International Student Enrolments in Australia by Sector in Comparison to Higher Education

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Summary – *The growth in international students enrolling at Australian educational institutions has been a major success story, especially since 2012. From 2002 to 2017 VET has expanded 4.9 times, higher education 2.8 times, ELICOS 2.7 times, non-award 2.1 times with schools only 1.1 times. Overall growth at 2.9 times presents challenges and risks. In 2017 44% of the international students were in higher education, 27% in VET, 19.4% in ELICOS, 6.3% non-award with only 3.2% in schools.*

Eight of the twenty nationalities that provided at least one percent of student enrolments in 2017 had a lower proportion of the annual cohort in 2017 compared with 2002. They are all strategically located in our region, - Malaysia, South Korea, Thailand, Indonesia, Taiwan, Hong Kong, Japan and Singapore. Four of these nationalities – Indonesia, Hong Kong, Japan and Singapore – actually had fewer students enrolled in Australian educational institutions in 2017 compared with 2002. The narrowing of the demographic diversity of provider nations should be of national concern. The outcome does have significant implications for the strength of Australia's engagement with our regional neighbours.

New entries into the top 20 student provider nations in 2017 were Nepal, Columbia, Pakistan, Philippines, Italy and Spain displacing the 2002 ranked nations Norway, Bangladesh, United Kingdom, Sweden, Germany and Czech Republic. Five of the six displaced nations were from Europe for a net loss of three. This changed demographic distribution does highlight Australia's student recruitment reorientation to Asia and the Middle East away from Europe.

At an earlier time, originating with the Colombo Plan, the Federal Government did have a proactive role in sponsoring students from underrepresented strategically important countries in the region. It is timely to again consider such a sponsorship initiative in the context of a broader national discussion for the management of economic, social and political risks associated with demographically unregulated international student enrolments.

Introduction

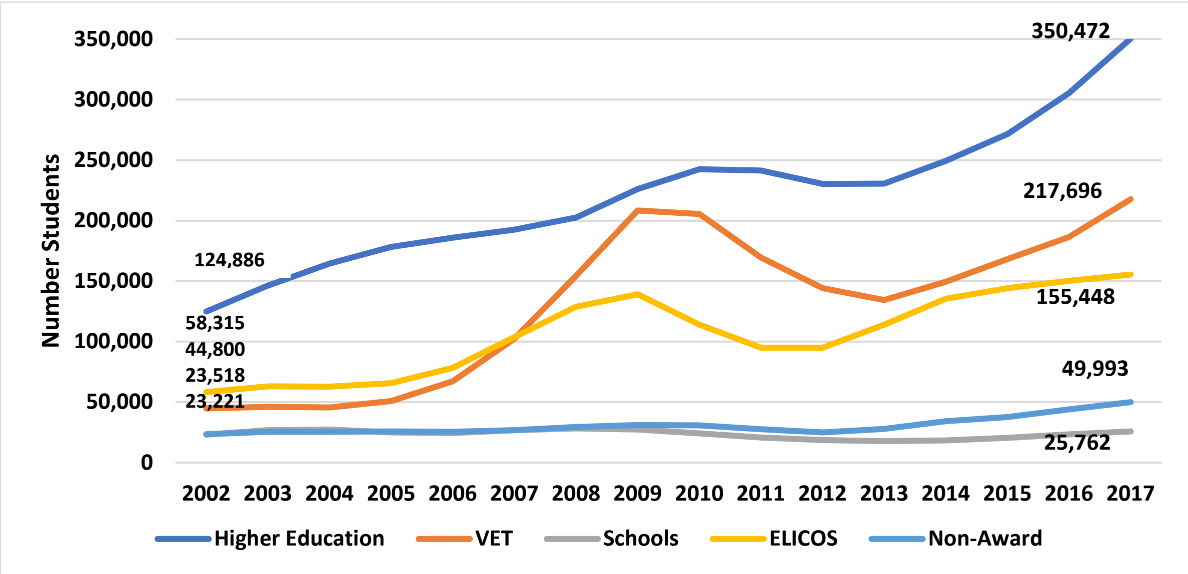
Australia has excelled as a provider of educational opportunity for international students at all levels. Educational services are now Australia's third largest export after the commodities iron ore and coal. It is timely to review some of the student trends and implications that underpin this successful economic outcome.

International student onshore course enrolment datasets by nationality are available from the Commonwealth Provider Registration and International Student Management System (PRISMS) released monthly by the Department of Education and Training (1). A student's nationality is based upon citizenship data provided by the Department of Immigration and Citizenship (DIAC) and by educational institutions. The international student enrolment data are available for all education sectors – higher education, vocational education, schools, ELICOS and non-award for the period 2002 to 2018. In an earlier article (2) the narrowing demographic diversity of students enrolled in higher education institutions was reviewed. The financial vulnerability of the higher education system, because of its dependency on international students and the impact on the academic experiences of all students, was discussed. In this paper enrolment trends for all sectors are reviewed to provide a broader overall perspective.

Student Enrolments by Sector

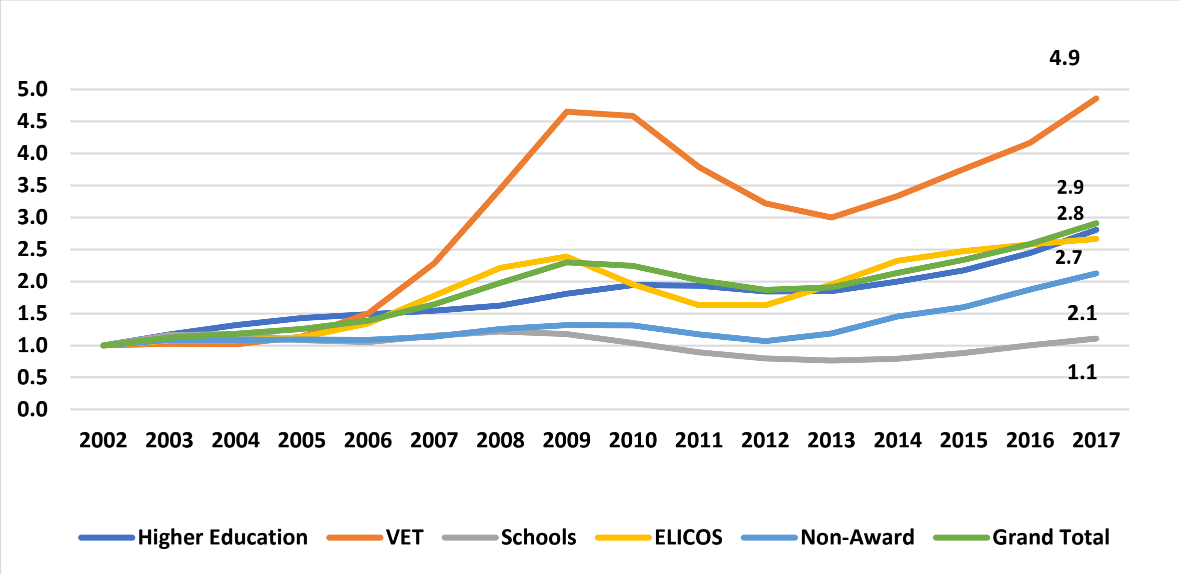
The primary enrolment data by sector are presented in Appendix A for the period 2002 to 2017. International student numbers increased from 274,740 in 2002 to 799,371 in 2017 – a 2.9 fold increase. Numbers peaked in 2009, then declined until 2012, before recovering strongly in recent years. The trends for the individual sectors are shown graphically in figure 1.

Figure 1. International Student Enrolment Numbers by Sector 2002 to 2017



The higher education sector has consistently attracted the most students with Vocational Education and Training (VET) numbers overtaking English Language Intensive Courses for Overseas Students (ELICOS) from 2007. Perceived personal safety factors, principally involving Indian students, and financial constraints impacted on all sectors in the period 2009 to 2012 with VET and ELICOS most severely affected. This experience should be an important risk management signal for those educational institutions that have become so dependent on international students for core funding. The student growth by sector relative to 2002 is shown in appendix C and in figure 2.

Figure 2. International Student Enrolment Growth by Sector relative to 2002



VET has recorded the highest annual growth in the period 2002 to 2017 making a strong recovery after the decline from 2009 to 2013. In 2017 there were 4.9 times more VET international students than in 2002. Higher education has grown by 2.8 times, ELICOS by 2.7 times, non-award by 2.1 times, but school enrolments have increased by only 1.1 times. Overall, the total number of international student with visas in 2017 was 2.9 times the 2002 enrolment numbers.

The percentage of international students enrolled in each year by sector is reported in appendix B. In 2017 the percentage distribution was: higher education 43.8%, VET 27.2%, schools 3.2%, ELICOS 19.4%, Non-award 6.3%. By way of comparison the distribution in 2002 was: Higher education 45.5%, VET 16.3%, Schools 8.5%, ELICOS 21.2% and non-award 8.6%. The strong growth in the VET enrolments has resulted in the significant proportional increase, while the proportional school enrolments decline to only 3.2% of all international enrolees is most notable. School numbers have improved marginally since 2012, but at well below other sectors. Higher education as a proportion of the total enrolments peaked in 2005 (51.6%), VET in 2010 at 33.3%, ELICOS in 2014 at 23.1%, while school enrolments as a proportion of the total have been in steady decline since 2003 at 8.8%.

Total Enrolment Distribution by Nationality

International students from 193 nationalities were studying in Australia in 2017. This is a remarkable achievement which underlines the high regard held world-wide for Australian education programs. Those nationalities that provided at least one percent of the total student enrolments are profiled here. There are 20 nationalities in this group in 2017. They are listed in 2017 rank order in Appendix D, ranging from China with 231,191 students to Spain with 7,729 students. In 2017 these 20 nationalities provided 85.7% of the international student population compared with 81.3% in 2002. It is noteworthy that China and India together provided almost 40% of the students in 2017 compared with 21.8% in 2002 (Appendix E). China has been the dominant provider of international students throughout this period. India was ranked ninth in 2002, but since 2005 it has surpassed all other nationalities except China. Taiwan and Hong Kong are listed as nationalities separate from China in the PRISMS statistics.

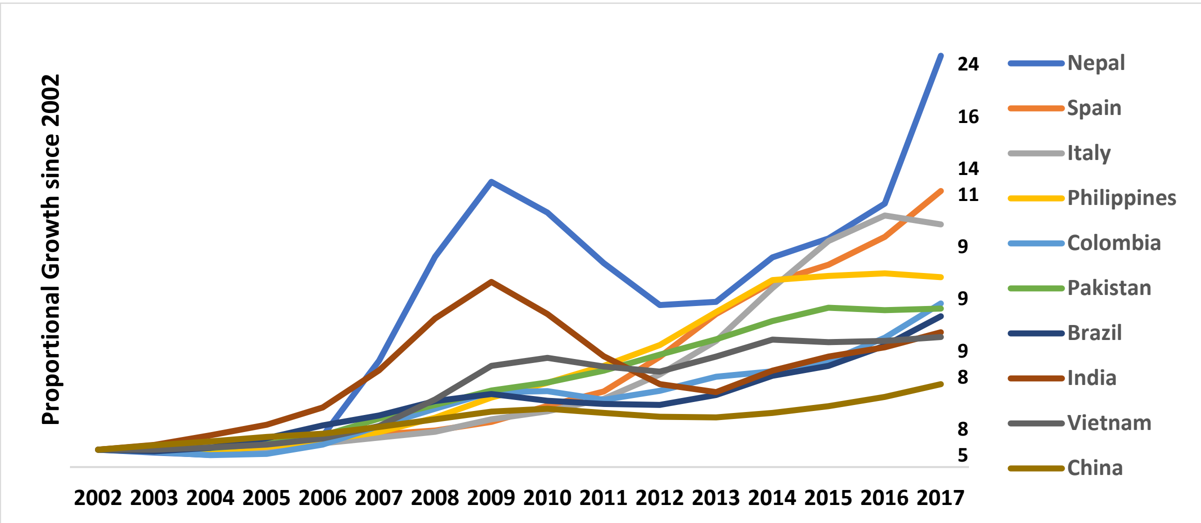
If these enrolments were consolidated the dominance would be increased by 4.5% in 2017. Two South American nations, Brazil and Columbia, and two European nations Italy and Spain are among the top 20 providers. The remainder are from Asian regions except for the USA.

The emergence of some countries as important providers of students and the decline of others since 2002 is very interesting. The 2017 providers, Nepal, Columbia, Pakistan, Philippines, Italy and Spain were not among the top 20 providers in 2002. Five of the six countries that were in the top 20 in 2002, but not in 2017, were from Europe. They were Norway, United Kingdom. Sweden, Germany and Czech Republic, along with Bangladesh. The changing demographics do have consequences for Australia's international engagement in various regions of the world.

Consistent with the findings of an earlier study of higher education enrolments (2) eight of these twenty nationalities provided a lower proportion of the annual cohort in 2017 compared with 2002. They are all strategically located in our region, - Malaysia, South Korea, Thailand, Indonesia, Taiwan, Hong Kong, Japan and Singapore. Four of these nationalities – Indonesia, Hong Kong, Japan and Singapore – had fewer students enrolled in 2017 compared with 2002. A contributory factor, but not the sole reason, for the decline is undoubtedly increased local educational opportunities at school and higher education levels. The decline should be of concern because of the importance to Australia of these nationalities for political, social and economic reasons. Furthermore, the narrowing of the demographic diversity in Australian classrooms impacts on the richness of the educational experiences of all students. Australia should be promoting stronger educational engagements with our near regional neighbours.

The enrolment growth trends by nationality relative to 2002 are presented in Appendix F. Interestingly, the highest proportional growths are for Nepal (23.6 fold since 2002), Spain (15.9 fold), Italy (13.9 fold) and Philippines (10.9 fold). The 10 nationalities among the top 20 providers with the highest proportional growth are shown in figure 3.

Figure 3 Nationalities with the highest proportional growth from 2002 to 2017



The rapid growth between 2006 and 2009, especially for Nepal and India is striking with a strong recovery again since 2013. China, while commencing from the largest base in 2002, still had a fivefold increase in student numbers by 2017. The fluctuations that have occurred for certain nationalities, especially in the period 2009-2012, highlight the risks involved in concentrating the demographic distribution too narrowly on a few nationalities.

Enrolment Distribution by Nationality and Sector.

A more detailed investigation has been undertaken for the enrolment distribution between sectors for the top 10 nationalities with the highest total enrolments (appendix D). The 2017 data are presented in table 1. For individual nationalities there are wide variations in enrolment numbers between sectors.

Table 1. Enrolment numbers by sector for the ten highest provider nationalities in 2017

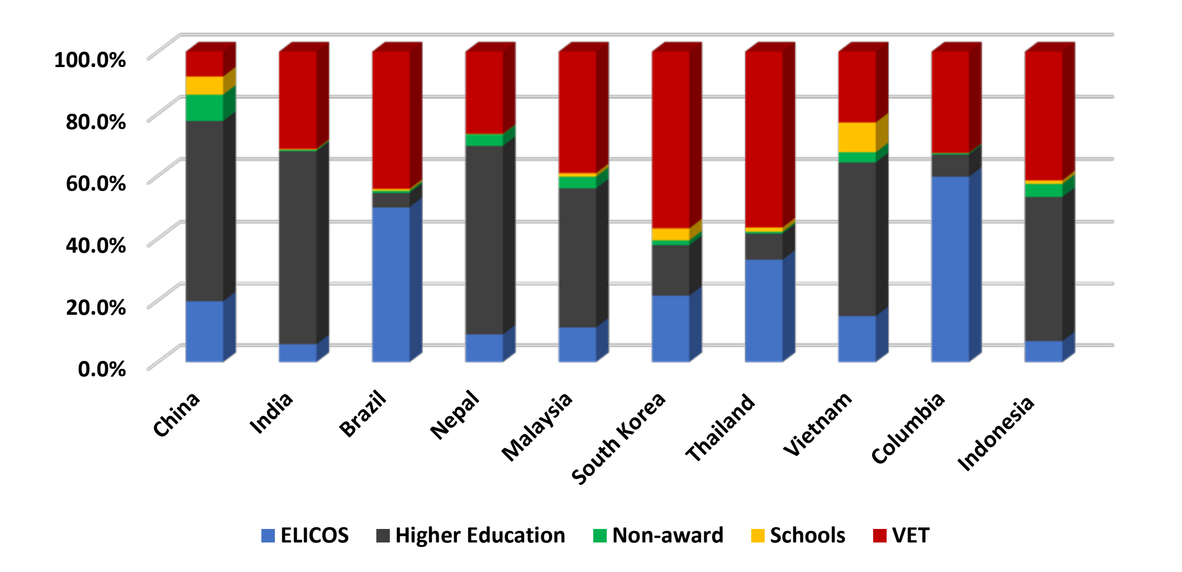
	China	India	Brazil	Nepal	Malaysia	South Korea	Thailand	Vietnam	Columbia	Indonesia
Higher Education	133,698	54,212	1,629	21,408	14,679	5,073	2,580	15,043	1,537	9,286
VET	18,490	27,385	16,098	9,350	12,830	17,593	17,282	6,951	7,049	8,291
Schools	13,507	231	237	44	375	1,204	427	2,921	15	229
ELICOS	45,576	5,063	18,219	3,172	3,682	6,690	10,180	4,542	12,899	1,360
Non-award	19,580	376	251	1,327	1,232	472	172	998	92	838
Total	230,851	87,267	36,434	35,301	32,798	31,032	30,641	30,455	21,592	20,004

The percentage enrolment distributions by sector for these ten largest provider nationalities in 2017 are shown in table 2. This information is also shown graphically in figure 4.

Table 2. Percentage enrolment distribution by sector for each of the ten largest provider nationalities in 2017

	China	India	Brazil	Nepal	Malaysia	South Korea	Thailand	Vietnam	Columbia	Indonesia
Higher Education	57.9%	62.1%	4.5%	60.6%	44.8%	16.3%	8.4%	49.4%	7.1%	46.4%
VET	8.0%	31.4%	44.2%	26.5%	39.1%	56.7%	56.4%	22.8%	32.6%	41.4%
Schools	5.9%	0.3%	0.7%	0.1%	1.1%	3.9%	1.4%	9.6%	0.1%	1.1%
ELICOS	19.7%	5.8%	50.0%	9.0%	11.2%	21.6%	33.2%	14.9%	59.7%	6.8%
Non-award	8.5%	0.4%	0.7%	3.8%	3.8%	1.5%	0.6%	3.3%	0.4%	4.2%

Figure 4. Enrolment distribution by Sector in 2017 for ten Nationalities



Higher education is the dominant sector for China (58%), India (62%), Nepal (61%), Malaysia (45%), Vietnam (49%) and Indonesia (46%). VET is dominant for South Korea (57%) and Thailand (56%) while being strong for India, Brazil, Malaysia, Columbia and Indonesia. ELICOS is the clear priority for the South American countries, Brazil (50%) and Columbia (60%). Given these profiles there is the capacity for institutions to be more strategic in their marketing and recruitment campaigns to increase demographic diversity.

Top 10 Nationalities in 2017 for Each Sector

An analysis of the top 10 nationalities for each sector in 2017 is presented in table 3 along with their percentage contribution. For clarity the rankings are given also in table 4 by nationality.

Table 3. Top 10 ranked nationalities overall and for each sector in 2017 with the percentage shown in brackets.

All Sectors	Higher Education	VET	Schools	ELICOS
China (28.9%)	China (38.2%)	India (12.7%)	China (52.6%)	China (29.3%)
India (11.0%)	India (15.5%)	China (8.5%)	Vietnam (11.4%)	Brazil (11.7%)
Brazil (4.6%)	Nepal (6.1%)	South Korea (8.1%)	South Korea (4.7%)	Columbia (8.3%)
Nepal (4.4%)	Vietnam (4.3%)	Thailand (8.0%)	Hong Kong (4.6%)	Thailand (6.6%)
Malaysia (4.1%)	Malaysia (4.2%)	Brazil (7.4%)	Germany (3.3%)	Japan (5.5%)
South Korea (3.9%)	Pakistan (3.1%)	Malaysia (5.9%)	Japan (3.2%)	South Korea (4.3%)
Thailand (3.8%)	Indonesia (2.7%)	Taiwan (4.3%)	Italy (2.2%)	Taiwan (3.5%)
Vietnam (3.8%)	Hong Kong (2.5%)	Nepal (4.3%)	PNG (2.0%)	India (3.3%)
Colombia (2.7%)	Sri Lanka (2.2%)	Indonesia (3.8%)	Thailand (1.5%)	Vietnam (2.9%)
Indonesia (2.5%)	Singapore (2.1%)	Colombia (3.3%)	Malaysia (1.5%)	Spain (2.7)

Table 4. Nationality Top 10 Sector Rankings by Nationality in 2017

	All Sectors	Higher Education	VET	Schools	ELICOS
China	**1**	**1**	**2**	**1**	**1**
India	**2**	**2**	**1**		**8**
Brazil	**3**		**5**		**2**
Nepal	**4**	**3**	**8**		
Malaysia	**5**	**5**	**6**	**10**	
South Korea	**6**		**3**	**3**	**6**
Thailand	**7**		**4**	**9**	**4**
Vietnam	**8**	**4**		**2**	**9**
Columbia	**9**		**10**		**3**
Indonesia	**10**	**7**	**9**		
Pakistan		**6**			
Hong Kong		**8**		**4**	
Sri Lanka		**9**			
Singapore		**10**			
Taiwan			**7**		**7**
Germany				**5**	
Japan				**6**	**5**
Italy				**7**	
PNG				**8**	
Spain					**10**

Some 20 nationalities have at least one top 10 sector ranking. The dominance of China is clear from this analysis, being ranked either one or two in every sector. India's strength is in higher education and VET, while Brazil excels in ELICOS. Four other countries Malaysia, South Korea, Thailand and Vietnam are prominent contributors to three sectors. There is clustering of some nationalities between ELICOS, Schools and VET, but marginal ranking alignment.

International Students as a proportion of Australian Education Sectors.

The proportion of international students in schools in Australia is relatively small at around 0.6% of the estimated 3.8 million enrolled students in 2016 (3). Similarly, the proportion for VET international students represents 4.4% of the estimated 4.2 million students in 2016 (4). By contrast, some 27% of the 1.5 million higher education students in 2016 were international enrolees (5). ELICOS is by its very construct dominated by international students. ELICOS and higher education sector are more vulnerable to international political and economic fluctuations for their financial viability than the school and VET sectors because of their high dependence on international students.

Policy Considerations.

The flow of international students to Australia is very strong and increasing markedly in all sectors except schools. There are clear benefits and risks linked to the recruitment successes. The higher education sector is financially the most vulnerable because of the high proportion of the student community coming from overseas (27%) with the profile being dominated by two nationalities, China and India, providing 54% of all enrolees. The VET sector has a much lower proportion of international students (4.4%) with a more even spread of provider nationalities. India and China provide only 21% of VET enrolees. Australia schools have the lowest proportion of international students at 0.6%, but 53% of those students come from one country, China. ELICOS is in a special category with the highest exposure to overseas students with some 50 percent of the students in 2017 coming from three countries, China, Brazil and Columbia. The prominence of Chinese students in all sectors does represent a significant strategic risk. Plans to mitigate this potential risk are warranted.

The narrowing of the demographic profile should be of some concern to policy makers for political, social and economic reasons. Some eight of the top twenty provider nationalities in 2017 each represented a lower proportion of the total student cohort than in 2002. Four of Australia's Asian neighbours, Indonesia, Hong Kong, Japan and Singapore provided fewer students than in 2002. Students educated in Australia do provide an important bridge back to their home nationality. At an earlier time, originating with the Colombo Plan, the Federal Government did have a proactive role in sponsoring students from underrepresented strategically important countries in the region. It is timely to again consider such a sponsorship initiative. There are some encouraging signs that there is also the potential to tap new markets. The emergence of Nepal, Pakistan, Philippines and Columbia as significant student providers in selective sectors is an important development. There is scope to strengthen links to Europe as occurred at an earlier time. The emergence of opportunities in Africa do also warrant further evaluation.

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Appendix A. International Students by Sector Enrolled in Australian Educational Institutions: 2002 to 2017

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Higher Education	124,886	146,391	164,404	178,231	185,841	192,545	202,564	226,108	242,477	241,419	230,340	230,713	249,354	271,650	305,486	350,472
VET	44,800	45,991	45,562	50,986	67,175	102,381	154,464	208,304	205,386	169,615	144,287	134,260	149,331	168,297	186,533	217,696
Schools	23,221	26,944	27,310	25,088	24,472	26,758	28,290	27,350	24,096	20,722	18,510	17,739	18,410	20,530	23,270	25,762
ELICOS	58,315	62,990	62,755	65,622	78,333	103,638	128,971	139,271	114,010	94,965	95,002	114,004	135,531	144,225	150,272	155,448
Non-Award	23,518	25,613	25,533	25,658	25,555	26,774	29,539	30,938	30,856	27,568	25,105	27,920	34,191	37,588	44,044	49,993
Grand Total	274,740	307,929	325,564	345,585	381,376	452,096	543,828	631,971	616,825	554,289	513,244	524,636	586,817	642,290	709,605	799,371

Appendix B. Percentage of International Student Enrolments by Year between the Sectors: 2002 to 2017

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Higher Education	45.5%	47.5%	50.5%	51.6%	48.7%	42.6%	37.2%	35.8%	39.3%	43.6%	44.9%	44.0%	42.5%	42.3%	43.1%	43.8%
VET	16.3%	14.9%	14.0%	14.8%	17.6%	22.6%	28.4%	33.0%	33.3%	30.6%	28.1%	25.6%	25.4%	26.2%	26.3%	27.2%
Schools	8.5%	8.8%	8.4%	7.3%	6.4%	5.9%	5.2%	4.3%	3.9%	3.7%	3.6%	3.4%	3.1%	3.2%	3.3%	3.2%
ELICOS	21.2%	20.5%	19.3%	19.0%	20.5%	22.9%	23.7%	22.0%	18.5%	17.1%	18.5%	21.7%	23.1%	22.5%	21.2%	19.4%
Non-Award	8.6%	8.3%	7.8%	7.4%	6.7%	5.9%	5.4%	4.9%	5.0%	5.0%	4.9%	5.3%	5.8%	5.9%	6.2%	6.3%
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Appendix C. Annual Enrolment Growth Trends by Sector Relative to 2002

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Higher Education	1.0	1.2	1.3	1.4	1.5	1.5	1.6	1.8	1.9	1.9	1.8	1.8	2.0	2.2	2.4	2.8
VET	1.0	1.0	1.0	1.1	1.5	2.3	3.4	4.6	4.6	3.8	3.2	3.0	3.3	3.8	4.2	4.9
Schools	1.0	1.2	1.2	1.1	1.1	1.2	1.2	1.2	1.0	0.9	0.8	0.8	0.8	0.9	1.0	1.1
ELICOS	1.0	1.1	1.1	1.1	1.3	1.8	2.2	2.4	2.0	1.6	1.6	2.0	2.3	2.5	2.6	2.7
Non-Award	1.0	1.1	1.1	1.1	1.1	1.1	1.3	1.3	1.3	1.2	1.1	1.2	1.5	1.6	1.9	2.1
Grand Total	1.0	1.1	1.2	1.3	1.4	1.6	2.0	2.3	2.2	2.0	1.9	1.9	2.1	2.3	2.6	2.9

Appendix D. The 20 Nationalities Contributing at least One Percent of the International students in 2017: Ranked Accordingly

Nationality	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
China	48,510	60,764	71,807	83,779	93,285	111,456	132,974	154,601	162,225	151,017	140,092	138,908	150,801	169,652	195,731	231,191
India	11,317	14,313	20,673	27,478	38,685	62,889	96,664	120,464	99,489	71,999	53,883	48,831	62,748	71,974	77,841	87,615
Brazil	4,210	3,802	4,697	7,015	10,104	12,476	15,984	17,654	16,027	15,258	15,025	17,477	22,101	24,528	29,347	36,496
Nepal	1,498	1,254	1,051	1,285	2,681	9,143	18,101	24,571	21,907	17,565	13,940	14,241	18,061	19,681	22,684	35,423
Malaysia	17,502	19,821	19,993	19,310	19,073	19,779	21,160	23,150	23,241	22,770	21,488	21,129	21,954	24,099	28,295	32,899
South Korea	18,664	22,205	23,835	26,220	31,045	34,487	35,414	35,787	33,793	29,673	27,486	27,388	27,804	28,573	30,444	31,112
Thailand	15,705	17,119	16,317	16,486	17,813	19,915	22,407	26,442	24,835	21,577	20,083	21,609	25,434	27,660	30,316	30,730
Vietnam	4,084	4,070	4,604	5,297	6,712	9,635	15,889	23,766	25,651	23,577	22,419	25,931	29,929	29,355	29,589	30,536
Colombia	2,299	1,989	1,577	1,734	2,990	5,445	7,713	9,908	10,025	8,886	10,069	11,948	12,643	13,959	17,092	21,628
Indonesia	21,003	20,395	18,109	16,103	14,902	14,810	16,010	17,839	18,285	17,840	17,430	17,104	17,886	19,259	19,751	20,028
Taiwan	9,949	10,597	10,199	9,637	9,974	9,744	9,175	8,988	8,410	7,570	7,177	8,196	10,139	13,541	16,443	18,227
Hong Kong	20,927	22,478	20,970	18,378	15,824	13,315	11,204	10,881	11,519	11,726	11,542	12,638	14,454	15,920	17,508	17,772
Japan	17,413	19,492	20,026	19,015	17,714	16,106	13,548	12,638	11,792	10,986	11,036	11,524	11,971	12,865	14,661	16,041
Pakistan	1,728	1,746	1,895	2,293	3,137	4,812	6,166	7,594	8,392	9,566	11,159	12,689	14,510	15,829	15,593	15,738
USA	11,150	12,602	12,828	12,602	12,033	11,810	11,580	10,784	10,498	10,342	9,563	9,492	9,517	10,076	10,812	11,857
Philippines	990	925	948	1,151	1,510	1,989	2,802	3,954	4,787	5,767	6,943	8,814	10,650	10,883	11,025	10,803
Sri Lanka	3,174	3,176	3,356	3,861	5,020	6,681	8,043	8,602	7,742	6,455	5,553	5,251	5,781	6,638	7,978	10,528
Italy	735	872	860	755	1,006	1,251	1,486	2,016	2,362	2,877	3,909	5,329	7,566	9,545	10,630	10,248
Singapore	12,092	11,868	10,878	9,899	9,246	8,814	8,820	9,387	9,568	9,449	9,132	8,827	8,493	8,338	8,122	8,335
Spain	487	584	609	718	816	915	1,027	1,261	1,710	2,116	3,086	4,284	5,174	5,669	6,445	7,729
Sub total Top 21	223,437	250,072	265,232	283,016	313,570	375,472	456,167	530,287	512,258	457,016	421,015	431,610	487,616	538,044	600,307	684,936
Grand Total	274,740	307,929	325,564	345,585	381,376	452,096	543,828	631,971	616,825	554,289	513,244	524,636	586,817	642,290	709,605	799,371

Appendix E Percentage of International Student Enrolments by year for top 20 Nationalities in 2017

Nationality	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
China	17.7%	19.7%	22.1%	24.2%	24.5%	24.7%	24.5%	24.5%	26.3%	27.2%	27.3%	26.5%	25.7%	26.4%	27.6%	28.9%
India	4.1%	4.6%	6.3%	8.0%	10.1%	13.9%	17.8%	19.1%	16.1%	13.0%	10.5%	9.3%	10.7%	11.2%	11.0%	11.0%
Brazil	1.5%	1.2%	1.4%	2.0%	2.6%	2.8%	2.9%	2.8%	2.6%	2.8%	2.9%	3.3%	3.8%	3.8%	4.1%	4.6%
Nepal	0.5%	0.4%	0.3%	0.4%	0.7%	2.0%	3.3%	3.9%	3.6%	3.2%	2.7%	2.7%	3.1%	3.1%	3.2%	4.4%
Malaysia	6.4%	6.4%	6.1%	5.6%	5.0%	4.4%	3.9%	3.7%	3.8%	4.1%	4.2%	4.0%	3.7%	3.8%	4.0%	4.1%
South Korea	6.8%	7.2%	7.3%	7.6%	8.1%	7.6%	6.5%	5.7%	5.5%	5.4%	5.4%	5.2%	4.7%	4.4%	4.3%	3.9%
Thailand	5.7%	5.6%	5.0%	4.8%	4.7%	4.4%	4.1%	4.2%	4.0%	3.9%	3.9%	4.1%	4.3%	4.3%	4.3%	3.8%
Vietnam	1.5%	1.3%	1.4%	1.5%	1.8%	2.1%	2.9%	3.8%	4.2%	4.3%	4.4%	4.9%	5.1%	4.6%	4.2%	3.8%
Colombia	0.8%	0.6%	0.5%	0.5%	0.8%	1.2%	1.4%	1.6%	1.6%	1.6%	2.0%	2.3%	2.2%	2.2%	2.4%	2.7%
Indonesia	7.6%	6.6%	5.6%	4.7%	3.9%	3.3%	2.9%	2.8%	3.0%	3.2%	3.4%	3.3%	3.0%	3.0%	2.8%	2.5%
Taiwan	3.6%	3.4%	3.1%	2.8%	2.6%	2.2%	1.7%	1.4%	1.4%	1.4%	1.4%	1.6%	1.7%	2.1%	2.3%	2.3%
Hong Kong	7.6%	7.3%	6.4%	5.3%	4.1%	2.9%	2.1%	1.7%	1.9%	2.1%	2.2%	2.4%	2.5%	2.5%	2.5%	2.2%
Japan	6.3%	6.3%	6.2%	5.5%	4.6%	3.6%	2.5%	2.0%	1.9%	2.0%	2.2%	2.2%	2.0%	2.0%	2.1%	2.0%
Pakistan	0.6%	0.6%	0.6%	0.7%	0.8%	1.1%	1.1%	1.2%	1.4%	1.7%	2.2%	2.4%	2.5%	2.5%	2.2%	2.0%
USA	4.1%	4.1%	3.9%	3.6%	3.2%	2.6%	2.1%	1.7%	1.7%	1.9%	1.9%	1.8%	1.6%	1.6%	1.5%	1.5%
Philippines	0.4%	0.3%	0.3%	0.3%	0.4%	0.4%	0.5%	0.6%	0.8%	1.0%	1.4%	1.7%	1.8%	1.7%	1.6%	1.4%
Sri Lanka	1.2%	1.0%	1.0%	1.1%	1.3%	1.5%	1.5%	1.4%	1.3%	1.2%	1.1%	1.0%	1.0%	1.0%	1.1%	1.3%
Italy	0.3%	0.3%	0.3%	0.2%	0.3%	0.3%	0.3%	0.3%	0.4%	0.5%	0.8%	1.0%	1.3%	1.5%	1.5%	1.3%
Singapore	4.4%	3.9%	3.3%	2.9%	2.4%	1.9%	1.6%	1.5%	1.6%	1.7%	1.8%	1.7%	1.4%	1.3%	1.1%	1.0%
Spain	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.3%	0.4%	0.6%	0.8%	0.9%	0.9%	0.9%	1.0%
Sub total Top 21	81.3%	81.2%	81.5%	81.9%	82.2%	83.1%	83.9%	83.9%	83.0%	82.5%	82.0%	82.3%	83.1%	83.8%	84.6%	85.7%
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Appendix F. Enrolment Growth Trends by Nationality Relative to 2002.

Nationality	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
China	1.0	1.3	1.5	1.7	1.9	2.3	2.7	3.2	3.3	3.1	2.9	2.9	3.1	3.5	4.0	4.8
India	1.0	1.3	1.8	2.4	3.4	5.6	8.5	10.6	8.8	6.4	4.8	4.3	5.5	6.4	6.9	7.7
Brazil	1.0	0.9	1.1	1.7	2.4	3.0	3.8	4.2	3.8	3.6	3.6	4.2	5.2	5.8	7.0	8.7
Nepal	1.0	0.8	0.7	0.9	1.8	6.1	12.1	16.4	14.6	11.7	9.3	9.5	12.1	13.1	15.1	23.6
Malaysia	1.0	1.1	1.1	1.1	1.1	1.1	1.2	1.3	1.3	1.3	1.2	1.2	1.3	1.4	1.6	1.9
South Korea	1.0	1.2	1.3	1.4	1.7	1.8	1.9	1.9	1.8	1.6	1.5	1.5	1.5	1.5	1.6	1.7
Thailand	1.0	1.1	1.0	1.0	1.1	1.3	1.4	1.7	1.6	1.4	1.3	1.4	1.6	1.8	1.9	2.0
Vietnam	1.0	1.0	1.1	1.3	1.6	2.4	3.9	5.8	6.3	5.8	5.5	6.3	7.3	7.2	7.2	7.5
Colombia	1.0	0.9	0.7	0.8	1.3	2.4	3.4	4.3	4.4	3.9	4.4	5.2	5.5	6.1	7.4	9.4
Indonesia	1.0	1.0	0.9	0.8	0.7	0.7	0.8	0.8	0.9	0.8	0.8	0.8	0.9	0.9	0.9	1.0
Taiwan	1.0	1.1	1.0	1.0	1.0	1.0	0.9	0.9	0.8	0.8	0.7	0.8	1.0	1.4	1.7	1.8
Hong Kong	1.0	1.1	1.0	0.9	0.8	0.6	0.5	0.5	0.6	0.6	0.6	0.6	0.7	0.8	0.8	0.8
Japan	1.0	1.1	1.2	1.1	1.0	0.9	0.8	0.7	0.7	0.6	0.6	0.7	0.7	0.7	0.8	0.9
Pakistan	1.0	1.0	1.1	1.3	1.8	2.8	3.6	4.4	4.9	5.5	6.5	7.3	8.4	9.2	9.0	9.1
USA	1.0	1.1	1.2	1.1	1.1	1.1	1.0	1.0	0.9	0.9	0.9	0.9	0.9	0.9	1.0	1.1
Philippines	1.0	0.9	1.0	1.2	1.5	2.0	2.8	4.0	4.8	5.8	7.0	8.9	10.8	11.0	11.1	10.9
Sri Lanka	1.0	1.0	1.1	1.2	1.6	2.1	2.5	2.7	2.4	2.0	1.7	1.7	1.8	2.1	2.5	3.3
Italy	1.0	1.2	1.2	1.0	1.4	1.7	2.0	2.7	3.2	3.9	5.3	7.3	10.3	13.0	14.5	13.9
Singapore	1.0	1.0	0.9	0.8	0.8	0.7	0.7	0.8	0.8	0.8	0.8	0.7	0.7	0.7	0.7	0.7
Spain	1.0	1.2	1.3	1.5	1.7	1.9	2.1	2.6	3.5	4.3	6.3	8.8	10.6	11.6	13.2	15.9
Sub total Top 21	1.0	1.1	1.2	1.3	1.4	1.7	2.0	2.4	2.3	2.0	1.9	1.9	2.2	2.4	2.7	3.1
Grand Total	1.0	1.1	1.2	1.3	1.4	1.6	2.0	2.3	2.2	2.0	1.9	1.9	2.1	2.3	2.6	2.9