Council for International Education: 
Brand and Destination Marketing  
Working Group Update

2018 AIEC

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Deputy Vice Chancellor  
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- Terms of Reference: International Education Nation Brand Consultation and Coordination of Destination Marketing Spend
- Timeline: December 2017- June 2018
- Co Chairs:
  - Brand — Kelly Ralston, AusTrade;
  - Destination Marketing — Karyn Kent, Study Adelaide
- Members: cross-sector, geographically diverse
Principles
1. Cooperation provides benefits for all and can occur at various levels
2. Collaboration should occur on an opt-in, rather than mandated basis
3. The framework is a tool to provide insight and guidance
4. The framework relies on quality data that is updated annually
5. The framework is a dynamic, iterative resource.

Proactive Opportunities
1. Market specific opportunities - emerging* markets; high-cost markets; markets where competitor performance presents opportunities or threats
2. Specific sector, discipline or industry opportunities
3. Australian industry skills shortages

Reactive Opportunities
1. Time sensitive policy opportunities
2. Critical incidents
Figure 1: Conceptual presentation of Market Prioritisation across tiers

Markets where activity is intensive (across sectors)
- Brazil: 36k
- Spain: 7.5k
- France: 6k

Markets where activity is widespread and intensive
- Italy: 10k
- Indonesia: 20k
- Hong Kong: 18k
- Japan: 16k
- India: 88k
- Malaysia: 33k
- South Korea: 31k
- Thailand: 31k
- China: 232k
- Vietnam: 30k
- Taiwan: 18k

Markets for opportunistic marketing activities
- Nigeria: 3k
- Turkey: 2.5k
- Bhutan: 2k
- Papua New Guinea: 1.5k
- Bangladesh: 4k
- Sri Lanka: 11k
- USA: 12k
- UK: 7.5k
- Germany: 5.5k
- Pakistan: 16k

Markets where activity is widespread (across jurisdictions)
- Nepal: 35k
- Colombia: 21k
- Philippines: 11k

Countries with fewer jurisdictions where more than one-third of providers have enrolments
- Nigeria: 3k
- Turkey: 2.5k
- Bhutan: 2k
- Papua New Guinea: 1.5k
- Bangladesh: 4k
- Sri Lanka: 11k
- USA: 12k
- UK: 7.5k

Countries with more jurisdictions where more than one-third of providers have enrolments
- Nigeria: 3k
- Turkey: 2.5k
- Bhutan: 2k
- Papua New Guinea: 1.5k
- Bangladesh: 4k
- Sri Lanka: 11k
- USA: 12k
- UK: 7.5k

Legend:
- 2
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