

English Australia

National ELICOS Market Report 2018: Executive Summary

June 2019

The English Australia National ELICOS Market Report 2018 is supported by the Australian Government Department of Education. For further information, please visit the website <www.education.gov.au> or <www.internationaleducation.gov.au>.



Australian Government
Department of Education

A report prepared for English Australia by BONARD
June 2019

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Introduction

This report summarises the results of the national survey of ELICOS providers in Australia. The research delivers unparalleled analysis of international students studying English language in Australia – regardless of their visa status.

For the second consecutive year, English Australia commissioned BONARD to administer its 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 following insights:

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

As well as analysing the age and booking source of students, this report delivers global perspectives and breakdowns that will help benchmark Australia's position as a study destination. Leveraging BONARD's global data on the English language travel industry, the report determines key performance indicators such as Australia's market share in selected source countries.

Note to the reader

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

Executive Summary

2018 IN REVIEW

Fig 1. Total student numbers in Australia
○ 2017 ○ 2018

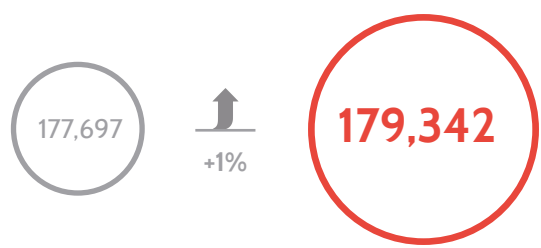


Fig 2. Total student weeks in Australia
○ 2017 ○ 2018

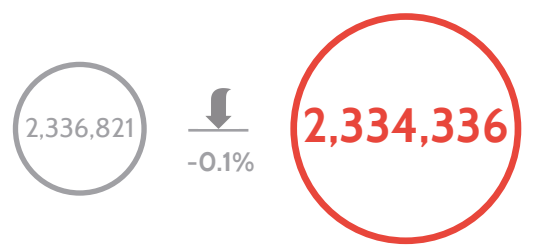


Fig 3. Total student numbers in Australia

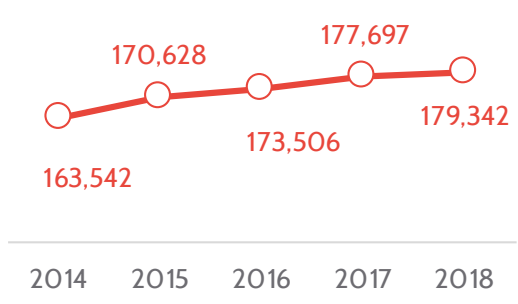
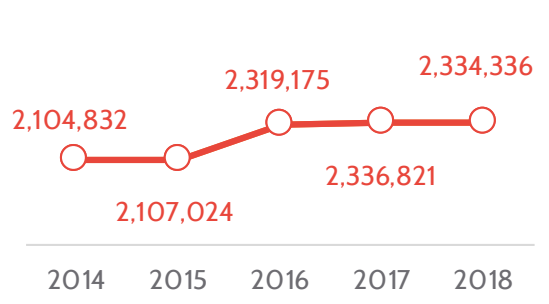


Fig 4. Total student weeks in Australia



In 2018, the ELICOS sector accounted for 179,342 international students, which marked a y-o-y increase of 1 per cent. Student numbers grew more slowly when compared to previous years. However, for the first time since 2012, student weeks declined to a total of 2,334,336. This represents a decrease of 0.1 per cent over 2017. The average length of stay dropped from 13.2 weeks in 2017

to 13 in 2018. New South Wales continued to attract the majority of ELICOS students, representing 39 per cent of all students, while Queensland was the fastest-growing state between 2017 and 2018. The economic footprint of ELICOS students grew by 1.4 per cent y-o-y. The overall contribution of the ELICOS sector to the Australian economy equalled \$2.35 billion.

Fig 5. Average length of stay
○ 2017 ○ 2018

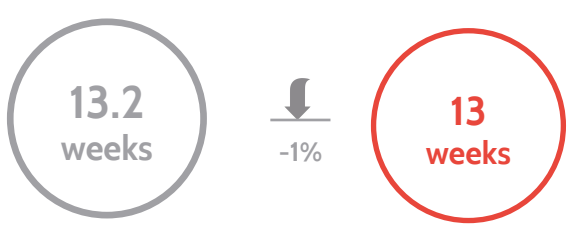


Fig 6. Economic impact (billions)
○ 2017 ○ 2018



MARKET PARAMETERS

Of the six designated provider types, stand-alone colleges covered the majority of ELICOS students in Australia (39% of all students). They were followed by VET institutions (27%) and university-based language centres (24%). The remaining designated CRICOS

providers, namely multisector, private higher education institutions and schools, accounted for 10 per cent of all ELICOS students. In terms of student weeks, stand-alone colleges represented the provider type with the highest percentage share (37%).

Fig 7. Market share by provider type

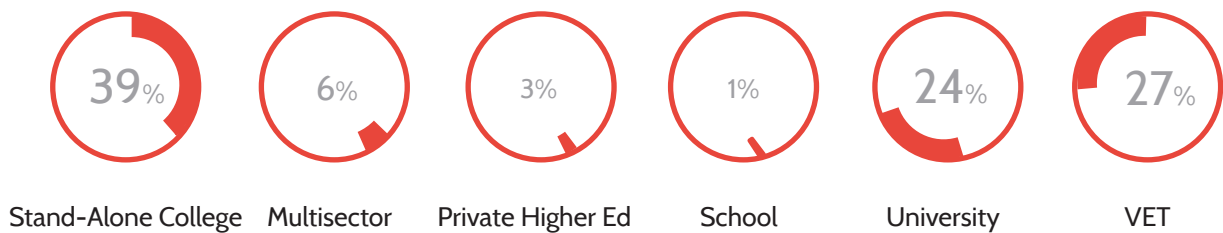


Fig 8. English Australia market share



English Australia’s membership base catered for 77 per cent of all ELICOS students. An equal proportion of student weeks was also registered by English Australia’s members. English Australia’s members showed a relatively consistent share across all source regions.

Member colleges had the highest coverage in the Middle East and North Africa region, accounting for 87 per cent of all student numbers and 90 per cent of all student weeks. Furthermore, English Australia’s members grew in student numbers (+1,585) from the Asia Pacific.

GLOBAL RANK

Fig 9. Australia’s global position

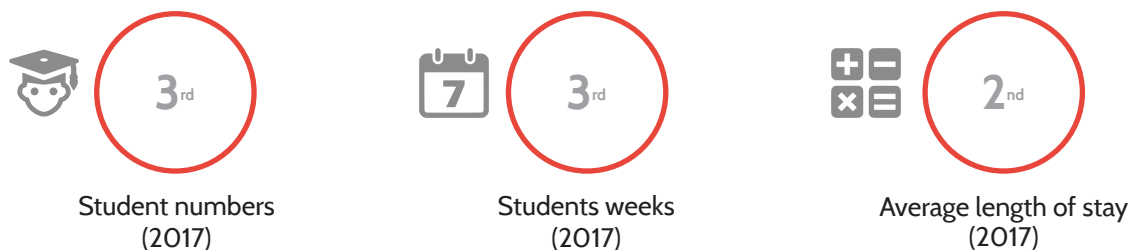
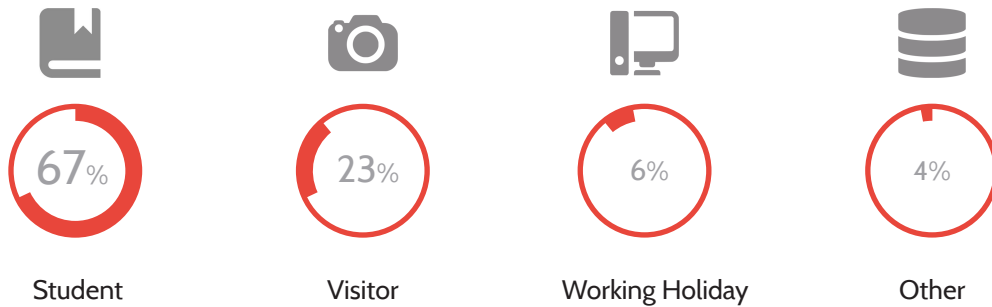


Fig 10. Student numbers by visa type



Student visa holders accounted for 67 per cent of all enrolments, constituting the largest visa category in Australia. Increasingly, English learners are studying on visitor visas (+2,972), this continuing a trend that began in

2015. The top three source countries for ELICOS students entering Australia on visitor visas were Japan, China and South Korea. Cumulatively, they made up 63 per cent of all visitor visa holders.

Fig 11. Student numbers by age group

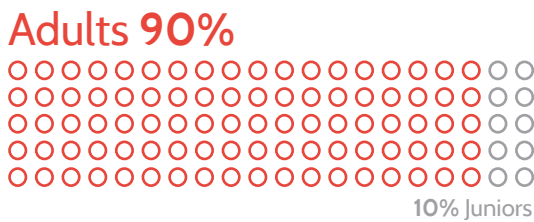


Fig 13. Student numbers by enrolment type



In 2018, the market share of group enrolments rose from 9 per cent to 10 per cent of all enrolments. As group travel to Australia for the purpose of studying English is a domain of Asian countries, these countries increased their share to 95 per cent of all group enrolments (94% in 2017).

Fig 12. Student numbers by booking type



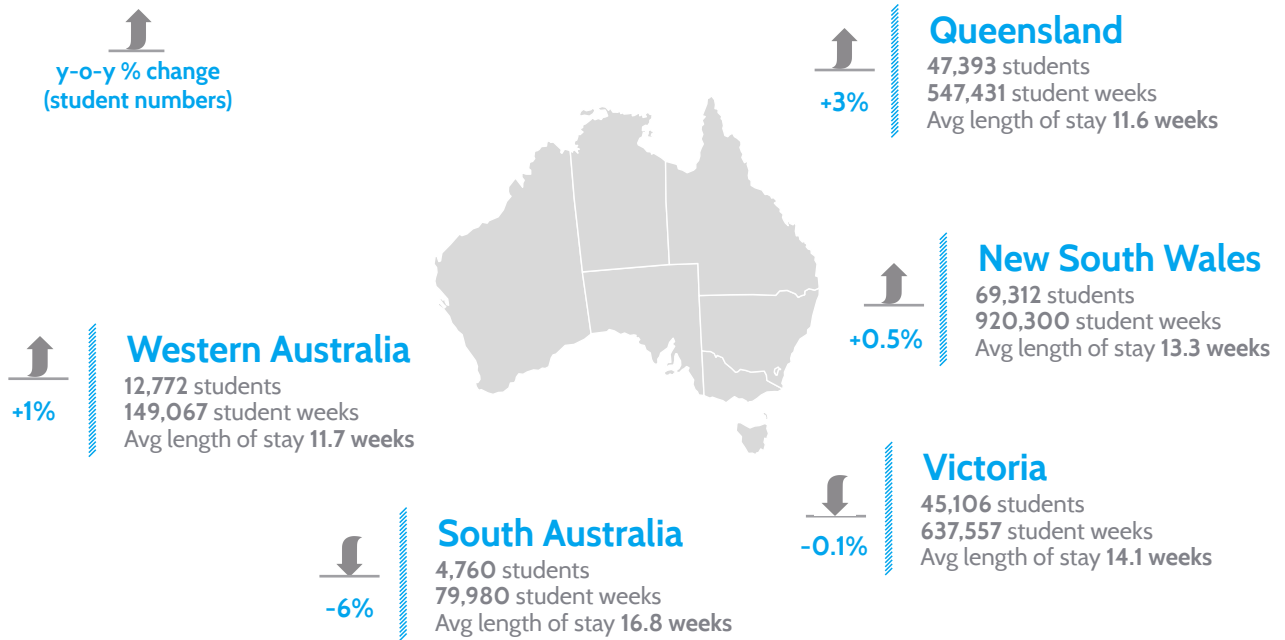
Fig 14. Student numbers by provider location



On average, 83 per cent of all bookings in 2018 were commissionable through an education agent. Queensland recorded the highest percentage of direct bookings (20%), whereas Victoria had the highest proportion of bookings via education agents (87%).

STATE HIGHLIGHTS

Fig 15. Overview of states

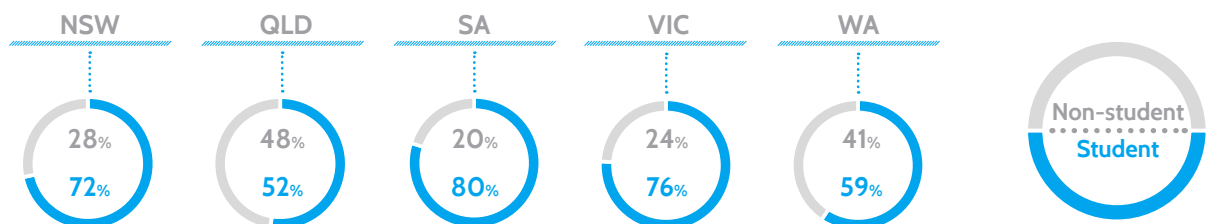


Across Australia, ELICOS students' profiles varied considerably. This variation was reflected in the breakdown of both visas and nationalities as well as the specific provider types at which students preferred to study.

New South Wales, the most populous state for ELICOS students, mirrored the national enrolment development with student numbers increasing by 0.5% and student weeks decreasing by 0.3%. The strongest growth occurred in Queensland, with a y-o-y increase of 3 per cent in student numbers and student weeks. South Australia and Victoria dropped in student numbers. Although South Australia's student numbers decreased y-o-y by 6 per cent, the average length of stay increased to 16.8 weeks (14.7 weeks in 2017).

This increase led to a growth in student weeks (8%) for South Australia. The Asia Pacific remained the main source region for all states. Asian students were especially present in South Australia, where they comprised 79 per cent of all enrolled ELICOS students. The Americas posted a positive development, which saw the region increase its market share by 2 per cent. Student visas were the most commonly used visa type in each state. Queensland held the lowest share of student visa holders, who accounted for 52 per cent of all students. This was caused by a high number of visitor visa holders entering the ELICOS sector in Queensland. Queensland also reported the highest percentage of students enrolled as members of a group (18%). Group enrolments increased in most states except Victoria.

Fig 16. Student numbers by state and visa type



STATE HIGHLIGHTS

Fig 17. Student numbers by state

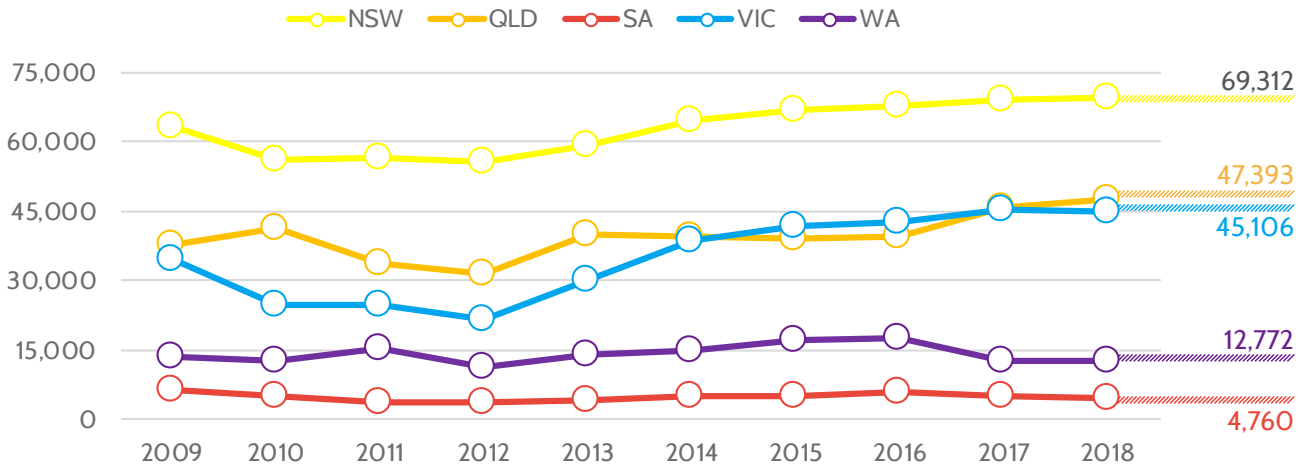


Fig 18. Student weeks by state

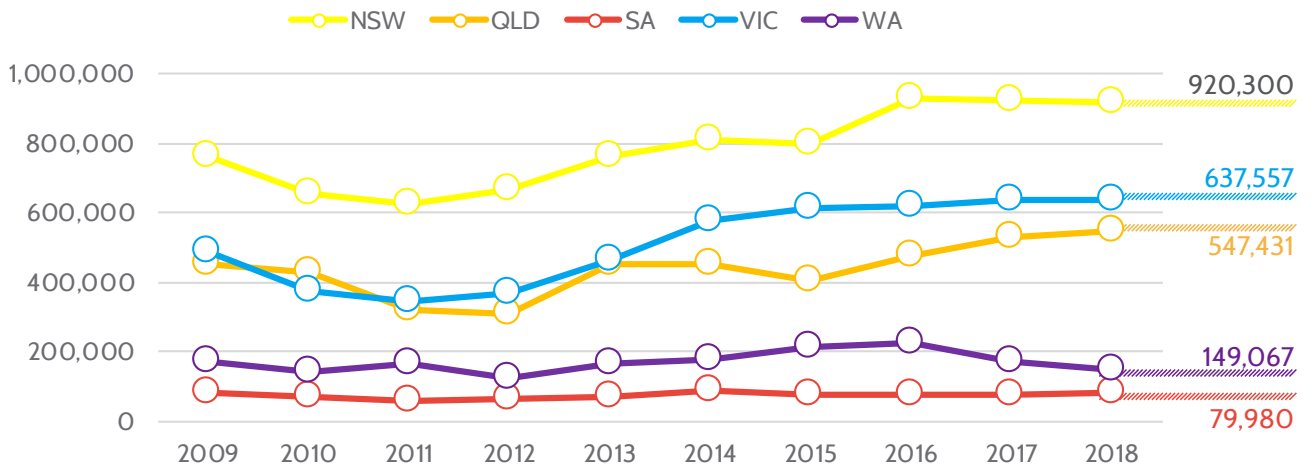
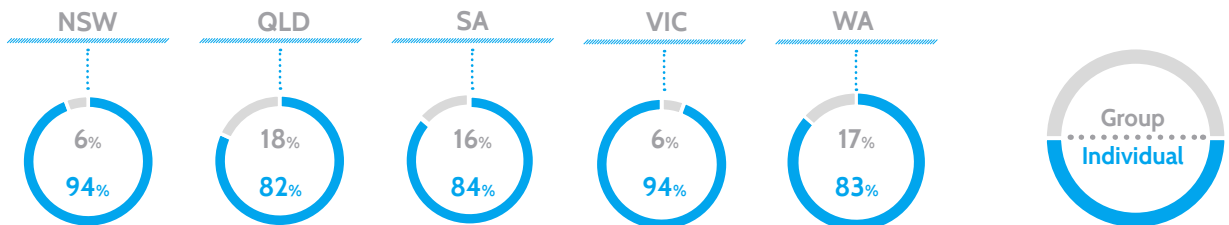
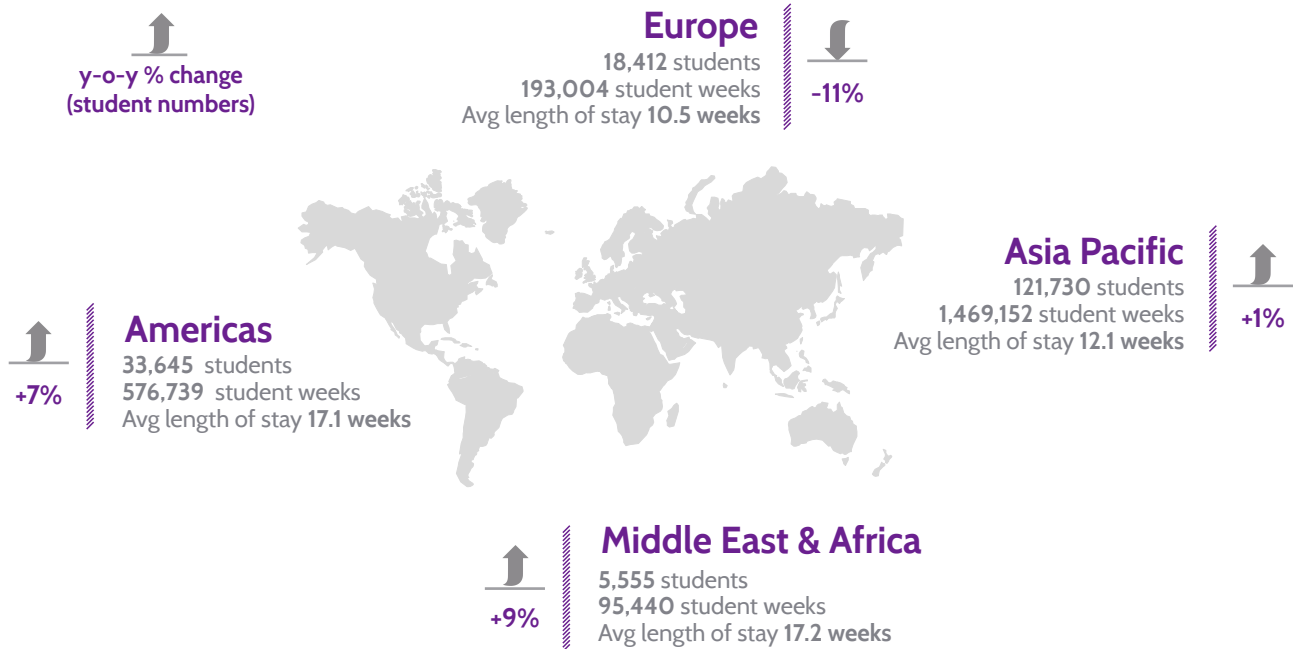


Fig 19. Student numbers by state and enrolment type



REGIONAL HIGHLIGHTS

Fig 20. Overview of source regions



The Asia Pacific and the Americas remained the major source regions of English language students coming to Australia. Student numbers from the region grew slightly at 1 per cent (compared to +3% in 2017). China maintained its position as the biggest source country for Australia, although it remained flat compared to 2017 figures. The growth was fuelled by India (+776) and Malaysia (+401) as well as emerging markets such as Mongolia (+726) and Nepal (+220). In absolute numbers, Americas registered a y-o-y increase of 2,118 students. The increase was driven by ELICOS students from Colombia (+1,508), who accounted for 71 per cent of the growth from the region. Since 2014, ELICOS student numbers from Europe have

declined. In 2018, they dropped by a further 11 per cent from 2017. The top source countries, Italy, France, Switzerland and Germany, reduced their market share for the third year in a row. Consequently, Italy was no longer among the top 10 markets for Australia in 2018. France saw the largest drop in absolute student numbers (-699) of all European countries. The Middle East and Africa represented the smallest source region for Australia, accounting for 3 per cent of all students. The region grew by 458 ELICOS students, which translated into a 9 per cent y-o-y increase – posting a positive market performance compared to 2017 when it declined by 18 per cent. Students from Saudi Arabia increased by 20 per cent, driving the overall growth.

Fig 21. Average length of stay (weeks) by source region

Source region	2014	2015	2016	2017	2018	% Change
Americas	15.4	15.1	17.6	16.9	17.1	+1%
Asia Pacific	12.8	12.1	12.9	12.5	12.1	-3%
Europe	9.9	9.5	9.9	10.7	10.5	-2%
Middle East & North Africa	17.6	16.8	19.1	16.6	18.1	+9%
Sub-Saharan Africa	6.7	8	10	11.9	10.2	-15%

REGIONAL HIGHLIGHTS

Fig 22. Student numbers by source region

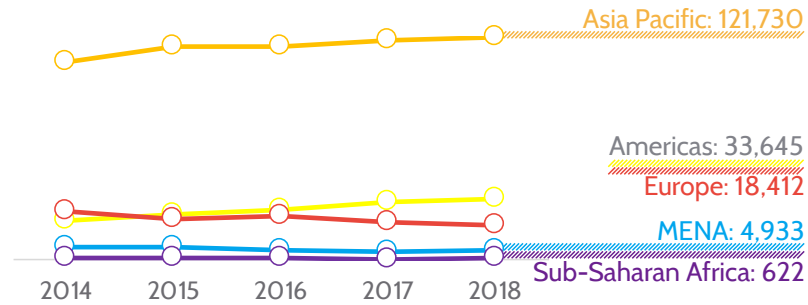


Fig 23. Student weeks by source region

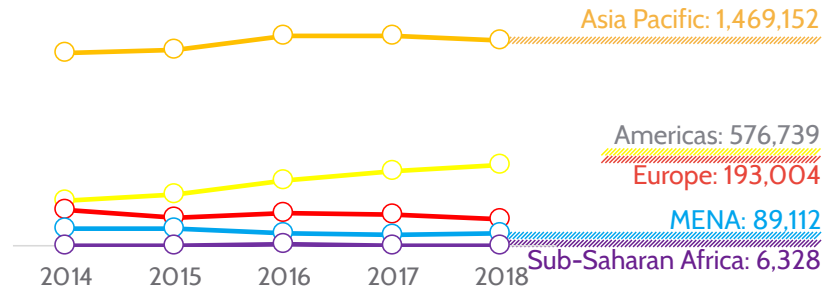
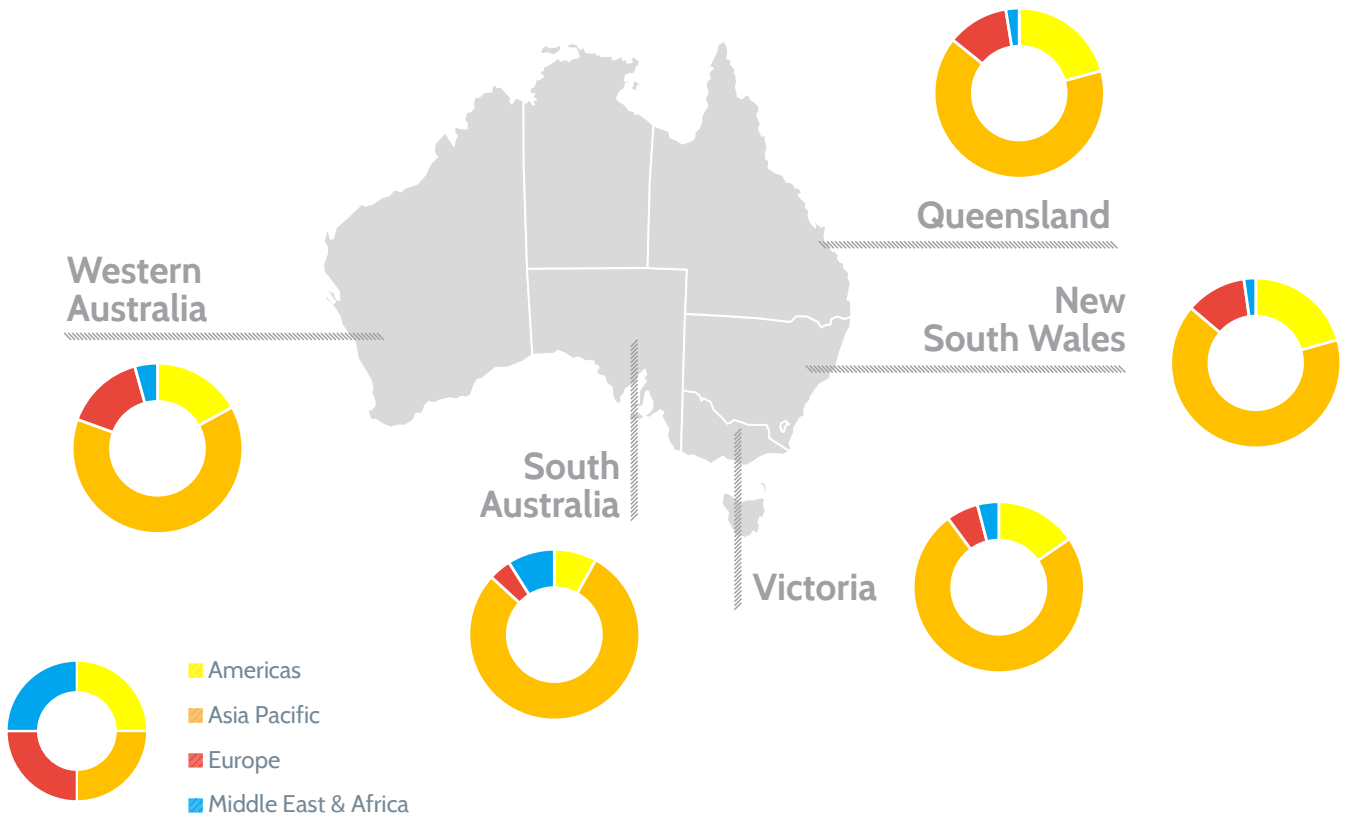
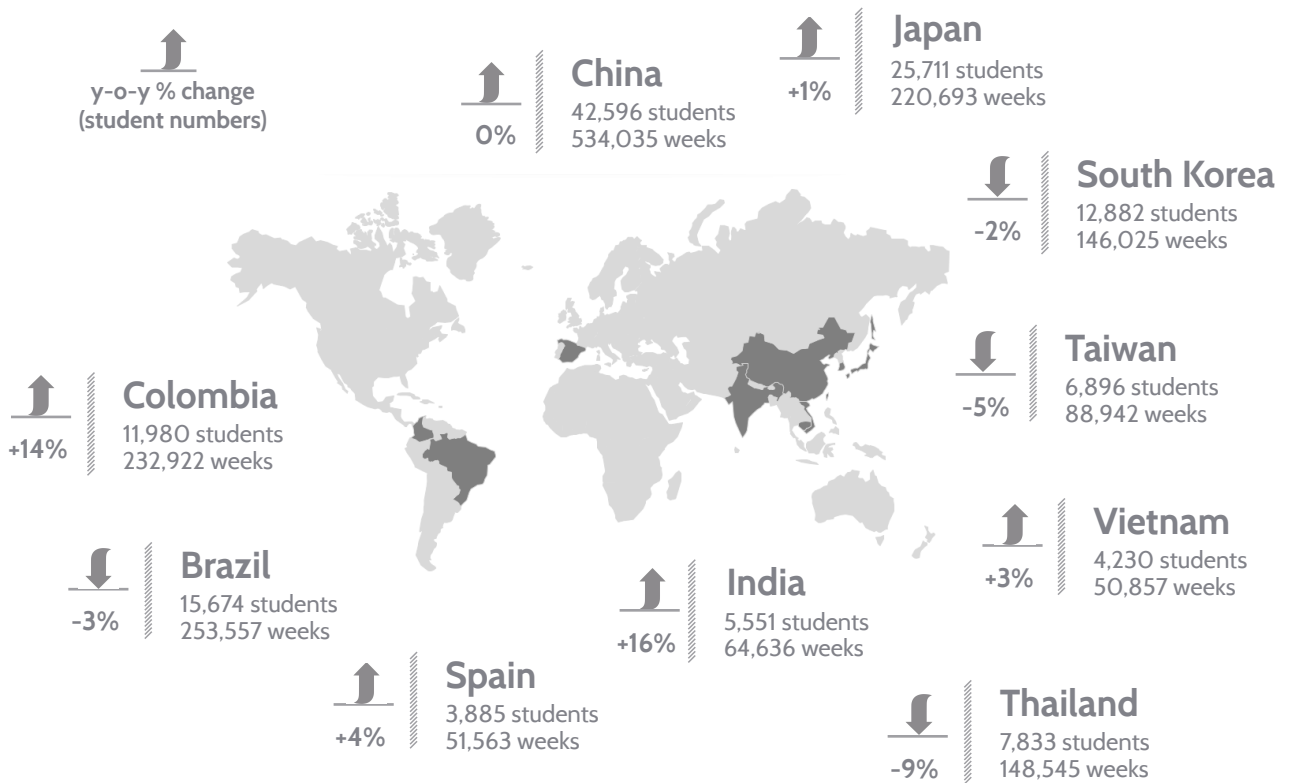


Fig 24. Overview of student flows between source region and state



TOP TEN SOURCE COUNTRIES

Fig 25. Overview of top 10 source countries



This key performance indicator reveals how well-established Australia is in these markets and helps assess the potential for further growth.

In 2018, the list of top ten source markets featured one newcomer, with Spain overtaking Italy to attain tenth spot. Vietnam rose in the rankings, taking ninth position. The top ten source countries represented 77 per cent of all ELICOS students in Australia in 2018.

Their market share remained the same as in 2017 despite a decrease in enrolments from Brazil (-3%), Thailand (-8%) and Taiwan (-3%). Japan registered a modest y-o-y increase of 1 per cent, whereas China, the top source market, remained flat.

Growth came from Colombia and India, both experiencing double-digit increases in the number of ELICOS students (+14% and +16% respectively).

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

Source country	2017	2018	# Change
Colombia	10,472	11,980	+1,508
India	4,775	5,551	+776
Chile	2,137	2,899	+762
Mongolia	1,452	2,179	+726
Saudi Arabia	2,280	2,734	+454

Source country	2017	2018	# Change
Thailand	8,576	7,833	-743
France	3,593	2,894	-699
Brazil	16,165	15,674	-491
Germany	1,734	1,250	-484
Italy	4,129	3,778	-351

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