



Australian Government

Australian Trade and Investment Commission

Insights & activities in major ELICOS markets

English Australia Conference

1 September 2023

Austrade

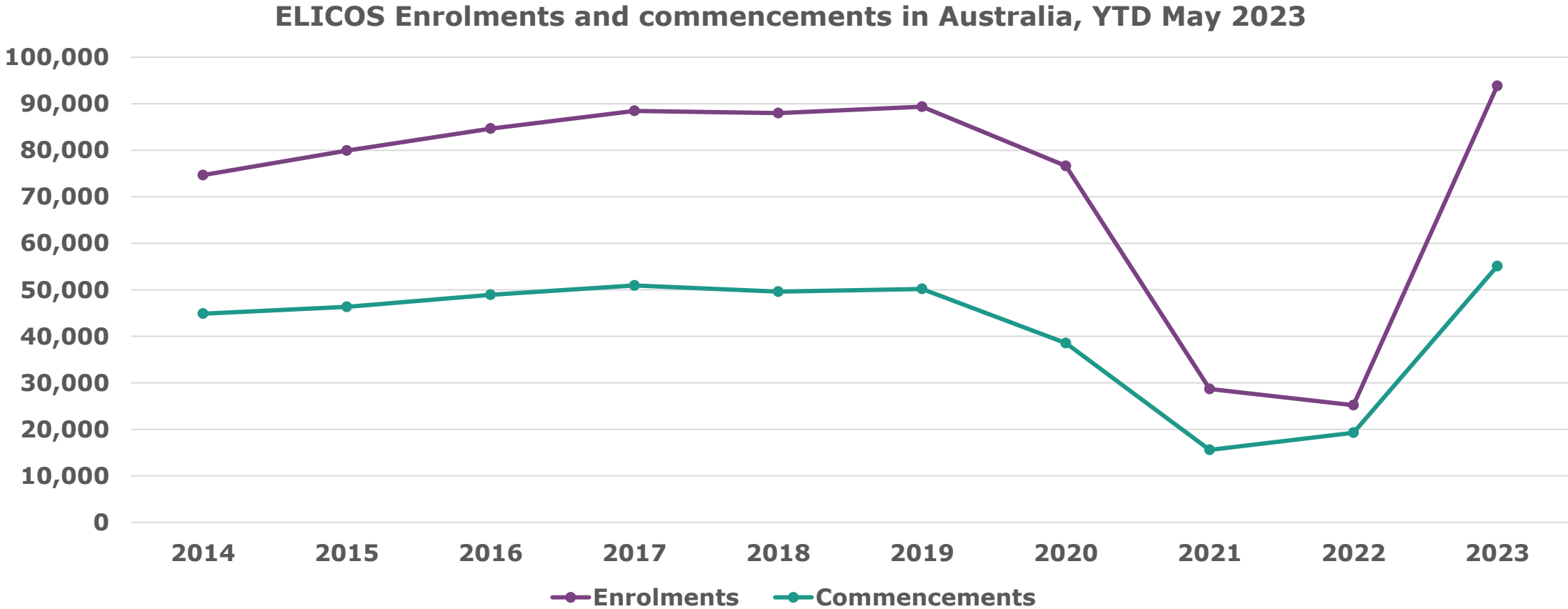
- With almost 70 offices in 47 countries around the world and 1100 employees, Austrade has a large global network of trade and investment experts.
- We connect Australian businesses to the world, and the world to Australian businesses.



Student data

ELICOS enrolments and commencement trends

Both commencements & enrolments have exceeded YTD May 2019 levels

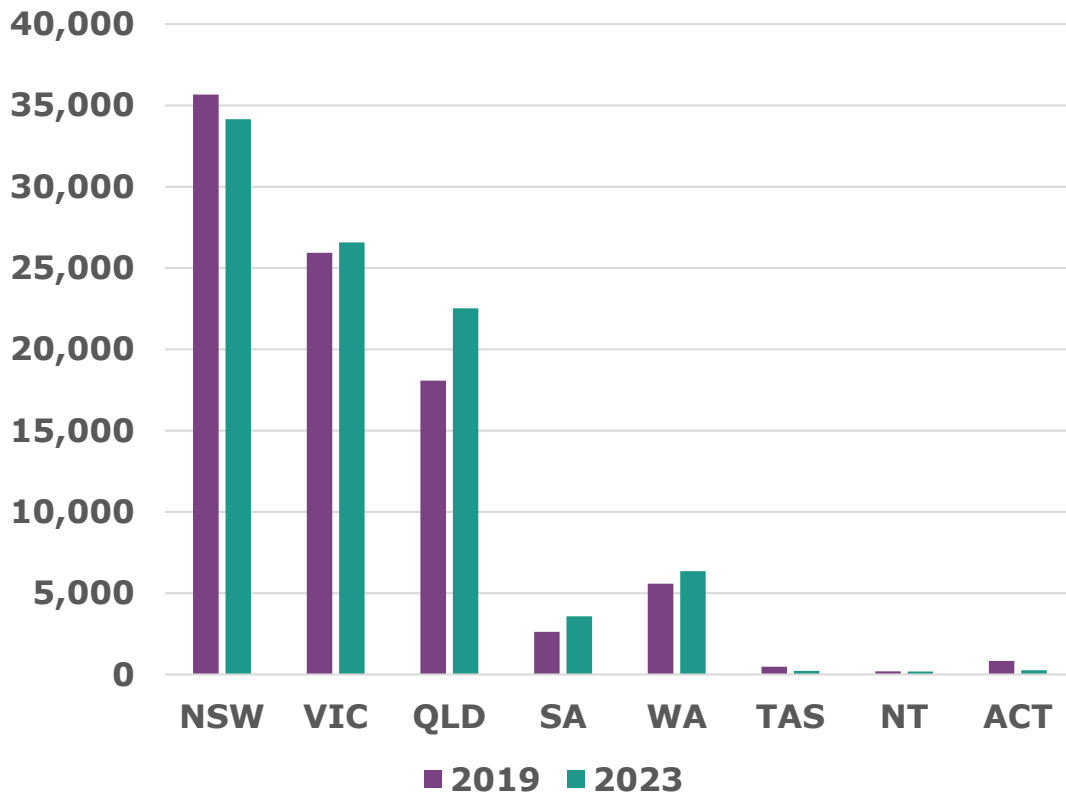


Source: Department of Education, PRISMS

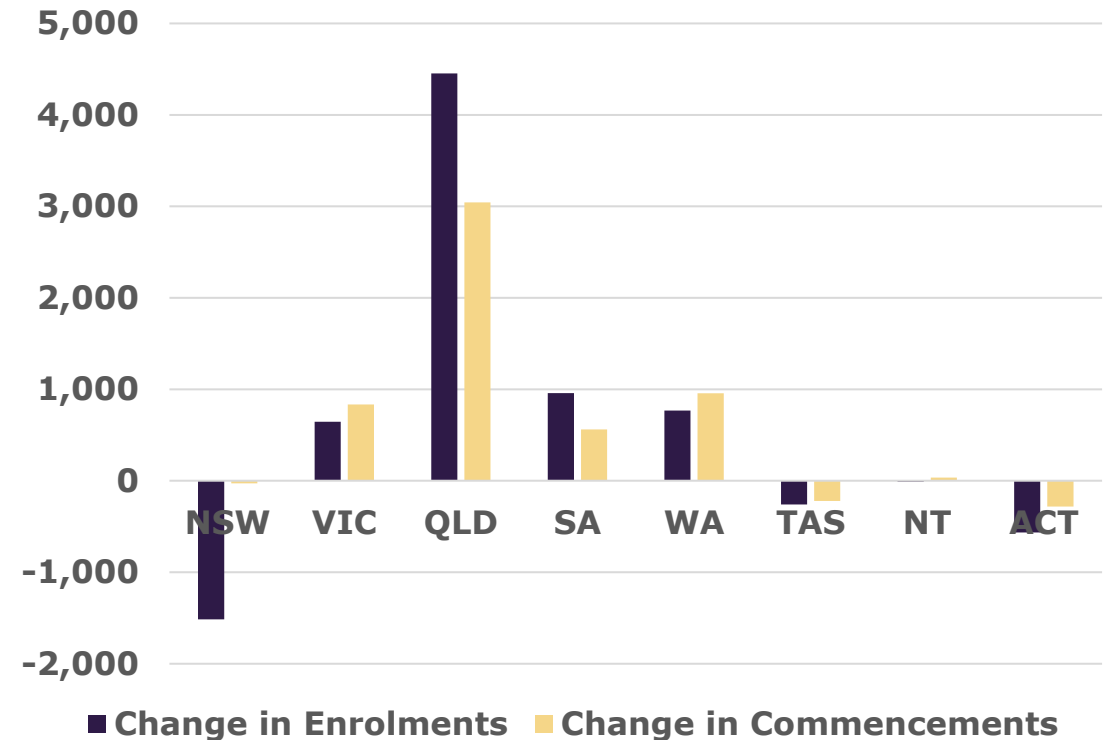
ELICOS enrolments and commencements by state

Enrolments and commencements in NSW, TAS, ACT and NT are yet to recover to pre-pandemic levels (YTD May 2019).

ELICOS enrolments by state, YTD May



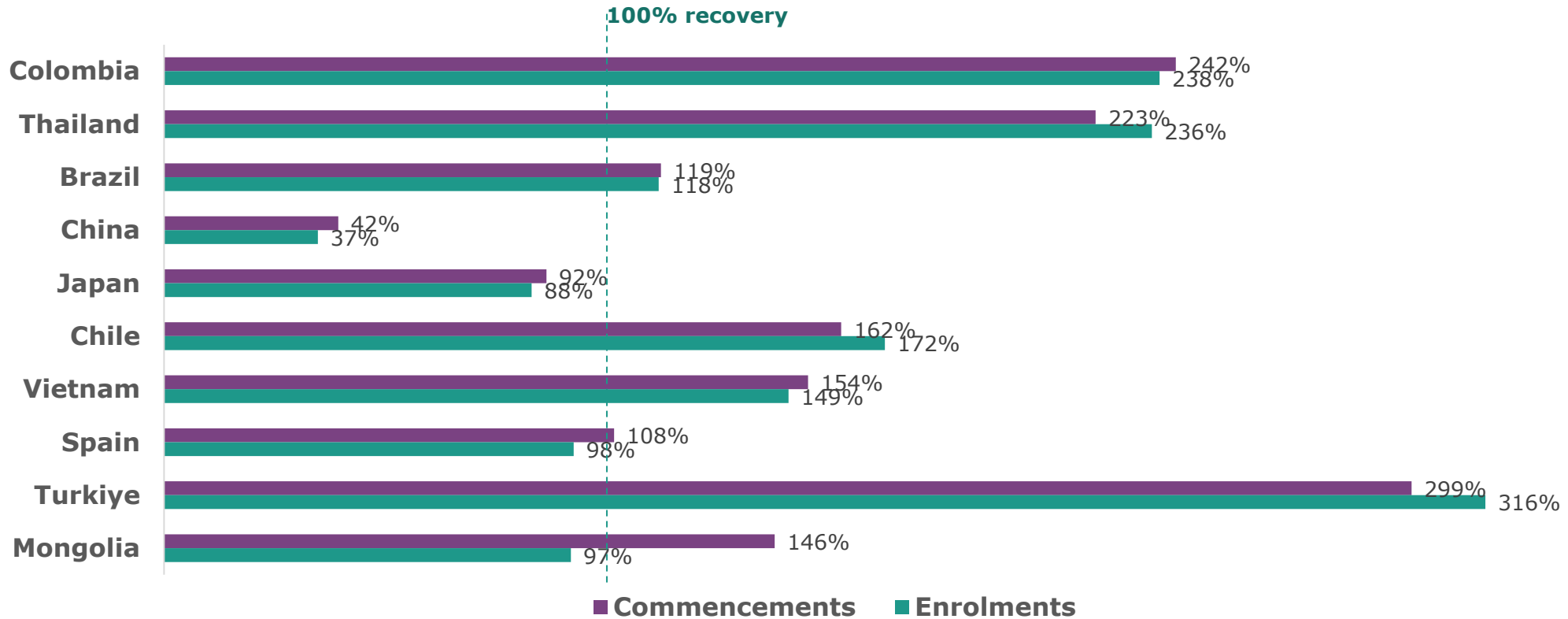
Changes in ELICOS enrolments & commencements by state, YTD May 2023 vs YTD May 2019



ELICOS recovery level by top 10 source markets

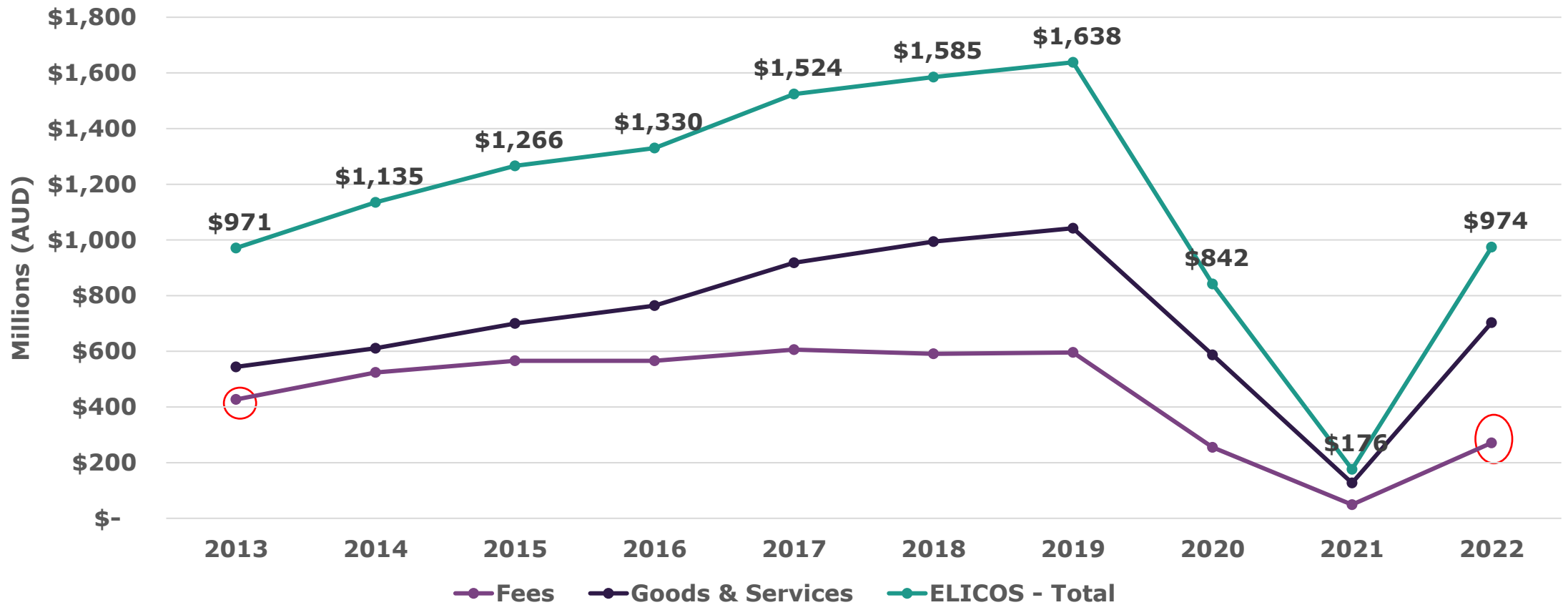
Most top ten source markets for ELICOS now exceed 2019 enrolments and commencements, except for China and Japan. Commencements are at 42% of pre-pandemic volumes for China and 92% for Japan. South Korea and Taiwan have dropped out of the top 10 since 2019.

ELICOS sector recovery level by Top 10 source market- YTD May 2023



Economic contribution of the ELICOS sector

ELICOS sector exports were valued at \$974 million in 2022, up 453 per cent on 2021 (\$176 million), but down 41 per cent from the peak of \$1.6 billion in 2019 (pre-pandemic).

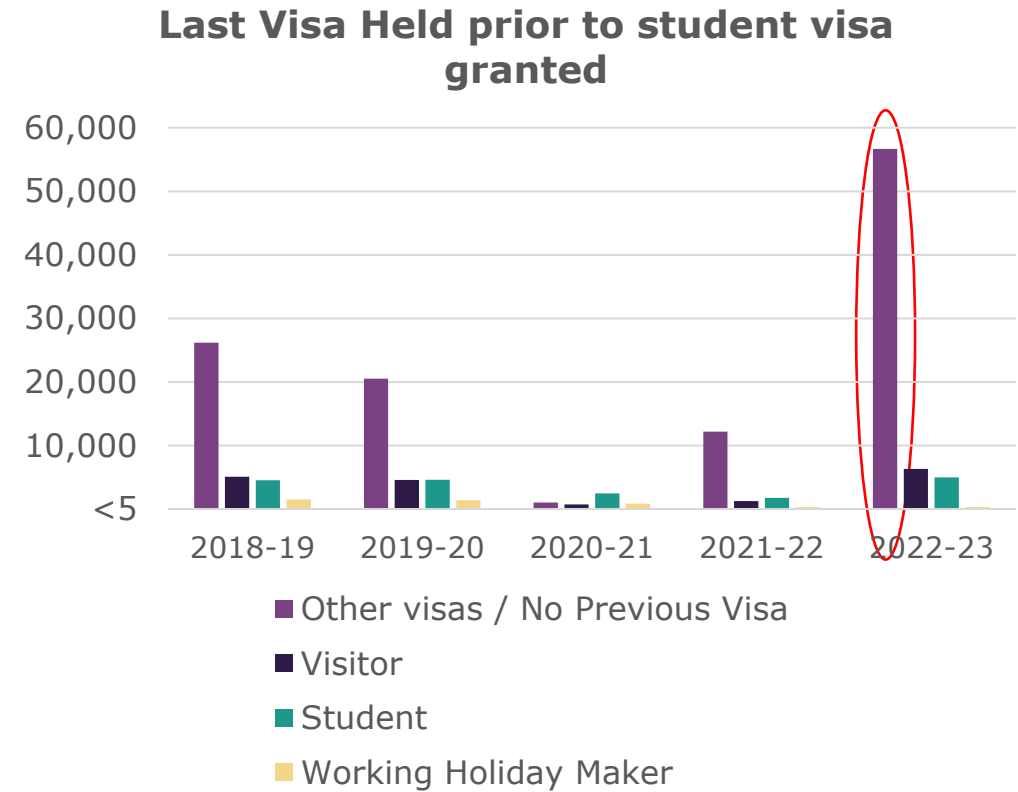
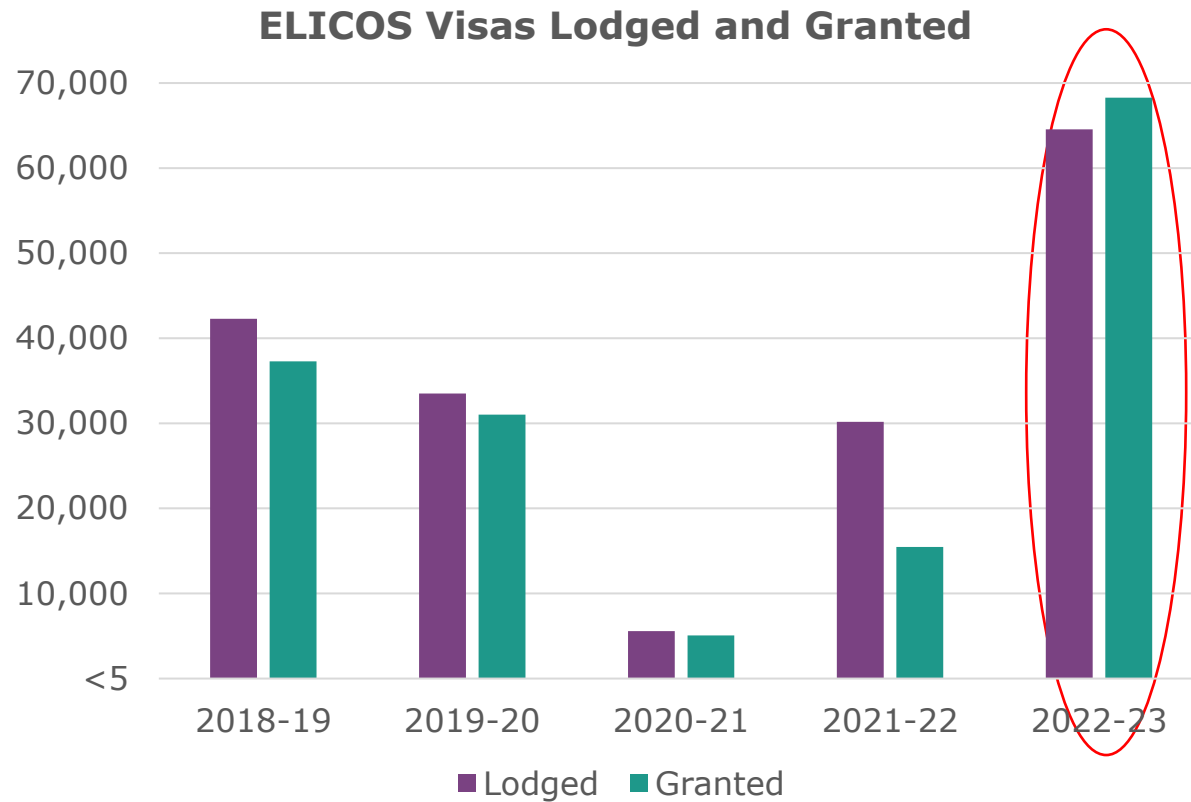


Student Visa Data

- ❖ Students visa holders
- ❖ Visa lodged
- ❖ Visa granted
- ❖ Grants rate

ELICOS visas lodged and granted

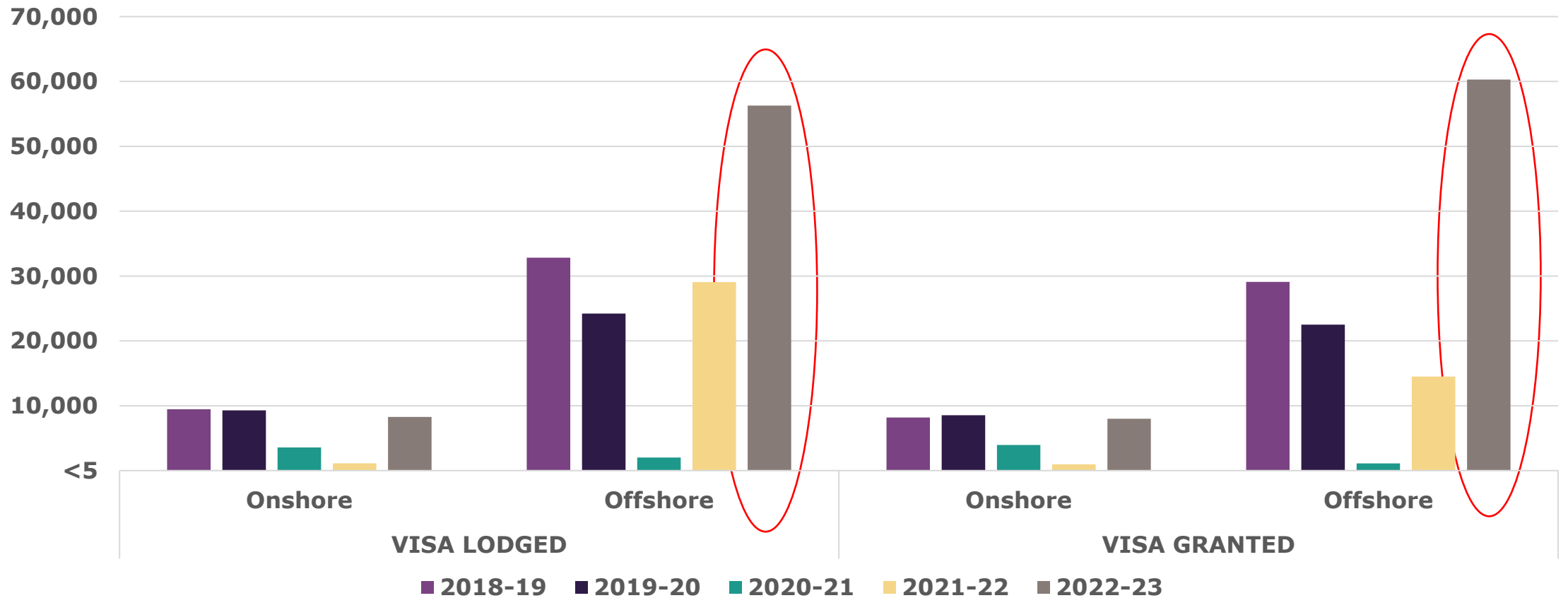
For the first time in five years, ELICOS visas granted exceeded visas lodged in FY2023.



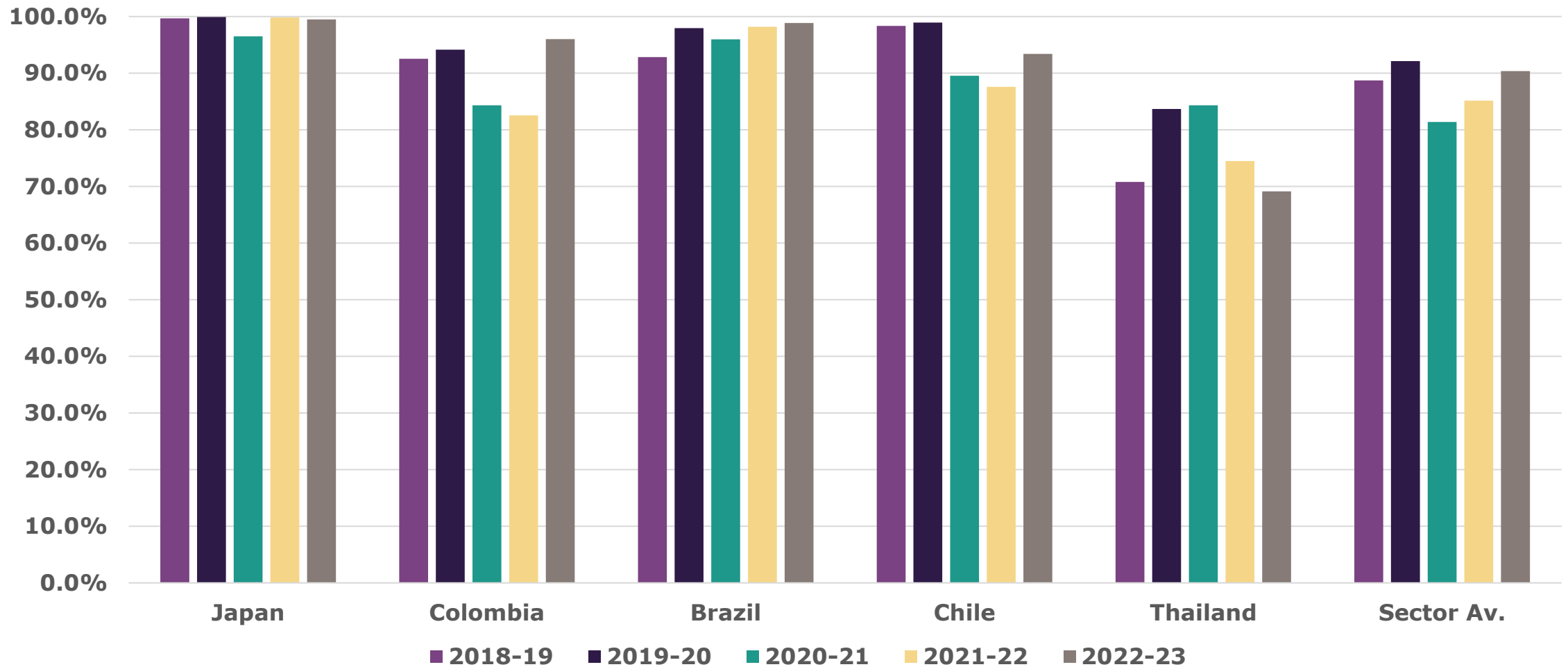
Note: Applications are based on the date the application was raised. Visa outcomes are based on the date of decision on the application and do not necessarily relate to applications made in the same period. For example, a decision in 2021 may relate to an application made in 2020.

ELICOS visa lodged and granted for onshore and offshore primary applicants

Majority of visas granted were for offshore primary applicants, accounting for 88 per cent of visas granted for FY2023 compared to 22 per cent at the heights of the pandemic (FY2021).



ELICOS student visa grant rates for top 5 markets by volume of visas granted



Market insights

Market insights

Colombia

- Strong return to growth from all LATAM markets (Argentina, Peru, Ecuador and Mexico, over 100% above commencements for YTD June 2019)
- Inflation (in all markets but esp Argentina) and in some cases, political instability, are driving young people to look at overseas options
- Australia is most popular student destination for Colombians
- Colombians value work opportunities, lifestyle and quality of education
- Low English proficiency - #77 of 111 - EF English Proficiency Index /Position in Latin America #17 of 20)
- English proficiency and HE qualifications are highly regarded and a must in some industry sectors

Brazil

- Australia is well-regarded
- Brazilians value lifestyle, quality of education and work opportunities
- International experience are very well regarded among Brazilian employers
- Need to increase English fluency for teachers, researchers and students
 - Brazil is considered a 'low English proficiency' country (#60 of 111 - EF English Proficiency Index /Position in Latin America #12 of 20)
- Australia the #5 destination country for study abroad (source: BELTA market research 2023)
 - Given the strong growth from Brazil, imagine the potential if Australia were more preferred.

Market insights

China

- Primarily taking ELICOS as a pathway to HE or VET
- As universities recruit more students from Tier 3, 4 and beyond cities, less familiarity with English means more will need to include ELICOS pre-study.
- Authorities are scaling down earlier emphasis on English learning through school (i.e. Shanghai moved it from compulsory to optional course for zhongkao). However, there are many low-cost local alternatives in-country.
- End of pandemic phase, slowing economy, tough graduate employment market, skills gaps, domestic and international competition
- Seeking: high-quality, accessible education, safe & welcoming environment, attractive lifestyle, & employment outcomes

Thailand

- Low proficiency, 97/111 EF Index
- Thai Government is making English language teaching and learning a central theme across all levels of education.
 - Creating opportunities for in-country delivery of English language teacher training.
- English language training is also a pre-requisite for Thai government scholarship holders.
- Despite the price-sensitivity, Australia remains a competitive English language training destination due to the attractive work rights for student visa holders.
- Thai working holiday visa makers also take short-term English language study

Market insights

Japan

- Demand from individual students (mainly university students or working holiday makers) to spend weeks/months improving their English skills to get better jobs
- Demand for group study programs returning
 - Japan is a risk-averse market and group programs are particularly low risk as students are attending as part of their school/university.
 - Many agents and institutions don't have confidence to arrange them if not all students can get visas in a timely manner.
 - Requires promotion post COVID to rebuild confidence
- In market delivery, including native speakers online, are cheap and plentiful

South Korea

- Steady demand, but Koreans mostly prefer shorter length courses of less than 12 weeks, even 4 weeks on visitor/working holiday visas.
- EAP is popular amongst students, who go on to do degree courses.
 - Korean universities/colleges organise short-term ELICOS outbound programs to overseas universities including in Australia.
- In-market delivery of cheap English courses has taken away a lot of the standalone ELICOS/working holiday market to Australia.
- Short-term ELICOS outbound programs tend to be from the lower ranked/regional universities in Korea.

Market insights

Vietnam

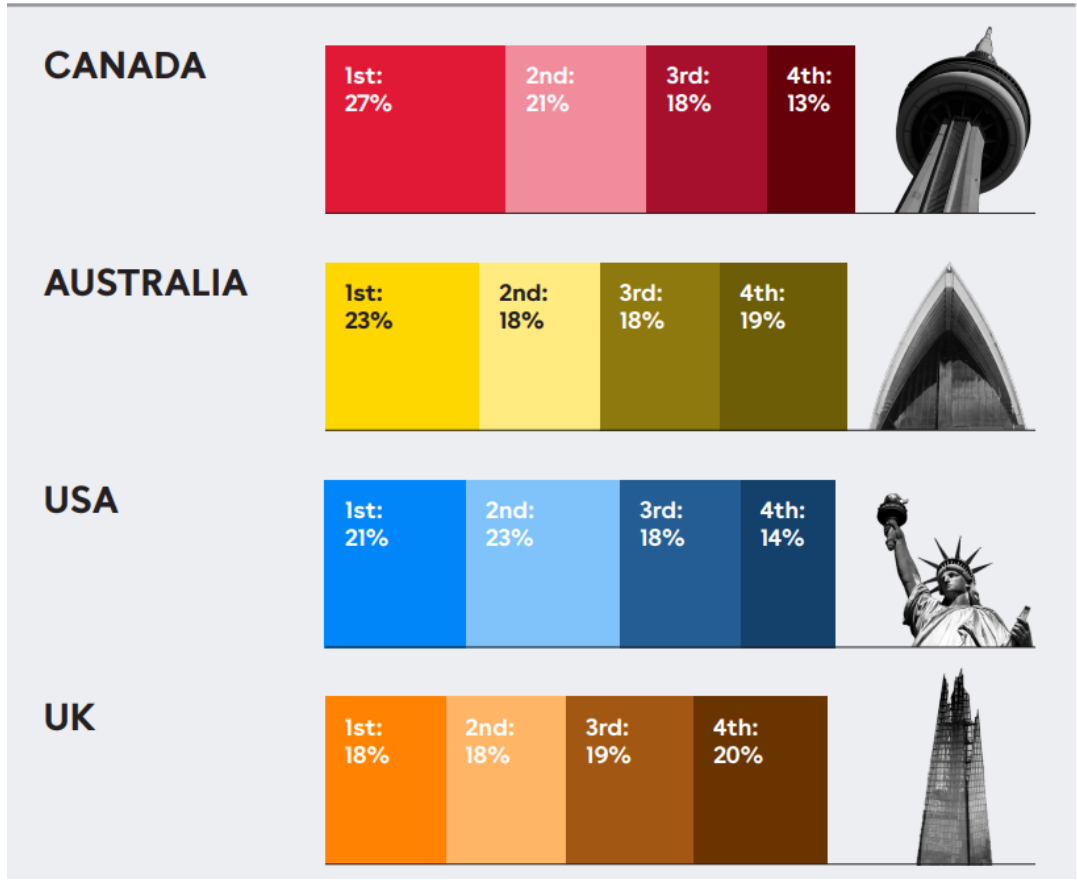
- Growth in ELICOS as pathway to HE
- ELICOS more sought-after in second-tier cities or provinces, where students have less access to English training centres.
- Some companies and provincial governments sending staff on language-specific study tours.
- English is a compulsory subject from Year 3 in public schools in Vietnam.
- Although the market is competitive, demand is consistent and is especially strong for English+ programs, English courses for university and college study, exam preparation and online English courses.

Taiwan

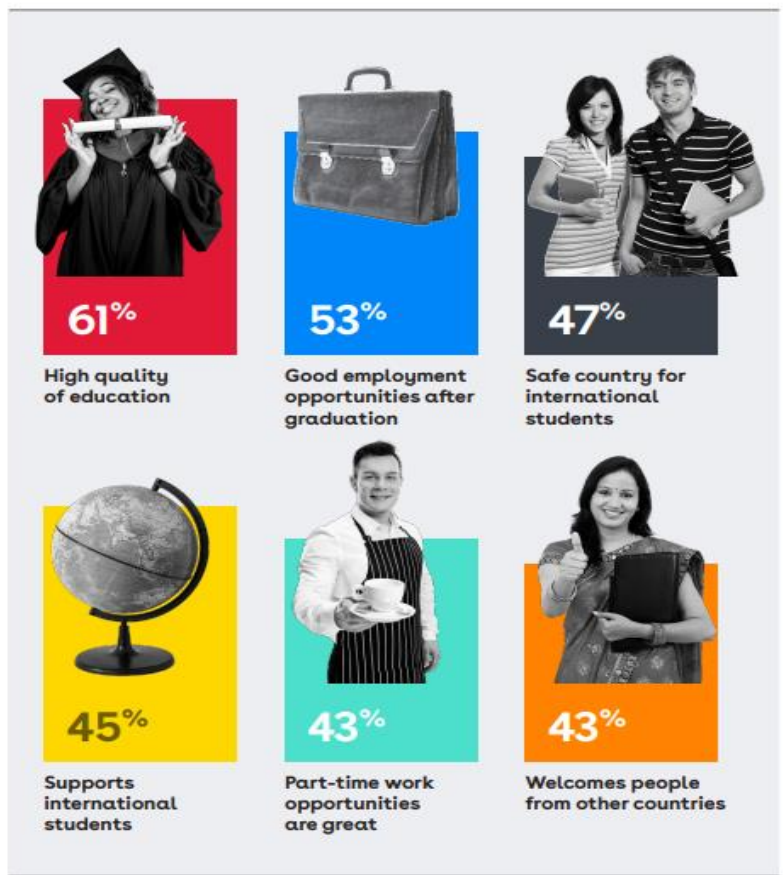
- Taiwan's Government seeks to lift English language capability across economy/society.
- Offshore study to strengthen English capability is perceived to have professional advantages.
- Australia second most popular destination after USA
- YTD June down 40% across all sectors c/f 2019
 - ELICOS down 55%
 - VET down 40%
 - Formerly 8th, now 17th

Preference for Australia & factors driving choice

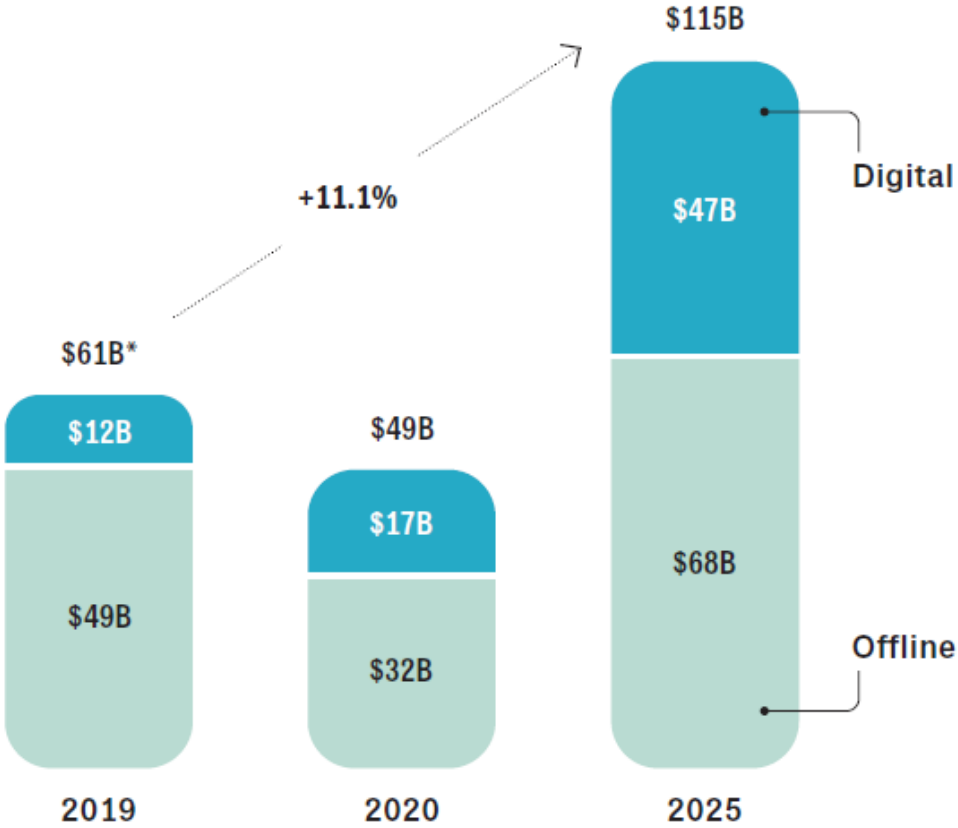
Market preference



Primary factors in first choice



Future of ELT



\$60B D2C language learning market to double by 2025, led by digital delivering 3X growth.
Holon IQ Education Intelligence Unit 11 May 2021

How we can help

Events and campaigns

Market	Activity	Date
India, Sri Lanka, Bangladesh	Study Australia Roadshow Chandigarh, New Delhi, Ahmedabad, Hyderabad, Bengaluru, Chennai, Colombo & Dhaka	4-16 September
Mongolia	Study Australia Fair	15-16 September
Vietnam	Shine & Thrive Can Tho, Ho Chi Minh City and Nha Trang	17-25 September
Taiwan	Study Australia Fair	22-23 September
LATAM	Study Australia Experience	September 2023 – June 2024
Ghana, Nigeria, Kenya	Study Australia Roadshow	22 Feb – 2 March 2024
Japan	Study Australia Fair	May 2024
South Korea	Study Australia Fair	May 2024



Insights and customised services

- **EDI = MIP + Partner Hub on 31 Aug**
 - Market insights, data, reports, opportunities (sales leads), events
 - New, clean design and navigation
 - Faster and easier access to student data, simplified data downloads
 - News and intelligence for providers
 - 400 organisations, 3,800 individuals subscribe
 - 12,000 receive the free fortnightly MIP newsletter
- **Partner Hub**
 - Study Australia marketing toolkit
 - Monthly agent bulletin
 - Global agent week (1,200 agents from 82 countries, 96% rating the event positively)
 - Mid year update event
- **Customised services**
- **Export Market Development Grant (EMDG)**

Introducing Education Data and Insights (EDI)

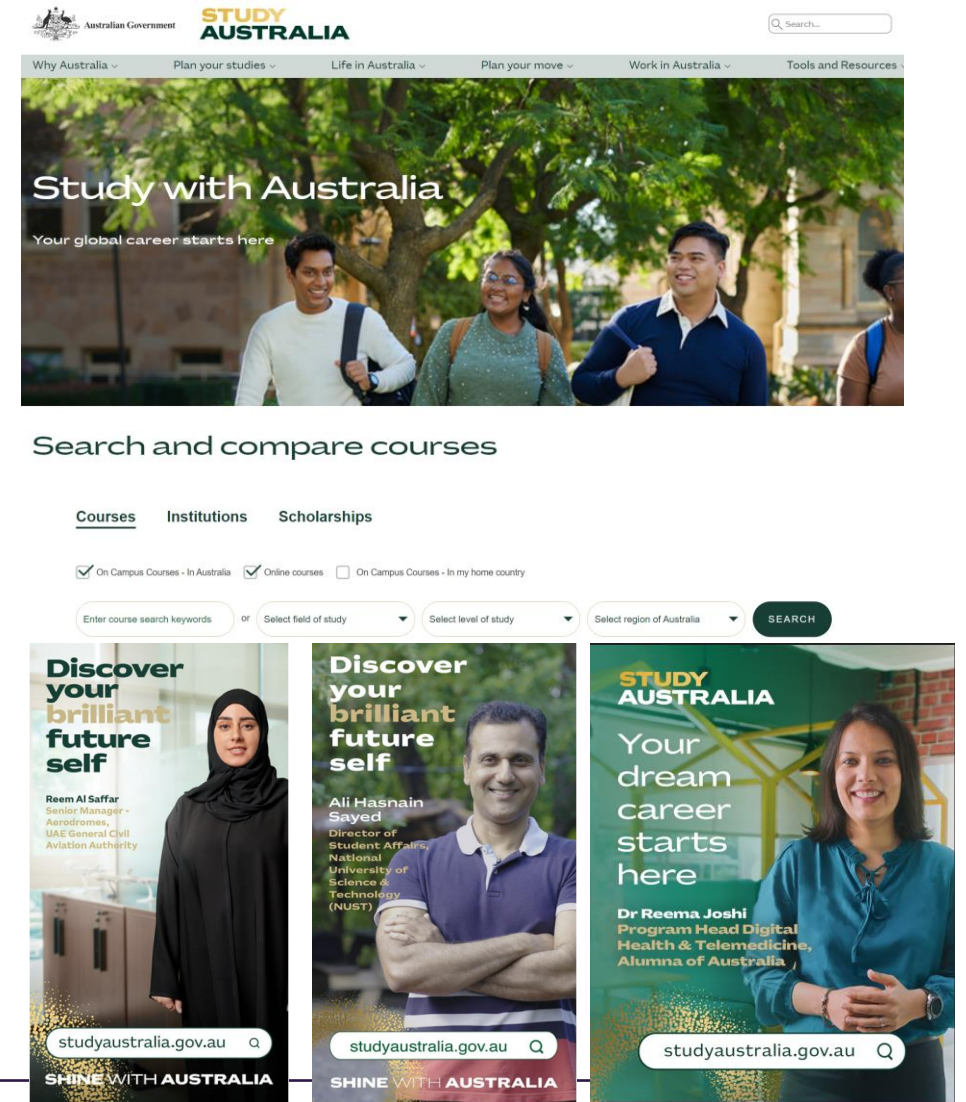
We have redesigned the way Austrade provides education market insights, data, analysis, and resources.

[Learn more about EDI](#)



Study Australia website

- Targeted campaigns, **global organic social** and **promotional activities** resulted in over 4,332,169 unique visits and 75,541,460 page views of the Study Australia website in the 22/23FY.
- In the 22/23FY, the Study Australia Course Search tool delivered **177,241 student leads** to Australian providers, including ELICOS.
- Campaigns in 2022/23 included:
 - Always on – paid search (India)
 - Discover your brilliant future self – Feb/March (Indonesia)
 - Discovery your brilliant future self – April/May (MEA)
- The redeveloped Study Australia website will be launched just prior to AIEC (**join the webinar 5 Oct 23**)
- New tools and resources include mobile-first access and navigation, translations in 10 languages, Chinese presence, and ongoing development of tools such as the Speaking English Practice Test, **Cost of Living Calculator**, Pre-departure Checklist



Tools on the Study Australia website



Career Matcher tool

Gives students a personalised reports on the ideal careers and courses that best suit their personality, interests and strengths.



Employment resources

Provides a wide range of information on seeking employment before and after studies, volunteering and work rights.



Speaking English Practice Test

Helps students prepare for English language tests like IELTS and PTE.



Cost of Living Calculator

Supports students to estimate how much their lifestyle choices will cost in Australia.



Industry Experience Program

Enables Australian and international students to work with peers in small, diverse teams on real-world industry projects.



Masterclass Library

Allows any interested learner to take a free masterclass by a renowned Australian academics.

Get in touch

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