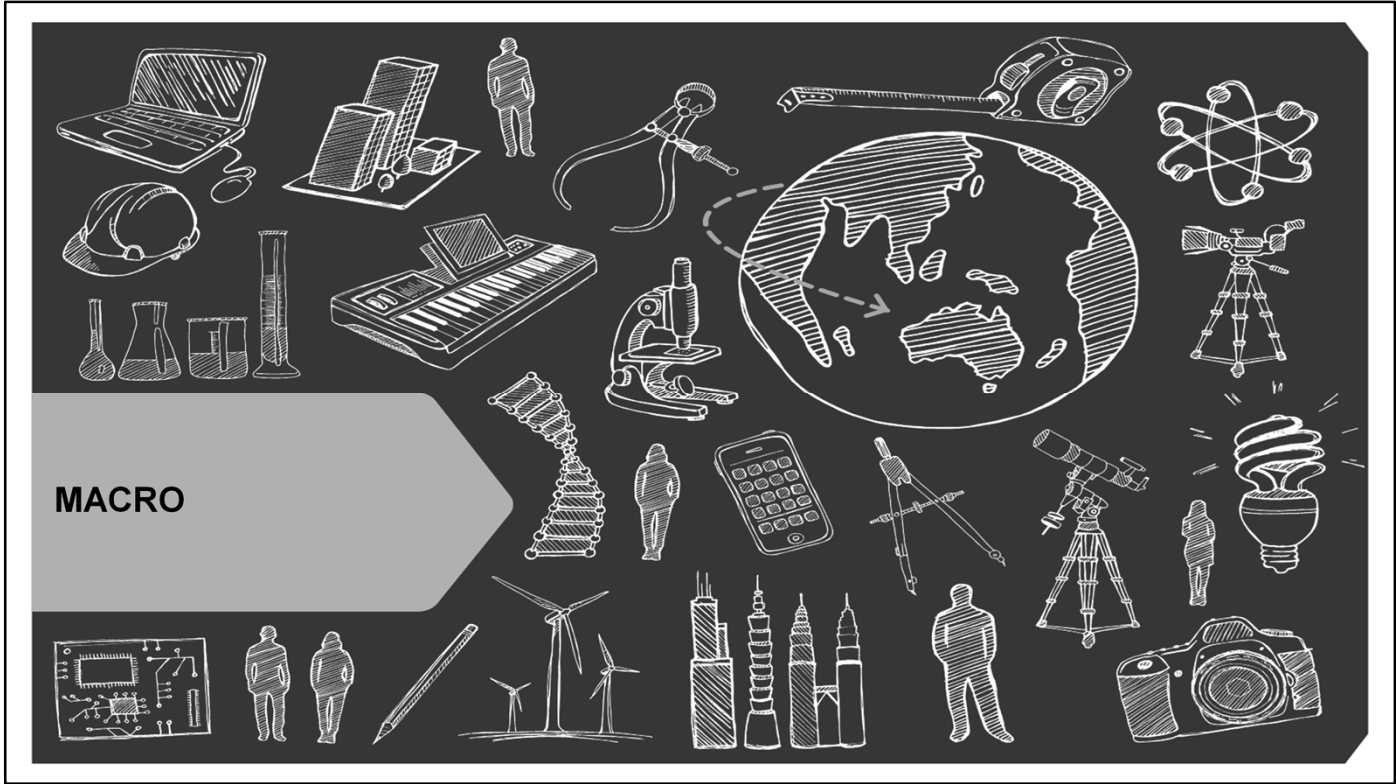


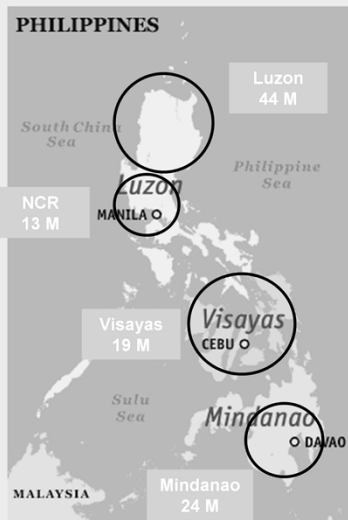
In Focus: Philippines

Tracy Harris, ASEAN Education Commissioner
AIEC, 19 October 2016





Philippines at a glance



One of Asia's fastest growing economy



Real GDP average growth 6.2% for past six years and low inflation rate.¹



Gaining global competitiveness and Investment upgrades



*107 million people spread across 7,000 islands

*CIA World Fact Book, as of July 2014



Private consumption accounts for more than 70% of economic growth²

The Filipino Middle Class

Ranked 2nd in the world's
MOST CONFIDENT
consumers
(Nielsen Global Consumer
Confidence Survey 2013)

18-20 million "real
consumers"
-US Gain report
June 2015



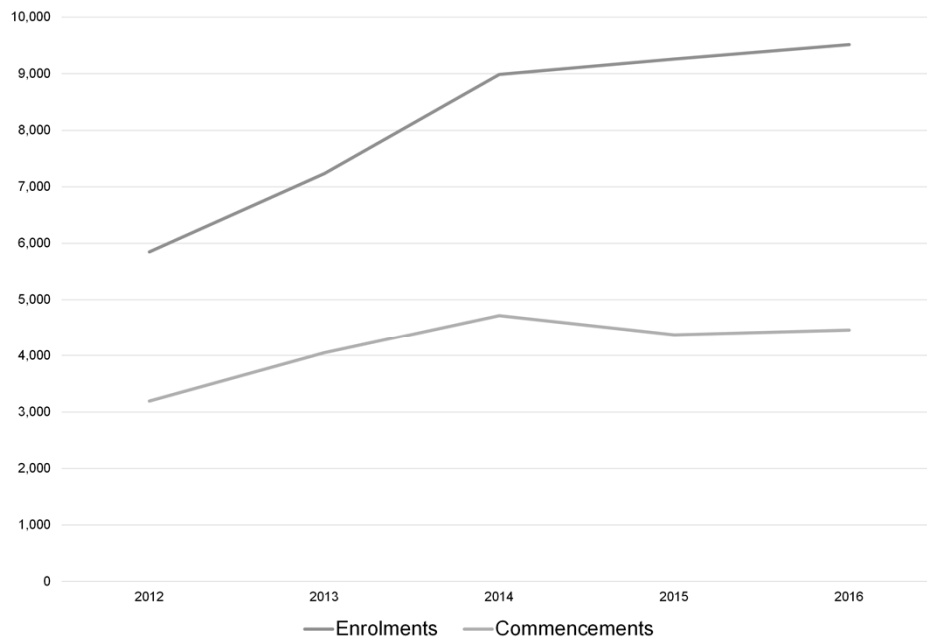
Population of
under 30's
expanding
single household with
upscale taste

YOUNG, ONLINE ASPIRATIONAL

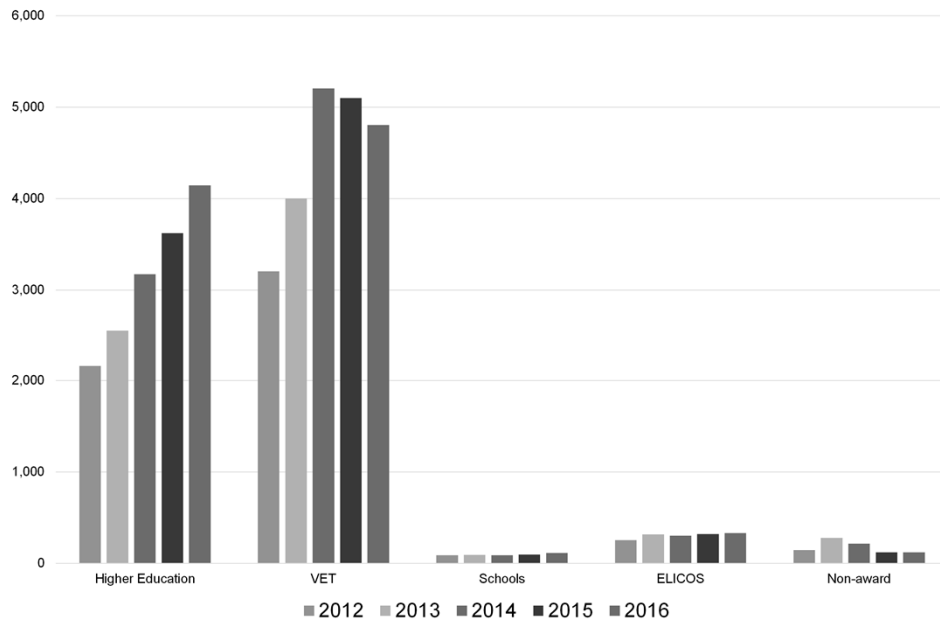
- ✓ ME Generation
- ✓ Tertiary educated
- ✓ Optimistic
- ✓ Receptive

In 2030: 80% of the Filipino population will belong to the middle class (ADB)

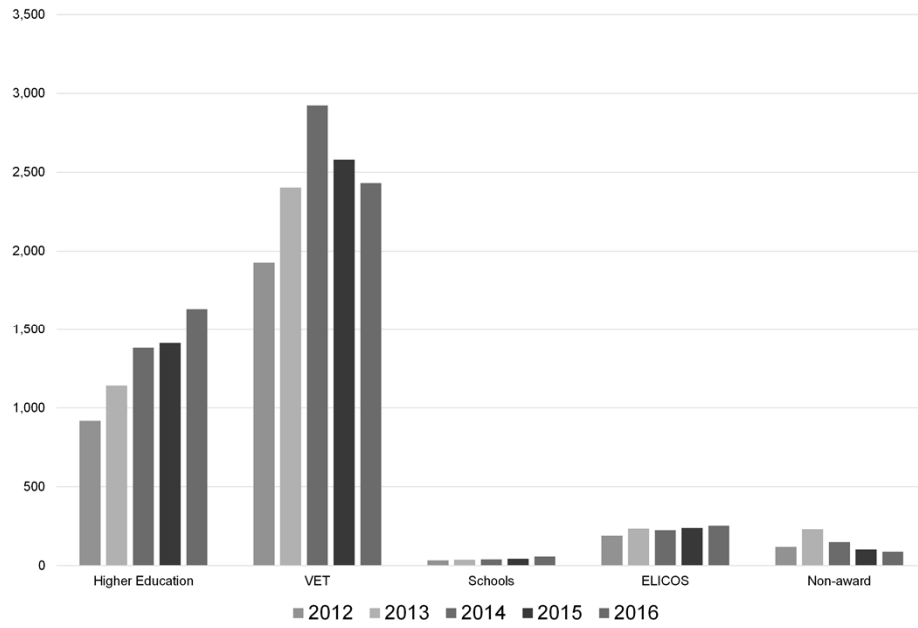
Enrolments and commencements, Philippines, 2012-2016 July YTD



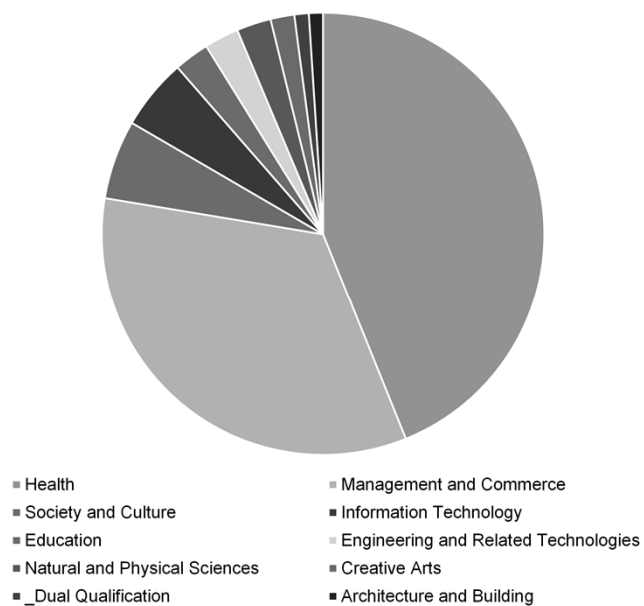
Enrolments by sector, Philippines, 2012-2016 July YTD



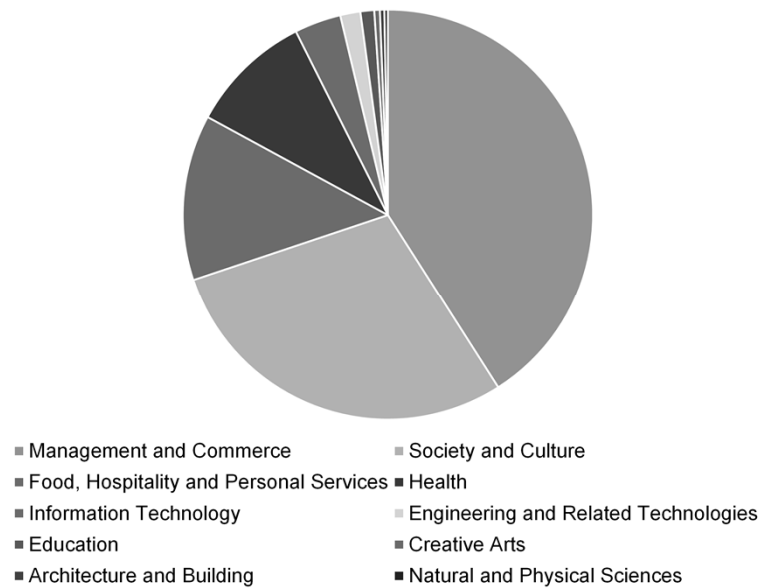
Commencements by sector, Philippines, 2012-2016 July YTD



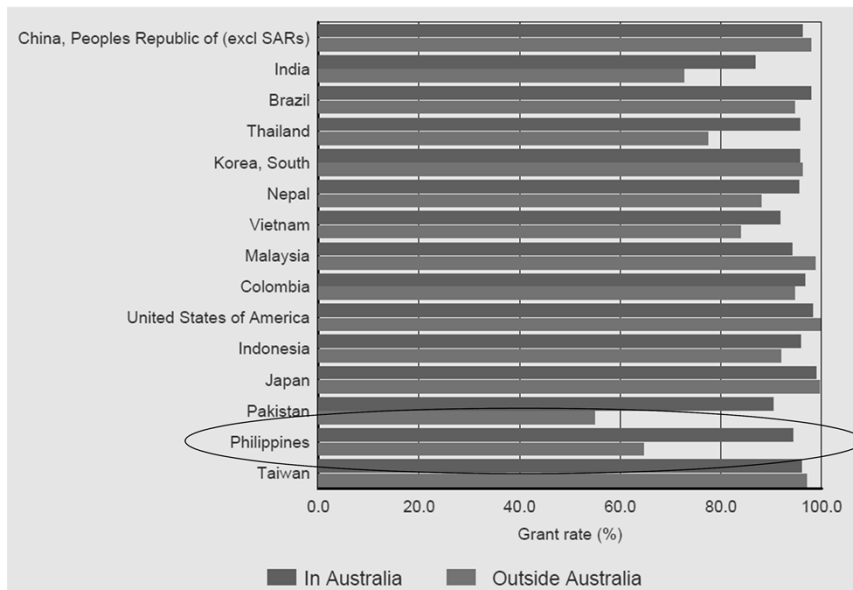
Higher education enrolments by broad field of study – top ten,
Philippines, July YTD 2016

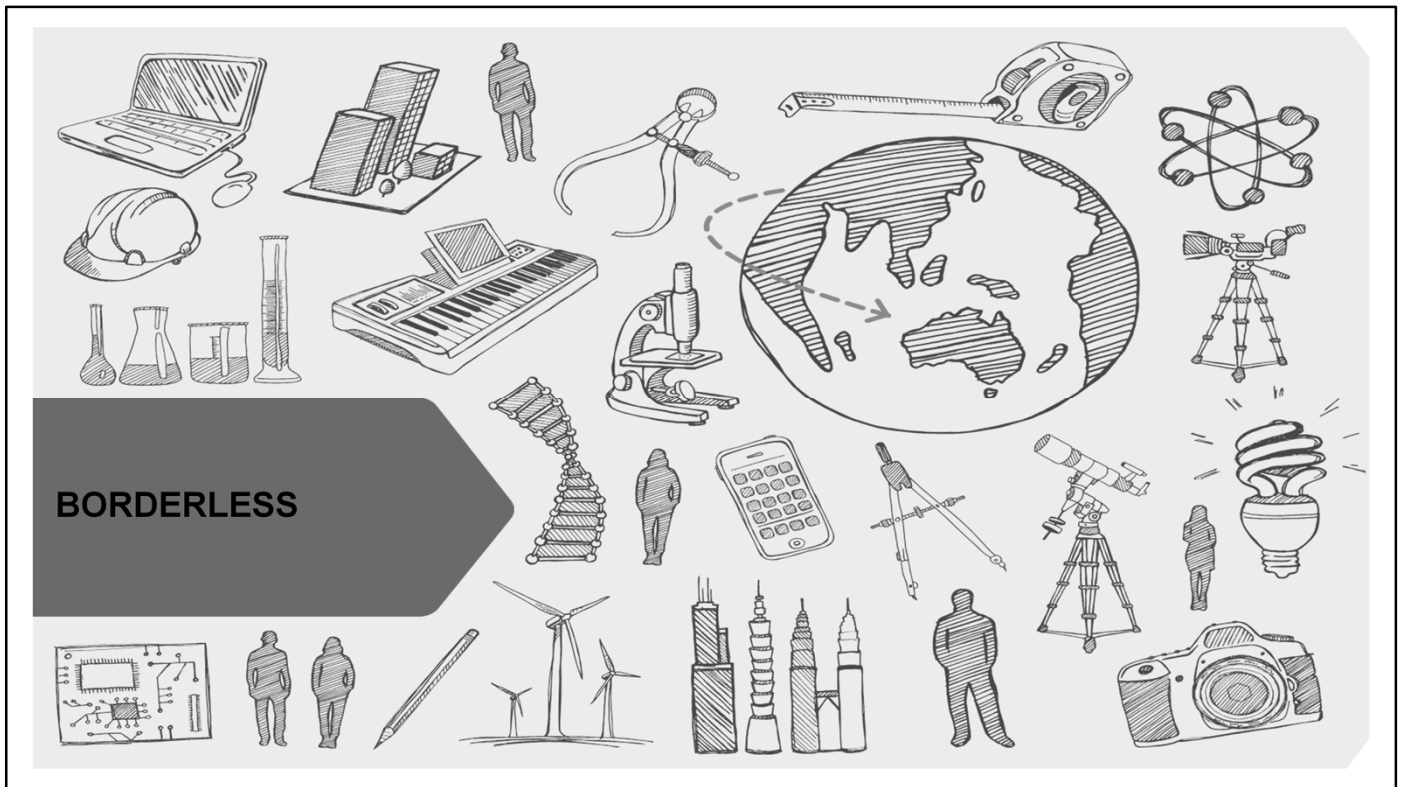


VET enrolments by broad field of study – top ten, Philippines,
July YTD 2016



Grant rate of student visa applications decided in the three month period between 1 April 2016 and 30 June 2016 by citizenship country and client location - top 15 citizenship countries





Australian programs



> 20 international education partnerships between Australian and Philippine providers

Opportunities

- International schools
- Program diversification
- Regional markets
- Borderless
- Teacher training
- Curriculum development

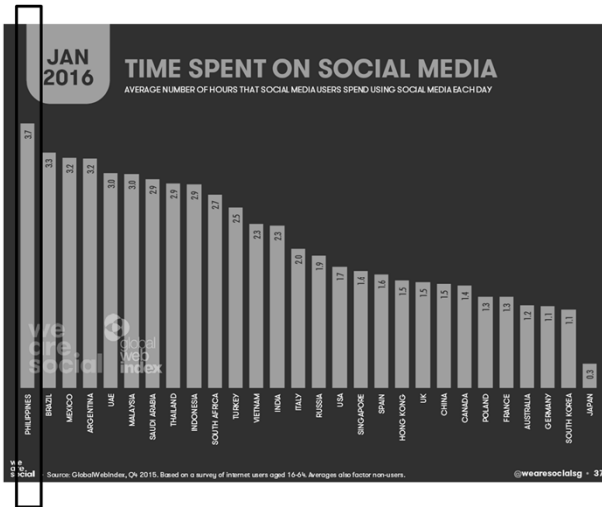
Challenges

- Growing student pipeline
- Increased competition
- Price sensitive
- Challenges with meeting student visa requirements
- Redtape from government and academic boards

What next?

Education/exhibition model more than 20 years old
Using the digital economy

Social media





ASIAN DEVELOPMENT BANK

- Aims to reduce poverty through sustainable development in Asia-Pacific
- Lending volume US\$12.92b (2014)
- Education is a key focus area
- Consulting opportunities through Technical Assistance projects
- ADB Business Opportunities
 - Fair (March 2017)
 - Seminars (November 2016)



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