

COVID-19 Source Markets and Competitor Summary

Objective

As the city's peak body for the education and training sector on the Gold Coast, Study Gold Coast is committed to advocating for the return of international students safely and in accordance with government health guidelines and protocols. The \$1.7B annual economic impact international education brings to the city will be critical to the city's successful recovery from the pandemic.

This paper outlines the status of Gold Coast's primary student source markets and adjacent markets with respect to the COVID-19 pandemic as at 24 November 2020. This data, to be updated on an ongoing basis, will inform Study Gold Coast's strategy towards International Education and Training recovery.

Primary Markets

Market	Active Cases	Total Cases per 1m population	Control Measures in Place
Brazil 5,533 int'l students as at Dec 19	473,368	28,561	<ul style="list-style-type: none"> The pandemic reached a peak in mid-August, when daily new case numbers hovered at 45,000, and has since steadily receded. The incidence of COVID-19 in Brazil remains high. Hospital occupancy rates have also declined in all regions and state capitals. Non-essential businesses and services have reopened (with restrictions), but public schools remain closed in most locations. Brazil has extended the temporary closure of its land and sea borders but is allowing entry by air. The federal government has reopened the borders of Brazil for foreign passengers traveling by plane. The restriction had been set in March. The entry ban remains however, in the states of Mato Grosso do Sul, Paraíba, Rondônia, Rio Grande do Sul and Tocantins.
China 4,351 int'l students as at Dec 19	322	60	<ul style="list-style-type: none"> Most businesses and schools have reopened nationwide, however social distancing rules remain in place at the micro level. Foreign entry remains restricted to contain imported cases. Localised movement restrictions were re-imposed in new hotspots, including in Jilin, Heilongjiang, Beijing, Liaoning, and more recently in Qingdao and Kashgar. These restrictions were lifted once the local outbreaks became under control. Testing and individualised health QR codes are used to gauge the path of the virus and contain outbreaks.
India 2,789 int'l students as at Dec 19	438,631	6,625	<ul style="list-style-type: none"> The incidence of COVID-19 in India continues to increase. Localised lockdowns are in place in some states however, there are graded relaxations in operation to aid economic recovery. On 30 September, the central government issued "Unlock 5.0" guidelines to allow state/union territory governments to decide

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			<p>on reopening schools and coaching institutions after October 15 in a graded manner.</p> <ul style="list-style-type: none"> • Cinemas/theatres/multiplexes are permitted to open with up to 50% of their seating capacity and entertainment parks will be permitted to open from 15 October. • The ceiling on congregations has been extended to 200 people. • The latest government announcements on 27 October extended localised lockdowns till 30 November, under the same guidelines as in “Unlock 5.0”.
<p>Japan</p> <p>1,914 int'l students as at Dec 19</p>	18,108	1,011	<ul style="list-style-type: none"> • Japan has resumed re-entry by all foreign nationals who possess the status of resident since September. • Japan has agreed on “Residence Track” which allows essential business exchange between certain countries, on condition they take preventive and quarantine measures. Countries include Brunei, Cambodia, Lao’s People’s Democratic Republic, Myanmar, Malaysia, Singapore, South Korea, Taiwan, Thailand and Vietnam. • Japan has agreed with Singapore and South Korea on “Business Track” which enables limited business activities during the 14-day stay at home period immediately after arrival on condition that travellers accept additional quarantine measures such as submission of “Schedule of Activities in Japan”. • Starting from October, the holders of statuses of residence of “Student”, “Dependent” and others, in addition to cross-border business travellers of all countries and regions have been permitted to enter Japan under the condition that the person is hosted by a company/entity that can assure observation of quarantine measures. • On 30 October, the Government of Japan removed the entry ban on Australia, Brunei, China (including Hong Kong and Macau), New Zealand, Republic of Korea, Singapore, Taiwan, Thailand and Vietnam.

*data as of 24 Nov 2020

(Coronavirus Update (Live): 60,050,716 Cases and 1,413,413 Deaths from COVID-19 Virus Pandemic - Worldometer, 2020) & (Policy Responses to COVID-19. (2020). IMF. <https://www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19>)

Adjacent / Secondary Markets

Market	Active Cases	Total Cases per 1M population	Control Measures in Place
<p>South Korea</p> <p>1,129 int'l students as at Dec 19</p>	4,121	611	<ul style="list-style-type: none"> • The authorities have implemented comprehensive testing and tracking, which has enabled early isolation and treatment. • New cases neared zero during the summer, but a milder “second wave” began in August and nationwide infections currently average about 200 per day.

			<ul style="list-style-type: none"> When using public transport and visiting a medical centre or aged-care facilities, people are required to wear a face mask, otherwise, penalties apply.
Taiwan 642 int'l students as at Dec 19	62	26	<ul style="list-style-type: none"> Between 1 December 2020 and 28 February 2021, arrivals need to provide a negative COVID-19 (PCR) test result issued within three business days before boarding entry to Taiwan, regardless of nationality, visa status, or whether one is arriving or transiting. Antigen or antibody test results will not be accepted. Face masks are mandatory in most public venues from 1 December. Fines apply.
Vietnam 410 int'l students as at Dec 19	126	13	<ul style="list-style-type: none"> Vietnam has not had new domestic transmission cases in the last 78 days. Mobile apps are available (installed by around 60 percent of population) to provide alerts on positive cases and potential exposures in big cities. A new guideline on epidemic protection has just been issued for normalisation of economic life. International tourist travel continues to be banned. In the meantime, authorities have allowed limited international commercial travels for some selected regional destinations since 19 September, while applying less restrictive 14-day quarantine requirement for short stay selected international visitors. Authorities have strengthened the policy on COVID-19 prevention i.e. since 15 November, anyone not wearing face masks at curtained public space can be fined.
Colombia 1,188 int'l students as at Dec 19	60,603	24,560	<ul style="list-style-type: none"> On 25 August, the end of quarantine was announced effective 1 September with some restrictions (consistent with the extension of the health emergency) including gatherings of more than 50 individuals, the operation of bars and land and sea borders remains closed. These restrictions remain in place until at least 30 November. Limited international air travel resumed on 19 September.

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Competitor Destination Market Summary

Source: Hearps, R. (2020, November 17). *What in the World is Happening to International Education?* [ICEF GmbH Presentation].

NEW ZEALAND

- Immigration NZ extended suspension of temporary (inc. student) visa applications from outside NZ until February 2021. i.e. unable to accept visa applications. The suspension came into effect on 10 August, originally for 3 months.
- A Ministry of Education head told one (secondary) school “not to plan on new international students until 2022”.
- One NZ (secondary) client told ICEF “Japanese agents are sending students to Canada instead” (of to us). They said, “students and families can’t wait any longer”.
- 250 international PhD and postgrad students “soon” to return to NZ to resume studies.
- First students were likely to arrive November 2020, with the majority arriving in the new year.
- See <https://monitor.icef.com/category/regions/australia-oceania/new-zealand/>.

CANADA

- Re-opened borders to international students from 20 October 2020.
- Students with valid study permits can enter if attending a designated learning institution (DLI). DLIs are identified as having an (approved) COVID-19 readiness plan in place.
- Students must quarantine for 14 days upon arrival.
- As at 27 October, there were 558 post-secondary institutions (inc. colleges, universities, private training institutes and language schools) on the DLI list.
- See <https://monitor.icef.com/category/regions/north-america/canada/>.

USA

- Under Trump, international enrolments have steadily declined.
- Biden has promised to repeal the ban on travellers from Muslim-majority nations.
- Election result has been a relief to educators and international students, however, not all Trump policies will be easy to repeal.
- Studyportals.com data shows 45% drop in interest in studying in US since last year.
- While Canada, Australia, UK and NZ also experienced drops in March, demand bounced back significantly in subsequent months. The US did not.
- See <https://monitor.icef.com/category/regions/north-america/united-states/>.

UK

- In late September and October, 24 UK universities chartered flights to bring students (both returning and new) from China to UK.
- Students showed proof of negative COVID-19 test taken 48 hours before departure.
- By end September, 40 UK universities had coronavirus cases and thousands of students were self-isolating as the new term began.
- By early December (if enough rapid COVID-detecting tests available), UK may institute “test and release” plan to shorten quarantine period for most international arrivals to one week.
- “Travel corridors” list (whose citizens do not have to self-isolate) are continually updated.
- See <https://monitor.icef.com/category/regions/europe/united-kingdom/>.

Closing

On 29 October 2020, the Australian Government released the “Protocols and preconditions for international student arrivals” document. The protocols stipulate that “student arrival plans must include students from a diverse range of source countries”. Accordingly, the intention is that a robust quarantine system will mitigate the need to discriminate against nationalities and enable students to return regardless of the COVID-19 situation in their source country.

The status of competitor countries and the methods they are adopting to expedite the return of international students (and the lessons learnt in the process) will be important intel to draw upon when refining the details of our plans.

The news of two potential COVID-19 vaccines showing promising results in late-stage trials has been welcomed by many, including those students looking to study on the Gold Coast.

Earlier this month, the [Federal Government released Australia's vaccination policy](#), said that while vaccinations will not be mandatory, a proof of vaccination may be required for people entering or returning to the country.

It was the first time the Government had given a firm indication of what future international travel might look like.

Further details of international travel requirements are still emerging, but experts have given some insight into what we might expect when those overseas journeys become possible again.