

BONARD

National ELICOS Market Report 2024

July 2025



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englishaustralia.com.au

A report prepared for English Australia by BONARD
July 2025

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The English Australia National ELICOS Market Report 2024 is supported by the Australian Government Department of Education.
For more information, please visit the website (<https://www.education.gov.au>).

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Introduction

This National ELICOS Market Report 2024 provides a comprehensive overview of the performance of ELICOS providers in Australia. It analyses international student data 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
- regional locations
- age segment and student booking source

English Australia, supported by the Australian Government Department of Education, 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 the English language teaching (ELT) industry and assessment of key performance indicators such as Australia's market share in selected source countries.

For the 2024 edition of the National ELICOS Market Report, BONARD team have maintained the same analytical framework as last year. This decision was made in recognition of the ongoing challenges faced by ELICOS providers, including consolidation, policy uncertainty, and market volatility.

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

Methodology

This study draws its conclusions from a nationwide industry survey of institutions registered on CRICOS to deliver ELICOS. A total of 437 colleges were contacted during the data collection phase. Approximately 50% of those colleges delivered ELICOS programs to fewer than 30 students in 2024. Of the remaining providers, 173 provided data to this survey. This is a strong participation rate with approximately 70% of all students included in the survey. Data collection took place in February and March 2025.

To facilitate participation in the online survey, respondents were invited to upload exports from their student management system (SMS) onto our online platform. As always, only student enrolments that commenced in 2024 calendar year were counted. The data does not include students continuing on from 2023. Colleges were also asked to provide separate figures for individual and group enrolments. We also contacted individual colleges to verify their data and ensure the accuracy of the report.

As with past reports, to allow for an appropriate level of anonymity, we have combined data from states and territories with smaller student numbers with data from larger 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 were based on the average weekly fee for each institution in 2024, not fees applicable to any individual country. The fee estimate is aggregated from 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 first annual survey in 2001. 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. This additional spend was not applied to the off-shore students identified by colleges. Rounding accounts for any absolute numbers and percentages that do not exactly add up.

Weighting

The data in this report represents an estimate of the total English language learning population in Australia. Raw data was weighted against the Department of Education data on ELICOS commencements in 2024 and the weighting factor was applied to individual students only (not group enrolments). A full explanation of the methodology can be found in the Appendix to this report. Due to weighting, rounding occurs in the sub-totals in various elements in this report. As a result, the sum of sub-totals may not precisely match total.

Executive Summary

Explanations and analysis of each of the figures below are included in the full report following.

Fig 1. Total student numbers in Australia

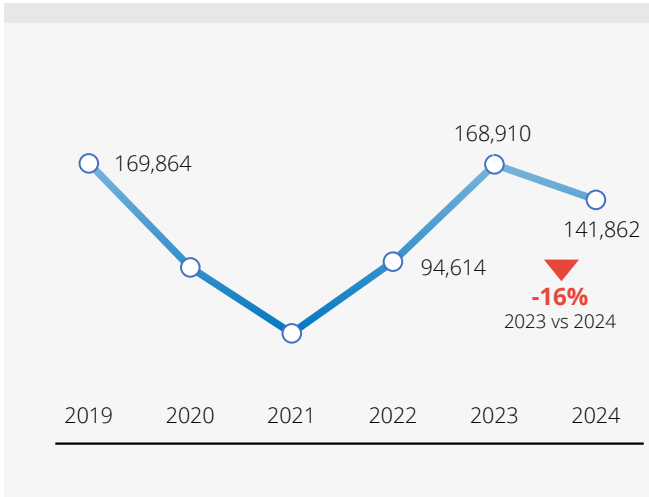


Fig 2. Total student weeks in Australia

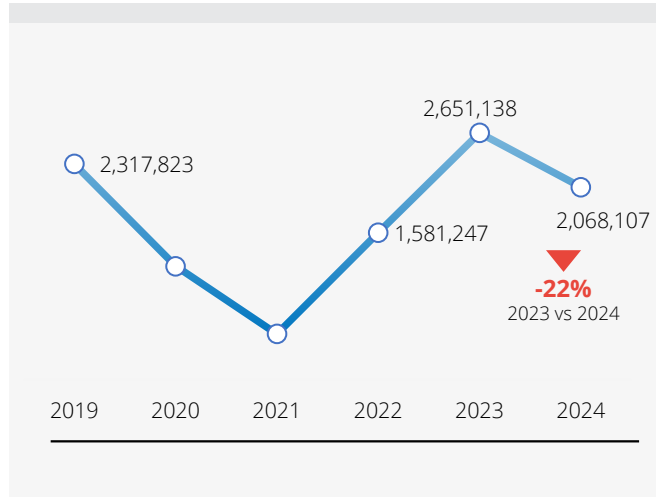


Fig 3. Average length of stay in Australia

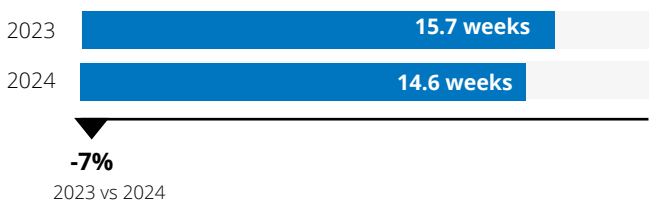


Fig 4. Economic impact

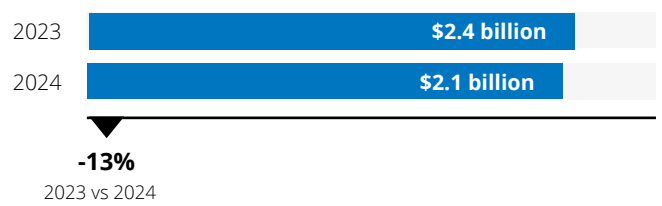


Fig 5. Proportion of students by visa type (%)

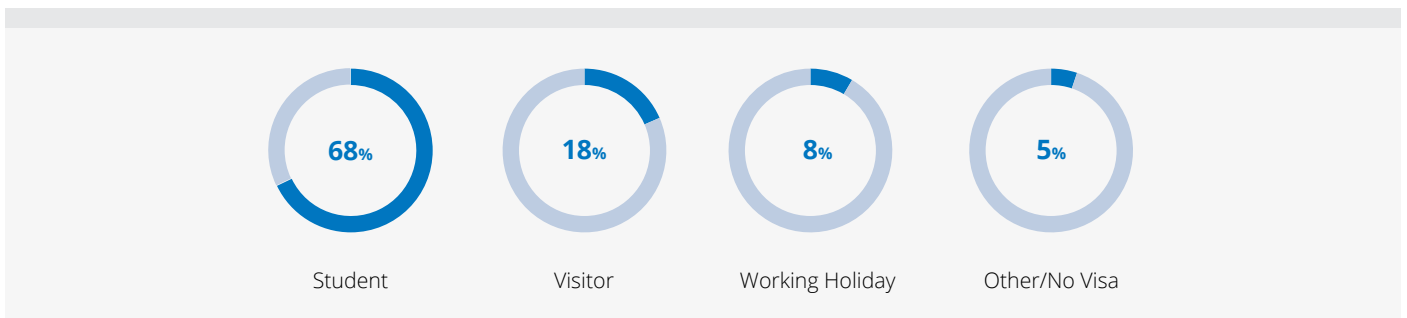
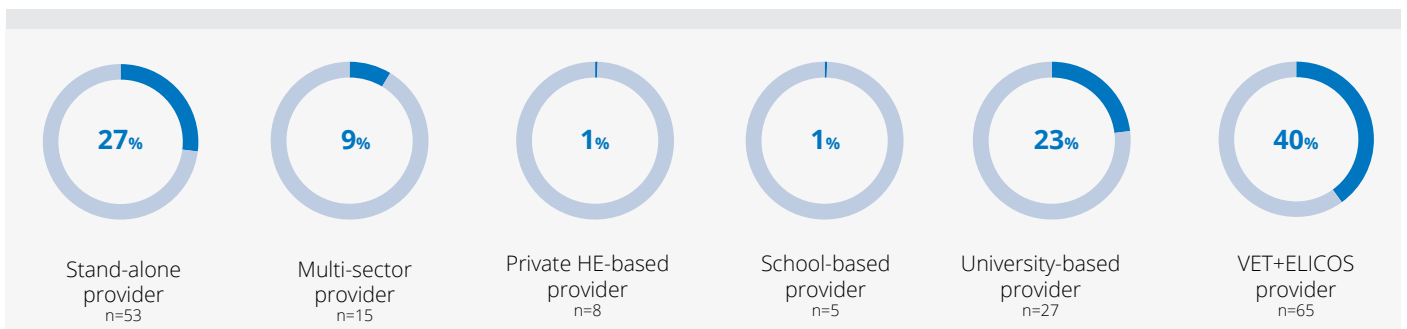


Fig 6. Share of total students by ELICOS provider type (%)



Note: Rounding accounts for any percentages not exactly adding up to 100%.

Fig 7. Pre-pandemic level by ELICOS provider type (2024 versus 2019, student numbers)

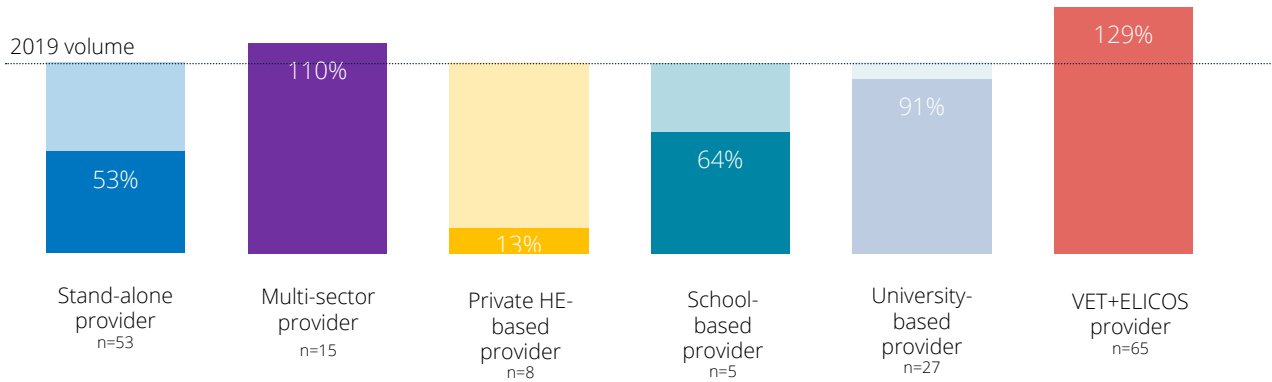


Fig 8. Student numbers by segment (%)



Fig 9. Top 5 challenges ELICOS providers faced in 2024

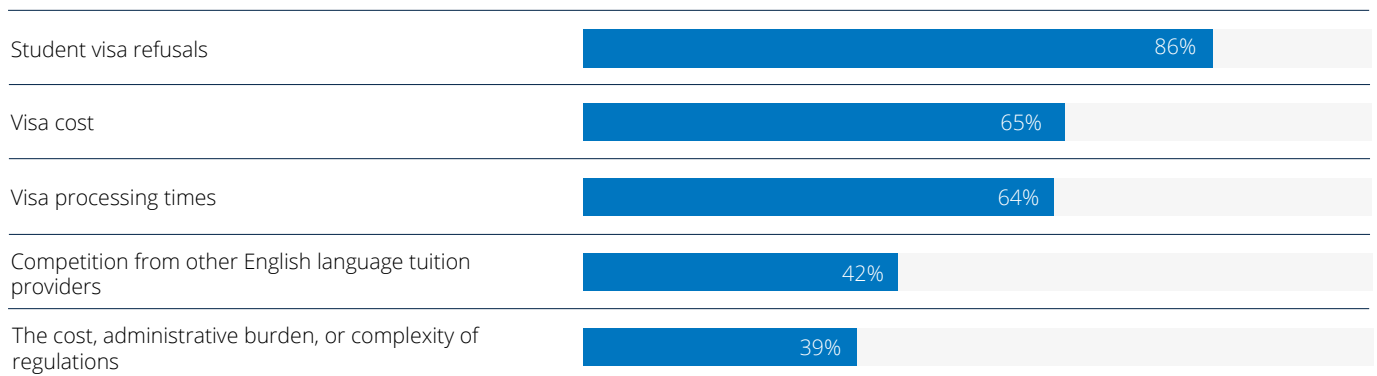


Fig 10. Overview of states

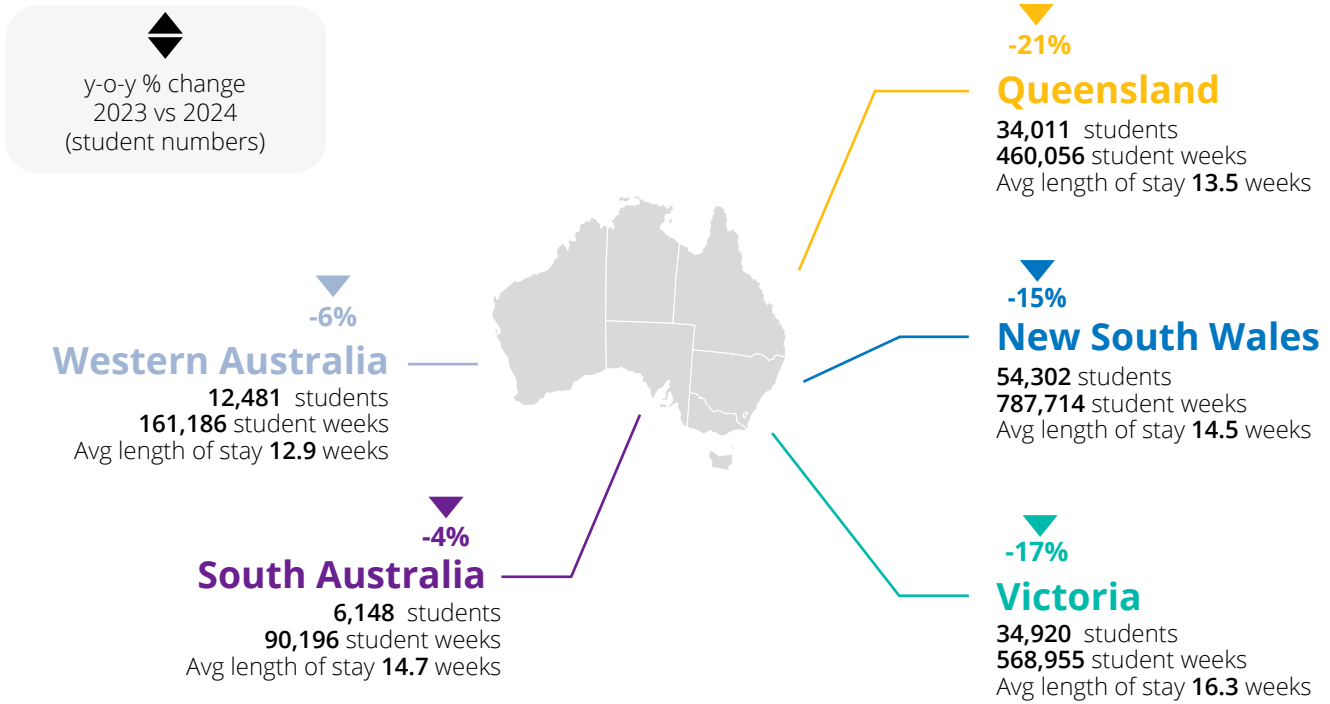


Fig 11. Student numbers by state

Fig 12. Student weeks by state

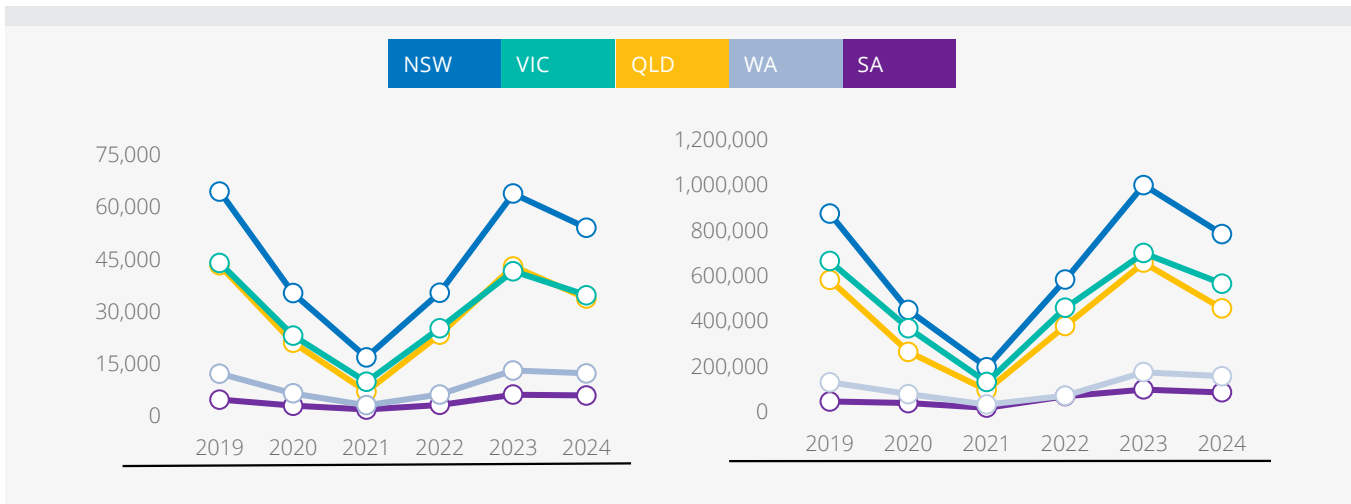


Fig 13. Student numbers by state and visa type (%)

● Student visa ● Non-student visa

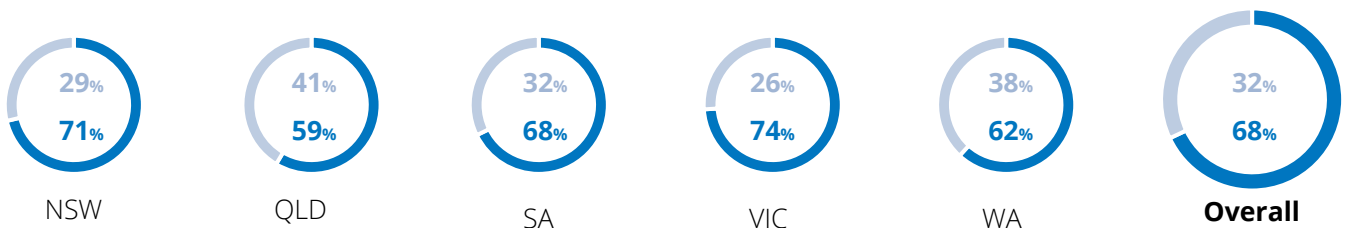


Fig 14. Overview of source regions

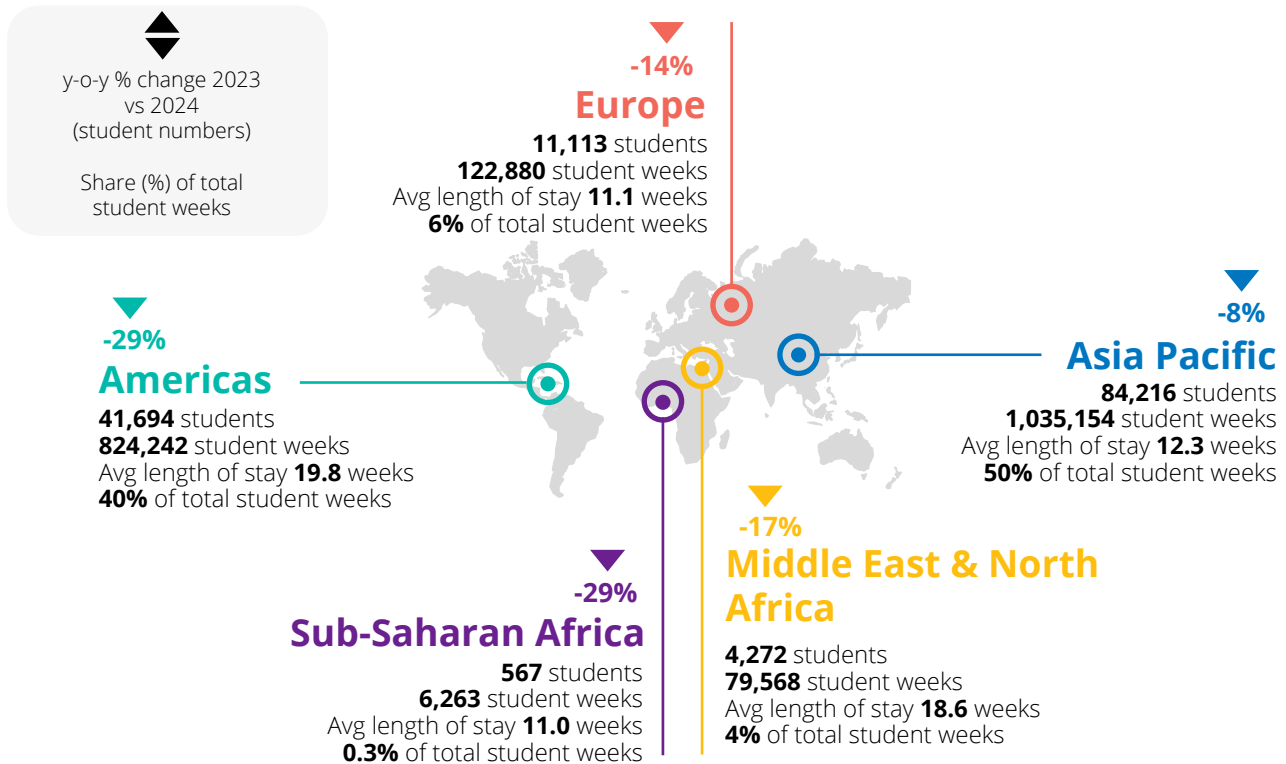


Fig 15. Student numbers by source region

Fig 16. Student weeks by source region

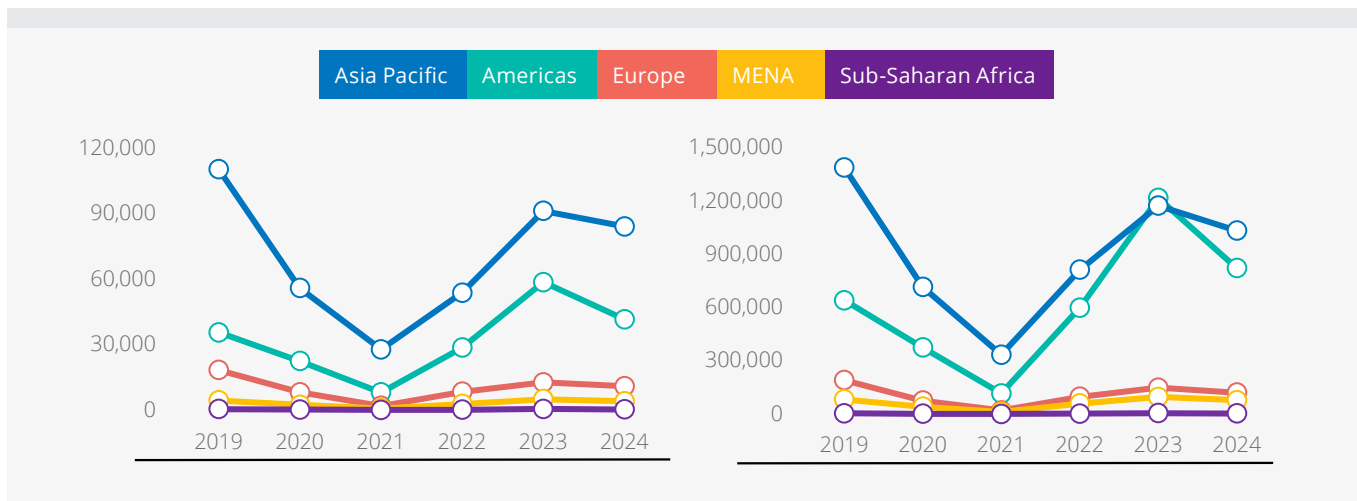
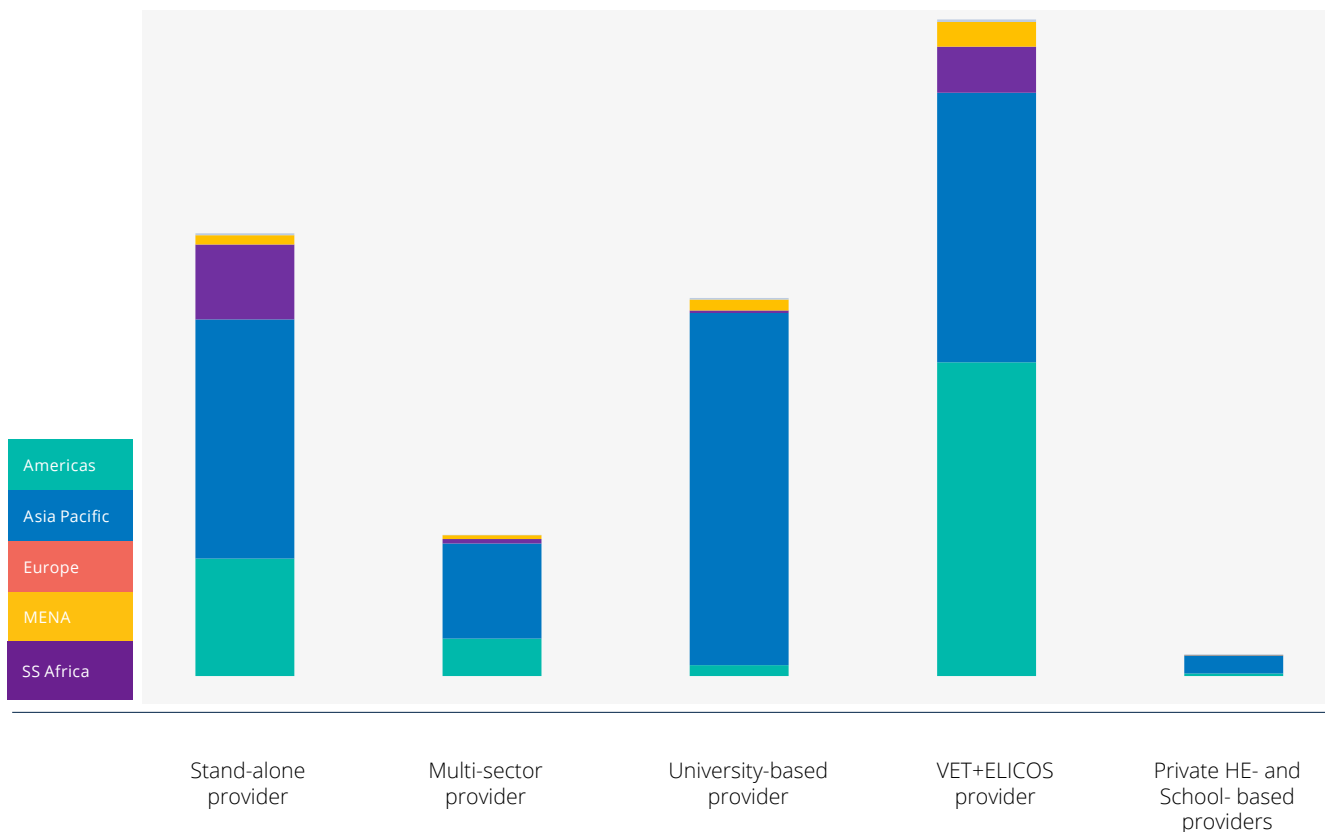


Fig 17. Australia's global market share (student weeks)



Fig 18. Overview of student numbers by source region (including top source countries, and ELICOS provider type)

Student numbers



| Rank | Stand-alone provider | Multi-sector provider | University-based provider | VET+ELICOS provider |
|------|----------------------|-----------------------|---------------------------|---------------------|
| 1. | Japan | Japan | China | Colombia |
| 2. | Colombia | Colombia | Japan | Brazil |
| 3. | Brazil | South Korea | Vietnam | Japan |
| 4. | Taiwan | Mongolia | Taiwan | South Korea |
| 5. | China | Vietnam | South Korea | Thailand |
| 6. | France | Brazil | Colombia | Nepal |
| 7. | South Korea | China | Saudi Arabia | Taiwan |
| 8. | Spain | Taiwan | Hong Kong | Chile |
| 9. | Switzerland | Thailand | Mongolia | Türkiye |
| 10. | Thailand | India | Thailand | Vietnam |

Fig 19. Overview of top ten source countries

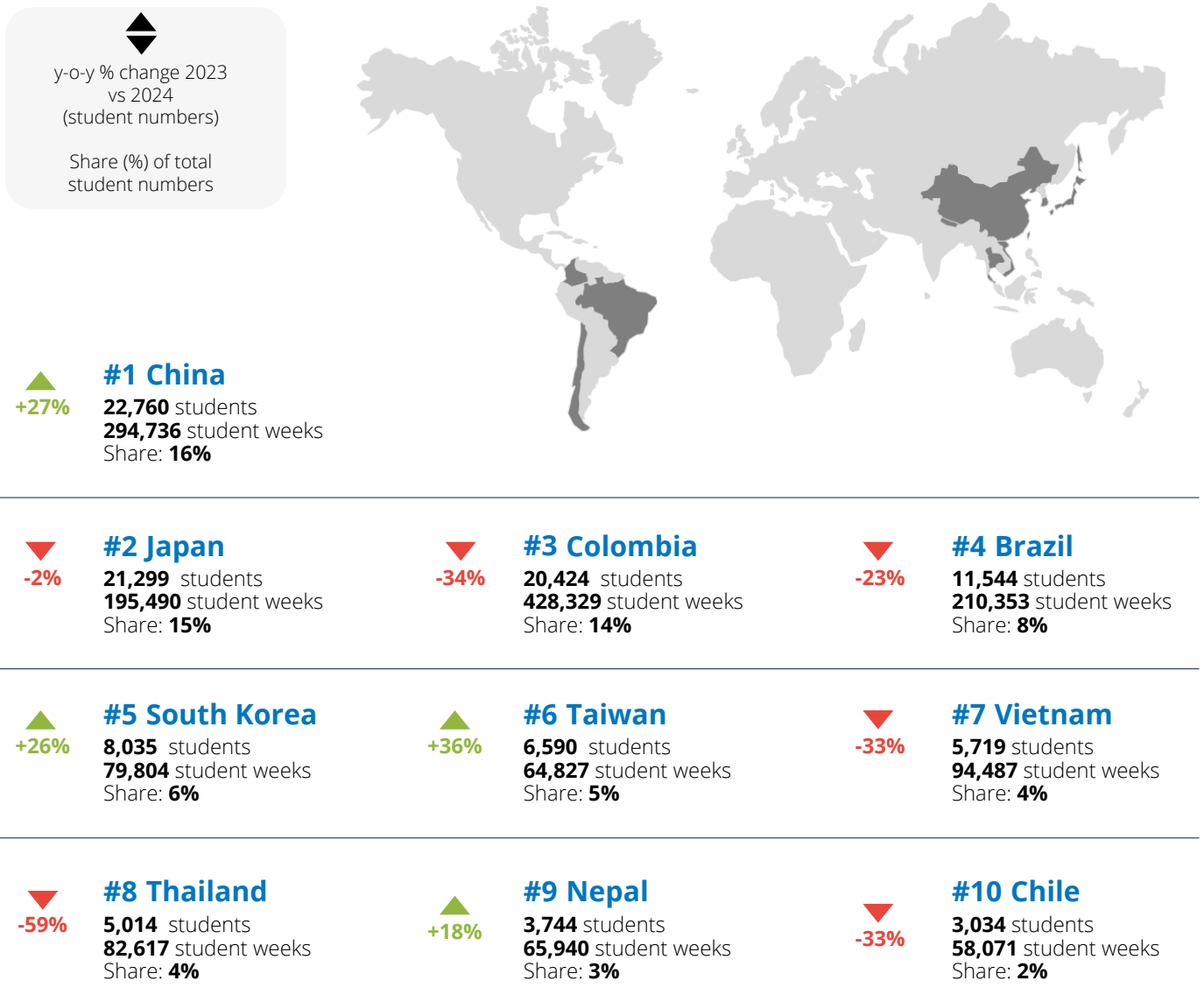


Fig 20. Top growing markets in student numbers

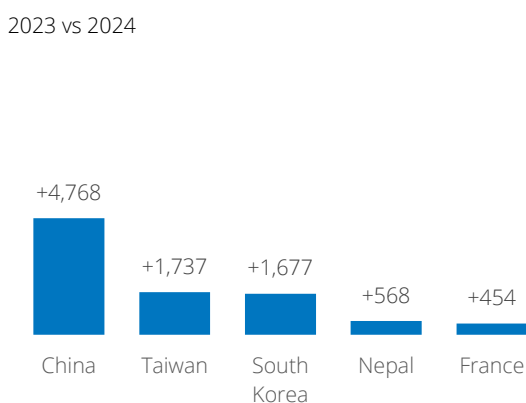
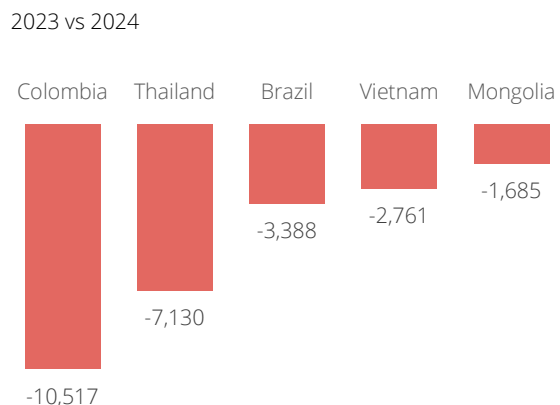


Fig 21. Top declining markets in student numbers





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