Country Briefing: The University of Melbourne and Canada

Krista Northup, Regional Manager (North America)
• Provincial responsibility
  – Federal government transfers funding to Provinces
  – No Federal Department of Education
• 93 Universities and 175 Colleges
• Post-secondary policies and administrative procedures differ across the nation
• Almost 50% of adults have completed post-secondary studies
• One of the highest post-secondary rates in the world for 18-21 year olds and 22-25 year olds
• 815,000 full-time, post-secondary students
  – 700,000 UG, 115,000 PG, 265,000 Part-time
Canadian Education System

- Number of enrolments mirrors population distribution
  - Ontario = 360,000 full time
  - Quebec = 170,000 full time
  - British Columbia = 90,000 full time
  - Alberta = 70,000 full time

- Full time enrolments grew 31% between 2000 and 2006
  - Between 2006-2016 expected growth approx 9-18%
  - Will not be consistent by Province or institution
  - If population stays constant, enrolments would increase by 16%
• Students are mobile within Canada
  – Will travel across the Province
    • Ontario only has three universities in the largest city compared to Sydney, Melbourne, Brisbane which have 5-7
    • Regional universities popular
  – Quite likely to travel across the country
    • Large population of Ontario students study in Nova Scotia and B.C.
    • Large population of Vancouverites study at McGill and UoT
  – Very unlikely to do first UG degree overseas
  – Many, however, will go to US for Ivy League or sports scholarships
Type of Market

- Professional schools in demand
  - Medicine, Dentistry, Optometry, Physio, Law, Teacher Ed.

Postgraduate Programs

- Many Canadian students will move on to some form of postgraduate study
  - Some did not gain admission into professional school
  - Lack of job opportunities with only an undergrad degree

Undergraduate

- Low demand for overseas opportunities – not in social makeup

Study Abroad

- Students interested, but too expensive
- Trend: complete first degree and then study overseas
## Canadian Student Market

Do they need to study overseas?

<table>
<thead>
<tr>
<th><strong>NO</strong></th>
<th><strong>YES</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>High Quality education system within Canada</td>
<td>Oversupply of student applicants for lack of places</td>
</tr>
<tr>
<td>No real incentive to travel overseas</td>
<td>• Caused by underfunding of education</td>
</tr>
<tr>
<td>Not in social make-up to travel for UG studies</td>
<td>• Provincially-mandated post-secondary education</td>
</tr>
<tr>
<td></td>
<td>- Restrictions placed on out-of-province students</td>
</tr>
<tr>
<td></td>
<td>• High demand for professional programs</td>
</tr>
</tbody>
</table>
Canadian Student Market

Top Destinations for Canadians Studying Abroad

1. US – 29,203
2. UK – 4,640
3. Australia – 3,789
4. France – 1,293
5. Germany – 641
• According to AEI, Overall Canadian enrolments are down in August 2010 by 1.4% and commencements are down 11.0%
  - Teacher education commencements are down 21.6% in August 2010
  - Health commencements are down 6.6% in August 2010

• Message from AEI: It is important to diversify the fields of study that Canadians are undertaking in Australia so we don’t replace one concentration with another
Canadian Undergraduate Enrolments:
August 2007 - August 2010

Source: AEI, Aug 2010
Canadian Postgraduate by Coursework Enrolments:
August 2007 - August 2010

- 6.6% in 2007
- 2.4% in 2008
- 10.5% in 2009
- 6.8% in 2010

Source: AEI, Aug 2010
Canada – Top fields of study (undergrad)

<table>
<thead>
<tr>
<th>Field</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>32%</td>
</tr>
<tr>
<td>Management and Commerce</td>
<td>15%</td>
</tr>
<tr>
<td>Society and Culture</td>
<td>13%</td>
</tr>
<tr>
<td>Dual Qualification</td>
<td>8%</td>
</tr>
<tr>
<td>Education</td>
<td>9%</td>
</tr>
<tr>
<td>Creative Arts</td>
<td>7%</td>
</tr>
<tr>
<td>Natural and Physical Sciences</td>
<td>3%</td>
</tr>
<tr>
<td>Engineering and Related Technologies</td>
<td>3%</td>
</tr>
<tr>
<td>Information Technology</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: AEI, Aug 2010
Canada – Top fields of study (postgrad)

- Education: 46%
- Society and Culture: 10%
- Health: 9%
- Management and Commerce: 9%
- Creative Arts: 4%
- Natural and Physical Sciences: 4%
- Agriculture, Environmental and Related Studies: 3%
- Engineering and Related Technologies: 2%
- Dual Qualification: 9%

Source: AEI, Aug 2010
UoM – UG student performance

Source: UoM, June 2010
UoM – PG CW student performance

Source: UoM, June 2010
Australian Competition in Canada

• Group of 8 – Targeting Professional School Areas
  – University of Queensland, University of Sydney
• Postgraduate coursework and research
  – In specialized areas
  – Students attracted to research output and reputation
• Other niche-areas
  – Cost competitive professional programs – law, teacher ed.
  – Unique location or program focus
    • Griffith
    • Charles Sturt
    • Bond
  – College articulation
Overall Recruitment Issues

- Current Economic Climate
  - Canadian Students are Loan Dependent
- Rising tuition
- Expectations that high tuition fees equate to extraordinary quality of education and facilities
- “Last Chance U” Stigma
- Return to work in Canada/ accreditation
Strategic Approach to the Market

• To focus on three provinces with the highest return on investment: Ontario, British Columbia, and Quebec.

• To have a long-term focus on increasing the university profile, educating the market about program changes, and diversification in program areas leading to strong 2011 & 2012 commencements.

• To increase our presence in market to support above objective – effort needs to include both marketing and academic staff.
Strategic Approach to the Market

• To establish and foster links with Canadian professional associations as well as to use internal knowledge of skills shortages, migration policy, and transferability of degrees to inform UoM staff and to educate students, parents, and advisors.

• To continue to foster our representative relationships in country.

• To utilize web and print opportunities to grow brand awareness in Canada.

• To document and address admissions related questions and issues.
• First activities commenced in 2002 – little to no market involvement before this
• All of University approach initially followed by several varied approaches by faculties
• Alumni events have resulted in mixed results
  – 836 registered in database
• Since 2006, profile has largely been driven by MDHS
  – Interview program spearheaded by Prof. Hawthorne
• Office established in Feb 2008 – streamlined communication
• Office of Admission commitment to market – further strategy development with faculties and IR, MGM, Alumni
Bringing strategy to practice: Future Activities

• Attendance at key recruitment fairs
  – OzTREKK circuit, Study and Go Abroad Fairs, Recruit in Canada, Austrade
• Academic visits to hold seminars and interview programs
• Select advertising – print and web
• 1-2 pagers on accreditation issues/ bringing professional degrees back to Canada
• Webinars
• Facebook Campaigns
• Targeted activity to increase DVM interest
• Combination of Facebook advertising and webinar technology
• Successful due to high level support from the Dean
• Australearn supported
• Focused on 10 universities
• October results yielded 11

<table>
<thead>
<tr>
<th>University</th>
<th>Click Throughs</th>
<th>Student Sign up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alberta</td>
<td>54</td>
<td>0</td>
</tr>
<tr>
<td>British Columbia</td>
<td>56</td>
<td>1</td>
</tr>
<tr>
<td>Calgary</td>
<td>55</td>
<td>0</td>
</tr>
<tr>
<td>Dalhousie</td>
<td>55</td>
<td>1</td>
</tr>
<tr>
<td>Guelph</td>
<td>85</td>
<td>3</td>
</tr>
<tr>
<td>McGill</td>
<td>58</td>
<td>3</td>
</tr>
<tr>
<td>McMaster</td>
<td>64</td>
<td>2</td>
</tr>
<tr>
<td>Toronto</td>
<td>57</td>
<td>0</td>
</tr>
<tr>
<td>Waterloo</td>
<td>42</td>
<td>0</td>
</tr>
<tr>
<td>Western Ontario</td>
<td>64</td>
<td>1</td>
</tr>
<tr>
<td>Totals/Averages</td>
<td>590</td>
<td>11</td>
</tr>
</tbody>
</table>
Engagement with Canada

• September 2010 Mission
  – McGill, UoT, University of Ottawa, UBC

• CBIE Conference
  – Relationship with Latin America (Brazil)
  – Navitas – SFU
  – Canada as a competitor and use of agents
  – CIC proposal re: registry of universities (like CRICOS)

• Networks
  – Austrade, Provincial Governments, Accreditation bodies
Marketing of Canadian Education

Why Study in Canada

Academic credentials valued world over, an education and cultural experience to prepare you for life and a diverse, welcoming and vibrant society are just few of the reasons...

WHY STUDY IN CANADA

Reasons to Choose Canada
» Internationally Recognized Education
» Competitively Priced
» One of the Best Places in the World to Live
» A Bilingual Nation
» Multicultural and Welcoming
» A Safe Place to Study
» Work Opportunities
Partner Institutions in Canada

The University of Melbourne has formal bilateral relations with the following institutions in Canada at University level:

- McGill University (U21)
- Queen’s University
- University of British Columbia (U21 & APRU)
- University of Toronto

At Faculty level, the following bilateral agreement is in place:

- University of New Brunswick (Engineering - Geomatics)
- Emily Carr University of Art and Design (VCA & Music)

U21 Canadian exchange agreements are amongst the University’s most active.
Leveraging Partnerships

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Further Questions?

North America Office Contact Details:

Krista Northup
Regional Manager, North America
knorthup@unimelb.edu.au

Melissa Chapman
Country Officer, North America
mcha@unimelb.edu.au