

Recruiting students from Southeast Asia

A country-by-country market view for universities



Publication information

Prepared by Merta

First edition · July 2026

Evidence reviewed to 31 July 2026

Purpose and scope

This report examines Vietnam, Indonesia, Malaysia, Thailand, the Philippines and Singapore as distinct student recruitment markets, with selected context from Myanmar and other Southeast Asian countries. It focuses on university recruitment while flagging when source statistics also include language, school or vocational sectors. It uses evidence available by July 2026.

Research approach

This report synthesises official statistics, government guidance and original research available by its stated evidence date. Sources are numbered in the text and linked at the end. National datasets count different populations and stages; definitions appear beside each comparison. Calculations and Merta recommendations are distinguished from reported results.

This is a selective review of published evidence, not new institutional fieldwork, a systematic review or an evaluation of Merta's products.

Interpretation and use

Findings from one institution or population may not transfer to another. Policy summaries reflect the report date; current official guidance should govern individual cases. Recommendations should be tested against an institution's own applicants, service capacity and outcomes. A cited organisation does not endorse Merta.

Suggested citation

Merta. (2026). Recruiting students from Southeast Asia: A country-by-country market view for universities. First edition.

Cover imagery

Cover and closing-page imagery was generated for this report. The people shown are synthetic; they are not research participants and do not endorse Merta.

© 2026 Merta. Third-party material remains with its rights holders. Further information: merta.ai

Contents

Recruiting students from Southeast Asia

Executive findings.....	4
Define the region and the measures.....	5
How the pattern has changed.....	6
Vietnam: scale with several destination routes.....	7
Indonesia: scholarships and strategic fit.....	8
Malaysia and Singapore: alternatives close to home.....	9
Thailand and the Philippines: avoid a shared script.....	10
What students want and what worries them.....	11
Channels, partnerships and delivery models.....	12
Present position and future scenarios.....	13
Smaller and rapidly changing markets.....	14
A country-by-country decision matrix.....	15
Build a service that can support diversification.....	16
Recruiting priorities for the next intake.....	17
Sources.....	18

Executive findings

Southeast Asia is a region of distinct student markets, not a single recruitment segment. In the US, Vietnam sent **25,584 students in 2024/25**, up 15.9%; Indonesia sent **8,104**, down 2.9%. In Australia's 2025 student-visa count across education sectors, Vietnam accounted for **36,840 students**, the Philippines **34,825**, Indonesia **25,409**, Thailand **19,472**, Malaysia **14,808** and Singapore **7,166**. The US and Australian figures count different populations and should not be ranked against one another. [1,3,4]

Different routes dominate. Vietnam has substantial undergraduate demand in the US and a large multi-sector presence in Australia and Japan. Indonesia combines a large home market with government-funded master's and doctoral pathways. Malaysia has a long history of overseas and transnational provision. The Philippines has strong English-language capability and a sizeable Australian multi-sector population. Thailand and Singapore require different propositions from lower-cost mass-market assumptions. [4,6,8,10,11]

Study choice is specific to country and level. Universities should examine field-by-origin data and their own cohorts rather than apply a regional "business and technology" stereotype. Undergraduate families may need safety and cost information; scholarship-funded postgraduates need eligibility, supervisor and timing clarity; working adults may value flexible delivery. [8,12,16]

Recommendation: set separate plans for at least six priority countries, each with programme fit, credible channel partners, full-cost information, scholarship or financing guidance, and a post-offer service standard. Test new cities and partnerships on enrolled and continuing students. Regional diversification is useful only if the institution develops country-level competence.

The totals are useful starting points, but a university must distinguish sectors and course levels before committing resources. An Australian count can include language or vocational study; a US Open Doors count includes OPT. Neither is a regional annual outflow. A country plan should state which population is relevant to the university's courses and what the latest data cannot show. This methodological discipline is especially important when comparing a large Vietnamese undergraduate route with a smaller Indonesian graduate-scholarship route.

Define the region and the measures

This report focuses on Vietnam, Indonesia, Malaysia, Thailand, the Philippines and Singapore, while noting that Cambodia, Laos, Myanmar, Brunei and Timor-Leste require their own analysis if an institution recruits there. “Southeast Asia” is useful for diplomacy and regional operations, but it hides language, education systems, incomes, scholarship rules and mobility routes that matter to a student decision.

The available statistics answer different questions. Open Doors counts students from an origin on temporary visas in US higher education, including Optional Practical Training. Australia’s PRISMS annual student count covers people studying on student visas across sectors. HESA counts UK higher education enrolments by permanent address. JASSO includes Japanese universities alongside language and professional training institutions. UNESCO’s degree-mobile definition is narrower than many destination administrative datasets. [1,3,5,6,7,19]

Origin	Australia, 2025 students	Distinguishing point
Vietnam	36,840 [1]	Large onshore population; US and Japan also material.
Philippines	34,825 [1]	Broad Australian sector presence; do not infer university-only demand.
Indonesia	25,409 [1]	Public scholarship route important for graduate recruitment.
Thailand	19,472 [1]	Mature links; test course and city segments.
Malaysia	14,808 [1]	Strong transnational and overseas alternatives.
Singapore	7,166 [1]	High-income, selective market with local and offshore options.

Table 1. Australian Department of Education annual individual student count; commencing or continuing in 2025, across education sectors. Not an outbound total for each country.

For planning, add programme-level applications, offers, deposits, visas, arrivals and census enrolments to each national indicator. Treat data gaps explicitly rather than fill them with regional averages.

Grouping countries can also hide risk concentration. A university may report growth from Southeast Asia while nearly all new students come from one programme in one country. Report the six core markets separately, along with an ‘other Southeast Asia’ category that does not mask a fast-changing smaller corridor. Track new entrants and continuing students, because a large stock can temporarily conceal fewer first starts. Use the same intake and census definition for every country in the internal dashboard.

How the pattern has changed

Vietnam provides a clear US time series. Open Doors counted 24,325 Vietnamese students in 2017/18, 23,777 in 2019/20, 20,713 in 2021/22, 22,066 in 2023/24 and 25,584 in 2024/25. Its 2024/25 cohort included 16,156 undergraduates, 4,436 graduate students, 1,363 non-degree students and 3,629 on OPT. Vietnam's recent US increase is therefore not only a graduate story. [4]

Indonesia moved differently in the US: 8,348 in 2023/24 and 8,104 in 2024/25. A small one-year decline in one destination is not evidence that Indonesia's total outbound demand contracted; students may choose other destinations or formats. Australia's 2025 count of 25,409 Indonesians gives another view but has a broader sector definition. [1,3]

Japan is a significant regional alternative. JASSO counted 40,323 Vietnamese students in 2024, up from 36,339 in 2023, and 16,596 from Myanmar, up from 7,773. JASSO includes language schools and professional training; its figures should not be described as university degree enrolment. They show why a university recruiting in Vietnam or Myanmar needs to understand nearby options and language pathways. [6]

Australia's country data show scale across six distinct markets, but its whole-sector total is not a measure of new university entrants. Higher education may grow while English-language or vocational enrolments move differently. Universities should use sector, course and commencement cuts from PRISMS before assigning staff or forecasting revenue. [1,2]

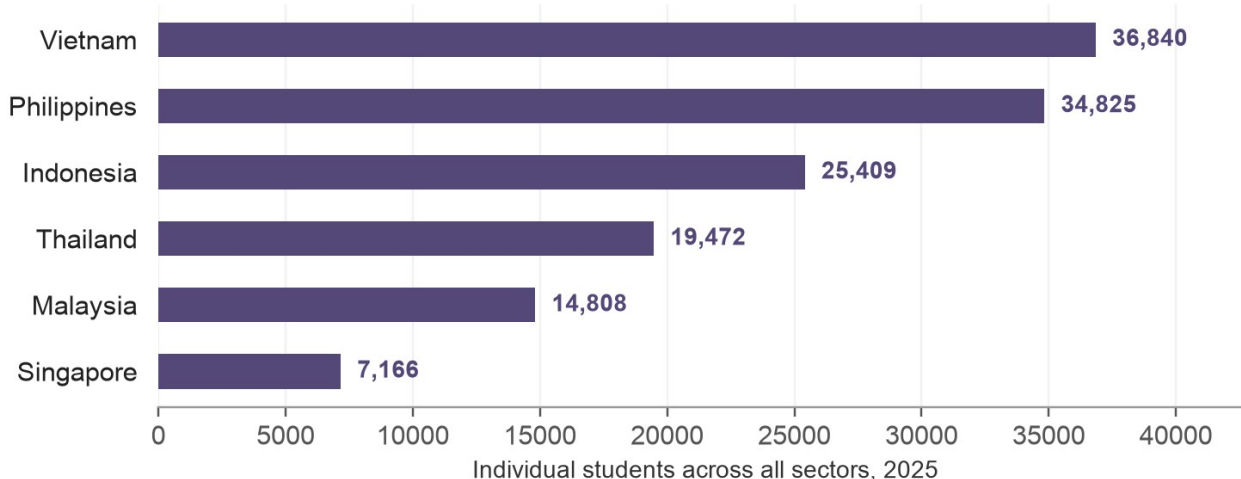


Figure 1. Individual students commencing or continuing on Australian student visas in 2025, across all education sectors. Not a count of university entrants or total outbound students. [1]

Vietnam: scale with several destination routes

Vietnam's US cohort grew 15.9% in 2024/25 to 25,584, the fifth-largest origin in Open Doors. Undergraduates represented 63.1% of that total; graduate students 17.3% and OPT participants 14.2%. This matters for messaging: a US bachelor's route involves families, multi-year cost and academic transition, while a graduate course requires a different evidence base. [3,4]

Australia counted 36,840 Vietnamese students commencing or continuing in 2025 on student visas, across sectors. Japan counted 40,323 in 2024, including language and professional training. Australian universities also delivered 17,697 higher education enrolments offshore in Vietnam in 2024, up from 7,368 in 2019. Offshore demand is a separate proposition from recruiting a student to travel; a pathway must specify what transfers, at what cost and under which admission criteria. [1,6,11]

The student's choice can involve the US, Australia, Japan, a home-country university or an offshore international degree. Instead of a generic Vietnam campaign, institutions should show a course's academic standard, language support, total cost, housing, safety, internship eligibility and graduate outcomes by location. For a transnational route, explain where instruction occurs and whether later mobility is optional, selective or guaranteed under academic criteria.

Use Vietnamese alumni and current students to answer lived-experience questions, but pair them with staff who can answer recognition and immigration questions. Evaluate agent and school partnerships on completed applications and continuing students, not event attendance. Test additional provinces and cities only after the institution can assess local credentials and provide a dependable service.

Vietnam's multiple routes suggest two distinct strategies. An onshore undergraduate course needs a clear four-year or full-degree affordability story, academic transition support and family confidence. An offshore degree or transfer pathway needs transparent credit, award and mobility rules. A university should ask which route the applicant prefers and why. A student choosing to remain in Vietnam is not necessarily a lost overseas lead if the institution offers a quality local partnership that meets the student's needs.

Indonesia: scholarships and strategic fit

Indonesia's large population does not translate directly into a large self-funded market for every programme. The Indonesian Endowment Fund for Education, LPDP, offers regular funding for eligible citizens to pursue master's and doctoral degrees, including at overseas institutions. Its 2025 terms specify accepted institutions and programmes, an unconditional letter-of-acceptance route and limits on funded duration. Universities seeking LPDP candidates need to align admission timing and documentation with the scholarship process. [8,9]

This does not mean all Indonesian applicants are scholarship-funded. Undergraduate families, self-funded professionals and research candidates have different needs. Separate them in the pipeline and design programme information accordingly. A funded research candidate may ask about supervision and research infrastructure; a self-funded taught-master's student may focus on net cost, career relevance and a realistic work-study balance.

Open Doors counted 8,104 Indonesians in US higher education in 2024/25, down from 8,348 the prior year. Australia counted 25,409 Indonesians across student-visa sectors in 2025. Japan's 2024 student guide listed 6,778 Indonesians among its leading origins, across universities, language and training. These facts show several routes, not a comparable destination market share. [1,3,6]

Build institutional links around defined academic strengths and national or regional priorities, not only rankings. A partnership should clarify faculty capacity, credit, research ethics, language and award recognition. When an LPDP applicant needs an unconditional offer, explain exactly when it can be issued and what the university still requires before enrolment. Avoid committing to an award or start date that cannot be delivered.

LPDP eligibility creates operational precision requirements. A candidate with an unconditional offer may have a different university-choice rule from one still seeking an offer, and a course can be unsuitable if its duration or award conditions do not align. Universities should keep an LPDP-specific checklist with programme eligibility, letter wording, supervisor confirmation where relevant and decision dates, reviewed against the current scholarship terms. Make clear that the funder, not the university, selects and awards the scholarship. [8]

Malaysia and Singapore: alternatives close to home

Malaysia's outbound decision occurs alongside a mature home higher education system and substantial transnational provision. Australian government data show long-standing education links and in-country activity; a prospective student can choose a foreign degree locally, a short transfer pathway or full overseas study. The value of travel must therefore be explicit: specialist facilities, research environment, campus experience, networks or a recognised professional route. [10,11]

UK HESA data continue to place Malaysia among notable non-EU origins, but HESA counts UK provider enrolment while Australian PRISMS counts all onshore student-visa sectors. Compare like with like before allocating spend. Australia recorded 14,808 Malaysian students in 2025 across its student-visa system. [1,5]

Singapore is a smaller Australian student-visa source at 7,166 in 2025, yet it is a significant transnational education partner. The Australian Department of Education describes four Australian university branch campuses in Singapore. A university entering the market should account for strong local institutions, existing overseas providers and students who may prefer a local international credential. The relevant question is which course and student segment benefits from travelling or from a joint pathway. [1,10]

Price is not the only differentiator in either market. Academic depth, recognition, research opportunities, employer ties and flexibility can matter. Publish degree-award location and accreditation unambiguously. For campus transfers, explain credit, fees, housing, visa requirements and whether a student can complete the course locally if circumstances change. Do not count a transnational enrolment as an onshore international arrival.

For Malaysia and Singapore, recruitment should be tested against strong local alternatives. A foreign university may offer an overseas semester, a specialist lab or an international employer network, but it should not imply that a local delivery site is inferior. Clarify whether the same curriculum, staff, assessment and services apply across sites. If a student can move between campuses, disclose the selection criteria and extra living and visa costs before enrolment. Quality assurance must follow the student in either format.

Thailand and the Philippines: avoid a shared script

Australia counted 19,472 Thai and 34,825 Philippine students on student visas in 2025 across sectors. That does not show their university-only mix. The origin countries differ in language, prior education, household financing and professional pathways. A single “ASEAN” message would be unlikely to answer the same questions in both markets. [1]

For Thailand, Australia describes a mature education relationship across training and research. A university should test specific programmes and institutional partnerships, including where research collaboration or professional development is stronger than a broad undergraduate campaign. Measure demand by Bangkok and other cities, course level and actual enrolment outcomes before assuming national scale. [10]

The Philippines brings English-language strength and often asks programme-specific recognition questions, especially where a degree connects to regulated work. Recruiters should publish exact prerequisites, professional accreditation and the limits of overseas employment eligibility. Australia’s multi-sector count may contain vocational and pathway students; it cannot be used as a university master’s forecast. [1]

In both markets, avoid treating a student’s accent or English use as a substitute for assessing academic readiness. Explain assessment formats, support and housing. Agents may help with local context, but students need direct university access to official fees and conditions. If a programme has small historical numbers, treat the initial investment as a bounded pilot and measure qualified applications, offer-to-arrival conversion and early continuation.

Professional recognition is particularly consequential in a programme marketed for international mobility. Name the accrediting body and jurisdiction, state whether graduation meets all or only part of a licensing route, and explain any exams or supervised practice required. Keep claims dated. This applies to Philippine and Thai applicants as well as everyone else; nationality alone does not determine the rule. A course page that resolves this question accurately may convert more suitable students while discouraging costly misapplications.

What students want and what worries them

Programme choice should be studied by **origin, level and destination**. Open Doors publishes field-by-origin tables rather than only an all-nationality average; universities should combine these with their own accepted-offer and enrolment data. It is unsafe to infer that every Southeast Asian market primarily seeks business, computing or nursing from anecdotes. A Vietnam undergraduate cohort, an Indonesian LPDP doctoral applicant and a Malaysian transfer student are pursuing different outcomes. [4,8,12]

Ask students to rank their actual concerns: complete cost, qualification recognition, career fit, family separation, safety, housing, language, visa uncertainty and whether they can return home with a valued credential. Use confidential surveys and live advising rather than assuming one motive from nationality. UCAS research on international choice identifies family, teachers and agents among influencers in some groups, but the balance varies. [16]

Affordability must be presented as a cash timeline, not a tuition headline. List deposits, living costs, visa charges, insurance, travel and scholarship payment dates. A government-funded student needs award and admission schedules to align. A student using family funds may need reliable refunds and the ability to defer if the visa is delayed. Provide real accommodation options and a named person for complex cases.

Political and regulatory change adds uncertainty. OECD reported a fall in new international higher education students across its members in 2024, but that global movement does not predict one country's prospects. Australia's offshore processing priority changes timing, not visa grant criteria. Recruiters should maintain dated guidance and resist any partner's claim to guarantee approval or employment. [17,18]

The way to learn what students want is to ask at a useful moment and triangulate answers. Survey all offer holders, sample those who decline, and interview current students about whether expectations matched reality. Compare those findings with field-by-origin data and programme admissions records. A question about safety may mean housing scams, discrimination, late-night travel or general destination reputation; each requires a different response. Preserve an unknown category when an applicant chooses not to explain.

Channels, partnerships and delivery models

A market entry plan should decide how the university will reach, assess and serve students. School counsellors, education agents, alumni, employers, academic departments and scholarship bodies can each play a role. They require different agreements and evidence of quality. An agent can help interpret local context, but the university should retain the official offer, fee terms, verification and student records, and give applicants a way to contact it directly.

Government and university partnerships can be more durable than a commission-only channel when they connect real curriculum and research needs. Australia names Indonesia and Vietnam as particular priorities and describes long-standing links with Malaysia, Singapore and Thailand. A partnership should specify student benefit, quality assurance, credit, language and a realistic mobility route. [10]

Transnational education deserves a separate financial and academic model. Australian higher education offshore enrolments in Vietnam rose from 7,368 in 2019 to 17,697 in 2024. Those students do not automatically become onshore applicants, but a well-governed pathway may expand access. Institutions should disclose where teaching occurs, who awards the degree, which services the student receives and what must happen before transfer. [11]

For direct digital recruitment, make programme pages country-relevant without fragmenting official policy. Test payment methods, mobile access, document upload and response times in the actual market. Track whether the student reaches a correct answer and completes the task, not simply whether a campaign generated clicks.

Each channel should have a defined quality measure. A school partnership may be judged by academic preparedness and completion; an agent by accurate advice, complete applications and student complaints; an alumni network by the usefulness of its information. Allocate shared staff and platform costs consistently when comparing them. Give students access to official records and a correction route independent of the partner, especially when a third party submitted documents or interpreted an offer on their behalf.

Present position and future scenarios

As of July 2026, Vietnam's US and Japanese series show growth, Australia hosts sizeable cohorts from several Southeast Asian countries, and offshore delivery offers an alternative in some markets. Indonesia's scholarship structure creates a distinct graduate route. These facts support opportunity, but they do not justify a single regional growth percentage or a common forecast for every university. [1,4,6,8,11]

Scenario 1: selective onshore growth. Universities with clear course value, financing support and reliable visas and housing may gain suitable students, especially in established corridors. The test is census enrolment and continuation, not enquiries.

Scenario 2: more regional and offshore study. Students may choose Japan, local international campuses or joint programmes when cost, proximity or risk favours them. A university can participate through quality-assured pathways, but should keep onshore and offshore student numbers separate. [6,10,11]

Scenario 3: policy and price friction. Visa processing changes, housing costs or currency pressure may cause deferrals. Plan refund and late-arrival routes before recruiting at scale. A policy restriction in one destination may shift some applicants, but national totals alone cannot establish where each student went.

Monitor origin-country applications by programme and level, qualified offer rates, scholarship dependencies, visa progression, deposit-to-arrival conversion, agent performance, offshore transfer and first-year persistence. Revisit the country plan every intake, not only when a regional headline changes.

The three scenarios should be translated into capacity decisions. Selective onshore growth may require more admissions and housing support. More offshore study requires academic quality assurance and transfer management. Policy and price friction requires deferral, refund and updated guidance capacity. Leadership should identify which early indicator would trigger each response. This is more useful than assigning precise probabilities to a regional forecast built from incompatible national data.

Smaller and rapidly changing markets

The region's smaller or less familiar corridors should not be ignored, but they require more care than copying a large-market playbook. JASSO counted **16,596 students from Myanmar** in Japan in 2024, more than twice its 2023 figure of 7,773. This includes language and professional training as well as university study. It signals a changing route to Japan, not the number of Myanmar degree applicants available to another university. [6]

For Cambodia, Laos, Brunei and Timor-Leste, many destination datasets have small numbers or inconsistent coverage. An institution should avoid a confident market-size claim based on one country's visa count or a regional estimate. Instead, begin with qualification mapping, local partner due diligence and a small pilot tied to a course that has a clear academic and career rationale.

Some applicants may face disrupted records, limited banking access or unusual travel constraints. The university should define acceptable alternative evidence and a fair review process, without lowering academic standards or assuming fraud because documentation differs from familiar formats. Staff need time to ask the right question and verify evidence proportionately. A standard automated rejection for an unfamiliar transcript can lose a capable student.

Where political or economic conditions are volatile, build a deferral and refund policy before taking large deposits. Make scholarships and emergency support transparent. Keep direct contact with the student even when an intermediary helps. A regional strategy can be inclusive, but it should expand only as quickly as the institution can support an actual student through admission, travel and study.

For small corridors, a university can start with a few qualified partnerships rather than a broad paid campaign. Document local qualifications, train staff on the relevant system and test the application route with real applicants. If records are disrupted, offer a published alternative-evidence process and trained human review. Establish safeguarding and contact procedures for students whose circumstances change. The pilot should have a clear point at which it pauses if service quality cannot keep pace.

A country-by-country decision matrix

The following matrix converts published evidence into starting hypotheses. It is not a claim that every student from a country has the same goal. Each university should test the proposition against its programme-level applicants and enrolled students.

Market	Evidence-led starting point	University test
Vietnam	Large US undergraduate and Japanese/Australian routes. [1,4,6]	Which courses beat nearby and offshore alternatives on value?
Indonesia	LPDP creates a defined graduate pathway. [8]	Can admissions and scholarship dates align?
Malaysia	Local and transnational options are established. [10,11]	What does physical mobility add to the degree?
Thailand	Mature bilateral education links. [10]	Which specialist courses have credible partners?
Philippines	Large Australian all-sector population. [1]	Which share is university-ready and for what profession?
Singapore	Strong local and branch-campus alternatives. [10]	Is a niche overseas course or joint route distinctive?

Table 2. Strategic hypotheses. The cited figures describe different populations and do not form a market-share ranking.

Use the matrix to choose a small number of programme-country pairs rather than spread a marketing budget evenly across six flags. For each pair, identify a student need, a credible alternative, a staff owner, one or two qualified partners and the admissions and support capacity required. Review the hypothesis after an intake. If the evidence shows a different student segment, change the plan rather than forcing the data into the original story.

Build a service that can support diversification

Diversification has operational costs. A new country may require unfamiliar academic equivalencies, local language explanations, different payment timing, agent oversight and student support outside established time zones. Estimate these costs before interpreting a large population or rising national income as a revenue opportunity. The first test is whether an applicant can complete the process and obtain accurate help.

Set a common service standard across markets: official programme and fee information, clear offer conditions, acknowledgement of documents, dated visa guidance, named handoffs, and a documented refund or deferral route. Then localise only what genuinely differs, such as qualifications, scholarship rules, delivery models and a family's information needs. This preserves consistency without treating countries as interchangeable.

Use two levels of measurement. The **regional view** reports total qualified applications, costs and staff capacity, helping leadership see concentration risk. The **country-programme view** reports offer-to-census conversion, visa-stage delay, scholarship dependency, early continuation and complaints. A regional average can conceal a weak Philippine professional pathway or an effective Indonesian funded research route.

Choose an experiment for each priority corridor. Randomly invite eligible Vietnamese undergraduates to a peer question session, or phase a scholarship-clinic service for Indonesian applicants, while preserving ordinary support. Measure enrolment and early experience, not clicks or attendance alone. If a route proves viable, formalise academic and student-service capacity before scaling marketing.

Good diversification broadens access and institutional resilience. Its test is whether each student receives a sound course choice and a workable path into study. The institution should be willing to pause a new corridor if it cannot yet provide that standard.

Country competence needs named ownership. Assign a recruitment lead, an admissions specialist and a student-support contact for each priority corridor, even if individuals cover several countries. Keep a dated knowledge base for scholarships, qualification examples and official destination guidance. Review a sample of completed and abandoned cases after each intake. The question is whether the student received a correct, timely resolution, not whether an email was sent. Release capacity for complicated cases before expanding acquisition.

Recruiting priorities for the next intake

Create six country plans. For Vietnam, Indonesia, Malaysia, Thailand, the Philippines and Singapore, choose priority courses, levels, cities, partner types and a service owner. Describe the decision alternative students actually face, including local and regional provision. Use the institution's own conversion and continuation data to decide where to expand.

Make evidence programme specific. Publish curriculum, prerequisites, total cost, scholarship and loan timing, qualification recognition, realistic career routes and housing. Use field-by-origin data to form hypotheses, then check them with applicants and enrolled students. Avoid generic claims about "Asian" preferences. [12]

Build trusted routes. Train and review agents; develop academic and scholarship partnerships where there is genuine fit. For Indonesian LPDP candidates, align offer letters and deadlines with award rules. For transnational pathways, make credit and transfer conditions explicit. Give all applicants direct access to their university record and staff. [8,10,11]

Evaluate after the offer. A current-student conversation may ease transition concerns; a targeted award may address a funding gap; a visa clinic may prevent a missed intake. Choose the intervention that matches the problem and compare outcomes with a credible baseline. Count arrivals, early study and student effort alongside deposits.

Southeast Asia can be a meaningful source of students and partnerships. Institutions will earn results by understanding each country and serving the whole student journey, rather than treating regional diversification as a lead-generation exercise.

A board-level report should show both concentration and experience. Alongside total Southeast Asian enrolment, include country and programme mix, offer-to-arrival conversion, first-year continuation, complaints, scholarships and the cost of serving each enrolled student. Explain that an offshore enrolment, an onshore visa holder and a new university entrant are different measures. This prevents a regional growth headline from concealing a poor student pathway and helps the institution invest where it can deliver well.

Sources

Sources were published by the evidence cut-off shown on page 2. Links point to the cited release or study; later updates to a live page may be visible after this edition.

1. Australian Department of Education (1 May 2026). International students studying in Australia, 2005–2025.
2. Australian Department of Education (2026). International student monthly summary and data tables, 2025 annual series.
3. IIE (17 November 2025). Open Doors 2025 Fast Facts, leading origins and annual change.
4. IIE (2025). Vietnam country fact sheet, US 2017/18–2024/25 and academic levels.
5. HESA (27 January 2026). UK student statistics 2024/25, student origin.
6. JASSO (2025). International Student Survey in Japan 2024, nationality and coverage.
7. UNESCO Institute for Statistics. Methodology for international mobile tertiary students.
8. Indonesian Endowment Fund for Education (LPDP). Regular Scholarship 2025, master's and doctoral eligibility.
9. LPDP (July 2025). Second scholarship round, 2025.
10. Australian Department of Education. Priority partner countries: Southeast Asia.
11. Australian Department of Education. Offshore delivery of Australian higher education courses, 2019–2024.
12. IIE (2025). Fields of study by place of origin, 2024/25.
13. IIE (2024). Asia regional fact sheets, 2023/24 origin comparisons.
14. IRCC (2024). International Student Program at a Glance, study-permit holders by citizenship.
15. UK Home Office (May 2026). Why do people come to the UK? Study, year ending March 2026.
16. UCAS (2022). Where next? What influences international students' choices.
17. OECD (2025). International Migration Outlook 2025, changing international student flows.
18. Australian Home Affairs (2025–26). Student visa processing priorities.
19. IIE (2025). International student census methodology and origin definitions.



One region. Many markets.

Build country-specific propositions and partnerships. Measure the student experience from first contact through arrival and study.

merta.ai

Prepared by Merta
July 2026

