

**ENGLISH AUSTRALIA SURVEY OF  
MAJOR ELICOS REGIONAL MARKETS**

**IN 2008**

**EXECUTIVE SUMMARY**

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**E N G L I S H**



**A U S T R A L I A**

# Survey of major ELICOS regional markets in 2008

## Executive Summary

of a report prepared for **English Australia** by **Environmetrics**

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## Introduction

This is the thirteenth survey of the ELICOS sector commissioned by English Australia. A benchmark study was commissioned in 1996, which covered enrolment statistics for the previous calendar year. A follow-up study was conducted in 1997. These two studies were undertaken by Austrade. This current study is the eleventh undertaken by Environmetrics and covers enrolments for the 2008 calendar year.

The purpose of the study is to gain a clear picture of the number of overseas students and visitors who undertook English language studies in Australia in 2008. Particular attention was taken to obtain statistics on:

The purpose of the study is to gain a clear picture of the number of overseas students and visitors who undertook English language studies in Australia in 2006. Particular attention was taken to obtain statistics on:

- student numbers by nationality;
- student numbers by visa type;
- numbers of individual and group enrolments;
- length of enrolments; and
- enrolments in each state or territory.

This report presents the main findings of the study. Data is analysed to provide an overall profile of the ELICOS sector, as well as a profile for Asia, Europe, Central and South America and, for the sixth year, the Middle East.

## Executive Summary

### **Total enrolments (all nationalities, individuals and groups)**

- Total ELICOS enrolment numbers for 2008 were 162,114, an increase of 18% from 2007 (137,019). A large part of the overall growth was in enrolments from China and India. The ELICOS sector has more than doubled in size in the five years since 2003 when ELICOS enrolments were 78,338.
- The proportion of enrolments contributed by each region has shifted slightly between 2007 and 2008. Asia remained the largest source of enrolments, accounting for 73% of the total (down from 74% in 2007). Central & South America increased its share (to 11% from 9%), as did the Middle East (to 5% from 4%). Europe's share declined, however, to 11% from 13%.

- All states showed growth in enrolments, with Victoria and South Australia showing the strongest percentage level of growth (+25%) and NSW showing the strongest growth in numbers of students (+7,989).
- NSW accounted for 38% of all enrolments in 2008, followed by Queensland (26%), Victoria (22%), Western Australia (10%) and South Australia (4%). These figures show stability in market share for Queensland, South Australia and Western Australia with an increase in market share for Victoria (1%), and a decrease for NSW (-1%).
- Asia was the most important region for all states. China is the most important source country for NSW, Victoria and South Australia. South Korea is the most important source country for Queensland and WA. Japan is also an important source country for Queensland.
- The top ten source countries for 2008 were (in order): China, South Korea, Japan, India, Brazil, Thailand, Vietnam, Saudi Arabia (entered this year), Taiwan and Colombia. Europe is no longer represented in the top ten contributing countries.
- China and South Korea were the two major source nationalities in 2008, with China overtaking Korea to be the number one source country for the first time. Japan, though still strong, has dropped to third with decreasing enrolments. India experienced the largest absolute increase in enrolment numbers (6,207) followed closely by China (5,791). Saudi Arabia had the highest percentage increase (92%).
- Forty six percent of all ELICOS enrolments in 2008 came from the top three source countries (a decline compared with 52% in 2007). Sixty seven percent came from the top ten source countries (a decline compared with 79% in 2007).

#### **Asia-Pacific region total enrolments (individuals and groups)**

- Total numbers of enrolments for the Asia Pacific region increased from 101,463 in 2007 to 117,834 in 2008. This represents an increase of 16%.
- The largest increase in the number of enrolments for an individual nationality was shown by India (6,207), though China also had a strong increase in enrolments (5,791). All nationalities experienced increases except for Japan (13% decrease).

- China became the dominant country in the Asia Pacific market, contributing 25% of the region's total enrolments. South Korea dropped to second place with 22%. Japan has continued to decline though has still remained in third place with 16% of enrolments.
- NSW accounted for 37% of all Asian enrolments in 2007, followed by Victoria (26%), Queensland (24%), Western Australia (8%) and South Australia (5%).
- The proportion of student visas increased to 62%, with visitor visas decreasing to 18% and working holiday and other visas increasing to 20%.
- Total student weeks increased from 1,213,169 to 1,402,012 in 2008 (a 16% increase), while the average number of weeks spent studying decreased slightly (from 12.0 in 2007 to 11.9 in 2008).
- China (28%) and South Korea (23%) accounted for the largest number of student weeks in 2008.
- Students from the Asia Pacific region injected \$1,320 million into the Australian economy in 2008, an increase of 18% on 2007.
- The number of Asian students in groups increased from 13,270 to 13,463. The average number of weeks for groups decreased from 4.7 to 3.7 weeks.

#### European region (individuals and groups)

- Europe saw a slight increase in enrolments after the decline in 2007. The number of European enrolments increased by 3% in 2007 to 17,733.
- Increases were seen in key countries Germany (23%) and France (11%) as well other countries Russia (34%) and Hungary (21%).
- However there were decreases in the key country Switzerland (6% decrease on 2007) that led to its dropping out of the top ten countries. Decreases were also seen from the Czech Republic (16% decrease), Poland (11% decrease) and Slovakia (3% decrease).
- As in previous years Swiss enrolments made up a large proportion of the European market, accounting for 24% (though declining from 26% in 2007) of all European enrollees, followed by French enrolments, with 16%.

- The state market share has changed considerably for Europe in 2008. NSW accounted for 44% of all European enrolments in 2008, however Queensland with 34% (an increase on 25% in 2007) has shown the most positive impact in the market. Western Australia's share has dropped from 19% to 15%. Victoria (6%) and South Australia (2%) have remained stable.
- The visa status of European enrolments changed in 2008. Visitor visas still dominate but have dropped to 44% (from 51%) of European enrolees, working holiday and other visas have grown to 25% (up from 16%) and student visas have had a slight decrease to 31% (from 33% in 2007).
- The total number of weeks enrolled has increased from 2007 levels to 153,875 (an increase of 3% in line with student enrolments). The average number of weeks in a course remained at 8.7.
- European enrolees spent around \$131 million in 2008 (down slightly from \$133 million in 2007).

#### **Central and South American region (individuals and groups)**

- The Central and South American region continued to grow in 2008 as it has done since 2004. There was an increase of 41% in total enrolments from the area (from 12,359 to 17,472).
- Brazil again yielded the largest number of enrolments, and experienced a 40% increase from 2007 (a total of 10,492 enrolments for 2008). The second most important source country, Colombia, experienced a solid increase (51%) in enrolments. Increases were seen for all Central and South American nationalities except Argentina.
- NSW accounted for 39% of all Central and South American enrolments in 2008, followed by Queensland (36%), Victoria (12%), Western Australia (12%) and South Australia (1%).
- 76% of all Central and South American enrolees held student visas (down from 81% in 2007), with 9% arriving on visitor visas (down from 16% in 2007) and 16% arriving on working holiday and other visas (up from 3% in 2007).
- There has been a 41% increase in the total number of student weeks (261,589), with the average number of student weeks remaining stable at 15.0 weeks.

- Total estimated spending of Central and South American enrollees was \$225.8 million compared with \$165.3 million in 2007. This is an overall increase of 37% from 2007.

### **Middle Eastern Region (individuals and groups)**

- The Middle Eastern region continues to grow in importance as a source country for ELICOS enrolments. Total enrolments for the Middle Eastern region in 2008 were 8,413, representing 51% growth over 2007 figures.
- The biggest Middle Eastern contributors were Saudi Arabia (increase of 92%) Turkey (increase of 39%) and Emirates (42%). Egypt however declined this year (decrease of 21%) after several years of strong growth.
- NSW accounted for 39% of all Middle Eastern enrolments, followed by Victoria (28%), Queensland (18%), Western Australia (12%) and South Australia (4%).
- 80% of all Middle Eastern enrolments held student visas, down from 84% in 2007. Visitor visa declined to 8% (down from 13%) and working holiday and other visas increased to 12% (up from 3%).
- The total number of student weeks for Middle Eastern enrolments was 199,412 (an increase of 80%), and the average number of student weeks was 23.7 (up from 20.0 in 2007).
- The total estimated spending of Middle Eastern enrollees was \$199.3 million (up from \$98.2 million in 2007). This is an overall increase of 103% on 2007.

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