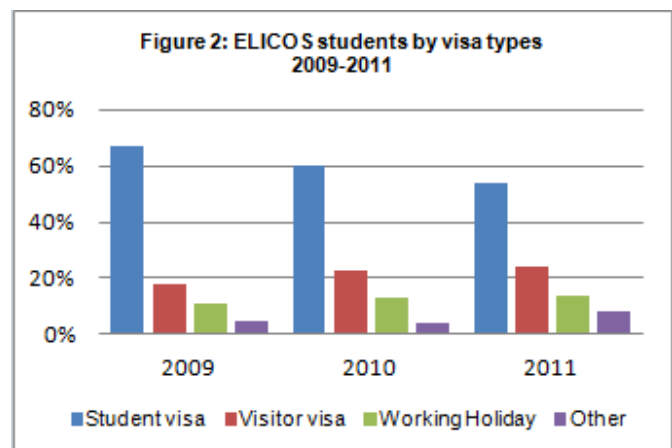
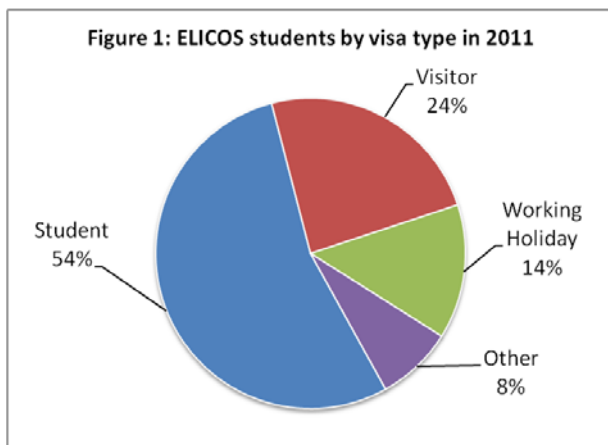




International Students in ELICOS sector in 2011

This research snapshot provides an overview of international students studying English Language Intensive Courses (ELICOS) in Australia in 2011. The source of information is the English Australia (EA) *Survey of Major ELICOS Regional Markets in 2011*, which includes ELICOS students on all visas including working holiday, visitor and other types. AEI data on enrolments and commencements relate only to international students in Australia on a student visa. The English Australia survey is supported by funding from AEI and its findings are weighted by known data from AEI regarding commencing ELICOS students who are studying in Australia on a student visa. This survey provides a useful picture of the proportional make-up of the total ELICOS student population. However, AEI international student data should be referred to for an accurate count of ELICOS enrolments by students visa holders.

The EA survey indicates that overall ELICOS enrolments declined by 4% dropping to 134,440 from 140,102 in 2010. The majority of students studying ELICOS held student visas (54%) in 2011 (Figure 1). In comparison to 2010, the number of students on visitor, working holiday and other types of visas grew but the number of student visa holders fell (Table 1). The estimated fall in numbers of students on student visas closely matches the fall seen in ELICOS student commencements (-13.5%) reported by AEI in 2011. Over the last three years, the proportion of ELICOS students on student visa decreased. Conversely, those on visitor, working holiday and other visas increased progressively over the same period (Figure 2). The proportion of ELICOS students on non student visas was higher in Queensland (54%) and Western Australia (59%). However, New South Wales (56%), South Australia (77%) and Victoria (65%) were popular among ELICOS students on student visas.



Nationality

Asia was the most important source region for ELICOS student enrolments (65%). China was the major source country accounting for 19% of all ELICOS students, although numbers dropped by 7% since 2010. The top ten source countries for 2011 in order were: China, South Korea, Japan, Brazil, Thailand, Taiwan, Colombia, Switzerland, Saudi Arabia and Vietnam. Of all ELICOS enrolments in 2011, 48% came from the top three source countries, the same as in 2010. Japan was the top source country for ELICOS students on non-student visas (81%) followed by South Korea (69%) and Taiwan (66%).

Of the top ten source countries, only Japan showed a modest growth (1%) since 2010. All other nine top source countries declined in enrolments; notably Vietnam which declined by 22% compared with 2010.

Duration of study

Although non-student visa students represented nearly half of all ELICOS students in 2011, the average duration of study by these students was 6.5 weeks. In comparison, the average duration of study by student visa holders was 15.3 weeks.

Table 1: ELICOS student number by visa types 2010 - 2011

Visa Type	2010	2011	% Growth 2010
Student	83,583	72,429	-13.3%
Visitor	32,710	32,866	0.5%
Working Holiday	18,527	18,734	1.1%
Other	5,281	10,411	97.1%
Total	140,102	134,440	-4.0%