



# Reframing Global Student Mobility

From Market Uncertainty to Strategic Realignment

# Content

---

■	Foreword	<b>4</b>
■	Executive Summary	<b>5</b>
■	OneStep Global Agent Pulse: Survey Insights	<b>6</b>
■	A More Nuanced and Better-Informed Mobility Landscape	<b>17</b>
■	The Shift Toward Outcome-Driven Decision Making	<b>18</b>
■	Rebalancing of Destination Demand	<b>19</b>
■	Employability as a Core Expectation	<b>22</b>
■	Financial Pressures and Smarter Decision Pathways	<b>23</b>
■	The Emergence of Alternative Pathways	<b>24</b>
■	Evolving Operational Expectations and Institutional Agility	<b>25</b>
■	Implications for Stakeholders	<b>26</b>
■	Strategic Outlook for Global Student Mobility	<b>27</b>
■	Summary of the Recruitment Partner Survey	<b>28</b>

# Foreword



**Aritra Ghosal**

Founder and CEO

**OneStep Global**

International student mobility has long been driven by aspiration—students crossing borders in pursuit of knowledge, opportunity, and growth. While that aspiration remains strong, the context is evolving. Shifting policies, economic pressures, and a growing focus on career outcomes are reshaping how students plan their journeys and how stakeholders engage with them.

At OneStep Global, our work across institutions, partners, and student communities highlights a clear shift toward more informed, outcome-driven decision-making. Students are asking sharper questions, agents are becoming strategic advisors, and institutions are expected to demonstrate clarity, responsiveness, and long-term commitment to student success.

This white paper draws on insights from our Agent Meeting and Agent Pulse Survey across South Asia, offering a timely view of changing mobility trends—from destination preferences to financial planning and employability. It reinforces a key reality: the future of international education depends on stronger alignment across the ecosystem.

As the sector recalibrates, transparency, collaboration, and localised strategies will be critical to sustaining trust and growth. International education remains a powerful force for opportunity and global connection—and together, we have the opportunity to shape a more resilient and inclusive future.

# Executive Summary

---

International education continues to be one of the most dynamic global sectors, shaped by sustained student aspiration, demographic momentum, and the growing importance of cross-border skills. Insights from the **OneStep Global Agent Pulse**, together with discussions with Agents across key markets, indicate that demand for overseas education remains resilient even as decision patterns evolve.

Students and families are approaching international study with greater clarity of purpose. Considerations such as career outcomes, long-term mobility pathways, and financial planning are becoming more central to destination choice. This reflects a natural progression in a maturing global market where stakeholders are increasingly focused on value, preparedness, and long-term impact.

Destination ecosystems are also adapting. Policy refinements, new programme delivery models, and enhanced student support structures are reshaping how institutions engage international cohorts. Emerging pathways, including transnational education options and diversified recruitment strategies, are expanding the ways in which global education opportunities are accessed.

These developments point to a sector that is recalibrating rather than retreating. Agents report that while timelines may be lengthening and decision criteria becoming more rigorous, student intent remains strong and geographically diverse. This shift is encouraging institutions and intermediaries to adopt more transparent communication, stronger career alignment, and deeper market engagement.

This paper examines how the evolving expectations of students, institutions, and destination governments are collectively redefining international recruitment dynamics. It argues that the current phase represents a strategic evolution towards a more sustainable, outcomes-driven global mobility ecosystem, one that is better aligned with the aspirations of the next generation of internationally mobile learners.



# OneStep Global Recruitment Partner Pulse: Survey Insights

## Agent Meeting – March 2026

This section presents key insights from the OneStep Global Agent Pulse Survey, conducted during the Agent Meeting in March 2026. The survey captured real-time sentiment from the Top 100 Agents across the South Asia market, highlighting evolving challenges, decision drivers, and emerging trends shaping international student mobility. The findings provide a grounded perspective on Agent priorities and market shifts, forming a critical input for strategic planning in international education.

01

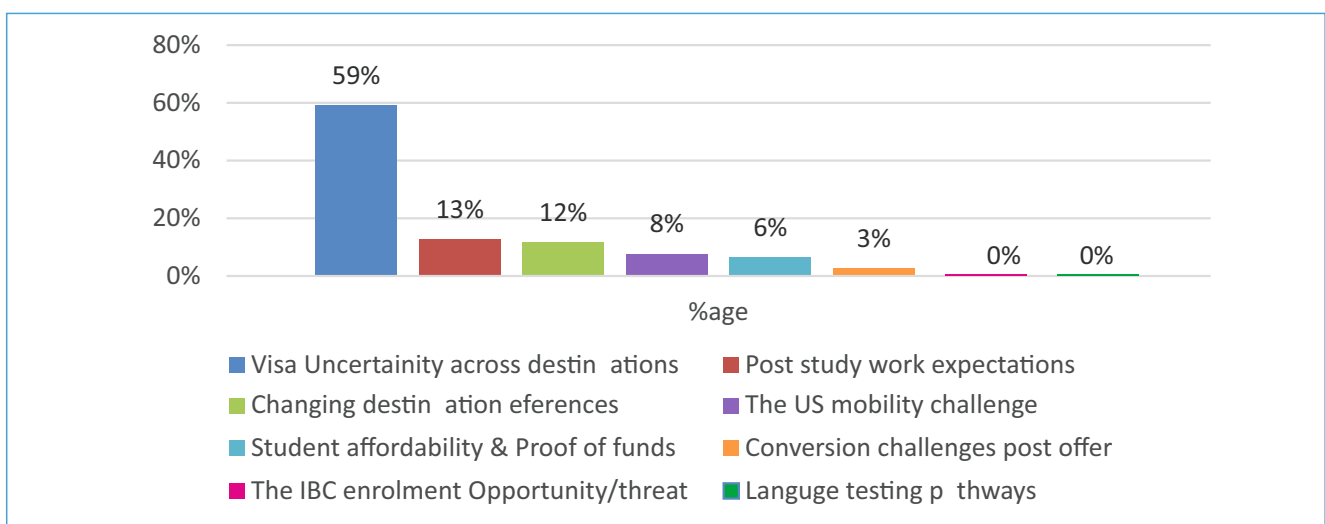
### Key Challenges Impacting Recruitment Today

The survey highlights that visa uncertainty across destinations remains the most significant concern for Agents, followed closely by post-study work expectations and changing destination preferences.

This indicates a strong correlation between policy volatility and student decision-making, where unclear or shifting immigration pathways are directly impacting recruitment pipelines. Additionally, challenges such as affordability and conversion post-offer suggest that even when demand exists, execution barriers persist.

Overall, the recruitment landscape is increasingly influenced by macro-level policy changes rather than purely institutional factors, requiring Agents and universities to adopt more adaptive and transparent engagement strategies.

*According to you, what are the most pressing issues impacting Recruitment today?*



## 02

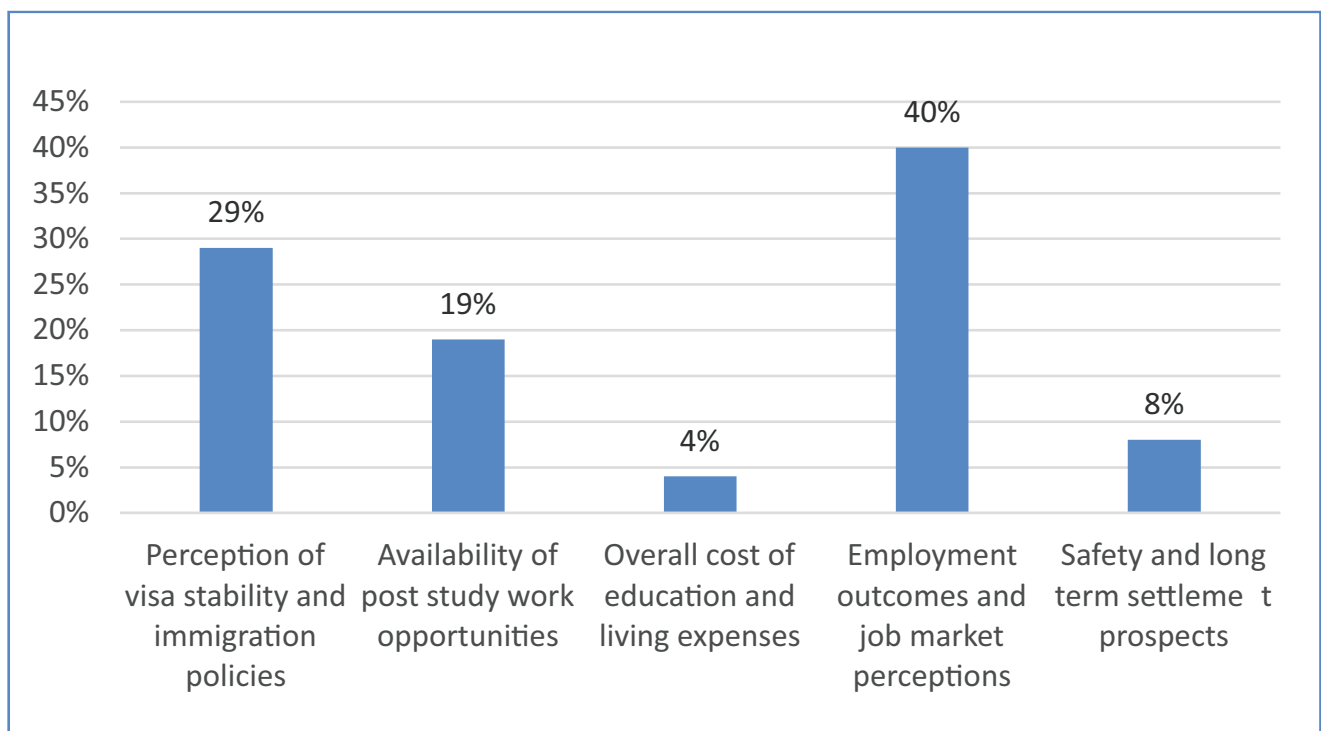
### Drivers of Destination Preference Shifts

Agents identified **employment outcomes and job market perceptions** as the primary driver of changing destination preferences, followed by **visa stability** and **post-study work opportunities**.

This reinforces a clear shift from traditional brand-driven decision-making to **outcome-driven choices**, where students prioritize return on investment and long-term career prospects. Safety and cost, while still relevant, are secondary considerations compared to employability.

The findings suggest that institutions must reposition value propositions to emphasize career pathways, industry alignment, and graduate outcomes to remain competitive.

*What factors are most driving shifts in destination preference among Indian students?*



# 03

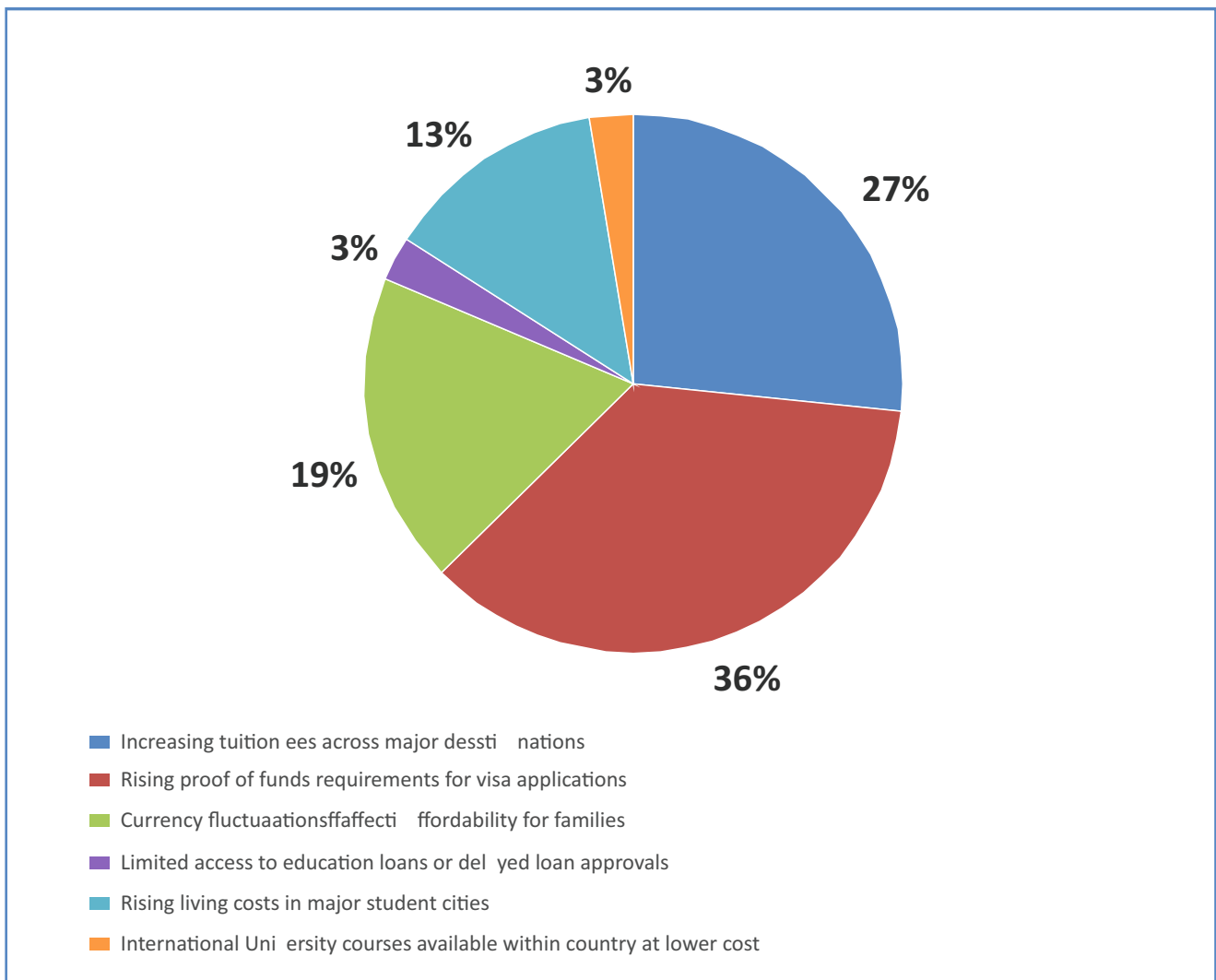
## Financial Barriers Affecting Enrolments

The most pressing financial constraint identified is the **rising proof of funds requirement for visa applications**, followed by increasing tuition fees and currency fluctuations.

This highlights that regulatory financial thresholds are now as impactful as actual cost increases, creating additional friction in the student journey. Even when students can afford education, compliance-related financial documentation is becoming a bottleneck.

The data also reflects growing sensitivity to macroeconomic factors, indicating that affordability is no longer static but dynamically influenced by global financial conditions.

*What financial factors are most affecting student applications and enrolments today?*



# 04

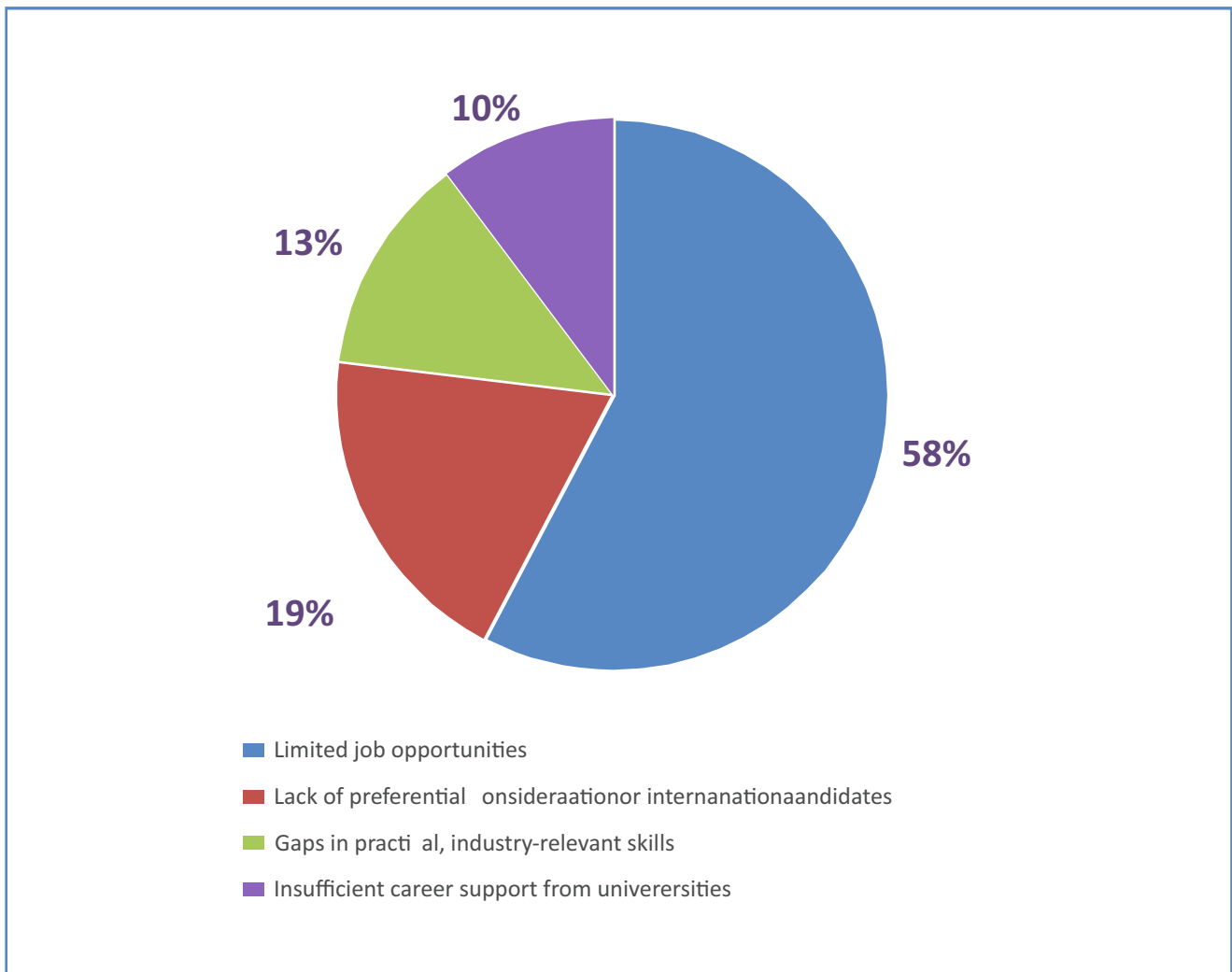
## Employment Challenges for International Students

Agents ranked **limited job opportunities** as the top employment challenge, followed by lack of preferential hiring and skill gaps.

This underscores a disconnect between education and employment outcomes, which directly affects both student demand and Agent confidence. Even in destinations with strong academic offerings, weak employment pathways reduce attractiveness.

The findings suggest a need for stronger university-industry integration, enhanced career services, and clearer communication around employability outcomes.

*What are the key employment challenges faced by international students?*



05

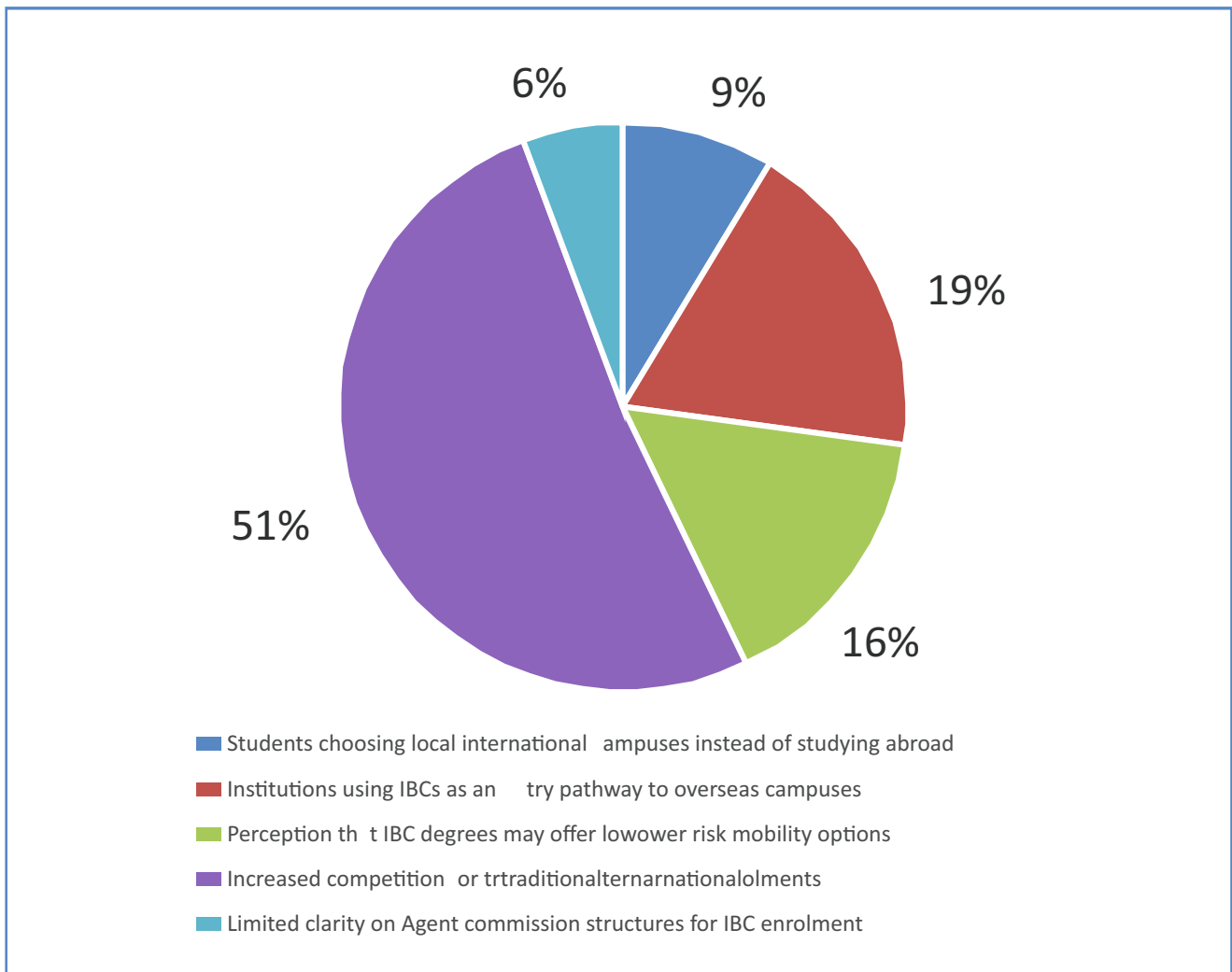
**Impact of International Branch Campuses (IBCs)**

The emergence of IBCs is primarily seen as **increasing competition for traditional international enrolments**, while also offering perceived lower-risk mobility options.

This reflects a structural shift in global education delivery, where transnational education models are beginning to disrupt traditional outbound mobility. Students are increasingly considering hybrid or local international options.

For institutions and Agents, this introduces both a competitive threat and an opportunity to rethink pathway models and diversify recruitment strategies.

*How do international branch campuses and transnational education models impact your recruitment outlook?*



06

Declining Interest in the United States

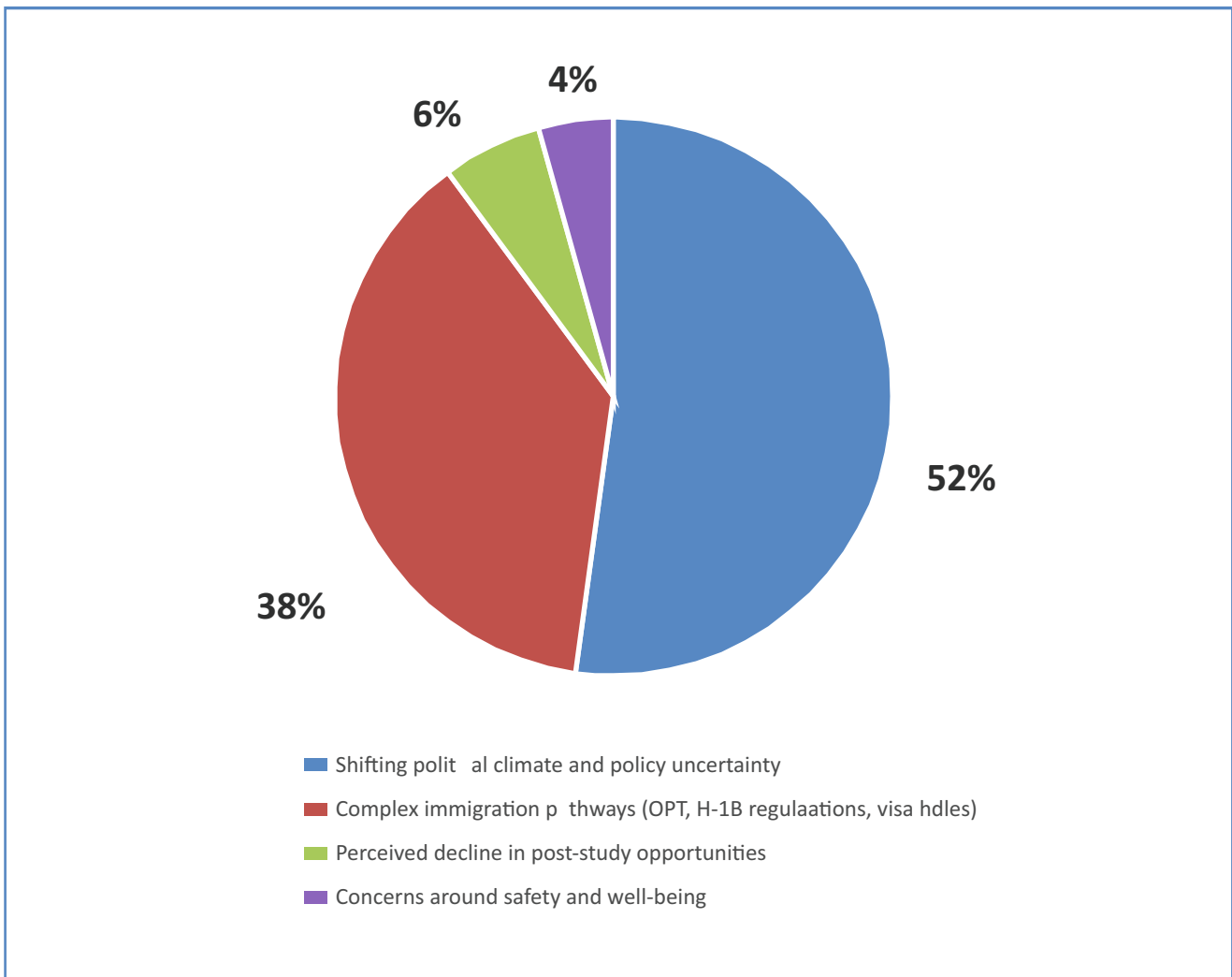


The **shifting political climate and policy uncertainty** was identified as the leading factor driving reduced interest in the US, followed by complex immigration pathways.

This indicates that perception and narrative around a destination can be as influential as actual policy changes. Even historically strong destinations are vulnerable to sentiment shifts driven by external factors.

The findings suggest that rebuilding trust and clarity around post-study pathways will be critical for sustaining US competitiveness.

*What factors are contributing to the decline in student interest in USA?*





07

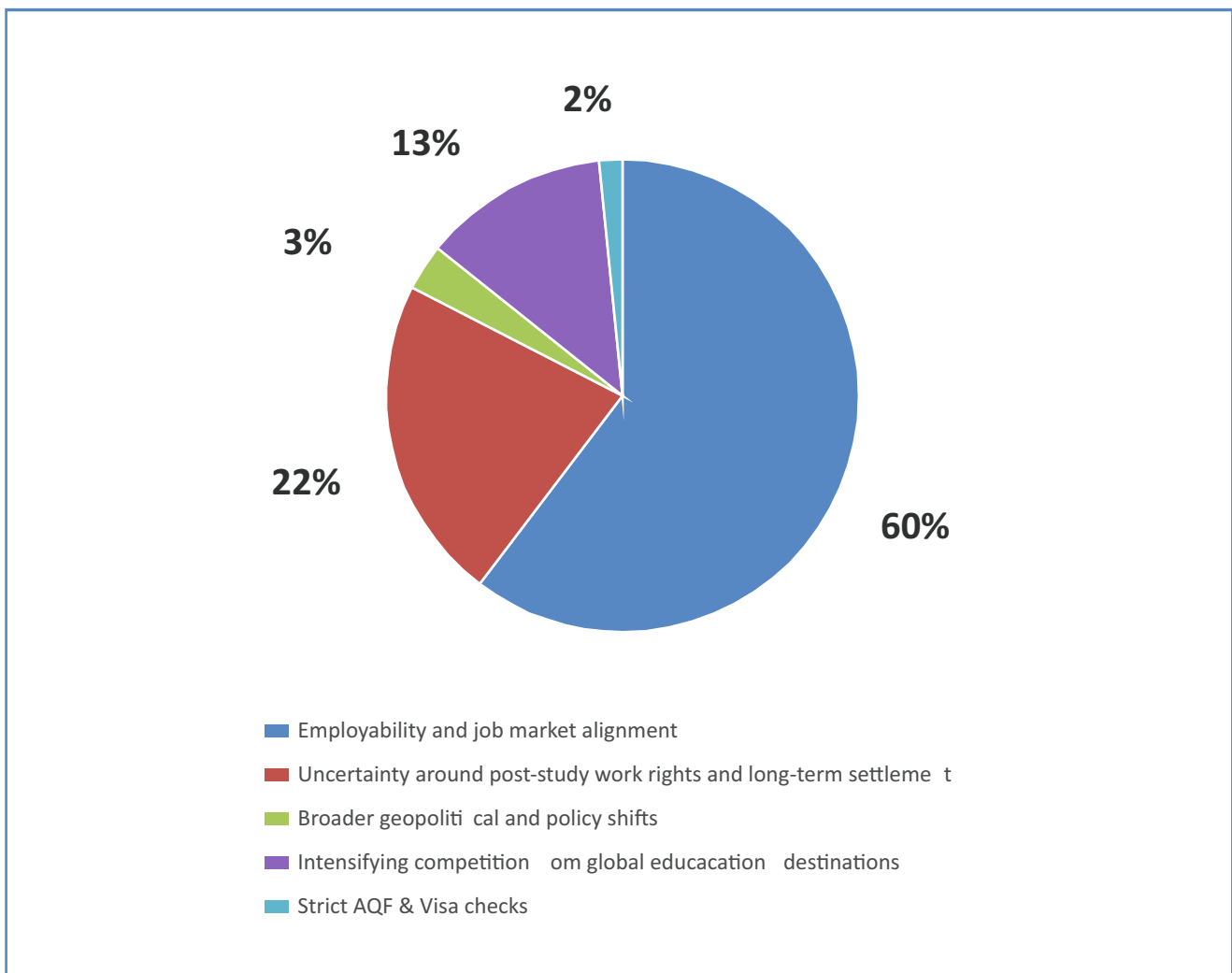
Key Challenges Facing the UK

The primary concern for the UK is **employability and job market alignment**, followed by uncertainty around post-study work rights.

This signals that while the UK remains attractive academically, its long-term value proposition is being questioned. Students are increasingly evaluating whether education translates into meaningful employment outcomes.

The competitive pressure from other destinations further reinforces the need for clearer career pathways and stronger employer engagement.

What is the biggest challenge facing UK as a study destination?



08

Perception Shift in Ireland

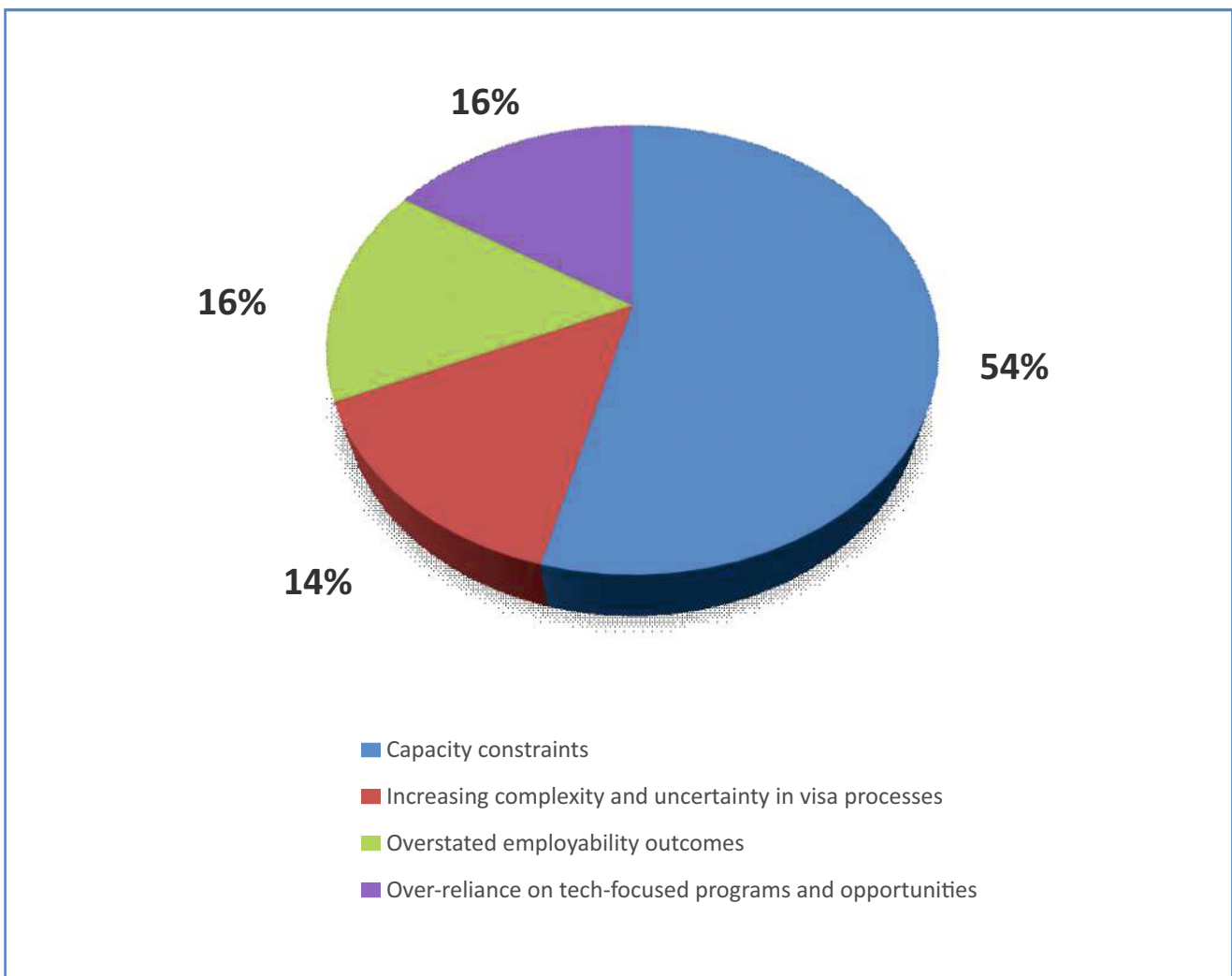


Ireland’s perceived decline is largely attributed to **capacity constraints**, followed by over reliance on tech programs and visa complexities.

This suggests that rapid growth without proportional infrastructure expansion can negatively impact destination perception. Limited seats and concentration in specific disciplines may be restricting broader appeal.

The findings indicate a need for diversification of program offerings and improved system capacity to sustain growth momentum.

*What factors have contributed to the perception that Ireland has lost its glory?*



09

## Sentiment Towards Australia

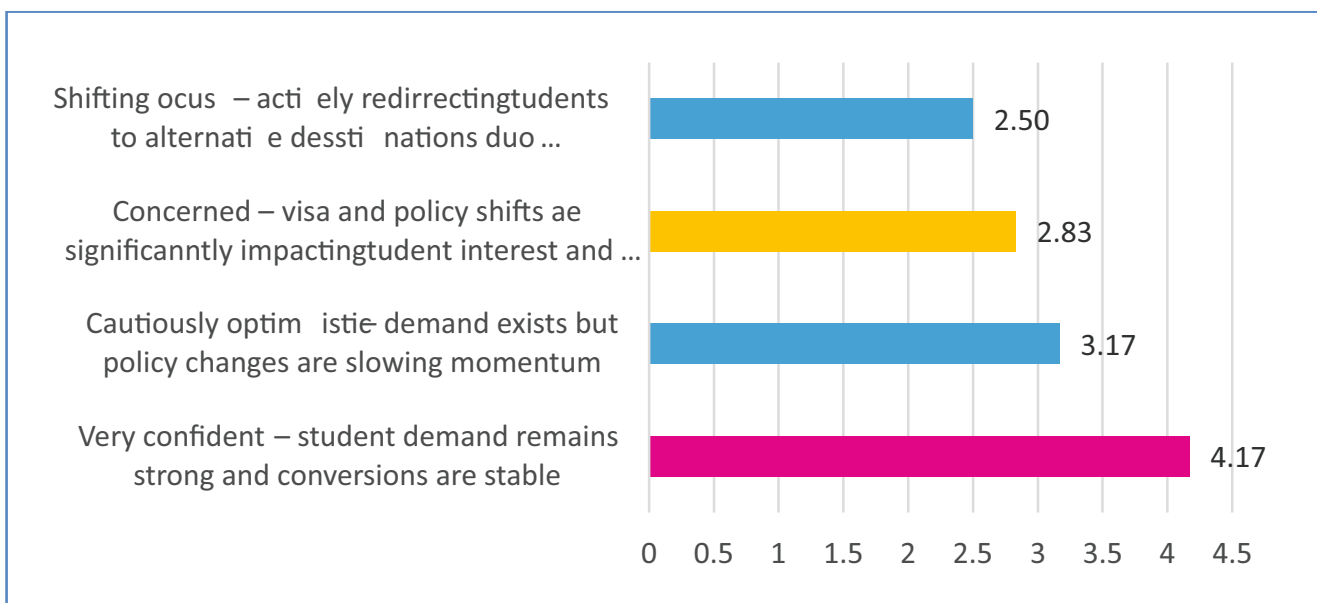


Agent sentiment towards Australia is **mixed but leaning positive**, with “very confident” responses scoring highest, while concerns around policy tightening remain evident.

This reflects a market in transition, where strong demand fundamentals continue to exist but are tempered by regulatory uncertainty. Agents are cautiously optimistic but closely monitoring policy changes.

The results suggest that consistent policy communication and stability will be key to maintaining Australia’s position.

*How do you currently feel about recruiting for Australia given the recent tightening of policies across South Asia?*



10

Sentiment Towards New Zealand

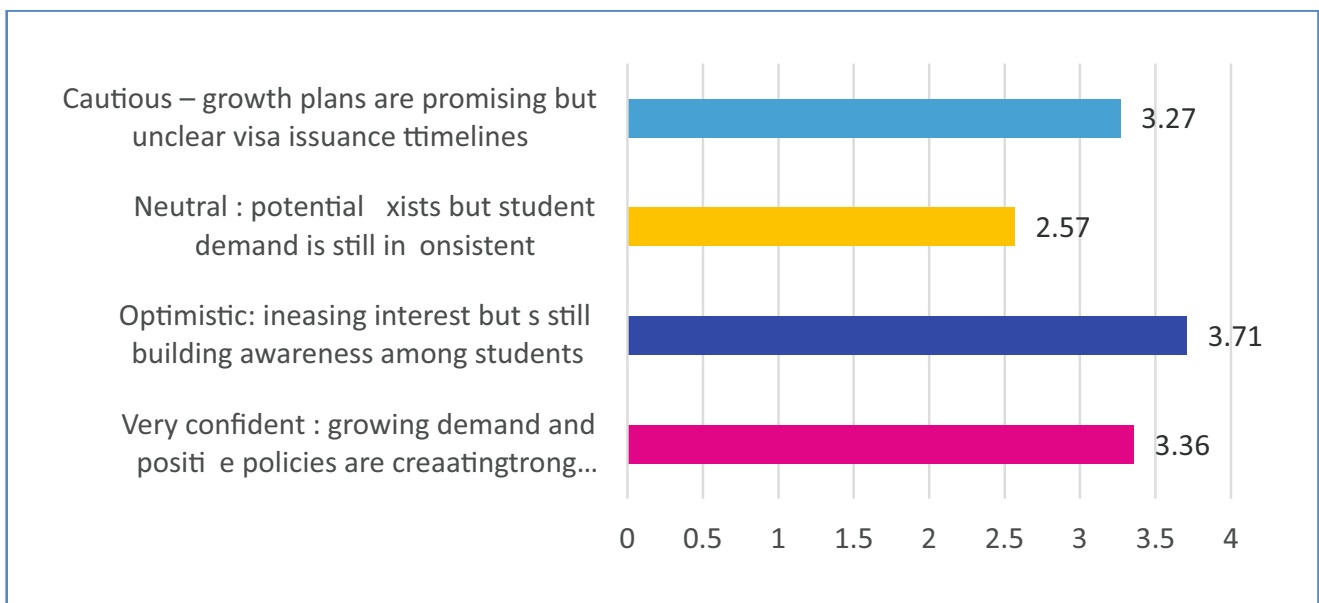


New Zealand is viewed with moderate optimism, particularly due to its expansion plans, though awareness and demand remain inconsistent.

Agents recognize the potential of the destination but highlight the need for stronger market positioning and clearer visa timelines. Growth is expected but not yet fully realized.

This presents an opportunity for institutions and policymakers to proactively build awareness and streamline processes to accelerate adoption.

*How do you currently feel about recruiting for New Zealand given its plans to expand international student enrolments?*



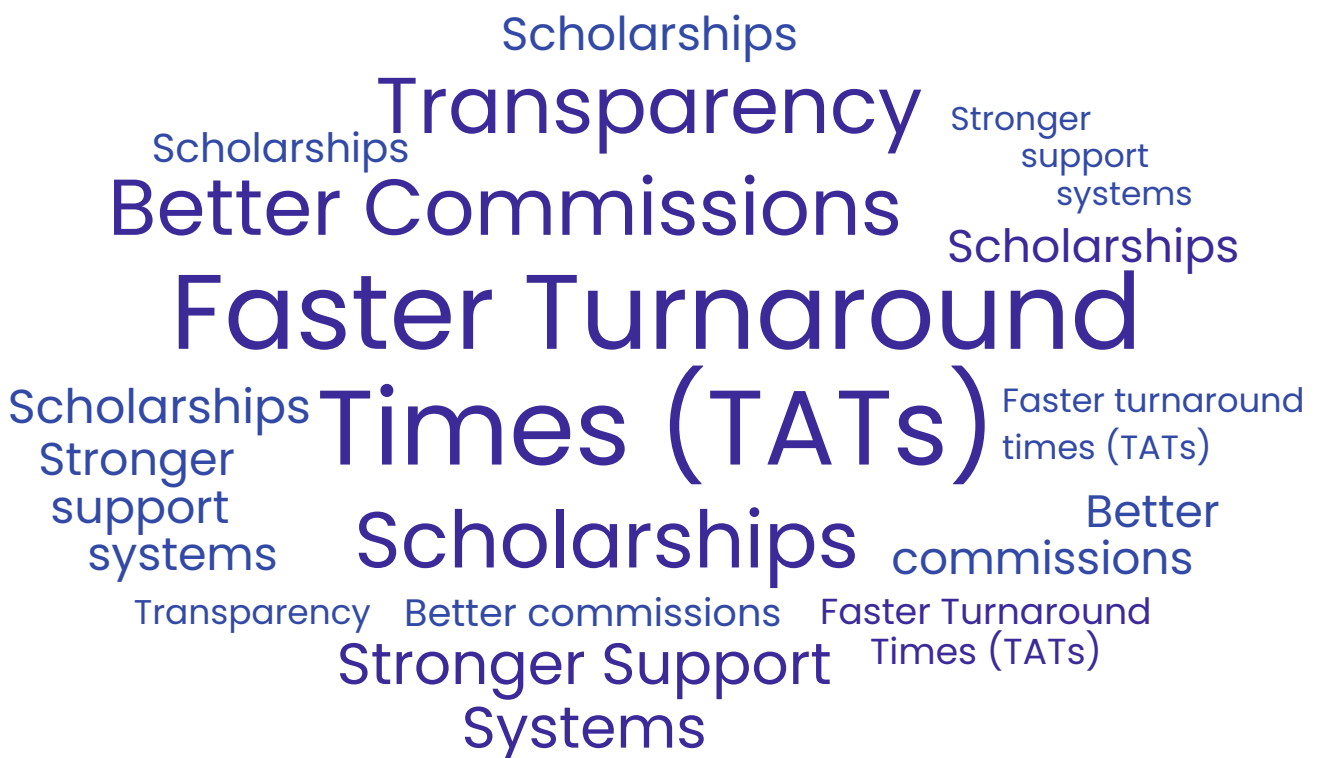
11

**Agent Expectations from Institutions**

Key recurring themes from Agent responses include **faster turnaround times (TATs), better commissions, scholarships, transparency, and stronger support systems.**

These expectations reflect a demand for operational efficiency and partnership alignment, rather than just transactional engagement. Agents are increasingly seeking reliability, clarity, and mutual value creation.

The emphasis on visa support, employability, and communication further reinforces that Agents view themselves as long-term stakeholders in the student journey, not just intermediaries.



# A More Nuanced and Better-Informed Mobility Landscape

Insights from the Agent Pulse suggest that international student mobility is entering a phase characterised by greater nuance in decision-making. While the structural environment has become more layered, Agents observe that students are engaging with overseas education choices in a more deliberate and informed manner.

Visa processes and policy clarity continue to shape recruitment conversations across markets. At the same time, expectations around post-study work opportunities and evolving destination preferences are influencing how students evaluate their options. These considerations are increasingly part of a broader decision framework rather than isolated concerns.

What is becoming evident is a shift in how students define confidence in a destination. Traditional signals such as institutional reputation or historic popularity are now being weighed alongside practical outcomes, including employability potential, affordability, policy stability, and long-term mobility prospects.

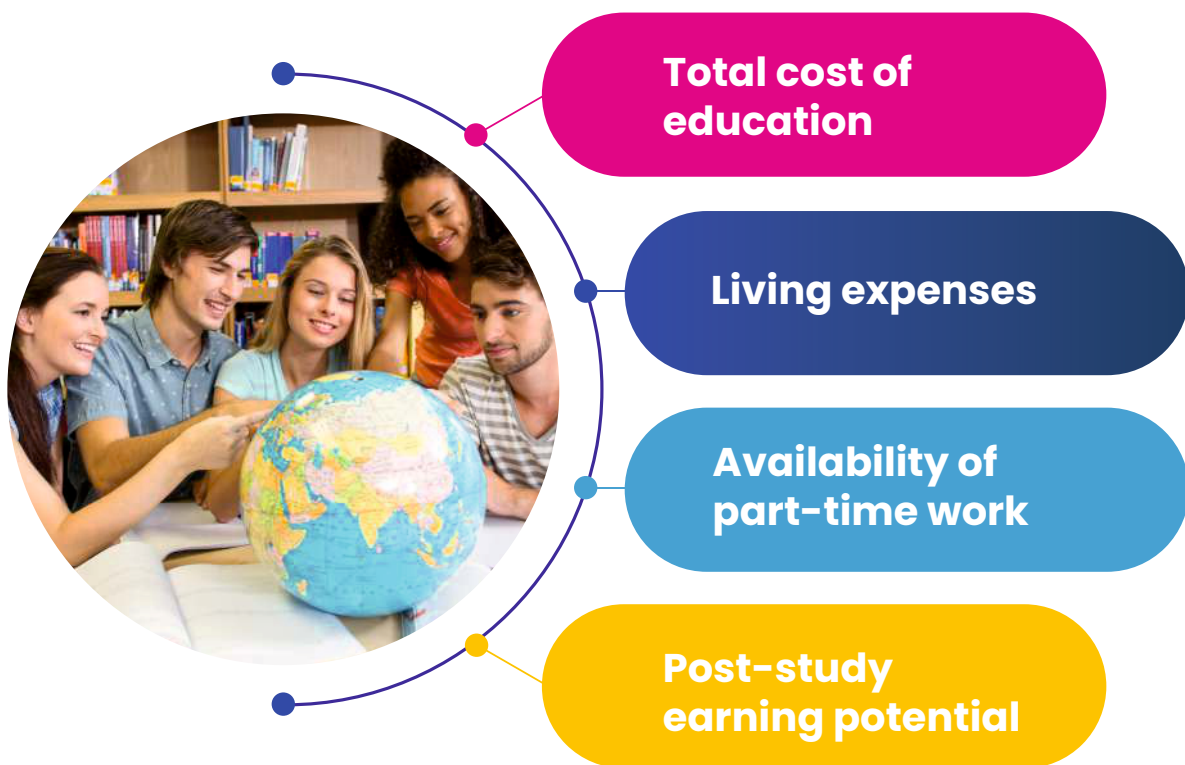
This has contributed to the emergence of a more research-driven applicant cohort. Students are investing more time in comparing pathways, seeking clearer guidance, and engaging more proactively with recruiters and institutions. For stakeholders across the ecosystem, this represents an opportunity to strengthen transparency, improve alignment with career outcomes, and build deeper trust in the international education journey.



# The Shift Toward Outcome-Driven Decision Making

A defining characteristic of the current market is the increasing importance of outcomes. Employment prospects have emerged as the primary driver influencing destination preference. Students are evaluating not just where they will study, but what the outcome of that education will be in terms of career progression and financial return.

Return on investment is now a central consideration. This includes:



Destinations that can demonstrate a clearer linkage between education and employment are gaining stronger consideration. At the same time, students are moving away from decisions based solely on brand value or historical preference.

This does not indicate reduced aspiration. It reflects a more structured and pragmatic approach to decision-making, where students are aligning educational choices with long-term career outcomes.

# Rebalancing of Destination Demand

Findings from the Agent Pulse point to a gradual rebalancing of student interest across global destinations. Rather than signalling a contraction in demand, current mobility patterns suggest a diversification of choices as students respond to evolving policy environments, employment prospects, and affordability considerations.

## United States of America



The United States continues to attract strong student interest, particularly for specialised programmes, research depth, and long-term career mobility. Its global academic reputation and industry linkages remain significant pull factors across major sending markets.

Students are approaching the destination with greater planning and clarity around programme outcomes and post-study pathways. This reflects a more informed decision environment rather than any weakening of aspiration towards the US as a study destination.



## United Kingdom



The United Kingdom continues to hold strong appeal for students seeking high-quality academic programmes and globally recognised qualifications. Its established position as a leading international education hub sustains consistent demand across disciplines.

Students are increasingly focused on understanding how academic experience in the UK translates into employment outcomes and long-term career mobility. This is encouraging greater emphasis across the sector on clearer articulation of industry engagement, career support frameworks, and graduate success pathways.

## Ireland



Ireland continues to attract steady student interest, supported by its reputation for strong industry linkages, favourable cost dynamics, and post-study work opportunities. The destination is widely viewed as offering a compelling value proposition within the European study landscape.

Growing demand alongside selective intake capacities has contributed to a more competitive application environment. As a result, students are planning earlier and engaging more proactively with pathway options when considering Ireland as a study destination.

## Australia



Australia continues to generate consistent student interest, underpinned by its strong academic reputation, quality of life, and established post-study pathways. Recent policy refinements are prompting students and Agents to engage with the destination in a more planned and informed manner.

## New Zealand



New Zealand is gaining visibility as an emerging study destination, supported by positive policy signals and a growing focus on international enrolment expansion. While market awareness is still developing in some segments, the destination is increasingly being considered within a broader set of global mobility options.

## Emerging European Markets



Several European destinations, including Germany, France, and Poland, are witnessing growing student interest, supported by relatively favourable cost structures and evolving post-study employment opportunities. These markets are increasingly being viewed as viable pathways within the wider international education landscape.

Students are demonstrating greater openness to exploring a more diverse set of destinations, reflecting a broader trend towards portfolio-style decision-making in global mobility planning.

# Employability as a Core Expectation

Across Agent insights, employability continues to emerge as a defining lens through which students evaluate international education pathways. Perceptions of job availability, industry relevance of skills, and access to professional networks are increasingly shaping how destination value is understood.

Students are looking beyond academic experience alone. Expectations now extend to career preparedness, practical exposure, and the ability to transition effectively into competitive labour markets after graduation. This reflects a broader evolution in how international education is positioned within long-term personal and financial planning.

Encouragingly, signs of alignment are visible across parts of the global ecosystem. Institutions are strengthening career support functions, expanding employer engagement initiatives, and investing in experiential learning models. At the same time, several destination markets are signalling continued openness to international talent as part of workforce development strategies.

Despite these positive developments, perception gaps can still influence decision-making. The clarity with which career pathways and graduate outcomes are communicated remains a critical factor in shaping student confidence. Strengthening the connection between education provision and employment opportunity will therefore remain central to sustaining trust in international mobility pathways.



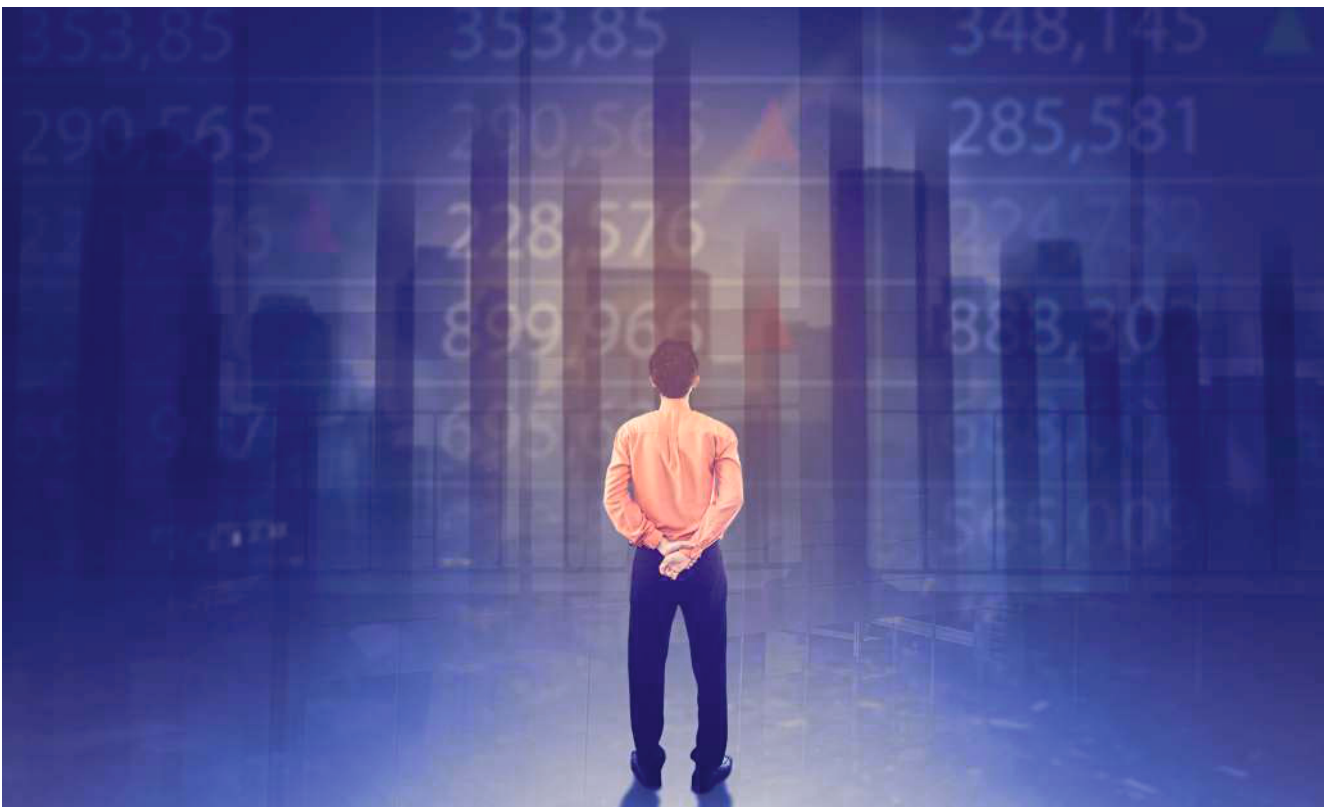
# Financial Pressures and Smarter Decision Pathways

Financial considerations are becoming more central to how students structure their international education journeys. Agents note increased attention to overall cost planning, including tuition commitments, living expenses, and visa-related financial requirements.

Scholarships and funding support mechanisms are playing an increasingly visible role in shaping destination preferences, particularly in markets where families are balancing aspiration with long-term financial prudence. This heightened focus on affordability is encouraging earlier planning and more comprehensive evaluation of study pathways.

Rather than signalling a reduction in demand, these dynamics are contributing to more measured and strategic application behaviour. Students are comparing destinations through a value-oriented lens, taking into account both cost structures and projected career outcomes. As a result, application flows are becoming more diversified across markets.

For institutions and ecosystem stakeholders, this trend reinforces the importance of clear communication around financial expectations, support frameworks, and the long-term return associated with international education investments.



# The Emergence of Alternative Pathways

The growing presence of international branch campuses and transnational education models is reshaping how students engage with global learning opportunities. These pathways are increasing accessibility to international qualifications while allowing students to structure mobility journeys in more flexible ways.

Agents observe that such models are gaining visibility among students who are seeking greater clarity around progression routes, financial planning, and staged mobility options. In parallel, institutions are using branch campus networks and partnership frameworks to build stronger global education pipelines.

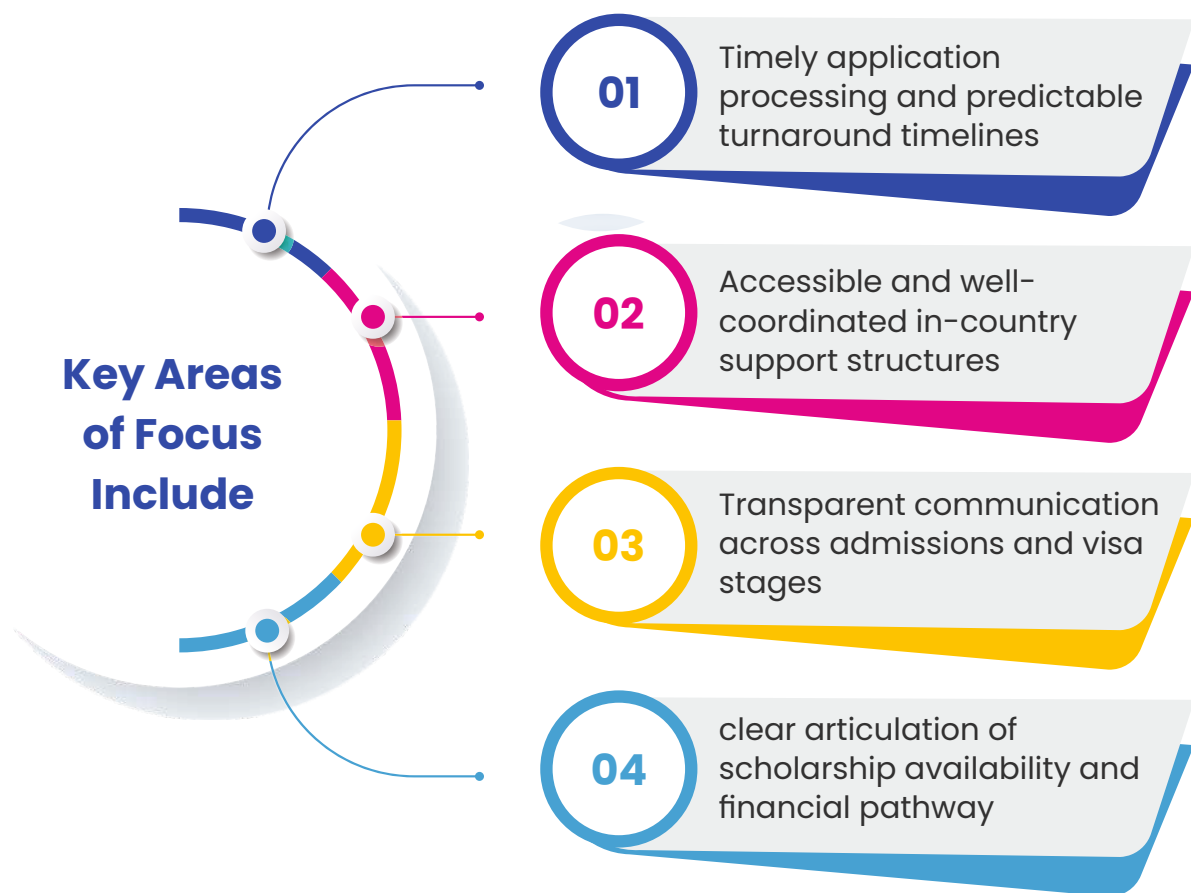
Importantly, these developments are complementing rather than substituting traditional study abroad pathways. They are contributing to a more distributed and adaptable mobility ecosystem in which students can engage with international education through multiple entry points over time.

This evolution reflects a broader shift towards flexibility in global education participation, enabling students to align pathway choices with personal circumstances, financial planning horizons, and long-term academic or career ambitions.



# Evolving Operational Expectations and Institutional Agility

Agent insights indicate a growing emphasis on operational clarity and responsiveness within international education processes. As student decision timelines become more structured, expectations around institutional engagement are also evolving.



Operational effectiveness is increasingly shaping perceptions of institutional reliability among both Agents and students. Efficient communication, process visibility, and consistent engagement are emerging as important differentiators in competitive recruitment environments.

Institutions that are able to demonstrate agility while maintaining clarity and continuity in student support are likely to strengthen trust and sustain momentum in international enrolment pipelines.

# Implications for Stakeholders

The evolving dynamics of international student mobility are contributing to a more transparent and outcome-aligned ecosystem. Students are approaching global education decisions with greater clarity of purpose, while Agents are increasingly playing a consultative role in guiding complex pathway choices. Institutions, in turn, are expanding their focus beyond academic provision to demonstrate long-term career relevance and student value.

As the sector adapts to these shifts, several strategic priorities are becoming more prominent across stakeholder groups:

- 01 Broadening destination engagement to support diversified mobility options
- 02 Strengthening advisory capabilities to guide students through multi-factor decision processes
- 03 Embedding employability outcomes more visibly within institutional value propositions
- 04 Enhancing operational responsiveness to align with evolving decision timelines
- 05 Leveraging flexible pathway models to improve access and participation

These developments reflect a natural progression within a maturing global education environment. Rather than reactive adjustments, they represent forward-looking efforts to build greater resilience, alignment, and sustainability across the international recruitment ecosystem.

# Strategic Outlook for Global Student Mobility

International student mobility is moving into a phase characterised by greater clarity, stronger expectations, and more structured decision pathways. This evolution reflects the growing maturity of a sector that continues to be shaped by sustained global aspiration for education, skills, and professional mobility.

Demand for overseas study remains fundamentally resilient. What is changing is the way students and families evaluate opportunity, with increased focus on long-term outcomes, financial planning, and career progression. Agents are responding by deepening their advisory role, while institutions are strengthening the ways in which they demonstrate value across the student lifecycle.

Together, these developments are contributing to a more transparent and aligned international education ecosystem. A better-informed applicant base, supported by responsive institutions and credible pathway guidance, has the potential to enhance both student experience and sector sustainability.

Looking ahead, the trajectory of global mobility will be shaped by collaboration, adaptability, and a shared commitment to outcome-driven engagement. As stakeholders continue to align around these priorities, the next phase of growth is likely to be defined not only by scale, but by the quality and resilience of international education pathways.



# Summary of the Agent Survey

**The OneStep Global Recruitment Agent Pulse Survey** highlights a recruitment landscape undergoing rapid structural change, driven by geopolitical volatility, shifting immigration policies, and more outcome-focused student decisions. Agents are navigating an unpredictable environment where **visa stability, employability, and affordability** now outweigh traditional factors like rankings and brand.

As a result, recruitment has become more complex and risk-sensitive, with agents increasingly acting as advisors navigating uncertainty, and student intent translating into enrolments less consistently. In this context, in-country presence has emerged as a critical enabler—**supporting real-time communication, localized guidance, and stronger trust with students, parents, and partners.**

For institutions, success will depend on **proactive communication, clear employability outcomes, and deeper agent collaboration,** reinforced by strong local engagement to drive resilience and sustained enrolment growth.





## OUR GLOBAL PRESENCE

OneStep Global connects institutions with opportunities across dynamic markets. From strategic hubs to emerging regions, we ensure seamless expansion for universities and academic service providers across Asia and beyond.



Delhi



Mumbai



Bangalore



Dubai



Hanoi



Kuala Lumpur

