

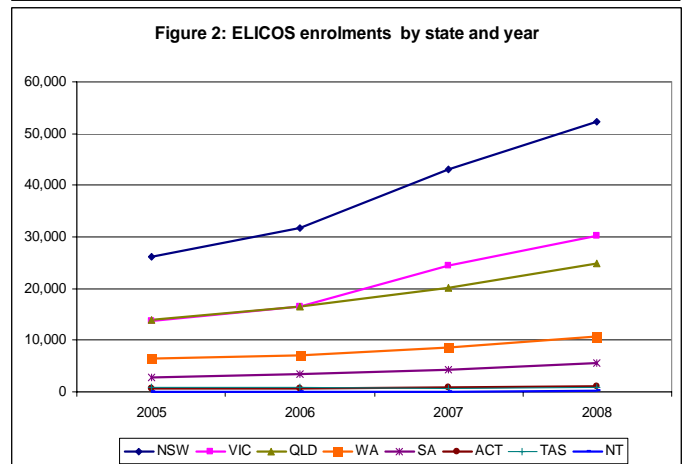
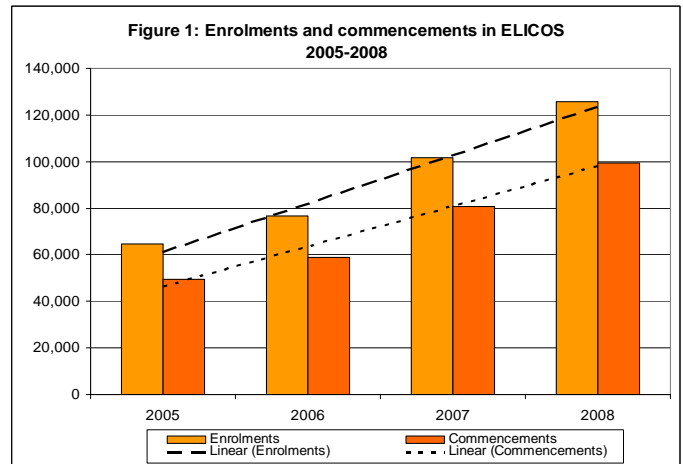


International Student Enrolments in ELICOS in 2008

During 2008, enrolments in ELICOS rose to 125,727. This represents growth of 23.4% over 2007 numbers. Commencements rose to 99,312, growing by 22.8%. The growth rate in this sector has been consistently high since 2005 (see Figure 1). In 2008, the rate of growth of commencements was lower than that for enrolments for the first time in recent years, possibly indicating a slowing of growth in this sector in the future. However, ELICOS was the third most popular sector in 2008 in terms of volume, accounting for 23.1% of all enrolments. Since 2005, growth in VET enrolments overtook those in ELICOS.

NSW had the largest number of ELICOS enrolments and commencements, with 41.6% and 41.3% share of ELICOS enrolments and commencements, respectively. Other states with more than 10% share of enrolments were Victoria (24%) and Queensland (19.8%). Regardless of market share, all states except Tasmania have shown continued growth since 2006 (see Figure 2).

The north-east Asia region continues to have the greatest share of enrolments (43.9%), but this share has dropped from 66.6% in 2003. Other regions gained in market share – including southern and central Asia (up from 2.4% in 2003 to 15.6% in 2008) and the Americas (up from 4.5% in 2003 to 13.1% in 2008). Overall growth has been driven primarily by very large growth in enrolments from India (from 450 enrolments in 2003 to 16,029 in 2008) and South American countries (in particular Brazil and Colombia). The top five countries for enrolment volume were China, India, South Korea, Brazil and Thailand. The top five countries for percentage growth on the previous year with more than 1,000 enrolments were Saudi Arabia, Vietnam, India, Nepal and Indonesia.



Enrolments by all sectors

Sector	2005	2006	2007	2008	Growth on 2007
Higher Ed	162,680	169,710	174,577	182,770	4.7%
VET	65,568	82,543	119,836	175,461	46.4%
ELICOS	64,539	76,822	101,856	125,727	23.4%
Other	26,255	26,431	27,406	31,142	13.6%
Schools	25,113	24,506	26,884	28,798	7.1%
Total	344,155	380,012	450,559	543,898	20.7%

ELICOS enrolments by state and year

Sector	2005	2006	2007	2008	Growth on 2007
NSW	26,118	31,723	43,077	52,283	21.4%
VIC	13,728	16,582	24,378	30,232	24.0%
QLD	13,959	16,497	20,075	24,891	24.0%
WA	6,377	7,133	8,525	10,641	24.8%
SA	2,890	3,363	4,192	5,568	32.8%
ACT	627	671	789	1,072	35.9%
TAS	799	784	722	876	21.3%
NT	41	69	98	164	67.3%
Total	64,539	76,822	101,856	125,727	23.4%

ELICOS enrolments by nationality and year

Nationality (top 15 & others)	2008	Growth on 2007
China	31,494	24.5%
India	16,029	75.2%
Republic of Korea	13,347	-7.0%
Brazil	9,630	33.2%
Thailand	8,556	17.4%
Vietnam	6,045	104.0%
Japan	5,203	-20.4%
Saudi Arabia	4,947	113.4%
Colombia	4,557	34.1%
Taiwan	3,099	-10.6%
Indonesia	2,192	34.6%
Nepal	1,894	60.4%
Hong Kong	1,734	-16.2%
Czech Republic	1,180	-14.1%
Turkey	1,138	27.7%
Other Nationalities	14,682	15.3%
Total	125,727	23.4%