

FSW® FLOW AUSTRALIA ANALYTICS



Higher Education Sector Takeaway

Generated April 05, 2026

A sector-specific recruitment report for universities and degree-led channels, focused on market quality, origin selection, and trend timing.

Use the QR code to open the live sector-filtered view online.

Live view

[Open filtered report online](#)

183,451	157,567	25,884	85.89%
Lodged	Granted	Not Granted	Grant Rate

Executive Highlights

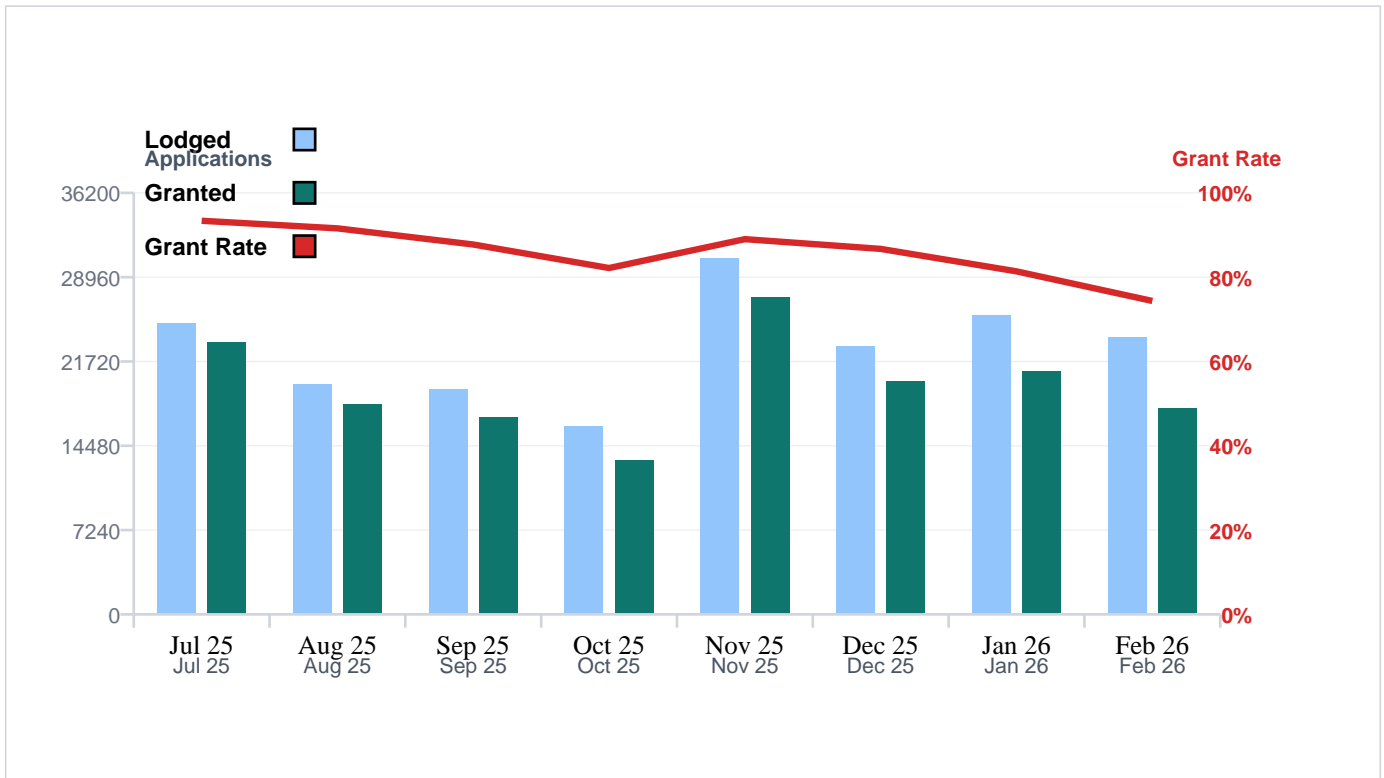
Best target market China at 96.29%	Caution market Lebanon at 58.67%	Top provider state NSW with 65,457 apps	Best month Jul 2025 at 93.38%
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Recruitment Readout

- Higher Education visa grant rate is running at **85.89%**, which is **+6.39 percentage points** versus the Australia all-sector average of **79.50%**.
- Priority recruitment markets are **China, Bhutan, Vietnam**, where usable volume is already present and grant rates are holding at or above the sector benchmark.
- Use tighter screening in **India, Nepal, Bangladesh**; these markets still matter by volume, but current grant rates sit below the working benchmark for this sector.
- Operationally, this sector is concentrated in **Outside Australia**, is led by the **20 to 24 years** age band, and lands most heavily in **NSW** providers.
- The best month so far was **Jul 2025** at **93.38%**, which helps frame campaign timing and intake planning.

Monthly Lodged, Granted & Grant Rate

The sector trend should be read first: volume matters, but quality and timing decide where recruitment pressure should go.



Recent Trend Snapshot

Month	Applications	Grants	Grant Rate
Sep 2025	19,305	16,941	87.75%
Oct 2025	16,142	13,264	82.17%
Nov 2025	30,604	27,243	89.02%
Dec 2025	23,062	19,998	86.71%
Jan 2026	25,687	20,903	81.38%
Feb 2026	23,842	17,730	74.36%

Target And Caution Market Readout

A short list of countries worth acting on now, with the reason each one belongs on the plan.

Country	Segment	Grant Rate	Why
China	Best target market	96.29%	45,918 applications and 44,216 grants, comfortably above the sector benchmark.

Country	Segment	Grant Rate	Why
Lebanon	Caution market	58.67%	Material volume remains, but the 58.67% outcome is below the sector benchmark and needs tighter screening.
Bhutan	Recruit now	87.66%	3.94% share with grant rates at or above the sector benchmark, making this a scalable recruitment lane.
Vietnam	Recruit now	90.11%	3.24% share with grant rates at or above the sector benchmark, making this a scalable recruitment lane.
India	Be selective	73.74%	Volume is present, but outcomes lag the benchmark by 12.15 percentage points.
Nepal	Be selective	77.12%	Volume is present, but outcomes lag the benchmark by 8.77 percentage points.
Bangladesh	Be selective	80.23%	Volume is present, but outcomes lag the benchmark by 5.66 percentage points.

Where To Recruit Now

Markets with meaningful volume and grant rates at or above the current sector benchmark.

Country	Applications	Share	Grant Rate
China	45,918	25.03%	96.29%
Bhutan	7,236	3.94%	87.66%
Vietnam	5,943	3.24%	90.11%

High-Volume Caution

Large source markets below the sector benchmark. Recruit here selectively and tighten conversion rules.

Country	Applications	Share	Grant Rate
India	35,957	19.60%	73.74%
Nepal	25,611	13.96%	77.12%
Bangladesh	13,173	7.18%	80.23%

Emerging Markets To Test

Smaller markets already clearing the benchmark and worth pilot effort before scaling.

Country	Applications	Share	Grant Rate
Russia	173	0.09%	90.75%
Laos	133	0.07%	87.97%
Ghana	121	0.07%	86.78%
Macau	120	0.07%	97.50%
Uganda	119	0.06%	94.96%

Top Source Markets

Full ranked view of the main source countries inside this sector.

Country	Applications	Grants	Grant Rate	Share
China	45,918	44,216	96.29%	25.03%
India	35,957	26,515	73.74%	19.60%
Nepal	25,611	19,751	77.12%	13.96%
Bangladesh	13,173	10,569	80.23%	7.18%
Bhutan	7,236	6,343	87.66%	3.94%

Country	Applications	Grants	Grant Rate	Share
Vietnam	5,943	5,355	90.11%	3.24%
Sri Lanka	5,122	4,333	84.60%	2.79%
Pakistan	4,800	3,337	69.52%	2.62%
Indonesia	4,196	4,086	97.38%	2.29%
Philippines	3,308	2,900	87.67%	1.80%
Kenya	3,276	2,871	87.64%	1.79%
Malaysia	2,612	2,547	97.51%	1.42%

Provider State Fit

Australian provider states carrying the most in-sector volume and their associated outcomes.

State	Applications	Grants	Grant Rate
NSW	65,457	55,503	84.79%
VIC	47,714	41,881	87.78%
QLD	21,475	18,784	87.47%
WA	19,739	16,391	83.04%
SA	16,541	14,168	85.65%
Not Available	5,093	4,343	85.27%
ACT	3,260	3,058	93.80%
TAS	2,241	1,778	79.34%
NT	1,931	1,661	86.02%

Age Profile

Primary age bands active in this sector, which helps shape audience selection and messaging.

Age Group	Applications	Grants	Grant Rate
20 to 24 years	73,788	65,298	88.49%
15 to 19 years	42,513	35,165	82.72%
25 to 29 years	41,212	35,250	85.53%
30 to 34 years	14,474	12,182	84.16%
35 to 39 years	4,664	3,915	83.94%
0 to 4 years	2,353	1,937	82.32%
40 to 44 years	1,702	1,444	84.84%
5 to 9 years	1,316	1,154	87.69%
10 to 14 years	734	638	86.92%
45 to 49 years	499	424	84.97%

Applicant Location

In-country versus offshore concentration for this sector.

Location	Applications	Grants	Grant Rate
Outside Australia	126,351	106,468	84.26%

Location	Applications	Grants	Grant Rate
In Australia	57,100	51,099	89.49%

Applicant Type

Primary versus secondary applicant mix in the current sector load.

Applicant Type	Applications	Grants	Grant Rate
Primary	159,667	137,864	86.34%
Secondary	23,784	19,703	82.84%

Methodology & Usage

<p>About this report This report uses public data from data.gov.au. FSW® makes no guarantees regarding accuracy and disclaims any liability from its use.</p>	<p>Recommended usage</p> <ol style="list-style-type: none"> 1. Use this report to align recruitment focus. 2. Open the filtered country report for interactive ranking. 3. Use the Visa Map when you need presentation-ready market context.
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