

The Australian Population Research Institute, November 2024



Labor fails to control the overseas student intake. The rental crisis will worsen

David McCloskey

Bob Birrell

The Australian Population Research Institute <tapri.org.au>
PO Box 12500
Middle Camberwell
Victoria 3143
Australia

ACKNOWLEDGEMENTS:

The authors would like to acknowledge the support and contributions of:

- Tactician Corporation for mapping and spatial analysis software

ABOUT THE AUTHORS:

David McCloskey is CEO of Mimesis Labs, a digital technology business, and a Research Associate of the School of Media, Film and Journalism ARC Centre of Excellence for Automated Decision Making + Society at Monash University, and is a member of the Australian Population Research Institute (TAPRI).

He has worked extensively in demography and social analysis, including geo-demography, big data and machine learning across health, housing, transport and smart cities initiatives.

He is currently leading the development of synthetic population modelling techniques for use in comparative economic analysis, insights into the structure of communities, and the dynamics of social, economic and demographic changes in society.

Bob Birrell (PhD Princeton – Sociology) was Reader in Sociology and the founding director of the Centre for Population and Urban Research at Monash University.

He was the joint editor of the demographic journal *People and Place* (with Katharine Betts) from 1993 to 2010. He is currently the head of the Australian Population Research Institute (Tapri), an independent think tank on population and related issues.

Contacts:

David McCloskey, 0419 899 768

david.mccloskey@mimesis.labs,

david.mccloskey@monash.edu

Bob Birrell, 0413 021 126

bob.birrell@tapri.org.au

Articles published by The Australian Population Research Institute may be republished provided the Institute and its writers are appropriately credited, and a link is made to our website <tapri.org.au>

Table of contents

Preamble	1
Labor fails to control the overseas student influx.....	3
The setting.....	3
Labor’s December 2023 initiative	3
Why the student component of NOM is so important	5
The Federal Labor Government’s ‘genuine student’ policy	6
The backlash.....	7
The Labor Government responds	9
The student influx and the demand side of the housing crisis	13
The projected rental housing impact of overseas students for Sydney and Melbourne.....	14
Demand and supply of rental accommodation for overseas students in Sydney and Melbourne	17
Reforming the university system	18
Appendix	20
Dwell patterns of temporary residents on student visas living in Greater Sydney in 2021	20
Dwell patterns of temporary residents on student visas living in Greater Melbourne in 2021	21
Map 1: Distribution of temporary migrants (on student visas) renting accommodation in Greater Sydney in 2021.....	22
Map 2: Distribution of temporary migrants (on student visas) renting accommodation in Greater Melbourne in 2021	22
Notes	23

Preamble

On November 18, the Coalition announced that it would not support the Labor Government's legislation to allow quotas to be set for student visa numbers, including individual caps for each university. The legislation will now probably not become law.

Where to next? This report provides the background needed to assess what is likely to happen to the overseas student industry and the implications for the rental crisis.

We show that since December 2023 when the Labor Government announced it intended to restrict the number of student visas in the interest of taking pressure off the housing crisis, the Government has backtracked.

In response to a backlash from the overseas student industry, Labor's policy has become to hold the issuance of visas at previous high levels. To do this it gave the Department of Education the task of setting a National Plan for student visa numbers and of allocating them via quotas stipulated for each university provider.

The Plan was set for 270,000 in 2025 and the quotas have already been allocated. They restored the numbers to most of universities affected by the initial downturn.

Labor, having already blinked in the face of the backlash will not turn back to its 2023 position of reducing the student influx. Instead, it will stick with its National Plan and give the Department of Home Affairs the task of achieving the target number of new visas.

In the process the DHA will probably have to give up on the 'genuine student' selection strategy it put in place in December 2023. It was this strategy, which led to a contraction in the numbers visaed and which prompted the backlash. We estimate that the likely total visa outcome will be close to the very high 2023 level.

In this report we detail the initial impact of the tight visa policy, the scale of the subsequent backlash and the Labor Government's response. Labor changed course during 2024. It jettisoned its restrictive visa policy.

The task of setting overseas student visa numbers and of allocating them across each sector student and each university provider visas was shifted to the Department of Education (DOE). Its Minister, Jason Clare, set about restoring the university sector, though not the Vocational sector.

The overseas student industry and almost all commentators have proclaimed that these quotas restricted the overseas student influx. They did not.

The matter is serious. Labor was right in December 2023 when it assumed that overseas students are a major contributor to the housing crisis, especially the rental

component. We explore this impact for the student influx that Labor had been planning for and will probably continue to pursue.

The analysis shows that, in Sydney and Melbourne, the annual net influx of these students alone, would need additional rental accommodation larger in volume than the total current annual number of medium and high density starts in the two cities. The outlook is that the rental crisis will get worse.

Labor fails to control the overseas student influx

The setting

Australia's housing crisis is now, quite rightly, regarded as the most serious issue facing the Australian electorate. There are far more households seeking rental and owned properties than there are affordable dwellings. Meanwhile on the supply side the construction of new dwellings is lagging way behind demand.

In a recent report, we focussed on the causes of the home ownership affordability crisis.¹ We showed that demand from investors, upgraders as well as aspiring new home owners (who included a huge bank-up of earlier arriving migrants) was putting home ownership out of reach of most aspirants.

In this report we focus on the current hotspot in the crisis; the lack of affordable rental accommodation. Rental is the entry point to the housing market for most new households. It is now blocked for many, and for others it is so expensive that they are struggling to raise the funds to move into the home ownership market.

Although marginal gains were reported in Sydney rental vacancies in September 2024 (rising 0.1% to 1.9%) the CEO of the Real Estate Institute (NSW) stated that marginal increases, particularly in the Sydney area, should not be interpreted to mean that rental affordability issues are easing. "These slight increases do not dent the escalating rental crisis," he said. "Demand continues to drastically outstrip supply and securing appropriate rental accommodation remains a pipedream for many tenants as weekly rents continue to rise"²

It is an urgent priority that the pressure is taken off the rental entry point to the housing market. Our focus in this paper is on the demand side. The most feasible option for relieving demand is a reduction in the overseas student influx. We detail the scale of this influx and its impact on the rental market, mainly in Sydney and Melbourne.

The Australian Labor Government made a similar judgement in late 2023. It announced measures to curb the student influx with the intent being to diminish rental demand. Unfortunately, the backlash from the overseas student industry and its supporters has prompted Labor to change its course. Its present policy is to maintain the student influx rather to curtail it.

Labor's December 2023 initiative

During 2024, debate raged about the impact of the Federal Labor Government's late 2023 policy decisions. Labor declared at that time that henceforth the number of new overseas student visas would be restricted. The method chosen was to favour those student visa applicants judged to be signing up for an educational credential (the 'genuine student' test) and to deter those judged to be intending to use their student visa as a means to access the Australian labour market.

The measure soon led to a contraction in the number of new overseas student visas issued in 2024, especially those from low-income regions, notably the sub-continent of India.

This outcome generated a sharp backlash. The Labor Government responded by promising to move to a new system of allocating student visas. It would be based on quotas determined for each education provider by the Federal Department of Education. To do this required new legislation enabling such powers, which was subject to a Senate Inquiry beginning in August 2024.

The Inquiry provided a platform for educational providers and supporting interests, including the State Governments, to voice their objections to the visa reduction outcomes during 2024.

In October 2024, the Senate published its report. It supported the Government's quota legislation on the grounds that tough action was needed to reform the student visa rules.

The Labor Government has since announced that it will begin implementing the quota measures in 2025. It has declared that some 270,000 new student visas will be issued for the Higher education and Vocational college sectors and that the 'genuine student' provisions implemented by the Department of Home Affairs during 2024 will end. It has also announced the quotas allocated for each higher education provider for the year 2025.

The media reaction has been based on the assumption that this is tough action: that it will reduce the overseas student component of net overseas migration (NOM) and that, by implication, it will help deal with the demand side of the housing crisis.

This report shows that these assumptions are wrong. There will be an impact on the Vocational sector, but relatively little on the Higher education sector. Rather, in the case of the latter, the quota measures actually rescue the university providers whose visa numbers contracted as a result of the 'genuine student' test during 2024. The likely number of student visas issued in 2025 will only be fractionally down on the peak year of student visa issuance in 2023.

This report shows the likely scale of rental housing demand in Sydney and Melbourne flowing from the additional overseas students. We then compare this demand with the likely supply side for housing in Sydney and Melbourne. The latter, as multiple reports from the building and market research sectors of the property industry have stated, is likely to languish at low levels.

The result, given the likely high number of new entrants to the housing market from overseas migrants, especially students, is that the housing crisis will get worse.

For policy makers who accept this judgement, it is not enough to stop at this point. They will have to find ways to move universities from their growing funding dependence on the overseas student influx. This matters because the overseas student influx is now so large that it is contributing not only to the affordability crisis, but also to issues of urban congestion, infrastructure shortages and State government indebtedness.

Why the student component of NOM is so important

Net overseas migration has been the main source of Australia's population growth since the mid-2010s, when it reached around 250,000 a year. By this time NOM far exceeded population expansion from natural increase.

In the aftermath of the Pandemic when successive governments sought to revive immigration, NOM exploded to around 500,000 a year. In 2022-23, it reached 518,090. This is the latest year for which the ABS provides detailed estimates of the main visa contributors to both those counted as NOM arrivals (estimated to stay in Australia for at least 12 of the 16 ensuing months) and NOM departures (estimated to leave for 12 of the ensuing 16 months}.

See Table 1 NOM arrivals and departures by visa sector, 2022-23

		2022-2023 Financial Year		
		Arrivals	Departures	Net change
Visa and citizenship groups				
Permanent visas	Family	21,120	6,100	15,020
	Skilled (permanent)	35,050	5,200	29,850
	Special eligibility & humanitarian	12,710	120	12,590
	Other (permanent)	10,790	10,690	100
Total permanent visas		79,670	22,100	57,570
Temporary visas	Student - vocational education and training	36,620	4,520	32,100
	Student - higher education	183,060	7,400	175,660
	Student - other	62,890	2,930	59,960
	Skilled (temporary)	48,720	5,590	43,130
	Working holiday	69,570	3,010	66,560
	Visitors	105,770	19,110	86,660
	Other (temporary)	46,910	33,830	13,080
Total temporary visas		553,540	76,380	477,160
New Zealand citizens		41,320	17,110	24,210
Australian citizens (no visa)		59,400	94,440	-35,040
Total		737,170	219,080	518,090

Table 1 Source ABS Cat No 34070D004_202223 Overseas Migration, 2022-23

Those on temporary visas are by far the largest source of arrivals and, within this category, overseas students constitute the largest category. In part, the numbers are so high because of the very low level of student departures.

There were 282,570 student arrivals in 2022-23 yet a negligible departure number of 14,850. This gives a net figure for students of 267,720. This is over half the total net NOM of 518,090 in 2022-23.

This is an enormous figure, fully justifying the attention to overseas students in any measures to reduce the demand side of the housing crisis.

The 2022-23 figures were not an aberration. This disparity between arrivals and departures of students has been evident for years. The disparity would not occur, of course, if overseas students went home after completing their education. Eventually most do leave, but not before large numbers stay on in Australia for several years after completing their education. This is most prevalent among students from lower income countries, including the sub-continent of India, Vietnam and the Philippines and parts of South America. Many, if not most of these students, regard their investment in education here as a way to enter the Australian labour market. Most do so immediately on arrival to defray their transport, fees and living costs, and most stay on after completion of their course via the many visa options successive Australian governments have provided them with.

In doing so, they often have to switch from a student visa to some other visa, thus commentators drawing on stock counts of overseas students as an indicator of the student presence seriously underestimate their numbers. The latest estimates of temporary migrants in Australia, as of August 2024, indicated that there were 679,293 student visa holders in Australia, up from 357,919 in June 2022, just after Labor came to power. There were, in fact, far more in Australia, though on different visas. Some 223,961 were on Temporary graduate visas. As well as this, former overseas students also make up a big component of the huge numbers (323,583) on Bridging visas as of August 2024. These are persons who are seeking another visa and are allocated a Bridging visa while their claim is assessed. A recent example, though still small at this stage, is the some 13,000 on-shore temporary migrants who have been turned down for a student visa, and are now appealing the decision.³

This is why the 'genuine student' initiative was so significant. It promised to arrest the student influx, limiting it to those who were 'genuine students' and, by implication, to diminish the number staying on for years after finishing their education.

The Federal Labor Government's 'genuine student' policy

The Federal Labor Government and its State counterparts have focussed on supply side housing initiatives. However, by late 2023 the Federal Labor Government decided it had to act on the demand side as well. Multiple opinion polls indicated that most voters were opposed to the high levels of migration prevailing, and that most voters saw a direct connection between these high immigration levels and the housing crisis. This evidence, plus the Coalition's decision to run with a lower immigration policy, prompted Labor to act on the demand side for housing as well as on the supply side.

In December 2023 a new Migration Strategy was announced. This aimed 'to deliver a better managed migration system and is expected to help return migration to near pre-pandemic levels by the next financial year.'⁴ At this stage there was no indication that caps, or quotas would be used as a means to control student visa numbers.

The Strategy was not a token measure. Under the rubric of Ministerial Direction 107, the Department of Home Affairs (DHA) was to base its approval of overseas student applications on whether the applicant was a bona-fide overseas student or not. That is, whether they were genuine students planning to return after completing their courses or more interested

in accessing Australia's labour market and perhaps becoming permanent residents? The new rules were particularly fierce on the Vocational and English Language Intensive Courses for Overseas Students (ELICOS) colleges, which offer much cheaper and less onerous entry rules than do universities.

Other measures to deter non bona-fide students included higher application fees for student visas and restrictions on the ease with which students could switch to another visa (visa hopping). In early 2024 the English language test score for student visas was raised.

These new measures hit hard. The number of student visas issued in the first half of 2024 was much lower than in the same months of 2023. According to DHA reports, the total number of primary student visas issued (that is, those not including partner visas) in the year to May 2024 to the Vocational and ELICOS colleges halved, compared with the previous year to May 2023.⁵ The number of primary visas issued for higher education institutions over the same periods, fell from 261,317 to 201,907. This latter downturn mainly impacted applicants from sub-continent of India countries. The number of student visas issued to Indian students applying from outside Australia fell over the year to 2023-24 relative to 2022-23 from 44,165 to 14,342. On the other hand, the number of visas issued to Chinese students increased from 67,519 to 69,628.⁶

The universities were shocked, especially the second tier and regional universities whose fees are just over half of those charged by the more prestigious Group of Eight universities (Go8). These second-tier universities rely heavily on recruiting from the sub-continent of India. Ministerial Direction 107 was based on the (correct) assumption that the risk of staying on was much higher for sub-continent applicants than from those from China, who mostly attend Go8 universities. Chinese students mostly return home soon after completing their courses.

The backlash

The Universities and associated interests fought back. They asserted that Ministerial Direction 107 had devastated enrolments during 2024 and that this would have massive impacts on their finances, their capacity to provide jobs for current and future staff, as well as impacting the wider State economies.

By August 2024, the Senate had begun an Inquiry into the Labor Government's proposed legislation to manage the overseas student industry. This, which passed the Lower House in May 2024, contained provisions allowing the Government to cap the issuance of student visas should it wish to do so. The caps were referred to as quotas in the subsequent debate on the legislation. The universities and most media commentators assumed that these quotas were an addition to the Government's tools to restrict student visa numbers.

On September 24 the *Australian Financial Review* published a report indicating that 'that many universities and colleges have already been devastated by the ministerial direction introduced last December'. The article stated that the number of commencing students at Federation University fell from 2306 in 2023 to 442 this year, at La Trobe from 4095 to 2795

and at Wollongong from 4042 to 2663. The article went on to quote from a letter sent by Universities Australia (UA) to Federal, State and Territory Treasurers. It claimed that the impact of Ministerial Direction 107 had been to wipe out some \$4 billion in university revenue. Various Treasurers have since responded in support of UA's claims, including those in Victoria, NSW and South Australia.⁷

Elsewhere, UA's Chair, Professor David Lloyd, told the National Press Club in September 2024 that, as a result of Ministerial Direction 107, UA members are seeing 'a 23 percent reduction' in overseas student starts.⁸

The Victorian Government Treasurer, Tim Pallas, was widely quoted as stating that the reduction in student visas was putting the State's economic future in peril. He said that education is the state's largest export earner and supported 63,000 jobs. He cited 'independent analysis' prepared by SPP Consulting that, by 2027, the caps on student visas could cost Victoria 12,000 jobs, risking the state's ability to tackle local skills shortages. Pallas concluded that 'the Commonwealth government needs to go back to the drawing board and better consult with the state and the sector before it's too late'.⁹

On September 16, 2024, the Victorian Government issued a defiant rejection of the Federal Labor Government's overseas student policy. The declaration, attributed to the Premier, Jacinta Allan, was that 'Victoria Says No to Caps Yes to International Students'.¹⁰ This is the Premier of a State Labor Government openly defying a signature policy of its Federal Labor Government counterpart.

This response is understandable given the scale of dependence of universities in Victoria and elsewhere on the overseas student industry. The 'independent research' Pallas referred to was commissioned by the Victorian Universities. It only refers to the benefits of importing overseas students, but is nevertheless a useful source of up-to-date information. For Victoria's public universities in 2023, 38 per cent of those enrolled were overseas students and they generated 43 per cent of the total revenue from student fees. Victoria's universities source nearly half of their expenditure on research from this overseas student fee revenue.¹¹

In addition, the hospitality industries rely on overseas student labour and the property and building industries on immigration induced market growth. The Victorian State Government has based its business plan on a population-led 'Big build'. Though swimming in red ink, it needs further population and infrastructure investment to keep the show going. A similar, though less extreme, situation exists in NSW.

The Labor Government responds

As indicated above, the assumption throughout the controversy described above was that the new quota legislation would replace the hated Ministerial Direction 107 and that it would be directed towards the same goal, that is, reducing the overseas student intake. The Senate Committee, when its report was published in October 2024, expressed this view. It supported the passage of the legislation on the grounds that 'strong controls over student visa issuance were justified.' The Coalition Senators on the Senate Committee, in their

minority report, also supported the quota legislation, quite explicitly on the grounds that by reducing the intake it would help deal with the housing crisis.

If the legislation is passed it will indeed give Labor more options to control the overseas student intake. However, the assumption that it is intended for this purpose is false.

The Labor Government changes course

When the Labor Government announced its December 2023 intention to control and contract the student influx it held the results of two Labor initiated inquiries. One was *The Rapid Review into the exploitation of Australia's Visa System* and the other was the *Review of the Migration System Final Report 2023*. Both were released in March 2023. Both concluded that the system lacked integrity. It allowed far too much scope for providers to game the system in favour of students whose motive was to work rather than study in Australia.

These reports, along with the electoral unease about the scale of NOM, mentioned earlier, contributed to the December 2023 policy announcements, including the enforcement of Ministerial Direction 107 by DHA.

Meanwhile, the Department of Education, whose responsibility it was to regulate the overseas student industry, set about planning how to turn the concerns about integrity into legislative change. In March 2024 the DoE released a detailed examination of the integrity problems and its legislative proposals to deal with them.¹² The Department proposed a strong suite of reforms designed to 'combat misuse of the student visa system'.¹³

There were no references in this report to the need for any legislative change to give the DoE power to manage student numbers by use of quotas or any other related measures. However, by May 2024, when the Labor Government introduced the new legislation it had changed its tune.

Jason Clare, the Minister for Education, delivered his Second Reading speech on the new ESOS legislation on May 16, 2024. The main focus was still on integrity measures. However, he also announced new, hitherto unmentioned provisions, giving the DoE power to manage overseas student enrolment levels, even down to particular courses.

What was this about? It was not to do with integrity or limiting the scale of student intake. Instead, Clare announced that the overarching goal was to empower the 'Minister of Education to manage sector enrolments to deliver sustainable growth'.¹⁴

In May 2024 the DoE released a consultation paper entitled, *Australia's International Education and skills strategic Framework*.

This gives an illuminating indication of what the proposed legislation was about. The overarching goal was the same as articulated by Clare. It was to manage the system to achieve 'sustainable growth over time.'¹⁵ Other goals mentioned that might influence these quotas included the relevance of courses to Australia's skill needs, and whether there was a lot of purpose-built student accommodation available.¹⁶

Management in the cause of curtailing the student influx is conspicuous by its absence. Instead, DoE hints at a quite new agenda. Part of this is catering for sector concerns about the impact of Ministerial Direction 107. The DoE states that there is a need to provide support to regional universities' whose international student profiles will become an element of 'mission-base compacts agreed between universities and the Australian Government.'¹⁷

Clare and his Department had opened the door to a new era of Government control over the overseas student industry. Why? One inference is that it reflected Labor Government concerns about the backlash against the implementation of Ministerial Direction 107.

The subsequent actions of the Minister and his Department leave little doubt that this was indeed the motive.

The new powers are intended to rescue, not cut the universities' intake of overseas students

The Minister for Education, Jason Clare, has made this abundantly clear. After months of consultation with the industry, in August 2024 the Minister announced the broad intent of the Government's plans for the overseas student industry. It was to implement the new quota powers in order to achieve an overall number of 270,000 new primary visas in 2025 for the university and vocational sectors. This number will be shared by the Vocational college sector (some 94,500) and the rest by the university sector.

In the case of the university sector each provider will be issued with a specified quota, or cap. The planning level does cut the Vocational sector hard, on the grounds that the Government wants to encourage the colleges to enrol more domestic students.¹⁸ However, the Plan exempts some sectors of the overseas student industry, including the ELICOS colleges (which, as noted earlier, experienced a drastic reduction in new visas issued in the first half of 2024).

Minister Clare, summarized the rationale for the Plan at a press conference on August 27, 2024. It was that:¹⁹

Ministerial Direction 107 is having an impact on the number of international students coming to Australia right now. In effect, it's acting as a de facto limit-setter. But it's a pretty blunt instrument. It's meant that a few universities have got a lot more international students this year than they did last year. And a lot of universities have got a lot less. It's why a number of universities over the last few months have come to me and asked me to put in place a different system, a better system, a fairer system. And that's what the bill before the Parliament at the moment does.²⁰

Clare went on to nominate some of universities that will benefit, including the Universities of Wollongong and La Trobe, which he cited as big losers in 2024. He also declared that 'for universities, their numbers next year will be roughly the same as they were last year'. The significance of this statement is that 2023 was a record year for new overseas student enrolments in the higher education sector. According to the Department of Higher Education

there were 207,356 new intrants to the sector in the year to December 2023, compared with 177,187 in the previous peak year of 2019 (before the Pandemic).²¹

This assurance has been reaffirmed by Mr Ben Rimmer, the Department of Education's Deputy Secretary for Higher Education, Research and International. He is reported in the Senate Final Report as saying that: 'most public universities will have close to the same number of international students commencing in 2025 as they did in 2023'.²²

The Department of Education has been as good as its word with its announcement of each University's quota for 2025. The size of the quotas were published in the Senate Final Report.²³ Most universities received a quota close to the number of commencements that occurred in 2023. For the most part, the second tier and regional universities have been restored to around their 2023 levels. A few of the Go8 beneficiaries from the surge in Chinese enrolments in 2024 have been cut. The University of Sydney's quota has been set at 11,900 compared with its actual new overseas student enrolment in 2023 of 12,790.

These allocations confirm that the original December 2023 policy of enforcing a restriction on overseas student visas is a dead letter. The sharp contractions in early 2024 will be reversed. This depends, of course, if the legislation is affirmed in the Senate. As of late November 2024, this now appears doubtful.

The result (should the quotas be enforced) will be that the overall size of the overseas student intake in 2025, including the higher education and other sectors, it is likely to be close to the record year of 2023. The Vocational college intake will fall, but this fall will likely be compensated by a rise in the ELICOS intake. ELICOS is a massive generator of student visas. It accounted for 112,781 new enrolments in Australia in 2023. Yet it has been exempted from the National Plan. The numbers visaed are certain to grow as ELICOS colleges work to restore their enrolment levels (relative to the sharp fall that occurred in early 2024). They will be in a good position to do so, as students denied access to the Vocational sector will likely look to the ELICOS colleges for an alternative.

NOM additions attributable to overseas students, after falling a bit in 2024 (while the 'genuine student' rule prevailed), will probably rise in 2025.

The Labor Government has capitulated to university and associated interests. If the quota legislation passes, there will be profound institutional changes in the management of the overseas student influx.

The responsibility for administering student visaing will be switched from the Department of Home Affairs, which has expertise and some interest in curbing the exploitation of student visa options. It will move to the Department of Education, which has no such expertise and a strong motive to sustain the overseas student industry. This is because the expansion of the industry has long been one of the Department's main missions.

The Labor Government intends to turn the process of student visa issuance into a political football. There is a good case for the proposed new quota power. This is because it facilitates

Government management (and reduction) of the student intake should it decide to use the power for this purpose. However, this is not the end the Labor Government is proposing to use it for in 2025. Rather, it is to rescue the universities dependent on those students who do not meet the 'genuine student' test.

Why is Labor trying to do this? We can only speculate. There are politics involved with the next federal election approaching. Some of the regions and electorates affected by the 2024 cuts are located within vulnerable Labor seats In Victoria, which is a Labor stronghold. It may be that the Federal Labor Government has responded to the Victorian Government's pressure to shore up what this state Government regards as one of its major industries. It will not surprise that most of the Victorian Universities have receiving favourable quotas for 2025 (aside from the University of Melbourne and (surprisingly) Federation University.

Behind Labor's capitulation there lies an unwillingness of successive governments to find an alternative means of financing Australia's universities. This issue has to be confronted if there is to be any sustained contraction in the overseas student influx. We return to this matter in the final section of this report.

But before doing so we need to put some numbers on the demand side implications of the overseas student influx.

The student influx and the demand side of the housing crisis

There is no consensus on the contribution of the overseas student influx to the housing crisis. The universities and their supporters (including some State governments) claimed during the Senate hearings on the new quota powers that overseas students constitute a negligible share of the nation's rental occupants.

This claim prompted a critical response from the Albanese Government's Department of Education. It issued a Factsheet asserting that overseas students are a significant component of housing demand, especially for rental accommodation.²⁴

The Factsheet showed that the lead advocates putting the contrary position were relying on rental occupation numbers drawn from the August 2021 Census. At this time, the overseas student presence was at a low point because so many had returned home during the Covid emergency. Since that time, the Factsheet noted, the number of overseas students in Australia had increased from 363,900 to 696,162 as of July 2024.

The Factsheet also noted that the DOE's research indicated that about half of overseas students occupy private rental accommodation. It concluded that, since the National Planning level has been set at 270,000 for 2025, 'conservatively 135,000 new international students will enter the private rental market next year.'²⁵ The implication was that this was a high number, justifying the Government's new quota powers.

But is it a high number? It depends on where the overseas students locate, on the share who are renters and their household size (that is, how many students live in each household). Also, on whether the 270,000 benchmark is a realistic starting point for estimating the overseas student housing impact.

It is not. What matters is the net expansion in student numbers from NOM. The 270,000 figure is for new visas issued and does not take account of departures. On the arrival side, it does not include accompanying family members or the ELICOS influx.

The Australian Treasury's most recent NOM estimates for students project a net figure in 2024-25 of just 130,000, composed of 195,000 arrivals and 70,000 departures.²⁶ This is way below the actual NOM for overseas students in 2022-23 of 272,720.

The 130,000 projection is assuming that the Labor Government will succeed in both reducing the number of student visas issued and in restricting opportunities for students to stay on in Australia – thus many more departures. Treasury's assumptions have been forensically dissected by former senior Department of Immigration official, Abul Rizvi. He argues that NOM from students in 2024-25 is likely to 'be well over 200,000, rather than the forecast 130,000'.²⁷

We think Rizvi's revisions are plausible. If anything, they underestimate the likely student contribution to NOM. Moreover, the Treasury 130,000 projection assumes that the Labor Government will succeed in both reducing the number of student visas issued and in restricting opportunities for students to stay on in Australia.

The Treasury is as deluded on the real motive for Labor's quota legislation as most other commentators.

In assessing the rental implications of the likely NOM from overseas students we have assumed that it will be around 200,000 in 2025. It is a conservative figure, well below the actual 2022-23 level of 272,720.

This number is just the starting point for the analysis. As noted, much depends on where students locate, whether they choose private rental accommodation and their household size. Fortunately, we don't have to make a stab in the dark on these metrics.

The ABS has recently published data that enables estimates of the locations and housing choices (among other metrics) of overseas student visa holders. This has been drawn from the 2021 Census and from other ABS data bases where further information on these visa holders is held. This is provided in the ABS dataset *Temporary Migrants and the Australian Census 2021*.²⁸

From this we were able to project the location and housing situation of overseas students at various levels of NOM. The analysis depends on the assumption that the actual housing

propensities (including city location) of overseas students at the time of the 2021 census will be repeated for projected influx.

The projected rental housing impact of overseas students for Sydney and Melbourne

As indicated, the ABS has provided data on temporary visa holders by visa class, the type of tenure and the type of dwelling each temporary resident was living in as of 2021 as well as the number of people usually resident in the dwelling. Tables with this level of detail for both Sydney and Melbourne are provided in an Appendix to this report. In each case, Sydney refers to Greater Sydney and Melbourne to Greater Melbourne.

The data in the appendix allowed a calculation of the number of usual residents by dwelling structure and tenure. From these data, we were able to develop a baseline measure for both Melbourne and Sydney of the number of rental dwellings occupied by dwelling type, by temporary residents in 2021. This is shown in Table 2.

Table 2 Count of rental dwellings occupied by temporary migrants to Australia in Sydney and Melbourne as of 2021, by dwelling type

Visa class Dwelling structure	Sydney				Melbourne			
	Temp- orary Student	Temp- orary Bridging	NZ Citizen (subclas s 444)	All other Temp- orary	Temp- orary Student	Temp- orary Bridging	NZ Citizen (subclass 444)	All other Tempor ary
Flat or apartment in a nine or more storey block	11,708	5,977	2,576	7,452	10,369	4,150	2,408	5,156
Flat or apartment in a four to eight storey block	9,618	6,531	3,746	7,258	3,512	1,815	1,779	2,301
Flat or apartment in a three storey block	6,408	4,915	3,137	5,028	2,124	1,355	1,391	1,445
Flat or apartment in a one or two storey block	3,434	2,987	2,062	2,239	2,769	2,364	1,930	1,881
Semi-detached, row or terrace house, townhouse etc. with two or more storeys	1,659	1,752	2,382	1,537	2,861	2,507	2,151	2,139
Semi-detached, row or terrace house, townhouse etc. with one storey	502	620	1,049	483	2,067	2,462	2,451	1,651
Separate house	4,081	5,711	10,952	3,485	8,362	10,273	13,842	5,967
Total occupied dwellings	37,410	28,494	25,903	27,483	32,063	24,926	25,951	20,540

Source: ABS Table Builder Temporary Migrants and Australian Census 2021

We then calculated the number of rental dwellings needed per 1000 NOM of temporary overseas students and other temporary visa holders who were living in Sydney and Melbourne as of 2021. These rates are shown in Table 3.

Table 3 Consumption of rental housing per 1000 NOM by temporary visa class in 2021 in Greater Sydney and Greater Melbourne							
Temporary Student	Temporary Bridging	NZ Citizen (subclass 444)	All other Temporary	Temporary Student	Temporary Bridging	NZ Citizen (subclass 444)	All other Temporary
325	283	235	368	333	267	210	351
Source: derived from ABS TableBuilder dataset Temporary Migrants and Australian Census 2021							

Assuming that these rates hold for every additional 1000 NOM arriving on a temporary student visa that locates in Sydney, they will occupy 325 rental dwellings, and for every additional 1000 NOM on temporary student visas that settles in Melbourne they will occupy 333 rental dwellings.

In the current paper we are focused on the impact of overseas students on the rental market. It should be noted that some students occupy homes that are owned outright, homes being purchased, or live rent free.

Returning to these rental rates, we can apply them to whatever level of NOM thought likely to derive from overseas students over the selected projected period for Sydney and Melbourne.

To do this we first have to establish the share of NOM from overseas students that is likely to settle in Sydney and Melbourne.

This share is based on the actual recent propensity of overseas students to settle in these two cities. It was derived from data provided by the ABS which indicated the share of NOM from overseas students settling in NSW and Victoria.

This is shown in Table 4, which shows the arrivals and departures and net change in overseas students for 2021-22 and 2022-23 for Victoria and NSW.

Table 4 Arrivals and departures of overseas students on temporary visas for 2021-22 and 2022-23 for all Aust and VIC and NSW			
	ALL AUST 2022-23	NSW 2022-23	VIC 2022-23
Arrive	282,570	100,050	82,270
Depart	14,850	5,630	4,350
NET	267,720	94,420	77,920
Share of NET		35%	29%

Source: ABS, Overseas Migration, 2022-23 financial year, Data Downloads

Not all these overseas students will reside in Sydney and Melbourne. To establish this we drew on ABS figures on the location of people on temporary student visas at the time of the 2021 Census living in the respective capital city or the rest of the state location. This showed that for overseas students who were renting accommodation in 2021, 92.5% in NSW were living in Sydney and 94.9% in Victoria were living in Melbourne.

Assuming that these propensities to locate in Sydney and Melbourne continue we were able to project the rental demand deriving from overseas students for varying levels of student NOM. This was done by applying the rate of rental occupation calculated above to the numbers, projected for Sydney and Melbourne. The result is shown below in Table 5.

STUDENT NOM SCENARIO (AUST)	125,000	150,000	175,000	200,000	225,000
NET SYDNEY (PERSONS)	40,614	48,736	56,859	64,982	73,105
NET SYDNEY OCC DW (RENTAL)	13,199	15,839	18,479	21,119	23,759
NET MELBOURNE (PERSONS)	34,447	41,336	48,226	55,115	62,005
NET MELBOURNE OCC DW (RENTAL)	11,471	13,765	16,059	18,353	20,648

Source: Modelled from ABS Table Builder data 2021 Census and Temporary Migrants

Demand and supply of rental accommodation for overseas students in Sydney and Melbourne

Given the increasing shortage and price of rental accommodation in Sydney and Melbourne we cannot assume all the projected influx of overseas students will actually find rental accommodation at the rate that they did in 2021.

Overseas students will be competing for the available rental stock with residents leaving home or starting a partnership or otherwise seeking independent living. The competition will make them all more miserable as they battle to find rental accommodation and to pay the price. The effects of this competition will cascade through society – increasing homelessness, reducing options for marginalised and low income households and worsening quality of life in our major cities.

But how miserable? Most commentators have had little to say about the demand side of the equation. They simply don't know or don't want to know. They concentrate on the supply side.

We now have a plausible estimate of the demand side for overseas students. For our projection of a total overseas student NOM for 2025 of 200,000, Table 5 shows that this will add additional rental demand of some 21,119 dwellings in Sydney and 18,353 in Melbourne. Their likely distribution (assuming it is the same as for 2021) will be dispersed across both Sydney and Melbourne. This is shown in the maps included in the Appendix.

Are these numbers a problem? They certainly are, given the existing scarcity and the very low annual addition to the rental stock in Sydney and Melbourne. As to the latter, we have assumed that the number of new approvals of medium and high density dwellings (defined by the ABS as non-houses) is the best available indicator of supply. This supply, from October to September for the last three years to September 2024 is shown in Table 6 for both Sydney and Melbourne.

Table 6: Annual approvals for dwellings excluding houses for Sydney and Melbourne from October 2021 to September 2024		
Annual approvals for dwellings excluding houses	Sydney	Melbourne
OCT 21 - SEP 22	20,982	23,808
OCT 22 - SEP 23	18,953	19,843
OCT 23 - SEP 24	13,792	16,732

Source: ABS Cat No: 8731.0 Building Approvals, Australia, Sep 2024

As Table 6 shows, these approvals have fallen sharply in recent years. For the year to September 2024 they were just 13,792 in Sydney and 16,732 in Melbourne. For Sydney this figure was way below out estimate for the rental demand for NOM from overseas students in 2025 (for Australia of 200,000).

It is that an additional 21,119 rental dwellings will be required to accommodate them in Sydney. For Melbourne the start level required was 18,353. This too is lower than the actual approval level for Melbourne of 16,732, though the gulf is not as great as in Sydney.

Despite all the noise and promises of increasing supply, it is not happening at anywhere near the level needed to solve the housing crisis. We are going backwards, when both demand and supply is taken account of, at least as regards the situation in Sydney and Melbourne.

As we and many others have argued, the supply situation is not likely to improve rapidly. This because building costs, including labour, materials, site and finance costs have all increased sharply. The result is that developers cannot build much affordable rental accommodation. Instead, they focus on higher end dwellings where a price premium can be charged that affluent purchasers can afford.

This is why serious attention to the demand side of the issue is so important and urgent. It is the only feasible option that will, in the near term, take much of heat out of the rental market.

The Labor Government did for a time take relevant action. It has since reversed course.

Should the Federal Opposition or any other advocacy group take up the cause, there should be accompanying action to reform the overseas student industry, starting with the universities.

Reforming the university system

Whoever wins the 2025 Federal Election will have to diminish the demand side for housing if there is to be immediate progress in solving the housing crisis. The most feasible option is a reduction in the overseas student influx.

It is going to take some policy steel to achieve this demand reduction. The universities dependence on revenue from overseas students has become so high that any attempt to reduce it is met with howls of pain that have real political bite. Part of the dilemma is that it generates demands for compensating revenue. Governments, for their part, are reluctant to produce the funds. We have a stalemate.

This stalemate is only likely to be overcome if a contraction in the overseas student industry is combined with the electoral appeal of requiring universities to stop prioritizing the teaching of overseas students at the expense of domestic students. Universities need a new rationale. It should be to provide domestic students with the skills needed to advance their career interests and those of the national economy.

Yet, as things stand, the prioritization of overseas students is blatant. It is laid bare in the commencement data. In 2019 there were 384,291 commencements of Australian citizens across the entire higher education sector. By 2023 this number had declined to 371,854.

In some fields where there should have been a big increase in local training, like IT, by 2023, there were far more completions for overseas students than domestic students. There were 14,508 for overseas student completions in IT but only 9815 for domestic student completions.²⁹

Policies to reverse this situation need not imply a radical decline on overseas student enrolments. The net NOM impact can be reduced just as well by ensuring that students depart Australia promptly when they complete their education as by reducing their initial intake. If this happened it would leave a strong continuing stream of overseas students and their fee revenue. Such a policy will require a contraction of the pathways for students to stay on in Australia.

Such reforms would give a potent incentive for universities to provide courses which really are valuable to students when they return home.

There will be pain and the need for some government assistance towards this transition.

There is another reason why such measures will have to be contemplated. This is that both the Coalition and Labor have signalled their intention to contract the permanent entry program. This will mean fewer opportunities for students intent on staying on in Australia to gain a permanent entry visa. We already have a problem of permanent temporaries, largely composed of former students who are resorting to any action that will sustain their stay here, including bogus claims for asylum and administrative appeals against visa rejections. This underclass is a blight on our society.

Appendix

Table 1 below shows the distribution of temporary visa holders living in Greater Sydney in 2021 by visa class, tenure, dwelling structure and number of usual residents in the household.

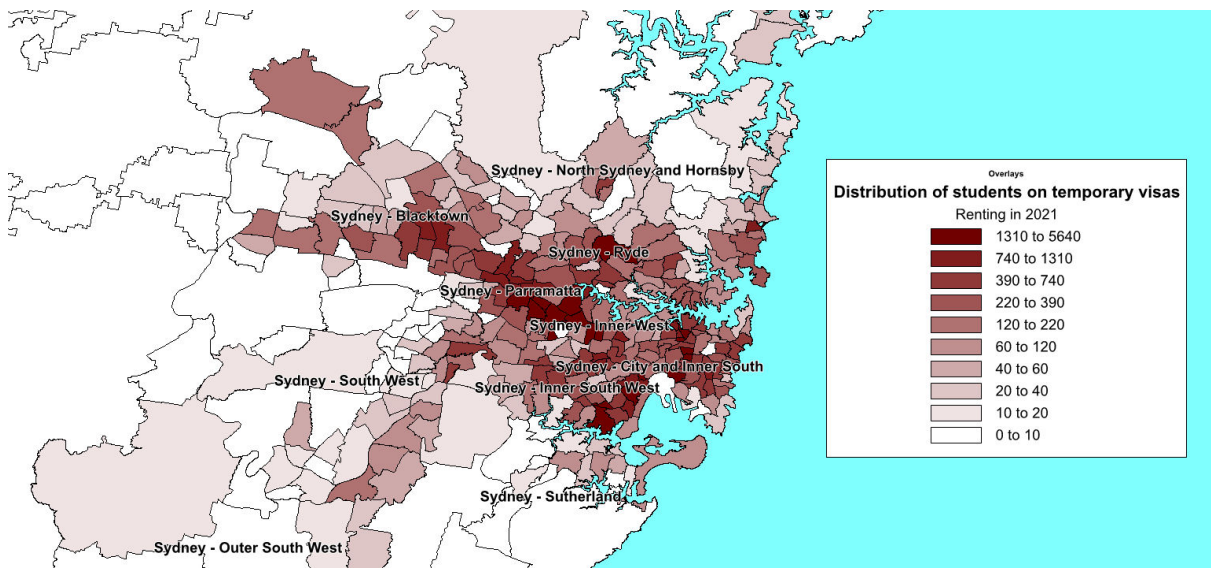
Dwell patterns of temporary residents on student visas living in Greater Sydney in 2021

APPENDIX Table 1: GREATER SYDNEY TEMPORARY MIGRANT DWELL PATTERNS 2021								
	VISAP Visa Subclass	Temporary Bridging	Temporary Student	Temporary Skilled	Temporary Working Holiday Maker	Temporary Other	NZ Citizen (subclass 444)	Total
Number of persons usual	STRD Dwelling structure							
Rented								
One person	Flat or apartment in a nine or more storey block	1,153	2,620	1,066	67	762	1,101	6,764
	Flat or apartment in a four to eight storey block	1,117	1,820	819	51	627	1,530	5,975
	Flat or apartment in a three storey block	799	1,033	542	55	378	1,371	4,193
	Flat or apartment in a one or two storey block	543	592	212	21	201	1,031	2,596
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	188	265	95	15	108	602	1,267
	Semi-detached, row or terrace house, townhouse etc. with one storey	72	83	28	-	27	295	513
	Separate house	672	537	105	20	258	1,459	3,049
Two persons	Flat or apartment in a nine or more storey block	5,019	9,328	3,681	558	2,626	2,120	23,332
	Flat or apartment in a four to eight storey block	5,453	7,647	3,620	578	2,572	2,996	22,861
	Flat or apartment in a three storey block	3,973	5,160	2,668	500	1,598	2,303	16,207
	Flat or apartment in a one or two storey block	2,087	2,701	837	192	824	1,236	7,874
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	808	694	550	66	298	1,202	3,620
	Semi-detached, row or terrace house, townhouse etc. with one storey	406	312	222	12	115	720	1,798
	Separate house	2,347	1,993	713	64	818	4,211	10,144
Three persons	Flat or apartment in a nine or more storey block	3,216	6,011	2,114	284	1,403	790	13,820
	Flat or apartment in a four to eight storey block	4,024	5,866	2,211	287	1,761	1,365	15,518
	Flat or apartment in a three storey block	3,361	4,733	1,311	288	1,481	1,115	12,292
	Flat or apartment in a one or two storey block	2,254	2,696	545	102	831	677	7,119
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	1,172	1,043	532	85	344	1,241	4,415
	Semi-detached, row or terrace house, townhouse etc. with one storey	380	388	167	41	150	456	1,586
	Separate house	3,211	2,330	895	78	993	5,172	12,663
Four persons	Flat or apartment in a nine or more storey block	2,956	5,563	1,355	186	1,000	533	11,594
	Flat or apartment in a four to eight storey block	3,552	5,086	1,428	122	1,318	788	12,287
	Flat or apartment in a three storey block	2,684	3,397	903	132	925	673	8,721
	Flat or apartment in a one or two storey block	1,697	1,700	429	58	576	473	4,945
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	1,462	1,358	756	94	526	1,319	5,519
	Semi-detached, row or terrace house, townhouse etc. with one storey	418	273	210	50	88	489	1,517
	Separate house	4,250	2,689	2,045	68	1,363	7,139	17,556
Five + persons	Flat or apartment in a nine or more storey block	2,519	5,151	409	95	603	92	8,864
	Flat or apartment in a four to eight storey block	2,291	3,741	312	17	866	331	7,553
	Flat or apartment in a three storey block	1,694	1,841	274	35	464	371	4,663
	Flat or apartment in a one or two storey block	1,124	838	132	23	442	349	2,909
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	2,022	1,800	338	68	581	2,177	6,980
	Semi-detached, row or terrace house, townhouse etc. with one storey	572	327	83	31	125	599	1,734
	Separate house	8,664	5,492	1,424	166	2,313	19,392	37,461
Other tenure types (Summarised)								
	Owned outright	5,043	4,704	454	115	1,357	11,682	23,444
	Owned with a mortgage	14,142	9,523	1,037	310	3,080	28,851	56,983
	Purchased under a shared equity scheme	117	145	5	-	12	42	378
	Occupied rent free	884	884	142	4	294	420	2,722
	Occupied under a life tenure scheme	77	100	5	6	11	198	498
	Other	223	215	-	-	32	91	700
	Not stated	2,169	2,386	258	51	671	1,449	7,137
	TOTAL	100,813	115,064	34,933	4,994	34,822	110,445	401,769

Dwell patterns of temporary residents on student visas living in Greater Melbourne in 2021

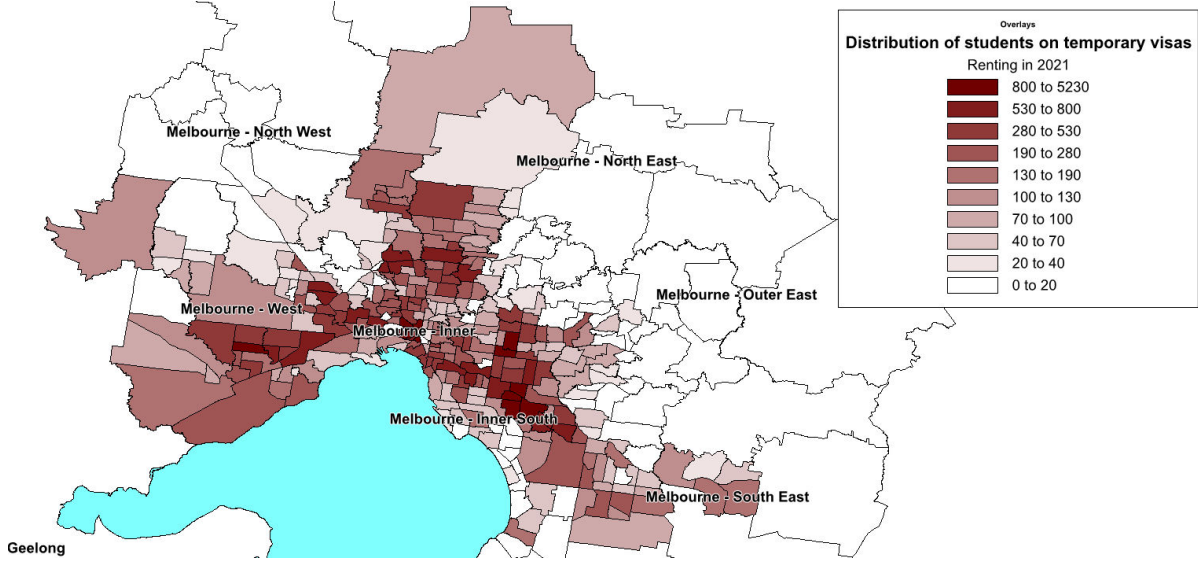
APPENDIX Table 2: GREATER MELBOURNE TEMPORARY MIGRANT DWELL PATTERNS 2021								
	VISAP Visa Subclass	Temporary Bridging	Temporary Student	Temporary Skilled	Temporary Working Holiday Maker	Temporary Other	NZ Citizen (subclass 444)	Total
Number of persons usually resident in dwelling	STRD Dwelling structure							
Rented								
One person	Flat or apartment in a nine or more storey block	1,437	4,101	747	87	1,024	1,354	8,764
	Flat or apartment in a four to eight storey block	593	1,383	347	28	472	915	3,738
	Flat or apartment in a three storey block	383	663	164	21	260	774	2,257
	Flat or apartment in a one or two storey block	478	556	142	11	300	1,059	2,540
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	263	327	79	6	167	447	1,291
	Semi-detached, row or terrace house, townhouse etc. with one storey	273	249	72	10	149	758	1,526
	Separate house	907	811	148	16	381	1,787	4,051
Two persons	Flat or apartment in a nine or more storey block	3,962	9,546	2,145	486	2,396	1,760	20,296
	Flat or apartment in a four to eight storey block	1,818	3,305	951	167	1,128	1,445	8,836
	Flat or apartment in a three storey block	1,300	2,045	519	171	713	1,010	5,752
	Flat or apartment in a one or two storey block	1,858	2,401	530	80	1,010	1,206	7,091
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	1,713	1,649	631	69	789	1,655	6,507
	Semi-detached, row or terrace house, townhouse etc. with one storey	1,799	1,553	516	48	779	1,856	6,567
	Separate house	4,298	3,495	1,068	88	1,713	6,148	16,805
Three persons	Flat or apartment in a nine or more storey block	1,567	3,199	985	128	693	354	6,927
	Flat or apartment in a four to eight storey block	677	997	347	68	329	324	2,751
	Flat or apartment in a three storey block	649	894	249	60	322	240	2,418
	Flat or apartment in a one or two storey block	1,659	1,652	430	52	620	485	4,897
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	1,842	2,224	661	81	911	1,294	7,021
	Semi-detached, row or terrace house, townhouse etc. with one storey	1,810	1,561	465	37	666	1,154	5,700
	Separate house	7,229	5,719	1,451	96	2,637	7,022	24,145
Four persons	Flat or apartment in a nine or more storey block	683	1,308	373	42	222	171	2,799
	Flat or apartment in a four to eight storey block	277	460	150	13	129	131	1,158
	Flat or apartment in a three storey block	315	407	116	9	165	117	1,125
	Flat or apartment in a one or two storey block	1,141	1,350	322	15	414	275	3,527
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	1,750	2,105	719	70	765	1,042	6,439
	Semi-detached, row or terrace house, townhouse etc. with one storey	1,752	1,261	444	54	514	871	4,896
	Separate house	8,752	7,236	2,332	118	3,292	9,302	31,032
Five + persons	Flat or apartment in a nine or more storey block	189	508	60	7	53	65	879
	Flat or apartment in a four to eight storey block	93	145	27	5	13	5	299
	Flat or apartment in a three storey block	135	196	29	-	53	13	433
	Flat or apartment in a one or two storey block	595	623	101	7	207	186	1,710
	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	1,682	2,206	330	44	637	924	5,816
	Semi-detached, row or terrace house, townhouse etc. with one storey	1,243	1,029	139	16	368	815	3,601
	Separate house	13,100	10,441	1,573	157	4,060	21,571	50,910
Other tenure types (Summarised)								
	Owned outright	6,106	5,470	378	68	1,514	11,096	24,639
	Owned with a mortgage	15,938	10,096	917	181	3,837	41,501	72,475
	Purchased under a shared equity scheme	88	64	-	-	-	28	271
	Occupied rent free	940	1,027	107	-	331	466	2,909
	Occupied under a life tenure scheme	90	66	-	-	23	194	430
	Other	196	126	7	-	37	127	591
	Not stated	1,928	1,963	175	48	789	1,723	6,721
	TOTAL	93,505	96,414	20,945	2,664	34,883	123,669	372,537

Map 1: Distribution of temporary migrants (on student visas) renting accommodation in Greater Sydney in 2021



Map 1 Source: ABS dataset on Temporary Migrants and 2021 Census. Mapping from Tactician Corporation

Map 2: Distribution of temporary migrants (on student visas) renting accommodation in Greater Melbourne in 2021



Map 2 Source: ABS dataset on Temporary Migrants and 2021 Census. Mapping from Tactician Corporation

Notes

- ¹ David McCloskey and Bob Birrell, *The Housing Crisis in Melbourne and Sydney – New Strategies to fix it*, Australian Population Research Centre, Research Report, August 2024
- ² <https://www.realestatebusiness.com.au/property-management/28827-slight-increase-in-sydney-vacancies-don-t-mask-dire-rental-market>
- ³ Department of Home Affairs, Temporary entrants visa holders pivot table as at 331 August 2024
- ⁴ Australian Government, Migration Strategy, Dec 2023, p. 15
- ⁵ Data.Gov.au. The data set on student visas in this collection is more recent than that provided in the Department of Home Affairs via its official reports on the student program.
- ⁶ Ibid.
- ⁷ Julie Hare, '\$4b economic pain from student cuts, much more to come' *AFR* Sept 24, 2024
- ⁸ Q&A – National press club of Australia -UA chair Professor David Lloyd, Sept 11, 2024
- ⁹ Noel Towell, et al, 'Foreign student cap will 'devastate' Victorian economy: Pallas, *The Age*, August 27 2024
- ¹⁰ Jacinta Allan, Media Release, 'Victoria says no to caps, Yes to international students'. 16 sept 2024
- ¹¹ SPP Consulting, Economic Impact of Victorian Public Universities, unpublished, June 2024
- ¹² Department of Education, Improving Integrity in the International Education Sector, March 2024
- ¹³ Ibid., p. vi
- ¹⁴ Jason Clare, Second Reading speech on the Education Services for Overseas Students Amendment (Quality and Integrity) Bill 2024, Hansard, House of Representatives, May 5, 2024, p. 6
- ¹⁵ Department of Education, *Australia's International Education and Skills Strategic Framework*, May 2024, p. 15
- ¹⁶ Ibid
- ¹⁷ Ibid, p. 16
- ¹⁸ Department of Employment and Workplace Relations, National Planning Level, August 2024, p. 1
- ¹⁹ Jason Clare, Press Conference – Sydney – Tuesday 27 August 2024
- ²⁰ Ibid., p. 1
- ²¹ Department of Education, International Students, Monthly summary, 2024
- ²² The Senate, Education and Employment Committee, Education Services for Overseas Students Amendment (Quality and Integrity) Bill, 2024, p. 51
- ²³ Ibid., p. 51
- ²⁴ Dept of Education. 'International students and the private rental market – available data', September 12, 2024, p. 2
- ²⁵ Ibid., p. 2
- ²⁶ Abul Rizvi, 'Treasury's net migration data playing into Dutton's narrative', *Independent Australia*, 21 October 2024, p. 5
- ²⁷ Ibid.
- ²⁸ ABS, Temporary visa holders in Australia, 2021, April 2023
- ²⁹ Documentation of this argument is provided in Bob Birrell and Ernest Healy, 'The Skills Crisis, University Culpability and the Overseas Student Industry', *The Australian Population Research Institute*, Research Report, December 2022