

2023 Findings: **ICEF Agent Voice**

Up to date insight into
global student recruitment
agents' changing world.

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St. George's University
SCHOOL OF MEDICINE

Grenada, West Indies

Introduction

- Initially launched in 2020, ICEF Agent Voice is an annual survey voicing the opinions of student recruitment agents across the globe
- Allows us to view student recruitment through eyes of recruitment agents globally
- 6 Key Topics & IRCC data
- Download the 2023 report at www.icef.com/agent-voice



Key Topics



1 Recruitment expectations

2 Student decision-making

3 Employability

4 Enrolment challenges

5 Online programmes

6 Agency operations



Agent profile





662

Agents



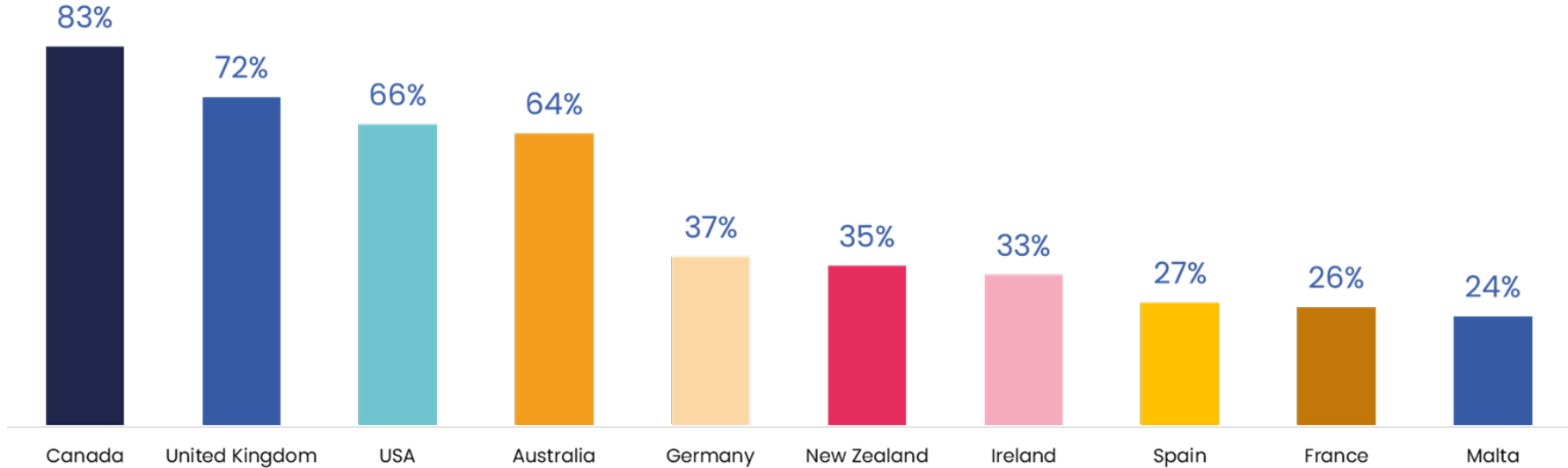
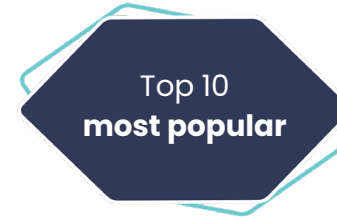
92

Countries



Popular study destinations

Which study **destinations** have you sent students to?



Popular study destinations

Can **Canada** stay ahead in the eyes of agents?

MISLEADING HEADLINES?

Because according to IRCC data, the 35% cap is not actually a 35% cap when you take K-12, Master's and PhD study permits out of the data sets

Home · Canada & World

New admissions cap will cut international student visas by 35 per cent

Canada's Immigration Minister says government trying to curb systemic issues

The Canadian Press
Jan 22, 2024 6:50 AM



Canada

Cap on international study permits sparks fear of rising tuition, program cuts, layoffs on campus

Study permit cap 'signalling to international students that they're a little bit less welcome': expert

[Jessica Wong](#) · CBC News · Posted: Jan 27, 2024 1:00 AM PST | Last Updated: January 29

New admissions cap will cut international student visas by 35 per cent

Canada's Immigration Minister says government trying to curb systemic issues

The Canadian Press
Jan 22, 2024 6:50 AM



News / World News / Canada caps foreign student permits by 35%

Canada caps foreign student permits by 35%

By [Anirudh Bhattacharyya](#) X

Jan 23, 2024 09:26 AM IST



For 2024, the cap is expected to result in approximately 360,000 approved study permits, a decrease of 35% from 2023



IRCC Statistics on Canadian Study Permits



PAGE 3 OF 5

Applicant Name _____ Date of Birth _____

3 Telephone no. Canada/US Other

4 Alternate Telephone no. Canada/US Other

5 Fax no. Canada/US Other

6 E-mail address _____

DETAILS OF INTENDED STUDY IN CANADA

1 I have been accepted at the following educational institution (Attach the original letter of acceptance).

*a) Name of School _____ * b) My level of study will be: _____ c) My field of study will be: _____

d) Complete address of school in Canada

*Province _____ *City/Town _____ *Address _____

2 a) Designated Learning Institution # (DLI) _____ b) My Student ID # is _____ *From _____ *To _____

4 The cost of my studies will be: _____ 5 *Funds available for my stay _____ b) Other _____

*Tuition _____ *Room and board _____ *Other _____ *CAD _____

If you are less than 17 years of age, you must fill out the Custodian Declaration (IMM 5646) form.

EDUCATION

Have you had any post secondary education (including university, college or apprenticeship training)? *No *Yes

If you answered "yes", give full details of your highest level of post secondary education.

1 From _____ To _____ Field and level of study _____ School/Facility name _____

City/Town _____ Country or Territory _____ Province/State _____

EMPLOYMENT

Give details of your employment for the past 10 years, including if you have held any government positions (such as civil servant, judge, police officer, mayor, member of parliament, hospital administrator).

1 From _____ To _____ Current Activity/Occupation _____ Company/Employer/Facility name _____

City/Town _____ Country or Territory _____ Province/State _____

From _____ Previous Activity/Occupation _____ Company/Employer/Facility name _____

- Study Permit Categories**
- CEGEP - Pre-university
 - CEGEP - Technical
 - College - Applied degree
 - College - Certificate
 - College - Diploma
 - ESL/FSL
 - ESL/FSL and College
 - ESL/FSL and University
 - PTC/TCST/DVS/AVS
 - University - Bachelor's Deg.
 - University - Doctorate
 - University - Master's Deg.
 - University - Other Studies
 - Primary School
 - Secondary School
 - Other Studies
 - Not Applicable

HE Applications grouped together

K-12

What students choose when unsure of category to pick in application

IRCC Dataset #1

Study Permits
Processed
in 2023

856,886 Total

Number of Study Permit Applications (Excluding extensions) Approved & Refused (Including Rates)* by IRCC between January 1, 2023 and December 31, 2023, Broken Down by Study Level & Age at Application (in Persons)

Level of Study	2023			
	Approved	Refused	Approval Rate	Refusal Rate
Age between 0 - 19	198,259	69,551	74%	26%
College	72,448	20,264	78%	22%
ESL/FSL	4,555	2,571	64%	36%
Other Post Secondary	3,088	1,747	64%	36%
Other Studies	3,546	1,071	77%	23%
Primary School	40,370	16,156	71%	29%
Secondary School	35,295	12,060	75%	25%
University - Doctorate	7	6	54%	46%
University - Bachelors	34,015	13,952	71%	29%
University - Masters	144	88	62%	38%
University - Other Studies	4,680	1,121	81%	19%
Unknown, Missing or Invalid	111	515	18%	82%
Age between 20 - 25	186,684	132,191	59%	41%
College	107,664	67,060	62%	38%
ESL/FSL	5,366	6,684	45%	55%
Other Post Secondary	3,959	6,405	38%	62%
Other Studies	9,963	4,518	69%	31%
Primary School	2	7	22%	78%
Secondary School	147	221	40%	60%
University - Doctorate	1,393	99	93%	7%
University - Bachelors	25,285	34,526	42%	58%
University - Masters	23,621	7,101	77%	23%
University - Other Studies	9,246	5,511	63%	37%
Unknown, Missing or Invalid	38	59	39%	61%
Age between 26 - 30	67,422	71,379	49%	51%
College	37,366	33,877	52%	48%
ESL/FSL	2,137	4,326	33%	67%
Other Post Secondary	1,370	3,838	26%	74%
Other Studies	3,455	2,293	60%	40%
Primary School	1		100%	0%
Secondary School	11	26	30%	70%
University - Doctorate	2,148	284	88%	12%
University - Bachelors	3,561	12,126	23%	77%
University - Masters	12,928	9,691	57%	43%
University - Other Studies	4,443	4,892	48%	52%
Unknown, Missing or Invalid	2	26	7%	93%
Age 31+	57,771	73,629	44%	56%
College	32,688	40,903	44%	56%
ESL/FSL	2,529	3,609	41%	59%
Other Post Secondary	1,868	2,948	39%	61%
Other Studies	1,594	1,563	50%	50%
Primary School		1	0%	100%
Secondary School	15	32	32%	68%
University - Doctorate	1,523	511	75%	25%
University - Bachelors	1,635	6,386	20%	80%
University - Masters	11,584	11,404	50%	50%
University - Other Studies	4,321	6,203	41%	59%
Unknown, Missing or Invalid	14	69	17%	83%
Grand Total	510,136	346,750	60%	40%



*Source: IRCC Statistical Reporting Group

IRCC Statistics on Canadian Study Permits



Study Permits **Processed** in 2023

Study Permits Processed 2023		
	856,886	
K-12	MASTERS & DOCTORATE	TOTAL
104,344	82,532	186,876

Therefore...

Cap'd Sectors Study Permits Processed 2023:
670,010

(856,886 - 186,876)

IRCC Statistics on Canadian Study Permits



Study Permits **Approved** in 2023

Study Permits Approved 2023		
	510,136	
K-12	MASTERS & DOCTORATE	TOTAL
75,841	53,348	129,189

Cap'd Sectors Study Permits Approved 2023
380,947

$510,136 - 129,189$

Max number of study permits to be processed in 2024 in capped sectors

***606,250**

(compared to 670,010 in 2023)

= **9.6% reduction**
in Study permits to be processed

Canada Cap'd Sector Approval %
57%
$(380,947 / 670,010)$

K-12 Approval Rate	Masters Approval Rate	Doctorate Approval Rate
73%	65%	85%

**But each province varies*

Approved SPs: 380,947 to 364,000 "cap"

= **4.5% reduction**

(not 35!)

Misleading headlines have been confusing agents + students abroad

Provincial Allocation Projections

Study Location	Population (Q4 2023)	% of Population	Application Cap Projection
Alberta	4,756,408	11.7%	71,149
British Columbia	5,581,127	13.8%	83,486
Manitoba	1,465,440	3.6%	21,921
New Brunswick	842,725	2.1%	12,606
Newfoundland and Labrador	540,418	1.3%	8,084
Northwest Territories	44,760	0.1%	670
Nova Scotia	1,066,416	2.6%	15,952
Nunavut	40,817	0.1%	611
Ontario	15,801,768	39.0%	236,373
Prince Edward Island	175,853	0.4%	2,631
Quebec	8,948,540	22.1%	133,858
Saskatchewan	1,218,976	3.0%	18,234
Yukon	45,148	0.1%	675



Disclaimer: Projections for 2024 are estimates only calculated with available 2023 IRCC data and Stati population data, and contain certain underlying assumptions due to continuing data availability limit 2024. ApplyBoard is not liable for accuracy of the projections.

Total: **606,250**



Study Location	2023 Approvals	2021-23 Average Approval Rate
Alberta	22,425	63.3%
British Columbia	58,203	64.7%
Manitoba	9,409	47.6%
New Brunswick	5,812	38.1%
Newfoundland and Labrador	1,172	46.4%
Northwest Territories	4	16.3%
Nova Scotia	7,764	42.4%
Nunavut	2	31.6%
Ontario	223,865	58.1%
Prince Edward Island	1,295	51.1%
Quebec	36,800	36.0%
Saskatchewan	6,314	44.3%
Yukon	80	54.1%



Disclaimer: Projections for 2024 are estimates only c Canada Q4 population data, and contain certain unc limitations as of February 9, 2024. ApplyBoard is not

Total Average: **46%**

Source: [Applyboard](#) [Applyinsights](#)

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Alberta	4,756,408	11.7%	71,149
British Columbia	5,581,127	13.8%	83,486
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9,300



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Ontario	223,865	58.1%
Prince Edward Island	1,295	51.1%
Quebec	36,800	36.0%
Saskatchewan	6,314	44.3%
Yukon	80	54.1%

3,543



Disclaimer: Projections for 2024 are estimates only c Canada Q4 population data, and contain certain unc limitations as of February 9, 2024. ApplyBoard is not

"NB schools will be allowed to send a total of 9,300 acceptance letters in order to attract 5,580 students"
-Feb 26, 2024 (CBC)



2024 Number of Study Permits Per Province

Based on IRCC Dataset #2



Canada - Study permit holders by province/territory of intended destination, study level and year in which permit(s) became effective

Assumption: Study Permit Renewals included in these numbers

Province/Territory and study level	2022 Total	2023 Total (Including Renewals)
Secondary or less	840	850
Post Secondary	3,010	3,220
Other Studies	50	75
Education level not stated	0	--
Newfoundland and Labrador	3,895	4,140
Secondary or less	590	750
Post Secondary	1,600	1,860
Other Studies	225	480
Education level not stated	--	--
Prince Edward Island Total	2,405	3,080
Secondary or less	2,495	3,755
Post Secondary	9,715	11,520
Other Studies	955	810
Education level not stated	--	10
Nova Scotia Total	13,125	16,050
Secondary or less	1,995	2,955
Post Secondary	5,525	7,765
Other Studies	135	205
Education level not stated	--	5
New Brunswick Total	7,645	10,915
Secondary or less	6,750	9,980
Post Secondary	49,895	59,720
Other Studies	6,255	8,475
Education level not stated	10	15
Quebec Total	62,670	77,960
Secondary or less	31,545	45,350
Post Secondary	238,590	295,590
Other Studies	21,565	23,570
Education level not stated	80	100
Ontario Total	289,950	363,020
Secondary or less	3,050	4,450
Post Secondary	10,760	13,775
Other Studies	1,090	1,090
Education level not stated	--	5
Manitoba Total	14,780	19,210

Assumption:

Data includes Study Permit Approvals & Renewals

Secondary or less	1,940	2,880
Post Secondary	6,155	8,760
Other Studies	340	455
Education level not stated	5	15
Saskatchewan Total	8,420	12,090
Secondary or less	7,225	11,860
Post Secondary	20,125	28,635
Other Studies	1,285	1,580
Education level not stated	5	20
Alberta Total	28,545	41,990
Secondary or less	24,095	27,710
Post Secondary	77,975	91,835
Other Studies	9,200	7,905
Education level not stated	35	45
British Columbia Total	110,370	126,825
Secondary or less	85	140
Post Secondary	75	110
Other Studies	--	5
Education level not stated	0	0
Yukon Total	165	255
Secondary or less	30	35
Post Secondary	10	10
Other Studies	0	--
Northwest Territories Total	35	50
Secondary or less	0	--
Post Secondary	--	5
Other Studies	0	0
Nunavut Total	--	10
Province/territory not stated	7,650	9,715
Total	548,720	685,280
Secondary or less	81,715	112,725
Post Secondary	428,475	528,825
Other Studies	42,010	45,685
Education level not stated	150	220
Total - All Canada	548,720	685,280

Study Permit Approvals & Renewals Combined

*510,136 Approved
**175,144 Renewed

*Source: IRCC Open Data

2024 Numbers Confirmed

Based on IRCC Dataset #2



Study Permit Data
Approvals & Renewals
Combined

*510,136 Approved

**174,249 Renewed

510,136 / 685,206
= 74.45%

This calculation estimates
that about **25.55%** of study
permits in this dataset are
likely **renewals**

	<u>Study Permits</u> <u>Approved</u> <u>Broken down</u> <u>by Province</u>	<u>Assuming 25.55% are</u> <u>renewals, Total SPs</u> <u>Approved equals:</u>
Newfoundland	4,140	3,086
PEI	3,080	2,296
Nova Scotia	16,050	11,964
New Brunswick	10,915	8,136
Quebec	77,960	58,111
Ontario	363,020	270,593
Manitoba	19,210	14,319
Saskatchewan	12,090	9,012
Alberta	41,990	31,299
British Columbia	126,825	94,535
Yukon	225	168
Northwest Territories	50	37
Nunavut	5	10
Province not stated	9,715	10
	685,280	510,136

2023 Study Permit
Approvals & Renewals Combined



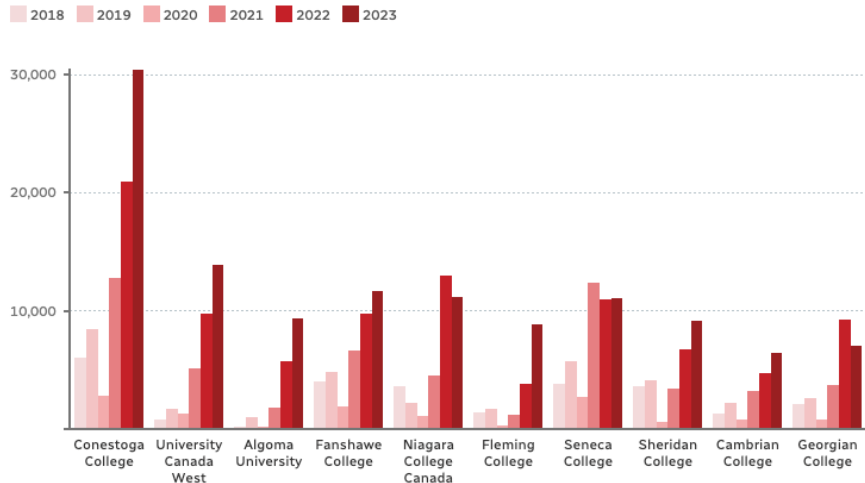
Popular study destinations

The Counter-Narrative

Are private institutions to blame?

Where Canada's big increases in international students can be found

Graph shows the number of study permit applications approved each year by Immigration, Refugees and Citizenship Canada for the 10 colleges and universities with the largest increases from 2018 to 2023.

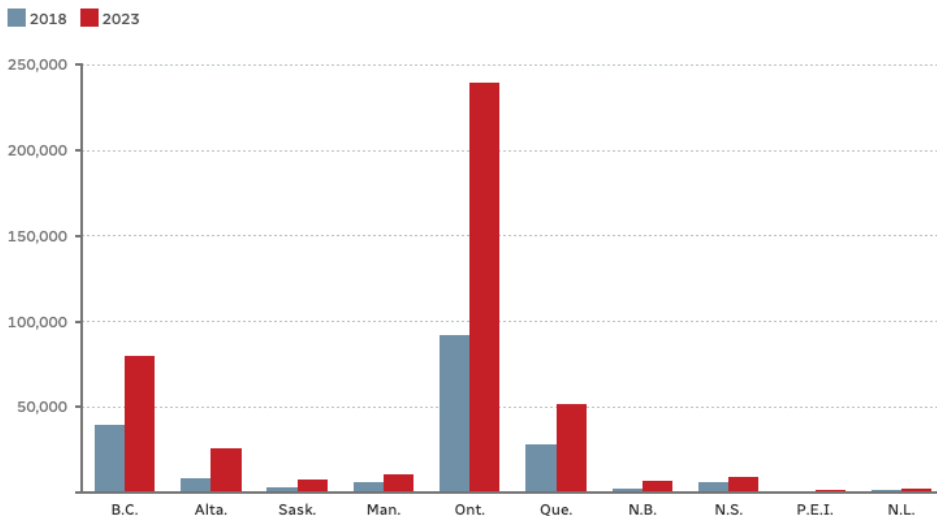


Figures for Ontario's colleges account for permits granted to students at all campuses of each college, including students enrolled in public college-private partnership programs.

Source: CBC's analysis of Immigration, Refugees and Citizenship Canada data tables (2018-2023) (CBC)

Study permits issued per province

Graph shows the number of study permits approved in 2018 and in 2023 by Immigration, Refugees and Citizenship Canada for international students to attend colleges or university in each province.



Source: CBC's analysis of Immigration, Refugees and Citizenship Canada data tables (CBC)



Popular study destinations

The counter-narrative

Major Issue: Massive Population Growth in Canada



International Students shouldn't be taking the blame.

Let's consider just Q3 of 2023:



Canada increased its population by 430,635 people (+1.1%)
Between July 1 to October 1, 2023.

This was the highest population growth rate in any quarter since the second quarter of 1957 (+1.2%), when Canada's population grew by 198,000 people.

Canada's total population growth for the first nine months of 2023 (+1,030,378 people) had already exceeded the total growth for any other full-year period since Confederation in 1867, including 2022, when there was a record growth.

Population growth rates in the third quarter of 2023 exceeded the national level (+1.1%) in Alberta (+1.3%), Prince Edward Island (+1.2%) and Ontario (+1.2%). The population grew in all provinces and territories, except in the Northwest Territories (-0.5%).

1. Recruitment expectations

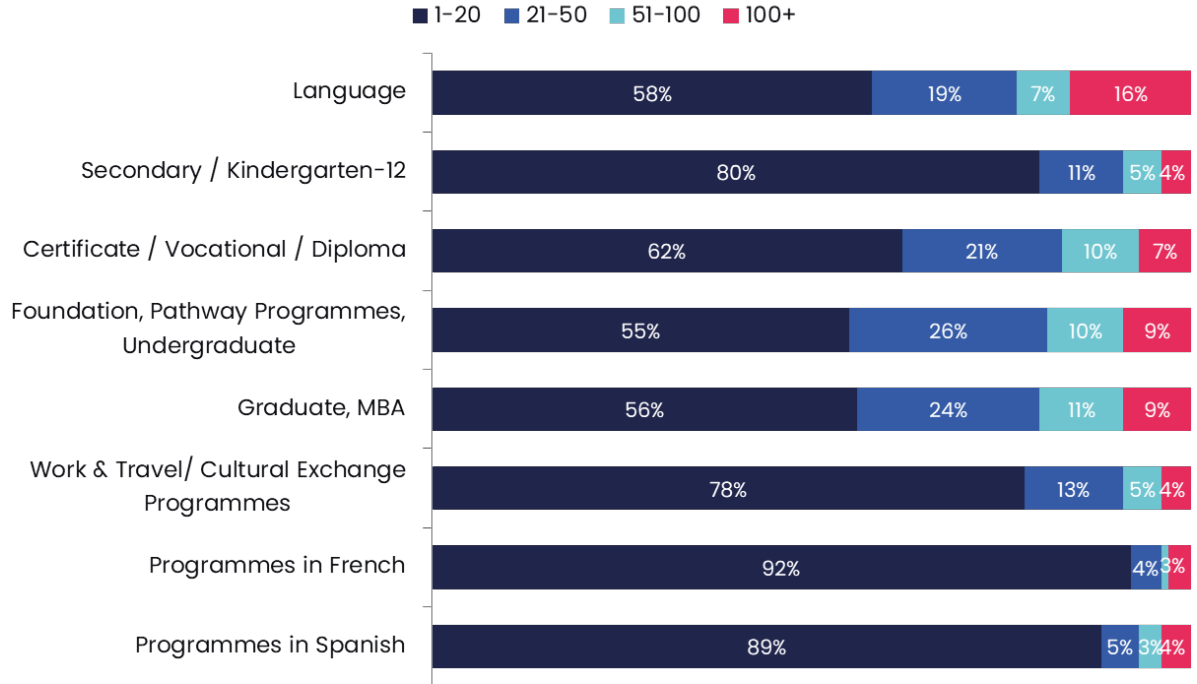




Student enrolments



How many students have you recruited **in the last 12 months** for the below programmes?



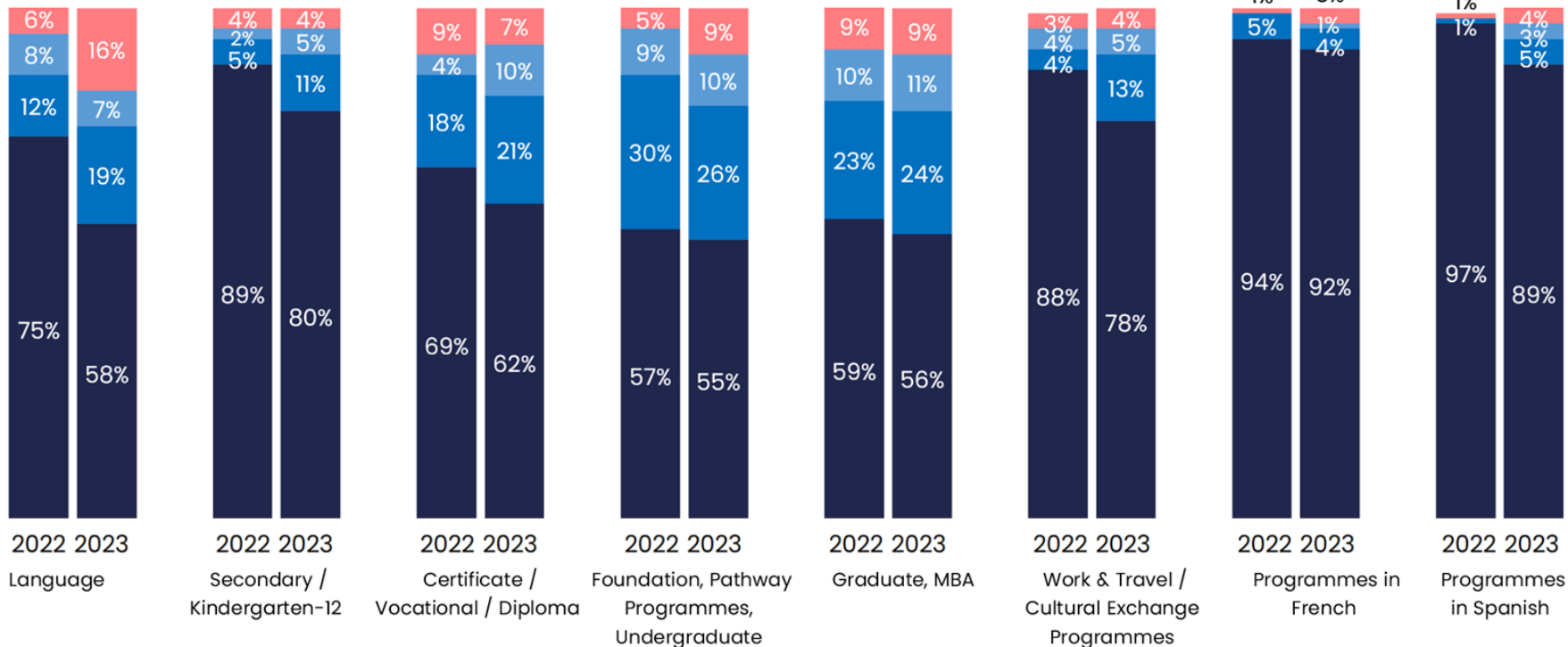
Student enrolment

2022 vs 2023



How many students have you recruited **in the last 12 months** for the below programmes?

■ 0-20 ■ 21-50 ■ 50-100 ■ 100+



Student enrolments

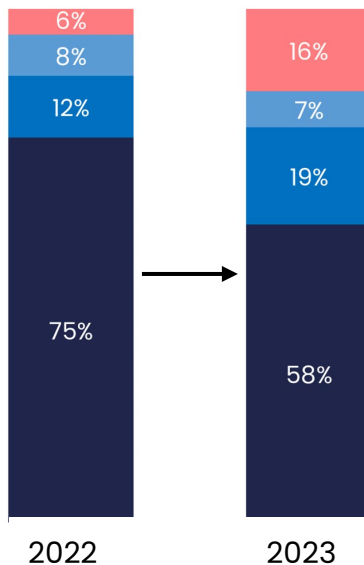
2022 vs 2023



How many students have you recruited in **the last 12 months** for the below programme?

Language

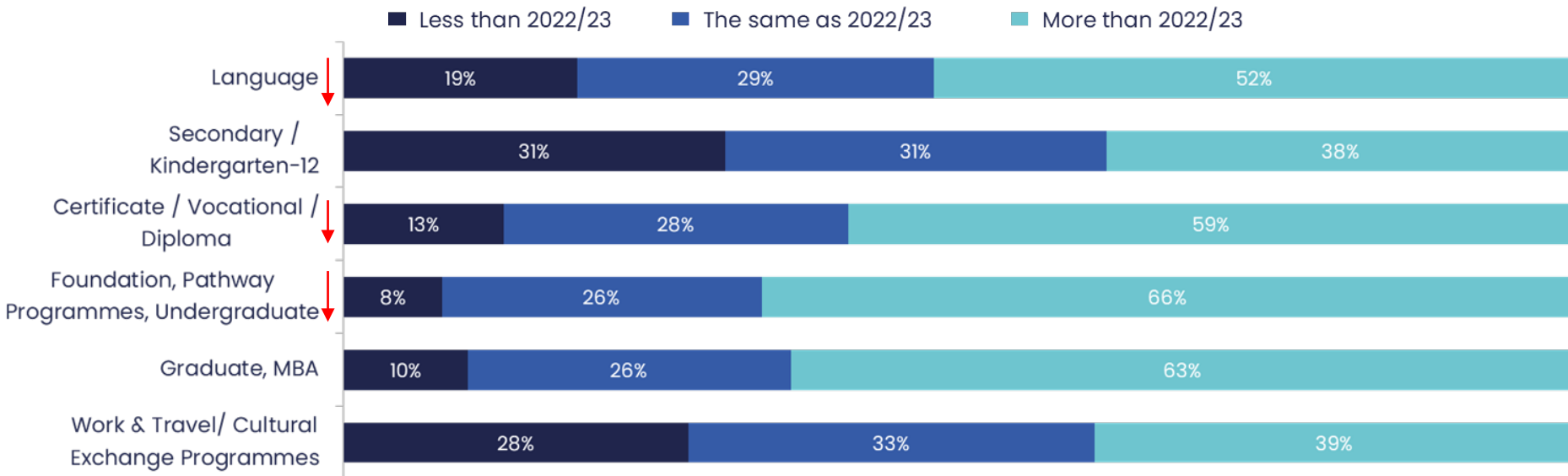
■ 0-20 ■ 21-50 ■ 50-100 ■ 100+



Enrolment expectation: Year on Year



What are your expectations for student enrolments for **2023/24** in comparison to **2022/23**?



**Likely to reduce given cap and no more spousal work permits*

2. Student decision-making factors

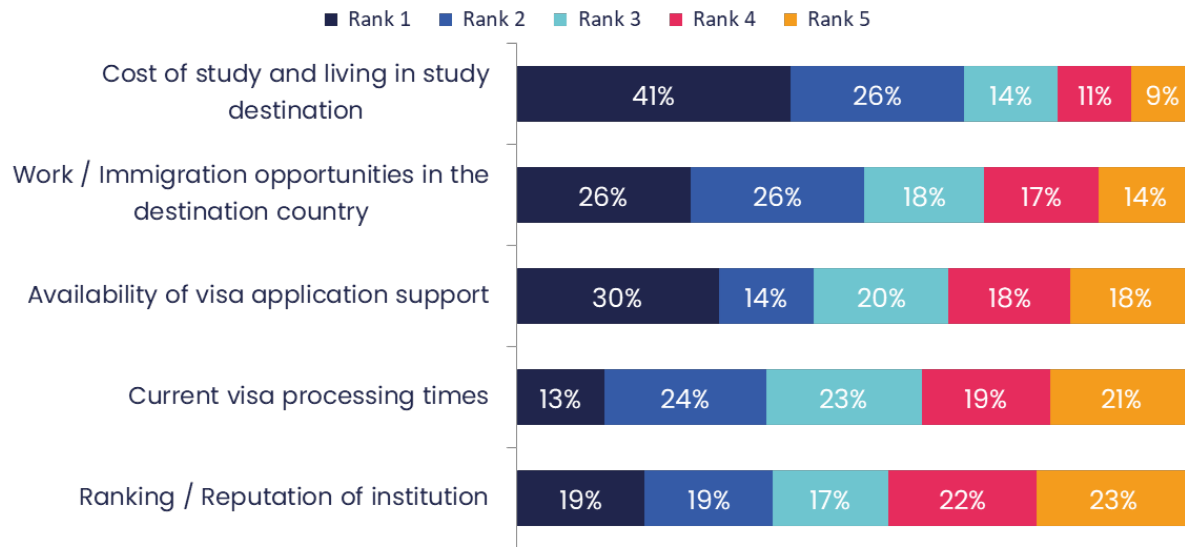




Top 5 crucial factors affecting student decisions



What **factors** do your students consider most crucial when making decisions about their study abroad plans?

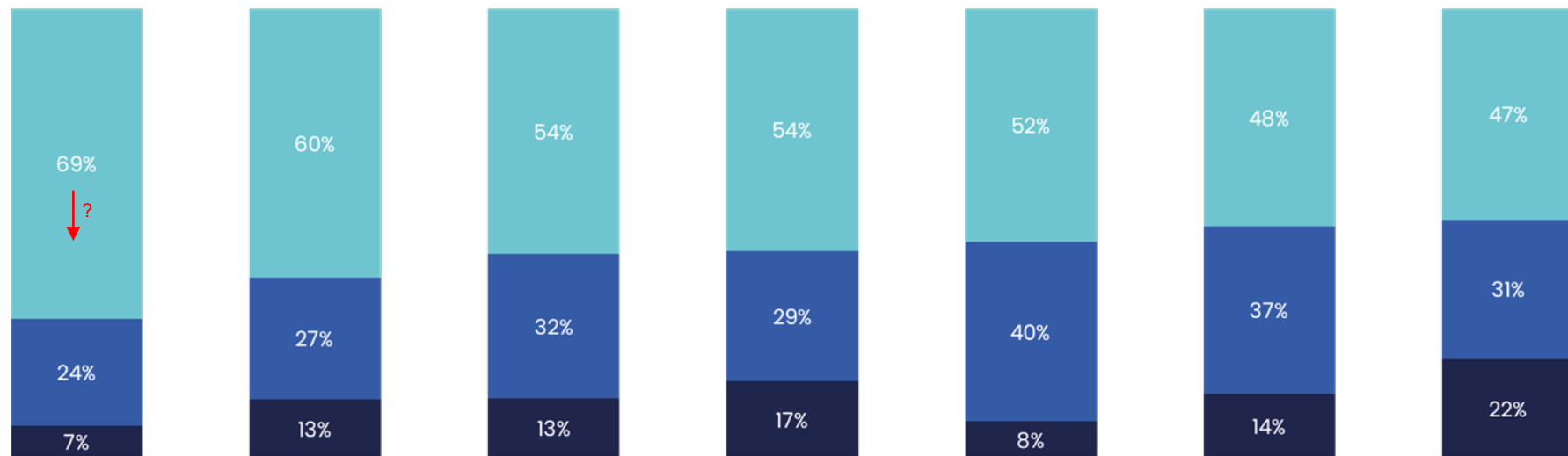


Student interest by country

Over **the last 2 years**, how has students' interest in the following study destination countries changed?



■ DECREASED interest in this market ■ MAINTAINED interest in this market ■ INCREASED interest in this market



*Likely to reduce due to IRCC Updates

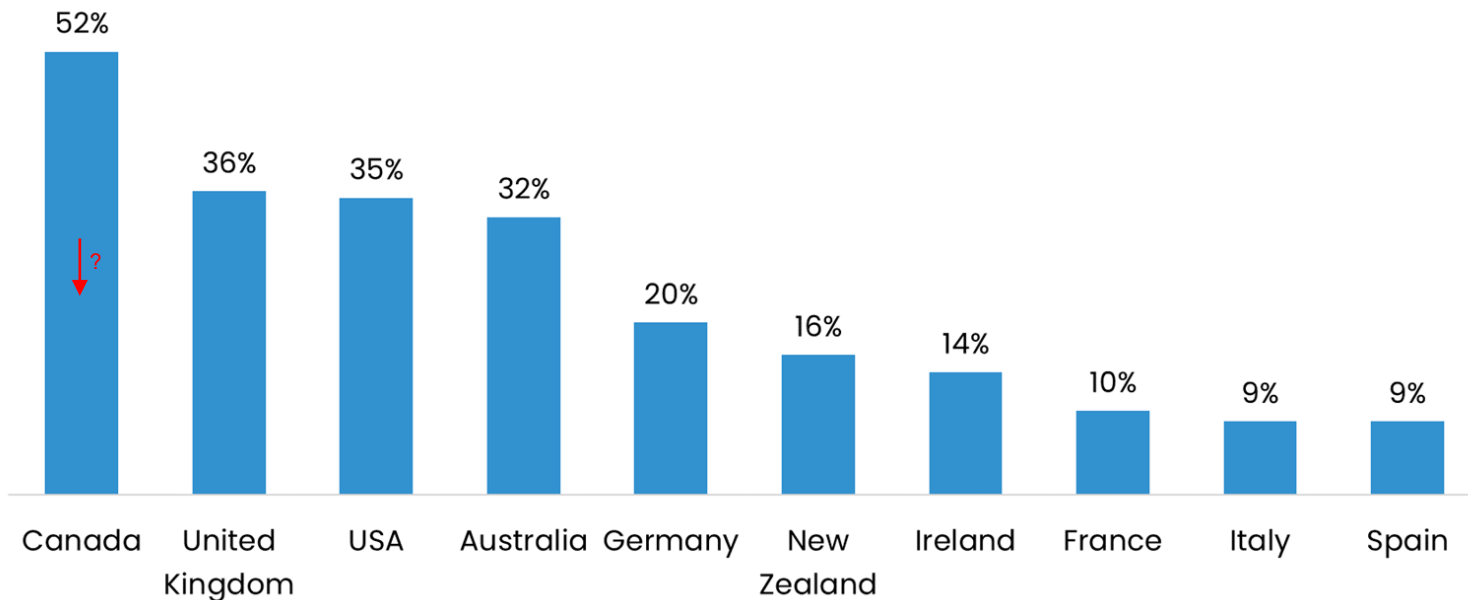
3. Employability



Top 10 countries to work during study



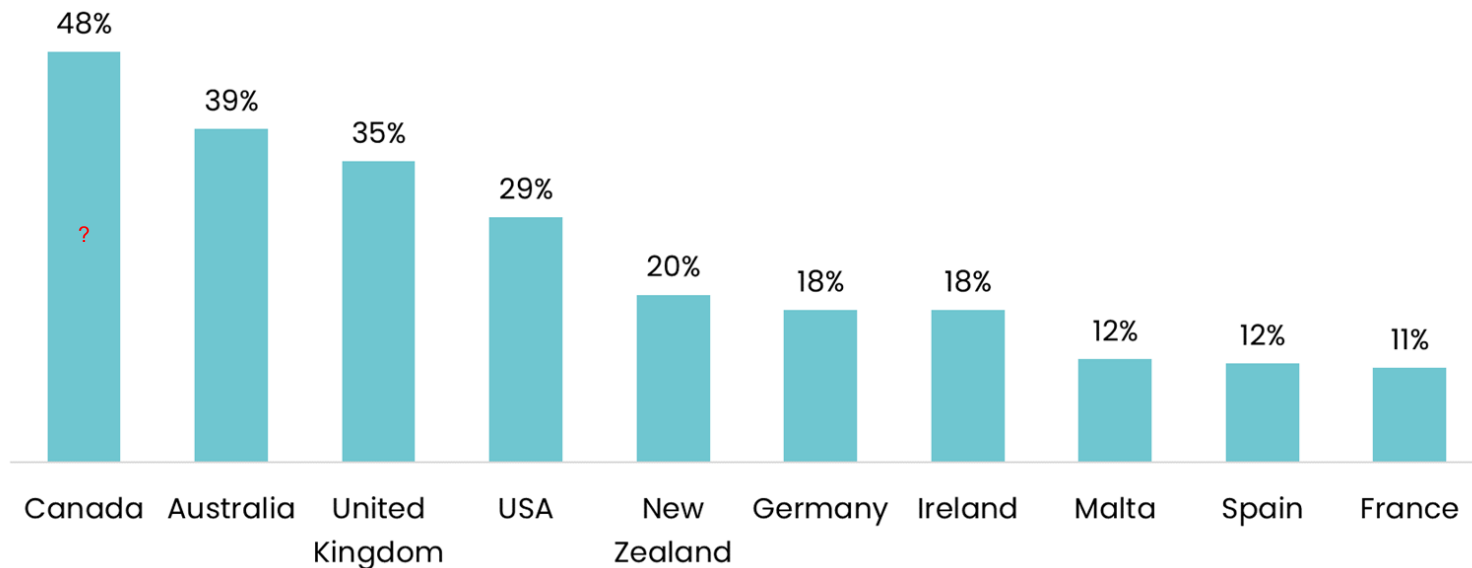
What are your students' preferred destinations when looking to work **during** their studies?



Top 10 countries to work **post-study**



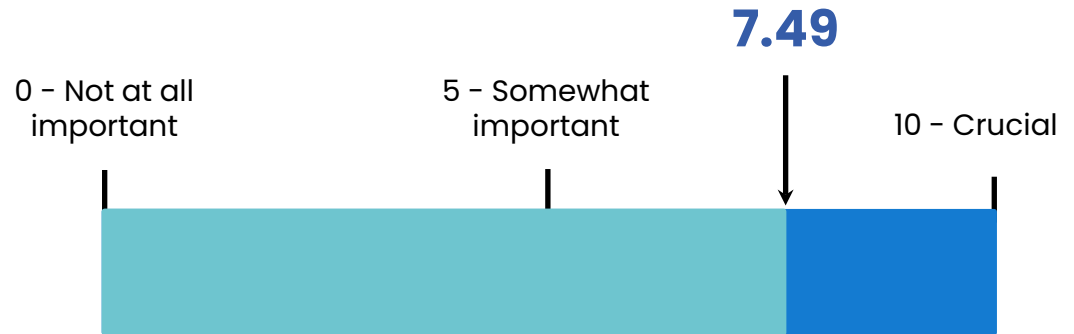
What are your students' preferred destinations when considering **post-study** work/career options?





Importance of student employment opportunities

How important are employment opportunities to your students when choosing **a study/career destination**?



4. Enrolment challenges

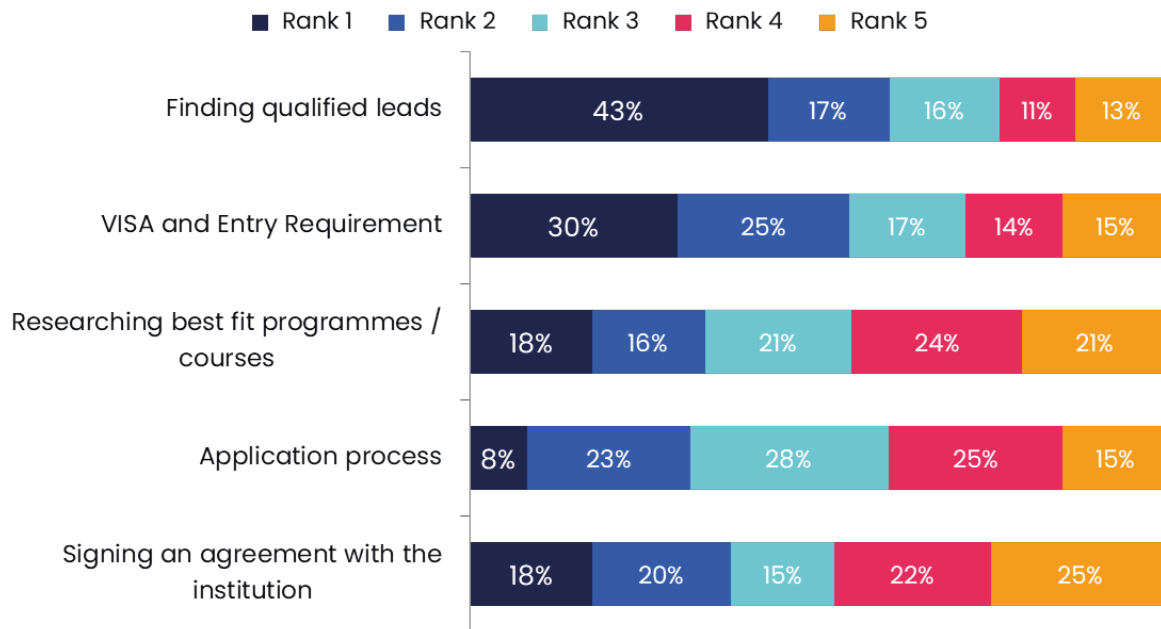




Top 5 enrolment challenges



What are **the most challenging aspects** of successfully enrolling students?

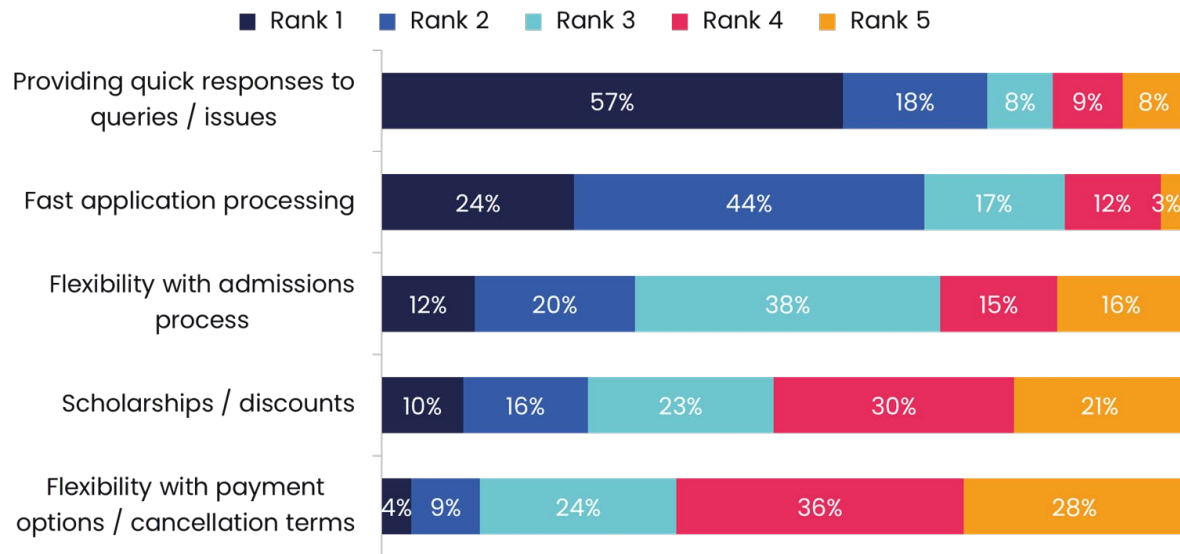




Top 5 valued partner support



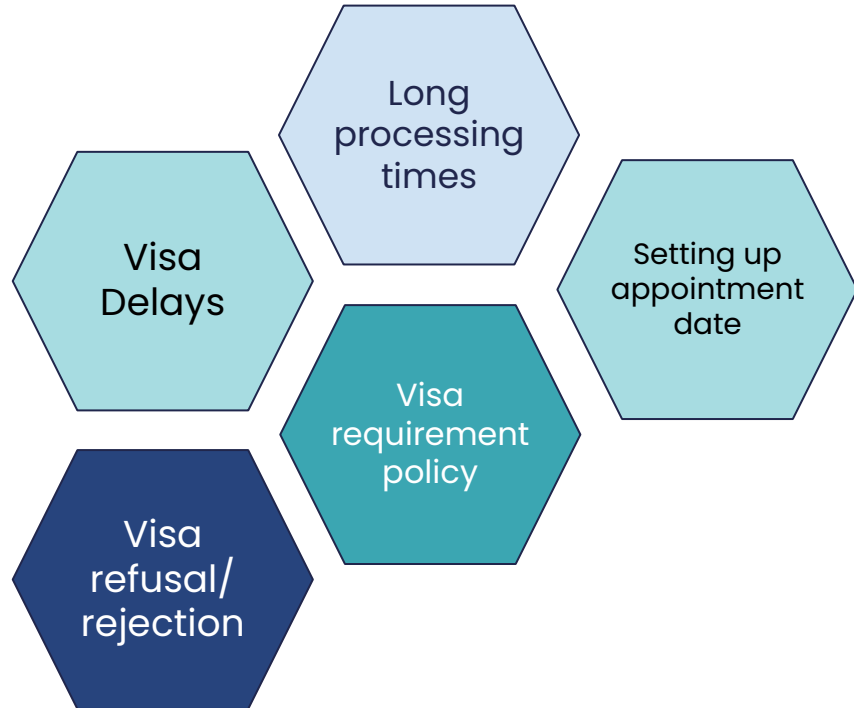
In which area do you most value **the support of your partner** schools when it comes to successfully enrolling students?





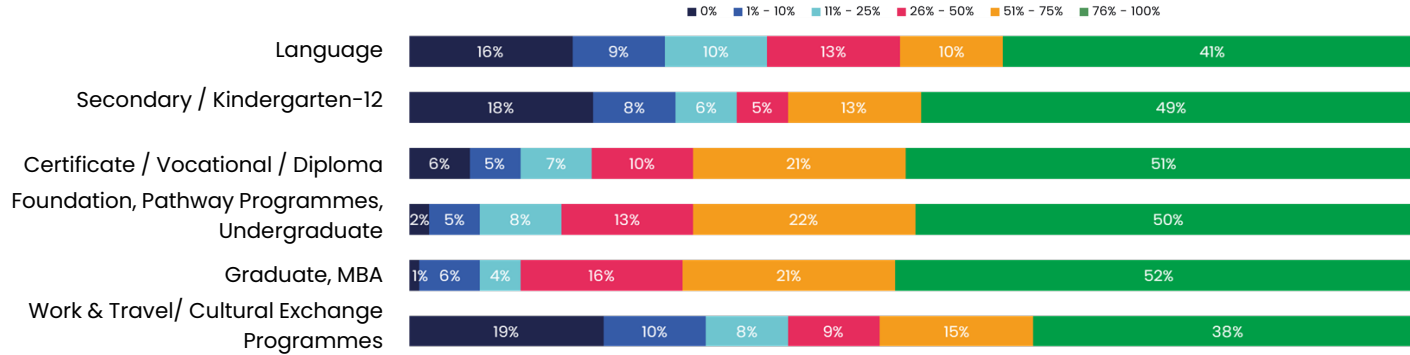
Top 5 challenges in visa processing and support

What challenges have you experienced in **visa processing and support**?

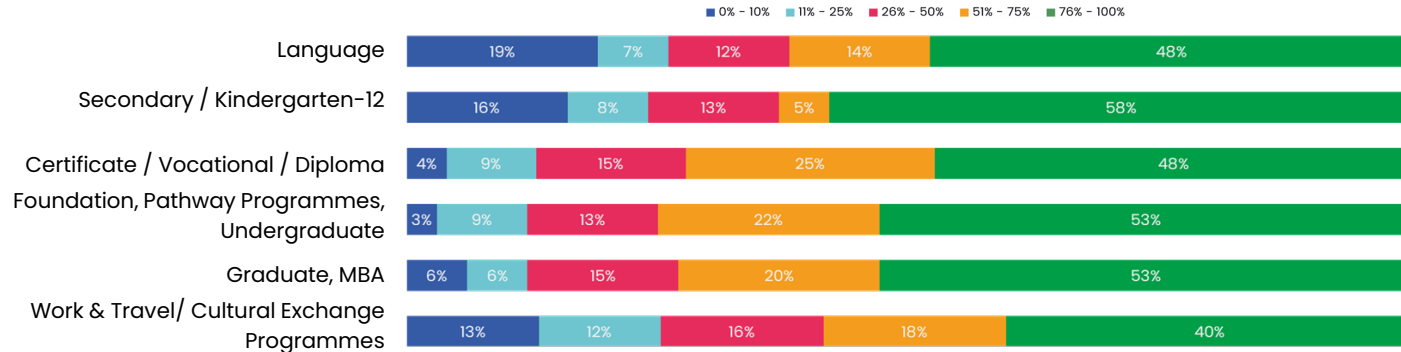


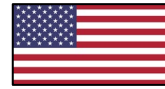


Visa approval: Approximately what percentage of student visa applications are approved?



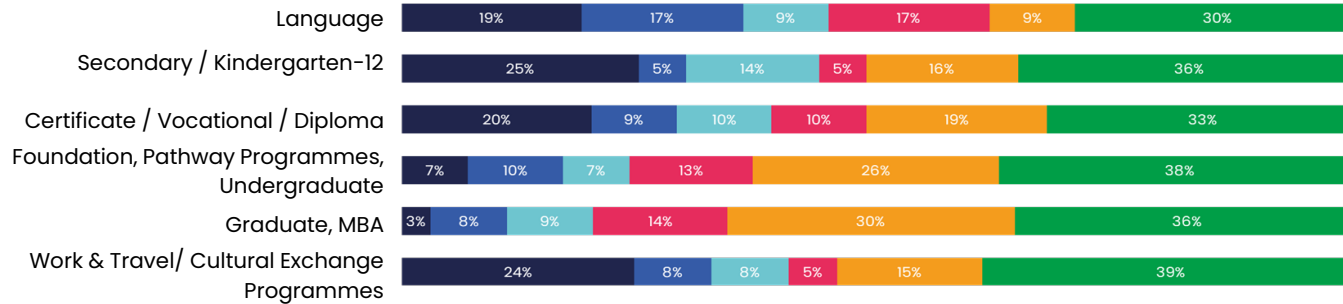
2022





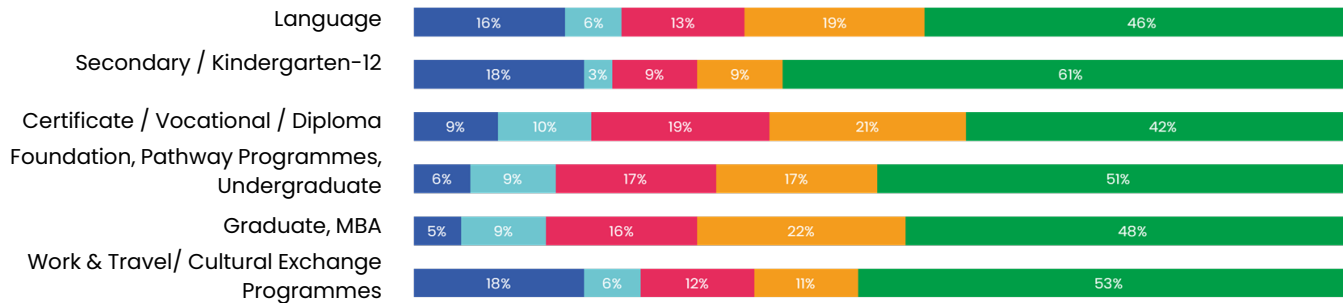
Visa approval: Approximately what percentage of student **visa applications** are approved?

0% 1% - 10% 11% - 25% 26% - 50% 51% - 75% 76% - 100%



2022

0% 1% - 10% 11% - 25% 26% - 50% 51% - 75% 76% - 100%



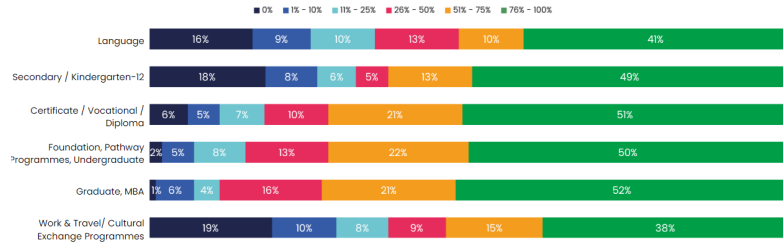
Visa approval rate by country – comparison 2023 data



Visa approval rate by country –Canada



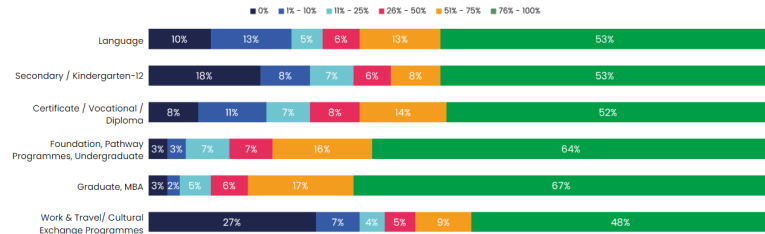
Approximately what percentage of student visa applications are approved?



Visa approval rate by country –United Kingdom



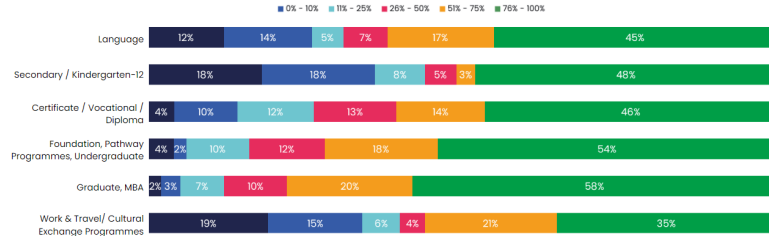
Approximately what percentage of student visa applications are approved?



Visa approval rate by country –Australia



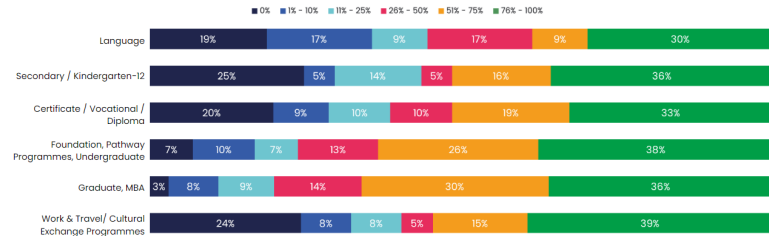
Approximately what percentage of student visa applications are approved?



Visa approval rate by country –USA



Approximately what percentage of student visa applications are approved?



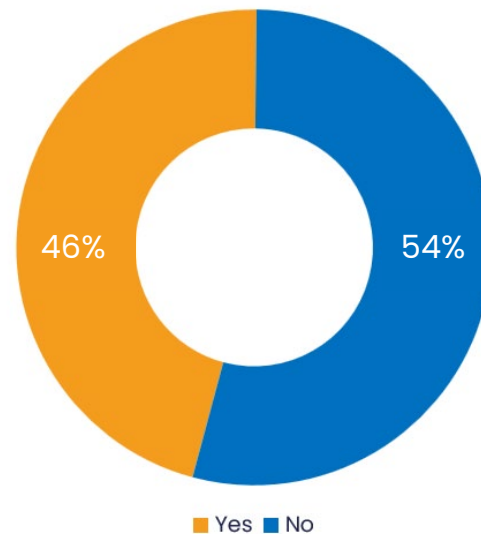
5. Online programmes





Online programmes

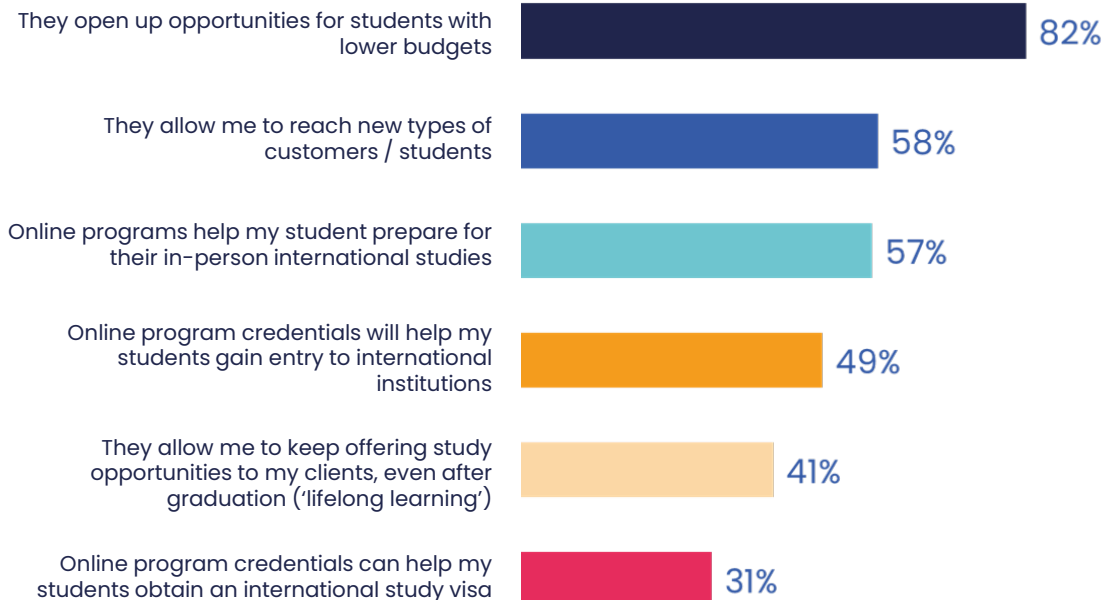
Are you currently selling or promoting **online education / online programmes?**





46%
promoting online
programmes

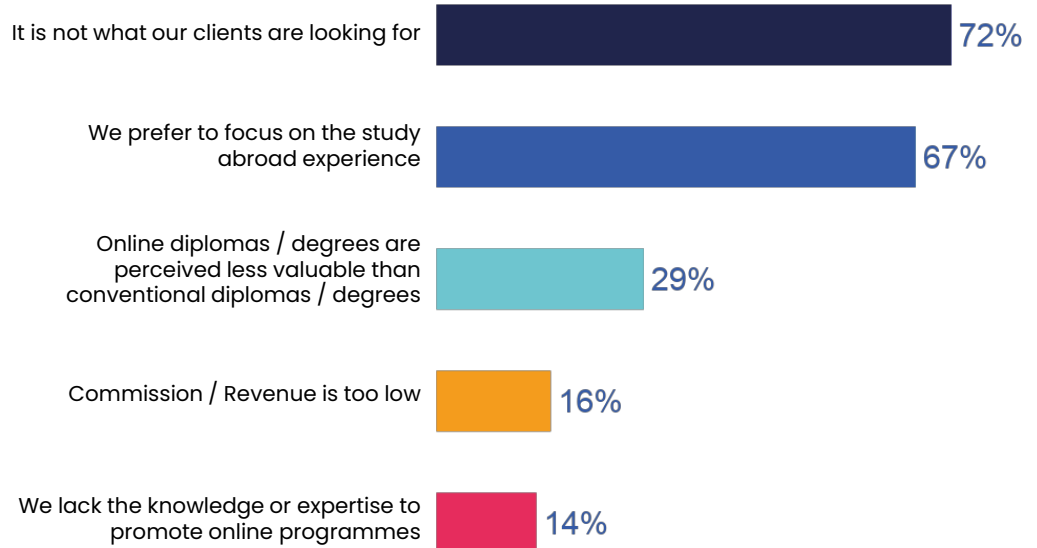
Why do you offer and promote online programmes?





54% not currently promoting online programmes

Why has your agency chosen **NOT** to sell or promote online education / online programmes?



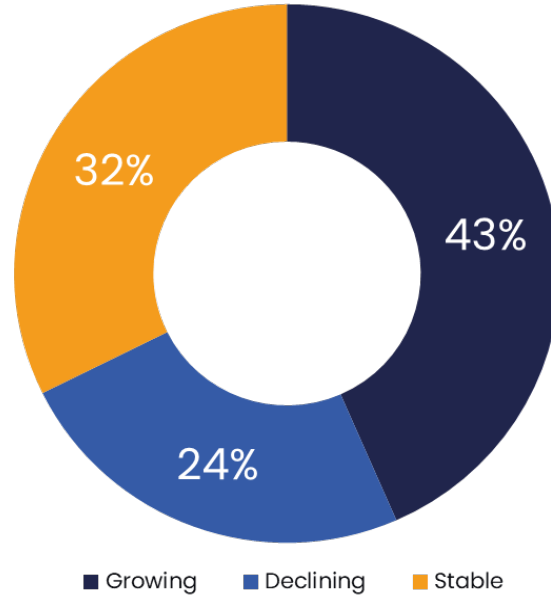


46% currently promoting online programmes

2023



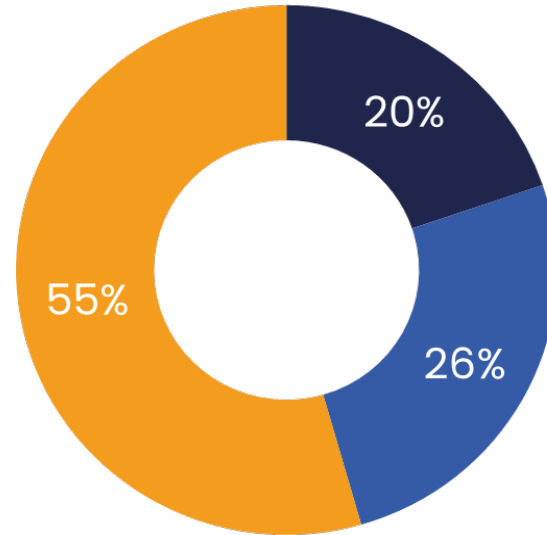
Is demand for online programs ...



2023



Are you considering the promotion of online programmes in the near future?

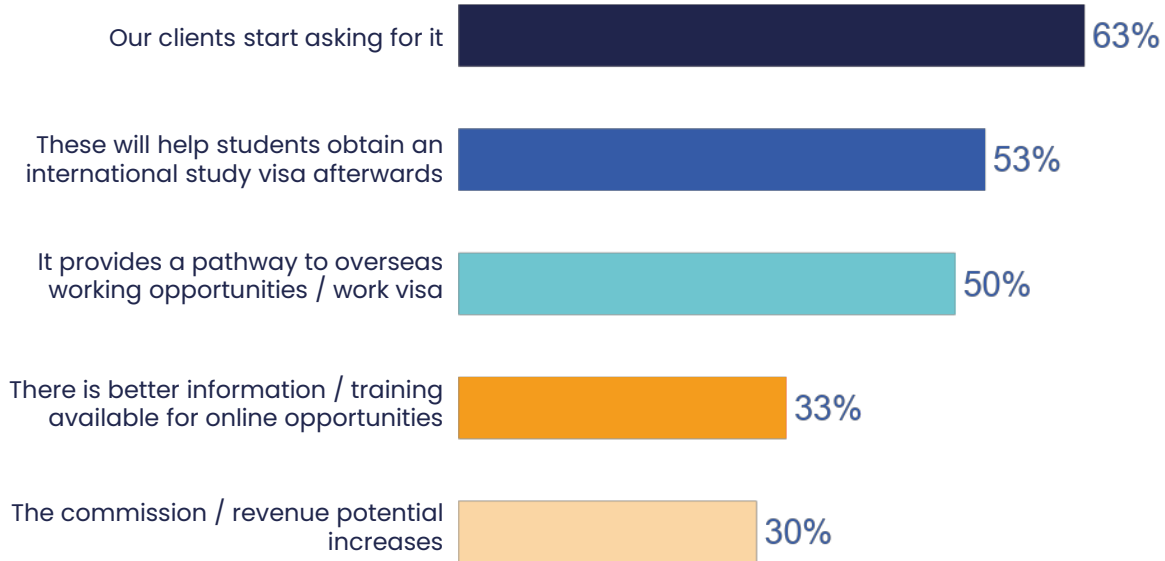


■ No ■ Yes, absolutely ■ Maybe, if...



54% not currently promoting online programmes

55% may consider promoting online programmes if...



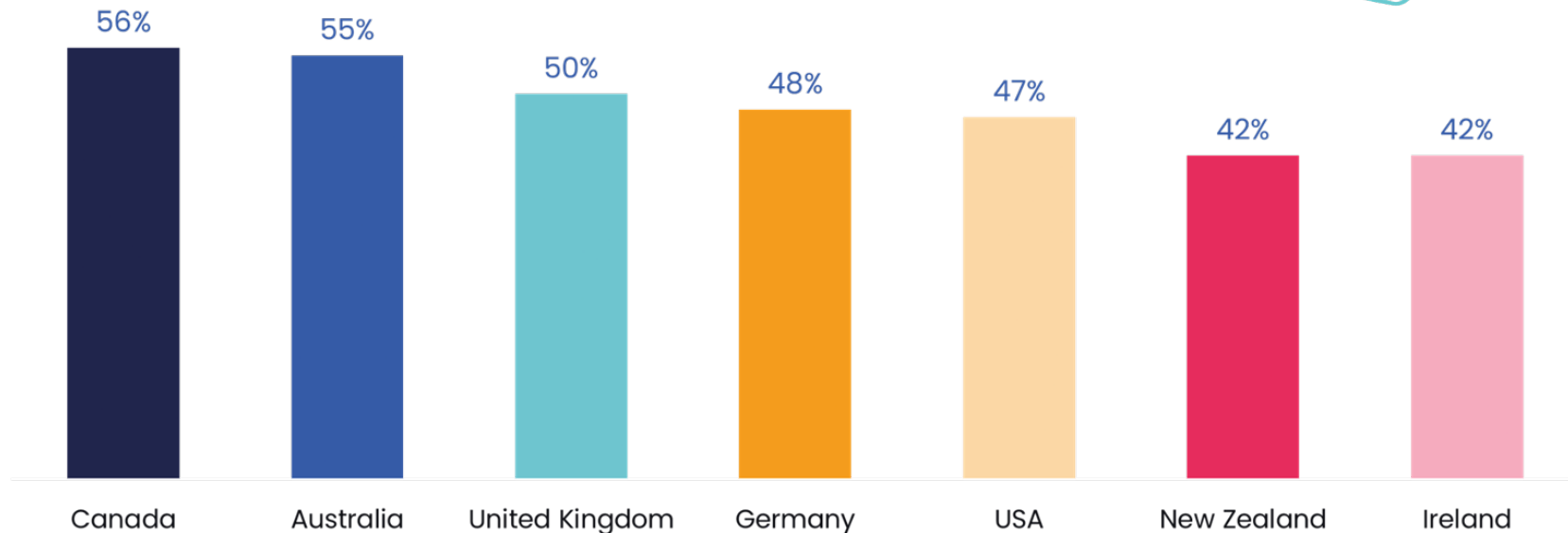
6. Agency operations



63% of agents have started placing students into **new destination countries** in the past 2 years

Top 7
most popular

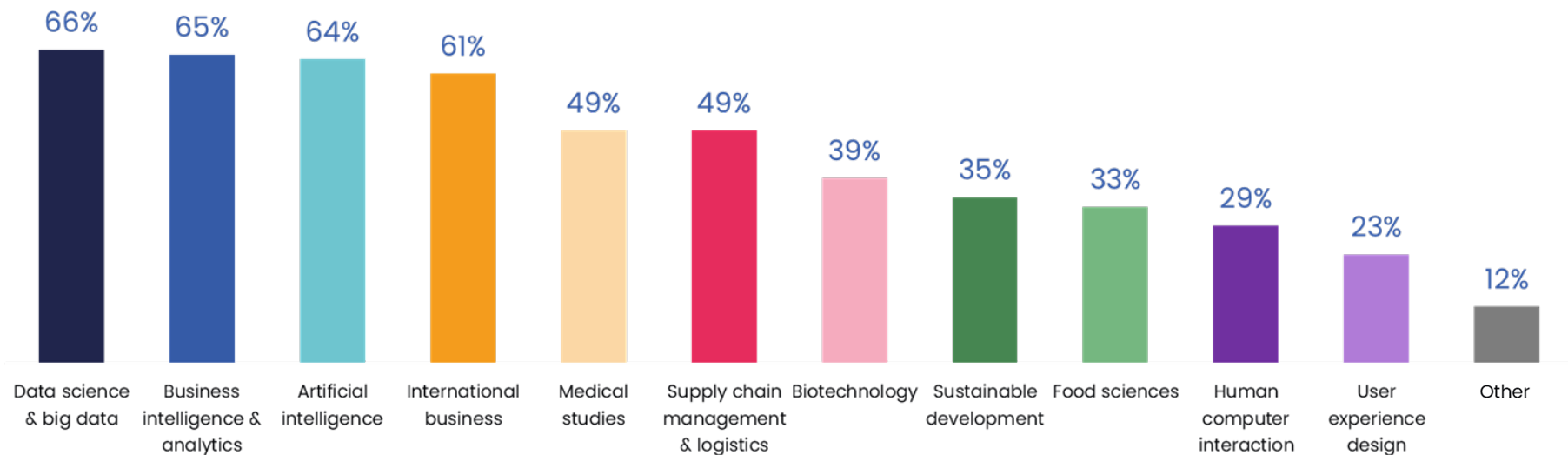
What **new study destinations** are your students seeking?



60% of agents have started placing students into new fields of study



What new **fields of study** are your students seeking?

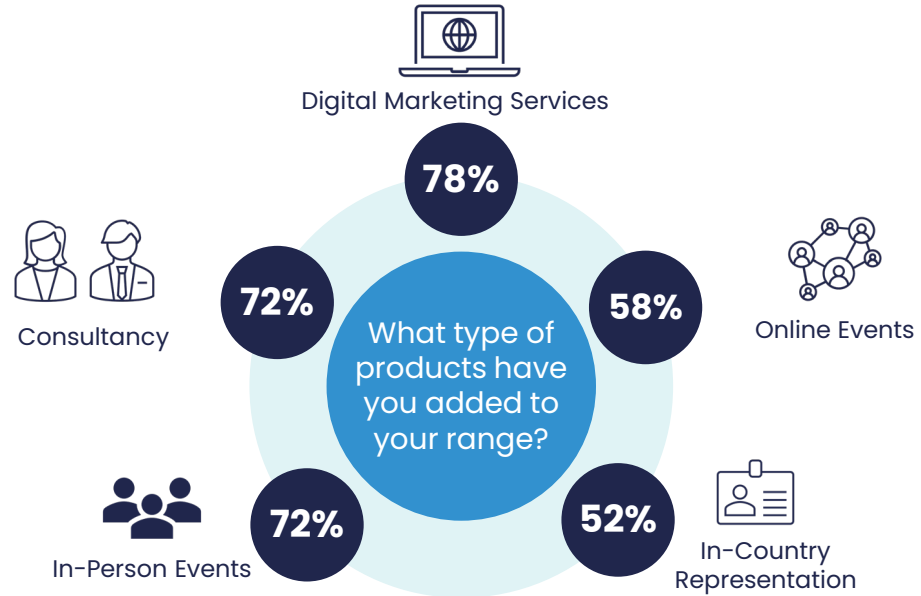




45% of agents increased their range of products and services offered to educator partners



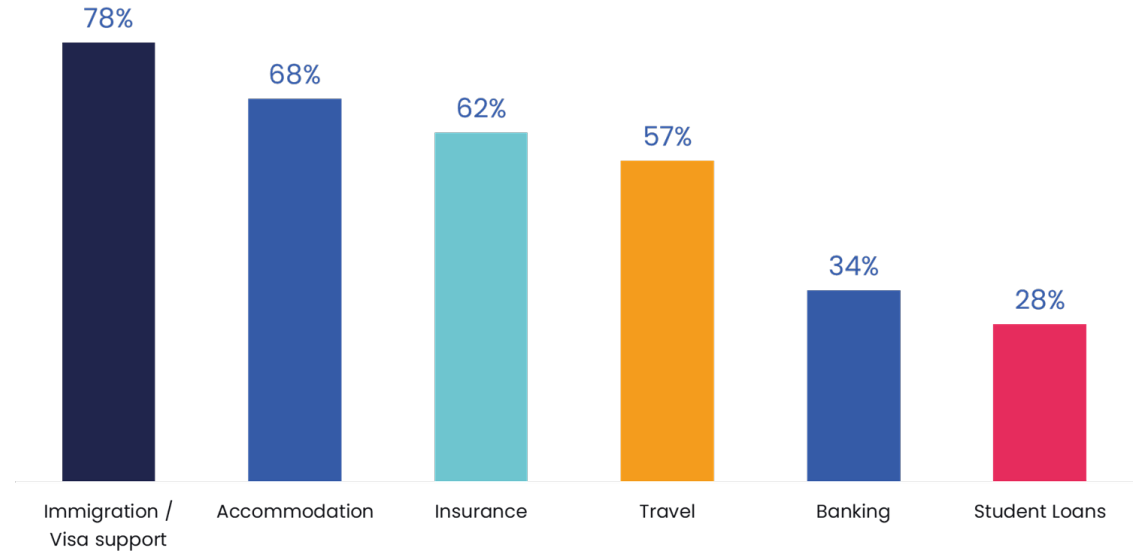
What **type of products** have you added to your range?





64% of agents increased their range of products and services offered to students

What type of new products have you begun **offering to your students?**

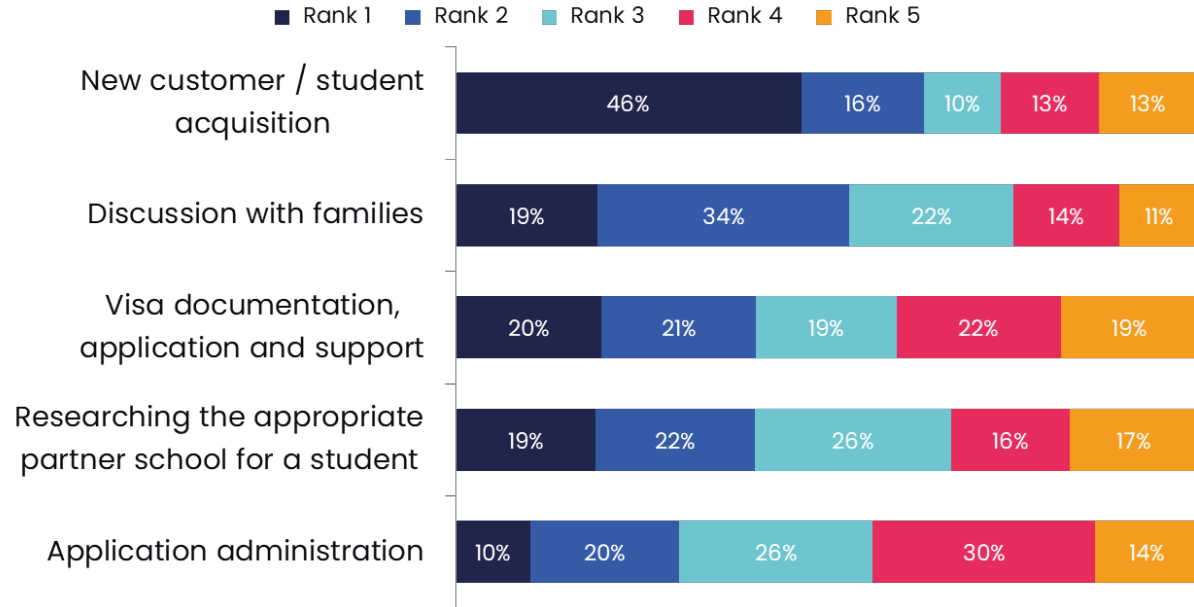




Top 5 most time consuming processes



During the recruitment process, where is the **majority of your time spent** on assisting a student?





AI powered solutions

What is your view on **Artificial Intelligence** powered solutions in international student recruitment?

I'm not sure what to think of the impact of AI on our industry yet



AI powered solutions will help us increase efficiency when counselling students



I'm concerned about the impact of AI on my job and/or organisation

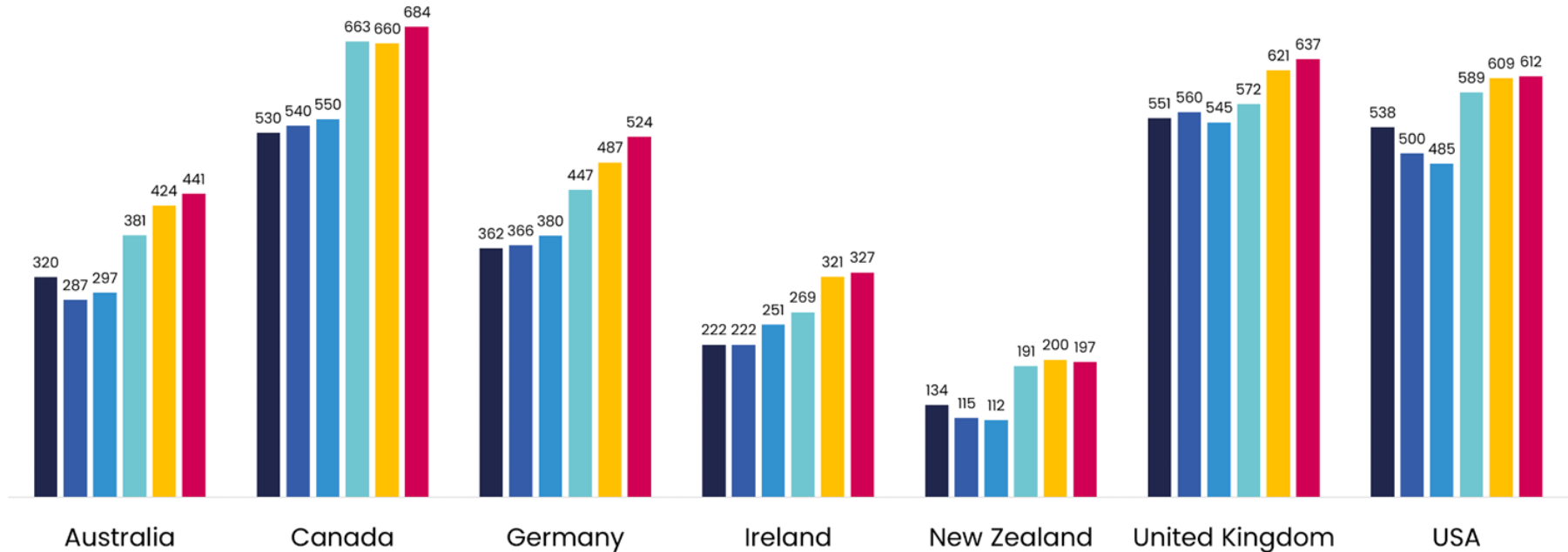


Agent data from ICEF Berlin eSchedules 2017-2023

Countries agents are looking for partners in



■ 2017 ■ 2018 ■ 2019 ■ 2021 ■ 2022 ■ 2023



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