



# UNIVERSITY EDUCATION IN CAIRNS

## Analysis of Trends & Prospects

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## SUMMARY OF MAIN POINTS

- 1) For its current 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 large surrounding regional population adds to its position.
- 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 a room for full time students to increase by 80% to reach average levels and for overall students to increase by 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, where Cairns urban area at 477 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. Darwin 8.4, again indicating a capacity to more than double activity to bring 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 for Cairns campus at 18.5 per 1,000 population compared with average for Charles Darwin at 42.4, Townsville Campus of JCU 49.7, Central Queensland University 47.0, 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 13.9 at Townsville and an average of the order of 17.4 across regional universities.
- 10) Queensland Tertiary Admissions Centre (QTAC) enrolments for 1<sup>st</sup> semester 2012 indicates that enrolments per head of population at universities from Far North Queensland is 30% lower than state averages. Only 2.3 enrolments were recorded at Cairns Campus per 1,000 of the region's population.
- 11) 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**

| City Statistical Sub Divisions | Est Residential Pop'n 2011 | Growth 2001 – 2011 |  |
|--------------------------------|----------------------------|--------------------|--|
| 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             |  |

| City Statistical Sub Divisions | Pop'n (Est Residential) 1976 | Pop'n (Est Residential) 2011 | % Growth     |
|--------------------------------|------------------------------|------------------------------|--------------|
| 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%         |
| <b>Cairns</b>                  | <b>49,590</b>                | <b>146,477</b>               | <b>+195%</b> |
| <b>Townsville</b>              | <b>90,540</b>                | <b>167,636</b>               | <b>+85%</b>  |

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 ordered 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 1980's.

Since then progress has been slow, and a number of reports, including by Cummings Economics, 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

## 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 Education, Employment and Workplace Relations (DEEWR) 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.

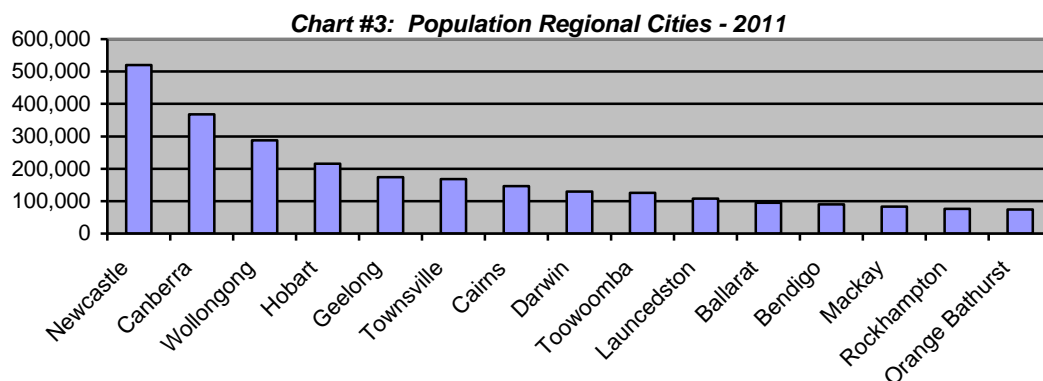
## 1.4 COMPARABLE UNIVERSITIES

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.

| <b>Table #2: Regional City Populations 2011, &amp; University Locations</b> |                 |                |  |
|---|-----------------|----------------|--|
|   | <b>City</b>     | <b>Pop'n</b>   | <b>University Status</b>                           |
| 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  |
| <b>7</b>  | <b>Cairns</b>   | <b>146,477</b> | <b>Campus</b>                                      |
| 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 7<sup>th</sup> 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.

| <b>Table #4: Non-Metropolitan Statistical Divisions – Estimated Residential Populations, 2011, &amp; University Locations</b> |                             |                                    |                |  |
|---|-----------------------------|------------------------------------|----------------|--|
|   | <b>Statistical Division</b> | <b>(Major City)</b>                | <b>Pop'n</b>   | <b>University</b>                            |
| 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/<br>Coffs Harbour) | 306,822        | Campus Newcastle,<br>Campus SCU              |
| 5   | Wide Bay/Burnett, Q'ld      | (Bundaberg/<br>Hervey Bay)         | 279,201        | Campus CQU,<br>Campus USQ                    |
| 6   | Barwon, Vic                 | (Geelong)                          | 284,193        | Deakin Base                                  |
| <b>7</b>  | <b>Far North, Q'ld</b>      | <b>(Cairns)</b>                    | <b>265,945</b> | <b>Campus JCU</b>                            |
| 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<br>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.

| Statistical Division | Pop'n   | City        | Pop'n   | University Status |
|----------------------|---------|-------------|---------|-------------------|
| 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.

|                 | To Nearest Metropolitan Centre |         | To Nearest Alternative Campus |         |
|-----------------|--------------------------------|---------|-------------------------------|---------|
| 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.

Source : Cummings Economics.

## 2. COMPARATIVE ANALYSIS OF CAIRNS CAMPUS & OTHER UNIVERSITIES AROUND AUSTRALIA

### 2.1 SOURCES OF INFORMATION & ANALYTICAL APPROACH

There are over 40 separate institutions in Australia recorded by Commonwealth Department of Education, Science & Training statistics as being universities, with many of them operating a number of campuses in different locations.

A list of institutions and campuses is given in [Appendix 1](#).

In large part, the individual institutions and their campuses are based on servicing a defined geographical market.

This applies especially to part-time students, although some of these can be taking correspondence (external studies) type courses.

It also applies to the majority of full-time students who will tend to study in their home city or region. However, substantial numbers of full-time students will study at locations away from their home region.

This, of necessity, applies to students from towns, cities and areas where there is no university campus or where the campus does not offer the course they wish to take.

Students will also move away from their home region :-

- To gain university entry if their scores are not high enough to gain entry to institutions in their home area, or
- To seek to study at an institution they perceive as providing a higher quality product.

Analysis is further complicated by availability of statistics, especially lack of data down to campus level in the major Commonwealth statistics.

The following analysis is based on looking at the statistics available. These are mainly contained in three series :-

- ABS census data on attendance at education establishments.
- Commonwealth Department of Education, Science & Training (DEST) higher education statistics.
- Queensland Tertiary Admissions Centre (QTAC) published data.

This was supplemented for this study by James Cook University data on split between Cairns and Townsville Campuses.

In comparing population serviced, estimated residential populations are used at two levels – individual cities, and regional statistical divisions.

Identification of catchment areas serviced is quite complex and there is a real question about whether the city population or regional population serviced should be used. For part-time students, the city population is most relevant. However, for full-time students, the population in the city and surrounding regional areas is probably most relevant.

In the following analysis, we have used both as seemed appropriate.



In practice, it is fairly normal for the size of the regional city to reflect, to some degree, its hinterland population.

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 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.

## 2.2 REGIONAL POPULATIONS & UNIVERSITY DEVELOPMENT IN AUSTRALIA

Appendix 2 gives comparative regional residential populations including selected regional cities as at 2007.

The following ranks major regional (non-metropolitan) statistical division populations and shows universities located in them. Divisions listed have a population of 100,000 plus.

| <b>Table #1 – Non-Metropolitan Statistical Divisions – Estimated Residential Populations, 2007, &amp; University Locations</b> |                             |                                    |                |   |
|--|-----------------------------|------------------------------------|----------------|---|
|  | <b>Statistical Division</b> | <b>(Major City)</b>                | <b>Pop'n</b>   | <b>University</b>                       |
| 1  | Hunter, NSW                 | (Newcastle)                        | 624,276        | Newcastle                               |
| 2  | Illawarra, NSW              | (Wollongong)                       | 417,901        | Wollongong                              |
| 3  | ACT                         | (Canberra)                         | 339,865        | ANU, Canberra, ADFA                     |
| 4  | Mid North Coast, NSW        | (Port Macquarie/<br>Coffs Harbour) | 300,006        | Campus Newcastle,<br>Campus SCU         |
| 5  | Wide Bay/Burnett, Q'ld      | (Bundaberg/<br>Hervey Bay)         | 275,634        | Campus CQU,<br>Campus USQ               |
| 6  | Barwon, Vic                 | (Geelong)                          | 273,619        | Deakin                                  |
| <b>7</b>   | <b>Far North, Q'ld</b>      | <b>(Cairns)</b>                    | <b>253,721</b> | <b>Campus JCU</b>                       |
| 8  | Hobart & Southern, Tas      | (Hobart)                           | 243,858        | UTAS                                    |
| 9  | Richmond/Tweed, NSW         | (Lismore)                          | 232,948        | SCU                                     |
| 10   | Darling Downs, Q'ld         | (Toowoomba)                        | 229,246        | USQ                                     |
| 11   | Northern Territory          | (Darwin)                           | 214,975        | CDU                                     |
| 12   | Northern, Q'ld              | (Townsville)                       | 214,295        | JCU                                     |
| 13   | South Eastern, NSW          | (Goulburn)                         | 209,270        | CSU School of Policing Studies          |
| 14   | Fitzroy, Q'ld               | (Rockhampton)                      | 204,537        | CQU                                     |
| 15   | Goulburn Valley, Vic        | (Shepparton)                       | 204,254        | Campus Latrobe                          |
| 16   | Northern, NSW               | (Tamworth)                         | 180,067        | New England (UNE) nearby at<br>Armidale |
| 17   | Central West, NSW           | (Orange/Bathurst)                  | 178,840        | Campus CSU                              |
| 18   | Loddon, Vic                 | (Bendigo)                          | 177,340        | Campus Latrobe                          |
| 19   | Mackay, Q'ld                | (Mackay)                           | 163,127        | Campuses CQU, JCU                       |
| 20   | Murrumbidgee, NSW           | (Wagga)                            | 154,663        | Campus CSU                              |
| 21   | Central Highlands, Vic      | (Ballarat)                         | 149,231        | Ballarat                                |
| 22   | Northern, Tas               | (Launceston)                       | 139,446        | Campus UTAS/AMC                         |
| 23   | Murray, NSW                 | (Albury)                           | 116,471        | Campus CSU                              |
| 24   | NorthWest, NSW              | (Dubbo)                            | 115,419        | Campus CSU                              |
| 25   | Mersey Lyell, Tas           | (Devonport)                        | 110,017        | 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.

Five of the regions above Far North Queensland (FNQ) in size have well established stand alone universities (the ACT has 2 plus the Defence Force Academy).

Exceptions are :-

- Wide Bay Burnett, Q'ld, that (as its name suggests) is really composed of two distinct smaller discrete regions, Wide Bay (Maryborough/Hervey Bay) and Burnett (Bundaberg), each city being much smaller than Cairns.
- Mid North Coast, NSW, that is composed of a number of coastal river valley communities north of Newcastle. Port Macquarie and Coffs Harbour have populations in the 40,000 to 50,000 range.

Of the next nine statistical divisions, all smaller in population than the Cairns region, seven have well established base university campuses :-

- Richmond Tweed, NSW – Southern Cross University based in Lismore, population 30954, about one-quarter the size of Cairns.
- Darling Downs, Q'ld – University of Southern Queensland based in Toowoomba.
- Northern, Q'ld – James Cook University based in Townsville.
- Northern Territory – Charles Darwin University based in Darwin.
- Fitzroy, Q'ld – Central Queensland University based in Rockhampton.
- Central West, NSW – Charles Sturt University based in Bathurst.
- Northern, NSW – University of New England based in Armidale.

All the cities associated with these regions with the exception of Townsville are smaller than Cairns. The only regions in this group without a base university campus are as follows.

- Goulburn Valley, Vic, (pop'n 204,254).  
 The region is composed of a series of smaller regions with largest city, Shepparton, having a population of 46,776 (2004), ie about a third the size of Cairns. It has campuses of Latrobe and Melbourne universities.
- South East, NSW, (pop'n 209,270)  
 This is an agglomeration of smaller districts with no central city, and includes the coastal valleys along the lower south coast of New South Wales with no substantial core cities. The Southern Tablelands and Queanbeyan lie next to Canberra and the Snowy area orients to Canberra. Largest city in the area (apart from Queanbeyan which is effectively part of the Canberra urban area) is Goulburn (pop'n 21,000) with a CSU School of Policing Studies.

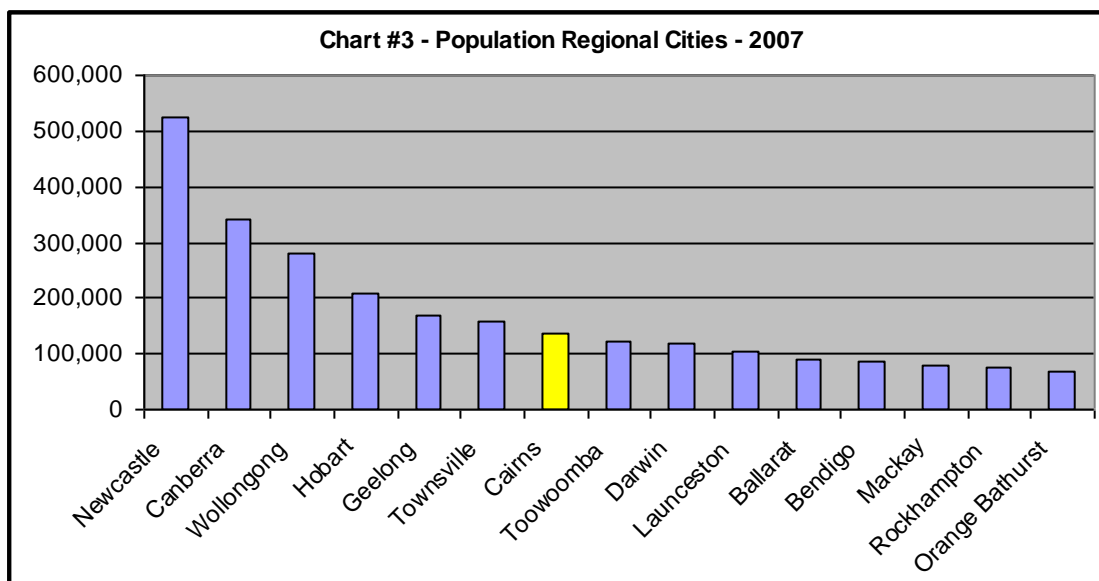
Of the remainder of the Statistical Divisions listed, Ballarat (pop'n 89,665) has a stand alone core campus and Launceston (pop'n 104,071) has both a campus of the University of Tasmania and the Australian Maritime College.

Looking at populations by size of cities, Cairns ranks as follows.

| <b>Table #2 – Regional City Populations 2007, &amp; University Locations</b> |                 |                |  |
|--|-----------------|----------------|--|
|  | <b>City</b>     | <b>Pop'n</b>   | <b>University Status</b>                           |
| 1  | Newcastle       | 523,623        | Base Campus  |
| 2  | Canberra        | 339,865        | 2 Base Campuses & Australian Defence Force Academy |
| 3  | Wollongong      | 280,159        | Base Campus  |
| 4  | Hobart          | 207,484        | Base Campus  |
| 5  | Geelong         | 169,544        | Base Campus  |
| 6  | Townsville      | 157,154        | Base Campus  |
| <b>7</b>   | <b>Cairns</b>   | <b>135,856</b> | <b>Campus</b>                                      |
| 8  | Toowoomba       | 123,406        | Base Campus  |
| 9  | Darwin          | 117,395        | Base Campus  |
| 10   | Launceston      | 104,071        | Campus & Australian Maritime College               |
| 11   | Ballarat        | 89,665         | Base Campus  |
| 12   | Bendigo         | 86,510         | Campus   |
| 13   | Mackay          | 79,172         | Campus   |
| 14   | Rockhampton     | 74,530         | Base Campus  |
| 15   | Orange Bathurst | 69,718         | Campus CSU   |

Source : Cummings Economics & ABS Population data.

Chart 3 illustrates.



The following table looks at populations of regions and cities in the north.

**Table #4 – Population Of Regions & Cities In North Australia, 2007**

| Statistical Division | Pop'n   | City        | Pop'n   | University Status |
|----------------------|---------|-------------|---------|-------------------|
| Far North            | 253,721 | Cairns      | 135,856 | Campus            |
| Northern             | 214,295 | Townsville  | 157,145 | Base Campus       |
| Northern Territory   | 214,975 | Darwin      | 117,395 | Base Campus       |
| Fitzroy              | 204,537 | Rockhampton | 74,530  | Base Campus       |
| Mackay               | 163,127 | Mackay      | 79,172  | Campus            |

Source : Cummings Economics & ABS Population data.

It should also be noted that the extent of areas serviced vary markedly, especially between the northern regions and those of southern Queensland, New South Wales, Victoria and Tasmania.

Charles Darwin University services the whole of the Northern Territory. Cairns services a region larger than the State of Victoria and as deep from north to south as the State of New South Wales.

The smallest of Queensland's northern regions, the Mackay region, has an area larger than the State of Tasmania.

**Table #5 – Some Relevant Regional Areas**

| Areas                                | Sq Km     |
|--------------------------------------|-----------|
| Northern Territory                   | 1,352,158 |
| Far North Q'ld Statistical Division  | 273,142   |
| Northern (Q'ld) Statistical Division | 80,059    |
| Mackay Statistical Division          | 90,340    |
| Victoria                             | 227,594   |
| Tasmania                             | 67,914    |

Source : Cummings Economics & ABS Population data.

Travel distances and services can also affect demand.

Generally, the northern cities are further away from metropolitan institutions than regional universities in southern Queensland and the southern States and further from each other (see table below).

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

|                 | To Nearest Metropolitan Centre |         | To Nearest Alternative Campus |         |
|-----------------|--------------------------------|---------|-------------------------------|---------|
| 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  |
| 10020Launceston | Melbourne                      | 450 km  | Hobart                        | 150 km  |
| Hobart          | Melbourne                      | 600 km  | Launceston                    | 150 km  |

\* Direct Distances.

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.

The following Census data tends to indicate the relatively low level of university development in the Cairns/Far North region.

**Table #7 – Comparative Regional Employment in ‘Higher Education’, ANZIC 4 Digit Code, 2006 Census**

| Stat Division        | Higher Education | Total Employment 15+ | Ratio Empl Higher Ed per '000 employed |
|----------------------|------------------|----------------------|--|
| Brisbane             | 10,885           | 862,354              | 12.6                                   |
| Gold Coast           | 1,655            | 222,892              | 7.4                                    |
| Sunshine Coast       | 635              | 119,627              | 5.3                                    |
| Darling Downs        | 1,252            | 96,764               | 12.9                                   |
| Wide Bay Burnett     | 167              | 95,280               | 1.8                                    |
| <b>Total SE Q'ld</b> | <b>14,594</b>    | <b>1,396,917</b>     | <b>10.44</b>                           |
| Fitzroy              | 1,158            | 87,625               | 13.2                                   |
| Mackay               | 115              | 72,763               | 1.5                                    |
| Northern             | 1,315            | 94,379               | 13.9                                   |
| Far North            | 385              | 107,470              | 3.6                                    |
| Northern Territory   | 395              | 87,178               | 4.5                                    |

Source : Cummings Economics from ABS Census data,2006.

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

#### 3.1 INTRODUCTION

Census 2006 data records population attending education establishments, including university, TAFE, secondary and primary 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 size of a region relevant to the demand for higher education.

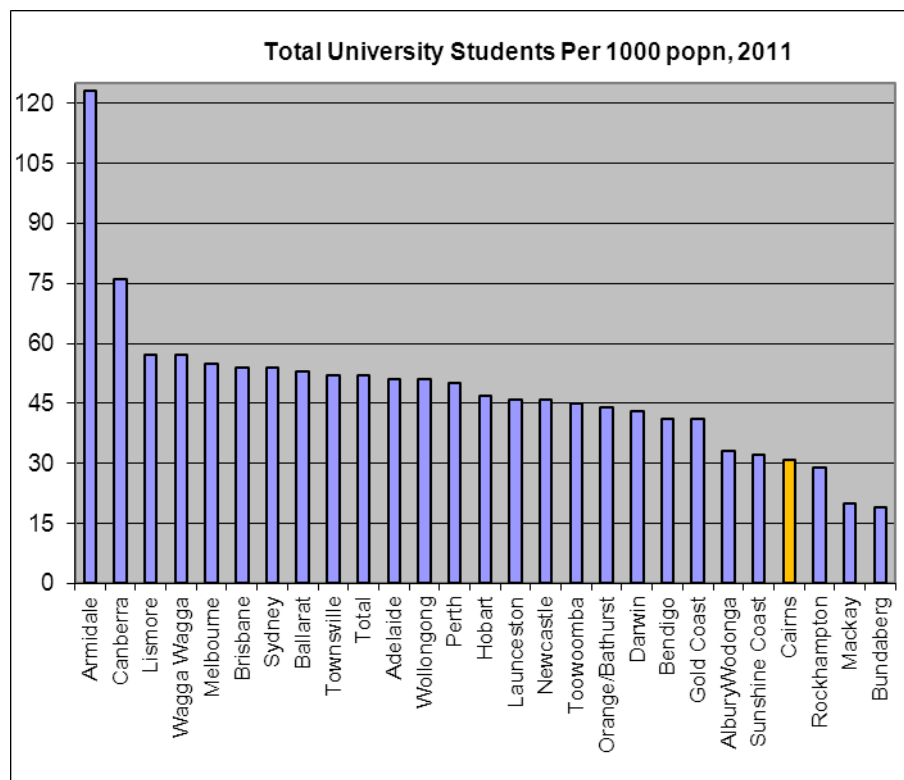
The following tables give ratios of university students in relevant cities compared with secondary school students and TAFE students, total census count of population by usual place of residence, and by whether the university students were full-time, part-time or total.

#### 3.2 COMPARISON OF UNIVERSITY STUDENTS WITH POPULATION

Tables #8, #9 and #10 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 #8 – Total University Students per 1,000 Population**

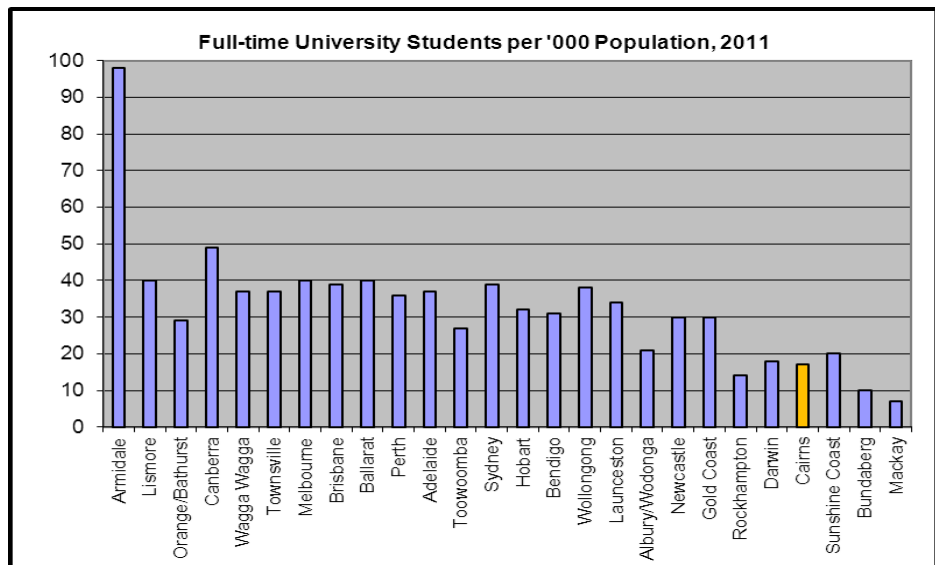
| Area            | Uni/Pop'n<br>Total/000 |
|-----------------|------------------------|
| Armidale        | 123                    |
| Canberra        | 76                     |
| Lismore         | 57                     |
| Wagga Wagga     | 57                     |
| Melbourne       | 55                     |
| 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 #9 – Full-Time University Students per 1,000 Population**

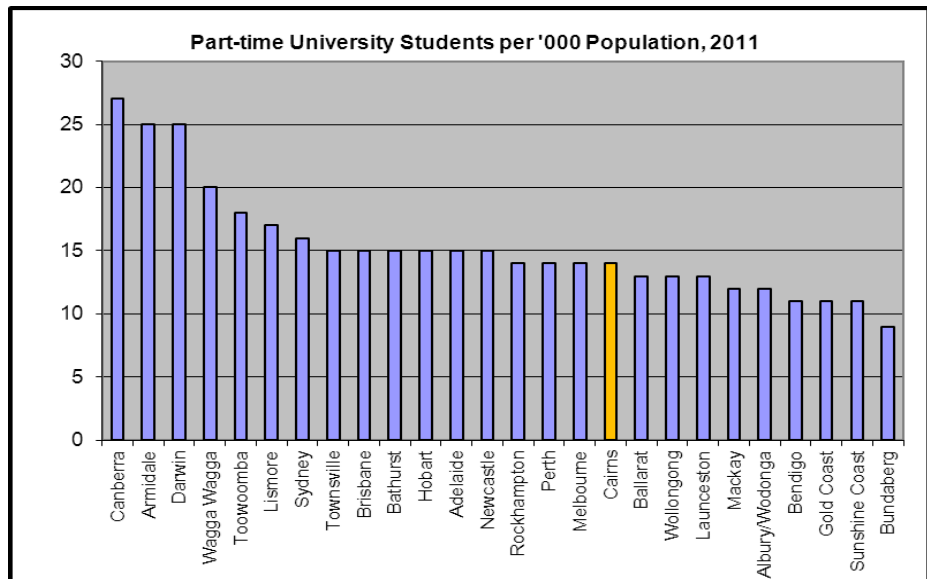
| Area            | Uni FT Total |
|-----------------|--------------|
| Armidale        | 98           |
| Lismore         | 40           |
| Orange/Bathurst | 29           |
| Canberra        | 49           |
| Wagga Wagga     | 37           |
| Townsville      | 37           |
| Melbourne       | 40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



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

**Table #10 – 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            |
| <b>Total</b>   | <b>15</b>    |



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

It can be seen from Table #8, that despite Cairns' relative 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 #9 and #10 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.

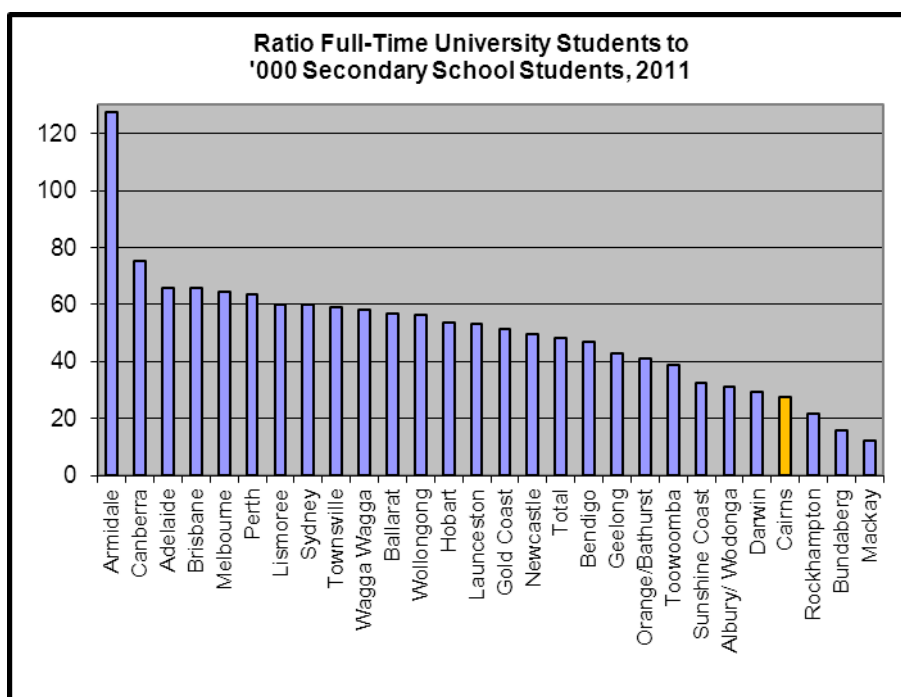
**University Students per 1,000 Population**

|                   | Cairns    | National Average |
|-------------------|-----------|------------------|
| Full-time.....    | 17        | 36               |
| Part-time.....    | 14        | 15               |
| <b>Total.....</b> | <b>31</b> | <b>52</b>        |

This low penetration of the full-time student market is confirmed by Table #11 showing ratio full-time students to secondary school students.

**Table #11 – Ratio Full-Time University Students to 1,000 Secondary School Students**

| Area            | Uni/<br>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 substantially rise in total student numbers from 31 per 1,000 to 52 per 1,000, a rise of 67%.



The following shows ratios for the cities around Cairns size range.

|                            | <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              |
| <b>cf Cairns</b>           | <b>3.1</b>   | <b>1.7</b>       | <b>1.4</b>       |

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%.

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

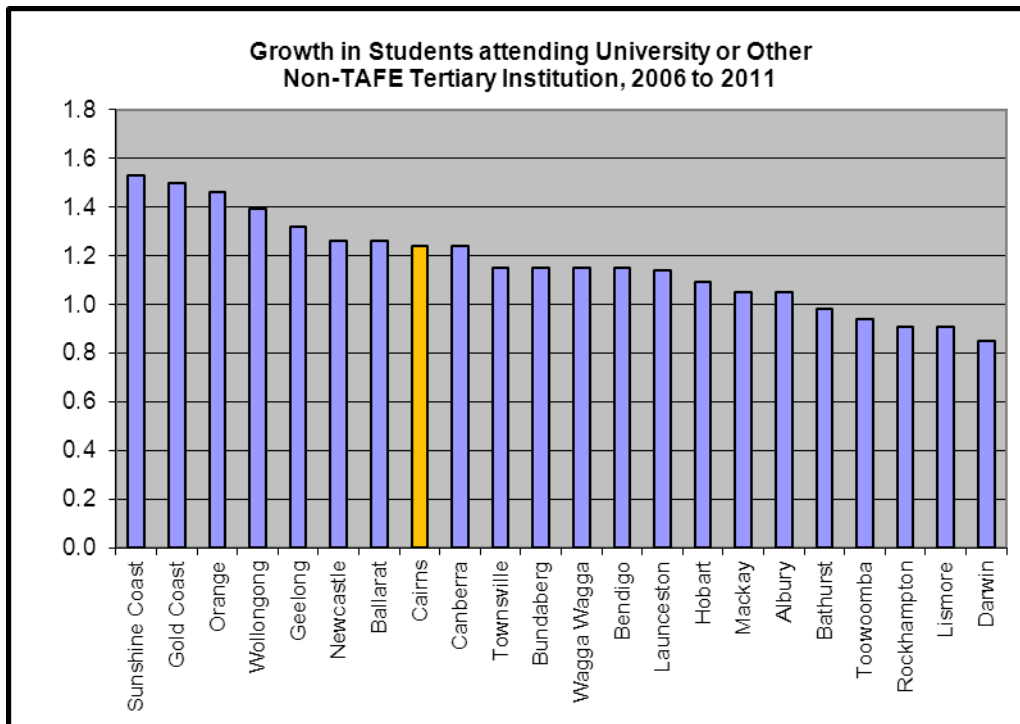
The following table analyses growth in student numbers by 2006 – 2011 according to census data.

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.

| <b>Table #12 – Growth in Students Attending University or Other Non TAFE Tertiary Institution, 2006 – 2011, Census &amp; Population</b> |                            |                 |               |                   |                  |               |                           |
|---|----------------------------|-----------------|---------------|-------------------|------------------|---------------|---------------------------|
| <b>Place of Enumeration</b>   |                            |                 |               |                   |                  |               |                           |
|   | <b>University students</b> |                 |               | <b>Population</b> |                  |               | <b>Diff Gwth % Points</b> |
|   | <b>2006 No.</b>            | <b>2011 No.</b> | <b>% Gwth</b> | <b>2006 No.</b>   | <b>2011 No.</b>  | <b>% Gwth</b> |                           |
| Darwin  | 3,860                      | 3,274           | <b>0.85</b>   | 75,545            | 80,484           | <b>1.07</b>   | <b>-0.22</b>              |
| Cairns  | 3,603                      | 4,474           | <b>1.24</b>   | 165,014           | 180,569          | <b>1.09</b>   | <b>0.15</b>               |
| Townsville  | 7,844                      | 9,058           | <b>1.15</b>   | 160,142           | 178,375          | <b>1.11</b>   | <b>0.04</b>               |
| Mackay  | 1,735                      | 1,821           | <b>1.05</b>   | 101,441           | 111,253          | <b>1.10</b>   | <b>-0.05</b>              |
| Rockhampton   | 3,026                      | 2,742           | <b>0.91</b>   | 103,136           | 110,582          | <b>1.07</b>   | <b>-0.17</b>              |
| Bundaberg   | 1,281                      | 1,476           | <b>1.15</b>   | 91,275            | 85,109           | <b>0.93</b>   | <b>0.22</b>               |
| Toowoomba   | 5,715                      | 5,393           | <b>0.94</b>   | 141,887           | 149,927          | <b>1.06</b>   | <b>-0.11</b>              |
| Sunshine Coast  | 6,071                      | 9,303           | <b>1.53</b>   | 293,905           | 319,094          | <b>1.09</b>   | <b>0.45</b>               |
| Gold Coast  | 14,224                     | 21,329          | <b>1.50</b>   | 469,736           | 520,686          | <b>1.11</b>   | <b>0.39</b>               |
| Newcastle   | 8,696                      | 10,969          | <b>1.26</b>   | 141,871           | 149,219          | <b>1.05</b>   | <b>0.21</b>               |
| Wollongong  | 8,489                      | 11,824          | <b>1.39</b>   | 183,632           | 192,048          | <b>1.05</b>   | <b>0.35</b>               |
| Lismore   | 2,375                      | 2,152           | <b>0.91</b>   | 42,613            | 42,907           | <b>1.01</b>   | <b>-0.10</b>              |
| Orange  | 787                        | 1,148           | <b>1.46</b>   | 34,968            | 38,571           | <b>1.10</b>   | <b>0.36</b>               |
| Bathurst  | 2,628                      | 2,571           | <b>0.98</b>   | 36,218            | 38,857           | <b>1.07</b>   | <b>-0.09</b>              |
| Wagga Wagga   | 3,197                      | 3,690           | <b>1.15</b>   | 57,601            | 60,216           | <b>1.05</b>   | <b>0.11</b>               |
| Albury  | 1,761                      | 1,845           | <b>1.05</b>   | 46,664            | 47,776           | <b>1.02</b>   | <b>0.02</b>               |
| Canberra  | 22,930                     | 28,326          | <b>1.24</b>   | 327,899           | 360,550          | <b>1.10</b>   | <b>0.14</b>               |
| Bendigo   | 3,491                      | 4,010           | <b>1.15</b>   | 92,147            | 99,388           | <b>1.08</b>   | <b>0.07</b>               |
| Ballarat  | 4,115                      | 5,183           | <b>1.26</b>   | 84,656            | 92,711           | <b>1.10</b>   | <b>0.16</b>               |
| Geelong   | 5,913                      | 7,822           | <b>1.32</b>   | 194,346           | 208,469          | <b>1.07</b>   | <b>0.25</b>               |
| Hobart  | 4,982                      | 5,432           | <b>1.09</b>   | 48,842            | 50,276           | <b>1.03</b>   | <b>0.06</b>               |
| Launceston  | 3,074                      | 3,500           | <b>1.14</b>   | 62,413            | 64,510           | <b>1.03</b>   | <b>0.10</b>               |
|   | <b>119,797</b>             | <b>147,342</b>  | <b>1.23</b>   | <b>2,955,951</b>  | <b>3,181,577</b> | <b>1.08</b>   | <b>0.15</b>               |

Source : Cummings Economics from ABS Census data, 2011.



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.

## 5. 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 and employment per 1,000 population.

| <b>Table #13 – Employment in Higher Education, 2011 Census, &amp; Ratio per 1,000 Population Usual Place of Residence</b> |                   |                                   |
|---|-------------------|-----------------------------------|
| <b>SUA</b>  | <b>Employment</b> | <b>Employment per 1,000 pop'n</b> |
| 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             | 3.1                               |
| 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                               |
| <b>Total</b>  | <b>123,194</b>    | <b>7.7</b>                        |

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

Note: Relatively low figures for Gold Coast/Tweed and Sunshine Coast reflect the relatively high population 65+.

## 6. STUDENT NUMBERS BY REGIONAL INSTITUTIONS – AUSTRALIAN GOVERNMENT DATA

### 6.1 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 |                |   |                                      |                       |                    |
|---|----------------|---|--------------------------------------|-----------------------|--------------------|
| Uni   | EFTSL          | Main Cities   | Pop'n City 2007                      | Pop'n Combined Cities | EFTSL's/'000 Pop'n |
| U of NE   | 9,829          | Tamworth<br>Armidale                                | 38,735<br>22,468                     | 61,203                | 160.6              |
| U of B  | 8,794          | Ballarat  | 91,801                               | 91,801                | 95.8               |
| CSU   | 21,340         | Orange Bathurst<br>Wagga<br>Albury/Wodonga<br>Dubbo | 70,947<br>52,042<br>82,083<br>33,997 | 239,069               | 89.3               |
| U of SQ   | 13,391         | Toowoomba<br>Hervey Bay                             | 105,984<br>48,680                    | 154,664               | 86.6               |
| SCU   | 9,587          | Tweed Heads<br>Lismore<br>Coffs Harbour             | 44,246<br>28,285<br>45,580           | 118,111               | 81.2               |
| U of TAS  | 18,412         | Hobart<br>Launceston                                | 200,944<br>82,220                    | 283,164               | 65.0               |
| JCU   | 14,238         | Cairns<br>Townsville                                | 133,911<br>162,292                   | 296,203               | 48.1               |
| CQU   | 12,228         | Rockhampton<br>Gladstone<br>Mackay<br>Bundaberg     | 73,681<br>41,966<br>77,293<br>67,341 | 260,281               | 47.0               |
| CDU   | 4,509          | Darwin  | 106,255                              | 106,255               | 42.4               |
| <b>Total</b>  | <b>112,328</b> |   |                                      | <b>1,610,751</b>      | <b>69.7</b>        |

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

James Cook Campuses were split in 2010 :-

|                   |               |             |
|-------------------|---------------|-------------|
| Cairns .....      | 2,474         | 18%         |
| Townsville .....  | 8,063         | 59%         |
| Other .....       | 3,186         | 23%         |
| <b>Total.....</b> | <b>13,723</b> | <b>100%</b> |

EFTSL to /000 Pop'n

|                  |      |
|------------------|------|
| Cairns .....     | 18.5 |
| Townsville ..... | 49.7 |

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

Townsville Campus is below average for this group. Cairns Campus at 18.5 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.

## 6.2 DOMESTIC STUDENTS

The following gives DEST 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.

| <b>Table #15 – Domestic Student (EFTSL's), Regional Universities</b> |                                  |                             |                                    |
|--|----------------------------------|-----------------------------|------------------------------------|
| <b>Institution</b>   | <b>Pop'n<br/>Combined Cities</b> | <b>Domestic<br/>EFTSL's</b> | <b>EFTSL's/<br/>Per '000 Pop'n</b> |
| U of NE  | 61,203                           | 8,954                       | <b>146.3</b>                       |
| CSU  | 239,069                          | 18,116                      | <b>75.8</b>                        |
| U of SQ  | 154,664                          | 9,984                       | <b>64.5</b>                        |
| SCU  | 118,111                          | 7,506                       | <b>63.4</b>                        |
| U of B   | 91,801                           | 4,697                       | <b>51.2</b>                        |
| U of TAS   | 283,164                          | 12,447                      | <b>44.0</b>                        |
| CDU  | 106,255                          | 4,020                       | <b>37.8</b>                        |
| JCU  | 296,203                          | 9,655                       | <b>32.6</b>                        |
| CQU  | 260,281                          | 6,883                       | <b>26.4</b>                        |
| <b>Total</b>   | <b>1,610,751</b>                 | <b>82,262</b>               | <b>51.1</b>                        |

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

JCU records lower figures along with Charles Darwin, University of Tasmania and CQU.

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

| <b>Table #16 – Domestic Student (EFTSL's), Cairns &amp; Townsville Campuses</b> |                       |  |  |
|---|-----------------------|--|--|
|   | <b>City<br/>Pop'n</b> | <b>JCU Campus<br/>Domestic EFTSL's</b> | <b>JCU Campus<br/>EFTSL/Per '000 Pop'n</b> |
| Townsville/Other  | 162,292               | 6,995                                  | 43.1                                       |
| Cairns  | 133,911               | 2,263                                  | 16.9                                       |

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 double the domestic student EFTSL's to bring them up to other equivalent regional university levels given the city's population size.

### 6.3 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. While the position for the Townsville Campus has moved up for commencing students, it remains low 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.

| <b>Table #17 – International Students, 2007</b> |                            |                              |   |
|---|----------------------------|------------------------------|---|
| <b>Institution</b>                              | <b>Combined City Pop'n</b> | <b>International EFTSL's</b> | <b>International EFTSL's Per '000 Pop'n</b> |
| 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   |
| <b>Total</b>                                    | <b>1,610,751</b>           | <b>28,064</b>                | <b>17.4</b>                                 |

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

Break up for JCU for 2010 is estimated at :-

|            |       |         |      |
|------------|-------|---------|------|
| Cairns     | 211   | 133,911 | 1.6  |
| Townsville | 2,263 | 162,292 | 13.9 |

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.

| <b>Table #18 – Ratio of International to Domestic EFTSL's</b> |                              |
|---|------------------------------|
| <b>Institution</b>  | <b>Ratio Int/Dom EFTSL's</b> |
| 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                         |
| <b>Total</b>  | <b>0.34</b>                  |

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

By comparison, Cairns Campus ratio is 0.15 and Townsville Campus is 0.09. Thus, not only is Cairns Campus low in domestic students, in ratio of international to domestic students, it is relatively low and has potential to expand about four-fold to bring it up to regional averages.

## 7. UNIVERSITY COMMENCING ENROLMENTS QUEENSLAND – QTAC DATA

### 7.1 ALL ENROLMENTS

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

| Institution                                 | Region of Permanent Residence |            |             |             |            |             |             |             |                | TOTAL        |
|---|-------------------------------|------------|-------------|-------------|------------|-------------|-------------|-------------|----------------|--------------|
|   | SW                            | NW/<br>CW  | FN          | NQ          | MAC        | FITZ        | DD          | WBB         | BRIS/<br>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<br>other                        |                               |            |             |             |            |             |             |             |                |              |
| <b>Total</b>                                | <b>91</b>                     | <b>125</b> | <b>1319</b> | <b>1569</b> | <b>693</b> | <b>1056</b> | <b>1295</b> | <b>1232</b> | <b>27179</b>   | <b>37369</b> |
| Est Attended<br>Uni in Own<br>Region        | na                            | na         | 600 *       | 1149        | na         | 632         | 566         | na          | 21792          |              |
| % of Total<br>from Region                   | na                            | na         | 47%         | 73%         | na         | 60%         | 44%         | na          | 80%            |              |
| Reg Pop'n,<br>2011                          | 26530                         | 47342      | 265945      | 225137      | 171297     | 217161      | 232745      | 279201      | 3008780        | 4474098      |
| Overall Enrolm't<br>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<br>Enrolment per<br>'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 748, some 600 were at Cairns and 148 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 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 and 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.



| <b>Table #20 – FNQ Enrolments – Where Enrolled. 2012</b> |                    |                    |
|--|--------------------|--------------------|
| <b>Institution</b>                                       | <b>No.</b>         | <b>%</b>           |
| Local JCU Cairns Campus                                  | 600 *              | 45%                |
| JCU Townsville Campus                                    | 171 *              | 13%                |
| Brisbane/Moreton Campuses <sup>(1)</sup>                 | <sup>(1)</sup> 355 | <sup>(1)</sup> 27% |
| Other Campuses <sup>(1)</sup>                            | <sup>(1)</sup> 193 | <sup>(1)</sup> 15% |
| <b>Total</b>   | <b>1319</b>        | <b>100%</b>        |

<sup>(1)</sup> 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.

| <b>Table #21 – NQ Enrolments – Where Enrolled, 2012</b> |                    |                    |
|---|--------------------|--------------------|
| <b>Institution</b>                                      | <b>No.</b>         | <b>%</b>           |
| Local JCU Townsville Campus                             | 1149               | 73%                |
| Brisbane/Moreton Campuses <sup>(1)</sup>                | <sup>(1)</sup> 153 | <sup>(1)</sup> 10% |
| Other Campuses <sup>(1)</sup>                           | <sup>(1)</sup> 267 | <sup>(1)</sup> 17% |
| <b>Total</b>  | <b>1569</b>        | <b>100%</b>        |

<sup>(1)</sup> 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.

| <b>Table #22 – Central Q'ld Region Enrolments – Where Enrolled, 2012</b> |                    |                    |
|--|--------------------|--------------------|
| <b>Institution</b>   | <b>No.</b>         | <b>%</b>           |
| Local CQU Campus   | 632                | 60%                |
| Brisbane/Moreton Campuses <sup>(1)</sup>                                 | <sup>(1)</sup> 275 | <sup>(1)</sup> 26% |
| Other Campuses <sup>(1)</sup>  | <sup>(1)</sup> 149 | <sup>(1)</sup> 14% |
| <b>Total</b>   | <b>1056</b>        | <b>100%</b>        |

<sup>(1)</sup> Note: TAFE and sundry campuses are included in 'other'.

Source : Cummings Economics from QTAC data.

Although CQU loses more than JCU Townsville to Brisbane/Moreton campuses, it attracts more from Brisbane (850) than JCU (147).

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