From the Federal Advisory Panel to Recruitment Channels – Research and Policy Perspectives

The Illuminate Consulting Group

29 October 2013

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AGENDA

Housekeeping

Advisory Panel on Canada's International Education Strategy

International Student Recruitment: Global, Canada, and Nova Scotia

Channel Perspectives

International Student Tuition Fees

Value-Added Factors

Discussion

HOUSEKEEPING

- **The presentation is geared for about 60 minutes. About 60 minutes are allocated for discussion.**

- **The presentation will be made available as a PDF file.**

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INTERNATIONAL EDUCATION STRATEGY ADVISORY PANEL

- In Budget 2011, the Government of Canada announced funding of CAD 10 million over two years for the development and implementation of an International Education Strategy.

- Budget stated that an expert advisory panel would be called together with a mandate to make recommendations on International Education Strategy to "reinforce Canada as a country of choice to study and conduct world-class research".

- The Advisory Panel on Canada's International Education Strategy was established in October 2011 with members from across Canada.

- The panel's report and recommendations were published in August 2012.

INTERNATIONAL EDUCATION STRATEGY ADVISORY PANEL
Process

- **The panel reached its final recommendations through a three-step engagement process to hear from institutions in all sectors across the country.**
- **Consultation phase: Received 143 written submissions.**
- **Engagement phase: 138 participants in seven roundtables in six cities.**
- **Collaboratory: Brought together 57 participants to help develop a draft set of recommendations.**
- **Benchmarking mission to China and India to validate and refine findings.**
- **Commissioned research to inform recommendations including reports and presentations from ICG.**

INTERNATIONAL EDUCATION STRATEGY ADVISORY PANEL
Insights

- **Highly consultative approach to developing recommendations agreed upon from the outset.**
- **Early recognition that the strategy needed to extend beyond a focus on post-secondary institutions.**
- **Necessity of balancing aspirational goals with political and economic realities.**
- **Importance of focus and targeted allocation of resources.**

INTERNATIONAL EDUCATION STRATEGY ADVISORY PANEL
Recommendations

1. Double the number of international students choosing Canada by 2022.
2. Introduce an International Mobility Program for Canadian Students to serve 50,000 students per year by 2022.
3. Make internationalizing education in Canada a strategic component of Government of Canada official policies and plans.
4. Create a Council on International Education and Research to provide policy advice to the ministers of International Trade, Finance, Citizenship and Immigration, and Industry.
5. Maintain and enhance the quality of the education systems; ensure sustainability.
6. Focus Canada's promotional efforts on a limited number of priority markets for targeted resource allocation.
7. Increase marketing of Canada's brand.
8. Develop a sophisticated and comprehensive e-communication system that will serve as a national portal for international students interested in Canada.

INTERNATIONAL EDUCATION STRATEGY ADVISORY PANEL
Recommendations (continued)

9. Brand Canada through scholarships for international undergraduate students.

10. Regroup grants and scholarships available to international graduate students and post-doctoral fellows under one label/brand, with a focus on priority areas aligned with Canada's innovation and prosperity agenda.

11. Develop comprehensive and multifaceted bilateral agreements with priority countries that focus on all aspects of graduate education and research, supported by appropriate levels of funding.

12. Improve education visa processing to provide consistent and timely processing of high-quality candidates.

13. Expand and facilitate comprehensive training for staff at Canadian embassies and offices abroad on Canada's diverse education offerings and study pathways. Training opportunities should also be available for stakeholders to gain a deeper understanding of both the programs and cultural support required by international students.

14. Support the expansion and promotion of the existing Canada Experience Class program to contribute to Canada's skilled immigrant and labour market needs.

INTERNATIONAL EDUCATION STRATEGY ADVISORY PANEL
Implications for Nova Scotia

- **Goal of increased international student enrollment in all parts of the country.**
- **Recognition of regional differences in target markets and sectors for enrollment.**
- **Where applicable, alignment of institutional/provincial target markets with federal priority markets.**
- **Potential increase in opportunities for undertaking professional development and acquiring market intelligence.**

How is NS taking advantage of these opportunities?

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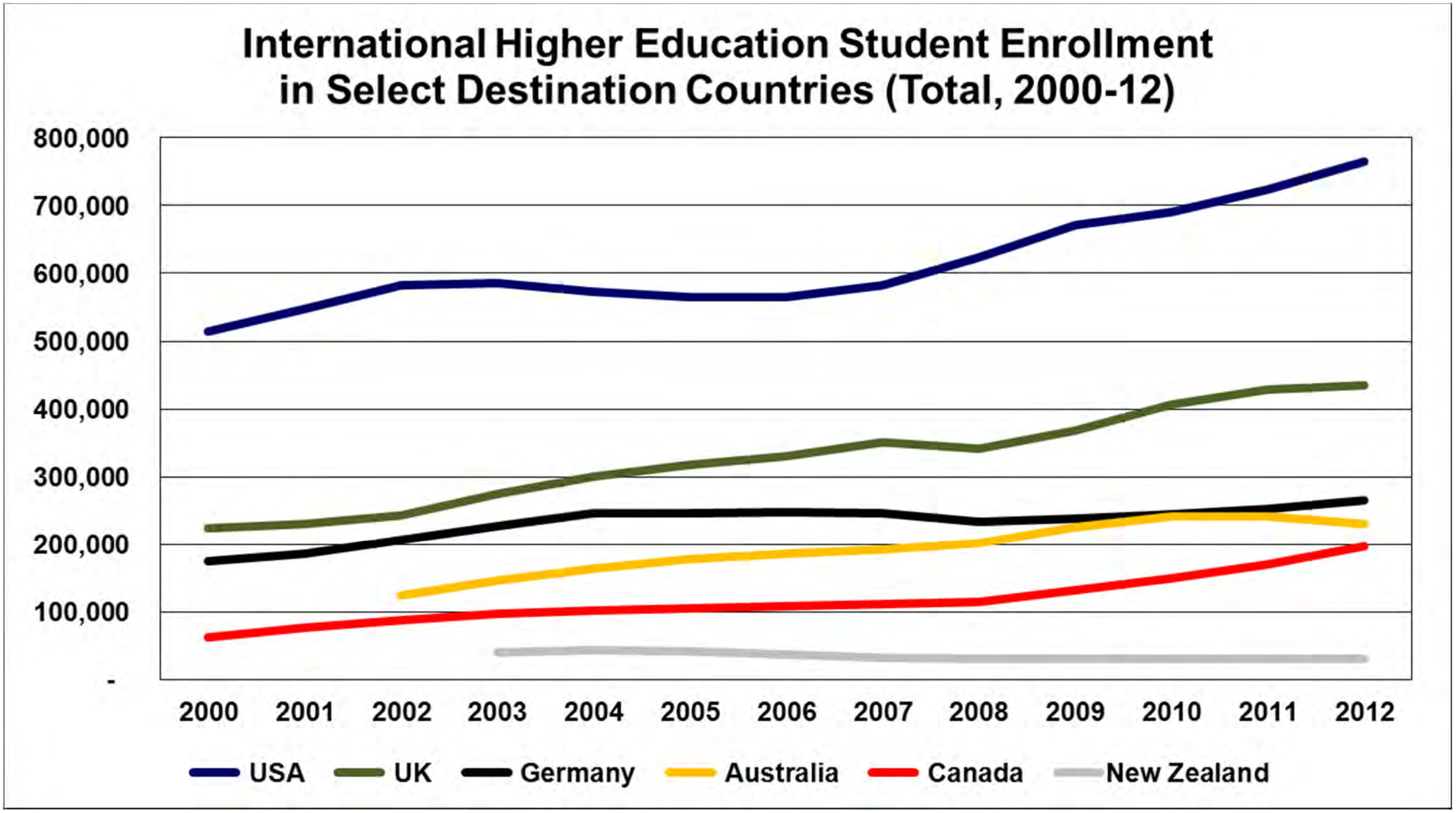
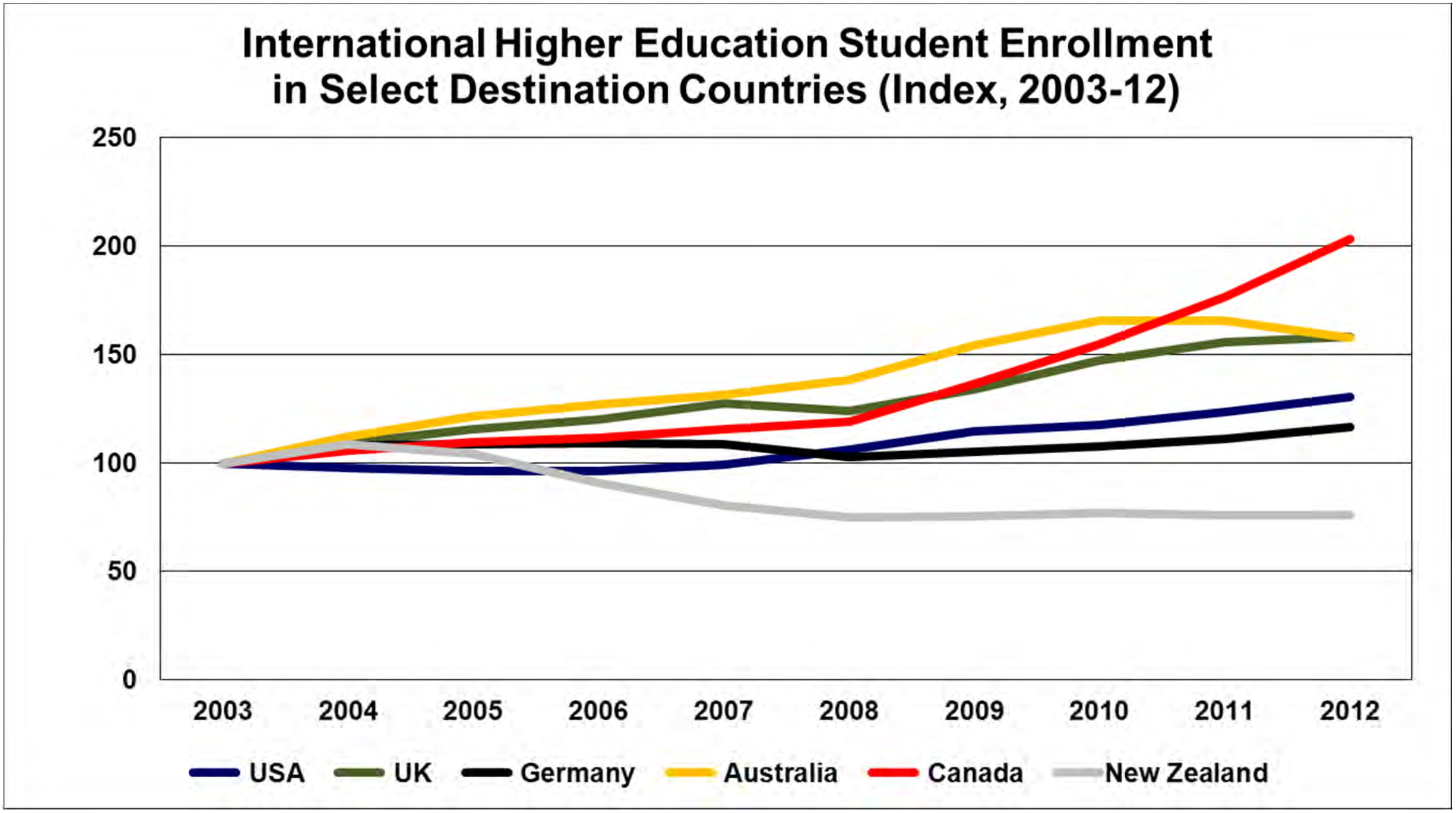
INTERNATIONAL HIGHER EDUCATION STUDENTS IN SELECT DESTINATION COUNTRIES



Canada and US are growing strongly

Notes: Select 2000 to 2002 data are not displayed owing to breaks in time series (here: Australia and New Zealand).
Source: AEI, CIC, DAAD/HIS, ENZ, HESA, IIE.

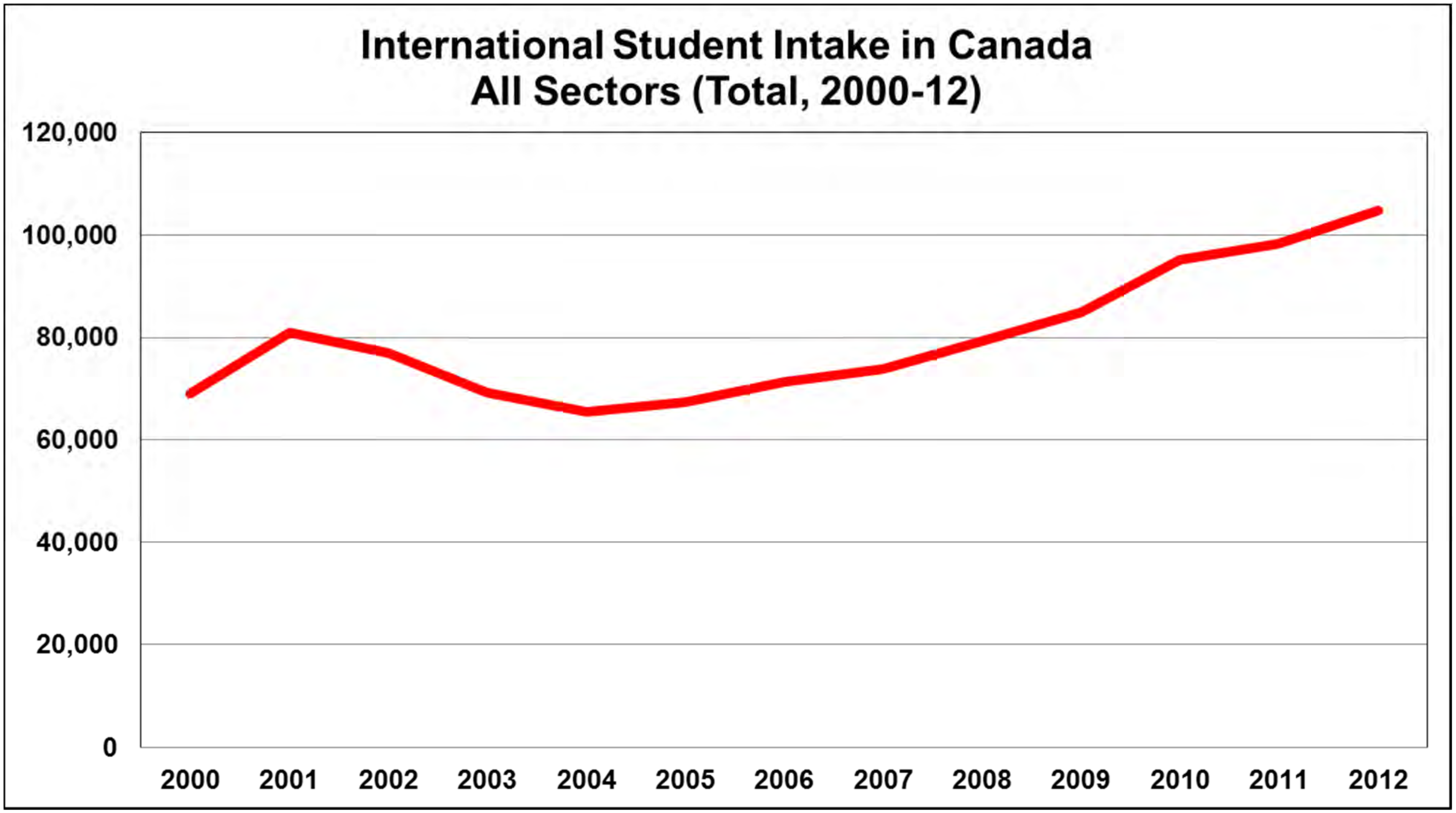
INTERNATIONAL HIGHER EDUCATION STUDENTS IN SELECT DESTINATION COUNTRIES



Canada has outpaced competitors since 2009

Notes: Index is set at 100 for 2003.
Source: AEI, CIC, DAAD/HIS, ENZ, HESA, IIE.

CANADA: NATIONAL TRENDS (INTAKE)



Intake exceeded 100,000 in 2012 for the first time

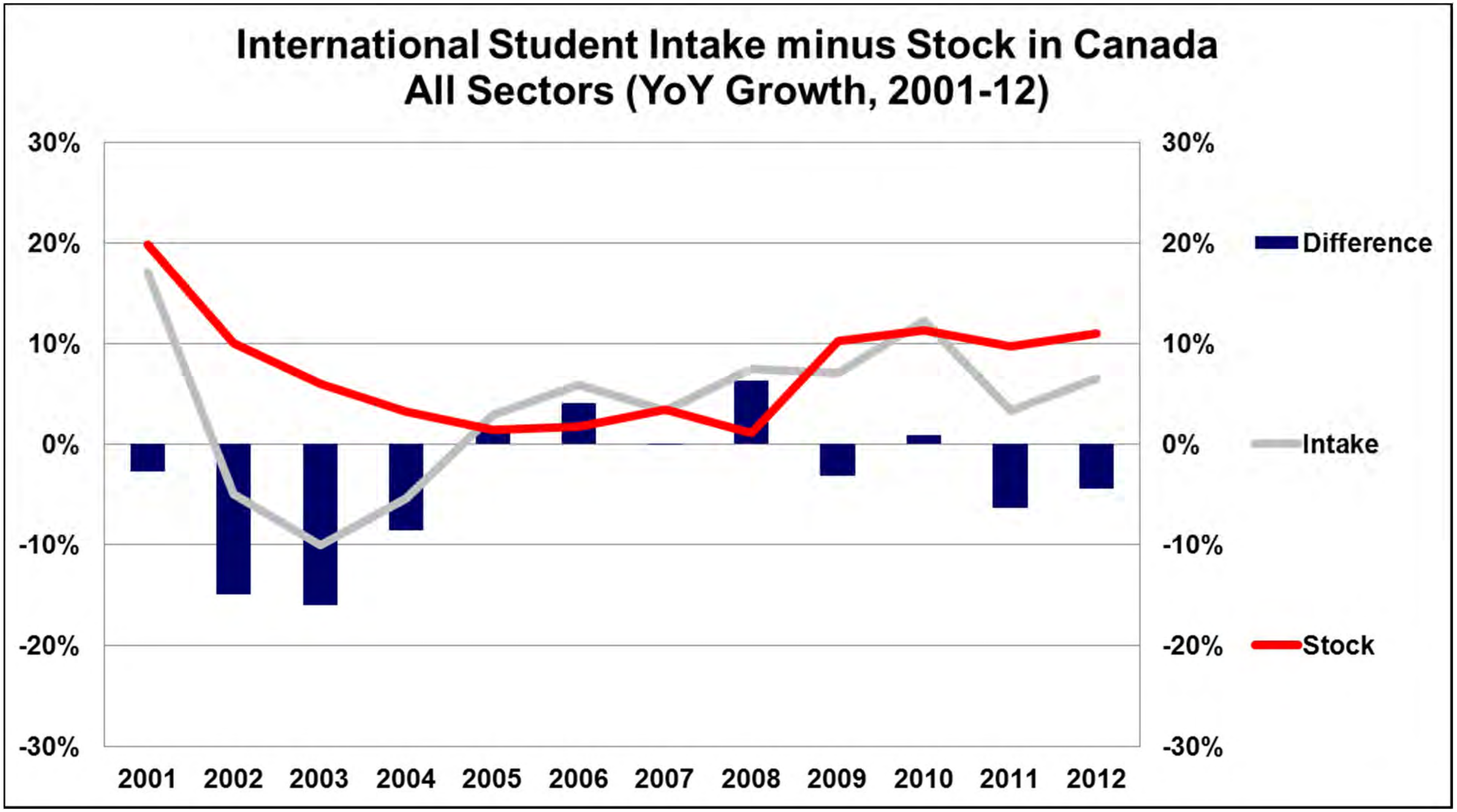
Source: CIC.

CANADA: NATIONAL TRENDS (ENROLLMENT)

Enrollments exceeded 250,000 for the first time in 2012

Source: CIC.

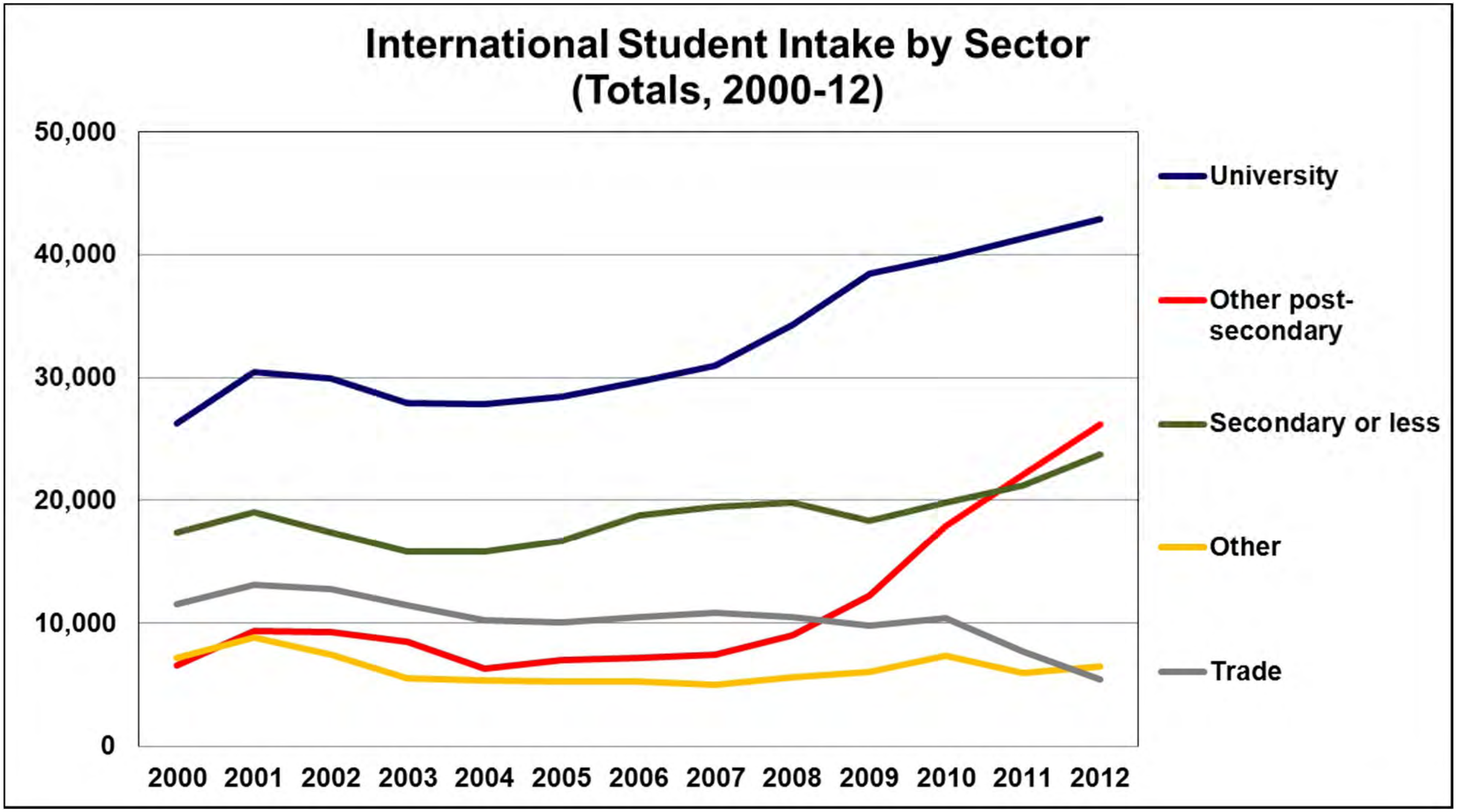
CANADA: NATIONAL TRENDS (INTAKE MINUS ENROLLMENT)



Intake growth slow down presages stock growth slow down

Notes: Bars depict year-over-year intake growth rate minus stock growth rate.
Source: CIC.

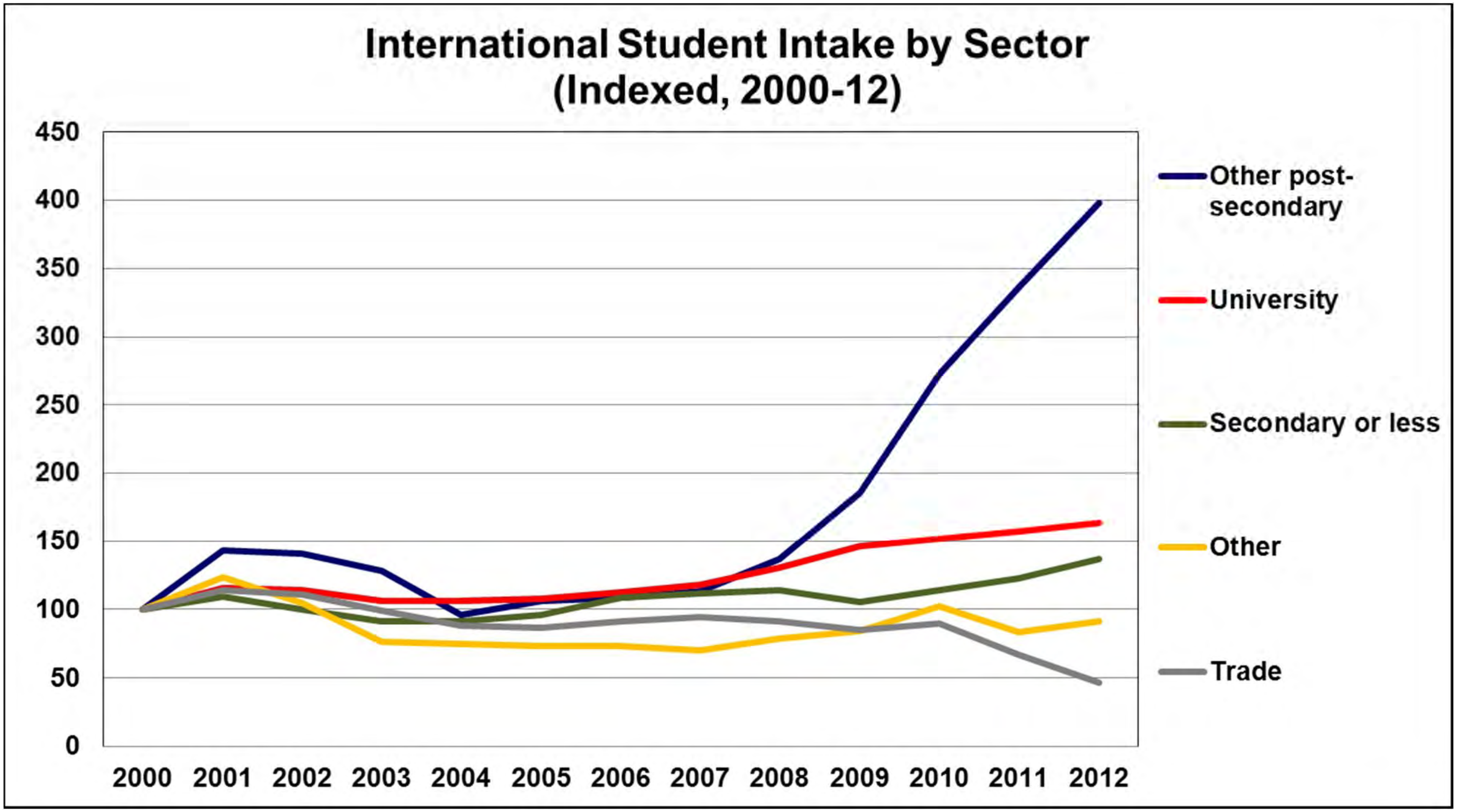
CANADA: SECTORAL TRENDS (INTAKE)



Intake growth is driven by the other post-secondary (college) sector

Notes: Excludes the "Level of study not stated" and "Gender not stated" categories.
Source: CIC.

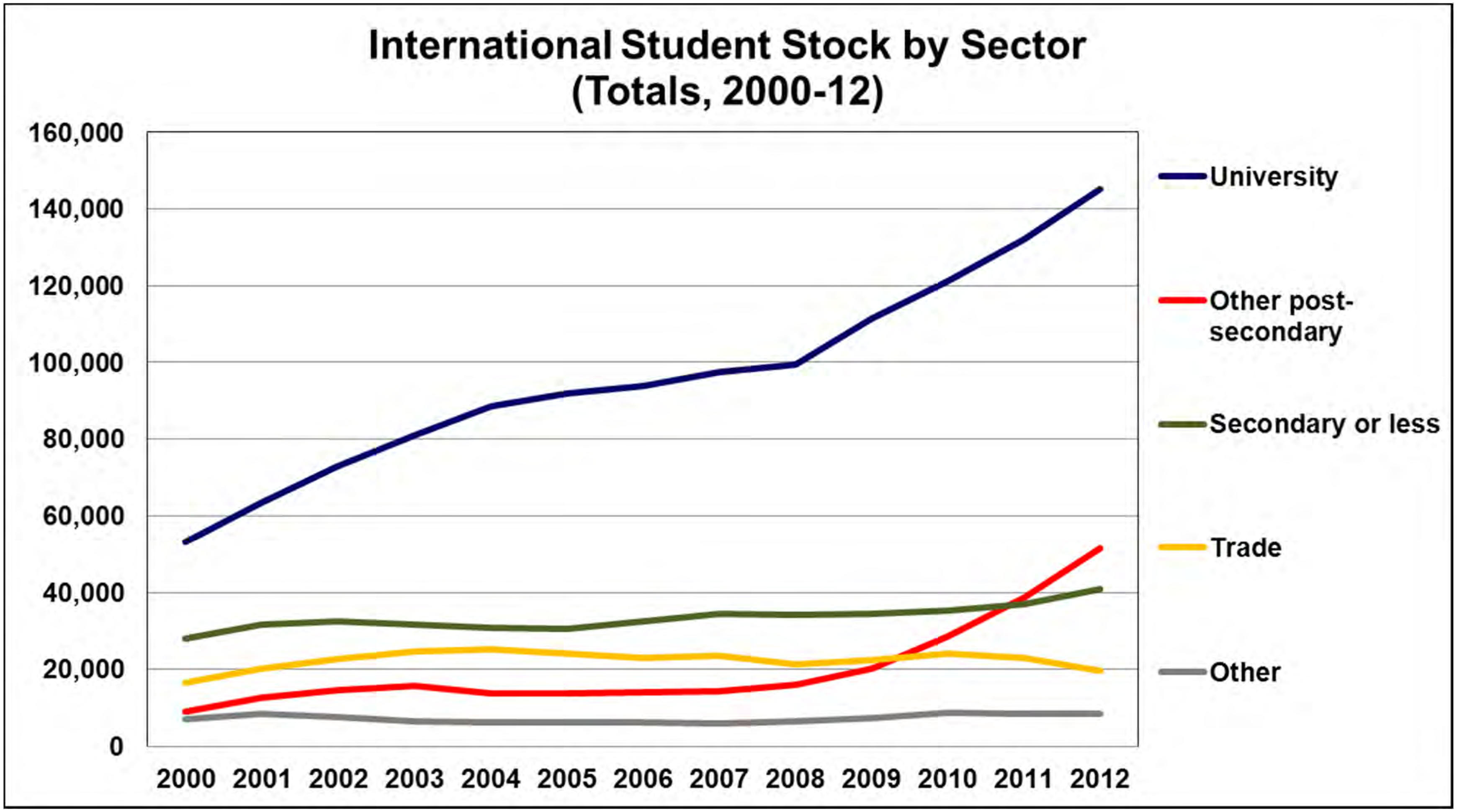
CANADA: SECTORAL TRENDS (INTAKE)



Other Post-Secondary (colleges) is experiencing rapidly growing intake

Notes: Excludes the “Level of study not stated” and “Gender not stated” categories.
Source: CIC.

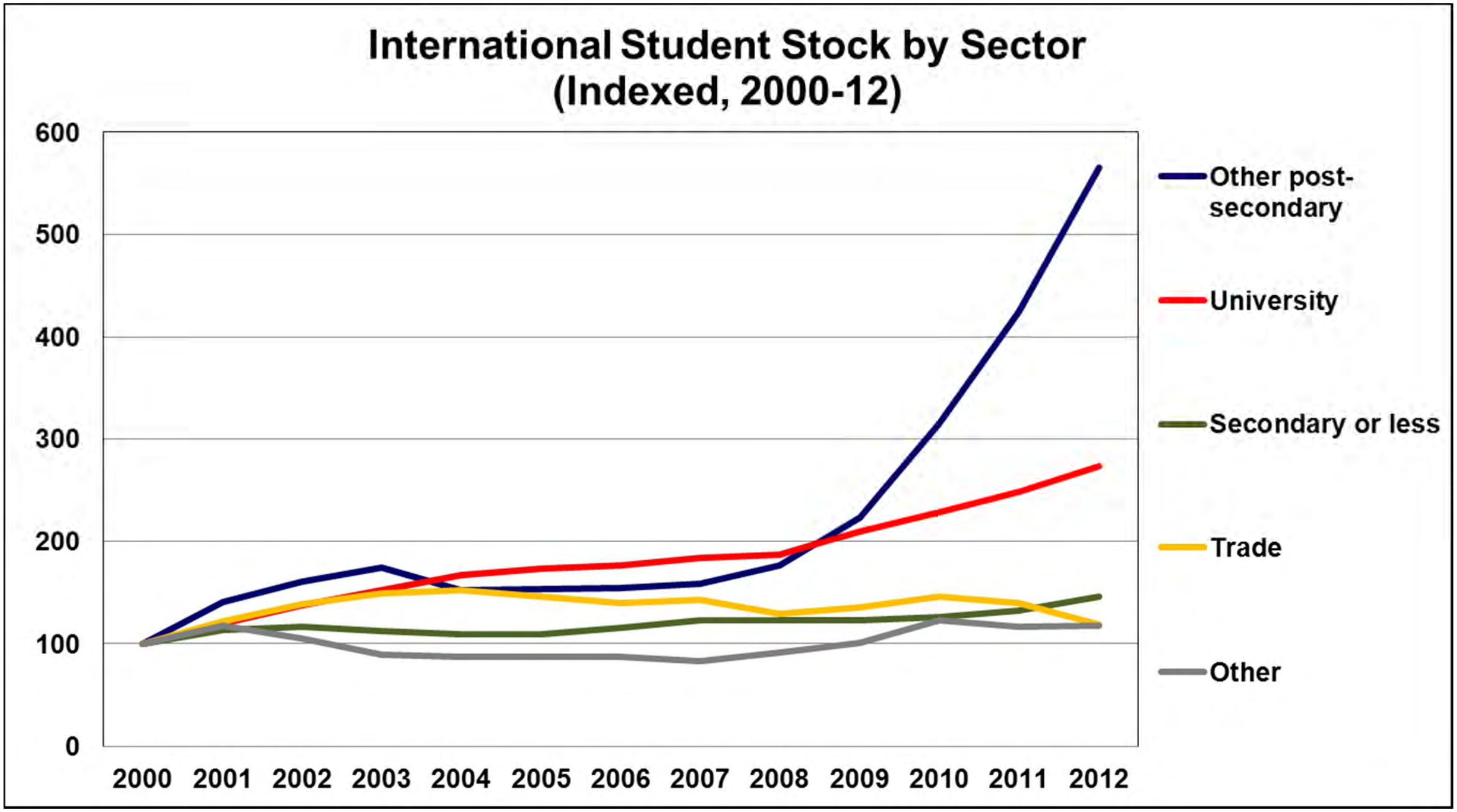
CANADA: SECTORAL TRENDS (ENROLLMENT)



Universities drive overall enrollment, colleges are growing strongly

Notes: Excludes the “Level of study not stated” and “Gender not stated” categories.
Source: CIC.

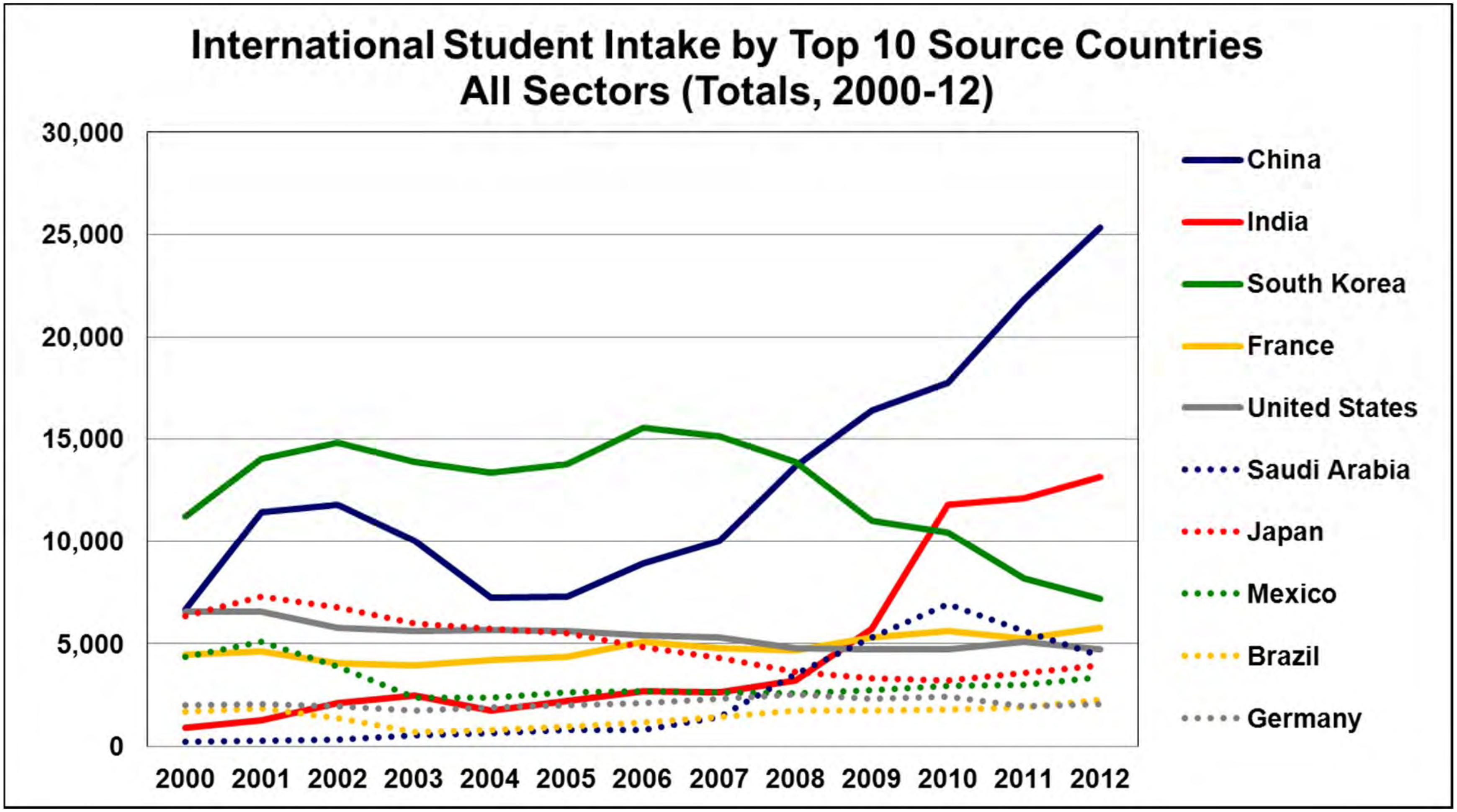
CANADA: SECTORAL TRENDS (ENROLLMENT)



College enrollments have more than tripled since 2008

Notes: Excludes the “Level of study not stated” and “Gender not stated” categories.
Source: CIC.

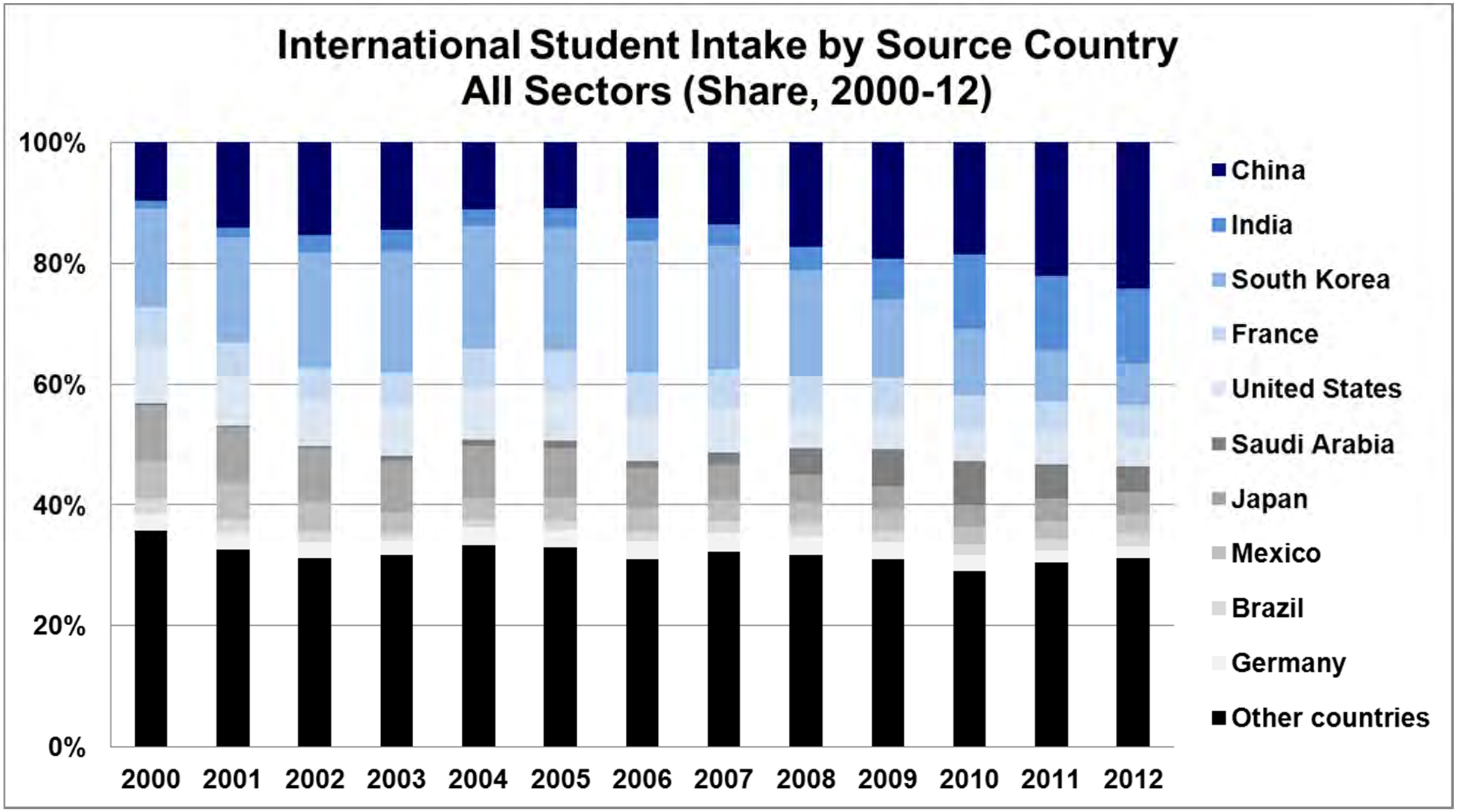
CANADA: SOURCE COUNTRY TRENDS (INTAKE)



China and India account for 82.3 percent of intake growth since 2009

Source: CIC.

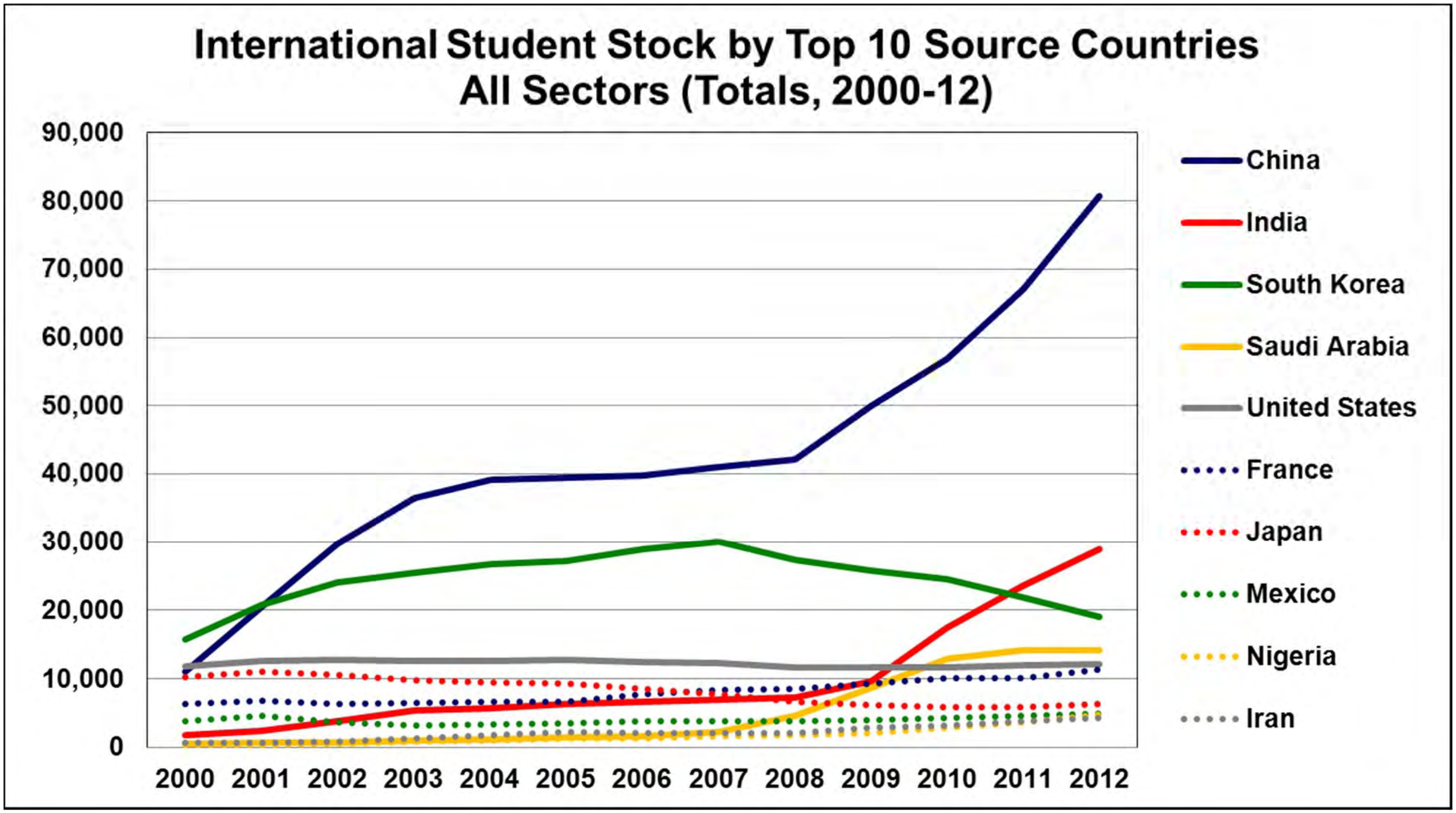
CANADA: SOURCE COUNTRY TRENDS (INTAKE)



Top 3 source countries' intake share has increased notably

Source: CIC.

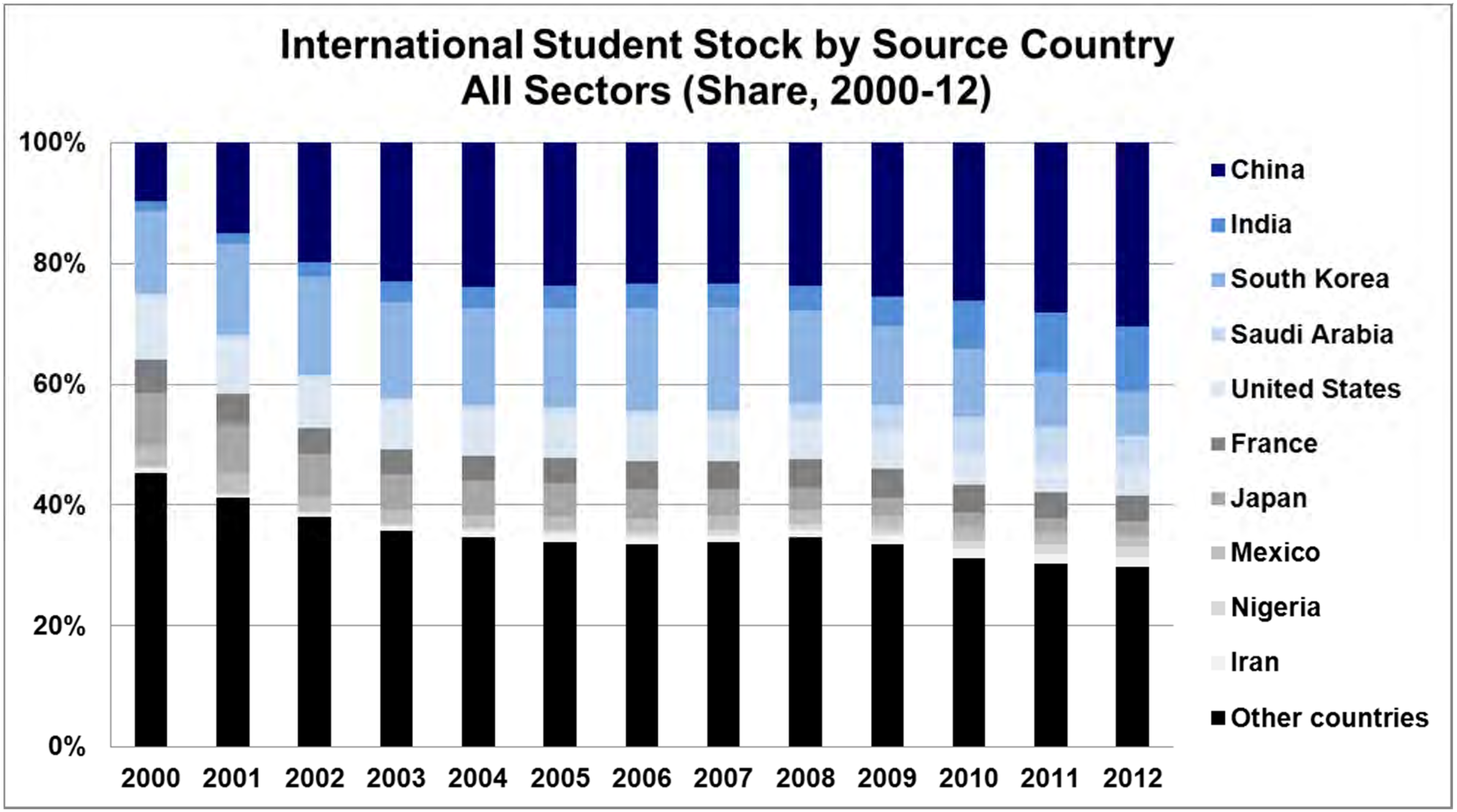
CANADA: SOURCE COUNTRY TRENDS (ENROLLMENT)



China's enrollment share increased from 9.7 to 30.4 percent

Source: CIC.

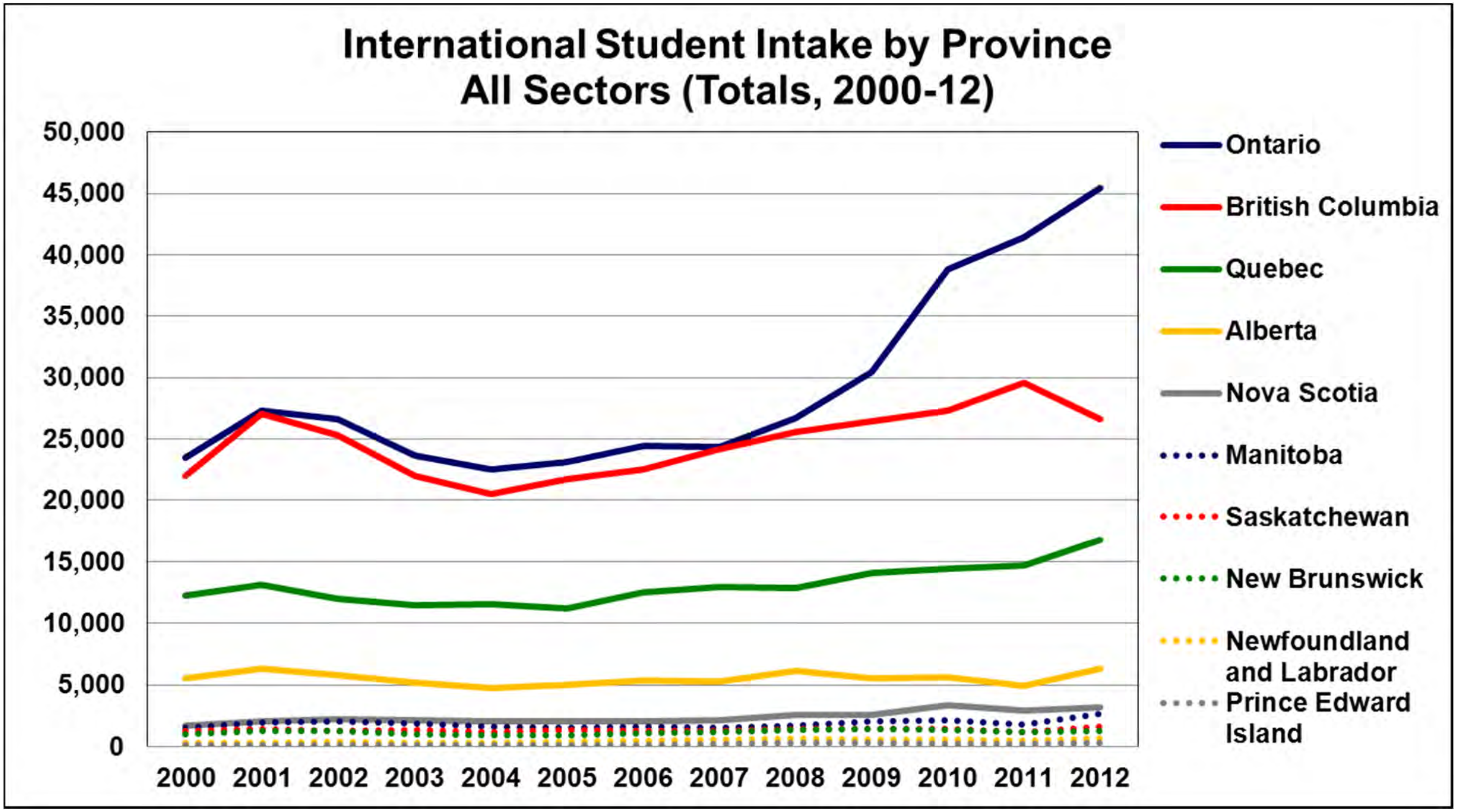
CANADA: SOURCE COUNTRY TRENDS (ENROLLMENT)



Top 5 sending countries account for 58.4 percent of enrollments (46.2 in 2000)

Source: CIC.

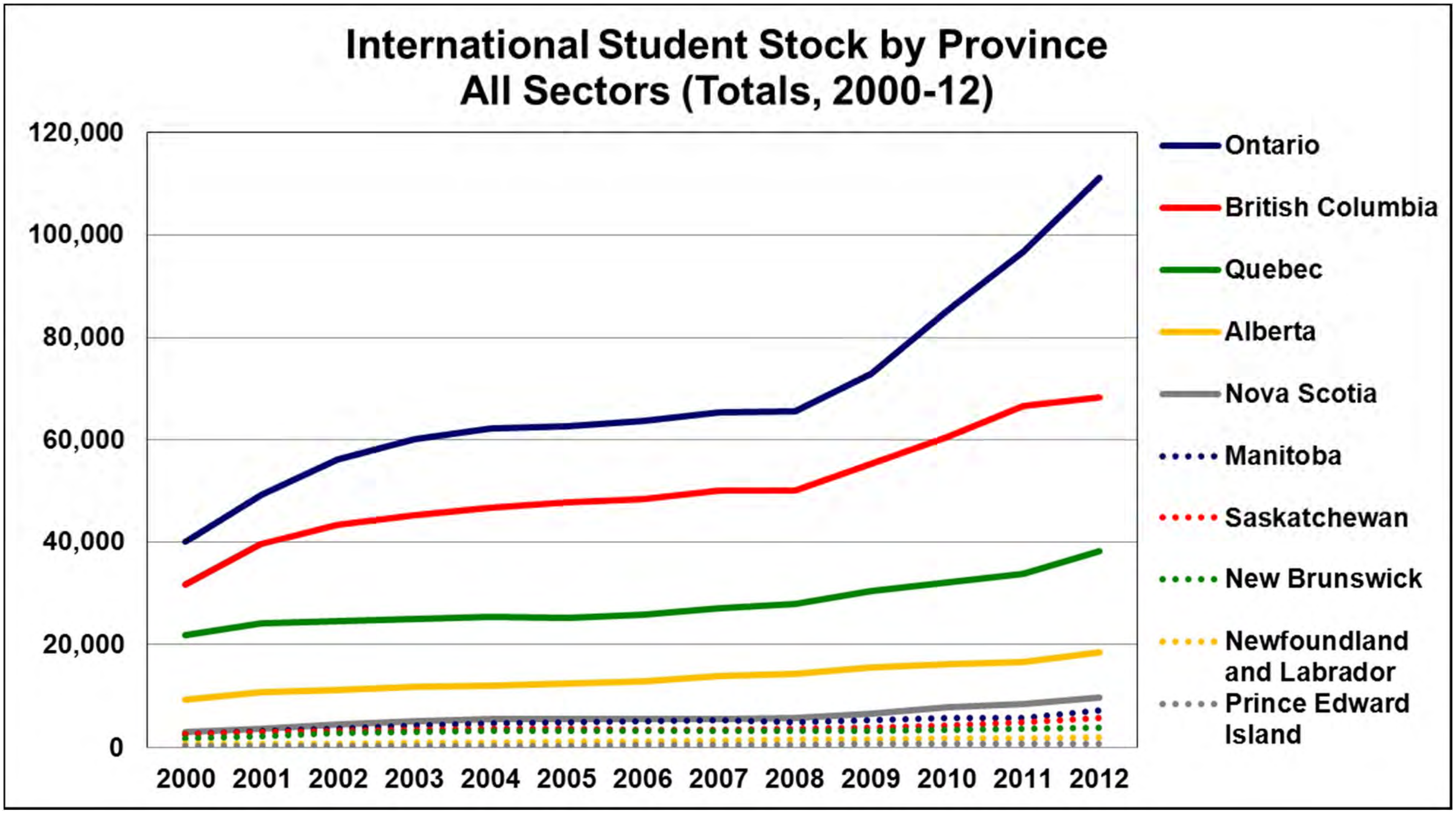
CANADA: PROVINCIAL TRENDS (INTAKE)



Nova Scotia holding fifth place ahead of surging Manitoba

Notes: Excludes Northwest Territories, Nunavut, Yukon, and “Province or territory not stated”.
Source: CIC.

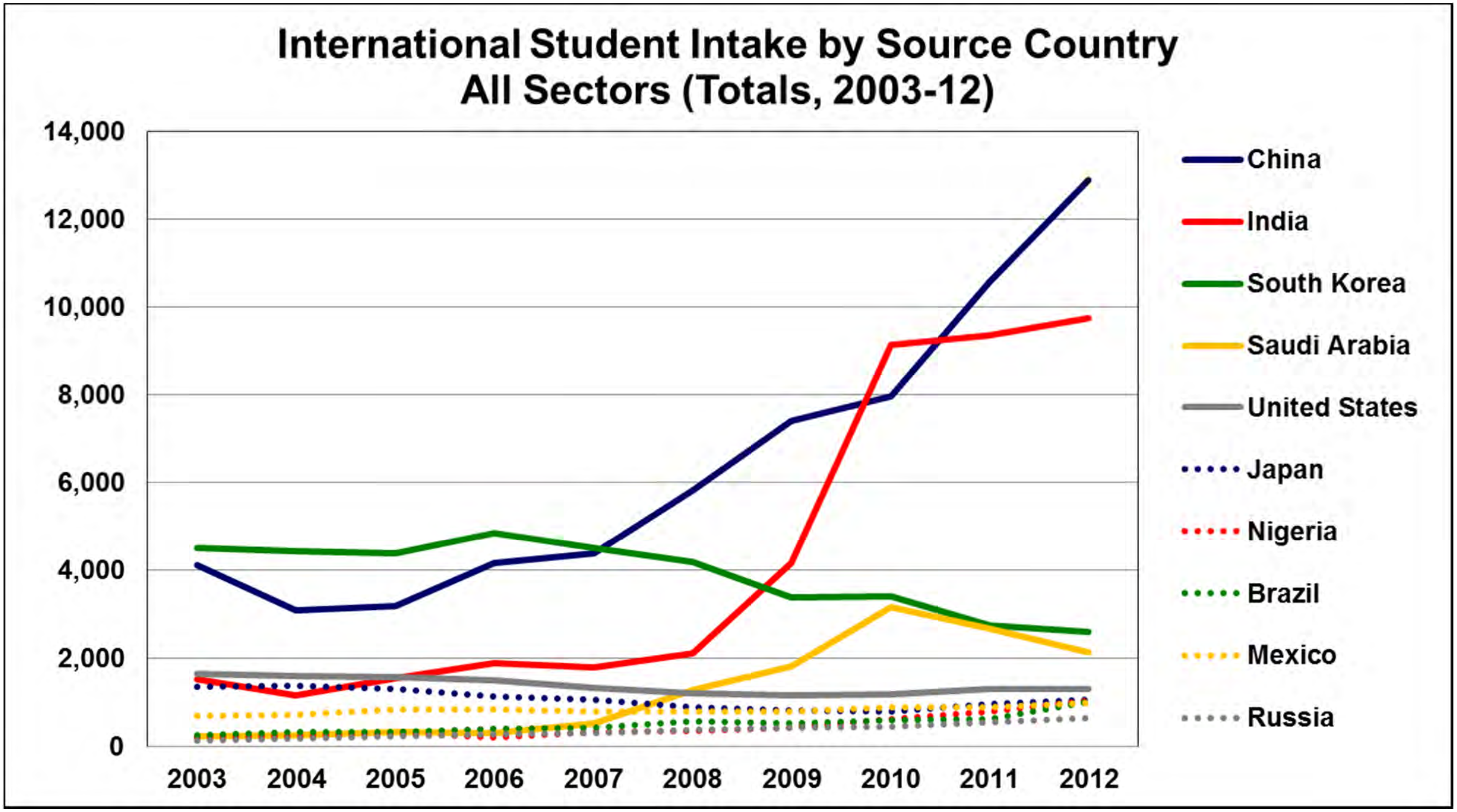
CANADA: PROVINCIAL TRENDS (ENROLLMENT)



Ontario, British Columbia, and Quebec account for 82 percent of enrollments

Notes: Excludes Northwest Territories, Nunavut, Yukon, and "Province or territory not stated".
Source: CIC.

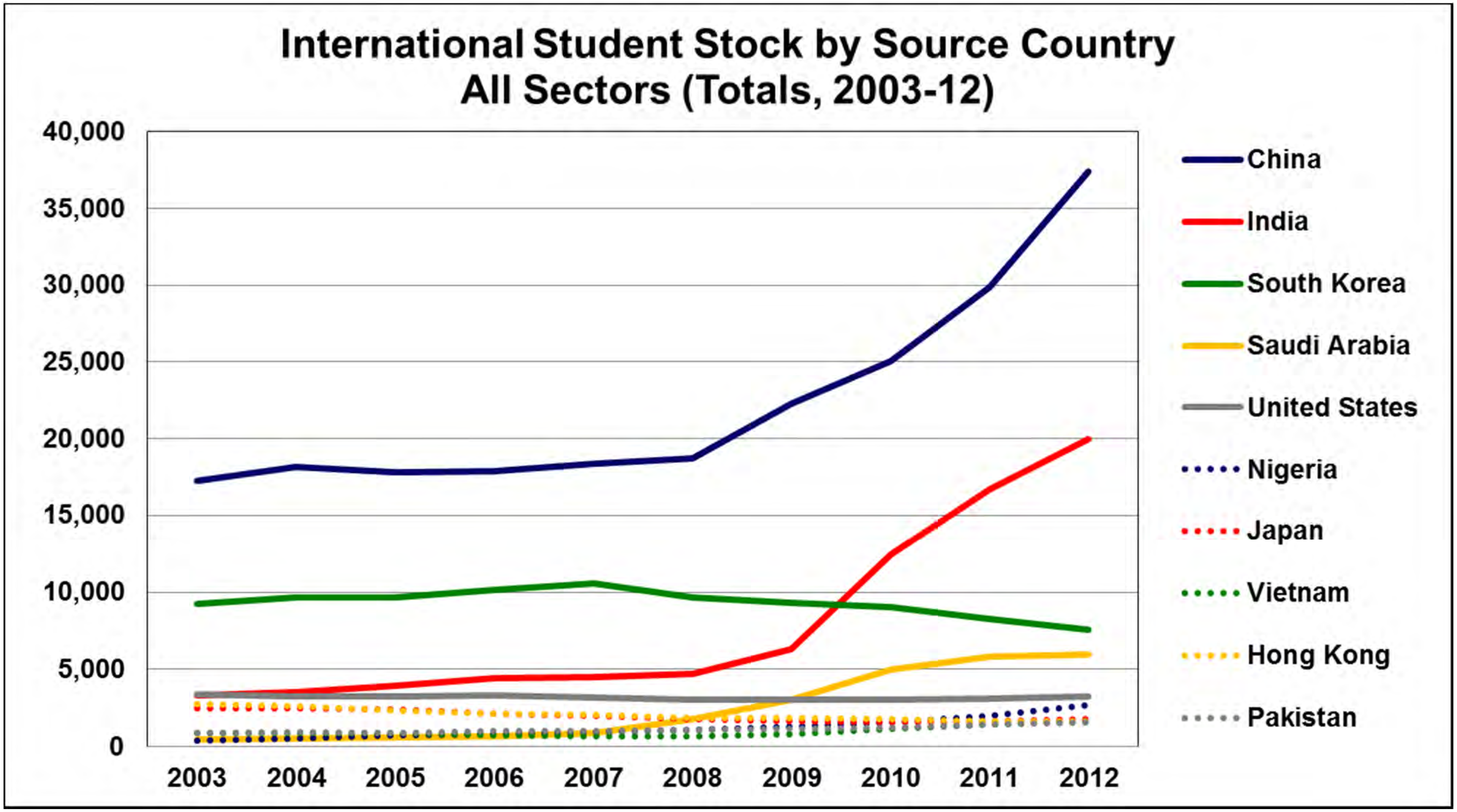
ONTARIO: SOURCE COUNTRY TRENDS (INTAKE)



China and India dominate; Korea, Saudi Arabia, and US are declining

Source: CIC.

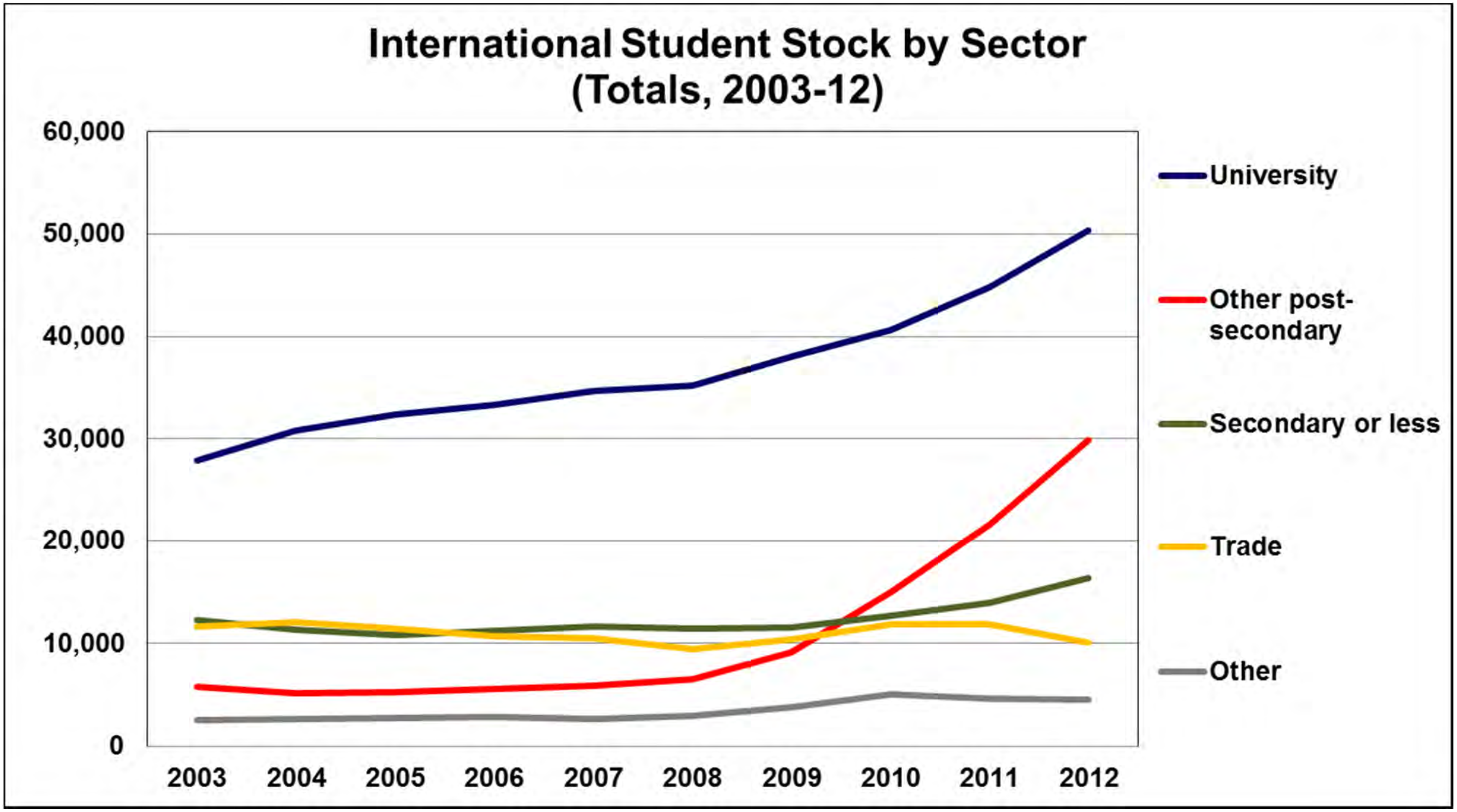
ONTARIO: SOURCE COUNTRY TRENDS (ENROLLMENT)



China still leads Ontario enrollment by a wide margin

Source: CIC.

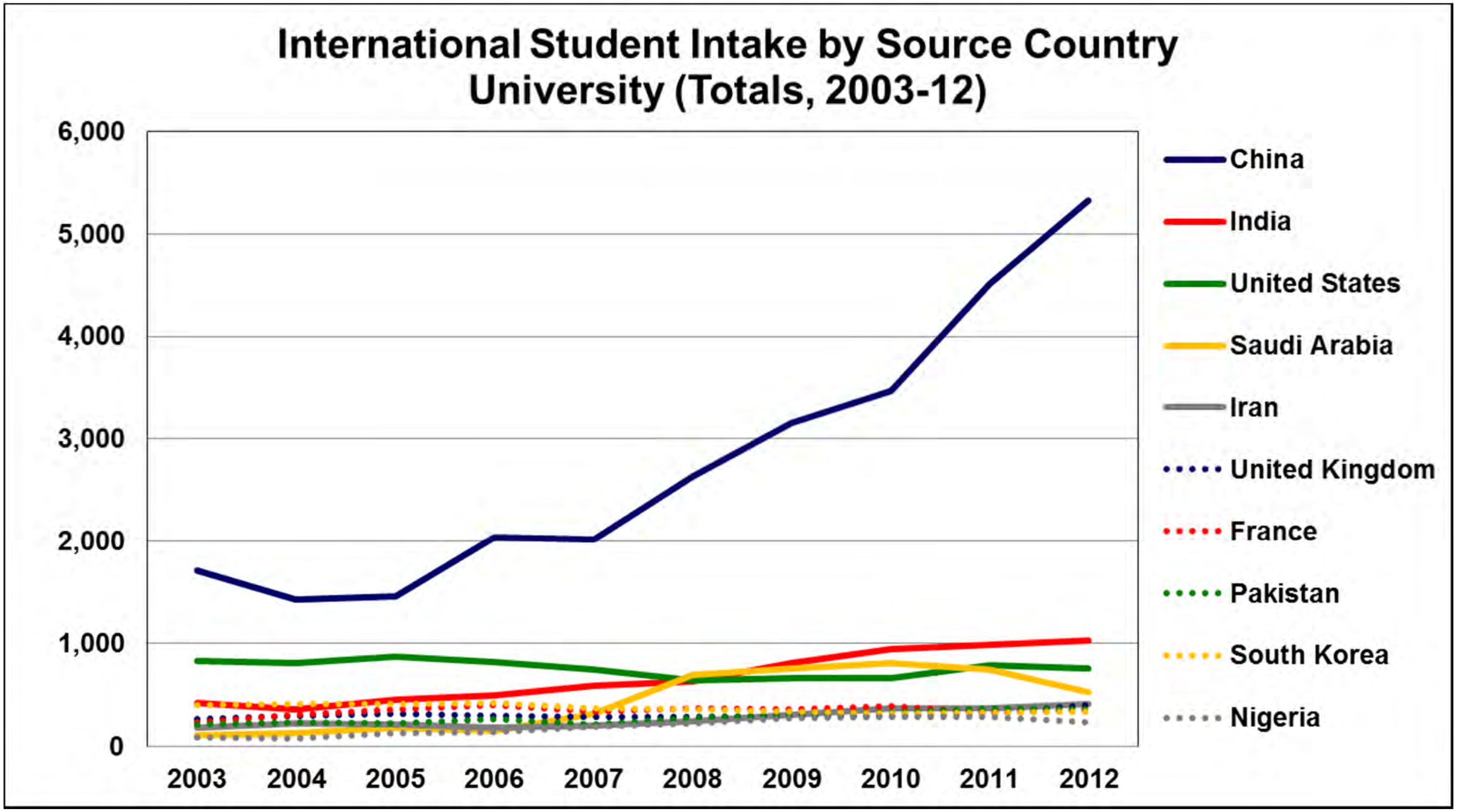
ONTARIO: SECTORAL TRENDS (ENROLLMENT)



Universities remain the driver of enrollment for now

Source: CIC.

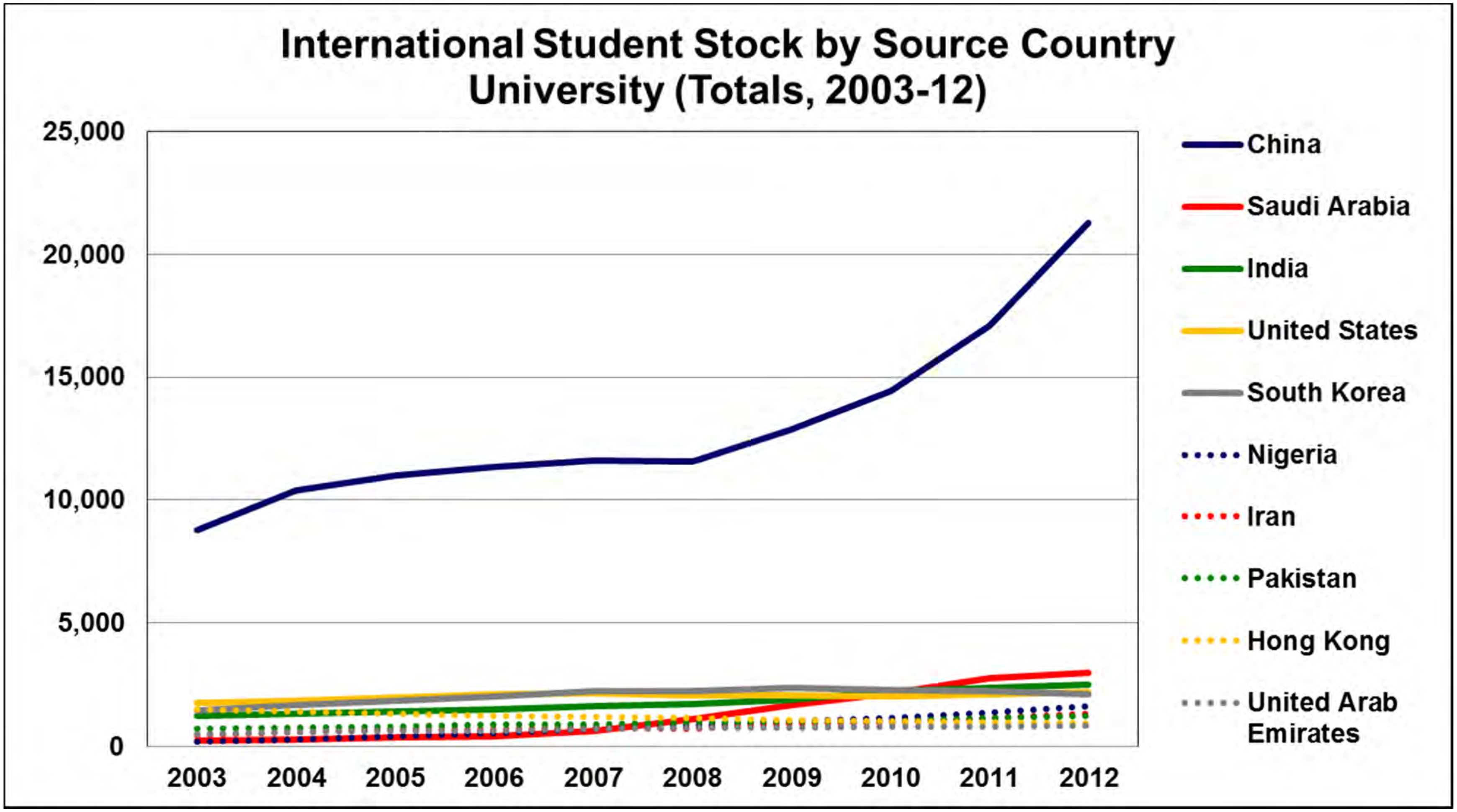
ONTARIO: SECTORAL TRENDS (UNIVERSITY INTAKE)



China remains on top for new university student entries

Source: CIC.

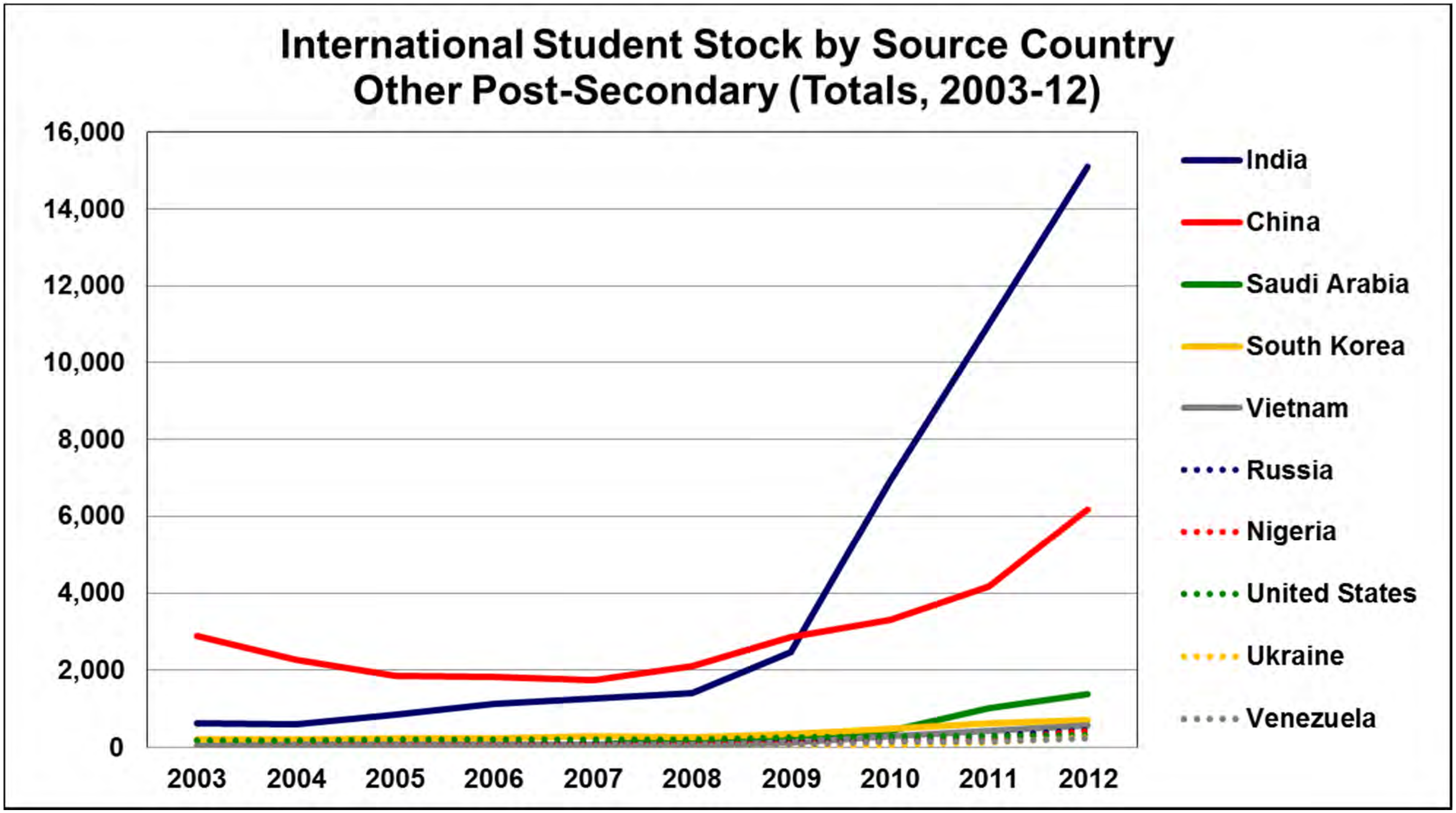
ONTARIO: SECTORAL TRENDS (UNIVERSITY ENROLLMENT)



High concentration of Chinese university students

Source: CIC.

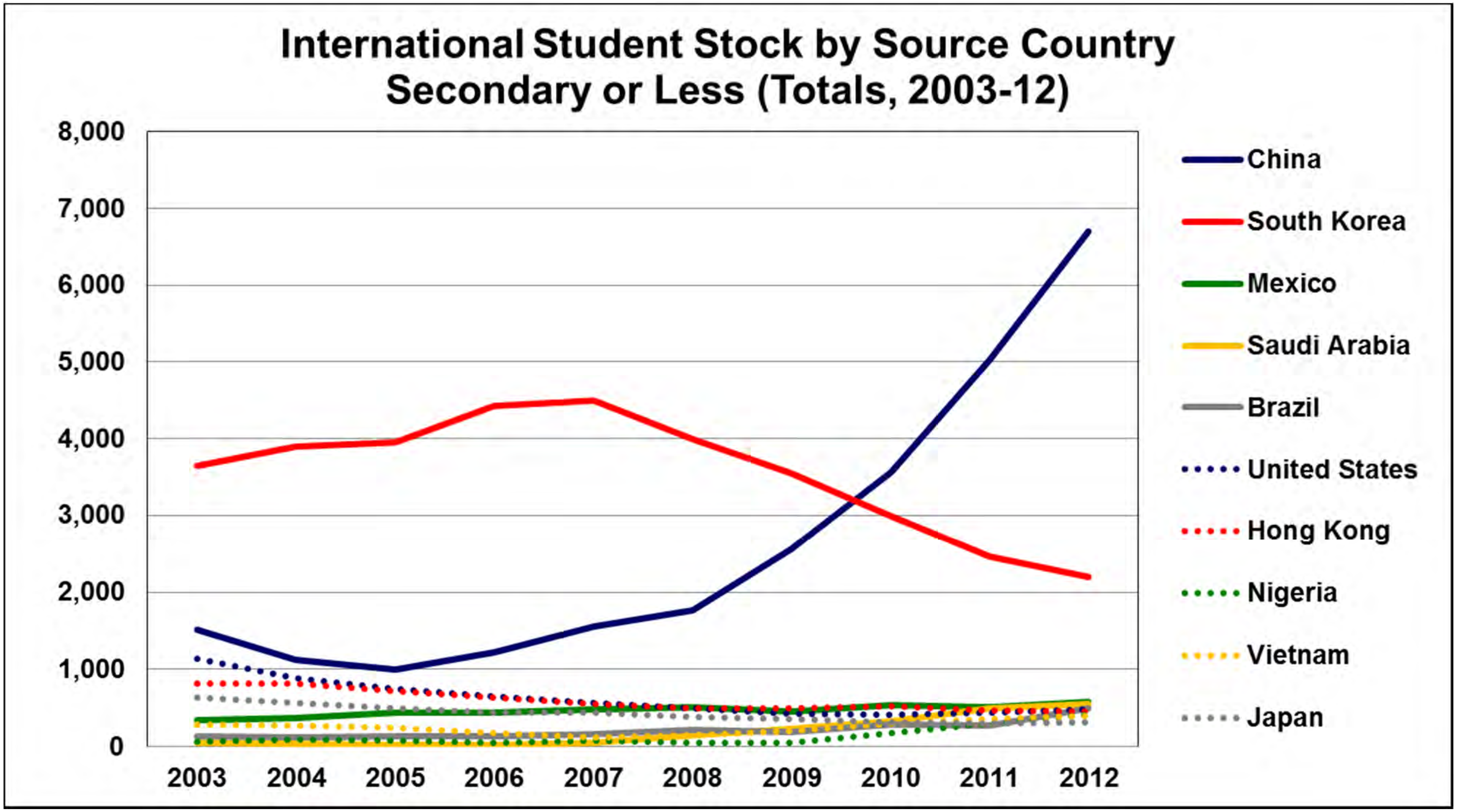
ONTARIO: SECTORAL TRENDS (COLLEGE ENROLLMENT)



College intake driven by India since 2008

Source: CIC.

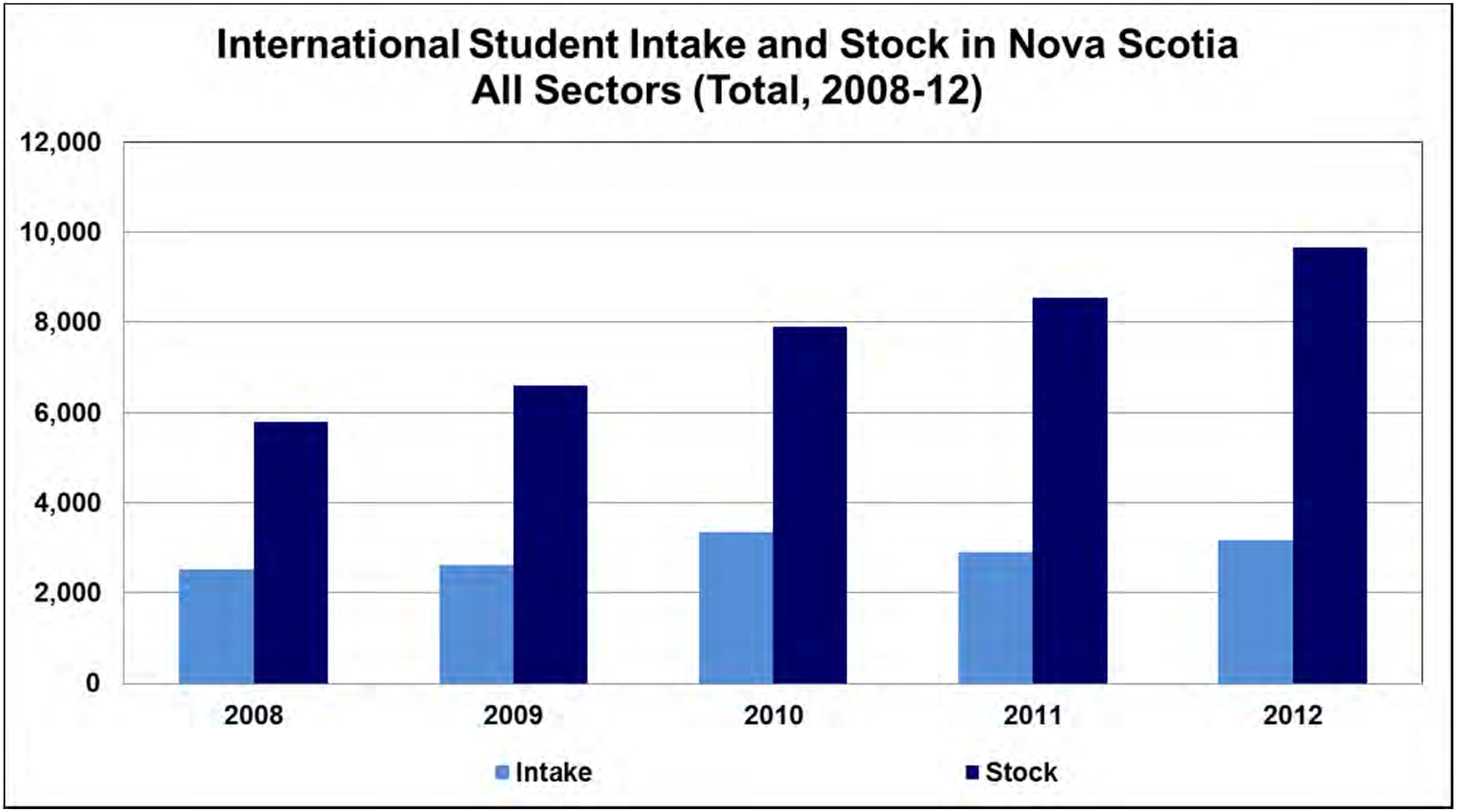
ONTARIO: SECTORAL TRENDS (K-12 ENROLLMENT)



High volume of Chinese students beginning in K-12

Source: CIC.

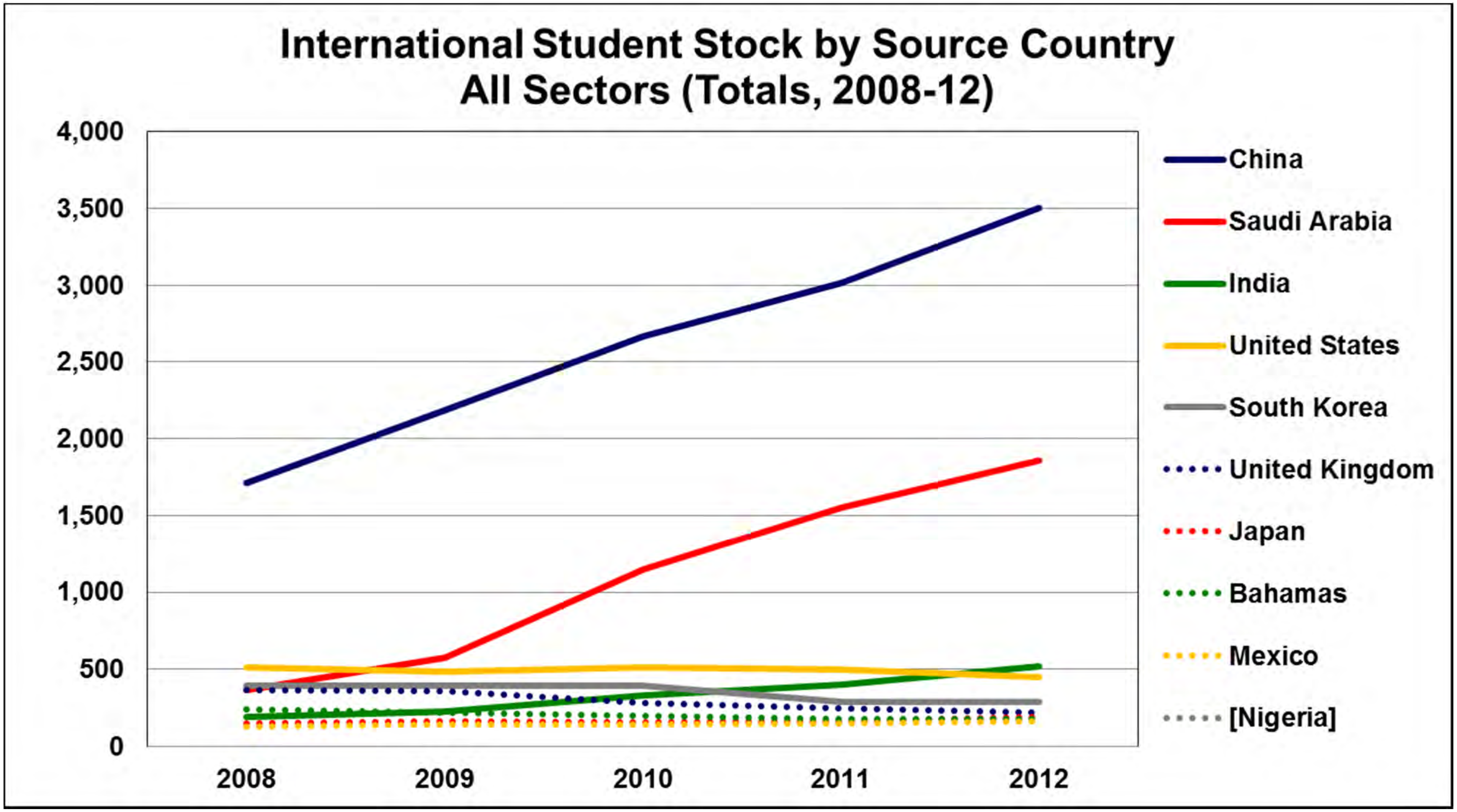
NOVA SCOTIA: OVERALL TRENDS (INTAKE AND ENROLLMENT)



Since 2008, intake growth: 25.7%; stock growth: 66.7%

Source: CIC.

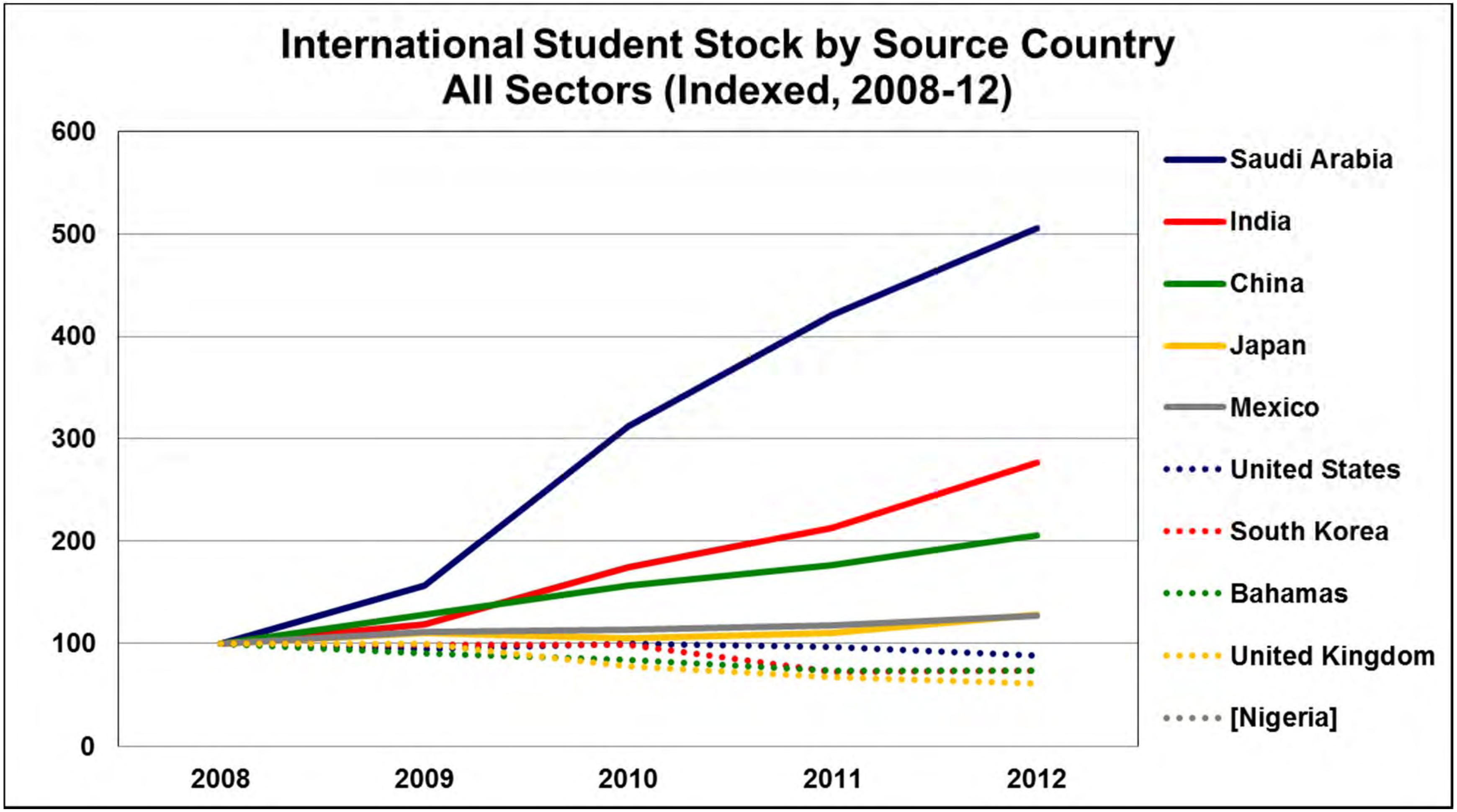
NOVA SCOTIA: SOURCE COUNTRY TRENDS (ENROLLMENT)



China and Saudi Arabia account for 55.6% of enrollment

Source: CIC.

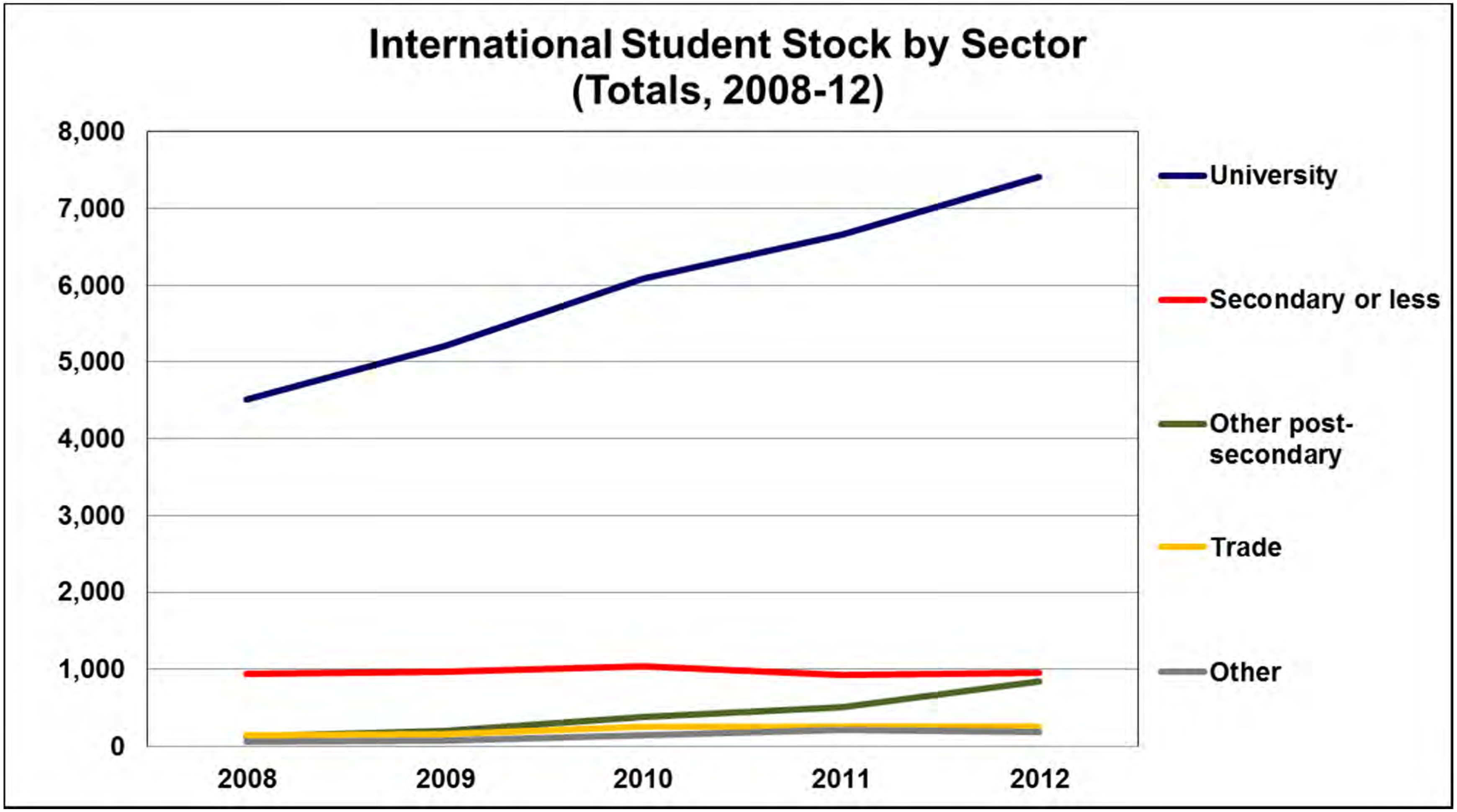
NOVA SCOTIA: SOURCE COUNTRY TRENDS (ENROLLMENT)



Enrollment growth largely from Saudi Arabia, India, and China

Source: CIC.

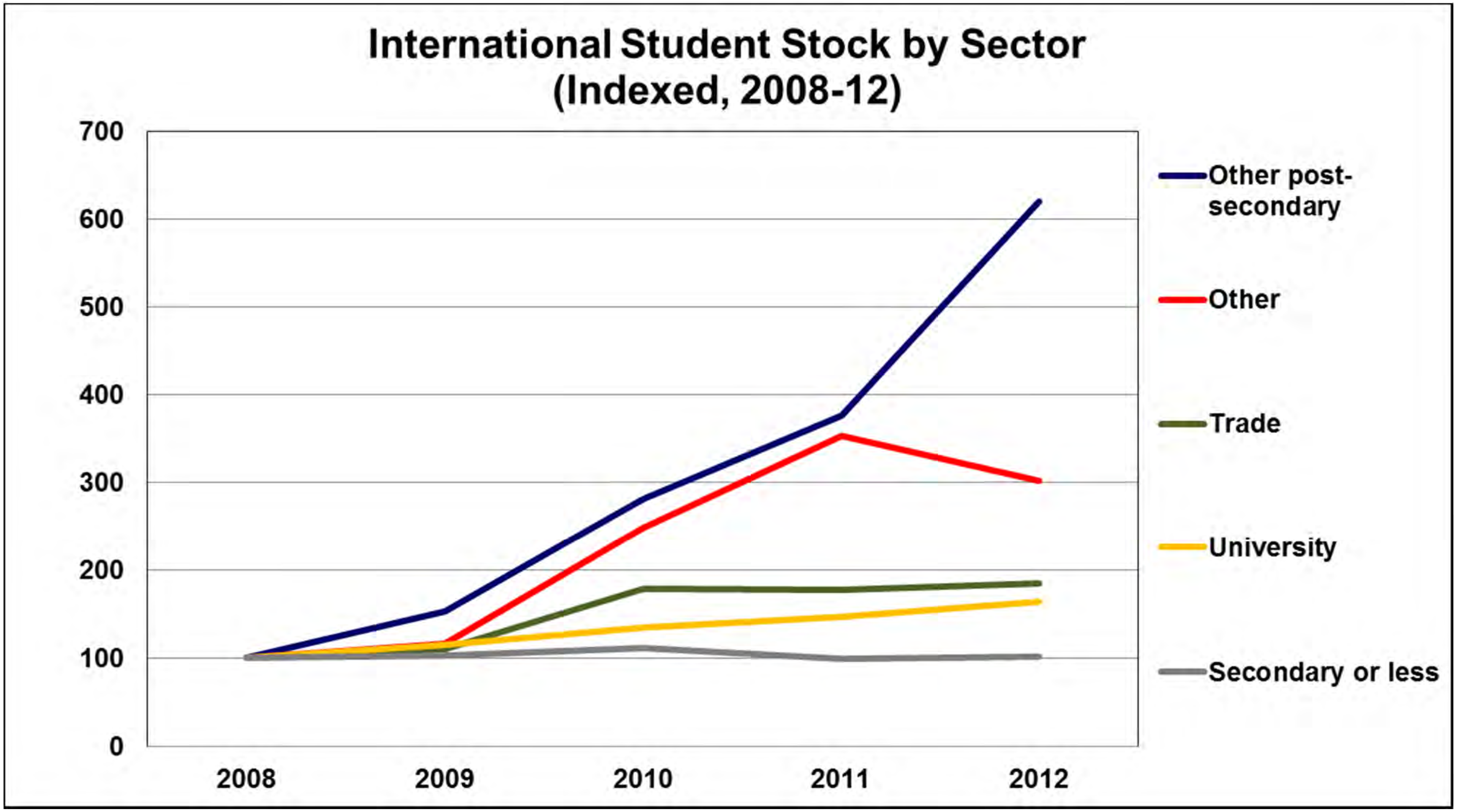
NOVA SCOTIA: SECTORAL TRENDS (ENROLLMENT)



Universities are the main attractor

Source: CIC.

NOVA SCOTIA: SECTORAL TRENDS (ENROLLMENT)



Growth emerging in the college sector

Source: CIC.

STUDENT RECRUITMENT PERSPECTIVES
Global, Canada, and Nova Scotia

- **Global: Canada's growth outpacing major global competitors**
- **Global: But Canada will face renewed efforts from the competition**
- **Canada: Consistent year-over-year enrollment growth**
- **Canada: Intake slowdown may predict future enrollment patterns**
- **Ontario: Growth tied to Chinese university students and Indian college students**
- **Nova Scotia: University is currently the enrollment driver**
- **Nova Scotia: High concentration from China and Saudi Arabia**

Nova Scotia has been notably successful since 2008 – but issues lurk

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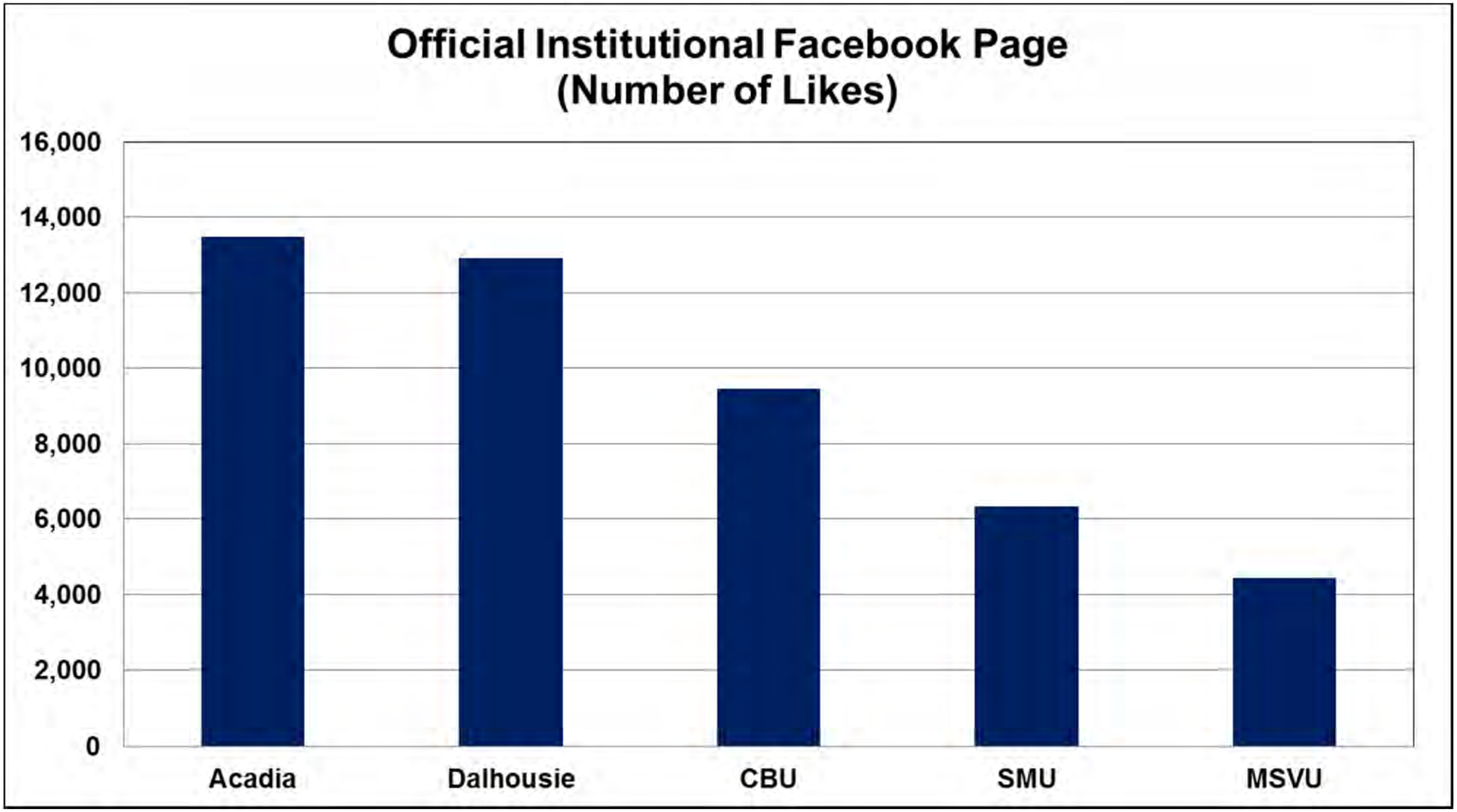
CHANNEL PERSPECTIVES
An Incomplete Overview

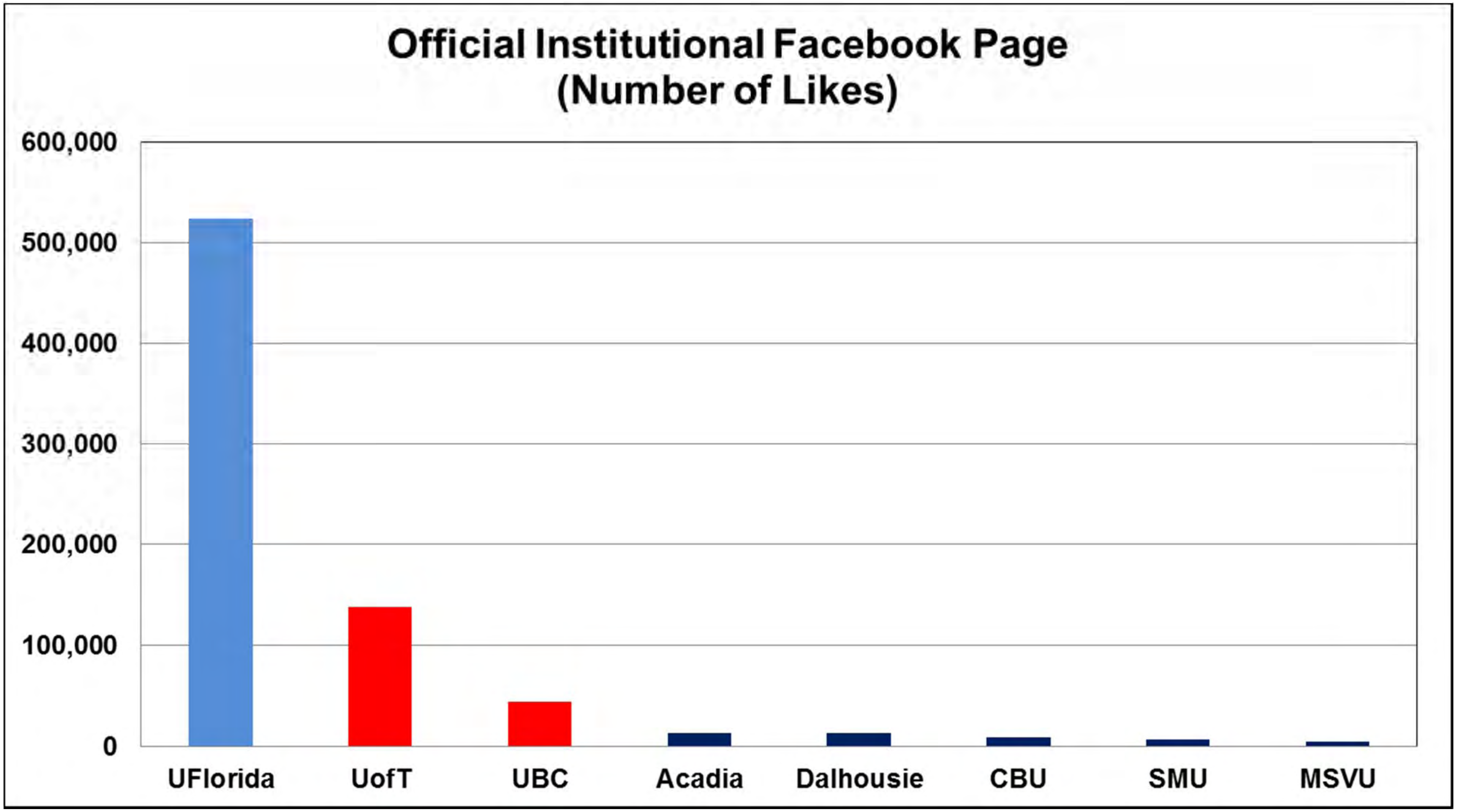
- **Agents (from mom-and-pop to IDP)**
- **Alumni Networks (involved as talent scouts)**
- **Articulation and degree agreements (e.g. 2+2, 1+3, etc. degrees)**
- **Fairs, conferences, and recruiting events (many 1,000s by now)**
- **Feeder schools (e.g. IB World schools)**
- **Internet portals (e.g. display ad buys on QS)**
- **Partnering (from higher education institutions to portal players such as Zinch)**
- **Pathways (e.g. Navitas, NSISP, etc.)**
- **Social media (e.g., Facebook international recruiting wall, etc.)**



What does 10,000 likes actually mean?

Source: Facebook (October 2013).

CHANNEL PERSPECTIVES
Social Media



Oxford: 1,215,455 likes

Source: Facebook (October 2013).

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A BASELINE VIEW ON INTERNATIONAL TUITION FEES

- **International Higher Education Economics (2012):**
  - **Education spending worldwide in accounted for around USD 2.2 trillion (Worldbank, ICG).**
  - **International higher education spending accounted for around USD 120-140 billion (ICG).**
  - **International tuition fees account for about one-third of the aforementioned.**

- **International Tertiary Students (2011):**
  - **Total international tertiary enrollment: 4.1 million (OECD).**
  - **Students in “high international tuition fees” countries: Around 1.7 million (ICG).**

- **Logic and Development:**
  - **Despite certain beliefs, tuition fees as such do not discourage international student enrollments. Perceived and actual value are more important.**
  - **(Differential) fees for international students have proliferated over the last 25 years – from Australia to Sweden.**
  - **Overall policy trends favor a shift towards more differential fee models.**

INTERNATIONAL TUITION FEES: THE GLOBAL CONTEXT

- **The total cost for international education participation has increased notably over the last two decades.**
- **At the upper range some bachelor's degree programs now require an investment of more than to USD 300,000 for an international student.**
- **At the same time a number of higher education institutions have become dependent on international tuition fees revenue to drive their institutional budgets.**
- **At this scale of magnitude institutions can no longer use traditional policy models to set tuition fees.**
- **Mis-positioning of tuition fees pricing can result in negative outcomes for institutions:**
  - **Lost revenue**
  - **Reduction of quality student intake**
  - **Damage to institutional brand**

METHODOLOGY OF TUITION FEES BENCHMARKING
Overview: International Tuition-based Competition Database

- **ICG's International Tuition-based Competition Database (ITBCD) contains over 7,000 individually benchmarked undergraduate and graduate programs (base: 2013 fees; 2011 to 2016 modeled also loaded):**
  - **6,200+ university programs**
  - **600+ art and design institution programs**
  - **200+ college programs**
- **Data has been compiled for tuition fees, additional fees, and cost of living for all 7,000 programs.**
- **Calculations reflect monthly increments, reflecting academic years with durations of 8 to 11 months.**
- **Institutions on four continents (Asia, Australia, Europe, and North America) are covered.**
- **2,200 hours of research total, 400 hours for cost of living alone**

The 2014 update will add 1,000s of additional programs

METHODOLOGY OF TUITION FEES BENCHMARKING
Tuition Fees: Research Overview

- **International tuition fees were captured from the perspective of an international student.**
- **All tuition fees sourced were retrieved from publicly available sources:**
  - **Websites**
  - **Academic Calendars**
  - **Viewbooks**
- **Degree programs covered include:**
  - **Bachelor's**
  - **Honors (Undergraduate)**
  - **Master's**
- **Doctoral degrees are currently not covered:**
  - **Ph.D.'s, D.Phil., etc.**
  - **Law (JD etc.)**
  - **Medicine (MD etc.)**

METHODOLOGY OF TUITION FEES BENCHMARKING
Tuition Fees: Considerations

Fees	Requirements	Fee Fluctuations
☐ Per Credit	☐ Credits	☐ Static
☐ Per Unit	☐ Units	☐ Constant Rate
☐ Per Term	☐ Terms	☐ Floating
☐ Per Year	☐ Years	☐ Entry-exit guaranteed
☐ Per Program		☐ Cohort-based (constant)
		☐ Cohort-based (floating)

METHODOLOGY OF TUITION FEES BENCHMARKING
Cost of Living: Research Overview

- **Cost of living is an area of an international student's overall cost portfolio that institutions often overlook when setting tuition fees.**
- **Cost of living is often the highest portion of an international student's budget.**
- **ITBCD covers two different methodologies for cost of living data:**
  - **Institutional Estimates**
  - **ICG's Standard Model for International Living Expenses (SMILE)**
- **SMILE was created as an independent assessment tool, due to the fact that many institutions significantly underestimated cost of living in their official projections to international students.**

METHODOLOGY OF TUITION FEES BENCHMARKING
Cost of Living: Expense Categories

- **Rent/Housing – Expenses for on- and off-campus rent and utilities.**
- **Food**
- **Books – Expenses on books and stationery.**
- **Transport – Public transportation expenses.**
- **Communication – Ongoing expenses for using a phone and accessing the Internet and television services.**
- **Health Insurance**
- **Apparel – Expenses for clothing and shoes.**
- **Entertainment**
- **Travel – Estimated price of a return ticket from Beijing/Shanghai to the closest major airport to the institution's location (annual).**

METHODOLOGY OF TUITION FEES BENCHMARKING
Cost of Living: MIN-MAX and SMILE

- **ICG's MIN-MAX approach**
  - **Estimating cost of living ranges for today's highly diverse and economically highly disparately resourced international student pool is subject to a high degree of uncertainty and variation.**
  - **To address this issue, ICG designed a MIN-MAX approach. Cost of living is thus calculated on the basis of the minimum (MIN) reasonable level of cost positions for the maximum (Max) number of (typical) students.**

- **ICG's Standard Model for International Living Expenses (SMILE)**
  - **SMILE estimates the average on- and off-campus standard minimum expenses incurred by a student. The typical student referred to in this model would be living in shared accommodation and using public transportation.**
  - **In order to ensure consistency and reliability, the research is based on institutional data, external data, and a combination of both. Sources other than institutional data include national household expenditure surveys and search engines for housing and airfare.**

METHODOLOGY OF TUITION FEES BENCHMARKING
Additional Fees: Research Overview

- **Additional Fees are any fees charged to international students, beyond tuition fees.**
- **Includes: Student service fees; technology fees; program fees; etc.**
- **The ability to levy additional fees varies by national jurisdiction and the type of higher education institution.**
- **Additional fees are often a hidden way institutions extract further revenue from international students.**
- **ICG has analyzed additional fees at a program level.**

METHODOLOGY OF TUITION FEES BENCHMARKING
Banding: Research Overview

- **In order to establish a strategic perspective on research universities' market power and brand in relation to international tuition fees setting, ICG undertook a banding exercise.**
- **Research universities were segmented into twelve major bands through aggregated major international university rankings.**
- **Each band corresponds with a particular level of market power.**
- **Bands can be used to broadly segment markets for international research universities.**

METHODOLOGY OF TUITION FEES BENCHMARKING
Overview of Twelve Major Brand Bands

Bands

- **Band 1: Top 9**
- **Band 2: Top 25 (i.e. 10-25)**
- **Band 3: Top 50 (i.e. 26-50)**
- **Band 4: Top 100 (i.e. 51-100)**
- **Band 5: Top 200 (i.e. 101-200)**
- **Band 6: Top 300 (i.e. 201-300)**
- **Band 7: Top 400 (i.e. 301-400)**
- **Band 8: Top 500 (i.e. 401-500)**
- **Band 9: Top 600 (i.e. 501-600)**
- **Band 10: Top 700**
- **Band 11: Top 800**
- **Band 12: Beyond Top 800**

Bands reflect amalgamated rankings from ARWU, THE, QS

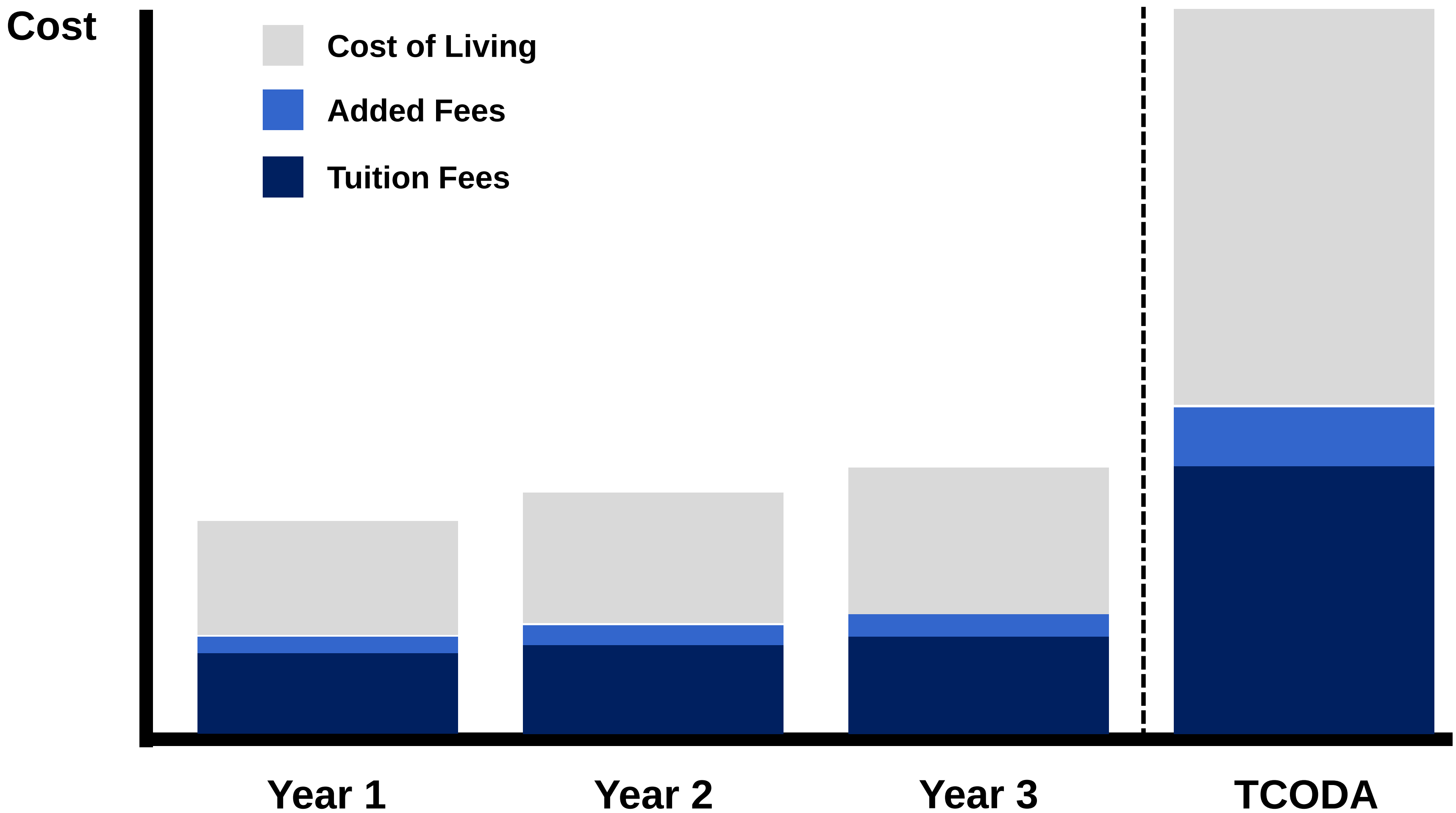
METHODOLOGY OF TUITION FEES BENCHMARKING
Banding: Methodological Disclaimers

- **Banding clarity declines when moving down the ranking ladder. This is a reflection of the clear differentiation factors at the very top of rankings, and the much more amorphous nature of rankings differentiators starting around rank 100.**
- **Perceptions of rankings "users" matter. Since these include students, parents, secondary school principals, agents, scholarship bodies, faculty members, and so on, it is not possible to design a definitive roster of rankings perspectives.**
- **Instead, ICG's banding methodology attempts to rationalize assumptions of the aforementioned stakeholders.**

METHODOLOGY OF TUITION FEES BENCHMARKING
Total Cost of Degree Acquisition: Research Overview

- **In order to understand the full cost portfolio that international students face for a particular degree program, ICG created the concept of Total Cost of Degree Acquisition (TCODA).**
- **TCODA combines tuition fees, additional fees, and cost of living (from SMILE) data into one metric of cost.**
- **All costs have been converted to CAD to facilitate comparisons.**
- **Using forward-looking modeling ICG can predict the TCODA for an international student over the life of a degree program.**

THE LOGIC OF TOTAL COST OF DEGREE ACQUISITION (TCODA)
Example: Three-Year Degree

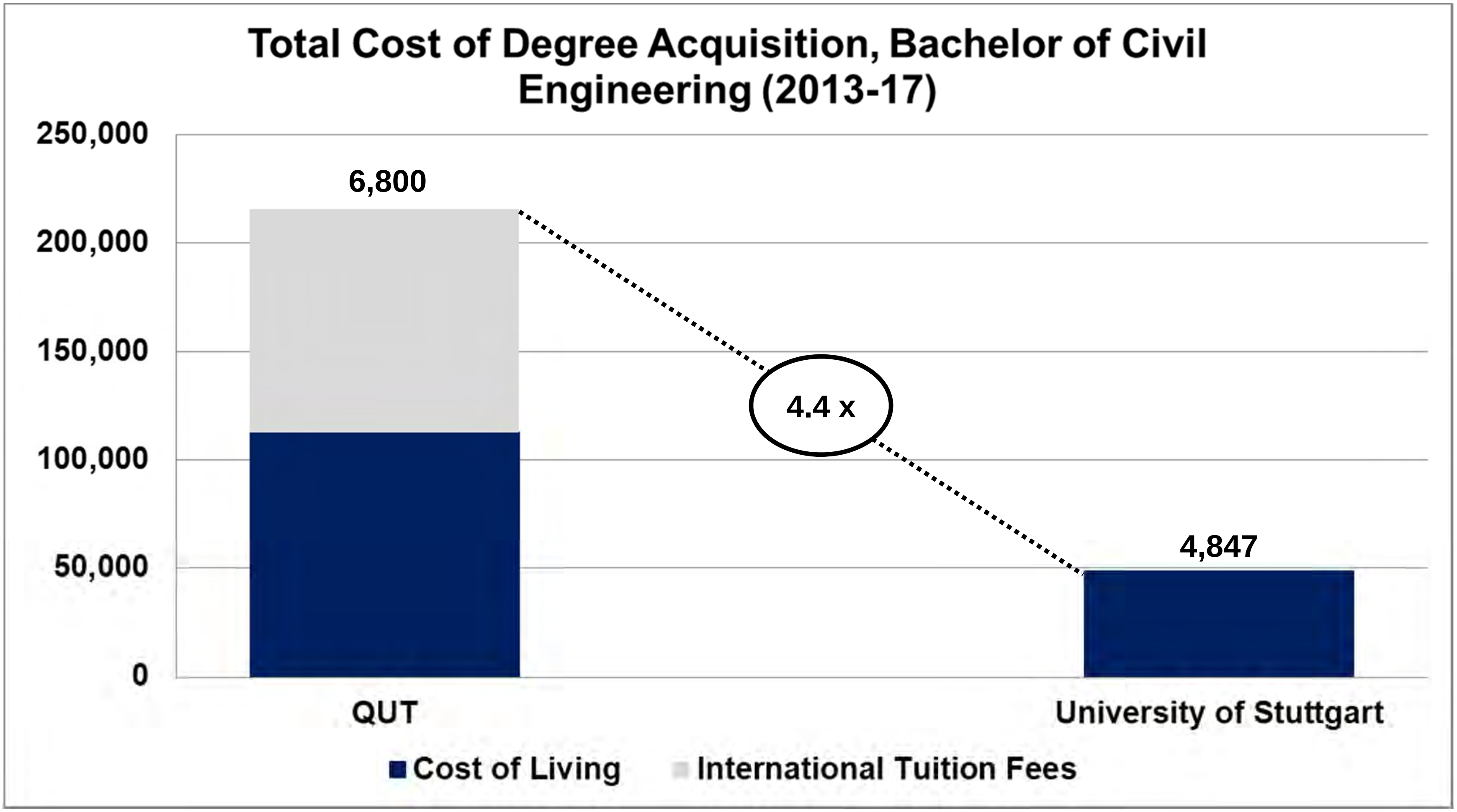


International Students "have to" consider TCODA

METHODOLOGY OF TUITION FEES BENCHMARKING
Modeling: Forward Looking Calculations

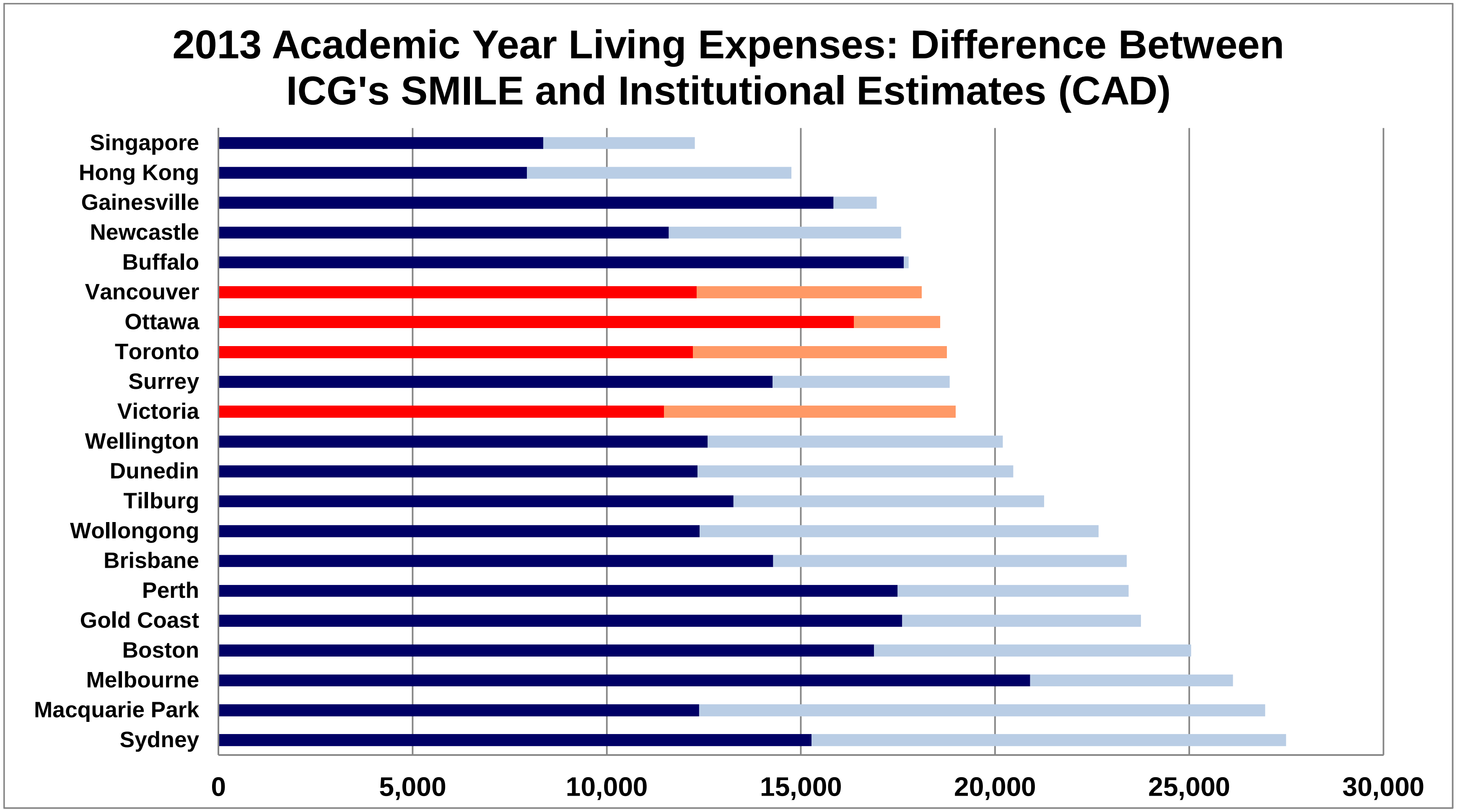
- **Forward looking modeling for tuition fees was conducted using two possible methodologies.**
- **When an institution indicated a policy for future tuition fee increases, this policy was applied.**
- **When no policy was available (large majority of cases), historical tuition fees data was retrieved, using a three to five year sample.**
    - **The rate of change from this sample was then applied to future years.**
- **Forward looking modeling for additional fees and cost of living data was conducted using similar methodology.**
- **Historical inflation rates for the last 20 years were retrieved and used as a baseline for future increase of additional fees and cost of living.**
- **All three forward looking models (tuition fees, additional fees, and cost of living) were aggregated to create complete TCODA models.**

TUITION FEES AS SUCH HAVE LITTLE TO DO WITH AN INSTITUTION'S ABILITY TO RECRUIT INTERNATIONAL STUDENTS



QUT enrolls 2,000 more international students than Stuttgart while costing 4.4 times more

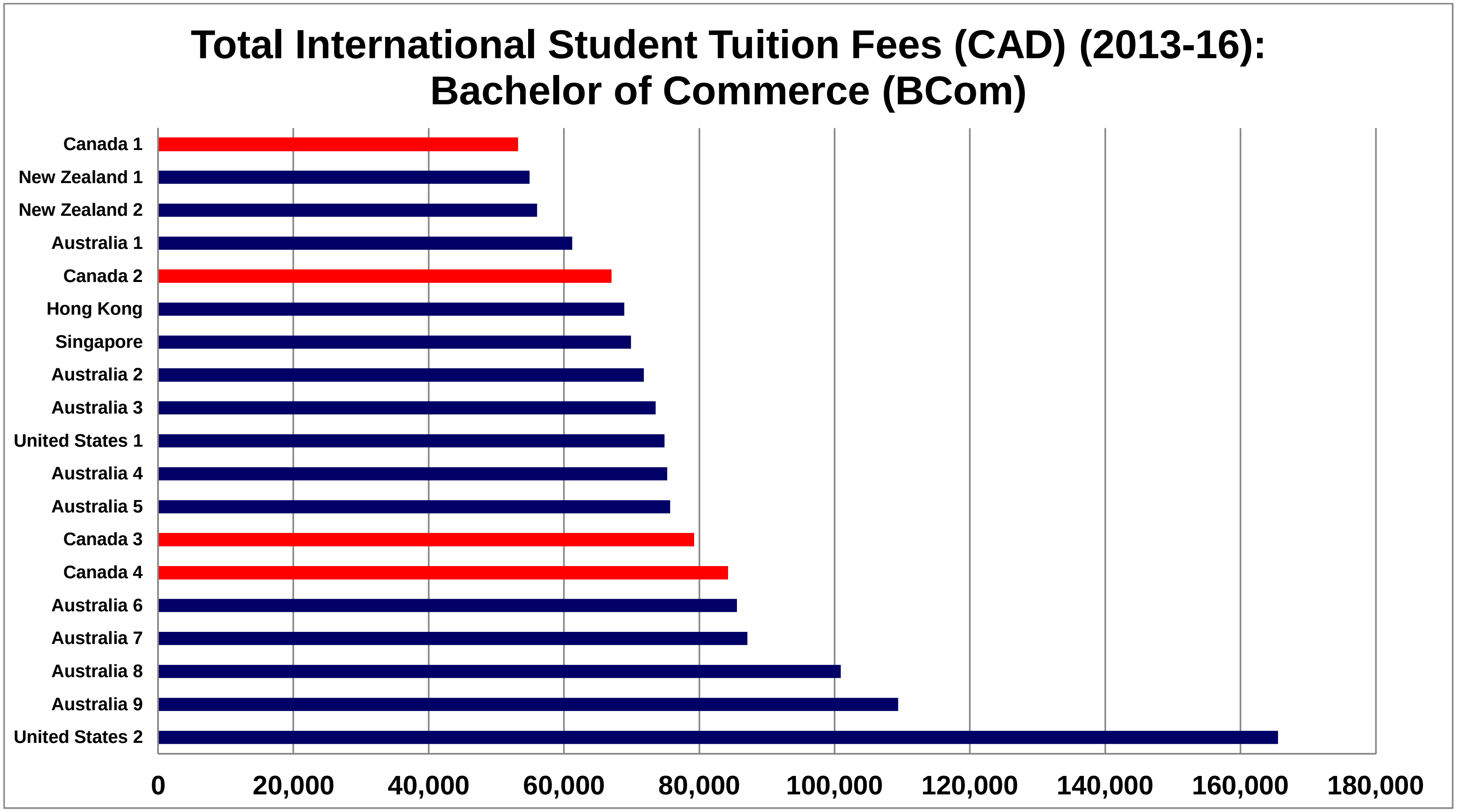
CANADA'S COMPETITIVE POSITION: TUITION FEES
2013 Academic Year Living Expenses: SMILE vs. Institutional Estimates



Many institutions significantly underestimate cost of living

Source: ICG ITBCD.

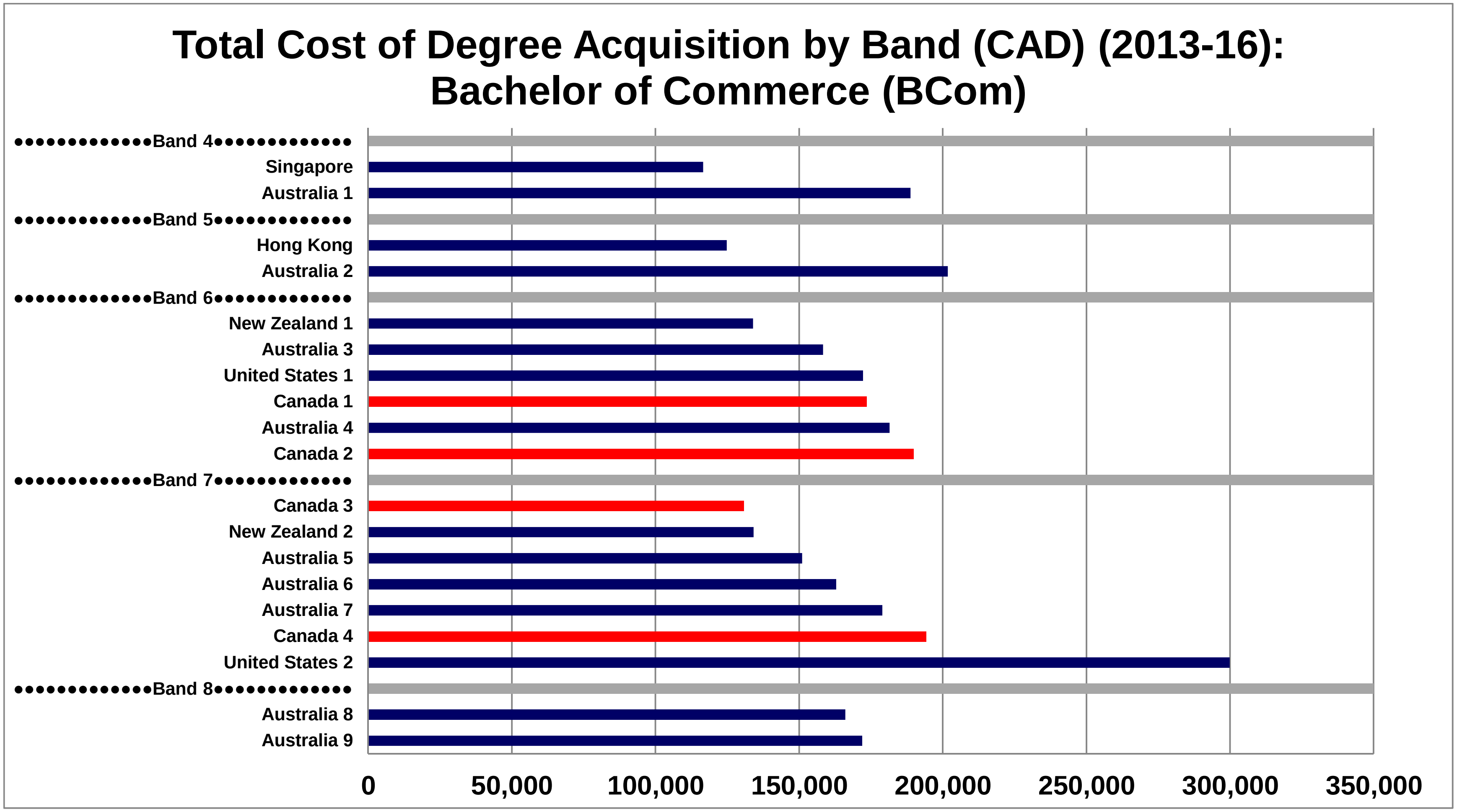
CANADA'S COMPETITIVE POSITION: TUITION FEES
2013-16 Total Tuition Fees Cost: Bachelor of Commerce Programs



Canada and New Zealand offer best tuition fees value propositions

Source: ICG ITBCD.

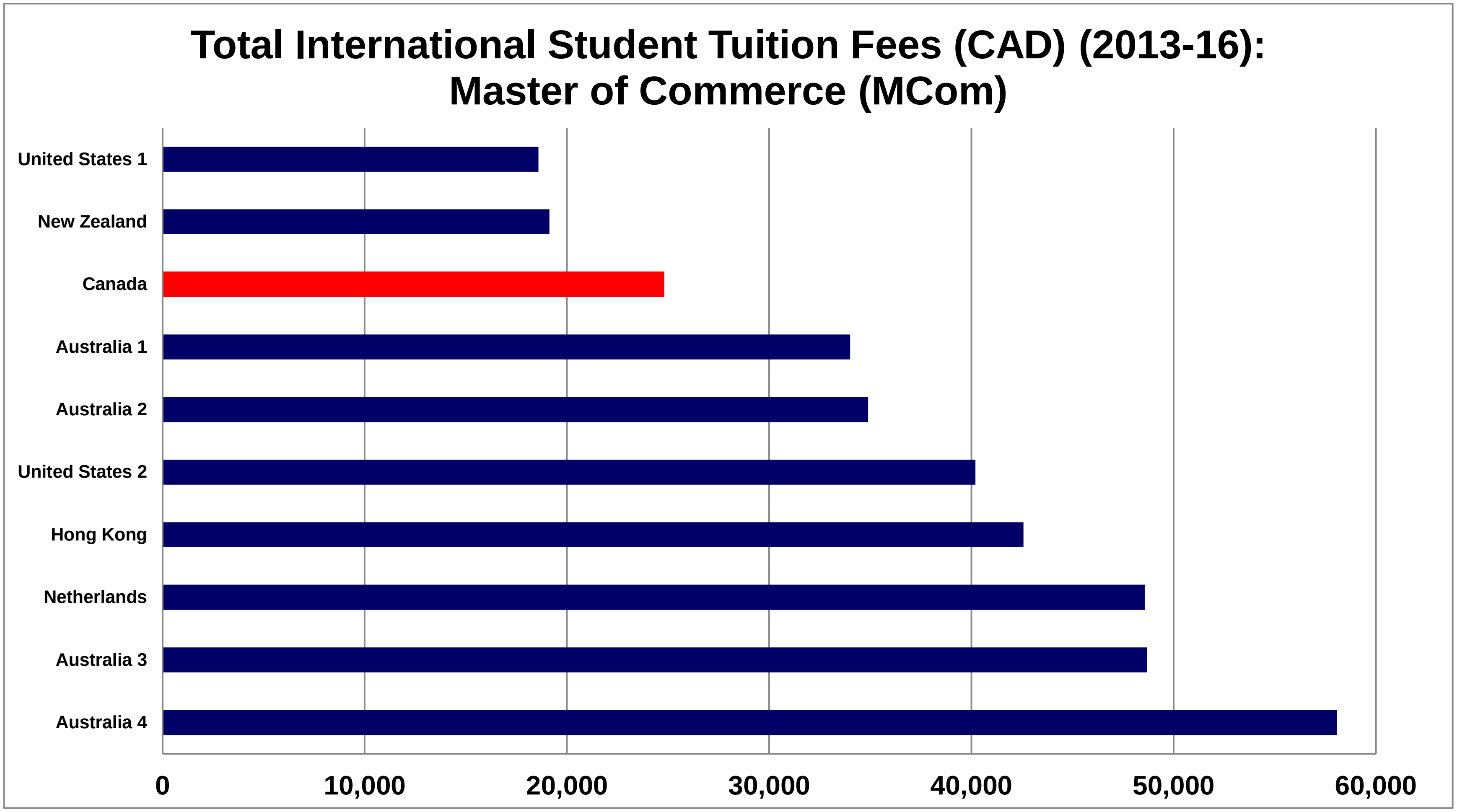
CANADA'S COMPETITIVE POSITION: TUITION FEES
2013-16 TCODA by Band: Bachelor of Commerce Programs



Price elasticity is a potent factor for BCom programs

Source: ICG ITBCD.

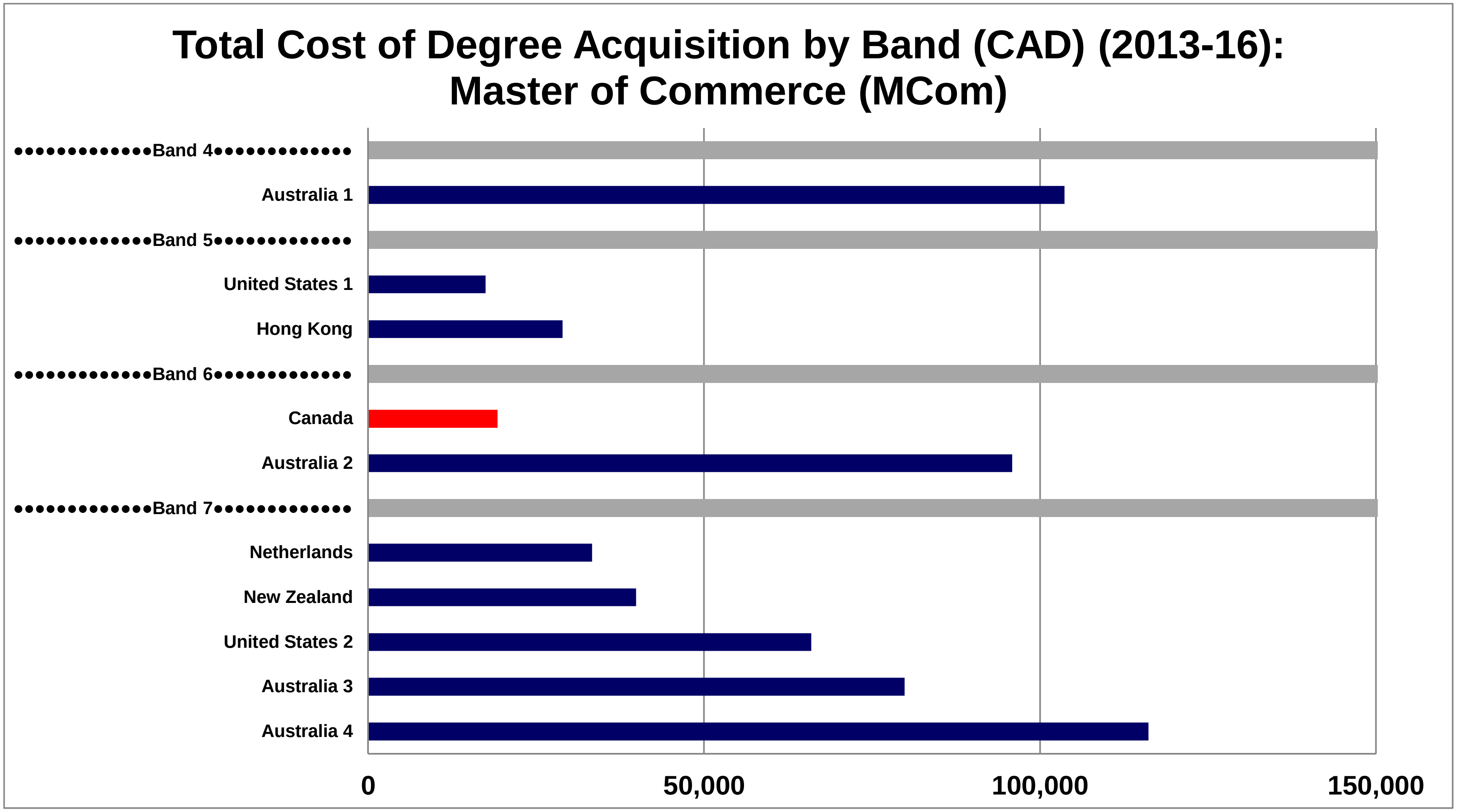
CANADA'S COMPETITIVE POSITION: TUITION FEES
2013-16 Total Tuition Fees Cost: Master of Commerce Programs



Cost differentiation partially owed to 1-year versus 2-year programs

Source: ICG ITBCD.

CANADA'S COMPETITIVE POSITION: TUITION FEES
2013-16 TCODA by Band: Master of Commerce Programs



Strong contrast in price points within market bands

Source: ICG ITBCD.

AGENDA

Housekeeping

Advisory Panel on Canada’s International Education Strategy

International Student Recruitment: Global, Canada, and Nova Scotia

Channel Perspectives

International Student Tuition Fees

Value-Added Factors

Discussion

VALUE-ADDED FACTORS
Overview

- Institutions do not necessarily have the authority or budgetary flexibility to control increasing international student tuition fees.
- These institutions need to be able to identify and clearly communicate the additional value for money they deliver to international students relative to competitors.
- Assessment of value-added factors seeks to position universities relative to others of similar rank/reputation and in similar tuition segments.

VALUE-ADDED FACTORS
International Alumni Networks

- **The footprint of a university's international alumni relations can vary widely, from a small network of regional alumni representatives to a large number of highly active and geographically-distributed chapters.**
- **Older and larger universities may benefit from larger alumni pools, but these networks may not be as actively mobilized as their peers.**
- **Alumni activities can range from a local pub night with five to ten alumni to a substantial 'alumni, friends and partners' gala/reception in a major metropolitan area.**
- **Tools like LinkedIn have facilitated alumni relations for both institutions and interested individuals – there are many 'unofficial' user-created alumni networks with large memberships.**

VALUE ADDED FACTORS
Scholarships

- Measuring the true net amount of tuition fees paid by international students at most institutions proves challenging.
- Entrance scholarships act as both a means of off-setting tuition fees and potentially as a way to compete to attract talented international students.
- Universities charging "high" tuition fees can nevertheless recruit international students with the availability of a compelling entrance scholarship portfolio.
- Savvy international students will rationalize their likelihood of obtaining an entrance scholarship when making their application decisions.

VALUE-ADDED FACTORS
Co-ops/Internships

- **As students become more labour market-oriented, the potential for co-op placements and internships during study is an increasingly important consideration.**
- **Canadian universities perform well at offering co-op opportunities, but this is not as well-known as it should be.**
- **For example, more than 16,000 University of Waterloo students were employed in co-op placements in 2012-13.**
- **In Australia, the State Government of Victoria announced the provision of 150 internship placements annually as part of its international education strategy.**

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