

# FSW® FLOW AUSTRALIA ANALYTICS



## Higher Education Sector Takeaway

Generated April 10, 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](#)

<b>183,451</b>	<b>157,567</b>	<b>25,884</b>	<b>85.89%</b>
Lodged	Granted	Not Granted	Grant Rate

### Executive Highlights

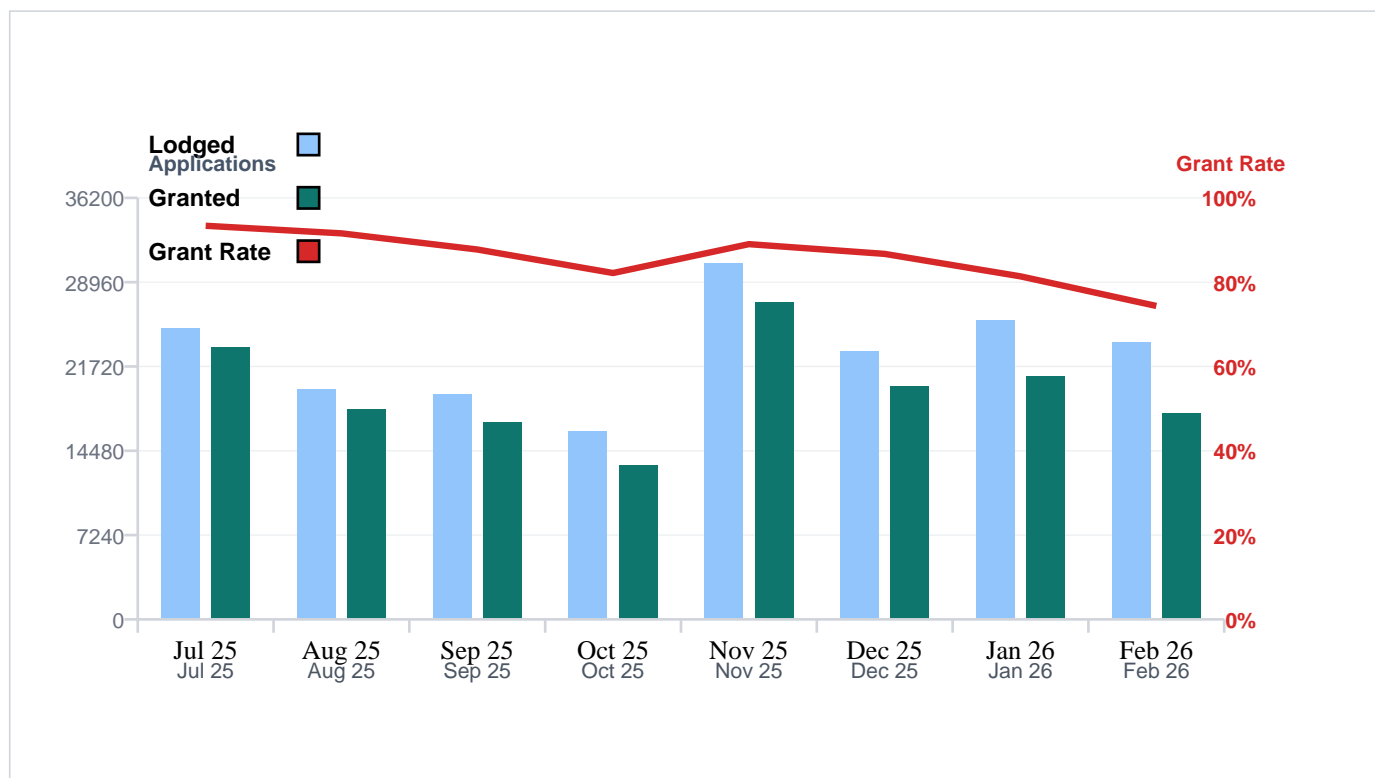
<b>Best target market</b> China at 96.29%	<b>Caution market</b> Lebanon at 58.67%	<b>Top provider state</b> NSW with 65,457 apps	<b>Best month</b> Jul 2025 at 93.38%
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### Recruitment Readout

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