

English Australia

National ELICOS Market Report 2020: Executive Summary

June 2021

A report prepared for English Australia by BONARD June 2021

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Introduction

This report provides an annual overview of the performance of ELICOS providers in Australia. It analyses international students studying English language in Australia regardless of visa status.

For the fourth consecutive year, English Australia has commissioned BONARD to administer the survey. BONARD is a global market intelligence and strategic development company that specialises in the international education sector. The company is a UNWTO Affiliate Member, with individual memberships in ESOMAR World Research.

This year's edition provides insights into:

- global student mobility
- student numbers by nationality
- student numbers by visa type
- student numbers by age group
- student numbers by booking source
- student numbers by enrolment type
- length of enrolments
- enrolments in each state and territory
- provider and campus type
- city and regional locations
- age segment and student booking source

This report also provides BONARD's global data on the English language travel teaching (ELT) industry, focusing on key performance indicators such as Australia's market share in selected source countries. This year's edition will address the impact of Covid-19, specifically market recovery and how the sector reacted to the changes in delivery mode and travel restrictions.

Note to the reader

In preparing this report, we have presented and interpreted the most relevant information. While we have made every effort to provide accurate information, data derived from sample-based surveys are estimates and you should regard them as such. Where we have made assumptions when interpreting the data, we have attempted to clearly set out these assumptions. We have noted where we have expressed our professional opinion rather than simply providing empirical data. Please ensure you consider these assumptions if you use the report for decision-making. We welcome further discussion and feedback on the analysis in the report.

Executive Summary

2020 IN REVIEW

Fig 1. Total student numbers in Australia
○ 2019 ○ 2020



Fig 2. Total student weeks in Australia
○ 2019 ○ 2020

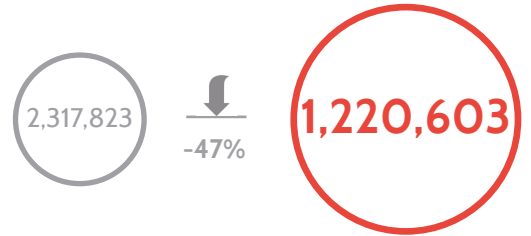
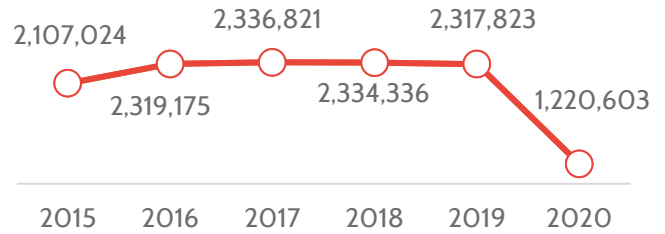


Fig 3. Total student numbers in Australia
○ 2019 ○ 2020



Fig 4. Total student weeks in Australia
○ 2019 ○ 2020



MARKET PARAMETERS

Fig 5. Average length of stay
○ 2019 ○ 2020

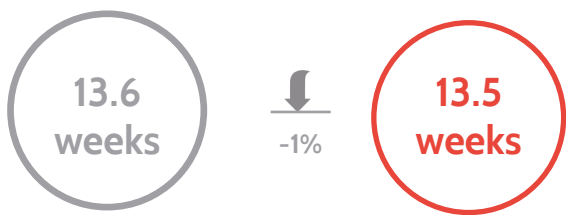


Fig 6. Economic impact (billions)
○ 2019 ○ 2020

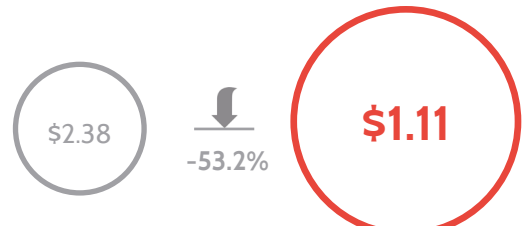
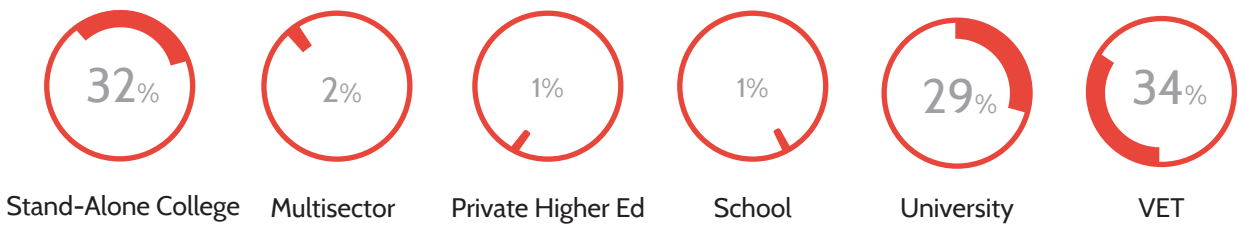


Fig 7. Market share by provider type
○ 2019 ○ 2020



STUDENT PROFILE

Fig 8. Student numbers by visa type

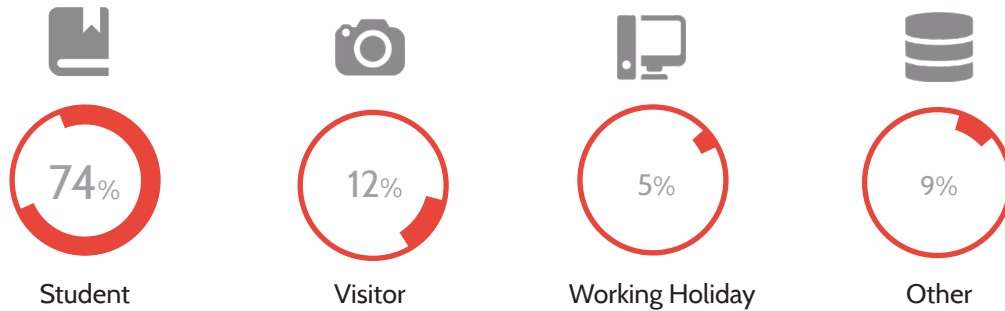


Fig 9. Student numbers by age group

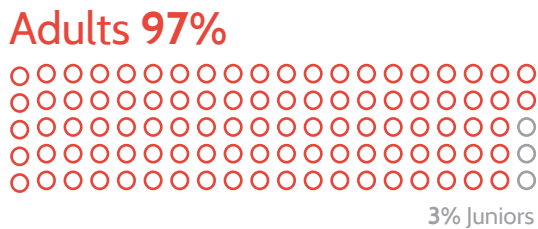


Fig 10. Student numbers by booking type



Fig 11. Student numbers by enrolment type

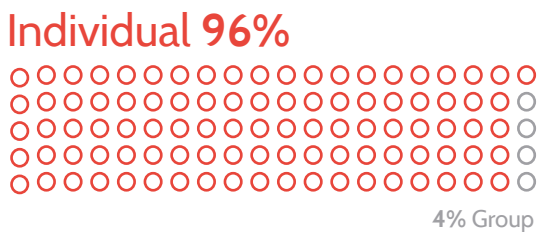
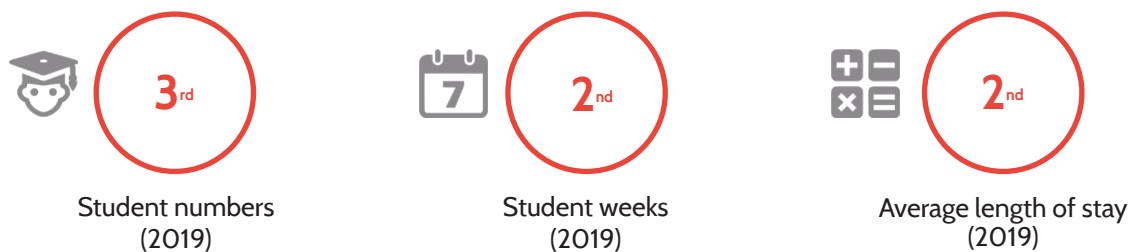


Fig 12. Student numbers by provider location



GLOBAL RANK

Fig 13. Australia's global position



STATE HIGHLIGHTS

Fig 14. Overview of states

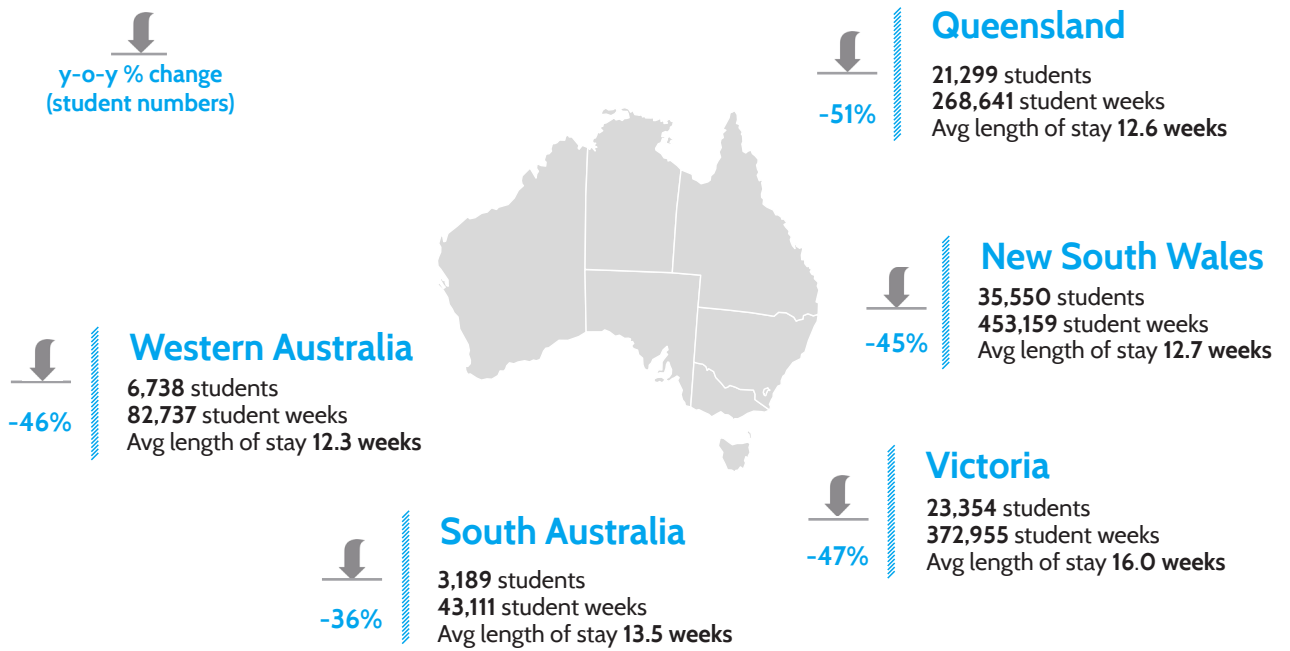


Fig 15. Student numbers by state

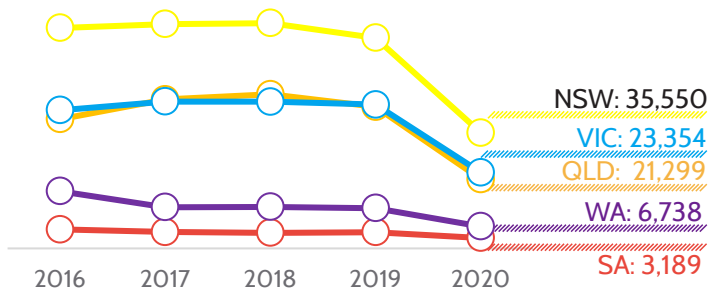


Fig 16. Student numbers by state and visa type (%)

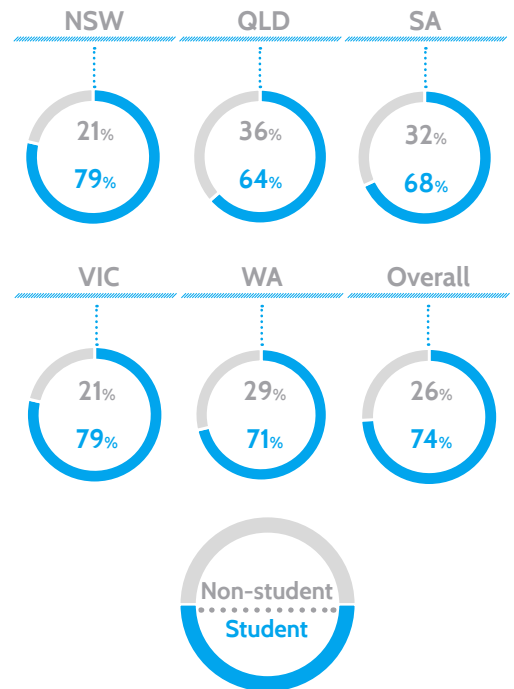
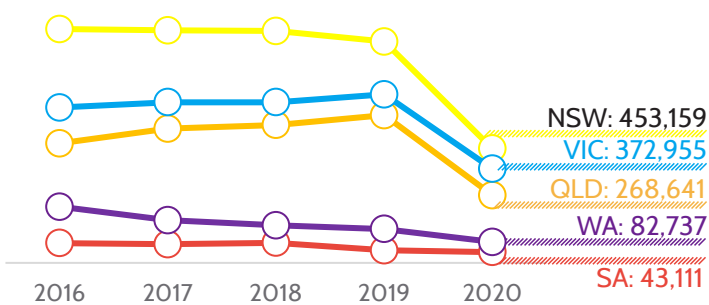


Fig 17. Student weeks by state



REGIONAL HIGHLIGHTS

Fig 18. Overview of source regions

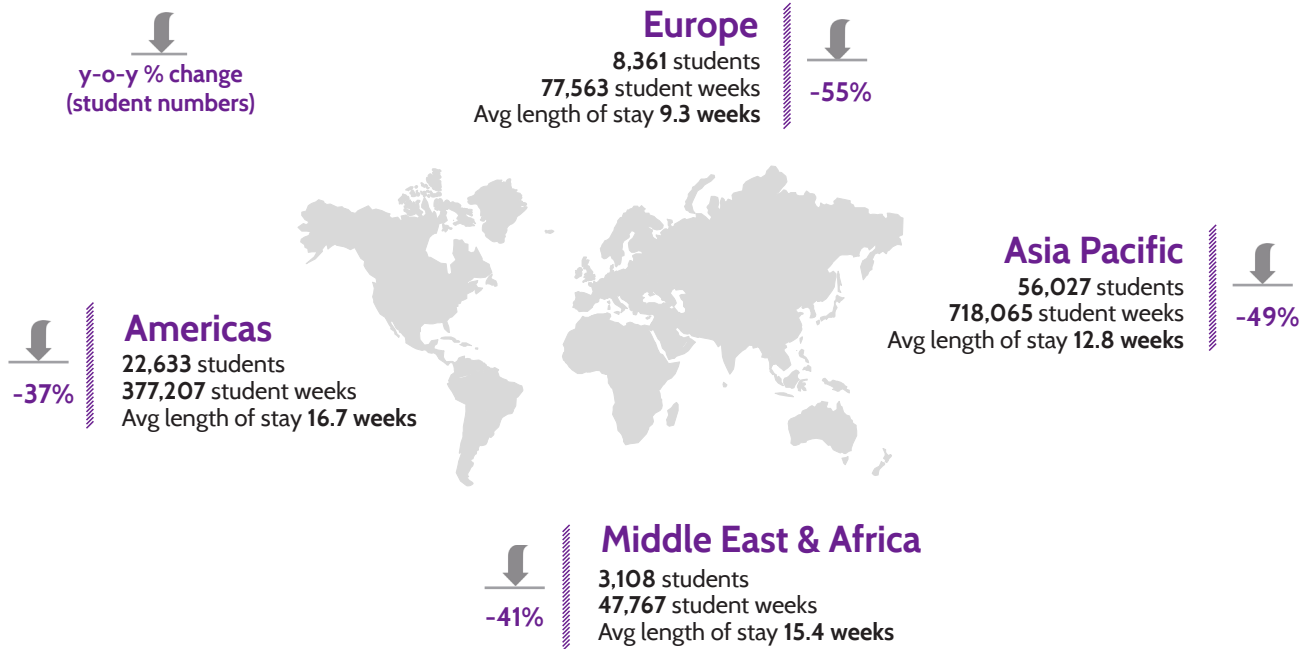


Fig 19. Student numbers by source region

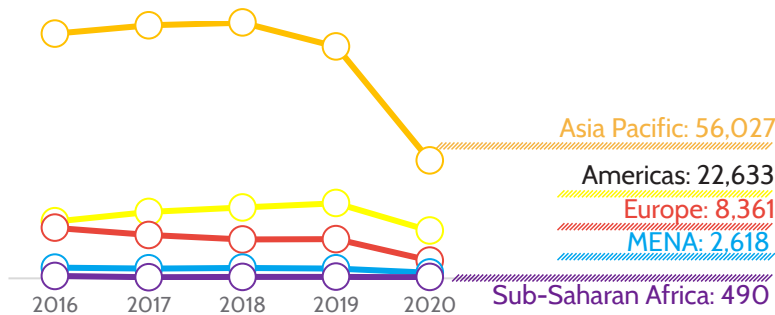


Fig 20. Australia's market share in major regions (student weeks, 2019)

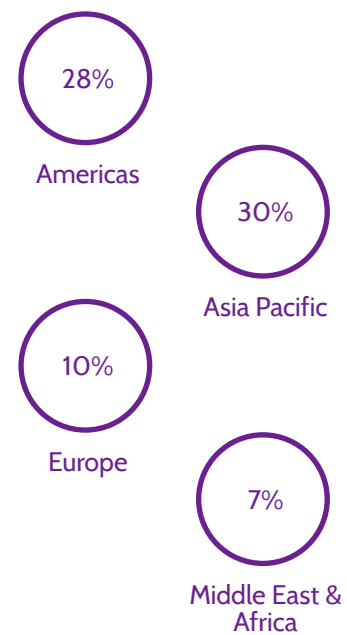
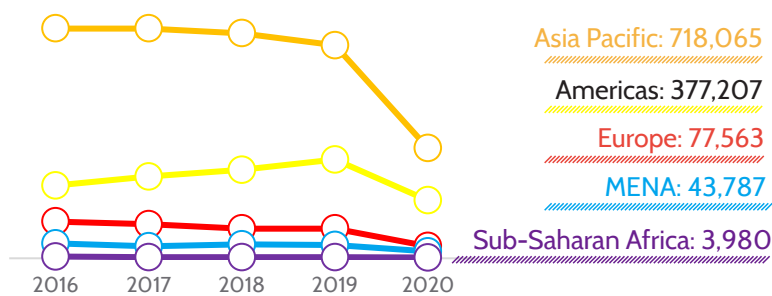
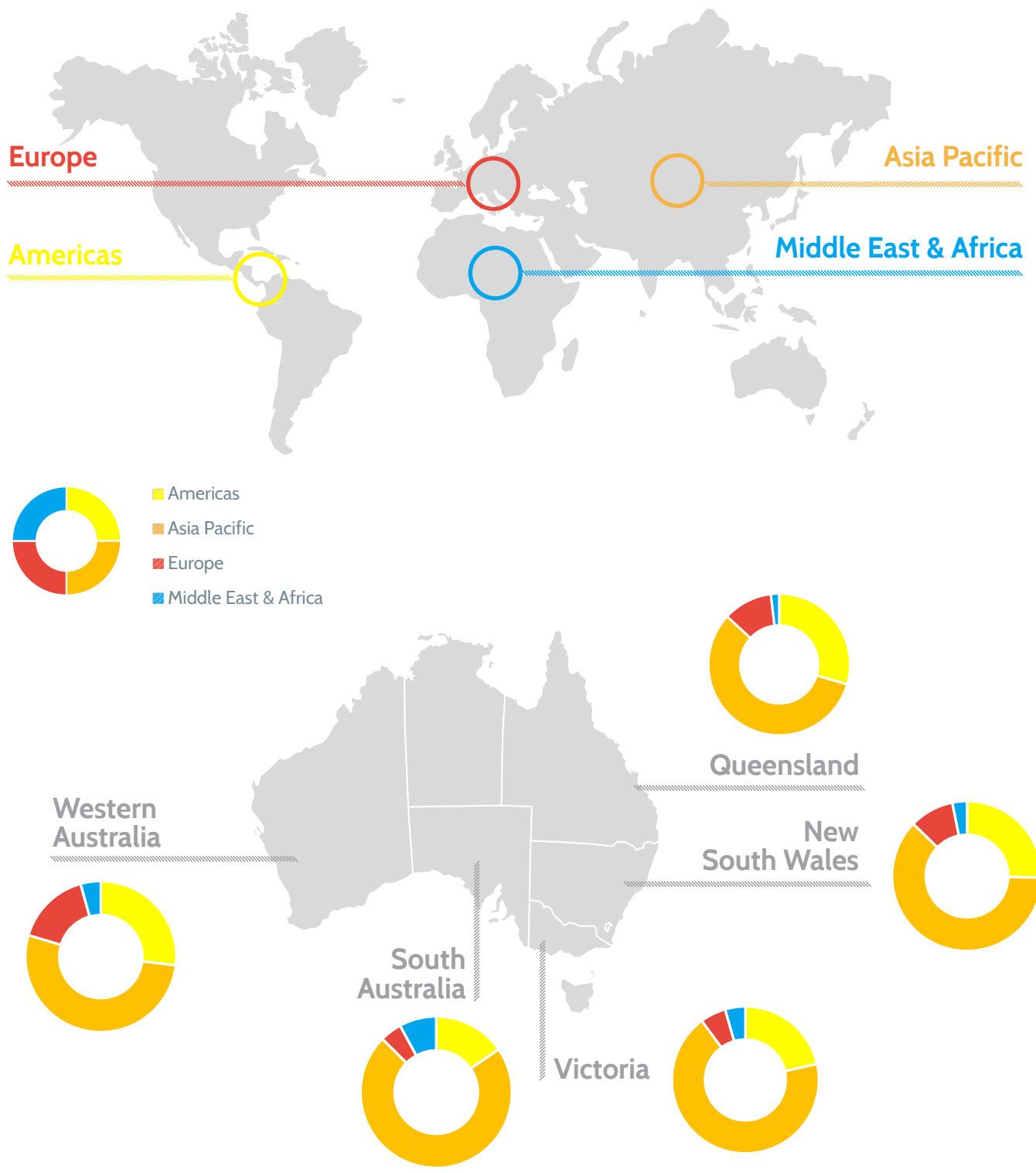


Fig 21. Student weeks by source region



REGIONAL HIGHLIGHTS

Fig 22. Overview of student flows between source regions and states



TOP TEN SOURCE COUNTRIES

Fig 23. Overview of top 10 source countries

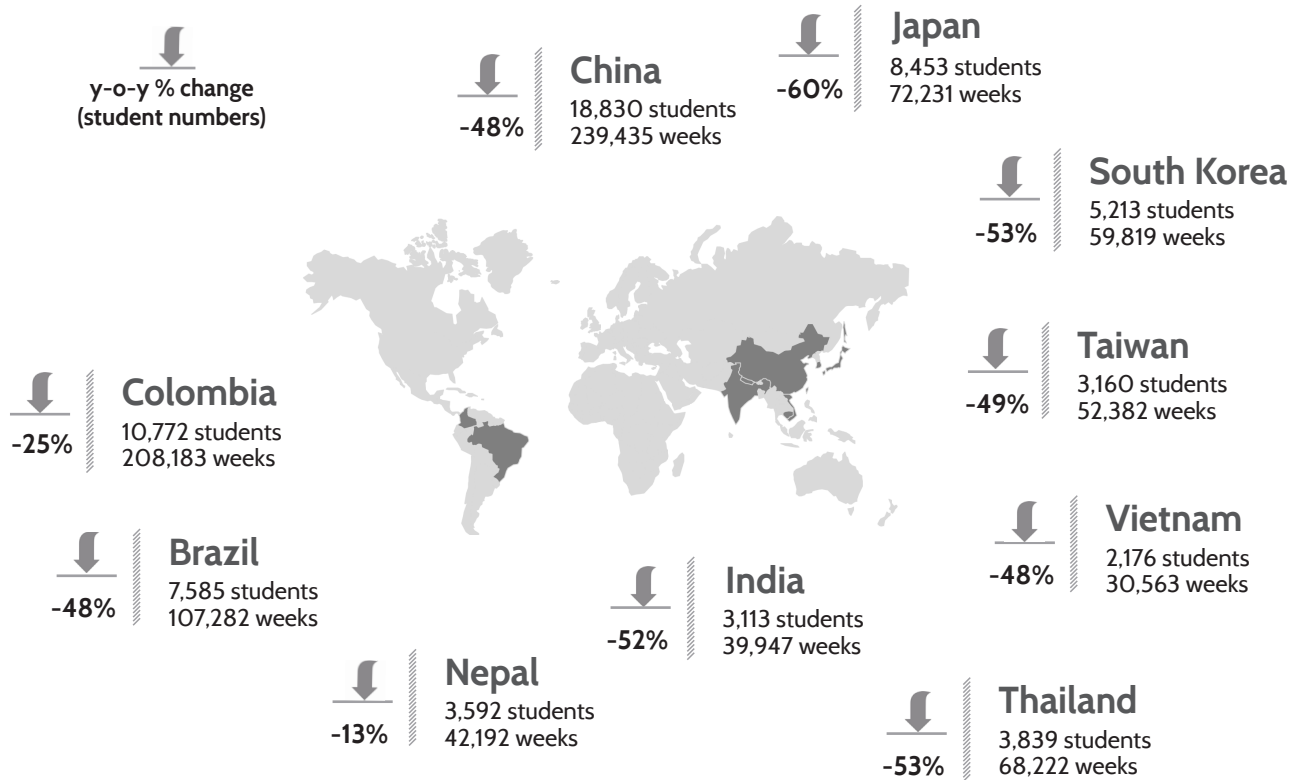


Fig 24. Top five countries with the largest increase (student numbers)

Source country	2019	2020	# Change	% Change
Kenya	168	302	+134	+80%
Oman	122	222	+100	+81%
East Timor	47	64	+17	+37%
Belarus	2	15	+13	+656%
Macedonia	45	58	+13	+28%

Fig 25. Share of top 10 source countries

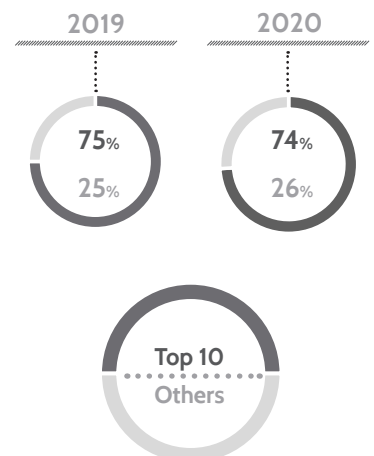


Fig 26. Top five countries with the largest decrease (student numbers)

Source country	2019	2020	# Change	% Change
China	36,234	18,830	-17,404	-48%
Japan	20,937	8,453	-12,483	-60%
Brazil	14,627	7,585	-7,042	-48%
South Korea	11,106	5,213	-5,893	-53%
Thailand	8,201	3,839	-4,363	-53%

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