

Challenging Market Challenges: China

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Today

- Where are we now and where to next?
- China market challenges
- Addressing the challenges:
Initiatives for FY19-20

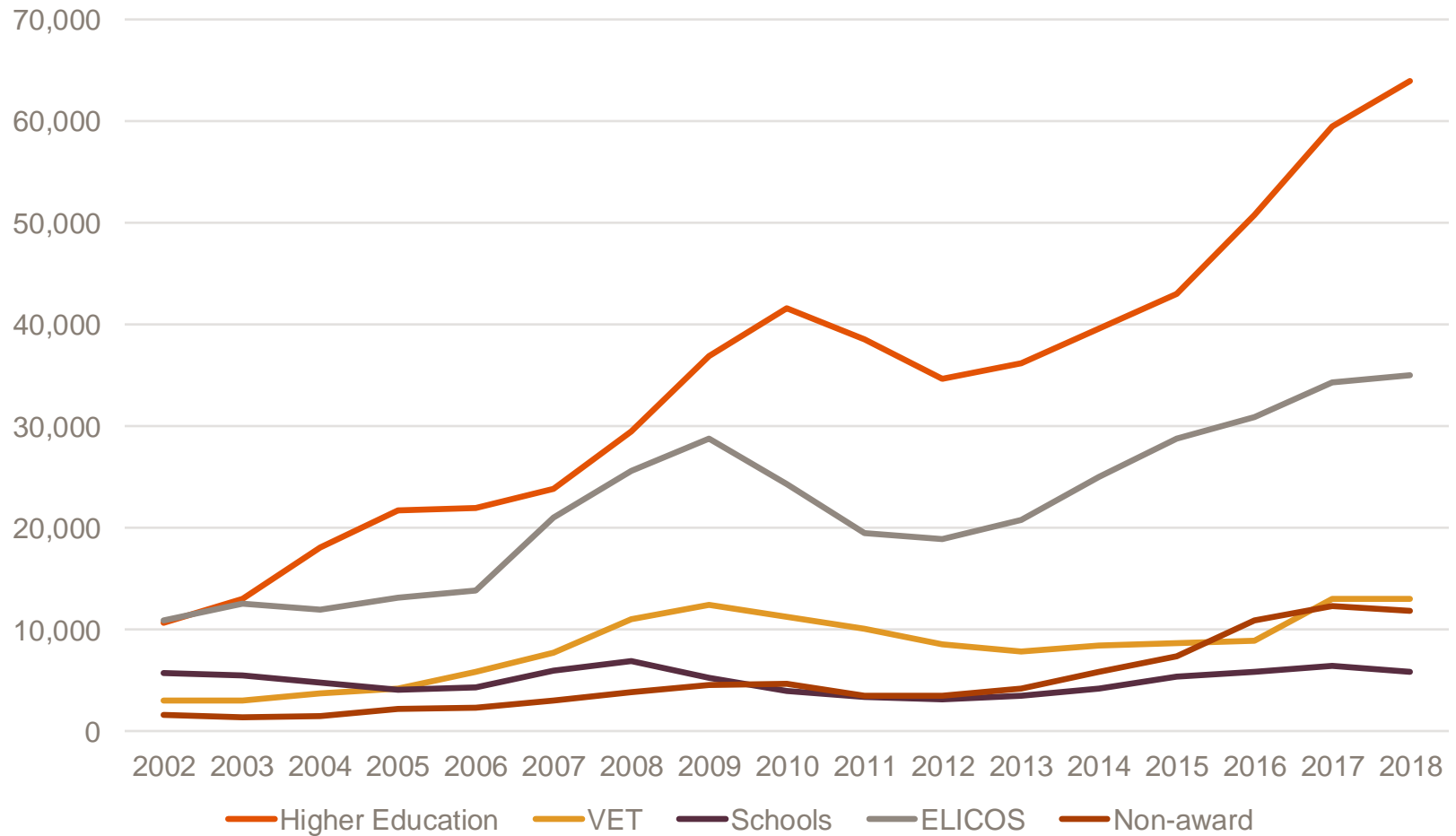
Where are we now and where to next?

China Market Trends



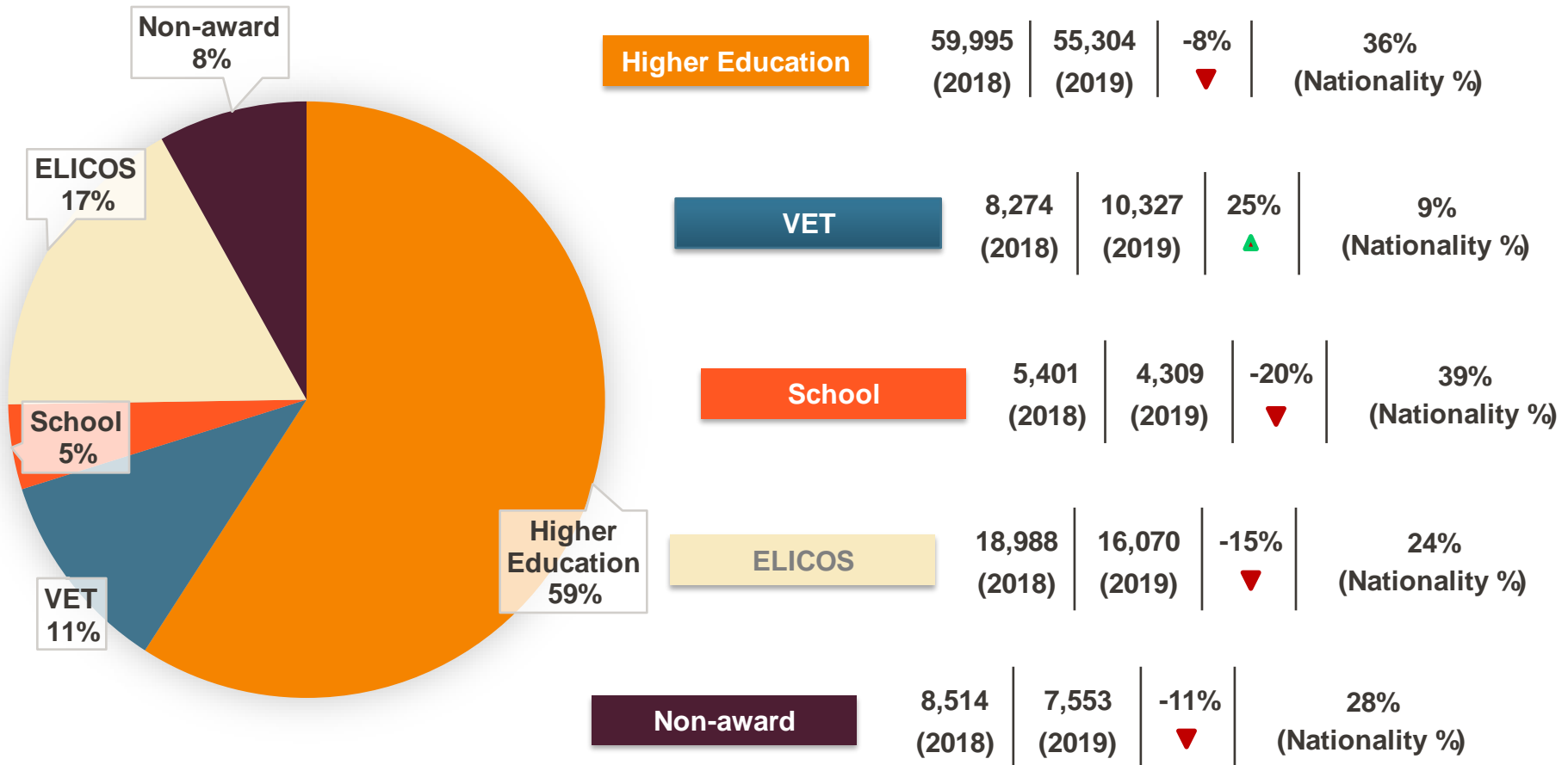
COMMENCEMENTS - 2002-2018 - CHINA OVERVIEW

Commencements – China



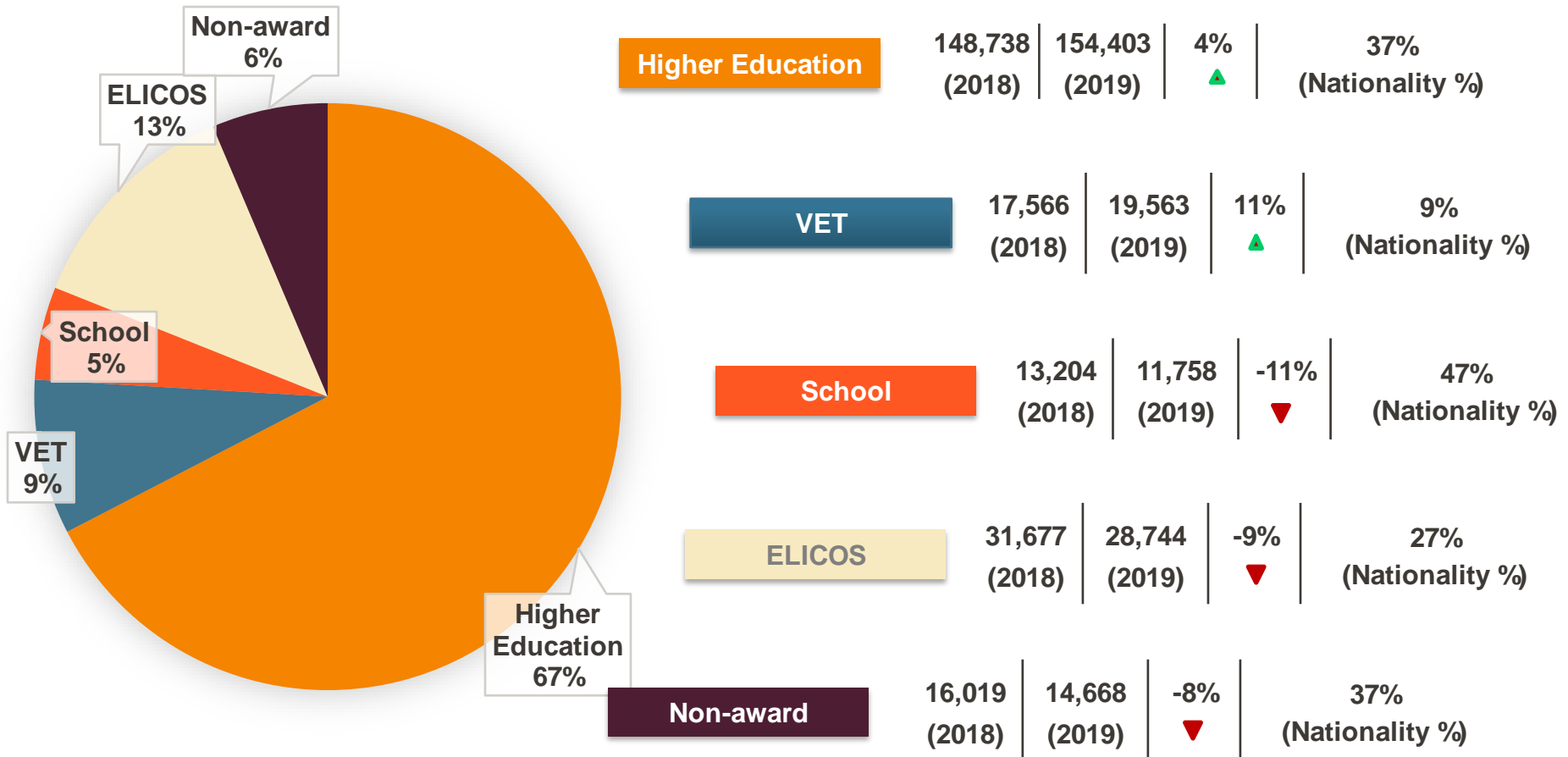
COMMENCEMENTS - CHINA – YTD JULY 2019

93,563 (-8%) & 25% of all commencements by nationality



ENROLMENTS - CHINA – YTD JULY 2019

229,136 (+1%) & 28% of all enrolments by nationality



AUSTRALIAN MARKET SHARE COMMENCEMENTS: CHINA YTD JULY 2019

State	2018	2019	% Growth	% of Australian Market Share
NSW	37,404	32,123	-14%	34%
VIC	34,160	32,344	-5%	35%
QLD	13,488	13,792	2%	15%
SA	5,674	5,734	1%	6%
WA	3,502	3,471	-1%	4%
TAS	1,877	2,179	16%	2%
NT	122	164	34%	0%
ACT	4,945	3,756	-24%	4%

Source: Department of Education Data

CHINESE STUDENT VISAS LODGED OFFSHORE

FY2016-2017	FY2017-2018	FY2018-19
55,853 (11%)	58,646 (5%)	55,946 (-4.6%)

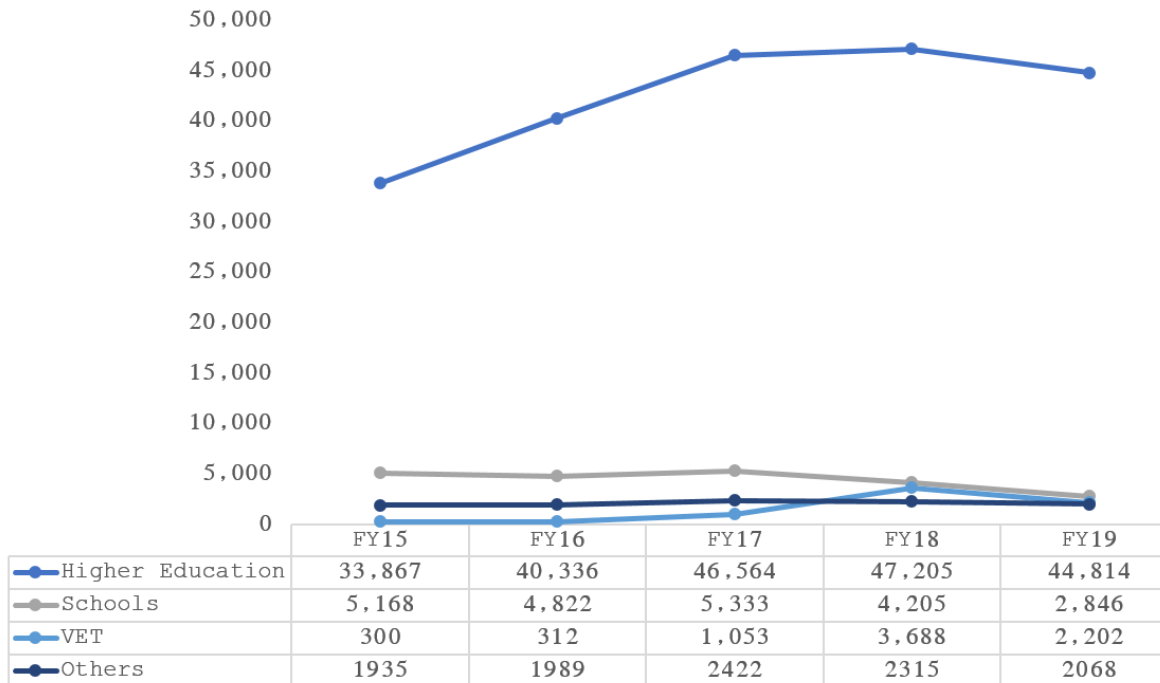
Sum of Total		Financial Year of Visa Lodged	2016-17	2017-18	2018-19 to 30 June 2019
Applicant Type	Sector				
☐ Primary	Foreign Affairs or Defence Sector		14	23	14
	Higher Education Sector		46,224	46,734	45,421
	Independent ELICOS Sector		419	432	434
	Non-Award Sector		1,088	1,068	978
	Postgraduate Research Sector		992	1,074	1,106
	Schools Sector		5,506	4,202	3,270
	Vocational Education and Training Sector		1,610	5,113	4,723
Primary Total			55,853	58,646	55,946
☐ Secondary	Foreign Affairs or Defence Sector		<5		
	Higher Education Sector		732	633	565
	Independent ELICOS Sector		13	14	6
	Non-Award Sector		5	9	6
	Postgraduate Research Sector		220	161	168
	Schools Sector		<5	17	<5
	Vocational Education and Training Sector		145	190	218
Secondary Total			1,120	1,024	964
Grand Total			56,973	59,670	56,910

Source: Department of Home Affairs

CHINESE STUDENT VISAS GRANTED OFFSHORE

Chinese Student Visa Grant By Study Sector, FY15-FY19

Chinese Student Visa Granted By Study Sector



FY19 Performance Overview

Higher Education

Market Share
80% YoY%
-5%

School

Market Share
5.5% YoY%
-32%

VET

Market Share
4.2% YoY%
-40%

Source: Department of Home Affairs


China market challenges





China market challenges

 Slowdown in economic growth

 Rapid growth of China's bilingual school market

 Ensuring the student experience

 HE market perceptions

 VET sector

 Global competitors

 Bilateral relationship

 China as a competitor

Addressing the challenges: Initiatives for FY19-20



INITIATIVES FY19-20

September

China Skills
Needs Heat Map

November

Industry Aligned Skills
Mission (Tourism
Destination Solutions
and Training Focus)

November

Australian Edtech
Showcase at Global
Education Technology
Summit 2019

December

TNE School
Development Guide

February

China-Australia
Education Business
Planning Summit

March

International school
outreach in second tier
markets

April - June

Northern Australia
China Education
Strategy and Social
Media Campaign

June

International school
counsellor training

Thank you



Australian Government
Austrade



Australia
UNLIMITED