

# Indonesia



## OVERVIEW

Indonesia, our 9<sup>th</sup> largest source market, accounted for **2.4%** of international students in 2019. It is the eighth largest higher education market.

## FAST FACTS



Globally the **22<sup>nd</sup> largest** education market (UNESCO, 2018)



**18,091** students in Australia (2019)



Commencements grew by **9.6%** (2019)



**\$55,774** average spend on education related personal travel (2019)



**44%** employment to population ratio (2016 Census)

## EDUCATION PROVIDERS



In 2019, the top 5 HE providers accounted for **44%** of their HE enrolment.

The top 5 VET providers accounted for **22%** of their VET enrolments.

## OUTBOUND TRENDS

Indonesia, with 49,900 tertiary students abroad, makes up **0.9%** of all mobile students.



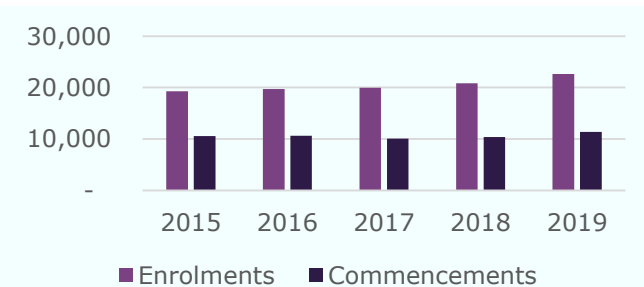
The top three destinations for its students are: **Australia (24.4%)**, the United States (17.1%) and Malaysia (16.9%).

## OFFSHORE TRENDS

In 2018, there were 1,575 Indonesian higher education enrolments in Australian programs overseas.

## GROWTH TRENDS

In 2019, Indonesian enrolments grew by 8.7%, and commencements grew by 9.6%.



In YTD September 2020, enrolments decreased by 0.9% and commencements fell by 14.5% compared to the same time last year.

## STATE BREAKDOWN

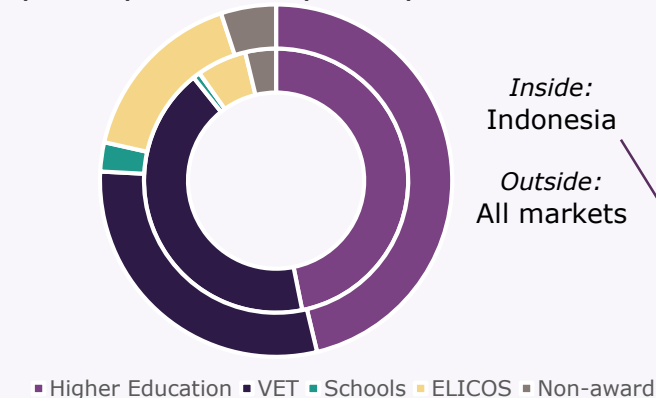
Indonesia is the seventh largest market for NSW.

	Indonesia	Share of total	Total
NSW	11,916	3.3%	364,857
VIC	7,391	2.4%	307,681
QLD	1,180	0.8%	144,422
SA	335	0.8%	44,244
WA	1,199	2.2%	53,304
TAS	167	1.1%	15,538
NT	152	4.2%	3,637
ACT	315	1.7%	18,800
<b>Total</b>	<b>22,655</b>	<b>2.4%</b>	<b>952,483</b>

Indonesian representation was highest in Darwin (5%), Sydney (3%) and Mornington Peninsula (3%).

## SECTOR BREAKDOWN

Indonesia is primarily a higher education (46.8%) and a VET (42.4%) market.



A majority of Indonesian higher education enrolments are at the undergraduate level (71.4%).

## EXPORT VALUE (\$M)

In 2019, the education export earnings from Indonesia were **\$1 billion**, with an average spend of **\$55,774** per student.

	2016	2017	2018	2019
Indonesia	\$764	\$833	\$899	\$1,009
Share of total	3.0%	2.8%	2.6%	2.5%
<b>Total</b>	<b>\$25,792</b>	<b>\$30,263</b>	<b>\$35,234</b>	<b>\$40,336</b>

## STUDENT VISA HOLDERS (2020)

Indonesia accounts for 2.6% of the primary student visa holder as at 8 November.

	Inside Australia	Outside Australia
Indonesia	10,859	2,973
Share of total student visas	2.7%	2.1%
<b>Total</b>	<b>399,802</b>	<b>139,842</b>

The proportion of Indonesian primary student visa holders offshore has increased in the last seven months from 10.0% (April 5) to 21.5% (8 November). In this period the total number of Indonesian primary student visa holders decreased by 1,516.

## TOP FIELDS OF STUDY

Based on share of total Indonesian enrolments (2019)

1. Management & Commerce (49.6%)
2. Society & Culture (13.3%)
3. Food, Hospitality & Personal Services (7.3%)