

**ENGLISH AUSTRALIA SURVEY OF  
MAJOR ELICOS REGIONAL MARKETS  
IN 2004**

**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 regional markets for ELICOS institutions in 2004

## Executive Summary

of a report prepared for English Australia by Environmetrics

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**English Australia contact:** Sue Blundell

**Environmetrics contact:** Pete Wilson

**Ref: 2041**

**English Australia**

Level 3, 162 Goulburn St, Surry Hills NSW, 2010

Tel: (02) 9264 4700

Fax: (02) 9264 4313

Email: [easec@englishaustralia.com.au](mailto:easec@englishaustralia.com.au)

Internet: [www.englishaustralia.com.au](http://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 NSW, 2059

Tel: (02) 9954 0455

Fax: (02) 9954 9046

Email: [pete@environmetrics.com.au](mailto:pete@environmetrics.com.au)

Internet: [www.environmetrics.com.au](http://www.environmetrics.com.au)

ABN: 61 003 546 192



**Australian Government**

**AEI - International Education Network**

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## Introduction

This is the ninth 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, the seventh undertaken by Environmetrics, covers enrolments for the 2004 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 2004. 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 second year, the Middle East.

## Executive Summary

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

- Total ELICOS enrolment numbers for 2004 were 91,129, an increase of 16% from 2003 (78,338). A large part of the overall growth was in group enrolments from Japan.
- Asia remained the largest source of enrolments. It accounted for 84% of the total. European enrolments accounted for 12%, and Central and South American for 4%.
- NSW accounted for 39% of all enrolments in 2004, followed by Queensland (28%), Victoria (17%), Western Australia (12%) and South Australia (4%). These figures represent considerable changes in market share from the 2003 figures where NSW accounted for 45% of all enrolments, followed by Queensland (23%), Victoria (19%), Western Australia (9%) and South Australia (4%).
- English Australia institutions accounted for 84% of total enrolments.
- Individual enrolments accounted for 82% of all enrolments. Group enrolments grew as a percentage of the total from 9% in 2003 to 18% in 2004.
- Japan and South Korea were again the two major source nationalities in 2004. Japan and South Korea experienced the largest absolute increases in enrolment numbers (over 5,000 [primarily group enrolments] and over 2,000 respectively), and Chile and Lebanon the largest percentage increases in total enrolments (184% and 79% respectively, although these figures are based on small sample sizes and should be treated with some caution).
- Student visas were used by 51% of enrolees - a decrease from 2003 (58%), however a return to the level experienced in previous years. 38% held tourist visas in 2004, an increase from 31% in 2003. 11% held working holiday and other visas in 2004, remaining at the highest recorded level.
- In line with increases in total enrolments, there was an increase in weeks spent studying. 2004 saw an increase from 946,241 to 995,918 weeks (a 5% increase). This increase was not as strong as the 16% increase in student numbers, with the growth taking place primarily among short-stay visitor visa holders. The average number of weeks spent studying decreased from 12.1 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 \$849 million in 2003 to \$932 million in 2004 (an increase of 10%).
- Asian nationalities again dominated group enrolments. Ninety nine percent of all group enrolments were Asian, with Japanese students making up 52% of these.

### Asia-Pacific region (individuals and groups)

- Total numbers of enrolments for the Asia Pacific region increased from 65,671 in 2003 to 76,029 in 2004. This represents an increase of 16%.
- The most dramatic increase in enrolments for an individual nationality was 68% for Vietnam (following 4 consecutive years of declining numbers). All other nationalities experienced increases, except for China (0.3% decrease) and Indonesia (8% decrease).
- Japan continued to dominate the Asia Pacific market, contributing 34% of the region's total enrolments (cf. 32% in 2003) and a large proportion of the increase in enrolments.
- NSW accounted for 37% of all Asian enrolments in 2004, followed by Queensland (27%), Victoria (19%), Western Australia (12%) and South Australia (5%).
- The proportion of student visas decreased from 61% to 52%, with working holiday and other visas remaining stable from 2003 to 2004. The proportion of visitor visas increased from 27% to 36% in 2004.
- Total student weeks increased from 820,291 in 2003 to 841,012 in 2004 (a 3% increase), while the average number of weeks spent studying decreased (from 12.5 in 2003 to 11.1 in 2004).
- Japan (26%), South Korea (24%), and China (20%) accounted for the largest number of student weeks in 2004.
- Students from the Asia Pacific region injected \$786 million into the Australian economy in 2004, an increase of 7% on 2003.
- The number of groups from the region increased from 280 in 2003 to 649 in 2004 (an increase of 132%). The number of Asian students in groups increased in line with this, from 6,706 to 16,111.
- The average number of weeks for groups decreased from 3.8 in 2003 to 3.0 in 2004.

### European region (individuals and groups)

- The number of European enrolments increased by 13% in 2004 to 11,334.
- Decreases in enrolments came from Germany (27%), Slovakia (2%) and Russia (16%). All other nationalities experienced increases.
- As in previous years, Swiss enrolments made up a large proportion of the European market, accounting for 31% of all European enrollees, followed by German enrolments, with 14%.
- NSW accounted for 51% of all European enrolments in 2004, followed by Queensland (25%), Western Australia (18%), Victoria (5%), and South Australia (1%).

- The visa status of European enrolments was similar to that of 2003. 56% of European enrollees held visitor visas (down from 58%), 35% were on student visas and 9% on working holiday and other visas (up from 7%).
- The total number of weeks enrolled has increased from 2003 levels to 108,785 (an increase of 17%). The average number of weeks increased from 9.3 to 9.6 in 2004.
- European enrollees spent around \$104 million (up from \$85 million in 2003).

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

- There was an increase of 45% in total enrolments from the area (from 2,545 to 3,692).
- Brazil again yielded the largest number of enrolments, and experienced an 80% increase from 2003 (a total of 2,789 enrolments for 2004). Decreases were seen for all Central and South American enrolments except for Brazilian, Chilean and Argentinean.
- NSW accounted for 48% of all Central and South American enrolments in 2004, followed by Queensland (36%), Victoria (8%), Western Australia (7%), and South Australia (1%).
- 70% of all Central and South American enrollees held student visas (down from 71% in 2003), with 27% arriving on visitor visas, and 2% arriving on working holiday and other visas.
- There has been a 41% increase in the total number of student weeks (45,164), but a decrease in the average number of student weeks (from 12.5 to 12.2).
- Total estimated spending of Central and South American enrollees was around \$40 million compared with \$30 million in 2003. This is an overall increase of 39% from 2003.

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

- Total enrolments for the Middle Eastern region in 2004 were 1,482, representing 1% growth over 2003 figures. The biggest contributors to this were Saudi-Arabia (22%) and Turkey (16%).
- NSW accounted for 34% of all Middle Eastern enrolments, followed by Victoria (25%), Queensland (25%), Western Australia (14%) and South Australia (2%).
- 82% of all Middle Eastern enrolments held student visas, with 15% arriving on tourist visas and 3% on working holiday and other visas.
- The total number of student weeks for Middle Eastern enrolments was 25,700, and the average number of student weeks was 17.3.
- The total estimated spending of Middle Eastern enrollees was around \$23 million.

Level 3  
162 Goulburn Street  
Surry Hills NSW 2010 Australia  
PO Box 1437  
Darlinghurst NSW 1300

Tel: +61 2 9264 4700  
Fax: +61 2 9264 4313

Email: [easec@englishaustralia.com.au](mailto:easec@englishaustralia.com.au)  
Internet: [www.englishaustralia.com.au](http://www.englishaustralia.com.au)

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