

International Education Market Forecasts to 2034 – Global Analysis By Education Level (Primary Education, Secondary Education, Higher Education, Vocational Education, and Professional Education), Learning Mode (On-Campus, Online, and Hybrid), Program Type, Student Type, Funding Source, and By Geography

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Abstracts

According to Statistics MRC, the Global International Education Market is accounted for \$228.1 billion in 2026 and is expected to reach \$419.2 billion by 2034 growing at a CAGR of 7.9% during the forecast period. International education encompasses educational programs and services delivered across national borders, including on-campus, online, and hybrid learning modes. This market includes degree programs, diploma programs, certificate programs, exchange programs, and language programs designed for students seeking education outside their home countries or pursuing internationally recognized qualifications. Globalization of education, increasing student mobility, growing demand for cross-cultural competencies, and expanding digital learning platforms are key drivers of market expansion.

Market Dynamics:

Driver:

Growing student mobility and demand for global qualifications

Increasing student mobility and rising demand for internationally recognized qualifications are primary drivers for the international education market. Students from

developing countries are seeking higher education opportunities abroad, attracted by quality, prestige, and career prospects. The growing middle class in emerging economies has enabled more families to afford international education. Employers increasingly value international experience and cross-cultural competencies, driving demand for globally oriented programs. Government scholarship programs and international education initiatives support student mobility. As globalization continues and borders become more porous for education, international student enrollment continues growing worldwide.

Restraint:

High costs and affordability barriers

The significant cost of international education, including tuition, living expenses, and travel, represents a major restraint for market growth. International students face substantially higher tuition fees compared to domestic students in many countries. Living costs in host countries, particularly in major urban centers, add significant financial burden. Currency fluctuations and inflation affect affordability for international students. Visa requirements, travel restrictions, and insurance costs further increase expenses. These financial barriers limit international education access to wealthy families or scholarship recipients, constraining market expansion, particularly from developing countries with limited financial resources.

Opportunity:

Expansion of online and hybrid international education programs

The growth of online and hybrid learning modes presents significant opportunities for international education market expansion. Digital platforms enable students to access international qualifications without relocating, reducing cost barriers. Online programs offer flexibility, allowing students to balance education with work and family commitments. Hybrid models combining online learning with short-term on-campus experiences provide immersive components while managing costs. Cross-border online education partnerships are expanding program availability across regions. As technology advances and online education gains credibility, digital international education reaches previously inaccessible student populations, driving significant market growth.

Threat:

Geopolitical tensions and restrictive immigration policies

Geopolitical tensions and changing immigration policies in major host countries pose significant threats to the international education market. Travel restrictions, visa processing delays, and policy changes affecting international students create uncertainty. Tensions between major economies may affect student flows and research collaborations. Post-study work rights and immigration pathways influence student destination choices. The pandemic highlighted vulnerability of international education to travel restrictions. Changes in government policies regarding international students, including work rights and permanent residency pathways, affect destination appeal. These uncertainties may reshape international student flows, affecting market distribution and growth.

Covid-19 Impact:

The COVID-19 pandemic profoundly disrupted international education, with border closures, travel restrictions, and campus shutdowns severely impacting student mobility. International student enrollments declined significantly in major host countries. The crisis accelerated online learning adoption, with many institutions offering remote programs to international students. Student visa processing delays affected enrollment timelines. Financial pressures affected some students' ability to continue international education. Post-pandemic recovery has been uneven, with some destinations recovering faster than others. The crisis permanently accelerated digital delivery models and may reshape international student mobility patterns long-term.

The On-Campus segment is expected to be the largest during the forecast period

The On-Campus segment is expected to account for the largest market share during the forecast period, driven by the traditional model of international education requiring physical attendance at host institutions. On-campus programs offer immersive cultural experiences, face-to-face interaction with faculty and peers, and access to campus facilities and resources. The segment includes universities, colleges, and language schools hosting international students across major destinations. Study abroad and exchange programs rely on on-campus participation. While online learning has grown, the traditional on-campus experience remains central to international education, with students valuing cultural immersion and direct engagement. This established model ensures the segment maintains dominant market position.

The Degree Programs segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Degree Programs segment is predicted to witness the highest growth rate, fueled by increasing demand for internationally recognized bachelor's, master's, and doctoral qualifications. Degree programs offer comprehensive education and credentials valued in global job markets. The expansion of English-medium degree programs in non-English speaking countries increases accessibility. Growing numbers of students from emerging economies are pursuing undergraduate and graduate degrees abroad, driven by career aspirations and limited domestic options. International partnerships enabling dual and joint degrees are expanding offerings, making degree programs the fastest-growing segment.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, led by the United States as the top destination for international students worldwide. The region offers world-class universities with strong global reputations, extensive program variety, and robust research opportunities. The US and Canada have established international education infrastructure, supporting student services, housing, and career support. Post-study work opportunities, including Optional Practical Training in the US and Post-Graduation Work Permits in Canada, enhance destination appeal. Strong institutional commitment to internationalization and diverse program offerings ensure North America maintains its dominant market position.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by the growing number of students seeking international education within the region and the expansion of host countries including Australia, Singapore, Malaysia, Japan, and South Korea. Increasing wealth and educational aspirations in countries across the region are driving demand for international qualifications. Asia-Pacific countries are investing in higher education infrastructure and internationalization to attract regional and global students. Government initiatives promoting international education and scholarship programs support growth. The region's economic dynamism and cultural diversity make it an increasingly attractive destination, delivering the fastest market growth globally.

Key players in the market

Some of the key players in International Education Market include IDP Education Limited, Navitas Limited, Study Group, Kaplan, Inc., INTO University Partnerships, Cambridge Education Group, Oxford International Education Group, Shorelight Education, ApplyBoard Inc., Keystone Education Group, GEDU Global Education, EF Education First, Sannam S4 Group, QS Quacquarelli Symonds Limited, Times Higher Education, Global University Systems, Emeritus Institute of Management Pte. Ltd., and UpGrad Education Private Limited.

Key Developments:

In June 2026, IDP Education announced a \$50 million Australian dollar share buyback program and released optimistic fiscal year 2026 guidance, projecting full-year adjusted EBITDA to reach \$122 million despite challenging regulatory and post-study work policy environments in major Anglophone study destinations.

In May 2026, upGrad secured a ₹360 crore internal funding round led by co-founder Ronnie Screwvala (₹300 crore) alongside pro-rata contributions from existing investors Temasek, IFC, and 360 One, directly funding its strategic expansion into AI-led learning tracks and international study-abroad pathway pipelines.

In January 2026, ApplyBoard published its 2026 International Education Sector Trends to Watch briefing, documenting a massive structural market shift wherein international student inflows are actively moving away from traditional 'Big Four' countries—impacted by tightening visa limits and housing shortages—toward alternative non-Anglophone destinations in Europe and Asia.

Education Levels Covered:

Primary Education

Secondary Education

Higher Education

Vocational Education

Professional Education

Learning Modes Covered:

On-Campus

Online

Hybrid

Program Types Covered:

Degree Programs

Diploma Programs

Certificate Programs

Exchange Programs

Language Programs

Student Types Covered:

Undergraduate Students

Postgraduate Students

Doctoral Students

Professional Learners

Funding Sources Covered:

Self-Funded

Scholarships

Government Sponsored

Institutional Sponsored

Employer Sponsored

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market

estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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