ENGLISH AUSTRALIA SURVEY OF MAJOR ELICOS REGIONAL MARKETS IN 2006

EXECUTIVE SUMMARY

Published June 2007

ENGLISH AUSTRALIA

Survey of major regional markets for ELICOS institutions in 2006

Executive Summary

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

June 2007

English Australia contact: Sue Blundell

Environmetrics contact: Pete Wilson

Ref: 2398

English Australia
Level 3, 162 Goulburn St, Surry Hills NSW 2010
Tel: (02) 9264 4700
Fax: (02) 9264 4313
Email: easec@englishaustralia.com.au
Internet: www.englishaustralia.com.au
English Australia – acting for and on behalf of ELICOS Association Limited
ABN: 90 087 690 408

Environmetrics Pty Limited
Suite 402/144-148 Pacific Highway, North Sydney NSW 2060
Locked Bag 2116, North Sydney 2059
Tel: (02) 9954 0455
Fax: (02) 9954 9046
Email: pete@environmetrics.com.au
Internet: www.environmetrics.com.au
ABN 61 003 546 192

Australian Government
Australian Education International

AEI – The Australian Government International Education Network has provided financial support for the preparation of this survey.

Introduction

This is the eleventh 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 ninth undertaken by Environmetrics and covers enrolments for the 2006 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 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 fourth year, the Middle East.

Executive Summary

Total enrolments (all nationalities, individuals and group)

- Total ELICOS enrolment numbers for 2006 were 121,858, an increase of 21% from 2005 (101,087). A large part of the overall growth was in enrolments from South Korea.

- Asia remained the largest source of enrolments. It accounted for 77% of the total (slightly down from 2005). European enrolments accounted for 15%, and Central and South American for 8%.

- NSW accounted for 36% of all enrolments in 2006, followed by Queensland (31%), Victoria (18%), Western Australia (12%) and South Australia (3%). These figures show small declines in market share for NSW and SA, and small increases in market share for Victoria and WA when compared with 2005 figures.

- English Australia institutions accounted for 82% of total enrolments.

- Individual enrolments accounted for 88% of all enrolments (slightly up on 2005). Group enrolments accounted for 12% of the total (slightly down).

- Japan and South Korea were again the two major source nationalities in 2006, however South Korea has overtaken Japan as the most important source of ELICOS enrolments. South Korea again experienced the largest absolute increase in enrolment numbers (almost 5,000), and Colombia, Chile and Saudi Arabia the largest percentage increases in total enrolments (for countries with over 400 enrolments).

- Student visas were used by 49% of enrolees – the same as 2005. 30% held tourist visas in 2006, down from 37% in 2005. 21% held working holiday and other visas in 2006 - increasing from 14% in 2005.

- In line with increases in total enrolments, there was an increase in weeks spent studying. 2006 saw an increase from 1,142,016 to 1,333,872 (a 17% increase). The average number of weeks stayed decreased slightly from 11.3 to 10.9 weeks.

- With an increase in the number of students and weeks studied, there was also an increase in results for total spending. The total economic impact of all enrolments increased from $1,082 million in 2005 to $1,223 million (an increase of 16%).

- Asian nationalities again dominated group enrolments. Ninety nine percent of all group enrolments were Asian, with Japanese students making up 51% of these (slightly down from 2005).

Asia-Pacific region total enrolments (individuals and groups)

- Total numbers of enrolments for the Asia Pacific region increased from 81,189 in 2005 to 93,986 in 2006. This represents an increase of 16%.

- The largest increase in number of enrolments for an individual nationality was once again for South Korea (+4,829). All other nationalities experienced increases, except for Japan (5% decrease), and Indonesia (16% decrease). The largest percentage increases were for Vietnam (49%) and Taiwan (40%).

- South Korea eclipsed Japan for the first time as the dominant country in the Asia Pacific market, contributing 27% of the region's total enrolments (Japan down to 26% in 2006 compared with 32% in 2005).

- NSW accounted for 33% of all Asian enrolments in 2006, followed by Queensland (31%), Victoria (21%), Western Australia (11%) and South Australia (4%).

- The proportion of student visas was stable at 50%, with visitor visas decreasing to 26% and working holiday and other visas increasing to 23%.

- Total student weeks increased from 924,034 to 1,040,100 in 2006 (a 13% increase), while the average number of weeks spent studying decreased slightly (from 11.4 in 2005 to 11.1 in 2006).

- South Korea (29%) and China (20%) accounted for the largest number of student weeks in 2006.

- Students from the Asia Pacific region injected $948 million into the Australian economy in 2006, an increase of 7% on 2005.

- The number of groups from the region increased from 444 in 2005 to 593 in 2006 (an increase of 33%). However, the number of Asian students in groups decreased from 15,660 to 13,965.

- The average number of weeks for groups remained stable at 3.8 weeks.

European region (individuals and groups)

- The number of European enrolments increased by 32% in 2006 to 17,978.
- Decreases in enrolments came from Spain (3%) and Denmark (62%). All other nationalities experienced increases.
- As in previous years, Swiss enrolments made up a large proportion of the European market, accounting for 30% of all European enrolees, followed by French enrolments, with 16%.
- NSW accounted for 42% of all European enrolments in 2006, followed by Queensland (31%), Western Australia (21%), Victoria (5%), and South Australia (1%).
- The visa status of European enrolments changed slightly in 2006. 54% of European enrolees held visitor visas (similar to 2005), 28% were on student visas (down from 32% in 2005) and 18% on working holiday and other visas (up from 13% in 2005).
- The total number of weeks enrolled has increased from 2005 levels to 159,702 (an increase of 23%). The average number of weeks declined slightly from 9.5 in 2005 to 8.9 in 2006.
- European enrolees spent around $141 million in 2006 (up from $120 million in 2005).

Central and South American region (individuals and groups)

- There was an increase of 55% in total enrolments from the area (from 6,129 to 9,482).
- Brazil again yielded the largest number of enrolments, and experienced a 40% increase from 2005 (a total of 6,509 enrolments for 2006). Increases were seen for all Central and South American nationalities.
- NSW accounted for 41% of all Central and South American enrolments in 2006, followed by Queensland (38%), Victoria (11%), Western Australia (9%), and South Australia (1%).
- 75% of all Central and South American enrolees held student visas (up from 73% in 2004), with 18% arriving on visitor visas (down from 25% in 2005) and 6% arriving on working holiday and other visas (up from 2% in 2005).
- There has been a 51% increase in the total number of student weeks (132,119), and a slight decrease in the average number of student weeks (from 14.2 to 13.9).
- Total estimated spending of Central and South American enrolees was around $113 million compared with $76 million in 2005. This is an overall increase of 49% from 2005.

Middle Eastern Region (individuals and groups)

- Total enrolments for the Middle Eastern region in 2006 were 3,490, representing 56% growth over 2005 figures. The biggest contributors to this were Saudi Arabia (increase of 74%) and Turkey (increase of 36%).
- NSW accounted for 35% of all Middle Eastern enrolments, followed by Queensland (29%), Victoria (23%), Western Australia (10%) and South Australia (3%).
- 76% of all Middle Eastern enrolments held student visas, with 18% arriving on tourist visas and 6% on working holiday and other visas. A reasonably similar breakdown to 2005.
- The total number of student weeks for Middle Eastern enrolments was 61,117 (an increase of 61%), and the average number of student weeks was 17.5 (slightly up from 2005).
- The total estimated spending of Middle Eastern enrolees was around $56 million (up from $36 million in 2005).

ENGLISH AUSTRALIA