

Current trends, challenges, and opportunities in international education

BONARD presentation

Sarah Verkinova, Head of International Education

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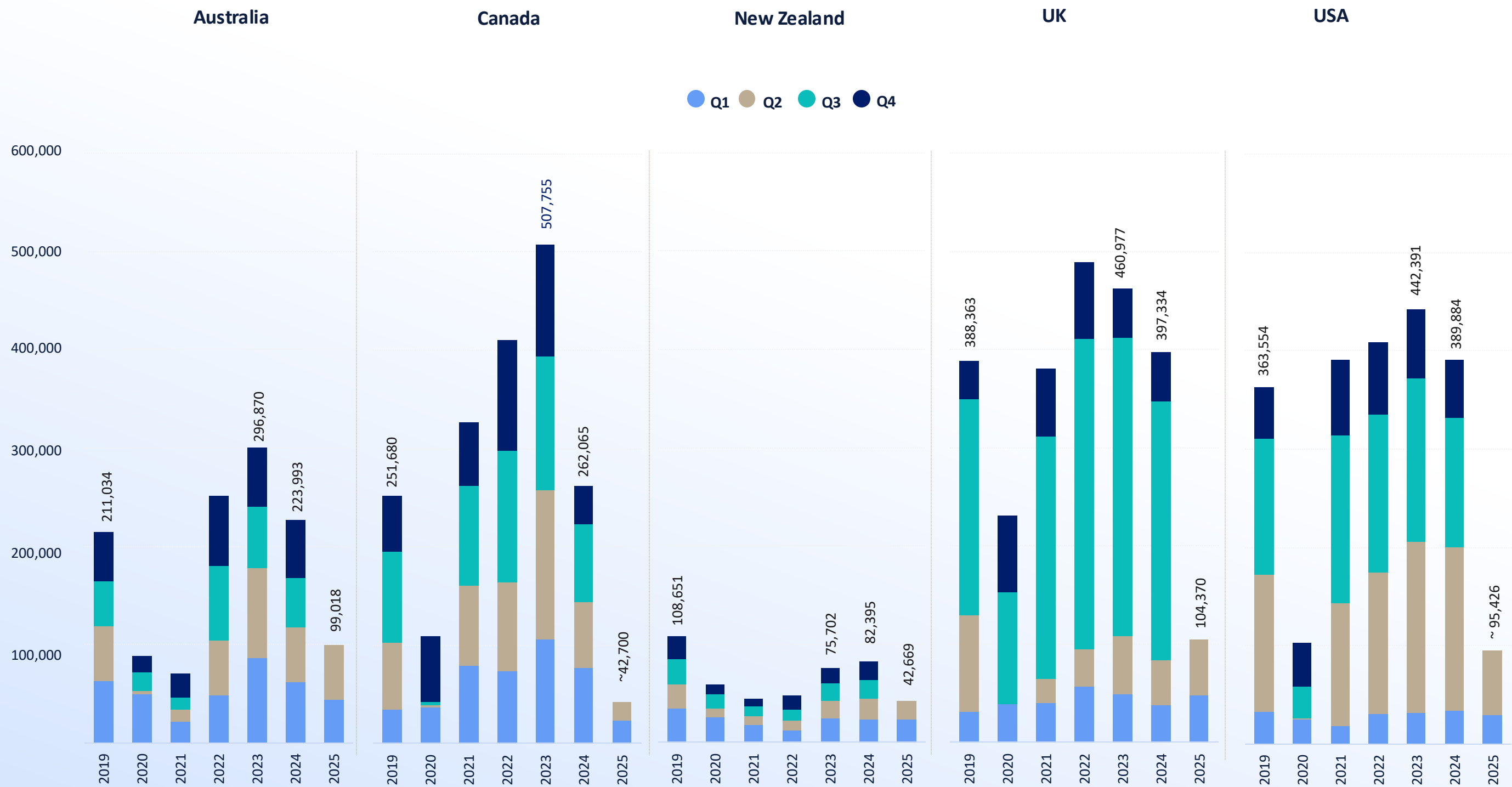
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Student Visa Grants: All Study Levels



AT A GLANCE

- **Stable performance of Australia** – growth in HE segment.
- Anticipated continued **decline in Canada**.
- **NZ dropped in HE sector** (- 10%% YOY in Q2 2025).
- **Ongoing growth in the UK, benefiting from other destinations** - 24% increase in grants, growth in applications by 23%.
- **The US faced another quarter of decline** – F-1 student visa issuance down by approx. 60%.

Source: Australian Government Department of Home Affairs, Immigration New Zealand, IRCC, UK Home Office, U.S. State Department, 2025

International Student Migration: Declining Share of the Big Four

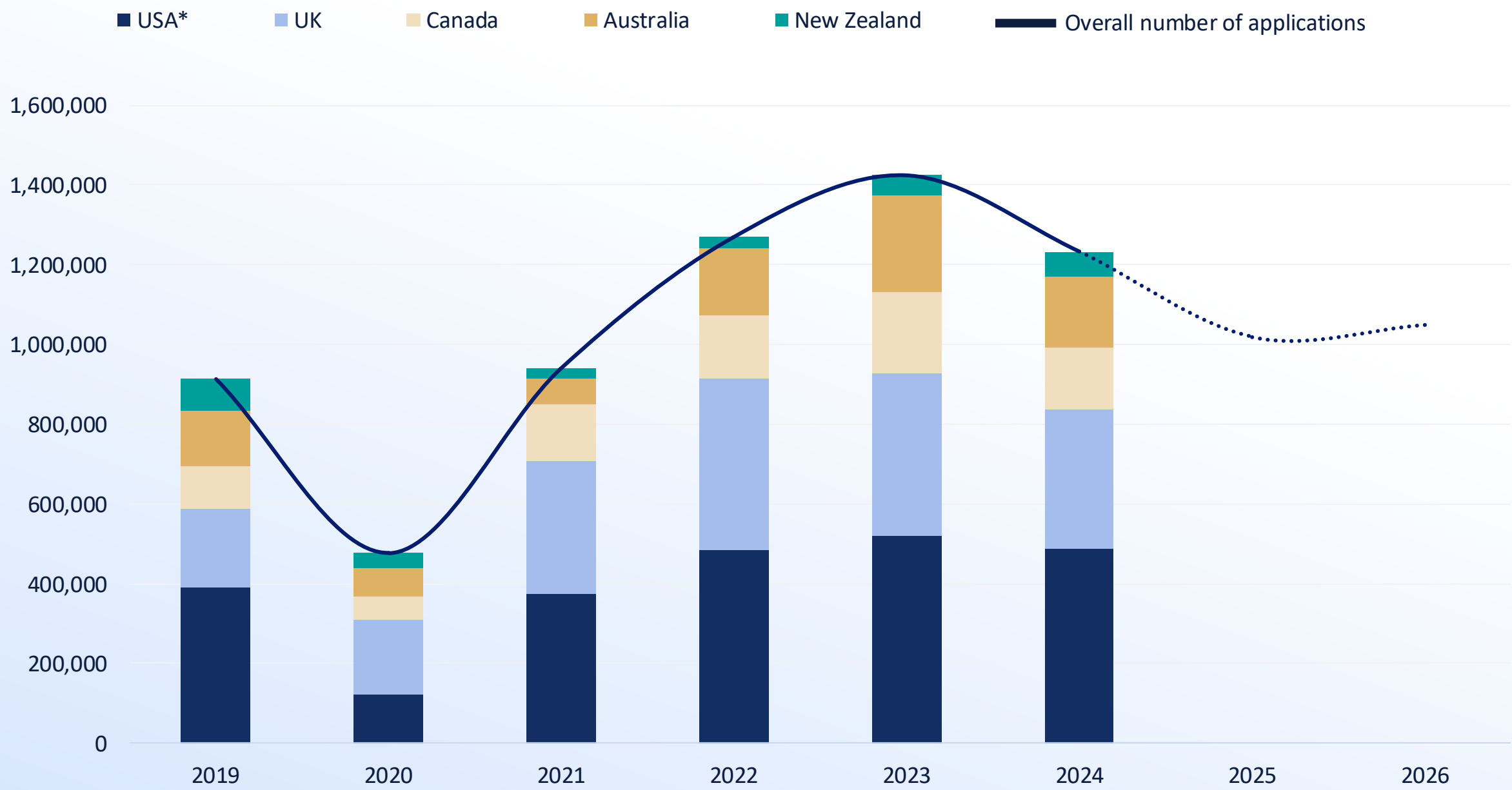
“450,000 students are shifting away from traditional study destinations”



*Big Four = US, UK, Canada, Australia

Student visa applications: 2025 impact and 2026 projections

HIGHER EDUCATION STUDENT VISA APPLICATION FORECAST



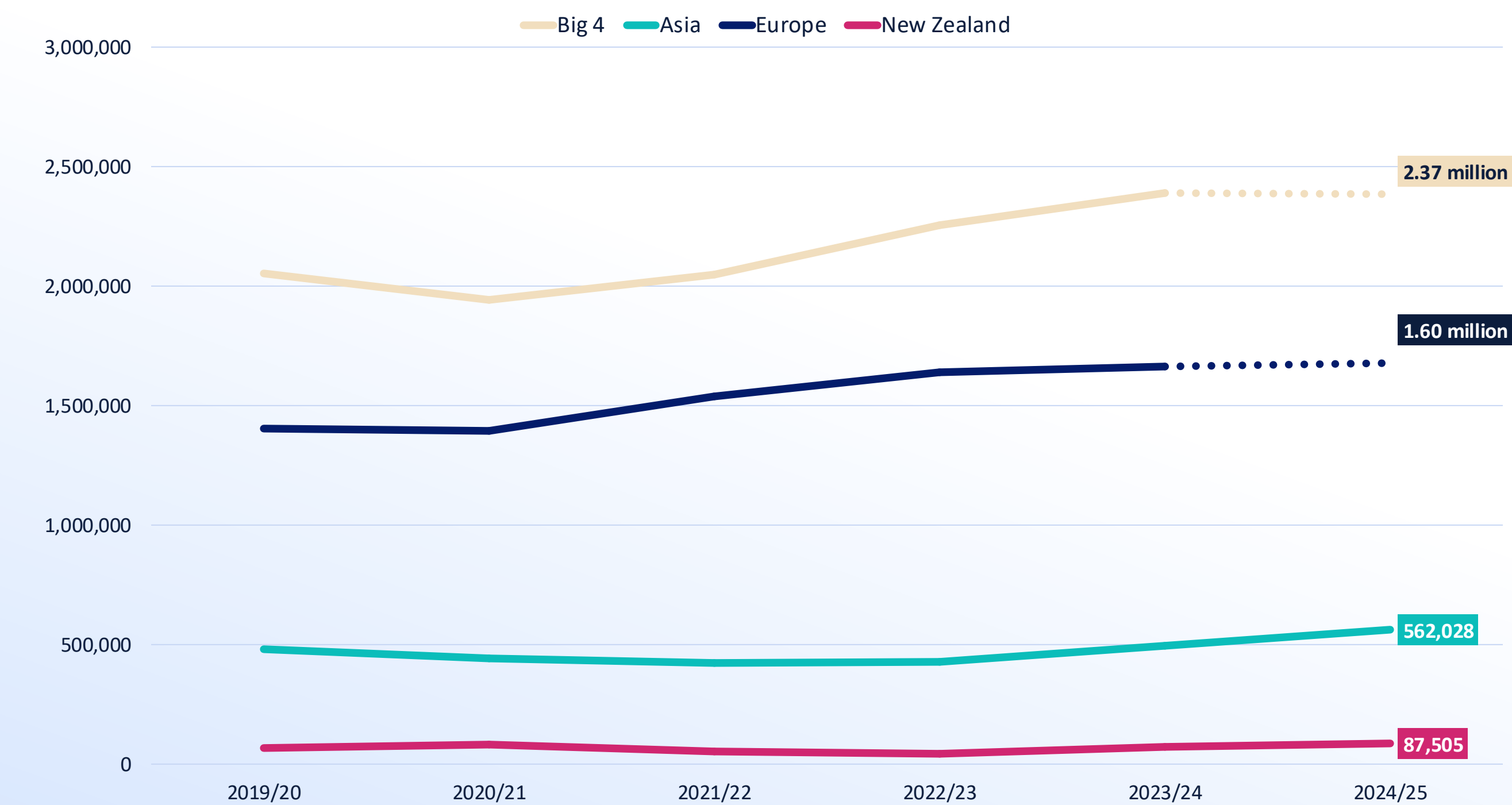
*Note: Figures for US student visa applications are estimates, as official application data is unavailable.
Source: Australian Government, Department of Home Affairs; Immigration New Zealand, IRCC, UK Home Office, U.S. State Department, 2025

AT A GLANCE

Student visa grant rate by destination (%):

	2024	2023
USA	60% (est.)	64% (est.)
UK*	95%	97%
Canada	67%	71%
Australia	88%	82%
New Zealand	92%	97%

Global HE Enrolment Trends: Big Four vs. Europe and Asia



AT A GLANCE

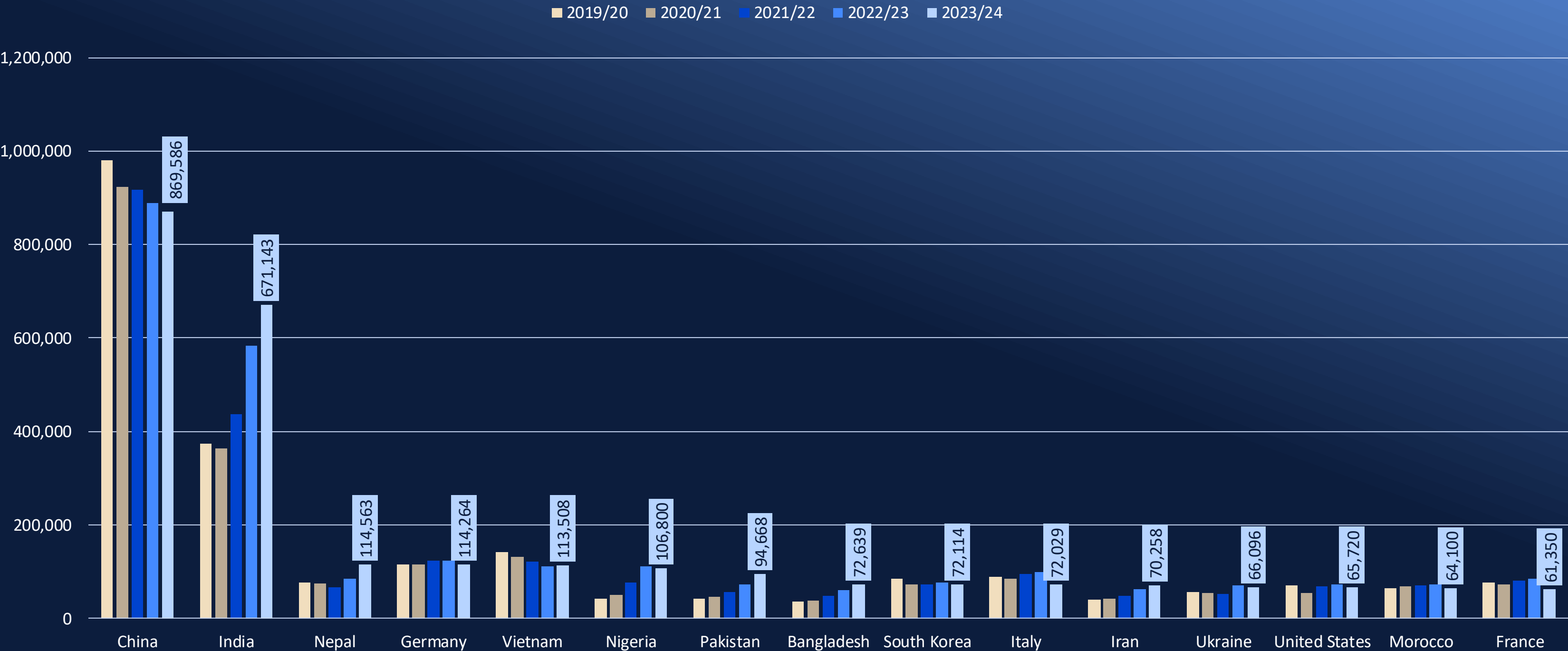
Regional data coverage:

Asia – South Korea, Malaysia, Hong Kong, Japan

Europe – Germany, France, Italy, Poland, Austria, Finland, Portugal, Ireland, Switzerland, Norway, Spain

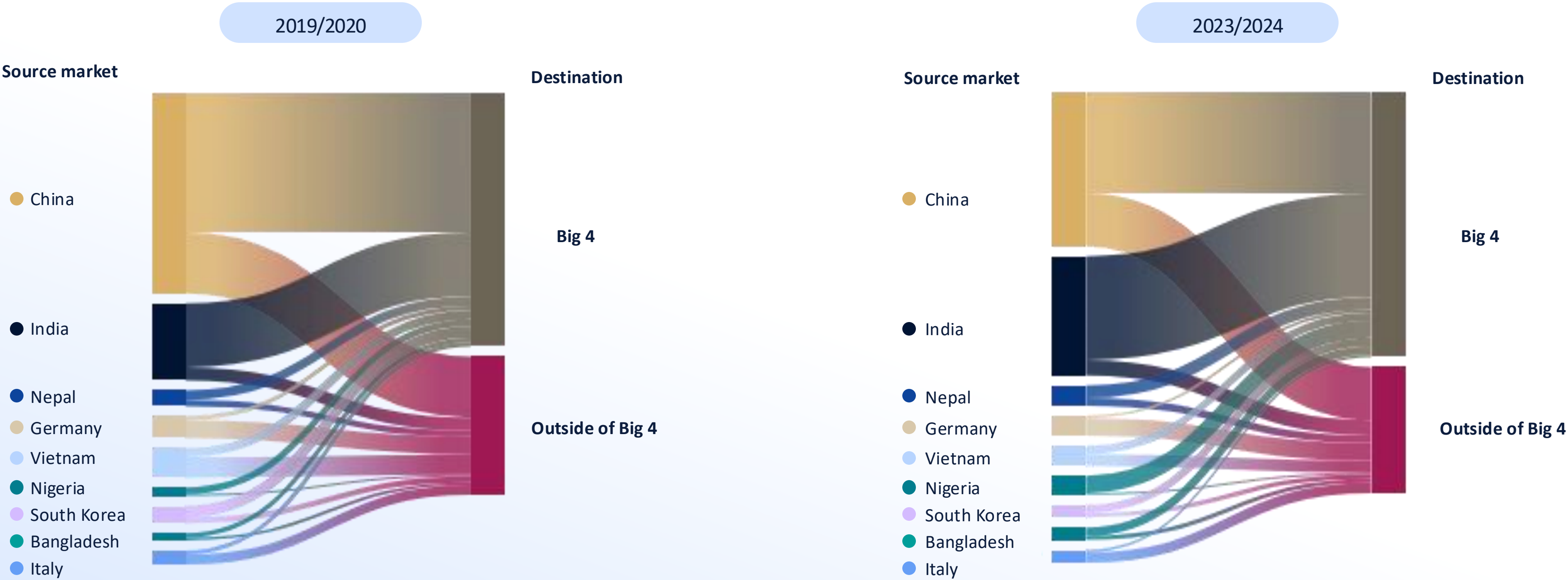
Source: Statistics Austria, 2024; Statistics Finland, 2024; Campus France, 2024; Wissenschaft weltoffen, 2024; Higher Education Authority Ireland, 2024; Ministry of University and Research Italy, 2024; Nuffic, 2025; Polish Science, 2024; Direção de Serviços de Estatísticas da Educação, 2024; Ministerio de Ciencia, Innovación y Universidades (SIU), 2023; Federal Statistical Office of Switzerland, 2025; Australian Government Department of Education, 2024; IRCC Canada, 2024; Hong Kong University Grants Committee (UGC), 2024; Japan Student Services Organisation, 2025; Ministry of Higher Education; Education Malaysia Global Services, 2025; Ministry of Education New Zealand, 2025; Korean Educational Statistics Service, 2025; UAE Federal Competitiveness and Statistics Authority, 2024; HESA, 2024; Institute of International Education, 2024

Global perspective: Top 10 source markets globally



Source: Statistics Austria, 2024; Statistics Finland, 2024; Campus France, 2024; Wissenschaft weltoffen, 2024; Higher Education Authority Ireland, 2024; Ministero di University and Research Italy, 2024; Nuffic, 2025; Polish Science, 2024; Direção de Serviços de Estatísticas da Educação, 2024; Ministerio de Ciencia, Innovación y Universidades (SIU), 2023; Federal Statistical Office of Switzerland, 2025; Australian Government Department of Education, 2024; IRCC Canada, 2024; Hong Kong University Grants Committee (UGC), 2024; Japan Student Services Organisation, 2025; Ministry of Higher Education; Education Malaysia Global Services, 2025; Ministry of Education New Zealand, 2025; Korean Educational Statistics Service, 2025; UAE Federal Competitiveness and Statistics Authority, 2024; HESA, 2024; Institute of International Education, 2024

Global perspective: Top 10 source markets performance



Global perspective: Change in top source markets (2019–2023)

Percentage growth or decline in enrolments by source market–destination pair

		Study destination																	
		Strong growth (+50% or more)					Moderate growth (+1–49%)					Decline (-1 - -29%)				Strong decline (–30% and more)			
Source market		BIG 4					Europe						Asia						
		Australia	Canada	UK	USA	New Zealand	France	Germany	Ireland	Italy	Netherlands	Portugal	Hong Kong	South Korea	Malaysia	Japan			
	Bangladesh	+59%	+103%	+282%	+99%	-43%	~+11%	+66%	+55%	+182%	+284%	+81%	+97%	+74%	+52%	+51%			
	Brazil	-18%	+21%	-17%	0%	-6%	-98%	+68%	-95%	-68%	+163%	-99%	+>200%	+>200%	n/a	+>200%			
	China	-13%	-18%	+6%	-26%	-11%	-9%	-5%	+10%	+9%	+33%	+63%	+38%	-15%	+119%	-7%			
	France	-21%	+4%	-38%	-4%	-21%	n/a	-1%	+47%	+37%	+57%	+91%	+25%	+130%	0%	+29%			
	Germany	-14%	-11%	-45%	0%	-10%	0%	n/a	+58%	+40%	-7%	+128%	-14%	>200%	n/a	+35%			
	India	-8%	+92%	+200%	+111%	-48%	+15%	+99%	+42%	+11%	+10%	+109%	-51%	+33%	+8%	-14%			
	Iran	+11%	+101%	+185%	+17%	-17%	~+14%	+62%	+135%	+192%	+>200%	+62%	+35%	+65%	n/a	n/a			
	Italy	-18%	+8%	-51%	+8%	-27%	+31%	+16%	+68%	n/a	+48%	+40%	-16%	+180%	n/a	+10%			
	Morocco	-17%	+51%	+77%	+20%	0%	0%	+28%	+25%	+41%	+54%	+164%	n/a	+195%	n/a	n/a			
	Nepal	+19%	+>200%	+>200%	+28%	-43%	~+16%	+16%	+17%	+148%	+6%	+38%	+10%	+>200%	n/a	+44%			
	Nigeria	+45%	+162%	+>200%	+50%	-26%	+81%	+4%	-8%	+37%	+76%	+332%	-66%	+>200%	-37%	n/a			
	Pakistan	+22%	+89%	+>200%	+38%	-25%	+120%	+66%	+74%	+106%	+14%	+>200%	-10%	-38%	-6%	+91%			
	South Korea	-14%	+5%	-9%	-15%	-20%	+18%	+1%	-5%	+43%	0%	+67%	-23%	n/a	+7%	-18%			
	Vietnam	+11%	+40%	+3%	-12%	-10%	-7%	-1%	+37%	-15%	+19%	+60%	+72%	+108%	n/a	-50%			
United States	-16%	-10%	-100%	n/a	-26%	+4%	-4%	+18%	+52%	+38%	+23%	-33%	+15%	n/a	+36%				

Q3 2025

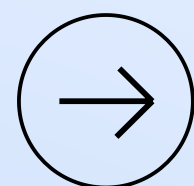
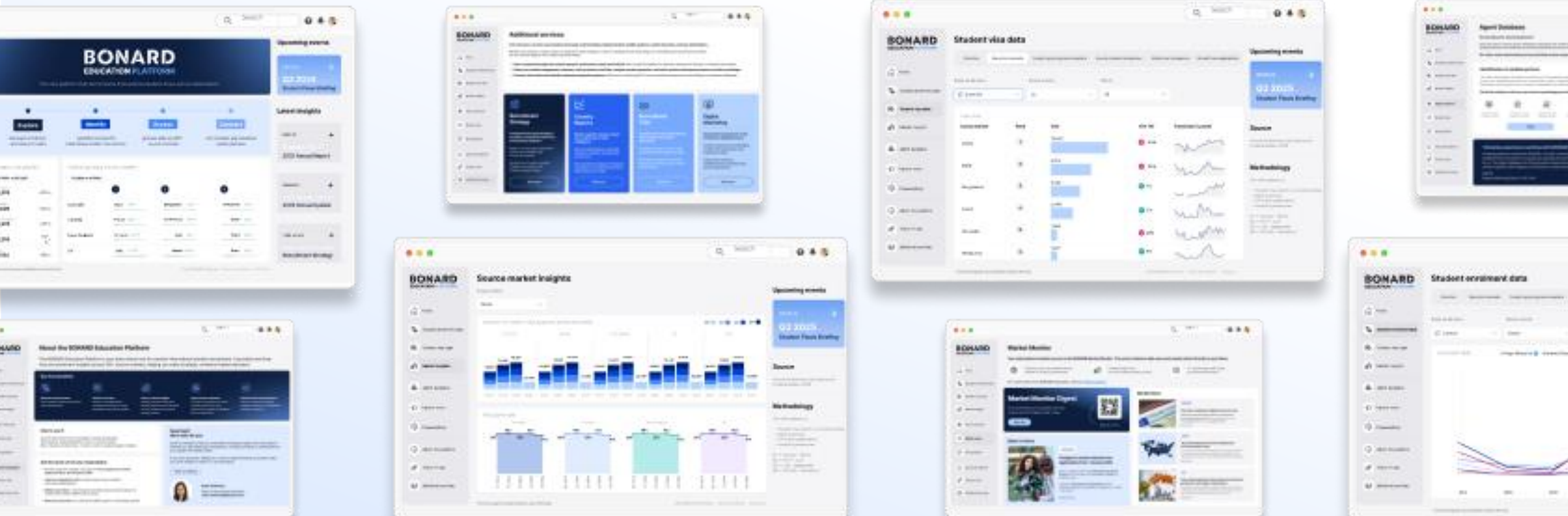
Summary and Outlook

- Protectionist policies in traditional English-speaking destinations are reshaping student flows.
- By 2024/25, **combined European and Asian enrollments** are predicted to **surpass the Big Four**.
- **Applications to the Big Four and New Zealand** are forecast to **fall 17% in 2025** (~1.02 m), mainly due to the US and Canada.
- Beyond 2025, volumes may stabilize with modest growth — depending on UK and US policies.
- A negative scenario could see a further 10% drop in 2026, while favorable conditions could drive up to 16% growth.
- **USA** - Ongoing decline from restrictive measures, expected to ease by 2026.
- **Australia** - Regulatory and cost pressures persist; 2026 policy changes and a +9% cap unlikely to offset demand declines.
- **Canada** - Reaching only ~20% of 2025 cap; gradual recovery expected in 2026–27 with new streamlined measures.
- **New Zealand** - New international education strategy and simplified visas set to boost growth over the next two years.



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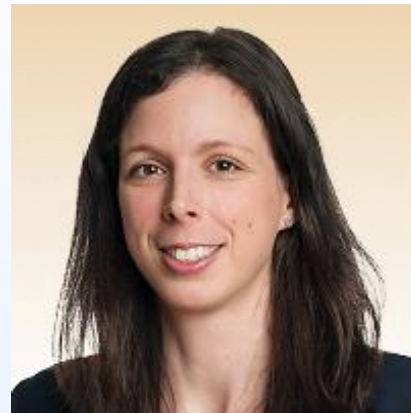


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China Branch Director



Su Su

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