
***THE REPORT ON
INTERNATIONAL
STUDENTS IN MANITOBA
2004/05***

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Section I

INTRODUCTION

During the 2004-2005 academic year, over 5,900 international students came to Manitoba to pursue academic studies. The estimated total of tuition and academic fees paid by these students exceeded \$22M. If the non-academic spending of these students is included, their total economic impact surpassed \$54M. Furthermore, Manitoba's educational institutions indicated they could accommodate nearly 14% more international students than actually enrolled. The Government of Manitoba is committed to working with our partners in the educational community to fully develop this opportunity and realize significant educational, socio-cultural and economic benefits.

International students contribute to our province in many ways, bringing diverse perspectives to Manitoba's classrooms and communities. Through interaction with international students, Manitobans increase their cross cultural understanding and global awareness- increasing their intercultural competencies and preparing them for participation in the global economy.

Increased engagement and experiences with international students also enhances Manitoba's profile and opens doors for future trade and inward investment. When international students return home, they help raise Manitoba's profile abroad and become 'unofficial' ambassadors of Canada. Upon completion of their studies, some international students choose to remain in Manitoba and contribute their much needed skills and talents to the workforce.

International students can be found in Manitoba's elementary and secondary schools, post-secondary institutions and English as a Second Language programs. This report looks at the numbers of international students in these three sectors in during 2004/05, their areas of study, countries of origin, and lengths of stay. It also examines the capacity of educational institutions to admit more international students and the economic impact of international students on the province.

The survey of the international activities was widely circulated to Manitoba's educational institutions, who were asked to provide information voluntarily. Some institutions provided partial data and others indicated certain portions of the survey were not applicable to their international activities. Where no data was provided, the institution was excluded from the corresponding tables and charts.

This report complies with the legal requirements set out by the Freedom of Information and Protection of Privacy Act. This report has been compiled with the assistance of the Manitoba Bureau of Statistics.

Table A. Total International Student Enrolment by Sector						
	Elementary & Secondary Schools		Post-Secondary Education		ESL Schools	Total Enrolment
	Exchange Students	Regular Students	College Students	University Students	ESL Students ⁽¹⁾	
Total International Students	196	838	232	3,100	1,548	5,914
Percent Share of Total	3.3%	14.2%	3.9%	52.4%	26.2%	100.0%

(1) Some portion of ESL Students are captured under the Post-Secondary heading due to how information has been provided.

Table B. International Student Enrolment Targets by Sector						
	Elementary & Secondary Schools		Post-Secondary Education		ESL Schools	Total Enrolment
	Exchange Students ⁽¹⁾	Regular Students	Colleges Students	University Students	ESL Students	
Reported Enrolment ⁽²⁾	n/a	701	52	3,100	1,548	5,401
Target Enrolment	n/a	537	55	3,592	1,949	6,133
% of Target Achieved		130.5%	94.5%	86.3%	79.4%	88.1%

(1) Exchange Students are out of scope for the question of international student enrolment targets.

(2) Reported Enrolment is presented as a comparison to International Student Enrolment Targets. Institutions that have not provided Target Enrolment are excluded from this comparison, hence the apparent differences between Reported Enrolment and Total International Students presented in Table A.

Table C. Total Estimated Manitoba Based Expenditures				
\$ MILLIONS	Elementary & Secondary	Post-Secondary Education	ESL Schools	Total Enrolment
Student Living Expenditures ⁽¹⁾	\$4.64	\$22.26	\$4.63	\$31.53
Tuition & Educational Fees Paid ⁽²⁾	\$4.45	\$13.57	\$4.78	\$22.80
Total Manitoba Based Expenditures	\$9.09	\$35.83	\$9.41	\$54.32

The objective is to estimate the incremental expenditures made in Manitoba by international students. Expenditures are of two types, "Student Living Expenditures" and "Tuition & Educational Fees". "Total Estimated Manitoba Based Expenditures" is the sum of these.

(1) Student Living Expenditures are estimated using "Monthly Budget for Single Student Living Allowances in Manitoba in 2004/05" from Human Resources & Social Development Canada (HRSDC), and multiplying this expenditure by the estimated number of months present in Manitoba for students within each sector.

(2) Tuition & Educational Fees Paid are as reported to the Manitoba International Education Branch of Manitoba Intergovernmental Affairs & Trade. This figure does not include Tuition & Education Fees collected by non-reporting institutions. Actual Tuition & Educational Fees paid would be higher.

Table D. Total International Student Enrolment by World Region						
	Elementary & Secondary Schools		Post-Secondary Education		ESL Schools	Total Enrolment
	Exchange Students	Regular Students	College Student	University Students	ESL Students	
China & Hong Kong		71	50	1,386	545	2,052
Japan	53	52	10	80	306	501
South Korea	1	290	58	144	286	779
Other Asia		25	17	562	99	703
Total Asia	54	438	135	2,172	1,236	4,035
Africa	4	1	48	249	5	307
Europe	44	46	17	193	40	340
Middle East		3	6	201	83	293
North & Central America	4	128	18	222	141	513
Oceania		3		8		11
South America	6	82	8	33	39	168
Other / Unknown	84	137		22	4	247
TOTAL STUDENTS	196	838	232	3,100	1,548	5,914

Table E. Percent Distribution of International Students by World Region						
	Elementary & Secondary Schools		Post-Secondary Education		ESL Schools	Total Enrolment
	Exchange Students	Regular Students	College Students	University Students	ESL Students	
China & Hong Kong		8.5%	21.6%	44.7%	35.2%	34.7%
Japan	27.0%	6.2%	4.3%	2.6%	19.8%	8.5%
South Korea	0.5%	34.6%	25.0%	4.6%	18.5%	13.2%
Other Asia		3.0%	7.3%	18.1%	6.4%	11.9%
Total Asia	27.6%	52.3%	58.2%	70.1%	79.8%	68.2%
Africa	2.0%	0.1%	20.7%	8.0%	0.3%	5.2%
Europe	22.4%	5.5%	7.3%	6.2%	2.6%	5.7%
Middle East		0.4%	2.6%	6.5%	5.4%	5.0%
North & Central America	2.0%	15.3%	7.8%	7.2%	9.1%	8.7%
Oceania		0.4%		0.3%		0.2%
South America	3.1%	9.8%	3.4%	1.1%	2.5%	2.8%
Other / Unknown	42.9%	16.3%		0.7%	0.3%	4.2%
TOTAL STUDENTS	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Section II

THE POST SECONDARY SECTOR

UNIVERSITIES AND COLLEGES

Universities and colleges were asked to provide information about undergraduate and graduate students. Colleges were asked for data on regular program students, short-term students, and contract-training students. Both types of institutions were asked for student head counts and FTEs, or Full Time Equivalents.

The total 2004/05 post-secondary international student enrolment in Manitoba was 3,332. College enrolment accounted for 7.0% or 232 students. University enrolment accounted for 93.0% or 3,100 students, 607 of whom were enrolled in graduate studies. The University of Manitoba alone, accounted for 69.1% of total post-secondary international student enrolment in Manitoba, with the University of Winnipeg enrolling 14.7%.



The section on Potential Capacity looks at the ability of colleges and universities to enroll additional international students. This serves as an indicator for future growth in international education.

Estimating capacity is a complex task based on many variables including program flexibility, types of course taught, availability of qualified teachers and professors, and sufficient physical space and infrastructure.

Capacity is used as an institution-wide term in this context – breakdowns of specific faculties or programs are not examined. The report focuses on institutions' success in reaching their estimated capacity through medium and long-term measures.



Universities and colleges were asked to provide the cost of tuition, accommodation, and all related fees charged to international students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions in the section on Student Fees and Economic Impact.

This data, along with estimated student expenditures, was used to assess the amount of money that international students inject into the provincial economy.

Table 1. Total Enrolment by Institution: Colleges and Universities												
Total Post-Secondary International Students	Assiniboine Community College	I'Ecole Technique et Professionnelle	Red River College ⁽¹⁾	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary ⁽¹⁾	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total	
	Total College Enrolment	5	47	180							232	7.0%
University Undergraduate Enrolment				122	30	44	75	1,732	490	2,493	74.8%	
University Graduate Studies Enrolment							35	572		607	18.2%	
	COLLEGE ENROLMENT			UNIVERSITY ENROLMENT					TOTAL			
TOTAL STUDENTS	5	47	180	122	30	44	110	2,304	490	3,332	100%	
% OF TOTAL	0.2%	1.4%	5.4%	3.7%	0.9%	1.3%	3.3%	69.1%	14.7%	100%		

(1) Enrolment figures for Red River College and Providence College & Seminary include students enrolled in ESL/EAL programs, some of whom are concurrently enrolled in other program areas.

Total 2004/05 post-secondary international student enrolment in Manitoba is 3,332. College enrolment accounted for 7.0% or 232 students. University enrolment accounted for 93.0% or 3,100 students, 607 of which were enrolled in graduate studies.

The University of Manitoba alone, accounted for 69.1% of total post-secondary international student enrolment in Manitoba, with University of Winnipeg enrolling 14.7%.

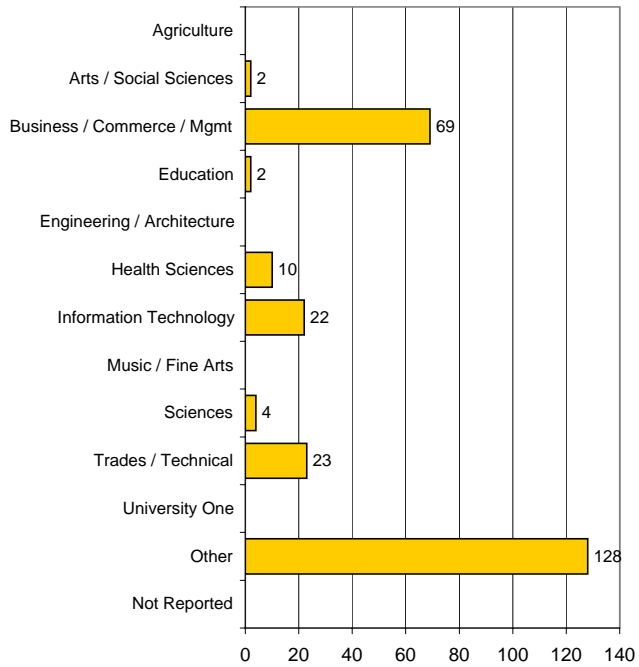
Table 2a. Total Enrolment by Institution & Area of Study											
Total Post-Secondary International Students	Assiniboine Community College	I'Ecole Technique et Professionnelle	Red River College ⁽¹⁾	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary ⁽¹⁾	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
	Agriculture								79		79
Arts / Social Sciences			2	85	30	6	43	319		485	14.4%
Business / Commerce / Mgmt	2	34	33			6	8	229		312	9.3%
Education		1	1	5		2	10	27		46	1.4%
Engineering / Architecture								275		275	8.2%
Health Sciences	1	2	7	3				140		153	4.6%
Information Technology	2	6	14				6			28	0.8%
Music / Fine Arts				8			10	25		43	1.3%
Sciences		4		18		2		376		400	11.9%
Trades / Technical			23				3			26	0.8%
University One						28		577		605	18.0%
Other			128	3			30	257		418	12.4%
Not Reported									490	490	14.6%
TOTAL STUDENTS	5	47	208	122	30	44	110	2,304	490	3,360	100.0%

(1) Enrolment figures for Red River College and Providence College & Seminary include students enrolled in ESL/EAL programs, some of whom are concurrently enrolled in other program areas. The program area ESL/EAL has been classified above as "Other" area of study. In addition, Area of Study information for Red River College does not provide unique student counts, and due to multiple areas of study the 180 international students at Red River College are identified as 208 enrolments by area of study.

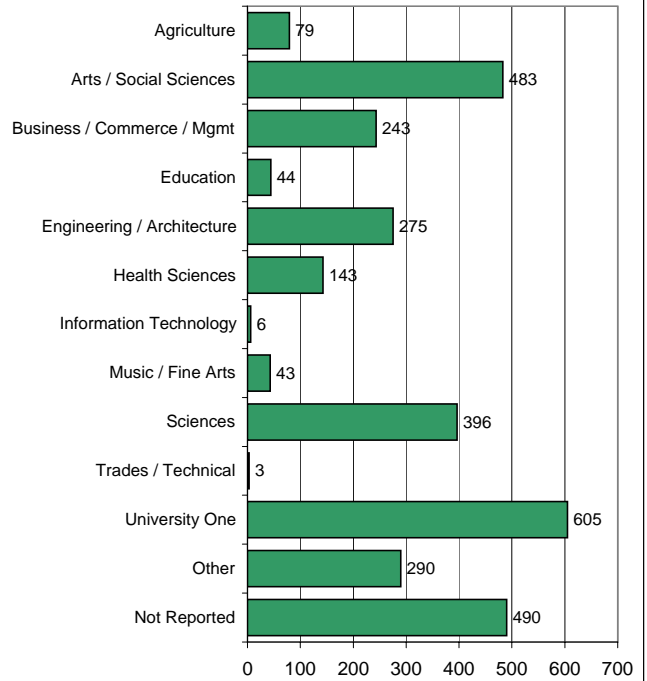
Table 2b. Graduate Student Enrolment by Institution & Area of Study				
Graduate Students	Providence College & Seminary	University of Manitoba	Total Enrolment	% of Total
Agriculture		63	63	10.4%
Arts / Social Sciences	21	85	106	17.5%
Business / Commerce / Mgmt	4	14	18	3.0%
Education	1	26	27	4.4%
Engineering / Architecture		130	130	21.4%
Health Sciences		132	132	21.7%
Information Technology	3		3	0.5%
Music / Fine Arts	5	2	7	1.2%
Sciences		100	100	16.5%
Trades / Technical				
University One				
Other	1	20	21	3.5%
Not Reported				
TOTAL GRAD STUDENTS	35	572	607	100.0%

Total College Enrolment by Area of Study

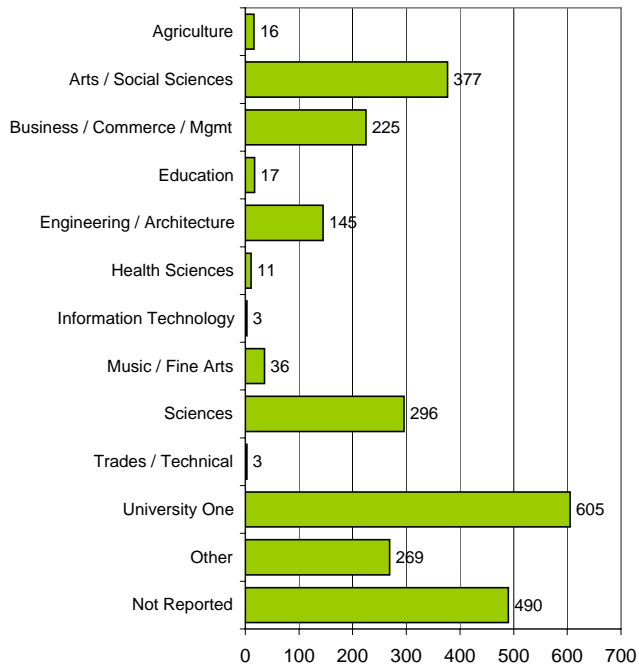
(see footnote under Table 2a)



Total University Enrolment by Area of Study



University - Undergraduate Enrolment by Area of Study



University - Graduate Student Enrolment by Area of Study

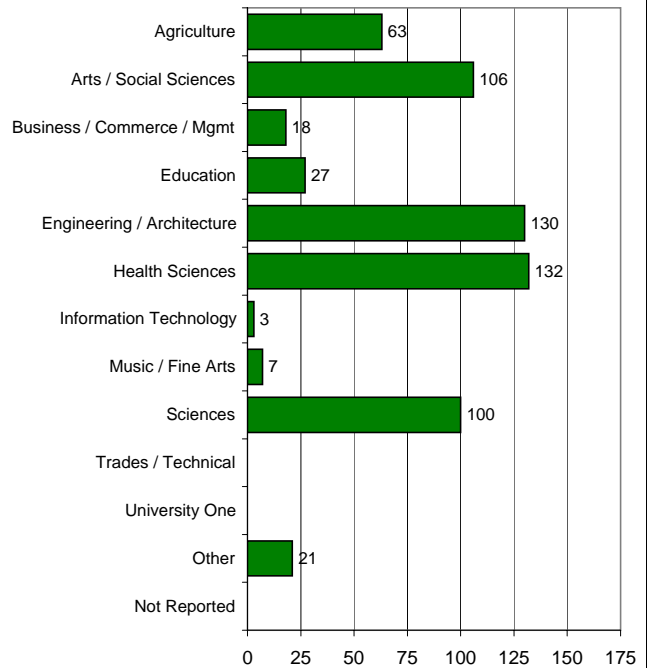


Table 3a. Total Enrolment by Institution & Country of Origin

Total Post-Secondary International Students	Institutions										Total Enrolment	% of Total
	Assiniboine Community College	l'Ecole Technique et Professionnelle	Red River College	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg			
Africa	2	37	9	29	6	24	8	131	51	297	8.9%	
Botswana				1				3		4	0.1%	
Burundi							1	4		5	0.2%	
Cameroon		3		16		1		2	1	23	0.7%	
Congo		1				2		1		4	0.1%	
Cote-d'Ivoire						1				1	0.0%	
Ghana				1			1	3	2	7	0.2%	
Kenya			1	3				15	5	24	0.7%	
Mali		6				13		3		22	0.7%	
Mauritania								1		1	0.0%	
Mauritius								4	2	6	0.2%	
Morocco		6				1		2	1	10	0.3%	
Mozambique								1		1	0.0%	
Namibia								1		1	0.0%	
Nigeria	2		2	6	2	1	4	70	29	116	3.5%	
Rwanda		1								1	0.0%	
Senegal		20	1			4				25	0.8%	
Sierra Leone				1				1		2	0.1%	
South Africa			1	1				8	1	11	0.3%	
Tanzania								1		1	0.0%	
Uganda							1		3	4	0.1%	
Zambia			2				1	6	5	14	0.4%	
Zimbabwe			2		4		1	5	2	14	0.4%	
Asia	1	1	133	66	8		51	1,694	353	2,307	69.2%	
Bangladesh	1			8	2			70	14	95	2.9%	
Bhutan			1							1	0.0%	
China, People's Republic		1	47	29			1	1,069	166	1,313	39.4%	
Hong Kong			2	4			11	71	35	123	3.7%	
India			9	1			1	123	14	148	4.4%	
Indonesia								33	3	36	1.1%	
Japan			10	3			1	46	30	90	2.7%	
Korea, North					2					2	0.1%	
Korea, South			58	6	4		35	77	22	202	6.1%	
Macau									1	1	0.0%	
Malaysia								79	18	97	2.9%	
Maldives								1		1	0.0%	
Myanmar							1	2	2	5	0.2%	
Nepal								3		3	0.1%	
Pakistan				3				13	13	29	0.9%	
Philippines			1				1	3	4	9	0.3%	
Singapore				1				17	8	26	0.8%	
Sri Lanka			1					19	4	24	0.7%	
Taiwan			1	11				42	11	65	2.0%	
Thailand			1					8	6	15	0.5%	
Vietnam			2					18	2	22	0.7%	

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Table 3a. Total Enrolment by Institution & Country of Origin (Continued)

Total Post-Secondary International Students	Institutions									Total Enrolment	% of Total
	Assiniboine Community College	l'Ecole Technique et Professionnelle	Red River College	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg		
Europe		7	10	7		14	11	137	24	210	6.3%
Albania								1		1	0.0%
Austria								1		1	0.0%
Belarus								1		1	0.0%
Belgium						1				1	0.0%
Bulgaria			1					1	2	4	0.1%
Croatia								2		2	0.1%
Czech Republic			1					1		2	0.1%
Denmark								6		6	0.2%
Finland								4		4	0.1%
France		6				11	2	24	1	44	1.3%
Germany			3	3		1	3	17	8	35	1.1%
Greece								1		1	0.0%
Hungary						1		5		6	0.2%
Iceland								4		4	0.1%
Ireland								2	1	3	0.1%
Italy				1				1		2	0.1%
Lithuania							1	1		2	0.1%
Netherlands								9		9	0.3%
Poland			1					6	3	10	0.3%
Portugal								1		1	0.0%
Romania								3		3	0.1%
Russia							1	11	2	14	0.4%
Serbia								1		1	0.0%
Spain								3		3	0.1%
Sweden			1					3		4	0.1%
Switzerland		1		1			1	3		6	0.2%
Ukraine							1	9	2	12	0.4%
United Kingdom			3	2			2	16	4	27	0.8%
Uzbekistan									1	1	0.0%
Middle East		1	5	2				182	17	207	6.2%
Egypt								11	1	12	0.4%
Ethiopia								2		2	0.1%
Iran		1						57	3	61	1.8%
Israel			1					4	2	7	0.2%
Jordan								7		7	0.2%
Kuwait								7		7	0.2%
Lebanon								2	2	4	0.1%
Libya			1					15		16	0.5%
Oman (Muscat)								2		2	0.1%
Palestine (Gaza & West Bank)								2		2	0.1%
Qatar								1		1	0.0%
Saudi Arabia			2					57	3	62	1.9%
Syria				1				3		4	0.1%
Turkey			1					8	6	15	0.5%
United Arab Emirates				1				3		4	0.1%
Yemen								1		1	0.0%

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Table 3a. Total Enrolment by Institution & Country of Origin (Continued)

Total Post-Secondary International Students	Institutions									Total Enrolment	% of Total
	Assiniboine Community College	l'Ecole Technique et Professionnelle	Red River College	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg		
North & Central America	1	1	16	14	12		39	133	24	240	7.2%
Aruba Island								1		1	0.0%
Barbados								1		1	0.0%
Belize								1	1	2	0.1%
Costa Rica								1		1	0.0%
Curacao							1			1	0.0%
Dominican Republic				1						1	0.0%
El Salvador									1	1	0.0%
Guatemala								1		1	0.0%
Haiti				1				1		2	0.1%
Honduras								1		1	0.0%
Jamaica							2	6	4	12	0.4%
Mexico		1	12	4				44	2	63	1.9%
Panama								1		1	0.0%
Saint Lucia			4					1	1	6	0.2%
Saint Vincent & Grenadines								1		1	0.0%
Trinidad-Tobago								9	1	10	0.3%
United States	1			8	12		36	64	14	135	4.1%
Oceania						1		4	3	8	0.2%
Australia								4	3	7	0.2%
New Caledonia						1				1	0.0%
South America	1		7	2	4		1	23	3	41	1.2%
Argentina Argentina			1							1	0.0%
Brazil Brazil			3	1			1	9	2	16	0.5%
Chile Chile			1					2		3	0.1%
Colombia Colombia								5	1	6	0.2%
Ecuador Ecuador				1	1					2	0.1%
Guyana Guyana								2		2	0.1%
Paraguay Paraguay					3					3	0.1%
Peru Peru	1							2		3	0.1%
Uruguay Uruguay								1		1	0.0%
Venezuela Venezuela			2					2		4	0.1%
Not Specified				2		5			15	22	0.7%
TOTAL STUDENTS	5	47	180	122	30	44	110	2,304	490	3,332	100.0%

Students originating from Asia number 2,307, or 69.2% of post-secondary international students in 2004/05. Africa, Europe, Middle East and North & Central America each provided 200-300 students in 2004/05.

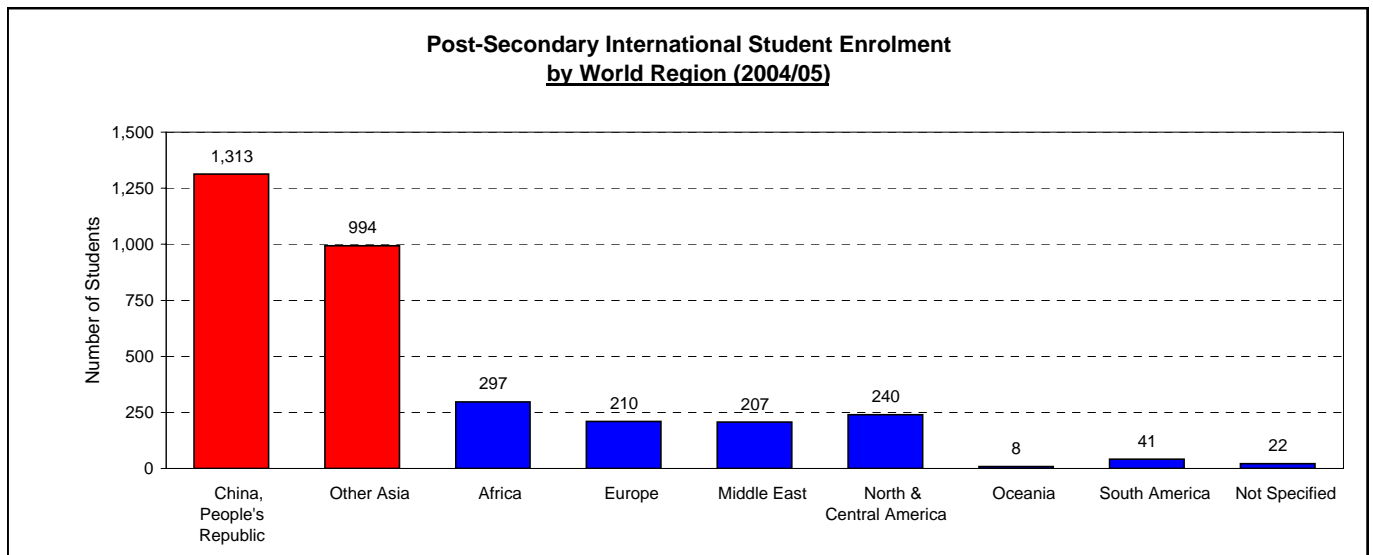


Table 3b. Total Enrolment by Top Countries of Origin (Greater Than 50 Students)

Total Post-Secondary International Students	Assiniboine Community College	I'Ecole Technique et Professionnelle	Red River College	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
China, People's Republic		1	47	29			1	1,069	166	1,313	39.4%
Korea, South			58	6	4		35	77	22	202	6.1%
India			9	1			1	123	14	148	4.4%
United States	1			8	12		36	64	14	135	4.1%
Hong Kong			2	4			11	71	35	123	3.7%
Nigeria	2		2	6	2	1	4	70	29	116	3.5%
Malaysia								79	18	97	2.9%
Bangladesh	1			8	2			70	14	95	2.9%
Japan			10	3			1	46	30	90	2.7%
Taiwan			1	11				42	11	65	2.0%
Mexico		1	12	4				44	2	63	1.9%
Saudi Arabia			2					57	3	62	1.9%
Iran		1						57	3	61	1.8%
SUB-TOTAL	4	3	143	80	20	1	89	1,869	361	2,570	77.1%
% Share of Institution Total	80.0%	6.4%	79.4%	65.6%	66.7%	2.3%	80.9%	81.1%	73.7%	77.1%	
TOTAL STUDENTS	5	47	180	122	30	44	110	2,304	490	3,332	100.0%

Thirteen countries had at least 50 students attending post-secondary studies in Manitoba in 2004/05. These 13 countries accounted for 2,570 (77.1%) of the total international student enrolment. Included in these 13 countries is the United States and Mexico, 8 countries in Asia, 2 from the Middle East and 1 from Africa.

For most of the schools, these top countries account for about 65-80% of the international student enrolment. Notable exceptions are I'Ecole Technique et Professionnelle and College Universitaire de St. Boniface with 6.4% and 2.3% of their international enrolment from the top source countries. These schools have comparatively fewer students from Asian and more from African countries where French is spoken.

Table 3c. Summary of Enrolment by World Region

Total Post-Secondary International Students	Assiniboine Community College	I'Ecole Technique et Professionnelle	Red River College	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
China, People's Republic		1	47	29			1	1,069	166	1,313	39.4%
Other Asia	1		86	37	8		50	625	187	994	29.8%
Africa	2	37	9	29	6	24	8	131	51	297	8.9%
Europe		7	10	7		14	11	137	24	210	6.3%
Middle East		1	5	2				182	17	207	6.2%
North & Central America	1	1	16	14	12		39	133	24	240	7.2%
Oceania						1		4	3	8	0.2%
South America	1		7	2	4		1	23	3	41	1.2%
Not Specified				2		5			15	22	0.7%
Total Enrolment	5	47	180	122	30	44	110	2,304	490	3,332	100%

**Post-Secondary International Student Enrolment
Percent Share by World Region (2004/05)**

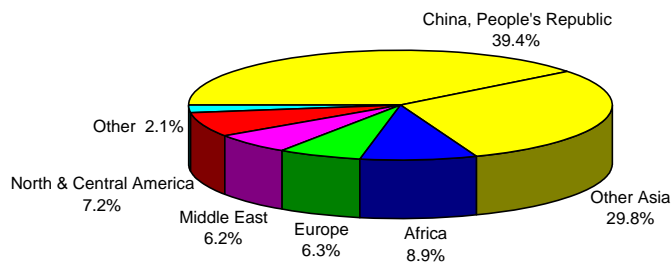


Table 4a. Enrolment by World Region: Percent Share Among Institutions

Total Post-Secondary International Students	Assiniboine Community College	I'Ecole Technique et Professionnelle	Red River College	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg	Total Enrolment
Asia	0.0%	0.0%	5.8%	2.9%	0.3%		2.2%	73.4%	15.3%	100.0%
Africa	0.7%	12.5%	3.0%	9.8%	2.0%	8.1%	2.7%	44.1%	17.2%	100.0%
Europe		3.3%	4.8%	3.3%		6.7%	5.2%	65.2%	11.4%	100.0%
Middle East		0.5%	2.4%	1.0%				87.9%	8.2%	100.0%
North & Central America	0.4%	0.4%	6.7%	5.8%	5.0%		16.3%	55.4%	10.0%	100.0%
Oceania						12.5%		50.0%	37.5%	100.0%
South America	2.4%		17.1%	4.9%	9.8%		2.4%	56.1%	7.3%	100.0%
Not Specified				9.1%		22.7%			68.2%	100.0%
TOTAL STUDENTS	0.2%	1.4%	5.4%	3.7%	0.9%	1.3%	3.3%	69.1%	14.7%	100.0%

I'Ecole Technique et Professionnelle and College Universitaire de St. Boniface, with 1.4% and 1.3% of post-secondary international students respectively (2.7% combined), have relatively high representation of students from Africa (20.5% for the two schools combined), Europe (10.0%) and Oceania (12.5%), and only 1 student from Asia (0.0%).

In a similar context, Assiniboine Community College, Red River College and Canadian Mennonite University, with 0.2%, 5.4% and 0.9% of post-secondary international students (6.5% combined), are the post-secondary institutions of choice for 29.3% of the students from South America.

The University of Manitoba, with 69.1% of all international post-secondary students in 2004/05, accounts for 73.4% of the students from Asia and 87.9% of the students from the Middle East, but only 55.4% of the students from North & Central America and 44.1% of the students from Africa.

Table 4b. Enrolment by World Region: Percent Share Within Institutions

Total Post-Secondary International Students	Assiniboine Community College	I'Ecole Technique et Professionnelle	Red River College	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg	Total Enrolment
Asia	20.0%	2.1%	73.9%	54.1%	26.7%		46.4%	73.5%	72.0%	69.2%
Africa	40.0%	78.7%	5.0%	23.8%	20.0%	54.5%	7.3%	5.7%	10.4%	8.9%
Europe		14.9%	5.6%	5.7%		31.8%	10.0%	5.9%	4.9%	6.3%
Middle East		2.1%	2.8%	1.6%				7.9%	3.5%	6.2%
North & Central America	20.0%	2.1%	8.9%	11.5%	40.0%		35.5%	5.8%	4.9%	7.2%
Oceania						2.3%		0.2%	0.6%	0.2%
South America	20.0%		3.9%	1.6%	13.3%		0.9%	1.0%	0.6%	1.2%
Not Specified				1.6%		11.4%			3.1%	0.7%
TOTAL STUDENTS	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Students from Asia account for 69.2% of the international post-secondary student population in 2004/05. Red River College, University of Manitoba and University of Winnipeg had even higher concentrations of students from Asia; 73.9%, 73.5% and 72.0% respectively.

Students from Africa account for 8.9% of the international post-secondary student population in 2004/05, and students from Europe account for 6.3%. However the international student population of I'Ecole Technique et Professionnelle is 78.7% from Africa and 14.9% from Europe, and the international student population of College Universitaire de St. Boniface is 54.5% from Africa and 31.8% from Europe.

Students from North & Central America account for 7.2% of the international post-secondary student population in 2004/05. In contrast, this region represents 40.0% of international students attending Canadian Mennonite University and 35.5% of students attending Providence College & Seminary.

Table 5. Actual and Targeted International Student Enrolment

Total Post-Secondary International Students	Assiniboine Community College	I'Ecole Technique et Professionnelle	Red River College (1)	Brandon University	Canadian Mennonite University	College Universitaire de St. Boniface	Providence College & Seminary	University of Manitoba	University of Winnipeg	Total (1)
2004/05 Enrolment	5	47		122	30	44	110	2,304	490	3,152
2004/05 Target Enrolment	10	45		210	23	35	120	2,719	485	3,647
% of Target Achieved	50.0%	104.4%		58.1%	130.4%	125.7%	91.7%	84.7%	101.0%	86.4%

(1) Red River College did not respond to the 2004/05 Survey. Therefore student enrolment targets were not provided.

Table 6. Total Estimated Manitoba Based Expenditures	
Average Student Expenditures per Month ⁽¹⁾	\$835
Student Expenditures per Year ⁽²⁾	\$6,680
Total Post-Secondary Students	3,332
Estimated Total Living Expenditures in Manitoba ⁽³⁾	\$22.26 Million
Tuition & Educational Fees Paid to Institutions ⁽⁴⁾	+ \$13.57 Million
Total Estimated Manitoba Based Expenditures	= \$35.83 Million

The objective is to estimate the incremental expenditures made in Manitoba by international post-secondary students. Expenditures are of two types, "Living Expenditures" and "Tuition & Educational Fees". "Total Estimated Manitoba Based Expenditures" is the sum of these.

(1) "Average Student Expenditures per Month" are estimated at \$835. The figure is published by Human Resources & Social Development Canada (HRSDC) as the Monthly Budget for Single Student Living Allowances in Manitoba in 2004/05, and includes \$344 for shelter, \$193 for grocery purchases, \$67 for local transportation and \$232 for other expenditures.

(2) The monthly student expenditure figure of \$835 translates to \$6,680 per student year, on the assumption that on average students would reside in Manitoba for eight months to attend post-secondary education in Manitoba.

(3) Total living expenditures in Manitoba is estimated by multiplying "total reported students" (3,332) by their "estimated yearly expenditure" (\$6,680).

(4) "Tuition & Educational Fees Paid to Institutions" (\$13.57 million) is as reported to the Manitoba International Education Branch of Manitoba Intergovernmental Affairs & Trade. Note that this figure does not include tuition and fees for the 180 students enrolled at Red River College, or the 122 students enrolled at Brandon University, due to non-response.

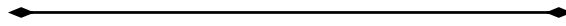
Section III

THE ELEMENTARY AND SECONDARY SECTOR*

SCHOOLS AND SCHOOL DIVISIONS

Schools and school divisions were asked to provide information on regular fee-paying students, exchange students, other non-fee paying students, ESL (English as a Second Language) students, and short-term study students.

Throughout this section, there are references to the public and independent school system. These terms are used to describe the education students receive at publicly funded schools/divisions and independent schools that receive public funds. Enrolment is further divided into sections representing Kindergarten to Grade 4, Grades 5-8 and each of Grades 9, 10, 11 and 12.



The section on Potential Capacity looks at the ability of schools/divisions to admit more students than are currently enrolled. This provides an indicator by which to gauge Manitoba's capacity for future growth in international education.

Estimating capacity is a complex task based on many variables including program flexibility, types of course taught, availability of qualified teachers and professors, and sufficient physical space and infrastructure.

Institutions were asked to assess their potential ability to admit more international students into their programs. This data was then evaluated against their actual international student enrollment to determine their total theoretical capacity and their success in reaching that theoretical capacity.



Schools/Divisions were asked to provide the costs of tuition, accommodation, and all related fees charged to international students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions in the section on Student Fees and Economic Impact.

This data, along with estimated student expenditures, was used to assess the amount of money that international students inject into the provincial economy.

*In Manitoba, three different groups fall under the designation of Independent schools. These are funded-independent schools, non-funded independent schools and home schooling. For this survey, funded-independent schools were surveyed for their enrolment of international students. Manitoba Education, Citizenship and Youth funds schools based upon guidelines (see http://www.edu.gov.mb.ca/k12/schools/ind/funded_ind.html) for regulations and policies.

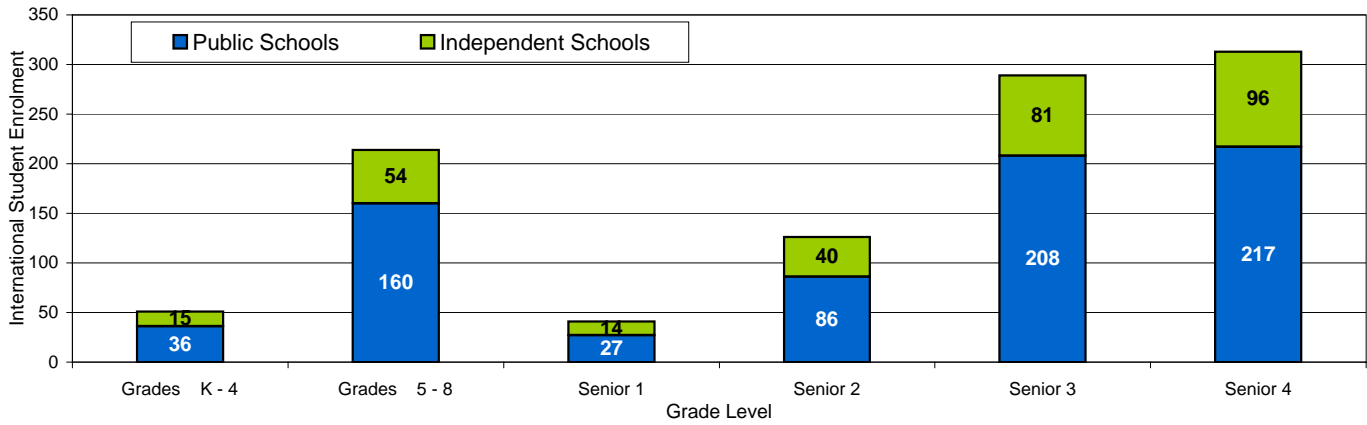
Table 1. Total Enrolment by Grade Level; Public & Independent School Systems

	Grades K - 4	Grades 5 - 8	Senior 1	Senior 2	Senior 3	Senior 4	Total Enrolment	% of Total
<u>PUBLIC SCHOOL SYSTEM</u>								
Evergreen						1	1	0.1%
Flin Flon				1		1	2	0.2%
Hanover					4	4	8	0.8%
Interlake		2	2	2	1	2	9	0.9%
Lakeshore					1		1	0.1%
Lord Selkirk	5	15	1	1	5	11	38	3.7%
Mystery Lake						1	1	0.1%
Park West					3	2	5	0.5%
Pembina Trails	13	53	9	38	19	42	174	16.8%
Pine Creek					1		1	0.1%
Portage La Prairie				1	1	2	4	0.4%
Prairie Spirit				1	1	2	4	0.4%
River East Transcona	4	28	7	14	82	40	175	16.9%
Rolling River				1	3	5	9	0.9%
Seven Oaks				1	3	1	5	0.5%
St. James-Assiniboia	10	30	3	5	39	25	112	10.8%
Sunrise	1	17			1	2	21	2.0%
Turtle Mountain	1	1					2	0.2%
Western		8	1	3	2	1	15	1.5%
Whiteshell		2	1				3	0.3%
Winnipeg	2	3		7	3	7	22	2.1%
Winnipeg Technical College						20	20	1.9%
Non-Reporting Divisions ⁽¹⁾		1	3	11	39	48	102	9.9%
PUBLIC SCHOOL SYSTEM TOTAL	36	160	27	86	208	217	734	71.0%
% of Total	4.9%	21.8%	3.7%	11.7%	28.3%	29.6%	100.0%	
<u>INDEPENDENT SCHOOLS</u>								
Balmoral Hall School		8	3	7	23	9	50	4.8%
Beautiful Savior Lutheran School	2						2	0.2%
Christ The King School	4	4					8	0.8%
Holy Cross School	1	11					12	1.2%
Mennonite Brethren Collegiate Inst.		3		2	1	1	7	0.7%
Mennonite Collegiate Institute				1	4	14	19	1.8%
Springs Christian Academy		4	4	3	2		13	1.3%
St. John's Ravenscourt School	1	3	1	7	5	4	21	2.0%
St. Mary's Academy						1	1	0.1%
St. Maurice School	2	2	1	3			8	0.8%
St. Paul's High School						2	2	0.2%
Steinbach Christian High School			1	1	2	1	5	0.5%
Westgate Mennonite Collegiate				1	22	3	26	2.5%
Winnipeg Mennonite Elementary	2	7					9	0.9%
Non-Reporting Schools ⁽¹⁾	3	12	4	15	22	61	117	11.3%
INDEPENDENT SCHOOLS TOTAL	15	54	14	40	81	96	300	29.0%
% of Total	5.0%	18.0%	4.7%	13.3%	27.0%	32.0%	100.0%	
TOTAL INTERNATIONAL STUDENTS	51	214	41	126	289	313	1,034	100.0%
% of Total	4.9%	20.7%	4.0%	12.2%	27.9%	30.3%	100.0%	

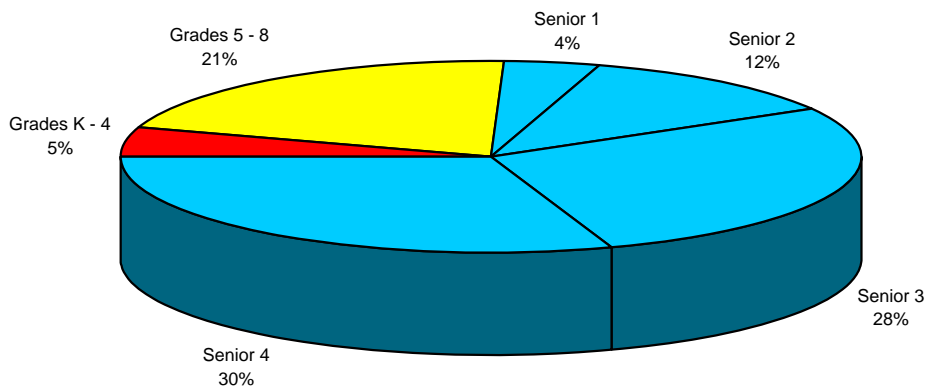
Thank you also to the following institutions which replied to the International Student Survey, but reported no international students for 2004/05: Alhijra Islamic School, Austin Christian Academy, Children's House, Christian Heritage School, Montessori Learning Centre, St. Charles Interparochial School.

(1) Enrolment for Non-Reporting Institutions is based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2004).

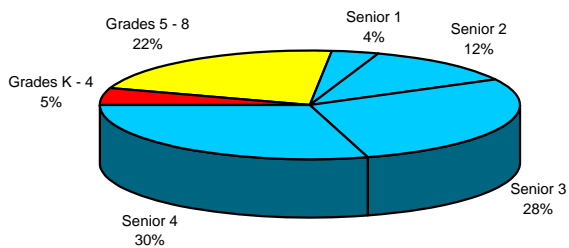
Enrolment by Grade Level (2004/05)



Enrolment by Grade Level All Schools (2004/05)



Public Schools



Independent Schools

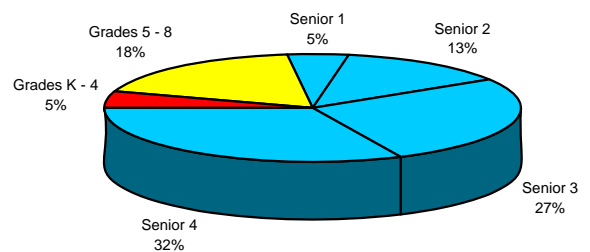


Table 2. Length/Type of Enrolment & Full-Time Equivalency (FTE)

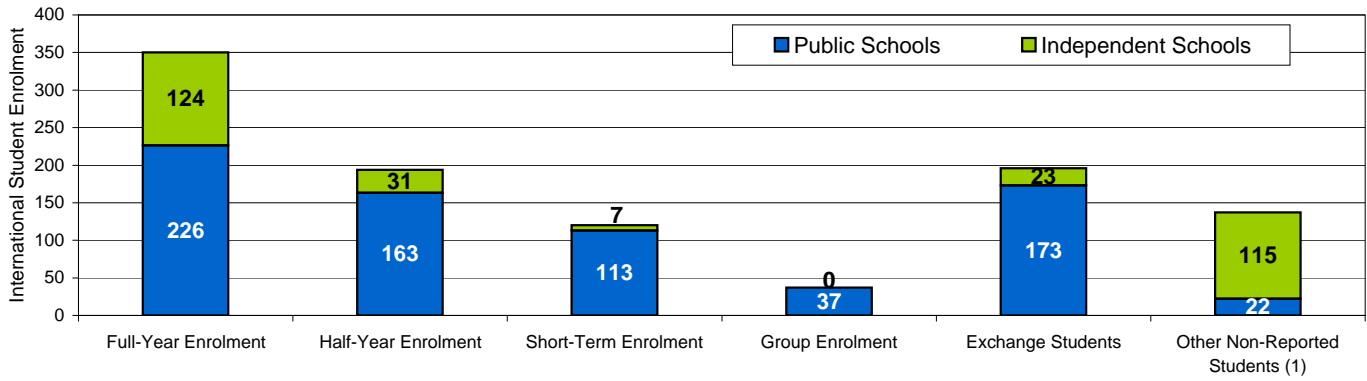
	Full-Year Enrolment	Half-Year Enrolment	Short-Term Enrolment	Group Enrolment	Exchange Students	Other Non-Reported Students ⁽¹⁾	Total International Students	Full-Time Equivalent Enrolment	% of Total FTE
PUBLIC SCHOOL SYSTEM									
Evergreen	1						1	1	0.2%
Flin Flon	1				1		2	1	0.2%
Hanover		1			7		8	1	0.2%
Interlake	9						9	9	1.6%
Lakeshore	1						1	1	0.2%
Lord Selkirk	9	9	20				38	17	3.1%
Mystery Lake					1		1		
Park West					5		5		
Pembina Trails	63	43	34	32	2		174	93	16.7%
Pine Creek					1		1		
Portage La Prairie	1				3		4	1	0.2%
Prairie Spirit					4		4		
River East Transcona	59	45	23		48		175	92	16.6%
Rolling River	1				8		9	1	0.2%
Seven Oaks					5		5		
St. James-Assiniboia	41	51	18		2		112	75	13.5%
Sunrise			12	5	4		21	3	0.5%
Turtle Mountain		2					2	1	0.2%
Western	13	2					15	14	2.5%
Whiteshell	1	2					3	2	0.4%
Winnipeg	16		4		2		22	17	3.1%
Winnipeg Technical College	10	8	2				20	16	2.9%
Non-Reporting Divisions ⁽¹⁾					80	22	102	11	2.0%
PUBLIC SCHOOL SYSTEM TOTAL	226	163	113	37	173	22	734	356	64.1%
% of Total	30.8%	22.2%	15.4%	5.0%	23.6%	3.0%	100.0%		
INDEPENDENT SCHOOLS									
Balmoral Hall School	40	10					50	45	8.1%
Beautiful Savior Lutheran School	2						2	2	0.4%
Christ The King School	3	5					8	5	0.9%
Holy Cross School	8	4					12	10	1.8%
Mennonite Brethren Collegiate Inst.	6	1					7	6	1.1%
Mennonite Collegiate Institute	19						19	19	3.4%
Springs Christian Academy	8	5					13	11	2.0%
St. John's Ravenscourt School	21						21	21	3.8%
St. Mary's Academy	1						1	1	0.2%
St. Maurice School	3	3			2		8	5	0.9%
St. Paul's High School	1				1		2	1	0.2%
Steinbach Christian High School	5						5	5	0.9%
Westgate Mennonite Collegiate	6		2		18		26	7	1.3%
Winnipeg Mennonite Elementary	1	3	5				9	4	0.7%
Non-Reporting Schools ⁽¹⁾					2	115	117	58	10.4%
INDEPENDENT SCHOOLS TOTAL	124	31	7		23	115	300	200	35.9%
% of Total	41.3%	10.3%	2.3%		7.7%	38.3%	100.0%		
TOTAL INTERNATIONAL STUDENTS	350	194	120	37	196	137	1,034	556	100.0%
% of Total	33.8%	18.8%	11.6%	3.6%	19.0%	13.2%	100.0%		

Type/Length of Enrolment Definitions:

- Full-Year Enrolment:** Regular international students enrolled for 8 to 10 months at reporting institution.
- Half-Year Enrolment:** Regular international students enrolled for 3 to 7 months at reporting institution.
- Short-Term Enrolment:** Regular international students enrolled for less than 3 months at reporting institution.
- Group Enrolment:** Students enrolled as part of a group for a specialized program (e.g., summer program).
- Exchange Students:** Inbound international exchange students (non-fee paying).
- Full-Time Equivalent Enrolment:** Estimation of full-time equivalency does not include exchange students.

(1) Enrolment for Non-Reporting Institutions is based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2004). A breakdown was provided for Exchange Students and Other International Students. Exchange Students are not included in Full-Time Equivalency estimates. Other Non-Reported Students are assumed to be enrolled for half the year on average for purposes of estimating Total Full-Time Equivalent International Students.

Total Enrolment by Length/Type (2004/05)



(1) Enrolment for Non-Reporting Institutions is based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2004). SFB Data provided a breakdown between Exchange Students and Other International Students.

Total Enrolment by Length/Type All Schools (2004/05)

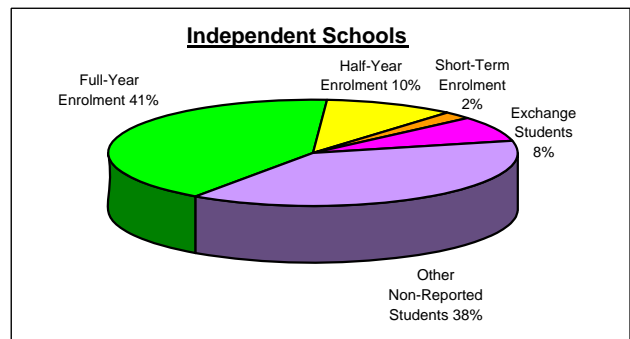
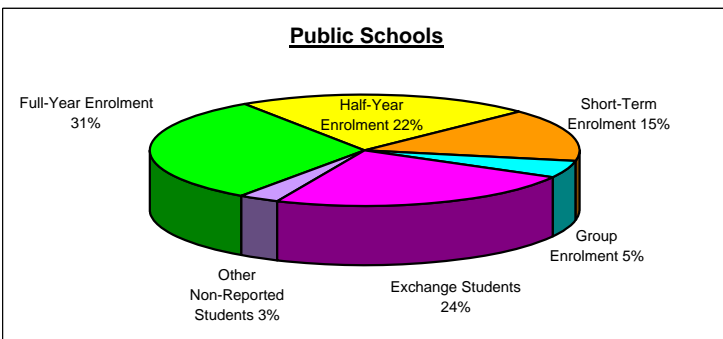
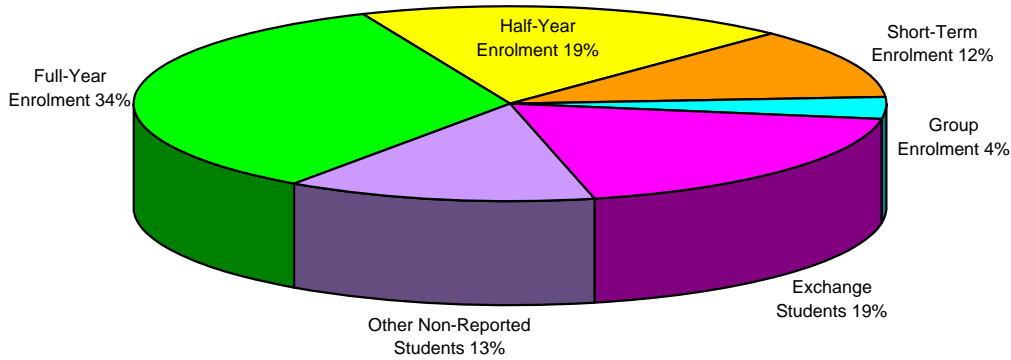
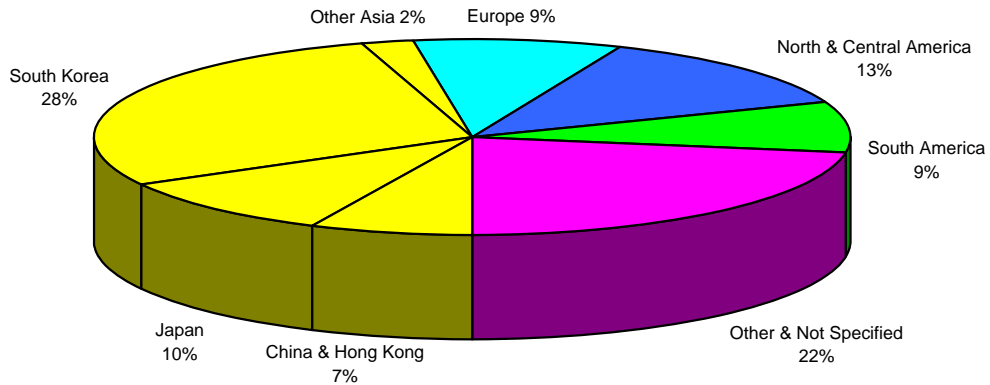


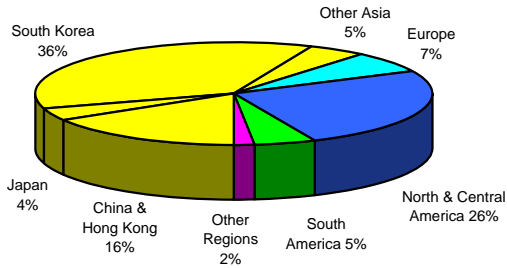
Table 3. Country of Origin by Length/Type of Enrolment									
	Full-Year Enrolment	Half-Year Enrolment	Short-Term Enrolment	Group Enrolment	Exchange Students	Other Non-Reported Students ⁽¹⁾	Total	International Students	% of Total
AFRICA			1			4		5	0.5%
Burundi		1						1	0.1%
Ghana					4			4	0.4%
ASIA	214	83	113	28	54		492		47.6%
Brunei Darussalam	1							1	0.1%
China, People's Republic	19	9	1					29	2.8%
Hong Kong	38	2	2					42	4.1%
Indonesia	1							1	0.1%
Japan	14	12	3	23	53			105	10.2%
Korea, South	126	55	104	5	1			291	28.1%
Malaysia		1						1	0.1%
Philippines		1						1	0.1%
Singapore	1	1						2	0.2%
Taiwan	7	2						9	0.9%
Thailand	2		3					5	0.5%
Vietnam	5							5	0.5%
EUROPE	23	20	3		44		90		8.7%
Austria					1			1	0.1%
Czech Republic	1							1	0.1%
Denmark					1			1	0.1%
Finland					2			2	0.2%
France					4			4	0.4%
Germany	15	18	3		31			67	6.5%
Ireland	1							1	0.1%
Italy	1				2			3	0.3%
Netherlands					1			1	0.1%
Russia	1							1	0.1%
Slovakia	4							4	0.4%
Switzerland					1			1	0.1%
Ukraine					1			1	0.1%
United Kingdom		2						2	0.2%
MIDDLE EAST	3						3		0.3%
Israel	1							1	0.1%
Saudi Arabia	1							1	0.1%
United Arab Emirates	1							1	0.1%
NORTH & CENTRAL AMERICA	90	27	2	9	4		132		12.8%
Mexico	86	26	1	9	4			126	12.2%
Nicaragua			1					1	0.1%
United States	4	1						5	0.5%
OCEANIA	3						3		0.3%
Australia	3							3	0.3%
SOUTH AMERICA	17	63	2		6		88		8.5%
Brazil	15	63			4			82	7.9%
Colombia	1				1			2	0.2%
Ecuador			2					2	0.2%
Guyana	1							1	0.1%
Venezuela					1			1	0.1%
NOT SPECIFIED⁽¹⁾					84	137		221	21.4%
TOTAL	350	194	120	37	196	137	1,034		100.0%

(1) "Not Specified" includes 219 additional students from Non-Reporting Institutions based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2004). SFB Data provides a breakdown between Exchange Students and Other International Students, but no information on Country of Origin.

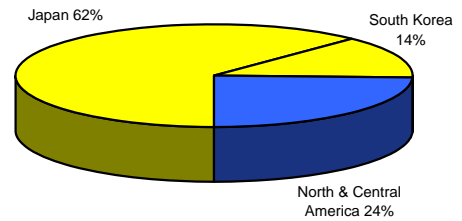
Enrolment by World Region All International Students (2004/05)



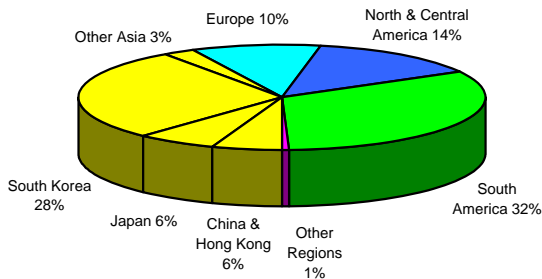
Full-Year Enrolment (350)



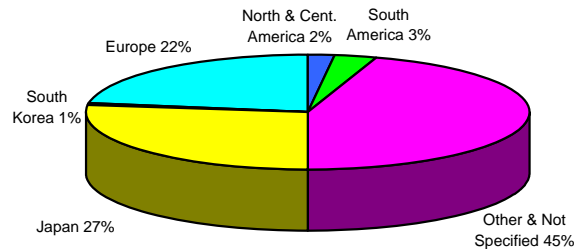
Group Enrolment (37)



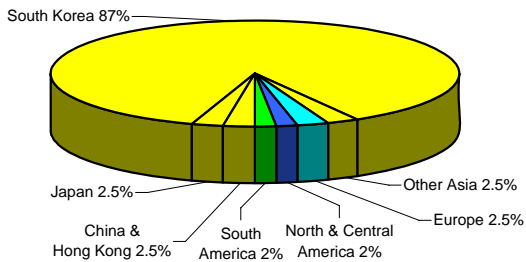
Half-Year Enrolment (194)



Exchange Students (196)



Short-Term Enrolment (120)



(1) "Other & Not Specified" includes international students reported for Africa, Middle East and Oceania, as well as students from Non-Reporting Institutions based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2004). SFB Data provides a breakdown between Exchange Students and Other International Students, but no information on Country of Origin.

Table 4a. Distribution of Length/Type of Enrolment by World Region

	Full-Year Enrolment	Half-Year Enrolment	Short-Term Enrolment	Group Enrolment	Exchange Students	Other Non-Reported Students ⁽¹⁾	Total International Students
Africa	20.0%		80.0%			100.0%	
Asia	43.5%	16.9%	23.0%	5.7%	11.0%	100.0%	
Europe	25.6%	22.2%	3.3%	48.9%			100.0%
Middle East	100.0%						100.0%
North & Central America	68.2%	20.5%	1.5%	6.8%	3.0%	100.0%	
Oceania	100.0%						100.0%
South America	19.3%	71.6%	2.3%	6.8%			100.0%
Not Specified⁽¹⁾					38.0%	62.0%	100.0%
TOTAL STUDENTS	33.8%	18.8%	11.6%	3.6%	19.0%	13%	100.0%

Focusing on Asia, North & Central America, Europe and South America (represented by 492, 132, 90 and 88 students, respectively); students from Asia and North & Central America tended to Full-Year Enrolment (43.5% of Asian Students, 68.2% of North & Central American Students); 25.6% of students from Europe were in Full-Year Enrolment while 48.9% were Exchange Students; 71.6% of students from South America were in Half-Year Enrolment.

Table 4b. Distribution of World Region by Length/Type of Enrolment

	Full-Year Enrolment	Half-Year Enrolment	Short-Term Enrolment	Group Enrolment	Exchange Students	Other Non-Reported Students ⁽¹⁾	Total International Students
Africa	0.5%		2.0%			0.5%	
Asia	61.1%	42.8%	94.2%	75.7%	27.6%	47.6%	
Europe	6.6%	10.3%	2.5%	22.4%			8.7%
Middle East	0.9%						0.3%
North & Central America	25.7%	13.9%	1.7%	24.3%	2.0%	12.8%	
Oceania	0.9%						0.3%
South America	4.9%	32.5%	1.7%	3.1%			8.5%
Not Specified⁽¹⁾					42.9%	100.0%	21.4%
TOTAL STUDENTS	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

To illustrate the relative importance of students from Asia, although only 11.0% are identified as Exchange Students (Table 4a), students from Asia outnumber Exchange Students from any other world region, representing 27.6% of Exchange Students (Table 4b.). Students from Europe account for 22.4% of Exchange Students, although only 57.1% of Exchange Students are identified by world region - 42.9% of Exchange Students are not identified by world region.

As another example, 5.7% of Asian Students and 6.8% of North & Central American Students were categorized under Group Enrolment (Table 4a.). But in terms of Total Group Enrolment, students from Asia account for 75.7%, compared to 24.3% for students from North & Central America (Table 4b.).

(1) "Not Specified" includes 219 additional students from Non-Reporting Institutions based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2004). SFB Data provides a breakdown between Exchange Students and Other International Students, but no information on Country of Origin.

Table 5a. Institutions Reporting International Students; Manitoba Regions

	Number of Public Institutions Reporting	Number of Independent Schools Reporting	Total Number of Reporting Institutions
Northern & Remote	2		2
Parkland & Westman	3		3
Central	4	1	5
Interlake & Southeast	7	1	8
Winnipeg	6	12	18
TOTAL INSTITUTIONS	22	14	36

Table 5b. Total Enrolment by Grade Level; Manitoba Regions

	Grades K - 4	Grades 5 - 8	Senior 1	Senior 2	Senior 3	Senior 4	Total Enrolment	% of Total
Northern & Remote				1		2	3	0.4%
Parkland & Westman	1	1		1	6	7	16	2.0%
Central		8	1	6	9	19	43	5.3%
Interlake & Southeast	6	36	5	4	14	21	86	10.6%
Winnipeg	41	156	28	88	199	155	667	81.8%
REPORTED ENROLMENT	48	201	34	100	228	204	815	100.0%
NON-REPORTED ENROLMENT ⁽¹⁾	3	13	7	26	61	109	219	
TOTAL ENROLMENT	51	214	41	126	289	313	1,034	

Table 5c. Length/Type of Enrolment; Manitoba Regions

	Full-Year Enrolment	Half-Year Enrolment	Short-Term Enrolment	Group Enrolment	Exchange Students	Other Non-Reported Students ⁽¹⁾	Total International Students	Full-Time Equivalent Enrolment	% of Total FTE
Northern & Remote	1				2		3	1	0.2%
Parkland & Westman	1	2			13		16	2	0.4%
Central	33	2			8		43	34	7.0%
Interlake & Southeast	26	12	32	5	11		86	39	8.0%
Winnipeg	289	178	88	32	80		667	411	84.4%
REPORTED ENROLMENT	350	194	120	37	114		815	487	100.0%
NON-REPORTED ENROLMENT ⁽¹⁾					82	137	219	69	
TOTAL ENROLMENT	350	194	120	37	196	137	1,034	556	

(1) "Non-Reported Enrolment" consists of 219 additional students from Non-Reporting Institutions, who were reported to Schools Finance Branch Collection of International Student Data (Sept. 30, 2004). The SFB Data provides a breakdown by Grade Level and for Exchange Students and Other International Students. Exchange Students are not included in Full-Time Equivalency estimates. Other Non-Reported Students are assumed to be enrolled for half the year on average for purposes of estimating Total Full-Time Equivalent International Students.

Table 6. Actual & Targeted Enrolment (Excluding Exchange Students & Non-Reporting Institutions)			
	Actual Enrolment (excluding exchange)	Target Enrolment	% of Target Achieved
<u>PUBLIC SCHOOL SYSTEM</u>			
Evergreen	1	0	
Flin Flon	1	0	
Hanover	1	0	
Interlake	9	8	113%
Lakeshore	1	3	33%
Lord Selkirk	38	20	190%
Mystery Lake		0	
Park West		0	
Pembina Trails	172	200	86%
Pine Creek		0	
Portage La Prairie	1	2	50%
Prairie Spirit		0	
River East Transcona	127	90	141%
Rolling River	1	0	
Seven Oaks		0	
St. James-Assiniboia	110	95	116%
Sunrise	17	0	
Turtle Mountain	2	0	
Western	15	0	
Whiteshell	3	0	
Winnipeg	20	0	
Winnipeg Technical College	20	0	
PUBLIC SCHOOL SYSTEM TOTAL	539	418	128.9%
<u>INDEPENDENT SCHOOLS</u>			
Balmoral Hall School	50	50	100%
Beautiful Savior Lutheran School	2	0	
Christ The King School	8	3	267%
Holy Cross School	12	12	100%
Mennonite Brethren Collegiate Inst.	7	0	
Mennonite Collegiate Institute	19	8	238%
Springs Christian Academy	13	0	
St. John's Ravenscourt School	21	24	88%
St. Mary's Academy	1	0	
St. Maurice School	6	6	100%
St. Paul's High School	1	0	
Steinbach Christian High School	5	10	50%
Westgate Mennonite Collegiate	8	6	133%
Winnipeg Mennonite Elementary	9	0	
INDEPENDENT SCHOOLS TOTAL	162	119	136.1%
TOTAL - ALL RESPONDING SCHOOLS	701	537	130.5%

For both public and private schools, Actual Enrolment exceeded Target Enrolment by about 30-35%. This results from many schools enrolling one or a few international students while not reporting an international student target. Should some of these schools report target enrolment in future surveys, the Percentage of Target Enrolment Achieved may drop substantially, even if Actual Enrolment were to increase.

Table 7. Total Estimated Manitoba Based Expenditures	
Full-Time Equivalent (FTE) Enrolment ⁽¹⁾	556
Average Student Expenditures per Month ⁽²⁾	\$835
Estimated Expenditure per FTE Student ⁽³⁾	\$8,350
Estimated Total Living Expenditures in Manitoba ⁽⁴⁾	\$4.64 Million
Tuition & Educational Fees Paid to Institutions ⁽⁵⁾	+ \$4.45 Million
TOTAL ESTIMATED MANITOBA BASED EXPENDITURES	= \$9.09 Million

The objective is to estimate the incremental expenditures made in Manitoba by international students. Expenditures are of two types, "Living Expenditures" and "Tuition & Educational Fees". "Total Estimated Manitoba Based Expenditures" is the sum of these.

(1) Full-Time Equivalent (FTE) enrolment is calculated for the students attending each institution, with students enrolled at non-reporting institutions assumed to average half-year enrolment as indicated in Table 2. The final estimate of 556 FTE international students excludes exchange students.

(2) "Average Student Expenditures per Month" are estimated by Human Resources & Social Development Canada (HRSDC) as the Monthly Budget for Single Student Living Allowances in Manitoba in 2004/05, and includes \$344 for shelter, \$193 for grocery purchases, \$67 for local transportation and \$232 for other expenditures.

(3) The above student expenditure figure of \$835/month is multiplied by 10, to estimate each student's expenditures for 10 months (i.e., the expenditure level associated with a FTE student).

(4) "Estimated Total Living Expenditures in Manitoba" (\$4.64 million) is the number of FTE students (556) multiplied by the estimated yearly expenditure (\$8,350).

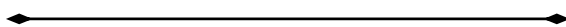
(5) "Tuition & Educational Fees Paid to Institutions" (\$4.45 million) is as reported to the Manitoba International Education Branch of Manitoba Intergovernmental Affairs & Trade. This figure does not include Tuition & Education Fees collected by non-reporting institutions. Actual Tuition & Education Fees paid would be higher.

Section IV

THE LANGUAGE SECTOR

ENGLISH AS A SECOND LANGUAGE SCHOOLS

English as a Second Language (ESL) schools in Manitoba were asked to provide information for all the students enrolled in their programs. This section examines students in ESL programs who are not concurrently enrolled in other post-secondary programs. That is, they are enrolled in ESL programs only. Most of the students at Red River College who are enrolled in ESL courses are also concurrently enrolled in regular academic programs and are thus not reported in this section.



Many students come to Manitoba for the sole purpose of studying English as a Second Language. Many others, however, require ESL training in order to pursue their degree or diploma programs in Manitoba. ESL programs are thus a vital conduit for admitting international students to Manitoba's educational institutions. Knowing the ability of ESL schools to admit more students provides a key indicator by which to gauge Manitoba's capacity for growth in the international education sector. This is examined in the tables on "Actual & Targeted International Student Enrolment by Institution".

Estimating capacity is a complex task based on many variables including program flexibility, types of course taught, availability of qualified teachers and professors, and sufficient physical space and infrastructure.

Institutions were asked to assess their potential ability to admit more international students into their programs. This data was then evaluated against their actual international student enrolment to determine their total theoretical capacity and their success in reaching that theoretical capacity.



ESL schools were asked to provide the costs of tuition, accommodation, and all related fees charged to international ESL students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions in the section on "Student Fees and Economic Impact".

This data, along with estimated student expenditures, was used to estimate the amount of money that international students inject into the provincial economy.

Table 1. Total Enrolment by Institution & Concurrent Enrolment Status

Total International ESL Students	Applied Linguistics Centre ⁽¹⁾	Brandon University	Heartland International English School	Red River College ⁽²⁾	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment	% of Total
Total Enrolment by Institution									
Number of Students		57	270		387	479	355	1,548	100.0%
Percent Share of Total		3.7%	17.4%		25.0%	30.9%	22.9%	100.0%	
Concurrently Enrolled in Post-Secondary Program									
Number of Students									
Percent Share of Total									
Not Concurrently Enrolled in Post-Secondary Program									
Number of Students		57	270		387	479	355	1,548	100.0%
Percent Share of Total		3.7%	17.4%		25.0%	30.9%	22.9%	100.0%	

(1) Applied Linguistics Centre did not respond to the 2004/05 Survey.

(2) ESL enrolment at Red River College is represented in the international student enrolment counts collected for the post-secondary sector.

Total 2004/05 ESL International Student Enrolment in Manitoba is 1,548 Students.

None of these students were reported to be concurrently enrolled in other post-secondary studies.

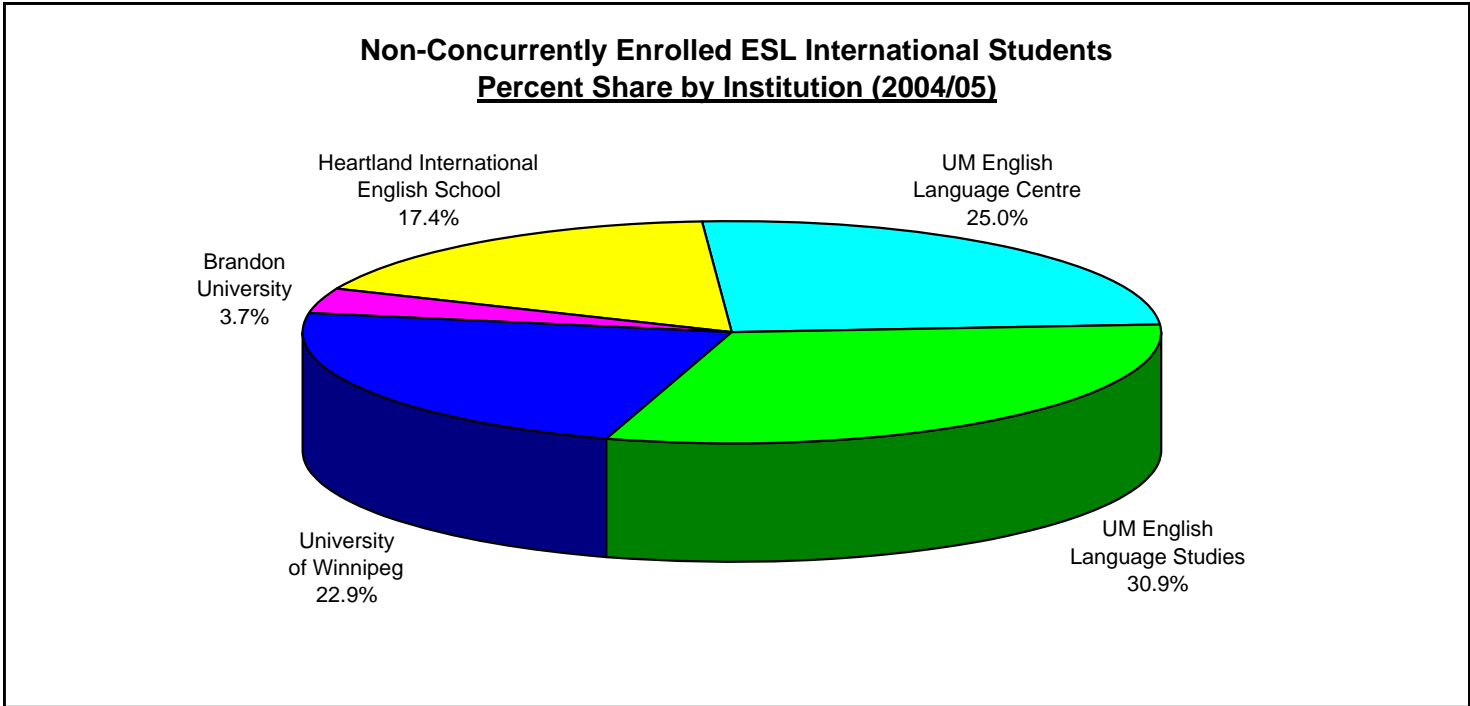


Table 2a. Enrolment by Institution & Number of Weeks Enrolled

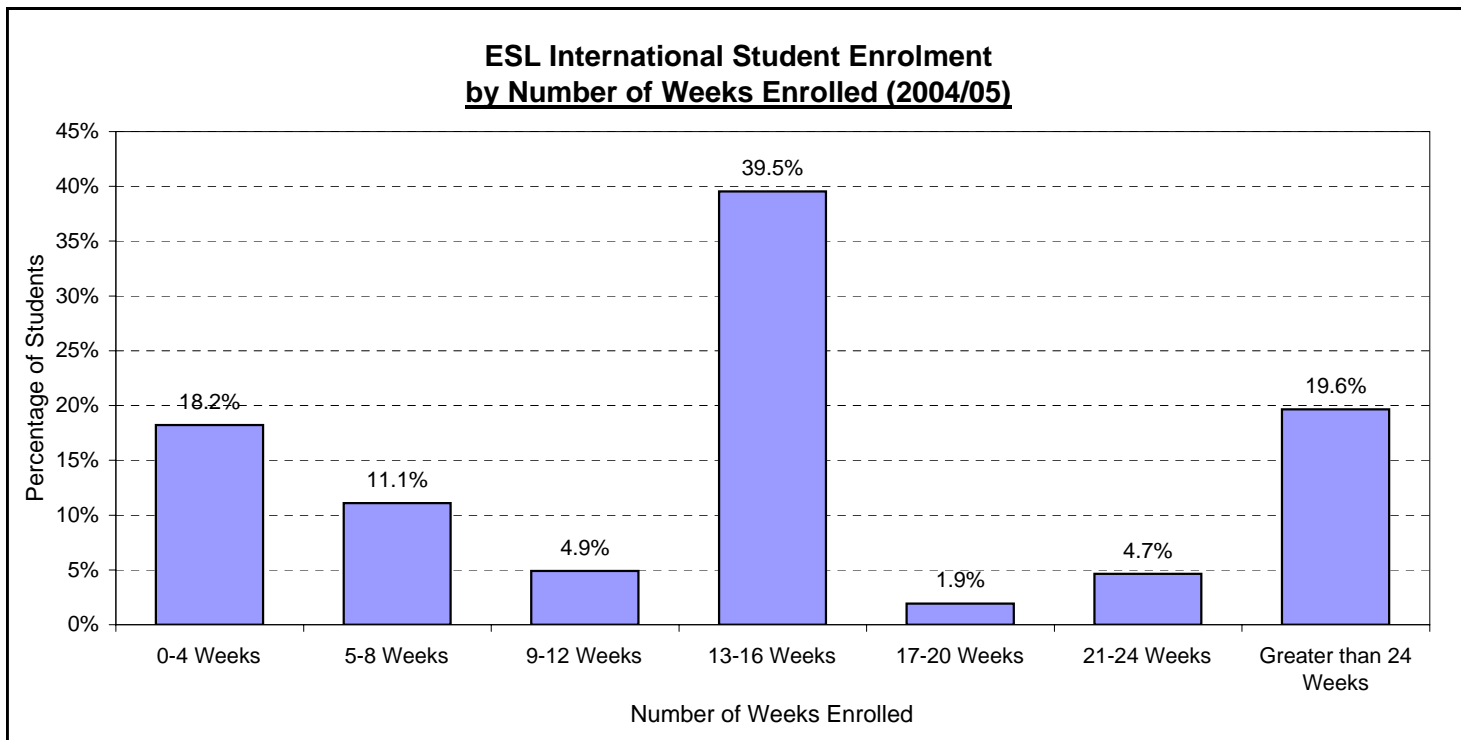
Non-Concurrently Enrolled International ESL Students	<i>Applied Linguistics Centre</i>	<i>Brandon University</i>	<i>Heartland International English School</i>	<i>Red River College</i>	<i>UM English Language Centre</i>	<i>UM English Language Studies</i>	<i>University of Winnipeg</i>	Total Enrolment	% of Total
ESL Enrolment									
1 Week			11					11	0.7%
2 Weeks			17					17	1.1%
3 Weeks			8				5	13	0.8%
4 Weeks			76			139	26	241	15.6%
5 Weeks			9			74		83	5.4%
6 Weeks			7					7	0.5%
7 Weeks			3					3	0.2%
8 Weeks			31			48		79	5.1%
9 Weeks			7					7	0.5%
10 Weeks			6					6	0.4%
11 Weeks			1					1	0.1%
12 Weeks			25			30	7	62	4.0%
13 Weeks		31	5					36	2.3%
14 Weeks			4		312		214	530	34.2%
15 Weeks			1					1	0.1%
16 Weeks			14			31		45	2.9%
17 Weeks			1					1	0.1%
18 Weeks			3					3	0.2%
19 Weeks			4					4	0.3%
20 Weeks			6			16		22	1.4%
21 Weeks			2					2	0.1%
22 Weeks			2					2	0.1%
23 Weeks			2					2	0.1%
24 Weeks			15			51		66	4.3%
25 Weeks			4					4	0.3%
26 Weeks		19						19	1.2%
28 Weeks			1		74	15	72	162	10.5%
29 Weeks			2					2	0.1%
32 Weeks						18		18	1.2%
36 Weeks			1			6		7	0.5%
39 Weeks		7						7	0.5%
40 Weeks			1			10		11	0.7%
42 Weeks					1		31	32	2.1%
44 Weeks			1			5		6	0.4%
48 Weeks						36		36	2.3%
Total Number of Students		57	270		387	479	355	1,548	100%
Total Weeks of ESL Study ⁽¹⁾		1,170	2,588		6,482	7,270	6,517	24,027	
Average Enrolment (Weeks) ⁽²⁾		20.5	9.6		16.7	15.2	18.4	15.5	

(1) "Total Weeks of ESL Study" is the sum of all weeks for all students. For example, 1 student enrolled for 10 weeks plus 2 students enrolled for 12 weeks would represent 34 Weeks of ESL Study (i.e., 10+12+12=34). In this manner, each institution has a reported "Number of Students" and "Total Weeks of ESL Study".

(2) "Average Enrolment (Weeks)" is the average length of enrolment of international ESL students within each institution (in weeks). The average length of enrolment of international ESL students (for reporting institutions in 2004/05) is 15.5 Weeks, with 1,548 students receiving 24,027 weeks of instruction.

Table 2b. Summary of Enrolment by Number of Weeks Enrolled

Non-Concurrently Enrolled International ESL Students	Applied Linguistics Centre	Brandon University	Heartland International English School	Red River College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment	% of Total
	ESL Enrolment								
0-4 Weeks			112			139	31	282	18.2%
5-8 Weeks			50			122		172	11.1%
9-12 Weeks			39			30	7	76	4.9%
13-16 Weeks		31	24		312	31	214	612	39.5%
17-20 Weeks			14			16		30	1.9%
21-24 Weeks			21			51		72	4.7%
Greater than 24 Weeks		26	10		75	90	103	304	19.6%
Total Number of Students		57	270		387	479	355	1,548	100.0%
Total Weeks of ESL Study		1,170	2,588		6,482	7,270	6,517	24,027	
Average Enrolment (Weeks)		20.5	9.6		16.7	15.2	18.4	15.5	



In 2004/05, 34.2% of international ESL students were enrolled for 0-12 weeks, 46.1% were enrolled for 13-24 weeks and 19.6% were enrolled for longer than 24 weeks.

Table 3a. Enrolment by Institution & Country of Origin

Non-Concurrently Enrolled International ESL Students	<i>Applied Linguistics Centre</i>	<i>Brandon University</i>	<i>Heartland International English School</i>	<i>Red River College</i>	<i>UM English Language Centre</i>	<i>UM English Language Studies</i>	<i>University of Winnipeg</i>	Total Enrolment	% of Total
Africa			1			1	3	5	0.3%
Djibouti							1	1	0.1%
Mali			1					1	0.1%
Morocco							1	1	0.1%
Swaziland						1	1	2	0.1%
Asia		51	167		354	353	311	1,236	79.8%
Bangladesh					4		4	8	0.5%
China, People's Republic		39	3		293	52	142	529	34.2%
Hong Kong		4	5		1	1	5	16	1.0%
India			2					2	0.1%
Indonesia					2		1	3	0.2%
Japan		3	60		10	174	59	306	19.8%
Korea, South		4	65		28	94	95	286	18.5%
Malaysia					2		1	3	0.2%
Philippines		1						1	0.1%
Sri Lanka					1			1	0.1%
Taiwan			30		2	22	3	57	3.7%
Thailand			2		4	6	1	13	0.8%
Vietnam					7	4		11	0.7%
Europe		1	22		3	9	5	40	2.6%
Austria			1					1	0.1%
Belarus							1	1	0.1%
France			3			5		8	0.5%
Germany			4				2	6	0.4%
Hungary						1		1	0.1%
Italy			4				1	5	0.3%
Poland			1		1	2		4	0.3%
Portugal			1					1	0.1%
Slovenia			1					1	0.1%
Spain			5				1	6	0.4%
Switzerland		1	2					3	0.2%
Ukraine					2	1		3	0.2%
Middle East		1	7		22	47	6	83	5.4%
Iran					5	1		6	0.4%
Israel			2				1	3	0.2%
Kuwait					2	1		3	0.2%
Libya			3		4	11	2	20	1.3%
Saudi Arabia		1	2		6	30	2	41	2.6%
Sudan							1	1	0.1%
Turkey					4	4		8	0.5%
United Arab Emirates					1			1	0.1%

North & Central America		4	51		3	59	24	141	9.1%
Guatemala		1						1	0.1%
Haiti		1						1	0.1%
Mexico		2	51		3	59	24	139	9.0%
Oceania									
South America			20		5	9	5	39	2.5%
Argentina			2			1	1	4	0.3%
Brazil			14		4	3	4	25	1.6%
Colombia			1					1	0.1%
Ecuador						2		2	0.1%
Paraguay			2					2	0.1%
Peru					1	2		3	0.2%
Venezuela			1			1		2	0.1%
Other / Unknown			2			1	1	4	0.3%
TOTAL STUDENTS		57	270		387	479	355	1,548	100.0%

Students Originating from Asia represent 79.8% of international ESL students in 2004/05. The top three represented countries are in Asia; People's Republic of China (529), South Korea (286) and Japan (306). Mexico represents the fourth largest number of international ESL students (139).

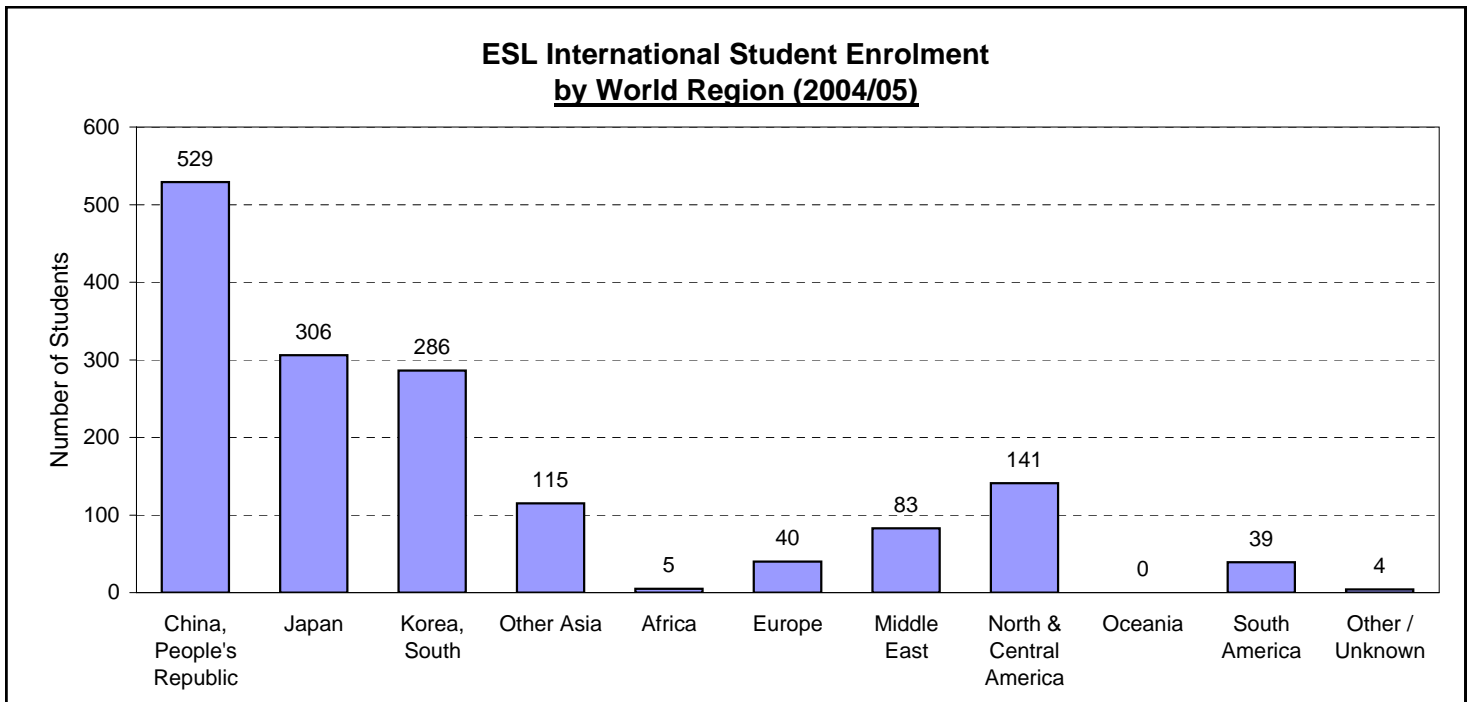


Table 3b. Summary of Enrolment by World Region

Non-Concurrently Enrolled International ESL Students								Total Enrolment	% of Total
	Applied Linguistics Centre	Brandon University	Heartland International English School	Red River College	UM English Language Centre	UM English Language Studies	University of Winnipeg		
China, People's Republic		39	3		293	52	142	529	34.2%
Japan		3	60		10	174	59	306	19.8%
Korea, South		4	65		28	94	95	286	18.5%
Other Asia		5	39		23	33	15	115	7.4%
Africa			1			1	3	5	0.3%
Europe		1	22		3	9	5	40	2.6%
Middle East		1	7		22	47	6	83	5.4%
North & Central America		4	51		3	59	24	141	9.1%
Oceania									
South America			20		5	9	5	39	2.5%
Other / Unknown			2			1	1	4	0.3%
TOTAL STUDENTS		57	270		387	479	355	1,548	100%

**ESL International Student Enrolment
Percent Share by World Region (2004/05)**

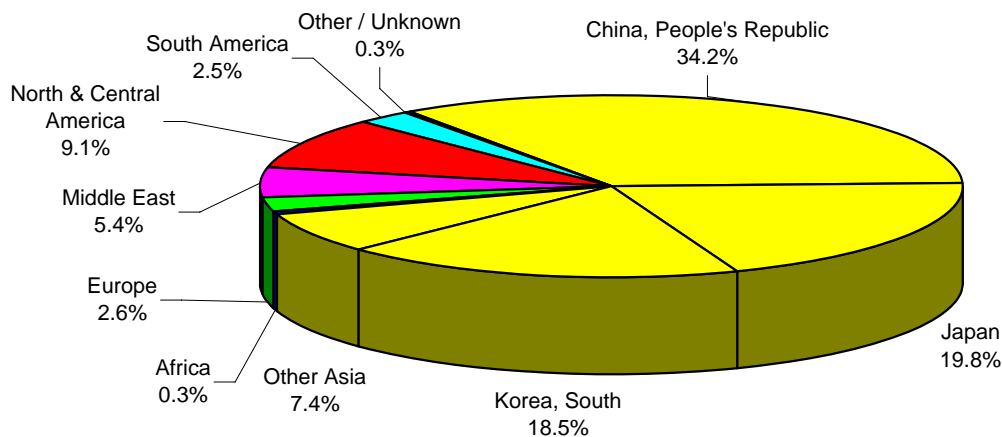


Table 4a. Enrolment by World Region: Percent Share Among Institutions

Non-Concurrently Enrolled International ESL Students	<i>Applied Linguistics Centre</i>	<i>Brandon University</i>	<i>Heartland International English School</i>	<i>Red River College</i>	<i>UM English Language Centre</i>	<i>UM English Language Studies</i>	<i>University of Winnipeg</i>	Total Enrolment
Asia		4.1%	13.5%		28.6%	28.6%	25.2%	100.0%
Africa			20.0%			20.0%	60.0%	100.0%
Europe		2.5%	55.0%		7.5%	22.5%	12.5%	100.0%
Middle East		1.2%	8.4%		26.5%	56.6%	7.2%	100.0%
North & Central America		2.8%	36.2%		2.1%	41.8%	17.0%	100.0%
Oceania								
South America			51.3%		12.8%	23.1%	12.8%	100.0%
Other / Unknown			50.0%			25.0%	25.0%	100.0%
TOTAL STUDENTS		3.7%	17.4%		25.0%	30.9%	22.9%	100.0%

Heartland International English School, with 17.4% of international ESL students, had 55.0% of the students from Europe and 51.3% of the students from South America.

University of Manitoba English Language Studies, with 30.9% of international ESL students, had 56.6% of the students from the Middle East and 41.8% of the students from North & Central America.

Table 4b. Enrolment by World Region: Percent Share Within Institutions

Non-Concurrently Enrolled International ESL Students	<i>Applied Linguistics Centre</i>	<i>Brandon University</i>	<i>Heartland International English School</i>	<i>Red River College</i>	<i>UM English Language Centre</i>	<i>UM English Language Studies</i>	<i>University of Winnipeg</i>	Total Enrolment
Asia		89.5%	61.9%		91.5%	73.7%	87.6%	79.8%
Africa			0.4%			0.2%	0.8%	0.3%
Europe		1.8%	8.1%		0.8%	1.9%	1.4%	2.6%
Middle East		1.8%	2.6%		5.7%	9.8%	1.7%	5.4%
North & Central America		7.0%	18.9%		0.8%	12.3%	6.8%	9.1%
Oceania								
South America			7.4%		1.3%	1.9%	1.4%	2.5%
Other / Unknown			0.7%			0.2%	0.3%	0.3%
TOTAL STUDENTS		100.0%	100.0%		100.0%	100.0%	100.0%	100.0%

Students from Asia account for 79.8% of the international ESL student population in 2004/05.

The lowest representation of Asian students occurs at Heartland International English School (61.9%), which also has a relatively high proportion of North & Central American students (18.9%).

The highest representation of Asian students occurs at the University of Manitoba English Language Centre (91.5%).

Table 5. Actual & Targeted International Student Enrolment by Institution

Non-Concurrently Enrolled International ESL Students	<i>Applied Linguistics Centre</i>	<i>Brandon University</i>	<i>Heartland International English School</i>	<i>Red River College</i>	<i>UM English Language Centre</i>	<i>UM English Language Studies</i>	<i>University of Winnipeg</i>	Total Enrolment
2004/05 Enrolment		57	270		387	479	355	1,548
2004/05 Target Enrolment		74	300		400	550	625	1,949
% of Target Achieved		77.0%	90.0%		96.8%	87.1%	56.8%	79.4%

Actual & Targeted ESL International Student Enrolment (2004/05)

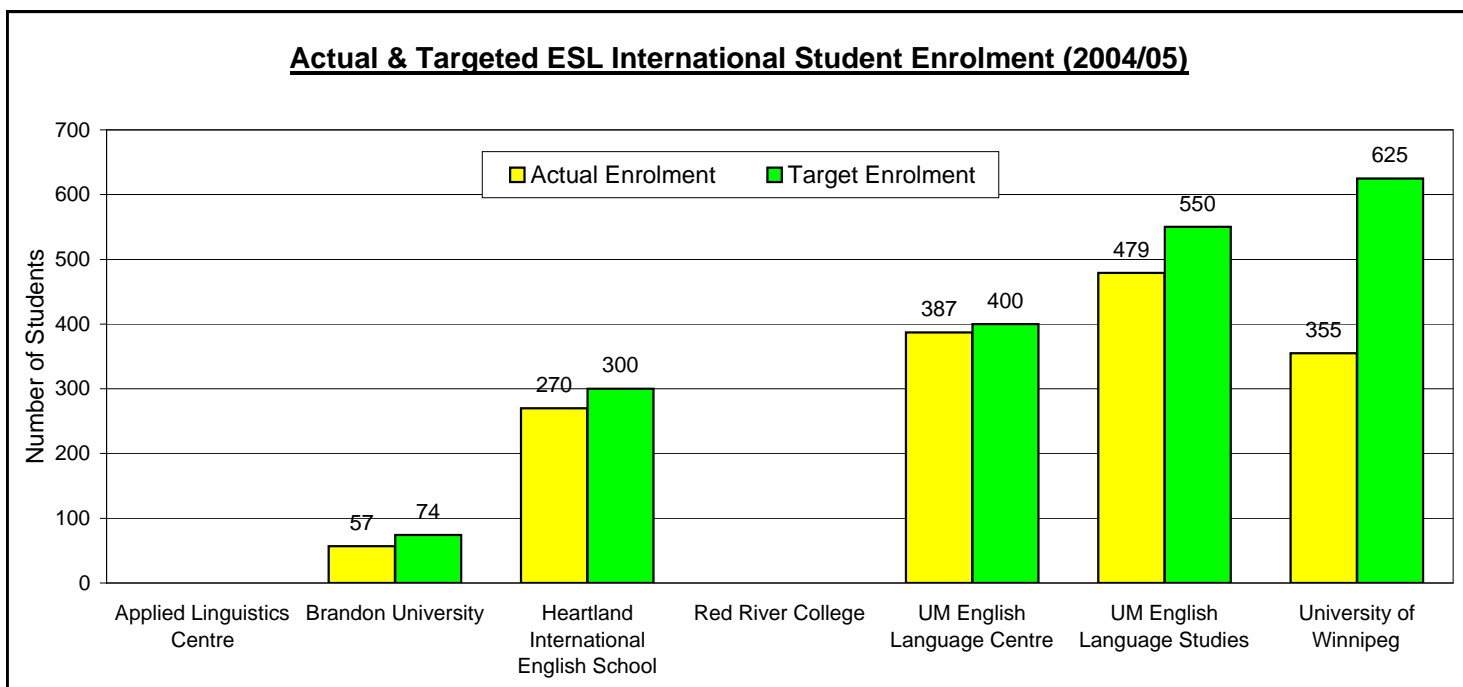


Table 6. Total Estimated Manitoba Based Expenditures	
Average Student Expenditures per Month ⁽¹⁾	\$835
Equivalent Weekly Expenditure ⁽²⁾	\$193
Total Weeks of ESL Study	24,027
Estimated Total Living Expenditures in Manitoba	\$4.63 Million
Tuition & Educational Fees Paid to Institutions ⁽³⁾	+ \$4.78 Million
Total Estimated Manitoba Based Expenditures	= \$9.41 Million

The objective is to estimate the incremental expenditures made in Manitoba by international ESL students. Expenditures are of two types, "Living Expenditures" and "Tuition & Educational Fees". "Total Estimated Manitoba Based Expenditures" is the sum of these.

(1) "Average Student Expenditures per Month" are estimated at \$835. The figure is published by Human Resources & Social Development Canada (HRSDC) as the Monthly Budget for Single Student Living Allowances in Manitoba in 2004/05, and includes \$344 for shelter, \$193 for grocery purchases, \$67 for local transportation and \$232 for other expenditures.

(2) The monthly student expenditure figure of \$835 translates to \$193 per week, which when multiplied by the 24,027 Total Weeks of ESL Study (Table 2a) yields an estimate of International ESL students' expenditures of \$4.63 million in Manitoba, in 2004/05.

(3) "Tuition & Educational Fees Paid to Institutions" (\$4.78 million) is as reported to the Manitoba International Education Branch of Manitoba Intergovernmental Affairs & Trade.