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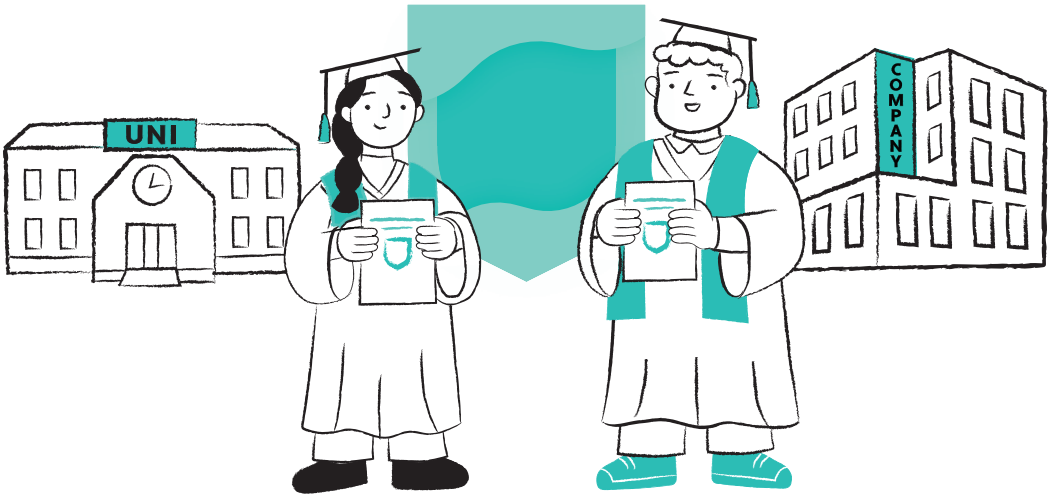


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Vice President, Partnerships & Publishing: Ross Holmes

PUBLISHER
Craig Riggs

EDITOR-IN-CHIEF
Kiley Turner

PUBLICATION DESIGN
Creative Director:
Caren Watkins
Art and Production Director:
Samantha Edwards

CONTRIBUTOR
Adriana Haytova

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ICEF GmbH
CEO: Markus Badde
Am Hofgarten 9
53113 Bonn
Germany
Tel: +49 228 201 19 0
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WELCOME



Welcome to the 2026 issue of *ICEF Insights*, our annual exploration of evolving trends and catalysts in international education.

This year, we look at the factors driving students' increasing willingness to choose alternative destinations. Several Asian and European countries offer both relatively low costs of study as well as high-quality education … and the world's students are noticing.

This is also a time when students are intensifying their focus on the return on investment (ROI) they can expect from study abroad. New research and analyses show that an expanding list of factors influence ROI, from choice of destination and programme all the way to decisions about working in the host country after graduation or returning home.

And of course: AI. ChatGPT, Perplexity, Claude, Gemini, DeepSeek, and other generative AI tools are fast becoming the preferred search platforms for high-school and college-aged students. Optimising for AI search has quickly moved from the realm of "could do's" to the list of "must do's" for international student recruitment.

As much as technology is changing the way students search for schools and universities – and how institutions and agents recruit students – it is not changing the importance of human interactions and influence. We explore the role of admissions teams and student ambassadors in creating a supportive environment for prospective students' decision-making.

Our sector is always adapting to change at some level, but the trends we've seen emerge in 2025 are now redefining the landscape of international student recruitment. As always, it is my pleasure to share the latest in marketing intelligence and best practices in *ICEF Insights*, and I hope this issue will provide ideas for the challenges and opportunities that await us in 2026.

With best wishes,

Markus Badde
CEO, ICEF

The evening reception at ICEF Canada 2025 in Vancouver.

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LALAM/DEPOSIT PHOTOS

The world's international students are increasingly from South Asia, Southeast Asia, and Africa.
Read about the implications on page 16.

In context: The changing face of international student mobility

Students from South Asia, Southeast Asia, and Africa now account for the lion's share of students in higher education abroad. What does that mean for the institutions and organisations that teach and support them?



A.C./UNSPLASH+

THE 20 YEARS between 1990 and 2010 saw a rapid expansion of student mobility. The number of students pursuing higher education credentials abroad increased by 5.4–5.9% per year, on average – a much higher rate of growth than in the previous two decades. The reason, in a word, was China.

China was the main contributor to student mobility growth from 1970 until about 2015 on the back of its roaring economy, burgeoning middle class, and massive gaps between student demand for higher education and capacity at reputable Chinese universities. These factors propelled large numbers of Chinese students abroad for many years. Most of them were self-funded, and many of them were just as likely to return home after their studies as they were to stay on in their host destination to work.

Chinese students shaped educators' understanding of international students in general. Their priorities were assumed to be foreign students' priorities ... until fairly recently.

Evolving needs

Now, students' top-of-mind concerns centre on the costs of study abroad. This manifests in several ways, including interest in work opportunities during and after study abroad, greater price sensitivity in the marketplace, and the growing popularity of affordable study destinations.

Chinese students are no exception. China's economy has cooled in recent years and its youth face historically high unemployment rates. Following the COVID-19 pandemic, Chinese families became more hesitant about study abroad, more worried about safety, and less convinced that investing in a foreign degree will provide the same benefits as it used to.

New expectations

The composition of foreign enrolment in many destinations has changed substantially over the past 10 years. There is a far greater diversity of students coming from all over the world and much greater outbound flows from South Asia and Africa.

Tens of thousands of students are now from lower-middle-income countries in which the Gross National Income (GNI) per capita is between US$1,136 and $4,495. These dynamic sending markets include Cameroon, Ghana, Nigeria, Bangladesh, Nepal, Vietnam, and at least a dozen others. In Nepal, fully one in five students now chooses to leave their country for tertiary education.

Considering the low GNI in those countries, there is an associated need among many students to work during and after studies; to carefully examine the costs of study and living in various study destinations; and to choose programmes most strongly linked to positive career outcomes.

Inside the numbers

In 2010, there were just over four million students abroad in higher education. Roughly 1.3 million – almost 31% of the total – were from China, and in that year alone, the number of Chinese outbound students surged by 24%.

That same year, there were just over 330,000 students from South Asia studying abroad, with most coming from India. The number of African students was about the same.

By 2019, the global total of international students rose to six million. Nearly three in ten (28%) were from China, but roughly as many were from key markets in South Asia – including over a million from India. Meanwhile, the number of African students abroad reached nearly half a million.

By 2024, student mobility had rebounded from the pandemic, and almost seven million students were abroad. However, a much greater range

Tens of thousands of students are now from lower-middle-income countries in which the Gross National Income (GNI) per capita is between US$1,136 and $4,495



We have entered an era in which global student flows are heavily shaped by students from key growth markets in South Asia, Africa, and Southeast Asia

of countries contributed to that outbound trend than in 2010 and 2019. The number of Chinese students dipped to just over one million (or about 14% of the total) while the number of Indian students climbed to an estimated 1.3 million, representing nearly 19% of the total in 2024. Other South Asian markets – notably Bangladesh, Nepal, Pakistan, and Sri Lanka – also registered very strong growth.

Buffeted by economic headwinds at home, the number of African students did not grow significantly in the five years between 2019 and 2024. However, given its massive college-aged population, Africa is expected to figure much more prominently in global mobility trends going forward. To highlight just one indicator of that potential, the United Nations has projected that by 2030, one of every four people on the planet aged 15–24 will live in Africa.

Implications

We have entered an era in which global student flows are heavily shaped by students from South Asia, Africa, and Southeast Asia.

This accelerating trend means that the historical understanding of international students – largely informed by the Chinese students who once greatly outnumbered students from other countries – is outdated. The reality is that the world's mobile students are more heterogeneous than ever – from varied backgrounds and with unique as well as common needs.

It is time to double down on brainstorming about how to enhance the study abroad experience for a more diverse range of students. This means creating more detailed student personas; conducting more market intelligence research; reaching out to current international students for insights; examining the range of student services on offer; prioritising integration services; tailoring the website to address concerns and aspirations in top target markets; providing better guidance on immigration rules and visas; and more. It also involves recognising that work rights, career services, and career outcomes have joined quality of education as dominant drivers of student decision-making.

The international students of today – and of the future – will be shopping the market for value and measurable outcomes more carefully than ever before. The most competitive institutions will deliver that ROI in every facet of their offer to students.

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Who moved my rankings?

World university rankings are much-anticipated signals of the state of competition in the global higher education marketplace. Year-to-year changes can be dramatic, and long-term trends are just as fascinating.



Biggest movers in the top 500

	2010		2026	
	Institutions in top 500	Share of top 500	Institutions in top 500	Share of top 500
US	**109**	**21.8%**	**71**	**14.2%**
UK	51	10.2%	46	9.2%
Germany	42	8.4%	30	6.0%
Japan	25	5.0%	13	2.6%
Australia	24	4.8%	28	5.6%
France	21	4.2%	14	2.8%
Canada	20	4.0%	18	3.6%
Italy	15	3.0%	15	3.0%
Korea	13	2.6%	13	2.6%
Netherlands	12	2.4%	13	2.6%
Spain	10	2.0%	15	3.0%
China	**10**	**2.0%**	**33**	**6.6%**
Taiwan	9	1.8%	8	1.6%
Switzerland	8	1.6%	8	1.6%
India	8	1.6%	10	2.0%

Source: QS World University Rankings 2010 and 2026

Top-ranked student cities (2025–26)

Asia is very well represented in QS's 2026 ranking of the world's top 20 student cities. Seoul and Tokyo are #1 and #2, and Singapore, Kuala Lumpur, Taipei, and Hong Kong are also in the mix. Beijing and Taipei leapt 18 and 12 spots, respectively, to enter the top 20 for the first time.







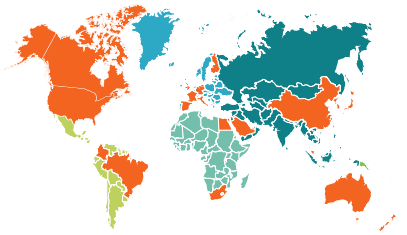
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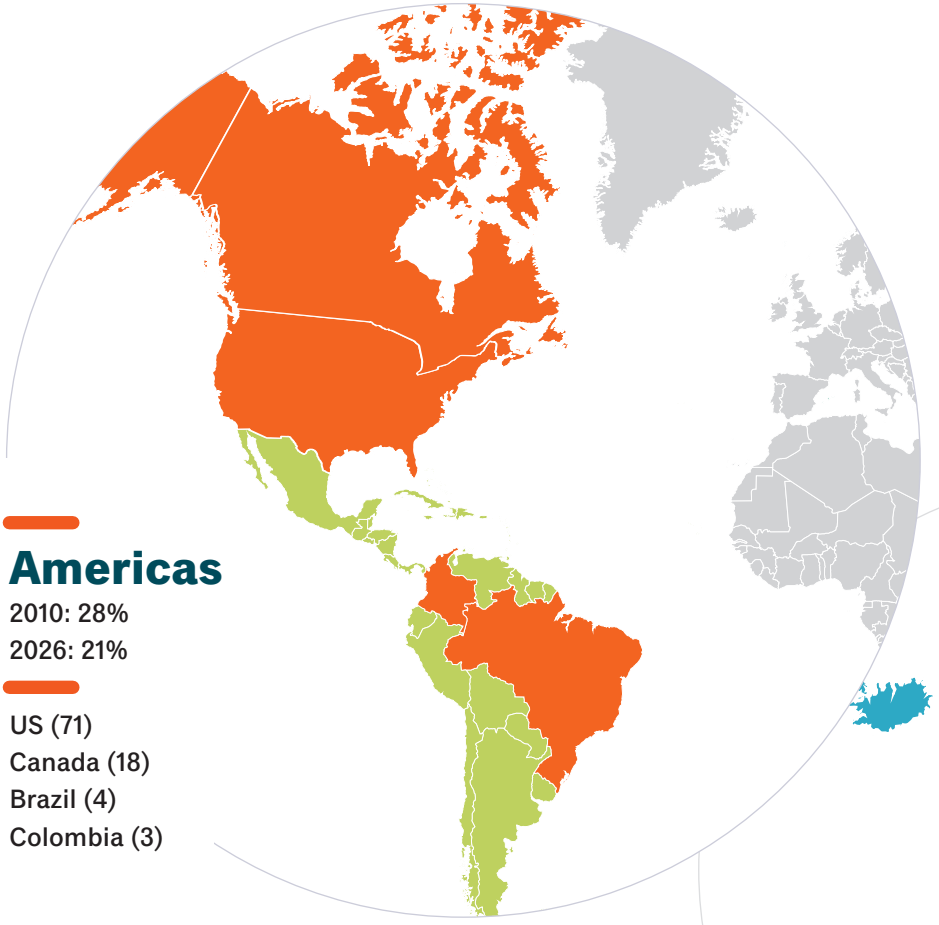
2026 ranking		Rank change since 2025
1	Seoul	+ 2
2	Tokyo	0
3	London	- 2
4	Munich	0
5	Melbourne	0
6	Sydney	0
7	Berlin	+ 2
7	Paris	0
9	Zurich	- 1
10	Vienna	+ 4
11	Singapore	+ 4
12	**Kuala Lumpur**	**+ 11**
13	**Beijing**	**+ 18**
14	**Taipei**	**+ 12**
15	Edinburgh	- 2
15	Boston	+ 1
17	Hong Kong	+ 5
18	Montreal	- 8
18	Kyoto	new
20	Amsterdam	0

Source: QS Best Student Cities Rankings 2026

Continental drift

We examined the 2010 and 2026 editions of the QS World University Rankings and found a significant shift in the global distribution of top-ranked universities. Shown here are (1) the share of the top-500-tier held by each global region (2010 vs. 2026), and (2) the countries within each region with the most top-500-ranked universities in 2026.





Americas

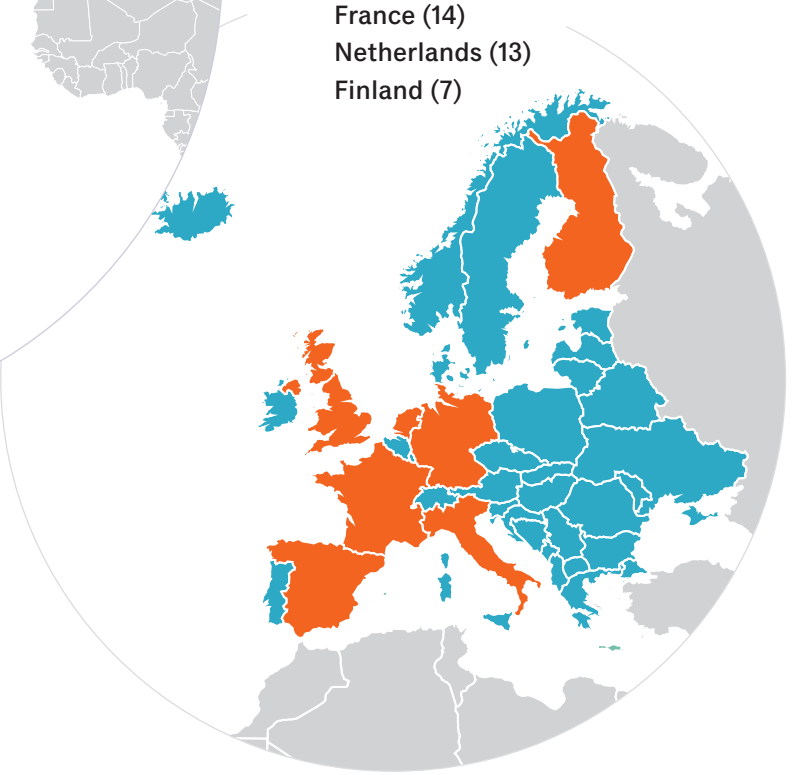
2010: 28%
2026: 21%

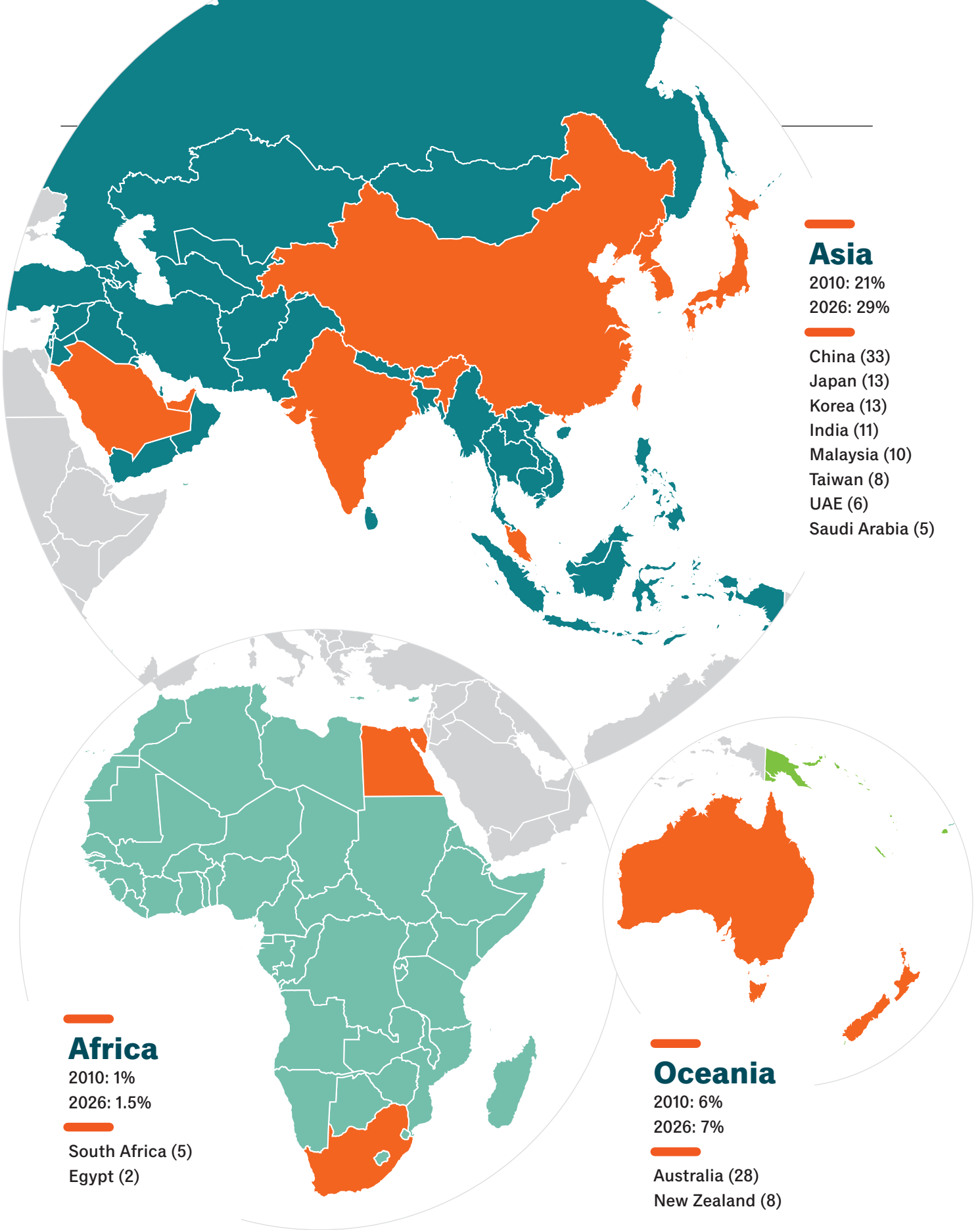
US (71)
Canada (18)
Brazil (4)
Colombia (3)

Europe

2010: 44.5%
2026: 41.5%

UK (46)
Germany (30)
Italy (15)
Spain (15)
France (14)
Netherlands (13)
Finland (7)





Asia

2010: 21%
2026: 29%

China (33)
Japan (13)
Korea (13)
India (11)
Malaysia (10)
Taiwan (8)
UAE (6)
Saudi Arabia (5)

Africa

2010: 1%
2026: 1.5%

South Africa (5)
Egypt (2)

Oceania

2010: 6%
2026: 7%

Australia (28)
New Zealand (8)

AI tools in action

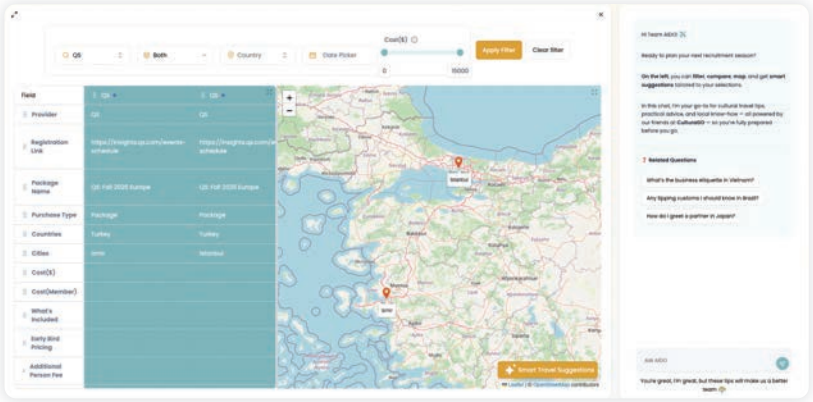
There are so many AI tools ... which ones are best? We asked colleagues to talk about the AI tools they consider indispensable for international student recruitment.

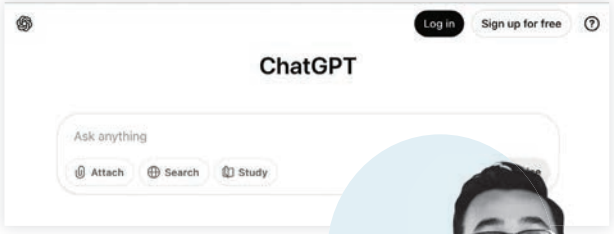


Purpose-built design

If we're talking LLMs, I'd recommend Perplexity, especially now with Comet, their dedicated browser. It's great for research, cutting through SEO junk and sponsored results. But for international recruitment, AIDO takes things a step further. It's built on the Perplexity model but designed for our industry, so the data it pulls is current and from relevant IEM sources. AIDO has been crucial in helping me gather evidence and build a case for our ongoing recruitment strategies in Southeast Asia, giving me confidence that I'm working from the best information available when making important planning decisions.

Greg Holz, assistant director for global engagement, University of Central Missouri (United States)





The multi-tool

As an international ed-tech entrepreneur, the AI I consider indispensable is ChatGPT. I rely on it daily to power my work across multiple fronts: building custom GPTs tailored to different goals, managing complex tasks and projects, prototyping features, "vibe coding" quick interfaces for HTML emails, and developing proofs of concept at speed. What would normally take days of trial and error can be iterated in hours with ChatGPT as a creative and technical partner. For me, it's less a single Q/A tool and more an always-on collaborator that makes rapid innovation in AI-driven education technology possible.

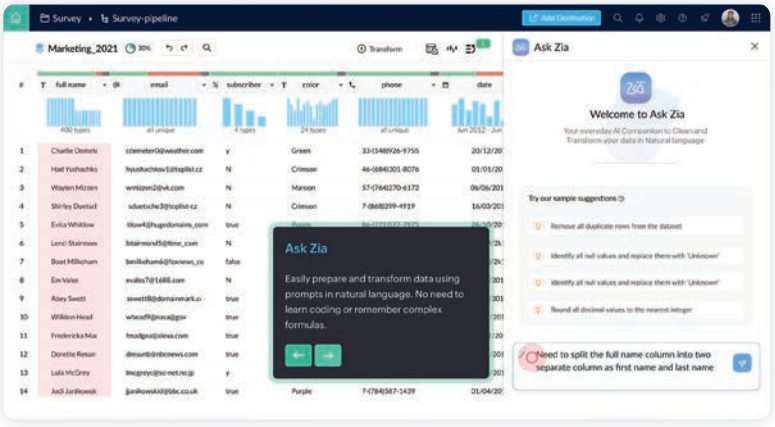
Rishab Malhotra, founder & CEO, AIDO (United States)

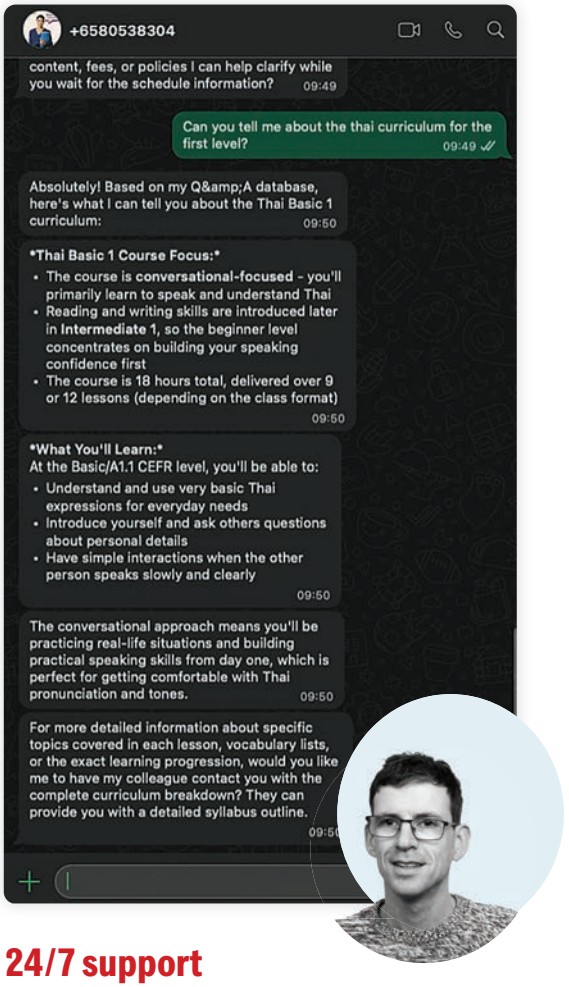


Better lead data

As a digital recruitment manager, I rely on Zoho DataPrep, an AI-powered ETL (Extract, Transform, Load) tool that transforms how we manage prospective student information from multiple platforms before importing it into our CRM system. Lead data often arrives fragmented with inconsistent formats, duplicate entries, incomplete fields, or errors. Zoho DataPrep automatically cleans, validates, and standardises this information, then integrates it into our CRM, ensuring accurate reporting and enabling timely engagement campaigns. By eliminating these operational barriers, my team can focus on strategic digital recruitment, driving stronger student engagement and faster conversions, and saving countless hours otherwise lost to manual fixes.

Priyank Mistri, manager, digital recruitment, Centennial College (Canada)

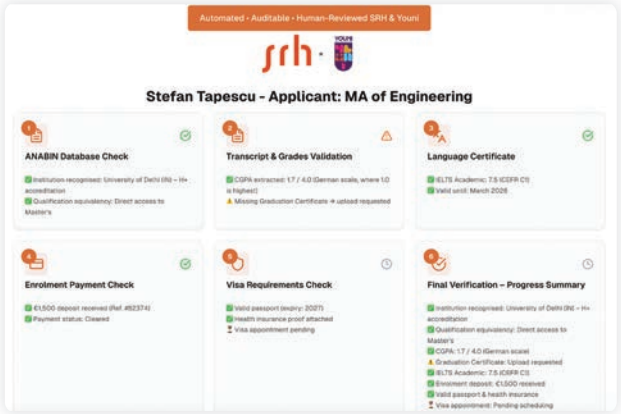




24/7 support

Expertise.ai's AI chatbot replaced live WhatsApp support for a language school I work with. It answers routine programme questions in multiple languages, 24/7, and forwards tricky cases to staff. The switch accelerated response times, smoothed applicant journeys, and freed advisors for higher-value tasks. Caveat: Any AI chatbot is only as good as its training, and it took months of training to get the bot to not just answer questions correctly, but also to sell in a consultative way.

Guus Goorts, higher education marketing consultant and author (the Netherlands)





Streamlined admissions processes

Youni's AI Admissions solution dramatically reduces HR costs while scaling international student recruitment. It automates document validation (transcripts, diplomas, language certificates, passports) with 99% accuracy in seconds, eliminating expensive and time-consuming manual processing. Our admissions team escapes tedious admin work to focus on high-value activities: candidate advising, relationship building, and strategic recruitment. Students receive fast decisions with actionable feedback, accelerating enrolment cycles. This speed advantage directly drives higher conversion rates while our staffing costs remain flat during rapid growth. Scale smart, not hard.

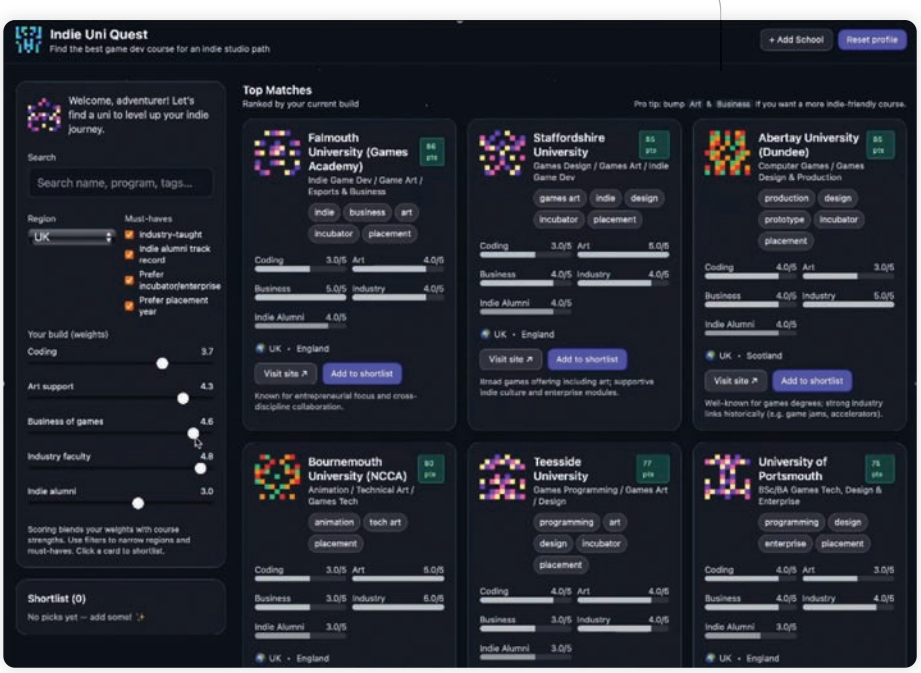
Oana Lelcu, global sales and marketing director, SRH Universities (Germany)



A new way to search

As an education marketer, my go-to is ChatGPT-5, not for content creation or data analysis, but for how quickly it can build digital tools. Recently, I pretended I was going to uni for the first time and was interested in game development, with aspirations to run my own indie studio (a boy can dream). I asked ChatGPT-5 to build me a tool that "helps me discover the right choice for me." And it did. Within 10 minutes, I had an app that indexed gaming institutions across the world, where I could customise my "fit" preferences and dynamically sort results. Tell me that doesn't change the face of how students discover their university choices.

Kyle Campbell, founder and managing director, Education Marketer (United Kingdom)



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Market fundamentals

A country's GDP growth*, proportion of middle-class households, and youth demographics are key indicators of likely demand from that country going forward



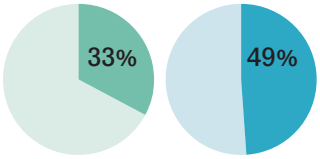
Dhaka, Bangladesh



Mount Bromo, Indonesia

Bangladesh

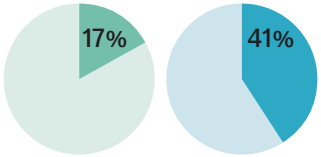
3.8% GDP growth



middle class (by 2030) | under age 24 (2025)

Indonesia

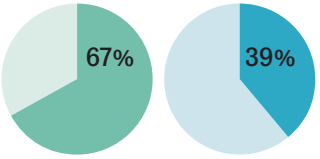
4.7% GDP growth



middle class (2024) | under age 24 (2025)

Kazakhstan

4.9% GDP growth



middle class (2021) | under age 24 (2025)

For comparison's sake

China's economy is expected to grow by 4% this year, with 40% of the population expected to be among the middle class by 2030. Nearly three in ten (29%) Chinese are aged 24 years or younger.

Meanwhile, India's GDP is expected to increase by more than 6% in 2025. Four in ten Indian households will be in the middle class by 2031 and half of the country's population is under the age of 24.

*GDP growth as projected for 2025 by the International Monetary Fund

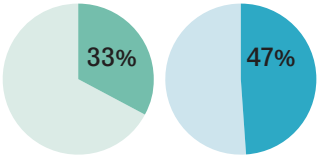
ATIK SULIANAMI, HASNAN MONIR, PAUL MACALLAN, RAIMOND KLAVINS, ASHIM D'SILVA/UNSPLASH



Bhaktapur, Nepal

Nepal

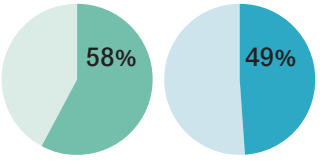
4% GDP growth



middle class (2024) | under age 24 (2025)

Egypt

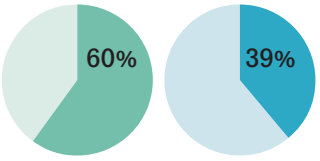
3.8% GDP growth



middle class (2025) | under age 24 (2025)

Vietnam

5.2% GDP growth



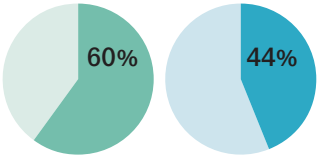
middle class (by 2030) | under age 24 (2025)



Marrakesh, Morocco

Morocco

3.9% GDP growth



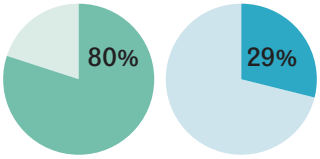
middle class (2024) | under age 24 (2025)



Dubai, UAE

UAE

4% GDP growth



middle class (2024) | under age 24 (2025)

Facts & Figures

Stats that provide fascinating insights into our industry right now



GRAFICON STUFF/ UNSPLASH+

2028

Digital marketing firm Semrush predicts that AI-powered search traffic will surpass organic search traffic by 2028 – or much sooner if Google makes AI Mode its default search experience (Source: Semrush).

3x

The number of internationally mobile students in higher education more than tripled between 2000 and 2022, from 2.1 million to 6.9 million (Source: UNESCO).

21%

Foreign enrolment in Japan grew by 21% between 2023 and 2024 to 336,710 – higher than Japan's pre-COVID high point (Source: JASSO).

7.6 million

English-language training providers in the eight major ELT destinations – Australia, Canada, Ireland, Malta, New Zealand, South Africa, the UK, and the US – collectively delivered 7.6 million student weeks in 2024. This represents a -10% decline from 2023 (Source: BONARD).

8x

Research has found that the revenue contribution of international students in Germany is about 8x greater than the cost to the public of hosting those students (Source: Research by the German Economic Institute for DAAD).

5%

All education institutions licensed by the UK's Home Office to sponsor international students for visas must now maintain a visa refusal rate for applicants of less than 5% or risk losing their license (Source: UK Home Office).

More than half

In 2025, 58% of mystery shoppers submitting queries to institutions said they received an "excellent" response – up from a third saying that the previous year (Source: Edified's 2025 Enquiry Experience Tracker).

26%

One-quarter of students responding to Etio's 2025 International Student Barometer survey said they use AI tools daily (Source: Etio).

320,000

Taiwan has expanded its international recruitment target with a goal to attract 320,000 foreign students by 2030 (Source: Taiwan's Ministry of Education).

58%

When asked what they value most when contacting a university, 58% of surveyed prospective students said the quality of support they receive matters most (Source: IDP).

8 million

China has announced a goal to expand transnational education (TNE) enrolments from an estimated 800,000 students currently to 8 million in the future (Source: China's Ministry of Education).

-48%

Between 2023 and 2024, the number of new study permits issued by Canada declined by -48% due to more restrictive policy settings introduced from January 2024 on and by a related increase in rejection rates (Source: IRCC).

14,830

The number of international K-12 schools grew by 8% between January 2024 and January 2025 to reach 14,830 schools with a combined enrolment of 7.4 million students (Source: ISC Research).

90%

Student searches for UAE rose 90% in June 2025 compared with June 2024, driven by demand from India (Source: Studyportals).

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The new strategic imperatives for internationalisation and recruitment

International higher education is entering a decisive new phase. Recruitment flows remain important, but they no longer define the sector on their own. Increasing regulatory oversight, shifting visa requirements, and growing demands for compliance and sustainability now shape mobility as much as demand itself. At the same time, transnational education has moved from the margins to the mainstream, creating new models of delivery and expanding access across borders.

In this evolving environment, students expect transparency and reliable outcomes, while universities are focused on building durable strategies that balance global reach with academic integrity and long-term resilience.

Who we are

InUni is a division of Global University Systems (GUS), one of the world's largest and most internationally connected education groups. Educating more than 100,000 students across multiple institutions and regions, GUS combines global scale with local presence, enabling it to operate at a level few in the sector can match.

For InUni, being embedded within such a network is transformative. It allows access to shared intelligence drawn from a global student body, established infrastructure in key markets, and proven systems that connect strategy across borders. GUS's scale ensures that InUni is not simply a facilitator of mobility, but also a partner capable of helping institutions build international capacity with confidence, resilience, and long-term vision.

Supporting universities beyond recruitment

For universities, internationalisation can no longer be reduced to enrolment numbers. Lasting progress depends on embedding global engagement within institutional strategy. This means aligning recruitment with curriculum, ensuring that mobility pathways are compliant with shifting regulatory environments, diversifying student markets to strengthen resilience, and providing support that extends beyond admission to long-term student success.

InUni supports this process by acting as an extension of the university. Drawing on its sector expertise and the global reach of GUS, it helps institutions to design and deliver transnational education pathways that are both academically rigorous and operationally sustainable. These pathways include structured progressions that allow students to begin their studies in one location and complete them in another, the establishment of joint and dual degrees, and the design of hybrid or blended delivery programmes.



The mission of InUni is to ensure that internationalisation is not pursued as a short-term numbers exercise, but as a sustainable framework aligned with academic priorities and larger institutional goals. In line with this mission, InUni is building collaborations with institutions such as the University of Akron and Avila University. These partnerships illustrate how universities are exploring new ways to align recruitment with long-term planning, and how pathways can be developed to strengthen institutional presence and resilience in a rapidly changing global environment.

Sponsored by

The next chapter of international higher education will be defined by those who look beyond recruitment metrics and embrace strategic internationalisation.

www.inuniglobal.com

Strengthening recruitment partnerships

Partnerships with education agents remain central to global student movement. They provide reach into diverse markets and often represent the first point of engagement with students.

InUni works with recruitment partners not as intermediaries but as long-term collaborators. By providing access to a diverse portfolio of respected universities in the United States, United Kingdom, Europe, and beyond, InUni ensures that student choice is grounded in quality and student fit. Within the InUni network, professional training supports equip counsellors and managers to deliver accurate advice, while transparent admissions and compliance frameworks reinforce trust at every stage of the process.

Strategic global partnerships

The next chapter of international higher education will be defined by those who look beyond recruitment metrics to embrace strategic internationalisation. This requires resilient partnerships, embedded transnational delivery, and student success as the ultimate measure of progress.

InUni stands at this intersection. Its model is designed to add value to institutional efforts for sustainable international recruitment. By operating as an extension of the institution, InUni helps to build capacity step by step – through market intelligence, compliance support, curriculum alignment, and student services – ensuring that international strategies are implemented with continuity and care.



From left to right: Denver Muirhead, Director of Strategic Operations and Growth, InUni; David Fisher, Chairman of InUni; Dr Fanta Aw, CEO of NAFSA; and Angel Ahmed, Strategic Development Consultant, InUni/GUS

"Our collaboration with InUni reflects a shared commitment to building international pathways that align with long-term institutional priorities. Rather than focusing only on recruitment outcomes, the emphasis is on sustainable growth that strengthens the university's global presence." —**The University of Akron**

"Internationalisation requires partners who understand both compliance and academic integrity. InUni brings expertise and perspective that support our efforts to design pathways connecting global demand with our institutional capacity in a responsible way." —**Avila University**

"Our approach to global engagement is rooted in careful planning, collaboration and partnership. InUni's model complements this by providing structured, step-by-step support that allows us to strengthen our reach without compromising quality or sustainability, working side by side with the University to drive forward our recruitment agenda." —**Canterbury Christ Church University**

"My visit with GUS and InUni Global was both informative and inspiring. I was particularly impressed by the breadth and depth of initiatives being advanced under the GUS umbrella." —**Dr Fanta Aw, CEO of NAFSA: Association of International Educators**



RIZKI ARDIA/UNSPLASH+

The want list

How do students decide where and what to study? The answer, more than ever, has to do with costs of study, return on investment, and expected outcomes.

More than seven million students are currently enrolled in higher education abroad. This number has more than tripled since the turn of the century, and it is expected to reach nine million by 2030.

Underlying this growth are different circumstances than in the past, including a changed student mindset about the value of education.

To be more concrete, let us put ourselves in the shoes of just one person: an upper secondary student in Vietnam. She is set to graduate next year and hopes to go abroad for university studies. Over the next few months, she talks with her parents and friends; spends hours online researching programmes, institutions, and destinations; and chats with student ambassadors and alumni on social channels. She attends meetings with her school counsellor and visits a local education agency as well. In no time, she has a longlist of potential countries, cities, universities, and programmes.

But now what? How does she narrow the field of options? What motivates her to apply to one institution versus another? These are the questions that determine the shape of international student mobility.

The want list is longer now

Traditionally, students have prioritised goals such as international and intercultural experience, foreign language acquisition, and the prestige of a degree from a particular institution.

These goals remain influential. However, they are now often secondary to financial considerations and value for money. Global surveys by IDP, Etio, QS, Keystone, and Studyportals find that top concerns centre on cost of living, cost of studying, scholarships, work opportunities, and graduate outcomes, which are all linked to an emphasis on affordability and return on investment (ROI).

It isn't that these concerns are new. Rather, what is important here is that affordability and ROI have risen significantly as factors that affect where in the world students decide to study, and in which programmes.

In some respects, this greater focus on ROI is changing the value proposition for study abroad. It affects, for instance, how students evaluate quality of education. For example, IDP's Emerging Futures 7 survey conducted in March 2025 found that students increasingly equate quality of education with graduate outcomes.

Other indicators of quality – such as rankings – are still important.

But IDP's findings underline that students are looking beyond traditional indicators to ask, "What can I really expect?" "What am I going to get from this experience?" "What will this mean for my future prospects?"

The rise of more affordable destinations

The quest for affordability is a primary reason for the growing interest in destinations other than the "Big Four" (i.e., United States, United Kingdom, Canada, and Australia).

As the Big Four have introduced more restrictive immigration policies, other countries – especially in Europe and Asia – have opened wide their doors. And it just so happens that many of these countries offer relatively low costs of study and living.

The table on page 41 provides a summary of undergraduate fees and accommodation costs in selected destinations, and it illustrates significant price gaps across the international education market.

We should note that costs for an individual student may still vary quite a bit within a given destination. Some fields of study are more pricey than others, smaller towns and cities are less expensive than major urban centres, and some students will have scholarships or other financial support from their host institution/country or home country. But the table's broad comparisons reveal the wide spectrum of choice available to students with various budgets.

Multiple factors affect ROI

Costs of study and living are only part of what students consider when evaluating where to put their investment in study abroad. Students also look at available scholarships, the number of hours per week they can work while in their programmes, and the length of time they can work in a destination after graduation.

A recent analysis by INTO University Partnerships shows that beyond programme and institution choice, students' post-study decisions – e.g., whether to emigrate, work for a couple of years in the destination country after graduation, or return home immediately – bear considerably on the time it takes to "earn back" the cost of an overseas education.

An undergraduate student from China, for example, who studies at a Go8 institution in Australia could expect it to take 3.5 years to recover study costs if they remained in Australia, 6 years if they worked for a couple of years before returning home, and 9.5 years if they went straight home after graduation. But for an Indian student enrolled in



What is driving price sensitivity?

Macroeconomic trends such as trade wars, conflicts, and global warming-induced calamities such as droughts and flooding have a wide geographical and financial impact. Consumers in both advanced and emerging markets are experiencing the effects of these global events. Inflation, rising food and housing costs, and rapidly changing labour markets are among the factors that impinge upon families' disposable income. In addition, a larger proportion of international students now come from countries in South Asia, Southeast Asia, and Africa – where affordability is a pressing issue (see page 16 for more on this).

What worries you most about studying in a different country?

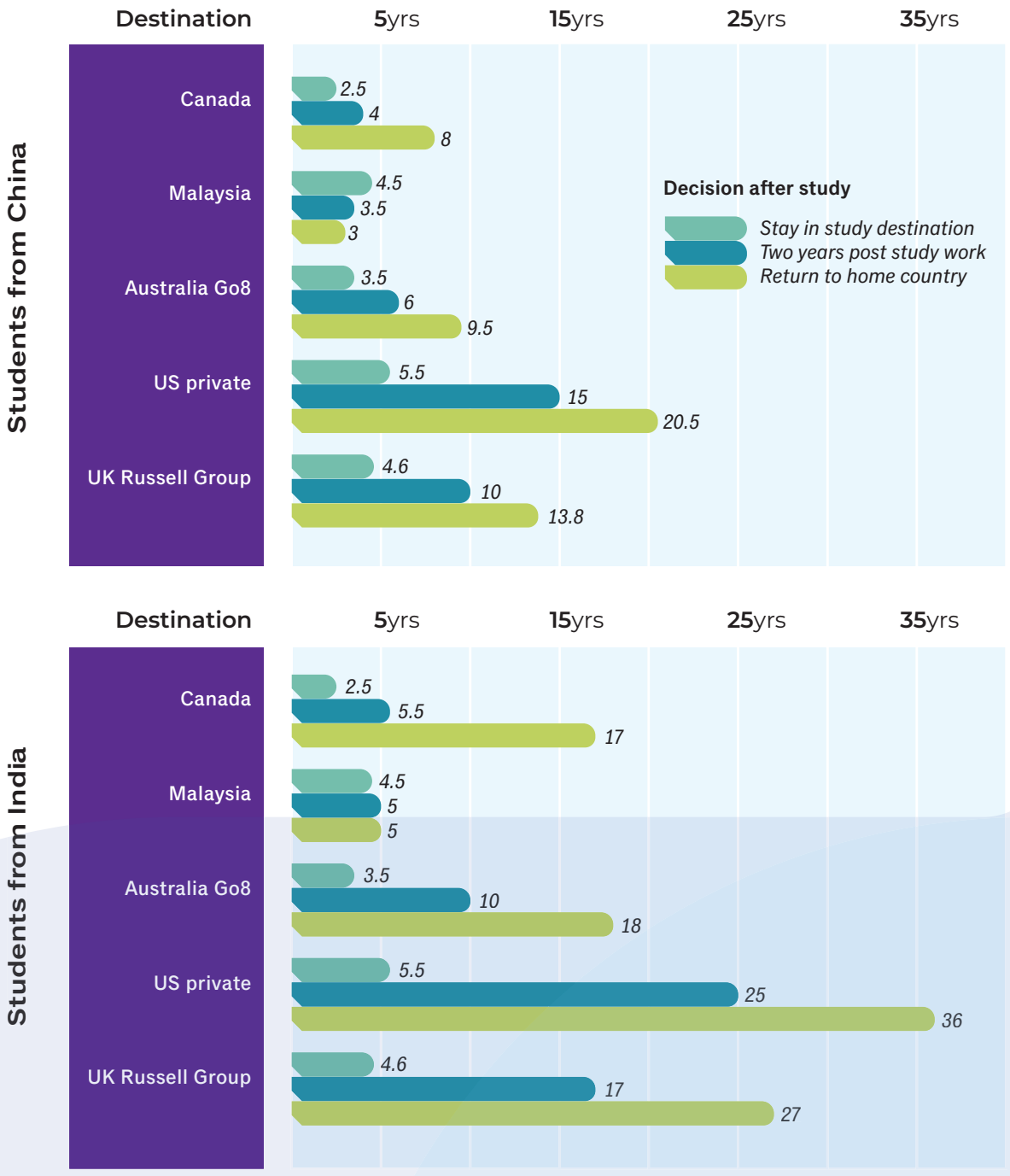


SOURCE: QS INTERNATIONAL STUDENT SURVEY 2025

A key factor influencing international student mobility is the value that students, families, and especially employers place on a foreign university degree


Students say these are the most important indicators of high-quality education
1 Graduate employment rate
2 Institution ranking
3 Facilities available to students
4 Quality of academic staff
5 Cost of tuition fees
SOURCE: EMERGING FUTURES 7, IDP

Years to earn back the cost of study abroad*



SOURCE: INTO UNIVERSITY PARTNERSHIPS

*Undergraduate

Tuition and accommodation costs across 12 destinations



	Undergraduate tuition*	On-campus accommodation*
United Kingdom	$32,000–$83,000	$12,000–$18,000
United States	$32,000–$80,000	$12,000–$16,000
Australia	$23,000–$42,000	$7,200–$12,000
Canada	$18,000–$52,000	$7,000–$14,000
China	$3,500–$9,500	$2,000–$4,000
New Zealand	$16,000–$24,000	$7,000–$12,000
Singapore	$13,000–$51,000	$2,000–$6,000
Germany	$300–$21,000	$4,000–$12,000
France	$200–$3,000	$5,000–$12,000
Italy	$1,000–$21,000	$3,000–$9,000
Japan	$5,000–$15,000	$10,000–$15,000
South Korea	$4,500–$12,000	$7,000–$10,000

*$US

As the Big Four have introduced more restrictive immigration policies, other countries – especially in Europe and Asia – have opened wide their doors

The value of foreign credentials tends to fall when there is an increase in the number of foreign degree holders in the country. It also tends to decline when the quality of the domestic higher education system improves.



that same Go8 university, it would take much longer to recover the cost of study unless they remained in Australia for good after completing their programme. In fact, it could take 18 years if they returned to India immediately after graduation, in part because the salaries afforded by the Indian labour market are often lower than in China.

Even across the two countries of origin and the five study options outlined on page 40 and 41, there is a tremendous range in that earn-back period. Now extend that to more countries of origin and destinations, and you get a sense of the complexity of decision-making facing students today.

INTO's model also underlines the high stakes associated with a student's choice of where and how they study. Their decision has serious implications for their future prosperity and wellbeing.

The foreign degree premium

A key factor influencing international student mobility is the value that students, families, and especially employers place on a foreign university degree. This value is in itself integral to the calculus of the expected ROI from study abroad.

Several determinants affect the premium linked to foreign credentials versus degrees earned at home. The weight given to each may vary according to the student's home country. For example, if the student's domestic higher education system is seen to be of poor quality and incapable of improving career prospects, then a foreign degree will carry more of a premium. Similarly, if the domestic higher education system has limited capacity and cannot produce enough skilled graduates for a growing economy, there is an aspect of scarcity that enhances the competitiveness of degree holders generally and graduates of foreign institutions in particular.

This premium, however, is not in a steady state. The value of foreign credentials tends to fall if there is an increase in the number of foreign degree holders (which erodes the scarcity premium). It also tends to decline when the quality of the domestic higher education system improves (which narrows the "quality gap" between foreign and domestic credentials).

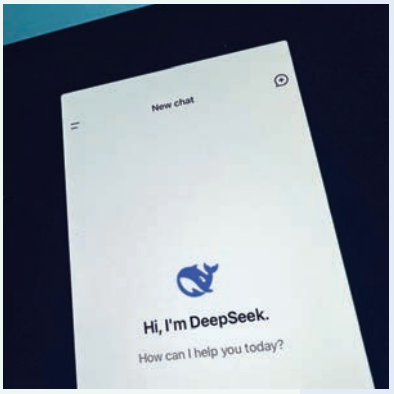
The example of China

From the late 1990s through the 2020s, capacity and quality in the Chinese higher education system grew at an unprecedented rate (read more about this on page 20). Over roughly 30 years, gross enrolment rates rose from below 10% in 1998 to above 60% as of 2024. Chinese tertiary institutions enrolled approximately 50 million students in 2024, making China the largest higher education system in the world.

Years from now, when we try to pinpoint when the ground really shifted in China regarding the value of foreign degrees, we might think of the Chinese artificial intelligence (AI) company DeepSeek. Not only did DeepSeek develop large language models (LLMs) considered to be highly competitive with leading generative AI models (e.g., OpenAI's ChatGPT-□ and Google's Gemini), but it also put its high-grade AI product into the market at (reportedly) less than 10% of OpenAI's cost.

This arguably makes DeepSeek one of the most important and highest-profile technological advancements to come out of China for some time.

The story behind the story, however, is that there are almost no foreign graduates on the DeepSeek team. Every single member of the team completed their undergraduate degree in China, and of the 24 postgraduate degrees held by DeepSeek team members, only two were earned outside China. "This would not have been the case 10 years ago," says Matt Durnin, a consultant in higher education and principal at Nous Group. "Go into a large or influential Chinese technology firm and you would've at that time seen many more 'sea turtles' (i.e., foreign-trained returnees). They're less valued and less emphasised in key industries than they used to be."



This doesn't mean that there are no longer opportunities for foreign universities to recruit in China. Far from it. But it does mean that Chinese students now assess the value of foreign degrees differently than they did even 10 years ago.

The example of China illustrates that the perceived value of a foreign qualification can change over time. Most importantly, it suggests that for an institution or programme to retain its premium, it must deliver outstanding student outcomes.

A crucial question for institutions and schools is how best to address students' need for solid career outcomes throughout the recruitment process



Starting with outcomes

Studyportals' 2025 Global Student Satisfaction Awards, produced in partnership with Uni-Life and IELTS, tracks international student satisfaction based entirely on student reviews. This year's awards are based on 102,000 reviews of 3,059 universities and 124 countries.

In the 2025 edition of the awards, students were notably more satisfied than in 2021 with the career services offered by their institution. In fact, "career development" was the most-improved category in the award programme. This suggests that educators are giving more attention to student outcomes ... and students are noticing.

This is an encouraging signal that international education practice is evolving alongside an increasingly complex and highly competitive marketplace. What's more, promoting great student outcomes is an opportunity that is within reach for virtually any institution.

It happens as well that our understanding of career services – especially when and how they are provided and the value that they represent for students – is changing quite a bit. The range of services will vary from institution to institution, but it typically includes career readiness workshops, assistance in interview preparation and resume writing, counselling, networking events with employers, internships, and job fairs.

A crucial question for institutions is how best to provide solid career services before, during, and after studies to students from around the world. A one-size-fits-all approach cannot accommodate the reality that there is a huge range of international student profiles.

At the ICEF Monitor Global Summit held in London in September 2025, presenters and attendees discussed this very question. "Everybody's starting point is different," said Virtual Internships co-founder Ed Holroyd Pearce. "Students have unique cultural backgrounds and aspirations in terms of staying on in their study destination or returning to their home country."

By extension, the design of career services should consider target recruitment countries, the current composition of the international student body, and employer needs in domestic and global labour markets.

Sanam Arora is the chair of the National Indian Students and Alumni





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If a student has offers from multiple universities, they are most likely to narrow their focus to the one that best highlights post-graduation outcomes



Union (NISAU) in the UK, and at the ICEF Monitor conference, she emphasised the place that career outcomes have in the hierarchy of student decision-making inputs: "Seventy percent of Indians choose a destination of study on the basis of overall employability, and they have historically seen the UK or US in particular as a launchpad for global careers. In that sense, the definition of what it means to be educated has fundamentally changed. Universities that realise they're not just here to educate, they're here to be that global talent launchpad, will really ace this going forward."

She continues: "Before I graduate, I want the university to help me prepare for a successful life. That is what I think of when I think of career services, because success in a career is not that different than success in life. Sometimes career services is seen as something that is off to the side or in a corner, but really it needs to be embedded end-to-end throughout the entire student life cycle."

A longer window to offer career supports

Career services used to be introduced as a transition support for soon-to-be-graduates. Now, the window for career supports might begin even before the student has an admissions offer. For example, an institution might send information to applicants (or even pre-applicants) about internship programmes, and it might also offer pre-admission courses or career-readiness training.

At City St George's, University of London, career services begin as soon as a student has received an admissions offer. The prospective student with the admissions offer may not convert into an enrolment for months, but the university recognises the competitive edge gained from giving that student access to career services right as they are choosing where to study.

Offering career supports at the pre-enrolment stage engages students in the areas they value most, and it draws them to a decision more quickly. If a student has offers from multiple universities, they are most likely to narrow their focus to the one that best highlights post-graduation outcomes.

What's more, students who have received career-based information

before they enrol are more likely to arrive on campus feeling positive, prepared, and informed.

Career services can also extend beyond the last day of a study programme. The University of Southampton, for example, provides career supports up to five years after graduation. The University of Edinburgh takes the idea even further by offering lifelong career support to alumni through a Career Services and Alumni Services platform that includes access to online resources and advice, career events, networking opportunities, and individual counselling support.

Accommodating students' timelines

As we know, post-study work rights are generally contingent on the type and length of a programme. Let us say that a student is coming for a one-year graduate programme and wants to stay on and work after graduation. With such a short window, preparation and logistical planning for work after study necessarily needs to begin before the student arrives on campus.

NISAU's Sanam Arora elaborates: "Say I am among the 7 in 10 Indians who come to the UK for postgraduate courses, which are 9 months in length. By the time I arrive for orientation, almost all the graduate deadlines have already passed for getting into investment banks, law firms, etc. So, I now am one year behind in the cycle because no one told me, 'Hey, you could have applied for this before you'd even landed in the country.' Time is of the essence, because all you have is 9 months on that course and then 18 months afterward on the Graduate Route. Every career service department should be thinking about this, right? There is so much you can do in this space when you really map out the international student journey with care."

Integrating work and learning

"More and more institutions are giving credit for work experience and any other kind of work-integrated learning," says Ed Holroyd Pearce. "Others are looking at guaranteed placement opportunities."

This might be the ultimate career support: the opportunity for students to gain professional experience in the field. Work experience is an incredibly attractive feature for students, and it resonates across the student journey, from recruitment through course progression to post-graduation.

"Eighty-five percent of our students, before they graduate, have en-

gaged in experiential learning," says Dr David Di Maria, the vice-provost for global engagement at the University of Maryland, Baltimore County. "That might be an internship, a co-op, study abroad, or research."

The problem with numbers

It is widely acknowledged that there are significant data gaps across international education. In most countries, institutions generally don't have enough information on how students are recruited; what they choose to study; how they perform in their studies; whether they graduate and how long it takes them; how often they obtain jobs linked to their programmes; and to what extent they are satisfied with their career outcomes.

This poses a significant problem for international educators who hope to develop evidence-based strategies for recruitment and retention. But lack of data is an even bigger problem for students, because data is what they want and expect when making study abroad decisions.

US institutions have an edge. "We are swimming in data," says Dr Di Maria. "We have data on everything because we're required by the US government to track what students are doing. More accurately, there's a requirement to report on the activities. There's not necessarily a requirement to report on success. But at our institution, we're tracking both. So that allows me to know that 93% of our graduates are employed and/or pursuing further education within six months [of graduation]. We know the salaries. We know that about 60% of our students interned first at the company where they are now employed. We know 75% of our graduates stay in Maryland and 83% in the Capital Region (Washington, D.C., Maryland, and Virginia)."

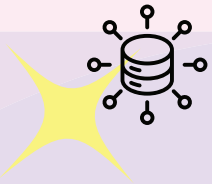
Any of us reading those proof points knows how compelling they are for prospective students, current students, alumni, institutions, employers, and parents alike.

This brings us full circle to where we started. If career outcomes are the top priority for international students, it follows that institutions should prioritise outcomes in recruitment strategies, programmes, and services. Collecting better data on student success and graduation will go a long way towards achieving that alignment ... and towards giving students what they want.

What data can be captured to demonstrate outcomes?

The list is endless, but it can include:

- Placement rates for work-integrated learning
- Career outcomes after graduation
- Salary levels for entry-level jobs
- Salary outcomes over time





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The first stage of student satisfaction

Don't miss out on a powerful opportunity to impress potential students



XIXINXING/ISTOCKPHOTO

The international student experience begins long before students arrive in a new country and walk on to campus. It takes shape when the student is still far away and considering a shortlist of schools. Institutions that provide stellar encouragement and support during this period are building trust and satisfaction even before students are enrolled.

Brand image is built over multiple touchpoints

If you have ever bought a pair of jeans, a digital device, or any other product online, you know how rewarding it is when a brand creates anticipation and excitement before your purchase. You know the satisfaction of getting an immediate response to your questions and reassurance that should you need to make a return, there is a fair process for doing so.

Once you've made your purchase, you look for email updates on your order, estimated delivery dates, tracking information, and notifications about any delays. You grow more eager when you go to your inbox and there's a message with an anticipatory subject line, e.g., "Your stunning new jeans are on their way!"

When the package arrives, you are delighted to see your

purchase wrapped beautifully in tissue paper, contained in a sleek, branded box, or accompanied by a personalised note. In fact, "unboxing" videos – where purchasers ooh and ahh as they open their packages – are so popular that they often go viral on social channels. They are also perfect examples of the power of word-of-mouth marketing.

Clearly, a great deal of brand engagement happens before consumers ever try on or try out their purchase. Online brands that provide great service and communications before and directly after a purchase encourage a positive consumer mindset that inspires satisfaction right from the get-go.

Jeans and headsets are one thing. Study abroad is another – and it is much, much more of an investment. Yet many schools miss the opportunity to deliver gold-standard service to prospects still deciding where to go and to keep inspiring confidence after students have applied.

Study abroad begins at home

When designing pre-enrolment student support,

Student ambassadors can help

Ask student ambassadors to reach out to students feeling anxious – they can reassure them, share their own experiences of long waits, and relieve feelings of isolation.

When a student receives a visa approval, send an email expressing you thrilled you are to welcome them to the campus family.



The screenshot above is from a great YouTube video called "Navigating Visa Delays: Update & Advice for International Students," by McRay Sogah. Mr Sogah explains to viewers that he, too, once waited nervously about the status of his visa, and he offers tips for students in the same situation. As of this writing, the video had 1.6K views.



ALEKSANDAR NAKIC/ISTOCKPHOTO

Parents care deeply about their children's happiness and safety and generally make the financial investment in study abroad

imagine a prospect sitting in a living room chatting with family and friends about institutions on their shortlist. Parents are naturally worried and determined to make a good choice. After all, they care deeply about their children's happiness and safety and often make the financial investment in study abroad. Friends may also be considering foreign schools or universities, and so there is vigorous debate about the pros and cons of various options.

That living-room discussion touches on all the typical considerations: rankings, affordability, quality, location, visas, programmes, work opportunities, possible scholarships, etc. But also: Which institutions have great websites? Which institutions make it easy for students to contact them?

You can imagine parents poring over emails from institutions to compare pros and cons. And they aren't just looking for information. They notice if the tone is professional and friendly, and they notice when an admissions staff member offers to talk personally to them about a programme. They like impressive percentages about post-graduation employment rates. If parents aren't proficient in English or another language of study, they appreciate an offer to have information and answers translated into their first language – which is becoming much easier to do with AI tools, and which is just beginning to happen at some institutions.

Students, meanwhile, look for prompts to speak with student ambassadors (see more on page 75), offers to connect with the career services team, and housing assistance. They like links leading to virtual tours of campus facilities and "day-in-the-life" videos of students having fun at orientation and graduation ceremonies, attending lectures, enjoying meals with friends, and interacting with industry professionals as part of their programme.

If those students and parents were looking at communications from your school or university, would they be impressed? Would your email and

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website strategies truly represent what it is like to study on your campus? If not, it's time for a review and rethink.

Keep it going

Congratulations! The prospect you've been handling with great care has decided to apply! Ahh, all that effort was worth it. But that's not where it ends.

Kasper Baars, head of university partnerships at Uni-Life, notes: "For many institutions, the post-application phase is where things go quiet. Students go dark. Engagement drops. And teams shift their focus to the next cycle. But this silent stretch is actually one of the most critical moments in the entire journey."

Mr Baars continues: "The admissions process isn't just about checking boxes and verifying documents; it's about sustaining momentum, building trust, and reassuring students that they've made the right choice."*

As students wait for a visa decision, your institution could:

- Provide one-on-one guidance about accommodation, academic expectations, study tips, course structure, reading lists, etc.;
- Guarantee late admission in the event of visa decision delays;
- Deliver virtual tutorials for students who may need language support;
- Create virtual meet-ups with other international student applicants to start creating community.

Roll out that welcome mat

When new students arrive on campus, arrange for airport greetings and transportation to ensure their first impression of your country and school is incredible. When students tuck in for bed on their first night, you can be sure they are messaging with family and friends at home and posting photos and videos before they go to sleep.

**Excerpted from the 2025 edition of the Global Student Satisfaction Awards (Studyportals/IELTS/Uni-Life)*



GETTY IMAGES/UNSPLASH

"For many institutions, the post-application phase is where things go quiet. Students go dark."

—Kasper Baars

From the Big Four to the Big Fourteen

Policy disruptions in the Big Four are heightening students' interest in alternative destinations



KATERYNA HLIZNITSOVA/UNSPLASH

Over the past few years, it has become more difficult for many students in emerging markets to study in Big Four destinations (i.e., Australia, Canada, the UK, and the US).

In response to greater levels of public concern about immigration, governments in Australia, Canada, and the UK have launched measures such as caps on new enrolments; higher financial requirements and visa application fees; a narrower band of post-study work opportunities; stricter rules around accompanying family members; higher compliance standards for institutions hosting foreign students; and more. In the US, the Trump administration's explicit actions towards both illegal and legal immigrants (including arrests, detentions, and deportations) is enough to depress demand from students who might previously have wanted to study there.

Meanwhile, it has become easier – and more compelling – for international students to study in a growing list of countries in Asia, Europe, and the Middle East.



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Destinations with high-growth recruitment goals

Country	International enrolment target	Most recent international enrolment (2024)
France	500,000 by 2027	443,000
Japan	400,000 by 2030	336,000
Kazakhstan	150,000 by 2029	31,500
Russia	500,000 by 2030	389,000
South Korea	400,000 by 2030	305,000
Taiwan	320,000 by 2030	123,200
Türkiye	500,000 by 2028	340,000
UAE	50% of total university student body by 2033	31,500

Did you know?
Big Four destinations host about 35% of the world's international students, down from roughly 40% in 2020

Demographic and economic goals

Emerging – and some established – destinations outside the Big Four have their reasons for encouraging inbound student mobility, from a need to counter the effects of ageing populations to a desire for better economic competitiveness and influence in key regions. Any or all these reasons are reflected in some of the enrolment targets we see in a growing list of countries including the ones in the table above.

Open doors are encouraging

Many of the fastest-growing destinations are the most affordable in terms of tuition fees and living costs. Some – especially in Asia – are both affordable and home to top-ranked universities, a combination that explains why there are eight Asian cities in the top 20 in QS's 2026 Top Student Cities ranking (see page 21 for more).

But there is also an emotional aspect underlying the new popularity of of alternative destinations. Students want to feel welcome and wanted in the country in which they choose to study abroad. Over the course of 2025, in conversations with top agents around the world, we have heard that several factors are making Big Four destinations feel less welcoming than in the past. These include:

- Visa application processes
- Visa requirements (e.g., around finances, dependants, language, etc.)
- Application fee increases
- Delays in visa decisions
- Visa rejection rates
- Unpredictable visa outcomes
- Frequently changing immigration rules

Visa-related challenges can feel very personal. Imagine you are a student in West Africa. You know that approval rates in Big Four destinations are relatively low but it's been your dream since childhood, and so you persevere. With your good grades, sufficient finances, strong language

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Agents take pride in knowing which students are best fits for certain institutions and which destinations are the best match for what a student wants

proficiency, and impressive extra-curricular activities, you apply. So does your friend. You wait three months for a decision, then get rejected. Your friend, with virtually the same strengths as you, hears in six weeks that she has been approved. You are given no reason – or a weak reason – for your rejection, and you cannot see why you weren't approved given that your profile is almost identical to your friend's. You cannot help but feel hurt.

This sort of occurrence is also upsetting for agents. Agents take pride in knowing which students are best fits for certain institutions and which destinations are the best match for particular students. If agents encounter persistently high levels of refusals and hurdles, not only do they feel the disappointment of individual students. They also worry that the pattern could cause stakeholders such as parents and local schools to lose faith in their abilities.

Meanwhile, both students and agents are increasingly aware of emerging destinations that are offering quality education at a low cost; asking for minimal paperwork; sweetening the pot with career supports and scholarships; and processing and approving visas quickly. As such, these destinations have become significantly more compelling – and rewarding – to apply to.

Did you know?

- The number of Asian students choosing to study within their region between 2016 and 2022 rose by 40%.
- China has introduced a flexible new "K-Visa" to attract the world's best STEM students and graduates.
- Hong Kong will allow 50% of its students to be non-local, up from 40% in 2024 and 20% before that.
- Germany's goals include seeing international students compose 15% of the student body and raising success rates of foreign students.
- France has expanded its scholarships, grants, and exemptions, especially for students from Africa.
- The Moroccan Agency for International Cooperation (AMCI) offers full scholarships to students from dozens of African, Asian, Caribbean, and Pacific countries.

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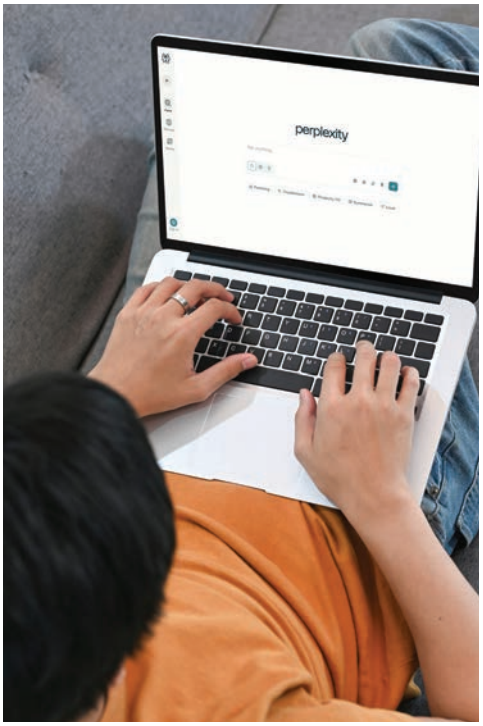
How to optimise for generative AI and empower student ambassadors



RENDY NOVANTINO/UNSPLASH

Get set for the new era of AI search

Does your institution answer prospective students' top questions? Generative AI wants to know



GETTY IMAGES/UNSPLASH

Consider this headline from a May 2025 article in *EdTech Innovation Hub:* "Universities risk digital invisibility as AI tools like ChatGPT replace Google in student search behaviour, says report." Reading that, do you feel a slight – or more dramatic – tinge of alarm? If so, you wouldn't be alone.

The headline is referencing Everspring's *2025 AI Search Trends Report*. Sure enough, the contents of that report confirm the urgency of adapting to the growing impact of generative AI on students' decisions about where and what to study.

Two-thirds prefer generative AI

The Everspring report draws on 450,000 student searches from January 2024 through April 2025 for more than 60 global academic programmes. The study found that ChatGPT was the default search tool for Gen Z with two in three prospective students preferring generative AI over Google for search.

While Google queries still outnumber AI queries by a wide margin, this is changing fast, especially among youth. According to the Pew Research Centre, 58% of ChatGPT users in the US are under the age of 30 – more



When a user performs a Google search, it is likely that the first response they will see now is Google's AI Overview

than double Google's share of the college-aged cohort. This demographic trend applies to other major generative AI platforms as well.

Heavy usage in top sending markets

Countries with high outbound student mobility rates account for a significant segment of generative AI users. Global Ipsos research conducted in 2024 among 48,000 people across 47 countries found that UAE (71%), Nigeria (70%), India (69%), South Korea (55%), and Brazil (54%) were among eight countries with the highest use of platforms such as ChatGPT, Gemini, and Claude. Given these platforms' stratospheric growth in users since 2024, these proportions have almost certainly increased.

Why does this Gen Z preference for AI matter?

As Everspring notes, "Generative AI tools are collapsing the search journey, delivering full answers about your institution – and your competitors – before a prospective student ever visits your site. In doing so, they're upending both paid and organic performance and redefining what it takes to stay competitive."

What is behind this impact on paid ads and organic performance? When a user performs a Google search, it is likely that the first response they will see now is Google's AI Overview. This pushes other results – for example, university websites – further down the page, making them less likely to be clicked on. This reduces the chance that students will go to an institutional website because they are less likely to discover it on the internet.

Under five seconds

With help from student friends, we created and launched the following questions to three AI tools ... and got robust answers within five seconds.

- "What is the most beautiful small town in England to study in?"
- "What scholarships can I apply for as a Brazilian student wanting to get a tourism diploma in either Spain or Italy?"
- "What language school should I choose in France if I like adventure and outdoor activities?"
- "Which destinations should you consider if you can't afford a big financial requirement for your visa application?"
- "If I want a high entry-level salary, should I choose an engineering degree or a cloud computing degree?"
- "I am considering a dual degree offered jointly by a UAE university and a Japanese university. Will having a dual degree help my career?"

Comparing AI platforms

All AI tools take users' queries and quickly scan sources to generate a composite response. However, each tool is configured uniquely and prioritises different benefits.

As of this writing, the free version of ChatGPT can be best at delivering quick, conversational results, but not as great at presenting authoritative sources. Perplexity tends to be better for deep research, and it displays citations for easier validation of its answers. And Claude excels at handling long documents and detecting nuance in long-form writing. These are only some of the most popular AI tools ... the list is long and growing.

We asked ChatGPT, Claude, and Perplexity for advice on lovely small towns in England (ChatGPT), language schools with a specialised focus (Claude), and picking a programme field linked to a high starting salary (Perplexity).



ChatGPT

Prompt

What is the most beautiful small town in England to study in?

Response

That's a great question — "most beautiful" is subjective and depends a lot on what you value (history, scenery, pace of life, cost, cultural life, etc.). But I can suggest some of the top contenders in England, weighing beauty *and* suitability for studying. If you tell me your priorities (e.g. proximity to London, tuition cost, how small vs how connected, arts vs nature, etc.), I can narrow further. In the meantime, here are some excellent options:

Top picks: small(ish) beautiful towns / very small cities with good universities or access to one

1. **Durham**
   - Wonderful historic setting: the Cathedral and Castle are UNESCO World Heritage Sites, perched over the River Wear.
   - Population around ~43,000 (so small, compact). It has a charming, walkable centre and plenty of student life.
   - Relatively safe, scenic, good mix of green spaces and heritage.
2. **St Andrews** (though it's in Scotland, not England — just worth noting)
   - Very compact, ancient town, by the coast with beaches + cliffs. Beautiful architecture, historic ambience.
   - Excellent for students (strong student life, very picturesque). If you don't mind that it's not "England", it's one of the prettiest. (If England only, skip this.)
3. **Bath**
   - It's technically more of a city than "small town," but it has a small-town feel in places. Roman baths, Georgian architecture, beautiful streets, hills, parks.
   - Strong university presence, very cultured, lots of museums, cafés, etc. Good choice if you want beauty + amenities.
4. **Canterbury**
   - Historic, cathedral city, cobbled s ↓ ts, rivers, medieval charm. A lot of period buildings, quaint but with enough to keep students busy.

Ask anything

Claude

Prompt

What language school should I choose in France if I like adventure and outdoor activities?

Response

If you love adventure and outdoor activities, I'd recommend looking for language schools in these French regions:

Annecy - Often called the "Venice of the Alps," this is perfect for you. The town sits on a stunning lake surrounded by mountains, offering:

- Water sports like kayaking, paddleboarding, and sailing
- Hiking and mountain biking trails
- Paragliding (Annecy is a world-renowned spot)
- Easy access to skiing in winter
- Several language schools like Ifalpes cater to international students

Chamonix or nearby Alpine towns - If you're serious about mountain sports:

- Year-round outdoor activities (skiing, mountaineering, rock climbing)
- Language schools often combine French lessons with outdoor activities
- Incredible scenery at the foot of Mont Blanc

Biarritz - For ocean lovers on the Atlantic coast:

- Surfing, coastal hiking, and beach activities
- Beautiful Basque country culture
- More relaxed vibe than the Alps

Nice or Antibes - French Riviera options offering:

- Mediterranean water sports

Reply to Claude...

Sonnet 4.5

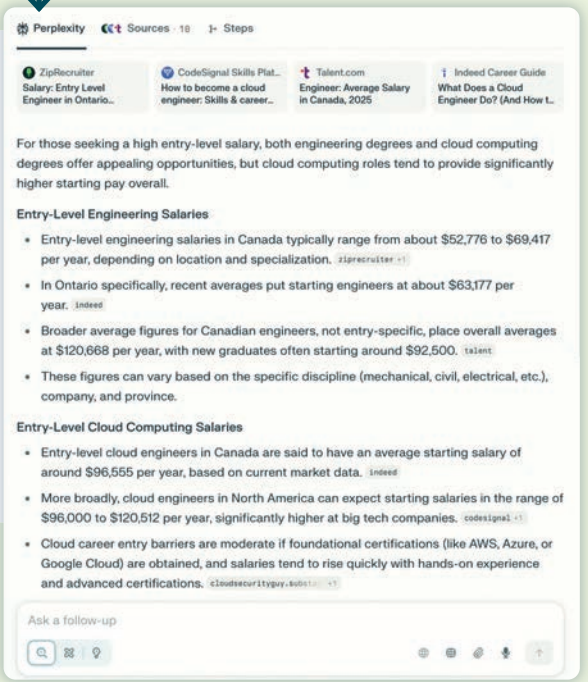
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Meanwhile, in China

The AI platform DeepSeek, which you can read more about on page 43, exemplifies China's race with the US in terms of AI dominance. After ByteDance's Doubao, DeepSeek is the second largest AI platform in China and is popular in Russia as well. ChatGPT and other Western AI platforms are barely used in China, a finding that is significant for many international educators.

Perplexity

If I want a high entry-level salary, should I choose an engineering degree or a cloud computing degree?



The danger of outdated information

At this relatively early stage of AI, there is an unpredictable aspect to the quality and authority of AI responses. To generate its response, the AI races through information on the internet, then selects and presents a comprehensive answer based on the sources it decides are the most relevant. This has important implications.

Let us say that the student's query is, "Please compare graduate tuition fees at the University of Melbourne, University of Barcelona, and Hassan II University of Casablanca."

The AI finds tuition fees at the three institutions and presents a comparison table. However, the fees it includes for one university are from 2019 – because 2019 fees were what was listed on the university's website. If the student does not check the source of the data, they might assume that all the information is current. As you might imagine, this could easily influence where the student decides to apply.

Updating websites regularly with up-to-date information reduces the chance that AI will present inaccurate data to students.

Optimising for AI search

To gain an edge in the generative AI search environment, institutions must lean into an activity called GEO, aka Generative Engine Optimisation. This begins with marketing and admissions teams putting themselves in target students' shoes and thinking of their needs, concerns, and aspirations. Staff then refine the website to be full of corresponding content (copy, photos, videos, data, etc.) to increase the chance that target students will discover their institution in AI searches.

Another goal of GEO work is to mirror the way generative AI tools are designed to answer users' questions. Users tend to submit queries in a casual yet purposeful tone. The AI knows this and consequently hunts down authoritative information phrased in a conversational, plain-language style. Therefore, university and college websites should also use a natural, friendly tone that is

Envisioning GEO

Let us imagine that your institution is a Francophone college in a small Canadian town with strong forestry programmes, and that it has several competitive advantages. Let us also assume that a student is looking for just your kind of offering. We'll look at an illustrative student prompt, then consider the implications for content for a fictional institution's website, social media, and communications – content that is also primed for AI discoverability.

Student prompt

"I want to study in Canada (or France) and I'm interested in forestry and generally in a research type of career. I speak French but I know a bit of English. I can't afford to study at a major university but I want amazing quality. I don't care if I live in a city but the programme has to let me work afterwards in Canada."



Prompt breakdown	Competitive strengths related to prompt
Canada (and advantages relative to France)	• Safe • Tolerant • Strong economy • Stable politically • Ample job opportunities
Higher education institution with research focus	• Applied research • Innovative culture • State-of-the-art facilities
Outside of a major city	• Welcoming community • High quality of life
Francophone	• Situated in region with robust Francophone culture
Affordable	• Lower tuition and cost of living • ROI (e.g., excellent graduate outcomes)
Excellent forestry programmes linked to post-study work eligibility	• Hands-on forestry technician diplomas and certifications • Degrees including Bachelor of Science in Forestry, Bachelor of Forest Business Management
Career services and outcomes	• Career services begin on the first day of school all the way through graduation

UNDRAW

This table represents composite research on Canadian colleges related to the search prompt – it does not represent one college and is rather illustrative. Included sources include Global Citizen Solutions (top 5 education systems), Canadian government website (employment rates in G7), World Economic Forum (global competitiveness), Global Peace Index (peace and stability).

Proof point 1	Proof point 2	Proof point 3	Proof point 4
• 14th of 163 countries in the 2025 Global Peace Index, tied with the Netherlands	• 8th globally for economic competitiveness	• Highest employment rate in G7	• Top 5 globally for education system quality
• $40 million in funding for applied research projects (highest of all Canadian colleges)	• #2 in Canada for applied research projects completed	• Top-ranked lab facilities for forestry, environmental sciences, health, and biotechnology	• International focus and multi-country research collaborations
• Strong links to local and regional industries	• Stunning coastal scenery • Close to ocean	• Incredible national parks	• Easy commutes from anywhere in the town to the campus
• Connections with employers offering jobs in French	• Opportunity to learn English while studying in French	• Robust government supports for Francophone students	• Campus full of students from Francophone countries around the world
• Tuition fees lower than many comparable institutions • Scholarships and financial aid	• Living costs compare well to more expensive options in Canada	• Guaranteed student housing for first-year international students	• Short courses (e.g., 2-year diplomas, 1-year master's, etc.) that cost less to complete than a degree and that are PGWP-eligible
• Institution offers many related fields of study (include a link to "Related programmes" to further pique students' interest)	• Emphasis on sustainable forest management, applied research, and incorporation of technologies such as AI	• Research collaborations with major forestry companies as well as with government-funded sustainability initiatives	• Jobs in forestry grew by 12% this year with increased government funding and private-sector investment in sustainability and climate change adaptation
• Focus on supporting students at job fairs and networking events linked to regional labour markets	• Robust co-op opportunities and employer engagement initiatives	• 90% of graduates find work within six months	• 97% employer satisfaction with graduates of the programme



Hot tips

- Update your content more regularly than you ever have with fresh information. Keep adding new data as soon as you have it. Along with comprehensiveness, generative AI platforms prioritise recency.
- Talk to your international students about your website and what it is missing or could do better. Ask them what they would put in a prompt if they were searching for an institution like yours.
- Prompt AI as if you were an international student. See if your institution shows up and evaluate how it shows up. You may see your competitors appear in the AI response. Check their websites to see where you need to improve content/structure to have AI trust you as much as them when it delivers results. The websites Ubersuggest and Semrush can help you in this regard.

accurate and ideally backed by data for authority (e.g., rankings, graduate outcomes, and satisfaction rates).

In addition, AI tools analyse the "intent-based" context of a prompt. For example, if the prompt is "I want to go to a top-ranked university whose operations are sustainable," the AI will decipher the student's intent to be going to a university that is not just highly ranked, and not just sustainable, but both. For ranked institutions with the competitive advantage of sustainability, it is crucial to place both strengths on the website close together, in plain language, for AI discoverability.

Many students will also ask follow-up questions after their initial prompt. For example, we searched for "top-ranked universities whose operations are sustainable." The AI returned the University of Toronto at the top of its response, ETH Zurich next, and about five others. But we didn't leave it there. We then prompted the AI to tell us which of the options was the most affordable. This time, ETH Zurich came out on top, followed closely by universities in Germany, France, Sweden, and Norway. Those universities may well have designed website content including rankings, sustainability, and tuition fees/scholarships to be more discoverable.

A student's world

More than anything, generative AI puts students in the driver's seat. It considers their questions over branded and sponsored content more than traditional Google search does. It skips past paid ads and performs somersaults to give students answers faster than anyone else does. As a result, your institution must think like students, consider (and research) the questions students care most about, conduct competitive benchmarking and data collection, and then deliver a website that has never provided a better user experience than now.

Want a superpower? Start a student ambassador programme

Only students can tell other students about the real experience of studying at your institution



VITALY GARIEV/UNSPLASH

IN the age of AI, are students still asking human beings for their advice? It depends. When prospective students get information from a platform such as ChatGPT, they can sometimes conclude that they have all the answers, which can diminish their likelihood of (1) going to the university website and pressing the "Contact us" button, and (2) visiting a local agent.

However, an AI response can also inspire prospects to take the next step to see what other people think about the university – especially people with first-hand experience: other students and alumni.

The importance of a student/alumni ambassador initiative is not diminished by AI. Instead, this investment can go a long way towards ensuring that AI may be the first word about your institution, but not the last word.

According to marketing guru Seth Godin, a brand is "a promise and a shorthand for the expectations, memories, stories, and relationships a consumer

has with a product, service, or organisation." That is a phenomenal description of the emotional relationship between brands and their avid fans. This kind of relationship is just not covered by AI. It needs humans.

Students engage with school and university brands on many levels, including by spending hours watching student-created videos about getting ready for school, decorating dorm rooms, cramming for exams, cheering for sports teams, and goofing around with friends. They are looking for a student perspective as much as a list of the objective benefits of an institution. They want to be sure that on top of receiving quality education and good career outcomes, they will belong on campus and have friends and fun.

Student ambassadors can provide accurate, current information about programmes, internships, costs of study, etc. *and* the subjective student experience. This is a superpower! Ambassadors provide the authenticity prospective students crave when deciding on where and what to study.

Why aren't more universities using student ambassadors?

At this year's ICEF Monitor Global Summit in London, an expert panel – George Grainger, co-founder of Alumnify; Sanna Heikkinen, marketing designer at the University of Oulu in Finland; and George Olesen, CEO of The Ambassador Platform – explored the benefits and challenges of student ambassador programmes.

Mr Grainger started off by highlighting why institutions need to consider ambassadors as part of their branding and outreach, saying, "Prospective students are willing to make a huge investment in study abroad, but you need more than traditional marketing to have them choose your university over all the other options they might be considering. Students want to hear the real stories and opinions of other students ... student ambassadors are a unique opportunity."

The panelists also addressed a common worry that investing in an ambassador initiative could lead to unpredictable or unmeasurable ROI. For example, maybe one ambassador would prompt a conversion, while others would not, or maybe an ambassador could even damage the brand by providing inaccurate information by mistake or sharing a video that is too silly or even inappropriate.

The solution, agreed panelists, is to commit to a serious onboarding system and continuous support. Mr Grainger explained that you can't just expect ambassadors to know how to represent your institution without preparing them:

"Training is so important for outcomes. We start with a four-hour bootcamp where we get ambassadors into the nuts and bolts of how to recruit. We explore how to communicate with different stakeholders. We do scenario training, where for example we take on the role of a difficult student or a difficult parent and then help ambassadors learn how best to handle the situation."

Ms Heikkinen said that in her experience, involving ambassadors across marketing functions and activities is great for engagement and results:

"We connect all our marketing activities and design them to be complementary. So our ambassadors contribute to ideas for the website, they gather student testimonials and create videos. They play a role in webinars, open days, high school visits, social media, and more. They're involved in agent cooperation and study fairs. They are integrated because they are part of our team."

Treating ambassadors as valued, important professionals will encourage the results you are looking for. In addition to improved conversions, ROI will come from a strengthened position in key target markets and a reputation as a brand that students can trust.

5 key steps to driving ROI from an ambassador programme





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1 Compensate your ambassadors

Paying them professionalises their job. By paying them fairly, you get to set tasks and responsibilities and require accountability. If ambassadors are simply asked to help out of the goodness of their hearts or for a bullet on their resume, they may deliver variable results. They could hit it out of the park here and there but then fade away when they are busy or distracted. If cost is an issue, start small – even 3–5 ambassadors for your top target markets can make a huge difference.

2 Commit to the relationship

Attach a contract to the work, with a start-and-end date and with regular performance and check-in meetings. Create a list of weekly/monthly tasks the ambassador is required to complete. As George Grainger said, "If you don't build in regularity to the relationship, you run into situations like when all of a sudden, after not contacting an ambassador for months, you need them to attend an event. That's probably not going to work."

3

Choose wisely

Career outcomes are crucial to prospective students. Choose students excelling in programmes you want to promote overseas or alumni who have secured great jobs after graduating. In addition, choose:

- Students and alumni who are passionate about what going to your school has done for them. Those people are going to be the most engaging, authentic, and persuasive.
- Current students or recent alumni. Someone who graduated 5 years ago instead of 12 months ago won't have the same fresh take on studying at your university.
- People who are good communicators and presenters.





4

Train and nurture

Develop a rigorous onboarding programme for your ambassadors, since ideally, they will serve as an extension of your marketing team. Provide comprehensive training, have your staff welcome them, and make them feel valued. Consider ambassadors part of your 360-degree branding: show them how they can support all other functions (e.g., agents and in-country representatives, digital campaigns, social media posts, etc.).



5

Clarify and prepare

Clearly define what kind and tone of content the ambassador can create to represent your school, and delineate what they can and cannot say to students. Then, provide them with a set script so they can confidently direct sensitive questions (e.g., immigration-related) to appropriate staff members. For many activities such as fairs, online discussions, and events, ask your ambassadors to have their laptop open so they can easily and quickly pull up accurate information about a wide variety of programmes, tuition fees, accommodation, etc.

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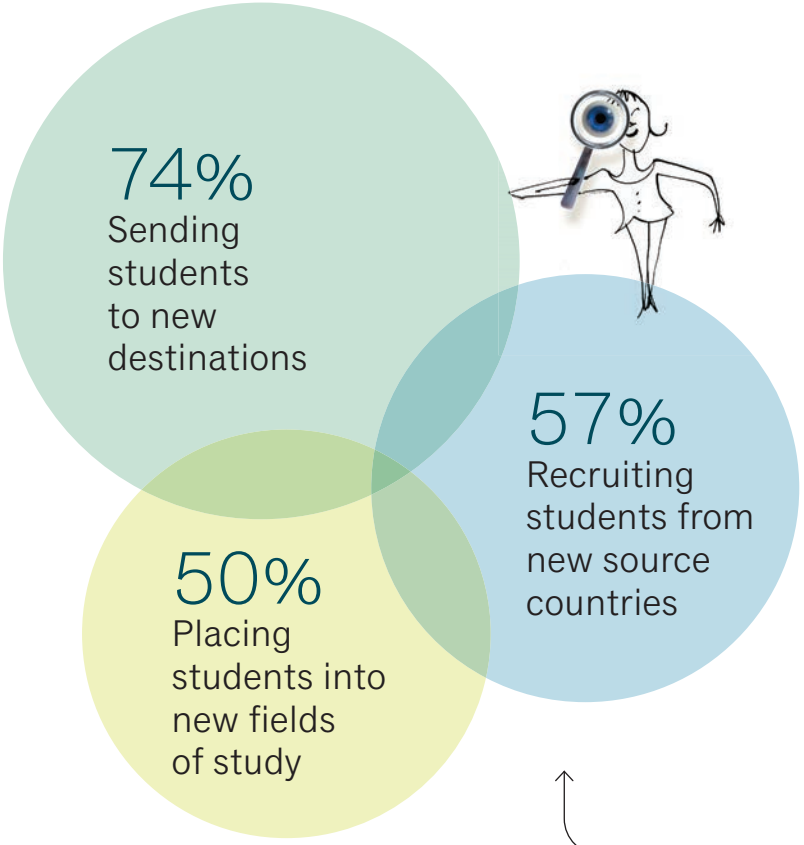
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AGENT VOICE

Main ways education agents are changing how they recruit and advise students



The 2025 ICEF Agent Voice survey asked education agents how they have evolved their recruitment activities over the past two years.

Agents' answers underline the rapidly shifting drivers of student choice and expanding range of destinations for which there is demand. In addition, the 50% of agents saying they are placing students into new fields of study suggests that agents are counselling students with a much clearer understanding of labour markets than in the past.

Many students now walk into agents' offices with plenty of ideas about what and where to study. For example, a student can search "engineering programmes with good graduate outcomes" and immediately receive a list of options. We conducted this search ourselves and the results that came back included universities' employment rate six months after graduation, starting salary ranges, and major research and industry collaborations.

Students' greater access to such knowledge has an implication for institutions working with agents. It is not enough to push a general marketing brochure at agents, have a meeting once or twice a year, and expect results. The best results come from working together.

SOURCE: ICEF AGENT VOICE (2025)

Top tips for institutions

- Work closely with agents to understand local student demand, other institutions recruiting in the market, and what constitutes a competitive advantage.
- Give agents enough high-quality information and ongoing training that they can confidently promote your programmes to students whose list might not initially include you – but should.
- Increase your availability to agents. If they have a solid lead but are missing one crucial bit of information the student wants to know, provide that information and support asap. It could be the difference between a lead and an enrolment.

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