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1. Introduction

This report draws together a range of statistics to provide an overview of overseas migration in Queensland in recent years. The contents of the report will be used to inform the Queensland Government Population Projections Program and to provide a basis for relevant planning and policy development in Queensland. It updates the 2009 release *Overseas migration to Queensland* with currently available overseas migration data and includes some analysis of historical trends.

There are numerous datasets relating to overseas migration, and no single dataset captures the full breadth of the topic. The Net Overseas Migration Travellers' Characteristics Database (TCDB) is compiled by the Australian Bureau of Statistics (ABS) from information supplied by the Australian Government Department of Immigration and Citizenship (DIAC). The TCDB records the resident population impact of all types of overseas migration, measured as net overseas migration (NOM)¹. It provides a common point of reference on the interrelationships between the various overseas migration datasets.

Section 2 details current NOM arrival and departure data from the TCDB by financial year, visa type and age of overseas migrants. Section 3 describes recent outcomes from the permanent migration program (including the humanitarian program). Section 4 details temporary migration, with special focus on temporary entrants on Student visas and Business (Long Stay) (subclass 457) visas due to recent increases in arrivals in these classes. Section 5 provides the Australian Government forecasts for NOM in Australia, current at the time of publication.

¹ The acronym 'NOM' is also applied by the ABS as a label for data series that contribute to the calculation of NOM (for example, 'NOM arrivals' at Figure 2.2).

2. Net overseas migration

Key points

- Queensland's net overseas migration (NOM) increased rapidly after 2004-05 to an unprecedented peak of 59,370 in 2008-09, before declining to 31,270 in 2010-11.
- Queensland's share of national NOM peaked over the period 2006-07 to 2008-09.
- Since 2008-09, NOM arrivals have fallen, while NOM departures have continued to increase.
- Queensland's NOM exhibits a young age profile relative to the existing population.
- Temporary entrants have become increasingly predominant in Queensland's NOM.

The ABS uses TCDB data to estimate the changes in Australia's ERP attributable to NOM. The NOM estimates published by the ABS measure the difference between the number of arrivals to Australia who stay for 12 months or more and the number of departures from Australia who leave for 12 months or more.

This section presents NOM data based on the '12/16 rule'. By this rule, NOM includes movements of all people who have resided in Australia for 12 out of the 16 months prior to the reference period, whether they are temporary or permanent residents. Estimates of NOM based on the 12/16 rule are not comparable with those based on previous methods. For this reason, analysis in this section has been restricted to NOM data calculated under the 12/16 rule. Appendix 1 provides further details of the TCDB and the 12/16 rule.

2.1 Net overseas migration and population growth

Over the three-year period to 30 June 2009, Queensland's NOM increased from 46,260 to a record level of 59,370 (Table 2.1). The annual contribution of NOM to Queensland's population growth increased from 44.0 per cent to 51.1 per cent in this period. NOM was the largest contributor to Queensland population growth between 2006-07 and 2009-10, before being replaced by natural increase in 2010-11.

The preliminary NOM estimate for 2009-10 represented a significant annual decline to 36,410, with a further decline to 31,270 in 2010-11. The estimated contribution of NOM to Queensland's population growth fell to 41.8 per cent in 2010-11. This was less than the estimated contribution of natural increase (48.7 per cent).

Table 2.1 Components of population growth, Queensland

Period	Natural increase	Net	Net	Total	NOM
		interstate migration	overseas migration		proportion of growth
					%
					— number —
2006-07	31,770	27,040	46,260	105,070	44.0
2007-08	35,450	23,090	54,050	112,590	48.0
2008-09	38,440	18,390	59,370	116,200	51.1
2009-10 ^(a)	35,120	9,580	36,410	81,110	44.9
2010-11 ^(b)	36,430	7,150	31,270	74,850	41.8

(a) Estimates of NOM and proportion of population growth are preliminary.

(b) Estimates of all components of population growth are preliminary.

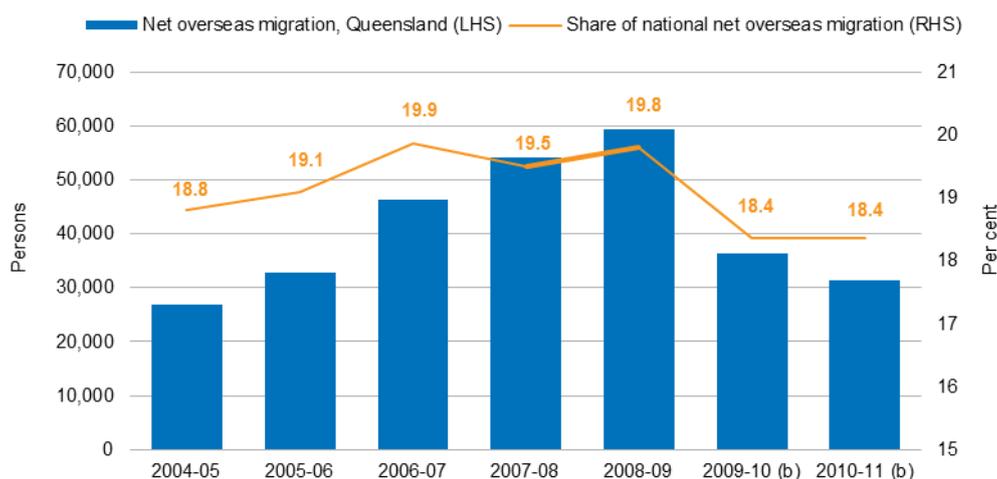
Note: Numbers are rounded to the nearest 10.

Source: ABS 3101.0, *Australian Demographic Statistics*, June 2011

2.1.1 Queensland's share of national net overseas migration

Over the seven-year period to 30 June 2011, changes in Queensland's NOM figure have been consistent with the national trend in NOM, which reached a peak of 299,860 in 2008-09 before declining to 170,280 in 2010-11. Queensland's share of Australia's total NOM has varied between 18.4 and 19.9 per cent since 2004-05 (Figure 2.1).

Preliminary estimates for the last two years indicate Queensland's share of national NOM has remained steady, accounting for an estimated 18.4 per cent in each year. This figure is less than the State's share of the national population (20.3 per cent at June 2011). New South Wales' share of Australia's NOM has also remained steady over the last two years. By comparison, Victoria's share has declined, and Western Australia has attracted an increasing proportion of the national total over this period².

Figure 2.1 Net overseas migration^(a), Queensland

(a) NOM estimates based on the 12/16 rule (see Appendix 1 for further information).

(b) Estimates are preliminary.

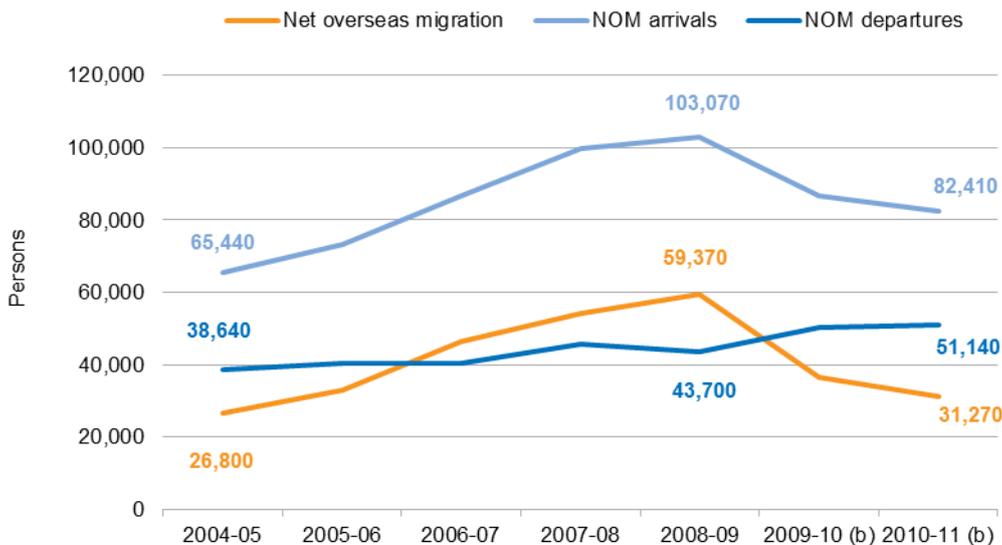
Source: ABS 3412.0, *Migration, Australia*, 2009-10, data cube: Net overseas migration, Arrivals and departures, State/territory, age and sex – Calendar and Financial years, 2004 to 2011

² ABS 3101.0, *Australian Demographic Statistics*, June 2011

2.2 Net overseas migration arrivals and departures

Queensland's strong growth in NOM during the five years to 30 June 2009 was due to an increase in NOM arrivals (from 65,440 to 103,070) (Figure 2.2). NOM departures remained largely unchanged during this period. The subsequent fall in the level of NOM (to 2010-11) is a result of a decrease in arrivals (from 103,070 to 82,410) and an increase in departures (from 43,700 to 51,140).

Figure 2.2 NOM arrivals, departures and net migration^(a), Queensland



(a) NOM estimates based on the 12/16 rule (see Appendix 1 for further information).

(b) Estimates are preliminary.

Note: numbers are rounded to the nearest 10.

Source: ABS 3412.0, *Migration, Australia*, 2009-10, data cube: Net overseas migration, Arrivals and departures, State/territory, age and sex – Calendar and Financial years, 2004 to 2011

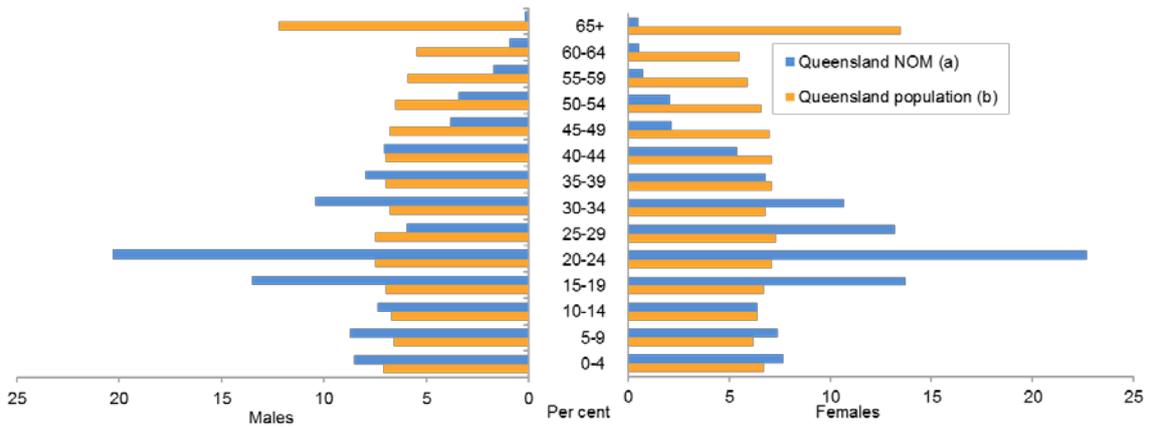
2.3 Net overseas migration by age and sex

Queensland's NOM includes a higher proportion of people in young working age groups and a lower proportion in older age groups, when compared with Queensland's total population (Figure 2.3). Persons aged between 15 and 34 years comprised 55.4 per cent of the net contribution to NOM in 2010-11 compared with 28.3 per cent of Queensland's population at 30 June 2011. Conversely, persons aged between 45 and 64 years comprised only 7.7 per cent of Queensland's NOM compared with 24.9 per cent of the total population. Persons aged 65 years and over comprised just 0.4 per cent of Queensland's NOM in 2010-11 and 12.9 per cent of the population.

The 15-34 year age group corresponds largely with students and young working adults, and represents an important component of Queensland's NOM. The level of NOM for persons aged 15-34 years peaked at 37,080 persons in 2008-09 after four years of sustained growth (Figure 2.4). Preliminary estimates for 2009-10 and 2010-11 show a decline in the level of NOM for this age group, consistent with the overall NOM trend (Figure 2.1). The share of Queensland's NOM attributed to this age group increased from 48.9 per cent to 63.0 per cent between 2004-05 and 2009-10, before declining to 55.4 per cent in 2010-11. Throughout the seven-year period to 30 June 2011, the

proportion of NOM in the 15-34 year age group has consistently exceeded that of the total population (which has remained steady at approximately 28 per cent)³.

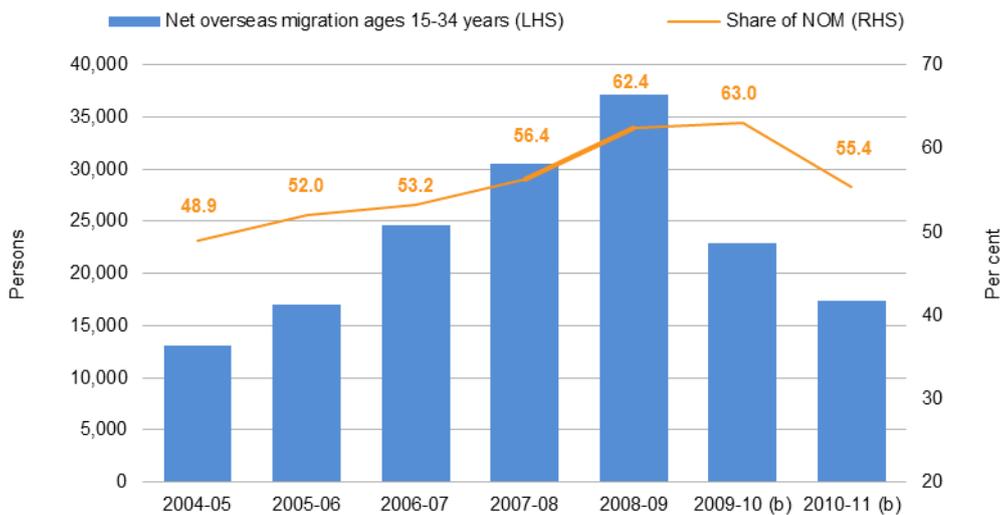
Figure 2.3 Queensland population at 30 June 2011 and Queensland net overseas migration, by five-year age group and sex, 2010-11



(a) NOM estimates for 2010-11 are preliminary.
 (b) Queensland's preliminary estimated resident population at 30 June 2011.
 Source: ABS 3101.0, *Australian Demographic Statistics*, September 2011; ABS 3412.0, *Migration, Australia*, 2009-10, data cube: Net overseas migration, Arrivals and departures, State/territory, age and sex – Calendar and Financial years, 2004 to 2011

The male and female shares of Queensland's NOM for persons of early working age were relatively equal over the period 2004-05 to 2008-09. These shares have diverged in the last two years, so that females of early working age now have a greater representation in the NOM estimates (54.0 per cent in 2009-10 and 56.5 per cent in 2010-11). By comparison, the male share of persons of older working age has grown notably, from 39.7 per cent in 2004-05 to 62.5 per cent in 2010-11.

Figure 2.4 Net overseas migration, persons aged 15-34 years^(a), Queensland



(a) NOM estimates based on the 12/16 rule (see Technical notes for further information).
 (b) Estimates are preliminary.
 Source: ABS 3412.0, *Migration, Australia*, 2009-10

³ ABS 3101.0, *Australian Demographic Statistics*, June 2011

2.4 Categories of net overseas migration

The ABS categorises NOM arrivals and departures⁴ into four major groupings:

- temporary visa holders
- permanent visa holders (migration and humanitarian programs)
- New Zealand citizens
- Australian citizens.

This section provides further details about NOM arrivals and departures by these categories and by visa groupings. Arrivals and departures of Australian and New Zealand citizens are also addressed in detail in this section. Further information about temporary and permanent visa holders (drawing on more comprehensive datasets) is provided in Sections 3 and 4.

A breakdown of the contribution of each of these categories and visa subclasses to Queensland's NOM in 2008-09 is shown in Table 2.2. Temporary visa holders represented 57.8 per cent of NOM, while New Zealand citizens and permanent visa holders accounted for 21.9 and 20.1 per cent of NOM respectively in 2008-09.

Table 2.2 Net overseas migration by major groupings and type of visa^(a), Queensland, 2008-09

Major groupings and type of visa	NOM arrival number	%	NOM departure number	%	NOM number	%
Permanent visas	12,830	12.4	860	2.0	11,960	20.1
Family	4,580	4.4	300	0.7	4,290	7.2
Skill	7,090	6.9	560	1.3	6,530	11.0
Special eligibility and humanitarian	1,160	1.1	10	0.0	1,150	1.9
Temporary visas	50,500	49.0	16,160	37.0	34,340	57.8
Vocational education and training sector	7,760	7.5	750	1.7	7,010	11.8
Higher education sector	10,930	10.6	3,260	7.5	7,670	12.9
Student other	5,190	5.0	1,560	3.6	3,630	6.1
Business (Long Stay)	9,530	9.2	2,030	4.6	7,500	12.6
Visitor ^(b)	7,690	7.5	3,290	7.5	4,400	7.4
Working Holiday	8,390	8.1	3,100	7.1	5,290	8.9
Other temporary visas	1,010	1.0	2,160	4.9	-1,150	-1.9
New Zealand citizen	19,440	18.9	6,430	14.7	13,010	21.9
Australian citizen	16,080	15.6	15,840	36.2	230	0.4
Total^(c)	103,070	100.0	43,700	100.0	59,370	100.0

(a) Estimates in this table are based on visa type at the time of travellers' movement.

(b) Visitor visas include tourists, business visitors, medical treatment and other.

(c) Includes residents returning (i.e. non-Australian citizens who are permanent residents), onshore visas and visa unknown.

Note: Numbers are rounded to the nearest 10.

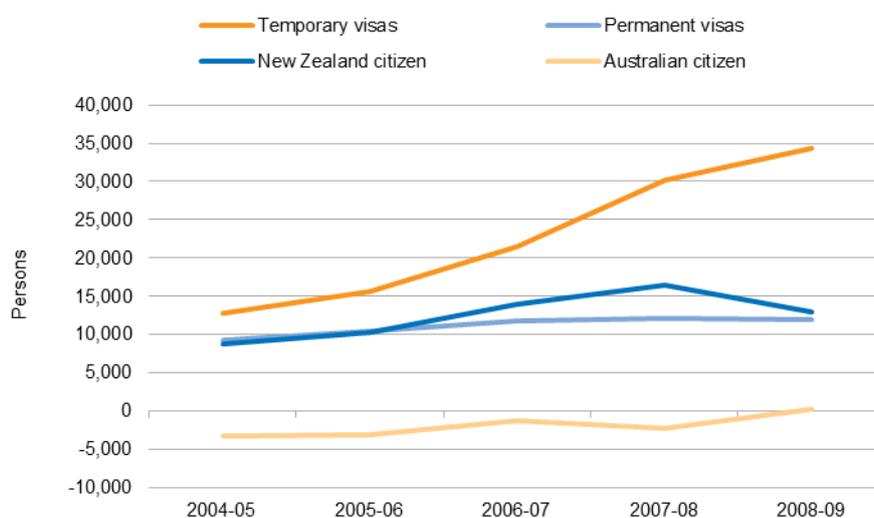
Source: ABS, unpublished data

⁴ That is, those who satisfy the 12/16 rule and thus contribute to the calculation of NOM.

The relative impacts of the four major category groupings on Queensland's NOM are shown in Figure 2.5. The annual contribution of temporary visa holders to NOM has increased substantially, from 12,750 in 2004-05 (47.6 per cent of NOM) to 34,340 in 2008-09 (57.8 per cent of NOM). Temporary entrants are discussed in more detail at Section 4.

Annual levels of NOM in other groupings were relatively stable over time by comparison. The number of NOM permanent visa holders increased moderately from 9,340 in 2004-05 to 11,960 persons in 2008-09, in line with Australian Government planning levels.

Figure 2.5 Net overseas migration by major grouping^(a), Queensland



(a) Excludes onshore and other visa types. Estimates in this graph are based on visa type at the time of travellers' movement.

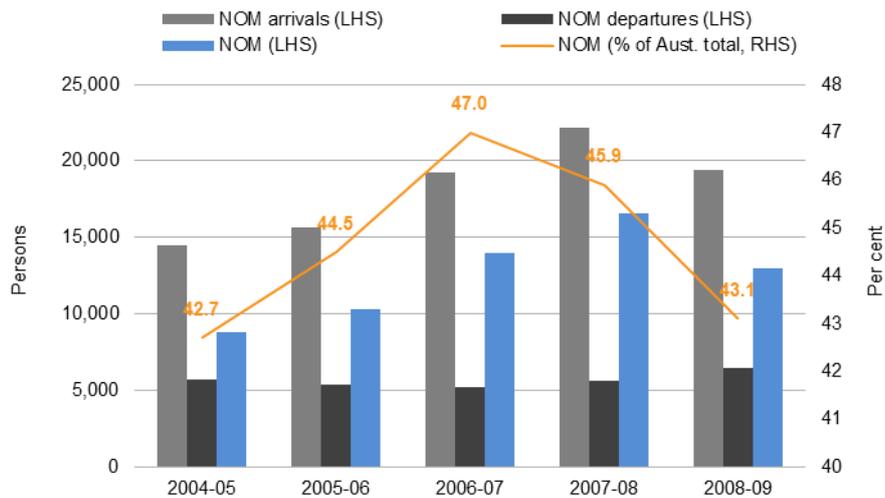
Source: ABS, unpublished data

2.4.1 New Zealand citizens

New Zealand citizen NOM arrivals to Queensland increased from 14,520 persons in 2004-05 to 19,440 persons in 2008-09, with a peak of 22,200 persons in 2007-08 (Figure 2.6). During this time, New Zealand citizen NOM departures remained comparatively stable, with a slight increase from 5,720 persons in 2004-05 to 6,430 persons in 2008-09. This increased the number of New Zealand citizens contributing to Queensland's NOM from 8,810 to 13,010 persons annually over this period.

Queensland's share of the national total of New Zealand citizen NOM in 2008-09 was similar to that recorded in 2004-05 (43.1 and 42.7 per cent respectively) after peaking at 47.0 per cent in 2006-07.

Figure 2.6 NOM arrivals, departures and net, New Zealand citizens, Queensland

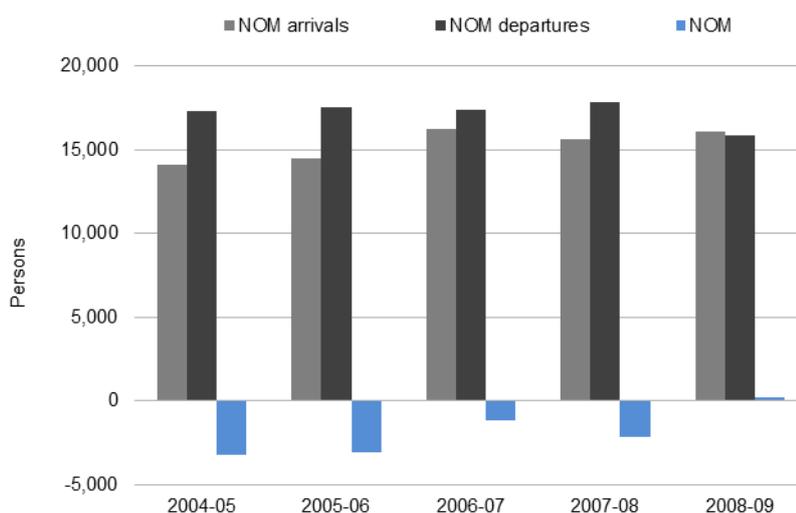


Source: ABS, unpublished data

2.4.2 Australian citizens

Australian citizens make a net detraction from NOM figures in most years as more Australians typically depart from Queensland for overseas each year than return. Between 2004-05 and 2008-09, Australian citizen NOM arrivals increased from 14,070 to 16,080 persons (Figure 2.7). The number of Australian citizens departing (for 12 out of 16 months) remained relatively stable between 17,000 and 18,000 persons per annum over the four years to 2007-08, before declining to 15,840 persons in 2008-09. The resulting net contribution to NOM in 2008-09 was 230 persons.

Figure 2.7 NOM arrivals, departures and net, Australian citizens, Queensland



Source: ABS, unpublished data

3. Permanent visa holders

Key points

- There were 11,100 permanent settler arrivals to Queensland under the migration program in 2010-11.
- Annual permanent migration arrivals to Queensland have declined since the 2008-09 peak in line with total net overseas migration.
- Queensland's annual humanitarian program migration intake has increased steadily since 2007-08 despite a national decline since 2008-09.

Together, the migration and humanitarian programs represent the part of Australia's overseas migration that is directed by policy (via Australian Government annual quotas or planning levels). Although it is the most stable component of Australia's total overseas immigration, the migration program's contribution to national NOM has declined relative to other components in recent years (Figure 2.5). Detailed data on the migration and humanitarian programs are maintained by DIAC (see Appendix 1 for further information about the permanent migration and humanitarian programs).

Section 3.1 describes settler arrivals (distinct from visas granted) under the migration program to Queensland from 2006-07 to 2010-11. Equivalent data for the humanitarian program are reported in Section 3.2. Settlers arriving in Australia under the migration and humanitarian programs have permission to remain permanently, and as such all (with some technical exceptions) are counted towards NOM.

3.1 Arrivals under the migration program

In the year to 30 June 2011, there were 11,090 permanent arrivals to Queensland⁵ under the migration program (Table 3.1), a decline from the record level in 2008-09 (16,610). As a result, Queensland's share of the national total has fallen from 14.9 per cent to 13.5 per cent over this period.

In 2010-11, skilled migration accounted for approximately half of Queensland's migration program intake (5,700 people or 51.4 per cent of the State total). This proportion declined from a peak of 66.6 per cent in 2007-08. The contribution of family migration increased from 35.8 per cent to 48.4 per cent over the same period. The relative contributions of eligibility categories were similar to Australia's migration program intakes in the five years to 30 June 2011.

⁵ According to settlers' intended state of residence.

Table 3.1 Migration program settler arrivals, Queensland^(a) and Australia

	2006-07	2007-08	2008-09	2009-10	2010-11
— persons —					
Queensland	13,890	15,210	16,610	13,760	11,090
Family	4,970	5,050	5,790	5,780	5,360
Skill	8,900	10,130	10,810	7,960	5,700
Special Eligibility	20	30	10	20	30
Australia	98,000	103,940	111,740	104,790	81,910
Family	37,140	38,400	42,160	43,000	41,080
Skill	60,760	65,400	69,460	61,630	40,550
Special Eligibility	110	130	120	170	280
— % of Australian total —					
Queensland	14.2	14.6	14.9	13.1	13.5
Family	13.4	13.2	13.7	13.4	13.1
Skill	14.6	15.5	15.6	12.9	14.1
Special Eligibility	17.4	21.4	8.1	11.8	8.9

(a) Based on intended state of residence at time of arrival in Australia.

Note: Numbers are rounded to the nearest 10.

Source: DIAC, *Settler Arrivals 2010-2011*

3.2 Arrivals under the humanitarian program

Australia's humanitarian migration quota is set annually by the Australian Government and is subject to changes in Australian Government policy. Since 2006-07, Australia's annual humanitarian intake has remained between 9,130 and 12,250 (Table 3.2). Queensland's share of this total has fluctuated between 10.0 and 14.8 per cent during this period.

In 2010-11, Queensland received 1,350 settlers under the humanitarian program after a steady increase since 2007-08 (and despite a fall in the national figure from 2008-09). Queensland's humanitarian intake is likely to increase slightly from 2011-12 as the national quota has been increased by approximately 1,000⁶ people (see Section 5 for further details on the outlook for overseas migration).

Table 3.2 Humanitarian program settler arrivals, Queensland^(a) and Australia

	2006-07	2007-08	2008-09	2009-10	2010-11
— persons —					
Queensland	1,400	980	1,160	1,280	1,350
Australia	12,250	9,510	11,650	9,860	9,130
— % of Australian total —					
Queensland	11.4	10.3	10.0	13.0	14.8

(a) Based on intended state of residence at time of arrival in Australia.

Note: Numbers are rounded to the nearest 10.

Source: DIAC, *Settler Arrivals 2010-2011*

⁶ DIAC, *Refugee and Humanitarian Issues - Australia's Response*, June 2011

4. Temporary visa holders

Key points

- Students accounted for one-third of the total number of temporary entrants present in Queensland at 30 June 2011.
- The number of temporary entrants present in Queensland at 30 June has increased rapidly since 2002. The largest increase was in the student category, while the highest rate of growth was in the Business (Long Stay) category.
- The higher education sector accounted for the largest proportion of overseas student visa grants in 2011, and the vocation and education training sector showed the fastest growth since 2002.
- The top three occupations for Business (Long Stay) visa grants in 2010-11 were resident medical officer, general medical practitioner and civil engineer.

Section 4 provides a closer examination of recent trends in temporary entrants in Queensland (that is, those arriving on temporary visa types), using DIAC and Australian Government Department of Employment, Education and Workplace Relations (DEEWR) datasets. These datasets include both those temporary entrants who were counted towards NOM (as they satisfied the 12/16 rule) and those who were not. As such the data in this section are distinct from the TCDB data introduced in Section 2. Further information is available on these datasets in the technical notes.

Section 4.1 presents data on temporary visa holders in Queensland at 30 June 2011. These data are recorded by DIAC as end-of-quarter stock (the number of temporary entrants present in Queensland at the end of the quarter). Annual data on student enrolments (by calendar year) and Business (Long Stay) visa grants (by financial year) are examined in more detail in Sections 4.2 and 4.3 respectively, due to their substantial recent influence on NOM.

4.1 Temporary entrant stock by visa type

There were 908,050 temporary entrants in Australia at 30 June 2011 (Table 4.1). Of these, 16.0 per cent or 145,160 people nominated Queensland as their intended primary place of residence.

At the end of June 2011, the visa group accounting for the largest percentage of total stock in Queensland was Temporary Resident (34.9 per cent or 50,690 people), followed by Student (33.8 per cent or 49,110 people) and Visitor (20.5 per cent or 29,830 people). The Temporary Resident category was mainly composed of those holding Working Holiday Maker and Business (Long Stay) visas.

The Temporary Resident, Student and Visitor categories all recorded declines in stock between June 2010 and June 2011. Of these three categories, the largest decline in stock was in the Student category, down from 55,530 at June 2010 to 49,110 at June 2011. The Bridging Visa category increased by 58.9 per cent over the same period.

Table 4.1 Stock of temporary entrants^(a), Queensland^(b) and Australia, 30 June 2011

Temporary entrant category	Queensland		Australia	
	number	%	number	%
Temporary Resident	<i>50,690</i>	<i>34.9</i>	<i>286,720</i>	<i>31.6</i>
Business (Long Stay)	22,000	15.2	131,340	14.5
Working Holiday Maker	22,280	15.3	107,980	11.9
Work and Holiday	640	0.4	4,010	0.4
Other Temporary Resident	5,770	4.0	43,400	4.8
Student^(c)	49,110	33.8	334,640	36.9
Visitor	29,830	20.5	166,750	18.4
eVisitor	2,870	2.0	14,110	1.6
Sponsored family	350	0.2	3,250	0.4
Other Tourist	24,460	16.9	134,390	14.8
Business Visitor	2,050	1.4	14,250	1.6
Other Visitor	110	0.1	760	0.1
Bridging Visa	14,090	9.7	112,380	12.4
Transit Visa	20	0.0	220	0.0
Total^(d)	145,160	100.0	908,050	100.0

(a) Notes on temporary entrant stock data:

- these data exclude all Provisional and selected other (e.g. Humanitarian) visa subclasses
- revised data are based on latest visa in effect and may not be consistent with data based on latest visa granted
- unlawful stay cases excluded.

(b) State of intended residence.

(c) Student includes Student Guardian.

(d) Includes other temporary entrants.

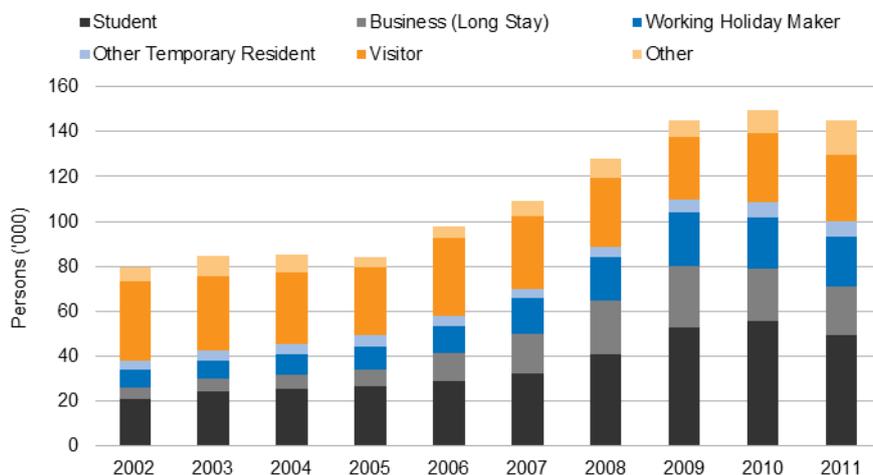
Note: Numbers are rounded to the nearest 10. Table components may not sum consistently to totals due to rounding.

Source: DIAC, unpublished data

4.1.1 Time series trends in temporary entrant stock

Figure 4.1 presents Queensland's temporary entrant stock by selected major and minor visa grouping for the 10 years to 30 June 2011. The total number of temporary entrants living in Queensland grew by an average annual rate of 6.9 per cent between June 2002 and June 2011, with increases in all years other than 2005 and 2011.

At 30 June 2002, visitors represented the largest proportion of temporary entrant stock in Queensland. Between 2002 and 2011, the stock of visitors fell by 16.4 per cent to 29,830 persons. Over the same period, the stock of students more than doubled to 49,110 persons. Students accounted for the largest share of Queensland's total stock of temporary entrants in 2011 (33.8 per cent). There were also substantial increases in the stock of Business (Long Stay) visa holders (from 5,400 to 22,000 persons) and Working Holiday Makers (from 7,740 to 22,280) over the period 2002 to 2011.

Figure 4.1 Stock of temporary entrants, Queensland, 30 June

Source: DIAC, unpublished data

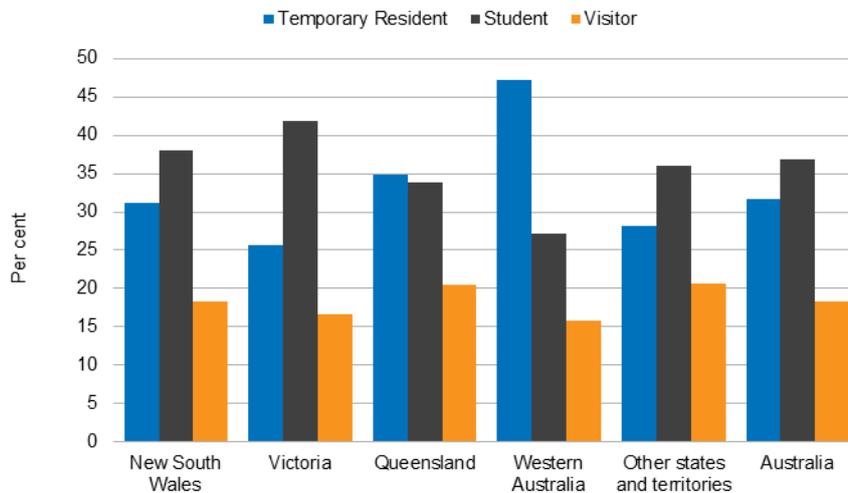
4.1.2 State comparisons

At 30 June 2011, four Australian states had temporary entrant stocks of over 50,000 persons (New South Wales, Queensland, Victoria and Western Australia). Both Victoria and Western Australia recorded increases from 30 June 2010 to 2011, while the stock of temporary entrants in New South Wales and Queensland declined⁷.

There were notable differences in the proportions of temporary entrant stock by visa major groups between these states (Figure 4.2). Victoria had the highest proportion of temporary entrants on Student visas (41.8 per cent), followed by New South Wales (38.0 per cent) and Queensland (33.8 per cent) at 30 June 2011. Western Australia had the highest proportion (47.2 per cent) of temporary residents (predominantly Business (Long Stay) and Working Holiday Maker visa holders), followed by Queensland (34.9 per cent).

⁷ DIAC, unpublished data

Figure 4.2 Stock of temporary entrants by selected visa group^(a), 30 June 2011



(a) Excludes Bridging visa, Transit visa and Other Temporary Entrant.
Source: DIAC, unpublished data

4.2 Overseas students

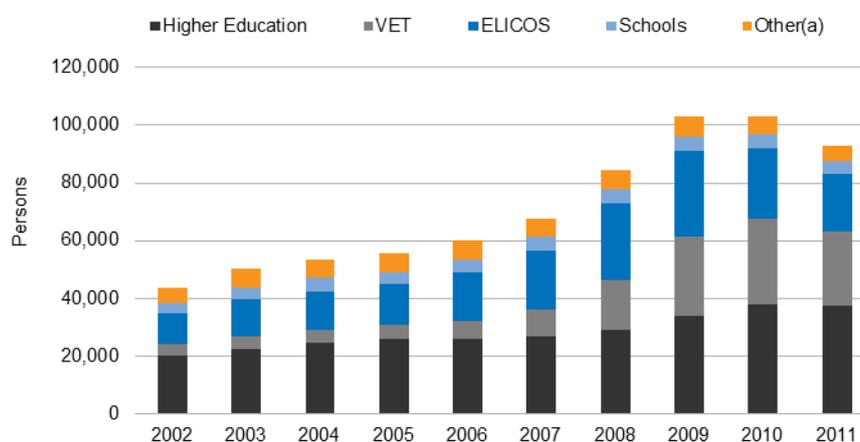
4.2.1 Overseas student enrolments by sector

This section draws on a comprehensive database on overseas student enrolments in Australia maintained by Australian Education International (AEI), within DEEWR.

Queensland's overseas student enrolments by sector for the 10 calendar years to 2011 are shown in Figure 4.3. Queensland received 92,960 overseas student enrolments in 2011. This level represents a decline of 10,320 enrolments since 2010. Annual overseas student enrolments in Queensland rose quickly after 2006, increasing by 70.8 per cent (42,640 enrolments) over the next three years to 2009.

In 2011, the higher education sector (university or equivalent) attracted the largest proportion (40.3 per cent) of Queensland's overseas student enrolments. Vocational education and training (VET, which includes TAFE and other similar institutions) and English Language Intensive Courses for Overseas Students (ELICOS) attracted the majority of the remainder.

The largest increases in overseas student numbers since 2006 have been in VET courses. Overseas VET enrolments increased by 19,410 or over 300 per cent over the five years to 2011, and represented 59.3 per cent of the total increase of overseas enrolments in that period. This sector also recorded the largest annual decline to 2011 as various trade-based qualifications were eliminated from the Australian Government skilled migration program assessment criteria.

Figure 4.3 International student enrolments by sector, year to 31 December

(a) Non-Award Courses, Enabling Courses.

Source: AEI, 2011, www.aei.gov.au, accessed 10/03/2012

While Queensland's share of Australia's annual overseas student enrolments is below the population share, enrolment levels have closely followed national increases since 2006⁸ as education has increased in significance as an export market. The current downturn is associated with reduced international demand for education services and recent changes to visa regulations which have reduced overseas students' access to permanent resident visa conversions.

4.2.2 Overseas student enrolments by country of origin

The top 10 source nationalities of overseas students in Queensland in 2010 and 2011 are listed in Table 4.2. In Queensland, over 50 per cent of all international enrolments in 2011 were sourced from five nationalities: China (22.1 per cent of the total), India (14.2 per cent), South Korea (7.1 per cent), Brazil (4.9 per cent) and Japan (3.7 per cent). China and South Korea have remained in the top three source nationalities by annual enrolments since 2005.

Of the top 10 source countries for overseas student enrolments in Queensland in 2011, all but Saudi Arabia recorded a fall from the previous year. This reflected the fall in total overseas student enrolments in Queensland. The largest falls were in students from India and South Korea, while the fall in enrolments of Chinese students was modest by comparison.

⁸ AEI, 2011, www.aei.gov.au, accessed 10/03/2012

Table 4.2 Overseas student enrolments, Queensland, year to 31 December

Nationality	Enrolments		Change, 2010 to 2011		% total OS enrolments, 2011
	2010	2011	Persons	%	
China	20,950	20,510	-440	-2.1	22.1
India	17,970	13,200	-4,760	-26.5	14.2
Korea, Republic of (South)	7,780	6,620	-1,160	-14.9	7.1
Brazil	4,960	4,550	-410	-8.3	4.9
Japan	3,550	3,420	-140	-3.9	3.7
Taiwan	3,780	3,320	-450	-12.0	3.6
Saudi Arabia	3,220	3,250	30	1.0	3.5
United States of America	3,040	3,020	-30	-0.9	3.2
Colombia	3,170	2,680	-490	-15.3	2.9
Malaysia	2,670	2,630	-40	-1.3	2.8
Total (all nationalities)	103,280	92,960	-10,320	-10.0	100.0

Note: Numbers are rounded to the nearest 10.

Source: AEI, 2011, www.aei.gov.au, accessed 10/03/2012

4.2.3 Student visa conversions to permanent visa types

DIAC publishes limited information about conversions of temporary visas to other visa types by financial year. In Australia in 2010-11, 18,800 overseas students converted from overseas student visas to permanent visas⁹. This was 7,570 more than in the previous year. The most common permanent visa option for former students in 2010-11 was the Skilled – Independent visa (8,510 visas granted), followed by the Partner visa (5,180 visas granted) and the Skilled Sponsored visa (4,140 visas granted).

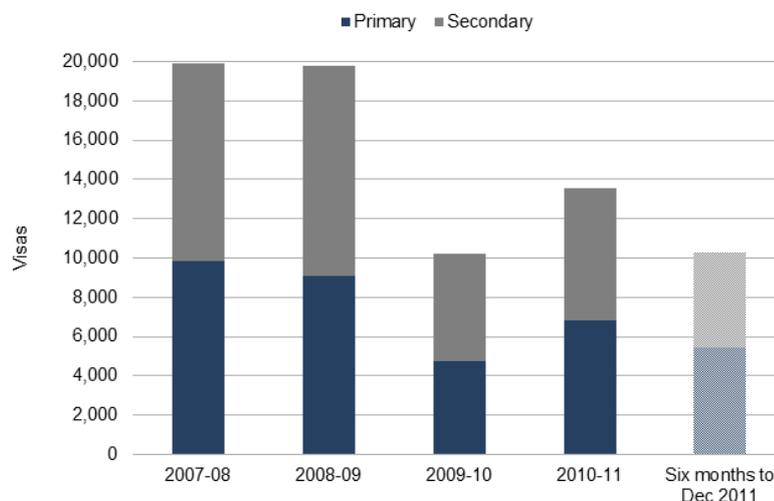
4.3 Business (Long Stay) (subclass 457 visas)

Business (Long Stay) visas are predominant in Australian NOM and ERP figures due to strong domestic demand for labour. This section draws on data maintained by DIAC to demonstrate trends in Business (Long Stay) visa grants.

Annual grants of Business (Long Stay) visas in Queensland fell substantially between 2007-08 and 2009-10 before increasing in 2010-11 (Figure 4.4). The 13,550 primary and secondary visas granted in 2010-11, and the further 10,290 visas granted in the six months to 31 December 2011, indicate a recovery from the low of 10,200 visas granted in 2009-10. Annual grants remain well below the peak of 19,930 visas granted in 2007-08.

Since 2007-08, there have been approximately equal proportions of Business (Long Stay) visas granted to primary and secondary applicants (secondary applicants are the accompanying dependants of primary applicants).

⁹ DIAC, *Student visa program quarterly report*, 30 June 2011

Figure 4.4 Business (Long Stay) primary and secondary^(a) visa grants

(a) Secondary applicants are the accompanying dependants of primary applicants.

Source: DIAC, *Subclass 457 State/Territory summary report, 2007-08 to 2011-12 to 31 December 2011*

4.3.1 Business (Long Stay) visa sponsor industries

In 2010-11, the top three sponsor industries for positions located in Queensland were healthcare and social assistance (17.6 per cent of total primary visas granted), construction (17.5 per cent) and mining (14.1 per cent) (Table 4.3). In the six months to December 2011, these three categories remained the most common, with construction increasing its share to 18.6 per cent and mining increasing its share to 15.7 per cent of the total¹⁰.

A broad range of occupations were included among Business (Long Stay) visa holders. The top three occupations were resident medical officer (260), general medical practitioner (240) and civil engineer (210).

¹⁰ DIAC, *Subclass 457 State/Territory summary report, 2010-11 to 30 June 2011*; DIAC, *Subclass 457 State/Territory summary report, 2011-12 to 31 December 2011*

Table 4.3 Primary Business (Long Stay) visa applications granted, Queensland

Sponsor industry	2009-10		2010-11	
	number	% of total	number	% of total
Health Care and Social Assistance	1,100	23.3	1,200	17.6
Construction	650	13.7	1,200	17.5
Mining	510	10.8	970	14.1
Education and Training	430	9.1	540	7.9
Other Services	240	5.1	530	7.8
Professional, Scientific and Technical	130	2.7	370	5.4
Manufacturing	350	7.4	340	5.0
Accommodation and Food Services	180	3.8	250	3.7
Information, Media and Telecommunications	160	3.4	250	3.7
Rental, Hiring and Real Estate Services	150	3.2	230	3.3
Agriculture, Forestry and Fishing	150	3.2	180	2.6
Financial and Insurance Services	150	3.2	150	2.2
Retail Trade	140	3.0	150	2.2
Electricity, Gas, Water and Waste Services	80	1.7	120	1.7
Transport, Postal and Warehousing	60	1.3	100	1.4
Total	4,730	100.0	6,840	100.0

Note: Source data are rounded to the nearest 10.

Source: DIAC, *Subclass 457 State/Territory summary report, 2010-11 to 30 June 2011*

4.3.2 Business (Long Stay) visa countries of citizenship

Table 4.4 shows Queensland Business (Long Stay) visa grants by country of citizenship and nominated position location for the year to 30 June 2011. More than one-third of Business (Long Stay) visa holders in Queensland were citizens of North-West Europe (4,870 visas or 35.9 per cent of all visas granted), followed by the Americas (2,410 visas or 17.8 per cent), South-East Asia (1,780 visas or 13.1 per cent) and Southern and Central Asia (1,780 visas or 13.1 per cent).

In 2010-11, the majority (66.0 per cent or 8,940 visas) of people granted Business (Long Stay) visas in Queensland (both primary and secondary applicants) nominated their position location as Brisbane Statistical Division (SD). The coastal SDs of Gold Coast, Fitzroy, Mackay and Northern were the nominated locations for a further 20.8 per cent of persons granted Business (Long Stay) visas.

Table 4.4 Business (Long Stay) visas granted^(a) by location and citizenship, Queensland, 2010-11

Nominated Position Location (Statistical Division)	Citizenship Country (SACC Major Region) ^(b)						Total^(c)
	Americas	North- East Asia	North- West Europe	South- East Asia	Southern and Central Asia	Sub- Saharan Africa	
Brisbane	1,620	630	3,520	920	1,180	560	8,940
Gold Coast	110	110	350	80	120	60	920
Sunshine Coast	30	10	110	20	40	20	240
West Moreton	20	20	10	110	10	< 5	190
Wide Bay-Burnett	30	< 5	100	40	80	50	320
Darling Downs	70	20	70	80	30	30	320
South West	40	< 5	10	40	< 5	10	110
Fitzroy	220	20	140	110	100	70	690
Central West	0	0	10	10	0	0	10
Mackay	130	20	210	140	50	90	650
Northern	80	30	160	100	80	60	560
Far North	30	10	140	70	70	40	380
North West	30	< 5	40	60	10	50	220
Not specified	10	10	< 5	0	< 5	< 5	20
Total	2,410	890	4,870	1,780	1,780	1,030	13,550

(a) Includes primary and secondary applicants. Figures are rounded to the nearest 10 and components may not sum to totals.

(b) ABS, Standard Australian Classification of Countries (SACC).

(c) Includes 'Other category' which consists of SACC Major Regions of North Africa and the Middle East, Oceania and Antarctica, Southern and Eastern Europe, and not specified.

Note: Source data are rounded to the nearest 10.

Source: DIAC, *Subclass 457 State/Territory summary report*, 2010-11 to 30 June 2011

5. The outlook for overseas migration

Key points

- The Australian Government's Department of Immigration and Citizenship (DIAC) forecasts Australia's total NOM to increase steadily to reach 204,400 by 2014-15.
- The NOM forecast for 2014-15 remains substantially lower than the 2008-09 peak of 299,860.

At the national level, DIAC forecasts Australia's NOM will increase steadily to 204,400 by 2014-15 (Table 5.1), an increase of 20.0 per cent from the ABS estimate of 170,300 in 2010-11. DIAC anticipates that as the Australian economy grows, there will be increasing demand for subclass 457 visa holders and working holiday makers. The contribution of international students to NOM is forecast to continue to ease in the short term before increasing again through 2013-14¹¹.

Table 5.1 NOM forecast^(a) by visa type, Australia

Visa type	2010-11	2011-12	2012-13	2013-14	2014-15
	— persons —				
Temporary visas	89,600	99,400	105,800	114,200	117,900
Permanent visas	83,400	91,400	92,200	92,400	93,400
Australian citizens	-12,900	-14,100	-15,900	-15,700	-15,700
New Zealand citizens	20,000	20,200	19,700	19,500	19,400
Other	-9,800	-10,000	-10,200	-10,400	-10,600
Total	170,300	186,700	191,500	200,000	204,400

(a) These forecasts take into account the economic outlook announced in May 2011 as part of the Australian Government's 2011-12 Budget.

Note: Source data are rounded to the nearest hundred. Total NOM figures may not equal the sum of components due to rounding.

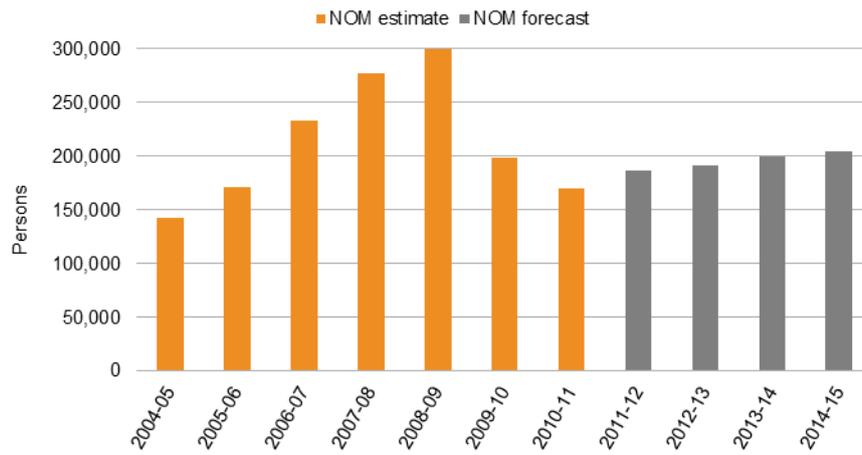
Source: DIAC, *The outlook for net overseas migration*, December 2011

The major contributors to the forecast change in NOM over the period 2010-11 to 2014-15 are an increase in temporary visas and a proportional decrease in the contribution of New Zealand citizens (from an estimated 11.7 per cent to a forecast 9.5 per cent).

The increases in total NOM forecast for Australia to 2014-15 represent a slow recovery from the large falls since 2008-09, and are roughly consistent with the long-term levels prior to 2005-06. By 2014-15, Australia's NOM is forecast to reach a level which is 61,900 higher than that of 2004-05, but still 95,500 lower than the peak in 2008-09 (Figure 5.1).

¹¹ DIAC, *The outlook for net overseas migration*, December 2011

Figure 5.1 NOM estimates and forecast, Australia



Source: DIAC, *The outlook for net overseas migration*, December 2011; ABS 3412.0, *Migration Australia*, 2009-10, data cube: Net overseas migration, Arrivals and departures, State/territory, age and sex – Calendar and Financial years, 2004 to 2011

Appendix 1. Technical notes

Net Overseas Migration Travellers' Characteristics Database

The Net Overseas Migration Travellers' Characteristics Database (TCDB) is maintained by the Australian Bureau of Statistics (ABS) using information supplied by the Australian Government Department of Immigration and Citizenship (DIAC). DIAC uses data-matched information from passports, visa applications and approvals, and passenger cards recording international travellers' intentions upon arriving to, or departing from, Australia.

The TCDB was designed to capture sufficient information about international travellers' movements to determine the number and characteristics of those who contribute to Australia's net overseas migration (NOM). NOM includes movements of all people who resided in Australia for 12 out of the 16 months prior to the reference period (the '12/16' rule), whether they were temporary or permanent residents. The 12/16 rule came into effect during 2006 and it applies to all annual NOM data from 2006-07.

The ABS has retrospectively calculated and published NOM figures under the 12/16 rule for 2004-05 and 2005-06, but did not adjust ERP for these periods. While they are useful for analysis of longer-term NOM trends, they are inconsistent with, and should not be compared directly with, ERP datasets (such as ABS 3101.0, *Australian Demographic Statistics*).

TCDB NOM data are available by age and sex, country of citizenship, and visa class and sub-class. Some NOM data are not available until 16 months after the reference period due to constraints associated with the 12/16 rule. Preliminary estimates of NOM are made quarterly and revised after 15 months according to travellers' actual duration of stay.

NOM data from the TCDB are reported at Section 2.

Permanent migration and humanitarian programs

The migration program is the means by which the Australian Government grants immigrants permission to remain permanently in Australia. It includes family and skill streams, and by definition excludes permanent settlers who do not require permission such as New Zealand citizens, returning Australian citizens and temporary entrants. Migration program data do not include departures.

The humanitarian program is closely related to, though administratively distinct from, the migration program. Under the humanitarian program, the Australian Government offers asylum and resettlement (with permanent resident status) to refugees and others suffering from human rights violations in their own countries. The humanitarian program can be accessed both on-shore (by applicants already in Australia) and off-shore (by those living in other countries).

Migration and humanitarian program data are reported by DIAC as both 'visas granted' and 'settlers' by permanent visa types. These figures vary substantially as not all migration program settlers arrive in Australia in the reference period in which their position is granted and not all migration program positions are taken up. Section 3

reports settler arrival data as these provide the clearest indication of the impact of the migration program on Queensland's resident population.

Stock of temporary entrants

DIAC maintains a detailed database on visas granted for temporary entrants. Information from this database is available quarterly by visa class and subclass. These data are recorded by DIAC as end-of-quarter stock and, because temporary entrants may arrive and depart within any given reference period, they do not necessarily reflect the total number of temporary entrant arrivals in any given year or quarter. The stock of temporary entrants contributes to NOM where individual entrants remain in Australia for 12 months out of the 16 months prior to the reference period.

While Australian Government policy can influence the type and number of temporary entrants to Australia, this component of NOM is largely uncapped and therefore subject to substantial variability. The number of temporary entrants living in Australia fluctuates throughout the year, and annual peaks vary across visa types. For example, the number of overseas students peaks in either March or September while the number of Other Tourist visitors generally peaks in December.

Temporary entrant stock data are presented in Section 4.1.

Overseas student enrolments

Australian Education International (AEI), within the Australian Government Department of Education, Employment and Workplace Relations (DEEWR), maintains a comprehensive database on overseas students in Australia (presented in Section 4.2 by calendar year to reflect the academic cycle). These data capture all students who enrol in Australian education institutions on overseas student visas.

AEI overseas student data are available monthly for both total enrolments (year to date) and total commencements (year to date). They are available by overseas students' Australian state of study and nationality. AEI data are closely related to the student visas reported in temporary entrant stock data, but do not match precisely due to definitional issues. Like other temporary entrants, overseas students are counted as part of Australia's resident population if they remain in Australia for 12 months out of any 16 month period.

Business (Long Stay) (subclass 457) visa grants

Australian employers may use the subclass 457 visa to employ overseas workers to fill nominated skilled positions in Australia. People employed from overseas on this visa are permitted to:

- work in Australia for a period of between one day and four years
- bring any eligible secondary applicants with them to Australia (secondary applicants can work and study)
- travel in and out of Australia any number of times after entering.

Detailed data on Business (Long Stay) (subclass 457 visas) entrants to Australia are maintained by DIAC (presented in Section 4.3). These data are presented as flow figures of temporary entrants (arrivals only) for given reference periods, and are

available monthly by entrants' country of birth and intended state and region of stay in Australia.

Net overseas migration forecasts

DIAC publishes forecasts of national NOM by major grouping on a quarterly basis (reported in Section 5). The forecasts are based on:

- current trends in visa grants
- past behaviour of migrants across different visa groups
- the impact of existing policy reforms
- official economic forecasts.

