

International Education: Global and Local Snapshot

Australian Council of Graduate Research
National Meeting

RISHEN SHEKHAR (IEAA – SF) IEAA BOARD MEMBER / FORMER
INTERNATIONAL STUDENT

TUESDAY, 14 APRIL 2026

Looking Back

2010 – 2019 (Pre COVID) - Demand Era

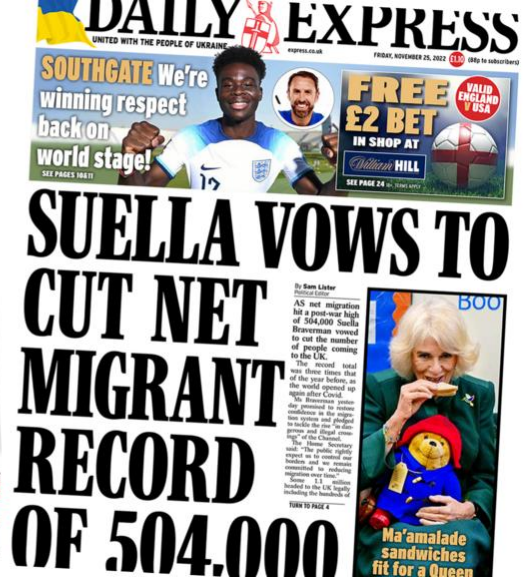
- HE International student load grew from 253k in 2010 to 395k in 2019 (*Dept Ed*)
- International student fee revenue grew \$3.88b (2010) to \$9.98b (2019) (*Dept Ed*)
- Globally mobile students grew from 3.8m (2019) to 6.1m in 2019 (*UNESCO UIS Data*)



Feb 2022 - Australian Borders Reopened

- Pent up demand → double boom (2023 +40% and 2024 + 10%)
- The Australian HE sector remained engaged – online, Study Centres, TNE
- Work right settings (relaxed work limits) → Reduced retention rates
- Jobs and Skills Summit in September 2022 → Extended PSW

Canada, US and UK → Recovered at a quicker rate due to more controlled entry for international students during COVID



Coalition pledges to cut international student numbers to tackle housing crisis | ABC NEWS

[Watch >](#)

Demand Era to Managed Era - Big 4

Australia

- Ministerial Direction (MD) 107 → MD 111 → MD 115
- National Planning Levels: NOSC allocations and exemptions
- Increase visa fees (2023: \$750, July 2024: \$1,600 & July 2025: \$2,000)
- 2025 ELA Bill – Oversight of education agent (definition & payment transparency, onshore commissions, TEQSA TNE oversight)
- Increased English requirements, financial requirements & Genuine Student assessments
- Increase PSW fee March 2026 (\$2,300 to \$4,600)

UK

- Ban on dependants, PSW reduced from 24 to 18 months
- The UK's International Education Strategy 2026 – reduce net migration, increase TNE and introduce government levy on international student fees, Basic Compliance Assessment (BCA) to be able to recruit international students:
 - ✓ a visa refusal rate of less than 10%
 - ✓ a course enrolment rate of at least 90% and
 - ✓ a course completion rate of at least 85%
- Commencements from India (-12%), China (-5%), and Nigeria (-33%)

Canada

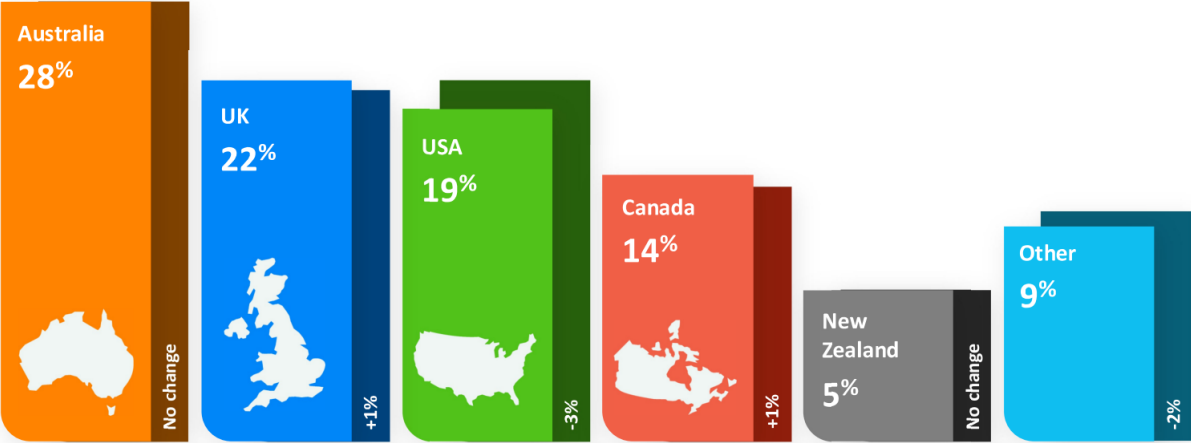
- Hard cap allocated by Provinces (who then decided which providers to allocate to).
- New international study visas issued dropped by nearly 90% per cent - 456,690 in 2023 to 50,370 by September 2025 – approx. 9,000 job losses (Cap: 255,360)
- Caps out to 2028

USA

- Full or partial visa suspensions affecting up to 39 countries
- Stricter visa screening and approvals – social media screening, delay in visa interviews, increased rejection rates, tougher pathways to H-1B work visas, visa revocations
- Student visa issuances fell by 36% in summer 2025

The UK & Canada have marginally increased in first-choice preference

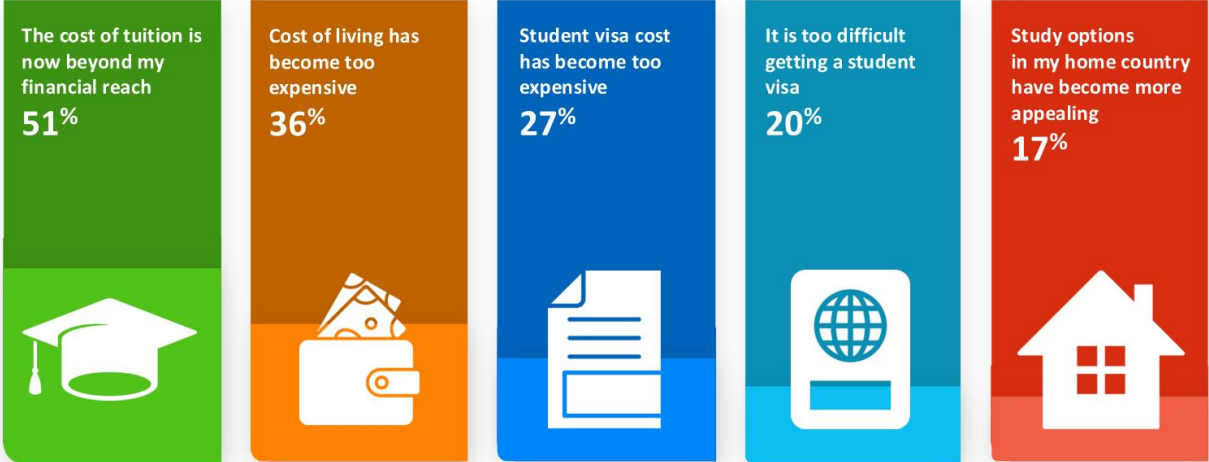
Meanwhile, the US continues to decline, falling to third place



Emerging Futures 8 (August 2025) compared with Emerging Futures 7 (February 2025)
 Question: From the list of countries below, please rank your top four (4) study destinations, rank 1 being your first choice to study*. You may rank the countries by typing in 1 to 4 in the box, with rank 1 being your first-choice destination.

Decliners – why are you no longer studying internationally?

Financial constraints are the main reason for no longer pursuing international studies



Question: Which among the following reasons explain why you are no longer pursuing your international studies? Please choose up to three reasons most applicable to you. (n=344; includes only respondents who indicated they are no longer pursuing international studies)

Student Demand – IDP Emerging Futures 8 August 2025

Asia is consolidating as the leading destination region
With more than 20,000 English-taught programmes, China, Japan, Malaysia, and India are attracting both regional and international students at scale.

MENA is investing heavily to compete
The UAE and Saudi Arabia are pouring resources into scholarships, branch campuses, and flexible learning models that students actually want.

Second-tier cities are gaining ground
Students are looking beyond capitals to cities like Udipi, Ho Chi Minh City, and Jeddah for affordability and specialised programmes.

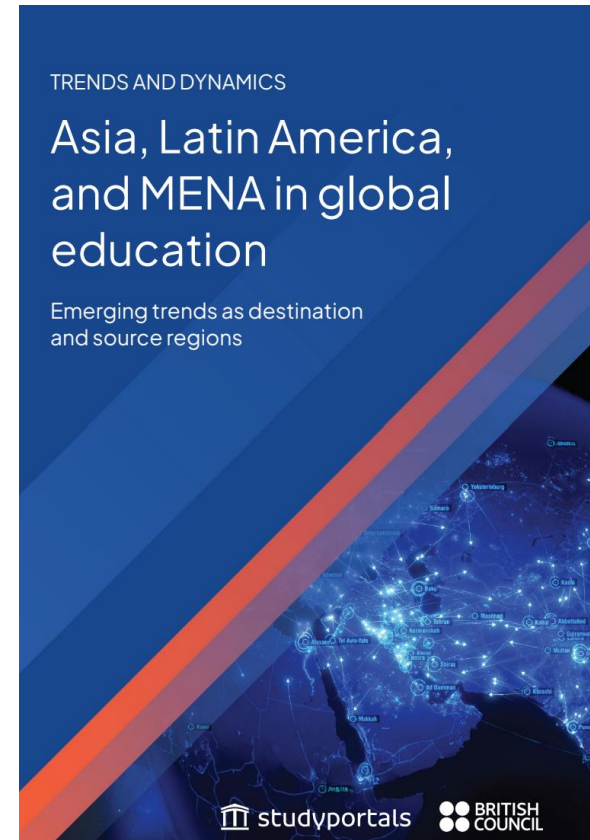
Transnational education is reshaping where students can study
Asia leads globally in TNE institutions and student demand. MENA is catching up fast. Latin America's TNE footprint is shrinking.

Students want specific skills, not generic degrees
Computer Science, Data & AI, and specialised Business fields are oversubscribed. Generic Engineering and Business programmes risk being oversaturated.

TRENDS AND DYNAMICS

Asia, Latin America, and MENA in global education

Emerging trends as destination and source regions



studyportals BRITISH COUNCIL

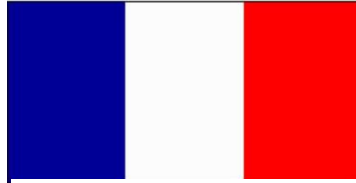
Study Portals – British Council

October 2025

Big 4 to Big 14



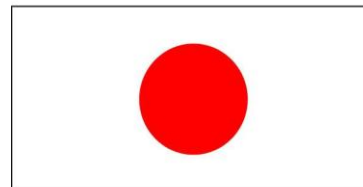
402,000 international students (2024/25)
Record high - 8% Growth



443,500 international students (2024/25)
3% growth



300,000+ international students reached in
2025 (ahead of target)



180,000 new students
+8.2% growth



139,000 international students (growth
target 250,000)

DHA Feb Data

Feb Visa Refusal Rate: 32.5% (highest for a single month in 20 years)

- India: 40% refusals
- Nepal: 60% refusals
- Bangladesh: 47% refusals
- China: 3%
- PG Research: 2024/25: 98.3% vs Feb 2026: 96.9%

Visas Lodged:

Feb 2026: 153,991 vs 2024/25: 228,906 (-32.7%)

PG Research

Feb 2026: 7,578 vs 2024/25: 7,578 (-21.8%)

China Feb 2026: 2,204 vs 2024/25: 3029 (-27%)

Trending [Melania Trump Epstein](#) [Insurance cancer treatme](#)

Australia begins crackdown on Indian visas in 2026: Four in ten students rejected

TOI World Desk / TIMESOFINDIA.COM / Apr 11, 2026, 11:48 IST



Australia's International Education & Skills Strategic Framework

Op-Ed | 19 March 2026



'Continuity and change': the year ahead for international education in Australia

The Hon Julian Hill MP

Assistant Minister for International Education

Assistant Minister for Citizenship, Customs and Multicultural Affairs



Australian Government

Australia's International Education and Skills Strategic Framework

Draft for Consultation

Objective 1: A Sector Built on Quality and Integrity

Objective 2: A Managed System to Deliver Sustainable Growth Over Time

Objective 3: Taking Australian Education and Training to the World

Objective 4: Boosting Skills and Productivity



Observations
