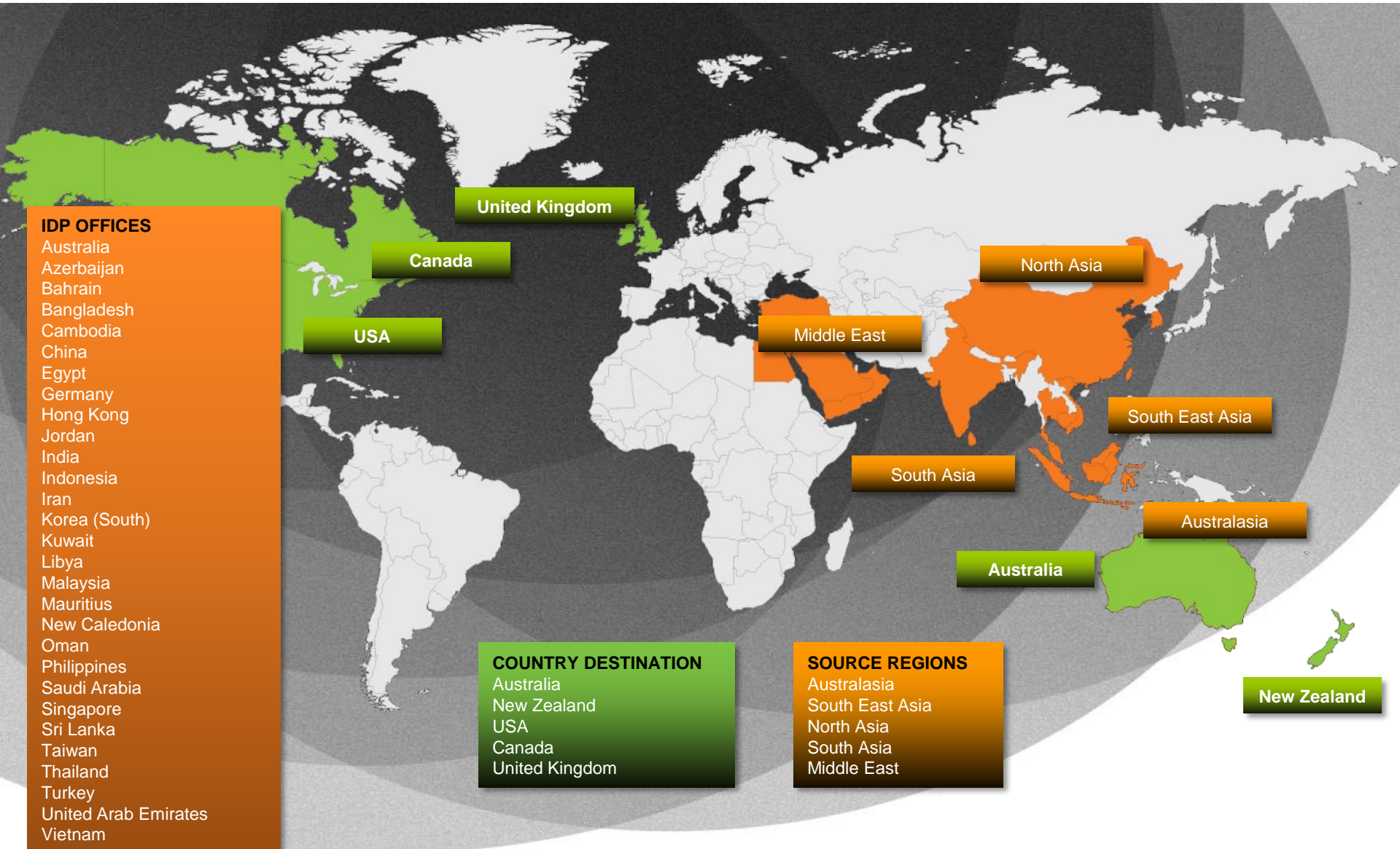


# The Competitive Landscape for Recruitment to English-Speaking Destinations



Uri Carnat, Country Director, IDP Education Canada

# IDP places students in English speaking destinations



# IELTS runs English language tests globally

## IDP IELTS Locations

Australia  
Argentina  
Bangladesh  
Cambodia  
Canada  
Colombia  
Fiji  
Hong Kong  
India  
Indonesia  
Iran  
Kazakhstan  
Kenya  
Korea  
Kuwait  
Laos  
Libya  
Malaysia  
Mauritius  
Mexico  
Nepal  
Netherlands

New Caledonia  
New Zealand  
Oman  
Pakistan  
Papua New Guinea  
Philippines  
Qatar  
Russia  
Singapore  
Solomon Islands  
South Africa  
Sri Lanka  
Taiwan  
Thailand  
Timor Leste  
Tonga  
Ukraine  
United Arab Emirates  
United States of  
America  
Vanuatu  
Vietnam



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# International Education Events

150 annual recruitment events

Australian International Education Conference (AIEC)

CamTESOL Conference





# IDP Industry Trends Overview



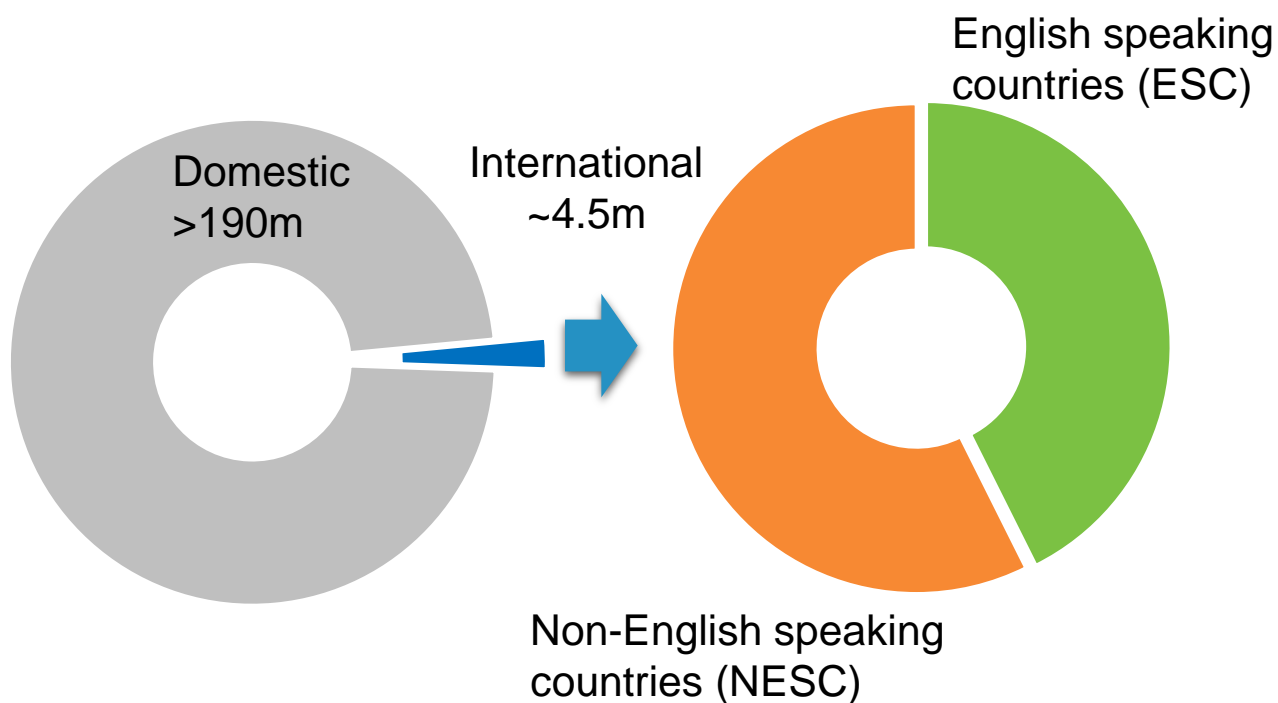
**November 2016**

# International Education landscape

**Global  
HE students**

**International HE  
students**

**International Education  
Alternatives**



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

# Global - International student flows

## International Student Enrolments: 2000-2012

In 2012, over 4.5 million tertiary students enrolled outside their country of citizenship - **a CAGR of 6.4% over the last decade**

## International Student Enrolments: Future global estimates

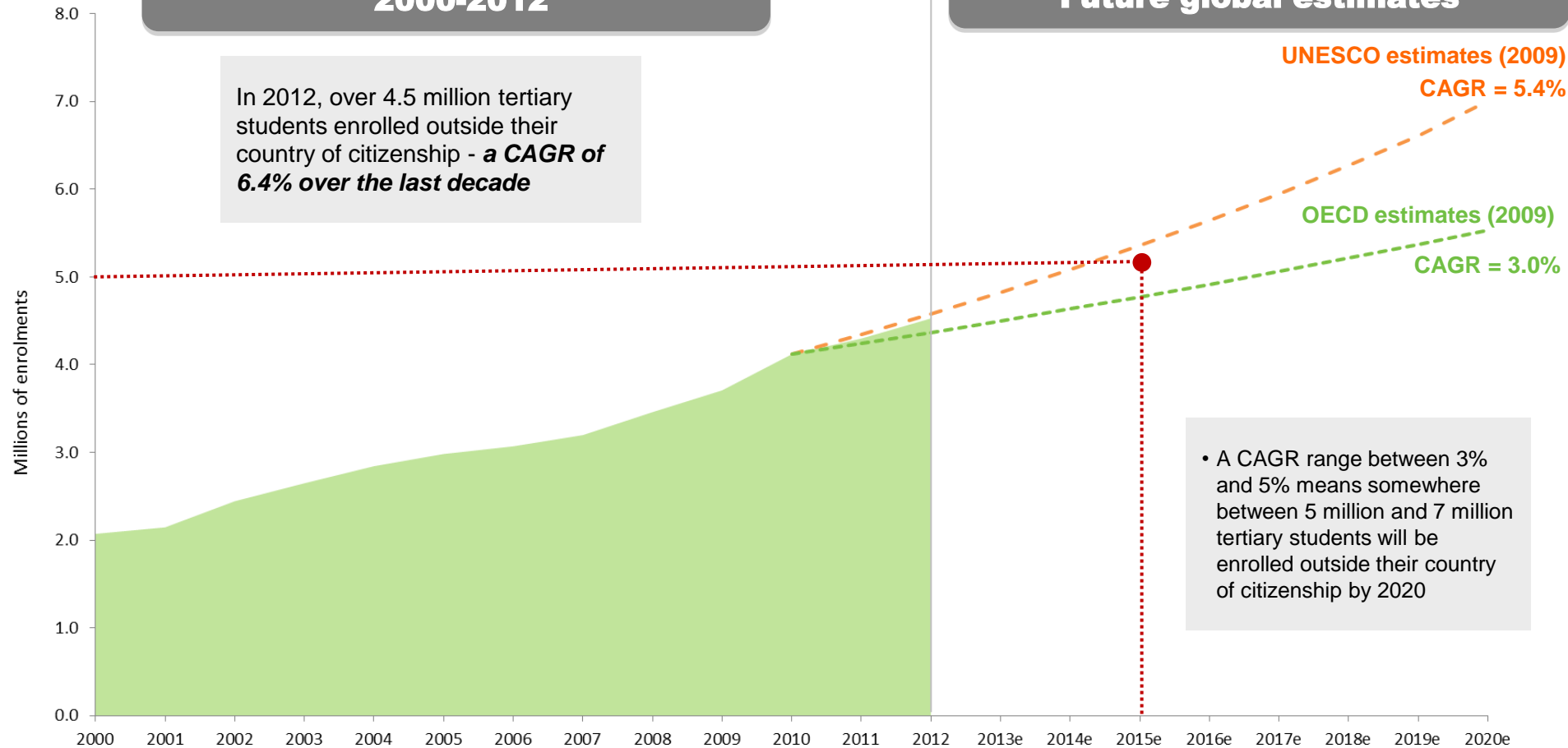
UNESCO estimates (2009)

CAGR = 5.4%

OECD estimates (2009)

CAGR = 3.0%

- A CAGR range between 3% and 5% means somewhere between 5 million and 7 million tertiary students will be enrolled outside their country of citizenship by 2020



CAGR = compound annual growth rate

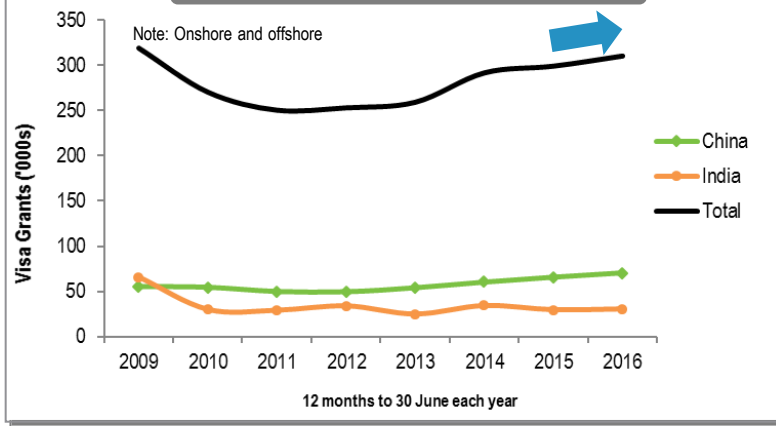


Steady growth in international student flows likely to continue

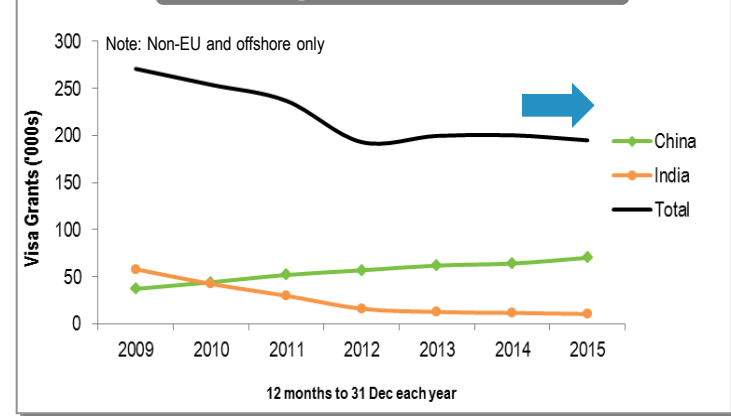


# English speaking destinations: visa trends

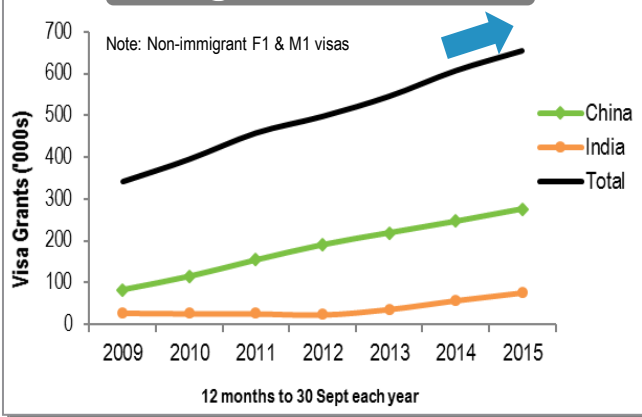
## Visa grants to Australia



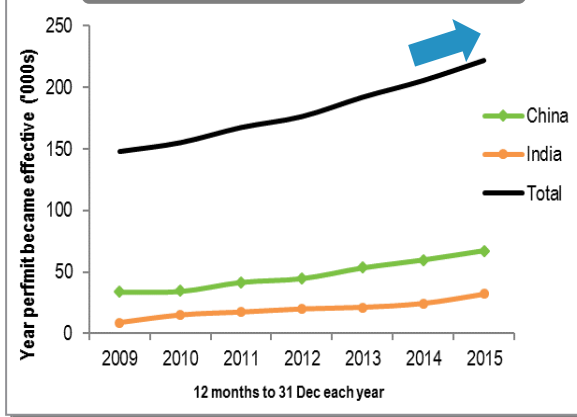
## Visa grants to the UK



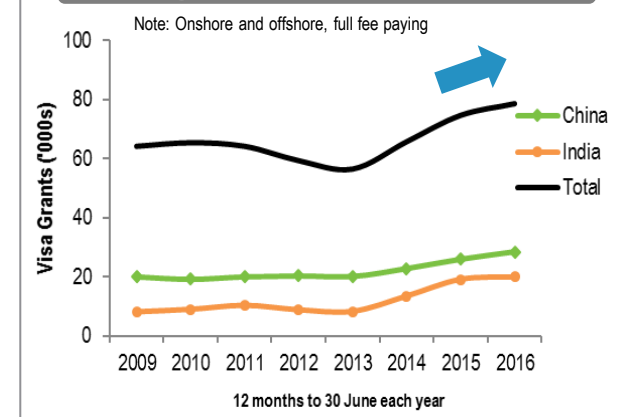
## Visa grants to the USA



## Visa grants to Canada

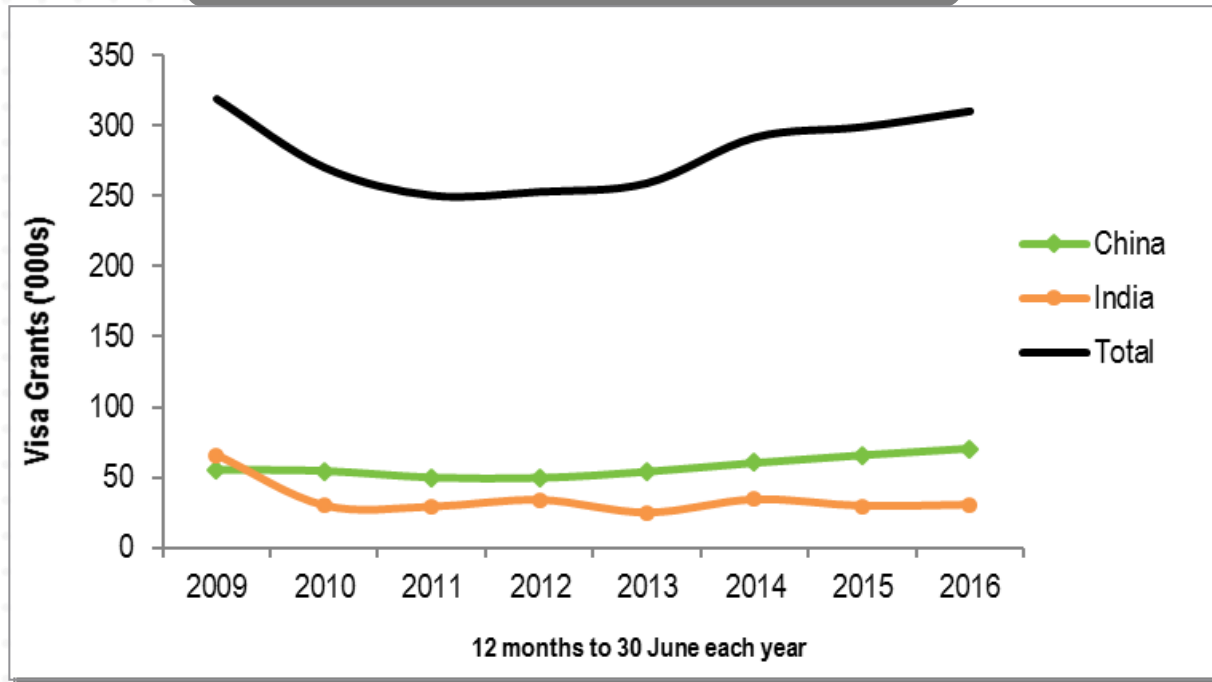


## Visa grants to New Zealand



# English speaking destinations: visa trends

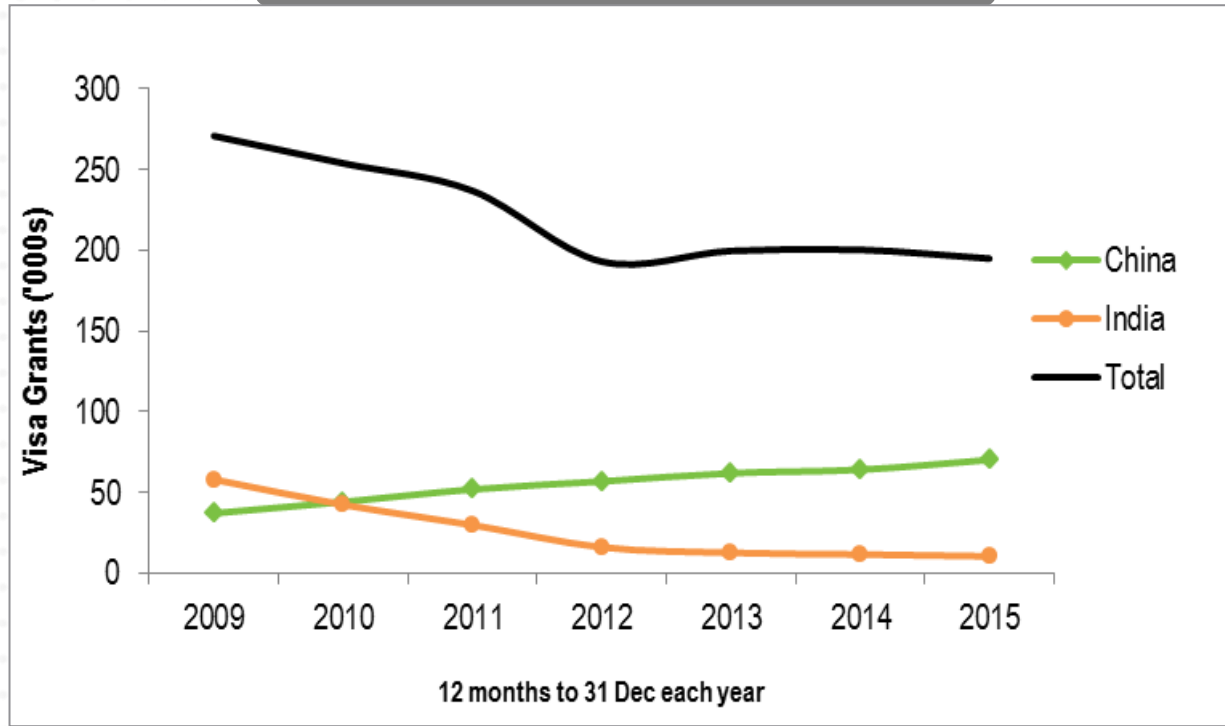
## Visa grants to Australia



- Visas down 2% in 2015, but offshore grants increased 18%
- Simplified Student Visa Framework – 2016 – not simplified

# English speaking destinations: visa trends

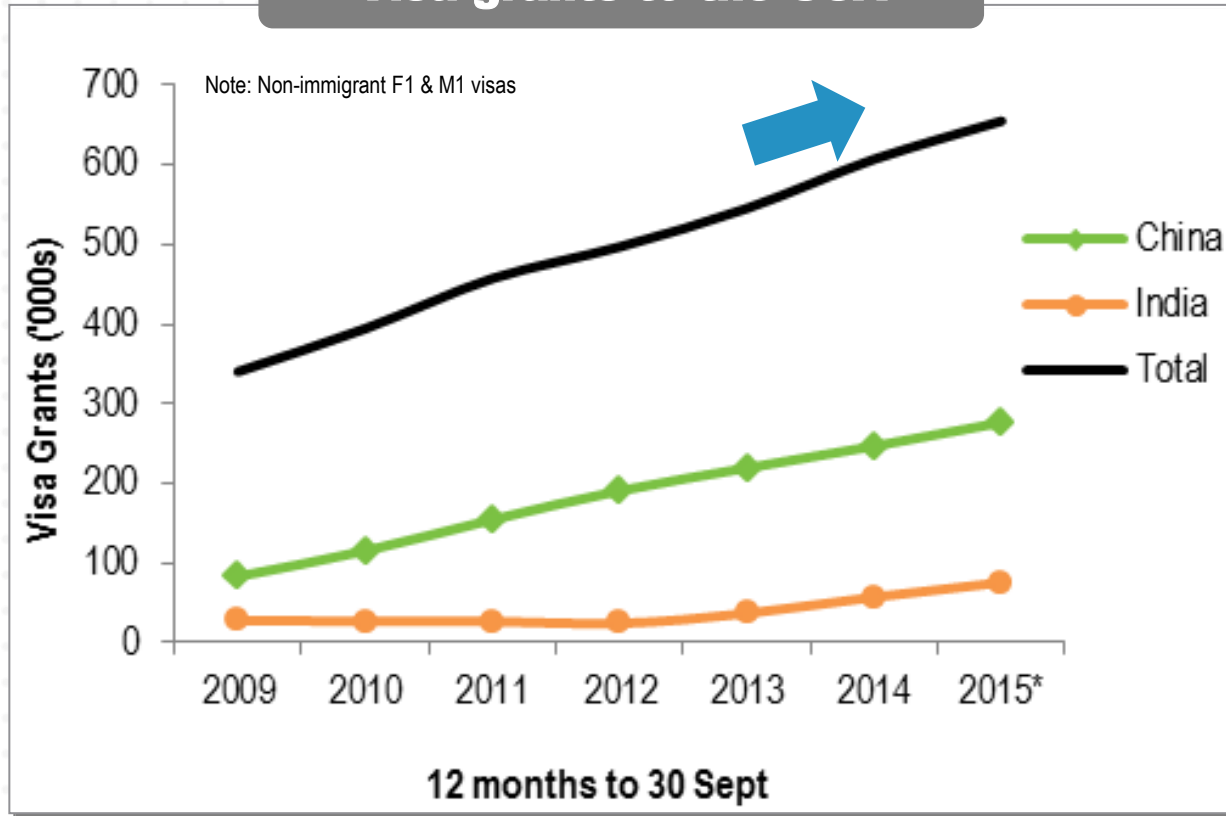
## Visa grants to the UK



- Enrolments flat, but Russell-Group universities +7%
- Indian student drop fueled by removal of post-graduation work and migration opportunities
- Brexit uncertainty – but currency advantages

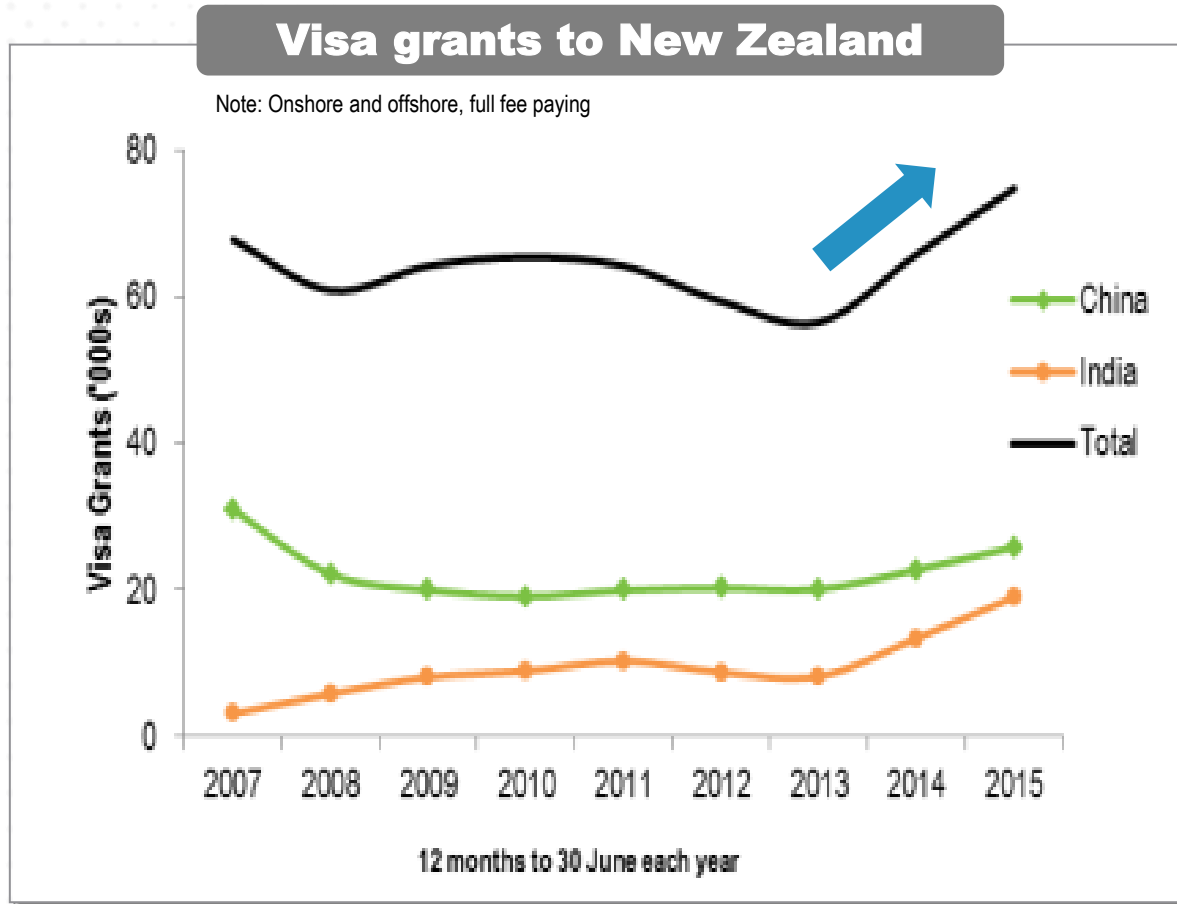
# English speaking destinations: visa trends

## Visa grants to the USA



- 8% year-on-year growth
- Ongoing China growth, and Indian students driving graduate
- STEM post-graduation work permission increased to three years
- India / China to be unaffected through Trump

# English speaking destinations: visa trends

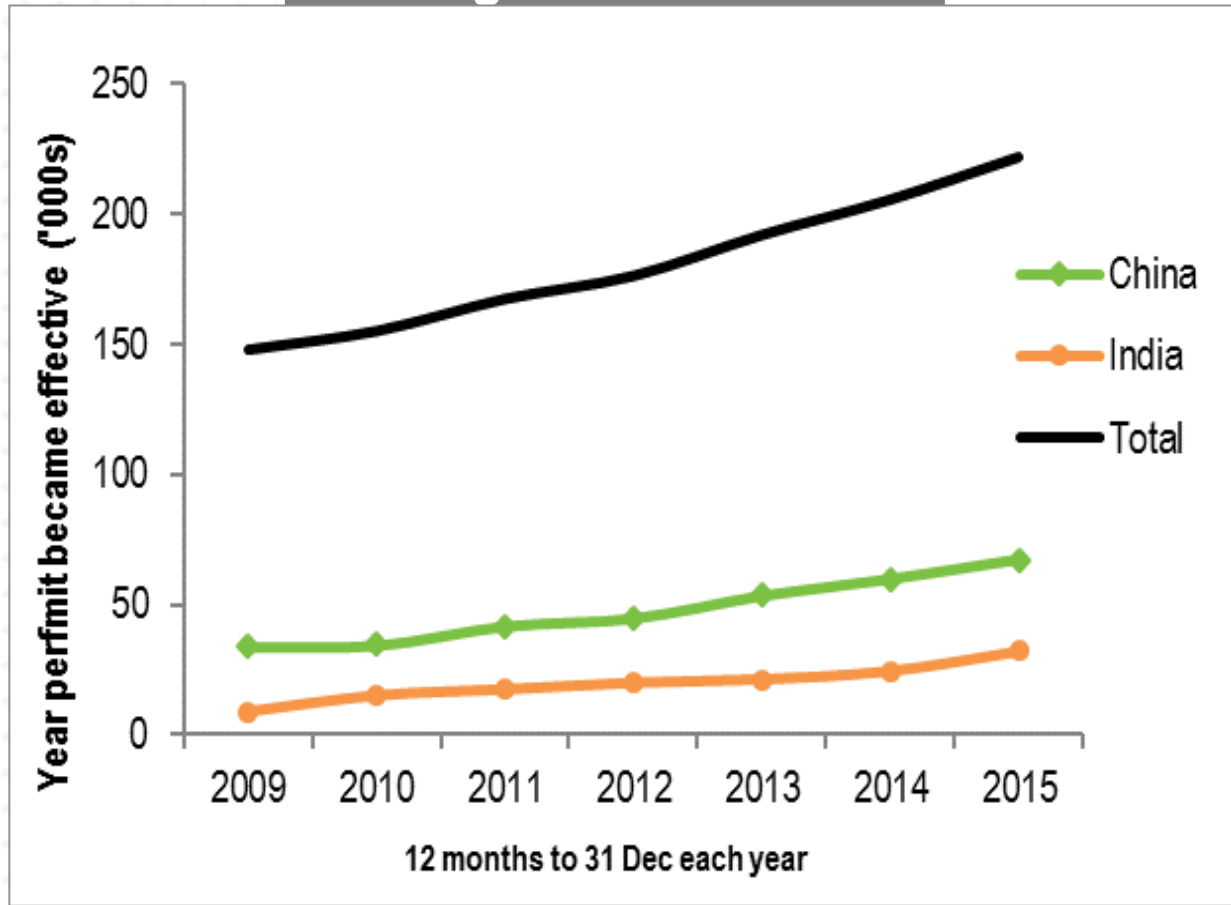


- Fastest-growing English-speaking destination
- Growth led by colleges and polytechnics
- Five-year pathway visa, immigration opportunities
- Recent visa denials for Indian students



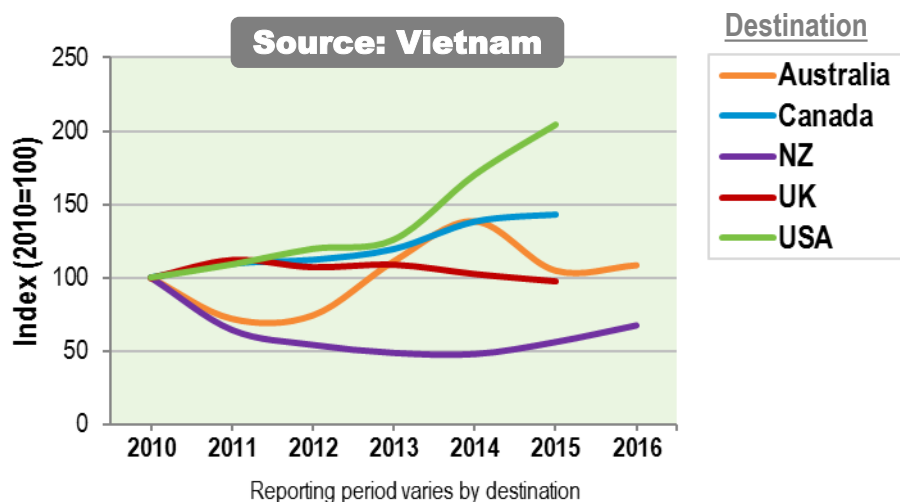
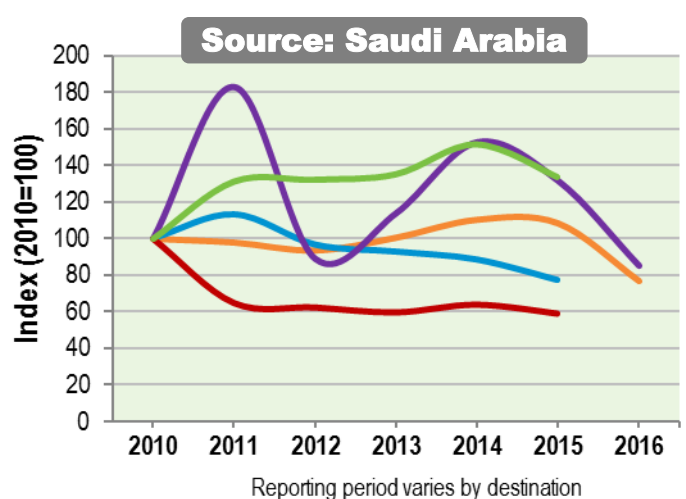
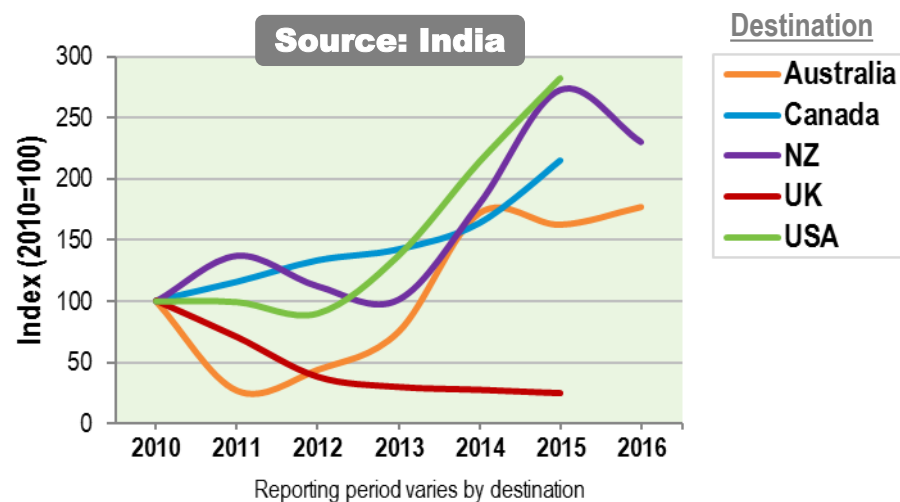
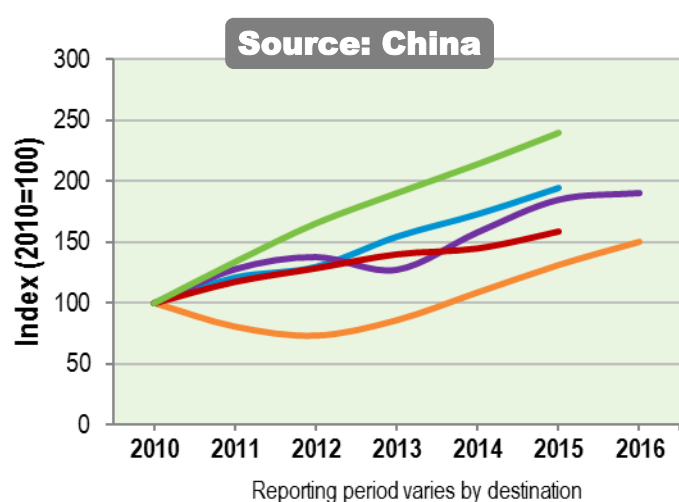
# English speaking destinations: visa trends

## Visa grants to Canada



- Flatter growth for 2015
- Political stability relative to UK, US, AU
- New Express-Entry benefits for students
- Irregular visa processing standards

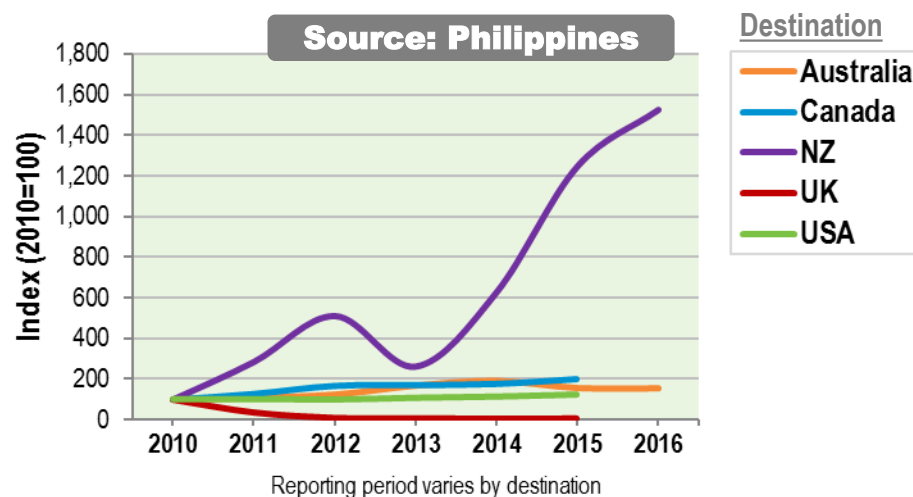
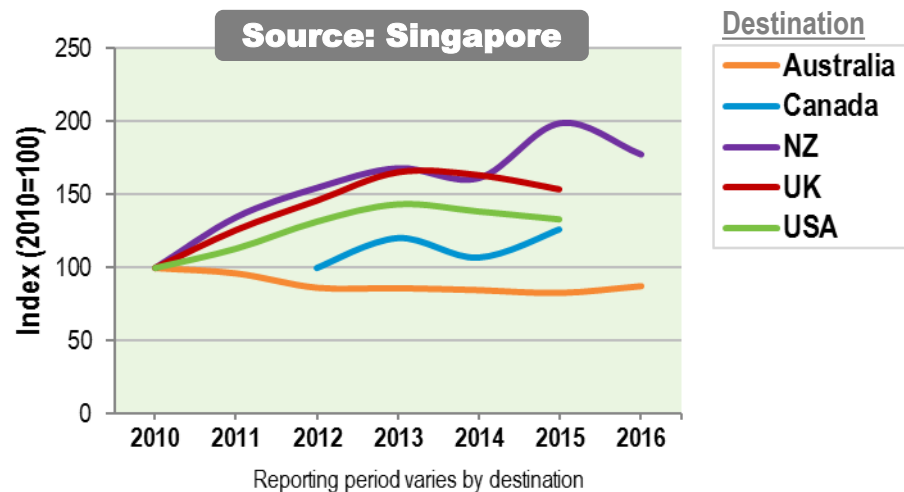
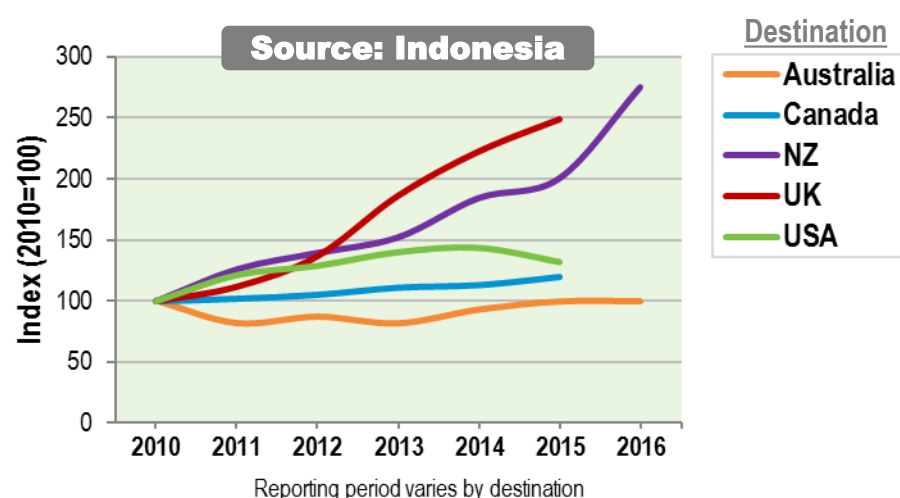
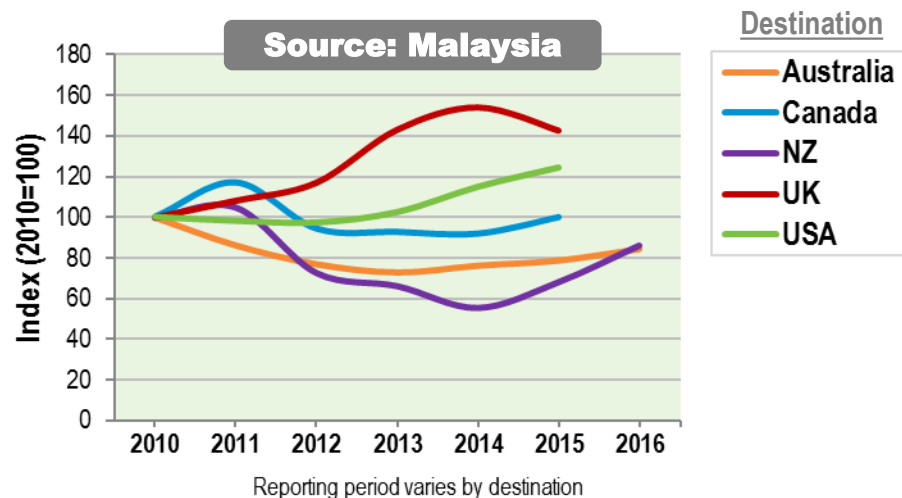
# Key source countries: visa grants growth (indexed to 2010)



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

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

# Key source countries in SE Asia: visa grants (indexed to 2010)



**Note:** Data based on Australia – offshore only, UK - offshore, non-EU only, Canada and US – total  
Singapore data for Canada is only available for 2012 onwards

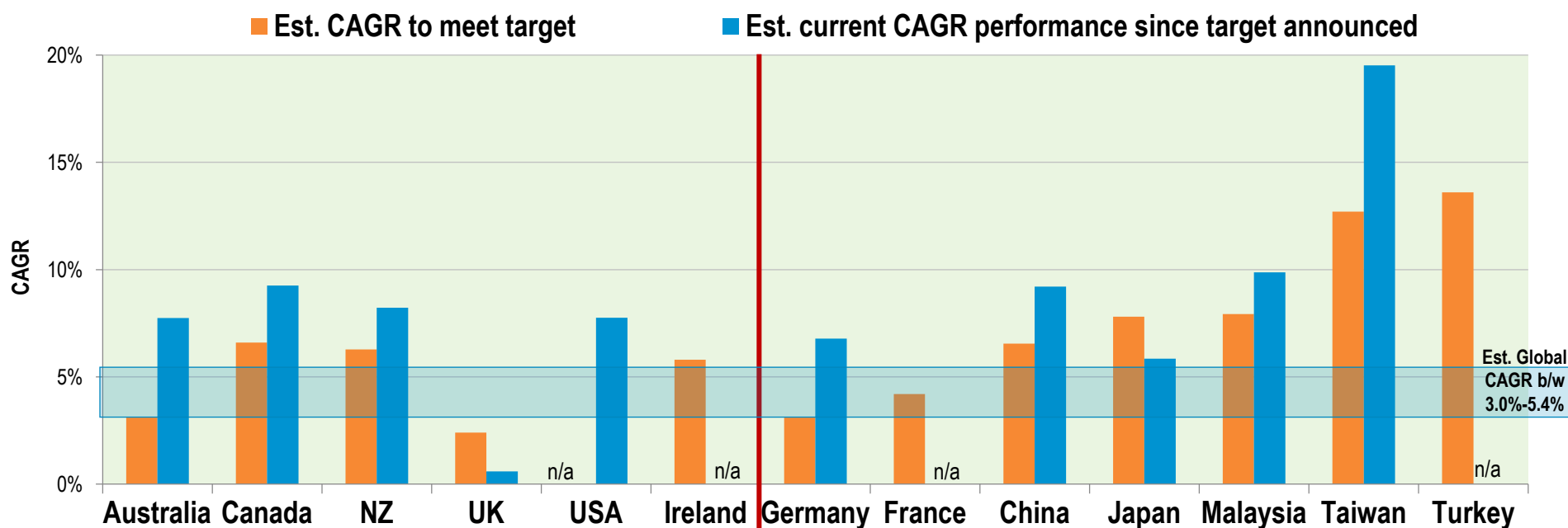
Sources: Australia DIBP, Canada CIC, NZ Department of Labour (Immigration), UK Border Agency, US Dept. of State

# Destination competition and ambitious targets

Country	Target	When
Australia	• Attract 520k international students	2020
Canada	• Double number of international students	2022
New Zealand	• Double economic value to \$5b	2025
UK	• Increase non-EU enrolments by 55,000 additional students	2020
Ireland	• Increase foreign student enrolment in HE by 33% and ELT by 25%	2020
Germany	• Host 350k foreign university students	2020
France	• Increase foreign HE enrolments to 20% of total enrolments (approx 70k)	2025
China	• Attract 500k international students (150k HE)	2020
Japan	• Double number of foreign students to 300k	2020
Malaysia	• Attract 250k international students	2025
Taiwan	• Attract 150k foreign students	2020
Turkey	• Host 200k international students	2023

# Destination growth targets: current status

**Estimates CAGR required to meet destination countries' international student targets in the next 5-10 years vs. current CAGR**



**Note: CAGR = compound annual growth rate**

*Notes: Global CAGR based on UNESCO 2009 and OECD 2009 estimates of between 5 and 7 million international tertiary students in 2020*

*For NZ, to estimate CAGR, assumed double number of international students*

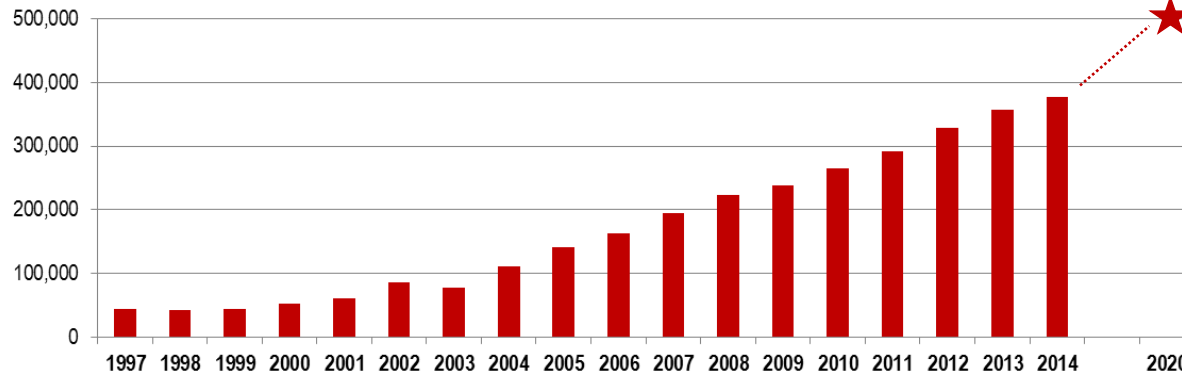
Data based on latest annual international student enrolment data

Sources: Education Target Reports from each Government - New Zealand, Canada, China, Japan, Malaysia, and Taiwan. Australia – Educating Globally report, UK - The Autumn Report 2015, Germany – DAAD's Strategy 2020, France - Minister of Higher Education, Turkish Prime Ministry's International Students Department, Ireland - Dept. of Education & Skills

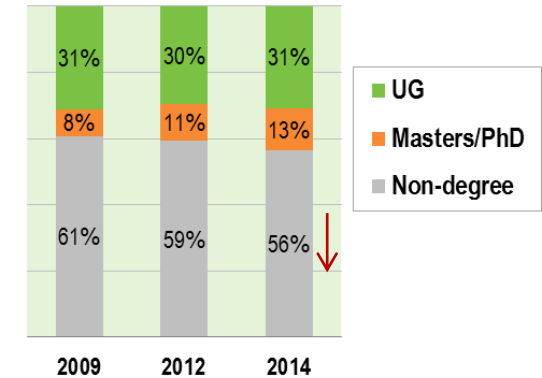


# Destination: China

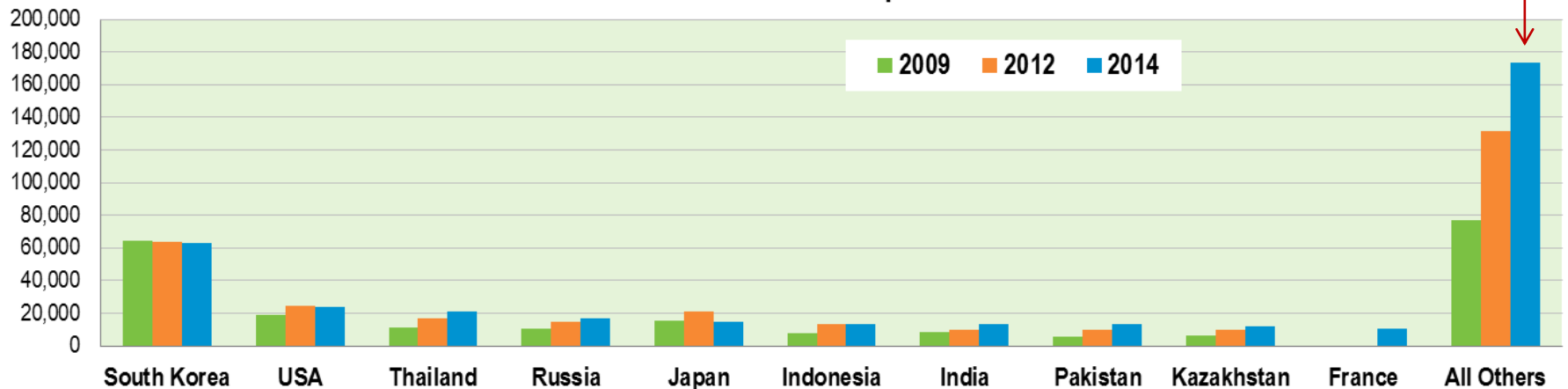
**No. of international students in China  
1997-2014**



**International Students in China  
by Sector**



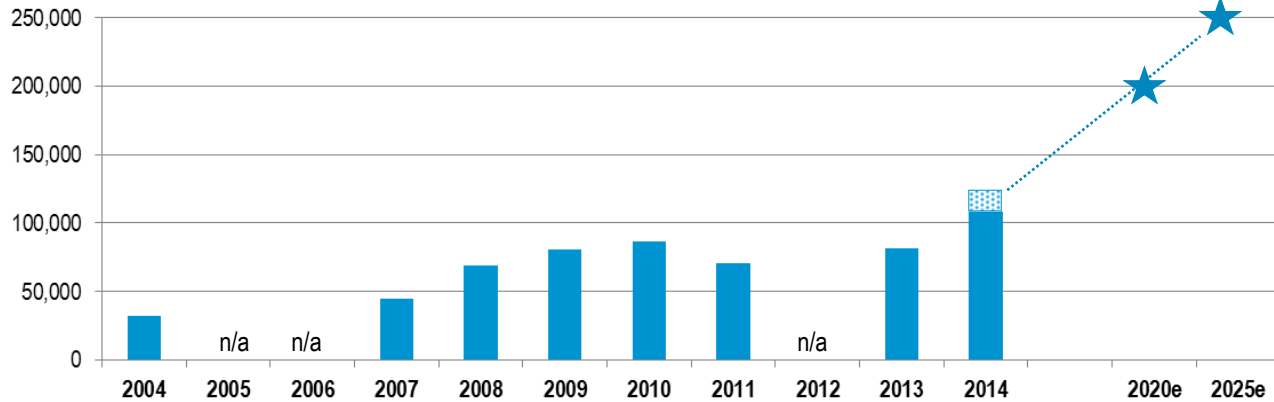
**International Students in China - Top 10 Source Countries**



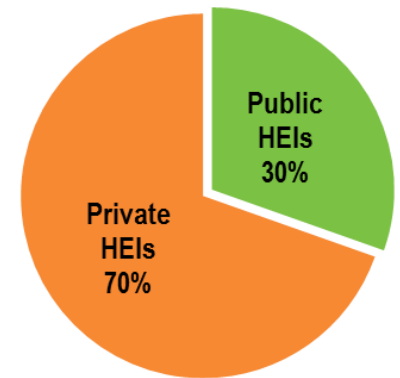
*Increasing diversity*

# Destination: Malaysia

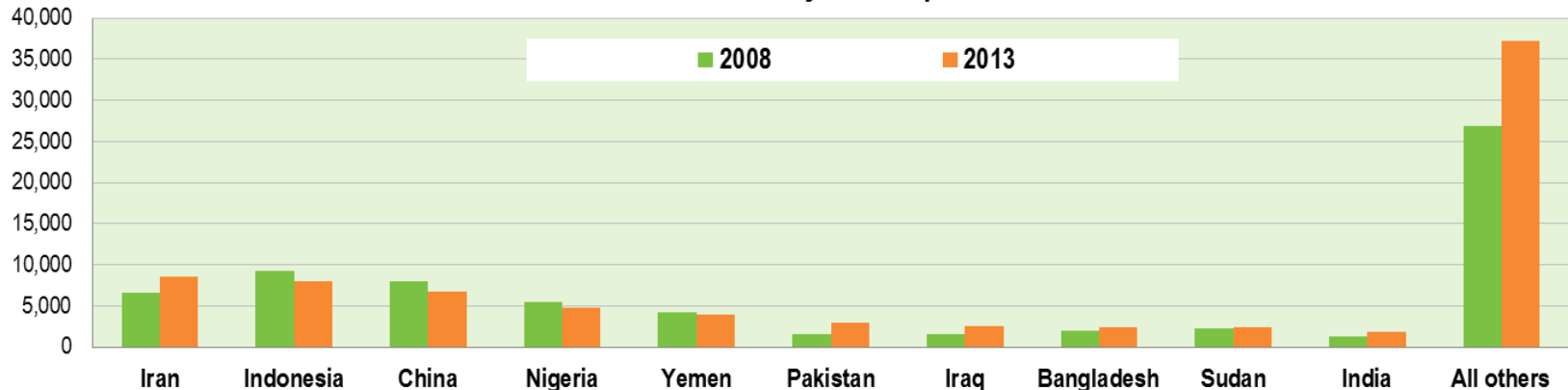
**No. of international students in Malaysia**  
2004-2014



**International students in Malaysia**  
by Institution Type - 2014



**International Students in Malaysia - Top 10 Source Countries**

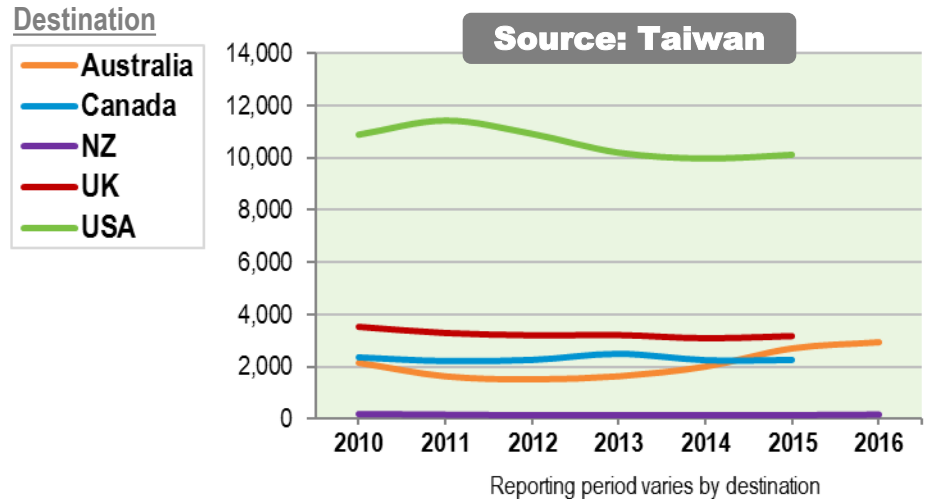
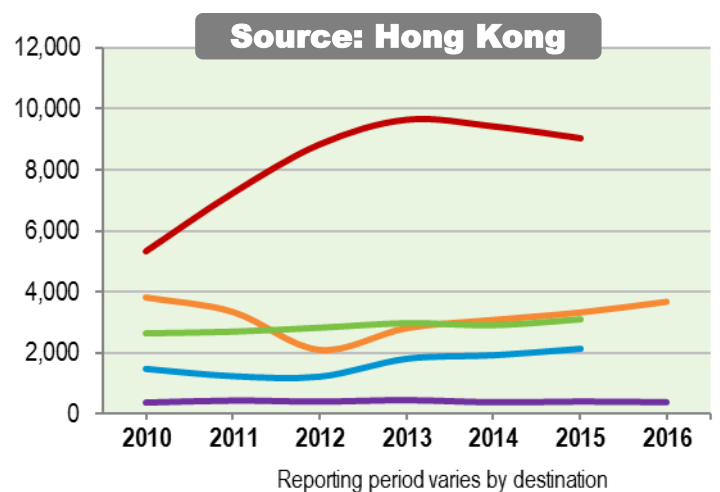
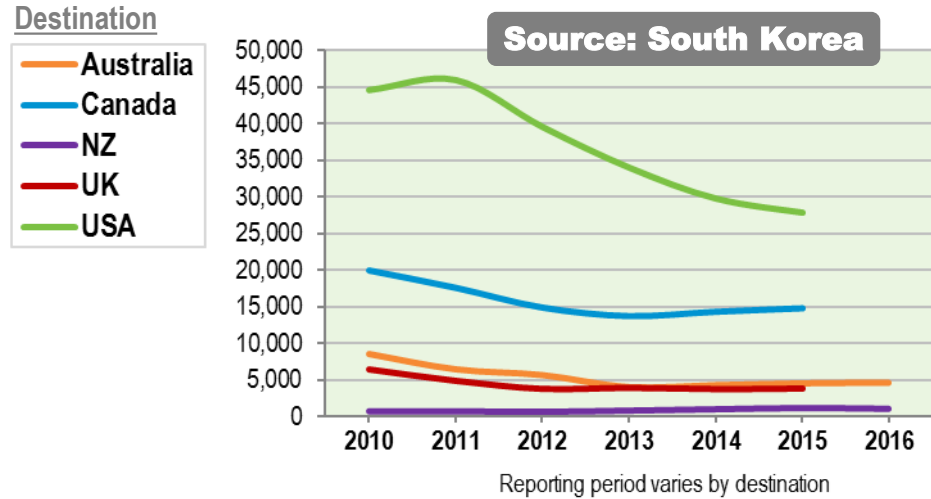
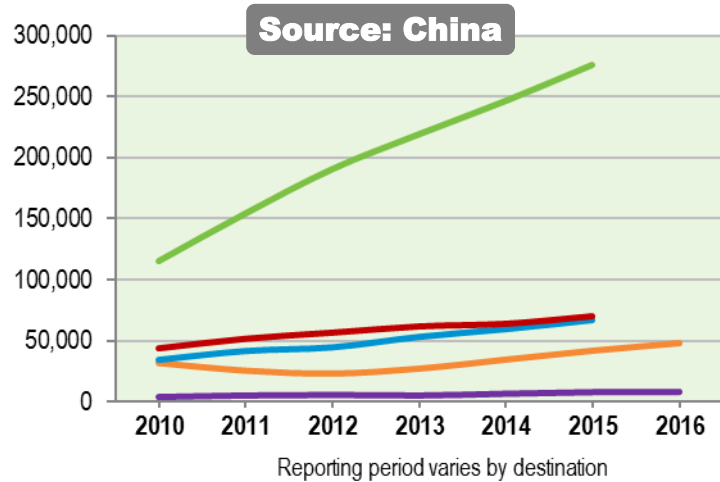


# APPENDIX – VISA GRANTS FOR IDP SOURCE COUNTRIES



SELECT COUNTRIES AS NEEDED

# Key source markets: student visa granted North Asia

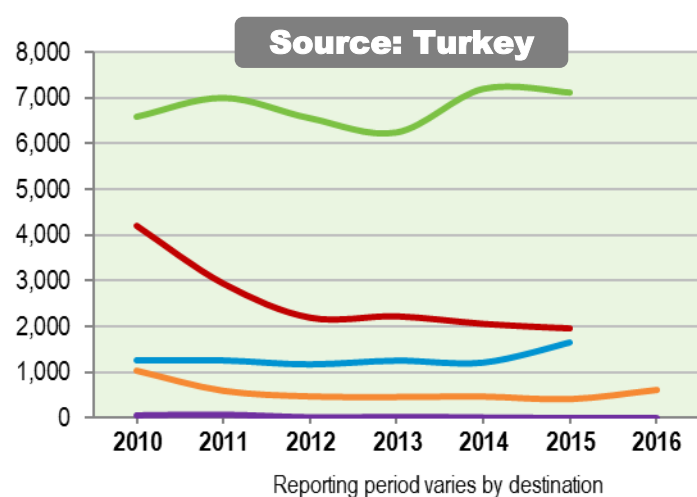
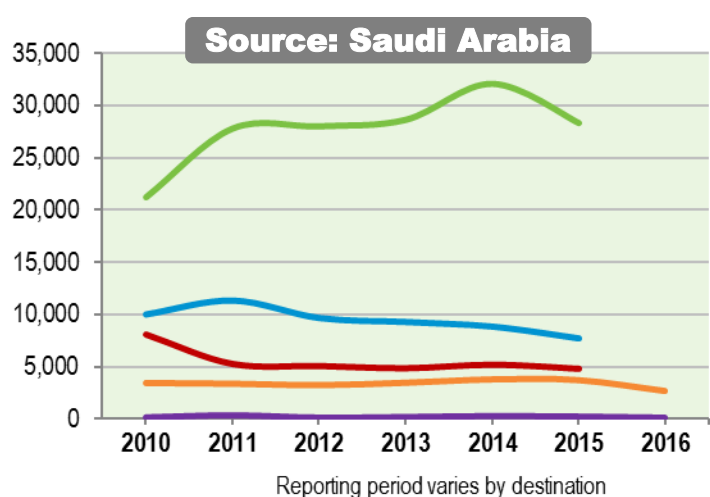
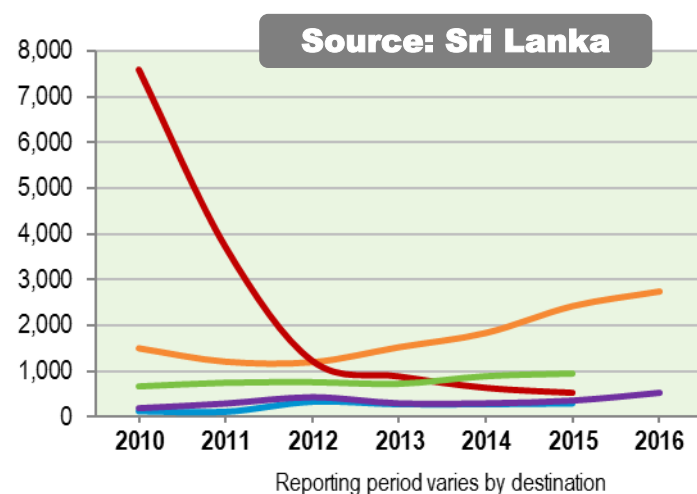
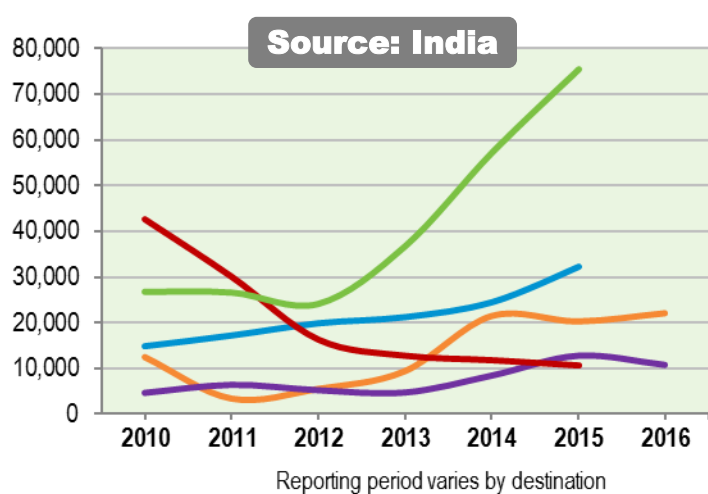


**Note:** Data based on Australia / NZ – offshore only, UK - offshore, non-EU only, Canada and US – total

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

# Key source markets: student visa granted

## South Asia/ Middle East



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

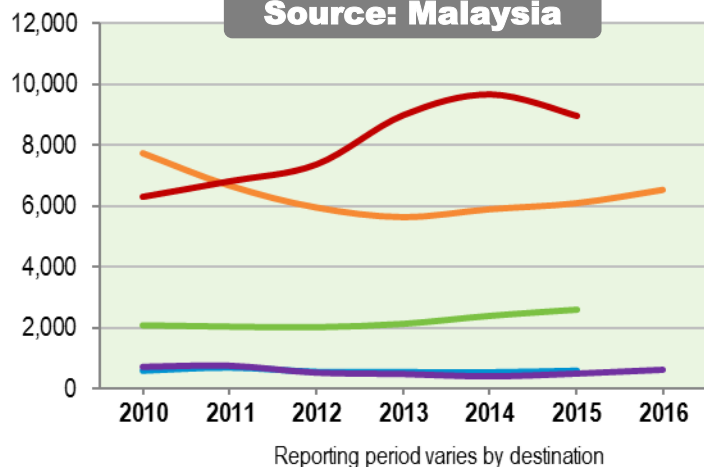
Sources: Australia DIBP, Canada CIC, NZ Department of Labour (Immigration), UK Border Agency, US Dept. of State



# Key source markets: student visa granted

## South East Asia

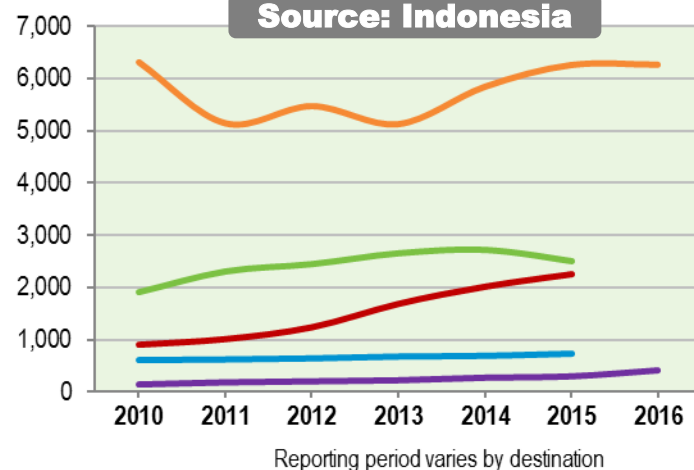
**Source: Malaysia**



Destination



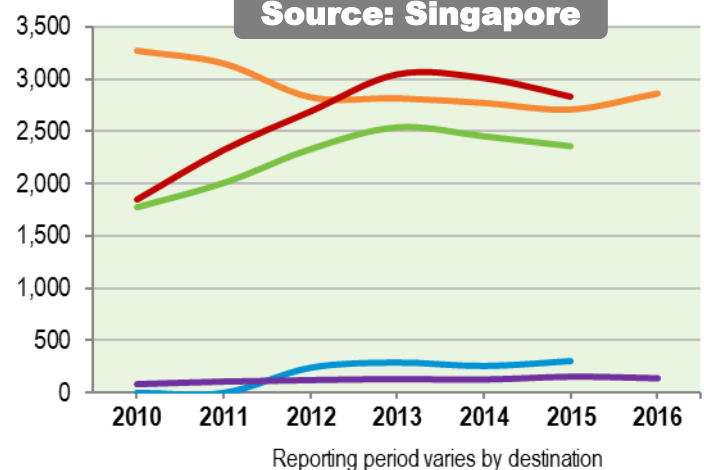
**Source: Indonesia**



Destination



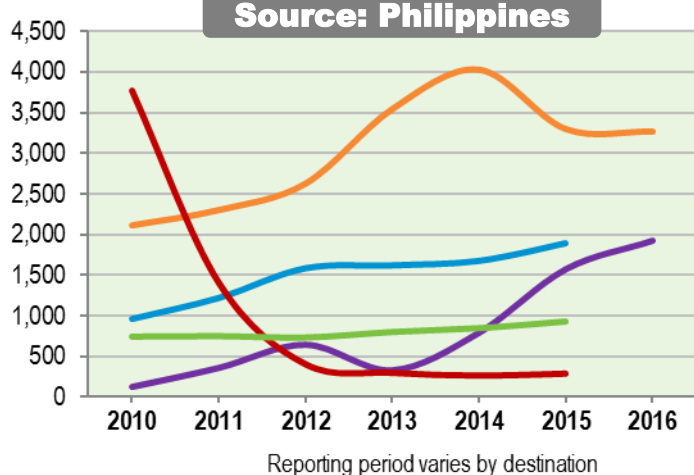
**Source: Singapore**



Destination



**Source: Philippines**



Destination



**Note:** Data based on Australia/ NZ – offshore only, UK – offshore, non-EU only, Canada and US – total  
Singapore data for Canada is only available for 2012 onwards

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



# IDP student buyer behaviour research 2016



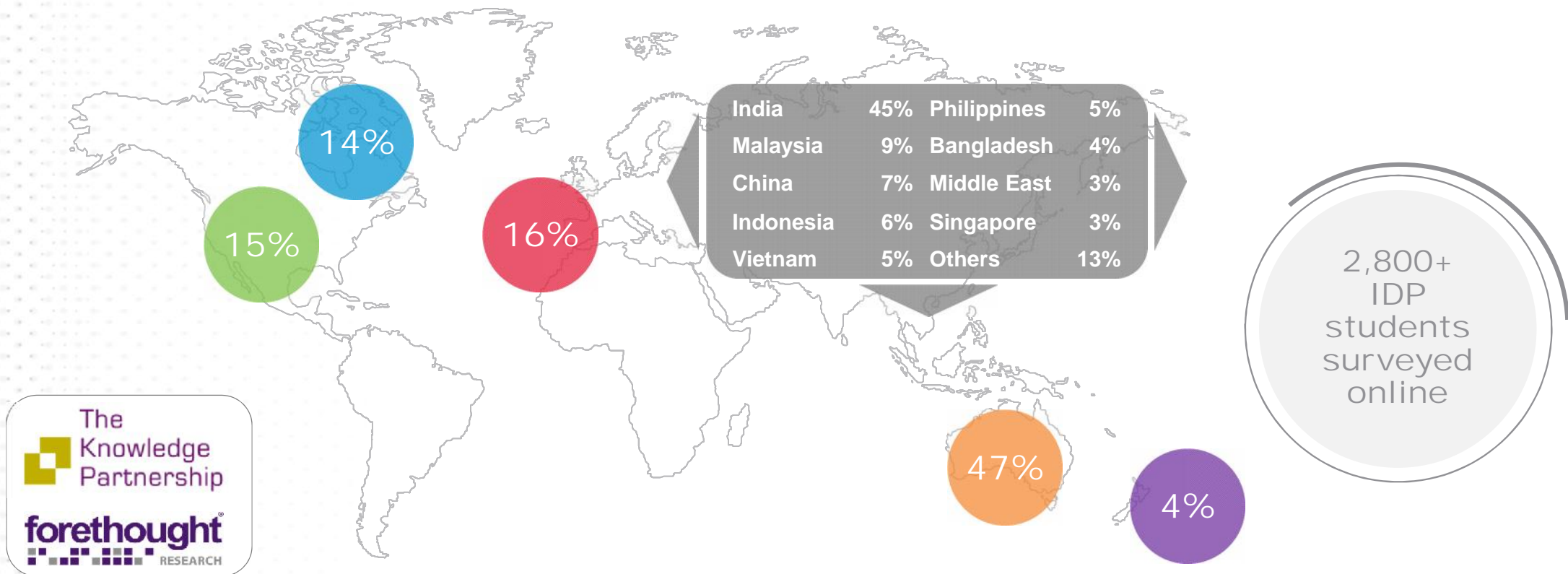
IDP Research Team

# IDP student participants



# Profile of respondents

In July 2016, we surveyed online of over 2,800 students who had used IDP's services



# Profile of respondents

Majority were postgraduates by coursework. Parents continued to be a key contributor of education funding.



## Study Intent

<b>Prospective</b>	<b>54%</b>
<b>Studying abroad</b>	<b>46%</b>



## Study Sector

<b>Eng. Language / Pathway</b>	<b>3%</b>
<b>Vocational/ Diploma</b>	<b>10%</b>
<b>Undergraduate</b>	<b>23%</b>
<b>PG Course</b>	<b>60%</b>
<b>PG Research</b>	<b>4%</b>



## Family studying abroad

<b>First in family to study abroad</b>	<b>60%</b>
<b>Siblings studying abroad</b>	<b>18%</b>

*Note: Responses do not add to 100%; only main responses shown*

IDP Student Buyer Behaviour Research 2016



## General Field of Study

<b>STEM</b>	<b>41%</b>
<b>Commerce &amp; Management</b>	<b>32%</b>
<b>Humanities &amp; Social Sciences</b>	<b>10%</b>
<b>Health</b>	<b>9%</b>



## Education Funding

<b>My parents</b>	<b>76%</b>
<b>Myself</b>	<b>16%</b>
<b>Other relatives</b>	<b>9%</b>
<b>Scholarship</b>	<b>21%</b>

*Note: Multi-response question*



## Type of Scholarship

<b>University</b>	<b>44%</b>
<b>Government in my home country</b>	<b>35%</b>
<b>Government of study country</b>	<b>8%</b>

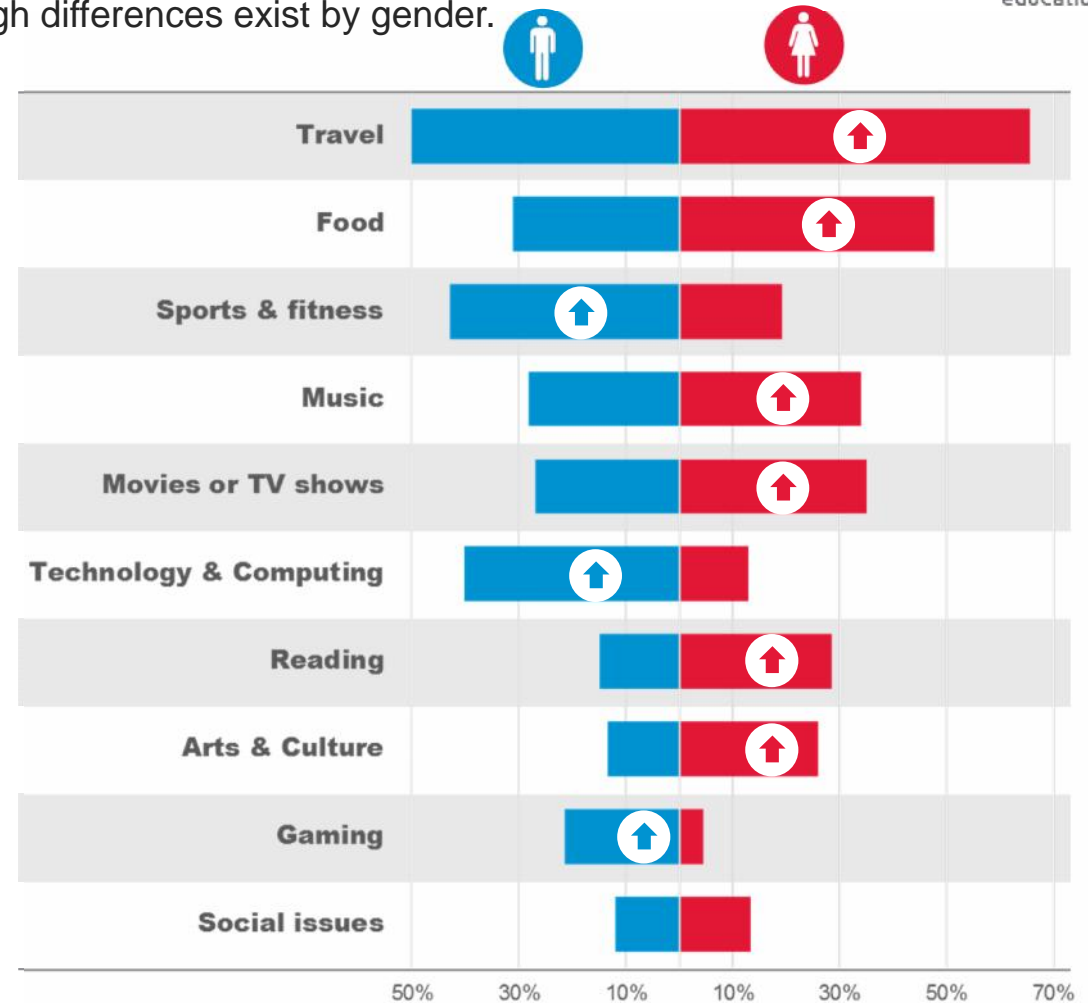


# Students' Interests & Hobbies

Travel and food were the 2 top interests for students, though differences exist by gender.



IDP Student Buyer Behaviour Research 2016








# IDP students' expectations & views



# Are students' international study expectations being met

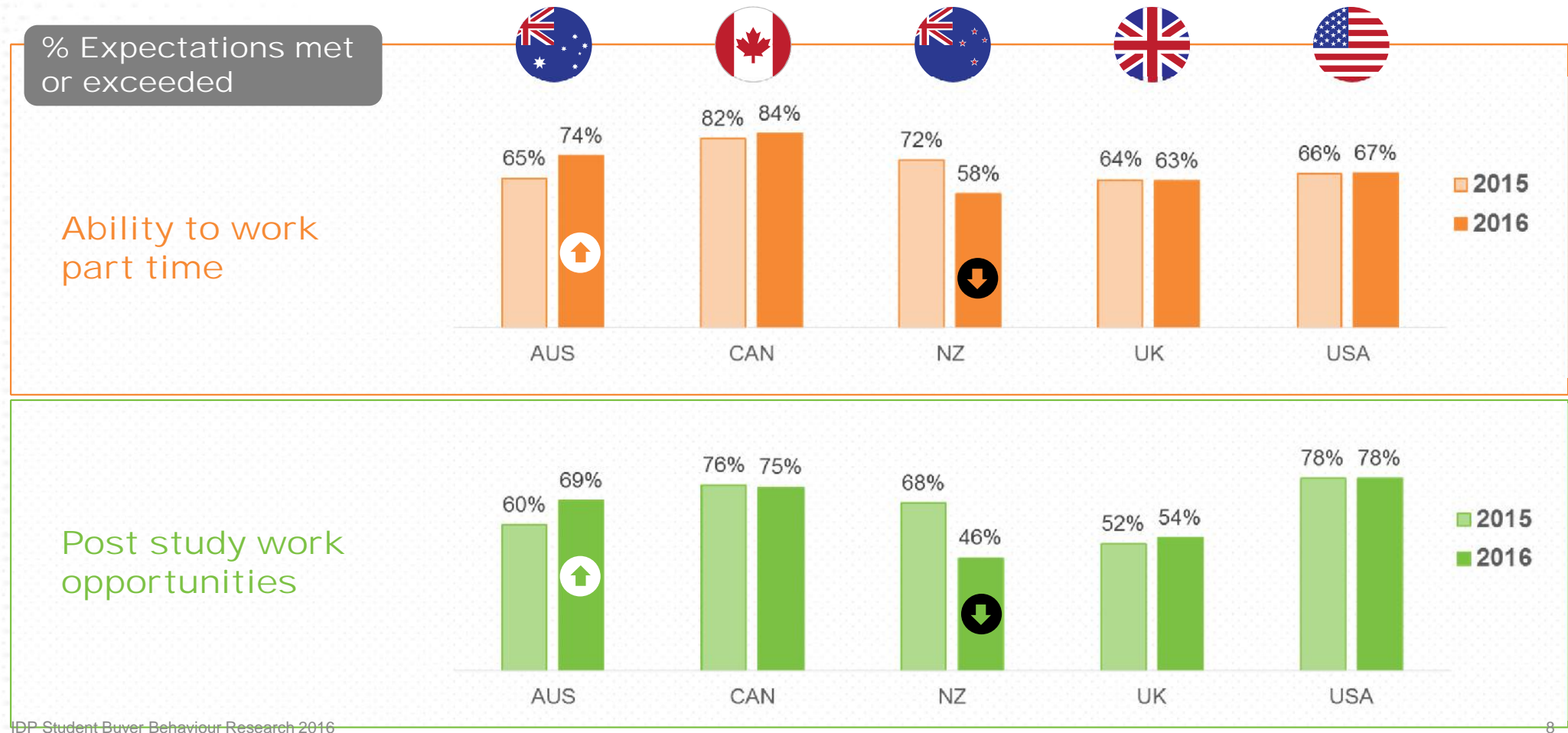
Generally, students' study abroad expectations were met, but affordability and employability remained an issue for some.

Experience with study and living abroad						
Essentials	Safety	✓	✓	✓	✓	✓
	Ease of obtaining student visa	✓	✓	✓	✓	✓
	Affordability of studying abroad	✗	✓	✗	✓	✗
Study experience	Location of institution	✓	✓	✓	✓	✓
	Quality of education	✓	✓	✓	✓	✓
	Ability to improve EL skills	✓	✓	✓	✓	✓
	Lifestyle	✓	✓	✓	✓	✓
Life benefits	Ability to work part time	✗	✓	✗	✗	✗
	Post study work opportunities	✗	✗	✗	✗	✗

 Meeting expectations
  Not meeting expectations

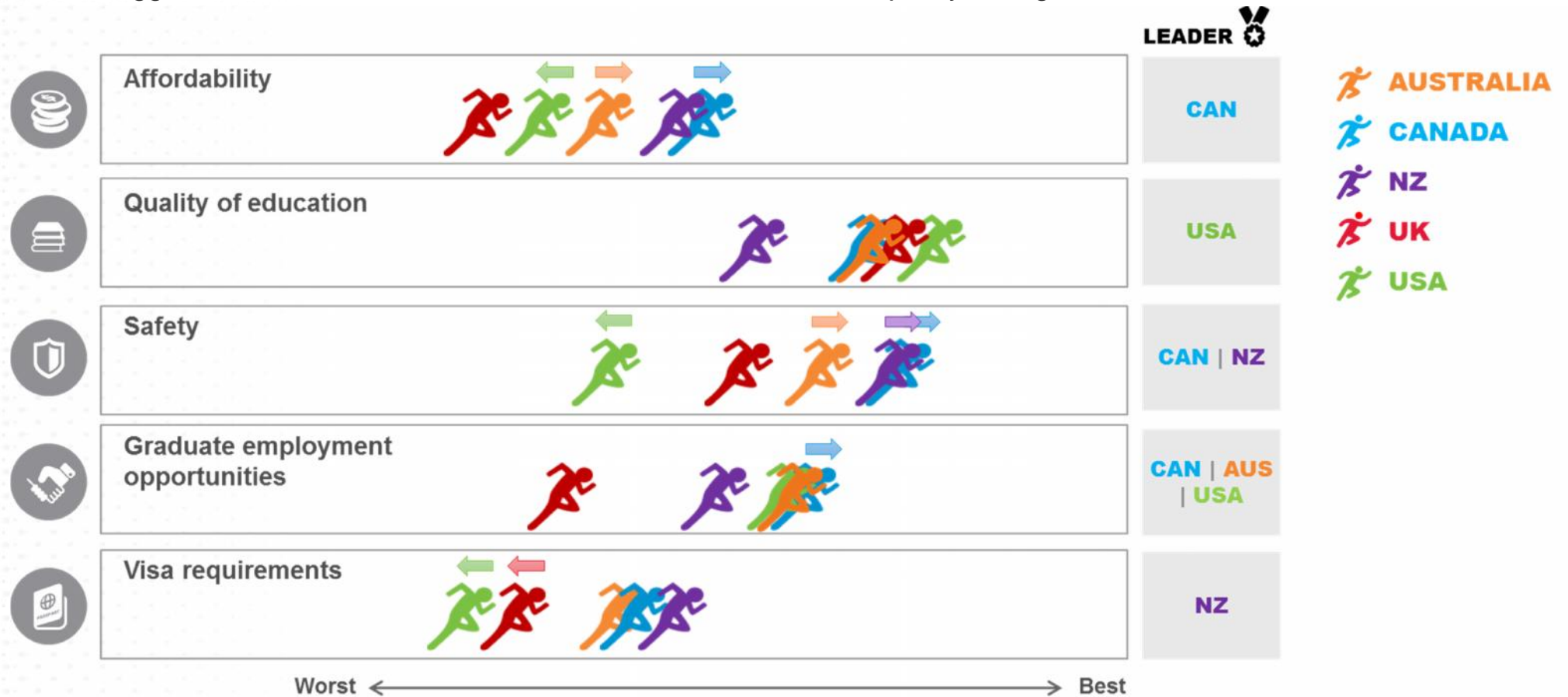
## During & post study work opportunities: Changes in meeting expectations

This year more students in Australia said their expectations were met around employability.  
Less New Zealand students said their expectations were met.



# IDP student perceptions 2016: Overall

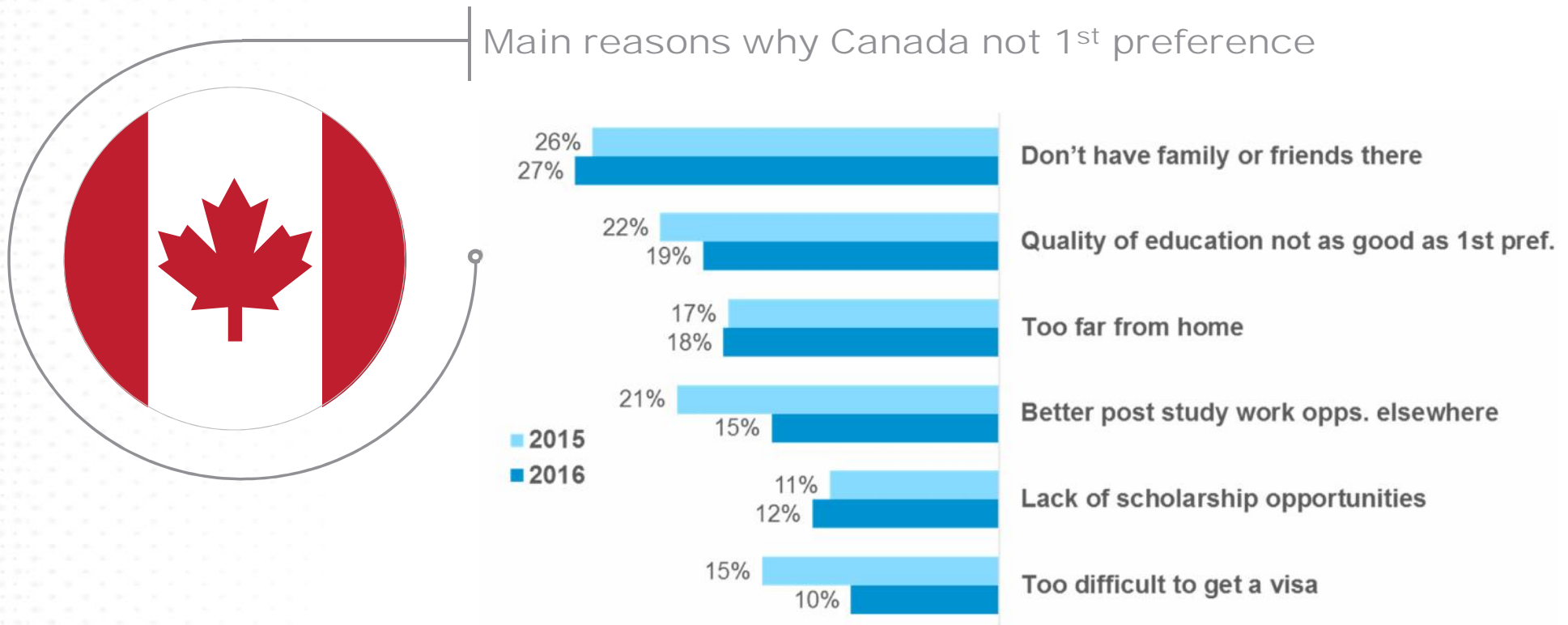
Shifts in IDP student perceptions of five of the main English speaking destinations against key drivers of choice suggested students can be sensitive to macro-economic and policy changes.





# Main reasons why destination not 1<sup>st</sup> preference

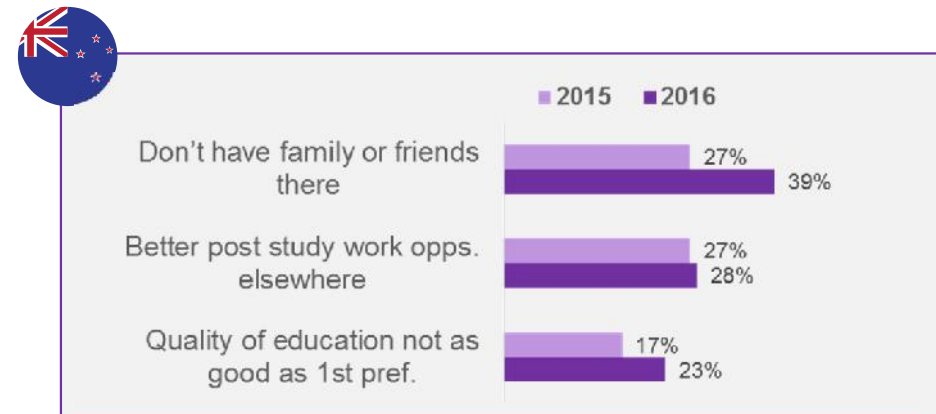
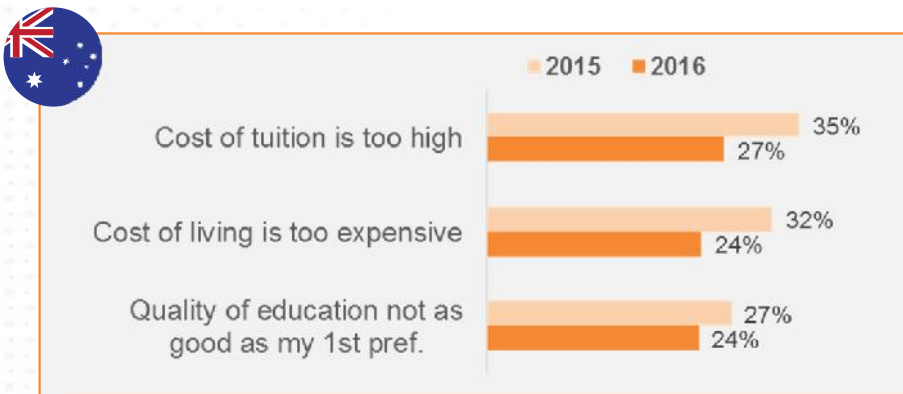
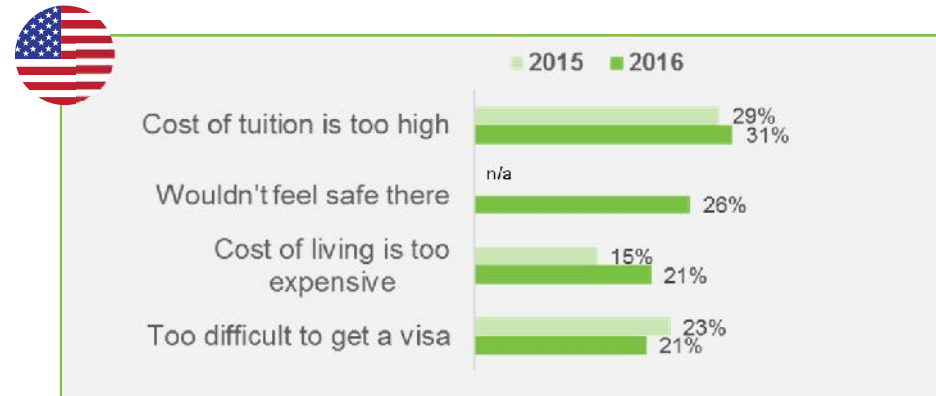
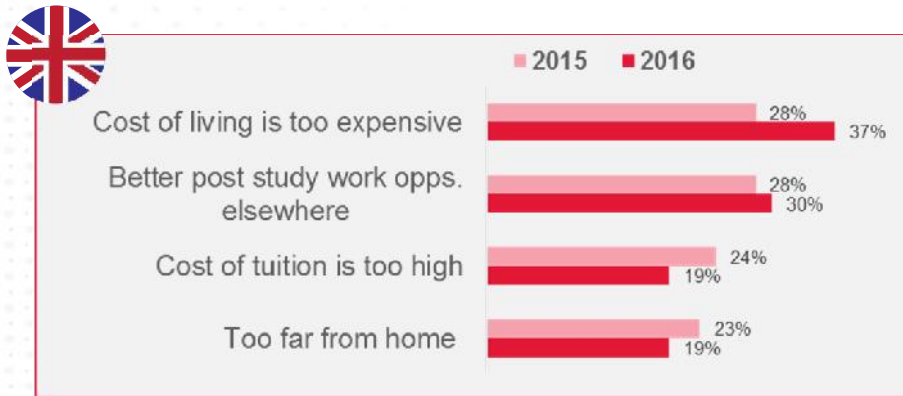
A lack of personal networks remained the main reason for not choosing Canada as a preferred study destination. This year saw less mentions around post study work opportunities as a reason for non-preference.





# Main reasons why destination not 1<sup>st</sup> preference

New Zealand was also seen to have fewer existing family and friendship networks. For other destinations, study or living costs were seen as barriers.

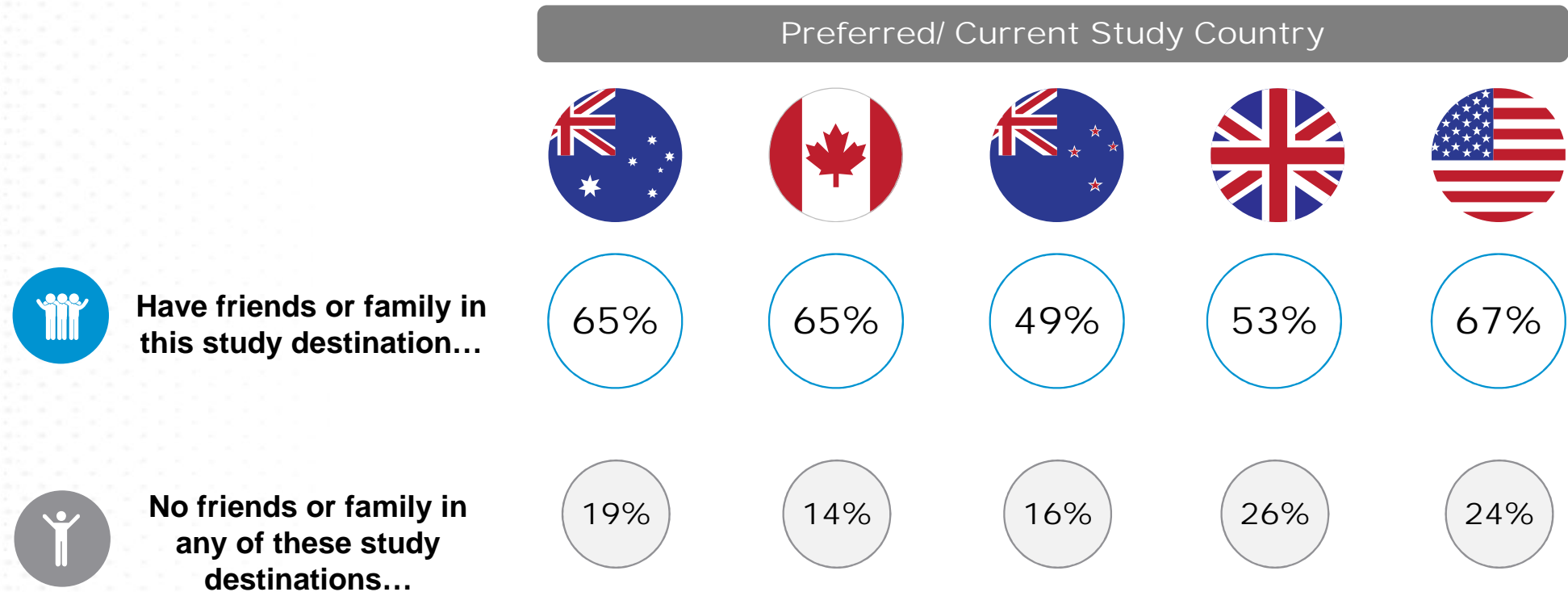


# IDP students' social connections



# Tribal connections in the study destinations

Most students had existing friendships or family networks living in at least one of the 5 study destinations.



# Tribal connections in Canada

- Direct relatives had the strongest influence on students' destination choice.



65% of Canada-bound students have friends or family abroad in Canada



Who is living in  
Canada



Spoke to them about  
life in Canada



Strong influence\*  
on decision to  
study in Canada

	Who is living in Canada	Spoke to them about life in Canada	Strong influence* on decision to study in Canada
Friends / peers of a similar age group	58%	93%	30%
Direct relatives (siblings, cousin, aunt, uncle)	48%	96%	41%
Friends of the family/elders	36%	95%	35%

















\* % strong influence = those rating 8 or higher out of 10 on a scale from 0 to 10

# The importance of city



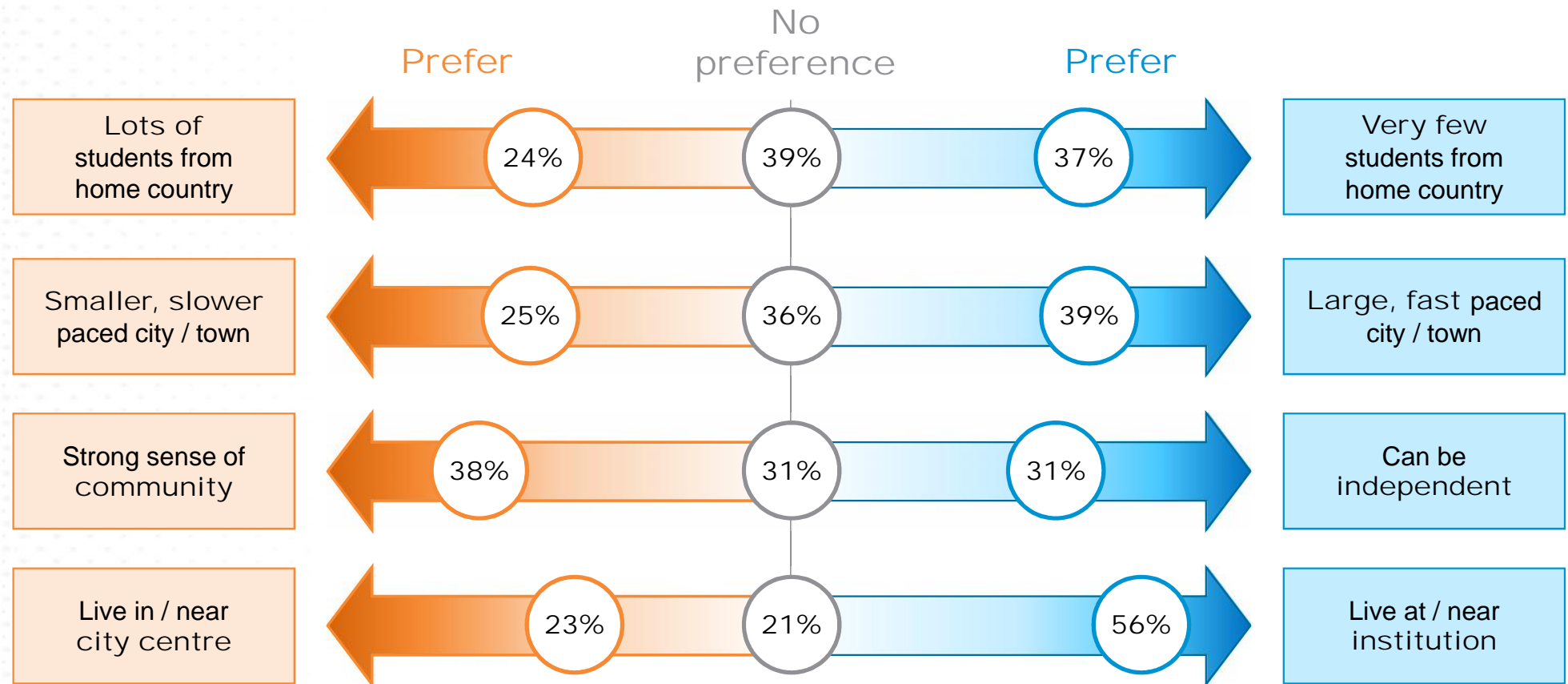
# Top reasons for choice of city of study

The location of the institution was the main reason for their choice of study city. A safe, multicultural and affordable environment was also appealing to students choosing cities in Canada.

Rank	 <b>Canada-bound students: reasons for choosing their city of study</b>	<b>Other study countries compared to CAN</b>
1	<b>Institution of choice located there</b> 53%	 
=2	<b>Safe city</b> 35%	
=2	<b>Multicultural</b> 35%	 
=2	<b>Affordable to live and study</b> 35%	  
3	<b>Availability of part-time work</b> 28%	  
4	<b>Attractive climate</b> 22%	 
5	<b>Modern/progressive</b> 19%	
6	<b>Family or friends live there</b> 15%	  

# Preferences of an ideal study city

Student preferences across different factors of an ideal city were evenly spread.  
Generally, students showed a stronger preference to be living at or near their institution.





# Communications



## Institution imagery

### Leafy campus



vs.

### Modern city



Images: IDP

Reference: Three and a Tree - 160over90's book for higher education marketers

IDP Student Buyer Behaviour Research 2016

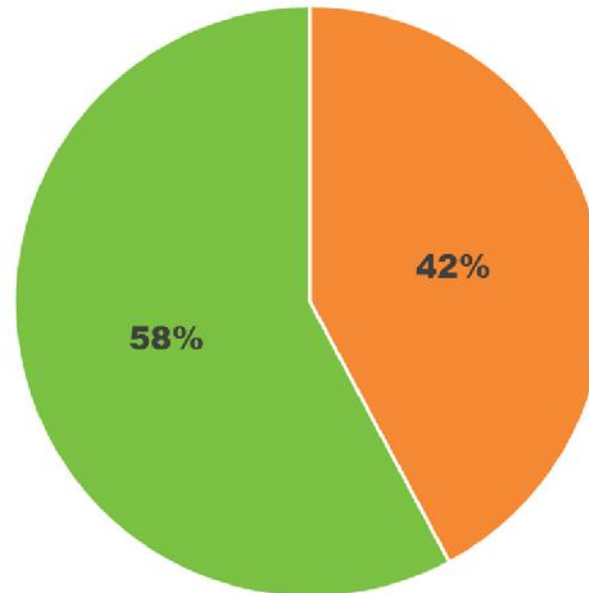
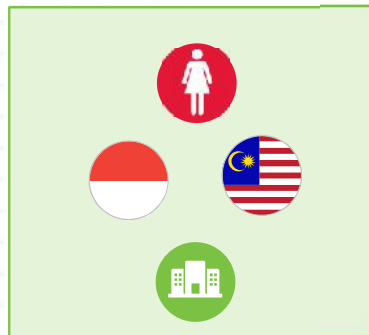
# The most preferred image is...

'Leafy' campus photos might be cliché, but were still the more popular with students overall.

## Leafy campus vs. Modern city



MORE appealing to



MORE appealing to



Images: IDP

IDP Student Buyer Behaviour Research 2016

# Current vs future 'self' images

Student

Corporate

Profession



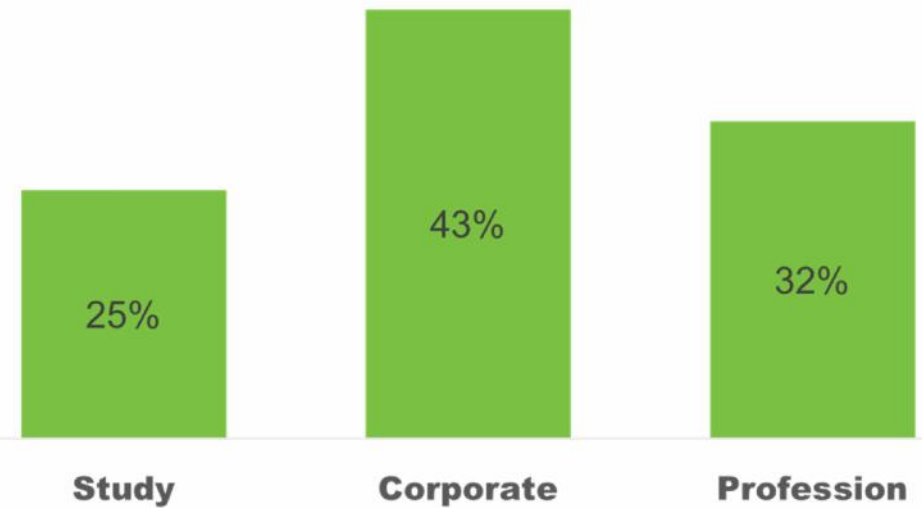
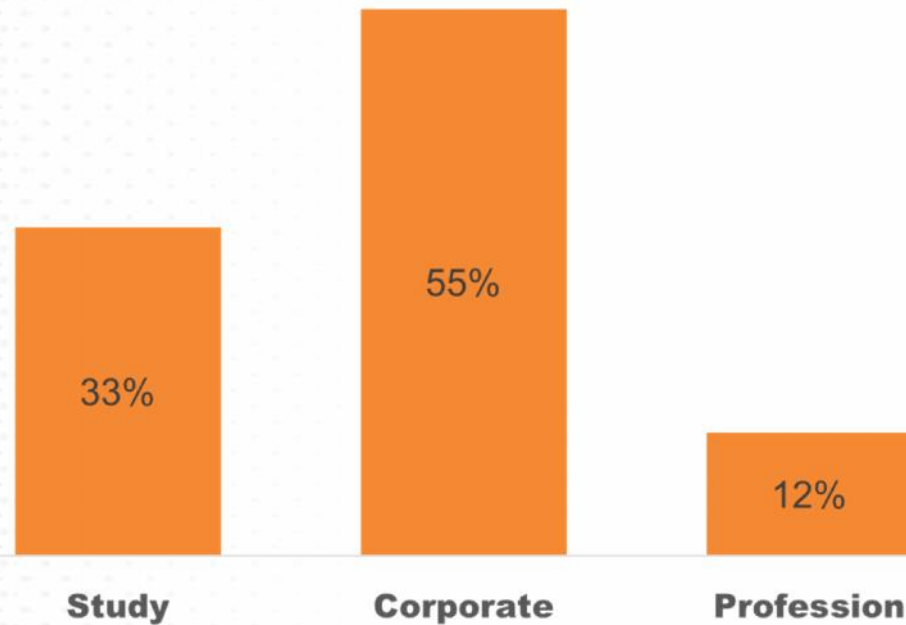
Images: IDP

IDP Student Buyer Behaviour Research 2016



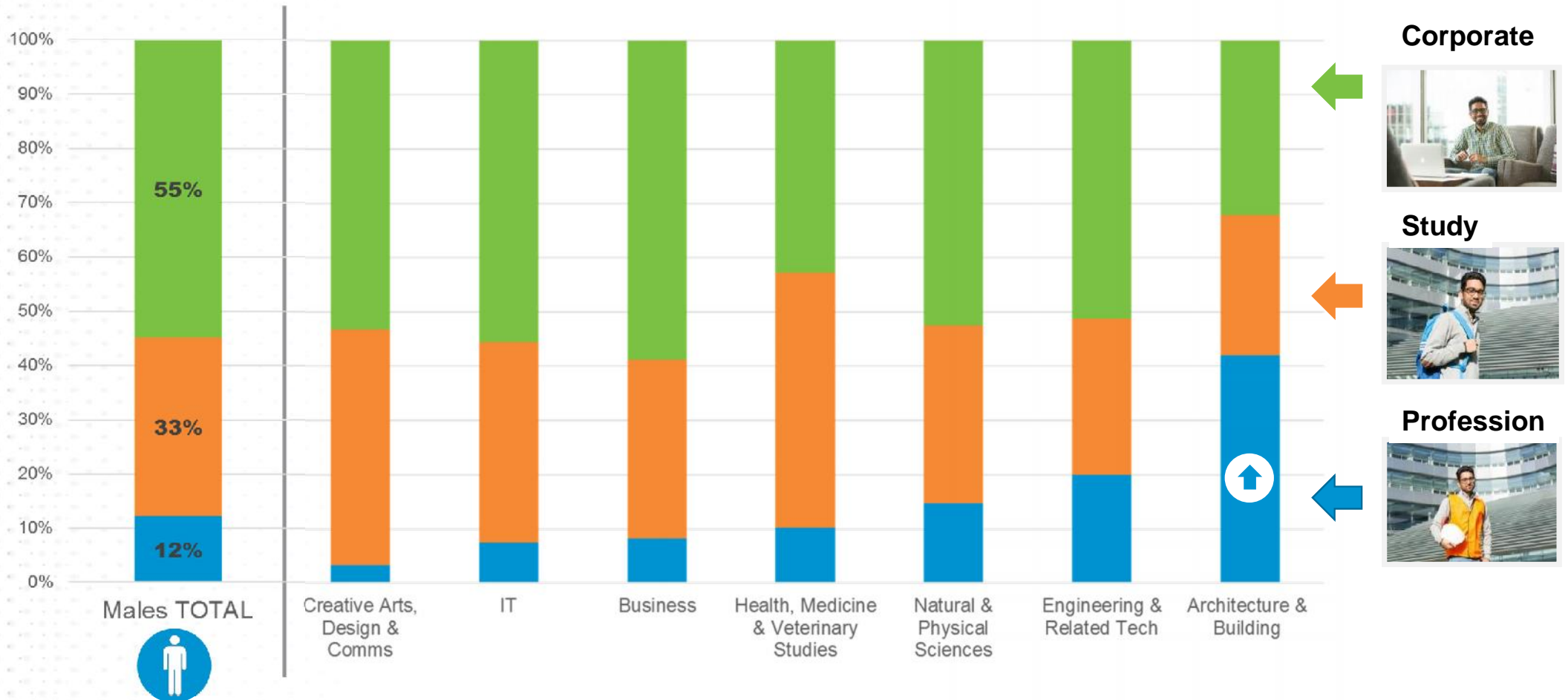
# Current vs future 'self' images: Most appealing

The 'corporate' image was broadly more appealing to both genders.



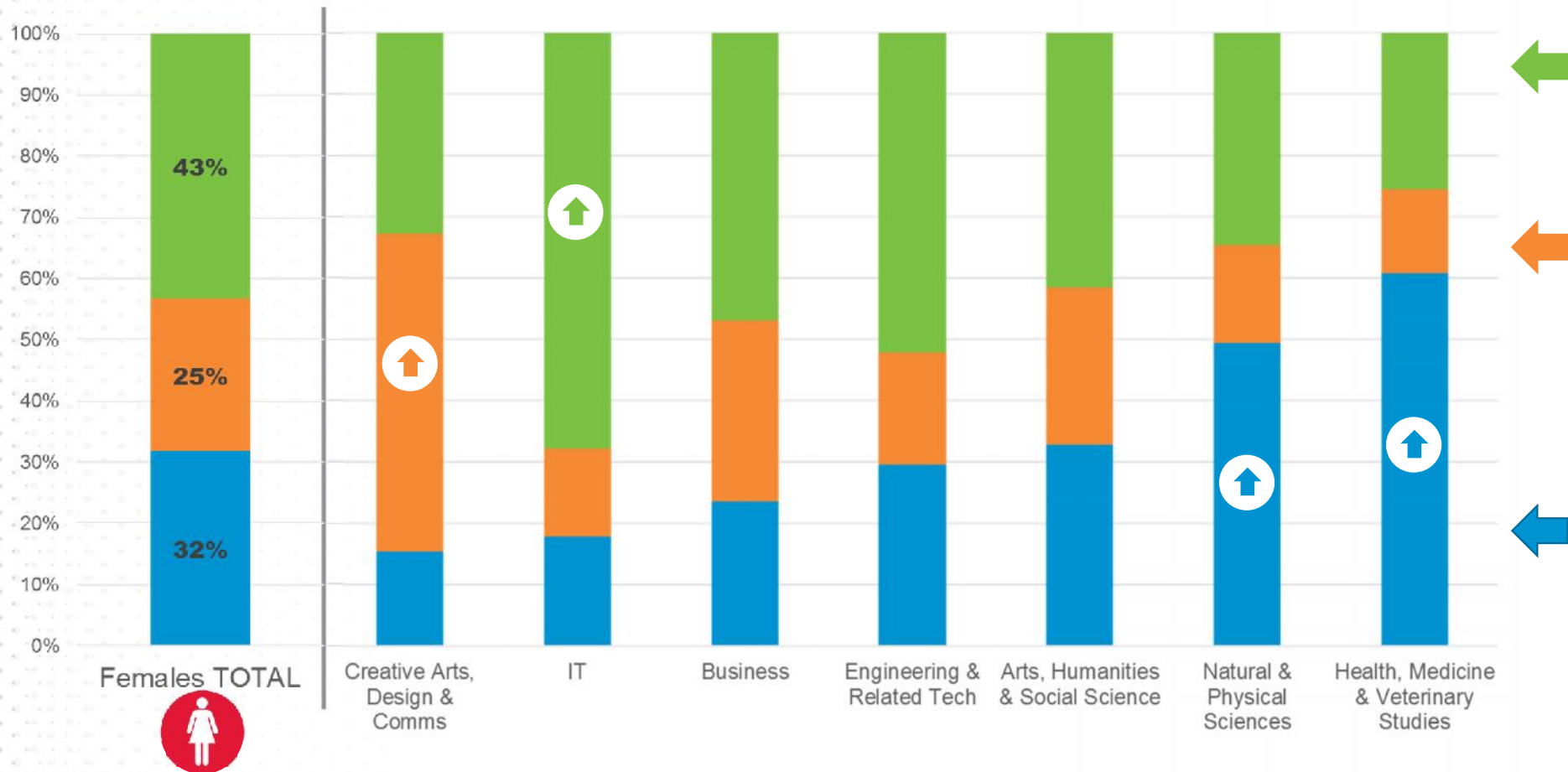
# Current vs future 'self' images: Most appealing (Males)

Male students studying Architecture & Building said the 'profession' image was more appealing.



# Current vs future 'self' images: Most appealing (Females)

Preferred images for females differed by broad field of study



**Corporate**



**Study**



**Profession**





# Summary

- Reassurance in times of global uncertainty
- Canada strengthens its perception as an affordable and safe study destination with positive graduate work opportunities
- Optimise referrals via existing onshore cultural connections
- Leverage city and institutional relationships
- Personalised marketing is both necessary and complex





For further information contact  
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or visit [idp.com/global](http://idp.com/global)