



International students in the 'Big Four' English destination countries continues to fall. Image generated by ChatGPT.

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Drastic international enrolment decline in 'Big Four'

Nathan M Greenfield 07 June 2026

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Enrolment of international students in the 'Big Four' English destination countries – the United States, United Kingdom, Canada and Australia – continued to decline drastically for the January to March 2026 intake, according to a new study conducted by **Studyportals**.

The declines were greatest in Canada and the US, though in different sectors: 24% fewer undergraduates for Canada and 24% fewer masters students for the US. Australia and the UK saw 16% and 15% declines in masters students.

The decline in international students enrolling in Canada continued the trend recorded last fall when enrolment in Canada by international undergraduates and masters students declined by 36% and 35%, respectively. The decline in international students enrolling in American masters programmes actually accelerated from 19% last fall to 24%.

The decline in masters students choosing Britain reversed the 3% growth it recorded last fall. (Last fall's report did not disaggregate Australia's figures from the "Asian" category, so it is not possible to do a year-by-year comparison.)

The new data is published in the *Global Enrolment Benchmark Survey: Jan-Mar 2026 Intake (GEBS)* **released on 4 June**.

GEBS is based on an online survey completed by 254 universities in 36 countries: 149 from the US, 39 in Europe, 24 in the UK, 13 from Canada, 9 from Australia and 9 from other Asia-Pacific (APAC) countries. Universities filled out the online survey between 23 March and 17 April 2026, in order to capture the January to March intake, which accounts for 31% of the total yearly intake.

GEBS was conducted by the Netherlands-based education analytics and consulting company Studyportals in partnership with the Washington DC-based NAFSA (Association of International Educators) and the Oxford Test of English.

Supporting partners include the Canadian Bureau for International Education, the European Association for International Education, the Asia-Pacific Association for International Education, and Universities UK International.

In addition to the decline of 24% in the number of international undergraduates enrolling in its universities and colleges, Canada saw a decline of 19% in the number of international students enrolling in its masters programmes.

American universities saw a decline of 20% in their BA programmes, a more than three-fold increase compared to last fall. Britain's 11% decline in new international BA students reversed last year's modest

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increase of three per cent.

‘Restrictive government policies’ are the enrolment obstacle

University officials in the ‘Big Four’ countries listed “Restrictive government policies” as the greatest obstacle to international enrolment.

Seventy-one per cent of British respondents rated these policies as the greatest obstacle, while 84% of American respondents and 84% of Canadian respondents did. One hundred per cent of Australian university officials indicated the same thing.

The American and Canadian responses are largely in line with the percentage of university officials who reported that restrictive government policies were the greatest obstacle to enrolment of international students: 85% and 90%, respectively.

While the *GEBS* did not ask responding universities to indicate cause and effect relationships, it is hardly a surprise, given that this report is showing double-digit declines at both the undergraduate and masters levels in Britain, that the percentage of respondents that indicated government policies are the greatest obstacle to enrolment of international students rose 20 percentage points: from 51 per cent to 71 per cent.

By contrast, for the region that reported the most growth, APAC – 16 per cent among BA programmes (almost double last year’s figure) and 5 per cent among masters programmes (two percentage points higher than last year) – restrictive government visa policies did not even make it into the top three obstacles that admissions offices are dealing with.

As they did last year, 59 per cent of European universities rated restrictive government policies as a major obstacle to enrolment, despite recording an increase of five per cent in the number of undergraduates and a one percentage point increase in the number of graduate students.

Regionally different declines

Overall, 51% of universities and colleges reported declines in both undergraduate and postgraduate enrolment.

These declines, however, were drastically different in different regions. In **Canada 69% of institutions saw declines in undergraduate enrolment** and 80% saw declines in graduate enrolment. As previously reported, these declines are to be expected given that Canada is issuing hundreds of thousands fewer international study visas than it was a few years ago.

The United States saw 62 per cent declines in undergraduate and 62 per cent declines in graduate students enrolling.

Given the restrictive policies of Donald J Trump’s administration, the slow pace of visa approval in India (from where the largest cohort comes) and the anti-immigrant politics in the United States that have been reported perviously, the decline that Studyportals documents is hardly a surprise.

It is also in line with the 9.2% decline in total international student enrolment in public four-year institutions (the ones which enrol the bulk of the cadre) in the United States reported this week by the **National Student Clearinghouse Research Center**.

Cara Skikne, Studyportals’ head of communication and thought leadership, who authored the report and hosted the webinar at which

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it was launched, said American institutions were trying to fill the seats left open by absent international students by recruiting transfer students from other American institutions as well as by athletic recruitment, among other things.

While such a strategy might benefit university “A” it is at the expense of college “B” and demonstrates that the American recruitment system is working with finite numbers, which are made worse by the fact that the number of Americans graduating high school has begun falling by hundreds of thousands per year.

Sixty-two per cent of British universities saw declines in international undergraduate enrolment and 65% saw declines in their graduate programmes. In Australia, 44% of institutions saw their cadre of international students decline while 67% of institutions saw the same among their graduate programmes.

According to Skikne, to grow the student pie, UK universities “relied more on increased scholarships and financial aid”.

By contrast, only a quarter of European universities saw declines at the undergraduate level and 14% saw declines at the graduate level. These declines were more than offset by the 47% of European universities that saw the number of international undergraduates increase and 43% of institutions that saw the same for their international graduate students.

Skikne told the webinar that European university officials reported looking to new programmes and improved social media presence to attract new students.

More than eight in ten (82%) institutions in the APAC region saw their international undergraduate numbers grow, while only 14% saw them decline. At the masters level, 55% of institutions saw their enrolments grow, 36% reported that they had stayed the same and only 9% reported that they had declined.

Obstacles to enrolment

Obstacles to enrolling international students, besides the aforementioned restrictive government policies, are similar across the six regions Studyportals divided the world’s higher education sector into.

“Affording tuition and [the] cost of living” was named by 45% of respondents from the APAC region as the greatest obstacle, but 56% by Australians, while 49% of European universities, 46% of British universities and 52% of American respondents rated affordability as the second greatest obstacle to enrolling international students.

But only 15% of Canadian respondents named affordability as a major issue, which put this issue in third place among Canadians.


The percentage of respondents who named “lack of suitable accommodation” as a major obstacle declined from 20% last year to 13% in this most recent report, which is interesting given that the impact of international student recruitment on the rental market is a hot political issue in many countries.

Other issues that declined in importance were “Meeting English proficiency requirements”, which fell two percentage points to nine per cent and “Meeting academic requirements”, which fell from 15% to nine per cent.


GEBS surveys university officials on their plans for the coming year. Thirty-two per cent of institutions expect budget cuts in the coming year, which is six percentage points lower than last year.



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Last year, 17% of institutions expected staffing cuts; this year the figure is 13%. While 12% of institutions expected staffing cuts last year, this year the figure is 13%. However, these numbers mask what respondents from the 'Big Four' said about expected budget cuts.

The percentage of institutions that planned on major expansion of online programmes remained at last year's figure of 30%, while the percentage of institutions that foresaw a marked increase in the use of AI also remained unchanged at 26%.

Expectations of diversifying into new markets, making large changes to programmes and aggressively increasing enrolment goals also declined: from 43% to 37% for diversification, 17% to 15% for making changes to programmes and 33% to 27% for aggressively increasing enrolment goals.

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