



UNIVERSITY EDUCATION IN CAIRNS

A Comparative Analysis

CUMMINGS ECONOMICS

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SUMMARY OF MAIN POINTS

- 1) Historically, for its size, Cairns was late receiving university campus development and previous reports have identified that university development was still much below regional averages.
- 2) The 2011 Census data provides an opportunity to review progress.
- 3) As a city, Cairns has passed seven other Australian regional cities in size since 1976. The city now stands as the ninth largest non-metropolitan centre and a comparatively large surrounding regional population adds to its immediate catchment area.
- 4) By comparison, 2011 Census data indicates that it has one of the lowest ratios of university students to population, especially in full-time students.
- 5) Comparison with other regional cities around the same size indicates room for full-time students to increase by about 80% to reach average levels, and for overall students (full-time and part-time) to increase by about 50%.
- 6) In the 2006 to 2011 period, growth in university student numbers as recorded by the census was 24% in the Cairns Local Government Area compared with 15% in the Townsville Local Government Area. However average across regional cities was 23%, and in total numbers, the increase in student numbers in Townsville was still more than in Cairns.
- 7) The relatively underdeveloped state of the campus is also indicated by the number of persons employed in higher education recorded by the census. Cairns' urban area had 477 persons employed in higher education or 3.6 per 1,000 population compared with a national average for the 24 cities listed of 7.7, and compared with Toowoomba 11.4, Townsville 9.0, Rockhampton 8.8, and Darwin 8.4, again indicating a capacity to more than double activity to bring it up to national averages.
- 8) Australian Government statistics on equivalent 'Full-Time Students Load' at universities compared with population of main cities covered, illustrates EFTSL's (Equivalent Full-Time Student Load) for Cairns Campus at 17.3 per 1,000 population compared with average for Charles Darwin at 42.4, Townsville Campus of JCU 49.7, Central Queensland University (including Brisbane Campus) 47.0, and University of Tasmania 65.0, indicating again that Cairns Campus is well below regional averages.
- 9) Cairns Campus' scope for growth in international students is even more marked with a rate of 1.6 per 1,000 population in Cairns compared with an average of the order of 17.4 across regional universities.
- 10) Queensland Tertiary Admissions Centre (QTAC) enrolments for 1st Semester 2012 indicates that enrolments per head of population at all universities by Far North Queensland residents at 5.0, is about 30% lower than State average of 8.4. Of the 5.0, only 2.3 enrolments were recorded at Cairns Campus per 1,000 of the region's population.
- 11) It is estimated that only 45% of students from Far North Queensland enrolling in university studies were enrolling at the Cairns Campus and, of the remaining 55%, only 13% were going to JCU's Townsville Campus, leaving 42% going elsewhere. By contrast, 73% of Townsville region students were enrolling at JCU Townsville Campus and only 27% going elsewhere. This indicates that the relatively underdeveloped state of the Cairns Campus is leading to a major leakage of students out of the northern regions, especially to Brisbane.

1. INTRODUCTION

1.1 BACKGROUND ON UNIVERSITY DEVELOPMENT IN THE CAIRNS REGION

Cairns as a city has experienced a strong average growth rate over the past 30 years of close to 3% per annum that has seen it pass in size seven other regional cities and move up from being 55% the size of Townsville in 1976 to 87% in 2011.

Table #1: Comparative Residential Populations Cairns & Other Regional Cities, 1976 & 2011

<u>City Statistical Sub Divisions</u>	<u>Est Residential Pop'n 2011</u>	<u>Growth 2001 – 2011</u>	
15 Darwin	129,062	22,220	
14 Cairns	146,477	33,545	
13 Townsville	167,636	33,563	
12 Geelong	174,086	14,583	
11 Hobart	215,042	17,760	
<u>City Statistical Sub Divisions</u>	<u>Pop'n (Est Residential) 1976</u>	<u>Pop'n (Est Residential) 2011</u>	<u>% Growth</u>
Cairns	49,590	146,477	+195%
Rockhampton	53,660	75,648	+41%
Bendigo	55,152	89,666	+63%
Orange/Bathurst	55,933	73,853	+32%
Albury Wodonga	63,409	103,909	+64%
Ballarat	68,450	95,007	+39%
Toowoomba	69,390	125,265	+81%
Launceston	81,636	107,746	+30%
Cairns	49,590	146,477	+195%
Townsville	90,540	167,636	+85%

Source: Cummings Economics from ABS data.

.Unfortunately at the time that major expansion of higher education facilities took place in the early 1970s through establishment of colleges of advanced education (that subsequently were converted to university campuses), Cairns was much smaller and not selected as a location.

However by the mid-1980s, a strongly growing Cairns had become the only city of its size in Australia without a university campus.

Following strong representations from the community and a Cummings Research report in the mid-1980s that compared Cairns' situation with other regional cities around Australia, the Queensland Minister for Education of the day instructed James Cook University to establish a Campus in Cairns. Initially this was delivered through facilities at the TAFE College. Strong community action and a community fund-raising led to the acquisition of the land at Smithfield in the late 1980s.

Since then progress has been slow, and a number of reports have indicated that Cairns remained well behind regional averages in student numbers compared with its population levels.

1.2 THIS RESEARCH NOTE

Each census provides an opportunity to review progress made over the intervening five-year period.

The following is designed to provide an analysis that:

- 1) Identifies the size and position of Cairns, and the region it services, in an Australia-wide context;
- 2) Identifies the degree to which Cairns is participating in the provision of university education compared with other cities and regions;
- 3) Identifies progress made over the past five years;
- 4) Identifies scope for progress in the future to bring university education in the region up to national averages.

1.3 SOURCES OF INFORMATION

The following analyses data from three main sources.

1. Australian Bureau of Statistics (ABS) census data on populations, student numbers and employment in higher education.
2. Statistical series produced by the Commonwealth Department of Industry, Innovation, Science, Research and Tertiary Education on enrolments at universities throughout Australia of both domestic and overseas students.
3. Statistical reports produced by the Queensland Tertiary Admissions Centre (QTAC) on annual enrolments at Queensland universities.

1.4 COMPARABLE UNIVERSITIES

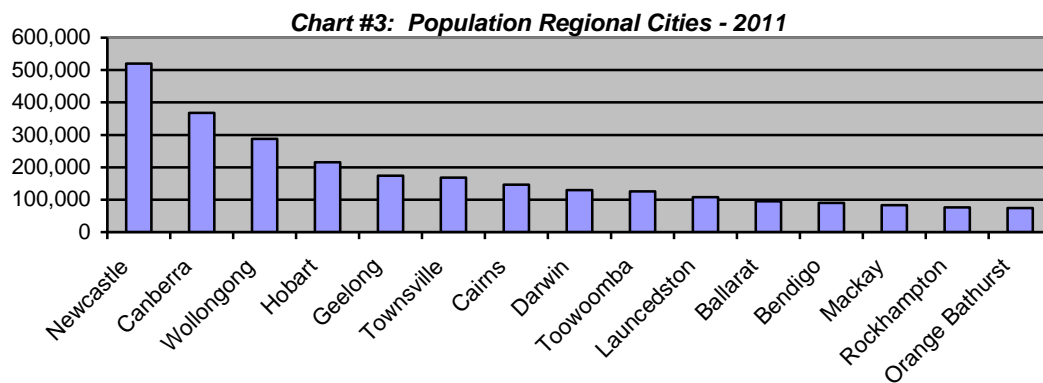
Most major universities are located in the metropolitan centres and are not strictly comparable. However the following table and chart gives size of relevant regional cities outside the metropolitan and metropolitan fringe areas ranked by size and university campus status.

Table #2: Regional City Populations 2011, & University Locations

	<u>City</u>	<u>Pop'n</u>	<u>University Status</u>
1	Newcastle	540,002	Base Campus
2	Canberra	367,304	2 Base Campuses & Australian Defence Force Academy
3	Wollongong	288,101	Base Campus
4	Hobart	215,042	Base Campus
5	Geelong	174,086	Base Campus
6	Townsville	167,636	Base Campus
7	Cairns	146,477	Sub Campus
8	Toowoomba	125,265	Base Campus
9	Darwin	129,062	Base Campus
10	Launceston	107,746	Campus & Australian Maritime College
11	Ballarat	195,007	Base Campus
12	Bendigo	189,666	Campus
13	Mackay	83,350	Campus
14	Rockhampton	75,648	Base Campus
15	Orange Bathurst	73,853	Campus CSU

Source : Cummings Economics & ABS Population data.

Chart 3 illustrates.



Cairns ranks 7th of this list of 15 cities.

It can be seen that for its size, Cairns stands out in not having a base campus.

Cairns is surrounded by a dense population and services the largest regional population in northern Australia.

The following table ranks statistical divisions by size and campus status.

Table #4: Non-Metropolitan Statistical Divisions – Estimated Residential Populations, 2011, & University Locations

	<u>Statistical Division</u>	<u>(Major City)</u>	<u>Pop'n</u>	<u>University</u>
1	Hunter, NSW	(Newcastle)	643,108	Newcastle Base
2	Illawarra, NSW	(Wollongong)	430,186	Wollongong Base
3	ACT	(Canberra)	319,317	ANU, Canberra, ADFA
4	Mid North Coast, NSW	(Port Macquarie/ Coffs Harbour)	306,822	Campus Newcastle, Campus SCU
5	Wide Bay/Burnett, Q'ld	(Bundaberg/ Hervey Bay)	279,201	Campus CQU, Campus USQ
6	Barwon, Vic	(Geelong)	284,193	Deakin Base
7	Far North, Q'ld	(Cairns)	265,945	Sub Campus JCU
8	Hobart & Southern, Tas	(Hobart)	253,666	UTAS Base
9	Richmond/Tweed, NSW	(Lismore)	236,557	SCU Base
10	Darling Downs, Q'ld	(Toowoomba)	232,745	USQ Base
11	Northern Territory	(Darwin)	231,331	CDU Base
12	Northern, Q'ld	(Townsville)	225,137	JCU Base
13	South Eastern, NSW	(Goulburn)	214,791	CSU School of Policing Studies
14	Fitzroy, Q'ld	(Rockhampton)	217,161	CQU Base
15	Goulburn Valley, Vic	(Shepparton)	206,756	Campus Latrobe
16	Northern, NSW	(Tamworth)	183,171	New England (UNE) nearby at Armidale Base
17	Central West, NSW	(Orange/Bathurst)	182,791	Campus CSU
18	Loddon, Vic	(Bendigo)	182,516	Campus Latrobe
19	Mackay, Q'ld	(Mackay)	171,297	Campuses CQU, JCU
20	Murrumbidgee, NSW	(Wagga)	154,273	Campus CSU
21	Central Highlands, Vic	(Ballarat)	156,137	Ballarat Base
22	Northern, Tas	(Launceston)	143,559	Campus UTAS/AMC
23	Murray, NSW	(Albury)	114,533	Campus CSU
24	NorthWest, NSW	(Dubbo)	117,347	Campus CSU
25	Mersey Lyell, Tas	(Devonport)	113,970	Campus UTAS

Note : Gold Coast and Sunshine Coast are treated as fringes of the Brisbane Metropolitan Area.

Source : Cummings Economics & ABS Population data.

The Far North Division (Cairns) ranks number 7 of this list of 25.

Again, Cairns stands out in terms of its population size and type of campus.

The following table compares the size of city and regional populations across the north. Again, Cairns Campus status stands out.

Table #5: Est Residential Population of Regions & Cities In North Australia, 2011

<u>Statistical Division</u>	<u>Pop'n</u>	<u>City</u>	<u>Pop'n</u>	<u>University Status</u>
Far North	265,945	Cairns	146,477	Campus
Northern	225,137	Townsville	167,636	Base Campus
Northern Territory	231,331	Darwin	129,062	Base Campus
Fitzroy	217,161	Rockhampton	75,648	Base Campus
Mackay	171,297	Mackay	73,853	Campus

Source : Cummings Economics & ABS Population data.

Distance to nearest metropolitan centre should also indicate a need for decentralised campus development. The following table illustrates.

Table #6: Some Relevant Distances* To Nearest Metropolitan Centre & Nearest Alternative Campus

	<u>To Nearest Metropolitan Centre</u>		<u>To Nearest Alternative Campus</u>	
Darwin -	Adelaide	2700 km	Cairns	1750 km
Cairns -	Brisbane	1450 km	Townsville	300 km
Townsville -	Brisbane	1100 km	Cairns	300 km
Mackay -	Brisbane	800 km	Rockhampton	300 km
Rockhampton -	Brisbane	500 km	Bundaberg	250 km
Toowoomba -	Brisbane	90 km	Brisbane	90 km
Lismore -	Brisbane	150 km	Gold Coast	80 km
Tamworth -	Sydney	300 km	Newcastle	200 km
Orange/Bathurst -	Sydney	180 km	Sydney	180 km
Wagga -	Sydney	300 km	Albury	120 km
Albury -	Melbourne	250 km	Wagga	120 km
Ballarat -	Melbourne	100 km	Melbourne	100 km
Launceston -	Melbourne	450 km	Hobart	150 km
Hobart -	Melbourne	600 km	Launceston	150 km

* Direct Distances approximate.

Source : Cummings Economics.

Travel facilities can also be relevant. For instance, as an island, Tasmania is at a disadvantage in not being able to access Melbourne by road.

In the north, as the major domestic and international air hub, Cairns has superior access to other centres in frequency of air services and availability of discount airfares compared with the other northern cities.

Once students make the decision to move away from their home region, there seems to be a tendency to consider centres further afield.

Cairns is a regional city servicing a non-metropolitan market. In analysing its university performance, by and large, it is appropriate to compare it with other non-metropolitan university campuses. Most of these are generally served by one institution only. This in itself has led to some decisions about whether a centre is effectively part of a metropolitan area or not. In this type of analysis, Gold Coast and Sunshine Coast have been treated as being part of the Queensland metropolitan area.

Some of the regional areas are also more like the Cairns situation than others, especially in scale of population. The following lists a number of institutions for special comparative analysis.

- Charles Darwin University – CDU
- James Cook University – JCU
- Central Queensland University - CQU
- University of Southern Queensland – USQ
- Southern Cross University – SCU
- University of New England – UNE
- Charles Sturt University – CSU
- University of Ballarat – UB
- University of Tasmania – UTAS

By and large, regional populations are so small in Western Australia and South Australia that university structures in those states are not very relevant to the Cairns situation.

2. ANALYSIS OF UNIVERSITY STUDENT NUMBERS (CENSUS DATA) – RATIOS TO POPULATION

2.1 INTRODUCTION

Census 2011 data records population by usual place of residence (UPR) attending education establishments, including university, TAFE and secondary levels.

Populations of university age, can be heavily affected by the presence of university campuses.

While secondary school numbers can also be affected by presence or non-presence of boarding schools, the effect is more marginal, and the number of secondary school students in a region is a good indication of the relative population of a region relevant to the demand for higher education.

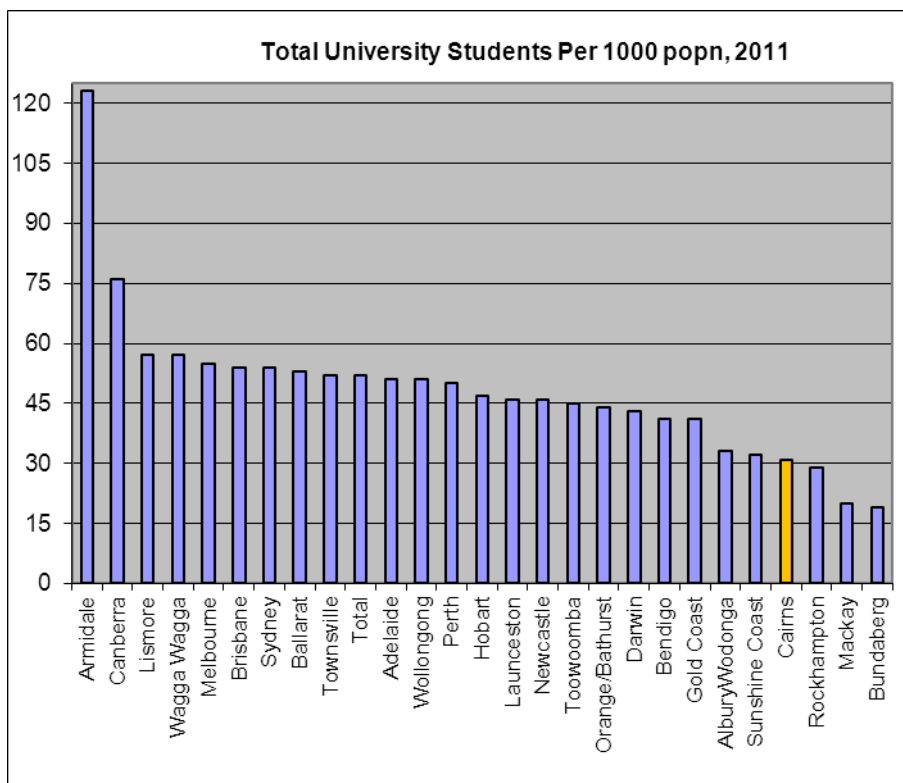
The following tables give ratios of university students in relevant cities compared with total census count of population by usual place of residence, and by whether the university students were full-time, part-time or total.

2.2 COMPARISON OF UNIVERSITY STUDENTS WITH POPULATION

Tables #7, #8 and #9 give comparisons of university students with population – total, full-time and part-time from census count data by usual place of residence for a range of significant urban areas (SUA's).

Table #7 – Total University Students per 1,000 Population

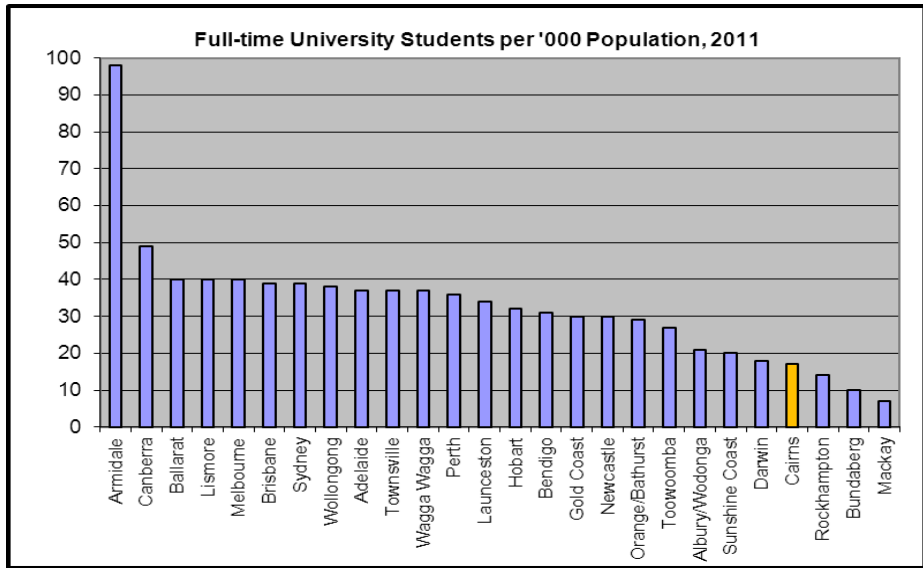
Area	Uni/Pop'n Total/000
Armidale	123
Canberra	76
Lismore	57
Wagga Wagga	57
Melbourne	55
Brisbane	54
Sydney	54
Ballarat	53
Townsville	52
Total	52
Adelaide	51
Wollongong	51
Perth	50
Hobart	47
Launceston	46
Newcastle	46
Toowoomba	45
Orange/Bathurst	44
Darwin	43
Bendigo	41
Gold Coast	41
Albury/Wodonga	33
Sunshine Coast	32
Cairns	31
Rockhampton	29
Mackay	20
Bundaberg	19



Source : Cummings Economics from ABS Census (UPR) data, 2011.

Table #8 – Full-Time University Students per 1,000 Population

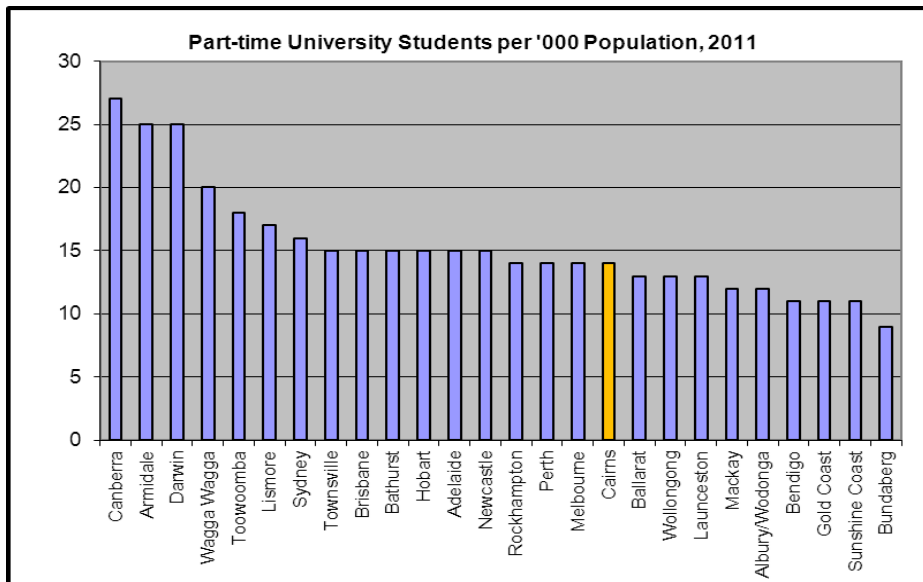
Area	Uni FT Total
Armidale	98
Canberra	49
Lismore	40
Melbourne	40
Ballarat	40
Brisbane	39
Sydney	39
Wollongong	38
Wagga Wagga	37
Townsville	37
Adelaide	37
Perth	36
Launceston	34
Hobart	32
Bendigo	31
Newcastle	30
Gold Coast	30
Orange/Bathurst	29
Toowoomba	27
Albury/Wodonga	21
Sunshine Coast	20
Darwin	18
Cairns	17
Rockhampton	14
Bundaberg	10
Mackay	7
Total	36



Source : Cummings Economics from ABS Census (UPR) data, 2011.

Table #9 – Part-Time University Students per 1,000 Population

Area	Uni PT Total
Canberra	27
Armidale	25
Darwin	25
Wagga Wagga	20
Toowoomba	18
Lismore	17
Sydney	16
Townsville	15
Brisbane	15
Bathurst	15
Hobart	15
Adelaide	15
Newcastle	15
Rockhampton	14
Perth	14
Melbourne	14
Cairns	14
Ballarat	13
Wollongong	13
Launceston	13
Mackay	12
Albury/Wodonga	12
Bendigo	11
Gold Coast	11
Sunshine Coast	11
Bundaberg	9
Total	15



Source : Cummings Economics from ABS Census (UPR) data, 2011.

It can be seen from Table #7, that despite Cairns' relatively large size in the scale of Australian regional cities, total student numbers per 1,000 head of population at 31 is very low and well below the average shown of 52.

However Tables #8 and #9 indicate that the low numbers in Cairns are due to low levels of full-time students. Ratio of part-time students is not that far behind national averages.

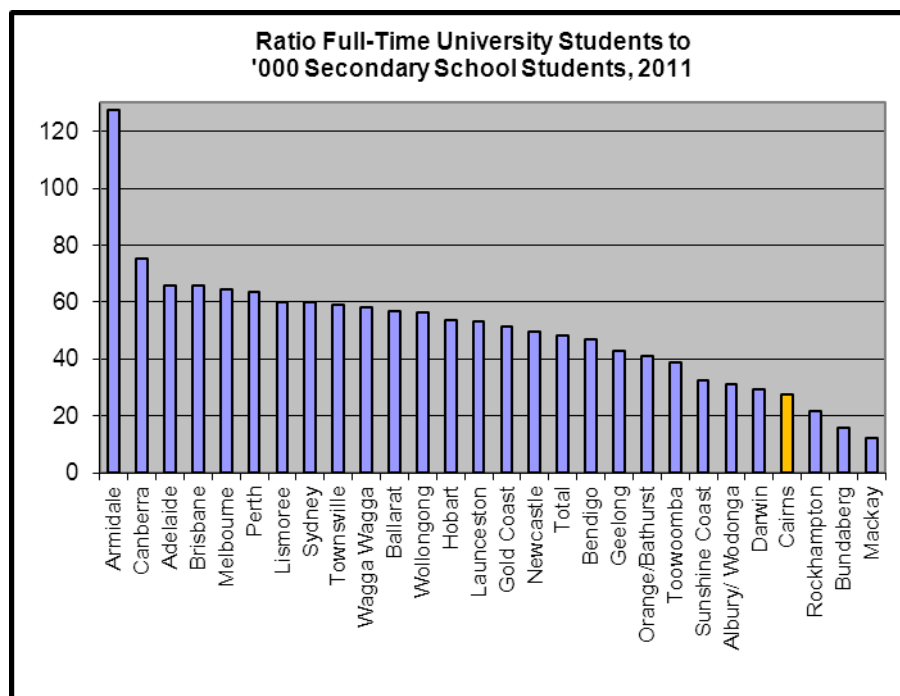
University Students per 1,000 Population

	Cairns	National Average
Full-time.....	17	36
Part-time.....	14	15
Total.....	31	52

This low penetration of the full-time student market is confirmed by Table #10 showing ratio of full-time students to secondary school students.

Table #10 – Ratio Full-Time University Students to 1,000 Secondary School Students

Area	Uni/ Secondary
Armidale	127.6
Canberra	75.2
Adelaide	65.9
Brisbane	65.7
Melbourne	64.7
Perth	63.8
Lismoree	59.8
Sydney	59.8
Townsville	58.9
Wagga Wagga	58.4
Ballarat	57.0
Wollongong	56.3
Hobart	53.5
Launceston	53.2
Gold Coast	51.6
Newcastle	49.7
Total	48.4
Bendigo	46.8
Geelong	42.8
Orange/Bathurst	41.0
Toowoomba	38.8
Sunshine Coast	32.6
Albury/ Wodonga	31.2
Darwin	29.6
Cairns	27.8
Rockhampton	21.7
Bundaberg	15.7
Mackay	12.3



Source : Cummings Economics from ABS Census (UPR) data, 2011.

Thus, prima facie evidence from the foregoing data is that Cairns has the potential, if provided with equivalent national average university services, to more than double in full-time students from about 17 to 36 per thousand and the potential to substantially raise total student numbers from 31 per 1,000 to 52 per 1,000, a rise of 67%.

The following shows ratios per thousand head of population for the cities around Cairns' size.

	<u>Total</u>	<u>Full-time</u>	<u>Part-time</u>
Hobart	4.7	3.2	1.5
Townsville	5.2	3.7	1.5
Toowoomba	4.5	2.7	1.9
Darwin	4.3	2.5	1.8
Launceston	4.6	3.4	1.3
Simple average of 5 cities	4.7	3.1	1.6
cf Cairns	3.1	1.7	1.4

This table tends to indicate a potential for full-time student numbers, usual place of residence Cairns, to increase by about 82% and overall student numbers in total, increase by about 52%.

3. ANALYSIS OF STUDENT NUMBERS GROWTH 2006 – 2011, ABS DATA

The following table analyses growth in student numbers by 2006 – 2011 according to census data.

Growth figures readily available are by place of enumeration (although comparison with usual place of residence indicates only minor differences).

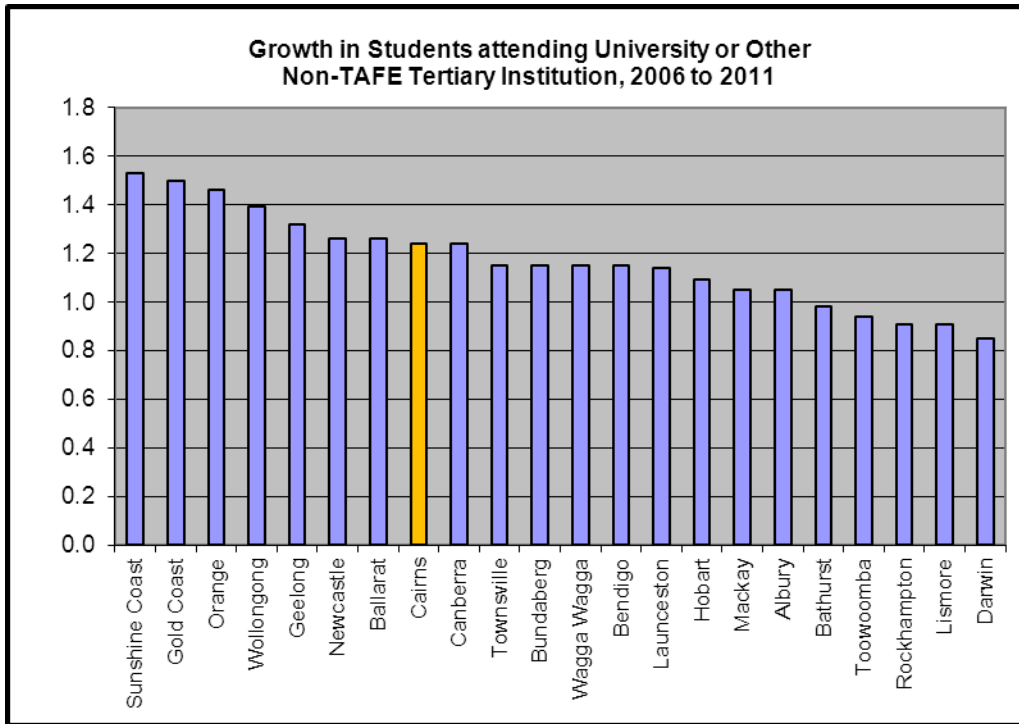
They are also not readily available for significant urban areas and the following table gives data for city local government areas.

Table #11 – Growth in Students Attending University or Other Non TAFE Tertiary Institution, 2006 – 2011, Census & Population

	<u>Place of Enumeration</u>						
	<u>University students</u>			<u>Population</u>			<u>Diff Gwth Factor</u>
	<u>2006 No.</u>	<u>2011 No.</u>	<u>Gwth Factor</u>	<u>2006 No.</u>	<u>2011\ No.</u>	<u>Gwth Factor</u>	
Darwin	3,860	3,274	0.85	75,545	80,484	1.07	-0.22
Cairns	3,603	4,474	1.24	165,014	180,569	1.09	0.15
Townsville	7,844	9,058	1.15	160,142	178,375	1.11	0.04
Mackay	1,735	1,821	1.05	101,441	111,253	1.10	-0.05
Rockhampton	3,026	2,742	0.91	103,136	110,582	1.07	-0.16
Bundaberg	1,281	1,476	1.15	91,275	85,109	0.93	0.22
Toowoomba	5,715	5,393	0.94	141,887	149,927	1.06	-0.11
Sunshine Coast	6,071	9,303	1.53	293,905	319,094	1.09	0.45
Gold Coast	14,224	21,329	1.50	469,736	520,686	1.11	0.39
Newcastle	8,696	10,969	1.26	141,871	149,219	1.05	0.21
Wollongong	8,489	11,824	1.39	183,632	192,048	1.05	0.35
Lismore	2,375	2,152	0.91	42,613	42,907	1.01	-0.10
Orange	787	1,148	1.46	34,968	38,571	1.10	0.36
Bathurst	2,628	2,571	0.98	36,218	38,857	1.07	-0.09
Wagga Wagga	3,197	3,690	1.15	57,601	60,216	1.05	0.11
Albury	1,761	1,845	1.05	46,664	47,776	1.02	0.02
Canberra	22,930	28,326	1.24	327,899	360,550	1.10	0.14
Bendigo	3,491	4,010	1.15	92,147	99,388	1.08	0.07
Ballarat	4,115	5,183	1.26	84,656	92,711	1.10	0.16
Geelong	5,913	7,822	1.32	194,346	208,469	1.07	0.25
Hobart	4,982	5,432	1.09	48,842	50,276	1.03	0.06
Launceston	3,074	3,500	1.14	62,413	64,510	1.03	0.10
	119,797	147,342	1.23	2,955,951	3,181,577	1.08	0.15

Source : Cummings Economics from ABS Census data, 2011.

Chart #12 illustrates.



Source : Cummings Economics from ABS Census data, 2011.

The table/chart indicates that although Cairns' growth was strong, it was in large part due to population growth.

Reference to Table #11 indicates that although Cairns' growth in student numbers 2006 to 2011 was higher than Townsville in percentage terms, the change in actual numbers was:

Cairns..... 871;

Townsville 1204;

indicating that Cairns' numbers were less in absolute terms.

4. EMPLOYMENT IN HIGHER EDUCATION – CENSUS DATA

Census data at ANZSIC Code 4 Digit level gives employment in higher education. This is a prime indication of comparative university level activity. The following table and chart gives figures for 2011 Census for Significant Urban Areas Employment in higher education and employment per 1,000 population.

Table #13 – Employment in Higher Education, 2011 Census, & Ratio per 1,000 Population Usual Place of Residence

<u>SUA</u>	<u>Employment</u>	<u>Employment per 1,000 pop'n</u>
Sydney	25,918	6.4
Melbourne	32,797	8.5
Brisbane	15,838	8.0
Perth	12,460	7.5
Adelaide	9,927	8.3
Gold Coast /Tweed	2,679	4.8
Canberra/Queenbeyan	6,062	15.5
Newcastle/Maitland	2,872	9.6
Sunshine Coast	896	3.3
Wollongong	2,678	10.0
Hobart	1,790	9.0
Geelong	1,446	8.4
Townsville	1,465	9.0
Cairns	477	3.6
Darwin	893	8.4
Toowoomba	1,179	11.4
Ballarat	868	9.4
Bendigo	450	5.2
Launceston	704	8.6
Albury/Wodonga	372	4.5
Mackay	90	1.2
Rockhampton	653	8.8
Orange/Bathurst	680	9.6
Total	123,194	7.7

Note : Relatively low figures for Sunshine Coast would reflect, in part, the relatively high population 65+.

Source : Cummings Economics from ABS 2011 Census of Population & Housing.

Average for the cities less than 200,000 was 7.5.

Cairns' ratio at 3.6 is less than half the average and compares with some other comparable cities (significant urban areas) as follows:

Townsville	9.0
Hobart	9.0
Rockhampton	8.8
Launceston.....	8.6
Darwin	8.4
Cairns.....	3.6

5. STUDENT NUMBERS BY REGIONAL INSTITUTIONS – AUSTRALIAN GOVERNMENT DATA

5.1 TOTAL STUDENTS

The following analyses overall numbers at universities by institutions in terms of Equivalent Full Time Student Loads (EFTSL's), ie total student load recorded by the Department of Industry, Innovation, Science, Research and Tertiary Education (DISRTE). This means that the figures for part-time students are rendered into Equivalent Full-Time Student Units (EFTSL's).

The following summarises for a number of key regional institutions and compares with the city population of the main cities served by that institution.

Table #14 – Total EFTSL Numbers (2011) By Regional Universities to Population URL/SVA

<u>Uni</u>	<u>EFTSL</u>	<u>Main Cities</u>	<u>Pop'n City 2011</u>	<u>Pop'n Combined Cities</u>	<u>EFTSL's/'000 Pop'n</u>
U of NE	9,829	Tamworth Armidale	38,735 22,468	61,203	160.6
U of B	8,794	Ballarat	91,801	91,801	95.8
CSU	21,340	Orange Bathurst Wagga Albury/Wodonga Dubbo	70,947 52,042 82,083 33,997	239,069	89.3
U of SQ	13,391	Toowoomba Hervey Bay	105,984 48,680	154,664	86.6
SCU	9,587	Tweed Heads Lismore Coffs Harbour	44,246 28,285 45,580	118,111	81.2
U of TAS	18,412	Hobart Launceston	200,944 82,220	283,164	65.0
JCU	14,238	Cairns Townsville	133,911 162,292	296,203	48.1
CQU	12,228	Rockhampton Gladstone Mackay Bundaberg	73,681 41,966 77,293 67,341	260,281	47.0
CDU	4,509	Darwin	106,255	106,255	42.4
Total	112,328			1,610,751	69.7

Source : Cummings Economics from DISRTE Statistics & ABS Population data. (Significant Urban Area by Place of Usual Residence)

EFTSL James Cook Campuses were split in 2011 :-

Cairns	2,323	16%
Townsville	8,493	60%
Other	3,394	24%
Total.....	14,210	100%

EFTSL to '000 Pop'n

Cairns.....	17.3
Townsville	52.3

The indications are that compared with populations of the cities serviced, Charles Darwin, CQU, JCU and Uni of Tas have a total ratio of EFTSL to city population lower than the others.

Cairns Campus at 17.3 is about a quarter of the average for this group (69.7) and well below Darwin (42.4). The indications are that a tripling of student EFTSL's in Cairns would bring it up to about JCU Townsville, CQU and University of Tasmania. (Note: CQU figures are boosted by some campuses in cities other than Central Queensland.)

5.2 DOMESTIC STUDENTS

The following gives DISTRE Data of total student load by institution for domestic and international students.

The following gives regional universities by population size and the domestic student EFTSL's for the university associated with them.

Table #15 – Domestic Student (EFTSL's), Regional Universities, 2011

<u>Institution</u>	<u>Pop'n Combined Cities</u>	<u>Domestic EFTSL's</u>	<u>EFTSL's/ Per '000 Pop'n</u>
U of NE	61,203	8,954	146.3
CSU	239,069	18,116	75.8
U of SQ	154,664	9,984	64.5
SCU	118,111	7,506	63.4
U of B	91,801	4,697	51.2
U of TAS	283,164	12,447	44.0
CDU	106,255	4,020	37.8
JCU	296,203	9,655	32.6
CQU	260,281	6,883	26.4
Total	1,610,751	82,262	51.1

Source : Cummings Economics from DISTRE Statistics & ABS Population data.

JCU records lower figures along with Charles Darwin, University of Tasmania and CQU. (Note: CQU figures are boosted by some campuses in cities other than Central Queensland.)

Break up of JCU figures between Cairns and Townsville Campuses is as follows.

Table #16 – Domestic Student (EFTSL's), Cairns & Townsville Campuses, 2011

	<u>City Pop'n</u>	<u>JCU Campus Domestic EFTSL's</u>	<u>JCU Campus EFTSL/Per '000 Pop'n</u>
Townsville	162,292	7,487	46.1
Cairns	133,911	2,108	15.7

Source : Cummings Economics from JCU "Facts & Figures" & ABS population data.

For the size of the city, Cairns is extremely low. The indications are that there would be a potential to more than double the domestic student EFTSL's to bring them up to other equivalent regional university levels given the city's population size.

5.3 INTERNATIONAL STUDENTS

The following **Table #17** gives ratio of number of international student EFTSL's as a proportion of population.

They indicate JCU has a low level of international students overall and especially for the Cairns Campus.

Regional universities with high proportion of international students are Central Queensland, University of Ballarat and the University of Southern Queensland which are in the top 10 in Australia. Regional universities with middle ranking ratios are Charles Sturt and Southern Cross.

Table #17 – International Students, 2011

<u>Institution</u>	<u>Combined City Pop'n</u>	<u>International EFTSL's (1)</u>	<u>International EFTSL's Per '000 Pop'n</u>
U of B	91,801	4,096	44.6
CQU	260,281	5,346	20.5
U of SQ	154,664	3,407	20.2
SCU	118,111	2,081	17.6
U of TAS	283,164	3,965	14.0
CSU	239,069	3,224	13.5
JCU	296,203	4,582	10.5
U of NE	61,203	874	7.3
CDU	106,255	489	4.6
Total	1,610,751	28,064	17.4

(1) Note : For some universities, the figures include offshore campuses.

Source : Cummings Economics from DISTRE Statistics & ABS Population data.

Break up for JCU for 2011 is :-

	<u>Students</u>	<u>Pop'n</u>	<u>Per '000 Pop'n</u>
<u>Cairns</u>	215.....	133,911.....	1.6
<u>Townsville</u>	1,005.....	162,292.....	6.2

JCU, U of NE and CDU are low. Cairns Campus is extremely low.

The following **Table #18** gives ratio of international to domestic EFTSL's.

Table #18 – Ratio of International to Domestic EFTSL's, 2011

<u>Institution</u>	<u>Ratio Int/Dom EFTSL's</u>
U of B	0.87
CQU	0.78
JCU	0.44
U of SQ	0.34
U of Tas	0.32
SCU	0.28
CSU	0.18
CDU	0.12
U of NE	0.10
Total	0.34

Source : Cummings Economics from DEST Statistics & ABS Population data.

By comparison, Cairns Campus ratio is 0.10. Thus, not only is Cairns Campus low in domestic students, in ratio of international to domestic students, it is low. The Campus has potential to expand at least four-fold to bring it up towards regional averages.

6. UNIVERSITY COMMENCING ENROLMENTS QUEENSLAND – QTAC DATA

6.1 ALL ENROLMENTS

The following analyses Queensland Tertiary Admissions Centre (QTAC) enrolments by institution by region of permanent residence, 1st Semester 2012.

Table #19 – QTAC Enrolments, 1st Semester 2012

Institution	Region of Permanent Residence									TOTAL
	SW	NW/ CW	FN	NQ	MAC	FITZ	DD	WBB	BRIS/ M'TON	
Bond	-	1	8	3	-	7	3	5	210	237
ACU	-	2	5	2	2	2	14	8	887	922
CQU	8	19	97	144	315	632	58	353	850	2484
Griffith	-	7	69	43	41	48	92	80	5000	5389
JCU	3	46	771	1149	143	66	40	31	147	2396
QUT	20	8	116	49	42	86	154	142	7689	8306
SCU	-	-	2	1	1	4	8	6	262	282
U of NE	2	2	4	-	1	4	9	4	25	51
U of Q	27	24	142	49	90	118	280	176	6345	7251
U of SQ	18	11	37	38	32	41	566	206	904	1850
U of SC	3	1	15	7	9	14	30	137	1661	1877
TAFE/sundry other										
Total	91	125	1319	1569	693	1056	1295	1232	27179	37369
Est Attended Uni in Own Region	na	na	600 *	1149	na	632	566	na	21792	
% of Total from Region	na	na	47%	73%	na	60%	44%	na	80%	
Reg Pop'n, 2011	26530	47342	265945	225137	171297	217161	232745	279201	3008780	4474098
Overall Enrolm't per '000 Pop'n	3.5	2.6	5.0	7.0	4.0	4.9	5.6	4.4	9.0	8.4
Local Campus Enrolment per '000 Pop'n	na	na	2.3	5.1	na	2.9	2.4	na	7.2	na

* Estimated QTAC enrolments JCU Cairns Campus. It implies that of the QTAC enrolments at JCU of 771, some 600 were at Cairns and 171 Townsville, ie. about 80% Cairns, 20% Townsville.

Source : Cummings Economics from QTAC Data & ABS Population data.

What is clear from this table, is that the ratio of overall university QTAC enrolments to population recorded in the Cairns/Far North region is lower at 5.0 compared with Townsville/North (7.0), Darling Downs (5.6), Brisbane/Moreton (9.0) and State average (8.4). Mackay and Wide Bay/Burnett are also low and Fitzroy similar to the Cairns region.

The figure for enrolling at a local campus is low for the Far North. While it is low for the Toowoomba/Darling Downs region, many are going from this area to institutions in the Brisbane/Moreton region and vice versa.

The indications are that per capita enrolments by FNQ residents are still low compared with the Northern and Darling Downs regions, with potential to improve with further development of the local campus.

The following gives estimated enrolments of Cairns/Far North originating students by where enrolled.

Table #20 – FNQ Resident Enrolments – Where Enrolled. 2012

<u>Institution</u>	<u>No.</u>	<u>%</u>
Local JCU Cairns Campus	600 *	45%
JCU Townsville Campus	171 *	13%
Brisbane/Moreton Campuses ⁽¹⁾	⁽¹⁾ 355	⁽¹⁾ 27%
Other Campuses ⁽¹⁾	⁽¹⁾ 193	⁽¹⁾ 15%
Total	1319	100%

⁽¹⁾ Note: TAFE and sundry campuses are included in 'other'.

* Note: See note re assumptions about split in previous table.

Source : Cummings Economics from QTAC data.

Thus, only about 47% are attending the local campus and 53% are going away. The indications are that the majority of those going away are going to other campuses further afield (42%) and only a minority (13%) are going to JCU Townsville.

This compares with the Townsville/Northern enrolment.

Table #21 – NQ Resident Enrolments – Where Enrolled, 2012

<u>Institution</u>	<u>No.</u>	<u>%</u>
Local JCU Townsville Campus	1149	73%
Brisbane/Moreton Campuses ⁽¹⁾	⁽¹⁾ 153	⁽¹⁾ 10%
Other Campuses ⁽¹⁾	⁽¹⁾ 267	⁽¹⁾ 17%
Total	1569	100%

⁽¹⁾ Note: TAFE and sundry campuses are included in 'other'.

Source : Cummings Economics from QTAC data.

Some 73% in this region go to the local campus.

The figures indicate that JCU as an institution is losing substantial numbers of Cairns region students to Brisbane/Moreton campuses because of the comparative underdevelopment of the Cairns Campus.

Given Cairns' distance from Brisbane, equivalent facilities to those in Townsville would seem likely to result in an increase of students enrolling in the local Campus of about 50%, ie. from about 45% to about 70%.