INTERNATIONAL EDUCATION: THE ASIA PACIFIC REGION AND CANADA

A MARKETING STUDY FOR THE ASIA PACIFIC BRANCH
DEPARTMENT OF FOREIGN AFFAIRS AND INTERNATIONAL TRADE

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INTERNATIONAL EDUCATION: THE ASIA PACIFIC REGION AND CANADA

TWO MAJOR COMPANIES WERE BIDDING FOR A LARGE COAL CONTRACT IN AN ASIAN COUNTRY. ONE COMPANY WAS CANADIAN. THE OTHER COMPANY WAS FROM A FRIENDLY COMPETING NATION.

BOTH COMPANIES MADE THEIR PRESENTATIONS.

THE CANADIAN BID WAS REGARDED AS "BEST QUALITY AND BEST COST" BUT THE OFFICIAL MAKING THE DECISION ON WHICH COAL CONTRACT TO PURCHASE HAD TAKEN POSTGRADUATE STUDY IN THE COMPETING COUNTRY.

GUESS WHICH COMPANY WON THE CONTRACT?

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OVERVIEW

Purpose

The purpose of this study is to examine the opportunities for Canadian educational exporters in the Asia Pacific region. The paper focusses on 10 target markets in which Canada has well-defined and growing interests: South Korea, Japan, Hong Kong, China, Singapore, Taiwan, the Philippines, Indonesia, Thailand and Malaysia. The study also takes into account the international education policies and practices of four of Canada's major competitors in the region: Australia, the United States, the United Kingdom and New Zealand.

For the purposes of this work, a Canadian "education export" is defined as: a) an international student[1] coming to Canada to study, or: b) a Canadian educational service or product being sold internationally. Exports include those services and products provided through public and private educational systems at the primary, secondary, college, or university level, on a full-or part-time basis, ranging from intensive second language programs to postgraduate degree programs.

Context

Canada's links with Asia Pacific have become increasingly important over the past two decades. Asia Pacific's share of Canada's non-U.S. exports has grown from less than 25 percent in 1975 to over 40 percent in 1992. Ten of Canada's top 25 trading partners are Asia Pacific economies, representing over $15 billion in merchandise trade.

Economic growth in the region continues at record-breaking rates, with some Asian economies experiencing growth at rates close to 10 percent. Apart from large domestic and regional markets, the growing economic might of Asia Pacific rests on an increasingly educated population. Education in Asian societies, nurtured in Confucian thought, is revered. Recent studies have shown that high-school students in Taiwan, South Korea, Singapore, Hong Kong and Japan outscore their Canadian and U.S. counterparts on tests of Science and Mathematics. While teaching methods and length of academic programs differ between Canada and the Asia Pacific economies, these indicators of economic and academic success suggest we have much to learn from each other.

Interest in international education is escalating throughout the world. Globally, the international post-secondary student population exceeded 1.5 million individuals in 1991 and is expected to continue to expand. Major recipient countries for international students, including the United States, the United Kingdom and Australia, have adopted aggressive promotional campaigns and have undertaken innovative marketing strategies to enhance their ability to capture more of this educational market. Their efforts are succeeding.

[1] *Unless otherwise indicated, "international student" refers to a student from the Asia Pacific region.*

TABLE A

INTERNATIONAL STUDENT POPULATION, BY SOURCE COUNTRY AND BY DESTINATION

SOURCE	TOTAL	DESTINATION U.S.	U.K.	AUS.	CANADA	OTHER
KOREA	38 000 *	80%	3%	8%	2%	7%
JAPAN	120 362 **	30%	1%	4%	4%	61%
HONG KONG	36 110	35%	20%	12%	25%	8%
MALAYSIA	58 254	25%	14%	16%	4%	41%
SINGAPORE	15 371	25%	21%	13%	14%	10%
THAILAND	10 000 '	63%	4%	6%	3%	24%
PHILIPPINES	6 000 '	68%	1%	3%	2%	27%
INDONESIA	16 500 '	53%	4%	10%	2%	30%
TAIWAN	N/A	33 500	N/A	2 485	3 501	N/A
CHINA	85 000 '	48%	2%	27%	5%	18%

Note: * *Number of students studying in English-speaking countries only*
** *Number of students and business people studying internationally*
' *Number of students studying at university level internationally*
N/A Not available

Source: Canadian Embassies; UNESCO; OECD

Nowhere is interest in international education more evident than in Asia Pacific. Accounting for more than 50 percent of all humanity, this region has become the major source of international students for Canada and competitor countries alike. Estimates of the true market size of the international education and training sector in each of the Asian economies range from about 10 000 students and business people studying internationally in some of the smaller markets to close to 100 000 individuals in some of the larger markets (Table A). About 3 percent of international post-secondary students from the Asia Pacific region pursue their studies in Canada.

The demand for advanced general and specialized training and high-technology courses as well as the interest in learning English, the international language of business, and to some extent French, is increasing in many of the newly industrialized economies of the region. In short, economies in Asia Pacific are interested in learning skills that will continue to fuel their phenomenal economic growth into the year 2000 and beyond.

Implications for Canada

While many Canadian educational institutions have received students at various levels from Asia Pacific, and others have established mutually beneficial educational links, this study suggests that Canada has not yet begun to tap its large potential for exporting educational services to Asia Pacific. We seriously risk losing what market share we have attained if a more co-ordinated and targeted marketing approach is not adopted.

International education is big business. In addition to paying tuition fees, international students pay rent, buy groceries and purchase many Canadian products and services while they reside here. In 1991, international students' expenditures in Canada were estimated by Statistics Canada (based on a Vancouver Board of Trade study) as contributing about $1.5 billion to the Canadian economy—an amount corresponding to approximately 19 000 jobs for Canadians. While our competitors have already recognized the significant economic impact of international students to their economies, Canada is just realizing this fact (Table B).

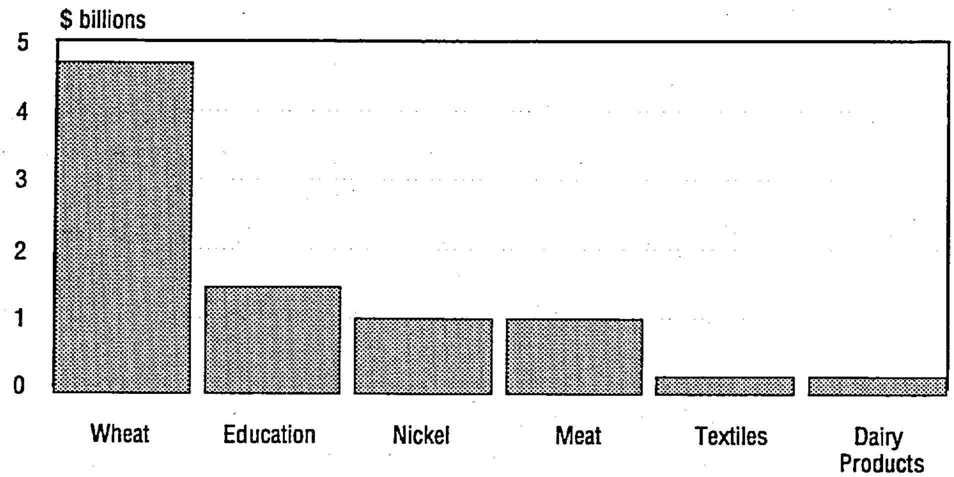
We have had some wake-up calls. The October 1992 Prosperity Initiative Report commissioned by the Government of Canada, *Inventing Our Future: An Action Plan for Canada's Prosperity*, highlights the importance of international education in helping "prepare Canadians to meet the challenge of globalization." The report urges Canada to market education more intensively to other countries and sets forth the challenge of doubling the number of international students in Canada over the next two years from 83 000 to 166 000.

Industry, Science and Technology Canada's 1990-91 *Industry Profile on Commercial Education and Training* suggests that the potential benefit "to other sectors of Canadian industry is considerable, as the provision of Canadian education and training services can lead to the development of broader and longer-term trading relationships."

It is the long term however, that deserves more attention. International education represents an essential opportunity for Canada to become better known to the next generation of Asian decision-makers while Asian languages and culture become known to the new wave of Canadian leaders. Enhanced cultural, political and economic understanding achieved through international education will help to ensure Canada's future success in the international marketplace and will promote the acceptance of Canadian foreign policy interests abroad. As noted by the Vancouver Board of Trade, "students' experiences here will create familiarity with and acceptance of Canadian products, which in turn will create opportunities for technology transfer, joint ventures and other future business arrangements."

TABLE B

CANADA'S EXPORTS IN 1991



Note: Education exports refer to estimated expenditures of international students in Canada.
Source: Statistics Canada

Canada has a great deal to offer in the international education marketplace. We have an education system at every level that is recognized internationally for its overall good—and in some cases excellent—quality and accessibility. Canada is a country identified by the United Nations as having one of the highest standards of living in the world, offering students a relatively safe and affordable environment in which to study. Canada also has the lowest tuition fees among its major competitors.

As a bilingual and multicultural nation, Canada has developed quality second-language and cross-cultural training programs that offer students unique learning opportunities and the chance to study in two major international languages.

Methodology

The study was carried out over the course of a four-month period. Information on global and domestic international student trends (as compiled by sources such as Statistics Canada; the Canadian Bureau for International Education; Industry, Science and Technology Canada; and UNESCO) was supplemented with materials provided by Canadian embassies and the national departments of education in both target and competitor countries.

An extensive questionnaire was distributed to selected Canadian missions. The questionnaire asked about each target country's demographics, domestic educational supply and demand, and international education consumption. In addition to providing statistical data in response to these questions, missions shared highly relevant qualitative insights into the educational market situation in their host country. Missions informally and formally surveyed student groups to identify factors that influenced education destination preferences and their perceptions of Canada as a potential place to study.

Additionally, a questionnaire focussing on international student policies, enrolment levels and marketing practices was distributed to Canadian missions in the competitor countries. The Political, Economic and Public Affairs Section at Canada House in London compiled an extensive amount of information in conjunction with the National Department of Education in Britain, the British Council and the Visa Section at the British Home Office. The Public Affairs Section at the Canadian Embassy in Washington supplied useful information on international education in the United States, and the Canadian High Commission in Wellington, in conjunction with the New Zealand Ministry of Education and Department of Labour, furnished information on New Zealand. Co-ordinated by Canada's High Commission in Canberra, information on Australia's educational marketing efforts and policies came from a variety of sources, including various Australian government publications and departments (the Department of Employment, Education and Training; the Department of Immigration, Local Government and Ethnic Affairs; and the Australian Trade Commission).

The information was analysed to identify pertinent international student trends, effective promotional and marketing efforts, and marketing constraints, as well as to recommend a future course of action for the marketing of Canadian educational services and products in Asia Pacific.

Summary of Findings

- There is surging demand for international education services in Asia Pacific. Even with no concerted marketing efforts, the Asia Pacific region is still the largest source of international students for Canada as well as for each competitor country. About 3 percent of the international students from this region go to Canada to study.
- Canada has many qood educational institutions offering quality services and products. Canada invests more in its educational programs than do competitor countries.
- While some Canadian institutions are doing well in marketing their services, many stakeholders think we could be doing better in terms of attracting more quality student applications and making our educational presence better known in the region.
- In relation to competitor countries, our educational marketing efforts have been fragmented, uncoordinated, fitful and inconsistent. No one organization in Canada speaks with authority on behalf of all educational institutions.
- Diplomatic missions in Asia Pacific are facing staff reductions and budgetary cutbacks that hinder our ability to capitalize on the growing educational marketing opportunities in the region.
- Canada's international student market share could be lost to competitor countries if a more cohesive marketing strategy is not adopted. We need to get our educational marketing act together.
- Improved marketing would enhance awareness of the Canadian option in Asia Pacific and contribute to short- and long-term economic growth and increased job creation in Canada.
- The growth rate in the number of international post-secondary students in Canada has not kept pace with the rate in competitor countries or with the growth in the international student population globally.
- While the numbers of students coming to Canada from other countries have generally increased over the past 10 years, 1992 statistics showed a slight decline. The proportion of international students to the total student population, however, has not changed significantly over this period. International students, over the past decade, have continued to account for only 4 percent of the post-secondary student population in Canada.
- The demand for international education in many Asia Pacific countries is shifting from traditional undergraduate university education to graduate-level courses and to specialized training offered by international business schools, community colleges, and public and private language schools.

- Many international students and their families choose Canada as a destination for its quality of education as well as its "safe" environment.
- However, large numbers of international students do not consider Canada as a destination for study because of the lack of information about our educational institutions.
- Many students do not apply to Canadian education institutions because of a shortage of scholarships and the length of the time it takes for visa processing.
- Canada offers one of the most affordable university educations in the international education marketplace. In fact, differential fees for international students which do not generally reflect full cost-recovery, may be too low.

Recommendations

- Vigorously pursue establishing Canadian Education Centres in key Asia Pacific markets along the lines of those established in Taipei and Seoul. These offices should, to the extent possible, be established on a cost-recovery basis. They would:

  1) actively market Canadian educational institutions and programs and enhance awareness of Canada as a destination for study by counselling prospective students, conducting regular information seminars, producing a news bulletin in the local language and organizing education fairs;

  2) provide regular marketing intelligence and analysis to Canadian educational exporters and track market trends and developments; and

  3) facilitate in the identification and development of educational partnerships and linkages between Canadian and Asian academic institutions.

- Develop specific marketing strategies for target countries to match student needs to available Canadian programs.
- Provide regular market analysis to Canadian instititutions.
- Encourage Canadian institutions to develop a mechanism that would enable them to easily quantify the spaces available for international students in all programs.

- Establish a mechanism for in-Canada co-ordination (an education marketing body) to address issues of information dissemination, standards and quality control, streamlined application procedures and deadlines, credential evaluation, program capacities, etc. Work in conjunction with the Council of Ministers of Education Canada (CMEC), the Association of Universities and Colleges of Canada (AUCC), the Association of Canadian Community Colleges (ACCC) and the Canadian Bureau for International Education (CBIE).

- Develop an in-Canada communications strategy to develop awareness of education market opportunities in Asia Pacific and the benefits to Canada of educational exchange. Develop a guide to education marketing in Asia Pacific for education exporters.

- Develop promotional materials—videos, slides, guides to study in Canada, interactive computer programs—to assist international students in their selection.

- Establish a federal/provincial scholarship plan to attract top-calibre students from target countries.

- Ensure Canadian education fairs in the region are regular and co-ordinated.

- Continue to streamline student visa application procedures with immigration sections at Canadian embassies. Prepare new information kits on how to apply.

- Encourage the establishment of more "twinning" linkages and educational exchanges between Canadian and Asian educational institutions.

- Encourage more co-op placement programs and business-sector involvement in the education process.

1. HOW COMPETITIVE IS CANADA IN THE INTERNATIONAL EDUCATION MARKETPLACE?

The remainder of this paper will examine Canada's competitiveness in the international education marketplace. Section 1 will review intake patterns of international students, Section 2 will highlight the key issues of supply and demand and will identify factors influencing the intake of students. Section 3 will look at the Canadian international education "product"—including issues of quality, availability and pricing. Section 4 will examine the competitors' international education "product" and promotional activities. Lastly, Section 5 will examine the demand for international education in the 10 target countries.

1.1 Canadian International Education in the Global Context

In 1990-91 there were approximately 1.5 million post-secondary students studying outside their country of origin. Canada received approximately 3 percent of the world's share that year, and ranked sixth among host countries.

In 1991, the top destinations for international students were:

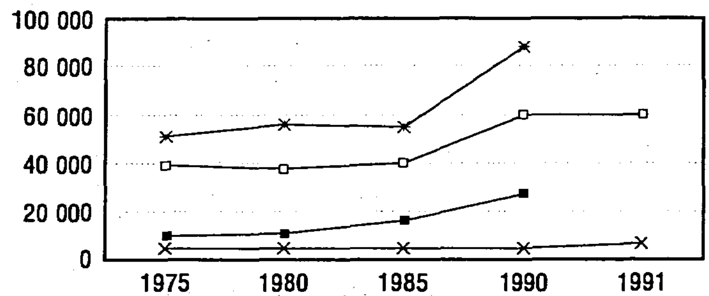
1) the United States
2) France
3) Germany
4) the United Kingdom
5) the Union of Soviet Socialist Republics
6) Canada
7) Belgium
8) Australia
9) Japan
10) Switzerland

(Note: New Zealand ranked 36th)

Between 1975 and 1990 the number of international post-secondary students studying in Canada increased by 56 percent. In the same period, however, the United Kingdom experienced a growth rate of 78 percent, the numbers in the United States increased by 127 percent, and Australia's intake increased by 247 percent (Chart 1.11). As a point of reference, the global international student population increased by approximately 110 percent during this period. The Canadian Bureau for International Education (CBIE) has suggested that the trend toward increased international student mobility will continue in the 1990s.

1.11

A COMPARISON OF INTERNATIONAL TERTIARY STUDENT POPULATION

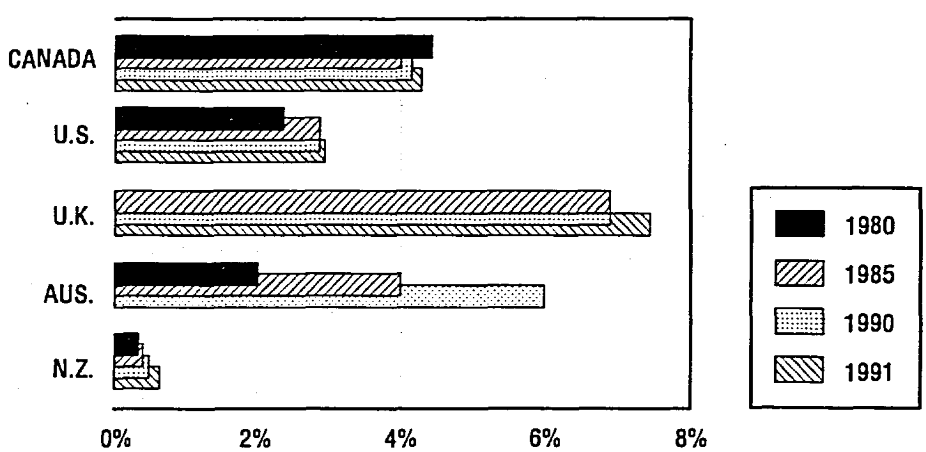


CANADA —□—	38 854	36 475	38 760	60 648	59 105
U.K. —✳—	49 032	56 003	53 694	87 500	
AUS. —■—	8 356	8 777	16 075	28 993	
N.Z. —×—	2 965	2 468	2 568	3 538	4 835

Note: U.S. totals have not been included on graph.
Source: Statistics Canada; Canadian embassies

1.12

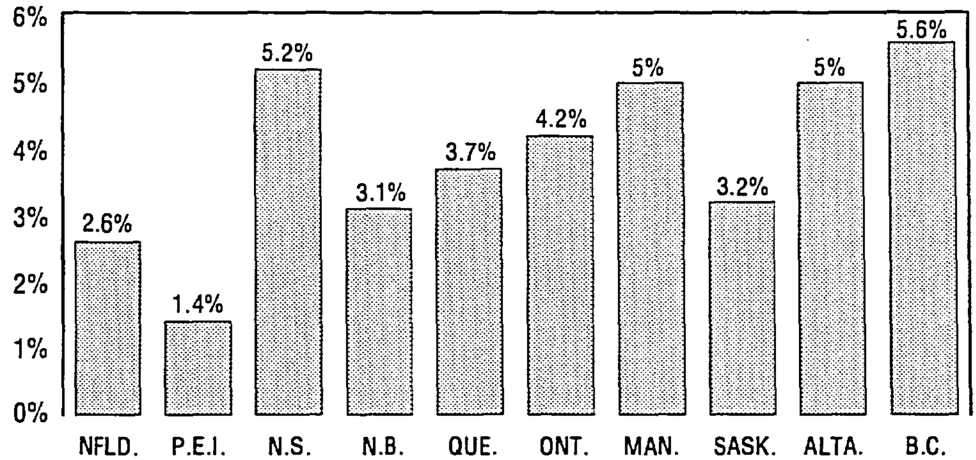
INTERNATIONAL POST-SECONDARY STUDENT POPULATION AS A PERCENTAGE OF DOMESTIC STUDENT POPULATION



Source: Statistics Canada; Canadian embassies; UNESCO

1.13

INTERNATIONAL UNIVERSITY STUDENTS IN CANADA AS A PERCENTAGE OF TOTAL STUDENT POPULATION, BY PROVINCE, 1990



Source: Statistics Canada

Over the past decade, international students have fairly consistently represented 4 percent of the student population in Canada. In terms of level of study, however, the distribution of international students has shifted from undergraduate-level studies to college- and graduate-level programs. The percentage of international students in competitor countries ranges from 1 percent to 7.5 percent (Chart 1.12).

Ontario attracts more international students than any other province. The next most popular destinations for international students are schools in Quebec, British Columbia and Alberta. When looking at international students as a percentage of total student population, however, British Columbia has the highest percentage of international students, followed by Nova Scotia, Alberta and Manitoba (Chart 1.13).

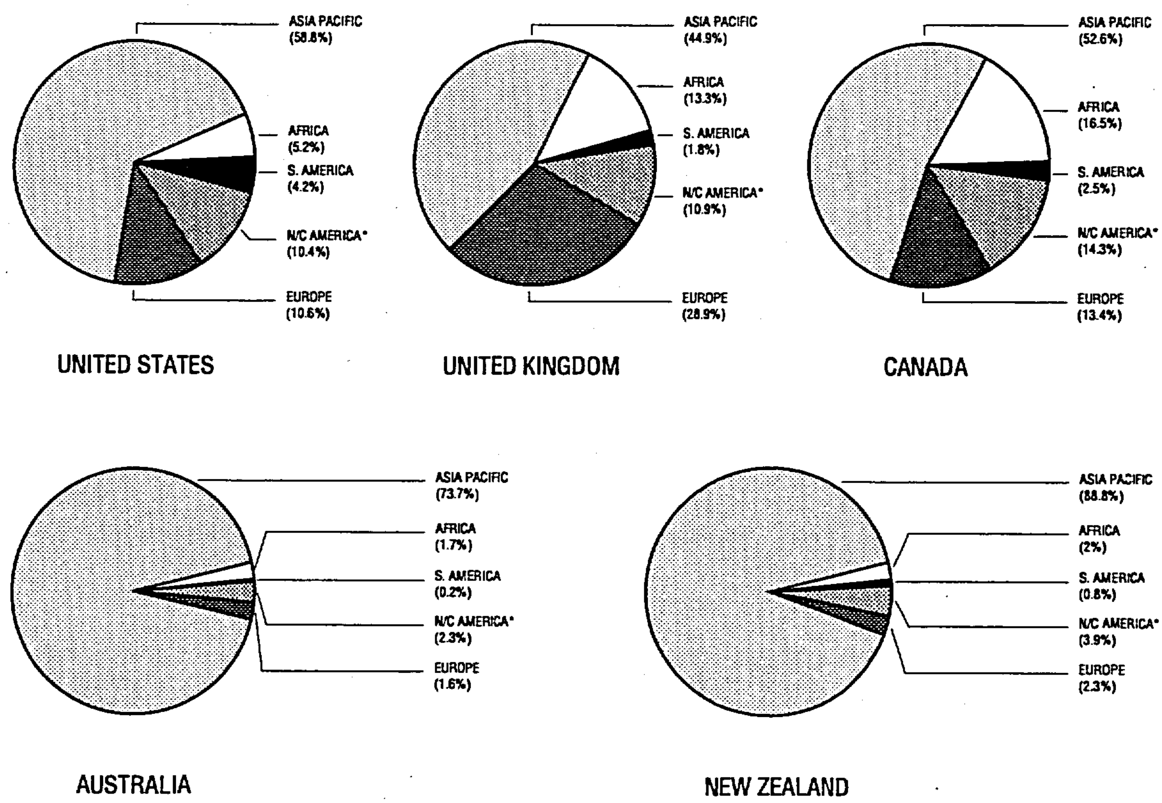
1.2 International Students from the Asia Pacific Region

The Asia Pacific region represents the major source of international students for all competitor countries (Chart 1.21).

According to the Organization for Economic Co-operation and Development's *1991 Annual Statistical Report*, Canada receives about 3 percent of all Asian students studying internationally (Chart 1.22).

1.21

INTERNATIONAL POST-SECONDARY STUDENT POPULATION, BY MAJOR HOST COUNTRY AND REGION OF ORIGIN

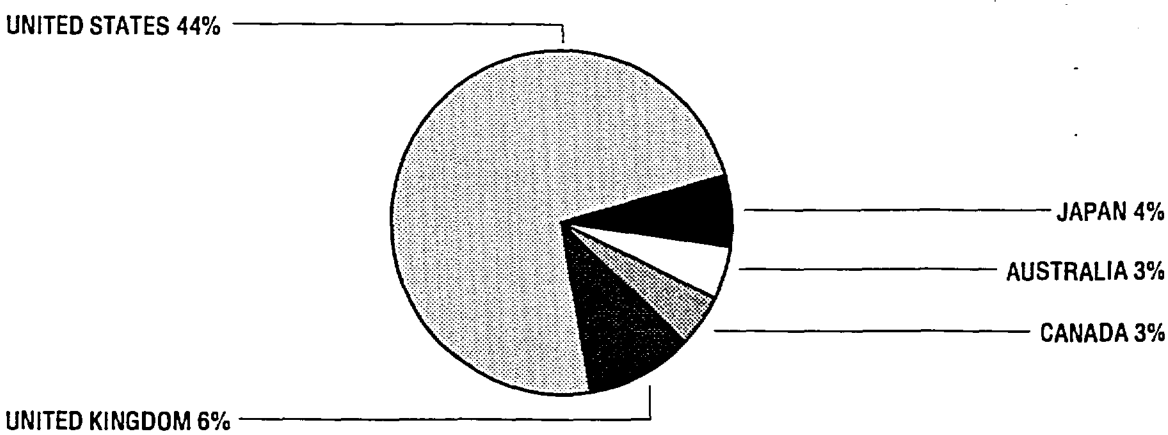


** North and Central America*
Source: UNESCO Statistical Yearbook 1992

The proportion of international students in Canada coming from the Asia Pacific region has steadily increased since the mid-1970s. In 1991, approximately 46 000 students, representing close to 60 percent of all international students in Canada, at all levels of study (elementary, secondary and post-secondary) came from the Asia Pacific region (Chart 1.23). Of the 59 000 international students at the post-secondary level in 1991, 33 000 came from Asia Pacific countries.

1.22

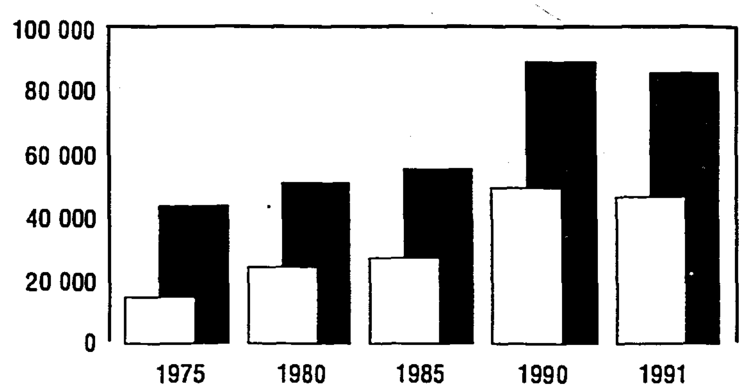
MARKET SHARE OF INTERNATIONAL STUDENTS FROM ASIA PACIFIC



Source: OECD Annual Statistical Report 1991

1.23

INTERNATIONAL STUDENTS IN CANADA FROM ASIA PACIFIC

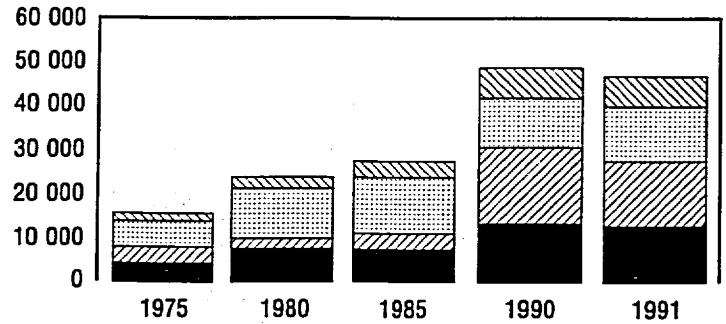


	1975	1980	1985	1990	1991
ASIA PACIFIC ☐	14 579	23 980	26 846	48 944	46 153
TOTAL ■	42 436	49 563	53 823	87 005	83 695

Source: Statistics Canada

1.24

STUDENTS IN CANADA FROM ASIA PACIFIC, BY LEVEL OF STUDY AND BY YEAR

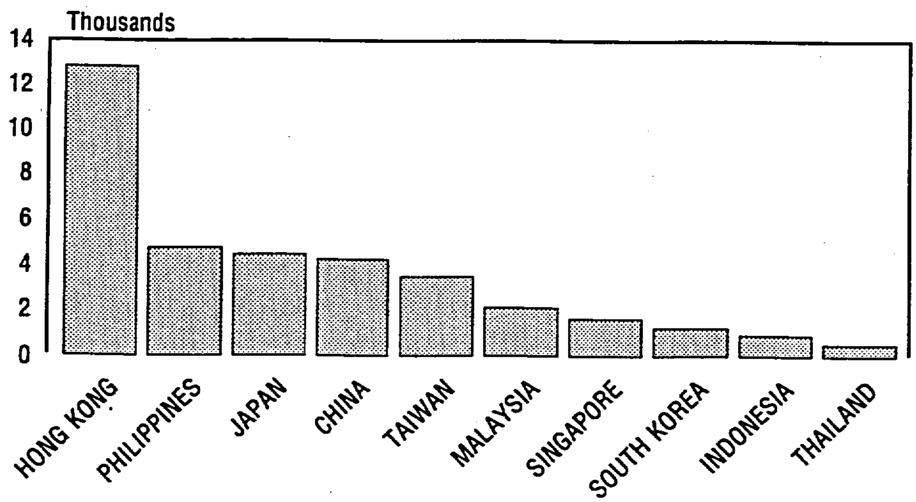


	1975	1980	1985	1990	1991
GRADUATE	1 675	2 599	3 575	6 952	6 801
UNDERGRADUATE	5 465	11 394	12 510	11 191	12 251
COLLEGE/TRADE	3 469	2 396	3 608	17 459	14 544
ELEM/SECONDARY	3 970	7 591	7 153	13 342	12 557

Source: Statistics Canada

1.25

INTERNATIONAL STUDENTS IN CANADA FROM MAJOR ASIA PACIFIC SOURCE COUNTRIES, 1991



Source: Statistics Canada

While the number of students from this region has steadily increased and continues to represent a majority of all international students in Canada, there has been a change in the consumption patterns of these students. Though the number of students coming to Canada for an undergraduate university education has remained fairly consistent since the early 1980s, there has been a significant increase in the number coming to Canada at the college and trade school level, as well as a lesser yet still significant increase in the number studying at the graduate level (Chart 1.24). The number of college and trade school students increased by 58 percent between 1989 and 1990, and declined slightly (a 17-percent decrease) in 1991.

In 1991-92, 6 of the 10 top source countries for international students were Asia Pacific nations. The major Asia Pacific source countries of international students in Canada are identified on Chart 1.25.

2. INTERNATIONAL EDUCATION—ISSUES OF SUPPLY AND DEMAND

2.1 Domestic and External Factors

Although specific factors influencing the demand for international education vary from country to country, there are some key factors that tend to influence international student mobility.

Domestic factors include the availability of higher education, the perceived value of an international education, the relative wealth of the population, the relevancy of the knowledge gained in a host country to the job market at home, and government policies that affect the freedom of the population to pursue education overseas (such as mandatory military service). Factors specific to each target country are highlighted in Section 5.

External factors also influence the demand for international education. These include the reputation of the host country and of its educational institutions, the living environment, its perceived openness to foreign cultures, the cost of education in the host country, its capacity to accept international students in specific programs of study, the availability of information on educational institutions and programs, climate and the relative ease of obtaining a student visa and permission to work. External factors specific to the host countries are highlighted in Sections 3 and 4.

Factors influencing the decision of students to study abroad are summarized in Table 2.11.

2.11

FACTORS INFLUENCING STUDENTS' DECISION TO STUDY ABROAD (Domestic and External Factors)

■ Economics	- state of home and host country economy
■ Immigration Policies	- ease of obtaining student visa - ability to obtain work while studying
■ Supply of Quality Higher Education	- availability of home country programs - name recognition of educational institutions - availability and perceived value of host country education - admission requirements in home and host country's institution
■ Affordability of Education	- cost of home country education - availability of scholarships to study in host country - host country's policy in regard to differential fees
■ Marketing and Promotion	- degree of educational marketing activities by host country - availability of information on host country educational programs
■ Environment	- personal safety issues - perceived openness to foreign cultures and people
■ Bilateral Relations	- historical relationship with host country - knowledge of host country relevant to career opportunities - general perception of host country
■ Climate	

3. CANADIAN EDUCATION MARKET

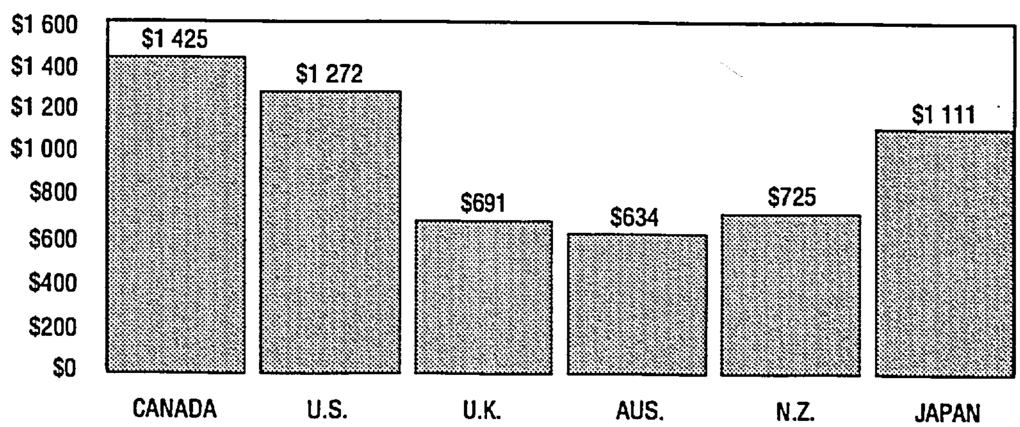
3.1 The "Product"

For the purposes of this survey, the "product" is defined as Canada's educational curricula and programs, and is examined in relation to the quality of product offered in competitor nations.

Canada invests more in education per capita than any other country (Chart 3.11). However, according to *Maclean's* (January 11, 1993), Canada scored in the middle of 15 countries—ahead of France, Scotland, Spain, the United States, Ireland and Jordan—on a comprehensive international survey of educational standards in science and mathematics at the high school level. In a report prepared by Kultural Econometrics International (October 1992), Canada was ranked in the mid-range of a group of 22 countries in terms of its compulsory education being perceived as superior to competitors and in terms of its educational system meeting its competitive needs. While these sources suggest that a Canadian education might be of medium quality, they also show Canada outperforming and outranking some competitor nations (Australia, New Zealand and the United Kingdom).

3.11

INVESTMENT IN EDUCATION: PUBLIC EDUCATION SPENDING PER CAPITA



Source: Kultural Econometrics International Report on Higher Education

3.12

PERCEPTIONS OF CANADA AND STUDYING IN CANADA

	Strengths	Weaknesses
JAPAN	▪ Safe ▪ Moderate cost of living ▪ High quality education ▪ Good reputation of schools and programs ▪ No prejudice against Japan	▪ Takes too long to obtain visa ▪ Insufficient information ▪ Lack of jobs related to Canada ▪ Not well known in Japan ▪ Two official languages
SOUTH KOREA	▪ Quality education ▪ Stable society ▪ Reasonable cost of tuition and living	▪ Insufficient information ▪ Takes too long for visa processing
HONG KONG	▪ Low fees ▪ Safe environment ▪ Immigration potential	▪ Medical requirements ▪ Delay in visa processing
MALAYSIA	▪ Low tuition and cost of living ▪ Safe social climate ▪ World-class universities ▪ Good career prospects ▪ Immigration potential	▪ Admission requirements; high TOEFL* scores needed ▪ Complex application process ▪ Limited information ▪ Visa processing time ▪ Climate ▪ Few scholarships
THAILAND	▪ Quality education ▪ Reasonable tuition ▪ Relatively safe	▪ Lack of information ▪ Few scholarships ▪ Difficult to obtain visas ▪ Too cold
SINGAPORE	▪ Low cost of tuition ▪ Good job prospects ▪ Quality education ▪ Availability of information ▪ Relative ease of getting visa	▪ Too far from home ▪ Large increases in tuition fees
PHILIPPINES	▪ Low tuition	▪ Academic qualifications not recognized in Canada ▪ Difficulty in obtaining visa
INDONESIA	▪ Safe environment ▪ Reasonable tuition	▪ Cold ▪ Limited knowledge about Canada ▪ Distance from home ▪ High TOEFL* requirements ▪ Visa application process

** Test of English as a Foreign Language*

Students' perceptions of the quality of education offered in another country, however, are usually tied to factors such as the country's international image, name recognition of an educational institution, and word-of-mouth recommendations from friends, family and teachers. Students give much consideration to quality of the overall experience of living in a particular country, in addition to the quality of education being offered (Table 2.11).

Therefore, "selling" education in Canada involves selling not only a high-quality educational product, but also the cultural experience and environment that go along with it. This study found that students considering an education overseas are often attracted to Canada for its safe, clean and affordable living environment (Table 3.12).

3.13

CANADA'S COMPETITIVE ADVANTAGE

- CANADA OFFERS HIGH-QUALITY EDUCATIONAL OPPORTUNITIES IN ALL DISCIPLINES AND AT ALL LEVELS OF STUDY
- CANADA IS A WORLD LEADER IN SECOND-LANGUAGE EDUCATION METHODS AND CURRICULUM DEVELOPMENT
- CANADA OFFERS HIGHER EDUCATION IN TWO MAIN INTERNATIONAL LANGUAGES
- THE CANADIAN ENGLISH ACCENT IS CONSIDERED A "PREFERRED" ACCENT
- CANADA HAS FIRST-CLASS HEALTH CARE AT AFFORDABLE RATES
- CANADA IS AFFORDABLE–TUITION, TRAVEL AND LIVING COSTS ARE CHEAPER THAN THOSE OF KEY COMPETITORS
- CANADA IS CONSIDERED TO BE A STABLE, SAFE, CLEAN AND FUN LIVING ENVIRONMENT
- CANADA IS MULTICULTURAL. THERE ARE OVER 850 000 CANADIANS OF ASIAN ORIGIN LIVING IN CANADA

Canada's competitive advantage in international education marketing is summarized in Table 3.13. Canada has much to offer as an experienced, reputable and innovative provider of high-quality educational services in all disciplines and at all levels of study. With its multicultural population, Canada has developed world-renowned curricula and teaching methods in English and French as a second language. Canadian English has been identified as a preferred accent by many international students.

3.2 Pricing Issues

Even with the establishment of differential fees for international students in the early 1980s, Canada still offers one of the most affordable university educations in the international education marketplace (Chart 3.21).

Seven out of 10 Canadian provinces impose differential tuition fees at universities, which range from two to six times the domestic fees. (Newfoundland, Saskatchewan, and Manitoba do not charge differential fees.) Ontario, which has the highest differential fees at the undergraduate level in the country, also has the highest enrolment of international students. Differential fee policies in Canada appear to have had minimal effect on the overall number of students coming to study.

The manner in which universities benefit from differential fee revenues varies by province. Whereas many universities are concerned that government funding is insufficient and view the differential fees as an additional indirect source of revenue, some expressed concern at the thought of having to depend on differential fees as a source of funding and possibly having to compromise on the quality of students being accepted to their institution.

Although information on the comparative cost of college-level education was not available, it was found that colleges generally have more direct control over the fees charged to international students. Higher fees for overseas students at this level can help to offset operating costs and be put toward enhancing the range of programs and services for all students attending the college.

In surveys evaluating the importance of various factors taken into consideration by international students in the target countries, it was found that cost of tuition and general cost of living ranked high on the list (Table 3.22). Although Canada compares favourably with competitor countries regarding the cost of university education for international students and cost of living, the fact that there are almost no scholarships at the undergraduate level for these students is perceived quite unfavourably by students in target countries that are developing nations.

3.21

COMPARISON OF UNDERGRADUATE TUITION FEES FOR INTERNATIONAL STUDENTS, 1990-91

	MINIMUM FEES	MAXIMUM FEES
CANADA	$1 364	$10 877
U.S.	$2 657	$25 000
U.K.	$8 889	$21 574
AUS.	$7 027	$21 960
N.Z.	$5 200	$11 700

Note: Fees have been converted to Canadian funds.
Source: Canadian embassies

3.22

IMPORTANCE OF TUITION COST AND AVAILABILITY OF SCHOLARSHIPS WHEN CHOOSING AN INTERNATIONAL EDUCATION PROGRAM

Ranked in importance on a list of 12 or more determining factors taken into consideration when choosing international education

	COST OF TUITION AND LIVING	SCHOLARSHIPS
JAPAN	2	3
CHINA	1	2
SOUTH KOREA	7	12
TAIWAN	2	3
HONG KONG	1	10
MALAYSIA	1	4
THAILAND	2	1
SINGAPORE	1	4
PHILIPPINES	3	2
INDONESIA	1	2

Source: Student survey compiled by Canadian embassies

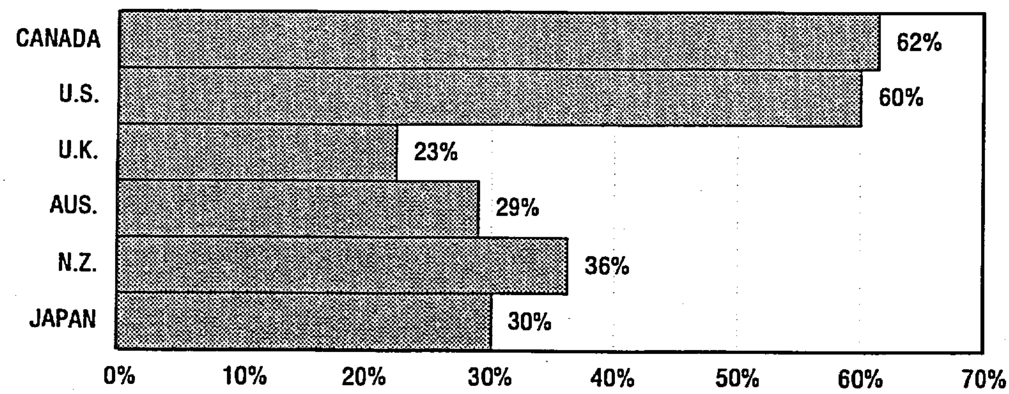
3.3 Capacity

The Canadian higher education system comprises vocational and technical schools, community colleges and universities. Technical schools, colleges and CÉGEPs (general academic and vocational colleges in Quebec) grant diplomas or certificates, while universities grant degrees ranging from baccalaureate to doctoral. In 1992 there were 203 colleges and 69 universities in Canada. Although the capacity to accept international students at each of these institutions and in different programs varies, there are some overall enrolment trends.

Canada has a higher percentage of its population aged 20-24 enrolled in higher education than any of the competitor countries (Chart 3.31). Post-secondary enrolment has increased by 16 percent in the past three years. Across Canada, student enrolment at the undergraduate level has grown by 3 percent in the past three years (Table 3.32). During the same period, international student enrolment at the undergraduate level increased by approximately 10 percent.

3.31

ACCESS TO HIGHER EDUCATION: DOMESTIC POPULATION AGED 20-24 ENROLLED IN HIGHER EDUCATION



Source: Kultural Econometrics International Report on Higher Education

3.32

CANADIAN EDUCATION MARKET

- Population — - 27 million (1992); population growth rate 0.8%
  - 29 million (2000) projected
- Per capita GNP — - US$21 750; -0.2% growth projected (1993)
- Domestic education — - 203 colleges (1992); full-time enrolment 348 400 (1992)
  - 69 universities (1992); full-time enrolment 572 900 (1992)
- Total full-time college enrolment increased until 1985-86, when it reached 322 200. Between 1985 and 1990 enrolment dropped by about 2% to 317 300. Enrolment in the early 1990s has increased by a rate between 1 and 4%.
- Total full-time undergraduate enrolment has increased steadily since the early 1980s. Since 1988-89, the rate of increase has been about 3%.
- Total full-time graduate enrolment has also grown since the 1980s. The average annual rate of increase since 1987 has been about 4%.

Source: Statistics Canada

After a slight drop in enrolment in the late 1980s, enrolment at community colleges peaked at a record high in 1992. Enrolment levels have increased by approximately 6 percent each year since the early 1990s. International enrolment at colleges during the same period increased at a rate of about 37 percent.

In spite of the faster growth in international student enrolment versus domestic student enrolment in the early 1990s, international students represent only about 4 percent of Canada's total student enrolment (Chart 1.12).

According to an article in *The Globe and Mail* (June 18, 1993), post-secondary educational institutions in Ontario received a significantly higher number of applications from Canadian high-school graduates in 1993 than in previous years, and had limited spaces available for these students due to budgetary constraints.

While it is clear that there has been an increased domestic demand for space in Canada's post-secondary institutions, it does not necessarily follow that Canada should limit its acceptance of international students. In fact, in cases where differential fees paid by international students go directly to educational institutions, international tuition fees can help create more spaces for domestic students.

Some school boards in Canada have also become involved in marketing their programs to international students—particularly students in their last few years of secondary education. According to the CBIE's annual report, some 40 percent of post-secondary international students in Canada have attended a Canadian secondary school.

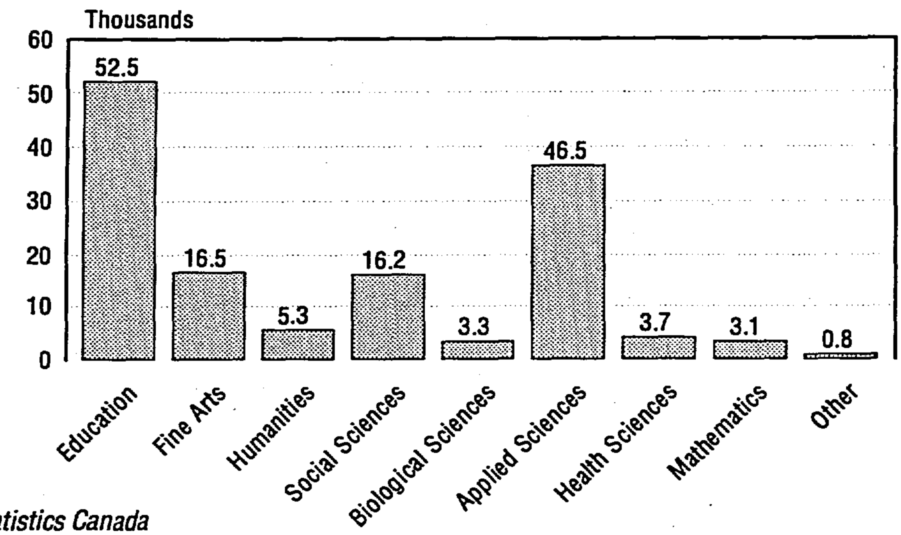
Enrolment of full-time students at Canadian universities by field of study is outlined in Chart 3.33. The fields with the largest percentage of international students are mathematics and applied sciences (Chart 3.34). The international student population at various universities in Canada is highlighted on Chart 3.35. McGill University has the highest percentage of international students in Canada, followed by Simon Fraser University and the University of Toronto.

A university's capacity to accept international students could be linked to the number of spots freed by Canadian students pursuing an international education. In 1988, there were a total of 18 433 Canadians pursuing their education outside the country. There were just under twice that number of international university students in Canada in the same year. Only 3 percent of Canadians studying outside the country studied in the Asia Pacific region.

The anticipated growth in the Canadian student population is outlined in Chart 3.36. Trends show a levelling off from the high numbers in the mid-1980s.

3.33

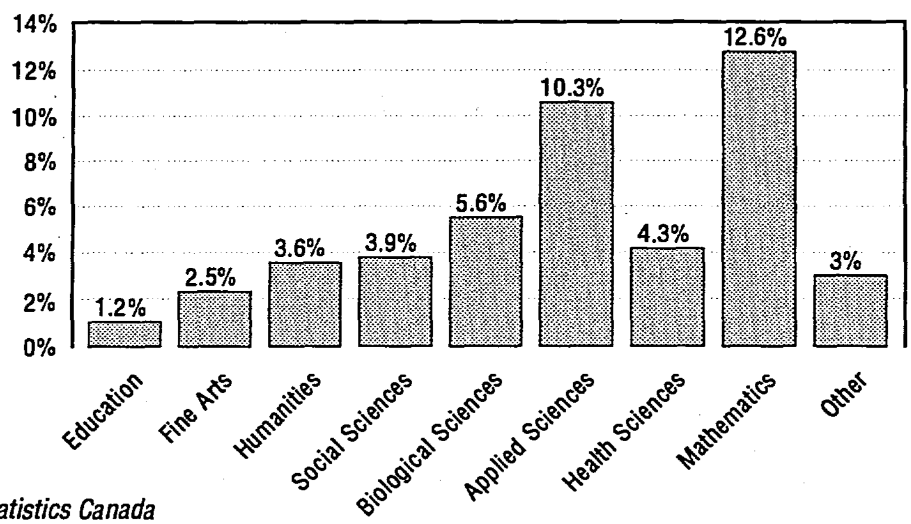
ENROLMENT OF FULL-TIME STUDENTS, BY FIELD OF STUDY AT CANADIAN UNIVERSITIES, 1989



Source: Statistics Canada

3.34

DISTRIBUTION OF INTERNATIONAL STUDENTS, BY FIELD OF STUDY AS A PERCENTAGE OF TOTAL STUDENTS, 1991



Source: Statistics Canada

3.35

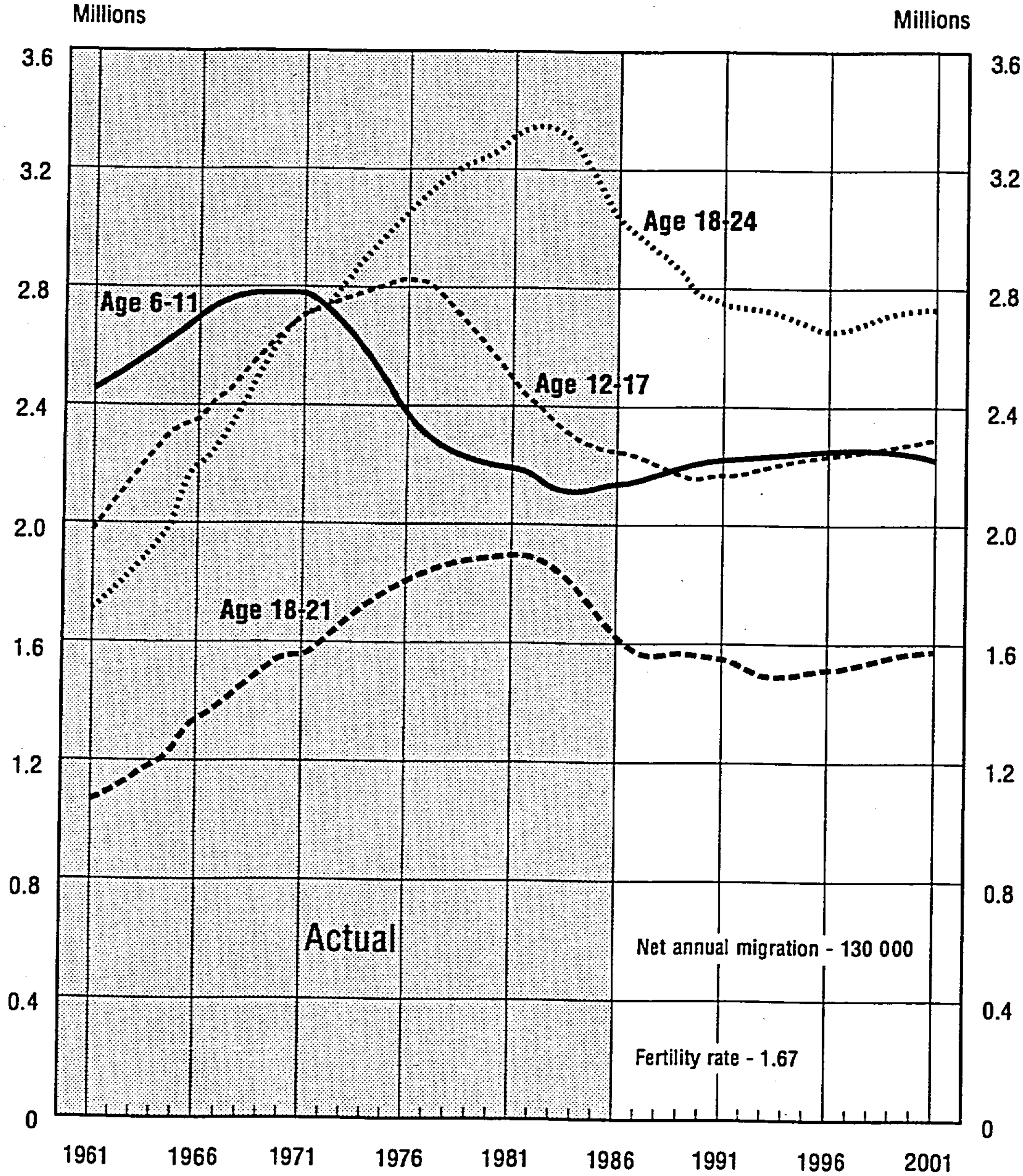
INTERNATIONAL STUDENTS AT TOP 20 CANADIAN UNIVERSITIES, 1990-91

University	Number of International Students	Percentage of International Students	University	Number of International Students	Percentage of International Students
TORONTO	3 697	6.7	CALGARY	1 175	5.2
McGILL	2 805	10.2	WESTERN ONTARIO	979	3.4
MONTREAL	2 256	4.1	CONCORDIA	977	3.8
YORK	1 900	4.7	WATERLOO	946	4.0
ALBERTA	1 685	5.8	OTTAWA	890	3.5
BRITISH COLUMBIA	1 586	5.6	CARLETON	865	4.2
LAVAL	1 341	3.8	McMASTER	731	4.3
QUEBEC	1 328	1.6	WINDSOR	649	4.2
MANITOBA	1 179	4.8	QUEEN'S	629	3.6
SIMON FRASER	1 176	7.3	SASKATCHEWAN	587	3.0

Source: Statistics Canada; CBIE Report on International Students

3.36

AGE GROUP POPULATIONS OF RELEVANCE TO SCHOOL ENROLMENT, CANADA, 1961-2001



Source: Statistics Canada

3.4 Promotion

Canadian educational institutions and associations have shown intensified interest in international markets, including those in Asia Pacific, and have undertaken a range of international promotional activities. These promotional efforts have included participation in education fairs, use of in-country education agencies, direct advertising, involvement with on-site overseas educational projects, alumni associations, participation in national umbrella associations or non-governmental organizations such as the Association of Universities and Colleges of Canada (AUCC), the Association of Canadian Community Colleges (ACCC), the Canadian Bureau for International Education (CBIE) and World University Service of Canada (WUSC), as well as providing Canadian embassies with promotional literature to distribute to potential students.

Strong competition, a low Canadian profile and a fragmented approach to marketing Canadian educational services, however, have been cited as some of the key challenges faced by Canadian education exporters. Canadian institutions, active in the international marketplace and interested in attracting a greater share of international students, have expressed strong interest in developing a co-ordinated approach to marketing Canadian education internationally.

3.41

PROBLEMS CITED BY STUDENTS APPLYING TO STUDY IN CANADA

- Length of time required for obtaining student authorizations and medicals
- Lack of information about our institutions, such as calendars and application forms
- Complex application forms and process (including phone-in course selections, insistence on students sending original documentation)
- Late admission decisions (notification in July is late for international students who need to obtain student authorization)
- Poor response rate from Canadian institutions in replying to overseas applicants
- Few scholarships are available to study in Canada
- Problems with academic qualifications being recognized in Canada and with Canadian qualifications being recognized at home
- Entrance requirements; the required TOEFL scores are higher than in other countries
- Shortage of space in priority programs
- Required to show "proof of funds" for one year
- Summer courses in Canada do not coincide with "summer" holidays in many Asia Pacific countries

Source: Canadian embassies; student questionnaires

Chart 3.41 outlines some of the problems international students have encountered in applying to Canadian educational programs. All of these issues—including student visa processing, international student application procedures, and notification of acceptance—deserve attention if Canada is to maintain or enhance its level of competitiveness in the region.

3.5 Immigration Policies

Highlights of changes in Canadian immigration policy relevant to international students are outlined on Chart 3.51.

3.51

HIGHLIGHTS OF CANADIAN STUDENT IMMIGRATION POLICY

1973 - Exemption from employment validation introduced for co-op study programs

1978 - Implementation of Immigration Act, 1976 and regulations

1985 - General interest courses do not require student authorizations

1986 - Cost-recovery fees introduced, but not applied to student authorizations
- Revision of financial guidelines for students

1988 - Broadening of employment provisions for international students allowing:
- university and community college students to work on campus
- spouses of university and community college students to work anywhere
- university and community college students to work for one year after graduation in a job related to field of study
- CIDA students to work anywhere

1989 - Students taking English-or French-language courses of less than 90 days are exempt from student authorization (Bill C-55)
- student authorizations are valid for the duration of a post-secondary program
- long-term, multiple-entry visas are provided to correspond to student authorizations
- open authorizations are granted, allowing students to move between institutions at a given level of study

1990 - Canada Immigration Centre (CIC) Service task force begins to look at standardizing and streamlining practices at "inland" CICs, including a pilot "drop-off" or "mail-in" service

1991 - Student authorization fee of $75 introduced

1992 - Student authorization fee raised to $100

Source: Canada Employment and Immigration

4. EDUCATION MARKETING ACTIVITIES OF KEY COMPETITOR COUNTRIES

4.1 Australia

Australia has a population of 16 million people and has fewer than 30 universities. Prior to 1986, the number of overseas students in Australia was controlled by an annual quota system, and these students were either partly or fully subsidized by the government through aid programs.

Since 1986, Australian universities and other educational institutions have offered places to overseas students at full cost. In 1989, the Australian government identified education marketing as a priority commodity and Asia as a priority market, and established the Australian Education Centre (AEC) system. There are currently nine AECs in Asia Pacific, located in Fiji, Hong Kong, Indonesia, South Korea, Malaysia, the Philippines, Singapore, Taiwan and Thailand.

Since 1986, the number of international students in Australia has increased from 22 000 (2 000 fee-paying) to approximately 54 000 (48 000 fee-paying) in 1991. The Australian government has estimated that over A$1 billion (approximately C$892 million) is generated annually as a result of the fees and other payments made by the increased numbers of international students. It reports that the $300–$400 million in fees collected by the educational institutions enables the provision of buildings, teachers and resources that benefit international and Australian students.

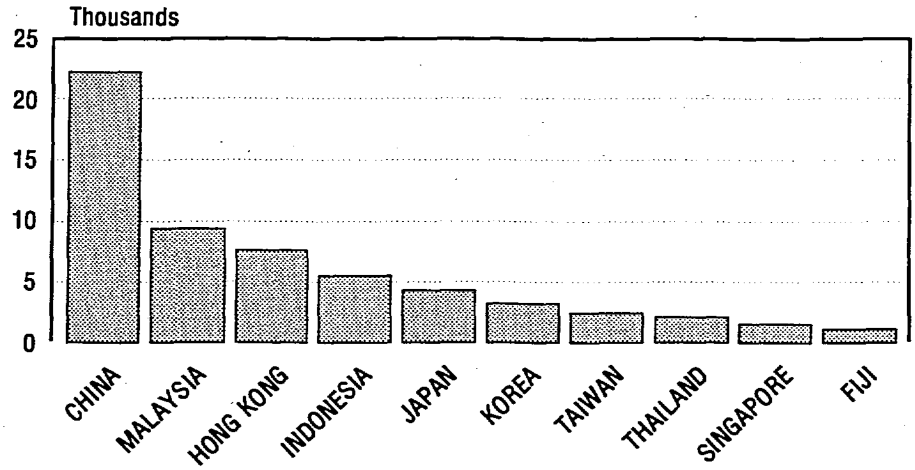
The Australian Education Centres are funded in part by subscription fees paid to educational institutions, by application processing fees and by other means.

Australia has benefited from its proximity to the South and Southeast Asian Pacific markets and from the establishment of a co-ordinated approach to marketing, including the presence of AECs in the region.

Canada can learn much from the Australian approach, both from the challenges encountered and the successes experienced.

4.11

INTERNATIONAL STUDENTS IN AUSTRALIA FROM MAJOR ASIA PACIFIC SOURCE COUNTRIES, 1990



Source: Canadian Embassy in Australia

4.12

PERCEPTIONS OF AUSTRALIA AND STUDYING IN AUSTRALIA

	Strengths		Weaknesses
JAPAN	▪ Safe environment ▪ Good climate ▪ Moderate cost ▪ Japanese teaching program		▪ Frequent changes in government policies (including visa requirements) ▪ Australian accent ▪ Australian education undervalued ▪ Difficulties obtaining visa ▪ Difficulties obtaining scholarships
SOUTH KOREA	▪ Easy to obtain visa ▪ Sufficient information available ▪ Mild climate ▪ Reasonable tuition and living cost		
MALAYSIA	▪ Proximity ▪ Climate ▪ Availability of scholarships ▪ Agents throughout Malaysia ▪ One-stop shopping		▪ Costs ▪ Commercialization of education ▪ Anti-Asian reputation
THAILAND	▪ Proximity ▪ Availabilty of information	▪ Availabilty of scholarships ▪ Affordable tuition	▪ Australian accent
SINGAPORE	▪ Proximity ▪ Program offerings ▪ Climate	▪ Quality of education ▪ Availability of information ▪ Job prospects	▪ Costs

Source: Statistics Canada

Student Visas

To be granted a student visa, students must be a genuine applicant for entry to Australia as a student; be accepted for a full-time course of study registered by the Australian government; seek only temporary entry to Australia without intent to become a permanent resident; have adequate means of support for the duration of the course; provide evidence of adequate health insurance; provide evidence that arrangements have been made for any school-age dependant; and meet Australian health and public interest requirements. (Most will require a medical and X-ray examination before a visa is granted.)

International students are permitted to work no more than 20 hours per week while the course is in session. Family members who accompany the student are generally considered in the same visa class (certain stipulations apply), and are permitted to work up to 20 hours a week. Family members of students enrolled in a masters degree or doctoral program have unrestricted work rights.

4.2 New Zealand

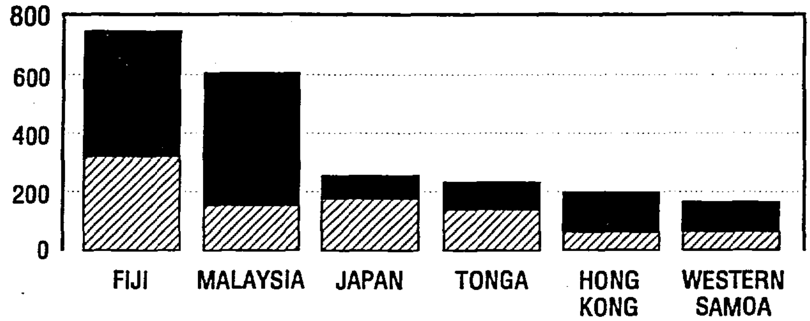
New Zealand, with a population of just 3.4 million and a correspondingly small secondary and post-secondary education system, has opened Education Advisory Offices in its Asian embassies.

Student Visas

International students wishing to study in New Zealand must apply for a student permit and meet certain financial conditions before the visa or permit is approved. Students interested in undertaking employment while on a student visa must make special application for permission to work.

4.21

INTERNATIONAL STUDENTS IN NEW ZEALAND FROM MAJOR ASIA PACIFIC SOURCE COUNTRIES AND BY LEVEL OF STUDY, 1992



	FIJI	MALAYSIA	JAPAN	TONGA	HONG KONG	WESTERN SAMOA
UNIVERSITY	426	451	93	129	134	107
COLLEGE	320	156	178	117	61	48

Source: Canadian Embassy in New Zealand

4.22

PERCEPTIONS OF NEW ZEALAND AND STUDYING IN NEW ZEALAND

	Strengths	Weaknesses
JAPAN	▪ Safe environment ▪ Good climate ▪ Friendly ties with Japan	▪ Lack of information ▪ Lack of awareness of New Zealand ▪ Limited number of schools accepting foreign students
SOUTH KOREA	▪ Easy to obtain visa (1 week) ▪ Good climate ▪ Reasonable tuition and living cost	▪ Educational institutions not well-known
MALAYSIA	▪ Competitive fees ▪ Reasonable cost of living ▪ Scholarships available ▪ Entering twinning arrangements ▪ Making special places available for Malaysian students ▪ Availability of information through agents	▪ Not well-known
THAILAND	▪ Lower fees	▪ Not well-known (Foreign students accepted after 1989)
SINGAPORE	▪ Proximity ▪ Climate ▪ Education system similar to U.K. ▪ Availability of information	▪ Tuition fees ▪ Few Singaporeans studying in New Zealand

4.3 United Kingdom

The British Council promotes British culture, language, and education and training services overseas. The Council is represented in more than 90 countries, where it runs 162 offices, 118 libraries and 56 English teaching centres.

The Education Counselling Service (ECS), an arm of the British Council, actively promotes British post-secondary education, as well as providing students with counselling and referral services. It is funded in part by subscriptions from British universities, polytechnics and other institutions.

The ECS has 162 subscribers, including almost all universities and polytechnics in the United Kingdom as well as many colleges of art, technology, higher and further education and independent institutions. The service operates in Malaysia, Hong Kong, Singapore, Japan, Brunei, South Korea and Cyprus.

The British Council has outlined a "Code of Practice," consisting of 82 points pertaining to international student recruitment policy, issues and practices. Polytechnics and private language schools must undergo accreditation by the British Council.

The United Kingdom introduced full-cost fees for international students in the mid-1980s. While this initially had a negative impact on the number of international students studying in the United Kingdom, this number quickly recovered. (It should be noted that European Community (EC) countries have made an agreement by which all member states charge "home student" fees to students from EC countries.)

Student Visas

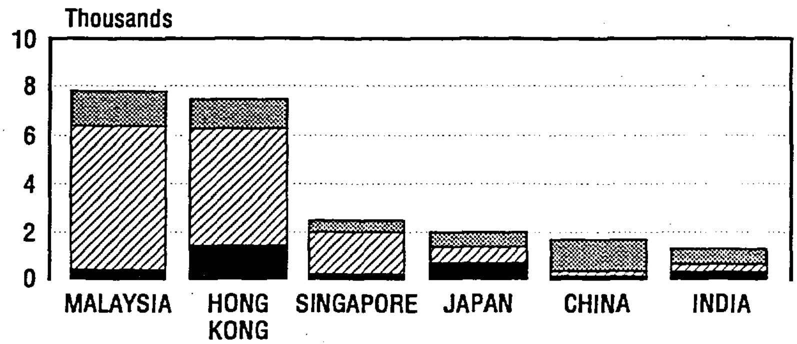
Nationals from Hong Kong, South Korea, Japan, Malaysia and Singapore do not require visas to enter the United Kingdom for temporary purposes such as studying. They can make their case for entry directly to the immigration officer on arrival in Britain.

To qualify as a student, the person must be on a full-time course of study, normally involving at least 15 hours of daytime study a week, and must demonstrate the capability to support and accommodate him or herself and dependants without working. International students may, however, undertake part-time employment (of no more than 20 hours a week) with the approval of the Department of Employment.

If the individual intends to remain in the United Kingdom for more than six months, a medical certificate may be required.

4.31

INTERNATIONAL STUDENTS IN THE UNITED KINGDOM FROM MAJOR ASIA PACIFIC SOURCE COUNTRIES AND BY LEVEL OF STUDY, 1991



	MALAYSIA	HONG KONG	SINGAPORE	JAPAN	CHINA	INDIA
POSTGRADUATE	1 300	1 300	500	700	1 500	700
UNDERGRADUATE	6 000	5 000	1 900	400	100	200
NON-ADVANCED	600	1 400	100	700	100	200

Source: Canadian High Commission, United Kingdom; British Council

4.32

PERCEPTIONS OF THE UNITED KINGDOM AND STUDYING IN THE UNITED KINGDOM

	Strengths		Weaknesses
JAPAN	▪ Wide variety of programs ▪ Language schools ▪ Flexibility of start dates ▪ No visa requirement ▪ High quality education ▪ Location for European travel		▪ Insufficient information on programs (other than language schools) ▪ High cost of living ▪ Ambiguous entrance requirements
SOUTH KOREA	▪ Many reputable schools ▪ No visa required		▪ Higher tuition and living costs
MALAYSIA	▪ Reputation ▪ Quality of education ▪ Scholarships	▪ Accepted on forecast marks ▪ Information availability ▪ Twinning programs	▪ Costs
THAILAND	▪ Quality programs ▪ Valued education ▪ Successful role models	▪ Accent ▪ Simple visa process	
SINGAPORE	▪ Quality of education ▪ Reputation ▪ Historic ties ▪ Job prospects after graduation ▪ Education system closest to Singapore's ▪ Presence of British Council		▪ High tuition

4.4 United States

The United States ranks as the number one destination for international students around the world. In 1992, there were approximately 420 000 international students studying in the United States, with more than 50 percent of these coming from Asia Pacific countries.

In addition to having information on colleges and universities available at most U.S. embassies, the United States has about 100 offices worldwide dedicated to promoting study in the United States. There are many guides to U.S. education available on a commercial basis, and many institutions handle much of their own marketing and recruitment activities.

The following programs, associations and agencies are very involved in the international education process in the United States: the United States Information Agency, the Fulbright-Hays program, the Institute for International Education, the Council for International Education Exchange, and the National Association of Foreign Student Advisers.

In 1992, over 60 percent of the international students in the United States were self-funded, almost 20 percent were on institutional scholarships and fewer than 2 percent were studying on U.S. government funding.

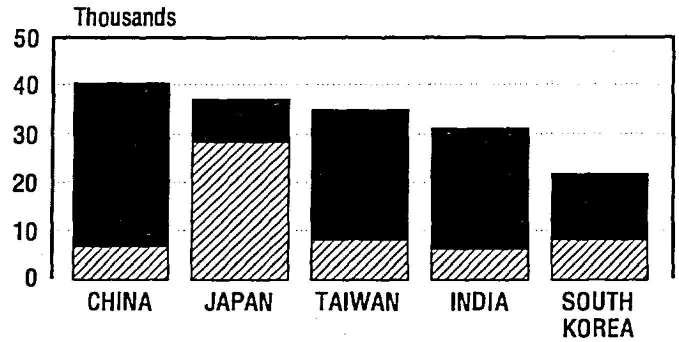
The United States declared an income of over US$5 billion from international education in 1991.

Student Visas

Individuals applying for a student visa to the United States must show proof of financial competence to pay for their tuition and must provide the required documentation. While no medical requirements are needed to acquire a visa, applicants are generally required by their host institution to acquire comprehensive health insurance. (Visa processing time required is generally one day, if all documents are in order.)

4.41

INTERNATIONAL STUDENTS IN UNITED STATES FROM MAJOR ASIA PACIFIC SOURCE COUNTRIES AND BY LEVEL OF STUDY, 1991



	CHINA	JAPAN	TAIWAN	INDIA	SOUTH KOREA
GRADUATE ■	34 459	7 081	24 138	25 536	14 737
UNDERGRADUATE ▨	6 331	28 734	9 350	5 953	8 410

Source: Canadian Embassy in the United States

4.42

PERCEPTIONS OF THE UNITED STATES AND STUDYING IN THE UNITED STATES

	Strengths	Weaknesses
JAPAN	▪ Wide variety of programs ▪ Abundance of information ▪ Credit transfers accepted by Japanese universities ▪ Successful role model	▪ Unsafe environment
SOUTH KOREA	▪ Many reputable schools ▪ Availability of information ▪ Close academic linkages ▪ Easy to obtain student visa	▪ Higher tuition and living costs ▪ Safety problem in cities
MALAYSIA	▪ Reputation in technology ▪ Lower TOEFL requirement ▪ Accepts SPM level ▪ Quality of education ▪ More scholarships ▪ Reasonable cost of living ▪ Information available	▪ Safety ▪ Visa procedures ▪ High fees at prestigious schools
THAILAND	▪ Abundance of information ▪ Many scholarships and bursaries available ▪ Lower TOEFL requirements ▪ Thai community ▪ Range of educational opportunity	▪ Crime ▪ Tuition fees
SINGAPORE	▪ Quality of education ▪ Tuition lower than U.K. ▪ Job prospects after graduation ▪ Availability of information ▪ Less emphasis on final exams than U.K. system	▪ Distance from home

SOUTH KOREA

5.11

SOUTH KOREAN EDUCATION MARKET

■ Population	- 43.6 million (1992) - 44.8 million (1995 projected) - 46.8 million (2000 projected)
■ Capital	- Seoul; population 11 million (1992)
■ Per capita GNP	- US$ 6 685 (1992); 6.3% growth projected (1993) vs US$ 1 592 (1980)
■ Domestic education	- 121 universities and colleges Total number of spaces available: 211 740 (1992) Total number of applicants: 903 952 (1992) - 126 junior colleges Total number of spaces available: 159 410 (1992) Total number of applicants: 488 957 (1992)
■ Secondary school enrolment	percentage of secondary school age group 1960s, 35%; 1970s, 56%; 1990s, 89%

- Adult literacy: 95%
- South Korea ranked #1 in an international survey of educational standards testing 13 year olds in science and mathematics

Source: Canadian Embassy, South Korea; CIDA

5.12

SOUTH KOREAN STUDENTS' DEMAND FOR INTERNATIONAL EDUCATION

■ Estimated total number of Korean students studying outside Korea	1983: 18 199 1990: 53 875	1985: 24 315 1991: 73 528	
■ Estimated total number of Korean students studying in English-speaking countries	1990: 30 000	1991: 38 000	
■ Destinations of Korean students studying in English-speaking countries	U.S. 80% U.K. 3%	Australia 6-7% Canada 1.8%	
■ Korean university students overseas	U.S. 1991:	Undergraduate level Graduate level Total	8 410 14 737 23 147
	Canada 1991:	Undergraduate level Graduate level Total	99 128 227
■ Korean students studying at colleges in Canada	1990: 286	1991: 507	

Source: Canadian Embassy, South Korea; CIDA

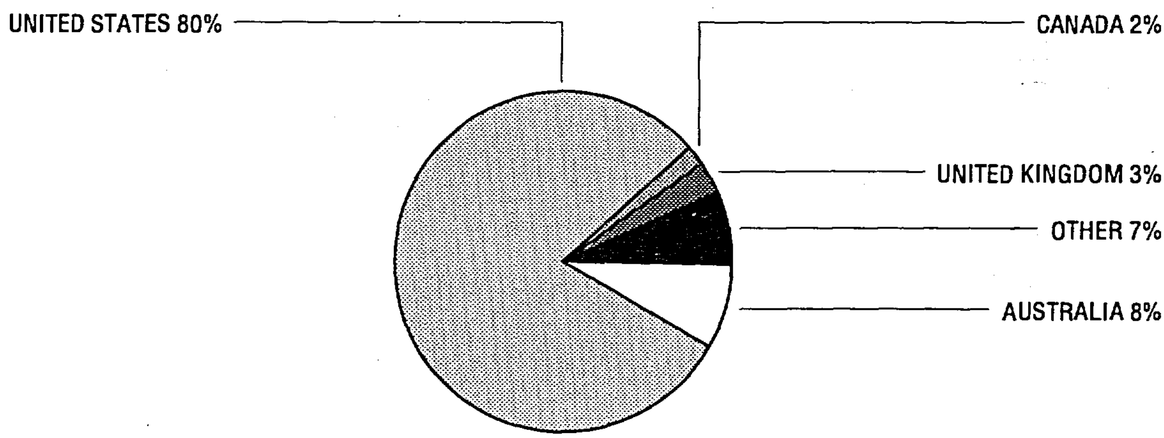
5.13

TOP INTERNATIONAL EDUCATION DESTINATIONS FOR SOUTH KOREAN UNIVERSITY STUDENTS

1980	1985	1990	1992
1. U.S.	1. U.S.	1. U.S.	1. U.S.
2. SWITZERLAND	2. SWITZERLAND	2. SWITZERLAND	2. SWITZERLAND
3. U.K.	3. U.K.	3. AUSTRALIA	3. AUSTRALIA
	4. GERMANY	4. U.K.	4. U.K.
		5. CANADA	5. CANADA/SINGAPORE

5.14

SOUTH KOREA–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 38 000 Koreans studying in English-speaking countries.
Note: Graph shows percentage of total Koreans studying in English-speaking countries.

5.15

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM–UNIVERSITIES AND COLLEGES (4-YEAR COURSES), SOUTH KOREA

CLASSIFICATION	ADMITTED	APPLICANTS
Natural Sciences	89 985	326 795
Social Sciences	51 380	257 618
Humanities	32 360	158 951
Arts and Physical Education	16 785	89 988
Teaching Profession	13 565	45 244
Medical and Pharmacy	7 665	25 356

5.16

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM–JUNIOR COLLEGES (2- OR 3-YEAR COURSES), SOUTH KOREA

CLASSIFICATION	ADMITTED	APPLICANTS
Natural Sciences	78 110	246 418
Social Sciences	33 380	103 608
Medical and Pharmacy	17 290	46 649
Arts and Physical Education	16 850	51 566
Teaching Profession	7 040	22 948
Humanities	6 740	17 770

5.17

HIGHEST COURSE ENROLMENT BY PROGRAM, DOMESTIC ENROLMENT IN SOUTH KOREA

■ Humanities (Linguistics, Literature)	English Language	5 737
■ Social Sciences	Business Administration	10 358
■ Natural Sciences	Computer Science	3 664
	Chemistry	4 042
	Mechanical Engineering	4 132
	Electronic Engineering	5 560

JAPAN

5.21

JAPANESE EDUCATION MARKET

- Population — - 123 million (1992); population growth rate 0.4%
  - 129 million (2000) projected
- Per capita GDP — - US$25 000 (1990); 3.5% growth projected (1993)
- Domestic education — - 3 406 colleges (1992)
  1 215 415 student population (1992)
  - 523 universities (with undergraduate programs) (1992)
  2 184 057 undergraduate student population (1992)
  313 graduate schools (1992)
  109 108 graduate student population (1992)
- The student population, and the number of universities and colleges, are expected to remain unchanged over the next few years.

Source: Canadian Embassy, Japan; Far Eastern Economic Review, March 1993

5.22

JAPANESE STUDENTS' DEMAND FOR INTERNATIONAL EDUCATION

- Estimated total number of Japanese students studying outside Japan — 1980: 14 279; 1985: 23 830; 1990: 121 645; 1991: 120 362

  (Note: above figures include business people, high school students and others)

- Japanese students in Canada

	1987	1990	1991
college:	42	1 835	2 085
university:	226	488	702

- Foreign vocational certificates and diplomas are not recognized by Japanese law. Credits obtained at universities outside Japan are not recognized by all Japanese universities.
- There are mixed perceptions of the value of an international education. Some believe that graduating from a Japanese university is preferable for employment.
- Advantages of an international education include improving linguistic ability and knowledge of other cultures.
- Pursuing second-language programs internationally can be viewed as a sightseeing opportunity.
- Many students go abroad for studies after failing to enter a Japanese university.
- Possible areas of opportunity for international educators:
  - English as a second-language programs (both short- and long-term programs)
  - Vocational training (hotel management, secretarial courses, fine arts, cosmetology)
  - One-year programs at university (in international relations, social sciences)
  - Graduate studies (business, urban planning, development studies, gerontology, communications)

Source: Canadian Embassy, Japan; Japanese student questionnaires

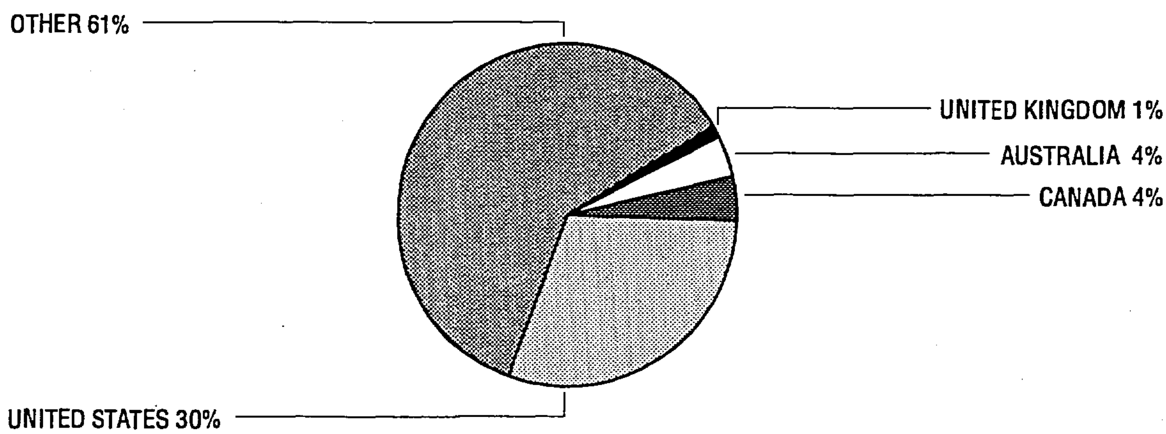
5.23

TOP INTERNATIONAL EDUCATION DESTINATIONS FOR JAPANESE UNIVERSITY STUDENTS

1980		1985		1990		1992	
U.S.	9 050	U.S.	11 248	U.S.	24 000	U.S.	31 521
FRANCE	1 216	WEST GERMANY	1 128	WEST GERMANY	1 200	WEST GERMANY	1 240
WEST GERMANY	1 152	CHINA	521	FRANCE	843	CHINA	1 112
PHILIPPINES	425	AUSTRALIA	230	CHINA	806	FRANCE	920
ITALY	330	CANADA	212	U.K.	557	U.K.	817

5.24

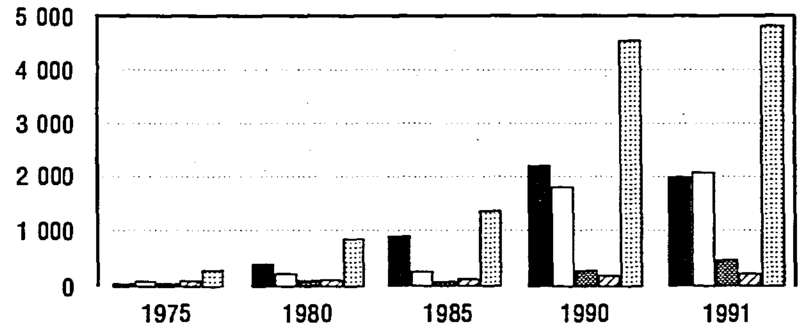
JAPAN–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 120 000 Japanese students and business people studying internationally. Note: Percentages reflect share of international students only.

5.25

STUDENTS IN CANADA FROM JAPAN, BY LEVEL AND BY YEAR



	1975	1980	1985	1990	1991
ELEMENTARY/SECONDARY ■	41	386	894	2 233	2 003
COLLEGE/TRADE □	80	219	252	1 835	2 085
UNDERGRADUATE	48	98	74	290	479
GRADUATE	89	114	123	198	223
TOTAL	258	817	1 343	4 556	4 790

Source: Statistics Canada

5.26

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM–UNIVERSITIES, JAPAN

Programs in highest demand	Programs with highest enrolment	Programs with lowest acceptance rate
■ Information Science	■ Information Science	■ Cultural Studies
■ International Relations		
■ Cultural Studies		
■ Space Science		
■ Environmental Studies		

Source: Canadian Embassy, Japan; student surveys

5.27

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM–COLLEGES, JAPAN

Programs in highest demand	Programs with highest enrolment	Programs with lowest acceptance rate
▪ Information Science	▪ Information Science	▪ Cultural Studies
▪ Social Science		
▪ International Relations		
▪ Cultural Studies		
▪ Children's Education		

Source: Canadian Embassy, Japan; student surveys

HONG KONG

5.31

HONG KONG EDUCATION MARKET

- Population - 5.7 million (1991)
  - 6 million (2000) projected
- Per capita GDP - US$14 177 (1991); 5.6% growth projected (1993)
  - US$3 482 (1980)
- Domestic education - 5 colleges (1991)
  - 5 825 student population (1991)
  - Degree-granting institutions:
    3 universities and 4 polytechnics (1991),
  - 39 313 student population (1991)
- Higher education institutes in Hong Kong can accommodate 80 percent of qualified candidates.
- The primary and secondary school population is expected to gradually decline in future years. Tertiary-level student population will increase by 20 percent from 1992 to 1995.
- Higher education demand (percent of higher education age group): 1989, 8%; 1995, 18% projected. The government has increased the provision of higher education places substantially to meet demand.
- Secondary school enrolment (percentage of secondary school age group): 1960s, 29%; 1970s, 49%; 1990s, 74%.
- Adult literacy: 88%

Source: Canadian Embassy, Japan; Far Eastern Economic Review, March 1993

5.32

HONG KONG STUDENTS' DEMAND FOR INTERNATIONAL EDUCATION

- It has been estimated that for every five local students studying in Hong Kong, four are studying overseas (44 percent of students study overseas)
- Of the territory's current population, 1.2 percent has graduated from a Canadian university (source: *Canada/Hong Kong Business Magazine*, March 1993).
- An estimated 36 110 Hong Kong students are studying at the tertiary-level outside Hong Kong (1990).
- Destinations of tertiary-level Hong Kong students studying internationally: U.S. (35%), Canada (25%), U.K. (20%), Australia (12%).
- Hong Kong students studying in Canada

	1987	1990	1991
elementary/secondary	3 898	4 655	3 734
college	1 248	2 827	2 313
undergraduate	5 653	5 921	6 451
graduate	492	451	442

5.33

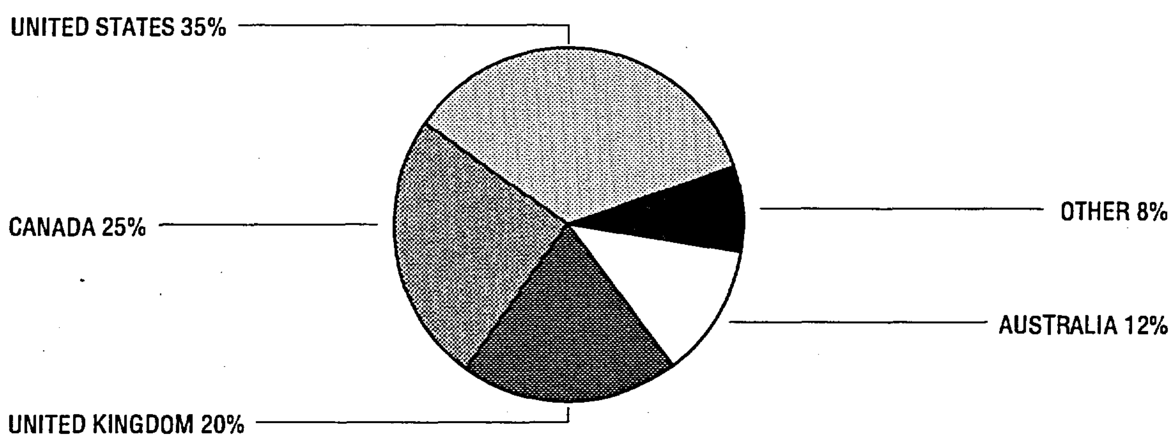
TOP INTERNATIONAL EDUCATION DESTINATIONS FOR HONG KONG TERTIARY-LEVEL STUDENTS

1980		1985		1990	
U.S.	9 900	U.S.	10 710	U.S.	12 630
U.K.	7 231	CANADA	8 507	CANADA	9 199
CANADA	5 772	U.K.	6 978	U.K.	7 346
		AUSTRALIA	1 678	AUSTRALIA	4 348

Source: Hong Kong government, Education and Manpower Branch

5.34

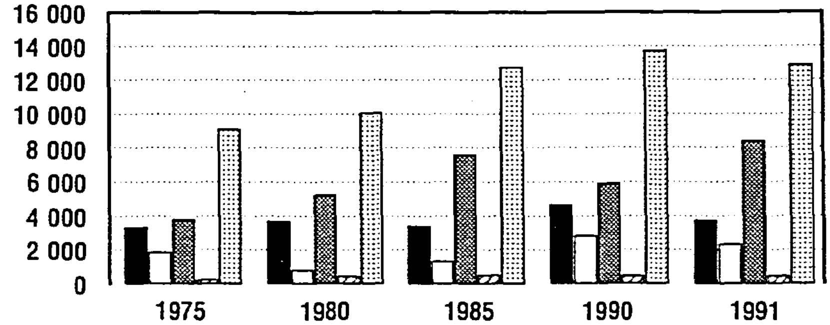
HONG KONG–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 36 000 students from Hong Kong studying internationally.

5.35

STUDENTS IN CANADA FROM HONG KONG, BY LEVEL AND BY YEAR



	1975	1980	1985	1990	1991
ELEMENTARY/SECONDARY ■	3 292	3 623	3 404	4 655	3734
COLLEGE/TRADE □	1 818	779	1 309	2 827	2313
UNDERGRADUATE	3 761	5 173	7 661	5 921	8451
GRADUATE	205	410	508	451	442
TOTAL	9 076	9 985	12 882	13 854	12 940

Source: Statistics Canada

TAIWAN

5.41

TAIWAN EDUCATION MARKET

■ Population	- 20.7 million (1992)
■ Per capita GNP	- US$10 082 (1992); 7% growth projected (1993)
■ Domestic education	- 100 colleges (1991), includes junior colleges, public and private 315 000 student population (1991) - 21 universities (1991), public and private 239 000 student population (1991)
■ Higher education demand	- Total number of applicants 161 055 (1990) - Total number who passed entrance exam 50 500 (1990) - About 34 percent of university applicants in Taiwan are accepted.
■ Secondary school enrolment (percentage of secondary school age group)	1970s, 73%; 1990s, 94%

- Taiwan ranked #2 in an international survey of educational standards testing 13 year olds in science and mathematics.

Source: Taiwan Ministry of Education

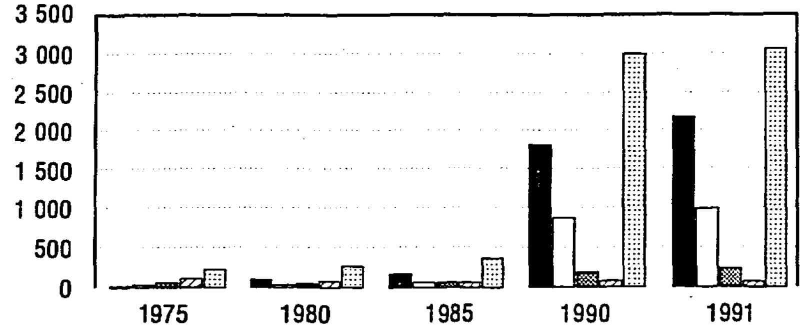
5.42

TOP INTERNATIONAL EDUCATION DESTINATIONS FOR TAIWANESE STUDENTS

The top destinations for Taiwanese students have remained unchanged since 1989:
1. U.S., 2. Japan, 3. United Kingdom, 4. Canada, 5. Australia, 6. New Zealand.

5.43

STUDENTS IN CANADA FROM TAIWAN, BY LEVEL AND BY YEAR



	1975	1980	1985	1990	1991
ELEMENTARY/SECONDARY	19	97	178	1 823	2 179
COLLEGE/TRADE	33	34	68	885	1 004
UNDERGRADUATE	61	49	67	192	242
GRADUATE	110	77	66	79	76
TOTAL	223	257	379	2 979	3 051

Source: Statistics Canada

5.44

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM, TAIWAN

CLASSIFICATION	PASSED EXAMINATION	APPLICANTS
Engineering and Natural Sciences	27 451	69 652
Law and Social Sciences	24 738	99 640
Humanities	5 412	28 972
Medical Sciences and Agriculture	5 016	14 460

MALAYSIA

5.51

MALAYSIAN EDUCATION MARKET

■ Population	- 18 million (1992); population growth rate 2.5% - 20 million (1995) projected - 22 million (2000) projected
■ Per capita GDP	- US$2 330 (1990); 8% growth projected (1993) - US$1 402 (1980)
■ Domestic education	- 8 colleges (1990); 8 projected by 1995 - 5 polytechnics (1990); 10 projected by 1995 - 28 teacher colleges (1990); 33 projected by 1995 - 7 universities (1990); 15 projected by 1995 Total spaces available: 10 688 (1991/92) Total number of qualified applications: 25 730 - 50 000 (1991/92)

- Malaysia admits less than 20 percent of qualified Chinese and Indian students

■ Secondary school enrolment: (percentage of secondary school age group)	1960s, 28%; 1970s, 42%; 1990s, 59% With secondary school capacity increasing by 8 percent, more students will be attending and graduating with SPM "O" level (equivalent to Ontario Grade 12).

- The secondary school population is expected to increase by 31 percent from 1990 to 1995.

■ Adult literacy:	74%

Source: Canadian High Commission, Malaysia; CIDA - Asia Branch; Far Eastern Economic Review, March 1993

5.52

MALAYSIAN STUDENTS' DEMAND FOR INTERNATIONAL EDUCATION

- Estimated total number of Malaysian students studying outside Malaysia:
  1980 (29 726), 1985 (34 535), 1990 (52 000), 1992 (58 254)
- Malaysian students in Canada
  1980: 5 996 (151 sponsored), 1985: 3 357 (630 sponsored), 1990: 2 282 (524 sponsored)
- Malaysia is currently facing a severe shortage of well-qualified scientists, professionals, managers, engineers and skilled technicians. It is estimated that at least 75 percent of Malaysian students at universities abroad are studying business (accounting, marketing), engineering (electrical, civil) or computer science.
- As Malaysia admits less than 20 percent of qualified Chinese and Indian students (i.e. non-Bumiputra) into state institutions of post-secondary education, tens of thousands of qualified students must seek non-state post-secondary education.
- In 1980, 47 percent of all Malaysian students at university (19 510 out of 41 554) were studying overseas (28 percent of all Bumiputra students, 63 percent of all Chinese students, and 68 percent of all Indian students).
- In 1985, 37 percent of all Malaysian students at university (22 684 out of 60 522) were studying overseas (20 percent of all Bumiputra students, 54 percent of all Chinese students, and 56 percent of all Indian students).
- Malaysian government sponsorship is available for Bumiputra to study both locally and overseas. Non-Malays, the largest consumers of international education, generally do not receive government sponsorship.
- It is generally viewed as advantageous to have studied overseas. The public service department recognizes degrees.
- There is a growing demand for English as a second-language courses, and insignificant demand for French second-language courses.
- The demand for graduate and upper undergraduate studies is increasing.
- Malaysian schools are participating in university twinnings and off-shore campuses.

Source: Canadian High Commission, Malaysia; Education Canada, Malaysia

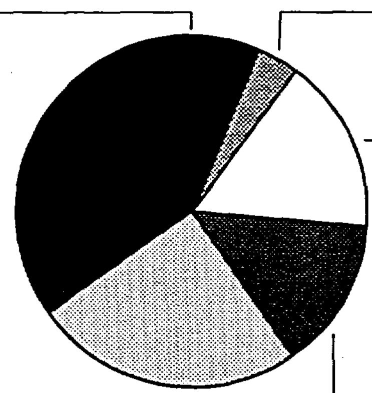
5.53

TOP INTERNATIONAL EDUCATION DESTINATIONS OF MALAYSIAN STUDENTS

1980	1985	1990	1992
U.K.	U.S.	U.S.	U.S.
U.S.	AUSTRALIA	U.K.	U.K.
AUSTRALIA	U.K.	AUSTRALIA	AUSTRALIA
CANADA	CANADA	CANADA	CANADA
NEW ZEALAND		NEW ZEALAND	NEW ZEALAND

5.54

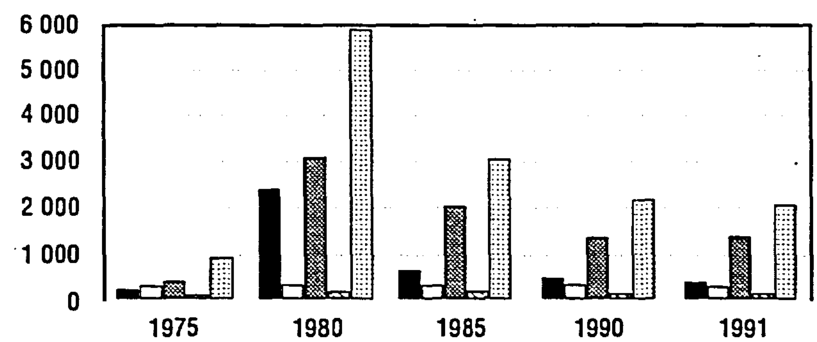
MALAYSIA–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 58 000 students from Malaysia studying internationally.

5.55

STUDENTS IN CANADA FROM MALAYSIA, BY LEVEL AND BY YEAR



	1975	1980	1985	1990	1991
ELEMENTARY/SECONDARY ■	204	2 405	665	463	375
COLLEGE/TRADE □	285	289	305	310	271
UNDERGRADUATE	388	3 117	2 192	1 405	1 465
GRADUATE	70	140	163	104	100
TOTAL	947	5 951	3 325	2 282	2 211

Source: Statistics Canada

5.56

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM, MALAYSIA

Programs in highest demand	Programs with highest enrolment	Programs with lowest enrolment rate
▪ Business	▪ Humanities	▪ Medicine
▪ Engineering	▪ Arts and Education	▪ Dentistry
▪ Computer Science	▪ Arts and Social Sciences	
	▪ Islamic Studies	
	▪ Business	

Source: Canadian High Commission, Malaysia; Malaysian Ministry of Education; Education Canada

5.57

FACTORS INFLUENCING MALAYSIAN STUDENTS COMING TO CANADA

- 1979-80: The United Kingdom increases tertiary education fees
- 1980-83: Malaysian government sponsors students to study anywhere except the United Kingdom; private students also urged not to go to the United Kingdom
- 1982: Number of Malaysian students in Canada peaks at over 8 000
- 1984-86: Decline in number of Malaysians coming to Canada; Colombo Plan support and scholarships end
- 1985-88: Recession in Malaysia; the United Kingdom, the United States and Australia offer scholarships; Malaysian government again sends sponsored students to the United Kingdom in exchange for favourable trade terms
- 1988-93: Australia begins marketing in Asia; British Council promotional programs, U.S. twinning programs; New Zealand opens offices in seven Asian capitals

Source: Education Canada, Malaysia

SINGAPORE

5.61

SINGAPORE EDUCATION MARKET

■ Population	- 3 million (1992) estimated - 3 million (2000) projected
■ Per capita GDP	- US$13 608 (1992) estimated; 6% growth projected (1993) - US$7 282 (1980)
■ Domestic education	- 27 colleges (1992), includes junior colleges and polytechnics 25 787 student population (1992) - 2 universities (1992), 15 154 student population (1992) 7 000 spaces available at both universities each year
■ Higher education demand	Even though there will be 3 universities by 1994, the demand for places at universities is still expected to far outweigh the supply.
■ Secondary school enrolment (percentage of secondary school age group)	1960s, 45%; 1970s, 52%; 1990s, 71%
■ Adult literacy	86%

Source: Canadian High Commission, Singapore; CIDA – Asia Branch; Far Eastern Economic Review, March 1993

5.62

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM, SINGAPORE

Programs in highest demand	Programs with highest enrolment	Programs with lowest acceptance rate
■ Medicine	■ Arts and Social Sciences	■ Architecture
■ Law		
■ Business Administration		
■ Engineering		
■ Computer Science		

Source: Canadian High Commission, Singapore

5.63

SINGAPOREAN STUDENTS' DEMAND FOR INTERNATIONAL EDUCATION

- Of all Singaporeans outside Singapore, 42 percent are students
- Destinations of Singaporean students studying overseas
  U.S. (31%), U.K. (22%), Canada (8%), Australia (29%), New Zealand (1%)
- An estimated 15 371 Singaporean students study outside of Singapore (1990)
- Singaporean students at university in Canada
  undergraduate: 1 071 (1990), 1 118 (1991)
  graduate: 92 (1990), 98 (1991)
  total: 1 163 (1990), 1 216 (1991)
- Singaporean students studying at college in Canada: 144 (1990), 145 (1991)
- Of 15 cabinet ministers in Singapore, 7 received their university education in Canada.
- Employers in Singapore are seeking graduates from the global community. International students are viewed as more well-rounded, independent and adaptable.
- Overseas education is seen to offer a better all-round education, one not available in Singapore's exam-oriented system.
- The small number of universities and high entrance requirements (including a bilingual policy) contribute to a continued demand for international education.
- The emigration of Singaporeans in the past 10 years has led to vast networks of family and friends in other countries.

Source: Canadian High Commission, Singapore; Statistics Canada

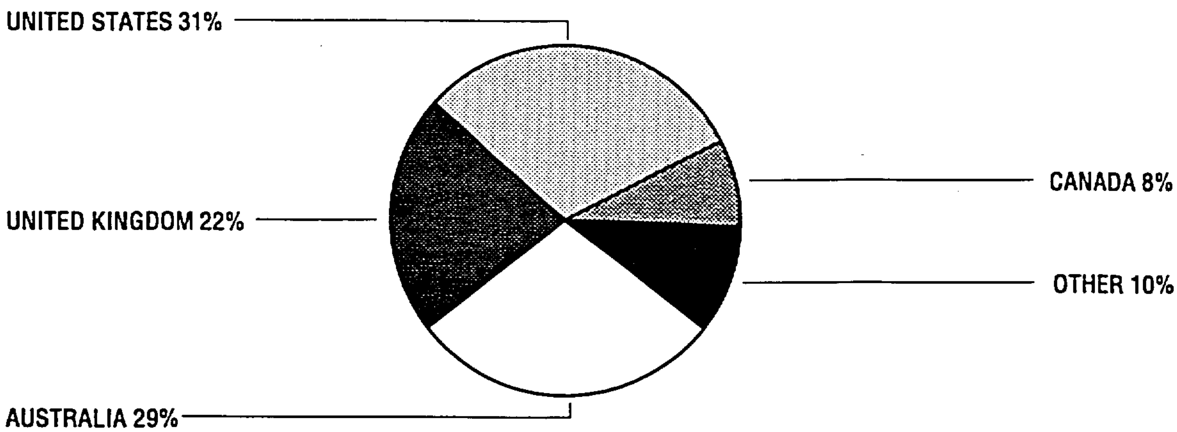
5.64

TOP INTERNATIONAL EDUCATION DESTINATIONS FOR SINGAPOREAN STUDENTS

1980	1985	1990	1991
1. U.K.	1. AUSTRALIA	1. U.S. (3 841)	1. U.S. (4 760)
2. AUSTRALIA	2. NEW ZEALAND	2. CANADA (2 200)	2. AUSTRALIA (4 392)
3. NEW ZEALAND	3. U.S.	3. AUSTRALIA (2 000)	3. U.K. (3 411)
4. U.S.	4. CANADA	4. U.K. (2 000)	4. CANADA (1 216)
5. CANADA	5. U.K.	5. NEW ZEALAND (141)	5. NEW ZEALAND (101)

5.65

SINGAPORE–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 15 000 students from Singapore studying internationally.

THAILAND

5.71

THAI EDUCATION MARKET

■ Population	- 57.8 million (1992); population growth rate 1.3% - 64 million (2000) projected
■ Per capita GDP	- US$1 605 (1991); 7.7% growth projected (1993)
■ Domestic education	- 305 colleges (1990) - 43 government universities (1992) - 25 private universities (1992) total spaces available: 15 395 (1987) total number of candidates: 87 770 (1987)

- About 18 percent of university applicants in Thailand are accepted.

■ Secondary school enrolment (percentage of secondary school age group)	1960s, 14%; 1970s, 26%; 1990s, 28%
■ Adult literacy	91%

Source: Thai-Canadian Association

5.72

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM, THAILAND

Programs in highest demand	Programs with highest enrolment	Lowest acceptance rate	In demand, not available domestically
■ Mass Communication	■ Arts and Sciences	■ Mass Communication	■ Computer Science
■ Medicine	■ Languages	■ Medicine	■ Graphic Design
■ Engineering	■ Business	■ Engineering	■ Environmental Technician
■ Architecture	■ Accounting	■ Architecture	■ Science
■ Law	■ Secretarial		■ Telecommunications
■ Accounting			■ Artificial Intelligence
■ Secretarial			■ Hotel and Tourism
■ Business Administration			■ Food Science
■ Fine Arts			■ Urban Planning

Source: Thai-Canadian Association

5.73

THAI STUDENTS' DEMAND FOR INTERNATIONAL EDUCATION

- An estimated 10 000 Thai students study overseas (1990).
- Thai students in Canada (1991)
  - college: 76
  - undergraduate: 25
  - graduate: 165
  - total: 342
- International education is perceived extremely positively.
- There is a preference for international education at the university level – a college education is not highly valued, vocational students can't afford international education.
- A rise in individual wealth has increased numbers of Thai students studying overseas.
- There is a high demand for English as a second language training.
- Thai students often do not have prerequisite high school math and science courses to pursue an international university education.
- Some government departments, universities and businesses offer promising executive-level workers opportunities to win scholarships to study abroad in certain fields.

Source: Thai-Canadian Association; Statistics Canada

5.74

TOP INTERNATIONAL EDUCATION DESTINATIONS FOR THAI UNIVERSITY STUDENTS

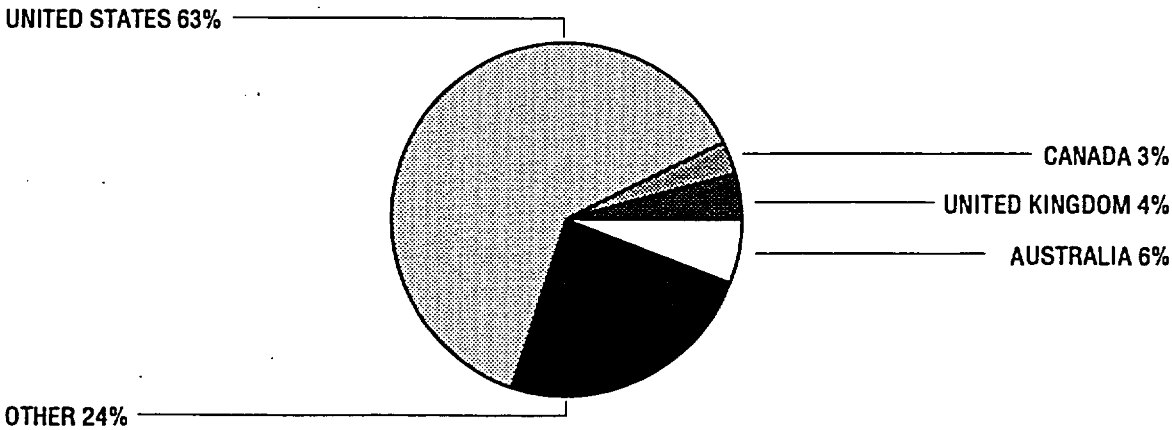
1990

- U.S. (6 353)
- PHILIPPINES (731)
- JAPAN (681)
- AUSTRALIA (576)
- U.K. (358)
- FRANCE (231)

Source: UNESCO Statistical Yearbook 1992

5.75

THAILAND–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 10 000 students from Thailand studying internationally.
Note: Statistics are based on university students only.

THE PHILIPPINES

5.81

FILIPINO EDUCATION MARKET

■	Population	- 64.2 million (1992); population growth rate 1.8% - 73 million (2000) projected
■	Per capita GDP	- US$963 (1992) estimated; 2% growth projected (1993) - US$253 (1980)
■	Domestic education	- 81 universities - 861 colleges Total tertiary student population: 1 656 815 (with the exception of the top 4 universities, there are more spaces available than students)
■	Secondary school enrolment (percentage of secondary school age group)	1960s, 41%; 1970s, 54%; 1990s, 66%
■	The student population is expected to increase by 45 percent from 1993 to 2000.	
■	Adult literacy	88%

Source: Canadian Embassy, the Philippines; CIDA - Asia Branch; Far Eastern Economic Review, March 1993

5.82

DOMESTIC DEMAND BY EDUCATIONAL PROGRAM, THE PHILIPPINES

Programs in highest demand	Programs of increasing demand	Programs with lowest acceptance rate
■ Business	■ Computer Science	■ Medicine
■ Teacher Education	■ Physical Therapy	■ Dentistry
■ Engineering		
■ Health Sciences		
■ Arts and Sciences		

Source: Canadian Embassy, the Philippines

5.83

FILIPINO DEMAND FOR INTERNATIONAL EDUCATION

- Fewer students are going abroad for undergraduate degrees. In 1980, 2 800 studied outside the Philippines and in 1992 only 750 studied outside the Philippines.
- A higher quality of domestic education, political stability, and the availability of scholarships have influenced Filipinos to study in the Philippines.
- Filipino high school graduates have no direct entry to universities in Canada. Even with a bachelor's degree granted in the Philippines, students are required to complete an additional two years of undergraduate studies in Canada.

Source: Canadian Embassy, the Philippines

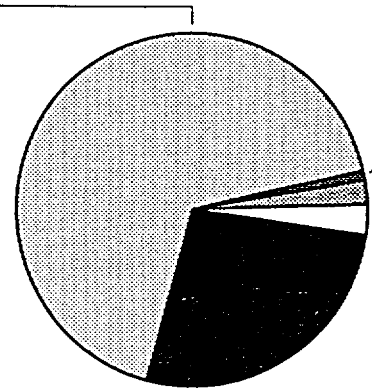
5.84

TOP INTERNATIONAL EDUCATION DESTINATIONS FOR FILIPINO STUDENTS

1980	1985	1990	1992
U.S.	U.S.	U.S.	U.S.
SWITZERLAND	SWITZERLAND	SWITZERLAND	AUSTRALIA
U.K.	U.K.	AUSTRALIA	SWITZERLAND
	WEST GERMANY	U.K.	U.K.
		CANADA	CANADA/SINGAPORE

5.85

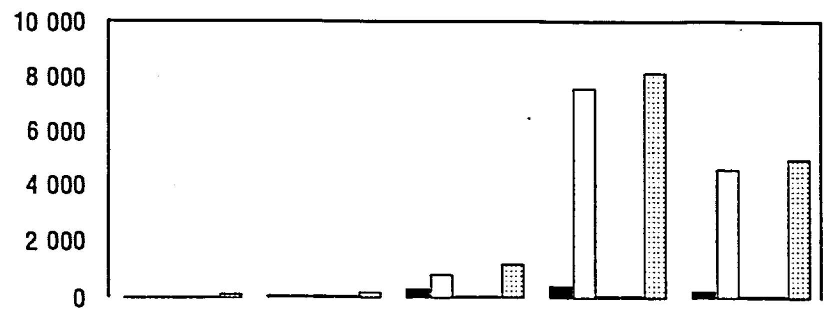
PHILIPPINES–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 6 000 students from the Philippines studying internationally.
Note: Statistics are based on university students only.

5.86

STUDENTS IN CANADA FROM PHILIPPINES, BY LEVEL AND BY YEAR



	1975	1980	1985	1990	1991
ELEMENTARY/SECONDARY	14	70	323	406	229
COLLEGE/TRADE	20	42	855	7 404	4 523
UNDERGRADUATE	23	52	43	69	58
GRADUATE	19	49	34	66	70
TOTAL	76	213	1255	7 945	4 880

Source: Statistics Canada

INDONESIA

5.91

INDONESIAN EDUCATION MARKET

■ Population	- 180 million (1992) - 213 million (2000) projected
■ Per capita GDP	- US$605; 6-7% growth projected (1993)
■ Domestic education	- 45 public universities and institutes - Over 750 private universities and colleges
■ Demand	- Severe shortage in capacity to train engineers
■ Secondary school enrolment (percentage of secondary school age group)	1960s, 12%; 1970s, 20%; 1990s, 46%
■ Adult literacy	72%

Source: Canadian Embassy, Jakarta; CIDA – Asia Branch

5.92

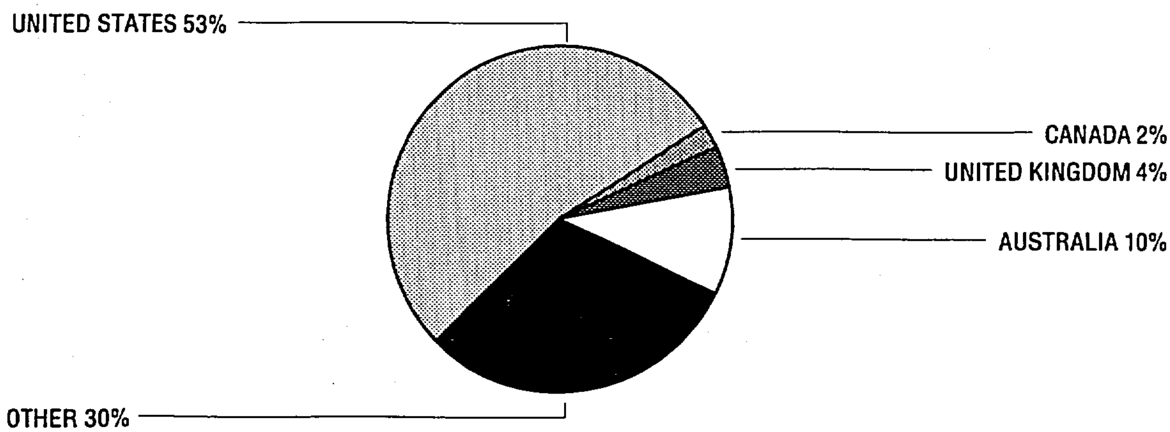
DOMESTIC DEMAND BY EDUCATIONAL PROGRAM, INDONESIA

Programs in highest demand

- Engineering
- Medicine
- Economics
- Pharmacy
- Agriculture
- Computer Science
- Law
- Natural Sciences

5.93

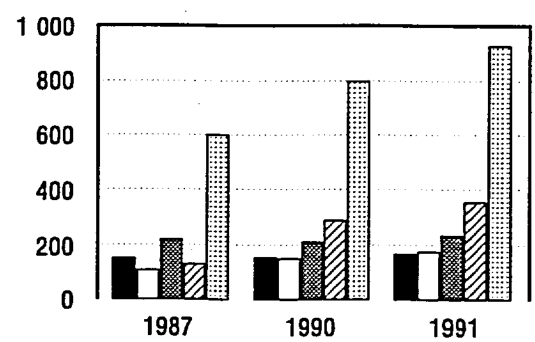
INDONESIA–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 16 500 students from Indonesia studying internationally.
Note: Statistics are based on university students only.

5.94

STUDENTS IN CANADA FROM INDONESIA, BY LEVEL AND BY YEAR



	1987	1990	1991
ELEMENTARY/SECONDARY	150	154	166
COLLEGE/TRADE	106	149	174
UNDERGRADUATE	220	211	234
GRADUATE	129	290	356
TOTAL	605	804	930

Source: Statistics Canada

CHINA

5.10-1

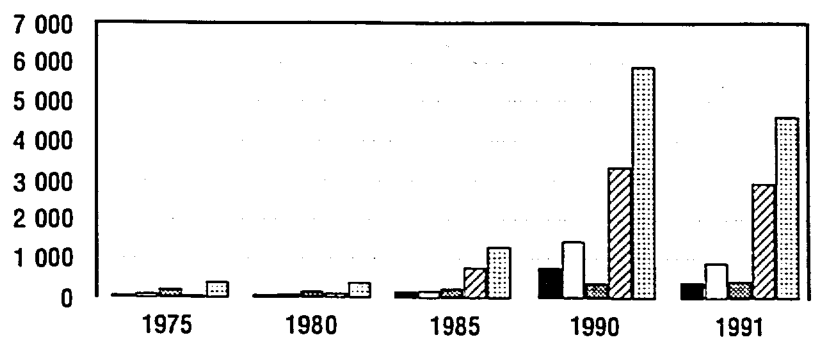
CHINA EDUCATION MARKET

▪ Population	- 1 158 million (1992) - 1 294 million (2000) projected
▪ Per capita GDP	- US$337 (1989); 12% growth projected
▪ Domestic education	- 1 075 institutions of higher education (colleges and undergraduate institutions) total student population 213 million (1991)
▪ Secondary school enrolment (percentage of secondary school age group)	1970s, 47%; 1990s, 43%
▪ Adult literacy	68%

Source: State Education Commission, the People's Republic of China; CIDA–Asia Branch

5.10-2

STUDENTS IN CANADA FROM CHINA, BY LEVEL AND BY YEAR

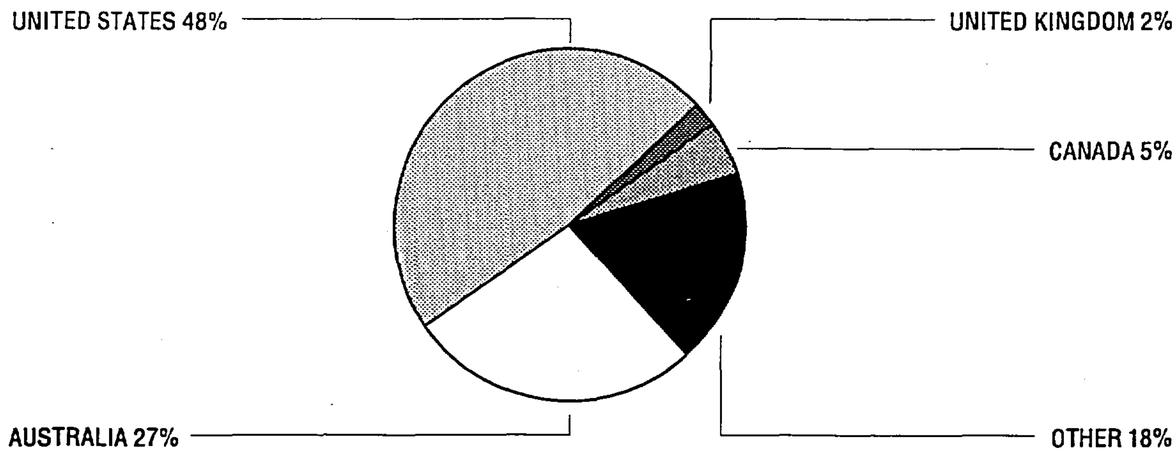


	1975	1980	1985	1990	1991
ELEMENTARY/SECONDARY ■	45	62	141	760	382
COLLEGE/TRADE □	85	66	157	1 436	867
UNDERGRADUATE ▩	199	139	225	383	418
GRADUATE ▨	41	91	758	3 342	2 834
TOTAL ▦	370	358	1 281	5 921	4 501

Source: Statistics Canada

5.10-3

CHINA–DESTINATIONS OF INTERNATIONAL STUDENTS, 1991



In 1991 there were approximately 85 500 students from China studying internationally.
Note: Statistics are based on university students only.