English Australia

National ELICOS Market Report 2019: Executive Summary

June 2020

ENGLISH AUSTRALIA

QUALITY | SUPPORT | ASSURANCE

A report prepared for English Australia by BONARD
June 2020

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Department of Education, Skills and Employment

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Table of Contents

Acknowledgments 4
Foreword 5
Introduction 6
Methodology 7
Executive Summary 8

GLOBAL OVERVIEW

14 Global Overview

ELICOS MARKET IN AUSTRALIA

18 Source Regions
19 Source Countries
20 Visa Status
22 Enrolment Type
23 Age Groups
24 Booking Source
25 Provider Location
26 Provider Type
28 English Australia Membership Profile
29 Economic Impact

STATE SUMMARIES

32 New South Wales
36 Queensland
40 South Australia
44 Victoria
48 Western Australia

SOURCE REGIONS

54 Asia Pacific
Source Countries
Visa Status
Enrolment Type
Provider Location and Type
Economic Impact

60 Americas
Source Countries
Visa Status
Enrolment Type
Provider Location and Type
Economic Impact

66 Europe
Source Countries
Visa Status
Enrolment Type
Provider Location and Type
Economic Impact

72 Middle East & Africa
Source Countries
Visa Status
Enrolment Type
Provider Location and Type
Economic Impact

TOP TEN SOURCE COUNTRIES

80 China
81 Japan
82 Brazil
83 Colombia
84 South Korea
85 Thailand
86 India
87 Taiwan
88 Spain
89 Vietnam

Appendix
Data Weighting 90
Participating Institutions 94

Acknowledgments

We would like to acknowledge the support of ELICOS institutions who participated in this edition of the survey. Their contribution is instrumental to this project and we would like to express our gratitude to all participating colleges.

The BONARD Team

Foreword

For the first time since 2012, the ELICOS sector has recorded a decrease in student numbers. The discussions with members throughout the year prepared me for this result. Interestingly, 2019's student visa commencement data recorded a one per cent increase in ELICOS numbers, and the proportion of student visa holders grew last year. However, a sharp decline in visitor visa holders has had a broad impact.

Our Annual ELICOS Market report undertaken with the support of the Department of Education, Skills and Employment captures the entire sector. I would also like to acknowledge the dedicated efforts of our research partner BONARD, who worked tirelessly again through the research, data analysis, and reporting.

It is only through the Report's associated survey that we gain a true picture of the ELICOS sector and the performance across markets. The true picture allows us to make informed decisions.

Most importantly, obtaining a complete picture of our sector relies on each college's participation. I want to thank every college and its staff who devoted their time to providing their data. While we continue to improve how we collect this data, I know it takes resources to respond. However, I believe it provides us crucial evidence when we need it most.

The Covid-19 pandemic is changing the global environment but having a complete picture of the landscape is valuable English Australia will draw on this data to call for greater support for our sector not only during this pandemic but whenever necessary in the future.

Brett Blacker
CEO
English Australia

We are pleased to continue our collaboration with English Australia on this flagship annual report.

We are ever so grateful to all participating colleges who made the effort to submit their annual data amid the Covid-19 pandemic. We continue supporting the sector in times like these, when the value of data is twice as important as usually.

Our commitment to the ELICOS sector is to gradually advance annual reporting in order to provide pertinent market intelligence that supports all stakeholders – individual colleges, English Australia as well as government bodies – in their international marketing, recruiting activities and policymaking.

This year, we delved into analysing historical trends through a like-for-like sample, assessing data from providers detailing their 2018 and 2019 student intake data.

In addition to providing a complex insight into the sector, our latest global data help assess Australia's position globally and quantify its market share in top source markets, which is one of the key performance indicators.

Samuel Vetrak
CEO
BONARD

Introduction

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

For the third consecutive year, English Australia 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.

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 focuses on 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 when interpreting the data, we have attempted to set these assumptions out clearly. Similarly, 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 as a basis for decision-making. We welcome further discussion and feedback on the analysis in the report.

Methodology

This study draws conclusions from a nationwide industry survey of institutions registered on CRICOS to deliver ELICOS programs. Of the 326 colleges which were active in 2019, 166 participated in this survey, which translates into a response rate of 51 per cent. The English Australia member response rate stood at 63 per cent, while the non-member rate stood at 43 per cent. We collected data between January and April 2020.

As the data was collected and verified amidst the coronavirus lockdown, colleges responsiveness and participation rates were more limited than in previous years. To offset the impact of this, we used historical comparisons featuring colleges reporting for both 2018 and 2019 where appropriate.

We primarily collected data through an online survey. To help colleges participate, respondents could upload exports from their Student Management System (SMS) onto our online platform. We asked colleges to only count student enrolments for the 2019 calendar year and not to include students continuing on from 2018. Colleges were also requested to provide separate figures for individual and group enrolments. We also contacted individual colleges to verify their data and to ensure the accuracy of the report.

To allow for an appropriate level of anonymity, we combined territories with a small number of providers with other states. As a result, the report is divided into five 'states': New South Wales (including the ACT), Queensland (including the Northern Territory), South Australia, Victoria (including Tasmania) and Western Australia.

In the survey, fees for individual students are based on the average weekly fee for each institution in 2019, not fees applicable to any individual country. The fee estimate calculation is based on this average. Fees associated with group bookings were collected for each group separately and therefore do not represent an average of all groups hosted by a particular college.

The economic factor is based on an additional spend of $1.92 for each dollar spent on fees. This amount has remained unchanged since the beginning of the first annual survey. It is an estimate of the extra money that students spend while studying in Australia and is used to determine the total direct contribution that a student makes to the Australian economy.

Rounding accounts for any absolute numbers and percentages that do not exactly add up.

Most of the tables under each region compare 2018 to 2019. You can access any previous data through English Australia.

Weighting
The data in this report represents an estimate of the total ELICOS population in Australia. Raw data was weighted to the Department of Education, Skills and Employment data on student visas and the weighting factor was only applied to individual students. A full explanation of the methodology can be found in the Appendix to this report. Due to weighting, rounding occurs in sub-totals presented in various breakdowns across the report. As a result, the sum of sub-totals may not correspond with the overall figures presented.

Executive Summary

2019 IN REVIEW

Fig 1. Total student numbers in Australia

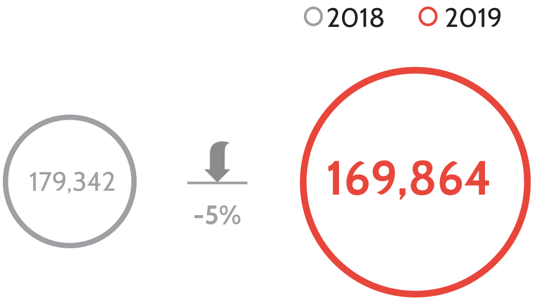


Fig 2. Total student weeks in Australia

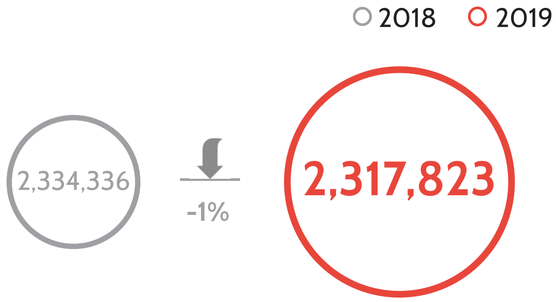


Fig 3. Total student numbers in Australia

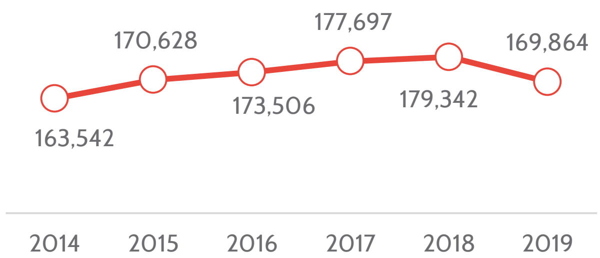
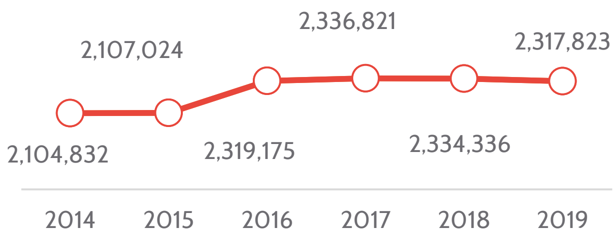


Fig 4. Total student weeks in Australia



MARKET PARAMETERS

Fig 5. Average length of stay

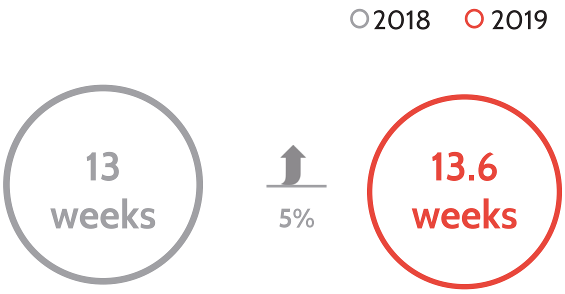


Fig 6. Economic impact (billions)

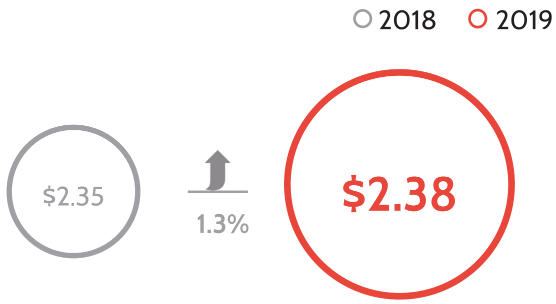
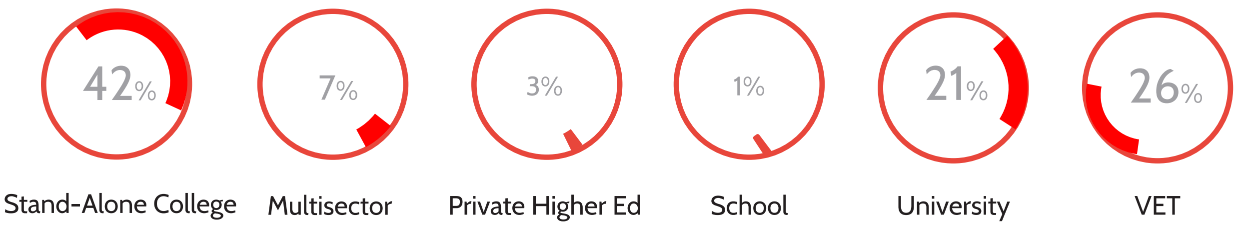


Fig 7. Market share by provider type



STUDENT PROFILE

Fig 8. Student numbers by visa type

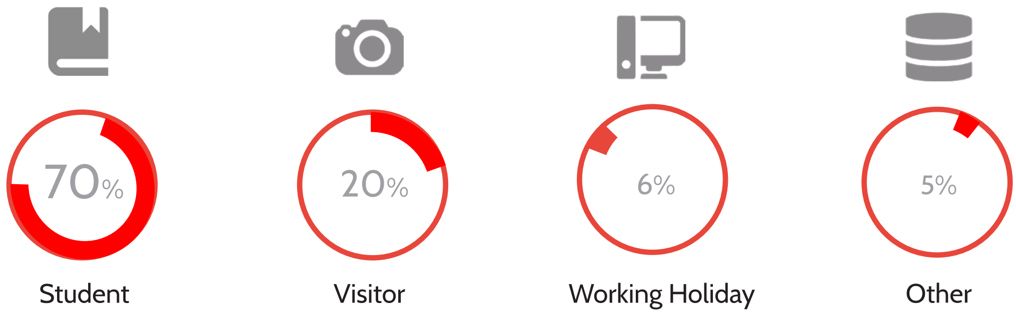


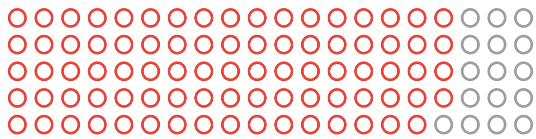
Fig 9. Student numbers by age group

Adults 91%

9% Juniors

Fig 10. Student numbers by booking type

Commissionable 84%



16% Non-commissionable

Fig 11. Student numbers by enrolment type

Individual 93%

7% Group

Fig 12. Student numbers by provider location

City-based 92%

8% Regional

GLOBAL RANK

Fig 13. Australia's global position

Student numbers (2018)

Student weeks (2018)

Average length of stay (2018)

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STATE HIGHLIGHTS

Fig 14. Overview of states

y-o-y % change (student numbers)

Queensland
-8%

43,548 students
586,297 student weeks
Avg length of stay **13.5 weeks**

New South Wales
-7%

64,748 students
878,199 student weeks
Avg length of stay **13.6 weeks**

Western Australia
-3%

12,381 students
134,430 student weeks
Avg length of stay **10.9 weeks**

Victoria
-2%

44,228 students
669,065 student weeks
Avg length of stay **15.1 weeks**

South Australia
+4%

4,959 students
49,833 student weeks
Avg length of stay **10 weeks**

Fig 15. Student numbers by state

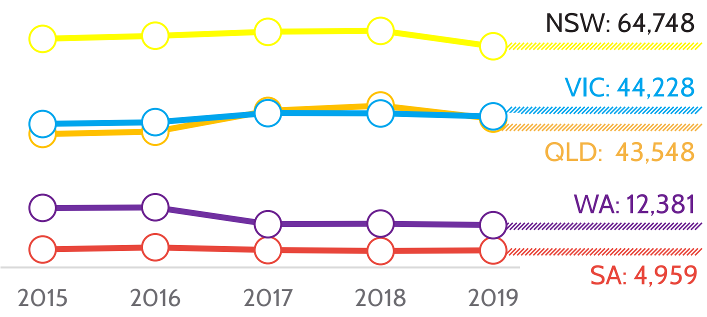


Fig 16. Student numbers by state and visa type (%)

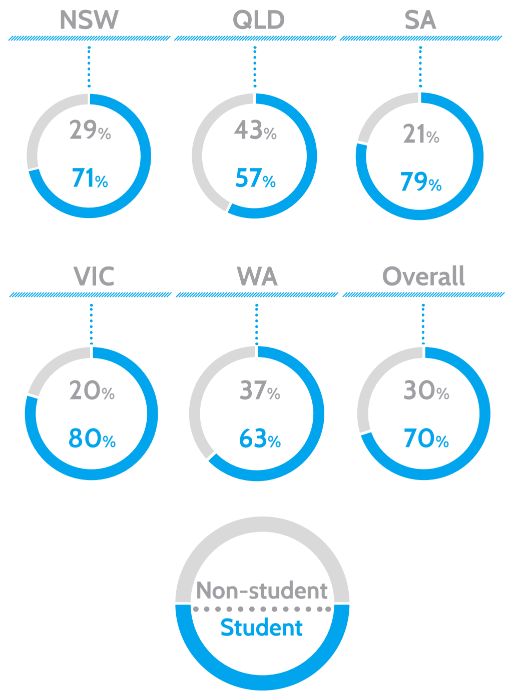
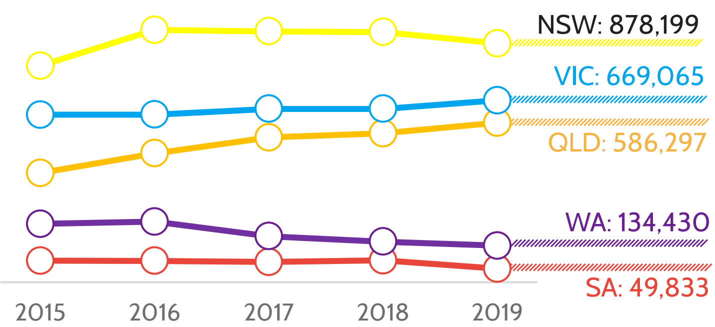


Fig 17. Student weeks by state



REGIONAL HIGHLIGHTS

Fig 18. Overview of source regions

y-o-y % change (student numbers)

Europe
18,551 students
193,290 student weeks
Avg length of stay **10.4 weeks**
+1%

Asia Pacific
110,305 students
1,390,006 student weeks
Avg length of stay **12.6 weeks**
-9%

Americas
35,736 students
643,331 student weeks
Avg length of stay **18 weeks**
+6%

Middle East & Africa
5,273 students
91,196 student weeks
Avg length of stay **17.3 weeks**
-5%

Fig 19. Student numbers by source region

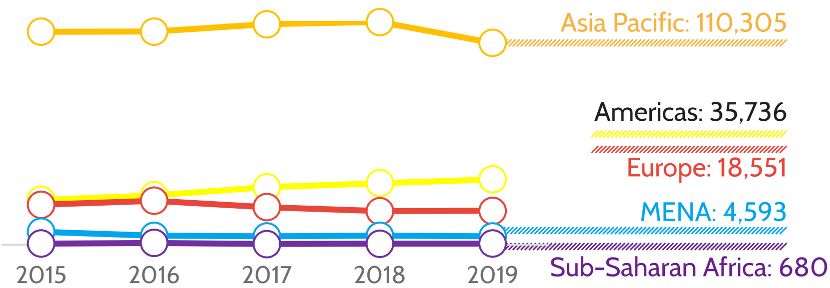


Fig 21. Student weeks by source region

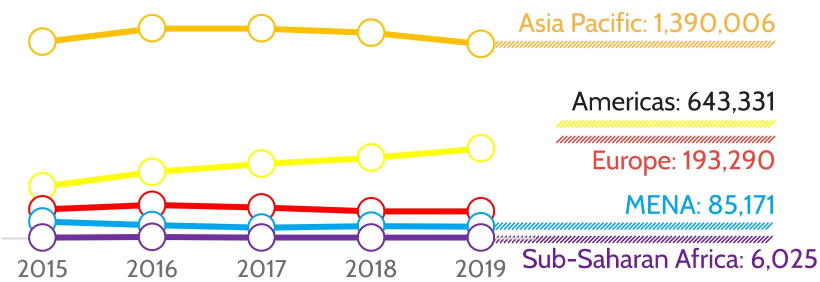
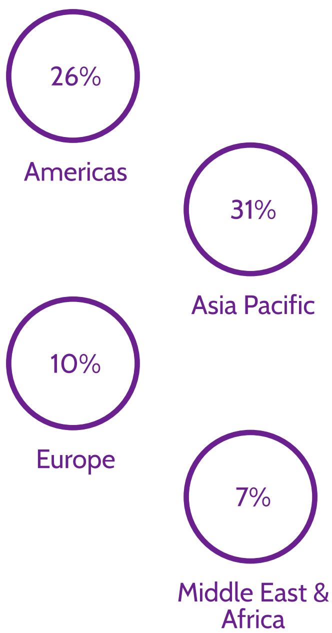
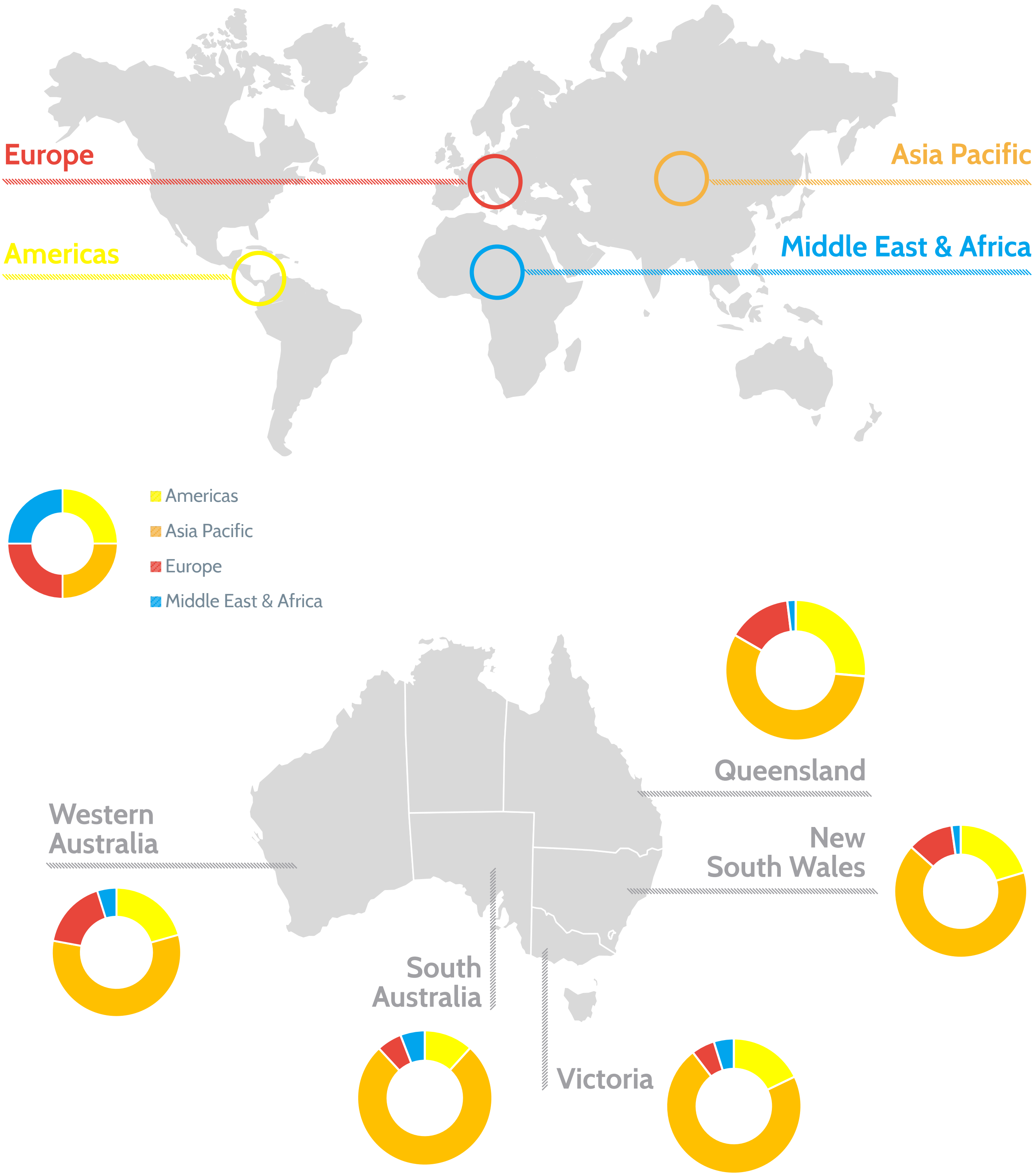


Fig 20. Australia's market share in major regions (student weeks, 2018)



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

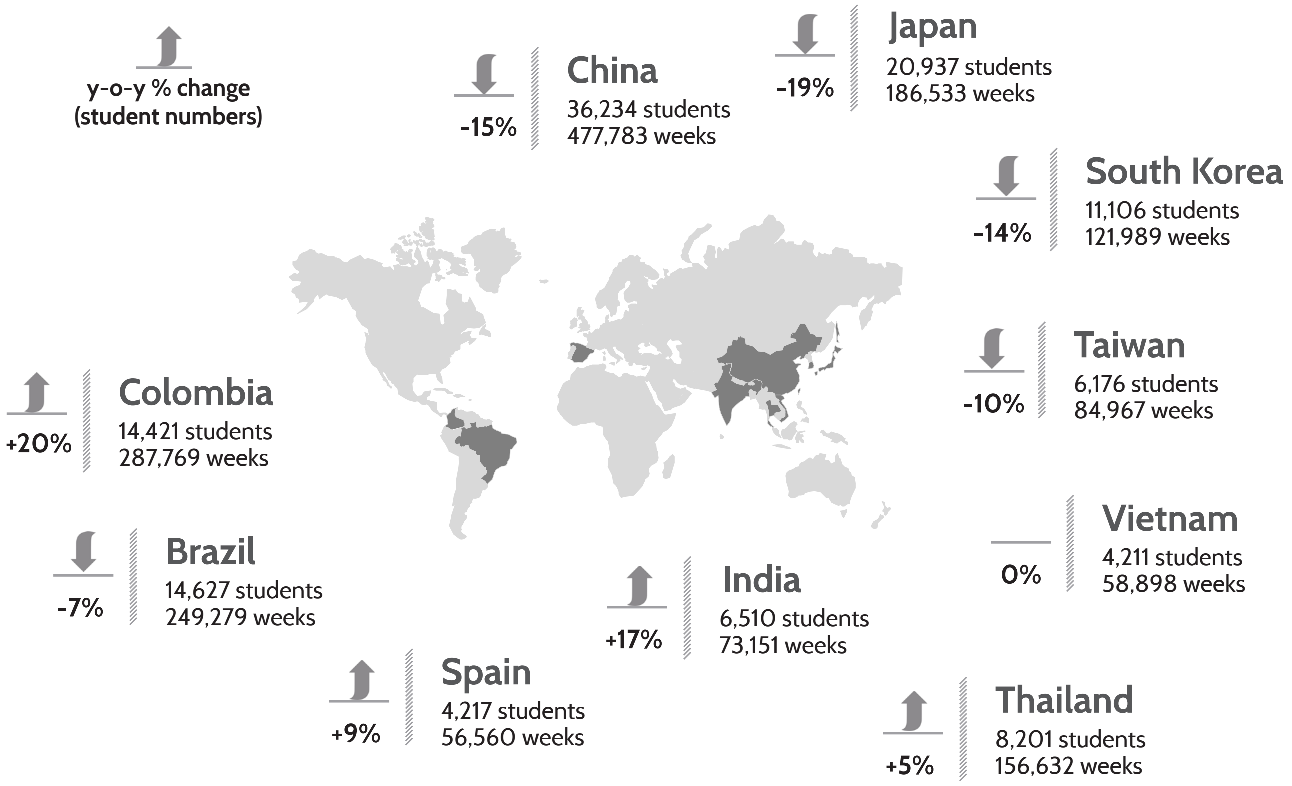


Fig 24. Top five countries with the largest increase (student numbers)

Source country	2018	2019	# Change	% Change
Colombia	11,980	14,421	+2,440	+20%
Nepal	3,076	4,147	+1,071	+35%
India	5,551	6,510	+958	+17%
France	2,894	3,561	+667	+23%
Germany	1,250	1,678	+428	+34%

Fig 25. Share of top 10 source countries

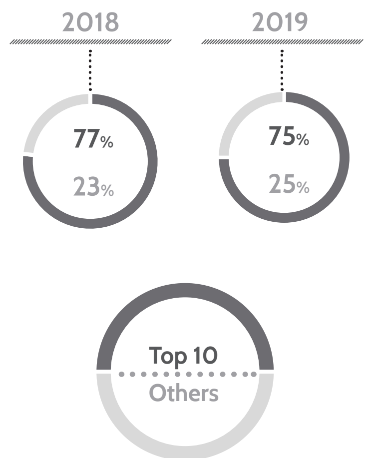


Fig 26. Top five countries with the largest decrease (student numbers)

Source country	2018	2019	# Change	% Change
China	42,596	36,234	-6,362	-15%
Japan	25,711	20,937	-4,774	-19%
South Korea	12,882	11,106	-1,777	-14%
Brazil	15,674	14,627	-1,047	-7%
Malaysia	3,364	2,454	-910	-27%

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