



Visa grants for international students intending to study ELICOS

Student visa data provides a useful indicator of likely future international student enrolment trends in different education sectors. However, a separate analysis is required to identify future trends in the ELICOS sector as many international students study ELICOS as part of a study pathway rather than on an Independent ELICOS visa. This Research Snapshot summarises data available on all visa grants that included planned ELICOS study in the first half of 2020¹. A detailed data table is [here](#) including visas granted in or outside Australia. This analysis relies on several assumptions to generate the data and should be considered as indicative only.

In the period from January to June 2020, over half (51%) of primary student visa grantees intending to study ELICOS entered Australia on an Independent ELICOS visa, the remainder entered on other student visas corresponding to the endpoint of their intended study pathway (generally higher education or VET).

Table 1: Summary of student visa grants including an ELICOS course in January-June 2019 and 2020

Period	Total ELICOS	% change from previous year	Independent ELICOS	% change from previous year	Pathway ELICOS	% change from previous year
January-June 2019	39,552	-3%	18,990	6%	20,562	-11%
January-June 2020	21,410	-46%	10,938	-42%	10,472	-49%

All visa grants including an ELICOS course in the first half of 2020 declined by 46 per cent, compared to the same period in 2019 (Table 1). Much of the overall decline was due to a 67 per cent decline from China (Table 2), where China has been the top country for visas with ELICOS in recent years. In 2019, demand for ELICOS visas from China was already in decline (down 18% on 2018²). In 2020, that prior trend has been further exacerbated by COVID-19 related travel restrictions.

Table 2 shows proportions of students from different countries intending to study ELICOS on a pathway visa that was granted in the first half of 2020. For example, 95 per cent of Chinese and 33 per cent of Colombian students. Hence, just 5 per cent of Chinese and 67 per cent of Colombian students were intending to study ELICOS on an Independent ELICOS visa in the first half of 2020.

The 46 percent decline in all visa grants incorporating an ELICOS course suggests an equivalent decline in ELICOS enrolments may occur in the future unless current circumstances change. In the period January to June 2020 total ELICOS enrolments had declined by 11 per cent compared with the same period in 2019³. In this period, China remained Australia's largest source country for ELICOS enrolments (22% of all enrolments) followed by Colombia (15%) and Brazil (10%).

Table 2: Student visa grants including ELICOS by nationalities - January to June 2020

Nationalities	Visa with ELICOS	% change from previous year	% that were pathway visas
Colombia	4,005	-24%	33%
Brazil	2,983	-44%	31%
China	2,964	-67%	95%
Thailand	1,593	-33%	28%
Japan	1,497	-44%	24%
South Korea	860	-42%	49%
Chile	740	-34%	16%
India	646	-53%	78%
Nepal	605	-38%	83%
Vietnam	597	-43%	80%
Taiwan	476	-53%	69%
Spain	416	-61%	15%
Saudi Arabia	396	-43%	26%
Turkey	318	-25%	27%
Italy	285	-37%	27%
Mexico	225	-30%	29%
Malaysia	222	-43%	91%
Hong Kong	208	-5%	77%
Indonesia	204	-50%	83%
Mongolia	204	-57%	76%
Other	3,322	-41%	59%
Total	21,410	-46%	49%

¹ The visas with ELICOS data in this snapshot is drawn from the PRISMS system in the Department of Education, Skills and Employment, which incorporates enrolments and visa data transferred from the Department of Home Affairs.

² https://internationaleducation.gov.au/research/Research-Snapshots/Documents/RS_ELICOS%20Visas_2019.pdf