



BONARD

National ELICOS
Market Report 2022
Executive summary

June 2023

englishaustralia.com.au



QUALITY | SUPPORT | ASSURANCE 

A report prepared for English Australia by BONARD
June 2023

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Australian Government
Department of Education

Introduction

This National ELICOS Market Report 2022 provides a comprehensive overview of the performance of ELICOS providers in Australia. It analyses international students studying English language in Australia regardless of visa status.

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

English Australia has commissioned BONARD to administer the survey. BONARD is a global market intelligence and strategic advisory firm that specialises in international education. The company has individual memberships in ESOMAR World Research.

BONARD also supplies global data on English language teaching (ELT) industry and assessment of key performance indicators such as Australia's market share in selected source countries.

Furthermore, this year's edition delivers additional insights on online delivery. It also sheds light on the challenges ELICOS providers faced in 2022 and the challenges they anticipate facing in 2023.

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.

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.

English Australia and BONARD Team

Executive Summary

Fig 1. Total student numbers in Australia

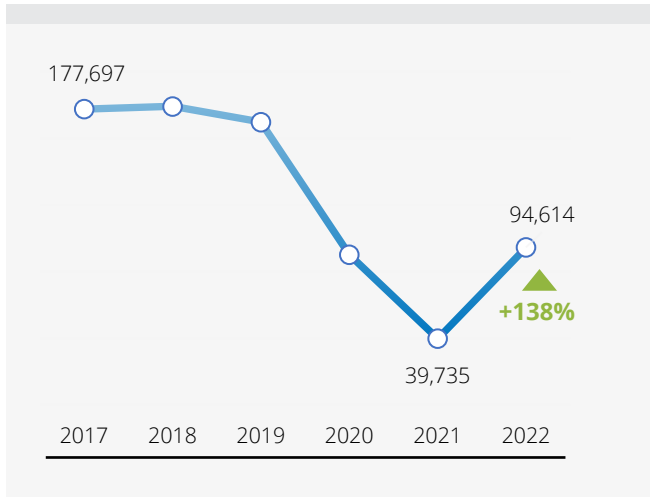


Fig 2. Total student weeks in Australia

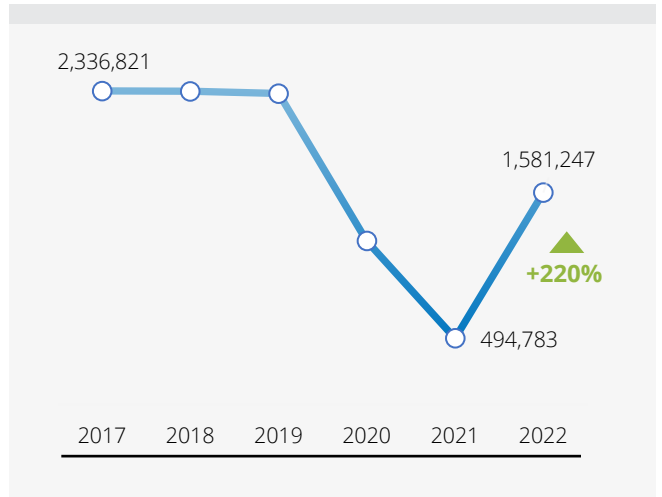


Fig 3. Average length of stay in Australia

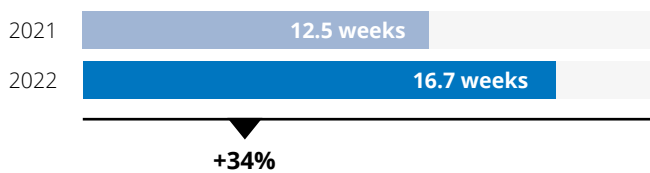


Fig 4. Economic impact



Fig 5. Student numbers by visa type (%)

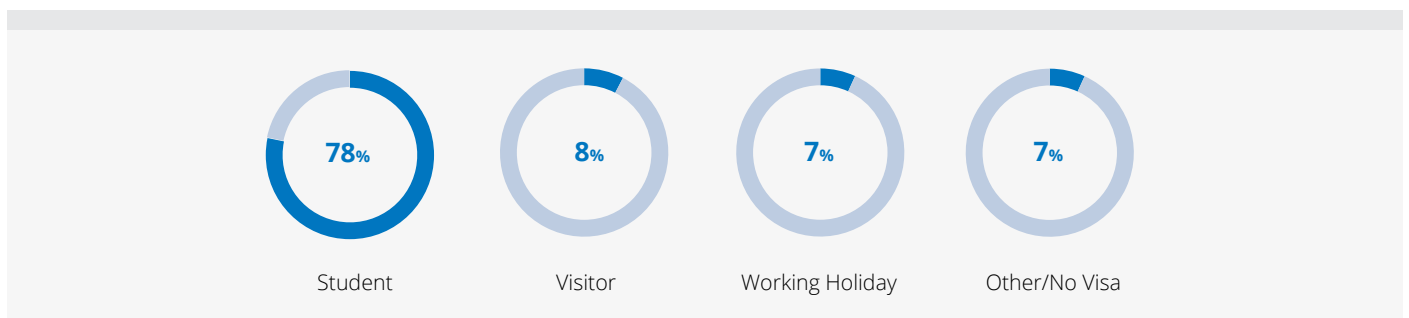


Fig 6. Student numbers by provider type (%)

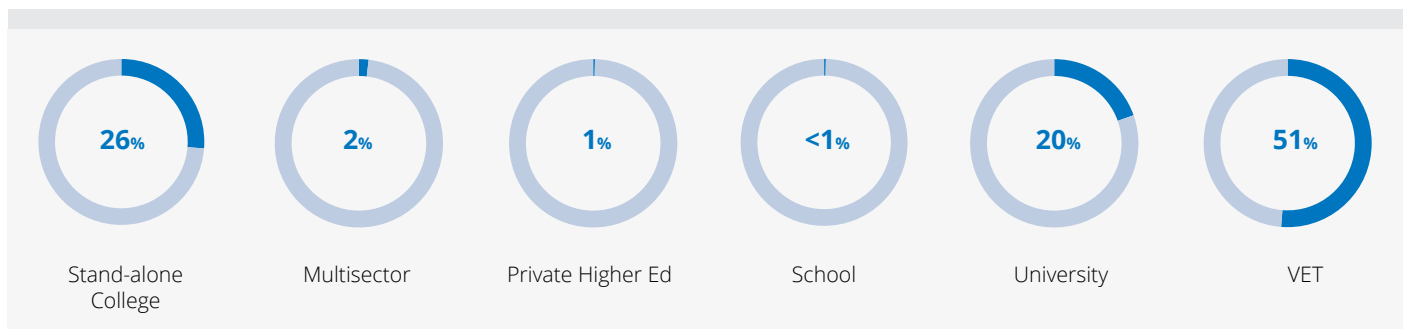


Fig 7. Recovery level by provider type (2022 as a % of 2019, student numbers)

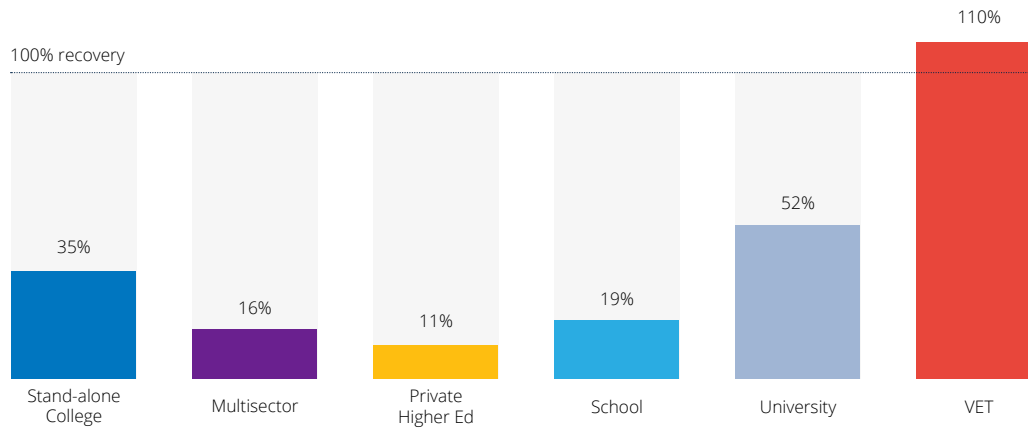


Fig 8. Student numbers by segment (%)

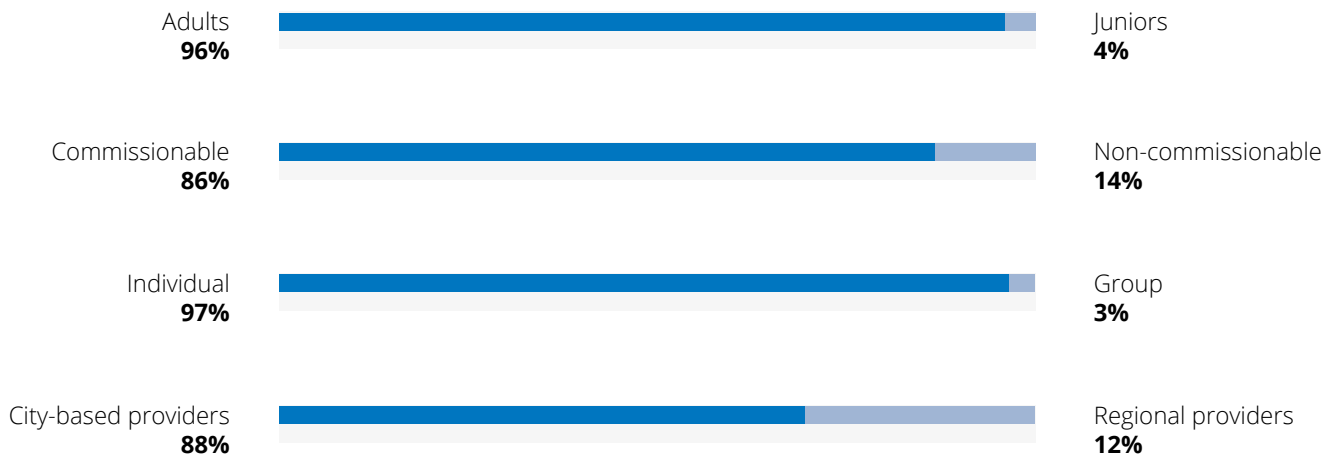


Fig 9. Student numbers and student weeks in online delivery (%)



Fig 10. Overview of states

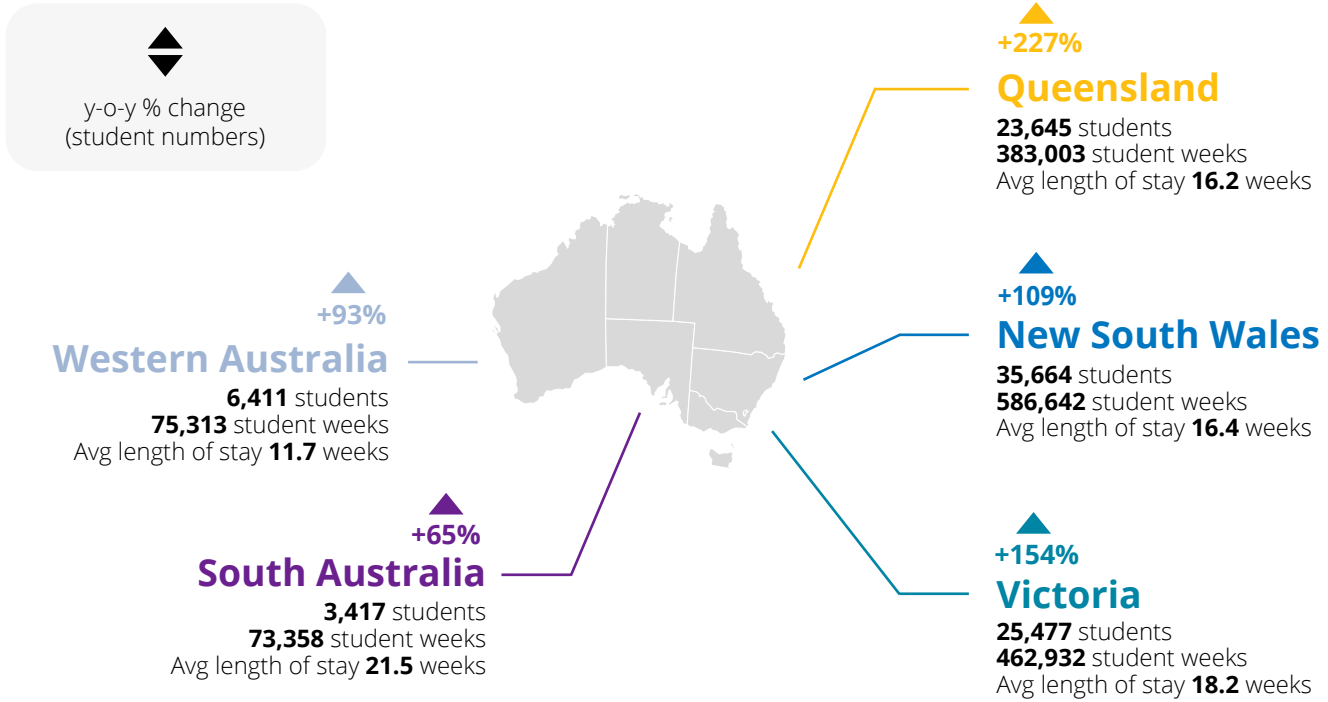


Fig 11. Student numbers by state

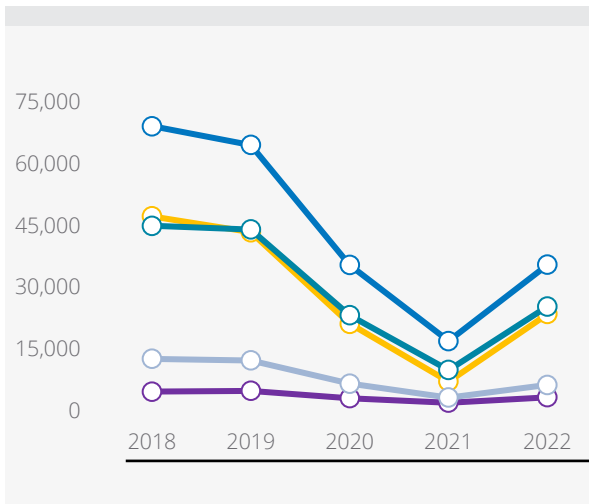


Fig 12. Student weeks by state

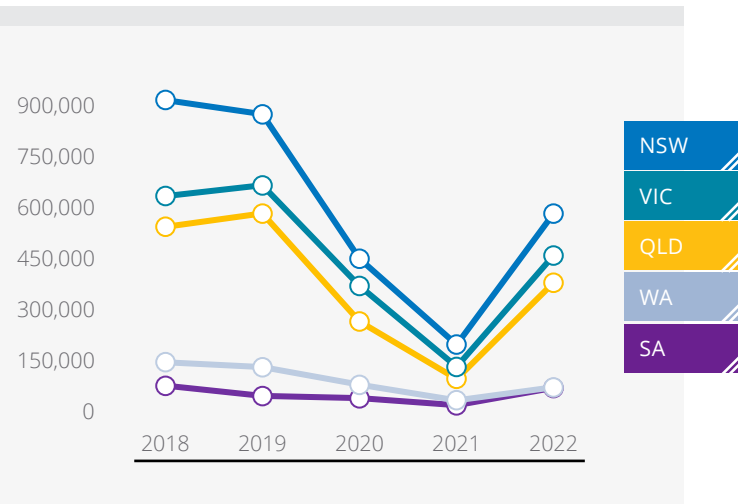


Fig 13. Student numbers by state and visa type (%)

● Student visa ● Non-student visa

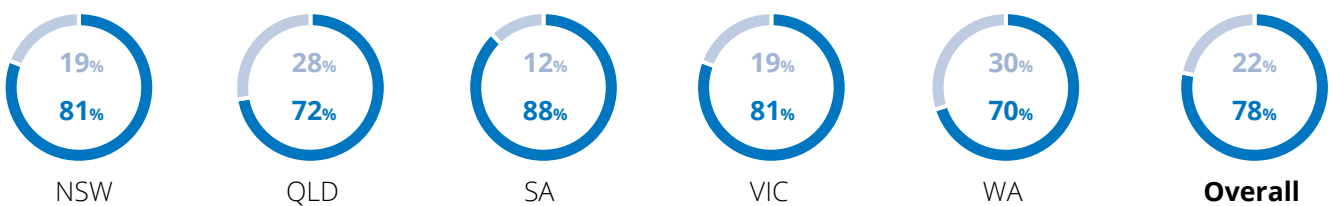


Fig 14. Overview of source regions

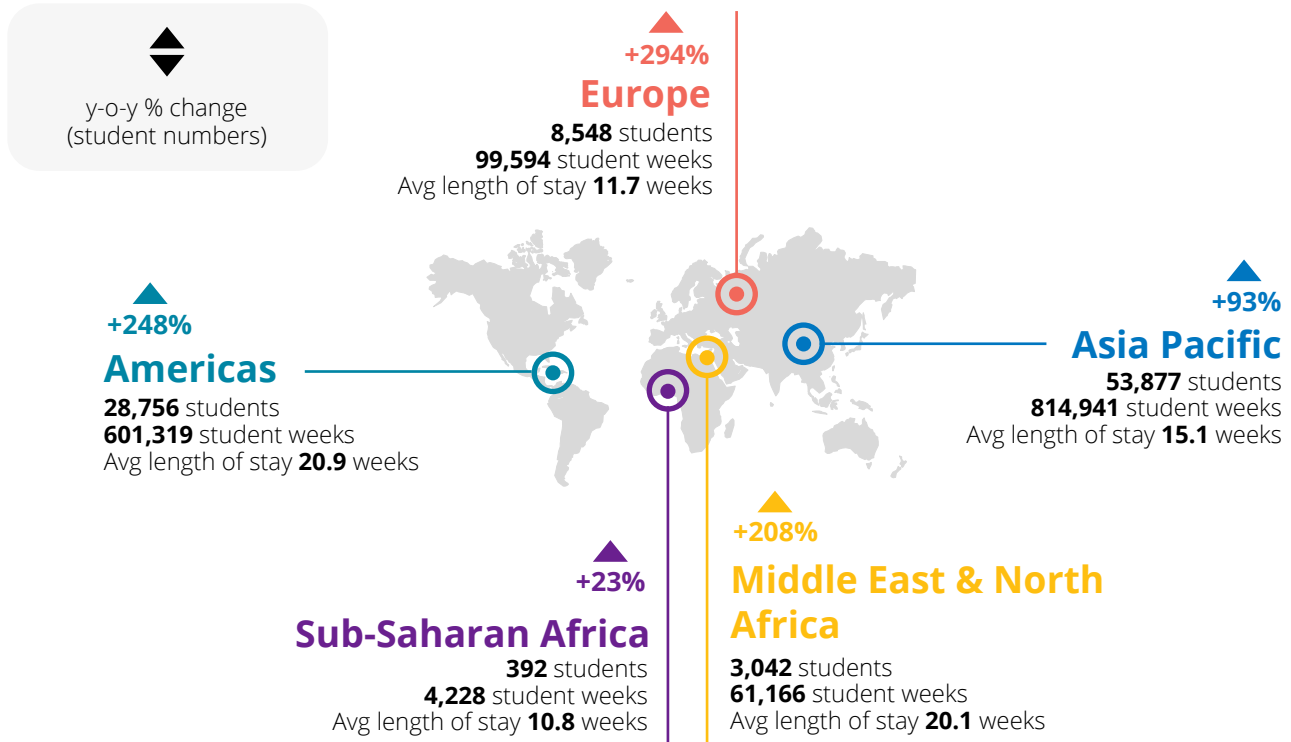


Fig 15. Student numbers by source region

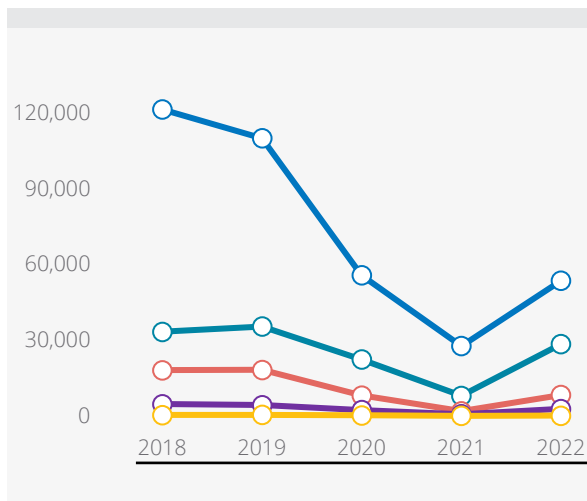


Fig 16. Student weeks by source region

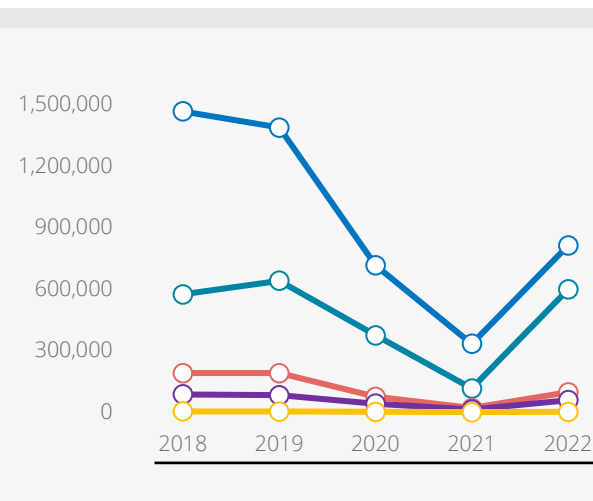


Fig 17. Australia's market share in source regions (student weeks, 2021)



| | |
|--------------------|-----|
| Asia Pacific | 28% |
| Americas | 15% |
| Europe | 4% |
| MENA | 2% |
| Sub-Saharan Africa | 1% |

Fig 18. Overview of student numbers by state, source region, and provider type

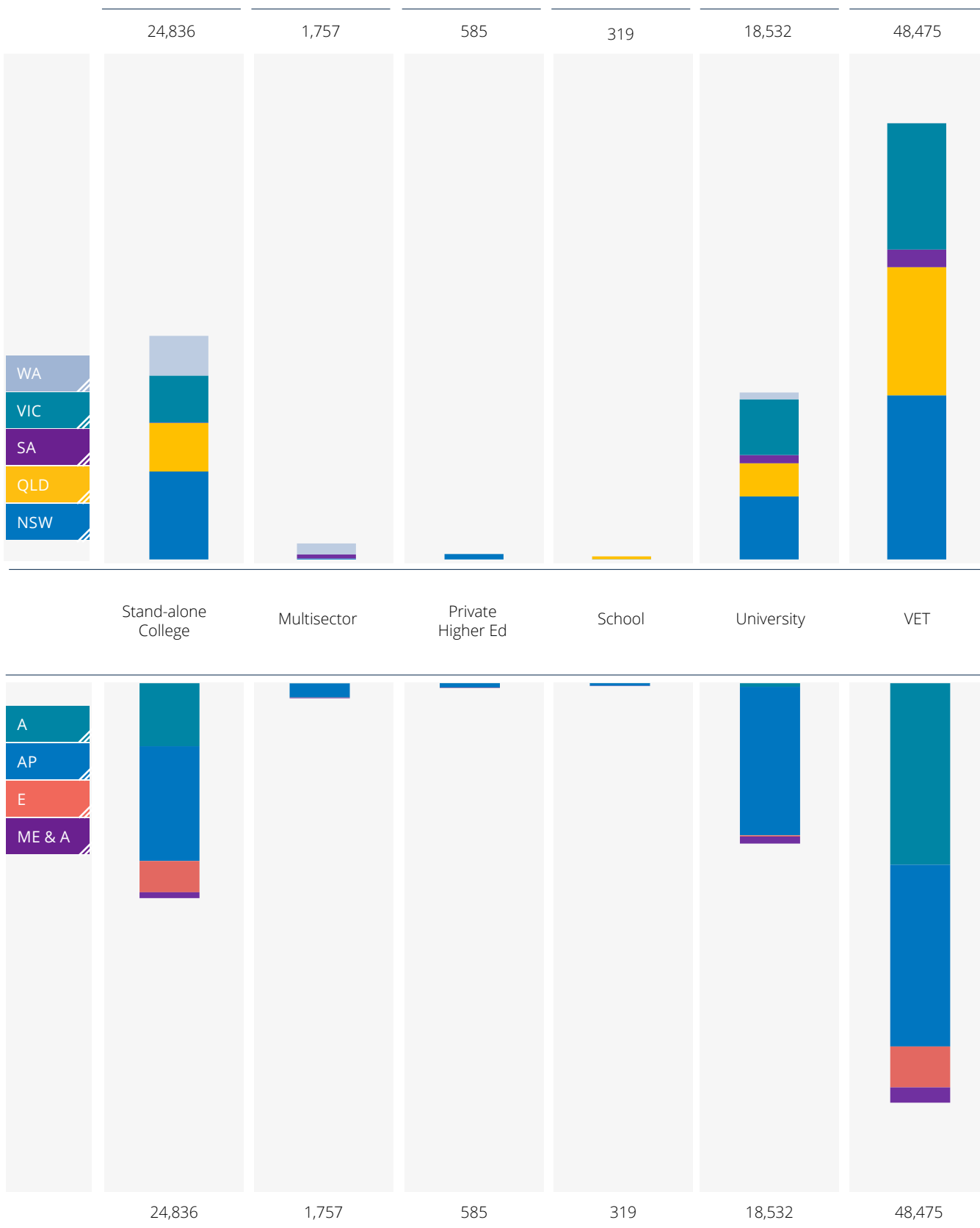


Fig 19. Overview of top ten source countries

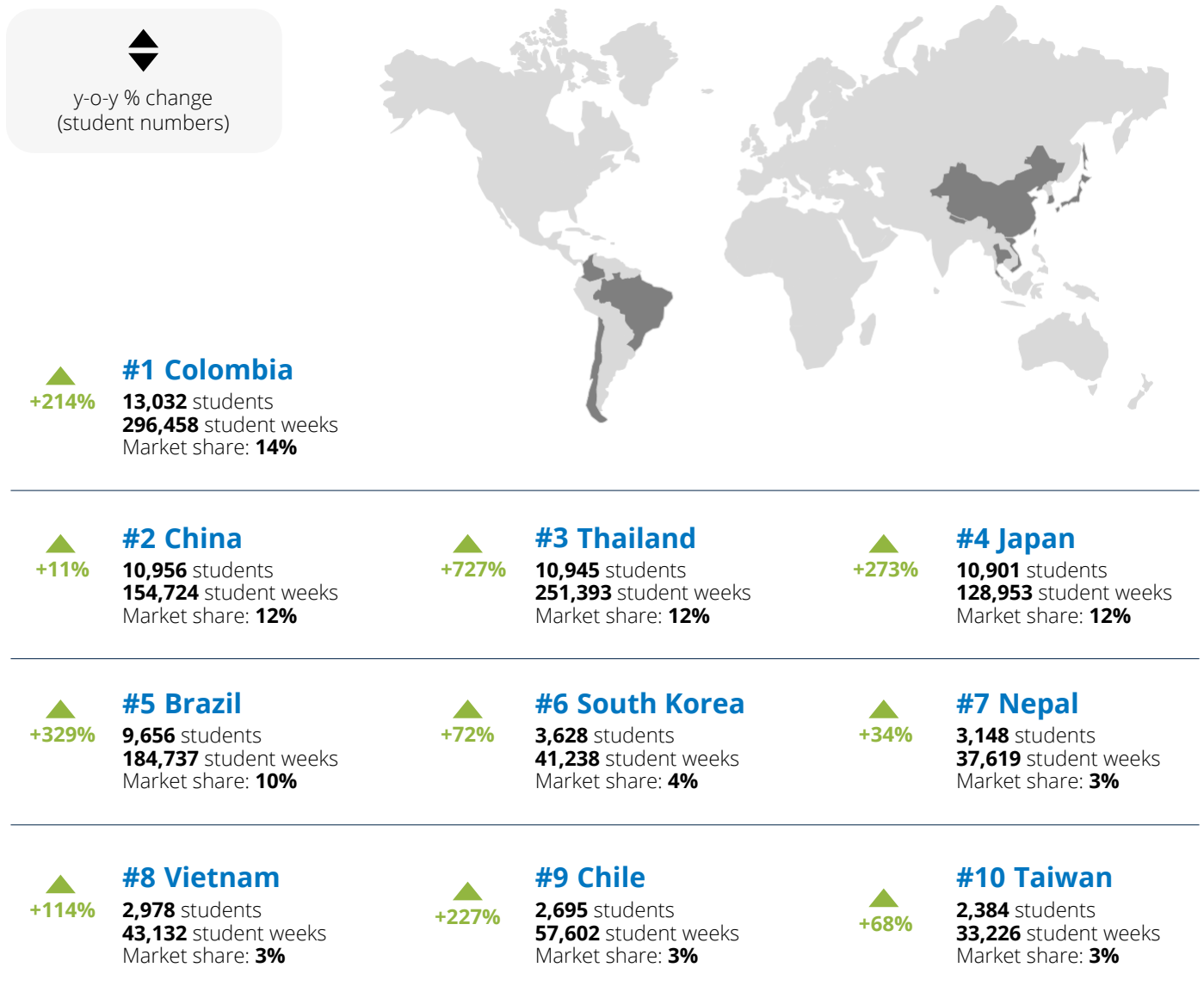


Fig 20. Top growing markets in student numbers

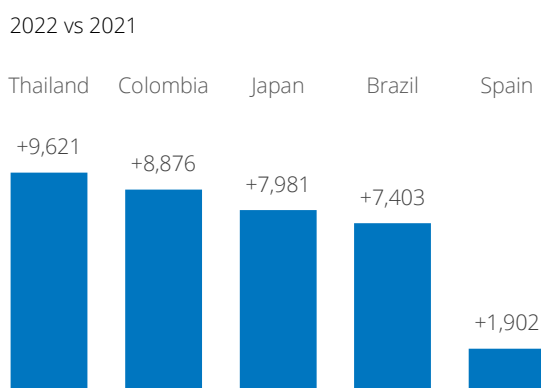
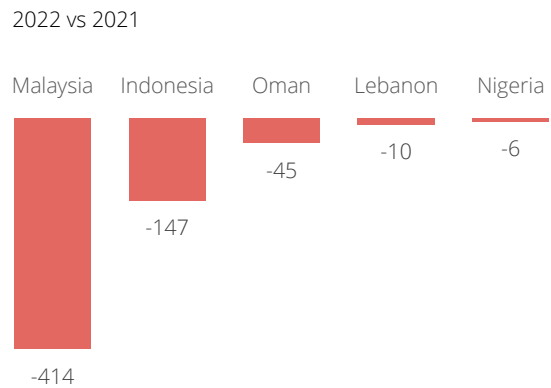


Fig 21. Top declining markets in student numbers





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