2026 ANNUAL REPORT

The State of International Education Worldwide

A data-driven global review of international education — student mobility, the destination shake-up, the international-schools sector, curricula, visas, the student experience, technology, the market, and the road to 2027.

K12 Academics — helping families Find Your Community! since 2004

6.9M
Internationally mobile students

269M
Tertiary students worldwide

14,833
K-12 international schools

$60.9B
International-school fee revenue

EXECUTIVE SUMMARY

A global market at a record high — and mid-reset

International education has never been bigger: ~6.9 million students cross borders for university, another ~6.9 million attend some 14,800 international schools, and demand is projected to push mobility past ten million by 2030. Yet the traditional “Big Four” destinations are tightening visas simultaneously, students increasingly stay within their regions, and new hubs are rising. A data-driven industry analysis, not a political one.

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Mobile students

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Int'l schools

$60.9B
School fee revenue

Biggest trends

- Global mobility heading toward 10 million by 2030.
- The “Big Four” destinations tightening visas at once.
- Students increasingly study within their own region.
- International K-12 schools keep growing — schools, students & fees.

Key findings

- ~6.9M internationally mobile students — tripled in two decades.
- ~14,800 international schools enroll ~6.9M students ($60.9B fees).
- US F-1 visa refusals hit a decade high; new visas fell ~36%.
- Emerging destinations (Germany, Türkiye, Japan, Gulf) gaining.

Major challenges

- Visa caps & policy volatility across top destinations.
- Affordability, currency & cost-of-living pressure.
- Student wellbeing, housing & integration.
- Geopolitics & shifting perceptions of safety.

Opportunities

- Emerging destinations & intra-regional hubs.
- AI, translation & digital credentials lowering barriers.
- Branch campuses & transnational partnerships.
- Strong, durable demand for a global education.

The scale of a truly worldwide sector

Higher education has more than doubled in twenty years to ~269 million students worldwide, and international education is a large, high-value slice — spanning cross-border university study, a booming international-schools sector, branch campuses, study abroad, and language education. It is an academic, economic, and soft-power engine for sending and receiving countries alike.

The sector at a glance

Scale & value

269M — **tertiary students** worldwide — doubled in two decades.

6.9M — **internationally mobile** university students.

14,800 — **K-12 international schools** enrolling ~6.9M students.

Value — hundreds of billions in **tuition, fees & local spending**.

Why it matters to everyone

Who benefits from mobility

- **Talent & skills**
- **Tuition & exports**
- **Research**
- **Soft power**
- **Diaspora**
- **Cultural exchange**

Sending countries build human capital; host countries gain **talent, revenue & influence** — so policy shifts ripple worldwide.

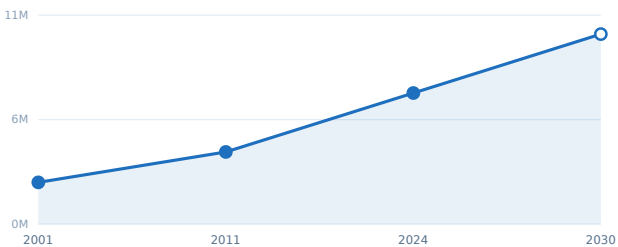
SECTION 02 — GLOBAL STUDENT MOBILITY

Record numbers — flowing in new directions

The number of students studying outside their home country has tripled since 2001 and is on track to exceed ten million by 2030. The United States remains the largest single destination, but growth is diversifying: students from Asia increasingly study within their own region, and emerging hubs are gaining share.

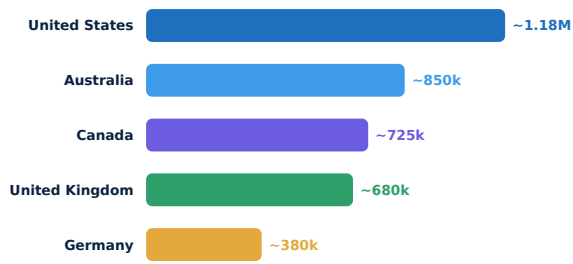
Global mobility keeps climbing

Internationally mobile students (millions)



The leading destinations

International students hosted (approx.)



Where students come from

Top sending regions

China still the **largest source** — over a million abroad.

India surging — **now #1** in several destinations.

Asia supplies the **most mobile students** globally.

The shape of demand

Mobility trends

3× mobility has **tripled since 2001**.

10M projected by **2030** on current trends.

Region **intra-regional** study rising fast, esp. East Asia.

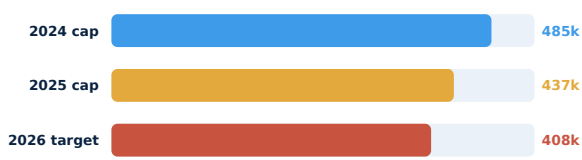
SECTION 03 — THE DESTINATION SHAKE-UP

The “Big Four” tighten — all at once

The most consequential shift of the year is on the destination side. For the first time, the four largest English-speaking destinations are all restricting international enrollment at once — through caps, higher fees, and dependant limits — redirecting students toward emerging hubs. Canada's study-permit cap is the clearest example.

Canada is capping study permits

Study-permit cap / target



Four destinations, one direction

Policy tightening in 2024-26

Canada — **permit cap** — holders fell from ~1M to ~725k.

UK — most students **cannot bring dependants** (since 2024).

Australia — **higher visa fees & enrollment caps**.

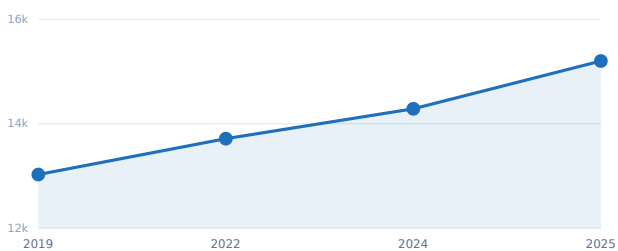
US — **F-1 refusals at a decade high**; new visas down sharply.

A booming, $60-billion K-12 market

Parallel to university mobility, the K-12 international-schools sector is expanding fast. English-medium international schools now number ~14,800, enrolling about 6.9 million students and employing over 660,000 teachers, with total fee income above $60 billion — growth driven by local families seeking a global, English-language education.

International schools keep opening

Number of K-12 international schools



The sector by the numbers

Schools, students & fees

14,800 — **international schools** — hundreds added each year.

6.9M — **students** (ages 3-18); staff over 660,000.

$60.9B — **annual fee revenue** — up ~$9B over five years.

Local — most demand now comes from **local, not expat**, families.

One student, sometimes two diplomas

The curriculum landscape is plural and increasingly blended. The International Baccalaureate and Cambridge programs are the most widely offered, followed by British and American curricula, with French, German, Australian, and Canadian options in specific markets. Around two-thirds of new schools now open with hybrid curricula, and dual-diploma and dual-language programs are rising.

The curriculum menu

What international schools teach

IB · Cambridge · British · American & AP · French · German · Dual-diploma · Dual-language

Over three-quarters of schools offer at least one of the five major curricula — and many offer **more than one**.

Curriculum trends

What is growing

IB / CAM — the **two most widely offered** frameworks worldwide.

Hybrid — **~two-thirds of new schools** open with blended curricula.

Dual — **dual-diploma & dual-language** programs expanding.

Local — governments increasingly **require some national curriculum**.

Campuses without borders

Universities pursue international students not only by recruiting them to campus but by going to them — through branch campuses, joint and double degrees, and academic partnerships. Meanwhile outbound study abroad is recovering: roughly 280,000 U.S. students study abroad each year, still climbing back toward the pre-pandemic peak of about 350,000.

Global higher education

Enrollment & delivery

1.18M — **international students in the US** — a record; ~6% of enrollment.

Branch — **international branch campuses** bring degrees to students.

Joint — **joint & double degrees** & partnerships multiply.

Region — **regional hubs** (Gulf, SE Asia) build capacity fast.

Study abroad

Outbound mobility

~280k — **US students study abroad** annually — recovering.

~350k — the **pre-pandemic peak** it is climbing toward.

Short — **short-term & faculty-led** programs dominate.

Purpose — **internships, research & service** learning growing.

How students and schools find each other

International recruitment blends agents, digital marketing, virtual and in-person fairs, and increasingly AI — while admissions grapple with credential evaluation, GPA conversion, and English-proficiency testing. The English-test market itself is shifting as the Duolingo English Test gains ground on the long-dominant TOEFL and IELTS.

Recruitment & admissions

Finding & evaluating students

Agents — **education agents** remain a primary global channel.

Digital — **virtual fairs, search & social** increasingly lead.

AI — **AI** now supports outreach, matching & support.

Credential — **credential evaluation & GPA conversion** stay core challenges.

English proficiency

A shifting test market

TOEFL · **IELTS** · **Duolingo English Test** · **PTE** · **Cambridge English**

The **Duolingo English Test** has grown rapidly — cheaper and at-home — challenging the **TOEFL/IELTS** duopoly.

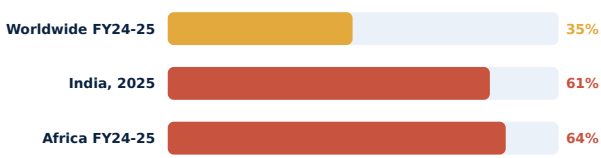
SECTION 08 — IMMIGRATION & VISAS

The single biggest variable in the system

Nothing shapes international education more than visa policy. In the United States, F-1 refusal rates have reached their highest in a decade — with especially steep rates for applicants from India and Africa — and new student-visa issuance fell sharply year over year. Work rights after graduation, processing times, and dependant rules increasingly decide where students go.

US student-visa refusals are rising

F-1 refusal rate (selected)



The visa environment

What is changing

Decade high — US **F-1 refusals** at their highest in ten years.

−36% — **new US student visas** issued fell sharply YoY.

Work — **post-study work rights** increasingly drive choice.

Volatile — **fast-changing rules** across all major destinations.

Getting in is only half the journey

Recruiting students is one thing; supporting them is another. Housing shortages, cultural adjustment, mental health, and safety now weigh heavily in destination choice, and institutions that invest in orientation, advising, community, and wellbeing see stronger satisfaction and retention. Student wellbeing has become central to international-school strategy too.

What shapes the experience

Support & belonging

Housing — **affordable housing** is a top stressor in many cities.

Wellbeing — **mental-health support** is now central to strategy.

Belong — **orientation, advising & community** drive retention.

Safety — **safety & perception** increasingly sway destination choice.

What students value on the ground

Beyond the classroom

- **Housing**
- **Orientation**
- **Advising**
- **Mental health**
- **Community**
- **Inclusion**
- **Safety**
- **Careers**

Experience and outcomes — not just rankings — increasingly determine **where students choose to go**.

AI and translation are lowering the barriers

Technology is reshaping every stage of the international journey. AI supports tutoring, admissions, counseling, and translation; digital and blockchain credentials speed recognition across borders; and virtual classrooms enable cross-border enrollment. Alongside it, language education — ESL/EFL, immersion, and certification — remains foundational to access.

Technology in international ed

From AI to credentials

AI — **tutoring, admissions, counseling & translation**.

Translate — **real-time translation** lowers the language barrier.

Credentials — **digital & blockchain** credentials speed recognition.

Virtual — **online & hybrid** models widen cross-border access.

Language education

The foundation of access

- **ESL / EFL**
- **English immersion**
- **Bilingual**
- **Multilingual**
- **Certifications**
- **Exchanges**

English-language learning remains the **gateway** to most international study — and a major market in its own right.

Following the money

International education is a major global industry. International-school fees alone exceed $60 billion a year, cross-border tuition adds hundreds of billions more, and the sector attracts steady EdTech investment, new providers, and consolidation. Currency swings, cost-of-living, and scholarships all shape where families can afford to go.

The economics

Cost, funding & market

$60.9B — **international-school fee revenue** — and rising.

Aid — **scholarships & grants** widen (or gate) access.

FX — **currency & cost-of-living** reshape affordability.

Invest — steady **EdTech investment, M&A & new providers**.

Market forces to watch

Industry dynamics

- School-group expansion
- EdTech investment
- M&A
- Emerging markets
- New providers
- Branch campuses

Capital is flowing toward **emerging markets & scalable models** — even as policy adds uncertainty.

The same forces, very different local weather

Global trends land differently by region. Below is a high-level read of where mobility, policy, and growth are heading across the major world regions — a starting point, not a substitute for country-level analysis.

Americas, Europe & Oceania

Established destinations, new rules

N. America — **US & Canada** tightening visas; still huge draws.

UK & Ireland — **dependant limits & fee VAT**; demand cooling.

Europe — **Germany & others** gaining on affordability & work rights.

Oceania — **Australia & NZ** managing intake via fees & caps.

Asia, Middle East & Africa

The fastest-moving regions

East Asia — **intra-regional study** surging; Japan & others rising.

South Asia — **India** a top source — and building capacity at home.

Middle East — **Gulf hubs** expanding branch campuses & schools.

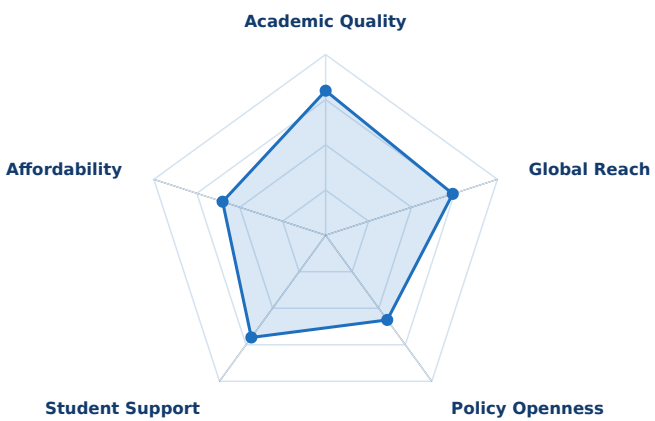
Africa — **fast-growing demand**; access & visa refusals a challenge.

A K12 Academics framework for comparing destinations

Rankings focus on individual universities; families and institutions also need to weigh whole destinations. The Index profiles a destination across five weighted pillars — so students, schools, and policymakers can compare not just prestige, but openness, support, and value.

Five-pillar profile

Illustrative — weights sum to 100



Academic Quality 25%
Institutions, curricula & outcomes.

Global Reach & Mobility 20%
Enrollment, partnerships & recognition.

Policy & Visa Openness 20%
Visas, work rights & stability.

Student Support 15%
Housing, wellbeing & belonging.

Affordability & Value 20%
Cost, aid & return on investment.

SECTION 14 — THE 2027 OUTLOOK

Two forces, and a to-do list

Toward 2027, international education keeps growing but redistributes: demand rises and diversifies, AI and digital credentials lower barriers, and emerging destinations gain — while visa policy, affordability, and geopolitics constrain the traditional leaders. The winners will be the destinations and institutions that pair openness with genuine student support.

↗ Tailwinds

Rising, diversifying demand toward 10M by 2030.

Emerging destinations & regional hubs gaining.

AI, translation & digital credentials lowering barriers.

Branch campuses & partnerships expanding access.

↓ Headwinds

Visa caps & policy volatility in top destinations.

Affordability, FX & cost-of-living pressure.

Housing & wellbeing strain on the experience.

Geopolitics reshaping flows & perceptions.

For institutions

- Diversify recruitment markets
- Invest in support & housing
- Build partnerships & branch models

For governments

- Balance controls with competitiveness
- Offer clear, stable rules
- Streamline credential recognition

For students & families

- Weigh visas, work rights & cost
- Consider emerging destinations
- Plan English testing & credentials early

DATA & METHODOLOGY

Methodology & sources

This report synthesizes the most recent publicly available data from international organizations, national agencies, and sector researchers, current as of publication in 2026 — a data-driven industry analysis, not a political one.

Data sources

- UNESCO Institute for Statistics & OECD — global mobility
- IIE Open Doors & Project Atlas — enrollment
- ISC Research — international-schools market
- IRCC, UK Home Office, Australian Dept. of Education — visas
- IB & Cambridge International — curriculum
- ICEF Monitor & migration data portals
- K12 Academics directory analytics

A data-driven industry analysis, not a political one. Definitions of “international student” vary by source; figures reflect the most recent data available at publication in 2026; national data are published on different timelines; percentages rounded.

Contact K12 Academics

Questions about this report, or about listing your school or program? We'd love to hear from you.

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