

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

IN 2007

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Survey of major regional markets for ELICOS institutions in 2007

Executive Summary

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

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Introduction

This is the twelfth 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 tenth undertaken by Environmetrics and covers enrolments for the 2007 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 2007. 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 fifth year, the Middle East.

Executive Summary

Total enrolments (all nationalities, individuals and groups)

- Total ELICOS enrolment numbers for 2007 were 137,019, an increase of 12% from 2006 (121,858). A large part of the overall growth was in enrolments from China and India.
- Asia remained the largest source of enrolments. It accounted for 78% of the total (slightly up from 2006). European enrolments accounted for 13%, and Central and South American for 9%.
- NSW accounted for 39% of all enrolments in 2007, followed by Queensland (26%), Victoria (21%), Western Australia (10%) and South Australia (4%). These figures show increases in market share for NSW, Victoria and South Australia, and decreases for Queensland and Western Australia.
- English Australia institutions accounted for 88% of total enrolments (up from 82% in 2006).
- Individual enrolments accounted for 90% of all enrolments (slightly up on 2006). Group enrolments accounted for 10% of the total (slightly down).
- South Korea and China were the two major source nationalities in 2007. Japan, though still strong, has dropped to third with decreasing enrolments. China experienced the largest absolute increase in enrolment numbers (6,342) followed closely by India (5,762). India also had the highest percentage increase (201%).
- Three of the top ten source countries for ELICOS show declining numbers: Japan (-13%), Switzerland (-19%) and Taiwan (-17%).
- Student visas were used by 59% of enrollees – an increase on the 49% used in 2006. 27% held tourist visas in 2007, down slightly from 2006 levels (30%). 14% held working holiday and other visas in 2007, decreasing from 21% in 2006.
- In line with increases in total enrolments, there was an increase in weeks spent studying. 2007 saw an increase from 1,333,872 to 1,661,862 weeks (a 25% increase). The average number of weeks studied increased from 10.9 to 12.0 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 \$1,205 million in 2006 to \$1,515 million (an increase of 26%).
- Asian nationalities again dominated group enrolments. Ninety seven percent of all group enrolments were Asian, with Japanese students making up 50% of these (slightly down from 2006).

Asia-Pacific region total enrolments (individuals and groups)

- Total numbers of enrolments for the Asia Pacific region increased from 93,986 in 2006 to 107,019 in 2007. This represents an increase of 14%.
- The largest increase in the number of enrolments for an individual nationality was shown by China (6,342), though India also had a strong increase in enrolments (201%). Most nationalities experienced increases except for Japan (13% decrease), Taiwan (17% decrease) and Hong Kong (28% decrease).
- South Korea remained the dominant country in the Asia Pacific market, contributing 24% of the region's total enrolments though China now comes a close second contributing 23% of enrolments. Japan has dropped to third place with 20% of enrolments.
- NSW accounted for 37% of all Asian enrolments in 2007, followed by Queensland (26%), Victoria (24%), Western Australia (8%) and South Australia (5%).
- The proportion of student visas increased to 61%, with visitor visas decreasing to 24% and working holiday and other visas decreasing to 15%.
- Total student weeks increased from 1,040,100 to 1,323,820 in 2007 (a 27% increase), while the average number of weeks spent studying also increased (from 11.1 in 2006 to 12.0 in 2007).
- South Korea (25%) and China (24%) accounted for the largest number of student weeks in 2007.
- Students from the Asia Pacific region injected \$1,214 million into the Australian economy in 2007, an increase of 28% on 2006.
- The number of groups from the region decreased from 593 in 2006 to 387 in 2007 (a decrease of 35%). The number of Asian students in groups decreased from 13,965 to 13,270.
- The average number of weeks for groups increased from 3.8 to 4.7 weeks.

European region (individuals and groups)

- The number of European enrolments decreased by 4% in 2007 to 17,215.
- Decreases were seen in key countries, Switzerland (19% decrease on 2006) and France (13% decrease). Belgium (18%), Sweden (37%) and Austria (54%) also decreased.
- Increases were seen in other countries but, given the small numbers, contributed little to boost European figures.
- As in previous years Swiss enrolments made up a large proportion of the European market, accounting for 26% (though declining from 30% in 2006) of all European enrollees, followed by French enrolments, with 15%.
- NSW accounted for 49% of all European enrolments in 2007, followed by Queensland (25%), Western Australia (19%), Victoria (6%), and South Australia (1%).
- The visa status of European enrolments changed slightly in 2007. 51% of European enrollees held visitor visas (dropping slightly from 54% in 2006), 33% were on student visas (up from 28% in 2006) and 16% on working holiday and other visas (down from 18%).
- The total number of weeks enrolled has decreased from 2006 levels to 149,328 (a decrease of 6%). The average number of weeks declined slightly from 8.9 in 2006 to 8.7 in 2007.
- European enrollees spent around \$133 million in 2007 (down from \$141 million in 2006).

Central and South American region (individuals and groups)

- There was an increase of 30% in total enrolments from the area (from 9,482 to 12,359).
- Brazil again yielded the largest number of enrolments, and experienced a 15% increase from 2006 (a total of 7,513 enrolments for 2007). The second most important source country, Colombia, experienced a strong increase (89%) in enrolments. Increases were seen for all Central and South American nationalities except Ecuador and 'other'.
- NSW accounted for 44% of all Central and South American enrolments in 2007, followed by Queensland (32%), Victoria (12%), Western Australia (11%) and South Australia (1%).
- 81% of all Central and South American enrollees held student visas (up from 75% in 2006), with 16% arriving on visitor visas (down from 18% in 2006) and 3% arriving on working holiday and other visas (down from 6% in 2006).
- There has been a 40% increase in the total number of student weeks (185,366), and an increase in the average number of student weeks (from 13.9 to 15.0).
- Total estimated spending of Central and South American enrollees was \$164.7 million compared with \$108.3 million in 2006. This is an overall increase of 52% from 2006.

Middle Eastern Region (individuals and groups)

- Total enrolments for the Middle Eastern region in 2007 were 5,556, representing 59% growth over 2006 figures. The biggest contributors to this were Saudi Arabia (increase of 99%) and Turkey (increase of 54%).
- NSW accounted for 46% of all Middle Eastern enrolments, followed by Victoria (23%), Queensland (20%), Western Australia (9%) and South Australia (2%).
- 84% of all Middle Eastern enrolments held student visas, up from 76% in 2006. 13% (down from 18%) arrived on tourist visas and 3% (down from 6%) on working holiday and other visas.
- The total number of student weeks for Middle Eastern enrolments was 110,651 (an increase of 81%), and the average number of student weeks was 20 (up from 17.5 in 2006).
- The total estimated spending of Middle Eastern enrollees was \$98 million (up from \$64 million in 2006).

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