



Australian Government
Department of Education and Training

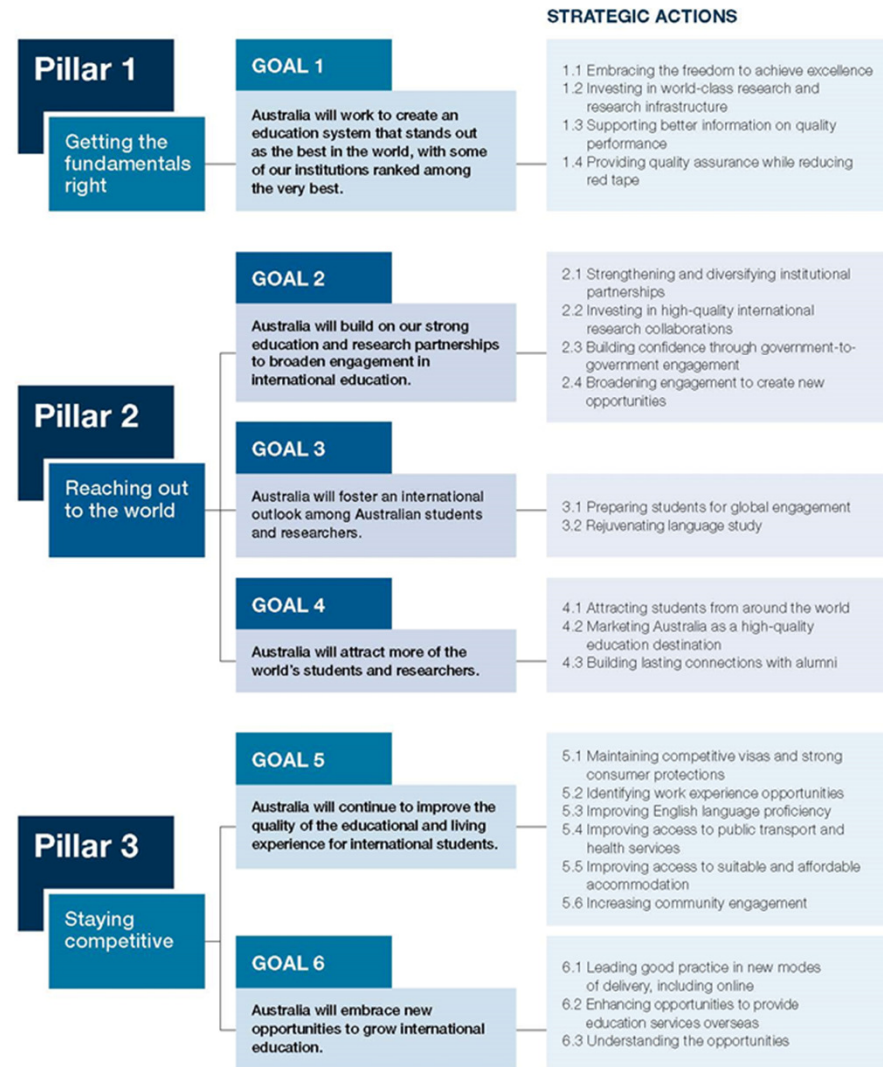
Australian international education: global, responsible and sustainable

Responsible

Australia's international education strategy

Global

Sustainable

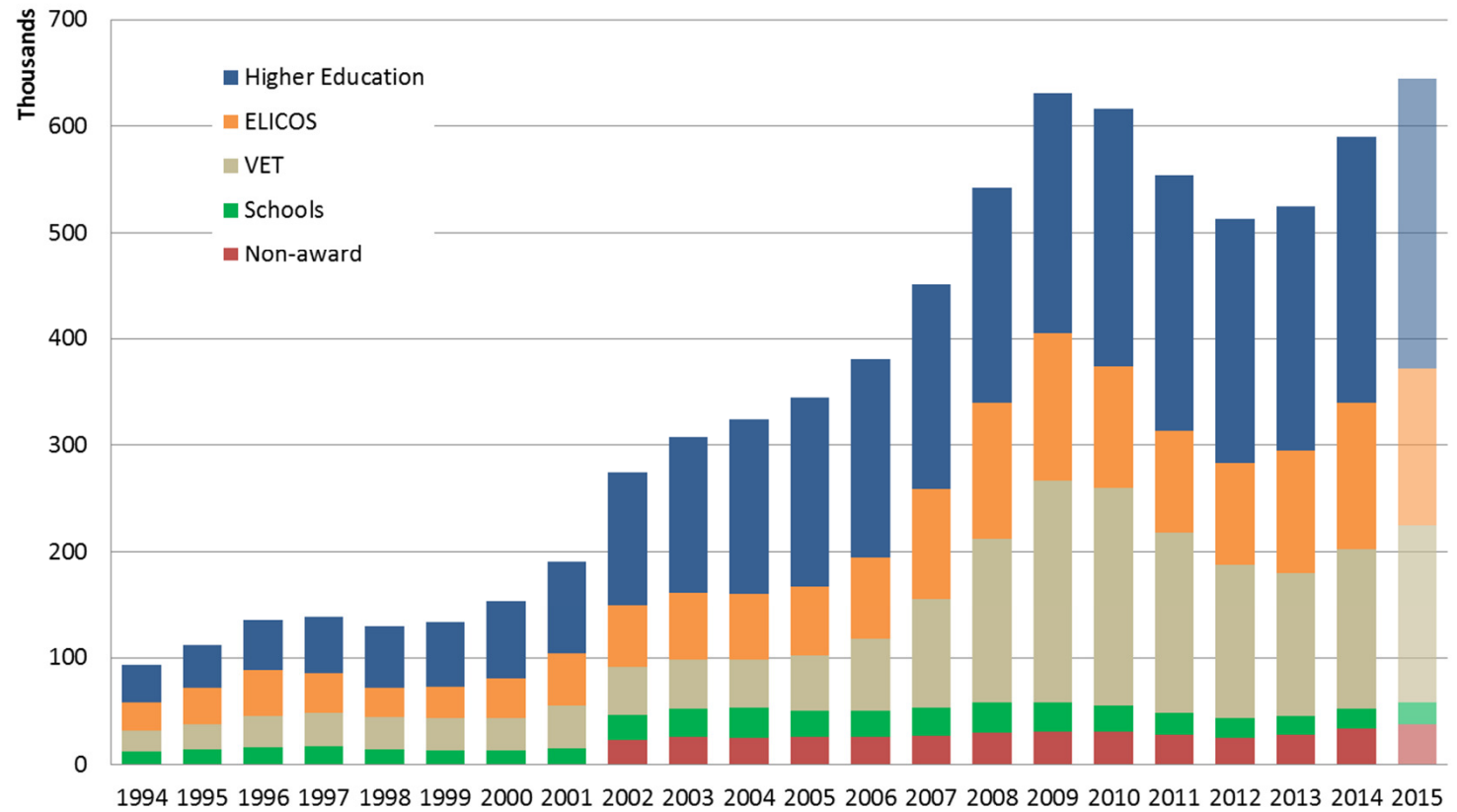


2015 could be a **record** year?

2014 was for **higher education** and **non-award**.



International student enrolments, 1994 to 2015



AIE 2025

A market development plan for Australian International Education.

- Incorporates a target of doubling the number of international students in Australia by 2025.



How to Double a Number: The Rule of 72

- If you want to double a number in 10 years: $72 \div 10 = 7.2$
i.e. you need 7.2% compound annual growth.
- If you want to double a number in 20 years: $72 \div 20 = 3.6$
i.e. you need 3.6% compound annual growth



Note: The rule starts to break down for periods of less than 5 years - then you need a calculator.

Prediction:

8 million international students globally by 2025?

(source uncertain)

UNESCO definition (which excludes any cross-border episodes of less than 1 year duration) captured 4.5 million in 2012.



But then UNESCO also reported there were 250,000 international students in Australia in 2012

How does Australia compare?

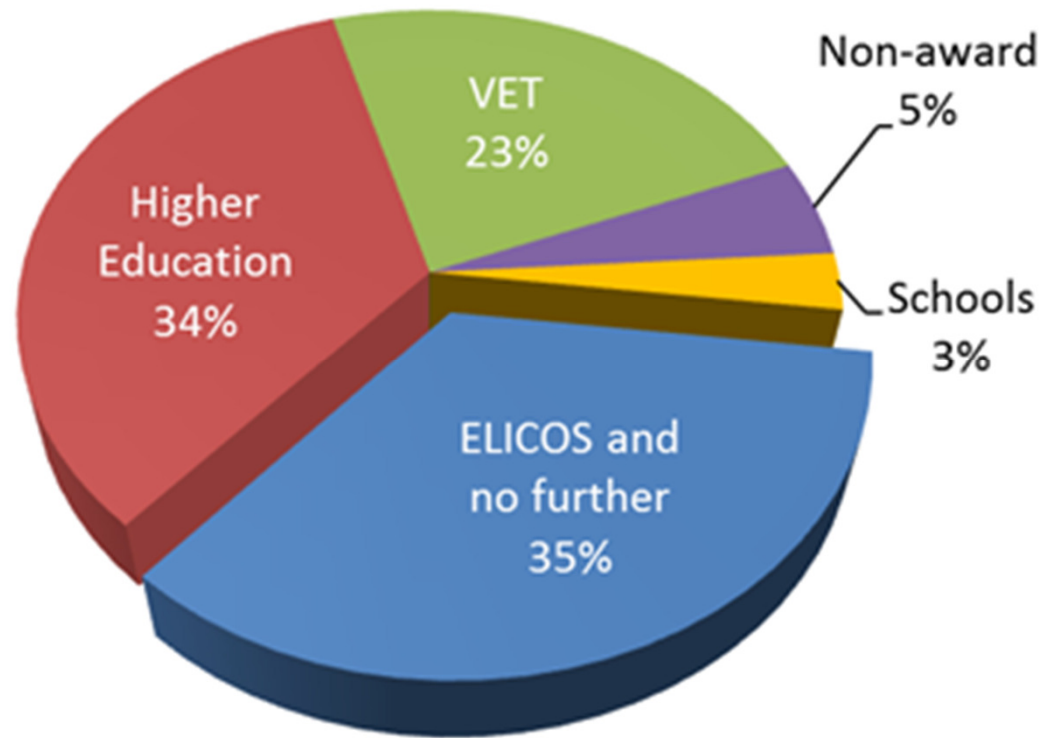
What was the most popular destination for English Language students in 2013?

- a) United Kingdom ✓
- b) United States
- c) Australia

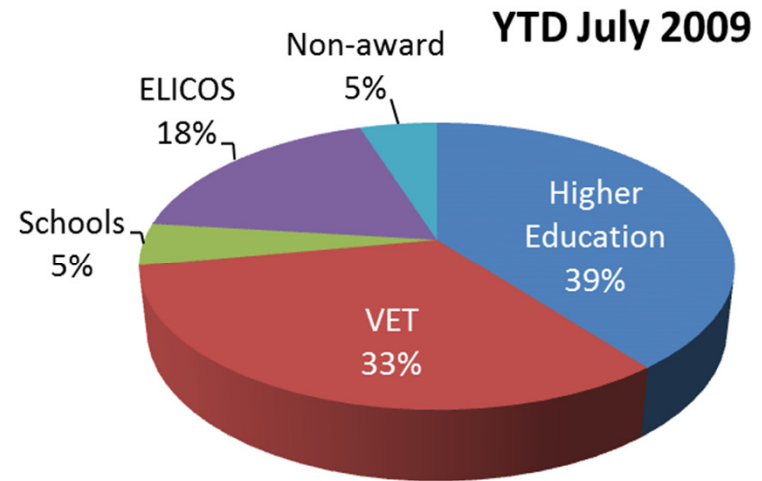
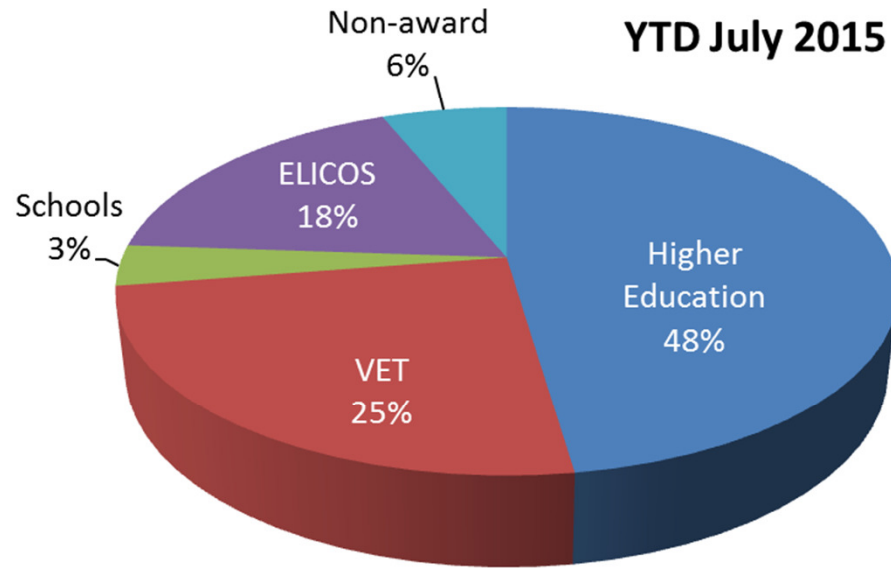


ELICOS as a first step

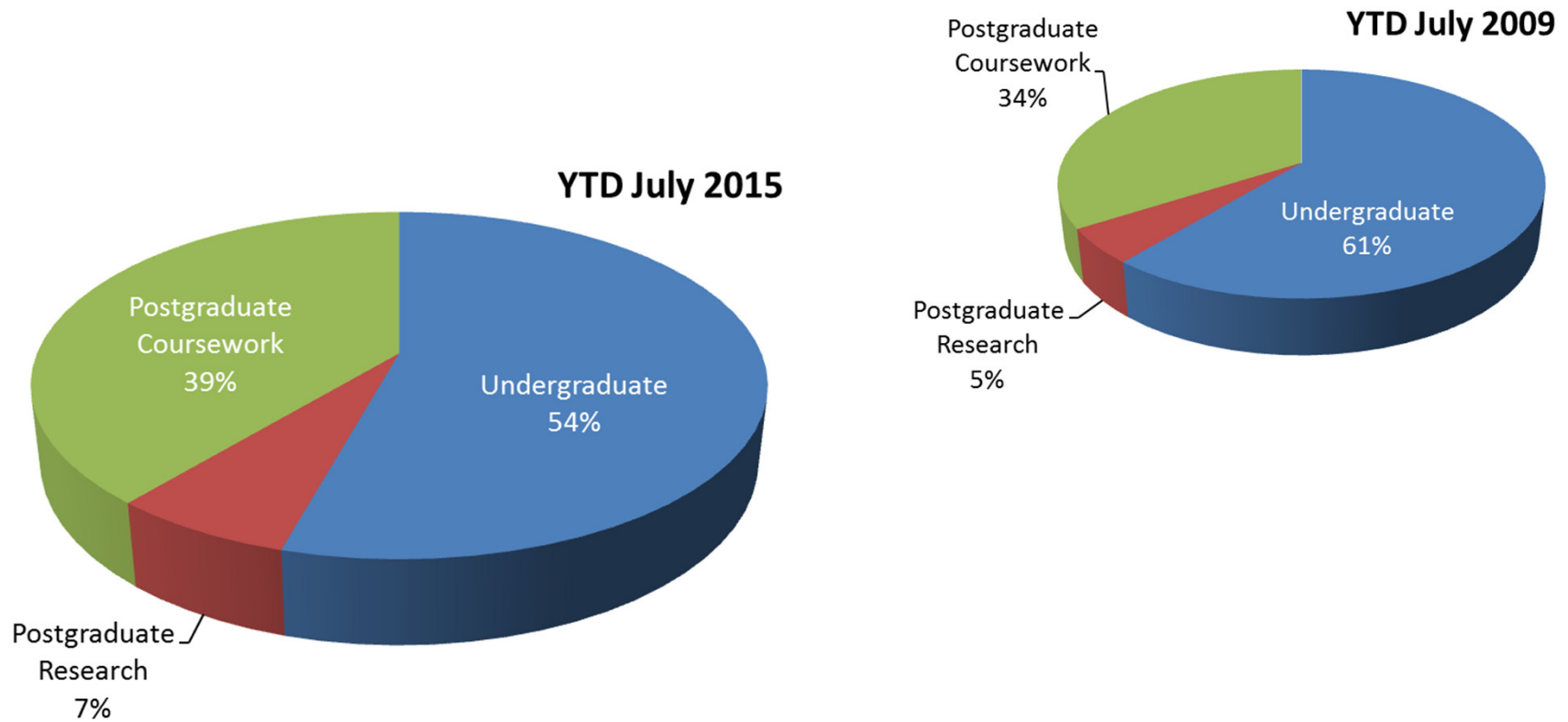
Next enrolment after an ELICOS course, 2014



Enrolments by Sector Year-to-Date (YTD) July



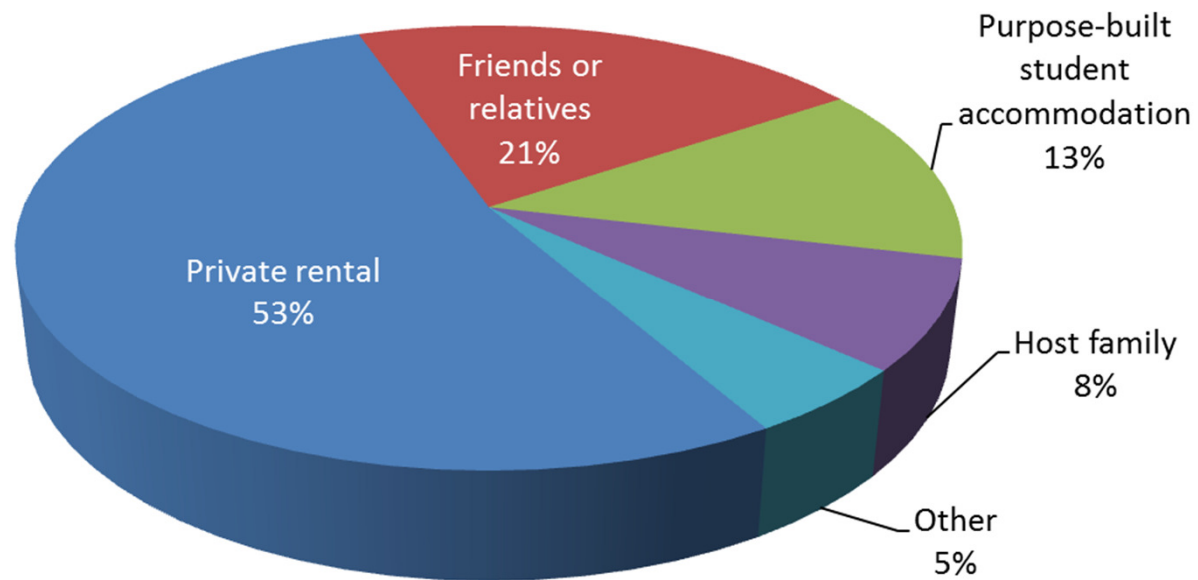
Enrolments in higher education by level of study



Challenges for future growth in Australian international education



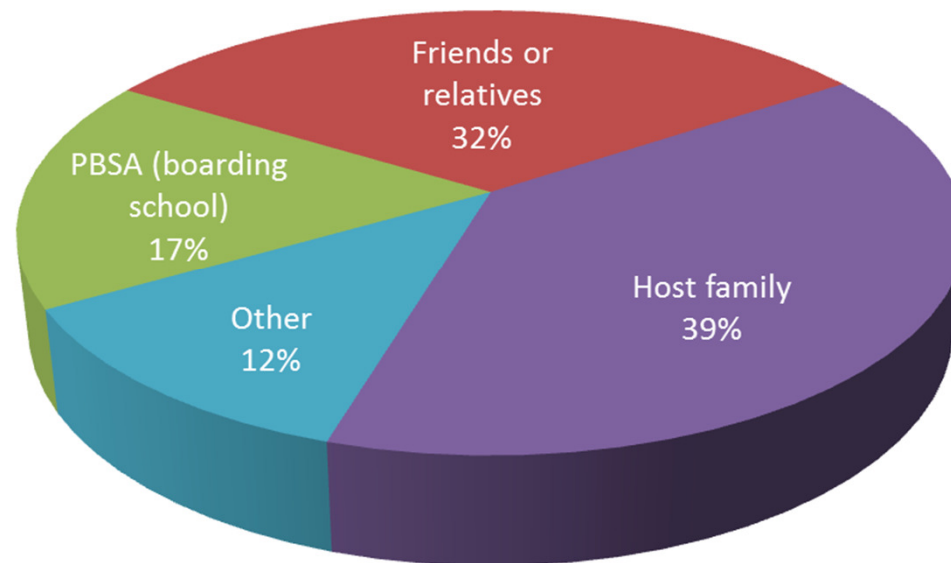
International tertiary student accommodation - 2014



For ELICOS students, 21% stayed with a host family.



International school student accommodation - 2014



How does Australia compare?

JLL reported that the proportion of higher education students living in PBSA in Australian cities was 10%. For greater London, the same figure was:

a) 47%

b) 37%

c) 27%



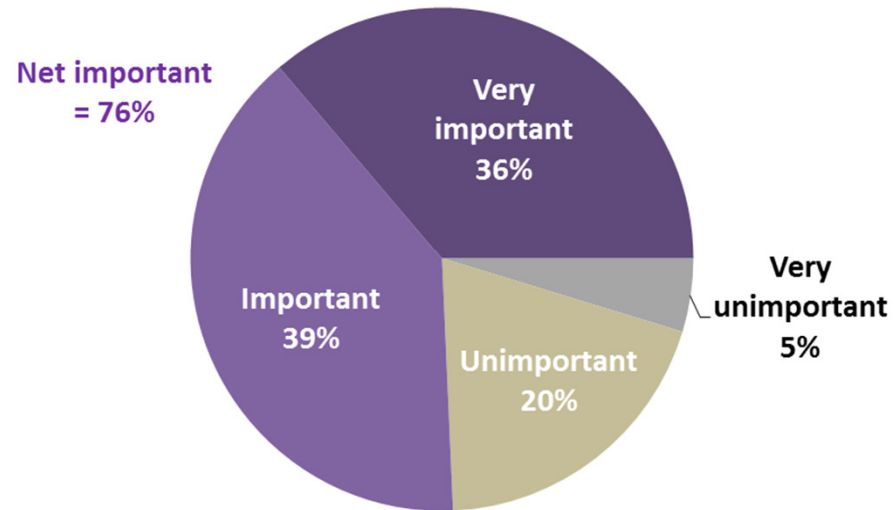
Australia's accommodation future

- Purpose-built student accommodation (PBSA) beds are growing in number by about 5% per annum.
- The number of PBSA beds available to domestic and international students is now 75,000 and is expected to exceed 100,000 by 2020.

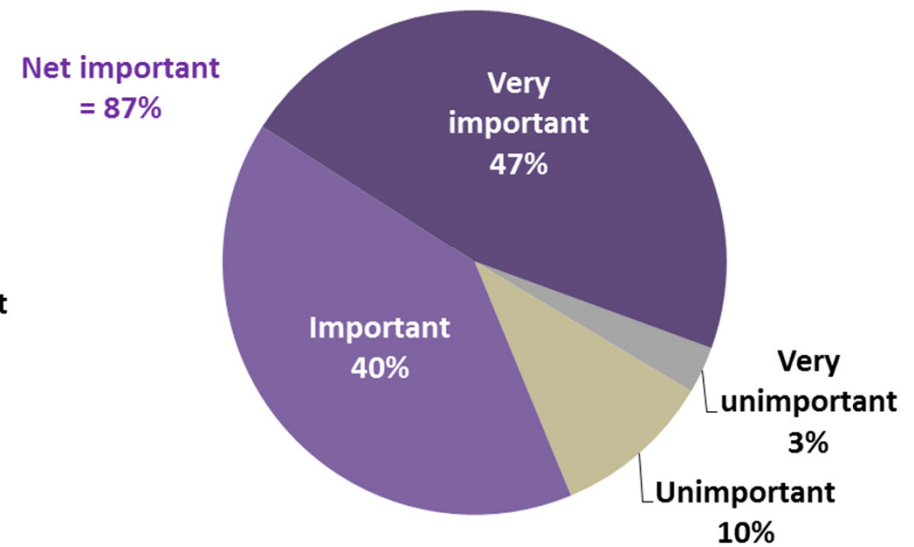


Opportunities to work in Australia while studying

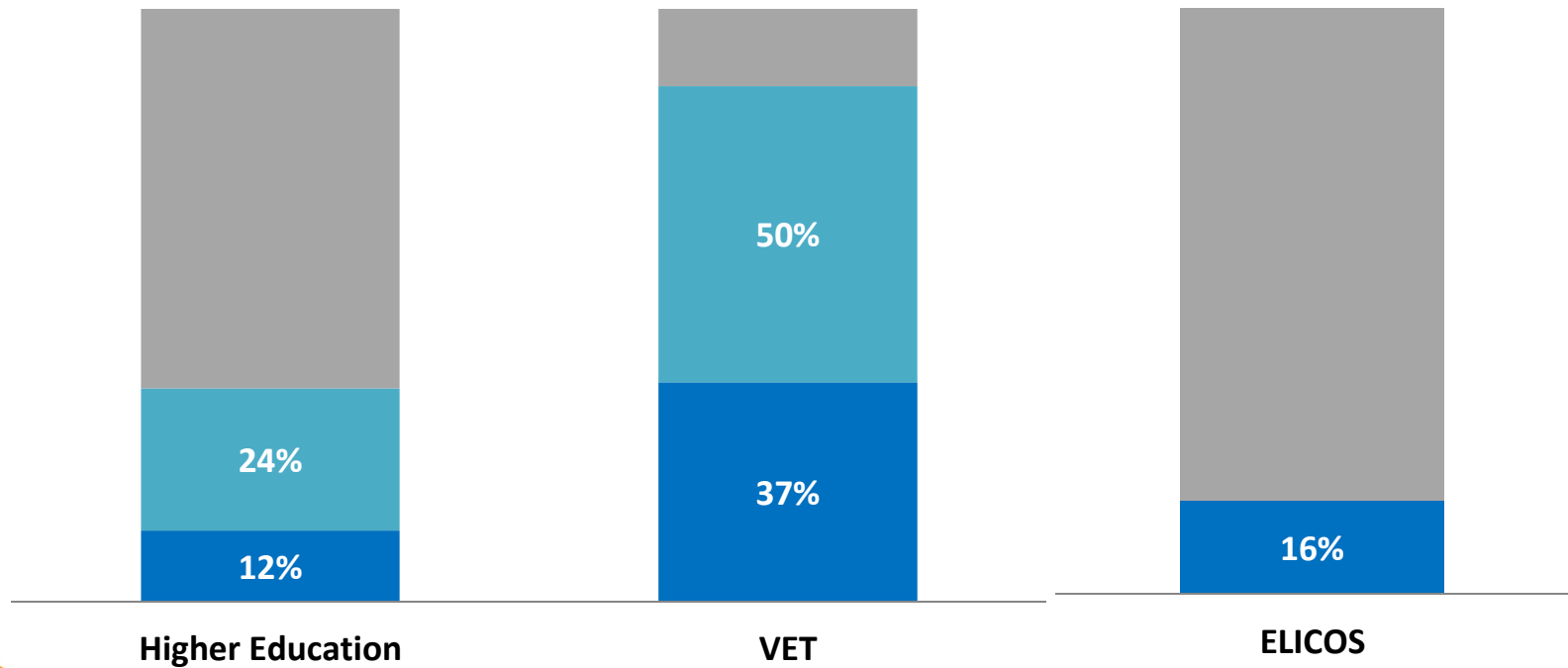
Higher Education



VET



Working and Field of Study

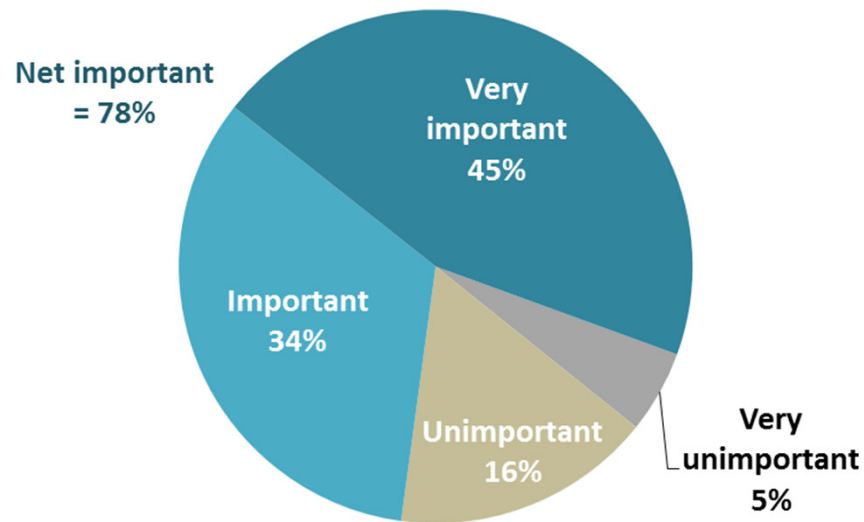


■ Work not directly related to field of study
■ Work directly related to field of study

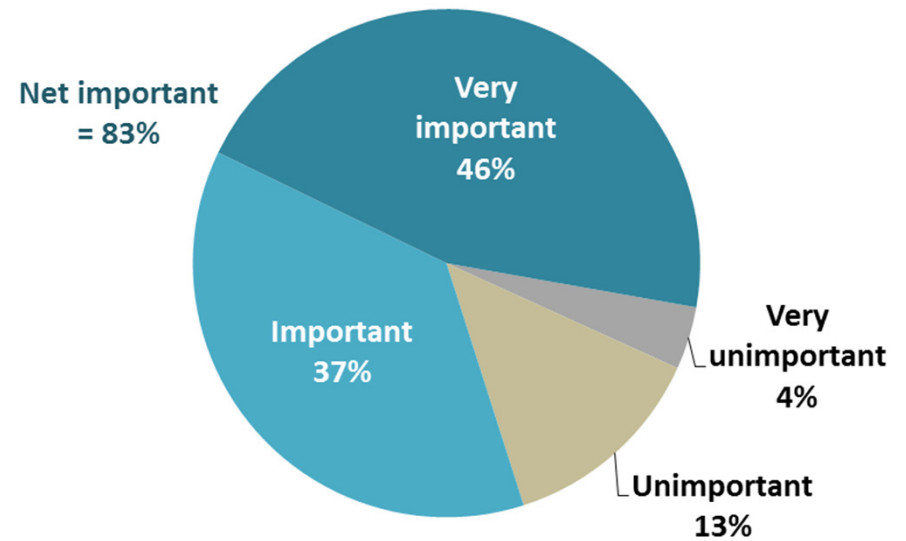
■ Working

Opportunity for work in Australia after study

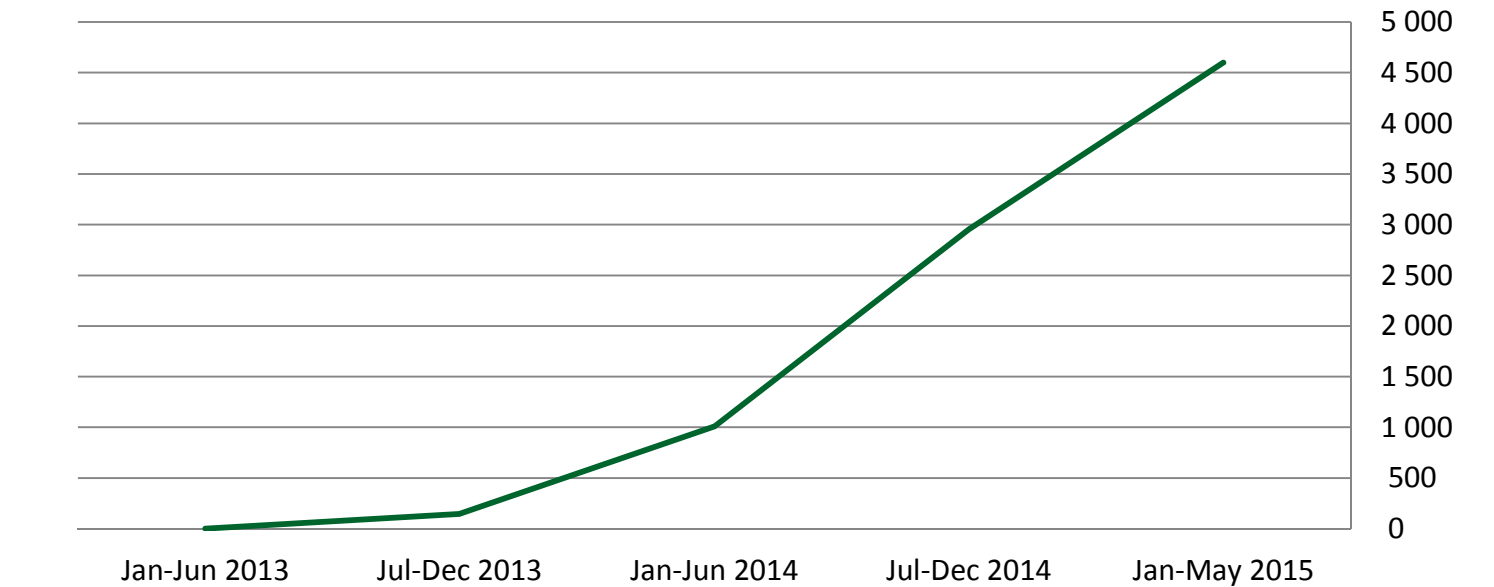
Higher Education



VET



Subclass 485 Post Study Work Visa Lodged*



International graduates, 2014:

Bachelors: 26,000
Masters (C/w): 28,000
Masters (Res): 200
PhD: 1,600.

*by applicants whose student visa (primary holders) expired in the same period

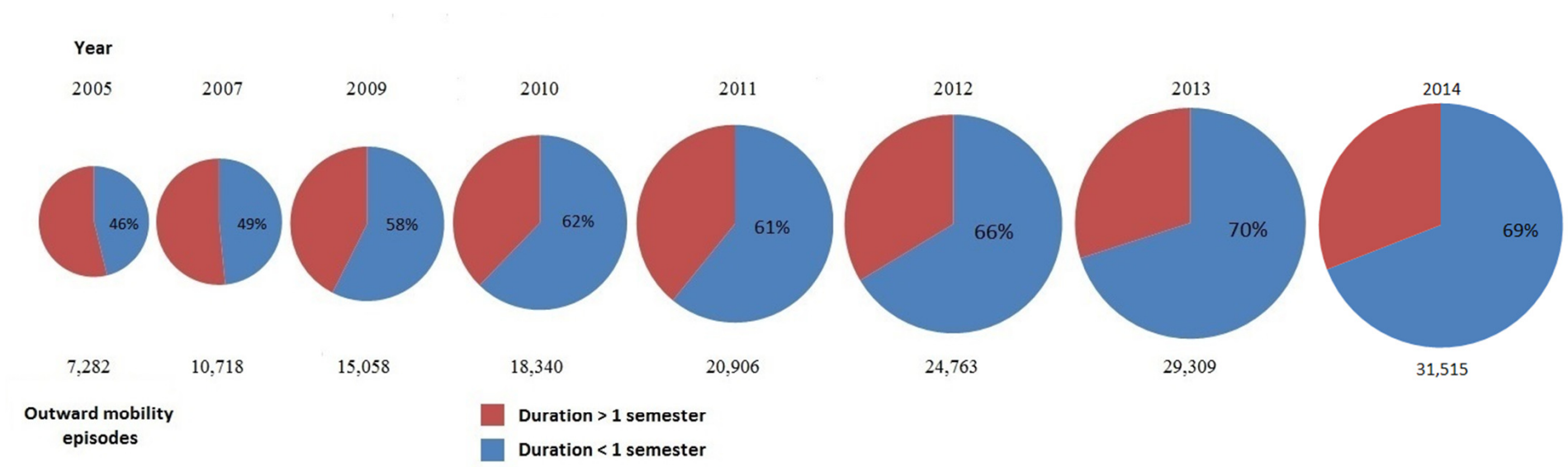


Student mobility

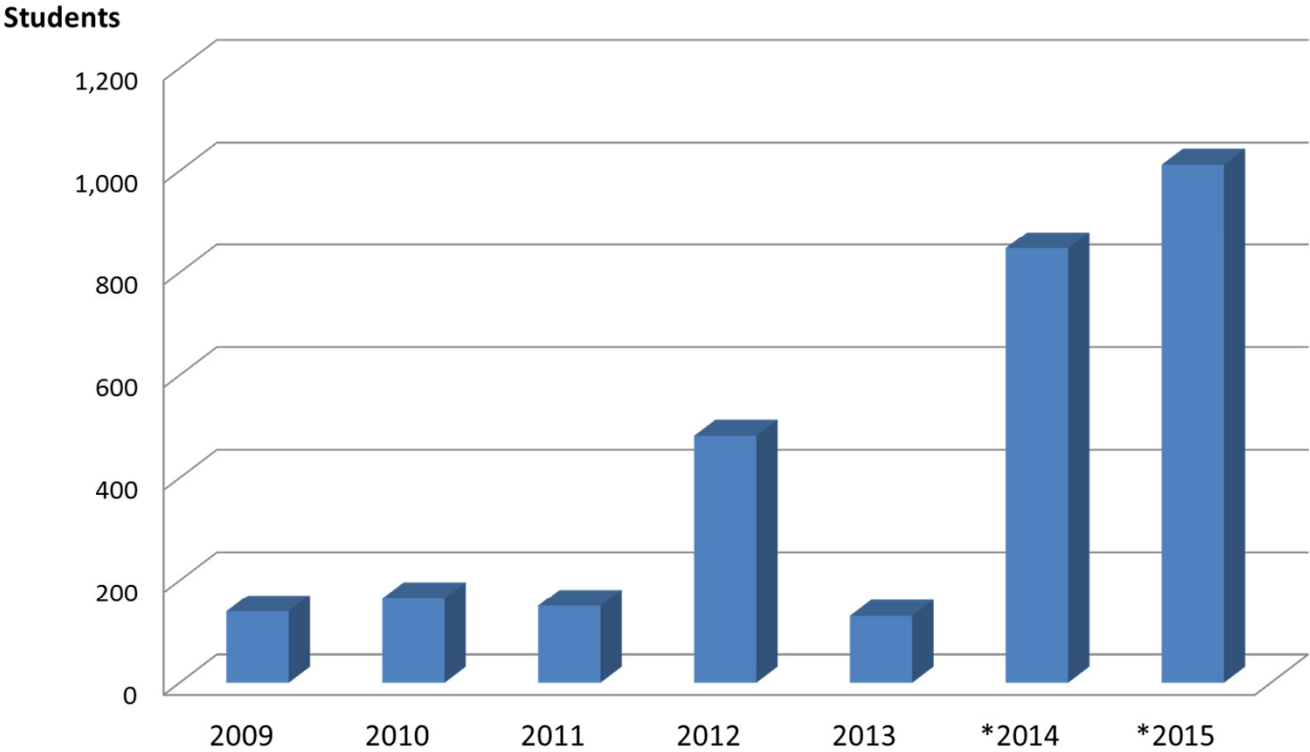
Students from Australian education
students studying overseas



Australian student mobility – 2005 to 2014



Outbound VET students



* Includes AsiaBound VET



Around \$750 million to support international student mobility in 2013

Australian Government support for international students		
Scholarships and Fellowships	Number	Total value
2013 Round Endeavour Scholarships and Fellowships (465 Non-Australians + 151 Australians)	616	\$32.2 million
International Postgraduate Research Scholarships (IPRS)	330	\$20 million
Australia Awards (Scholarships and Fellowships) Department of Foreign Affairs and Trade	4,500	\$310.0 million
Total	5,446	\$362.2 million

Australian university support for international students	
Type of students	Total value
Postgraduate research students	\$334.6 million
Other students	\$29.8 million
Total	\$364.4 million



Provider mobility

Australian providers teaching overseas

(also known as transnational education)



Australian higher education provider mobility

Higher education delivery to international students					
Delivery to	Students			% Growth	
	2012	2013	2014	2013	2014
International students in Australia	215,592	218,286	236,156	1.2%	8.2%
Students at offshore campuses	82,468	84,785	85,873	2.8%	1.3%
Distance education students offshore*	25,552	25,331	25,531	-0.9%	0.8%
<i>Sub-total of all trans-national students**</i>	<i>108,020</i>	<i>110,116</i>	<i>111,404</i>	<i>1.9%</i>	<i>1.2%</i>
Grand Total	323,612	328,402	347,560	1.5%	5.8%

* includes online learning and correspondence students studying award courses.

** includes around 500 Australian domestic students studying from another country.



Australian universities offshore 2014

<i>International Campus</i>	<i>Australian Institution</i>	<i>Country</i>
1. Ngee Ann-Adelaide Education Centre	The University of Adelaide	Singapore
2. International Study Centre, Dubai	Murdoch University	UAE
3. Curtin in Singapore	Curtin University	Singapore
4. Curtin in Sarawak		Malaysia
5. HK Management Association (HKMA)	University of Technology, Sydney	Hong Kong
6. Shanghai University		
7. Singapore Institute of Aerospace Engineers		
8. SEG International Penang	University of Southern Queensland	Malaysia
9. SEG International Sarawak		
10. SEG International Kuala Lumpur		
11. SEG International Subang Jaya		
12. SEG International Kota Damansara		
13. AGSM	University of New South Wales	Hong Kong
14. Swinburne University of Technology, Sarawak Campus	Swinburne University of Technology	Malaysia
15. RMIT International University	RMIT University	Vietnam
16. University of Newcastle, Singapore	University of Newcastle	Singapore
17. Monash University South Africa	Monash University	South Africa
18. Monash University Malaysia		Malaysia
19. JCU Singapore	James Cook University	Singapore
20. Australian College of Kuwait	Central Queensland University	Singapore
21. INTI Laureate	University of Wollongong	Malaysia
22. UOW Dubai Campus		UAE
23. Royal Institute of Management	University of Canberra	Bhutan
24. EAST China University of Science and Technology		China
25. Hangzhou Normal University		Hong Kong
26. Harbin Normal University		Singapore
27. Ningbo University		Vietnam
28. Lingnan Institute of Further Education		
29. School of Continuing Education Hong Kong Baptist University		
30. M2 Academy (previously called: Asia Global Graduate School)		
31. International Education Institute (IEI), VNU HCMC		

14 Australian universities have offshore campuses, but 34 universities and 4 other higher education providers had offshore programs in 2014.

The 14 universities with campuses accounted for 70% of all students enrolled offshore.

The top 3 universities with the largest number of offshore students were:
RMIT;
Monash; and
Murdoch.

Mobile VET providers

- In 2013, Australian public VET providers reported 49,740 student enrolments outside Australia (72% in China).
- In 2011, Australian private VET providers reported 6,771 students enrolled outside Australia (31% in Singapore).
- Only 15 students from India were reported enrolled in public VET providers (in 2013).



Online education (including MOOCs)

Coursera statistics

- The company commenced in 2012.
- 25 million people have enrolled,
1 million (4%) have completed courses.



Online education (including MOOCs)

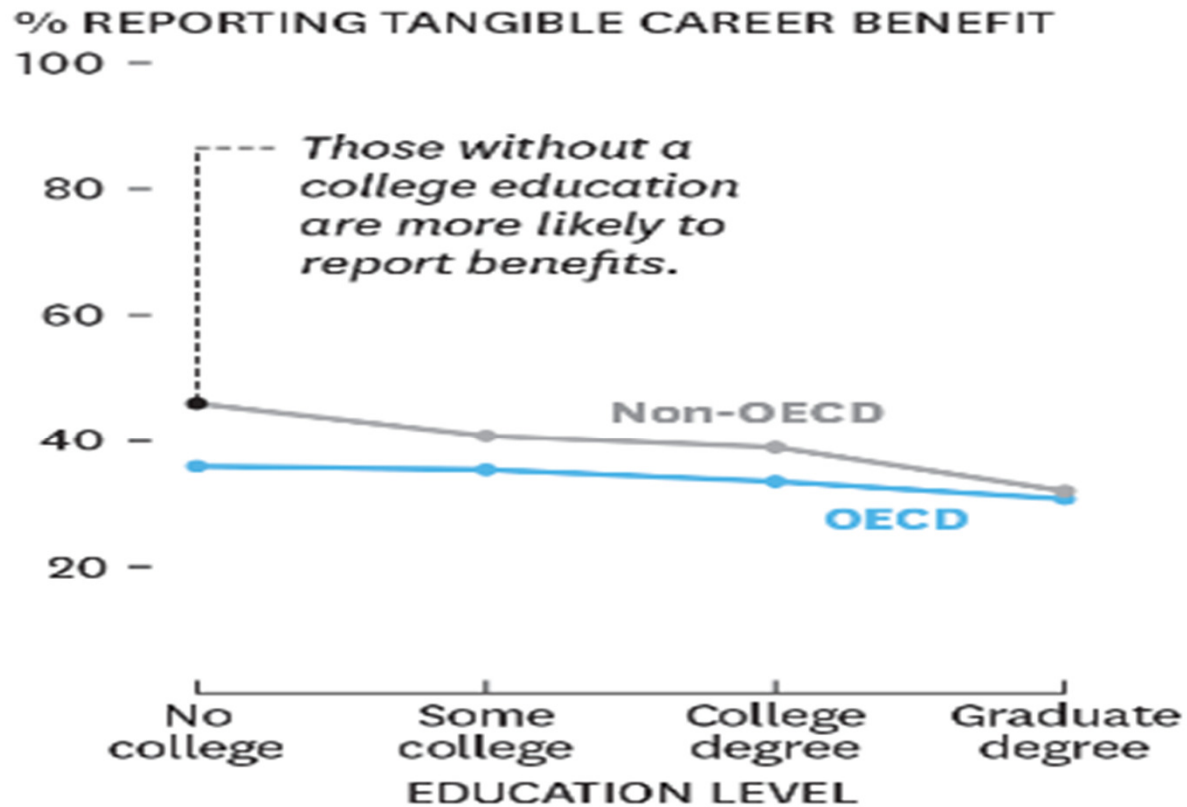
A 2015 survey of completed students found:

- 75% were over the age of 30.
- 72% reported a career benefit –
e.g. 26% found a new job, 6% got a pay rise.
- 61% reported an education benefit –
e.g. 12% course prerequisite, 8% degree credit.

(Source: Harvard Business Review report)



Who is getting benefit from MOOCs?



SOURCE COURSERA SURVEY DATA

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What is an appropriate annual growth rate for Australian international education?

- a) 2%
- b) 7.2%
- c) 12%



(There is no right answer)