



DIVERSIFICATION MARKET REPORTS:

AUSTRALIA

January 2015 – April 2016

Overview

Responding to the new National Strategy for International Education

In response to the launch of the Australian government's National Strategy for International Education, Hotcourses Insights have brought together new data on the current position of the Australian international market, but also sought to test out the ambitions in the new strategy.

Headlines:

- Simplification of the Australian student visa system (from 8 to 2) makes it timely to consider the trends and attractiveness of international students researching Australian higher education, early signs showing a shift toward increasing Australia's share of international demand.
- Launch of the National Strategy for International Education has targeted growth to 720,000 international students by 2025 through continued growth in established markets of China and India, but also a focus on diversification markets Australia has seen an increase in the share of international student searches (up to 22%) from July 2015 – March 2016 in a basket alongside the USA, UK and Canada.
- Whilst the scale of the target for international recruitment set out in the National Strategy for 2025 is ambitious, our data suggests this is a feasible target if universities can continue to diversify recruitment, with Vietnam, Indonesia, Thailand and Brazil identified as the countries most primed to deliver this growth.
- Amongst diversification countries (beyond China and India), Vietnam leads the way in researching Australian higher education providers on the Hotcourses Insights. However when focussed solely on the Group of 8 universities, Indonesia is the leading country searching for international study.
- Australia has grown its share of international student searches (in a basket with the United States, United Kingdom and New Zealand) from 20.8% to 21.9%, largely at the expense of the United Kingdom which has fallen from 33.1% to 31.3% in the same time period.
- If Australia continues to increase its share of international market share, it should surpass France in third position of international students (source: UNESCO), and challenge the United Kingdom in second place.

This report captures an overview of interest from prospective international students looking at Australia. The data in this report is informed by the Hotcourses Insights Tool which tracks searches across the global Hotcourses websites, to which there were over 23,000,000 users through 2015.

The data in this report is drawn from the time period 1 November 2014 – 31 March 2016, however analysis in this report covers a range of time periods to demonstrate trends over time.







During the 17 month period that covers this report there were just over 2,265,000 visits from prospective students looking at Australia across the Hotcourses websites.

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Offline

Rất tiếc không có ai trực tuyến để hỗ trợ bạn vào lúc này nhưng bạn vẫn có thể để lại lời nhắn và chúng tôi sẽ liên lạc với bạn trong thời gian sớm nhất nhé!

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GỬI LỜI NHẮN

Global Search: www.hotcoursesabroad.com

WHAT WERE THE LOCATIONS OF USERS SEEKING INTERNATIONAL STUDY IN AUSTRALIA FROM DIVERSIFICATION MARKETS (BETWEEN NOVEMBER 2014 – MARCH 2016)

LOCATION	RESULTS	PERCENTAGE
1) Vietnam	359,381	15.9%
2) Indonesia	288,166	12.7%
3) Australia	248,001	11.0%
4) Thailand	242,091	10.7%
5) India	157,154	6.9%
6) United States	69,612	3.1%
7) Saudi Arabia	52,585	2.3%
8) Egypt	48,578	2.2%
9) Malaysia	40,666	1.8%
10) Russia	27,444	1.2%
11) Turkey	25,842	1.1%

It is particularly noticeable that there is a skew toward the Eastern Hemisphere, and 3 South East Asian countries are prominent in the searches for international study in Australia, namely Vietnam, Indonesia and Thailand. A number of these countries compliment the recently published priority diversification markets in the National Strategy for International Education. There are also a significant number of searches from prospective students looking at study in Australia, from Australia – a combination of pre-HE and current undergraduate international students looking at further or postgraduate study.

This report focuses on the crucial diversification markets (largely outside of China and India) which provide the biggest potential for growth in international students going to Australia.

Policy Landscape

Australia has made a number significant shifts in policy decisions in order to increase its competitiveness in terms of international student attractiveness and recruitment.

During 2015, there were just over 270,000 international higher education enrolments in Australia across all territories.

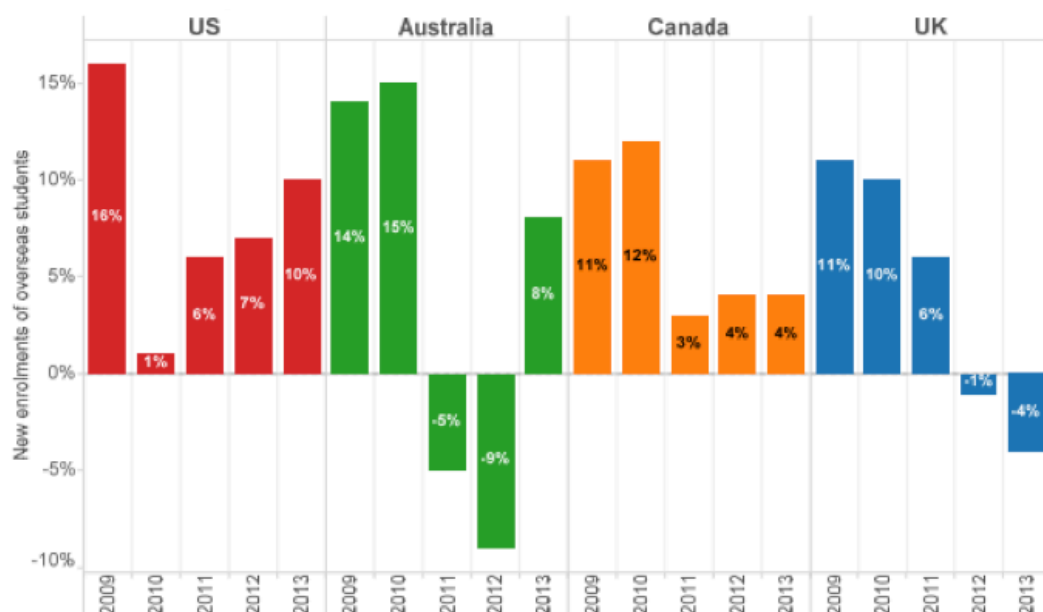
NATIONALITY	TOTAL
1) China	97,050
2) India	35,362
3) Malaysia	14,302
4) Vietnam	12,798
5) Nepal	12,261
6) Pakistan	9,210
7) Indonesia	8,458
8) Hong Kong	8,129
9) Singapore	7,081
10) Korea, Republic of (South)	5,821
11) Other nationalities	61,623
Total	272,095

(Source: Australian Government, Department of Education and Training)

Australia remains a highly popular global destination for international students. According to UNESCO statistics published in July 2014, Australia had the 4th largest international student population.

DESTINATION COUNTRY	TOTAL NO. OF STUDENTS
1) United States	740,482
2) United Kingdom	427,686
3) France	271,399
4) Australia	249,588
5) Germany	206,986
6) Russia	173,627
7) Japan	150,617
8) Canada	120,960
9) China	88,979
10) Italy	77,732

(Source: UNESCO institute for statistics, July 2014)



Sources: Institute of International Education, Australian Education International, Citizenship and Immigration Canada, HESA

In 2011, a major strategic review of the Student Visa Programme led by Michael Knight, led to a series of changes which have helped to improve Australia's competitiveness in relation to international student recruitment.

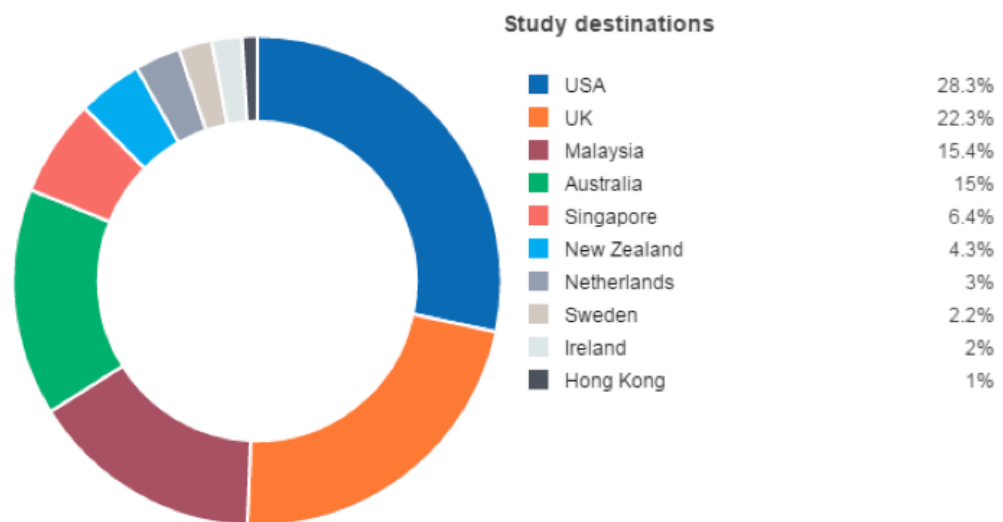
In 2013, Australia saw an increase by 33% in the international students enrolled in higher education from India (up to 16,732) which was in large part explained by a simultaneous drop in applications to the United Kingdom due to changes in their visa regime which were poorly received in India. From mid-2013, those qualifying from an Australian university are entitled to switch onto a work-based visa for between two and four years, depending on the level of qualification obtained.

When comparing the actual international recruitment for Australia with a number of direct competitors, we can see that Australia recovered well in 2013 to seek a return to growth in international enrolments. The United States has continued to enjoy growth, whereas the United Kingdom has started to see a slight decrease in international student numbers.

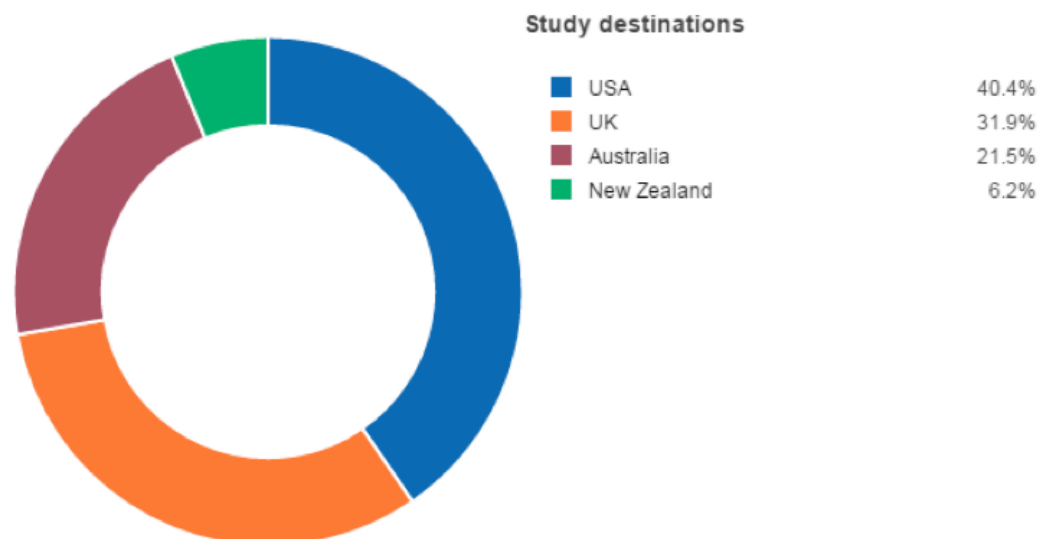
"Linking this to the new National Strategy for International Education, the target of reaching 720,000 international students by 2025 is ambitious but feasible. It will most likely be realised by maximising of recruitment by diversifying beyond China and India, with Vietnam, Indonesia, Thailand and Brazil being the prime candidates."

Where are international students searching?

Across the Hotcourses international websites, over the period of November 2014 – March 2016, Australia received 15% of international traffic.

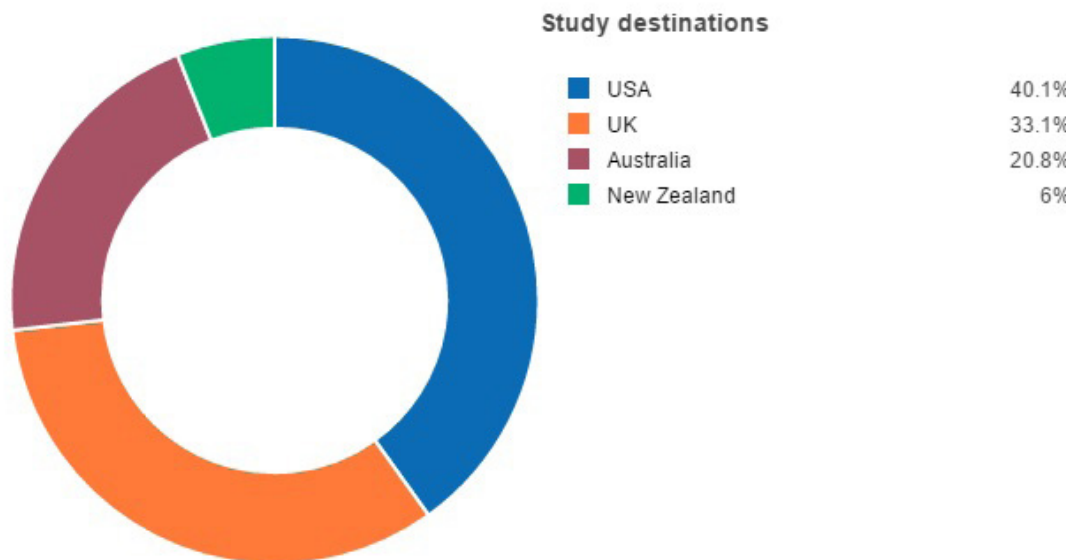


Across the Hotcourses international websites, over the period of November 2014 – March 2016, in a basket with key competitors Australia received 21.5% of international traffic.



Over the 17 month period of this report, we can see that Australia is gradually receiving an increase in the proportion of international searches. This is best demonstrated when we compare the market share for Nov 2014 – June 2015, with July 2015 – March 2016.

INTERNATIONAL STUDENT SEARCHES (NOV 2014- JUNE 2015)



INTERNATIONAL STUDENT SEARCHES (JULY 2015- MARCH 2016)



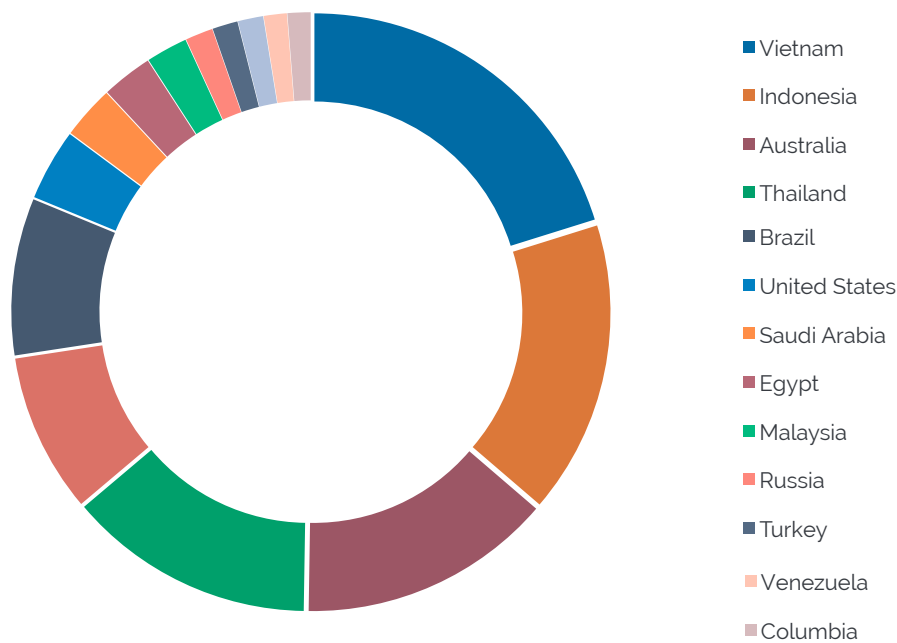
We can see over the respective time periods, that **Australia has managed to increase its share of international searches from 20.8% to 21.9%**. This growth is **largely at the expense of the United Kingdom, which has dropped from 33.1% to 31.13%** of the searches conducted.

Searches for Go8 institutions only

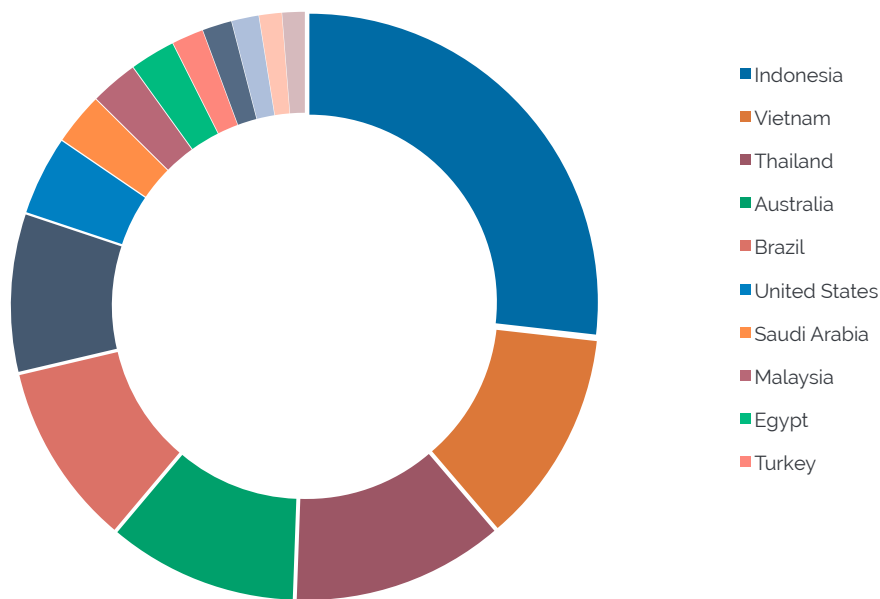
When considering searches for institutions in the Group of 8 Australian universities, there is a slight difference with the searches for study in Australia as a whole. Whereas overall Vietnam is the most prominent country for a search, when considering Go8 universities only, it is Indonesia where the largest number of searches are coming from.

LOCATION	PERCENTAGE
1 – Indonesia	21.3%
2 – Vietnam	9.5%
3 – Thailand	9.4%
4 – Australia	8.4%
5 – Brazil	8.1%
6 – United States	3.5%
7 – Saudi Arabia	2.3%
8 – Malaysia	2.1%
9 – Egypt	2.0%
10 – Turkey	1.4%
11 – Singapore	1.3%
12 – Russia	1.2%
13 – Hong Kong	1.0%
14 – Pakistan	1.0%

OVERALL INTERNATIONAL SEARCHES TO AUSTRALIA

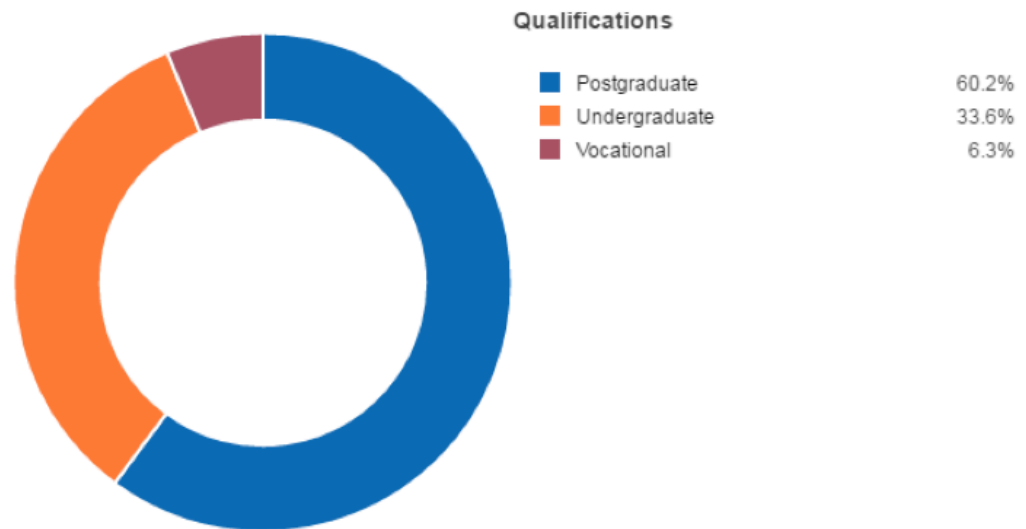


SEARCHES TO GROUP OF 8 UNIVERSITIES ONLY



What level are they searching?

Of the international students searching for study in Australia, there was a breakdown between postgraduate (60.2%), undergraduate (33.6%) and vocational (6.3%).



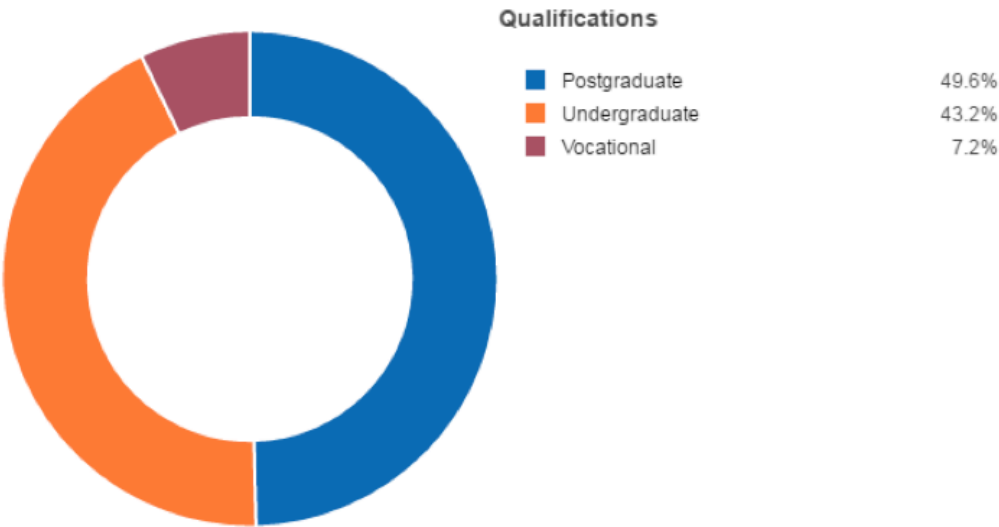
However the balance between postgraduate and undergraduate searches does vary relatively significant by country. For students looking from Vietnam, around 50% of searches were at postgraduate level, 55% from Indonesia and 62% from Thailand, with a figure of 81% at postgraduate level for prospective international students from India.

It is also interesting to observe that when you only consider searches for the Australia Group of 8 universities, the searches are further concentrated toward postgraduate study (69.3%).

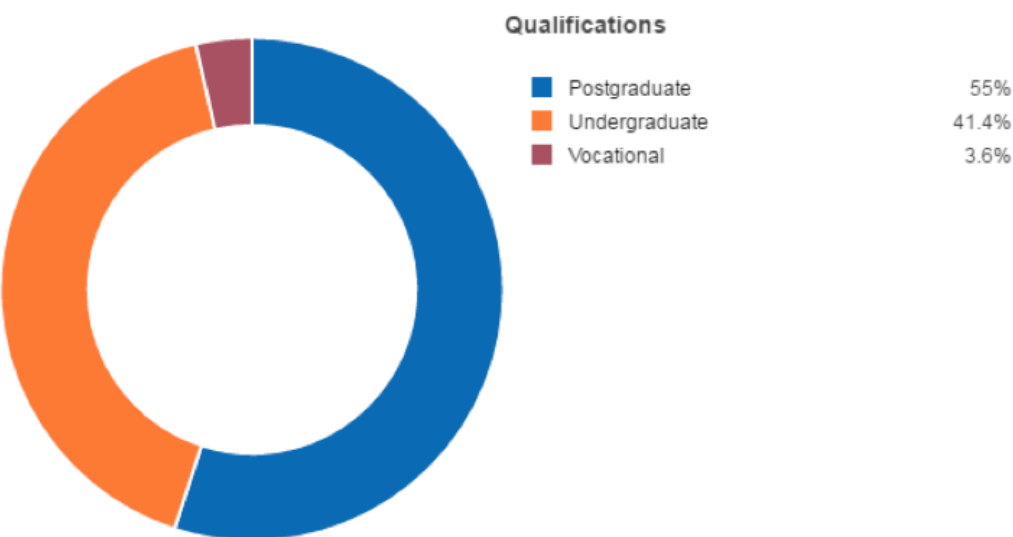
SEARCHES TO GROUP OF 8 UNIVERSITIES



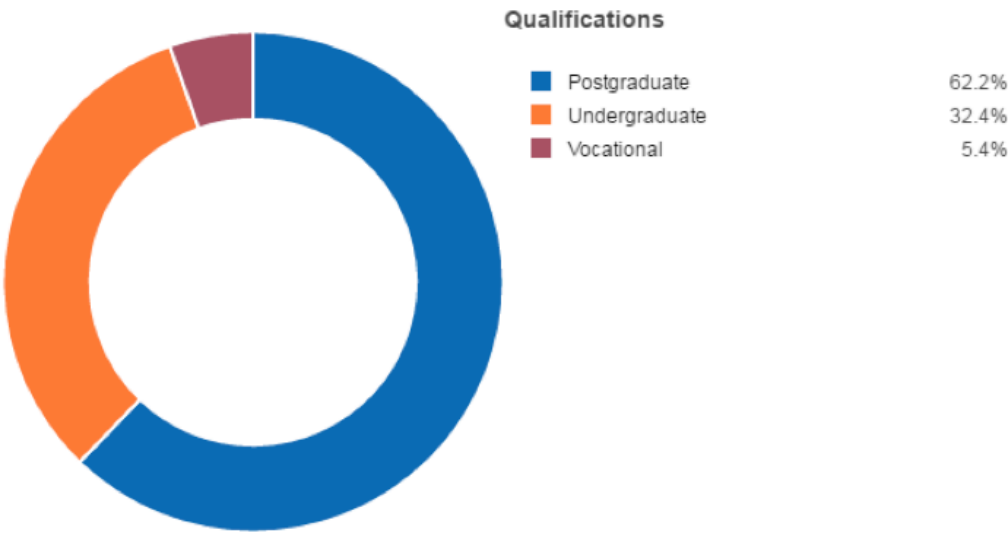
SEARCHES FROM VIETNAM



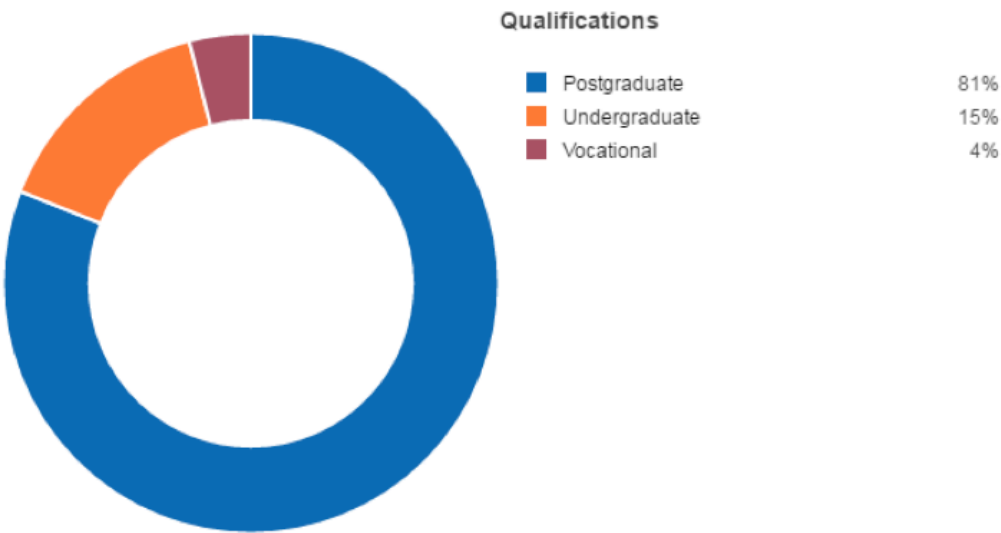
SEARCHES FROM INDONESIA



SEARCHES FROM THAILAND



SEARCHES FROM INDIA



Which subjects are they looking for?

Depending on the country of the prospective search, there are some interesting variances in terms of the most popular subjects they are looking for. We can also drill down within the subject categories for the specific disciplines that students are looking for on the Insights Tool.

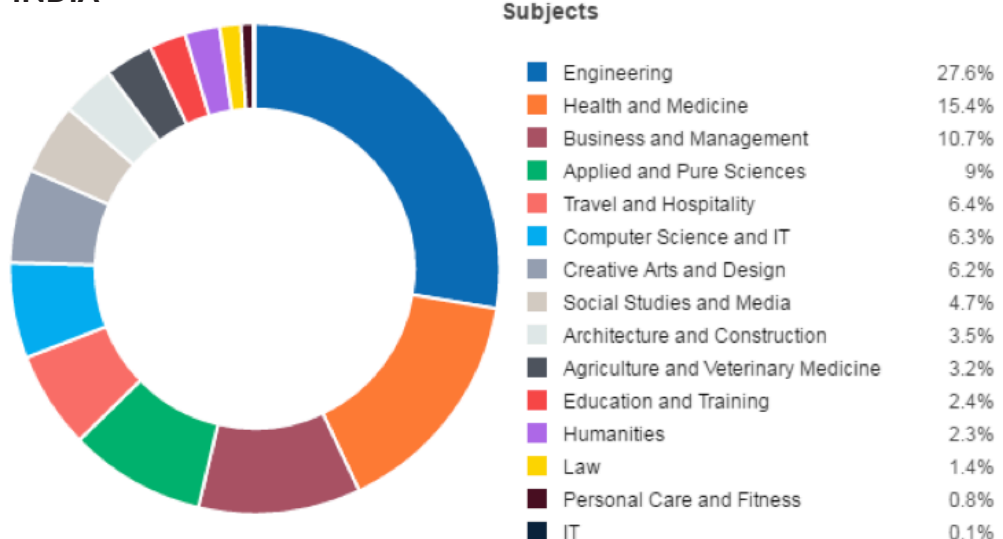
VIETNAM



BRAZIL



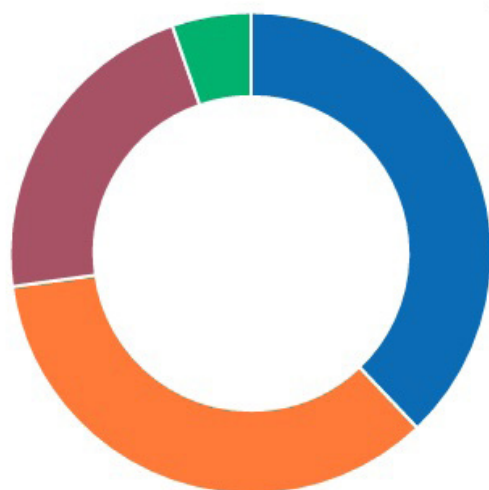
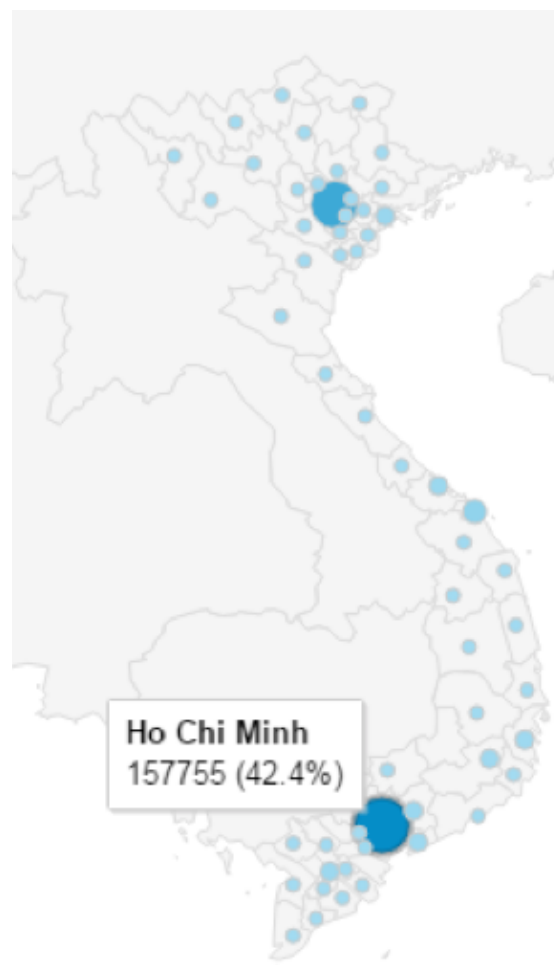
INDIA



Understanding Vietnamese demand for Australia

As the country with the highest proportion of searches for Australia, it is interesting to observe the relatively high concentration of searches from within Vietnam coming from Ho Chi Minh (42.4%) and Hanoi (27.3%).

LOCATION	AUS PERCENTAGE	UK,US,NZ, AVERAGE
1 – Ho Chi Minh	42.4%	44.0%
2 – Hanoi	27.3%	27.4%
3 – Da Nang	4.6%	5.1%
4 – Haiphong	2.6%	1.7%
5 – Dong Nai	2.2%	2.3%
6 – Thua Thien Hue	1.8%	1.6%
7 – Can Tho	1.7%	1.4%
8 – Ba Ria - Vung Tau	1.4%	1.2%
9 – Khanh Hoa Province	1.2%	1.3%
10 – Lam Dong	1.1%	1.0%
11 – Nghe An	1.0%	0.8%
12 – Hai Duong	0.9%	0.5%
13 – Tien Giang	0.8%	0.7%
14 – Thai Nguyen	0.7%	0.5%
15 – Binh Thuan	0.7%	0.6%



Study destinations

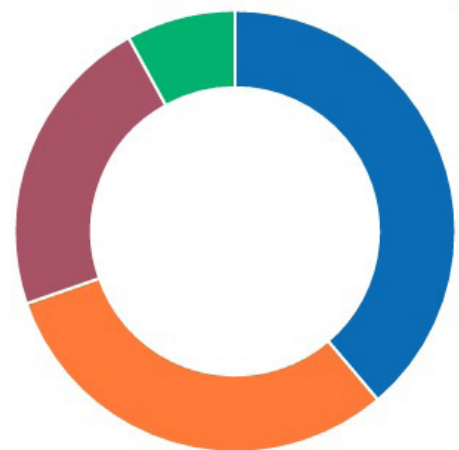
USA	37.9%
Australia	34.9%
UK	21.9%
New Zealand	5.3%

Understanding Indonesian demand for Australia

Whilst the area with the greatest proportion of international searches for Australia from Indonesia is Jakarta (40.6%), there are also a sizeable number of searches from East Java (17.2%) and West Java (8.7%).



LOCATION	AUS PERCENTAGE	UK,US,NZ, AVERAGE
1 – Special Region of Jakarta	40.6%	45.3%
2 – East Java	17.2%	15.4%
3 – West Java	8.7%	7.6%
4 – North Sumatra	6.4%	7.0%
5 – Special Region of Yogyakarta	4.2%	4.1%
6 – South Sulawesi	3.2%	3.1%
7 – Central Java	3.0%	2.7%
8 – Bali	2.7%	2.1%
9 – Banten	2.7%	2.7%
10 – South Sumatra	1.7%	1.7%
11 – East Kalimantan	1.2%	1.2%
12 – West Kalimantan	1.2%	0.9%
13 – Riau	1.1%	1.4%
14 – West Sumatra	1.0%	0.9%
15 – Riau Islands	0.8%	0.7%



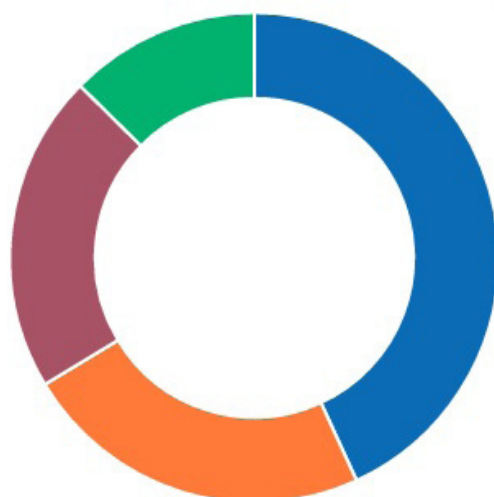
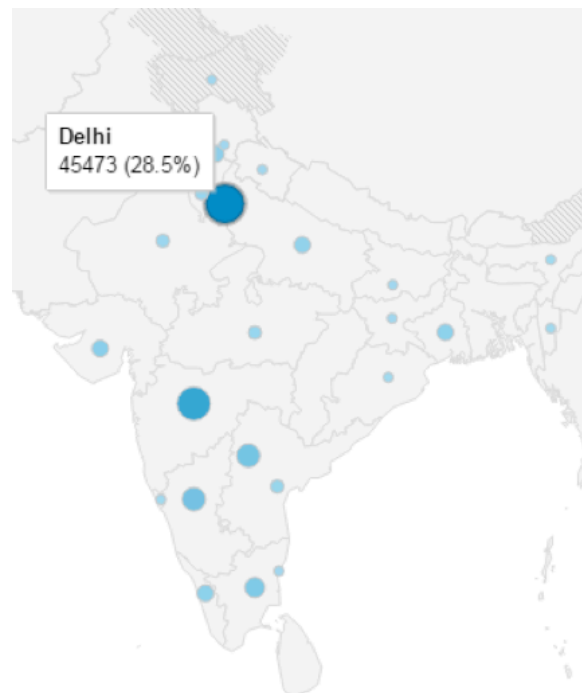
Study destinations

UK	38.8%
Australia	30.9%
USA	22.3%
New Zealand	8%

Understanding Indian demand for Australia

Delhi (28.5%) is the area within India where the largest number of international searches are made, followed by Maharashtra (18.8%) and then Karnataka (8.2%).

LOCATION	AUS PERCENTAGE	UK,US,NZ, AVERAGE
1 – Delhi	28.5%	27.6%
2 – Maharashtra	18.8%	20.2%
3 – Karnataka	8.2%	8.7%
4 – Telangana	7.7%	8.9%
5 – Tamil Nadu	6.4%	8.5%
6 – Gujarat	4.4%	4.8%
7 – Punjab	4.0%	3.0%
8 – Chandigarh	3.7%	1.9%
9 – Kerala	3.4%	2.1%
10 – West Bengal	3.3%	2.5%
11 – Uttar Pradesh	2.5%	1.9%
12 – Andhra Pradesh	1.9%	2.7%
13 – Madhya Pradesh	1.6%	1.2%
14 – Haryana	1.4%	0.9%
15 – Rajasthan	1.1%	1.0%



Study destinations

USA	43.1%
Australia	23.2%
UK	21%
New Zealand	12.6%

Overall it continues to be a buoyant period for international demand in Australia. The changes to the visa requirements made earlier in the decade, and further changes to be implemented in July provide the basis for a positive upward trend in both searches for, and then applications and enrolment in Australian higher education.

For further market information on demand for Australia, or a bespoke report based on your own institution please contact insights@hotcourses.com

If you would like to request a specific country or bespoke destination or market report, please contact us at insights@hotcourses.com

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