



2027 Australian Schools International Event Program



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About AEAS Events

For more than 40 years, AEAS has supported Australian schools in connecting with quality education agents and international families across key source markets.

Our in-country events offer invaluable opportunities to share your school's story, build meaningful relationships, and inspire confidence in families considering an Australian education.

Building trust through direct engagement

Successful international student programs are built on strong relationships, grounded in trust and consistency. Regularly visiting markets in person allows schools to deepen existing connections and foster new ones with education agents, alumni, current and past parents. AEAS events help your school stand out in an increasingly competitive global landscape, while also contributing to the strength and visibility of the Australian school sector as a whole.

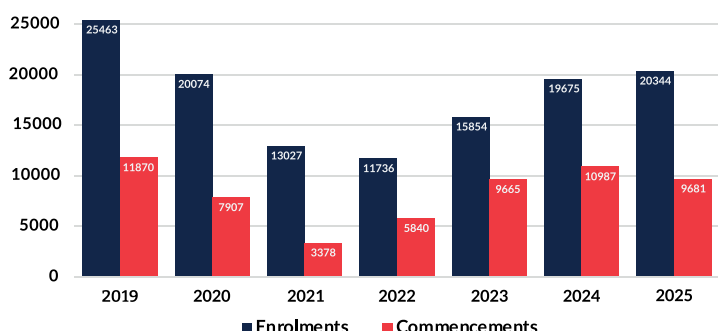
Navigating a changing landscape

Two forces are reshaping demand across our key source markets. First, global economic uncertainty including geopolitical instability, US tariff concerns, and currency pressures has made families more cautious about the timing and cost of overseas education. Second, Australian government policy around international student numbers and visa settings, while aimed at the tertiary sector, has caused collateral reputational damage that has flowed into the school sector. Confidence has softened in several markets, most acutely in Vietnam. The school sector also faces growing competition from regional international schools in Singapore, Malaysia, Thailand, Hong Kong, and Japan, which offer English-language education at lower cost and closer to home.

Against this, Australia's competitors face their own pressures. The UK's 20% VAT on private school fees and tightening US visa policies are redirecting families toward Australia as a high-quality, stable, and comparatively affordable alternative.

For Australian schools, the strategic response is clear: maintain a consistent, visible presence in key markets; communicate your value proposition with clarity and confidence; and demonstrate long-term commitment to the families and agents you work with. Schools that stay the course, even when volume is down, are building the trust and brand recognition that drives sustainable recruitment over time. The families attending AEAS events in 2025 and 2026 were high quality and well informed with a high likelihood of proceeding to application. Quality of engagement is increasingly the measure that matters.

YTD December 2025 data shows total Australian school sector enrolments of 20,344, up 3.7% on 2024, with government school enrolments rising 2.8% to 14,203 and non-government schools up 5.7% to 6,141. Total commencements fell 11.5% to 9,681, highlighting that while the enrolled base is growing, the flow of new starters is contracting. China (7,263), Vietnam (3,931), Hong Kong (1,241), South Korea (1,135), and Japan (805) remain the top five source markets for enrolments.



Who should attend AEAS Events?

- CRICOS registered Australian schools
- ELICOS High School Preparation program providers
- Ancillary service providers (student advocates, homestay organisations, health providers), subject to AEAS approval

Why join AEAS Events?

Schools participating in AEAS events benefit from our extensive event-planning experience, receiving comprehensive support before, during, and after each event. Participants gain:

- Economies of scale not possible for individual school efforts
- Targeted marketing exposure in high-potential regions through in-language promotion
- Increased brand visibility through consolidated sector promotion

AEAS events connect schools directly with highly motivated families, offering more meaningful, cost-effective engagement than broader, multi-sector events. As international parents begin planning their children's education earlier, schools must establish multiple touchpoints to build credibility and trust over time.

Australian Schools Exhibitions



- Position Australian school education as a first-class, globally desirable option.
- Promote Australia as a safe, high-quality destination that leads to success at school, university, and beyond.
- Provide direct access to prospective students and families, allowing schools to highlight key selling points and build personal connections.
- Support brand visibility in established markets and help schools expand into smaller and emerging markets.
- Include tailored market briefings focusing on the school sector.

Education Agent Workshops



- Facilitate high-quality, targeted conversations in a time and cost-effective format.
- Help schools meet National Code of Practice requirements for agent engagement and communication.
- Enhance agent knowledge about participating schools, entry pathways and place availability.
- Strengthen partnerships, with opportunities to explore and formalise agency agreements.
- Held at five-star venues, fully catered.

Inclusions

Your participation fee includes:

- Access to the AEAS Event Management System (EMS) for student registration and data collection
- Venue arrangements including booth or table setup, seating, power, Wi-Fi, and water
- Pre-departure, onsite, and post-event support from the AEAS team
- Market briefings tailored to school representatives (where applicable)
- End-to-end event management and support
- Full catering during education agent workshops
- Event marketing and promotional support
- Business visa support (where applicable)

Booth sharing

Booth sharing is available at select Australian Schools Exhibitions. Schools may share a booth with one other school (maximum two schools per booth). The total cost is \$7,430, or \$3,715 per school.

Booth sharing is not permitted at Education Agent Workshops.



PLACES ARE LIMITED!

Register early at
aeas.com.au/school-events

Australian Schools Information System (ASIS)

Over
90,000
visitors in the past
12 months!

4.5/5 Star
User Rating

What is the Australian Schools Information System?

One of the main challenges for international families and education agents is finding and sorting through the information they need to make confident decisions about Australian schools. Key details such as enrolment processes, place availability, and application requirements are often hard to locate, buried deep within websites, or presented in ways that aren't accessible to non-native English speakers.

To address this, AEAS developed the Australian Schools Information System (ASIS): a purpose-built, centralised platform that helps families and agents search, compare, and connect with quality Australian schools more easily and effectively.

In the past 12 months, over 90,000 users visited ASIS, generating more than 25,000 school profile views—with the top-listed school receiving almost 1800 views. 85% of users said ASIS helped them select a school, and the platform earned an average usability rating of 4.5 out of 5 stars.



Benefits for Parents and Agents

ASIS makes the school selection process easier by:

- Presenting information in a consistent, user-friendly format, specific to international students.
- Offering advanced filters to narrow search results.
- Displaying current place availability for the next three years.
- Making comparisons between schools simple and accessible.
- Supporting content in multiple languages, helping families and agents navigate and understand the information more easily.

Benefits for Australian Schools

ASIS helps schools:

- Showcase their offering on a platform purpose-built for international audiences.
- Benefit from ongoing, highly targeted digital marketing to international families and education agents.
- Save time by referring agents directly to listings in relevant languages, reducing the need for full website translation.
- Lower printing and production costs by using ASIS as a centralised information hub.
- Access the Education Agent database and communication tools (Premium Listings only).

australianschools.aeas.com.au



Premium Listing



Schools with a Premium Listing have a home page and 14 information pages including Place Availability, Application Forms and a Visual Gallery (photos and videos). Schools are included in selection filters and have access to the Education Agent database in the back end of the ASIS system. Students, agents and schools may apply and communicate directly and securely through the system if they wish.

User analytics clearly show that schools with a Premium Listing have, on average, 3-4 times higher traffic to their profile than those with Summary Listings.

For what effectively amounts to \$200 per month, your school can be in front of thousands of families and agents, and benefit from AEAS' highly-targeted, in-language digital marketing campaigns.

Annual Cost

- \$2400 + GST (from date of going live)
- \$1250 + GST establishment, set up and support one off cost

Summary Listing



The Summary Listing option offers schools a single page, 150-word school profile and up to two photos or one video on ASIS. School Profiles must be listed at minimum in English and Simplified Chinese. Schools participating in events must also include the language(s) of the market(s) to which they are travelling.

Schools can be searched via the filters, but do not have any access to the back end of the system, the Education Agent database, place availability functionality or parent communication channels.

Cost per calendar year

1 January to 31 December 2027

- \$1250 + GST for schools participating in an AEAS parent fair or agent workshop
- \$1500 + GST for schools not participating in AEAS events

For schools that join during the calendar year, the fee will not be prorated.

The listing is for 12 months.

The establishment fee will be waived for schools that sign up in conjunction with a registration for 2027 AEAS Events by 31 December 2026.

Schools listed on ASIS must actively refer students for AEAS Testing.

Schools wishing to subscribe to ASIS must have listings in English and simplified Chinese, and are strongly encouraged to include other languages for key markets (Vietnamese, Korean, Thai, Japanese, Indonesian).

AEAS can assist with translations for a fee.

Click to find out more about ASIS

**Sign up when registering for 2027 AEAS Events
or contact Jenni Tobin via email to jenni@aeas.com.au**



Location	Date	Venue	Cost	Event Type
Beijing, China	Saturday 6 March	JW Marriott Chaoyang Hotel	\$4,950	Exhibition
Shanghai, China	Sunday 7 March	Conrad Hotel	\$4,950	Exhibition
Shanghai, China	Monday 8 March	Conrad Hotel	\$2,700	Agent Workshop
Shenzhen, China	Saturday 13 March	JW Marriott Hotel	\$4,950	Exhibition
Hong Kong SAR	Sunday 14 March	Cordis Hotel	\$4,950	Exhibition
Hong Kong SAR	Tuesday 16 March	Cordis Hotel	\$2,700	Agent Workshop

Register online before 30 September 2026 at aeas.com.au/school-events

Mainland China

China remains the largest source market for international school students studying in Australia. YTD December 2025 total enrolments reached 7,263, up 16% on 2024, with government schools rising 19% to 4,442 and non-government schools up 12% to 2,821. Commencements were flat at 3,230, suggesting the enrolled base is growing but the flow of new starters has stabilised.

Visa lodgements are the clearest forward indicator of pipeline health. Q3 2025-26 data shows 1,704 lodgements for China, down 24% on the 2,252 lodged in the same period of 2024-25, signalling that the pipeline of prospective students is contracting. Over the full 2024-25 year, 3,116 visas were lodged, itself down 25% on the 4,128 of 2023-24. This sustained decline in lodgements reinforces the importance of schools maintaining active engagement now to ensure they are capturing available demand.

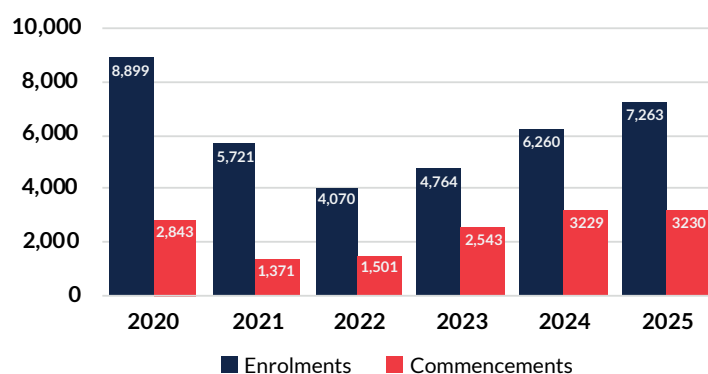


Figure 1.1 Mainland China Enrolments and Commencements - YTD DEC

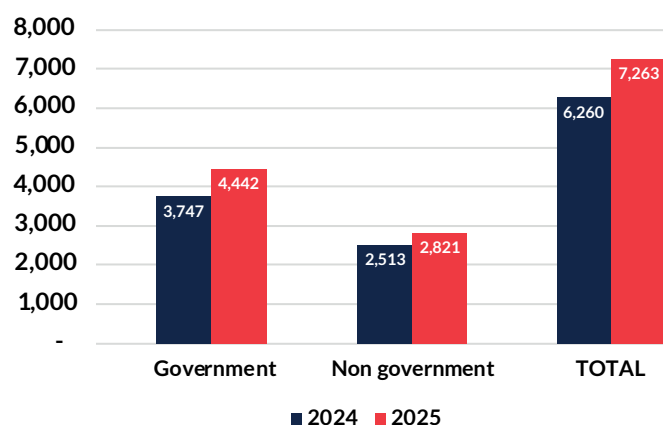


Figure 1.2 Mainland China Enrolments - YTD DEC

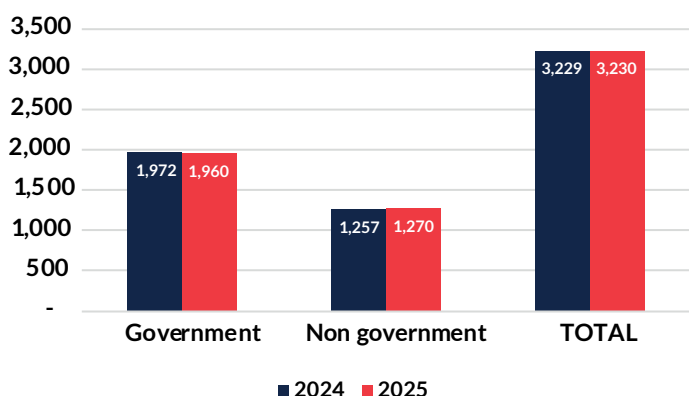


Figure 1.3 Mainland China Commencements - YTD DEC

Market observations

There has been continued softening of international school sector visa applications to Australia, reflecting a range of factors both within China and globally. The ongoing impact of China's 'Double Reduction' policy, together with investment in domestic and internationalised schooling options, is reshaping how families approach study pathways and reducing the urgency to pursue overseas education.

At the same time, Chinese families are increasingly scrutinising the return on investment of an international school education. Rising costs and uncertainty around long-term outcomes are leading families to more carefully evaluate whether studying abroad at school level represents the most effective pathway.

Despite these challenges, diminishing interest in the UK and US driven by cost, safety, and policy concerns continues to present an opportunity for Australia to reinforce its position as a safe, welcoming, reputable, and comparatively affordable alternative. Australian schools, with their emphasis on student wellbeing, holistic development, and strong university pathways, remain an attractive and reliable option for Chinese families looking to secure a successful future for their children.



Ongoing economic headwinds - including the downturn in China's property market, which has historically been a primary source of household wealth, are contributing to more cautious financial decision-making for some families.

Tier-one cities continue to offer the strongest recruitment potential. Shanghai, Beijing, and Guangzhou and Shenzhen consistently rank as the top four cities for Australian school sector visa lodgements. Other high-potential cities include Hangzhou, Nanjing, Chengdu, Xi'an, Wuhan, and Qingdao.



Why participate in China?



Regular brand visibility, consistent agent engagement, and direct family communication are essential to remain competitive in China. AEAS events are a proven platform and should be a core part of any school's China market strategy.

Beyond in-person events, participating schools benefit from year-round promotion via the AEAS China office including

- Livestreams and webinars for parents and agents.
- Social media engagement through Rednote, Douyin, and WeChat.
- Promotion via the official AEAS WeChat channels with over 130,000 engaged followers.

Hong Kong SAR

Hong Kong is the third-largest source market for Australian school sector students. For over 35 years, AEAS has organised highly successful school exhibitions in Hong Kong, having built strong brand recognition among parents which results in consistently high attendance.

The March 2026 Exhibition attracted 180 families, with schools giving the event a rating of 4.5/5. Schools reported that families were well-informed and engaged in productive conversations, with a significant proportion expected to progress to application.

YTD December 2025 data show 1,241 enrolments (down 2% on 2024), with non-government schools stable at 852 and government schools down slightly to 389. Commencements fell 15% to 523 (from 619 in 2024). Visa lodgements for Q3 2025-26 totalled 189, down 22% on the 242 lodged in the same period of 2024-25, indicating a contracting pipeline that schools need to actively work to sustain.

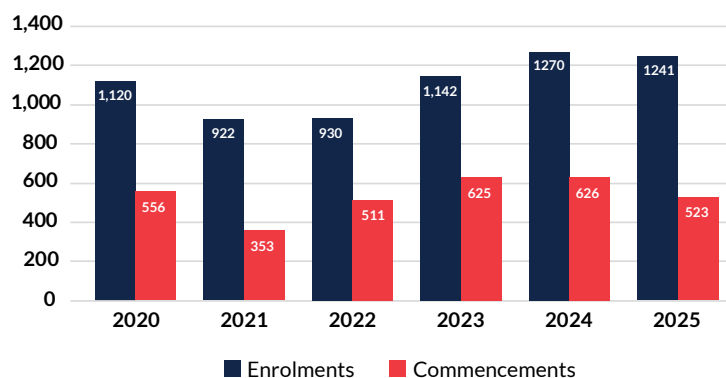


Figure 2.1 Hong Kong Enrolments and Commencements - YTD DEC

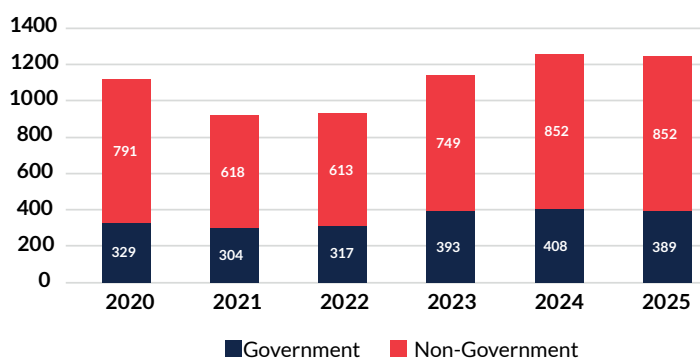


Figure 2.2 Hong Kong Enrolments - YTD DEC

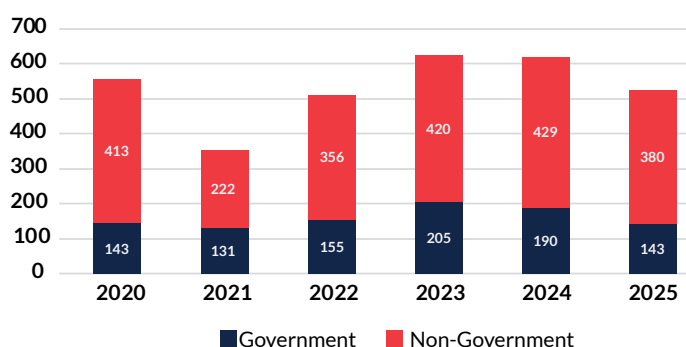


Figure 2.3 Hong Kong Commencements - YTD DEC

Market observations

- Around 50% of AEAS Hong Kong event attendees are relocating Hong Kong families (Australian citizens, PRs, or TRs), representing a valuable and engaged cohort with which schools should be open to discussing enrolment pathways.
- The UK's 20% VAT on private school fees is prompting Hong Kong families who had been considering the UK to reassess, creating opportunities for Australian schools.
- The strength of Hong Kong's higher education sector is becoming a consideration for some families. Australian schools need to articulate clearly the value of an Australian secondary certificate as a pathway to leading universities globally.



Why participate in Hong Kong?

The Hong Kong market is characterised by a balanced distribution of enrolments and commencements across all Australian states and territories.

Hong Kong families are well-informed, open-minded, and consider a wide range of school types, locations, and price points. This makes Hong Kong a strong market for both established schools and those new to market.

May 2027

Onshore Education Agent Workshop



Location	Date	Venue	Cost	Event Type
Melbourne, Australia	Tuesday 25 May and Wednesday 26 May	MCG	\$3,300 incl GST	Agent Workshop

Register online at aeas.com.au/school-events

In 2027, AEAS will host its first Education Agent Workshop in Australia, to be held in Melbourne. This new initiative gives Australian schools direct access to the network of education agents operating onshore, many of whom play a significant role in international student recruitment.

While AEAS in-country events take schools to agents and families in source markets, a substantial proportion of recruitment activity is driven by agents already operating in Australia. These agents maintain active networks into their home source markets, often across multiple countries, and work with families already in Australia and networks overseas who are considering an Australian school education. This workshop brings that agent community to you.

Why should your school attend?

The Melbourne workshop is particularly well-suited to schools that do not regularly travel to source markets. It provides a cost-effective opportunity to build relationships with a broad cross-section of experienced agents in a single day.

Schools that do participate in AEAS overseas events are equally encouraged to attend. Many agents who schools meet in source markets have colleagues or affiliated offices in Australian cities. The Melbourne workshop is a practical way to strengthen those existing relationships closer to home, and to reach agents who are active in Australia but not typically present at offshore events.

Participation also helps schools meet obligations under the National Code of Practice in relation to agent engagement and training, complementing in-country engagement through the AEAS international program.

About the agents

AEAS will bring together two groups of agents:

- Australia-based standalone agents who operate independently but maintain extensive networks into source markets, often across China, Vietnam, South Korea, India, and other key sending countries. These agents are frequently highly experienced but may have limited structured engagement with Australian schools.
- Australian offices of international agencies, where agencies headquartered in source markets have established a presence in key Australian cities. These offices are often actively placing students with schools on behalf of their offshore colleagues.

Offshore agencies may also be invited to attend.

All agents will be screened by AEAS prior to the workshop to ensure a high standard of engagement and an appropriate match with attending schools.

Format and Registration

The workshop will follow the proven AEAS Agent Workshop format: scheduled one-on-one meetings between schools and agents, supported by presentation(s) covering market conditions and current trends.

Register early to confirm your schools place.





Location	Date	Venue	Cost	Event Type
Tokyo, Japan	Thursday 17 June	Tokyo Hilton Shinjuku	\$2,700	Agent Workshop
Seoul, South Korea	Saturday 19 June	Sofitel Ambassador	\$4,950	Exhibition
Seoul, South Korea	Monday 21 June	Sofitel Ambassador	\$2,700	Agent Workshop
Taipei, Taiwan	Friday 25 June	Grand Hyatt Hotel	\$2,700	Agent Workshop
Taipei, Taiwan	Saturday 26 June	Grand Hyatt Hotel	\$4,950	Exhibition
Hong Kong SAR	Sunday 27 June	Cordis Hotel	\$4,950	Exhibition

Register online before 26 February 2027 at aeas.com.au/school-events

Japan

Japan is the sixth-largest source market for school sector students, representing 4% of total enrolments. AEAS returned to Japan in 2026, reintroducing an Agent Workshop in Tokyo. Japan is a relationship-driven market where consistent, long-term engagement is essential.

YTD December 2025 data shows total enrolments were 805, down 12% on the 910 in 2024, with government schools falling 17% to 609 and non-government schools rising 9% to 196. Commencements fell 24% to 551 from 726. Visa lodgements for Q3 2025-26 totalled 438, down only 3% on the 452 lodged in the same period of 2024-25. The lodgement decline is modest compared to other markets.

Market observations

- The Japanese economy has been affected by weak global growth, high inflation, and yen weakness, making overseas education more expensive for families. Despite these challenges, Japan remains the fourth-largest economy globally, with recovery expected in the coming years.
- 76% of 500 visa applications from Japan are for students aged 15 to 19. A significant proportion enrol for short stays under 12 months.
- The Japanese government is expanding English language education, now compulsory in junior high and high school, and being introduced in primary schools. This signals long-term demand for immersive English environments abroad.

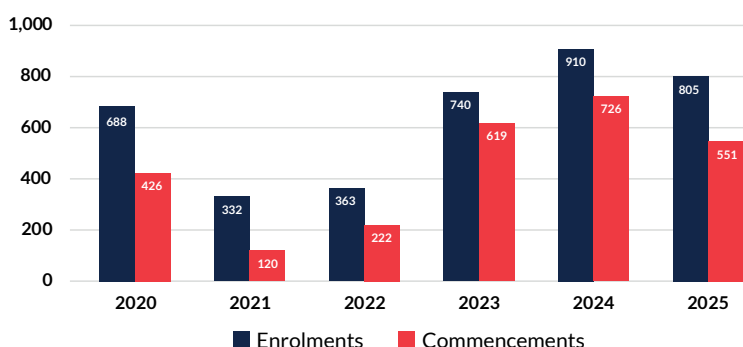


Figure 3.1 Japan Enrolments and Commencements - YTD DEC

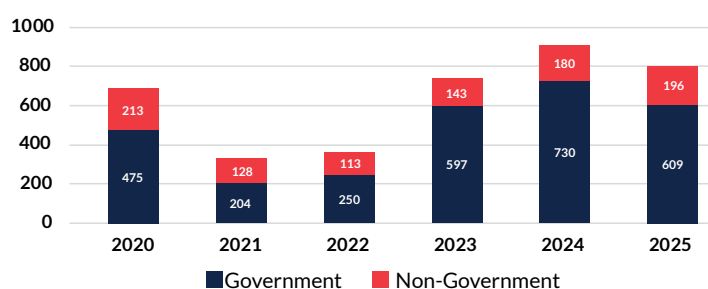


Figure 3.2 Japan Enrolments - YTD DEC

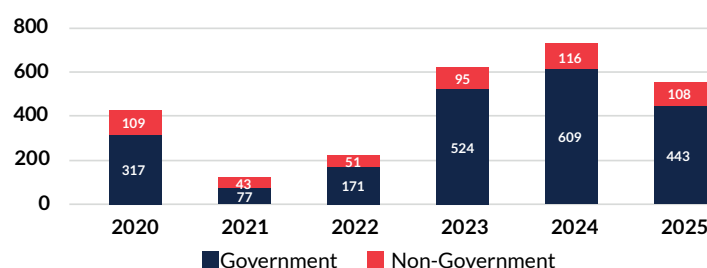


Figure 3.3 Japan Commencements - YTD DEC

South Korea

South Korea is the fourth-largest source market for Australian school sector students, holding a 6% market share. YTD December 2025 enrolments reached 1,135, up 9% on the 1039 in 2024. Government schools were up 9% to 873 and non-government schools up 9% to 262. Commencements rose 8% to 556 from 516, making South Korea one of the few markets showing growth across both measures. Visa lodgements for Q3 2025-26 totalled 398, down a modest 8% on the same period of 2024-25, a softening worth monitoring but not yet cause for concern given the strong enrolment and commencement trajectory.

South Korea is predominantly a younger-student market, with 80% of 500 visa applications for students aged 5 to 14, reflecting strong interest in primary and lower secondary education.

Australia is seen as a safe, affordable, and values-driven alternative to the US. With significant policy uncertainty in North America, more Korean families are considering Australia. Australian schools' focus on holistic education and student wellbeing stands in stark contrast to Korea's high-pressure, exam-driven system, and this distinction resonates strongly with families seeking a more balanced, future-focused experience for their children.

The 2026 Seoul Exhibition attracted 125 pre-registrations and 40 attendees (55 students) on the day, both increases on the previous two years. The 2026 Seoul Agent Workshop reached full capacity with a waitlist for agents, a clear indicator of deepening interest in Australian schools among education agents, particularly those new to the Australian school sector.

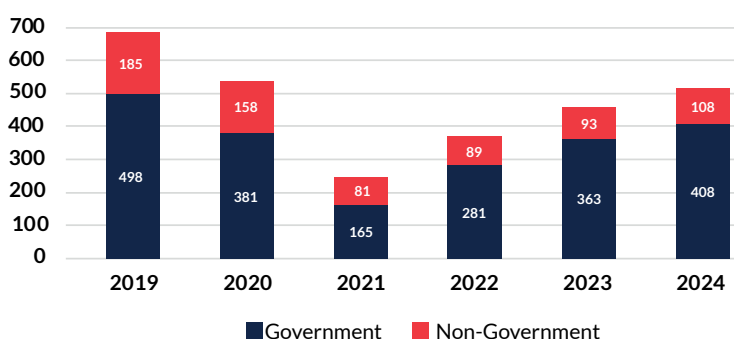


Figure 4.3 South Korea Commencements - YTD DEC

Market observations

- Enrolments and commencements continue to rise. South Korea is one of the few markets with positive growth across enrolments and commencements.
- Private school interest is growing steadily, with agents becoming more knowledgeable about and engaged with independent schools. Government schools dominate but private schools have a compelling story to tell around academic outcomes and university pathways.
- Geopolitical factors, particularly tightening US visa policies, are redirecting families toward Australia.
- A growing share of families seek short to medium-term pathways, often with a parent accompanying on a guardian visa.

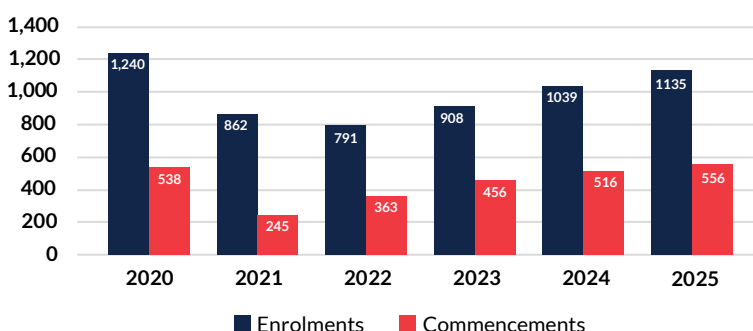


Figure 4.1 South Korea Enrolments and Commencements - YTD DEC

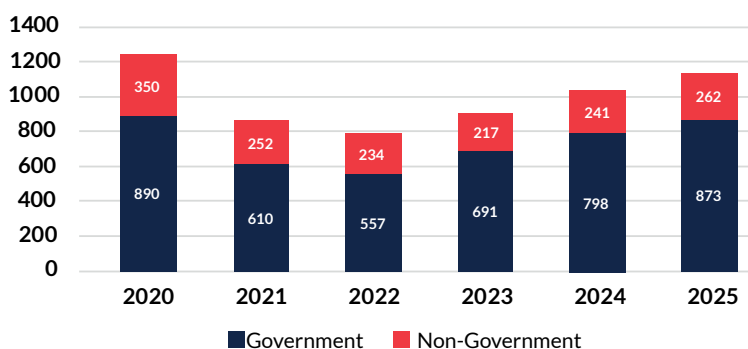


Figure 4.2 South Korea Enrolments - YTD DEC

Why participate in South Korea?

The 2027 Korean events will build on four consecutive years of growing engagement in South Korea. Growing genuine brand awareness in this market requires at least a three-year commitment. Schools that have stayed the course are already seeing applications and enrolments as a direct result.

Taiwan

Taiwan is one of the few growing source markets for school sector students. YTD December 2025 total enrolments were 503, up 33% on the 377 in 2024, with government schools rising 18% to 272 and non-government schools rising 57% to 231. Commencements grew 14% to 261 from 228 the previous year, confirming that Taiwan's growth is translating to actual student starts, not just pipeline interest. Visa lodgements for Q3 2025-26 totalled 168, up 23% on the 137 lodged in the same period of 2024-25. Taiwan is one of the few markets where the forward pipeline is clearly expanding.

The 2026 Taipei Exhibition attracted 203 families who pre-registered with 122 (190 students) attending on the day. Seventeen Australian schools participated. Families demonstrated serious intent and financial capability, and many are interested in guardian visa arrangements.

Agent participation at the Taipei Workshop has grown each year, with many returning for their second, third, or fourth year, reflecting deepening engagement and genuine demand for more knowledge about Australian schools.

Market observations

- Interest is driven by geopolitical uncertainty and declining confidence in the US as a destination.
- Families are financially stable, demonstrate serious intent, with some preferring to accompany children as guardians.
- Strong enrolment and commencement growth across consecutive reporting periods, with non-government school enrolments growing faster than government schools.
- Families are increasingly considering longer-term K-12 pathways rather than single-year placements. The market shows an even split between those seeking immediate enrolment and those planning years ahead.

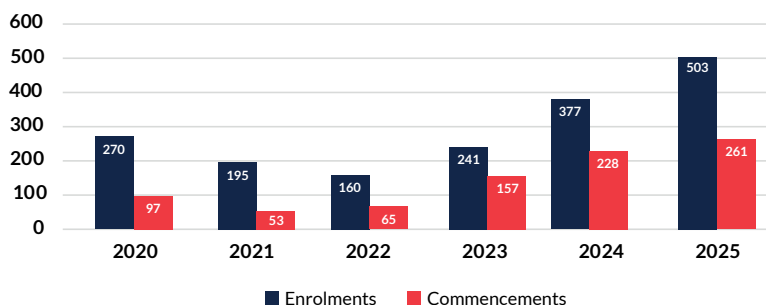


Figure 5.1 Taiwan Enrolments and Commencements - YTD DEC

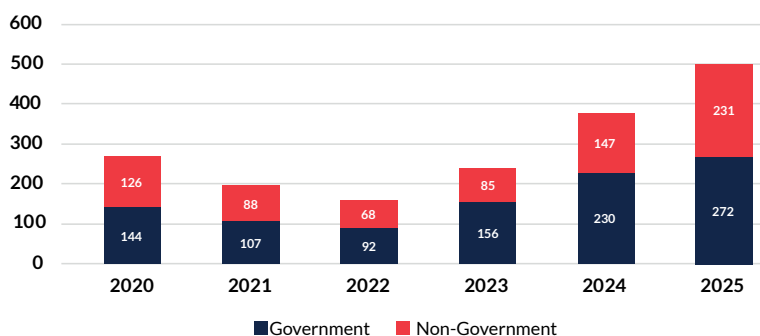


Figure 5.2 Taiwan Enrolments - YTD DEC

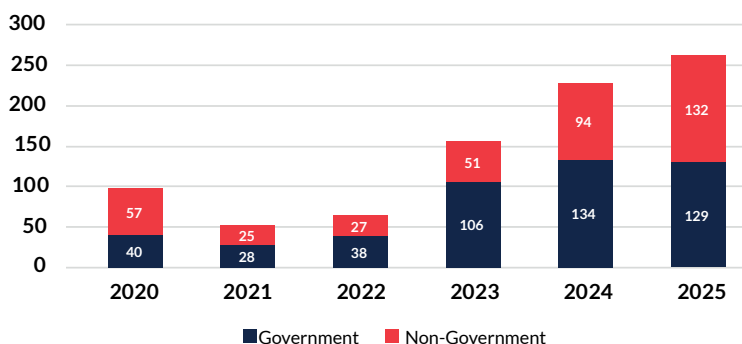


Figure 5.3 Taiwan Commencements - YTD DEC





Hong Kong SAR

AEAS holds two Australian Schools Exhibitions in Hong Kong each year, one in March and one in June. The June Exhibition is a smaller event, both in the number of participating schools and family attendance. However, June is a critical recruitment period in Hong Kong, as families often make decisions after receiving end-of-year school reports. A significant number of attending families are therefore seeking short- to mid-term commencements.

The June 2026 Hong Kong Exhibition attracted 222 families who pre-registered with 109 (144 students) attending on the day. 17 schools participated. Schools described this event as highly professional, with quality conversations and a strong pipeline for future enrolments.

Hong Kong families continue to consider a wide range of price points, school types, locations, and accommodation models, making the market well suited to both established and schools new to market. Around half of attendees are relocating Hong Kong families (citizens, PRs, or TRs) rather than full-fee overseas students, and schools are encouraged to consider how their offering aligns with this engaged cohort. Interest is also being assisted by the UK VAT on private school fees, with Australia increasingly seen as a high-quality and more affordable alternative.

Spaces are limited, so early registration is encouraged.

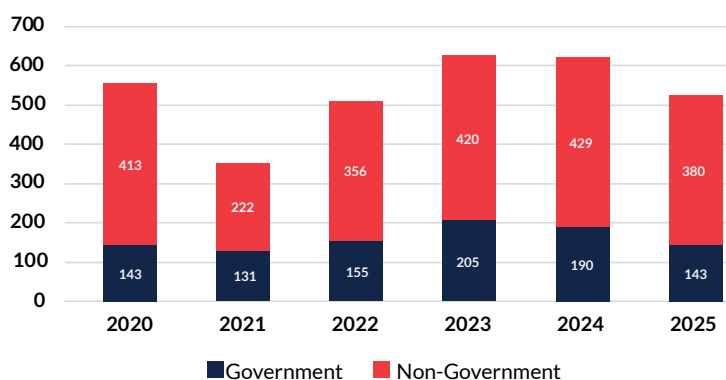


Figure 6.1 Hong Kong Commencements - YTD DEC

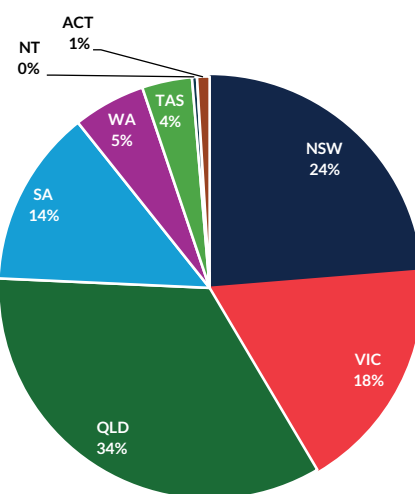


Figure 6.2 Hong Kong Commencements by State



Location	Date	Venue	Cost	Event Type
HCMC, Vietnam	Friday 10 September	Sheraton Grand Opera Saigon	\$2,700	Agent Workshop
HCMC, Vietnam	Saturday 11 September	Sheraton Grand Opera Saigon	\$4,950	Exhibition
Hanoi, Vietnam	Sunday 12 September	Lotte Hanoi	\$4,950	Exhibition
Hanoi, Vietnam	Tuesday 14 September	Lotte Hanoi	\$2,700	Agent Workshop
Phnom Penh, Cambodia	Friday 17 September	Hyatt Regency	\$2,700	Agent Workshop
Phnom Penh, Cambodia	Saturday 18 September (AM)	Hyatt Regency	\$4,950	Exhibition
Bangkok, Thailand	Sunday 19 September (PM)	Marriott Marquis	\$4,950	Exhibition
Bangkok, Thailand	Tuesday 21 September	Marriott Marquis	\$2,700	Agent Workshop

Register online before 28 May 2027 at aeas.com.au/school-events

Vietnam

Vietnam remains the second-largest source market for Australian schools, although the market has contracted significantly over the past two years. YTD December 2025 total enrolments declined 12% to 3,931 from 4,449 in 2024, with government schools down 10% to 3,368 and non-government schools down 20% to 563. Commencements fell 42% to 1,302 from 2,253, including a 59% decline in non-government school commencements to 179. The forward pipeline also remains subdued, with Q3 2025–26 visa lodgements of 541, down 30% on the same period in 2024–25. The full-year 2024–25 figure of 1,012 lodgements was itself down 58% on the 2,391 lodged in 2023–24.

These declines reflect a combination of factors. Vietnam's softer economic conditions and broader global uncertainty have made families more cautious about major financial commitments. The country's ongoing anti-corruption campaign has also contributed to a more conservative environment among affluent families, with some becoming increasingly mindful of the visibility associated with significant overseas expenditure. While no specific law targets overseas study, this broader climate appears to have influenced family decision-making.

Australian policy settings have also affected market confidence. Public debate around international student caps and visa integrity created uncertainty, despite the school sector not being the intended focus of these measures. Vietnam's visa processing risk rating was increased to Level 3 in late 2024 following fraudulent visa applications, adding a further layer of caution for prospective families. Despite these challenges, Vietnam remains one of Australia's largest and most established school markets, and schools that maintain visibility and strong local partnerships are likely to be well placed when family confidence improves.

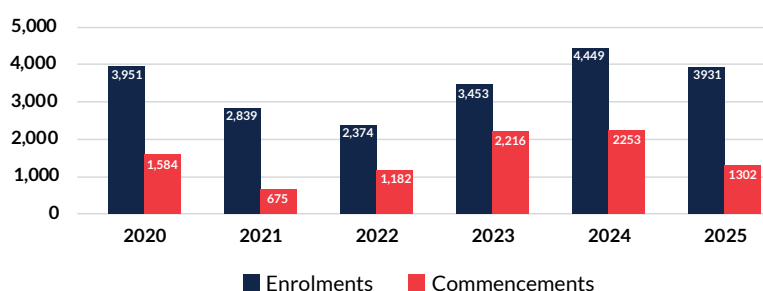


Figure 7.1 Vietnam Enrolments and Commencements - YTD DEC

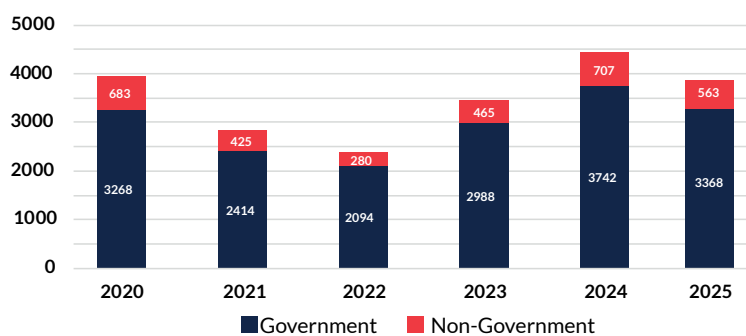


Figure 7.2 Vietnam Enrolments - YTD DEC

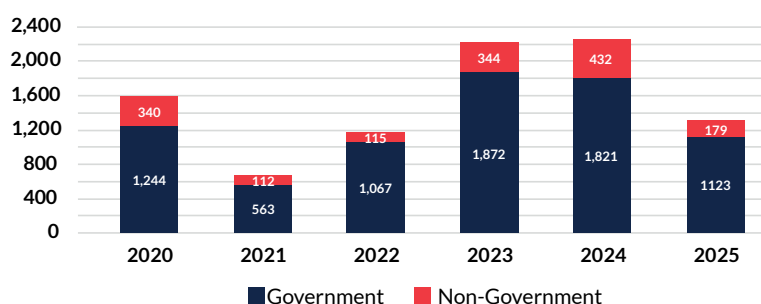


Figure 7.3 Vietnam Commencements - YTD DEC

Market observations

- Recovery depends on clear communication about the school sector's status and consistent, accurate messaging from AEAS and schools to families and agents.
- Agent quality varies significantly. AEAS has excluded some under-performing agencies from future Workshops, particularly in HCMC. The Hanoi Workshop demonstrated that well-prepared, engaged agents do exist in this market and produce better outcomes.
- Vietnam is not currently a market for short-term wins. Schools that consistently build brand presence and engage agents are the ones securing enrolments. Several schools reported confirmed enrolments directly from the 2025 events despite lower attendance.
- The underlying fundamentals remain favourable. Vietnam has the fastest-growing middle class in South East Asia, with over 20 million citizens aged 5-19, and strong demand for international education.
- AEAS will limit the number of schools participating in the 2027 Vietnam events to match current demand, ensuring schools have higher-quality engagement.



Cambodia

Cambodia is the seventh-largest source market for Australian schools. YTD December 2025 total enrolments were 680, up 5% on 647 in 2024, with government schools growing 2% to 581 and non-government schools rising 27% to 99. Commencements fell 15% to 245, reflecting the longer lead time from initial enquiry to application in this developing market. Visa lodgements for Q3 2025-26 totalled 180, down 20% on the same period of 2024-25, underlining the need for sustained marketing and agent engagement.

Cambodia is a small but growing market, fuelled by economic development and a rising middle and upper class with the financial capacity and aspiration to explore quality overseas education for their children. Cambodia's population of 16.3 million has a median age of just 24.3, making it one of the most demographically dynamic markets in the region. The 2025 Phnom Penh Exhibition – the fourth annual AEAS event in Cambodia – generated 202 pre-registrations and 101 family attendances.

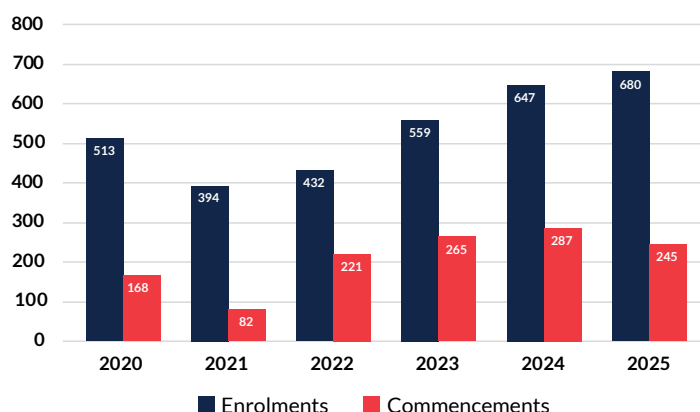


Figure 8.1 Cambodia Enrolments and Commencements - YTD DEC

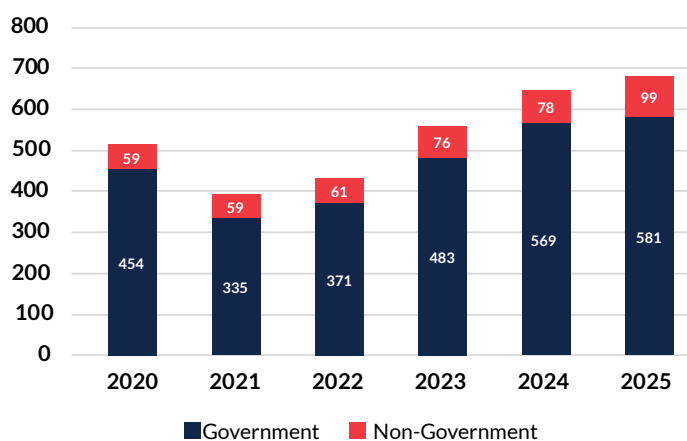


Figure 8.2 Cambodia Enrolments - YTD DEC

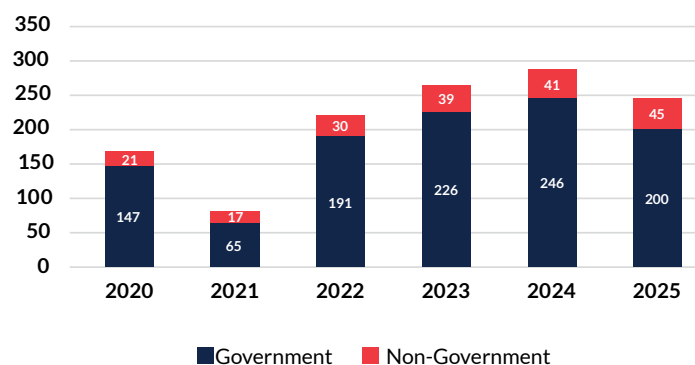


Figure 8.3 Cambodia Commencements - YTD DEC

Market observations

- Sectors such as tourism, manufacturing, and construction continue to drive Cambodia's economic growth, expanding the pool of families with the means and aspiration to consider overseas schooling.
- Growth in enrolments - over consecutive reporting periods - is dominated by government schools. Non-government school interest is building and growing faster than government school placements.
- Many families are in the early stages of exploring options. Schools should plan for longer enquiry-to-application timelines and invest in consistent lead nurturing.
- Cambodia requires a long-term mindset. Schools attending multiple years report families returning year-on-year with more focused questions and greater readiness to proceed to application.
- The agent base remains small. Those engaged are professional and eager to learn and deepen their understanding of the Australian school system.
- AEAS runs ongoing year-round marketing in Cambodia building awareness of school admission requirements, appropriate entry points, and application processes.

Thailand

Thailand was a standout market in 2025. The Bangkok Exhibition set a near 15-year attendance record with approximately 100 families on the day, and the Agent Workshop was waitlisted.

YTD December 2025 tells a cautious story with enrolments falling 15% to 222 (from 262 in 2024), with government schools down 18% to 152 and non-government schools down 8% to 70. Commencements fell 32% to 80 from 117. Against this, the forward pipeline shows promise with visa lodgements for Q3 2025-26 totalling 63, up 17% on the same period of 2024-25. This is an encouraging signal that event momentum evident at the 2025 Bangkok exhibition is beginning to translate into applications.

Thai parents prioritise safety, security, and proximity to home. Boarding remains a popular accommodation option. Interest in guardian visa arrangements is also rising (28% in 2025 versus 23% in 2024). Notably, 36% of students enquired about at the 2025 Exhibition were aged 10 or younger, indicating families are planning significantly earlier than before.



Market observations

- UK schools remain highly active in Thailand, offering scholarships and in some cases absorbing the VAT to remain competitive. The UK VAT on private school fees is prompting genuine reassessment among Thai families who had previously considered the UK as their first choice, creating opportunity for Australia.
- Major changes to New Zealand's school and university pathways from 2026-2027 will reduce that destination's comparative advantage, making Australia and New Zealand more directly comparable for families and agents.
- Global economic headwinds and US tariff uncertainty have dampened Thai consumer confidence. However, enquiries for Australia have increased, suggesting motivated families are actively seeking alternatives.
- Agent commission levels remain a discussion point in this market. Australian schools should be prepared to address this openly.
- Schools are strongly encouraged to attend both the exhibition and agent workshop in Bangkok.

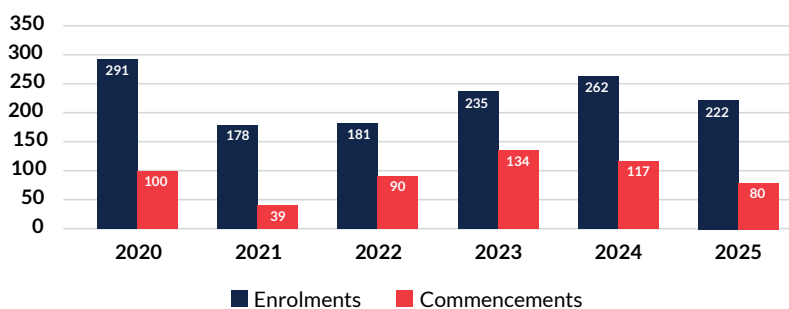


Figure 9.1 Thailand Enrolments and Commencements - YTD DEC

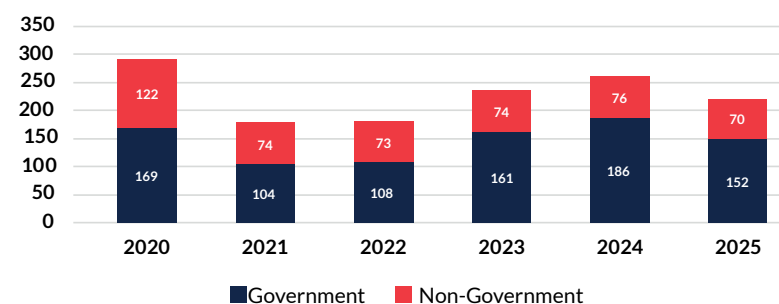


Figure 9.2 Thailand Enrolments - YTD DEC

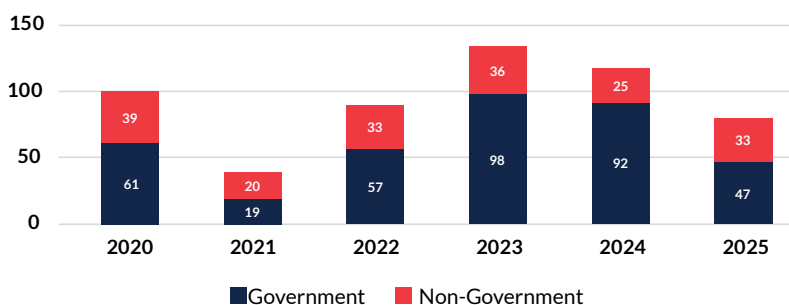


Figure 9.3 Thailand Commencements - YTD DEC



November 2027

India and Sri Lanka



Location	Date	Venue	Cost	Event Type
Delhi	Friday 12 November	TBC	\$2,700	Agent Workshop
Delhi	Saturday 13 November	TBC	\$4,950	Parent Exhibition
Bangalore	Monday 15 November	TBC	\$2,700	Agent Workshop
Colombo, Sri Lanka	Thursday 18 November	TBC	\$2,700	Agent Workshop

Register online before 28 May 2027 at aeas.com.au/school-events

India

YTD December 2025 data shows total enrolments of 315, down 10% from 351 in 2024, with government schools declining 4% to 234 and non-government schools declining 24% to 81. Commencements fell 31% to 107 from 154, while Q3 2025–26 visa lodgements totalled 69, down 17% on the same period in 2024–25. The full-year 2024–25 total of 108 visa lodgements was down 32% on 2023–24, reflecting the impact of Australian Government policy changes, higher visa application charges and tighter visa settings.

Despite these short-term headwinds, India remains one of the world's largest outbound student markets and an underdeveloped market for Australian schools. Current enrolment levels have been achieved with relatively little direct engagement by Australian schools and there is an opportunity to inform agents and families about an Australian school education. Schools that have participated in recent AEAS events in India are already reporting encouraging interest from both families and education agents, highlighting the longer-term potential for schools prepared to invest in building their profile in the market.

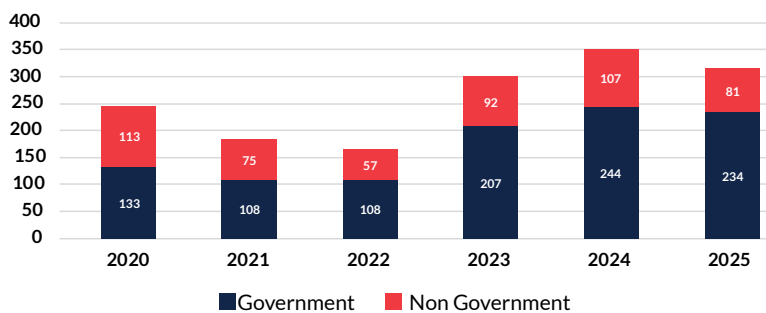


Figure 10.2 India Enrolments - YTD DEC

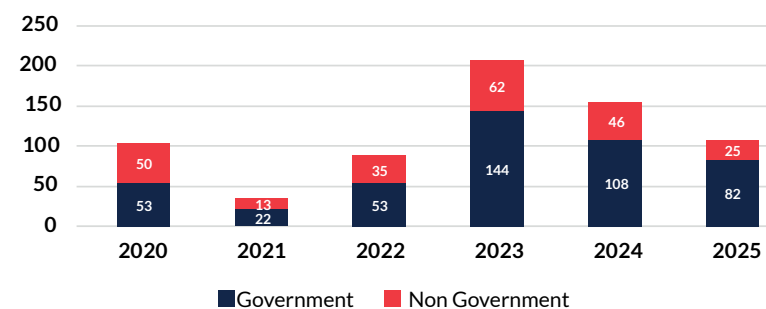


Figure 10.3 India Commencements - YTD DEC

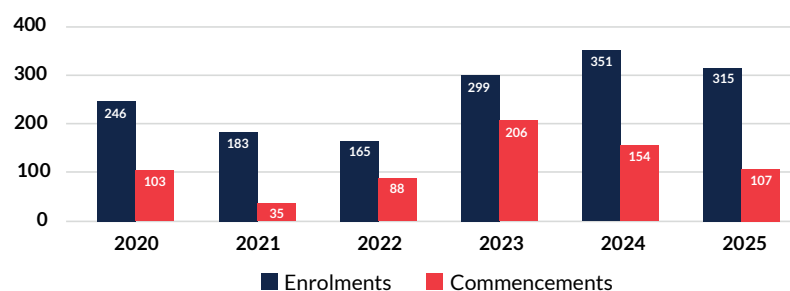


Figure 10.1 India Enrolments and Commencements - YTD DEC





Market observations

- India is the fifth-largest economy in the world and home to over 500 million people aged 5 to 24. With 1.5 million schools and 250 million school-age children, the scale of potential is significant.
- With Australia strongly established in India's higher education market, Australian schools are well positioned to offer a trusted alternative for parents seeking earlier entry into the Australian education system.
- While volumes remain small, there is a need for better education of families and agents about Australian schools, how to apply and visa processes.
- Experiences from AEAS events confirm that agents are eager to learn and families are receptive when presented with clear information. Schools building relationships now will benefit from early-mover advantage in what is expected to become a more active market.
- India is not a uniform market. There is considerable diversity across states in education quality, English language access, and socioeconomic status.

Why participate in India and Sri Lanka?

The AEAS 2027 India and Sri Lanka events offer schools an opportunity to explore the markets, develop relationships, and contribute to shaping knowledge and trust in the Australian school sector.

AEAS will provide a safe, structured and well-supported platform for schools looking to explore India and Sri Lanka.

Sri Lanka

Sri Lanka is an emerging source market. Although volumes remain modest, the most recent data suggests a market beginning to gain momentum. YTD December 2025 total enrolments reached 162, up 21% on the 134 recorded in 2024, with government enrolments rising 15% to 121 and non-government up 41% to 41. Commencements fell 17% to 64, likely reflecting the flow on impact of Australian government policy changes. The forward pipeline is encouraging with visa lodgements for Q3 2025-26 totalling 103, up 87% on the same period of 2024-25. This is the strongest year-on-year pipeline growth of any market in the 2027 program.

Market observations

- Sri Lanka has a population with strong cultural affinity for overseas education in Australia, the UK, and New Zealand.
- A significant Sri Lankan diaspora community in Australia, provides an important network of influence for families considering overseas schooling.
- Economic volatility following the 2022 crisis initially dampened overseas education activity. The recovery in lodgement volumes in 2025-26 suggests confidence is returning as economic conditions stabilise.
- Middle and upper-class Sri Lankan families, many with professional backgrounds and overseas connections, represent a high-quality prospective student cohort.
- Non-government school interest is growing faster than government schools.
- Awareness of Australian schooling pathways among families and agents remains limited, creating both a challenge and an opportunity for early-mover schools.
- AEAS has planned an inaugural education agent workshop in Colombo to test market interest.



November 2027

AEAS Seminars for Australian Schools

Location	Date	Event Type
Brisbane	Monday 22 November	AEAS Seminar - International Education Update
Sydney	Wednesday 24 November	AEAS Seminar - International Education Update
Melbourne	Friday 26 November	AEAS Seminar - International Education Update
Adelaide	Monday 29 November	AEAS Seminar - International Education Update
Perth	Wednesday 1 December	AEAS Seminar - International Education Update

AEAS seminars for Australian schools

AEAS will once again host a series of annual international education seminars in five cities in November. These events provide a valuable opportunity for Directors and Managers of International Programs, Admissions and Marketing Managers, International Student Coordinators, and other interested school staff to connect, exchange insights, and stay informed.

Join us to hear the latest updates on international education in the school sector, along with market intelligence from key source countries. There is no cost for schools to attend.

If your school is interested in hosting a seminar, please contact tracey@aeas.com.au



Terms & Conditions

All participants must read and acknowledge the 2027 AEAS Events Terms and Conditions prior to submitting their online registration.

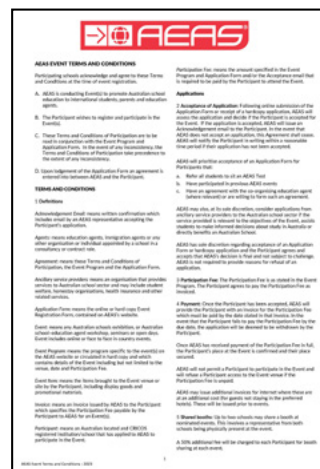
Cancellation terms apply to all registrations. Please refer to the Terms and Conditions.

Event registration

Places are limited for some events. Secure your place by registering early.

You will receive an email confirming receipt of your application. AEAS will then send approved applicants an invoice for confirmed events.

Schools will be provided with access to the relevant Online Information Portal for each event series approximately three months prior to events to assist with preparation and planning.



[Click to view](#)

Register online!

aeas.com.au/school-events



AEAS Contacts



Tracey O'Halloran
Managing Director, AEAS

☎ +61 3 9645 0077
☎ +61 412 294 495
✉ tracey@aeas.com.au



Brett McGeorge
Director, Marketing and Business Development

☎ +61 3 9645 0077
☎ +61 418 564 955
✉ brett@aeas.com.au





Level 1 / 215 Park Street
South Melbourne
Victoria 3205 Australia

 aeas.com.au

 +61 3 9645 0077

 admin@aeas.com.au

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