

Australia



REGION: CANZAUS

Also included in this region: Canada, New Zealand, United States

PART I: ENROLMENTS AND INSTITUTIONS

Australia’s higher education (HE) system loosely follows the North American model. The overwhelming majority of students attended comprehensive universities in 2018. Total enrolments grew faster from 2006 to 2018 in Australia than across the rest of the CANZAUS region and the Global North, boosted by the arrival of hundreds of thousands of international students. This growth occurred more through the expansion of existing institutions than through an increase in the number of institutions. Eighty-seven percent of students attended public providers in 2018, which was above the average across the rest of the CANZAUS region.

TABLE 1 – Types of higher education providers

| CATEGORY | INSTITUTIONS | INSTITUTIONS COUNT IN 2018 | | |
|-----------------------------------|---|----------------------------|-------|-------|
| | | PUB. | PRIV. | TOTAL |
| Comprehensive universities | Universities | 38 | 4 | 42 |
| University Colleges | Foreign institutions | 0 | 1 | 1 |
| Hybrids | Private non-universities delivering HE programs | 0 | 78 | 78 |
| Secondary Schools | All technical and further education (TAFE) institutions; Other non-university vocational education institutions | NA | NA | NA |

FIGURE 1 – Numbers of institutions by type, 2006-2018

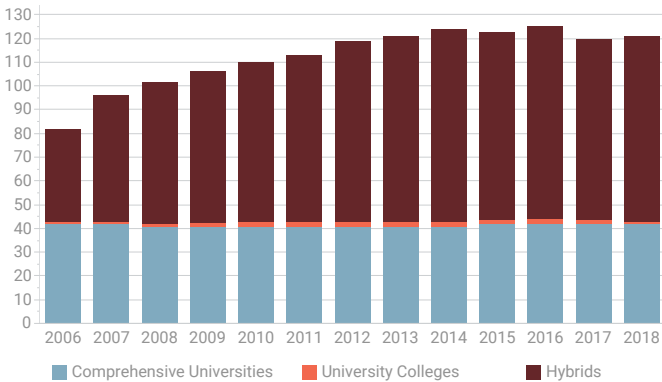


FIGURE 2 – Total enrolments with public and private higher education providers, 2006-2018 (Millions)

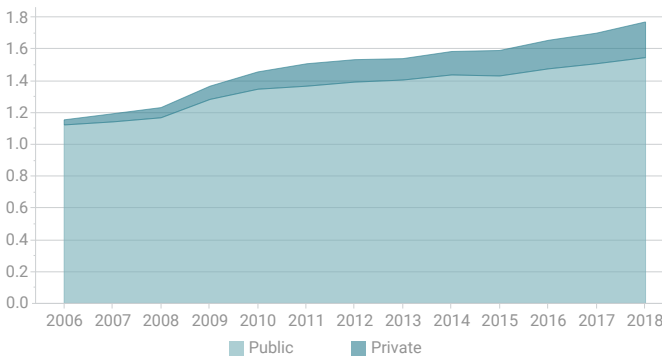


FIGURE 3 – Changes in enrolment, in Australia, the rest of CANZAUS and the rest of the Global North, 2006-2018

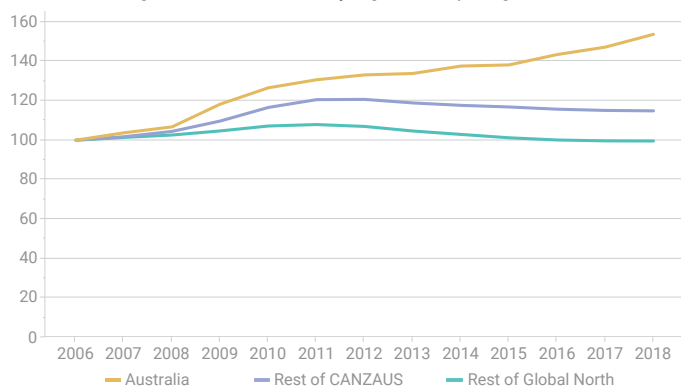


FIGURE 4 – Share of enrolments by institution type in Australia and the rest of CANZAUS, 2006 and 2018 (2006=100)

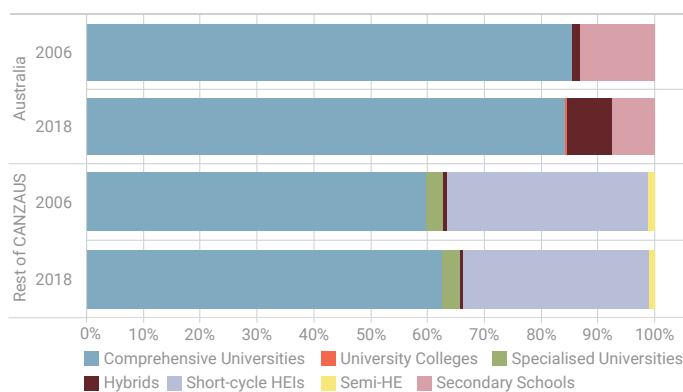


FIGURE 5 – Share of enrolments in public and private institutions, by institution type, in Australia and the rest of CANZAUS, 2018

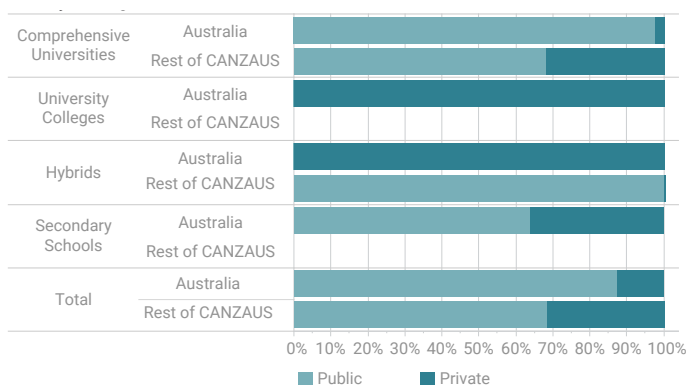
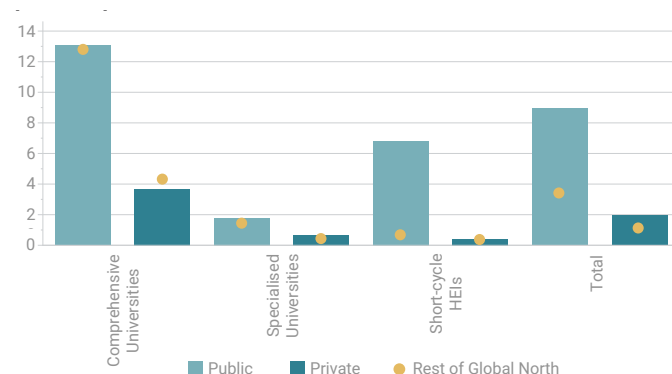


FIGURE 6 – Average institution-size by institution type in Australia and the rest of the Global North, 2018 (Thousands)



PART II: HIGHER EDUCATION FINANCING

Public HE spending rose by a little over 20% from 2006 to 2018, roughly in line with the rest of the CANZAUS region and the Global North. As a percentage of GDP, however, spending fell slightly, again in line with wider comparator averages. Total expenditures of public HEIs grew more quickly, thanks to large infusions of income from international students. Private universities, financed almost entirely through tuition fees, spent about 20% less per student than public universities in 2018.

FIGURE 7 – Change in real total public spending on higher education in Australia, the rest of CANZAUS and the rest of the Global North, 2006-2018 (2006=100)

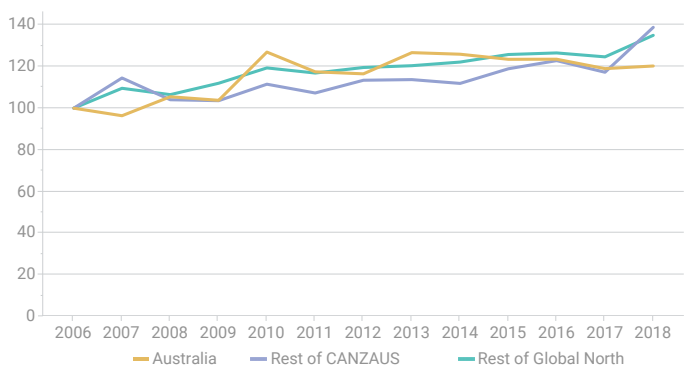


FIGURE 8 – Total public spending on higher education relative to GDP in Australia, the rest of CANZAUS and the rest of the Global North, 2006-2018

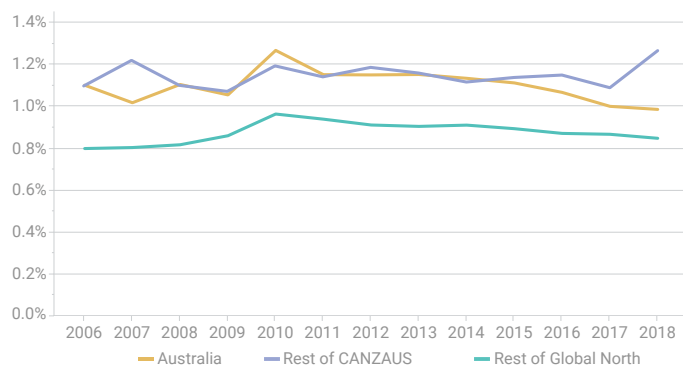


FIGURE 9 – Change in real total institutional spending of public institutions by institution-type in Australia and the rest of the Global North, 2006-2018 (2006=100)

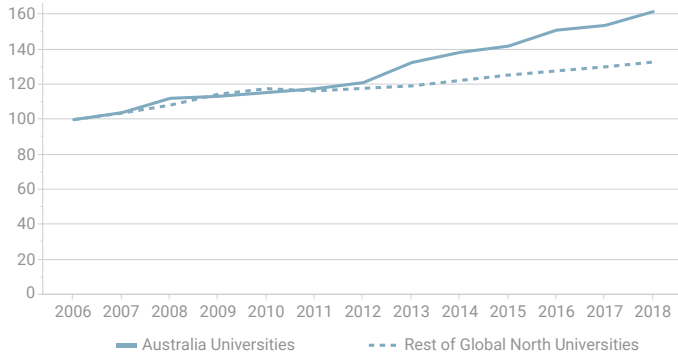


FIGURE 10 – Per-student total institutional spending of public institutions by institution-type in real PPP, in Australia and the rest of the Global North, 2006-2018

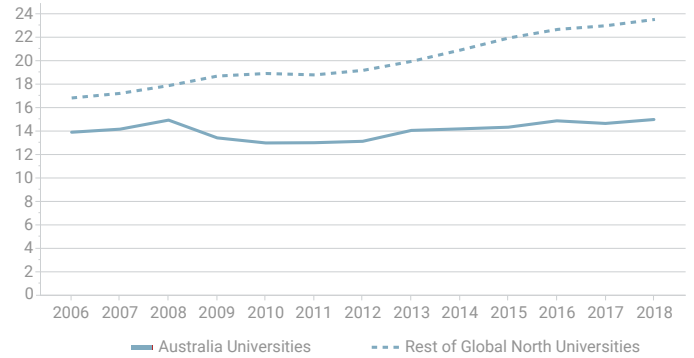


FIGURE 11 – Government transfers relative to total institutional spending of public institutions by institution-type in Australia and the rest of the Global North, 2006 and 2018

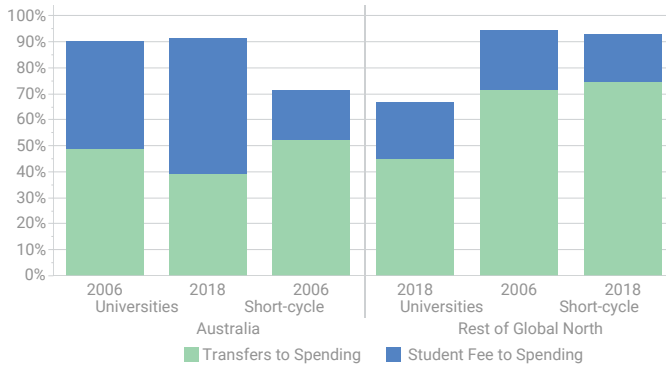


FIGURE 12 – Change in real total institutional spending of private institutions by institution-type in Australia and the rest of the Global North, 2006-2018 (2006=100)

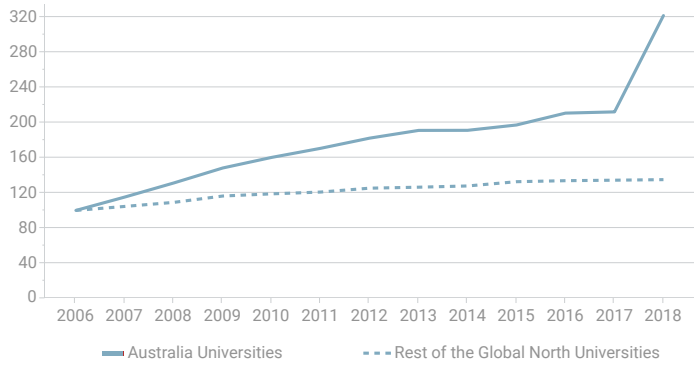


FIGURE 13 – Per-student total institutional spending of private institutions by institution-type in Australia and the rest of the Global North, 2006-2018

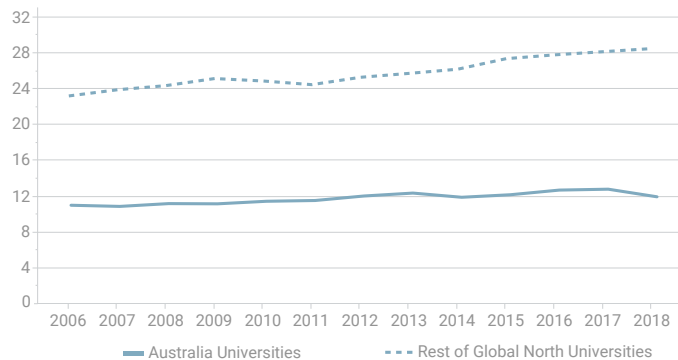
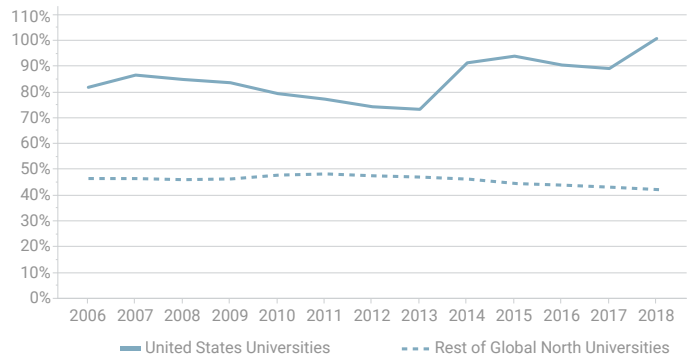


FIGURE 14 – Student fee revenues relative to total institutional spending of private institutions by institution-type in Australia and the rest of the Global North, 2006-2018



PART III: STUDENT FEES

All students pay fees in Australia under a differential regime with much higher fees for international students (except New Zealanders). Fee revenues per domestic student were less than half as high at public universities as at private universities in 2018. From 2006 to 2018, domestic student fees rose only modestly at public universities, while fees rose more quickly at private universities, particularly since 2013. Fee revenues at public universities were almost three-times higher per international student than per domestic student in 2018, up markedly from 2006 when they were less than two times higher.

FIGURE 15 – Share of students at public institutions under each type of tuition regime in Australia, the rest of CANZAUS and the rest of the Global North, 2006 and 2018

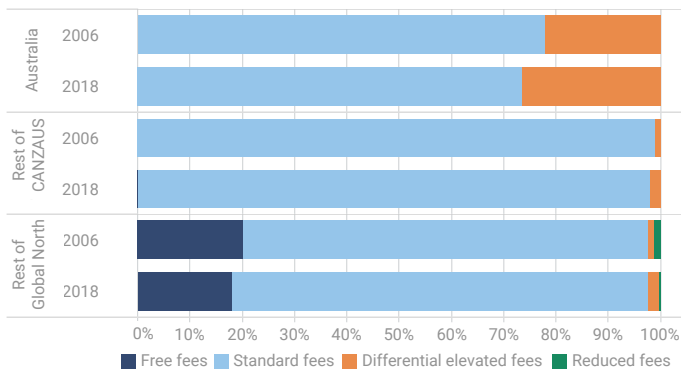


FIGURE 16 – Fee revenues per student paying “regular” rates at public institutions by institution type in PPP, 2006-2018

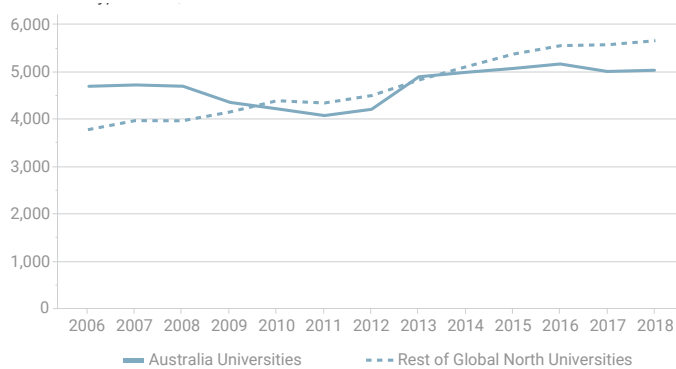


FIGURE 17 – Fee revenues per student paying elevated differential fees at public institutions by institution type in PPP, 2006-2018

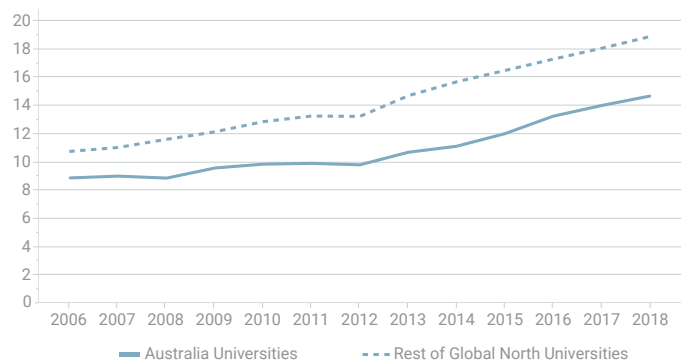
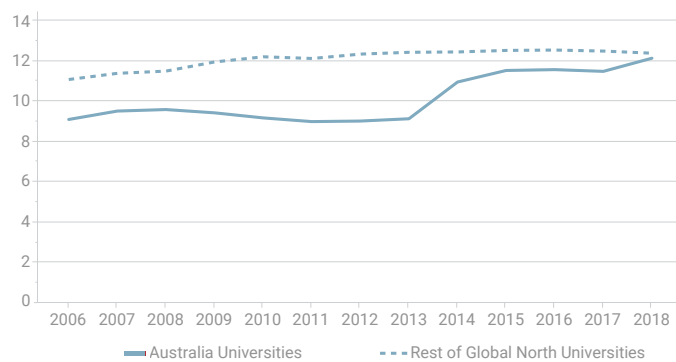


FIGURE 18 – Fee revenues per student at private institutions by institution type in PPP, 2006-2018



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PART IV: STUDENT FINANCIAL AID

Student assistance in Australia is particularly complicated with multiple loan and grant programs available for students depending on their age, ethnicity, and type of HE provider. Overall, loans predominated over grants by roughly a 3:1 ratio in 2018. The share of students receiving grant-based aid declined steadily after 2009, and average grant size fell after 2013. The number of students spiked sharply in the mid-teens when the main Higher Education Loan Program (HELP) was extended to vocational education students for the first time. When it became apparent that low repayment rates for these new recipients would make the system very expensive, the government reduced eligibility criteria once again and recipient numbers fell back. At the peak of the loan boom in 2015, students aid disbursements rose to just over 0.7% of GDP, but by 2018 they had fallen back towards the long-term average of around 0.45% of GDP.

TABLE 2 – Student financial aid regime, including recipients and amounts disbursed in 2018

| CATEGORY | PROGRAMS | BASIS OF ALLOCATION | RECIPIENTS | AMOUNTS DISBURSED (USD) |
|---------------|--|---|------------|-------------------------|
| Grants | Youth Allowance (higher education students); AUSTudy; ABStudy; Commonwealth Scholarships | Need-based, with some reserved for Indigenous Australians | 211,605 | 1,389,204,668 |
| Loans | HECS-HELP, FEE-HELP, OS-HELP, VET FEE-HELP and other vocational education and training loans | Automatic eligibility, with some limits in VET | 688,700 | 4,526,718,152 |

FIGURE 19 – Total disbursements to students in financial aid relative to Gross Domestic Product, in Australia, the rest of CANZAUS and the rest of the Global North, 2006-2018

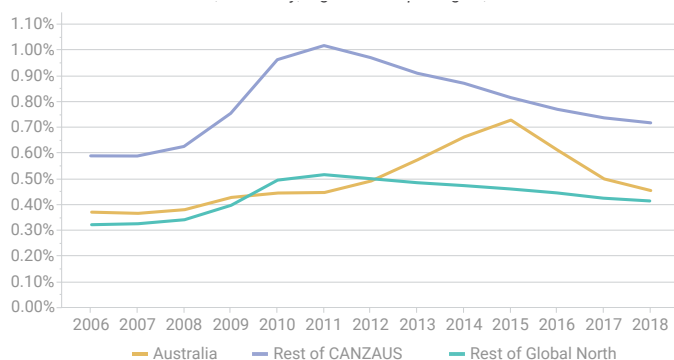


FIGURE 20 – Change in amounts disbursed to students by form of financial aid in Australia and other Global North countries that offer financial aid of this type, 2006-2018 (2006=100)

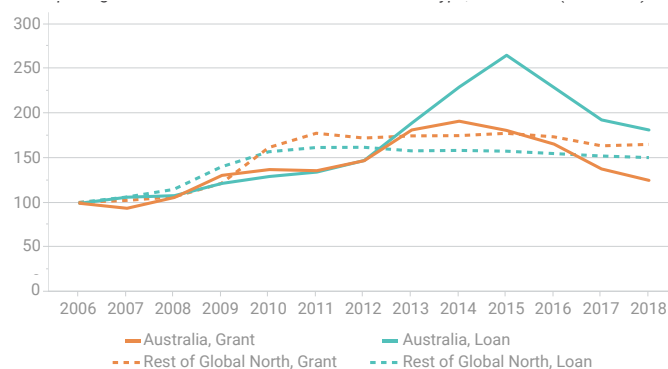


FIGURE 21 – Share of higher education students receiving student financial aid by type in Australia and other Global North countries that offer financial aid of this type, 2006-2018

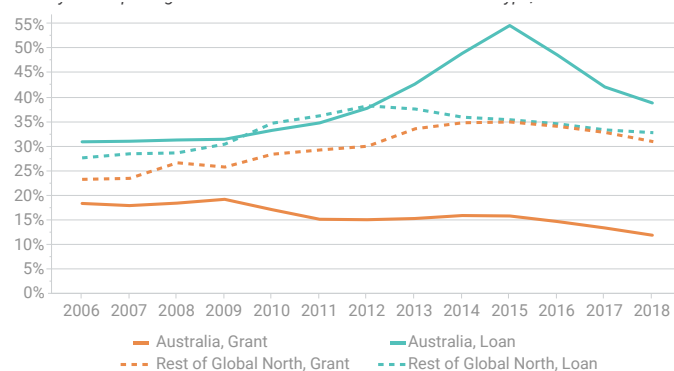
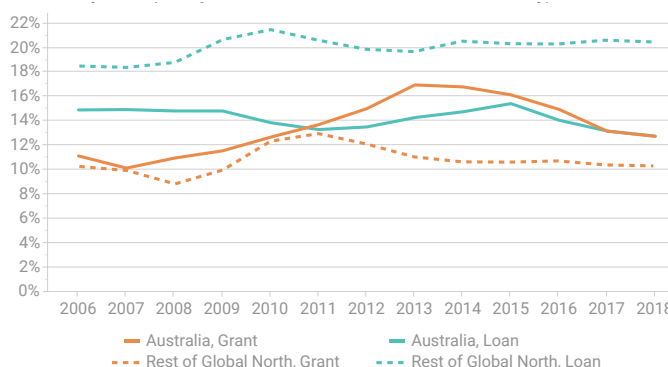


FIGURE 22 – Financial aid per recipient relative to GDP per capita by form of financial aid in Australia and other Global North countries that offer financial aid of this type, 2006-2018



***Note:** For more on methodology and data quality please see [Appendices A and B](#).