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Emerging Futures

Voice of the International Student

October 2026



About Emerging Futures

Amplifying the voice of international students

IDP's Emerging Futures research aims to equip the international education sector, institutions and policy makers with informed insights to offer exceptional global education experiences aligned to student priorities.

Emerging Futures, Voice of the International Student, examines the attitudes, motivations and intentions of international students.

Developed in consultation with sector stakeholders, the latest Emerging Futures survey explores how students assess value and return on investment when choosing where to study. It examines how visa policies and post-study pathways are shaping destination choice, alongside shifting interest towards emerging study destinations.



Research summary

Emerging Futures, published October 2026, suggests that international students remain highly committed to studying abroad, but are becoming increasingly strategic in how they evaluate destinations, institutions and pathways.

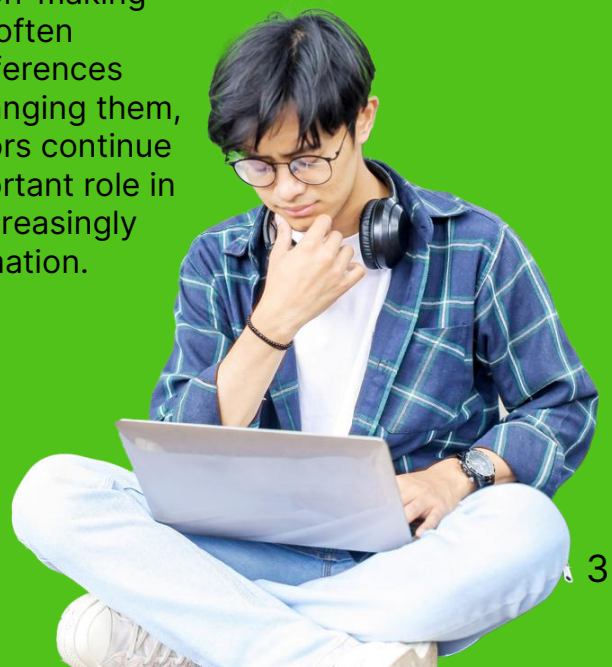
Students are placing greater emphasis on value, employability and visa certainty, while assessing options through a more deliberate and comparative decision-making process. Destination choice is increasingly shaped not only by education quality, but by confidence in future career outcomes, affordability and the perceived likelihood of achieving study and work ambitions.

Visa prospects are increasingly influencing destination consideration at the earliest stages, with 51% of prospective and applied students saying their chances of obtaining a student visa strongly influenced the destinations they would consider, while 47% of applied students considered their visa prospects before or during destination shortlisting.

The findings point to an increasingly competitive global market in which students are comparing more options and keeping alternatives open for longer. Australia, the UK and the USA continue to dominate consideration, but the gap between leading destinations has narrowed as students distribute preferences more broadly across established and emerging destinations.

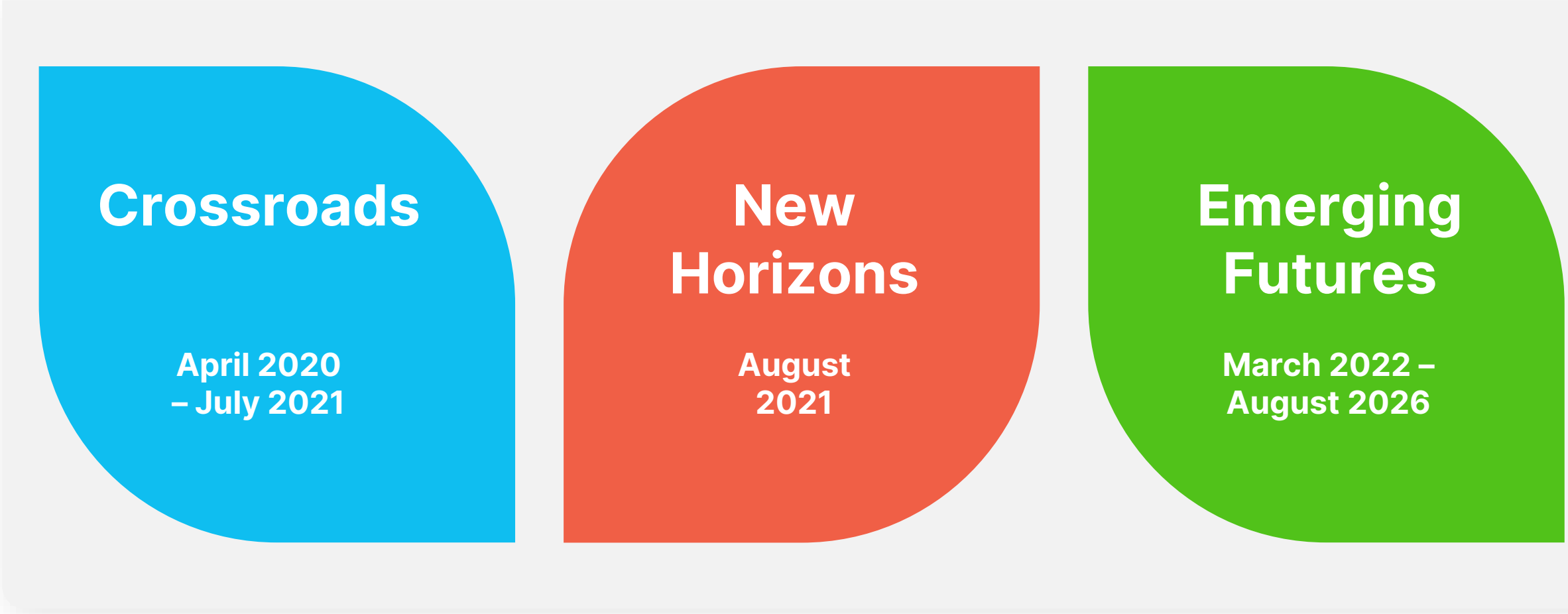
Interest in transnational education continues to grow as students seek more affordable access to international education and employment opportunities abroad.

New areas explored in this wave provide deeper insight into how students navigate complexity and evaluate future outcomes. Generative AI is now firmly embedded in the student decision-making process, most often confirming preferences rather than changing them, while counsellors continue to play an important role in interpreting increasingly complex information.



Evolution of our research

125,000+ students surveyed over 16 surveys



Research context

A survey of over 4,800 students (prospective, decliner, applied, current and completed)

15-minute survey



Administered in English and Chinese



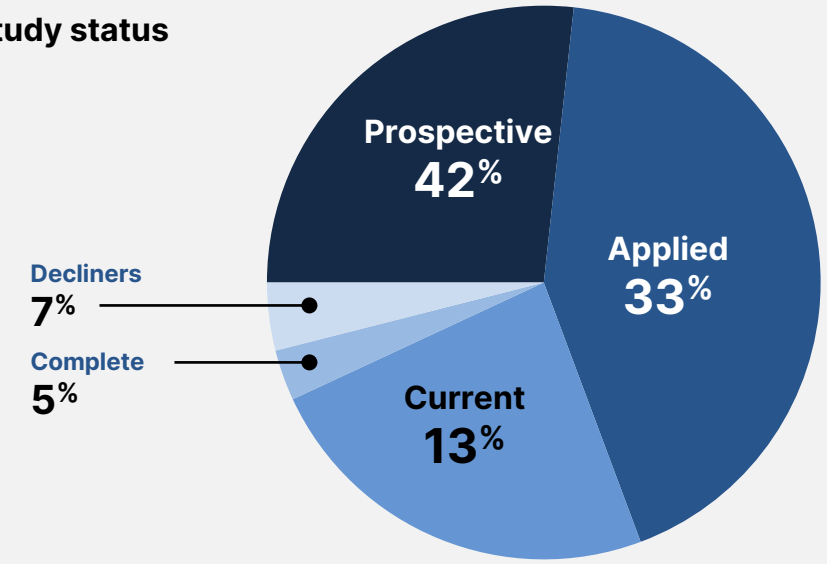
Conducted between 18 Aug 2026 – 16 Sept 2026



Student respondent profile

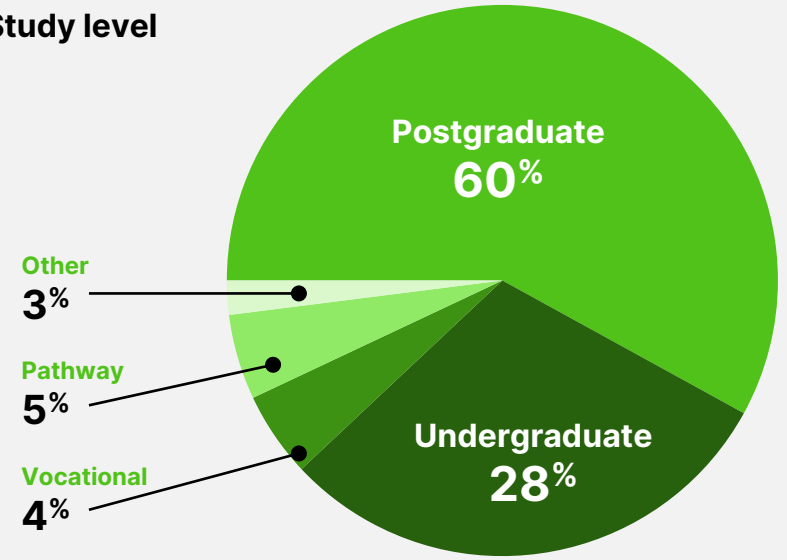
The makeup of our student survey takers

Study status

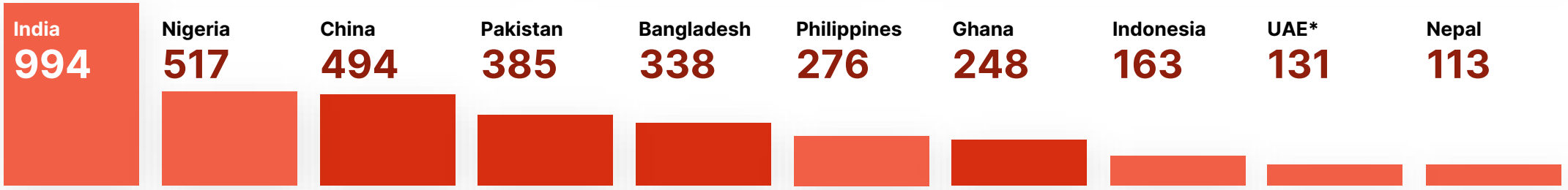


Respondents from 106 countries and regions

Study level



Top 10 source markets



*Note: Results for UAE include students who have enquired or lodged an application from the IDP UAE office.

Key findings

Headlines from Emerging Futures October 2026



Key findings

What insights can institutions, governments and the sector take away?

Four in five students shop around as global competition for international students intensifies. Visa certainty, affordability and career outcomes are increasingly shaping where students choose to study.

Students are adapting how they access international education.

Demand for international education remains strong, but students are becoming more flexible in how they pursue it. 83% of prospective students considered more than one destination, while interest in all modes of transnational education (TNE) have increased since our last survey, led by branch campuses at 59%, up from 52% in March 2026.

Policy confidence is becoming a competitive advantage.

Visa approval prospects, policy stability and post-study work certainty now influence destination decisions earlier in the student journey. Half (51%) of prospective and applied students say visa approval prospects strongly influenced destination choice, while nearly half (47%) of applied students first consider visa success before or during destination shortlisting.

Cost pressure is increasingly shaping student behaviour

The proportion of students no longer considering international study increased from 11% to 16% since our last survey, with the leading reasons for this are all financial; living costs (41%), tuition fees (40%) and student visa costs (22%). Reduced overall cost is also the top reason for considering TNE options.

AI is guiding decisions, not replacing them.

Students are embracing AI as part of their research journey, using it primarily to validate choices and better understand future career opportunities. 41% of all students have used generative AI when researching international education, while 61% of prospective and applied students say AI confirmed rather than changed their preferred study options.

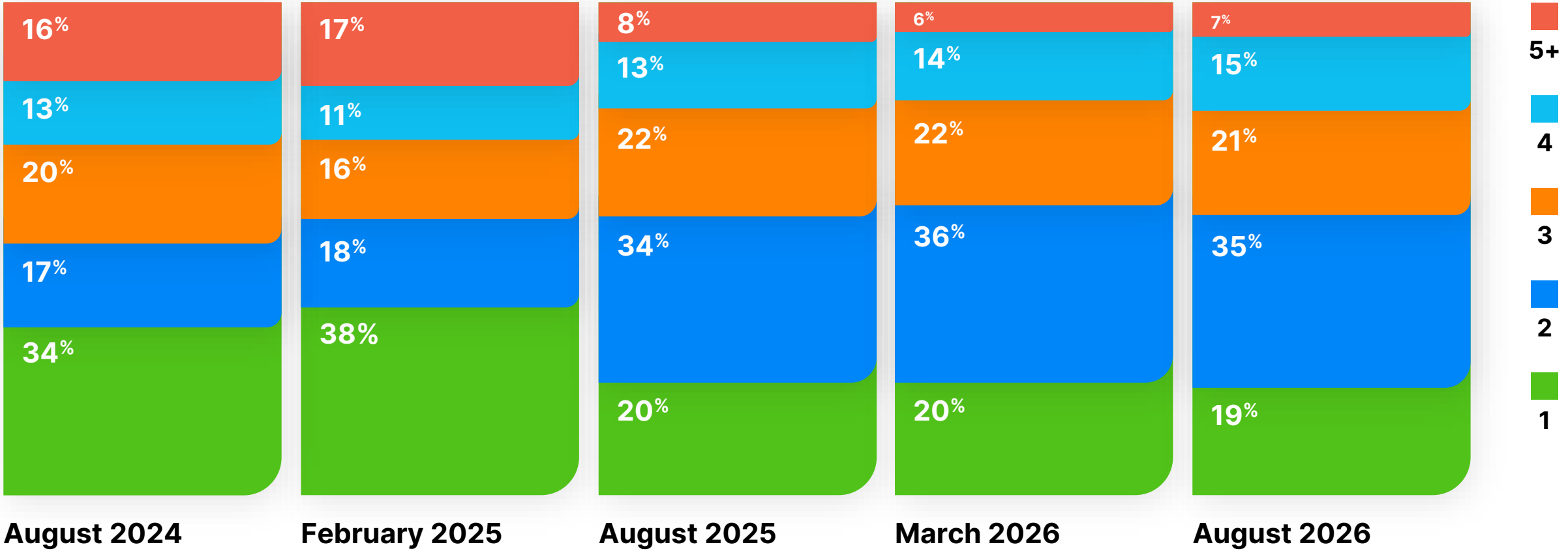
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Visa certainty, affordability and career outcomes are increasingly shaping where students choose to study



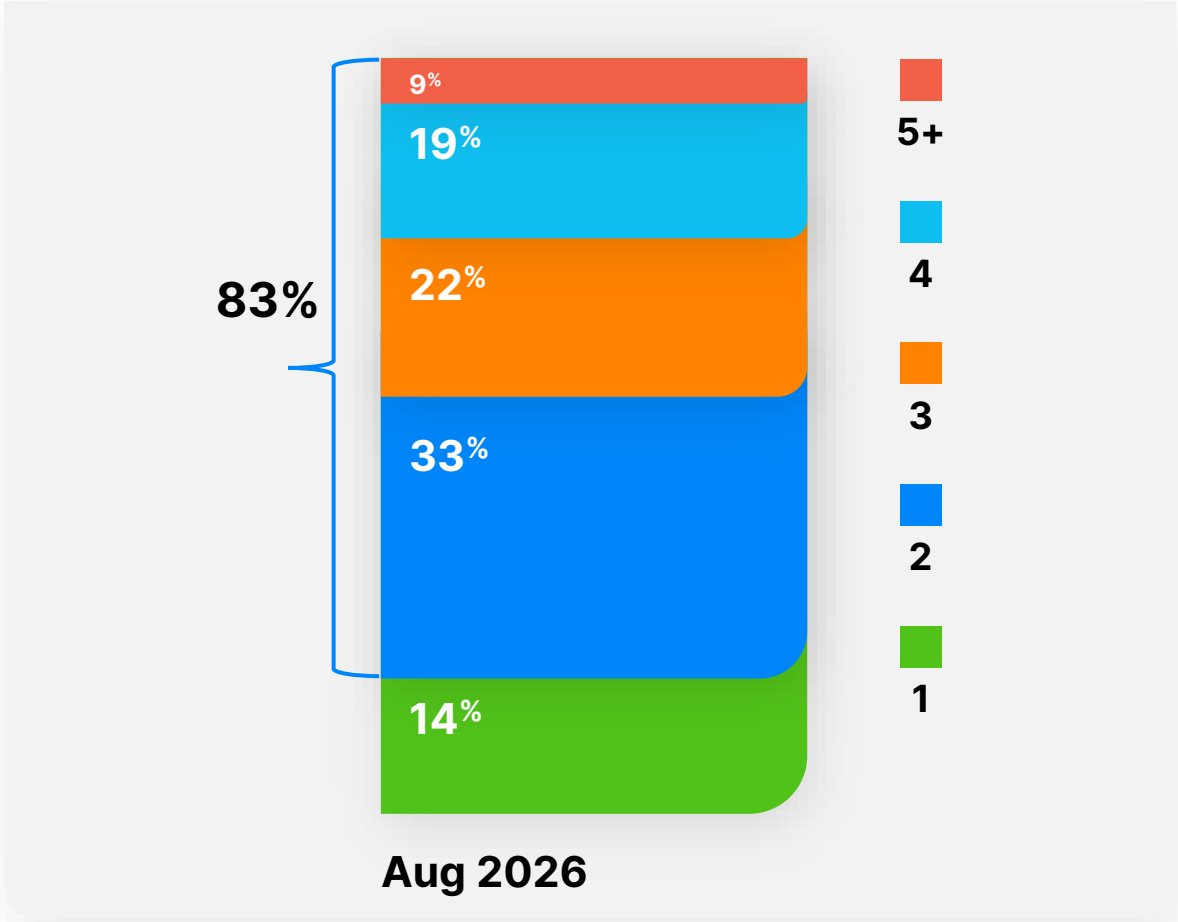
The majority of students are comparing multiple destinations



Question (August 2023 – February 2025 surveys): Which country did you consider/are you considering? Selected countries are aggregated to reflect the total number of countries considered.
Question (August 2025+ surveys): How many different countries did you seriously consider as potential study destinations?; Responses for 'I'm not sure/ I don't remember' are not shown. n=4,264

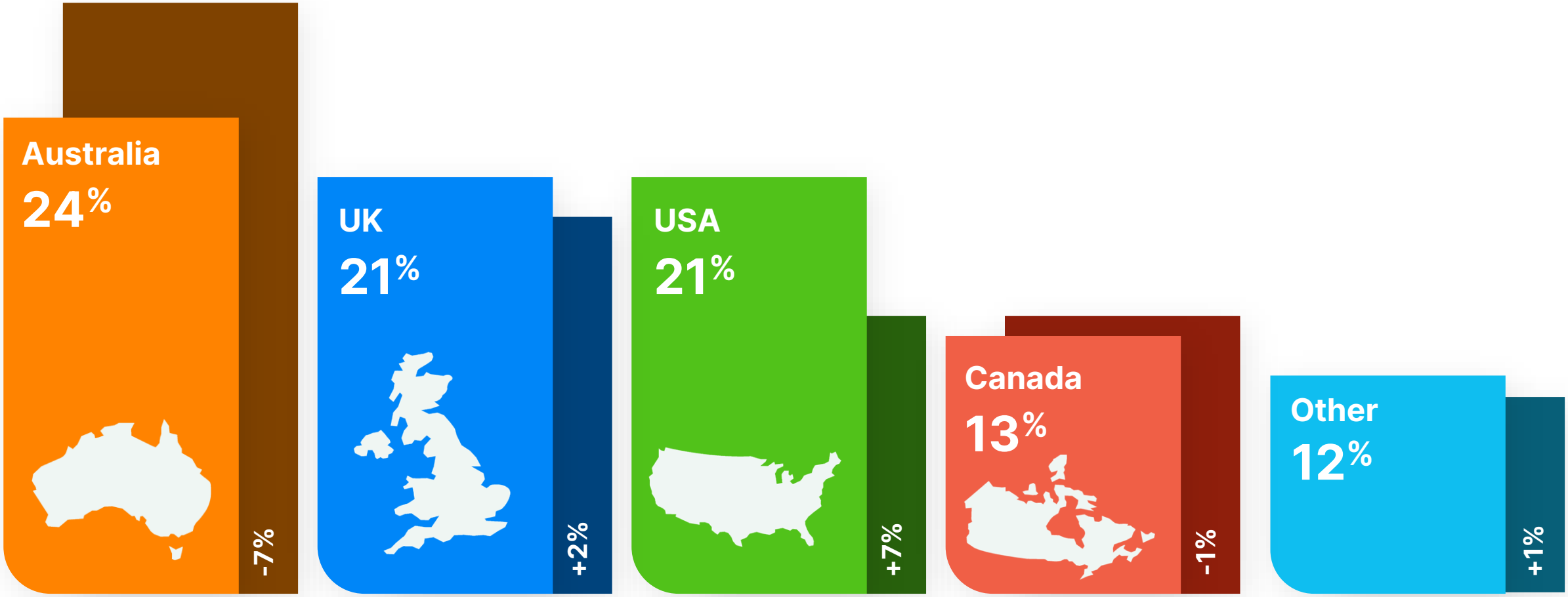
Prospective students are more likely to be considering more than one destination

Compared to the average of all Prospective, Applied and Current students (78%)



Question (August 2025+ surveys): How many different countries did you seriously consider as potential study destinations?; Responses for 'I'm not sure/ I don't remember' are not shown.
n=2,027

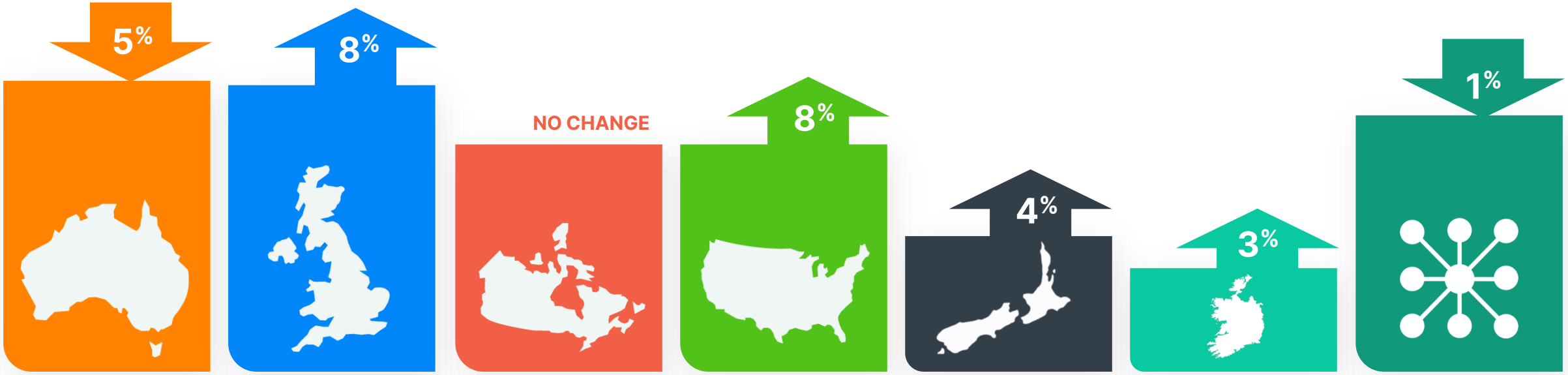
Competition for first-choice destination preference intensifies as the gap between Australia, the UK and USA narrows



Question: From the list of countries below, please rank your top four (4) study destinations, rank 1 being your first choice to study in.
You may rank the countries by typing in 1 to 4 in the box, with rank 1 being your first-choice destination.
NZ 5% and Ireland 4% not shown

Emerging Futures Aug 2026 (n=3,352) compared with Emerging Futures March 2026 (n=5,316)

Australia remains the most considered destination despite a decline, while the UK and USA see strong gains since Feb 2026



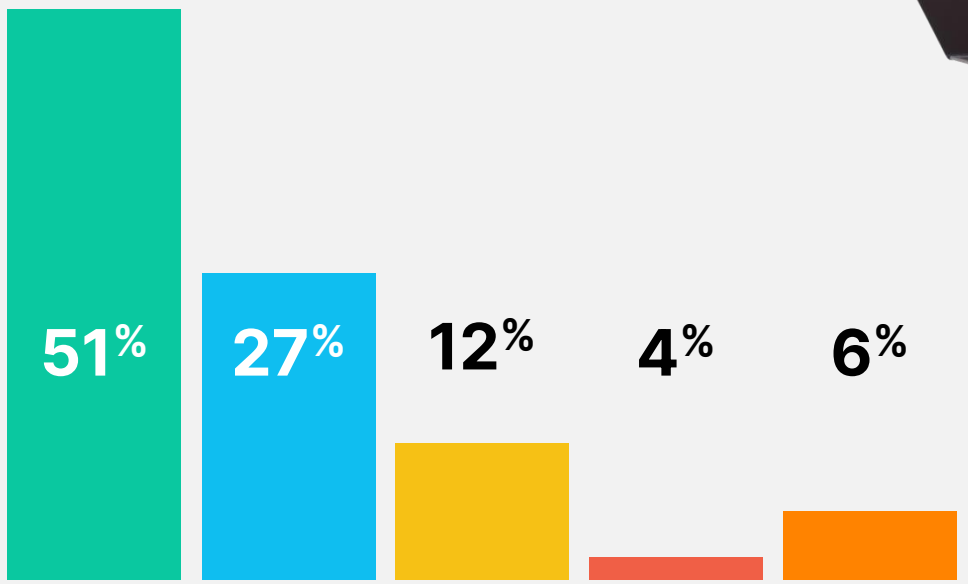
Australia	UK	Canada	USA	NZ	Ireland	Other
54%	53%	42%	42%	25%	19%	48%

Question: Which countries are you considering or did you consider studying in, or receive your international qualification from?
[Arrow indicates percentage-point change compared with Emerging Futures March 2026]
n=4,244

NEW

Visa approval prospects play an important role in destination consideration

Influence of student visa approval prospects on destination consideration





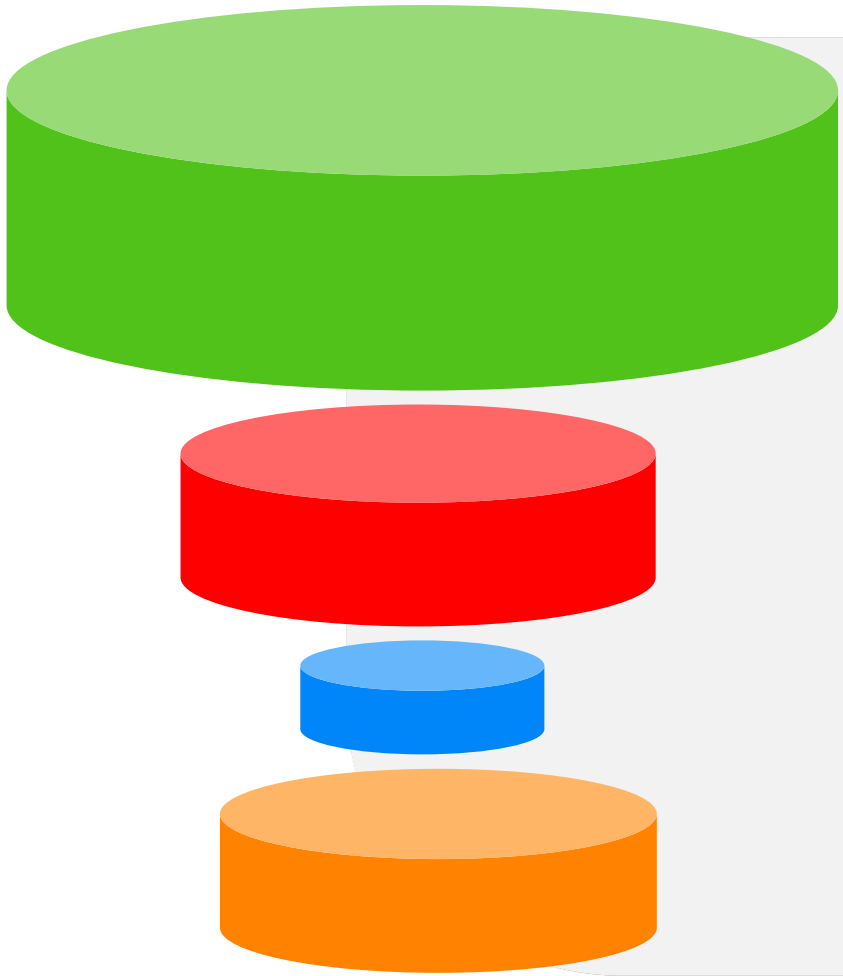
Overall, obtaining a student visa is a major factor in destination choice, with 51% of prospective and applied students saying it strongly influences ("a lot") the countries they consider for study.

Question: How much did each of the following situations influence which countries you considered for study?
Scale: A little, A lot, Not at all, Somewhat, Not sure
n=2,919
Note: Prospective and Applied students only

NEW

Visa approval prospects influence destination consideration well before students begin applying





47% Considering international study/ making a destination shortlist

21% Choosing destinations

9% After applying

19% After receiving an offer

Question: When did your chances of getting a student visa first influence which countries you considered for study?
Responses for 'Not sure' are not shown.
n=1,097
Note: Applied students only; Considering international study' refers to respondents who selected 'Before I started making a shortlist of destinations' in the survey. This has been interpreted as the initial consideration stage of the study abroad journey.

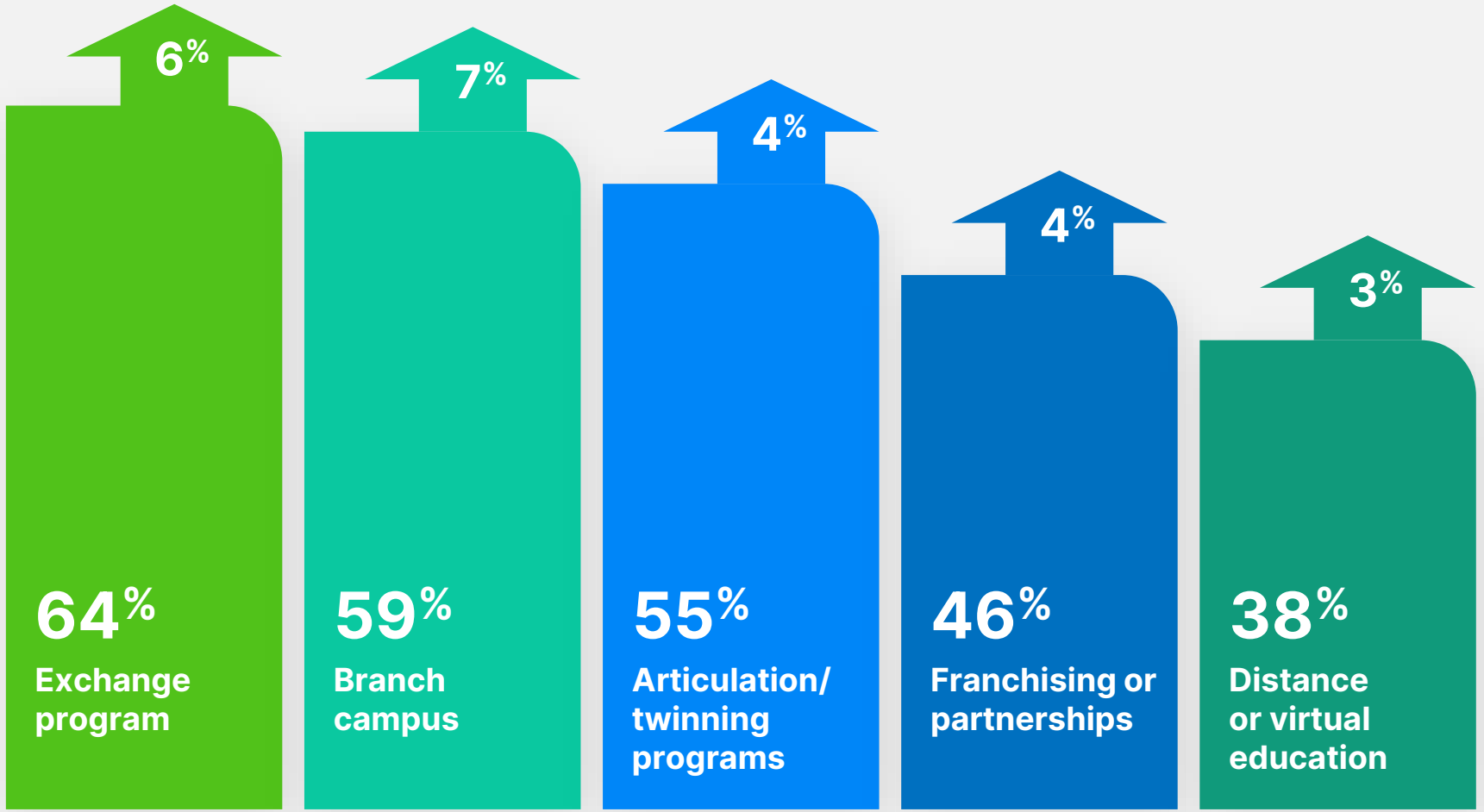
Visa refusals change destination choice

"[My] visa was refused. So, I gathered the information, looked at the reason why my visa was refused, and then applied to a different country."



PG Applicant, Ghana

The TNE models tested are gaining appeal, with student consideration up across all since our last survey



Branch campuses have seen the greatest increase in interest since our last survey, followed by exchange programs

Question: Many institutions that have their home campus in one country now deliver their courses and programs in another country, either through their own campuses or through an official partnership with another institution. This means it is possible to study a course or program in one country while the accrediting institution is based in another country. This is known as Transnational Education (TNE). Which of the following options are you considering or would consider studying through transnational education (TNE)? n=1,378
Note: Prospective students only [Arrow indicates percentage-point change compared with Emerging Futures March 2026]

Cost has overtaken employment opportunities as the leading motivation for considering TNE



52%

Reduced overall cost



44%

Improved employment opportunities abroad



40%

Pathway or transfer opportunities to study overseas later

'Reduced overall cost' is again the top motivation for considering TNE (as it was in our Aug 2025 survey), ahead of improved employment opportunities abroad.

Students appear receptive to models that reduce upfront cost and risk while preserving opportunities for international mobility, progression and career outcomes.

TNE is increasingly attractive as a more affordable route to international education.

Question: What are your main motivations for considering transnational education (TNE)?
n=1,140
Note: Prospective students only

Rising costs remain the biggest barrier to international study for decliners, while visa challenges and work prospects also deter students

Cost of living has become too expensive
41%



I could no longer afford the tuition fees
40%



The student visa application fee was too expensive
22%



It is too difficult getting a student visa
19%



There is no guarantee of post-study work opportunities
13%



Question: Which among the following reasons explain why you are no longer pursuing your international studies? Please choose up to three reasons most applicable to you.
n=319
Note: Decliners only

Cost concerns affect choice



"For the upcoming year, you need to have more funds compared to the previous year. In [a bigger city], your expenses are more, whereas in another part of the country the living cost is less. Those things matter a lot, because I have changed my institution just because of this."

Prospective PG student, India

NEW

Traditional sources (university websites, rankings) still dominate as most used information sources for research



60%

University websites



46%

University rankings



42%

Course comparison websites



41%

ChatGPT, Gemini, CoPilot, DeepSeek, or other generative AI



40%

Social media

Question: Which of the following sources have you used when researching or making decisions about international study? Please select all that apply.
n= 3,832

NEW

Alongside digital sources, personal recommendations and direct interactions remain important in students' international study research



37%

Counsellor or other professional advisors



37%

Talking with friends or family



28%

Online events (e.g. webinars, virtual tours)



25%

Talking with real students (online or in person)



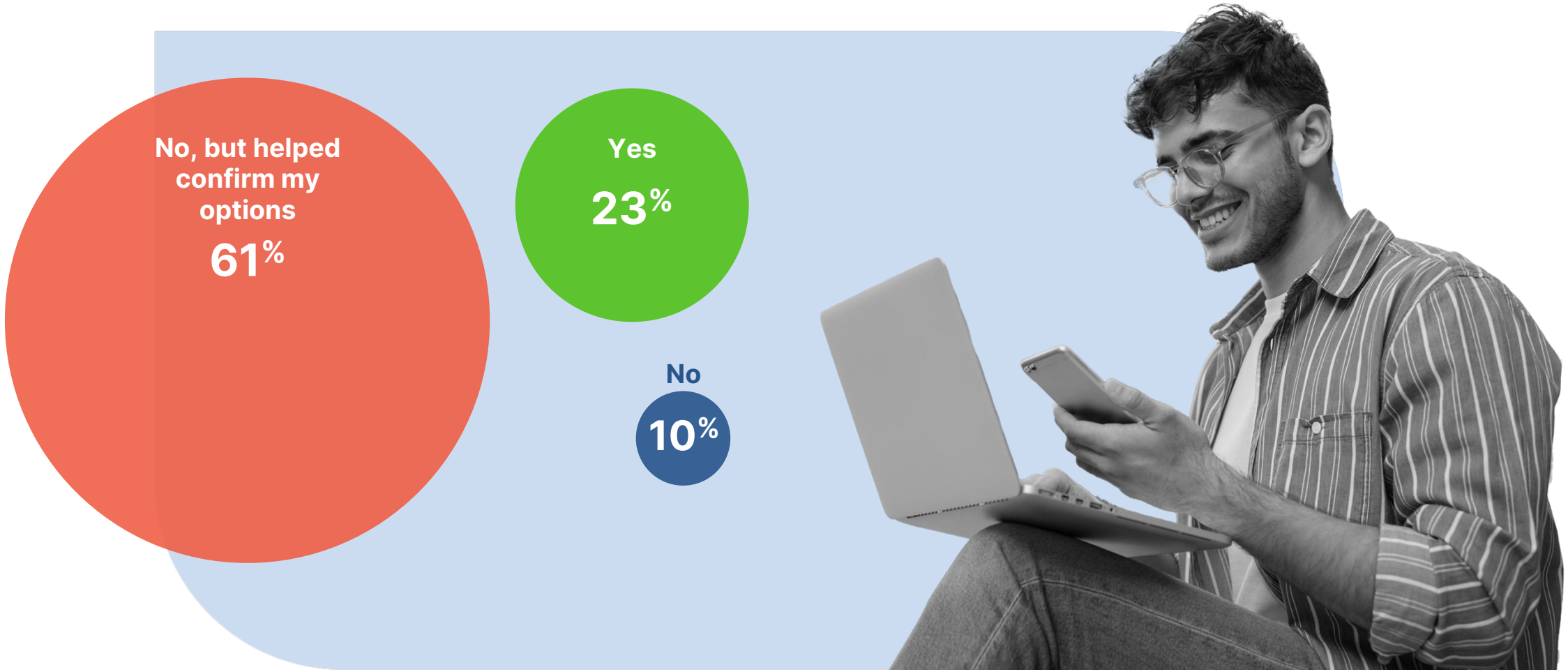
21%

In-person events (e.g. open days, campus visits, fairs)

Question: Which of the following sources have you used when researching or making decisions about international study? Please select all that apply.
n= 3,832

NEW

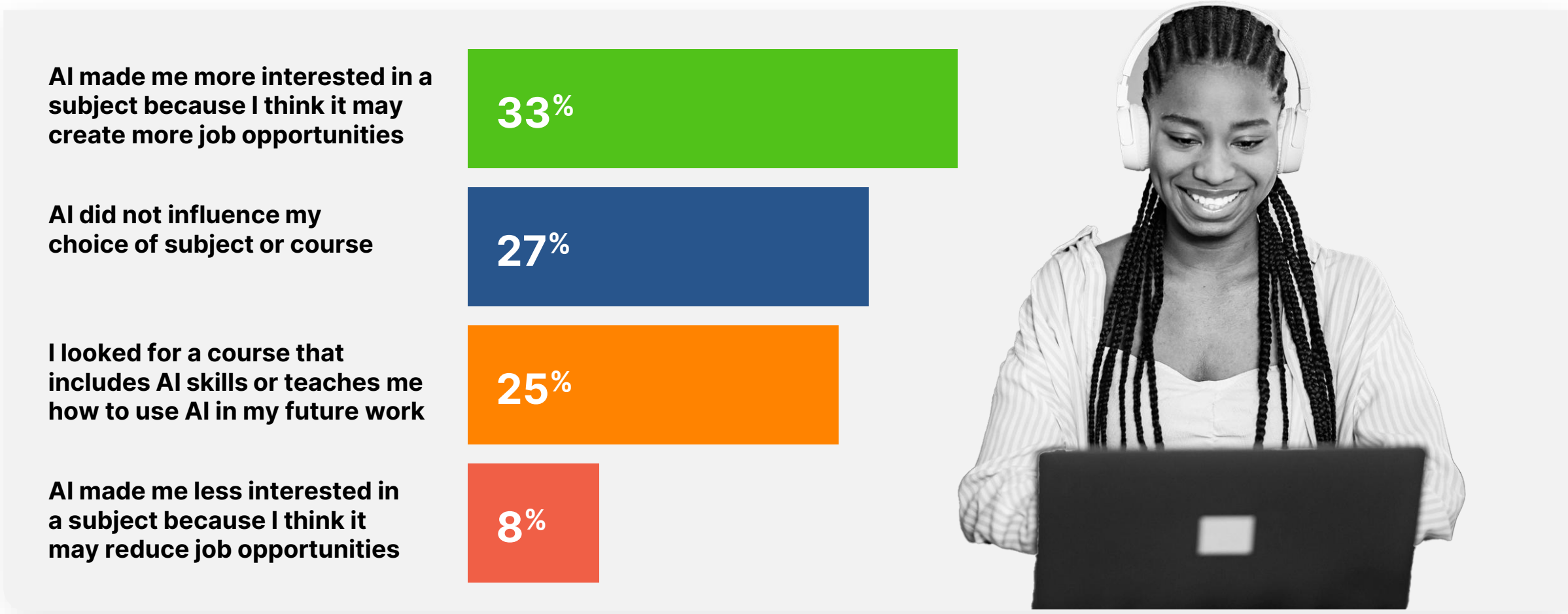
AI is influencing student choices, but primarily by confirming rather than replacing decision making



Question: Did using AI change any of the study options (e.g., study destination, institution or program) you preferred?
n= 1,041
Note: Prospective and Applied students only
Asked only to those who chose ChatGPT, Gemini, CoPilot, DeepSeek, or other generative AI in previous question
Haven't decided yet (4%) and Not sure (2%) not shown

NEW

AI is beginning to reshape course demand through expectations about the future labour market



Question: When choosing a subject or course, how did the possible impact of AI on future job opportunities influence your choice?
n= 2,302
Note: 'Not sure' 4% and 'I have not chosen a subject or course yet' 3% not shown
Prospective and Applied students only

NEW

As AI becomes more common in the workplace, students identified ‘AI and technology skills’ and ‘problem solving’ as among the most important skills for success in future jobs

42%
AI and technology skills
Knowing how to use, develop or work with AI tools

41%
Problem solving
Understanding problems, making decisions and finding solutions

38%
Adaptability
Learning new skills and adjusting as jobs and technology change

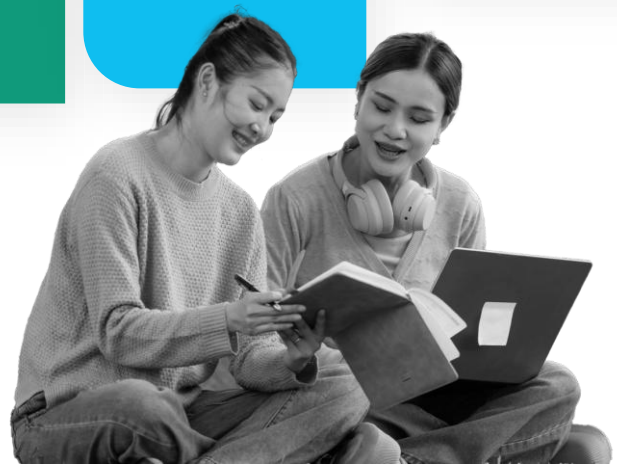
38%
Critical thinking
Checking whether information from AI is correct and useful

32%
Creativity
Developing original ideas and guiding creative work

31%
Communication
Explaining ideas clearly and working well with other people

24%
Leadership
Helping people and organisations manage changes caused by AI

20%
Cross-cultural collaboration
Working well with people from different countries and cultures



Question: As AI becomes more common at work, which skills do you think will be most important for success in future jobs? Please select up to three.
n= 2,708
Note: Prospective, Applied and Current students only

AI is changing how students verify advice

"I watched many YouTube videos, researched on Google and I took help of AI as well. Then I used to visit the official websites and cross-check the information. And when I found that information relevant and correct on the official website, then, for me, it was, like, a green signal to go."



Prospective PG student, India

Contact us for further analysis or comment



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