



International Education 2030

Annual Report 2019–2020



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For the full calendar year 2019 and January to June 2020, the international education sector in South Australia performed at record levels, outperforming the national average growth rate of enrolments by over 6.5 per cent.

Of significance, has been the progress toward growing previously underrepresented regions to drive market diversification, product diversification and expansion and business sustainability.

In 2019, the sector achieved \$2.15 billion in state contribution, an 18 per cent increase on 2018, and continues to be a significant driver of employment. In 2019, the sector supported 19,900 South Australian jobs and continues to build a pipeline of skills and talent to address skills shortages for future industries and occupations in demand.

Performance against target

Targets within the International Education 2030 plan are specified at three full calendar year time points, 2018, 2022 and 2030. Incremental performance targets have been calculated using the same modelling and applied to annual points, based on those calculations, the International Education sector at December 2019 has outperformed sector plan targets.

International Education 2030 Targets	2019 Target	2019 Achieved	Performance
Enrolments	41,000	44,200	+ 3,200
Education jobs	13,500	19,900	+ 6,400
Economic value	\$1.85 billion	\$2.15 billion	+ \$0.30 billion
Contribution to GSP	1.30%	1.80%	+ 0.50%

Record sector growth

SA Enrolled	2019	% Growth	% Share
Higher Education	23,949	15.4%	54.3%
VET	9,367	40.3%	21.2%
Schools	2,855	-0.4%	6.5%
ELICOS	5,022	5.8%	11.4%
Non-award	2,926	-1.9%	6.6%
Total	44,119	16.0%	100.0%

South Australia's 2019 overall enrolment growth of 16% outperformed the national average of 9.7%



In 2019 VET growth reached 40.33%
Higher Education growth reached 15.4%

Expanding source markets

SA Enrolled	2019	% Growth	% Share
China	15,198	1.4%	34.5%
India	8,949	61.7%	20.3%
Vietnam	2,105	18.8%	4.8%
Nepal	2,088	30.3%	4.7%
Hong Kong	2,027	-0.9%	4.6%
Malaysia	1,464	-5.9%	3.3%
South Korea	1,047	5.5%	2.4%
Philippines	954	99.2%	2.2%
Brazil	868	79.0%	2.0%
Kenya	841	-2.4%	1.9%
Total	35,541		80.6%



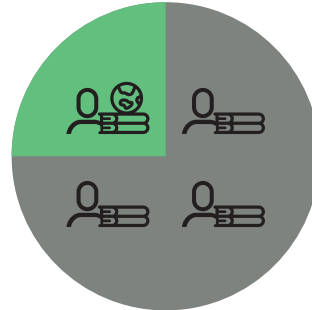
China and India account for over half of all SA international enrolments. Strong growth in new markets is driving market diversification and continuity

Average state benefit for every 100 international enrolments in Adelaide



New revenue, new jobs and new opportunities created directly from collaborative international engagement.

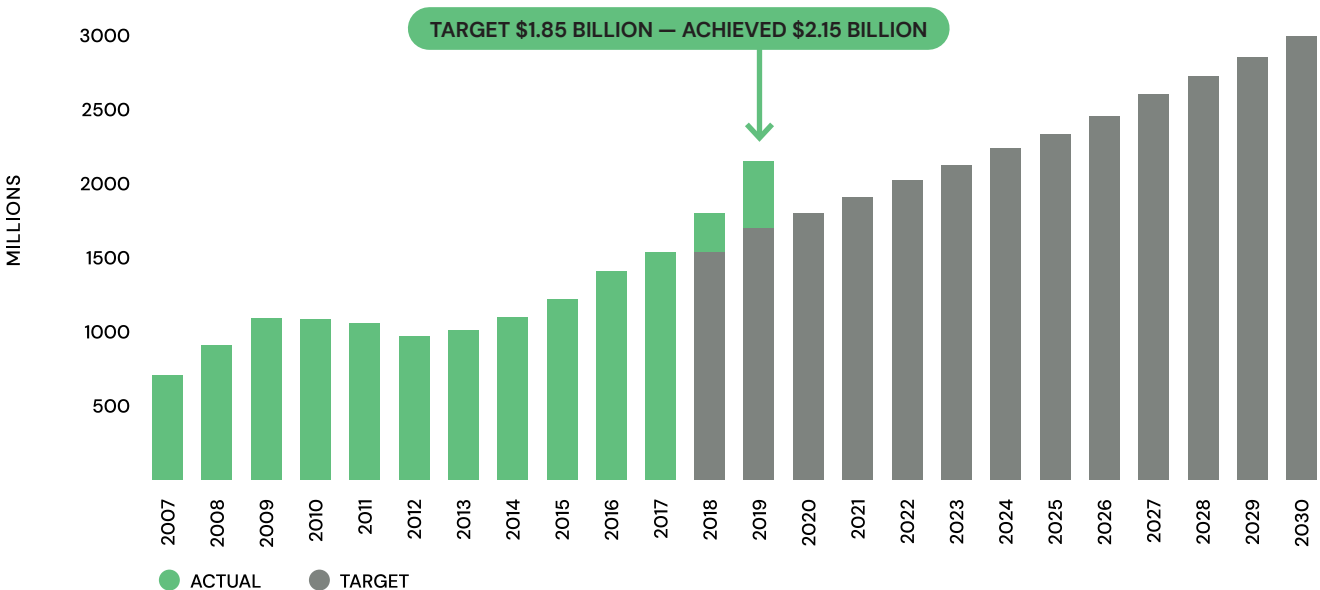
Contribution to research



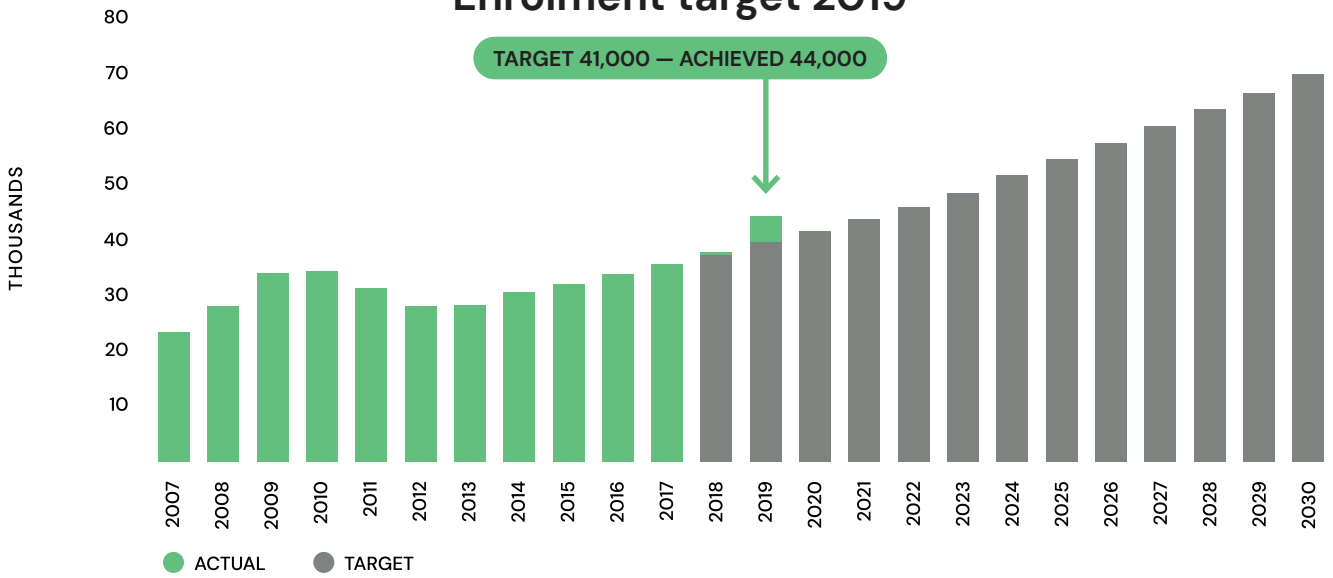
One in every four post-graduate research students were international students.

Building pipelines of skills and talent to address skills shortages for future industries and occupations in demand.

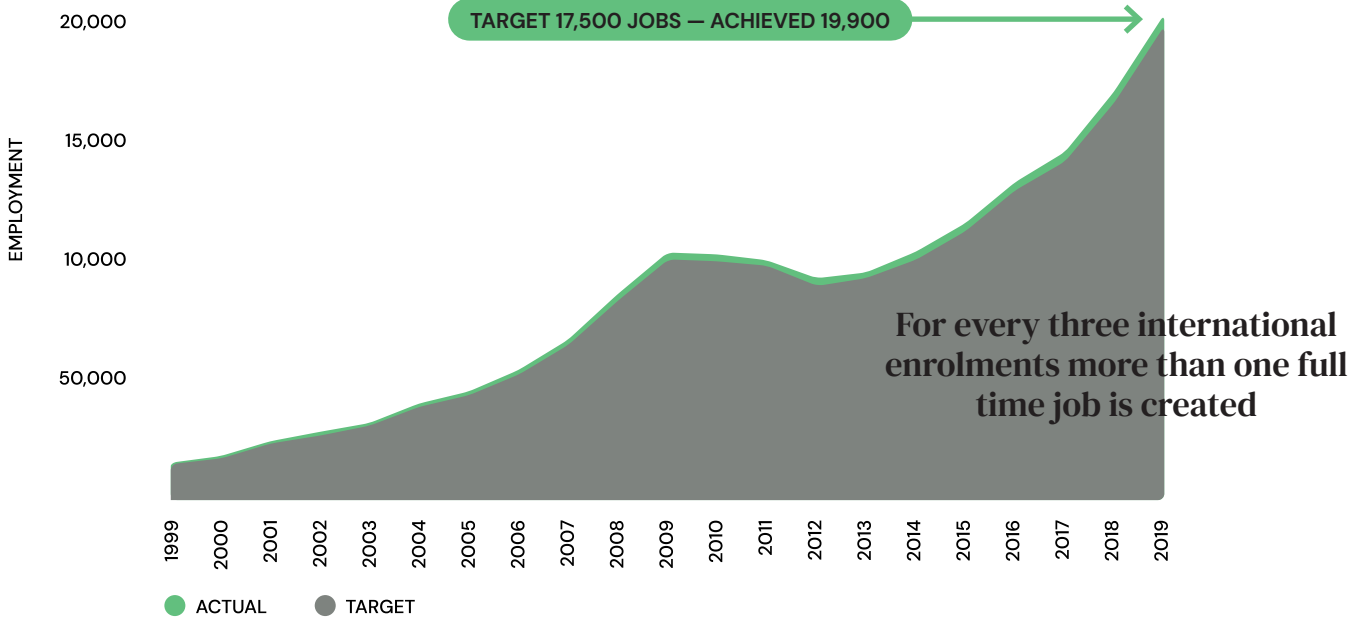
Export target 2019



Enrolment target 2019



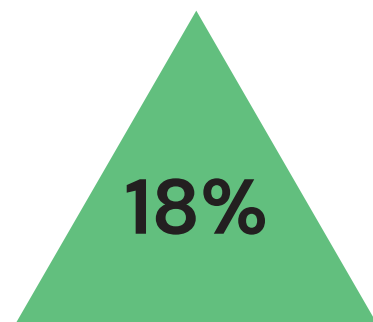
Employment target



GSP Target 2019

TARGET 1.3% OF GSP — ACHIEVED 1.8% OF GSP TARGET

In 2019 International Education, for the first time became the state's largest export earner, increasing its contribution by 18%



Summary



The International Education 2030 Sector Plan, released in August 2019 by the Hon Steven Marshall MP, Premier of South Australia, clearly outlines the government's direction and actions to support growth of the international education sector to 2030. The plan has been developed through extensive collaboration with stakeholders of the international education sector including institutions, industry, international students and State and Commonwealth agencies.

International education is a significant contributor to the economy of South Australia and is the state's largest export generating approximately \$2.15 billion of economic activity for the full calendar year 2019 and supporting approximately 19,400 South Australian jobs.

Importantly, beyond its financial contribution, international education is attracting new students, new industries and new investors to South Australia, contributing to cultural exchange, integration and diversification. Attracting the world's best and brightest to study in South Australia paired with access to favourable Post Study Work Rights and pathways to permanent residence, is building a pipeline of talent and skills to contribute to our future skills, population and migration goals.

International education has a pivotal role to play in South Australia's post pandemic recovery, not only is the sector our most valuable, it is also one of the most agile. Typically, the sector is able to scale up and scale down as conditions dictate. Our reputation remains highly credible, barriers to entry are low and our international markets indicate a strong future.

Extensive international student independent reports indicate that international students remain resolved in continuing their international studies despite quarantine measures and online or blended delivery. South Australia is benefiting from its International Education 2030 destination marketing and student experience strategy as students are consistently reporting that they will return to, or travel to, South Australia to study as soon as travel restrictions are lifted. Although COVID-19 has created significant challenges for international students and institutions in 2020, the international education sector has continued to perform strongly and show solid signs of ongoing growth post pandemic.

Sector growth target progress

2020 year to date data to 30 June 2020 show that international enrolments were 14.14 per cent higher for the same period in 2019, significantly higher than the national average growth of 2.45 per cent. Importantly, international education commencements in South Australia outperformed June 2019 YTD by 9.65 per cent compared with the national average commencement performance for YTD June 2020 which contracted by 8.29 per cent.

Growth in South Australia has been strongest in the Higher Education (HE) and Vocational Education and Training (VET) sectors which reported enrolment growth rates of 13.29 per cent and 42.33 per cent respectively. HE accounts for 59.67 per cent of international enrolments followed by VET at 22.93 per cent, although VET continues to increase its share of total enrolments.

VET is the state's fastest growing international education sector, and importantly, is diversifying its source markets as demonstrated by growth of 124 per cent in Columbia, 81 per cent in India, 67 per cent in Brazil and 64 per cent in the Philippines. These new and emerging markets are significant markets of opportunity for the future and present opportunities for sustainable growth and international education product diversification.

A significant enabler of South Australia's international education performance is the performance of student visa approval rates, which on average, have lifted to 93.0 per cent in 2019-20 compared with 91 per cent in 2018-19 and 85 per cent in 2017-18. In some markets the improvement in approval rates has been outstanding, for example VET student visa approvals from India achieved 80 per cent in 2019-20 compared with 55 per cent in 2018-19 and 45 per cent in 2017-18. Visa approval rates have historically presented a significant impediment to the growth of this sector. Improvement has, in many cases, been created through engagement with a broader range of reputable international student recruitment agencies and more stringent student selection processes by both agents and institutions.



Wee Hur Student Accommodation Plans

International education investment, although impacted in the first half of 2020 by the national bushfire crisis and the COVID-19 pandemic remains positive. Interest in the Purpose Built Student Accommodation (PBSA) sector remains healthy as evidenced by purpose built student accommodation projects under construction in the Adelaide CBD including the Global Student Accommodation 725-room complex on North Terrace, the Wee Hur 787 room complex on Waymouth Street and the 203 North Tce. Pty. Ltd 340 bed complex also on North Terrace.

International education and research and development infrastructure major projects, although slowed by the effect of the pandemic, continue to be a strong source of economic opportunity for the future. Initiatives such as the Flinders University Flinders Village \$1.5 billion project, offer state building development opportunities for infrastructure investment, research and development, international education growth, and critically, sustainable revenue and jobs growth.

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Actions taken



Government

Government continues to progress the three key growth enablers highlighted in the plan and is delivering on its commitment to lead the investigation and development of those significant initiatives:

1. Attract students and industry to a new International Student Hub that provides resources to international students and facilitates collaboration between industry, entrepreneurs and students.

- in consultation with the sector and the Ministerial Advisory Committee for International Education, the government has investigated the potential for a student hub and produced a comprehensive feasibility report for the Minister for Trade and Investment and sector stakeholders for consideration and recommendations in 2020-21.

2. The government will establish an International Centre for Food, Hospitality and Tourism Studies.

- Government is progressing development of the International Centre for Food, Hospitality and Tourism Studies, to be located at LOT Fourteen. Government has completed a global expression of interest and has commenced procurement for infrastructure construction scheduled for commencement in Q3 2021 and completion in Q4 2023.

3. Increase on-shore and off-shore marketing to targeted countries through an increase in the number of brand ambassadors and increasing tourism to South Australia.

- Government has expanded its offshore destination marketing activity through increasing its funding to StudyAdelaide which has enabled expanded digital media platforms, greater market reach and the appointment of 29 student ambassadors from China, India, Sri Lanka, Nepal, Singapore, Vietnam, and Malaysia to promote Adelaide as a study destination of choice and boost the visitors, friends and relatives tourism economy.

In addition, Government and the international sector continues to progress the four key pillars committed to in the plan:

1. Live, Learn and Stay

Government continues to promote the Live, Learn and Stay message across international markets and has engaged across government agencies and the sector to champion new programs for innovative variations to student visa work rights, and regulations to create opportunities to align the expansion of courses with future skills and occupations in demand.

2. Develop a global career in South Australia

Interaction is progressing with industry and stakeholders including Business SA, the Training and Skills Commission and individual Industry Skills Councils to inform international education development of industry, research and development, internships, work placements and part time employment programs, including mechanisms that connect international student innovators, entrepreneurs, exporters and start-ups, with South Australian businesses.

3. Build our global connections in South Australia

International education continues to be promoted through the government's international trade and investment offices as a priority sector for trade and investment in the education sector, market diversification, and education infrastructure investment. New digital engagement tools and methodologies including virtual familiarisation tours, short course options on virtual platforms and student experience events to expand market reach and connectivity of the sector are being developed and supported.

4. Build leading industries in South Australia

Government has engaged with global networks of education providers, agents and education investment proponents to attract new international education business to South Australia. In addition, government will encourage the expansion of qualifications available to international and domestic students to accelerate the development of leading industries and, in some instances through our international students, become globally connected.



Industry

Participants across the international education sector have continued to be progressive and highly innovative:

- Continued to aggressively market South Australia as an international destination of choice.
- Actively sought to improve its education offerings to a changing student cohort and work ready education requirements.
- Responded quickly to the impacts of COVID-19 by transitioning to online delivery to enable students to continue their international education journey, including working closely with regulatory authorities with regard to online/on-campus delivery ratios.
- In collaboration with the South Australian Government, developed a \$55 million International Students Support Package to support international students facing financial crisis and hardship, through loss of part-time employment, access to funds from home countries and inability to access Commonwealth Government assistance packages.
- In collaboration with StudyAdelaide, provided extensive information, health and wellbeing programs, social media events, support of organisations including the Office of the Training Advocate, charity organisations, emergency and mental health support lines.

Lessons Learnt

Lessons learnt for the term of this International Education 2030 Plan review:

- Access to employment, during and post study, continues to be a significant driver in the decision-making process of an international students' choice of study location.
- The reputation South Australia has established as a clean, safe, affordable destination that cares for its international students has endured the test of the COVID-19 challenges which will assist in the post pandemic rebound.
- There are significant opportunities to develop new international education products for online and blended delivery to encourage international students to decide on Adelaide as an education destination of choice.
- High exposure in two key markets presents a significant risk to the sector and while it is acknowledged that these markets must be maintained, significant growth should be encouraged from new and emerging markets.

The reputation South Australia has established as a clean, safe, affordable destination that cares for its international students has endured the test of the COVID-19 challenges which will assist in the post pandemic rebound

Forward recommendations



COVID-19 has created significant challenges for international students and institutions in 2020, however the international education sector has continued to perform strongly and continues to demonstrate the potential for ongoing growth post pandemic. The South Australian Government will continue to collaborate with the sector to deliver post pandemic recovery initiatives in the immediate future, and the International Education 2030 plan over time including:

Student Pilot Program

This initiative will:

- Facilitate the accelerated safe return of international students to South Australia to ease economic impacts to the state and institutions and to maximise our first mover status to attract students from international education competitors and regions, from both domestic and international markets.

Global Engagement Campaign

This initiative will:

- Positively impact sustainable growth of the South Australian international education sector through market diversification including the development of new and emerging markets, new products and new delivery options.
- Facilitate the development of new international curriculum development, delivery platforms and virtual engagement in collaboration with the sector and regulators to future proof international education exposure and delivery.
- Attract international education institutions, agents and service providers to Adelaide to develop an expanded and sustainable international education supply chain.
- Fast track international education and investment pipelines of high probability projects including Purpose Built Student Accommodation, research and development partnerships and international trade and investment partnerships.
- Promote a message of economic confidence and security to encourage foreign direct investment in education, research and development and accommodation infrastructure.

International Education 2030 Plan

Government, in collaboration with the sector, will continue to implement the four core pillars of the International Education 2030 Sector Plan:

- Live, learn and stay in South Australia.
- Develop a global career in South Australia.
- Build our global connections in South Australia.
- Build leading industries in South Australia.



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