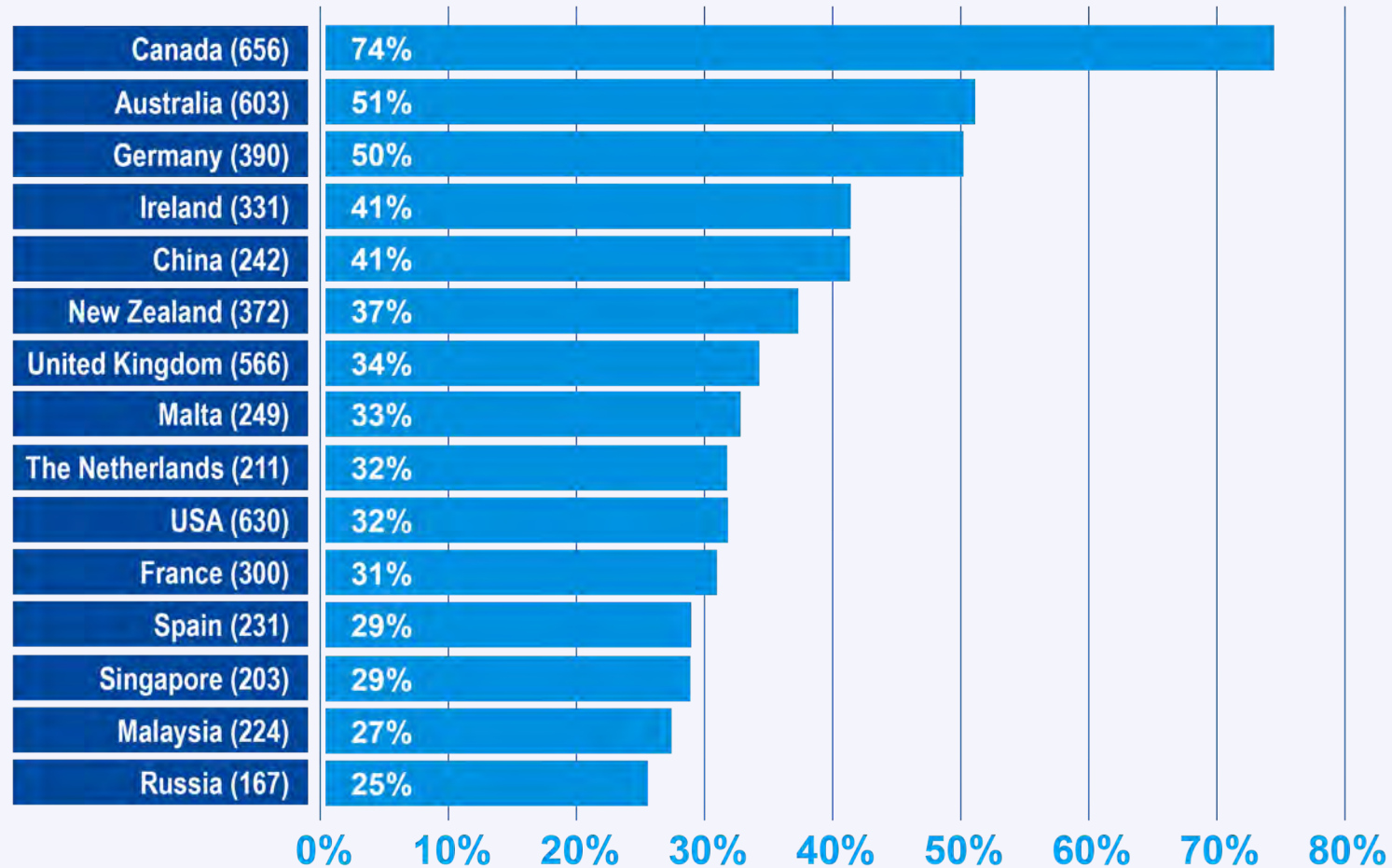
Where Canada is now

- Canada hosted a record 494 525 int'l students in 2017
- 20% growth over 2016
- 303% growth over 2000
- Reached enrolment target a full five years ahead of schedule!
- 28% more study permits in Q1 of 2018 than in the same period last year



Source: IRCC Number of international students in Canada, 2000-2017

Growing interest



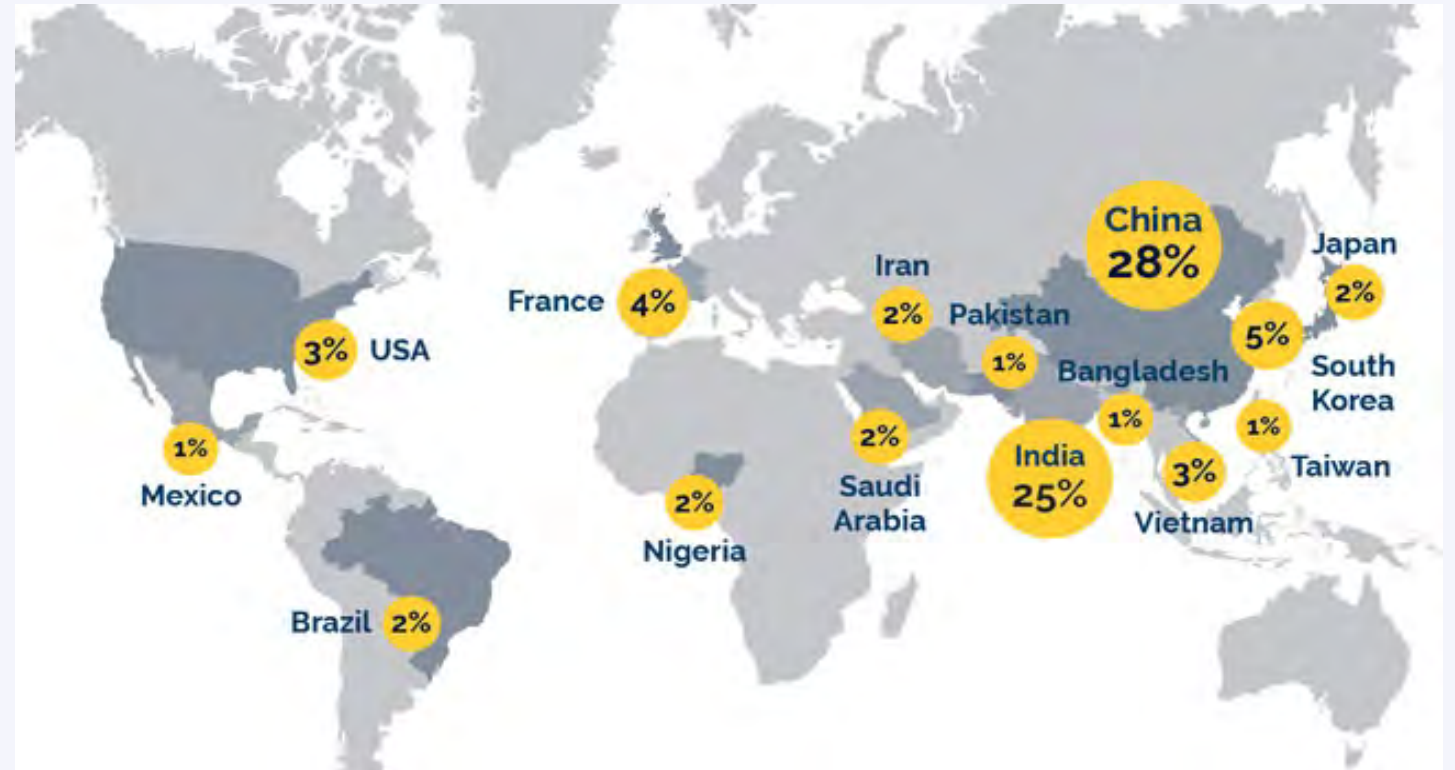
A measure of increasing student interest in selected study destinations as reported by agents. Source: ICEF i-graduate Agent Barometer 2017

“Only when the tide goes out do you discover who's been swimming naked”



Where students come from

- 53% come from China & India
- China is slowing (33% in 2015, 32% in 2016 and 28% in 2017)
- Fastest-growing markets 2017:
Vietnam (+89%)
India (+63%)
Iran (+45%)



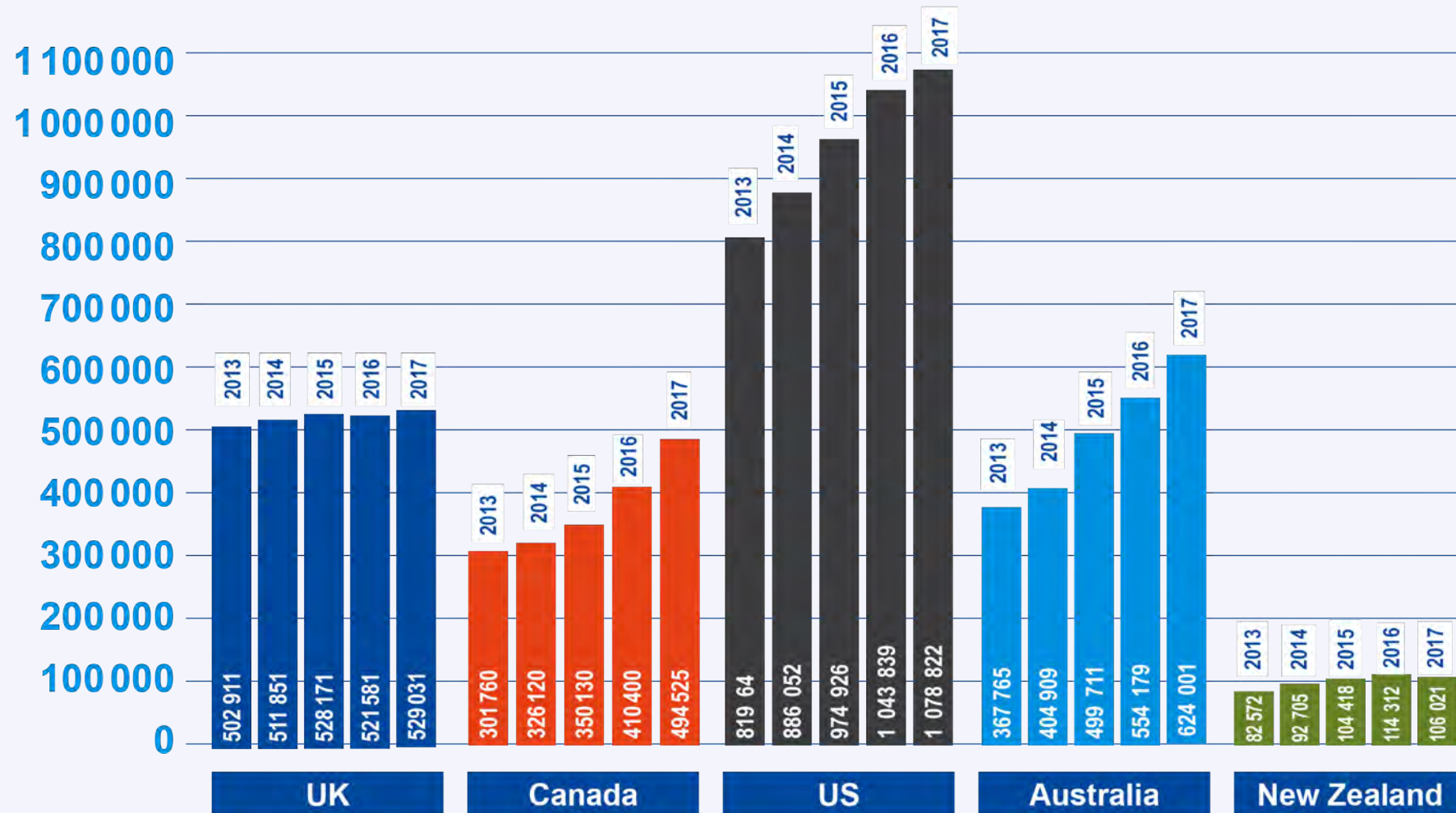
Major sending markets for international students in Canada, 2017. Source: CBIE

Evolution of numbers by province

Provinces	2013		2014		2015		2016		2017	
Ontario	129,085	43%	139,510	43%	151,275	43%	186,285	45%	237,280	48%
British Columbia	86,220	29%	93,170	29%	94,835	27%	104,270	25%	119,110	24%
Quebec	42,080	14%	46,810	14%	49,805	14%	54,730	13%	61,565	12%
Manitoba	6,660	2%	7,625	2%	9,970	3%	12,845	3%	16,075	3%
Nova Scotia	9,195	3%	9,340	3%	10,395	3%	11,770	3%	13,395	3%
Alberta	16,835	6%	17,365	5%	19,575	6%	23,410	6%	26,255	5%
Saskatchewan	4,665	2%	4,900	2%	5,840	2%	7,045	2%	8,005	2%
New Brunswick	3,825	1%	3,935	1%	4,160	1%	4,460	1%	4,865	1%
Newfoundland and Labrador	2,010	1%	2,240	1%	2,665	1%	3,225	1%	3,695	1%
Prince Edward Island	845	0%	1,050	0%	1,430	0%	1,965	0%	2,490	1%
Total	301,760	100%	326,120	100%	350,130	100%	410,400	100%	494,525	100%

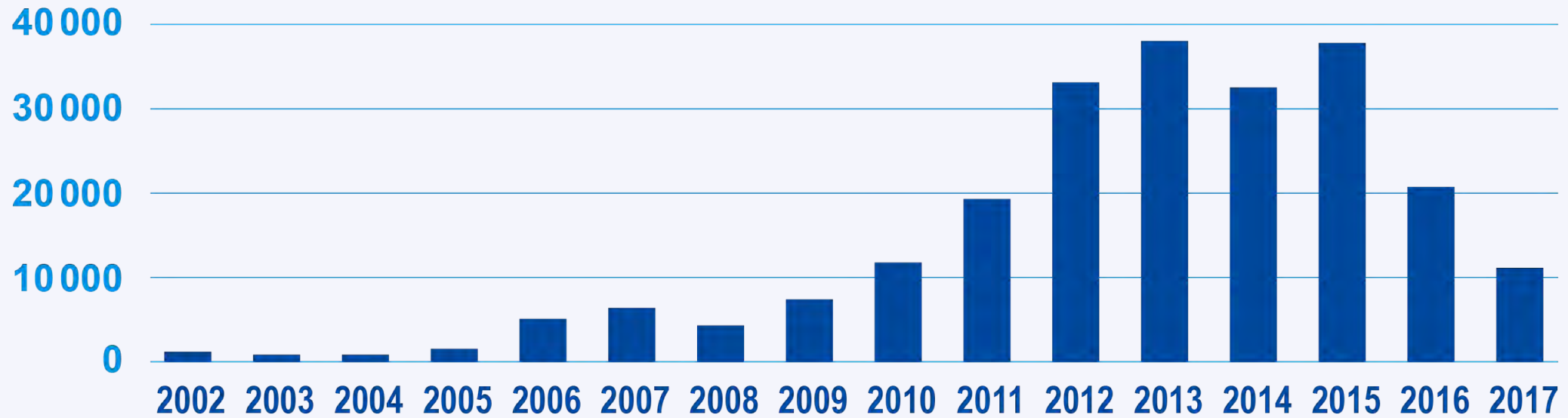
International students in Canada by province. Source: IRCC

An interesting comparison



Source: ICEF Monitor 2018

US IEP's - what goes up must come down

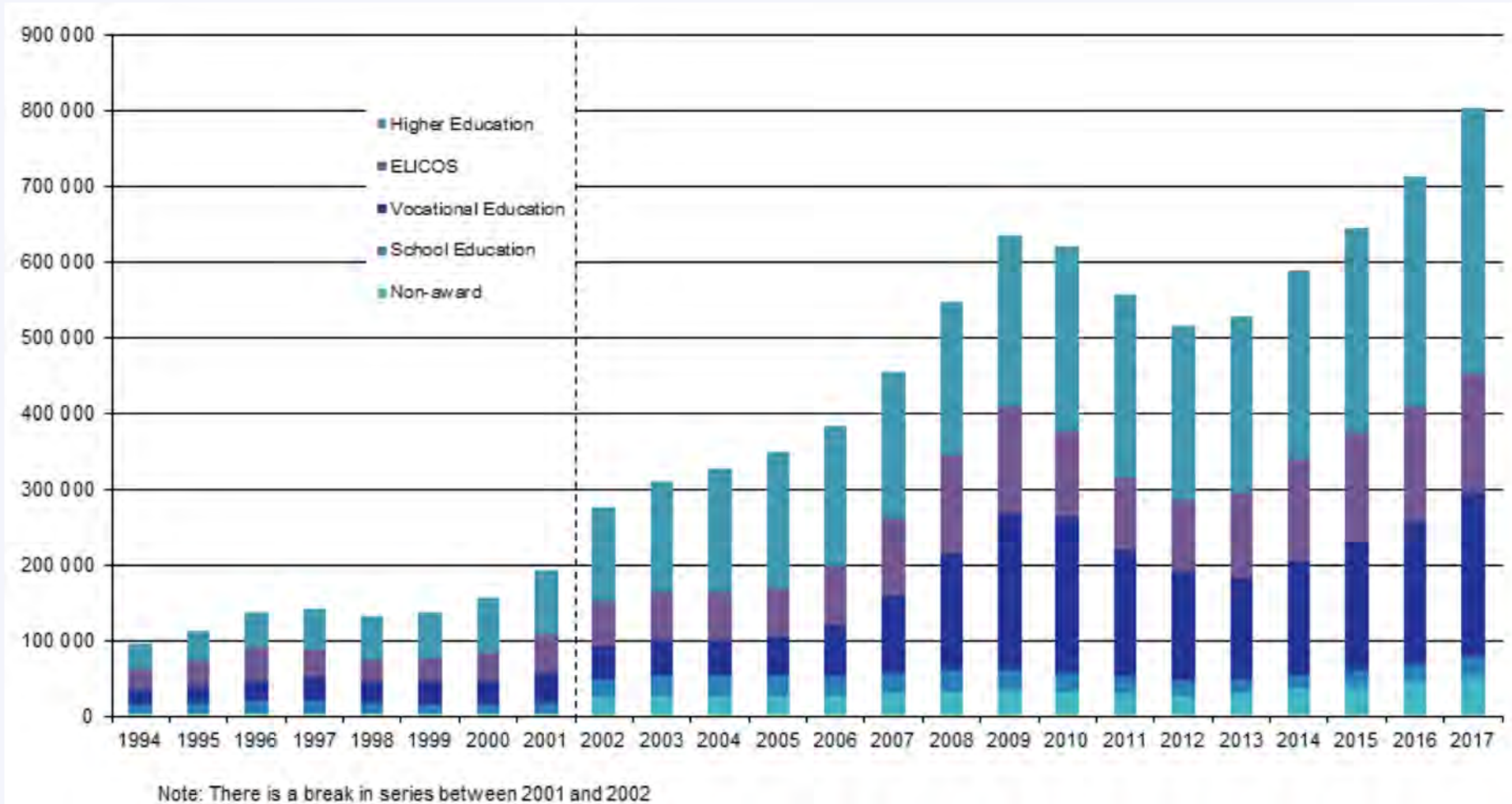


Saudi Arabian student enrolment in US IEPs, 2002–2017. Source: IIE

A story from a land down under



Australian evolution 1994-2017

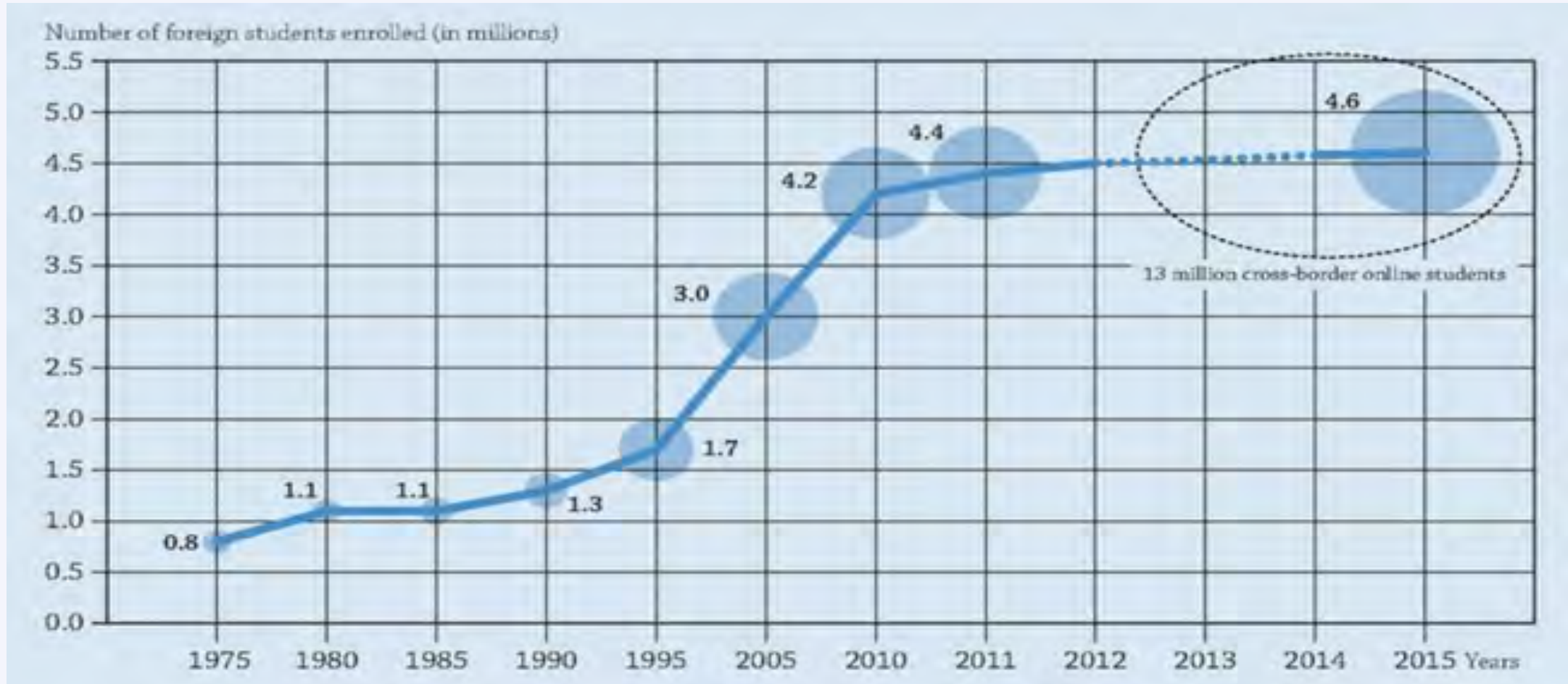


Source: Australian Education International 2018





Slowing overall growth



Growth in foreign enrolment in tertiary education worldwide, 1975-2015. Source: OECD

A global power shift



The future is now



Emerging markets growing fast

Year	2016		2030		2050
China	1	—	1	—	1
United States	2	—	2	▼	3
India	3	—	3	▲	2
Japan	4	—	4	▼	8
Germany	5	▼	7	▼	9
Russia	6	—	6	—	6
Brazil	7	▼	8	▲	5
Indonesia	8	▲	5	▲	4
United Kingdom	9	▼	10	—	10
France	10	▼	11	▼	12
Mexico	11	▲	9	▲	7
Italy	12	▼	15	▼	21
South Korea	13	▼	14	▼	18
Turkey	14	▲	12	▲	11
Saudi Arabia	15	▲	13	—	13
Spain	16	▼	17	▼	26
Canada	17	▼	18	▼	22
Iran	18	▲	16	▲	17
Australia	19	▼	23	▼	28
Thailand	20	▼	22	▼	25

- **E7 going up:**

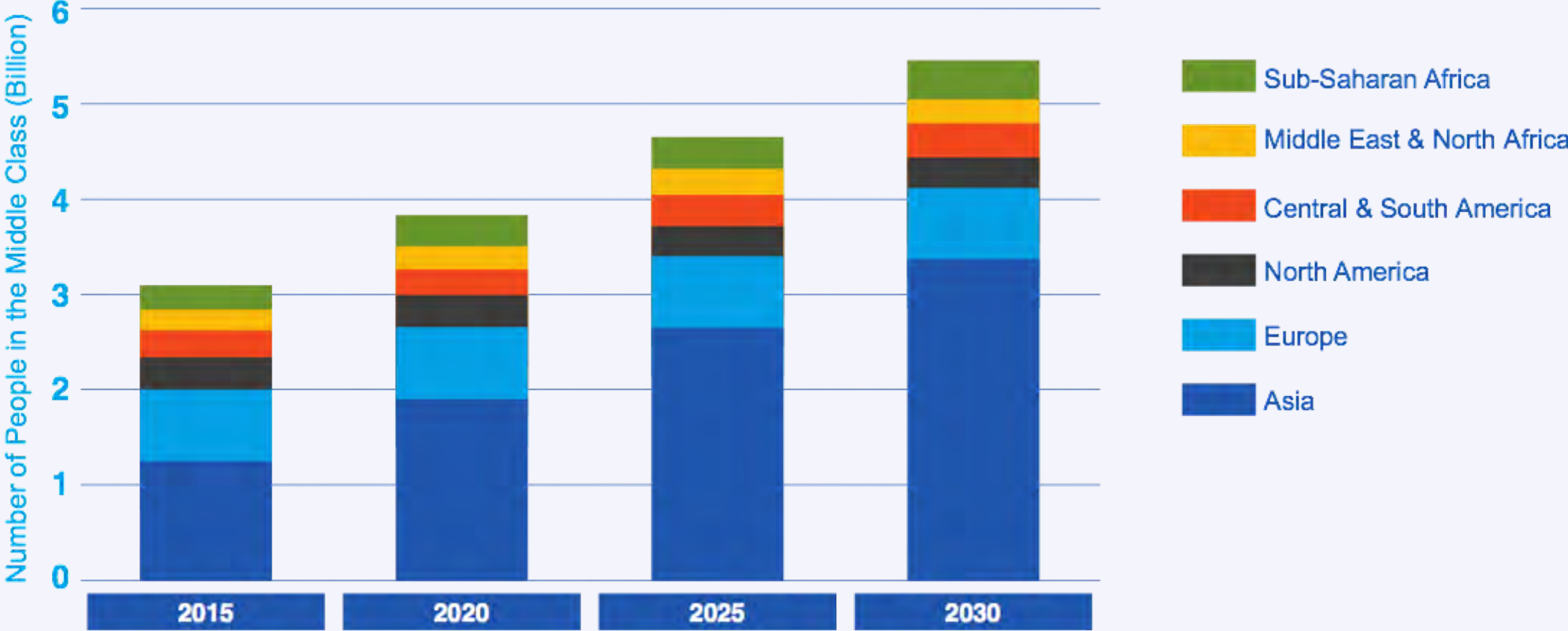
China, India, Brazil, Russia, Indonesia, Mexico, Turkey

- **G7 going down:**

US, Japan, Germany, UK, France, Italy, Canada

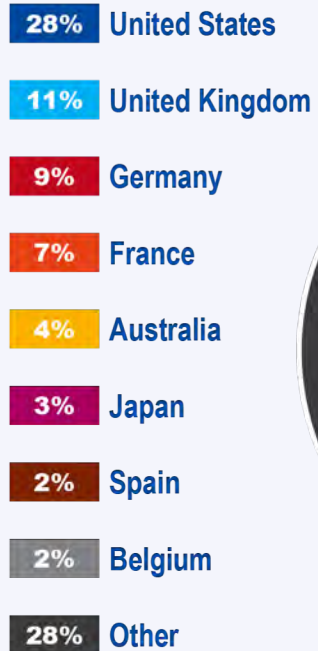
Projected GDP rankings (at PPPs). Sources: IMF for 2016 estimates, PwC projections for 2030 and 2050.

Exponential middle class growth

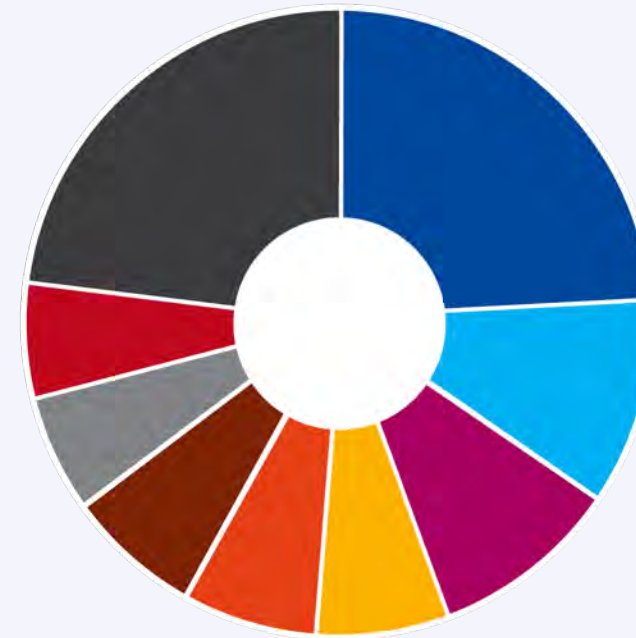


Source: Brookings Institution, February 2017

Competing for share



2011
2.1 million students



2017
4.6+ million students

*Global market share of internationally mobile students for leading study destinations, 2001 and 2017.
Source: Project Atlas, 2017; ICEF Monitor.*

Intensified global competition



720 000 onshore enrolments by 2025

Australia



450 000 international students by 2022

Canada



500 000 international students by 2020

China



44 000 foreign students by 2019/20

Ireland



Increase international student intake by 20% (amounting to 470 000 based on current levels)

France



350 000 inbound internationally mobile students by 2020

Germany



300 000 international students by 2020

Japan



200 000 foreign students by 2023

South Korea



143 000 international students by 2025

New Zealand



58 000 foreign students by 2019

Taiwan



250 000 international students by 2025

Malaysia

Selected international student recruitment targets. Source: British Council 2017

Technological Change



How to avoid exposure



Maximisation



Diversification



Differentiation



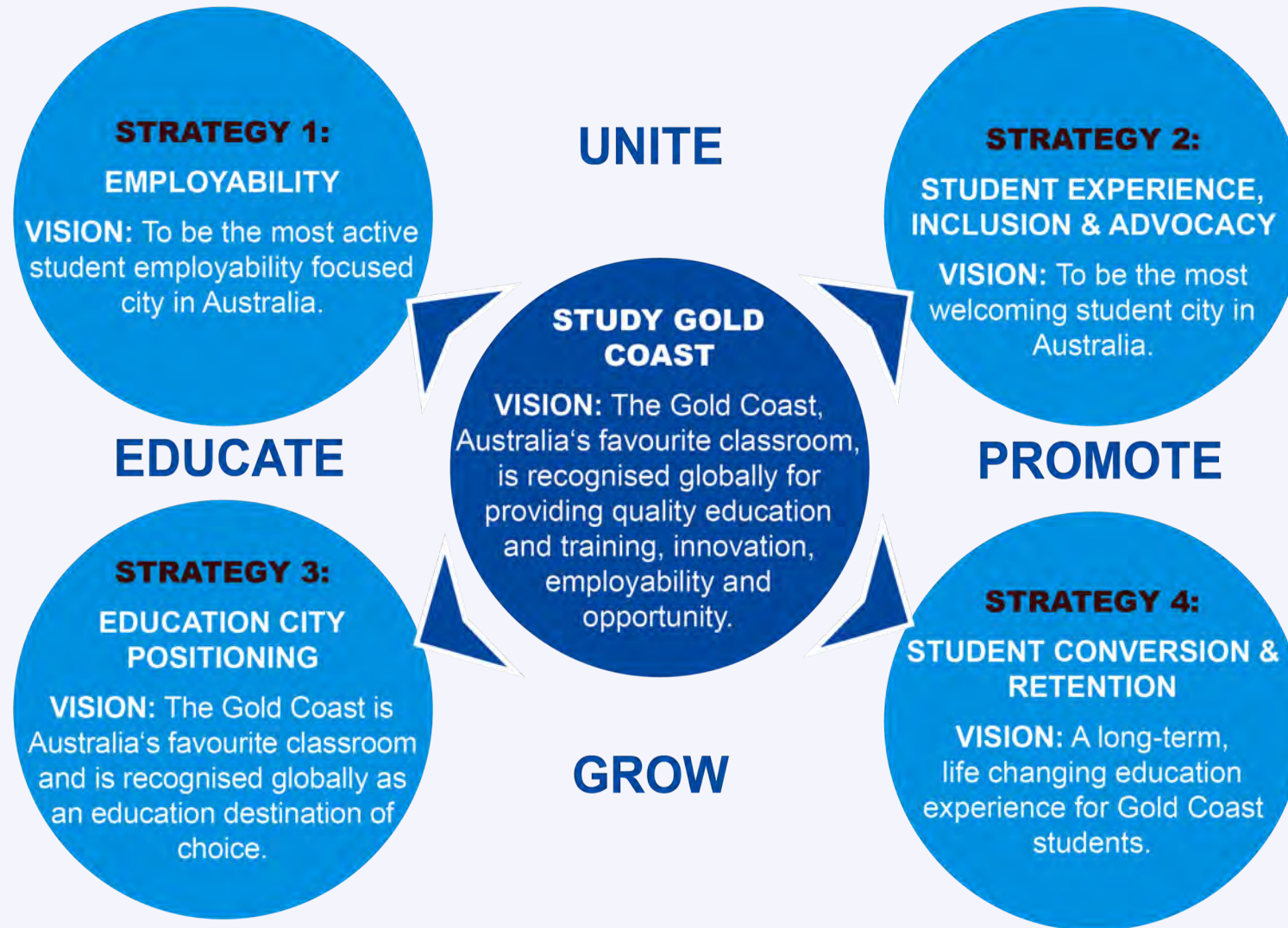
Communication



The rise of education focused DMOs



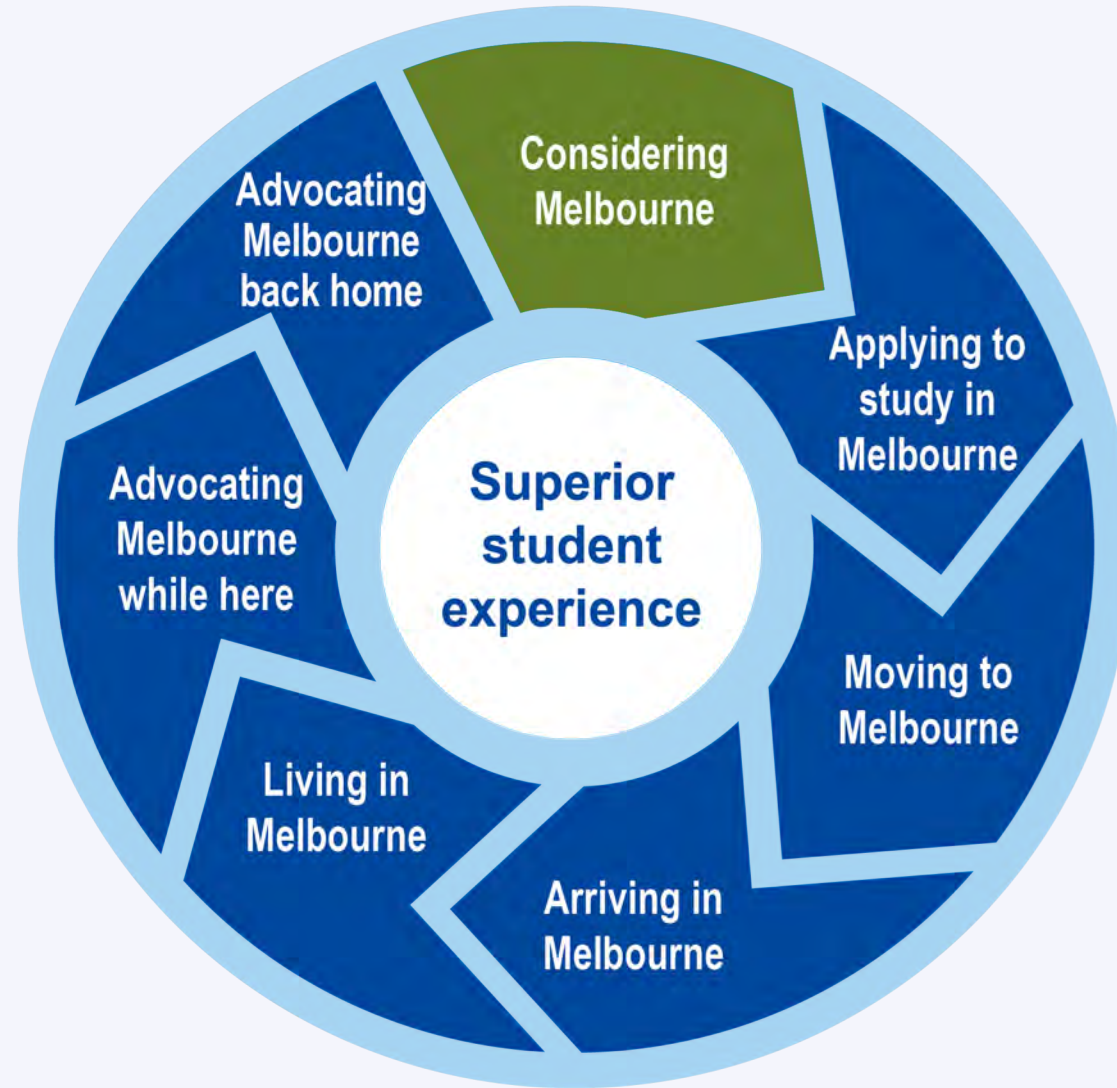
Study Gold Coast Strategy



Study Cairns VR Tour



StudyMelbourne approach



StudyMelbourne video



Education focused DMO's - Regions



Study Queensland



Summer Life Campaign



Education focussed DMO's - Countries



#FutureProofYourself – New Zealand



What could you learn?



In conclusion

