

A man and a woman are sitting at a desk, looking at a laptop screen. The man is on the left, wearing a grey sweater, a black beanie, and glasses, with his hand on his chin. The woman is on the right, wearing a blue and white plaid shirt, smiling. They are in front of a large window with a view of a brick building and bare trees outside.

International Education in Canada — Steven Bradbury or Wayne Gretzky?

Nous Group

The following paper was intended to be presented by Nous Group at the Asia-Pacific Association for International Education (APAIE) conference in March 2020 in Vancouver. Due to the COVID-19 pandemic, this conference was postponed.

While this paper was prepared prior to COVID-19 – a pandemic that creates great uncertainty for international education – it is still highly relevant to reflect on the drivers of Canada's remarkable performance in international education, and to explore potential threats to its continued success, drawing on related experiences in Australia and the UK.

Nous Group is a management consultancy established in Australia that has offices in Canada and the UK. We partner with leaders to shape world-class businesses, effective governments and empowered communities. We have worked extensively with global universities to shape and advance their most significant strategic and operational agendas.

Find out more about Nous at www.nousgroup.com.

Executive Summary

Canada has long been a global leader in international education, in recent years recording double-digit growth in student numbers. There is strong evidence that Canada's success is a result of sound actions by governments and institutions. We have identified four factors that have driven Canada's success, namely, Canada's:

1. High-performing education sector
2. International pulling power
3. Price-product mix
4. Positive approach to immigration.

With success comes new challenges. Experience in Australia and the United Kingdom points to some of the challenges that may materialize for Canada, and could well be amplified in the context of changed market conditions post-COVID-19:

1. Unbalanced growth. Relying on a small number of source countries sending students to a limited number of cities in the destination country can cause vulnerability. The international education sector should consider ways to diversify the countries from which students are recruited, and ensure they study at a wider range of institutions. This creates a more robust sector that can better withstand shocks.
2. Overheating migration. The inflow of international students relies on a supportive migration environment that allows students to enter, and potentially find a pathway to work in the country. A rapid inflow of migration can potentially undermine public confidence in the process and encourage governments to take a more restrictive attitude.
3. Turning on taps rather than digging wells. When institutions are seeking a rapid influx of students, it can be tempting to seek to turn on taps – that is, using tools such as migration agent commissions to encourage the inflow of students. Instead, institutions should consider digging wells – that is, positioning the institution for long-term success, such as through investing in the course portfolio.

Keeping its key drivers of success in mind and carefully navigating these threats will be key to sustained success.



The 2002 Winter Olympics

If Wayne Gretzky is Canada's legend on ice, then Steven Bradbury is Australia's. Bradbury was the first athlete from Australia (or anywhere in the Southern Hemisphere) to win a gold medal at a Winter Olympics.

The event was the men's 1000m speed skating at the 2002 Games in Salt Lake City. Bradbury's charmed path to the final benefitted from the disqualification of Canadian Marc Gagnon in the quarterfinals for obstruction and a crash in the semi-final that took out two other contenders and saw another disqualified.

Bradbury, in the twilight of his career, was realistic about his chances of winning the final. The only viable strategy he could see was a potential crash, given the pressure on his competitors. He executed a wait-and-see strategy.

The rest is history: Bradbury won after all of his opponents (including Canadian Mathieu Turcotte and host-country favourite Apolo Ohno) were caught in a pile-up on the last corner.

"Doing a Bradbury" – to win by accident – is now a universal Australian idiom.

Ten years of growth

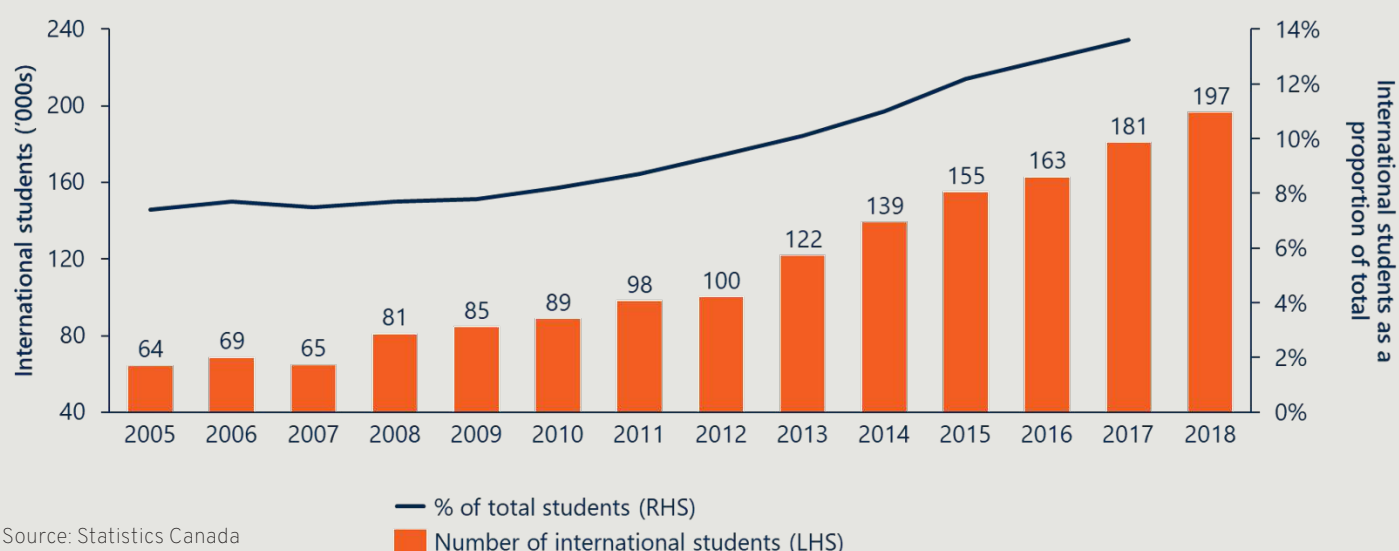
COVID-19 led to the Asia Pacific Association for International Education (APAIE) conference, due to be held in Vancouver in late March, to be postponed. Notwithstanding the present tumult for global mobility, it seems a fitting time to reflect on Canada's remarkable performance in international education.

The latest figures from Statistics Canada show a 15.5 per cent increase in international higher education student numbers in 2017-18 from the previous year, continuing year-on-year double-digit growth. This rate of growth is significantly above the most

recently reported year-on-year growth for other competitors including the UK (5.6 per cent according to HESA), Australia (7.2 per cent according to Austrade MIP) and the US (0.05 per cent according to IIE).

This growth in international students has come amid stagnant domestic student enrolments, like in many developed countries. As a result, international students are rapidly rising as a proportion of the student population. This can be seen in Figure 1.

Figure 1 : Number of international students and international students as a percentage of total students – university sector only





Doing a Bradbury?

Some might argue that Canada's international performance is more akin to doing a Bradbury than emulating Gretzky.

Both the United Kingdom and United States have been comparatively unwelcoming destinations in recent years. The UK's international education policies have been caught in broader anti-immigration sentiment. Seven years with no post-study work rights has been particularly detrimental. As far back as 2015, the All-Party Parliamentary Group on Migration concluded closing the UK's post-study work program had "made the UK a less attractive destination for many prospective students".¹ The ongoing uncertainty of Brexit has not helped.

The US has similarly communicated a less welcoming tone under President Trump, although the year-on-year decline in F-1 student visas commenced in 2016, before Trump came into office.²

These self-inflicted wounds have played to Canada's (and Australia's) advantage. Australian academic and Professor of Higher Education at Oxford, Simon Marginson has lamented that the UK is at risk of giving up its silver medal in international education.

"After more than half a decade in which UK migration politics and Home Office regulation have conspired to hold international student numbers in a flatline trend. ... Australia may have surpassed the UK in 2018, and if not will almost certainly do so in 2019. The UK will be number three."³

In some markets, the UK and US have crashed out of the race. For example, the UK's market share of the globally mobile Indian student population crashed following changes to migration settings in 2011. This is summarized in Box 1.

More recently Australia has faced headwinds for international education.

In 2018, Nous highlighted the risks of highly concentrated growth and polarisation in our landmark report "[Sustainable Growth in International Higher Education](#)". The report showed how strong growth across the Australian higher education sector has relied heavily on either China or South Asia. Almost all Australian universities have been paying serious attention to student diversity.

Since then, issues relating to Chinese international students have emerged, including concerns about lack of diversity in classes, foreign interference, anti-China sentiment and visa delays and rejections.⁴ Regardless of whether these issues are perceived or real, the risks cannot be dismissed. Australia's reputation in China as a safe, high-quality and welcoming study destination may be at stake.

1 All-Party Parliamentary Group on Migration (2015), 'UK post study work opportunities for international students: report', Session 2014-15, www.appgmigration.org.uk.

2 Education Rethink 2020, Rethink 2020 – Five trends to watch

3 Marginson S 2018, The UK in the global student market: second place for how much longer?, Centre for Global Higher Education

4 Sean Rubinsztein-Dunlop. (2019). Are Australian universities putting our national security at risk by working with China?. ABC. Retrieved from <https://www.abc.net.au/news/2019-10-14/chinese-communist-party-gtcom-connection-australian-universities/11586118>

BOX 1: Impact of tightened migration settings on Indian student inflows into the UK

What was the policy change?

The United Kingdom changed its immigration settings following the 2010 General Election. Policy changes included tighter visa settings for international students and closing the post-study work rights for international students.

What other factors had an impact?

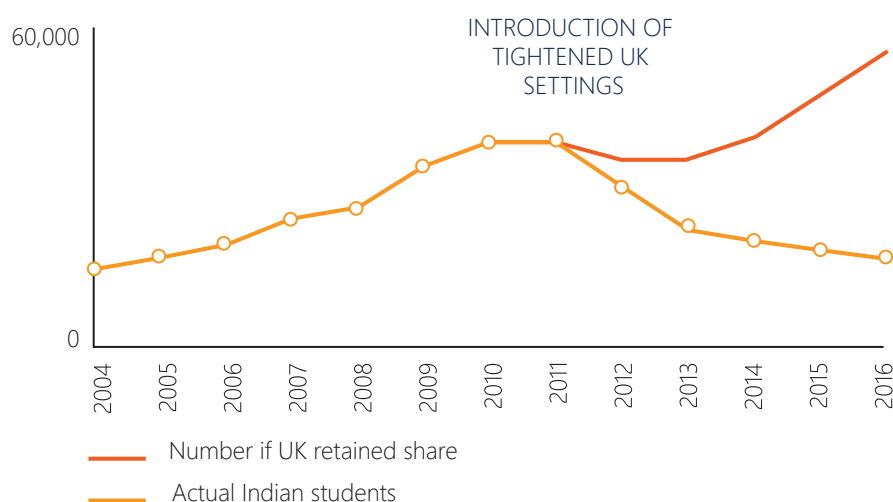
In 2012 Australia introduced the recommendations of the Knight Review. This included access to streamlined visa processing arrangements, enhanced post-study work options, and reduction of visa financial requirements. This impacted the relative attractiveness of Australia at the same time as the changes in the UK.

What was the impact of the UK policy change?

- Student numbers fell for five years before returning to growth in 2017, the UK Higher Education Statistics Agency found.
- Indian student numbers declined over 55 per cent (22,000 students) in the five years to 2016.
- The UK's share of total global Indian student mobility was at 6 per cent in 2016 compared to 19 per cent five years earlier.
- If market share had held at 19 per cent up to 2016, the UK would have received an additional 105,500 commencements over five years.

Overview of change in student mobility

Number of Indian tertiary students studying in the United Kingdom and impact of policy changes 2004 to 2016



Source: Navitas, Nous Group and Austrade 2019, Understanding the impact of country specific policy responses on student mobility, 'Deep Dive' case study #3, International Higher Education Student Flows via Global Data Integration Project.

UK
MARKET
SHARE (%)

13%

14%

19%

16%

9%

6%

Being Gretzky

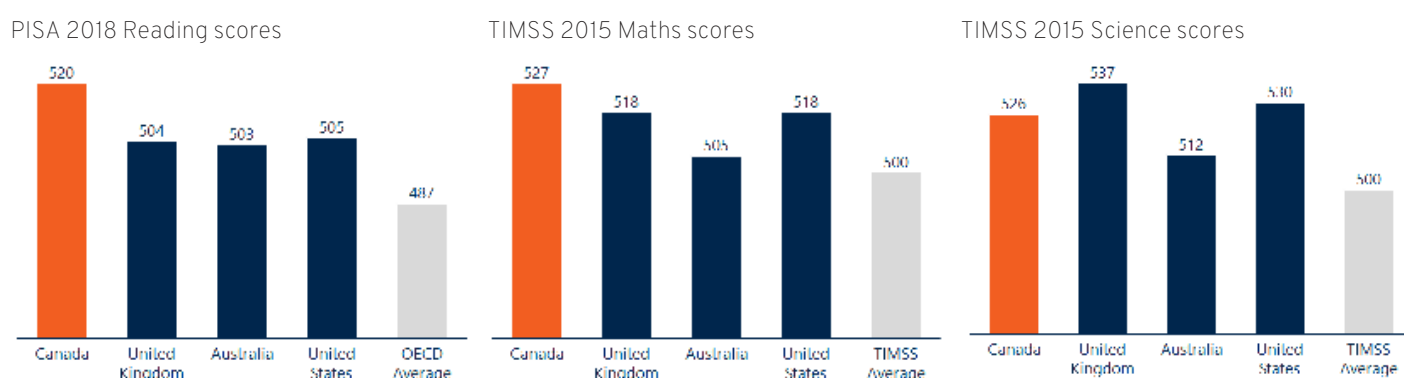
Looking at the issues that challenged the UK, US and Australia, it is easy to assume Canada has “done a Bradbury”. The reality is that Canada is actually just being Gretzky – its good fortune is its own making. There are four points of evidence for this.

The UK, US, Australia and emerging destinations for international education need to play close attention to how Canada’s international education success has been built on much more than the misfortune of others.

1. Canada's high performing education sector

Canada’s school system is consistently recognized as one of the world’s best, and it is this reputation that encourages international students to consider Canada as a destination of choice. Canadian students consistently ranking among the top performers in the Programme for International Student Assessment (PISA) and the Trends in International Mathematics and Science Study (TIMSS).⁵

Figure 2: Scores and rankings in international assessments of school performance

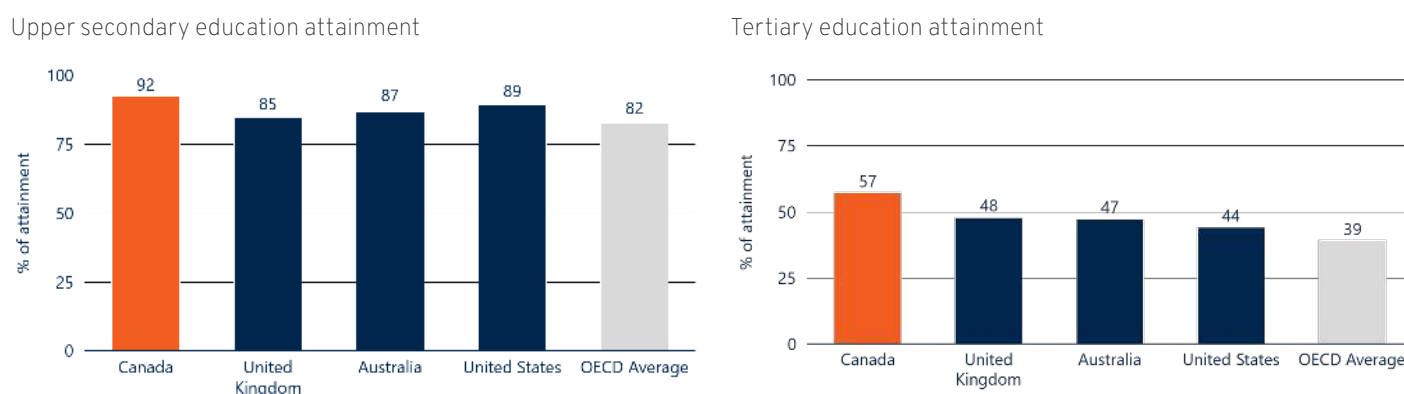


Source: TIMSS. (2015). Maths and Science Results. Retrieved from <http://timssandpirls.bc.edu/timss2015/>

PISA. (2018). PISA 2018 Results. Retrieved from <https://www.oecd.org/pisa/publications/pisa-2018-results.htm>

Canada has among the highest rates of upper secondary attainment and boasts the OECD's highest proportion of 25- to 34-year-olds with a tertiary education (Figure 3).

Figure 3: Educational attainment



Source: OECD. (2015). Education Policy Outlook Highlights: Canada. Retrieved from <http://www.oecd.org/education/highlightscanada.htm>

⁵ https://www.cmec.ca/580/Canadian_Results_%e2%80%94_Grade_8.html and <http://www.oecd.org/education/highlightscanada.htm>

How does Canada achieve these strong educational outcomes? Socio-cultural and historical factors contribute, as does Canada's significant public funding for domestic education. The decline in government grants to universities is often raised as

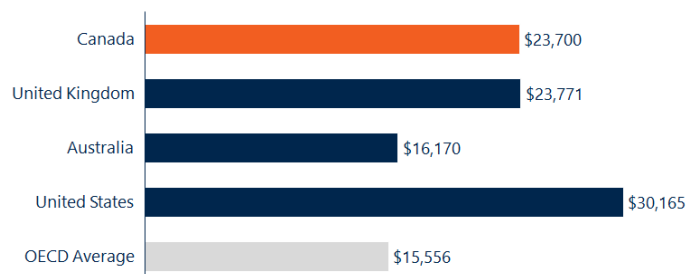
a key reason Canadian institutions have aggressively recruited international students. But annual expenditure per student for tertiary education (including research and development) remains second-highest among OECD countries.

Figure 4: Total investment per student in education (public and private)

Secondary education



Tertiary education



Source: OECD. (2019). Indicator C1. How much is spent per student on educational institutions? Retrieved from <https://www.oecd.org/education/education-at-a-glance/educationataglance2019-dataandmethodology.htm>

2. Canada's pulling power in international education

In examining global study destinations – established, new and emerging – Nous undertook cluster analysis based on three characteristics. The first two – volume and growth – are routinely considered. The third, however, has not been sufficiently measured – the pulling power of a destination country.

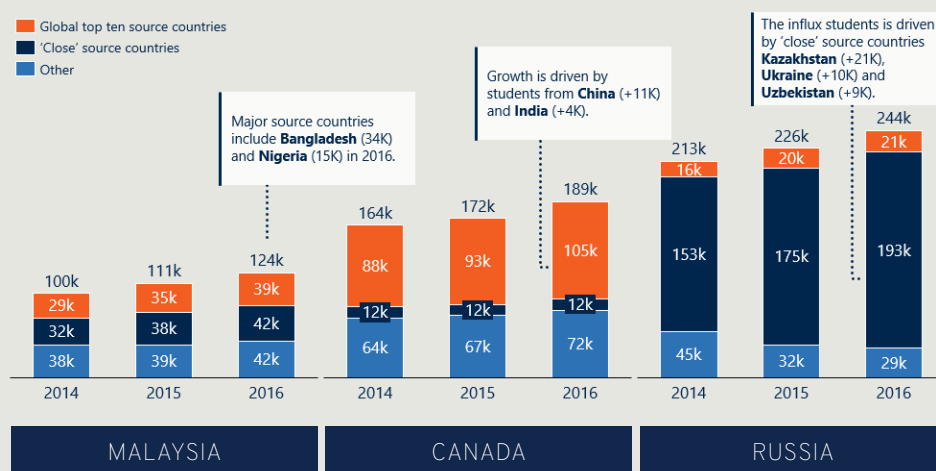
Pulling power considers the extent to which a destination country appeals to students choosing to study overseas, such that those students would overcome geographic and cultural distance.

Social psychologist Geert Hofstede pioneered understanding of cultural differences across nations based on six dimensions

of cultural values: individualism-collectivism, power distance, uncertainty avoidance, masculinity-femininity, long-term orientation, and indulgence. Notionally, cultural distance could range from 0 to 600, however the actual cultural distance ranged from 18 (between the very-similar Lithuania and Estonia) and 318 (between the very-different Denmark and Albania).

Using the Hofstede measure, Canada has achieved rapid growth and volume built on a foundation of strong pulling power. Canada draws international students from a wide variety of countries that are both geographically and culturally different. This is illustrated in Figure 5 with a comparison against two other countries, Malaysia and Russia, that have achieved growth and volume but without Canada's pulling power. (That being said, it is worth noting that Canada attracts students from wealthier source countries than Australia or the US.)

Figure 5: Comparison of growth, volume and pulling power across Malaysia, Canada and Russia



Source: Navitas, Nous Group and Austrade 2019, Understanding the maturity of destination countries and the drivers for emerging destinations, 'Deep Dive' case study #1, International Higher Education Student Flows via Global Data Integration Project.

Notes: 'Global top 10 source countries' is as of 2016. 'Close' source countries are assessed against destination countries and have a 'geographic and cultural distance' of less than 18. Where 'Hofstede' scores were unavailable for a source country, the 'Local' countries were manually assessed.

3. Canada's heterogenous price-product mix

Nous has developed a dashboard comparing cities around the world in terms of tuition fees and cost of living.

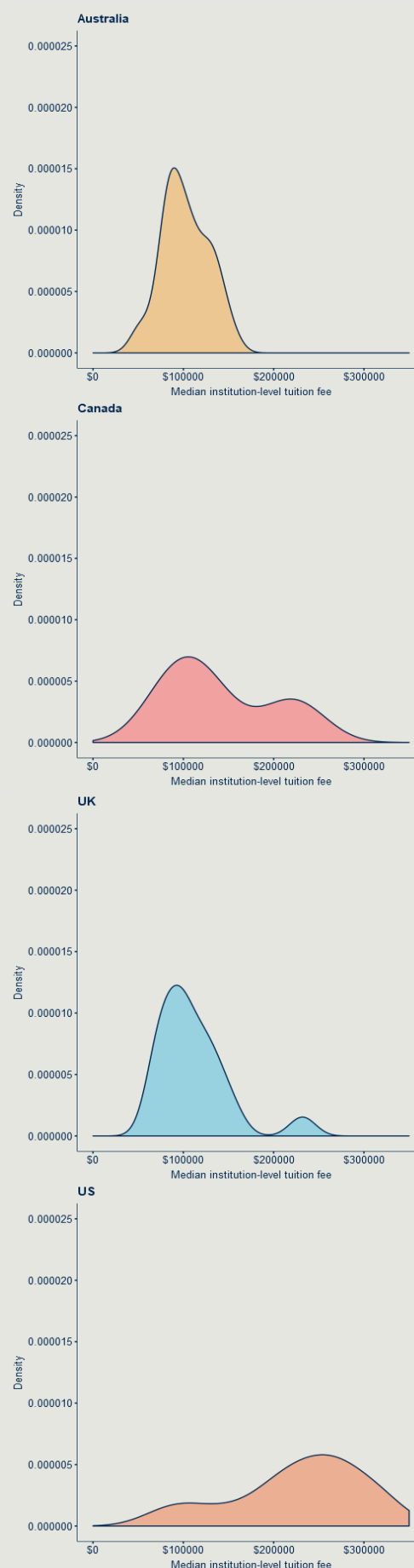
Analysing tuition fees at Australia's universities illuminates that Australia's 39 public universities need to become more diverse. The Australian university sector is based on "a path chosen early and reinforced by national policy, student choice, and academic values", as former University of Melbourne Vice-Chancellor Glyn Davis explains⁶. Today, Davis argues, the sector is "dominated by autonomous, professional, comprehensive, secular, public and commuter universities sharing very similar missions".⁷

The homogeneity in tuition fees for international students is uncanny. As Figure 6 shows, Australia's distribution of higher education price points is exceedingly narrow.

Even though most international students are enrolled in Toronto and Vancouver, Canada still has more diversified range of products at different price points available to international students compared to Australia. As Figure 6 shows, the breadth of price points for undergraduate business programs available in Canada is second only to the US. Canada is on average much more affordable than the US. Like the UK, Canada exhibits a double peak distribution, with many price-competitive programs complemented by more high-end products.

There are other ways to interpret the data. Canada's price-product profile may reflect an immaturity when it comes to scholarships, discounts and bursaries, which is very sophisticated in the US and increasingly prevalent in Australia. Similarly, Canada's price-product profile may reflect unintended underpricing of programs resulting in reduced or even negative yield from its international enrolments.

Figure 6: Density distribution of median tuition fees for undergraduate business degrees by country



Source: Nous Group analysis

⁶ Davis G 2017, The Australian Idea of a University, MUP.

⁷ Davis G 2013, 2013 Newman Lecture, <https://theconversation.com/the-australian-idea-of-a-university-17433>.

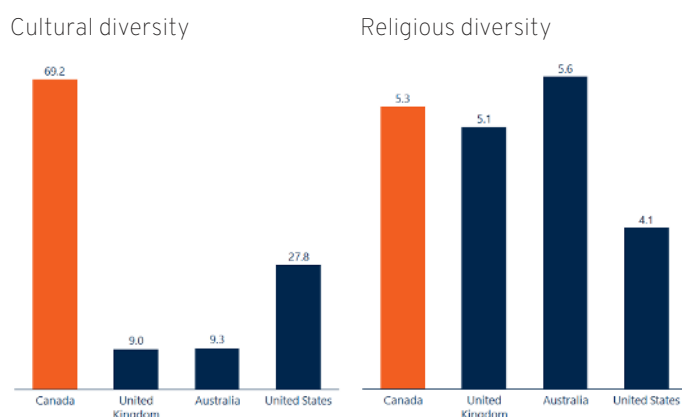
4. Canada's positive approach to immigration and multiculturalism

Students want safe and welcoming study destinations. Multiple factors influence where students choose to study, and countries increasingly compete on total student experience, not just educational outcomes. While no two students make decisions the same way, some consistent factors impact on decisions. A welcoming multicultural environment is hugely important but receives limited attention, often because it is beyond the control of most institutions and government agencies.

The QS International Student Survey confirms that whether a country is warm and welcoming to international students is the most important factor in choice of country. Similarly, IDP's 2019 Student and Parent Buyer Behaviour study found that "cultural differences" are a common concern for parents when they are contemplating sending their children to study internationally. Concerns about cultural differences rank as highly as job prospects after graduation and tuition fees – Canada is often rated highly on both.⁸

With nationalism rising around the world, Canada has a distinct advantage, given its high religious, and cultural and linguistic diversity.

Figure 7: Cultural diversity and religious diversity



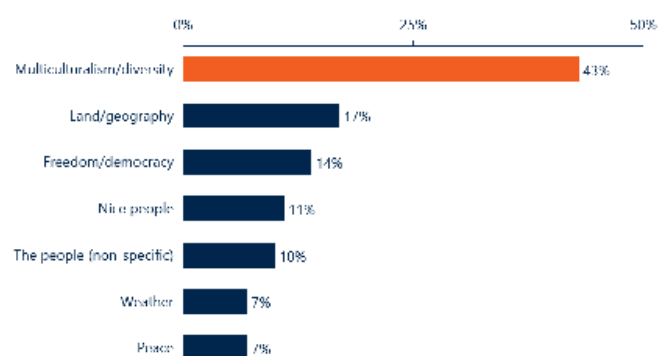
Source: PEW Research Centre. (2014). Religious Diversity Index Scores by Country. Retrieved from <https://www.pewforum.org/2014/04/04/religious-diversity-index-scores-by-country/>

Erkan Goren. (2014). Economic Effects of Domestic and Neighbouring Countries' Cultural Diversity. Retrieved from <https://www.econstor.eu/bitstream/10419/105045/1/V-352-13.pdf>

It is easy to underestimate the extent to which multiculturalism is a defining feature of Canadian society. The rest of the world may marvel at the ethnic diversity in Prime Minister Trudeau's Cabinet, but this is an accurate reflection of Canadian society.

When Canadians have been surveyed on what makes their country unique, the most popular response was multiculturalism/diversity at 43 per cent, followed by geography at 17 per cent and freedom/democracy at 14 per cent.⁹ Canada now leads the world in absolute numbers of refugee resettlements.¹⁰

Figure 8: Most popular reasons Canada is unique according to citizens



Source: Government of Canada. (2019). Annual Report on the Operation of the Canadian Multiculturalism Act 2017 – 2018. Retrieved from <https://www.canada.ca/en/canadian-heritage/corporate/publications/plans-reports/annual-report-canadian-multiculturalism-act-2017-2018.html#fn5>

⁸ https://1wn677fmgvkl0mo1f4njtr-wpengine.netdna-ssl.com/wp-content/uploads/2019/10/IDP_Connect_BuyerBehaviour_2019_infographic.pdf

⁹ <https://www.canada.ca/en/canadian-heritage/corporate/publications/plans-reports/annual-report-canadian-multiculturalism-act-2017-2018.html#fn5>

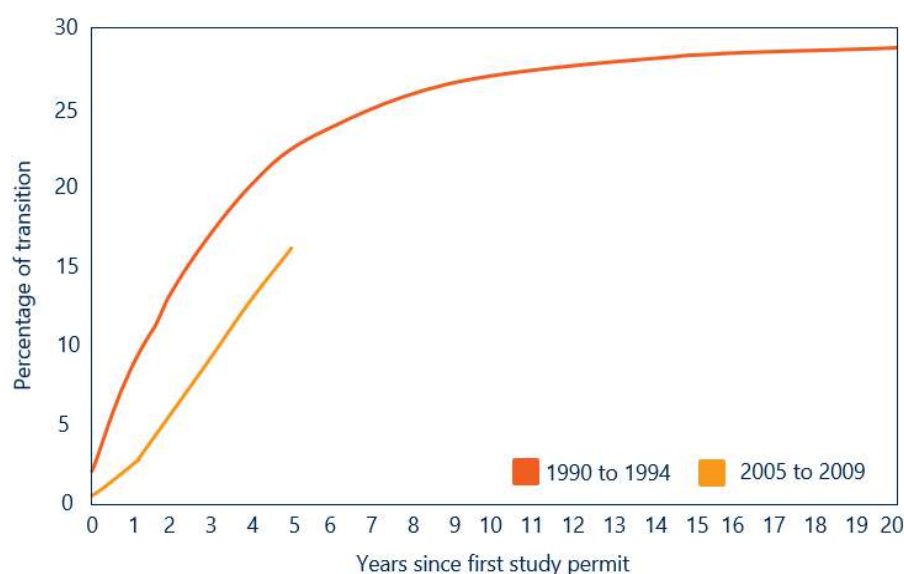
¹⁰ <https://www.pewresearch.org/fact-tank/2019/12/13/19-striking-findings-from-2019/>

Many argue that Canada's international education success is underpinned by its generous pathways into residency. The historical cumulative transition rate from a student visa to permanent residency in Canada is indeed higher than that in Australia – see Figure 9. StatCan reports that between 20 per cent and 27 per cent of international students become permanent residents in the 10 years following their arrival on a study permit.¹¹ In Australia, between 2000 01 and 2013 14, 16 per cent of student visa holders eventually transitioned to permanent residence¹²

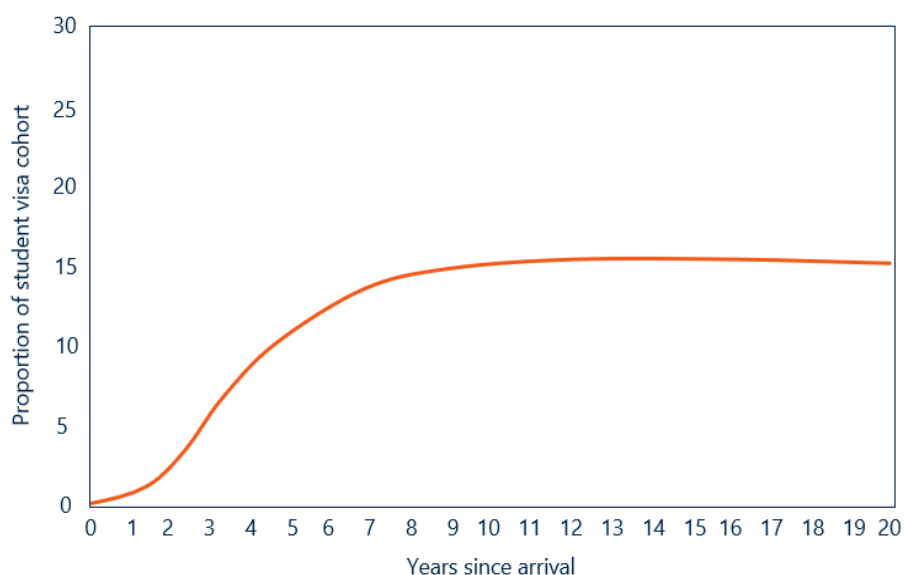
However, the cumulative transition rates for international students in Canada has fallen since the early 1990s. International students arriving from 2005 to 2009 look longer to transition to permanent residence and do so at a slightly lower rate.

Figure 9: Cumulative transition rates to permanent residence for student visa holders

Canada



Australia



Source: The Treasury and Department of Home Affairs 2018, Shaping a nation, Population growth and immigration over time. StatCan 2015, International students who become permanent residents in Canada.

11 https://1wn677fmgvk1ql0moif4njtr-wpengine.netdna-ssl.com/wp-content/uploads/2019/10/IDP_Connect_BuyerBehaviour_2019_infographic.pdf

12 <https://www.canada.ca/en/canadian-heritage/corporate/publications/plans-reports/annual-report-canadian-multiculturalism-act-2017-2018.html#fn5>



Threats to Canada's success

Canada's International Education Strategy goal for 2022 was to have 450,000 international students across all sectors. But it surpassed that goal by the end of 2017. Even with a powerhouse performance and the strengths outlined in the section above, it is nonetheless worth considering the threats to growth and the pitfalls that have ensnared other market leaders like Australia in the past.

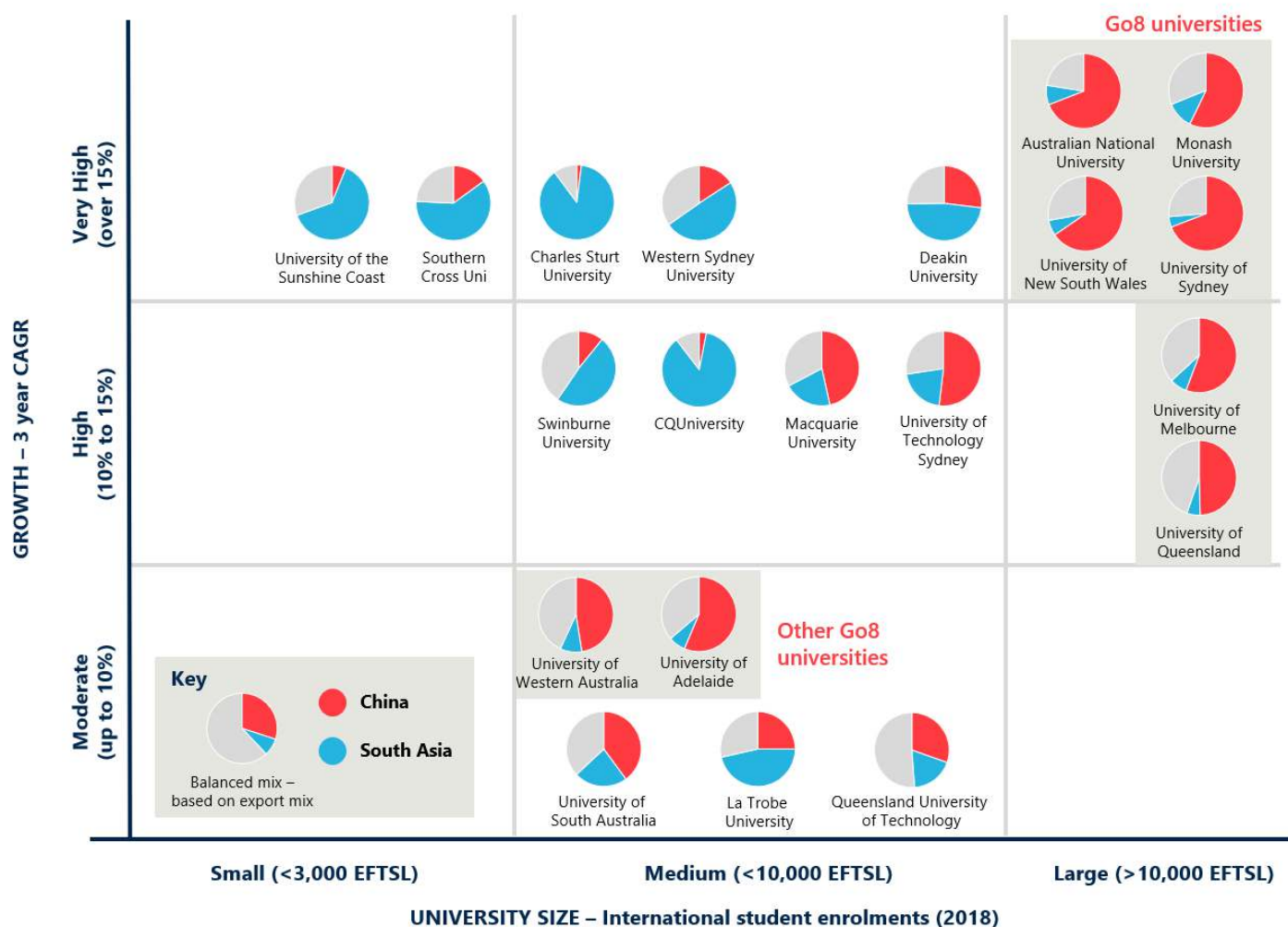
Threat 1: Unbalanced growth

Nous's report on "Sustainable Growth in Higher Education" was the first comprehensive examination of Australia's dual trends of concentration (growth comes from a few countries going to a few cities/institutions) and polarisation ("China universities" and "India universities").

Figure 10 shows how strong growth in higher education has relied heavily

on either China or South Asia. Those institutions towards the top of the chart have grown the strongest and tend to have either Chinese (red) or South Asian (blue) students dominating the international student body. Those that have a more balanced profile tend to not have grown as much. The Australian evidence begs the question – can Canadian universities buck this trend and achieve growth that is both strong and diversified?

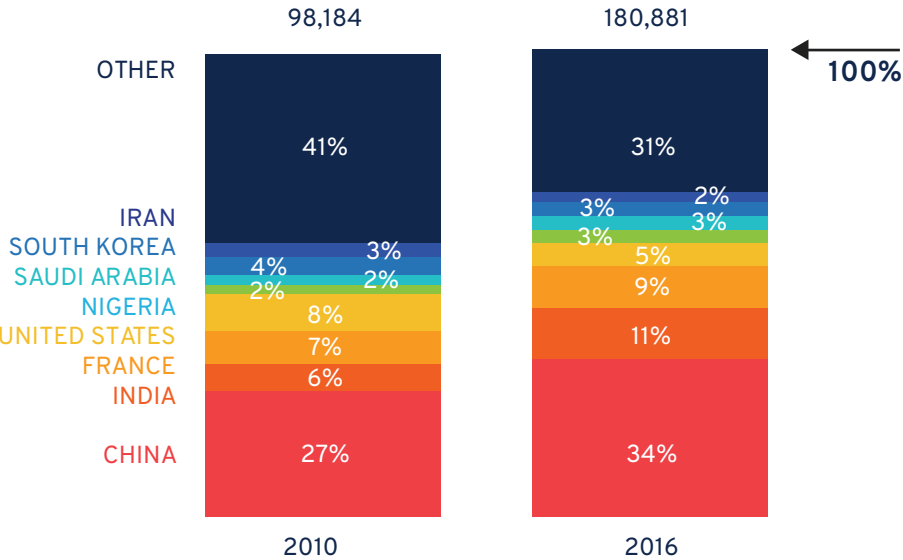
Figure 10: Growth, size and source country reliance among Australian higher education institutions



Source: Nous analysis

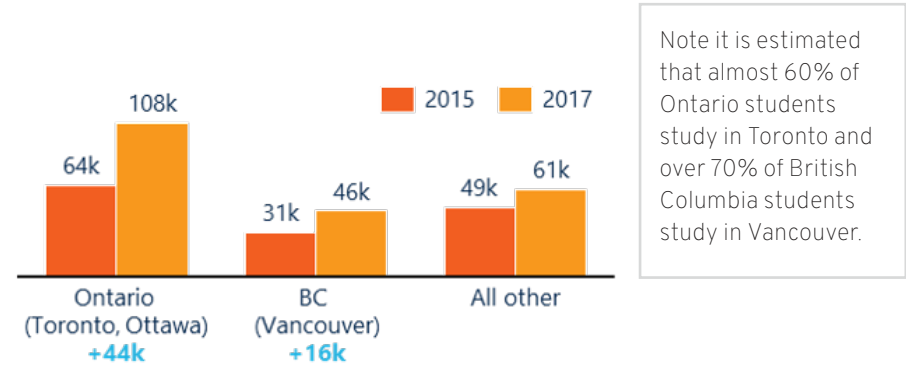
There is evidence this concentration and polarisation is playing out in Canada. Trends in global student flows show that growth in Canadian higher education has been driven by China and India – 60 per cent of the net increase from 2010 to 2016 came from China and India. As Figure 11 shows, 45 per cent of international students in Canada are from China or India (up from 33 per cent) – and similar to Australia’s 48 per cent. For many institutions, a focus on China or India has been the price for rapid enrolment growth.

Figure 11: Growth, size and source country reliance among Canadian higher education institutions



In the same way that Sydney and Melbourne attracted the lion’s share of international students in Australia, Toronto and Vancouver are the destinations of choice in Canada by a wide margin – as shown in Figure 12.

Figure 12: Commencing post-secondary permit holders by province/territory



Axiom 1: There will always be a link between study and migration – even if only in the minds of prospective students.

Axiom 2: There is an inherent conflict between increasing the size of the international education sector and reducing the risk to integrity of migration controls.

- Knight Review 2011

Threat 2: Overheating migration

The Knight Review of Australia's Student Visa Program articulated two axioms that link international education and migration.

To tackle the bubble in international student enrolments that emerged on the basis of Axiom 1, the Knight Review triggered substantial reforms to decouple study from migration outcomes, and the recommendations of the review also led to more generous post-study work rights. But over time, these connections re-emerge in different ways, as a result of Axiom 2.

Debate around post-study migration has historically focused on permanent migration, but the distinction between permanent and temporary migration has become blurred. Researcher Peter Mares has highlighted the emergence of multi-step migration, whereby an international student might cycle and re-cycle through three or more visas over six or more years before achieving permanent residence.¹³

Post-study work rights (PSWR) have blurred temporary and permanent migration. In the emerging PSWR arms race:

- New Zealand in 2018 introduced a three-year open work visa for graduates, after just two semesters of onshore study.¹⁴
- The UK has reintroduced its two-year post-study work visa for international students¹⁵ leading to reports of a large turnaround in student recruitment from South Asia.
- Australia has recently extended PSWR in regional areas to four years.¹⁶

- Canada's Post-Graduation Work Permit Program (PGWPP) has continued to boom, with the number of permit holders doubling from 2013 to 2018.

Notwithstanding the recent changes in the UK and Australia, Canada has the most favourable migration settings, including post-study work and transition to residence,¹⁷ reflecting the government positioning Canada as a front door migration destination for international students.

However, new reports in Canada and Australia show the risks of over-promising and under-delivering on temporary and permanent migration.

Australia now leads the world with a maximum four-year post-study work visa for students that study and continue to live in regional areas, but recent studies suggest it may not be delivering on the promise. A recent report from the International Education Association of Australia (IEAA) found that 17 per cent of PSWR visa holders continue to work in low-skill occupations in retail, wholesale and hospitality, and more than one in five are unemployed.¹⁸ Two jurisdictions (Tasmania and the Australia Capital Territory) have attracted adverse attention for over-promising on pathways to permanent residence, with some students threatening legal action.

Canada has faced similar consternation – the strong growth in international students has outpaced places for permanent residence under fast-track programs.

Experts in immigration policy say that governments earn permission for more open and larger migrant intake by demonstrating that they are tough on border control. As Axiom 2 suggests, countries in the race to offer more and more attractive post-study migration options eventually become victims of their own success.

¹³ <https://www.sbs.com.au/allworknostay/>

¹⁴ Berquist, B., Hall, R., Morris-Lange, S., Shields, H., Stern, V., & Tran, L. T. (2019), 'Global perspectives on international student employability', International Education Association of Australia (IEAA)

¹⁵ British High Commission New Delhi (2019), 'UK announces 2-year post-study work visa for international students', World News, 11 September 2019.

¹⁶ Department of Home Affairs (2019), 'Extra options for international graduates from regional institutions', accessed at <https://immi.homeaffairs.gov.au/what-we-do/regional-migration/news/new-regional-visas>

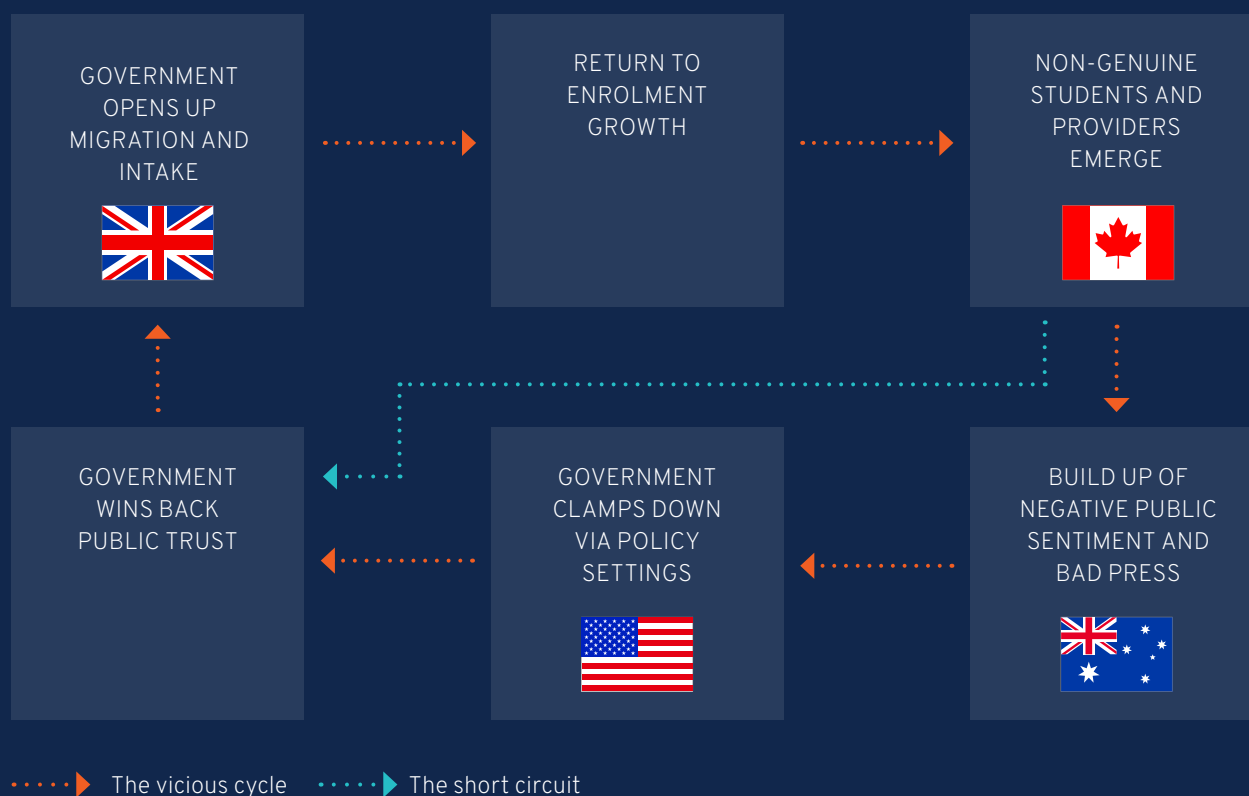
¹⁷ https://lwn677fmqvk1gl0mo1f4njtr-wpengine.netdna-ssl.com/wp-content/uploads/2019/10/IDP_Connect_BuyerBehaviour_2019_infographic.pdf

¹⁸ Chew J 2019, Economic opportunities and outcomes of post-study work rights, IEAA.

Figure 13 depicts the typical vicious cycle in post-study migration policy, and identifies where Australia, the US, Canada and the UK are in the cycle. Canada appears to be moving into the downturn phase, whereby negative public sentiment and bad press will force the government to take a less favourable post-study migration stance. One hope for Canada is that governments at different levels circumvent the most adverse stages of the cycle by quickly dealing with non-genuine students and providers, winning back public trust.

It is worth acknowledging that immigration was not as significant an issue in the 2019 elections as some expected. Recent surveys show that the majority of Canadians have continued to have positive views on the number of immigrants living in Canada and the benefits they bring to the economy.¹⁹

Figure 13: The vicious of post-study migration policy



Source: The Knight Review

¹⁹ <https://www.environicsinstitute.org/projects/project-details/canadian-public-opinion-on-immigration-and-refugees>



Threat 3: Turning on the taps after COVID-19

There are two strategies for universities, colleges and schools to grow international student recruitment. Nous distinguishes between the immediacy of 'turning on taps' rather than the longevity of 'digging wells', as illustrated in the figure below.

All institutions need to be effective at turning on taps, but this needs to be balanced against the longer-term investments of digging wells, including:

- product-led strategies that differentiate universities, built on the leadership of academics and faculty and a clear underlying course architecture
- improving student experience inside and outside the classroom, backed by meaningful and targeted investment
- delivering value and yield (as opposed to enrolments and market share) to the institution, and ultimately delivering a strong value proposition for the student.

With global mobility curtailed during the COVID-19 pandemic, institutions risk addressing the immediate recruitment and revenue shortfall by turning on taps that have the greatest short-term effect. For institutions that have not invested in digging wells, taps may be all that is available.

TURNING ON TAPS...

- ✓ Ratcheting up agent commissions
- ✓ Deploying additional offshore staff
- ✓ Maximum efficiency in application and admissions turnarounds
- ✓ Aggressive scholarship and discounting strategies
- ✓ Branch campuses in Toronto and Vancouver

...delivers concentrated short-term growth and market share.

DIGGING WELLS...

- ✓ Improvements in the course portfolio/ product offering
- ✓ Improvements in student experience and welfare in and out of the classroom
- ✓ A focus on employment outcomes including work-integrated learning
- ✓ A focus on delivering yield to the university and value for money to students

...delivers diversified long-term value propositions for all parties.

How to keep being a Gretzky

This paper has explained why in the international education race Canada has not "done a Bradbury" despite what some external observers might believe. Canada has much to offer, but this does not mean every institution has achieved peak performance through strategic nous, operational competence and targeted investment. Many institutions have ridden the momentum of Team Canada and will need to be more diligent at turning on taps and digging wells in coming years.

No hockey player has come close to Gretzky's record of achievement, so it seems appropriate to end with a quote from the legend himself. Many quotes have been overused (and misappropriated), so perhaps an excerpt from Gretzky from the 2002 Winter Olympics is most fitting.

Two days after Steven Bradbury earned himself a permanent place in Australian sporting folklore (and colloquialism), Gretzky, then Executive Director of Team Canada delivered a memorable message:

"We respect every team we play. We don't dislike them. Maybe when we start to dislike them, we play better. I don't think we dislike these countries as much as they hate us and that's a fact. They don't like us. They want to see us fail. They love beating us. And we've got to get the same feeling toward them."

Team Canada would go on to win the gold medal of course, and some mark Gretzky's speech as the turning point in their campaign.

Nous Group is an international management consulting firm with deep expertise in higher education in the UK and Australia. Nous has recently opened an office in Toronto to serve its growing Canadian client base.



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