

A world map rendered in a light blue, dotted pattern against a solid blue background. The map shows the outlines of continents and major landmasses.

PRESENTATION

# Where Students Will Come From Next: Emerging Markets for Student Mobility

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## What we'll talk about...

- How to select and prioritize new markets
- Some of the most promising growth markets
- Internal planning and execution

# Congratulations Canada!

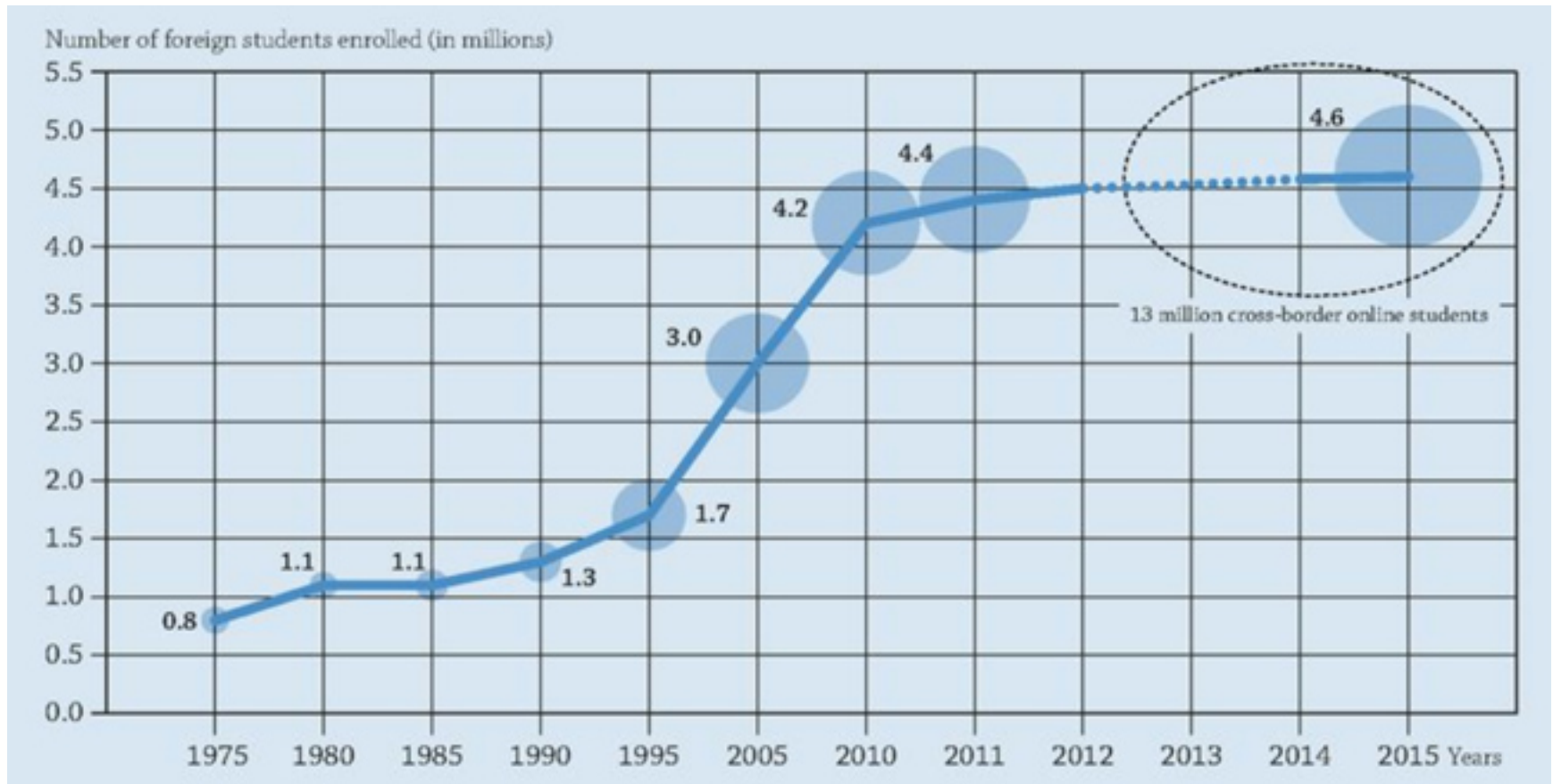


	ENROLMENT	% OF TOTAL
India	172,625	30.16%
China	142,985	24.98%
South Korea	24,195	4.23%
France	22,745	3.97%
Vietnam	20,330	3.55%
United States	14,620	2.55%
Brazil	13,835	2.42%
Nigeria	11,290	1.97%
Iran	10,885	1.90%
Japan	8,365	1.46%
Mexico	7,835	1.37%
Bangladesh	6,520	1.14%
Saudi Arabia	5,100	0.89%
Philippines	5,070	0.89%
Taiwan	4,700	0.82%
Turkey	4,385	0.77%
Hong Kong	4,045	0.71%
Colombia	4,035	0.70%
Pakistan	3,965	0.69%
United Kingdom	3,415	0.60%

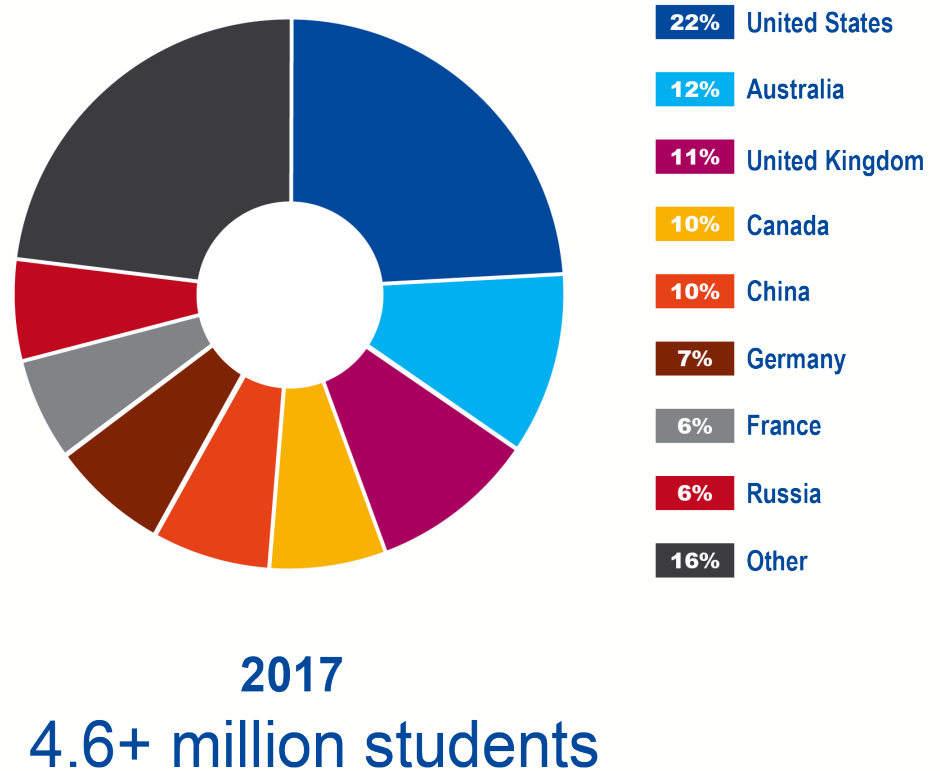
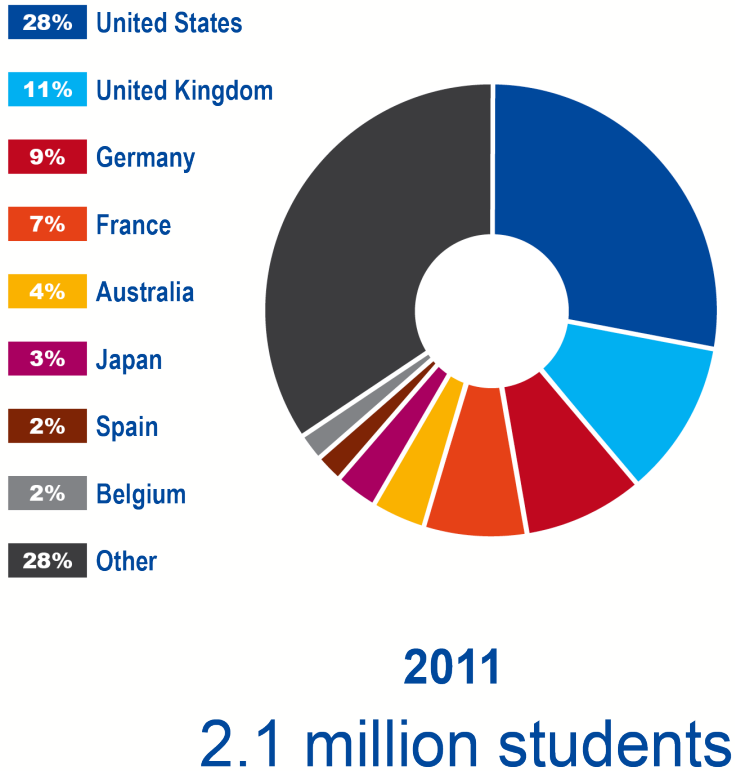
“Only when the tide goes out do you discover who's been swimming naked”



# Big Picture



# Competing for Share



# Big Goals



720 000 onshore enrolments by 2025

**Australia**



450 000 international students by 2022

**Canada**



500 000 international students by 2020

**China**



44 000 foreign students by 2019/20

**Ireland**



Increase international student intake by 20% (amounting to 470 000 based on current levels)

**France**



350 000 inbound internationally mobile students by 2020

**Germany**



300 000 international students by 2020

**Japan**



200 000 foreign students by 2023

**South Korea**



143 000 international students by 2025

**New Zealand**



58 000 foreign students by 2019

**Taiwan**



250 000 international students by 2025

**Malaysia**





# Market Fundamentals

- Growing population
- College-aged demographics
- Economic growth and expanding middle class
  
- Labour market demand
- Domestic capacity for higher education
- Secondary school system
  
- Ability to move people and funds

# Vietnam

- One-third of the population will join middle class by 2020
- Young and growing population
- Significant quality and capacity issues in higher education
- #6 sending market for US
- Key to market: Career opps



# Colombia

- Third-largest economy in Latin America
- The region's most-educated country by 2025
- Rapid growth in tertiary enrolment and outbound
- Key to market:  
Language support



STEP-BY-STEP

# Market Fit

- Program demand
- Required services or supports
- Underlying travel or migration patterns
- Competitive landscape

# Nigeria

- Huge college-aged population
- Unmet demand for higher ed
- Fast-growing market for post-grad
- Key to market: Degree market, price sensitivity



# Bangladesh

- Massive population
- Middle class growth
- Quickly changing
- Key to market: Degree market, price sensitivity



# Nepal

- Hot economy, fast-growing college population
- Quality challenges
- #2 for US after India
- Key to market:  
*Degree market*





STEP-BY-STEP

## Market Connection

- Do we have students from there already?
- Do we know which programmes students from that country are looking for?
- Do we have alumni or staff that we can leverage for market entry?

STEP-BY-STEP

## Begin

- Research and plan
- Make local connections
- Get on the ground

THANK YOU

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