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**In focus Africa:
The world's fastest-
growing continent**

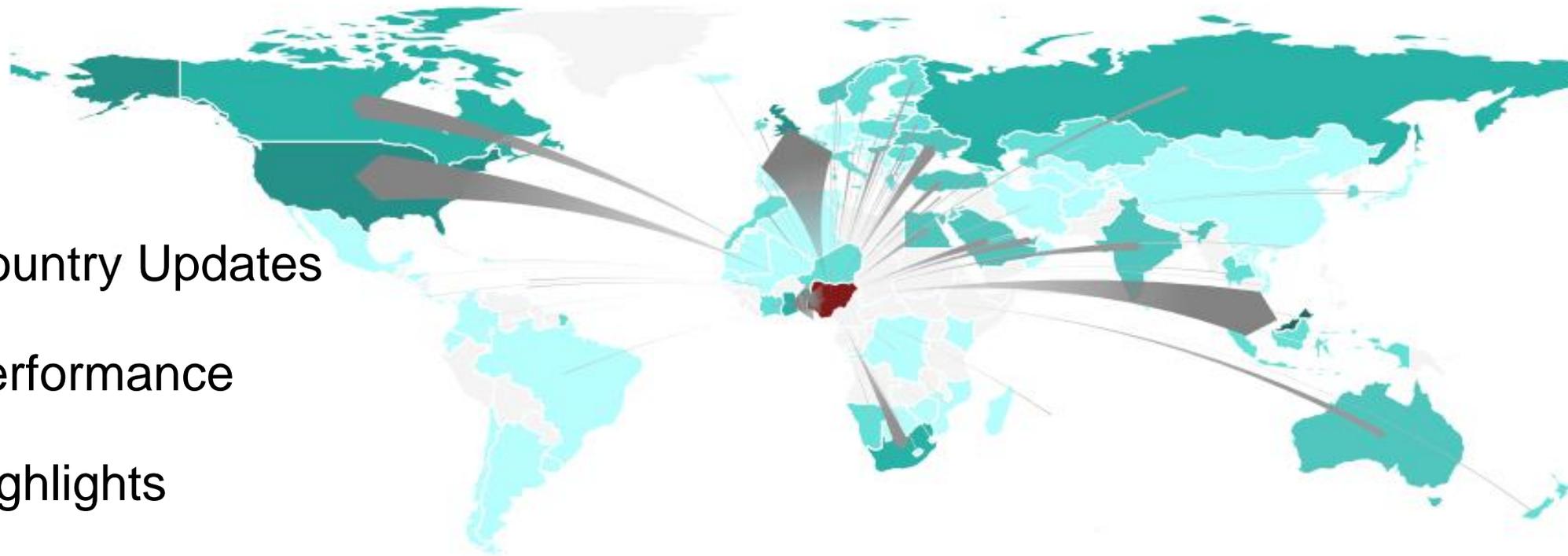


In Focus: Nigeria



Opportunities and Challenges

- Country Updates
- Performance
- Highlights
- Challenges
- Recommendations



Internationally mobile students:
0 100 1,000 5,000 10,000 50,000

Nigeria

In Focus: Nigeria

Country Updates

- Economic Growth 1.95% YoY 1Q 2018
 - Largest in Africa
 - Volatility - Heavily reliant on oil; 90% exports / 70% gov revenues (fluctuations cause instability)
- Ranked 30th-largest economy in the world in terms of nominal GDP
 - ***Africa's growing giant*** with an enviable supply of the world's most valuable commodity, the oil and gas sector is a key driver of the economy (constituting 90-95 percent of foreign exchange earnings)



In Focus: Nigeria

Country Updates



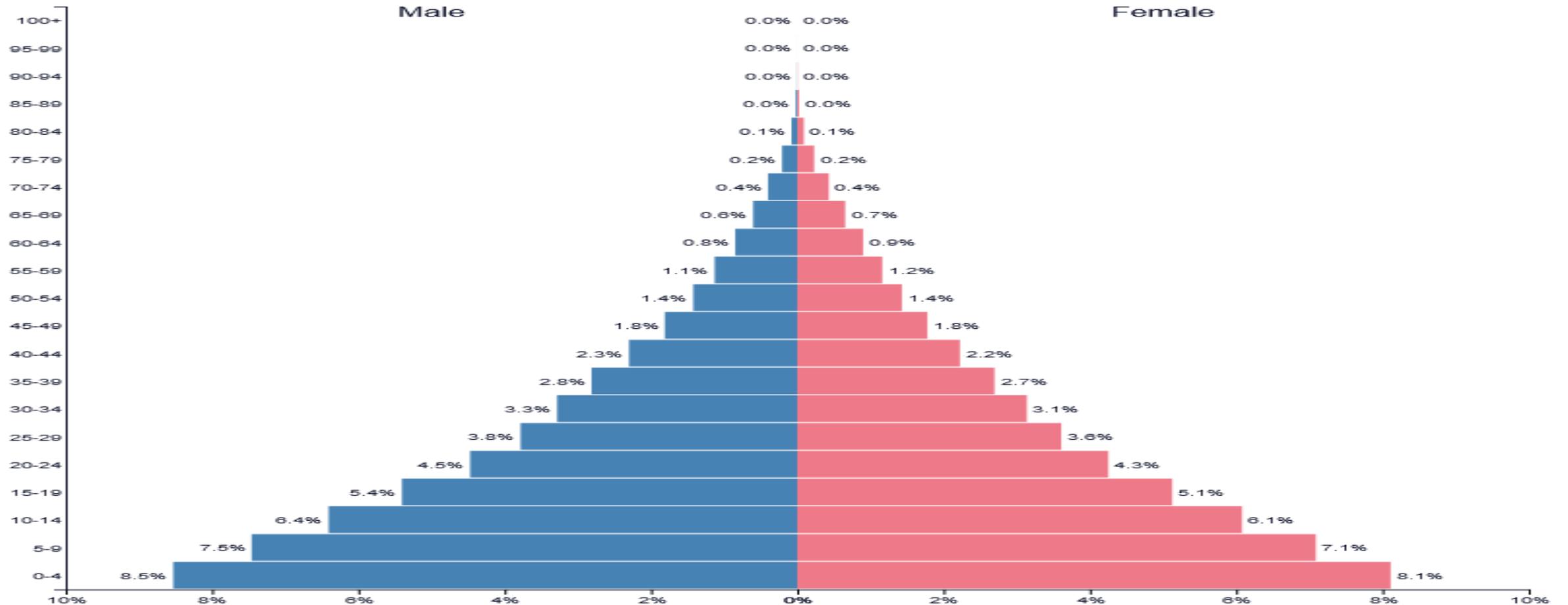
- Concentrated wealth (high inequality)



- Growing middle class and rising purchasing power
 - Approx. 23% of the population
- Large population and population growth rate
- 196,752,840 (UN predicts 400,000,000 by 2050)
 - Behind India and China only
- Greater Lagos area 20,000,000+

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44% population under the age of 15 / 60% under 25

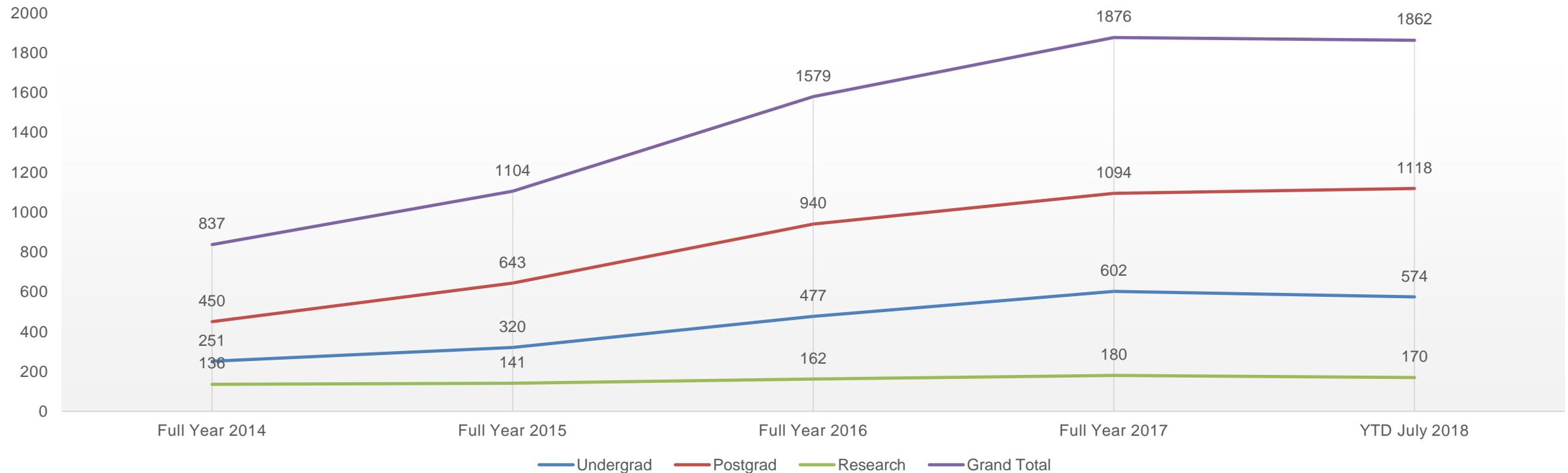


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Performance

Enrolments					
Study Level	Full Year 2014	Full Year 2015	Full Year 2016	Full Year 2017	YTD July 2018
Undergrad	251	320	477	602	574
Postgrad	450	643	940	1094	1118
Research	136	141	162	180	170
Grand Total	837	1104	1579	1876	1862

Nigerian Enrolments HE Australia (to July 2018)



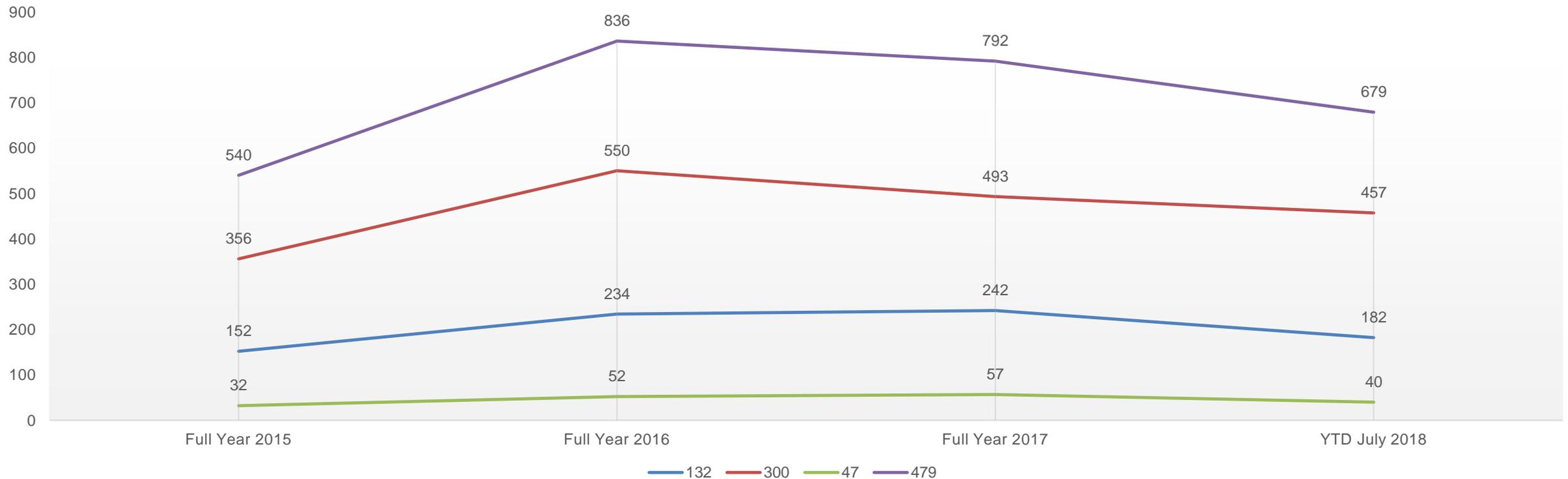
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Performance

Commencements					
Study Level	Full Year 2014	Full Year 2015	Full Year 2016	Full Year 2017	YTD July 2018
Undergrad	132	152	234	242	182
Postgrad	300	356	550	493	457
Research	47	32	52	57	40
Grand Total	479	540	836	792	679

Nigerian Commencements HE Australia (to July 2018)

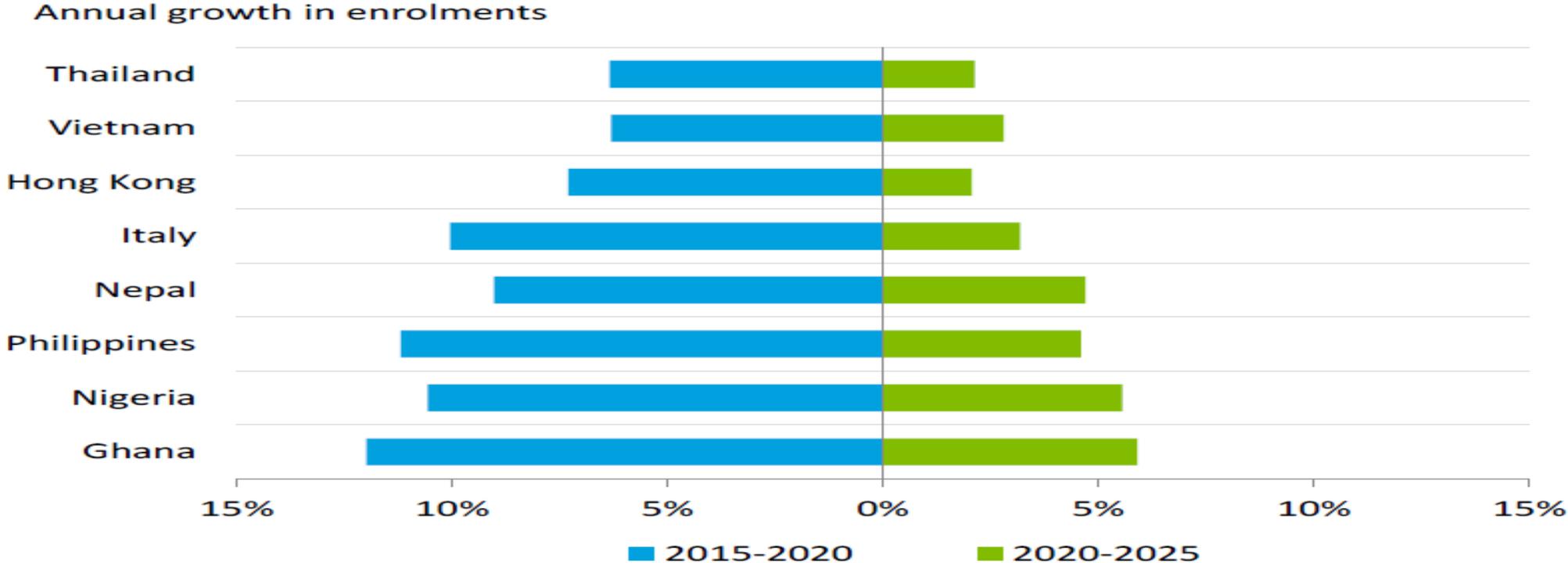


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Performance

Nigeria - projected to increase enrolments by between 6.5% - 9.0% per annum over 2015-2025 under the baseline (AIE National Strategy)

Chart 2.4: Annual % enrolments growth in fastest growing source markets (as determined by % growth)



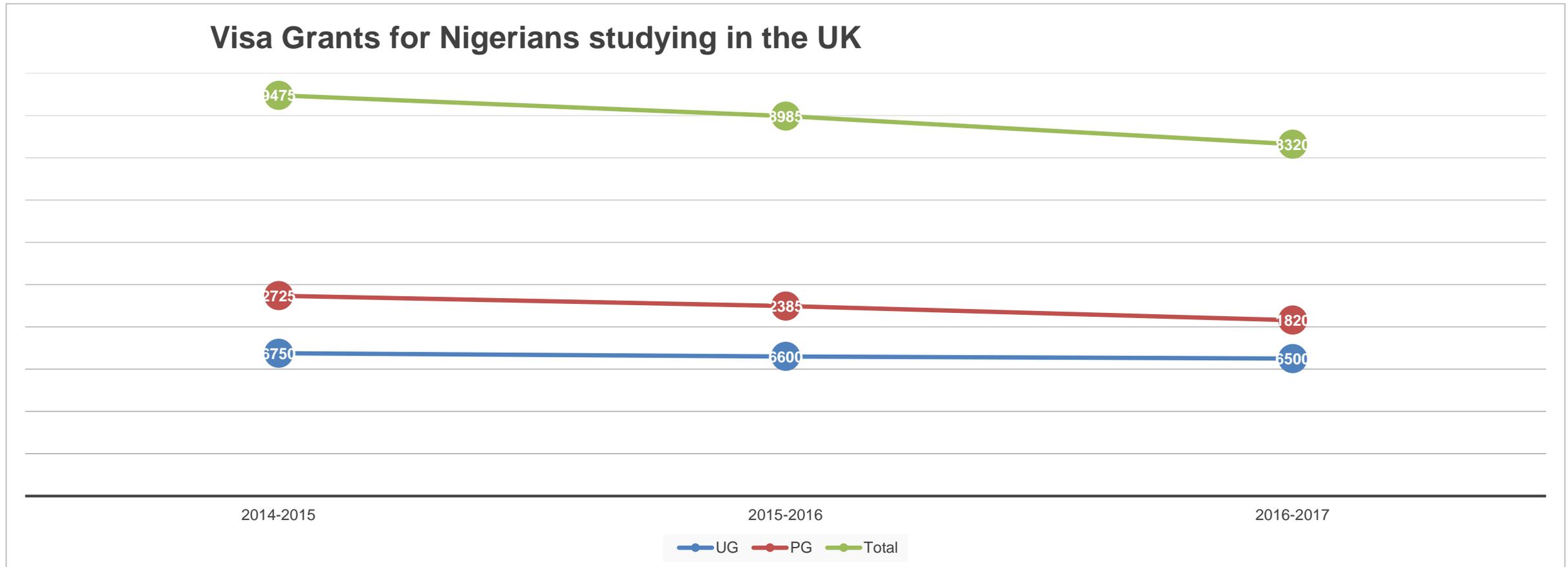
Source: Deloitte Access Economics

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Performance

	2014-2015	2015-2016	2016-2017
UG	6750	6600	6500
PG	2725	2385	1820
Total	9475	8985	8320

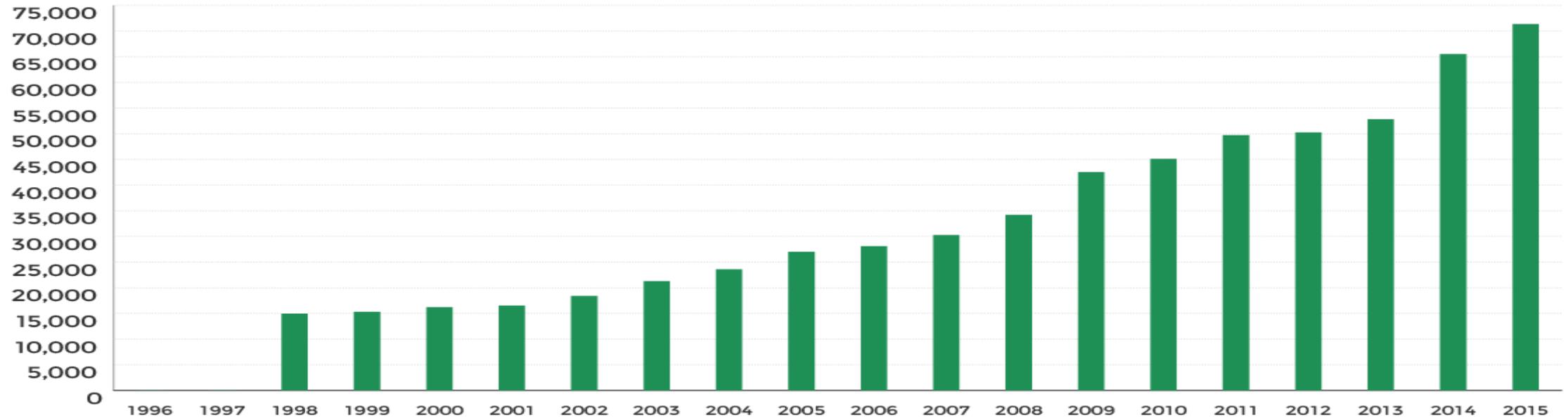
Visa Grants for Nigerians studying in the UK



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Performance

Number of Outbound Nigerian Students between 1996 and 2015

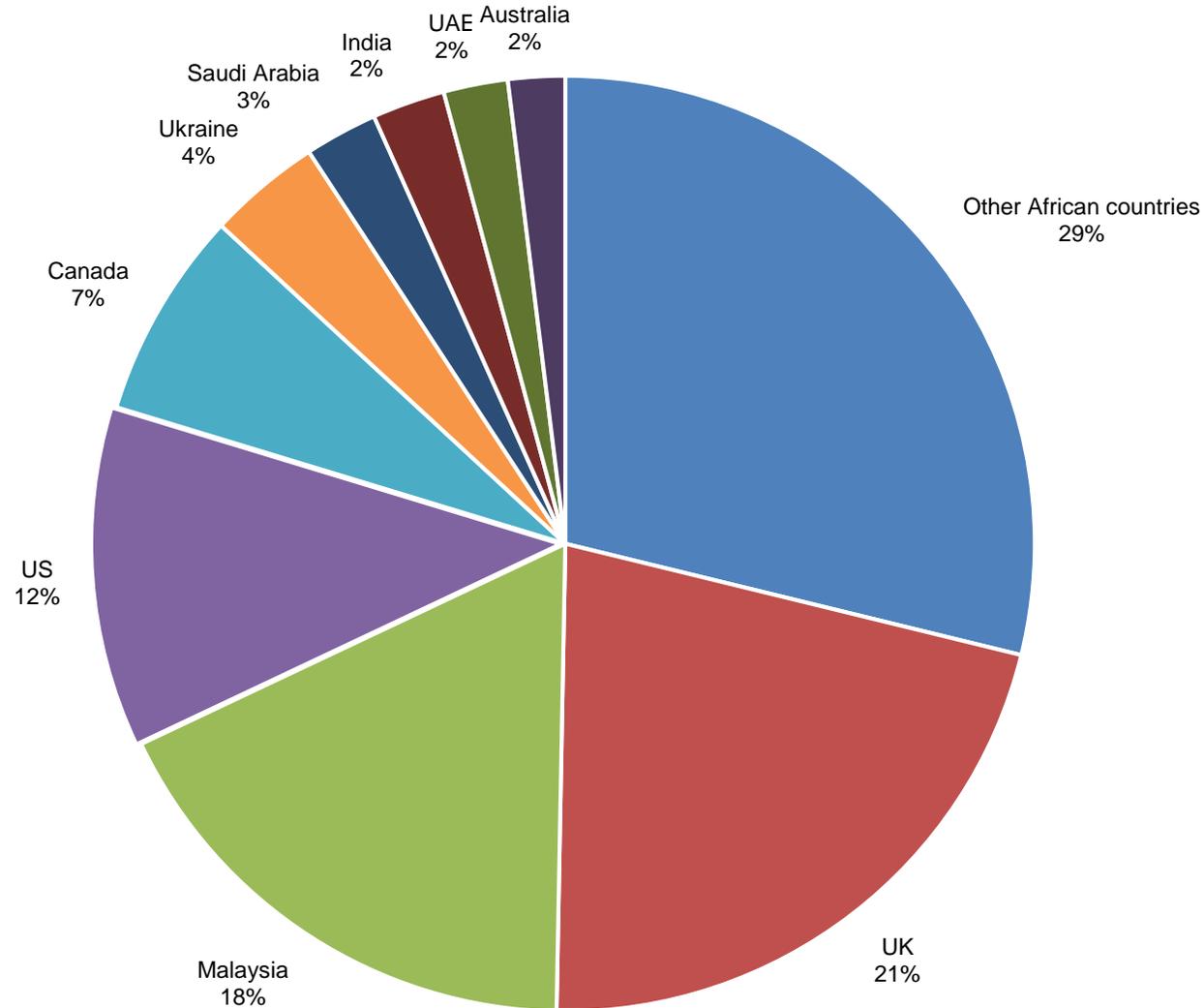


Source: UIS UNESCO

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Performance

Where Nigerians were studying in 2017



Other Africa	24000
UK	17881
Malaysia	14705
US	9786
Canada	5982
Ukraine	3252
Saudi Arabia	2093
India	2088
UAE	1845
Australia	1632

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Highlights



Youth literacy rate of 70%



English speaking / LOI



Motivation for higher education



Willing to travel / mobile population

Social / lifestyle



Growing diaspora

Opportunities in Australia

Changes in UK policy / “*sense of un-welcomeness*”

General profile of Nigerian student considering study in Australia

- Wealthy family – government, self-employed, sponsored
- Private school in Lagos/Abuja/Port Harcourt
- Business or engineering, mostly postgraduate / often UG in UK; looking to ‘broaden their horizons elsewhere’
- Family in the UK – experienced traveller
- Interested to mix (not segregating themselves from other students)
- University rankings not a priority; program, location, price and work opportunities take precedence (generally suitability)

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Highlights



Quality agents



In-country representatives



Australian government support



Qualified students (PG/UG)



Diverse range of program interest

Smooth cultural adjustment

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Added Student Motivations

- Lack of institutions to absorb eligible students (especially quality institutions)
 - *Overburdened by population growth (continuing to decline)*
 - *Number of applicants currently exceeds the number of available university seats by a ratio of two to one*
 - *Over 1 million qualified Nigerians without access to university places on an annual basis*
- Funding cuts and underfunded higher education system
- Ongoing student protests and strikes
- High unemployment among university graduates (2017 report listed 47%)

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Challenges

- DFAT travel warnings / safety issues
 - In-country representative
- One city based market?
 - Abuja
 - Ibadan
 - Port Harcourt



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Challenges



Compliance (perplexing)

- SSVF assessment level 3
- GTE checks
- Student perceptions – Australian Student Visa Process and visa obtainment difficult



Restrictions / limits on foreign exchange

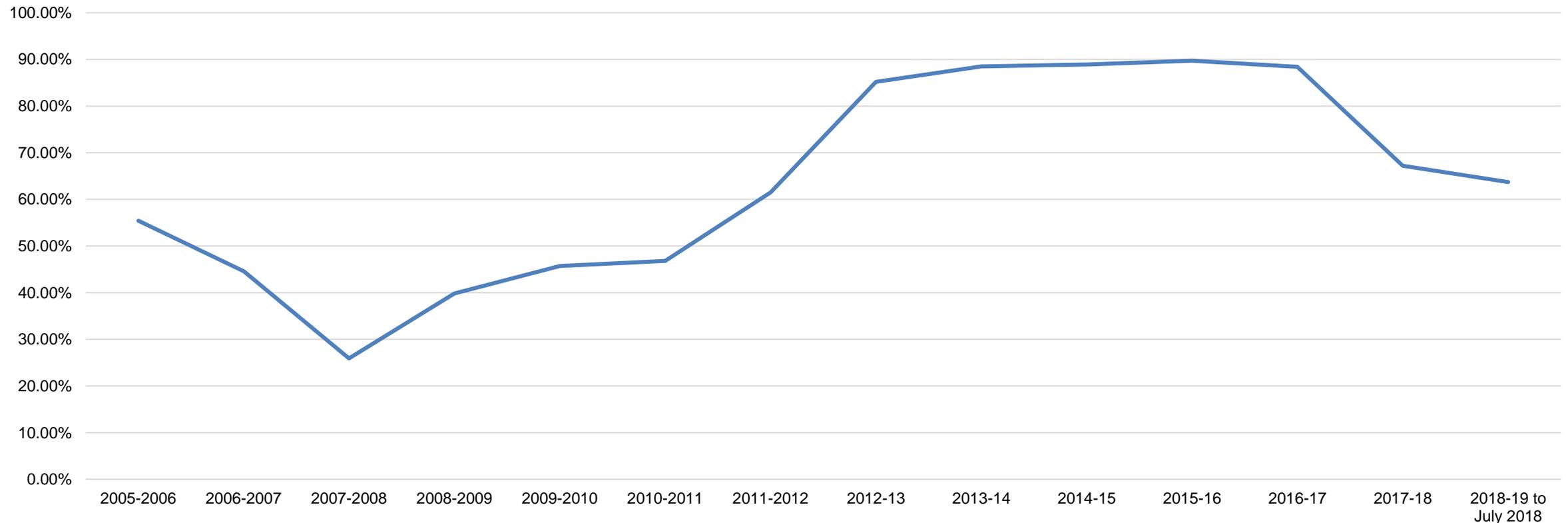
Entry requirements and academic literacy

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Challenges

Financial year	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	July 2018
Percentage successful visa grants	55.40%	44.60%	25.90%	39.80%	45.70%	46.80%	61.50%	85.20%	88.50%	88.90%	89.70%	88.40%	67.20%	63.70%

Visa applications from Nigeria for Australia HE Sector: Percentage grants



Genuine temporary entrant checklist

Extensive (internal and external) **GTE checklist** - agent must go through with every applicant (*too many points to list in a PPT*)

Main points:

- Marital status (must be disclosed)
- Previous visa refusals
- Statement of purpose that must
 - outline aspirations
 - how the degree will be used
 - address any anomalies (study gap, visa refusals, change of academic direction)
- Financial viability
 - The applicant must demonstrate evidence of their spouse (or de facto partner) or parent/s annual income in excess of at least \$60,000 or \$70,000 for accompanied students.
 - or*
 - Evidence of funds to cover living, tuition, travel and study costs for first 12 months

General Entry Requirements

Undergraduate

West African Senior School Certificate (WASSCE) or National Examinations Council examinations (NECO) *must go via pathway (no direct entry)*



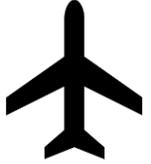
Postgraduate

- National Universities Commission, Nigeria (NUC) accreditation
- NOOSR
- UK NARIC



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Recommendations



Regular visits – no substitute

In-country representative



Engage DHA, Austrade, High Commission

Build government and corporate linkages



Alumni engagement – brand ambassadors



Digital and social media

Institutional engagement – schools and universities



Grow reputation – build brand awareness

Agent Management

- Careful selection – high quality agents in Nigeria
- Training and regular support
- SSVF / GTE support
- Partnership and relationship
- Understanding each others position and needs
- Proactive not reactive – have a strategy



In Focus: Nigeria

Recommendations

Student Experience (word of mouth)

- Student Society (MUASA)
- Cultural events
- Pre-departure
- Orientation and welcome events
- Study skills and MQ numeracy centre
- Buddy/mentor programs
- Careers and employment



Questions?

