International students in Australia beyond dollars, migrants and spies

NICOLE BRIGG & PHILIPP IVANOV

AIEC 2018
Structure of the presentation


2. International Students – key contributors to Australia’s engagement with Asia

3. How to create a new narrative and maximise the benefits of International students to Australia
1  Rise of Asia. Australia and Asia
Rise of Asia. Australia and Asia

AUSTRALIA DISRUPTED: TRENDS VS COUNTER - TRENDS

**TRENDS**

1. Asia’s economic ascendency
2. Changing Australian society
3. Asia’s geopolitical rebalance

**COUNTER-TRENDS**

4. Stagnant Australian business presence and investment in Asia
5. Chronic under-representation of Asian-Australians in the leadership of our institutions
6. Decline in our Asia competencies across the whole education system
Rise of Asia. Australia and Asia

TREND #1

World's 10 Largest Economies
Projected Real GDP (trillions of 2010 dollars)
1970

- United States: 4.8
- Japan: 1.9
- Germany: 1.5
- France: 1
- United Kingdom: 1
- Italy: 1
- Russia: 0.8
- Canada: 0.5
- Spain: 0.5
- Brazil: 0.4

Share of Global GDP by Country
1970

- United States: 25
- Japan: 9.8
- Germany: 8
- France: 5.5
- United Kingdom: 5.1
- Italy: 5
- Russia: 4.4
- Canada: 2.7
- Spain: 2.4
- Brazil: 2.4

Chart by Aron Strandberg
Twitter: @aronstrandberg
Source: U.S. Department of Agriculture
Rise of Asia. Australia and Asia

GDP (PPP) IN CURRENT INTERNATIONAL DOLLARS

Source: Contours of the World Economy, 1–2030 AD by Angus Maddison; converted from 1990 to current international dollars.
Rise of Asia. Australia and Asia

SIZE OF THE GLOBAL MIDDLE CLASS 2009 - 2030

Source: The Emerging Middle Class in Developing Countries, Brookings Institution, 2011

<table>
<thead>
<tr>
<th>Year</th>
<th>Asia Pacific</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>525 millions</td>
<td>72%</td>
</tr>
<tr>
<td>2020</td>
<td>1,740 millions</td>
<td>46%</td>
</tr>
<tr>
<td>2030</td>
<td>3,228 millions</td>
<td>34%</td>
</tr>
</tbody>
</table>

Asia Pacific share:
- 2009: 28%
- 2020: 54%
- 2030: 66%

Other share:
- 2009: 72%
- 2020: 46%
- 2030: 34%
Top 5 birth place of residents by state, based on author’s analysis of ABS Census 2016 Data

AUSTRALIA

Australia - 71.7%
England - 4.2%
New Zealand - 2.4%
China - 2.3%
India - 2.1%
Philippines - 1.1%
Vietnam - 1.0%
Italy - 0.8%
South Africa - 0.7%
Malaysia - 0.6%

Source: THE CHANGING FACE OF AUSTRALIA
Completing the shift to a Eurasian nation, by George Megalogenis, The Australian Foreign Affairs, October 2017
Rise of Asia. Australia and Asia

AUSTRALIAN POPULATION BORN OVERSEAS, 2016

Source: Australian Bureau of Statistics

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>14.7</td>
</tr>
<tr>
<td>New Zealand</td>
<td>8.4</td>
</tr>
<tr>
<td>Italy</td>
<td>4.1</td>
</tr>
<tr>
<td>China</td>
<td>8.3</td>
</tr>
<tr>
<td>India</td>
<td>7.4</td>
</tr>
<tr>
<td>Philippines</td>
<td>3.8</td>
</tr>
</tbody>
</table>

AIEC 2018
Rise of Asia. Australia and Asia

TREND #3: GEOPOLITICAL REBALANCE
How much do you trust the following countries to act responsibly in the world?

- **China**: A great deal: 90%, Not very much: 6%, Not at all: 4%
- **India**: A great deal: 90%, Not very much: 7%, Not at all: 3%
- **US**: A great deal: 84%, Not very much: 11%, Not at all: 5%
- **Japan**: A great deal: 94%, Not very much: 5%, Not at all: 1%
- **UK**: A great deal: 60%, Not very much: 33%, Not at all: 7%

AIEC 2018
China or the US: Which relationship is more important?

Source: Lowy Institute Poll 2017
**Rise of Asia. Australia and Asia**

**NON-TREND #1: STAGNANT BUSINESS ENGAGEMENT, 2017**

Australia’s top direct investment Destinations

- **US**: 21%
- **UK**: 13%
- **New Zealand**: 12%
- **China**: 2.4%
- **Hong Kong**: 1%
- **Singapore**: 4%
- **Other**: 47%

*Source: Australian Bureau of Statistics*
Rise of Asia. Australia and Asia

NON – TREND #2: ASIAN-AUSTRALIAN LEADERSHIP

Australian population 2016

- Anglo-Celtic: 58%
- European: 18%
- Non-European: 21%
- Indigenous: 3%

Senior leaders of Australian organizations

- Anglo-Celtic: 76%
- European: 19%
- Non-European: 5%
- Indigenous: 0.4%

CEOs

- Anglo-Celtic: 77%
- European: 20%
- Non-European: 3%
- Indigenous: 0.3%

Source: Leading for Change, A blueprint for cultural diversity and inclusive leadership revisited, April 2018
## Rise of Asia. Australia and Asia

### NON – TREND #2: ASIAN-AUSTRALIAN LEADERSHIP

Cultural backgrounds of Australia’s senior leaders (in percentage terms)

<table>
<thead>
<tr>
<th>Position</th>
<th>Indigenous</th>
<th>Anglo-Celtic</th>
<th>European</th>
<th>Non-European</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASX 200 (CEOs)</td>
<td>0</td>
<td>76.62</td>
<td>18.41</td>
<td>4.98</td>
</tr>
<tr>
<td>Federal parliament (MPs and Senators)</td>
<td>1.77</td>
<td>78.76</td>
<td>15.93</td>
<td>3.54</td>
</tr>
<tr>
<td>Federal ministry (Ministers and Assistant Ministers)</td>
<td>2.38</td>
<td>85.71</td>
<td>11.90</td>
<td>0</td>
</tr>
<tr>
<td>Federal and state public service (Secretaries and heads of departments)</td>
<td>0.81</td>
<td>82.26</td>
<td>15.32</td>
<td>1.61</td>
</tr>
<tr>
<td>Universities (Vice-chancellors)</td>
<td>0</td>
<td>85.00</td>
<td>15.00</td>
<td>0</td>
</tr>
</tbody>
</table>
International Students – key contributor’s to Australia’s engagement with Asia
International students

AUSTRALIA INTERNATIONAL ENROLMENTS, JUN 2018

645,064

That’s a big number

Sources: Exporting income from Australian Bureau of Statistics, 2018; The international Enrolments from Australian Education International, 2018; Value added data from Deloitte Access Economics, 2016
The top 5 countries are China, India, Nepal, Malaysia and Vietnam.

Students from these regions have almost a fixed proportion since 2002.

Source: Australian Education International
International Students by Study Level

DET HIGHER EDUCATION STATISTICS, 2017

### PhD
- **Domestic**: 58%
- **International**: 42%

### Postgraduate Coursework
- **Domestic**: 57%
- **International**: 43%

### Undergraduate Coursework
- **Domestic**: 85%
- **International**: 15%
International Students

HOW DID WE GET HERE
FROM COLOMBO PLAN TO NEW COLOMBO PLAN

International Students Enrolments

Source: Australian Education International, April 2018; Data before 2002 are from The changing structure of higher education in Australia, 1949-2003
In 2016 the international education sector supported 128,000 FTE jobs, equivalent to 1.3% of employed persons in Australia.

$27.8 bn Export earnings
Total income from providing international education services in 2017

>$5 bn Living expenses
In 2016 international students contributed an estimated $5B on intermediate inputs

>$12 bn Output generated
The direct economic contribution (GDP) of the sector 2014 - 2015

Sources: Exporting income from Australian Bureau of Statistics, 2018; The international Enrolments from Australian Education International, 2018; Value added data from Deloitte Access Economics, 2016;
International students
ALIGNMENT BETWEEN INTERNATIONAL ENROLMENTS AND THE LABOUR MARKET?

Study v.s Demand

International Enrolments by Broad Field

Management and Commerce 41%
Society and Culture 23%
Information Technology 8%
Engineering and Related Technologies 8%
Health 6%
Other 14%

Management and Commerce 12%
Food, Hospitality and Personal Services 34%
Natural and Physical Sciences 12%
Health 10%
Information Technology 9%
Other 23%

Sources: Australian Education International, April 2018;
Australian Government Department of Home Affairs, June 2018
AIEC 2018
International Students

NSW ALUMNI FOOTPRINT ON LINKEDIN
(EXCLUDING AUSTRALIA)

Source: Linkedin Alumni Tool; All graduates from NSW universities recorded on LinkedIn
New migrants by area 2016-17

- 0 - 500
- 500 - 1000
- 1000 - 1500
- 1500 - 2000
- 2000 - 2500
- 2500+

Sources: Australian Bureau of Statistics
## HAVE OUR FOOD TASTES CHANGED?

### Melbourne 2018 # of Restaurants
- Café 449
- Italian 333
- Chinese 231
- Thai 214
- Japanese 190
- European 190
- Indian 109
- Seafood 88
- Steakhouse 37

### Brisbane 2018 # of Restaurants
- Café 517
- Italian 211
- Chinese 209
- Thai 200
- Indian 191
- Seafood 186
- Japanese 176
- European 70
- Steakhouse 55

### Sydney 2018 # of Restaurants
- Café 632
- Italian 442
- Thai 289
- Japanese 287
- Chinese 285
- European 216
- Seafood 176
- Indian 121
- Steakhouse 36

### Sydney 2010 # of Restaurants
- Café 116
- Italian 273
- Thai 195
- Japanese 135
- Chinese 219
- European 111
- Seafood 139
- Indian 133
- Steakhouse 32

Source: TripAdvisor

AIEC 2018
International students
IMPACT ON OUR TRAVEL PATTERNS?

2017
New Zealand, Indonesia, USA, UK, Thailand, China, Singapore, Japan, India, Fiji

1990 - 2000
Indonesia, New Zealand, USA, UK, Thailand, Fiji, Malaysia, Singapore, Hong Kong, Italy

1980 - 1990
USA, UK, Indonesia, New Zealand, Fiji, Thailand, Singapore, Hong Kong, Malaysia, Greece

Source: Australian Bureau of Statistics
AIEC 2018
International Students

OUTBOUND MOBILITY AND LANGUAGES IN SCHOOLS, 2016-17

Top primary destination for outbound mobility
From 38 AUIDF participating universities

USA
UK
China
Italy
India

Top 3 languages taught in schools
By state or territory

Top 10 in Australia overall
1. Japanese
2. French
3. German
4. Mandarin
5. Indonesian
6. Italian
7. Greek
8. Vietnamese
9. Spanish
10. Arabic

Sources: AUIDF, 2016; The Conversation, 2017
International Students

ARE WE LEARNING ASIAN LANGUAGES?

NSW Asian language HSC students (secondary language)
International students

AUSTRALIA MONTHLY ACTIVE USERS

<table>
<thead>
<tr>
<th>Platform</th>
<th>Monthly Active User (millions, Sep 2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td>YouTube</td>
<td>15.7</td>
</tr>
<tr>
<td>Facebook</td>
<td>14.8</td>
</tr>
<tr>
<td>Instagram</td>
<td>11.5</td>
</tr>
<tr>
<td>Snapchat</td>
<td>9.4</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>7.1</td>
</tr>
<tr>
<td>Twitter</td>
<td>6.5</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>4.0</td>
</tr>
<tr>
<td>Tumblr</td>
<td>3.6</td>
</tr>
<tr>
<td>Tinder</td>
<td>3.2</td>
</tr>
<tr>
<td>WeChat</td>
<td>3.0</td>
</tr>
<tr>
<td>TripAdvisor</td>
<td>2.5</td>
</tr>
<tr>
<td>Yelp</td>
<td>2.0</td>
</tr>
<tr>
<td>Blogspot</td>
<td>1.6</td>
</tr>
<tr>
<td>Flickr</td>
<td>1.5</td>
</tr>
<tr>
<td>Pinterest</td>
<td>1.3</td>
</tr>
<tr>
<td>Reddit</td>
<td>1.0</td>
</tr>
<tr>
<td>Renren</td>
<td>0.7</td>
</tr>
<tr>
<td>MySpace</td>
<td>0.3</td>
</tr>
<tr>
<td>Google Plus</td>
<td>0.2</td>
</tr>
<tr>
<td>StumbleUpon</td>
<td>0.2</td>
</tr>
<tr>
<td>Weibo</td>
<td>0.3</td>
</tr>
</tbody>
</table>

Source: Vivid Social
Beyond migrants
THE ARTS

Sources: Actors data: 2011-2015 data are from Screen Australia 2016; 1992 and 1999 data are from May, Harvey 1999, Broadcast in Colour: Cultural Diversity and Television Programming in Four Countries, Australian Film Commission
Beyond migrants

THE ARTS

[Images of movie posters]
Beyond migrants

THE ARTS

Detective Chinatown

Dying to Survive
### Festivals Celebrated

#### Number before 2006
- **Music/Film**: 20
- **Arts General**: 17
- **Cultural**: 11
- **Food**: 5
- **General Arts**: 1
- **Sports**: 1

#### Number after 2006
- **Music/Film**: 36
- **Arts General**: 21
- **Cultural**: 17
- **Food**: 11
- **Sports**: 5

Sources: Census data from Australian Bureau of Statistics; Festival data from Wikipedia
How to create a new narrative and maximise the benefits of International students to Australia
International students: New narrative

1. Nuance and balance: beyond export economics

2. People first: human-centered approach is needed

3. Whole-of-Australia project: it’s bigger than the education sector

4. Soft Power: international students are our best ambassadors
Questions ?