ENGLISH AUSTRALIA SURVEY OF MAJOR ELICOS REGIONAL MARKETS IN 2009

EXECUTIVE SUMMARY

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Executive Summary

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

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Introduction

This is the fourteenth 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 twelfth undertaken by Environmetrics and covers enrolments for the 2009 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 2009. 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 seventh year, the Middle East.

Executive Summary

- Total enrolments (all nationalities, individuals and groups)
- Total ELICOS enrolment numbers for 2009 were 155,614, a decrease of -4.0% compared with 2008 (162,114).
- Numbers of student visa holders increased by 4.4% (+4,371), however visitor visa numbers declined by -13% (-3,905) and working holiday & other visa numbers declined by -22% (-6,966).
- Student visas were used by 67% of enrolees – an increase on the 61% used in 2008. 18% held visitor visas in 2009, down from 2008 levels (19%). 16% held working holiday and other visas in 2009, down from 20% in 2008. Asian, Central & South American and Middle Eastern region enrolments were more likely to be on a student visa. European enrolments were more likely to have visitor (tourist) visa status.
- Numbers of students from Asia declined by -10%, however all other regions showed growth: Europe by 19%, Central & South America by 7% and the Middle East by 9%.

- The proportion of enrolments contributed by each region has therefore shifted slightly between 2008 and 2009. Asia remained the largest source of enrolments, accounting for 68% of the total (down from 73% in 2008). All other regions increased their share. Europe increased its share from 11% to 14%, Central & South America increased its share from 11% to 12% and the Middle East increased its share from 5% to 6%.
- Only NSW showed growth in enrolments (+2%). WA (-15% and –2,344 enrolments) and Queensland (-9% and –3,881 enrolments) showed the strongest % decline as well as the strongest decline in the number of students.
- NSW accounted for 41% of all enrolments in 2009, followed by Queensland (24%), Victoria (22%), Western Australia (9%) and South Australia (4%). These figures show NSW increasing its market share at the expense of Queensland and WA.
- Asia was the most important source region for all states. China is the most important source country for all states except Queensland. A significant decline from South Korea has meant that Japan has re-emerged as the most important source country for Queensland.
- The top ten source countries for 2009 were (in order): China, South Korea, Japan, India, Brazil, Thailand, Vietnam, Colombia, Saudi Arabia and Switzerland (returned to the top ten at the expense of Taiwan).
- China and South Korea were the two major source nationalities in 2009, with China consolidating its position as the number one source country for the second consecutive year since overtaking South Korea in 2008 and contributing 20% of all ELICOS enrolments.
- Forty four percent of all ELICOS enrolments in 2009 came from the top three source countries (a decline compared with 46% in 2008). Seventy seven percent came from the top ten source countries (a decline compared with 79% in 2008).
- Six of the top ten source countries for ELICOS showed increasing numbers. Korea (-19%), Japan (-13%), India (-29%) and Brazil (-5%) all showed decreasing numbers.
- The strongest growth in terms of student numbers came from Colombia, Vietnam, France, Saudi Arabia and China. The strongest decline in student numbers came from South Korea, India, Japan, Hong Kong and Brazil.
- In line with decreases in total enrolments, there was a decrease in weeks spent studying. 2009 saw a decrease from 2,024,632 to 1,958,311 weeks (-3.3% decrease).
- The average number of weeks studied increased slightly from 12.5 to 12.6 weeks. The average course length ranged from 4.4 weeks for Asian students on visitor visas, to 24.4 weeks for Middle Eastern students on student visas.

- With a decrease in the number of students and weeks studied, there was also a decrease in results for total spending. The total economic impact of all enrolments decreased from $1,884 million in 2008 to $1,828 million (a decrease of 3.0%).
- Individual enrolments accounted for 92.5% of all enrolments (slightly up on 2008). Group enrolments accounted for 7.5% of the total, continuing a decline in this form of enrolment.
- Asian nationalities again dominated group enrolments with 89% of the total (although this was a decline from 96% in 2008). Japanese students made up 44% of these (slightly up from 42% in 2008).
- English Australia institutions accounted for 83% of total enrolments.

Asia-Pacific region total enrolments (individuals and groups)

- Total numbers of enrolments for the Asia Pacific region decreased from 117,834 in 2008 to 105,792 in 2009. This represents a decrease of -10%.
- The largest increase in the number of enrolments for an individual nationality was shown by Vietnam (1,079), followed by China (880) and then Thailand (514).
- The largest decrease in the number of enrolments for an individual nationality was shown by South Korea (-5,029), followed by India (-4,335) and then Japan (-2,389).
- For the second consecutive year China was the most important source country in the Asia Pacific region, contributing 29% of the region's total enrolments. South Korea was in second place with 20%. Japan has continued to decline though has still remained in third place with 15% of Asian enrolments.
- NSW accounted for 39% of all Asian enrolments in 2009, followed by Victoria (27%), Queensland (22%), Western Australia (7%) and South Australia (5%).
- The proportion of student visas increased to 69%, with visitor visas decreasing to 15% and working holiday & other visas decreasing to 16%.
- Total student weeks decreased from 1,402,012 to 1,272,539 in 2009 (a -9% decrease), while the average number of weeks spent studying increased slightly (from 11.9 in 2008 to 12.0 in 2009).
- China (32%) and South Korea (18%) accounted for the largest number of student weeks in 2009.
- Total estimated spending of enrolees from the Asia Pacific region was $1,191 million compared with $1,321 million in 2008. This is an overall decrease of 10% from 2008.
- The number of Asian students in groups decreased from 13,463 to 10,310. The average number of weeks for groups increased from 3.7 to 4.7 weeks.

European region (individuals and groups)

- Total numbers of enrolments from Europe increased from 17,733 in 2008 to 21,070 in 2009. This represents an increase of 19%.
- The largest increase in the number of enrolments for an individual nationality was shown by France (1,074), followed by Switzerland (472) and then Germany (401). No European country showed a significant decline in enrolments.
- As in previous years Swiss enrolments made up a large proportion of the European market, accounting for 22% (though declining from 24% in 2008) of all European enrolees, followed by French enrolments, with 19%.
- The state market share has changed for Europe in 2009, with NSW growing at the expense of other states. NSW accounted for 49% of all European enrolments in 2009 (44% in 2008), whilst Queensland's share has dropped from 34% in 2008 to 32% in 2009, Western Australia's from 15% to 13%, Victoria from 6% to 5% and South Australia from 2% to 1%.
- The visa status of European enrolments changed in 2009. Visitor visas are still the most popular choice for European enrolees, but have dropped to 41% from 44% in 2008 and 51% in 2007). The proportion of working holiday and other visas has increased slightly to 26% (up from 25% in 2008 and 16% in 2007) as have numbers of student visas, increasing to 33% (up from 31% in 2008).
- The total number of weeks enrolled has increased from 153,875 in 2008 to 184,996 in 2009 (an increase of 17% in line with student enrolments). The average number of weeks in a course remained stable at 8.8.
- Total estimated spending of European enrolees was $155.1 million compared with $131 million in 2008. This is an overall increase of 18% from 2008.

Central and South American region (individuals and groups)

- The Central and South American region continued to grow in 2009 as it has done since 2004, however the level of growth has slowed. There was an increase of 7% in total enrolments from the area (from 17,472 to 18,702).
- Brazil again yielded the largest number of enrolments, representing 53% of all enrolments from this region, however experienced a small decline of 5% from 2008 numbers (a total of 9,983 enrolments for 2009). The second most important source country, Colombia, experienced a solid increase (25%) in enrolments. Increases were seen for all Central and South American nationalities except Brazil.
- NSW accounted for 41% of all Central and South American enrolments in 2009 (39% in 2008), whilst Queensland's share has dropped from 36% in 2008 to 33% in 2009, Western Australia's dropped from 12% to 11%, whilst Victoria's grew from 12% to 13% and South Australia grew from 1% to 2%.

- 82% of all Central and South American enrolees held student visas (down from 76% in 2008), with 10% arriving on visitor visas (up from 9% in 2008) and 8% arriving on working holiday and other visas (down from 16% in 2008).
- There has been an 8% increase in the total number of student weeks (from 261,589 to 282,616), with the average number of student weeks remaining stable at 15.1 weeks.
- Total estimated spending of Central and South American enrolees was $242.6 million compared with $225.8 million in 2008. This is an overall increase of 7% from 2008.

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 2009 were 9,173, representing 9% growth over the 2008 figures of 8,413.
- Saudi Arabia contributes 59% of all enrolments from the Middle East.
- The largest Middle Eastern contributors were Saudi Arabia (increase of 20%) Turkey (increase of 18%) and Emirates (increase of 16%).
- NSW share remained stable with 39% of all Middle Eastern enrolments in 2009 (39% in 2008), whilst Queensland's share grew from 18% in 2008 to 23% in 2009 and South Australia grew from 4% to 5%. Victoria's share dropped from 28% to 26% and Western Australia's share dropped from 12% to 7%.
- 86% of all Middle Eastern enrolments held student visas, up from 80% in 2008. The proportion of visitor visas declined to 6% (down from 8%) and working holiday and other visas declined to 8% (down from 12%).
- The total number of student weeks for Middle Eastern enrolments was 207,666 (an increase of 4%), and the average number of student weeks was 22.6 (down from 23.7 in 2008).
- The total estimated spending of Middle Eastern enrolees was $228.6 million (up from $199.3 million in 2008). This is an overall increase of 15% on 2008.

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