

# Updated Snapshot: Australia (AUS)

## Statement

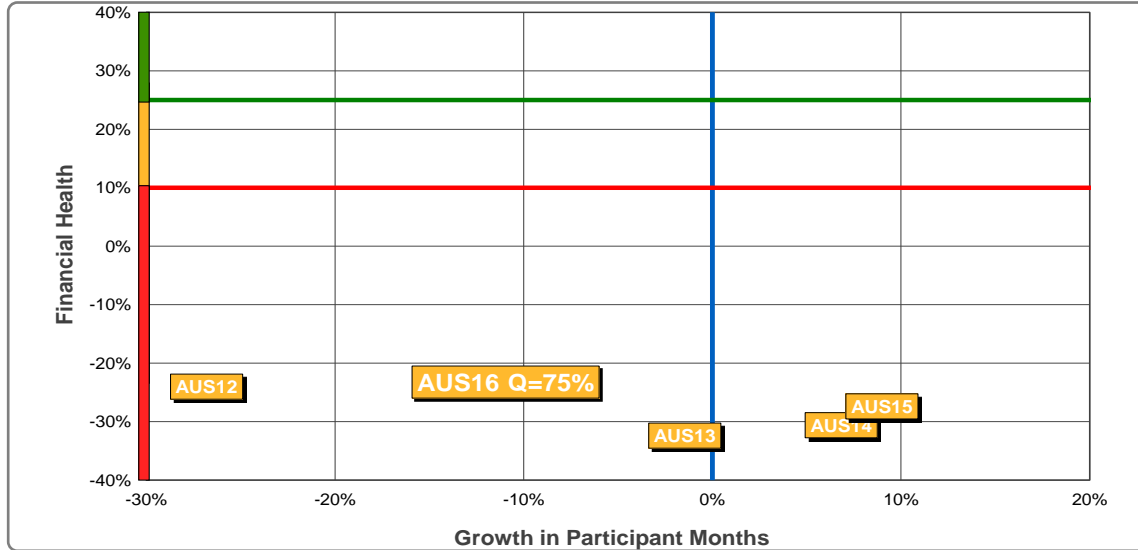


## Partner Organizations 2016

ARG	AUS	AUT	BFL	BFR	BIH	BOL	BRA	CAN	CHI
CHN	COL	CRC	CRO	CZE	DEN	DOM	ECU	EGY	ESP
FIN	FRA	GER	GHA	GUA	HKG	HON	HUN	INA	IND
ISL	ITA	JPN	KEN	KOR	LAT	MAS	MEX	NED	NOR
NZL	PAN	PAR	PER	PHI	POL	POR	RSA	RUS	SLO
SRB	SUI	SVK	SWE	THA	TUN	TUR	USA	VEN	

■ Sending to: 20
 ■ Hosting from: 20

## 3D Health Indicators 2012-2016



## KPIs

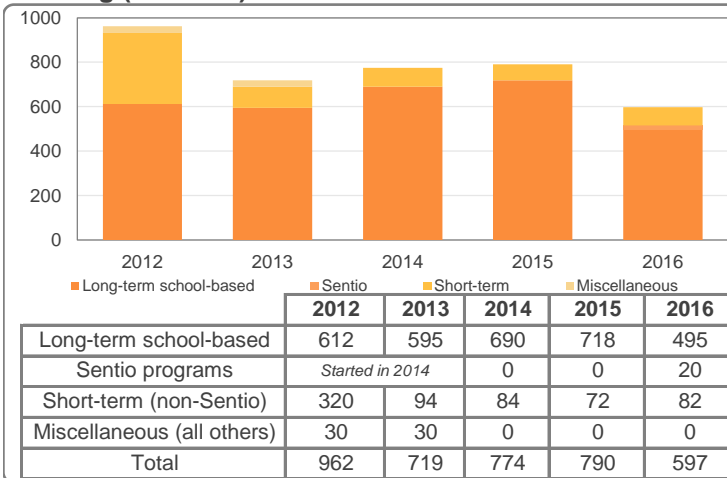
Yr	Growth	Finances	Quality
16	-16%	-23%	75%
15	+7%	-27%	79%
14	+4%	-31%	80%
13	-4%	-32%	84%
12	-29%	-24%	73%

## NPPR Status

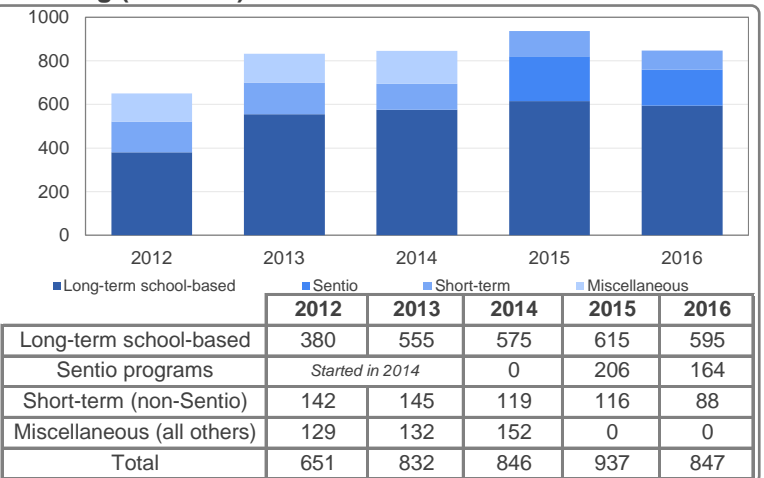
Yr	Phase
16	Phase III
15	Phase III
14	Phase III
13	Phase III
12	Phase III

Partner has an unsettled LoC.

## Sending (Pax Mos) 2012-2016



## Hosting (Pax Mos) 2012-2016



## Quality Assessment 2014-2016

Quality	Hosting CSE				Sending CSE				PSE	Overall Eval Score	Bonus/ Penalty	Final Quality Score
	host fam	school	other stu	other nat fam	stu	nat fams	other host fams	other schools				
2016 Network Total	78%	85%	94%	92%	94%	92%	78%	85%	92%	88%	-1%	87%
2016 (CSE16, PSE16-15)	71%	78%	94%	88%	87%	88%	82%	85%	54%	81%	-6%	75%
2015 (CSE15, PSE15-14)	78%		86%	88%	92%	81%	76%	78%	69%	81%	-2%	79%
2014 (CSE14, PSE14-13)	60%	80%	95%	85%	85%	91%	66%	90%	96%	83%	-3%	80%

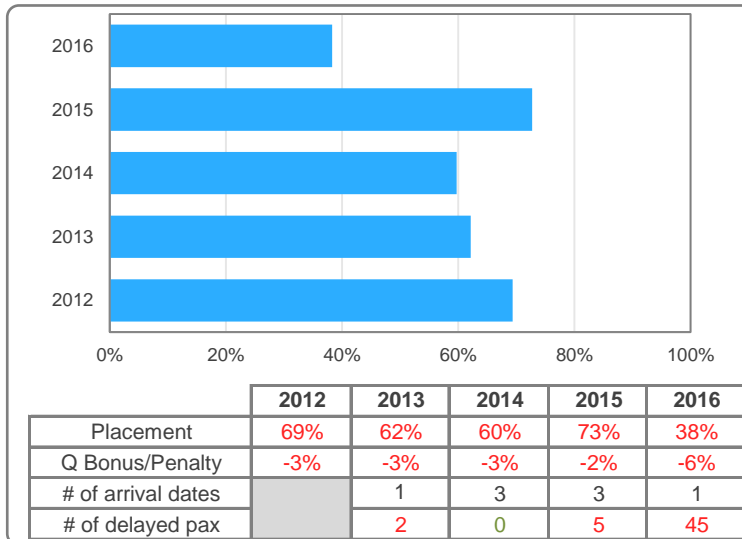
## Key Financial Numbers in Effective USD 2013-2015

Finances	Annual Turnover	% of total	Total Expenses	% of total	Net Results	% of unr. net assets	Current Assets	% of expenses	Unr. Net Assets	% of expenses
2015 Network Total	183,453,070	100%	178,003,152	100%	5,449,918	8%	116,051,027	65%	70,545,137	40%
2015	1,671,463	1%	1,640,045	1%	31,418	***	167,807	10%	-380,932	-23%
2014	1,825,407	1%	1,806,598	1%	18,809	***	239,202	13%	-494,819	-27%
2013	1,719,713	1%	1,795,342	1%	-75,629	***	225,282	13%	-549,477	-31%

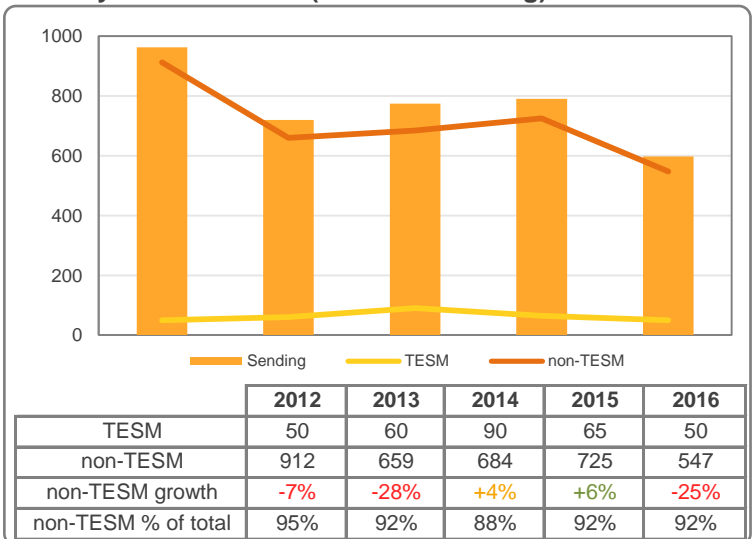
\*\*\*Unrestricted Net Assets is meaningless because these are negative

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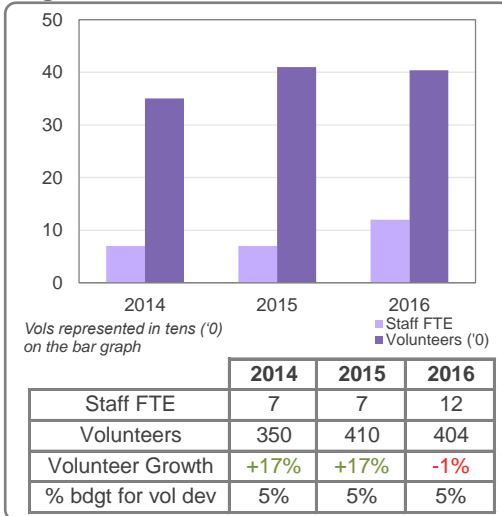
## On-time Placement Performance



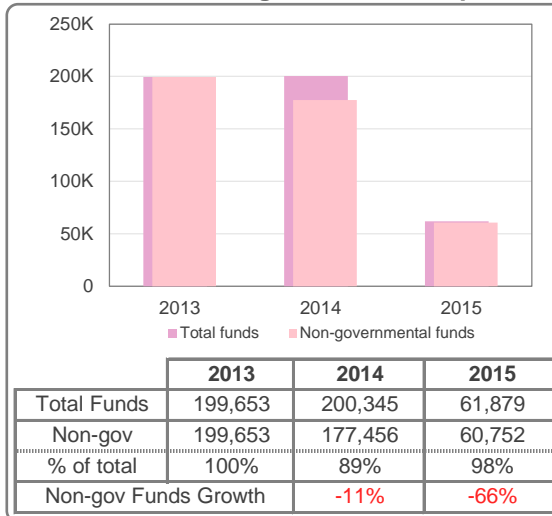
## Country Diversification (Pax Mos Sending)



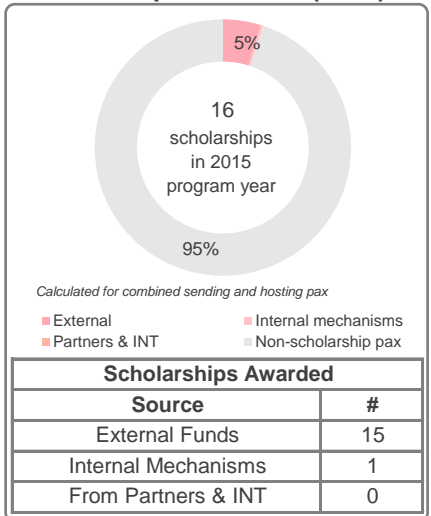
## Organizational Structure



## External Fundraising for Scholarships



## Scholarships Awarded (2015)



## Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	80	2	9
% of Total	19.2%	0.5%	2.2%

W = What Every AFSer Should Know About Intercultural Learning.  
1 - 3 = LP levels 1, 2, and 3; QT = Qualified Trainers

Orientations								
	PD	A	PA	MS	PR	EOS	PoR	Other
Pax	●	●	●	●	●		●	
Host Fams	●		●					
Nat Fams								
Sch/CPOs								
Attendance:	0% (blank)	1-25% ●	26-50% ●	51-75% ●	76-100% ●			

PD = pre-departure, A = arrival, PA = post-arrival, MS = mid-stay, PR = pre-return, EOS = end-of-stay, PoR = post-return, Oth = other

## AFS Market Share and Competitor Landscape

Estimated Market Share (Latest Year Available)		
Outbound	Inbound non-fee paying	Inbound fee & non-fee
3.9%	6.3%	0.4%

Non-fee paying = not paying tuition and hosted in volunteer host families;  
Fee paying = paying tuition and often hosted in paid host families

Competitors	
Sending (sc programs)	Hosting (sc programs)
Student Exchange Australia & New Zealand, Rotary, Schools	Fee-paying international student programs, Student Exchange Australia & New Zealand, Rotary
Sending (18+ programs)	Hosting (18+ programs)
Universities and schools, Student Exchange Australia & New Zealand, NACEL	Universities and schools, Student Exchange Australia & New Zealand, NACEL

## Educational System and Accreditation

Educational Designation & Credit Agreement	
Designated as an Educational Entity	
(Full) Credit Agreement	
(Partial) Credit Agreement	

## Ties to the World around AFS

International Exposure and Collaboration with Others	
Joint project/new affiliation	
External forum or event	

## Market Environment

**Market Trends and Forecasts**  
Inbound mobility is dominated by the full fee-paying market (i.e., international students paying tuition and host family fees in full). For outbound mobility, there is a growing trend towards schools organizing their own group programs or study tours. There are options for AFS to position itself as a service provider to this market. Because of increasingly strict regulatory environments within Australia (at the state/territory level), AUS does not see opportunity for significant growth in AFS' traditional programs (YP/SM).