National survey of ELICOS providers in Australia

179,342 ELICOS STUDENTS IN 2018 (ALL VISAS)

ELICOS share by visa type

- Visitor: 23%
- Working Holiday: 6%
- Other: 4%
- Student: 67%

ELICOS share by state

- VIC/TAS: 25%
- NSW/ACT: 39%
- QLD/NT: 26%
- WA: 7%
- SA: 3%

TOP 10 NATIONALITIES IN ELICOS

<table>
<thead>
<tr>
<th>Nationality</th>
<th>2017</th>
<th>2018</th>
<th>Growth on 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>42,417</td>
<td>42,596</td>
<td>14%</td>
</tr>
<tr>
<td>Japan</td>
<td>25,408</td>
<td>25,711</td>
<td>8%</td>
</tr>
<tr>
<td>Brazil</td>
<td>16,165</td>
<td>15,674</td>
<td>21%</td>
</tr>
<tr>
<td>South Korea</td>
<td>13,149</td>
<td>12,882</td>
<td>-3%</td>
</tr>
<tr>
<td>Colombia</td>
<td>10,472</td>
<td>11,980</td>
<td>13%</td>
</tr>
<tr>
<td>Thailand</td>
<td>8,576</td>
<td>7,833</td>
<td>-18%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>7,230</td>
<td>6,896</td>
<td>-4%</td>
</tr>
<tr>
<td>India</td>
<td>4,775</td>
<td>5,551</td>
<td>4%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>4,100</td>
<td>4,230</td>
<td>-2%</td>
</tr>
<tr>
<td>Spain</td>
<td>3,731</td>
<td>3,885</td>
<td>-2%</td>
</tr>
</tbody>
</table>

ELICOS STUDENTS BY SOURCE REGION

- Asia Pacific: 2017 120,476, 2018 121,730, 3%
- Europe: 2017 20,597, 2018 18,412, -14%
- Americas: 2017 31,527, 2018 33,645, 17%
- M.East & N. Africa: 2017 4,643, 2018 4,933, -7%
- Sub-Saharan Africa: 2017 454, 2018 622, -55%

GLOBAL MARKET SHARE IN 2017

Top five English teaching destinations in 2017

1. United Kingdom
2. United States of America
3. Australia
4. Canada
5. Ireland

ELICOS STUDENTS BY PROVIDER LOCATION AND BY VISA TYPE

- Metropolitan: 46%
- Regional: 21%
- Student Visa: 68%
- Visitor: 7%
- Working holiday: 4%
- Other: 5%

215 CRICOS registered institutions participated in 2018 survey. 62% response rate