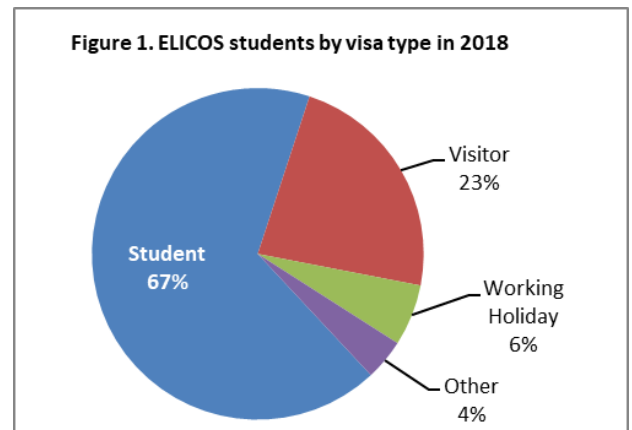




## National survey of ELICOS providers in Australia in 2018

This snapshot provides an overview of international students studying English Language Intensive Courses for Overseas Students (ELICOS) in Australia in 2018. The Department of Education'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 2018 provides information about ELICOS students on all temporary visas, not just student visas. For a more current count of 2019 ELICOS enrolments and commencements by student visa holders only, please refer to the department's international student data.

In 2018, the EA survey of 215 institutions showed that student numbers studying ELICOS grew by one per cent to 179,342 (from 177,697 in 2017). The majority of the students studying ELICOS were on student visas (67%) followed by visitor (23%), working holiday (6%) and other (4%)<sup>1</sup> visas (Figure 1). Table 1 shows the differential growth of these student cohorts. ELICOS students on student visas declined by almost 1 per cent and students on visitor visas grew by 7.9 per cent, led by Japan, China and South Korea. The smaller cohort of students on working holiday visas declined by 18.3 per cent, while the number of students on other visa types increased by 36.3 per cent. Figure 2 illustrates the trend of ELICOS students on different visa types over the last eight years, showing how ELICOS growth over the last six years until 2017 has been led by student visa holders. In 2018, growth was only seen in Visitor and 'Other' visa types.



**Table 1: ELICOS student numbers by visa types, 2017-2018**

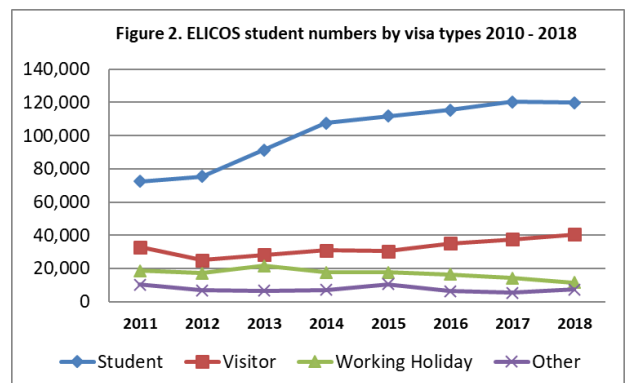
Visa Type	2017	2018	Growth on 2017
Student	120,437	119,735	-0.6%
Visitor	37,539	40,511	7.9%
Working	14,260	11,655	-18.3%
Other	5,461	7,441	36.3%
<b>Total</b>	<b>177,697</b>	<b>179,342</b>	<b>0.9%</b>

### Location

All states and territories except South Australia and Victoria experienced growth in ELICOS students on all visas in 2018. Queensland had the largest growth at 3 per cent with almost half (48%) of its ELICOS students on non-student visas. In 2018, 8 per cent of all ELICOS students were with providers located in a regional area. The majority of students studying ELICOS in regional areas were on student visas (48%) and visitor visas (46%).

### Nationality

In 2018, the ELICOS sector continued to draw most of its students from the Asia-Pacific (78% up from 68% in 2017). China was the top source country for ELICOS students in all states except Queensland where Japan was the top source country. China accounted for 24 per cent, making it the largest source country of all ELICOS students in 2018, although student numbers had only grown by 0.4% since 2017. The remaining top ten nationalities in order were: Japan, Brazil, South Korea, Colombia, Thailand, Taiwan, India, Vietnam and Spain. The top ten source countries together accounted for 77 per cent of ELICOS students in 2018. Five of the top ten source countries (China, Japan, Colombia, India and Vietnam) showed increases in ELICOS students in 2018 compared to 2017. Eighty two per cent of Chinese students held student visas, while visitor visas remained the most popular visa type for Japanese students (60%). The majority of students from other top nationalities held student visas in 2018 (ranging from 33% to 94%).



### Duration of study

Another important indicator of ELICOS student activity is total student weeks of study. In contrast to the overall growth in student numbers, this figure declined slightly (0.1%) in 2018. The average duration of study per student also decreased slightly from 13.2 weeks in 2017 to 13 weeks in 2018.

<sup>1</sup>Examples of Other visas include temporary, business, relative, partner, diplomatic, graduate and bridging visas etc.