



# Shifting International Student Mobility Trends for 2025



[www.emerging-strategy.com](http://www.emerging-strategy.com)  
[info@emerging-strategy.com](mailto:info@emerging-strategy.com)  
Ph: +1 (202) 386 6303  
[Schedule a Meeting with Our Team](#)



## Executive Summary

Recent policy shifts in traditional English-speaking countries—namely the United States, Canada, the United Kingdom, and Australia—are reshaping global student mobility patterns. Stricter immigration and visa regulations in these nations have prompted international students to seek alternative study destinations that offer quality education, affordability, and favorable visa policies.

Emerging destinations such as Germany, France, the Netherlands, Malaysia, Singapore, Japan, and New Zealand are experiencing increased interest from students worldwide. This trend necessitates strategic adaptations from educational institutions, businesses, and policymakers to accommodate and support the evolving landscape of international education.



# Introduction

International students have long been a cornerstone of higher education institutions in the U.S., Canada, the U.K., and Australia. Beyond academia, their presence significantly contributes to local economies, cultural diversity, and the global talent pool. However, recent policy shifts in these countries are poised to alter traditional student flows, necessitating a comprehensive understanding of these changes and their broader implications.

## Key Developments Shaping Global Student Mobility

### United States: Potential Return to Restrictive Immigration Policies

During the Trump administration (2017–2021), the U.S. implemented stringent immigration policies, including travel bans affecting several Muslim-majority countries and increased scrutiny of visa applications.

These measures led to a 6.6% decline in new international student enrollment between the 2017–2018 academic year and a further 0.9% decrease in 2018–2019. The number of student visas issued to individuals from countries listed in Executive Order No. 13769 saw significant reductions; for instance, visas for students from Iraq, Libya, Somalia, and Yemen each decreased by more than 50% during this period.

Visa restrictions, extended processing times, and restrictions specific to students from non-white and Muslim-majority countries contributed were not the only barriers. Uncertainty surrounding the Optional Practical Training (OPT) program—a key incentive for STEM students to study in the U.S.—added to students' reluctance from a variety of countries.

Given the U.S.'s longstanding position as a top study destination, a return to any combination of these policies may reverberate throughout the international student ecosystem.

### Canada: Implementing Caps on International Student Visas

Canada has experienced a surge in international student enrollment, with over 1 million international students by the end of 2023—a 29% increase from the previous year.

However, concerns over housing shortages and infrastructure strain have prompted the government to implement a two-year cap on study permit applications, limiting approvals to approximately 360,000 annually—a 35% decrease compared to 2023.

### United Kingdom: Restricting Dependent Visas for International Students

In 2024, the U.K. government restricted the ability of international students in non-research programs to bring family members, aiming to reduce net migration.

This policy change affects students from countries where family accompaniment is culturally significant, potentially making the U.K. a less attractive destination for these individuals. Universities may experience a decline in applications from regions where family accompaniment is a priority, such as South Asia and Africa.

### Australia: Capping International Student Numbers

Australia announced a significant reduction in the number of international students as part of a broader strategy to control immigration and manage housing market pressures. Starting in 2025, the cap on new international student visas will be set at 270,000, a reduction from 402,600 in 2023.



# Emerging Destinations & Their Appeal

The tightening of immigration and visa policies in traditional English-speaking destinations is prompting international students to consider alternative study locations.

## Europe



**Germany:** Known for its high-quality education system and tuition-free public universities, Germany is becoming increasingly attractive to international students, particularly from China and India. The country hosted over 376,000 international students in 2021, making it one of the top destinations globally. The country's diverse range of English-taught programs and robust economy provide ample opportunities for students seeking quality education and career prospects.



**France:** With a goal to host 500,000 international students by 2027, France is enhancing its appeal through affordable education and a wide array of English-taught programs. In 2024, over 400,000 international students chose France for their education.



**Netherlands:** Offering numerous programs in English and a multicultural environment, the Netherlands is attracting students seeking quality education in Europe. The number of international students in Dutch universities doubled in ten years, from just under 54,000 in 2011 to around 122,300 in 2022.

## Asia Pacific



**Malaysia:** Emerging as a prominent destination for students from China, India, and neighboring Southeast Asian countries. Affordable tuition fees, a diverse cultural environment, the presence of international branch campuses and a variety of English-taught programs make it an attractive alternative. In 2023, Malaysia hosted approximately 104,315 international students, with 43,952 enrolled in public universities and 60,363 in private institutions. The Malaysian government's proactive policies aim to increase this number to 250,000 by 2025.



**Singapore:** As a global education hub, Singapore offers a strategic location in Asia, high-quality institutions, and strong industry connections, making it attractive to students from neighboring countries. The National University of Singapore (NUS) and Nanyang Technological University (NTU), consistently rank among the top globally, enhancing their appeal to foreign students. As of 2020, international students constituted less than 10% of enrollments in polytechnics and autonomous universities.



**Japan:** Becoming a preferred destination for international students, particularly from China, Vietnam, Nepal, Korea, and Indonesia. The country's high-quality education system and advanced technological environment make it an attractive option. As of May 2023, Japan hosted approximately 279,274 international students, marking a 20.8% increase from the previous year. The Japanese government has set ambitious targets to further boost these numbers, aiming to host 400,000 international students by 2033. This commitment is reflected in various initiatives, including the expansion of English-taught programs and the enhancement of support services for international students.



**New Zealand:** With a reputation for safety and high-quality education, New Zealand is appealing to students from Asia and the Pacific regions. The country has implemented policies to attract international students, including post-study work opportunities.

## Regional Shifts in Outbound Student Interest

The tightening of immigration and visa policies in traditional English-speaking countries has prompted international students to explore alternative study destinations. This shift is influenced by factors such as proximity, affordability, cultural ties, and favorable visa regulations.

### Asian Students

Students from China, India, and Southeast Asia are increasingly considering regional options that offer quality education closer to home.

- **China:** Chinese students are exploring destinations like Japan, South Korea, and Malaysia.
- **India:** Indian students are showing interest in countries such as Germany and the Netherlands, attracted by strong engineering and technical programs, as well as favorable post-study work opportunities.
- **Southeast Asia:** Students from countries like Vietnam and Indonesia are considering Singapore and Malaysia for their higher education, drawn by cultural similarities and geographic proximity.

### African Students

With restrictions in traditional destinations, African students are exploring options in countries that offer affordable education and have established scholarship programs targeting African nations.

- **Turkey:** Turkey has become an attractive destination for African students, offering numerous scholarships and affordable tuition fees. The country has seen a significant increase in the number of African students enrolling in its universities over the past decade.
- **Malaysia:** Malaysia's affordable education and diverse cultural environment make it appealing to African students. The government's proactive policies aim to increase the number of international students to 250,000 by 2025.

### Latin American Students

Students from this region are looking towards countries with linguistic similarities and cultural ties, as well as favorable visa policies for students.

- **Spain:** Spain remains a popular destination for Latin American students, offering a shared language and cultural heritage. The country has implemented policies to attract international students, including streamlined visa processes and scholarships.
- **Portugal:** Portugal has also seen an increase in Latin American students, particularly from Brazil, due to linguistic similarities and strong bilateral relations. The country offers various programs in Portuguese and has favorable visa policies for students.



# Implications for Emerging Destinations

As international students increasingly consider alternative study destinations due to stricter immigration policies in traditional English-speaking countries, emerging destinations face several critical implications:

## Capacity & Infrastructure

- **Educational Facilities:** A surge in international student enrollments necessitates the expansion of academic facilities, including lecture halls, laboratories, and libraries, to prevent overcrowding and maintain a conducive learning environment.
- **Housing and Accommodation:** The influx of students can strain existing housing markets, leading to shortages and increased rental prices. Investing in student housing projects and collaborating with private developers can alleviate these pressures.
- **Transportation and Amenities:** Enhanced public transportation and student-centric amenities, such as healthcare services and recreational facilities, are essential to support the growing student population.

## Cultural Integration

- **Orientation Programs:** Comprehensive orientation sessions that introduce international students to local customs, academic expectations, and available support services can facilitate smoother transitions.
- **Language Support:** Offering language courses and communication workshops can help non-native speakers overcome language barriers, promoting better integration both academically and socially.
- **Community Engagement:** Encouraging interactions between international students and local communities through cultural events, mentorship programs, and volunteer opportunities fosters mutual understanding and inclusivity.

## Quality Assurance

- **Accreditation and Standards:** Implementing rigorous accreditation processes ensures that educational institutions meet high standards, thereby maintaining the country's reputation as a quality education provider.
- **Faculty Development:** Investing in faculty training and development programs can enhance teaching quality, ensuring that educators are equipped to address the diverse needs of an international student body.
- **Feedback Mechanisms:** Establishing channels for students to provide feedback on their academic and social experiences allows institutions to make informed improvements, thereby enhancing overall satisfaction and retention rates.

By proactively addressing these areas, emerging study destinations can effectively manage the challenges associated with increased international student enrollments, ensuring sustainable growth and a positive experience for all stakeholders.

# Conclusion

The global education sector is undergoing a significant transformation driven by policy changes in traditional host countries. Emerging study destinations are presented with both opportunities and challenges as they attract a growing number of international students. To capitalize on this shift, these countries must invest in expanding educational infrastructure, enhancing cultural integration initiatives, and maintaining high-quality academic standards. By proactively addressing these areas, emerging destinations can establish themselves as attractive alternatives for international students, thereby enriching their educational environments and contributing to global academic collaboration.

## Winners & Losers

Winners	Reason for Increased Attractiveness
Germany	High-quality education system, tuition-free public universities, diverse range of English-taught programs, robust economy, and favorable post-study work opportunities.
France	Affordable education, wide array of English-taught programs, cultural appeal, and government initiatives aiming to host 500,000 international students by 2027.
Netherlands	Numerous English-taught programs, multicultural environment, and strong emphasis on research and innovation.
Malaysia	Affordable tuition fees, diverse cultural environment, presence of international branch campuses, variety of English-taught programs, and government policies targeting 250,000 international students by 2025.
Singapore	Strategic location in Asia, high-quality institutions like NUS and NTU, strong industry connections, and a global education hub reputation.
Japan	High-quality education system, advanced technological environment, and government initiatives aiming to host 400,000 international students by 2033.
New Zealand	Reputation for safety, high-quality education, and policies offering post-study work opportunities.
Losers	Reason for Decreased Attractiveness
United States	Potential return to restrictive immigration policies, including travel bans and increased visa scrutiny, leading to declines in new international student enrollment.
Canada	Implementation of caps on international student visas due to housing shortages and infrastructure strain, limiting approvals and reducing attractiveness.
United Kingdom	Restrictions on dependent visas for international students in non-research programs, affecting students from regions where family accompaniment is culturally significant.
Australia	Capping of international student numbers as part of a strategy to control immigration and manage housing market pressures, reducing new international student visas.