

Is Canada still in the 'big four' overseas student recruiters?

End of 'boom times' for Canadian institutions could prompt them to be more adventurous, with 'riskier' recruitment and more branch campuses likely, say experts

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A dramatic decline in international student numbers in Canada shows how internationalisation globally is “evolving”, with the concept of the “big four” recruitment destinations seen as increasingly outdated.

The country is on track to issue about 80,000 new study permits this year, way below the 437,000 cap its federal government set for 2025.

This has not stopped the cap being reduced further, with the budget announced earlier this month (<https://www.timeshighereducation.com/news/canadian-budget-cuts-international-student-cap-more-half>) confirming that it will be set at 155,000 next year – although the country could struggle to reach even this revised figure on the latest projections.

Although the other members of the “big four” – the US, the UK and Australia – have also been enacting policies that have brought down numbers, the fall in Canada has far surpassed anything happening elsewhere.

Lil Bremermann-Richard, chief executive of Oxford International, said it shows how the country has moved to an “evolving” strategy that is more focused on aligning with housing and labour market capacity.



Source: David Boily/AFP via Getty Images



“The government is moving toward a more managed, sustainable approach to welcoming international students rather than the rapid growth of recent years.

“We’ll likely see a shift away from a clearly defined big four toward a broader group of preferred destinations as more countries expand their international education capacity and appeal.”

The vast majority (82 per cent) of Canadian universities reported fewer overseas undergraduate students this year, according to a new survey from NAFSA, Oxford Test of English, and Studyportals (https://studyportals.com/reports/the-global-enrolment-benchmark-survey-aug-oct-2025-intake/?utm_campaign=20251117-RPT-The-Global-Enrolment-Benchmark-Report-August/October-2025-intake&utm_content=13/11/2025&utm_medium=website-3rdparty&utm_source=jour) published on 19 November. This was significantly more than in the US (48 per cent) and the UK (39 per cent).

Restrictive government policies was the biggest obstacle for 90 per cent of Canadian institutions – compared with 85 per cent in the US, 51 per cent in the UK and just 19 per cent across Asia.

This was clearly having a knock-on effect on the university finances, with 60 per cent of institutions anticipating budget cuts and 50 per cent expecting staffing reductions in the next year.

Canada still had close to a million international students in total when data was published earlier this year, compared with just under 500,000 in Germany, a country that has been rapidly increasing its overseas enrolments and could one day challenge the big four.

Vincenzo Raimo, an independent international higher education consultant and visiting fellow at the University of Reading (<https://www.timeshighereducation.com/world-university-rankings/university-reading>), said Canada was not leaving the international student recruitment business but that the business itself was changing.

The idea of a big four is increasingly outdated in a more multipolar world where intra-regional mobility (<https://www.timeshighereducation.com/news/big-four-becomes-big-14-dominating-international-education>) in Asia continues to increase and countries such as South Korea, Japan and Taiwan expand, he added.

“Global student mobility is becoming far more distributed, as students seek value, safety, post-study opportunities and predictability.”

Alex Usher, president of Higher Education Strategy Associates, said many international students were not coming to Canada for an education but for a chance to immigrate.

“No other country will give them that opportunity and so no other country will benefit. That’s a market that’s just going to dry up and blow away.”

Master's and PhD students at public universities in Canada have recently been exempted from the study permit cap, showing that the government could be open to making changes.

Janet Ilieva, founder of the Education Insight consultancy, said the budget's policies to attract international doctoral students and postdoctoral fellows indicated a "clear shift towards attracting top talent".

Globally, the restrictions being implemented by the larger anglophone markets are prompting a redistribution, rather than a shrinkage, of global demand for international education, she added.

"Inward-looking policies, coupled with geopolitical instability, rising economic uncertainty and regional conflicts, are increasing duty-of-care concerns. This is nudging students toward studying in safer, closer locations."

Recent figures also showed that Canadian universities have just seven international branch campuses abroad (<https://www.timeshighereducation.com/news/us-uk-and-russia-drive-growth-branch-campus-worldwide>) – fewer than Ireland, Germany and Netherlands, and well behind the US (97), the UK (51) and others.

Usher said this indicated that Canadian universities, and the governments that fund them, were "not very adventurous".

"During the boom times when international students were falling over themselves to come to Canada, there was no need for institutions to seek out extra cost and extra risk to teach international students (<https://www.timeshighereducation.com/news/branch-campus-rush-undermines-local-trust-universities>).

"I suspect we will [see more branch campuses in the future] but we have little tradition of doing so and we're starting from way behind. A switch like that takes time."

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