



Australian International  
Education Conference

18 – 21 October 2016  
Melbourne Convention  
and Exhibition Centre

*Connectivity – at the heart of international education*

# INTERNATIONAL EDUCATION 101: WHAT YOU SHOULD KNOW

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# Schedule

- 10.30 – 10.35 Welcome
- 10.35 - 10.45 Ice-breaker
- 10.45 – 11.00 Part 1: The Big Picture
- 11.00 – 11.05 Question Time
- 11.05 – 11.20 Part 2: The Political Context
- 11.20 – 11.25 Question Time
- 11.25 – 11.40 Part 3: International Functions
- 11.40 – 11.45 Question Time



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## PART 1: THE BIG PICTURE



# What is international education?



- International student recruitment
- International admissions
- Student mobility
- International compliance and governance
- International student administration and student experience
- Transnational education (TNE)
- International partnerships, relations and networks
- Internationalised curriculum
- Pathways and ELICOS

# A possible definition?



It's a means to allow **students** to think with an **international** or **global** perspective through connecting them with different societies and belief systems which will help them understand and embrace cultural differences and similarities.

# Why does the industry exist?



- Soft diplomacy
- Enhances a nation's international standing
- Contributes to a dynamic, multicultural community
- Clever employers harness the benefits of international students in the workplace
- Cold hard cash – huge international service export industry (biggest in in Australia) – which keeps many education sectors afloat
- Huge knock on benefits to hospitality and tourism, entrepreneurial ventures, etc.

How important is it?

australias also strategy support including  
opportunities research work english  
higher australian global  
our national students new countries  
**education**  
**international**  
institutions uk australia world  
student government through  
language study overseas quality

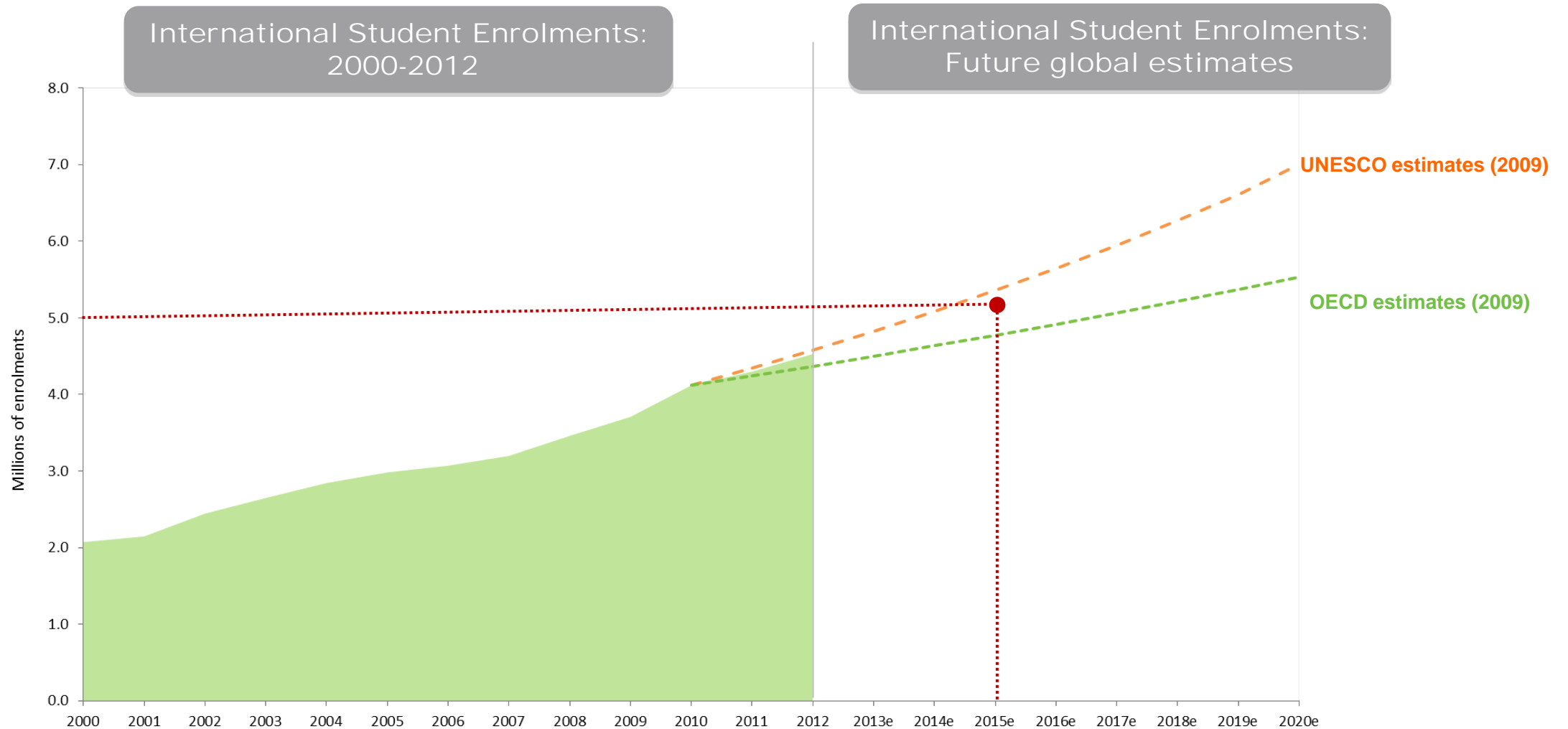
Word cloud created from international education strategies of USA, UK and Australia

# International education in Australia

1904:	First student
1950:	Colombo Plan instated
1985:	Full-fee paying program introduced
1990:	Subsidised student program ends
1991:	ESOS Act and CRICOS
1989-90:	IDP commenced recruiting students
2000:	ESOS updated, PRISMS and eCoEs
2004:	IEAA established
2009-10:	"The Perfect Storm"
2013:	Recovery commenced, particularly in Semester 2
2013:	New Colombo Plan 2014: Pilot program launched (Hong Kong, Indonesia, Japan and Singapore)
2014:	New Colombo Plan expanded
2016:	Release of National Strategy for International Education 2025

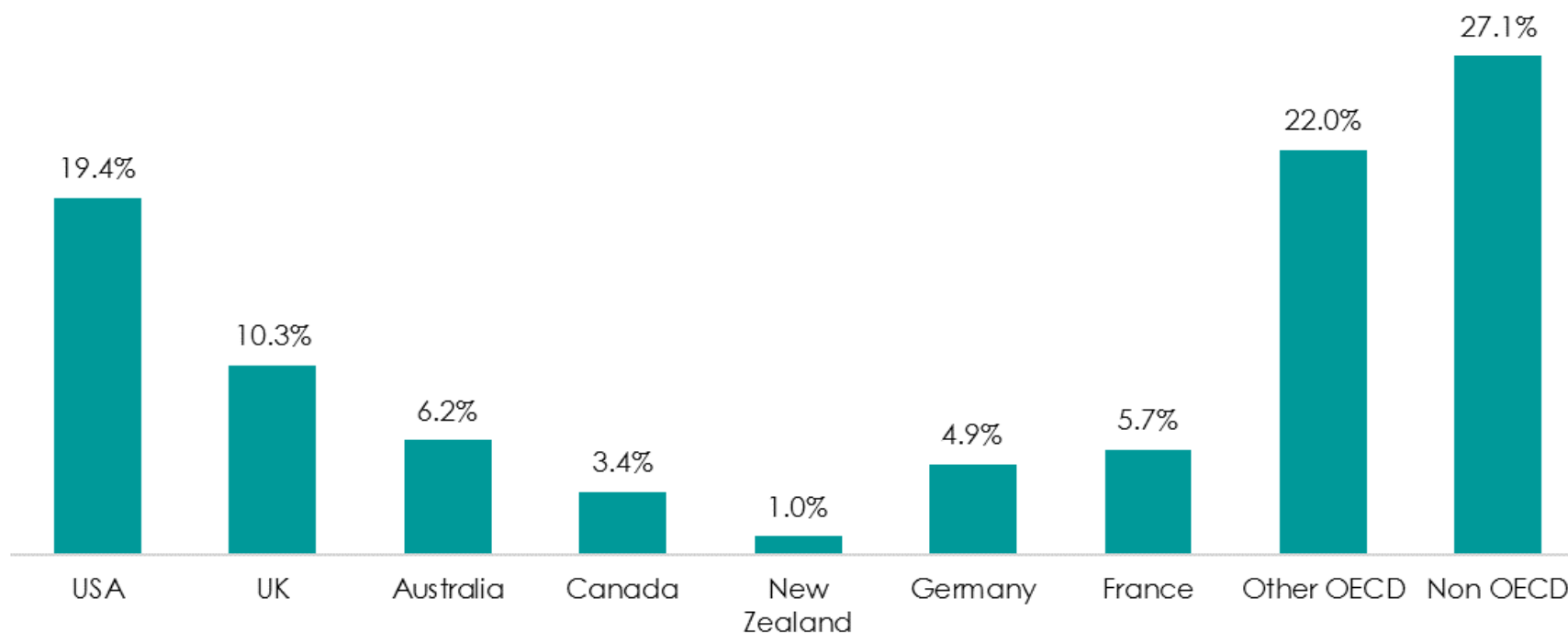


# Global growth



# Distribution of foreign students

Distribution of foreign students in tertiary education by country of destination, 2013



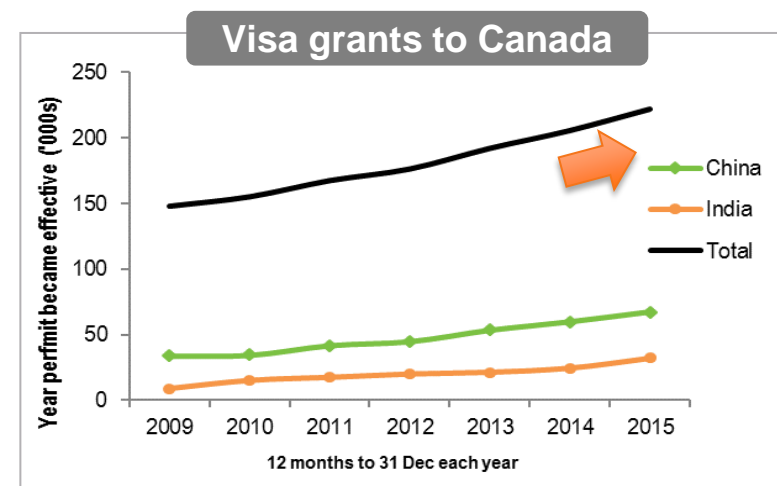
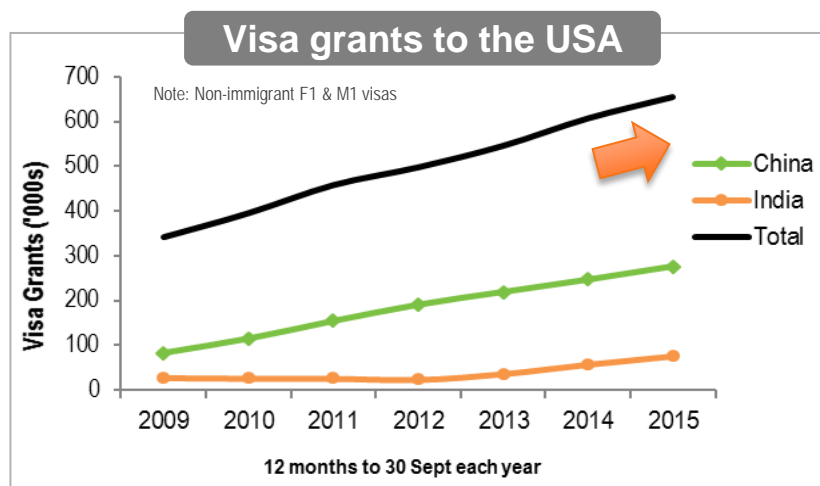
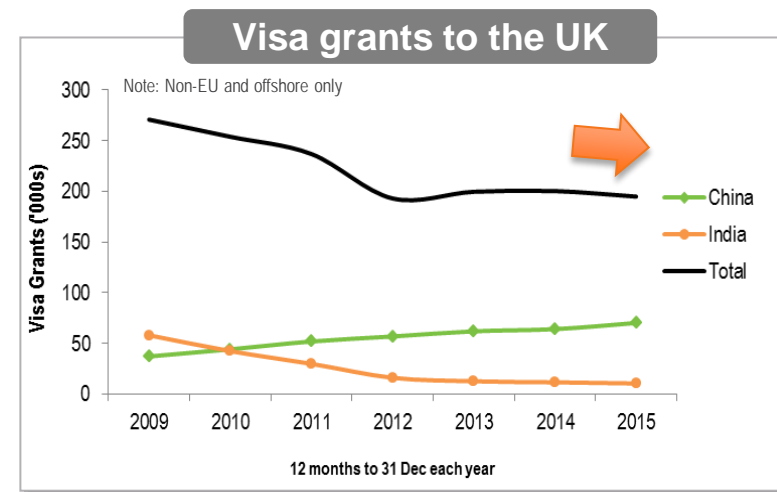
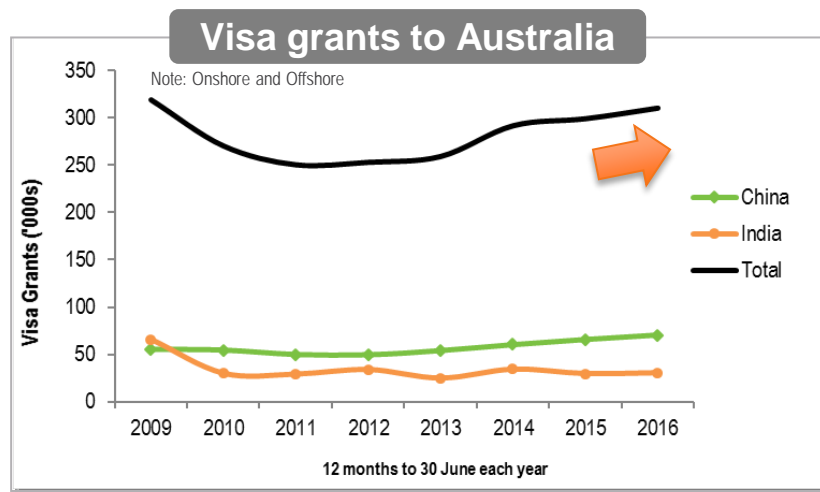
OECD (2015), *Education at a Glance 2015: OECD Indicators*, Table C4.6

# Competitor destinations and targets

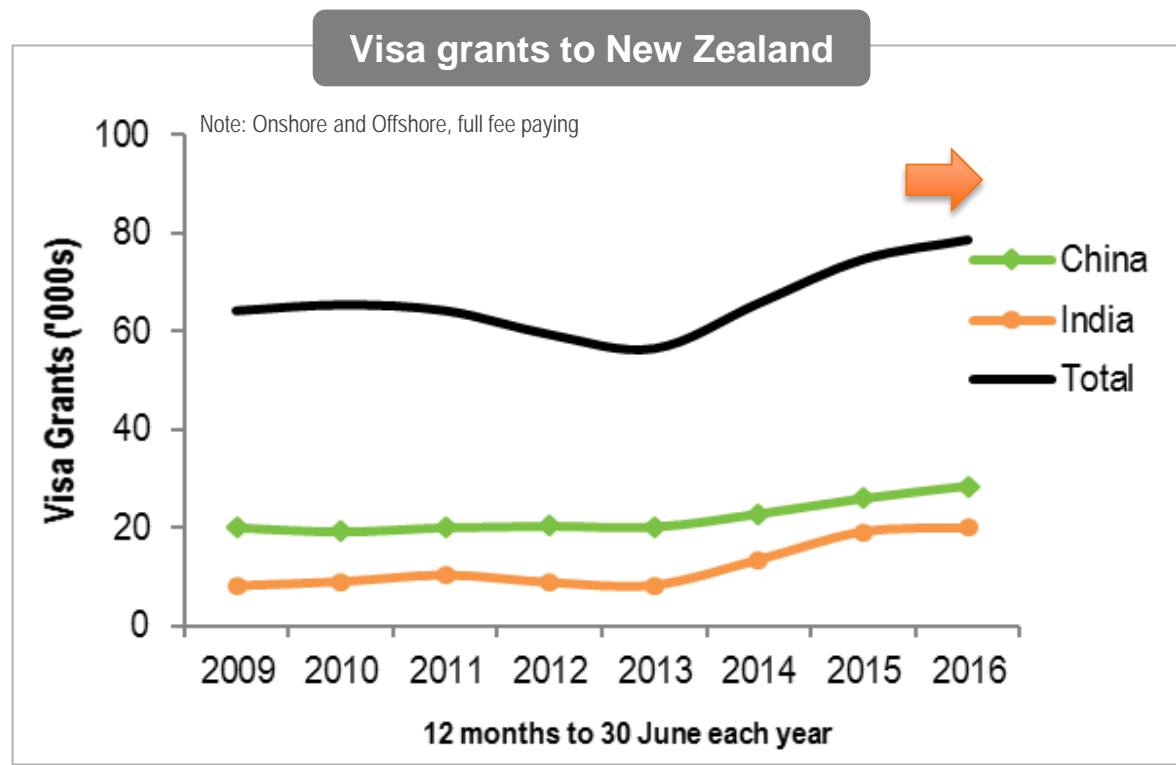
Country	Target	Year
Australia	Double number of international students	2025
NZ	Double economic value to \$5b	2025
Canada	Double number of international students to 450k	2022
China	Attract 500k international students (150k HE)	2020
Japan	Double number of foreign students to 300k	2020
Malaysia	Attract 250k international students	2025
Taiwan	Attract 150k foreign students	2020
UK	Increase non-EU enrolments by 55,000 additional students	2020
Germany	Attract 350k international students	2020
France	Increase foreign HE enrolments to 20% of total enrolments (approx 70k)	2025
Turkey	Host 200k international students	2023
Ireland	Increase foreign student enrolment in HE by 33% and ELT by 25%	2020

Sources: Education Target Reports from each Government - New Zealand, Canada, China, Japan, Malaysia, Taiwan and Ireland. Australia – Educating Globally report, UK - The Autumn Report 2015, Germany – DAAD's Strategy 2020, France - Minister of Higher Education, Turkish Prime Ministry's International Students Department

# Four key English speaking destinations

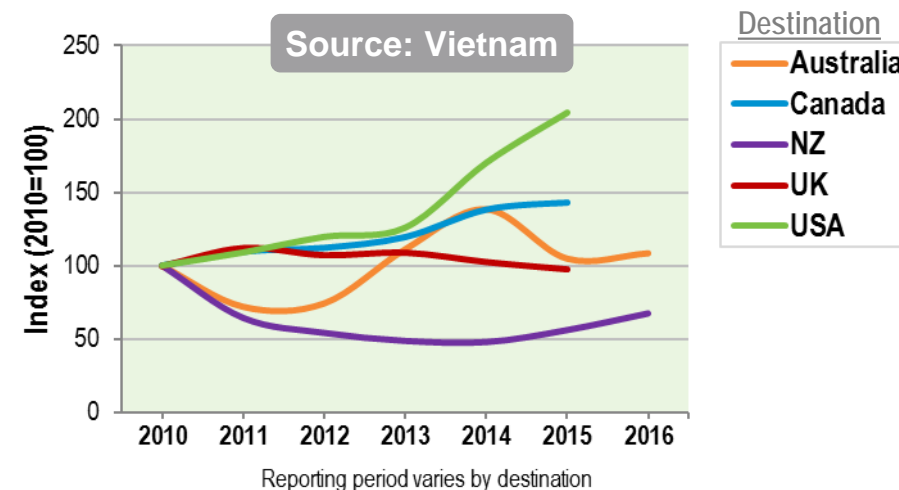
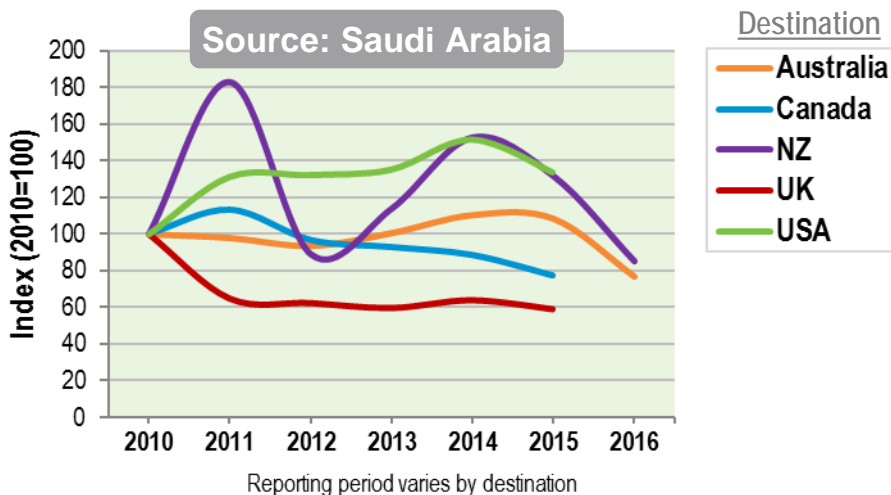
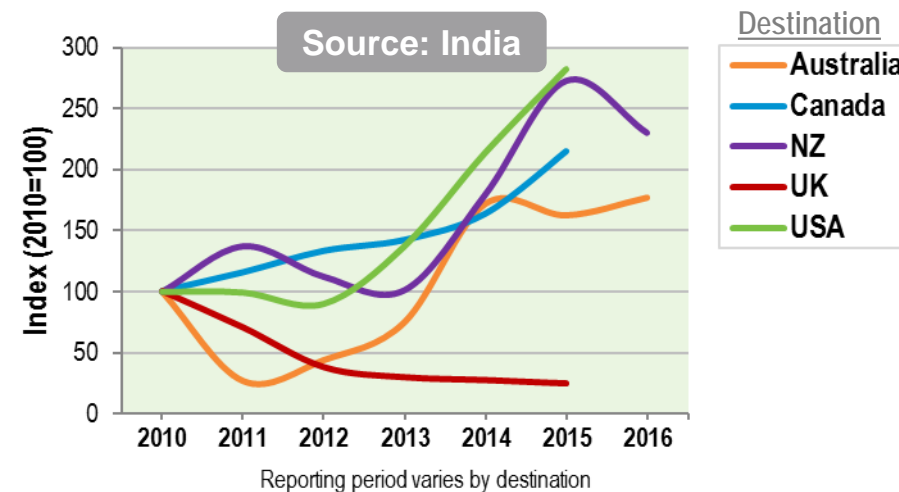
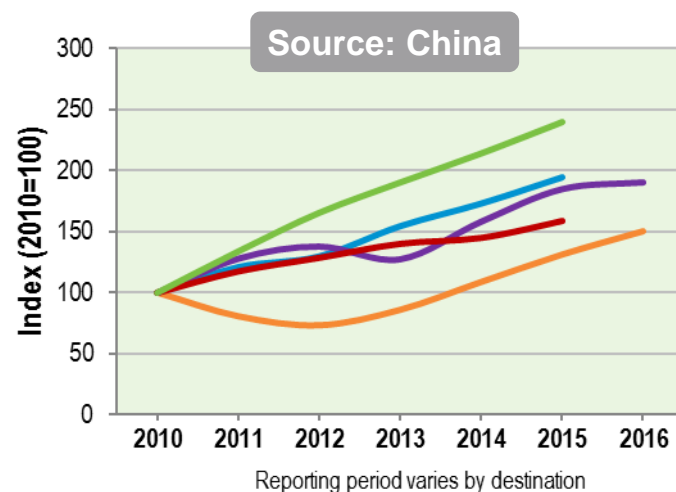


But we shouldn't forget...



Sources: Australia DIBP, Canada CIC, NZ Immigration, UK Home Office, US Dept. of State  
Slide developed by Lyndell Jacka, IDP Education

# Visa grants growth: some key source markets

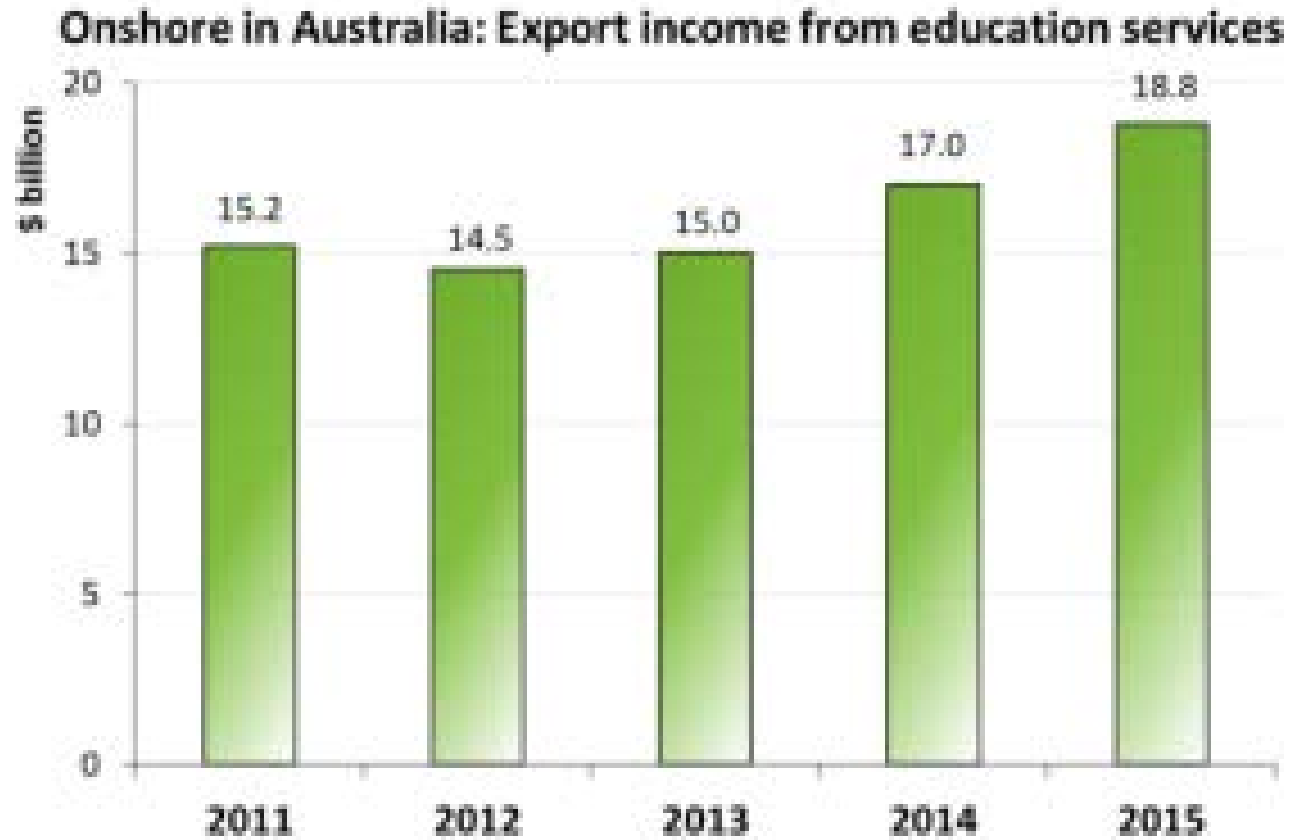


*Note: Data based on Australia/NZ – offshore only, UK – offshore, non-EU only, Canada and US – total*

Sources: Australia DIBP, Canada CIC, NZ Immigration, UK Home Office, US Dept. of State

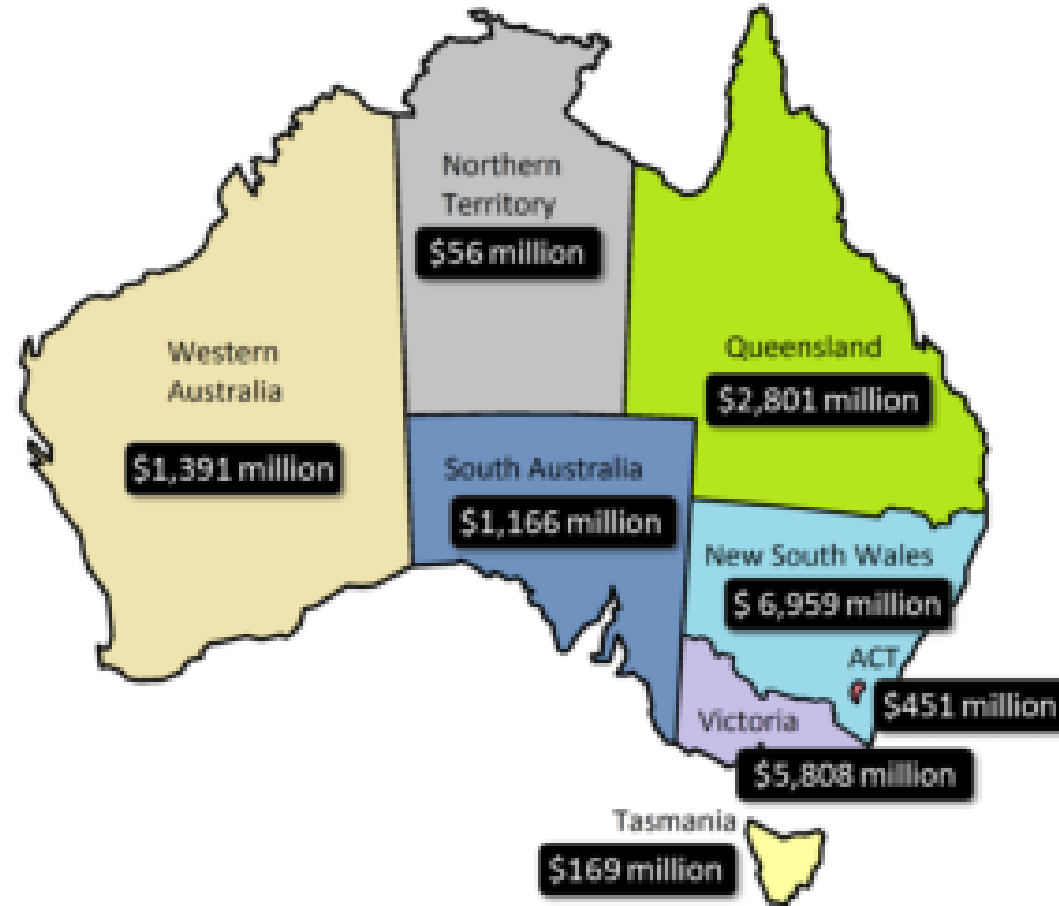
Slide developed by Lyndell Jacka, IDP Education

# Export income: onshore



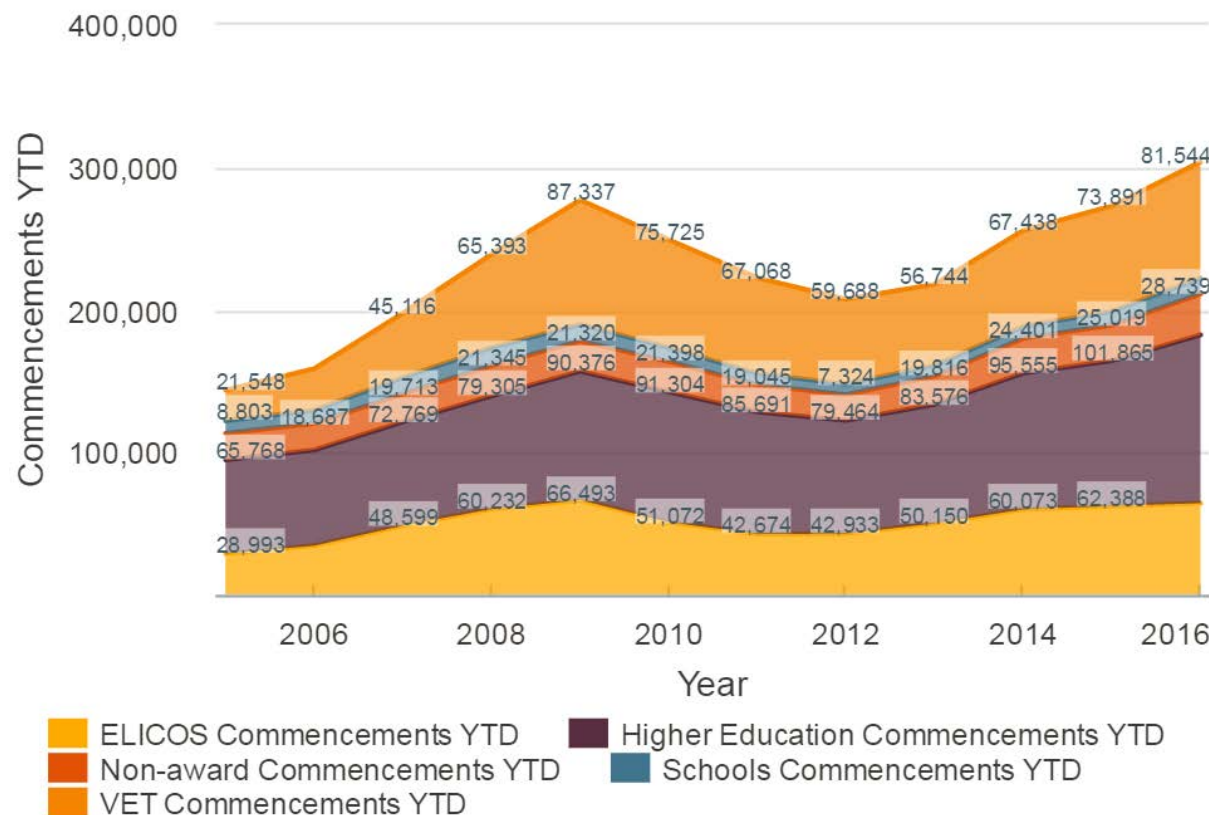
*Research Snapshot, Australian Department of Education and Training, June 2016*

# Export income by state and territory, 2015



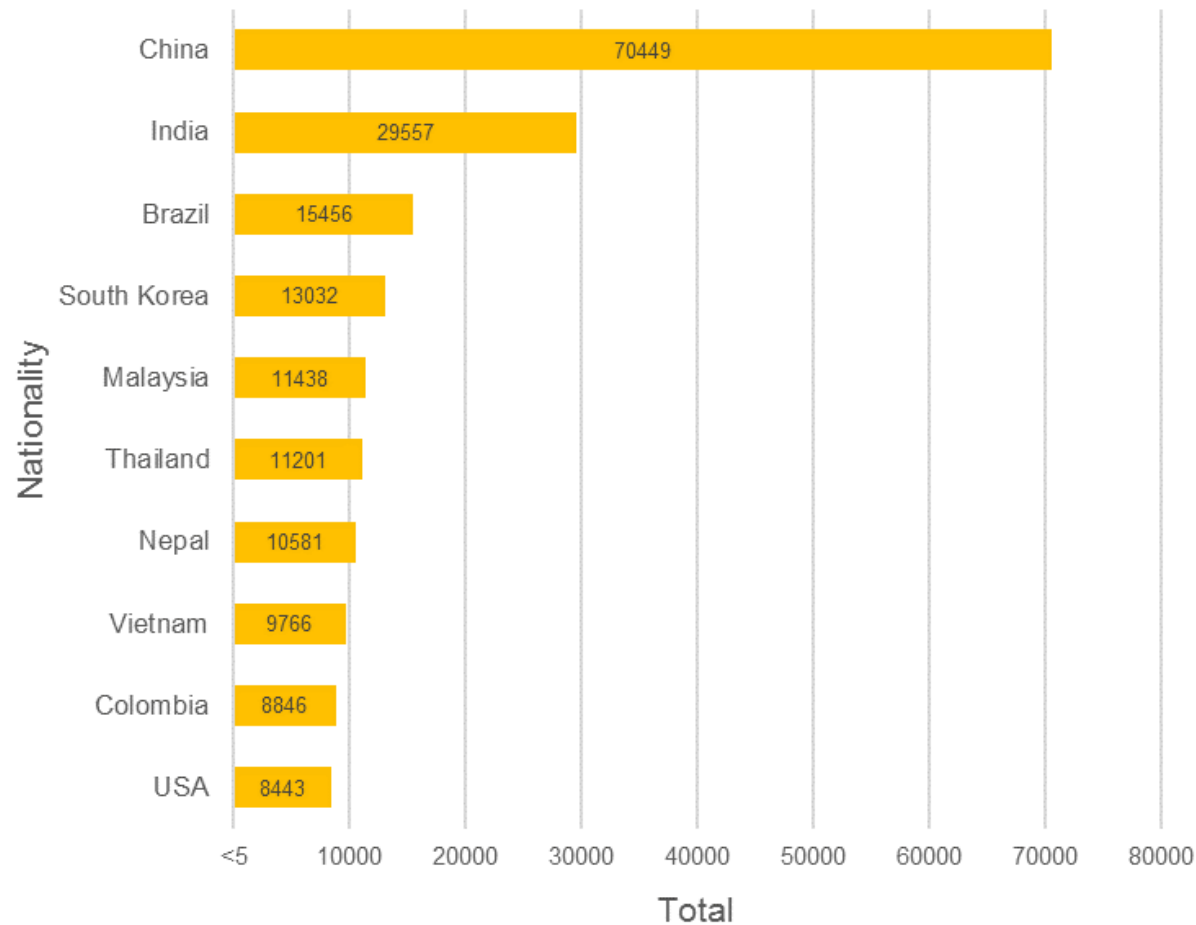


# Australia's commencement trends (YTD, July 2016)



Australian Department of Education and Training, YTD July 2016  
Courtesy: Austrade's Market Information Package

# Australia's top markets (visa grants)



Source: Department of Immigration and Border Protection (excluding DFAT and Defence visa grants)  
Filtered by: FY2016. Nationality  
All, and Sector All

DIBP, FY ending June 2016  
Courtesy: Austrade's Market Information Package

# Year-to-date commencements

All sectors by top 10 nationalities (State/Territory)

NATIONALITY	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	TOTAL
China	32,022	27,276	10,020	5,638	2,774	975	86	3,268	82,059
India	7,343	12,753	4,511	1,401	3,974	227	102	259	30,570
South Korea	6,217	2,417	3,022	426	1,019	117	15	236	13,469
Thailand	8,334	3,040	1,191	134	448	40	31	86	13,304
Vietnam	4,364	5,610	996	731	1,099	74	37	163	13,074
Brazil	6,026	1,430	3,580	394	1,412	26	2	25	12,895
Malaysia	2,220	5,608	1,141	683	1,557	312	9	128	11,658
Nepal	5,579	1,407	785	353	451	67	179	25	8,846
Colombia	2,259	2,909	2,084	106	621	8	6	22	8,015
Indonesia	4,651	2,106	392	136	507	11	46	123	7,972
Other	36,377	26,145	21,186	4,358	10,942	785	452	1,704	101,949
TOTAL	115,392	90,701	48,908	14,360	24,804	2,642	965	6,039	303,811

# Austrade 2020 forecast

Nationality	2002	Rank	2013	Rank		2020 Forecast	Rank
China	44,570	1	150,116	1		China	1
India	10,974	10	49,265	2		India	2
South Korea	17,348	4	27,580	3		Pakistan	3
Vietnam	3,828	13	26,015	4		Philippines	4
Thailand	14,280	7	21,762	5		Indonesia	5
Malaysia	17,177	5	21,208	6		Vietnam	6
Brazil	3,819	14	17,554	7		Brazil	7
Indonesia	19,864	2	17,131	8		Bangladesh	8
Nepal	1,446	26	14,351	9		Saudi Arabia	9
Pakistan	1,680	25	12,869	10		South Korea	10
Colombia	2,182	21	12,030	11		Thailand	11
Japan	15,794	6	11,595	12		Colombia	12
Saudi Arabia	115	73	10,352	13		Nigeria	13
USA	10,987	9	9,469	14		Mexico	14
Philippines	948	32	8,830	15		Kenya	15
Other	90,924		116,805				
Total	255,936		526,932				



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## QUESTION TIME





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## PART 2: THE POLITICAL CONTEXT



# The politics of international education in Australia

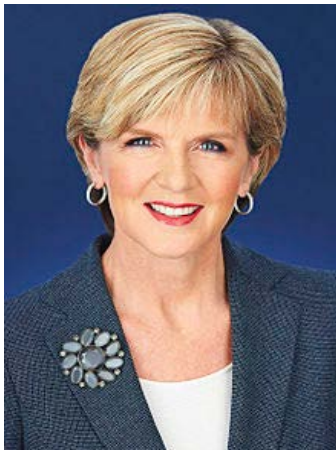
**aieec**  
2016 Melbourne



**Senator the Hon Simon Birmingham**

Minister for Education & Training

*Builds on his background in the training portfolio*



**The Hon Julie Bishop MP**

Minister for Foreign Affairs

*New Colombo Plan*

# The politics of international education in Australia



## The Hon Steven Ciobo MP

Minister for Trade, Tourism & Investment

*Austrade's 2025 International Education Strategy*

*Marketing and brand strategy*



# The politics of international education in Australia

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**The Hon Greg Hunt MP**

Minister for Industry, Innovation and Science



**Hon. Peter Dutton MP**

Minister for Immigration and Border Protection

# Industry peak bodies

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2016 Melbourne



  #aieec2016

- National Strategy for International Education
  1. Strengthening the fundamentals
  2. Making transformative partnerships
  3. Competing globally

- Australian International Education 2025 (AIE2025)
  - Aims to maximise the sector's contribution to Australia's economy, society and international standing
  - Ambitious targets of:
    - 1 million inbound students
    - 10 million students offshore – “Borderless”
- DFAT's Global Alumni Strategy
- National Innovation and Science Agenda

- International Education sector strategy – Business Victoria (2016)
  - Links to wider development and business strategies “integrated”
  - Community engagement
  - Grow the numbers
- Queensland international Education Strategy (2016 to be released)
  - Focus on the regions and student experience
  - Increase market share
- StudyNSW International Education Strategy (2016)
  - International student experience and growing numbers
  - Support for offshore and “technology enabled” delivery
- Destination Adelaide – SA International Education Strategy (2015)
  - Student Growth & experience
- Other states and territories highly active with recent strategies or strategies under way.

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# Increasing the value of international education



The value might be measured by:

- Collaborative research output
- Top 3 student destination country
- Overall economic contribution
- Number of Australians who benefit (e.g. employed in sector, outbound students)
- Brand recognition
- Digital delivery measurement
- Market share metric

- Is there a desirable upper limit for an institution's international student ratio?
- Do we allow overseas institutions to build, own and operate primarily international student only campuses?
- How is Australia perceived in the source markets?
  - Contributing to the brain-drain
  - Talking too much about economic value
- Are we delivering on student/parent expectations?
  - Careers
  - Migration
  - Recognition



# Legalisation and policies



- Educational Services for Overseas Student (ESOS) Act
- National Code
- Migration Act
- State legislation
- Institutional policies and procedures

Two main mechanisms regulate international education:

- **ESOS framework**  
Legislation and standards placing obligations on education providers for overseas students (student visa holders)
- **Quality Assurance**  
Registration, accreditation and ongoing monitoring of courses and providers

# Aim of the ESOS framework



- Protect and enhance Australia's reputation for quality education and training services
- Protect the interests of international students by:
  - Standards, roles and responsibilities for education institutions that teach overseas/international students
  - Ensuring they receive the tuition for which they have paid and, if provider collapse, they receive either alternative tuition or refund
- Support the integrity of Australia's migration program

# Recent changes to ESOS



- Removal of study period requirements
- Reporting student defaults and refunds
- Flexibility in paying tuition fees upfront

<https://internationaleducation.gov.au/Regulatory-Information/Pages/Recent-changes-to-ESOS.aspx>

# Quality assurance



- Tertiary Education Quality and Standards Agency (TEQSA)
- Australian Skills Quality Authority (ASQA)

## Commonwealth responsibilities

- Administration of ESOS Act 2001 and National Code 2007
- CRICOS registration
- Operation of quality assurance frameworks
- Australian Qualifications Framework (AQF)

Streamlined Student Visa Processing to Simplified Student Visa Framework from July 2016

- All providers under one framework
- From eight to two visa subclasses
- Simple, single immigration risk framework

		Country risk rating		
		1	2	3
Institution risk rating	1	S	S	S
	2	S	S	R
	3	S	R	R

## SVP to SSVF

- Risk ratings will be updated every 6 months
- No need to opt-in
- No need to nominate education business partners
- Education providers who enrol under 50 active eCOEs assigned a rating of 5
- Risk rating is attached to the eCOE held at the time the student visa application was decided

# Post-Study Work Rights (PSW)



- Commenced 23 March 2013
- New stream of the Temporary Graduate (subclass 485) Visa
- Two to four years duration, depending on study level
- No link to skilled migration program
- Completed 2 years of academic study, in no less than 16 calendar months
- Applicants must:
  - apply in Australia
  - have recognised English language proficiency
  - apply for the visa within 6 months of completing the qualification



# Rankings, ratings and kite marks

- The Academic Ranking of World Universities
- The Quacquarelli Symonds (QS) World University Rankings
- The Times Higher Education World University Rankings
- ERA ratings
- MBA rankings and accreditations
- Subject rankings and accreditation
- Student satisfaction (ISB) / Employment outcomes (QILT)

- International Student Experience
  - Diversity
  - Accommodation
  - Acceptance within Australia
  - Online vs face-to-face
- Graduate Employability
  - Quality Indicators of Learning and Teaching (QILT)
  - AUIDF International Graduate Outcomes survey (2016)
- Brand Australia
  - Austrade is insufficiently funded for international education
  - Are States and Territories pulling in different directions?
  - Seen as money grabbing and one direction (overly commercial?)

- Australian Government stability
  - What happens if there is another change in the current government or an election?
  - Will migration including international students be an election topic – is PSW sustainable?
- Global Competition
  - Within Australia
  - From other destination markets
  - Rapidly improving education systems within source markets
- Market volatility
  - Political – Economic – Social – Technical – Legal – Environmental
    - What might the Brexit and Trump affect be?



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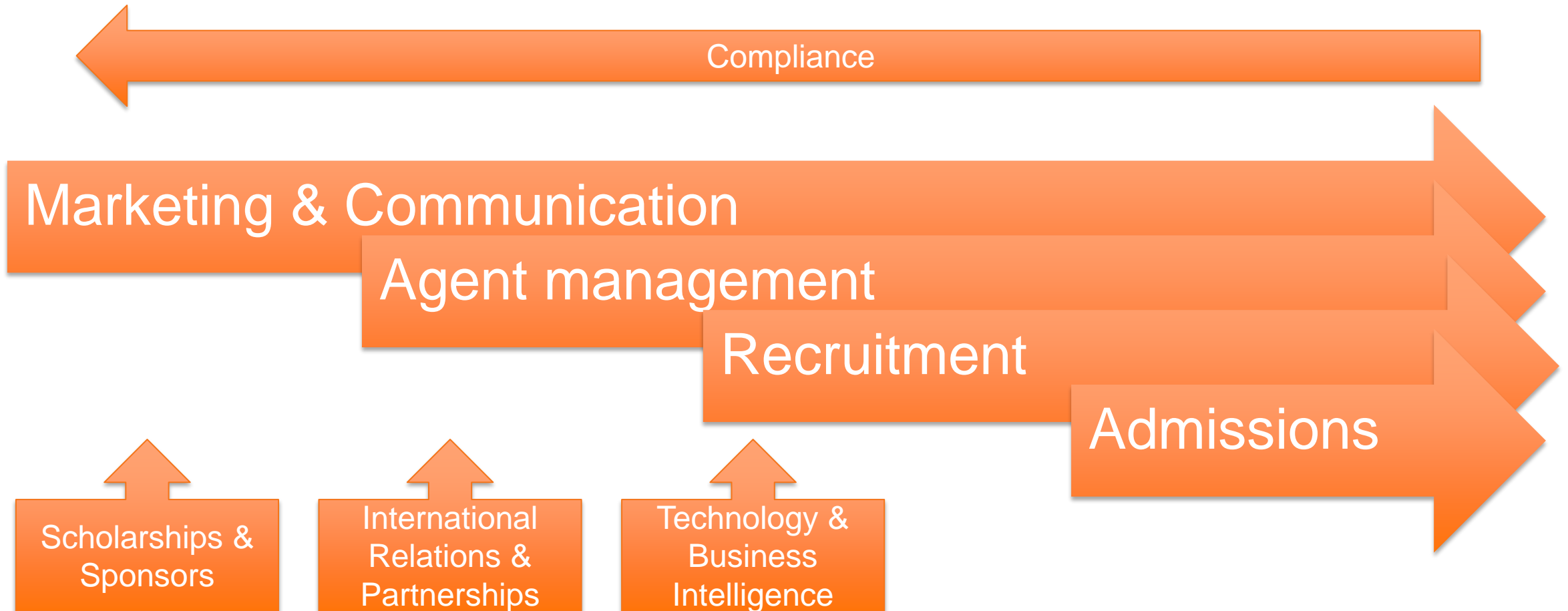
## PART 3: INTERNATIONAL FUNCTIONS



# International functions



- Marketing and communications
- Recruitment
- Admissions
- Transnational education (TNE) – online education / face-to-face
- Mobility
- Scholarships
- International relations & partnerships
- Student support
- Compliance
- International research & rankings



# Marketing and communications

- Brand and the brand assets
- Institutional website
- Course guides
- Orientation guides
- Virtual campus tours
- Apps
- Facebook, Twitter and Instagram etc
- eDMs
- Translated content
- Advertising – print and digital

Increasing realisation by  
sector that CRM is  
important!?!



- Identification of markets
- Market specific strategy
  - What is the recruitment lead time?
  - What are your channels?
  - Traditional vs digital recruitment
    - (e.g. virtual fairs)
- Outsourcing
  - Enquiries
  - Admissions
  - Conversions
  - Retention

- Identification and evaluation
- Contractual arrangements
  - Legal requirements
  - Institutional requirements
  - Financial incentives
- Onboarding and training
- Communication strategy
  - Visits
  - Agent portal
  - Newsletters
  - Skype training
- Evaluation
  - Renewal
  - Termination

- 3 key roles:
  - **Academic:** assess equivalence using NOOSR and UK NARIC guidelines
  - **English language proficiency:** IELTS, TOEFL, PTE, Cambridge or institutional test
  - **Genuineness:** nationality, hometown, age, marital status, gaps in study, career path, likelihood of returning
- How it works & aspects:
  - Delegated authority
  - Faculty/college/dept. decisions
  - Pathways/credit/advanced standing
  - Full offers vs conditional offers
  - Under 18s

# Role of scholarships and sponsors

- Federal Government includes:
  - Australia Awards [www.australiaawards.gov.au](http://www.australiaawards.gov.au)
  - International Postgraduate Research Scholarships (IPRS)
- State Government scholarships
- Institutional scholarships
  
- Foreign government scholarships:
  - Indonesia
  - Kuwait
  - Saudi Arabia
  - UAE
  - Vietnam
  - Malaysia
- Private Scholarships and Sponsorships

# Role of international partnerships



Channels students come through – can lead to more than recruitment (international relations)

- Pathway programs
- Articulations
- Dual degrees
- Joint research projects / *cotutelle*

Before we talk about marketing and recruitment, what does the research tell us:

- Rob Lawrence
  - Pre-disposition is now at city level, rather than country
- Hobsons' Beyond the Data: Influencing international student decision making (May 2014)
  - Course, then country, then institution
  - Subject/course rankings over institution rankings
  - Clear brand proposition for each course
  - Fees are 2<sup>nd</sup> most important factor
  - Student satisfaction not as important as graduate outcomes
  - Institutional efforts raise the country brand, country marketing efforts reinforce sense of welcome and safety

# Role of data and importance of CRM



- Data sources:
  - International
  - National
  - State
  - Institutional data sources
- Benchmarking surveys:
  - Recruitment costs by country, channel and course
  - Institutional resourcing
- Improving conversion
- Putting your data back into the messaging and utilising technology to help the consumer through their decision making journey

- Manage institutional agreements with foreign governments or institutions
- Coordinate inward visits by foreign governments and institutions
- Develop and maintain protocols and processes for inward delegation visit
- Support visits to international partners, including assisting with briefing notes, protocols and logistics
- Monitor and report on foreign government policy and initiatives
  
- International research connections
  - Joint publications – citation index
  - Impacts on rankings



# Student mobility



- Inbound, outbound and virtual
- Exchange vs Study Abroad
- Student and staff exchange
- Study tours, short-term and/or faculty/dept. led
- Research
- Internships, placements or practical training
- Volunteering
- Island programs

- Significant growth in outbound mobility, in 2014:
  - 31,846 students in Australian institutions studying abroad
  - Around 16.5% of completing undergraduates have a mobility experience 2015
    - Approaching 19% in 2016, data to be verified
  - 50% going to Asia
- Strong support from government and institutions
- Mobility is attractive to prospective students and employers, and enhances student experience
- Broadening beyond exchange into short-term mobility and work placements abroad

# Student mobility funding



- New Colombo Plan
  - \$100m over 5 years to support undergraduates to Indo Pacific
  - Scholarship Program – circa 100 students in 2016
  - Mobility Program – circa 5,500 students in 2016
- Endeavour Mobility (& Cheung Kong)
  - Global program to support VET, UG and PGC (UG is Non-Indo-Pacific only)
  - Multiple programs
- OS-Help
  - Loans of up to: \$6,362 for non-Asia - \$7,635 for Asia - \$1,018 for Asian language study
- State, private and institutional funding
- Self funded – short term

## Student benefits

- Greater international outlook and intercultural understanding
  - Improved academic performance and retention
  - Improved employability
  - Languages and “Asia literacy”
- 
- **Institutional benefits**
  - Internationalisation of the educational experience
  - Soft-power? Diplomacy? Impact on International Relations
  - Global branding and ambassadors

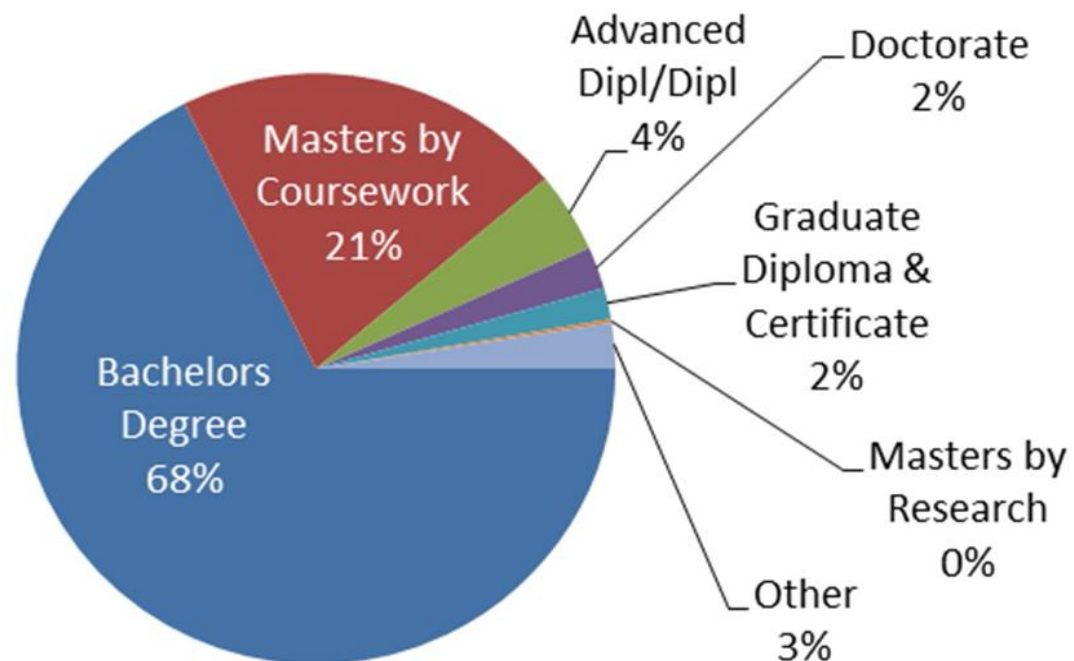
# Transnational education (TNE): important or not?

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>
<b>Grand Total</b>	<b>323,612</b>	<b>328,402</b>	<b>347,560</b>	<b>1.5%</b>	<b>5.8%</b>

*Research Snapshot: Transnational education in the higher education sector, Australian Education International, September 2015*

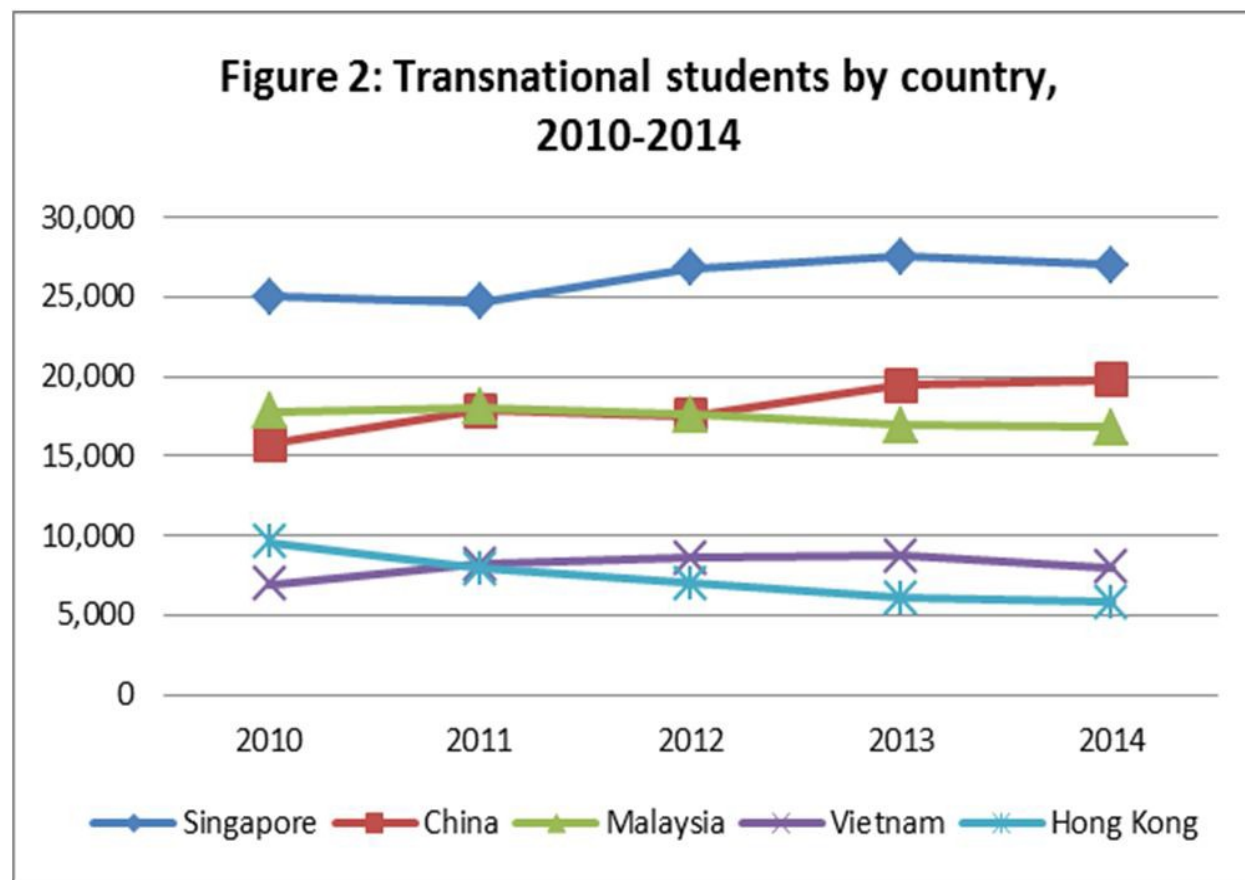
# TNE levels of study

**Figure 1: Transnational students by level of study, 2014**



*Research Snapshot: Transnational education in the higher education sector,*  
Australian Education International, September 2015

# TNE enrolments by country



*Research Snapshot: Transnational education in the higher education sector,*  
Australian Education International, September 2015

# Transnational education (TNE)



- Diversification of modes of program delivery:
  - Pathways (foundation, diplomas)
  - Mobility between locations
  - Joint masters
  - Joint doctorates
- Major focus on non-award transnational education:
  - Web and app-based online learning, e.g. 3P Learning has over 4.8 million users globally
  - MOOCs
  - Short courses
  - Workplace training



- Tailored support for international students
- May refer to specialist services
- Orientation and welcome programs
- Working to integrate international and domestic students
- Focus of support may include: safety (personal, fire, water), physical and mental health, cultural adjustment
- ISANA: International Education Association
- Council of International Students Australia
  - I'm not Australian, but I have an Australian story*
  - campaign [www.youtube.com/user/CISATV](http://www.youtube.com/user/CISATV)
- Support state govt. initiatives – Premier's welcome receptions, airport welcome desks, student centres

- Manage the institution's compliance with the regulatory frameworks
- Experts in interpreting the National Code
- Case management
- Involved in actioning or issuing:
  - eCOE extensions
  - Reduced study loads
  - Intermission requests
  - Discontinuations
  - Change of visa status
  - Statements of completion
  - Releases
  - Unsatisfactory attendance for ELICOS students
  - Provider default
  - Student default inc. non-commencement



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## QUESTION TIME



# IEAA special interest groups (SIGs)

- Admissions & Compliance
- Internationalisation of the curriculum
- Marketing, Recruitment & Communication
- Pathways
- Sponsored Students
- Student Mobility
- Transnational Education

[www.ieaa.org.au/special-interest-groups/](http://www.ieaa.org.au/special-interest-groups/)

## DATA

Austrade's Market Information Package (MIP) Orbis:

<https://www.austrade.gov.au/australian/education/education-data/mip-orbis>

Data visualisation tool

- Data and Research, Australian Department of Education and Training:  
[internationaleducation.gov.au/research](http://internationaleducation.gov.au/research)

## NEWSLETTER SUBSCRIPTIONS

- ICEF Monitor: [monitor.icef.com](http://monitor.icef.com)
- International Education Update (PIER): [pieronline.org](http://pieronline.org)
- The PIE News: [thepienews.com](http://thepienews.com)
- University World News: [universityworldnews.com](http://universityworldnews.com)
- Bob Johnson Consulting: <http://www.bobjohnsonconsulting.com/>

## OTHER

- IEAA website & SIGs: [www.ieaa.org.au](http://www.ieaa.org.au)
- British Council Education Intelligence: <https://ei.britishcouncil.org/>

# Resources: Twitter

@LowyInstitute  
@HigherEdIQ  
@THEworldunirank  
@CampusReview  
@ConversationEDU  
@Navitas  
@ACPET\_national  
@HobsonsAPAC  
@igraduate  
@icefmonitor  
@uniworldnews  
@IIEglobal

@IEAAustralia  
@Austrade\_Ed  
@FutureUnlimited  
@BritishCouncil  
@eduintelligence  
@EducationUK  
@chinaeducations  
@IDPRIE  
@timeshighered  
@insidehighered  
@ThePIENews  
@DrEducationBlog  
@HighEdMarketing



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THANK YOU

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