



Region in Focus

South Asia

1 September 2021

2021 KEY RESULTS

Compared to YTD June 2019:

- 155,477 international students, a decrease of 1.7% (-2,671).
- Total enrolments grew by 2.3% to 180,366 (up 4,045).
- Commencements (new enrolments) fell by 24.6% to 46,678 (-15,232).

As at 26 July 2021, 18% of student visa holders are offshore (up from 5% in June 2020).

ENROLMENTS BY MARKETS

Nationality	2019 YTD June	2021 YTD June	Volume change on 2019	% change on 2019
India	102,712	108,493	5,781	6%
Nepal	52,156	50,555	-1,601	-3%
Sri Lanka	12,268	12,178	-90	-1%
Bangladesh	6,375	6,058	-317	-5%
Bhutan	2,687	2,954	267	10%
Maldives	123	128	5	4%
Region total	176,321	180,366	4,045	2%
<i>Total for all markets</i>	<i>708,505</i>	<i>599,535</i>	<i>-108,970</i>	<i>-15%</i>

Enrolment numbers in YTD June 2021 were 2.3% higher than YTD June 2019, with 3 of the 6 South Asian countries experiencing growth.

India experienced the largest volume growth (up 5,781) in this period. This was due to a doubling of VET enrolments.

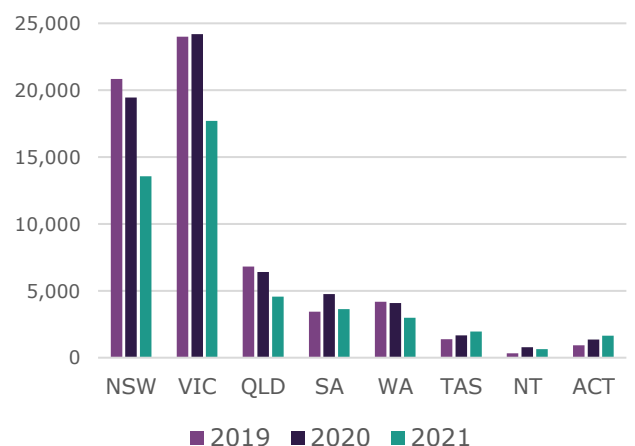
Interestingly, all six South Asian countries experienced VET enrolment growth. The 3 countries that had enrolment declines all experienced a drop in higher education enrolments that offset VET gains.

COMMENCEMENTS BY SECTOR

Sector	2019 YTD June	2021 YTD June	volume change on 2019	% change on 2019
Higher Education	32,472	13,820	-18,652	-57%
VET	23,276	30,742	7,466	32%
Schools	132	84	-48	-36%
ELICOS	5,066	1,865	-3,201	-63%
Non-award	964	167	-797	-83%
Region total	61,910	46,678	-15,232	-25%
<i>Total for all markets</i>	<i>266,804</i>	<i>169,435</i>	<i>-97,369</i>	<i>-36%</i>

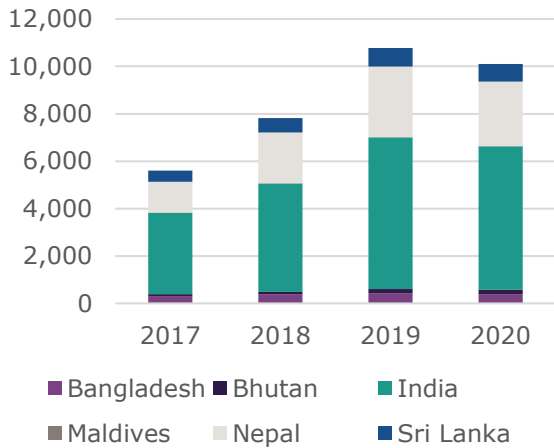
Commencements in YTD June 2021 were 24.6% lower than YTD June 2019, with only VET experiencing growth (up 32%). Nepal was the only South Asian country that experienced a decline in this sector, with commencements falling 11%.

COMMENCEMENTS BY STATES



For most states, commencements from South Asia in YTD June 2021 were much lower than 2019 and 2020. Tasmania and ACT were the only two states to experience growth in both 2020 and 2021 – though this was from a low base.

EXPORT VALUE (\$M)



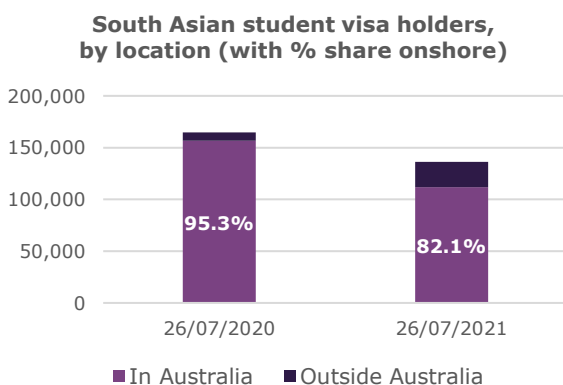
The international education export value for South Asia in 2020 was \$10.1 billion. This was a 6% drop on the peak of 2019. Total international exports fell by 21% in 2020.

Despite a decrease in international export earnings, South Asia's share increased to 32% in 2020 – a third of the sector's total export value.

Despite a 6% fall in 2020, India generated the highest export value of the South Asia markets, with a 19% share of the sector's earnings.

Bhutan and Maldives - the two smallest markets in South Asia - were the only markets in the region to experienced export growth in 2020, up 10% and 11% respectively.

ONSHORE AND OFFSHORE



In the last year, total primary student visa holders from South Asia fell by 17.3%. To be expected, the number of students offshore increased, while onshore numbers fell.

Onshore students, who made up 95.3% of student visa holders in July 2020, now account for 82.1%.

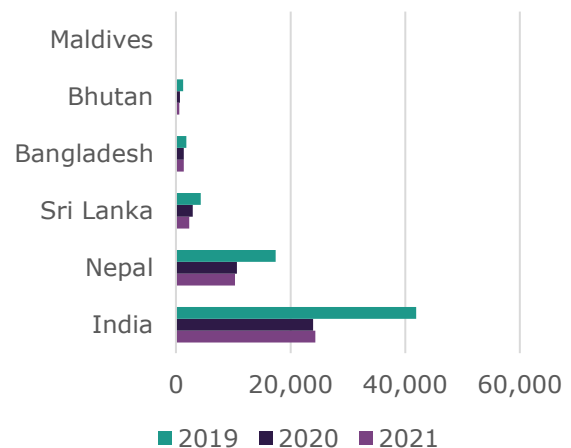
LOCATION BY MARKET

Markets	Onshore	Offshore	Total	% Offshore
Bangladesh	3,885	1,344	5,229	26%
Bhutan	2,097	308	2,405	13%
India	64,485	17,467	81,952	21%
Maldives	68	35	103	34%
Nepal	33,262	3,448	36,710	9%
Sri Lanka	8,008	1,704	9,712	18%
Region total	111,805	24,306	136,111	18%
<i>Total for all markets</i>	<i>311,895</i>	<i>160,920</i>	<i>472,815</i>	<i>34%</i>

As at 26 July 2021, Nepal has the smallest proportion of student visa holders offshore, with just 9% outside Australia. Maldives on the other hand has over a third of student visa holders offshore.

STUDENT VISA TRENDS

Primary student visas lodged, by market (YTD June)



In YTD June 2019, the South Asian markets lodged 66,768 student visas, a 32% increase on the previous year. Fast forward two year and this number has dropped to 38,917 (a 42% decline).

All six markets saw a fall in visas lodged in YTD June 2021 compared to the same period in 2019. India, the largest market, accounted for over 60% of the decline, with visas lodged decreasing by 17,612.

However, the drop in visas lodged appears to have stabilised. Compared to the same time last year, YTD June 2021 visas lodged by South Asian countries have declined by only 1.7%.