Submissions
The Australia in the Asian Century Task Force
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AUSTRALIA IN THE ASIAN CENTURY

Submission by **ENGLISH AUSTRALIA**

English Australia – leading, supporting and representing the international English language industry in Australia

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English Australia Pty Ltd acting for and on behalf of ELICOS Association Ltd.

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Background

The scale and pace of Asia's transformation is unprecedented and the implications for Australia are profound. The Australian Government has commissioned a White Paper on Australia in the Asian Century to consider the likely economic and strategic changes in the region and what more can be done to position Australia for the Asian Century.

Interested people and organisations were invited to make a written submission to the Australia in the Asian Century White Paper by 26 February 2012. To assist in the preparation of submissions, the Advisory Panel released an Issues Paper that outlines broad issues and asks questions to prompt further discussion.

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Executive Summary

English Australia welcomes this opportunity to provide input to the White Paper on Australia in the Asian Century.

English Australia notes the discussion points on community engagement:

- *What form of consultation should the White Paper task force undertake to maximise the quality of its analysis and policy advice?*
- *What are effective ways to promote an ongoing national conversation about Australia's engagement with Asia beyond the White Paper process?*

English Australia believes that education provides Australia with a significant platform for engagement with Asia at a range of levels, and that as such, specific consultation should be undertaken with all sectors of education, including the English language sector as a key stakeholder.

English Australia makes the following recommendations:

Recommendation 1: English Australia recommends that specific consultations be undertaken with all sectors of education.

Recommendation 2: English Australia recommends that the Australian government expand its working holiday program.

Recommendation 3: English Australia recommends that the ABS be funded to provide improved data regarding the international education/tourism interface.

Recommendation 4: English Australia recommends that a study be undertaken to scope the extent and contribution of the non-student visa language and study tourism sector.

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English Australia Comments on the Issues Paper

English Australia is the peak body for the **English language sector of international education**, representing more than 100 colleges that teach English to overseas students, an essential element of Australia's international education program and the introduction to Australia for most non-English speaking students from Asia.

The governments of many of Australia's neighbouring countries in Asia have three, five or eight year education plans, all of which include English language skills as a key factor in their ability to build and globalise the capacity of their populations. Australia is in an ideal position to take advantage of the fact that it is an English speaking country and to engage with these countries in providing support in building the English language skills of their citizens.

In addition, the Association of Southeast Asian Nations (ASEAN) has a significant focus on education as a key component of its development plan.

> *"Education underpins ASEAN community building. Education lies at the core of ASEAN's development process, creating a knowledge-based society and contributing to the enhancement of ASEAN competitiveness."*[1]

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- *What form of consultation should the White Paper task force undertake to maximise the quality of its analysis and policy advice?*
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Recommendation 1: English Australia recommends that specific consultations be undertaken with all sectors of education.

Submissions from other sectors of education will no doubt address the broad range of benefits to Australia of strong education links with Asia. English Australia would like to take a particular focus in this submission on the English language sector in particular; the role it plays in straddling formal study and tourism and the opportunities that this presents to increase cross-cultural understanding and build bonds between young people across the region. The Issues Paper notes that *"A web of interpersonal connections is bringing people in Asia closer together. But other forces, such as nationalism, often linked to historical and cultural frictions, challenge this trend."* Opportunities to travel between countries and engage in educational and social activities

[1] http://www.aseansec.org/19600.htm

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that bring young people from the region together can play a key role bringing down some of the barriers to understanding that exist.

The key question in the Issues Paper for English Australia is *"What does the Asian Century mean for Australia?"*.

Quantitatively the importance of Asia to the English language sector can be seen from the following key points from the most recent 'Survey of Major ELICOS Regional Markets in 2010' published by English Australia with assistance from Australian Education International (DIISRTE):

- Asia is the largest source of enrolments accounting for 65% of the total.
- Asia is the most important source region for all Australian states.
- The top ten source countries for 2010 were, in order: China, South Korea, Japan, Brazil, Thailand, Taiwan, Switzerland, Colombia, Saudi Arabia and France.
- China was the major source country for the third consecutive year.
- The top three source countries (China, South Korea and Japan) contribute 47% of all enrolments.

As the statistics indicate, Asia is vital to the English language training sector and international education as a whole. Without the influx of students from Asia over the last 25 years, the dynamic growth of Australia's international education industry would not have achieved the critical mass which has enabled it to become Australia's largest service export industry.

Further breakdowns from the ELICOS Regional Markets Survey are included later in this submission in response to the specific 'Country Snapshots' discussion points raised in the Issues Paper.

Qualitatively English Australia can contribute to *The Australian Economy* section, specifically to the following points made in the Issues Paper:

> *"Australia's success in Asian markets is not guaranteed. Australia will face competition for the opportunities arising in Asia. Our task is to reinforce our strengths, while also expanding our areas of comparative advantage in new sectors and markets. We will need to adapt and innovate, which in some cases will require a change in mindset as well as building new skills and capabilities."*

English Australia can also contribute to the *Australian Society and Culture* section, specifically:

> *"The increasing diversity and mobility of the region's population, growing business and political engagement, globalisation and technological developments, as well as growth in international education and in-bound tourism from Asia, have opened up new opportunities for social, cultural, scientific, sports and other forms of people-to-people exchange……..While some Australians and counterparts in the region are making the most of these opportunities, there is much work to be done to extend and deepen such people-to-people connections."*

These statements in the Issues Paper resonate strongly with the English language training sector in view both of the strong growth up to 2008 when there were more than 162,000 overseas students being taught English in Australia and of the subsequent decline to 140,000 students in 2010 with the market still falling and yet to

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bottom out. As the members of English Australia are the front line of Australian international education, they know from first-hand experience the opportunities and pitfalls of Asian markets and the importance of people-to-people contact.

The *Australia in the Asian Century* White Paper process provides a valuable opportunity to consider the threats and opportunities Asia presents not constrained by the 'silos' of recent international education reviews. Although both the Review of the Education Services for Overseas Students Act (ESOS Act) by the Hon Bruce Baird and the inquiry into the Student Visa Program by the Hon Michael Knight were necessary and generally welcomed by provider groups, their terms of reference were confined to certain aspects, not the totality of international education.

English language training (ELT) in Australia is both an integral and essential part of Australian international education and part of a global ELT industry (see **Appendix A**). Because of this distinct identity English Australia believes it has a worthwhile contribution to make to the *Australia in the Asian Century* White Paper process. The dual nature of ELT or the ELICOS[2] sector is described succinctly by the inaugural Chair of English Australia, Christine Bundesen, in her chapter in the recently published *"Making A Difference: Australian International Education":*

> *"There are two distinct facets to the ELICOS sector. It acts as a feeder to the other Australian education sectors, preparing students with the language skills needed to be successful in further study. It also attracts large numbers for English-only studies for study-tourism, career progression, professional purposes, migration or work purposes in Australia, and/or as a pathway to further studies either in home countries and/or third countries." (page 153)*

As evidenced by that brief summary, to operate successfully English Australia member colleges have to navigate within and between a number of official and non-official silos:

> Government: Legislative responsibility (Education portfolio), visa policy (Immigration) and marketing (Austrade).
>
> Regulation: Currently in a state of flux between State and Territory Governments and newly created national regulatory bodies ASQA and TEQSA with specific responsibility for ELICOS yet to be clarified.
>
> Industry: Further study students (international education industry), stand alone English (tourism/language travel industry).

Despite these barriers, Australia's English language colleges have been innovative in developing new markets both geographically and in terms of different student cohorts so that the ELICOS sector is significantly diversified. This provides some protection from the inevitable rapid changes in market conditions in

[2] English Language Intensive Courses for Overseas Students

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international trade in services such as currency fluctuations and political crises (eg Libyan students most recently).

Although both the Baird and Knight reviews remain works in progress, the Government is undertaking much-needed reform by both introducing risk assessment criteria and removing some of the restrictions in the Student Visa Program. In relation to the latter, the Government's adoption of the Knight Review recommendation to remove the historical anomaly which required students from high risk countries to have English language skills before they could come to Australia to study English represents a major micro-economic reform for the ELICOS sector.

In view of the foregoing English Australia confidently asserts that the most fruitful area for further reform for the ELICOS sector is in English-only studies. Both the tourism and international education industries see growth potential here particularly for working holiday-makers. As the populations of Asian countries become wealthier and travel more the potential to attract them here for working holidays increases dovetailing with the aspirations for Australia expressed in the Issues Paper.

Recommendation 2: English Australia recommends that the Australian government expand its working holiday program.

English Australia's specific recommendation is in line with that of the Australian Tourism Export Council (ATEC) to expand and recast the Working Holiday Visa Program by permitting multiple visa applications, increasing the allowable age range from 18 to 30 to 35 years, reducing the costs and financial requirements of applying for the program and opening up the program to more countries.

Figure 134: Visa status of total Asian enrolments by country 2010 (percentage) included in Appendix B to this submission shows that working holiday-makers comprised 15% of ELICOS students from the Asia-Pacific Region in 2010, and that these nearly all came from South Korea, Japan and Taiwan. This demonstrates the potential for growth in the working holiday-maker market from other Asian countries in the context of likely economic development over the Asian Century.

The recent focus on the Student Visa Program has been necessary and commendable. However in terms of the objective of preparing Australia for the challenge of the Asian Century it is necessary to look beyond the university, college and school experience to the visitor, tourist and particularly working holiday experience. As Andrew Low, an experienced Australian Asia-Pacific business advisor, wrote in the Sydney Morning Herald on 30 January 2012:

> *"There are more than 150,000 students in Australian universities and high schools who grew up in Asia. They could be language teachers, cultural interlocutors and future ambassadors for Australia, but too many pass through our universities as if in a parallel universe. They often return to their home countries without an Australian network of friends and experiences."*

This is not the case with the Working Holiday Visa Program which was created in order to provide a bridge and to educate young people to other world cultures. Extending the Program as recommended will develop deeper cultural understanding and exchange for young people visiting Australia. Tourism related jobs in particular provide significant opportunities for interaction and cultural exchange and tourism is heralded by the United National World Tourism Organisation as key to bridging cultures and fostering better understanding and appreciation of foreign peoples, their customs and practices.

The particular reason for recommending expansion of the Working Holiday Visa Program at this stage is that it provides a counterweight to the impact of the high Australian dollar. In addition, English Australia sees short term potential for expanding this category of visitor from Asian countries who are likely to require English language training. In terms of the Asian century, similar consideration should be given to all categories of visitor as referred to in Recommendation 4 of this paper. The pattern of enrolments in all but the most recent years suggests there is considerable scope for growth in non-student visa holders.

In terms of competition, both the Australian education and tourism industries are aware that Canada has attracted an increasing number of working holiday-makers at Australia's expense by increasing the age limit for their scheme. While the Canadians are aiming at the Northern Hemisphere 'mid-career gap' market, English Australia members would target the increasingly affluent market in Asian countries.

Recommendation 3: English Australia recommends that the ABS be funded to provide improved data regarding the international education/tourism interface.

English Australia's specific recommendation is that the Australian Bureau of Statistics be funded to expand its data collection and reporting in trade in services generally and in particular to provide a consistent annual data set for the international education/tourism interface for the use of policy makers and the respective industries which are Australia's two largest service exports.

The lack of a standardised set of statistics and even terminology was recognised by the House of Representatives Economics Standing Committee in its Report on Trade in Services in 2007. At the time the Committee was chaired by the Hon Bruce Baird and the Deputy Chair was the current Minister for Trade, the Hon Craig Emerson.

The extent of the cross-over is easily ascertained from the latest Tourism Research Australia's State of the Industry 2011 Report in which 'education travel' is cited as the biggest contribution to tourism exports despite the recent declines.

> *"Growth in the biggest contributor to tourism exports, education travel, has moderated. This sector has contributed around 45% growth in tourism export earnings over the 1999-00 to 2010-11 period. More concerning is the slight decline in education visitor arrivals so far in 2011, after rising strongly in recent years, which will impact on expenditure growth in the short term." (page 23)*

There is some co-operation and cross-fertilisation between the two industries but it is ad hoc. For instance, the Executive Director of English Australia is a member of the Australian Tourism Export Council's Backpacker Youth Tourism Advisory Panel's Policy Group.

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There is clearly scope for more co-operation starting with a common data set as both industries cater to young people visiting Australia particularly from Asia for the purposes of 'study tourism' or 'education travel' depending on who is counting, but they are the same people.

Recommendation 4: English Australia recommends that a study be undertaken to scope the extent and contribution of the non-student visa language and study tourism sector.

In his Introduction to the publication *'Making a Difference: Australian International Education'* – Global Context: Student Mobility and the Shifting Dynamics of Internationalisation – Professor Fazal Rivzi, Pro-Vice Chancellor (International), RMIT, wrote:

> *"It is increasingly clear that the global context within which student mobility takes place is now characterised by multiple ties and interactions linking people and institutions across the borders of nation-states." (page 8)*

While this is encouraging for a country with a developed international education program such as Australia, Professor Rivzi also warns that:

> *"This new transnational context of education can no longer assume asymmetrical power relations that had in the past resulted in a unidirectional flow of students from the rest to the West".*

As stated previously member colleges of English Australia have provided themselves with a buffer against the ups and downs of being in an industry exposed to international fluctuations and events by diversification into language travel and study tourism. This is a little understood and significantly undervalued segment of both the education and tourism export industries and requires a whole of government approach to understanding its scope and contribution so that a more strategic and structured approach to maximising the opportunities for Australia can be developed and implemente.

For the reasons outlined in this submission, English Australia asserts that the education, tourism and cultural imperatives of the Asian century merit an independent review into the opportunities for and threats to study tourism/education travel.

Appendices

Appendix A.	English Australia Fact Sheet: Global Language Travel
Appendix B.	Extract from English Australia Survey of Major ELICOS Regional Markets – Asia Pacific Region
Appendix C.	Extract from English Australia Survey of Major ELICOS Regional Markets – China
Appendix D.	Extract from English Australia Survey of Major ELICOS Regional Markets – South Korea
Appendix E.	Extract from English Australia Survey of Major ELICOS Regional Markets – Japan

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About English Australia & the ELICOS Sector

- English Australia, formerly known as the ELICOS Association, is the national peak body and industry association for the English Language Intensive Courses for Overseas Students (ELICOS) sector. English Australia was established in the early 1980's and incorporated in 1990.
- English Australia represents over 100 member colleges, with over 130 registered centres across Australia. Over 80% of international students learning English in Australia choose to study with an English Australia member college.
- English Australia has both public sector (eg. attached to a university or TAFE) and independent language centres amongst its membership.
- Currently international education is Australia's third largest source of export income, with the ELICOS sector accounting for about ten per cent, over $1.5 billion per annum out of a total of more than $16 billion for international education as a whole.
- The ELICOS sector peaked in 2008 with 162,114 students across all visa types, falling to 140,102 in 2010.
- In 2010, 83,583 overseas students holding student visas in Australia undertook English language courses (83,583 students). In addition a further 56,519 overseas students undertook English language courses using other visas, primarily Visitor or Working Holiday visas.

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[submission authorised by the Council of English Australia]

English Australia
Global Language Travel

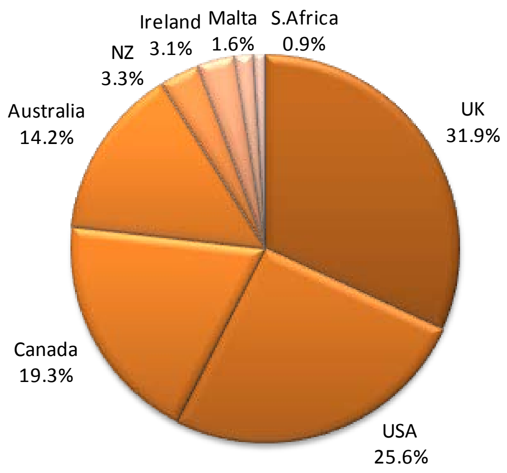
The only source of data that compares the performance of destination countries for English language training is *Study Travel Magazine*, a publication of Hothouse Media (based in the UK). Every year the publication researches a report which attempts to assess the global picture for ELT exports. The latest report is for **2010**, with 2011 information becoming available in November 2012.

The motivations for travelling overseas to learn English are many and varied. English language students may want to continue studying at an English medium high school, vocational college or university; travel or work in an English speaking country; gain a qualification that gives them entry to improved work or study options at home or better access to cultures where English is the lingua franca.

An estimated **1,423,379** international students travelled to an English speaking country to learn English in 2010, a decline of **-3.1%** from the 1,469,171 who studied in 2009. The number of weeks studied showed an even stronger decline of **-6.2%**, from 12,489,626 to 11,717,450. This makes three consecutive years of decline for the global ELT industry, which peaked in 2007 with 1,519,376 students.

English language travel generated expenditure of over **US$10.5 billion** in 2010.

The UK has the greatest market share in relation to the number of student weeks. **Australia is in fourth place** after the UK, USA and Canada.
The UK, Canada and Malta gained market share in 2010 at the expense of all other countries.
The five years to 2008 saw **Australia** increasing its share of the global market from 8.8% in 2003 to a peak of 16.6% of student weeks in 2008; however this share has declined over the last two years to **14.2% in 2010**.
The top 4 countries now receive 91% of student weeks, with the share of the other 4 destinations dwindling in comparison.



2003	2004	2005	2006	2007	2008	2009	2010
UK 40.6	UK 43.6	UK 43.9	UK 30.7	UK 29.8	UK 29.7	UK 29.4	UK 31.9
USA 19.2	USA 18.8	USA 18.2	USA 23.9	USA 22.9	USA 24.2	USA 27.1	USA 25.6
Canada 16.2	Canada 15.3	Canada 15.2	Canada 16.7	Canada 17.3	Canada 17.6	Canada 19.0	Canada 19.3
Australia 8.8	Australia 10.4	Australia 10.7	Australia 13.3	Australia 14.4	Australia 16.6	Australia 15.7	Australia 14.2
Ireland 7.4	NZ 6.3	Ireland 6.4	Ireland 8.4	Ireland 8.9	Ireland 5.1	NZ 3.7	NZ 3.3
NZ 5.7	Ireland 3.1	NZ 3.4	NZ 3.6	NZ 3.5	NZ 3.8	Ireland 2.5	Ireland 3.1
Malta 1.3	Malta 1.7	Malta 1.4	S Africa 1.8	Malta 1.8	Malta 1.8	Malta 1.6	Malta 1.6
S Africa 0.8	S Africa 0.8	S Africa 0.8	Malta 1.6	S. Africa 1.2	S. Africa 1.2	S. Africa 1.1	S. Africa 0.9

A strong regulatory framework, attractive lifestyle, quality schools and the ability to work part-time for students are primary reasons for Australia's ongoing appeal as one of the top 4 destinations for English language study. "Australia has established a very strong niche in the market and has a clear identity in terms of the educational product and opportunities offered to international students," affirms Sue Blundell, Executive Director of English Australia, who says, "the Australian profile is based on nationally consistent quality standards, strong consumer protection mechanisms, a rewarding lifestyle and natural environment and a culture that allows learners to grow and explore within the learning environment."

2010 – Average course length (weeks): As a "long-haul" destination, Australia is in the top three countries when average course length is compared. This longer average course length combines with consistent numbers throughout the year (no real peaks/troughs) to give a degree of stability to the industry in Australia.

	2004	2005	2006	2007	2008	2009	2010
USA	**11.5**	**12.0**	**12.7**	**12.2**	**12.6**	**12.8**	**14.2**
Australia	**10.9**	**11.3**	**10.9**	**12.0**	**12.5**	**12.6**	**11.9**
Canada	**10.3**	**9.1**	**8.2**	**8.2**	**10.4**	**12.3**	**11.9**
NZ	**11.7**	**10.2**	**10.4**	**10.1**	**12.4**	**11.1**	9.5
S. Africa	6.3	6.0	**11.3**	8.1	6.7	6.5	6.7
UK	6.8	8.0	5.3	5.3	5.6	5.9	5.7
Ireland	3.1	6.0	6.2	7.6	5.3	3.3	3.8
Malta	2.9	2.4	2.4	2.4	2.6	2.5	2.5
	7.8	8.5	7.3	7.5	8.1	8.5	8.2

2010 – Average spend per week (US$): Currency fluctuations, cost of living variations and pricing strategies contribute to strong variations in the affordability of English language study and associated living expenses across the various destination options. Despite recording the strongest increase in the average spend per week for students, Australia continues to offer quality English training at a competitive price.

	2006	2007	2008	2009	2010	change
UK	$1,099	$1,080	$1,232	$1,185	$1,092	-8%
Ireland	$938	$1,384	$1,292	$1,183	$875	-26%
USA	$976	$912	$991	$830	$849	+2%
Canada	$697	$721	$1,029	$870	$801	-8%
Australia	$634	$740	$908	$681	$786	+15%
NZ	$593	$665	$709	$669	$698	+4%
Malta	$824	$847	$908	$683	$653	-4%
S. Africa	$571	$842	$744	$516	$560	+8%
average	$895	$918	$1,056	$915	$898	-2%

do you want to learn more?

English Australia provides data regarding the Australian English language industry to *Study Travel Magazine* each year as part of *Study Travel Magazine's* research into developing an annual report on global language travel trends.

The annual report is published in the December issue of *Study Travel Magazine* and can be viewed online at **www.hothousemedia.com**.

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Asia-Pacific Region

The Asia-Pacific region is defined by all countries on the entire Asian continent excluding Russia and the CIS. It also includes all South Pacific countries, but none from South America. Middle Eastern countries are no longer included in this section – details on this region can be found later in this report.

Total Asian enrolments

This section of the report presents the combined data for all enrolments (individuals and groups) from the Asia-Pacific region.

The tables below show the weighted data for enrolments in 2003-2010.

Fig 127. Total Asian enrolments 2003-2010

Nationality	2003	2004	2005	2006	2007	2008	2009	2010
Chinese	14,565	14,522	15,595	17,849	24,191	29,982	30,862	**27,863**
S. Korean	13,771	15,963	20,082	24,911	25,442	25,833	20,804	**20,026**
Japanese	20,742	25,853	25,869	24,641	21,318	18,610	16,221	**18,718**
Thai	4,492	4,912	5,130	6,282	7,049	8,988	9,502	**6,663**
Taiwanese	3,813	4,008	3,767	5,255	4,374	4,458	4,376	**5,388**
Vietnamese	635	1,065	999	1,492	2,627	5,451	6,530	**4,605**
Indonesian	1,895	1,742	1,820	1,529	1,658	2,527	2,311	**2,012**
Indian	-	-	-	2,864	8,626	14,833	10,498	**1,771**
HK Chinese	2,445	3,637	2,732	3,254	2,333	2,506	560	**906**
Other	1,846	2,846	2,960	2,419	3,844	4,646	4,128	**3,074**
Total	**64,205**	**74,547**	**78,955**	**90,496**	**101,463**	**117,834**	**105,792**	**91,025**

APPENDIX B
Extract from English Australia Survey of Major ELICOS Regional Markets in 2010

Fig 128. Total Asian enrolments 2009 & 2010 Comparison (ranked by % change)

Nationality	2009	2010	# Change	% Change
HK Chinese	560	906	346	**62%**
Taiwanese	4,376	5,388	1,012	**23%**
Japanese	16,221	18,718	2,497	**15%**
S. Korean	20,804	20,026	-778	**-4%**
Chinese	30,862	27,863	-2,999	**-10%**
Indonesian	2,311	2,012	-299	**-13%**
Vietnamese	6,530	4,605	-1,925	**-29%**
Thai	9,502	6,663	-2,839	**-30%**
Indian	10,498	1,771	-8,727	**-83%**
Other	4,128	3,074	-1,054	**-26%**
Total	**105,792**	**91,025**	**-14,767**	**-14%**

Asian enrolments dropped by 14% in 2010 driven by declines in key nationalities. The biggest drop was India at 83%. Significant declines were also seen in Thailand (-30%) and Vietnam (-29%). Hong Kong saw the biggest percentage increase restoring some of the loss from 2009. Japan performed well, after declining numbers for the past few years, with enrolments increasing by 2,497 or 15%.

The table below shows the total enrolment of Asian students in each state for 2010.

Fig 129. Total Asian enrolments by state 2010

	NSW	Qld	SA	Vic	WA	Total
Chinese	11,350	4,598	2,071	7,865	1,978	**27,863**
S. Korean	7,797	7,186	626	3,115	1,303	**20,026**
Japanese	6,630	7,917	505	1,727	1,939	**18,718**
Thai	3,331	1,028	103	1,610	590	**6,663**
Taiwanese	913	3,135	114	761	464	**5,388**
Vietnamese	1,621	556	219	1,878	330	**4,605**
Indonesian	1,023	236	65	418	269	**2,012**
Indian	606	399	150	507	109	**1,771**
Hong Kong	149	303	34	80	340	**906**
Other	1,422	488	249	577	339	**3,074**
Total	**34,841**	**25,847**	**4,137**	**18,540**	**7,660**	**91,025**

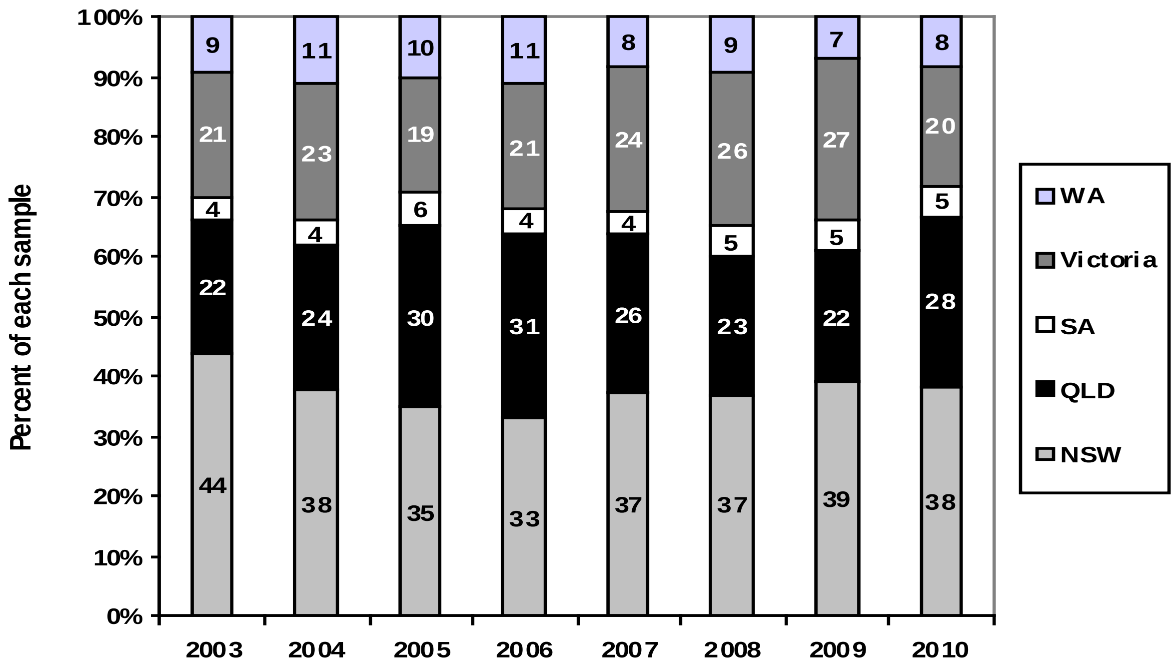
Queensland was the only state that didn't experience a decline in Asian enrolments in 2010. The largest decline was in Victoria with SA and NSW also showing strong declines.

Fig 130. Total Asian enrolments by state 2009 & 2010 Comparison

	2009	2010	Change	% Change
NSW	41,576	34,841	-6,735	**-16%**
Qld	22,856	25,847	2,991	**13%**
SA	5,132	4,137	-995	**-19%**
Vic	28,355	18,540	-9,815	**-35%**
WA	7,872	7,660	-212	**-3%**
Total	**105,792**	**91,025**	**-14,767**	**-14%**

NSW, Queensland and Victoria contributed the most to total Asian enrolments. The percentage of total enrolments from each state is shown in the following chart.

Fig 131. Percentage Asian enrolments by State



In 2010 there were significant shifts in terms of share. Queensland increased 6% to 28% and Western Australia increased 1%. Victoria declined 7% to 20%, NSW decreased 1% to 38% and South Australia remained stable.

APPENDIX B

Extract from English Australia Survey of Major ELICOS Regional Markets in 2010

Fig 132. Asian individual and group enrolments 2008-2010

	Total enrolments 2008			Total enrolments 2009			Total enrolments 2010		
	Ind.	Grp.	Total	Ind.	Grp.	Total	Ind.	Grp.	Total
Chinese	27,199	2,783	29,982	29,602	1,259	30,862	26,426	1,437	**27,863**
S. Korean	23,337	2,496	25,833	18,237	2,567	20,804	18,231	1,795	**20,026**
Japanese	12,590	6,020	18,610	11,162	5,059	16,221	12,225	6,493	**18,718**
Thai	8,155	833	8,988	8,964	538	9,502	6,408	255	**6,663**
Taiwanese	4,319	140	4,458	4,261	115	4,376	5,265	123	**5,338**
Vietnamese	5,390	61	5,451	6,326	204	6,530	4,515	90	**4,605**
Indonesian	2,340	187	2,527	1,987	324	2,311	1,718	294	**2,012**
Indian	14,785	48	14,833	10,498	-	10,498	1,771	-	**1,771**
HK Chinese	1,702	804	2,506	419	141	560	310	596	**906**
Other	4,530	116	4,646	4,025	103	4,128	2,957	117	**3,074**
Total	**104,347**	**13,487**	**117,834**	**95,481**	**10,309**	**105,792**	**79,826**	**11,200**	**91,025**

The overall decline in enrolments in 2010 was driven by individual enrolments as group enrolments increased marginally on 2009.

Chinese individual enrolments decreased in 2010, although there was a slight increase in group enrolments.

South Korea individual enrolments remained stable, with group enrolments decreasing.

Japanese individual and group enrolments increased, reversing the trend of the last 2 years.

The increase in Hong Kong enrolments was driven by an increase in groups, with individual enrolments decreasing.

Thai, Indonesian and Vietnamese group enrolments declined in 2010.

Total Asian visa status

The tables below show a breakdown of the visa status of all ELICOS students from the Asia-Pacific region for 2010.

Fig 133. Visa status of total Asian enrolments by country 2010

	Student visas	Visitor (tourist) visas	Working holiday Visas	Other visas	Total
Chinese	25,056	1,726		1,080	**27,863**
S. Korean	7,383	3,668	8,511	464	**20,026**
Japanese	3,728	11,073	3,379	538	**18,718**
Thai	5,614	853	26	169	**6,663**
Taiwanese	1,925	1,216	2,085	162	**5,388**
Vietnamese	4,384	86		135	**4,605**
Indonesian	1,491	390	9	122	**2,012**
Indian	1,620	12		138	**1,771**
Hong Kong	237	616	32	21	**906**
Asia Other	2,393	361	13	307	**3,074**
Total	**53,832**	**20,002**	**14,056**	**3,135**	**91,025**

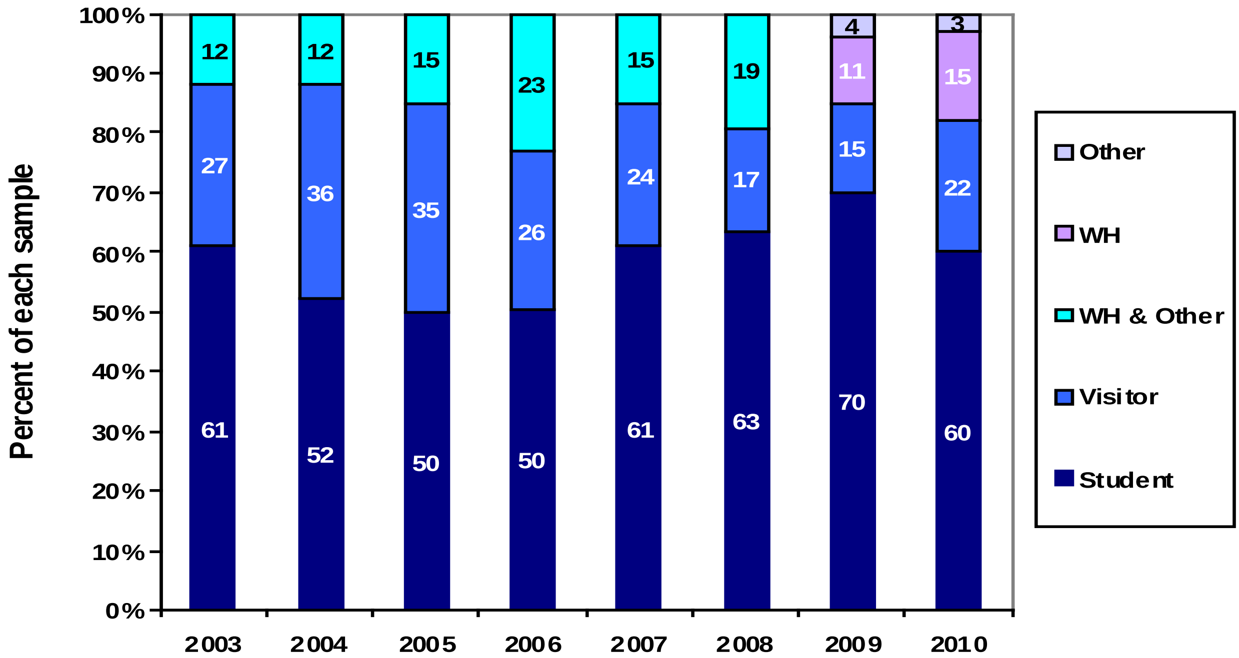
Fig 134. Visa status of total Asian enrolments by country 2010 (percentage)

	Student visas	Visitor (tourist) visas	Working holiday visas	Other visas
Chinese	90%	6%	-	4%
S. Korean	37%	18%	43%	2%
Japanese	20%	59%	18%	3%
Thai	84%	13%	>1%	3%
Taiwanese	36%	23%	39%	3%
Vietnamese	95%	2%	-	3%
Indonesian	74%	19%	>1%	6%
Indian	91%	>1%	-	8%
Hong Kong	26%	68%	4%	2%
Asia Other	78%	12%	>1%	10%
Total	**60%**	**22%**	**15%**	**3%**

Student visas made up the greatest number amongst Asian students generally and for most nationalities. The exceptions were Japan, where Visitor visas were more popular, and Korea and Taiwan, where WH visas were more popular.

The changes in visa status since 2003 are shown in the charts below. [Note: from 2009 working holiday and other visas have been separated.]

Fig 135. Asian: Visa enrolments 2003-2010



In 2010, the proportion of Asian students on student visas dropped from the peak experienced in 2009 to levels similar to 2007 & 2008 with six out of every 10 students being on this type of visa.

Visitor visas increased to 22% from 15% in 2009.

WH visas accounted for 15% of students increasing from 11% in 2009.

Total Asian student weeks

The tables below compare the total student weeks for each nationality, in terms of both absolute enrolments and percentage changes.

Fig 136. Total Asian student weeks 2003-2010 (total weeks)

Nationality	2003	2004	2005	2006	2007	2008	2009	2010
Chinese	199,316	169,468	187,779	207,700	313,628	387,837	408,600	**356,927**
S. Korean	183,716	201,884	251,376	304,387	331,644	327,240	226,977	**227,314**
Japanese	205,377	216,447	215,888	190,476	187,683	147,859	137,674	**138,199**
Thai	68,585	71,878	76,281	89,414	105,750	128,624	137,175	**95,330**
Vietnamese	9,168	13,358	12,634	19,834	39,154	108,397	123,130	**79,022**
Taiwanese	53,660	59,052	54,688	58,961	60,390	60,683	55,035	**57,719**
Indonesian	23,316	18,573	21,063	15,920	15,063	27,059	23,046	**20,016**
Indian	-	-	-	32,110	86,859	133,178	106,973	**12,525**
HK Chinese	30,906	33,942	28,256	31,016	27,006	27,112	6,193	**6,091**
Other	22,263	30,710	38,138	29,165	45,992	54,023	47,736	**31,863**
Total	**796,306**	**815,312**	**886,103**	**978,983**	**1,213,169**	**1,402,012**	**1,272,539**	**1,025,006**

China and South Korea are the most important source countries in terms of numbers of weeks enrolled.

Fig 137. Total Asian student weeks 2009-2010: Actual and percentage change

Nationality	2009	2010	# Change	% Change
Taiwanese	55,035	57,719	2,684	5%
Japanese	137,674	138,199	525	>1%
S. Korean	226,977	227,314	337	>1%
HK Chinese	6,193	6,091	-102	-2%
Chinese	408,600	356,927	-51,673	-13%
Indonesian	23,046	20,016	-3,030	-13%
Thai	137,175	95,330	-41,845	-31%
Vietnamese	123,130	79,022	-44,108	-36%
Indian	106,973	12,525	-94,448	-88%
Other	47,736	31,863	-15,873	-33%
Total	**1,272,539**	**1,025,006**	**-247,533**	**-19%**

Asian student weeks were 1,025,006 in 2010 (a decrease of -19% over 2009).

India lost -88%, Vietnam lost -36% and Thailand lost -31% in on 2009. The biggest percentage increases in student weeks were for Taiwanese students (5%).

The breakdown of Asian student weeks by state for 2010 in comparison with 2009 is shown below.

Fig 138. Total Asian student weeks by state 2010

	NSW	Qld	SA	Vic	WA	Total
Chinese	142,094	46,658	26074	118,852	23,249	**356,927**
S. Korean	92,979	75,034	6,749	37,091	15,461	**227,314**
Japanese	52,203	51,280	5,183	16,304	13,229	**138,199**
Thai	46,865	14,781	1,596	26,234	5,854	**95,330**
Vietnamese	28,563	5,963	4,565	35,591	4,340	**79,022**
Taiwanese	10,790	30,738	1,812	9,417	4,962	**57,719**
Indonesian	8,944	2,181	725	5,776	2,390	**20,016**
Indian	3,701	2,002	1,045	4,765	1,011	**12,525**
Hong Kong	2,054	1,559	417	787	1,274	**6,091**
Asia Other	12,830	4,475	3,514	7,244	3,801	**31,863**
Total	**401,023**	**234,671**	**51,682**	**262,060**	**75,571**	**1,025,006**

NSW, Victoria and Queensland contributed most to total Asian student weeks.

Fig 139. Total Asian student weeks by state 2009 & 2010: Actual and percentage change

	2009	2010	# Change	% Change
NSW	501,612	401,023	-100,589	**-20%**
Qld	242,078	234,671	-7,407	**-3%**
SA	60,205	51,682	-8,523	**-14%**
Vic	372,278	262,060	-110,218	**-30%**
WA	96,367	75,571	-20,796	**-22%**
Total	**1,272,539**	**1,025,006**	**-247,533**	**-19%**

In 2010 overall weeks decreased by -19% with Victoria showing the largest decrease in actual and percentage weeks of -30%. NSW decreased by 20% and WA by 22%.

The table below shows the average total Asian student weeks across nationalities, for the period 2003 to 2010.

Fig 140. Average total Asian student weeks 2003-2010

Nationality	2003	2004	2005	2006	2007	2008	2009	2010
Vietnamese	14.4	12.5	12.6	13.3	14.3	19.9	18.9	17.2
Thai	15.3	14.6	14.9	14.2	15.0	14.3	14.4	14.3
Chinese	13.7	11.7	12	11.6	13.0	12.9	13.2	12.8
S. Korean	13.3	12.6	12.5	12.2	13.0	12.7	10.9	11.4
Taiwanese	14.1	14.7	14.5	11.2	13.8	13.6	12.6	10.7
Indonesian	12.3	10.7	11.6	10.4	9.1	10.7	10.0	10.0
Japanese	9.9	8.4	8.3	7.7	8.8	7.9	8.5	7.4
Indian	-	-	-	11.2	10.1	9.0	10.2	7.1
HK Chinese	12.7	9.3	10.3	9.5	11.6	10.8	11.1	6.7
Other	14.0	13.0	14.6	15.3	16.7	19.4	17.0	10.4
Total	**12.5**	**11.1**	**11.4**	**11.1**	**12.0**	**12.7**	**13.0**	**11.3**

On average, each Asian student studied for 11.3 weeks in 2010, almost two weeks less than in 2009. South Koreans were the only nationality to increase the average weeks with all other nationalities decreasing the average number of weeks studying. Vietnamese students had the longest average course length with 17.2 weeks. Hong Kong Chinese students had the shortest average course length with 6.7 weeks.

The table below shows average total Asian student weeks by visa type.

Fig 141. Average total Asian weeks by visa type 2009

	Student visas	Visitor (tourist) visas	Working holiday visas	Other visas	Total
Vietnamese	17.6	5.3		11.0	**17.2**
Thai	15.9	5.2	7.4	8.9	**14.3**
Chinese	13.6	3.4		8.5	**12.8**
South Korean	16.8	5.4	9.3	8.2	**11.4**
Taiwanese	16.7	5.4	8.5	7.9	**10.7**
Indonesian	11.7	4.9	5.6	5.5	**10.0**
Japanese	18.2	3.2	9.4	4.6	**7.4**
Indian	7.3	6.0		4.4	**7.1**
Hong Kong	16.0	3.3	4.8	7.2	**6.7**
Asia Other	11.8	4.9	4.4	6.1	**10.4**
Total	**14.7**	**3.9**	**9.2**	**7.4**	**11.3**

Asian enrolees on Student visas enrolled for a longer number of student weeks than those on other visa types, studying on average 14.7 weeks in 2010.

Student visa holders from Vietnam, Taiwan and Japan have the longest average course length for Student visas, with Indian the shortest.

Visitor visa holders only study for 3.9 weeks on average.

Asian economic impact

The figures below are based on individual fees for each institution (collected on the survey). Where the exact individual fees could not be determined an average of $316 per student per week was used. The economic impact of group enrolment came from the data supplied on the survey and has been incorporated into the figures below. Additional spending of $1.92 for every dollar spent on fees has also been factored into these totals.

Fig 142. Economic impact of Asian enrolments 2010 (all figures in $m)

	Estimated fees paid by individual students	Fees paid by group	Total fees	Estimated additional spending by enrolees	Total spending
Chinese	$124.7	$2.4	$127.1	$244.0	**$371.0**
S. Korean	$64.0	$3.8	$67.8	$130.2	**$198.0**
Japanese	$37.3	$9.5	$46.8	$89.8	**$136.6**
Thai	$27.5	$0.3	$27.9	$53.5	**$81.4**
Vietnamese	$25.4	$0.4	$25.8	$49.5	**$75.3**
Taiwanese	$18.1	$0.2	$18.4	$35.2	**$53.6**
Indonesian	$5.9	$0.5	$6.4	$12.3	**$18.7**
Indian	$3.6	$0.0	$3.6	$6.9	**$10.5**
Hong Kong	$1.4	$0.9	$2.3	$4.4	**$6.7**
Other	$9.7	$0.2	$9.9	$18.9	**$28.8**
Grand Total	**$317.7**	**$18.1**	**$335.8**	**$644.8**	**$980.6**

Asian students contributed around $980.6 million to the Australian economy in 2010. The biggest contributors were Chinese, South Korean and Japanese enrolments.

The contributions made by each state are shown in the table below.

Fig 143. Total Asian student spending by state 2010 (all figures in $m)

	NSW	Qld	SA	Vic	WA	Total
Chinese	$146.7	$47.7	$26.0	$126.8	$23.9	**$371.0**
S. Korean	$76.5	$68.2	$5.9	$33.4	$13.9	**$198.0**
Japanese	$50.7	$51.2	$5.2	$17.3	$12.2	**$136.6**
Thai	$36.6	$13.3	$1.5	$24.4	$5.6	**$81.4**
Vietnamese	$26.2	$5.6	$4.3	$34.9	$4.2	**$75.3**
Taiwanese	$10.5	$27.6	$1.8	$8.9	$4.6	**$53.6**
Indonesian	$7.4	$2.3	$0.7	$6.0	$2.4	**$18.7**
Indian	$2.8	$1.7	$0.9	$4.1	$1.0	**$10.5**
Hong Kong	$2.1	$2.2	$0.4	$1.0	$1.0	**$6.7**
Other	$10.6	$4.2	$3.1	$7.1	$3.7	**$28.8**
Total	**$370.1**	**$224.3**	**$49.9**	**$263.8**	**$72.5**	**$980.6**

Enrolments in NSW, Queensland and Victoria accounted for the bulk of the economic impact, not surprising given that both these states also accounted for more Asian enrolments.

The changes in Asian student economic impact since 2003 are shown below:

Fig 144. Economic impact of total Asian students 2003-2010 (all figures in $m)

Nationality	2003	2004	2005	2006	2007	2008	2009	2010
Chinese	$180.3	$167.4	$179.2	$196.9	$282.2	$384.7	$407.8	**$371.0**
S. Korean	$157.2	$180.2	$228.3	$265.2	$300.9	$286.3	$201.9	**$198.0**
Japanese	$180.4	$209.0	$222.1	$175.2	$191.3	$145.2	$130.7	**$136.6**
Thai	$58.7	$65.4	$72.1	$83.2	$95.5	$118.2	$120.0	**$81.4**
Vietnamese	$8.2	$12.1	$11.9	$18.7	$34.8	$105.1	$117.7	**$75.3**
Taiwanese	$47.7	$52.1	$50.9	$53.4	$54.3	$56.8	$51.1	**$53.6**
Indonesian	$20.6	$17.7	$20.3	$15.9	$13.5	$26.6	$21.5	**$18.7**
Indian	-	-	-	$29.0	$77.3	$118.3	$90.0	**$10.5**
HK Chinese	$27.7	$32.2	$28.0	$30.9	$25.1	$29.4	$6.1	**$6.7**
Other	$34.1	$27.2	$35.9	$23.6	$40.9	$49.9	$43.9	**$28.8**
Total	**$714.9**	**$763.3**	**$848.7**	**$892.0**	**$1,115.8**	**$1,320.5**	**$1,190.7**	**$980.6**

There was an overall decrease of -18% in the economic impact made by Asian students in 2010.

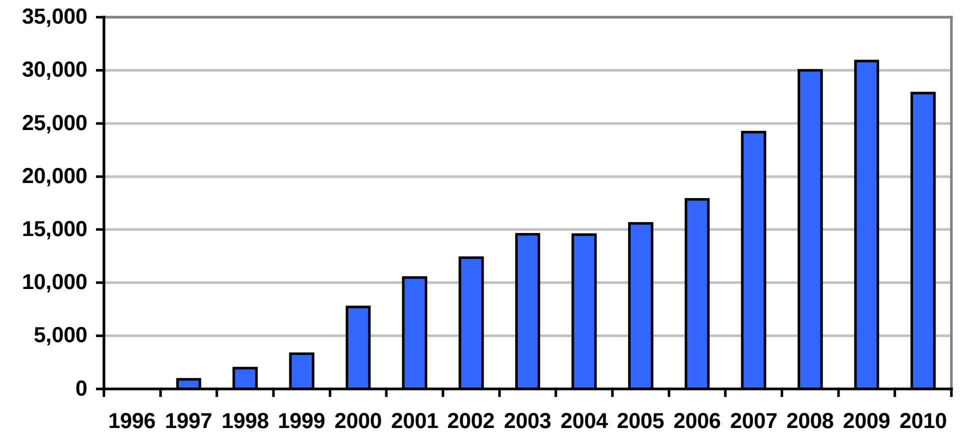
India had a decrease of $79.5 million or an 88% decrease on 2009. There were significant decreases from China, Thailand, Vietnam and Indonesia.

The largest dollar value and percentage increase in economic impact was seen for Japanese enrolments. Taiwanese also generated an increase on 2009.

#1 China

There has been a steady increase in enrolments from China since 1996 (900), with this growth accelerating up to 2008 and tapering in 2009. In 2010 enrolments decreased by -10% which is in line with the -10% decrease in the overall market. It has maintained number one position in 2010.

Fig 68. China: Enrolments 1996-2010



The majority of Chinese students are on student visas and these have shown a decrease of -12% on 2009. In 2010 visitor visa (+27%) and other visas (+14%) both increased though on a very small base.

Fig 69. China: Visa Status 2009 & 2010

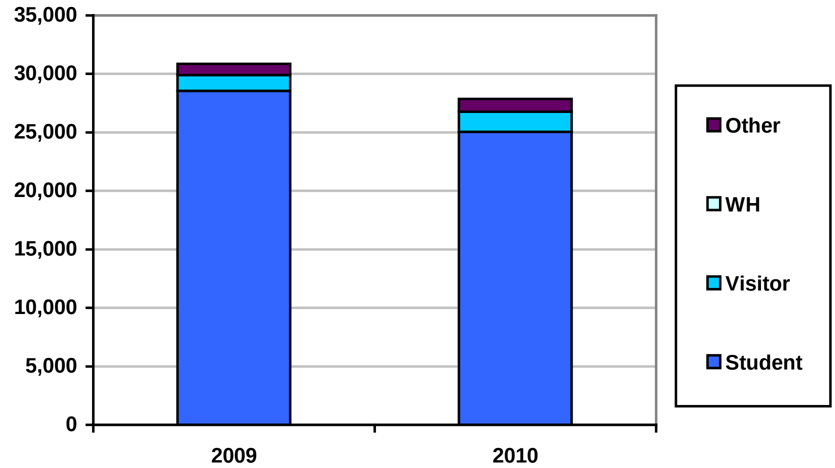
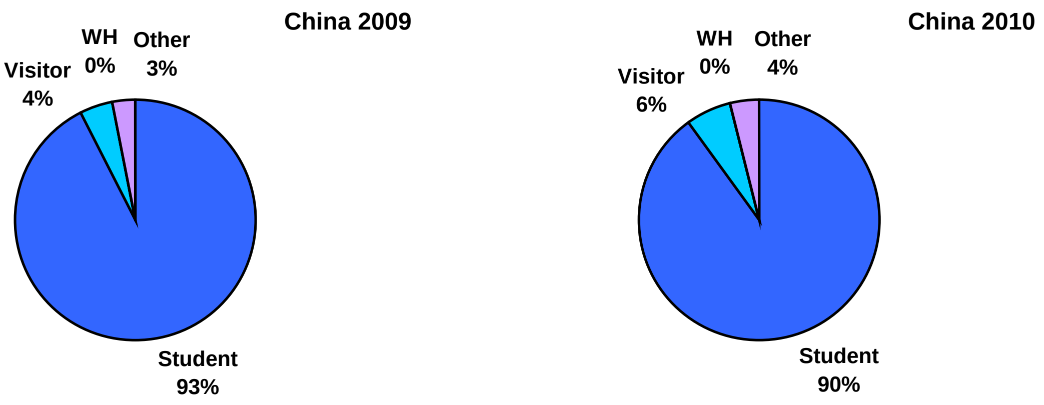


Fig 70. China: Visa Change 2009 v 2010

China	2009	2010	# Change	% Change
Student	28,555	25,056	-3,499	-12%
Visitor	1,356	1,726	370	27%
WH	-	-	-	-
Other	951	1080	129	14%
Total	**30,862**	**27,863**	**-2,999**	**-10%**

Student visas declined in numbers as well as proportionately for China as the charts below indicate.

Fig 71. China: Visa Status 2009 v 2010



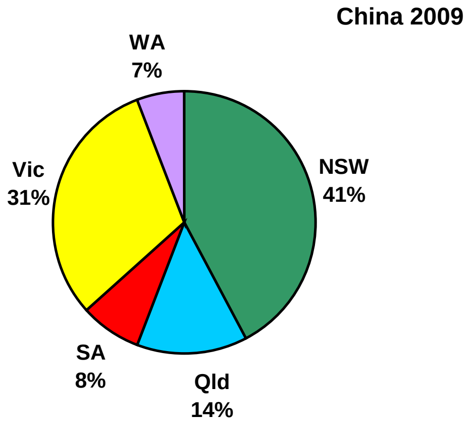
NSW has the greatest share of the Chinese ELICOS market with 41%, remaining stable from 2009, though there was a decline in actual enrolments.

Victoria is the second largest market for Chinese students though this decreased in 2010 from 31% to 28%.

Queensland increased its share from 14% to 17% of the market. WA had 10% growth from Chinese students. SA dropped 1% in national share to 7%. WA and Queensland have a smaller share of Chinese students than their share of all nationalities.

Queensland and Western Australia were the only states to experience growth from China at 9% and 10% respectively.

Fig 72. China: State 2009 v 2010



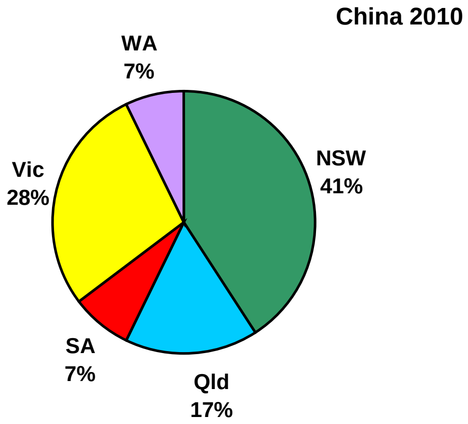


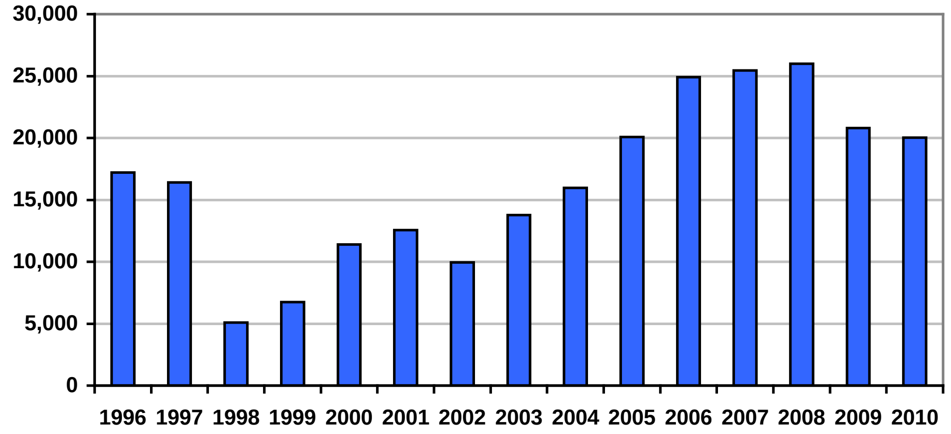
Fig 73. China: State 2009 v 2010

China	2009	2010	# Change	% Change
NSW	12,999	11,350	-1,649	-13%
Qld	4,215	4,598	383	9%
SA	2,335	2,071	-264	-11%
Vic	9,521	7,865	-1,656	-17%
WA	1,791	1,978	187	10%

#2 South Korea

South Korean ELICOS enrolments declined in 2010 to 20,026 though the decline was not as strong as was experienced in 2009. This decline followed a plateauing of the Korean market between 2006 and 2008 when numbers peaked at around 25,000. This is a decline of -4% on 2009 and takes numbers back to 2005 levels.

Fig 74. South Korea: Enrolments 1996-2010



The South Korean market has declined in 2010 across all visa types except working holiday, which increased 18%. The biggest shift has been in other visas with a decline of -55% on 2009. Student visa and visitor visa numbers also declined.

Fig 75. South Korea: Visa Status 2009& 2010

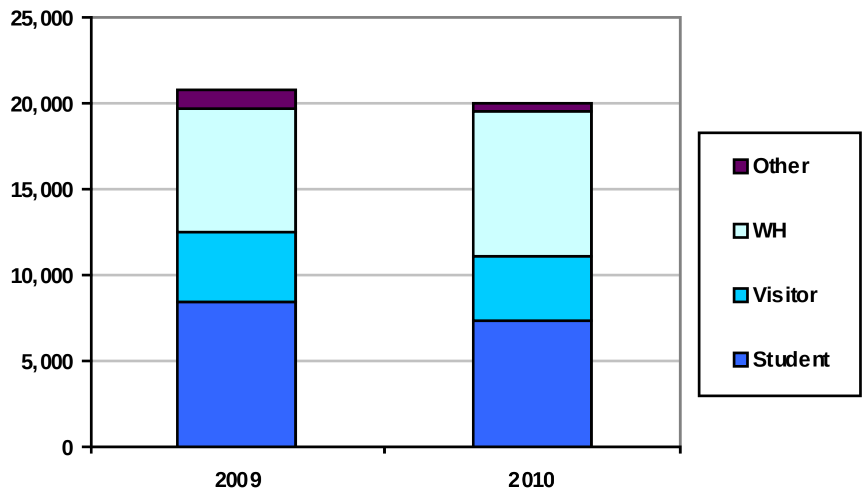
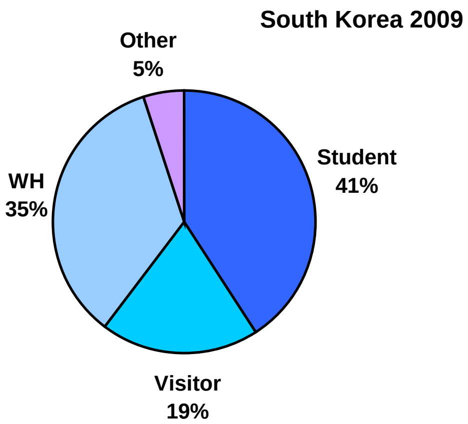


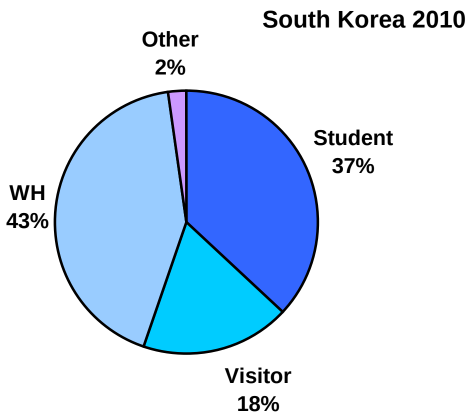
Fig 76. South Korea: Visa Change 2009 v 2010

South Korea	2009	2010	# Change	% Change
Student	8,469	7,383	-1,086	-13%
Visitor	4,046	3,668	-378	-9%
WH	7,240	8,511	1,271	18%
Other	1,049	464	-585	-56%
Total	**20,804**	**20,026**	**-778**	**-4%**

The Working Holiday visa share has increased in 2010 and it is now the most common visa used by South Korean enrollees. The Student visa share declined to 37% from 41% in 2009. Other visas declined to 2%.

Fig 77. South Korea: Visa Status 2009 v 2010



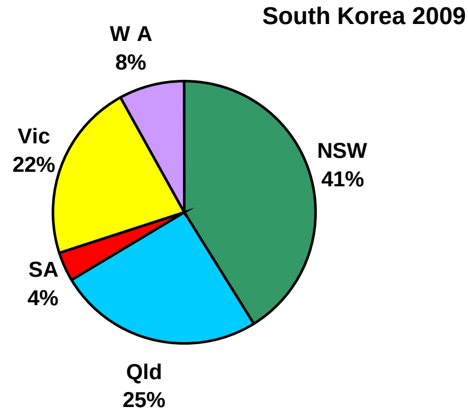


There has been a major change in the State profile for the South Korean market with Queensland gaining 11% at the expense of Victoria (-6%), NSW (-3%), WA (-1%) and SA (-1%), though all of these are on lower actual student enrolments.

NSW has the biggest proportional share of enrolments at 38% with Queensland in close second position with 36% (returning to the same share as in 2008).

Victoria's decline to 16% share reflected a decline in enrolments of 32%. Western Australia's share declined by 1% and it also lost numbers in 2010 dropping 22% in enrolments. SA dropped 19% in enrolments with share declining 1%.

Fig 78. South Korea: State 2009 v 2010



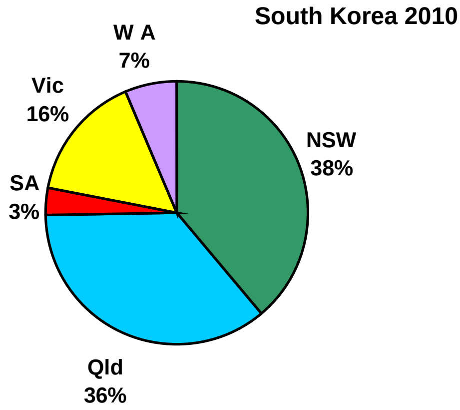


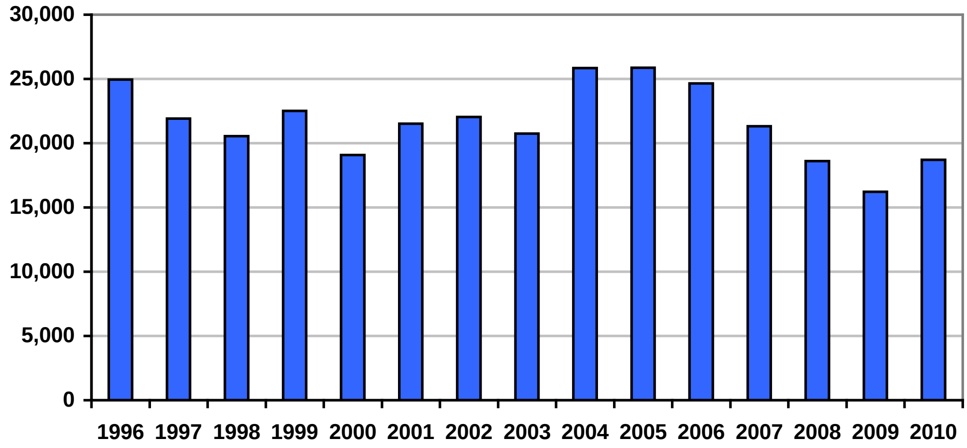
Fig 79. South Korea: State 2009 v 2010

	2009	2010	# Change	% Change
NSW	8,529	7,797	-1,649	-13%
Qld	5,259	7,186	1,927	37%
SA	769	626	-143	-19%
Vic	4,582	3,115	-1,467	-32%
WA	1,665	1,303	-362	-22%

#3 Japan

ELICOS numbers for Japan have declined from their peak of around 25,000 in 2004/2005, dropping in 2009 to the lowest numbers ever enrolled since the English Australia survey commenced in 1996. In 2010 enrolment numbers returned to growth, recording 18,610 commencements. Japan is still the third most important source country for ELICOS, despite this decline.

Fig 80. Japan: Enrolments 1996-2009



Visitor visas have shown an increase of 38% from 2009 accounting for 60% (up from 50% in 2009) of Japanese ELICOS students. Total enrolment numbers have increased for Japan driven by the increase inVisitor visas.

Student visas have shown an decrease of -2% from 2009 with WH declining -13% and Other declining -4%.

Fig 81. Japan: Visa Status 2009 & 2010

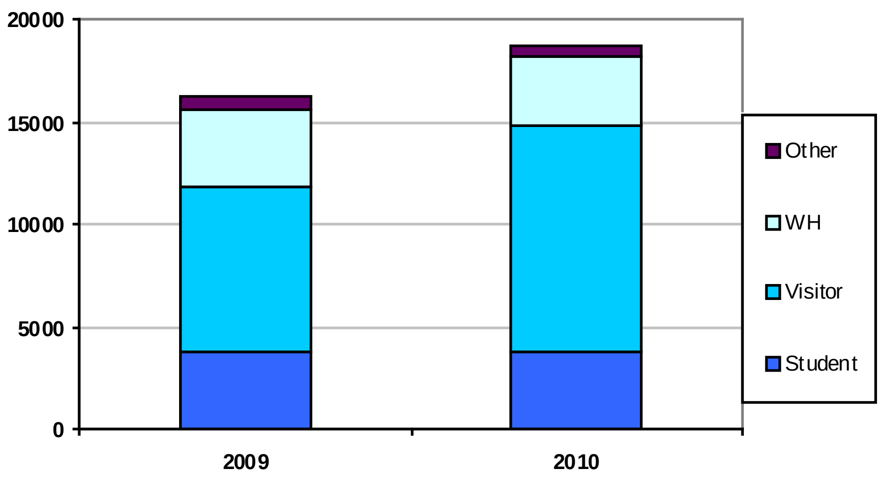
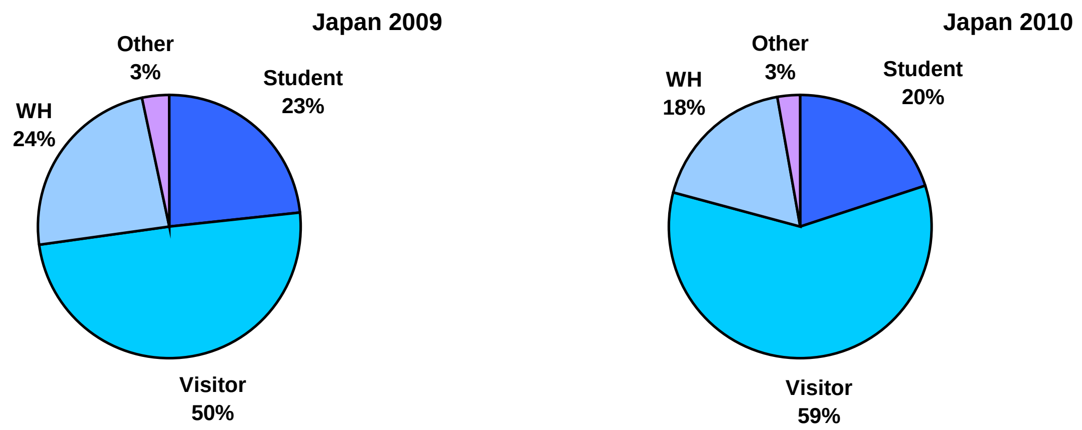


Fig 82. Japan: Visa Change 2009 v 2010

	2009	2010	# Change	% Change
Student	3,797	3,728	-69	-2%
Visitor	7,997	11,073	3,076	38%
WH	3,866	3,379	-487	-13%
Other	561	538	-23	-4%
Total	**16,221**	**18,718**	**2,497**	**15%**

Visitor visas remain the visa of choice for Japanese ELICOS students, with Student visas and WH decreasing in importance in 2010.

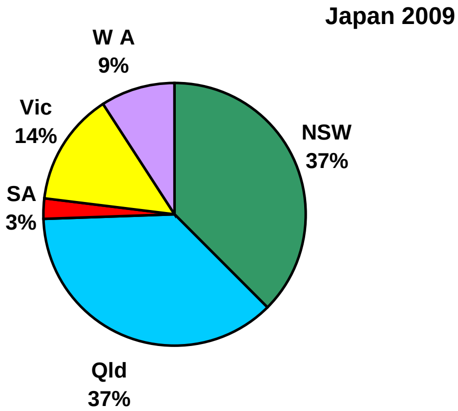
Fig 83. Japan: Visa Status 2009 v 2010



The state share of the Japanese market has altered in 2010 compared with 2009. Queensland has gained in actual enrolments (accounting for a 38% increase) and this boosted its state share to 43% (from 37% in 2009). Though NSW had an increase in student numbers (up 9%), its share dropped to 35% (from 37%). WA had a 31% increase in enrolments and this helped boost its share to 10%.

Victoria was the only state to have a decline in enrolments of 23% and this impacted on the decline in its share to 9%. SA maintained its share of 3%.

Fig 84. Japan: State 2009 v 20010



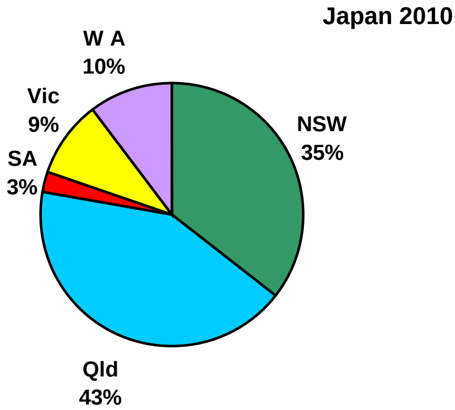


Fig 85. Japan: State 2009 v 2010

	2009	2010	# Change	% Change
NSW	6,095	6,630	535	9%
Qld	5,961	7,917	1,956	38%
SA	444	505	61	14%
Vic	2,244	1,727	-517	-23%
WA	1,477	1,939	462	31%