



National survey of ELICOS providers in Australia in 2019

This snapshot provides an overview of international students studying English Language Intensive Courses for Overseas Students (ELICOS) in Australia in 2019. International student data from the Department of Education, Skills and Employment relates only to international students studying in Australia on a student visa. The English Australia (EA) survey of English language providers in 2019 has information about ELICOS students on all temporary visas, not just student visas¹.

In 2019, the EA survey of 166 institutions reported that 169,864 ELICOS students were studying in Australia marks a five per cent decline from nearly 180,000 in 2018. Most students (70%) studying ELICOS were on student visas followed by visitor (20%), working holiday (6%) and other visas (5%)² (Figure 1).

Table 1 shows the changes over time for these student cohorts. ELICOS students on student visas declined by 1 per cent and students on visitor visas declined by 18 per cent, most of this decline being from the leading Asian markets Japan and China. Visitor visas declined by 27 per cent and 12 per cent respectively, when compared to 2018. The small cohort of students on working holiday visas also declined by 8 per cent, while the number of students on other visas increased by 4 per cent. Figure 2 illustrates trends over the last nine years, where student visas are the most popular visa type for ELICOS students, followed by visitor and working holiday visas. In 2019, there was only growth in 'other' visas.

Location

Apart from South Australia, all states experienced a decline in their ELICOS student population in 2019. The states most impacted by the decline were Queensland (8%) and New South Wales (7%) across all visa types. In 2019, 8 per cent of all ELICOS students were with providers located in a regional area, the same proportion as in 2018. The majority of students studying ELICOS in regional areas were on student visas (62%) and less than a third (31%) on visitor visas.

Nationality

In 2019, the ELICOS sector continued to draw most of its students from the Asia-Pacific (60% down from 78% in 2018). China was the top source country for ELICOS students in all states except Queensland where Japan was the top source country. China accounted for 21 per cent, making it the largest source country of all ELICOS students in 2019, although student numbers declined by 15% from 2018. The remaining top ten nationalities in order were: Japan, Brazil, Colombia South Korea, Thailand, India, Taiwan, Spain and Vietnam. The top ten source countries together accounted for 75 per cent of ELICOS students in 2019. Student visas were the most popular visa for all top nationalities except Japan, where visitor visas were the most popular (53%).

Duration of study

Another indicator of ELICOS student activity is total student weeks of study. In contrast to the overall drop in student numbers, this figure increased by 5 per cent in 2019. The average duration of study per student increased to 13.6 weeks.

Transnational Activity

Nine (9) Australian institutions reported delivering ELICOS programs to 8,872 students in China, Indonesia, Malaysia, Myanmar, Nepal, South Korea, Thailand and Vietnam in 2019. This experience may have contributed to the sector's prompt move to online course delivery in 2020 in the face of COVID-19 related travel restrictions.

Figure 1. ELICOS students by visa type in 2019

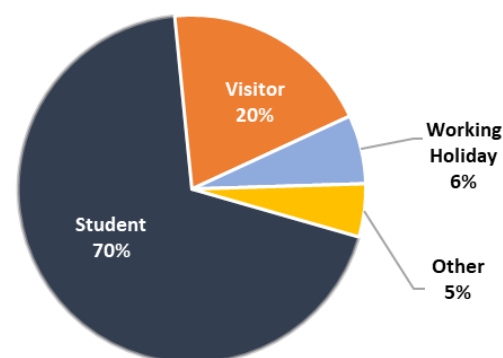
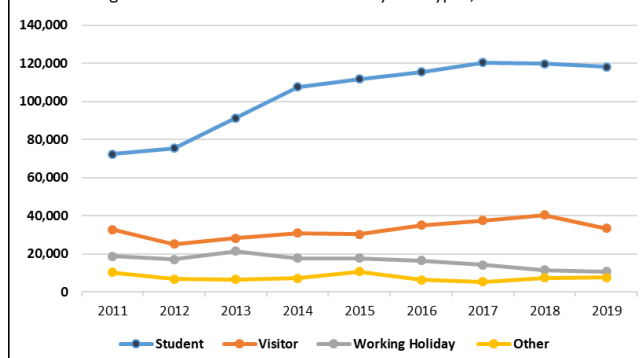


Table 1: ELICOS student numbers by visa types, 2018-2019

Visa Type	2018	2019	Growth on 2018
Student	119,735	118,112	-1.4%
Visitor	40,511	33,322	-17.7%
Working Holiday	11,655	10,673	-8.4%
Other	7,441	7,756	4.2%

Figure 2. ELICOS student numbers by visa types, 2011 - 2019



¹View [English Australia National ELICOS Market Report 2019: Executive Summary](#).

²Examples of other visas include temporary, bridging, dependent, business, permanent, partner, graduate, diplomatic, training visa etc. For more information, visit the [International Education](#) website of the [Department of Education, Skills and Employment](#) or contact IEResearch@dese.gov.au.