

## National survey of ELICOS providers in Australia in 2017

This snapshot provides an overview of international students studying English Language Intensive Courses for Overseas Students (ELICOS) in Australia in 2017. The Department of Education and Training's international student data on enrolments and commencements relate only to international students studying in Australia on a student visa. The English Australia (EA) survey of English language studies in 2017 provides information about ELICOS students on all temporary visas, not just student visas. For a more current count of 2018 ELICOS enrolments and commencements by student visa holders only, please refer to the department's international student data.

In 2017, the EA survey of 210 institutions showed that student numbers studying ELICOS grew by 2.4 per cent to 177,697 (from 173,506 in 2016). The majority of the students studying ELICOS were on student visas (68%) followed by visitor (21%), working holiday (8%) and other (3%)<sup>1</sup> visas (Figure 1). Table 1 shows the differential growth of these student cohorts. ELICOS students on student visas grew by 4.4 per cent, led by China, and students on visitor visas grew by 7.1 per cent, led by Japan. The smaller cohort of students on working holiday visas declined by 13.8 per cent, led by declines from Japan and the number of students on other visa types declined by 16.3 per cent, led by declines from China. Figure 2 illustrates the changing shares of ELICOS students on different visa types over the last eight years, showing how ELICOS growth over the last six years has been led by student visa holders.

### Location

All other states except South Australia and Western Australia experienced overall growth in ELICOS students in 2017 when compared to 2016. Queensland had the largest growth at 15 per cent with almost half (48%) of ELICOS students on non-student visa types. Student numbers in ELICOS also grew in Victoria (6%) and New South Wales (2%)<sup>2</sup>. In South Australia and Western Australia numbers declined by 13 per cent and 28 per cent respectively. In 2017, 6 per cent of ELICOS students were with providers located in a regional area. The largest share of ELICOS students studying in a regional area were from Asia-Pacific (87%). Over half (52%) of students studying ELICOS in regional areas were on a visitor visa.

### Nationality

In 2017, the ELICOS sector continued to draw most of its students from the Asia-Pacific (68% up from 67% in 2016). China was the top source country for ELICOS students in all states except Queensland where Japan was the top source country for ELICOS students. China accounted for 24 per cent, making it the largest source country of all ELICOS students in 2017. The remaining top ten nationalities in order were: Japan, Brazil, South Korea, Colombia, Thailand, Taiwan, India, Italy and Vietnam. The top ten source countries together accounted for 77 per cent of ELICOS students in 2017. Five of the top ten source countries (China, Japan, Brazil, Colombia and India) showed increases in ELICOS students in 2017 compared to 2016. Eighty four per cent of Chinese students held a student visa, while visitor visa remained the most popular visa type for Japanese students (57%). The majority of students from other top nationalities held student visa in 2017 (ranging from 47% to 95%).

### Duration of study

Another important indicator of ELICOS student activity is total student weeks of study. Consistent with the overall growth in student numbers, this figure grew by 1 per cent in 2017. However, the average duration of study per student decreased slightly from 13.4 weeks in 2016 to 13.2 weeks in 2017.

Figure 1. ELICOS students by visa type in 2017

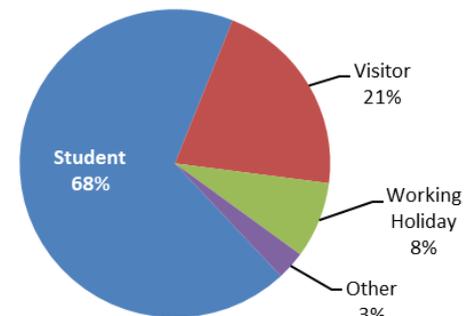
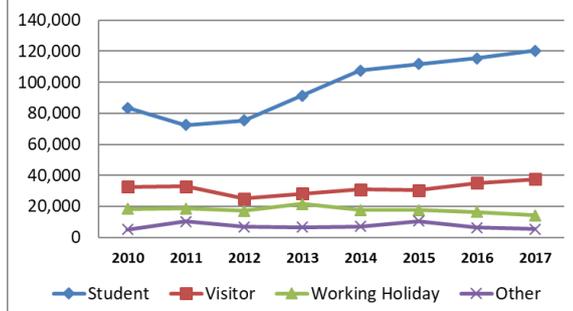


Table 1: ELICOS student numbers by visa types, 2016-2017

Visa Type	2016	2017	Growth on 2016
Student	115,401	120,437	4.4%
Visitor	35,040	37,539	7.1%
Working	16,542	14,260	-13.8%
Other	6,523	5,461	-16.3%
<b>Total</b>	<b>173,506</b>	<b>177,697</b>	<b>2.4%</b>

Figure 2. ELICOS student numbers by visa types 2010 - 2017



<sup>1</sup>Examples of Other visas include temporary relative, spouse or bridging visas

<sup>2</sup>The data for small states (too few providers) were combined with large states i.e. NSW/ACT, VIC/TAS, QLD/NT