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Global Partnership Plan 2018-19

TIO Trade &
Investment
Queensland
AUSTRALIA



Study
Queensland



Start here. **Go anywhere**

Correct as printed 26 June 2018

There are three enabling initiatives in the International Education and Training Strategy

These initiatives are mutually reinforcing and support the objective of the strategy – a strong and sustainable international education and training industry.

Global Partnership Plan



The Global Partnership Plan identifies **opportunities for Queensland's International Education and Training (IET) industry** and **supporting activities** and initiatives.

In 2017-18, over **50 in-market activities** and **several supporting initiatives** were delivered as part of the Partnership Plan.

The Global Partnership Plan identifies **30 key markets**, covering 80% of all student enrolments, with opportunities across **all parts of the IET industry**.

International Education and Training Partnership Fund



The Partnership Fund matches funding **for successful projects over \$10,000**. Plus a new microgrant stream is now available to support smaller projects without matching funds.

\$1.2 million per annum has been allocated for consortia projects relating to the four strategic imperatives of the IET Strategy. 50 consortia projects have now been funded

The Partnership Fund is open twice yearly – providing an opportunity to **activate new ideas** in collaboration with Study Queensland.

International Education and Training Summit



The IET Summit brings **together industry and supporting partners** to plan for future activities, reflect on strategy, implementation and tackle emerging issues.

The IET Summit was held in Cairns in June 2018 and was **attended by over 200 IET stakeholders**. The theme was “Delivering on Diversity”.

The 2019 IET Summit will be held in June in Brisbane.

The Global Partnership Plan identifies opportunities for Queensland's IET industry, and supporting activities and initiatives

We heard that you wanted

More time to plan market activities.

A forward roadmap and clarity on which markets Study Queensland is focusing on and why.

Greater alignment of regional, state and national efforts in key markets.

So we have created

An annual process for providers, peak bodies, clusters, the offshore network and Austrade to share plans, projects and new priorities.

An additional funding mechanism through the Partnership Fund to support strategic markets and/or priority actions.

Who is responsible for what across IET:

REGIONAL



Study Clusters coordinate regional efforts and provide region specific marketing and profiling; deliver local engagement and strategic projects that are relevant to the strengths, challenges and priority areas of the region.

STATE



Study Queensland provides strategic direction on key markets for Queensland, supports alignment across all levels of government, provides key information and opportunities for providers and industry through both on and offshore networks and activities.

NATIONAL



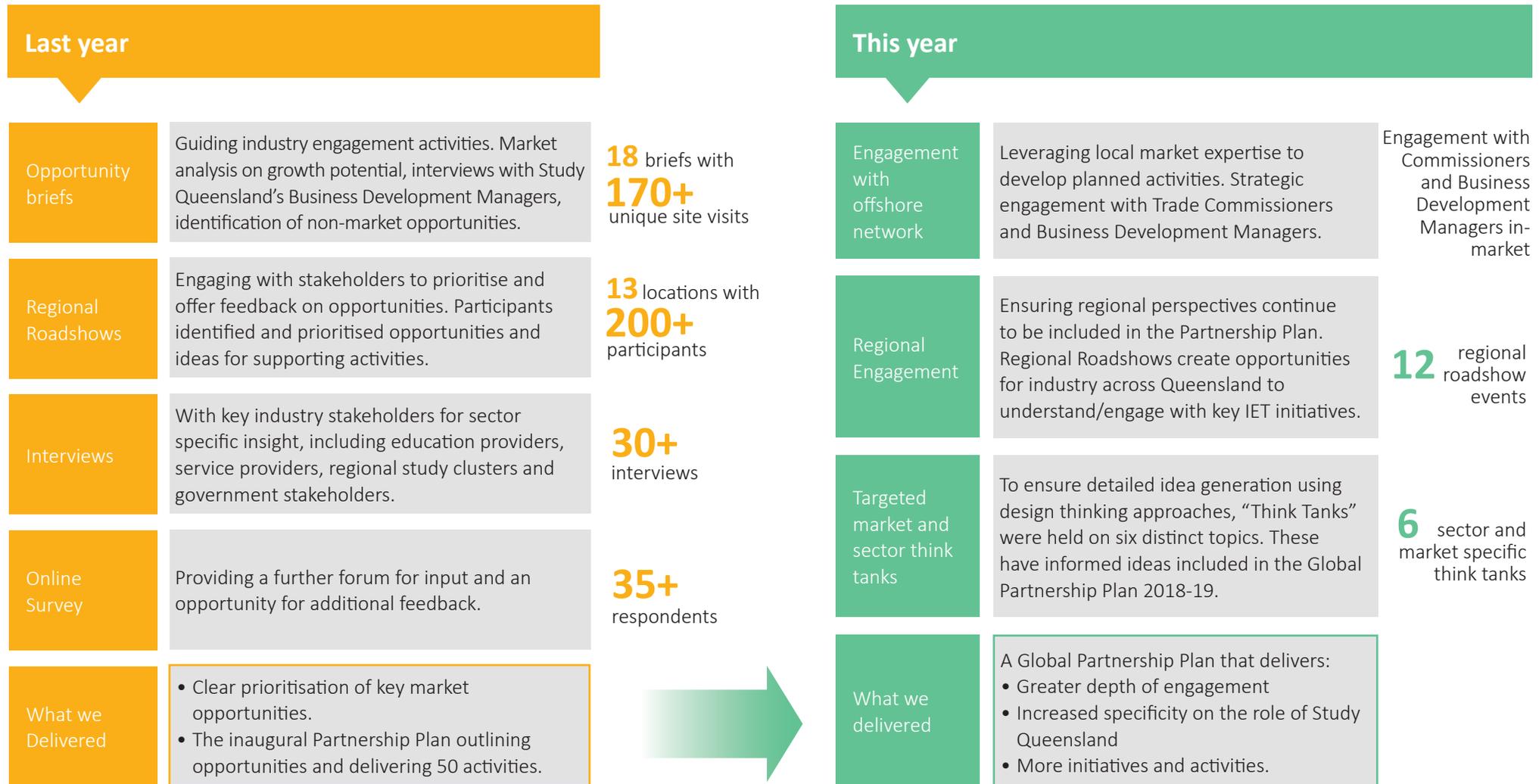
The Commonwealth, including Austrade, raises the profile of Australia in offshore markets, provides market intelligence and support through global networks.

Study Queensland has adopted a targeted approach to support the development of this year's Global Partnership Plan which builds on the previous year

Last year's process established the development of the framework and ideas to take forward...

...this year's approach has allowed for deeper engagement and more detailed development of activities.

HOW WE CO-DESIGNED WITH INDUSTRY



Markets identified as opportunities are classified into three categories

Classification was determined against a range of factors including market size, market share and stakeholder feedback.

High Priority Markets



- Large market size.
- Strong growth and/or further potential for growth.
- Consistent feedback across regions and sectors regarding importance of market as an opportunity.
- Varying state performance by sector.

Emerging Markets

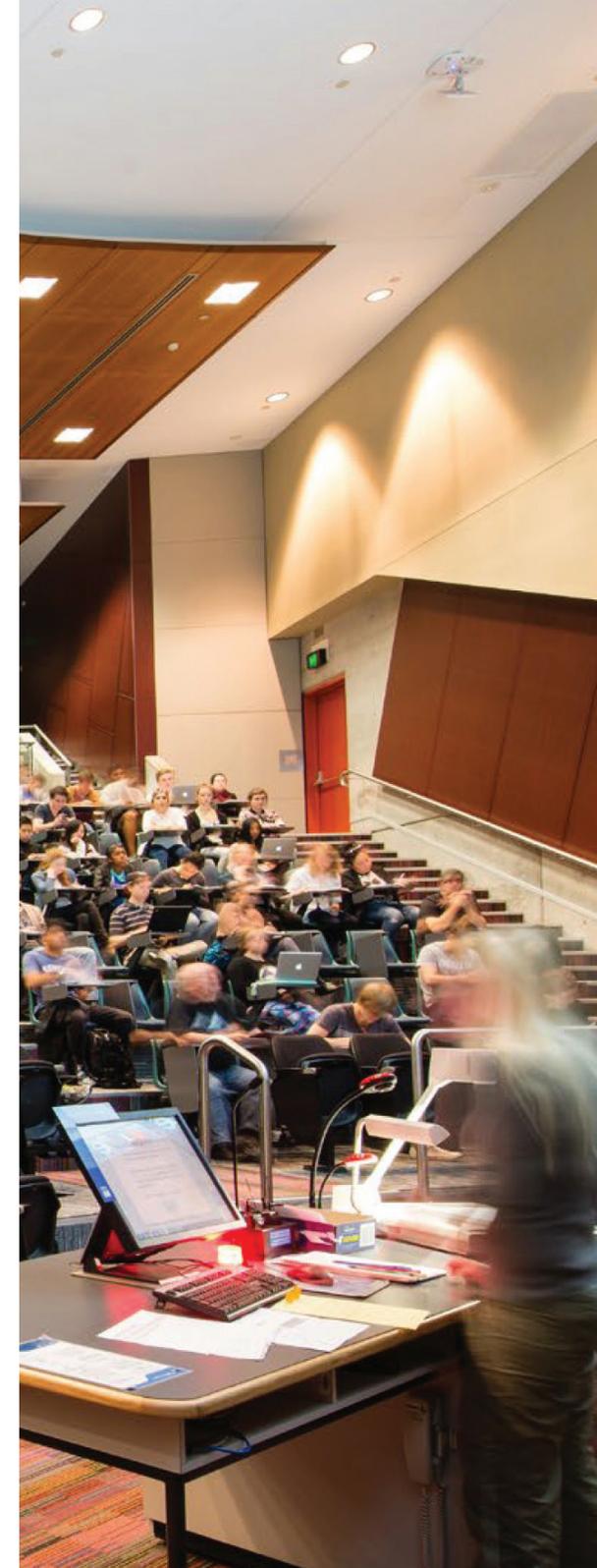


- Variable market share and/or market size.
- High growth, evidenced or potential.
- Stakeholder feedback indicating importance of market as growth opportunity.
- Relatively limited engagement in markets to date.

Mature Markets



- High market share for Queensland.
- Medium to large markets.
- Stakeholder feedback consistently highlights importance to maintain performance.
- Traditionally strong performance by Queensland.



Study Queensland will focus on priority markets and cross-market initiatives over 2018-19

Pursue high priority markets

High priority markets are large and places where Queensland should do better.

China – focus on strategic regions of China – including Shanghai, Chengdu Chongqing and Guangdong

India – focus on strategic regions of India- Karnataka, Andhra Pradesh, Telengana, Tamil Nadu, Kerala, Maharashtra and Gujurat

South East Asia – Indonesia, Singapore, Thailand, Malaysia, Vietnam and the Philippines focus on Indonesia, Singapore

Japan & South Korea

Break into priority emerging markets

Priority emerging markets present market making opportunities for Queensland with recent demonstrated growth.

Latin America – focus on Brazil, Colombia, Chile and Peru

Africa – focus on two key markets – Nigeria and Ghana

South East Asia – support upcoming markets such as Myanmar, Cambodia and Laos

Maintain performance in mature markets

Mature markets where Queensland has performed well over a long period of time.

Europe – focus on identified strategic markets – UK, Germany, Italy and Spain

Taiwan & Hong Kong

The Middle East – focus on UAE, Saudi Arabia, Iran and Kuwait

Papua New Guinea

Cross-market initiatives

Cross-market initiatives will support growth across a range of markets.

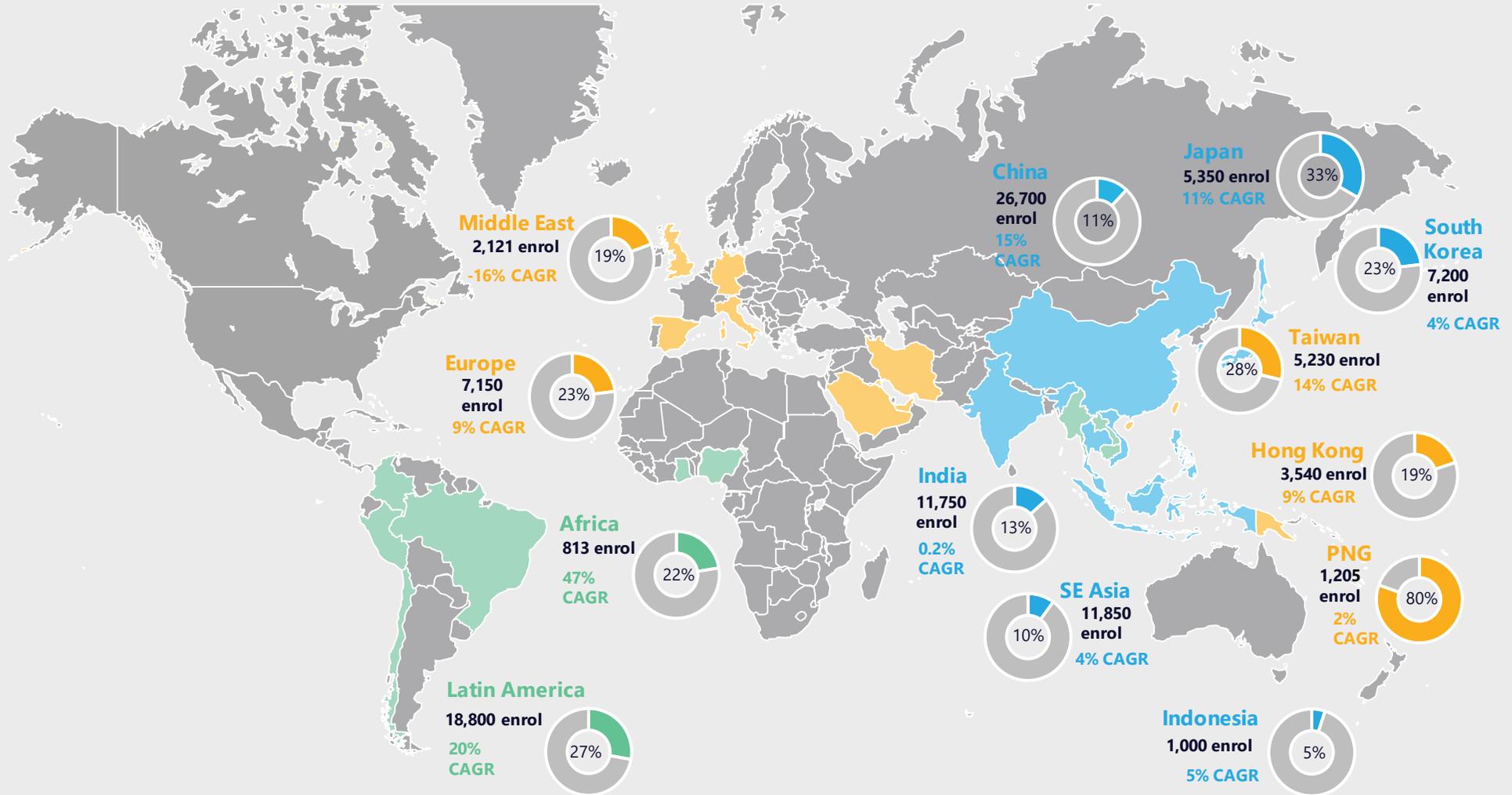
Showcasing Queensland – A series of initiatives will ensure the best of Queensland as a study destination is showcased to the world – including through Open Days in all priority markets

Working with agents – As a key influencer in the decision of students to study in Queensland we will take a systematic approach to engaging with agents and promoting Queensland

Professional development – Study Queensland will work with industry to deliver a series of activities that will build the capacity of the industry

Market intelligence – Study Queensland will support industry to develop market intelligence, undertake research and promote existing research activities

The Global Partnership Plan targets key markets around the globe



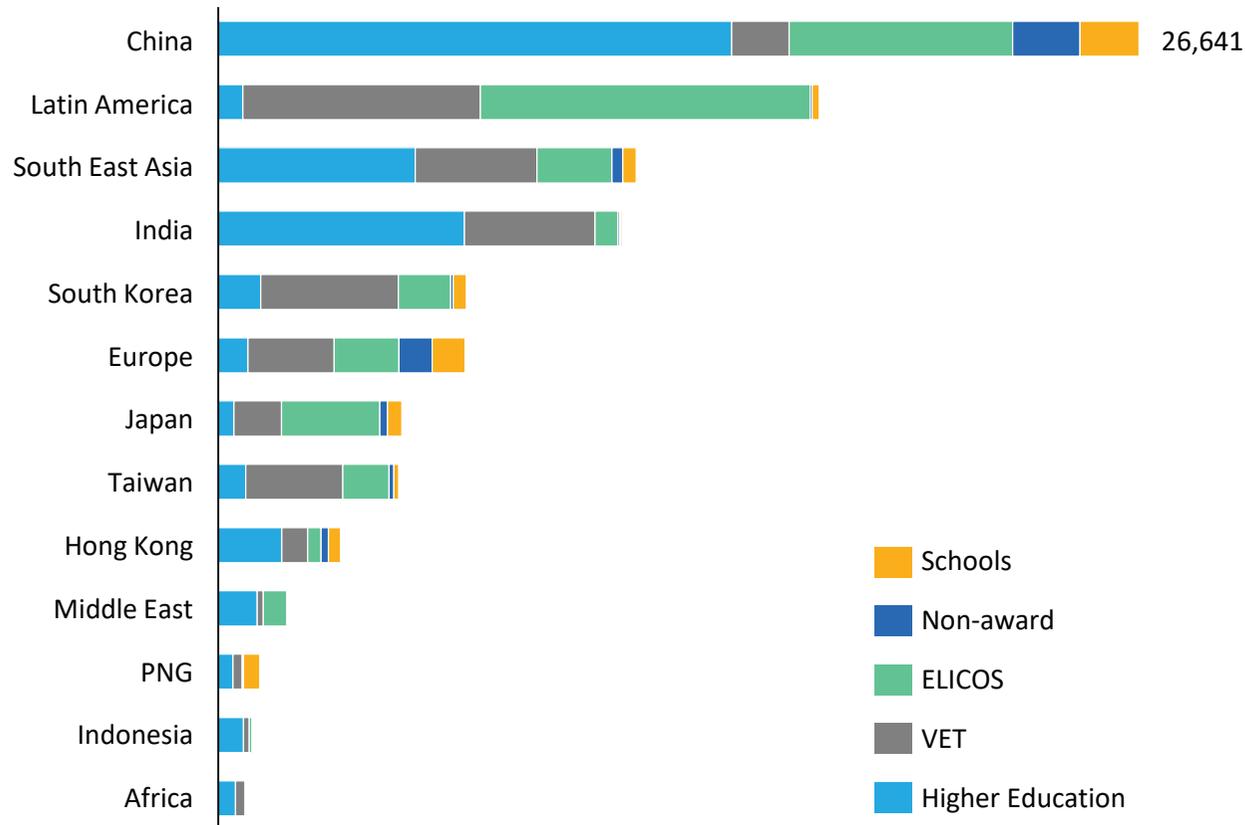
KEY ● Priority Markets ● Emerging Markets ● Mature Markets **CAGR** – Compound Annual Growth Rate % - Q1d Market Share of All Aus Enrolments

Activities will be prioritised in the following sectors for key identified markets

Industry opportunities

Priority level	PP priority	Market	Edu-tourism	Schools	ELICOS	VET	UG	PG	Research	Government Funding or Scholarships	Offshore/TNE
High priority		China	[Active]								
		India									
		Japan	[Active]								
		South Korea	[Active]								
		South East Asia	Malaysia								
			Philippines								
			Indonesia								
			Singapore								
			Thailand								
			Vietnam								
Priority emerging		Americas	Cambodia								
			Laos								
			Myanmar								
			Brazil								
		Africa	Colombia								
			Peru								
			Chile								
			Nigeria								
Mature		Taiwan	Ghana								
		Europe	Hong Kong								
			United Kingdom								
			Spain								
			Germany								
		Middle East	Italy								
			Saudi Arabia								
			Kuwait								
			Iran								
		UAE									
		Papua New Guinea									

The scale of our key identified markets differ, but there are opportunities across all sectors



Source: Austrade Market Information Package. Note: refers to student visa enrolments

Markets identified through the Global Partnership Plan represent 80 percent of Queensland's current student enrolments.

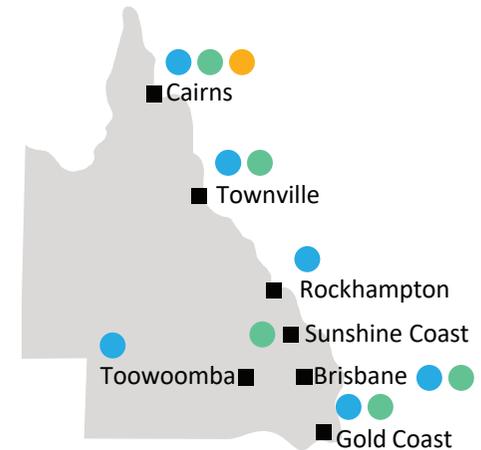
These markets also offer broad coverage for transnational delivery, government to government relationships and non-student visa markets.

High priority markets are representative of opportunities for the industry as a whole.

Study Queensland's role is to both support regional priorities and extend Queensland's focus to ensure strategic opportunities are realised

Each region has their own priority markets which are supported through the Global Partnership Plan. The key markets for each region as identified by established and emerging regional clusters is shown below.

	Established study clusters					Emerging study clusters	
	Brisbane	Gold Coast	Cairns	Townsville	Sunshine Coast	Rockhampton	Toowoomba
High priority	China	●	●	●	●	●	●
	India	●					
	Singapore			●			
	Japan	●	●	●		●	
Priority emerging	USA		●	●			
	Brazil	●	●		●		
	Colombia	●	●		●		
Mature markets	PNG		●				



The Global Partnership Plan complements and extends regional priorities to ensure that Queensland's approach to IET is strategic and future focused

Study Queensland also supports our regional partners – including study clusters in Greater Whitsundays, Ipswich and Wide Bay/ Fraser Coast. We will work with all providers to support them realise the opportunities they are pursuing.

30 markets in total

22 additional markets are identified as regional opportunities. These include traditional markets of strength for Queensland but also high potential markets and emerging opportunities for Queensland.

Five cross-market initiatives

Cross-market initiatives aimed at supporting growth across a number of markets.

There are a number of ways to get involved with the Global Partnership Plan

Visit



Visit the [website](#) to learn more about the initiative and supporting activities.

Connect



Connect with [Study Queensland](#)

Feedback



Share your [feedback and ideas](#) on existing and new activities.

Join



Join a [study cluster](#) in your local region.

Create



Build a [consortium](#) and apply for the next round of the IET Partnership Fund.

Learn



Attend the [2019 IET Summit in Brisbane](#)

The Business Development Manager network will continue to provide ongoing support

India	Hema Ravishankar	Latin America	Andres Gebauer
Japan	Arisa Kajiyama	North America	Javier Jativa
China	Jianwen Xu- Shanghai Tequila Cao- Guangzhou Julia Zhang- Chengdu Makia Ma- Beijing	Europe	Cindy Callander
Indonesia	Irma Irsyad	Hong Kong	Diana Liu
South East Asia	Tomoko Nakanishi	Taiwan	Sabrina Li
Korea	Sunah Kim	Middle East	David Hackett

Our Business Development Manager (BDM) Network have invaluable in-market knowledge and networks. They are able to assist Queensland education and training providers in business development through:

- offshore regulatory and trend monitoring;
- in-market facilitation, including marketing and promotion;
- local industry and government partner identification and business matching.



Market briefs

This section outlines all market briefs for identified priority markets. It outlines the goals and context for each market, opportunities that exist and an outline of planned activities over the upcoming 12 months.

Note: each market page can print as a single document over two sides.



CHINA

The scale of the Chinese market means it is a high priority for Queensland

MARKET OBJECTIVES

1. Leverage existing government to government relationships, to increase inbound enrolments and offshore opportunities – including through strengthening the 30 year sister state agreement with Shanghai.

2. Increase brand awareness in market, through increased collaboration in the fields of tourism and innovation.

SECTOR FOCUS

All sectors will be a focus for China given the scale of the market.

REGIONAL FOCUS

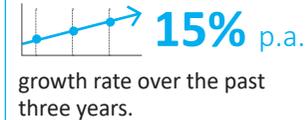
All regions of Queensland have a strategic focus on China as an IET market.

OPPORTUNITY

Market size and growth potential

26,700

onshore student visa enrolments in Queensland in 2017.



Performance relative to other states

11.5% market share, significantly below the 20% target for Queensland overall.

► **0.1 percentage point** Queensland's performance has been comparable to other states, with both growing at 15% p.a. over the past 3 years.

Opportunities

Sector	Growth	Queensland rank	HIGHER ED opportunities exist in Mgmt. & Commerce, and opportunities to diversify into IT and Engineering. ELICOS enrolments primarily represent a pathway to HE for the Chinese market.
Schools	+39%	1	
VET	+2%	6	
ELICOS	+16%	1	
Higher Ed	+12%	1	

SCHOOLS enrolments across primary and high school. There are opportunities to grow in regional areas.

KEY MARKET DRIVERS

Policy drivers

Domestic quality

Efforts to increase the quality of China's domestic higher education sector may reduce outbound student numbers overall. This may present a risk given the high concentration levels of Chinese students.

Australia's student visa settings

Currently favourable to students from China, making it well placed relative to other potential destinations.

Student drivers

Parental preferences

Parental preferences are a key student driver in educational investment in China.

Quality

Provider and course quality is a key driver for the Chinese market, as well as institution reputation.

Agents

Most inbound enrolments across all sectors, levels and fields come through agents.

Key relationships

Sister state relationship

Including Shanghai, Chengdu, Guangdong and Chongqing.

Chinese community

Supporting the local community to become advocates for Queensland as a study destination.

Agents

Working closely with agents to showcase Queensland and promote it as an education destination.

Industry

Identifying opportunities for offshore delivery.



CHINA

The scale of the Chinese market means it is a high priority for Queensland

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Study cluster Led initiatives

For more information contact one of our China BDMs

Jianwen Xu – Shanghai • Tequila Cao – Guangzhou • Julia Zhang – Chengdu • Makia Ma - Beijing

Or contact: studyqueensland@tiq.qld.gov.au



INDIA

India is a key growth market nationally and a high priority for Queensland

MARKET OBJECTIVES

1. Increasing onshore enrolments from India, across Postgraduate and Undergraduate qualifications in line with broader national growth trends – with an emphasis on course diversity and sustainability.

2. Supporting offshore and TNE delivery in India, through targeted activities focused on building provider capacity and **matching business skill needs to relevant providers**.

SECTOR FOCUS

Targeted sector focus onshore in Postgraduate, Undergraduate qualifications and offshore training through TNE (particularly in VET).

REGIONAL FOCUS

India is a strategic focus of the Gold Coast region.

OPPORTUNITY

Market size and growth potential

11,750

onshore student visa enrolments in Queensland 2017.



Performance relative to other states

13.4% market share, significantly below the 20% target for Queensland overall.

▼ **5.2 percentage points**
Queensland has not grown as strongly as other states with Australian enrolments growing at 12% p.a.

Opportunities

Sector	Growth	Queensland rank	HIGHER ED, Australian providers have grown strongly. Over 70% HE students study at Masters level, but Undergraduate is also growing quickly. IT and Engineering are areas Queensland could grow, and Mgmt. and Commerce continues to be important for the market.
Schools	+4%	16	
VET	-10%	3	
ELICOS	+30%	9	
Higher Ed	+18%	2	

VET opportunities will primarily come offshore through TNE, following decline in onshore VET delivery.

KEY MARKET DRIVERS

Policy drivers

Offshore VET

Cost of offshore VET delivery can discourage market entry for Australian providers.

Student drivers

Domestic quality and access

Increase in domestic incomes, population growth, and aspiration means growth has exceeded available places domestically. Concern with the quality of domestic market provides opportunities.

Employment Opportunities and Migration

Key driver for students, both in terms of internships, employment during study and graduate outcomes.

Agents

Highly rated factor in choosing a study destination for Indian students.

Key relationships

Regional focus on southern India for offshore delivery

Especially the states of Karnataka, Andhra Pradesh, Telengana, Tamil Nadu, Kerala, Maharashtra and Gujarat.

Industry

Working with industry to identify skills and training requirements of large and medium sized firms within India.

Agents

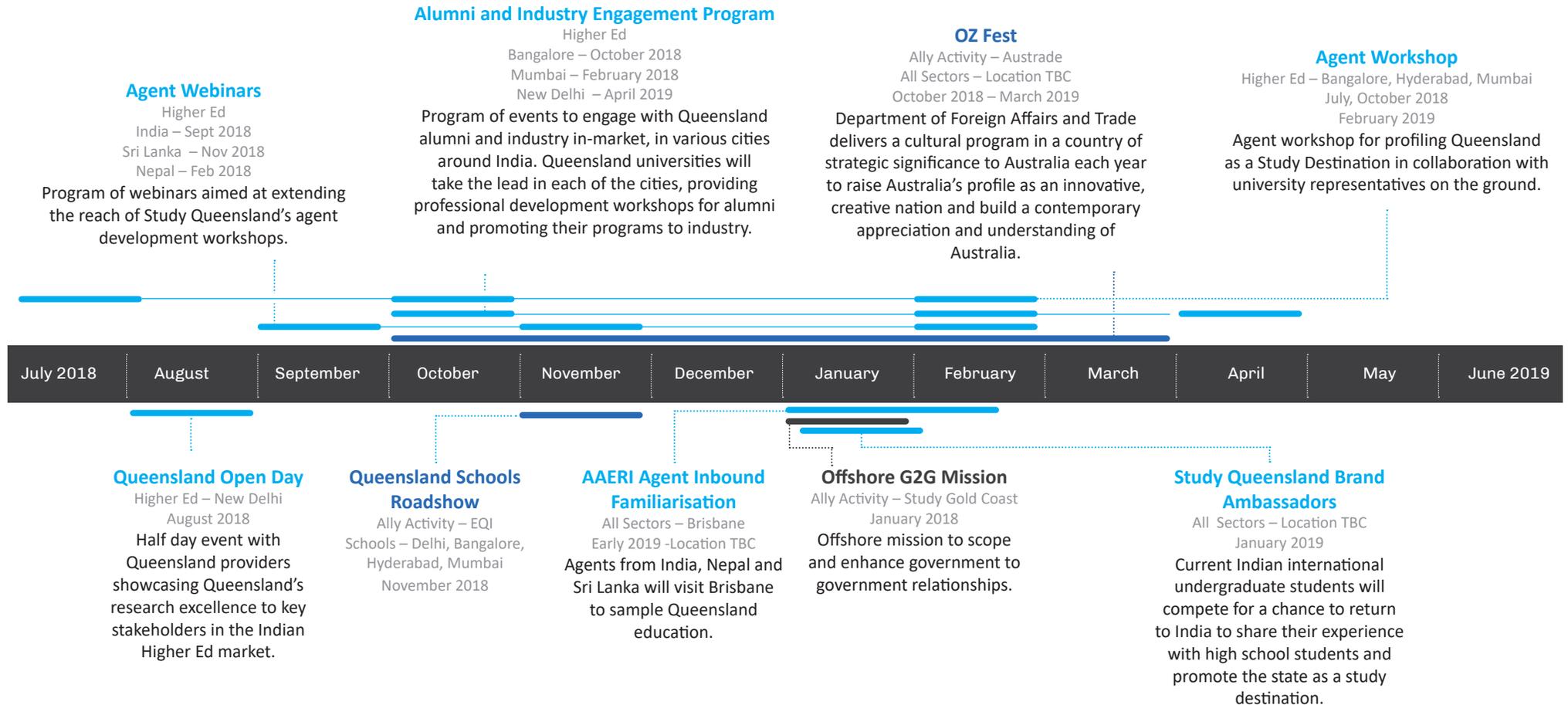
Engagement with agents will focus on raising the profile of Queensland as a study destination.



INDIA

Activities will support opportunities that exist across Higher Education and in TNE/offshore delivery

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Study cluster led initiatives
- Ally Led initiatives

For more information contact our India BDM
Hema Ravishankar

Or contact: studyqueensland@tiq.qld.gov.au



INDONESIA

Indonesia is a market where Queensland significantly underperforms with only 5% of market share. It will be a significant market focus.

MARKET OBJECTIVES

1. **Increasing awareness** of Queensland as a high quality study destination in Indonesia.

2. **Enhance relationship** with Indonesian government scholarship agencies for postgraduate qualifications and offshore ELICOS training opportunities.

SECTOR FOCUS

Higher Ed across Undergraduate, Postgraduate, scholarships and Research, as well as VET and offshore delivery.

OPPORTUNITY

Market size and growth potential

1,000

onshore student visa enrolments from Indonesia in 2017.



Performance relative to other states

5.1% market share,

very low for a major market and significantly below the 20% target.

▲ **0.2 percentage points**
Queensland has picked up market share, starting from a low base.

Opportunities

Sector	Growth	Queensland rank	HIGHER ED is a priority sector for Indonesian students. Almost half of all Indonesia students in Australia study Higher Ed.
Schools	-2%	26	Mgmt. and Commerce is the largest field, and continues to grow.
VET	+7%	28	
ELICOS	-5%	29	
Higher Ed	+5%	13	

Indonesia is primarily a **UNDERGRADUATE MARKET**, but **POSTGRADUATE** is growing quickly. The market also has a high proportion of research students.

KEY MARKET DRIVERS

Policy drivers

Government funding With recent funding allocation (estimated at 30% of all scholarship fund) to pay for VET.

Offshore opportunities Government approval of 5-10 foreign universities to operate locally, each by partnering with private university by mid 2018.

Student drivers

Return on investment International education is seen as more and more important to international career prospects for Indonesian students, but value must be clear.

Local communities The diaspora of Indonesians in Australia is a key driver for where students choose to study, primarily in Melbourne and Sydney.

Key relationships

Sister State Agreement with Central Java will be leveraged for increased opportunities for Queensland providers.

Government and Private Scholarship Providers Including DIKTI, MORA, Pusbindiklatren, LPDP and Coffey.

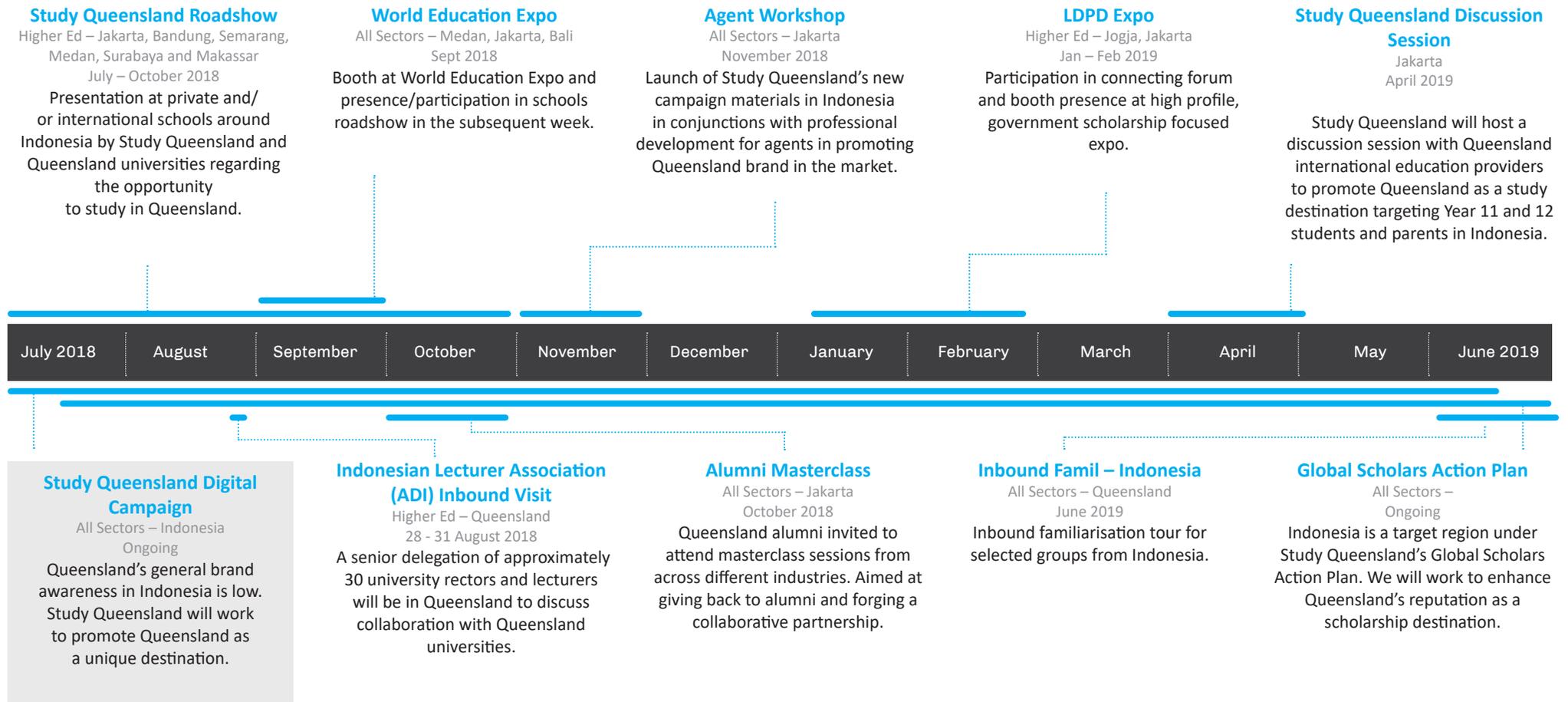
Professional Development Engagement will be targeted to the Ministries of Manpower, Religious Affairs and Home Affairs on the back of successful offshore courses.



INDONESIA

Several initiatives and activities will be delivered to support Queensland in the Indonesian market

ACTIVITIES FOR 2018-19



KEY

Study Queensland Led Initiative

For more information contact our Indonesia BDM

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SOUTH EAST ASIA

Efforts will focus on five key markets in the region – Philippines, Malaysia, Singapore, Thailand and Vietnam. As well as a further three emerging markets – Cambodia, Laos and Myanmar

MARKET OBJECTIVES

1. Increasing awareness of Queensland as a high quality study destination across key South East Asian markets.

2. Enhancing government to government partnerships to leverage opportunities in HE, VET and research.

3. Better understand emerging markets to prioritise new opportunities.

SECTOR FOCUS

All sectors with a wide range of opportunities targeted based on specific market.

REGIONAL FOCUS

Singapore is a strategic focus of the Townsville region.

OPPORTUNITY

Market size and growth potential

11,850

onshore student visa enrolments from the five SE Asia high priority markets in 2017.

3.8% p.a.

growth rate, with decline in Vietnam and Singapore and growth in the other three key markets.

Performance relative to other states

10.5% market share,

ranging from 8% for Vietnam, up to 17% for Singapore.

0.5 percentage points

dropping most significant market share in Malaysia (-2.4p.p.) and gaining strongly in the Philippines (+3.1p.p.)

Opportunities

Sector	Growth	Key Market	SCHOOLS, Vietnam is the largest market with strong growth.
Schools	+10%	Vietnam	
VET	+13%	Thailand	VET is a priority in all markets except for Singapore.
ELICOS	-4%	Thailand	Thailand is the largest ELICOS market. Vietnam the second largest has declined significantly.
Higher Ed	+1%	Malaysia	

Malaysia is the largest market for **HIGHER ED** and has grown for Queensland and Aus. Vietnam and Singapore are also key undergraduate and Postgraduate markets.

KEY MARKET DRIVERS

Policy drivers

Scholarships Are a key policy driver in several markets with government funding highly important.

Skills Training Relative decline in demand for Higher Ed has coincided with push for English language and skills training in a number of SE Asian markets.

Qualification Recognition May hinder growth in the region.

Student drivers

Financial costs and employment Cost-effectiveness is a key determinant of where students will look to study overseas. Availability of work during study is also important for many students from these markets.

Key influencers These include parents, school counsellors, teachers, friends and agents.

Diaspora The presence of communities in cities is a big driver on study destination, particularly for Vietnam and the Philippines.

Key relationships

Government relationships Enhancing government to government partnerships, specifically targeting education bureaus and science ministries.

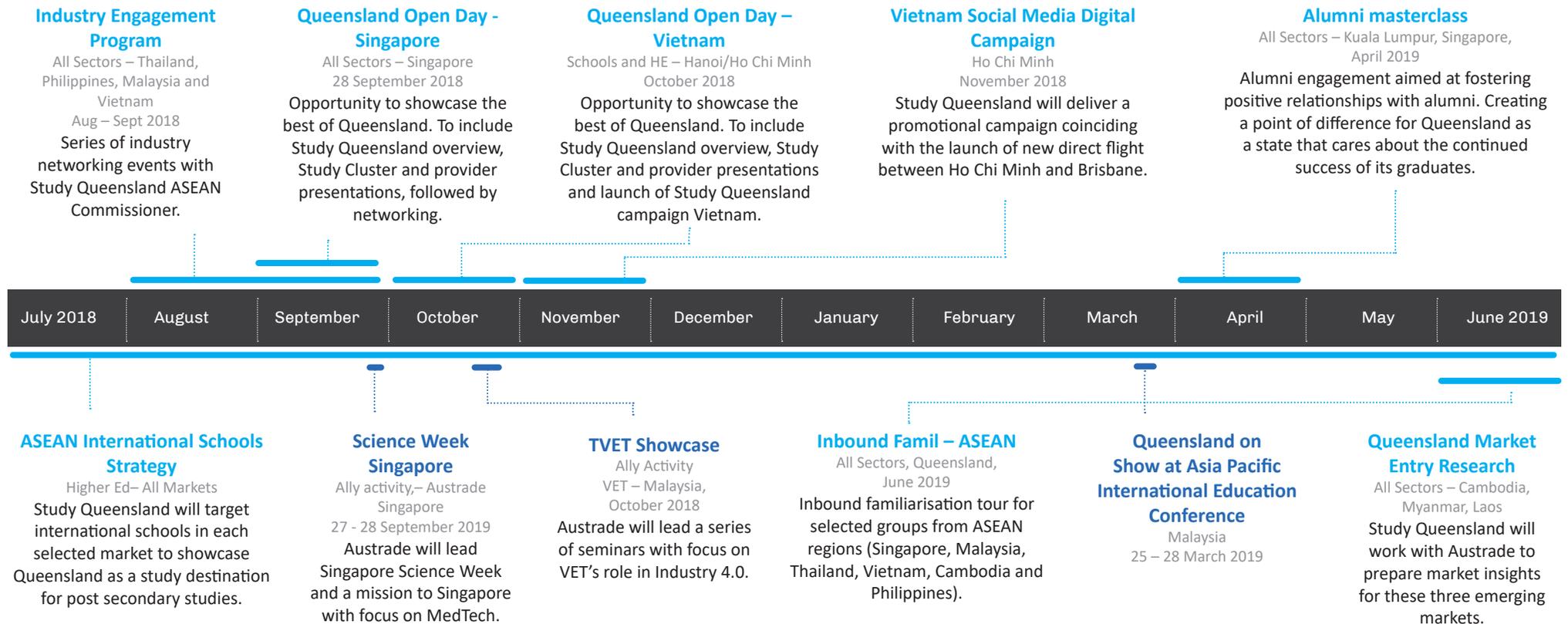
Engagement focus Curriculum licensing, scholarships and qualification accreditation agencies will be a key focus across markets.



SOUTH EAST ASIA

Efforts will focus on five key markets in the region – Philippines, Malaysia, Singapore, Thailand and Vietnam. As well as a further three emerging markets – Cambodia, Laos and Myanmar

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact our SE Asia BDM

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JAPAN

Japan is a traditionally important market for Queensland which continues to grow

MARKET OBJECTIVES

1. Continue to leverage existing strengths in government to government relationships, and provide further opportunities for providers across a range of sectors.

2. Build on existing strengths, in education, tourism, schools and ELICOS with ongoing promotion of Queensland as a destination.

SECTOR FOCUS

Focus on key market strengths in education, tourism, schools, research and ELICOS. VET will also be an area of focus.

REGIONAL FOCUS

Japan is a strategic focus of the Cairns, Rockhampton, Brisbane and Gold Coast regions.

OPPORTUNITY

Market size and growth potential

5,350

enrolments, making Japan the sixth largest market for Queensland in 2017.

10.7%

p.a. growth rate, demonstrating strong growth.

Performance relative to other states

33.2% market share,

Queensland has the largest market share with more than three-in-ten studying in Queensland.

▼ 0.4 percentage points

Market share has declined moderately based on strong performance from other states.

Opportunities

Sector	Growth	Queensland rank	Notes
Schools	+39%	1	SCHOOLS , opportunities exist to continue to attract younger students.
VET	+2%	6	Mgmt. & Commerce is the key field for VET .
ELICOS	+16%	1	ELICOS is a key strength for Queensland in this market.
Higher Ed	+12%	1	

KEY MARKET DRIVERS

Policy drivers

Global Outlook

Japan's private universities, colleges and VET schools – especially those in regional cities – are looking to increase their appeal to prospective domestic students by embedding study abroad programs.

Curriculum Guide

Shift in Japanese Curriculum Guide is underway and opening up greater opportunities for Queensland IET providers.

Student drivers

Return on investment

Students want an affordable, quality global experience that enhances global communication skills and employment outcomes.

Safety

Many parents see this as primary concern, recent uncertainty in Europe and USA has seen increased interest in perceived safer alternatives.

Key relationships

MEXT

Deliver on plans to extend existing partnership with Japan's Ministry of Education, Culture, Sports, Science and Technology on Tobitate!

Government

Further leverage extensive MOUs and bilateral agreements - the full list is available here.

Agents

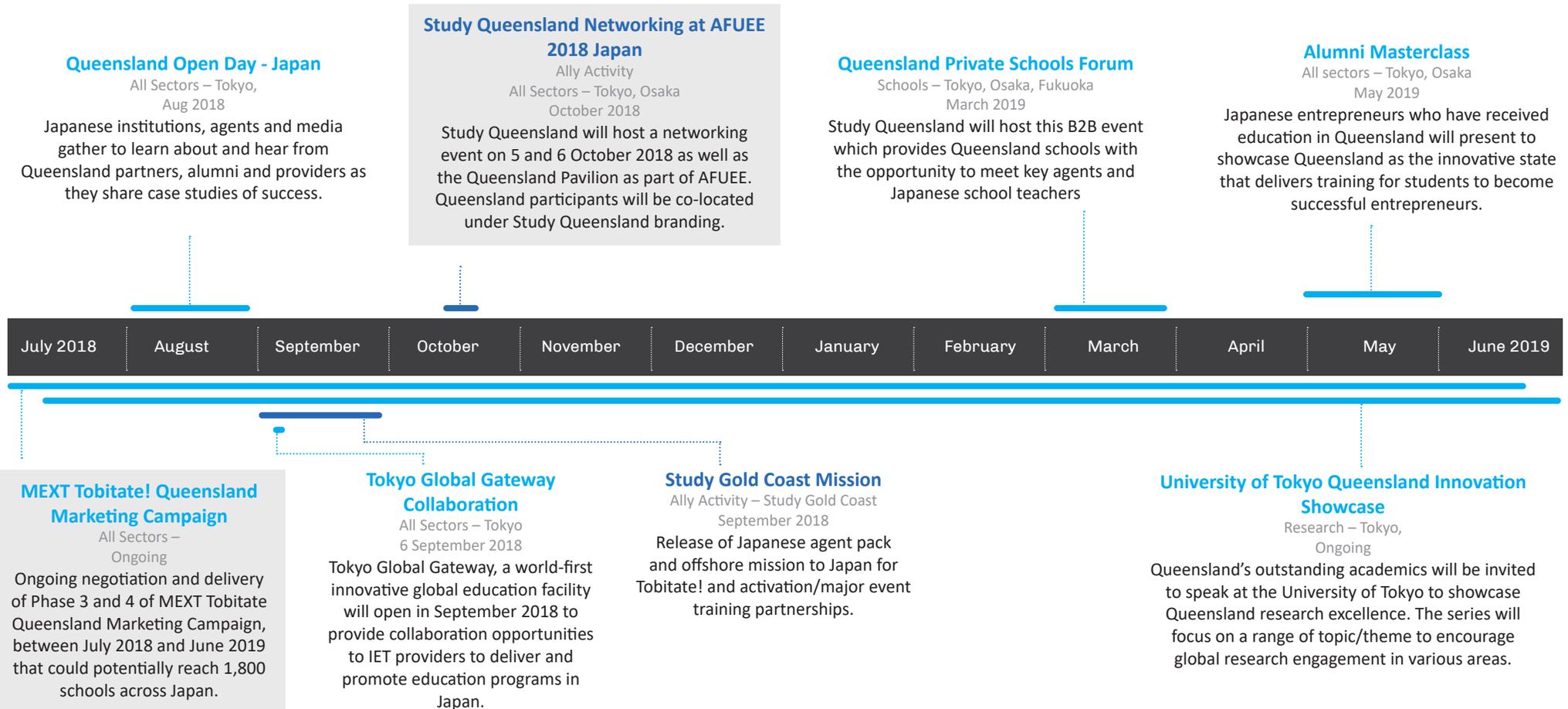
Enhance trusted partnership in promoting Queensland.



JAPAN

A number of activities will be delivered, both locally and in market to support this opportunity

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact our Japan BDM
Arisa Kajiyama

Or contact: studyqueensland@tiq.qld.gov.au



SOUTH KOREA

South Korea is an important market for Queensland with steady growth

MARKET OBJECTIVES

1. Build on existing strengths in VET and ELICOS to ensure Queensland is the priority destination for Korean students.

2. Continue to leverage government to government relationships to respond to local sector needs.

3. Increase brand awareness as a high quality study destination, building on strengths in shorter length programs.

SECTOR FOCUS

All sectors including, schools, ELICOS, VET, Undergraduate, Postgraduate and Research.

OPPORTUNITY

Market size and growth potential

7,200

enrolments, making South Korea the fourth largest market for Queensland in 2017.



Performance relative to other states

23.1% market share,

Queensland has a strong market share with one-in-four students in Australia studying in Queensland.

▼ **0.3** percentage points
Competition from elsewhere has meant Queensland market share has declined over the past three years.

Opportunities

Sector	Growth	Queensland rank	VET opportunities are primarily in VET in Mgmt. and Commerce with some opportunities to diversify.
Schools	-5%	6	Many students from South Korea study ENGLISH LANGUAGE courses on non-student visas (not captured in this data).
VET	+19%	2	
ELICOS	-8%	6	
Higher Ed	-7%	8	

KEY MARKET DRIVERS

Policy drivers

Youth Unemployment High rates of youth unemployment are pushing students to enhance employability through global experiences.

K-Move Korean government initiative aimed at increasing international mobility of young Koreans.

Student drivers

Employment Outcomes Practical experience such as internships, and employment outcomes are key priorities for Korean students.

Price sensitive South Korea is a price-sensitive market, which may give Queensland a slight advantage over other states.

Key relationships

Provincial level On-going relationships with Provincial Offices of Education will continue to be developed.

Government Extensive existing MOUs and bilateral agreements will be leveraged – the full list is available here.

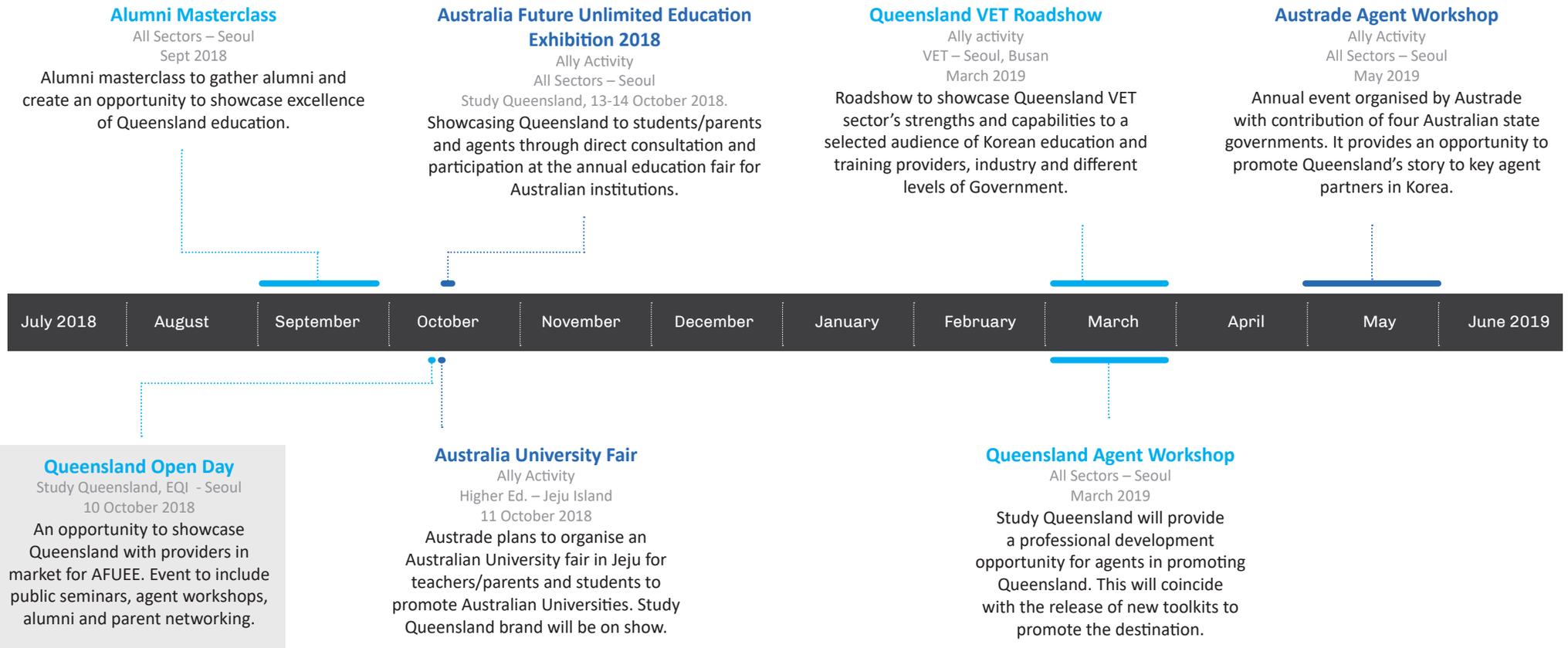
Agents Korea remains an agent driven market, important to nurture and enhance relationships with key agents, especially Australian focused agents.



SOUTH KOREA

A number of activities will be delivered, both locally and in market to support this opportunity

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact our Korea BDM
Sunah Kim

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LATIN AMERICA

Attention will focus on two large markets – Brazil, Colombia – and two supporting markets – Chile, and Peru

MARKET OBJECTIVES

1. To build on key market strengths in Brazil and Colombia through diversifying in other sectors, including Higher Ed.

2. To grow in emerging markets, namely Chile and Peru, in areas such as VET and ELICOS.

3. Share study stories and relate life experience of current students in Queensland.

SECTOR FOCUS

All sectors including, ELICOS, VET, Undergraduate, Postgraduate, and research.

REGIONAL FOCUS

Latin America is a strategic focus for the Gold Coast, Sunshine Coast and Brisbane regions.

OPPORTUNITY

Market size and growth potential

18,800

onshore student visa enrolments from the four Latin American high priority markets in 2017.

19.6% p.a. growth rate, with growth of more than 14% in all markets.

Performance relative to other states

27.8% market share, with all target markets above 18%.

▲ 0.6 percentage points market share increase, gaining on other states in Brazil and Peru, but not in Colombia and Chile.

Opportunities

Sector	Growth	Key Market	
Schools	+3%	n/a	Brazil is the largest HIGHER ED market in the region with clear opportunities to convert strengths in other sectors to HE. Mexico may provide an opportunity for study abroad.
VET	+40%	Brazil	
ELICOS	+16%	Brazil	
Higher Ed	+3%	Brazil	

There is strong growth across the board for **VET** and all markets have a focus on VET.

ELICOS is a key product across all these markets. Brazil and Colombia are in the top three Queensland markets for the sector.

KEY MARKET DRIVERS

Policy drivers

PRINT initiative

A new Brazilian initiative launched in November 2018 seeking to improve university research programs through international partnerships – following the end of ‘Science without borders’.

Improved English proficiency

Government policies in countries such as Chile and Peru continue to support bilingualism, providing opportunities in ELICOS.

Student drivers

Rankings

Institution rankings are a key driver for the Higher Ed market based on government scholarships policy.

Cost

Price is a key driver for many students from Latin American markets.

Work rights

The ability to work while studying is important to many students from these markets.

Sector choice

Most students from these markets study ELICOS and/or VET. Many apply for visas onshore for these sectors.

Key relationships

Research Bodies

Enhance and leverage partnerships with research bodies

MOUs

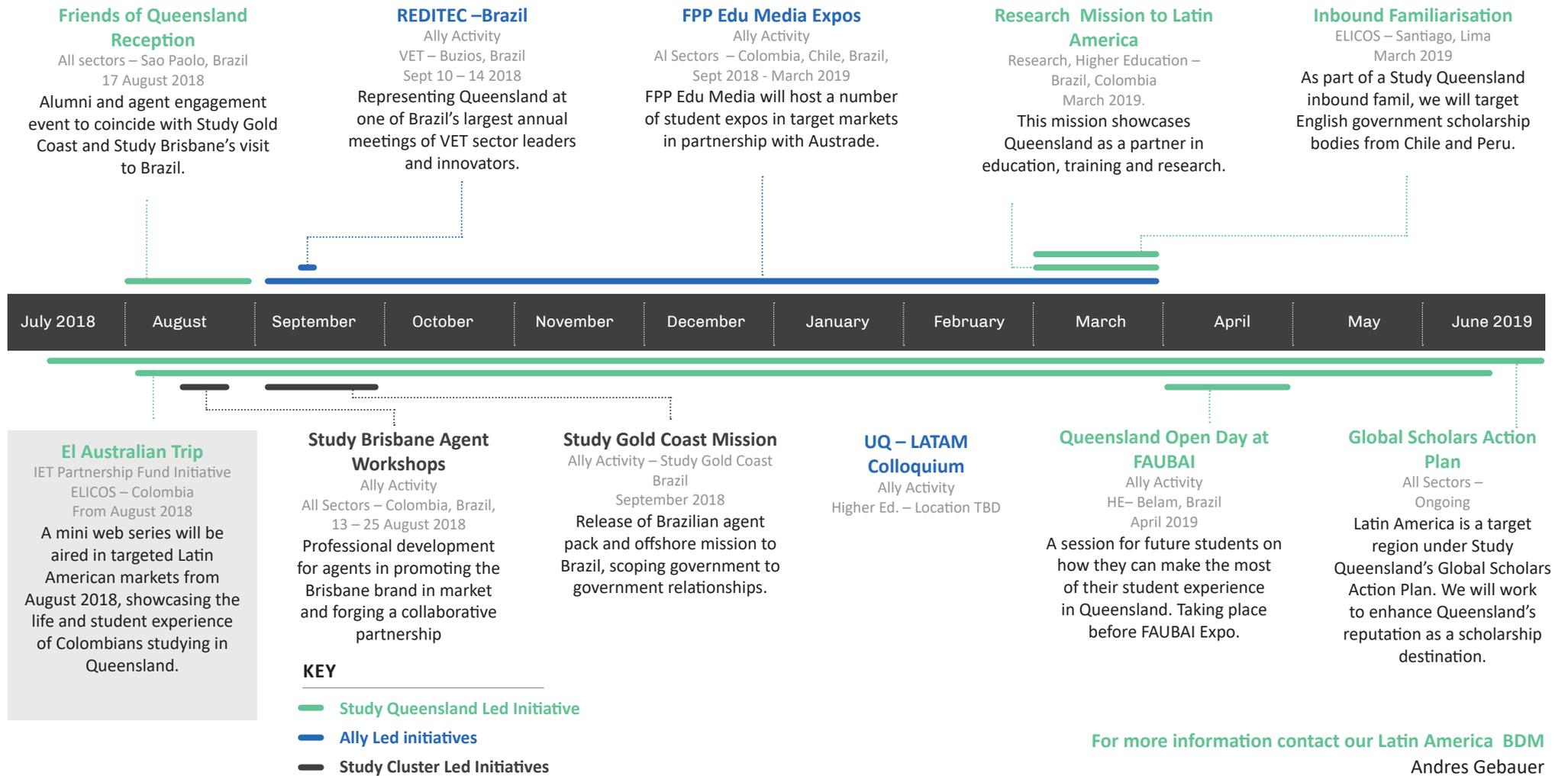
Including recent agreements with the Colombian Government and with the Brazilian National Council for Science and Technology will be leveraged.



LATIN AMERICA

Attention will focus on two large markets – Brazil, Colombia – and two supporting markets – Chile, and Peru

ACTIVITIES FOR 2018-19





AFRICA

Two growing markets will be prioritised in Africa – Nigeria and Ghana

MARKET OBJECTIVES

1. Promote Queensland as a preferred destination for African scholarship students.

2. Develop clear understanding of market opportunities through value adding market research activities.

SECTOR FOCUS

Study Queensland will adopt a targeted approach with a focus on Undergraduate, Postgraduate and research.

OPPORTUNITY

Market size and growth potential

813

enrolments in the two target markets; half of all sub-Saharan enrolments in 2017.

46.6% p.a. growth rate, with 51% p.a. growth in Nigeria and 21% in Ghana.

Performance relative to other states

22.5% market share, with 24% market share for Nigeria and 14% for Ghana.

▲ 6.7 percentage points gaining almost 9% market share in Nigeria, but losing market share in Ghana to other states.

Opportunities

Sector	Growth	Nigeria rank
VET	+85%	19
Higher Ed	+39%	19

These markets make up 300 VET students studying across all levels. The HIGHER ED market is 500 strong with most enrolments at Postgraduate level.

KEY MARKET DRIVERS

Policy drivers

Large and young population

Nigeria is a large and growing population with 187 million people and over 40% under the age of fourteen, the largest of all African nations.

Growing economy and middle class

With significant recent growth and the largest economy in Africa, Nigeria's middle class is growing and makes up approximately 20% of these two nations' populations.

Limited domestic capacity

Resulting in many being turned away from domestic Higher Ed institutions.

Student drivers

UK as a key study destination

Nigerian students studying internationally will travel to the United Kingdom. Nigeria is likely to become the second largest source market for Postgraduate students in the UK.

Preference for course of study

As opposed to institutional reputation, which may benefit Queensland.

Scholarships

Scholarship availability drives student decisions in a number of key African markets.

Key relationships

Australian Government

Including working with Austrade and the Australian High Commission and Embassies, to align activities in market.

Palladium

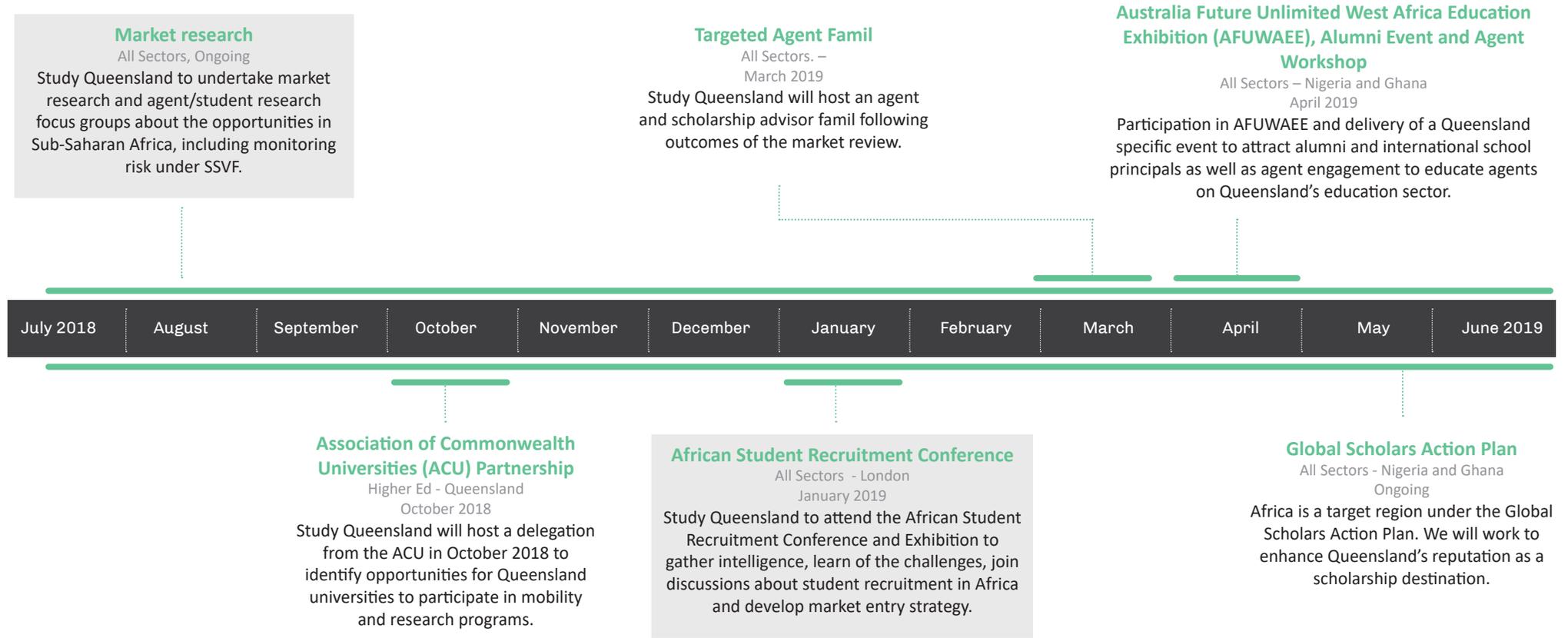
Leverage relationship with managing contractor for Australia Awards to help support scholarship students from Africa.



AFRICA

Two growing markets will be prioritised in Africa – Nigeria and Ghana

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact Study Queensland
studyqueensland@tiq.qld.gov.au



EUROPE

Efforts will focus on four key markets – Spain, Germany, Italy and the United Kingdom

MARKET OBJECTIVES

1. Promote Queensland as the premier English-speaking destination for European students.

2. Enhance Queensland’s research profile to leverage on R&D investments in Germany and UK.

3. Grow non-award scholarships and short course program enrolment.

SECTOR FOCUS

All sectors including ELICOS, VET, Undergraduate, Postgraduate, and research.

OPPORTUNITY

Market size and growth potential

7,150

enrolments in the target markets, representing over half of all European enrolments in 2017.

9.0% p.a.

growth rate, with strong growth in Spain and Italy and modest growth in the United Kingdom.

Performance relative to other states

23.1% market share, with all markets above 15%.

▲ 0.4 percentage points gaining almost 5 p.p. in Spain, and dropping most significant market share in Germany and the UK.

Opportunities

Sector	Growth	Key Market	
Schools	+10%	Italy	For SCHOOLS , Italy and Germany are the largest European markets.
VET	+11%	Spain	UK, Spain and Italy are all VET markets with strong growth.
ELICOS	+7%	Spain	
Higher Ed	+2%	Germany	Spain is the largest ELICOS market and has grown strongly.

Germany is the primary **HIGHER ED** market for Queensland.

KEY MARKET DRIVERS

Policy drivers

Brexit

Has potential funding and cost implications for both British and EU students which may make Queensland a more attractive study destination.

Free tertiary education

Free study in many EU countries, means potential students are very price sensitive.

English as teaching language

Increase in English as language of instruction at high school and university.

UK Research Collaboration

Increased support for co-authored research with Australian academics ahead of the launch of a £110m UK ‘fund for international collaboration’.

Student drivers

English language

Broad demand for English language study, education and non-award courses across European markets.

Employment opportunities

Post study work visa is a key student driver for many European students, particularly where opportunities at home are limited.

Key relationships

Alumni

Continue to engage with alumni as advocates for Queensland as a study destination.

Research partnerships

Including through the Queensland Hessen Agreement and the UK-UA research relationship.

Other relationships

Including working with Austrade and the Australian High Commissioners and Embassies, as well as the Commonwealth Enterprise and Investment Council.

Association of Commonwealth Universities (ACU) Partnership

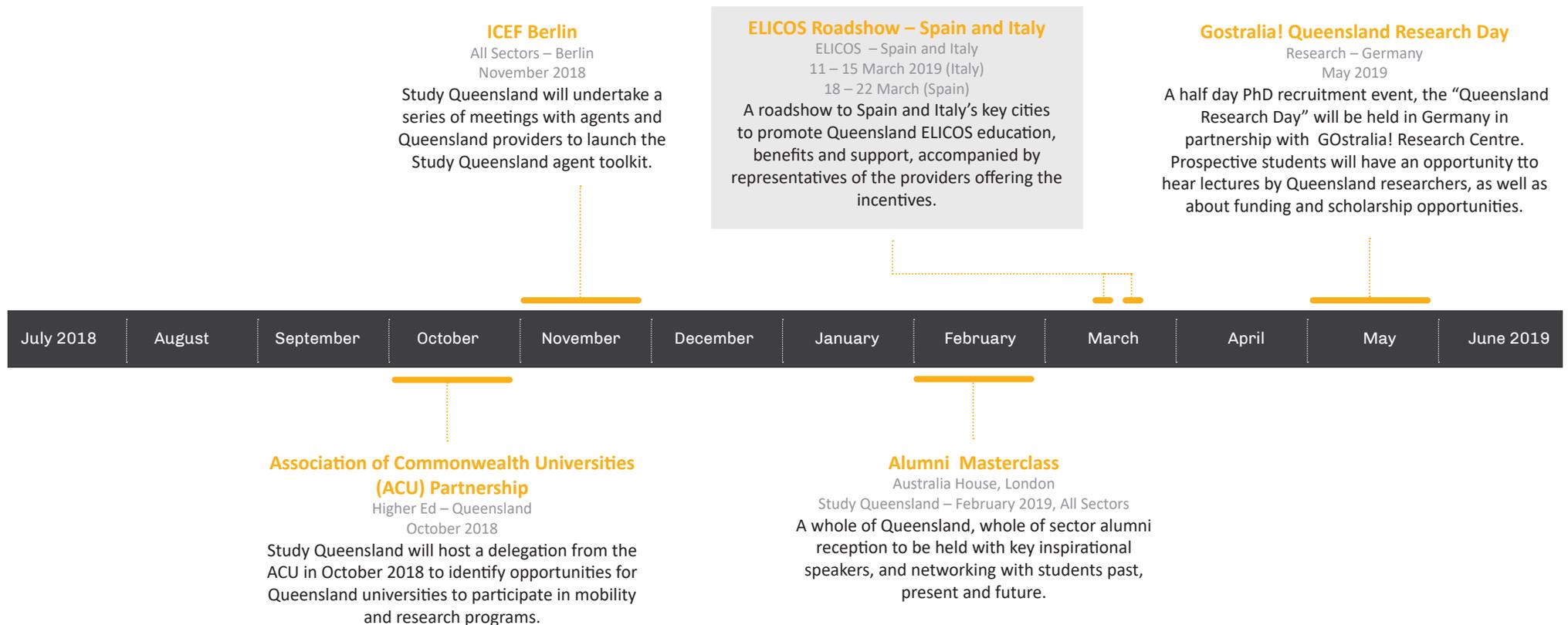
Including hosting a delegation in October.



EUROPE

Efforts will focus on four key markets – Spain, Germany, Italy and the United Kingdom

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact our Europe BDM
Cindy Callander

Or contact: studyqueensland@tiq.qld.gov.au



TAIWAN

Taiwan is a key market for Queensland, with a strong local diaspora

MARKET OBJECTIVES

1. Maintain position as primary destination for Taiwanese students in face of strong competition from other states.

2. Leverage existing government to government relationships, to increase inbound enrolments and offshore opportunities (including through strengthening the New Taipei City government partnership).

SECTOR FOCUS

All sectors including schools, ELICOS, VET, Undergraduate, Postgraduate, and research.

OPPORTUNITY

Market size and growth potential

5,230

enrolments, making it the seventh largest market for Queensland enrolments in 2017.

14.0% p.a.
growth p.a over three years, indicating very strong market performance.

Performance relative to other states

28.7% market share,
with Taiwan a key strength for Queensland's industry.

▼ **6.1** percentage points decline in market share, reflecting the strong performance of NSW and Victoria.

Opportunities

Sector	Growth	Queensland Rank
Schools	+3%	11
VET	+37%	4
ELICOS	-1%	7
Higher Ed	-3%	12

Opportunities exist in a number of key areas in all four sectors including student recruitment, offshore delivery, working holiday visa makers, study tours, teacher training and outbound mobility.

KEY MARKET DRIVERS

Policy drivers

New Southbound policy

Key policy driver which encourages Taiwanese institutions to prioritise partnerships with South East Asia, South Asia and Oceania – placing Australia at a distinct advantage.

Student drivers

Local education system

A lack of confidence in the local education system means many choose to study overseas.

Safety

Increased concerns about the U.S. as a study destination has meant more students are coming to Australia.

Career outcomes

Demonstration of career outcomes as a result of study abroad is a key driver.

Ranking of universities

Drives student decisions regarding provider preference.

Key relationships

Government

Government to government relationships with the Ministry of Education, the Ministry of Labor and the Ministry of Science and Technology and New Taipei City Government.

Sister City Relationship

Brisbane + Kaohsiung
Gold Coast + Taipei and Tainan
Ipswich + Nantou and Hsinchu County

Agents

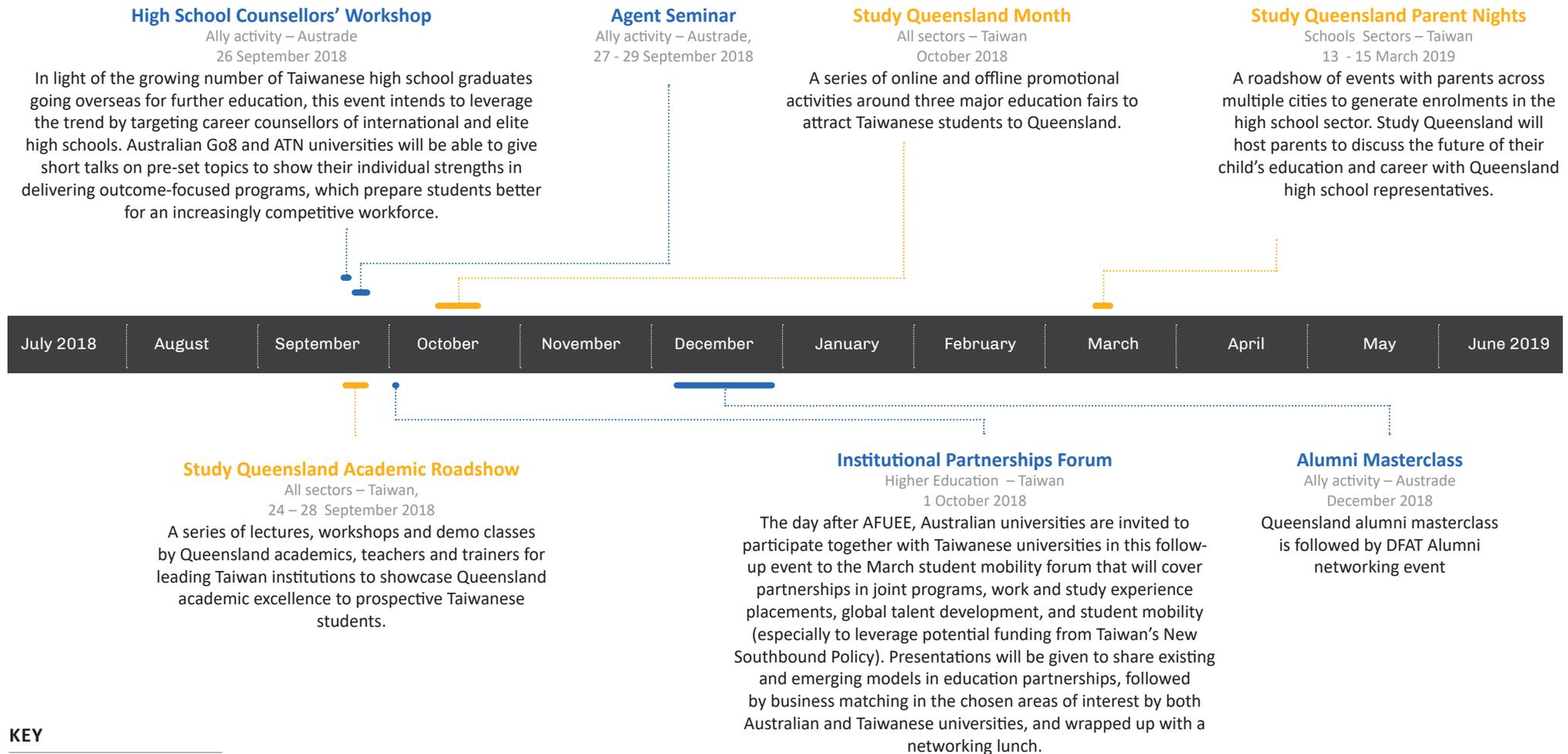
Play a significant role in directing student destination and provider preferences.



TAIWAN

Taiwan is a key market for Queensland, with a strong local diaspora

ACTIVITIES FOR 2018-19



KEY

— Study Queensland Led Initiative

— Ally Led initiatives

For more information contact our Taiwan BDM

Sabrina Li

Or contact: studyqueensland@tiq.qld.gov.au



HONG KONG

Hong Kong has always been a strength for Queensland and continues to offer growth

MARKET OBJECTIVES

1. Leverage existing government to government relationships, to increase inbound enrolments and offshore opportunities.

2. Maintain position as primary destination for students from Hong Kong, in face of strong competition from other states.

SECTOR FOCUS

All sectors including Schools, ELICOS, VET, Undergraduate, Postgraduate, and research.

OPPORTUNITY

Market size and growth potential

3,540

enrolments, making it the eighth largest market for Queensland enrolments in 2017.

9.2% p.a.

growth p.a over three years, indicating strong market performance.

Performance relative to other states

19.9% market share,

with one-in-five Hong Kong students in Australia studying in Queensland.

▲ 1.1 percentage points

with Queensland continuing to increase market share relative to other states.

Opportunities

Sector	Growth	Queensland Rank
Schools	-5%	7
VET	+9%	13
ELICOS	-8%	13
Higher Ed	-7%	4

SCHOOLS primarily for senior secondary, but there has been a recent increase in Junior Secondary.

In **VET**, Mgmt. & Commerce is a key field. There has also been growth in lower level qualification.

In **HIGHER ED**, Mgmt. & Commerce is also the primary field, but there has been strong growth in Health and Creative Arts, primarily in Undergraduate.

KEY MARKET DRIVERS

Policy drivers

Additional government funding

The VET sector has received additional funding from the Hong Kong Government to increase the local VET system.

Budget allocation

For 2018-19 has focused on health, aged care, training and education.

Student drivers

Agents

Agents are a key influencer in the Hong Kong market.

Institutional rankings

Many students from Hong Kong will research institutional rankings to assist in decision making.

Graduate employability

Personal prospects are a key determinant in decisions.

Key relationships

Agents

Hong Kong is an agent-driven market. Approximately 80% of students are recruited via agents for studying abroad.

Government

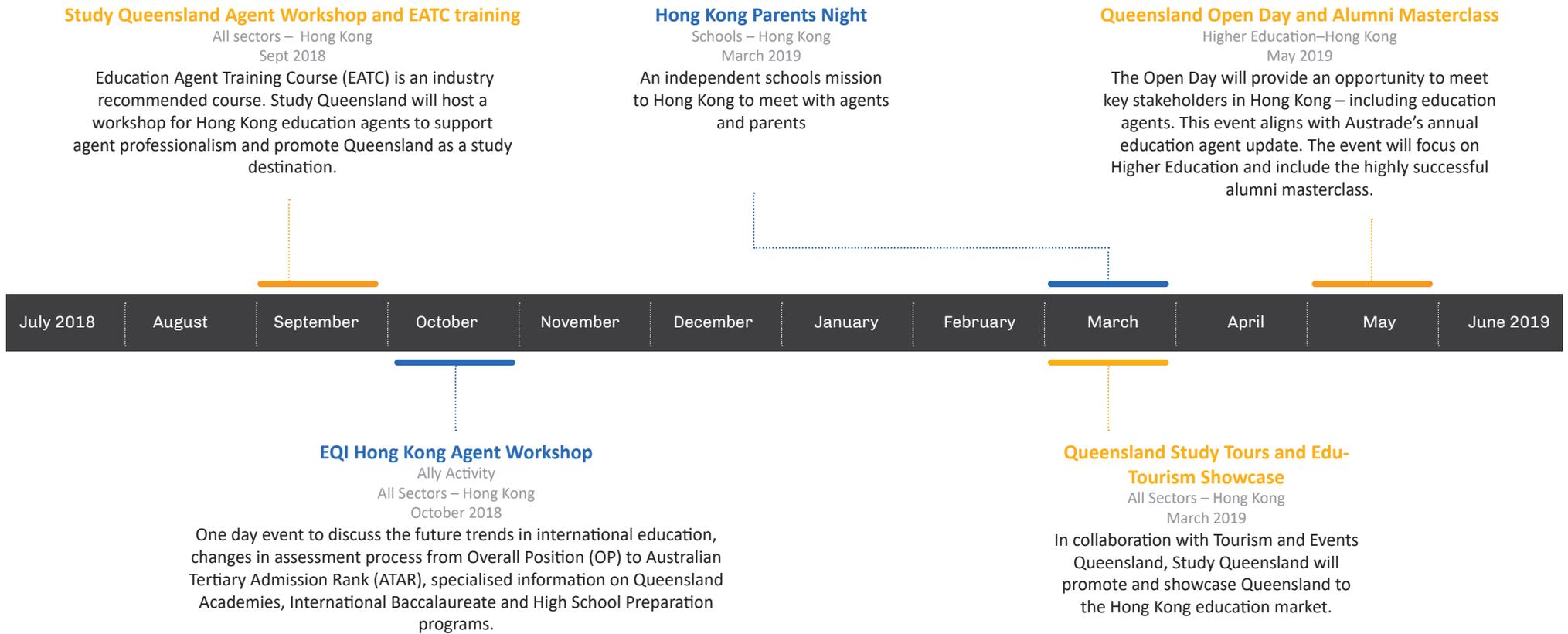
Existing relationship with a number of Hong Kong government agencies remain important in this mature market. A full list of MOUs and bilateral agreements can be found here.



HONG KONG

Hong Kong has always been a strength for Queensland and continues to offer growth

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact our Hong Kong BDM

Diana Liu

Or contact: studyqueensland@tiq.qld.gov.au



PAPUA NEW GUINEA

Queensland is Australia’s most popular destination for students from Papua New Guinea, with four-in-five of all national enrolments

MARKET OBJECTIVES

1. Diversify current strengths in PNG schools students to provide an opportunity for more to undertake tertiary study in Queensland.

2. Strengthen Queensland reputation through offshore and TNE delivery in PNG.

3. Grow scholarship students and development capacity programs.

SECTOR FOCUS

Study Queensland will adopt a targeted focus on schools and Undergraduate, as well as opportunities for delivery offshore.

REGIONAL FOCUS

Papua New Guinea is a strategic focus of the Cairns region.

OPPORTUNITY

Market size and growth potential

1,205
Enrolments from PNG – making it by far the largest market in the Pacific region in 2017.

2.0% p.a.
growth rate, demonstrating ongoing enrolment growth.

Performance relative to other states

80.4% market share,
market share, the largest for all priority markets for Queensland.

▲ 0.7 percentage points change in market share, with Queensland continuing to outperform other states despite a high base.

Opportunities

Sector	Growth	Queensland Rank	SCHOOLS is a key strength across all levels, with the majority of students studying in Cairns.
Schools	+0%	3	HIGHER ED is a growing market in PNG and is a similar size to school enrolments. Opportunities mainly in Undergraduate.
VET	-6%	21	
ELICOS	-4%	50	
Higher Ed	+11%	18	

VET opportunities for this market exist offshore through TNE.

KEY MARKET DRIVERS

Policy drivers

Australia Awards PNG

The Australian Government’s Australia Awards program continues to offer opportunities for PNG students to study in Queensland. More information on Australia Awards PNG can be found here.

Sports education framework

The PNG Government seeks to develop a sports education framework, to offer sports related programs from Diploma to university.

Student drivers

Cairns is the key market

Accessibility with close proximity, frequent air connections and similar environment climate attract PNG students to Cairns.

Preference for schools study

Many return home following study at school level, with relatively few transitioning to other sectors.

Family and Friends

The diaspora of Melanesians in Australia is a key driver for where students choose to study.

Key relationships

Government relationship

Including leveraging existing MOU with Papua New Guinea, and sister city relationship between Cairns and Lae.

Asia Pacific Training College (APTC)

TAFE Queensland will help to develop real skills for employment across the Pacific Island region, including PNG.

Coffey International

Leverage existing industry partnership.



PAPUA NEW GUINEA

Queensland is Australia’s most popular destination for students from Papua New Guinea

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact our relevant Trade Officer
Song-Yi Baek

Or contact: studyqueensland@tiq.qld.gov.au



THE MIDDLE EAST

Four key markets have been identified for the Middle East – Saudi Arabia, Iran, Kuwait and UAE

MARKET OBJECTIVES

1. Develop and build relationships with key government entities and private sector stakeholders in the HE & VET sector in the UAE, Saudi Arabia, Iran and Kuwait

2. Develop niche VET opportunities in the UAE, Saudi Arabia and Iran.

SECTOR FOCUS

Study Queensland will focus on key relevant sectors – including Undergraduate, Postgraduate, research and offshore/TNE.

OPPORTUNITY

Market size and growth potential

2,121

enrolments in the four target markets, over two-thirds of the region's enrolments in 2017. Saudi Arabia is the largest market.

16.7% p.a. growth rate, with significant decline in the region over 3 years.

Performance relative to other states

19.2% market share, market share, reflecting historically strong performance in these markets.

4.0 percentage points decline in market share over past three years, losing ground to NSW and Victoria. Decline across all markets.

Opportunities

Sector	Growth	Key market	In VET, offshore opportunities will emerge with changes in the regulation for RTOs. Saudi Arabia is the largest market for VET and ELICOS for Queensland and Australia.
VET	+19%	Saudi Arabia	
ELICOS	-16%	Saudi Arabia	
Higher Ed	-12%	Iran	

Saudi Arabia, Kuwait and Iran are the three largest markets for HIGHER ED. Strong Postgraduate and research focus for these markets.

KEY MARKET DRIVERS

Policy drivers

VET framework changes

VET is on the cusp of significant growth with changes in frameworks & regulations for RTOs.

Scholarships

A highly competitive market for government sponsored higher education scholarships.

Student drivers

Scholarships

Students are usually directed on choice of institution depending on a number of factors including university rankings and proximity to their home country.

Key relationships

Government

An MOU between Queensland and Abu Dhabi to be signed in 2018 will include education KPI's.

Scholarship Agencies

Abu Dhabi, Department of Education and Knowledge (ADEK), Abu Dhabi Police Scholarship Department, UAE Ministry of Presidential Affairs Scholarship Office, KHDA, Iran and Kuwait.

Austrade

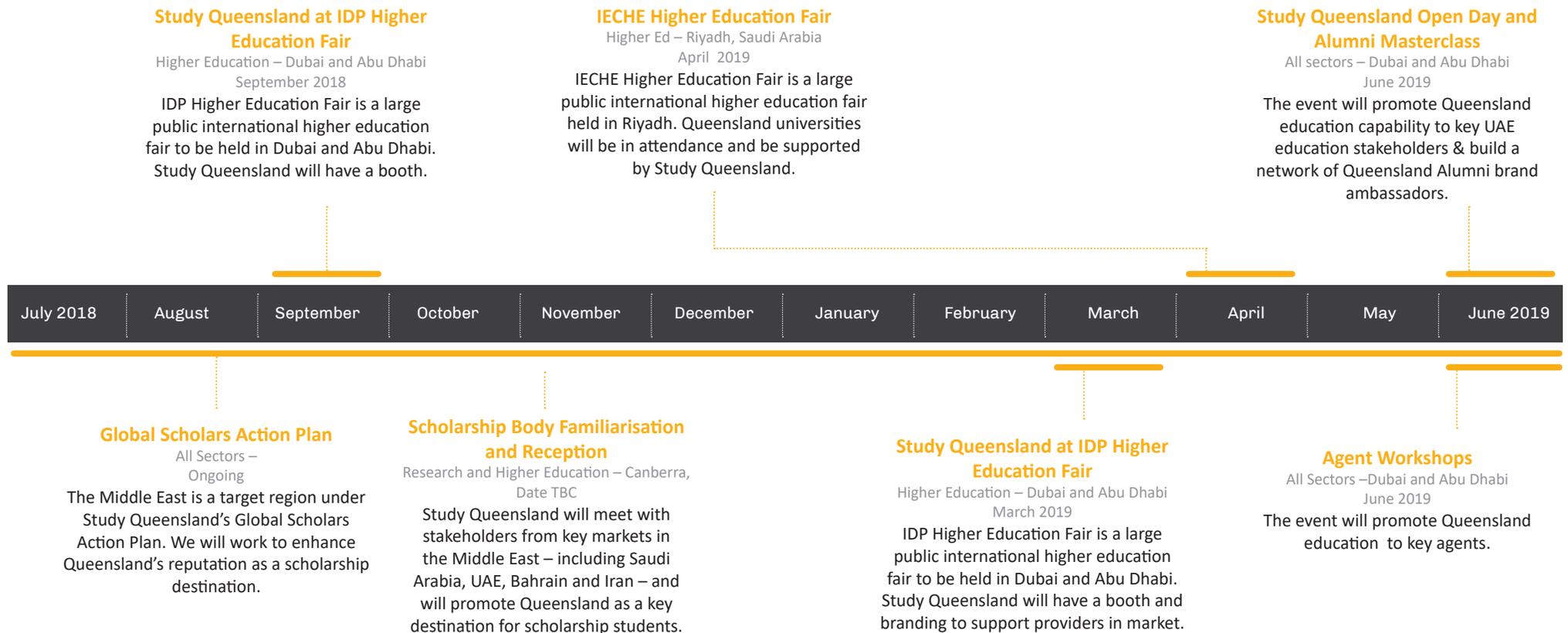
Work with Austrade to support market opportunities in Iran and Kuwait.



THE MIDDLE EAST

Four key markets have been identified for the Middle East – Saudi Arabia, Iran, Kuwait and UAE

ACTIVITIES FOR 2018-19



KEY

- Study Queensland Led Initiative
- Ally Led initiatives

For more information contact our Middle East BDM
David Hackett

Or contact: studyqueensland@tiq.qld.gov.au

Cross-market initiatives

This section provides an overview of the various cross-market initiatives that will be delivered as part of the Global Partnership Plan 2018-19.



Cross-market Initiatives

A series of cross-market initiatives will also be presented as part of the plan

Showcasing Queensland

2018-19 will see the rollout of the renewed Study Queensland Positioning Framework to better position Queensland as a global destination for education, training and research. The Study Queensland website and digital channels will be overhauled, along with a focus on regional integration for the 10 Queensland study clusters. A range of campaigns promoting the diversity of Queensland will be run in key markets.

Working with agents

As a key influencer in the decision of students to study in Queensland we will take a systematic approach to engaging with agents to promote Queensland. An agent toolkit will be included as part of the Study Queensland brand refresh. In April 2019 we will deliver the Agent Pitch Challenge to bring together the best ideas to promote Queensland globally.

Market intelligence and Professional Development

Study Queensland will continue to invest in bringing relevant and timely information to the sector. This will include a focus on hangouts and webinars, regional roadshows and targeted market intelligence. The 2019 IET Summit and associated masterclasses will be held in Brisbane.

Showcasing Queensland

A series of initiatives will ensure the best of Queensland as a study destination is showcased to the world – including through focused inbound visits and digital influencer campaigns.

Showcasing Queensland

2018-19 will see the rollout of the renewed Study Queensland Positioning Framework to better position Queensland as a global destination for education, training and research. The Study Queensland website and digital channels will be overhauled, along with a focus on regional integration for the 10 Queensland study clusters. To support the regional roll out of the Study Queensland Positioning Framework, Queensland's 10 study clusters and their members can bid for up to \$250,000 that will be allocated within the Round 1 2018-2019 of the IET Partnership Fund (due to open August 2018).

Digital Influencer Campaigns

Following the success of the inaugural Digital Influencer campaign during the 2018 Gold Coast Commonwealth Games, Study Queensland is on the look out for influencers from around the globe to take part in our influencer program. Study clusters and institutions can also partner with Study Queensland to bring the best ambassadors to Queensland.

Global Scholars Action Plan

The Global Scholars Action Plan aims to grow the number of sponsored students studying in Queensland. It aims to achieve this by promoting the state's offerings to scholarship bodies, building stronger relationships and raising Queensland's profile as a high-quality destination for education and training.

Scholarship Body Famil June 2019

Study Queensland in partnership with universities and key regions, will host the bi-annual inbound familiarisation tour for scholarship bodies from key partners around the globe. This will coincide with the 2019 IET Summit.

Working with agents

As a key influencer in the decision of students to study in Queensland, we will take a systematic approach to engaging with agents and promoting Queensland.

Study Queensland Agent Pitch

Participants will pitch ideas of how to promote studying in Queensland with a \$15,000 prize awarded to winners to implement the proposed initiatives.

School to Tertiary Pathways

Joint marketing to onshore agents, with participation from the schools sector and tertiary providers.

Agent toolkit and training

Study Queensland to develop an industry toolkit that helps providers and agents identify and assist in implementing best practice. This will be complemented by webinars and workshops conducted in partnership with Austrade and Education Agent Training Course (EATC).

Targeted inbound familiarisation

Inbound familiarisation tours for targeted groups of agents in select markets.

Market intelligence and Professional Development

Study Queensland will support industry to develop market intelligence, undertake research and promote existing research activities.

IET Market Intelligence Publications

IETU will release regular data publications through the Annual Market Reports and Monthly Sector Reports which will outline enrolment trends, Queensland's performance and areas of growth.

IET Research Agenda

IETU will continue to support research projects that align with its Research Agenda. This includes:

Gaining a better understanding of the economic value of IET on Queensland's economy

Increasing awareness of the factors that influence student decision-making preferences

Understanding market trends and impact of system changes on the IET industry

Assessing post-study outcomes and preferences after study

Understanding behaviours and trends of those studying in Australia on non-student visas

IET Hangouts

Quarterly professional development catch-up that assists providers understand and interpret available data and new research to make more informed business decisions.

Valuing the study tours sector – research project

Support research aimed at quantifying the full economic contribution of the study tours sector and non student visa holders to Queensland, in order to better understand and communicate the value that is not currently reported.

Study Gold Coast retention pilot – research project (Partnership Fund initiative)

Share outcomes from Partnership Fund project led by Study Gold Coast to understand the current retention rate for the local region and the key drivers for student decision making on where to study. This pilot will inform further work on research at the state level, with findings from the pilot to be shared across the sector.

Global market updates

Publish market updates throughout the course of the year to outline in-market developments. Our BDM network will provide key information for providers based on their market expertise and in-market experiences.

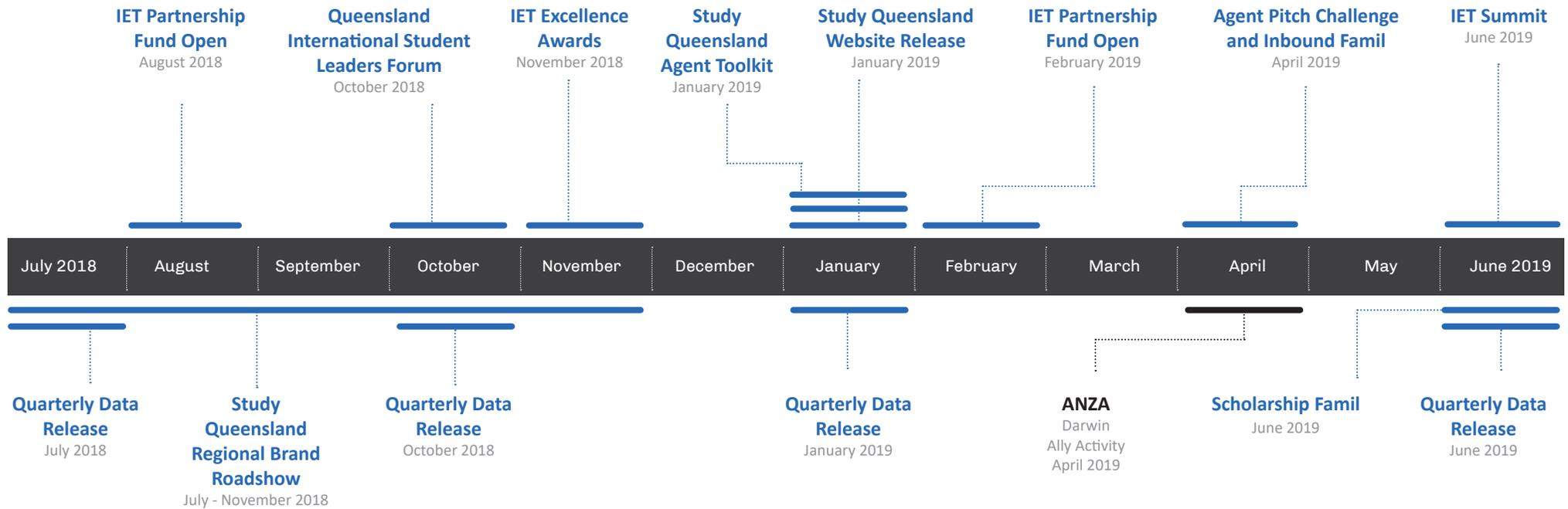
Regional Fact-Sheets

Study Queensland provides an annual update of the regional economic contribution analysis for Queensland's 11 education regions. The fact-sheets are available from July each year detailing international enrolments, growth and value of IET.

CROSS MARKET INITIATIVES

A series of initiatives will ensure the best of Queensland as a study destination is showcased to the world – including through focused inbound visits, digital influencer campaigns

ACTIVITIES FOR 2018-19



— Ally Led initiatives

For more information contact us at studyqueensland@tiq.qld.gov.au

There are a number of ways to get involved with the Global Partnership Plan

Visit



Visit the [website](#) to learn more about the initiative and supporting activities.

Connect



Connect with [Study Queensland](#)

Feedback



Share your [feedback and ideas](#) on existing and new activities.

Join



Join a [study cluster](#) in your local region.

Create



Build a [consortium](#) and apply for the next round of the IET Partnership Fund.

Learn



Attend the [2019 IET Summit in Brisbane](#)

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Queensland
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