

Leading Trend Indicators – an ELICOS sector perspective

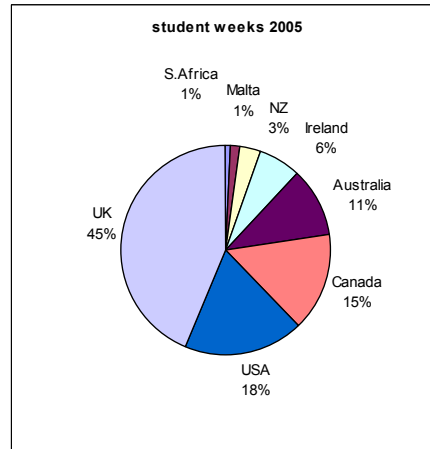
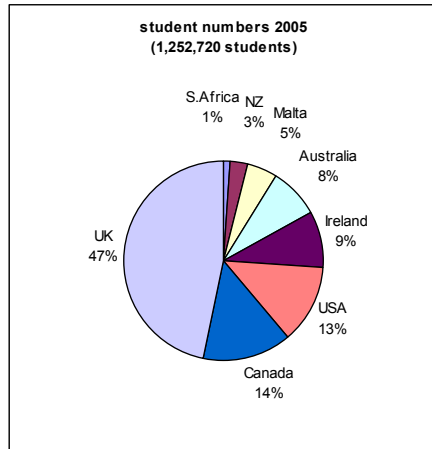
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English Australia

AIEC – October 2006

The Global market for ELT

- Precise size unknown, however estimated value of US\$9.2 billion in 2005 (up from US\$8.3 billion in 2004), with over 1,271,000 students (up from 1,221,000 in 2004 – growth of +3%).
- Dominated by UK (46% of students – down from 50% in 2004); USA (14%) now matched by Canada(14%).
- Australia 8.0% of students (up from 7.5% in 2004 & 6.1% in 2003) and 10.7% of student weeks (up from 10.4 in 2004 & 8.8% in 2003).

The Global market for ELT



SOURCE: LANGUAGE TRAVEL MAGAZINE OCTOBER 2006

2005 Global growth - students



	2004	2005	+/-
UK	617,038	586,186	-5%
Canada	141,762	178,261	+26%
USA	156,375	162,055	+4%
Ireland	95,160	113,940	+20%
Australia	91,129	101,087	+11%
Malta	55,578	61,607	+11%
NZ	51,456	35,749	-31%
S. Africa	12,940	13,835	+7%
	1,221,438	1,252,720	+3%

2005 Global growth - weeks



	2004	2005	+/-
UK	4,182,112	4,689,488	+12%
USA	1,798,313	1,943,045	+8%
Canada	1,465,900	1,628,742	+11%
Australia	995,918	1,142,016	+15%
Ireland	294,996	683,640	+132%
NZ	602,035	364,640	-39%
Malta	162,714	148,599	-9%
S. Africa	81,522	83,010	+2%
	9,583,510	10,683,180	+11%

Average length of course



Australia	11.3
USA	10.9
NZ	10.2
Canada	9.0
UK	8.0
S. Africa	6.0
Ireland	6.0
Malta	2.4

Average student spend per week (\$US)



UK	\$1,062
Ireland	\$805
USA	\$760
Canada	\$732
Malta	\$634
Australia	\$616
NZ	\$551
S. Africa	\$532

1996 – 2006



- NEAS accredited colleges
 - 1996 – 124 colleges
 - 2006 – 234 colleges (89% growth)

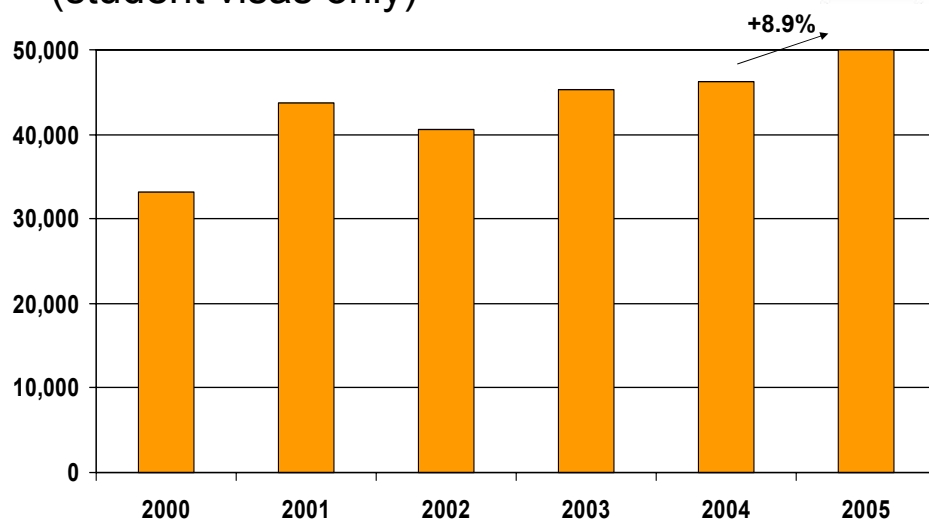
- ELICOS students
 - 1996 – 72,545
 - 2005 – 101,087 (39% growth)

Statistics

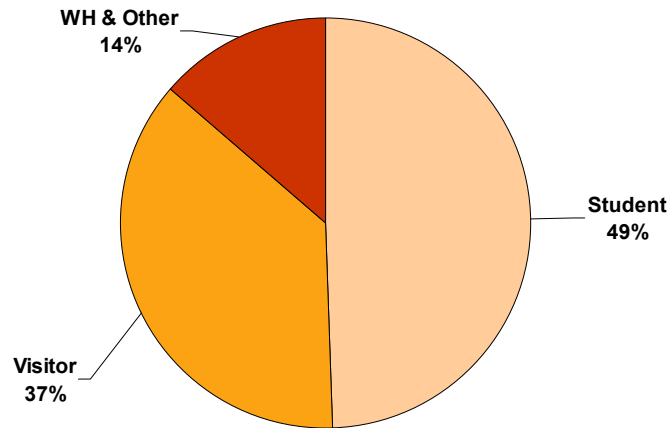


- Two main sources of statistics:
 - AEI (Australian government) produces statistics every month for Student visa holders across all sectors;
 - English Australia (EA) also produces an annual report which includes Visitor and Working Holiday & Other visa holders and covers the English language sector.

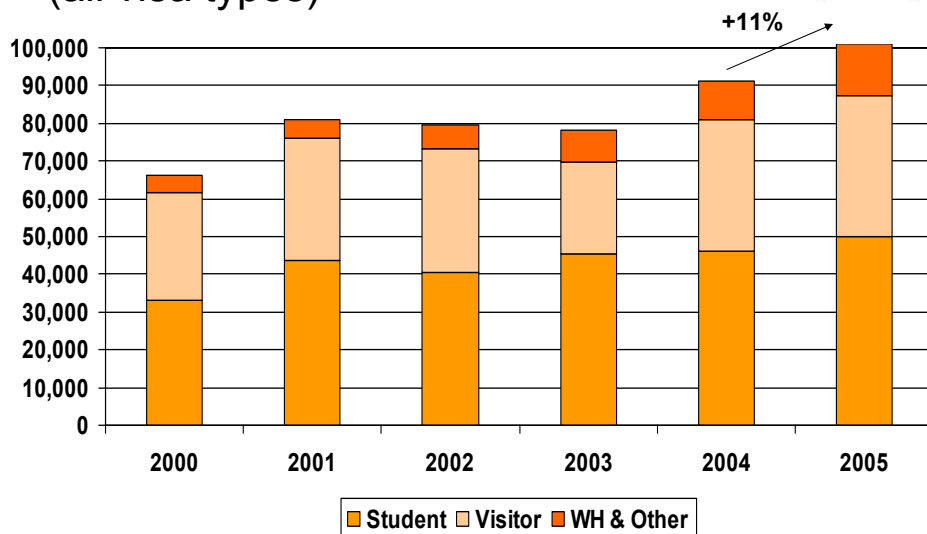
ELICOS commencements (student visas only)



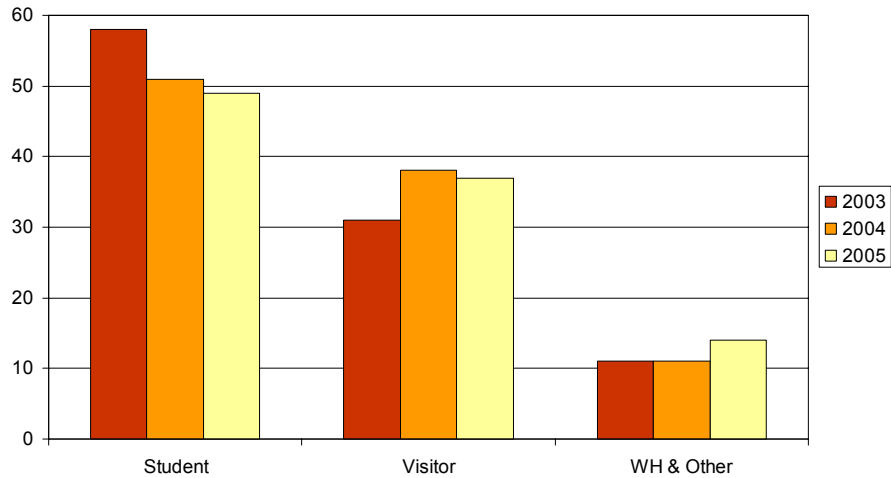
2005 ELICOS students – visa types



ELICOS commencements (all visa types)



Top 6 ELICOS countries (EA data)



2005 – key statistics



- 101,087 students (increase of 11%)
- 1,142,016 student weeks (increase of 15%)
- 84% individuals, 16% groups
- average length of course 11.3 weeks
- Aus\$1.082 billion in export earnings

2005 – source of growth



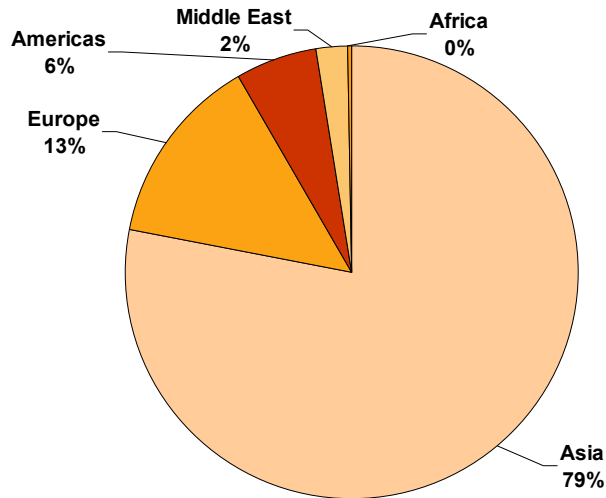
- +8% in student visa holders (3,762)
- +7% in visitor visa holders (2,368)
- +38% in working holiday & others (3,827)
- +7% growth from Asia (4,408)
- +20% growth from Europe (2,262)
- +66% growth from Americas (2,437)
- +51% growth from Middle East (752)

2005 – source of growth

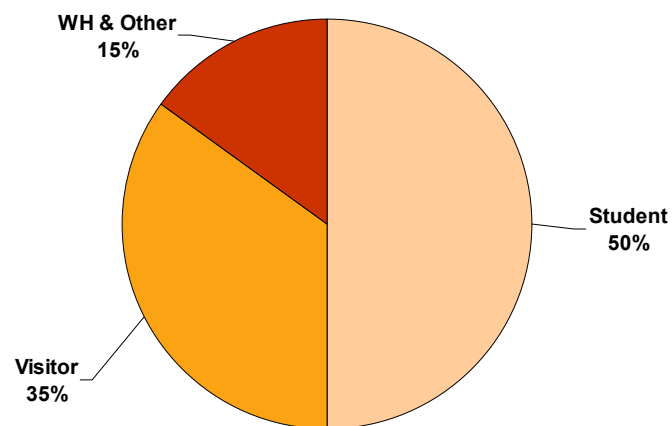


- +13% growth in individual students (9,847)
- +1% growth in group students (111)
- increase in individuals from Korea (4,119)
- increase in individuals from Brazil (1,844)
- increase in individuals from China (1,073)
- increases mainly in QLD (+25%) & SA (20%)

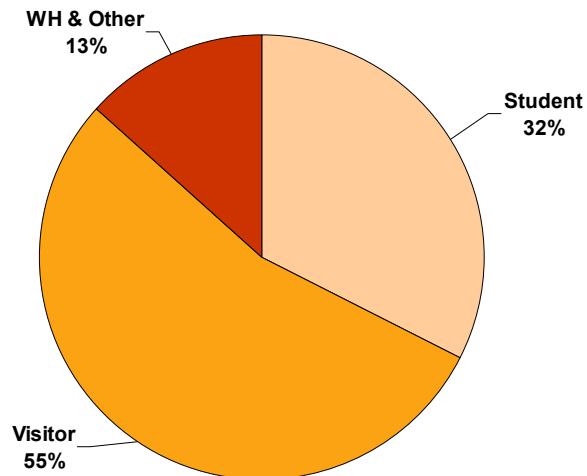
2005 ELICOS students – regions



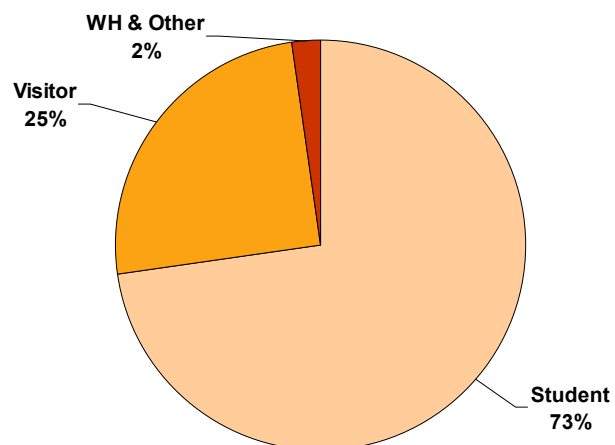
2005 ELICOS students – visa types - Asia



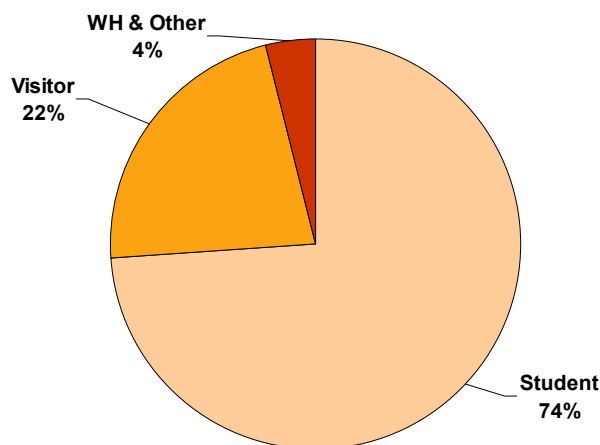
2005 ELICOS students – visa types - Europe



2005 ELICOS students – visa types - Americas



2005 ELICOS students – visa types – Middle East

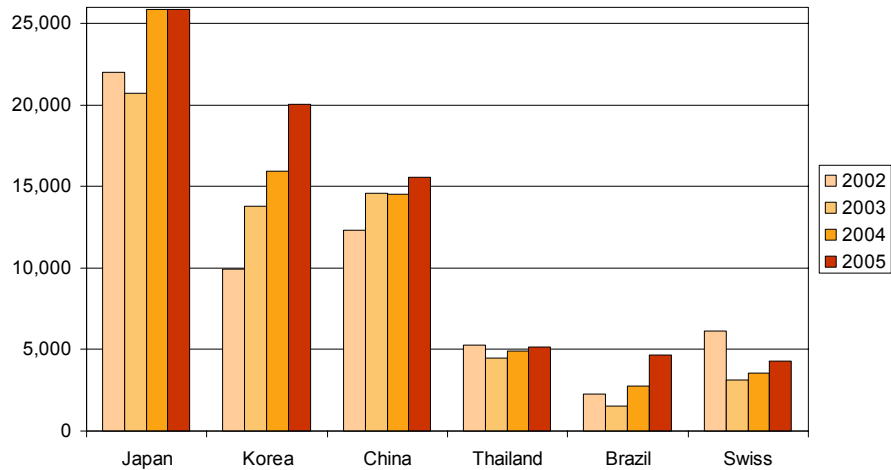


Average length of course (wks)

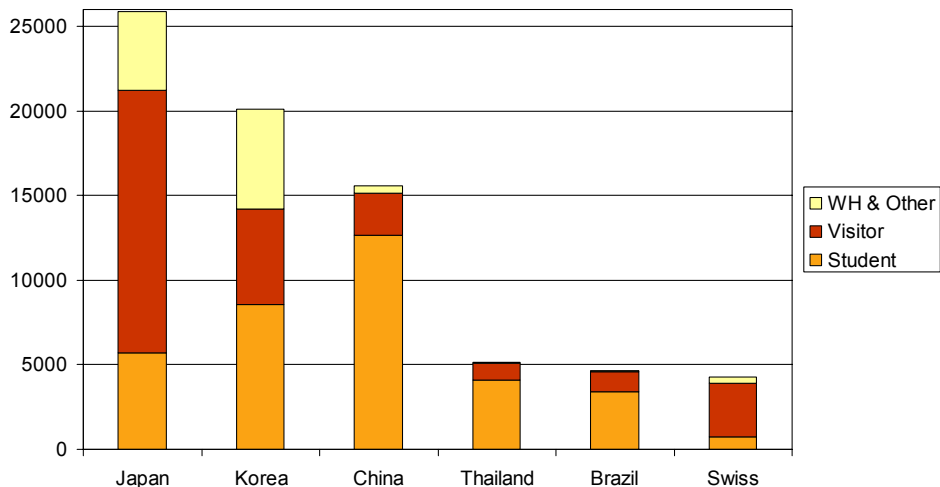


	Asia	Europe	Americas	Middle East
Student	16.8	15.9	17.4	20.5
Visitor	4.6	6.3	5.7	6.5
WH & Other	8.5	6.4	7.6	9.3
Total	11.3	9.4	14.2	17.0

Top 6 ELICOS countries (all visa types)



Top 6 ELICOS countries (all visa types – 2005 data)

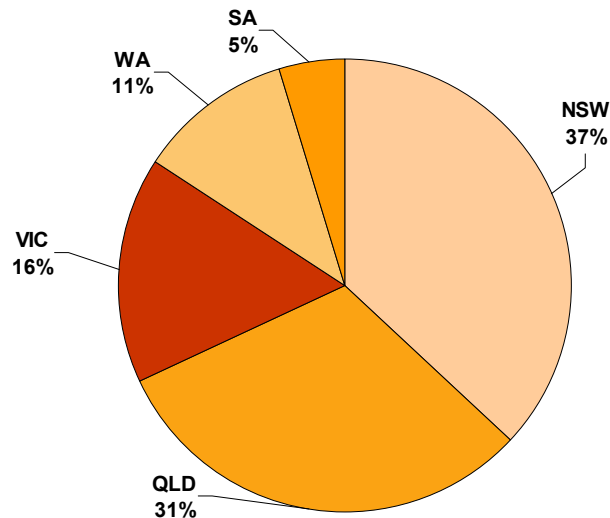


Average length of course (wks)



	Japan	Korea	China	Thailand	Brazil	Swiss
Student	20.1	19.7	13.7	17.1	16.8	14.2
Visitor	4.1	5.8	4.4	5.9	5.8	8.2
WH & Other	8.2	8.5	8.1	8.6	7.3	8.3
Total	8.3	12.5	12.0	14.9	13.9	9.3

2005 ELICOS students – state share



Pathways



- Data used for analysis relates to student visa holders only
- Data covers enrolments over a three year period – longitudinal/pipeline [429,022]
- Majority of student visa enrolments are single sector (76%) [327,478]
- Single sector ELICOS [57,825]
- 24% were multiple sector [101,544]
- 68% of multiple sector students were enrolled in ELICOS at some stage [69,147]

Pathways



- 45.5% ELICOS only
- 20.7% ELICOS to Higher Ed
- 12.8% ELICOS to VTE
- 7.8% ELICOS to Schools
- 7.6% multiple pathway eg. ELICOS to Schools to Higher Ed
- 55% of ELICOS student visa holders pathway through to other sectors
- therefore 27% of all visa holders pathway

AEI Statistics YTD August



Sector	2005	2006	
ELICOS	33,782	38,941	+15.3%
Schools	9,383	9,780	+4.2%
VTE	29,605	37,983	+28.3%
Higher Ed	62,720	65,273	+4.1%
Other	19,351	19,330	-0.1%
TOTAL	154,841	171,307	+10.6%

AEI Statistics YTD August

(student visa holders only)



- ELICOS growth accelerating
 - +31% growth in July
 - +21% growth in June
- QLD & NSW producing strongest growth
- Top 3 nationalities = 50% of student visas, (61% of all visa types)
- Top ten – Colombia & India have replaced Indonesia & Czech Republic

AEI Statistics YTD August

(student visa holders only)



- showing increases for ELICOS from South Korea (+24%), Brazil (+42%), Thailand (+16%), Taiwan (+17%), India (+127%), Colombia (+166%), Hong Kong (+11%) and Vietnam (+50%)

(of top 10 countries)

- showing decreases for ELICOS from China (-9%) and Japan (-10%)

(of top 10 countries)

Summary



- global market for ELT still increasing
- Australia's market share slowly increasing
- ELT market dominated by 3 countries (61%)
- 2 of these countries in decline for Australia
- decreasing importance of student visa holders
- QLD increasing share of ELT market
- pathway programs a relatively small part of the ELICOS market