Industry Canada Industrie Canada

Research Report

February 2007

Providing a Planning and Development Roadmap for the Education Canada Brand

Canada

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Contents

1. Introduction

This report represents part of the first and second phases of a recommended brand planning process. Those phases entail understanding where the Education Canada Brand is currently positioned within the marketplace and why it is currently positioned that way. Subsequent phases in that process would assess where it can be positioned in the future and how to start to change target audiences' perceptions, to bring to life the desired Education Canada Brand.

The report provides context for the brand planning process by outlining the global international education market, including language training, in which Canada is an important player. It considers target audiences, competitor positioning and Canada's positioning within that marketplace; and summarize responses of key stakeholders to the brand planning initiative. It then presents implications from this research base; make recommendations regarding any supplementary research that is considered appropriate; and identify next steps in the process.

Objectives

The main objectives of this report are:

1. the identification of areas of opportunity for the positioning and communication of the Education Canada Brand;.

2. the provision of a thorough and proven planning and development roadmap for the further development of the Education Canada Brand.

Background

This report focuses on exploring where the Canadian education brand is today and why. And through an understanding of this, seeks to identify possible positioning opportunities for the Education Canada Brand while at the same time paving the way for future exploration, further definition and communication of the most relevant and compelling brand vision for Education Canada.

Approach

To identify initial positioning opportunities for the Education Canada Brand, the study, though secondary research and an online discussion among a limited number of key stakeholders, has undertaken data analyses in order to:

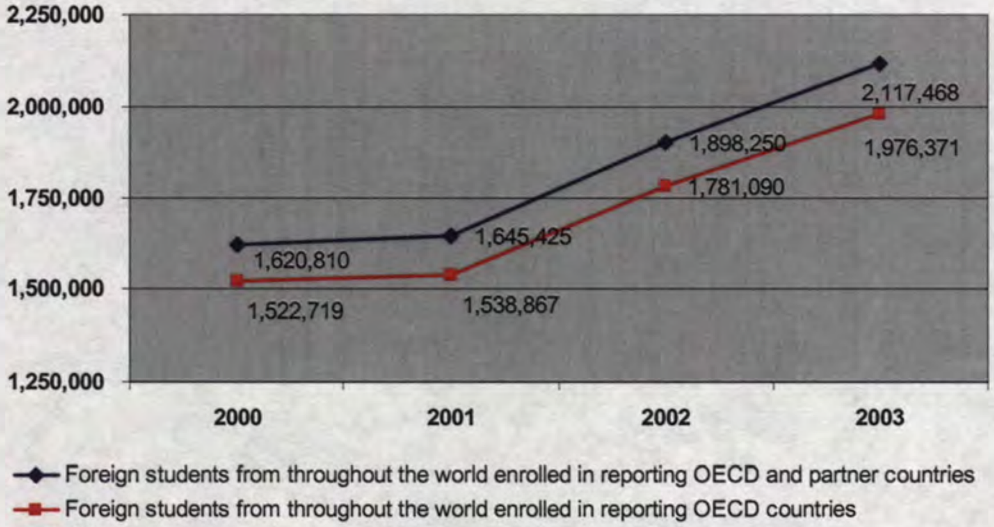
1. develop an overview of the global marketplace;
2. develop initial profiles of your target audiences;
3. identify and provide SWOT (Strengths, Weaknesses, Opportunities, Threats) analyses of competitor brands;
4. attempt to identify how the current Education Canada Brand is positioned within the marketplace; and
5. begin to solicit endorsement of the initiative among key stakeholders.

The outcomes of each of the pieces of work under the above headings are presented in the body of the Report as follows.

2. An Overview of the Global Marketplace

Estimated to be worth more than $US 35 billion a year in export income for the major English speaking destination countries, the international student market is now a significant global industry. In 2003 there were approximately 100 million students enrolled in higher education across the globe[1], and this is projected to increase to 263 million places by 2025.[2] In 2003 it was estimated that more than two million of the 100 million students enrolled in higher education were international students who were studying outside their home country (see chart below).

Table 1 The growth in total numbers of international students



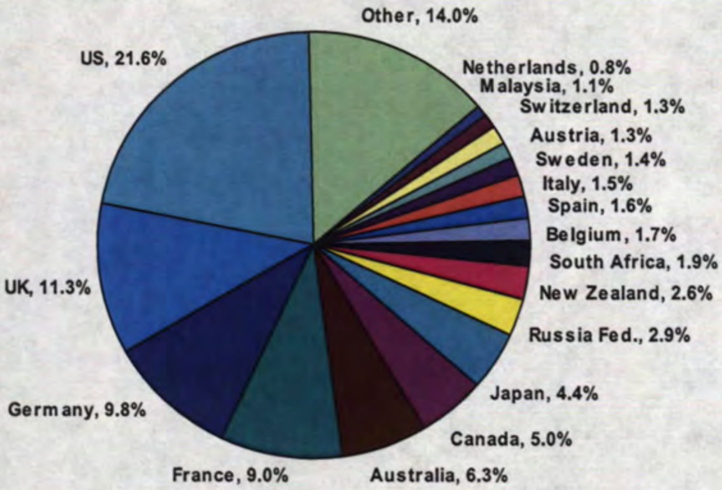
Source: OECD

According to the Organisation for Economic Co-operation and Development (OECD), the United States is the leading destination for international students, followed by the UK, Germany, France, and Australia (see pie on page 6). The Atlas of Student Mobility[3] also identifies these same five countries as the leading destinations for international education.

The recent growth in demand for international education is expected to continue. IDP's (IDP Education Australia Ltd) Global Student Mobility 2025 Study forecast that, global demand for international higher education is forecast to increase from about 2.1 million in 2003 to about 5.8 million by 2025[4], *"with demand for places in the five MESDCs (major English speaking destination countries) forecasted to increase from about 1 million places to about 2.6 million places"* over this time. Even if this forecast significantly overestimates the growth in demand, the data still points to an overall continued growth in the demand for international higher education.

[1] International Finance Corporation
[2] Global Student Mobility 2025: IDP 2002
[3] Davis, Todd M. "Atlas of Student Mobility". Institute of International Exchange (IIE) 2003
[4] Global Student Mobility 2025: IDP 2002

Table 2 Percentage of foreign tertiary students reported to the OECD who are enrolled in each country of destination (2004)



Source: OECD

It is more than evident that international education has become a valuable commodity representing a significant portion of Service Exports in Anglophone countries. In 2003, international education accounted for[5]:

- 13% of Australia's service exports
- 8% for New Zealand;
- 4.2% for the US; and
- 3.2% for the UK.

The following subsections will examine the global international education market in a sector-by-sector analysis including Higher Education; Vocational Education and English Language. This will include updates on the major Anglophone destinations', as well as France where data is available.

[5] Perkinson, R. "Trends in Global Higher Education . . . and the changing landscape across South East Asia." Presentation to APPLE Conference, Singapore, August 2005

2.1 HIGHER EDUCATION

Global Overview of Higher Education

This section presents a general overview of the international higher education (HE) market. Data will be presented for the Major English Speaking Destination countries (MESDCs) as well as France and Germany, which has shown strong growth in recent years and where many degree programs are taught partially or exclusively in English. As a result of varying methodologies of data collection and reporting, more emphasis should be placed on analyzing trends within a particular destination, than comparing data between the countries.

In 2004/05 (for those countries whose school year runs the length of a calendar year 2004/05 represents the 2005 school year) there were over 1.4 million international students undertaking higher education in either one of the five MESDCs, France or Germany. With the exception of the United States enrollments have increased consistently in each destination over the past seven years. International HE enrollments in Australia, New Zealand and Canada have more than doubled since 1998/99 while the UK, France and Germany have seen enrollments increase by about 75% since 1998/99. Although enrollments in the US have declined every year since peaking in 02/03, total US enrollments in 04/05 were up 15% from 98/99.

Table 3 Global trends in Higher Education – International student enrollments

	98/99	99/00	00/01	01/02	02/03	03/04	04/05	05/06	% Change	
									Since 98/99	Latest year
US	490,933	514,723	547,867	582,996	586,323	572,509	565,039	564,766	15.0%	0.0%
UK	110,685	115,410	123,740	137,645	167,515	191,055	196,345	na	72.6%	14.1%
Australia	60,914	72,717	86,271	116,232	135,676	151,285	163,911	na	169.1%	8.3%
New Zealand	4,932	6,867	9,819	14,960	20,155	22,980	22,404	na	365.9%	-2.5%
France	118,433	125,688	137,505	154,749	174,864	194,194	202,836	209,523	76.9%	3.4%
Germany	103,716	108,785	112,883	125,714	142,786	163,213	180,306	na	73.8%	10.5%
Canada	34,509	39,851	45,989	54,876	62,530	69,767	77,497	82,470	124.6%	11.1%

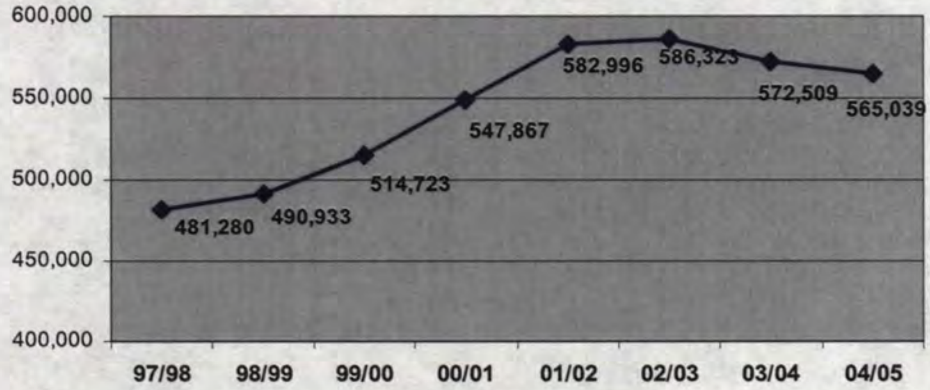
Sources:
US – *Opendoors*. The Institute of International Exchange (IIE)
UK – Higher Education Statistics Agency (HESA) (method of data collection was altered after 2001/02)
Australia – Department of Education Science and Training (DEST) (method of data collection was changed after 2000)
New Zealand – New Zealand Ministry of Education
France – Repères et références statistiques, édition 2006. Ministry of Education
Canada – Citizenship and Immigration Canada (CIC) (December 1 stock of foreign students)
Germany – DAAD (German Academic Exchange Service)

The sector has continued to perform well over the past couple years. The United States and New Zealand were the only MESDCs where enrollments did not peak in the latest year in which data was available for that country. The UK (14%), Canada (11%), Germany (11%), and Australia (8%) recorded the highest one-year growth (for the most recent period for which data was available).

Destination United States

The United States remains the leading destination for international HE students. As shown in Table 4, in 2004/05 there were 565,039 international students in the US. Enrollments have grown from 481,280 in 1997/98, however more recently enrollments have declined since peaking in 2002/03 at 586,323. *OpenDoors* reports a range of factors that has contributed to the recent decline: *"post-September 11 security-related changes in visa policy; increasing cost of higher education in the US; the growth of home countries' capacity to provide quality higher educational opportunities; and competition from other host countries."*

Table 4 Trends in International HE enrollments in the US 1997/98-2004/05



Source: The Institute of International Education (IIE)

As a result of recent changes to the visa regulations in the US combined with what is claimed to be a strategy designed to encourage international students to choose the US as a study destination, there is some thought, within the education sector, that enrollments will rebound as a result of these changes.

India and China are the leading sources of international HE students in the US. Together they accounted for a quarter of all international HE students in 2004/05, with enrollments of 80,466 and 62,523 respectively (see Table 5). There were also large numbers of students from Korea (53,358), Japan (42,215), Canada (28,140), and Taiwan (25,914) studying in the US in 2004/05.

As a whole, enrollments grew by 17% in the US between the years 1997/98 to 2003/04. The leading source countries that experienced the largest growth over this period included India (138%), Colombia (69%), Turkey (37%), Mexico (37%) and China (33%). However, student numbers did not increase amongst the leading source countries with enrollments of students from Thailand (-43%), Indonesia (-42%), Taiwan (-16%), Japan (-10%) and Germany (-7%) declining.

Table 5 International higher education enrollments in the US by leading source countries

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	04/05	% Change 97/98-04/05	% of Total 97/98	% of Total 04/05
India	33,818	37,482	42,337	54,664	66,836	74,603	79,736	80,466	137.9%	7.0%	14.2%
China	46,958	51,001	54,466	59,939	63,211	64,757	61,765	62,523	33.1%	9.8%	11.1%
South Korea	42,890	39,199	41,191	45,685	49,046	51,519	52,484	53,358	24.4%	8.9%	9.4%
Japan	47,073	46,406	46,872	46,497	46,810	45,960	40,835	42,215	-10.3%	9.8%	7.5%
Canada	22,051	22,746	23,544	25,279	26,514	26,513	27,017	28,140	27.6%	4.6%	5.0%
Taiwan	30,855	31,043	29,234	28,566	28,930	28,017	26,178	25,914	-16.0%	6.4%	4.6%
Mexico	9,559	9,641	10,607	10,670	12,518	12,801	13,329	13,063	36.7%	2.0%	2.3%
Turkey	9,081	9,377	10,100	10,983	12,091	11,601	11,398	12,474	37.4%	1.9%	2.2%
Germany	9,309	9,568	9,800	10,128	9,613	9,302	8,745	8,640	-7.2%	1.9%	1.5%
Thailand	15,090	12,489	10,983	11,187	11,606	9,982	8,937	8,637	-42.8%	3.1%	1.5%
United Kingdom	7,534	7,765	7,990	8,139	8,414	8,326	8,439	8,236	9.3%	1.6%	1.5%
Indonesia	13,282	12,142	11,300	11,625	11,614	10,432	8,880	7,760	-41.6%	2.8%	1.4%
Colombia	4,345	5,041	6,277	6,765	8,068	7,771	7,533	7,334	68.8%	0.9%	1.3%
Brazil	6,982	8,052	8,600	8,846	8,972	8,388	7,799	7,244	3.8%	1.5%	1.3%
World Total	**481,280**	**490,933**	**514,723**	**547,867**	**582,996**	**586,323**	**572,509**	**565,039**	**17.4%**		

Source: IIE

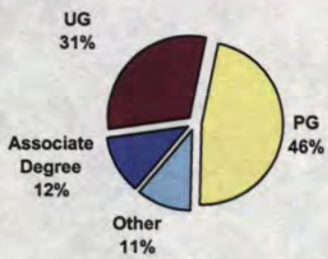
(It should be noted that international enrollments in the US include undergraduate, postgraduate and associate degree level courses. The latter refers to vocational education and these enrollments are not included in the HE data for other countries, including Australia and the UK).

Asia is by far the leading supplier of international HE students to the US with the top four source countries, and six of the top ten, being from this region. The leading non-Asian source countries include Canada, Mexico and Turkey.

In 2004/05, 46% of international HE students in the US were undertaking postgraduate study, 31% enrolled at the undergraduate level and 12% pursuing an Associate Degree (see Table 6).

Table 6 International HE students in the US by level of study – 2004/05

	03/04	04/05	% Change
Associate Degree	69,541	65,667	-5.6%
Undergraduate	178,659	173,545	-2.9%
Postgraduate	274,310	264,410	-3.6%
Other	49,999	61,417	22.8%
Total	572,509	565,039	-1.3%



Source: IIE

Similar to the Australian market, Business/Management is the most popular area of study for international students studying in the US, with 17.7% of international students undertaking Business related courses in 2004/05 (see Table 7). However, a significant percentage of students were also undertaking Engineering (17%) and Architecture/Building (11%) courses. There were 25% fewer international students undertaking Math/Computer Science, which was the third most popular field of study in 03/04, in the US in 04/05.

Table 7 International HE students in the US by field of study – 2004/05

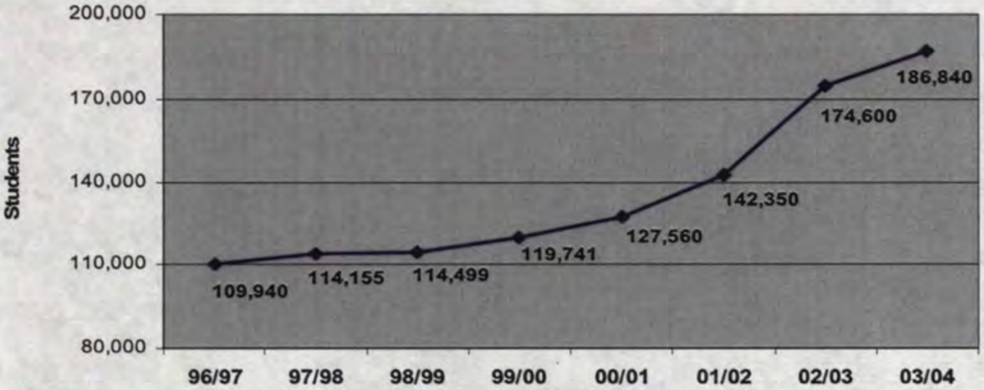
	03/04	04/05	% Growth	Market Share 04/05
Business/Management	108,788	100,079	-8.0%	17.7%
Engineering	95,220	92,952	-2.4%	16.5%
Architecture and Building	60,273	59,700	-1.0%	10.6%
Maths/Computer Science	67,693	50,747	-25.0%	9.0%
Physical/Life Sciences	44,607	49,499	11.0%	8.8%
Social Sciences	54,153	46,055	-15.0%	8.2%
Fine and Applied Arts	31,882	28,063	-12.0%	5.0%
Health Professions	25,749	26,301	2.1%	4.7%
Humanitites	16,622	15,850	-4.6%	2.8%
Education	15,909	15,697	-1.3%	2.8%
Agriculture	7,292	7,519	3.1%	1.3%
Other	60,273	59,700	-1.0%	10.6%
Total	572,509	565,039	-1.3%	100.0%

Source: IIE

Destination UK

The UK continues to be the second most popular destination for higher education amongst international students behind the US. As seen in Table 8, the number of international students from non-EU countries (international students from EU countries are not included as they are not full-fee paying international students) studying higher education in the UK increased every school year from 96/97 (109,940) to 03/04 (186,840). Growth has been very strong since 99/00 with enrollments increasing by 72.3% in the following four-year span (source: Higher Education Statistics Agency).

Table 8 Growth in UK international higher education (non-EU countries) 1996/97-2003/04



Source: HESA

It should be noted that the method of data collection altered in 2002/03 and the best way to compare trend data is by the December population marker. However, these figures are known to be conservative and actual enrollments are higher than that reported in Table 7. For instance the December population marker reports non-EU international enrollments of 186,840 in 2003/04, however HESA estimates that total enrollments of international students from non-EU countries reached 210,510 in 2003/04 and 218,395 in 2004/05.

The growth in the UK market appears to be the product of a number of factors; most importantly the impact of the Prime Minister's Initiative (PMI) – initially launched in 1999 and designed to build a brand for British Education. The second phase of this initiative was launched earlier this year (2006). This initiative has seen increased marketing activity globally by the British Council and the development and promotion of a strong brand for Britain. This has particularly been evident in key source markets for the UK.

China is, by far, the leading source of international HE students in the UK. In 03/04 Chinese students accounted for nearly a quarter (23%) of all non-EU international students in the UK (see Table 9). Chinese enrollments have been especially strong in recent years, growing by more than 37% in 03/04.

Other leading sources of international students for the UK include the US, India, Hong Kong and Malaysia. In 03/04 the UK attracted at least 10,000 HE students from each of these countries. Similar to that witnessed in other leading destinations China and India are not only amongst the leading sources of students but also represent high growth markets. Malaysia and Singapore are the only source countries where enrollments decreased from 96/97 to 03/04.

Table 9 Leading sources of international HE students in the UK (non-EU) 1996/97-2003/04

	96/97	97/98	98/99	99/00	00/01	01/02	02/03	03/04	% Change 96/97 - 03/04
China	2,660	2,860	3,850	6,095	10,390	17,785	31,930	43,815	1547.2%
United States	9,450	9,700	10,490	11,140	11,770	12,560	14,365	15,260	61.5%
India	2,300	2,935	3,315	3,630	4,300	5,980	10,900	13,210	474.3%
Hong Kong	7,765	7,210	7,510	8,140	8,315	8,640	9,735	10,175	31.0%
Malaysia	18,015	16,790	12,030	10,280	9,195	9,355	10,205	10,025	-44.4%
Japan	4,665	5,325	5,560	6,085	6,205	6,085	6,165	6,340	35.9%
Nigeria	1,835	1,900	2,020	2,130	2,380	2,935	4,135	5,270	187.2%
Taiwan	2,905	3,150	3,480	3,640	4,055	4,305	4,920	5,160	77.6%
Canada	2,760	2,885	2,975	3,115	3,045	3,310	3,685	4,010	45.3%
Singapore	5,645	5,970	5,615	5,270	4,630	3,995	4,160	3,820	-32.3%
Pakistan	1,790	1,910	1,905	2,055	1,965	2,285	2,805	3,790	111.7%
South Korea	1,870	2,280	2,070	2,140	2,325	2,570	2,900	3,335	78.3%
Thailand	2,085	2,645	2,365	2,525	2,720	2,750	2,975	3,330	59.7%
Kenya	1,960	2,100	2,225	2,265	2,450	2,560	2,820	2,870	46.4%
Zimbabwe	810	945	1,285	1,795	2,315	2,605	2,920	2,715	235.2%
Ghana	770	875	910	1,010	1,070	1,315	1,840	2,450	218.2%
Sri Lanka	940	945	1,035	1,110	1,345	1,550	1,875	2,100	123.4%
Non-EU Total	**109,940**	**114,155**	**114,499**	**119,741**	**127,560**	**142,350**	**174,600**	**186,840**	**69.9%**

Source: HESA

Similar to the US, but not Australia, the majority of international students in the UK are undertaking postgraduate qualifications. In 2003/04, 55% of international students in the UK were postgraduates and 45% were undergraduates (as illustrated in Table 10).

Table 10 Level of study for international HE students in the UK (non-EU) 2003/04

Source: HESA

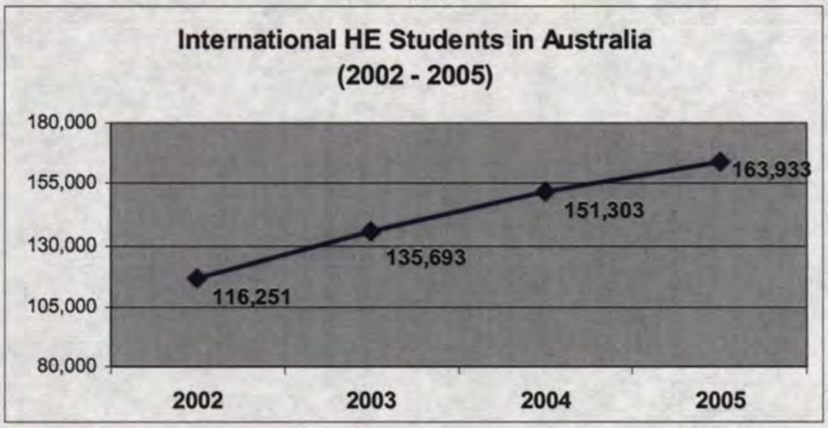
Destination Australia

Australia has become one of the leading suppliers of international education across all education sectors including Higher Education. It is estimated that the total value of Australia's education exports reached $AUD 7.28 billion for the 2005 calendar year. The popularity of Australia as a study destination appears to be the result of many factors some of which are:

- its proximity to key Asian source countries
- increased marketing activity both at the institutional and country level
- the relative lower cost of undertaking study in Australia compared to leading competitors such as the US and the UK.

According to data published by Australian Education International (AEI) over the four year period 2002 to 2005 the number of international HE students in Australia grew by over 40% , increasing from 116,251 in 2002 to 163,933 in 2005 (see Table 11). Enrollments increased by over 8% between 2004 and 2005. Preliminary data reported for 2006 shows a 5% increase in year-to-date HE enrollments from August 2005 to August 2006.

Table 11 Total number of international students undertaking Higher Education in Australia (2002-2005)



Source: AEI

The vast majority of international HE students who study in Australia are Asian with each of the top eleven source countries in 2005 from this region (see Table 12). In 2005 more than 40,000 Chinese students undertook HE in Australia (accounting for 24% of all international students in Australia in 2005). India has been the second largest source of international students since 2004.

China and India not only represent the largest source countries but they are also the markets showing the strongest growth. Chinese enrollments grew by 146% between 2002 and 2005, while Indian enrollments increased by 151% during this time.

Behind China and India are some of Australia's more traditional suppliers of international students – Malaysia, Hong Kong, Indonesia and Singapore. In 2005, more than 8,000 international students were from each of these countries. However, Australia received fewer students from each of these four countries in 2005 than in 2004. Indonesian and Singaporean enrollments were each down by 10% while Malaysian enrollments were down 3% and Hong Kong enrollments decreased by 2%.

Indonesian and Malaysian enrollments appear to be the most worrying as they were down 17% and 20%, respectively, from 2002 to 2005. None of the other leading eleven source countries had declining enrollments over this period.

Table 12 Overseas students in HE in Australia by leading source countries

	2002	2003	2004	2005	% Growth	
					02-05	04-05
China	16,270	22,551	30,203	40,055	146.2%	32.6%
India	8,867	12,291	17,850	22,263	151.1%	24.7%
Malaysia	13,575	15,436	15,894	15,374	13.3%	-3.3%
Hong Kong	8,374	10,164	10,971	10,709	27.9%	-2.4%
Indonesia	11,437	11,379	10,541	9,540	-16.6%	-9.5%
Singapore	10,430	10,182	9,229	8,348	-20.0%	-9.5%
South Korea	3,674	4,480	4,977	5,375	46.3%	8.0%
Thailand	4,959	5,670	5,720	5,251	5.9%	-8.2%
Taiwan	3,881	4,104	4,166	3,967	2.2%	-4.8%
Bangladesh	2,043	2,769	3,371	3,655	78.9%	8.4%
Japan	2,645	2,947	3,270	3,473	31.3%	6.2%
Total Australia	***116,251***	***135,693***	***151,303***	***163,933***	***41.0%***	8.3%

Source: AEI

The leading areas of study for international HE students in Australia are presented in Table 13. Business Administration/Management is by far the leading field of study amongst international students. In 2005 more than 66,000 international students were undertaking a Business related course in Australia (or 40% of all international students). The next most popular course was Computer Science/Information Systems (which accounted for 14% of international students in 2005) followed by Engineering/Surveying (9%) and Arts/Humanities and Social Sciences (8%). At least 5,000 international students were enrolled in courses in each of these fields in 2005.

Table 13 International HE students in Australia by field of study (2002-2005)

	2002	2003	2004	2005	% Growth 02-05	04-05
Business Administration, Management	43,139	51,122	58,269	66,327	53.8%	13.8%
Computer Science, Information Systems	22,729	23,960	24,761	23,631	4.0%	-4.6%
Engineering, Surveying	9,971	12,068	13,675	14,085	41.3%	3.0%
Arts, Humanities and Social Sciences	10,371	11,755	12,341	12,533	20.8%	1.6%
Economics	4,151	5,697	6,440	7,075	70.4%	9.9%
Science	3,798	4,649	5,006	5,360	41.1%	7.1%
Visual and Performing Arts	2,997	3,558	3,964	4,112	37.2%	3.7%
Education	2,072	2,710	3,273	3,818	84.3%	16.7%
Medical Science, Medicine	2,075	2,693	3,217	3,651	76.0%	13.5%
Services, Hospitality, Transport	1,902	2,421	3,016	3,608	89.7%	19.6%
Architecture, Building	2,678	2,981	3,163	3,311	23.6%	4.7%
Nursing	1,222	1,510	2,080	2,886	136.2%	38.8%
Health, Community Services	1,449	1,692	2,049	2,536	75.0%	23.8%
Physical Sciences	2,093	2,291	2,347	2,362	12.9%	0.6%
Law, Legal Studies	1,607	1,896	1,983	2,080	29.4%	4.9%
Multi-Field Education	705	851	1,067	1,310	85.8%	22.8%
Life Sciences	986	943	1,131	1,234	25.2%	9.1%
Language Studies	504	724	966	1,132	124.6%	17.2%
Pharmacy	487	639	786	907	86.2%	15.4%
Land and Marine Resources, Animal Hus	514	600	740	812	58.0%	9.7%
Veterinary Science	302	376	421	518	71.5%	23.0%
Mathematics	302	301	317	325	7.6%	2.5%
Dental Services	197	256	291	320	62.4%	10.0%
Total	116,251	135,693	151,303	163,933	41.0%	8.3%

Source: AEI

Amongst the leading fields of study Business/Management, Economics, Education, Medicine, Services/Hospitality/Transport and Nursing are experiencing the most growth while Computer Science/Information Systems, Arts/Humanities and Social Sciences, Architecture/Building and Physical Sciences have experienced the most limited growth in student numbers.

Unlike the US and the UK, the majority of international HE students in Australia are undertaking an undergraduate degree. However, undergraduate student numbers are increasing at a slower rate than postgraduates. Therefore, the percentage, overall, of international students in Australia who are studying at the undergraduate level is decreasing – 63% of international students in Australia were undergraduates in 2002 compared to 59% in 2005. This percent has decreased every year since 2002 (see Table 14).

Table 14 International HE students in Australia by level of study (2002-2005)

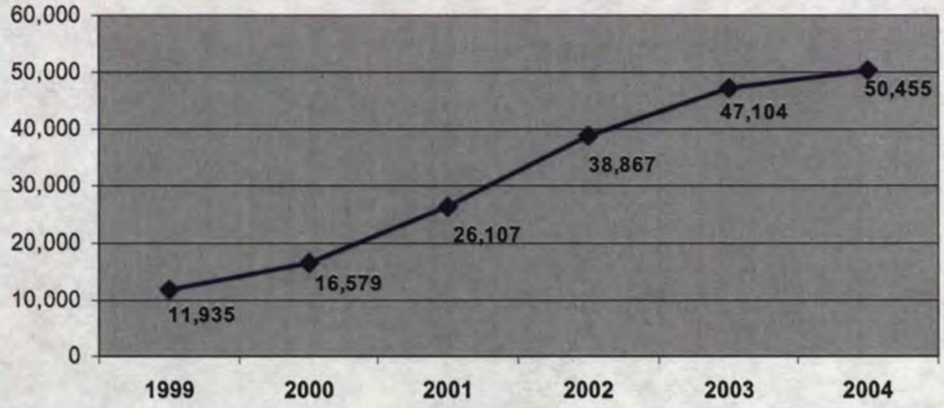
	2002	2003	2004	2005	% Growth 02-05	04-05
Undergraduate	73,085	83,789	91,112	95,885	31.2%	5.2%
Postgraduate	43,149	51,889	60,167	68,019	57.6%	13.1%
Other	17	15	24	29	70.6%	20.8%
Total	116,251	135,693	151,303	163,933	41.0%	8.3%
% UG	62.9%	61.7%	60.2%	58.5%		

Source: AEI

Destination New Zealand

The New Zealand market for international tertiary students has more than quadrupled from 1999 to 2004. Over this time student numbers increased every year from 11,935 in 1999 to 50,455 in 2004 (see Table 15). Factors that would appear to contribute to this growth are the increased activity in the generic promotion of New Zealand as a destination, opportunities for permanent residency and a weak NZ dollar during much of this time which has made it a relatively inexpensive study destination compared to other leading destinations.

Table 15 Trends in International tertiary enrollments in New Zealand 1999-2004



Source: New Zealand Ministry of Education

New Zealand has achieved especially high growth in recent years. In the last two years alone international enrollments have increased by 30%. The vast majority of international tertiary students undertaking study in New Zealand are from Asia with five of the top six sources of students in 2004 comprising of Asian nations.

As shown in Table 16, New Zealand is heavily reliant on Chinese enrollments with as many as 60% of 2004 enrollments coming from China. China has been the leading provider of students to New Zealand since 2000. Other leading sources include the United States, Japan, South Korea, India and Malaysia. More than 1,000 students from each of these countries studied in New Zealand in 2004. Its worth noting that Indian and American enrollments have increased significantly in recent years.

Table 16 International tertiary enrollments in New Zealand by leading source countries 1999-2004

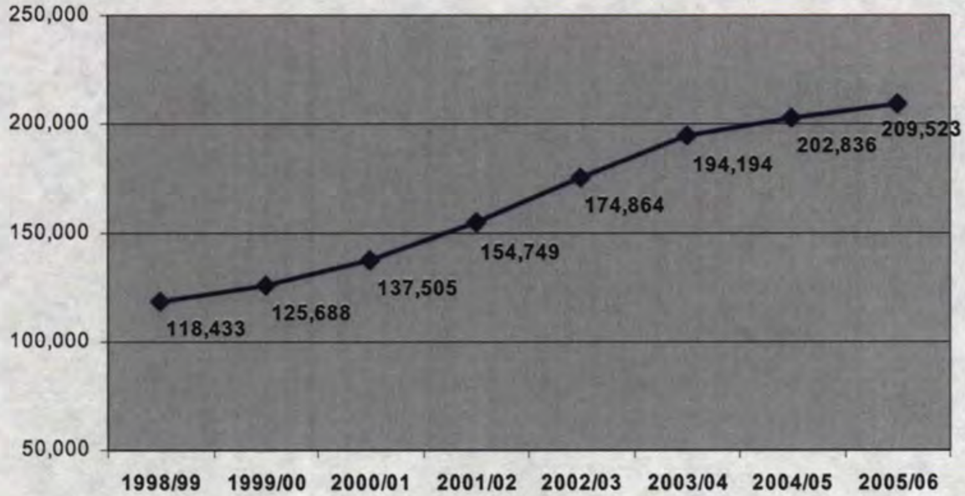
	1999	2000	2001	2002	2003	2004	% Change 99 - 04	% Change 03 - 04
China	892	3,807	9,507	19,134	27,215	29,898	3251.8%	9.9%
USA	595	778	1,016	1,355	1,800	2,300	286.6%	27.8%
Japan	1,551	1,863	2,386	2,613	2,141	2,105	35.7%	-1.7%
South Korea	773	1,265	1,953	2,494	2,168	2,032	162.9%	-6.3%
India	120	332	823	1,614	2,038	1,936	1513.3%	-5.0%
Malaysia	1,939	1,655	1,504	1,216	1,130	1,258	-35.1%	11.3%
Germany	245	322	507	702	835	938	282.9%	12.3%
Great Britain	211	254	330	451	532	709	236.0%	33.3%
Fiji	458	495	649	796	695	692	51.1%	-0.4%
Thailand	606	683	789	868	749	685	13.0%	-8.5%
Vietnam	114	148	285	399	546	584	412.3%	7.0%
Taiwan	586	753	830	829	602	564	-3.8%	-6.3%
Total	*11,935*	*16,579*	*26,107*	*38,867*	*47,104*	*50,455*	*322.7%*	*7.1%*

Source: New Zealand Ministry of Education

Destination France

Since 1998/99 there have been an increasing number of foreign students undertaking study at French universities – from 118,433 in 1998/99 to 209,523 in 2005/06. The number of foreign university students increased by 77% over the seven-year period 1998/99 to 2005/06.

Table 17 Foreign students at French universities 1998/99-2005/06



Source: Repères et références statistiques, édition 2006. Ministry of Education

Half of the international students, more than 100,000, attending university in France in 2005/06 were from Africa (see Table 18). In this respect, France is quite unique to the MESDCs where the majority of the international students undertaking higher education are from Asia.

Table 18 Foreign students at French universities by leading source regions 2005/06

	2005/06	Market Share
Africa	104,787	50.0%
Europe	48,692	23.2%
European Union	*32,603*	*15.6%*
Asia	41,668	19.9%
Americas	13,926	6.6%
World Total	209,523	100.0%

Source: Repères et références statistiques, édition 2006. Ministry of Education

Four of the top five sources of international students in France are African nations – Morocco (25,782), Algeria (21,552), Tunisia (9,593) and Senegal (9,019). China was the third leading source country (15,963) accounting for 7.6% of all foreign students in French universities in 2005/06.

The leading EU sources of students – Europe was the second leading source region of international HE students in France in 2005/06 – were Germany, Italy, Spain and Poland.

Table 19 Foreign students at French universities by leading source countries 2005/06

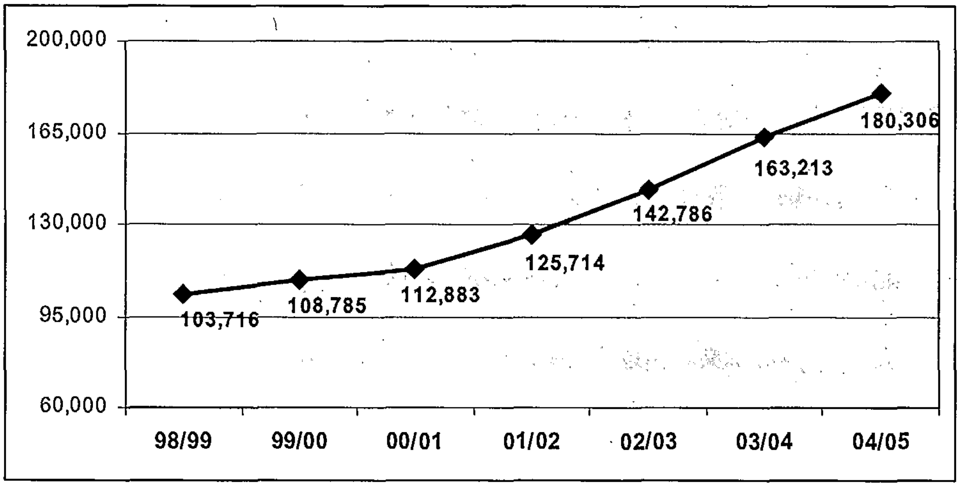
	2005/06	Market Share
Leading Non EU Countries		
Morocco	25,782	12.3%
Algeria	21,552	10.3%
China	15,963	7.6%
Tunisia	9,593	4.6%
Senegal	9,019	4.3%
Cameroon	4,958	2.4%
Lebanon	4,529	2.2%
Romania	4,442	2.1%
Vietnam	4,331	2.1%
Ivory Coast	3,589	1.7%
Madagascar	3,469	1.7%
Gabon	3,004	1.4%
Leading EU Countries		
Germany	6,422	3.1%
Italy	4,163	2.0%
Spain	3,447	1.6%
Polond	3,268	1.6%
Total All Countries	209,523	

Source: Repères et références statistiques, édition 2006. Ministry of Education

Destination Germany

International HE enrollments in Germany increased every year from 1998/99 (103,716) to 2004/05 (180,306) – see Figure 18. Overall, enrollments grew by 74% over this time and growth was especially strong from 2000/01 to 2004/05.

Figure 18 Trends in International HE enrollments in Germany 1997/98-2004/05

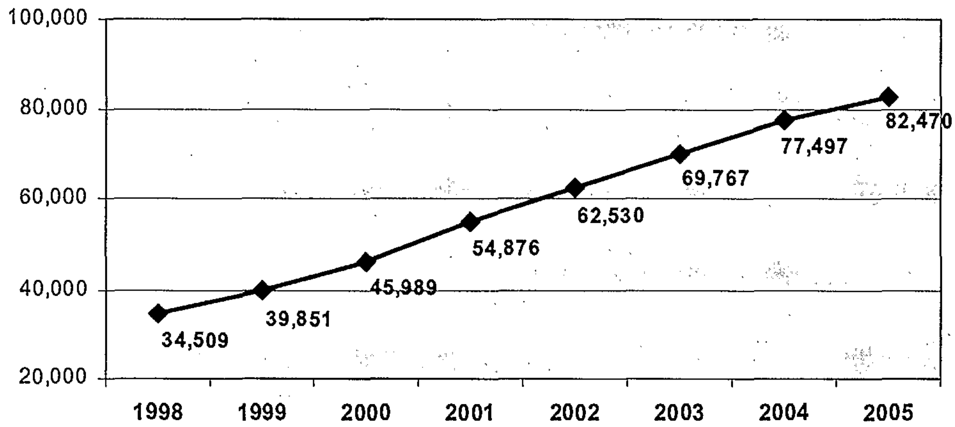


Source: DAAD

Destination Canada

International HE enrollments in Canada have grown considerably since 1998 - increasing from 34,509 in 1998 to 82,470 in 2005 (139% growth over this time). In 2005, foreign enrollments in higher education increased by 6% on the previous year (see Table 20).

Table 20 December 1 stock of foreign students at Canadian universities 1998-2005



Source: CIC

Citizenship and Immigration Canada (CIC) does not report the number of foreign HE students by source country, however source country statistics are available for foreign students across all education levels. Although this data does not speak directly to higher education it does provide a good insight into the key markets of overseas students.

In 2005, the leading sources of international students in Canada were China, South Korea, the US, Japan and France. China and South Korea accounted for 40% of international enrollments in 2005 and have consisted of the top 2 source countries every year since 2001.

Other leading sources of international students include India, Hong Kong, Taiwan, Mexico, Germany and the UK.

Table 20b December 1 stock of foreign students in Canada by leading source countries 1998-2005 (all sectors of education)

	1998	1999	2000	2001	2002	2003	2004	2005	% Change	
									98 - 05	04 - 05
China	3,020	5,363	8,991	16,776	24,974	31,344	34,369	36,137	1096.6%	5.1%
South Korea	8,313	10,026	14,284	18,933	21,976	23,451	24,629	25,461	206.3%	3.4%
US	8,999	9,837	10,885	11,705	11,501	11,191	11,418	11,734	30.4%	2.8%
Japan	9,568	9,445	9,430	10,118	9,298	8,649	8,524	8,713	-8.9%	2.2%
France	4,254	5,090	5,569	6,047	5,549	5,722	5,874	6,230	46.5%	6.1%
India	861	1,127	1,437	1,894	2,807	3,866	4,110	5,033	484.6%	22.5%
Hong Kong	6,270	5,914	5,820	5,788	5,778	5,435	5,214	4,875	-22.2%	-6.5%
Taiwan	5,372	5,331	5,666	5,494	5,509	5,025	4,999	4,785	-10.9%	-4.3%
Mexico	2,407	2,818	3,636	4,296	3,360	2,910	3,074	3,387	40.7%	10.2%
Germany	1,683	1,818	2,072	2,184	2,127	2,050	2,170	2,367	40.6%	9.1%
UK	1,894	2,133	2,158	2,443	2,221	1,971	2,121	2,244	18.5%	5.8%
Malaysia	1,183	1,071	946	877	778	83	812	864	-27.0%	6.4%
Top 10 Source Countries	51,780	57,775	68,511	83,784	92,973	99,643	104,381	108,722	110.0%	4.2%
Other	25,078	28,764	32,428	36,827	37,868	39,509	41,980	45,274	80.5%	7.8%
Total	***76,858***	***86,539***	***100,939***	***120,611***	***130,841***	***139,152***	***146,361***	***153,996***	***100.4%***	***5.2%***

Source: CIC

2.2 VOCATIONAL EDUCATION

2.2.1 Global Overview of Vocational Education

The international vocational education market appears to be in a somewhat healthy state with all the Major English Speaking Destination Countries (MESDCs), with the exception of the US, mostly experiencing continual growth since 1999/2000 (see Table 21). International student enrollments in vocational education have grown considerably in destinations such as the UK (especially amongst non-EU students), Australia, New Zealand and Canada.

However, there is some concern with most of the MESDCs experiencing a slower rate of growth (or a reduction in students – US, New Zealand and Canada) for the most recent year in which data is available for that country. Australia was the exception where enrollments increased by 14% from 2003/04 to 2004/05, which was higher than the 7% average annual growth recorded from 2001/02 to 2004/05 (it should be noted that the method of data collection and reporting in Australia was altered after 2000/01).

If comparing data between countries, it would appear that the UK, the US and Australia are the most popular English speaking destinations for vocational education for international students. However, as a result of varying methodologies of data collection and reporting, more emphasis should be placed on analyzing trends within a particular destination, than comparing data between the countries.

Data regarding the state of the international vocational education market in French speaking destinations, specifically Canada and France, was not readily available for this research study.

Table 21 Global trends in international vocational education

	99/00	00/01	01/02	02/03	03/04	04/05	% Change	
							Since 99/00	Latest year
UK								
Total	65,715	69,235	71,780	70,260	73,610	na	12.0%	4.8%
non-EU	38,785	46,675	47,995	49,135	50,390	na	29.9%	2.6%
US	59,830	67,493	67,667	72,494	69,541	65,667	9.8%	-5.6%
Australia	30,759	39,843	53,930	56,489	57,989	66,016	114.6%	13.8%
New Zealand	8,651	15,308	23,092	25,069	22,365	na	158.5%	-10.8%
Canada	14,241	17,162	18,841	20,229	20,316	19,220	35.0%	-5.4%

Sources:

UK – Higher Education Statistics Agency (HESA)

Australia – Department of Education Science and Training (DEST) * Method of data collection was altered after 00/01

US – *OpenDoors*. The Institute of International Exchange (IIE)

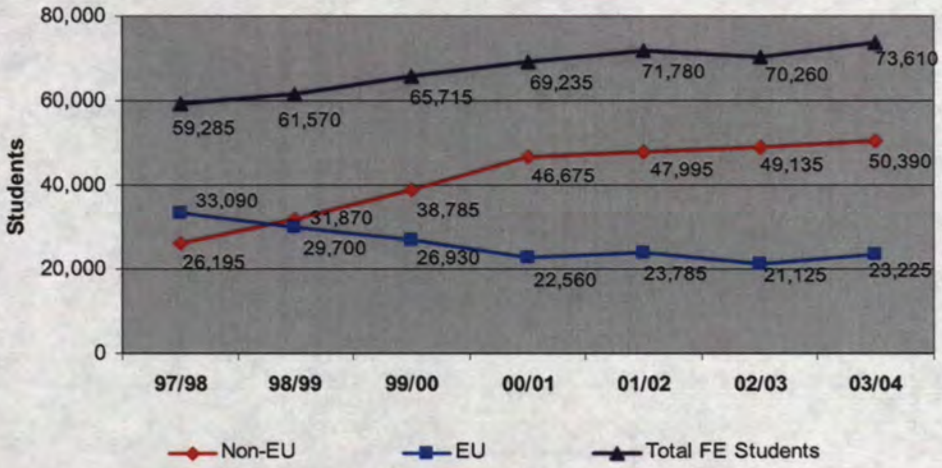
New Zealand –New Zealand Ministry of Education

Canada – Citizenship and Immigration Canada (CIC)

Destination UK

The UK is now the largest market for vocational education, or as defined in the UK *Further Education* (FE). In 03/04 there were 73,610 international students studying further education in the UK (see Table 22). Enrollments increased every year from 97/98 with total growth of 24%.

Table 22 International enrollments in UK Further Education – by EU and non-EU countries



Source: – Higher Education Statistics Agency (HESA)

In recent years the growth in international students has been fuelled by non-EU students with enrollments increasing from 26,195 in 97/98 to 50,390 in 03/04.

From 1997/98 to 2003/04 the number of international students from outside the EU undertaking further education in the UK nearly doubled. Contrastingly, international enrollments from within the EU have declined by 30% from 97/98 to 03/04.

Most of the leading non-EU source countries were from Asia, the Middle East and Europe. Similar to that which is prevalent in the broader international education industry, China and India were the major leading sources of FE students in the UK during the 03/04 school-year (see Table 23). With the exception of Japan and South Korea, all of the leading source countries experienced growth from 1997/98 to 03/04, with enrollments from most countries more than doubling during this period.

Conversely, EU enrollments in UK FE programs have decreased since 1997/98. Although enrollments increased in the latest year, EU enrollments declined by nearly a third (30%) over the six-year period 1997/98 to 2003/04 (see Table 24).

Table 23 International enrollments in UK Further Education – leading source countries (non-EU countries)

	97/98	98/99	99/00	00/01	01/02	02/03	03/04	% Change
China	580	1,345	2,840	4,660	6,455	7,440	6,875	1085.3%
India	1,120	1,755	2,185	2,425	2,795	2,295	2,940	162.5%
Poland	495	575	680	905	895	1,140	2,400	384.8%
Czech Republic	1,705	1,890	2,160	2,470	2,400	2,435	2,155	26.4%
Japan	2,785	2,995	3,075	2,940	2,170	2,410	2,035	-26.9%
Iran	420	375	595	1,190	1,105	1,405	1,525	263.1%
Turkey	1,170	1,255	1,495	1,700	1,690	1,480	1,500	28.2%
Pakistan	565	1,605	1,170	1,570	1,815	1,425	1,480	161.9%
Slovakia	1,170	1,250	1,205	1,485	1,535	1,475	1,450	23.9%
Iraq	160	260	475	980	895	1,340	1,080	575.0%
United Arab Emirates	500	625	825	955	1,020	940	955	91.0%
Hungary	695	720	910	1,140	1,275	1,045	885	27.3%
Afghanistan	170	295	510	965	1,120	980	880	417.6%
Zimbabwe	175	230	400	590	800	940	875	400.0%
Hong Kong	935	1,005	1,035	1,120	1,085	925	845	-9.6%
South Korea	940	540	660	750	840	820	845	-10.1%
Jamaica	270	405	750	990	1,330	1,330	820	203.7%
Non-EU Total	**26,195**	**31,870**	**38,785**	**46,675**	**47,995**	**49,135**	**50,390**	**92.4%**

Source: HESA

Spain, Ireland, Italy, France and Germany are the leading sources of international FE students from the EU. Only two of the top 15 EU source markets experienced growth from 1997/98 to 2003/04 – Portugal and the Netherlands.

Table 24 International enrollments in UK Further Education – leading source countries (EU countries)

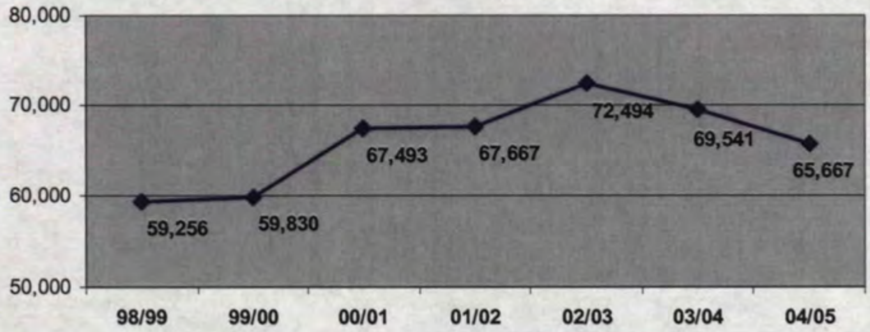
	97/98	98/99	99/00	00/01	01/02	02/03	03/04	% Change
Spain	7,187	6,724	6,108	5,361	5,645	5,185	5,580	-22.4%
Ireland	3,620	3,130	3,306	3,430	3,325	2,665	3,580	-1.1%
Italy	6,253	5,058	4,146	3,605	3,690	3,000	3,260	-47.9%
France	5,218	4,877	4,561	3,601	3,940	3,200	3,240	-37.9%
Germany	4,379	3,793	3,577	2,772	2,685	2,810	2,915	-33.4%
Portugal	910	800	670	650	840	1,000	1,505	65.4%
Netherlands	651	640	580	665	725	720	825	26.7%
Denmark	895	710	640	740	630	680	570	-36.3%
Sweden	1,325	1,095	875	605	610	535	440	-66.8%
Greece	985	1,244	1,015	710	610	455	400	-59.4%
Belgium	535	515	520	455	400	310	335	-37.4%
Austria	575	530	455	390	310	290	280	-51.3%
Finland	550	520	420	360	320	235	255	-53.6%
Gibraltar	25	25	20	20	40	20	25	0.0%
Luxembourg	20	25	25	45	15	15	20	0.0%
EU Total	**33,090**	**29,700**	**26,930**	**22,560**	**23,785**	**21,125**	**23,225**	**-29.8%**

Source: HESA

Destination US

The international vocational education (Associate Degrees) market in the US increased by 11% from 1998/99 to 2004/05, but receded by 9% since 2002/03. In 2004/05 there were approximately two thousand fewer international vocational education students in the US as there were in 2000/01 and 2001/02. This is illustrated in Table 25.

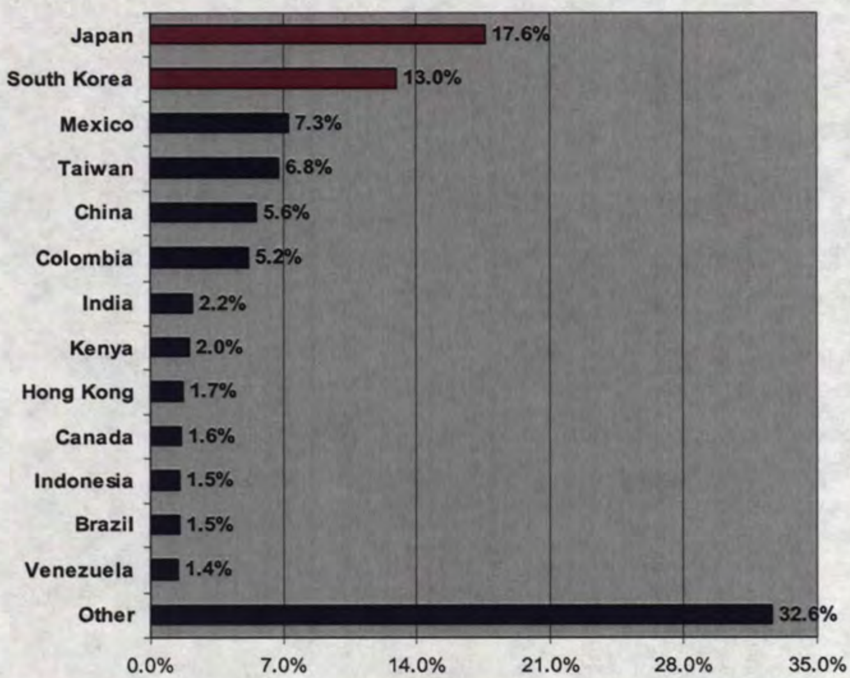
Table 25 Trends in the number of international students in the US undertaking an Associate's Degree



Source: The Institute of International Education (IIE)

Table 26 lists the leading source countries by percentage of all international vocational education students in the US in 2003/04. Japan (18%) and South Korea (13%) were the leading source countries; together they accounted for nearly a third (31%) of all US international vocational education enrollments.

Table 26 Sources of international students in the US undertaking an Associate's Degree 2003/04



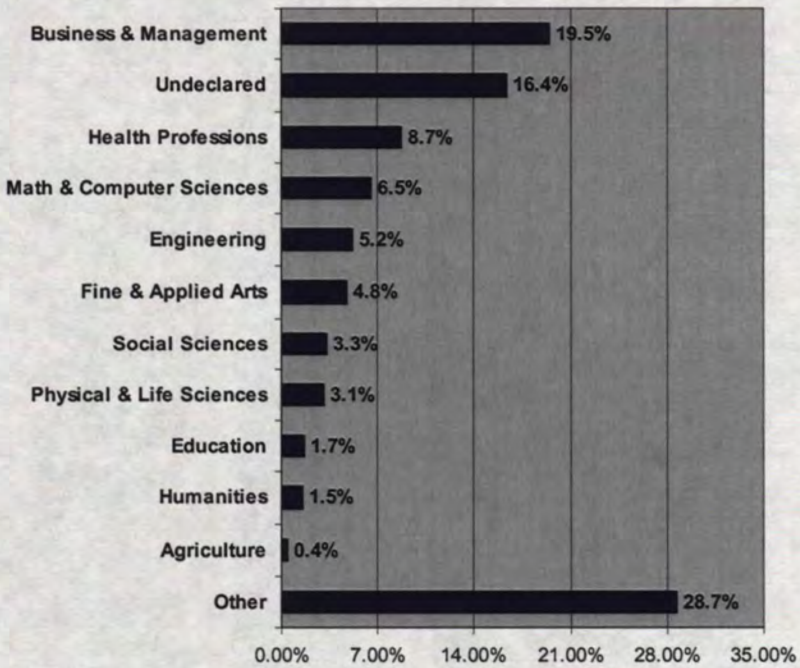
Source: IIE

Other leading sources of vocational education students included Mexico (7%), Taiwan (7%), China (6%) and Columbia (5%). Six of the top ten source countries were Asian, including four of the top five – Japan, South Korea, Taiwan, China, India and Hong Kong. The other leading sources included Mexico, Columbia, Kenya and Canada.

As shown in Table 27, the most popular area of study amongst international students undertaking an Associate Degree in the US was Business and Management. About one in five international vocational education students in the US was studying Business/Management (20%).

No other field of study attracted more than 9% of all the international population. Health professions (9%), Math/Computer Science (7%), Engineering (5%) and Fine and Applied Arts (5%) were the other leading areas of study amongst international students.

Table 27 Most popular fields of study amongst international students in the US undertaking an Associate's Degree 2003/04



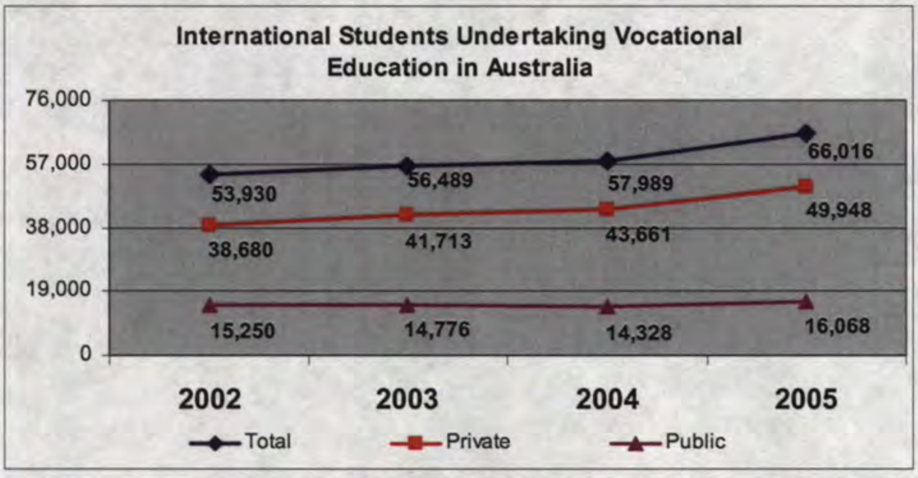
Source: IIE

Destination Australia

Australia has become one of the key providers of international vocational education (Voc Ed). In 2005, more than 65,000 international students undertook Voc Ed in Australia (see Table 28). The majority of international students are enrolled at private institutions (49,948 in 2005) although public institutions attract a large number of international students as well. Overall, international Voc Ed enrollments have increased by 22% since 2002. Year-to-date data through August 2006 (71,241) shows that international Voc Ed enrollments in Australia have already surpassed total enrollments for 2005 and 2006 Voc Ed enrollments are up 25% compared to comparable data for the previous year.

Most of this growth has occurred in non-government institutions or private schools. Over the four year period 2002 to 2005 international Voc Ed enrollments at private institutions increased by 29% compared to 5% growth amongst public institutions. However there was a significant increase (12%) in international enrollments at public institutions in 2005 – just less than the 14% growth recorded by private institutions.

Table 28 Total number of international students undertaking vocational education in Australia by provider type (2002-2005)



Source: Department of Education Science and Training (DEST)

The leading sources of international Voc Ed students in Australia are presented in Table 29. Chinese enrollments accounted for 18% of all international enrollments in this sector in 2005. The number of Chinese students undertaking Voc Ed in Australia more than doubled between 2002 and 2005, increasing from 5,672 to 12,396.

Other leading sources of Voc Ed students include Hong Kong, Japan, Thailand, and South Korea. In 2005, there were more than 4,000 Voc Ed students in Australia from each of these countries. Only one of the top ten source countries was from outside of Asia – Brazil. In 2005 2,364 Brazilians undertook Voc Ed in Australia.

Brazil (whose enrollments grew by 92% from 2002 to 2005) was also one of the leading growth markets along with Bangladesh (124%), China (115%), and India (73%).

Conversely, enrollments of students from Indonesia (-30%), Hong Kong (-12%) and South Korea (-4%) have declined since 2002, although South Korea enrollments did increase from 2004 to 2005 by 26%.

Table 29 Overseas vocational education students in Australia by leading source countries/regions (2002-2005)

	2002	2003	2004	2005	% Growth 02-05	% Growth 04-05
China	5,672	7,703	9,962	12,196	115.0%	22.4%
Hong Kong	5,884	6,105	5,655	5,170	-12.1%	-8.6%
Japan	3,959	4,669	4,822	4,931	24.6%	2.3%
Thailand	3,629	4,354	4,324	4,931	35.9%	14.0%
South Korea	4,730	3,806	3,605	4,554	-3.7%	26.3%
India	2,240	1,424	1,596	3,874	72.9%	142.7%
Indonesia	5,236	4,734	4,054	3,647	-30.3%	-10.0%
Bangladesh	1,046	1,371	1,965	2,350	124.7%	19.6%
Brazil	1,232	1,301	1,600	2,364	91.9%	47.8%
Malaysia	1,991	2,193	2,063	2,116	6.3%	2.6%
Total Aust	***53,930***	***56,489***	***57,989***	***66,016***	***22.4%***	***13.8%***

Source: DEST

Business Administration/Management has continued to be the most popular field of study for international Voc Ed students in Australia. Approximately 26,000 international students were undertaking a Business related course in 2005 (see Table 30). Services/Hospitality/Transport is the second most popular field of study. Together these subject areas accounted for nearly two-thirds (65%) of all international Voc Ed students in 2005.

Other popular fields of study included Computer Science/IT, Arts/Humanities & Social Science and Health/Community Services. In 2005, there were at least 2,500 international students enrolled in Voc Ed programs in these subject areas.

Amongst the leading fields of study Economics, Nursing, Services/ Hospitality/Transport and Health/Community Services are experiencing the most growth while Business Administration/Management, Arts/Humanities & Social Sciences, Education and Visual & Performing Arts have experienced the most limited growth in student numbers.

Table 30 International vocational educations students in Australia by field of study (2002-2005)

	2002	2003	2004	2005	% Growth 02-05	% Growth 04-05
Business Admin/Mgmt	21,396	22,939	24,208	25,956	21.3%	7.2%
Services, Hospitality, Transport	7,940	9,637	11,275	16,867	112.4%	49.6%
Computer Science/IT	14,166	11,608	8,798	7,105	-49.8%	-19.2%
Arts, Humanities and Soc Sci	2,751	2,927	3,252	3,626	31.8%	11.5%
Health, Community Services	1,444	1,798	2,031	2,742	89.9%	35.0%
Engineering, Surveying	885	1,073	1,283	1,623	83.4%	26.5%
Visual and Performing Arts	1,168	1,330	1,503	1,646	40.9%	9.5%
Multi-Field Education	1,458	1,683	1,585	1,539	5.6%	-2.9%
Education	896	1,038	1,085	1,176	31.3%	8.4%
Nursing	69	217	452	708	926.1%	56.6%
Economics	44	173	522	658	1395.5%	26.1%
Land and Marine Res, Animal Hus	340	362	385	459	35.0%	19.2%
Physical Sciences	148	244	269	554	274.3%	105.9%
Architecture, Building	341	360	393	407	19.4%	3.6%
Language Studies	205	380	370	331	61.5%	-10.5%
Life Sciences	221	275	232	311	40.7%	34.1%
Science	258	220	143	128	-50.4%	-10.5%
Medical Science, Medicine	84	94	73	64	-23.8%	-12.3%
Dental Services	66	79	63	48	-27.3%	-23.8%
Pharmacy	27	22	27	34	25.9%	25.9%
Veterinary Science	13	22	28	23	76.9%	-17.9%
Mathematics	8	7	7	5	-37.5%	-28.6%
Law, Legal Studies	2	1	5	6	200.0%	20.0%
Total	***53,930***	***56,489***	***57,989***	***66,016***	***22.4%***	***13.8%***

Source: DEST

Traditionally, the majority of international Voc Ed students in Australia have undertaken a Diploma. As shown in Table 31, in 2005, 57% of international Voc Ed students (or 37,944 students) were pursuing a Diploma (down from 62% in 2002). There were also significant numbers of international students who were studying an Advanced Diploma (14,544 students in 2005), Certificate IV (6,229), Certificate III (5,588) or Certificate II (1,358). The number of international students seeking an Advanced Diploma has grown by 86% from 2002 to 2005.

Table 31 International vocational education enrollments in Australia by level of study (2002-2005)

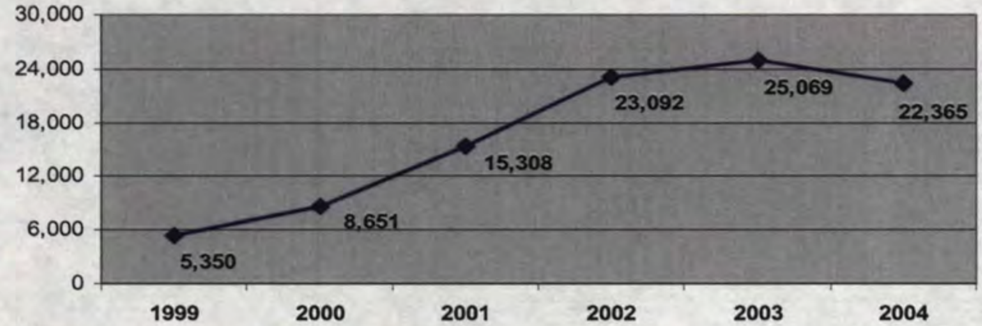
	2002	2003	2004	2005	% Growth 02-05	% Growth 04-05
Diploma	33,380	35,241	35,199	37,944	13.7%	7.8%
Advanced Diploma	7,822	8,287	10,383	14,544	85.9%	40.1%
Certificate IV	6,204	6,151	5,542	6,229	0.4%	12.4%
Certificate III	4,466	4,877	4,997	5,588	25.1%	11.8%
Certificate II	1,409	1,506	1,535	1,358	-3.6%	-11.5%
Certificate I	152	270	328	331	117.8%	0.9%
Certificate	275	69	0	0	-100.0%	na
Associate Diploma	194	87	1	0	-100.0%	-100.0%
Advanced Certificate	28	1	0	0	-100.0%	na
Vocational Graduate Certificate	0	0	4	21	na	425.0%
Vocational Graduate Diploma	0	0	0	1	na	na
Total	***53,930***	***56,489***	***57,989***	***66,016***	***22.4%***	***13.8%***

Source: DEST

Destination New Zealand

The number of international students undertaking vocational education in New Zealand has grown significantly in recent years – from 5,350 in 1999 to as many as 25,069 in 2003 before declining somewhat in 2004 to 22,365 (see Table 32). Although enrollments declined by 11% in 2004, international enrollments increased four-fold in New Zealand between 1999 and 2004.

Table 32 Trends in New Zealand international vocational education enrollments 1999-2004



Source: New Zealand Ministry of Education

The vast majority of international vocational education students in New Zealand are from Asia. In 2004, 88% of such students were from Asia compared to 4.3% who were from Europe, 3.5% from the Pacific region, 1.3% from North America and 1% from Africa (see Table 33). Less than 1% of the students were from Central/South America and the Middle East

Table 33 International vocational education enrollments in New Zealand by region of students

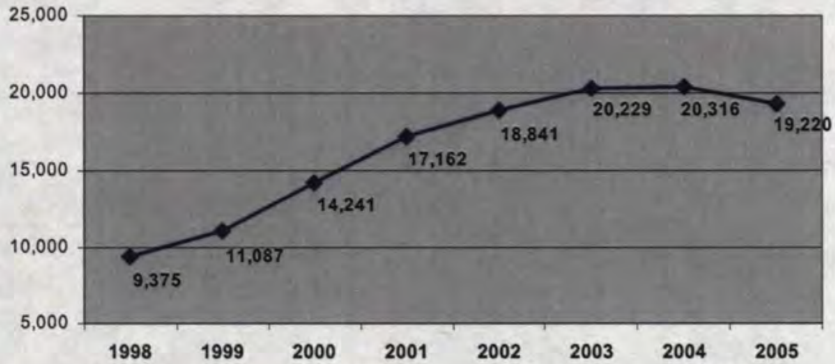
	1999	2000	2001	2002	2003	2004	% Change 99 - 04	% of Total 2004
Asia	4,188	7,380	13,266	20,496	22,545	19,707	370.6%	88.1%
Europe	321	366	594	851	856	951	196.3%	4.3%
Pacific	546	629	958	1093	830	787	44.1%	3.5%
North America	87	122	168	207	258	287	229.9%	1.3%
Africa	43	63	128	168	225	227	427.9%	1.0%
Central/South America	34	72	123	188	229	207	508.8%	0.9%
Middle East	20	19	70	89	117	164	720.0%	0.7%
Total	5,350	8,651	15,308	23,092	25,069	22,365	318.0%	

Source: New Zealand Ministry of Education

Destination Canada

International vocational educational enrollments have more than doubled in Canada since 1998 increasing from 9,375 in 1998 to 19,220 in 2005 (see Table 34). International enrollments in this sector grew considerably from 1998 to 2003 but have been flat since – enrollments even decreased by 5% from 2004 to 2005.

Table 34 International enrollments in vocational education (trade) in Canada



Source: Citizenship and Immigration Canada (CIC)

We are not able to report on trends regarding where international students in Canada are from as CIC does not track International vocational education enrollments in Canada by source country/region.

According to the OECD, *"Canada has the highest level of tertiary attainment in the OECD: 45% of 25-to-64 year-olds hold a tertiary degree – 20 percentage points above the OECD average (25%). The high level of tertiary attainment in Canada mainly results from higher participation in and completion from tertiary-type B programmes in comparison with other OECD countries. Although other OECD countries have more than 20% of their 25-64 population holding a tertiary-type A qualification, Canada also has a tradition of vocational education at the tertiary level, with 22% of the population holding a tertiary-type B qualification, compared to only 9% in the OECD."*[6]

[6] Education at a Glance 2006: Draft OECD Briefing Note for Canada, OECD.

2.3 LANGUAGE TRAINING MARKET

English and French as Second Language Markets

The language training industry is a worldwide market consisting of many languages taught both in countries where the language is native to that country (and cultural immersion is an added bonus) and also in non-native countries where it is a foreign language.

Canada is a unique market, being a bilingual nation with two official languages - English and French. French is also the one and only official language in Quebec, where most native French speakers live, and it shares the title as co-official language with English in New Brunswick. These two languages have been taught by Canadian institutions to students from all over the world for over 100 years.

For these reasons it was important to consider the two language training opportunities that exist within Canada: the English Language (EL) market and French Language (FL) market. Unfortunately, sources that report comprehensive language training data for Canada (EL or FL) [or France, the major competitor in the provision of French Language training] are either not readily available or do not exist so the following analysis of the language training industry is a review of the EL market including the leading destinations for study.

Global Overview of the English Language Market

In analyzing major EL destinations the most reliable data sources available have been used. However, because of the way in which data is reported and collected by the different destination countries it is difficult to make comparisons across destinations; instead the data is better used to gain an understanding of the market within a particular country. Therefore, the summary chart provided in Table 1 should be seen as an estimated representation of the global EL market in the leading English speaking destinations, not as a definitive assessment and comparison of the destinations total populations. It should also be noted that the actual size of many of the markets are underestimated given the methodologies many of the data sources use (some sources only report on a portion of the market – for example, only those students on a student visa, students at private institutions and students at member institutions etc.)

Traditionally the key destination markets for English language training have been the UK, Ireland, the US, Canada, Australia, Malta and New Zealand.

Over the past few years international student enrollments for EL programs have, for the most part, been increasing. Enrollments peaked in four of the six countries - UK, Australia, Ireland and Malta - in the latest year in which data is available for each of those countries (2004, 2005, 2005 and 2004 respectively) and US enrollments increased in 2004 - the first rise in EL student numbers in the US since the year 2000.

Table 35 Global trends in the English Language market – international student enrollments

	1998	1999	2000	2001	2002	2003	2004	2005	Average Ann Growth	% Growth 04 - 05
United Kingdom	184,838	172,091	169,265	156,300	195,167	231,102	256,010	na	6.4%	10.8%
Australia	49,442	62,805	66,287	81,053	79,418	78,338	91,129	101,087	14.9%	16.3%
New Zealand	16,963	15,718	18,054	26,203	41,725	71,503	50,689	51,456	29.0%	-29.1%
United States	44,021	73,357	85,238	78,521	51,179	43,003	44,565	na	0.2%	3.6%
Ireland	na	na	na	71,000	76,000	91,000	94,000	108,000	13.0%	3.3%
Malta	na	na	41,515	52,680	53,975	53,241	55,578	na	8.5%	4.4%

Sources:
UK – English UK.
Australia – English Australia
New Zealand – New Zealand Ministry of Education
US – *OpenDoors*. The Institute of International Exchange (IIE)
Ireland – *The Survey of Overseas Travelers, Perspectives on Irish Tourism*. Bord Failte
Malta – *Education Statistics*, National Statistics Office Malta

There have also been concerns for the EL market in recent years in many of the leading destinations. For instance, the number of students undertaking EL training in the US halved between 2000 and 2003. The UK experienced consistent declines in its student numbers between 1998 and 2001, although more recently enrollments have improved. Enrollments in Australia declined from 2001 to 2003 before rebounding and reaching a high in 2005. New Zealand, which experienced incredible growth from 2000 to 2003, had a major setback in 2004 when student numbers decreased by 29% in that year alone. Perhaps these are all signs that, although the global market for EL continues to be very large, the demand for courses in a particular country can be relatively fickle and is likely to be impacted by a number of factors, many of them external.

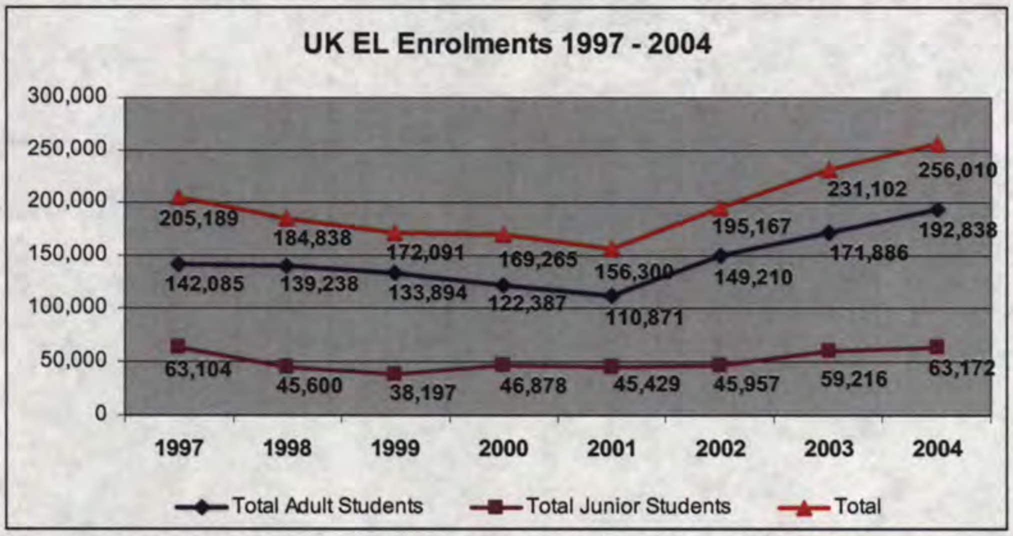
Destination UK

The UK is regarded as the leading destination for EL students. The most reliable EL data for the UK is supplied by English UK but this organization only collects information on member institutions, which are all private, so students at public institutions and non-member schools are not included in this data. As a result, English UK data significantly underestimates the real size of the EL market in the UK – a fact supported by information taken from the Overseas Passenger Survey, which is conducted every three years by the British Tourist Authority (BTA). That survey estimated the size of the UK EL sector to be 669,000 in 1996 before declining to 449,000 in 2002. These figures are significantly higher than those reported by English UK but the BTA has not released data since the 2002 survey and JWT Education believes that the data collected and reported by English UK is the most reliable available and provides a good indication of EL market trends within the UK. Therefore, the following analysis of the UK market is based on information provided by English UK.

UK enrollments have apparently gone through two periods. From 1997 to 2001 student numbers declined every year (from 205,189 in 1997 to 156,300 in 2001). However, since 2001 enrollments have continually increased and in 2004 enrollments peaked at over 256,010. Overall, student weeks have increased by nearly a quarter (24.8%) since 1997.

Preliminary data for 2005 shows mixed results. The EL sector's key measurement is student weeks - one student week is calculated as one student undergoing not less than 10 hours of tutition in one week. Student week statistics for Q1 2005 indicate that student weeks increased by 18% over Q1 2004 (137,478 in 2004 to 162,217 in 2005). However, there was a 23% increase in the number of centers who reported figures in 2005. This would actually suggest a modest decline for 2005. However, Q4 data for 2005 shows a decline in enrollments by 3%, with about a 26% decline in the number of returns, which would indicate that the market should actually be stronger in 2005. The number of student weeks in Q4 decreased from 159,276 in 2004 to 154,093 in 2005.

Table 36 Approximation of UK EL enrollments 1997-2004 (adult students vs. junior students)



Adult students – one who participates in a course normally designated for students aged 18 and over
Junior students – one who participates in a course normally designated for students under the age of 18
Source: English UK

It is important to realize that these enrollment statistics are estimates. English UK approximates the number of students each year based on the total number of student weeks reported by its member schools. Member schools are asked to report back to English UK at the end of each quarter and it is mandatory that they submit annual data. From these surveys English UK is able to calculate the average number of weeks an EL student undertakes study for in the UK for a particular year. Estimates of annual student numbers are therefore based on total students weeks and average weeks of study for a particular year.

Because enrollment figures are based on total student weeks it may be more appropriate to examine trends in student weeks rather than actual student numbers. Similar to the outcomes seen above for enrollments, student weeks declined from 1997 to 2001 and then increased from 2001 to 2004. Overall student weeks increased by 18.9% over this time and peaked at almost 1.25 million in 2004 (see Table 3). Encouragingly, student weeks increased by 11.8% from 2003 to 2004.

The leading source countries/regions for the UK are presented in Table 37. Most students undertaking EL in the UK are from Europe (51%) and Asia

(33%). Student weeks varied significantly from year-to-year amongst almost all source countries – although they did tend to decrease from 1997 up to the year 2001 and increase after that. The top sources of students in 2004 were Japan and South Korea – together they accounted for about 20% of all student weeks. Although Japan is the leading source market, student weeks completed by Japanese students have actually declined by 20% since 1997. South Korean student weeks, on the other hand, have grown considerably, especially since 1999 (356%). The other leading Asian source country is China (including Hong Kong) and nearly 100,000 student weeks were completed by Chinese students in 2004, making China the fourth largest source for the year. Chinese student weeks increased by 74% between 1999 and 2004, although enrollments declined by almost 21% in 2004.

Table 37 Student weeks by region/country (1997-2004)

	1997	1998	1999	2000	2001	2002	2003	2004	Annual % Change	% Change 03 - 04
Japan	170,100	147,185	137,985	128,674	123,626	135,204	130,155	135,347	-2.9%	4.0%
South Korea	75,600	31,610	26,331	56,296	66,928	96,130	101,116	120,262	8.4%	18.9%
Italy	129,150	87,916	113,177	91,367	87,489	77,108	74,940	105,177	-2.7%	40.3%
China/Hong Kong	-	-	26,201	44,102	58,134	115,767	125,481	99,506	56.0%	-20.7%
Brazil	54,600	76,062	45,986	33,131	35,634	34,354	42,477	80,837	6.9%	90.3%
Spain	70,350	53,342	58,379	53,330	45,930	53,863	56,446	70,334	0.0%	24.6%
Switzerland	60,900	38,525	55,034	51,021	52,599	62,444	56,341	60,635	-0.1%	7.6%
France	44,100	66,184	44,064	43,336	33,041	45,727	43,819	51,983	2.6%	18.6%
Russia	43,050	34,574	23,064	22,105	28,483	36,796	35,963	44,699	0.5%	24.3%
Germany	48,300	66,184	37,302	40,285	37,288	39,344	41,582	44,604	-1.1%	7.3%
Rest of Europe	185,850	180,771	150,873	169,836	130,696	153,731	179,432	181,958	-0.3%	1.4%
Rest of Lat. America	54,600	85,940	63,606	65,579	74,169	86,484	83,587	86,104	8.2%	3.0%
Middle East	-	-	37,979	40,077	44,724	55,770	68,760	83,853	24.2%	22.0%
Rest of Far East	53,550	75,074	34,511	41,958	39,985	50,882	49,782	60,569	1.9%	21.7%
Rest of the World	59,850	44,452	23,272	15,264	16,893	20,492	26,314	22,031	-9.0%	-16.3%
Total	1,050,000	987,817	877,764	896,361	875,619	1,064,096	1,116,194	1,247,899	2.7%	11.8%

Source: English UK

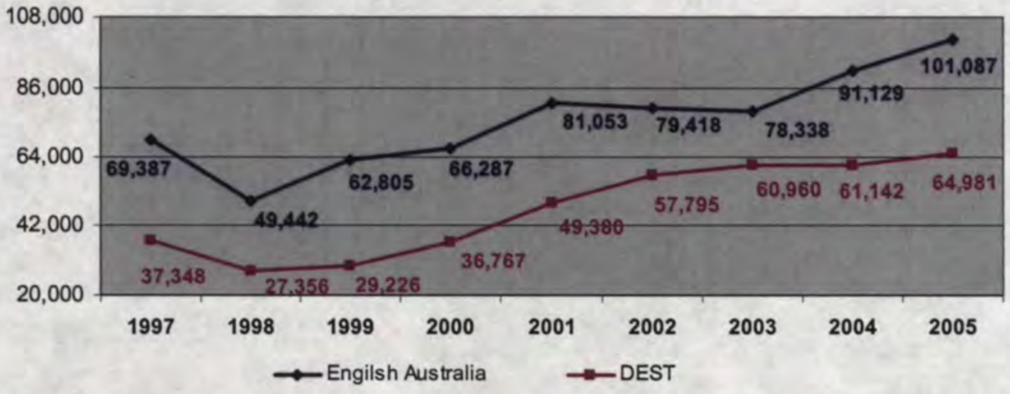
Destination Australia

Data presented in this section was taken from either English Australia's 2004 survey of major ELICOS (English Language Intensive Courses for Overseas Students) regional markets, or from the Department of Education Science and Training (DEST).

English Australia (EA) is the representative body for quality public and private English language colleges in Australia. Over 85% of students learning English in Australia study at an English Australia college. English Australia colleges deliver 87% of EL tuition in Australia and their figures estimate student visa enrollments on EL programs as well as other visa types. English Australia will be the primary source for ELICOS data in this report as it attempts to estimate the total size of the EL market. DEST data only accounts for those students in Australia on a student visa (and does not include students undertaking English courses on other types of visas – such as a holiday visa or a working holiday visa) and therefore under-represents the total number of students enrolled in EL courses in the country.

As seen in the following chart which reports both DEST and English Australia data, the demand for Australia EL courses rose steadily from 1998 with the majority of students undertaking EL courses in Australia having consistently been from Asia. As Table 38 illustrates according to English Australia ELICOS student enrollments have increased from 69,387 in 1997 to 101,087 in 2005. Enrollments increased from 1998 to 2001, declined slightly between 2001 and 2003, and have increased significantly since 2003. It is thought enrollments increased significantly after 1998 as Asian nations started to recover from the economic crisis that impacted the region in the mid to late 1990's

Table 38 Trends in ELICOS enrollments 1998 to 2005



Source: English Australia and DEST

Data from DEST also highlights the growth in the EL market in Australia since 1998 (although it should be noted that there was a change in data collection after 2001). Keeping in mind that DEST only reports students in Australia studying on a student visa, DEST data shows an increase in enrollments from 37,348 in 1997 to 64,981 in 2005. Interestingly, English Australia reports a 29% increase in the market from 2003 to 2005 DEST reports growth of 7% during this same period. This could signal an increase in the demand for EL study in Australia from students who are undertaking courses that do not require a student visa – maybe language travel and general English students, rather than students undertaking English for academic purposes (EAP). This is supported by information supplied by English Australia that will be shown later in the report where the percentage of students who are undertaking EL programs in Australia who are on a student visa is decreasing (58% in 2003 compared to 49% in 2005).

Data recently released from DEST shows continued growth in the ELICOS sector year to date (2006) for Australia. With total enrollments increasing by 16.1% as of April 2006 compared to the same period last year and commencements increasing by 14.7%.

According to English Australia, not only did student enrollments peak in 2005, but total student weeks also reached an all time high at 1,142,016 (see Table 39). In 2005, the average ELICOS student in Australia spent 11.3 weeks studying English, below the maximum average of 12.1 weeks in 2003. The economic impact of ELICOS within Australia was estimated to be as much as $AUD 1,082 million in 2005, up from $AUD 932 million in 2004.

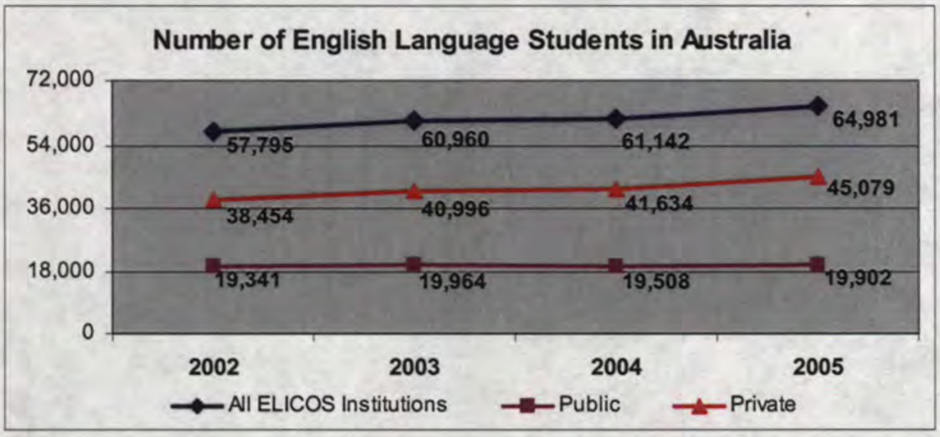
Table 39 Enrollments, student weeks and economic impact ($AUD millions) 1997-2003

	1997	1998	1999	2000	2001	2002	2003	2004	2005
Total enrolments	69,387	49,442	62,805	66,287	81,053	79,418	78,338	91,129	101,087
Total student weeks	921,477	498,706	608,715	699,315	872,921	915,867	946,241	995,918	1,142,016
Average student weeks	12.6	10.1	9.7	10.6	10.8	11.5	12.1	10.9	11.3
Total economic impact	$688.6	$377.8	$599.0	$546.8	$710.2	$802.1	$849.2	$932.0	$1,082.0

Source: English Australia

Table 40 outlines ELICOS students by provider type. As seen in the chart, the majority of ELICOS students are enrolled at private institutions. In 2005, 45,079 international students were undertaking study at private institutions (or 68% of students with visas). Enrollments at private institutions increased by 11% from 2002 to 2005 while enrollments at public institutions remained relatively flat, increasing by less than three percent.

Table 40 Total number of English Language students in Australia by provider type (2002-2005)



Source: DEST

Asia continues to be the leading source of ELICOS students in Australia. According to English Australia, since 2000 the percentage of ELICOS students from Asia has ranged from 76% in 2000 to 84% in 2004. Therefore, it is no surprise that most of the leading source countries, nine of the top 11, are Asian nations.

The leading source countries for ELICOS students are presented in Table 41. In 2005 Chinese enrollments accounted for a quarter (25%) of all ELICOS enrollments. Chinese enrollments peaked in 2005 at 16,175; however those enrollments increased more slowly from 2002 to 2005 – by 12.7%, basically the same rate as total national enrollments in that time (12.4%).

Other leading sources of English Language students include South Korea (with enrollments of 11,194 in 2005), Japan (8,063), Thailand (5,279) and Brazil (3,952). Of these four countries, Brazilian and South Korean enrollments have increased significantly since 2002; early data for 2006 (as of the end of April) from DEST shows continued growth from South Korea and Brazil. These two markets show the highest growth rate for the ELICOS sector this year with 25.1% in enrollments and 21.4% in commencements for South Korea and

73.7% and 61.5% for Brazil. In contrast enrollments of Japanese and Thai students over this time have declined.

Brazil and the Czech Republic are the only leading source countries that are non-Asian. Brazil (whose enrollments grew by 77% from 2002 to 2005), India, (1495%), Vietnam (63%) and South Korea (61%), have been the leading growth markets since 2002.

Table 41 Number of English Language students in Australia by leading source countries/markets (2002- 2005)

	2002	2003	2004	2005	% Growth 02-05	% Growth 04-05
China	14,350	14,416	14,876	16,175	12.7%	8.7%
South Korea	6,964	9,559	10,143	11,194	60.7%	10.4%
Japan	8,308	8,838	8,888	8,063	-2.9%	-9.3%
Thailand	5,945	5,806	5,081	5,279	-11.2%	3.9%
Brazil	2,236	1,784	2,358	3,952	76.7%	67.6%
Taiwan	3,603	3,802	3,463	3,288	-8.7%	-5.1%
Hong Kong	4,047	3,587	2,730	2,213	-45.3%	-18.9%
Indonesia	1,997	2,009	1,608	1,418	-29.0%	-11.8%
India	82	452	1,079	1,308	1495.1%	21.2%
Czech Republic	1,264	1,198	963	1,165	-7.8%	21.0%
Vietnam	693	756	1,035	1,129	62.9%	9.1%
Total Australia	***57,795***	***60,960***	***61,142***	***64,981***	***12.4%***	***6.3%***

Source: DEST

Declining enrollments have been recorded from students from the following countries/markets in the four year period 2002 to 2005:

- Hong Kong (-45%);
- Indonesia (-29%);
- Thailand (-11%);
- Taiwan (-9%);
- Czech Republic (-8%);
- Japan (-3%).

It should also be noted that Thai and Czech enrollments were greater in 2005 than in 2004.

English Australia reports that the majority of ELICOS students (51% in 2004) arrive in Australia on a student visa, although 31% possess a tourist visa and 11% are on a working holiday visa (see Table 42). The percentage of ELICOS students on a student visa decreased from 58% in 2003 to 51% in 2004, whereas the percentage of students on a tourist visa increased during this time from 31% to 38%.

Table 42 Visa status of ELICOS students 2003

	2003	2004	2005
Student Visa	58%	51%	49%
Tourist Visa	31%	38%	37%
Working Holiday Visa	11%	11%	14%

Source: English Australia

Australian Education International (AEI) reports that ELICOS is a key area in Australian education, as international students often undertake EL courses as a precursor to studies in other sectors.[7] An AEI Survey of the study pathways of international students in Australia over the period 2002-2004[8] showed that, of a total of 429,022 students, roughly three-quarters (327,478) enrolled in single sectors with roughly one-quarter (101,544) enrolling in multiple sectors. Of the single sector students, more than one-third (38.6% - 165,791) enrolled in Higher Education. This was followed by the ELICOS sector (13.5% - 57,285).

Of the multiple sector enrollments, most (26%) followed the pathway of ELICOS to Higher Education; while 16% followed the pathway of ELICOS to Vocational Education and Training (VET). Almost one-third of all multiple sector students were from China. The most common sectoral pathway for Chinese students was ELICOS to Higher Education (34%) and ELICOS to school (19%).

Destination New Zealand

Since 2000, New Zealand has experienced significant growth in EL students. Once only a marginal player in the industry, New Zealand is now a leading provider of EL training. Enrollments have increased from 18,054 in 2000 to 51,456 in 2005 – although enrollments were as high as 71,503 in 2003 (see Table 43). Overall student numbers increased by 185% from 2000 to 2005 but the market has not performed as well in recent years. From 2003 to 2004 the number of language students declined by 29%, although the market steadied itself in 2005.

[7] AEI: International Students in Australia and the ELICOS Sector, 2005
[8] Study Pathways of International Students in Australia, AEI, June 2005

Table 43 Number of English Language students in New Zealand 2000-2005 by leading source countries/markets

	2000	2001	2002	2003	2004	2005	% Change		% of All Students	
							00 - 05	04 - 05	2000	2005
Japan	8,815	9,014	10,122	13,736	11,840	13,417	52.2%	13.3%	48.8%	26.1%
China	2,105	5,057	11,717	27,598	18,617	11,673	454.5%	-37.3%	11.7%	22.7%
South Korea	1,884	3,826	8,193	12,283	7,845	8,663	359.8%	10.4%	10.4%	16.8%
Switzerland	771	1,363	1,124	1,615	1,561	2,332	202.5%	49.4%	4.3%	4.5%
Thailand	907	1,310	2,050	2,944	1,511	2,115	133.2%	40.0%	5.0%	4.1%
Taiwan	831	1,494	2,178	3,056	1,416	1,744	109.9%	23.2%	4.6%	3.4%
Germany	533	1,127	1,056	1,215	1,130	1,506	182.6%	33.3%	3.0%	2.9%
Brazil	226	498	882	1,046	743	1,240	448.7%	66.9%	1.3%	2.4%
Russia	90	157		383	367	970	977.8%	164.3%	0.5%	1.9%
Saudi Arabia				229	317	922	na	190.9%	na	1.8%
France	-	79		171	236	489	na	107.2%	na	1.0%
Hong Kong	319	341	514	655	325	375	17.6%	15.4%	1.8%	0.7%
World Total	*18,054*	*26,203*	*41,725*	*71,503*	*50,689*	*51,456*	*185.0%*	*1.5%*		

Source: New Zealand Ministry of Education

There have been significant increases in the number of students from most of New Zealand's leading source countries. This seems to be the product of a number of factors including, increased national marketing activity by the New Zealand Government to position New Zealand as an international education destination; the appeal of New Zealand from a migration perspective; and the weak New Zealand dollar which, in a market where the audience can be price sensitive, appears to have been a significant draw card.

In what is no doubt a reflection of its location, Asia is the key source region for New Zealand EL students. Almost five of New Zealand's top six source countries are Asian nations. In 2005, 50% of EL students in New Zealand were from either Japan (26%) or China (23%). An additional 17% of students were from South Korea. Together these three sources provided two-thirds of all EL students in 2005.

The declining number of Chinese students since 2003 is notable. Chinese EL enrollments have declined by more than half (58%) in the two year period 2003 to 2005. Although New Zealand experienced declining enrollments from its top eight source countries from 2003 to 2004, China was the only country where enrollments continued to fall in 2005. Enrollments increased from each of the other leading source countries.

Switzerland, Germany and Brazil are the leading non-Asian source countries. In 2005 more than a thousand students from each of these countries were undertaking EL programs in New Zealand.

Destination US

The US is believed to be the second leading destination for EL training. In the summary table presented in Table 35 at the beginning of this section the US had the lowest enrollments of any of the countries represented, but this is mostly the result of overall recent declines in international education in the US and the fact that US enrollment figures capture only a portion of the actual market. The most reliable data available for the US EL industry is provided by the Institute of International Exchange (IIE). The data reported by IIE is a reflection of annual surveys conducted with US schools but is mostly limited to members of the American Association of Intensive English Programs (AAIEP) and the University and College Intensive English Programs (UCIEP). Annual statistics on the US market underestimate the actual size of EL market as they mostly include only students at member institutions and only at member institutions who choose to participate in any given year.

Those caveats notwithstanding, enrollments of EL students in the US declined every year between 2000 and 2003 before leveling out in 2004. AEI offers several explanations for this including *"the events of September 11 2001, related security concerns, the subsequent changes in visa procedures and economic conditions"* as factors that continue to impact EL enrollments *"more sharply than enrollments of international students coming to the US for degree study"*. Research conducted by JWT Education[9] into the EL market indicates that many EL students are more safety conscious than their university counterparts and therefore the events of September 11 are more than likely to have impacted this market.

EL enrollments in the US peaked in 2000 at 85,238 but nearly halved by 2003 when enrollments totaled 43,003 (see Table 44). Enrollments increased by 3.6% in 2004 to reach 44,565. Between 1999 and 2004 enrollments from 14 of the top 15 source countries for the US decreased. Korea represented the only growth market over this time. Even Chinese enrollments, which increased dramatically during that timeframe in destinations such as Australia and New Zealand, decreased from 1,509 in 1999 to 1,026 in 2004.

The US is perhaps the most diverse of the major EL destinations in that the leading source countries of students are not likely to be located in just one region. Although Asian countries (Japan, Korea and Taiwan) accounted for the top three sources of EL students for the US in 2004, three of the top 11 source countries were European (Italy, France and Turkey) and four of the top 15 were South/Central American countries – Brazil, Mexico, Colombia and Venezuela. Physical location seems to be a huge draw as historically the US attracts more students from South America than any other destination, although Australia is starting to attract an increasing number of EL students from this region.

[9] The Asian Student of 2000. JWT Education, 2000. The English Language Market: A Global Review. JWT Education, 2001.

Table 44 Number of English Language students in the US from 1999 to 2004 by leading source countries

	1999	2000	2001	2002	2003	2004	% Change 99 - 04	% of All Students 1999	% of All Students 2004
Japan	17,123	19,585	16,470	13,047	10,519	10,804	-36.9%	23.3%	25.1%
South Korea	7,714	12,772	13,110	10,000	10,412	10,386	34.6%	10.5%	24.2%
Taiwan	7,591	9,325	7,605	5,919	4,235	5,126	-32.5%	10.3%	11.9%
Brazil	5,699	6,020	5,253	2,363	1,359	1,402	-75.4%	7.8%	3.3%
Turkey	1,241	2,118	2,254	1,102	1,034	1,133	-8.7%	1.7%	2.6%
France	1,704	1,683	1,587	1,231	1,156	1,093	-35.9%	2.3%	2.5%
Thailand	1,381	2,009	1,929	1,245	943	1,088	-21.2%	1.9%	2.5%
China	1,509	1,839	1,760	1,048	796	1,026	-32.0%	2.1%	2.4%
Germany	1,739	1,332	1,396	1,199	849	950	-45.4%	2.4%	2.2%
Mexico	1,513	2,797	4,369	936	883	949	-37.3%	2.1%	2.2%
Italy	2,297	2,471	1,924	1,171	1,408	917	-60.1%	3.1%	2.1%
Switzerland	2,839	1,494	1,584	1,564	732	729	-74.3%	3.9%	1.7%
Spain	1,004	1,265	742	539	728	721	-28.2%	1.4%	1.7%
Colombia	2,416	2,549	2,255	1,089	858	700	-71.0%	3.3%	1.6%
Venezuela	1,830	2,614	2,487	1,216	742	648	-64.6%	2.5%	1.5%
World Total	**73,357**	**85,238**	**78,521**	**51,179**	**43,003**	**44,565**	**-39.2%**		

Source: Institute of International Exchange (IIE)

As suggested above, Asia is the leading source of EL students for the US. In 2003 Asian students comprised 65% of EL enrollments in the US. Significant amounts of students also came from Europe (16%) and Latin America (13%).

Destination Canada

No Canadian organisations collect or report enrollment data on the language training market. The best sources of student data in Canada, Citizenship and Immigration Canada and Statistics Canada, do not report enrolments for the language training industry.

Perhaps the best information pertaining to the language training industry can be taken from the *'Student Profile Survey'* conducted by The Canadian Association of Private Language Schools (CAPLS). The latest version of this survey, administered by the association in October 2004, included 1,457 students at 34 private schools. It is important to note that member schools, all private schools, are represented in the survey.

The survey revealed the following characteristics of the language student population in Canada[10]:

- 68% were between the ages of 20 to 29;
- most were female (53%);
- the overwhelming majority of students were undertaking EL courses (96%), with the remaining enrolled in FL or a combination of FL and EL courses;

[10] Canadian Private Language Schools Student Profile Survey. CAPLS

- 55% were studying in Canada on study permits and 40% were studying on a visitor/tourist visa or a temporary resident visa;
- 23% of the foreign students came to Canada to study at their language school for 3 months or less, 68% planned to study in Canada for between 3 months and a year, and 9% intended to undertake study for more than a year;
- 38% of students were paying for their language studies themselves and 59% were funded by their parents;
- most students reported that they found out about their language programme from an agent (reported by 60% of the students), friend/relative (19%) or from a website (11%);
- the top three reasons students chose to study in Canada was because it is a safe country, value for money and because it is a great place to live;
- the largest percentage of language students are from Korea (28%), Japan (19%), Mexico (17%), Switzerland (8%) and Brazil (5%).

Other data relating to the language training industry in Canada has been obtained from Language Travel Magazine's Annual Status Survey, which uses market data gathered from member institutions (comprising education facilities worldwide) who participate in the Survey each year, to present information on the main international language teaching markets. In presenting this data it must be highlighted that this survey represents only a very small number of schools in Canada compared to the total number of EL providers in this country. That said, the data provides, at least, some information on the market.

Language Travel's Status Survey reports on the Canadian market for 2004 (drawing on survey results from 44 participating member institutions in Canada) and for 2005 (results from 43 institutions) showed that its top 6 source markets – base on student weeks – were the same in 2004 and 2005 (although not in same order):

- in 2004, they were, in order from 1st to 10th: Korea, Japan, China, Mexico, Taiwan, Brazil, Switzerland, Vietnam, France and Germany;
- in 2005: Korea, Japan, Mexico, Brazil, Taiwan, China, Canada, Saudi Arabia, Switzerland, and Spain.

The most dramatic change was recorded in the Chinese market, which declined from 14.7% of total student weeks in 2004 to 4% in 2005. Other notable changes in the percentage of student weeks contributed by source markets were:

- a 4.6% growth in student weeks from Korea, which remained the leading source market;
- a 3.1% growth in the Japanese contribution, which was again the second largest market for Canada;
- a 2.2% growth in student weeks from Brazil;

- the disappearance of Vietnam, France and Germany from the 'Top Ten' source markets, these were replaced by Canada, Saudi Arabia and Spain.

Table 45 Top student nationalities in Canada by students weeks – 2004 and 2005

	2004	2005
South Korea	18.8%	23.4%
Japan	15.5%	18.6%
Mexico	11.8%	12.8%
Brazil	4.8%	7.0%
Taiwan	5.2%	5.3%
China	14.7%	4.7%
Canada	na	3.5%
Saudi Arabia	na	3.0%
Switzerland	3.4%	2.4%
Spain	na	1.5%
Vietnam	2.8%	na
France	2.2%	na
Germany	2.2%	na

Source: Language Travel Status Survey

In 2005 the Canadian EL industry seemed to expand. Comparing data from the 2004 and 2005 Status Surveys, it can be seen that the total number of student weeks reported by participating organizations increased by 38.3% (from 367,024 in 2004 to 507,807 in 2005). It should be noted, however, that the number of Canadian organizations who completed the survey in 2005, compared to 2004, increased by 26% (43 and 34, respectively); although this increase was less than the 38% growth in student weeks.

While it would seem from both the data presented here and anecdotal feedback that numbers of EL students studying in Canada has increased in recent years, it is difficult to ascertain by what percentage and whether this trend looks likely to continue. In the absence of any further branding activity to position Canada as an international education destination, Canada would appear to be at risk from growing competition from both the Major English Speaking Destination Countries (MESDCs) as well as some of the other destinations.

3. Target Audience

Primary Target Audience

The Education Canada Brand's primary target audience comprises prospective students who wish to pursue an international education in the following segments:

- undergraduate;
- postgraduate;
- language – English or French;
- further education;
- school.

Within the development of the Education Canada brand, research into the needs and wants of each target audience will be imperative. Data issues currently make it difficult to pinpoint accurately the numbers within, and composition of, each segment.

The following represents key insights and data currently available regarding the Undergraduate and English Language segments.

Undergraduate Segment

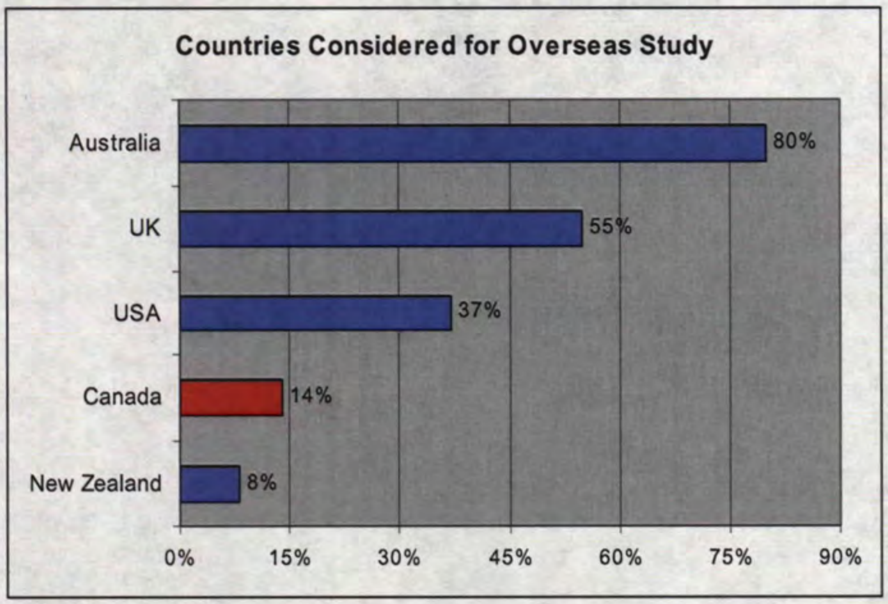
In profiling this market segment and understanding the key decision-making factors behind undergraduate students' international education purchases, it is helpful to draw upon research which has been undertaken into this group. For example, the *JWT Asian Student of 2005 Survey*, which followed similar studies undertaken in 2000 and 1997, and examined the attitudes and perceptions of more than 500 Asian undergraduate students studying in Australia and the UK, from the 10 major source markets – China, India, Hong Kong, Singapore, Taiwan, South Korea, Thailand, Indonesia, Japan and Malaysia. This Survey explored issues including when students' decisions are made, how information is sourced, key selection criteria, standards of education and influencing factors. It gives a good insight into the purchase criteria of the prospective international undergraduate student target segment. For instance, it showed that quality and value for money are among the factors those prospects consider most when selecting a destination for international study:

- 40% of Asian international undergraduate students choose to study overseas in order to access a better quality of education;
- the most important factors when considering a country for overseas study were quality of education/university; and cost of undertaking study/value for money;
- and the principal reasons students said they finally chose to study in a particular destination were: better quality of education, cheaper living expenses, it offered particular courses they wanted, and the tuition fees were cheaper than many other countries.

Importantly, the Survey also showed that students were more likely to choose a destination country before selecting their course or university.

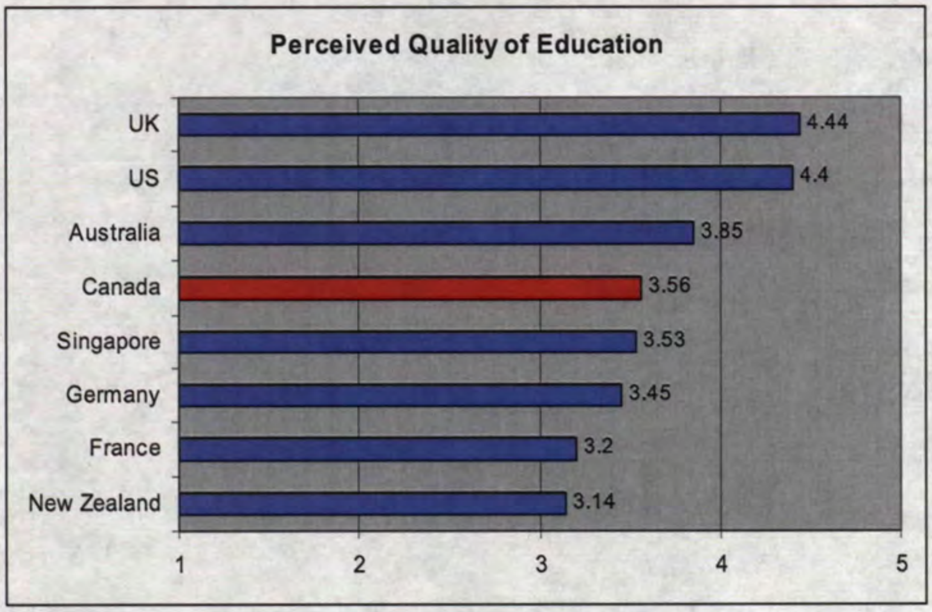
The countries the students in this research considered for overseas study showed that few participants had contemplated Canada:

Table 46 Countries considered for overseas study



Canada also only scored a middle ranking against a 1-5 rating, where 1 = very poor and 5 = excellent for perceived quality of education:

Table 47 Students' perceptions of the quality of education available in particular destinations (overall mean ratings where 1 is very poor and 5 is excellent)



Language Segment

A 2004 Canadian Association of Private Language Schools (CAPLS) Survey which profiled students of Canadian private language[11] schools found that:

- sixty eight percent (68%) of the students are aged between 20-29 years;
- most of the students are enrolled in EL programs;
- fifty eight percent (58%) came from an Asian country – Korea (28%) and Japan (19%) were the biggest sources;
- many EL students go to Canada because they perceive it as a safe place to study, offers value for money, is a great place to live, with beautiful nature – and has quality schools;
- most EL students study in Canada for three months to one year;
- most are on study permits, though 40% are on visitor/tourist or temporary resident visas;
- most are work-experienced postgraduates who want to enhance their education or career. They are highly motivated and ambitious, and 58% are studying EL for work purposes;
- 38% were paying for their study themselves, while 59% said that their parents were paying for their study;
- the overwhelming majority of students were undertaking EL courses (96%), with the remaining enrolled in FL or a combination of FL and EL courses.

[11] CAPLS Student Profile Survey, November 2004

Secondary Target Audiences

The secondary target audiences for the Education Canada Brand include Key Influencers on prospective students' study. Such secondary target clusters would include:

- parents
- agents
- teachers (final 2 years of high school)
- undergraduate faculty
- careers advisors
- study abroad advisors
- alumni
- employers
- government in source country
- government organisations in source country e.g. British Council; Australian Education International (AEI)/International Exchange Programs (IEP); CEC
- scholarship providers

Research has shown the importance of these 'influencers' on the international student purchase decision.

For example, in the above-described *JWT Asian Student of 2005/6 Survey*:

- parents were rated a 3.97 level of influence on study decisions, out of a possible rating of 1-5, where 1= no influence and 5 = a great deal of influence. Parents were also the main source of funding for students' studies for most survey participants;

- teachers' potential influence was highlighted in the fact that 87% of students first thought about studying overseas while they were still at school;

- it was evident that students are increasingly turning to agents for assistance with their study purchases. Results from the Australian component of the Survey (over 300 Asian students studying in Australia at 10 universities, across a range of disciplines) highlighted the increasing use of agents by students - both as a source of information when selecting an overseas institution and as the main link in the purchase decision, with growing numbers of students using an agent to submit their application. This is despite the efforts of many universities during that time to encourage more direct applications and a reduction in the dependence on agents. The outcome has been that agents have increased their position from being simply a provider of information to also being a source of influence.

  Additionally, a 2004 study by CAPLS into private language school students in Canada showed that 60% of the 1500 students surveyed found their language program via an agent.

Further, the *Global Directions in Language Travel 2005 Survey* conducted by JWT Education for ALTO (the Association of Language Travel Organisations), found that Language Schools rely primarily on international agents to source students – survey participants reported receiving an average of 58% of their students from international agents.

4. Competitor Brands

Overview

As seen in Section 2, educational services are a key and growing sector of the international economy. The international education market within which Canada is operating is characterized by:

- increasing growth in student numbers – albeit at slower rates in recent years, most likely a result of terrorism-related security concerns and improved domestic education infrastructure in source markets. The global demand for international student places in English-speaking countries is projected to increase by 160% over the next 15 years to a total of 2.6 million. East Asia and South Asia, with China and India in particular, will lead the demand; [12]

- increasing competition among established major players and from traditional source countries such as Singapore, India, Hong Kong, Malaysia, Thailand and China who are emerging as study destinations in their own right.

- Apparently on-going competition from France for French language study. Relevant data, however, was not readily available for this study.

In response to the developments in the English-speaking sector, Canada's main competitors, the other major English-speaking destinations for international students - the United Kingdom, Australia, the United States and New Zealand - have implemented changes and introduced initiatives in international education policy in recent years in an attempt to boost their share of international student numbers and to remain competitive in the market.[13] While most have had international education promotional programs to varying extents in the global market for many years, these programs are increasingly supported by aggressive government sponsored incentives. For example Australia recently invested $AUD 113 million in marketing education internationally and the UK has launched a multi-million pound campaign. In the past few years the New Zealand government has adopted a strategic approach to developing the sector[14] and is currently looking at re-positioning its national education brand.

Competitive environment research conducted by Foreign Affairs Canada showed that of all the countries examined only Canada and the US did not have *"nationwide agendas for international education promotion and marketing"*[15]. The research also suggested, *"that pursuing a coordinated approach is a strong indicator for a successful international education program"* and, *"the lack of organization can lead to branding Canada as an uncoordinated and*

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[12] "Vision 2020: Forecasting International Student Mobility", IDP Education Australia, in The National Report on International Students in Canada 2002 (CBIE)
[13] AEI Papers – "Australia's Competitors in International Education" March 2006 Update and July 2005 Update
[14] BC Progress Board: "The Role of International Education: Expanding Student Opportunity and Economic Development in British Columbia," 2005
[15] "Sustainability Strategy: Live, Learn and Succeed", Foreign Affairs Canada, March 2005.

complicated country in the face of more uniform brands found in countries such as the United Kingdom, France and Australia".

The brand positioning of the principal competitors for Canada's international education industry will be considered separately.

United Kingdom

The UK international education industry has been estimated to be worth 10 billion pounds.[16] It has grown enormously in recent years – for example, the number of international students from non-EU countries studying higher education in the UK increased every school year from 96/97 (109,940) to 03/04 (186,840). Growth in that sector has been very strong since 99/00 with enrolments increasing by 72.3% in the following four-year span (source: UK Higher Education Statistics Agency). The British Council attributed that substantial increase to the enhanced accessibility to the UK; as a result of changes to immigration, a successful global marketing and branding campaign, increased efforts by the higher education sector and growth in key markets.[17]

Following this increase (since 2004) there appears to have been softening in demand for the UK from some primary source markets, especially from the Chinese market. Overall international student enrolments levelled out in 2005. These results are possibly due in part to increased visa costs/cost of studying in the UK, few opportunities to gain work experience and problems with visas and the increasing quality of education services offered domestically in former source markets such as China.

UK Brand Positioning

The United Kingdom has perhaps been the most active of Canada's competitors in establishing a sophisticated national education brand – Education UK.

Education UK
Innovative. Individual. Inspirational.

Current positioning uses the elements "Education UK – *innovative, individual, inspirational", "the right solution"* and the slogan, *"the best you can be."*

As reported above, the UK's implementation of a global marketing and branding campaign has been partly the reason for the substantial increases in international student numbers since the start of this decade, enabling it to retain its position as the second most popular destination for higher education amongst international students behind the US.

[16] British Council website http://www.britishcouncil.org
[17] From: The National Report on International Students in Canada (CBIE).

That branding campaign has been part of the Prime Minister's Initiative (PMI) – which initially ran from 1999-2005 and was designed to increase the number of international students studying in the UK and to encourage collaboration between universities, colleges, Government and other bodies to promote UK education abroad.[18] The PMI has now commenced a second phase, to run from 2006-2011. The second stage of the PMI will have a wider international agenda and will aim to:

- position the UK as a leader in international education;
- increase the number of international students in the UK;
- ensure international students have a high quality experience in the UK;
- build strategic partnerships and alliances; and
- maintain the UK's position in major education markets, while achieving growth in student numbers from a wider range of countries.

The further and higher education sectors and the English Language sector have come together with the government and the British Council to provide a total of nearly £7million in 2006-07 directly to promote the objectives of the second phase of the PMI.

The Education UK Brand

As seen above, the PMI has embraced the development and promotion of a strong brand for Britain – the Education UK brand - established in 1999 and re-launched in May this year in response to the changing international education environment.

"The first PMI taught us that students choose country first and then look to select an educational institution. The need for a strong national brand which is distinctive and differentiates the UK from other countries is therefore very important. Following 18 months of research and development, the Education UK brand has been redeveloped and a new visual identity and messaging framework is in place. This brand provides us with a flexible and dynamic communications platform for UK education.

Within the first PMI, the Education UK brand was primarily a student recruitment tool. In the second phase of this initiative the brand will be extended to provide a common platform for the wider international education activities in which the UK is engaged."[19]

The British Council (BC) manages the brand on behalf of the UK Government, and reports that the Education UK Brand[20]:

- distinguishes the UK education offer from those of the UK's competitors;
- represents a recognizable personality for UK education through its visual appearance and the messages it communicates, thereby working to build strong emotional connections with students, institutions and partners;
- has generated increased demand for UK education by reinforcing and developing perceptions – and challenging negative perceptions;

[18] Op.cit. British Council Website:
[19] Op. cit. British Council website
[20] Ibid

- is used by the BC in over 85 countries, whilst 370 universities colleges and schools in the UK have the required license to use the Education UK logo in their marketing and communications materials;
- has been developed using insights from the brand's managers internationally, and through consultation with its target audiences; and
- generically supports the marketing activity of UK institutions, and can add value to their own branding initiatives.

Education UK brand workshops are conducted world-wide to help people understand and reconnect to the revised Education UK brand and to ensure it is applied accurately and strategically around the world.

Supporting UK Positioning to International Students

Funding, Partnerships/Scholarships

The UK Chancellor of the Exchequer's pre-budget report in December 2005 provided for a 50% rise in government support and funding for the marketing and promotion of British higher education to students outside the European Union. [21]

Total funding for the global promotion of UK education over the next two years (2006-7 and 2007-8) will be over £27 million of which £3 million is earmarked for UK/Africa partnership initiatives, £2 million for UK/Russia partnerships and £4 million for UK/China scholarships and other partnerships (supporting, for example, academic exchanges and collaboration between centres of excellence in science and technology), as well as £7.5 million for the UK/India Education and Research Initiative.

Easing of Immigration and Work Restrictions

The UK has paid attention to enhancing work rights for international students and the relaxation of visa restrictions as a means of increasing international student numbers.[22]

International students completing postgraduate degrees will be allowed to work in the UK for up to 12 months after the completion of their studies. The same employment opportunities will be available to foreign undergraduates in shortage sectors such as science and technology, benefiting nearly 50,000 students. Furthermore, the British Government has announced that it will improve the efficiency of the visa issuing process.

[21] Op. cit. "Australia's Competitors in International Education" March 2006 Update and July 2005 Update
[22] Ibid

Australia

Australia has experienced significant growth in international student numbers in recent years. The number of international students in Australia grew by 21% over the period 2002-2005, with a total of 344,815 international student enrolments in 2005 across all sectors. International Education is now estimated to be worth in excess of $AUD 7 billion to the Australian economy and is among the nation's largest export sectors.

Australian Brand Positioning

Australia has also worked proactively to attractively position itself in the international education arena, through aggressive marketing activities.

Concerted efforts have been made to promote Australian educational services throughout the world, with such initiatives as the government-run Australian Education International (AEI), an organization that focuses on the global promotion of Australian education, science and training capabilities [23] and which manages the multilingual Study in Australia website.

International AEI Research in 2002 led to the development of brand positioning for Australia which reflected students' needs, as identified in the research – primarily; *freedom, challenge and status* in undertaking international education. The key message that underpinned that branding work positioned study in Australia as, *"an education experience that makes a real difference".* Other slogans within that branding work, designed to build Australia's position as a leading provider of education and training and to distinguish the Australian offer from that of its competitors included, *"explore the possibilities"; "challenge yourself"* and, *"your future, your world".* The visual interpretation of the brand lead to the creation of the current Study in Australia (moving kangaroo) logo.

STUDY IN AUSTRALIA

However, it can be said that this branding work has not progressed to the development of a formal national education brand as clearly defined as the UK; with some suggestion that Australian institutions have not embraced the use of the brand internationally.[24]

Nevertheless, a myriad of attributes have been promoted world-wide to international students for Australian education, including excellence and innovation; quality; value; English; qualifications recognition; and support. Australian education has competitive advantages in lifestyle and interactive learning experiences, as well as a reputation for high-quality education, affordable tuition and cost of living and a safe, friendly, multicultural

[23] The Conference Board of Canada "Opportunity Begins at Home – Enhancing Canadian Commercial Services Exports" April 2006.
[24] Muche, F., "Branding and Marketing Activities: Different ways to Attract the Brightest or the Best" Academic Co-operation Association, Brussels, 2005

environment. These attributes have strengthened Australia's educational export industry.[25]

In recent years the Australian Federal Government has invested heavily in the promotion of Australia as an attractive destination for international students.

In 2003, in recognition of the importance of the international education sector to the nation, the Australian Government announced a package of funding to the sector worth $AUD 113 million over four years.[26] This funding supports enhanced promotion and an expanded presence abroad; the development of an offshore quality assurance framework; scholarship programs for overseas students and for Australian language teachers, for fellowships overseas; the establishment of international centres of excellence and a national language centre; the strengthening of onshore compliance and quality assurance; as well as revisions/ resources to support student visa processing.

Furthermore, many Australian universities have been active in promoting themselves in the international education arena. It can be argued that the original impetus for this was, ironically, largely due to a need to find additional revenue sources in response to a reduction in Federal Government funding to those institutions and international student fees was one effective way to address this shortfall.

The United States

The US has consistently been the leading destination country for international students. This has perhaps contributed to its limited attention in the past to national branding; with its world-leading, premier institutions leading the way in creating a perception of the nation as the pre-eminent higher education provider.

But in recent years there appears to have been a slowing in its rate of growth in international student numbers, likely to be in part as a result of terrorism concerns and new visa security/approval procedures following September 11, increasing tuition fees, and increased competition from other countries. For example:

- in 2002/3 in the US there were 586,323 international students studying in the United States, however the percentage increase of international students from 2001-2002 was only 0.6%[27];
- in 2003/4 there was a 2.4% decline in the number of international enrolments from 2002/2003 – with a 5% decline in undergraduate enrolments and a 2.4% increase in postgraduate enrolments – a trend observed since 2000;
- in 2004/5 565,039 international students enrolled at US colleges and universities, a drop of 1.3% from 2003/4. However the number of students enrolling in US graduate schools rose one per cent in 2005. While the increase is small it follows several years of decline in

[25] Op. cit. "Opportunity Begins at Home – Enhancing Canadian Commercial Services Exports."
[26] From The National Report on International Students in Canada (CBIE).
[27] Ibid

enrolments, signalling a possible turnaround in the downward trend since September 11[28].

US Brand Positioning

The US does not have a generic brand positioning; although it is recognized as the, *"brand leader for university qualifications in major markets."*[29]

However in response to the above performance results, the US has recently paid more attention to its positioning in the international education marketplace. In particular, it endeavoured to make American higher education appear more open and accessible to international students, particularly in the period following September 11, when stringent student immigration restrictions were enforced as a national security measure and perceptions arose that the US was no longer a welcoming destination for international students.

Nonetheless, its profile worldwide and resultant international education market share remains considerable. To support this sector the US has established an Education USA website for international students, currently provides support for a network of 450 Education USA offices around the globe which actively promote United States higher education internationally and offers extensive scholarships for international students (e.g. Fulbright).

The US amended legislation in 2005 in order to position itself more attractively to international students, and to help regain lost ground in attracting the world's best and brightest students[30]. These amendments require better cooperation among relevant federal government departments in facilitating international student recruitment, streamlined procedures for international student academic exchanges, the development of international marketing campaigns similar to those initiated by competitor nations (UK, Australia), and the creation of innovative web-based resources and more efficient processing of student visas.

As a result, the US is implementing targeted marketing strategies such as university fairs and in-country recruitment. Education USA website information is being updated to be more welcoming and informative. Admissions processes are being expedited and overseas missions are being encouraged to promote the value of US education.

At a federal level the US also hosted a University Presidents' Summit with approx. 70 college and university presidents participating, in January this year. The Summit addressed how to attract foreign students and to achieve an enhanced focus on international education. Following this Summit the Bush Administration announced a package of measures aimed at enticing more foreign students to attend American institutions and at sending more Americans

[28] Op. cit. "Australia's Competitors in International Education" March 2006 Update and July 2005 Update
[29] "Catching the Light: Positioning NZ Education" Brian Richards, June 2006
[30] Op. cit. "Australia's Competitors in International Education" March 2006 Update and July 2005 Update

to study abroad.[31] The measures include joint overseas trips by government and college officials to promote American higher education and recruit foreign students, new Fulbright grants for some foreign students coming to the United States, and State and Commerce Departments collaborating to promote American higher education around the world.

New Zealand

After a period of substantial growth, New Zealand experienced a major decline in international student enrolments across all sectors in 2003/04, [32] followed by an 11% decline in the number of student visas in 2004-2005. Fewer offshore visa approvals from China contributed to most of the drop in overall student numbers; while numbers also decreased from Japan and South Korea. An increase in student numbers came from the USA, UK, India, Germany and Malaysia. However, international education remains a major export for New Zealand, *"our fourth largest export industry"*[33] and contributed $NZD 2 billion in 2005[34]. Approx. 90,000 international students are currently studying there.

New Zealand Brand Positioning

Despite hosting a smaller number of international students than its competitors, the New Zealand Government is also active in attempting to position the country as a strong player in the international education sector. It has developed a national *'New Zealand Educated'* brand which is managed, developed and funded by Education New Zealand - a not-for-profit charitable trust that is governed by the New Zealand export education industry and is committed to an 'NZ Inc' approach to the export of New Zealand's education services. [35]

The *'New Zealand Educated'* brand is used in all offshore promotional and marketing collateral produced for the export education industry. All offshore events and commercial events that Education New Zealand promotes or participates in include fully branded collateral and promotion of the New Zealand Educated website www.newzealandeducated.com. This website

[31] The Chronicle of Higher Education, January 9 2006

[32] Op. cit. "Australia's Competitors in International Education" March 2006 Update and July 2005 Update

[33] International Education: the way forward; Hon Dr Michael Cullen, 17 August 2006

[34] International Education: the way forward; Hon Dr Michael Cullen, 17 August 2006

[35] Education New Zealand website

provides information about New Zealand study and course options, institutional profiles, and about living in New Zealand. New Zealand institutions are encouraged to list their profiles and course details on the website for an annual fee. New Zealand institutions and other approved groups who wish to use the industry brand for their own marketing purposes, must apply to Education New Zealand and sign a contract before gaining access to brand resources. New Zealand brand attributes listed on the website include: British-based education system; world-leading programs/degrees; recreation in paradise; warm and welcoming environment; and high quality living conditions.

In 2004 the New Zealand Government announced a four-year $NZD 40 million ($US 25 million) international education package to, *"boost the fortunes of its education export industry"*[36] and to, *"enhance its strategic approach to international education, recognising the important social and economic benefits of the sector to the economy. The focus of the funding is on: strengthening the quality of international education provision; enhancing links with target countries overseas; and promoting research, innovation and diversification."*[37] The package provided for education counsellors in Malaysia, the US and Europe; more scholarship places; and the development of satellite campuses, e-learning and off-shore courses. [38]

The New Zealand Government has also changed student visa policy to provide more opportunities to international students to gain work, and to make New Zealand a more competitive destination for international students by easing work restrictions for students and their partners.

Perhaps reflecting a questioning as to whether branding efforts to date have differentiated New Zealand appropriately, in June 2006 a series of New Zealand brand repositioning workshops were held.

In August this year at the annual Education New Zealand International Education conference, Dr Michael Cullen, Minister for Tertiary Education outlined a new direction for the sector and additional promotional spending. He outlined his approach as four goals that will form the basis of the new agenda for international education: [39]

- New Zealand students will be equipped to thrive in an inter-connected world;
- New Zealand education providers will be strengthened academically and financially through international links;
- international students will be enriched by their education and living experiences in New Zealand; and
- the direct economic and social benefits to New Zealand form international education activities must grow to their full potential.

[36] Education Canada Branding 2006 Action Plan – "Building the Education Canada Brand Across Key Export Sectors" CAPLS AGM, November 2005
[37] The National Report on International Students in Canada (CBIE).
[38] Op. cit. "Australia's Competitors in International Education" March 2006 Update and July 2005 Update
[39] International Education: the way forward; Hon Dr Michael Cullen, 17 August 2006

As part of this announcement he outlined an additional $NZD 1 million in Export Education levy funds in 2006 and 2007 towards supporting additional promotion and marketing activities. He also committed the government to:

- undertake ministerial missions in 2006/07 to North Asia (including China) and Northern Europe and in 2007/08 to South East Asia and the Middle East;
- improve the effectiveness of quality assurance and pastoral care policies; and
- implement an effective international media and communications strategy and investigate other promotional and marketing ideas.

FRANCE

France Brand Positioning

In November 1998 Agence EduFrance was created by interministerial decree. Working in collaboration with the French Ministries for Education, Foreign Affairs, Research, Culture and Industry, EduFrance lists its three primary goals as:

- telling the world about the breadth and depth of French higher education and scientific expertise. EduFrance has a global communications and marketing strategy, implemented through a network of local offices and through a web of partnerships;
- offering international students and scholars a full range of essential support services to allow them to make the most – academically and personally – of their stay in France;
- supplying educational consulting services.[40]

In its aim to raise the international profile of French education, EduFrance relies on a network of local offices (located across five continents) and global partnerships, including French diplomatic posts. Local offices provide convenience to prospective students and their families by offering information and advice. Local offices also work with local institutional partners and promote French education and EduFrance's services in local markets.

EduFrance has also developed a set of tools for use in cooperative campaigns to explain the benefits of French education to international students and scholars – and to demonstrate the benefits of internationalization to French and foreign institutions of higher education and research. These tools include:

- 'Come to France', a 9 minute video cassette of international students discussing their studies in France, accompanied by a 4 minute presentation of France;

[40] EduFrance. http://www.edufrance.com

- EduFrance presentation kits;
- a series of EduFrance student guides filled with practical information on study programs in France and associated EduFrance services.

EduFrance is also involved with its partners through:

- EduFrance forums, international events in which EduFrance brings representatives of French institutions together with international students;
- major meetings in the world of international education (including World Education Market and NAFSA);
- conferences and roundtables on higher education and research in France;
- tours in France and abroad;
- EduFrance promotional publications including multilingual brochures, CD-ROMs, videos and posters;
- EduFrance coordinates a network of expert consultants in education, engineering, science, technology, and other fields;
- the coordinating contacts between its partners and its 175 member institutions with whom it maintains close and continuous contact.

EduFrance has contributed to the increasing number of international students who have chosen to study higher education in France in recent years.

5. Current Canadian Education Positioning in the Marketplace

Canada's international education industry has an estimated $CAD 4 billion economic impact;[41] and Canada has enjoyed growth in international student numbers over the past decade.

Canadian educators are reported to have, with varying degrees of understanding and commitment, realised that education presents an important economic opportunity. As the number of Canadian students at the elementary, secondary and university levels is expected to decline sharply in several provinces over the next few years, universities and school boards are realising the economic importance of recruiting more international students. [42] However one commentator suggested that *"...despite the growth of Canada's education exports, it is clear that Canada is not keeping pace with the potential growth of the market for the provision of international educational services."*[43]

The positioning of Canadian education internationally is partly undertaken through the Canadian Education Centre Network (CECN) - a private, independent, non-profit company, originally founded in 1995 using government of Canada funding, which ended in spring 2005. CECN promotes and markets Canada as a study destination for international students through offices globally. Canada's brand attributes promoted within the Study Canada website managed by CECN include:

- one of the best places in the world to live;
- high standard of living;
- welcoming environment;
- beautiful environment;
- a safe place to study;
- a high tech country;
- and a bilingual nation.

Provinces and institutions also undertake their own marketing activities. Most Canadian embassies and consulates abroad also do promotional activities in their countries of responsibility, particularly in markets where there is no CECN office. However, there is a lack of regional cooperation and strategic coordination. The recent creation of the "Edu-Canada" unit at Foreign Affairs and International Trade Canada is an important step forward in the coordination of international education promotion.

Nonetheless, despite the significant value of the international education sector to Canada, research indicates that the country has not developed a cohesive national education brand positioning -

"A recent study commissioned by the Australian Government found that Canada's positioning as a desirable destination for international education and

[41] Asia Pacific foundation of Canada, Canada Asia Commentary Number 40 - Canada Missing Opportunity in the Booming China Education Market, Carin Holroyd, January, 2006
[42] Asia Pacific foundation of Canada, Canada Asia Commentary Number 40 - Canada Missing Opportunity in the Booming China Education Market, Carin Holroyd, January, 2006
[43] From The Conference Board of Canada "Opportunity Begins at Home – Enhancing Canadian Commercial Services Exports" April 2006.

training is less clear than the UK, USA or Australia and that the most distinctive feature about an education in Canada is that it is not distinctive at all!"[44]

"While there are examples of increased coordination and collaboration, (Canada) has yet to significantly unify its efforts, particularly in terms of marketing Canada as a destination to study....as well as a lack of consistent and deliberate messaging abroad."[45]

"Canada's lacklustre performance compared to NZ, Australia the UK and the US cost the country billions of dollars in lost economic activity."

"We lack national coordination and support that other countries enjoy"[46]

The impact of the absence of a strong national brand could be a contributing factor towards the fact that Canada is not top-of mind for prospective students, as is perhaps reflected in the results from a recent (2004) Canadian Bureau for International Education (CBIE) Survey of International Students, called "Canada First". This Survey comprised 1,700 international students at colleges and universities across Canada, and showed that only 60% of participants saw Canada as their first choice country; and that rising tuition costs were a major issue for these students – of concern given the importance of perceived value in students' study decision criteria, as seen earlier in this Report. More encouraging were the students' ranking of Canada's education quality as the top reason for choosing to study there, closely followed by safety, and the fact that more than 90% of participants were satisfied with their Canadian study experience and that 83% would recommend it to friends.

One writer delved into the impact of the lack of a Canadian brand identity in a specific international education marketplace - China[47]. They said that, *"despite strong historical ties between China and Canada and the presence of a large Chinese-Canadian community, Canada has not been able to match the strong appeal of American education, particularly at the university level. In comparison to its main competitors, notably Australia, New Zealand and the United Kingdom, Canada lacks a coordinated national marketing effort, and has not made a sustained commitment to recruit overseas students. There is, in sharp contrast to the other nations, no Canadian brand identity in the Chinese market. While the Government of Canada is constrained by its lack of constitutional authority in the delivery of educational services at home, it has been generally absent from the promotion of Canadian education overseas. Yet at the institutional level Canadian school districts, colleges, universities and private institutions have taken independent and creative steps to enhance their presence in the Chinese market. These range from aggressive recruiting campaigns to the establishment of campuses in China. However, a sharp rise in the number of Chinese university spaces in recent years, a large and growing*

[44] BC Progress Board: "The Role of International Education: Expanding Student opportunity and Economic Development in British Columbia"

[45] The National Report on International Students in Canada 2002

[46] Education Canada Branding 2006 Action Plan – "Building the Education Canada Brand Across Key Export Sectors" CAPLS AGM, November 2005

[47] Asia Pacific foundation of Canada, Canada Asia Commentary Number 40 - Canada Missing Opportunity in the Booming China Education Market, Carin Holroyd, January, 2006

number of foreign-owned institutions in the country, and strong international competition, is already dampening the flow of new Chinese students to Canada. Without rapid and concerted efforts in China and elsewhere, Canada will forfeit its place in this successful and lucrative service industry. It will also jeopardize Canada's future ties with Asia."

This lack of unified branding and national brand presence has been reported as being largely due to:

- The provincial jurisdiction over education and consequent reluctance by the national government to take a leadership role in developing a national education brand, as alluded to above and supported elsewhere:
  - *"The Canadian education system is characterized by jurisdictional fragmentation, which has hampered efforts to promote and facilitate trade in higher education services. Canadian education services are dealt with separately by 13 different provincial and territorial bodies, with no identifiable national political leadership. This has hindered efforts to build a 'Canadian brand' of education that could be sold to the rest of the world.*[48]*"*
  - *"Despite consistent lobbying by all of the organisations involved in international education such as CBIE, the Association of Community Colleges in Canada (sic) and the Association of Universities and Colleges of Canada), the federal government has not assumed a role in international education. Perhaps worried about the perception that international students are 'taking' places away from Canadian students seeking entry into elite professional programs, the Canadian government has shied away from major pronouncements or co-ordinated recruiting efforts. Ottawa is also sensitive to its lack of constitutional authority in the field of education."*[49]

- The fragmentation and involvement of many players in the promotion of Canadian international education makes it difficult for the sector to have a coherent and coordinated presence in the marketplace.[50] For example there is a plethora of organizations in the education sectors that are involved in the Canadian education export industry, providing support or advocacy for international education:
  - Association of Canada Community Colleges [ACCC]
  - Association of Universities and Colleges of Canada [AUCC]
  - Language Industry Association [AILIA]
  - Canadian Association of Private Language Schools [CAPLS]
  - Canada Language Council [CLC]
  - Canadian Education Centre Network [CECN]
  - Canadian Bureau for International Education [CBIE]
  - Canadian Higher Education Commission

[48] Op. cit "Opportunity Begins at Home – Enhancing Canadian Commercial Services Exports".
[49] Holroyd, C. Asia Pacific Foundation of Canada, Canada Asia Commentary Number 40 – "Canada Missing Opportunity in the Booming China Education Market", January, 2006
[50] Op. cit "The Role of International Education: Expanding Student opportunity and Economic Development in British Columbia"

- Under-funding of international education and related market research: *"Canada has consistently under-funded international education in comparison to other OECD nations. According to the AUCC, on a per capita basis Canada contributes $US 0.80 while Australia, the US and Japan contribute $US 9.07, $US 4.70 and $US 4.94 respectively. With budget cuts announced for the CECN in 2005-6, this is a disturbing trend for a growing and important sector, particularly in light of ramping up of financial support for international education by a number of countries around the globe. ...Canada has invested very little in terms of market research to identify future student mobility trends and international student choice factors as well as to examine and analyse competitor strategies on an ongoing basis."*[51]

Provincial Activity

As there is no federal coordinating agency for international education in Canada, new initiatives are typically implemented on a provincial basis.

Many provincial governments are beginning to become more involved in promoting international education; and several provinces have developed international education strategies in order to maximise their share of the international education market. For example[52]:

- In 2001 Alberta launched an "International Education Strategy.'
- In 2002 Quebec launched a multi-million dollar pilot program to promote its educational expertise internationally. This pilot program supported the development of promotional materials; the province's involvement in trade shows, education fairs and international forums; general student recruitment efforts; and delegations to and from overseas markets. The pilot project was given ongoing budget status and now receives $CAD 10 million annually from the Quebec government.
- The Government of Ontario, the province with the largest number of international students, recently contracted with CECN to develop an "Ontario Pavilion" for use at international education trade fairs. The initiative will develop a distinct image for Ontario at these events.
- In Nova Scotia, a co-operative industry association of education and training providers (EduNova) works with its members to raise the profile of the province's education and training programs abroad. Its focus is on collaborative international recruitment activities and the identification of international project opportunities.
- In December 2005 the British Columbia (BC) Progress Board, an independent panel of senior business and academic leaders in BC, released a report on the role of international education in that province. It said that although $CAD 2 billion is generated annually from international education in BC, the province is not well placed to respond to the increasingly competitive education marketplace. The

[51] The National Report on International Students in Canada, CBIE 2002

[52] Op. cit "The Role of International Education: Expanding Student opportunity and Economic Development in British Columbia"

report details several proposals for enhancing the province's international education sector. [53]

While provincial involvement in promoting international education is a welcome development, it does not supplant the need for support of Canadian education at a Federal level. [54] It can also create some confusion offshore – for instance, when provincial initiatives or trials result in different service levels to prospective students.

[53] Op. cit "Canada Missing Opportunity in the Booming China Education Market"
[54] Ibid

Implications from this information

Research outlined earlier in this Report shows the importance of destination in an international student's decision about where to study. Most students choose their destination (country) first. In light of this, the successful positioning of Canada as an attractive study destination is critical. This is particularly the case in view of the increasingly aggressive competition and marketing from emerging and established suppliers – especially Canada's English-language speaking competitors, as discussed above.

Therefore, the over-riding outcome from information presented above is the need to develop and manage a strong, attractive national education brand for Canada. This proposition is supported in the literature;

"We need a more appealing brand to attract students – (one that is) strong and exciting"

"Canada needs strong branding to increase its share of the global international student marketplace..."[55]

"A Canadian brand of education that can be sold to the rest of the world is required."[56]

Other implications from the information detailed in the Report are that such brand development and management would require:

- Endorsement, collaboration, agreement and co-operation between the national and provincial governments, and between government and industry associations. This Report found positive results from collaboration across the industry in the Prime Minister's Initiative (PMI) in the UK; and the US government is now mandating collaboration in regard to international education initiatives among relevant government departments within the US.

- A strong leadership role by the Canadian government – as seen in the competitor analysis, in the UK, Australia, New Zealand and latterly the United States, the federal government has realised the need for – and economic and social benefits from - actively leading the way in positioning their countries strongly in the international education arena.

- The appointment or establishment of a single national entity with responsibility for coordinating brand development and ongoing brand management, to avoid fragmentation of efforts; and with adequate funding. For example it was seen that the British Council manages the "Education UK" Brand, and Education New Zealand manages the "New Zealand Educated" Brand.

[55] Op. cit "Building the Education Canada Brand Across Key Export Sectors"
[56] Op. cit. "Opportunity Begins at Home – Enhancing Canadian Commercial Services Exports"

- Central funding for national branding initiatives, including associated market research as identified in the report into student choice factors, competitor strategies, future student mobility trends etc.

- Consistent national messaging, to avoid any confusion in prospective students' minds offshore about the Canadian offer.

- Comprehensive target profiling to understand various segments' particular needs and wants. At present there appears to be little information on Canadian target segments.

- Improvements in data collection to ensure strategies are based on realistic, accurate and up-to-date market assessments.

- Support for international partnerships, exchanges and scholarships, and internationally-relevant research – which have increased in recent years in many competitor destinations:
  - to enhance the appeal and accessibility of Canada as a study destination;
  - to augment Canada's positioning and status within the international education arena.

Recommended Branding Components

Recommended Canadian branding components include:

- a focus on the perceived high quality of Canadian education – as reported above, a CBIE Survey showed that quality is the leading draw card for students to the country;

- actively marketing Canada *as "a first-choice destination for advanced education"* – to raise the percentage of students who nominate it as their preferred place of study;

- management of perceptions about Canada as a study destination offering value for money – an important factor for prospective students, especially given concerns highlighted in the CBIE Survey about Canadian tuition fees;

- leveraging Canada's perceived strengths in one of its strongest, most visible international student sectors - the English Language segment – identified by CAPLS as its:
  - multicultural nature – open to diversity;
  - perception as being a safe country;
  - high value on premium education;
  - perception as having a neutral accent – easy to understand and learn.[57]

- leveraging off the respected Canadian Brand – *"Canada's national brand*

[57] Op. cit "Building the Education Canada Brand Across Key Export Sectors"

image is particularly strong ....in August 2005 the Anholt-GMI Nation Brands Index placed Canada just behind Australia in terms of international brand power. The study noted that Canada is viewed as being a better place to live, work and invest than the UK or the US."[58]

The Report has also noted the need for the brand to be refreshed at appropriate intervals – to retain relevance within the changing international education arena. Such brand re-assessments have been undertaken by the UK and New Zealand.

A further implication arising from the findings in earlier sections of the Report is the need to consider the inextricable link between immigration matters (related to issuing of student visas and foreign student work opportunities, for example to cover living and tuition costs) and international student enrolments. To shore up their efforts to position themselves attractively to international students, there has been some lessening of immigration restrictions and of restrictions on international student work allowances in each of the UK, US, Australia, and NZ in recent years – and Canada has lately followed with somewhat improved conditions and eligibility requirements for certain students who want to work in Canada.

To support its branding initiatives, Canada should ensure accessibility by legitimate targeted foreign students to the Canadian market, and consistency of immigration policies for students in all provinces;
"As part of the overall branding of its educational services, Canada should address how to make it easier for legitimate students to enter and become fully engaged in (its) education system."[59]

[58] Op. cit. "The Role of International Education: Expanding Student Opportunity and Economic Development in British Columbia"
[59] Op. cit "Opportunity Begins at Home – Enhancing Canadian Commercial Services Exports" April 2006.

Next Steps

Next steps will include:

- identification of what information is still needed – what additional primary research is needed;
- endorsement by key stakeholders of development of Education Canada brand;
- establishment of a working group to progress the initiative;
- development of, and agreement to timetable for brand development and implementation;

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ADDENDUM

A. NEMR Roundtable Discussions Write Up

Attendees

Johanne Boucher
Nathalie Dubois
Nejat Gorica
Robyn Inman
Stephanie Dion
Georgina Galloway
Jennifer Humphries
Gerry La Belle
Phillip Landon
Calum MacKechnie
Diane Mills
Michael Polan
Mary Jo Lynch
Claude Martel
Chris Musial
Valerie Richmond
James R. Rossiter
Gary Stairs
Gardiner Wilson
Dr. Smita Sengupta
Tom Tunney

Yves E. Beaudin
Susan Birley
Ava Czapalay
Louise-Esther Fortin
Jennifer Keller
John Manning
Julia Danos
Bo Hansen
Denise Lecavalier
Brenda McCavour
Waldemar Riemer
Darcy Rollins
George Molloy
Dan Rizzoli
Harley Trudeau
Elaine Armstrong
Suzanne Bubic
Julia Drew-Watt
Dominic Gosselin
Morris Krymalowski
Sonal Pathak

Drew Fagan
Chris Greenshields
Christine Mckay
Marie-Francoise Potvin
Renetta Siemens
Helen Smiley
Ian Williams
Valerie Sirois
Jean-Philippe Tachdjian

JWT Education:
Allison Doorbar
Sheryl Prince

SUB-GROUP EXERCISE:

What is your vision of the Canada Education and Training Industry Brand?

1. Define the Target Audience
   - *Primary Target Groups*
   - *Secondary Target Groups*

2. What do you want the target audience to say, think and feel about Canada as an education destination in 3 – 5 years?

3. What do you think could be some of the core differentiating attributes and/or personality traits that could distinguish the Canada Education Brand from other destination education brands?

Group A – Participants who remained in the room

Group B – Participants who gathered outside of the room

Notes

- Group A struggled to address the assignment given relatively high levels of negativity regarding the approach to developing a Canada Education brand, the timing of the exercise and the nature of the exercise itself.
- After initial discussions about how to approach the assignment, Group B felt it would be most helpful if there were clearly defined objectives for developing a Canada Education Brand to then enable the most relevant definition of target audience segments

SUB-GROUP FEEDBACK

1. Define the Target Audience

Group A - Primary Target Audiences in Priority Categories

Primary - Category 1	Primary - Category 2
Undergraduates	Apprenticeships
Post-graduates (Masters, PhD, Post-Docs)	Internships
Vocational/College	Working Holiday
ESL	Corporate Training
FSL	
K – 12	

Group A – Secondary Target Audiences

Agents
Parents
Counselors
Institutions
Governments
IFI's
Employers
Media
Alumni
Faculty
Industry/Associations/CEOs
Professional Networks

2. **What do you want the target audience to say, think and feel about Canada as an education destination in 3 – 5 years?**

Group A

Quality	Innovation	Comfortable
Quality of life	Cutting edge	User friendly
Value (for money)	Modern	Enjoyment
Worthy investment	Freshness	Place to call home
Employment opportunity	Go to the limit	Best place to find a friend
Pathway to…	Multicultural	Stable
Immigration possibility	Acceptance	Huge country
Globally connected	Individuality	"Keep exploring"
Employment opportunity	Openness	I want to be there
Recognition	Welcoming	Safety

Group B (did not address this question)

3. What do you think could be some of the core differentiating attributes and/or personality traits that could distinguish the Canada Education Brand from other destination education brands?

	Group A	Group B
Quality	X	X
Innovation	X	X
Multicultural/diversity	X	X
Bi-lingual (two international languages); French second language	X	X
Recognition of the individual (Charter of rights); accepting; open mindedness	X	X
(Land of) Opportunity; we have it all; land of 1000 degrees; vastness	X	X
Excellence; quality of student experience (programming, teaching)	X	X
International profile; "The world in one country"	X	X
Explore the frontier; explore yourself	X	
Where the world feels at home; comfortable	X	
Physical geography diversity	X	
Cost (value for money)		X
Portability of qualifications		X
Fun		X
Safe		X
Choice/Options		X
Growing/Young		X
North America (proximity)		X
Political neutrality		X
Climate		X
Exotic		X
Freedom		X

B. Key Stakeholders' Perspectives

Two sequential research efforts were conducted to gain insights from key Canadian stakeholders regarding the development of a Canada Education Brand.

The first initiative, a research questionnaire, was implemented in October 2006 and provided feedback from twenty-one participants. The second initiative, consisting of six one-on-one interviews, was conducted in February 2007 as a means of supplementing the discussions facilitated at NEMR in October which were hindered by last minute schedule changes resulting in significant loss of time for the discussion sessions.

The initiatives were designed to accomplish the following:

- gain initial insights regarding perceived obstacles to determining and implementing a unified Canada Education Brand, perceptions of the brand's current strengths and weaknesses and desired advertising themes; and
- provide actionable direction for the design and development of further exploratory research among a larger sample of Canadian officials as well as other primary target audience groups.

Details for each research effort among this critical target group are provided below.

<u>Research Questionnaire</u>

Twenty one key stakeholders were solicited to participate anonymously in a research questionnaire. The group consisted of representatives from the following sectors and categories:

- Canadian thinkers on internationalization
- Recruiters
    - Post-secondary education
    - Language Training Industry
- Canadian representatives abroad
- Training Industry
- E-Learning Industry
- Provincial government officials
- Federal government officials

The questionnaire consisted of five closed-ended questions and seven open-ended questions and included both an English and French version. Three out of the four French speaking recruits completed the questionnaire and all of the 17 English speaking recruits participated. While all respondents did not provide feedback to each and every of the 13 questions in the questionnaire, the vast majority were comprehensive in their responses.

The results of the questionnaire are provided below.

1. What type of organization do you currently work for? (Closed ended)

Description	# of Respondents	Percentage of Total
Private educational Institution	6	30%
Public educational Institution	5	25%
Federal government	3	15%
Other [Canadian private not-for-profit organization; private business; Federation des cegeps]	3	15%
Non-governmental organization	2	10%
Provincial government	1	5%

2. Which target audience groups do you typically work with/address in your current position (check all that apply)?

Target Audience Group	# of Respondents	Percentage of Total
English as a Second Language Students [ESL]	13	65%
Agents	12	60%
Undergraduate Students	11	55%
Graduates/Postgraduate Students	11	55%
Study Abroad Advisors	11	55%
Parents of Students	10	50%
Faculty Members	8	40%
High School Students [Overseas Schools]	6	30%
Career Advisors	6	30%
Alumni	5	25%
Employers	5	25%
Adult Learners	5	25%
French as a Second Language Students [FSL]	4	20%
Students at Community College/CEGEP	3	15%
Teachers [Final Two Years of High School]	1	5%

3. How long have you been working in the educational sector? (Closed ended)

Tenure	# of Respondents	Percentage of Total
7+ years	19	95%
4 – 7 years	1	5%
1 – 3 months	0	0%
6 – 12 months	0	0%
0 – 6 months	0	0%

4. What are the top three words or phrases that come to mind when you think of the Canada Education Brand – please identify whether the word(s) chosen are positive, negative or neutral. (Open ended)

Top of Mind Words or Phrases	# of Positive Mentions	# of Negative Mentions	# of Neutral Mentions
Excellent quality of education	8		
Diverse (general)	6		
Good value; high quality and cost effective)	3		
Safe, secure, clean environment (towns/cities)	3		
Wide range of educational choices	2		
Globally recognized education qualifications	2		
Spectacular scenery; naturally beautiful	2		
Nice/nice country	2		
Home away from home	1		
Wide range of choices (general)	1		
High standard of living	1		
Land of opportunities	1		
World class	1		
Transformative	1		
United	1		
Credible	1		
Recognized as being trustworthy internationally	1		
Open and safe	1		
Equal opportunity	1		
North America	1		
High standard of teaching	1		
Private and public university same quality	1		
Affordable tuition fees in Quebec	1		
Not cohesive; disjointed; fragmented		3	
Unknown/neutral		2	
Not clear		1	
Undersold (there is no brand)		1	
Immigration/Visas		1	
Competitive prices			1
Size of territory	?	?	?

5. What do you believe are the strengths of the Canada Education Brand? (Open ended)

Strengths	# of Mentions
Quality programs/education; quality education in public and private systems	8
We don't have a Canada Education Brand; not developed enough yet to have strengths; not sure what the current brand is; I have not seen a Canada Education Brand logo, promo or marketing plan	4
Variety/broad range of programs available	2
Good value	2
Relatively inexpensive compared to main competitors (Australia, UK and USA); low cost	2
Multicultural environment/diversity	2
Beautiful scenery; gorgeous nature	2
Safe and clean towns and cities	2
Consistency	2
People believe in the Canada product; credibility	2
Friendly country to send students to	1
Modern facilities	1
Affordable (tuition and cost of living); relatively low tuition fees (compared to GB and EU countries) because of publicly funded system	2
Unsullied by reputational issues of mercantilism such as in Australia	1
Top living standards	1
Professional	1
United	1
National	1
Healthy environment for students	1
Highly sought after destination	1
Excellence in education	1
Globally recognized education	1
Due to historic ties, Indians find it as home away from home	1
Canadian education being primarily public education which is very reassuring on ground	1
Link between academic and industry component of the program which has attracted students as well as the Indian government to study the Canadian (North American) model of community colleges to emulate in India	1
Open to visitors and tolerant of differences	1
Has a lot of potential	1
Creativity in technology and the arts	1
Expertise in academia	1
ESL language training	1
Qualified, certified teachers	1
Accessibility (as compared to many countries where on the final national exam results in high school determine whether a students	

moves on to post-secondary education)	1
Opportunity to study in bilingual environments(Quebec, New Brunswick)	1
Importance given to living environment in schools (many student services)	1
Research fields related to strong industries (biotechnology, agri-food, pharmaceuticals, petroleum, aerospace, etc)	1

6. What do you believe are the weaknesses of the Canada Education Brand? (Open ended)

Weaknesses	# of Mentions
While Canada as a country is widely known, Canada Education Brand is not widely known among international students; not much is known about the brand; no brand recognition; not well known; I am not sure that I can identify the qualities of the CEB at all, actually; Our education system is not well known. We need to promote our high standards, excellence and ingenuity.	6
Provincial leadership of education has created an inability for Canadian education to be marketed as one brand; unable to market in a common way. Lack of coordinated and consistent branding. Lack of federal role in international education through an organization due to education being a provincial responsibility. It presents a very fragmented picture on the ground when promoting Canadian education internationally. Further fragmentation occurs when types of institutions express discomfort in being represented together, for example, Universities don't want to be in the same event as community colleges when such events are aimed at branding Canada as an attractive educational destination. Sometimes institutions find comfort in attaching themselves with American branding events which dilutes the whole Canada Brand effort. Regional inconsistencies. Everyone is doing something on their own, as opposed to working cohesively together for the whole of the country. There is a real need to create a brand that brings everyone together under one umbrella.	7
No formal branding of Canadian education – we do not have an image that we can market; we don't have a brand; lack of exposure	5
International students perceive Canada as a very difficult place to get to from an immigration perspective. We continually get beaten in markets by the UK and Australia due to our slow and restrictive student visa process.	3
Students have poor understanding of the relative merits of one university over another; we are perceived as being rather similar and difficult to differentiate.	1
No accreditation or quality control	1
New country, therefore little culture	1
Bickering	1
Weak elitist culture (eg compared to the US). Foreigners regularly look for standing and reputation. In Canada rankings are not	

official and little regarded. In some cases this can put us at a disadvantage.	1
Distance of certain small cities as opposed to major centres; the impression that some areas are "isolated"	1
Diverse interests	1
French Vs. English	1
Vision	1
It is very difficult for outsiders to understand our federated model system. Meaning that there are different requirements for different provinces, different quality assurance systems, etc.	1
Nothing dramatic to make it stand apart and give it the point of difference or "edge" compared to UK, US, Australia, etc.	1
Cold climate	1
Lack of financial resources	1
Level of funding for research	1
Under funding of universities	1

7. Which education destinations do you believe are Canada's top five competitors? (Closed ended)

Competitor Destinations	# of Respondents	Percentage of Total
USA	20	100%
UK	20	100%
Australia	19	95%
New Zealand	13	65%
France	8	40%
Germany	5	25%
Ireland (write in)	3	15%
Singapore	1	5%
Spain (write in)	1	5%
Switzerland	0	0%
Don't know	0	0%

8. What do you believe are the ownable and sustainable advantages the Canada Education Brand has over its key competitors? (Check all that apply)

Advantages	# of Mentions	Percentage of Total
Safe country	20	100%
Quality of overall education experience	18	90%
Value for money	17	85%
Wide variety of programs and courses	14	70%
Quality of academics	14	70%
Expertise in particular fields	13	65%
Possibility of immigrating after graduation	13	65%
Offers various lifestyles/adventures	11	55%
Accommodation is affordable	11	55%
Good study environment	10	50%
Good career prospects in home country after graduation	9	45%
Can work while studying	8	40%
Low cost tuition	8	40%
Fun place to study	6	30%
Can obtain work permit to work in Canada for up to two years after graduation	6	30%
Leading worldwide study destination	6	30%
Accommodation is easy to find	5	25%
Easy to get a study visa	4	20%
Good weather	4	20%
Other (Write ins: Opportunity to work while studying through co-op; investment by government in university research; research institutions/technology)	3	15%
Low entry requirements	3	15%
High entry requirements	1	5%
Don't know	0	0%

9. What do you believe are the top three obstacles to the successful identification, development and implementation of a desired Canada Education Brand? (Open ended)

Obstacles	# of Mentions
Lack of strong federal/provincial coordination; fragmented efforts over a coordinated team effort; coordination of national marketing efforts; lack of unity among provinces; national unity; federal and provincial jurisdiction issues/buy in	10
No funds/resources available to market	5
Autonomy of institutions; lack of unity among educational institutions; lack of cooperation between universities; lack of unity with Canadian institutions	4
Need all types of institutions to take part; diversity of institution type; incorporating all types of education	3
Lack of government support; government backing; lack of government investment in international ed	3
Visa processing barriers; immigration - student visas; lack of consistency in immigration policies	3
Students in private schools can't work; inability for students to work while studying; no work permits for students at private language schools	3
Lack of one single body like British Council; no one to take the lead in branding Canada; no legally recognized advocate	3
Federated model; education being a provincial responsibility	3
Fragmented stakeholder group; too many educational associations - fragmented	2
Lack of parity for private and publics; public versus privates	2
Promoting all provinces equally	1
Canadian universities are not well known	1
Need "excitement" in marketing not "niceness"	1
A unified authoritative presentation	1
Weather	1
Not the "hands on" approach that US students expect	1
Lack of awareness of magnitude of industry	1
Lack of knowledge of the potential	1
Little participation by Quebec in Canadian activities	1

10. What visual elements do you think a Canada Education Brand should include (eg Maple Leaf, beaver, polar bear)? (Open ended)

Visual Element	# of Mentions
Maple leaf	18
Visual elements depicting the multicultural society (people from different parts of the world); diversity	4
Cities; urban sophistication	4
High tech; technology; modernity/development/the future	4
CN Tower; popular skyscrapers	3
Outdoor adventure activity; skiing, students in fun activities – beaches, white-water rafting, snowboarding, natural beauty	3
Parks (greenery); nature/environment	3
Institutions; ivy draped buildings	2
Well-known scenic shots (need to be tailored to different markets, eg in Asia more emphasis on urban and in Europe more on the spectacular scenic shots)	2
Niagra Falls	1
Contemporary	1
Totem poles	1
Something modern and universal	1
Diverse landscapes	1
Rockies	1
Dynamic, social	1
Professional	1
Summer activities	1
Showing entertainment	1
Students in non-typical classrooms (class outside in park setting)	1
Map	1
A communication firm may need to be hired to develop a brand (eg logo and slogan) that Canada can use abroad to represent our education system.	1

11. What visual elements do you think a Canada Education Brand should NOT include? (Open ended)

Visual	# of Mentions
Nature shots without people; snow scenery; beauty shots of lakes; winter shots	9
Beaver	9
Polar bear	7
Igloos	3
RCMP	2
Mounties	2
Grizzly bears	2
No animals	1
Mortar boards	1
Cartoon characters	1
Anne of Green Gables	1
Eskimos/Inuit	2
Nature shots – should be included but not as the focus of the visual image	1
Native dancers	1

12. Do you support the development of a desired Canada Education Brand?

	# of Nominations	Percentage of Total
Yes	16	80%
No	1	5%
Maybe (please explain)	3 (Yes with required $, research and consultation; if the provinces agree to be represented; as long as it emphasizes the diversity of the situation)	15%

13. Please include any additional comments you may have on the development of a Canada Education Brand.

• Need to consider all potential partners involved in education and travel to Canada: DFAIT, CTC, Air Canada, provincial govt, CEC, AUCC, ACCC
• The two main issues that need to be dealt with in creating a brand is the establishment of a national organization that overseas the development and marketing of the brand and secondly a strong push from DFAIT to ensure that student visa obstacles are removed and fast tracking of visas is made possible. Currently we are losing to our competitors in many markets due to this problem.
• A planned coordinated marketing plan using different creative elements of branding through events, contests, advertising, sponsored trips/conferences for high school counselors/principals from countries on priority to brand Canadian education for example in India. Many countries like UK and Australia invite High school counselors/principals or deans of post secondary institutions for a familiarization tours. Publicity material like counselors handbook which would detail Canadian education and could be used as a ready reckoner.
• The educational community has been calling for the development of a Canada Education Brand for a long time. I don't think you will find too many that are not interested in supporting this. But please ensure that we do this right by adequately supporting the development of the Brand ($, research and consultation). There is breadth of experience that exists within the educational community and it would be important to tap into this.
• Canadian provinces need to understand that Canada has to be branded as a country BEFORE they can brand their particular provinces. Also, institutions should be careful not to be branded as part of the USA
• IT'S ABOUT TIME THAT CANADA HAS AN EDUCATION CANADA BRAND!!!
• Don't use CECN
• We are far behind our competitors. Let's get going.
• IT'S ABOUT TIME. WE ARE WAY BEHIND OUR COMPETITORS AND HAVE KNOWN IT FOR A LONG TIME. I'M AFRAID OUR FOOTDRAGGING WILL CONTINUE AS WE HAVE BEEN DOWN THIS ROUTE BEFORE.
• At the postsecondary level, Canada will always have a challenge that the Australian and UK universities do not have. They are self-accrediting institutions and that is not the case for Canada. In terms of potential backlash, I think Canada has to be VERY careful not to appear too aggressive or commercial. We do not need to follow the steps of Australia, New Zealand and UK who are successful in numbers but whose reputation for quality is decreasing because of their commercialism.
• I believe the development of a Canada Education Brand is an excellent idea, and one that should have been done years ago. How else can we even begin to try and compete with other countries??? We have many years of playing "catch-up" ahead of us! I appreciate being involved with this survey and if there is any other way to get more involved I would be pleased to do so. I strongly believe in Canada's education system, and will continue to support and promote it.
• Canada is an incredible country but generally understated. A brand needs to be with a sales focus and not 'embarrassed' to state how incredible this country is - to really push Canada against the strong marketing of Aus, UK, US etc
• We need to compete with countries that are already well known. Make it exciting, adventurous, informed, open to others, etc
• I would be interested in being part of any advisory or follow-up committee.
• Thank you for consulting me.

Key Stakeholders' Perspectives (continued)

One-on-One Interviews

Six additional key stakeholders were solicited to participate anonymously in one-on-one telephone interviews. The lines of inquiry followed the questionnaire cited above. However, all questions were open ended allowing for participants to articulate their opinions and perceptions in their own words. While interviewers speaking both fluent English and fluent French were available to conduct the interviews, none of the interviewees requested to be interviewed in French.

Overview of Findings

The six participants were all in senior level positions in their respective organizations with titles including President, Director and Executive Director. Three out of the six were employed by public educational institutions; the others by a federal organization and private companies (including one non-profit). Five out of the six participants were well seasoned in the education sector with relevant experience ranging from 10 to 30 years. One participant had no education sector experience but was a veteran in the branding arena.

The six participants were very willing to participate and were appreciative of the opportunity to articulate their concerns and hopes regarding the Canada Education Brand. For the most part there was consensus regarding perceptions of the brand's strengths and weaknesses as well as preferences for visual elements of the brand. Overall, responses were fairly consistent with the twenty-one responses to the questionnaire with a few varying comments worth noting. While there was a general sense of optimism about the concerted effort to develop the Canadian Education Brand there was sufficient frustration and skepticism to warrant proceeding with caution and care.

Brand Perceptions

The participants were each asked to share their top of mind perceptions of the Canada Education Brand. While two out of the six participants stated a Canada Education Brand does not exist for comment, *"high quality education"* followed by *"safe"* and *"tolerant/welcoming/friendly"* were top of mind positive attributes most commonly mentioned by the others. In addition, *"affordable"* was cited by one respondent, who also cautioned that these attributes are *"All good things but they don't differentiate us from our competitors and those are not all true. We are not as friendly as we think we are."*

On the other hand, two respondents shared negative perceptions including *"disorganized"*, *"decentralized"* and perhaps therefore *"leaderless"*. Those who were seen as running the education business were cited as incompetent – they *"don't know what they're doing at least in the public sector; maybe not in the private universities."* In addition, Canada was deemed *"non competitive"* given the perceived lack of establishing partnerships and was considered to be "*behind the ball - we're losing ground on the international level.*" This particular respondent warned that, "*...other countries are working hard and placing far more emphasis on the value of internationalization. They are moving ahead and we are not!*"

When asked to define the Canada Education Brand's current strengths and weaknesses, responses were generally consistent with the top of mind attributes. The most commonly mentioned strengths were:

- *"High quality education"*
  - *"We should promote quality. There is a lot of opportunity for Canadian graduates to further their education and pursue careers because of the quality education."*
  - *"We have a great education system – a North American system (considered very good by international standards). We provide good supervision of our students through the system to make sure they have the tools to be successful."*
- *"Less expensive";*
- *"Being a multicultural country we are very warm and welcoming";* and
- *"Safe"*

Other single mentions included the general reputation of Canada, *"ranked around the world as the 3rd greatest nation to live in terms of reputation"* and a reference to Canada's research capabilities, albeit unenthusiastic - "*We have pretty good research labs.*"

Although not necessarily a strength, one participant felt the fact that Canadian education stakeholders were beginning to collaborate was significant progress that now puts Canada in the game - *"We are finally understanding what the international market is all about. We finally are getting together and getting support from the government - makes us look like we are truly ready to be players in the market."*

The list of weaknesses of the Canada Education Brand cited by participants was more varied than the list of strengths but nonetheless compelling and in some instances quite critical.

Two participants shared the opinion that a significant weakness is an international lack of awareness of what the Canada Education Brand stands for:

> *"There is no national unity/identification. People don't know much about Canada as a whole. They may know a province or a particular university or institution, but not Canada as a brand. We don't represent ourselves internationally. We represent ourselves in specific countries for specific reasons from an institutional standpoint."*
>
> *"Nobody knows who we are overseas as a country or from what I hear in the education sector. There is a real void to what the Canada Eduction brand offers."*

The *"decentralization of managing higher education"* has been heard before among respondents to the questionnaire, participants in discussions at NEMR as well as among these six interview participants. However, one interviewee felt compelled to state what was felt to be at the heart of this particular issue, that because of decentralization, *"...we are our own worst enemy because we can't get together as a country to promote ourselves as a whole."* This participant continued, somewhat emotionally, to provide a fairly negative and judgemental view of the playing field, stating, *"The provinces act like babies, the public universities don't know what they're doing and who knows what goes on in the private universities."*

Another participant shared a fairly pessimistic, somewhat defeatist point of view, stating the current effort to formally brand Canada as an education destination was too little too late – "*This process that is happening now (with regard to branding) is five years too late. We had our chance to capitalize on this international education market when 9/11 happened. Though terrible for the US, it could have been our ticket to making the rest of the world aware of who we are and what we offer not only in education, but in tourism and other industry."*

Two participants shared perceived weaknesses that hadn't previously surfaced in any significant way among respondents to the questionnaire, NEMR attendees or in any other relevant research. The first weakness was described as a critical short-sightedness among some universities that *"they lose money when they take in foreign students... because foreign students are not funded by the government like the Canadian students are."* The other perceived weakness speaks to the larger, more intellectual issue of globalization and suggests a potentially damaging ignorance or shortcoming - *"Canada doesn't understand the added value of international students at the PhD level. We are not looking at the future of our country in the world. How can we compete if we do not bring in the best and brightest of our future generations? How can we become a leader in research and education if we don't recruit and keep good PhD candidates?"*

Other single mentions included being *"second string to the USA"*, Canada's notorious cold weather, the perception that due to current Canadian immigration laws, it is *"very difficult for student to come to Canada"*, and the lack of "*star power institutions"* to compete with the likes of the *"UK's Cambridge and Oxford* or the *USA's Harvard, Yale and MIT."*

Lastly, one respondent continued a theme from a previous question, stating that Canada's tendency to emphasize low price, natural beauty and the "*...friendly, warm, fuzziness of Canadians"* put Canada in a weakened position as they are not true points of distinction.

Comparisons to Competitors

Participants were asked to list which five education destinations they believe are Canada's top competitors. Not surprisingly, the US, Australia and the UK were cited by all six participants as among the top five competitors, followed by New Zealand mentioned by four respondents. Two participants cited China among the top five competitors, calling it an "*up and coming threat*". Germany and Ireland were each mentioned once with Germany being noted as *"now offering a lot of English programs."* A somewhat interesting inclusion albeit by one participant was Nordic Countries.

After listing Canada's perceived competitors, participants were asked what they felt were Canada's ownable and sustainable advantages as an Education Brand over these key competitors. Most of the responses are consistent with previously stated strengths. *"Quality of academics"* and *"Offers various lifestyles/adventures"* were each mentioned by five out of the six participants. *"Quality of overall education experience", "Wide variety of programs and courses"* and *"Safe country"* received four nominations respectively. *"Fun place (to study)"* followed with three mentions and a *"Good study environment"* and *"low cost tuition"* were each cited twice. It is interesting to note that *"tolerance"* for others and *"good value for money"* each received only one mention as a distinguishing advantage along with a few other more random references.

Key Obstacles

When asked to list what they believed to be the top three obstacles to the successful identification, development and implementation of a desired Canada Education Brand, many weaknesses previously presented were reiterated although some were further defined, simplified or were expanded upon more broadly.

The lack of a clearly led, unified country approach was considered a significant obstacle, summarized by one participant as "*Everyone, every place has his or her own agenda and doesn't care about promoting the country as a whole to the world as an education destination."* One respondent was practically pleading to the provinces to *"understand that this will only help them."* Absence of government support was also cited - *"We don't work together as a country with the support of our government."*, and with a more direct reference to funding - *"Canada has simply not invested money in making people aware that Canada is a desired education destination."*

Image was cited as a key obstacle, specifically the image Canadians hold of themselves as the *"friendliest, safest people in the world"*, especially among key stakeholders of the Canada Education Brand, as well as the image Canadian schools hold of themselves as *"the best"*. In both cases, the self image was considered to be inaccurate among the international marketplace – "*We are no nicer than Australia or New Zealand nor are we any safer."* And "*We think we have the best* (schools) *and again, they are <u>very</u> good, but not necessarily better than all the schools in the USA like Harvard and Yale or the UK such as Cambridge or Oxford."* Interestingly, the participant who mentioned image added that self image alone is not the obstacle, but the inability of Canadians to accept or believe that they are wrong about their image. Separately though inextricably linked to the issue of image, another participant stated a critical branding challenge as the key obstacle – defining "*why are we better/unique/different than other countries?"*

Visual Elements

On a somewhat lighter note, participants were asked what visual elements they think a Canada Education Brand should include. Consistent with other related research, the maple leaf and the Canadian flag (including the color red) were mentioned the most although only by half of the participants. The physical beauty of the country was mentioned twice, once with the caveat that *"We need to emphasize the diversity of the people, the urban, suburban and rural beauty, but with people who represent us!"*

All other responses received single mentions including the following:

- the name Canada;
- words relating to students and education - *"The words must not be bureaucratic but it should be young and appealing to the young"*;
- Canadian celebrities - *"High profile people - actors, politicians, athletes - who have graduated from Canadian colleges/universities."*; and
- leveraging the CTC work

When asked what visual elements they thought the Canada Education Brand should NOT include, there was greater consensus. Four out of the six participants mentioned *"moose"*, *"mounties"*, *"mountains"* and *"polar bears"*. Overarching, inclusive comments, such as *"no animals"* and *"stereotypical symbols or anything cliché"* were mentioned three times.

Support for the Brand

Lastly, the six interviewees were each asked if they support the development of a desired Canada Education Brand. All six of them responded positively. Four of the six chose the opportunity to share some additional comments, with two of them cautioning the development of a brand separate from the CTC work - *"We need to make sure that this country doesn't go crazy branding everything separately. We need to all tie into some major country branding effort (like with the CTC). We will be in the same boat five years down the road with 15 different brands; that's like having no branding - where we are now."* Another respondent revealed a level of scepticism that could potentially be damaging to the momentum moving forward if felt by a significant number of stakeholders - *"I don't believe Canada will actually spend the money to develop the brand the way it should or could. In my mind it's not the brand that is the issue; it's the lack of investment to get the brand out there that is the issue."* And one of the interviewees provided the following quote that has the sound of a rallying cry for all key stakeholders:

> *"International education is moving away from going on holiday to getting a serious education that is going to help me in the future, therefore we need to get the point across to the world that we, Canada, can and do provide that. A Canadian education will provide serious education that will help build a resume and help people get opportunities and jobs in the future."*

*Summary of Responses**

*Responses are presented randomly within each question.

Type of organization:

- *Public educational institution* (three participants)
- *Federal organization (also a crown corporation)*
- *Private non-profit company*
- *Non- Government, private company*

Current position:

- *Director of International Education*
- *Executive Director Global Brand Integration*
- *President* (three participants)
- *Associate VP Academic International & Director of International office*

How long have you been in that position?

- *9 months*
- *13 months*
- *9 years*
- *10 years*
- *11 years*
- *16 years*

How long have you been working in the education sector?

- *Never*
- *10 years*
- *14 years*
- *25 years*
- *30 years* (two participants)

Please briefly provide your background in the sector (industry).

- *"I worked for another college in a similar capacity and before that I ran a study abroad office."*

- *"All of my time has been spent in this organization."*

- *"High School teacher"*

- *"First Director of International office at a University for the last 7 years and prior to that a full time professor at the university level."*

- *"I did the same thing with a different partner for a different company."*

- *"I have been in branding for 14 years. I've worked for Disney for 10 years then I worked for Park Canada."*

In terms of students and their influencers (parents, teachers, career advisors) who do you typically work with/address in your current position? If prospective students who wish to pursue an international education, at what level of study?

- *"We work to promote Canada as a whole."*

- *"I typically work with the agents overseas. I do work with some students at the first and second year University level."*

- *"I work with the other VPs and other colleagues at the direction of the University. I also work with Deans and Vice Deans of the programs of undergraduate level."*

- *"We work with the institutions themselves, not students. We only speak to students after they have purchased our insurance."*

- *"Staff, international connections, administrative people and students – that's 10% of my time. Ages 12 – 70 years old and all levels, individuals and corporate."*

- *"I have no direct contact with parents, students or advisors. I work with my staff who does that."*

What are the top three words or phrases that come to mind when you think of the Canada Education Brand?

- *"Not aware a brand exists. None come to mind because it's so diluted."*

- *From the student perspective it's:*
  1. *Safe - political stability of the country*
  2. *Tolerant country*
  3. *High quality of education*

  From my perspective it's:
  1. *Disorganized*
  2. *Incompetence - the people who run this business don't know what they're doing at least in the public sector maybe not in the private Universities.*
  3. *Leaderless*

- *1. High quality*
  2. Welcoming environment
  3. Safe environment

- *1. Decentralized – our country doesn't work strategically as a whole from a government stand point.*
  2. Non competitive - on an international level because we don't establish partnerships.
  3. Behind the ball - we're losing ground on the international level. This area of education has and continues to make great strides and other countries are working hard and placing far more emphasis on the value of internationalization. They are moving ahead and we are not!

- *"Non existent. There is no Canadian brand!"*

- *What it is:*
  1. Friendly
  2. Safe
  3. Affordable
  "All good things but they don't differentiate us from our competitors and those are not all true. We are not as friendly as we think we are."

  What it should be:
  1. Quality
  2. Value for money
  3. Respected (recognized internationally)

What do you believe are the strengths of the Canada Education Brand?

- *"High quality. Being a multicultural country, we are very warm and welcoming. A safe environment. Beautiful environment in which to live/study."*

- *"The quality of our education. The multicultural environment we have available. Less expensive."*

- *"The fact that it is tied to Canada. Canada is ranked around the world as the 3rd greatest nation to live in terms of reputation. Because of that I think students would want to study in this country. Beyond that they are not marketing themselves like other countries."*

- *"We are finally understanding what the international market is all about. We finally are getting together and getting support from the government - makes us look like we are truly ready to be players in this market."*

- *"We have a great education system – a North American system (considered very good by international standards). Our tuition is less expensive than many other countries' (except Europe). We provide good supervision of our students through the system to make sure they have the tools to be* successful. We have pretty good research labs."

- *"We should promote quality. There is a lot of opportunity for Canadian graduates to further their education and pursue careers because of the quality education."*

What do you believe are the weaknesses of the Canada Education Brand?

- *"The decentralization of managing higher education – we are our own worst enemy because we can't get together as a country to promote ourselves as a whole. The provinces act like babies, the public universities don't know what they're doing and who knows what goes on in the private universities.*

  We're always second string to the USA."

- *"Nobody knows who we are overseas as a country or from what I hear in the education sector. There is a real void to what the Canada Eduction brand offers."*

- *"Cold weather. To a lesser degree, a lack of brand name institutions such as the UK's Cambridge and Oxford, USA's Harvard, Yale and MIT. We don't have the same star power."*

- *"Canada doesn't understand the added value of international students at the PhD level. We are not looking at the future of our country in the world. How can we compete if we do not bring in the best and brightest of our future generations? How can we become a leader in research and education if we don't recruit and keep good PhD candidates?*

  Our immigration laws are terrible for incoming students. We make it very difficult for student to come to Canada.

  Because foreign students are not funded by the government like the Canadian students are, there is a ridiculous feeling by many universities that they loose money when they take in foreign students"

- *"There is no national unity/identification.*

  People don't know much about Canada as a whole. They may know a province or a particular university/institution, but not Canada as a brand. We don't represent ourselves internationally. We represent ourselves in specific countries for specific reasons from an institutional standpoint.

  This process that is happening now (with regard to branding) is five- years too late. We had our chance to capitalize on this international education market when 9/11 happened. Though terrible for the US, it could have been our ticket to making the rest of the world aware of who we are and what we offer not only in education, but in tourism and other industry."

- *"Pushing low price.*

Pushing the natural beauty of Canada – it doesn't work anymore. Other places are equally as beautiful.
Pushing the friendly, warm, fuzziness of Canadians – we're no nicer than any other country."

Which education destinations do you believe are Canada's top five competitors?

Education Destination	# of Mentions
Australia *"Not because of the quality of the system, but because of their aggressive recruitment efforts internationally"*	6
UK	6
USA	6
New Zealand	4
China *"China is quickly becoming a competitor – it's the new trend"* *"China is an up and coming threat – a competitor within the next 5 years"*	2
Germany *"Niche….they are now offering a lot of English programs."*	1
Ireland	1
Nordic Countries	1
"I can't think of another and the only reason I chose the ones mentioned is because of how they market themselves in global tourism/trade." (respondent cited four countries) *"I really don't see any others as major competitors"* (respondent cited three countries)	1 1

What do you believe are the ownable and sustainable advantages the Canada Education Brand has over its key competitors?

Perceived Advantage	# of Mentions
Quality of academics	5
Offers various lifestyles/adventures	5
Quality of overall education experience	4

Wide variety of programs and courses	4
Safe country	4
Fun place (to study)	3
Good study environment	2
Low cost tuition	2
Good value for money	1
Easy to get a study visa	1
Possibility of immigrating after graduation	1
Good career prospects in home countries after graduation	1
A uniqueness to the country	1
Multicultural tolerance for other cultures, religions, colors, creeds	1

What do you believe are the top three obstacles to the successful identification, development and implementation of a desired Canada Education Brand?

- *"Canada has simply not invested money in making people aware that Canada is a desired education destination.*

  The provinces are a bunch of squabbling hens who can't or won't cooperate with each other effectively. We don't work together as a country with the support of our government. Everyone, every place has their own agenda and doesn't care about promoting the country as a whole to the world as an education destination."

- *"Lack of country unification and/or support in this area.*

  A misunderstanding of what's happening on a global level in international education on our country's behalf.
  Lack of recognition of the importance of this sector internationally.

  And immigration laws are much too difficult."

- *"Federal government support.*

  Unification of the country - the provinces have to understand that this will only help them. They shouldn't and can't fight it.

  From both government and provincial perspectives the obstacles are all based on cooperation and support."

- *"The image Canadians have of themselves will get in the way. We think we are the friendliest, safest people in the world. We are not, but don't tell us that because we won't believe it. We are no nicer than Australia or New Zealand nor are we any safer.*

  The image our schools have of themselves. Our perception of our universities is not the world's reality. We think we have the best and again, they are very good, but not necessarily better than all the schools in the

USA like Harvard and Yale), the UK such as Cambridge or Oxford.. These are internationally recognized as the world's best."

- *"Our inability to work together as a whole country and we don't have a leader or champion to take this on."*
- *"Competition, finding a value proposition - why are we better/unique/different than other countries?"*

What visual elements do you think a Canada Education Brand should include?

Visual Element	# of Mentions
The maple leaf	3
The Canadian flag *"...has worldwide recognition with a positive connotation."*	3
The physical beauty of the country	2
People *"If you show anything make sure that our people are included in the visual. They are an example of the beauty of our country. We need to emphasize the diversity of the people, the urban, suburban and rural beauty, but with people who represent us!"*	1
"High profile people - actors, politicians, athletes - who have graduated from Canadian colleges/universities."	1
The color red (of the flag)	1
The name Canada	1
Words relating to students and education *"The words must not be bureaucratic but it should be young and appealing to the young."*	1
"Urban sophistication of the country"	1
"We should be working with and off of what the CTC is doing for our country right now trying to re-brand us!"	1
"I will not comment on this. I do not care about branding and marketing on paper or in collateral. I need to know that the country is putting together a strategic plan to recruit and become a focused country when it comes to the internationalization of education."	1

What visual elements do you think it should NOT include?

Visual Element	# of Mentions
Moose	4
Mounties	4
Mountains	4
Polar Bears	4
Stereotypical symbols or anything cliche	2
"No animals!"	1
"Again, I do not care about the pictures or the collateral material. I can not believe this is important until Canada can prove that they have a comprehensive strategy in place to actually focus on this area."	1

Do you support the development of a desired Canada Education Brand?

"Yes" - all six respondents

Additional comments:

- *"I hope they don't go recreate another brand. I hope there's a link to the national brand and we build our voice collectively. Just a big caution not to recreate another brand. A new division should be tied to the "mother" or in this case "nation" brand. Let's find a way to work together as a country."*
- *"I don't believe Canada will actually spend the money to develop the brand the way it should or could. In my mind it's not the brand that is the issue; it's the lack of investment to get the brand out there that is the issue."*
- *"We need to make sure that this country doesn't go crazy branding everything separately. We need to all tie into some major country branding effort (like with the CTC). We will be in the same boat five years down the road with 15 different brands; that's like having no branding - where we are now."*
- *"International education is moving away from going on holiday to getting a serious education that is going to help me in the future, therefore we need to get the point across to the world that we, Canada, can and do provide that. A Canadian education will provide serious education that will help build a resume and help people get opportunities and jobs in the future."*