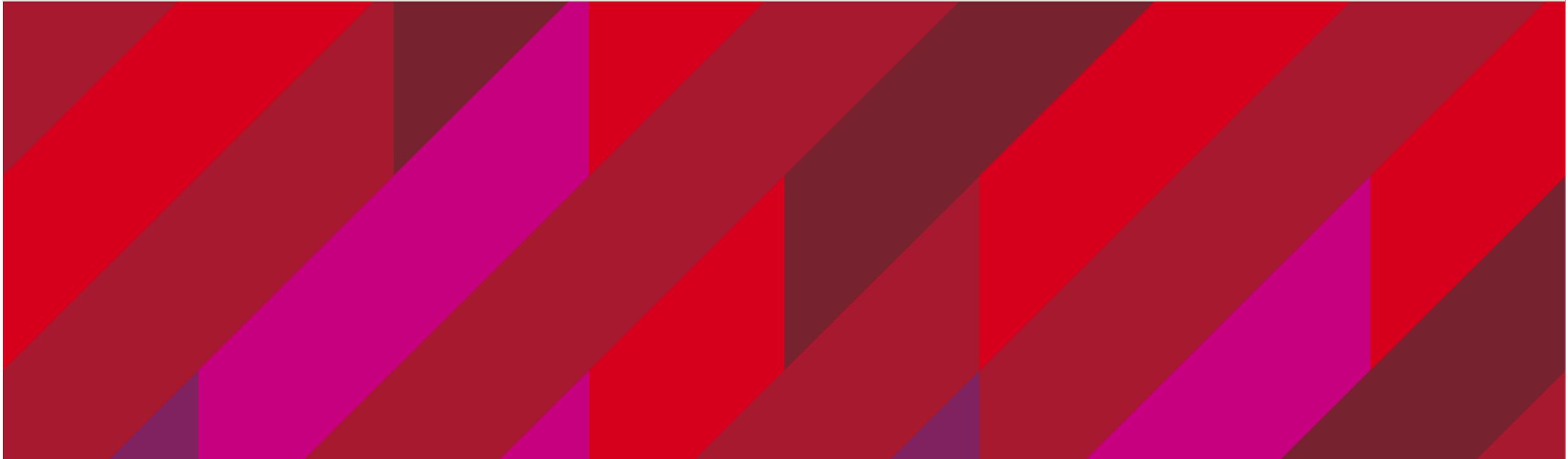


International students in Australia beyond dollars, migrants and spies

NICOLE BRIGG & PHILIPP IVANOV

AIEC 2018



Structure of the presentation



- 1** Rise of Asia. Australia and Asia – 3 trends, 3 counter-trends
- 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

AUSTRALIA DISRUPTED: TRENDS VS COUNTER - TRENDS

TRENDS

Asia's economic ascendancy



Changing Australian society



Asia's geopolitical rebalance



COUNTER-TRENDS

Stagnant Australian business presence and investment in Asia



Chronic under-representation of Asian-Australians in the leadership of our institutions



Decline in our Asia competencies across the whole education system



TREND #1

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



Chart by Aron Strandberg
 Twitter: @aronstrandberg
 Source: U.S. Department of Agriculture

Share of Global GDP by Country
 1970

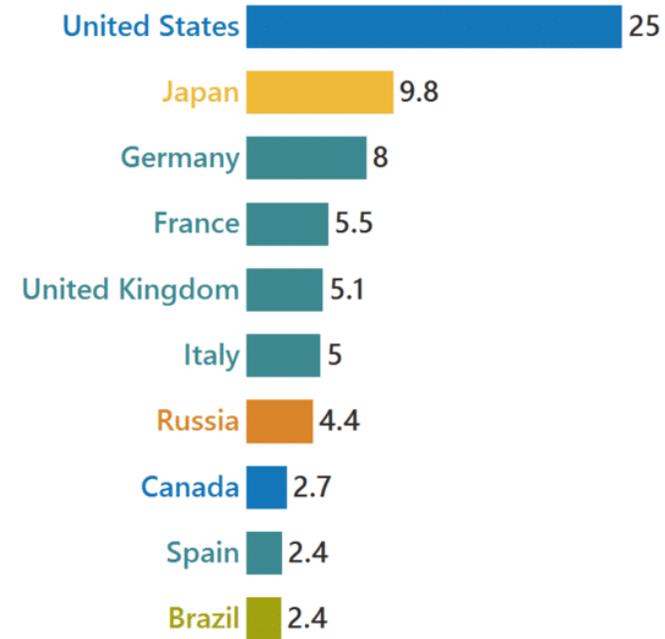
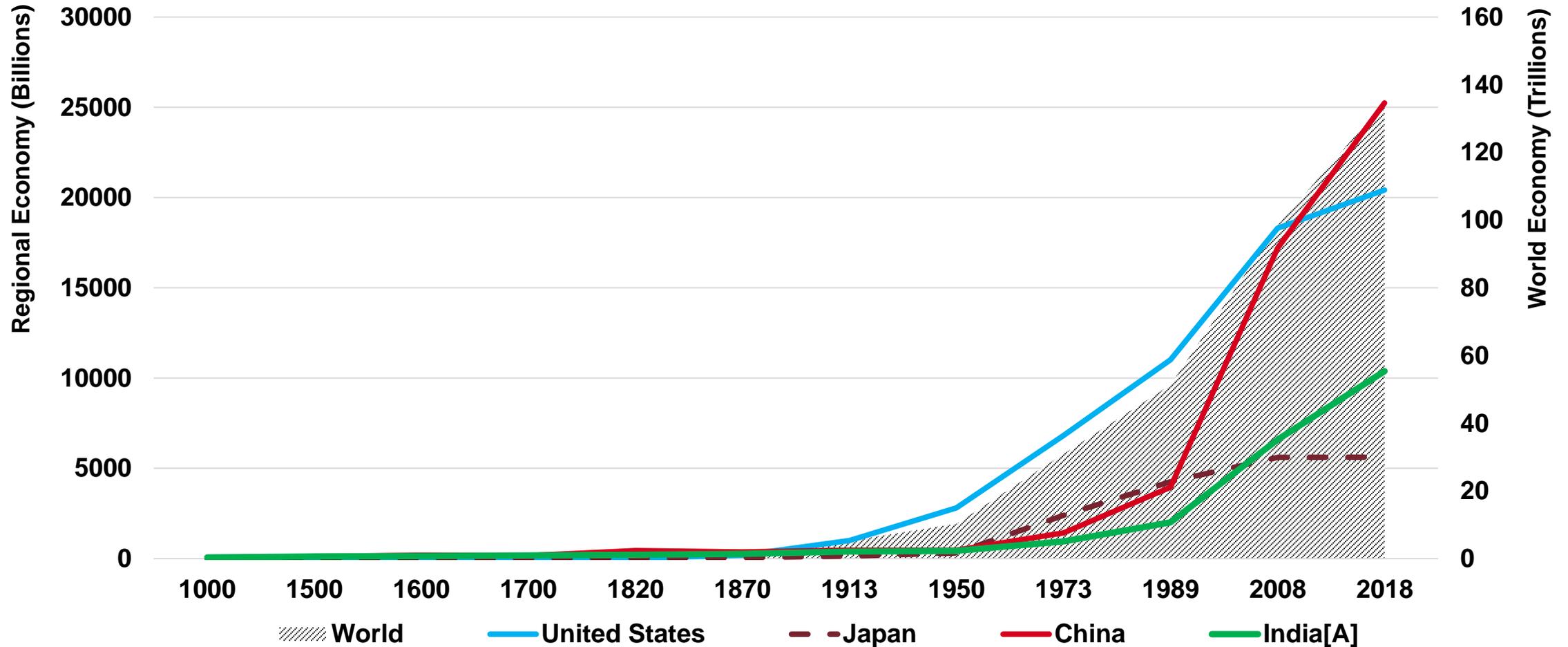


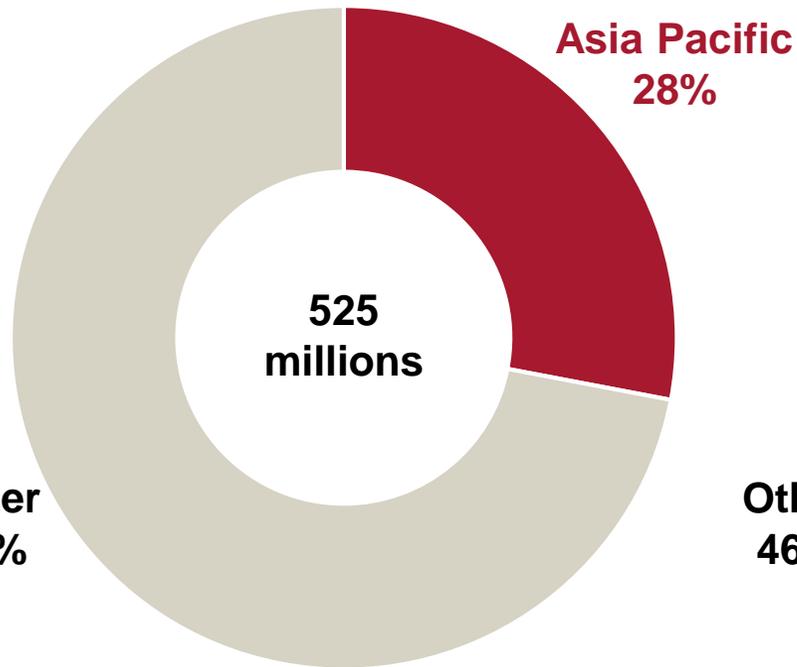
Chart by Aron Strandberg
 Twitter: @aronstrandberg
 Source: U.S. Department of Agriculture

GDP (PPP) IN CURRENT INTERNATIONAL DOLLARS

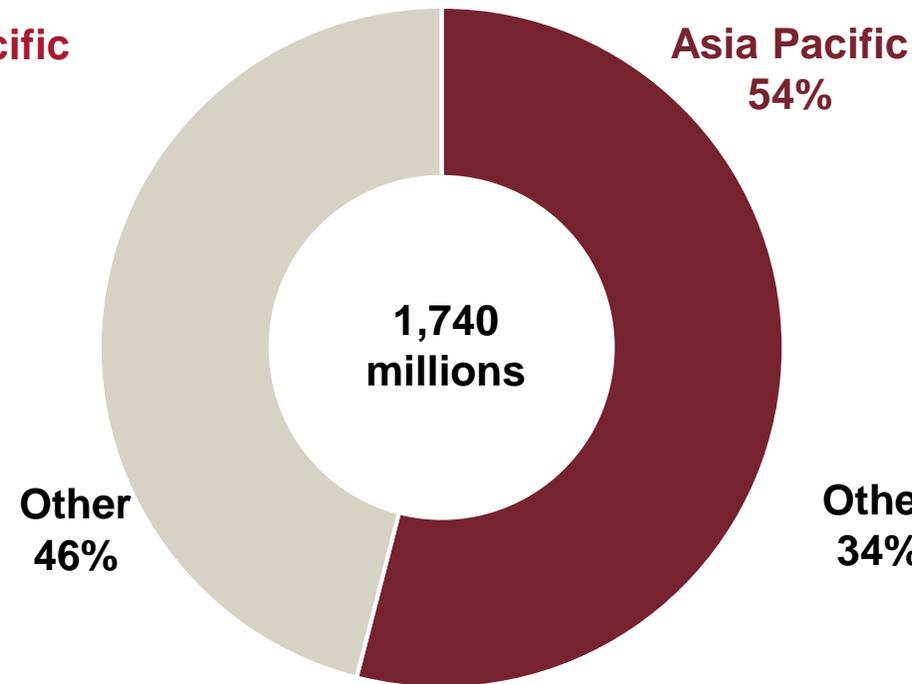


SIZE OF THE GLOBAL MIDDLE CLASS 2009 - 2030

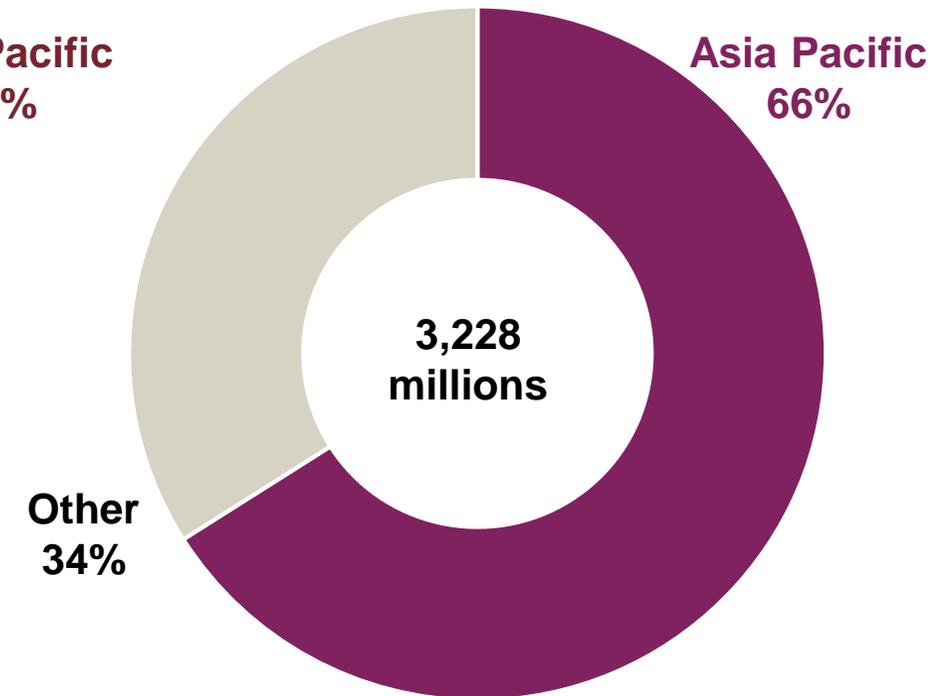
2009



2020



2030

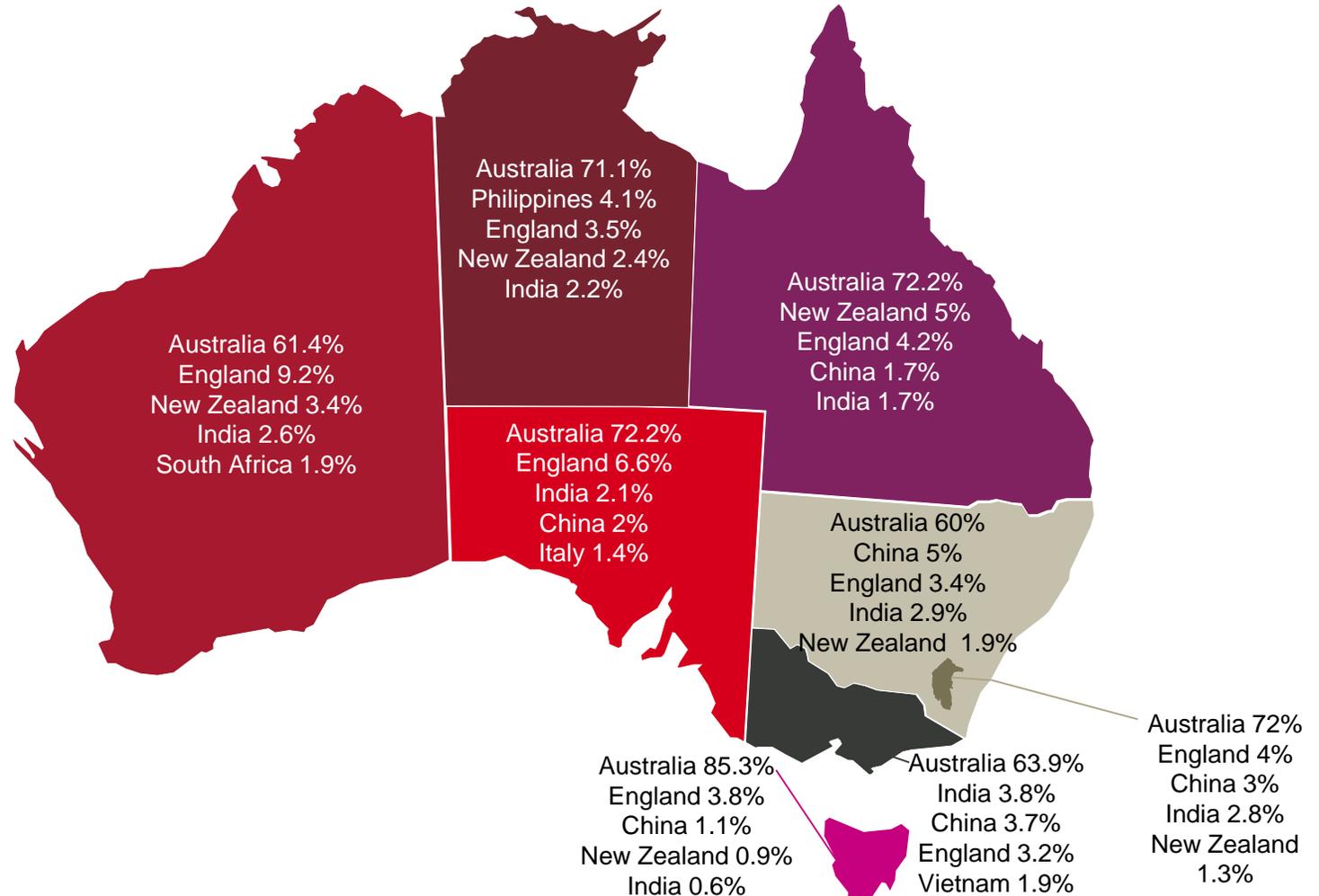


TREND #2: CHANGING AUSTRALIA SOCIETY, 2016

Top 5 birth place of residents by state, based on author's analysis of ABS Census 2016 Data

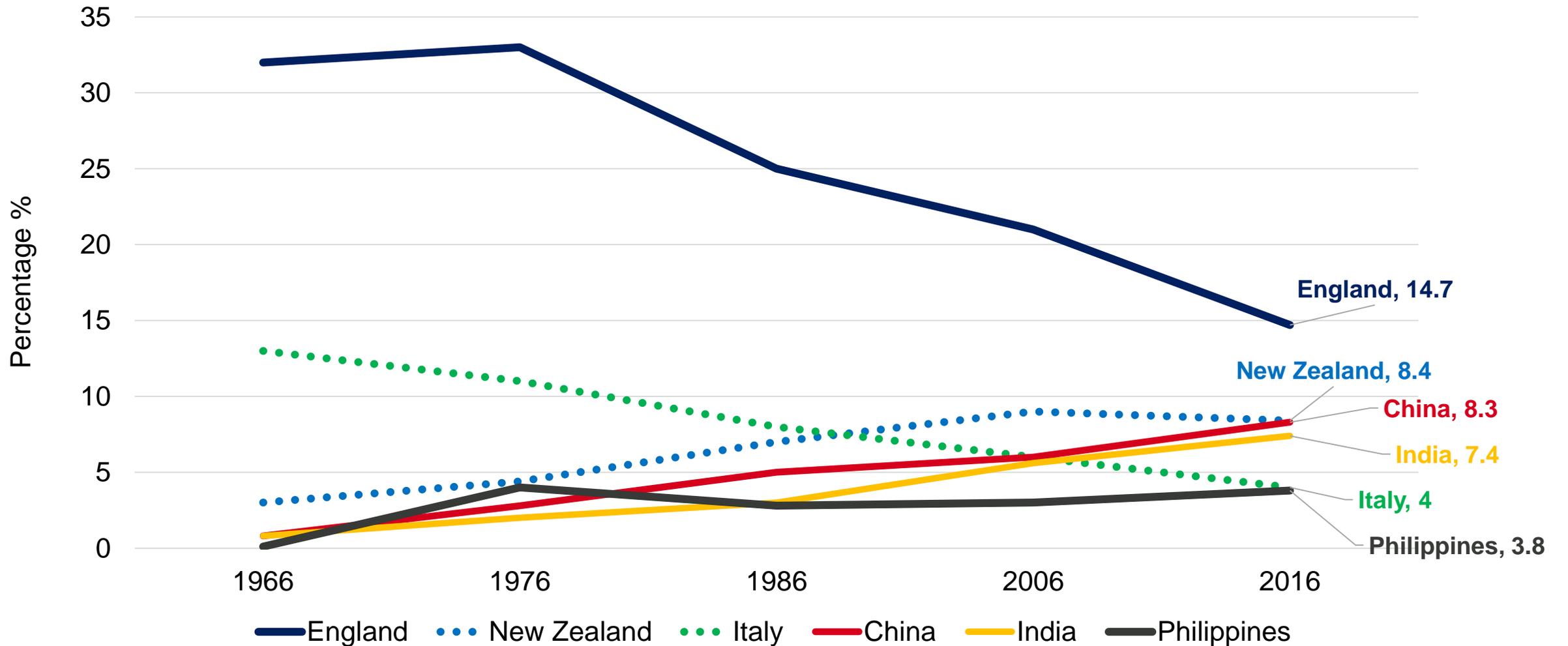
AUSTRALIA

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%



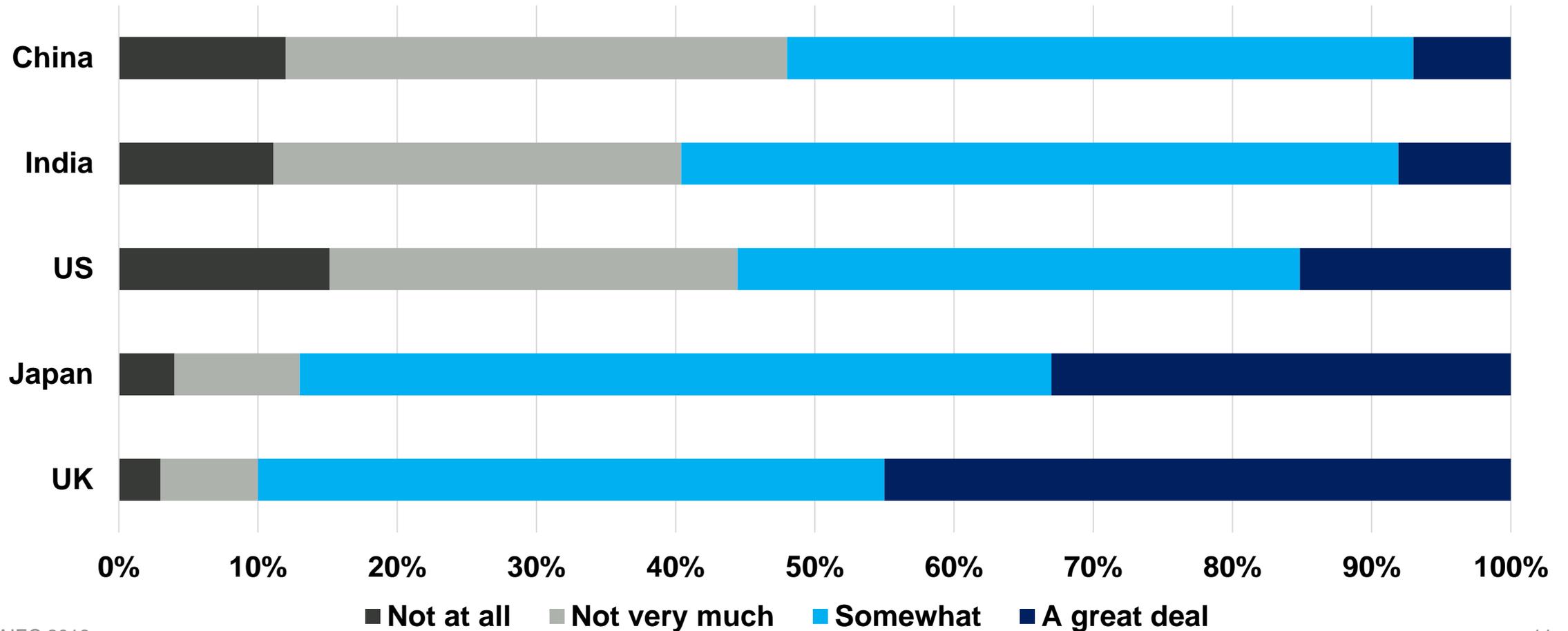
Source: THE CHANGING FACE OF AUSTRALIA
 Completing the shift to a Eurasian nation, by
 George Megalogenis, The Australian Foreign Affairs, October 2017

AUSTRALIAN POPULATION BORN OVERSEAS, 2016



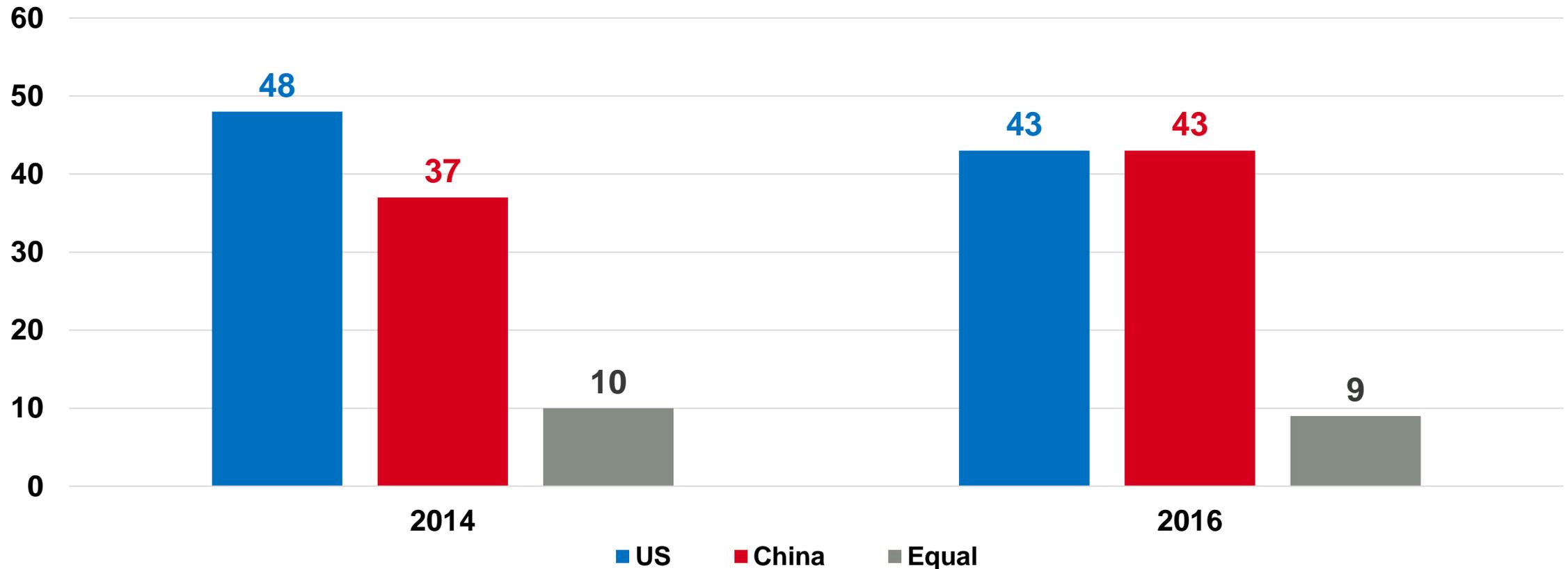
TREND #3: GEOPOLITICAL REBALANCE, 2017

How much do you trust the following countries to act responsibly in the world?



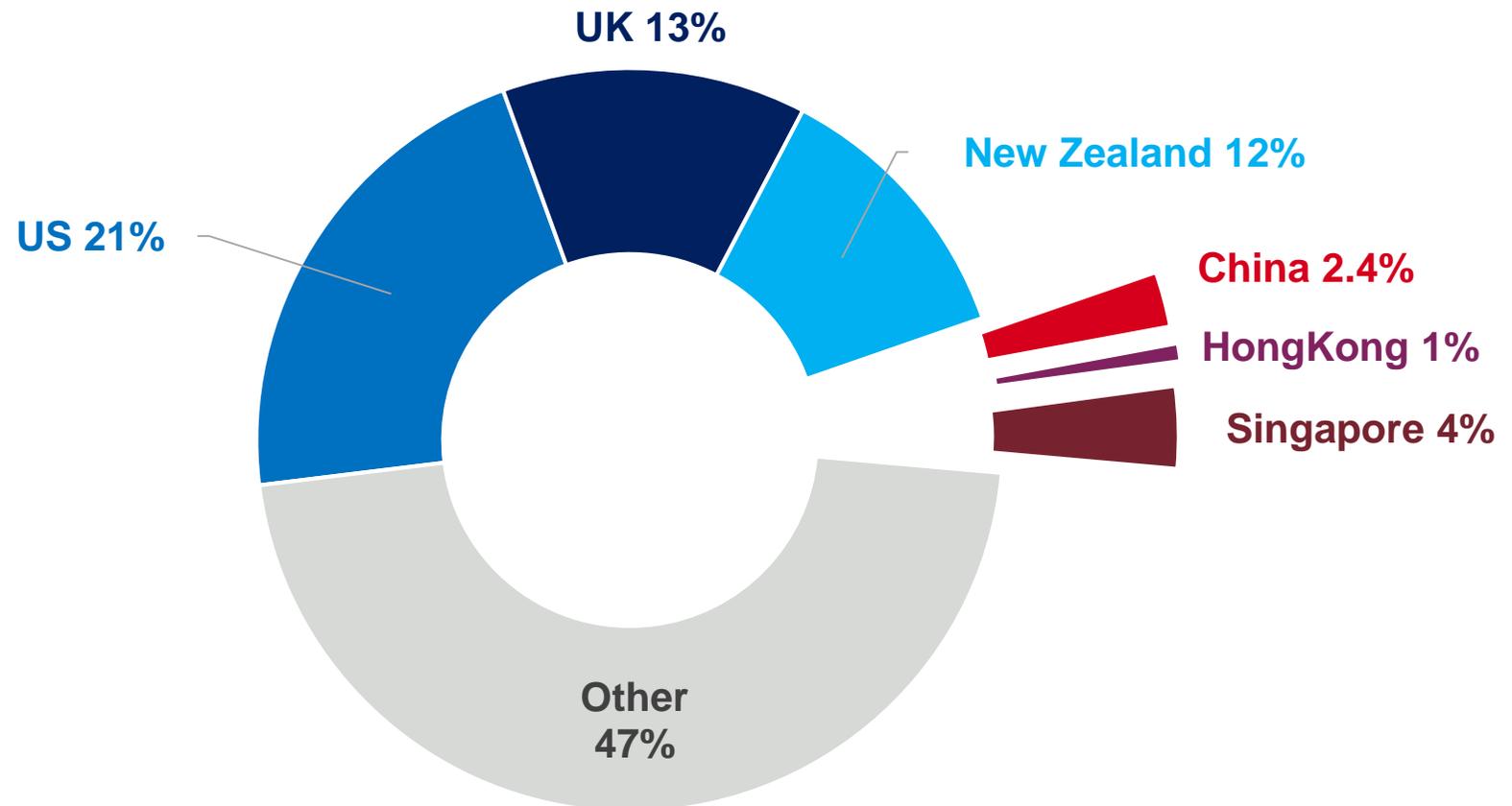
TREND #3: GEOPOLITICAL REBALANCE, 2017

China or the US: Which relationship is more important?



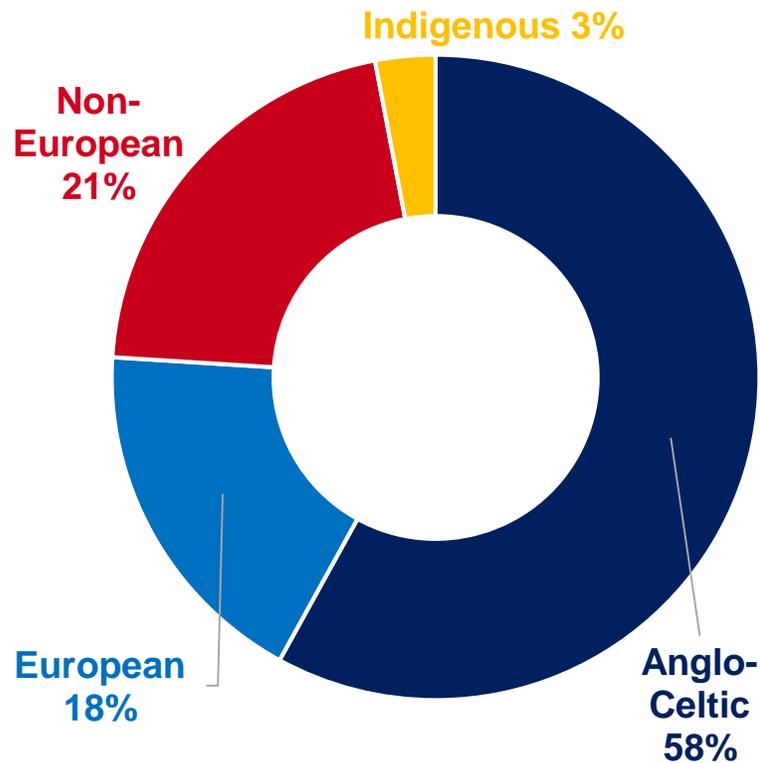
NON-TREND #1: STAGNANT BUSINESS ENGAGEMENT, 2017

Australia's top direct investment Destinations

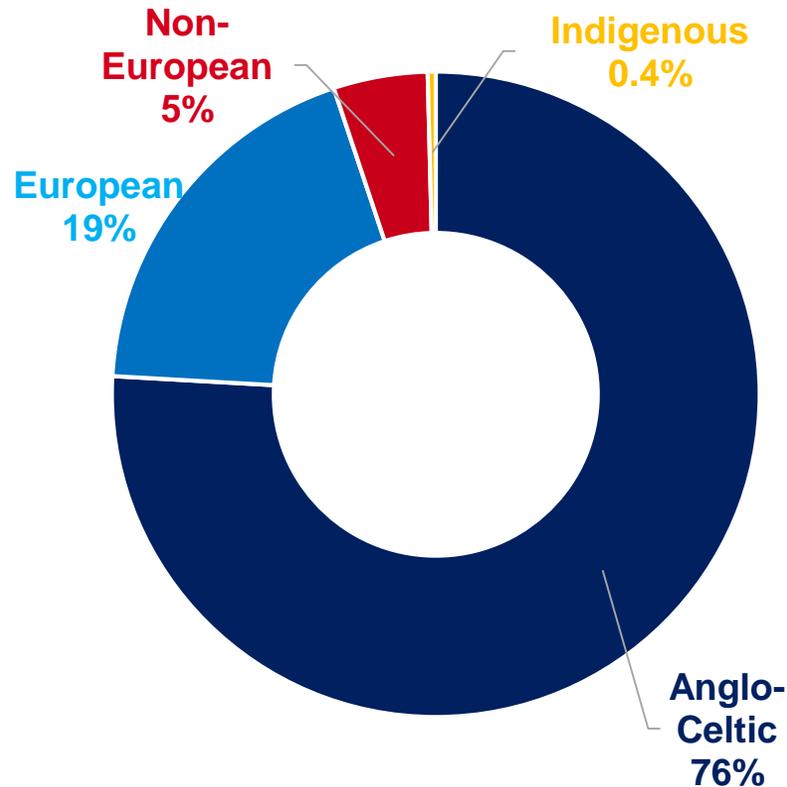


NON – TREND #2: ASIAN-AUSTRALIAN LEADERSHIP

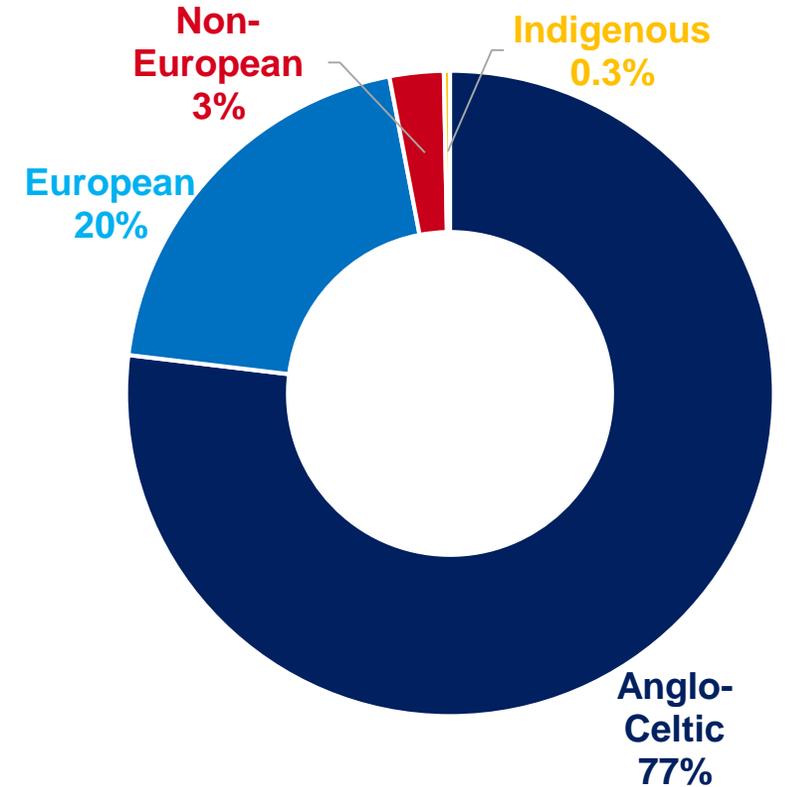
Australian population 2016



Senior leaders of Australian organizations



CEOs



NON – TREND #2: ASIAN-AUSTRALIAN LEADERSHIP

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

	Indigenous	Anglo-Celtic	European	Non-European
ASX 200 (CEOs)	0	76.62	18.41	4.98
Federal parliament (MPs and Senators)	1.77	78.76	15.93	3.54
Federal ministry (Ministers and Assistant Ministers)	2.38	85.71	11.90	0
Federal and state public service (Secretaries and heads of departments)	0.81	82.26	15.32	1.61
Universities (Vice-chancellors)	0	85.00	15.00	0



2

International Students – key contributor's to Australia's engagement with Asia

AUSTRALIA INTERNATIONAL ENROLMENTS, JUN 2018

6445,064

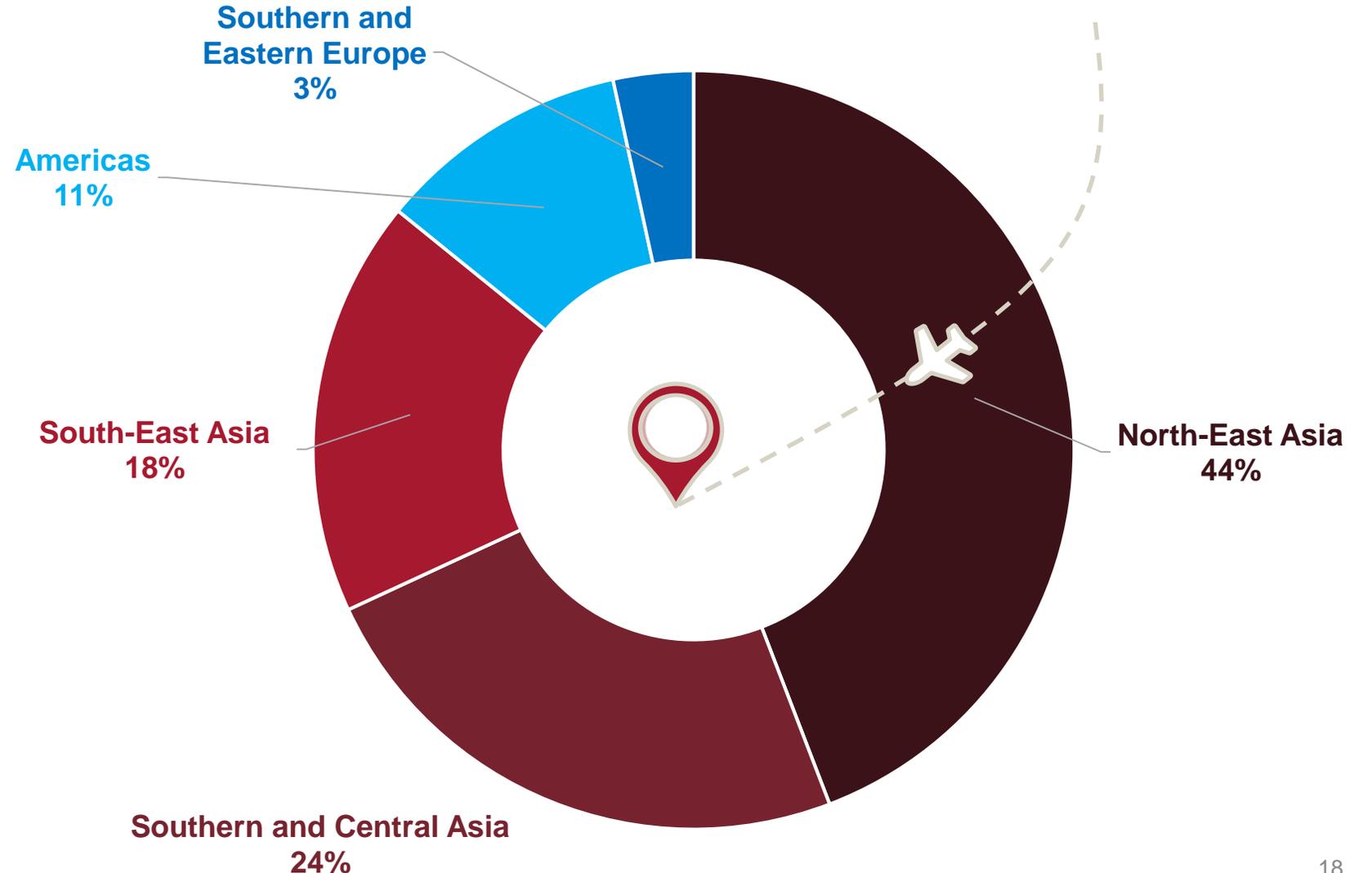
That's a big number

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

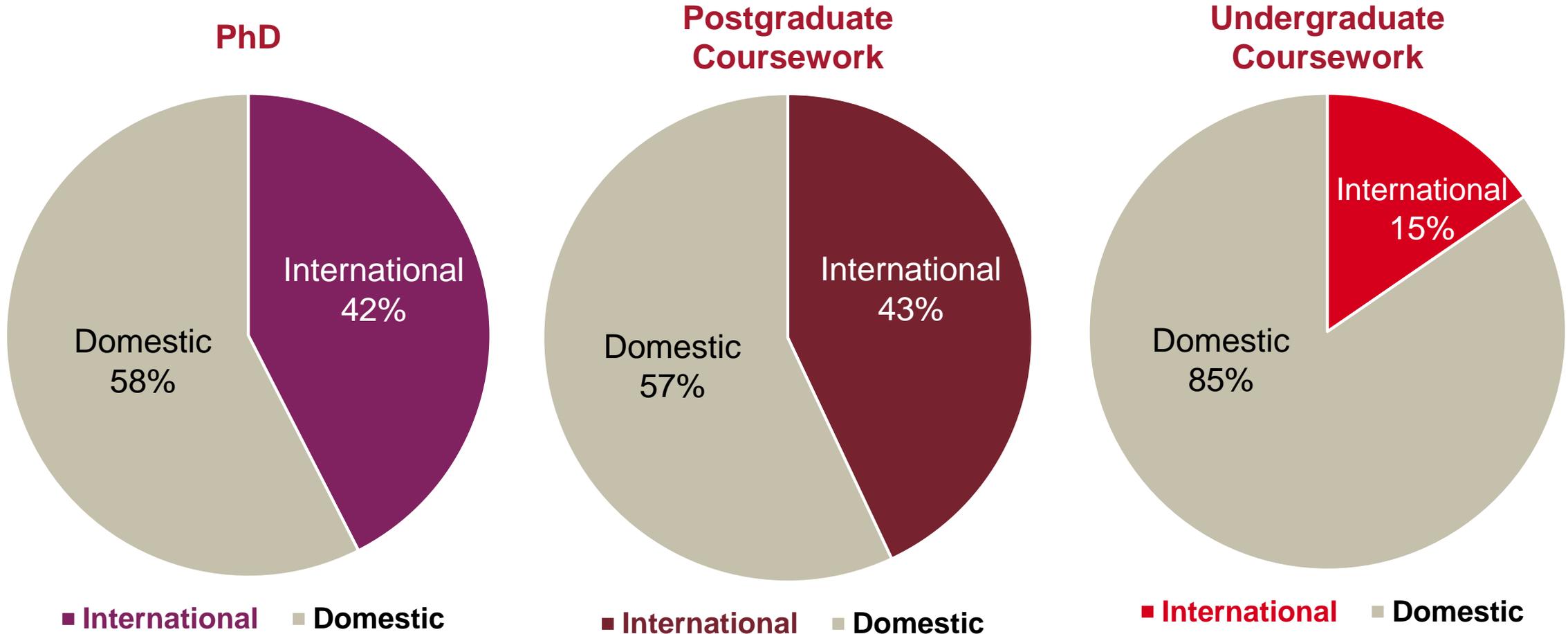
TOP 5 REGIONS AND COUNTRIES BY INTERNATIONAL ENROLMENTS, JUN 2018

The top 5 countries are
**China, India, Nepal,
Malaysia and Vietnam.**

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

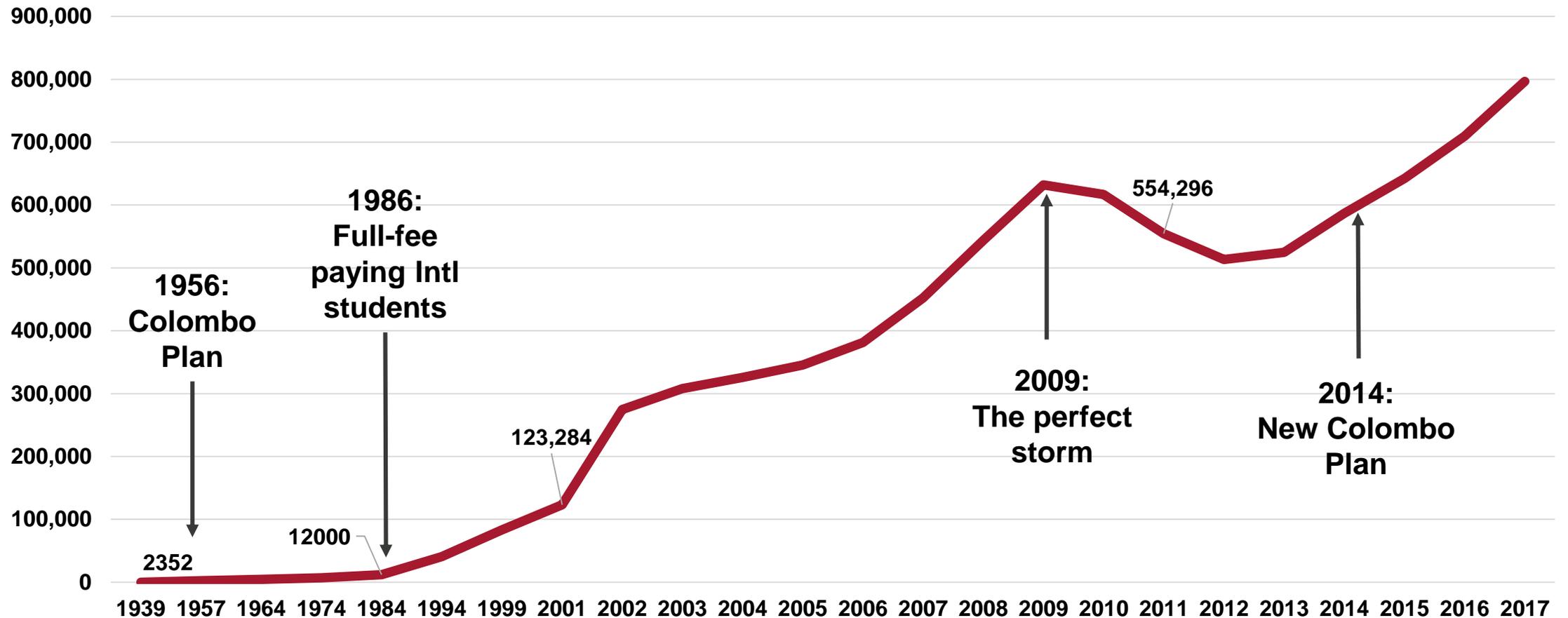


DET HIGHER EDUCATION STATISTICS, 2017



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

International Students Enrolments



HIGHER EDUCATION ECONOMIC PERSPECTIVE

\$27.8 bn Export earnings

Total income from providing international education services in 2017

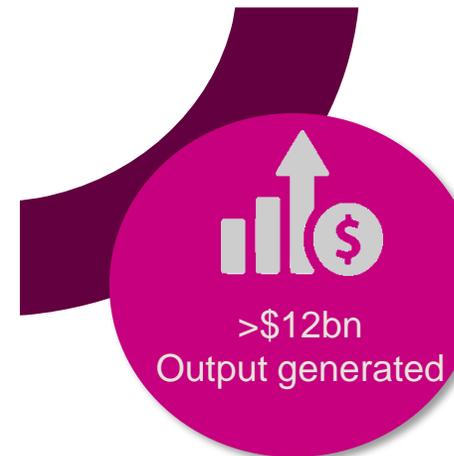


128,000 Jobs Generated

In 2016 the international education sector supported 128,000 FTE jobs, equivalent to 1.3% of employed persons in Australia

>\$5 bn Living expenses

In 2016 international students contributed an estimated \$5B on intermediate inputs

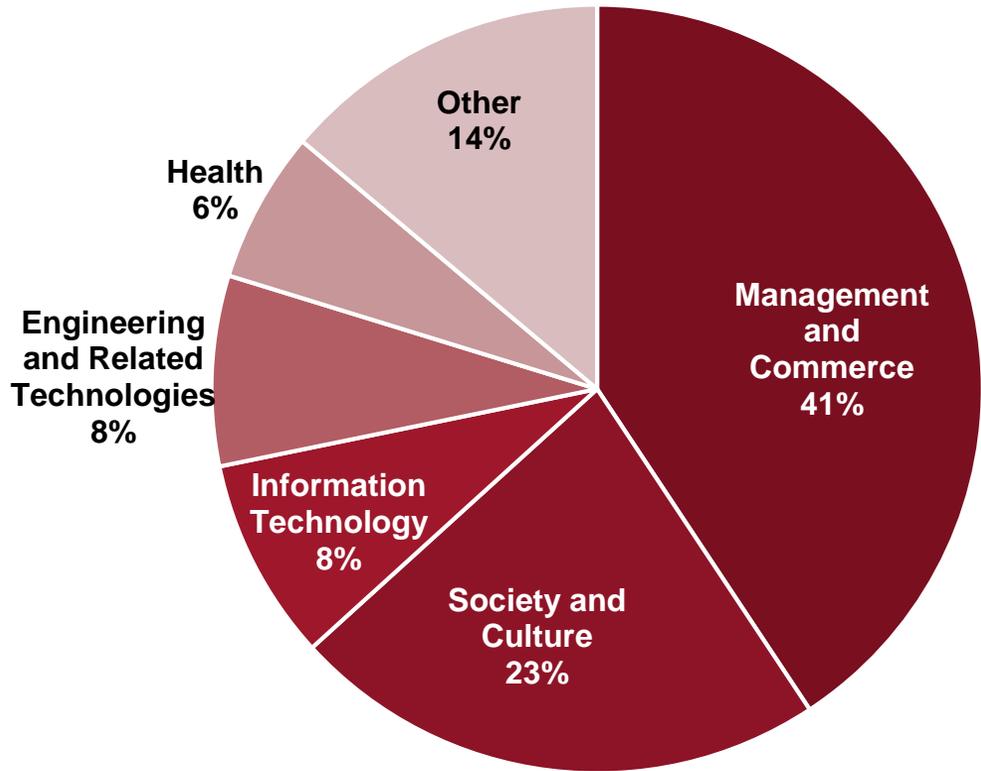


>\$12 bn Output generated

The direct economic contribution (GDP) of the sector 2014 - 2015

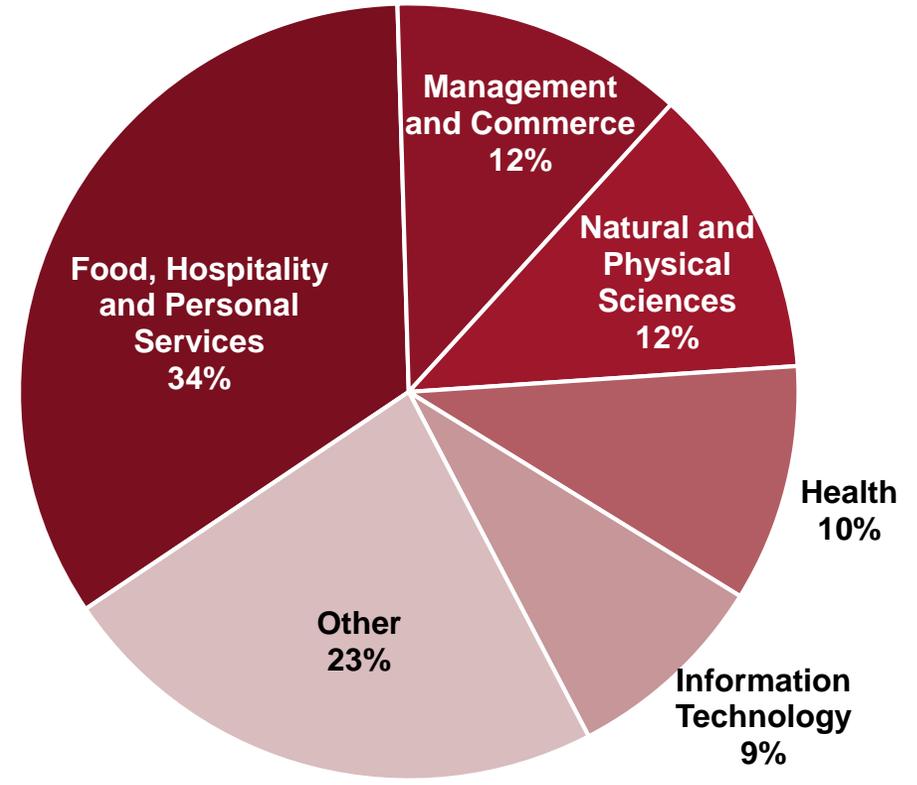
Sources: Exporting income from Australian Bureau of Statistics, 2018; The international Enrolments from Australian Education International, 2018; Value added data from Deloitte Access Economics, 2016;

ALIGNMENT BETWEEN INTERNATIONAL ENROLMENTS AND THE LABOUR MARKET?



International Enrolments by Broad Field

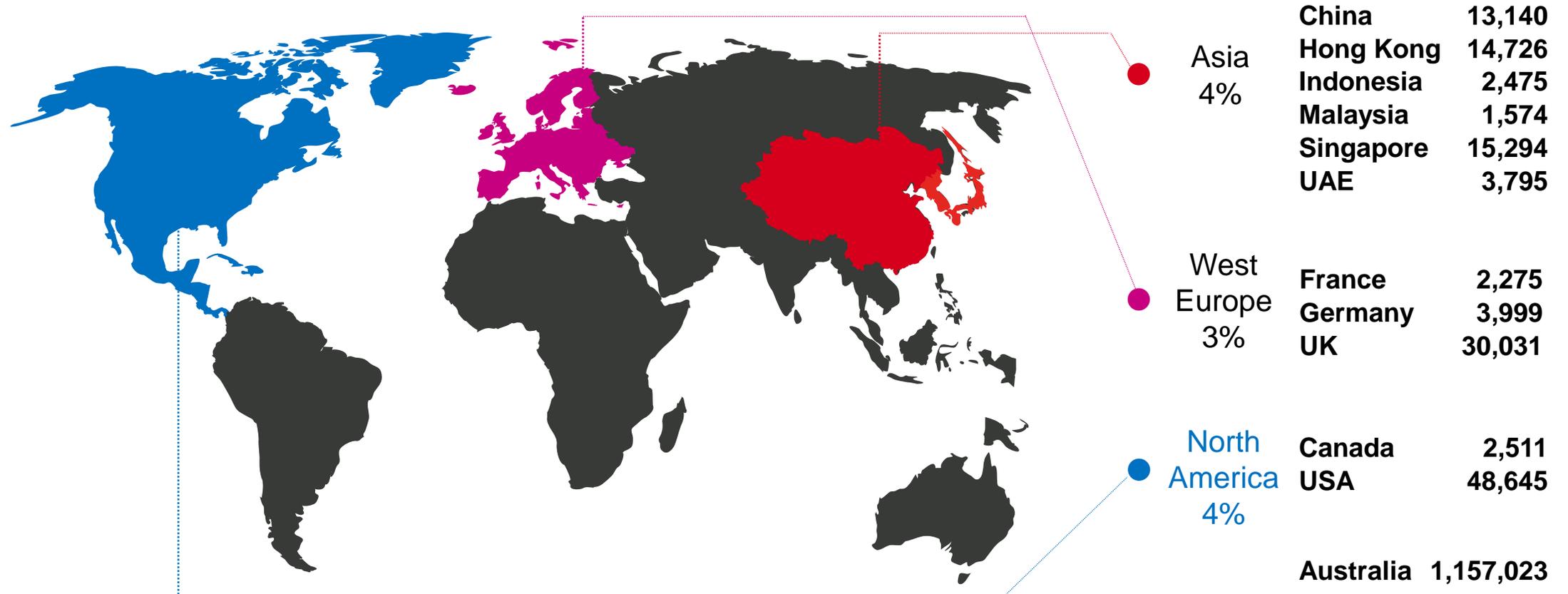
**Study
v.s
Demand**



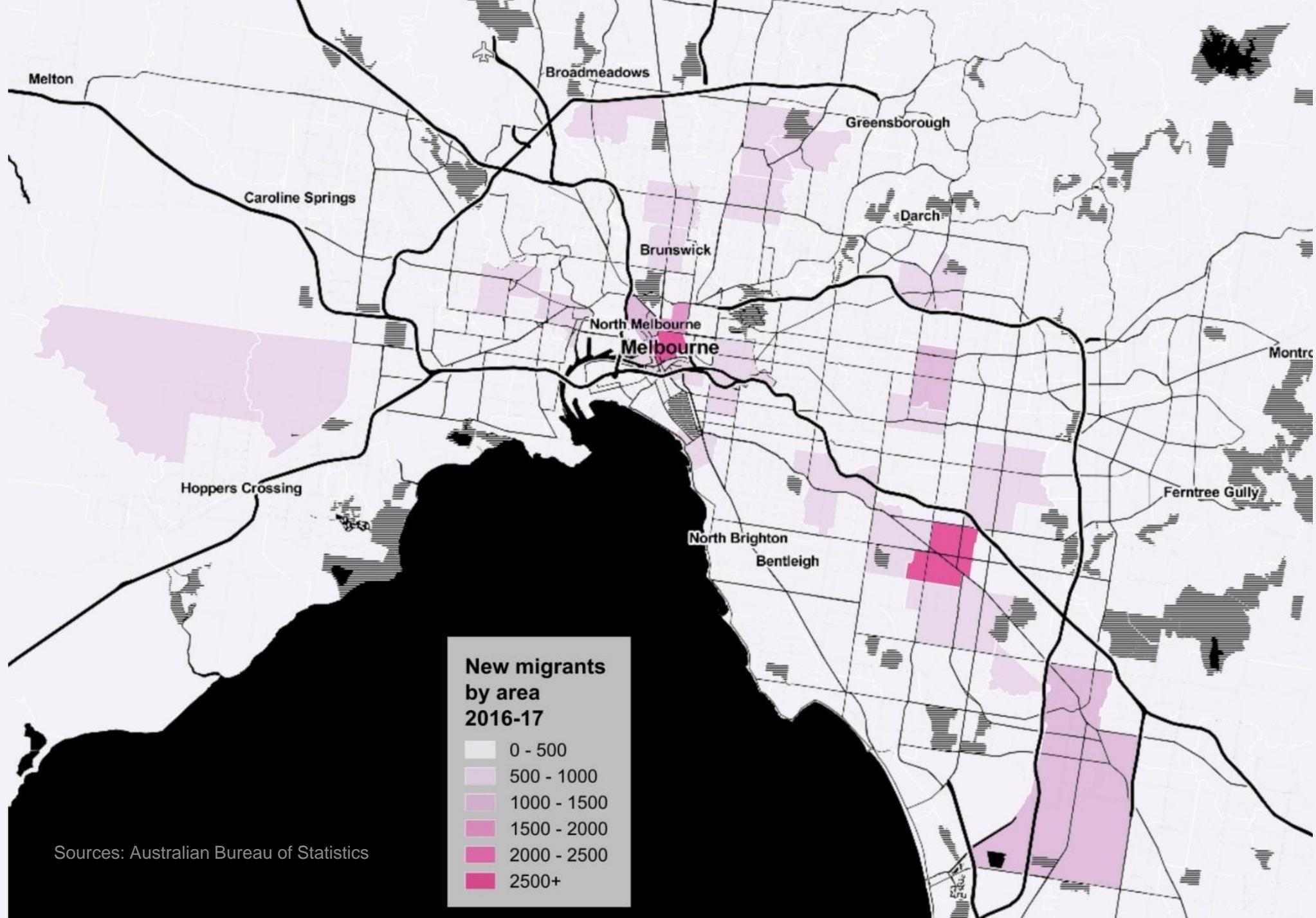
457 Visa Grant

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

NSW ALUMNI FOOTPRINT ON LINKEDIN (EXCLUDING AUSTRALIA)



Source: LinkedIn Alumni Tool; All graduates from NSW universities recorded on LinkedIn



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

- 116
- 273
- 195
- 135
- 219
- 111
- 139
- 133
- 32



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



OUTBOUND MOBILITY AND LANGUAGES IN SCHOOLS, 2016-17

Top primary destination for outbound mobility

From 38 AUIDF participating universities

USA 

UK 

China 

Italy 

India 

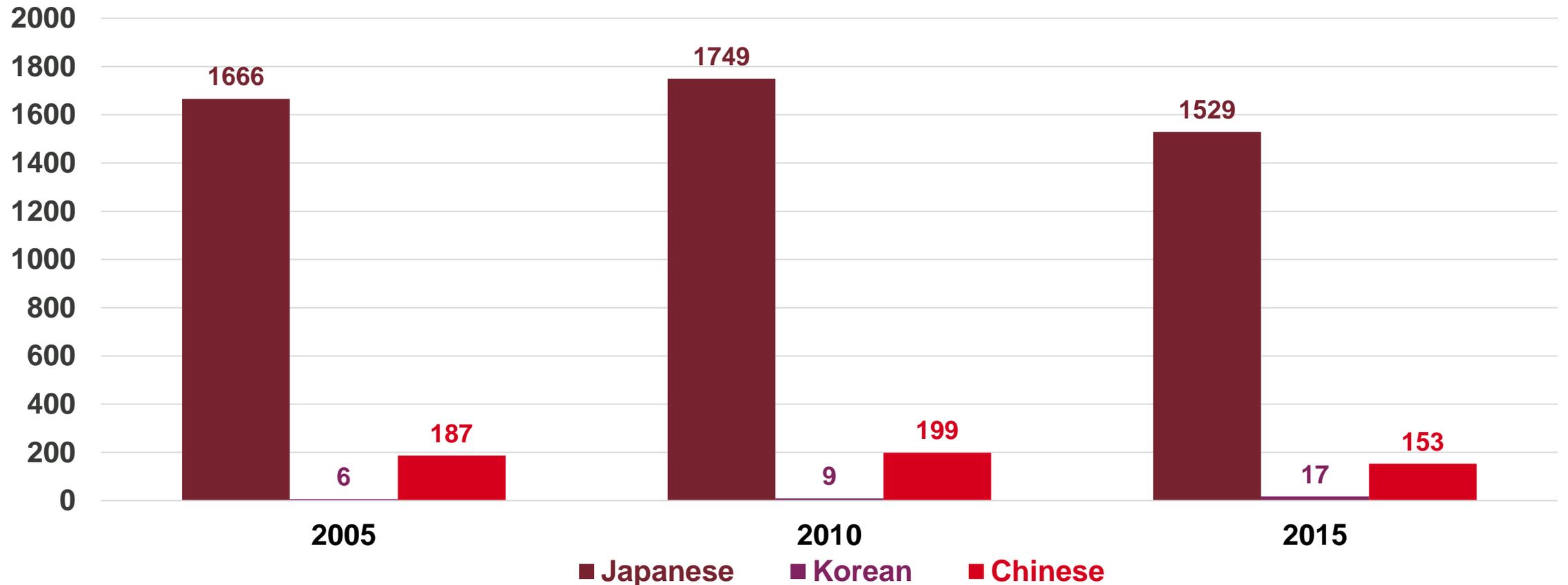
Top 3 languages taught in schools

By state or territory

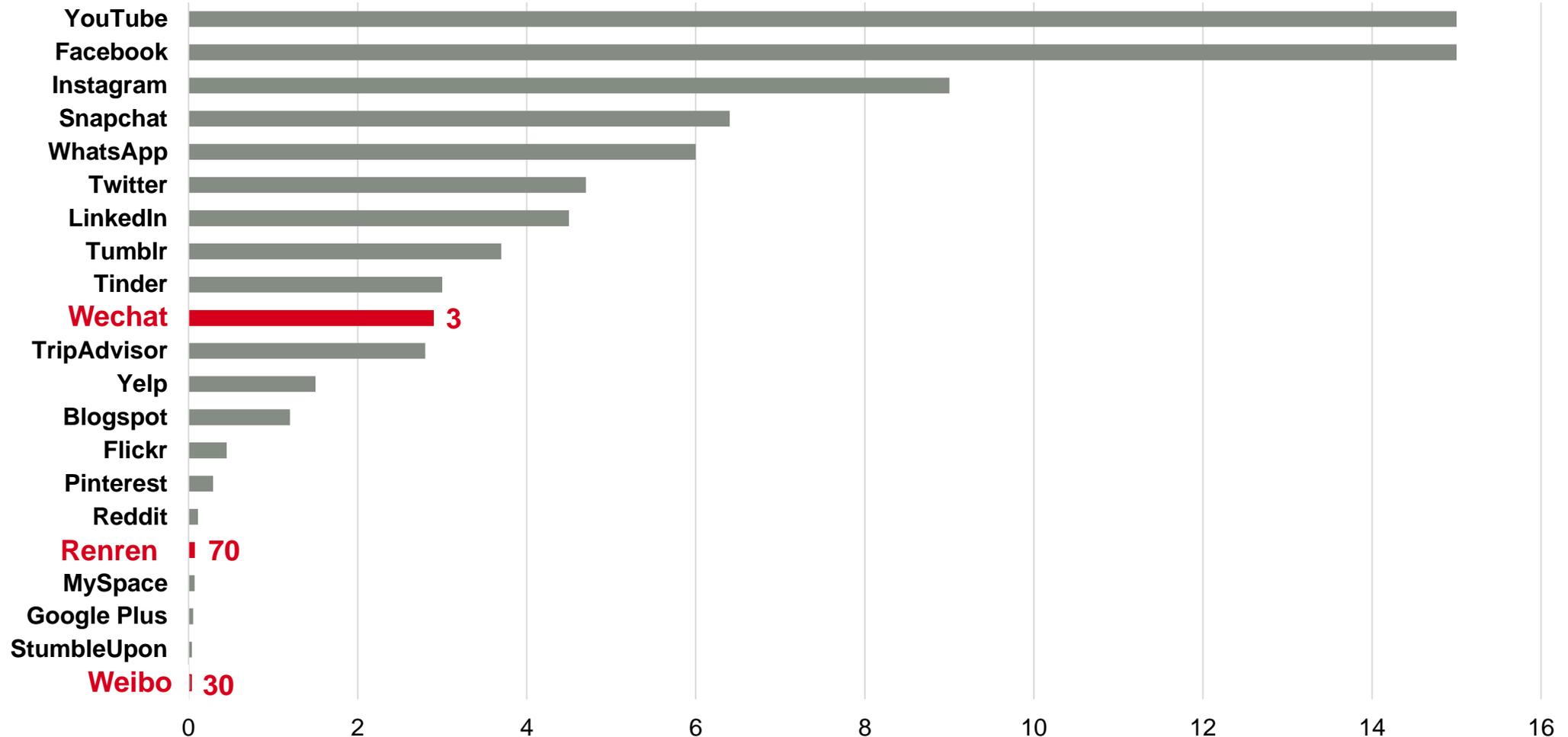


ARE WE LEARNING ASIAN LANGUAGES?

NSW Asian language HSC students (secondary language)



AUSTRALIA MONTHLY ACTIVE USERS

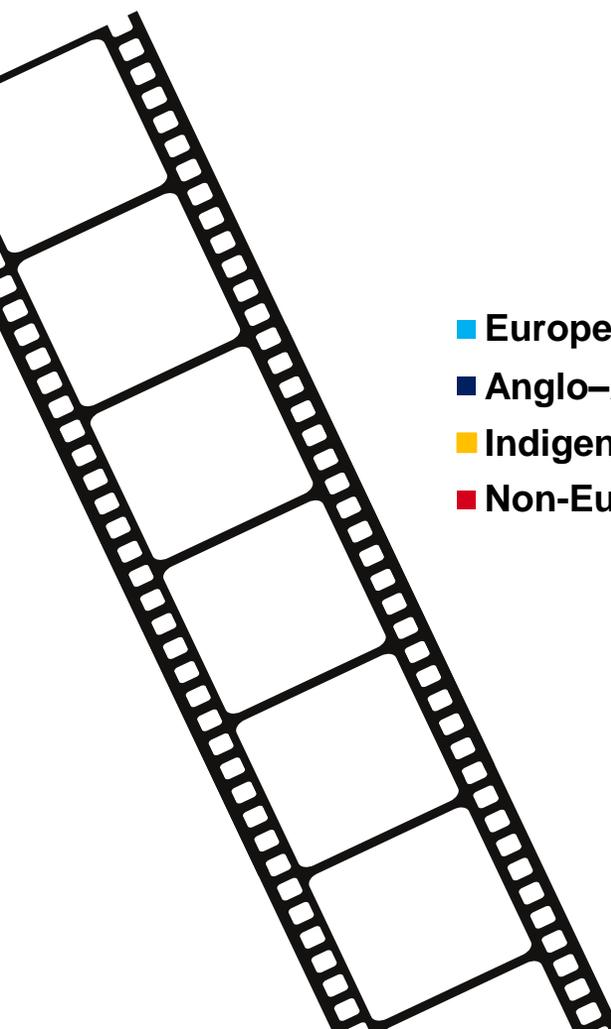


Source: Vivid Social

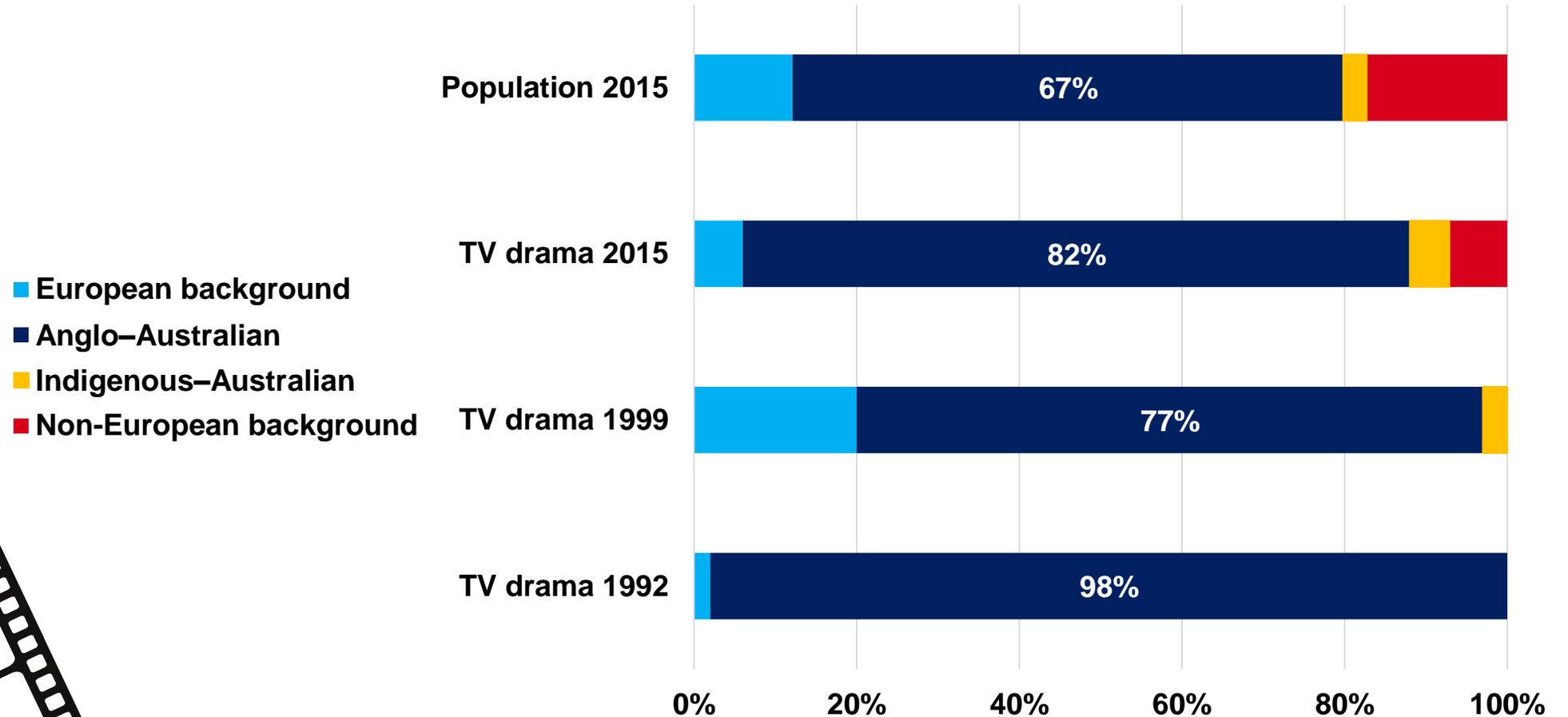
AIEC 2018

Monthly Active User (millions, Sep 2018)

THE ARTS



TV Drama Main Actors



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

THE ARTS



THE ARTS



Detective Chinatown



Dying to Survive



THE ARTS

Festivals Celebrated

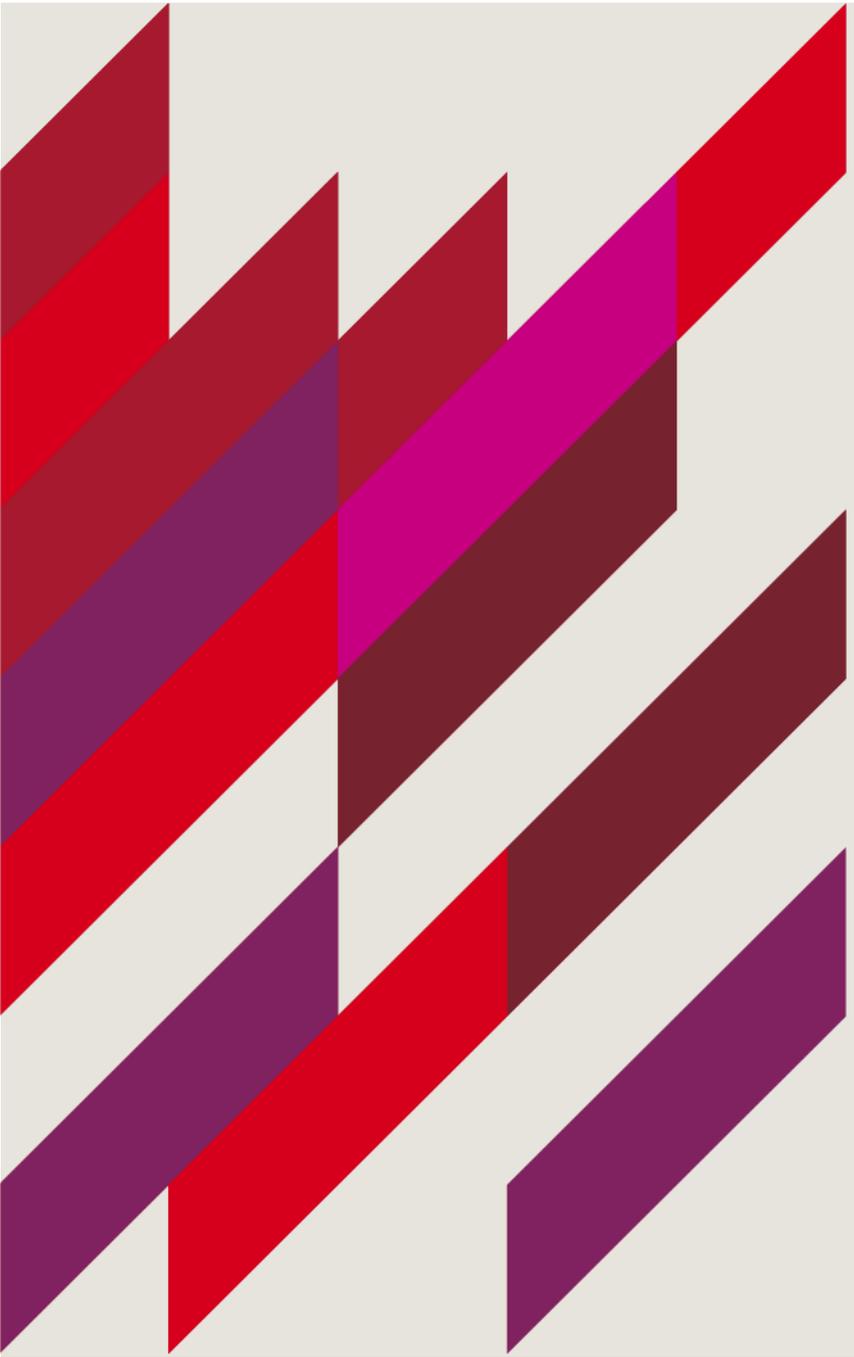
Number before 2006

- 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





3

How to create a new narrative
and maximise the benefits of
International students to
Australia

-
- 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 ?