

STUDY GOLD COAST PHILIPPINES TRADE MISSION

OVERVIEW: INTERNATIONAL EDUCATION MARKET AT A GLANCE

The Philippines is the 6th largest economy in ASEAN and is the 39th largest in the world. With the second largest population in ASEAN and one of the youngest (110 million with a median age of 25), the Philippines continues to focus on employability and upskilling the workforce at par with local and global demand. The strong economic growth is leading to a rising middle class. The international student market is recovering quickly with an expected annual growth of 10-13% in the next 5 years.

The Philippines is one of the top source markets for Australian education with significant and uninterrupted growth before the pandemic. At the end of 2022, record-breaking numbers of Filipino students were studying in Australia. Whilst largely a VET market, there has been an increasing interest to study Higher Education in Australia. Commencements in higher education increased 31% compared to 2019 and is at its highest ever. With a growing middle class, students and parents are seeking to access internationally recognised qualifications that will ensure a pathway towards employment.

On the Gold Coast, it has ascended as the 4th key market for international students, with a strong growth in the Vocational Education and Training (VET) sector. Between December 2022 and October 2023, the overall student population on the Gold Coast saw a remarkable 87% increase. Impressively, Filipino students pursuing VET courses experienced an even more substantial surge, with a notable 102% rise during the same period.

Australia is an attractive overseas study destination for Filipinos because of geographic proximity (less than an 8-hour flight to major airports), time difference (2 hours behind from Sydney; and Perth is on the same time zone), family ties (Filipinos are the fifth largest ethnic group in Australia) and personal safety. Competition from Canada, the United Kingdom, Europe and the United States remain strong with increasing virtual student recruitment exhibitions, information sessions, partnerships with government and academia and an expanding social media presence.

Key market indicator	Statistic	Source
Competitive position	Australia was the top destination for outbound tertiary internationally mobile students in 2020 with 10,082 students (38.5%), followed by the US and Canada	UNESCO
Market share	5.1% of student commencements came from the Philippines in YTD May 2023	Department of Education
Visa grant rates	The Philippines had a 76.8% visa grant rate for offshore primary applicants in FY2023, down 1.4 percentage points compared to FY2022	Department of Home Affairs

Reference: Austrade International Education

OPPORTUNITIES AND INTEREST IN MARKET:

1. **Higher Education:** Since the pandemic, commencements in higher education in Australia more than doubled. Parents prefer their children to study in Australia because of its proximity to the Philippines, minimal time difference, and safety. In addition, employability and cost remain a priority for student decision-making.
2. **VET:** The majority of students from the Philippines study VET and the Philippines is one of the top source markets for VET in Australia. Opportunities exist for the in-market delivery of VET programs as global demand for Philippine workers with relevant technical training remains high. Gold Coast VET providers can capitalise on this opportunity by partnering with local industry, corporate and/or government organisations to create a pool of highly skilled and relevant workers before they depart the Philippines. Qualifications in health and hospitality are popular – which are top course offerings by institutions on the Gold Coast.
3. **Post Study Work Rights (PSWR) Advantage:** The availability of the Temporary Graduate Visa (post-study) and Australian Government scholarships enhances Australia's appeal as a compelling study destination for postgraduate Filipino students. The Gold Coast, as a major regional centre, offers an extended year under PSWR, providing students with valuable time to apply their acquired knowledge, augment their skills, and boost their employability.
4. **English Language:** As English serves as the predominant medium of instruction in the Philippines, it is widely spoken across the country. Consequently, concerns regarding IELTS requirements are less prominent when compared to markets where English is not the primary language of communication.

TRADE MISSION OBJECTIVES

1. **Establish Higher Education Partnerships:** Initiate collaborations with key Philippine educational institutions to promote academic exchanges and joint research initiatives.
2. **Promote Gold Coast as a Premier Study Destination:** Evaluate marketing strategies to enhance efforts to elevate awareness of Gold Coast education in the Philippines. Emphasise the city's unique offerings, student-friendly environment, and affordability as an attractive alternative to Sydney and Melbourne for prospective international students.
3. **Assess VET Opportunities:** Explore and analyse Vocational Education and Training (VET) prospects for Gold Coast institutions, adeptly navigating the challenges posed by an increased visa refusal rate. Evaluate the potential for strategic partnerships in this sector to enhance collaboration and opportunities for growth.
4. **Engage with Students and Education Agents:** Collaborate with education agents, school counsellors, and students to not only promote the Gold Coast as a premier study destination but also to strengthen our reputation for unparalleled student support, career guidance, and excellent employability prospects.

PROPOSED ITINERARY:

**Draft only and will continue to be refined during planning*

Itinerary (in partnership with Austrade in Manila):

CITY	Schedule
Manila	<p><i>Monday, 15 April 2024 (morning)</i></p> <p>Austrade Manila Market Briefing to Study Gold Coast delegates</p> <p>Provide an overview of the education sector in the Philippines including general updates on international education enrolments, market challenges and opportunities, and demands for partnerships.</p> <p>Austrade to invite Australia Awards and the Department of Home Affairs to provide a briefing (TBC)</p>
Manila	<p><i>Monday, 15 April 2024 (afternoon)</i></p> <p>Education Agent Briefing and Networking Event</p> <p>Austrade to invite 20 education agencies (two counsellors per agency) to attend the event.</p>
Manila	<p><i>Tuesday, 16 April 2024</i></p> <p>Lunch with International School Counsellors</p> <p>Austrade to invite at least 10 international and K12 high schools to attend the event.</p>
Manila	<p><i>Tuesday, 16 April 2024</i></p> <p>Dinner with alumni</p> <p>Austrade to invite alumni through PA3i and Australia Global Alumni. GC universities to promote the event as well.</p>
Manila	<p><i>Wednesday, 17 April 2024</i></p> <p>Meeting with the Philippine Department of Science and Technology (DOST) / CHED / TESDA</p>

	<p>Austrade to arrange a meeting with DOST and CHED (separately), advise on the agenda and accompany the delegation to the meetings.</p> <p>Final agenda to be discussed with Study Gold Coast.</p>
Cebu	<p><i>Thursday, 18 April 2024</i></p> <p>Meeting and mini fair at a school in Cebu</p> <p>Austrade to scope for interest from high schools in Cebu to host a mini fair for Study Gold Coast delegates.</p>
Cebu	<p><i>Thursday, 18 April 2023</i></p> <p>Meeting with an international or K12 high school in Cebu</p> <p>Austrade to request a meeting with an international school in Cebu.</p>
Cebu	<p><i>Thursday, 18 April 2023</i></p> <p>Education Agent Briefing and Networking Event</p> <p>Austrade to invite education agents (two counsellors per agency) based in Cebu to attend the event.</p>