

## EXECUTIVE SUMMARY

### Introduction

This study examines the opportunities for enhanced collaboration between Canada and Australia in the area of international education. Funded by the Canadian Department of Foreign Affairs and International Trade (DFAIT), the project aims to determine whether, in Australia, there is a potential market for Canada as an education destination. In seeking to answer this question the study explores the size and nature of the Australian international education industry; assesses the willingness of Canadian and Australian institutions to collaborate in joint marketing and supply initiatives; and considers the policy implications of this.

The study involved four distinct components. In the first stage a review of the literature was undertaken to assess the size and nature of the Australian and Canadian international education industries. During the second stage a series of in-depth interviews were conducted with a range of education institutions in Australia at all levels. The third stage involved a survey of Canadian colleges and universities to gather comment from that country on the proposals generated during the first stage. In the final stage, a survey of international and domestic students was conducted in institutions throughout Australia. The findings from these four stages were:

### Assessment of the Australian and Canadian industries

Canada and Australia are key suppliers of international education. However, over the past decade Canada's share of international students has declined relative to Australia's. The causes of this decline appear to be related to a lack of coordination in Canada's international marketing effort. Australia also appears to have a competitive advantage in its geographic proximity to many South East Asian markets. Over the longer term Canada is likely to regain some its lost market share from Australia by adopting a more professional and nationally coordinated marketing campaign.

There are over 80,000 international students studying in Australia. Thirty-one percent are enrolled in private colleges and there is a potential pool of some 32,000 international students who have not yet enrolled in an Australian university and may choose to relocate to Canada given sufficient inducement.

Australia also hosts 5.4 million students and sends over 5,000 overseas for full time study, primarily in the United States. Many of these students complete undergraduate degree programs in America and pay fees. Canada may be able to attract a larger proportion of this group than it currently does if suitable marketing strategies were undertaken.

Canada may also attract a sizeable number of Australia post-graduate students. The median course fees for post-graduate programs in Canada are substantially lower than in Australia. With Australia's universities now shifting towards charging full-fees for post-graduate course work Masters and Doctorates, it is possible that Canada might become attractive to the 15,000 Australian students who undertake such programs.

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*Institute for Research into International Competitiveness (IRIC)*

*Curtin Business School, Curtin University of Technology*

*GPO Box U1987, Perth WA 6001. Tel: (09) 351-2843, Fax: (09) 351-2872.*