



The Great Destination Shuffle:

Turning Data into Direction

Languages Canada 19th Annual Conference



LAND ACKNOWLEDGEMENT

We appreciate and acknowledge that we are gathered on the ancestral and traditional territory of the Blackfoot Nations of the Siksika, Piikani and Kainai First Nations; the Îethka Nakoda Wîcastabi First Nations, comprised of the Chiniki, Bearspaw, and Goodstoney First Nations; and the Tsuut'ina First Nation. The City of Calgary is also homeland to the historic Northwest Métis and to the Otipemisiwak Métis Government, Métis Nation Battle River Territory (Nose Hill Métis District 5 and Elbow Métis District 6).

We acknowledge and give gratitude to the many First Nations, Métis, and Inuit who have lived in and cared for these lands for generations and call Calgary home. We would also like to acknowledge that you are joining us today from many places, near and far, and acknowledge the traditional owners and caretakers of those lands.



Today's Speakers



Matt Stiegemeyer, Ed.D.
Senior Director,
Client Relations and Partnerships



Ankita Goyal, RCIC-IRB
Founder and Managing Director



Itai Shenker
Senior Vice President,
Operations

Today's Discussion Roadmap

01

Global mobility signals

02

Canada's policy interpretation and implications

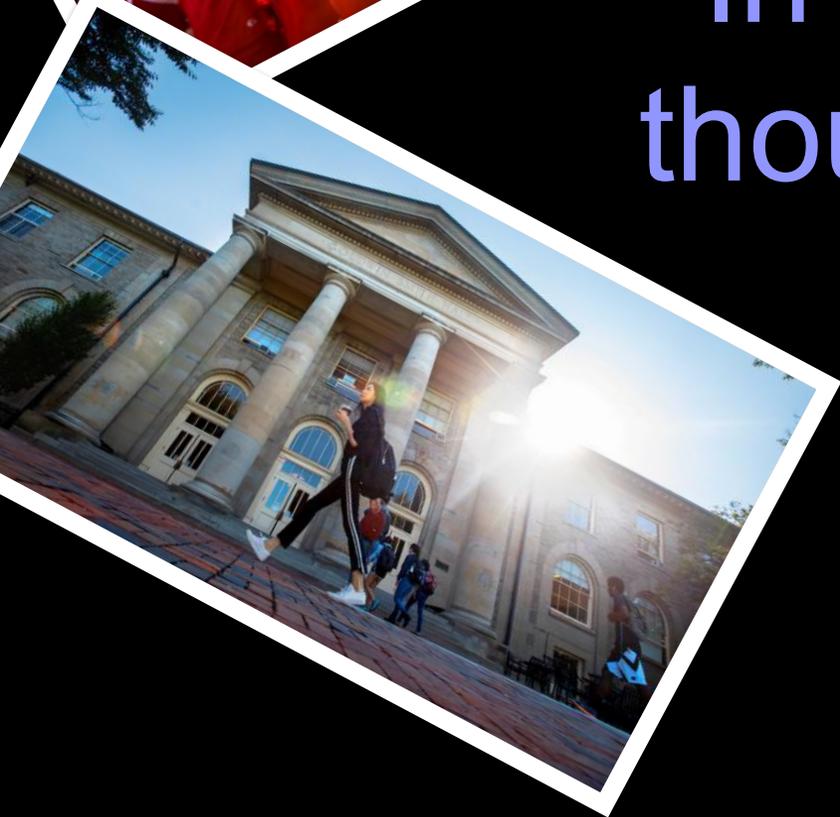
03

Institutional response and innovation



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But first,
In case you haven't
thought about TOEFL
lately...



Designed to better support today's students, advisors, and institutions

Test Structure

Reading, Listening,
Speaking, Writing

Approx 2 hours

Adaptive for Reading
and Listening

Registration

5 minutes to create an
account, choose test
center or Home
Edition, select date
and time, checkout

Prep Resources

Personalized practice
and diagnostics

Expanded prep
resources for
test-takers and
educators

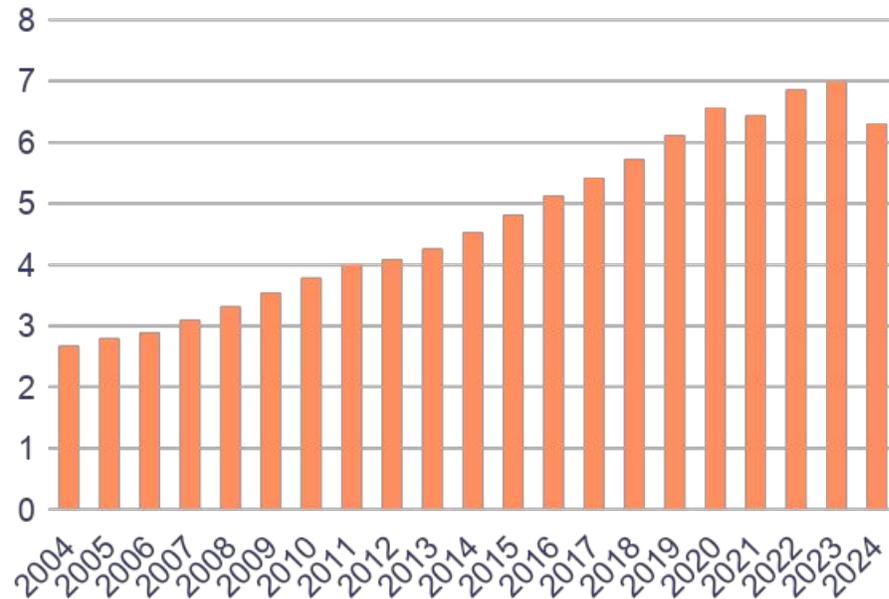
Coming soon...TOEFL for Economic Immigration



International student
demand isn't disappearing

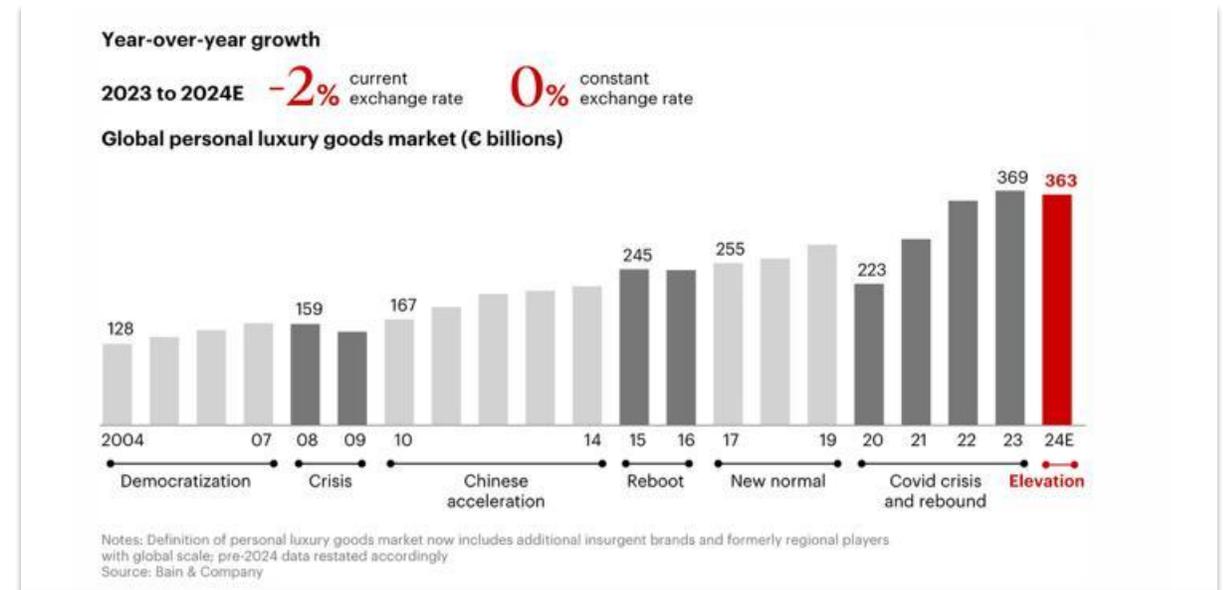
Global student flows: Following same trajectory as luxury goods

Total Int'l Students (Global; Millions)



Total int'l students = **160% growth** from '04 to '23

Personal Luxury Goods Sales (Global; Billions)



Luxury goods = **188% growth** from '04 to '23

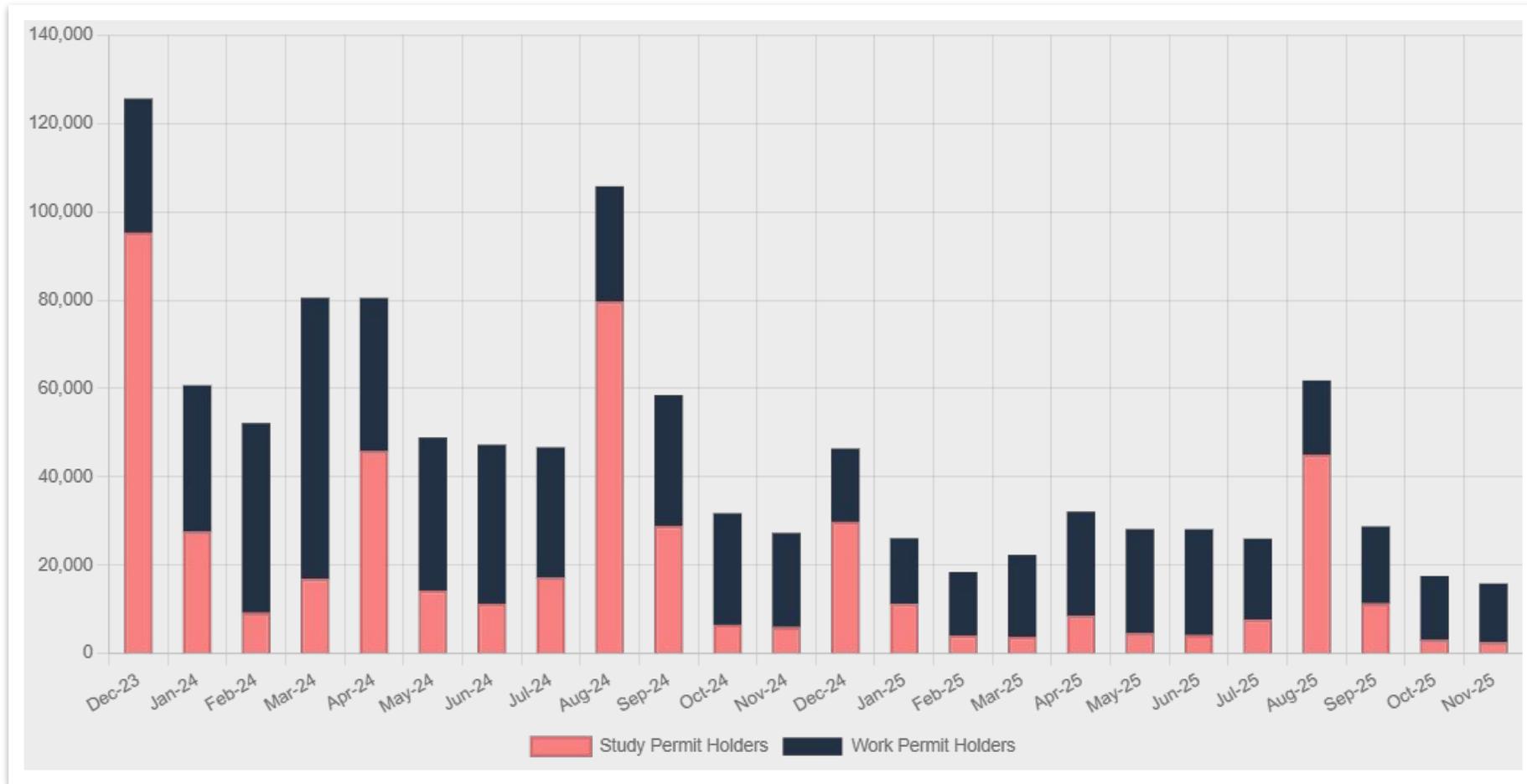
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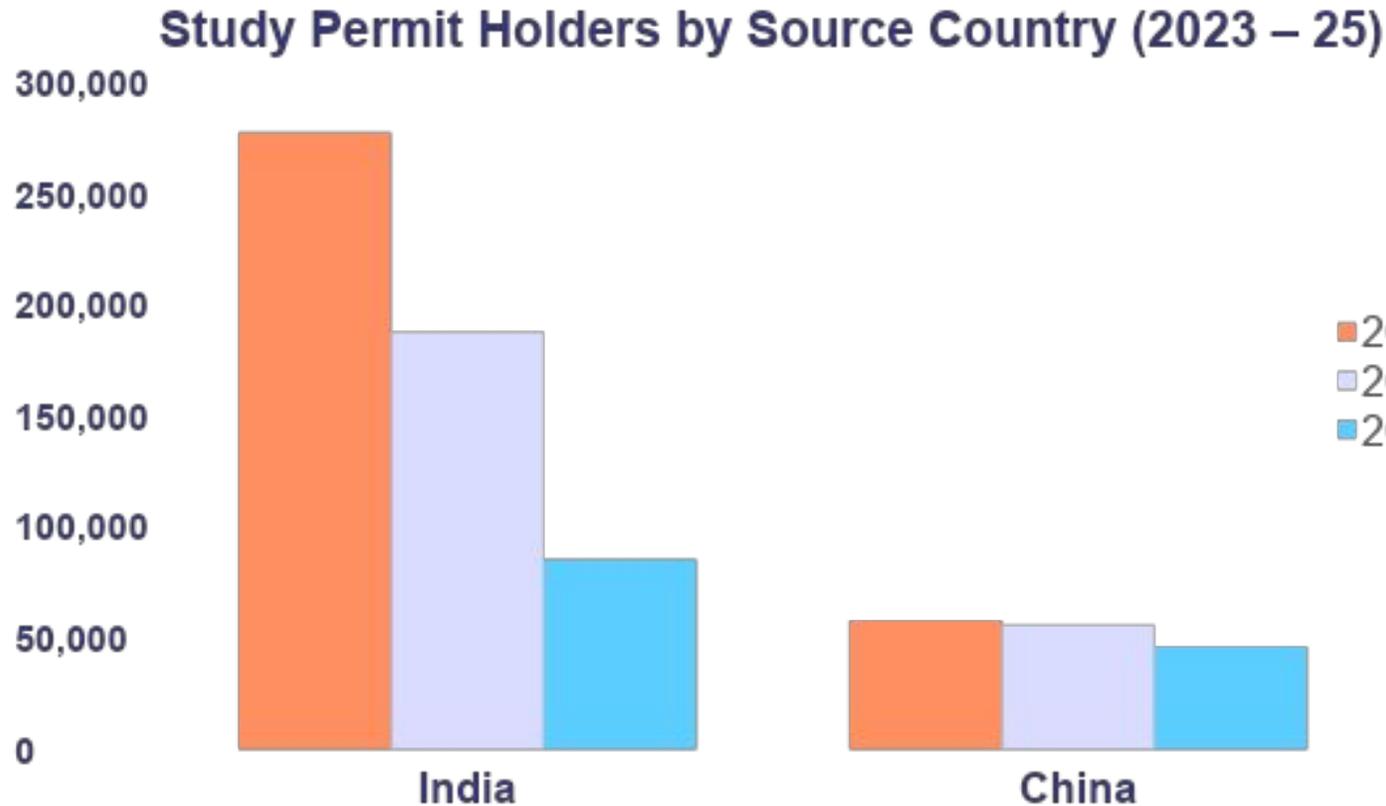
The “Big Four”

Addressing the policy carousel in
Australia, Canada, UK, and U.S.

In Canada, the government is actively *promoting* a decline in inbound migration, including overseas students



In 2023, Canada hosted nearly 280,000 students from India; in 2025, that number fell below 100,000



Note: 2025 data excludes the month of December.

Australia, which hosts 833k+ int'l students, saw its number of new students fall by 15% in 2025, but aims for growth in '26

- As of October 2025, Australia hosted 833,041 international students, an **0.3% drop** versus 2024.
- The number of **new** students in Australia in 2025 (190,799), though, **fell 15%** versus the prior year.
- 57% of int'l students arrived from these countries: China (23%), India (17%), Nepal (8%), Vietnam (4%) and the Philippines (4%).
- **Australia also raised its cap on new int'l students for 2026 to 295k, up from 270k in '25.**
Two-thirds of these visas are allotted to public universities.

Over past 5 years, the UK has seen 78% growth in students from India, while inbound volumes from China remain flat

UK Study Visas by Country (20-21)



UK Study Visas by Country (24-25)



Of note: **Chinese students account for 43% (105,000)** of overseas enrollments at Russell Group universities.

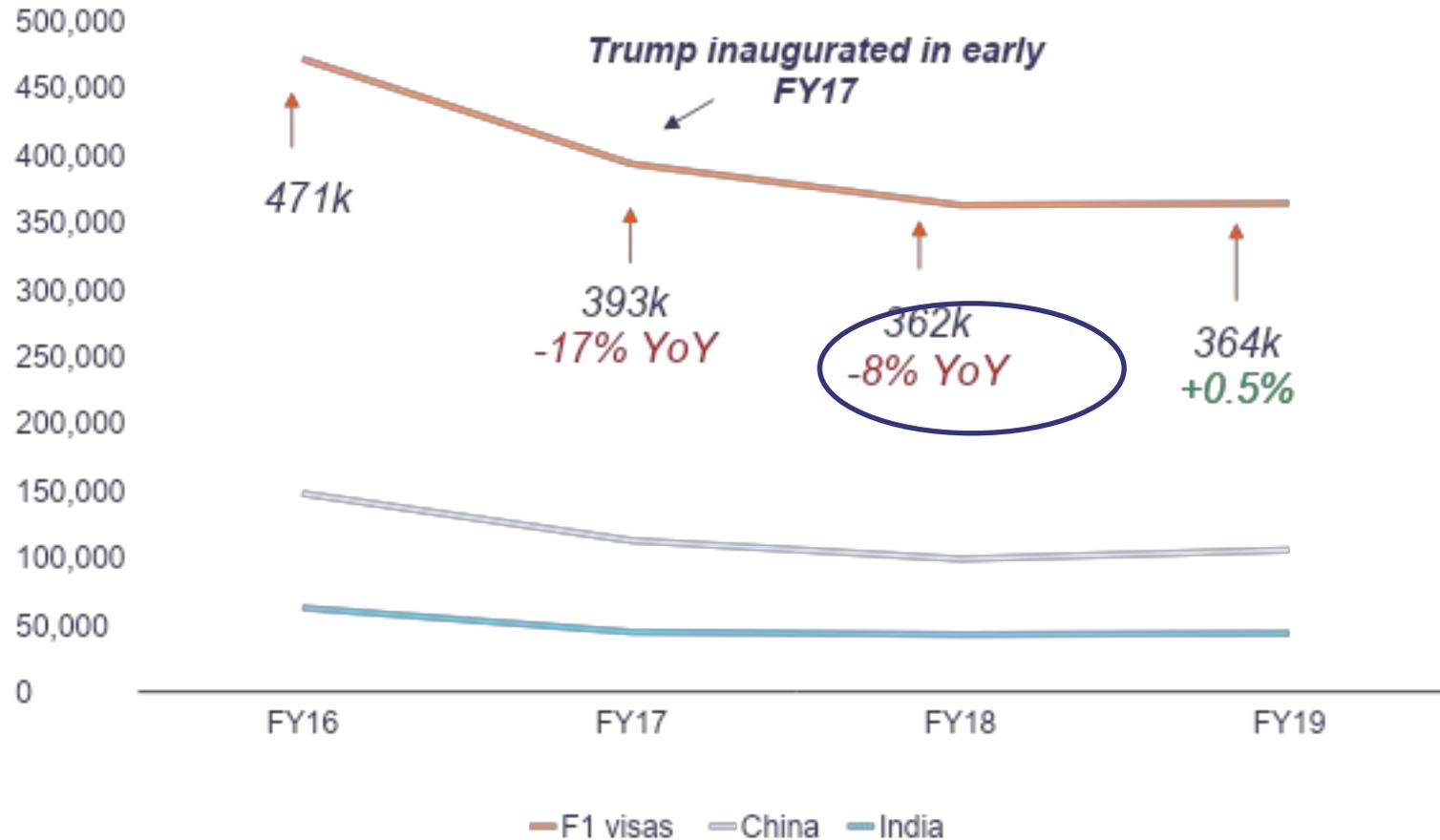
U.S.: early trends (Jan – May) show 15% decline in F1 visas, but these were issued before, well, a *number* of policy changes

Country	% change	Jan - May '25 (F1)	Jan - May '24 (F1)
China	-12%	25,032	28,399
India	-31%	11,484	16,704
Vietnam	0%	4,280	4,285
South Korea	-21%	3,853	4,847
Nepal	-17%	3,832	4,604
Brazil	7%	2,537	2,376
Bangladesh	-1%	2,274	2,308
Japan	-16%	2,240	2,667
Taiwan	-16%	1,845	2,187
Germany	7%	1,746	1,634

Country	% change	Jan - May '25 (F1)	Jan - May '24 (F1)
Mexico	-17%	1,648	1,996
France	-19%	1,630	2,024
Pakistan	11%	1,537	1,383
Italy	-17%	1,472	1,763
Spain	32%	1,449	1,094
Nigeria	-24%	1,370	1,798
UK	7%	1,312	1,225
Colombia	-15%	1,182	1,389
Saudi Arabia	-4%	1,132	1,177
Hong Kong	-6%	889	944



This 15% YTD decline from Jan – May aligns with the 17% drop in F1 visas for the full year of 2017, Trump's first year in office



Source: U.S. State Department

Aug 2025 saw a 19% drop in arrivals by Sept 2025.

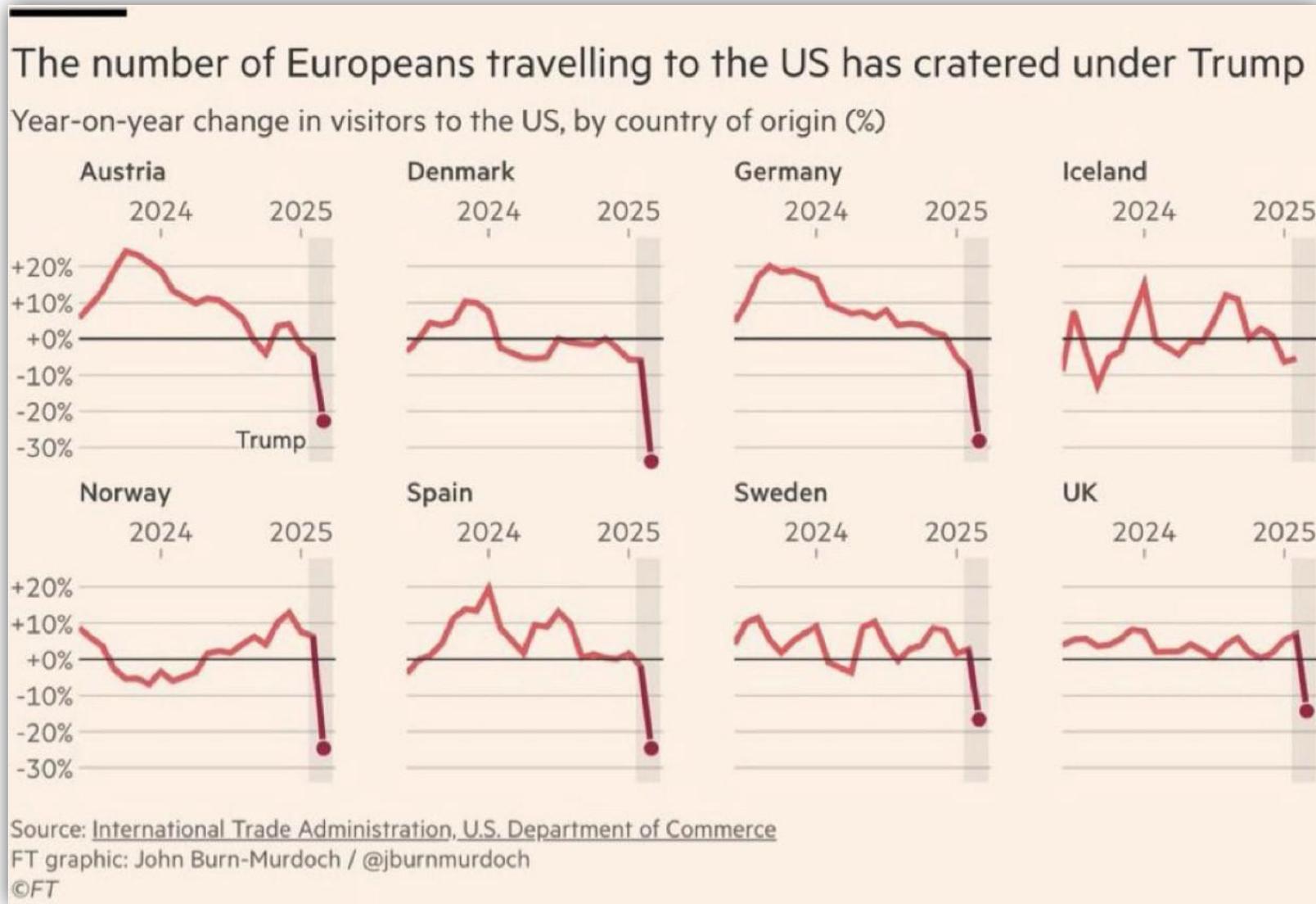
International student arrivals (F1 & M1) in US fell 19% in Aug 2025

PLACE OF RESIDENCE	AUG. 2024	AUG. 2025	CHANGE
▶ Asia	250,740	191,179	-24%
▶ Europe	51,439	50,548	-2%
▶ Middle East	22,896	18,917	-17%
▶ South America	22,183	19,769	-11%
▶ Africa	16,965	11,456	-32%
▶ Caribbean	7,124	6,468	-9%
Mexico (excluding arrivals on land)	6,361	5,719	-10%
▶ Central America	5,555	5,336	-4%
▶ Oceania	3,677	3,746	+2%
Total	386,940	313,138	-19%

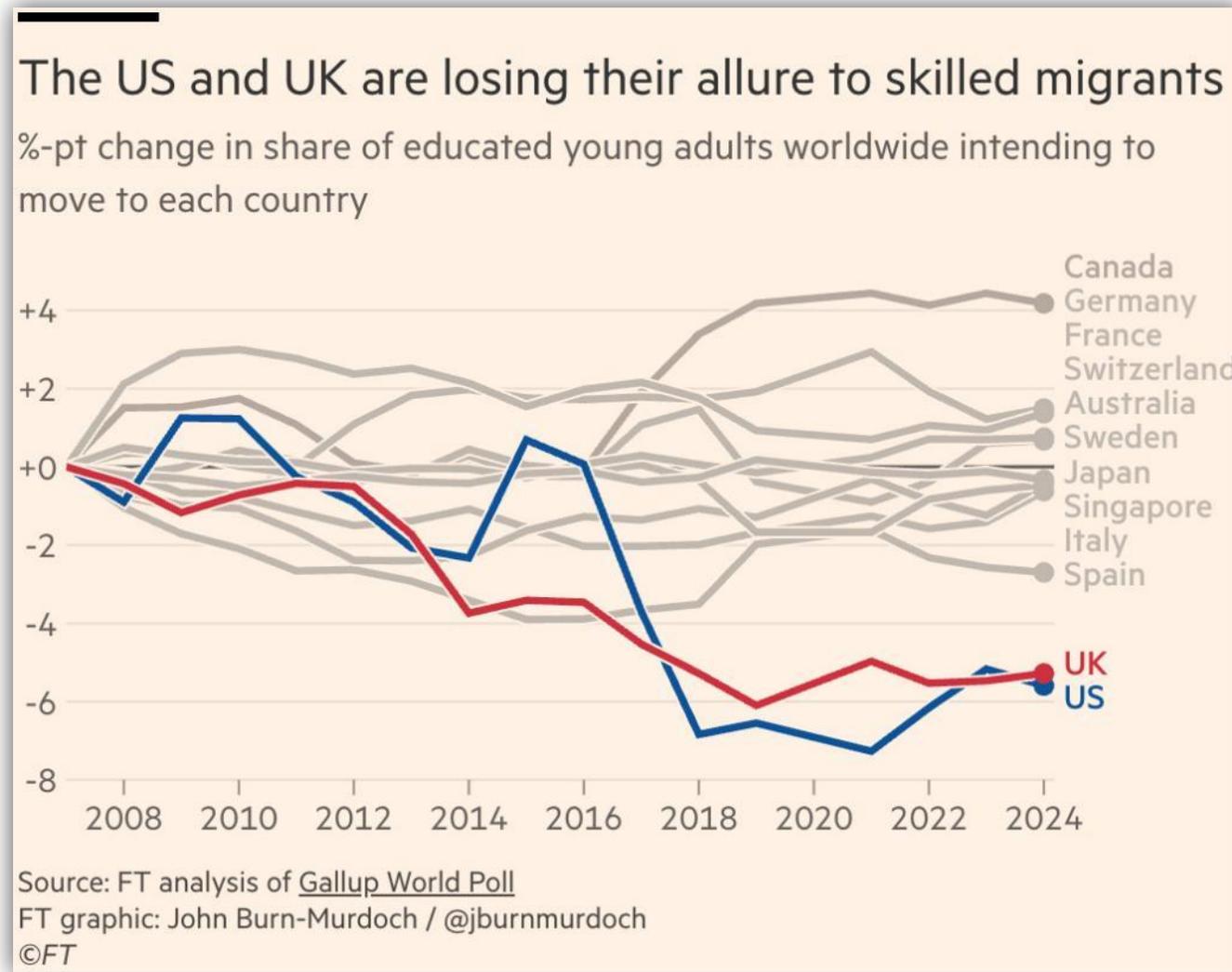
This decline was led by a drop of 24% in int'l students from Asia – a **loss of 59,561 new students** – with Europe (-2%) showing the least significant drop in arrivals.

This data includes both old and new international students.

Decline in European travelers to U.S. illustrates broader trend



More broadly, both the U.S. and UK have lost appeal among skilled migrants since the early – mid 2010s



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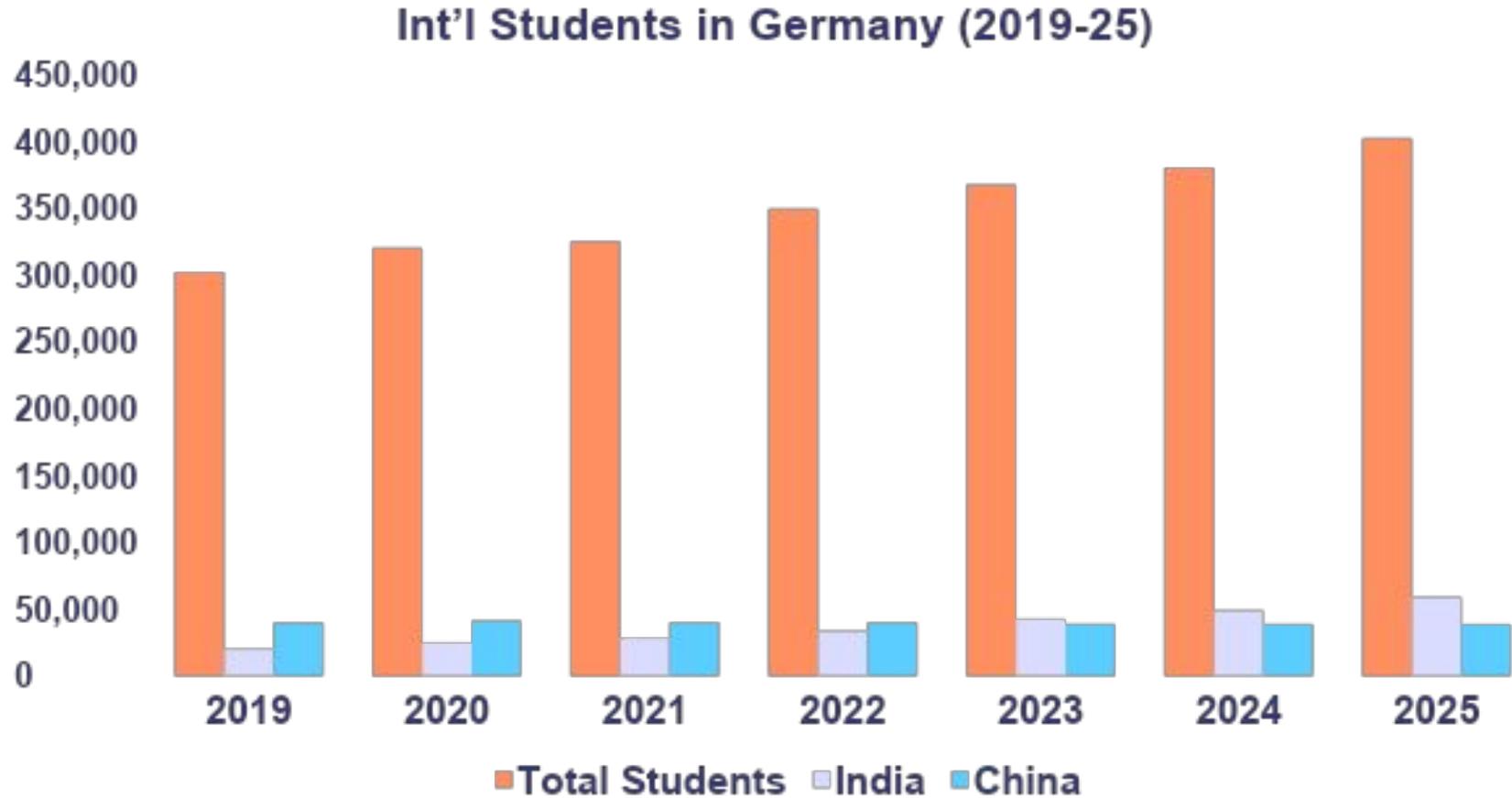
“Emerging” Destinations

Western Europe and East Asia welcome
more students from overseas

Germany's int'l student population is up 33% since 2019, reaching a record high of 402,000 in 2025

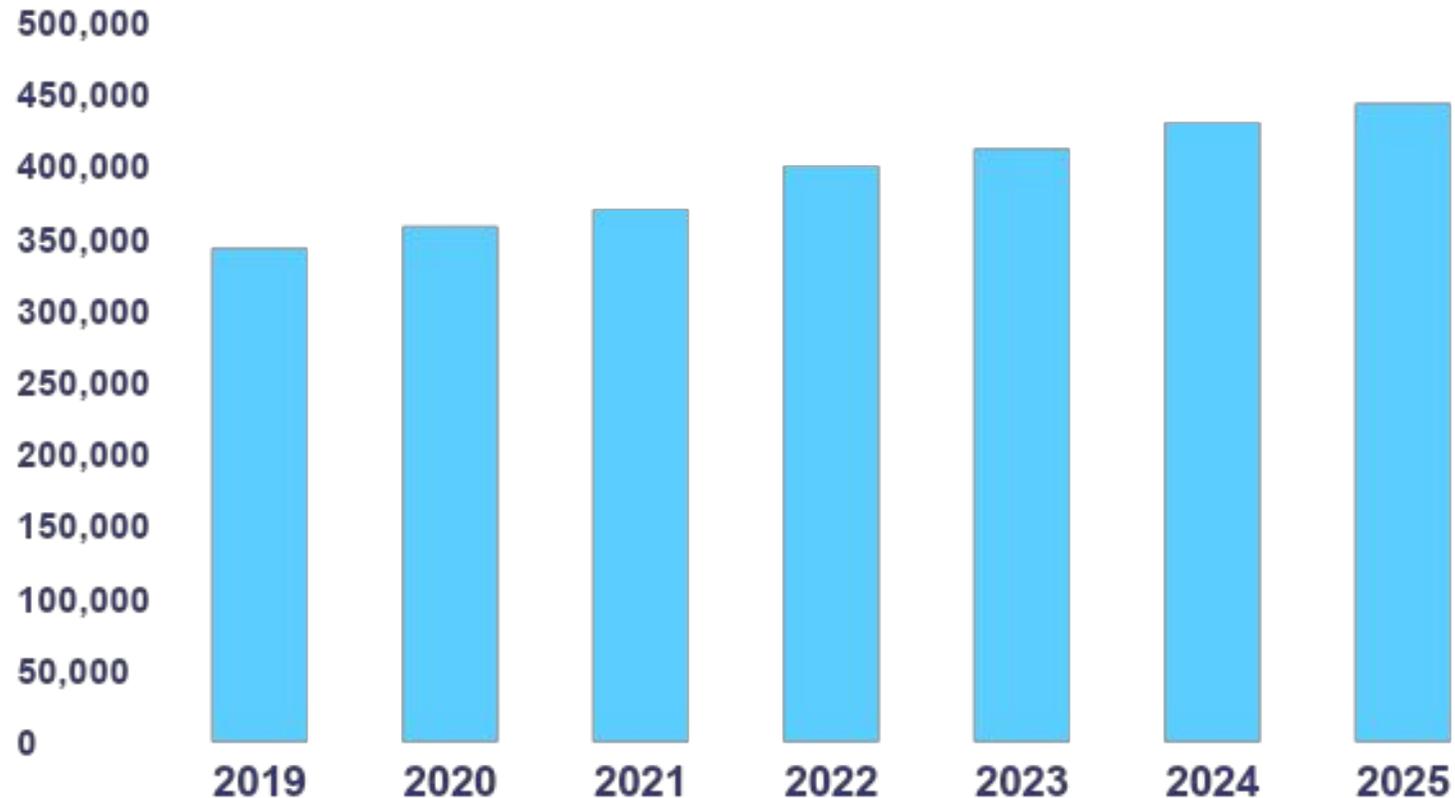
Indian Students:
+187% v. 2019

Chinese Students:
-3% v. 2019



France sees 29% gain in int'l students since '19, welcoming an extra 100k students, up to a total of 443k

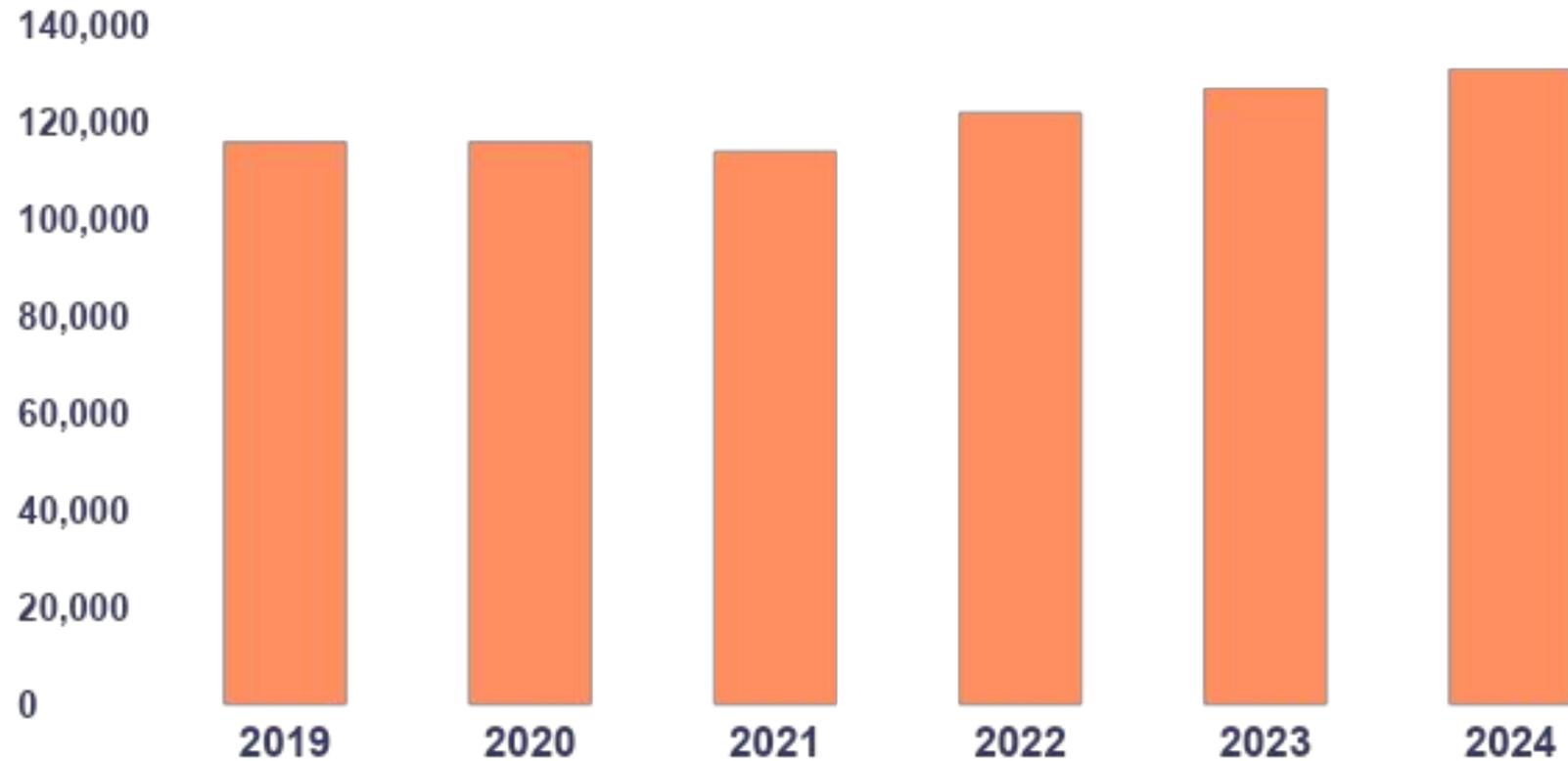
Int'l Students in France (2019-25)



No market represents more than 10% of inbound students; top sending countries are **Morocco** and **Algeria**.

Before recent policy restrictions, The Netherlands' int'l student population grew **13%** between 2019 and 2024

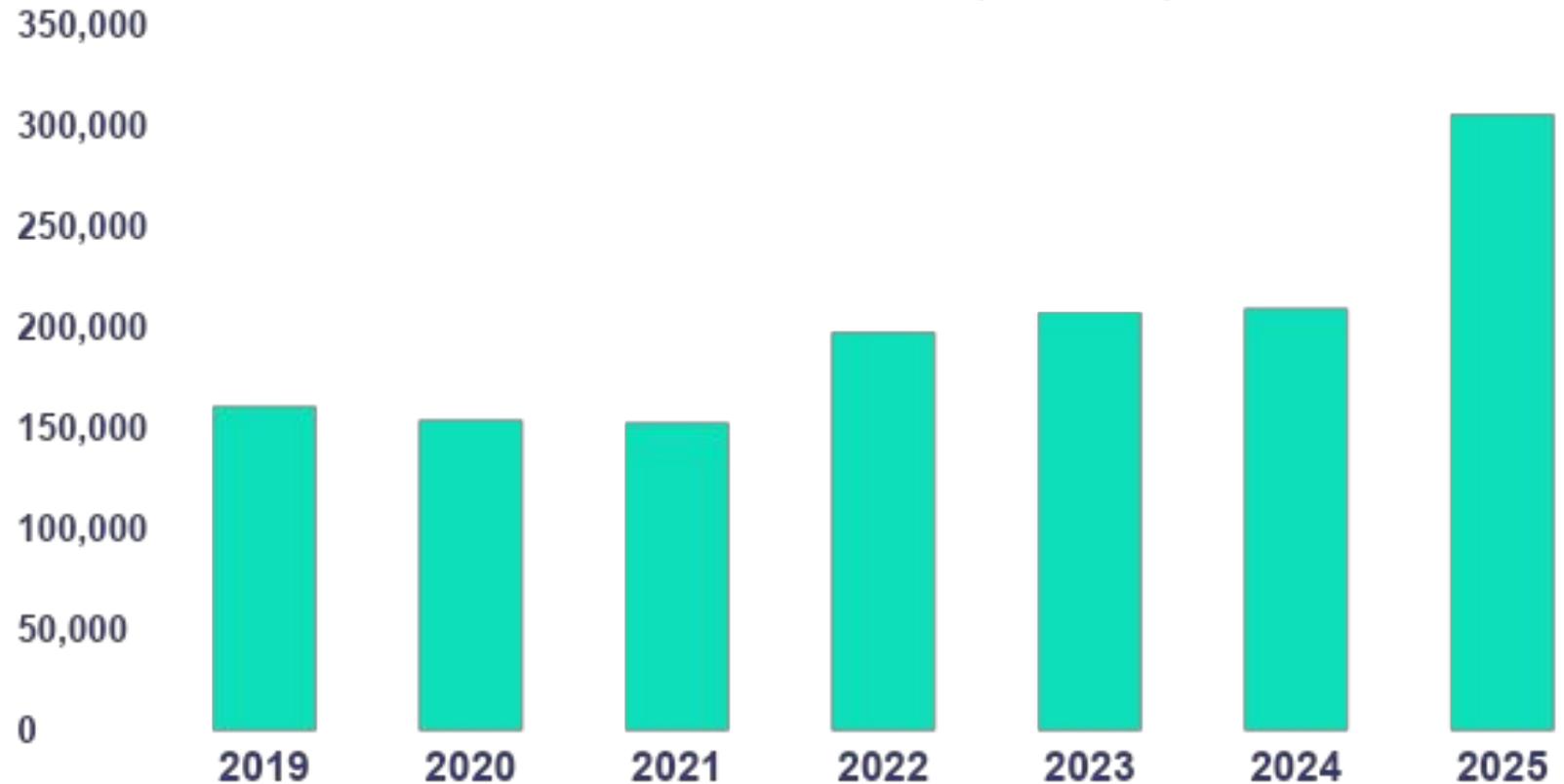
Int'l Students in The Netherlands (2019-24)



More than 75% of int'l students in Holland are European. Due to new restrictions, total volumes likely declined in 2025.

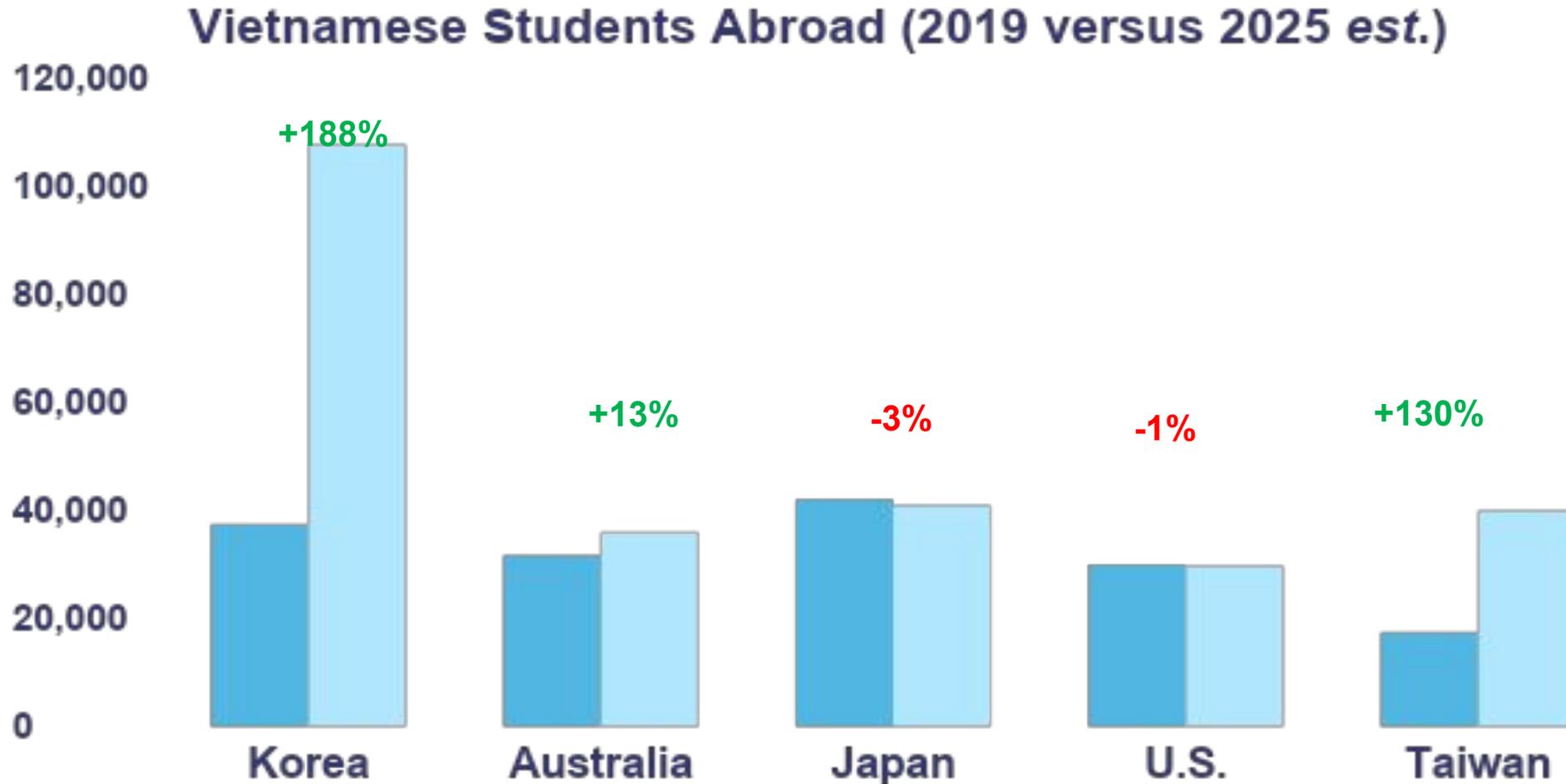
Meanwhile, in East Asia, South Korea's int'l student pop. grew 90% since 2019, adding 144,000+ students

Int'l Students in Korea (2019-25)



More than a third of Korea's overseas students are from Vietnam. About 86,000 are from China.

A few notes on Vietnam: Thanks to rising wealth, more students are going abroad, but opting for regional destinations



Vietnam's region-leading economic growth will likely foster more demand for education abroad

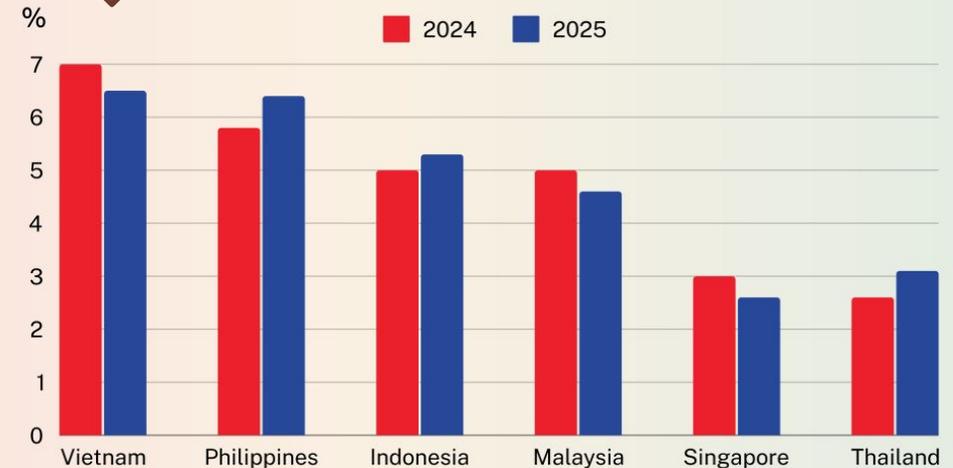
Vietnam's annual GDP growth

(Year-on-year change, in percent)



Source: National Statistics Office of Vietnam

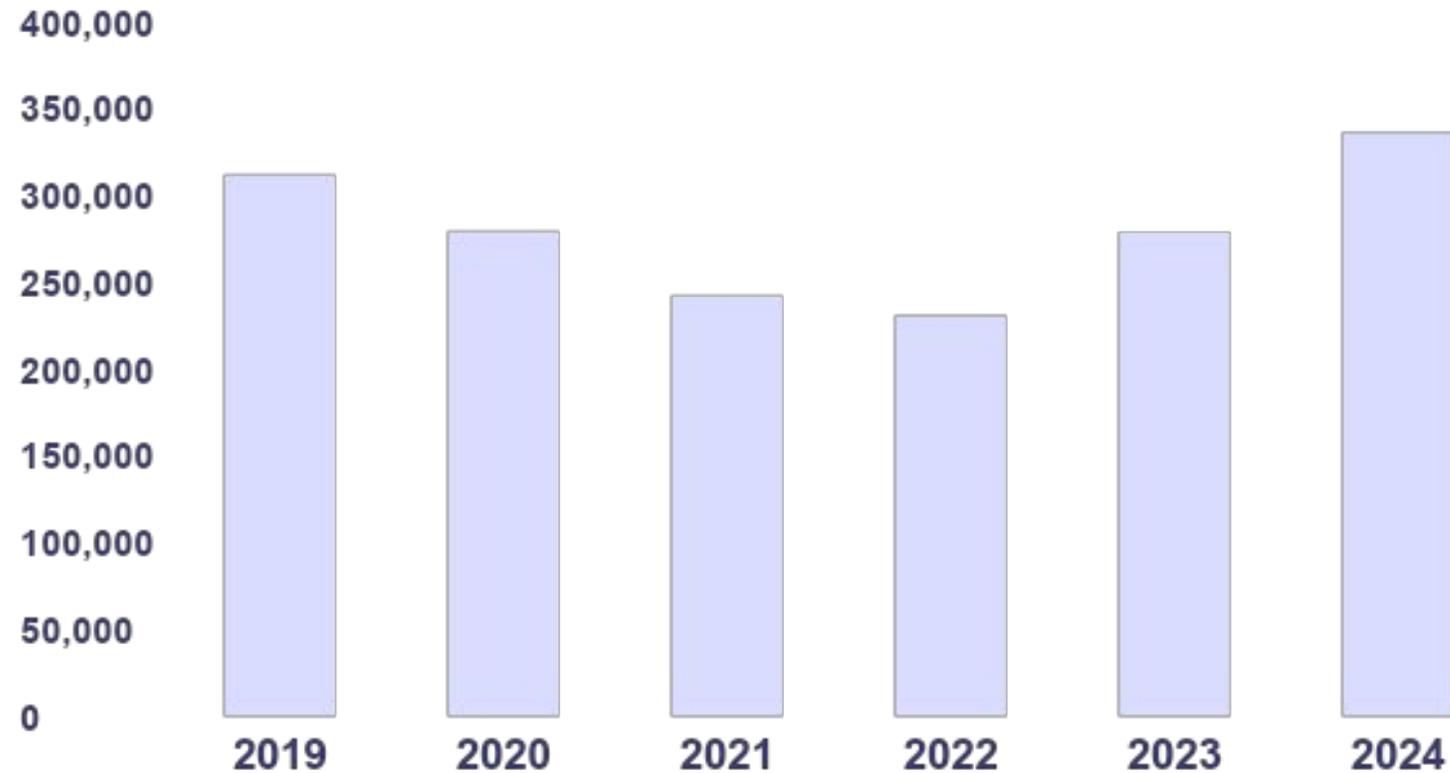
Forecast of GDP Growth for Southeast Asian Countries



Source: VNEExpress, HSBC

Japan's int'l student population is up just 8% versus 2019, but the country plans to welcome 400k students by 2033

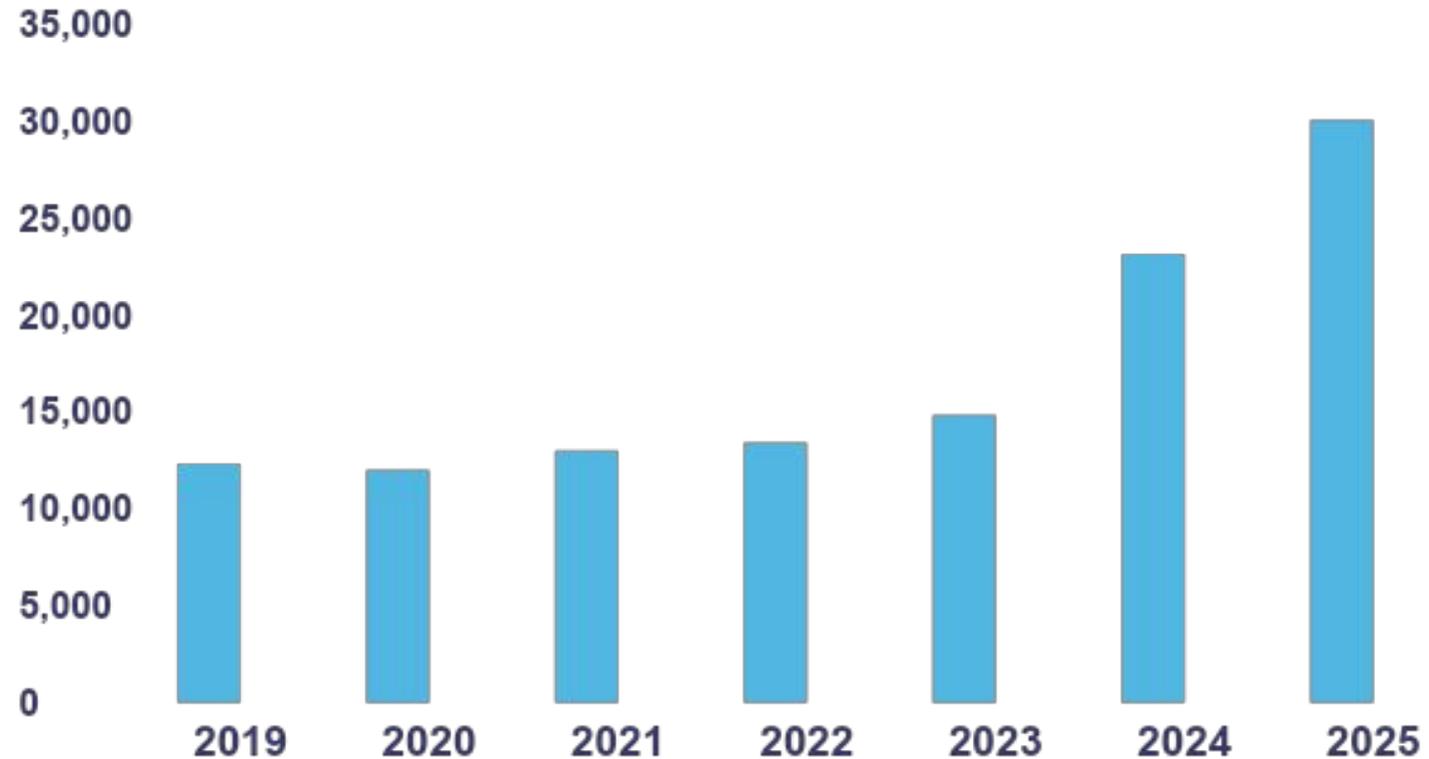
Int'l Students in Japan (2019-24)



Chinese students account for about 40% of Japan's overseas students, followed by Nepal and Vietnam (each at 13%).

In Hong Kong, int'l student numbers grew **+144%** since 2019, driven by focused gov't policies

Int'l Students in Hong Kong (2019-25)

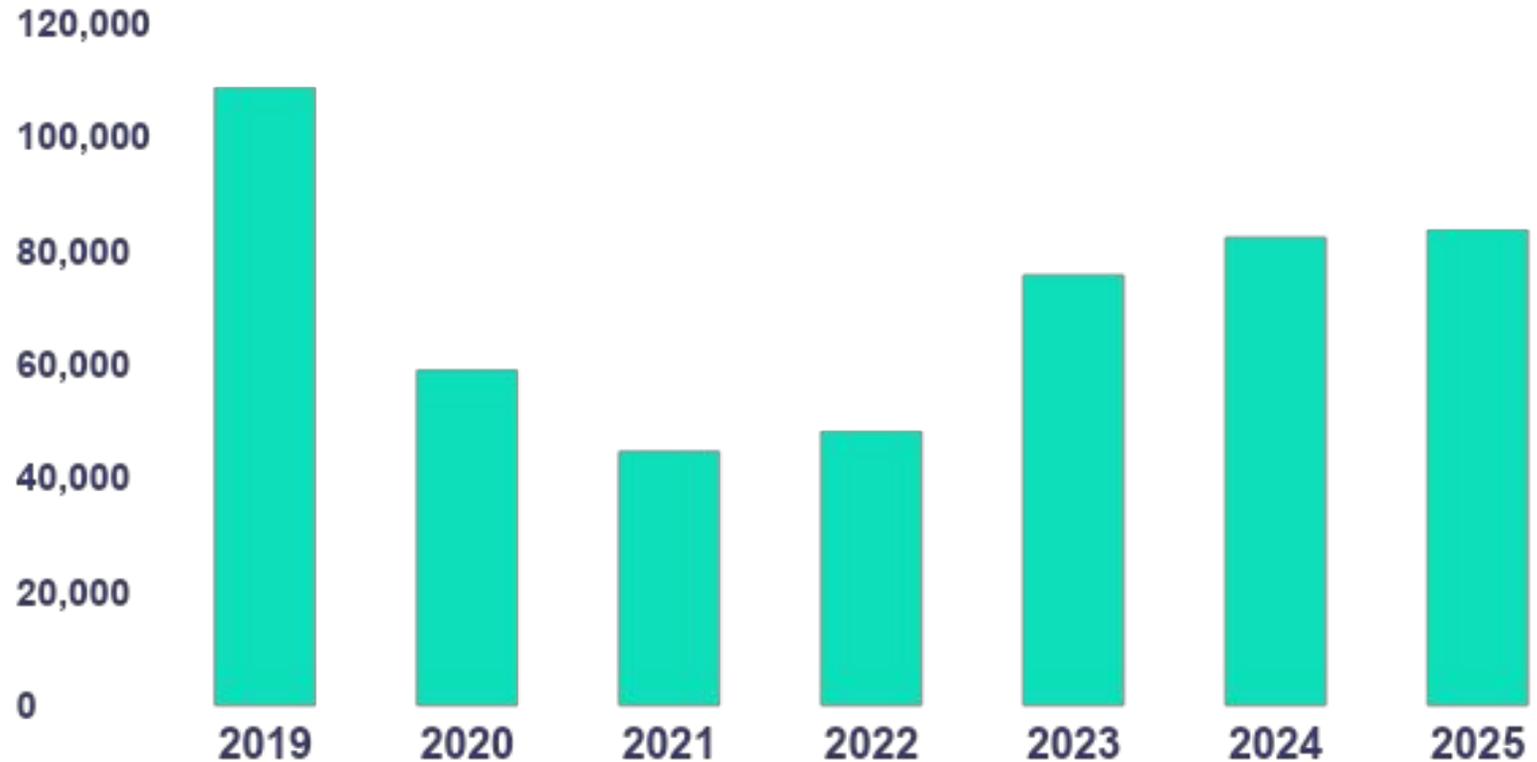


In '23 and '25, Hong Kong boosted the % of int'l students allowed to attend public universities.

Roughly **75%** of int'l students are from **mainland China**.

New Zealand's pool of int'l students is down by **23%** since '19, but sector is aiming for slow, steady growth

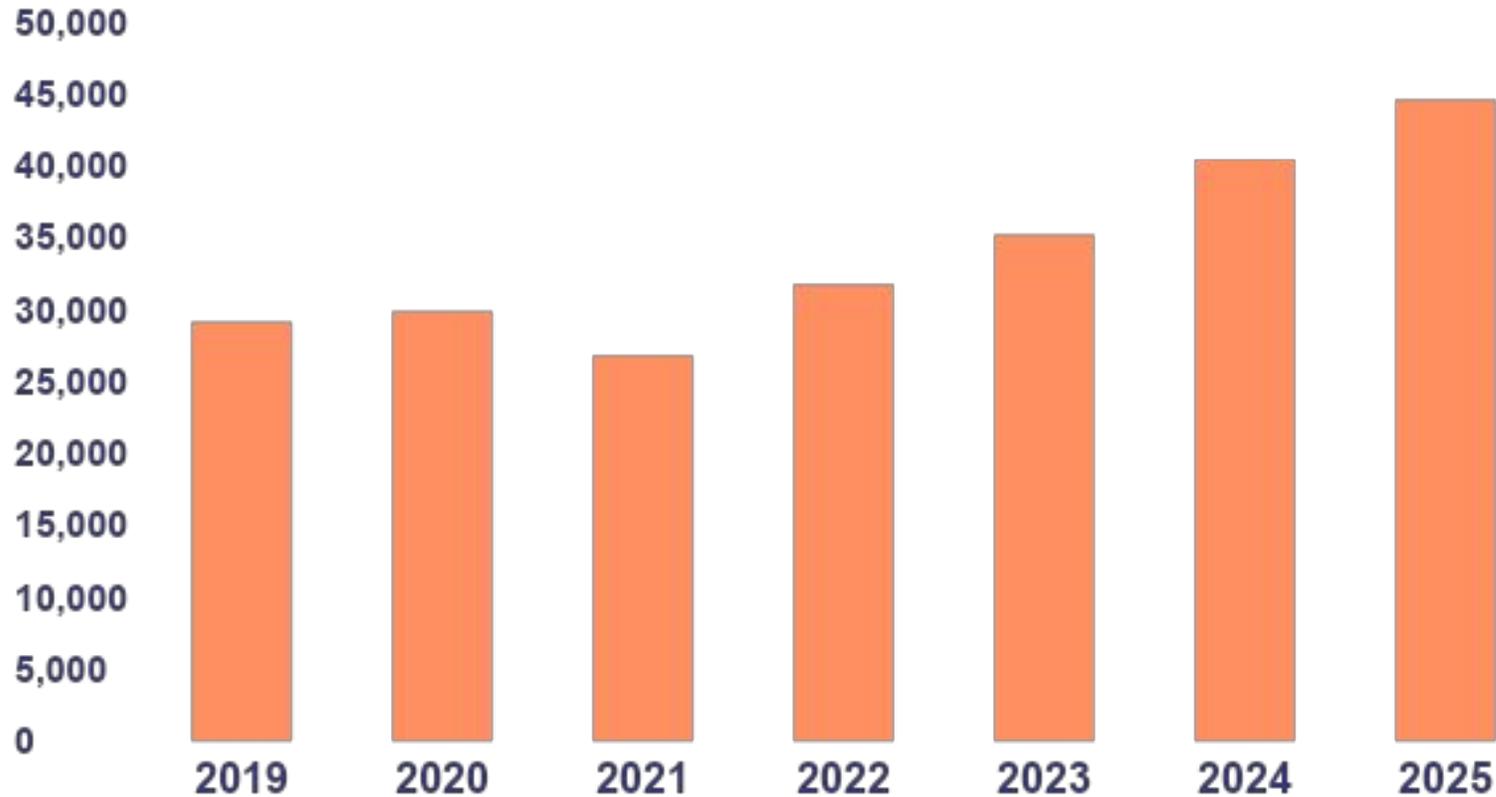
Int'l Students in New Zealand (2019-25)



While COVID restrictions decimated the sector, NZ does plan to welcome nearly 120k int'l students by 2034.

Ireland's int'l student pop. is up 53% since 2019, but this only represents an extra 15,000 students

Int'l Students in Ireland (2019-25)



India is the leading sending country, with more than 9,000 students in Ireland – twice as many as **China**.

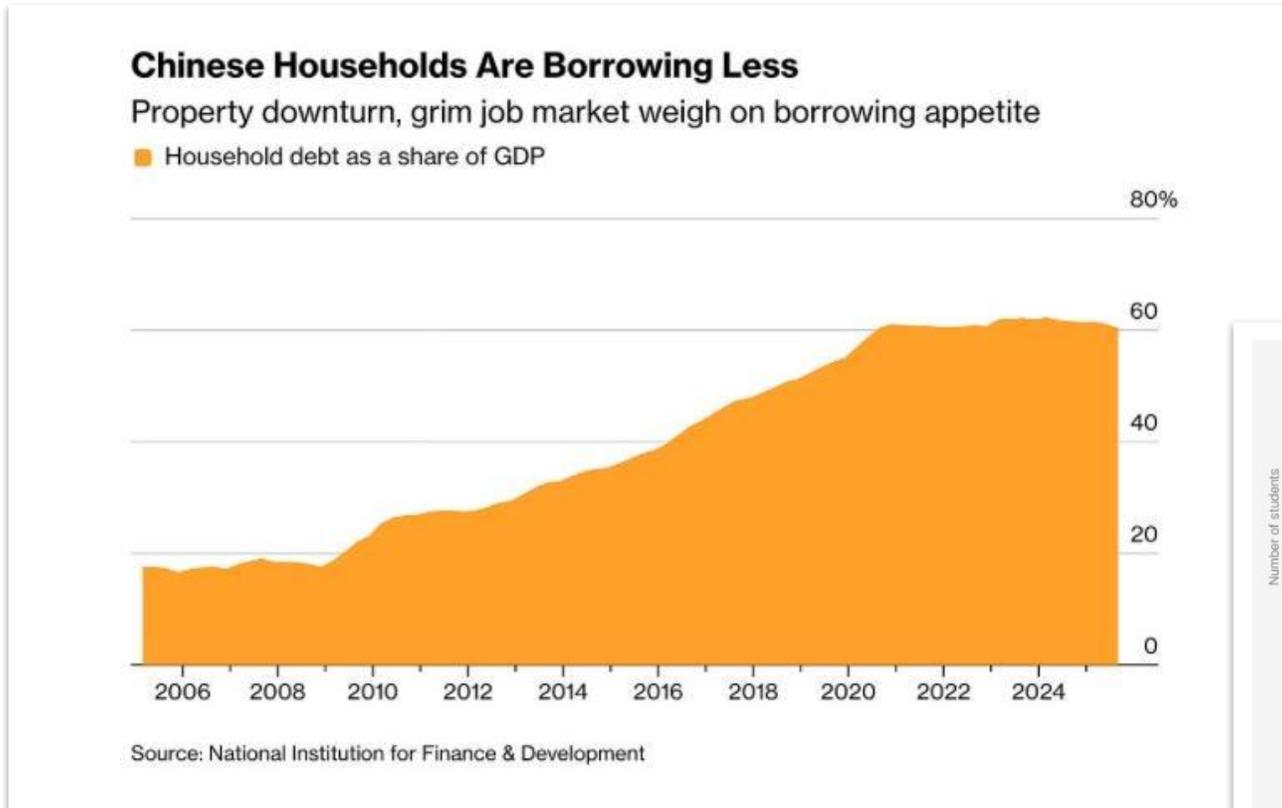
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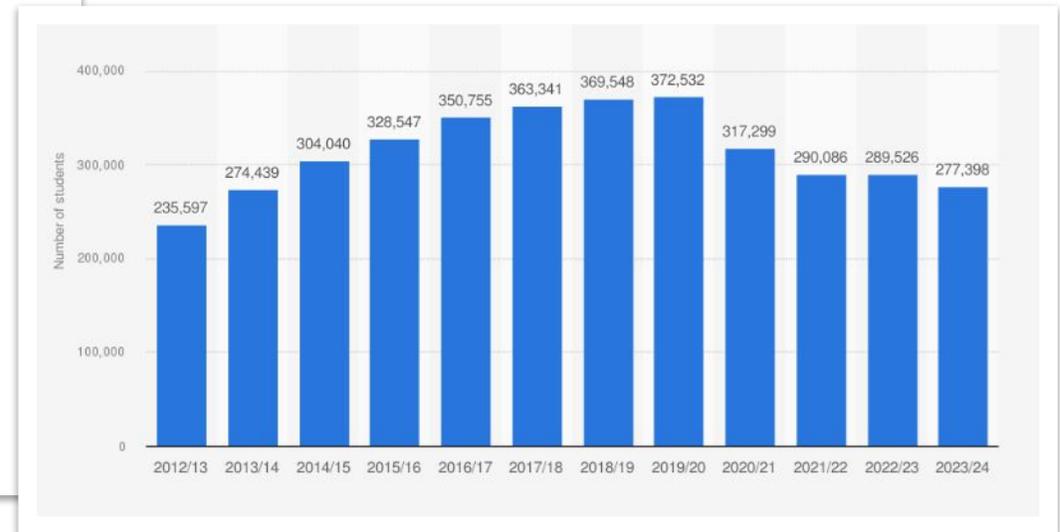
China & India

A few thoughts on outbound trends from the top source countries

An economic trend worth watching: Chinese families' ability to take out loans has plateaued since '20

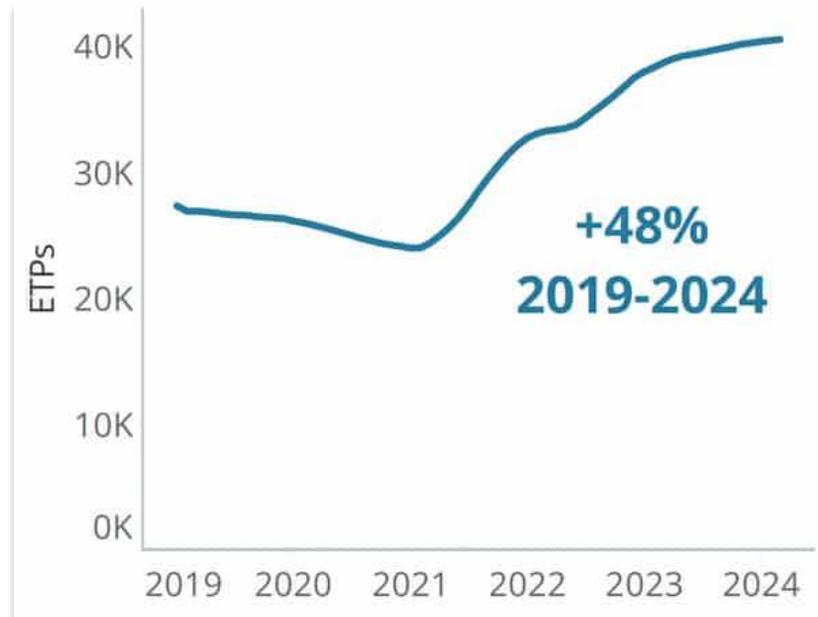


Relatedly, the number of Chinese students in the U.S. from 2012 to 2024 has followed a similar trajectory.



Outside the “Big Four,” universities with strong English-taught programs are gaining more appeal

The number of English-taught programs (ETPs) outside the “Big Four” has **tripled since 2014**; up nearly 50% since 2019.



B Bloomberg 📍 @business · 7h ...

So many Chinese parents have been visiting Singapore universities in recent months, some colleges have had to resort to crowd control measures on campus.



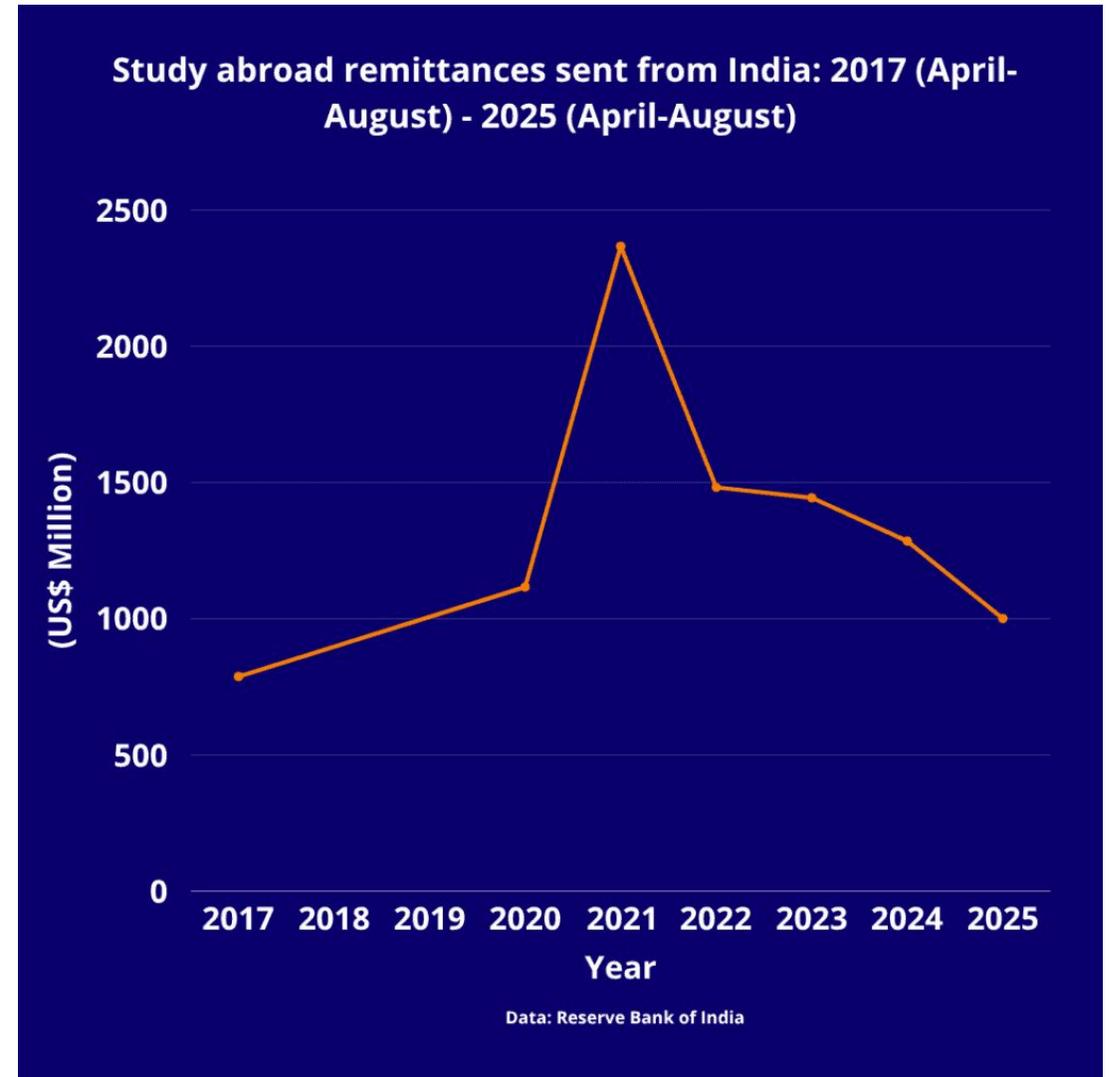
Singapore Colleges Are New Travel Hotspot for...

From bloomberg.com

The volume of ETPs in **Asia** may pass the number of ETPs in **Europe** by 2030. Singapore (see above) illustrates this trend.

India's outbound growth is lowest in eight years

- In India, study abroad remittances – money sent overseas for education expenses – **fell by \$1.4 billion (nearly 58%)** between summer 2021 and the same period in 2025.
- Today, **more than 100,000 Indian students** are in Europe (with Germany alone hosting 60,000) – this number is expected to grow over the next few years.
- In 2025, **76,000 fewer Indian students** went abroad (down to 1.25M), according to the Ministry of External Affairs.



As demand grows globally...
How is Canada's policy
environment shaping student
decisions?

The Great Destination Re-Shuffle: What Immigration Signals Are Telling Us

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Disclaimer



This presentation is for general informational and educational purposes only and does not constitute legal advice. Immigration laws, policies, and program criteria are subject to continual change.



Please refer to the official **IRCC** website for the most up-to-date information. Individual eligibility and outcomes vary based on personal circumstances.

The Key Question- Are students disappearing... or re-routing?

International students today are making **more strategic decisions than ever before.**

They are evaluating destinations based on:

- Study permit approval likelihood
- Post Graduation and Spousal Open Work Permit Eligibility
- Permanent Residence Pathways
- Policy Stability

Students are choosing pathways — not just destinations.



Canada's Policy Reset

Canada is intentionally managing temporary resident growth

Recent federal direction focuses on:

- Managing the growth of temporary residents
- Increasing integrity of the international student system
- Aligning study pathways with labour market needs

Key policy tools include:

- Study permit caps
- Study Permits tied to schools
- Provincial Attestation Letters (PAL/TAL)
- PGWP eligibility changes including changes for Curriculum licensing agreements (public-private partnerships)
- Spousal Open Work Permit Eligibility changes

2026-2028 Immigration Levels Plan (Temporary Residents)

	2026	2027	2028
Overall Arrivals	385,000 (375,000 – 395,000)	370,000 (360,000 – 380,000)	370,000 (360,000 – 380,000)
Workers (Total)	230,000	220,000	220,000
International Mobility Program	170,000	170,000	170,000
Temporary Foreign Worker Program	60,000	50,000	50,000
Students	155,000	150,000	150,000

Canada's Immigration Policy Shift

From Rapid Expansion → Stabilization



Immigration Levels Plan



2023 Plan

500,000 PRs annually by 2025



2025–2027

395,000 → 380,000 → 365,000



2026–2028
Plan

Stabilization around ~380,000

Policy direction:

- Manage temporary resident growth
- Stabilize permanent immigration
- Align immigration with housing and infrastructure capacity

Why This Matters for Students



Students interpret immigration signals as **risk indicators**.

Policy change → student perception

Study permit caps → “Harder to get in”

PAL/TAL requirement → “More paperwork and uncertainty”

PGWP eligibility restrictions → “Program choice matters”

Even when policies are technical, the perception spreads quickly across student networks.

International Student Trends in Canada

Recent Data Signals a Major Shift

 **53%** Fewer New International Student Arrivals in 2025 vs. 2024

 **361,935** Fewer Students

 **61%** Decline in New Student Arrivals *December 2025 vs. December 2024*

Temporary Resident Snapshot (Dec 31, 2025)



Study Permit Holders

461,565



Work Permit Holders

1,463,805



Study & Work Permit Holders

229,650

Source: IRCC — Students & Workers Statistics

Canada's international student system is contracting significantly following recent policy changes. Students and institutions are responding to a more competitive and regulated environment.

Policies That Increased Friction

Recent policy changes have introduced **additional complexity across the international student and temporary worker systems.**

International Students

- **Study permit cap introduced in 2024**, with further reductions planned for **2026–2027**
- **Acceptance letter verification now mandatory** to prevent fraud
- **Higher financial proof requirements** for study permit applicants

Post-Graduation Work Permit (PGWP): Eligibility tightened to better align programs with immigration and labour market needs

Spousal Work Permits: Eligibility narrowed for spouses of international students and temporary foreign workers

Temporary Foreign Worker Program: 10% cap on low-wage hiring (20% in certain sectors) and Applications paused in regions with **≥6% unemployment**

Future Direction: Further reductions in new student and worker arrivals planned for 2026–2028

Permanent Residence Pathways: More targeted PR pathways, with increased emphasis on Francophone immigration outside Quebec

Key Signal: Canada is shifting from rapid expansion → managed and regulated growth.

Policies That Reduce Friction

Not all recent policy changes increase barriers. Some measures aim to **facilitate mobility and advanced study pathways**.

Faster Processing for Doctoral Students

- Doctoral study permit applications may be **processed in as little as 2 weeks**.

PAL/TAL Exemption for Graduate Programs

- Starting **January 1, 2026**: Students applying to **master's or doctoral programs at public institutions do not require a Provincial or Territorial Attestation Letter (PAL/TAL)**. *Students planning to study in Quebec must still meet provincial requirements.*

Joint Program Flexibility

Students enrolled in **joint programs leading to a single credential**:

- **Do not need a new study permit** when moving between participating DLIs
- The primary DLI issuing the credential must confirm admission and academic progression
- The primary DLI reports enrolment and attendance for compliance purposes

Signal: Canada continues to **support graduate education and collaborative academic programs**.

Canada's Structural Advantage

Despite tighter controls, Canada still offers:

A relatively structured pathway

- Study → Work → Permanent Residence

Few major destinations offer:

- Post-study work opportunities
- Express Entry pathways
- Provincial nominee programs

Canada may no longer be the **easiest option**, but it remains **one of the most complete pathways**.



What Institutions Can Do Now?



Institutions do not need to wait for policy certainty.



Practical strategies:



Prioritize transparency

Students value honest guidance more than optimistic marketing.



Strengthen pathway design

Language → programs → employment outcomes



Connect education to employability



Students increasingly ask: “What happens after graduation?”

Rebuilding Student Confidence

Three signals
matter most to
students:

1. Clarity

Clear program
pathways and
immigration
implications.

2. Credibility

Alignment between
marketing and
reality.

3. Continuity

Confidence that
rules will remain
stable long enough
to complete studies.

Institutions that communicate these signals will **retain trust even in uncertain policy environments.**

Final Takeaway



Students are not disappearing.



They are **becoming more strategic.**



Destinations that succeed will be those that:

Provide **clear pathways**

Reduce **uncertainty**

Align education with **long-term opportunity**



Canada still has strong fundamentals — but institutions must help translate policy signals into **confidence for students.**

LinkedIn Weekly Newsletter



Thank you!
Any Questions?

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a

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If students are choosing
pathways, not just
destinations...

How are institutions responding?

An institutional perspective from ILAC

Operational Challenges

Forecasting

Program offering

Space planning

Teacher hiring

Visa

PAL allocation

Changing policies



Enrollment Volatility & Market Uncertainty

Drastic Decline in International Students: New international student arrivals fell by roughly 61% in 2025.

Federal Policy Impact: Changes in 2024 and 2025, including caps on study permits and tighter restrictions on work permits, have caused "significant and substantial" decreases in enrollment, particularly in colleges.

College vs. University Impact: Colleges are anticipated to face steeper declines, with projections suggesting a 20.6% drop over the next five years compared to a 2.2% decline for universities.

Financial Strain: The reduction in international students, who pay higher tuition, has created significant budget gaps, with one college reporting a \$4.7 million shortfall in 2026.

Domestic Enrolment Shifts: While international numbers are falling, domestic enrolment faces its own challenges, with stagnant or falling numbers, particularly in rural areas.

Market Uncertainty

Drastic Policy Shifts & Caps: The government has introduced strict caps, resulting in a forecasted 10% decline in enrolments for 2025 and 2026, dropping to 155,000 new spots in 2026 from over 650,000 in 2023.

Volatile Visa Procedures: High rejection rates (e.g., nearly 80% for Indian students in Q2 2025) and long, unpredictable processing times for study permits and postgraduate work permits have created a "fear and uncertainty" environment, discouraging applicants.

Reputational Damage: Experts report that "Brand Canada" has taken a "huge hit," as the country is no longer seen as a welcoming destination, leading to a shift in global student mobility away from Canada.

Financial Instability for Institutions: Universities, which heavily rely on international tuition (often 3-4x domestic rates), are facing budget shortfalls, program cuts, and potential staff layoffs.

Housing & Affordability Crises: International students face intense pressure from high costs and housing shortages, making Canada less attractive than competing, more affordable, or more predictable destination

Adjustment of programs- strategic considerations

Academic Impact

- Stronger comprehension, active participation, and improved assessment performance
- Greater likelihood of academic progression and timely graduation
- Increased confidence in engaging with teachers and peers

Career Impact

- Broader access to meaningful employment and co-op opportunities
- Stronger performance in interviews and workplace communication
- Greater readiness for global career pathways

Social Impact

- Smoother integration into campus and community life
- Increased participation in extracurricular and co-op experiences
- Higher overall student satisfaction and sense of belonging

Adjustment of programs- strategic considerations

- Understanding the (new) Market
 - Changing student profiles
 - Geography (visa approvals)
 - Demography (e.g., age)
 - Student goals (e.g., high education, immigration)
 - Financial constraints
 - Increased competition
 - Technology (e.g. online, AI)
 - Other destinations
 - Source country

New partnerships and pathway models

- Product & Delivery
 - Flexible pathways
 - Integrated academic + language support
 - Hybrid and outcome-driven models

Operational considerations

- Quality & Outcomes
- Measurable academic success
- Employment readiness
- Long-term student satisfaction
- Student experience
- Student life

Thoughts about partnerships

- **Accelerating Growth through Collaboration**

Strategic partnerships combine strengths to accelerate growth, innovation, and service quality beyond individual capabilities.

- **Trust as a Foundation**

Trust and aligned values transform challenges into opportunities, strengthening long-term collaboration.

- **Adaptive and Open Mindsets**

Successful partnerships require adaptive thinking, openness to learning, and commitment to navigating differences constructively.

- **Unlocking Strategic Advantages**

Well-nurtured relationships unlock efficiencies, enhance diversity, broaden presence, and drive innovation.

Stay in Touch



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