Understanding the impact of country-specific policy responses on student mobility

‘Deep Dive’ case study #3 | International Higher Education Student Flows via Global Data Integration Project

This case study focuses on the impact of policy changes on global student mobility

This provides insight on the impact of policy changes and the implications for Australia's international education sector.

What we already know

Policy responses by government can have a significant impact on the preferences of students, parents and agents in overseas study destination.

The performance of key destination countries also differs for certain source countries – not aligning with the broader global mobility trends. This difference in performance may point towards the impact of government policy interventions (for example in student visa and post-study work rights settings).

What is the focus of the research

The research for this case study has focused on three key areas:

1. Understanding different student mobility trends for four key destination countries (US, UK, Australia and Canada) with regards to students from four key source countries (India, Nigeria, Vietnam and South Korea).
2. Desktop review and engagement through Austrade's offshore network to determine potential causation for identified changes in global student mobility between source countries.
3. Development of lessons for the sector based on the identified impacts of policy settings on student numbers.

Why is this research area important

This case study has a strong policy lens and focuses on a policy area and the potential implications on student mobility and student preference.

This is relevant given ongoing policy considerations and reflection on the impact policy changes can have for the Australian sector.

Our approach uses student mobility data and desktop review of policy changes to draw out key lessons and implications for the sector

The blended methodological approach focuses on the impacts of policy changes across certain destination countries and subsequent changes in student mobility with selected source countries.

Section 1 – Differential global student mobility of destination countries

Outlining the context for policy impacts and providing an overview of the macro-student flows between select source and destination countries.

Section 2 – Impacts of policy settings on mobility

Assess changes in country policy settings to identify alignment with points of inflection in global student mobility.

Section 3 – Case studies on key areas of focus

Determine likely impact of policy changes through analysis on nature of decline and understand the flow on impact to other destination countries.

Key takeaways on international student policy settings

Four key lessons are presented from the case study research. While this case study has focused on the policy settings of destination countries, other factors will likely also have an impact.

1. **Different policy types appear to have different levels of impact.** Based on the case study topics the biggest changes in student flows were tied to changes in policy settings which restricted or enhanced to work after study. In Australia and the UK changes in post-study work rights during this period, resulting in significant declines, while recent changes to enhance the PR pathway for students in Canada appear to have resulted in increased student numbers.

2. **Changes in policy settings, especially in visa, work rights and academic requirements, can have a large impact.** Throughout the case studies, examples are presented where changes in policy settings appear to have had a significant impact on inbound student mobility. These support positive flows, where favourable changes can result in increasing student numbers, and negative flows, resulting in a declining number of students.

3. **Subsequent policy changes, if quick, can lessen the damage but are unlikely to reverse the change.** The UK and Australia's policy response shows that reverting policy settings can minimise the damage. While Australia responded three years later by reverting its policy settings, the UK instead *doubled down* on its changes introducing tougher visa settings. This has been reflected in student markets – particularly in the UK. While changes in Australian settings did begin to reverse the change in Indian students, it took eight years from the initial policy impact, to return to its previous market share position.

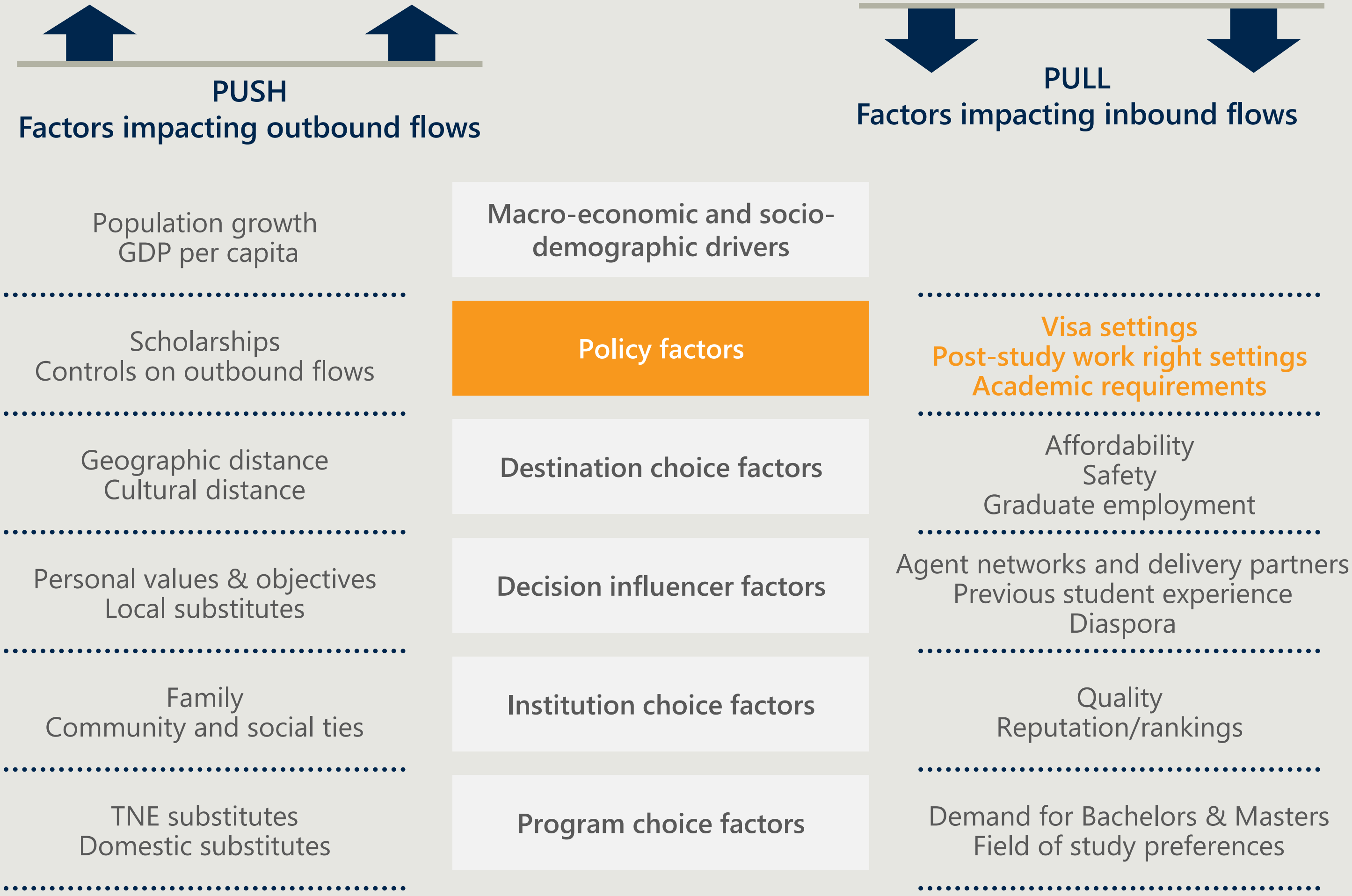
4. **Different markets react in different ways to changes in policy settings.** As an example, India is highly volatile with many changes in flows as destination preferences over the 12 year period. This is likely due to drivers in this market being tied to price, migration outcomes and the influence of agents on the market.

Section 1 – Differential global student mobility of destination countries

This sections outlines the basis for case selection and presents (at a high level) the differential performance of key destination countries on the four source countries the case study focuses on – India, Nigeria, Vietnam and South Korea.

Policy settings can have an impact on student mobility trends, however there are a range of environmental factors that influence student choice and global mobility

Analysis has focused on the policy settings of destination countries, but other factors will likely also have an impact



PUSH **Factors impacting outbound flows**		**PULL** **Factors impacting inbound flows**
Population growth GDP per capita	**Macro-economic and socio-demographic drivers**	
Scholarships Controls on outbound flows	**Policy factors**	Visa settings Post-study work right settings Academic requirements
Geographic distance Cultural distance	**Destination choice factors**	Affordability Safety Graduate employment
Personal values & objectives Local substitutes	**Decision influencer factors**	Agent networks and delivery partners Previous student experience Diaspora
Family Community and social ties	**Institution choice factors**	Quality Reputation/rankings
TNE substitutes Domestic substitutes	**Program choice factors**	Demand for Bachelors & Masters Field of study preferences

FOCUS OF RESEARCH

The primary focus has been on the policy factors of inbound countries and the impact this has on key bilateral and multilateral source-destination country relationships.

ANALYSIS LIMITATIONS

It is very difficult to isolate the impact of changes in policy settings on student mobility flows, with potential impacts by these other "push" and "pull" factors.

It is also difficult to assess the extent changes in mobility were the result of one destination country's policy, or may have been the result of changes in a competitor destination country.

Findings are presented with these limitations in mind.

Note: Full information on policy settings and alignment to changes in student mobility between source country and destination country are presented in **Appendix A – Destination country inbound flows, 2004 to 2018** and Appendix B – **Source country outbound flows, 2004 to 2018.** 'Push' and 'Pull' model has been adapted from Mazzarol & Soutar (2002) "Push-pull factors influencing student destination choice".

This case study focuses on the inbound-outbound relationships between key destination and source countries

Analysis has focused on the impact of the policy settings of destination countries on global mobility flows

The case study is focused on understanding material bilateral and multilateral relationships in international education

The case study seeks to understand the flows between key source and destination countries and the impact of changes in policy settings on the preferences of students, parents and agents, and the flow of students globally.

As a result, source countries and destination countries have been selected based on their relative sector importance

A series of key source countries have been selected which are key global markets and also have current significance or potential opportunities to Australia. The four source countries selected are India, Nigeria, South Korea and Vietnam.

These selections represent a cross-section of source countries, including source countries Australia performs well in, countries they do not, countries that are growing overall and countries that are declining overall. Industry insights have also been used to select countries where there has been a perceived policy impact in recent years.

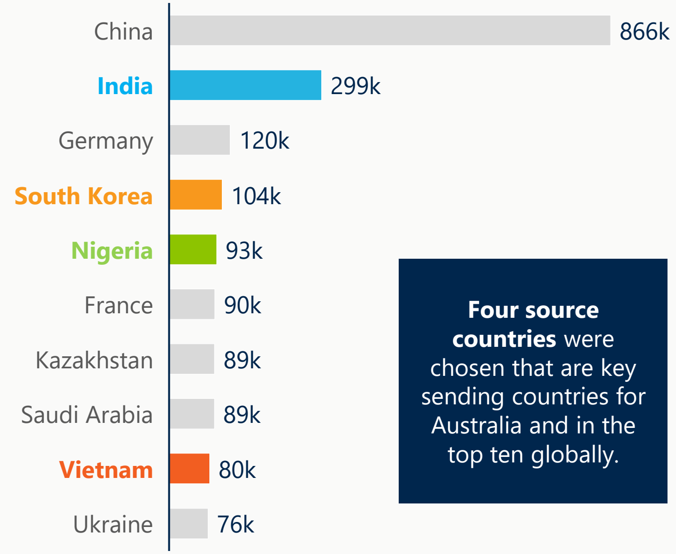
The four largest destination countries (all English speaking destinations) have been selected.

Primarily the focus of analysis has been on identifying key destination country changes and inbound trends

In developing the case study, a detailed scan of destination country policies from 2004 to 2016 was undertaken. While this is the primary focus of the research, where known, the research does comment on potential source country policies and factors that may have an impact on mobility trends.

Countries we are focusing on

Top ten international education source countries by outbound global mobility, 2016



Four source countries were chosen that are key sending countries for Australia and in the top ten globally.

The **four destination countries** of focus (United States, United Kingdom, Australia and Canada) make up almost four tenths of all international students globally.

Destination countries have different levels of performance on attracting flows from the four source countries of focus

	Source country			
Destination country	**INDIA**	**NIGERIA**	**VIETNAM**	**SOUTH KOREA**
AUSTRALIA	**Very strong recent growth,** from 2012, following the **2009 downturn** which it was highly impacted by.	**Flattened student numbers** in 2018, followed many years of **very high growth** (since 2012).	**Consistent growth** over a number of years – from 2004 to 2018, with some slowing from 2012.	**Declining student numbers** since 2011.
UK	**Significant decline** in student numbers from 2011 onwards.	Large flaws from Nigeria to the UK, but **flattening growth** since 2010 and **decline from 2015** onwards.	**Strong growth** up to 2016, but has experienced **declining student numbers** from 2016 onwards	**Minimal growth** across the past fifteen years.
CANADA	**High growth** across the period, with **very strong recent growth** from 2015 to 2017.	**Strong growth** over the period from 2004 to 2016, but a decline in the past **three years.**	**High growth** across the period, with **very strong recent growth** from 2015 to 2017.	**Moderate decline** across the past fifteen years.
USA	**Strong recent growth,** from 2015, following a **decline in numbers** from 2011 onwards.	**Very strong growth,** with some recent **slight slowing** of student numbers.	**High growth** across the period, with **acceleration in student numbers** from 2014 onwards.	**Declining student numbers** since 2011.

Note: Detailed information on global student flow, including changes in market share is presented in **Appendix A – Destination country inbound flows, 2004 to 2018.**

Section 2 – Impacts of policy settings on student mobility

This sections outlines the existing research on the impact of policy changes on student mobility and student preferences. It also identified key points of inflection in the relationship between source country student mobility and potential impacts of policy changes. Finally, the different risk factors that are used by destination countries in country-specific visa settings and at a high-level considers the reasons these differ.

There are a range of policy settings that can influence student’s preference for a destination

Changes in policies across the student experience can impact this preference and may have flow on effects for overall student mobility patterns.

Student considerations

“ *How onerous is the application process?*

What does my student visa entitle me to do?

How difficult is it for me to extend my visa or undertake further study/work?

What are my options for permanent migration? ”

Student journey →

APPLICATION PROCESS

Key policies may include:

- English language and academic requirements.
- Demonstration of financial capacity for study purposes.
- Vetting students as ‘genuine’.
- Processing times.

Changes to incentivise student may include: Fast-tracking applications through reduction in requirements on applicant/agent; increasing acceptance rates.

Changes to disincentivise student may include: Increasing the burden or length of the application process through increase demonstration of financial capacity or additional vetting processes.

VISA ENTITLEMENTS

Key policies may include:

- Work rights (time and type).
- Spouse and family.
- Travel restrictions while studying (inside and outside country).

Changes to incentivise student may include: Policies that increase the number of hours a student can work during their studies.

Changes to disincentivise student may include: Policies that place additional restrictions on students while they are studying – in terms of mobility or employment.

EXTENSION AND PATHWAYS

Key policies may include:

- Post-study work settings (type and length).
- Process for applying for further study.
- Employer sponsorship policies.
- Length of time able to stay post study.

Changes to incentivise student may include: Policies that increase length of time following graduation student can stay in country or ability of student to become employed in country.

Changes to disincentivise student may include: Not allowing student to work after study or burdensome processes for further study in the country.

MIGRATION OUTCOMES

Key policies may include:

- Pathways to permanent residency.
- Pathways to citizenship.

Changes to incentivise student may include: Policies that align student visa settings and pathway to permanent residency.

Changes to disincentivise student may include: Policies that restrict access to permanent residency or provide no opportunity for long-term stay.

Policies that are in place may also differ based on the source country the student is from (for example, through reduced application requirements based on risk).

Note: a more detailed assessment of existing settings for the four destination countries is presented in **Appendix C – Assessment of policy settings for destination countries.**

Policy changes align with many of the key changes in flows for the four source countries and four destination countries of focus

In these instances it appears that policies implemented resulted in flow on effects for the performance of other destination countries.

AUSTRALIA

2009. National downturn in international student numbers as a result of policy changes (including tighter rules on skilled migration) and other factors (safety, high dollar). India highly impacted and Vietnam growth slows. Flow on to **UK** and **Canada.**

2011. South Korea experiences decline from 2011 onwards. No clear link to policy settings.

2012. National recovery in international student numbers in line with implementation of policy changes (visa evidence and process, post-study work rights). Indian numbers grow as a result of decline in UK market. Nigerian numbers also grow.

2014. Decline in share of Vietnamese students, with flow occurring to the **US.** No clear policy impact.

2015 to 2017. Large growth in Indian and Nigerian students numbers. In part driven by policy related declines in the UK.

2017. Decline in Nigerian students tied to challenges with visa settings under SSVF .

UNITED KINGDOM

2009. Australian downturn results in increase in Indian students studying in the United Kingdom.

2012. UK changes visa settings following 2010 General Election resulting in decline in student numbers from India (with students flowing back to **Australia** and on to **Canada**).

Slowing of student numbers from Nigeria after strong growth from 2004 onwards (resulting in flow to **Canada,** and later the **US**). Vietnam continues to grow.

2013. Growth in Vietnamese students begins to decline following three years of strong growth. No clear policy link.

2015 onwards. Significant declines in students from India (result of visa settings and multiple periods of changes). Flow on to Australia and Canada.

Nigerians studying in the UK decline significantly and appear to be tied to the domestic recession but also policy settings – flow to **the US**.

CANADA

2009. Australian downturn results in increase in Indian students studying in Canada.

2011. Increase in students from Vietnam studying in Canada.

2012. Significant uptick in growth of Indian students studying in Canada based on UK policy settings.

2016 onwards. Favourable settings for post-study work rights results in significant increase in Indian students studying in Canada (from the UK), and increases in Vietnamese students (at expense of UK, US and Australia).

Nigerian numbers flat (flow to **the US**).

UNITED STATES

2011. Decline in numbers of students from Nigeria (flow on to Canada).

South Korea studying in the US. No clear link to policy settings.

2014. Accelerated period of growth for both Nigerian students (flow from the UK) and Vietnamese students (flow from Australia) studying in the US. Not clearly tied to US policy change.

2014 onwards. Significant growth in the numbers of Indian students studying in the United States, but in line with market growth and no evidence of clear policy impact.

2016 to present. Nigerian student numbers grow despite performance of others.

Note: More detailed analysis is presented in the appendices on changes in student mobility across the period from 2004 to 2018 for all destination countries (see **Appendix A** and **Appendix B**)

Four ‘areas of focus’ have been selected based on this for further analysis

These are explored in further detail on the pages that follow.

The four ‘areas of focus’ are:

Focus area 1- Ongoing instability in Indian mobility, 2005 to 2018

Framed around the source country

Focus area 2- Strong UK performance in Nigeria and subsequent outbound decline, 2004 to 2018

Focus area 3- Increased uptick in students studying in the United States, 2014

Framed around the destination country

Focus area 4- Positive policy settings introduced by Canada resulting in recent growth, 2016 onwards

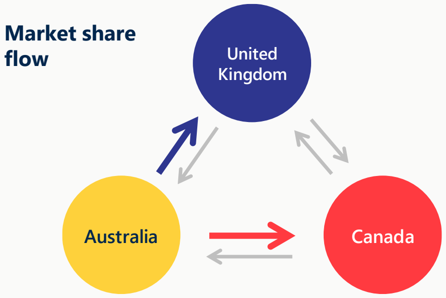
Each focus area case study provides information on the nature of the policy change, the impact on student numbers and flow on effects to other destination countries.

Section 3 – Case study on key ‘area of focus’

This sections looks in further detail at the four ‘areas of focus’ identified, to assess the impact of policy changes on total students and the flow on effects to other destination countries.

INDIA, 2005 to 2018 | Focus area 1

Policy changes from multiple countries have driven policy instability over the past ten years. There have been three distinct phases (outlined below and analysed in the detail on the pages that follow)

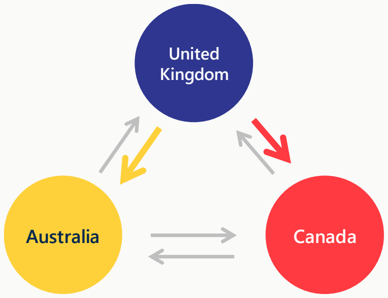


2009 to 2012

Phase A: Australian downturn in 2009, results in net losses to UK and Canada

In part the Australian downturn was a result of policy changes – namely the introduction of **tighter rules for skilled migration.** In the same year, the UK also introduced post-study work rights in line with other destination countries.

Australia sharply loses market share (15% to 6%) and experienced a net decline of 15,000 students from 2009 to 2012. The UK benefits with growth in increased share from 14% to 19%, as does Canada (2% to 4% share).



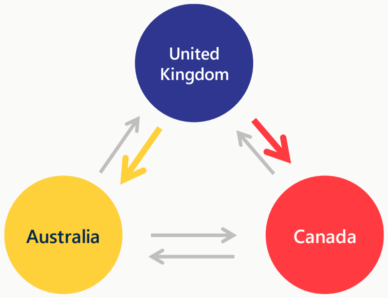
2012 to 2016

Phase B: UK changes to visas result in decline; Australia and Canada benefit

Changes to the UK policy settings following the 2010 General Election include stricter immigration controls. This includes reduction in closing of post-study work rights introduced and tighter visa settings.

Australia also reverses policies implemented in response to the 2011 *Knight Review*.

UK loses share back to Australia (13% loss in market share), but Canada again gains ground (4% to 7% share)



2016 to present

Phase C: Favourable Canadian settings results in further gain in share

Canada has introduced a series of targeted policies to the Indian market. In contrast, on top of Brexit, the UK introduced tougher visa rules and removed post-study work rights (2016) and did not include India in relaxed visa rules (2018).

While full comparable data is not yet available, initial data indicates that Canada (and Australia) have significantly outgrown the UK in this most recent period.

Winners and losers... Canada was the net winner over this period – increasing share from 2% to over 7%, or an additional 18,000 students from 2004 to 2016. **UK** was most impacted over the period (down to 6%). **Australian** student numbers increased (+30,000), but its share did not.

Note: The United States also experiences a decline in market share over this period (from 62% to 45%) and also experienced the largest net increase in total numbers (+55,000 students from 2004 to 2016), however as these are not clearly tied to policy settings they have not been called out in detail in the case studies.

Phase A: Australia's 2009 downturn | Impact on Indian student flows up to 2012

Australian policy changes, as well as other external factors, had a large impact on the number of Indian students studying in Australia and resulted in increased numbers studying in both the United Kingdom and Canada where more favourable settings were in place.

What was the policy change?

Australia introduced two changes in response to increasing concerns about links between study and migration:

1. Reduction in skilled stream of Australia's Migration Program (2009).
2. Introduction of reforms to skilled migration (February 2010), which decoupled student visas to other migration outcomes, such as PR.

What were the other environment factors that could have had an impact?

There were a number of other factors that impacted Australia's relative attractiveness as an education destination, namely:

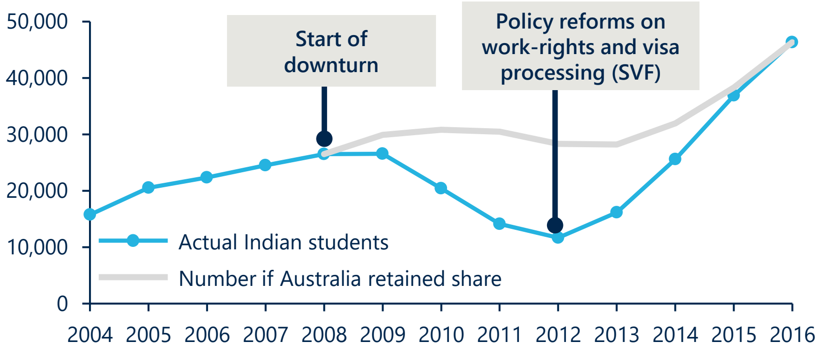
- High Australian dollar
- Violence against Indian students in Melbourne in 2009
- Changes to visa settings made in 2005

In addition to the two key policy changes, these are outlined in the 2011 *'Knight Review'*.

Additionally, the UK introduced a favourable post-study work visa in 2009 , offering two years of work following study bringing their policy position in line with other key destination countries – such as Australia. Canada also made changes to visa processing practices.

Overview of change in student mobility

Number of Indian tertiary students studying in Australia and impact of policy changes, 2004 to 2016



Australia market share (%)	16%	15%	10%	6%	12%	15%

What was the impact of Australia's policy change?

- The decline occurred for **three years**, until student numbers recovered from 2012 onwards.
- From peak to through, Indian student numbers **declined over 55%** or almost **15,000 less students** in 2012 than 2009.
- Even with strong recent growth since 2012, Australia's share of all global Indian students only **returned to pre-downturn levels in 2016**.
- If market share had been maintained at 15% over the period, there would have been an additional **66,000 Indian enrolments** studying in Australia.
- While **India's total outbound mobility actually declined** from 2010 to 2014 – it is not clear the extent this was as a result of the Australian decline or due to internal economic factors.

Were there flow on effects to other destination countries?

There was a clear flow on effect of Australia's decline in Indian student to other countries – in particular the UK and Canada.

Over the period Australia's market share declined 8 percentage points (p.p.) – from 14% share to only 6%.

The UK picked up most of this share going from 14% share to 19% share (or 12,000 additional students from 2008 to 2011). Canada gained the rest (doubling Indian numbers to 10,000 and share from 2% to 4%). This indicate a likely substitution effect to these countries.

Total mobility out of India also decreased during this period. This lasted three years and the total net decline was comparable to that experienced by Australia (around 15,000 students). The direction of causality can not be determined.

Did other source countries experience the same mobility change?

The downturn was not as significant for other source countries of focus. Growth for Vietnam and Nigeria both slowed (but continued to be positive). The policy may have impacted Indian mobility more as it focused on post-study work rights and migration pathways.

Was there a differential impact on providers?

While the impact on providers varied, there was not a clear pattern to this. On average, sector Indian enrolments declined almost 60% from peak to trough. Three of the four Go4 universities were in the twenty universities impacted more than the average.

Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from HEIMS. Department of Parliamentary Services (2016) 'Overseas students: immigration policy changes 1997-2015'.

Phase B: UK tightening policy settings | Impact on Indian student flows up to 2016

Implementation of restrictive UK policy settings and turnaround on Australia's visa policy leads to reversal of student flow to the UK in 2009; Canada again increases their inbound student numbers as a direct result of the changes.

What was the policy change?

The United Kingdom implemented changes in its immigration settings following the 2010 General Election – where net migration was a key policy issue for the successful Conservative Party. Key subsequent policy changes included:

1. Tighter visa settings for international students.
2. Closing the post-study work rights for international student that had been introduced in 2009.

What were the other environment factors that could have had an impact?

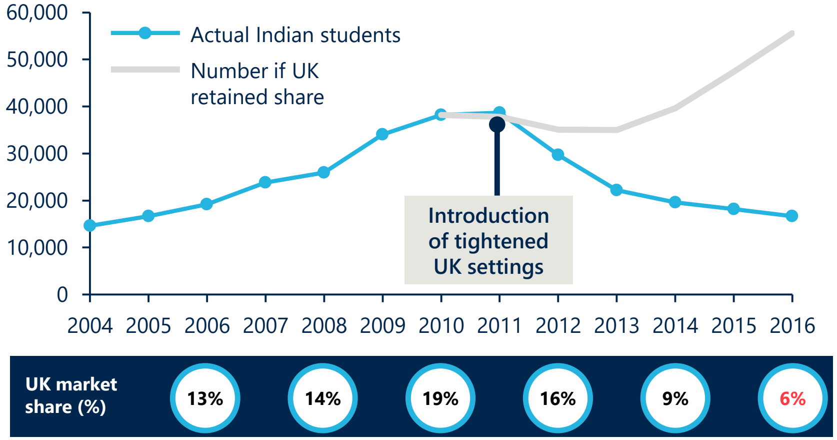
In 2012 onwards Australia reversed many of its policies as it introduced the recommendations of the Knight Review (2011). This included:

- access to streamlined visa processing arrangements
- enhanced post-study work options
- reduction of visa financial requirements.

In parallel with UK changes, this would have impacted the relative attractiveness of the two destinations.

Overview of change in student mobility

Number of Indian tertiary students studying in United Kingdom and impact of policy changes, 2004 to 2016



Introduction of tightened UK settings

What was the impact of the United Kingdom's policy change?

- The decline has occurred for **five years**, with student numbers returning to growth in 2017 (based on HESA numbers)
- From peak to through, Indian student numbers **declined over 55%** or almost **22,000 less students** in 2016 than 2011
- In 2016, UK's share of total global Indian student mobility was at 6% compared to 19% only five years previous.
- If market share had held at 19% up to 2016, the UK would have received an additional **105,500** commencements in that five year period.
- The commencement of the UK's downturn aligned with a **decline in Indian outbound student mobility** from 2010 to 2014 – but UK numbers have only just recovered in the past two years.

Were there flow on effects to other destination countries?

There was a clear reversal of the previous mobility shift from Australia to the UK that occurred in 2010 as a result of the policy introduction. Canada also benefited from the global mobility shift.

From 2012 to 2016, the UK market share went from 19% of all outbound Indian students to only 6% share – or a 13 p.p. decline.

There was a clear substitution effect with Australia which regained much of the share it had lost following its own policy changes (gaining 8 p.p.). This may indicate a positive impact of the policy changes it made in response to the *Knight Review (2011)*. This contrasted with the UK, where further unfavourable policy changes have resulted in further decline in numbers. In contrast to the UKs net decline of 22,000, Australia had a net increase of 32,000.

Canada again benefited from the policy change of another country (and its own comparative policy settings) with a net increase of over 11,000. This represented an increase of 4 p.p. – going from only 2% in 2009 to 7% of all outbound Indian students in 2013.

Did other source countries experience the same mobility change?

The policy change did impact Nigeria but not to the same extent as India. Nigeria had a slowing of growth of 14% CAGR for three-years prior compared to 2% CAGR for three years following) but no actual decline. Nigeria is now the same sized market as India for the UK. Vietnam actually grew through the period.

Phase C: Canada’s targeted policy settings | Impact on Indian student flows after 2016

Favourable Canadian policy settings since 2016 has resulted in further increase in market share of Indian students, while the continued direction of UK settings appears to have led to further declining performance.

What was the policy change?

Over the past three years **Canada** has:

- Introduced a **path to permanent residency for international students**, with more points awarded to those that have completed post-secondary studies in Canada (2016).
- Introduced a **streamlined visa process** – Student Direct Stream (SDS) for students from four Asian source countries (including India and Vietnam-2018).

In contrast, over the past three years the **United Kingdom** has:

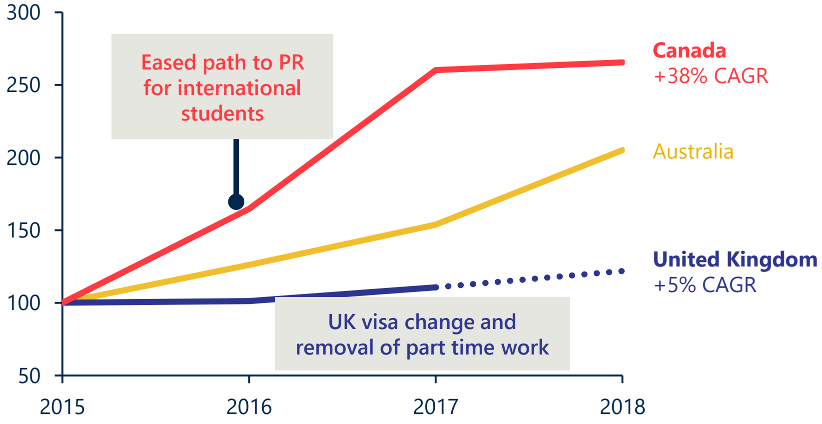
- Introduced NHS fees for migrants (including international students studying in the UK) (2015).
- Removal of part-time work rights for international students, tougher visa rules and requirements for increased demonstration of financial capacity (2018).
- Relaxed Tier 4 (university) visa rules, but excluded India, Nigeria and Vietnam from this.

What were the other factors?

These policy changes are also occurring with the backdrop of ‘Brexit’ – with the vote to leave the EU occurring in 2016.

Overview of change in student mobility

Number of Indian higher education students studying in United Kingdom, Canada, Australia and the United States, 2015 to 2018 (index = 2015)



While UK has begun to recover in recent years its growth has been minimal compared to Canada – which has more favourable settings in place.

What is the potential impact of Canada’s policy change?

- While accelerating over the full period, Canada’s growth of Indian students appears to have accelerated since the introduction of the 2016 change – from 20% CAGR from 2012 to 2015, and 38% CAGR from 2015 to 2018 (although the most recent year has been flat).
- If Canada had continued to grow at the 20% rate – it would have had approximately 10,000 fewer Indian students in 2018.
- It should be noted that figures appear to have flattened from India to Canada from 2017 to 2018.

Were there flow on effects to other destination countries?

The change for the other two key destination countries has been larger than the UK, but not as significant as Canada.

- **Australia** – has grown in Indian enrolments, but lower than the rate for Canada (+27% CAGR compared to 38% from 2015 to 2018). It is not clear that the change from SSVF ranking from Level 3 to Level 2 in 2017 had a significant impact on inbound mobility.
- **United States** – has also grown in Indian enrolments but lower than the rate for Canada (+14% CAGR from 2015 to 2018).

This may indicate that positive settings in place in Canada have resulted in further recent growth.

What changes are we waiting to see?

Due to delays in release of enrolment data, the impacts of the following are not yet clear:

- Brexit (UK) – with 2018 enrolment data not yet available to Nous.
- Introduction of Student Direct Scheme in 2018 (Canada) – which provided a streamlined process specifically for students from India.
- Abolishment of 457 visa and introduction of regional visas (Australia) – with impacts of these likely to be seen in late 2019 intake figures.

Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from HESA, IIRC and Austrade MIP data. Note: Canada growth rate refers to increase in study permit holders, while UK refers to enrolments. Growth figures can not be contextualised through total outbound mobility for these countries as the most recent reported figures available through UNESCO are for 2016.

INDIA 2005 to 2018 | Focus area 1

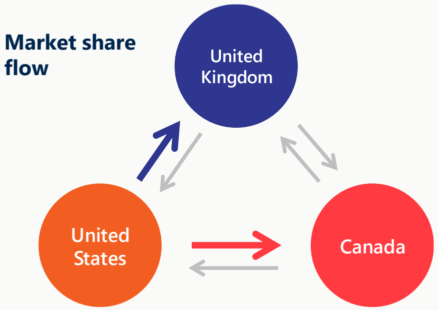
Summary of policy changes during the three phases

Phase and year	Mobility changes	Australia policy changes	United Kingdom policy changes	Canada policy changes	Commentary
Phase A: Australian downturn in 2009, results in net losses to UK and Canada **2009 to 2012**	• Australia **decreases share** (15% to 6%) • UK **increase share** (14% to 19%) • Canada **increases share** (2% to 4%)	• Changes to student visa settings for international students, 2005 **(No immediate impact)** • Introduction of tighter rules for skilled migration **(Negative impact)**	• Introduction of post study work visa – with two years in line with other destinations, 2009 **(Likely positive impact)** • Migration numbers key Conservative Party election issue in 2010 **(No immediate impact)**	• Student Partners’ Project launched making application process easier (2009) **(Impact not clear)**	Australia significantly loses market share due to change in policy settings, with gains by the UK and Canada. Indian overall outbound mobility also declines during this period.
Phase B: UK changes to visa settings result in UK decline, with Australia and Canada benefiting **2012 to 2016**	• UK **loses market share** (19% to 6%) • Australia **fully regains share** (6% to 15%) • Canada again **increases share** (4% to 7%)	Introduction of *Knight Review* recommendations, including: • Streamlining of visa process (2012) • Introduction of post-study work rights (485 visa) (2013) **(Likely positive impact)**	Introduction of strict immigration laws, including: • Changes to student visas • Ability to work during study • Closing post-study work rights (introduced in 2009) **(Negative impact)**	• Change so that automatic authorisation work rights during study (2014) **(Impact not clear)**	UK loses share based on policy settings. This flows back to Australia who have reversed their negative policy settings, with the flow to Canada also increasing.
Phase C: Favourable Canadian settings result in further gain of share **2016 to present**	• Canada **grows** at 38% per annum • Australia **grows** at 27% per annum • UK grows, but lower growth rate will mean **further declining share***	• India SSVF rating goes from L3 to L2 – resulting in increased streamlined process for many (2017) • 457 Temporary Skilled Worker visa abolished (2018) • Regional post-study work rights (2019) **(Impact not clear)**	Significant UK policy changes including: • Removal of part-time work rights • Tough visa rules – including increased demonstration of financial capacity • Brexit referendum (2016) • India not included in relaxed visa rules introduced (2018) **(Negative impact)**	• Path to permanent residency eased for international students (2016) • Introduction of streamlined visa process (Student Direct Scheme) for Indian students (2018) **(Likely positive impact)**	Favourable policy settings targeted to Indian students by Canada appear to drive further growth.

Note: *Comparable data is not available from 2016 onwards to assess change in market share. The United States also experiences a decline in market share over this period, however as these are not clearly tied to policy settings they have not been called out in detail in the case studies. From 2009 the United States declined from

NIGERIA 2004 to 2018 | Focus area 2

The United Kingdom dominated market growth from 2004 to 2014, but policy changes may have resulted in increasing flows to the United States

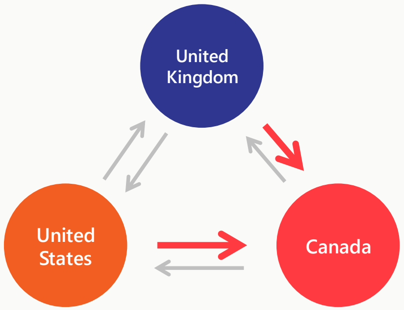


2004 to 2011

Phase A: Nigerian student mobility growth is to the UK, while US numbers flatline

Despite having a similar number of students in 2004 (around 6,000), Nigerian mobility to the United Kingdom grew consistently at 10% CAGR or a net increase of 11,000 over the next 10 years. In contrast, there was no growth in Nigerian students for the US up to 2014.

The policy reason for this difference in growth is not clear based on a desktop review, and therefore may be related to other factors such as recruitment efforts.

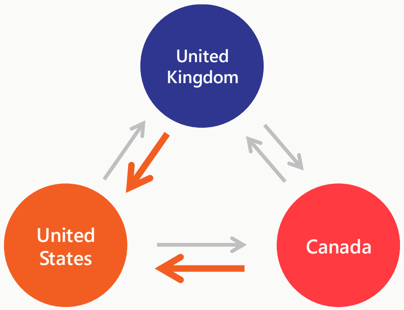


2011 to 2015

Phase B: UK changes to visas result in decline; Canada benefits

Changes to UK policy settings following the 2010 General Election (as outlined in previous case study) impact relative attractiveness of the UK as a destination.

UK's numbers flatten, resulting in declining share – over 30% in 2011 compared to less than 20% in 2015. Canada is the big winner going from 2.5% to 6.5% share of all Nigerian students.



2016 to present

Phase C: Impacts of recession result in overall decline for many countries

From 2016 onwards, total outbound numbers are affected by the impact of the recession in Nigeria. Overall outbound mobility appears to be flattening.

UK numbers have declined from 2015 (>15% CAGR), while Australia and Canada have been flat.

US numbers are growing despite others performance.

Winners and losers… The **United Kingdom** and **Canada** have been the big winners since 2004 – both with a net increase of over 5,000 from 2004 to 2016. Recent **US** growth does however indicate potential continued future growth. **Australia** has not captured this growth.

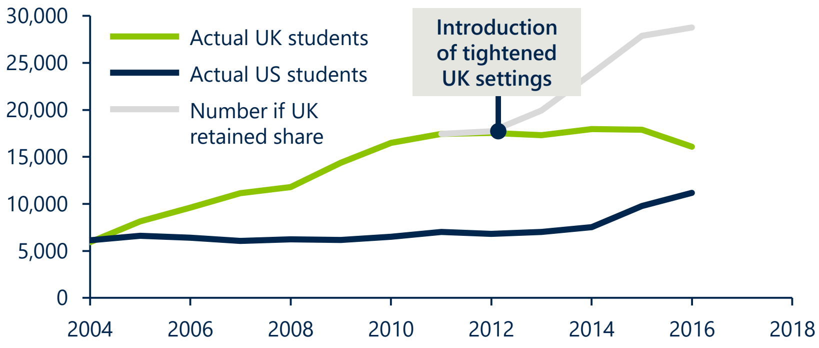
Note: Australia has not been represented in this case study given the comparatively small number of Nigerian students that study in Australia – less than 2% of all Nigerian students in 2016. Australia did experience net growth of approximately 1,500 enrolments between 2004 and 2016.

Phase A and B: UK growth and policy change

UK policy setting changes in 2011 appear to impact years of growth resulting in shift in preference to Canada.

Overview of change in student mobility

Number of Nigerian tertiary students studying in United Kingdom, and the United States, 2004 to 2015



Introduction of tightened UK settings

UK market share (%)	22%	30%	30%	33%	31%	23%	17%

What led to the difference in performance from 2004? (Phase A)

- The reason for the differing performance from 2004 onwards between the US and the UK is not clear. It is possible that this differential performance was because more favorable settings were in place in the UK, but further research may be required to understand this.

What is the potential impact of the UK's policy change in 2011? (Phase B)

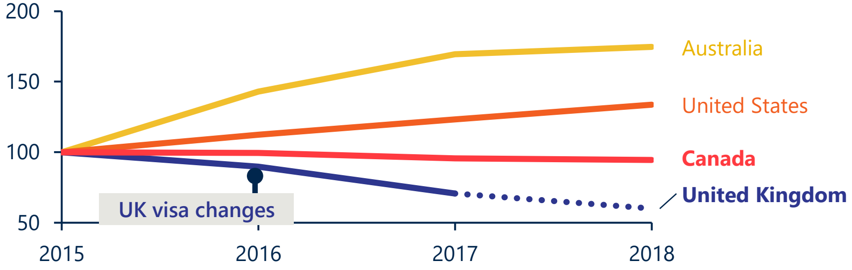
- Following introduction of tighter settings in 2011, numbers of Nigerian students to the **UK flattened entirely till the decline in 2015.**
- If UK had maintained share over this **four year period** (at 30.8%), there would have been an **additional 31,000** Indian enrolment studying in the UK.
- There was a clear flow of effect to Canada – who picked up share (+2p.p.).

Phase C: Recession and decline

Nigeria's financial challenges have impacted most countries, but UK policy changes have also had an impact on numbers.

Overview of change in student mobility

Number of Nigerian higher education students studying in United Kingdom, Canada, Australia and the United States, 2015 to 2018 (index = 2015)



UK visa changes

Flows between destination countries

- The 2015 recession and increasing internal pressures on Nigerian scholarships likely impacted Nigerian outbound mobility from 2015. Initial available outbound figures points to a significant slowing of growth from 2015 to 2016.
- The UK was the largest market and most impacted by the downturn, with a reported 30% decline (-5,550 net enrolments) in numbers from 2015 to 2017. Changes to UK policy settings in 2015 and 2016 may have contributed to this. Canada's numbers also dropped.
- Australia benefited with increases from a low base (+800 net enrolments), but subsequent increase in risk has resulted in a flattening (2017 to 2018). The US has also recovered with an additional 3,000 students studying in 2018 compared to 2015.

What changes are we waiting to see?

The impacts of some policy changes are not yet fully captured in the data:

- Full impact of SSVF visa change (Australia) – and the response of Australian universities in managing their risk. The impact of the abolishment of 457 visa is likely to be seen in late 2019 intake figures.
- Exclusion of Nigeria from relaxed visa settings (UK) – with any potential impact not likely to be seen till UK's 2018-19 (or even 2019-20) academic year.
- 'Muslim travel ban' (US) – with the full impact of this expected in 2019 numbers.

Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from HESA, IIRC, Open Doors and Austrade MIP data.

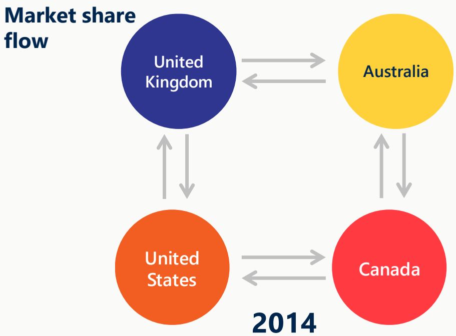
NIGERIA 2004 to 2018 | Focus area 2

Summary of policy changes during the three phases

Phase and year	Mobility changes	United Kingdom policy changes	Canada policy changes	US policy changes	Australia policy changes	Commentary
Nigerian student mobility growth is to the UK, while US numbers flatline **2004 to 2011**	• UK **increase share** (22.5% to 31%) • US share **decreases** (23% to 12.5%) • Canada **increase** from low base (2.5% to 3.6%)	• Policy changes from around 2004 or prior that may have had an impact are not clear • Introduction of post study work visa – with two years in line with other destinations, 2009 **(No impact)**	• No clear policy changes	Immigration policies tightened following 9/11 impacting international student numbers Specific policy impact from 2004 (or prior is not clear)	• n/a	Reason for the difference in performance between the US and UK from 2004 can not be clear attributed to a policy change.
UK changes to visas result in decline; Canada benefits **2011 to 2015**	• UK share **decreased** (from31% to 20%) • Canada **increases** (3.5% to 5.5% • US is flat with minimal change	Introduction of strict immigration laws, including: • Changes to student visas • Ability to work during study • Closing post-study work rights (introduced in 2009) **(Negative impact)**	• Change so that automatic authorisation work rights during study (2014) **(Impact not clear)**	No clear key policy changes	• n/a	UK numbers flatten based on introduction changes to policy settings, resulting in lost market share to Canada (and others).
Impacts of recession result in overall decline for many countries **2015 to present**	• UK numbers **decline** (-16% CAGR) • Canada **declines** • US numbers **grow** (+10%) • Australian numbers up then down	Significant UK policy changes including: • Removal of part-time work • Tough visa rules – including increased demonstration of financial capacity • Brexit referendum (2016) • Nigeria not included in relaxed visa rules introduced (2018) **(Negative impact)**	• Path to permanent residency eased for international students (2016) **(Impact not clear)**	No clear key policy changes	• Change in SSVF rating for Nigeria impacting recruitment (2017) • 457 Temp. Skilled Worker visa abolished (2018)	Several countries policy settings adjusted following recession (including Aus. SSVF rating and UK settings). Increase to US may be in response to this. It is not clear if US specific policies had an impact.

Inbound students to the United States 2014 | Focus area 3

The United States experienced an uptick in three of the four source countries of focus (India, Nigeria and Vietnam). There is not a clear policy driver for these changes, indicating it may just reflect broader popularity for the United States as a destination.



2014

No consistent shift between destination countries

Key point- Despite US uptick, these came from a number of direction based on source country or aligned to market growth

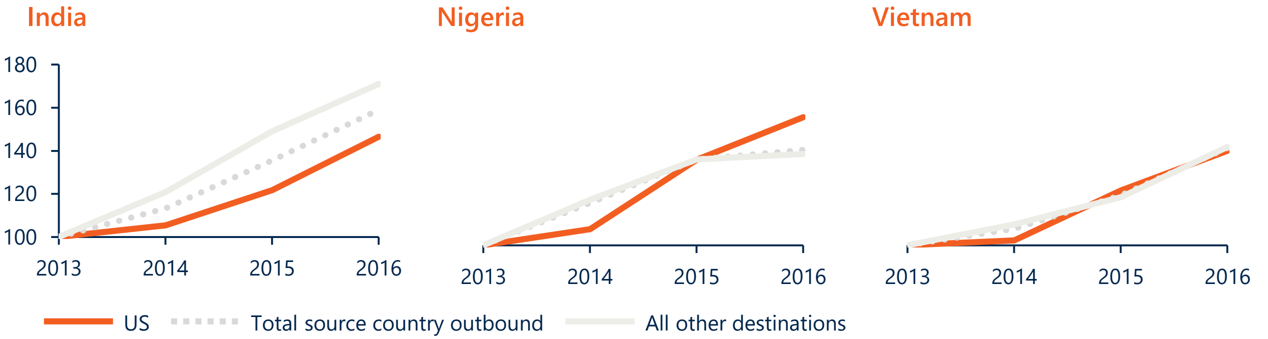
The United States experienced a substantial uptick in student mobility in 2014 from three of the key source countries – India, Vietnam and Nigeria.

Despite this strong increase, the United States market share did not change significantly across all three source countries (shown right).

This indicates the uptick likely represented outbound flows (internal factors in the three countries) as opposed to increased inbound mobility as a result of policy changes.

Overview of change in student mobility

Number of tertiary students studying in the United States and total outbound students (by country), 2013 to 2016 (index = 2013)



What was the extent of the change in US enrolments in 2014?

The number of Indian students studying in the US **declined up to 2014** (-2% CAGR), **but grew 18% in the two-years following.**

Nigerian student numbers in the US **grew slowly up to 2014** (+3%), but **grew quickly following it** – almost 20% per annum.

Vietnamese student numbers in the US **grew slowly up to 2014** (+2%), but **rapidly grew in the next two years** –22% per annum.

Was there any flow effect between destination countries?

The US's **share remained consistent** at around 45%. Australia's share increased at the expense of the UK.

US did gain share (from 11% to 12% from 2013 to 2015) in line with declines **from the UK** (27% to 20% in same period.

US's share increased from **27% to 29%**, while **Australia experienced a comparable net decline** (22% to 19%).

Could any policies have contributed to this?

There are no clear policies that would have continued to this performance, and growth instead appears aligned with increasing outbound numbers.

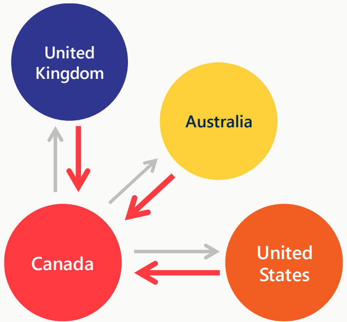
Decline in UK performance which had flow on effects likely due to **policies introduced in 2011** and further changes in 2015. No clear reason for US upturn (as opposed to Canada or Australia).

Reason for Australian decline and flow on to US between 2014 and 2015 **not clear.** Australia implemented positive policy changes in this period.

Canada targeted policy settings result in growth 2016 onwards | Focus area 4

Canada experienced strong growth from 2016 onwards in two key Asian countries – India and **Vietnam.** The growth aligned to change in PR pathways and subsequent visa processing changes. This page focuses on **Vietnam.**

Market share flow



2016 onwards

Key point. Canadian quickly grows number of Vietnamese students while others falter.

Canada had a significant increase in the number of Vietnamese students studying in Canada – with an increase of 9,000 study permits issued to Vietnamese students from 2015 to 2018, or a 58% CAGR over the period.

In contrast, UK numbers declined, and while US and Australian numbers increased, it was not near to the same extent as Canada experienced.

This growth aligned with the introduction of a clearer path to PR for international students in 2016 and a later streamlining of the visa application process for Vietnamese students. Policy settings in the UK made stricter.

What were Canada's policy changes?

Over the past three years **Canada** has:

- Introduced a **path to permanent residency for international students**, with more points awarded to those that have completed post-secondary studies in Canada. (2016)
- Introduced a **streamlined visa process** – Student Direct Stream (SDS) for students from four Asian source countries (including India and Vietnam). (2018)

How did UK policy settings compare?

In contrast, over the past three years the **United Kingdom** has :

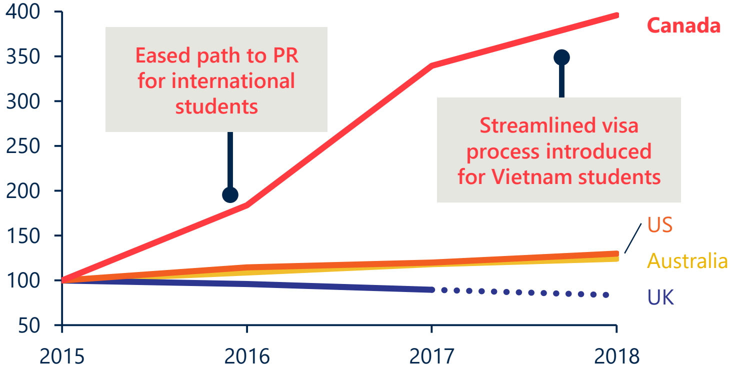
- Introduced NHS fees for migrants (including international students studying in the UK). (2015)
- Removed of part-time work rights for international students, tougher visa rules and requirements for increased demonstration of financial capacity. (2018)
- Relaxed Tier 4 (university) visa rules, but excluded India, Nigeria and Vietnam from this.

This follows previous changes – including the removal of post-study work rights in 2011.

These policy changes are also occurring with the backdrop of 'Brexit' – with the vote to leave the EU occurring in 2016.

Overview of change in student mobility

Number of Vietnamese higher education students studying in United Kingdom, Canada, Australia and the United States, 2015 to 2018 (index = 2015)



Eased path to PR for international students

Streamlined visa process introduced for Vietnam students

What was the extent of flow from other countries?

There was a clear flow on from declining numbers in the UK – net decline of 400. However, it appears that most of the growth has come from Canada performing better in a growing market. The net increase of Australia (+3,000) and the US (+5,600) were smaller than the +9,000 of Canada.* Canada therefore gained share (and Australia and US lost share) while others were grew overall numbers.

What was the potential impact of the policy change?

If Canada had continued to grow at the 15% CAGR rate from 2015 to 2018 – it would have had approximately 2,000 fewer Vietnamese students in 2018.**

The impact on student numbers is also more likely to be identified in reported 2019 numbers rather than 2018 numbers.

Source: Nous global student flow integrated dataset Layer 3, from HESA, IIRC, Open Doors and Austrade MIP data. *Note given these are from different national sources there may be some small definitional differences between the sources. ** The impact of the policy change in 2016 is difficult to identify as incomplete 2017 and 2018 UNESCO figures mean that it is not possible to understand the overall outbound student numbers from Vietnam for those years (and therefore Canada's share of growth).

Appendix A – Destination country inbound flows, 2004 to 2018

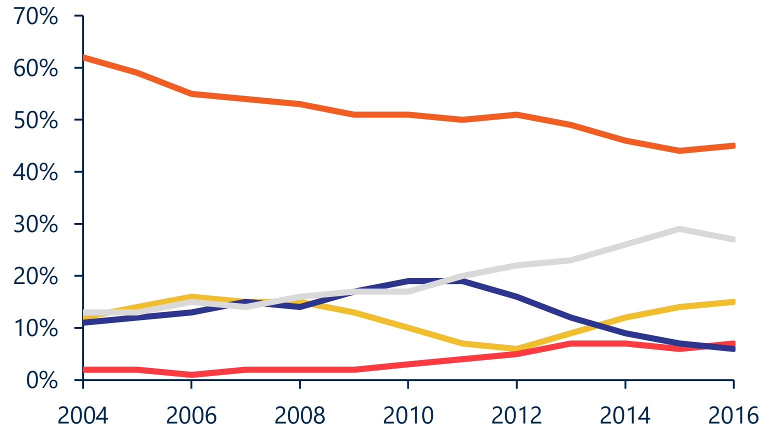
This section outlines a full summary of key policy changes and student mobility shifts from the perspective of the four destination countries of focus (Australia, the United Kingdom, the United States, and Canada) from 2004 to the most recent enrolment data available.

Share of key source countries have changed over the period from 2004 to 2016

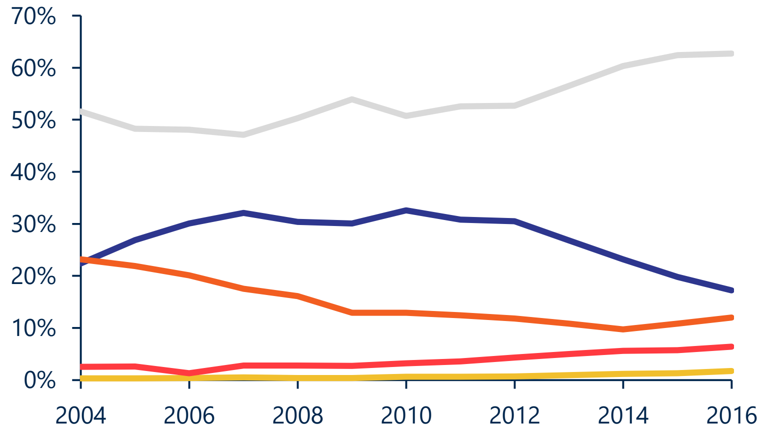
Summary of change in market share over time for key destination countries

▬ Australia
▬ Canada
▬ United Kingdom
▬ United States
▬ Other

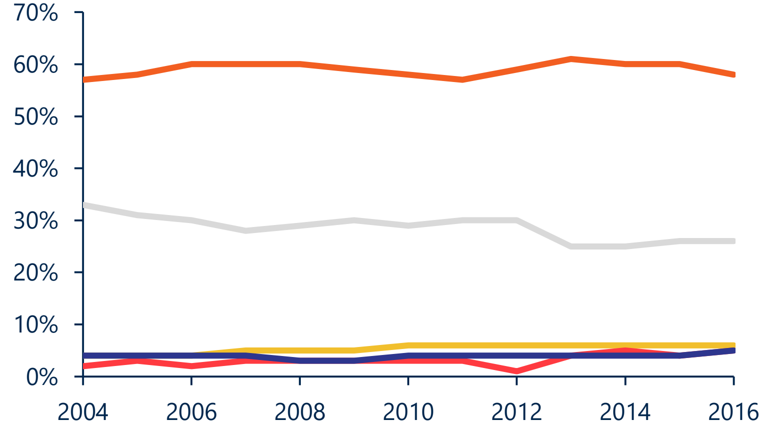
Share of all outbound INDIAN tertiary students, 2004 to 2016



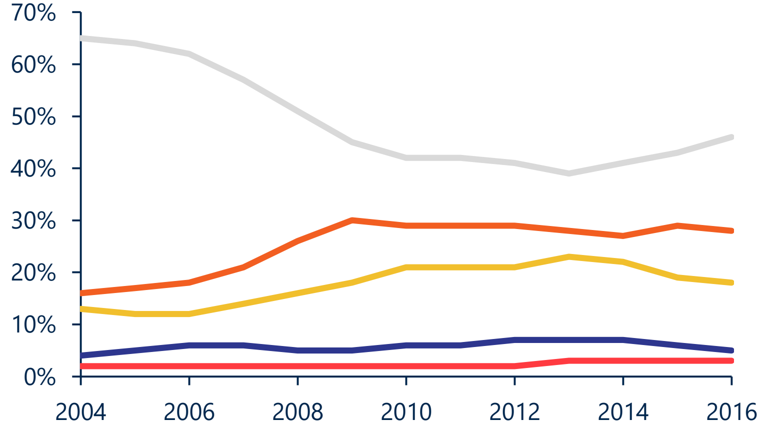
Share of all outbound NIGERIAN tertiary students, 2004 to 2016



Share of all outbound S. KOREAN tertiary students, 2004 to 2016

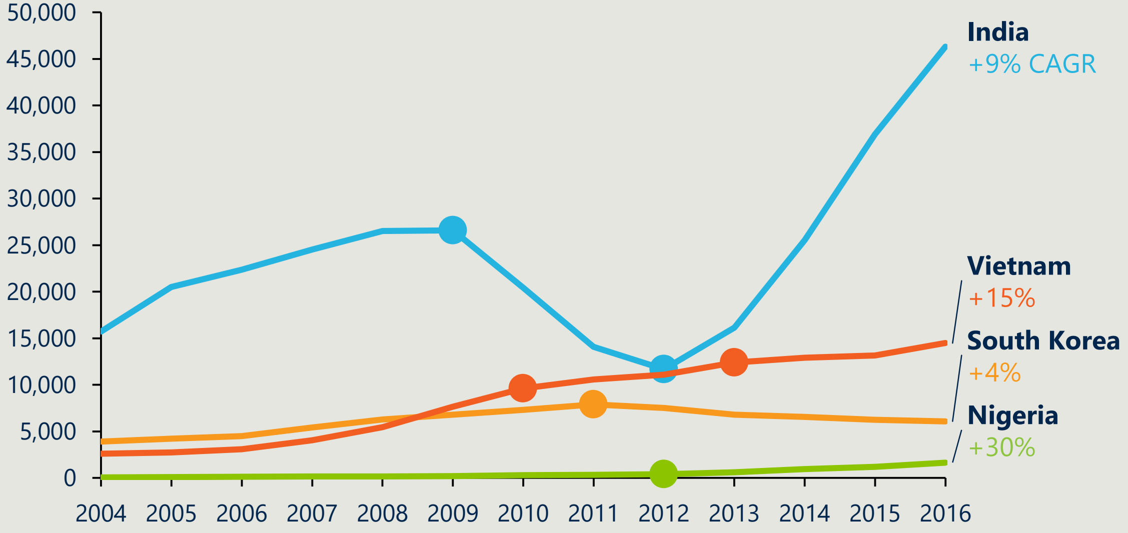


Share of all outbound VIETNAMESE tertiary students, 2004 to 2016



Australia (as a destination)

Tertiary student mobility into Australia, by source countries of focus, 2004 to 2016



Recent HE trends based on most recent data

+27% CAGR
for enrolments from India from 2015 to 2018

+7% CAGR
for enrolments from Vietnam 2015 to 2018

-4% CAGR
for enrolments from South Korea from 2015 to 2018

+20% CAGR
for enrolments from Nigeria from 2015 to 2018 (albeit flat in past year)

Timeline of significant policy changes

2005 Changes to Australian student visa settings for Indian students

2007-08 Global Financial Crisis

2009 Student violence in Melbourne

2010 Student visa review in Australia – the ‘Knight Review’

2010 Tighter rules for skilled migration introduced

2012 Streamline visa process for 29 countries

2013 introduction of post-study work visa (485 visa)

2014 International education strategy launched

2014 Streamlined student visa (SSV) introduced in 2014 for HE student, including reduced financial demonstration requirement

2016 Introduction of Simplified student visa framework (SSVF) in Australia in July 2016

2017 India changed from SSVF L3 to L2 – a more moderate risk by Australia

2018 457 Temporary Skilled Worker visa abolished

2019 One year post-study work rights extension for students studying in regional areas

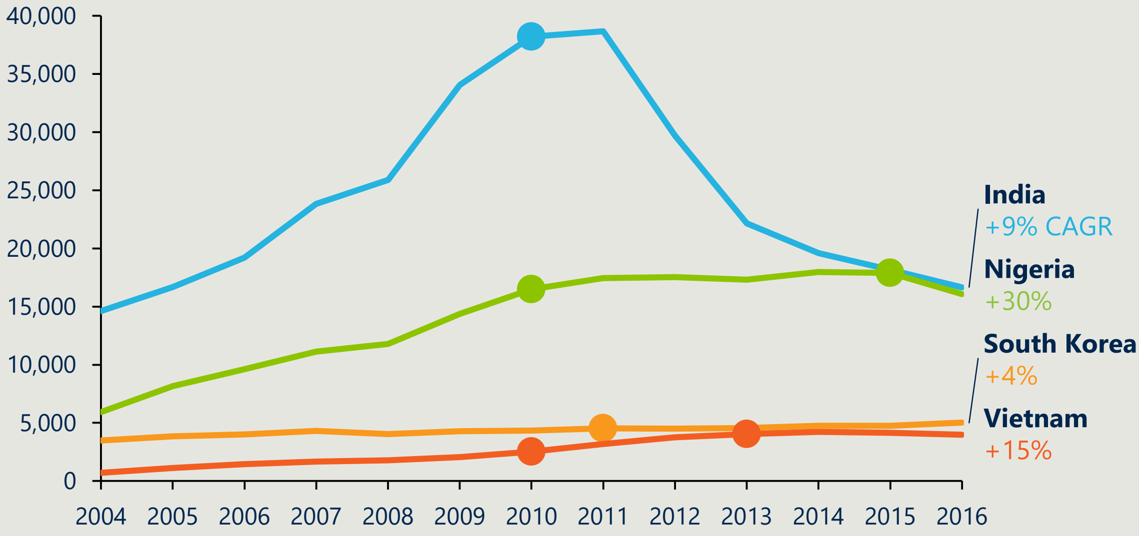
Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, based on Austrade MIP enrolment data. Department of Parliamentary Services (2016) ‘Overseas students: immigration policy changes 1997-2015’.

Summary of key insights

- Inbound student numbers to Australia experienced a downturn from 2009 onwards with a significant decline in student numbers (a decline of over 21,000 students from 2009 to 2013).
- The downturn was a combination of external factors (GFC, violence against students) and policy changes (Skilled migration).
- Growth subsequently has been strong at over 10% per annum.
- **India** was the only of the four destination countries (and more affected than all source countries) to be significantly impacted by the 2009 downturn, but subsequent growth has been very high (>30% CAGR). **KEY POINT OF INFLECTION 1**
- **Vietnam** has consistently grown since 20014. Growth from 2012 has however been slower.
- **South Korea** experienced a decline from 2011 (downturn – with potential policy impact).
- **Nigerian** numbers grew markedly throughout the downturn and subsequently – but are relatively small for the global market size. Flat growth in past year – may indicate impact of SSVF change and/or domestic economic recession. **KEY POINT OF INFLECTION 2**

United Kingdom (as a destination)

Tertiary student mobility into the UK, by source countries of focus, 2004 to 2016



Recent HE trends based on most recent data

+5% CAGR
for enrolments from India from 2015 to 2017

-5% CAGR
for enrolments from Vietnam 2015 to 2017

+4% CAGR
for enrolments from South Korea from 2015 to 2017

-16% CAGR
for enrolments from Nigeria from 2015 to 2017

Timeline of significant policy changes

2006 PM's initiative aimed at increasing the number of international students studying in the UK - with 100,000 additional students

2009 Post-study work visa introduced – with two year allowance.

2007-08
Global Financial Crisis

2010 Reduction in net migration numbers (incl international students) as a key Conservative election issue

2011 Introduction of strict immigration laws by the UK since 2011 – including student visas, work availability during study and closing of post-study work rights from 2009.

2013 Stricter conditions on universities with only 10% reject rate allowance

2015 UK introduces NHS fees for migrants staying in the UK for more than 6 months

2016 Significant UK policy changes – including removal of part time work rights, tougher visa rules through increased demonstration of financial capacity*

UK vote to leave the EU in Brexit referendum**

2018 UK expand relaxed visa rules (Tier 4) to 26 countries – but excludes India. Nigeria and Vietnam also excluded

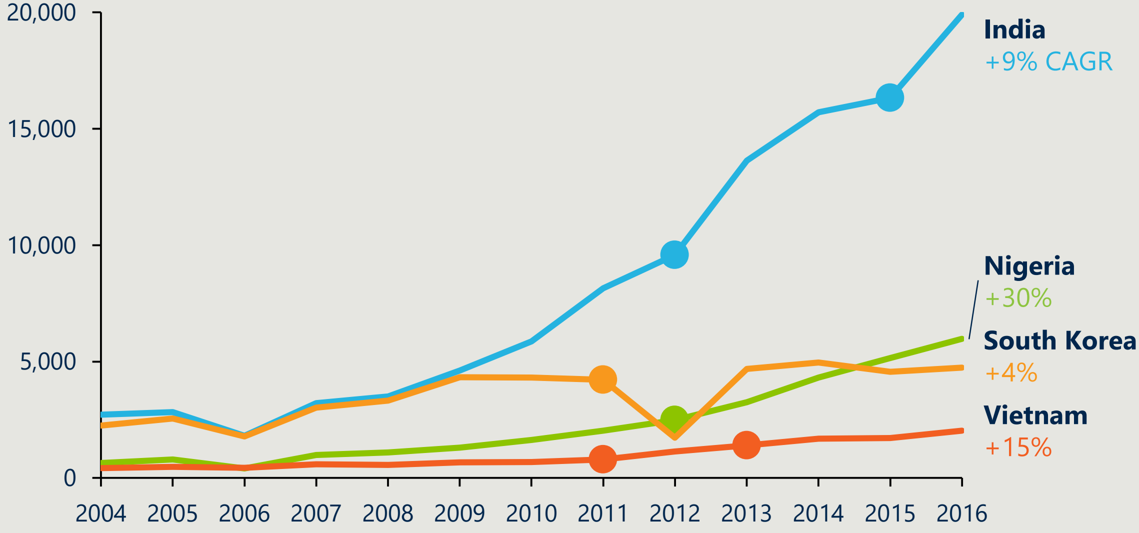
Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from HESA data. Monitor ICEF (2017) "Watch for shifts in Indian outbound this year" [http://monitor.icef.com/2017/02/watch-for-shifts-in-indian-outbound-this-year/]. Note: * This was reflected in IDP student decision drivers with a decrease in the attractiveness of visa settings. it would be expected that the impact of Brexit on student mobility would occur in FY2017-18. This data was released in January 2019, but has not been available to Nous.

Summary of key insights

- Minimal growth in total inbound student numbers to the United Kingdom since 2011, which appear impacted by changes to immigration settings in 2011.
- **India** was a large market, but significant downturn from 2011 onwards (from 38,000 students to only 16,000 students) which has only been arrested to some extent in past two years. Clear policy impact from study visa settings and post-study work rights. KEY POINT OF INFLECTION.
- **Nigeria** is a key source country for the UK, but growth has been flat since 2011 and declined from 2015 onwards. Initially flattening likely tied to visa policy changes. While 2015 onwards related to domestic recession.
- Vietnam grew through to 2016, but declined from then onwards (potential impact of 2016 policy changes, although no impact in 2011).
- **South Korea** has experienced minimal growth throughout the period with no clear impact of policy changes on enrolment numbers.
- Impact of 2018 policy change not yet assessed as UK student data not available.

Canada (as a destination)

Tertiary student mobility into the UK, by source countries of focus, 2004 to 2016



Recent HE trends based on most recent data

+38% CAGR
study permits issued for India from 2015 to 2018 (albeit flat in past year)

+58% CAGR
Study permits issued for Vietnam 2015 to 2018

+2% CAGR
study permits issued from Korea from 2015 to 2018

-2% CAGR
study permits issued for Nigeria from 2015 to 2018

Timeline of significant policy changes

2007-08
Global
Financial Crisis

2009
Canada Student Partners' Project launched in 2009 making application process easier

2014 Change in International student program so that only students enrolled at **designated institutions** can apply for a study permit, with designated institutions determined by states.

Automatic authorisation of during study work rights

2016 Path to permanent residency eased for international students with more points awarded to those that have completed post-secondary education in Canada.*

Change in practice with study permit separately issued for pathway and full-degree programs.

2018 Introduction of streamlined visa process in Canada (Student Direct Stream) for Indian, Vietnamese students (and student from two other Asian countries)

Directly tied to permanent residency

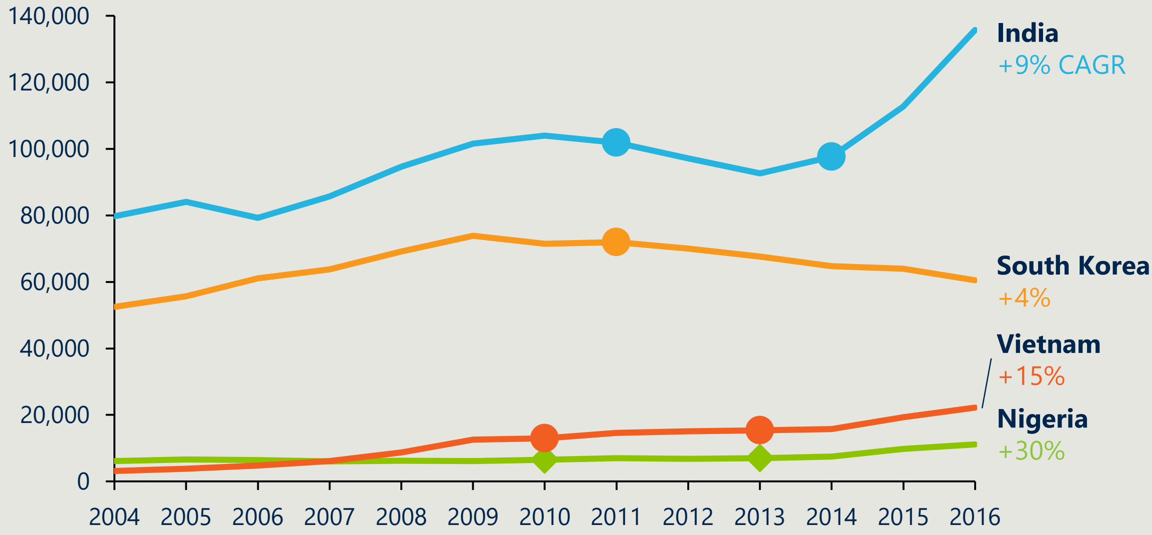
Summary of key insights

- Strong growth in student numbers to Canada from 2004 to 2016 – around 10% CAGR – much higher than the three other destination countries.
- Relatively consistent growth in **Indian** students – with numbers doubling from 2012 to 2016 – and high study permit growth in the past three years. Some evidence of increased growth following visa/work rights changes (2014 and 2016 changes). KEY POINT OF INFLECTION.
- **Nigeria** has grown very strongly up to 2016 (>30% CAGR), but has declined in the past three years, likely as a result of Nigerian recession.
- **South Korea** has experienced modest growth over the period. Some volatility in 2012, but cause is not identifiable (may be reporting error to UNESCO).
- **Vietnam** experienced strong growth up to 2016. From 2015 to 2018 study permit increased has been unparalleled (>50% CAGR). This may be due to 2016 policy changes. KEY POINT OF INFLECTION.

Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from IIRC study permit data.. Monitor ICEF (various), http://monitor.icef.com/2016/11/canada-eases-path-permanent-residency-international-students/;; http://monitor.icef.com/2018/06/canada-moves-to-speed-student-visa-processing-for-selected-asian-markets/; http://monitor.icef.com/2018/12/employability-competition-driving-indian-demand-study-abroad/ Note: this was reflected in IDP student decision drivers with an increase in the attractiveness of post-work employment opportunities.

United States (as a destination)

Tertiary student mobility into the UK, by source countries of focus, 2004 to 2016



Recent HE trends based on most recent data

+14% CAGR
for enrolments from India from 2015 to 2018

+9% CAGR
for enrolments from Vietnam 2015 to 2017

-5% CAGR
for enrolments from South Korea from 2015 to 2017

+10% CAGR
for enrolments from Nigeria from 2015 to 2017

Timeline of significant policy changes

Post-2001 Changes in immigration policies following 9/11 with tighter controls implemented

2007-08 Global Financial Crisis

2016 Extension of post-study work rights for STEM students for up to 3 years

Trump elected as US President

Change in practice requiring separate I-20 (study visa) for pathway programs, creating some barriers*

2017 Executive Order 13769 – or Trump 'Muslim travel ban' introduced

Review of H1-B 'working visa' – which may change conditions for STEM students – particularly affecting Indian students

2019 Introduction of maximum term requiring renewal (as opposed to duration of studies)

Summary of key insights

- Growth in inbound mobility to the United States has been relatively consistent – at 5% from 2004 to 2016.
- **India** outbound mobility declined in 2011, before recovering again in 2014. Since this point growth has been at over 15% CAGR. No clear impact of recent political changes and policy cause of 2011 decline not clear.
- **South Korean** enrolments have declined from 2011 onwards – in line with broader global trends.
- **Vietnam** has grown strongly over the period (around 15%), but experienced a slowing in 2010, followed by accelerated growth from 2013 onwards.
- **Nigeria** has grown over the period, and particularly quickly from 2014 onwards. Growth has slowed (albeit still at 10% CAGR) over the past three years.

Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from Open Doors enrolment data. Illieva, J. (2017) 'Do political events in host countries effect international education engagement?'; Monitor ICEF (various) http://monitor.icef.com/2018/10/us-planning-introduce-term-limits-student-visas/; http://monitor.icef.com/2017/04/us-administration-orders-h-1b-visa-reforms/ Note: this was reflected in IDP student decision drivers with a decrease in the attractiveness of visa settings.

Appendix B – Source country outbound flows, 2004 to 2018

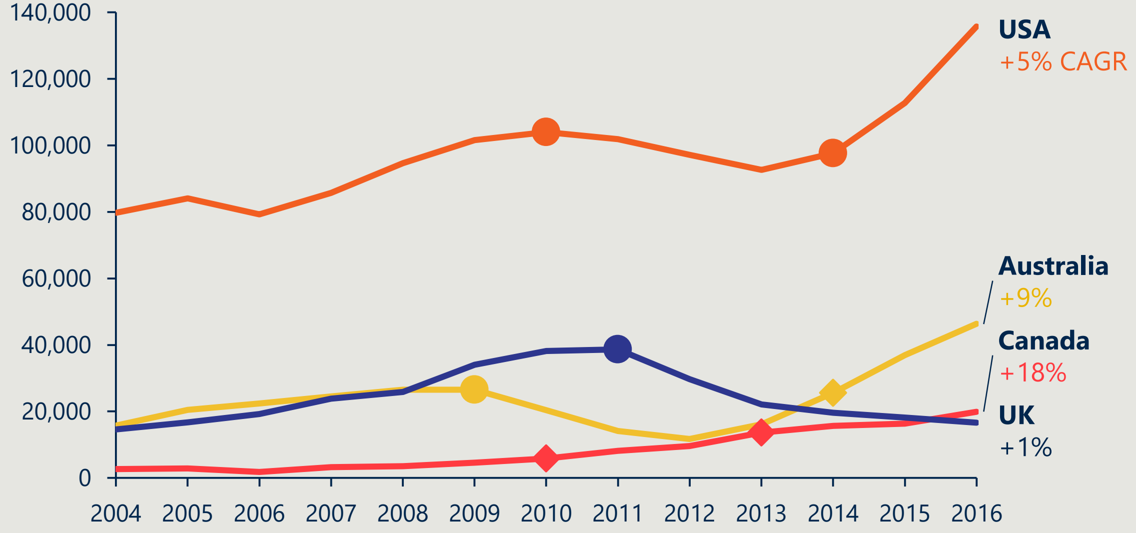
This section outlines a full summary of key policy changes and student mobility shifts from the perspective of the four source countries of focus (India, Nigeria, Vietnam and South Korea) for 2004 to the most recent enrolment data available.

India (as a source country)

Summary of key insights

- **From 2010 to 2013** there was actually a **decline in overall student mobility** from India – 3% per annum or almost 20,000 less students in 2013 compared to 2010. However, from then to 2016 growth was at 17% CAGR.
- Mobility to **Australia** has grown strongly since the downturn in 2009, where Indian student numbers were hit harder than other markets outgrowing other destinations from that point (40% CAGR since 2012).
- Mobility to the **United Kingdom** has declined most significantly from 2011 and is now a smaller destination than both Australia and Canada. Policy changes appear to be a key driver.
- The **US** as a destination has not grown as strongly as total Indian outbound numbers. There has been some recent recovery (2013 onwards) following a decline from 2011 to 2013.
- **Canada** has grown significantly but the fastest growth came in 2010 to 2013 (30% annual growth) – the period the three largest destinations experienced a decline.

Indian tertiary student mobility, by key destination country, 2004 to 2016



Recent HE trends based on most recent data

+14% CAGR
for students in the US from 2015 to 2018

+27% CAGR
for enrolments in Australia from 2015 to 2018

+38% CAGR
for Canadian study permits issued from 2015 to 2018*

+5% CAGR
for enrolments in the UK from 2015 to 2017

Timeline of significant policy changes

2005 Changes to Australian student visa settings for Indian students

2007-08 Global Financial Crisis

2009 Student violence in Melbourne

Canada Student Partners' Project launched in 2009 making application process easier

2011 Introduction of strict immigration laws by the UK since 2011 (including compulsory interviews with Indian students from 2012)

2013 UK GREAT campaign aimed at promoting UK as a great place to visit, study and do business.

2015 UK introduces NHS fees for migrants staying in the UK for more than 6 months

2016 Significant UK policy changes – including removal of part time work rights, tougher visa rules through increased demonstration of financial capacity

Introduction of SSVF in Australia

2017 India changed from SSVF L3 to L2 – a more moderate risk by Australia

2018 Introduction of streamlined visa process in Canada for Indian students

UK excludes India from relaxed visa rules (Tier 4)

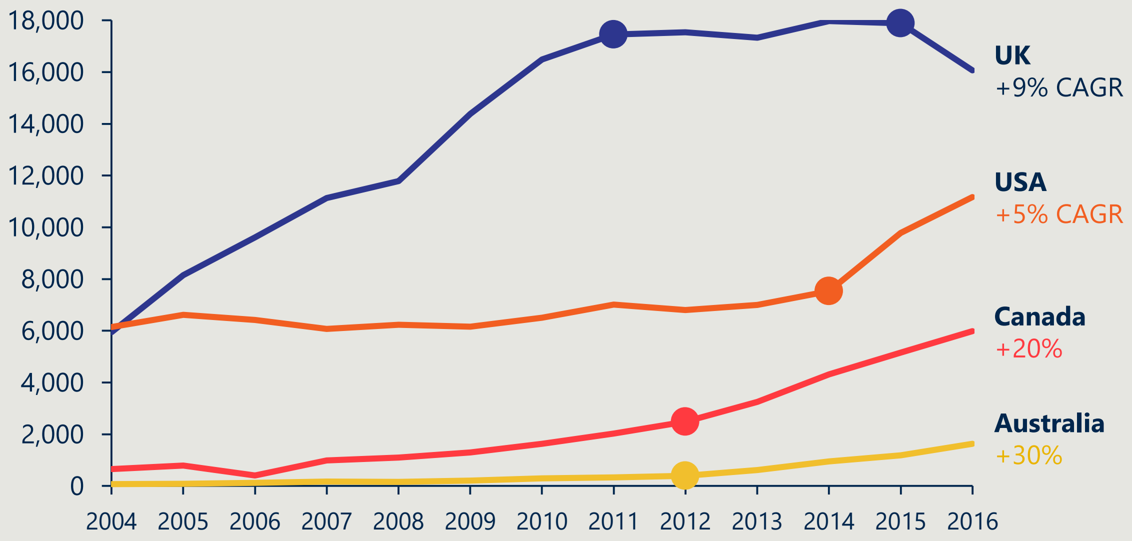
Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from various national data sets; Illieva, J. (2017) 'Do political events in host countries affect international education engagement?'; ABC News (2009) 'Anger grows over Indian student bashings'; WSJ (2015) 'New UK student visa changes for Indian: What to know"; SBS (2017) 'International student numbers set to boost after India gets higher immigration ranking': Times of India (2018) 'Canada speeds up student visa process for Indians'; 'Outrage as UK excludes India from relaxed student visa rules'. Note: CAGE refers to the compound annual growth rate of students from 2003 to 2016. *Note: there was no increase in study permits issues from 2017 to 2018.

Nigeria (as a source country)

Summary of key insights

- The **United Kingdom** is the largest destination for Nigerian students but growth has been flat since 2011. From 2015, in line with economic downturn, the number of Nigerian students have declined significantly.
- The **United States** is a less significant destination for Nigerian students, but has experienced growth since 2014, despite declines or slowing growth in the three other destinations.
- Despite strong growth in students studying in **Canada** over the period, over the past three years study permits issued have declined.
- Growth in students studying in **Australia** has been significant since 2003 from a low base, however there was no growth from 2017 to 2018 following visa risk changes.
- Both Canada and Australia experienced their largest growth in 2012 – the year following numbers to the UK declining/flattening.

Nigerian tertiary student mobility, by key destination country, 2004 to 2016



Recent HE trends based on most recent data

-16% CAGR
for enrolments in the UK from 2015 to 2017

+10 CAGR
for students in the US from 2015 to 2018

-2% CAGR
for Canadian study permits issued from 2015 to 2018

+3% CAGR
for enrolments in Australia from 2017 to 2018

Timeline of significant policy changes

2007-08 Global Financial Crisis

2011 Introduction of strict immigration laws by the UK since 2011

2015 UK introduces NHS fees for migrants staying in the UK for more than 6 months

Political pressure on Nigerian President to scrap government scholarships

2016 Significant UK policy changes – including removal of part time work rights, tougher visa rules through increased demonstration of financial capacity

Introduction of SSVF in Australia

2017 Nigeria in recession – with controls on foreign currencies leaving some Nigerian students unable to pay fees or enrol

2017 UK introduces same day visa for Nigerian students

2018 UK excludes Nigeria students from relaxed visa rules (Tier 4)

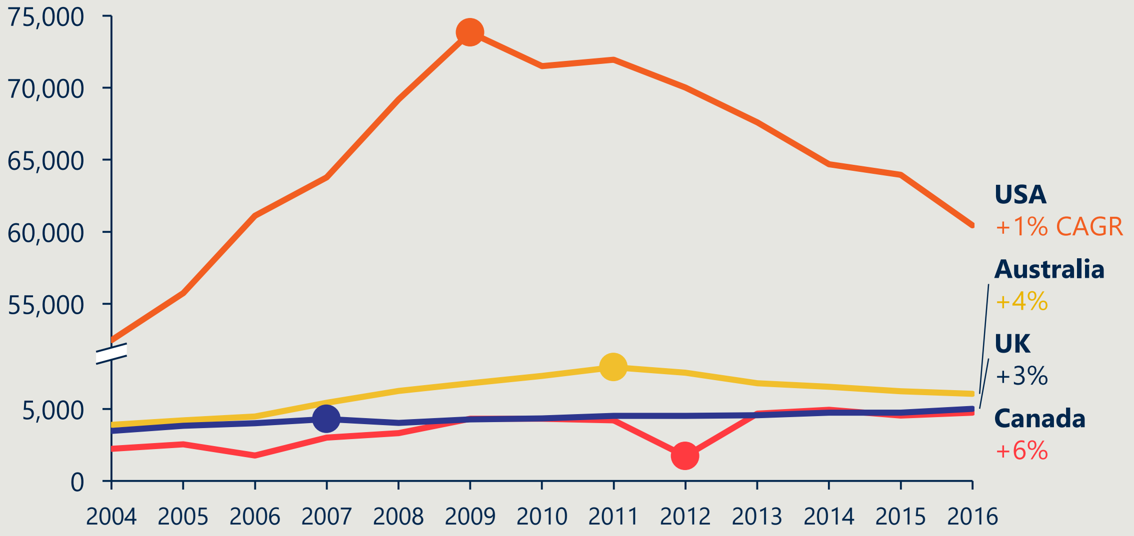
Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from various national data sets; BBC (2016) 'Nigerian economy slips into recession'; British High Commission (2017);

South Korea (as a source country)

Summary of key insights

- South Korea is a maturing market and student mobility is decreasing overall. There has been **no growth in South Korean global outbound mobility** since 2011 with 4% annual decline from 2011 to 2016.
- The **United States** is the key destination for South Korean students (over 60% of all outbound go to the US), but numbers have been declining since 2009.
- Student numbers to the second largest destination, **Australia,** follows a similar pattern (albeit at a much smaller scale) with Australian declines occurring from 2011 onwards.
- Mobility to the **United Kingdom** has been flat with slow growth, although these was noted decline in numbers in 2007.
- **Canada** has experienced the largest growth in Korean students, albeit with a anomalous reported decline in 2011 (potential reporting error).
- USA, Australia and Canada all experienced an irreversible decline from 2011.

South Korean tertiary student mobility, by key destination country, 2004 to 2016



Recent HE trends based on most recent data

-5% CAGR
for students in the US from 2015 to 2018

-4% CAGR
for enrolments in Australia from 2015 to 2018

+4% CAGR
for enrolments in the UK from 2015 to 2017

+2% CAGR
for Canadian study permits issued from 2015 to 2018

Timeline of significant policy changes

2007-08 Global Financial Crisis

2011 Introduction of strict immigration laws by the UK since 2011

2015 UK introduces NHS fees for migrants staying in the UK for more than 6 months

Australia revokes significant numbers of visas – with over 1100 South Korean students having visa revoked

2016 Significant UK policy changes – including removal of part time work rights, tougher visa rules through increased demonstration of financial capacity

Introduction of SSVF in Australia

2018 UK includes South Korean students in relaxed visa rules (Tier 4)

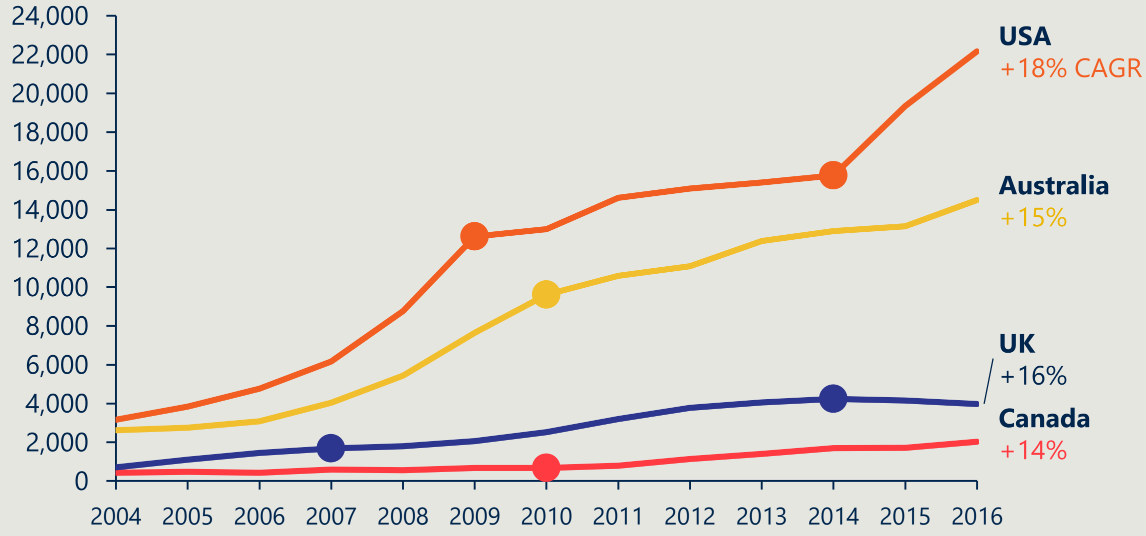
Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from various national data sets; ICEF Monitor (2014) 'Taking the long view on Korean study aboard trends'; ICEF Monitor (2015) 'Number of Korean student abroad declines for third straight year'; Study International News (2015) 'Australian immigration cancels over ten thousand international student visas.

Vietnam (as a source country)

Summary of key insights

- Overall growth in outbound student numbers from Vietnam since 2004 has been strong – over 12% CAGR increase.
- Each of the four key destination countries has grown faster than the average growth rate over the period.
- The **United States** has experienced strong growth over the period – with slowing in growth in 2009 and a strong subsequent increase in 2014. The driver for this is not clear.
- **Australia** has grown in Vietnam but experienced a slowing growth in 2010 in line with the broader Australian 2009 downturn.
- The **UK** has experienced a decline since 2014, which followed the introduction of more strict visa settings (and more generous settings in other destination countries).
- **Canada** has had the slowest growth of all destination up to 2016, but study permit data indicates very high growth from 2016 onward (almost 60%). This may be driven by changes in visa processes for Vietnamese students in both 2016 and 2018.

Vietnamese tertiary student mobility, by key destination country, 2004 to 2016



Recent HE trends based on most recent data

+9% CAGR
for students in the US from 2015 to 2018

+7% CAGR
for enrolments in Australia from 2015 to 2018

-5% CAGR
for enrolments in the UK from 2015 to 2017

+58% CAGR
for Canadian study permits issued from 2015 to 2018

Timeline of significant policy changes

2007-08
Global Financial Crisis

2011 Introduction of strict immigration laws by the UK since 2011

2015 UK introduces NHS fees for migrants staying in the UK for more than 6 months

2016 Significant UK policy changes – including removal of part time work rights, tougher visa rules through increased demonstration of financial capacity

Introduction of SSVF in Australia – Vietnam is Level 3

Canada Express Study Program – Streamlined visa for Vietnam students reducing processing times from 2 months to five months

2018 Introduction of streamlined visa process in Canada for Vietnamese students

UK excludes Vietnamese students from relaxed visa rules (Tier 4)

Vietnam changes from Australian SSVF Level 3 to Level 2.

Source: Nous global student flow integrated dataset Layer 1, based on modelled UNESCO student mobility data; Layer 3, from various national data sets; Monitor ICEF (2018) 'Canada moved to speed student visa processing for select Asian markets'.