

SOURCE MARKET WEBINAR

# Recruiting Students from India

TUESDAY, 21 JANUARY 2025

09:00 AM ET | 02:00 PM GMT

**BONARD**  
EDUCATION



**Madhav Gupta**  
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**Kristina Benedikova**  
BONARD  
PRESENTATION



**Ivana Bartosik**  
BONARD  
CHAIR

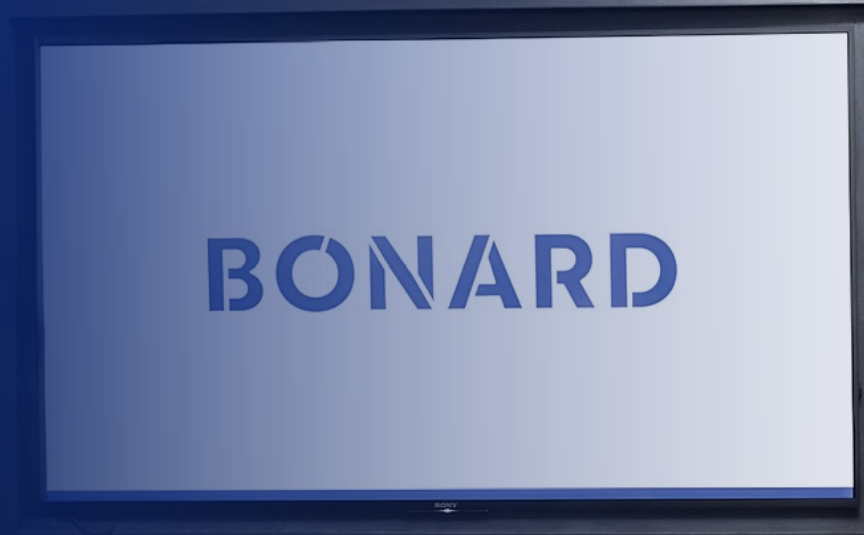


## About BONARD

### Empowering progress

Established in 2007, BONARD Education is an independent market research and strategic development firm specialising in international education.

We accompany education providers, associations, governments, and investors on their journey to make international education a transparent, thriving, and transformative industry.



### Our team



4  
Offices



91  
Specialists



623  
Projects conducted

### Industry memberships and affiliations



### Clients and partners

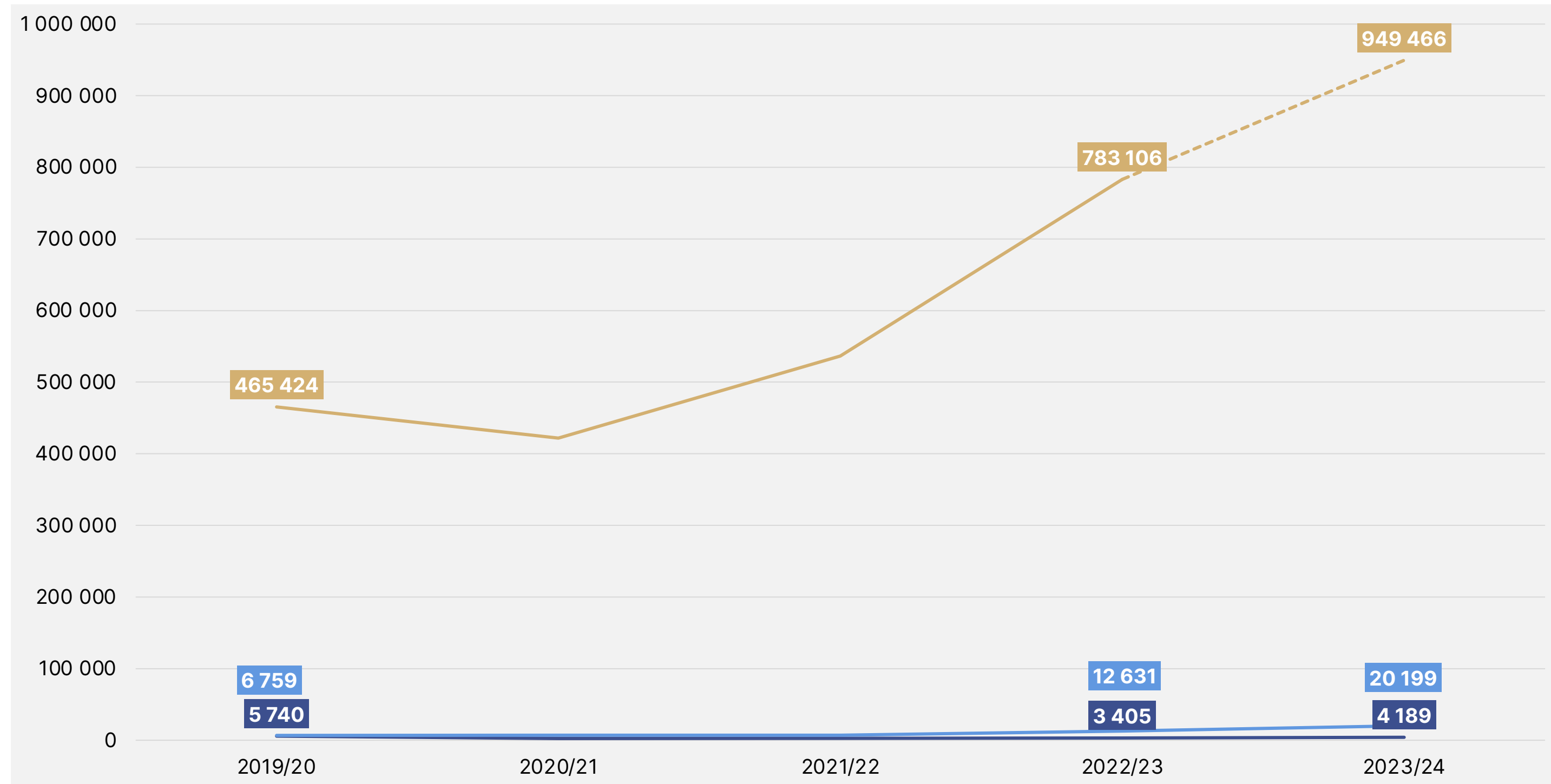


# Session outline

-  **Market presentation: Demand for study abroad**
-  **Panel discussion: Emerging trends**
-  **Q&A**

# India: Number of international students in selected destinations

HIGHER EDUCATION   ENGLISH LANGUAGE TEACHING   K-12

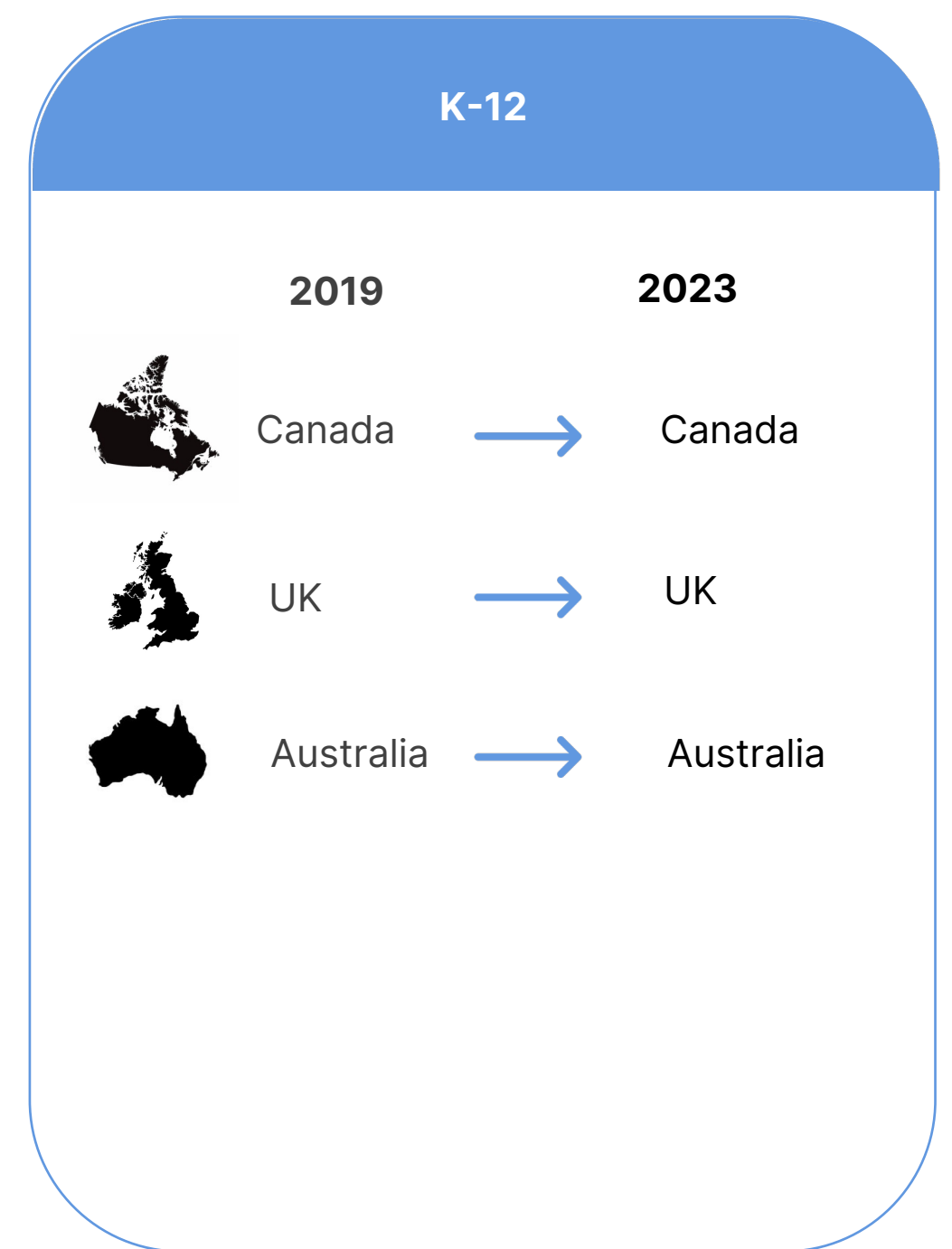
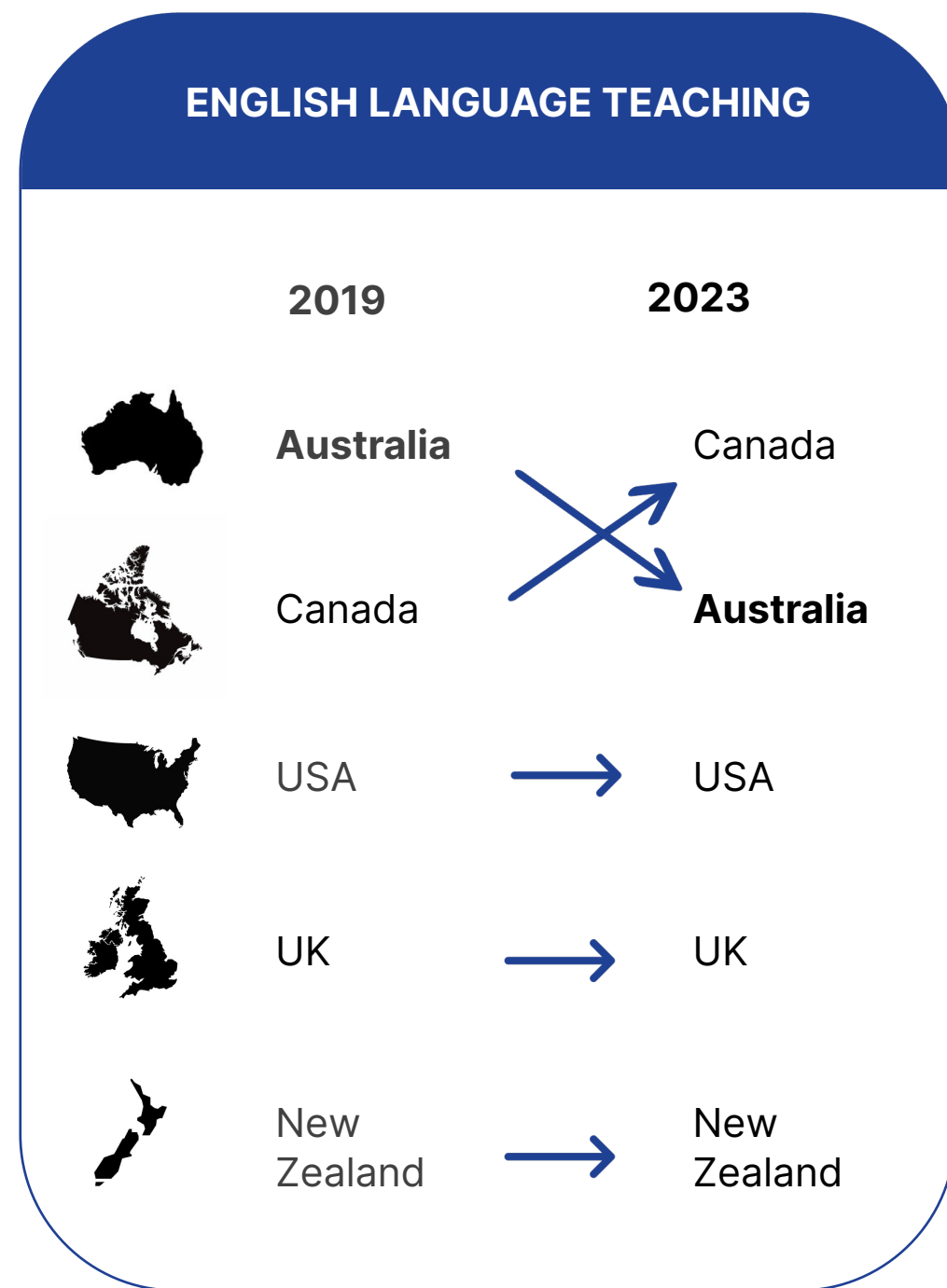
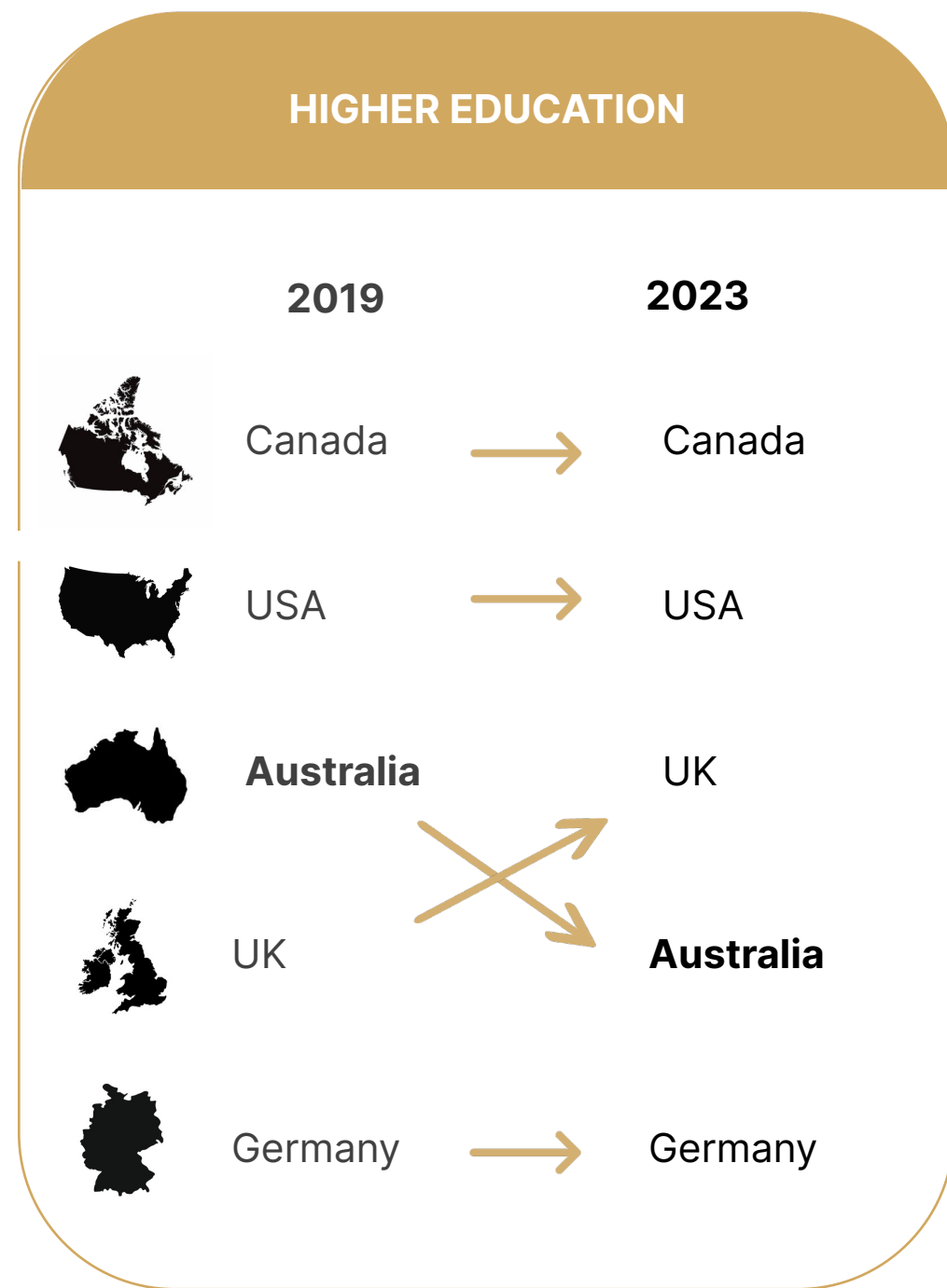


- Destinations included:**
- Australia
  - Canada
  - Germany
  - UK
  - USA

**Note:** Figures represent an indicative comparison due to limitations of available sources.

**Source:** IIE, 2024; HESA, 2024; ISC, 2024; English UK, 2024; IRCC, 2024; Languages Canada, 2024; Australian Government, Department of Education, 2024; English Australia, 2024; Wissenschaft Weltoffen, 2024.

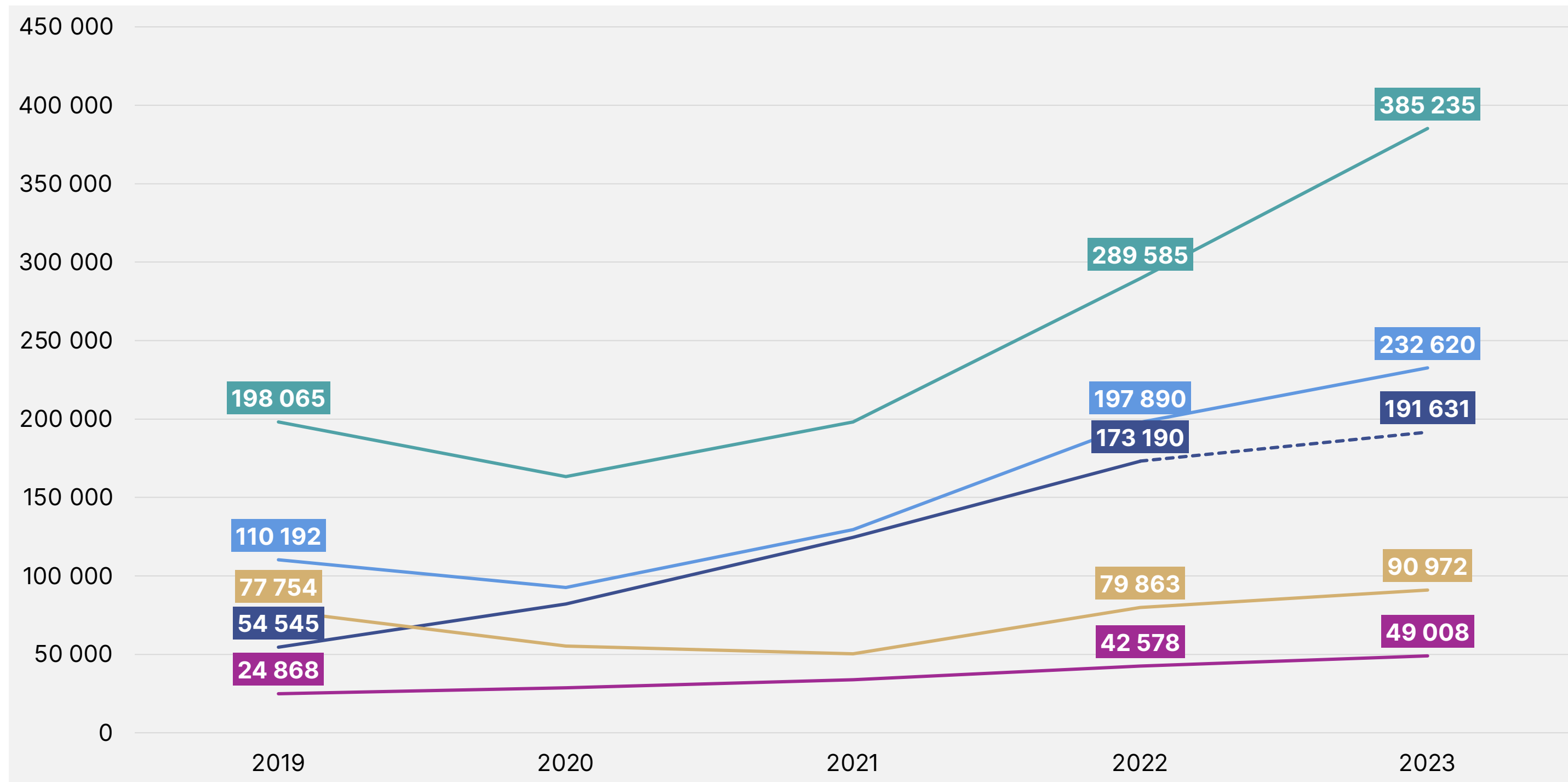
# India: Destination popularity by sector




**Note:** Figures represent an indicative comparison due to limitations of available sources.


**Source:** IIE, 2024; HESA, 2024; ISC, 2024; English UK, 2024; IRCC, 2024; Languages Canada, 2024; Australian Government, Department of Education, 2024; English Australia, 2024; English New Zealand, 2024; Wissenschaft Weltoffen, 2024.

# Higher Education: Student numbers by destination





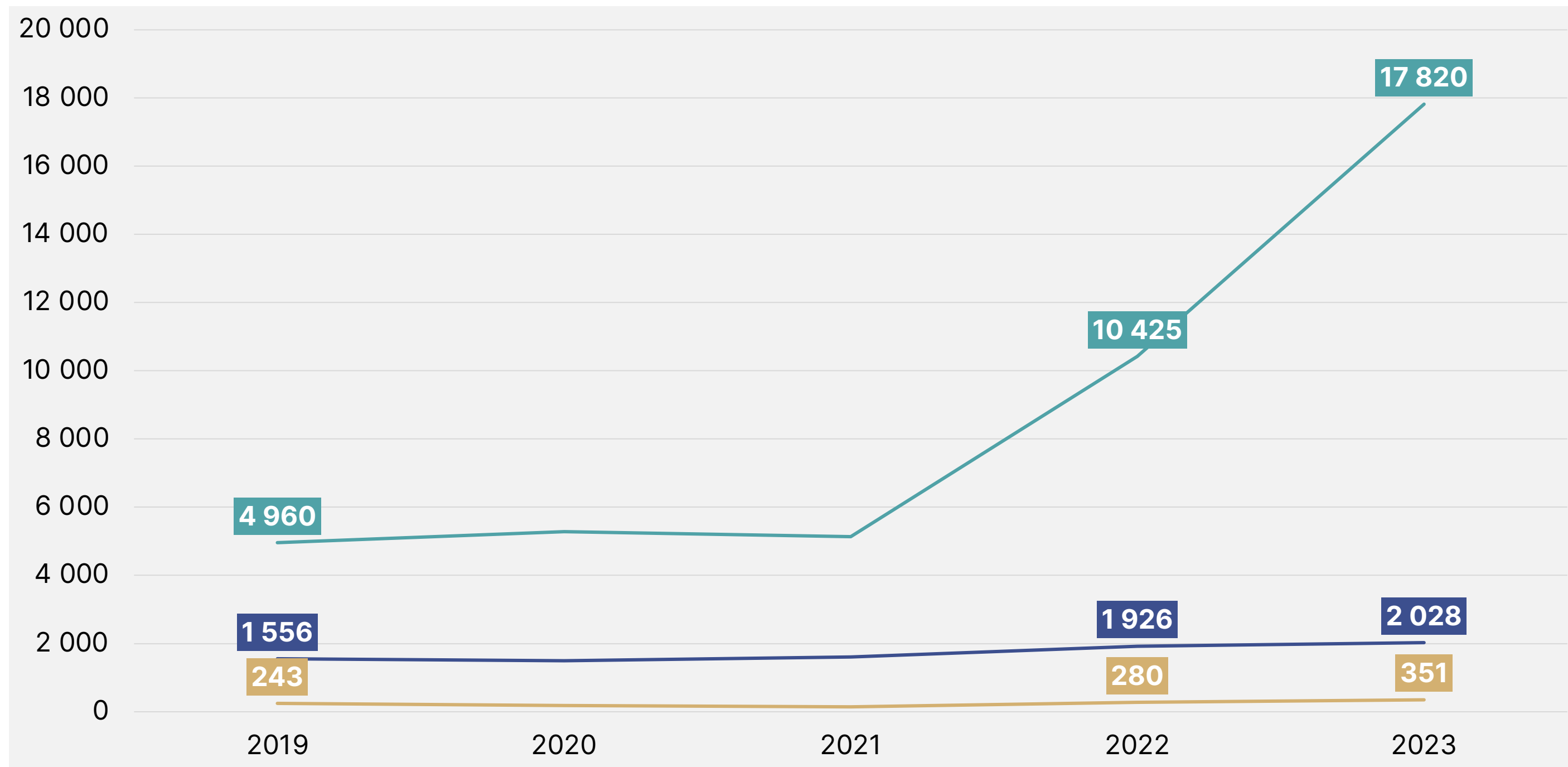
UK REACHED  
**351%**  
of 2019 volume  
(post-secondary  
students) in 2023



USA REACHED  
**211%**  
of 2019 volume  
in 2023

Source: IIE, 2024; HESA, 2024; IRCC, 2024; Australian Government, Department of Education, 2024; Wissenschaft Weltoffen, 2024.

# K-12: Student numbers by destination



The most popular provinces in Canada:

- Ontario
- British Columbia
- Alberta

Source: IRCC, 2024; Australian Government, Department of Education, 2024; ISC, 2024.



More granular data and country-specific insights can be accessed via the BONARD Education Platform. Available 24/7.

- Home
- Student Enrolment Data
- Student Visa Data
- Country Insights
- Agent Database

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- Market News
- Presentations

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- About the Platform
- Terms of Use
- Additional Services

**TRANSFORMING  
THE WAY  
INSTITUTIONS  
WORK WITH DATA**

## INTERNATIONAL EDUCATION PLATFORM

Welcome!

**The Ultimate Solution**  
for Driving Your International Student Recruitment Strategy

Explore → Identify → Access → Connect

the latest enrollment and visa grant data

suitable countries for international student recruitment

granular data on 200+ source countries

with suitable, pre-screened quality partners

**B**

### Upcoming Events

**Source Market Webinar: Türkiye**  
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### Total Visa Granted

Q3 2024 vs Q3 2023

AUSTRALIA	50,041	↓ 19%
CANADA	78,902	↓ 74%
NEW ZEALAND	18,744	↑ 3%
UK	263,913	↓ 13%
USA	131,165	↓ 21%

### Fastest-growing Countries

Q3 2024 vs Q3 2023

AUSTRALIA	1	China ↑ 4,195	2	Sri Lanka ↑ 472	3	Bangladesh ↑ 338
	CANADA	UAE ↑ 390	Saudi Arabia ↑ 190	Qatar ↑ 75		
		NEW ZEALAND	Sri Lanka ↑ 522	China ↑ 435	Nepal ↑ 372	
UK	Nepal ↑ 1,567	USA ↑ 661	Türkiye ↑ 529			
USA	Vietnam ↑ 2,126	Nepal ↑ 1,181	Pakistan ↑ 520			



Schedule a demo here

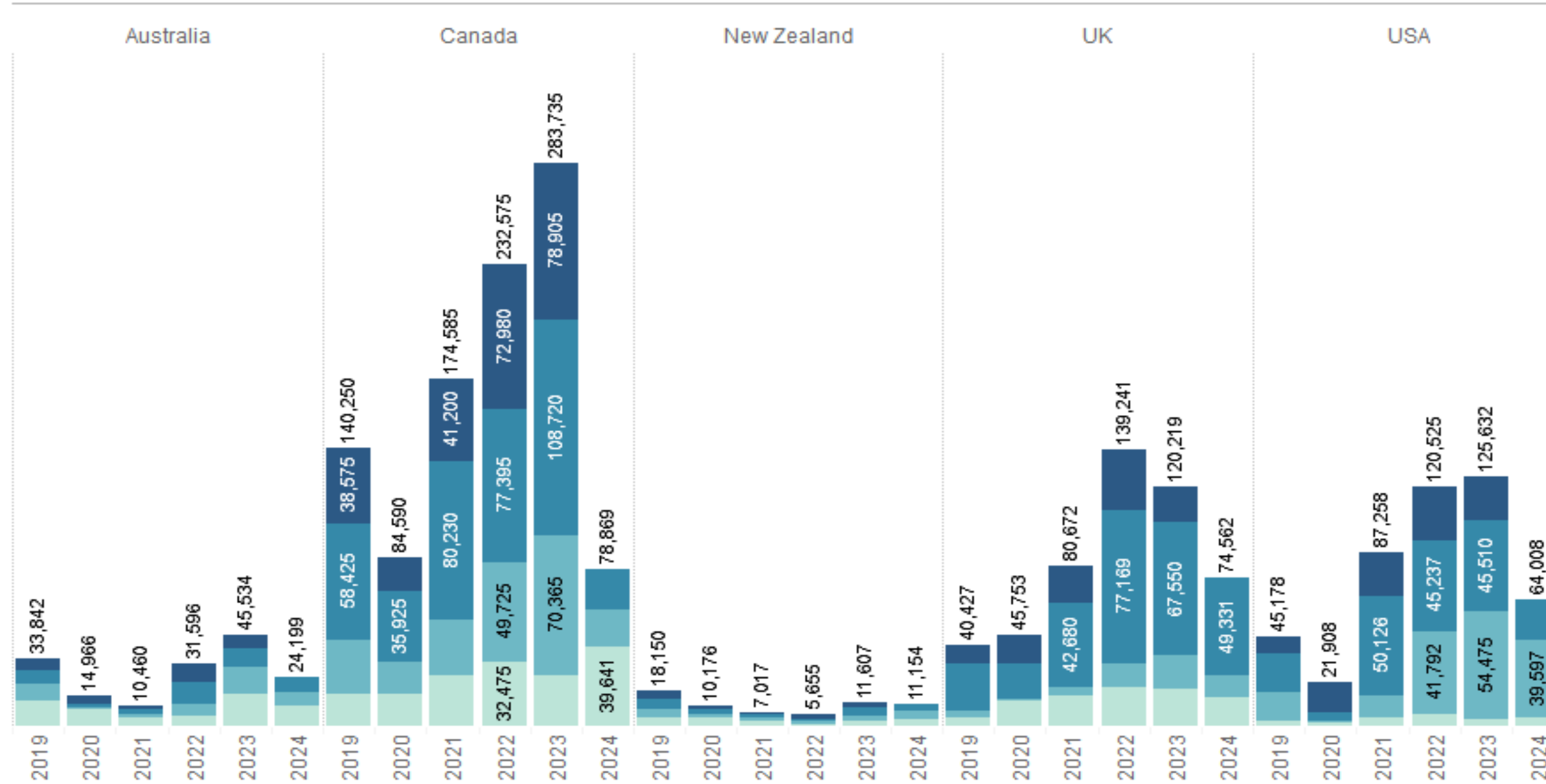


# Market Outlook: Student visa grants by destination

## Number of student visas granted

Source Country

Q1 Q2 Q3 Q4



**Australia:** The most popular sector for Indian students is HE, followed by VET programs. In Q3, HE visa numbers decreased by 14%, while VET visa grants more than doubled in Q3.

**Canada:** while there was an increase in Q1, the visa grants drastically dropped in Q2 and Q3.

**New Zealand:** 2024 is likely to overcome 2023 visa grant levels.

**UK:** Q3 visa grants down by 41% in HE compared to 2023.

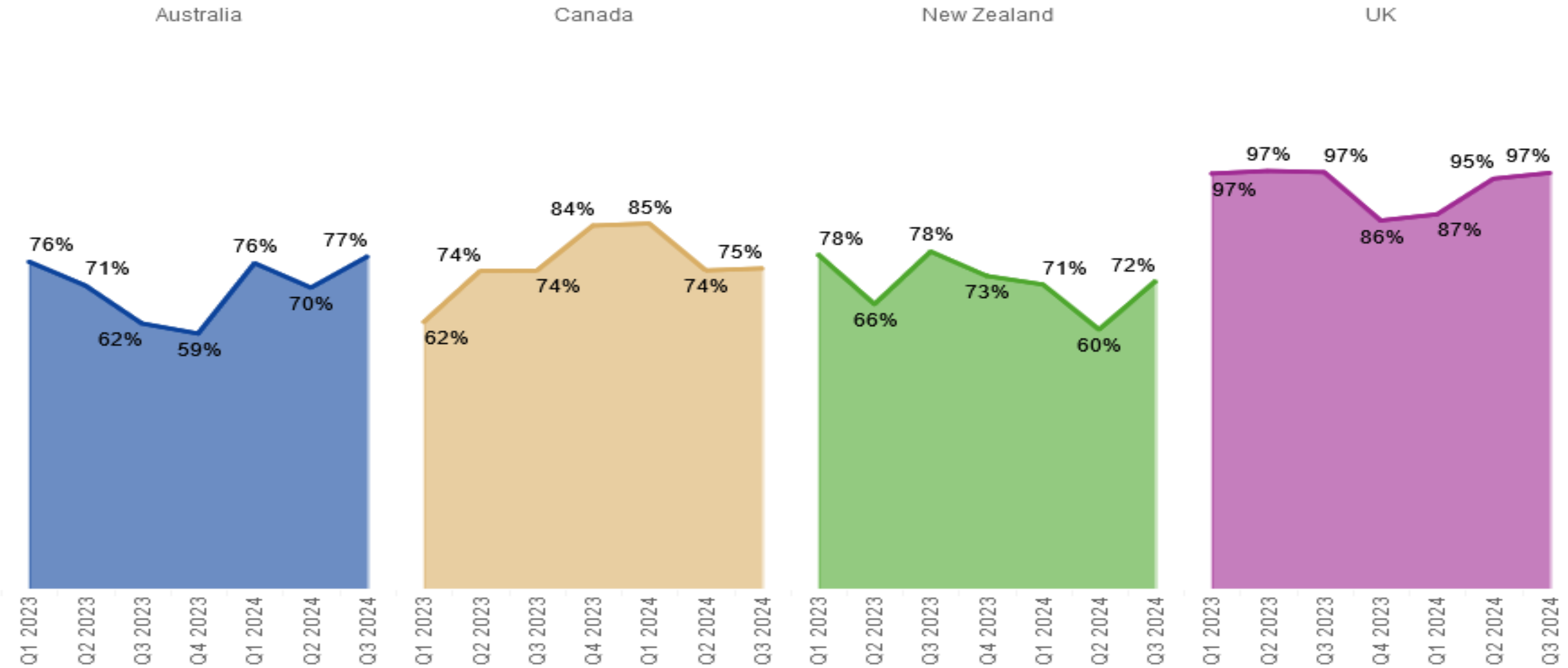
**USA:** issues with granting visas were reported, hence Indian students witnessed a drop in visa issuance in 2024.

Source: Department of Home Affairs, 2024; IRCC 2024; Immigration New Zealand, 2024; UK Home Office, 2024; U.S. State Department, 2024

# Market Outlook: Student visa grant rate benchmark

## Student visa grant rate

Source Country



Source: Department of Home Affairs, 2024; IRCC 2024; Immigration New Zealand, 2024; UK Home Office, 2024.

# Emerging trends



**Undergraduate study and VET**



**Specialized courses like AI and Data Analytics**



**High interest in STEM, Health and Nursing**



**Shift to non-traditional study destinations**



# Panel discussion



**Ivana Bartosik**  
BONARD  
CHAIR



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