

## Introduction to international education

Janelle Chapman, IEAA Vice-President; and Executive Director, TAFE Queensland International  
Mystique Nelis, Data Analyst and Research Adviser, Austrade  
Steve Nerlich, Director, International Research & Analysis Unit, Department of Education  
Heidi Piper, Director, Griffith International, Griffith University



## Name, Organisation, Role

- How long have you worked in international education?
- Is this your first AIEC?
- Why are you attending AIEC?

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# Your Hosts: IDP Education

A globally leading international education services organisation

Student Placement



Leading provider of international student recruitment services, with global network spanning more than 30 countries

English Language Testing



Co-owners of the leading global high-stakes English Language Test (IELTS)

Digital Marketing & Events



Online and offline marketing services for universities and college's international student recruitment activities.  
(Formerly Hotcourses Group)

English Language Teaching



Operators of 9 leading English language schools in Cambodia and Vietnam

# Your Hosts: IEAA



## The peak body for international education in Australia



Provide advocacy and member services relevant to academics, teachers and professional staff across all sectors.



Deliver high-quality professional learning opportunities to advance members' careers and enhance the quality of Australian international education.



Drive new research to highlight emerging trends, inform strategy and policy and enrich Australia's knowledge base.



Collaborate with affiliate bodies, corporate partners and government to promote the benefits of international education to the broader community.

Above all, we support approaches to international education that realise its transformative potential for all students and its positive impact on societies (local, national and global).



# What is international education?

International education is a means to enable **students** to think with an **international** or **global** perspective.

Connecting with different societies and belief systems helps students to understand and embrace cultural differences and similarities.

# Why is international education important to Australia?

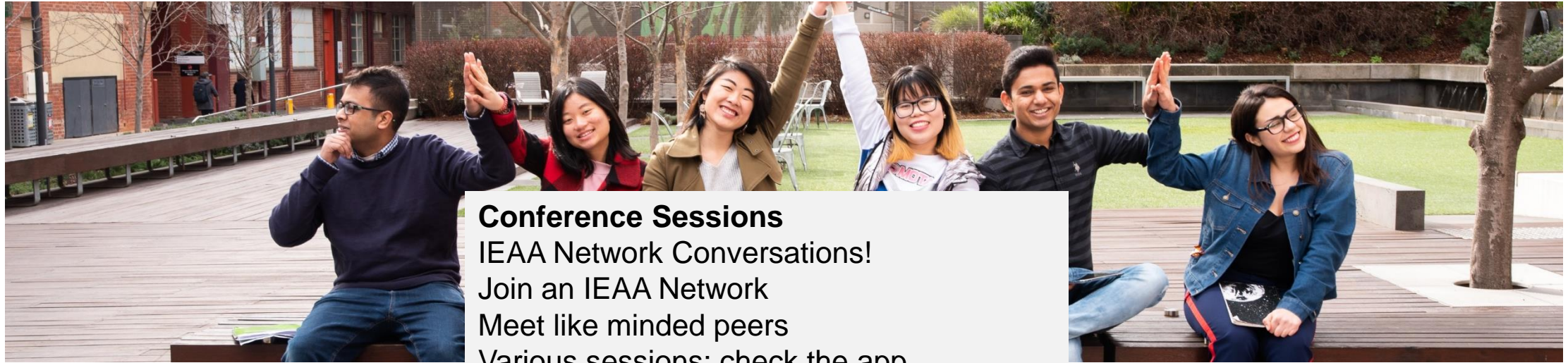




## What does it encompass?

- Global teaching and learning
- Research collaboration
- Marketing and recruitment
- Admissions and compliance
- Student administration and student experience
- Pathways and English language
- Transnational education (TNE)
- Partnerships, relations and networks
- Learning abroad / student mobility
- Scholarships and fellowships





## **Conference Sessions**

IEAA Network Conversations!

Join an IEAA Network

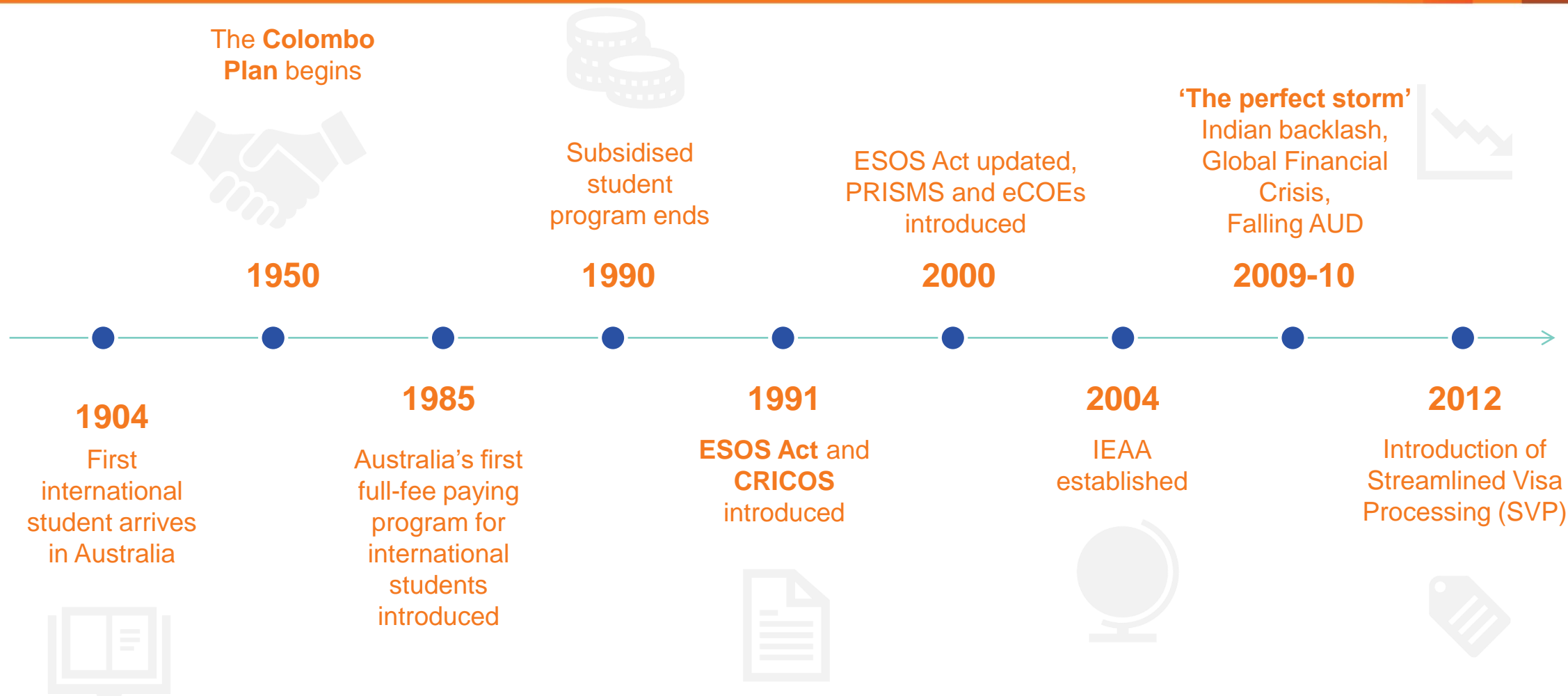
Meet like minded peers

Various sessions: check the app

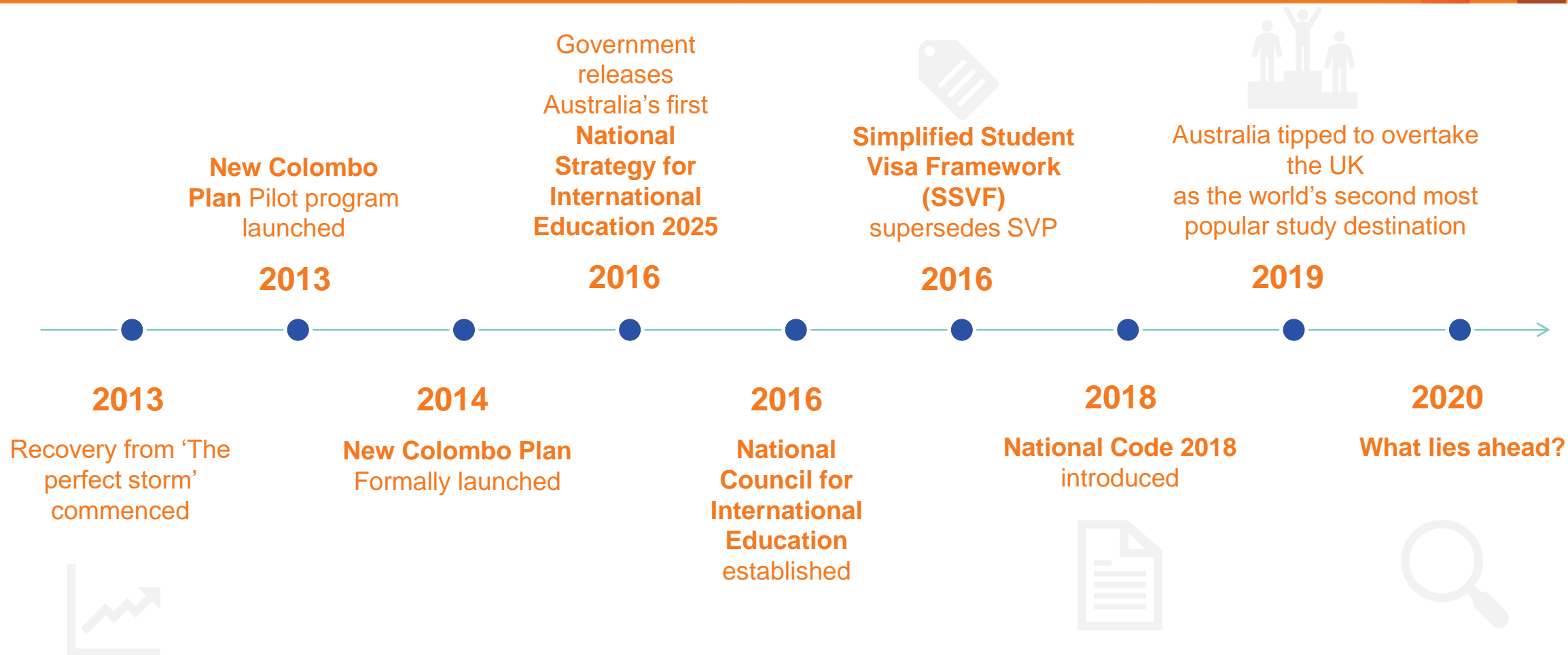
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# A brief history



# A brief history



- The value might be measured by:
  - Collaborative research output
  - Top 3 student destination countries
  - Overall economic contribution
  - Number of Australians who benefit (e.g. employed in sector, outbound students)
  - Brand recognition
  - Digital delivery measurement
  - Market share metric.



# Competitor destinations and targets

COUNTRY	TARGET	YEAR
Australia	Forecasting \$940k by 2025. No actual targets.	2025
NZ	Increase economic value to \$6bn (revised up from \$5bn in 2018)	2025
Canada	Announced new strategy in March 2019, investing CA\$147m and \$8m per year after that	2022
China	Attract 500k international students – <i>492K in December 2018</i>	2020
Japan	Double number of foreign students to 300k – <i>299K in December 2018. Will exceed</i>	2020
Malaysia	Attract 250k international students	2025
Russia	Triple international student enrolments to 710k	2025
UK	Increase numbers by 30% (458k > 600k). Increase export value from £20bn to £35bn.	2030
Germany	Attract 350k international students – <i>Achieved</i>	2020
South Korea	Host 200k visiting students – <i>On track with 142k in 2018</i>	2023
France	Host 500k international students. Requires an average annual growth rate of 5%.	2027
Turkey	Host 200k international students – <i>Revised up to 350k without a timeframe</i>	2022
Ireland	Increase foreign student enrolment in HE by 33% and ELT by 25%	2020



# Key Federal Ministers

## Education and Training



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**Dan  
Tehan**

Minister for  
Education



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**Michaelia  
Cash**

Minister for  
Employment, Skills,  
Small and Family  
Business



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**Karen  
Andrews**

Minister for  
Industry, Science  
and Technology

# Key Federal Ministers

Immigration, foreign affairs and trade



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**David Coleman**

Minister for  
Immigration,  
Citizenship, Migrant  
Services and  
Multicultural Affairs



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**Marise  
Payne**

Minister for  
Foreign Affairs



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**Simon  
Birmingham**

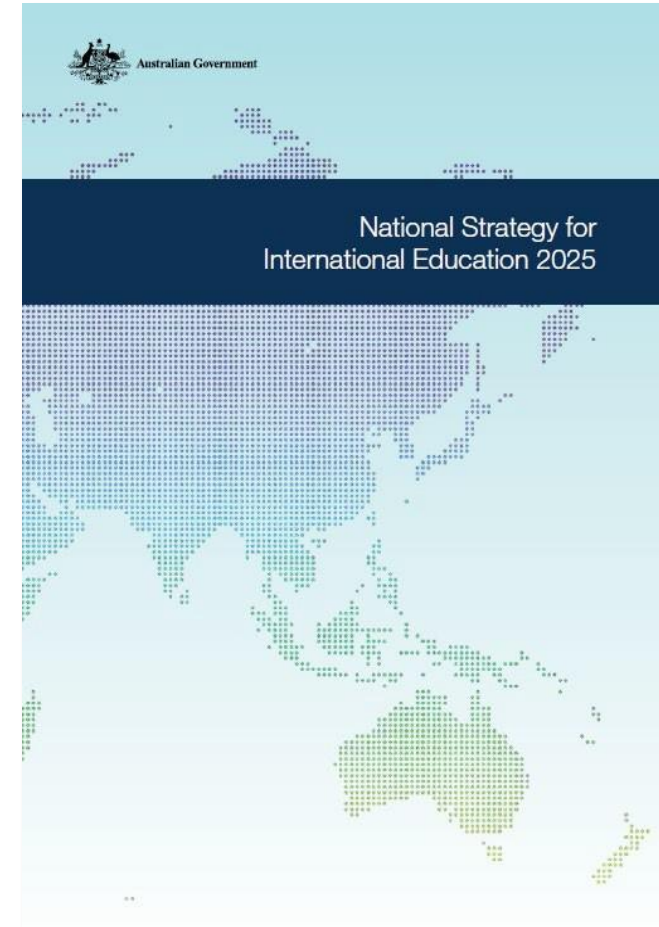
Minister for Trade,  
Tourism and  
Investment

## National Council for International Education

- Established in 2016, in response to an external review of the sector (Chaney Report)
- The first of its type in the world, it comprises:
  - 6 Federal Ministers
  - 11 non-ministerial members
- Facilitates better coordination between various government departments and encourages a collaborative response to important issues:
  - Student visa system; teaching and learning standards; safe, affordable accommodation; employability etc.

## National Strategy for International Education 2025

- The Council has responsibility for implementing Australia's first National Strategy for International Education
- Structured around the three pillars:
  - Strengthening the fundamentals
  - Making transformative connections
  - Competing globally
- Includes funding of AUD12 million over four years through its 'Enabling Growth and Innovation (EGI)' grants program.



## National

- Education Services for Overseas Students (ESOS) Act
- Migration Act

## State/territory

- State legislation

## Providers

- Institutional policies & procedures

## ESOS Framework



- Legislation and standards placing obligations on education providers for international students
- Provides tuition fee protection for international students
- Supports the integrity of the student visa program
- Protects and enhances Australia's reputation for quality education.

## Quality assurance



- Australian Qualifications Framework (AQF)
- Tertiary Education Quality and Standards Agency (TEQSA) / Australian Skills Quality Authority (ASQA)
- CRICOS registration and ongoing monitoring of courses/providers.

# Simplified student visa framework (SSVF)

- All providers under one framework
- Evidence level is a combination of the education provider and the country of citizenship.
- Based on immigration outcomes of student visa holders in the previous 12 months
- Financial capability and English proficiency requirements are determined by evidence level.

		COUNTRY EVIDENCE LEVEL		
		1	2	3
EDUCATION PROVIDER EVIDENCE LEVEL	1	S	S	S
	2	S	S	R
	3	S	R	R

## Education agent performance data

- DET Education Agent Performance Data policy paper:
  - Aims to provide greater transparency between agents for providers and students to make more informed choices
  - Gives agents a better understanding of their own performance, relative to their peers and encourages continuous improvement.
- Feedback from IEAA members and the broader sector:
  - Confidentiality of agent performance data between providers is paramount
  - Little support for more regulation, but better application of existing mechanisms to protect Australia's standing.

73 per cent of international student enrolments used an education agent in 2017.



# Sector peak bodies



## Policy settings

1

Student visas

Post-study work rights (PSW)

Skilled migration

## Growing the regions

2

Rapid growth in capital cities has led to infrastructure constraints

Push to encourage students to regional areas

Government recently announced:

Additional year of PSW for students who study in a regional location

AU\$15,000 scholarships for domestic and international students to study in the regions.

## Student experience 3

- Consistent and accurate pre-departure information (*Universities Australia*)
- Safe, affordable, purpose-built accommodation
- Reducing workplace exploitation (*Migrant Worker Taskforce report*)
- Enhancing mental health of international students (*English Australia*)

## Employability 4

- National WIL taskforce and strategy established to create and promote opportunities for even more students
- Quality indicators of Learning and Teaching (QILT)
- AUIDF International Graduate Outcomes survey (2016)

**[ieaa.org.au/employability](http://ieaa.org.au/employability)**

## **Global competition**

# 5

Within Australia

From other destination markets

Rapidly improving education systems  
within source markets

Market volatility

Political, economic, social,  
technical, legal, environmental



Go to the AIEC App

## The \_\_\_\_\_ ? Framework

- Is legislation and standards placing obligations on education providers for international students
- Provides tuition fee protection for international students
- Supports the integrity of the student visa program
- Protects and enhances Australia's reputation for quality education.

a. ASQA      b. TEQSA      c. ESOS      d. IEAA

In 2018 (full year) **VET** International Student Enrolments in Australia were equal to

- a. Almost 215,000
- b. Almost 245,000
- c. Almost 155,000
- d. Almost 185,000

USA, China, Germany and France are top 10 \_\_\_\_\_

- a. Destination Countries
- b. Source Countries
- c. Destination and Source Countries



Which of the following countries is **not** one of the top 4 source countries for Australia in 2019?

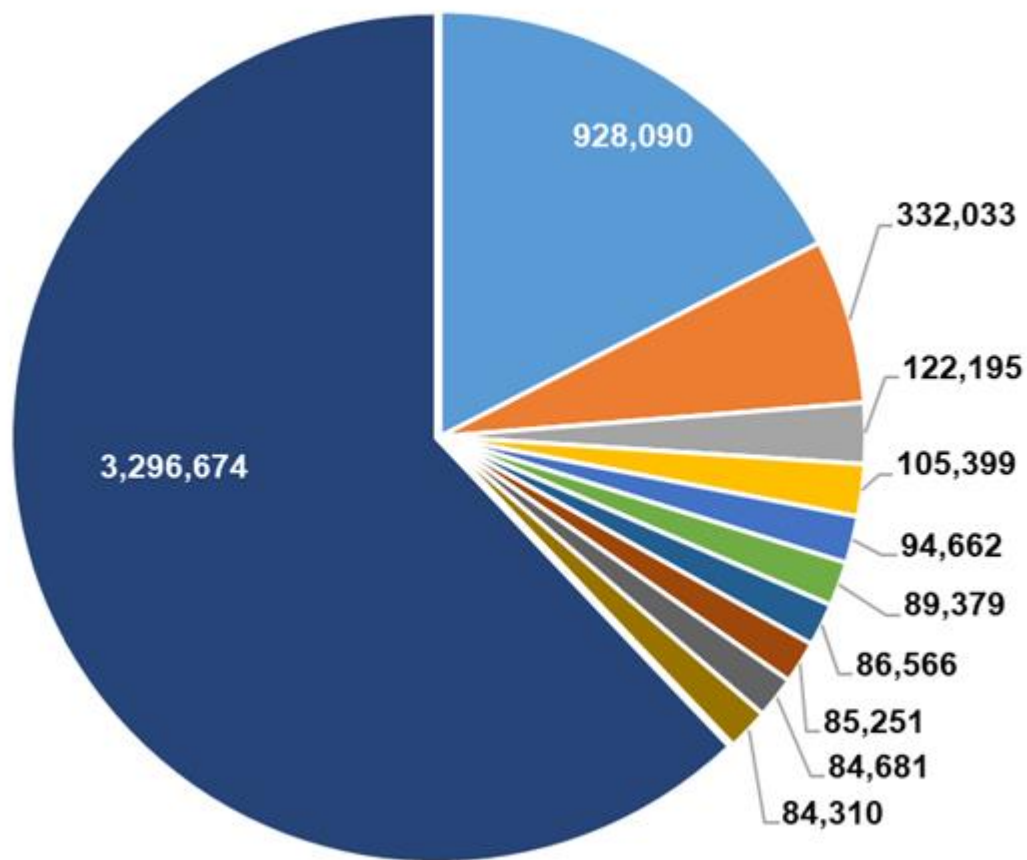
- a. Nepal
- b. Vietnam
- c. China
- d. Indonesia

In 2017 almost \_\_\_\_\_ Australian students had an overseas study experience.

- a. 20,000
- b. 30,000
- c. 40,000
- d. 50,000

# Top ten international student origins

5.3 million international tertiary students worldwide in 2017



Source: UNESCO-UIS

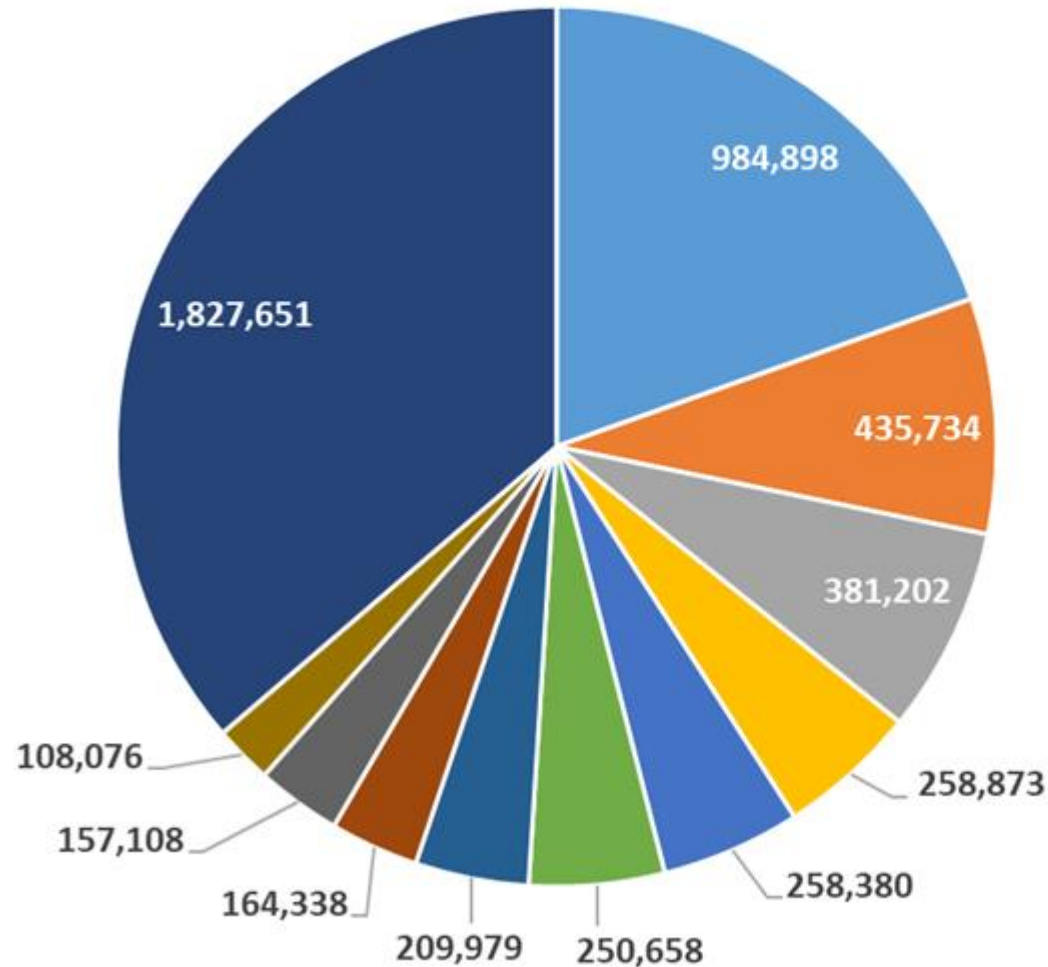
## Change from 2016

China	7%
India	9%
Germany	3%
South Korea	0%
Viet Nam	15%
France	-2%
USA	3%
Nigeria	-12%
Kazakhstan	-6%
Saudi Arabia	-7%
Other	4%

**World 4%**

# Top ten international student destinations

5.3 million international tertiary students worldwide in 2017



Change from 2016

USA	1%
UK	1%
Australia	14%
Germany	6%
France	5%
Russian Federation	3%
Canada	11%
Japan	15%
China	14%
Turkey	23%
Other	-5%

**World** **4%**

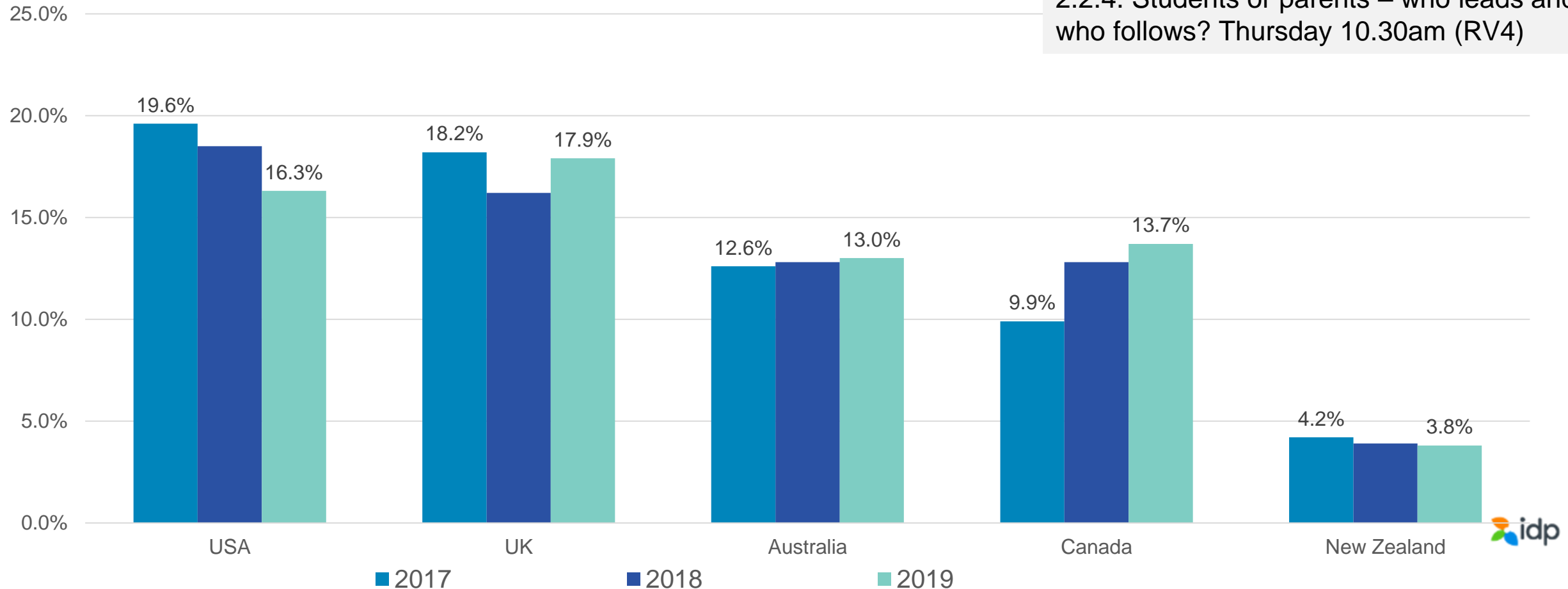
Source: UNESCO - UIS

# IDP DIGITAL PLATFORM SEARCH TRENDS

## Key English Speaking Destinations

### Conference Session

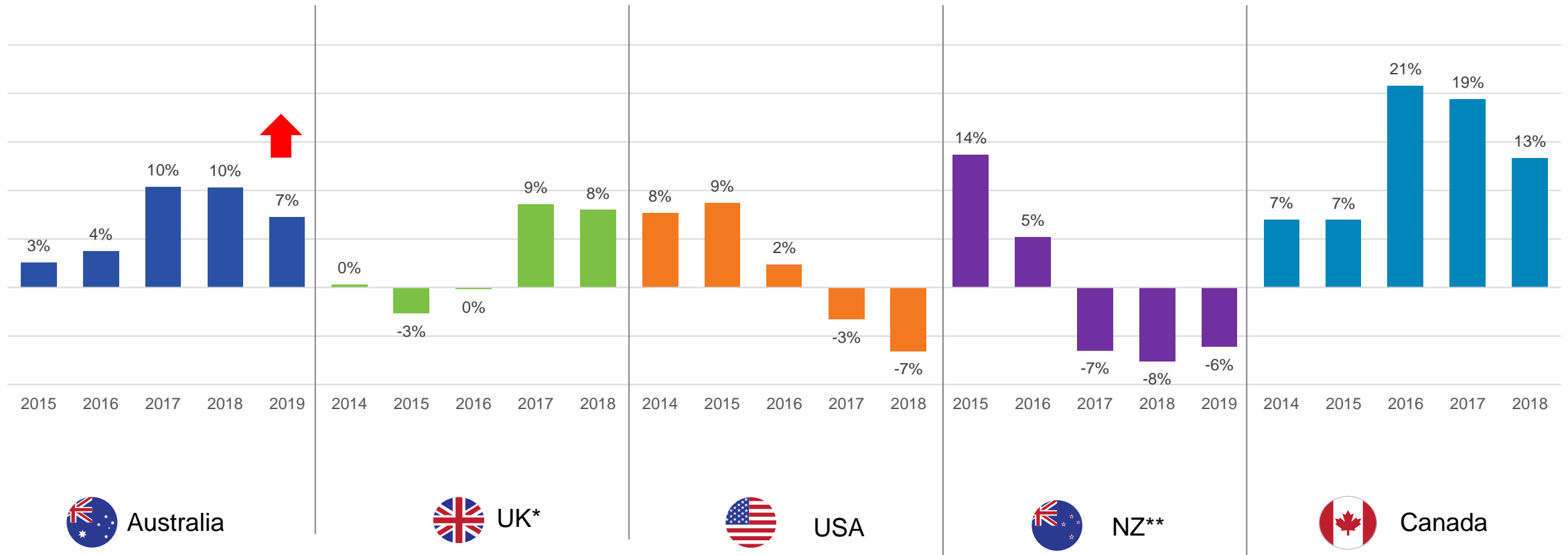
2.2.4. Students or parents – who leads and who follows? Thursday 10.30am (RV4)



# VISA GRANT TRENDS

## Key English Speaking Destinations

Year on year % change in student visas issued by study destination\*



Data based on Australia – total, Canada – total, NZ – full-fee paying, UK - offshore, non-EU only, US – HE only

\* USA visa data not shown as it is not comparable to previous years due to changes in visa policy and processes; alternatively Open Doors new enrolments data is shown

Sources: Australia Dept of Home Affairs, Canada CIC, NZ Department of Labour (Immigration), UK Home Office, US Institute of International Education. Open Doors Report.

# Looking forward with data

## Visa data:

- Lodgements – applications for visas
- Grants – visas granted
- Growth rates for January - July 2019 (compared to January - July 2018):
- All lodgements **10%**; **offshore** lodgements 5%      All grants **6%**; **offshore** grants 2%





# Understanding the nuances

What's the difference between students, enrolments and commencements?



## Students

The number of students in the country



## Enrolments

The number of courses in which students are enrolled

A good reflection of **historic trends**



## Commencements

A cumulative count of new course enrolments

A good indicator of **current trends**



# How many international students in Australia?

# 693,750

In 2018, international students studied in Australia – up by 11% on 2017



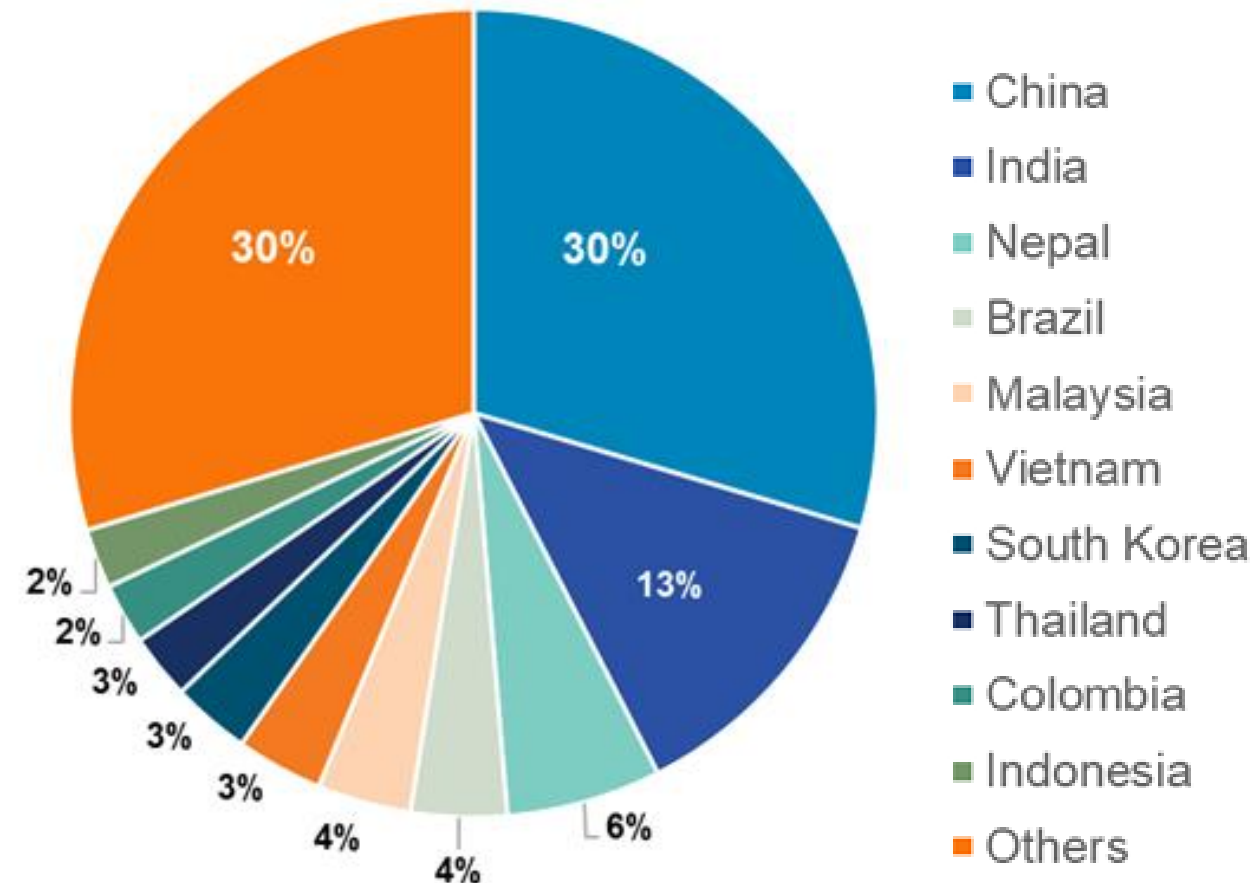
**almost 1 in 50  
people in  
Australia.**

Student numbers in 2018

Source: Department of Education

# How many international students in Australia?

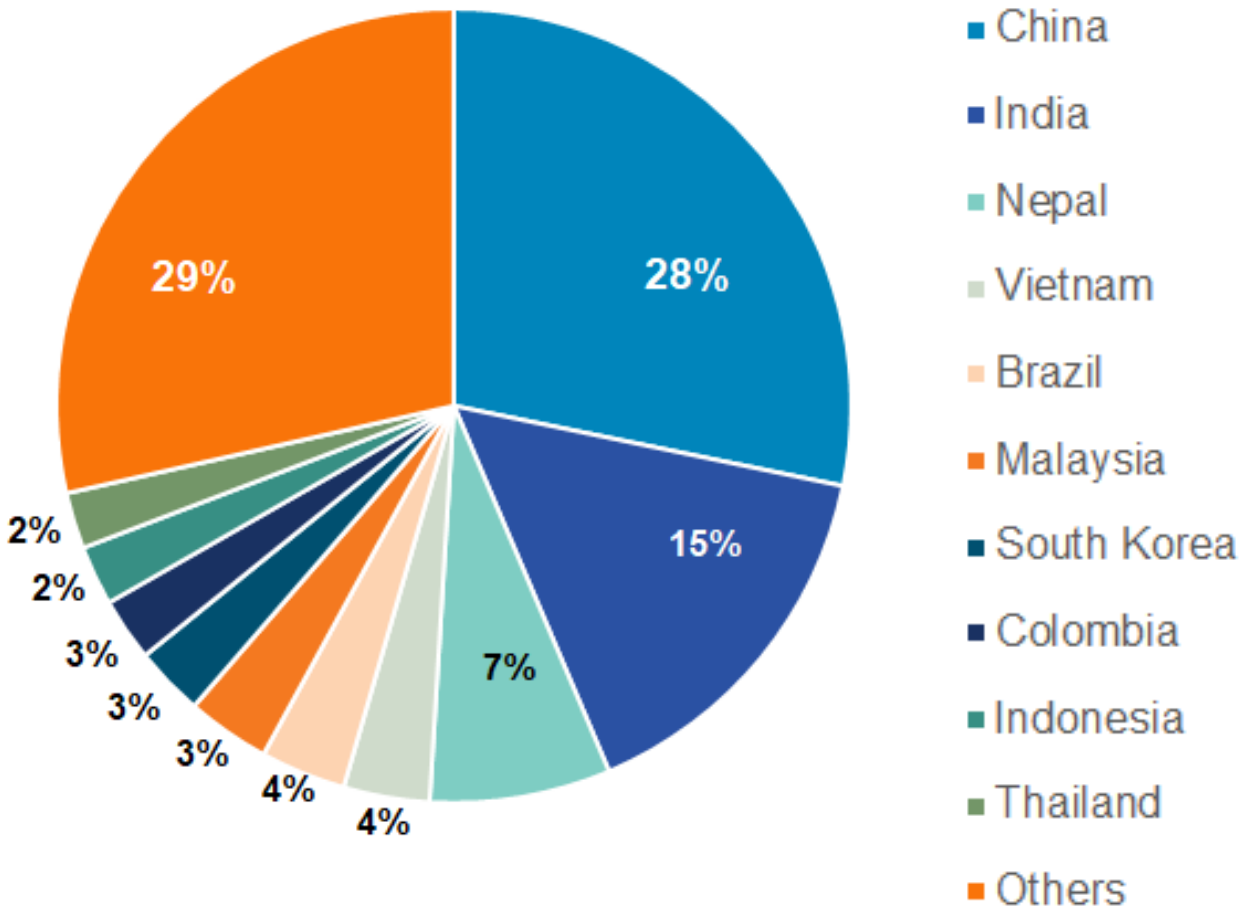
Students: 2018



	2017	2018	% change
China	184,286	204,999	11%
India	68,110	89,251	31%
Nepal	28,484	42,917	51%
Brazil	24,233	26,611	10%
Malaysia	25,926	26,020	0%
Vietnam	23,639	24,107	2%
South Korea	22,333	21,769	-3%
Thailand	19,460	18,004	-7%
Colombia	14,104	16,928	20%
Indonesia	15,635	16,538	6%
Others	196,699	205,567	5%
<b>World</b>	<b>622,909</b>	<b>692,711</b>	<b>11%</b>

# How many international students in Australia?

Students: January - July 2019



	January -July 2018	January -July 2019	% change
China	187,161	193,358	3%
India	79,549	105,306	32%
Nepal	37,760	50,412	34%
Vietnam	22,505	23,986	7%
Brazil	23,119	23,809	3%
Malaysia	24,741	23,227	-6%
South Korea	19,861	19,364	-3%
Colombia	14,310	17,601	23%
Indonesia	15,147	16,600	10%
Thailand	16,669	15,679	-6%
Others	184,541	195,412	6%
<b>World</b>	<b>625,363</b>	<b>684,754</b>	<b>9%</b>

Source: Department of Education

# Looking forward with data

Australian data sources include:

- Students – a cumulative count of human beings
- Enrolments – a cumulative count of **all** course enrolments
- Commencements – a cumulative count of **new** course enrolments
- Growth rates for January - July 2019 (compared to January - July 2018):

## Students



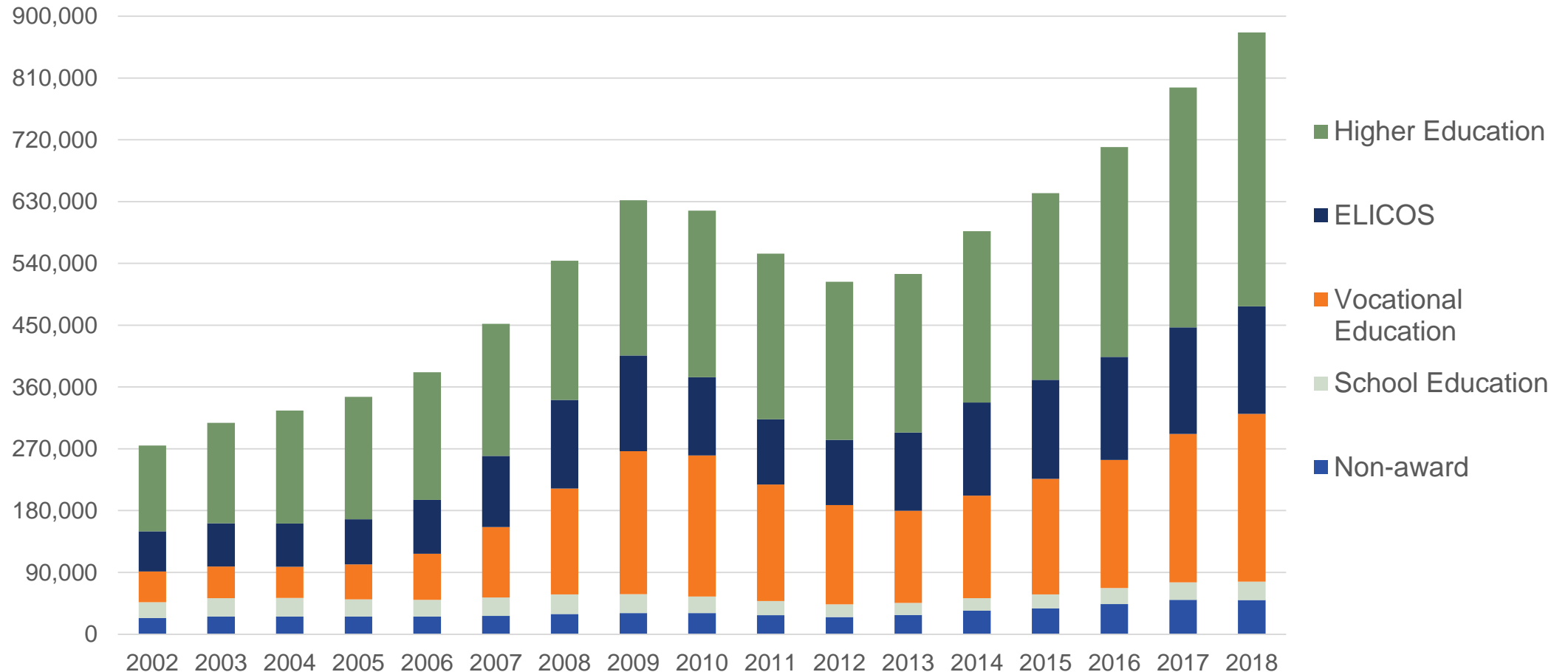
## Enrolments



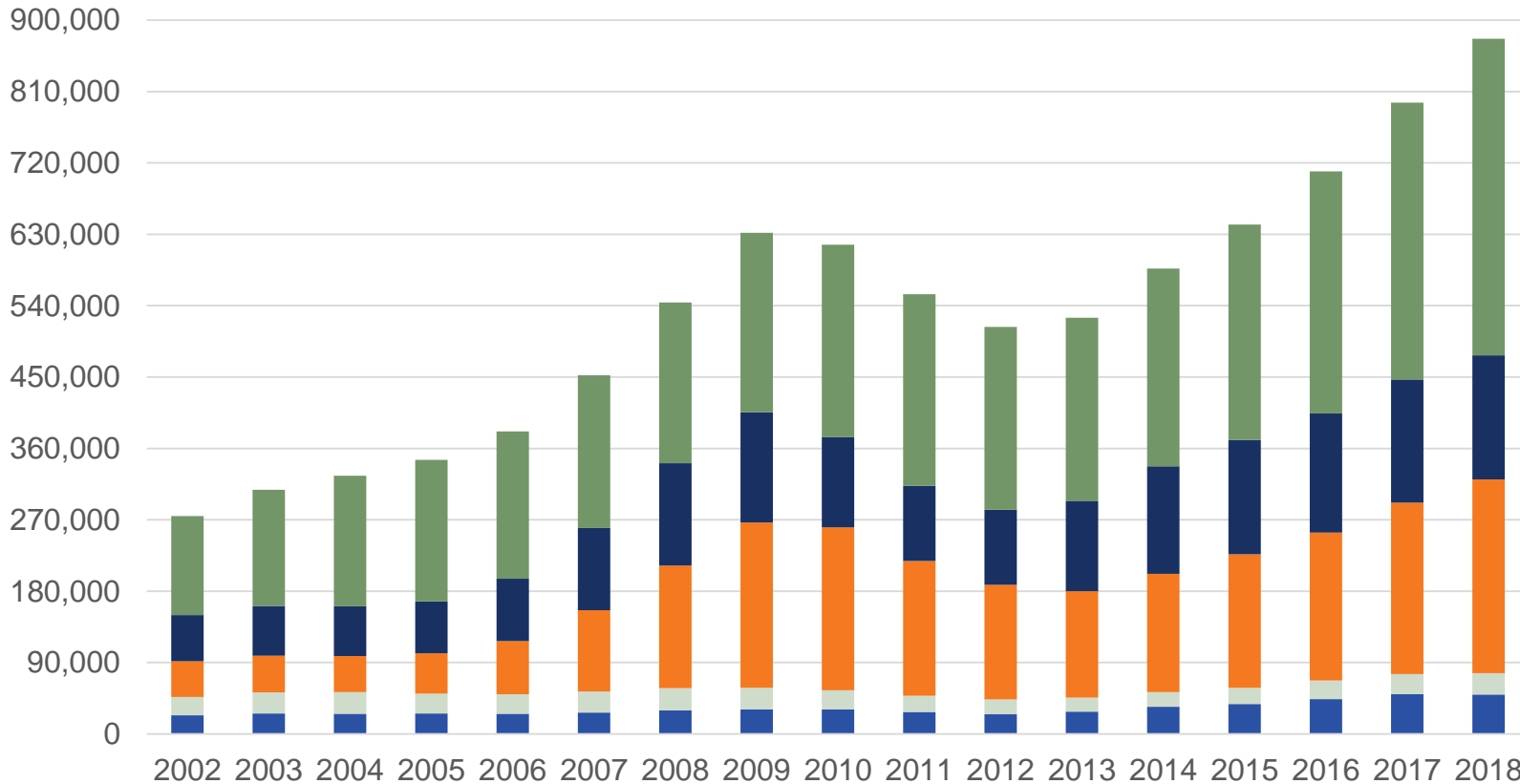
## Commencements



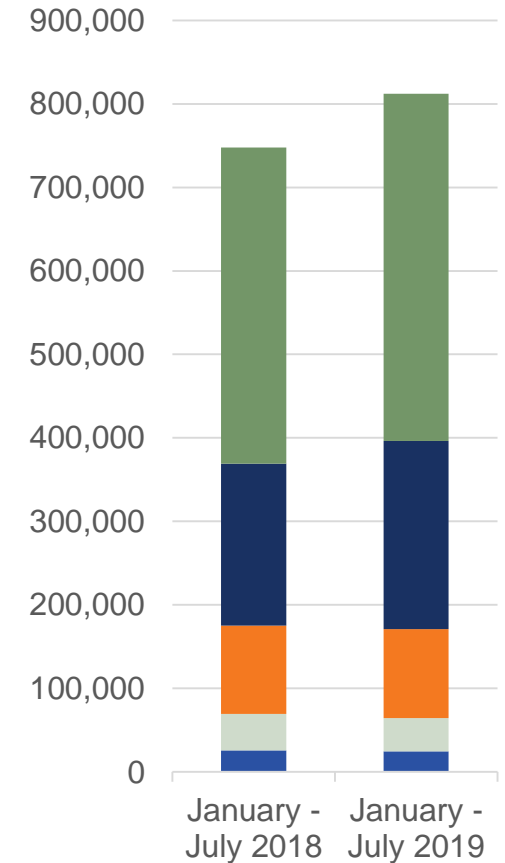
# International Student Enrolments in Australia by Education Sector – full year to 2018



# International Student Enrolments in Australia by Education Sector – year-to-date July



- Higher Education
- ELICOS
- Vocational Education
- School Education
- Non-award



# Where do students study in Australia?

<b>Distribution of international student enrolments in Australian capital and regional areas in 2018</b>					
<b>State / Territory</b>	<i>Share</i>		<i>Enrolments</i>		<b>Total</b>
	<b>*Major Cities</b>	<b>Regional area</b>	<b>*Major Cities</b>	<b>Regional area</b>	
NSW	99%	1%	330,224	3,689	333,913
VIC	99%	1%	276,733	2,242	278,975
QLD	95%	5%	127,260	7,052	134,312
WA	100%	0%	51,597	233	51,830
SA	100%	0%	37,870	95	37,965
ACT	100%	0%	19,286		19,286
TAS		100%		10,796	10,796
NT		100%		2,632	2,632
<b>Australia</b>	<b>97%</b>	<b>3%</b>	<b>842,970</b>	<b>26,739</b>	<b>869,709</b>

*\*Major Cities of Australia include capital and other large cities in each state and territory, with the exception of Tasmania (TAS) and Darwin (NT). Major cities also include non-capital cities such as the Gold Coast and Newcastle.*

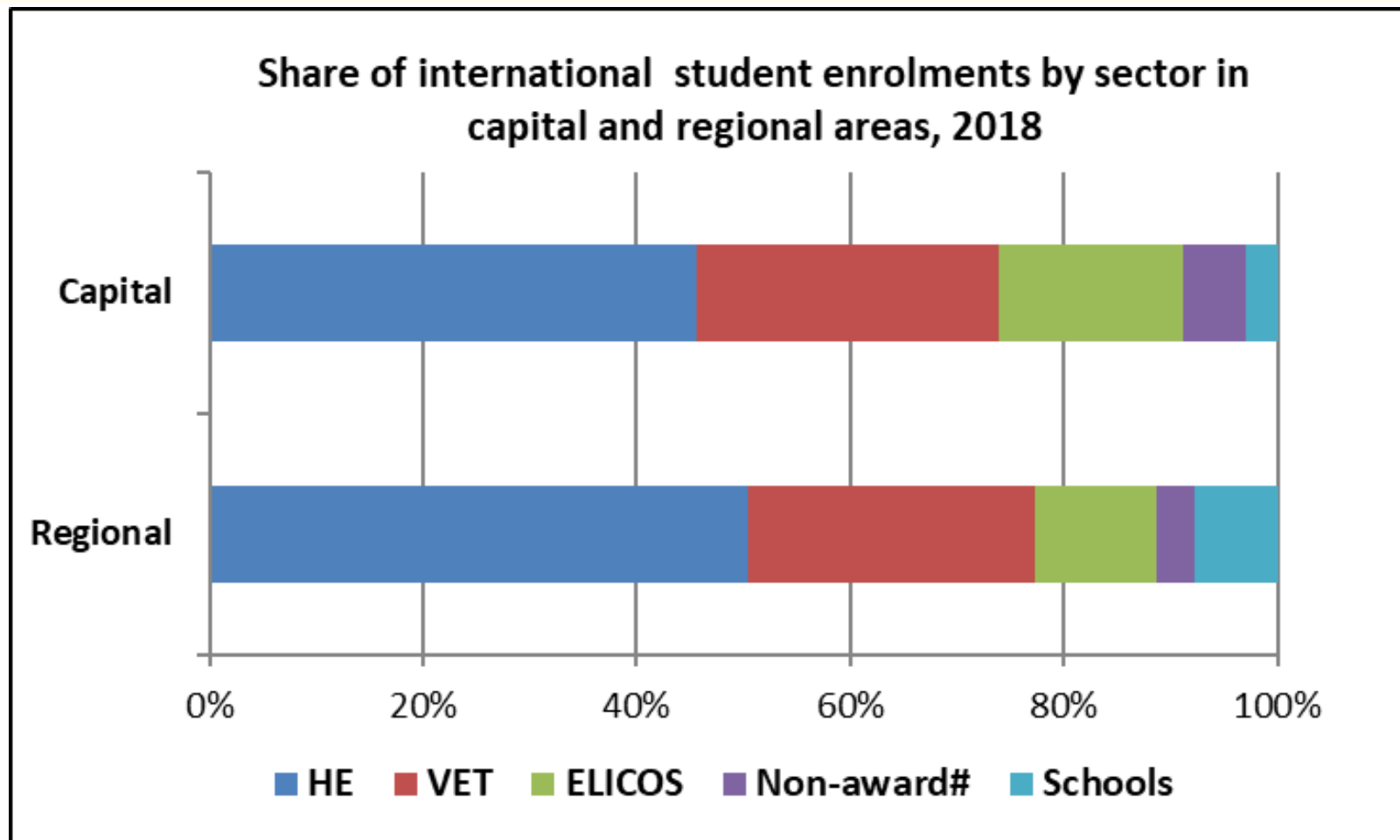


# Where do students study in Australia?

Top ten regional centres for international student enrolments in 2018					
State / Territory	**Regional centres	2017	2018	Share	Growth on 2017
TAS	Hobart	6,862	9,391	35%	37%
NT	Darwin	2,462	2,625	10%	7%
QLD	Cairns	2,675	2,475	9%	-7%
QLD	Toowoomba	2,064	2,038	8%	-1%
QLD	Townsville	1,942	1,860	7%	-4%
NSW	Richmond - Tweed	1,442	1,554	6%	8%
NSW	New England and North West	1,350	1,427	5%	6%
TAS	Launceston and North East	1,381	1,389	5%	1%
VIC	Ballarat	1,001	1,199	4%	20%
VIC	Geelong	418	323	1%	-23%
<i>Other locations</i>		2,612	2,458	9%	-6%
<b>Total enrolments in regional areas</b>		<b>24,209</b>	<b>26,739</b>	<b>100%</b>	<b>10%</b>

*\*\*SA4 regions as derived from the ABS Australian Statistical Geography Standard.*

# Where do students study in Australia?



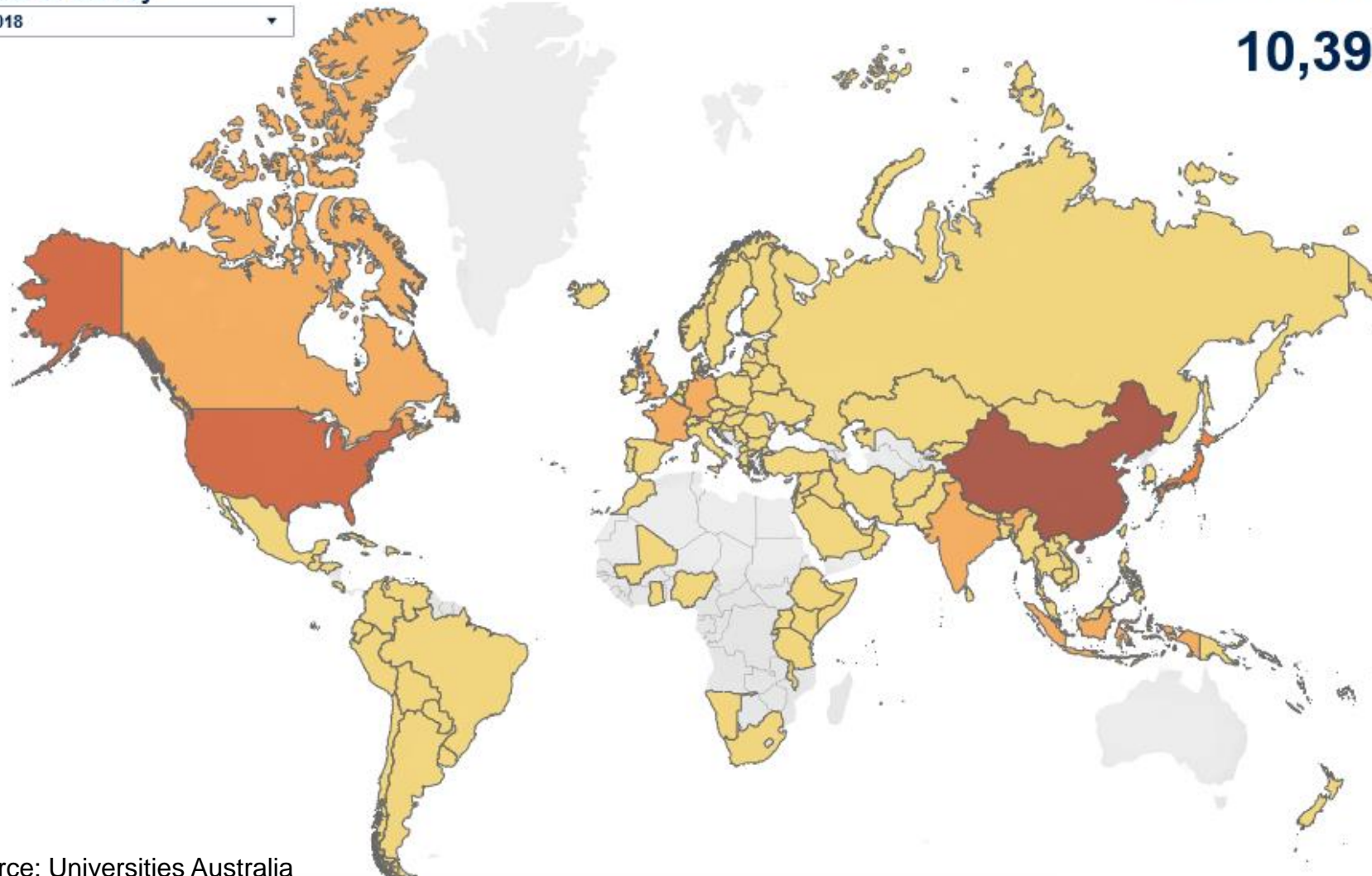
# Including foundation and study abroad courses.

# International Linkages

## Distribution of formal agreements in 2018

Year of Survey

2018



Total number of agreements in 2018:

**10,392**

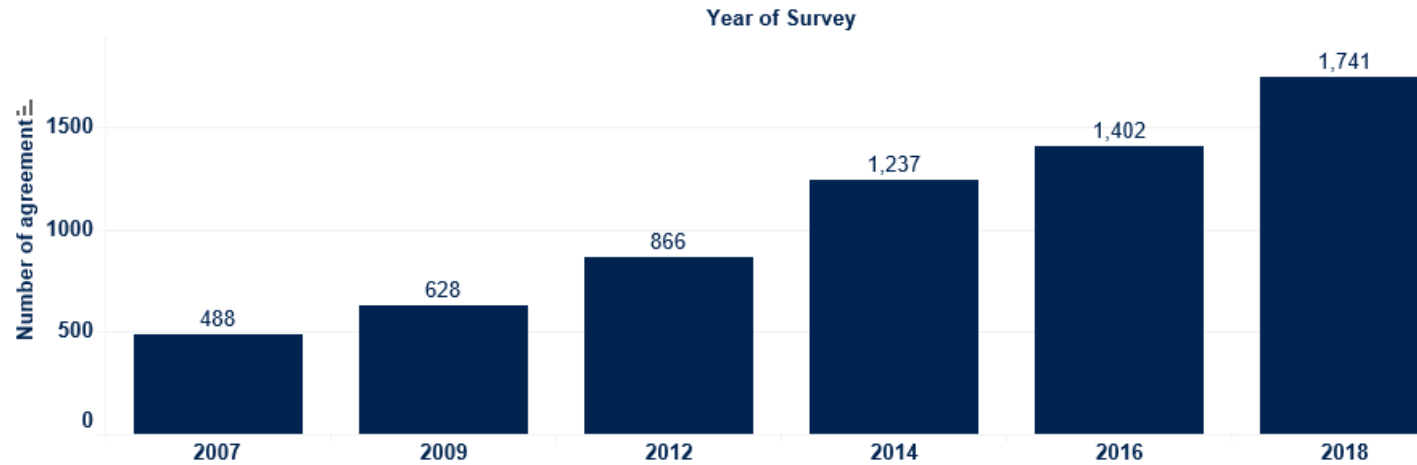
Universities Australia – International Linkages Survey.

In 2018, the top 3 countries with most agreements with Australian universities were:

- China: 1,741
- USA: 1,110
- Germany: 601.

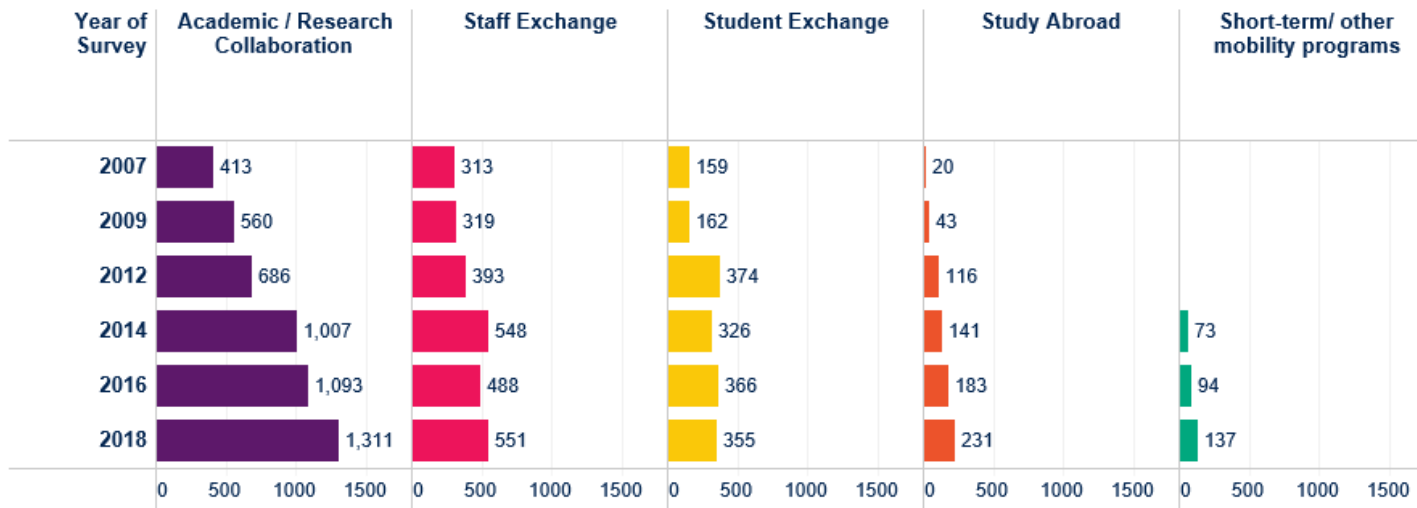
# International Linkages

## Number of agreements with China (People's Republic of)

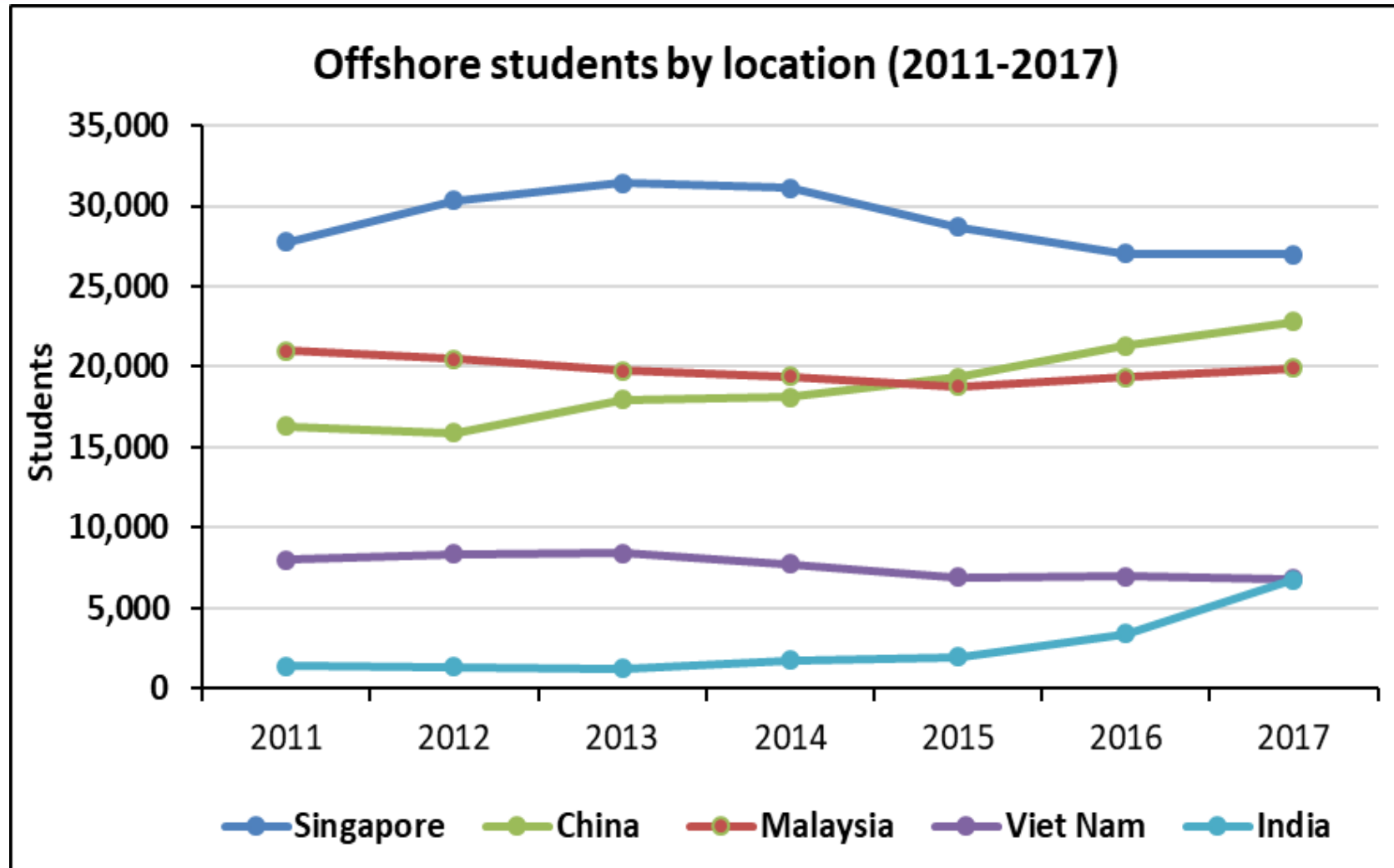


The majority of agreements between most countries are for research collaboration, but agreements on staff and student mobility are also common.

## Types of agreement with China (People's Republic of)



# Where is higher education delivered offshore?



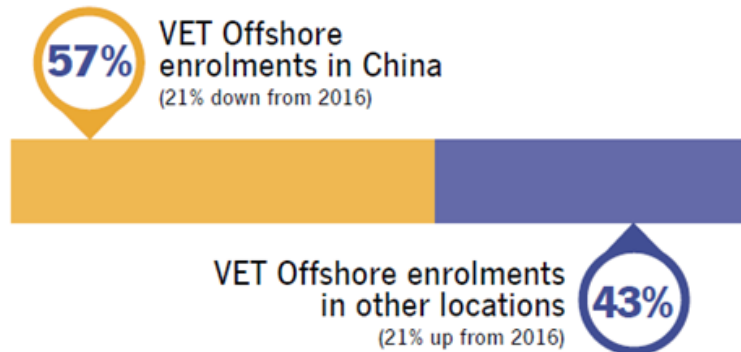
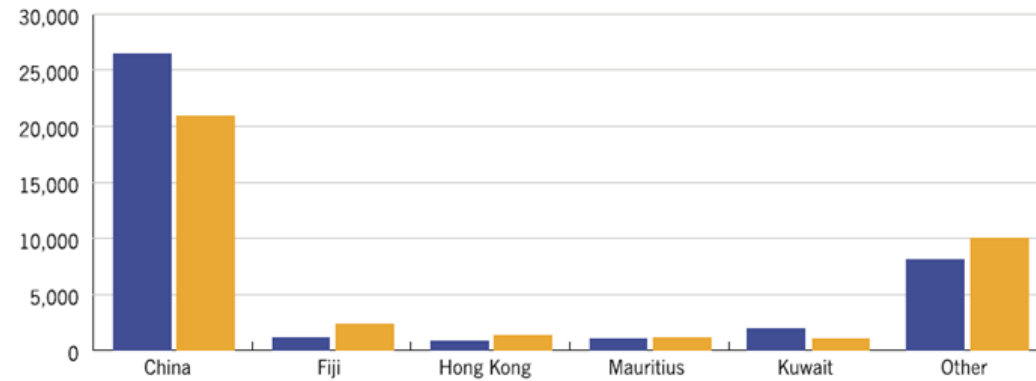
Research snapshot: Offshore delivery of Australian higher education courses,  
Australian Government Department of Education, October 2018

# Where is VET delivered offshore?



**OFFSHORE VET ENROLMENTS IN 2017**  
**36,765**  
FROM 45 OFFSHORE LOCATIONS

## TOP 5 LOCATIONS FOR VET DELIVERY OFFSHORE



Research snapshot: Offshore delivery of Australian VET courses in 2017, Australian Government Department of Education, October 2018

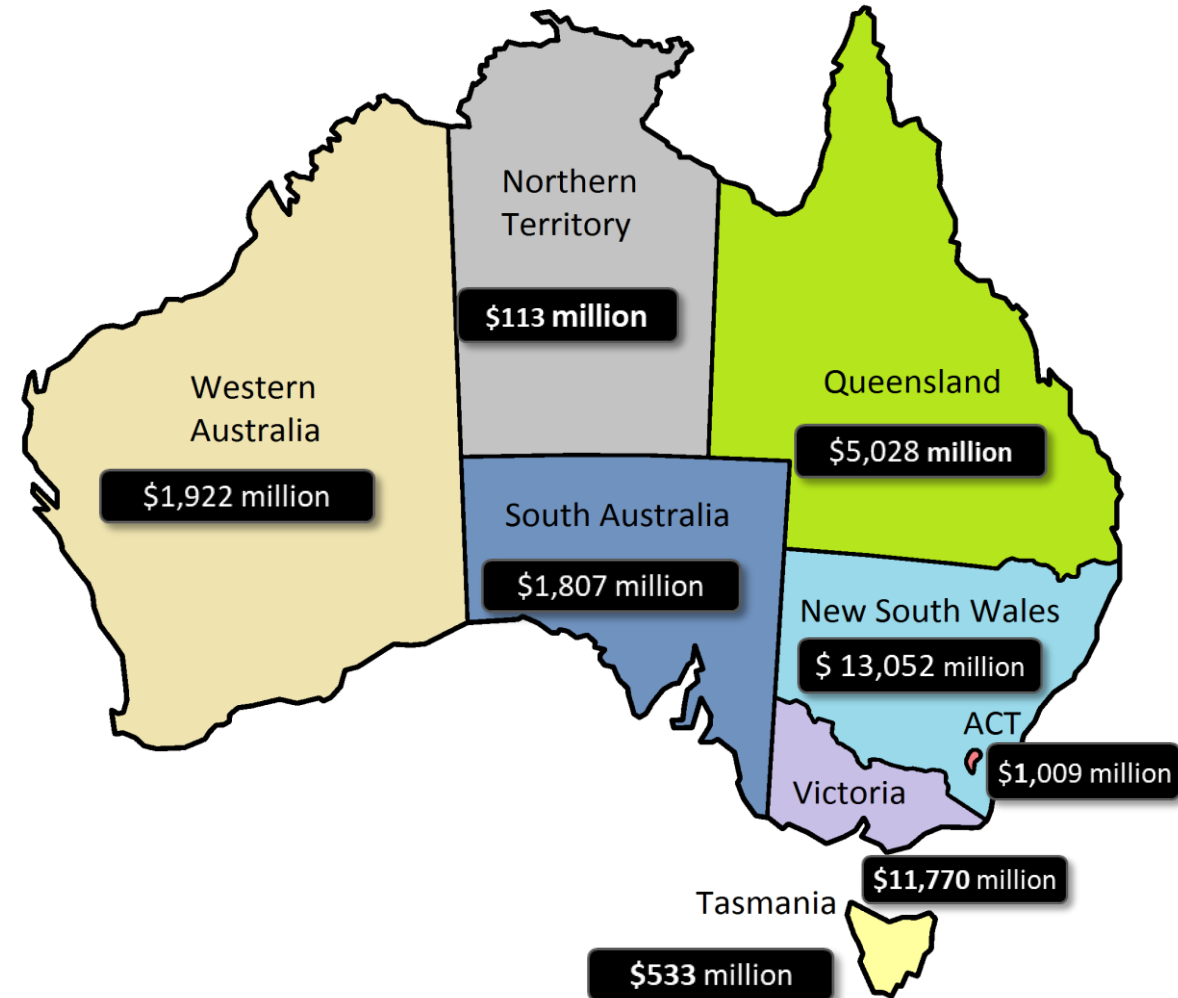


# Export income from international education, by sector and state/territory, 2018

## Export income, education, \$million

Education sector	2018	% change from 2017
Higher education	24,337	18%
VET	6,347	21%
ELICOS	1,585	1%
Schools	1,445	11%
Non-award	1,052	1%
Other students*	467	11%
<b>Grand total</b>	<b>\$35,234m</b>	<b>16%</b>

\*Other students incorporates New Zealanders and students supported by DFAT or Defence





# Austrade's data landing page

**aiec**  
2019 P e r t h



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## Education data

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### International education and training data

This page provides an overview of Austrade data tools and a directory of government data sets related to the international education and training sector.

[Twitter](#) [Instagram](#) [#aiec2019](#)



International student enrolment data



Student visa data



Education exports



Australia Awards

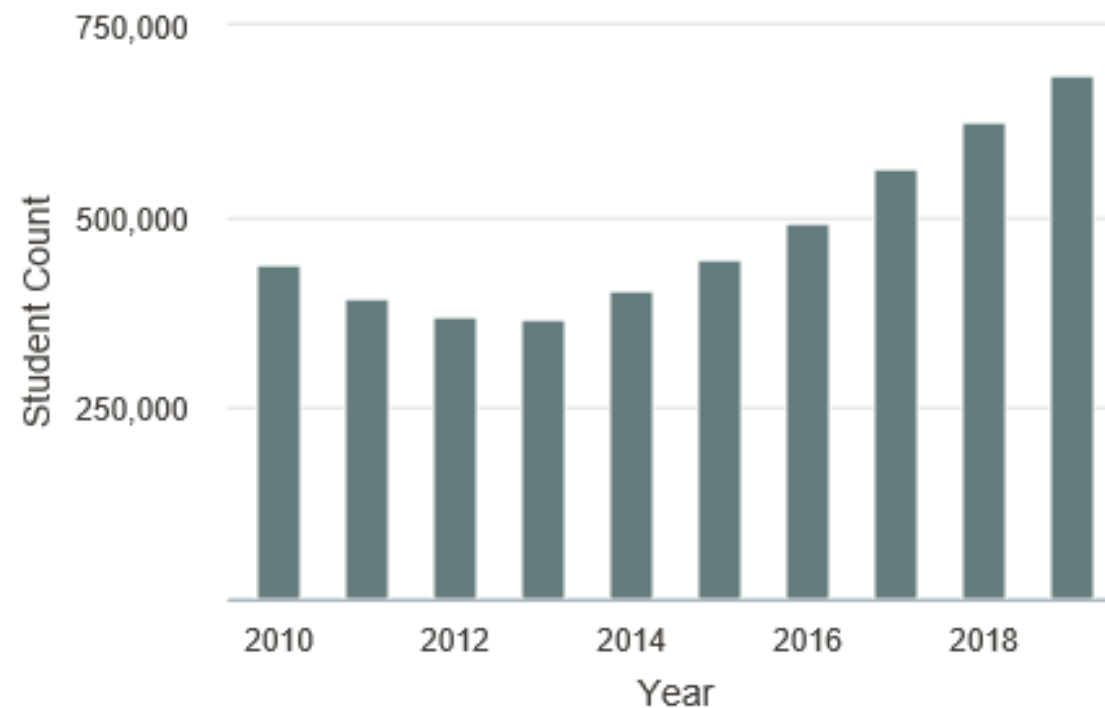


Data and research



Competitor data

International students in Australia



# Austrade's data landing page



International student enrolment data



Student visa data



Education exports



Australia Awards




Data and research




Competitor data



 International student enrolment data

 Student visa data

 Education exports

 Australia Awards

 Data and research


 Competitor data

Exports (\$ millions)		
Country	2018	Change on 2017
China	11,711	16.9%
India	4,573	33.3%
Nepal	2,137	63.9%
Malaysia	1,405	5.3%
Viet Nam	1,343	7.1%
South Korea	984	1.9%
Brazil	972	25.1%
Indonesia	899	7.9%
Thailand	782	-4.5%
Hong Kong	780	-0.6%

 International student enrolment data

 Student visa data


 Education exports

 Australia Awards

 Data and research

 Competitor data




 International student enrolment data

 Student visa data

 Education exports

 Australia Awards

 Data and research

 Competitor data

9 Oct 2019

Department of Home Affairs releases  
August 2019 student visa data

20 Sep 2019

Inclusion of onshore visa decisions in  
providers' Evidence Levels

26 Aug 2019

June international student data now  
available





International student enrolment data



Student visa data



Education exports



Australia Awards



Data and research



Competitor data

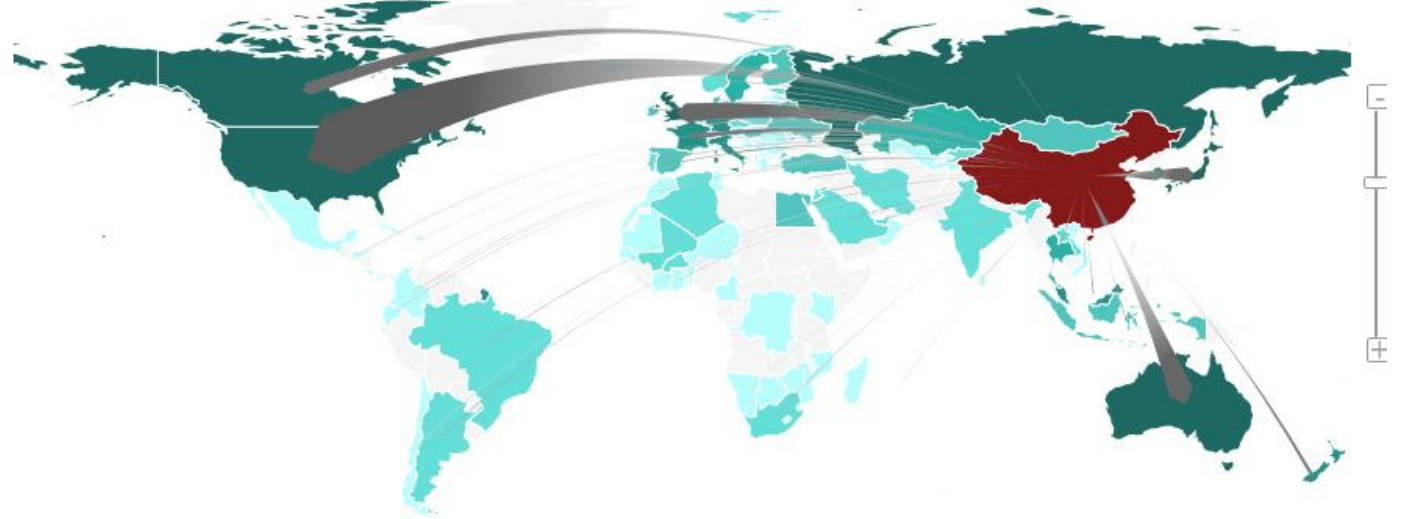
To explore the data select a country from the menu, or click on the map.

China

- Where do students come from?
- Where do students go?

Arrows resized:

10



Internationally mobile students:  
0 100 1,000 5,000 10,000 50,000



## International education data

Austrade provides market intelligence, data and analysis, along with interactive data through MIP orbis, to empower Australia's international education and training sector.

## MIP Orbis interactive data



MIP Orbis, a tool for MIP subscribers that provides easy access to international education data through interactive visualisations. Users can also explore source data to create their own charts and discover trends.

### Market dashboards

Interactive dashboards with monthly student enrolment, visa and exports data, plus an overview of in-market opportunities.

MIP SUBSCRIBER CONTENT

Launch MIP Orbis >

### Regional dashboards

Interactive dashboards with monthly student enrolment data by state or territory, ABS remoteness area and Statistical Area level 4.

MIP SUBSCRIBER CONTENT

Launch dashboard >

### Where to compete?

Austrade's view of broad-based opportunity by sector and market, and likelihood of success via global economic indicators.

MIP SUBSCRIBER CONTENT

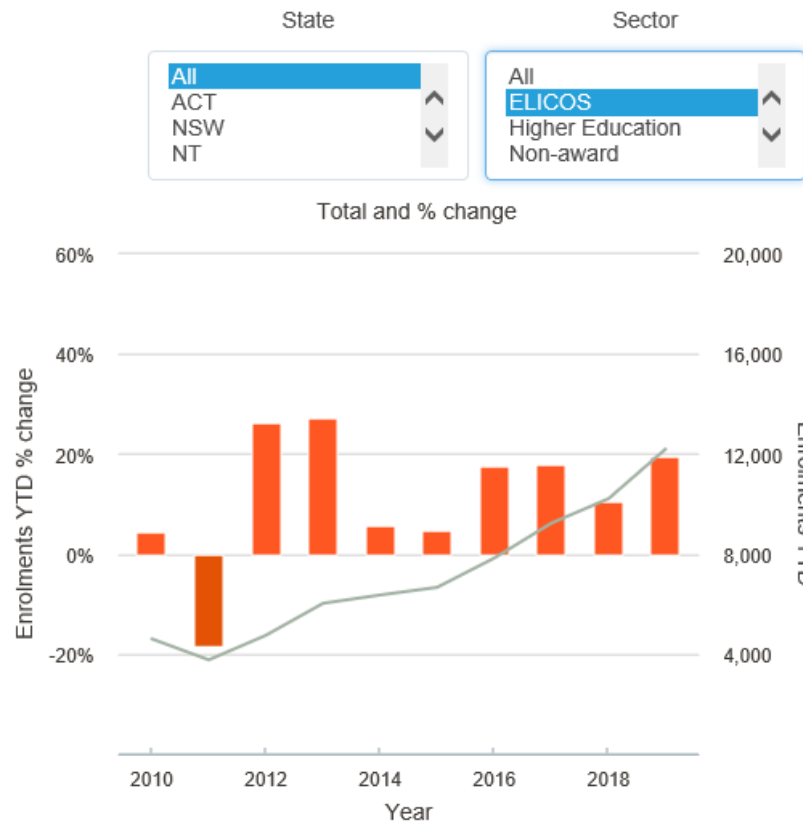
Launch tool >

## STUDENT DATA

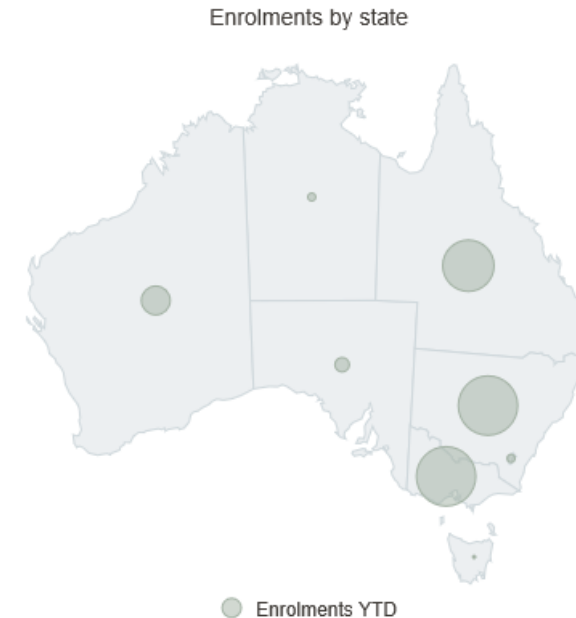
## MARKET INFO

## OPPORTUNITY OVERVIEW

## ECONOMIC INDICATORS



## COLUMBIA



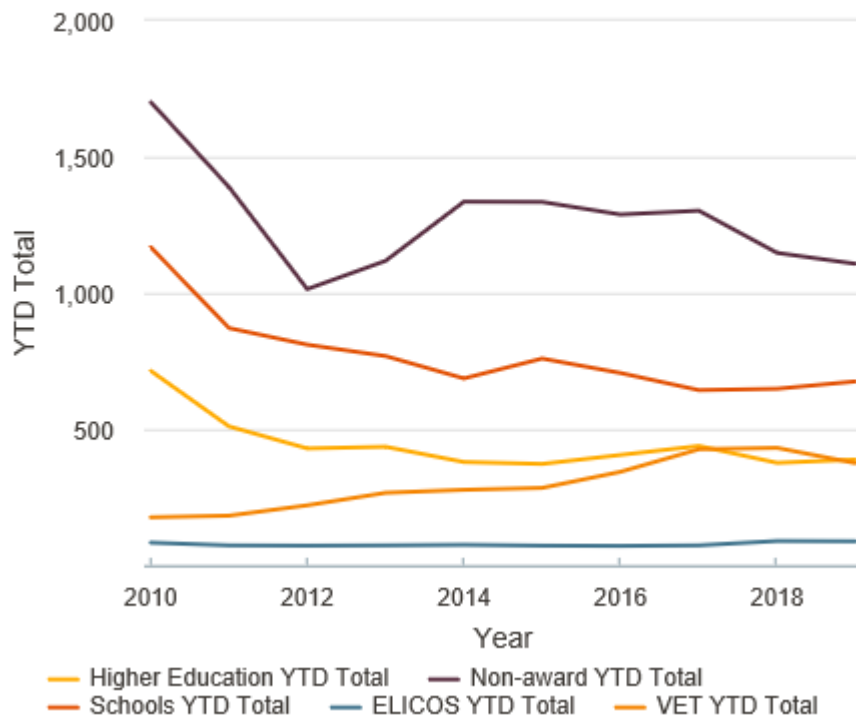
STUDENT DATA

MARKET INFO

OPPORTUNITY OVERVIEW

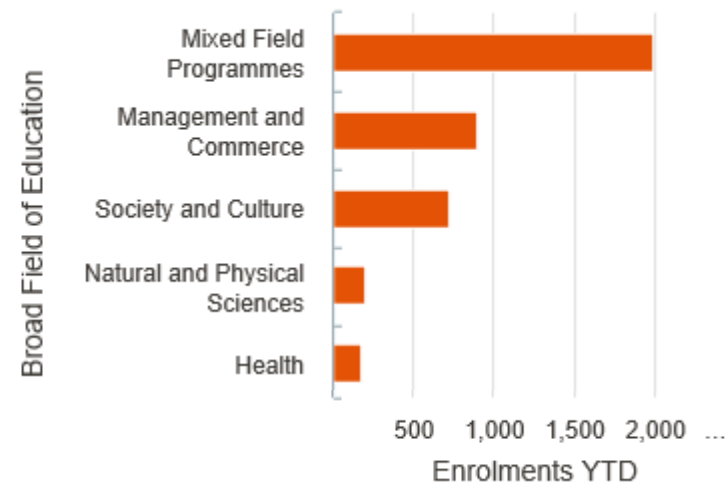
ECONOMIC INDICATORS

Visa grants - Calendar year to date



## GERMANY

Top fields of education 2019



STUDENT  
DATA

MARKET  
INFO

OPPORTUNITY  
OVERVIEW

ECONOMIC  
INDICATORS

Onshore

**JAPAN**

### **Study Tours**

Australia is the most popular destination for high school study tours, with 30,000 students visiting Australia annually. Australia has a strong reputation in Japan for being a safe destination and for schools to flexibly customise programs to suit the needs of Japanese schools.

In-market and online

### **Research Collaboration**

Australian and Japanese universities have over 480 partnerships and a long history of engagement. The Japan Society for the Promotion of Science outlines the Japanese Government's research priorities and available funding.

# Where to compete?

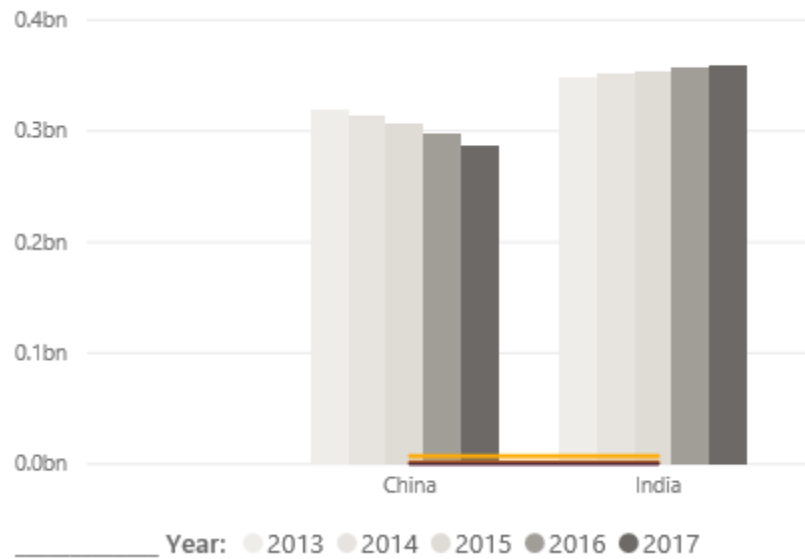
## CHINA vs INDIA

OPPORTUNITY  
OVERVIEW

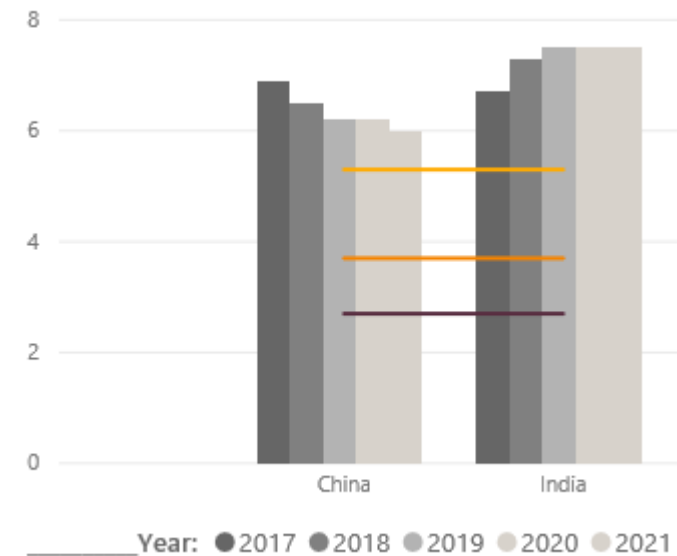
ECONOMIC  
INDICATORS

- Age Group
- Select all
  - 00-04
  - 05-09
  - 10-14
  - 15-19
  - 20-24
  - 25-29
  - 30-34
  - 35-39
  - 40-44
  - 45-49
  - 50-54
  - 55-59
  - 60-64
  - 65-69

Population by age group



Forecast annual GDP % growth



# Regional Dashboard

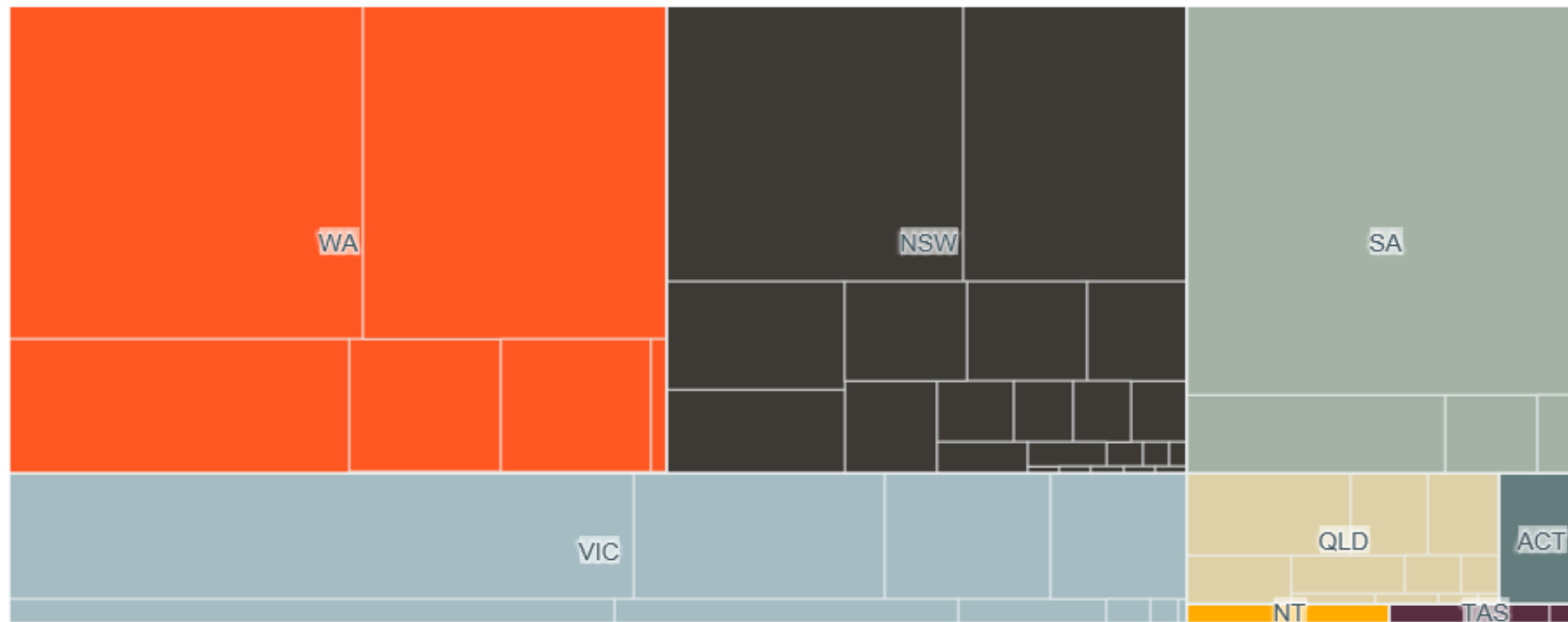
SNAPSHOT

TRENDS

IN DETAIL

Market share by state and SA4 - All (Click a state for more detail by SA4)

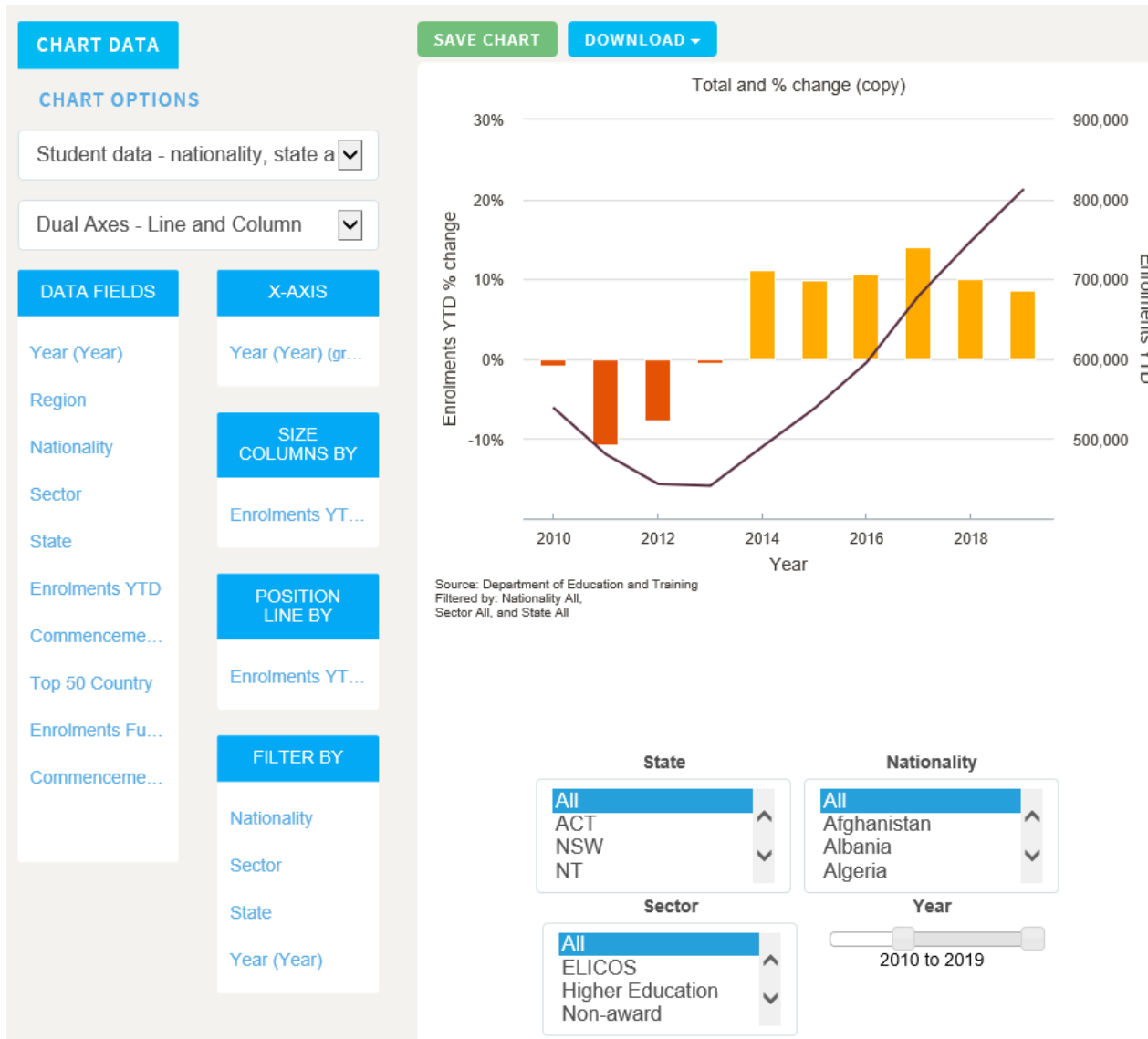
**KENYA**



Source: Department of Education and Training  
Filtered by: Sector All, Nationality  
Kenya, Year 2018, and State All

# Create your own graphs

EXPLORE





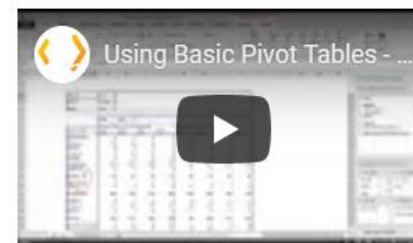
# Explore the data yourself

Month	Jul			
Nationality	(All)			
State	(All)			
	Data	Year		
	YTD Enrolments		Change on 2018	
Sector	2018	2019	2018	2019
Higher Education	378,686	415,703		9.78%
VET	193,747	225,188		16.23%
Schools	25,657	24,754		-3.52%
ELICOS	105,838	106,811		0.92%
Non-award	43,873	39,648		-9.63%
Grand Total	747,801	812,104		8.60%

## Basic/ Standard/ Detailed

- State & Territory
- Sector
- Nationality
- Month & Year
- Level of Study
- Region
- Provider Type
- Broad/ Narrow/ Detailed Field of Education

## Understanding the data



## Latest News

- > Austrade update
- > Competitor activity \*
- > Data
- > Government/partner updates
- > Market insights \*
- > Opportunities \*
- > Reports \*



## Reports

China Skills Heat Map

Report released on US philanthropic sources of research funding

Knowing our competitors – Austrade transnational education report released



# What to know more about the MIP?



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organisation  
subscribers



**3600+**  
individual  
members



**8000+**  
*MIP Weekly*  
recipients



**100+**  
business  
opportunities

Contact [MIP@Austrade.gov.au](mailto:MIP@Austrade.gov.au) to find out more...

## Data



Australian Government  
Department of Education



Australian Government  
Department of Home Affairs

MIP Orbis

## News

THE PIE NEWS



CAMPUS MORNING MAIL  
Hard Facts and Insider Analysis from Stephen Matchett

THE AUSTRALIAN

## Other





Australian International  
Education Conference

15 - 18 October 2019

Perth Convention and  
Exhibition Centre

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# Thank you

Any questions?



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**Thank you**

