DE INTERNATIONAL

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A strong school sector
– an integral part of international education in Australia

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Chair, Australian Government Schools International (AGSI)
Chief Education Officer, NSW Department of Education – International
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
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
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
Growth in Enrolments by Sector
June 2015 – 2016

<table>
<thead>
<tr>
<th>Sector</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>14.3%</td>
</tr>
<tr>
<td>Higher Education</td>
<td>13.9%</td>
</tr>
<tr>
<td>Other</td>
<td>13.1%</td>
</tr>
<tr>
<td>VET</td>
<td>12.0%</td>
</tr>
<tr>
<td>ELICOS</td>
<td>4.4%</td>
</tr>
</tbody>
</table>

Source: data from Australian Government Department of Education and Training July 2016 pivot table
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
Next 5 Countries

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

- Japan
- Papua New Guinea
- Italy
- Malaysia
- Thailand

Source: data from Australian Government Department of Education and Training July 2016 pivot table
China – main source of growth

**International Student Enrolments (School Sector) – China**

<table>
<thead>
<tr>
<th>Level of Study</th>
<th>July YTD 2015</th>
<th>July YTD 2016</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Junior Secondary</td>
<td>2397</td>
<td>3116</td>
<td>30%</td>
</tr>
<tr>
<td>Senior Secondary</td>
<td>7127</td>
<td>8287</td>
<td>16.28%</td>
</tr>
</tbody>
</table>

*Source: data from Australian Government Department of Education and Training July 2016 pivot table*
China – Competitors!

Top Study Destinations for Chinese Students – *School Sector*

- **31.85%**
- **30.58%**
- **7.59%**
- **7.82%**
- **22.16%**

Rest of the world

*Source: data from Austrade April 2015 & EIC Report 2014*
Leading places of origin of international secondary students in Anglophone countries, 2013

<table>
<thead>
<tr>
<th>Country</th>
<th>Place of Origin</th>
<th>% of Total</th>
<th>Place of Origin</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>China</td>
<td>48.9</td>
<td>China</td>
<td>31.2</td>
</tr>
<tr>
<td></td>
<td>Vietnam</td>
<td>10.3</td>
<td>South Korea</td>
<td>17.5</td>
</tr>
<tr>
<td></td>
<td>South Korea</td>
<td>7.6</td>
<td>Mexico</td>
<td>5.1</td>
</tr>
<tr>
<td></td>
<td>Germany</td>
<td>5.2</td>
<td>Japan</td>
<td>3.7</td>
</tr>
<tr>
<td></td>
<td>Japan</td>
<td>4.4</td>
<td>Germany</td>
<td>3.6</td>
</tr>
<tr>
<td></td>
<td>All Int'l Secondary Students</td>
<td>16,693</td>
<td>23,757</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Place of Origin</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>Hong Kong</td>
<td>22.1</td>
</tr>
<tr>
<td></td>
<td>China</td>
<td>15.0</td>
</tr>
<tr>
<td></td>
<td>South Korea</td>
<td>12.0</td>
</tr>
<tr>
<td></td>
<td>Germany</td>
<td>9.8</td>
</tr>
<tr>
<td></td>
<td>Mexico</td>
<td>3.6</td>
</tr>
<tr>
<td></td>
<td>Brazil</td>
<td>3.1</td>
</tr>
<tr>
<td></td>
<td>Other European Economic Area</td>
<td>7.5</td>
</tr>
<tr>
<td></td>
<td>Germany</td>
<td>8.3</td>
</tr>
<tr>
<td></td>
<td>Russia</td>
<td>8.3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Place of Origin</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.K.</td>
<td>China</td>
<td>32.3</td>
</tr>
<tr>
<td></td>
<td>South Korea</td>
<td>12.0</td>
</tr>
<tr>
<td></td>
<td>Germany</td>
<td>9.8</td>
</tr>
<tr>
<td></td>
<td>Mexico</td>
<td>3.6</td>
</tr>
<tr>
<td></td>
<td>Brazil</td>
<td>3.1</td>
</tr>
<tr>
<td></td>
<td>Other European Economic Area</td>
<td>7.5</td>
</tr>
</tbody>
</table>

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

- Schools and no further, 46%
- Higher Education, 33%
- VET, 9%
- ELICOS, 6%
- Non-award, 6%

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

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Inter-sector pathway</th>
<th>Proportion of total for each nationality</th>
<th>Total Students</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Schools only</td>
<td>Schools Higher Education</td>
<td>Schools VET</td>
</tr>
<tr>
<td>China</td>
<td>16.6%</td>
<td>50.1%</td>
<td>14.2%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>17.8%</td>
<td>42.2%</td>
<td>23.4%</td>
</tr>
<tr>
<td>Japan</td>
<td>58.6%</td>
<td>6.5%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Brazil</td>
<td>97.5%</td>
<td>1.7%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Republic of Korea</td>
<td>31.2%</td>
<td>27.0%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Germany</td>
<td>98.7%</td>
<td>1.3%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Italy</td>
<td>99.5%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>15.0%</td>
<td>50.0%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>20.9%</td>
<td>57.5%</td>
<td>11.2%</td>
</tr>
<tr>
<td>Thailand</td>
<td>21.3%</td>
<td>29.8%</td>
<td>17.0%</td>
</tr>
</tbody>
</table>

**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)*
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.

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**.
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!