



Smart City Office

# City of Melbourne Tertiary Student and Education Profile

2016

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## Tertiary Student and Education Profile

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### **Disclaimer**

While all due care has been taken to ensure that the content of this report is accurate and current, there may be errors or omissions. No legal responsibility is accepted for the information and opinions contained within.

All sources are checked and verified, and while exact figures are presented in this report it is recommended that they are treated as best estimates.

In addition, this report is based on historic information that is subject to revision.

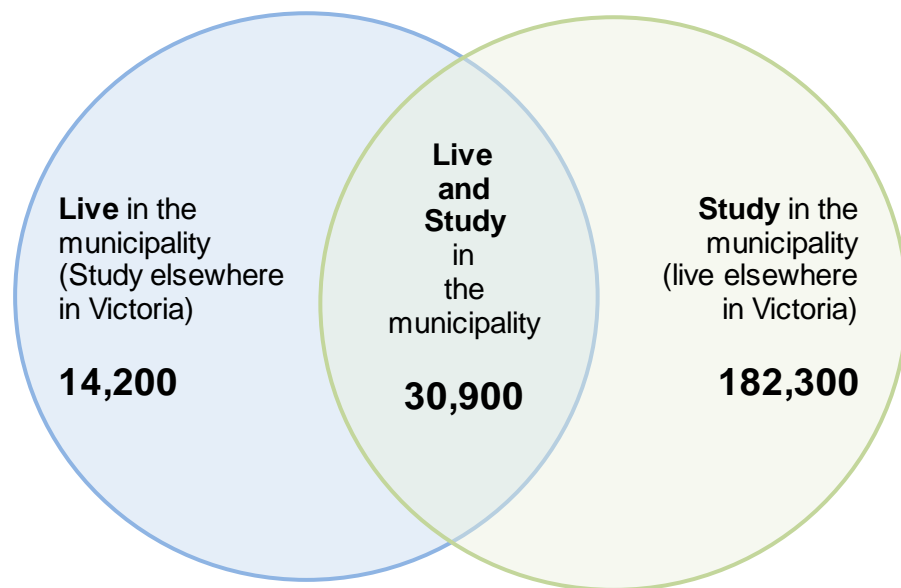
### **Rounding**

Certain numbers in this profile have been rounded up or down. There may therefore be discrepancies between the individual amounts in the tables and the totals shown in the tables, as well as the numbers given in the corresponding text. All percentage changes and key figures were calculated using the underlying data.

## 1. Snapshot of tertiary students in the municipality

During the calendar year of 2014, there were just under a quarter of a million tertiary students (227,400) living and/or studying in the municipality; as set out in Figure 1 below.

**Figure 1 – Summary of tertiary students living and/or studying in the municipality (combined higher education and VET students)**



In total **227,400** tertiary students either lived and/or studied in the municipality in 2014

Approximately 30,900 tertiary students lived and studied in the municipality, while 14,200 lived within the municipality but studied elsewhere in Victoria.

The majority of tertiary students, approximately 182,300, lived outside the municipal boundary and studied at campuses or institutions located within the municipality.

## 2. Background and Definitions

### Student attendees

Student numbers are measured and reported in various ways by different education institutions and departments at each level of government in Australia. Throughout this report the focus is on student attendees as opposed to student enrolments. This ascertains the physical number of students in the municipality (City of Melbourne) without including students who may be studying online or remotely, not being physically present.

Commencement data is used for English Language Intensive Course for Overseas Students (ELICOS) analysis, whereby a student has at least commenced the course in which they were enrolled in.

### Tertiary students

Tertiary students comprise higher education (university or similar) and VET (Vocational Education and Training; TAFE or similar) students. Tertiary students make up the overwhelming majority of students either living and/or studying in the municipality and are therefore discussed in more detail than other student types in this report.

### Overseas or Domestic tertiary students

Higher education student data is collected in a slightly different way compared to VET student data, resulting in different determinations for overseas students. While overseas higher education students are determined in part by student visa status along with student enrolment and attendee status, overseas VET students are determined by the initial address a student enters on his/her enrolment form alone. Where analysis of overseas compared to domestic tertiary students is discussed in this report, higher education student data is used only, to avoid misinterpretation due to differing methodologies in data collection by the various bodies responsible.

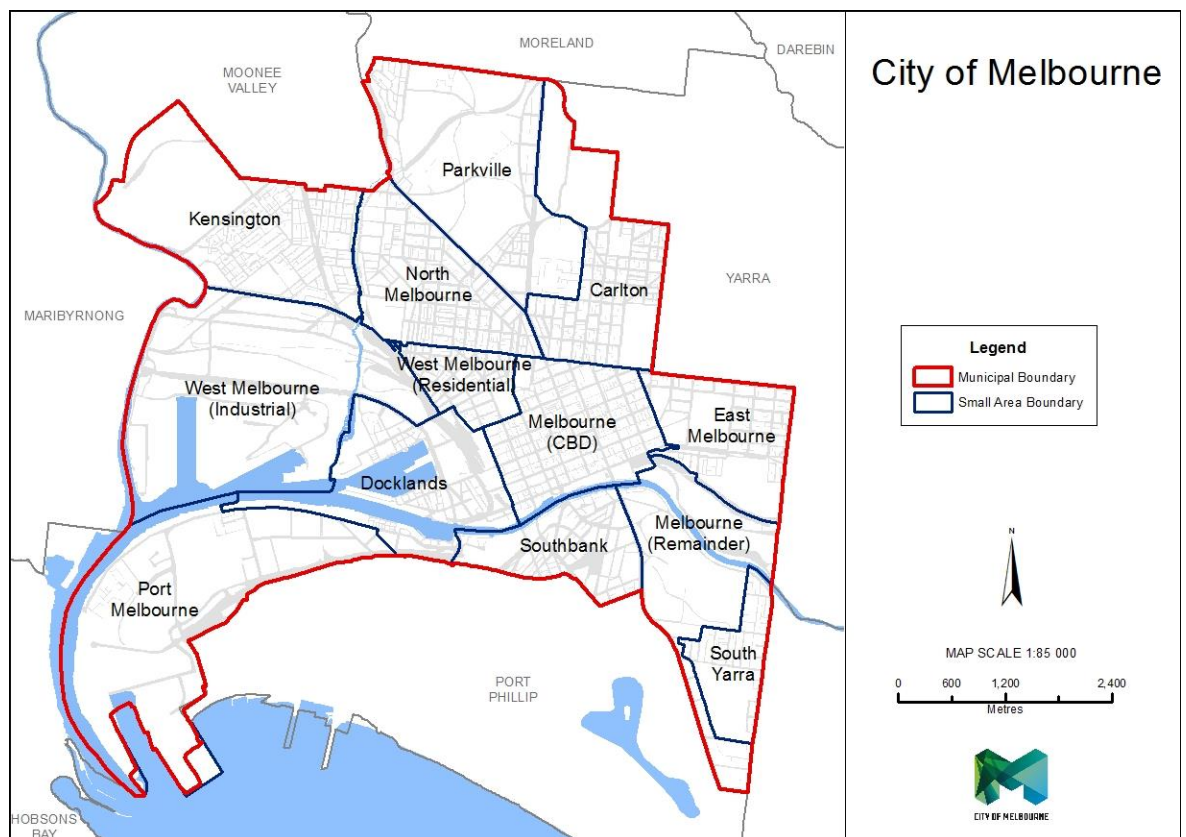
### Living and/or studying in municipality

Three key definitions are used in analysing tertiary student attendees in the municipality:

1. Students living within the municipality (and studying at campuses or institutions elsewhere within Victoria)
2. Students studying at campuses or institutions within the municipality (and living outside the municipality elsewhere within Victoria)
3. Students living and studying within the municipality

### 3. Geography of City of Melbourne

Throughout this report the terms ‘City of Melbourne’ and the ‘municipality’ are used to refer to the same geographic area, which includes the small areas of Carlton, Docklands, East Melbourne, Kensington (and the Flemington Racecourse), Melbourne CBD and Remainder, North Melbourne, Parkville, Port Melbourne, Southbank (including South Wharf), South Yarra (east of Punt Road) and West Melbourne.



### 4. Data sources

**Higher education** data is sourced from the Department of Education and Training student database.

Higher education student data for 2014 is the most current, complete and full year data set made available by the Department of Education and Training at the time of writing this report.

<http://education.gov.au/>

**Vocational Education and Training (VET)** data is sourced from the National Centre for Vocational Education Research (NCVER). Data provided by the NCVER are the Australian vocational education and training statistics: Students and courses 2014.

<http://www.ncver.edu.au>

**English Language Intensive Courses for Overseas Students (ELICOS)** data is sourced from the Australian Education Institution (AEI). Enrolment data is derived from the Commonwealth Provider Registration and International Student Management System (PRISMS) database.

<http://www.elicos.com/>

## 5. Detailed findings

### 5.1. Tertiary students living and/or studying in the municipality

The majority of tertiary students lived outside the municipality and attended a campus or training provider located within the municipality – approximately 182,300 tertiary students in total, comprising 81,600 higher education students and 100,700 VET students.

The majority of higher education students were domestic students (67 per cent), and one third (33 per cent) were overseas students in Australia on study visas – proportions which remained relatively stable with a slight increase (two percentage points) from the previous calendar year.

Tertiary students living within the municipality were more likely to have been higher education students rather than VET students (83 per cent compared to 17 per cent). This represents a two percentage point shift from VET students to higher education students when compared to 2013 (81 per cent compared to 19 per cent). Remaining stable with only a one percentage point change from 2013, higher education students living within the municipality were more likely to have been overseas students rather than domestic students (57 per cent compared to 43 per cent).

**Figure 2 – Tertiary students living and/or studying in the municipality**

2014 Tertiary students	Higher education			VET	Combined Tertiary
	Domestic	Overseas	Total HE	Total VET	
Live and study in the municipality	10,400	16,700	27,100	3800	<b>30,900</b>
Live in the municipality (study elsewhere)	5700	4800	10,500	3700	<b>14,200</b>
Study in the municipality (live elsewhere)	63,300	18,300	81,600	100,700	<b>182,300</b>
<b>Total</b>	<b>79,400</b>	<b>39,800</b>	<b>119,200</b>	<b>108,200</b>	<b>227,400</b>
<i>Sub-total: tertiary students <b>living</b> in the municipality</i>	16,100	21,500	37,600	7500	<b>45,100</b>
<i>Sub-total: tertiary students <b>studying</b> in the municipality</i>	73,700	35,000	108,700	104,500	<b>213,200</b>



## Tertiary Student and Education Profile

### 5.2. Higher education students in the municipality

#### 5.2.1. Higher education students living and/or studying in the municipality

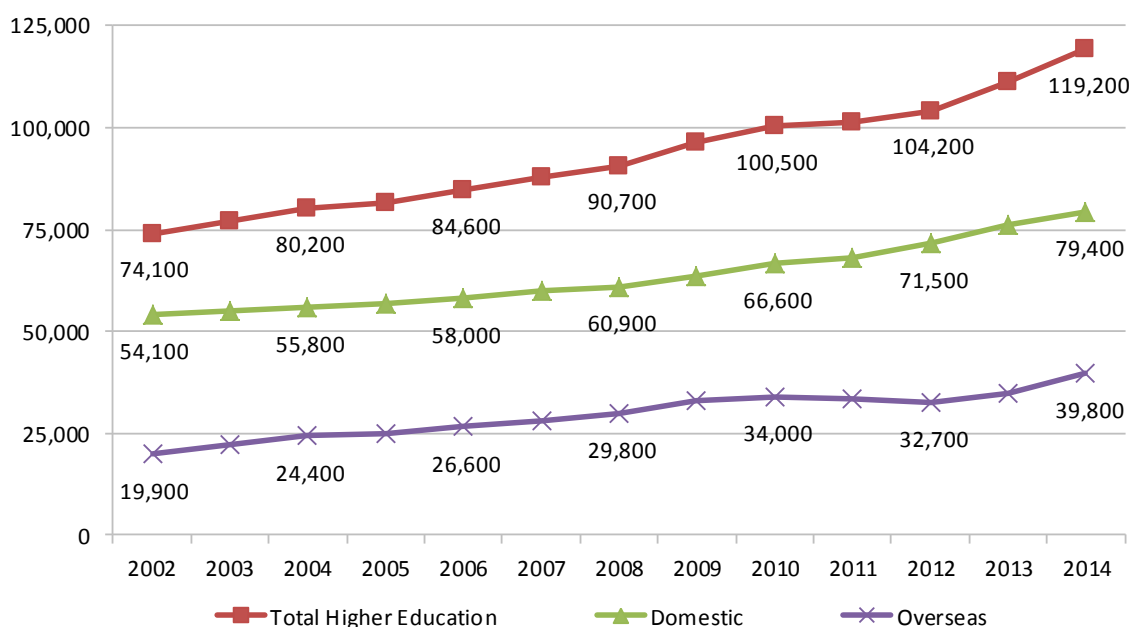
Figure 3 shows the 12 year trend of higher education students living and/or studying in the municipality, with the total count of higher education students displayed with the component domestic and overseas student sub-groups.

The number of overseas higher education students living and/or studying in the municipality increased by 14 per cent in 2014 to the highest overall count to date of 39,800 individuals. When compared to previous years, this 14 per cent increase is the highest percentage increase in one year since the previous highest of 11 per cent in 2009. This continues the increase in overseas higher education students from 2012 to 2014, following two consecutive years of slight negative growth (of around -2 per cent per annum) in 2011 and 2012.

The number of domestic higher education students also increased in 2014 to the highest overall count to date of 79,400 individuals, representing a 4 per cent increase from 2013.

The increase in both overseas and domestic higher education students living and/or studying in the municipality resulted in the overall number reaching the highest recorded total of 119,200 individuals.

**Figure 3 – Higher education students living and/or studying in the municipality**



Note: Variations in total figures are due to rounding.

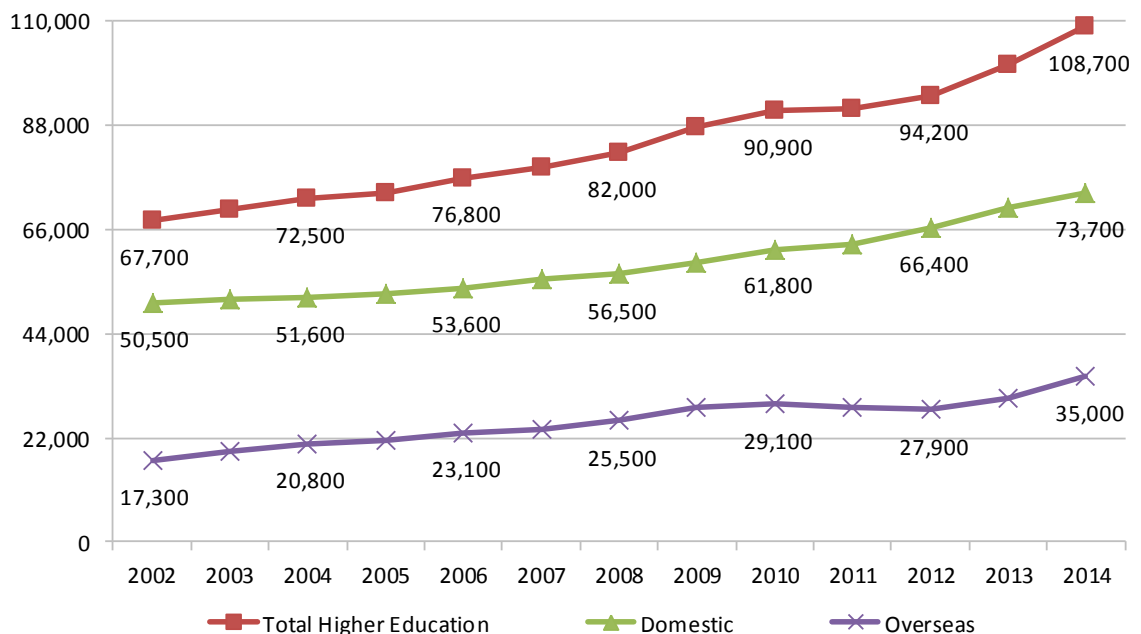
### 5.2.2. Higher education students studying in the municipality (living in the municipality or elsewhere)

The number of higher education students studying at campuses in the municipality regardless of residential location, followed the same upward trajectory in 2014 as students living and/or studying in the municipality (section 5.2.1). This upward trend of 8 per cent between 2013 and 2014 resulted in the overall number of higher education students studying in the municipality reaching the highest number recorded of 108,700 individuals.

Overseas higher education students studying in the municipality experienced large increases again following the slight decline in this cohort during 2011 and 2012. The 2013 increase of 9 per cent was surpassed by a 15 per cent increase in 2014. With this strong response to the earlier decline, the number of overseas higher education students studying in the municipality is now approximately 35,000 individuals in 2014.

For the past three years, 2012 to 2014, the growth rate for the number of domestic higher education students studying in the municipality has averaged around 5 per cent per annum to take the total to 73,700.

**Figure 4 – Higher education students studying in the municipality**



Note: Variations in total figures are due to rounding.

## Tertiary Student and Education Profile

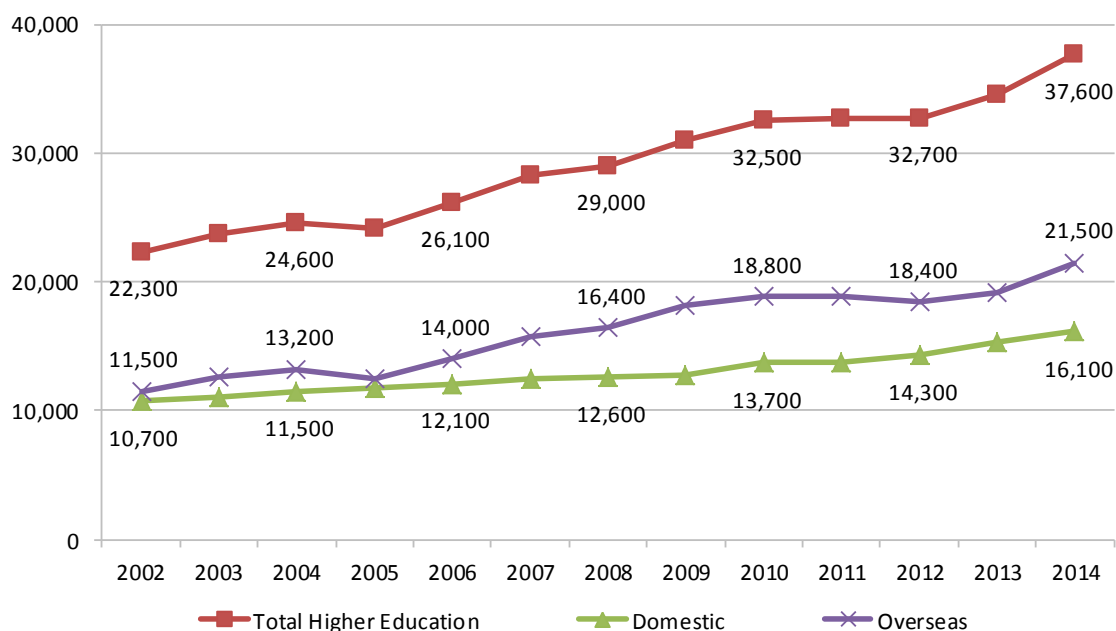
### 5.2.3. Higher education students living in the municipality (studying either in the municipality or elsewhere)

Higher education residents from overseas living in the municipality experienced the highest percentage increase since 2007 of 12 per cent and the largest total on record of approximately 21,500. The number of domestic higher education students living in the municipality has increased at an average of 5 per cent per annum for the past five years.

Increases to both overseas and domestic higher education students resulted in nine per cent overall growth for higher education students living in the municipality, regardless of where they studied in 2014. This represents the largest proportional increase among residential higher education students in the reported history from 2002 onwards.

The number of overseas higher education students that live within the municipality is greater than their domestic counterparts as shown in Figure 5. In contrast, domestic higher education students studying in the municipality (section 5.2.2, Figure 4) are much greater than overseas student numbers. This demonstrates that overseas higher education students are more likely to both live and study within the municipality.

**Figure 5 – Higher education students living in the municipality (studying in the municipality or elsewhere)**



Note: Variations in total figures are due to rounding.

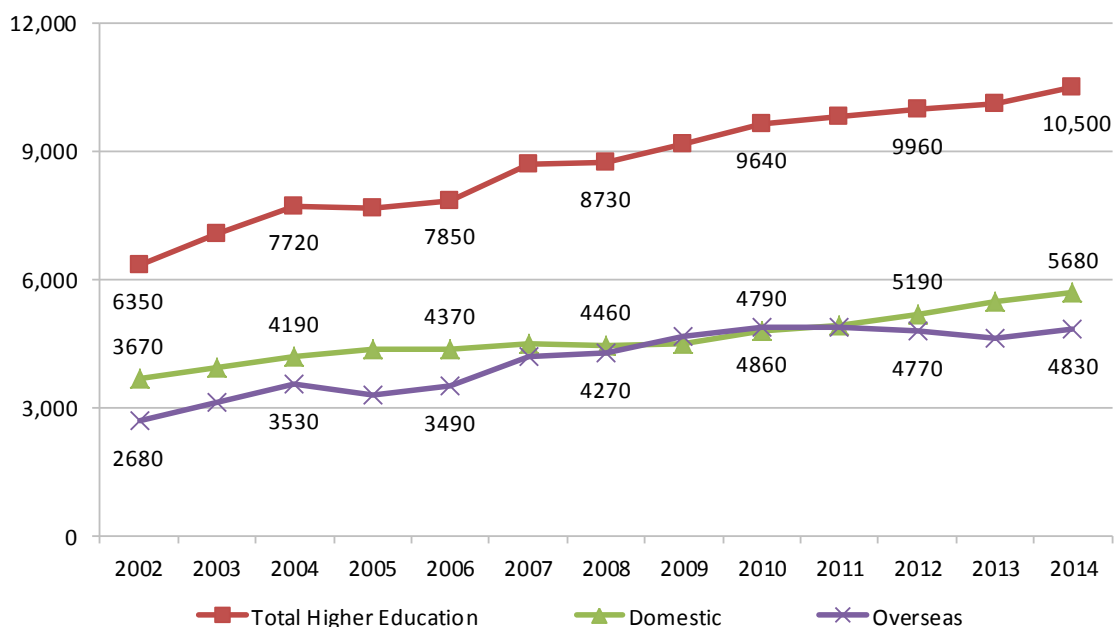
### 5.2.4. Higher education students living in the municipality (studying outside the municipality)

In 2014 the number of domestic higher education students living in the municipality but studying elsewhere, increased by 4 per cent from 2013. For the past five years the growth rate of domestic students has averaged around 5 per cent per annum. The number of overseas students also increased by 4 per cent from 2013, marking the first time since 2010 that overseas student numbers have increased. With both domestic and overseas student numbers increasing from 2013, the total number of higher education students living in the municipality, but studying outside the municipality, has risen to 10,500.

During the period 2008 to 2011 the totals of both domestic and overseas higher education students living in the municipality while studying at campuses outside the municipality were very similar, differing by a maximum of only 200 students. The number of overseas higher education students was greater than the number of domestic students for two years, with overseas students accounting for 2 per cent more in 2009 and almost 1 per cent more in 2010.

The trend since 2011 has been for domestic higher education students to be more likely than overseas students to live in the municipality and study outside, with domestic students accounting for 8 per cent more than overseas students in 2014. The current results are a return to the general trend observed prior to 2007.

**Figure 6 – Higher education students living in the municipality (studying elsewhere)**



Note: Variations in total figures are due to rounding.

### ***5.2.5. Nationality of overseas higher education students studying in the municipality***

Students from North-East, South-East and Southern Asian countries accounted for 84 per cent of overseas higher education student nationalities studying in the municipality in 2014. Overseas students with Chinese\* nationality accounted for approximately one third (32 per cent) of all overseas higher education students in the municipality. This was greater than the total number of students from the next four nationalities in Figure 7 combined (Indian, Malaysian, Indonesian and Vietnamese students collectively accounted for 31 per cent).

The North-East Asian region including China, Hong Kong, South Korea, Taiwan, Japan, Macau, Mongolia and North Korea, accounted for 36 per cent. A quarter of higher education students are from South-East Asia, consisting of Malaysia, Indonesia, Viet Nam, Singapore, Thailand, Philippines, Cambodia, Burma (Myanmar), Brunei Darussalam, Laos and East Timor. Southern Asia further accounts for a quarter of overseas students in the municipality. This includes students coming from India, Pakistan, Sri Lanka, Nepal, Bangladesh, Bhutan and the Maldives.

The largest yearly increase of overseas students from a single country came from Brazil, experiencing a 144 per cent increase to equate to 1 per cent (or 370) of all overseas higher education students studying in the municipality.

Numbers of higher education students of Indian nationality who were studying in the municipality increased 72 per cent from 2013 to 2014. This increase equated to India having the largest total proportional increase of overseas higher education students, increasing from 9 per cent in 2013 to 14 per cent in 2014.

Other nations to experience large increases from 2013 to 2014 include Nepal (increase of 62 per cent, to 2 per cent of total overseas students) and Pakistan (increase of 35 per cent, to 4 per cent of the total overseas students).

Conversely, student attendees from the following nations experienced declines between 2013 and 2014: South Korea (-10 per cent), Hong Kong (-4 per cent) and Iran (-2 per cent). The nation with the largest decline was actually Australia (including students born in Australia, who live abroad and have re-entered as a non-citizen on a study Visa arrangement), with a decline of 39 per cent from 2013 to 2014.

*\* Mainland China only. Does not include SARs (Self-Administered Regions) and Taiwan Province*

**Figure 7 – Top 20 countries of nationality of overseas higher education students attending campuses in the municipality**

Nationality (top 20)	Count of higher education students	Proportion of total overseas higher education students	Change from 2013
China (excludes SARs and Taiwan Province)	11,100	32%	15%
India	4820	14%	72%
Malaysia	2730	8%	1%
Indonesia	1790	5%	4%
Viet Nam	1670	5%	9%
Pakistan	1380	4%	35%
Singapore	1220	3%	0%
Sri Lanka	870	2%	22%
Nepal	740	2%	62%
Hong Kong (SAR of China)	610	2%	-4%
Thailand	480	1%	5%
Philippines	440	1%	0%
Korea, Republic of (South)	420	1%	-10%
United States of America	400	1%	1%
Brazil	370	1%	144%
Bangladesh	370	1%	22%
Saudi Arabia	340	1%	9%
Iran	320	1%	-2%
Australia*	310	1%	-39%
Taiwan	280	1%	6%
<i>Other countries</i>	4010	11%	17%
<i>No information</i>	260	1%	-58%
<b>Total overseas higher education students studying in the municipality</b>	<b>35,000</b>	<b>100%</b>	<b>15%</b>

\*Australia includes students whose country of birth is Australia, who live abroad and have entered Australia as a non-citizen of Australia under a study visa arrangement.

Note: Variations in total figures are due to rounding.

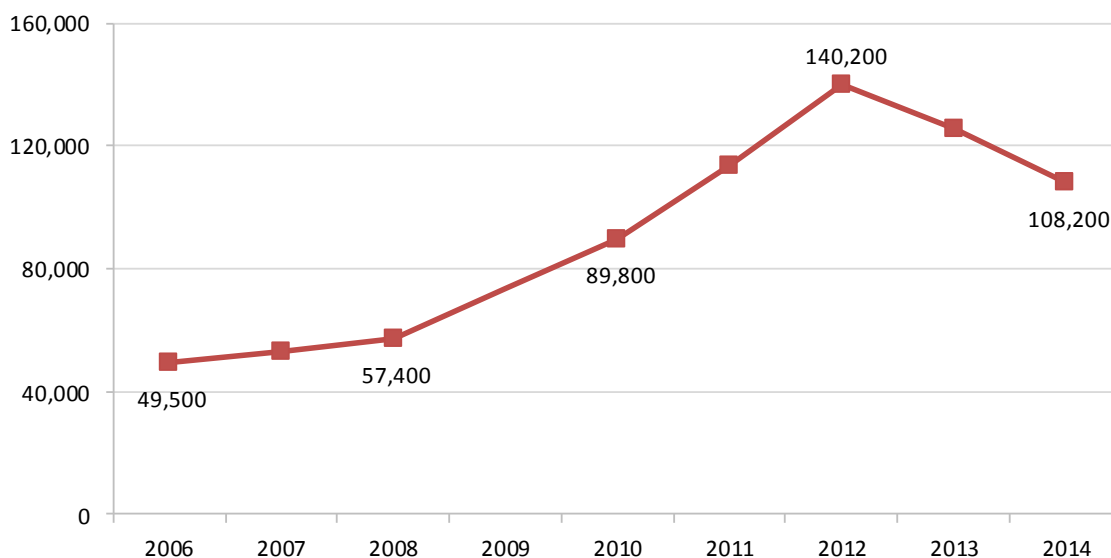
## 5.3. Vocational Education and Training (VET) students in the municipality

Vocational education and training (VET) student numbers declined for the second consecutive year. The decline in VET students follows a period of constant and substantial growth from 2006 up to 2012 where student numbers had increased by 183 per cent. The decline in VET student numbers can probably be attributed to cuts in government funding for TAFE’s across Victoria in 2012 and the crackdown on poor quality private providers through new visa application regulations. These two factors have resulted in the closure of some VET providers and therefore a decline in student numbers.

Overall VET student numbers living and/or studying in the municipality have changed significantly since 2006. However, the proportions of VET students that live and study, live but study outside or study only in the municipality have changed only slightly (no more than a 2 percentage point change) from year to year.

What’s evident is that VET students have a very high likelihood of living outside of the municipality while studying here. In 2006 almost nine in ten VET students (87 per cent) studied in the municipality while residing elsewhere and in 2014 this proportion had increased to 93 per cent.

**Figure 8 – Vocational education and training (VET) students living and/or studying in the municipality**



#### 5.4. English Language Intensive Courses for Overseas Students (ELICOS)

“English Language Intensive Courses for Overseas Students (ELICOS) programs have been designed for students who require English language training before commencing formal studies in Australia. There are other English language programs that a student can do, but the Australian government has an official ELICOS student visa especially for students who do one of these courses.” (ELICOS Australia: <http://www.elicos.com/about-elicos/>)

Data was not available for the City of Melbourne municipality, however Figure 9 provides the overall number of students commencing ELICOS studies both in Australia overall and those based in Victoria – providing a strong indicator for what can be assumed to have occurred in the municipality during the same time period.

Peaking slightly earlier than higher education overseas student numbers did in 2010, ELICOS students who commenced the course that they were enrolled in, peaked in 2009 and declined during 2010 and 2011 to then plateau from 2011 to 2012. This decline was primarily driven by a tightening of VISA regulations resulting in a decline in students commencing ELICOS courses and some providers leaving the industry.

There was a slight resurgence of ELICOS student numbers during 2013; commencements increased by 25 per cent in Victoria and by 20 per cent across Australia, due to a concerted effort by universities to re-establish international student enrolments. In 2014, ELICOS commencements almost reach the previous peak number of 2009. Victoria in 2014 had around 1000 fewer commencements compared to the peak recorded in 2009.

**Figure 9 – Victorian and Australian ELICOS students (commencements)**

