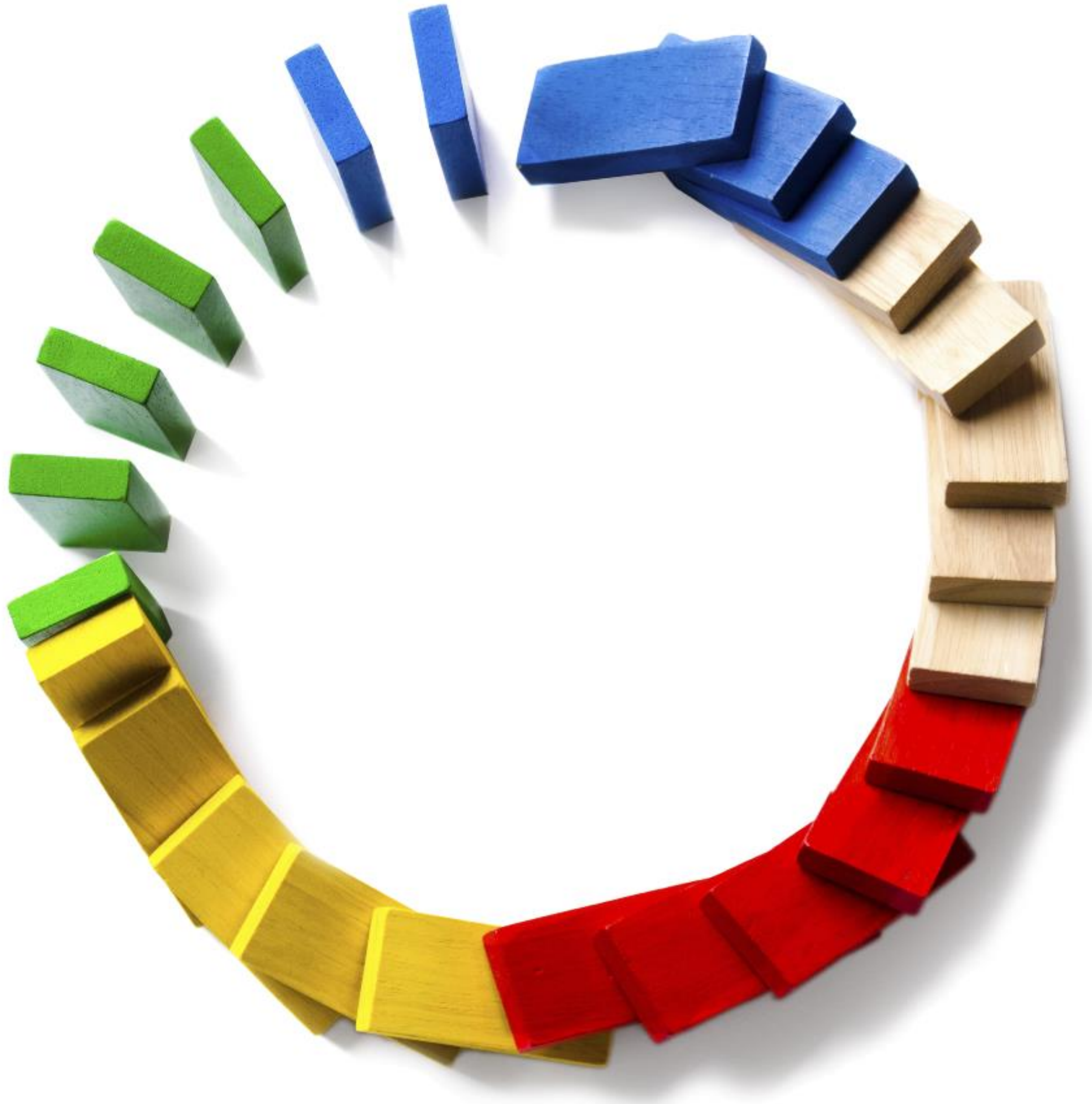
Deloitte.



# Understanding the impact of COVID-19 on International Education: Trends in International Education and Training

## Selected source market factsheets

Prepared for the Department of Education, Skills and Employment

August 2021

Deloitte Access Economics

*This factsheet has been prepared by Deloitte Access Economics for the Australian Government Department of Education, Skills and Employment to understand the impact of COVID-19 on international education in Australia. The underlying methodology and analysis is detailed in a report to the Department. Unless otherwise noted, data as at April 2021.*

# Vietnam Trends in international education and training, 2021

Vietnam's rapid economic development has encouraged a growing middle class of international education consumers, representing 4% of all enrolments in Australian international education in April 2021. While deferral rates from Vietnamese students are three times greater than 2019 levels, lower cancellation rates and an increase in students enrolled outside Australia suggests demand is relatively resilient.

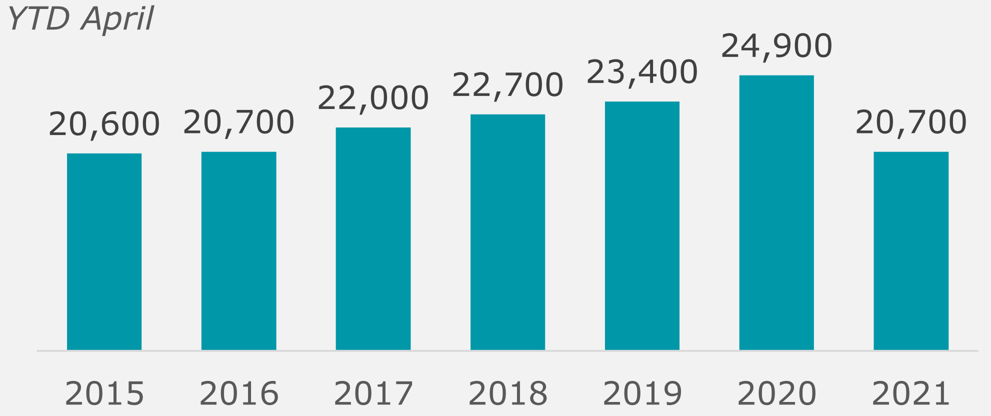
## 1 | Market size and growth trend

A relatively mature market, Vietnam's growth as a source market has been moderate up until 2020, although Australia is receiving a declining share of all Vietnamese outbound students - from 22% in 2014 to 15% in 2018.

**4%** **Outbound mobility ratio**
4 of every 100 Vietnamese tertiary students were studying abroad in 2018

**15%** **of Vietnamese outbound students studied in Australia**
16,000 of the 110,000 Vietnamese outbound tertiary students studied in Australia in 2018

Enrolments with Australian providers from Vietnamese students
*YTD April*




**4th** **largest market for Australia**
20,700 students inbound to Australia across all subsectors in 2021

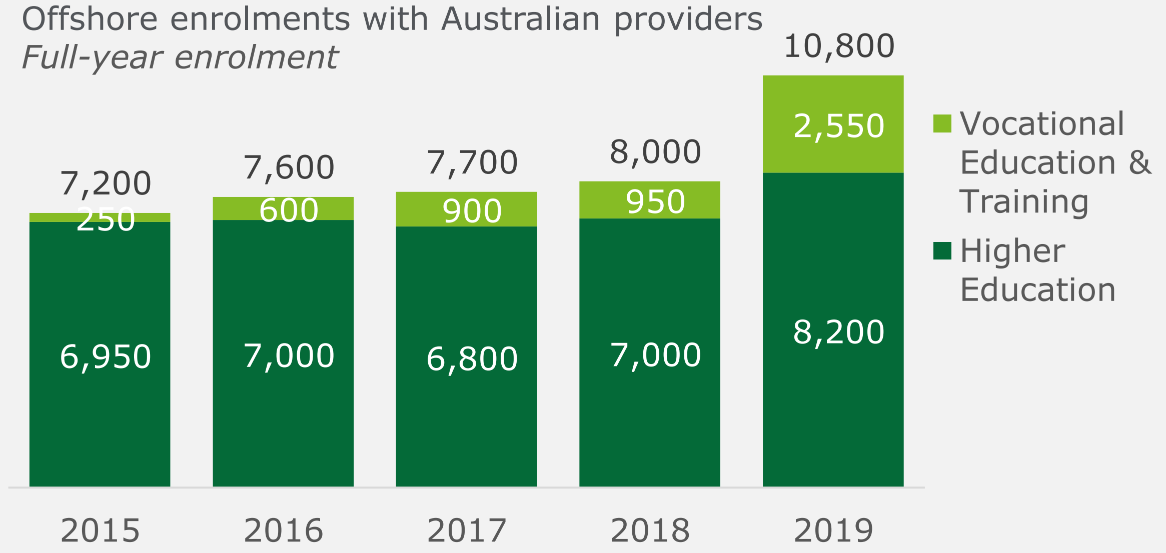
Source: UNESCO UIS International mobility data (as at 2018)

Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 10,800 students in Vietnam were enrolled in tertiary study with Australian providers. 92% of the 8,200 higher education enrolments were face-to-face.

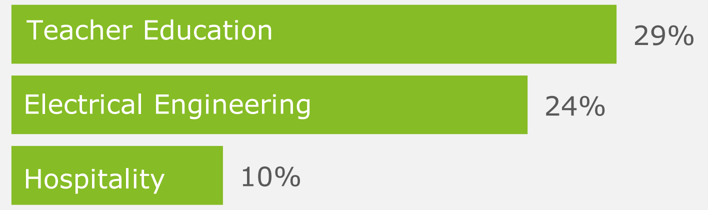
Offshore enrolments with Australian providers
*Full-year enrolment*




Note: 'Offshore' students are those residing overseas for the term or semester.

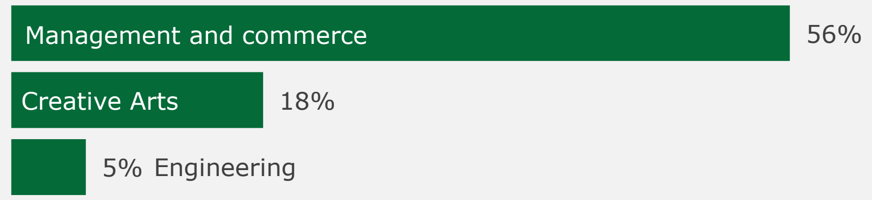
**2nd** **Largest market for VET offshore**
2,500 enrolments with 7 Australian Registered Training Organisations in 2019

Top 3 fields for offshore VET (% enrolments)




**4th** **Largest market for Higher Education offshore**
8,200 enrolments with 31 Australian higher education providers in 2019

Top 3 fields for offshore higher education (% enrolments)

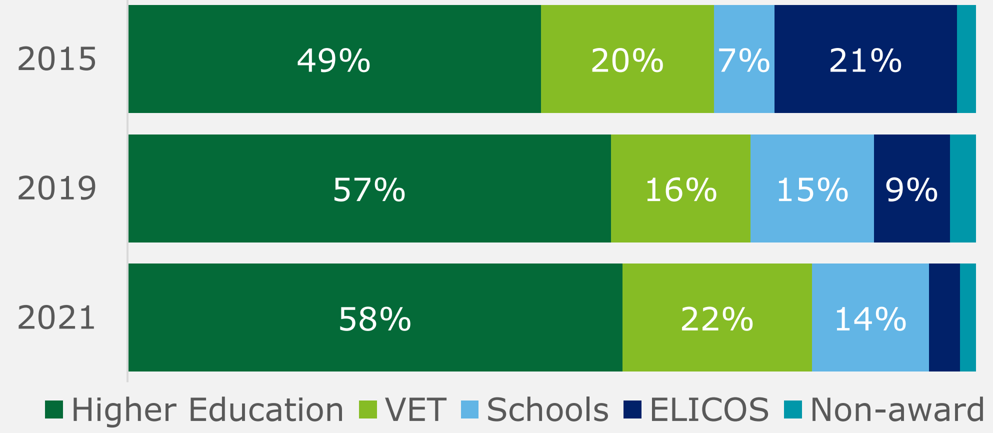



Source: Department of Education, Skills and Employment, NCVER (2019) Note: Data rounded to nearest 50 enrolments. Subtotals may not sum to totals due to rounding.

## 2 | Student characteristics

Enrolments from Vietnamese students are concentrated in tertiary programs (73% of enrolments in 2019). Vietnam is the second largest source market for international enrolments in Australian schooling.

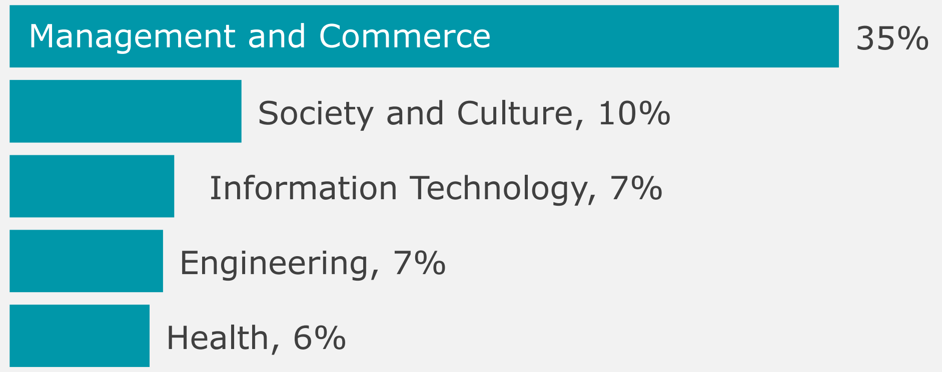
Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Decline in ELICOS:** -1,300 enrolments in 2021 vs 2019
- **Growth in VET:** +700 enrolments in 2021 vs 2019
- **Fields of education** undertaken by Vietnamese students in Australia are similar to those taken by all Vietnamese students in their home country

*Top 5 fields of education (% enrolments)*
*YTD April 2021*




### Spending and employment

**$68** **spend per night on living costs by Vietnamese students in Australia**
Below the $89 average among all international students (2020)

**$80** **spend per day on education fees by Vietnamese students in Australia**
Below the $84 average spent on education among all international students (2020)

**42%** **share of students studying while working**
Below the 52% average for all international students employed in Australia while completing study (2016)

### Graduate outcomes

**88%** **employment rate for Vietnamese graduates looking for work in Australia**
Above the 86% average for all international graduates (2013-18)

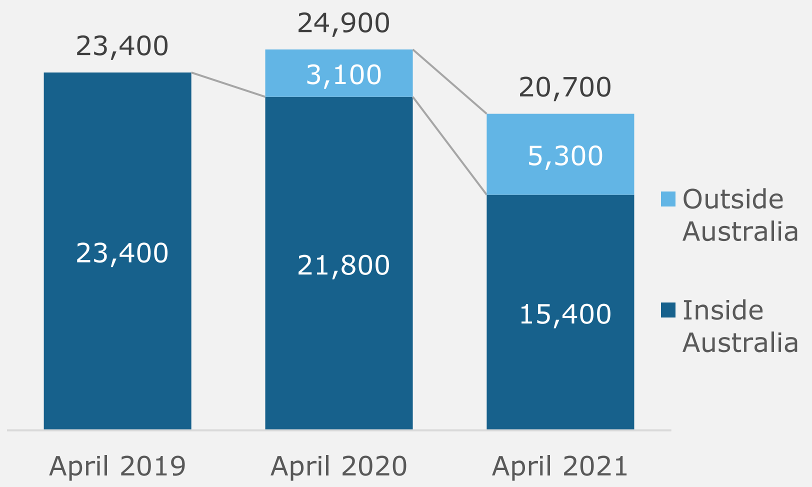
**97%** **employment rate for Vietnamese graduates looking for work in Vietnam**
Above the 93% average among all international graduates looking for work in their home countries (2013-18)

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

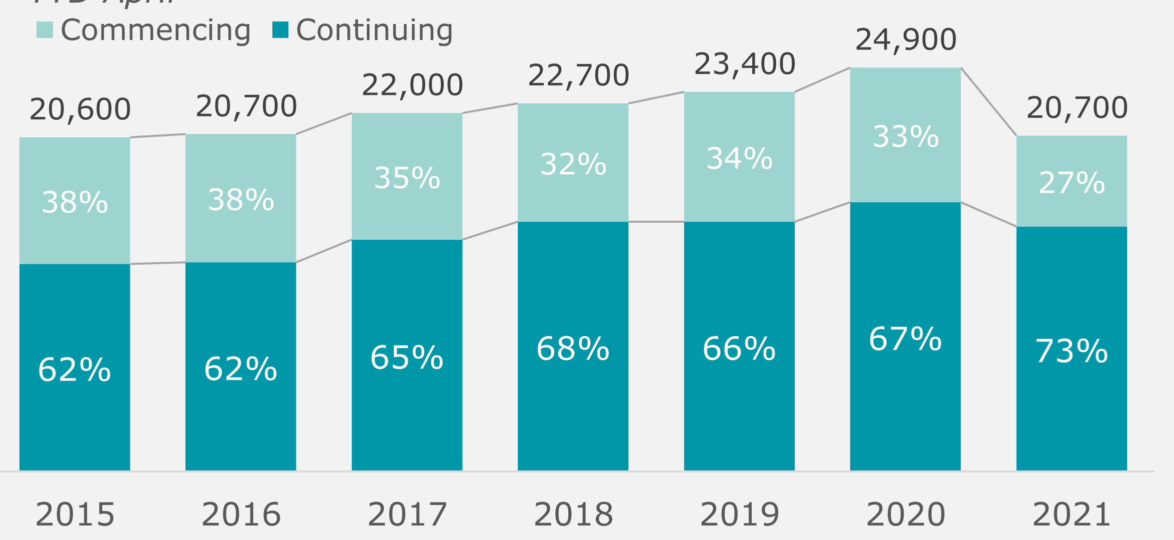
## 4 | Student flows across 2020 and 2021

One in four Vietnamese student visa holders remain outside Australia. As at April 2021, commencements had fallen by 2,700 compared to 2020 (a reduction equivalent to 11% of 2020 enrolments).

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**26%** **of student visa holders outside Australia**
26% in August 2021, up from 13% in August 2020

**-6,200** **Student visa applications in 2020-21 compared to 2018-19 levels**
2020-21 applications represent **54% of 2018-19 levels**

**-2,700** **new student commencements compared to 2020**
In 2021, 5,600 commencements represent **67% of 2020 levels**

**2021 deferrals more than double 2019 levels**

**170%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 5% of April 2019 enrolments (compared to 2% of enrolments in April 2019)

**Cancellations have returned to 2019 levels**

**21%** increase in cancellations from April 2019 to April 2020

In April 2021, cancellation levels equated to 11% of April 2019 enrolments (on par with a cancellation level of 11% in 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees'*, *'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

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# China Trends in international education and training, 2021

China is the largest source market for Australia – and the largest source market for its key competitors – with 14% of all Chinese outbound tertiary students enrolled in Australian education in 2018. As the first students to face border controls, Chinese student deferrals increased significantly, however cancellations have remained relatively low as a share of total enrolments, and a high proportion of students studying outside Australia (64% in August 2021) has moderated the total decline in enrolments.

## 1 | Market size and growth trend

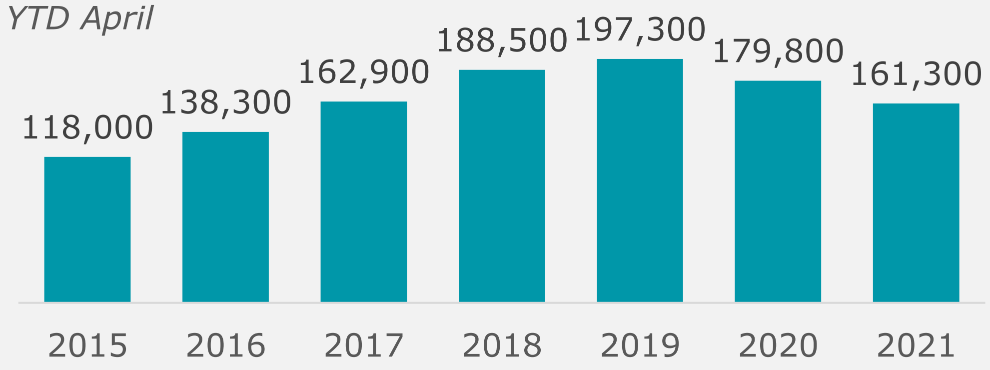
International education enrolments from China grew steadily in the 5 years to 2019, with Australia receiving an increasing share of all Chinese outbound students - from 12% in 2014 to 14% in 2018. Current enrolments are similar to 2017 levels.

**2%** **Outbound mobility ratio**
2 of every 100 Chinese tertiary students were studying abroad in 2018

**14%** **of Chinese outbound students studied in Australia**
143,000 of the one million Chinese outbound tertiary students studied in Australia in 2018

Source: UNESCO UIS International mobility data (as at 2018)

Enrolments with Australian providers from Chinese students
*YTD April*



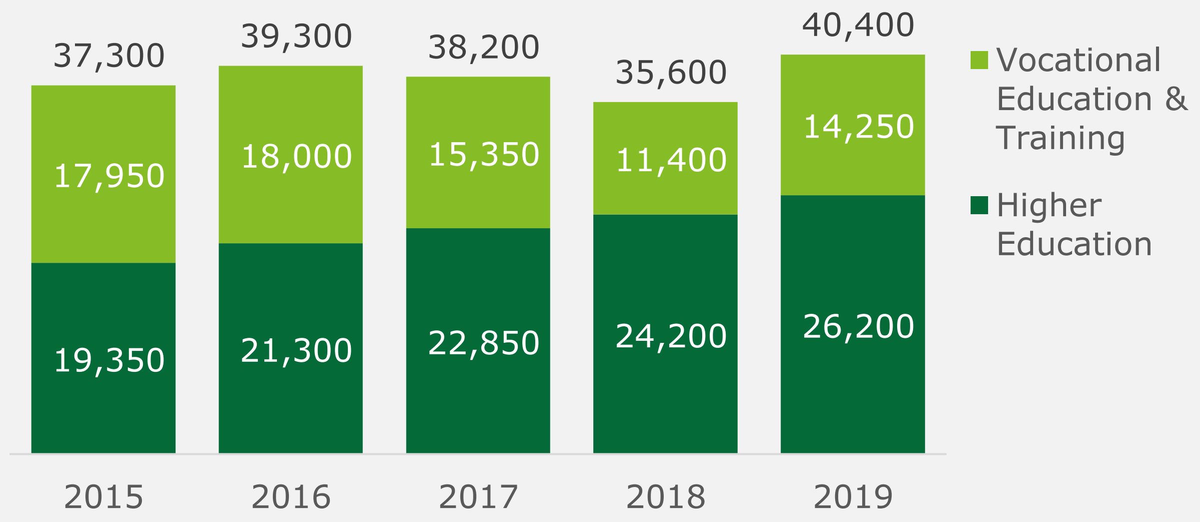

**1st** **largest market for Australia**
161,300 students inbound to Australia across all subsectors in 2021

Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 40,400 students in China were enrolled in tertiary study with Australian providers. 88% of the 26,200 higher education enrolments were face-to-face.

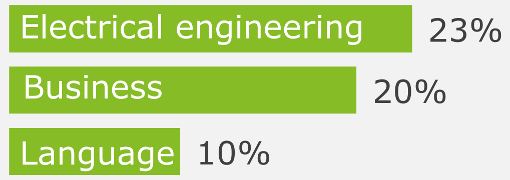
Offshore enrolments with Australian providers
*Full-year enrolment*




Note: 'Offshore' students are those residing overseas for the term or semester.

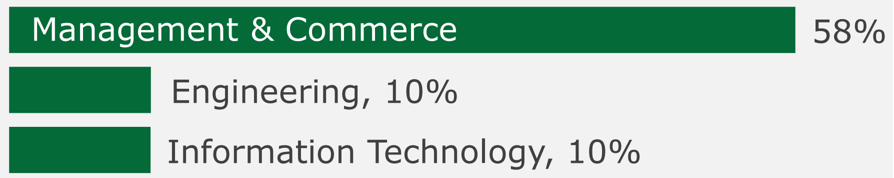
**1st** **Largest market for VET offshore**
14,250 enrolments with 17 Australian Registered Training Organisations in 2019

Top 3 fields for offshore VET (% enrolments)




**1st** **Largest market for Higher Education offshore**
26,400 enrolments with 55 Australian higher education providers in 2019

Top 3 fields for offshore higher education (% enrolments)

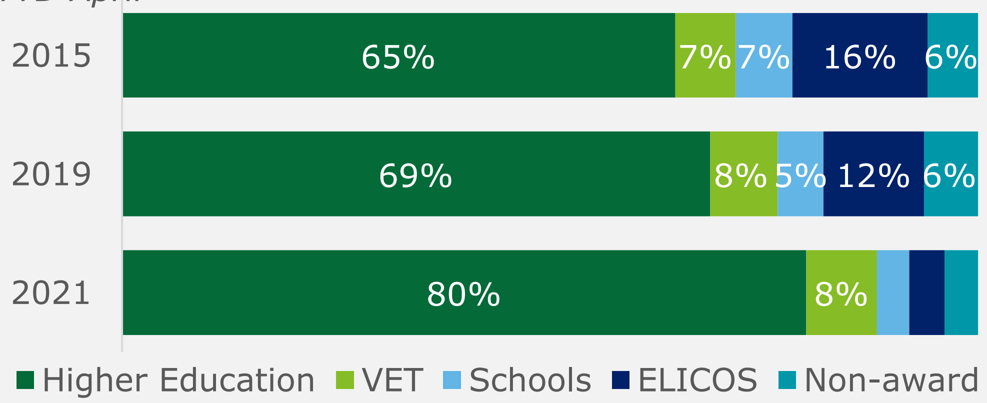



Source: Department of Education, Skills and Employment, NCVER (2019) Note: Data rounded to nearest 50 enrolments. Subtotals may not sum to totals due to rounding.

## 2 | Student characteristics

The vast majority (80%) of students are enrolled in higher education, concentrated in management and commerce studies, while ELICOS enrolments declined significantly in 2021.

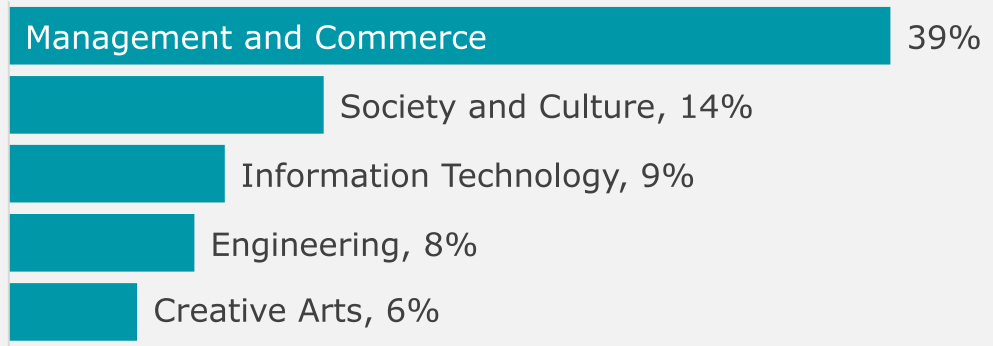
Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Increase in proportion of enrolment in higher education:** despite a decline in the volume of HE enrolments (-6,600 enrolments 2019 to 2021)
- **Decline in ELICOS:** -16,400 enrolments in 2021 vs 2019

Top 5 fields of education (% enrolments)
*YTD April 2021*




### Spending and employment

**$112** **spend per night on living costs by Chinese students in Australia**
Above the $89 average among all international students (2020)

**$103** **spend per day on education fees by Chinese students in Australia**
Above the $84 average spent on education among all international students (2020)

**12%** **share of students studying while working**
Below the 52% average for all international students employed in Australia while completing study (2016)

### Graduate outcomes

**87%** **employment rate for Chinese graduates looking for work in Australia**
Above the 86% average for all international graduates (2013-18)

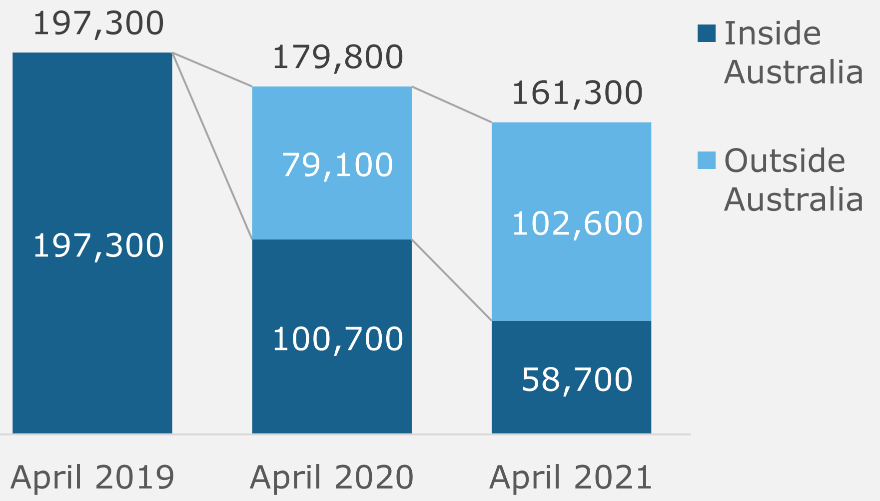
**90%** **employment rate for Chinese graduates looking for work in China**
Below the 93% average among all international graduates looking for work in their home countries (2013-18)

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

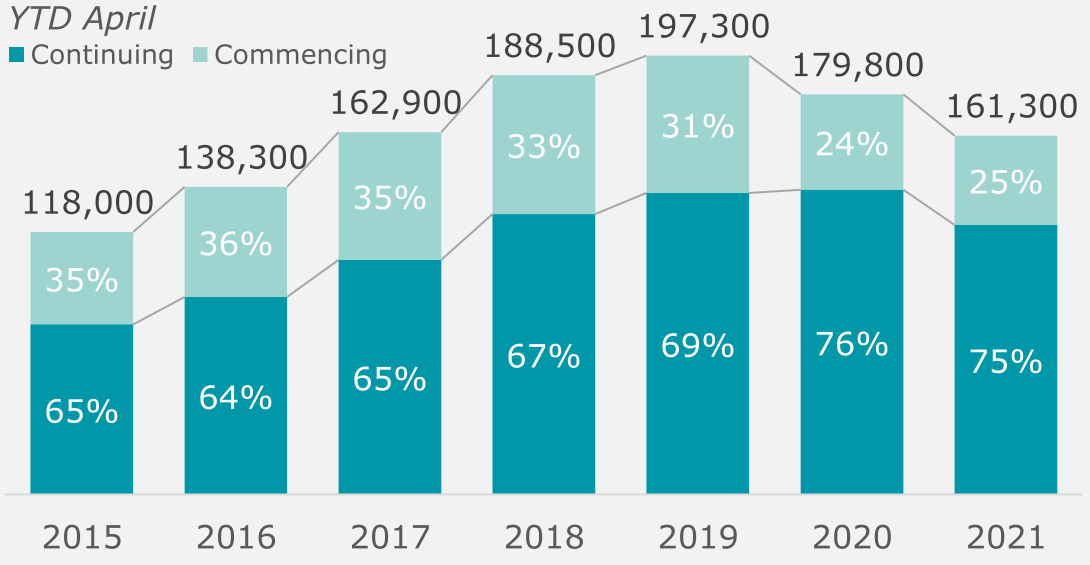
## 4 | Student flows across 2020 and 2021

Reflecting the earlier timing of Australia's border closure to China, almost two-thirds (64%) of student visa holders from China remain outside Australia. As at April 2021, commencements had fallen by 2,800 compared to 2020 (a reduction equivalent to 1.5% of 2020 enrolments).

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**64%** **of student visa holders outside Australia**
64% in August 2021, up from 44% in August 2020

**-39,200** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **57% of 2018-19 levels**

**-2,800** **new student commencements compared to 2020**
In 2021, 40,100 commencements represent **93% of 2020 levels**

**Significant deferral activity in 2020 now moderating**

**1443%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 3% of April 2019 enrolments (compared to 1% of enrolments in April 2019 and 18% in April 2020).

**Cancellations remain below 2019 levels**

**12%** increase in cancellations from April 2019 to April 2020

In April 2021, cancellation levels equated to 7% of April 2019 enrolments (compared to 10% of enrolments in April 2019).

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees', 'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

# India Trends in international education and training, 2021

The second-largest source market for Australia and its key competitors, 20% of all Indian outbound tertiary students enrolled in Australian education in 2018. While deferral levels remain high, lower cancellation rates, a relatively stable commencements rate and a relatively small decline in visa applications (compared to 2020) suggests positive intent among students to continue their studies with Australian providers.

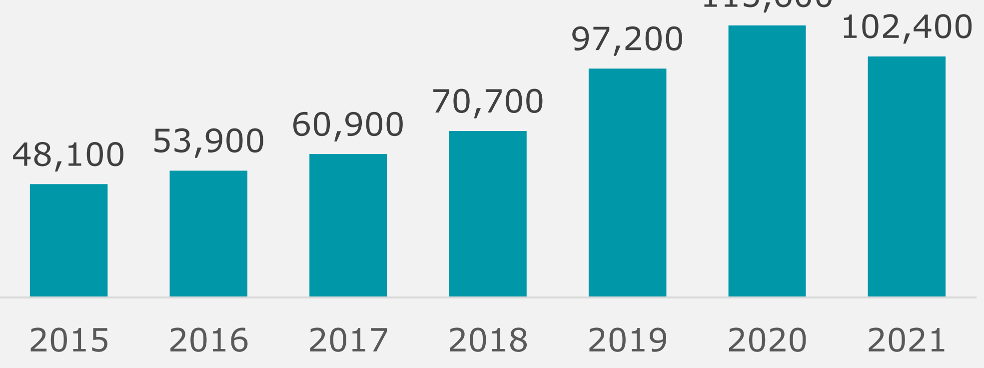
## 1 | Market size and growth trend

From 2015 to 2020, the intake of international students from Australia more than doubled – reflecting both an increase in outbound mobility and Australia's increasing share of the market, from 12% in 2014 to 20% in 2018.

**1%** **Outbound mobility ratio**
1 of every 100 Indian tertiary students were studying abroad in 2018

**20%** **of Indian outbound students studied in Australia**
73,300 of the 375,000 Indian outbound tertiary students studied in Australia in 2018

Enrolments with Australian providers from Indian students
*YTD April*




**2nd** **largest market for Australia**
102,400 students inbound to Australia across all subsectors in 2021

Source: UNESCO UIS International mobility data (as at 2018)

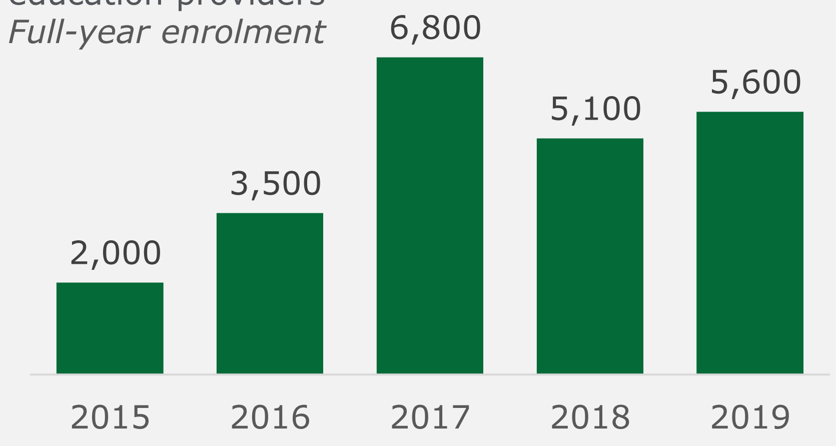
Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 5,600 students in India were enrolled in tertiary study with Australian providers. 87% of the 5,600 higher education enrolments were face-to-face.

**4%** **of all enrolments from India are from students outside Australia**
Based on full year 2019 enrolment levels

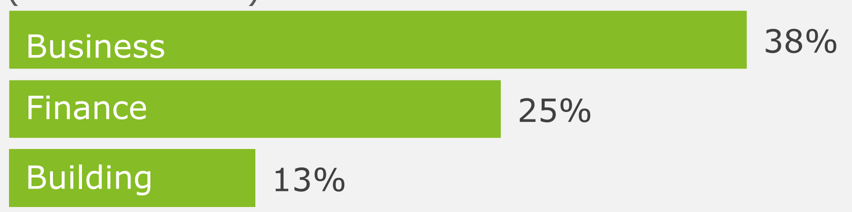
Offshore enrolments with Australian higher education providers
*Full-year enrolment*




Notes: VET enrolments range from 30 to 85 (2015-19) and are not shown. 'Offshore' students are those residing overseas for the term or semester.

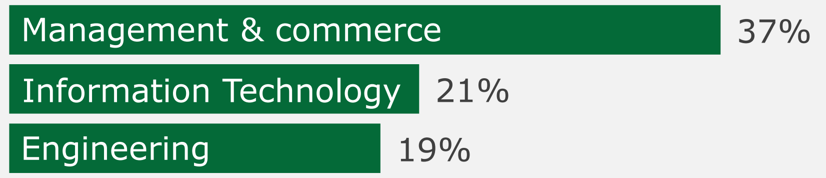
**30th** **Largest market for VET offshore**
50 enrolments with 6 Australian Registered Training Organisations in 2019

Top 3 fields for offshore VET
(% enrolments)




**5th** **Largest market for Higher Education offshore**
5,600 enrolments with 59 Australian higher education providers in 2019

Top 3 fields for offshore higher education
(% enrolments)

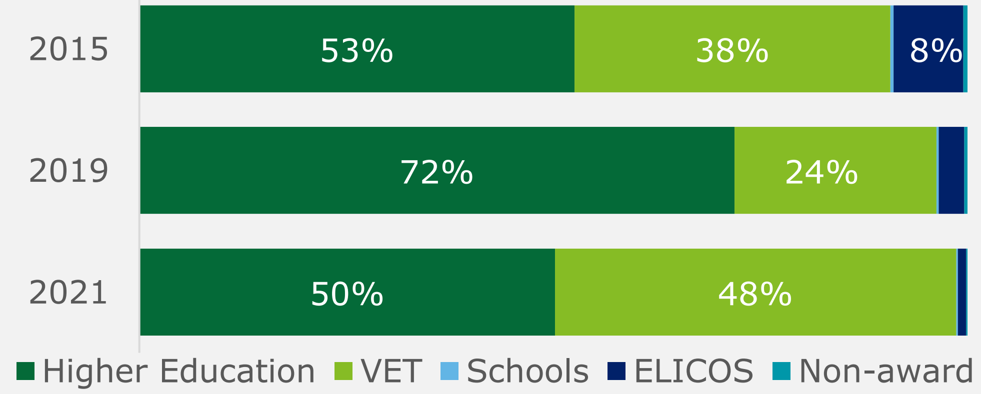



Source: Department of Education, Skills and Employment, NCVER (2019) Note: Higher education data rounded to nearest 50 enrolments, VET data rounded to nearest 5 enrolments. Subtotals may not sum to totals due to rounding.

## 2 | Student characteristics

Enrolments from Indian students are concentrated in tertiary programs (86% of enrolments in 2019). The proportion of students enrolled in VET in 2021 has overtaken higher education, reflecting both growth in VET enrolments (+25,900 on 2019) and a decline in higher education enrolments (-18,400 on 2019).

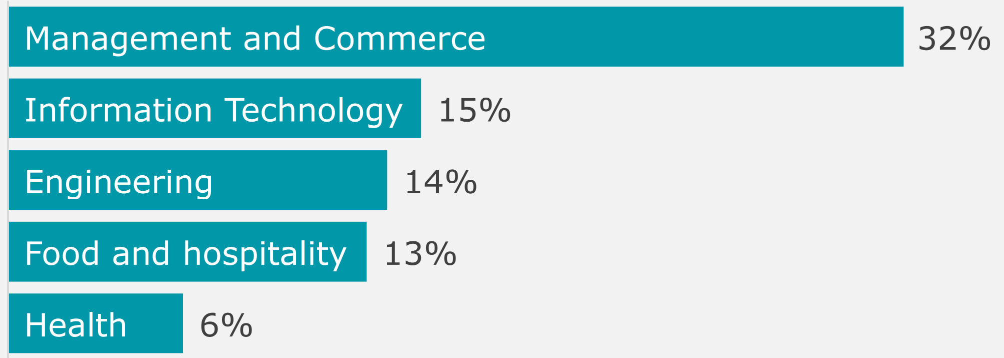
Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Decline in ELICOS** -2,000 enrolments in 2021 vs 2019
- **Strong growth in VET** +26,000 enrolments in 2021 vs 2019
- **Decline in higher education** -18,400 2021 vs 2019

Top 5 fields of education (% enrolments)
*YTD April 2021*




### Spending and employment

**$58** **spend per night on living costs by Indian students in Australia**
Below the $89 average among all international students (2020)

**$80** **spend per day on education fees by Indian students in Australia**
Below the $84 average spent on education among all international students (2020)

**65%** **share of students studying while working**
Above the 52% average for all international students employed in Australia while completing study (2016)

### Graduate outcomes

**78%** **employment rate for Indian graduates looking for work in Australia**
Below the 86% average for all international graduates (2013-18)

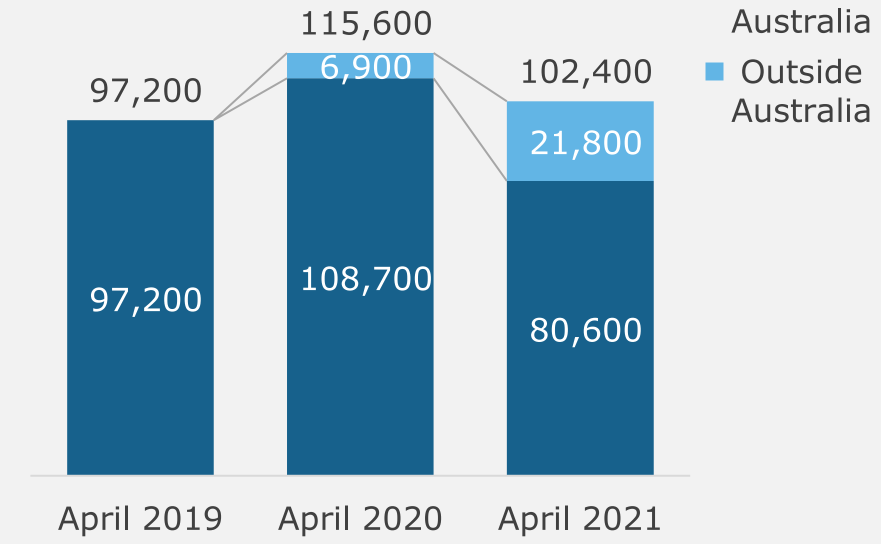
**80%** **employment rate for Indian graduates looking for work in India**
Below the 93% average among all international graduates looking for work in their home countries (2013-18)

Source: Department of Education, Skills and Employment (as at April 2021) Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

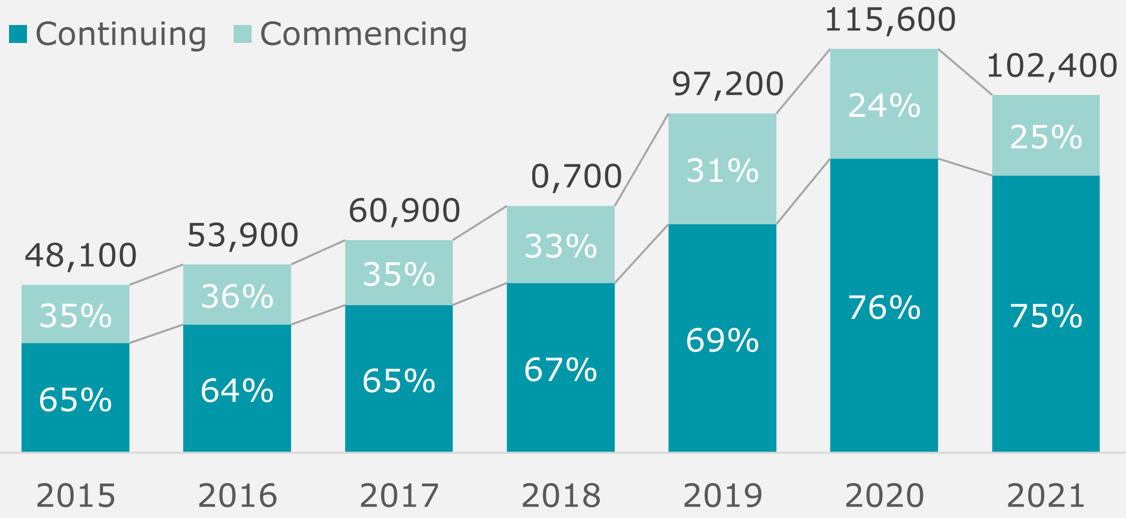
## 4 | Student flows across 2020 and 2021

One in five (21%) Indian student visa holders remain outside Australia. As at April 2021, commencements had fallen by 8,400 compared to 2020 (a reduction equivalent to 7% of 2020 enrolments).

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**21%** **of student visa holders outside Australia**
21% in August 2021, up from 6% in August 2020

**-28,300** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **69% of 2018-19 levels**

**-8,400** **new student commencements compared to 2020**
In 2021, 23,000 commencements represent **73% of 2020 levels**

### 2021 deferrals three times greater than 2019 levels

**68%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 6% of total enrolments (compared to 2% of enrolments in April 2019)

### Cancellations in line with 2019 levels

**13%** fewer cancellations from April 2019 to April 2020.

In April 2021, cancellation levels equated to 19% of April 2019 enrolments (compared to 21% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees', 'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

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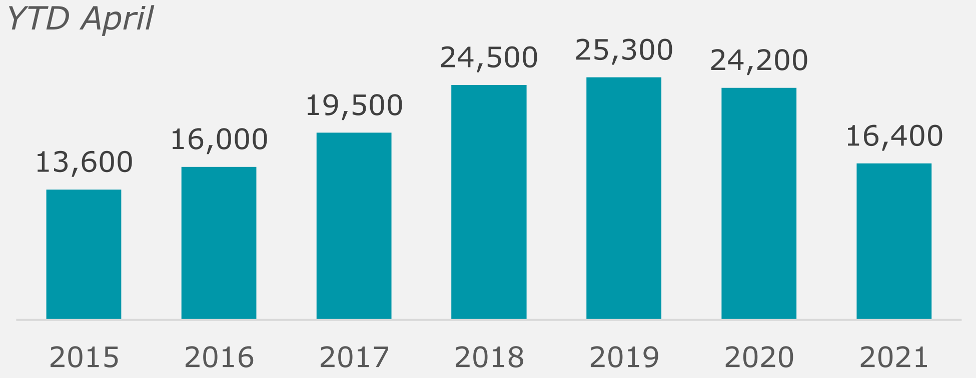
# Brazil Trends in international education and training, 2021

Growing demand for vocational education by Brazilian students has contributed to Australia's share of international enrolments from Brazil rising from 2% to 11% over four-years. Ongoing disruptions have seen a large reduction in enrolments in 2021, especially for ELICOS.

## 1 | Market size and growth trend

Australia has experienced major growth in demand from Brazil, and is receiving a rising share of the country's outbound students – 11% in 2018, up from only 2% in 2014. Reflecting severe COVID-19 disruptions, 2021 enrolment have fallen significantly, returning to 2016 levels.

Enrolments with Australian providers from Brazilian students
*YTD April*




**0.8%** **Outbound mobility ratio**
0.8 of every 100 Brazilian tertiary students were studying abroad in 2018

**11%** **of Brazilian outbound students studied in Australia**
7,600 of the 67,000 Brazilian outbound tertiary students studied in Australia in 2018

**6th** **largest market for Australia**
16,400 students inbound to Australia across all subsectors in 2021

Source: UNESCO UIS International mobility data (as at 2018)

Source: Department of Education, Skills and Employment (as at April 2021)

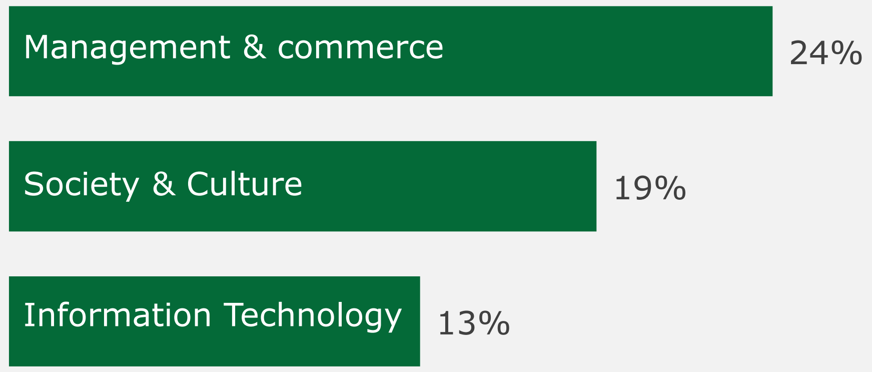
## 3 | Transnational education delivery

Offshore delivery in Brazil is small and limited to higher education (with no vocational education enrolments). In 2019, 82 students in Brazil were enrolled in offshore study with Australian higher education providers. 84% of the enrolments were face-to-face.

**0.3%** **of all enrolments from Brazilian students (at Australian providers) study outside Australia**
Based on full year 2019 enrolment levels
Offshore enrolments ranged from 190 to 82 enrolments across 2015 to 2019.

**51st** **largest market for Higher Education offshore**
82 enrolments across 35 Australian higher education providers in 2019

Top 3 fields for offshore higher education (% enrolments)



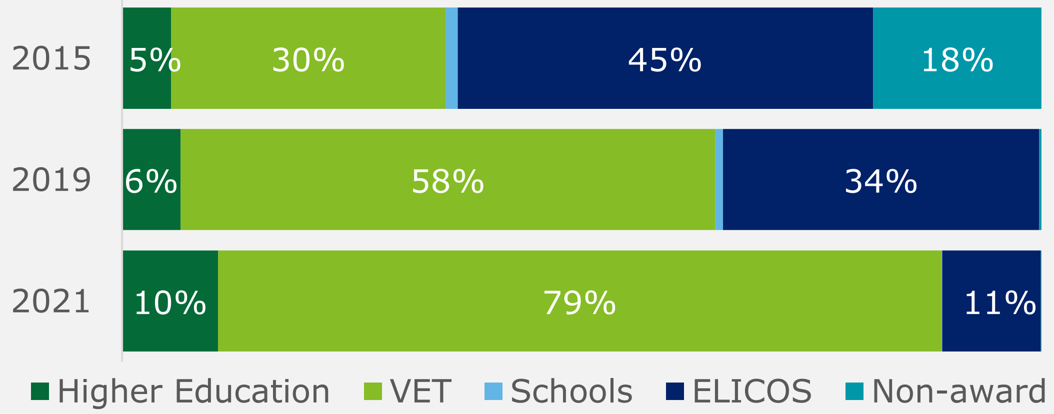

Note: VET enrolments range from 30 to 85 (2015-19) and are not shown. 'Offshore' students are those residing overseas for the term or semester.

Source: Department of Education, Skills and Employment, NCVER (2019).

## 2 | Student characteristics

Enrolments from Brazilian students are concentrated in VET courses (58% of enrolments in 2019). ELICOS delivery has been severely impacted by ongoing disruptions, with 2021 enrolments at 20% of 2019 levels.

Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Resilient demand for tertiary study:** Enrolments in higher education and VET fell in 2020 by 6% and 13% respectively – a moderate reduction compared to the 80% decline in demand for ELICOS.
- **Consistent levels of enrolment in Higher Education:** 2021 enrolments +1,000 on 2015 levels.
- **Fields of education** undertaken by Brazilian students in Australia are similar to those taken by all Brazilian students in their home country.

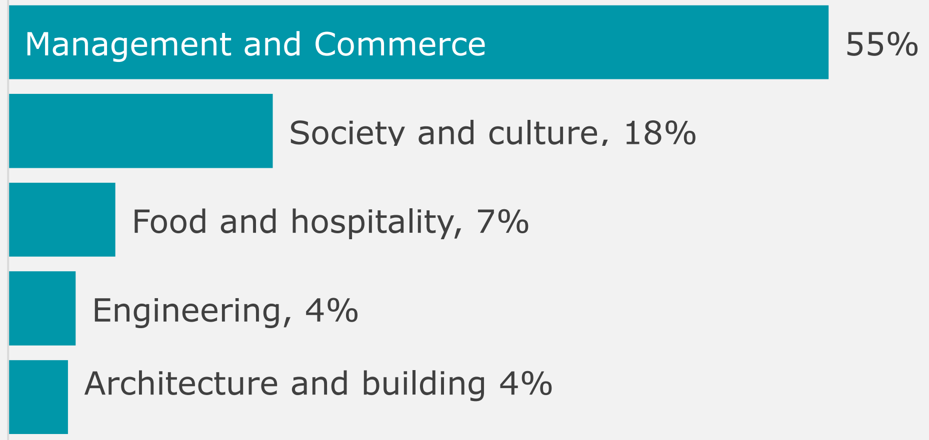
### Spending and employment

**$77** **spend per night on living costs by Brazilian students in Australia**
Below the $89 average among all international students (2020)

**$24** **spend per day on education fees by Brazilian students in Australia**
Below the $84 average spent on education among all international students (2020)

**68%** **share of students studying while working**
Above the 52% average for all international students employed in Australia while completing study (2016)

Top 5 fields of education (% enrolments)
*YTD April 2021*



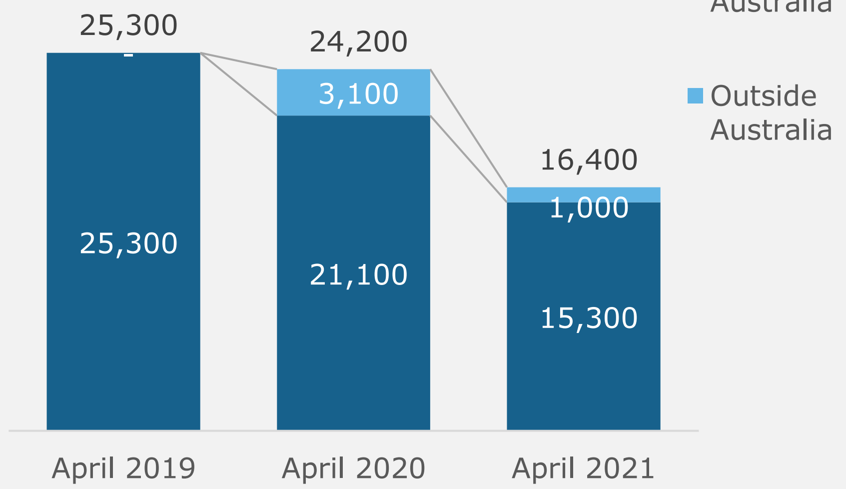

Note: Graduate outcomes data are unavailable.

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016), UNESCO UIS International mobility data (as at 2018)

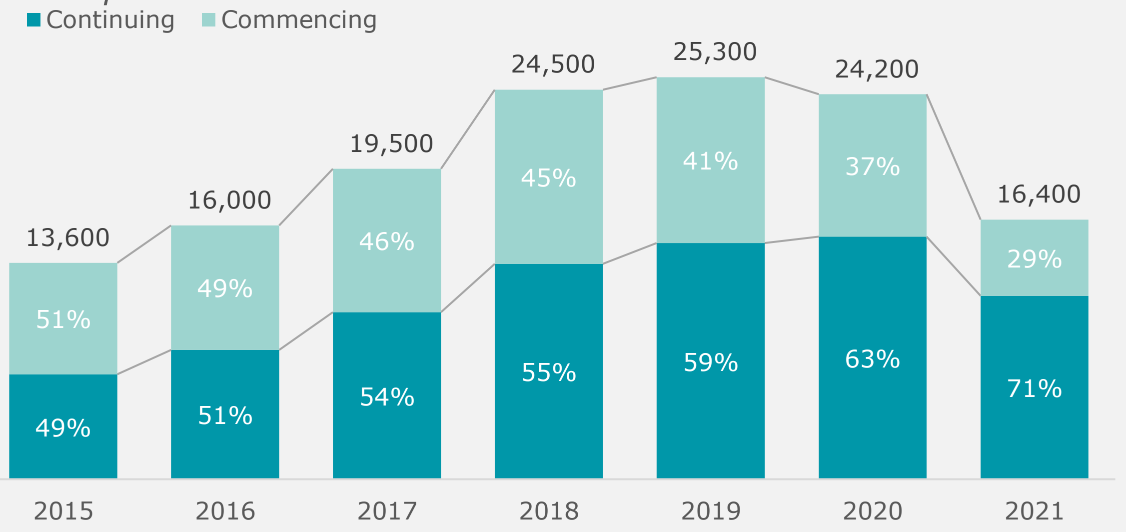
## 4 | Student flows across 2020 and 2021

Reflecting significant COVID-19 disruptions in Brazil, cancellation rates for Brazilian students increased in 2021. The number of students enrolled in 2021 fell by 7,800 (April 2021), with very few students continuing their study from outside Australia – 6% in August 2021 compared to 22% for all markets.

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**6%** **of student visa holders outside Australia**
6% in August 2021, down from 13% in August 2020

**-13,300** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **36% of 2018-19 levels**

**-4,200** **new student commencements compared to 2020**
In 2021, 4,800 commencements represent **53% of 2020 levels**

**Deferrals returning to 2019 levels**

**61%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 3% of April 2019 enrolments (on par with a deferral level of 3% of enrolments in April 2019)

**2021 cancellations below 2019 levels**

**26%** increase in cancellations from April 2019 to April 2020

In April 2021, cancellation levels equated to 7% of April 2019 enrolments (compared to 9% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees'*, *'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

# Colombia Trends in international education and training, 2021

Colombia's economic development has strengthened demand for international education, with Australia's market share of outbound Colombian tertiary students more than doubling since 2014, driven by growth in VET enrolments. Ongoing COVID-19 disruptions to international mobility have resulted in very high cancellations and low retention of students studying outside of Australia.

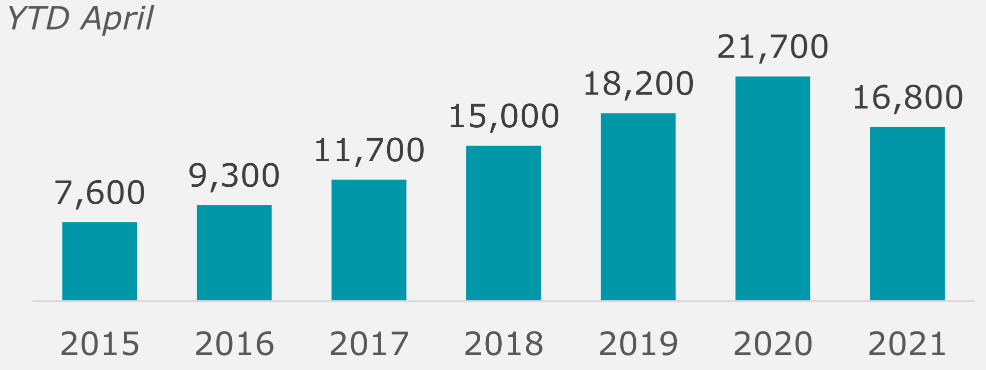
## 1 | Market size and growth trend

The number of Colombian students to Australia almost tripled between 2015 and 2020. Australia's share of the outbound tertiary student market jumped from 4% in 2014 to 10% in 2018.

**2%** **Outbound mobility ratio**
2 of every 100 Colombian tertiary students were studying abroad in 2018

**10%** **of Colombian outbound students studied in Australia**
4,800 of the 47,000 Colombian outbound tertiary students studied in Australia in 2018

Enrolments with Australian providers from Colombian students
*YTD April*




**5th** **largest market for Australia**
16,800 students inbound to Australia across all subsectors in 2021

Source: UNESCO UIS International mobility data (as at 2018)

Source: Department of Education, Skills and Employment (as at April 2021)

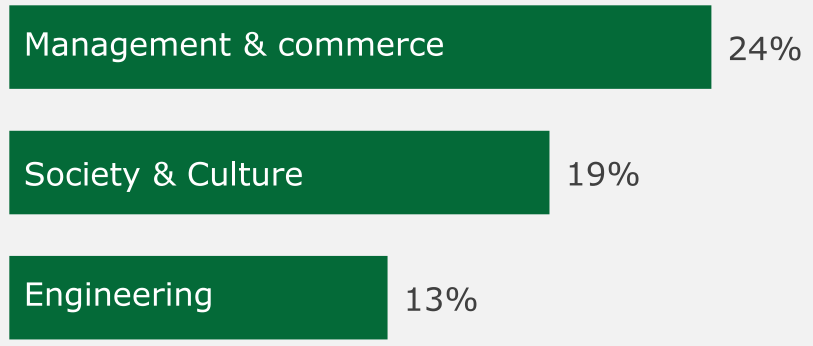
## 3 | Transnational education delivery

Offshore delivery in Colombia is small and limited to higher education (with no vocational education enrolments). In 2019, 54 students in Colombia were enrolled in offshore study with Australian higher education providers. 78% of the higher education enrolments were face-to-face.

**0.4%** **of all enrolments from Colombian students (at Australian providers) study outside Australia**
Based on full year 2019 enrolment levels
Offshore enrolments ranged from 40 to 100 across 2015 to 2019.

**60th** **Largest market for Higher Education offshore**
54 enrolments across 22 Australian higher education providers in 2019

Top 3 fields for offshore higher education (% enrolments)



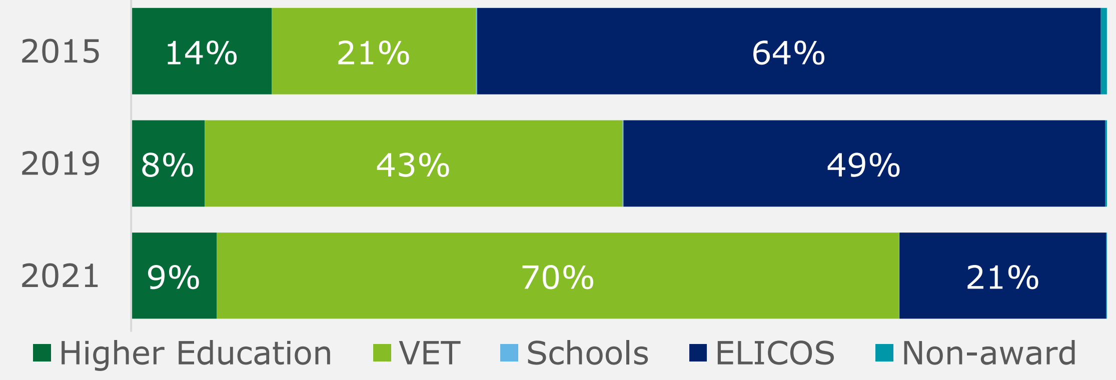

Note: VET enrolments range from 30 to 85 (2015-19) and are not shown.
'Offshore' students are those residing overseas for the term or semester.

Source: Department of Education, Skills and Employment, NCVER (2019)

## 2 | Student characteristics

From 2015 to 2021, the popularity and expansion of VET for Colombian students has seen a declining share in both ELICOS and higher education enrolments. Noting there has been some growth in the volume of enrolments in higher education (+400 enrolments, 2015-21).

Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Decline in ELICOS:** -5,400 enrolments in 2021 vs 2019
- **Growth in VET:** enrolments in 2019 were five times higher than 2015 enrolment levels. In 2021, VET enrolments grew +4,000 on 2020 levels.
- **Fields of education** undertaken by Colombian students in Australia are similar to those taken by all Colombian students in their home country.

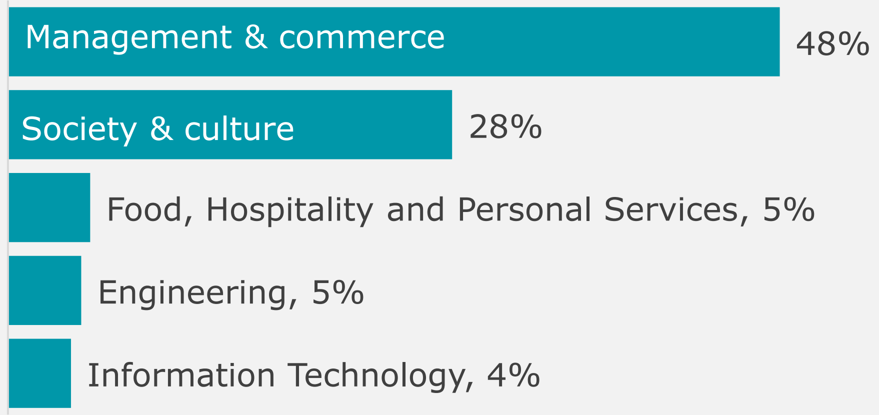
### Spending and employment

**$74** **spend per night on living costs by Colombian students in Australia**
Below the $89 average among all international students (2020)

**$36** **spend per day on education fees by Colombian students in Australia**
Below the $84 average spent on education among all international students (2020)

**78%** **share of students studying while working**
Above the 52% average for all international students employed in Australia while completing study (2016)

Top 5 fields of education (% enrolments)
*YTD April 2021*



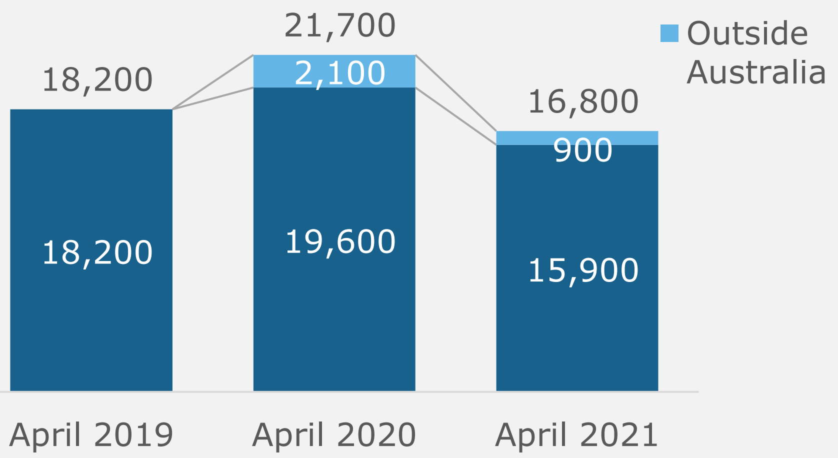

Note: Graduate outcomes data are unavailable.

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

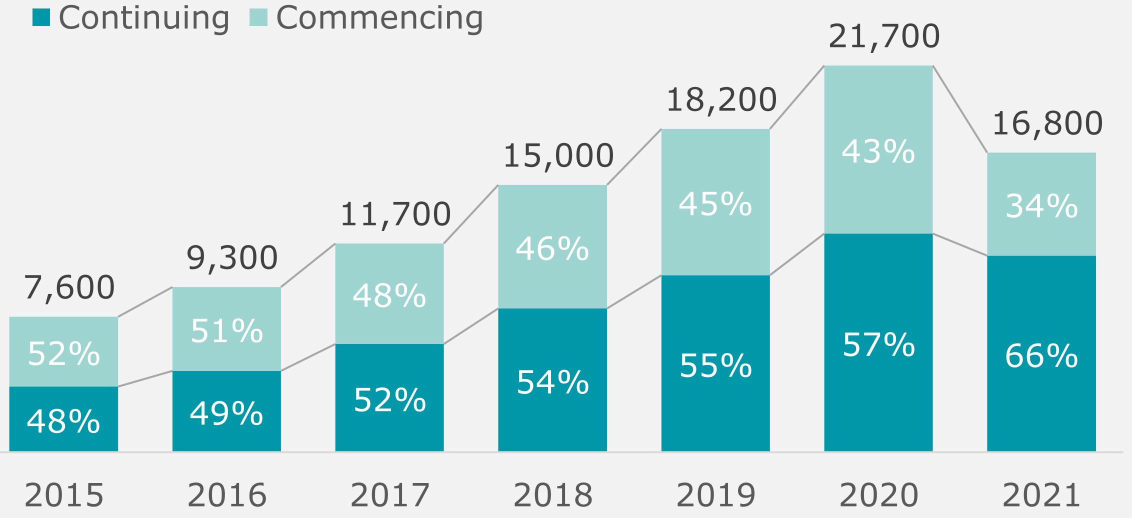
## 4 | Student flows across 2020 and 2021

Very few students have continued their studies from outside Australia (5% in April 2021), down from 10% in 2020 and below the 22% average for all markets.

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**5%** **of student visa holders outside Australia**
5% in August 2021, down from 10% in August 2020

**-8,000** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **52% of 2018-19 levels**

**-3,600** **new student commencements compared to 2020**
In 2021, 5,800 commencements represent **62% of 2020 levels**

**Deferrals falling to approach 2019 levels**
**138%** increase in deferrals from April 2019 to April 2020
In April 2021, deferral levels equated to 5% of April 2019 enrolments (compared to 4% of enrolments in April 2019)

**Cancellation rates remain high**
**63%** increase in cancellations from April 2019 to April 2020
In April 2021, cancellation levels equated to 14% of April 2019 enrolments (compared to 10% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees'*, *'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

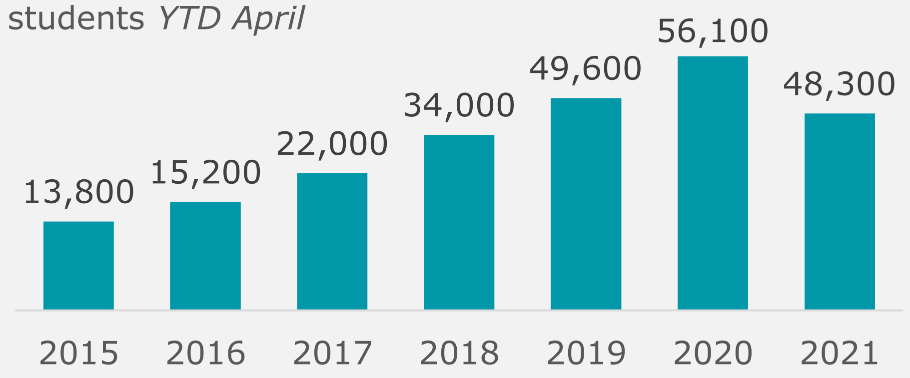
# Nepal Trends in international education and training, 2021

Australia is the dominant destination for Nepalese students. While cancellation rates have remained low, visa applications have fallen to 58% of 2018-19 levels. This may reflect the pause in Nepalese Government-issued 'no objection certificates', which are required for students to move money offshore.

## 1 | Market size and growth trend

The number of Nepalese students to Australia grew rapidly in the 5 years to 2020. The outbound mobility rates of Nepalese students are far higher than other markets, and Australia is the dominant destination – enrolling 40% of outbound Nepalese students in 2018, up from 26% in 2014.

Enrolments with Australian providers from Nepalese students *YTD April*




**20%** **Outbound mobility ratio**
20 of every 100 Nepalese tertiary students were studying abroad in 2018

**40%** **of Nepalese outbound students studied in Australia**
33,000 of the 82,000 Nepalese outbound tertiary students studied in Australia in 2018

**3rd** **largest market for Australia**
48,300 students inbound to Australia across all subsectors in 2021

Source: UNESCO UIS International mobility data (as at 2018)

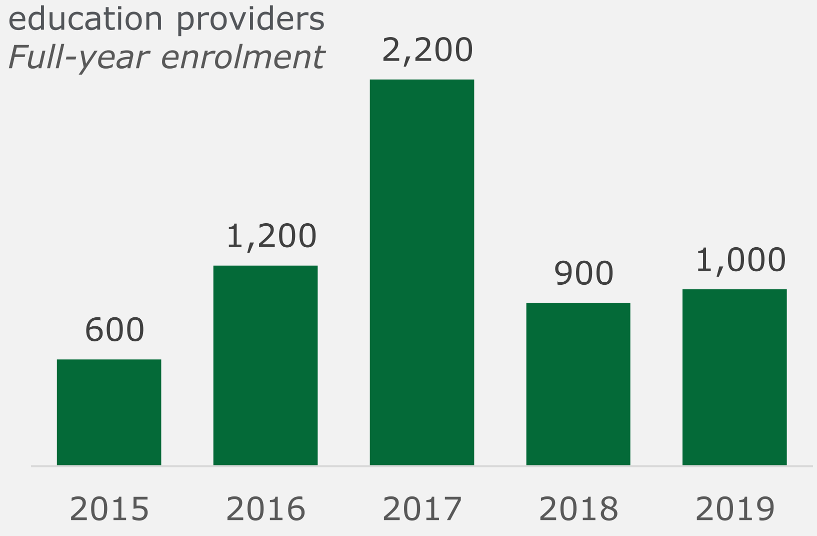
Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 1,000 Nepalese students were enrolled in tertiary study with Australian providers. 81% of the 1,000 higher education enrolments were face-to-face.

**2%** **of all enrolments from Nepal are from students outside Australia**
Based on full year 2019 enrolment levels

Offshore enrolments with Australian higher education providers
*Full-year enrolment*



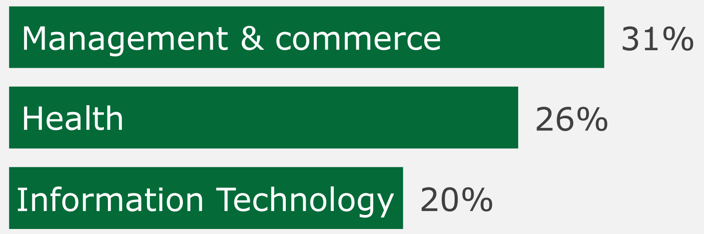

Note: VET enrolments range from 5 to 65 (2015-19) and are not shown.
'Offshore' students are those residing overseas for the term or semester.

**34th** **Largest market for VET offshore**
15 enrolments with <5 Australian Registered Training Organisations in 2019

Top field for offshore VET
(% enrolments)


**15th** **Largest market for Higher Education offshore**
1,000 enrolments with 39 Australian higher education providers in 2019

Top 3 fields for offshore higher education
(% enrolments)

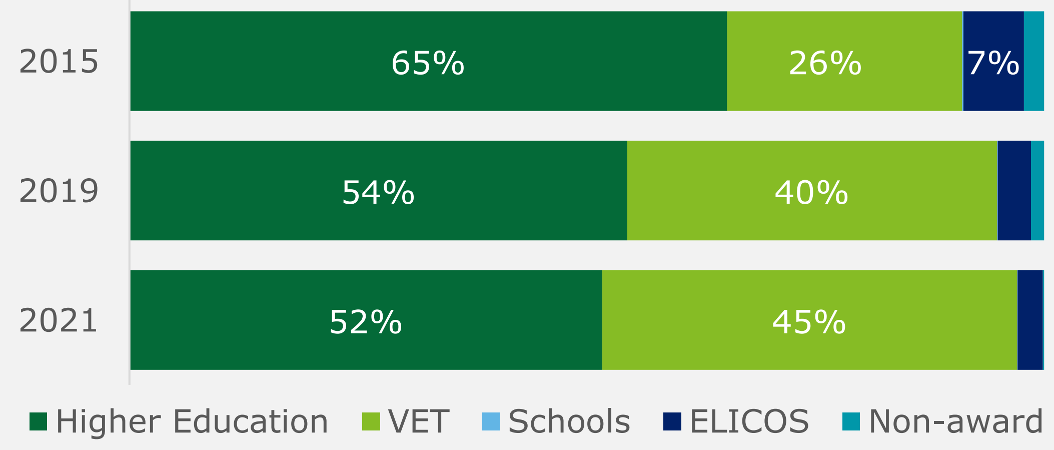



Source: Department of Education, Skills and Employment, NCVER (2019) Note: VET data rounded to nearest 5 enrolments, higher education data rounded to nearest 50 enrolments

## 2 | Student characteristics

Enrolments are predominately in the tertiary sector, and concentrated in business and IT fields. VET enrolments increased between 2021 and 2019, while ELICOS continued to decline.

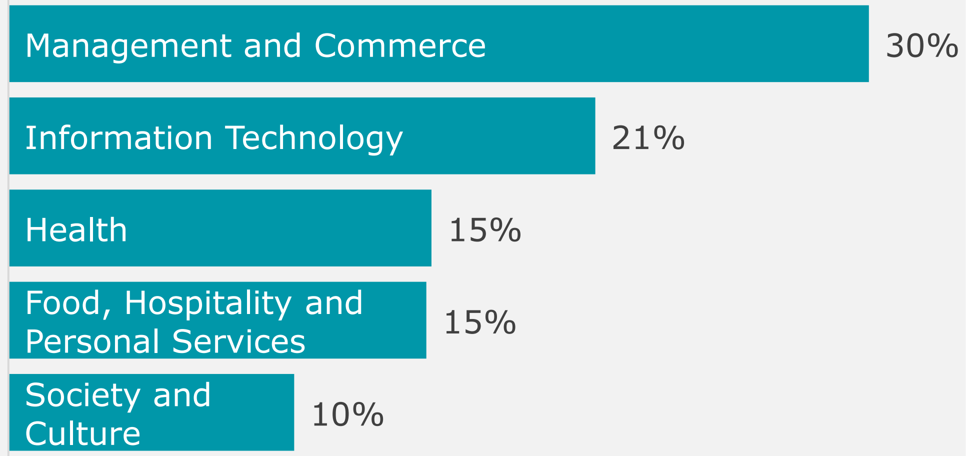
Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Decline in ELICOS:** -500 enrolments in 2021 compared to 2019
- **Growth in VET:** +1,900 enrolments in 2021 compared to 2019
- **Resilient demand for higher education**
  Moderate reduction in enrolments for higher education (down by 8% from 2019 to 2021). In 2021, higher education enrolments volume is at 270% of 2015 enrolments level.

Top 5 fields of education (% enrolments)
*YTD April 2021*




Note: Graduate outcomes data are unavailable.

### Spending and employment

**$48** **spend per night on living costs by Nepalese students in Australia**
Below the $89 average among all international students (2020)

**$60** **spend per day on education fees by Nepalese students in Australia**
Below the $84 average spent on education among all international students (2020)

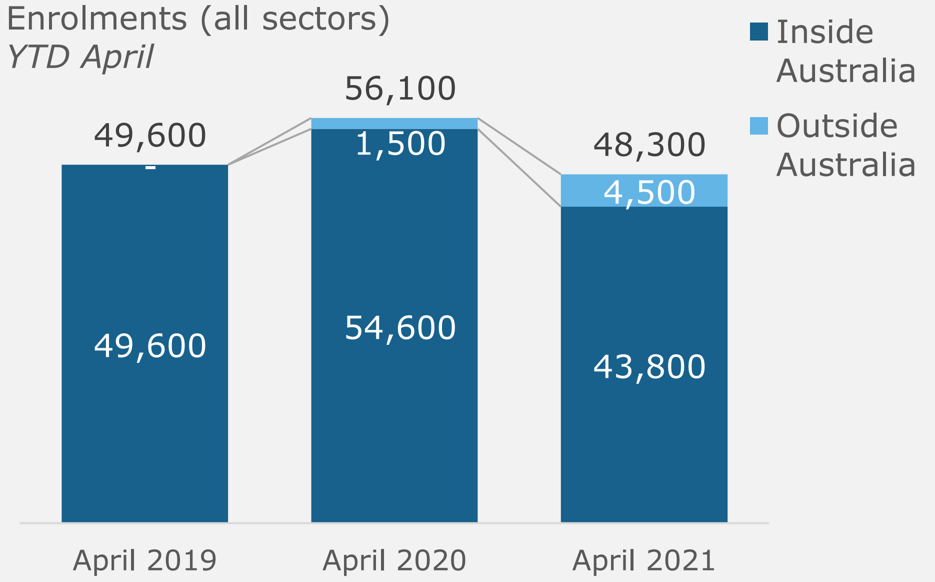
**75%** **share of students studying while working**
Above the 52% average for all international students employed in Australia while completing study (2016)

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

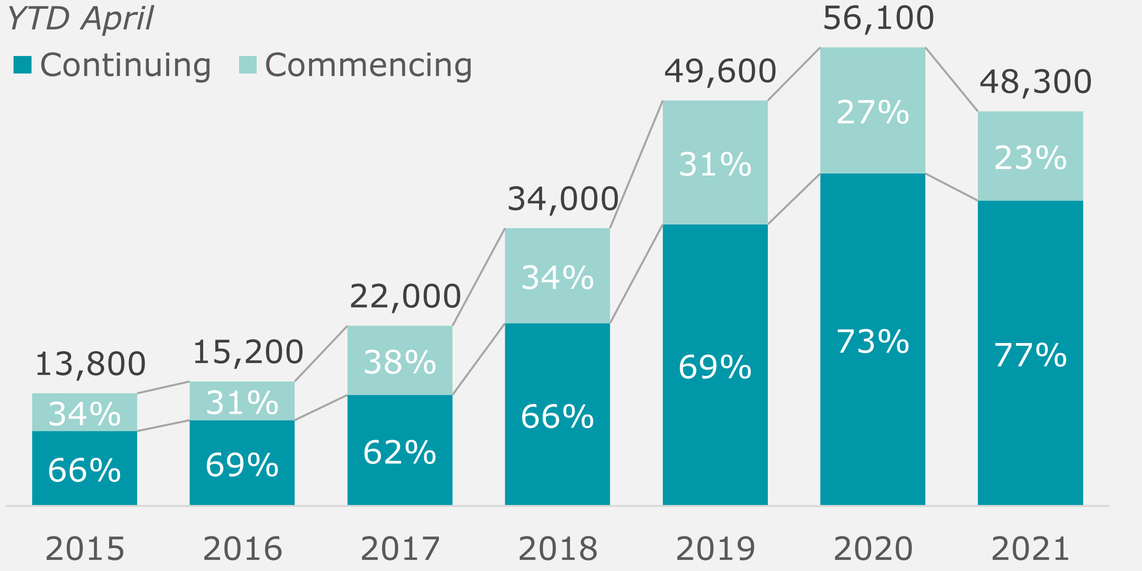
## 4 | Student flows across 2020 and 2021

Very few students are undertaking study online from outside Australia (9% compared to 22% on average for all markets). As at April 2021, commencements had fallen by 4,500 compared to 2020 – a reduction equivalent to 8% of 2020 enrolments.

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**9%** **of student visa holders outside Australia**
9% in August 2021, up from 3% in August 2020

**-18,200** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **58% of 2018-19 levels**

**-4,500** **new student commencements compared to 2020**
In 2021, 10,900 commencements represent **71% of 2020 levels**

### 2021 deferrals doubled 2019 levels

**32%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 4% of April 2019 enrolments (compared to 2% of enrolments in April 2019)

### Cancellations remain below 2019 levels

**27%** decline in cancellations from April 2019 to April 2020

In April 2021, cancellations levels equated to 12% of April 2019 enrolments (compared to 15% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees', 'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

This factsheet has been prepared by Deloitte Access Economics for the Australian Government Department of Education, Skills and Employment to understand the impact of COVID-19 on international education in Australia. The underlying methodology and analysis is detailed in a report to the Department. Unless otherwise noted, data as at April 2021.

# Malaysia Trends in international education and training, 2021

Malaysia is a major source market for Australian providers, particularly for transnational education delivery. Offshore students accounted for the majority of Malaysian enrolments with Australian providers in 2019. While the overall market remains large, enrolment growth had begun to slow and then decline after a peak in 2018, which has been exacerbated by COVID-19 disruptions.

## 1 | Market size and growth trend

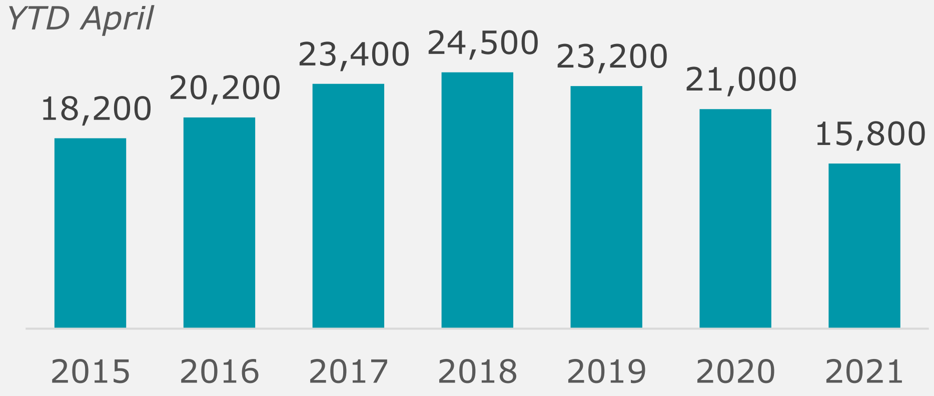
A mature market, the number of students from Malaysia studying in Australia was declining pre-pandemic. Notably, Australia's share of students from Malaysia remained stable over 2014-2018 at 25% - suggesting a reduced intake in recent years could reflect the impact of the country's developing domestic education sector.

**5%** **Outbound mobility ratio**
5 in every 100 Malaysian tertiary students were studying abroad in 2018

**25%** **of Malaysian outbound students studied in Australia**
16,000 of the 62,000 Malaysian outbound tertiary students studied in Australia in 2018

Source: UNESCO UIS International mobility data (as at 2018)

Enrolments with Australian providers from Malaysian students
*YTD April*



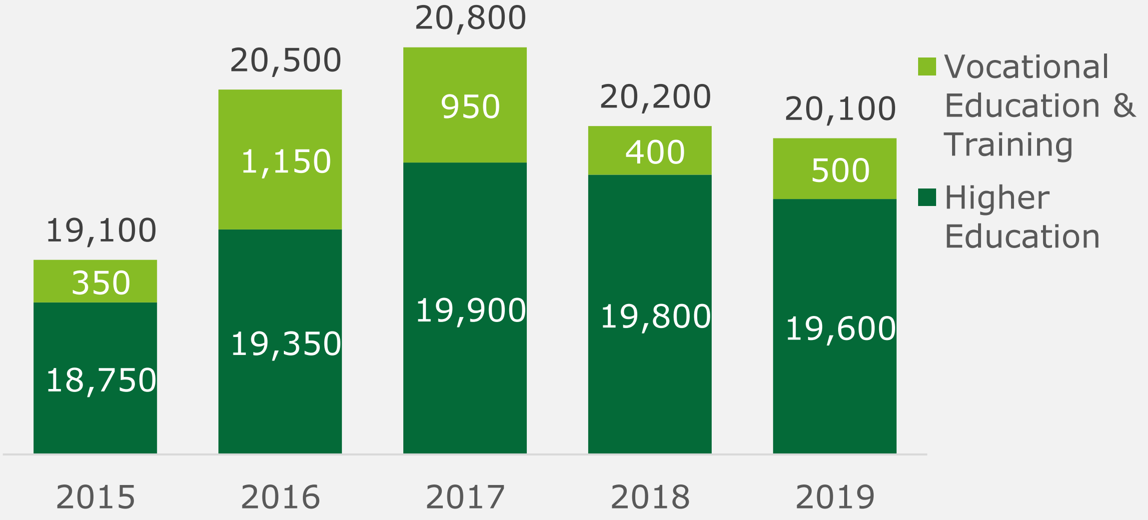

**8th** **largest market for Australia**
15,800 students inbound to Australia across all subsectors in 2021

Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 20,100 students within Malaysia enrolled in tertiary study with Australian providers. 96% of the 19,600 higher education enrolments were face-to-face.

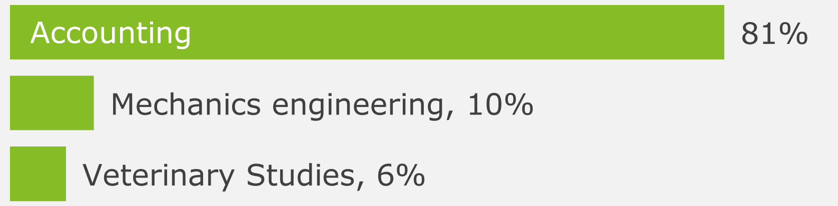
Offshore enrolments with Australian providers
*Full-year enrolment*




Note: 'Offshore' students are those residing overseas for the term or semester.

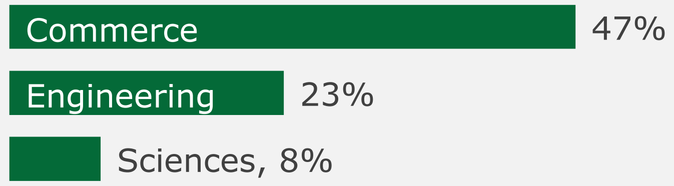
**11th** **Largest market for VET offshore**
~500 enrolments with 8 Australian Registered Training Organisations in 2019

Top 3 fields for offshore VET (% enrolments)




**3rd** **Largest market for Higher Education offshore**
20,100 enrolments with 52 Australian higher education providers in 2019

Top 3 fields for offshore higher education (% enrolments)

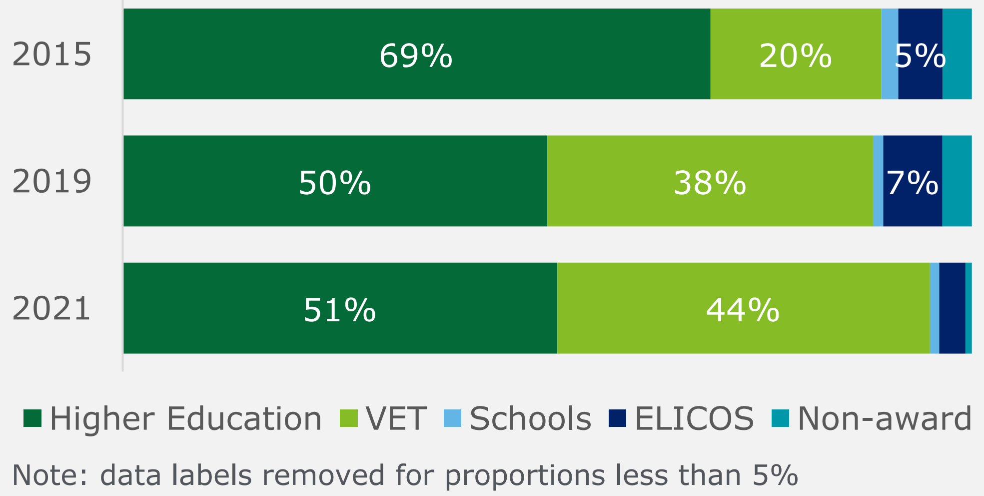



Source: Department of Education, Skills and Employment, NCVER (2019) Note: Data rounded to nearest 50 enrolments. Subtotals may not sum to totals due to rounding.

## 2 | Student characteristics

Enrolments are predominately in the tertiary sector and concentrated in management and commerce, with increased popularity for vocational courses over the last five years.

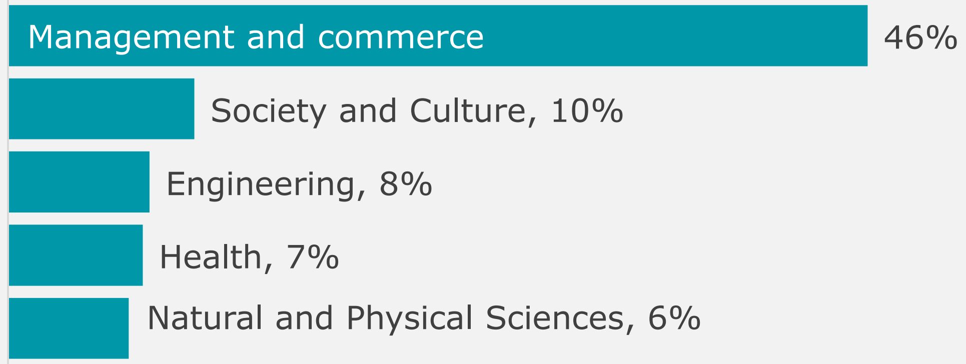
Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Decline in higher education enrolment** 2019 higher education is down by 8% compared to 2015 enrolment levels. Further, 2021 higher education enrolments continue to decline and is 36% lower than 2015 enrolment levels.
- **Growing demand for VET** 2019 VET enrolments became twice as large as 2015 VET enrolments.

Top 5 fields of education (% enrolments)
*YTD April 2021*




### Spending and employment

**$72** **spend per night on living costs by Malaysian students in Australia**
Below the $89 average among all international students (2020)

**$109** **spend per day on education fees by Malaysian students in Australia**
Above the $84 average spent on education among all international students (2020)

**29%** **share of students studying while working**
Below the 52% average for all international students employed in Australia while completing study (2016)

### Graduate outcomes

**84%** **employment rate for Malaysian graduates looking for work in Australia**
Below the 86% average for all international graduates (2013-18)

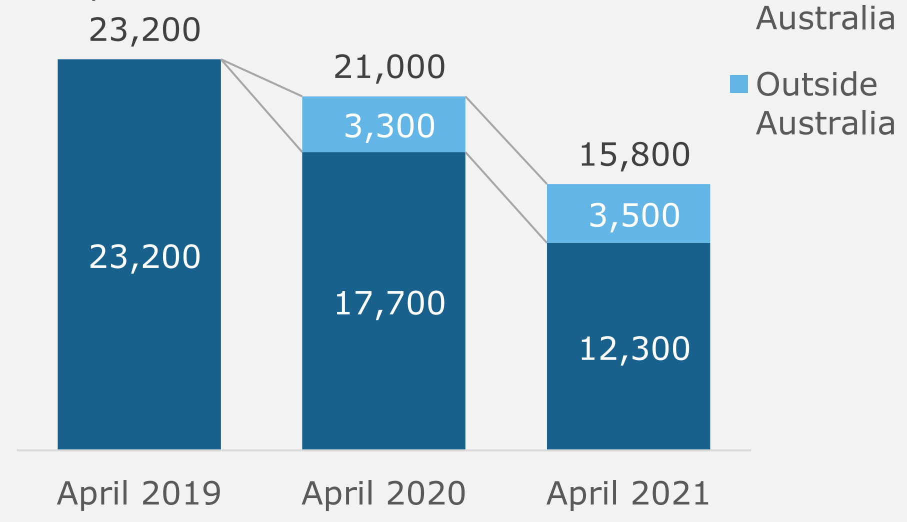
**94%** **employment rate for Malaysian graduates looking for work in Malaysia**
Above the 93% average among all international graduates looking for work in their home countries (2013-18)

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

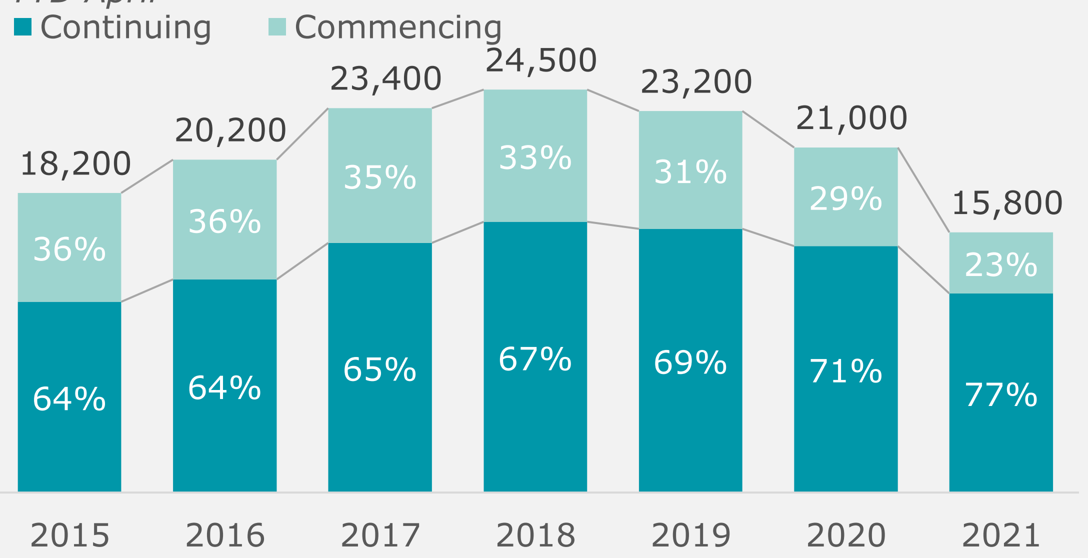
## 4 | Student flows across 2020 and 2021

One in five (22%) Malaysian student visa holders remain outside Australia. As at April 2021, commencements had fallen by 2,300 compared to 2020 (a reduction equivalent to 11% of 2020 enrolments).

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**22%** **of student visa holders outside Australia**
22% in April 2021, up from 16% in August 2020

**-6,000** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **47% of 2018-19 levels**

**-2,300** **new student commencements compared to 2020**
In 2021, 3,700 commencements represent **62% of 2020 levels**

**Deferrals activity continues in 2021**

**40%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 2% of April 2019 enrolments (compared to 1% of enrolments in April 2019)

**Cancellation levels lower than 2019**

**7%** fewer cancellations in 2020 compared to 2019.

In April 2021, deferral levels equated to 7% of April 2019 enrolments (compared to 11% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees'*, *'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

This factsheet has been prepared by Deloitte Access Economics for the Australian Government Department of Education, Skills and Employment to understand the impact of COVID-19 on international education in Australia. The underlying methodology and analysis is detailed in a report to the Department. Unless otherwise noted, data as at April 2021.

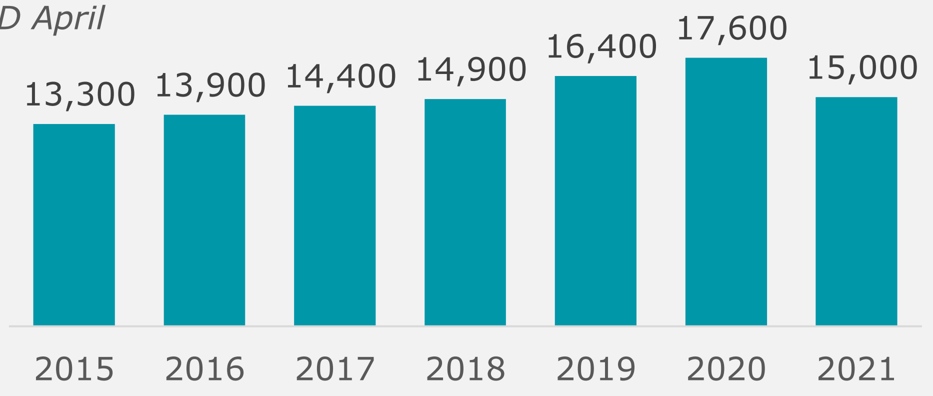
# Indonesia Trends in international education and training, 2021

Australia is the most popular study destination for outbound Indonesian tertiary students, with 24% of outbound Indonesian tertiary students studying with Australian providers. The reduction in commencements in 2021 has been modest compared to other markets, however high cancellations rates and low visa applications (half of 2018-19 levels) warrant monitoring.

## 1 | Market size and growth trend

Growth in enrolments from Indonesia was moderate from 2015 to 2020, with the share of all Indonesian outbound tertiary students to Australia remaining consistent, at 24% across 2014-2018.

Enrolments with Australian providers from Indonesian students
*YTD April*




**0.6%** **Outbound mobility ratio**
0.6 of every 100 Indonesian tertiary students were studying abroad in 2018

**24%** **of Indonesian outbound students studied in Australia**
12,200 of the 49,900 Indonesian outbound tertiary students studied in Australia in 2018

**9th** **largest market for Australia**
15,000 students inbound to Australia across all subsectors in 2021

Source: UNESCO UIS International mobility data (as at 2018)

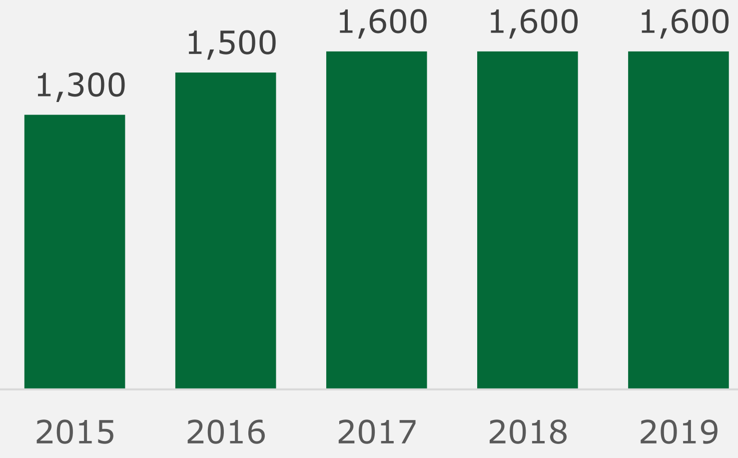
Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 1,600 Indonesian students were enrolled in tertiary study with Australian providers. 89% of the 1,600 higher education enrolments were face-to-face.

**8%** **of all enrolments from Indonesia are from students outside Australia**
Based on full year 2019 enrolment levels

Offshore enrolments with Australian providers
*Full-year enrolment*




Note: VET enrolments range from 0 to 50 (2015-19) and are not shown. 'Offshore' students are those residing overseas for the term or semester.

**39th** **Largest market for VET offshore**
50 enrolments with <5 Australian Registered Training Organisations in 2019

Top field for offshore VET
(% enrolments)

- Finance 100%

**11th** **Largest market for Higher Education offshore**
1,600 enrolments with 48 higher education providers in 2019

Top 3 fields for offshore higher education
(% enrolments)

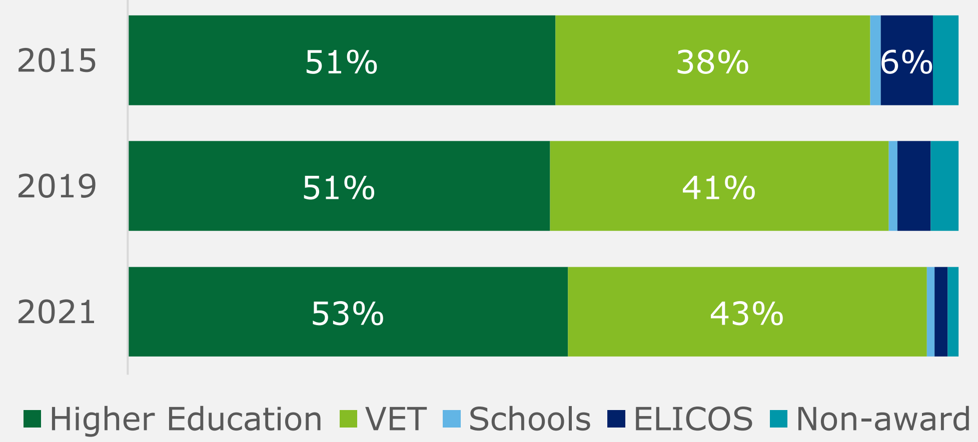
- Management and Commerce 53%
- Society and Culture, 14%
- Sciences, 7%

Source: Department of Education, Skills and Employment, NCVER (2019) Note: Data rounded to nearest 50 enrolments.

## 2 | Student characteristics

Enrolments are predominately in the tertiary sector, with demand for higher education and VET study remaining resilient across 2020 and 2021, with the majority of studies in management and commerce.

Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Decline in ELICOS:** -420 enrolments in 2021 vs 2019. 2021 ELICOs enrolments are at 30% of 2015 levels.
- **Resilient demand for tertiary study:** moderate reduction in enrolments for higher education (-5%) and VET (-3%) from 2019 to 2021.

Top 5 fields of education (% enrolments)
*YTD April 2021*

- Management and Commerce 51%
- 10% Society and Culture
- 7% Food, Hospitality and Personal Services
- 6% Information Technology
- 5% Natural and Physical Sciences

### Spending and employment

**$75** **spend per night on living costs by Indonesian students in Australia**
Below the $89 average among all international students (2020)

**$67** **spend per day on education fees by Indonesian students in Australia**
Below the $84 average spent on education among all international students (2020)

**44%** **share of students studying while working**
Below the 52% average for all international students employed in Australia while completing study (2016)

### Graduate outcomes

**87%** **employment rate for Indonesian graduates looking for work in Australia**
Above the 86% average for all international graduates (2013-18)

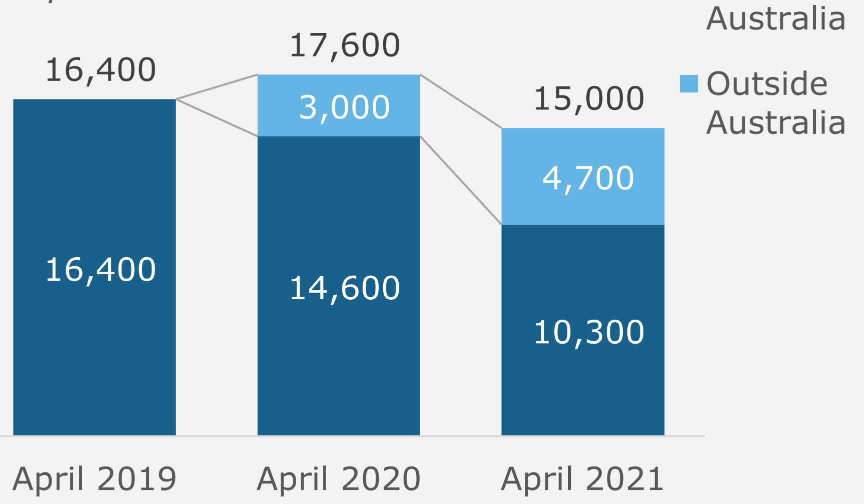
**94%** **employment rate for Indonesian graduates looking for work in Indonesia**
Above the 93% average among all international graduates looking for work in their home countries (2013-18)

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

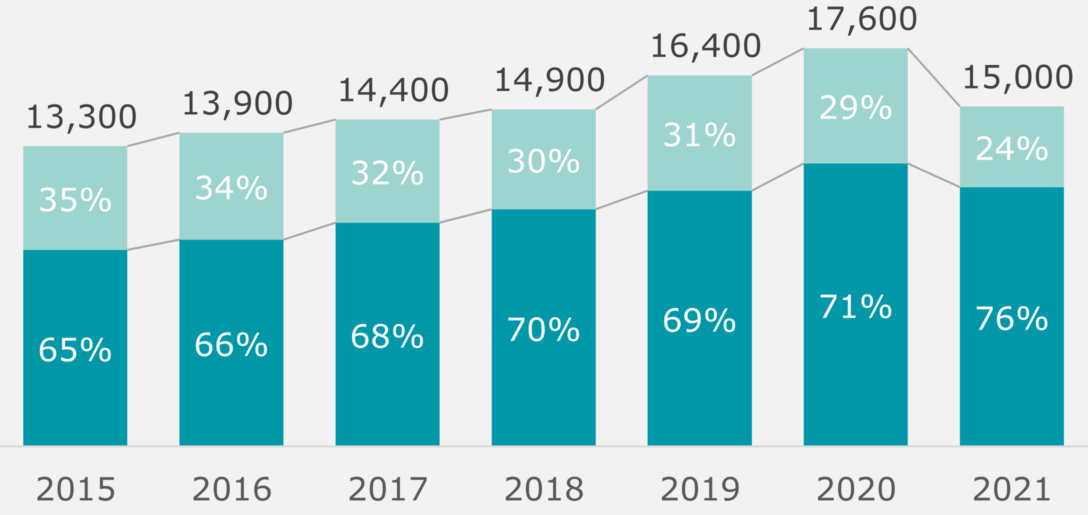
## 4 | Student flows across 2020 and 2021

Almost one third (31%) of Indonesian student visa holders remain outside Australia as at August 2021. As at April 2021, commencements had fallen by 1,500 compared to 2020 (a reduction equivalent to 9% of 2020 enrolments).

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**31%** **of student visa holders outside Australia**
31% in August 2021, up from 17% in August 2020

**-4,900** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **52% of 2018-19 levels**

**-1,500** **new student commencements compared to 2020**
In 2021, 3,600 commencements represent **71% of 2020 levels**

**2021 deferral levels four times 2019 levels**
**95%** increase in deferrals from April 2019 to April 2020
In April 2021, deferral levels equated to 4% of April 2019 enrolments (compared to 1% of enrolments in April 2019)

**2021 cancellations moderating**
**45%** increase in cancellations from April 2019 to April 2020
In April 2021, deferral levels equated to 7% of April 2019 enrolments (compared to 6% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees'*, *'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

*This factsheet has been prepared by Deloitte Access Economics for the Australian Government Department of Education, Skills and Employment to understand the impact of COVID-19 on international education in Australia. The underlying methodology and analysis is detailed in a report to the Department. Unless otherwise noted, data as at April 2021.*

# Philippines Trends in international education and training, 2021

Strong growth in vocational education over 2019-20 supported increased enrolments from Filipino students, which have remained relatively high in 2021. An increase in the number of students completing study outside Australia in 2021 has seen enrolment volumes remain at 2019 levels – although high cancellation rates and low visa applications warrant monitoring.

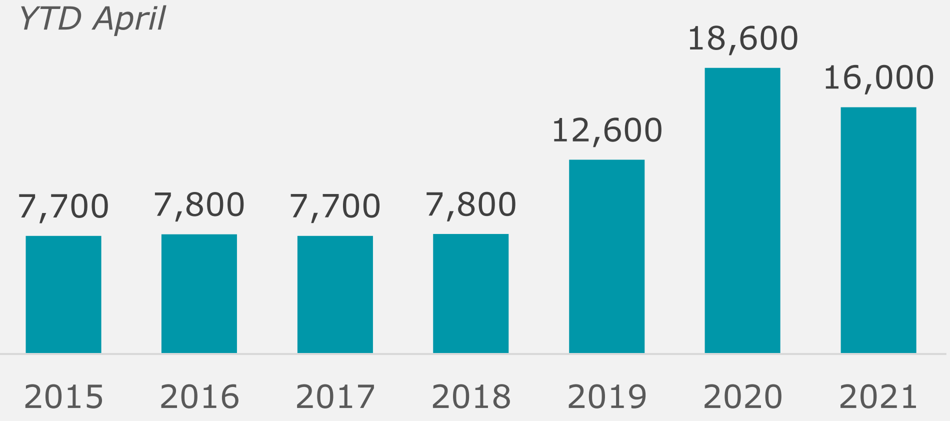
## 1 | Market size and growth trend

Significant enrolment growth in VET across 2019 and 2020 bolstered 2021 enrolment levels, with students from the Philippines representing 4% of Australian enrolments in 2021.

**0.5%** **Outbound mobility ratio**
0.5 of every 100 Filipino tertiary students were studying abroad in 2018

**32%** **of Filipino outbound students studied in Australia**
6,000 of the 18,900 Filipino outbound tertiary students studied in Australia in 2018

Enrolments with Australian providers from Filipino students
*YTD April*




**7th** **largest market for Australia**
16,000 students inbound to Australia across all subsectors in 2021

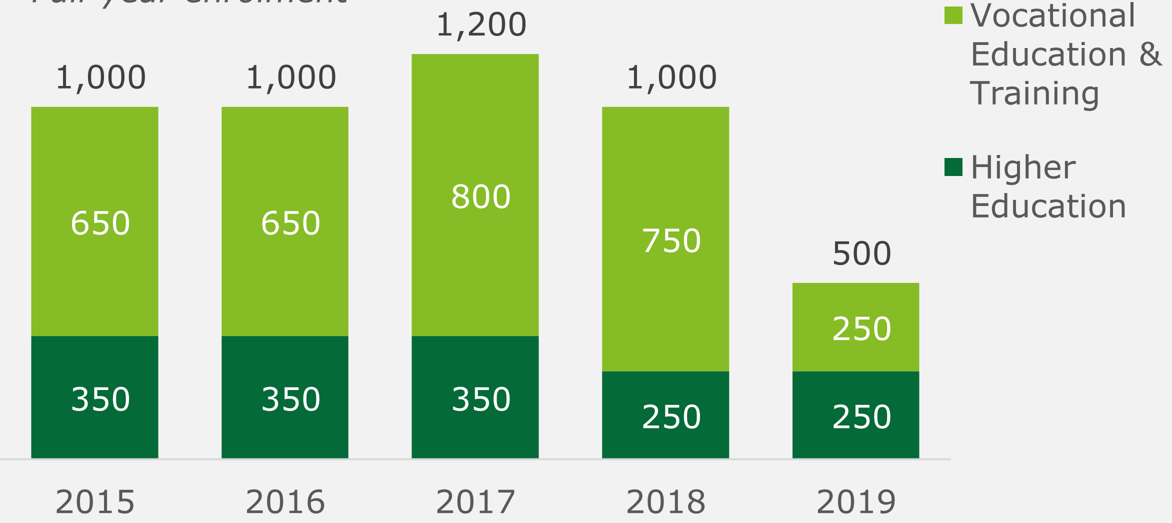
Source: UNESCO UIS International mobility data (as at 2018)

Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 500 students in the Philippines were enrolled in tertiary study with Australian providers. 67% of the 250 higher education enrolments were face-to-face.

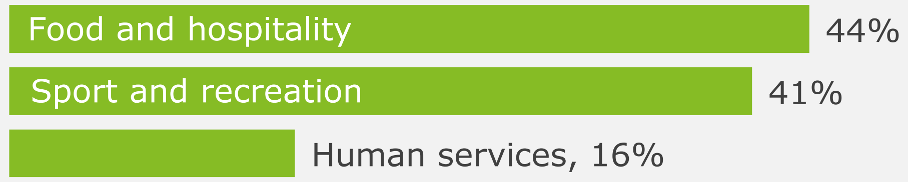
Offshore enrolments with Australian providers
*Full-year enrolment*




Note: 'Offshore' students are those residing overseas for the term or semester.

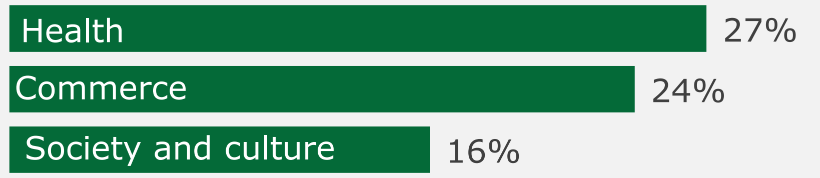
**16th** **Largest market for VET offshore**
250 enrolments with 7 Australian Registered Training Organisations in 2019

Top 3 fields for offshore VET
(% enrolments)




**32nd** **Largest market for Higher Education offshore**
250 enrolments with 33 higher education institutes in 2019

Top 3 fields for offshore higher education
(% enrolments)

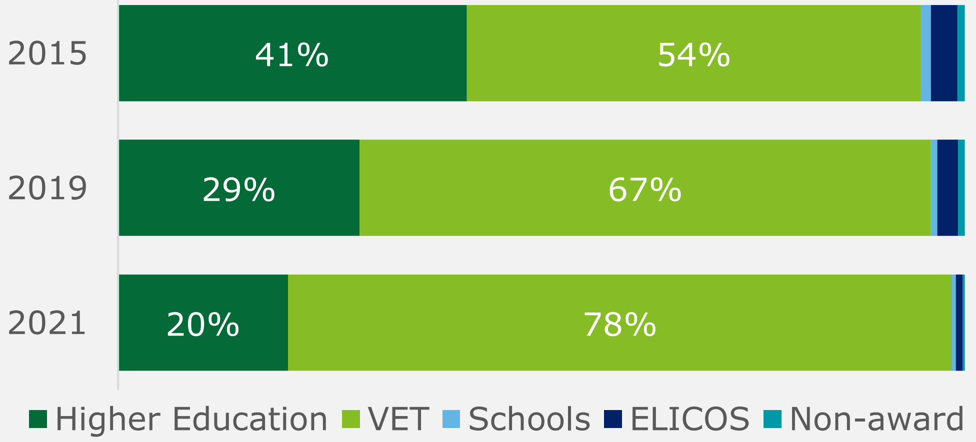



Source: Department of Education, Skills and Employment, NCVER (2019) Note: Data rounded to nearest 50 enrolments. Subtotals may not sum to totals due to rounding.

## 2 | Student characteristics

Enrolments are increasingly concentrated in the VET sector (67% of enrolments in 2019), as both the share and volume of higher education enrolments declines.

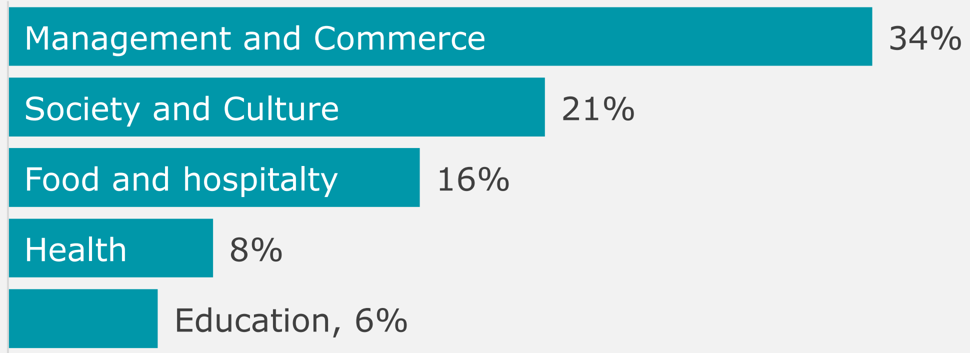
Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Decline in Higher Education:** -400 enrolments in 2021 compared to 2019 (reflecting a return to 2015 levels)
- **Strong growth in VET:** +4,300 enrolments in 2019 vs 2015 followed by a further 4,000 increase in enrolment in 2021

Top 5 fields of education (% enrolments)
*YTD April 2021*




### Spending and employment

**$53** **spend per night on living costs by Filipino students in Australia**
Below the $89 average among all international students (2020)

**$41** **spend per day on education fees by Filipino students in Australia**
Below the $84 average spent on education among all international students (2020)

**70%** **share of students studying while working**
Above the 52% average for all international students employed in Australia while completing study (2016)

### Graduate outcomes

**97%** **employment rate for Filipino graduates looking for work in Australia**
Above the 86% average for all international graduates (2013-18)

**98%** **employment rate for Filipino graduates looking for work in the Philippines**
Above the 93% average among all international graduates looking for work in their home countries (2013-18)

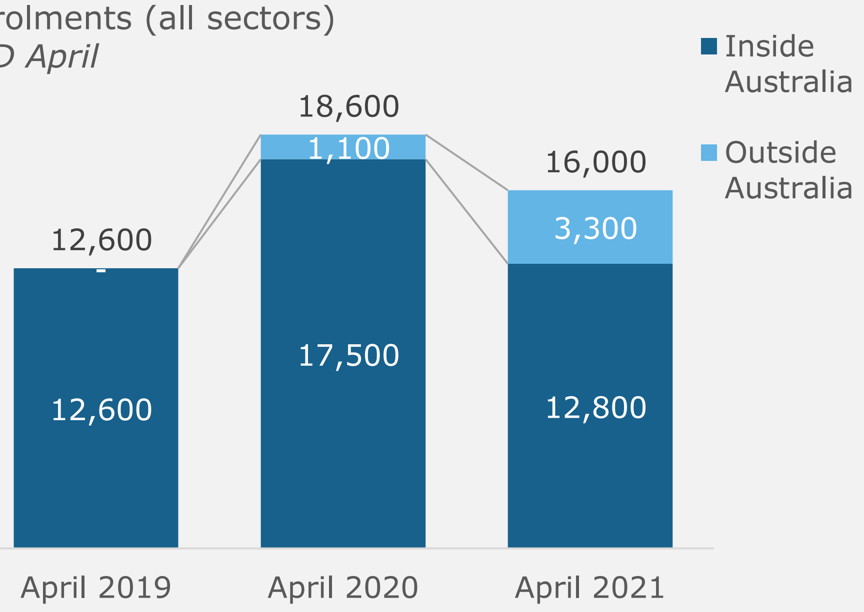
Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)



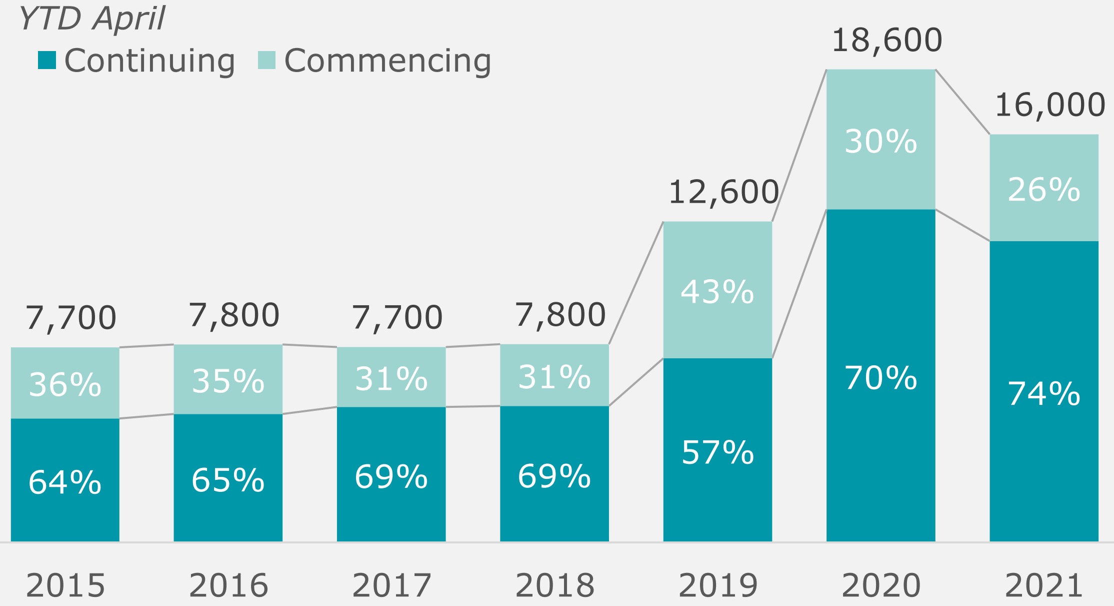
## 4 | Student flows across 2020 and 2021

One in five student visa holders (20%) from the Philippines remain outside Australia. As at April 2021, commencements had fallen by 1,300 compared to 2020 levels (a reduction equivalent to 7% of 2020 enrolments).

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**20%** **of student visa holders outside Australia**
20% in August 2021, up from 6% in August 2020

**-5,600** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **58% of 2018-19 levels**

**-1,300** **new student commencements compared to 2020**
In 2021, 4,200 commencements represent **76% of 2020 levels**

**Significant deferral activity across 2020 and 2021**

**174%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 14% of April 2019 enrolments (compared to 2% of enrolments in April 2019)

**Cancellations rates remain high relative to 2019**

**188%** increase in cancellations from April 2019 to April 2020

In April 2021, cancellation levels equated to 23% of April 2019 enrolments (compared to 10% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees'*, *'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

*This factsheet has been prepared by Deloitte Access Economics for the Australian Government Department of Education, Skills and Employment to understand the impact of COVID-19 on international education in Australia. The underlying methodology and analysis is detailed in a report to the Department. Unless otherwise noted, data as at April 2021.*

# Sri Lanka Trends in international education and training, 2021

Enrolments from Sri Lanka grew rapidly over the years to 2020, driven by growth in demand for vocational education. Offshore delivery by Australian providers in Sri Lanka represents a large market, relative to the total volume of enrolments.

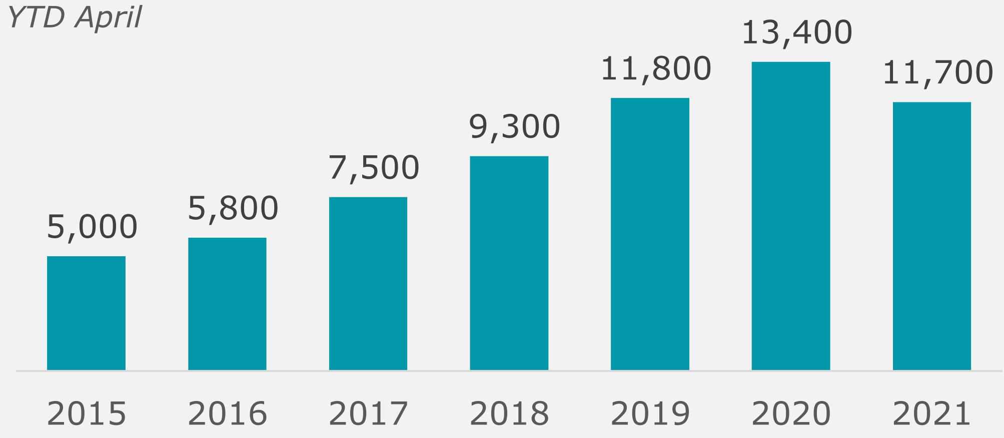
## 1 | Market size and growth trend

An emerging source market, enrolments from Sri Lanka grew rapidly to 2020. Australia has received an increasing share of all Sri Lankan outbound students, at 37% in 2018 (up from 27% in 2014).

**0.4%** **Outbound mobility ratio**
0.4 of every 100 Sri Lankan tertiary students were studying abroad in 2018

**37%** **of Sri Lankan outbound students studied in Australia**
8,800 of the 24,000 Sri Lankan outbound tertiary students studied in Australia in 2018

Enrolments with Australian providers from Sri Lankan students
*YTD April*




**13th** **largest market for Australia**
11,700 students inbound to Australia across all subsectors in 2021

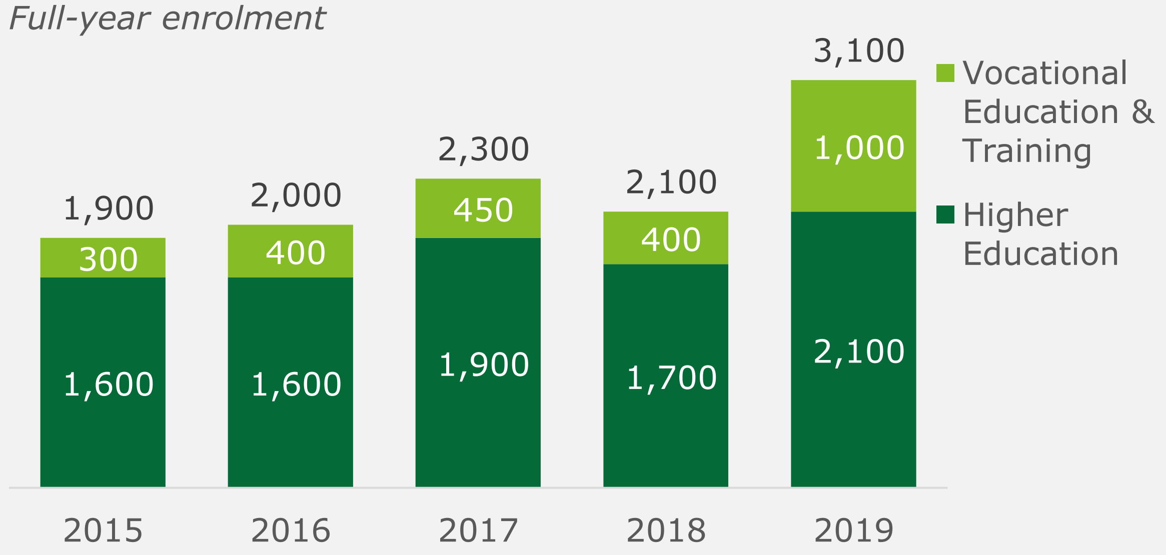
Source: UNESCO UIS International mobility data (as at 2018)

Source: Department of Education, Skills and Employment (as at April 2021)

## 3 | Transnational education delivery

In 2019, 3,100 students in Sri Lanka were enrolled in tertiary study with Australian providers. 83% of the 2,100 higher education enrolments were face-to-face.

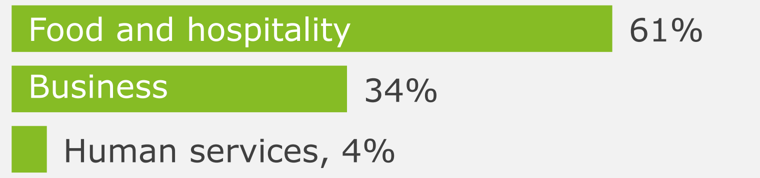
Offshore enrolments with Australian providers
*Full-year enrolment*




Note: 'Offshore' students are those residing overseas for the term or semester.

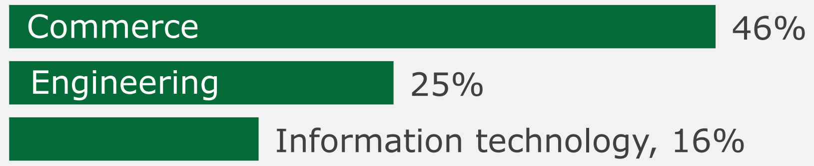
**6th** **Largest market for VET offshore**
1,000 enrolments with <5 Australian Registered Training Organisations in 2019

Top 3 fields for offshore VET (% enrolments)




**10th** **Largest market for Higher Education offshore**
2,100 enrolments with 38 higher education providers in 2019

Top 3 fields for offshore higher education (% enrolments)

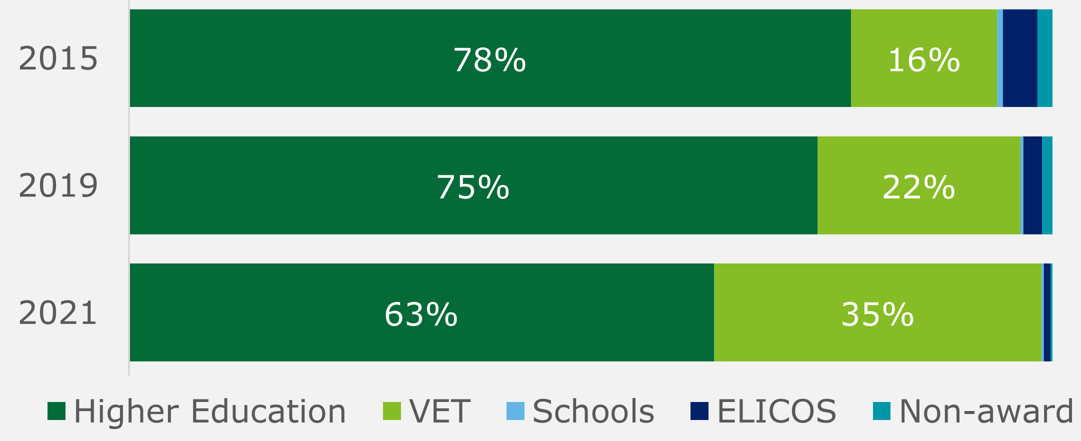



Source: Department of Education, Skills and Employment, NCVER (2019) Note: Data rounded to nearest 50 enrolments. Subtotals may not sum to totals due to rounding.

## 2 | Student characteristics

Enrolments from Sri Lankan students are concentrated in tertiary programs, and although predominately in higher education, there has been significant growth in VET enrolments over the six years to 2021.

Enrolments (by sector)
*YTD April*




Note: data labels removed for proportions less than 5%

- **Growth in VET:** +1,500 enrolments in 2021 vs 2019. Reflecting rapid growth, 2021 VET enrolments are 5 times as large as 2015 levels.
- **Decline in Higher Education:** -1,400 enrolments in 2021 vs 2019. Despite the decline since 2019, 2021 higher education enrolments are double 2015 levels.
- **Decline in ELICOS:** -1,400 enrolments in 2021 vs 2019. In April 2021, ELICOS enrolments were at half of April 2015 levels.

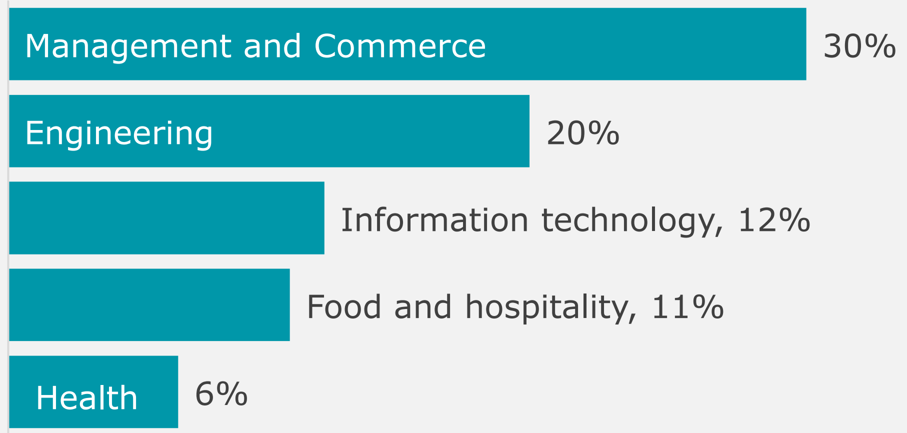
### Spending and employment

**$65** **spend per night on living costs by Sri Lankan students in Australia**
Below the $89 average among all international students (2020)

**$72** **spend per day on education fees by Sri Lankan students in Australia**
Below the $84 average spent on education among all international students (2020)

**58%** **share of students studying while working**
Above the 52% average for all international students employed in Australia while completing study (2016)

Top 5 fields of education (% enrolments)
*YTD April 2021*



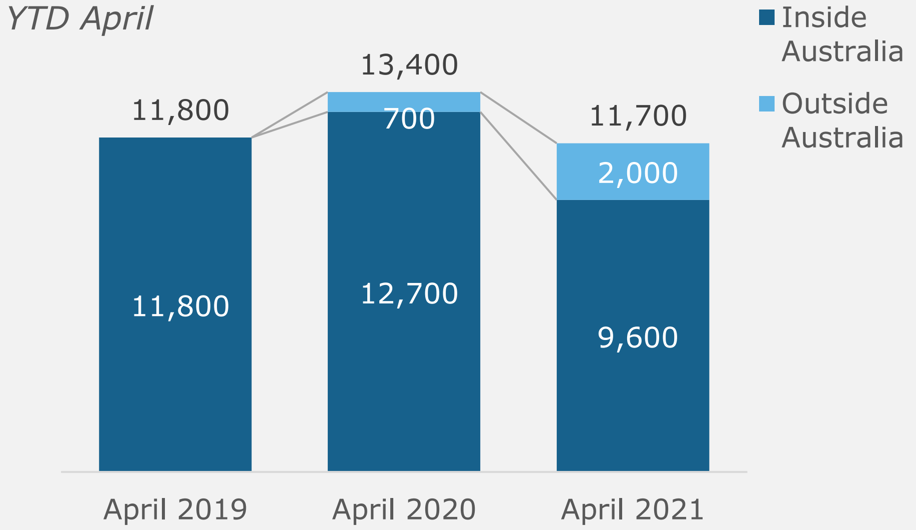

Note: Graduate outcomes data are unavailable.

Source: Department of Education, Skills and Employment Tourism Research Australia (2020), Australian Bureau of Statistics (2016)

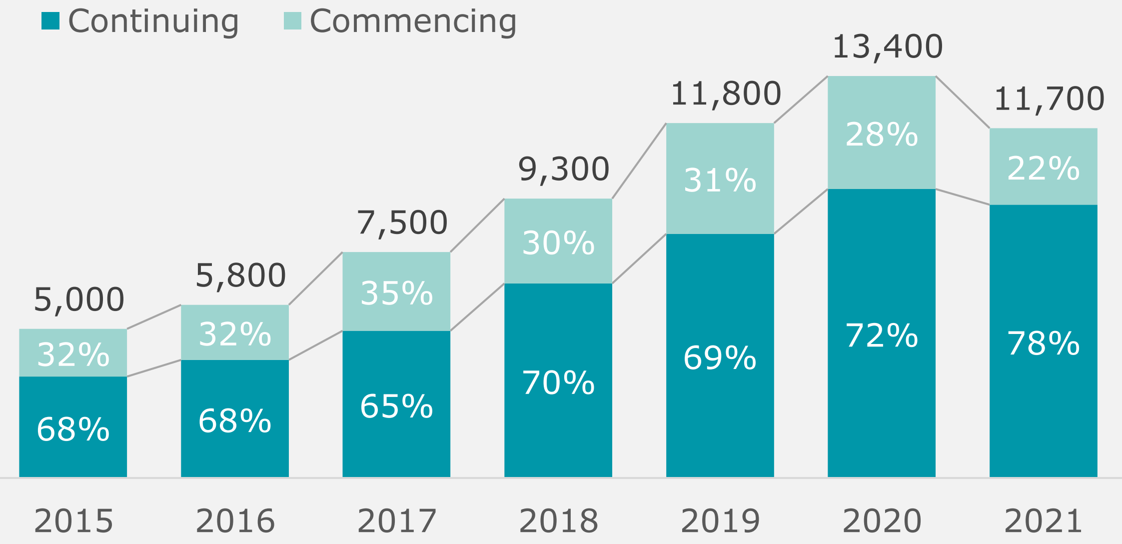
## 4 | Student flows across 2020 and 2021

Almost one in five (18%) student visa holders from Sri Lanka remain outside Australia. As at April 2021, commencements had fallen by 1,200 compared to 2020 (a reduction equivalent to 10% of 2020 enrolments).

Enrolments (all sectors)
*YTD April*




Commencing and continuing enrolments (all sectors)
*YTD April*




**18%** **of student visa holders outside Australia**
18% in August 2021, up from 6% in August 2020

**-2,670** **student visa applications compared to 2018-19 levels**
2020-21 applications represent **67% of 2018-19 levels**

**-1,200** **new student commencements compared to 2020**
In 2021, 2,600 commencements represent **68% of 2020 levels**

**Deferral rates twice as high as 2019**

**36%** increase in deferrals from April 2019 to April 2020

In April 2021, deferral levels equated to 5% of April 2019 enrolments (compared to 2% of enrolments in April 2019)

**Cancellations have fallen below 2019 levels**

**33%** increase in cancellations from April 2019 to April 2020

In April 2021, cancellation levels equated to 12% of April 2019 enrolments (compared to 14% of enrolments in April 2019)

Source: Department of Education, Skills and Employment (as at April 2021), Department of Home Affairs (August 2021). Notes: Share outside Australia an estimate only. Visa applications reported by financial year. Cancellations defined by changes to students' confirmation of enrolment due to *'non-payment of fees'*, *'non-commencement of studies'*, or *'notified cessation of study'*. Subtotals may not sum to totals due to rounding.

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