



## Growth and diversification in traditional and emerging markets

In the first half of 2019, international student commencements (new student enrolments) grew by nine per cent, with nearly half of all commencements coming from China, India and Nepal. Commencements from India and Nepal continued to grow strongly (47 and 25 per cent respectively), compensating for a one per cent fall in commencements from China.

The Australian Government and the Council for International Education have a focus on supporting the diversification of Australia’s international education offerings, in terms of source countries, levels, courses and modes of delivery. Diversifying Australia’s offerings will help support the long-term sustainability of the sector.

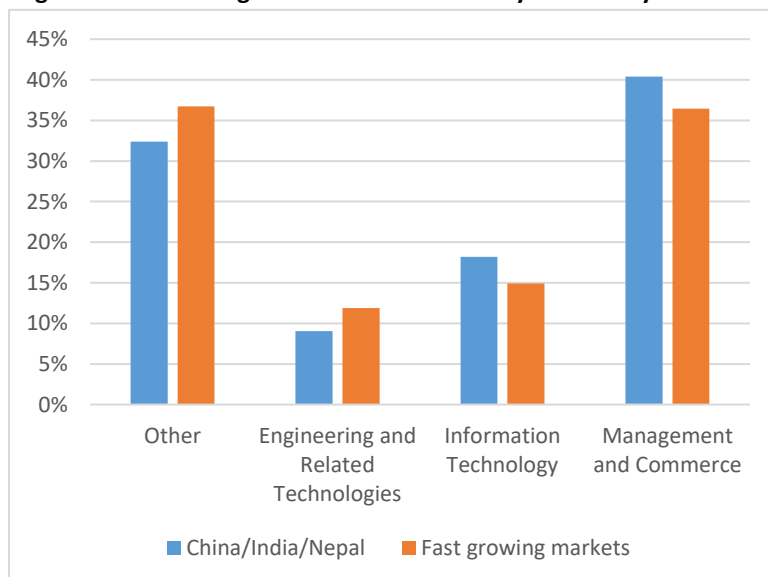
Australian international education providers are seeing strong growth in commencements from a number of traditional and emerging markets, helping to support diversification and strengthen markets other than China, India and Nepal.

Among the 25 largest source countries in the first half of 2019, nine countries (in addition to Nepal and India) showed double-digit plus growth. These countries included traditional education partners such as Vietnam and Indonesia, as well as emerging markets like Sri Lanka and Mongolia. Table 1 shows the growth in commencements from these traditional and emerging countries. These nine markets combined grew 29 per cent, which offset declining commencements from China and some of Australia’s other traditional markets like South Korea, Malaysia and Thailand. In total, commencements from the twenty-two largest markets after China, India and Nepal grew by a combined six per cent in 2019, representing a sustainable level of growth on already record highs.

**Table 1. Year to June commencements for fast growing markets**

	2018	2019	Growth
Colombia	9,261	11,223	21%
Vietnam	8,099	9,057	12%
Philippines	2,966	6,546	121%
Indonesia	5,119	5,836	14%
Pakistan	4,039	4,845	20%
Sri Lanka	3,201	4,198	31%
Saudi Arabia	1,500	2,594	73%
Chile	1,993	2,335	17%
Mongolia	1,371	1,915	40%
<b>Total</b>	<b>37,549</b>	<b>48,549</b>	<b>29%</b>

**Figure 1. Fields of higher education courses by nationality**



Students from the nine countries shown in Table 1 typically study a wider mix of courses and levels to students from the top three markets (China, India and Nepal), helping to diversify Australia’s education offerings.

Higher education students from the nine countries were significantly more likely to be studying doctoral and masters research degrees (five per cent) than students from China, India and Nepal (two per cent), and less likely to be studying masters coursework degrees (33 versus 52 per cent). These students were also more likely to be studying engineering and other courses, and less likely to be studying management and information technology courses (Figure 1).