



Education



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Schools Sector

A strong school sector

– an integral part of international education in Australia

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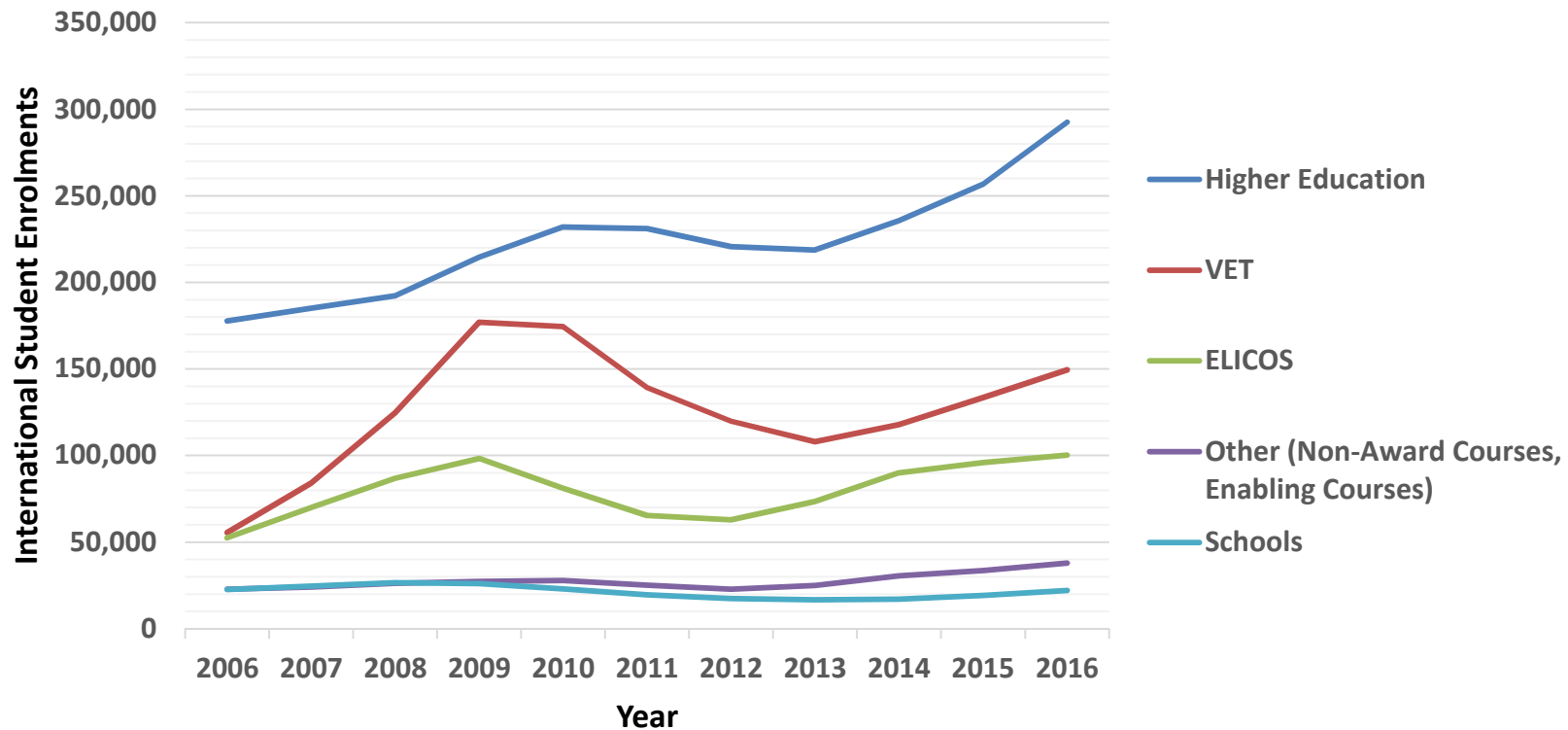
Session Outline

- What the data tells us
- The school sector role
- How we deliver
- Challenges and opportunities
- Strategies



School Sector – Data

International Student Enrolments - by Sector
July YTD 2006 - July YTD 2016



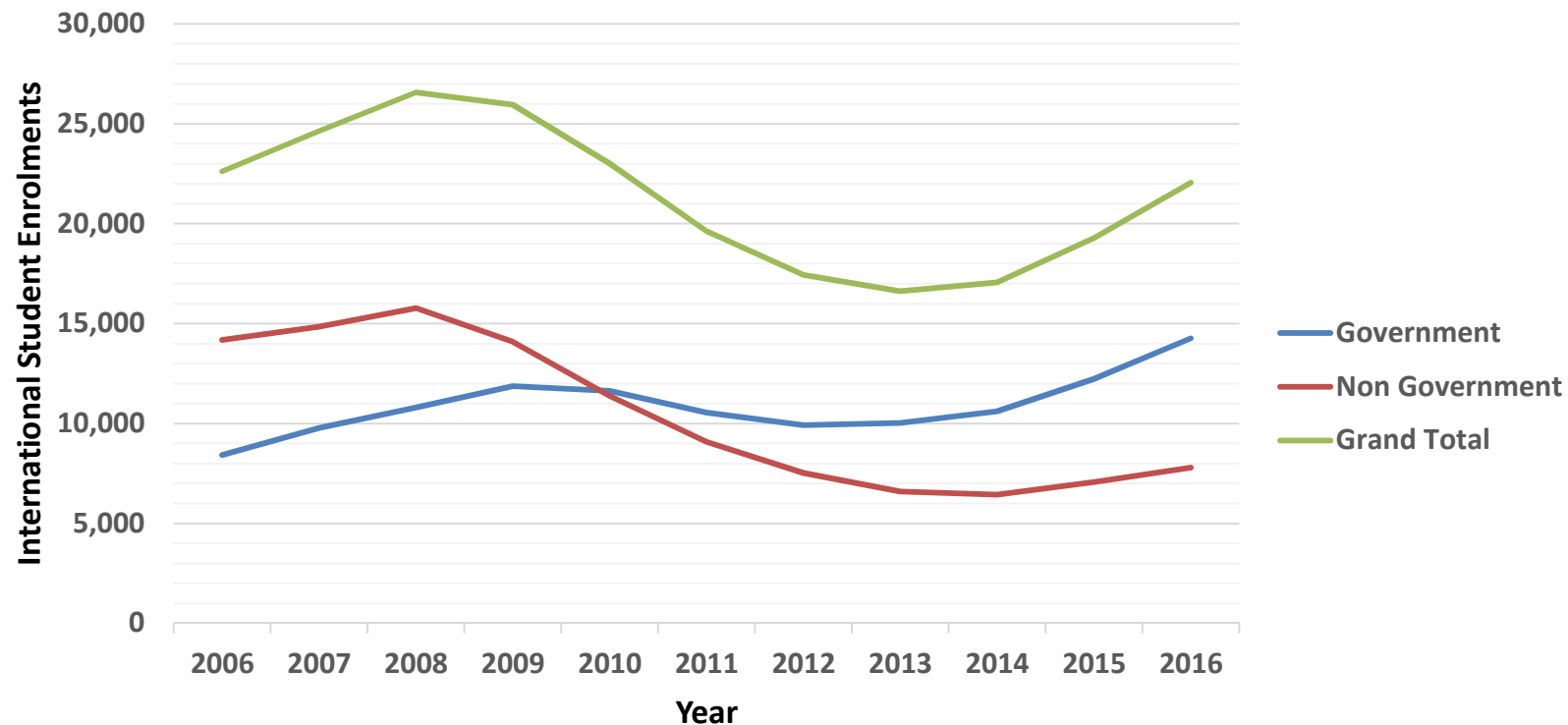
Source: data from Australian Government Department of Education and Training July 2016 pivot table



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Government and Non-Government Schools Sector

International Student Enrolments - by Provider Type
July YTD 2006 - July YTD 2016



Source: data from Australian Government Department of Education and Training July 2016 pivot table

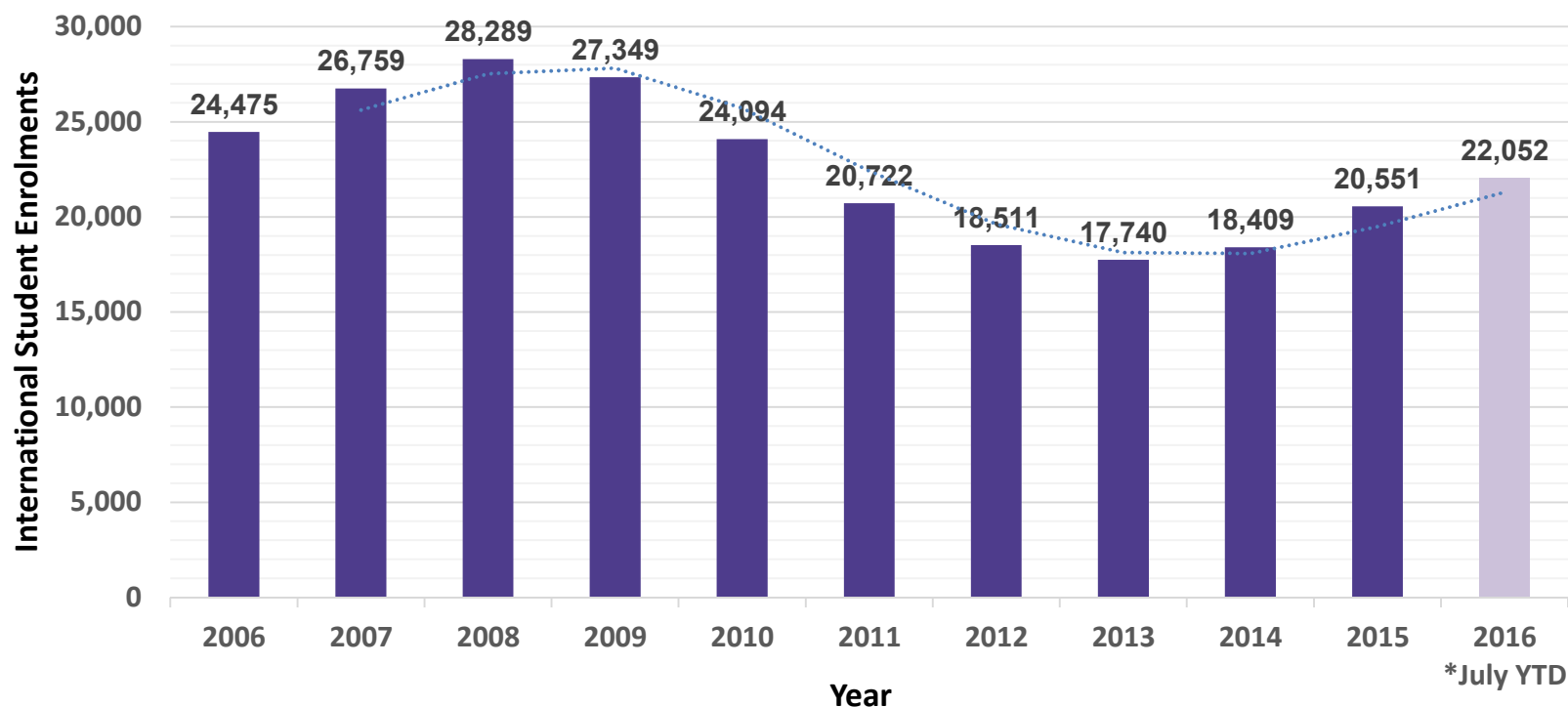


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School Sector – Back to Growth 2006 – 2015

International Student Enrolments (School Sector)

December YTD 2006 – December YTD 2015



Source: data from Australian Government Department of Education and Training July 2016 pivot table

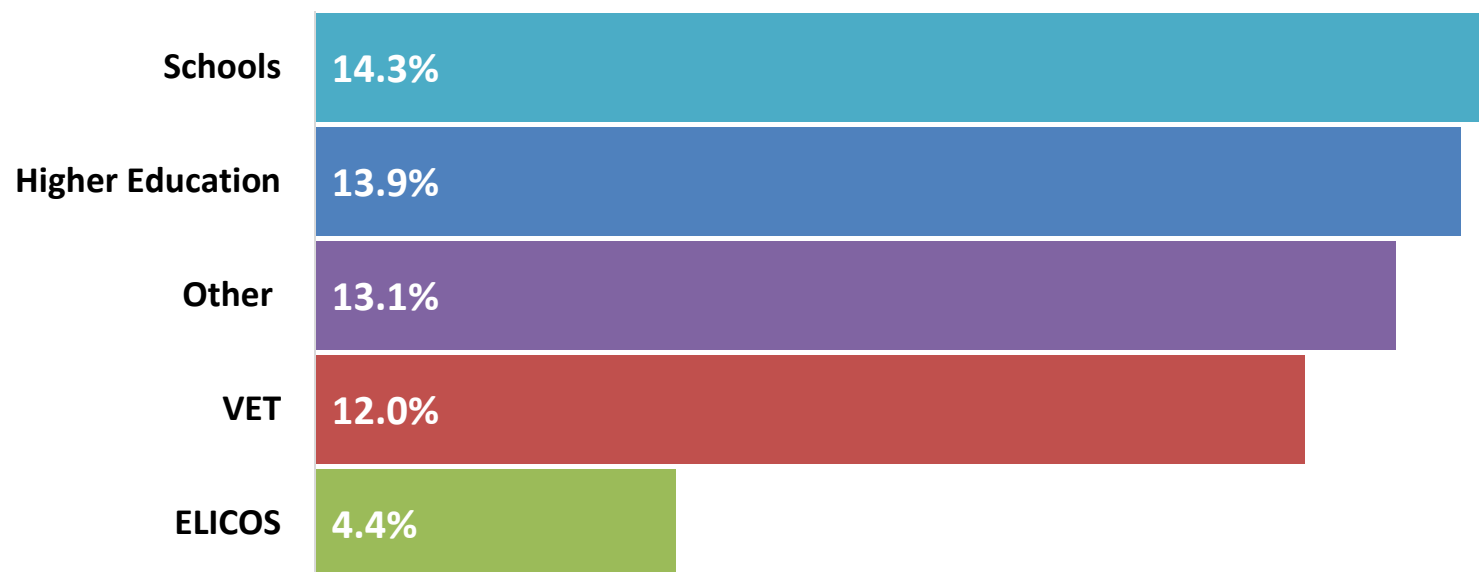


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Growth in Enrolments by Sector June 2015 – 2016

Growth in Enrolments - *by Sector* *June 2015 - June 2016*



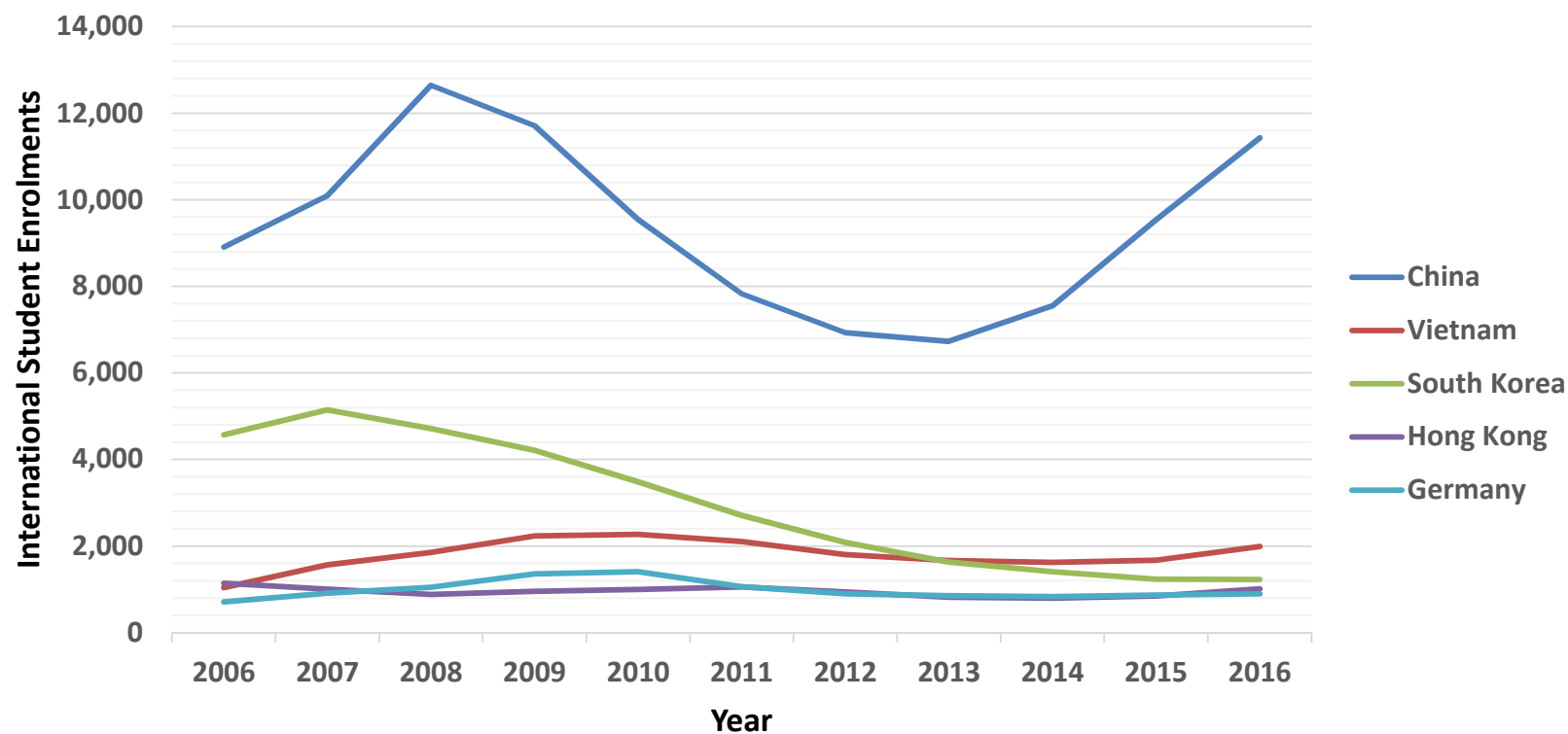
Source: data from Australian Government Department of Education and Training July 2016 pivot table



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Top 5 Countries for School

International Student Enrolments (School Sector)
July YTD 2006 – July YTD 2016



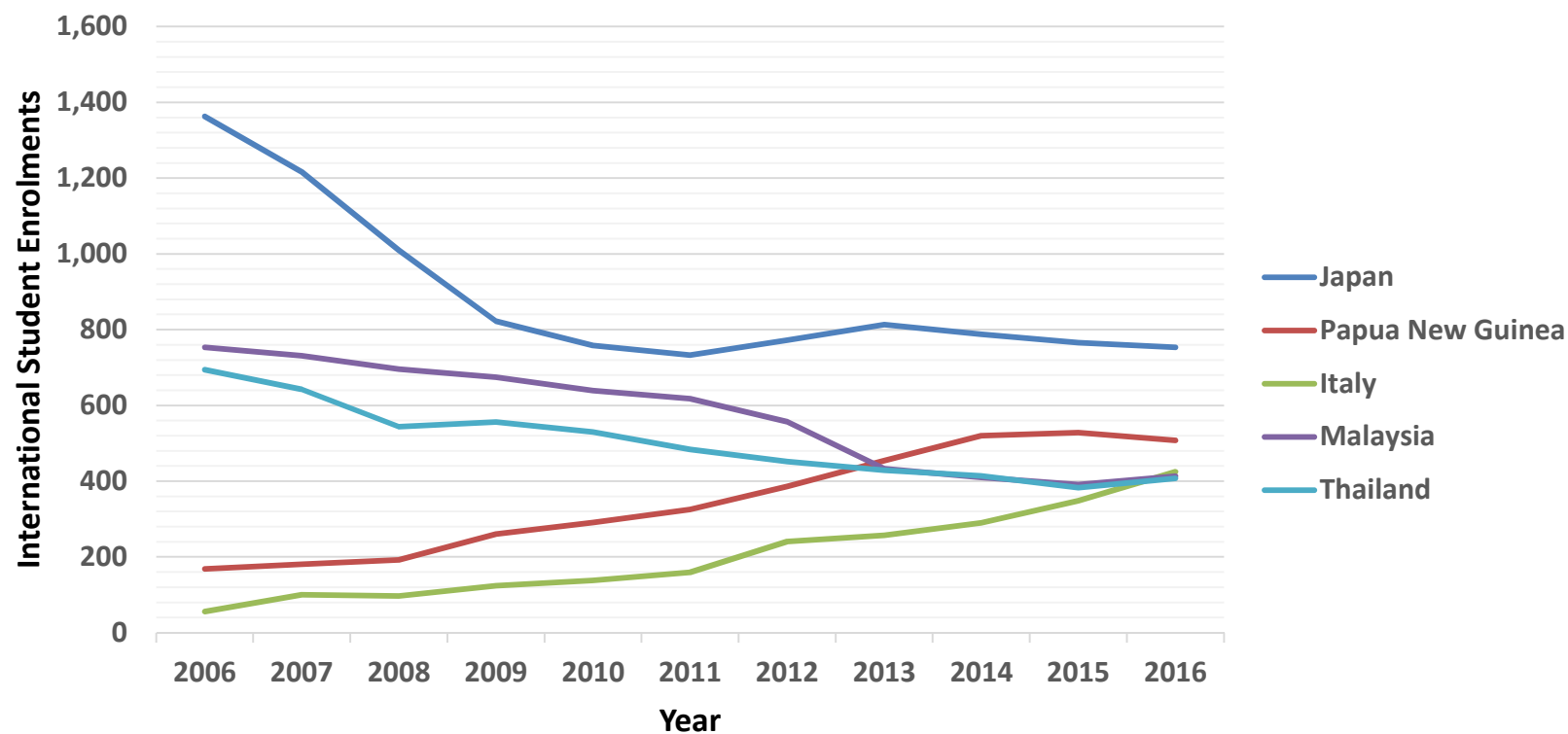
Source: data from Australian Government Department of Education and Training July 2016 pivot table



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Next 5 Countries

International Student Enrolments (School Sector)
July YTD 2006 – July YTD 2016



Source: data from Australian Government Department of Education and Training July 2016 pivot table



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China – main source of growth

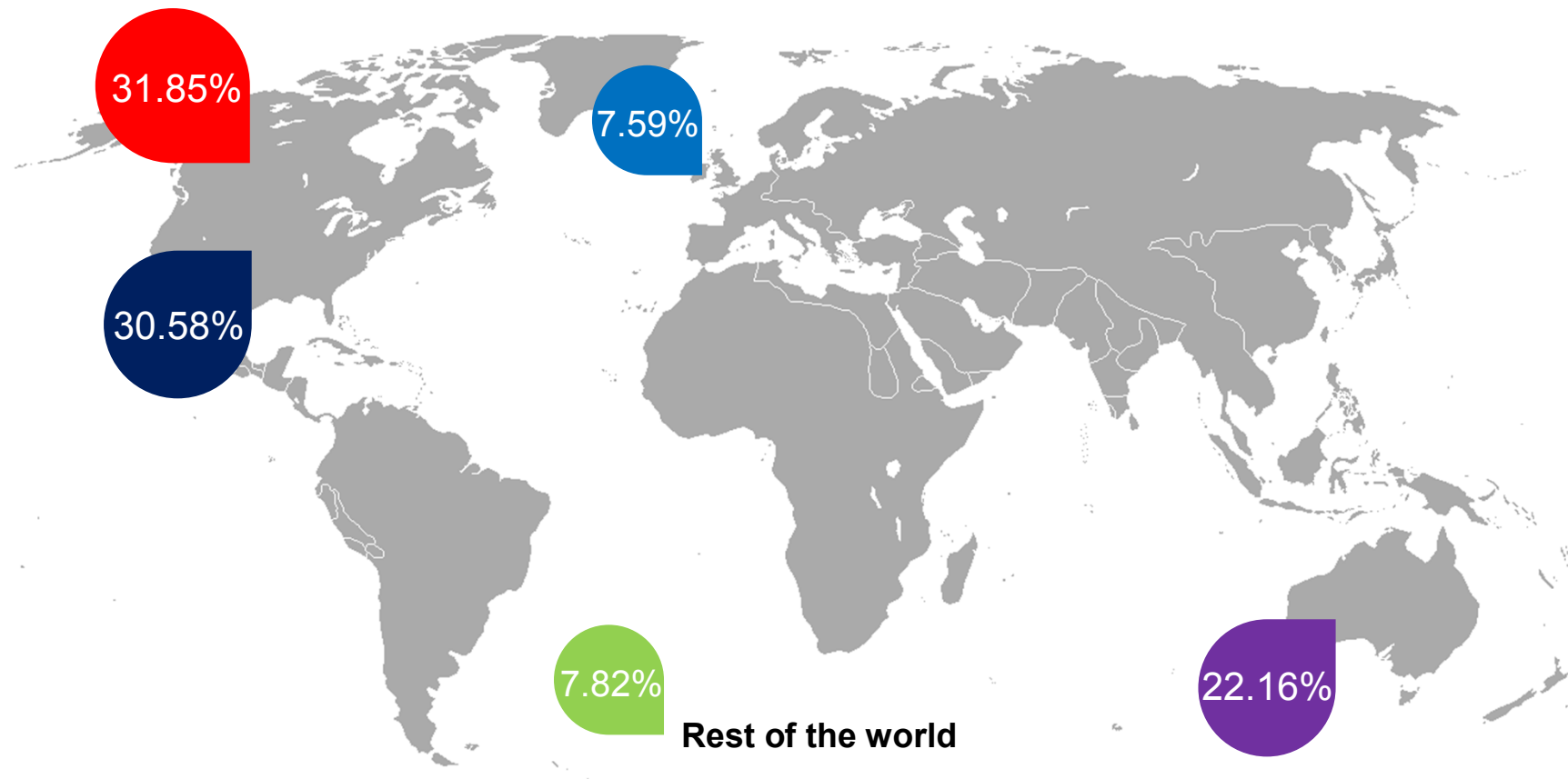
International Student Enrolments (School Sector) – China

Level of Study	July YTD 2015	July YTD 2016	Change (%)
Junior Secondary	2397	3116	30%
Senior Secondary	7127	8287	16.28%

Source: data from Australian Government Department of Education and Training July 2016 pivot table

China – Competitors!

Top Study Destinations for Chinese Students – School Sector



Source: data from Austrade April 2015 & EIC Report 2014

USA, Canada, UK

Leading places of origin of international secondary students in Anglophone countries, 2013

Australia		Canada		U.K.		U.S.	
Place of Origin	% of Total	Place of Origin**	% of Total	Place of Origin	% of Total	Place of Origin	% of Total
China	48.9	China	31.2	Hong Kong	22.1	China	32.3
Vietnam	10.3	South Korea	17.5	China	15.0	South Korea	12.0
South Korea	7.6	Mexico	5.1	Germany	8.4	Germany	9.8
Germany	5.2	Japan	3.7	Russia	8.3	Mexico	3.6
Japan	4.4	Germany	3.6	Other European Economic Area	7.5	Brazil	3.1
All Int'l Secondary Students	16,693		23,757		25,912		73,019

Source: from 'Charting New Pathways to Higher Education: International Secondary Students in the United States' (Farrugia 2014, p.g. 21)



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How we deliver

- Safe environments
- Strong welfare and support programs
- Quality education – curriculum, class sizes, pedagogy
- Student outcomes – academic results, personal growth



How we deliver



- Broad curriculum
- Soft skills development
 - Problem solving
 - Independent learning and research skills
 - Analytical and creative thinking
 - Self-confidence & leadership
 - Technology skills



How we deliver

➤ Teaching methodologies

- Project based learning
- Group work
- Research
- Role of teacher - guides students, questions

➤ Opportunities for engagement in school and local communities

- Extra-curricula activities
- Teams, clubs, music/drama groups
- Peer support, buddy programs
- Volunteer work, charity and fundraising

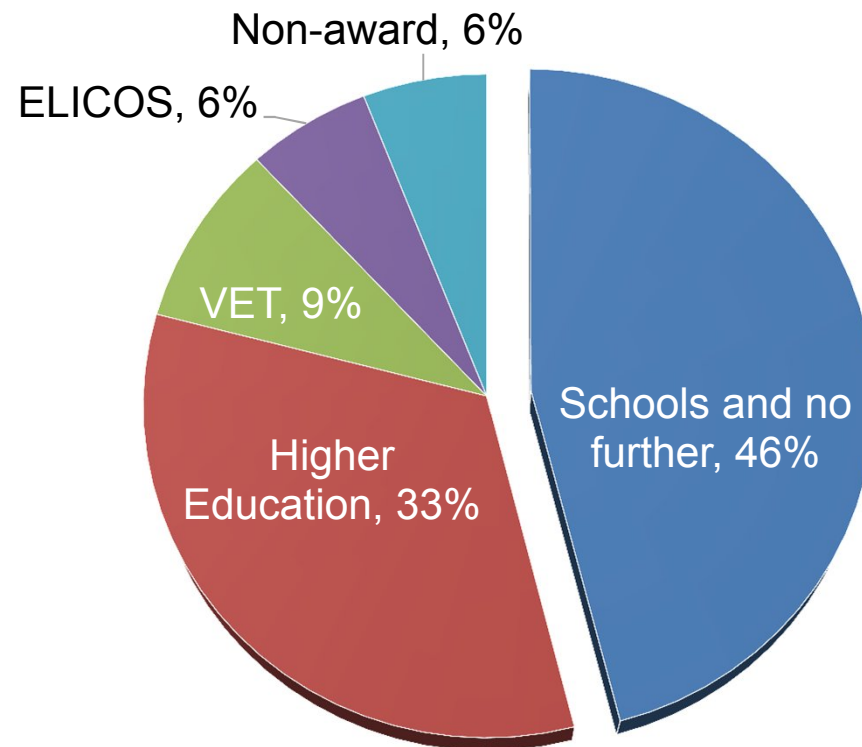


Schools – a Pathway program

- Australian Secondary School Certificate - ATAR
- First student experience of adapting to new culture and education system
- Development of English language skills
- 21st Century learning - foundation for further study
- Of student who complete Year 12 secondary certificates 88%-92% continue study in Australia (school surveys)

Schools – a Pathway program

Sector in which enrolled immediately after Schools



Source: data from 'Study pathways of international students in Australia (Research Paper 2015/2)', (Australian Government Department of Education and Training 2015, p.g. 4)

Schools – a Pathway program

Table 6. Top 10 nationalities and their direct and indirect inter-sector study pathway from school

Nationality	Inter-sector pathway					Total
	Schools only	Schools- Higher Education	Schools- VET	Schools- ELICOS	Schools- Non- award	
	Proportion of total for each nationality					
China	16.6%	50.1%	14.2%	9.9%	9.7%	2,572
Vietnam	17.8%	42.2%	23.4%	10.4%	5.6%	538
Japan	58.6%	6.5%	2.3%	1.0%	0.0%	307
Brazil	97.5%	1.7%	0.8%	0.0%	0.0%	238
Republic of Korea	31.2%	27.0%	11.4%	3.8%	4.2%	237
Germany	98.7%	1.3%	0.0%	0.0%	0.0%	235
Italy	99.5%	0.0%	0.0%	0.5%	0.0%	222
Hong Kong	15.0%	50.0%	13.1%	3.7%	15.0%	214
Malaysia	20.9%	57.5%	11.2%	1.5%	11.2%	134
Thailand	21.3%	29.8%	17.0%	8.5%	5.3%	94

Legend (% of total):

40% to <50%

50% to 70%

> 70%

Source: data from 'Study pathways of international students in Australia (Research Paper 2015/2)', (Australian Government Department of Education and Training 2015, p.g. 5)



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Trends & Opportunities

- Austrade China - report on:
 - study tours / summer camps – see before you buy
 - go younger trend continues – 14 – 15 years
 - students going abroad for high school stay for further study
- Growing demand for short term programs 6 – 12 months from Japan
- Growth in study tours from all main source countries
- Ministries of Education in China, Korea and Japan require schools to develop international engagement programs.

Trends

- Australia's onshore international education sector forecast to grow from 650,000 enrolments today to **940,000 by 2025 with export earnings in excess of \$33 billion**
- The top eight source markets for enrolments across all sectors in 2025 expected to be China, India, Vietnam, Thailand, Nepal, Malaysia, Brazil and South Korea.

*Source: data from 'Growth and opportunity in Australian International Education',
Deloitte Access Economics, report prepared for Austrade December 2015*



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Trends

- **Growth in enrolments will be driven by Asia**
– in particular **China**, India, Nepal, **Vietnam** and **Thailand**.
- **China** is expected to remain Australia's largest source market with the **largest number of higher education, schools and ELICOS** enrolments.

*Source: data from 'Growth and opportunity in Australian International Education',
Deloitte Access Economics, report prepared for Austrade December 2015*



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Conclusion

- Schools have much to offer as a pathway program
 - Students well prepared for further study with established support networks
 - Increasing demand for overseas school education in key markets
- Opportunities to connect with the school sector – building links with universities and overseas Education Ministries.
- A strong school sector benefits all sectors.

THANK YOU!

