

Emerging Futures 6

**Voice of the
International
Student**

October 2024



Evolution of our research

100,000+ international students surveyed over 12 surveys



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.

New in this survey, students and parents were interviewed about key themes, such as effects of global policy updates and choosing an institution, that are important to when studying internationally. IDP counselors were also asked what sentiments and behaviors they are seeing on the ground.



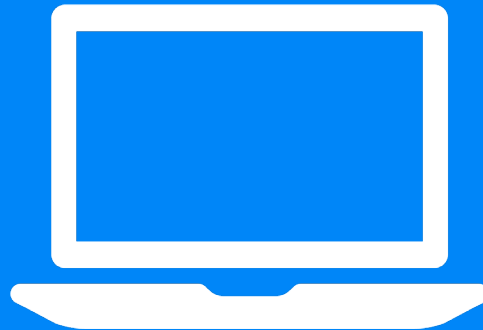
Research context

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

15-minute survey



**Administered
in English and
Chinese**



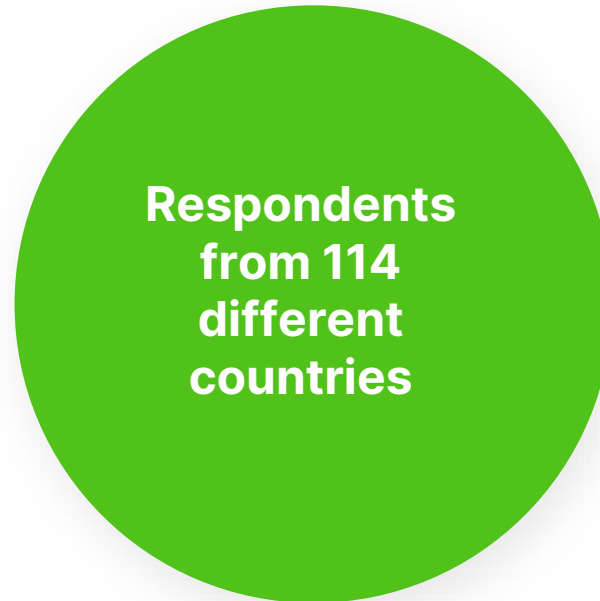
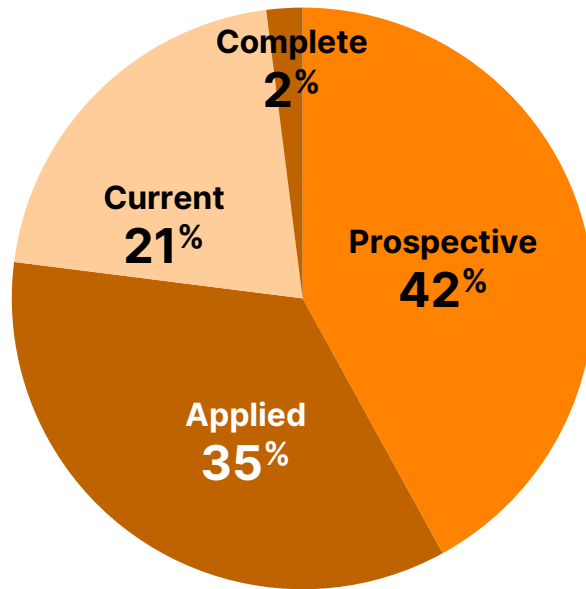
**Conducted
between
August 20 –
Sept 16 2024**



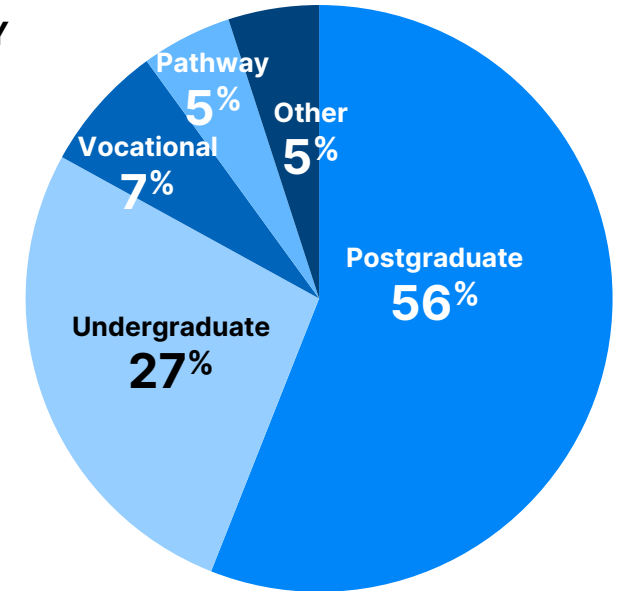
Student respondent profile

6,000+ respondents from across the globe

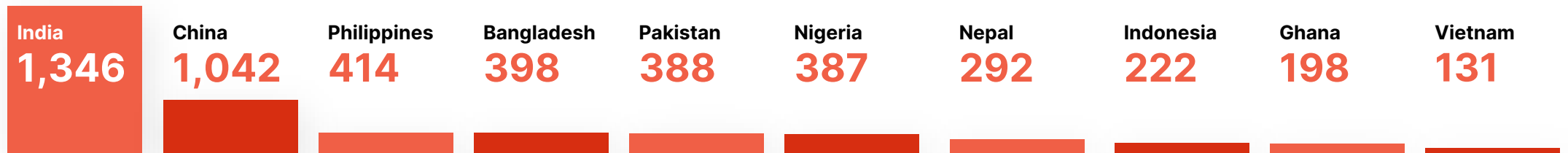
STUDY STATUS



STUDY LEVEL

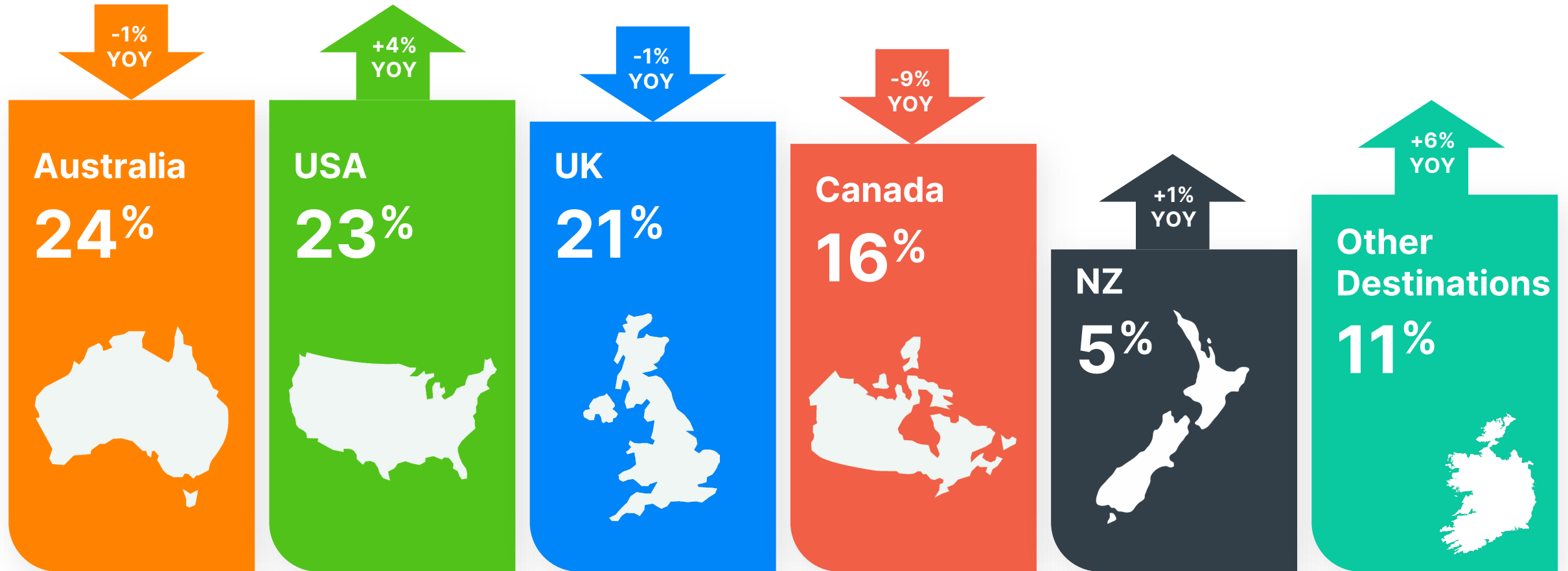


TOP 10 SOURCE MARKETS



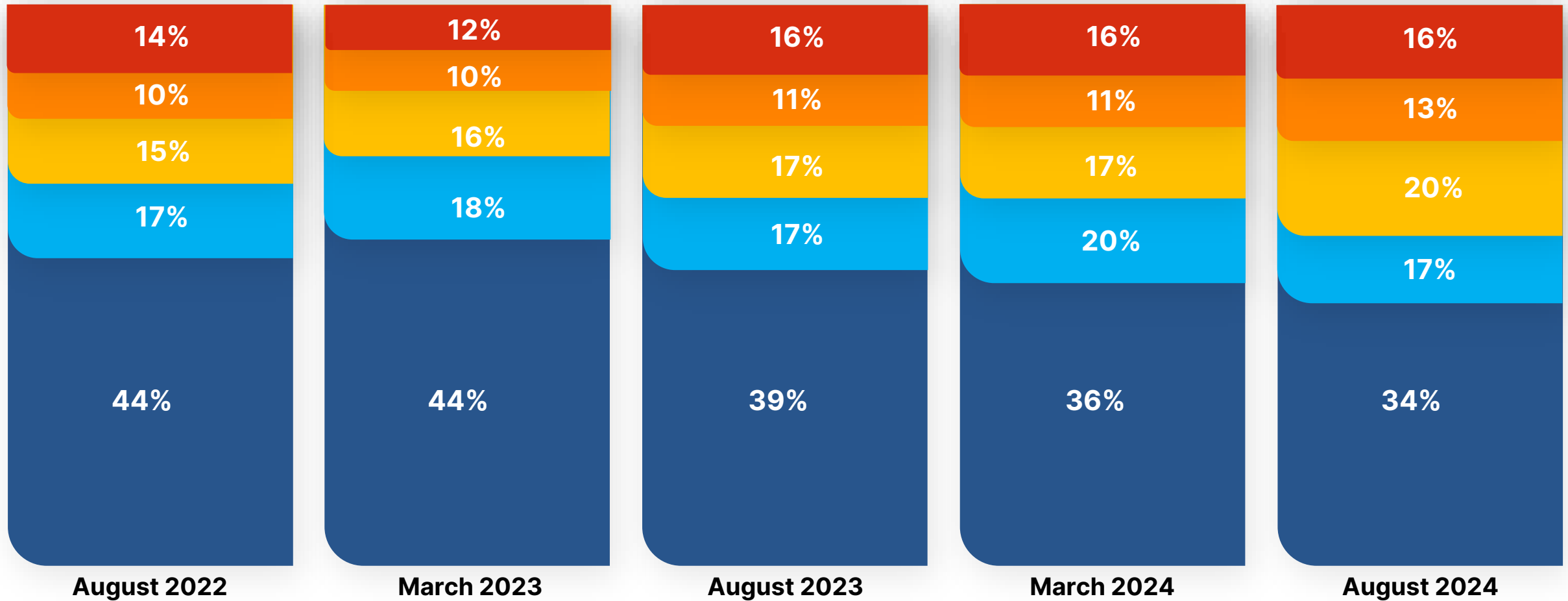
Global policy changes affecting student choice

Australia and the US overtake Canada as the preferred destination of choice while caps continue to stay in place in Canada and new caps are proposed in Australia.



Number of destinations considered globally

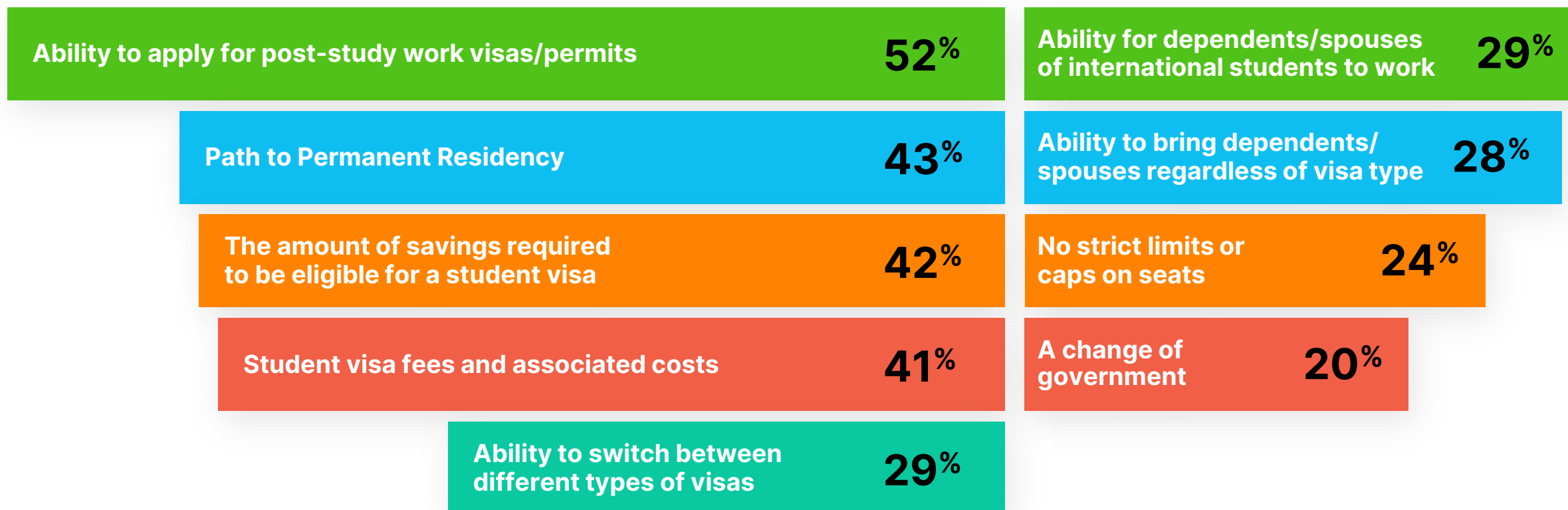
Globally, 66% of respondents are considering more than one destination to study in or receive their international qualification from; the most in recent years



Visas and fees are top of mind when choosing where to study

To what extent would/has each of the following influence(d) your choice of study destination:

Strong influence



Students are willing to change for more opportunities

Would you be willing to change your preferred **study destination** if this change meant you could:

Be able to apply for post-study work visas/ permits

62%



Have a lower amount of savings required to be eligible for a student visa

58%



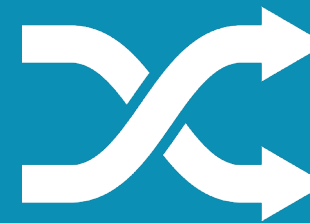
Have cheaper student visa fees and associated costs (such as health insurance)

57%



Have the ability to switch between different types of visas, including tourism, work and study visas

54%



Have the opportunity for your dependents/ spouse to work

48%



How do students feel about changing global policies?

“The unpredictability of visa policies really adds pressure, making it quite hard to navigate studying.”

Student, Philippines



What challenges do parents have to support their student?

“The biggest challenges that we face in supporting our child's international education were, of course, managing financial obligations... and uncertainties about the post-study work opportunities due to ever changing policies.”

Parent, Philippines



Decliners: Students who are no longer pursuing international study

Why are you no longer studying internationally?

The cost of tuition is now beyond my financial reach

49%



Cost of living has become too expensive

35%



Student visa cost has become too expensive

35%



It is too difficult getting a student visa

29%



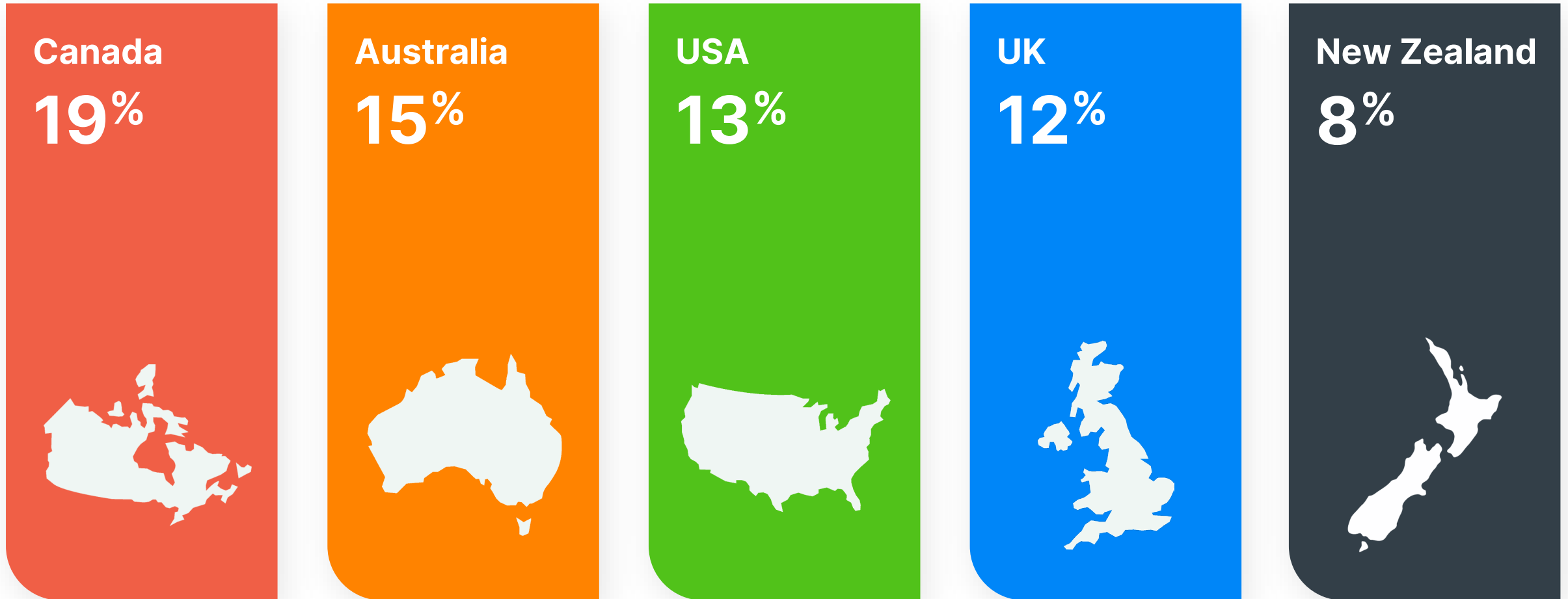
Study options in my home country have become more appealing

14%



Decliners: From where?

Students who indicated they withdrew or are no longer studying internationally



Decliners: What's next?

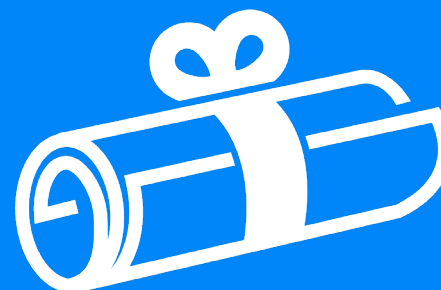
What are your study plans?

Nearly half of decliners (47%) stated they were 'highly likely' to apply for international study in the next two years.

Mostly from students at the PG and Vocational level of study



UG and Pathway are less likely to study internationally



Those who were initially bound for Canada and the UK stated higher likelihood compared to Australia and the US



View on student behaviors from IDP counselors

“Students are reacting negatively to recent policy changes, with many reconsidering their plans to study abroad, opting for alternate destinations like Spain or staying in the Philippines, particularly among younger students. Some are delaying their plans, waiting for a more stable and predictable policy environment.”

IDP Counselor, Philippines



Perceptions of study destinations

Student perceptions of top destinations

QUALITY OF EDUCATION



VALUE FOR MONEY



GRADUATE EMPLOYMENT OPPORTUNITIES



POST-STUDY WORK VISA POLICIES



INTERNATIONAL STUDENT POLICIES



6 LOWEST

10 HIGHEST

Why students choose their first-choice destination

High quality of education, post-study employment and safety are primary factors for students choosing their first-choice destination

1

High quality of education



2

Good employment opportunities after graduation



3

Safe country for international students



4

Availability of scholarships



5

Institutions are attractive



What challenges do students and their parents think they will face studying internationally?

“The first is safety, which can be more of a concern when there are reports of crime-related issues in the destination country.”

Student, China

“The most important thing to consider is safety, which is one of my biggest concerns as a parent and one of the most important factors to consider.”

Parent, China



Key takeaways



Key takeaways

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

International students are considering alternative destinations as their first choice

- Canada, Australia, and the UK are down year-on-year for the number of students considering them for first-choice destination; Canada has seen the biggest decline.
- The US has seen significant year-on-year growth.
- 66% of students are considering more than one destination country, indicating they are widening their options and looking for clarity of policies.
- 62% of students would change their study destination if it meant they were able to apply for post-study work visas/ permits, meaning PSW is still a top consideration for international students.

The US leads in perceptions that matter most to students

- Australia, Canada and the UK are now behind the US for perceptions of quality of education, value for money and graduate employment opportunities.
- Students' primary factors in choosing their first-choice destination are highly aligned to these factors; high quality of education, good employment opportunities and safety are still top of mind for international students globally.

Students are deciding to delay or forgo international study due to rising costs

- The top three reasons students are no longer studying internationally are financial; cost of tuition, living, and visa fees.
- Of those students who are putting their plans on hold, almost half 47% would reconsider their global study plans in the next two years.



Questions?

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