

**Economic Impact of International
Education in Canada
Final Report**

Presented to:

Foreign Affairs and International Trade Canada

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Executive Summary

Major Findings

In 2008, international students in Canada spent in excess of \$6.5 billion on tuition, accommodation and discretionary spending; created over 83,000 jobs; and generated more than \$291 million in government revenue.

Altogether there were 178,227 long-term (staying for at least six months) international students in Canada in 2008, generating more than \$5.5 billion to the Canadian economy. Nearly 40 percent of that revenue came from two countries – China and South Korea. As of December 2008 there were 42,154 Chinese and 27,440 South Korean citizens in Canada undertaking a formal education. Ontario and BC hosted nearly two thirds of the international students in Canada (65,833 and 50,221 respectively) while Quebec was a distant third with only 28,010. Some institutions, such as Thompson Rivers University in Kamloops, British Columbia, rely heavily on International Students. Approximately 12 percent of TRU's student population is international and with an average annual growth of 18 percent since the 2004/05 school year, they could exceed both UBC and SFU in terms of per capita enrolment.

The remaining expenditure of \$1.0 billion was generated by shorter term students for which we have less detailed data. Therefore, this is a minimum estimate.

Over all, the total amount that international students spend in Canada (\$6.5 billion) is greater than our export of coniferous lumber (\$5.1 billion), and even greater than our export of coal (\$6.07 billion) to all other countries.

When the value of educational services provided in Canada to international students is compared to the value of the more traditional goods that Canada exports, the impact for some countries is even more striking. The South Koreans, for example, spend the equivalent of 22.1% of the value of the goods they import from Canada on educational services. Similarly, we see that Saudi Arabia (14.3%), China (12.4%), India (9.3%), Taiwan (8.2%), France (8.1%) and Hong Kong (7.2%) all spend significantly for educational services when compared to the trade goods they import from Canada.

In this report, Roslyn Kunin and Associates, Inc. (RKA) has used primarily secondary sources to collect information on the quantitative impact of international students in various levels of study on the Canadian economy. The RKA team has also worked extensively with international education stakeholders and organizations to collect data on different types of expenditure items and their

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dollar amounts, and calculated total expenditure by level of study and by province/territory.

**Summary Table I Economic Impact of International Education Services in
Canada, 2008**

	Total Expenditure	GDP	Employment	Government Revenue
Long-Term Students				
Newfoundland and Labrador	\$38,145,000	\$27,884,000	440	\$1,417,000
Prince Edward Island	\$12,864,000	\$4,313,000	70	\$416,900
Nova Scotia	\$168,340,000	\$122,648,000	2,360	\$6,599,500
New Brunswick	\$88,915,000	\$68,175,000	1,190	\$3,234,800
Quebec	\$1,025,042,000	\$745,539,000	11,840	\$72,539,300
Ontario	\$2,162,252,000	\$1,598,644,000	24,420	\$102,674,000
Manitoba	\$115,807,000	\$82,817,000	1,500	\$5,646,200
Saskatchewan	\$99,695,000	\$70,864,000	1,260	\$4,590,700
Alberta	\$364,584,000	\$262,684,000	4,240	\$8,780,700
British Columbia	\$1,423,161,000	\$1,056,820,000	17,610	\$40,872,300
Territories*	\$1,214,000	\$370,000	10	\$11,400
Sub-Total Long-Term Students	\$5,500,019,000	\$4,040,758,000	64,940	\$246,782,800
Short-Term Languages Canada Students	\$745,648,000	\$509,125,000	13,210	\$36,322,400
Additional Tourism Benefits	\$285,240,000	\$160,730,000	5,331	\$8,331,700
*Yukon, Northwest Territories and Nunavut				
Grand Total	\$6,530,907,000	\$4,710,613,000	83,481	\$291,436,900

Source: RKA

The number of students by province is listed in Summary Table II below

Summary Table II Number of Long-Term International Students in Canada, by Province / Territory, by Level of Study, 2008

	Secondary or less	Trade	University	Other Post- Secondary	Other	Level of Study not Stated	All Levels
Newfoundland and Labrador	163	51	1,060	221	20	-	1,524
Prince Edward Island	86	-	379	33	-	-	521
Nova Scotia	937	130	4,421	247	64	-	5,802
New Brunswick	420	152	2,257	253	180	0	3,263
Quebec	1,636	884	21,743	3,006	733	-	28,010
Ontario	11,432	8,025	33,916	9,415	3,022	-	65,833
Manitoba	866	155	3,505	263	83	-	4,873
Saskatchewan	838	30	2,604	118	65	-	3,656
Alberta	3,818	1,872	6,877	1,526	335	-	14,433
British Columbia	14,133	7,624	18,642	7,644	2,170	-	50,221
Territories*	61	-	-	-	-	-	87
*Yukon, Northwest Territories and Nunavut							
Total	34,390	18,923	95,404	22,726	6,672	-	178,227

Source: Citizenship and Immigration Canada

The quantitative results are summarized below.

- The economic benefit of international students studying in Canada is substantial. Total expenditure of long-term international students in Canada amounted to about \$5.5 billion in 2008. This translates to almost \$4.1 billion in GDP contribution to the Canadian economy, and represents about 7% of the GDP contributed by the overall education services sector in the Canadian economy.
- International education services serving these long-term students contributed to 64,940 jobs in the labour market. This represents about 5.5% of the total number of jobs in the overall education services sector in Canada.
- Those foreign students in short-term language training programs in Canada also contributed an additional \$746 million per year in total spending to the Canadian economy. This is equivalent to about \$509 million in GDP, 13,210 jobs, and \$36 million in government revenue.

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- In addition to capturing economic impact resulted from spending on tuition and fees and basic living expenses, we estimate that \$285,240,000 per year can be attributed to additional tourism related activities, including international students and their family and friends.

In the report, we have also presented two case studies which exemplify how and why international education has brought substantial economic benefits to the local economy.

International students visit Canada from all over the world. The top destinations from which students visit Canada and the export value of their education is detailed in the tables below. It is important to note that almost 50% of students are from East Asian countries (primarily China, South Korea and Japan).

Summary Table III Foreign Students in Canada by Top Source Countries, and Total Value of International Education Services, 2008

<u>Source countries</u>	<u>2008 Total Expenditure</u>	
China, People's Republic of	42,154	\$1,300,856,778
Korea, Republic of	27,440	\$846,788,205
United States of America	11,317	\$349,238,415
France	8,553	\$263,942,402
India	7,314	\$225,707,322
Japan	6,627	\$204,506,758
Saudi Arabia	4,672	\$144,176,184
Taiwan	4,127	\$127,357,687
Hong Kong	4,126	\$127,326,827
Mexico	3,853	\$118,902,148
Top 10 source countries	120,183	\$3,708,802,726
Other countries	56,740	\$1,750,975,318
Countries not stated	1,304	\$40,240,956
Total	178,227	\$5,500,019,000

Source: Citizenship and Immigration Canada; RKA

We have also examined the value of education services versus the total exports to each of these same countries.

Summary Table IV Comparison of International Education Services with Total Exports in Goods from Canada to the Top Ten International Student Source Countries and to All Countries, 2008

	Educational Services	All Goods Exports	Educational Services Compared with Total Goods Export
China, Peoples' Republic of	\$1.301B	\$10.471B	12.4%
Korea, Republic of	\$846.8M	\$3.836BM	22.1%
United States	\$349.2M	\$375.481B	0.1%
France	\$263.9M	\$3.241B	8.1%
India	\$225.7M	\$2.417B	9.3%
Japan	\$204.5M	\$11.091B	1.8%
Saudi Arabia	\$144.2M	\$1.009B	14.3%
Taiwan	\$127.4M	\$1.563B	8.2%
Hong Kong	\$127.3M	\$1.771B	7.2%
Mexico	\$118.9M	\$5.843B	2.0%
Total for Canada	\$5.5B	\$483.630B	1.1%

Source: RKA; Canada Merchandise Exports (Customs Basis) – DFAIT 2009

Recommendations

This report shows that international students make a very significant contribution to the Canadian economy, job base and government revenues. Therefore, it is important to get more consistent, complete and accurate data on students and their expenditures in Canada. Such data is not readily available now. Therefore, we put forward the following recommendations:

- Consider the possibility of establishing a survey method like that undertaken in Australia where a sample of visitors leaving the country would be surveyed regarding their activities in Canada. This would need to be done at all major international airports and would need to be carried out in a number of languages.
- Work with stakeholders (including CIC, Statistics Canada, and universities, colleges, and other training institutions) to develop a consistent system of record-keeping to track international student expenditures while in Canada.

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- Work with Statistics Canada to develop a national survey of public and private educational institutions to determine international student enrolment, tuition rates, and other expenses for degree/diploma granting programs as well as adult and continuing education classes of under six months.
- Coordinate with provincial governments and national organizations to determine consistent survey questions for international students.
- Insure that international students are recognized and supported commensurate to their importance to Canada relative to other similar sized exports of goods and services.

1. Introduction

As Canada's economy becomes increasingly globalized, the benefits of international education to our economy are substantial and cannot be neglected. To remain competitive in the global economy, Canada needs to attract the best and the brightest to contribute to our talent pool in so many areas – scientific and research development, economic development opportunities, cultural diversification, just to name a few. International students studying in Canada also bring in substantial income to the local communities. International students can also become a valuable source of highly skilled labour to our economy at a time when the western world is facing potential labour shortages especially among top talent. In addition, Canada's educational expertise is a valuable export that can be measured in comparison to other goods and service exports.

Roslyn Kunin and Associates, Inc. (RKA) has been commissioned by Foreign Affairs and International Trade Canada (DFAIT) to undertake an in-depth and comprehensive study evaluating the economic impact of international education in Canada. Its purpose is to develop, implement, and analyze an economic model to determine the value of international education and student mobility brings to the Canadian economy.

Existing literature has clearly indicated that there is positive value associated with Canadian students going abroad and international students coming and studying in Canada. RKA has been commissioned to look at the latter and we will assess the financial value by way of looking into the trends in international students' enrolment patterns, the length of study, the type of educational institutions they attend, their choice of place to stay while they are in Canada, and their expenditure patterns.

Below, we list what we cover in our research. Our research has:

- Covered all provinces and territories in Canada where international student enrollment data is available;
- Collected and reviewed, where possible, data and information regarding enrollment in K-12, post-secondary (both colleges and universities, both public and private), as well as short term studies such as language training and other vocational training;
- Contacted stakeholders to obtain information regarding tuition and fees that international students pay for the types of programs in which they enroll, from jurisdictions across Canada;
- Located and analyzed information on international student expenditure patterns.

The data has been analyzed and estimates have been calculated. The value has also been measured as contribution to the Canadian economy in terms of GDP growth, employment, and government revenue.

The layout of the report is as follows:

- Study methodology
- Literature review
- International student data
- Expenditure data
- Economic impact estimation for 2008
- Examination of the economic contributions of “tourism activities”
- Case studies – Provincial and Non-urban
- Examination of Canada’s performance in the global market
- Conclusions and Recommendations

2. Methodology

RKA's methodology for the study on the economic impact of international education in Canada includes extensive secondary research involving literature review, collecting existing statistical data and information, as well as consulting with provincial and territorial education sector representatives, and representatives from organizations promoting and researching trends in international education in Canada and/or provinces.

We have reviewed existing data on university, college, language school and elementary/secondary school enrolment and tuition as well as information regarding living expenses and spending estimates for international students. The following provided relevant research data and information:

- *Statistics Canada*
- *Citizenship and Immigration Canada*
- *Advanced Education and Education branches for BC, Alberta, Manitoba, Ontario, Quebec, Newfoundland-Labrador and Nova Scotia*
- *BC Centre for International Education*
- *EduNova*
- *Languages Canada*
- *National Association of Career Colleges*
- *Association of Universities and Community Colleges*
- *Association des universités de la francophonie canadienne*

The References section of this report provides a more detailed listing of the materials used and the individuals interviewed in preparing this report.

The methodology undertaken is as follows:

1. Collect key education contacts from DFAIT
2. Through additional research and references from key contacts, attempt to collect as much data as possible on the following:
 - International student enrollment in various programs and institutions
 - Tuition data
 - Living and entertainment expense data

- Tourism data
- 3. Compile data and analyze data above
- 4. Complete interviews/research regarding case studies

Challenges:

As with most studies of this nature, one of the key challenges was contacting the right people. Not only are people exceptionally busy, but because their work involves international education they are often traveling out of the country. This difficulty was compounded by one other readily evident challenge – much of the data we required was just not collected in any meaningful way.

One of our first thoughts was to go to national organizations representing large groups of private and public schools and institutions. What became evident very quickly is that these organizations (except for Languages Canada) do not collect data on international students from their member institutions.

Another challenge faced was that non-study permit visitors (those in the country less than six months) are not formally tracked in the system. Citizenship and Immigration Canada has indicated that data on visitors entering Canada for short-term study purposes is not currently captured and has indicated that it is unlikely that they would be able to capture this data in the near future.¹

Languages Canada recently completed a survey of its members and we were given access to the data. A significant proportion of the students attending the member institutes are short-term students so this kept us from having a complete lack of data on this topic.

While some organizations (BC Progress Board, Conference Board of Canada and others) completed reports on the economic impact of international education, two things became apparent when following up with them on these studies. First, they have not kept up with the research, so much of the work is out of date, and second, they ran into many of the same problems that we did. Fortunately, we have been able to fill a few of the gaps and offer here a more viable tool.

¹ Citizenship and Immigration provided the following clarification regarding the changes to allow foreign nationals to enter as visitors to undertake short-term studies. These changes “were introduced to respond to requests from stakeholders to expedite the entry of foreign nationals destined to short-term studies. However, with the introduction of the above changes, separating this group from other visitors to Canada is no longer possible. Stakeholders were advised of these data limitations at the time of the introduction of the regulatory/policy changes.”

3. Literature Review

In this Section, we provide an overview of literature on topics and issues related to international education in Canada. The purpose of this is to provide an overview of background information and what previous research has informed us and what data gaps exist.

Defining International Education:

"International education may involve formal or informal academic, cultural, employment, travel or volunteer experience abroad with return to the native country; hosting international education programs and students; internationalizing domestic courses, programs and curriculum; and exchange programs for students, researchers, citizens and employees provided by government, non-profit, educational, or employer provided programs." (1999, Conference Board)

International Education:

The Council for Higher Education Accreditation's *Sharing Quality Education Across Borders: A Checklist for Good Practice*, highlighted a number of important issues, including:

- "the need to safeguard the broader cultural, social, and economic contributions of higher education and research; protect the interests of students and facilitate their mobility; and strengthen the capacity of developing countries to improve accessibility to high-quality higher education"
- key elements - contribution to the public good (social, economic, and cultural), capacity building (cooperation and collaboration), relevance (current and recognizable), accessibility (financial), quality (institutional, administrative, faculty), accountability (authorization and organizational memberships), and transparency (public information, admission policies, and appeals procedures), and commitment to high-quality standards (codes of good practice)

Economic Impacts

The Conference Board of Canada's study, *Economic Implications of International Education*, emphasized some key aspects to consider (although it is important to note that most of the statistics are from the mid 1990s):

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- improved flow of knowledge and information, understanding of global markets, and the understanding of international capacities that can benefit a global business environment.
- in 1999 Canada was not a major player in the foreign education landscape and had not reaped the economic benefits that many other countries had.
- the report provides performance indicators - an index that compares the "relationship between international education activity and economic performance", reports on key countries and their policies, programs and indicators, international trends, and options for Canada in the future.
- the report found that - Canada is not keeping up with other key countries in terms of international education; international education and economic performance are "positively correlated"; international education has a positive impact on GDP, innovation, and foreign direct investment; European countries studied have developed coordinated national strategies for international education; Canada and US are dominated by non-profit, educational and employer initiatives;
- regarding student inflows, the US and the UK have the highest absolute levels and Australia has the highest level per 1000 people
- Relationships: the following are identified as having positive relationships
 - international education and GDP; international education and innovation; international education and international trade, international education and foreign direct investment
- According to the report, Canada ranked 6th (out of the top 9 countries) in student inflows throughout the period 1991 to 1995

Roslyn Kunin and Associates' report *Economic Value of International Education in BC* used:

- a total impact approach to evaluate quantifiable benefits that international students bring to BC.
- direct impacts to measure the increase in industrial output and the increase in an industry's (educational services) labour force from the inflow of international students to the province on a yearly basis. Increase in government revenue also measured.

- indirect impacts to measure the change in industrial output and employment demand in sectors that supply goods and services to the public post-secondary education sector in the province.
- induced impact to measure the changes in output and employment demand over all sectors of the economy as a result of an income increase in households impacted both directly and indirectly.
- other equally important though non quantifiable benefits including such factors as helping BC students prepare for a career in the global economy and generating long term international business and tourism opportunities for BC through networking and familiarity with the province.

A number of sources identified concerns regarding the double counting of students and the over-estimation of spending. The problem arises, generally, because data is collected, when available, from a variety of sources. And even then, there is a distinct possibility that the data may have been collected and used by other institutions. This is most often the case when data is collected from institutions that service both short and long term students. Organizations like Languages Canada have made considerable efforts to deal with the issue, but you are still ultimately at the mercy of each individual institution.

International Mobility Comparisons

- In 2002 international education represented \$30 billion or 3% of OECD's total trade services²
- US and UK hosted 42% of international students in 2002
- international students primarily come from China, Hong Kong, India, Indonesia, Japan, Malaysia, Singapore, South Korea and Thailand
- Impacts to examine related to inflows: exchange rates,

In the Canadian Bureau for International Education's *Northern Lights Report* (2007) brings up a number of items to consider for the research:

- there was considerable discussion of international graduate students
- International students represent 30000 graduates from post-secondary institutions annually
- A lot of focus has been drawn to the excellent work in Australia with the creation of the Australia Education International. Prior to commencing our research RKA did further research into the AEI.

² OECD

Education Policy's *Student Mobility and Credit Transfer* document was not closely related to what we need, but did bring up some important issues and potential information sources impacting financial aid - foundations, student aid (inter-state aid), and government's support. It also addressed the issue that Canada provides very little in the way of international student aid.

Even though the data is somewhat outdated, it is important for historical purposes to examine the Institute for the Study of International Migration's *Foreign Students coming to America (2007)* document as it raises a number of issues that not only deal with its key focus (US international student mobility in the post 9/11 world), but also the decision-making process for international students. Some key findings:

- international students jumped from 1 million in 1994 to 2.7 million in the US 2004³
- based on a 2007 study of international student receptiveness, Canada ranked 2nd to the UK in receptiveness to international students. Other countries surveyed: Switzerland, France, Germany, Austria, US, Sweden, Australia.
- Canada's market share has decreased from 6% to 5% between 2000 and 2004⁴
- Graduate student enrolments - less than 5% of global total.
- issues to consider - size of future student base (foreign training in-country, growth and credibility of domestic training, competition from other nations (esp. Australia and the UK).
- India has tripled the number of post secondary institutions (from 6000 to 18000) between 1990 and 2006. Asia-Pacific in-country training has increased from 9-19% and among middle income countries from 16-27%
- growth in college-aged populations should translate into greater numbers of potential international students
- the report goes on to project India's college age population to grow from 125 to 139 million between 2005 and 2015
- factors when deciding where to study include the cost of tuition, application process, fear of visa rejection, foreign policy of source vs. destination country, other

3 OECD

4 OECD

An article by Citizenship and Immigration Canada entitled *Competitor Research* determined that:

- Canada has fallen as a destination from 5th to 14th ⁵
- while Canada's exporting of education grew, the market share of international education declined.
- Demand for international education is to grow from 1.9 million to 7.2 million students by 2025⁶
- Australia is THE current competitor to Canada in the area of International Education

Growth in Foreign Student Expenditures in Canada

A recent Foreign Affairs and International Trade Canada table provides the baseline for our current work.

- 1998 to 2005 full time foreign students grew from 78,256 to 152,762⁷
- expenditures per student (including tuition) is estimated at \$25,000
- between 1998 and 2005 the economic impact has grown from \$1.7 billion to \$3.82 billion
- 1998-2005 Short Term students have been estimated as increasing from 113,000 to 235,000
- non-educational expenditures (accommodation and transportation) is estimated at \$6 to \$7,000 per annum
- The total growth from 1998-2005 is estimated at \$2.38B to \$5.47B

Data Collection Best Practices:

In conducting this literature review, it became apparent that while many countries cater to a significant number of international students, few actively track the activities and spending patterns on a national basis. A recent study in Australia could have a significant impact on how national governments approach the issue of tracking the impact of international students. *The Australian Education Sector and the Economic Contribution of International Students (ACPET, 2009)* has determined that international students directly contribute over \$14 billion to the

⁵ The Conference Board of Canada. *Opportunity Begins at Home*. April 2006

⁶ OECD

⁷ The source for the data included in this table is not cited.

Australian economy (and about \$12.5 billion in indirect contributions) representing over 126,000 full time employees.

In order to collect this data, the Australian Council for Private Education and Training and its consultants used the Tourism Research Australia's International Visitor Survey to determine the number of visitors who identified education as their purpose of travel and examined their spending patterns⁸. The surveying of visitors (and the subsequent spin-off studies) has given the Australian education sector a significant advantage and could be jumping off point for other countries committed to a comprehensive evaluation of the economic impact of international education.

The Institute of International Education has also done extensive work regarding the economic impact of students. In fact, they have given what seems to be a more tempered, and realistic, assessment of international students' economic impact as they have subtracted scholarships and financial assistance provided to international students from the total economic impact amount. However, it appears that the dollar figure that they arrive at is still not entirely comprehensive as a) it is only based on tuition and living expenses – with not mention of tourism or entertainment expenses and b) it would appear that language schools and other short term training institutes are not included in this study. In fact, the IIE partner site, the NAFSA: Association of International Educators, acknowledges that their impact figure is a conservative one.

In Canada, some provinces have (or are attempting to) compile data on international students. The Manitoba International Education Branch produces annual reports (the 06/07 report can be found at http://www.gov.mb.ca/ie/pdf/2006_2007_student_report.pdf). The report includes post-secondary, elementary/secondary, and language school data.

Key Issues for this Research

Based on the literature research to date, the team has found that there are no up-to-date, on-going, or consistent measures of evaluating the economic impact of international education in Canada. There are some provincial studies, for example, in BC, Manitoba and in Nova Scotia. On a national level the previous comprehensive analysis was the Conference Board of Canada's report done in 1999. In addition, the level of detail presented in each of these studies is usually quite different, due to the lack of basic and comparable data available at the provincial level.

⁸ The TRA samples 40,000 foreign visitors as they leave Australia each year. Survey participants are interviewed in airports (in one of four languages – English, Mandarin, Korean and Japanese) and asked 96 questions that cover purposes of trip, expenditures, travel, accommodation, etc. The survey results are posted each quarter.

4. Number of International Students in Canada

In this Section, we will describe data we have collected on the number of international students in Canada, as well as growth trends in recent years.

4.1. By Level of Education

4.1.1. Long Term Students

One of the main purposes of this study is to understand the number of international students in each province and territory and in different levels of study – public or private, in the K-12 system, college level, undergraduate and graduate students in the university system. Also, we need to determine the number of international students studying in professional and language training programs.

As mentioned in the Methodology section, even with our extensive research and contact with provincial and territorial education and training authorities and national stakeholders, we have not found data that was consistently defined or reported data on all students. Statistics Canada, in its Post-Secondary Information System, collects data on international student enrollment at the college and university levels (including breakdown of undergraduate and graduate levels) by field of study or by program level. However, the colleges and universities that are covered in the Statistics Canada's survey are essentially all in the public system, and as such we did not use enrollment numbers from this source as we were not able to gather information on those international students in the private post-secondary system. Also, university level data is available for up to 2006, while college data is available for up to 2005 only.

On the number of international students in the K-12 system, we have also not been able to obtain data from each of the provinces and territories.

One way of getting information on the number of international students in the country is from data published by Citizenship and Immigration Canada (CIC). As international students need to obtain a study permit before arriving in Canada to pursue education and training for a period longer than six months, CIC's data allows us to know how many holders of study permits are in each of the provinces and territories at a given time. For all these reasons, we have relied upon CIC data for analytical purposes.

CIC defines foreign students as "Temporary residents who entered Canada mainly to study and have been issued a study permit (with or without other types

of permits). A study permit is an official document issued by an officer that allows someone who is not a Canadian citizen or a permanent resident to study in Canada. In general, a study permit is not needed for any program of study that is six months or less. For statistical purposes, a temporary resident is designated as a foreign student on the basis of our determination of his or her “yearly status” – the main reason for which the person has been authorized to enter and stay temporarily in Canada during the year of observation. Foreign students exclude temporary residents who have been issued a study permit but who entered Canada mainly for reasons other than study.”

Five levels of study are shown for foreign students.

- Secondary or less: primary or secondary educational institutions in Canada
- Trade: vocational trade at non-university educational institutions in Canada (such as technical and vocational institutions, CEGEPs and colleges)
- University: undergraduate, postgraduate (master's and doctoral) and other studies at universities in Canada
- Other post-secondary: post-secondary level of study, not at the university or trade level, including language institutions, private institutions and university qualifying programs
- Other: foreign students not classified in any of the above levels of study

One important source of international students that is not covered in the CIC data is the number of such students who study in Canada for periods shorter than six months, as they do not require a study permit to enter the country. We will discuss about how we approach this later in the section.

Table 1 shows the total number of foreign students in Canada (as of December 1st of each year) in each of the five levels of study from 1998 to 2008.⁹

Table 1 Number of Foreign Students in Canada by Level of Study, 1998 to 2008

Level of study	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Secondary or less	23,939	24,522	27,997	31,669	32,590	31,614	30,763	30,517	32,546	34,480	34,390
Trade	10,652	12,763	16,504	20,127	22,857	24,717	25,179	24,079	22,581	21,553	18,923
University	39,547	45,712	53,168	63,613	72,970	81,117	88,647	91,727	92,865	94,621	95,404
Other post-secondary	5,695	7,399	9,092	12,785	14,485	15,801	13,910	14,506	15,823	19,375	22,726
Other	5,876	6,859	7,218	8,452	7,588	6,435	6,324	6,325	6,340	6,060	6,672
Level of study not stated	73	73	81	53	52	35	26	26	29	20	-
Total	85,803	97,341	114,093	136,716	150,552	159,727	164,855	167,188	170,194	176,116	178,227

Source: Citizenship and Immigration Canada

⁹ For more information see <http://www.cic.gc.ca/english/resources/statistics/menu-fact.asp>

Over this period, the number of international students in Canada has increased at an average growth rate of 8% per year. Students classified under the “Other Post Secondary” category have grown the fastest, at a rate of 15% per year, followed by those students classified in the “University” category, with an annual growth rate of 9%. Students who pursue study in the K-12 system have grown at a rate of 4% per year during this period. Those in the “other” level of study have grown the least, with an annual rate of 1%.

It should also be noted that between 1998 and 2003, enrolment of international students at the university level experienced double-digit annual growth rates. However, in recent years since 2005, it has not grown as fast as the average for all students.

Enrolment of international students in vocational trade colleges also enjoyed strong double-digit annual growth from 1998 up to 2003. However, enrolment of students at this level of study has been declining steadily since 2004 and continued into 2008.

Table 2 indicates the distribution of foreign students in Canada in different levels of study. The information in this Table has been derived based on the stock of foreign students as of December 1st of each year.

Table 2 Distribution of Foreign Students in Canada by Level of Study, 1998 to 2008

Distribution	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008*
Secondary or less	27.9%	25.2%	24.5%	23.2%	21.6%	19.8%	18.7%	18.3%	19.1%	19.6%	19.6%
Trade	12.4%	13.1%	14.5%	14.7%	15.2%	15.5%	15.3%	14.4%	13.3%	12.2%	12.2%
University	46.1%	47.0%	46.6%	46.5%	48.5%	50.8%	53.8%	54.9%	54.6%	53.7%	53.7%
Other post-secondary	6.6%	7.6%	8.0%	9.4%	9.6%	9.9%	8.4%	8.7%	9.3%	11.0%	11.0%
Other	6.8%	7.0%	6.3%	6.2%	5.0%	4.0%	3.8%	3.8%	3.7%	3.4%	3.4%
Level of study not stated	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

* Distributions estimated in 2008

Source: Citizenship and Immigration Canada

Data in Table 2 also indicate that Canada’s universities are most attractive to foreign students when we compare students in different levels of study. Together with other colleges, students in the post secondary system account for more than three quarters (76.9%) of all international students in Canada who pursue study for more than six months.

4.1.2. Languages Canada Short Term Students

For international students who generally study for shorter than six months in Canada, we have relied upon information provided to us by Languages Canada. In 2007, Languages Canada surveyed their membership and of the 115 institutions that replied they indicated enrollment of 103,293 students (representing 1,063,137 study weeks). Of this number at least 83,581 students (almost 81%) were for short term programs of under 6 months (not all programs were able to report the breakdown of their study weeks by length of study).

These numbers are for a combination of private post-secondary and public post-secondary non-credit language programs.

Languages Canada also made an estimate of the number of short-term language students from programs that did not report to Languages Canada when surveyed. This was 18,362. As such, total number of these short term students was 101,943.

Therefore, using information provided by Languages Canada, it is estimated that a total of 1,054,664 study weeks were spent in Canada by foreign students in short term language training programs.

We note that Languages Canada does not have all language training institutions in Canada in its membership. We further note that since there is no reliable data indicating the number of short-term international students enrolling in vocational training or other types of training, we have not been able to estimate the number of short-term international students other than those covered by Languages Canada.

4.2. By Province / Territory

CIC data also provides breakdown of the number of international students by province / territory.

Table 3 shows the number of foreign students in each of the provinces and territories in Canada between 2004 and 2008 (as measured by the stock of foreign students on December 1st each year). Of all the provinces and territories, international students to Newfoundland and Labrador and Prince Edward Island have shown the strongest growth in enrollment in recent years, at a rate of 13.6% and 14% respectively, but starting from a small base number. Alberta is the third in line, with an annual growth rate of 4.7%.

Table 3 Number of Foreign Students in Canada by Province and Territory, 2004 to 2008

Destination	2004	2005	2006	2007	2008
Newfoundland and Labrador	915	1,049	1,203	1,382	1,524
Prince Edward Island	309	345	405	476	521
Nova Scotia	5,464	5,461	5,475	5,444	5,802
New Brunswick	3,193	3,242	3,181	3,228	3,263
Quebec	25,472	25,206	25,914	27,095	28,010
Ontario	62,266	62,834	63,815	65,517	65,833
Manitoba	4,762	4,972	5,147	5,256	4,873
Saskatchewan	3,630	3,734	3,493	3,536	3,656
Alberta	12,023	12,431	12,965	13,846	14,433
British Columbia	46,707	47,777	48,463	50,198	50,221
Territories*	97	111	85	93	87
Province or Territory not stated	0	0	0	7	5
Total	164,838	167,162	170,146	176,077	178,227

*Yukon, Northwest Territories and Nunavut

Source: Citizenship and Immigration Canada

Because of its geographic size and the number of educational institutions, Ontario attracts the largest number of international students amongst all provinces and territories. However, its market share has been declining slowly over recent years as other provinces increased their efforts in attracting international students. Although British Columbia only accounts for about 13% of the national population, it accounts for about 28% of the international students in the country. As in Ontario, the number of BC's international students has grown more slowly than the national average in recent years.

Quebec, being the second most populous province in the country, accounts for almost 16% of the total number of international students in the country. It has been gradually increasing its market share in recent years. All such information is presented in Table 4. Information in this table has been derived based on the stock number on December 1st each year.

Table 4 Distribution of Foreign Students in Canada by Province and Territory, 2004 to 2008

Destination	2004	2005	2006	2007	2008
Newfoundland and Labrador	0.6%	0.6%	0.7%	0.8%	0.9%
Prince Edward Island	0.2%	0.2%	0.2%	0.3%	0.3%
Nova Scotia	3.3%	3.3%	3.2%	3.1%	3.3%
New Brunswick	1.9%	1.9%	1.9%	1.8%	1.8%
Quebec	15.5%	15.1%	15.2%	15.4%	15.7%
Ontario	37.8%	37.6%	37.5%	37.2%	36.9%
Manitoba	2.9%	3.0%	3.0%	3.0%	2.7%
Saskatchewan	2.2%	2.2%	2.1%	2.0%	2.1%
Alberta	7.3%	7.4%	7.6%	7.9%	8.1%
British Columbia	28.3%	28.6%	28.5%	28.5%	28.2%
Territories*	0.1%	0.1%	0.0%	0.1%	0.0%
Province or Territory not stated	0.0%	0.0%	0.0%	0.0%	0.0%
*Yukon, Northwest Territories and Nunavut					
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Citizenship and Immigration Canada

4.3. By Province / Territory and by Level of Education

We have also obtained information, from the Citizenship and Immigration Canada, on foreign student enrollment by province and by level of study. For the year 2008, the information is shown in Table 5.

Table 5 Number of Foreign Students in Canada by Level of Study, by Province and Territory, 2008

Destination	Secondary or less	Trade	University	Other Post-Secondary	Other	Level of Study not Stated
Newfoundland and Labrador	163	51	1,060	221	20	-
Prince Edward Island	86	-	379	33	-	-
Nova Scotia	937	130	4,421	247	64	-
New Brunswick	420	152	2,257	253	180	0
Quebec	1,636	884	21,743	3,006	733	-
Ontario	11,432	8,025	33,916	9,415	3,022	-
Manitoba	866	155	3,505	263	83	-
Saskatchewan	838	30	2,604	118	65	-
Alberta	3,818	1,872	6,877	1,526	335	-
British Columbia	14,133	7,624	18,642	7,644	2,170	-
Territories*	61	-	-	-	-	-
Province or Territory not stated	-	-	-	-	-	-
Total	34,390	18,923	95,404	22,726	6,672	-

*Yukon, Northwest Territories and Nunavut

Source: Citizenship and Immigration Canada.

Numbers in this table represent our best estimates of international student enrollment in different levels of study (longer than six months of duration) in each of the provinces and territories and will be the basis for our calculation in Section 6.

Table 6 shows the distribution of foreign students (as measured by the December 1st stock) by level of study in provinces and territories. In the Maritime Provinces as well as the provinces of Quebec, Manitoba and Saskatchewan, university students account for at least 70% of all foreign students studying in each of these provinces. In Ontario, Alberta, and BC, however, the shares of university students are lower than the national average. In the territories, 70% of their foreign students are in the K-12 system. It should also be noted that there is no university located in the territories.

Table 6 Distribution of Foreign Students in Canada by Level of Study, by Province and Territory, 2008

Destination	Secondary or less	Trade	University	Other Post-Secondary	Other	Level of Study not Stated
Newfoundland and Labrador	10.7%	3.3%	69.6%	14.5%	1.3%	-
Prince Edward Island	16.5%	-	72.7%	6.3%	-	-
Nova Scotia	16.1%	2.2%	76.2%	4.3%	1.1%	-
New Brunswick	12.9%	4.7%	69.2%	7.8%	5.5%	0.0%
Quebec	5.8%	3.2%	77.6%	10.7%	2.6%	-
Ontario	17.4%	12.2%	51.5%	14.3%	4.6%	-
Manitoba	17.8%	3.2%	71.9%	5.4%	1.7%	-
Saskatchewan	22.9%	0.8%	71.2%	3.2%	1.8%	-
Alberta	26.5%	13.0%	47.6%	10.6%	2.3%	-
British Columbia	28.1%	15.2%	37.1%	15.2%	4.3%	-
Territories*	69.8%	-	-	-	-	-
Province or Territory not stated	-	-	-	-	-	-
*Yukon, Northwest Territories and Nunavut						
Average	19.3%	10.6%	53.5%	12.8%	3.7%	-

Source: Citizenship and Immigration Canada.

5. Student Expenditure

In this section, we detail the sources of information and data we relied on and the techniques we applied to derive estimates of basic educational expenses and living costs while international students stay in Canada.

5.1. Tuition and Other Fees

5.1.1. Long Term Students

We have relied upon a variety of data sources to arrive at average tuition and other fees for different levels of study.

The average tuition fees and other fees paid by international students in different levels of study in each province and the territories are shown in Table 7.

Table 7 Estimated Tuition Fees and Education Related Expenses per Foreign Student in Canada by Level of Study, by Province and territory, 2008

Destination	Secondary or less**	Trade	University			Other Post- Secondary	Other
			Medium	Additional Fees	Books		
Newfoundland and Labrador	\$9,000	\$13,620	\$13,478	\$490	\$1,000	\$13,620	\$13,620
Prince Edward Island	\$9,000	\$11,909	\$11,260	\$775	\$1,000	\$11,909	\$11,909
Nova Scotia	\$9,000	\$15,122	\$14,787	\$813	\$1,000	\$15,122	\$15,122
New Brunswick	\$9,000	\$14,045	\$14,081	\$372	\$1,000	\$14,045	\$14,045
Quebec	\$8,500	\$16,912	\$16,896	\$705	\$1,000	\$16,912	\$16,912
Ontario	\$11,000	\$18,878	\$19,020	\$761	\$1,000	\$18,878	\$18,878
Manitoba	\$13,000	\$10,607	\$10,034	\$577	\$1,000	\$10,607	\$10,607
Saskatchewan	\$11,000	\$14,263	\$13,921	\$735	\$1,000	\$14,263	\$14,263
Alberta	\$11,000	\$14,705	\$14,587	\$577	\$1,000	\$14,705	\$14,705
British Columbia	\$10,500	\$16,600	\$16,809	\$473	\$1,000	\$16,600	\$16,600
Territories*	\$10,500	\$11,950			\$1,000	\$11,950	\$11,950
*Yukon, Northwest Territories and Nunavut							
Average	\$10,136	\$14,419	\$14,487	\$628	\$1,000	\$14,419	\$14,419

Source: RKA based on Statistics Canada data and other sources.

For tuition and other fees at the K-12 level, we have relied upon information published by provincial government reports in each of the provinces and territories.

Tuition fees for full-time undergraduate international students in 2008/09 increased 3.9% on average to \$14,487. Ontario (+5.1%) and New Brunswick (+4.2%) had the largest increases.¹⁰

Full-time international students in graduate programs paid on average 2.9% more in 2008/2009 compared to a year earlier, with students in Quebec (+3.9%) and Ontario and Saskatchewan (+3.2% each) facing the largest increases.¹¹

Detailed tuition fees for full-time university level international students for each of the provinces are available from Statistics Canada's annual Tuition and Living Accommodation Costs (TLAC) survey. Note that no data is available from the TLAC for the Territories.

We have not calculated an average of full time undergraduate and graduate tuition fees as we do not have a breakdown of the number of international students in each category. We have applied the average of undergraduate student tuition fees for calculation purposes. This will be a minimal estimate since fees for graduate students are higher than for undergraduates. In addition, we have included "Additional Fees" which represent compulsory fees universities impose on both domestic and international students, such as facility fees, society fees, health and dental (for international students only) fees, student pass fees in some cases, and others. We have also made an allowance of \$1,000 per academic year for books.

We note that tuition fees for undergraduate students are for an academic year of eight months, although in some cases, students do take courses in the summer program. We have assumed that all undergraduate international students are paying for the equivalent of one academic year's tuition in a given year.

In estimating student expenditure in tuition and other fees directly related to educational purposes for students in the "Trade" and "Other Post-Secondary" levels, we have derived the values in the following manner:

- For tuition fees, we have applied a factor of 90% to the average university tuition fees in each province. Based on the data available from the TLAC, tuition fees in colleges providing university level training average about 90% of all training institutions surveyed.¹²

¹⁰ See <http://www.statcan.gc.ca/daily-quotidien/081009/dq081009a-eng.htm>

¹¹ Same as above.

¹² We have also been provided by the BC Ministry of Advanced Education detailed tuition data for public college and university international students. Similarly, the average full-year tuition fees in colleges and university colleges are about 90% of the average of all public universities and colleges.

- We have also assumed that international students in “Trade” and “Other Post-Secondary” levels of study pay on average the same amount of “Additional Fees” as university level international students.¹³
- The same allowance for annual expenditure on books has also been applied.
- For college international students in the Territories, we have applied a value equal to the sum of the average university tuition fees (adjusted by a factor of 0.9), average “additional fees”, and the average allowance of \$1,000 for books.

For international students in the “Other” category, since we don’t have any detailed information on the nature of their study, we have assumed that they pay the same level of tuition fees and other education related expenses as those in the “Trade” level of study.

5.1.2. Languages Canada Short Term Students

Information from Languages Canada indicates that short term language students pay an average \$317 per study week for tuition fees.

5.2. Living Expenses

5.2.1. Long Term Students

In this sub-section, we develop a model of estimating cost of living for international students while they study in Canada.

We have also relied upon a variety of data sources to arrive at average living expenses for different levels of study. Information related to home-stay, average room and meals and other basic living expenses for international students in different levels of study is shown in Table 8.

For calculating living expenses at the K-12 level, we have relied upon information published by provincial government reports in each of the provinces on average home-stay costs for a 10-month period. No data is available for home-stay costs in the territories and we have assumed that students pay at least the same amount as those in BC.¹⁴

¹³ The TLAC data does cover colleges and institutes providing university level of training.

¹⁴ By using a 10-month home stay value we have assumed that international students in secondary schools or lower levels in the K-12 system spend on average 10 months each year and may return to home countries for vacation.

At the university level, we have relied upon Statistics Canada’s annual Tuition and Living Accommodation Costs (TLAC) survey data to calculate the average costs of on-campus room and meal expenses for an eight months period. Values in the column “University – Room and Meal – Medium” have been scaled up to full year values.

We note that these are fairly conservative estimates as they apply to single students living on campus. Students with a family generally pay more than the amount shown here in Table 8.

Table 8 Estimated Cost of Living per Foreign Student in Canada by Level of Study, by Province and territory, 2008

Destination	Secondary or less	Trade	University		Other Post- Secondary	Other
			Room & Meal Medium	Transport		
Newfoundland and Labrador	\$6,500	\$8,867	\$8,268	\$599	\$8,867	\$8,867
Prince Edward Island	\$6,500	\$12,022	\$11,600	\$423	\$12,022	\$12,022
Nova Scotia	\$6,000	\$12,285	\$11,744	\$541	\$12,285	\$12,285
New Brunswick	\$6,000	\$11,036	\$10,689	\$347	\$11,036	\$11,036
Quebec	\$7,000	\$16,955	\$16,458	\$497	\$16,955	\$16,955
Ontario	\$7,500	\$12,784	\$11,963	\$821	\$12,784	\$12,784
Manitoba	\$6,000	\$10,275	\$9,559	\$716	\$10,275	\$10,275
Saskatchewan	\$7,000	\$11,242	\$10,842	\$400	\$11,242	\$11,242
Alberta	\$7,000	\$8,835	\$7,935	\$900	\$8,835	\$8,835
British Columbia Territories*	\$7,000 \$7,000	\$11,642 \$12,311	\$10,657	\$984 \$1,340	\$11,642 \$12,311	\$11,642 \$12,311
Average	\$6,682	\$11,660	\$10,971	\$688	\$11,660	\$11,660

*Yukon, Northwest Territories and Nunavut

Source: RKA based on Statistics Canada data and other sources.

We have also made allowances for transportation costs for students staying in different provinces and territories.¹⁵ We have relied upon data from Statistics Canada’s Survey of Household Spending (SHS), detailing household spending on public transportation, by province and territory, in 2007. The values we used refer to the median expenditure per household that reported using public transportation. Values in 2008 have been derived by multiplying values in 2007 by the percentage increase in public transportation costs in the same province/territory between 2007 and 2006.¹⁶

For students in other levels of study (trade, other post-secondary, and other), we have assumed that they spend the equivalent of what university students have to pay in an academic year (average room and meal and transportation costs).

¹⁵ There may be double-counting of transportation cost in this Table and previous Table 7, as some universities have included bus passes in their reported “Additional Fees”.

¹⁶ For more information see <http://www.statcan.gc.ca/pub/62-202-x/62-202-x2006000-eng.htm>.

We note that since no data is available for cost of living for college international students in the territories, we have applied the average room and meal costs at the university level plus average public transportation costs in the territories to represent the cost of living for college students in the territories.

In addition to basic living costs as presented above, we have made an allowance of \$2,500 per student per year for discretionary expenses (such as eating out, recreational activities, and entertaining).

For each province and territory, in each level of study, the formula to calculate total expenditure is as follows:

Estimated number of students in that level of study x sum of (average tuition and additional fees, books, average room and meals, average transportation cost, average discretionary spending) per year = Total Foreign Student Expenditure in one year in the level of study

5.2.2. Languages Canada Short Term Students

Information from Languages Canada shows that an average short term student spends \$390 per study week for living expenses including discretionary spending. Thus, for short-term students (1,054,664 study weeks) covered by Languages Canada, the average weekly expenses (including tuition and fees and basic living expenses) amount to \$707.

6. Assessing the Economic Impact of International Education in Canada

In this section, we will combine estimated number of international students in Canada by level of study in each province and territory and estimates on educational and living costs to arrive at an estimation of total expenditure by international students while they study in Canada.

Based on the information above, we have estimated that students in the K-12 system contribute almost \$700 million to the Canadian economy, and those in the university system contribute over \$3.2 billion per year to the Canadian economy. Students in other post secondary institutions contribute another \$1.3 billion. This is shown in Table 9.

Table 9 Estimated Total Expenditure of Foreign Students in Canada by Level of Study, by Province and Territory, 2008

Destination	Secondary or less	Trade	University	Other Post-Secondary	Other	Total
Newfoundland and Labrador	\$2,934,000	\$1,274,000	\$27,915,000	\$5,522,000	\$500,000	\$38,145,000
Prince Edward Island	\$1,548,000	-	\$10,444,000	\$872,000	-	\$12,864,000
Nova Scotia	\$16,398,000	\$3,888,000	\$138,753,000	\$7,387,000	\$1,914,000	\$168,340,000
New Brunswick	\$7,350,000	\$4,192,000	\$65,430,000	\$6,978,000	\$4,965,000	\$88,915,000
Quebec	\$29,448,000	\$32,149,000	\$827,468,000	\$109,320,000	\$26,657,000	\$1,025,042,000
Ontario	\$240,072,000	\$274,152,000	\$1,223,153,000	\$321,637,000	\$103,238,000	\$2,162,252,000
Manitoba	\$18,619,000	\$3,624,000	\$85,473,000	\$6,150,000	\$1,941,000	\$115,807,000
Saskatchewan	\$17,184,000	\$840,000	\$76,544,000	\$3,306,000	\$1,821,000	\$99,695,000
Alberta	\$78,269,000	\$48,747,000	\$189,108,000	\$39,737,000	\$8,723,000	\$364,584,000
British Columbia	\$282,660,000	\$234,376,000	\$604,424,000	\$234,991,000	\$66,710,000	\$1,423,161,000
Territories*	\$1,214,000	-	-	-	-	\$1,214,000
Total	\$695,696,000	\$603,242,000	\$3,248,712,000	\$735,900,000	\$216,469,000	\$5,500,019,000

*Yukon, Northwest Territories and Nunavut

Source: RKA.

In total \$5.5 billion worth of expenditure was put into the Canadian economy in 2008 from those students who studied for six months or longer.¹⁷

To summarize, the average total expenditure per international student (including tuition fees, other fees, books, room and meal, transportation, and discretionary

¹⁷ For comparison, we note that Statistics Canada's annual record of trade in services indicates that, in 2007, total expenditure of international students studying in Canada at the colleges and universities amounted to \$2.6 billion. See http://cansim2.statcan.gc.ca/cgi-win/cnsmcgi.pgm?Lang=E&RootDir=CII/&ARRAY_VREL=3760031&PortalID=3764&ResultTemplate=V3764 for more information.

spending) is estimated to be $\$5,500,019,000 / 178,227 = \$30,860$ in 2008. This amount is applicable for an international student who requires a study permit and stays in Canada for at least six months.

An additional \$746 million per year has been estimated as the contribution from students pursuing short term language training courses. This has been calculated as $1,054,664$ student weeks \times $\$707$ average expenditure per week = $\$745,647,800$.

Combining long-term and short-term students, we estimate that total international student expenditure in 2008 was about \$6.25 billion, a significant contribution to the Canadian economy.

We note that our calculations have made use of various survey results and average expenditure data, as such, our estimates are fairly conservative. We realize that in certain cases the expenditure is substantially above the average. However, without consistent data set that shows that percentage of international students in different level of spending bracket, we have not included such data in our estimates.¹⁸

6.1. Direct Economic Impact

6.1.1. Long Term Students

When we compare international education services in each province and territory with other sectors in the economy, we need to translate that total expenditure values into Gross Domestic Products (GDP), employment, and government revenue contribution.

In this subsection, we make use Statistics Canada's economic multipliers, as derived from its provincial Input-Output Tables, to estimate international education services' contribution to each province's GDP, employment, and government revenue.¹⁹

In Table 10 that follows, we provide our estimates of the total expenditure made by international students who stay in Canada for at least six months, and the corresponding contribution to the province / territory's GDP,²⁰ employment, and government revenue growth, using 2008's values.²¹

¹⁸ One instance is a report from the DFAIT indicating that the total value of the salary stipends alone that the Saudi Cultural Centre pays to its doctors and scholarship students in Canada now exceeds \$16 million monthly (\$195 million annually). In addition, the centre pays tuition for students and spouses, family travel, child benefits, health insurance, dental costs and other expenses.

¹⁹ Statistics Canada, Provincial Input-Output Multipliers, 2004.

²⁰ Total expenditure (or industrial output) refers to the value of outputs produced, whether the

Table 10 Direct Economic Impact of International Education Services, by Province and Territory, 2008

	Total Expenditure	GDP	Employment	Government Revenue
Newfoundland and Labrador	\$38,145,000	\$27,884,000	440	\$1,417,000
Prince Edward Island	\$12,864,000	\$4,313,000	70	\$416,900
Nova Scotia	\$168,340,000	\$122,648,000	2,360	\$6,599,500
New Brunswick	\$88,915,000	\$68,175,000	1,190	\$3,234,800
Quebec	\$1,025,042,000	\$745,539,000	11,840	\$72,539,300
Ontario	\$2,162,252,000	\$1,598,644,000	24,420	\$102,674,000
Manitoba	\$115,807,000	\$82,817,000	1,500	\$5,646,200
Saskatchewan	\$99,695,000	\$70,864,000	1,260	\$4,590,700
Alberta	\$364,584,000	\$262,684,000	4,240	\$8,780,700
British Columbia	\$1,423,161,000	\$1,056,820,000	17,610	\$40,872,300
Territories*	\$1,214,000	\$370,000	10	\$11,400
Total	\$5,500,019,000	\$4,040,758,000	64,940	\$246,782,800

*Yukon, Northwest Territories and Nunavut

Source: RKA based on Statistics Canada's Provincial Input-Output Multipliers, 2004.

Total GDP contribution of international education services amounted to almost \$4.1 billion in 2008 in Canada. By comparison, the GDP contribution of the whole Educational Services sector in Canada was \$60.5 billion. Therefore, international education services accounted for about 6.7% of Canada's overall educational services.

In employment, international education services provided 64,940 jobs in Canada.²² The overall educational services sector in Canada employed about 1,190,000 persons in 2008. Therefore, international educational services provided equivalent to about 5.5% of all the jobs in the educational services sector.

products are used as an intermediate product (think of a log cut down from a tree for the purposes of building houses, for example) or used as a final product (think of a beam in a completed house). If we calculate gross domestic product at the provincial level, or GDP at the provincial level, this way, the cost of the log will be counted many times, as it moves from a raw product to its eventual use as a beam, and it is wrong. The value of total industrial output thus includes both the value of intermediate inputs and primary inputs - the latter being the labour and the capital in production. It is the sum of the latter, which is also referred to as the value added, that is equal to gross domestic product at the provincial level.

²¹ The types of taxes included in the Input-Output Tables include indirect taxes on products as well as indirect taxes on production, at the federal, provincial, and municipal levels, where applicable, net of subsidies on products and/or production.

²² Note that direct economic impact in terms of GDP, employment, and government revenue is not attributed to the educational services industry only. In fact, total expenditure in each province has been allocated to these following industries in the individual provincial input-output model: universities and government education services; retail trade; transit and ground passenger transportation; finance, insurance, real estate and rental and leasing; and arts, entertainment and recreation.

6.1.2. Languages Canada Short Term Students

When we take into account the spending of short-term language students covered by Languages Canada, these foreign students also contributed an additional \$746 million per year in total spending to the Canadian economy. This is equivalent to about \$509 million in GDP, 13,210 jobs, and \$36 million in government revenue.²³ This is represented in Table 11.

Table 11 Direct Economic Impact of Short-Term International Language Students, by Province and Territory, 2008

	Total Expenditure	GDP	Employment	Government Revenue
Newfoundland and Labrador	\$5,171,388	\$3,484,000	80	\$138,600
Prince Edward Island	\$1,743,996	\$1,060,000	30	\$51,800
Nova Scotia	\$22,822,165	\$14,748,000	480	\$952,700
New Brunswick	\$12,054,371	\$8,867,000	190	\$463,200
Quebec	\$138,966,841	\$97,879,000	2,460	\$8,760,400
Ontario	\$293,140,506	\$204,628,000	5,100	\$15,852,500
Manitoba	\$15,700,169	\$9,833,000	400	\$819,800
Saskatchewan	\$13,515,836	\$7,206,000	220	\$583,900
Alberta	\$49,427,328	\$33,748,000	880	\$1,674,700
British Columbia	\$192,940,571	\$127,579,000	3,360	\$7,022,900
Territories*	\$164,584	\$93,000	10	\$1,900
Total	\$745,647,756	\$509,125,000	13,210	\$36,322,400

*Yukon, Northwest Territories and Nunavut

Source: RKA based on Statistics Canada's Provincial Input-Output Multipliers, 2004.

6.2. Comparison of International Education Services in Canada with Other Export Trade

In this sub-section, we will provide a comparison of the total value of international education services by top source country, with the values of Canada's exports of goods and services to these countries. We will also compare the value of total expenditure in international education services in Canada with the total export of goods in Canada. Note that due to data limitation, we will only cover long-term international students in this analysis.

The Table that follows details the number of study permit holders each year (as of December 1st) by top ten source countries.

²³ We do not have the breakdown of these students by province/territory, but have assumed that the distribution of spending by province/territory is the same as the expenditure distribution of long-term students.

Table 12 Number of Foreign Students in Canada by Top Source Countries, 2004 to 2008

Source countries	2004	2005	2006	2007	2008
China, People's Republic of	39,296	39,592	39,843	41,087	42,154
Korea, Republic of	26,719	27,251	29,035	30,084	27,440
United States of America	12,589	12,676	12,357	12,003	11,317
France	6,592	6,739	7,774	8,352	8,553
India	5,759	6,286	6,690	6,932	7,314
Japan	9,446	9,370	8,512	7,791	6,627
Saudi Arabia	1,187	1,468	1,596	2,286	4,672
Taiwan	5,286	4,961	4,902	4,744	4,127
Hong Kong	5,671	5,173	4,765	4,485	4,126
Mexico	3,392	3,599	3,791	3,830	3,853
Top 10 source countries	115,937	117,115	119,265	121,594	120,183
Other countries	48,167	49,285	49,985	53,445	56,740
Countries not stated	734	762	896	1,038	1,304
Total	164,838	167,162	170,146	176,077	178,227

Source: Citizenship and Immigration Canada

Table 13 further shows the percentage distribution of the number of study permit holders of these top source countries amongst all countries.

Table 13 Distribution of Foreign Students in Canada by Top Source Countries, 2004 to 2008

Source countries	2004	2005	2006	2007	2008
China, People's Republic of	23.8	23.7	23.4	23.3	23.7
Korea, Republic of	16.2	16.3	17.1	17.1	15.4
United States of America	7.6	7.6	7.3	6.8	6.3
France	4.0	4.0	4.6	4.7	4.8
India	3.5	3.8	3.9	3.9	4.1
Japan	5.7	5.6	5.0	4.4	3.7
Saudi Arabia	0.7	0.9	0.9	1.3	2.6
Taiwan	3.2	3.0	2.9	2.7	2.3
Hong Kong	3.4	3.1	2.8	2.5	2.3
Mexico	2.1	2.2	2.2	2.2	2.2
Top 10 source countries	70.3	70.1	70.1	69.1	67.4
Other countries	29.2	29.5	29.4	30.4	31.8
Total	100	100	100	100	100

Source: Citizenship and Immigration Canada

In general, foreign students from the top 10 source countries account for about two-thirds of all foreign students coming to study in Canada. Over the period from 2004 to 2008, the number of foreign students from Saudi Arabia has grown the fastest amongst all top ten source countries, at a rate of 40.9% per year, compared with an average rate of 2.0% per year for all students. France and India are the second and third fastest countries experiencing an average growth rate of 6.7% and 6.2% per year over the same period of time. However, international students in Canada from Japan and Hong Kong have been declining at an annual rate of 8.5% and 7.6% respectively.

Overall, international students from these top ten source countries have not grown as fast as that of foreign students from all countries.

By multiplying an average total expenditure per student of \$30,860 in 2008 (see Section 6.1) by the total number of foreign students in each of the top ten source countries, we have calculated the total amount of export in international education services from Canada to each of these countries. This is summarized in Table 14.

Table 14 Number of Foreign Students in Canada by Top Source Countries, and Total Value of International Education Services, 2008

Source countries	2008 Total Expenditure	
China, People's Republic of	42,154	\$1,300,856,778
Korea, Republic of	27,440	\$846,788,205
United States of America	11,317	\$349,238,415
France	8,553	\$263,942,402
India	7,314	\$225,707,322
Japan	6,627	\$204,506,758
Saudi Arabia	4,672	\$144,176,184
Taiwan	4,127	\$127,357,687
Hong Kong	4,126	\$127,326,827
Mexico	3,853	\$118,902,148
Top 10 source countries	120,183	\$3,708,802,726
Other countries	56,740	\$1,750,975,318
Countries not stated	1,304	\$40,240,956
Total	178,227	\$5,500,019,000

Source: Citizenship and Immigration Canada; RKA

Note that the amounts generated as shown here in Table 14 are underestimates of the “true” amount of Canada’s export in educational services as we are only accounting for the number of students who stay in Canada to study for at least six months in a year, but not those in short-term education and training programs.

And, we also have not accounted for Canada's export of educational services in the form of setting up programs on campuses outside of Canada.

We have further compared Canada's export in international education services in each of these top ten countries with other export in goods to the same country. In the case of export to the Peoples' Republic of China, the value of Canada's export in international education services to China in 2008 was \$1.3 billion, and it ranked even higher than any of the top 10 exported goods to China.²⁴ International education services also ranks high when comparing to other export in goods for the Republic of Korea, France, India, Saudi Arabia, Taiwan, and Hong Kong. This is shown in Table 15.

²⁴ The recreate the dataset used by the RKA team, the data is available at: http://www.ic.gc.ca/sc_mrkti/tdst/tdo/tdo.php#tag – the time period is 2008, Product Search is “Top 25 Product Groups – HS4”, and each country was chosen individually.

Table 15 Comparison of International Education Services with Other Top Exports in Goods from Canada to the Top Ten International Student Source Countries, 2008

Export/ Ranked	China, Peoples' Republic of	Korea, Republic of	United States	France	India	Japan	Saudi Arabia	Taiwan	Hong Kong	Mexico	
1	EDUCATION SERVICES \$1.301B	COAL \$1.272B	CRUDE OIL \$63.7B	AIRCRAFT ENGINES \$536.9M	FERTILIZERS \$688M	COAL \$2.3B	BARLEY 225.100	UNWROUGHT NICKEL \$253.3M	UNWROUGHT NICKEL \$241.3M	RAPE OR COLZA SEEDS \$821.5M	
2	ACYCLIC ALCOHOLS \$869.5M	EDUCATION SERVICES \$846.8M	LIQUIFIED PETROLEUM \$36.3B	NON-CRUDE PETROLIUM OILS 307.1M	DRIED LEGUMES \$422.8M	RAPE OR COLZA SEEDS \$1.4B	EDUCATION SERVICES \$144.2M	CHEMICAL WOODPULP \$138.9M	GOLD \$193M	MOTOR VEHICLE PARTS \$479.2M	
3	CHEMICAL WOODPULP \$858.5M	CHEMICAL WOODPULP \$239.6M	MOTOR VEHICLES \$33.7B	EDUCATION SERVICES \$263.9M	NEWSPRINT \$232.3M	MEAT OR SWINE \$801.6M	CHEMICAL WOOD PULP \$65.6M	EDUCATION SERVICES \$127.4M	RAW FURSKINS \$148.3M	ELECTRONIC CIRCUITS \$464.4M	
4	RAPE OR COLZA SEEDS \$782.5M	NICKEL PRODUCTS \$220.9M	NON-CRUDE PETROLEUM \$14.6B	AIRCRAFT PARTS \$242.5M	EDUCATION SERVICES \$225.7M	LUMBER \$760.1M	UNCOATED PAPER \$56.4M	COAL \$118.4M	EDUCATION SERVICES \$127.3M	MOTOR VEHICLES \$332.9M	
5	UNWROUGHT NICKEL \$703.9M	SEMI-CHEMICAL WOOD PULP \$145.5M	MOTOR VEHICLE PARTS \$9.9B	BLOOD \$180.9M	CHEMICAL WOODPULP \$76.7M	COPPER ORES \$737.7M	TANKS AND OTHER ARMOUR \$47.2M	IRON ORES \$86.7M	MOLLUSCS \$65.8M	TELEPHONE SETS \$195.3M	
6	SULFUR \$686M	COPPER ORES \$143.2M	UNWROUGHT ALUMINUM \$5.9B	IRON ORES \$160.9M	AIRCRAFT \$70.7M	WHEAT \$550.9M	NEWSPRINT \$45.2M	NICKEL PRODUCTS \$80.4M	EDIBLE ANIMAL \$62.8M	WHEAT \$179.1M	
7	FERTILIZERS \$534.9M	UNWROUGHT ALUMINUM \$141.2M	MEDICAMENTS \$4.1B	URANIUM \$98.4M	TELEPHONE SETS \$62.2M	UNWROUGHT ALUMINUM \$511.1M	LIFTING MACHINERY \$26.3M	LUMBER \$59.3M	PLANT PARTS \$62.3M	MACHINERY PARTS \$173.6M	
8	SEMI-CHEMICAL WOOD PULP \$409.8M	MEAT OR SWINE \$118.4M	AIRCRAFT \$5.1B	COAL \$88.6M	GOLD \$59.9M	CHEMICAL WOODPULP \$421.4M	COPPER WIRE \$21.1M	POLYMERS OF ETHYLENE \$56.7M	MEAT OR SWINE \$58.5M	COAL \$148.8M	
9	IRON ORES \$315.6M	URANIUM \$63.8M	POLYMERS \$3.9B	TELEPHONE SETS \$86.5M	COPPER ORES \$46M	COBALT \$206.6M	ASH & RESIDUES CONTAINING METAL \$20.6M	RAW HIDES/SKINS \$54.7M	NEWSPRINT \$56.5M	BARS/RODS OF STEEL \$133.2M	
10	RAPE, COLZA OR MUSTARD OIL \$269M	WHEAT \$61.6M	ELECTRICAL ENERGY \$3.8B	NEWSPRINT \$85.3M	ASBESTOS \$44M	EDUCATION SERVICES \$204.5M	NON-DOMESTIC DRYERS \$19.1M	SEMI-CHEMICAL WOOD PULP \$43.5M	SCRAP PLASTICS \$49.4M	UNWROUGHT ALUMINUM \$127.6M	
NOT IN TOP 10			EDUCATION SERVICES \$349.2M							EDUCATION SERVICES \$118.9M	

Source: RKA's calculation of education services; Trade Data Online – Industry Canada

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For comparison, we have also shown the value of international education services in each of the top 10 source countries as a percentage of total value of goods export to these countries. The final row in Table 16 shows the value of international education services in Canada from all long-term international students and the value of Canada's total export in goods.

Table 16 Comparison of International Education Services with Total Exports in Goods from Canada to the Top Ten International Student Source Countries and to All Countries, 2008

	Educational Services	All Goods Exports	Educational Services Compared with Total Goods Export
China, Peoples' Republic of	\$1.301B	\$10.471B	12.4%
Korea, Republic of	\$846.8M	\$3.836BM	22.1%
United States	\$349.2M	\$375.481B	0.1%
France	\$263.9M	\$3.241B	8.1%
India	\$225.7M	\$2.417B	9.3%
Japan	\$204.5M	\$11.091B	1.8%
Saudi Arabia	\$144.2M	\$1.009B	14.3%
Taiwan	\$127.4M	\$1.563B	8.2%
Hong Kong	\$127.3M	\$1.771B	7.2%
Mexico	\$118.9M	\$5.843B	2.0%
Total for Canada	\$5.5B	\$483.630B	1.1%

Source: RKA; Canada Merchandise Exports (Customs Basis) – DFAIT 2009

While the size of international education services is small in comparison with the value of total export in goods to countries such as Japan and the United States, such services contribute substantially to Canada's total export to countries such as the Peoples' Republic of China, South Korea, and Saudi Arabia.

7. Additional Benefit from Tourism Activities

One additional benefit of international education to the host country is the increased tourism activities due to family and friends visiting the host country while students remain in the country.

In Canada, there is no formal research or statistical data available in this regard. What we present here in this section is drawn from research in other countries and/or is anecdotal in nature.

A recent Australian study (Australian Council for Private Education and Training (ACPET), 2009) shows that for every 10 formal visiting student (defined as those whose main purpose of visiting Australia is education), there are an additional five family and friend visitors to the country. For those informal visiting students (defined as those whose main purpose of visiting Australia was not education but still studied a course while on the trip), every 10 bring an additional 2 visitors.

Table 17 Friend and Family Visitors per International Student, Australia, 2006

	Formal Study Tourist	Informal Study Tourist	All Students
Number of Family Visiting	0.3	0.1	0.4
Number of Friend Visiting	0.2	0.1	0.3
Total	0.5	0.2	0.7

Source: Tourism Research Australia 2007, Reproduced from ACPET 2009

If we assume international students visiting Canada follow a similar pattern, we can estimate that the number of family and friend visitors could be as high as 109,000 per year. This is show in Table 18 as follows.

Table 18 Number of Friend and Family Visitors Related to International Students in Canada

	Formal Study Tourist	Informal Study Tourist	All Students
Number of Family Visiting	53,468	10,194	63,662
Number of Friend Visiting	35,645	10,194	45,840
Total	89,114	20,389	109,502

Source: RKA

For travel expenses, we have made use of data available from Statistics Canada's publication *International Travel, 2007*, which indicated that for the

4,116,000 of one or more night travelers to Canada, average expenditure they spent in Canada was \$732.²⁵ (Average number of nights they stayed in Canada was 6.9.)

In Table 19, we summarize our estimates of potential additional benefits resulting from international students travelling with family and friends within Canada.

Table 19 Number of Friend and Family Visitors Related to International Students in Canada

	Formal Study Tourist	Informal Study Tourist	All Students
Students	\$130,462,164	\$74,622,276	\$205,084,440
With Family Visiting	\$39,138,649	\$7,462,228	\$46,600,877
With Friend Visiting	\$26,092,433	\$7,462,228	\$33,554,660
Total	\$195,693,246	\$89,546,731	\$285,239,977

Source: RKA

Therefore, an estimate of \$285,240,000 per year can be attributed to additional tourism related activities, including international students and their family and friends.

We have further estimated the economic impact of such tourism related expenditure on GDP, employment, and government revenue. This is equivalent to about \$161 million in GDP, 5,330 jobs, and \$8 million in government revenue.²⁶ This is represented in Table 20.²⁷

²⁵ See <http://www.statcan.gc.ca/pub/66-201-x/2007000/tablesectlist-listetableauxsect-eng.htm> for information on international travel.

²⁶ We do not have the breakdown of these “tourists” by province/territory, but have assumed that the distribution of spending by province/territory is the same as the expenditure distribution of long-term students.

²⁷ In estimating direct economic impact in terms of GDP, employment, and government revenue related to tourism related activities, total expenditure in each province has been allocated to these following industries in the individual provincial input-output model: retail trade; transit and ground passenger transportation; accommodation and food services; and arts, entertainment and recreation.

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Table 20 Direct Economic Impact of Tourism Activities of International Students and Their Family/Friends, 2008

	Estimated Total Tourist Spending	GDP	Employment	Government Revenue
Newfoundland and Labrador	\$1,978,262	\$1,085,000	40	\$58,000
Prince Edward Island	\$667,148	\$333,000	10	\$18,600
Nova Scotia	\$8,730,388	\$4,273,000	170	\$275,000
New Brunswick	\$4,611,277	\$2,242,000	90	\$95,100
Quebec	\$53,160,354	\$30,082,000	1,030	\$1,471,000
Ontario	\$112,137,924	\$63,988,000	2,060	\$3,343,900
Manitoba	\$6,005,940	\$3,323,000	110	\$235,400
Saskatchewan	\$5,170,346	\$2,430,000	90	\$148,700
Alberta	\$18,907,922	\$10,151,000	330	\$404,200
British Columbia	\$73,807,456	\$42,791,000	1,400	\$2,280,600
Territories*	\$62,960	\$32,000	1	\$1,200
Total	\$285,239,977	\$160,730,000	5,331	\$8,331,700

*Yukon, Northwest Territories and Nunavut

Source: RKA based on Statistics Canada's Provincial Input-Output Multipliers, 2004.

8. Case Studies: Provincial and Non-Urban Best Practices

When this project was undertaken, DFAIT also wanted the consulting team to examine a provincial and non-urban example of how promotion, data collection and interaction are done. The subjects chosen for the case study were the province of Manitoba and its International Education Branch and the International Education program at Thompson Rivers University in Kamloops, British Columbia.

8.1. Manitoba

The following is excerpted from interviews with Darcy Rollins (Director, International Education, Government of Manitoba) and Donna Everitt (Policy Analyst, International Education, Government of Manitoba), supplemented by the materials on the Manitoba International Education Branch website.

Formation:

The International Education Branch in Manitoba was formed in 2000 and has two FTEs. The Branch is associated with the Ministry of Competitiveness, Training and Trade and works closely with the departments of Education, Citizenship, and Youth (ECY), Advanced Education and Literacy (AEL), and Labour and Immigration (LIM).

Mission/Scope of the International Education Branch:

The IEB's scope is broad, encompassing public and private educational institutions such as schools and divisions, universities and colleges, language providers and vocational institutions to enhance the profile of Manitoba internationally and be recognized as a competitive economic centre, a lucrative destination for investment, an attractive location for immigration and international study, and a caring member of the global community. The role of the IEB is to promote global awareness/competency and increase the cross-cultural exposure of Manitobans through mutually beneficial international educational interchanges. As well the IEB works to maximize the benefits of international education to the Manitoba economy while encouraging a holistic approach to international education that engages all levels of education, all stakeholders, all fields of study/training, and all regions of Manitoba. As well, the IEB's role is to enhance foreign recognition of Manitoba as an excellent source of high quality, affordable education and training programs, services, and products.

Future Role of the IEB:

Over the next few years the IEB hopes to advance the objectives of the International Education Strategy for Manitoba (see <http://www.gov.mb.ca/ie/about/mandate.html>).

Access:

The IEB will work with the federal government, provinces and territories on projects related to immigration and study permit matters as well as identifying areas of greatest opportunity in terms of international markets and sectors of education and training.

Promotion:

The Branch will also organize Manitoba marketing missions and support the marketing activities of institutions and school divisions as required while developing system-wide promotional materials such as brochures, web-sites, and CDs.

Capacity-Building:

The IEB will also coordinate the development of the province's capacity to deliver international education programs and facilitate cooperative delivery where advisable, promote greater and more diverse international education activities in Manitoba institutions. The Branch will also encourage institutions and school divisions that are not currently involved in international education to consider becoming active in this area, while encouraging institutions that are currently involved in international education to increase their capacity to deliver quality programs. As well, challenges that Manitoba school divisions might face in developing successful international education programs will be identified and work will be done to develop possible solutions.

Resources:

The IEB will provide access to resource information on best practices, standards of service, and emerging issues and develop additional and/or Manitoba-specific information where necessary while researching, compiling, and sharing information on opportunities and sources of funding for involvement in international education. The Branch will also provide a supportive policy framework for the development of international education throughout Manitoba and develop criteria for use by the Branch and institutions in qualifying opportunities presented to Manitoba.

Advocacy:

The International Education Branch will represent Manitoba's interests in national, governmental and other associations related to international education. The IEB will also receive international education colleagues and connect them with institutions and school divisions while coordinating activities with other Manitoba government departments and with other Canadian jurisdictions.

Communication with Like Agencies:

The Branch communicates with colleagues in other provinces, as well as with national and international organizations on a regular and issue by issue basis. Manitoba communicates with federal, provincial, and territorial governments on concerns related to international education. Manitoba (IEB) co-chairs the Federal-Provincial Consultative Committee on Education-Related International Activities (FPCCERIA). Manitoba's representation also includes representatives from the departments of ECY and AEL. Domestically under the auspices of the Council of Ministers of Education, Canada (CMEC), Manitoba is leading discussions with the provinces/territories and the federal government on coordinating pan-Canadian efforts to promote Canada internationally. IEB works closely with Citizenship and Immigration Canada (CIC) on various issues (e.g., risk management policies in IE, study permit issues). Manitoba also engages in activities with international education organizations.

Relationship with Education Sectors in Manitoba:

The IEB works closely with all the various education sectors within the province and serves all institutions, organizations and the general public in matters related to international education. The IEB is a non-voting member, active participant in provincial sector council organization devoted to international education matters ([Manitoba Council for International Education](#)) which includes Manitoba public/private schools, post secondary institutions and language program providers. In Manitoba, the departments of ECY, AEL and LIM have the overall mandates with respect to these institutions.

Data Collection:

The IEB conducts yearly surveys of international students enrolled in Manitoba public/private schools, post secondary institutions and language program providers. See surveys http://www.gov.mb.ca/ie/ie_res/st_rep.html.

IEB Role in Marketing Manitoba to International Students:

The IEB serves as a first-contact for international education matters, develops international education policy, and responds to inquiries from international students, agents, and institutional partners. The IEB liaises with institutions and organizations to coordinate recruitment, organizes and leads education missions

abroad, offers marketing assistance, and develops marketing strategies that promote Manitoba's educational opportunities. IEB supports and maintains promotional materials and a website devoted to highlighting the province's educational opportunities to international learners.

Data Collection

A national agency (Citizen and Immigration Canada) already collects and maintains data on international students in Canada. CIC data, apart from providing long term interprovincial comparisons on permit holders relies on a methodology that does not account for all international students studying in Manitoba or Canada (program type, level of study, length of stay, etc. absent). As such, Manitoba would be open to discussing how better data could be collected/maintained. Improvements to education data generally, including international education, are being discussed through CMEC and the joint CMEC/Statistics Canada body the Canadian Education Statistics Council (CESC). Research on international education is also relevant to the overall research interests of CMEC. Should another body be considered which would collect data AND especially if it is considered to promote international education, consultations with provinces and territories would be essential.

Future Goals:

The IEB would like to assess the full economic impact of international students to Manitoba, including the spin off effects from international students' work, recreation, family/friends visits and other economic multipliers and having the same info for other provinces/territories and having similar information from jurisdictions abroad. The province faces capacity challenges at institutional and systemic levels: increased awareness of the importance of this field and its potential for substantial positive impacts for the education systems, economy, and international influence might assist in leveraging greater support for its growth and advancement.

8.2. Thompson Rivers University

Thompson River University (TRU's) international student enrollment has been strong in recent years. In fact, when compared with the four other universities in the province with respect to undergraduate student enrollment, TRU has experienced the strongest growth between 2004/05 and 2007/08.

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International Student Headcounts					Average
	2004/05	2005/06	2006/07	2007/08	Annual Growth
TRU	925	1,003	1,112	1,526	18%
SFU	2,094	2,384	2,524	2,802	10%
UBC	4,720	5,563	5,755	6,112	9%
UNBC	183	169	192	210	5%
UVIC	1,595	1,683	1,714	1,620	1%

Source: BC Ministry of Advanced Education

It is also important to note that the share of international students of all full-time ad part-time enrollment at TRU is higher than the average for BC's six public research universities (Royal Roads University, Simon Fraser University, Thompson-Rivers University, University of British Columbia – both Okanagan campus and Vancouver campus, University of Northern BC, and the University of Victoria), as shown below.²⁸

2006/07	RRU	SFU	TRU	UBCO	UBCV	UNBC	UVic	Grand Total
International Students as % of Overall Headcount	38%	10%	12%	3%	13%	5%	9%	12%

Source: derived from British Columbia Higher Education Accountability Dataset available from <http://www.bcheadset.com/>

The strong growth in TRU's ability to attract international students can be attributed to the university's commitment to develop a niche market for itself as well as the coordinated efforts put forward by TRU World's staff.

Internationalization has become a key component in the competitive area of post-secondary recruitment. As domestic student enrolment declines, attracting international students often provides the population necessary for faculty recruitment and retention or in some cases for the continuation or implementation of entire programs.

²⁸ Note that most of the international student enrollment at the Royal Roads University (RRU) are students in its MBA program delivered overseas. Thus, when enrollment in this university is excluded, TRU's international student ratio is higher than average.

“There are any number of compelling reasons for Canadian institutions to pursue international activities. The benefits for our students, our institutions, our local communities and our country are well documented. International engagement opens the door to a wide range of economic, cultural, and scholarly exchange—an interchange that only becomes more vibrant and more necessary in our increasingly interconnected global society. Internationalization, therefore, is a pathway to global citizenship for both our institutions and our students.”

*Roger H. Barnsley
President and Vice-Chancellor of TRU
AUCC Roundtable 2006*

TRU attributes its success as from the following:²⁹

- Establish a clear vision for internationalization.

Clarity of purpose, and the degree to which this is expressed in policies and practices for international engagement, is key to focusing and prioritizing efforts within the institution and to the effective formulation of goals and strategies. TRU’s international policy clearly sets out the guiding principles and scope of international engagement for the university. The introductory section to its policy statement notes, “With greater economic interdependence on a global scale, societies need to work together towards a stable and peaceful world economy. Cultural understanding is an important precursor to increased economic ties, and education is a major vehicle that can enhance these cultural and social bonds.”

- Recognize that participation in internationalization requires a commitment of time and resources at the institution, department, and individual level. Encourage a culture of entrepreneurship, and provide incentives for participation in international initiatives. In their case, the overseas linkages, offshore programming, international student enrollment, and contract training within its portfolio have permitted TRU to build its international capacity: they maintain a staff of more than 30 in the international division to lead their efforts, and this in turn has allowed them to create new opportunities for their faculty and students – through study abroad programs, field schools, joint research initiatives, assignments and projects overseas, and cultural exchange – all of which has contributed to a more internationalized campus and to a perspective of global engagement.

The process of internationalization can yield many benefits, including:

²⁹

From http://www.truworld.ca/_shared/assets/internationalization6667.pdf

- Rich cultural exchanges on campus and in the community
- Opportunities for students (both Canadian and international) to build potential partnerships for the future
- Canadian student exposure to other perspectives
- Opportunities for educational exchange programs for Canadian students (Study Abroad)
- Opportunities for faculty exchange
- Increased student population
- Economic (institutional/regional)

In fact, the economic benefit of recruiting international students to the TRU campus has been positive and substantial, as documented in a 2005 report "*The Economic Impact of Thompson River University's International Students on the Kamloops Economy: 2005-06*" (Seldon 2005). Here are some highlights of the local economic impact:

- At current levels, international students attending Thompson Rivers University are responsible for approximately \$22,688,000 in annual direct contributions to the Kamloops economy. Taking multiplier effects into account, the impact amounts to some \$41.6 million in annual contributions.
- Internationalization initiatives provide TRU with additional annual revenue presently exceeding \$12 million. Departments welcoming large numbers of international students are supported by these additional funds, which also subsidize numerous other initiatives across campus.
- Increase capacity for Canadian students by as much as 10%.

“To illustrate, assume that \$8 million in international tuition and fee revenue (out of the nearly \$10.6 million estimated for 2005–2006) is used to hire faculty and non-instructional staff in equal proportions and that TRU costs, including benefits, would be \$75,000 per faculty member and \$45,000 per staff. At the weighted average cost of \$60,000 in wages and benefits per employee, the result would be TRU’s hiring 66.7 new full-time faculty members. Assume that on average, each new faculty member would teach 7 courses, that average course capacity would be 30 students, and that (consistent with the tuition estimate) the typical international student enrolls in 9.5 courses.

The effect would be to generate 14,000 total new seats. International students would occupy 7,686. That would leave a total of 6,314 net new seats available for Canadians – spaces for 631 new full-time Canadian students, representing an increase in TRU’s capacity of roughly 10% - financed entirely by international student enrolment.”

*Dr. James R. Seldon, TRU Department of Economics
The Economic Impact of TRU’s International Students
on the Kamloops Economy: 2005–2006 Update*

- Additional impact of up to \$70 million from recent and current construction activity in Kamloops.

Indirectly, international students also helped to bring the local public transit system to the city of Kamloops.³⁰

³⁰ Based on RKA’s previous research.

9. Canada's Performance in the Global Market

It is also interesting to compare how Canada fares in the international education services market amongst developed countries which also promote drawing international students for higher education. As we mentioned earlier, to remain competitive in the global economy, Canada needs to attract the best and the brightest to contribute to our talent pool in many areas – scientific and research development, economic development opportunities, cultural diversification, just to name a few. International students studying in Canada not only bring in substantial income to the local communities, but also become a valuable source of highly skilled labour to our economy at a time when the western world is facing potential labour shortages especially among top talent.

In this section, we present statistics available from the UNESCO Institute for Statistics regarding international student mobility at the tertiary level by country. In Table 21, we have shown the number of international students in selected host countries from 1999 to 2007.

Table 21 Number of Tertiary Level International Students in Selected Host Countries, 1999 to 2007

Year	1999	2000	2001	2002	2003	2004	2005	2006	2007
Host Country									
Australia	117,485	105,764	120,987	179,619	188,160	166,954	177,034	184,710	211,526
Japan	56,552	59,691	63,637	74,892	86,505	117,903	125,917	130,124	125,877
New Zealand	6,900	8,210	11,069	17,732	26,359	41,422	40,774	...	33,047
Canada	40,033	40,404	45,693	52,596	59,874	70,023	75,546	68,520	...
France	130,952	137,085	147,402	165,437	221,567	237,587	236,518	247,510	246,612
Germany	178,195	187,033	199,132	219,039	240,619	260,314	259,797	207,994	206,875
United Kingdom	232,540	222,936	225,722	227,273	255,233	300,056	318,399	330,078	351,470
United States	451,935	475,169	475,168	582,996	586,316	572,509	590,158	584,719	595,874
... Data not available									
World Total	1,643,307	1,760,866	1,839,431	2,146,820	2,388,057	2,462,151	2,499,720	2,560,862	2,600,367

Source: UNESCO Institute for Statistics

Table 22 further shows the year to year growth in the number of international students in these countries, and the average annual growth rate during the period.

Table 22 Change in the Number of Tertiary Level International Students in Selected Host Countries, 1999 to 2007

Year to year	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	Average Annual Growth Rate
Host Country									
Australia	-10%	14%	48%	5%	-11%	6%	4%	15%	8%
Japan	6%	7%	18%	16%	36%	7%	3%	-3%	11%
New Zealand	19%	35%	60%	49%	57%	-2%	22%
Canada	1%	13%	15%	14%	17%	8%	-9%	...	8%
France	5%	8%	12%	34%	7%	0%	5%	0%	8%
Germany	5%	6%	10%	10%	8%	0%	-20%	-1%	2%
United Kingdom	-4%	1%	1%	12%	18%	6%	4%	6%	5%
United States	5%	0%	23%	1%	-2%	3%	-1%	2%	4%
... Data not available									
World Total	7%	4%	17%	11%	3%	2%	2%	2%	6%

Source: UNESCO Institute for Statistics

Of all these countries under comparison, New Zealand and Japan have experienced the strongest growth in the number of international students in their countries for college and university education. Canada ranks about average, although the most recent data indicate that number of international students in Canada (in 2006) actually declined over the year before.

Table 23 shows the number of tertiary level international students in these selected countries in 2006, (the most recent year there are data for Canada,) and their shares in the global market.

Table 23 Number of Tertiary Level International Students in Selected Host Countries and Market Share, 2006

Year	2006	Percentage Distribution
Host Country		
Australia	184,710	7.2%
Japan	130,124	5.1%
New Zealand
Canada	68,520	2.7%
France	247,510	9.7%
Germany	207,994	8.1%
United Kingdom	330,078	12.9%
United States	584,719	22.8%
... Data not available		
World Total	2,560,862	100.0%

Source: UNESCO Institute for Statistics

Data in this table indicate that Canada took in only about 3% of all international students in the global market, slightly more than New Zealand (its share was

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1.6% in 2005). By comparison, Australia, a country similar in size and population to Canada, took up 7.2% of the global market in this area. Of all these selected countries, US accounted for the largest market share, at 22.8%.

10. Conclusions and Recommendations

Conclusions:

- No central clearing house of data in the following areas:
 - International student enrolment and tuition at private school/institutions
 - Non-visa students taking courses in Canada lasting less than six months
 - CIC has no formal method of collecting data regarding students who enter Canada as visitors.
- The Canadian Tourism Council does not recognize students as tourists and thus does not collect data on those entering Canada for educational purposes.
- There are no regular surveys of international student spending at a national level.

Conclusions regarding the data:

- The source of data we used to represent enrolment of international students in the Canadian educational system for at least six months in a given year is the stock of foreign students as of December 1st each year in five levels of study in each province/territory, as reported by the Citizenship and Immigration Canada.
- In 2008, total number of long-term (studying for at least six months) international students in Canada was estimated to be 178,200.
- International students heading for university level of training account for more than half (about 54%) of all international students. Together with those going to vocational trade and other post secondary education and training institutions, international students account for more than three-quarters of all international students in the country.
- Over a period of 10 years between 1998 and 2008, international student enrolment in other post secondary level of training (that is, non vocational trade) grew the fastest, followed by enrolment of international students to the university system.

- Between 1998 and 2003, enrolment of international students at the university level experienced double-digit annual growth rates. However, in recent years since 2005, it has not grown as fast as the average for all students.
- Enrolment of international students in vocational trade colleges also enjoyed strong double-digit annual growth from 1998 up to 2003. However, enrolment of students at this level of study has been declining steadily since 2004 and this trend continued in 2008.
- For short-term international students (those staying for shorter than six months), our source of information (Languages Canada) indicated that there were about 102,000 students, or 1,054,664 study weeks, in Canada in 2008.
- The economic benefit of international students studying in Canada is substantial. Total expenditure of long-term international students in Canada amounted to about \$5.5 billion in 2008. This translates to almost \$4.1 billion in GDP contribution to the Canadian economy, and represents about 7% of the GDP contributed by the overall education services sector in the Canadian economy.
- We also estimated that international education services serving these long-term students contributed to 64,940 jobs in the labour market. This represents about 5.5% of the total number of jobs in the overall education services sector in Canada.
- Those foreign students in short-term language training programs in Canada also contributed an additional \$746 million per year in total spending to the Canadian economy. This is equivalent to about \$509 million in GDP, 13,210 jobs, and \$36 million in government revenue.
- In addition to capturing economic impact resulted from spending on tuition and fees and basic living expenses, we estimate that \$285,240,000 per year can be attributed to additional tourism related activities, including international students and their family and friends. This is equivalent to about \$161 million in GDP, 5,330 jobs, and \$8 million in government revenue.
- Canada's international education services for long-term students alone contribute to the equivalent of 1% of Canada's total export in goods to the world. However, for top international student source countries such as China, South Korea, and Saudi Arabia, Canada's international education services to these countries contribute to more than 10% of Canada's export in goods to these countries.

Recommendations

- Consider the possibility of establishing a survey method like that undertaken in Australia where a sample of visitors leaving the country would be surveyed regarding their activities in Canada. This would need to be done at all major international airports and would need to be carried out in a number of languages.
- Work with stakeholders (including CIC, Statistics Canada, and universities, colleges, and other training institutions) to develop a consistent system of record-keeping to track international student expenditures while in Canada.
- Work with Statistics Canada to develop a national survey of public and private educational institutions to determine international student enrolment, tuition rates, and other expenses for degree/diploma granting programs as well as adult and continuing education classes of under six months.
- Coordinate with provincial governments and national organizations to determine consistent survey questions for international students.
- Insure that international students are recognized and supported commensurate to their importance to Canada relative to other similar sized exports of goods and services.

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Study in Alberta: <http://www.studyinalberta.ca/>

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Quebec Ministère de l'Éducation, du Loisir et du Sport: www.mels.gouv.qc.ca

Appendix I List of Persons Contacted

Contact	Position	Institution
Bo Hansen	Manager, Int Ed	Advanced Ed BC
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Susan Penner	Inspector Independent Schools	BC Ministry of Ed
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Peter Mitchell	ED	CAIS
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Andrea Labelle	Director of Business Relations	Tourism Industry Association of Canada
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Amiral Consulting		
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Schools in Canada		
Study in Alberta (Secondary and Post Secondary)		