



**EMERGING FUTURES**  
**VOICE OF THE**  
**INTERNATIONAL**  
**STUDENT**

# RESEARCH CONTEXT

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A survey of students (prospective, applied, current and complete)

## INTERNATIONAL STUDENT PERCEPTIONS, CHOICES AND MOTIVATIONS

IDP's *Emerging Futures* research on the perceptions of international students builds on the findings of the *Crossroads* and *New Horizons* research series, and 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 and intentions of more than 11,500 prospective, applied, current and completed international students from 117 different countries.

15 minute  
survey



Administered  
in English  
and Chinese

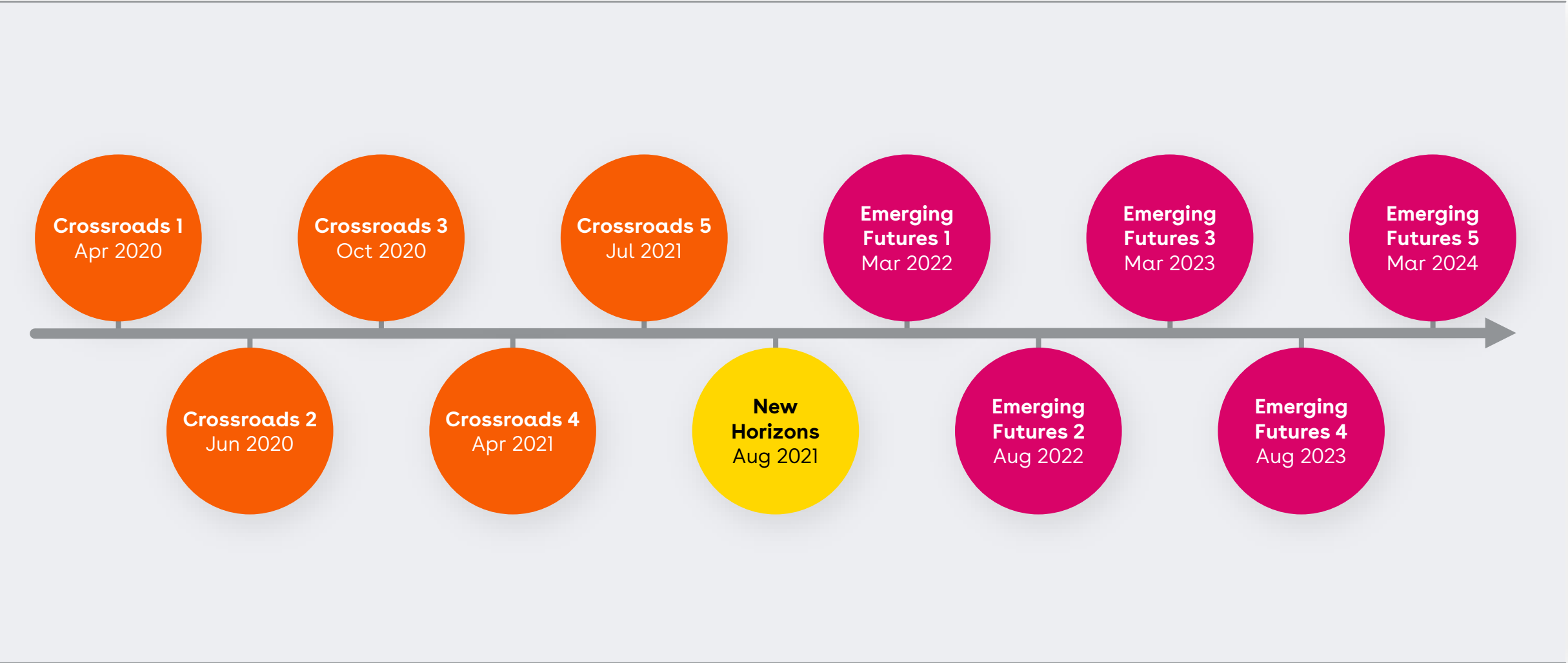


Conducted  
between  
February 22 -  
March 19, 2024



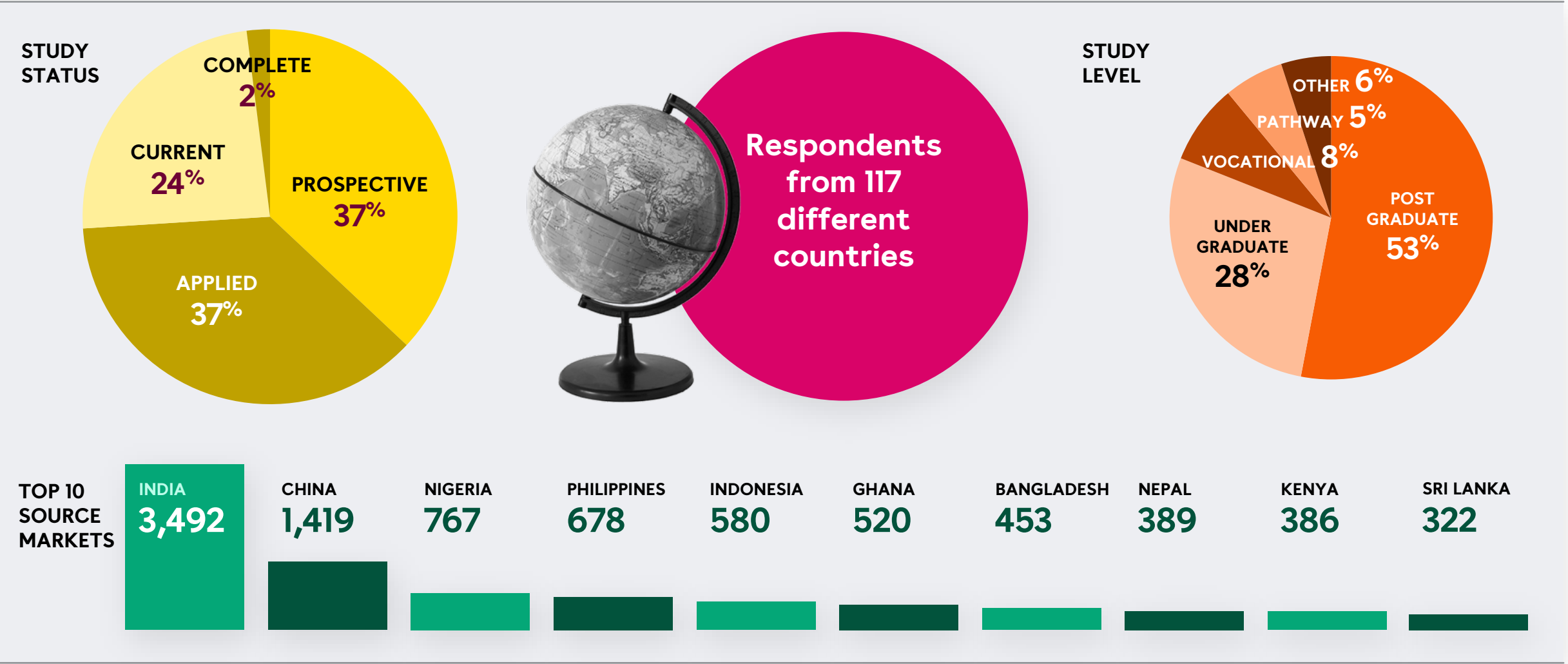
# EVOLUTION OF OUR RESEARCH

95,000+ students surveyed across 11 research studies



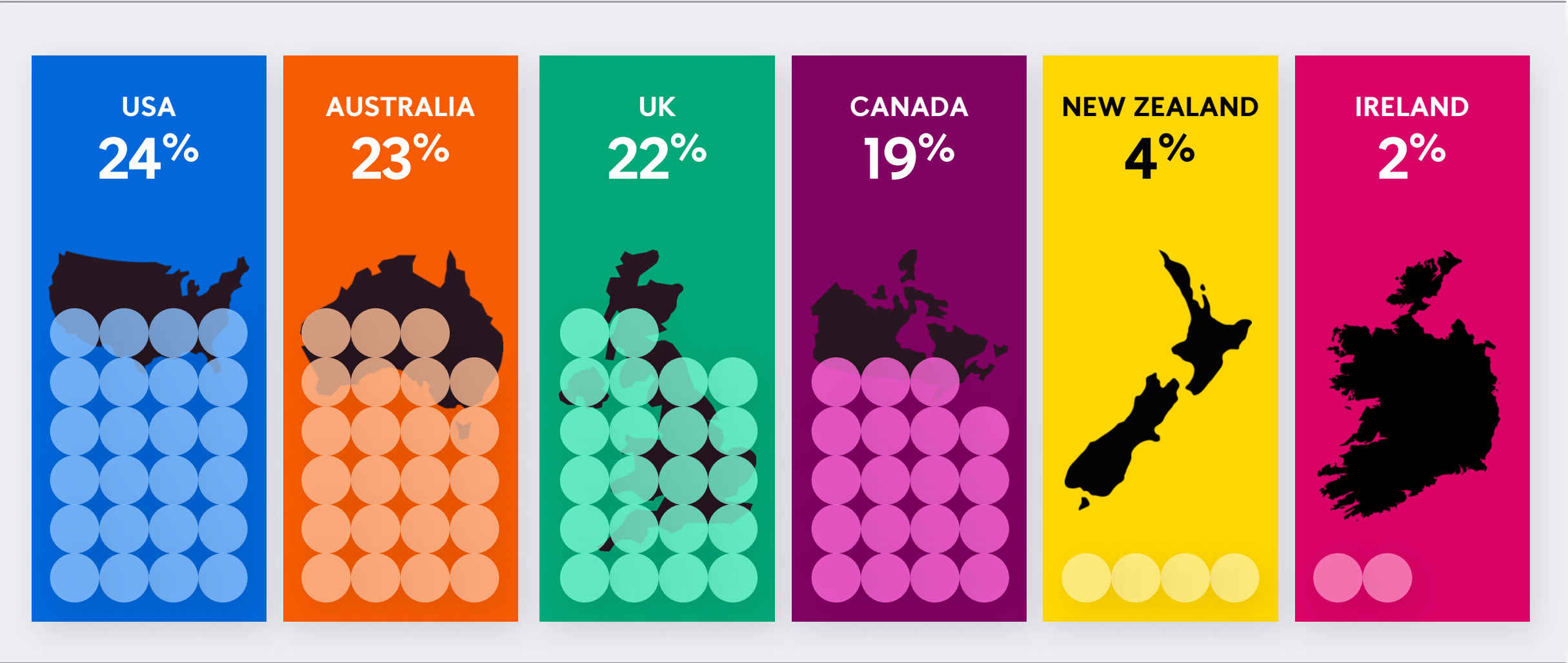
# STUDENT RESPONDENT PROFILE

11,500+ student respondents from across the globe



# WHICH DESTINATIONS ARE FIRST CHOICE?

The US is the most desired destination for the first time in Emerging Futures series



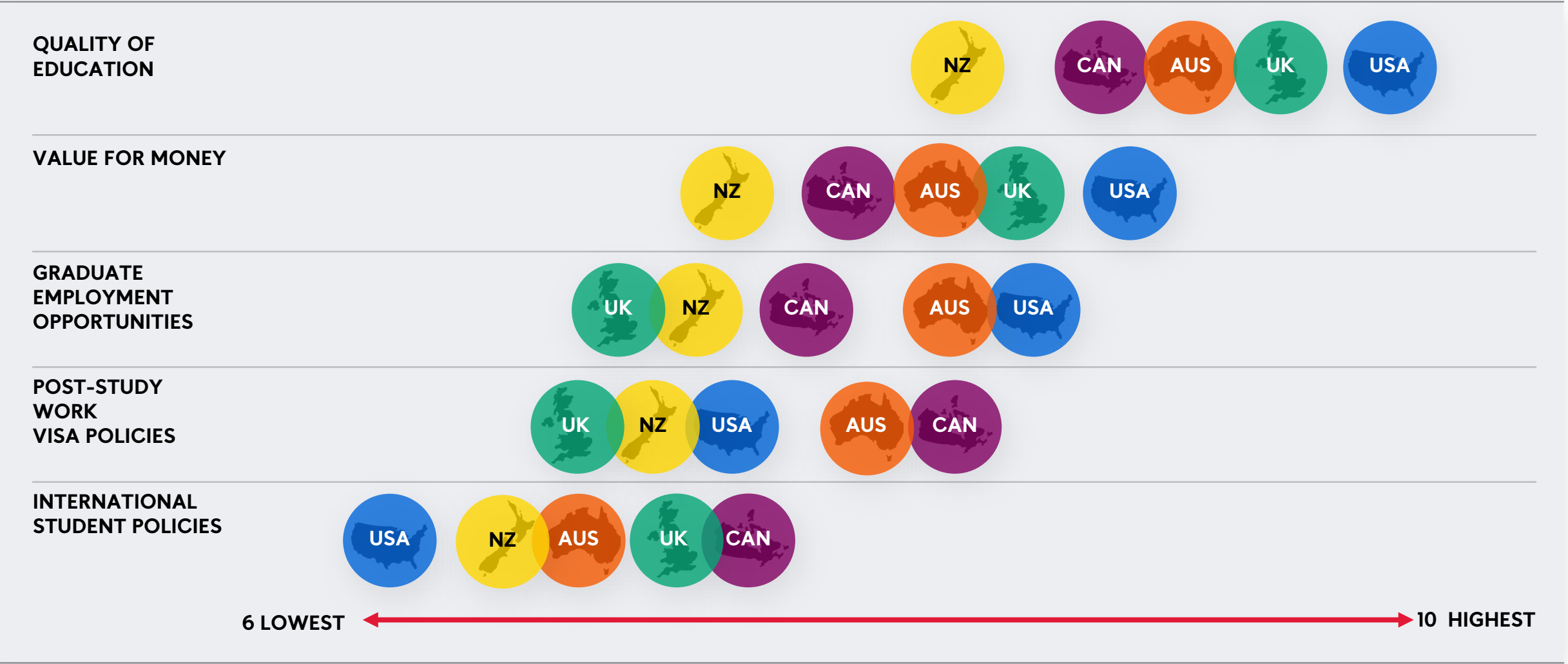
# PRIMARY FACTORS IN FIRST CHOICE

Why did you choose your first-choice destination?

| GRAND TOTAL                                      | USA                                              | AUSTRALIA                                        | UK                                               | CANADA                                           | NEW ZEALAND                                      |
|--------------------------------------------------|--------------------------------------------------|--------------------------------------------------|--------------------------------------------------|--------------------------------------------------|--------------------------------------------------|
| 1 High quality of education                      | 1 High quality of education                      | 1 High quality of education                      | 1 High quality of education                      | 1 High quality of education                      | 1 Safe country for international students        |
| 2 Good employment opportunities after graduation | 2 Good employment opportunities after graduation | 2 Safe country for international students        | 2 Good employment opportunities after graduation | 2 Safe country for international students        | 2 High quality of education                      |
| 3 Safe country for international students        | 3 Availability of scholarships                   | 3 Good employment opportunities after graduation | 3 Availability of scholarships                   | 3 Good employment opportunities after graduation | 3 Good employment opportunities after graduation |
| 4 Availability of scholarships                   | 4 Institutions are attractive                    | 4 Part-time work opportunities are good          | 4 Institutions are attractive                    | 4 Ease of obtaining permanent residency          | 4 Welcomes people from other countries           |
| 5 Part-time work opportunities are good          | 5 Good internship opportunities                  | 5 Availability of scholarships                   | 5 Part-time work opportunities are good          | 5 Supports international students                | 5 Supports international students                |
| 6 Supports international students                | 6 Supports international students                | 6 Supports international students                | 6 Safe country for international students        | 6 Welcomes people from other countries           | 6 Availability of scholarships                   |

# PERCEPTIONS OF STUDY DESTINATIONS

Student perceptions of top destinations





# UNDERSTANDING QUALITY

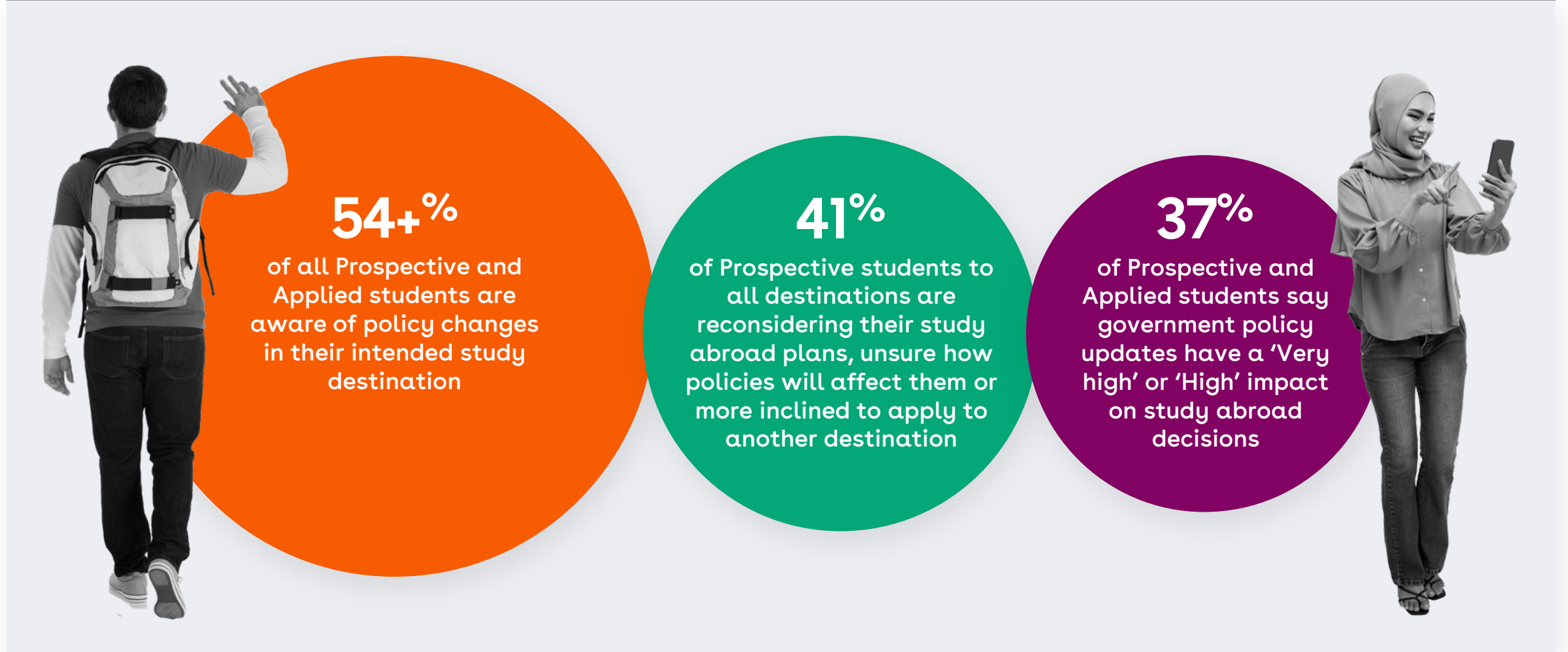
What factors are important to students in understanding “high quality education”?

|   | GRAND TOTAL                                 | UK                                          | AUSTRALIA                                             | CANADA                                                | USA                                                   | NEW ZEALAND                                           |
|---|---------------------------------------------|---------------------------------------------|-------------------------------------------------------|-------------------------------------------------------|-------------------------------------------------------|-------------------------------------------------------|
| 1 | Availability of graduate employment schemes | Availability of graduate employment schemes | World-renowned/high-reputation institutions           | Availability of graduate employment schemes           | World-renowned/high-reputation institutions           | Availability of graduate employment schemes           |
| 2 | World-renowned/high-reputation institutions | World-renowned/high-reputation institutions | Availability of graduate employment schemes           | Wide range of academic programs                       | Wide range of academic programs                       | World-renowned/high-reputation institutions           |
| 3 | Wide range of academic programs             | High ranking of institutions                | High ranking of institutions                          | Post-study work policies                              | Availability of graduate employment schemes           | Access to a diverse network of international students |
| 4 | High ranking of institutions                | Post-study work policies                    | Wide range of academic programs                       | Access to a diverse network of international students | High ranking of institutions                          | Wide range of academic programs                       |
| 5 | Post-study work policies                    | Global leader in a range of fields          | Access to a diverse network of international students | World-renowned/high-reputation institutions           | Access to a diverse network of international students | Pathways to migration                                 |



# POLICY UPDATES

## Key headlines



**54+%**

of all Prospective and Applied students are aware of policy changes in their intended study destination

**41%**

of Prospective students to all destinations are reconsidering their study abroad plans, unsure how policies will affect them or more inclined to apply to another destination

**37%**

of Prospective and Applied students say government policy updates have a 'Very high' or 'High' impact on study abroad decisions

# KEY TAKEAWAYS

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

## STUDENT PERCEPTIONS & PREFERENCES ARE EVOLVING

Since the last Emerging Futures in August 2023, there has been a significant change in top first-choice study destinations, with Canada falling from joint-first to fourth and the US rising from fourth to first.

These results reflect the impact policy changes in top study destinations like Canada, Australia and the UK are having on prospective international students. International students are chasing lifechanging goals. They will adjust their destinations if they feel they will be more welcomed and receive a higher quality of education in another destination.

## QUALITY IS MOST IMPORTANT

‘High quality of education’ remains the number one factor influencing first-choice destination. Perceptions of this factor have declined for Australia, Canada and the UK since August 2023.

In this survey, students were asked ‘What factors are most important in understanding if the country provides “high quality education”?’, with the top answer being ‘availability of graduate employment schemes’. This shows how interconnected perceptions around quality and outcomes are to future applicants and should be a focus for attracting and retaining international students.

## POLICIES IMPACT DECISION-MAKING

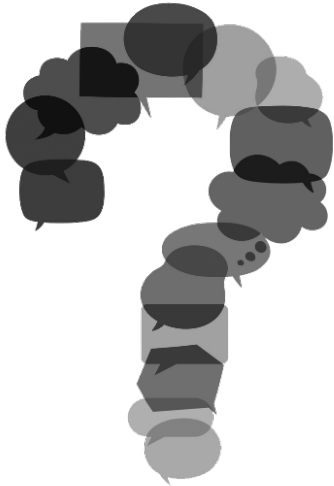
The majority of students are aware of policy changes affecting international students in their chosen study destination, with varying degrees of awareness depending on the policy.

Prospective students are weighing up their options when considering a study destination, with 41% reconsidering their study abroad plans, applying to another destination or still unsure how policies will affect them. Clear and concise messaging, specifically for international students, is needed to help them understand how destination policy changes may impact their experience.

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# QUESTIONS



## Media Contact:

Annie Collison – Porter Novelli

[acollison@porternovelli.com.au](mailto:acollison@porternovelli.com.au)

+61 406 080 356

## Contact IDP Connect:

[www.idp-connect.com/contact](http://www.idp-connect.com/contact)

## On the web:

[www.idp-connect.com/emergingfutures](http://www.idp-connect.com/emergingfutures)