

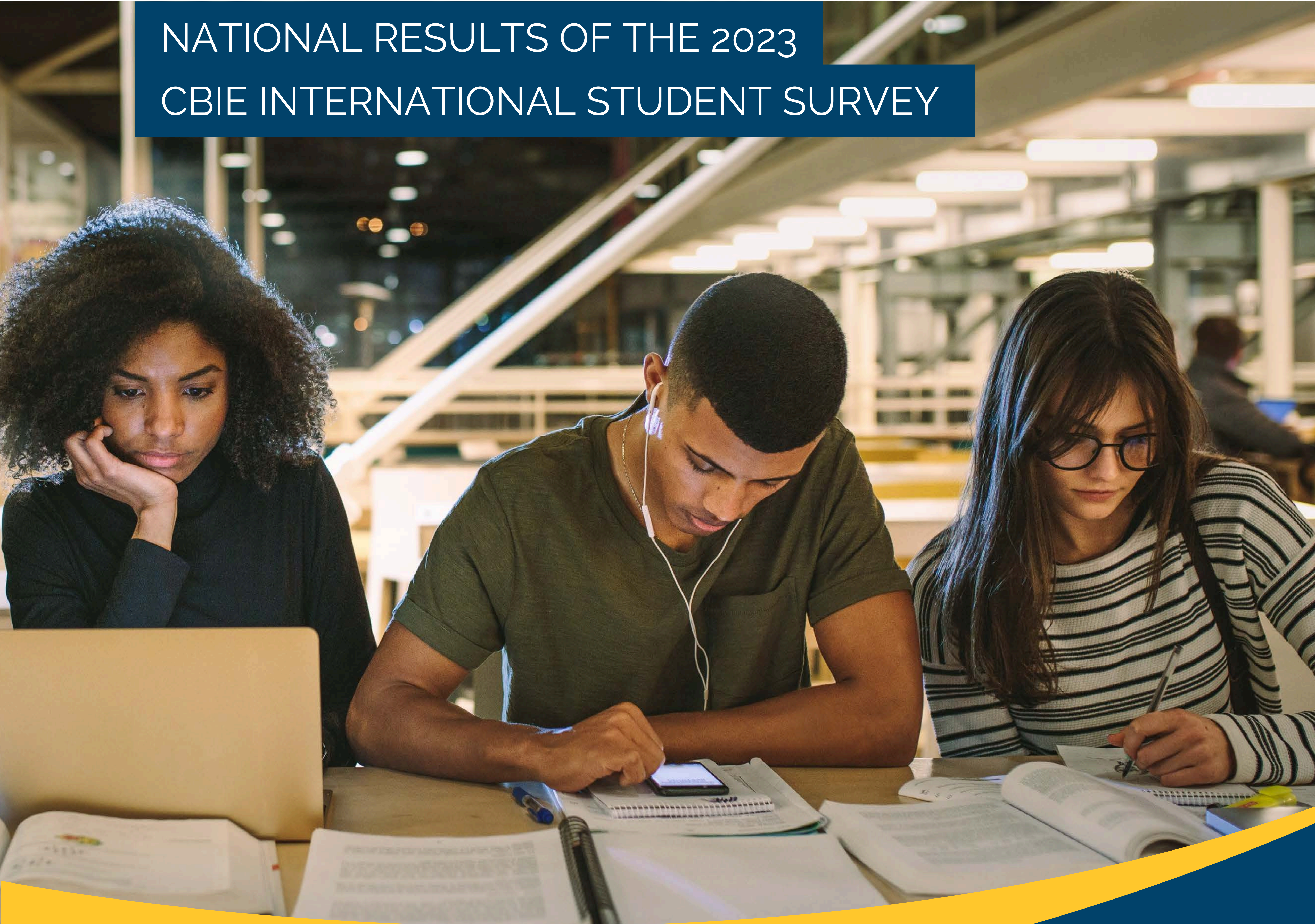


Canadian Bureau for
International Education



The Student Voice

NATIONAL RESULTS OF THE 2023
CBIE INTERNATIONAL STUDENT SURVEY





The Canadian Bureau for International Education

The Canadian Bureau for International Education (CBIE) is a global leader in international education, dedicated to equity, quality, inclusiveness, and partnership. CBIE is the national voice advancing Canadian international education by creating and mobilizing expertise, knowledge, opportunity, and leadership.

CBIE's pan-Canadian membership comprises all levels of education, including school boards, CEGEPs, colleges, institutes, language schools, polytechnics, and universities, which enroll almost two million students from coast to coast to coast. CBIE's activities comprise advocacy, research, training programs, scholarship management, and engaging in cooperative projects in capacity building, institutional strengthening, and human resource development.

This report, prepared by CBIE, summarizes the results of the 2023 International Student Survey, which was administered in collaboration with CBIE's participating member institutions.

Acknowledgements

CBIE wishes to acknowledge the joint efforts of our 79 institutional partners and their exceptional work in administering the 2023 survey. We would also like to thank the 32,500+ students who provided their 'voice' for this comprehensive report. The wide-ranging participation of institutions across Canada highlights the sector's commitment to continuously enhancing the study experience of international students in Canada. An initiative of this scale is made possible through the collaboration of many individuals, including the dedicated efforts of our team. We would like to recognize and thank our colleagues Melissa Payne, Melissa Toupin-Laforge, Joanny Bélair, and Michel Amar for their initiative and significant contributions to this report.

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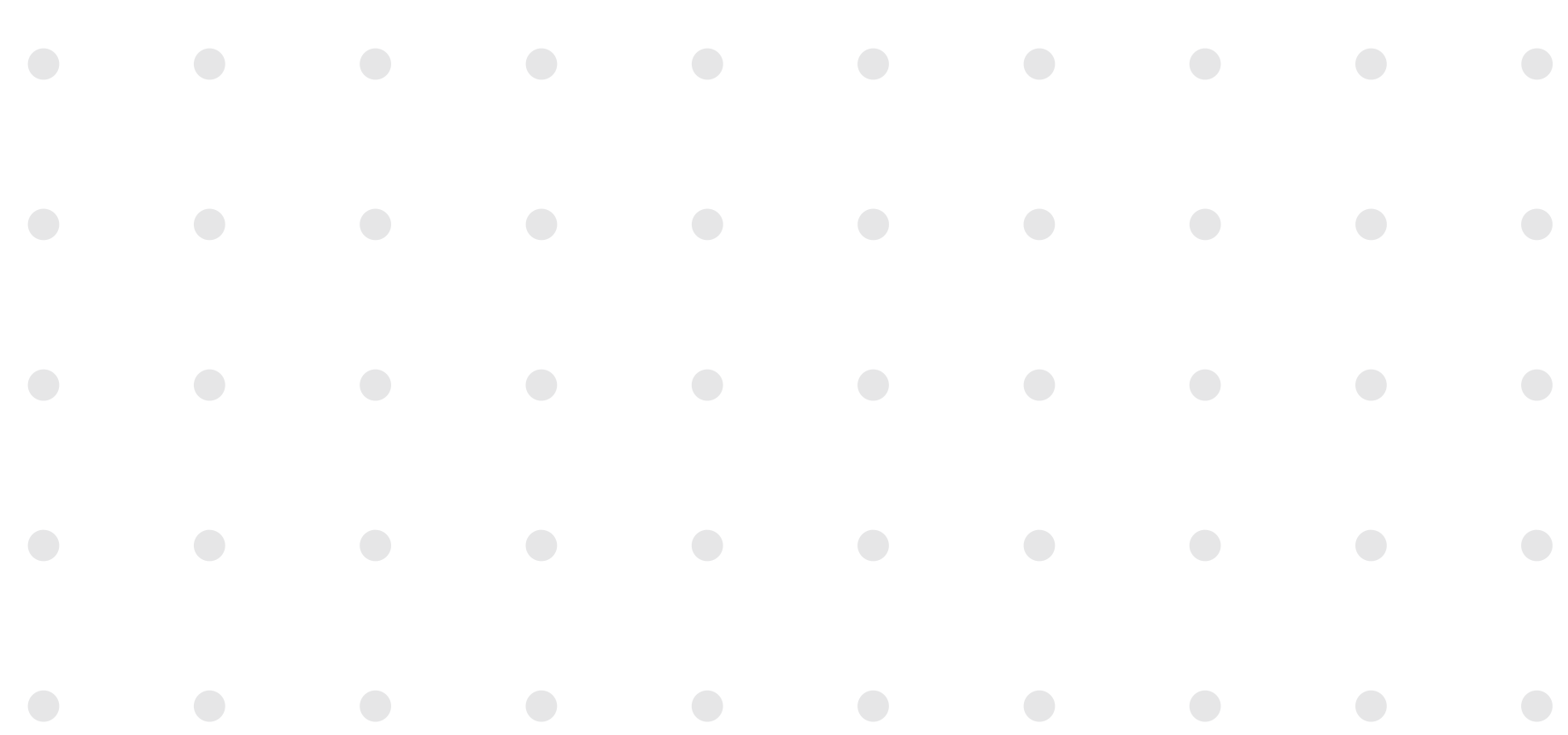


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Introduction

A time for action in Canada's international education field

Today, international education (IE) in Canada is at a crossroads. On the one hand, encouraging numbers point to growth and the positive impact of IE. The post-COVID surge in applications for study in Canada continues unabated, and the overall number of international students enrolled in Canadian institutions has reached a record 1,040,985. Updated estimates suggest Canada's international education sector now contributes more than \$30 billion annually to the Canadian economy while accounting for over 240,000 jobs.¹ Of the 2023 survey respondents, almost 60% of these young, Canadian-trained students report being interested in pursuing Canadian citizenship after completing their studies.

On the other hand, serious questions have been raised about Canada's capacity to absorb ever-increasing numbers of international students. This concern is in response to the increasingly acute national housing crisis and chronic health care shortages. Furthermore, alarming stories have proliferated about international students being victimized by unscrupulous education agents, experiencing personal, academic and economic hardship in Canada, and being underemployed and underappreciated by Canadian businesses.

Encouragingly, overall, we see that Canada continues to hold a reputation of being a destination of choice for international students pursuing a high-quality international education experience in a safe and welcoming environment.

At the time of this report, the Government of Canada had implemented several new policy measures to address the issues outlined above, with additional measures being contemplated. While the full impact of these measures has not yet been fully realized, three things are clear. Firstly, they will reduce overall international student enrolment levels (at least temporarily). Secondly, they will clarify the lines of accountability for ensuring a quality international education experience for students who choose to study in Canada. Thirdly, unless they are informed by hard evidence and calibrated through an inclusive process of dialogue and engagement with Canada's international education community, they risk diminishing Canada's future prosperity and global reputation.

¹ Immigration, R. a. C. C. (2024, May 24). IRCC Deputy Minister Transition Binder 2024 – International Students. Canada.ca. <https://www.canada.ca/en/immigration-refugees-citizenship/corporate/transparency/transition-binders/deputy-minister-2024/international-students.html>

There are critical questions that need to be asked to drive thoughtful policy responses. What is a sustainable level of international student enrolment for Canada going forward? Who will make this determination—how and when? What constitutes ethical international education practices? How will accountability for addressing key concerns be assigned in a sector where multiple actors have specific—as well as complementary—contributions to make? What institutional mechanisms are needed to bring these actors together in a sustained way to make evidence-informed decisions in a sector so vital to Canada's future?

If we don't have clear answers to these questions, the essential society-wide consensus that supported the growth of international student enrolment in Canada will unravel. The loss to Canada would be inestimable. Clearly, this must not be allowed to happen.

As the only Canadian organization dedicated to international education across all levels and sectors, the Canadian Bureau for International Education (CBIE) is committed to leveraging its unique role to build a national body of evidence that supports informed decision-making for Canada's IE sector.

I am therefore pleased to share the key findings from the most recent iteration of the CBIE International Student Survey (ISS).

This year, 79 institutions from across the country participated in our biennial survey, and over 32,500 international students took the time to respond. This high participation demonstrates that Canada's international student population is interested in sharing their perceptions, motivations and first-hand experiences of choosing Canada as a study destination. Their responses provide an important barometer that can help practitioners and policymakers determine what is working well and what can be improved. This information is essential for ensuring that Canada delivers on its commitment to providing a high-quality educational experience to current and prospective international students. This information also gives us a starting point for answering questions about the sector's immediate and longer-term future.

As in previous iterations of the ISS, we have continued to refine our survey so that it provides participants with the best possible vehicle for articulating the challenges and opportunities that they face along the different stages of their experience, from pre-arrival planning through study and post-graduate phases.

I am proud that CBIE, in partnership with our members, can amplify the voices of international students in Canada who contribute so much to our national prosperity.



President and Chief Executive Officer
Canadian Bureau for International Education

Executive Summary

About this Survey

The 2023 iteration of the Canadian Bureau for International Education's (CBIE) International Student Survey (ISS 2023) was completed by a record 79 post-secondary institutions and over 32,500 student respondents. The 2023 ISS builds on previous research, tracking shifting attitudes by respondents across several indicators. Survey questions were developed and validated with input from international students and institutions.

It should be noted that the survey was completed against the backdrop of a post-COVID-19 surge in international enrollment in Canada. It also does not reflect recent federal measures to curb the sector's unprecedented growth. Since the impacts of this policy and political environment in flux are only partially captured in the 2023 ISS findings, the next iteration of the survey (2025) will be especially important in assessing the impacts of these changes on overall enrollment, institutional viability and post-graduation work plans and intentions.

Section 1: Respondent Overview

India, Nigeria, the People's Republic of China, the Philippines, and Iran were the top five countries that provided responses, accounting for over 50% of the total respondents. With respect to gender, more than half of the respondents (54%) self-identified as female, 44% as male, and 6% identified themselves as gender diverse.

Of respondents, 61% reported attending universities, and 39% reported attending colleges or other post-secondary institutions. Most respondents were enrolled as full-time students (97%), with 78% in their first (53%) or second (25%) year of study. Of all the respondents, one third indicated studying at the undergraduate level, 35% at the graduate level and 31% in certificates and diploma programs.

Women were slightly over-represented in bachelor programs, and under-represented in diploma, post-graduate, and post-doctoral studies.

Respondents attending universities were mostly enrolled in business-related programs, followed by engineering, computer sciences, social sciences and natural and applied sciences. Those attending colleges or other post-secondary institutions were also mostly enrolled in business-related programs, followed by computer sciences, health sciences, engineering and service-related programs (e.g. hospitality, tourism, leisure).

A quarter of respondents in the field of engineering and natural and applied sciences were enrolled in graduate programs, while most respondents in the fields of business, computer science and health sciences were enrolled in undergraduate, certificate and diploma programs.

One in five respondents reported being accompanied by either a spouse, common-law partner, children or a parent. At 34%, respondents enrolled in professional training, language programs, certificates and diplomas were the most likely to come accompanied. Among respondents who were accompanied, women (29%) were more likely than men (20%) and gender-diverse respondents (17%) to arrive with a dependent (spouse/partner, child/children, or parent/parents).

Among the top five source countries, almost two-thirds of respondents from the Philippines reported being accompanied. Respondents from Iran (38% accompanied) and Nigeria (28% accompanied) were more likely to be accompanied than those from China (14%), and India (6%). Nigerian respondents were also twice as likely as those from other sources countries to come with their parent(s).

Section 2: Motivation and Decision-Making

Canada's overall reputation as a safe and stable country continues to be cited most often among respondents as a top factor for choosing Canada as a study destination. However, when compared to previous ISS surveys, there are some notable fault lines emerging. Respondents gave sharply lower ratings to Canada as a "safe/stable country" to pursue an international education (from 79% in 2021 to 69% in 2023) and to the "quality of education" (down twenty percentage points from 2021, from 70% to 50%).

Among the top source countries for international students, Chinese and Nigerian respondents cited the value and affordability of studying in Canada as key factors, while those from the Philippines and India cited work opportunities. The most cited factor for Indian students was the ease of getting a Canadian study permit. Nigerian and French students also rated the quality of Canada's education system and gaining intercultural awareness among the top reasons.

Respondents from the Philippines and Iran also highly value the opportunity for their spouse to work and the opportunity to apply for permanent residency.

For undergraduate respondents, the four main reasons for choosing Canada were knowing someone who lived/studied in Canada, the opportunity to work while studying, the affordability of tuition costs, and the ease of getting a Canadian study permit. Respondents in graduate programs gave greater weight to the availability of financial support and opportunities for their spouse to work. Potential work opportunities for spouses was also particularly important for respondents registered in professional training, certificate, diploma, language, and post-graduate programs.

Among all respondents, the top three reasons across all programs of study for choosing their institution were the institution's program offerings, location, and reputation/rankings.

Co-op and Work-Integrated Learning (WIL) programs also received a high ranking, particularly for respondents registered in professional training, language programs, certificates, and diplomas. For respondents from Nigeria (35%) and the Philippines (44%), opportunities for co-op and WIL were decidedly more important factors in choosing to study in Canada than for those from France (12%).

In terms of the most useful resources consulted when choosing Canada as their study destination, respondents rated their host institution's website (95%) first, and websites/publications ranking universities and colleges (87%) second. The EduCanada website, government departments in respondents' home countries, and presentations, including virtual tours and events, were viewed as the least useful resources.

Overall, approximately 28% of respondents reported having received assistance from an education recruiting agent. There is considerable variance in the reported use of educational agents by student enrolment. For example, over 41% of college respondents received services from an education recruiting agent—twice the number reported for university students (20%). For post-graduate respondents, 41% identified "information from an education consultant" as one of the top reasons for choosing their institution. Variance is also important when differentiating top source countries: respondents from India (43%) and the Philippines (33%) tend to be more reliant on education recruitment agents, while those from France (5%) are the least reliant. Ninety percent of respondents who used agents expressed satisfaction with the service they received.

The majority of the respondents (80%) did not experience any difficulties with their study permit application. However, of the 18% of respondents who experienced difficulties, "processing timeliness" (70%) was cited as the most challenging part of the application, followed by meeting the eligibility requirements such as proof of financial viability.

The top three challenges encountered by respondents during or following the process of admission were finding and securing accommodations, transferring funds to the institution, and demonstrating that they held sufficient funds to be admissible to apply.

Section 3: Experience on Arrival

Respondents were satisfied with their experience on arrival in Canada, especially regarding interactions with Canadian immigration officials. However, over 20% cited dissatisfaction with moving into off-campus accommodations and more than half the respondents from the top five source countries reported issues finding and securing accommodations.

Half of respondents reported difficulties adjusting to the learning environment and completing written assignments at Canadian institutions after starting their study programs.

Section 4. Learning Experience and Campus Life

Just over 80% of all respondents indicated they were “satisfied” or “very satisfied” with their Canadian study experience. Among respondents, those from France and the Philippines were the most satisfied, with 92% indicating they were either “satisfied” or “highly satisfied”. Respondents from Iran (26%), India (20%), Nigeria (18%) and China (16%) expressed overall dissatisfaction with their Canadian study experience.

In terms of respondents' satisfaction with institutional services, there were only minor differences reported, regardless of institution type, province or territory of study, or rural or urban setting.

Despite relatively high ratings, a sizeable number of respondents reported they were “dissatisfied/very dissatisfied” with five key areas of institutional services: residence and housing, financial aid services, health services, career and employment, and WIL and experiential learning services. However, a sizeable number of respondents indicated that they either were not aware of the institutional services available to them or had not taken advantage of them.

There has been a troubling decline since the 2021 ISS in the number of respondents from all five top source countries indicating they would recommend Canada as a study destination. This is especially noteworthy for respondents from India, where positive sentiment dropped 33% between 2021 and 2023 (from 70% to 37%, respectively) and from the Philippines, where positive sentiment dropped 27% (from 82% to 55%). While this pattern does not carry over for three of the five top source countries in terms of their likelihood to recommend their institutions, scores from China and France were stable while scores from respondents from Nigeria rose 7%. There were notable declines from the Philippines (down 11% from 2021) and India (down 10% from 2021).

Section 5: Safety, Wellbeing, and Inclusion

Respondents generally agreed with statements indicating that their institution, faculty, and administration were doing an effective job acknowledging their personal and academic needs, treating them with respect and making them feel welcomed and valued. All these indicators have trended upward since the 2021 ISS.

The gender breakdown of belonging among student respondents shows only slight differences between female and male respondents. However, the stronger trend is that gender-diverse respondents report substantially less institutional belonging.

Despite these positive and improving ratings, almost one in five respondents agreed with the statement: "I have considered leaving my institution because I felt isolated or unwelcome," and a further 12% neither agreed nor disagreed with that statement.

Although respondents generally indicated high degrees of perceived safety—especially in their own accommodations, on-campus, and on online or social media platforms—they were less at ease in public spaces. Since the 2021 ISS, respondents' overall sense of reported safety declined in both public spaces (5% more insecure) and in public transport (6% more insecure).

Among all respondents, discrimination and harassment experiences were higher in off-campus locations. Some 37% of respondents from China and Iran and approximately one-quarter of respondents from India, Nigeria, and the Philippines reported having experienced discrimination.

Section 6: Working While Studying

One in five respondents ranked the possibility of working while studying among the most important factors motivating their choice of Canada as a study destination. Twelve percent of international students hold multiple jobs, with 17% reporting working between 21 and 30 hours a week and 14% working more than 31 hours a week. Relative to the 2021 ISS, the number of respondents indicating they were/are working increased by almost 10%. Among respondents who reported working, 70% deemed the extra income as being "absolutely required".

Respondents enrolled in colleges were more likely to work off-campus (89%) compared to those enrolled in universities (61%). University respondents are notably more engaged in on-campus work (29%) than their college counterparts (6%). Graduate students are also significantly more likely to be employed on-campus (39%) than undergraduate students (19%).

Among respondents who reported working, 23% were in WIL/co-op opportunities facilitated by their institutions. Enrolment in WIL/co-op programs is similar across institution types.

In terms of searching for work in Canada, respondents cited a lack of sufficient work experience (27%) and the inability to understand the expectations of Canadian employers (27%) as the top challenges. Four in ten respondents agreed with the statement that Canadian employers struggled to understand or appreciate the skills and abilities international students can bring to their businesses or organizations. Moreover, one in four also agreed with the statement that Canadian employers do not understand regulations for hiring international students and struggle with work permit applications and immigration-related challenges.

Female student respondents were more likely than males to attribute their difficulties finding work to not having enough Canadian work experience or overall work experience. In comparison, men were more likely to indicate challenges in not meeting the expectations of Canadian employers.

While respondents rated "online resources/training provided by your educational institution" as the most useful institutional support, one-half of all working respondents (and one-third of respondents in WIL or co-op programs) reported having received no institutional support in finding work.

Section 7: Post-Graduation Plans

When respondents were asked to describe their post-graduation plans, the frequently cited response was to work for up to three years in Canada and then pursue permanent residency (PR) (43%). Sixteen percent of respondents indicated that they planned to work for up to three years in Canada and then return home, while 21% planned to work for a period and then resume their studies. Eighteen percent of respondents expected to continue their studies either at another Canadian institution or at their current institution (17%).

Respondents who reported being accompanied were more likely to work for three years and then apply to become permanent residents (57%) compared to unaccompanied respondents (40%). They were also slightly less likely to continue their studies at a Canadian institution.

When looking at post-graduation intentions by the top five source countries, 73% of respondents from the Philippines reported they intended to work for three years and apply for PR. Conversely, Indian respondents were the least likely to plan to work for three years and then apply for PR (only 25% as compared to the average of 43%).

A substantial majority of respondents (70%) indicated they intended to apply for a Post-Graduate Work Permit (PGWP). At same time, 57% of respondents indicated they intended to apply for PR. This remained relatively consistent with the 2021 ISS numbers reported.

Almost all respondents from the Philippines indicated that they intended to apply for a PGWP. Interest in applying for a PGWP was also very high for respondents from Nigeria (78%), Iran (70%), India (68%), and China (62%). Respondents from France (43%) were the least interested in applying for a PGWP, respondents from the Philippines were the most likely (84%) to pursue permanent residency in Canada after completing their studies.

Across all levels of study, Ontario (33%), British Columbia (20%) and Quebec (9%) were the provinces where most respondents indicated they planned to live after obtaining their PR.



About This Survey

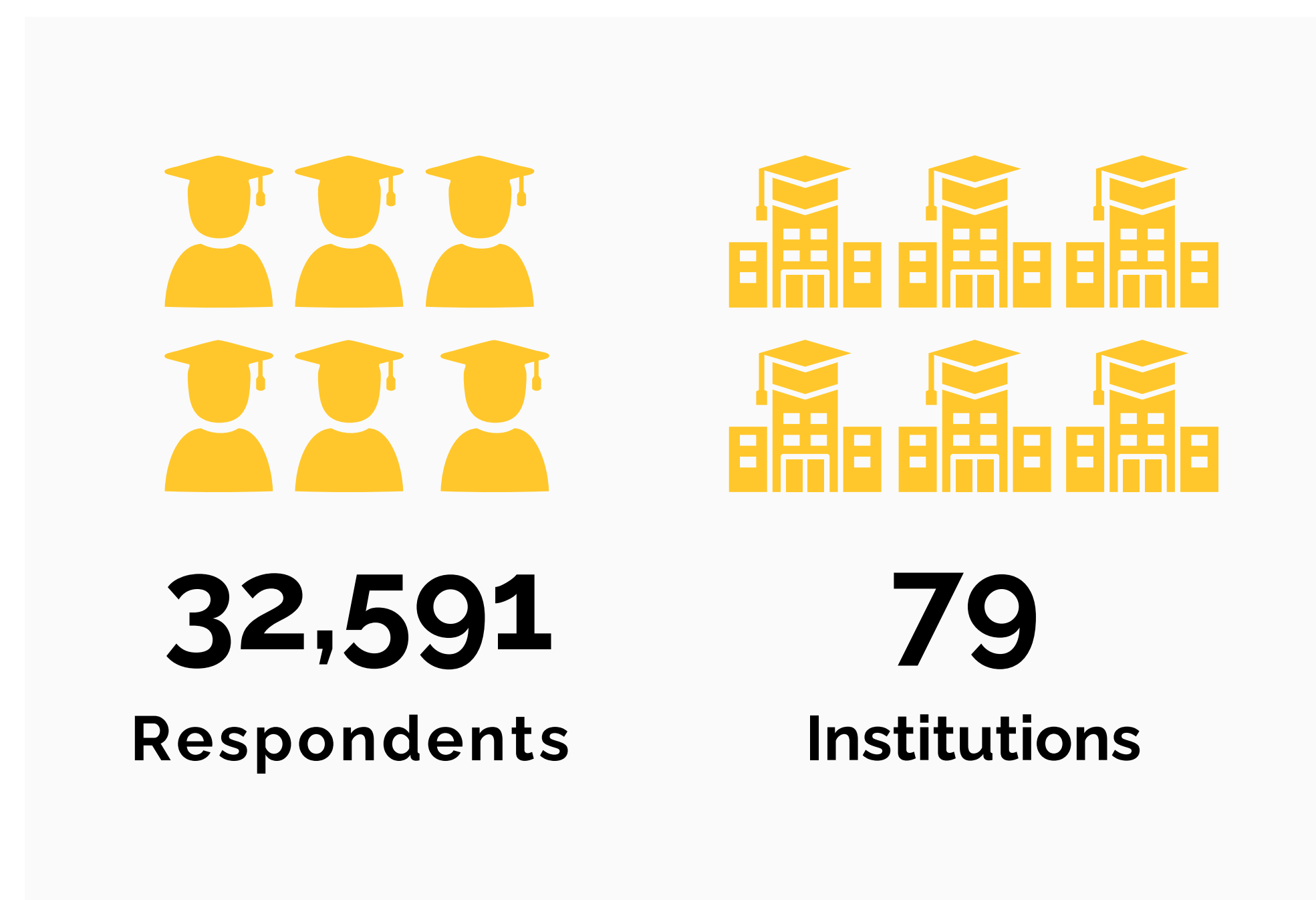
Since the first iteration of the CBIE International Student Survey (ISS), the overall number of participating institutions and international students has continued to trend upward. The number of institutions participating in the survey rose from 67 in 2021, to 79 for the current survey, with 32,591 international students taking part.

This consistently high individual and institutional response rate underscores two things. First, it shows the interest of Canada's international education community in making its voice heard and participating in the growing public discourse on how to ensure Canada meets the needs and expectations of inbound students. This desire also benefits the institutions and communities that host them and advances broader pan-Canadian economic and demographic objectives. Second, it proves the value of the ISS itself as a resource to support evidence-informed decisions on international education programming by institutions and all levels of government in Canada.

This 2023 iteration of the ISS sheds light on current and emerging issues affecting a sector whose unprecedented growth over the past decade reflects both the enduring strength of Canada's reputation as a destination of choice for global student talent and the increasingly urgent need to address concerns about the quality, relevance and sustainability of current international education policies and practices.

Recent decisions by the federal government affecting international student enrollment underscore how increasingly fraught the policy landscape is. These decisions, held against the backdrop of a post-COVID surge in international student enrollment in Canada, include the following: new requirements for prospective students to demonstrate financial resilience; more restrictive options for working part-time while studying; pressure on Designated Learning Institutions (DLIs) to crack down on "bad actors" in the sector; and, a two-year cap on enrollment levels to provide time to develop criteria for defining baseline capacity by institutions and host communities to ensure that enrollment levels are sustainable.

Using the baseline information from this current survey, future iterations of the ISS will let us track the sector's continued evolution and the impacts and consequences of these measures for international students and host institutions.



Survey Methodology

The current survey builds on questions and queries from previous iterations of ISS to track shifting attitudes by respondents across many indicators. This longitudinal data is crucial for assessing Canada's overall performance in maintaining an effective and resilient international education sector. It is also very important because it helps decision-makers determine where and how to focus future initiatives. The survey also includes some additional qualitative questions to provide a deeper insight into some of the sector's post-COVID performance issues—especially regarding mental health, student well-being and access to accommodations.

It should be noted that the survey period—the fall of 2023—coincided with a significant post-COVID surge in international student enrollment, the emergence of affordable housing as a salient political issue, ongoing concerns about access to health care services, and high-profile media coverage as well as a Senate report on at-risk international students. These developments have resulted in growing public restiveness regarding overall immigration levels and the concomitant federal decisions to slow international enrollment levels. The impacts of this increasingly volatile policy position and political environment are only partially captured in the ISS 2023 findings.

Notes on the Data

Overall, the more robust survey response rate by international students and host institutions proves the value of the ISS as a decision-support tool for policymakers. That said, a few caveats apply regarding its predictive value. For example, while COVID-19 accelerated the frequency and sophistication of “remote learning”, the full and enduring effects of this phenomenon on institutions and international students are still being evaluated.

The initial data gathered for the 2021 ISS and the follow-up data gathered for the 2023 ISS are instructive, but the broader consequences of these developments have yet to be fully assessed.

Other important shifts to consider when analyzing longitudinal data include enrollment patterns by source country; whether a student is accompanied by a spouse, common-law partner, child or parent; program of study; type of institution; and location.

Similarly, the continued concentration of international student enrollment in larger urban centres in Ontario, Quebec and British Columbia—and the resulting issues that result—is framing the current public debate over the sustainability of international education. Some smaller provinces have expressed concern that their programs (and program reputations) are suffering from actions being taken to curb enrollment in larger, over-saturated markets. Differences between the international student experience in rural versus urban institutions, and in jurisdictions where access to affordable student accommodations is less-problematic should also factor into any interpretation of these findings. In each section of this report, salient trends and distinctions have been highlighted, and, where appropriate, deeper analysis was conducted into issues that surfaced.

Finally, it should be noted that 22% of respondents were from India, Canada's largest source country for international students. Where appropriate, in presenting these findings, differences in results have been noted by source country. However, in instances where the aggregated data is presented (e.g., motivation to study in Canada or to pursue a PGWP after graduation), it is important to keep in mind the over-representation of respondents from India.

Section 1

Respondent Overview

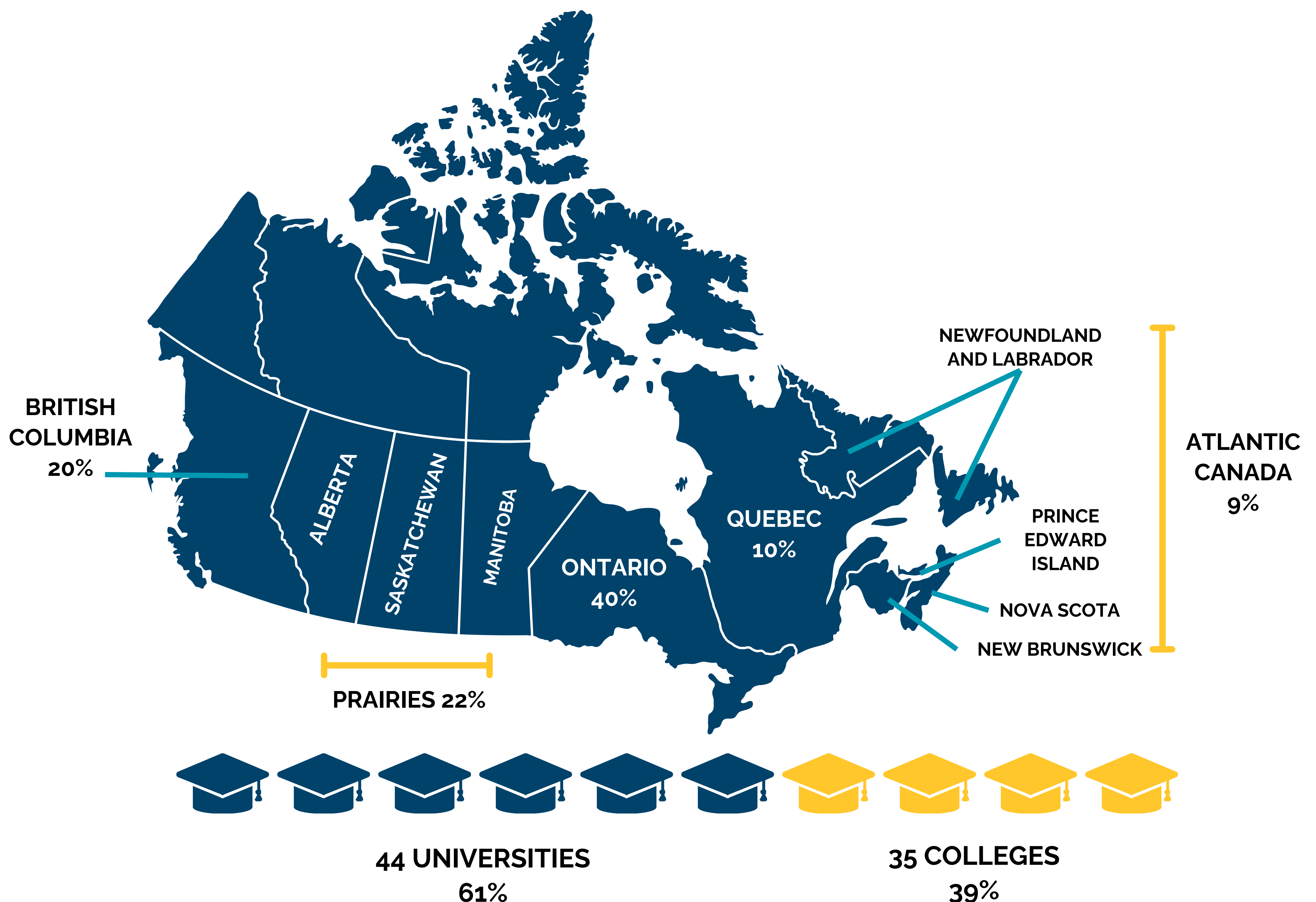
1.1 INSTITUTIONAL PARTICIPATION

The institutions that participated in the 2023 International Student Survey (ISS) were diverse and representative of the Canadian post-secondary landscape. As a national body, CBIE strives for regional and linguistic representation in every data sampling exercise.

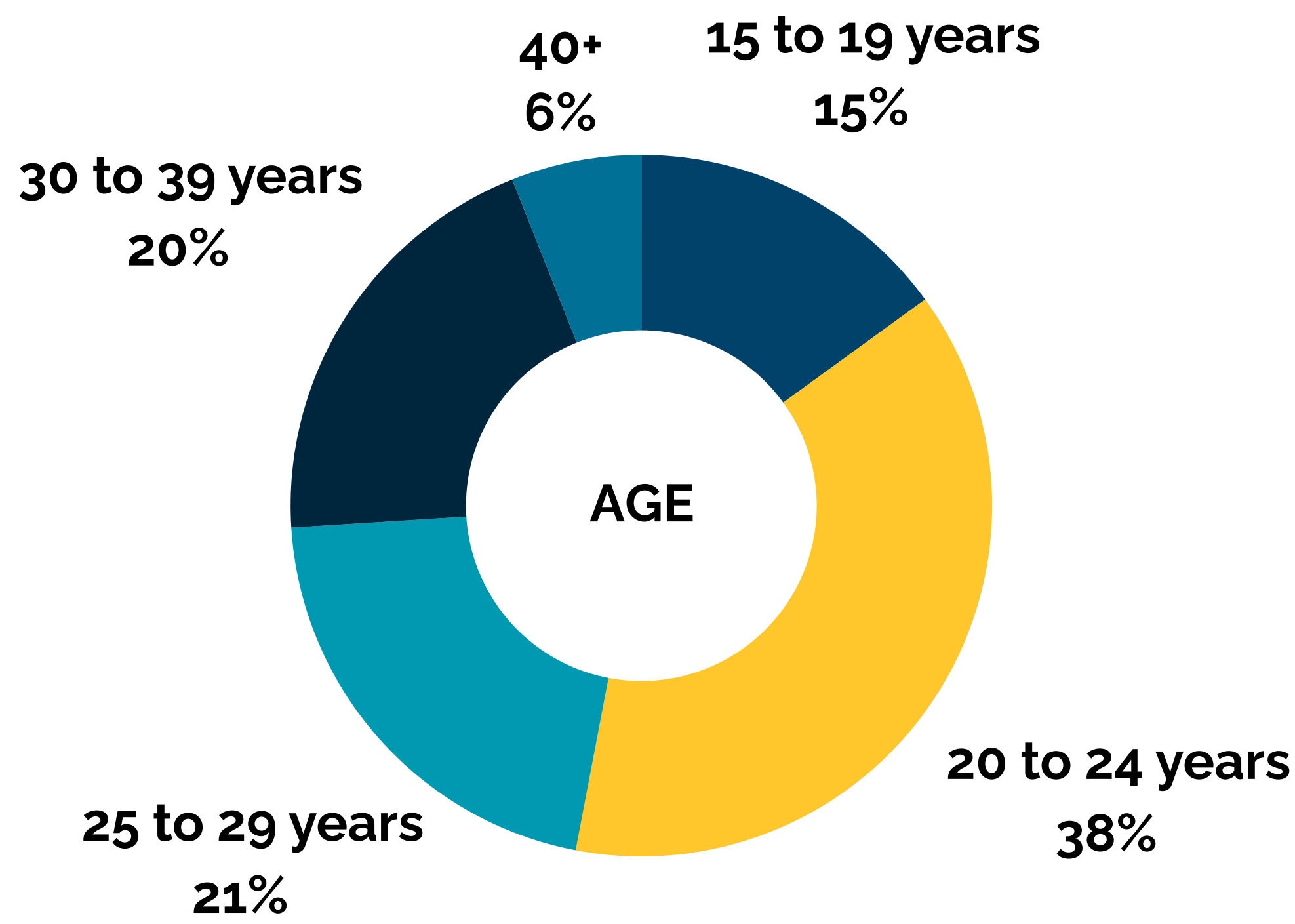
As with previous ISS iterations, and consistent with overall international student enrolment patterns, most respondents were from Ontario (40%), British Columbia (20%) and Quebec (10%).

Over 10% of respondents completed the survey in French.

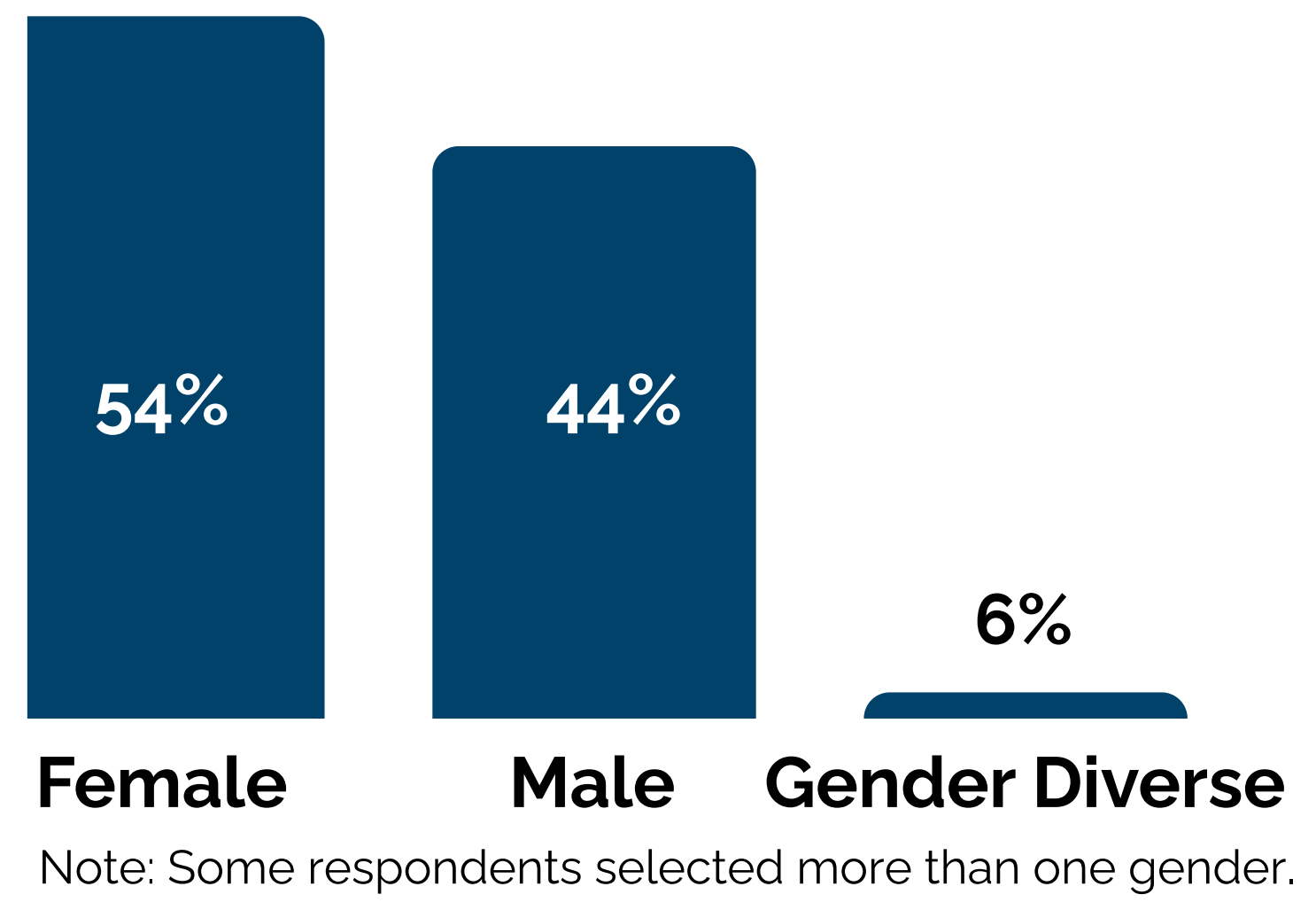
Participation by colleges, polytechnics and institutes increased to over 40% for the 2023 survey. Therefore, from this point on in this report, references to colleges are broadly understood to also include polytechnics and institutes.



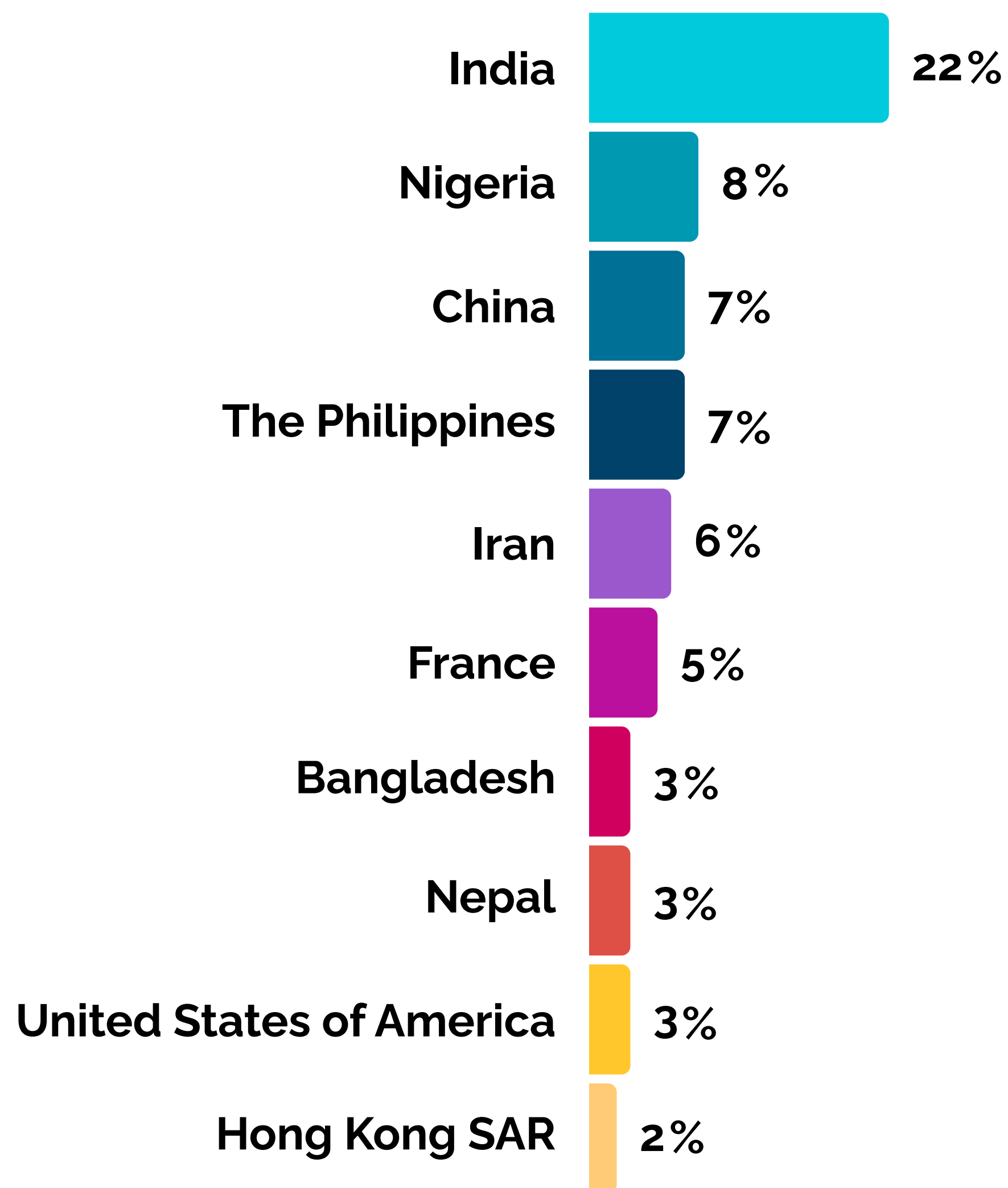
1.2 RESPONDENT DEMOGRAPHIC PROFILE



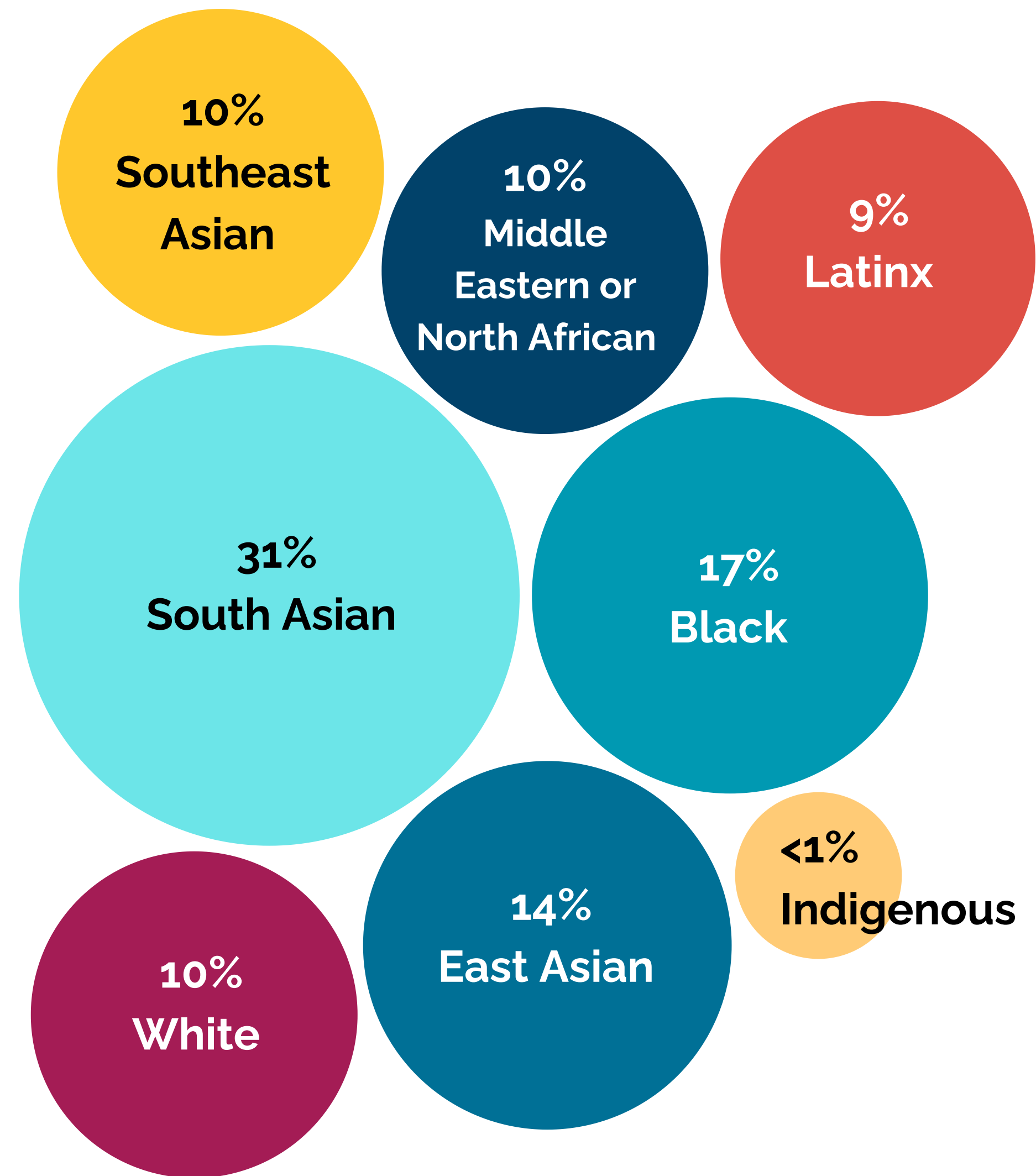
GENDER



TOP COUNTRIES



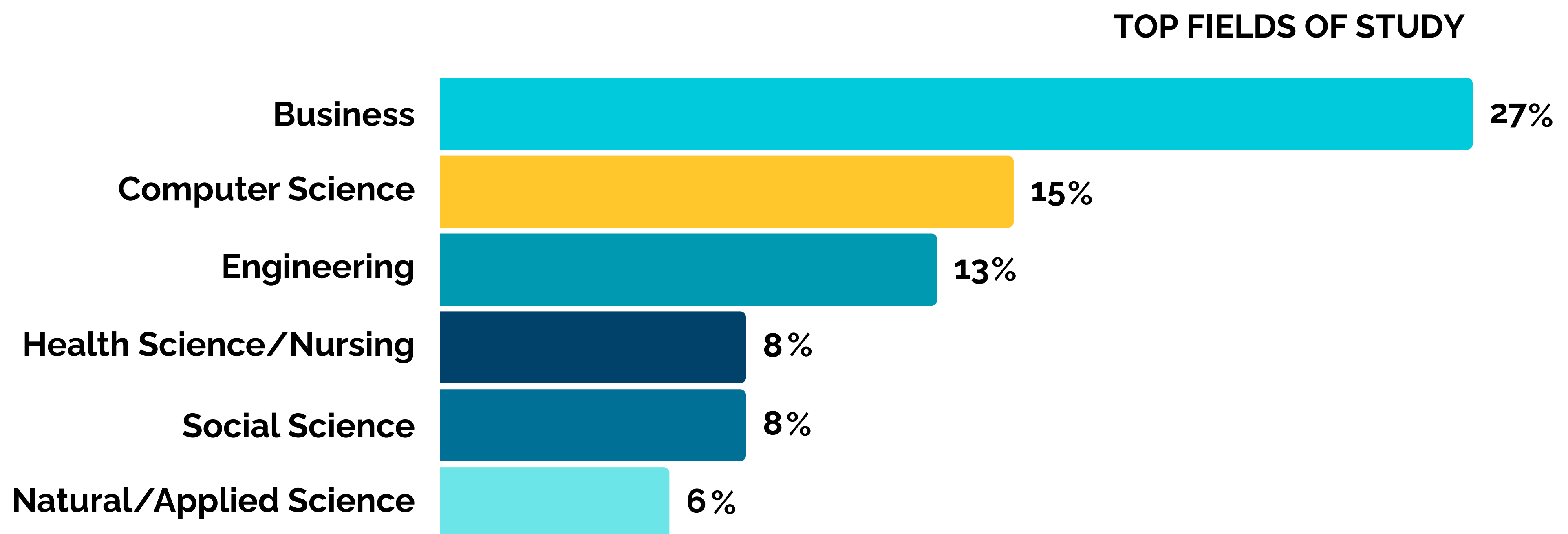
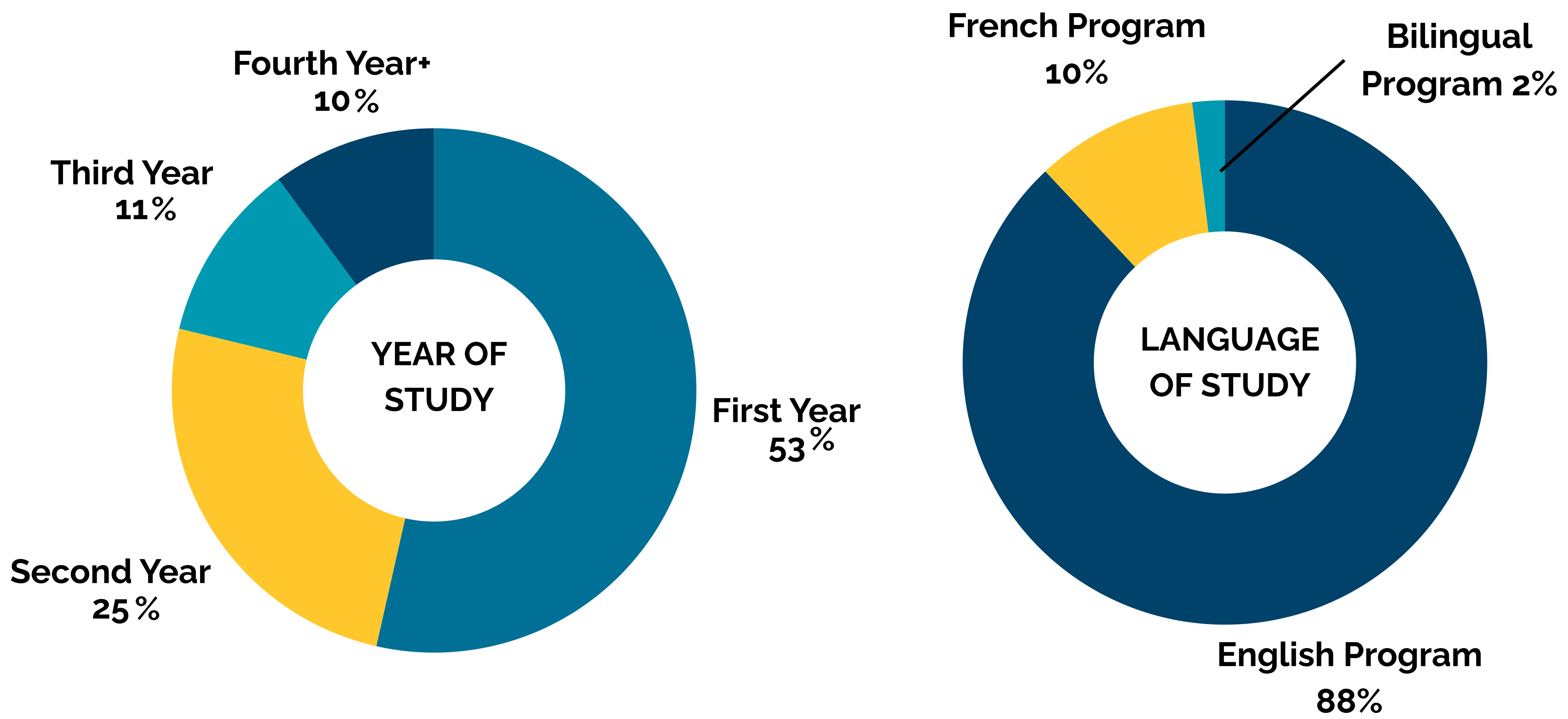
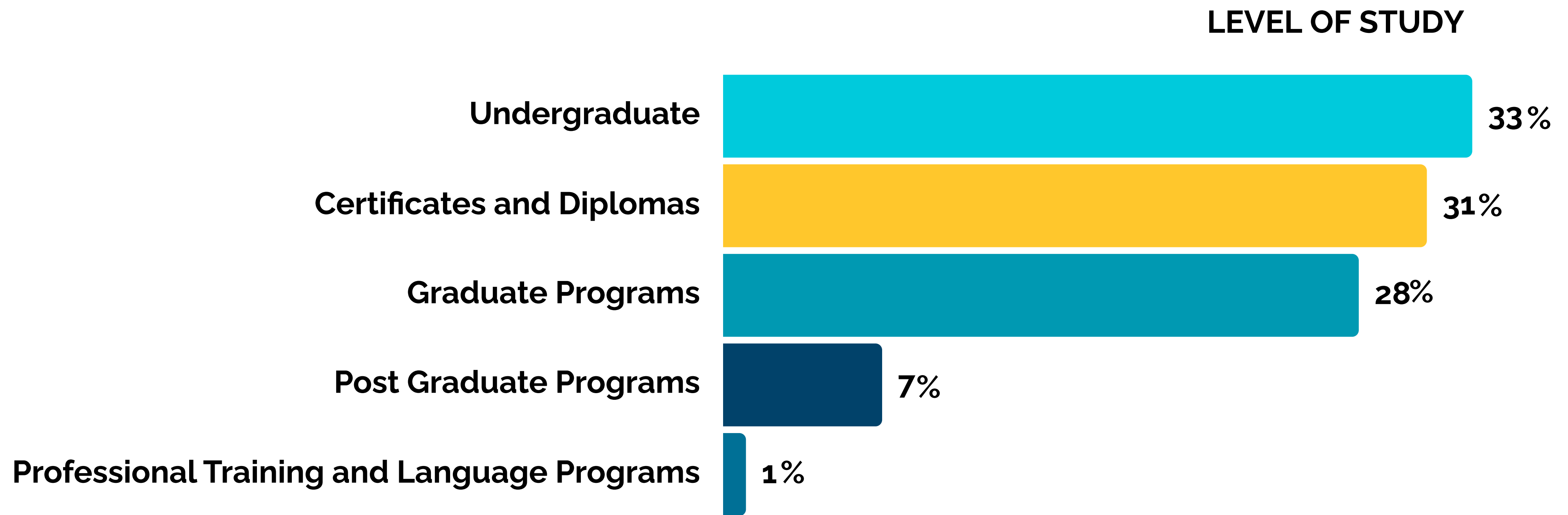
ETHNIC IDENTITY



FIRST-GENERATION TO ATTEND POST-SECONDARY

Note: First person in the immediate family to attend a post-secondary institution. Some chose not to answer.

1.3 RESPONDENT EDUCATION PROFILE



Section 2

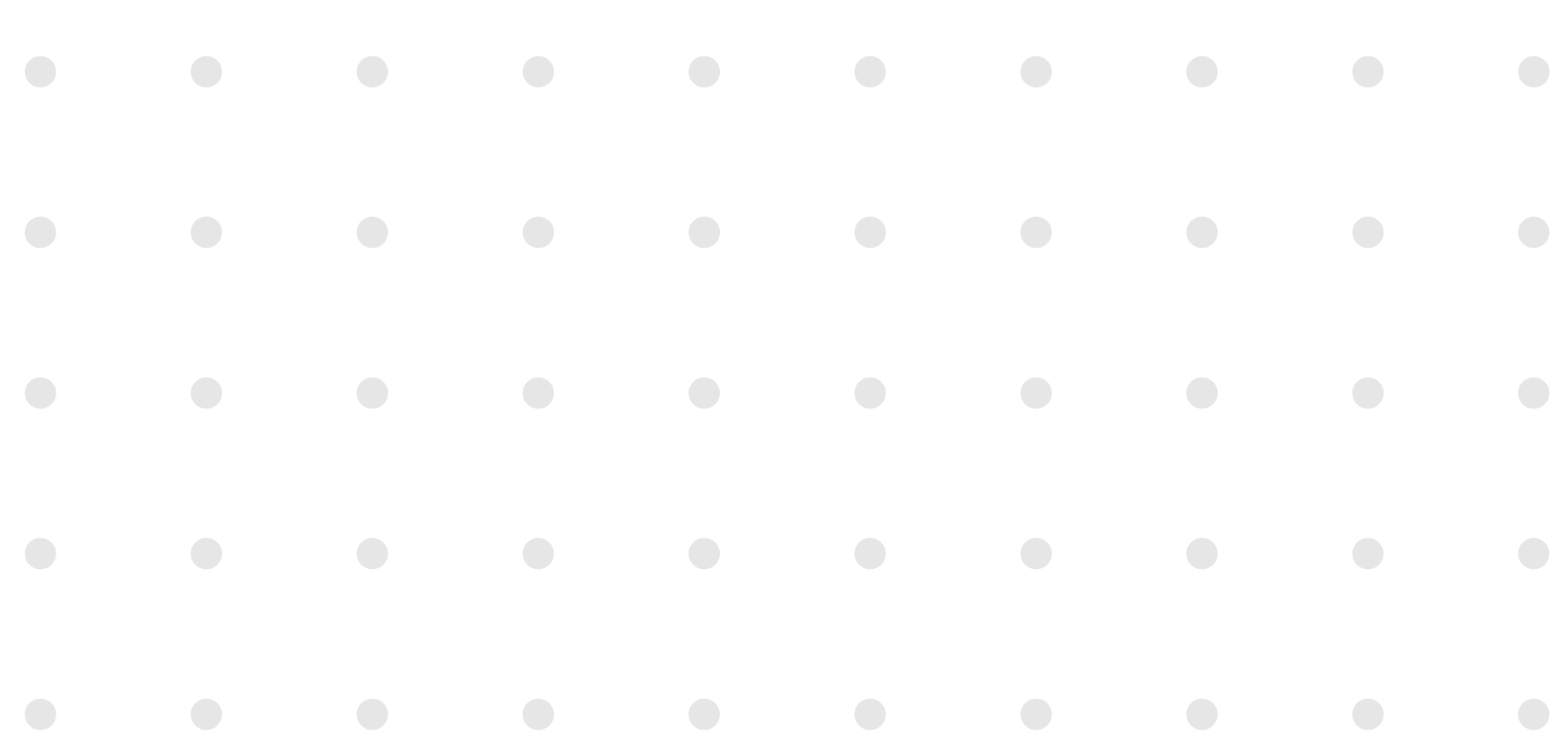
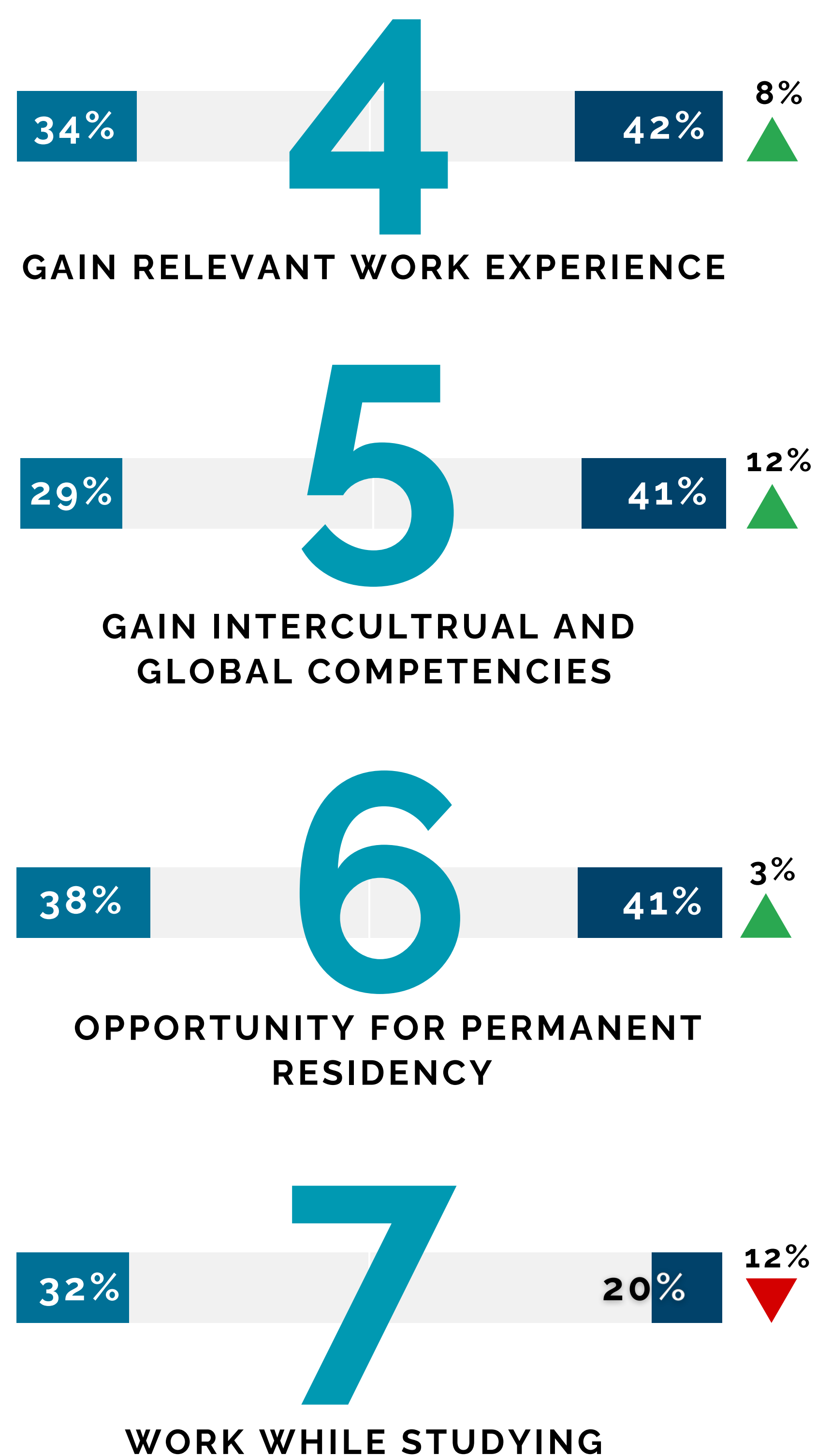
Motivation and Decision-Making

2.1 MOTIVATION TO STUDY IN CANADA

Canada's overall reputation as a safe and stable country continues to score the highest among respondents as a factor for choosing it as a study destination. In addition to this, our reputation as a tolerant and non-discriminatory society and the quality of our educational system round out the top three key factors for respondents. However, there are some notable fault lines emerging.

Respondents gave sharply lower ratings to Canada for certain answers: as a "safe and stable country", for "opportunities to work while studying", and for the "quality of education." Conversely, respondents gave higher ratings than they did in the 2021 ISS to "gain international competencies" and to "work experience related to the program of study."

MOTIVATION TO STUDY IN CANADA



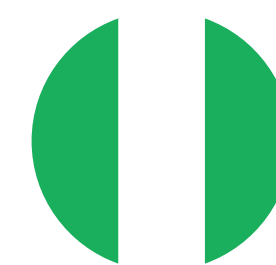
An analysis of the top six source countries reveals important variations in the reasons why respondents chose Canada as their study destination. The most cited factor for Indian respondents is the ease of getting a Canadian study permit. The affordability of studying is the most important factor for Chinese and Nigerian respondents, while the opportunity for work is among the top factors for respondents from the Philippines and India. Respondents from the Philippines and Iran also highly value the opportunity for their spouse to work, and the opportunity to apply for permanent residency. The quality of the Canadian education system was one of the top reasons for choosing Canada for French and Nigerian students along with gaining intercultural awareness while studying in Canada.

TOP REASON TO STUDY IN CANADA BY TOP RESPONDENT COUNTRY



INDIA

Ease of getting a Canadian Study Permit



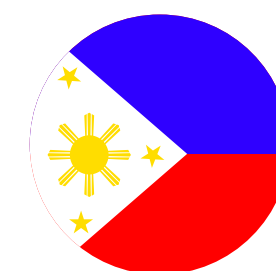
NIGERIA

Gain Intercultural Awareness



CHINA

Affordability



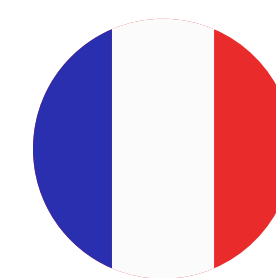
THE PHILIPPINES

Work Opportunities for Spouses



IRAN

Permanent Residency



FRANCE

Gain Intercultural Awareness



For undergraduate respondents, the four main reasons for choosing Canada were: knowing someone who live or studied in the country; the opportunity to work while studying; the affordability of tuition costs; and the ease of getting a Canadian study permit. Respondents in graduate programs gave greater weight to the availability of financial support and opportunities for their spouse to work.

The opportunity for their spouse to work was particularly important for respondents registered in professional training, certificate, diploma, language, and post-graduate programs. In addition to this—and specifically for respondents registered in certificate and diploma programs—the opportunity to gain work experience relevant to their field of study and to apply for a PGWP were the top factors mentioned.

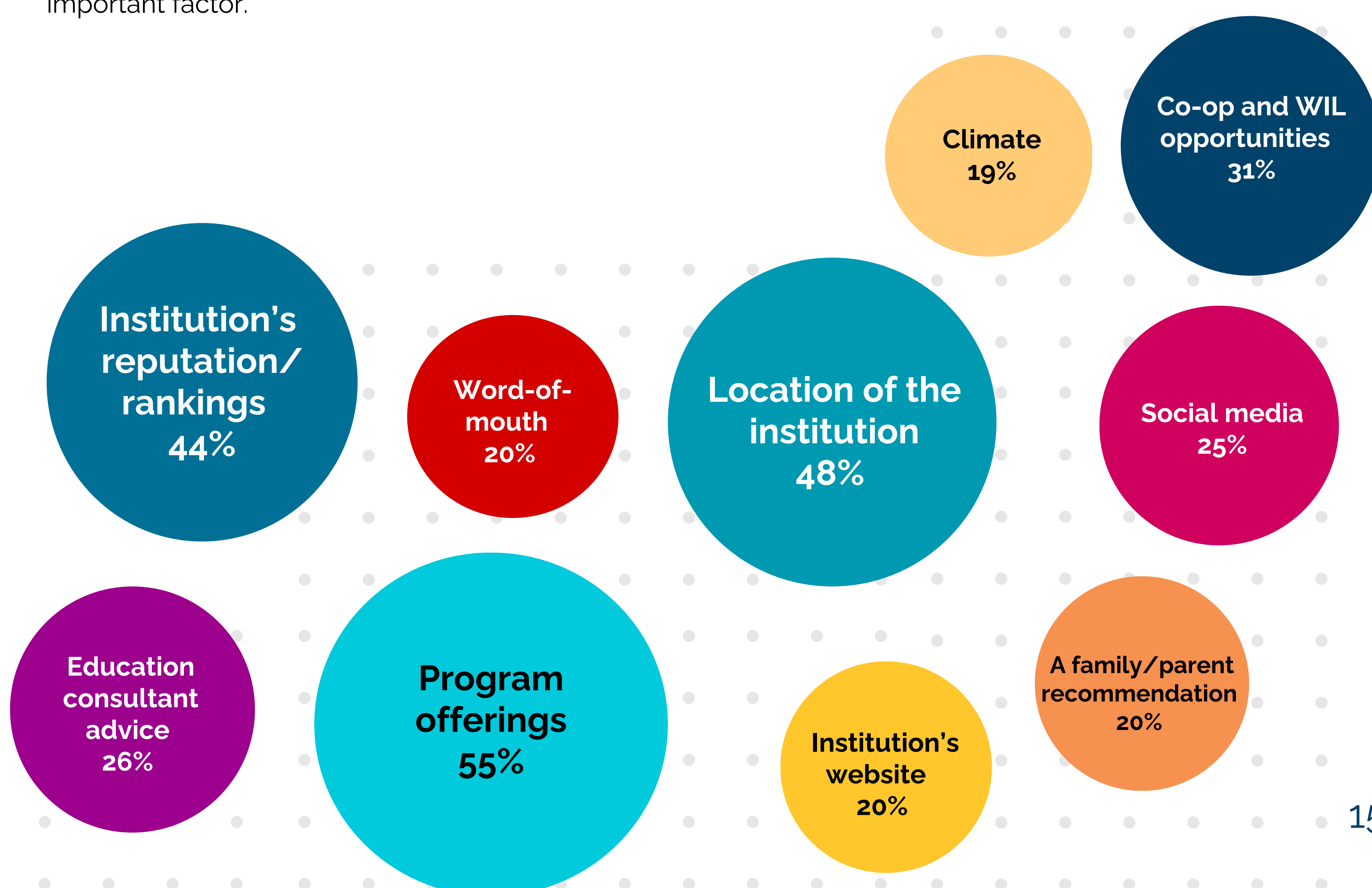
2.2 Factors in Choosing an Institution

Among respondents, the top three reasons across all programs of study for choosing their institution were: their institution's program offerings, location, and reputation/rankings. In addition, about a third (31%) of our respondents selected co-op and WIL opportunities available at their institution as an important factor.

For 41% of post-graduate respondents, advice from an education consultant was identified as a top factor.

Interestingly, why an institution is chosen is influenced by the student's country of origin. For example, for respondents from Nigeria (35%) and the Philippines (44%), opportunities for co-op and WIL were decidedly more important factors in choosing their institution than for those from France (12%) or Iran (14%). Conversely, respondents from Iran (37%) weighted financial support from their institutions the most highly, far outpacing the ranking assigned by the second-highest country, China (16%). Respondents from India (42%) were the likeliest to have relied on the counsel of an education agent, significantly more so than those from China (29%), Nigeria (24%) and the Philippines (23%). For respondents from Nigeria (30%) and the Philippines (33%), word-of-mouth references from friends were important factors in opting for Canada.

TOP FACTORS IN CHOOSING AN INSTITUTION





2.3 Informational Resources

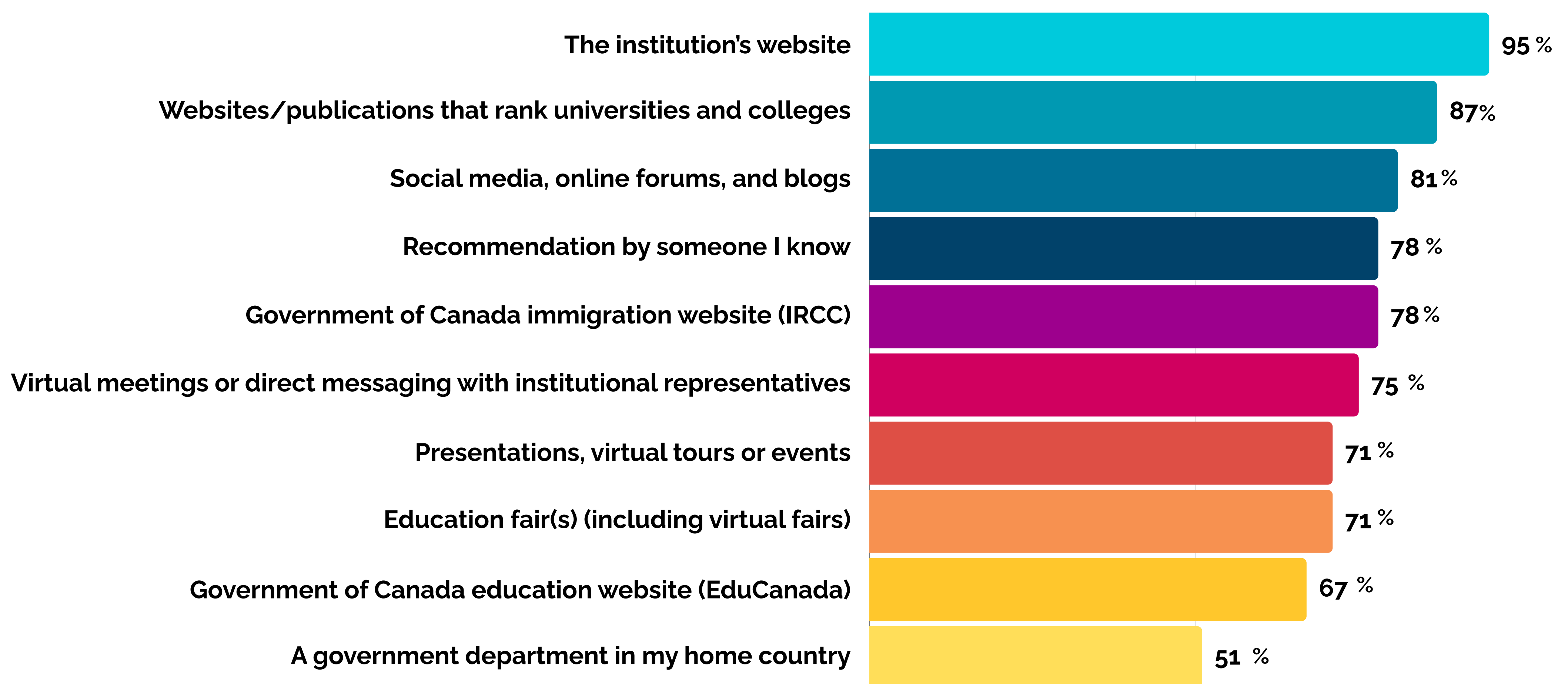
Respondents were also asked to identify the most and least useful resources that they consulted when choosing Canada as their study destination. For most respondents, their host institution's website (95%) and other websites and/or publications that rank universities and colleges (87%) were seen as the most valuable resources to inform their decisions.

"Recommendations from someone I know" dropped slightly from the 2021 ISS rankings, from second to fourth most important source of information.

Conversely, the EduCanada website, government departments in their home country, and presentations, including virtual tours and events, were viewed as the least useful resources.

Interestingly, nationally, while 51% of the respondents found their respective home government website to be a useful resource, 49% rated it as the least useful resource. There were no discernible differences between male and female respondents in their rankings.

MOST USEFUL RESOURCES



2.4 Education Recruitment Professionals

Education recruitment professionals and immigration consultants play a significant role in the student journey, with parents and institutions using their services to help provide advice and assistance for international students who wish to study around the world, including in Canada. Education agents, immigration consultants, and student advisors at institutions were the top three most preferred professionals in terms of assisting respondents in their application. Respondents report that professionals are most often selected through personal recommendations.

Education recruitment professionals can be individuals or organizations located in Canada or abroad offering marketing, promotion, recruitment, and other services in the education sector. Overall, approximately 28% of respondents reported having received assistance from an education recruiting professional.

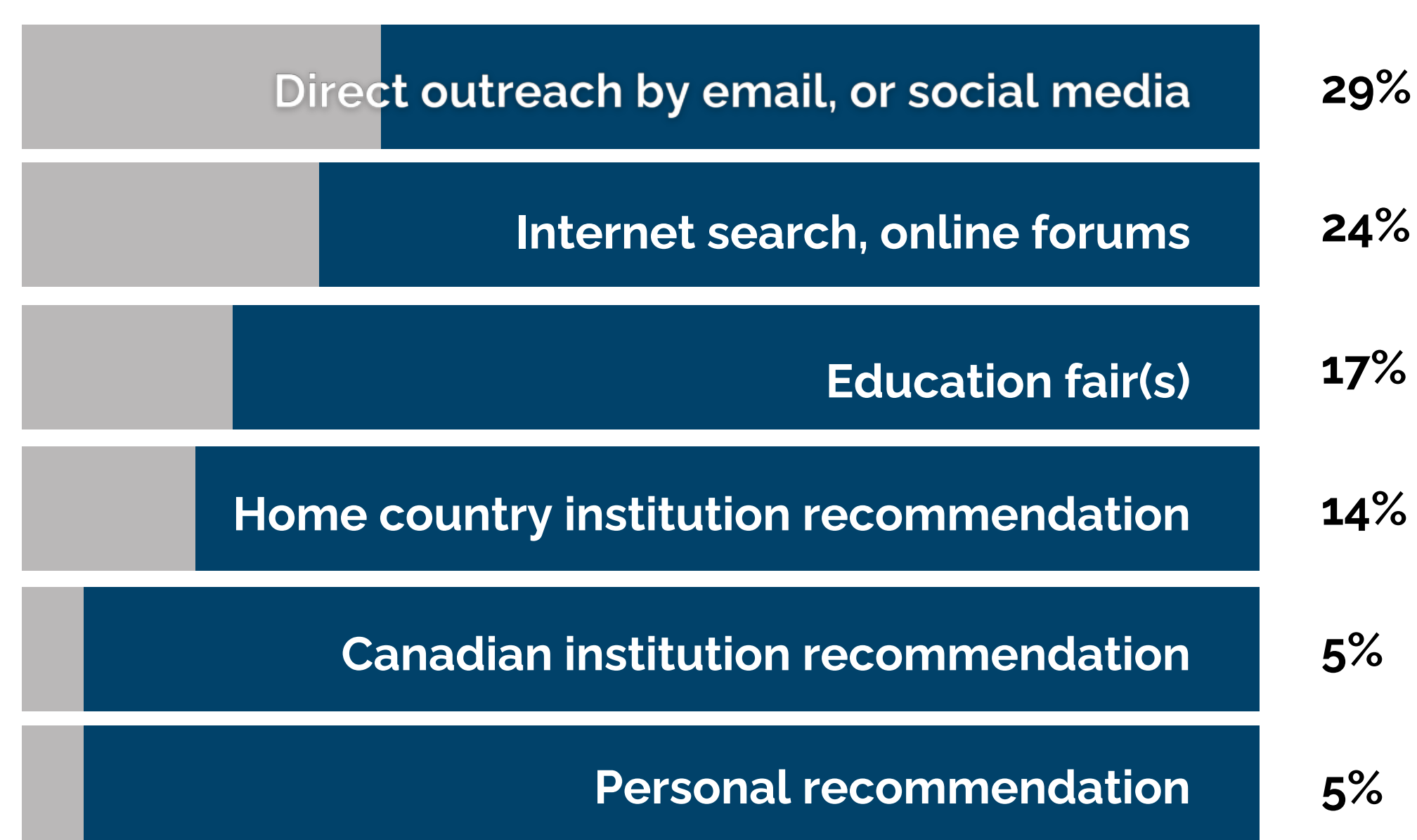
However, there is considerable variance in the reported use of these services by student enrolment.

For example, over 41% of the college respondents received services from an education recruiting professional—twice the number reported for university students (20%).

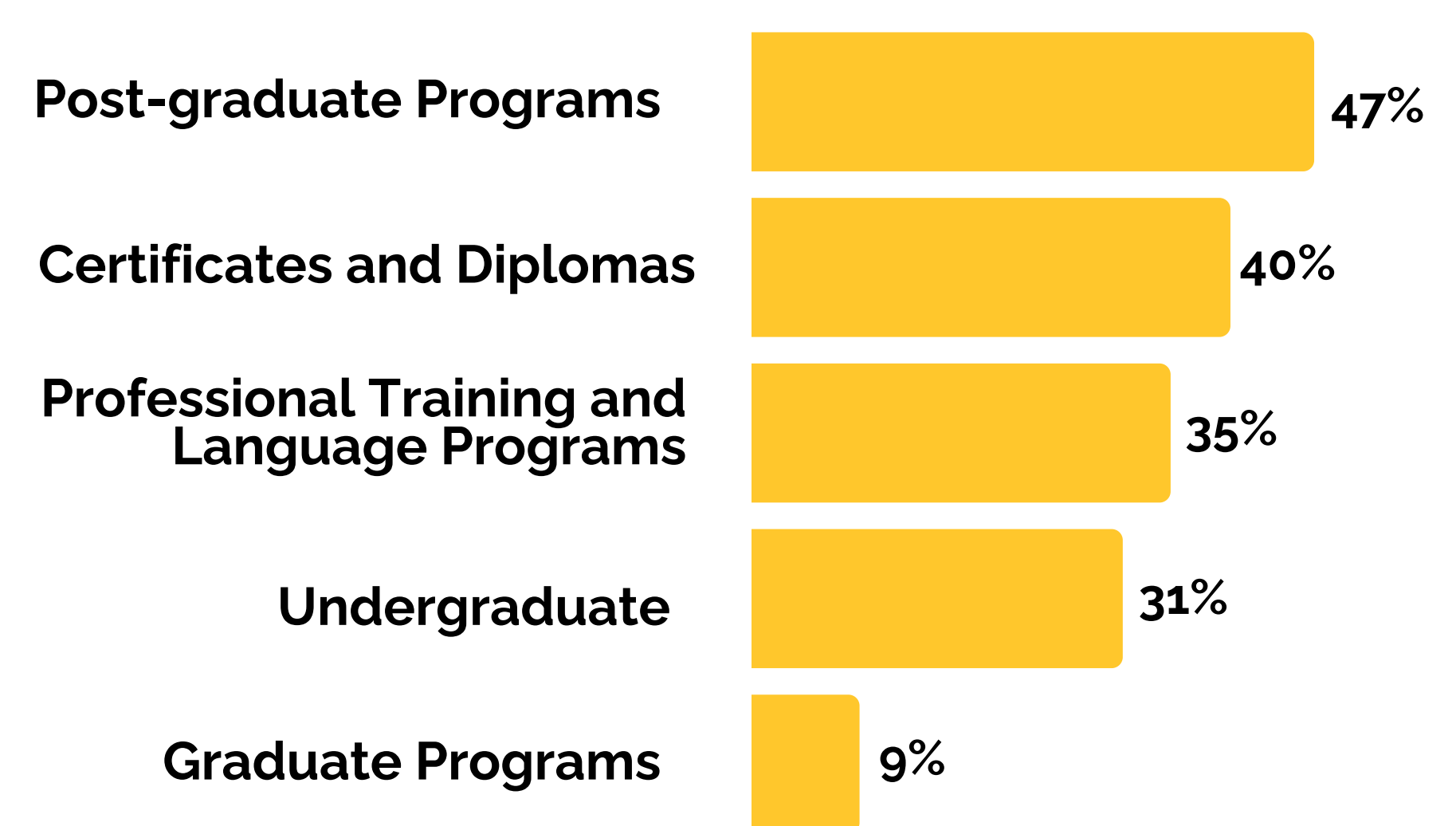
For both university and college student respondents, 90% expressed satisfaction with the services provided by external professionals. This is an important finding that counters the narrative that there are many “bad actor” agents who are offering misleading, sub-par, or even false or inadequate services. Interestingly, about 28% of these users did not verify whether the immigration consultants providing support were licensed to provide these services.

Among the top five source countries, respondents from India (43%) and the Philippines (33%) tend to be more reliant on Education Recruitment Agents, while those from France (5%) are the least reliant.

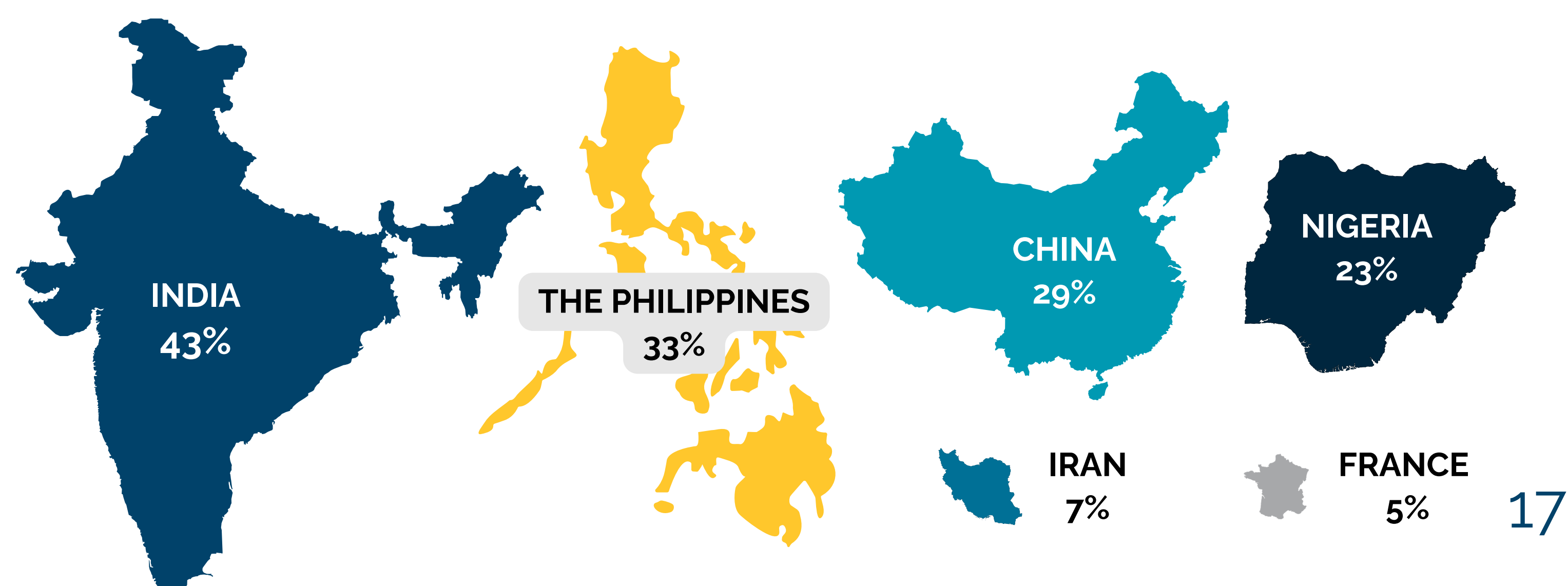
SELECTING A RECRUITMENT PROFESSIONAL



USE OF RECRUITMENT PROFESSIONALS BY LEVEL OF STUDY



USED A RECRUITMENT PROFESSIONAL BY TOP SOURCE COUNTRY



2.5 EXPERIENCE WITH ADMISSIONS AND PRE-ARRIVAL

Among respondents, the top three challenges encountered during or following the process of admission were finding and securing accommodations, transferring funds to the institution, and demonstrating that they hold sufficient funds. Given the sharply higher thresholds for financial sufficiency announced by the federal government in January 2024, this indicator will need to be closely monitored going forward.

Securing biometric data was less of a challenge for respondents than in 2021. Most respondents (80%) did not experience any difficulties with their study permit application. However, of the 18% who experienced difficulties, 70% cited "processing timeliness" as the most challenging part of the application, followed by 32% who cited meeting "eligibility requirements," such as providing proof of financial viability.

CHALLENGES UPON ADMISSIONS AND PRE-ARRIVAL	2021	2023	+/- SINCE 2021
Securing accommodations	53%	60%	+7%
Transferring money	40%	41%	+1%
Demonstrating sufficient funds	27%	35%	+8%
Receiving sufficient information about the institution	21%	25%	+4%
Collecting transcripts and other documents	23%	24%	+1%
Demonstrating intent to return home	16%	19%	+3%
Transferring course credits	14%	16%	+2%
Securing biometrics	21%	15%	-6%
Receiving an acceptance letter	14%	15%	+1%
Achieving language test score requirement	13%	15%	+2%

STUDY PERMIT APPLICATION CHALLENGES*



*Represents the portion of the 18% of respondents who indicated that they had challenges with their study permit application.

Section 3

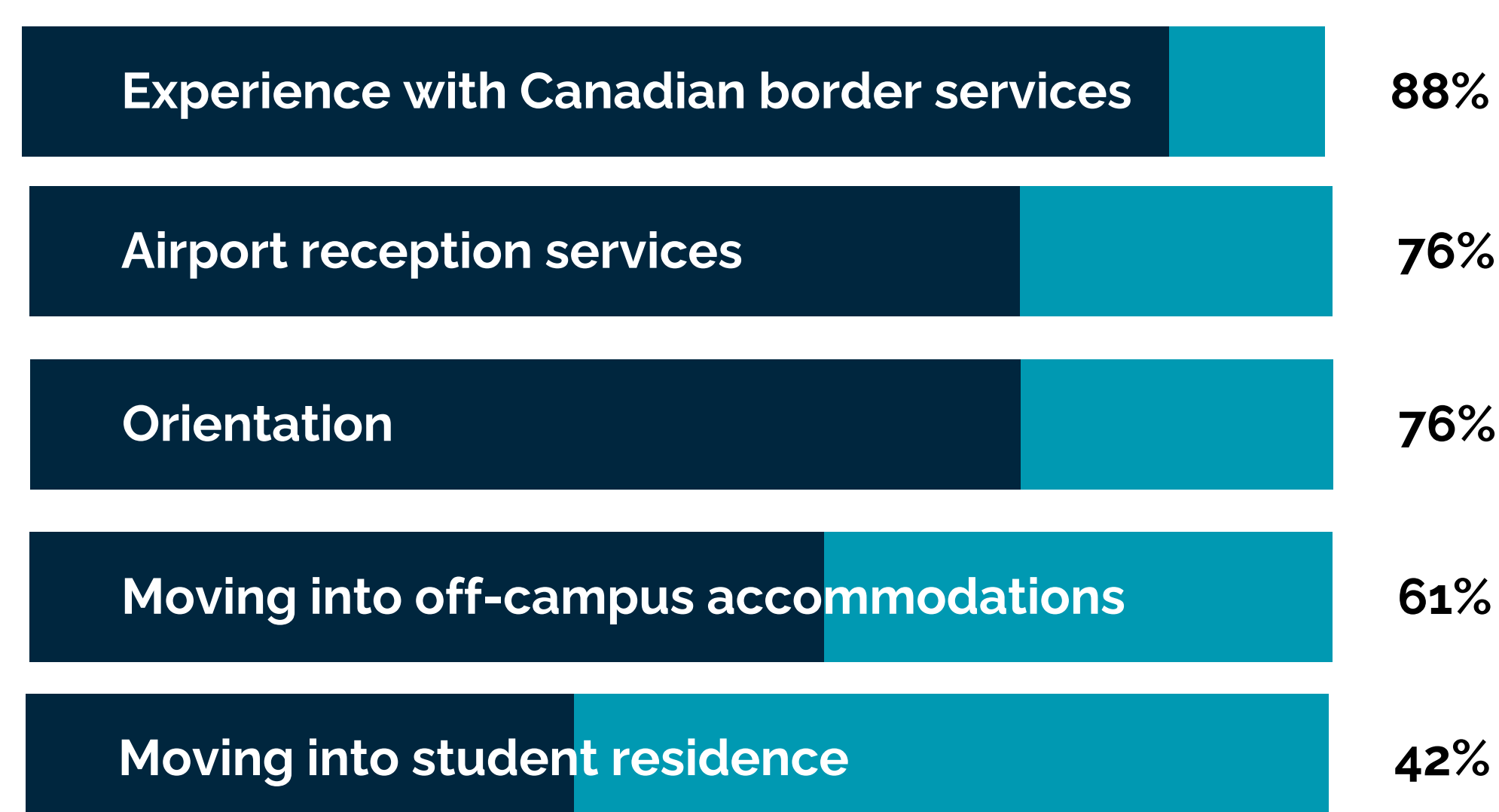
Experience on Arrival

3.1 SATISFACTION ON ARRIVAL

Respondents were satisfied with their experience on arrival in Canada, especially regarding interactions with Canadian immigration officials. However, over 20% cited they were dissatisfied or very dissatisfied with moving into off-campus accommodations.

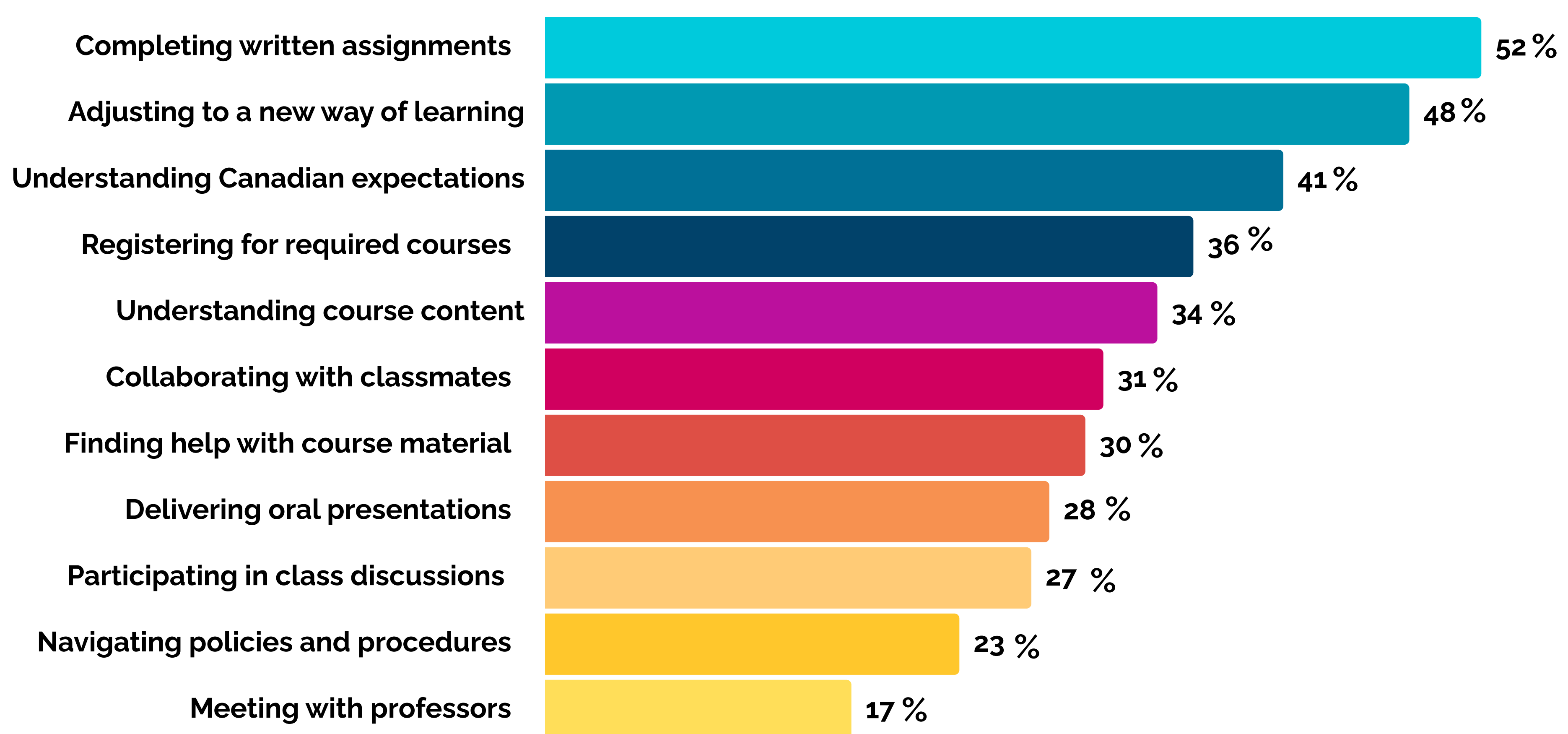
It remains concerning that almost 50% of respondents reported difficulties adjusting to the learning environment and completing written assignments at Canadian institutions after starting their study programs. This is identical to the 2021 ISS results. Making progress on these issues must be a priority for host institutions.

SATISFIED OR VERY SATISFIED UPON ARRIVAL



The 2023 ISS results provide important cues for institutions on where to focus their student orientation, onboarding and ongoing counselling and engagement efforts. Among respondents enrolled in university programs, 67% of first and second-year students reported experiencing "some issues" or "significant issues" adjusting to the learning environment. The corresponding figures for first and second-year respondents enrolled in college (95%), polytechnic (86%) or diploma institutions (89%), highlight the importance of addressing this challenge for institutions.

CHALLENGES STARTING PROGRAM OF STUDY



3.2 BY ACCOMPANIED STATUS

One in five respondents reported being accompanied by either a dependent, either a spouse/common-law partner (15%), child/children (6%) and/or parent/parents (3%), an increase from the 16% reported in the 2021 ISS. Undergraduate respondents were the least likely to come accompanied, with only one out of ten reporting coming with someone in 2023. Women (29%) were more likely than men (20%) and other genders (17%) to arrive accompanied by family members.

Among the top six source countries in terms of accompanied status, respondents from the Philippines stand out, with almost two-thirds (68%) reporting being accompanied.

Respondents from Iran (38% accompanied) and Nigeria (28% accompanied) were much more likely to be accompanied than those from China (14%), France (10%) and India (6%). Nigerian respondents were also twice as likely as those from other source countries to come with their parent(s).

It is unclear whether these changes and differences are attributable to the removal of COVID-19 travel restrictions, challenges accessing daycare services for students accompanied by children, policy changes making it easier for spouses of international students to obtain work permits, or if this reflects a larger structural shift in international student enrolment.

ACCOMPANIED BY DEPENDENT(S)



*Dependents include spouse, common-law partner, child(ren) and/or parent(s).



Section 4

Learning Experience and Campus Life

4.1 Satisfaction with Canadian Study Experience

Just over 80% of all respondents indicated they were "satisfied" or "very satisfied" with their Canadian study experience. While overall satisfaction rates are comparable for college and university students, college students tend to be more 'very satisfied' (37%) than university students (26%).

Rural students are more "very satisfied" (48%) than their urban counterparts (40%), even though overall satisfaction rates are similar.

Regarding regions, Quebec students are the more satisfied (87%), and Ontario students are the more dissatisfied (20%) with their Canadian study experience.

Among respondents, those from France and the Philippines were the most satisfied, with 92% indicating they were either "satisfied" or "highly satisfied". Respondents from Iran (26%), India (20%), Nigeria (18%) and China (16%) expressed overall dissatisfaction with their Canadian study experience.

SATISFACTION WITH THE CANADIAN STUDY EXPERIENCE



Very Dissatisfied
4%



Dissatisfied
14%

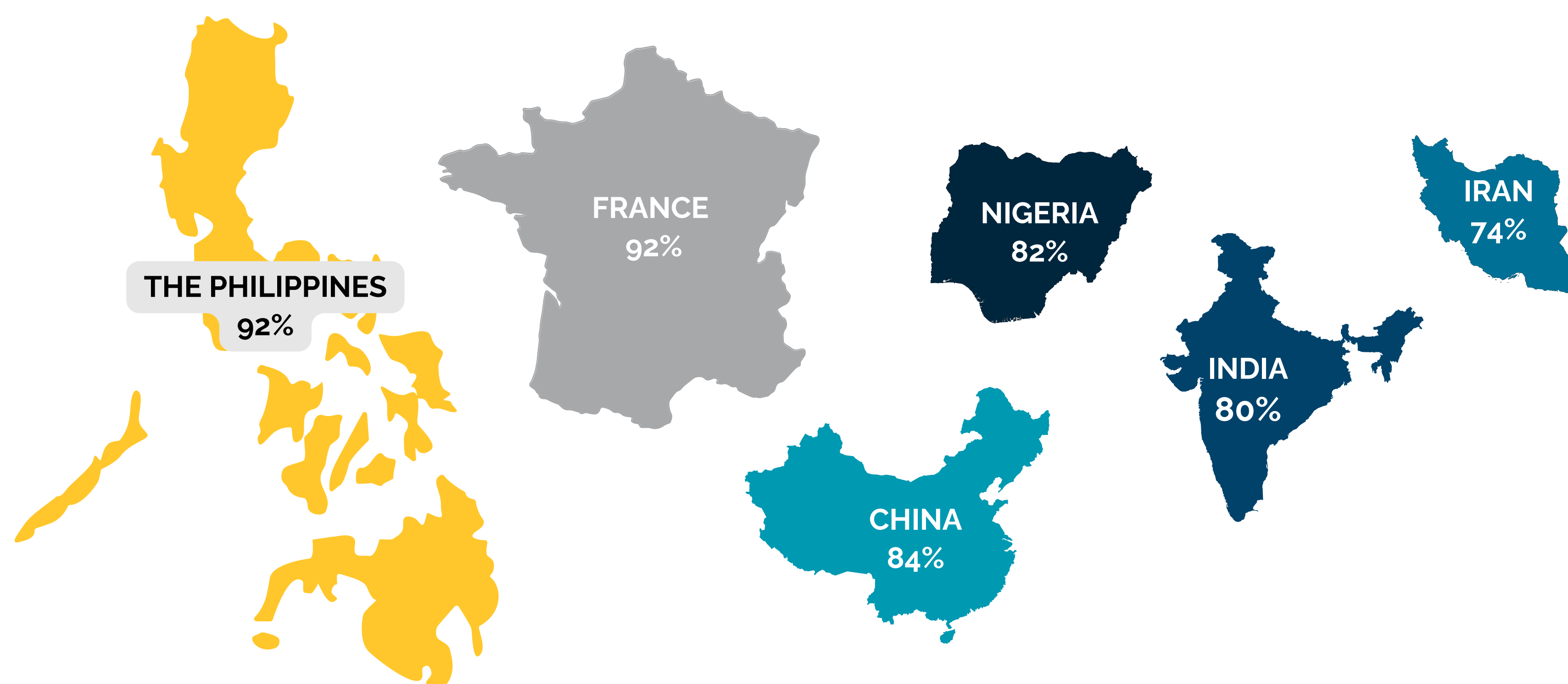


Satisfied
52%



Very Satisfied
30%

SATISFACTION WITH CANADIAN STUDY EXPERIENCE BY TOP SOURCE COUNTRIES



4.2 SATISFACTION WITH INSTITUTIONAL SERVICES

Overall, there are only minor differences in terms of respondents' reported satisfaction with institutional services. Respondents were generally satisfied with the level and quality of available institutional services. However, a sizeable number of student respondents reported they were dissatisfied or very dissatisfied with five key areas of institutional services: residence and housing (17%), financial aid services (15%), health services (14%), career and employment (12%) and WIL and experiential learning services (10%).

While respondents were dissatisfied with certain aspects of institutional support services, most respondents indicated that they either were not aware of such services, or they never took advantage of support offered by the institution.

For example, 54% of respondents indicated that they never used the counselling and mental health support services that were available at the institution.

As was the case with the 2021 ISS results, there remains a clear disconnect between the self-reported needs of international students and the actual accessing of available services and supports within institutions. Institutions may want to consider further proactive efforts during orientation and onboarding to raise awareness among international students about the range of support services that are available to them.





SATISFACTION WITH INSTITUTIONAL SUPPORT AND SERVICES AWARENESS	OVERALL SATISFIED	NEVER USED THIS SERVICE	DID NOT KNOW ABOUT THIS SERVICE
International Office Services	62%	25%	4%
International Student Advising	62%	26%	3%
Additional Language Support	34%	55%	7%
Residence and Housing	38%	42%	4%
Recreational Facilities	58%	30%	4%
Facilities for Worship	30%	54%	11%
Health Services	50%	34%	2%
Mental Health Services	35%	54%	3%
Academic Advising	59%	31%	2%
Admissions Offices	47%	43%	3%
Registrar's Office	62%	29%	2%
Financial Aid Services	38%	44%	3%
Library Services	83%	12%	<1%
Safety Services	61%	33%	2%
Accessibility Services	33%	61%	3%
Student Associations	55%	35%	3%
Student Clubs	55%	36%	3%
Career and Employment Services	47%	38%	3%
Experiential Learning Services	37%	48%	5%

4.3 FUNDING AND FINANCIAL SUPPORT

One-third of respondents depend on parents, relatives, or guardians to support their education in Canada. Conversely, over 55% of respondents selected personal savings, and more than one in three (39%) selected off-campus work as sources of funding.

Of note, the number of students relying on off-campus work increased from 33% in 2021, to 39% in 2023, while those relying on their parents and families for financial support declined from 78% to 67% over the same period.

FINANCIAL SUPPORT	2021	2023	+/- SINCE 2021
Parents, relatives, or guardians	78%	67%	-11%
Personal savings	53%	55%	+2%
Off-campus work income	33%	39%	+6%
University or college scholarship	24%	21%	-3%
Spouse	11%	14%	+3%
On-campus work income	11%	14%	+3%
Government of Canada scholarship/aid	7%	7%	-
Home country scholarship/aid	12%	5%	-7%
Paid WIL	3%	5%	+2%
Financial support from other government or agency sources	1%	3%	+2%

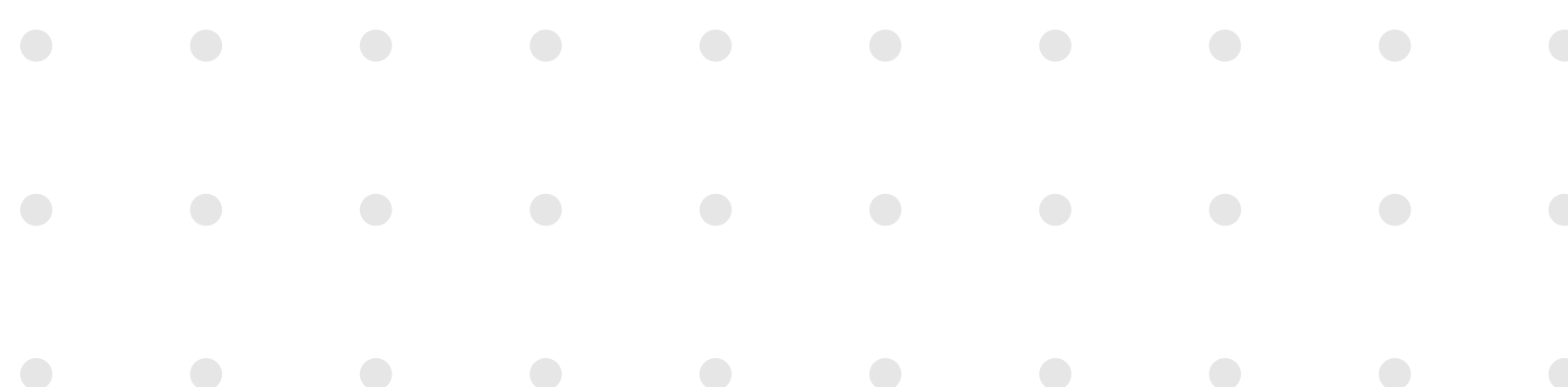
4.4 ACCOMMODATIONS

Sixty percent of respondents indicated they faced issues finding and securing accommodations in Canada. Regardless of region, respondents reported challenges finding accommodations. Not surprisingly, the data shows these challenges were highest for students in their first year (about 50%) and second year of study (25 to 30%).

While on-campus residence is a desirable option to support international students, availabilities are few with 14% of respondents in the 2021 ISS identifying residence as their type of accommodation. This underscores the importance of institutional support for newly arriving students and those leaving residences after their initial year of study.



60% OF RESPONDENTS HAD CHALLENGES WITH SECURING ACCOMMODATIONS



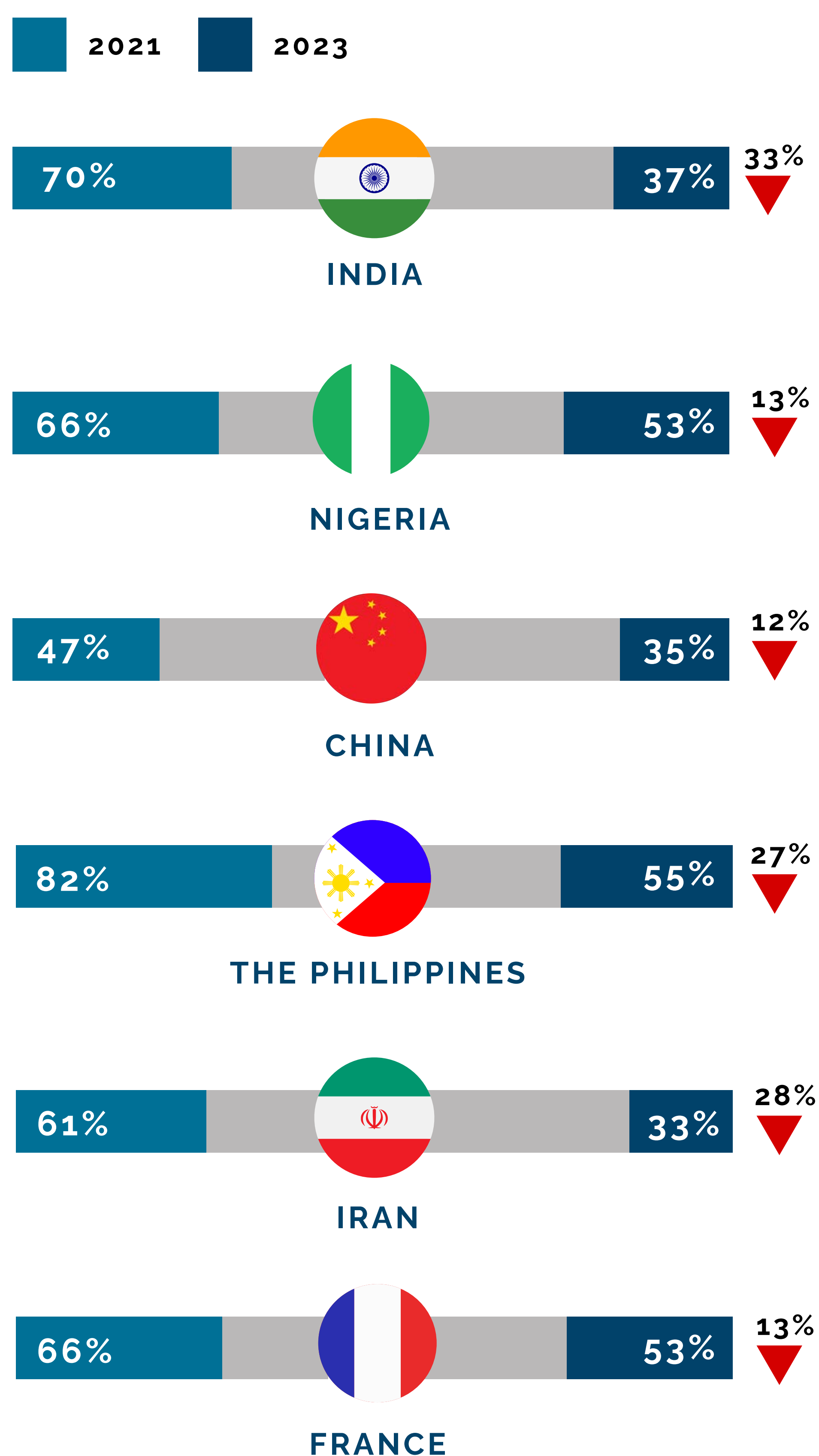
4.5 RECOMMENDING CANADA AND INSTITUTIONS AS STUDY DESTINATIONS

There has been a troubling decline since the 2021 ISS in the number of respondents indicating they would recommend Canada as a study destination. As compared to 2021, promoters of Canada as a study destination decreased from 64% to 41%. Conversely, detractors of Canada as a study destination increased from 13% to 28%. When we look at the results by top sending countries, this is especially noteworthy for respondents from India, where support dropped 33% between 2021 and 2023 (from 70% to 37% respectively), and from Iran, where

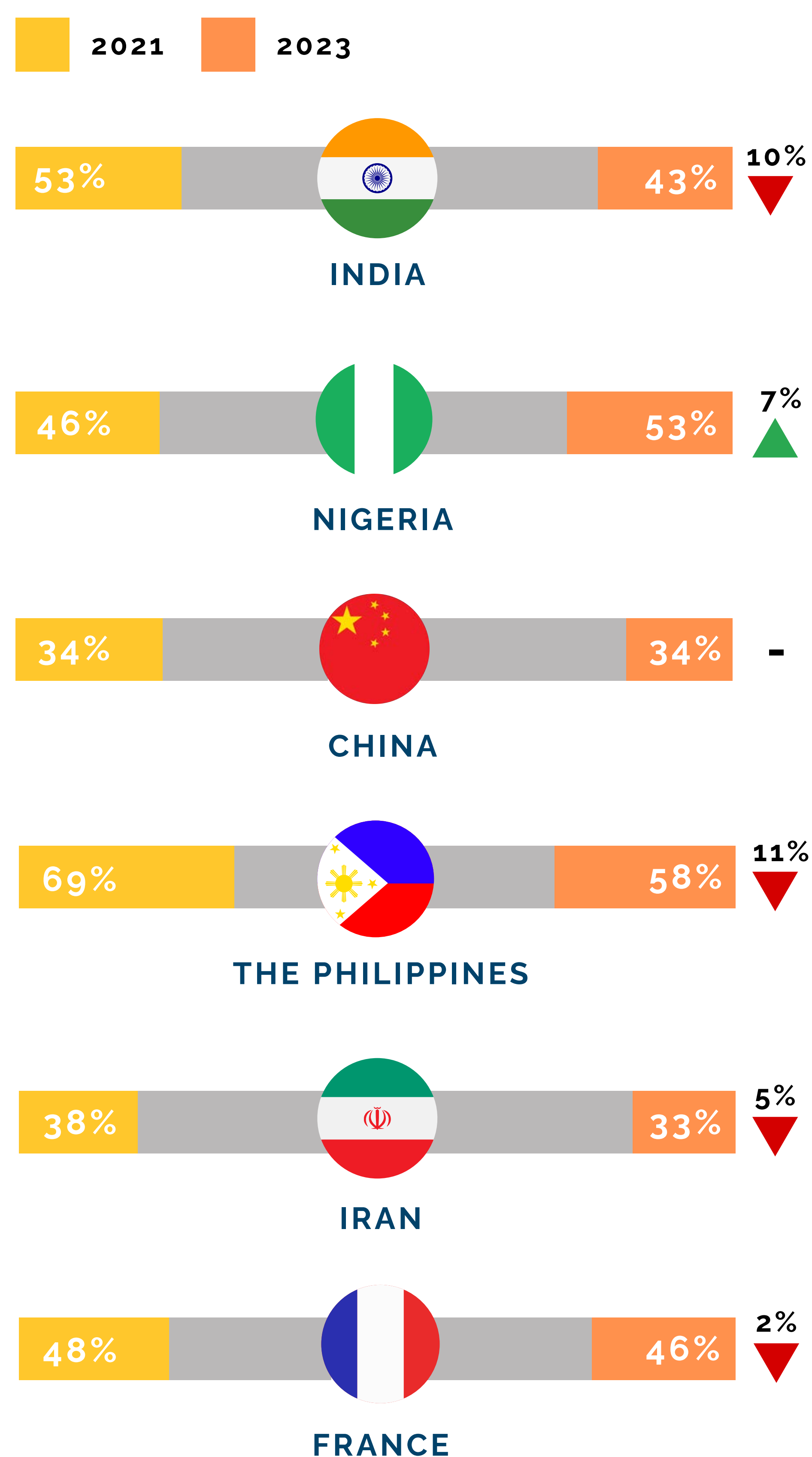
support dropped 28% (from 61% to 33%) and from the Philippines, where support dropped 27% (from 82% to 55%).

While this pattern does not carry over for three of the five top source countries in terms of their likelihood to recommend their institutions (scores from China and France were stable while support from respondents from Nigeria rose 7%), there were notable declines from the Philippines (down 11% from 2021) and India (down 10% from 2021).

RECOMMEND CANADA AS A STUDY DESTINATION BY TOP RESPONDENT COUNTRY



RECOMMEND THE INSTITUTION AS A STUDY DESTINATION BY TOP RESPONDENT COUNTRY



Section 5

Safety, Well-Being, and Inclusion

5.1 FEELINGS OF BELONGING

Respondents generally agreed with statements indicating that their institution, faculty, and administration were effectively acknowledging their personal and academic needs, treating them with respect and making them feel welcomed and valued. All these indicators have trended up since the 2021 ISS. Respondents enrolled in colleges reported a slightly higher sense of belonging overall than university students.

Despite these positive and improving ratings—especially the 8% increase among respondents indicating greater community connection within their institutions—19% of respondents agreed with the statement: “I have considered leaving my institution because I felt isolated or unwelcome” and a further 12% neither agreed nor disagreed with that statement. This troubling finding increased by 2% since 2021.

The gender breakdown of belonging among student respondents shows slight differences between female and male respondents.

However, the stronger trend is that gender-diverse respondents report substantially less institutional belonging.

Looking at data on belonging by ethnic identity, it can be seen that Indigenous respondents expressed less institutional belonging. Conversely, Southeast Asians express the strongest institutional belonging across all categories. Among respondents, those from the Philippines reported the highest overall scores in response to questions regarding feeling valued, respected, and included at their institutions. Respondents from France also gave a high rating to questions related to feeling respected at their institutions. Respondents from China and India were the likeliest to agree with the statement that they considered leaving their institutions.

Absent comparative data for Canadian students, it is difficult to draw any definitive conclusions about whether these feelings of belonging represent systemic problems or are especially salient for international students.

SENSE OF BELONGING AT THE INSTITUTION	2021	2023	+/- SINCE 2021
Feel valued as an individual	66%	70%	+4%
Feel belonging	70%	73%	+3%
Feel treated with respect	83%	85%	+2%
Feel included by faculty	79%	82%	+3%
Feel included in academic research/study groups	72%	77%	+5%
Found community(ies)	57%	65%	+8%



19%

feel isolated or consider leaving their institution. This is a +2% increase over 2021 (17%).

5.2 FEELINGS OF SAFETY

Respondents generally indicated high degrees of perceived safety, especially in their own accommodations, on-campus and online. They were less at ease in public spaces, and respondents reported the lowest feelings of safety on public transit (21%). Of greater concern is that the overall sense of safety reported by respondents has deteriorated since 2021 in both public spaces (5% more insecure) and in public transport (6% more insecure).

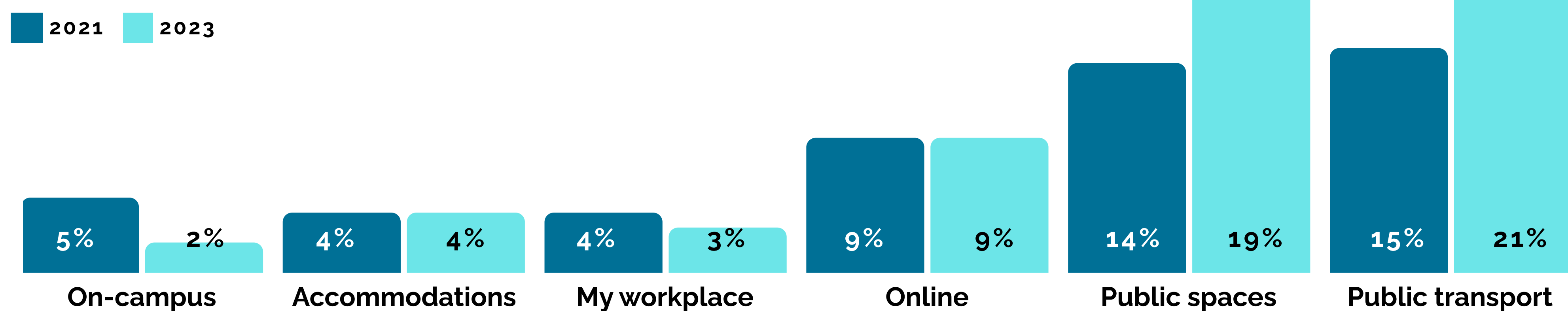
When feelings of safety are examined by gender, respondents who indicated a gender-diverse identity reported the lowest levels of feelings of safety in each category, followed by female respondents. By cultural/ethnic identity, Asian students reported the lowest feelings of safety in all categories.

About a quarter of Chinese respondents reported feeling unsafe in public spaces and public transport, while the corresponding result for students from India was just under 15%. Respondents from France and Nigeria reported feeling relatively safer than their counterparts.

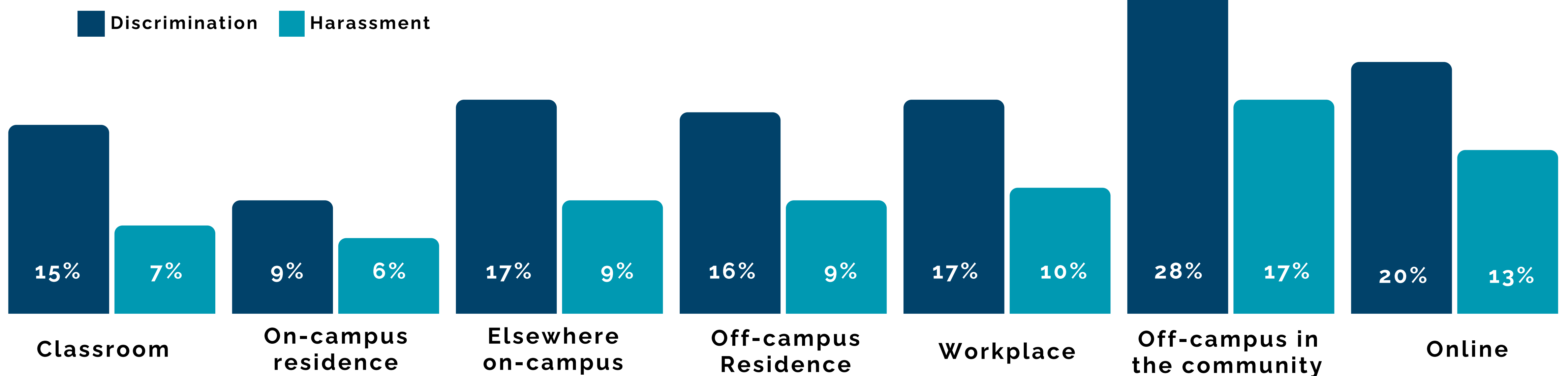
5.3 EXPERIENCES OF DISCRIMINATION OR HARASSMENT

Among all respondents, discrimination and harassment experiences were higher in off-campus locations. The differences for gender-diverse respondents were especially marked in the community and online. Across four of the seven indicators examined, while the differences are slight, male respondents were more likely to report having experienced harassment or discrimination than females. Gender-diverse respondents reported the most frequent experiences of harassment across all locations.

FEELING UNSAFE BY LOCATION



REPORTS OF DISCRIMINATION OR HARASSMENT BY LOCATION



Respondents from China and from Iran were the likeliest to report having experienced both discrimination and harassment, followed by those from India. The numbers are worrying and demand a call to action. It is unacceptable that 37% of respondents from China and Iran and about a quarter of respondents from India, Nigeria, and the Philippines reported having experienced

discrimination in the community. It is equally unacceptable and troubling that one in four respondents from China, Iran, India and Nigeria reported having experienced discrimination in an off-campus residence, or that one in four respondents from Iran, India, Nigeria and the Philippines reported experiencing discrimination in their workplace.

REPORTING DISCRIMINATION OR HARASSMENT BY TOP SOURCE COUNTRY

	Discrimination					
	China	France	India	Nigeria	The Philippines	Iran
In the classroom	16%	6%	17%	14%	11%	18%
In an on-campus residence	12%	3%	11%	9%	6%	12%
Elsewhere on campus	22%	7%	18%	18%	14%	23%
At an off-campus residence	21%	4%	19%	19%	12%	26%
At a workplace	13%	10%	21%	17%	19%	21%
In the community (off-campus)	37%	14%	26%	29%	23%	37%
Online environment	39%	10%	22%	14%	14%	26%

	Harassment					
	China	France	India	Nigeria	The Philippines	Iran
In the classroom	9%	3%	9%	5%	5%	10%
In an on-campus residence	8%	2%	8%	4%	3%	7%
Elsewhere on campus	12%	4%	10%	7%	5%	12%
At an off-campus residence	12%	3%	11%	8%	5%	13%
At a workplace	9%	6%	13%	8%	9%	12%
In the community (off-campus)	25%	12%	15%	13%	12%	22%
Online environment	25%	6%	13%	9%	7%	16%



INSTITUTIONAL RESPONSE TO REPORTING DISCRIMINATION AND HARASSMENT

52%

Know who to contact if an act of discrimination or harassment is observed at the institution or online

While on average, 60% of respondents indicated that they are confident of their institution's responsiveness to reports of harassment and discrimination, continued vigilance is essential.

50%

Know the process for reporting acts of discrimination or harassment

Of importance and concern is the fact that the data show that approximately only 50% of students know who to contact to report an incident, and what the process is for reporting acts of discrimination and/or harassment.

67%

I am confident that the institution would take the necessary steps to address/resolve the issue

There is thus a need to increase the dissemination of knowledge within institutions on how to deal with discrimination and harassment incidents.

Section 6

Working While Studying

6.1 WORKING WHILE STUDY

The opportunity to gain work experience is a vital component of the international student experience. Twenty percent of respondents ranked this among the most important factors motivating their choice of Canada as a study destination. Relative to the 2021 ISS, the number of respondents indicating they were (or are) working increased by 9% to 57%.

Among respondents who reported working during their studies, 70% deemed the work income to be “absolutely required”. This level of reliance varies across different types of institutions and education levels, with college students and graduate students expressing a greater dependency on work income.

Students at colleges are more likely to view their work income as absolutely required (75%) compared to university students (66%).

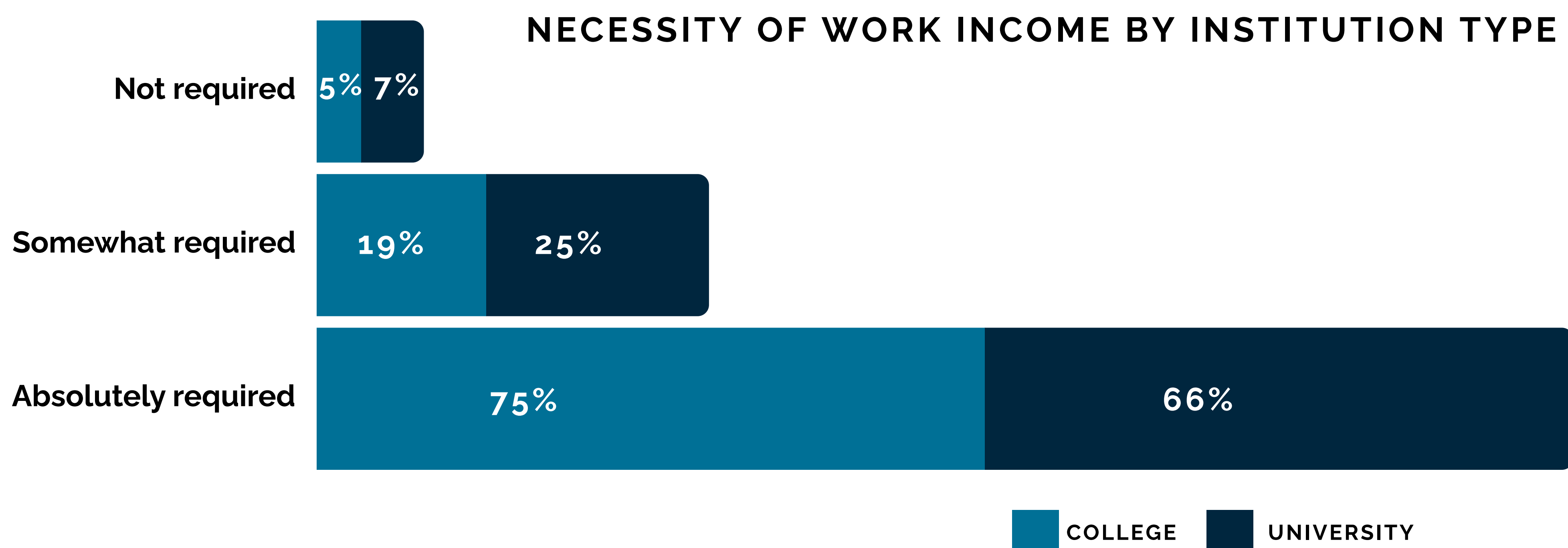
In addition, 12% of international students held multiple jobs relatively consistently across provinces. The percentage of students holding multiple jobs across colleges and universities is almost identical, suggesting that the pressure or opportunity to take on more than one job is widespread across Canada. Graduate students, in particular, tend to work multiple jobs more than undergraduates.



57%
STUDENTS
REPORT WORKING
WHILE STUDYING



9%
INCREASE
SINCE 2021



6.2 HOURS OF WORK

For respondents who reported they were working or had worked, 17% reported working between 21 and 30 hours a week, and 14% indicated they were working more than 31 hours. These latter findings are surprising given the maximum cap on allowable working hours for international students.

HOURS OF WORK PER WEEK



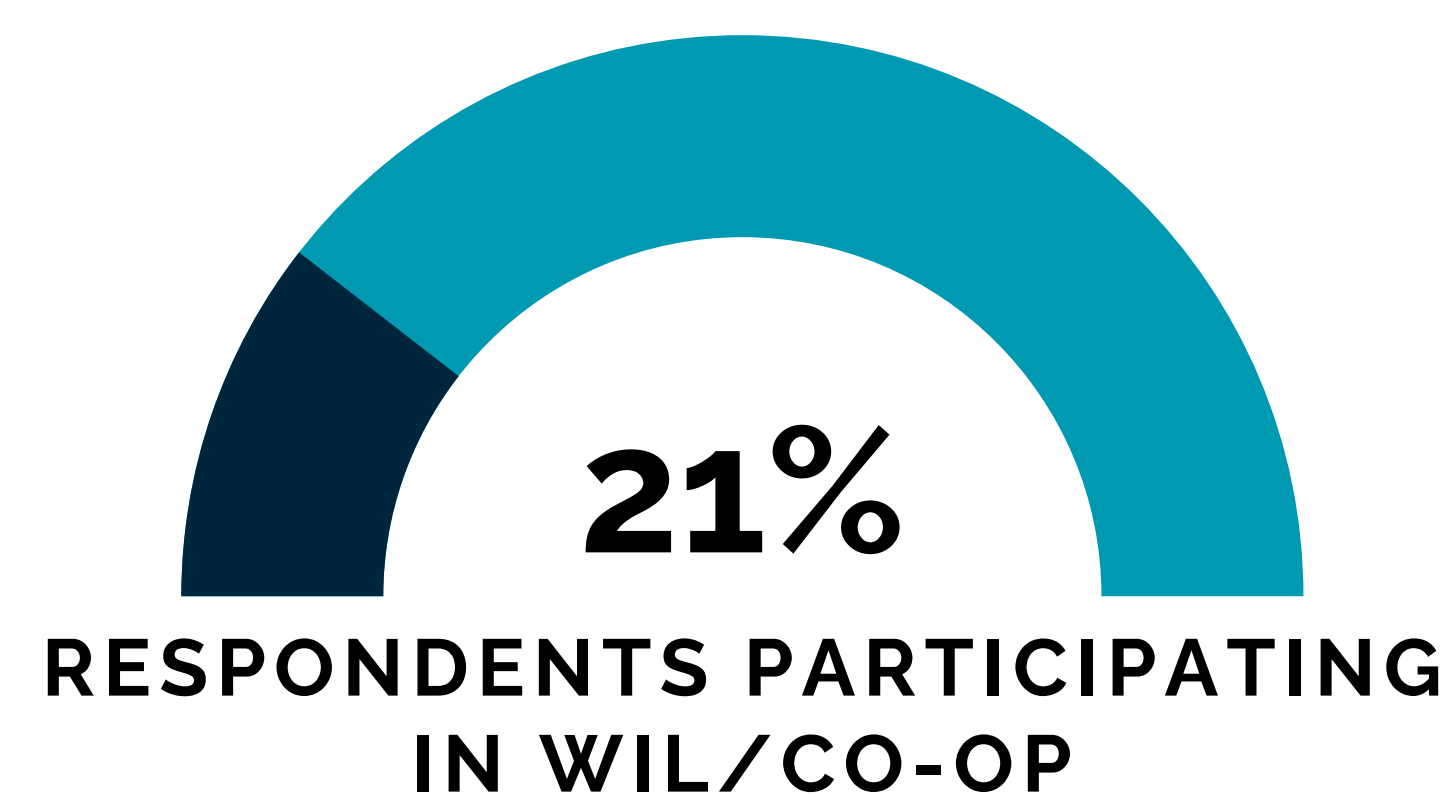
6.3 TYPE OF WORK

Respondents enrolled in colleges were more likely to report working off-campus (89%) relative to those enrolled in universities (61%). Respondents from universities were more likely to work on campus (29%) than their college counterparts (6%). Graduate students were also significantly more likely to report being employed on-campus (39%) than undergraduate students (19%).

Respondents enrolled in colleges reported a higher overall employment rate (61%) than their university counterparts (55%). Among respondents who reported working, 23% are or were in WIL or co-op opportunities facilitated by their institutions.

Enrolment in WIL/co-op programs is similar across institution type. Overall participation in WIL/co-op programs among respondents has increased sharply since 2021 (from 3% to 21%). However, this data is difficult to interpret given the impacts of the COVID-19 pandemic lockdowns.

OFF-CAMPUS WORK BY INSTITUTION TYPE



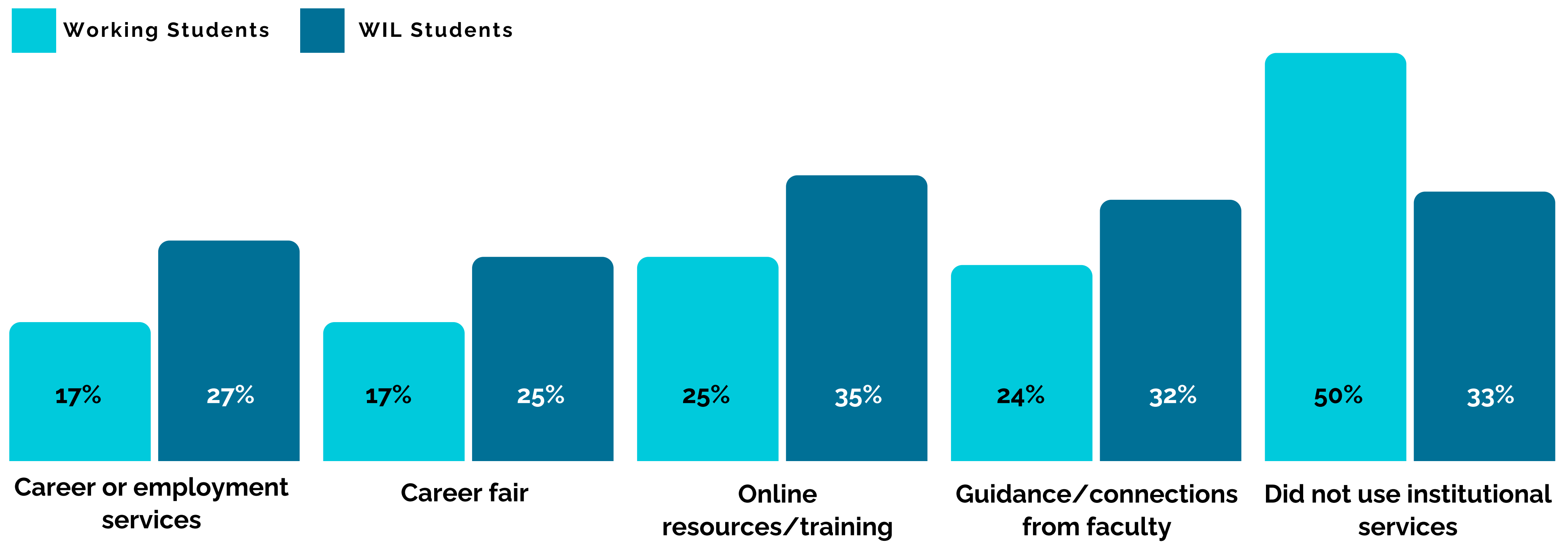
This represents an 18% increase from 3% in 2021.

6.4 SUPPORT IN FINDING WORK

While respondents rated online resources and training by their institution as the most useful forms of institutional support, one-half of all working respondents reported having received no institutional support in finding work.

Among working students, students in WIL or co-op programs tend to use more institutional support (on average 10% more).

INSTITUTIONAL SUPPORT IN FINDING WORK



6.5 BARRIERS TO WORK

When searching for work in Canada, respondents cited a lack of sufficient work experience (27%) and the inability to understand the expectations of Canadian employers (27%) as the top challenges. On a more positive note, respondents were more confident than their 2021 counterparts that they had sufficient work experience and job search skills to find employment.

Four in ten respondents agreed with the statement that Canadian employers struggled to understand or appreciate the skills and abilities international students can bring to their businesses or organizations, or that they lacked confidence in international students.

Moreover, about a quarter of respondents agreed with the statement that Canadian employers do not understand regulations for hiring international students and struggle with work permit applications and immigration-related issues.

Institutions can and should consider playing a more proactive role in mitigating these challenges. For example, they could deliver information sessions to business and community organizations on the unique added value that international students can provide. They could also offer information on how to facilitate the recruitment and onboarding of international students.

PERCEPTIONS OF RESPONDENTS ON CANADIAN EMPLOYERS



PERCEIVED CHALLENGES IN FINDING WORK	2021	2023	+/- SINCE 2021
I am confident in my skills, but I do not understand Canadian employer expectations/work culture.	26%	27%	1%
I do not have any or enough work experience.	37%	27%	-10%
I have no time to work.	21%	23%	2%
I face other challenges such as accessible transportation, affordable housing/childcare, banking issues, etc.	23%	21%	-2%
I struggle to describe my previous work experience, skills and abilities to potential Canadian employers.	21%	18%	-3%
I lack confidence in my abilities and job search skills.	18%	13%	-5%
I struggle with the work permit application and other immigration-related issues.	10%	8%	-2%

Section 7

Post-Graduation Plans

7.1. POST-GRADUATION INTENTIONS

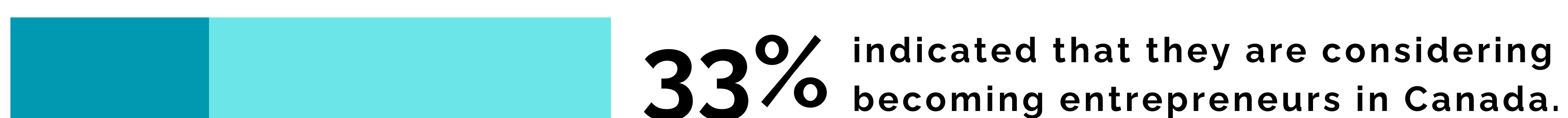
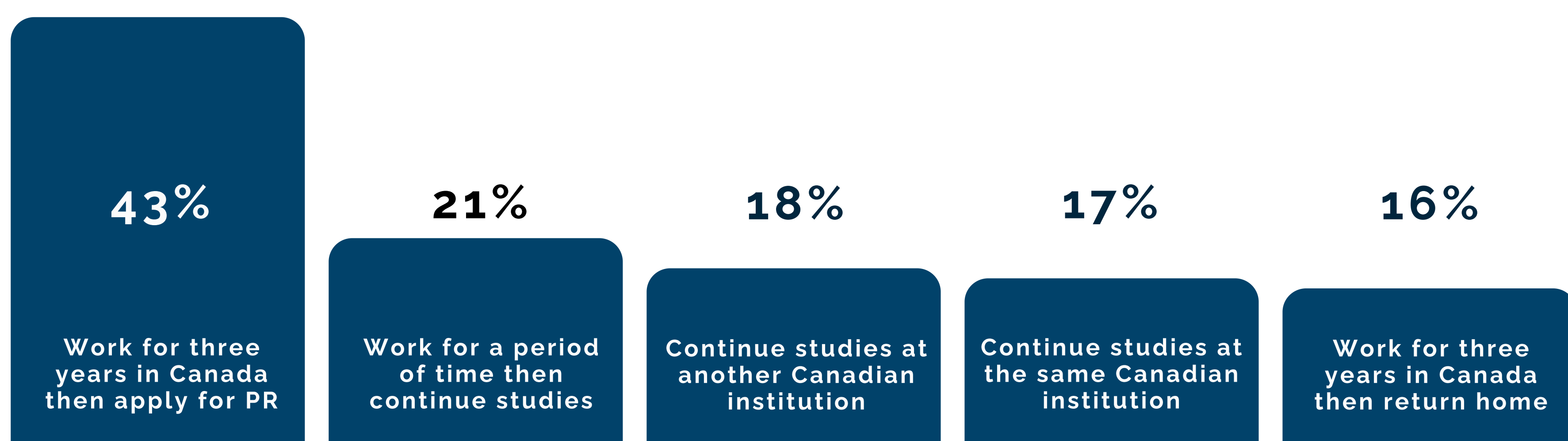
When respondents were asked to describe their post-graduation plans, the frequently cited response was to “work for up to three years in Canada and then pursue permanent residency” (43%). In addition, 33% of our respondents indicated that they are considering becoming entrepreneurs in Canada. Just under one in five respondents indicated that they planned to “work for up to three years in Canada and then return home”. While 21% planned to “work for a period of time and then resume their studies”, this represented a drop of 7% from ISS 2021 results. Eighteen percent expected to continue their studies either “at another Canadian institution” or at their “current institution” (17%).

Overall, female respondents were less likely to cite plans to continue their studies, while male respondents were more likely to return home after working for up to three years in Canada.

Respondents who reported being accompanied were more likely to work up to three years and then apply to become a permanent resident (57%) than unaccompanied respondents (40%). They were also slightly less likely to continue their studies at a Canadian institution.

One in every two Ph.D. respondents were the most likely to apply for permanent residency (PR) after working for three years in Canada. Respondents pursuing a bachelor's degree were the most likely to continue their studies after graduation (21% in their current institution; 25% at another Canadian institution).

POST-GRADUATION INTENTIONS



When looking at post-graduation intentions by respondents from the top five source countries, there are important variations. Respondents from the Philippines stand out when compared to the average: 73% reported that they intended to work for three years and apply for PR. They were also the least likely to continue their studies, either in Canada or elsewhere. One out of two respondents from Iran stated that they did not have any plans yet.

Less than 10% of respondents from Nigeria, Iran, and the Philippines plan to look for work in their home country. Over a quarter of French students intend to look for work in their home country after completing their program. Iranian (15%) and Indian (25%) respondents were the least likely to plan to work for three years and then apply for PR (compared to an average of 43%).

POST-GRADUATION INTENTIONS BY TOP SOURCE COUNTRIES	CHINA	FRANCE	IRAN	INDIA	NIGERIA	THE PHILIPPINES
Work for up to three years in Canada, then apply to become a permanent resident	45%	38%	15%	25%	44%	73%
Work for a period of time and continue studies at a later date	23%	11%	19%	20%	26%	21%
Continue my studies at another Canadian institution	25%	13%	2%	18%	17%	12%
Continue my studies at this institution	21%	17%	11%	19%	17%	10%
Work for up to three years in Canada before returning home	13%	20%	14%	17%	12%	24%
Look for work in my home country	13%	26%	8%	11%	9%	9%
I do not have any plans yet	9%	10%	50%	14%	8%	3%



7.2. INTENTIONS TO STAY IN CANADA

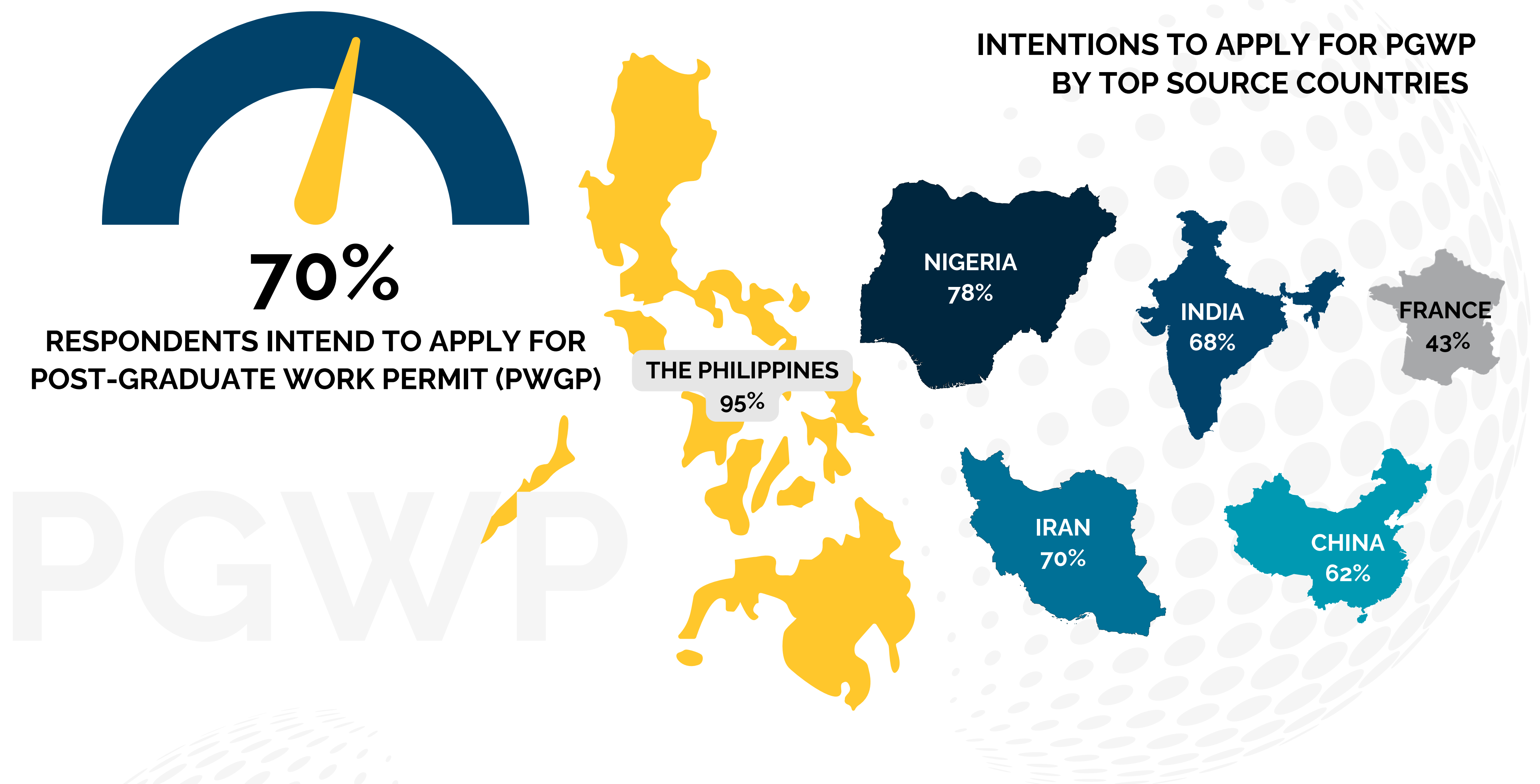
A substantial majority of respondents (70%) indicated they intended to apply for a PGWP, 7% said they had no plans to do so, and 20% indicated they were unsure. At the same time, 57% of respondents indicated they intended to apply for PR, 7% had no plans to do so, and over 30% were undecided. These numbers are relatively consistent with the responses from 2021.

Ninety-five percent of respondents from the Philippines indicated that they want to apply to PWGP.

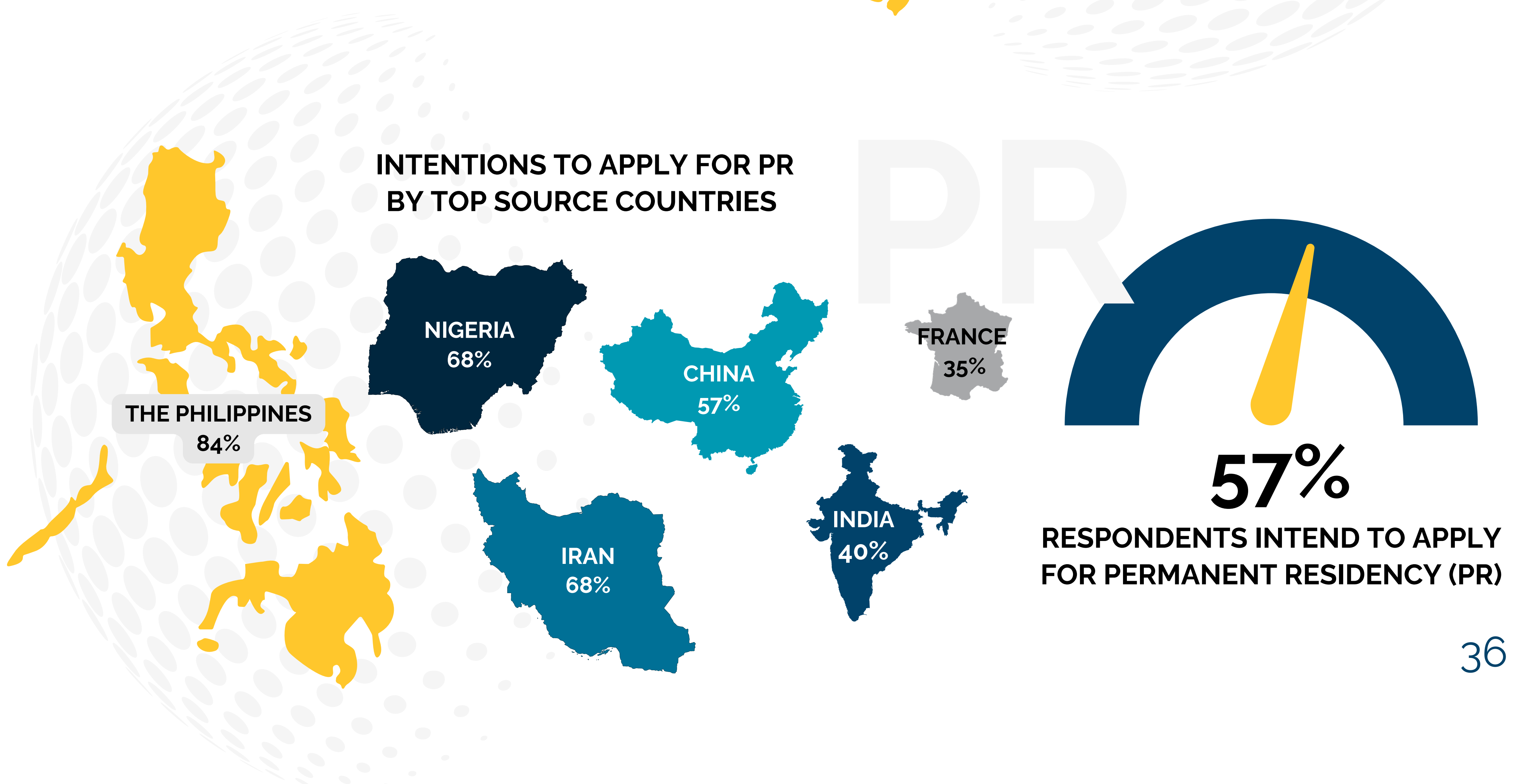
Interest is high for respondents from Nigeria (78%), Iran (70%) and India (68%), and lowest for respondents from France (43%).

As with PGWP, respondents from the Philippines were the most likely (84%) to pursue PR in Canada after completing their studies. Over half of the respondents from Nigeria (68%), Iran (68%) and China (57%) also indicated their intention to pursue PR. Respondents from India (40%) and France (35%) were the least likely to apply for PR.

INTENTIONS TO APPLY FOR PGWP BY TOP SOURCE COUNTRIES



INTENTIONS TO APPLY FOR PR BY TOP SOURCE COUNTRIES



7.3. LOCATION OF POST-GRADUATION STAY IN CANADA

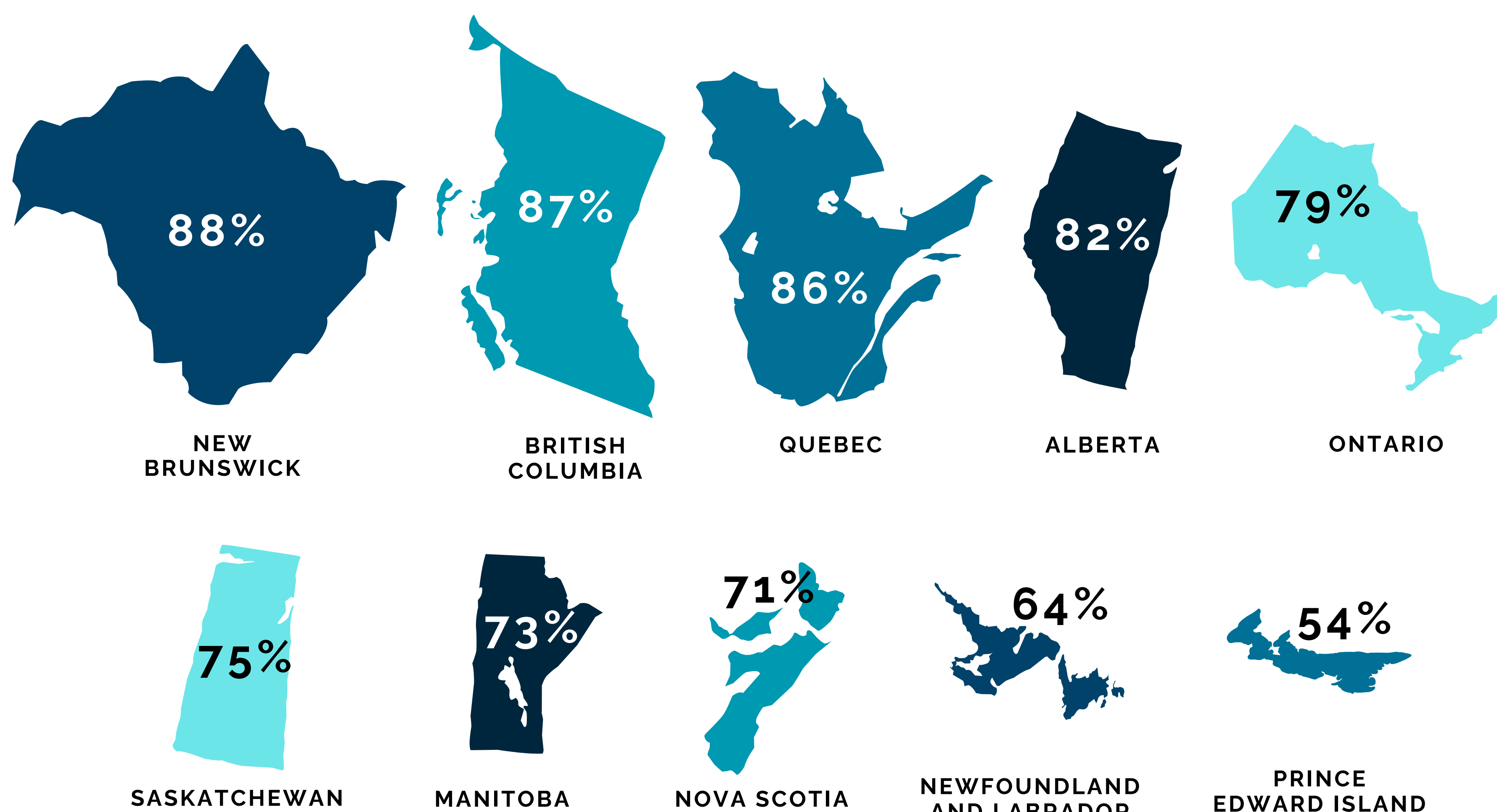
Ontario (33%), British Columbia (20%) and Quebec (9%) are the provinces where the most respondents indicated their intention to live after obtaining their PR. For graduate programs, the top three provinces were Ontario (24%), British Columbia (22%) and Quebec (17%). For certificate and diploma programs, the top three provinces were Ontario (41%), Alberta (17%) and British Columbia (15%).

The majority of respondents indicated wanting to stay in the province where they studied, with only small differences across regions.

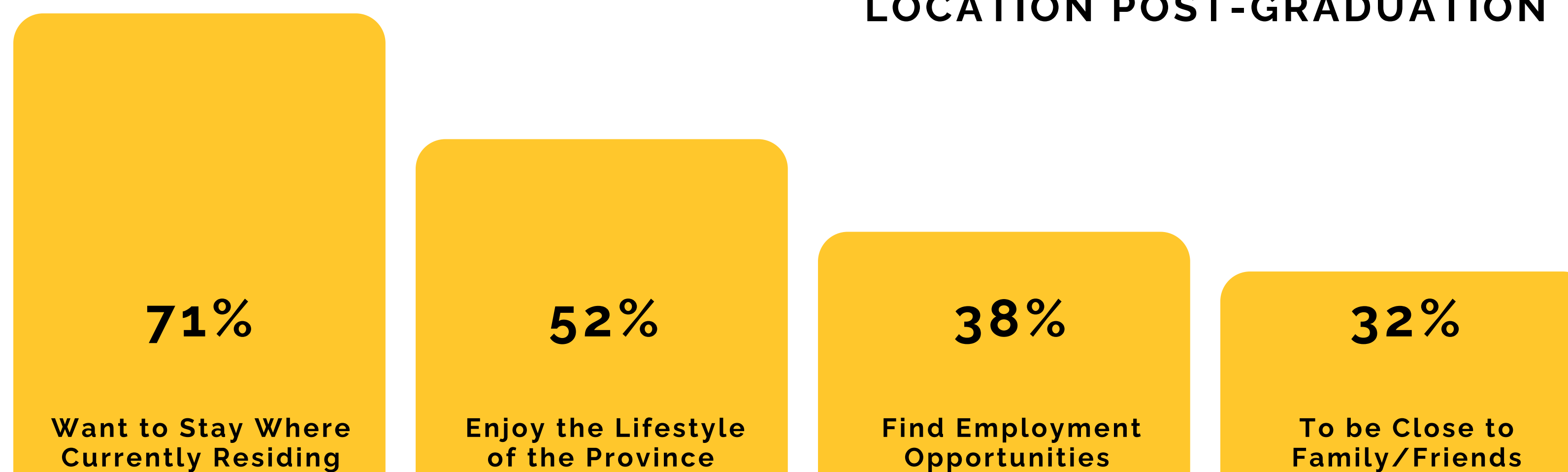
The province with the highest retention rate of graduates is New Brunswick (88%), closely followed by British Columbia (87%) and Quebec (86%).

When asked why they would like to live in the selected province, 71% of respondents noted that they currently reside there, 52% said that they enjoyed the lifestyle of the province, 38% cited employment opportunities, and 32% wanted to be close to family or friends.

INTENTION TO STAY IN PROVINCE OF STUDY POST-GRADUATION



MOTIVATION TO RESIDE IN LOCATION POST-GRADUATION



Conclusion

The current policy environment for international education (IE) in Canada is extremely fluid. While international enrolment in Canada continued to surge throughout the period captured in the 2023 ISS, recent federal government decisions have deliberately focused on capping the sector's growth.

Various rationales have been provided for this abrupt shift in federal policy to temporarily cap enrolment. These include providing time to review the sustainability of current IE policies and practices within the broader context of Canada's demographic imperatives and the affordable housing crisis; assessing the capacity of Canadian institutions and the communities that host them to deliver a quality IE experience to current and prospective international students; and weeding out "bad actors" who are jeopardizing Canada's global reputation as a destination of choice for international talent.

However compelling the reasons for this pause, it is hard to understate the potential long-term impacts of these short-term decisions on the future of Canada's IE sector. At the time of publication of this report in the fall of 2024, CBIE member institutions are already reporting a precipitous decline in forecasted international student enrolment in Canada for the fall and winter sessions.

Canada remains an appealing study destination. We are attracting a diverse and balanced mix of students. A strong majority of those enrolled express satisfaction with the quality and level of their host institution's support services, prior to and after arrival in Canada.

They also give a high overall rating to their Canadian study experience. Most report a strong feeling of "belonging" and of being "respected", and most would recommend their host institution as a study destination. Almost half are working part-time, helping alleviate labour shortages in key markets, and most plan to contribute to Canada after graduation, either as PR or via PGWP.

Unfortunately, there are some early and troubling signs of an erosion in Canada's standing as an attractive destination for IE.

A concerning number of international students are reporting instances of discrimination and harassment off campus and in the work environment. Mental health continues to be a problem for a significant minority of international students. And too many students continue to report feeling that their talents and skills are underused and under-appreciated by employers. More importantly, there has been a marked decline in two of the top five source countries for international students who would be willing to recommend Canada as a study destination.

The plan of action is clear: Canada's international education sector, host communities and governments need to work together to reverse this trend before our global reputation is irreversibly tarnished.

As noted in the introduction of this survey report, the 2023 ISS was completed against the backdrop of a post-COVID-19 surge in international enrolment in Canada and before recent federal actions to manage the sector's unprecedented growth. The next iteration of ISS will be especially important for decision makers, because it will fully incorporate these new developments. It will provide an opportunity to gauge the implications of recent federal policy changes for Canadian institutions that host international students, as well as for international students who arrived in Canada both before and after the changes were implemented. Assessing how these changes have affected Canada's attractiveness as a study destination, the impact they have had on overall enrolment, institutional viability and post-graduation work plans and intentions will be telling. The conclusions that are gleaned from these assessments should then be acted upon—swiftly and decisively. It is imperative that Canada gets it right.

Participating Institutions

ACSEDA SCHOOL OF MANAGEMENT
ALBERTA UNIVERSITY OF THE ARTS
ALGOMA UNIVERSITY
ALGONQUIN COLLEGE
ASSINIBOINE COMMUNITY COLLEGE
BISHOP'S UNIVERSITY
BOW VALLEY COLLEGE
BRANDON UNIVERSITY
BROCK UNIVERSITY
CAMBRIAN COLLEGE
CAMOSUN COLLEGE
CANADORE COLLEGE
CENTENNIAL COLLEGE
COLLEGE OF NEW CALEDONIA
COLLEGE OF THE ROCKIES
DALHOUSIE UNIVERSITY
ÉCOLE DE TECHNOLOGIE SUPÉRIEURE
GEORGE BROWN COLLEGE
GEORGIAN COLLEGE
HEC MONTRÉAL
HUMBER COLLEGE
INSTITUT DE TOURISME ET D'HÔTELLERIE
DU QUÉBEC
INSTITUT NATIONAL DE LA RECHERCHE
SCIENTIFIQUE
INTERNATIONAL COLLEGE OF MANITOBA
KING'S UNIVERSITY COLLEGE
LA CITÉ COLLÉGIALE
LANGARA COLLEGE
LETHBRIDGE COLLEGE
MACEWAN UNIVERSITY
MANITOBA INSTITUTE OF TRADES & TECHNOLOGY
MCMASTER UNIVERSITY
MEDICINE HAT COLLEGE
MEMORIAL UNIVERSITY OF NEWFOUNDLAND
MOHAWK COLLEGE
MOUNT ALLISON UNIVERSITY
MOUNT SAINT VINCENT UNIVERSITY
NEW BRUNSWICK COMMUNITY COLLEGE
NIAGARA COLLEGE CANADA
NIAGARA COLLEGE TORONTO
NORQUEST COLLEGE
NORTHERN ALBERTA INSTITUTE OF TECHNOLOGY
NORTHERN COLLEGE
NORTHWESTERN POLYTECHNIC
OCAD UNIVERSITY
POLYTECHNIQUE MONTRÉAL
RED RIVER COLLEGE POLYTECHNIC
ROYAL ROADS UNIVERSITY
SAINT MARY'S UNIVERSITY
SASKATCHEWAN POLYTECHNIC
SENECA POLYTECHNIC
SIMON FRASER UNIVERSITY
ST. LAWRENCE COLLEGE
THE UNIVERSITY OF WINNIPEG
THOMPSON RIVERS UNIVERSITY
TORONTO METROPOLITAN UNIVERSITY
UNIVERSITÉ DE L'ONTARIO FRANÇAIS
UNIVERSITÉ DE MONCTON
UNIVERSITÉ DE MONTRÉAL
UNIVERSITÉ DE SAINT-BONIFACE
UNIVERSITÉ DE SHERBROOKE
UNIVERSITY OF OTTAWA
UNIVERSITÉ DU QUÉBEC À TROIS-RIVIÈRES
UNIVERSITÉ DU QUÉBEC EN ABITIBI-
TÉMISCAMINGUE
UNIVERSITÉ DU QUÉBEC EN OUTAOUAIS
UNIVERSITY OF ALBERTA
UNIVERSITY OF BRITISH COLUMBIA
UNIVERSITY OF GUELPH
UNIVERSITY OF LETHBRIDGE
UNIVERSITY OF MANITOBA
UNIVERSITY OF PRINCE EDWARD ISLAND
UNIVERSITY OF REGINA
UNIVERSITY OF SASKATCHEWAN
UNIVERSITY OF THE FRASER VALLEY
UNIVERSITY OF VICTORIA
VANCOUVER COMMUNITY COLLEGE
VANCOUVER ISLAND UNIVERSITY
WESTERN UNIVERSITY
WILFRID LAURIER UNIVERSITY
YORK UNIVERSITY



Canadian Bureau for
International Education



Canadian Bureau for International Education
220 Laurier Avenue West, Suite 1550
Ottawa, Ontario, Canada K1P 5Z9
www.cbie.ca

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