

# Beyond China

Sustaining future education markets

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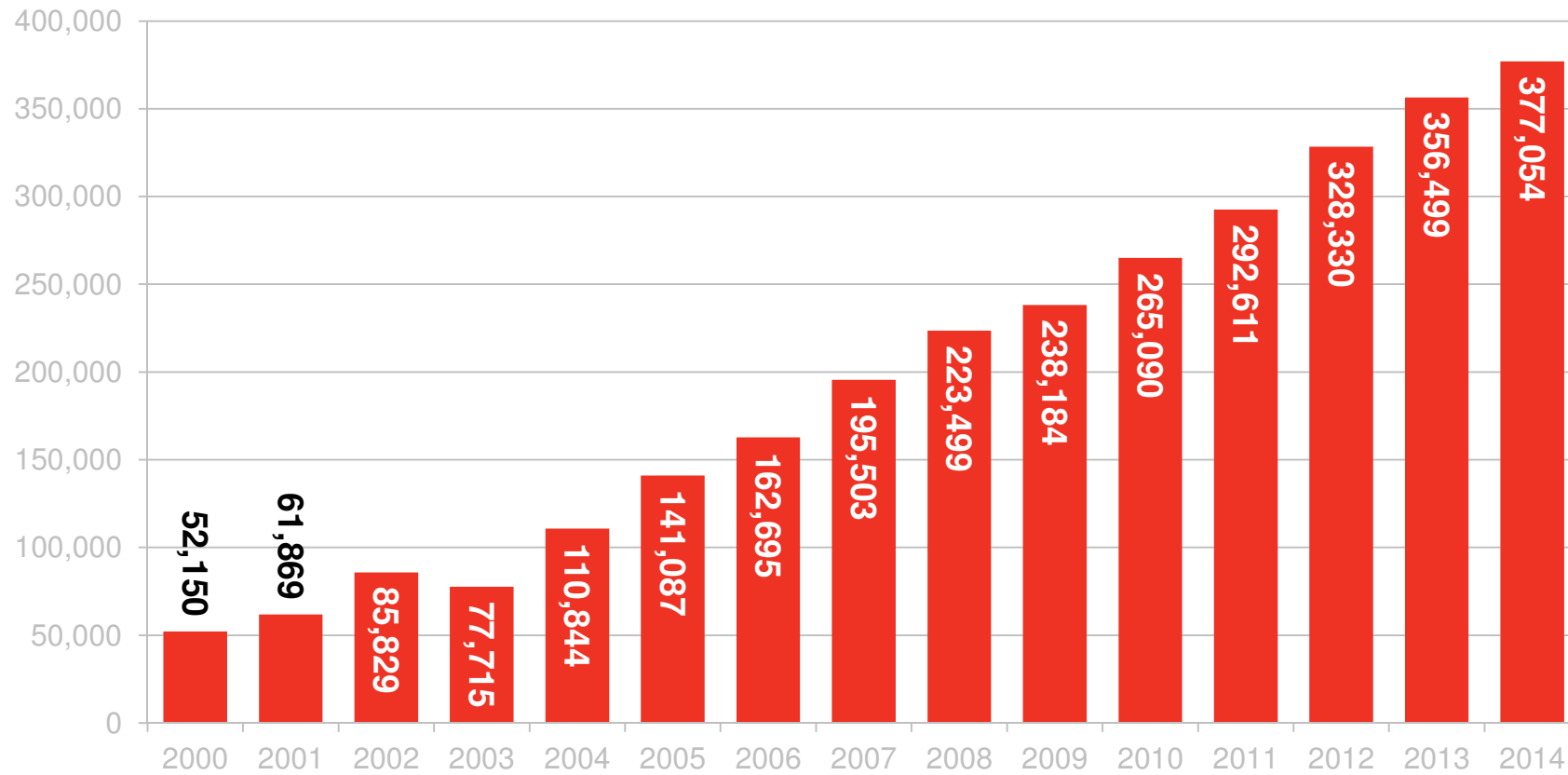


# China: a new competitor

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## International enrolments in Chinese universities: 2000-2014



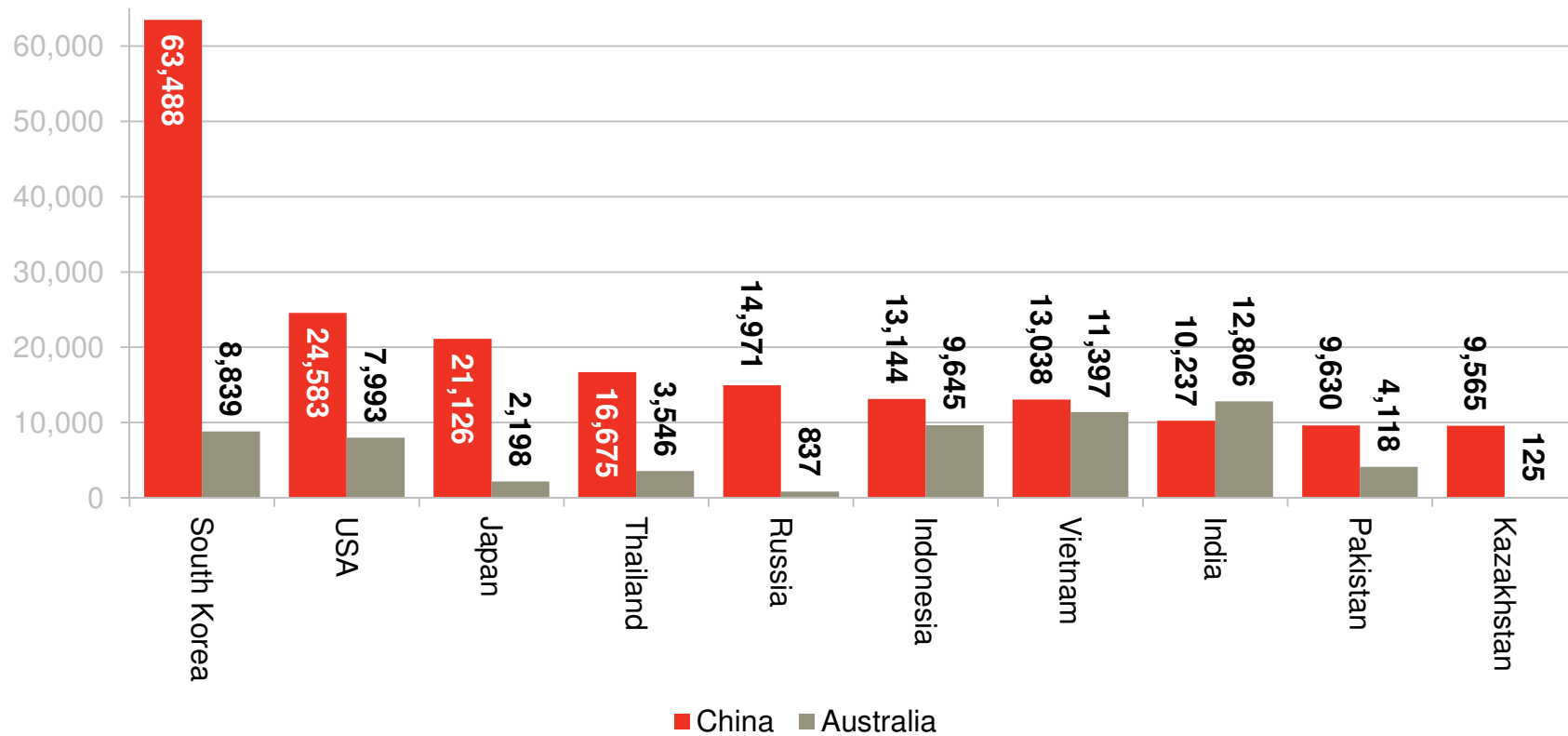
Source: [www.studyinchina.edu.cn](http://www.studyinchina.edu.cn)

## International enrolments in China and Australia: 2002-2014



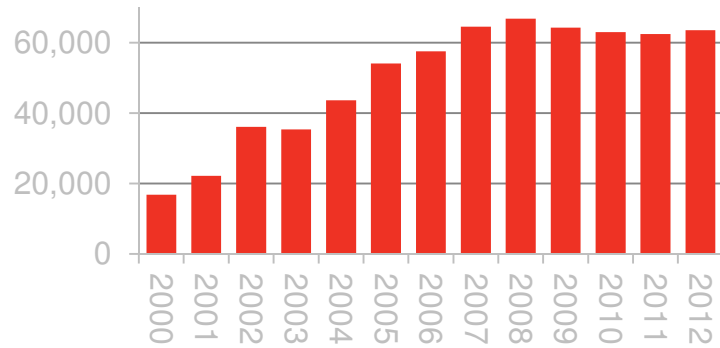
Source: [www.studyinchina.edu.cn](http://www.studyinchina.edu.cn), [www.austrade.gov.au](http://www.austrade.gov.au)

## International enrolments in Chinese and Australian universities by country, 2012

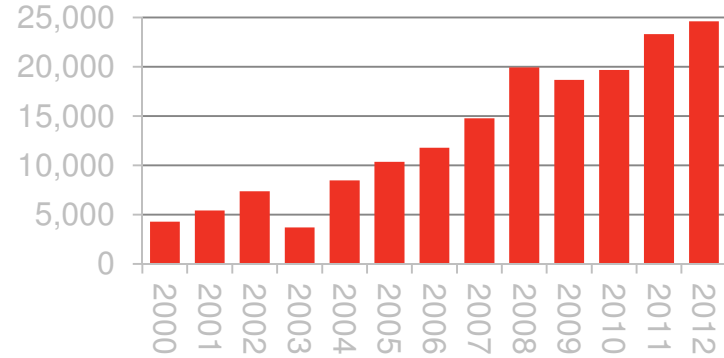


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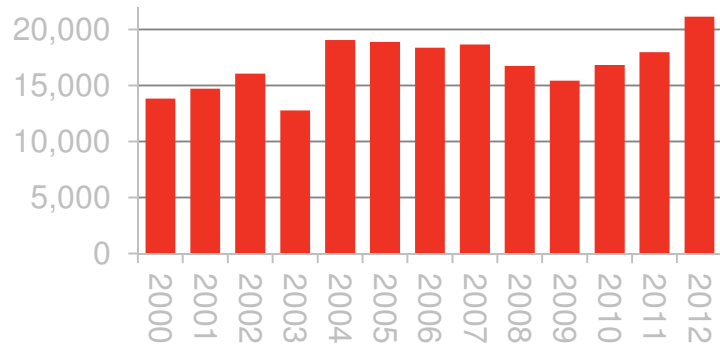
## South Korea



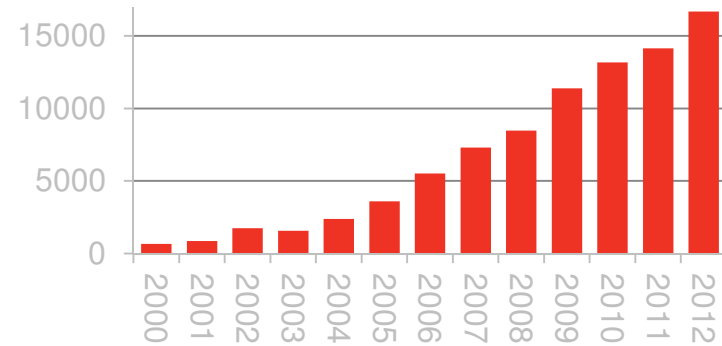
## USA



## Japan

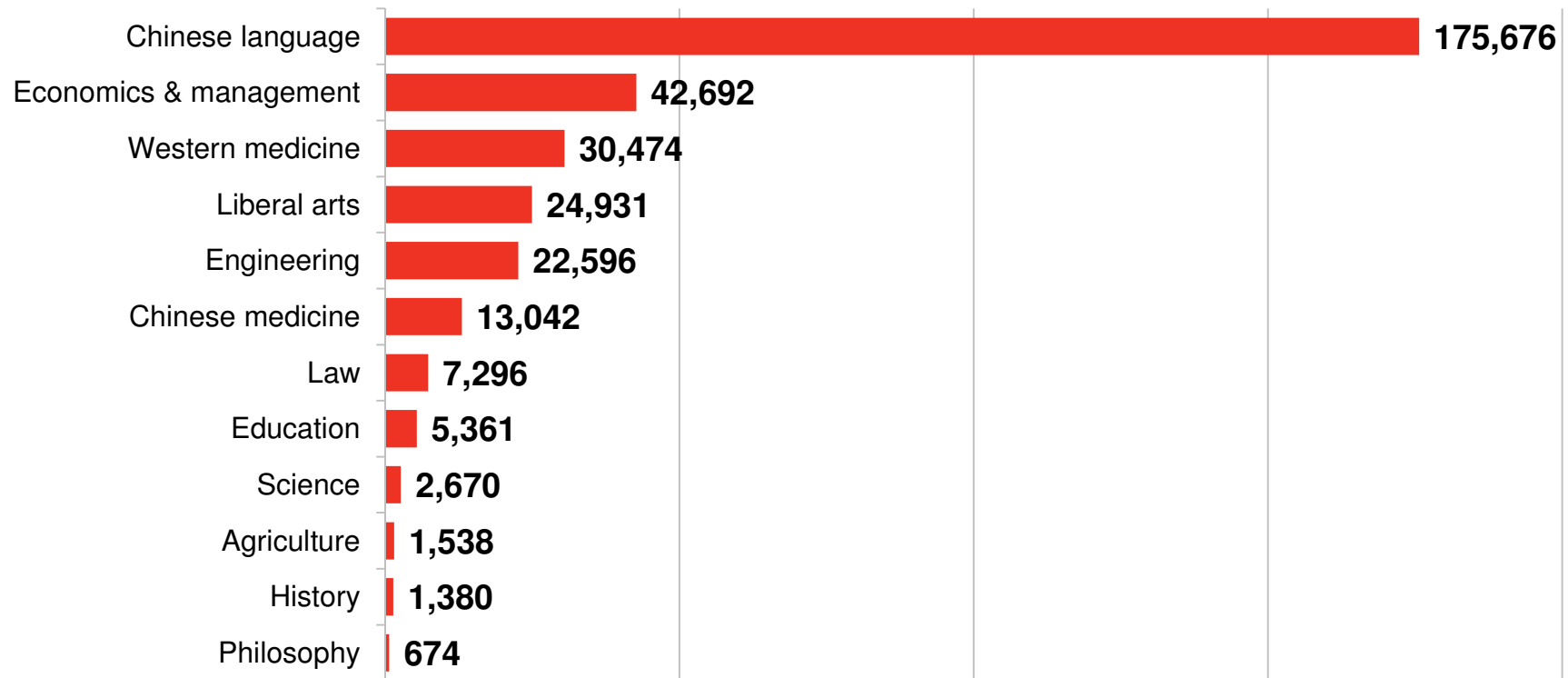


## Thailand



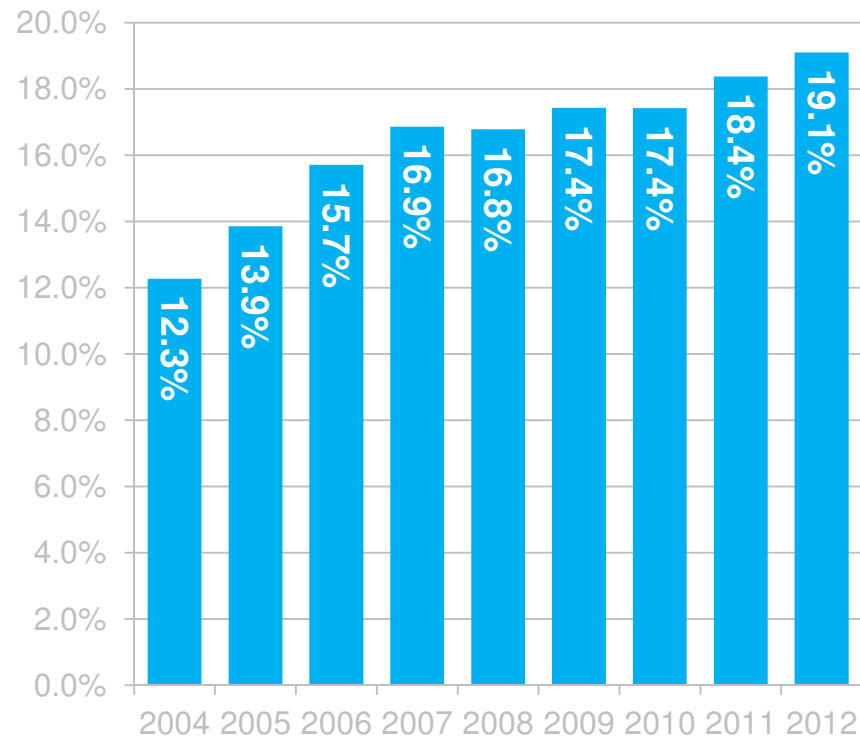
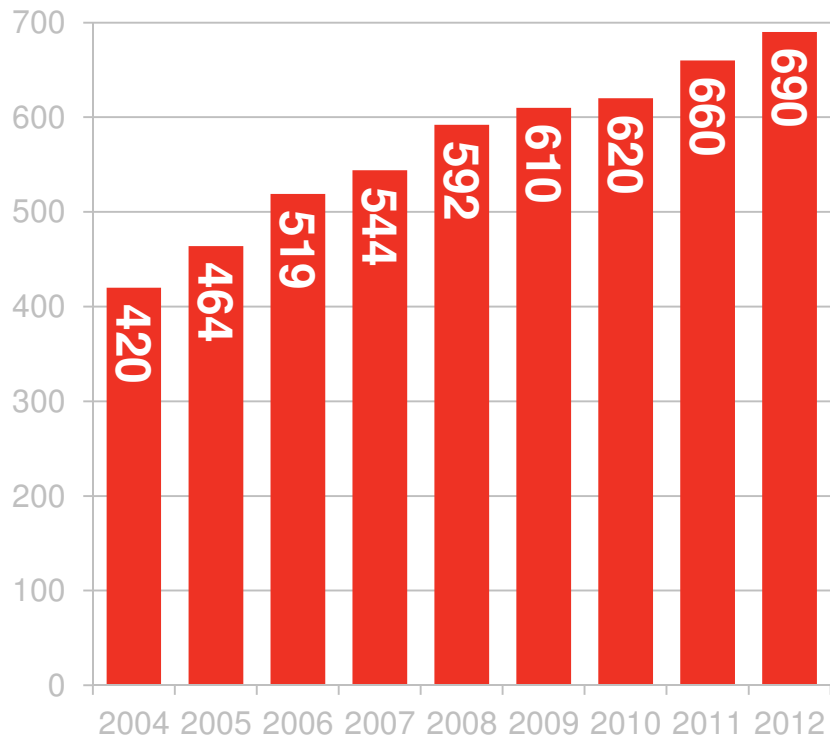
Source: [www.studyinchina.edu.cn](http://www.studyinchina.edu.cn)

## International enrolments in Chinese universities by field of study, 2012



Source: [www.studyinchina.edu.cn](http://www.studyinchina.edu.cn)

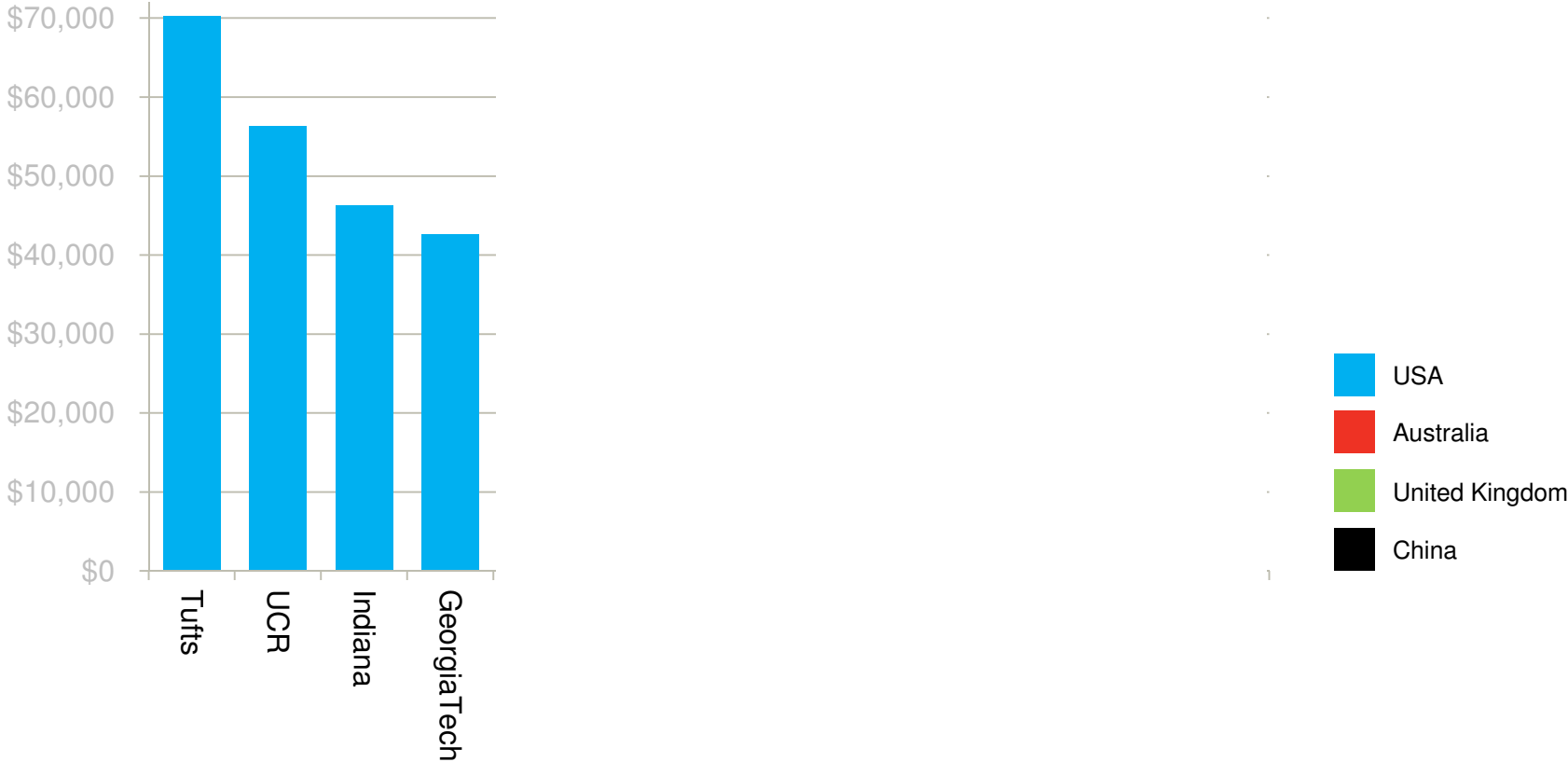
## Number of Chinese universities hosting international students, 2004-2012



Source: [www.studyinchina.edu.cn](http://www.studyinchina.edu.cn)



# Tuition fees (in AUD\$): China vs. USA, UK and Australia



## Growth in other international competitors

- **Malaysia** up more than 25% between 2010 (87,000) and 2015 (110,000 est.)
- **Japan** up more than 12% between 2011 (164,000) and 2014 (184,000).
- **Singapore** had 84,000 in 2012 – laws stop international students from taking more than 20% of places.
- **South Korea** down 5% between 2011 (90,000) and 2014 (85,000).

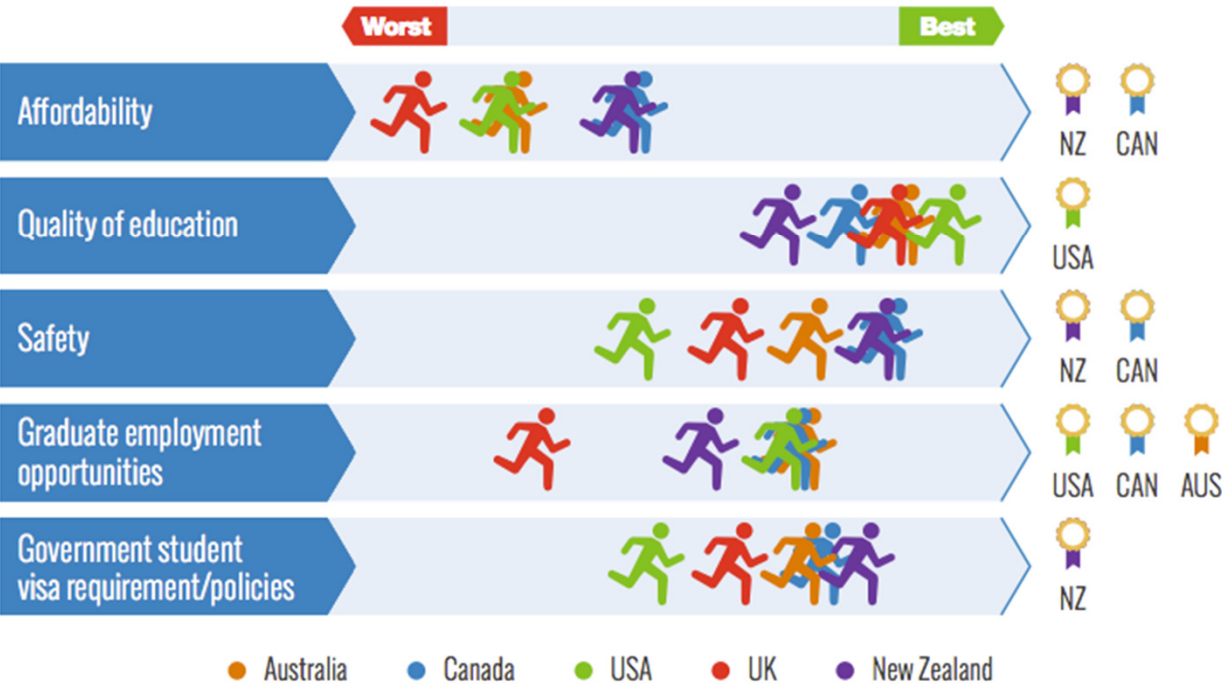
Source: JASSO, Project Atlas, Malay Mail, Asia One, Times Higher Education

What does Australia offer?

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# IDP student perceptions of five English speaking destinations



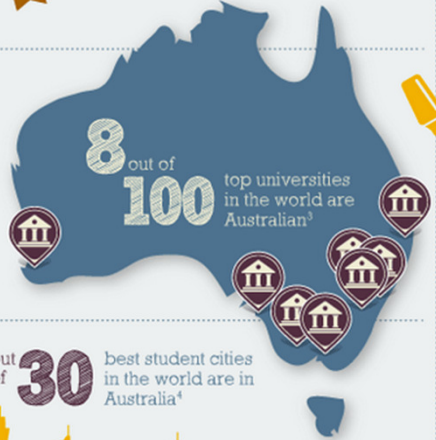
## AUSTRALIA'S EDUCATION SYSTEM



**3rd**

most popular international student destination in the world despite having a population of only 23 million<sup>1</sup>

**22,000**  
courses  
**1,100**  
institutions<sup>2</sup>



University System Ranking



**5** out of **30**

best student cities in the world are in Australia<sup>4</sup>

**9th**  
in the world  
ahead of Germany,  
New Zealand and Japan<sup>5</sup>

**>\$200,000,000** Annual Government investment on international scholarships<sup>6</sup>

Source Studyinaustralia.gov.au

# China Increasing Research Output

“The majority of the ranked Chinese institutions are increasing their research output, spurred by the impressive and sustained level of public and private investment, second only to the U.S.”

Ben Sowter (QS Rankings Head of Research)

10 June 2015

# China biggest provider in Asia?

China is striving to become Asia's largest destination for overseas students. By 2020, it is planned that as many as 500,000 foreign students will be studying in Chinese Schools and institutions, including 150,000 in universities

source: MIP Education snapshot (December 2014)

# The importance of rankings...

“ Chinese parents and students traditionally scrutinise rankings when choosing institutions”

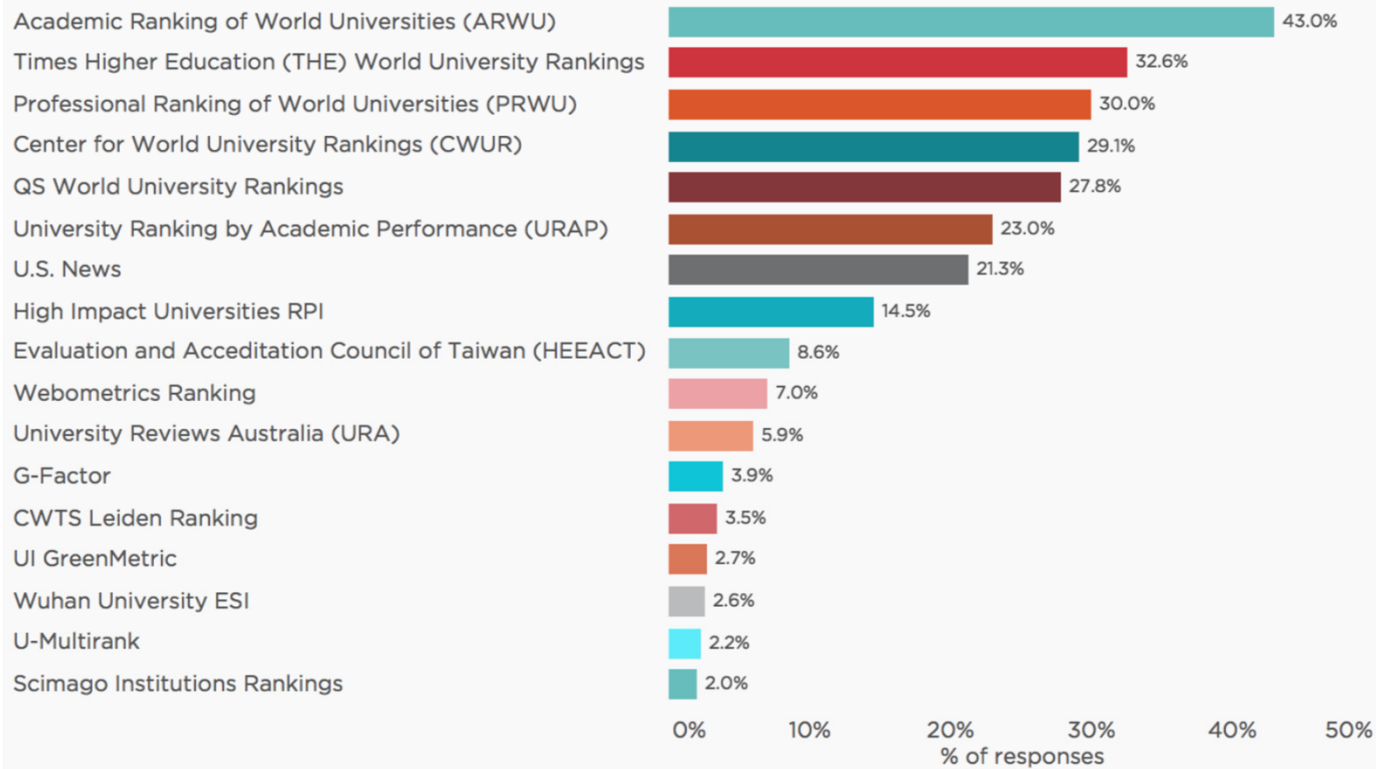
Source: China MIP (December 2014)

“High proportions of students use rankings systems to inform the decisions they make about where to study, due in large part to their ability to present complex data in an easy-to-digest format”

Source: Hobsons (August 2015)

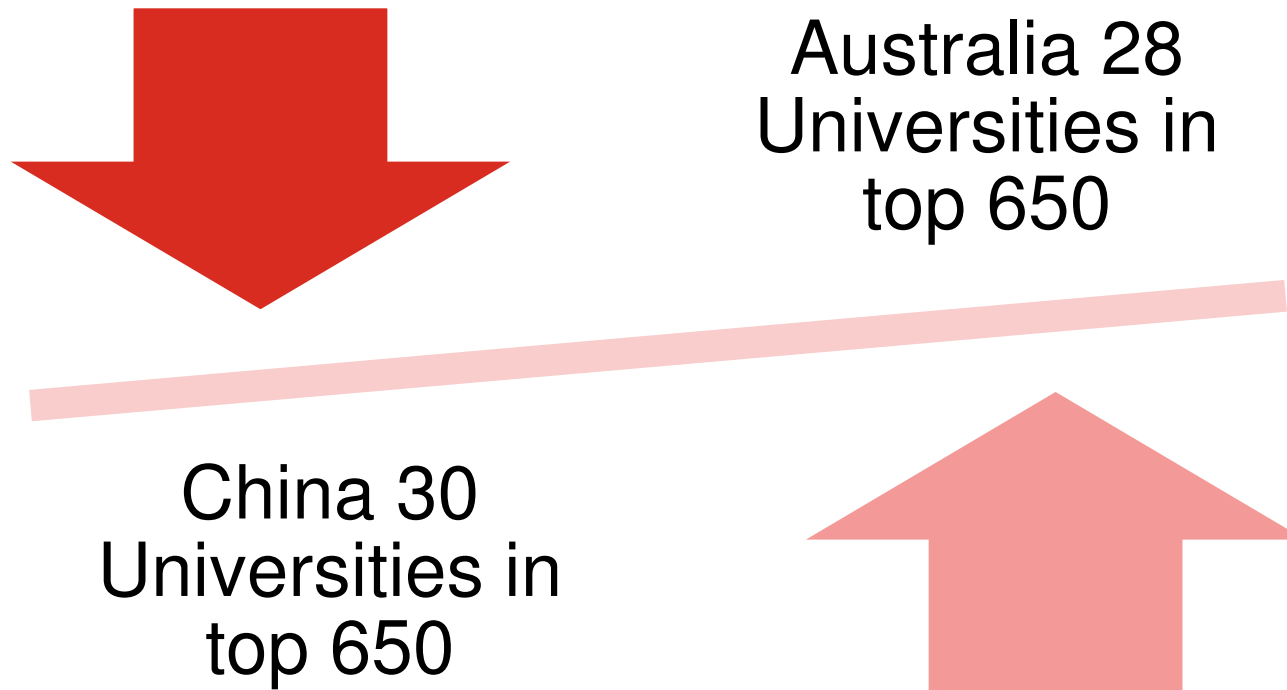


**FIGURE 14: WHEN COMPARING THE RANKINGS AND RATING OF INSTITUTIONS OR PARTICULAR SUBJECTS, WHICH WEBSITES OR LEAGUE TABLES DO YOU REFER TO?**

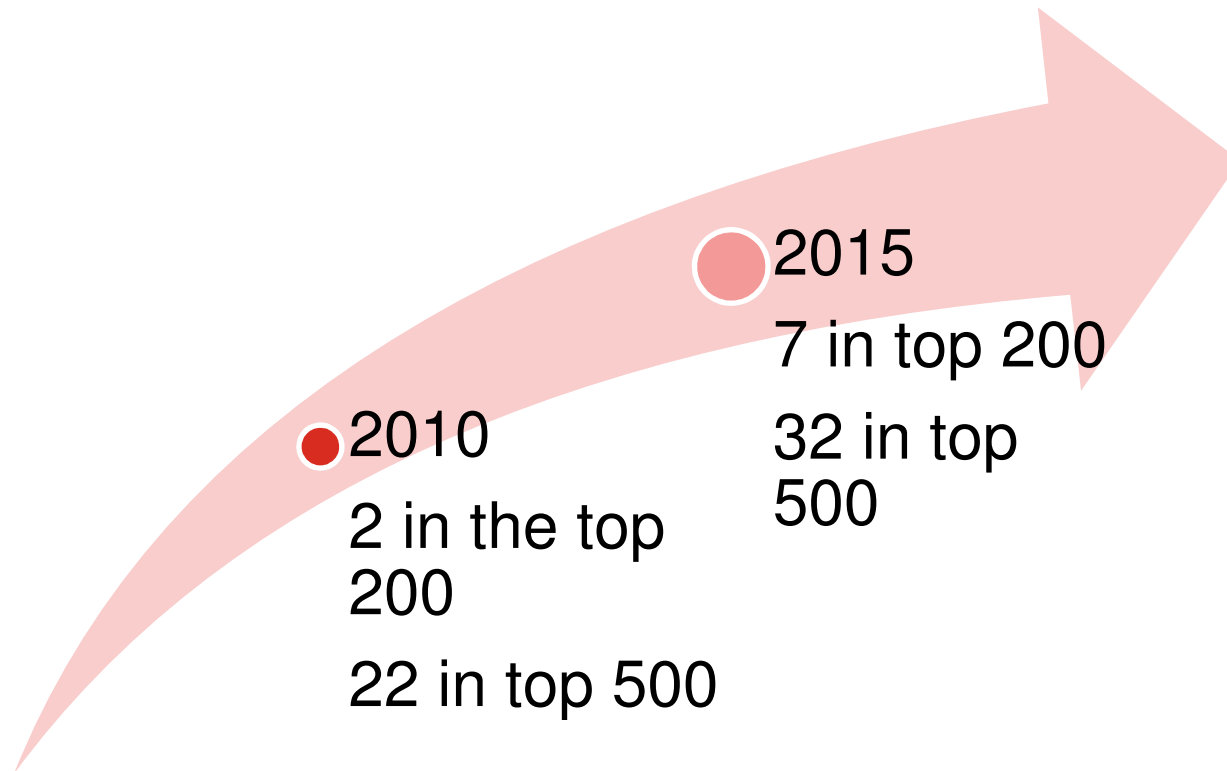


Source: Hobsons International Student Survey (August 2015)

## QS Rankings 2015 – China has parity in terms of elite institutions



But they are on the move...and have 4<sup>th</sup> largest number of universities in top 500 (Source: ARWU 2015)



# The Future...

The OECD projects that the number of students in higher education will rise by 100 million over the next quarter century (from 165 million in 2009 to 263 million in 2025), with the number of globally mobile students doubling over that period from 4 to 8 million.

“Universities Australia has rightly warned of the risk of Australian universities being left behind in intensifying international competition in higher education, and urged action to prevent this,”

Simon Birmingham - Minister for Education and Training in Australia  
(September 2015)

## Growing competition for international students

- China will not be our competitor soon: it is our competitor **now**.
- China is eating into Southeast and East Asian markets.
- Malaysia is eating into Middle East markets.
- The USA is waking up to the potential of international students: considering 6 years PSWR, shifting to use of education agents.

## Growing competition for international students

### China

Appeals to students looking to package Chinese language with their degree.

### Malaysia

Appeals to students looking to study in an Islam-friendly environment.

### USA/UK

Appeal to students seeking the highest-quality education opportunities.

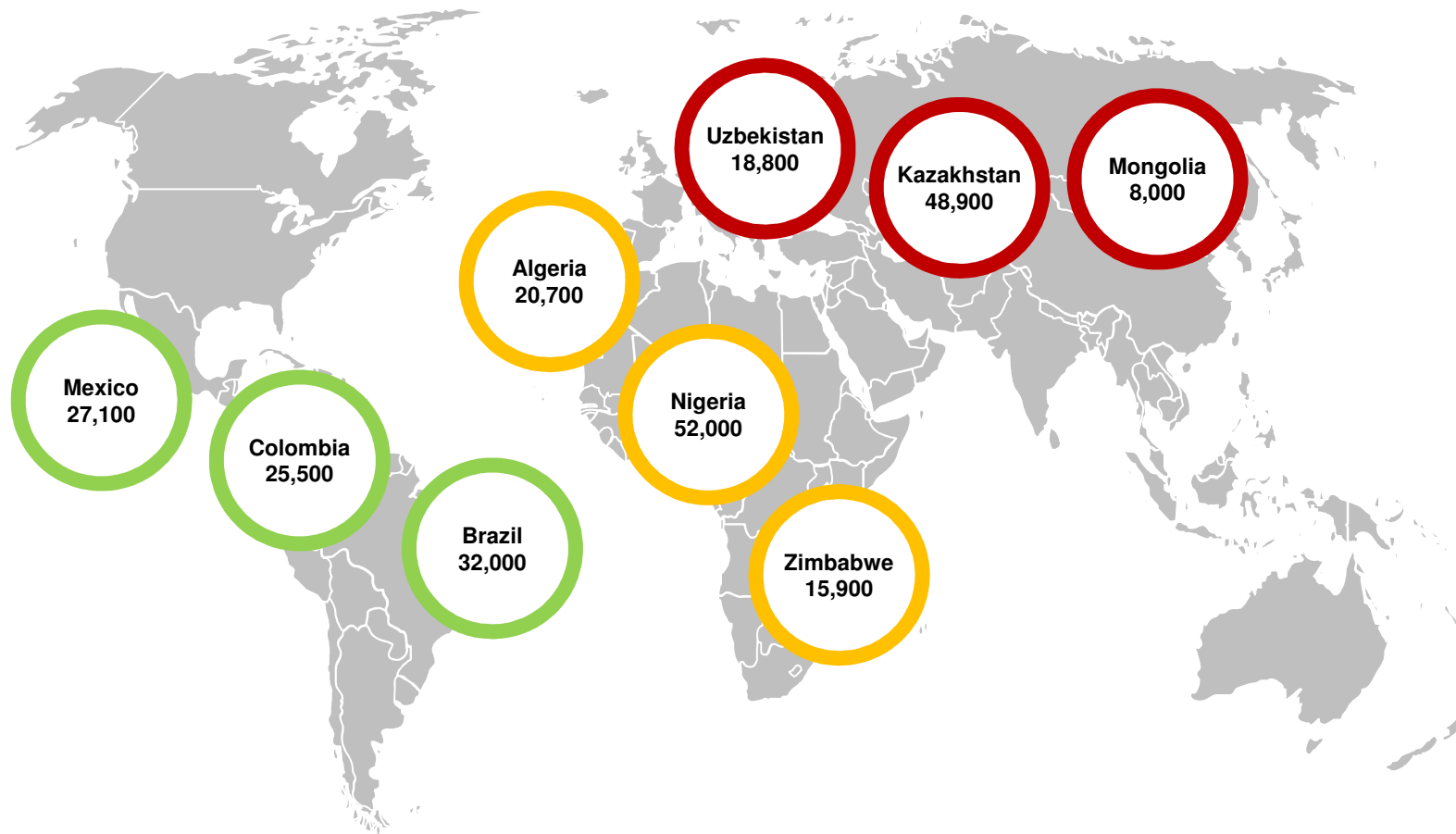
### Australia



## Australia's top five international markets: 2002 v. 2014

2002		2014	
China	17,512	China	89,520
Malaysia	14,357	India	26,269
Indonesia	12,847	Malaysia	14,334
Singapore	10,762	Vietnam	11,967
Hong Kong	9,987	Nepal	10,187

Source: Austrade/AEI



Source: UNESCO (2012)



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