
***REPORT ON
INTERNATIONAL
STUDENTS IN MANITOBA
2013/14***

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Section I

INTRODUCTION

The Government of Manitoba is committed to working with our partners in the education community, post-secondary, elementary/secondary, language institutions, and the Manitoba Council for International Education, to fully develop the international education sector, and to realize its 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, and diversifying our economy. 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 with international students enhances Manitoba's global 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 Manitoba. After graduating from a Manitoba post-secondary institution, some international students choose to remain in Manitoba and contribute their much needed skills to the workforce. Finally, after working for six months in a permanent job in Manitoba, international student graduates can begin the process of becoming permanent residents of Manitoba, and eventually citizens of Canada, by applying to the International Student Stream of the Manitoba Provincial Nominee Program (PNP).

International students can be found in Manitoba's elementary and secondary schools, post-secondary institutions, and English as an Additional Language programs. This report examines the numbers of international students in these three sectors during 2013/14, their areas of study, country of origin, and lengths of stay. It also examines the capacity of provincial education providers to enrol international students, and the economic impact of international students on the province.

The 2013/14 survey of international activities was widely circulated to Manitoba's designated education providers, who were asked to provide information voluntarily. Some institutions provided partial data and others indicated that 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.

During the 2013/14 academic year, 11,174 international students studied in Manitoba– a 29.1% increase from the previous year's enrolment of 8,655. The estimated total of tuition and academic fees paid by these students exceeded \$77.15M – a 22.5% increase from the previous year's total of \$63M. If both the academic and the non-academic spending of these students is combined, their total economic impact surpassed an estimated \$157.92M.

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

International Students - All Sector Roll-Up - Manitoba 2013/14

Table A. Total International Student Enrolment by Sector

	Elementary & Secondary Schools		Post-Secondary Education ⁽¹⁾		ESL Schools ⁽²⁾	Total Enrolment
	Exchange Students	Regular Students	College Students	University Students	ESL Students	
Total International Students	107	1,324	1,015	7,225	1,503	11,174
Percent Share of Total	1.0%	11.8%	9.1%	64.7%	13.5%	100.0%

(1) Note that some post-secondary institutions have been recategorized from "college" to "university", compared to earlier summary reports.

(2) 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	College Students	University Students	ESL Students ⁽²⁾	
Reported Enrolment ⁽³⁾	n/a	985	1,015	7,200	1,945	11,145
Target Enrolment	n/a	948	870	6,561	2,145	10,524
% of Target Achieved		103.9%	116.7%	109.7%	90.7%	105.9%

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

(2) For comparison to Target enrolment, ESL enrolment presented here includes students concurrently enrolled in other post-secondary programs.

(3) 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⁾	\$8.89	\$67.57	\$4.31	\$80.77
Tuition & Educational Fees Paid ⁽²⁾	\$8.74	\$59.61	\$8.80	\$77.15
Total Manitoba Based Expenditures	\$17.63	\$127.18	\$13.11	\$157.92

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" from Employment and Social Development Canada (ESDC), 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 Education and Training. This figure does not include Tuition & Education Fees collected by non-reporting institutions. Actual Tuition & Educational Fees paid would be higher.

International Students - All Sector Roll-Up - Manitoba 2013/14

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	2	304	386	2,823	392	3,907
Japan	25	62	9	47	216	359
South Korea	5	182	39	178	266	670
Other Asia	1	48	264	1,474	76	1,863
Total Asia	33	596	698	4,522	950	6,799
Africa	2	21	155	1,452	25	1,655
Europe	16	143	31	301	55	546
Middle East		2	12	399	92	505
North & Central America	1	46	50	268	157	522
Oceania		2	1	16		19
South America	8	388	60	161	224	841
Other / Unknown	47	126	8	106		287
TOTAL STUDENTS	107	1,324	1,015	7,225	1,503	11,174

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	1.9%	23.0%	38.0%	39.1%	26.1%	35.0%
Japan	23.4%	4.7%	0.9%	0.7%	14.4%	3.2%
South Korea	4.7%	13.7%	3.8%	2.5%	17.7%	6.0%
Other Asia	0.9%	3.6%	26.0%	20.4%	5.1%	16.7%
Total Asia	30.8%	45.0%	68.8%	62.6%	63.2%	60.8%
Africa	1.9%	1.6%	15.3%	20.1%	1.7%	14.8%
Europe	15.0%	10.8%	3.1%	4.2%	3.7%	4.9%
Middle East		0.2%	1.2%	5.5%	6.1%	4.5%
North & Central America	0.9%	3.5%	4.9%	3.7%	10.4%	4.7%
Oceania		0.2%	0.1%	0.2%		0.2%
South America	7.5%	29.3%	5.9%	2.2%	14.9%	7.5%
Other / Unknown	43.9%	9.5%	0.8%	1.5%		2.6%
TOTAL STUDENTS	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Section II

POST SECONDARY SECTOR UNIVERSITIES AND COLLEGES

Universities and colleges in Manitoba were asked to provide information about international students enrolled in undergraduate, post-graduate, and graduate programs, as well as in exchange and other non-fee paying programs. Colleges were asked for data on international students enrolled in regular, short-term, exchange and other non-fee paying programs, as well as cohorts of international students in contract-training programs. All institutions were asked for student head counts and Full Time Equivalents (FTE).

Of the total 11,174 international students studying in Manitoba in 2013/14, 8,240 (73.7%) were enrolled in post-secondary institutions. College enrolment accounted for 1,015 students (12.3%), and university enrolment for 7,225 students (87.7%), 973 (13.5%) of whom were enrolled in graduate studies. The University of Manitoba alone accounted for 46.2% of the total post-secondary international student enrolment in Manitoba, with the International College of Manitoba enrolling 30.9%, Red River College 9.9%, and The University of Winnipeg 6.2%.

----- **Capacity and Targets** -----

Table 5 and Table A, outlining institutional targets for international student enrolment, reflect the potential capacity of universities and colleges to enroll additional international students. This serves as a key indicator for future growth of the international education sector in Manitoba at the post-secondary level.

Estimating capacity in the post-secondary sector is a complex task based on many variables including demand for programs from domestic students, program flexibility and scalability, availability of qualified instructors, and sufficient physical space and infrastructure.

Universities and colleges were asked to assess their potential capacity to admit additional international students into their programs. Their target was then compared with their actual international student enrollment to determine their success in reaching their own enrolment targets. (Capacity is used here as an institution-wide term – breakdowns of specific faculties or programs are not examined.)

----- **Economic Impact** -----

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 tables outlining *Student Fees and Economic Impact*.

This data, along with estimated student expenditures, was used to estimate the value of the post-secondary component of the international education sector to the provincial economy in 2013/14.

International Post-Secondary Students: Manitoba 2013/14

Table 1. Total Enrolment by Institution: Colleges and Universities

Total Post-Secondary International Students	Assiniboine Community College	l'Ecole Technique et Professionnelle Red River College ⁽¹⁾	MB Institute of Trades and Technology ⁽²⁾ Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total	
Total College Enrolment	85	112	818								1,015	12.3%	
University Undergraduate Enrolment				2	146	23	2,547	52	122	2,888	472	6,252	75.9%
University Graduate Studies Enrolment					13			8		917	35	973	11.8%
	COLLEGE ENROLMENT			UNIVERSITY ENROLMENT							TOTAL		
TOTAL STUDENTS	85	112	818	2	159	23	2,547	60	122	3,805	507	8,240	100%
% OF TOTAL	1.0%	1.4%	9.9%	0.0%	1.9%	0.3%	30.9%	0.7%	1.5%	46.2%	6.2%	100%	

(1) Enrolment figures for Red River College include students enrolled in ESL/EAL programs.

(2) Manitoba Institute of Trades & Technology did not respond to the 2013/14 International Student Survey.

Total 2013/14 post-secondary international student enrolment in Manitoba is 8,240. College enrolment accounted for 12.3% or 1,015 students. University enrolment accounted for 87.7% or 7,225 students, 973 of whom were graduate students.

Four post-secondary institutions accounted for over 90% of international student enrolment: University of Manitoba (46.2%), International College of Manitoba (30.9%), University of Winnipeg (6.2%), and Red River College (9.9%).

Table 2a. Total Enrolment by Institution & Area of Study

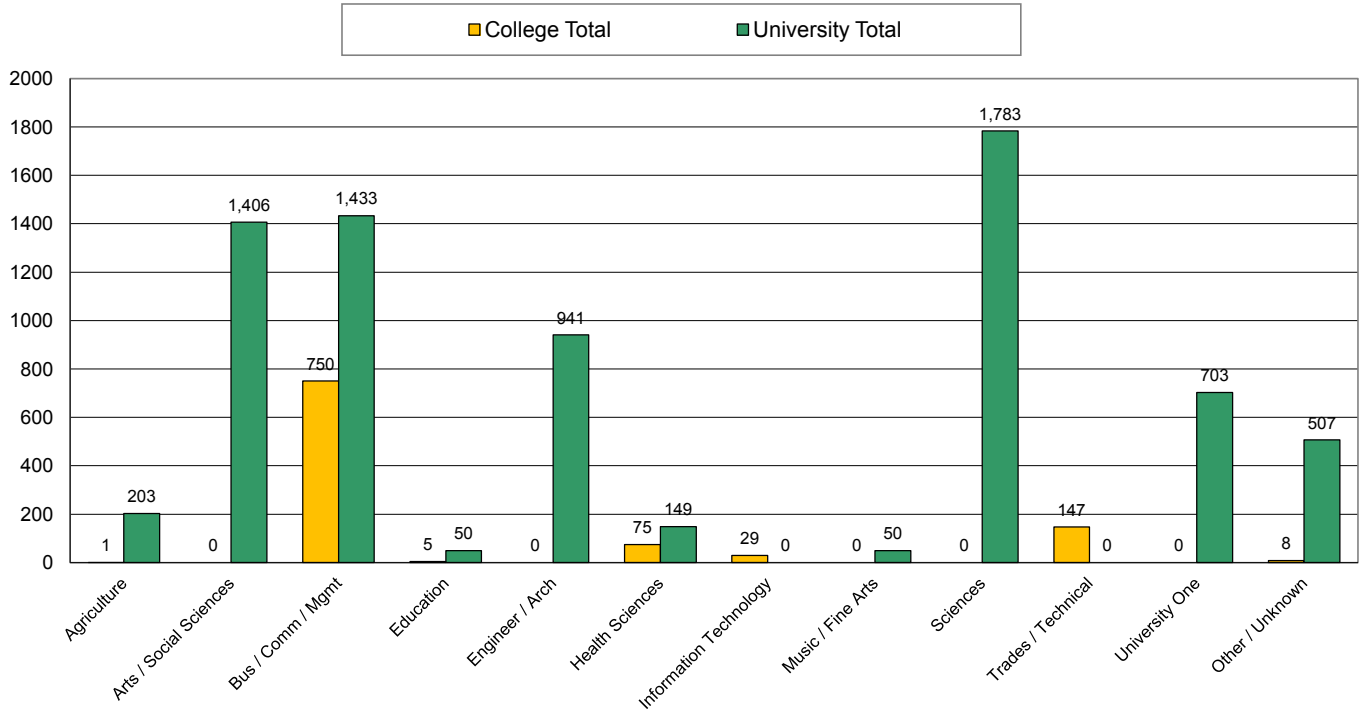
Total Post-Secondary International Students	Assiniboine Community College	l'Ecole Technique et Professionnelle Red River College (1)	MB Institute of Trades and Technology	Boon University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
Agriculture	1									203		204	2.5%
Arts / Social Sciences				2	82	23	309	43	15	777	155	1,406	17.1%
Business / Commerce / Mgmt	76	77	597				824	12	27	429	141	2,183	26.5%
Education		5			15					20	15	55	0.7%
Engineering / Architecture							362			579		941	11.4%
Health Sciences		7	68		19					127	3	224	2.7%
Information Technology	6	23										29	0.4%
Music / Fine Arts					10					40		50	0.6%
Sciences					33		840		8	795	107	1,783	21.6%
Trades / Technical	1		146									147	1.8%
University One									72	631		703	8.5%
Other / Unknown	1		7				212	5		204	86	515	6.3%
TOTAL STUDENTS	85	112	818	2	159	23	2,547	60	122	3,805	507	8,240	100.0%

(1) Enrolment figures for Red River College include students enrolled in ESL/EAL programs.

Table 2b. Graduate Student Enrolment by Institution & Area of Study

Graduate Students	Brandon University	Providence University College	University of Manitoba	University of Winnipeg	Total Grad Students	% of Total
Agriculture			106		106	10.9%
Arts / Social Sciences		4	133	16	161	16.5%
Business / Commerce / Mgmt			29		29	3.0%
Education		5	19		24	2.5%
Engineering / Architecture			253		253	26.0%
Health Sciences			105		105	10.8%
Information Technology						
Music / Fine Arts		4	6		10	1.0%
Sciences			220	19	239	24.6%
Trades / Technical						
University One						
Other / Unknown			46		46	4.7%
TOTAL GRAD STUDENTS		13	917	35	973	100.0%

Total Post-Secondary Enrolment by Area of Study



Total University Enrolment by Area of Study

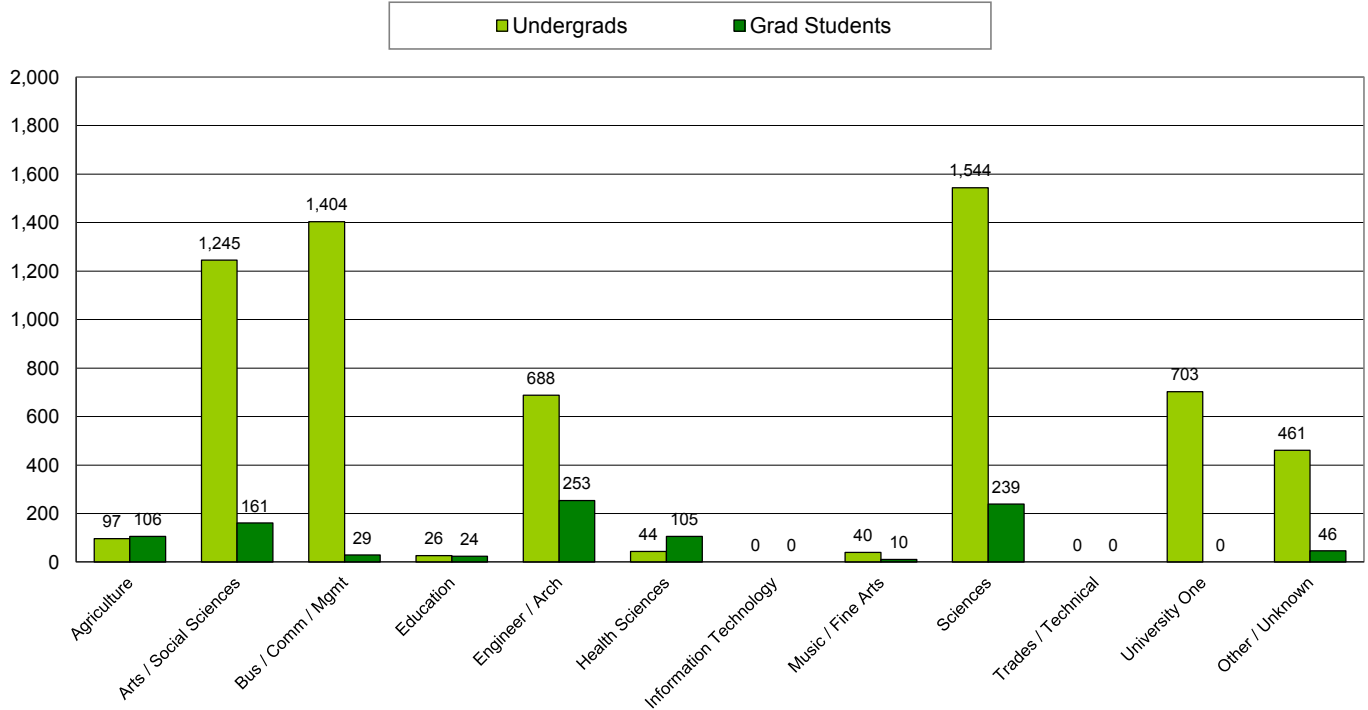


Table 3a. Total Enrolment by Institution & Country of Origin

Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total	
Africa	8	105	42		1	35	9	539	4	114	685	65	1,607	19.5%
Algeria										1	1	2	0.0%	
Benin			1							1		2	0.0%	
Botswana										4		4	0.0%	
Burkina Faso		1							5	4	1	11	0.1%	
Burundi		3							2	1	3	9	0.1%	
Cameroon		4			1				3			8	0.1%	
Congo		2	1				1	1	6		1	12	0.1%	
Cote-d'Ivoire		5	1						7	1		14	0.2%	
Gabon									1			1	0.0%	
Gambia							1			1		2	0.0%	
Ghana			1		2		5	1		31	3	43	0.5%	
Guinea		2							4	1		7	0.1%	
Kenya			2			4	47			36	5	94	1.1%	
Lesotho											1	1	0.0%	
Madagascar			1									1	0.0%	
Malawi										1		1	0.0%	
Mali		11	1				2		24	3		41	0.5%	
Mauritania									2	1		3	0.0%	
Mauritius			2				21			9	1	33	0.4%	
Morocco		28	2						28	5	1	64	0.8%	
Mozambique							3			2		5	0.1%	
Nigeria	8		22	1	28	3	258			495	34	849	10.3%	
Rwanda			1				17			3	1	22	0.3%	
Senegal		40			1		2		29	5	1	78	0.9%	
South Africa			3							4	1	8	0.1%	
Tanzania					1		64	1			2	68	0.8%	
Togo											1	1	0.0%	
Tunisia		9					5		3	2		19	0.2%	
Uganda							1			7	4	12	0.1%	
Zambia			2				48			34	2	86	1.0%	
Zimbabwe			2		2	2	64	1		33	2	106	1.3%	
Asia	27		671		78	5	1,808	40		2,327	264	5,220	63.3%	
Afghanistan							2			1		3	0.0%	
Bangladesh	1		5		5		105			90	7	213	2.6%	
China, People's Republic	16		368		45	3	805	2		1,621	140	3,000	36.4%	
Hong Kong			2				125	2		67	13	209	2.5%	
India	4		188		1	1	144	2		191	35	566	6.9%	
Indonesia			1				13			12		26	0.3%	
Japan			9		1		3			24	19	56	0.7%	
Korea, South	2		37		5	1	59	28		73	12	217	2.6%	
Macau							6			3		9	0.1%	
Malaysia							7			41	7	55	0.7%	
Mongolia							4			3	1	8	0.1%	
Myanmar								2		1		3	0.0%	
Nepal			1							11		12	0.1%	
Pakistan	1		14		4		404	2		74	11	510	6.2%	
Philippines	3		8		1		8	2		5	4	31	0.4%	
Singapore							5			3		8	0.1%	
Sri Lanka			2		2		6			37	7	54	0.7%	
Taiwan			7		10		12			14	3	46	0.6%	
Thailand							2			7		9	0.1%	
Vietnam			29		4		98			49	5	185	2.2%	

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

Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
Europe	8	5	18		8	2	49	3	6	166	67	332	4.0%
Armenia										1		1	0.0%
Austria					1							1	0.0%
Azerbaijan							5			4		9	0.1%
Belarus			1									1	0.0%
Belgium										3		3	0.0%
Croatia			2									2	0.0%
Czech Republic											2	2	0.0%
Estonia											10	10	0.1%
Finland					1					2		3	0.0%
France		5							6	23	1	35	0.4%
Germany			1		2	1		1		25	37	67	0.8%
Hungary										1		1	0.0%
Iceland					1					1		2	0.0%
Italy							2			1		3	0.0%
Kazakhstan							9			5		14	0.2%
Kyrgyzstan							3			1		4	0.0%
Moldova											4	4	0.0%
Netherlands								1		7		8	0.1%
Norway										1	1	2	0.0%
Poland										1		1	0.0%
Portugal			1				4			1		6	0.1%
Romania										2		2	0.0%
Russia	1		4		2		11			32	4	54	0.7%
Serbia										1		1	0.0%
Slovakia			1									1	0.0%
Spain	1		4				2			4		11	0.1%
Sweden										5		5	0.1%
Switzerland					1		3			4		8	0.1%
Tajikistan										15		15	0.2%
Ukraine	6		4			1	6	1		17	2	37	0.4%
United Kingdom							4			8	5	17	0.2%
Uzbekistan										1	1	2	0.0%
Middle East			12		2		71	1	1	287	37	411	5.0%
Bahrain							1			1		2	0.0%
Egypt			1		1		5			20	2	29	0.4%
Eritrea							5					5	0.1%
Ethiopia							2			4	6	12	0.1%
Iran			1				8	1		156	3	169	2.1%
Iraq							3		1	2		6	0.1%
Israel			1							5	2	8	0.1%
Jordan							14			7	1	22	0.3%
Kuwait										4		4	0.0%
Lebanon			1				1			4	3	9	0.1%
Libya			1							7		8	0.1%
Oman (Muscat)							3			1		4	0.0%
Palestine (Gaza & West Bank)							3			1	1	5	0.1%
Qatar										1		1	0.0%
Saudi Arabia			2				4			57	14	77	0.9%
Sudan					1		5					6	0.1%
Syria			1				1			2		4	0.0%
Turkey			3				16			12	2	33	0.4%
United Arab Emirates										3		3	0.0%
Yemen			1								3	4	0.0%

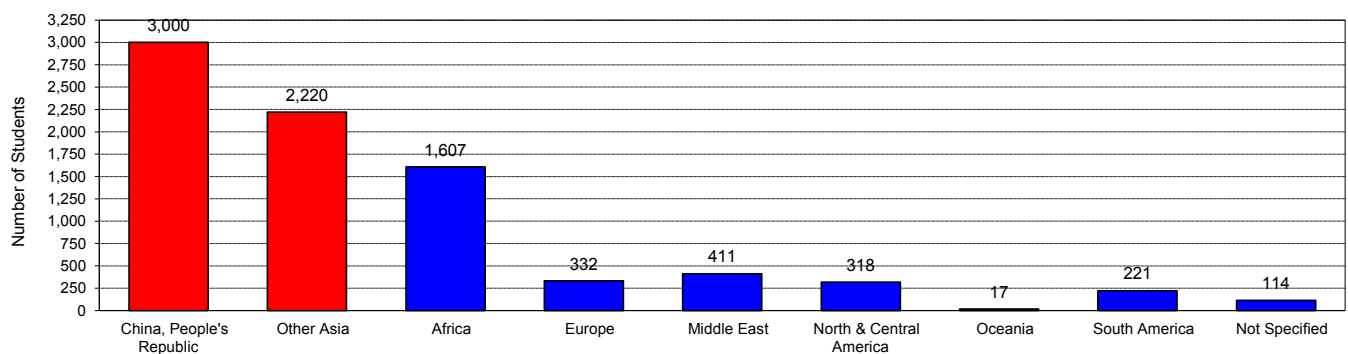
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Table 3a. Total Enrolment by Institution & Country of Origin (Continued)

Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle	Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
North & Central America	34	2	14		1	20	3	15	10	1	180	38	318	3.9%
Bahamas						1		2			2	2	7	0.1%
Barbados											1		1	0.0%
Belize												1	1	0.0%
Costa Rica						1					1		2	0.0%
Cuba									1				1	0.0%
El Salvador			1									2	3	0.0%
Grenada												1	1	0.0%
Haiti		1									1	5	7	0.1%
Jamaica	10		2								5	2	19	0.2%
Mexico	2	1	4			4		13	2		39	4	69	0.8%
Panama											1		1	0.0%
Saint Vincent & Grenadines			1									1	2	0.0%
Trinidad-Tobago											3	2	5	0.1%
United States	22		6		1	14	3		7	1	127	18	199	2.4%
Oceania			1			6					4	6	17	0.2%
Australia			1			1					3	6	11	0.1%
New Zealand						5					1		6	0.1%
South America	2		58			9	4	12	2		123	11	221	2.7%
Brazil	1		46			6		3	2		93	7	158	1.9%
Chile			2				1				2		5	0.1%
Colombia			1					1			8	1	11	0.1%
Ecuador			1					3			1		5	0.1%
Guyana						1					2	3	6	0.1%
Paraguay			1				3				6		10	0.1%
Peru	1					2		3			2		8	0.1%
Uruguay											1		1	0.0%
Venezuela			7					2			8		17	0.2%
Not Specified	6		2			1		53			33	19	114	1.4%
TOTAL STUDENTS	85	112	818		2	159	23	2,547	60	122	3,805	507	8,240	100.0%

Students originating from Asia number 5,220, or 63.3% of post-secondary international students in 2013/14. Africa provided the next greatest number of international students with 1,607 (19.5%), followed by the Middle East with 411 (5.0%).

Post-Secondary International Student Enrolment by World Region (2013/14)



International Post-Secondary Students: Manitoba 2013/14

Table 3b. Total Enrolment by Top Countries of Origin (90 or More Students)

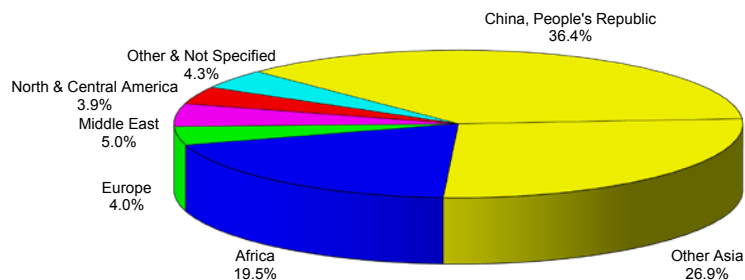
Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle	Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
China, People's Republic	16		368			45	3	805	2		1,621	140	3,000	36.4%
Nigeria	8		22		1	28	3	258			495	34	849	10.3%
India	4		188			1	1	144	2		191	35	566	6.9%
Pakistan	1		14			4		404	2		74	11	510	6.2%
Korea, South	2		37			5	1	59	28		73	12	217	2.6%
Bangladesh	1		5			5		105			90	7	213	2.6%
Hong Kong			2					125	2		67	13	209	2.5%
United States	22		6		1	14	3		7	1	127	18	199	2.4%
Vietnam			29			4		98			49	5	185	2.2%
Iran			1					8	1		156	3	169	2.1%
Brazil	1		46			6		3	2		93	7	158	1.9%
Zimbabwe			2			2	2	64	1		33	2	106	1.3%
Kenya			2				4	47			36	5	94	1.1%
SUB-TOTAL	55		722		2	114	17	2,120	47	1	3,105	292	6,475	78.6%
% Share of Institution Total	64.7%		88.3%		100.0%	71.7%	73.9%	83.2%	78.3%	0.8%	81.6%	57.6%	78.6%	
TOTAL STUDENTS	85	112	818		2	159	23	2,547	60	122	3,805	507	8,240	100.0%

Thirteen countries had at least 90 students attending post-secondary studies in Manitoba in 2013/14. These 13 countries accounted for 6,745 (78.6%) of the total international student enrolment. Included in the list are 7 countries from Asia, and 3 from Africa.

Table 3c. Summary of Enrolment by World Region

Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle	Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment	% of Total
China, People's Republic	16		368			45	3	805	2		1,621	140	3,000	36.4%
Other Asia	11		303			33	2	1,003	38		706	124	2,220	26.9%
Africa	8	105	42		1	35	9	539	4	114	685	65	1,607	19.5%
Europe	8	5	18			8	2	49	3	6	166	67	332	4.0%
Middle East			12			2		71	1	1	287	37	411	5.0%
North & Central America	34	2	14		1	20	3	15	10	1	180	38	318	3.9%
Oceania			1			6					4	6	17	0.2%
South America	2		58			9	4	12	2		123	11	221	2.7%
Not Specified	6		2			1		53			33	19	114	1.4%
Total Enrolment	85	112	818		2	159	23	2,547	60	122	3,805	507	8,240	100%

**Post-Secondary International Student Enrolment
Percent Share by World Region (2013/14)**



International Post-Secondary Students: Manitoba 2013/14

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

Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle	Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment
Asia	0.5%		12.9%			1.5%	0.1%	34.6%	0.8%		44.6%	5.1%	100.0%
Africa	0.5%	6.5%	2.6%		0.1%	2.2%	0.6%	33.5%	0.2%	7.1%	42.6%	4.0%	100.0%
Europe	2.4%	1.5%	5.4%			2.4%	0.6%	14.8%	0.9%	1.8%	50.0%	20.2%	100.0%
Middle East			2.9%			0.5%		17.3%	0.2%	0.2%	69.8%	9.0%	100.0%
North & Central America	10.7%	0.6%	4.4%		0.3%	6.3%	0.9%	4.7%	3.1%	0.3%	56.6%	11.9%	100.0%
Oceania			5.9%			35.3%					23.5%	35.3%	100.0%
South America	0.9%		26.2%			4.1%	1.8%	5.4%	0.9%		55.7%	5.0%	100.0%
Not Specified	5.3%		1.8%			0.9%		46.5%			28.9%	16.7%	100.0%
TOTAL STUDENTS	1.0%	1.4%	9.9%		0.0%	1.9%	0.3%	30.9%	0.7%	1.5%	46.2%	6.2%	100.0%

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

Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle	Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment
Asia	31.8%		82.0%			49.1%	21.7%	71.0%	66.7%		61.2%	52.1%	63.3%
Africa	9.4%	93.8%	5.1%		50.0%	22.0%	39.1%	21.2%	6.7%	93.4%	18.0%	12.8%	19.5%
Europe	9.4%	4.5%	2.2%			5.0%	8.7%	1.9%	5.0%	4.9%	4.4%	13.2%	4.0%
Middle East			1.5%			1.3%		2.8%	1.7%	0.8%	7.5%	7.3%	5.0%
North & Central America	40.0%	1.8%	1.7%		50.0%	12.6%	13.0%	0.6%	16.7%	0.8%	4.7%	7.5%	3.9%
Oceania			0.1%			3.8%					0.1%	1.2%	0.2%
South America	2.4%		7.1%			5.7%	17.4%	0.5%	3.3%		3.2%	2.2%	2.7%
Not Specified	7.1%		0.2%			0.6%		2.1%			0.9%	3.7%	1.4%
TOTAL STUDENTS	100.0%	100.0%	100.0%		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 5. Actual and Targeted International Student Enrolment

Total Post-Secondary International Students	Assiniboine Community College	École Technique et Professionnelle	Red River College	MB Institute of Trades and Technology	Booth University College	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total
2013/14 Total Enrolment	85	112	818		2	159	23	2,547	60	122	3,805	507	8,240
2013/14 Target Enrolment	60	100	710			146		2,414	80	110	3,286	525	7,431
% of Target Achieved	141.7%	112.0%	115.2%			108.9%		105.5%	75.0%	110.9%	115.8%	96.6%	110.9%

Table 6. Total Estimated Manitoba Based Expenditures

Average Student Expenditures per Month ⁽¹⁾	\$1,025
Student Expenditures per Year ⁽²⁾	\$8,200
Total Post-Secondary Students	8,240
Estimated Total Living Expenditures in Manitoba ⁽³⁾	\$67.57 Million
Tuition & Educational Fees Paid to Institutions ⁽⁴⁾	+ \$59.61 Million
Total Estimated Manitoba Based Expenditures	= \$127.18 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 \$1,025. The figure is published by Employment and Social Development Canada (ESDC) as the Monthly Budget for Single Student Living Allowances in Manitoba in 2013/14, and includes \$445 for shelter, \$228 for grocery purchases, \$79 for local transportation and \$273 for other expenditures.

(2) The monthly student expenditure figure of \$1,025 translates to \$8,200 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 (\$67.57 million) is estimated by multiplying total reported students by their estimated yearly expenditure.A1

(4) "Tuition & Educational Fees Paid to Institutions" (\$59.61 million) is as reported to the Manitoba International Education Branch of Manitoba Education and Training.

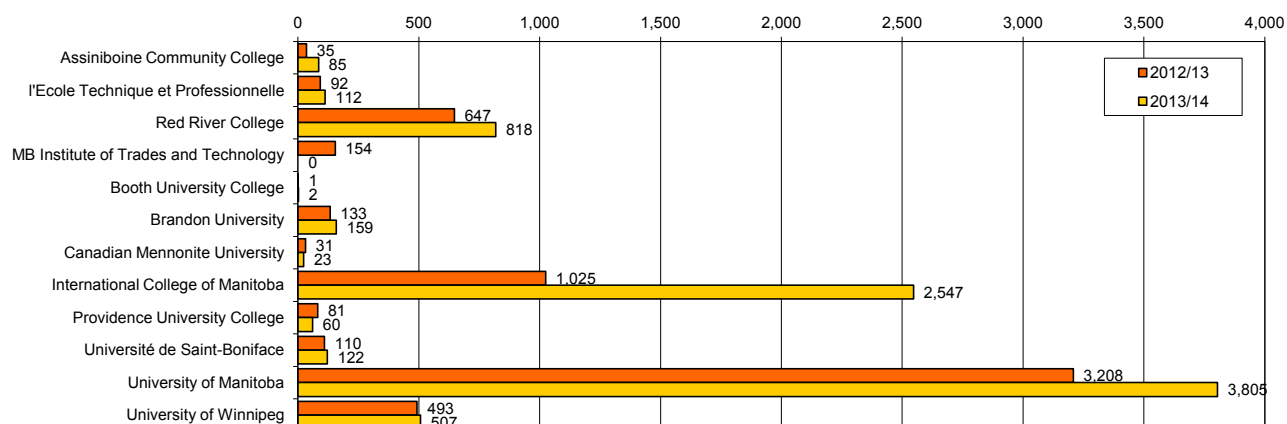
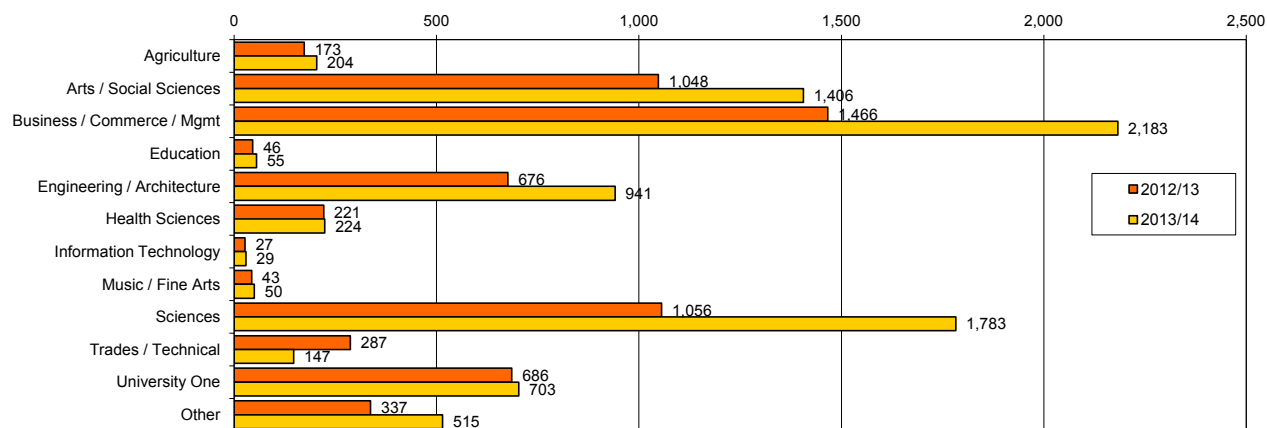
International Post-Secondary Students: Manitoba 2012/13 - 2013/14

Table A: Total Enrolment & Enrolment Targets by Institution

Total Post-Secondary International Students	Assiniboine Community College	l'Ecole Technique et Professionnelle	Red River College ⁽¹⁾	MB Institute of Trades and Technology	Booth University College ⁽²⁾	Brandon University	Canadian Mennonite University	International College of Manitoba	Providence University College	Université de Saint-Boniface	University of Manitoba	University of Winnipeg	Total Enrolment
Actual Enrolment													
2012/13 Enrolment	35	92	647	154	1	133	31	1,025	81	110	3,208	493	6,010
2013/14 Enrolment	85	112	818	0	2	159	23	2,547	60	122	3,805	507	8,240
Net Change	50	20	171	-154	1	26	-8	1,522	-21	12	597	14	2,230
Percent Change	142.9%	21.7%	26.4%	-100.0%	100.0%	19.5%	-25.8%	148.5%	-25.9%	10.9%	18.6%	2.8%	37.1%
Target Enrolment													
2012/13 Targets	33	90	545			148		989	105	100	2,858	520	5,388
2013/14 Targets	60	100	710			146		2,414	80	110	3,286	525	7,431
Net Change	27	10	165			-2		1,425	-25	10	428	5	2,043
Percent Change	81.8%	11.1%	30.3%			-1.4%		144.1%	-23.8%	10.0%	15.0%	1.0%	37.9%

(1) International student enrolment figures for Red River College include students enrolled in ESL/EAL programs.

Total International Student Enrolment by Institution


Total Post-Secondary Enrolment by Area of Study ⁽¹⁾


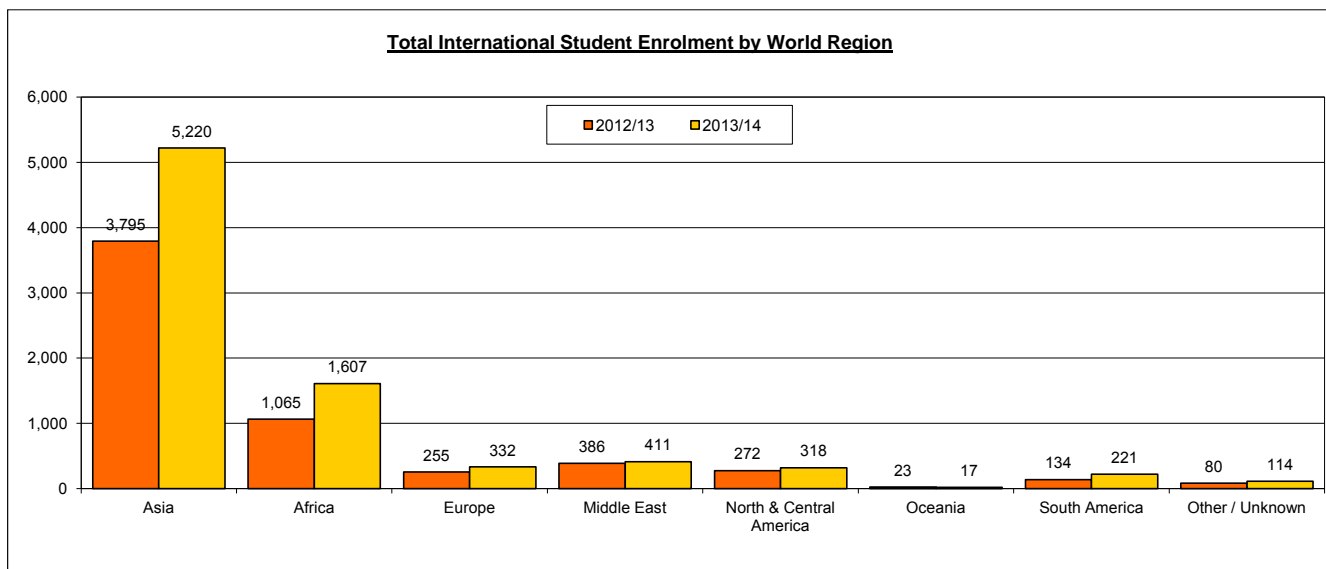
(1) Area of Study data for Red River College does not provide unique student counts, as students may be enrolled in more than one program. Therefore sum of total enrolments by area of study may be greater than actual enrolment presented in Table A.

International Post-Secondary Students: Manitoba 2012/13 - 2013/14

Table B: Total Post-Secondary Enrolment by Area of Study						
	2012/13		2013/14		Net Change	Percent Change
Agriculture	2.9%	173	2.5%	204	31	17.9%
Arts / Social Sciences	17.3%	1,048	17.1%	1,406	358	34.2%
Business / Commerce / Mgmt	24.2%	1,466	26.5%	2,183	717	48.9%
Education	0.8%	46	0.7%	55	9	19.6%
Engineering / Architecture	11.1%	676	11.4%	941	265	39.2%
Health Sciences	3.6%	221	2.7%	224	3	1.4%
Information Technology	0.4%	27	0.4%	29	2	7.4%
Music / Fine Arts	0.7%	43	0.6%	50	7	16.3%
Sciences	17.4%	1,056	21.6%	1,783	727	68.8%
Trades / Technical	4.7%	287	1.8%	147	-140	-48.8%
University One	11.3%	686	8.5%	703	17	2.5%
Other	5.6%	337	6.3%	515	178	52.8%
POST-SECONDARY TOTAL ⁽¹⁾	100.0%	6,066	100.0%	8,240	2,174	35.8%

(1) Area of Study data for Red River College does not provide unique student counts, as students may be enrolled in more than one program. Therefore sum of total enrolments by area of study may be greater than actual enrolment presented in Table A.

Table C: Distribution of Students by World Region									
	Asia	Africa	Europe	Middle East	North & Central America	Oceania	South America	Other / Unknown	Total
Total Enrolment by World Region									
2012/13 Enrolment	3,795	1,065	255	386	272	23	134	80	6,010
2013/14 Enrolment	5,220	1,607	332	411	318	17	221	114	8,240
Net Change	1,425	542	77	25	46	-6	87	34	2,230
Percent Change	37.5%	50.9%	30.2%	6.5%	16.9%	-26.1%	64.9%	42.5%	37.1%



International Post-Secondary Students: Manitoba 2012/13 - 2013/14

Table D: Total Estimated Manitoba Based Expenditures				
	2012/13	2013/14	Net Change	Percent Change
Total Post-Secondary Enrolment	6,010	8,240	2,230	37.1%
Estimated Expenditure per Student	\$8,016	\$8,200	\$184	2.3%
Estimated Student Living Expenditures ⁽¹⁾ (\$Millions)	\$48.18	\$67.57	\$19.39	40.3%
Tuition & Educational Fees Paid ⁽²⁾ (\$Millions)	\$46.93	\$59.61	\$12.68	27.0%
Total Estimated Manitoba Based Expenditures (\$Millions)	\$95.11	\$127.18	\$32.07	33.7%

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) "Estimated Student Living Expenditures" is the product of FTE Enrolment multiplied by their Estimated Expenditures (sourced to Employment and Social Development Canada).

(2) "Tuition & Educational Fees Paid" is as reported to the Manitoba International Education Branch of Manitoba Education and Training.

Section III

ELEMENTARY AND SECONDARY SECTOR INDEPENDENT SCHOOLS* AND SCHOOL DIVISIONS

Independent schools and school divisions were asked to provide information on full-year and single-semester tuition-paying international students, exchange, and other non-tuition paying international students, as well as EAL (English as an Additional Language) and short-term study international students.

Throughout this section, there are references to the public and the funded independent school systems. These terms are used to describe publicly funded school divisions, and independent schools that receive public funds. Non-funded independent schools are not eligible to enroll international students. Enrolment is further divided into segments representing Kindergarten to Grade 4 (Early Years), Grades 5-8 (Middle Years) and each of Grades 9, 10, 11 and 12 (Senior Years). Of the total number of international students in Manitoba (11,174) in 2013/14, 1,431 or 12.8% attended Kindergarten to Grade 12 schools.

----- **Capacity and Targets** -----

Table 6 outlining institutional targets for international student enrolment reflects the potential capacity of independent schools and public school divisions to enroll additional international students. This serves as a key indicator for future growth of the international education sector in Manitoba at the K-12 level.

Estimating capacity in the elementary/secondary sector is a complex task based on many variables including domestic requirements, schools of choice, and availability of qualified teachers, sufficient physical space and infrastructure, and homestays.

Independent schools and public school divisions were asked to assess their potential capacity to admit additional international students into their classrooms. Their target was then compared with their actual international student enrollment to determine their success in reaching their own enrolment targets.

----- **Economic Impact** -----

Independent schools and public school divisions 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 tables outlining *Student Fees and Economic Impact*.

This data, along with estimated student expenditures, was used to estimate the value of the K-12 component of the international education sector to the provincial economy in 2013/14.

* 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 funds schools based upon guidelines (see http://www.edu.gov.mb.ca/k12/schools/ind/funded/leg_reg.html for regulations and policies).

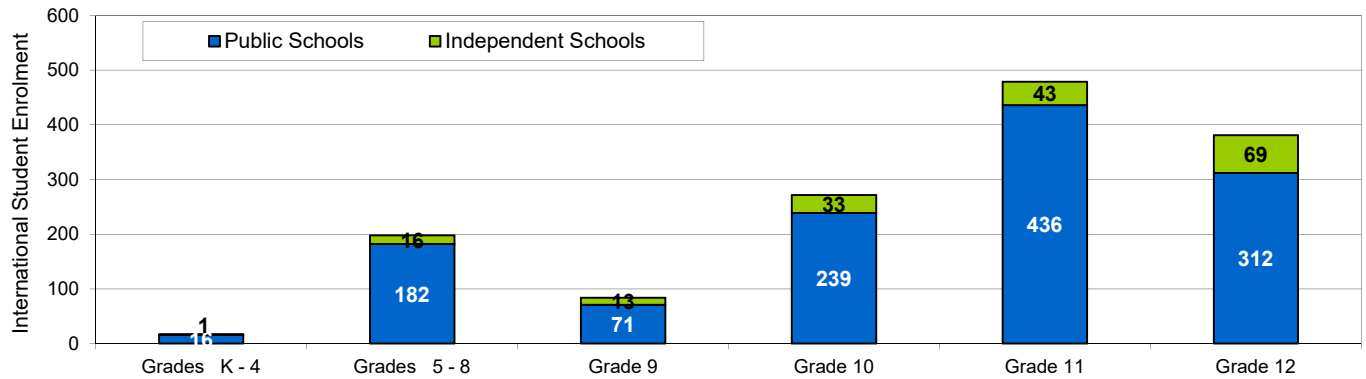
International Elementary/Secondary School Students: Manitoba 2013/14

Table 1. Total Enrolment by Grade Level; Public & Private School Systems								
	Grades K - 4	Grades 5 - 8	Grade 9	Grade 10	Grade 11	Grade 12	Total Enrolment	% of Total
<u>PUBLIC SCHOOL SYSTEM</u>								
Beautiful Plains		3		1	2	3	9	0.6%
Border Land						1	1	0.1%
Brandon		1		4	2	1	8	0.6%
D.S.F.M.		1		2	2	3	8	0.6%
Flin Flon					1		1	0.1%
Fort La Bosse		3	2	1	20		26	1.8%
Hanover				6	3		9	0.6%
Kelsey						1	1	0.1%
Lord Selkirk		1		7	13	5	26	1.8%
Louis Riel	5	21	16	40	63	104	249	17.4%
Mountain View		80	7	4	38	8	137	9.6%
Park West				2	10		12	0.8%
Pembina Trails	8	25	21	77	61	68	260	18.2%
Portage La Prairie					1	2	3	0.2%
River East Transcona	2	3	9	33	101	46	194	13.6%
Rolling River		2		1	15	2	20	1.4%
Seven Oaks				4	6	2	12	0.8%
Southwest Horizon		5	2	3	13	1	24	1.7%
St. James-Assiniboia		21	9	46	60	45	181	12.6%
Sunrise				2	13	3	18	1.3%
Turtle Mountain		1		3	8		12	0.8%
Winnipeg	1	5	2	1		2	11	0.8%
Non-Reporting Schools ⁽¹⁾		10	3	2	4	15	34	2.4%
PUBLIC SCHOOL SYSTEM TOTAL	16	182	71	239	436	312	1,256	87.8%
% of Total	1.3%	14.5%	5.7%	19.0%	34.7%	24.8%	100.0%	
<u>INDEPENDENT SCHOOLS</u>								
Balmoral Hall School		5	5	8	6	10	34	2.4%
Holy Cross School		1					1	0.1%
Mennonite Brethren Collegiate Inst.		1	1	4	4		10	0.7%
Mennonite Collegiate Institute			1	1	3	2	7	0.5%
St. Ignatius School		1					1	0.1%
St. John's-Ravenscourt School				6	7	4	17	1.2%
St. Maurice School						1	1	0.1%
Steinbach Christian High School		1	1			1	3	0.2%
Non-Reporting Schools ⁽¹⁾	1	7	5	14	23	51	101	7.1%
INDEPENDENT SCHOOLS TOTAL	1	16	13	33	43	69	175	12.2%
% of Total	0.6%	9.1%	7.4%	18.9%	24.6%	39.4%	100.0%	
TOTAL INTERNATIONAL STUDENTS	17	198	84	272	479	381	1,431	100.0%
% of Total	1.2%	13.8%	5.9%	19.0%	33.5%	26.6%	100.0%	

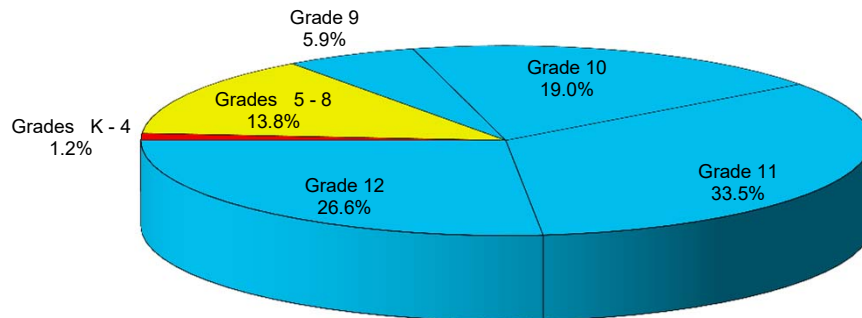
Thank you also to the many schools and school divisions which responded to the survey, but had no international students enrolled in 2013/14.

(1) Enrolment for Non-Reporting Institutions is based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2013).

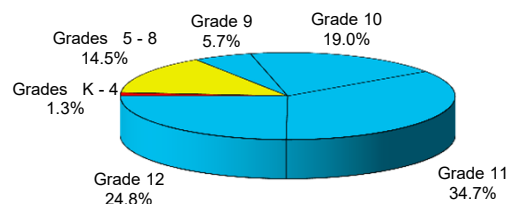
Enrolment by Grade Level (2013/14)



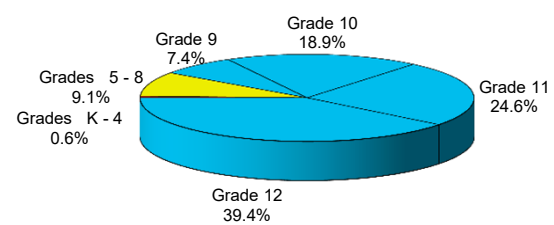
**Enrolment by Grade Level
All Schools (2013/14)**



Public Schools



Independent Schools



	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
<u>PUBLIC SCHOOL SYSTEM</u>									
Beautiful Plains	1	2	3		3		9	2.8	0.3%
Border Land					1		1		
Brandon	5				3		8	5.0	0.6%
D.S.F.M.	2	4			2		8	4.4	0.5%
Flin Flon					1		1		
Fort La Bosse		12	5		9		26	8.3	1.0%
Hanover	1				8		9	1.0	0.1%
Kelsey					1		1		
Lord Selkirk	10	15	1				26	17.7	2.0%
Louis Riel	112	89	14		34		249	168.2	19.4%
Mountain View	16	37	58	25	1		137	43.1	5.0%
Park West	7				5		12	7.0	0.8%
Pembina Trails	137	72	27	23	1		260	182.4	21.0%
Portage La Prairie	1	1			1		3	1.6	0.2%
River East Transcona	64	104	5		21		194	127.6	14.7%
Rolling River	1	15	3		1		20	10.6	1.2%
Seven Oaks	8	2	1		1		12	9.1	1.0%
Southwest Horizon	1	14	9				24	11.1	1.3%
St. James-Assiniboia	58	71	51		1		181	110.3	12.7%
Sunrise	6	10			2		18	12.0	1.4%
Turtle Mountain	1	8	3				12	6.3	0.7%
Winnipeg	6	4			1		11	8.4	1.0%
Non-Reporting School Divisions ⁽¹⁾						34	34	17.0	2.0%
PUBLIC SCHOOL SYSTEM TOTAL % of Total	437 34.8%	460 36.6%	180 14.3%	48 3.8%	97 7.7%	34 2.7%	1,256 100.0%	754	86.9%
<u>INDEPENDENT SCHOOLS</u>									
Balmoral Hall School	31	3					34	33.1	3.8%
Holy Cross School	1						1	1.0	0.1%
Mennonite Brethren Collegiate Inst.	4		5		1		10	5.5	0.6%
Mennonite Collegiate Institute	7						7	7.0	0.8%
St. Ignatius School	1						1	1.0	0.1%
St. John's-Ravenscourt School	17						17	17.0	2.0%
St. Maurice School	1						1	1.0	0.1%
Steinbach Christian High School	1	2					3	2.0	0.2%
Non-Reporting Schools ⁽¹⁾					9	92	101	46.0	5.3%
INDEPENDENT SCHOOLS TOTAL % of Total	63 36.0%	5 2.9%	5 2.9%		10 5.7%	92 52.6%	175 100.0%	114	13.1%
TOTAL INTERNATIONAL STUDENTS % of Total	500 34.9%	465 32.5%	185 12.9%	48 3.4%	107 7.5%	126 8.8%	1,431 100.0%	868	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.

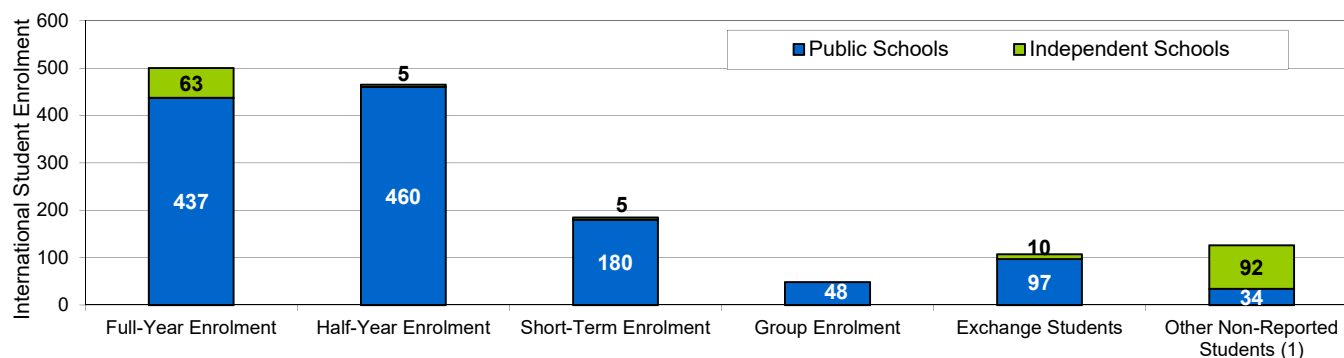
Group Enrolment: Students enrolled as part of a group for a specialized program (e.g., summer program).

Exchange Students: Inbound international exchange students (non-fee paying).

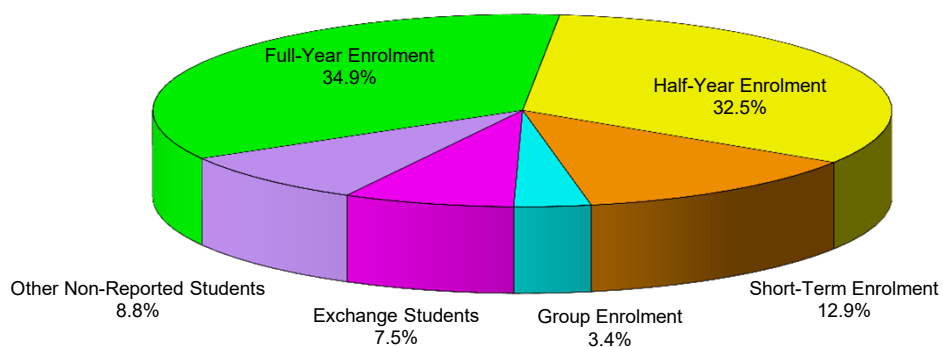
Full-Time Equivalent Enrolment: Estimation of full-time equivalency does not include exchange students.

(1) Enrolment for Non-Reporting Institutions is based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2013). 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.

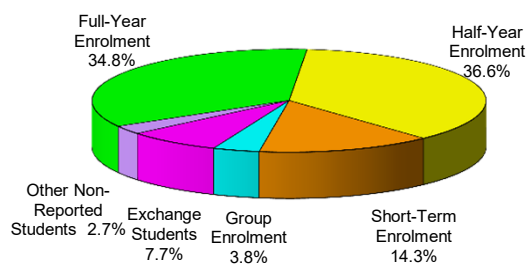
Total Enrolment by Length/Type (2013/14)



**Total Enrolment by Length/Type
All Schools (2013/14)**



Public Schools



Independent Schools

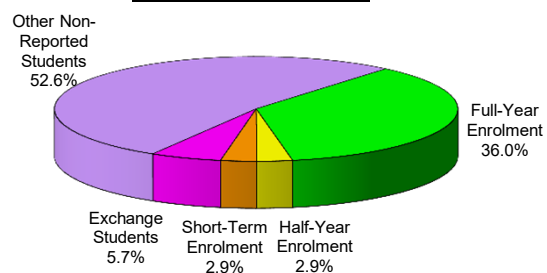
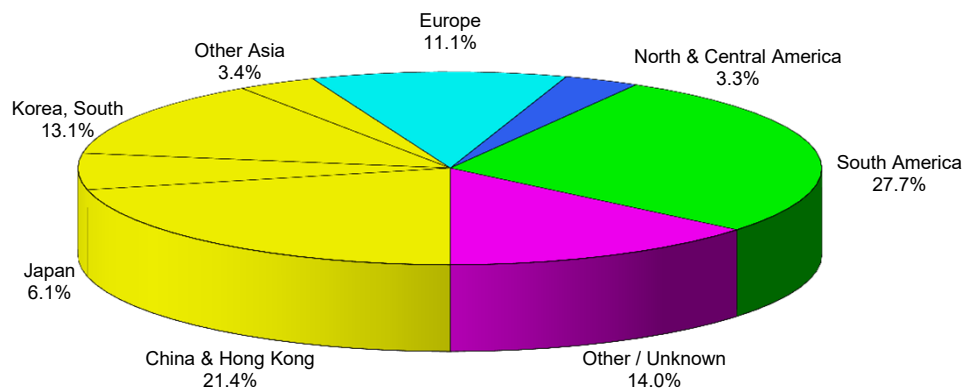


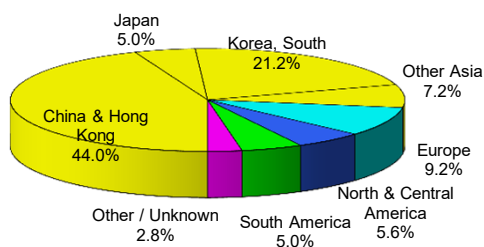
Table 3a. Country of Origin by Length/Type of Enrolment								
	Full-Year Enrolment	Half-Year Enrolment	Short-Term Enrolment	Group Enrolment	Exchange Students	Other Non- Reported Students ⁽¹⁾	Total International Students	% of Total
AFRICA	10	10	1		2		23	1.6%
Mali	1						1	0.1%
Morocco		1					1	0.1%
Nigeria	3	6	1				10	0.7%
Rwanda	1						1	0.1%
Senegal	4	2			1		7	0.5%
South Africa	1						1	0.1%
Tunisia		1			1		2	0.1%
ASIA	387	136	25	48	33		629	44.0%
China, People's Republic	195	73	7		2		277	19.4%
Hong Kong	25	4					29	2.0%
India		1					1	0.1%
Japan	25	12	2	23	25		87	6.1%
Korea, North		1					1	0.1%
Korea, South	106	36	15	25	5		187	13.1%
Macau		1					1	0.1%
Malaysia	4						4	0.3%
Maldives	1						1	0.1%
Nepal	1						1	0.1%
Pakistan	1						1	0.1%
Sri Lanka	3						3	0.2%
Taiwan	5	1					6	0.4%
Thailand	8	4	1		1		14	1.0%
Vietnam	13	3					16	1.1%
EUROPE	46	68	29		16		159	11.1%
Austria		4					4	0.3%
Belgium	3	2	1				6	0.4%
Czech Republic	3	3	1				7	0.5%
Finland	3						3	0.2%
France			1		3		4	0.3%
Germany	19	44	23		1		87	6.1%
Italy	4	10	1				15	1.0%
Netherlands		1	1				2	0.1%
Russia	4	1					5	0.3%
Slovakia	6	3					9	0.6%
Spain	3		1		11		15	1.0%
Switzerland					1		1	0.1%
Ukraine	1						1	0.1%
MIDDLE EAST	2						2	0.1%
Egypt	2						2	0.1%
NORTH & CENTRAL AMERICA	28	16	2		1		47	3.3%
Guadeloupe					1		1	0.1%
Mexico	28	16	2				46	3.2%
OCEANIA	2						2	0.1%
Australia	2						2	0.1%
SOUTH AMERICA	25	235	128		8		396	27.7%
Brazil	20	227	15				262	18.3%
Chile			29				29	2.0%
Colombia	1	6	84				91	6.4%
Ecuador					8		8	0.6%
Venezuela	4	2					6	0.4%
NOT SPECIFIED ⁽¹⁾					47	126	173	12.1%
TOTAL	500	465	185	48	107	126	1,431	100.0%

(1) Estimate of students from Non-Reporting Institutions is based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2013), which provides a breakdown between Exchange Students (9) and Other International Students (126).

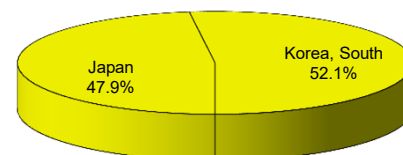
Enrolment by World Region
All International Students (2013/14)



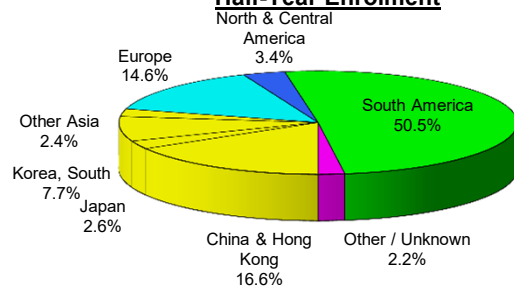
Full-Year Enrolment



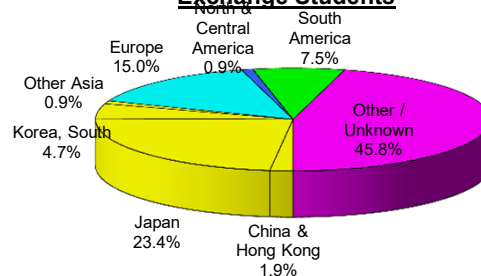
Group Enrolment



Half-Year Enrolment



Exchange Students



Short-Term Enrolment

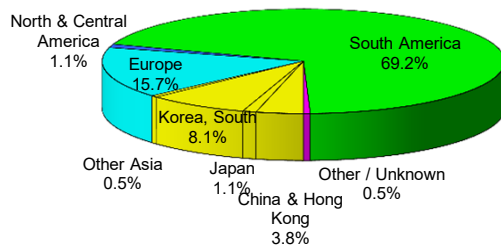


Table 3b. Top 10 Countries of Origin

	Full-Year Enrolment	Half-Year Enrolment	Short-Term Enrolment	Group Enrolment	Exchange Students	Other Non- Reported Students	Total International Students	% of Total
China, People's Republic	195	73	7		2		277	19.4%
Brazil	20	227	15				262	18.3%
Korea, South	106	36	15	25	5		187	13.1%
Colombia	1	6	84				91	6.4%
Japan	25	12	2	23	25		87	6.1%
Germany	19	44	23		1		87	6.1%
Mexico	28	16	2				46	3.2%
Hong Kong	25	4					29	2.0%
Chile			29				29	2.0%
Vietnam	13	3					16	1.1%
SUBTOTAL	432	421	177	48	33		1,111	77.6%
% Share of Total	86.4%	90.5%	95.7%	100.0%	30.8%		77.6%	
TOTAL STUDENTS	500	465	185	48	107	126	1,431	100.0%

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	Total International Students
Africa	43.5%	43.5%	4.3%		8.7%		100.0%
Asia	61.5%	21.6%	4.0%	7.6%	5.2%		100.0%
Europe	28.9%	42.8%	18.2%		10.1%		100.0%
Middle East	100.0%						100.0%
North & Central America	59.6%	34.0%	4.3%		2.1%		100.0%
Oceania	100.0%						100.0%
South America	6.3%	59.3%	32.3%		2.0%		100.0%
Not Specified⁽¹⁾					27.2%	72.8%	100.0%
TOTAL STUDENTS	34.9%	32.5%	12.9%	3.4%	7.5%	8.8%	100.0%

Students from Asia tended to favour Full-Year Enrolment (61.5%). In contrast, 59.3% of students from South America favoured Half-Year Enrolment, with only 6.3% in Full-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	Total International Students
Africa	2.0%	2.2%	0.5%		1.9%		1.6%
Asia	77.4%	29.2%	13.5%	100.0%	30.8%		44.0%
Europe	9.2%	14.6%	15.7%		15.0%		11.1%
Middle East	0.4%						0.1%
North & Central America	5.6%	3.4%	1.1%		0.9%		3.3%
Oceania	0.4%						0.1%
South America	5.0%	50.5%	69.2%		7.5%		27.7%
Not Specified⁽¹⁾					43.9%	100.0%	12.1%
TOTAL STUDENTS	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

(1) "Not Specified" category includes the 135 students from Non-Reporting Institutions based on Schools Finance Branch Collection of International Student Data (Sept. 30, 2013).

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	8		8
Central	1	2	3
Interlake & Southeast	4		4
Winnipeg	7	6	13
TOTAL INSTITUTIONS	22	8	30

Table 5b. Total Enrolment by Grade Level; Manitoba Regions								
	Grades K - 4	Grades 5 - 8	Grade 9	Grade 10	Grade 11	Grade 12	Total Enrolment	% of Total
Northern & Remote					1	1	2	0.2%
Parkland & Westman		95	11	19	108	15	248	19.1%
Central		1	2	1	4	5	13	1.0%
Interlake & Southeast		1		15	29	9	54	4.2%
Winnipeg	16	84	63	221	310	285	979	75.5%
REPORTED ENROLMENT	16	181	76	256	452	315	1,296	100.0%
NON-REPORTED ENROLMENT ⁽¹⁾	1	17	8	16	27	66	135	
TOTAL ENROLMENT	17	198	84	272	479	381	1,431	

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					2		2		
Parkland & Westman	32	88	81	25	22		248	94.2	11.7%
Central	9	3			1		13	10.6	1.3%
Interlake & Southeast	17	25	1		11		54	30.7	3.8%
Winnipeg	442	349	103	23	62		979	669.0	83.2%
TOTAL ENROLMENT	500	465	185	48	98		1,296	805	100.0%
NON-REPORTED ENROLMENT ⁽¹⁾					9	126	135	63	
TOTAL ENROLMENT	500	465	185	48	107	126	1,431	868	

(1) "Non-Reported Enrolment" consists of 135 students from Non-Reporting Institutions, who were included in Schools Finance Branch Collection of International Student Data (Sept. 30, 2013). 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)			
	Actual Enrolment (excluding exchange)	Target Enrolment	% of Target Achieved
<u>PUBLIC SCHOOL SYSTEM</u>			
Beautiful Plains	6	5	120%
Brandon	5	2	250%
D.S.F.M.	6	6	100%
Fort La Bosse	17	15	113%
Lord Selkirk	26	30	87%
Louis Riel	215	250	86%
Mountain View	136	100	136%
Park West	7	7	100%
Pembina Trails	259	230	113%
Portage La Prairie	2	2	100%
Rolling River	19	20	95%
Southwest Horizon	24	20	120%
St. James-Assiniboia	180	175	103%
Turtle Mountain	12	5	240%
PUBLIC SCHOOL SYSTEM TOTAL	914	867	105.4%
<u>INDEPENDENT SCHOOLS</u>			
Balmoral Hall School	34	40	85%
Mennonite Brethren Collegiate Inst.	9	10	90%
Mennonite Collegiate Institute	7	10	70%
St. John's-Ravenscourt School	17	17	100%
St. Maurice School	1	1	100%
Steinbach Christian High School	3	3	100%
INDEPENDENT SCHOOLS TOTAL	71	81	87.7%
TOTAL - ALL RESPONDING SCHOOLS	985	948	103.9%

Showing only those institutions for which "Target Enrolment" was specified: For public schools, actual enrolment exceeded target enrolment by 5.4%. For independent schools, 87.7% of target was met on average.

Table 7. Total Estimated Manitoba Based Expenditures	
Full-Time Equivalent (FTE) Enrolment ⁽¹⁾	868
Average Student Expenditures per Month ⁽²⁾	\$1,025
Estimated Expenditure per FTE Student ⁽³⁾	\$10,250
Estimated Total Living Expenditures in Manitoba ⁽⁴⁾	\$8.89 Million
Tuition & Educational Fees Paid to Institutions ⁽⁵⁾	+ \$8.74 Million
TOTAL ESTIMATED MANITOBA BASED EXPENDITURES	= \$17.63 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. The Total FTE international student enrolment in 2013/14, estimated at 868 is shown in Table 2. Note, this estimate excludes international exchange students.

(2) "Average Student Expenditures per Month" are estimated by Employment and Social Development Canada (ESDC) as the Monthly Budget for Single Student Living Allowances in Manitoba in 2013/14, and includes \$445 for shelter, \$228 for grocery purchases, \$79 for local transportation and \$273 for other expenditures.

(3) The above student expenditure figure of \$1,025/month is multiplied by 10 to estimate one student's expenditures for 10 months (i.e., the expenditure level associated with a FTE student).

(4) "Estimated Total Living Expenditures in Manitoba" (\$8.89 million) is the estimated FTE students (868) multiplied by the estimated yearly expenditure (\$10,250).

(5) "Tuition & Educational Fees Paid to Institutions" (\$8.74 million) is as reported to Manitoba Education and Training.

Elementary and Secondary School International Students: Manitoba 2012/13 - 2013/14

Table A: Total Enrolment by Grade Level; Public & Independent School Systems

	Grades K - 4	Grades 5 - 8	Grade 9	Grade 10	Grade 11	Grade 12	Total
Public School System							
2012/13 Enrolment	22	235	76	194	349	292	1,168
2013/14 Enrolment	16	182	71	239	436	312	1,256
Net Change	-6	-53	-5	45	87	20	88
Percent Change	-27.3%	-22.6%	-6.6%	23.2%	24.9%	6.8%	7.5%
Independent Schools							
2012/13 Enrolment	1	10	11	18	53	50	143
2013/14 Enrolment	1	16	13	33	43	69	175
Net Change	0	6	2	15	-10	19	32
Percent Change	0.0%	60.0%	18.2%	83.3%	-18.9%	38.0%	22.4%
Total Enrolment							
2012/13 Enrolment	23	245	87	212	402	342	1,311
2013/14 Enrolment	17	198	84	272	479	381	1,431
Net Change	-6	-47	-3	60	77	39	120
Percent Change	-26.1%	-19.2%	-3.4%	28.3%	19.2%	11.4%	9.2%

Total International Student Enrolment by Grade Level

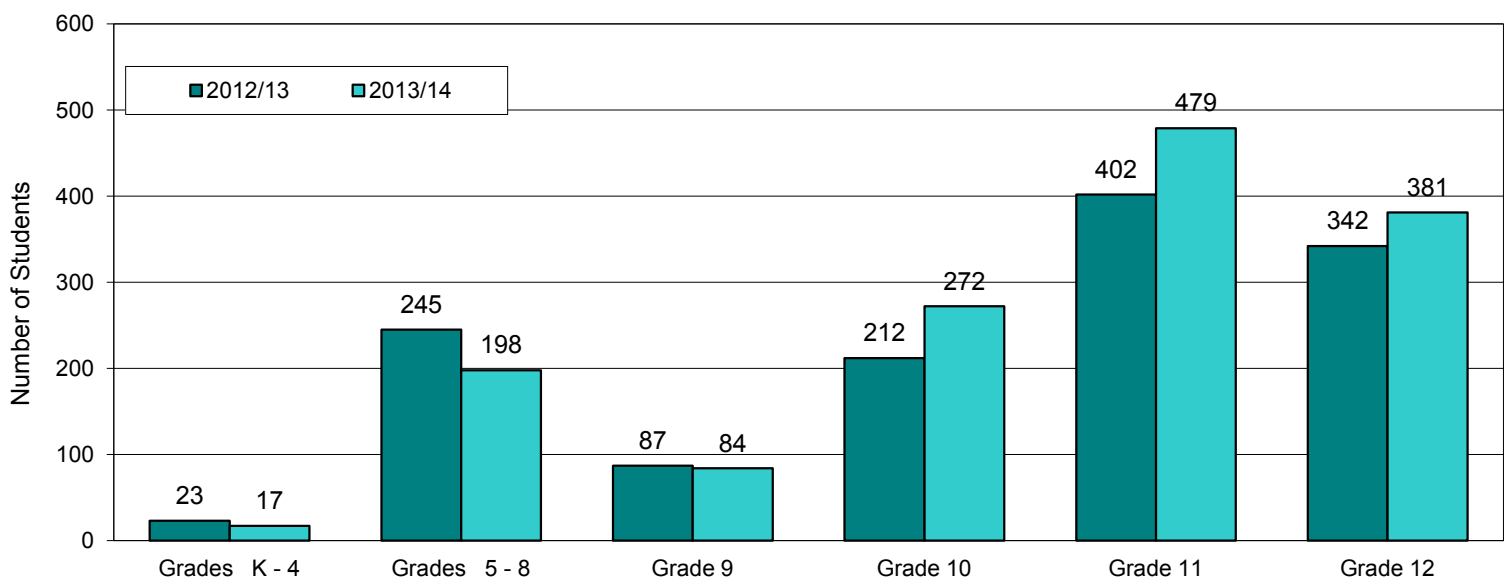


Table B: Total Enrolment by Type/Duration & Full-Time-Equivalency; Public & Independent School Systems

	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 ⁽²⁾
Public School System								
2012/13 Enrolment	466	366	168	66	78	24	1,168	719
2013/14 Enrolment	437	460	180	48	97	34	1,256	754
Net Change	-29	94	12	-18	19	10	88	35
Percent Change	-6.2%	25.7%	7.1%	-27.3%	24.4%	41.7%	7.5%	4.8%
Independent Schools								
2012/13 Enrolment	51	6	7	0	23	56	143	85
2013/14 Enrolment	63	5	5	0	10	92	175	114
Net Change	12	-1	-2	0	-13	36	32	29
Percent Change	23.5%	-16.7%	-28.6%	0.0%	-56.5%	64.3%	22.4%	34.4%
Total Enrolment								
2012/13 Enrolment	517	372	175	66	101	80	1,311	804
2013/14 Enrolment	500	465	185	48	107	126	1,431	868
Net Change	-17	93	10	-18	6	46	120	64
Percent Change	-3.3%	25.0%	5.7%	-27.3%	5.9%	57.5%	9.2%	7.9%

(1) Enrolment for Non-Reporting Institutions is based on Schools Finance Branch Collection of International Student Data, which provides a breakdown for Exchange Students and Other International Students but not Duration of Enrolment.

(2) 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.

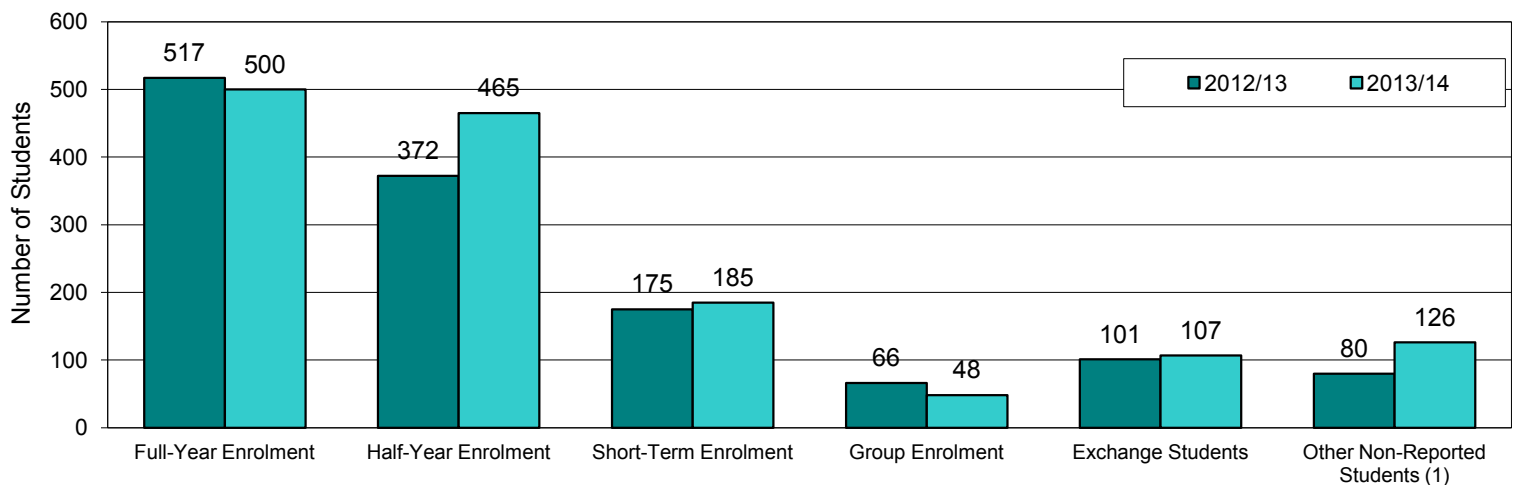
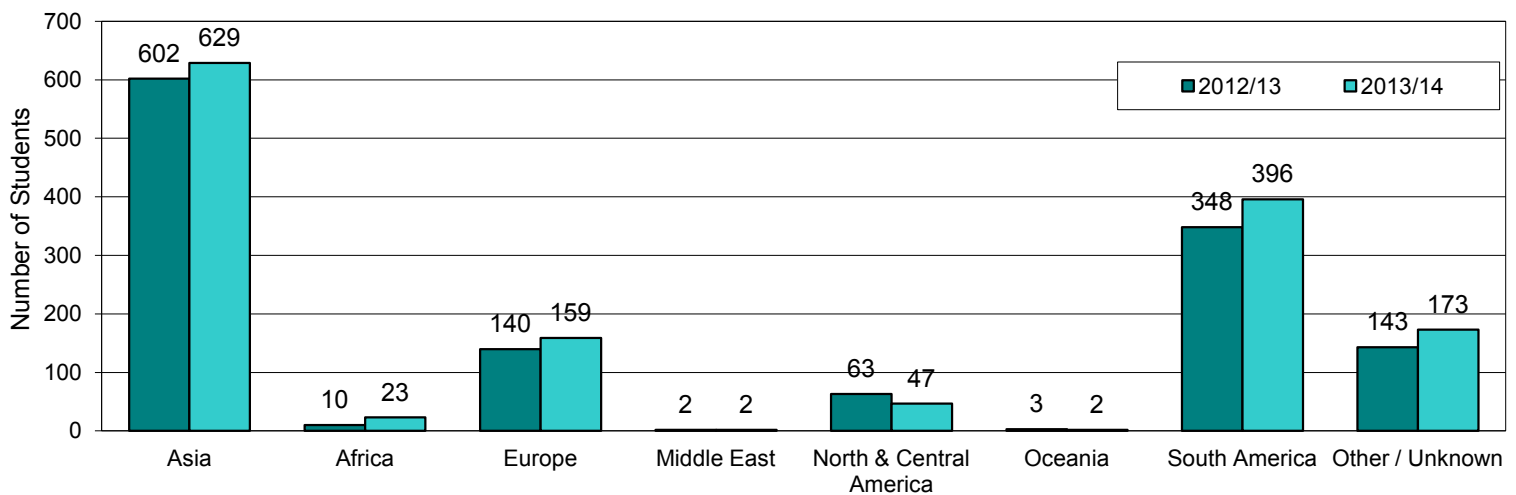
Total International Student Enrolment by Type/Duration


Table C: Distribution of Students by World Region

	Asia	Africa	Europe	Middle East	North & Central America	Oceania	South America	Other / Unknown	Total
Total Enrolment by World Region									
2012/13 Enrolment	602	10	140	2	63	3	348	143	1,311
2013/14 Enrolment	629	23	159	2	47	2	396	173	1,431
Net Change	27	13	19	0	-16	-1	48	30	120
Percent Change	4.5%	130.0%	13.6%	0.0%	-25.4%	-33.3%	13.8%	21.0%	9.2%

Total International Student Enrolment by World Region

Table D: Total Estimated Manitoba Based Expenditures

	2012/13	2013/14	Net Change	Percent Change
Full-Time-Equivalent Enrolment	804	868	64	7.9%
Estimated Expenditure per FTE Student	\$10,020	\$10,250	\$230	2.3%
Estimated Student Living Expenditures (\$Millions)	\$8.05	\$8.89	\$0.84	10.4%
Tuition & Educational Fees Paid (\$Millions)	\$8.07	\$8.74	\$0.67	8.3%
Total Estimated Manitoba Based Expenditures (\$Millions)	\$16.12	\$17.63	\$1.51	9.4%

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) "Estimated Student Living Expenditures" is the product of FTE Enrolment multiplied by their Estimated Expenditures (sourced to Employment and Social Development Canada).

(2) "Tuition & Educational Fees Paid" is as reported to the Manitoba International Education Branch of Manitoba Education and Training.

Section IV

LANGUAGE SECTOR ENGLISH AS AN ADDITIONAL LANGUAGE INSTITUTIONS

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

Some short term EAL students, those who study less than six months and who come from visa-exempt countries, do not require study permits. This report captures data about these students, whereas they are not counted in the figures from Immigration, Refugees, and Citizenship Canada (IRCC).

----- **Capacity and Targets** -----

Many students come to Manitoba with the sole purpose of studying EAL (also known as ESL or English as a Second Language). Many others, however, require EAL upgrading as a prerequisite for their academic programs in Manitoba. EAL programs are an important pathway for admitting international students to Manitoba's post-secondary institutions.

Understanding the capacity of EAL institutions to enroll additional international students provides a key indicator by which to gauge the overall capacity for growth in Manitoba's international education sector. This is illustrated in Table 5: *Actual & Targeted International Student Enrolment by Institution*.

Estimating capacity in the language sector is a complex task based on many variables including cohort start dates, levels of English taught, and availability of qualified TOESL instructors, homestays, and sufficient physical space and infrastructure.

EAL institutions were asked to assess their potential capacity to admit additional international students into their programs. Their target was then compared with their actual international student enrollment to determine their success in reaching their own enrolment targets.

----- **Economic Impact** -----

EAL institutions were asked to provide the costs of tuition, accommodation, and all related fees charged to international EAL students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions in the tables outlining *Student Fees and Economic Impact*.

This data, along with estimated student expenditures, was used to estimate the value of the language component of the international education sector to the provincial economy in 2013/14.

International ESL Students: Manitoba 2013/14

Table 1. Total Enrolment by Institution & Concurrent Enrolment Status

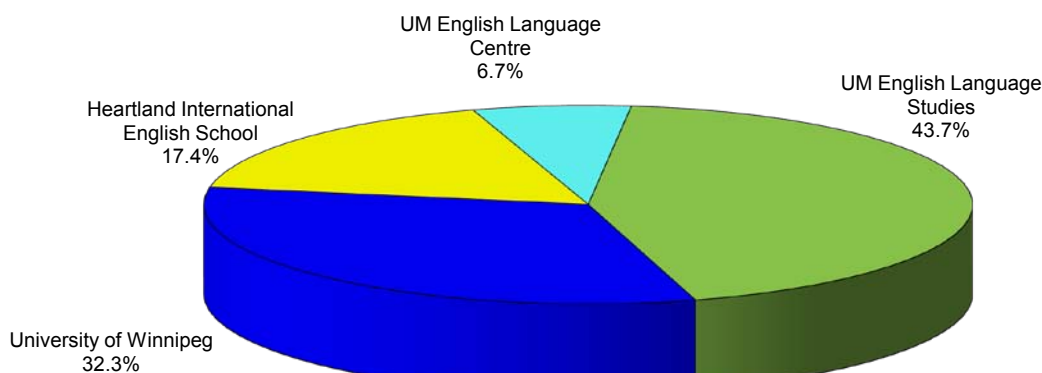
Total International ESL Students	Brandon University ⁽¹⁾	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment	% of Total
Total Enrolment by Institution								
Number of Students		261	85	628	747	485	2,206	100.0%
Percent Share of Total		11.8%	3.9%	28.5%	33.9%	22.0%	100.0%	
Concurrently Enrolled in Post-Secondary Program								
Number of Students			85	528	90		703	31.9%
Percent Share of Total			12.1%	75.1%	12.8%		100.0%	
Not Concurrently Enrolled in Post-Secondary Program								
Number of Students		261		100	657	485	1,503	68.1%
Percent Share of Total		17.4%		6.7%	43.7%	32.3%	100.0%	

1) Brandon University did not respond to the 2013/14 international student survey for ESL/EAL.

Enrolment at Red River College (not shown) is represented in the international student enrolment counts collected for the post-secondary sector.

Total 2013/14 ESL International Student Enrolment in Manitoba is reported at 2,206, with 703 (31.9%) of these students reported as being concurrently enrolled in other post-secondary studies. This report focuses on the non-concurrently enrolled students on the premise that concurrently enrolled students are accounted for in the post-secondary sector reports on international students in Manitoba.

**Non-Concurrently Enrolled ESL International Students
Percent Share by Institution (2013/14)**



International ESL Students: Manitoba 2013/14

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

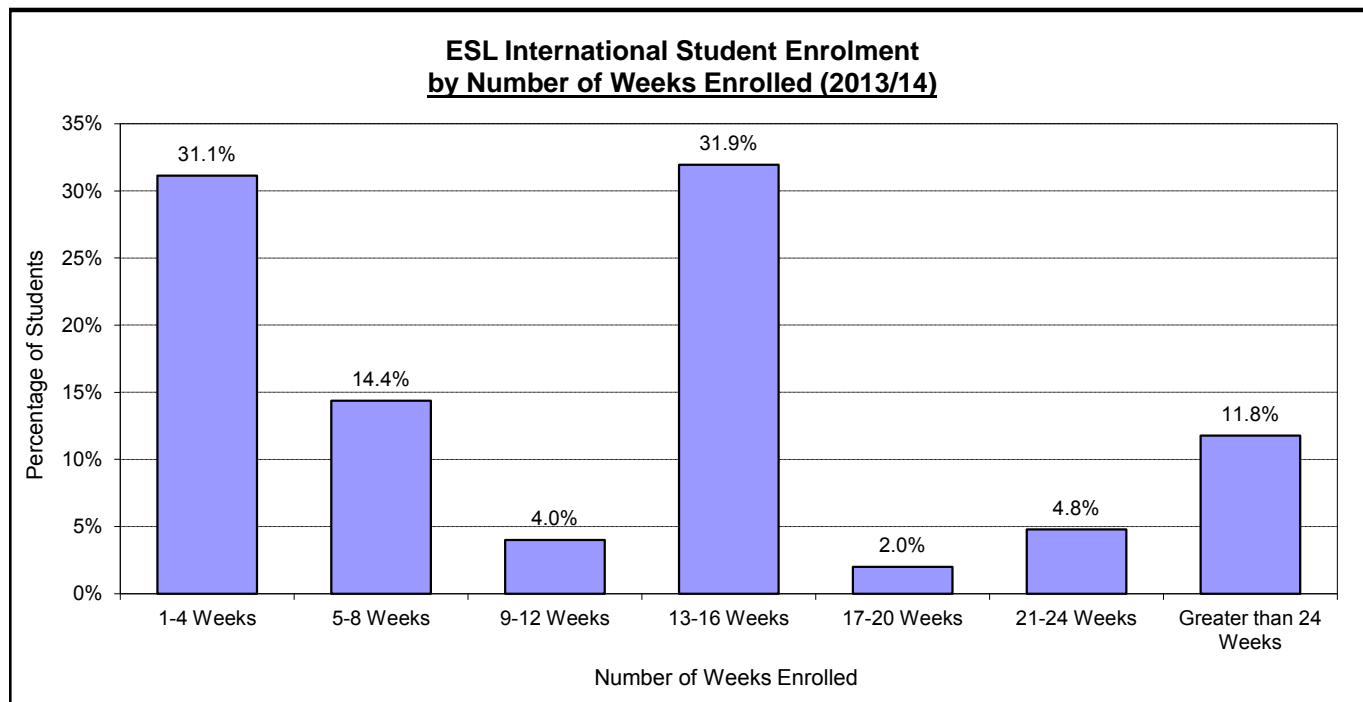
Non-Concurrently Enrolled International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment	% of Total
ESL Enrolment								
1 Week		29					29	1.9%
2 Weeks		23					23	1.5%
3 Weeks		13			10		23	1.5%
4 Weeks		62			217	114	393	26.1%
5 Weeks		7			69	1	77	5.1%
6 Weeks		10					10	0.7%
7 Weeks		11				25	36	2.4%
8 Weeks		20			73		93	6.2%
9 Weeks		5			11		16	1.1%
10 Weeks		10			1		11	0.7%
11 Weeks		4					4	0.3%
12 Weeks		18			11		29	1.9%
13 Weeks					9		9	0.6%
14 Weeks		4		74	36	252	366	24.4%
15 Weeks		3					3	0.2%
16 Weeks		10			92		102	6.8%
17 Weeks		3			12		15	1.0%
18 Weeks		2			7		9	0.6%
19 Weeks		3					3	0.2%
20 Weeks		3					3	0.2%
22 Weeks					59		59	3.9%
23 Weeks		1					1	0.1%
24 Weeks		12					12	0.8%
25 Weeks		2					2	0.1%
26 Weeks		1			37		38	2.5%
28 Weeks				21		69	90	6.0%
30 Weeks		1			5		6	0.4%
31 Weeks		1					1	0.1%
34 Weeks		1			8		9	0.6%
36 Weeks		2					2	0.1%
42 Weeks				5		24	29	1.9%
Total Number of Students		261		100	657	485	1,503	100%
Total Weeks of ESL Study ⁽¹⁾		2,118		1,834	7,173	7,104	18,229	
Average Enrolment (Weeks) ⁽²⁾		8.1		18.3	10.9	14.6	12.1	

(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).

(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 2013/14) is 12.1 Weeks, with 1,503 students receiving 18,229 weeks of instruction.

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

Non-Concurrently Enrolled International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrollment	% of Total
ESL Enrolment								
1-4 Weeks		127			227	114	468	31.1%
5-8 Weeks		48			142	26	216	14.4%
9-12 Weeks		37			23		60	4.0%
13-16 Weeks		17		74	137	252	480	31.9%
17-20 Weeks		11			19		30	2.0%
21-24 Weeks		13			59		72	4.8%
Greater than 24 Weeks		8		26	50	93	177	11.8%
Total Number of Students		261		100	657	485	1,503	100.0%
Total Weeks of ESL Study		2,118		1,834	7,173	7,104	18,229	
Average Enrolment (Weeks)		8.1		18.3	10.9	14.6	12.1	



In 2013/14, 49.5% of international ESL students were enrolled for 1-12 weeks, 38.7% were enrolled for 13-24 weeks and 11.8% were enrolled for more than 24 weeks.

Table 3a. Enrolment by Institution & Country of Origin

Non-Concurrently Enrolled International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment	% of Total
Africa		12		2	2	9	25	1.7%
Burundi		1					1	0.1%
Cameroon		4				1	5	0.3%
Comoros		1					1	0.1%
Congo		3		1			4	0.3%
Cote-d'Ivoire						2	2	0.1%
Mali		2				4	6	0.4%
Morocco		1				1	2	0.1%
Mozambique				1			1	0.1%
Rwanda					2		2	0.1%
Senegal						1	1	0.1%
Asia		94		71	398	387	950	63.2%
Bangladesh				1			1	0.1%
China, People's Republic		18		45	224	91	378	25.1%
Hong Kong		10		1		3	14	0.9%
India		3		1		2	6	0.4%
Japan		17		8	103	88	216	14.4%
Korea, South		28		9	36	193	266	17.7%
Mongolia				1			1	0.1%
Pakistan				2		1	3	0.2%
Philippines		2		1	1		4	0.3%
Sri Lanka						1	1	0.1%
Taiwan		14			23		37	2.5%
Thailand		1		1	1	2	5	0.3%
Vietnam		1		1	10	6	18	1.2%
Europe		36			9	10	55	3.7%
Armenia		1					1	0.1%
Azerbaijan		1					1	0.1%
Croatia		1					1	0.1%
France		1				1	2	0.1%
Germany		3			1	2	6	0.4%
Ireland		1					1	0.1%
Italy		3			1		4	0.3%
Kazakhstan					1	1	2	0.1%
Kyrgyzstan					2		2	0.1%
Poland		1				1	2	0.1%
Portugal		1					1	0.1%
Russia		4					4	0.3%
Spain		2			1		3	0.2%
Switzerland		9				1	10	0.7%
Ukraine		8			3	3	14	0.9%
United Kingdom						1	1	0.1%
North & Central America		22		1	82	52	157	10.4%
Dominican Republic						1	1	0.1%
El Salvador						1	1	0.1%
Mexico		21		1	82	50	154	10.2%
United States		1					1	0.1%

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International ESL Students: Manitoba 2013/14

Table 3a. (Continued)

Non-Concurrently Enrolled International ESL Students	<i>Brandon University</i>	<i>Heartland International English School</i>	<i>Providence University College</i>	<i>UM English Language Centre</i>	<i>UM English Language Studies</i>	<i>University of Winnipeg</i>	Total Enrolment	% of Total
Middle East		24		22	33	13	92	6.1%
Eritrea		1					1	0.1%
Iran				3			3	0.2%
Israel		4					4	0.3%
Jordan					2	1	3	0.2%
Lebanon				1			1	0.1%
Libya		1		1	7		9	0.6%
Oman (Muscat)		1			1		2	0.1%
Saudi Arabia		14		14	22	12	62	4.1%
Sudan				1			1	0.1%
Turkey		3		2	1		6	0.4%
South America		73		4	133	14	224	14.9%
Argentina		4					4	0.3%
Brazil		57		2	116	12	187	12.4%
Chile		2			8	1	11	0.7%
Colombia		3		1	5		9	0.6%
Ecuador		2					2	0.1%
Paraguay						1	1	0.1%
Peru		2					2	0.1%
Venezuela		3		1	4		8	0.5%
TOTAL STUDENTS		261		100	657	485	1,503	100.0%

Table 3b. Top Ten Countries of Origin

Non-Concurrently Enrolled International ESL Students	<i>Brandon University</i>	<i>Heartland International English School</i>	<i>Providence University College</i>	<i>UM English Language Centre</i>	<i>UM English Language Studies</i>	<i>University of Winnipeg</i>	Total Enrolment	% of Total
1 China, People's Republic		18		45	224	91	378	25.1%
2 Korea, South		28		9	36	193	266	17.7%
3 Japan		17		8	103	88	216	14.4%
4 Brazil		57		2	116	12	187	12.4%
5 Mexico		21		1	82	50	154	10.2%
6 Saudi Arabia		14		14	22	12	62	4.1%
7 Taiwan		14			23		37	2.5%
8 Vietnam		1		1	10	6	18	1.2%
9 Hong Kong		10		1		3	14	0.9%
10 Ukraine		8			3	3	14	0.9%
SUB-TOTAL		188		81	619	458	1,346	89.6%
% Share of Institution Total		72.0%		81.0%	94.2%	94.4%	89.6%	
TOTAL STUDENTS		261		100	657	485	1,503	100.0%

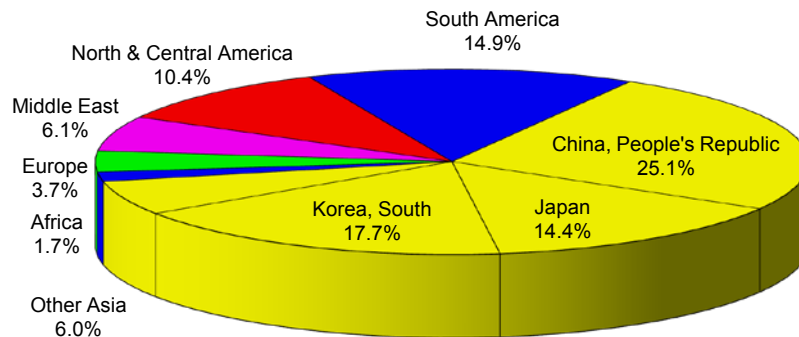
Of the 1,503 students, 950 (63.2%) originated from Asia. Five of the most represented countries are in Asia; People's Republic of China (378), South Korea (266), Japan (216), Taiwan (37), and Vietnam (18). Also well represented in the 2013/14 International ESL student counts; Brazil (187), Mexico (154), and Saudi Arabia (62).

The top ten represented countries accounted for 89.6% of total ESL students in 2013/14.

Table 3c. Summary of Enrolment by World Region

Non-Concurrently Enrolled International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrollment	% of Total
China, People's Republic		18		45	224	91	378	25.1%
Japan		17		8	103	88	216	14.4%
Korea, South		28		9	36	193	266	17.7%
Other Asia		31		9	35	15	90	6.0%
Africa		12		2	2	9	25	1.7%
Europe		36			9	10	55	3.7%
Middle East		24		22	33	13	92	6.1%
North & Central America		22		1	82	52	157	10.4%
South America		73		4	133	14	224	14.9%
Other / Unknown								
TOTAL STUDENTS		261		100	657	485	1,503	100.0%

**ESL International Student Enrolment
Percent Share by World Region (2013/14)**



International ESL Students: Manitoba 2013/14

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

Non-Concurrently Enrolled International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment
Asia		9.9%		7.5%	41.9%	40.7%	100.0%
Africa		48.0%		8.0%	8.0%	36.0%	100.0%
Europe		65.5%			16.4%	18.2%	100.0%
Middle East		26.1%		23.9%	35.9%	14.1%	100.0%
North & Central America		14.0%		0.6%	52.2%	33.1%	100.0%
Oceania							
South America		32.6%		1.8%	59.4%	6.3%	100.0%
Other / Unknown							
TOTAL STUDENTS		17.4%		6.7%	43.7%	32.3%	100.0%

Heartland International English School, with 17.4% of international ESL students had 65.5% of the students from Europe. University of Winnipeg, with 32.3% of international student enrolment had only 6.3% of the students from South America. And University of Manitoba English Language Centre with only 6.7% of international student enrolment had 23.9% of Middle Eastern students.

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

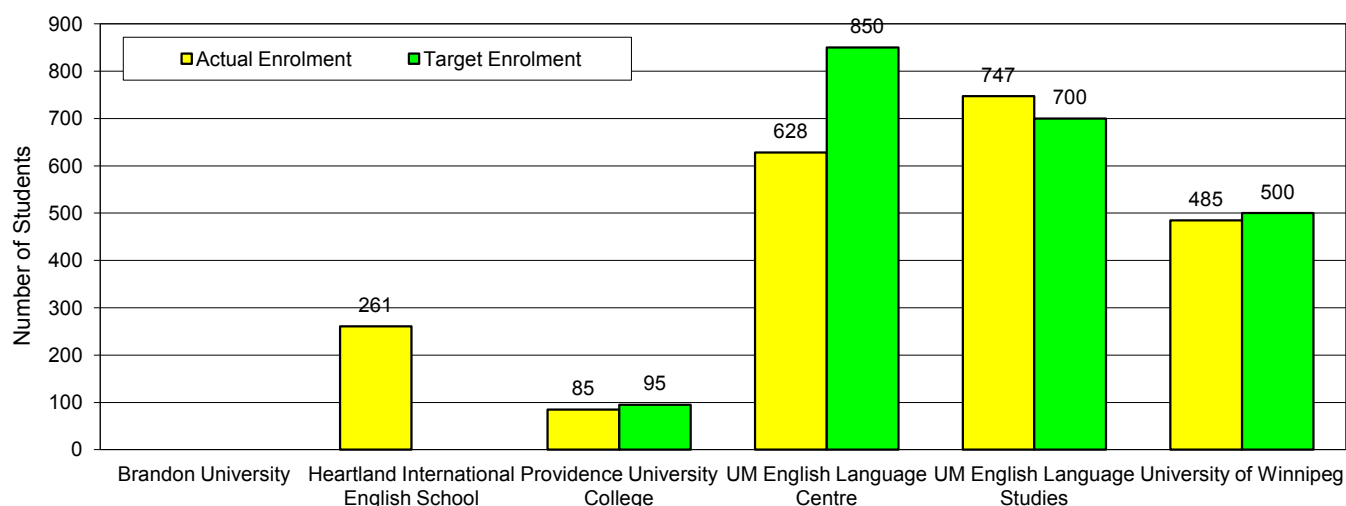
Non-Concurrently Enrolled International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment
Asia		36.0%		71.0%	60.6%	79.8%	63.2%
Africa		4.6%		2.0%	0.3%	1.9%	1.7%
Europe		13.8%			1.4%	2.1%	3.7%
Middle East		9.2%		22.0%	5.0%	2.7%	6.1%
North & Central America		8.4%		1.0%	12.5%	10.7%	10.4%
Oceania							
South America		28.0%		4.0%	20.2%	2.9%	14.9%
Other / Unknown							
TOTAL STUDENTS		100.0%		100.0%	100.0%	100.0%	100.0%

Students from Asia accounted for 63.2% of the international ESL student population in 2013/14.

The share of international students from Asia ranged from 79.8% for University of Winnipeg, to 36.0% for Heartland International English School.

Table 5. Actual & Targeted International Student Enrolment by Institution

Total International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment
2013/14 Enrolment		261	85	628	747	485	2,206
2013/14 Target Enrolment			95	850	700	500	2,145
% of Target Achieved			89.5%	73.9%	106.7%	97.0%	102.8%

Actual & Targeted ESL International Student Enrolment (2013/14)

Table 6. Total Estimated Manitoba Based Expenditures

Average Student Expenditures per Month ⁽¹⁾	\$1,025
Equivalent Weekly Expenditure ⁽²⁾	\$237
Total Weeks of ESL Study	18,229
Estimated Total Living Expenditures in Manitoba	\$4.31 Million
Tuition & Educational Fees Paid to Institutions ⁽³⁾	+ \$8.80 Million
Total Estimated Manitoba Based Expenditures	= \$13.11 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 \$1,025. The figure is published by Employment and Social Development Canada (ESDC) as the Monthly Budget for Single Student Living Allowances in Manitoba in 2013/14, and includes \$445 for shelter, \$228 for grocery purchases, \$79 for local transportation and \$273 for other expenditures.

(2) Monthly student expenditures of \$1,025 represents \$237 per week. When multiplied by the 18,229 Total Weeks of ESL Study (Table 2a) this yields an estimate of International ESL students' expenditures in Manitoba of \$4.31 million.

(3) "Tuition & Educational Fees Paid to Institutions" (\$8.80 million) is as reported to the Manitoba International Education Branch of Manitoba Education and Training.

Table A: Total Enrolment & Enrolment Targets by Institution

Total International ESL Students	Brandon University ⁽¹⁾	Heartland International English School	Providence University College ⁽²⁾	UM English Language Centre	UM English Language Studies ⁽²⁾	University of Winnipeg	Total Enrolment ⁽³⁾
Non-Concurrent Enrolment							
2012/13 Enrolment	54	234		75	499	472	1,334
2013/14 Enrolment		261		100	657	485	1,503
Concurrent Enrolment							
2012/13 Enrolment				448	89	0	537
2013/14 Enrolment			85	528	90	0	703
Total Enrolment							
2012/13 Enrolment	54	234		523	588	472	1,871
2013/14 Enrolment		261	85	628	747	485	2,206
Net Change	-54	27	85	105	159	13	335
Percent Change	-100.0%	11.5%		20.1%	27.0%	2.8%	17.9%
Target Enrolment							
2012/13 Target	60			600	540	500	1,700
2013/14 Target			95	850	700	500	2,145
Net Change	-60		95	250	160	0	445
Percent Change				41.7%	29.6%	0.0%	26.2%

(1) Brandon University did not respond to the 2013/14 survey.

(2) Providence University College did not respond to the 2012/13 survey, and had zero non-concurrently enrolled students in 2013/14.

(3) ESL enrolment at Red River College (not shown) is represented in the international student enrolment counts collected for the post-secondary sector.

The remainder of this report provides details of the non-concurrently enrolled international student population, on the premise that concurrently enrolled students are accounted for in the post-secondary sector reports on international students in Manitoba.

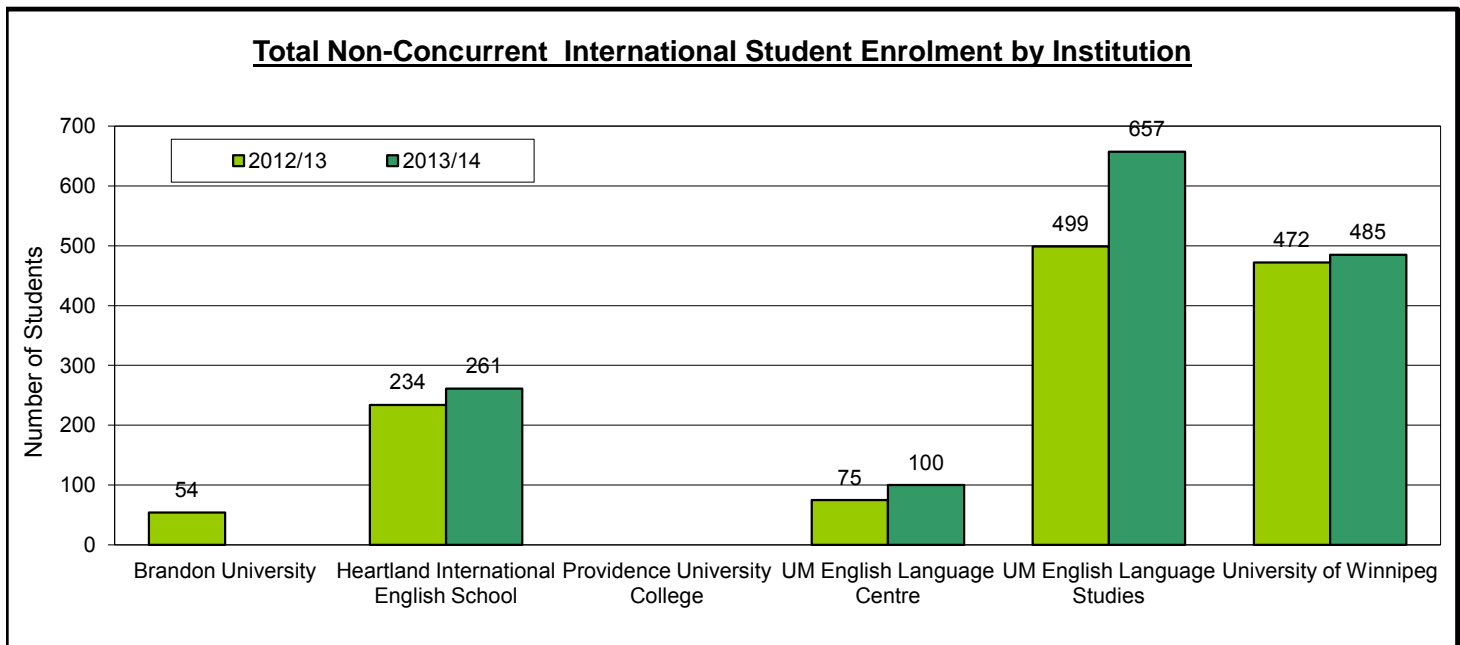


Table B: Total and Average Weeks of Enrolment by Institution

Non-Concurrently Enrolled International ESL Students	Brandon University	Heartland International English School	Providence University College	UM English Language Centre	UM English Language Studies	University of Winnipeg	Total Enrolment
Total Weeks of ESL Enrolment							
2012/13 Student-Weeks	1,014	2,155		1,456	5,348	6,516	16,489
2013/14 Student-Weeks	0	2,118		1,834	7,173	7,104	18,229
Net Change	-1,014	-37		378	1,825	588	1,740
Percent Change	-100.0%	-1.7%		26.0%	34.1%	9.0%	10.6%
Average Length of Enrolment (Weeks)							
2012/13 Enrolment	18.8	9.2		19.4	10.7	13.8	12.4
2013/14 Enrolment		8.1		18.3	10.9	14.6	12.1
Net Change	-18.8	-1.1		-1.1	0.2	0.8	-0.2
Percent Change	-100.0%	-11.9%		-5.5%	1.9%	6.1%	-1.9%

Table C: Distribution of Students by Number of Weeks Enrolled

Non-Concurrently Enrolled International ESL Students	1-4 Weeks	5-8 Weeks	9-12 Weeks	13-16 Weeks	17-20 Weeks	21-24 Weeks	Greater than 24 Weeks	Total Number of Students
Total Enrolment by Weeks Enrolled								
2012/13 Enrolment	458	216	36	385	21	42	176	1,334
2013/14 Enrolment	468	216	60	480	30	72	177	1,503
Net Change	10	0	24	95	9	30	1	169
Percent Change	2.2%	0.0%	66.7%	24.7%	42.9%	71.4%	0.6%	12.7%

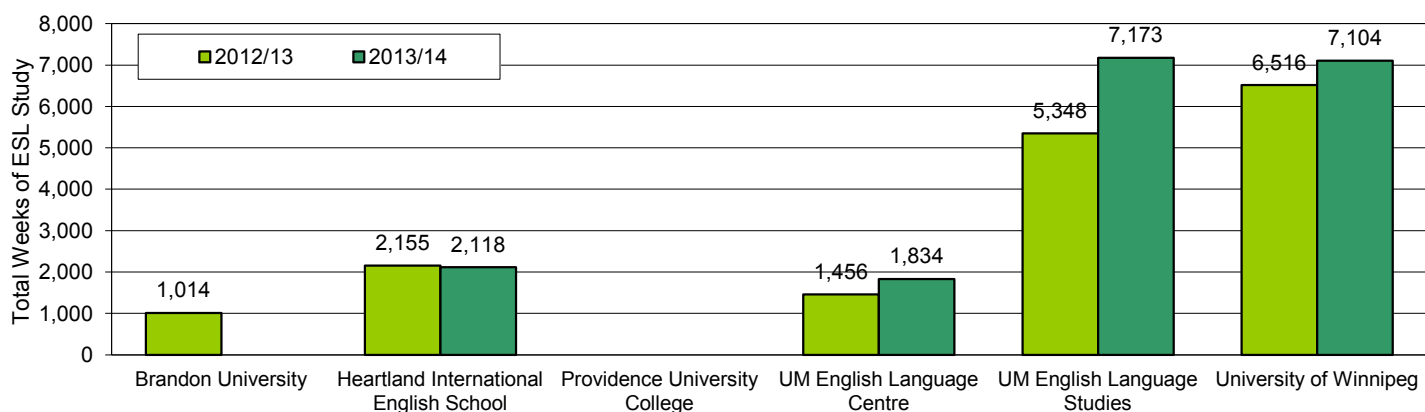
Notes on Charts (following page):

Total Weeks of Enrolment is a function of Total Enrolment and Average Length of Enrolment. Year-over-year changes can therefore result from changes in actual enrolment or duration.

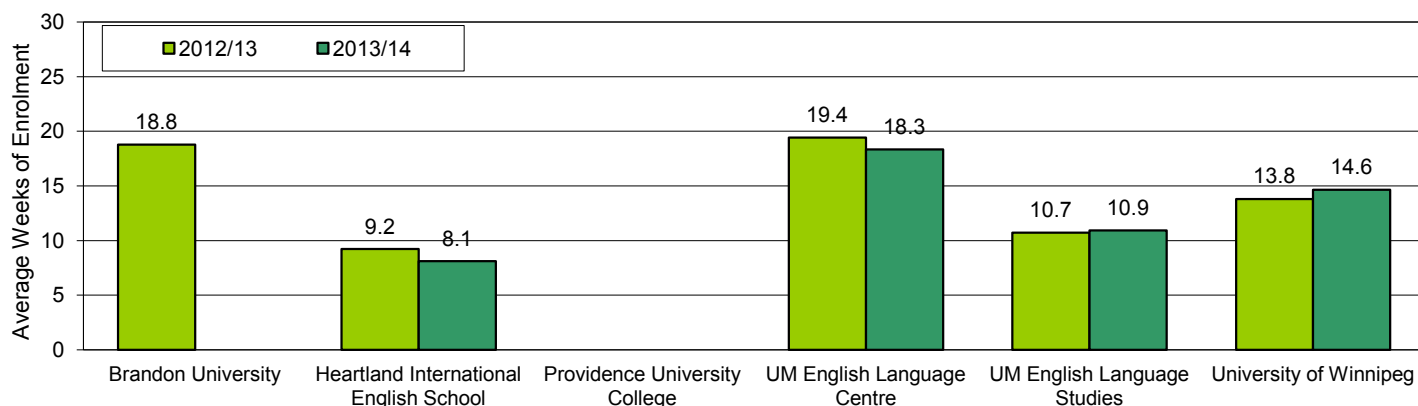
Changes in Average Weeks of Enrolment may reflect changes in how ESL programs are offered by the various institutions, the presence or absence of group enrolment (which can skew results) or changes initiated by international students.

International ESL Students: Manitoba 2012/13 - 2013/14

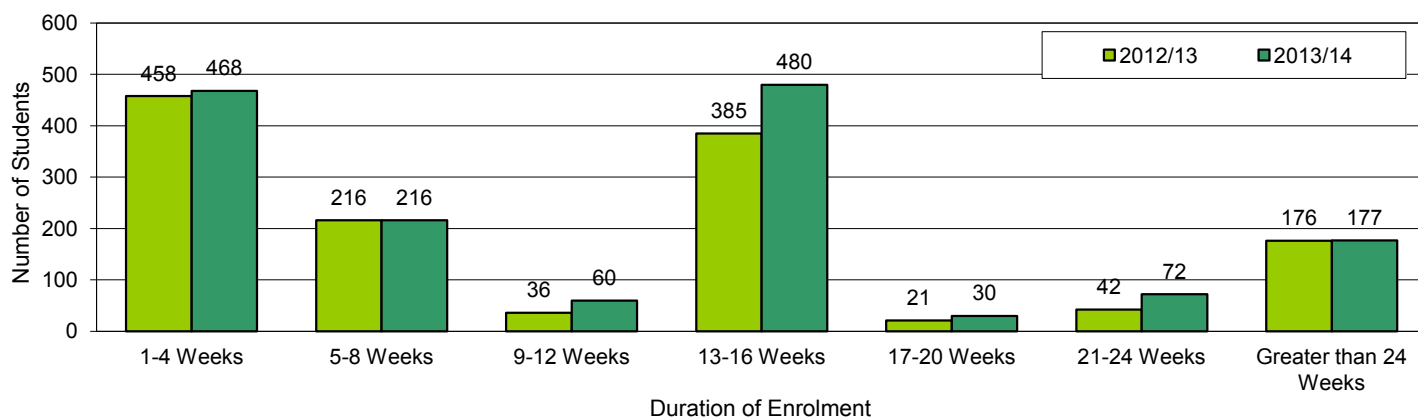
Total Weeks of Enrolment by Institution



Average Weeks of Enrolment by Institution



Distribution of Students by Weeks Enrolled



International ESL Students: Manitoba 2012/13 - 2013/14

Table D: Distribution of Students by World Region

Non-Concurrently Enrolled International ESL Students	Asia	Africa	Europe	Middle East	North & Central America	Oceania	South America	Other / Unknown	Total
Total Enrolment by World Region									
2012/13 Enrolment	900	18	54	102	70	0	188	2	1,334
2013/14 Enrolment	950	25	55	92	157	0	224	0	1,503
Net Change	50	7	1	-10	87	0	36	-2	169
Percent Change	5.6%	38.9%	1.9%	-9.8%	124.3%	0.0%	19.1%	-100.0%	12.7%

Students from Africa and South America have been increasing, while there has been a decline in students from the middle East. And while Asia dominates in overall enrolment, number of students from Asia is relatively unchanged.

Table E: Total Estimated Manitoba Based Expenditures

	2012/13	2013/14	Net Change	Percent Change
Total Weeks of ESL Enrolment	16,489	18,229	1,740	10.6%
Average Weekly Student Expenditures (\$'s)	\$231	\$237	\$5	2.3%
Estimated Student Living Expenditures ⁽¹⁾ (\$Millions)	\$3.81	\$4.31	\$0.50	13.1%
Tuition & Educational Fees Paid ⁽²⁾ (\$Millions)	\$8.28	\$8.80	\$0.52	6.3%
Total Estimated Manitoba Based Expenditures (\$Millions)	\$12.09	\$13.11	\$1.02	8.4%

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) "Estimated Student Living Expenditures" is the product of Total Weeks of Enrolment multiplied by Average Weekly Student Expenditures (sourced to Employment and Social Development Canada).

(2) "Tuition & Educational Fees Paid" is as reported to the Manitoba International Education Branch of Manitoba Education and Training, and includes students concurrently enrolled in other post-secondary programs.