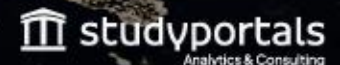


Jan-Mar 2026 Intake

# The Global Enrolment Benchmark Survey

## Global Summary Report



# Want your institution in the next edition?

Sign up to take the next 6-minute survey (Aug–Oct 2026 edition) and get a free enrolment benchmark report.

[Get notified when it opens](#)



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# About the partners

## About NAFSA: Association of International Educators

International education is the cornerstone for building a more understanding and peaceful world. NAFSA serves the needs of more than 10,000 members and international educators from more than 4,300 institutions in more than 170 countries. It is the largest and most comprehensive organization dedicated to international education and exchange, working to advance policies and practices that build global citizens with the knowledge and skills they need to succeed in today's interconnected world.

## About Oxford Test of English

The Oxford Test of English, Oxford Test of English Advanced and Oxford Test of English for Schools have been developed by Oxford University Press (OUP) and are endorsed by the University of Oxford. They have undergone years of research, rigor, and quality assurance to ensure they meet the highest standards in English language assessment and join a suite of renowned learning resources published by OUP which empower English language learners across the world.

## About Studyportals Analytics and Consulting

Studyportals is the world's most comprehensive study choice platform, helping students to choose their best-fit study across 270,000+ English-taught programmes from 3,700+ institutions in 119 countries. Over 40 million students use Studyportals platforms annually to find and compare their study options across borders and select the right programme. Our goal is to make education choice transparent, globally. Based on the search and choice behaviour of millions of students, our Analytics and Consulting team provide real-time, forward looking market insights on student interest, institutional offering, pricing, student success, graduate outcomes and the changes in the competitive landscape for international education.



# Supporting partners

## About the Canadian Bureau for International Education

The Canadian Bureau for International Education (CBIE) is a national, bilingual, not-for-profit, membership organization dedicated to the promotion of Canada's international relations through international education: the free movement of ideas and learners across national boundaries. CBIE's activities comprise scholarship management, civil society and public sector reform, research and information services, advocacy, training programs, professional development for international educators and other services for members and learners.

## About the European Association for International Education (EAIE)

Founded in 1989, the European Association for International Education, better known as the EAIE, is the European centre for expertise, networking and resources in the internationalisation of higher education. They are a non-profit, member-led organisation serving individuals actively involved in the internationalisation of their institutions.

## About the Asia-Pacific Association for International Education (APAIE)

The Asia-Pacific Association for International Education (APAIE) aims to advance education through enabling greater cooperation between institutions; to enrich and support international programs, activities and exchanges; and to promote the value of international education within the Asia-Pacific region.

## About Universities UK International

Universities UK International (UUKi) represents UK higher education institutions (HEIs) globally and helps them flourish internationally. To do this we actively promote UK HEIs abroad, provide trusted information for and about them, and create new opportunities through our unique ability to act at sector level. We draw on UK university expertise to influence policy in the UK and overseas, delivering information, advice and guidance to facilitate mutually beneficial collaboration between UK HEIs and a broad range of international partners.



# Reader's Guide

- **Where does this data come from?**

This report is based on what universities told us. To maintain data quality and integrity, checks were conducted for consistency and potential duplication.

- **What does "X% of universities" mean?**

It means that percentage of the universities that answered that particular question. Not all institutions answered every question.

- **How were regional groupings chosen?**

Region and country breakdowns are determined by the number of responses. Response rates varied by region, so some figures are based on smaller samples than others. Please note the sample size when interpreting responses from different parts of the world. Total figures will also be influenced by the representation of respondents from different regions.

- **Are bigger universities weighted more heavily?**

No. One small university and one large university count equally here. Percentages show averages across institutions, not student headcounts.

- **What time period does this cover?**

New international students who enrolled between January and March 2026. All comparisons are against the same intake period in 2025.

- **Who took part?**

254 universities from 36 countries. The breakdown by region: 149 from the US, 39 from Europe, 24 from the UK, 13 from Canada, 9 from Australia, 9 from APAC (excluding Australia).

**You can read the full methodology at the end of this report.**



Part One

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# Context and key findings

How international enrolments have shifted

# Key findings

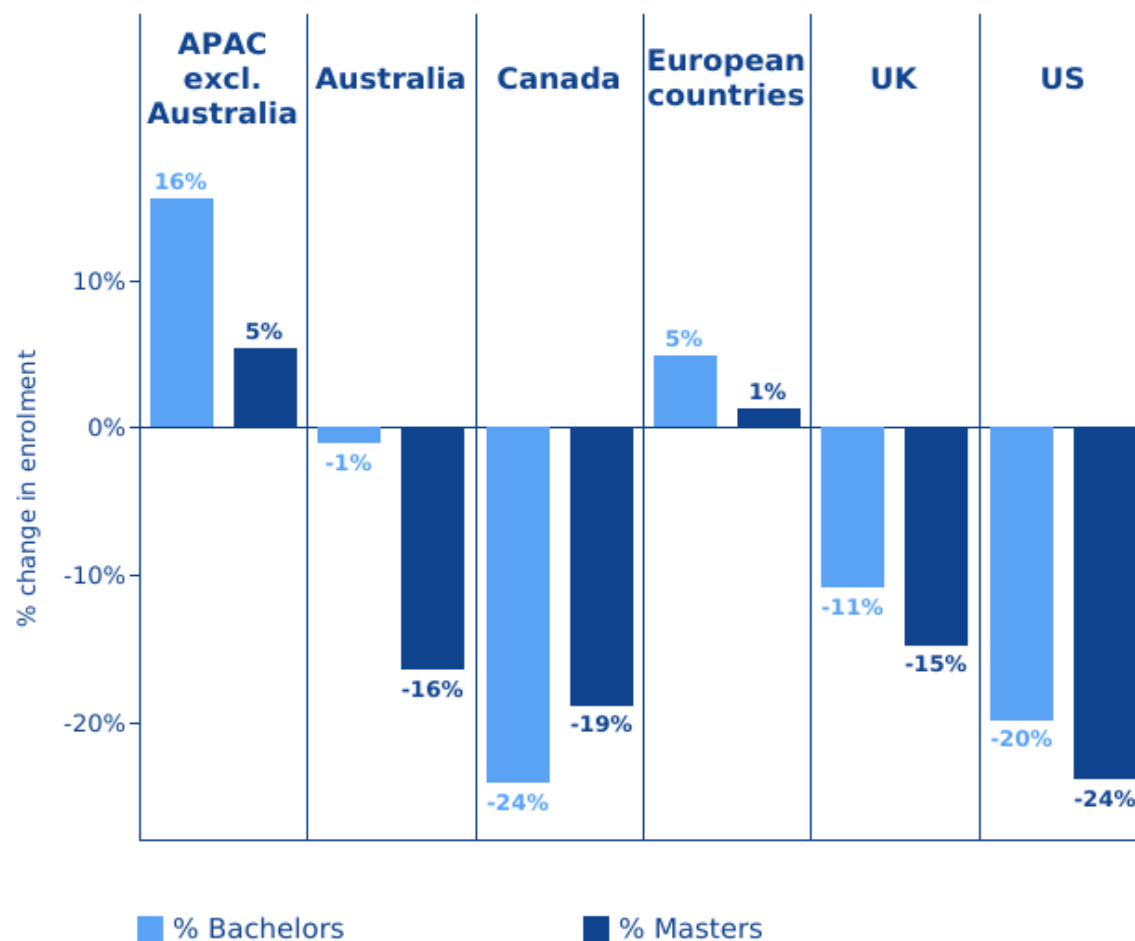
- Half of universities surveyed reported lower enrolments compared to the same intake last year.
- Australia, Canada, the UK and the US saw declines for both Undergraduate and Postgraduate enrolments. Institutions in European countries and in APAC (excl. Australia) reported enrolment growth, particularly at undergraduate level.
- 73% of universities surveyed reported that restrictive government policy and visa issues are a significant issue, with 67% mentioning these issues as having the biggest negative influence on enrolments.
- Half of institutions saw affordability and cost of living as a significant issue.
- In Canada and European countries, almost a quarter of universities surveyed see meeting English proficiency requirements as a significant issue.
- Reported gains in international enrolment are primarily linked to institutional actions and decisions, rather than external market or policy factors.
- Introducing new programmes was the most cited positive influence on enrolments, followed by geographic diversification, and strategic marketing.
- Diversification into new markets was the most anticipated plan for universities over the next year, followed by budget cuts.

# How enrolments have evolved since the same intake last year

This chart captures the growing divergence in international enrolment outcomes across regions, and between levels of study. APAC countries (excl. Australia) and European countries stand out as the exception to the prevailing downturn, with undergraduate enrolments rising sharply.

The 'Big Four' destinations Australia, Canada, the UK and the United States all report substantial contractions across both Undergraduate and Postgraduate enrolments.

Average change in new international enrolments vs. same intake last year



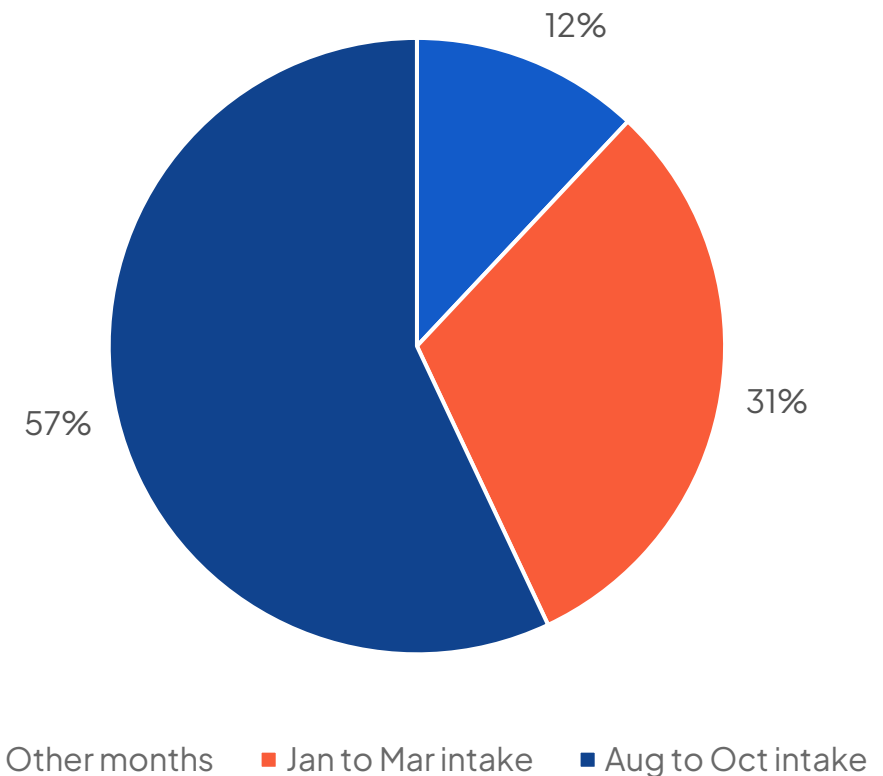
# The strategic importance of Q1 start dates

Several universities cited the introduction of January start dates, to manage visa unpredictability and to capture students who would otherwise defer or drop out of the cycle.

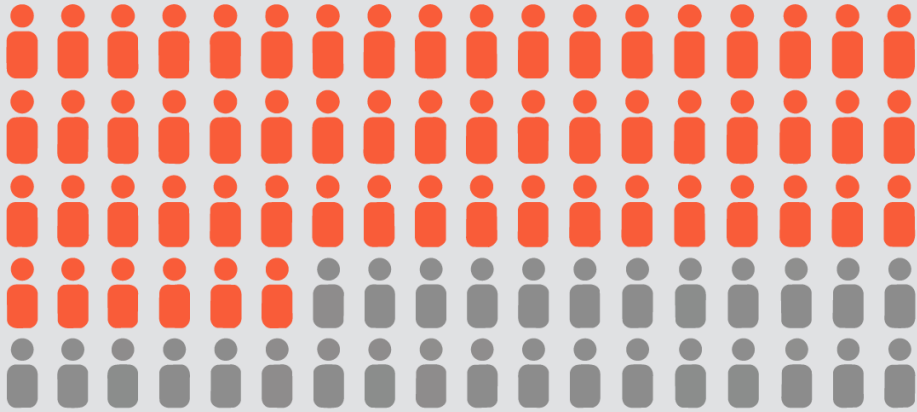
Institutions that had offered January starts for a second year or promoted them across a full recruitment cycle reported improved traction.

One global recruitment calendar rarely works well for all markets. Understanding demand by origin country can help to prioritise marketing and recruitment activities. Certain countries show a notably stronger preference for the January to March intake than their peers elsewhere. In fact, more than a quarter of all Bachelor's and Master's programme interest generated by students from South Africa, Nepal, New Zealand, Australia, and Malaysia is directed toward programmes with a January to March start date.

## Start dates for on-campus Bachelor's and Master's programmes on Studyportals



## Negative Factor #1



# 67%

of respondents mentioned visa and policy issues

## What had the biggest negative impact on enrolments?


Two thirds of respondents who answered the question 'What had the biggest negative influence on enrolments?' mentioned issues with visas and government policy. Many describe how policy volatility directly suppressed realised enrolments, converting offer-holders into deferrals, late arrivals, or losses to alternative destinations.

Universities frequently connect affordability and policy risk, suggesting that concerns about return on investment for students, magnify the impact of uncertainty.

# Top 10 Positive Factors Driving Enrolments

Ranked by number of mentions

<b>1</b> Introduction of new programmes	<b>44</b>	<b>6</b> Personalised communication	<b>25</b>
<b>2</b> Diversification / geographic expansion	<b>37</b>	<b>7</b> Institutional partnerships / pathways	<b>22</b>
<b>3</b> Branding / strategic marketing	<b>35</b>	<b>8</b> In-country transfers (US)	<b>21</b>
<b>4</b> Scholarships / financial incentives	<b>33</b>	<b>9</b> Introducing a January start / intake	<b>14</b>
<b>5</b> Recruitment partners / agents	<b>29</b>	<b>10</b> Increasing conversion / yield	<b>13</b>



Despite an increasingly uncertain policy environment, the survey shows that institutions willing to innovate and adapt can still create meaningful pathways for student success and access. Therefore, student flows depend on both institutional resilience and policies that enable, rather than restrict, global talent mobility. Institutions can and must exercise greater agency to counter serious external forces.



**Fanta Aw, PhD**

Executive director and CEO of NAFSA:  
Association of International Educators





Part Two

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# Regional trends

Where universities saw enrolment growth or decline

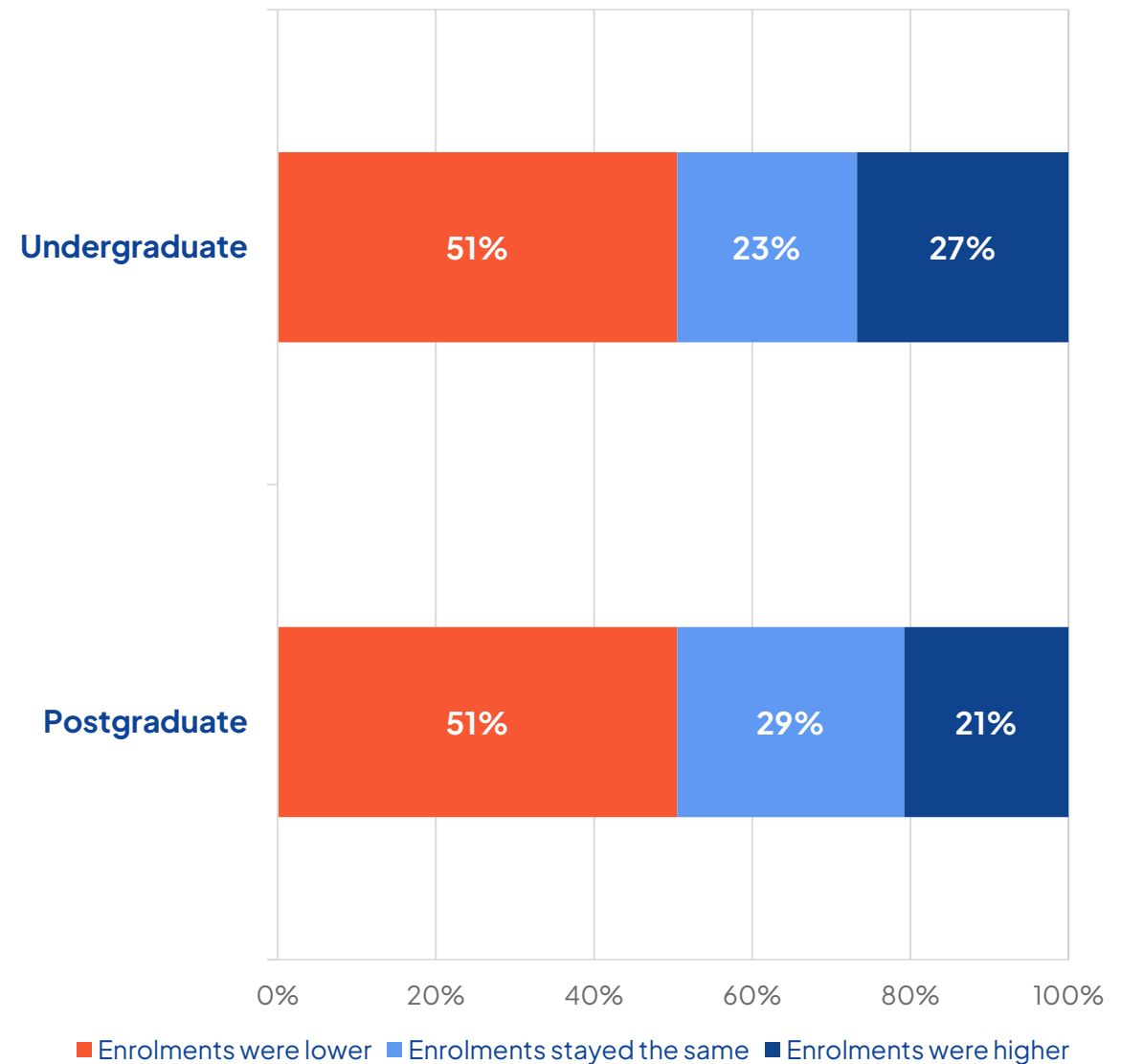
# Undergraduate and Postgraduate enrolment trends

Undergraduate enrolments were lower for half of university respondents. 27% saw higher enrolments, while 23% said enrolments stayed the same.

At Postgraduate level 51% reported lower enrolments, 29% said enrolment stayed the same, and 21% said enrolments were higher.

At both levels falls in enrolment were both more common and more severe than enrolment growth.

## Changes in International enrolments



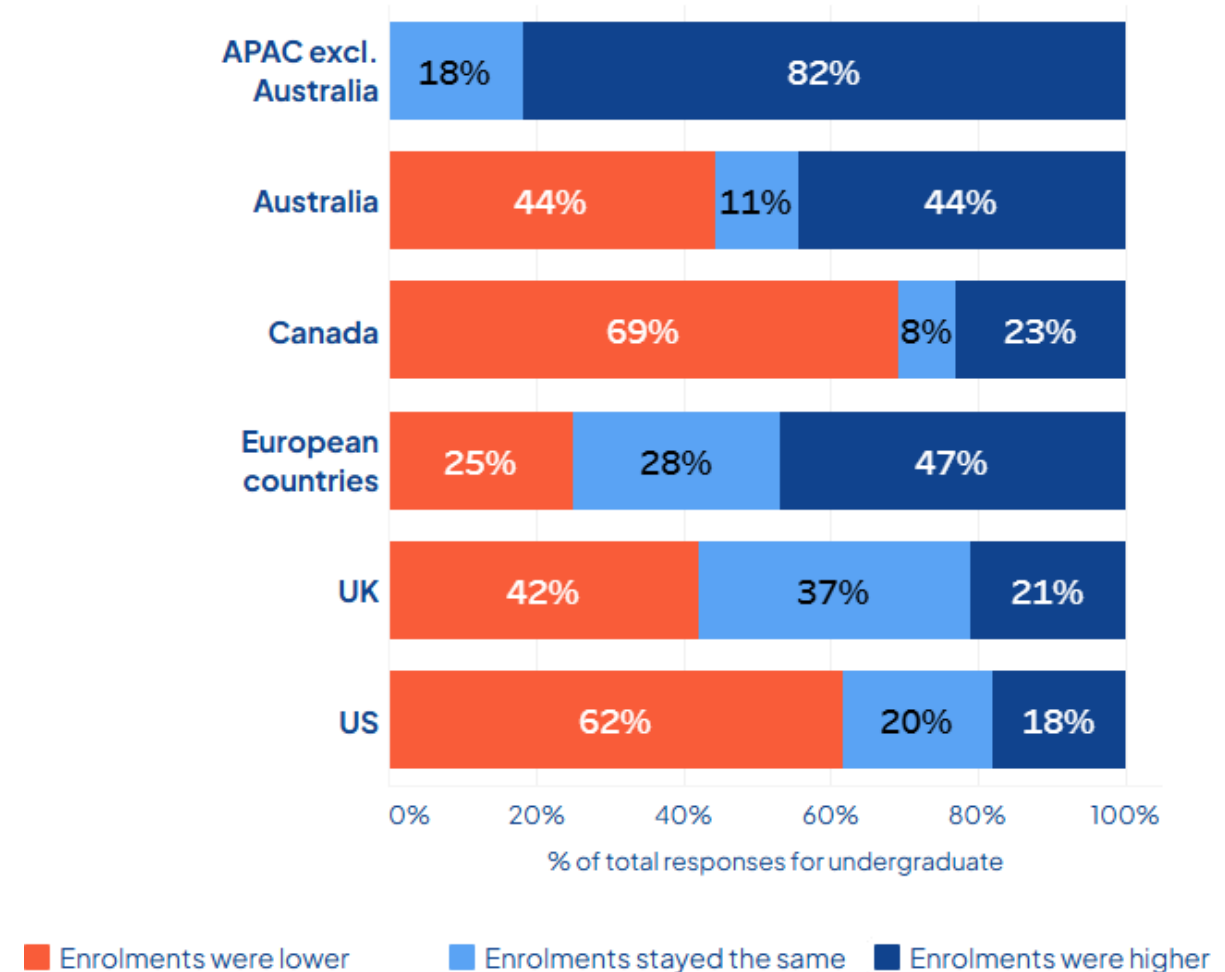
# Breaking it down by region

## UNDERGRADUATE ENROLMENTS

69% of Canadian institutions, 62% of American institutions and 42% of UK institutions reported lower enrolments at Undergraduate level.

82% of institutions in APAC (excluding Australia), and 47% of institutions in Europe reported enrolment growth.

## Changes in international Undergraduate enrolments



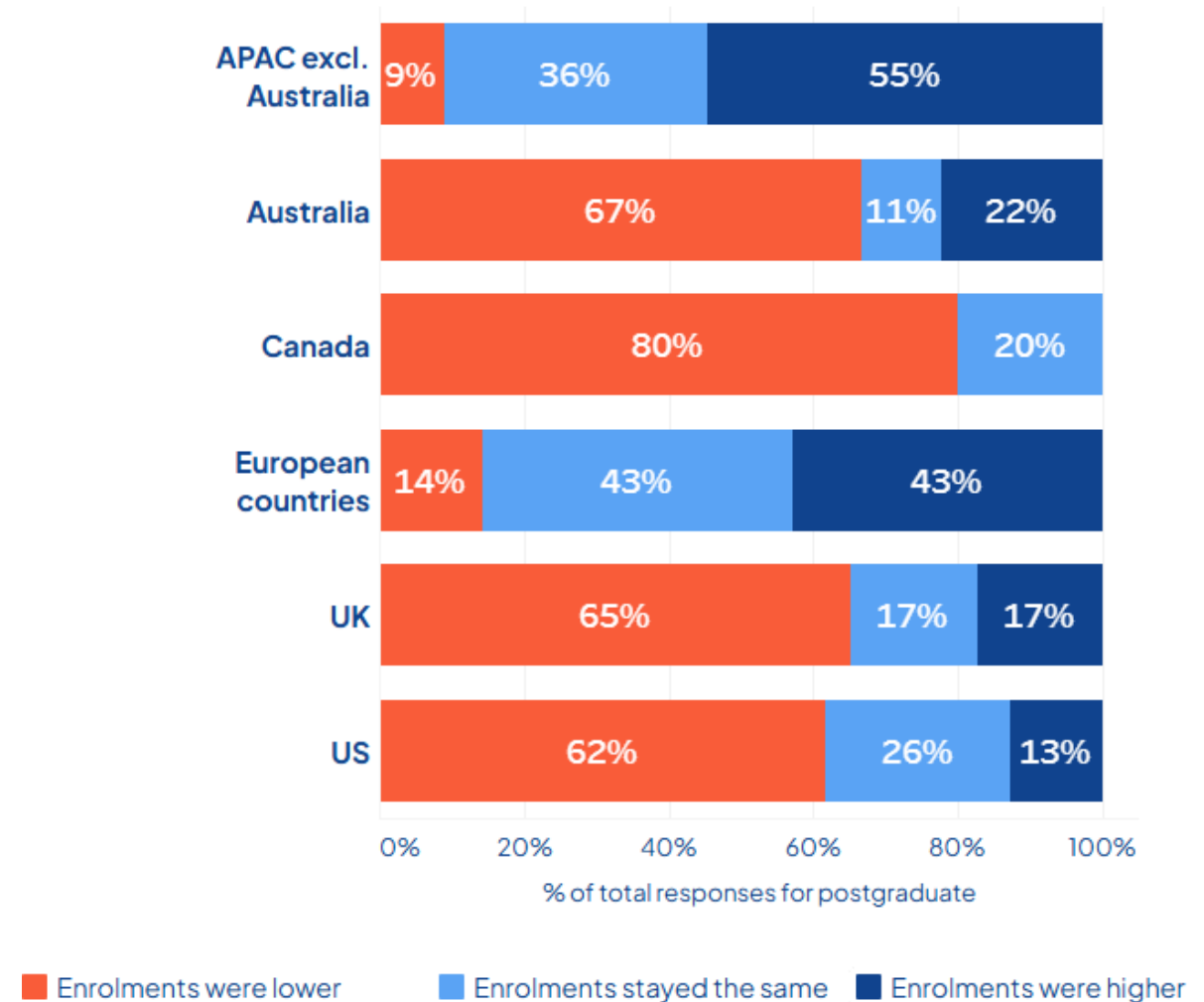
# Breaking it down by region

## POSTGRADUATE ENROLMENTS

Australia, Canada, and the UK saw more institutions reporting declines at Postgraduate level than Undergraduate level. 80% of Canadian institutions, 67% of Australian institutions, and 65% of UK institutions reported lower enrolments.

Meanwhile, enrolments were higher at 55% of institutions in APAC (excluding Australia) and 43% of institutions in European countries

## Changes in international Postgraduate enrolments





Part Three

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# Obstacles faced

Policy restrictions, visa challenges and affordability

# The percentage of institutions that see these obstacles as a significant issue



A lack of suitable accommodation

**13%**

(Down from 20% in H1 2025)



Affordable tuition & cost of living

**49%**

(Up from 46% in H1 2025)



Meeting academic requirements

**9%**

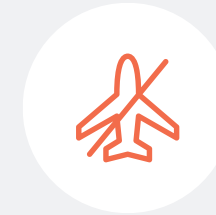
(Down from 15% in H1 2025)



Meeting English proficiency requirements

**9%**

(Down from 11% in H1 2025)

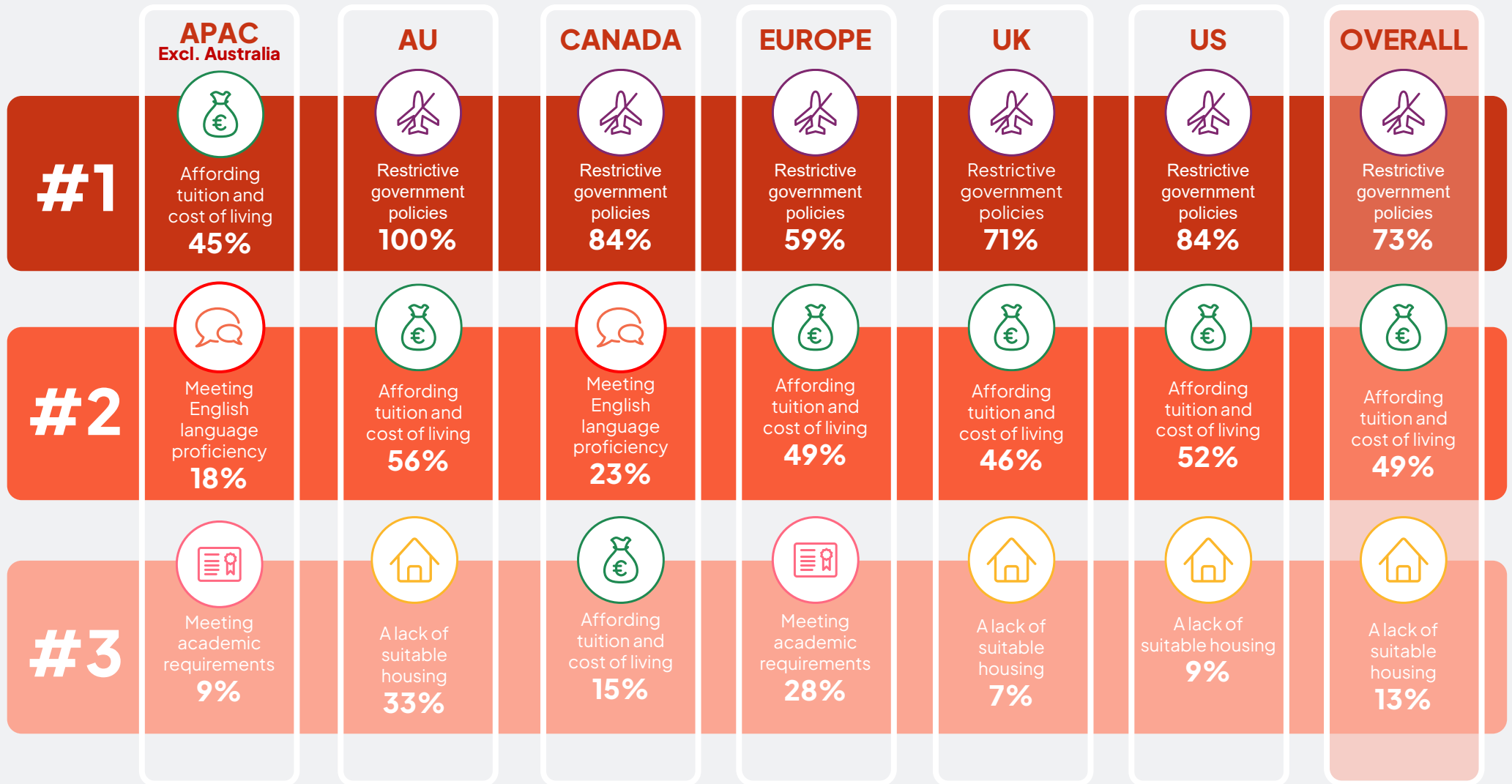


Restrictive government policies / Issues obtaining a visa

**73%**

(Up from 62% in H1 2025)

# Obstacles





Part Four

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# Plans for the next 12 months

What universities will do next

# The percentage of institutions that see these plans as very likely in the next year



Budget cuts

**32%**

(Down from 38% in H1 2025)



Diversification into new markets

**37%**

(Down from 43% in H1 2025)



Expansion of online programmes

**30%**

(Unchanged from 30% in H1 2025)



Increased use of artificial intelligence

**26%**

(Unchanged from 26% in H1 2025)



Large changes to programmes

**10%**

(Down from 17% in H1 2025)



More aggressive enrolment goals

**27%**

(Down from 33% in H1 2025)

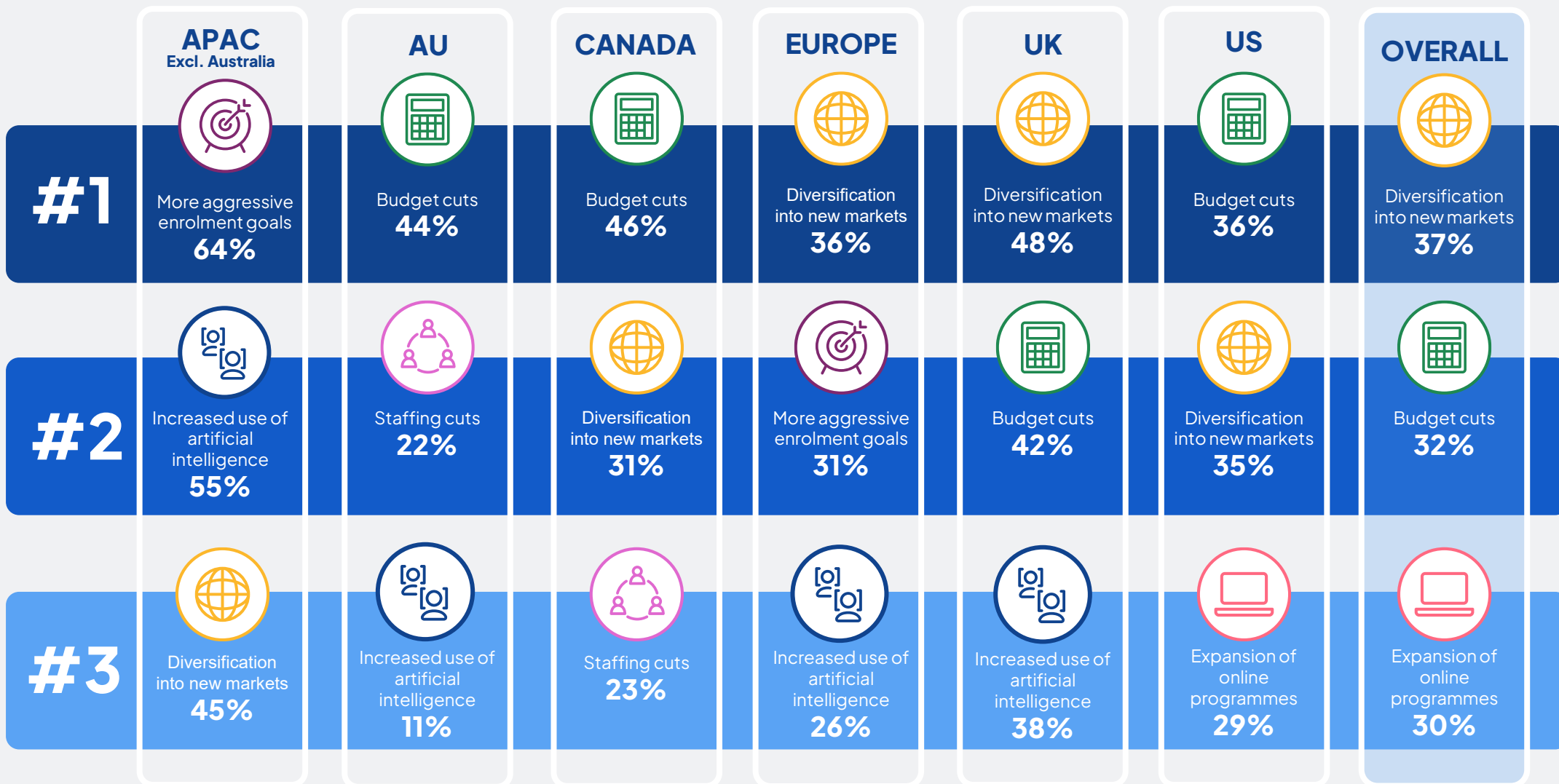


Staffing cuts

**13%**

(Down from 17% in H1 2025)

# Most anticipated plans for the next 12 months





Part Five

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# Conclusion

What this means for international education

# Conclusion

**The Jan–Mar 2026 intake shows a sector under pressure, but not a sector without hope.**

Enrolments fell across much of the English-speaking world. Visa uncertainty, rising costs, and policy instability took a real toll. But universities in Europe and APAC bucked that trend.

Across regions, the positive influences on enrolments came down to what institutions chose to do: launching new programmes, reaching into new markets, and meeting students where they were.

External pressures are real, but they are not the only factor. The institutions that grew did so because they adapted.

The Global Enrolment Benchmark Survey exists to help institutions make sense of what is happening around them and to separate the challenges they can act on from the ones they cannot. Because the right response to a shifting landscape is not to wait it out. It is to understand it better and move faster.

Student demand for international education remains strong. The institutions that will capture it are the ones that treat uncertainty not as a reason to pause, but as a reason to think differently.



Part Six

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# Methodology

Survey design and approach

## Survey design and administration

The Global Enrolment Benchmark Survey was conducted from 23 March to 17 April 2026, through an online survey platform. The survey targeted international student recruitment professionals and senior administrators at higher education institutions worldwide, focusing on enrolment data for the January to March 2026 intake period.

The survey was distributed through partner networks including NAFSA: Association of International Educators, Oxford Test of English, Studyportals, The European Association of International Education (EAIE) Asia Pacific Association of International Education (APAIE), Universities UK International (UUKi), and the Canadian Bureau of International Education (CBIE), reaching institutions across the world.

## Survey instrument

The survey consisted of multiple-choice and scaled response questions covering three primary areas:

- International student enrolment numbers by level of study (Undergraduate, Postgraduate taught, postgraduate research)
- Obstacles and barriers affecting student enrolment
- Institutional strategies and anticipated changes over the next 12 months

## Sample composition

254 institutions from 36 countries completed the survey. The breakdown of responses per country and region can be found on the next pages. Institutional types varied and included public universities, private universities, research-intensive institutions, and teaching-focused colleges. Participation was voluntary and institutions self-selected into the survey, which may introduce response bias. The survey's value will continue to grow as participation increases and data can be analysed at a more granular level.

## Open-ended questions

Open-ended survey questions asked respondents to identify the positive and negative factors most influencing international student enrolments. Major topic categories were established based on recurring themes in responses. Responses could be coded to multiple topics where applicable (e.g., a response mentioning both "diversification" and "personalised outreach" would be counted under both topics. Text-based responses also provided additional context for the analysis

## Limitations

The response rate varied significantly across regions, potentially introducing geographic bias and limiting the ability to generalise in less-represented areas. Although efforts were made to ensure a representative sample, the final number of respondents may not fully capture the diversity of the entire higher education landscape.

Year-over-year comparisons should be interpreted carefully, as the responding institutions may not be identical across survey editions.

It is advised to follow best practices and consult multiple data sources for decision-making. Institutions are advised to triangulate these findings with official government statistics, institutional data, and market-specific research relevant to their strategic priorities.

## Data quality and validation

To maintain data quality and integrity, checks were conducted for consistency and potential duplications, with any duplicates removed to avoid data inflation. Response patterns were also analysed to identify outliers, and responses that appeared inconsistent or showed patterns of straight-lining were flagged for further review or exclusion. All data were anonymised and insights presented solely at an aggregate level to protect respondent confidentiality.

## Analytical approach

Data were analysed using descriptive statistics, with findings aggregated at global, regional, and country levels where sample sizes permitted. Percentage calculations exclude non-responses unless otherwise noted. Regional comparisons focus on directional trends rather than statistical significance testing due to the non-probability sampling approach. Percentages may not total 100% due to rounding.

# Groupings

## APAC (excl. Australia)

Country	Number of Respondents
Fiji	1
India	1
Malaysia	1
New Zealand	4
Singapore	1
Taiwan	1
<b>Total</b>	<b>9</b>

## Australia

Country	Number of Respondents
Australia	9

## Canada

Country	Number of Respondents
Canada	13

## US

Country	Number of Respondents
United States	149

## UK

Country	Number of Respondents
United Kingdom	24

## European countries

Country	Number of Respondents
Belgium	2
Cyprus	1
Czech Republic (Czechia)	4
Finland	1
France	5
Germany	3
Hungary	1
Ireland	2
Italy	3
Netherlands	3
Poland	3
Spain	5
Sweden	1
Switzerland	1
Turkey	4
<b>Total</b>	<b>39</b>

# Groupings

## Other

Country	Number of Respondents
Argentina	1
Azerbaijan	1
Brazil	1
Dominican Republic	1
Ecuador	1
Jamaica	1
Mexico	1
United Arab Emirates	1
Uruguay	1
Uzbekistan	1
Zambia	1
<b>Others Total</b>	<b>11</b>



# studyportals

Analytics & Consulting

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Want to understand mobility trends more deeply and turn that knowledge into real enrolment growth?

Contact us: [hello@studyportals.com](mailto:hello@studyportals.com)