



Learning Abroad Industry Survey Results 8.0

July 2025



Introduction

As part of CISaustralia's ongoing industry engagement strategy and to make a significant ongoing contribution to the Learning Abroad Sector (and to our partner Universities), CISaustralia have developed a detailed survey and subsequent set of data that supports the management and growth of institutional Learning Abroad strategies.

The survey and data was born out of COVID but has expanded to be far more than a COVID impact and recovery data set. Australian Universities have provided ongoing positive feedback about the data quality and we believe the survey continues to provide valuable insights, that advance shared knowledge across Australian institutions and the Learning Abroad sector as a whole.

The initial survey was sent in 2020 to determine the immediate impacts of COVID-19 on the Learning Abroad Sector. Subsequent versions of the survey, now in its seventh iteration, were all designed to build on those original results, analyse what has changed, and to benchmark institutional data. A primary goal is to support universities and the Learning Abroad sector to successfully navigate into the future using the latest data and trends. The purpose of this survey is not to duplicate AUIDF data and enrolment reporting. The two surveys collate very different data sets and are complimentary.

CISaustralia has developed a set of indicators for Australian Universities to provide data that has been collated and shared anonymously and confidentially in a summarised format. This 8.0 survey was sent to all 40 Australian Universities and in most cases was completed by the University's Learning Abroad Director, Manager, Coordinator or similar.

A summary of survey results will also be presented at the IEAA Learning Abroad Forum in August 2025.

Thank You



Thank you for your valuable feedback. We truly value your input and appreciate your ongoing collaboration as we continue to support learning abroad opportunities for students across Australia.

Data Integrity

The insights gathered from this survey will enhance shared knowledge across the Learning Abroad Sector and Australian institutions in regards the latest strengths, challenges, trends, threats and opportunities impacting the Learning Abroad sector. Where applicable, the results will be benchmarked against data from the previous seven industry surveys. We will share a summary of the results publicly, presenting the information anonymously and in a format without identifying any individual or institution. A detailed summary of the survey findings is also being prepared for the Learning Abroad Forum in August 2025.

Participation in this survey is voluntary, and all responses are kept confidential. No self-identifying information is collected, and all data is stored securely in a password-protected electronic format.

All data from the 2025 survey and all previous surveys are publicly available from the [CISAustralia Industry Research web pages](#).

The initial survey in April 2020 assessed the immediate impacts of COVID-19 on Learning Abroad at Australian Universities. Subsequent versions ([2.0](#), 2020 - [7.0](#), 2024) built on these results, analysing changes and benchmarking institutional feedback. The goal of the survey is to assist universities to better understand the sector and what other institutions across Australia are doing or considering in the Learning Abroad space.



Methodology / Results

The following slides contain summarised data from the 2025 Learning Abroad Industry survey sent 17th June 2025. The survey was sent to all 40 Australian Universities with 36 institutions providing responses (a 90% response rate).

Results for the 2025 survey will (where possible) be benchmarked to all previous seven (7) surveys.

The response rate for each survey since inception (2020) has been between 87% - 97%, with the average response rate being 92.1%.

All survey data, including the past 7 surveys, can be located on the [CISaustralia Industry Research website](#). Information is collated and saved on behalf of the Learning Abroad sector.

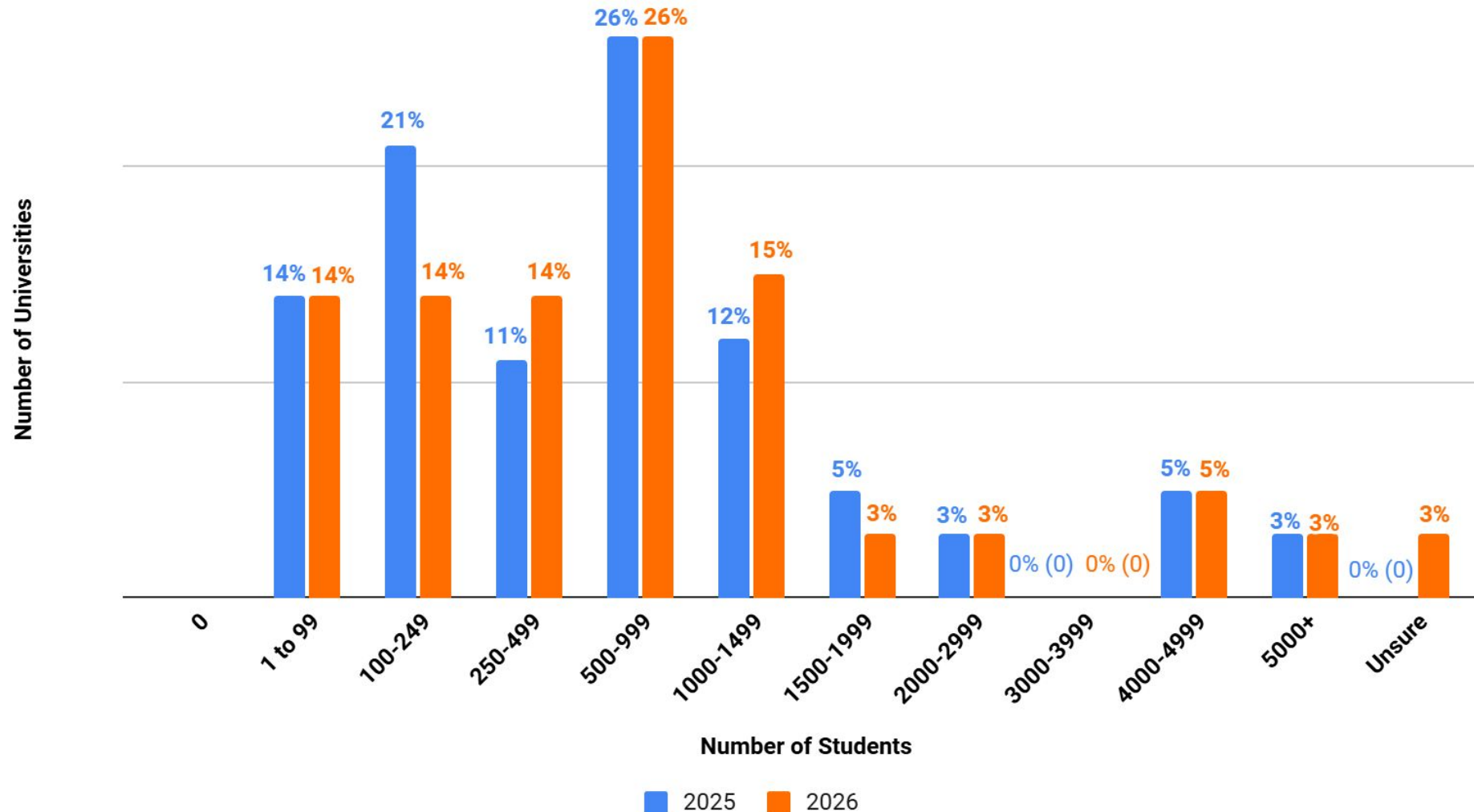
Response Rate

90%



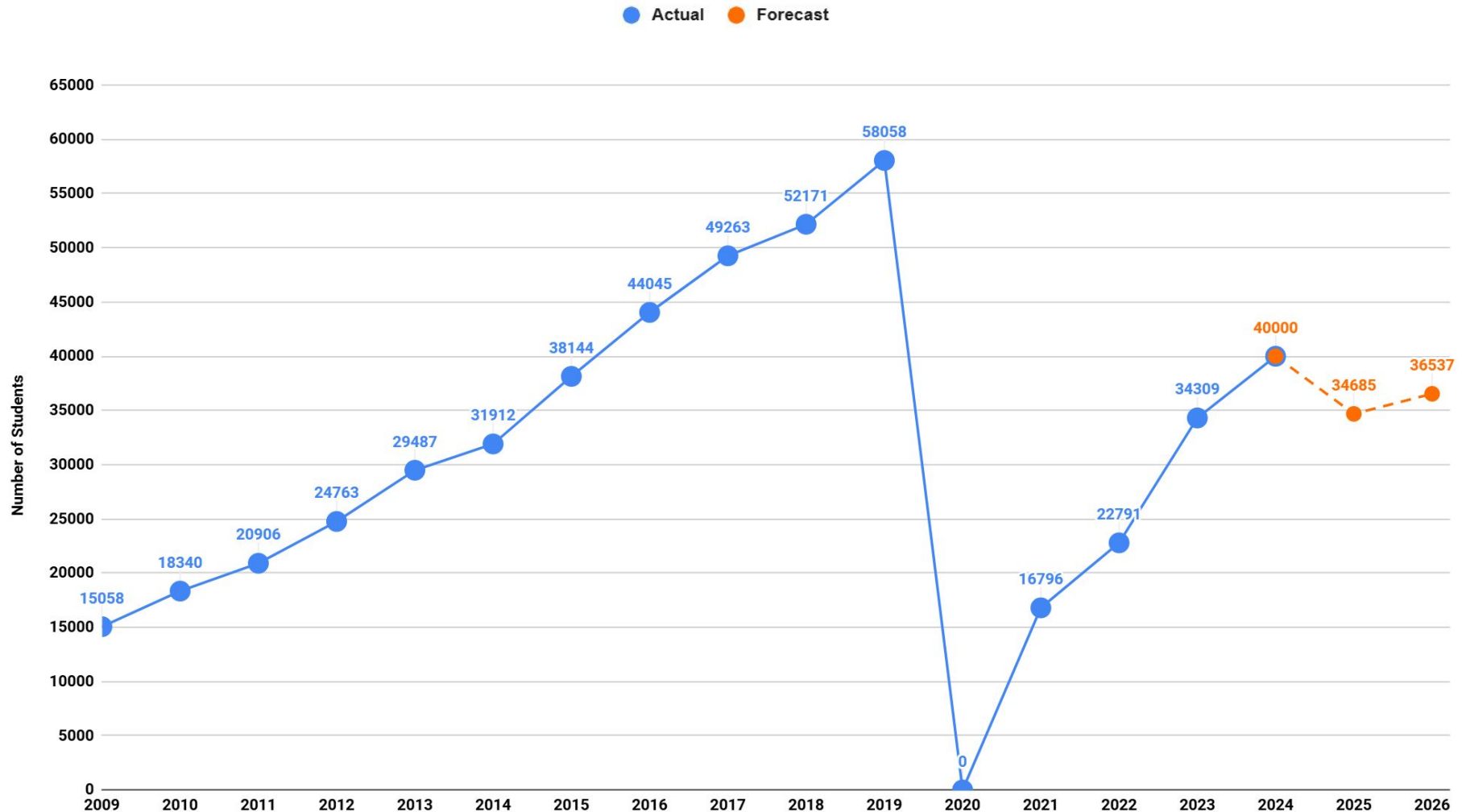
**Questions two and three were also verbally completed by one additional Australian University, thus making the completion rate on those two questions as 37 Universities (or 92.5%)*

Q2 & Q3: In 2025 and 2026, how many students do you expect to place overseas in an approved (for credit) study, intern, volunteer, exchange, or other Learning Abroad (outbound) program?



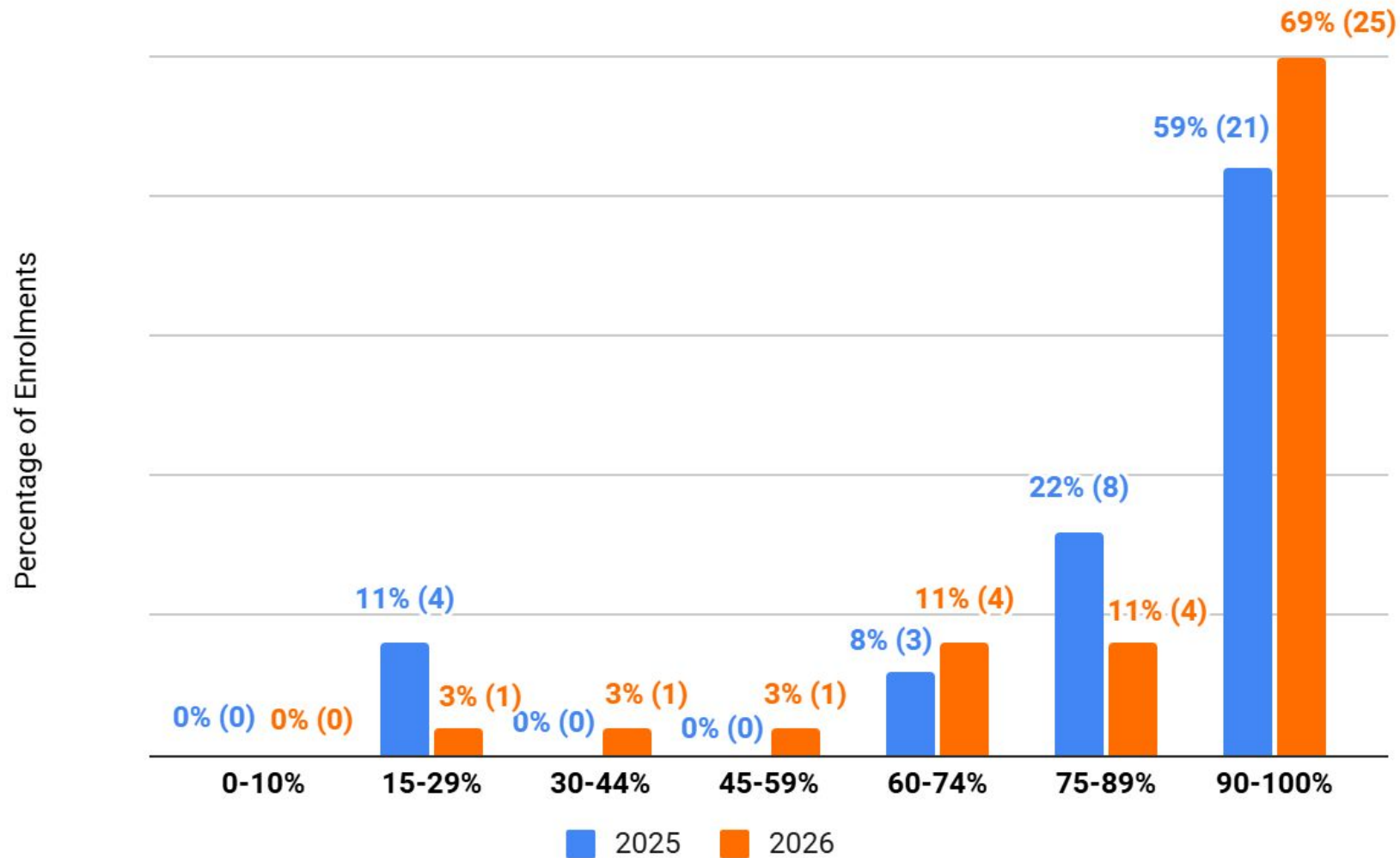
of Responses: 37 | Response Rate: 100%

Participation by Students from Australian Universities (Outbound Mobility) in Learning Abroad Programs: 2009 - 2026



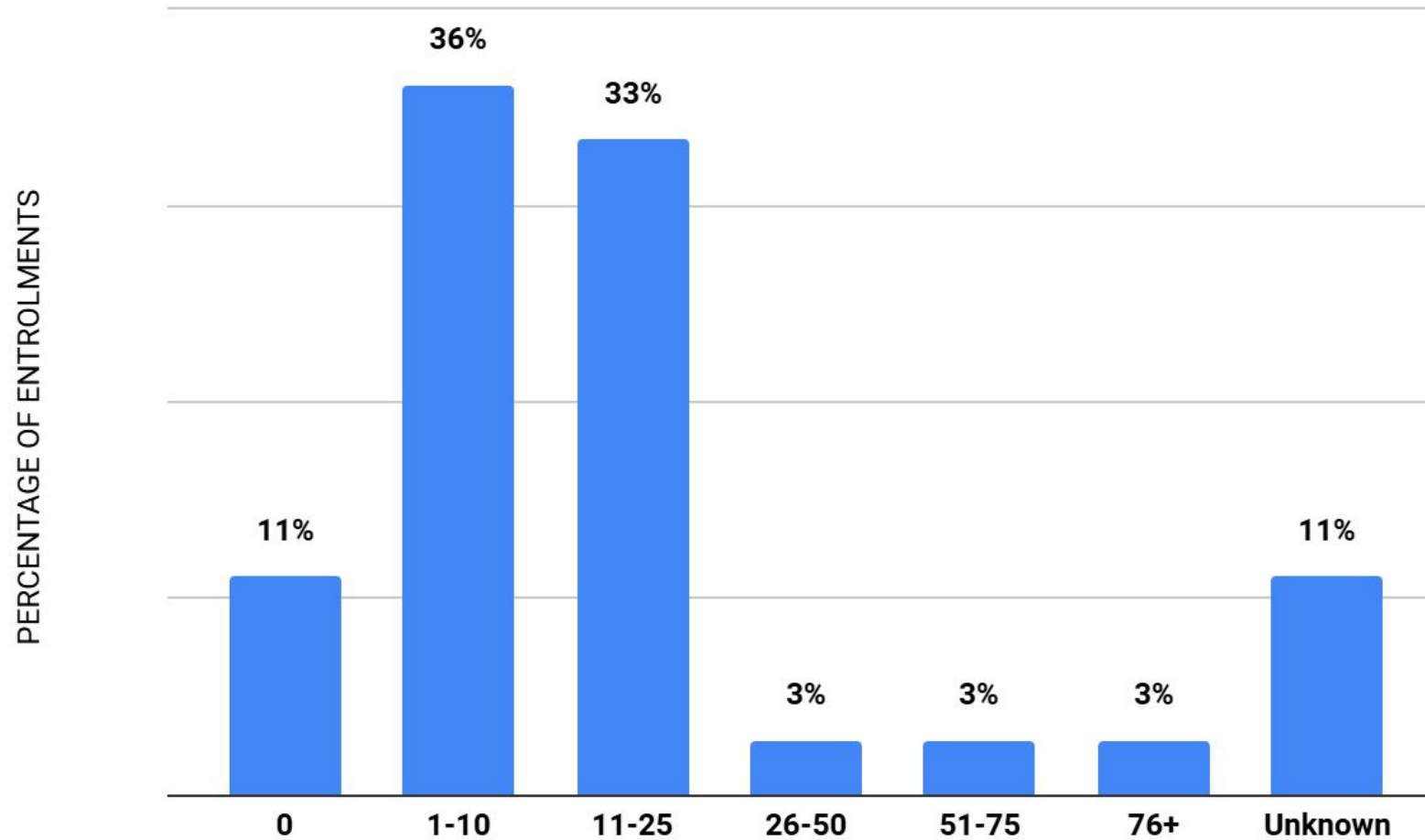
*2026 projected University figures were collated before the changes to the 2025 NCP Guidelines

Q4. Approximately what percentage of your outbound student cohort in 2026 do you expect to participate in approved Learning Abroad programs FOR ACADEMIC CREDIT?



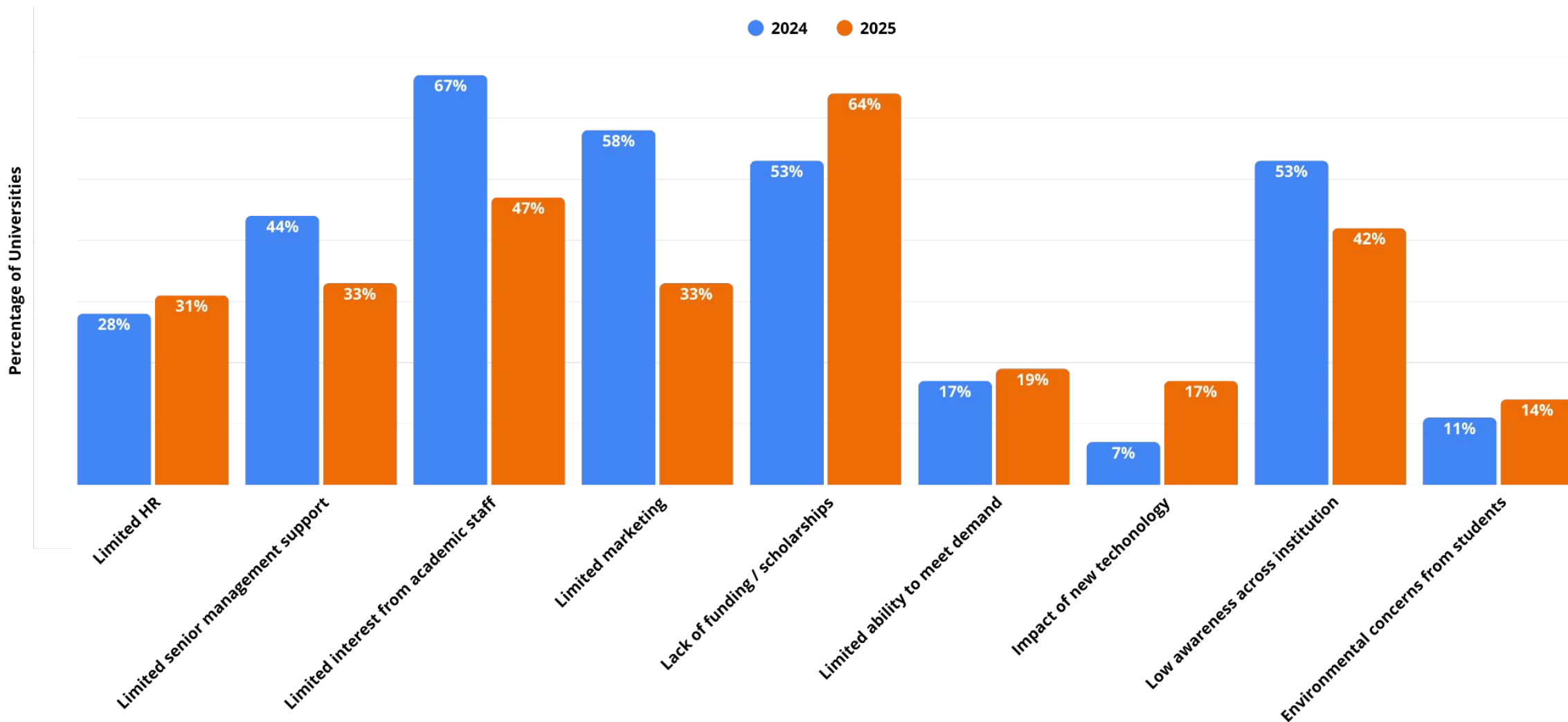
of Responses: 36 | Response Rate: 100%

Q5. In 2025, how many Learning Abroad (outbound) enrolments from your institution identify as Aboriginal and/or Torres Strait Islander?



of Responses: 36 | Response Rate: 100%

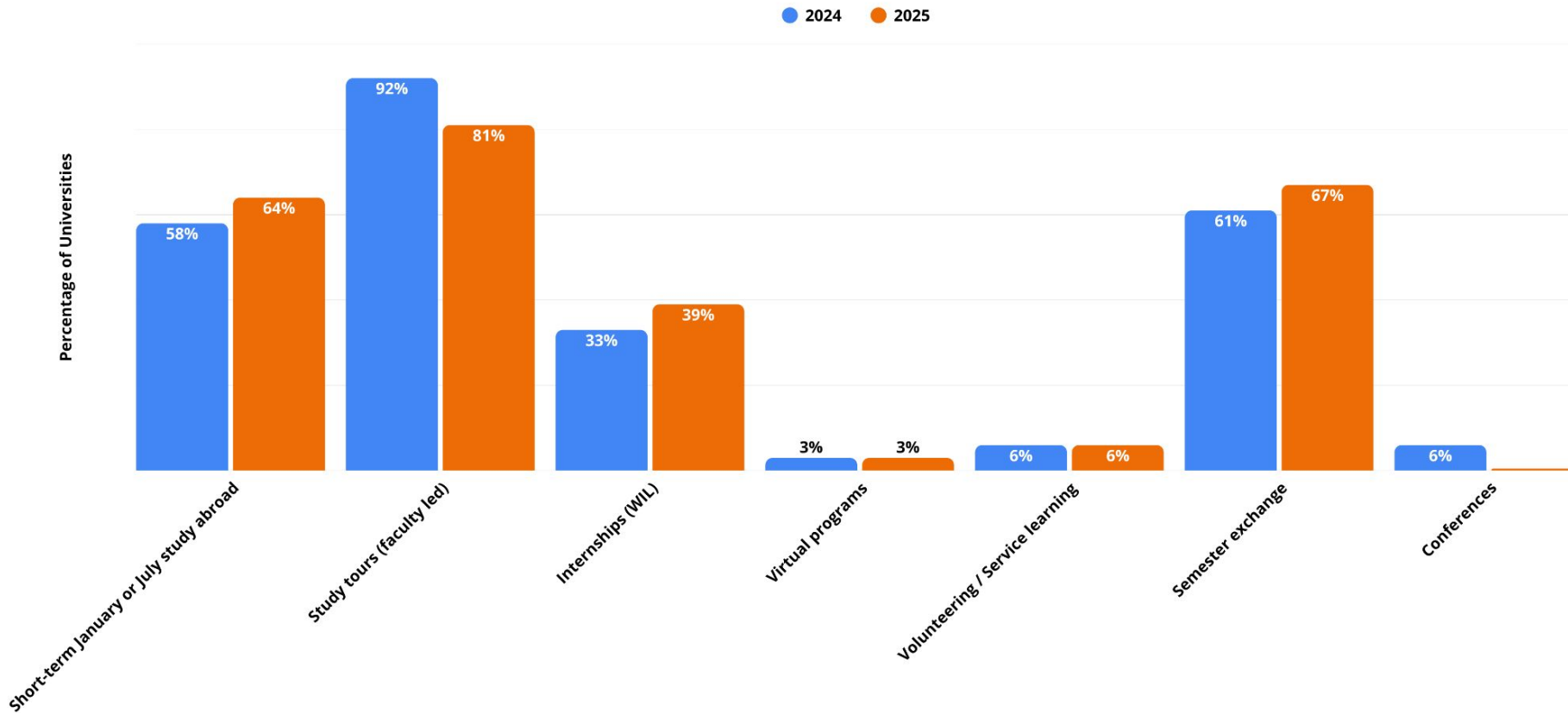
Q6. What are the biggest barriers that will limit your institution's Learning Abroad (outbound) enrolment levels in 2025?



of Responses: 36 | Response Rate: 100%

Figures show the % of institutions that rated each option as either, '4-Important' or '5 - Very important'.

Q7. What will be your students' least popular to most popular type of Learning Abroad (outbound) programming at your institution in 2025?



Other popular forms of programming not listed?

- Clinical placements
- NCP study tours
- Offshore campus based models
- Dual-degree program(s) with 1 year of outbound exchange

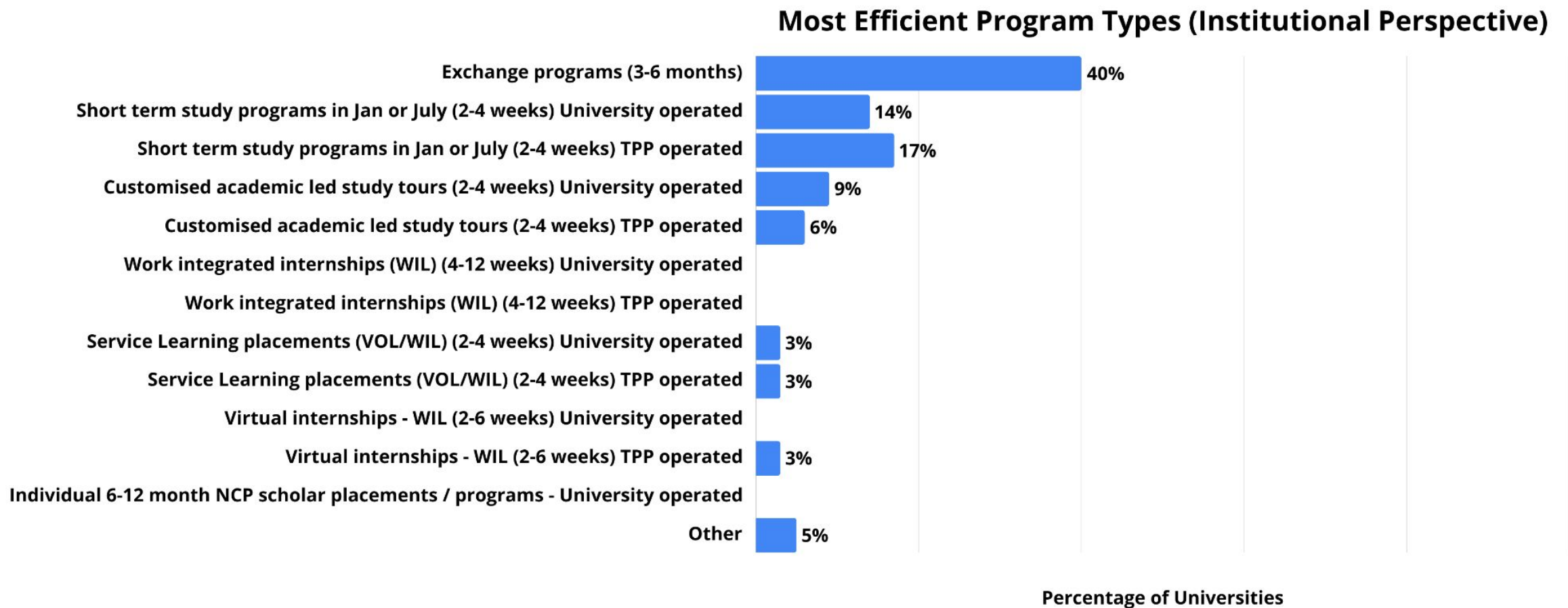
Key university themes:

- Short-term programs preferred
- Student demographics influence uptake
- Semester exchange remains challenging
- Marketing and promotion barriers
- Three trimester universities
- Virtual and blended programs declining
- Internships and employability options growing
- Institution-led and embedded programs

of Responses: 36 | Response Rate: 100%

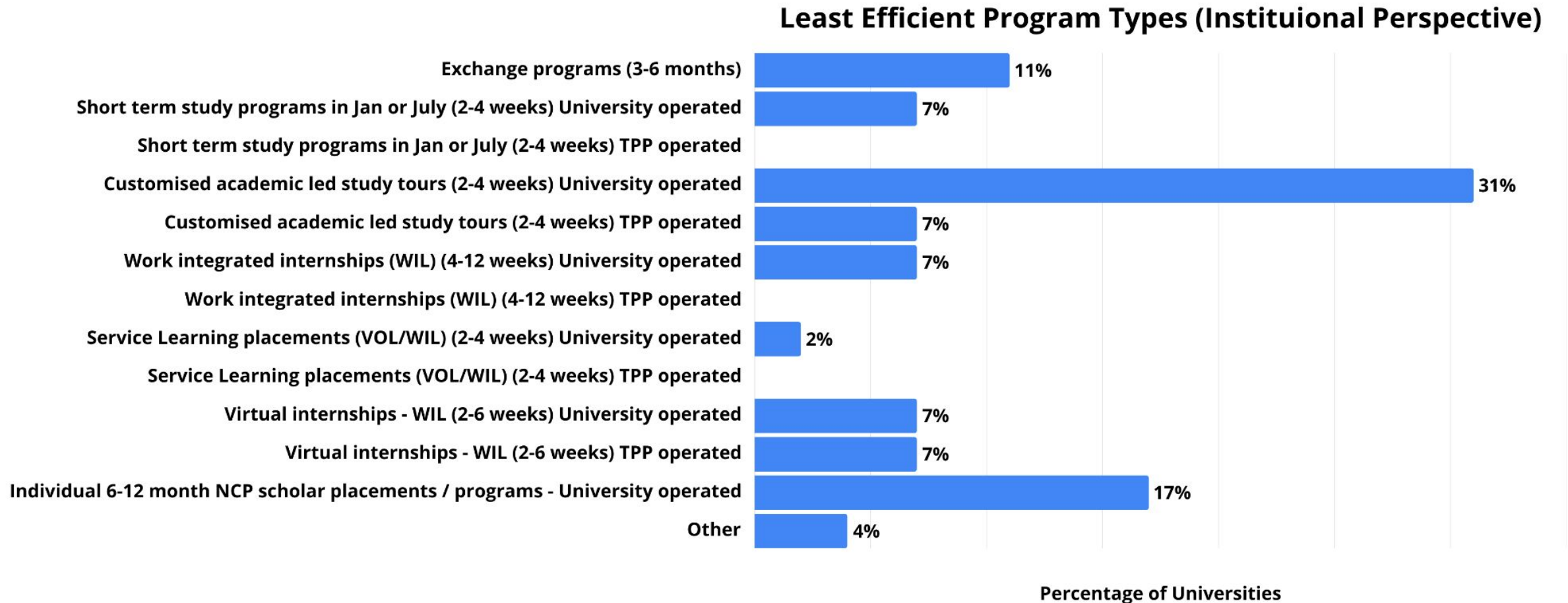
Figures show the % of institutions that rated each option as either, '4-Important' or '5 - Very important'.

Q8. From an institutional perspective, which type of Learning Abroad (outbound) program do you consider THE MOST efficient for your institution to deliver in terms of staffing and cost?



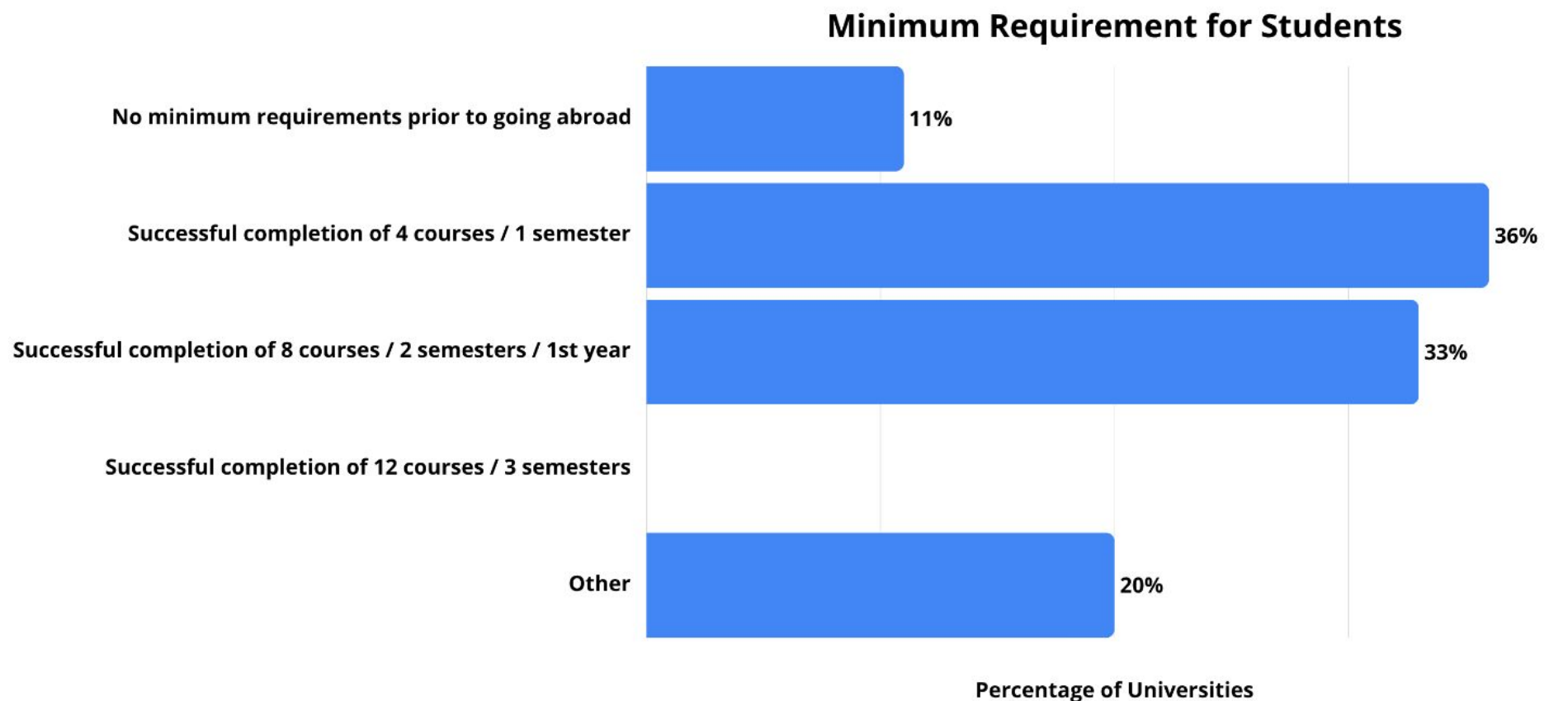
of Responses: 36 | Response Rate: 100%

Q8a. From an institutional perspective, which type of Learning Abroad (outbound) program do you consider LEAST efficient for your institution to deliver in terms of staffing and cost?



of Responses: 36 | Response Rate: 100%

Q9. What is the minimum requirement for students at your institution, in terms of courses or semester to complete prior to being approved to attend their Learning Abroad (outbound) program?



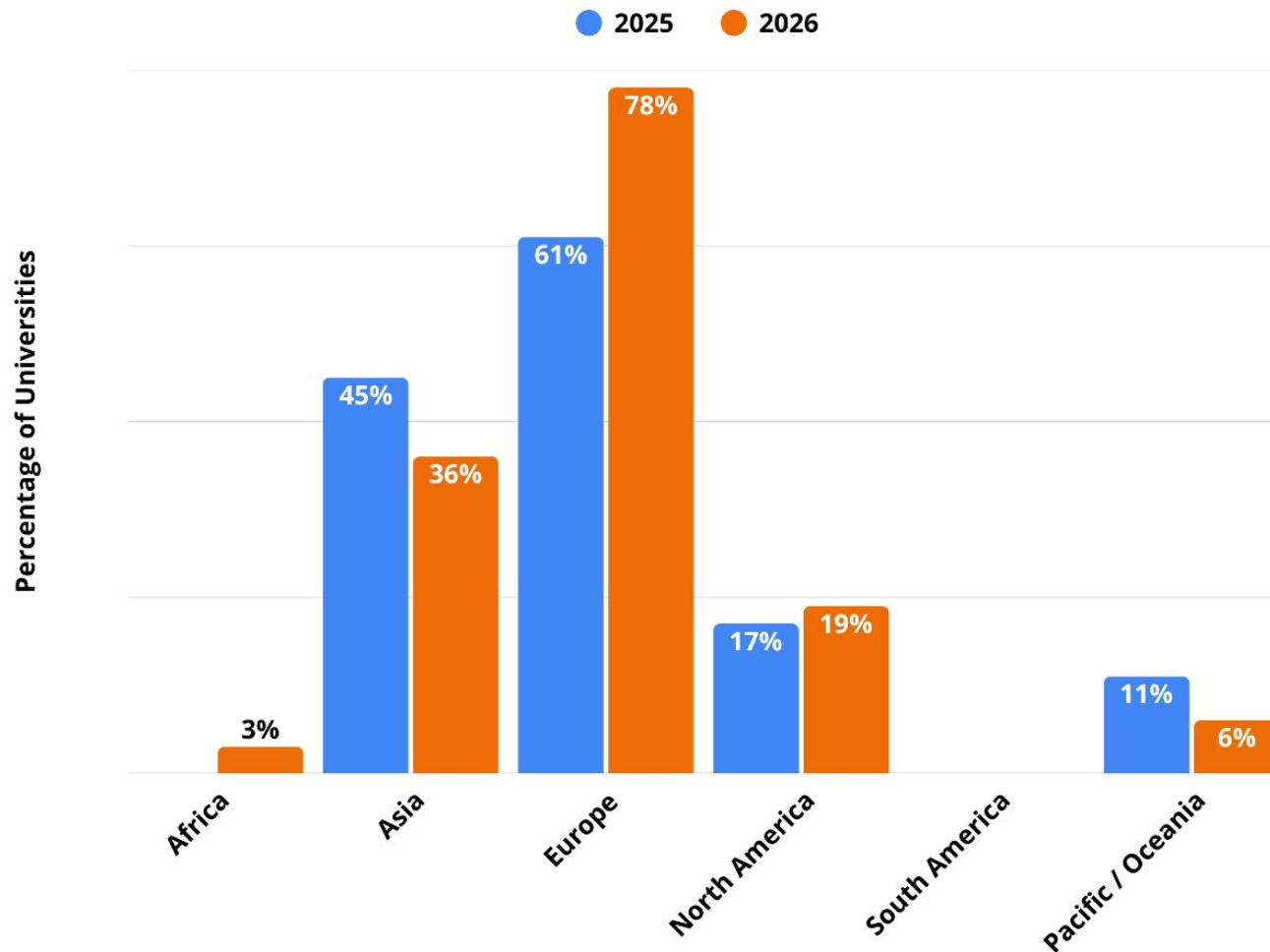
Comments:

- Varies depending on program, activity and / or experience
- Different for short term or semester exchange
- Completion of 3 subjects with min. passing GPA at the time of Learning Abroad application

of Responses: 36 | Response Rate: 100%

Q10. What do you believe will be your students' most popular Learning Abroad (outbound) region for your institution in 2026?

Most Popular Regions (Institutional Perspective)



of Responses: 36 | Response Rate: 100%

Key university insights:

- **Europe (UK, France, Netherlands)** continues to be the most popular region – seen as culturally accessible, English-speaking and well-supported academically
- **Asia's popularity is strongly linked to government funding** (e.g. NCP) and affordability – especially for short-term faculty-led programs
- **North America is seeing a shift:** USA, Canada and Mexico – attributed to cost & safety concerns
- **English-speaking countries preferred** for exchanges due to ease of communication and academic fit
- **Language programs and specialist degrees** (e.g. Languages, Veterinary Science) shape regional preferences based on existing partnerships
- **Africa and South America** remain low in popularity – often due to lack of promotion or program availability, except for niche placements
- **Proximity and affordability:** students often favour nearby regions like Asia or the Pacific due to lower travel cost /and / or higher funding
- **Government funding shapes participation trends:** Institutions noted that removing NCP funding would significantly reduce interest in Indo-Pacific regions

Q11. What will be your institution's most popular NCP funded Learning Abroad program locations in 2026?

Country	% of Universities that ranked country as either "4" or "5 – Very Popular"
Japan	81%
Republic of Korea	50%
Indonesia	42%
Singapore	33%
China	28%
Fiji	25%
Vietnam	25%
Hong Kong	22%
India	22%
Malaysia	19%
Vanuatu	11%
Philippines	11%
Cambodia	11%

of Responses: 36 | Response Rate: 100%

Q12. What will be your most popular non-NCP funded Learning Abroad program locations in 2026?

Country	% of Universities that ranked country as either "4" or "5 – Very Popular"
England	89%
USA	47%
Canda	47%
Netherlands	47%
France	39%
Italy	36%
Scotland	36%
Scandinavia	33%
Ireland	31%
Germany	31%
Spain	25%
Wales	8%

of Responses: 36 | Response Rate: 100%

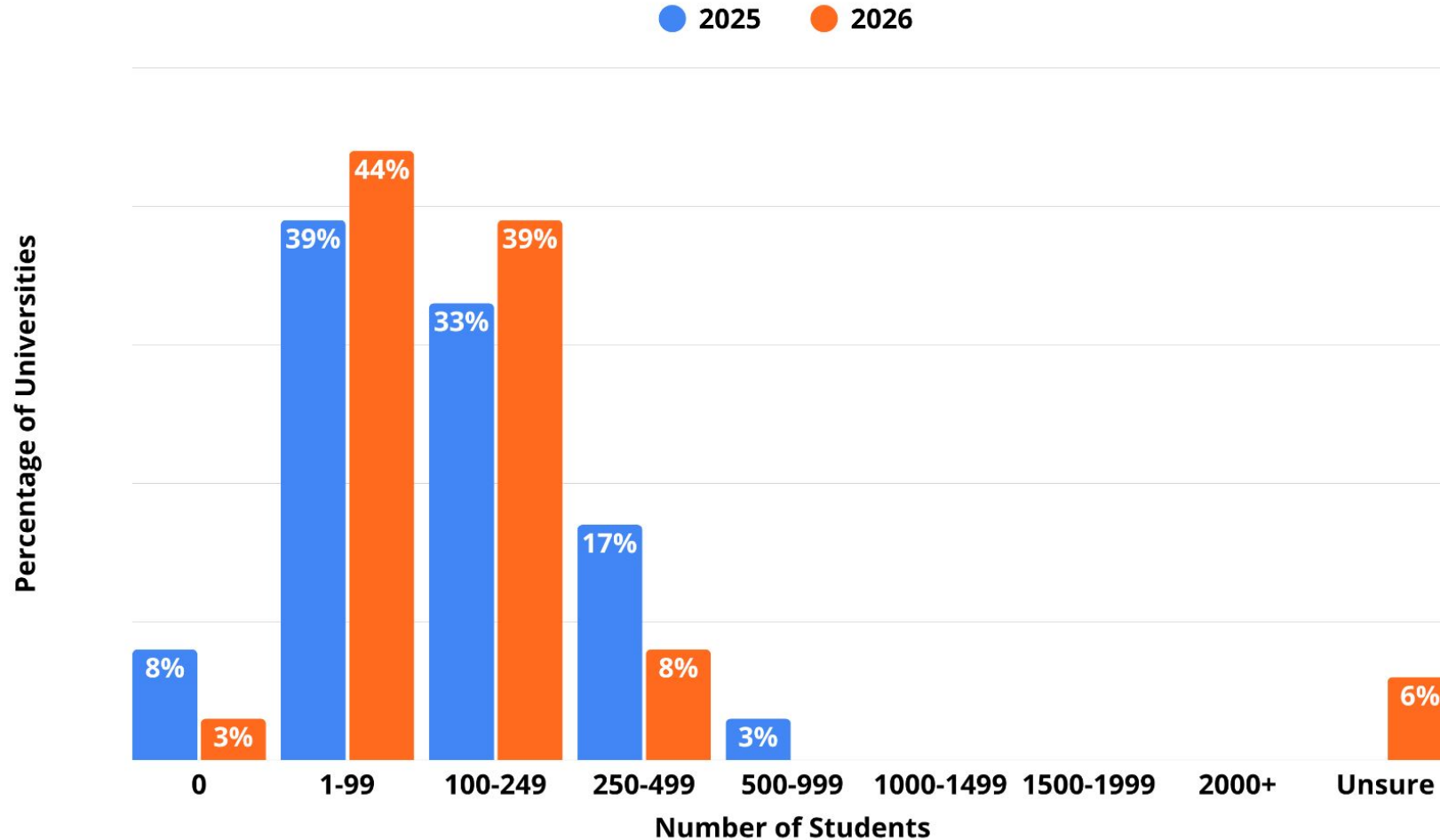
University Insights on NCP Country Rankings

- Rankings largely based on **previous program activity and partnerships**.
- **Institutions unsure of 2026** due to pending NCP guidelines or reduced / fluctuating interest
- **Short-term, faculty-led clinical placements** continue to drive demand in key Indo-Pacific countries
- Smaller institutions focus on **strategic engagement** in fewer locations due to resourcing
- Some programs / institutions shifting away from NCP, **with a focus on semester exchange options or self-funded / OS-HELP models**

University Insights on non-NCP Country Rankings

- **UK, Europe, and Canada** remain consistently popular – especially for semester exchange
- Rankings reflect **established partnerships**, strong student demand, and program history
- **Student preferences, word of mouth**, and **security or location** all influence destination choices
- Some short-term programs (e.g. Nepal, Indonesia) **transitioning to self-funded** after previous NCP support
- **USA has shifted** in popularity; growth seen in **Canada, Germany, France** for internships and exchanges

Q13. How many students do you expect to send overseas on Learning Abroad programs with NCP support funding e.g. NCP scholarships or funded group programs in 2025 and 2026?

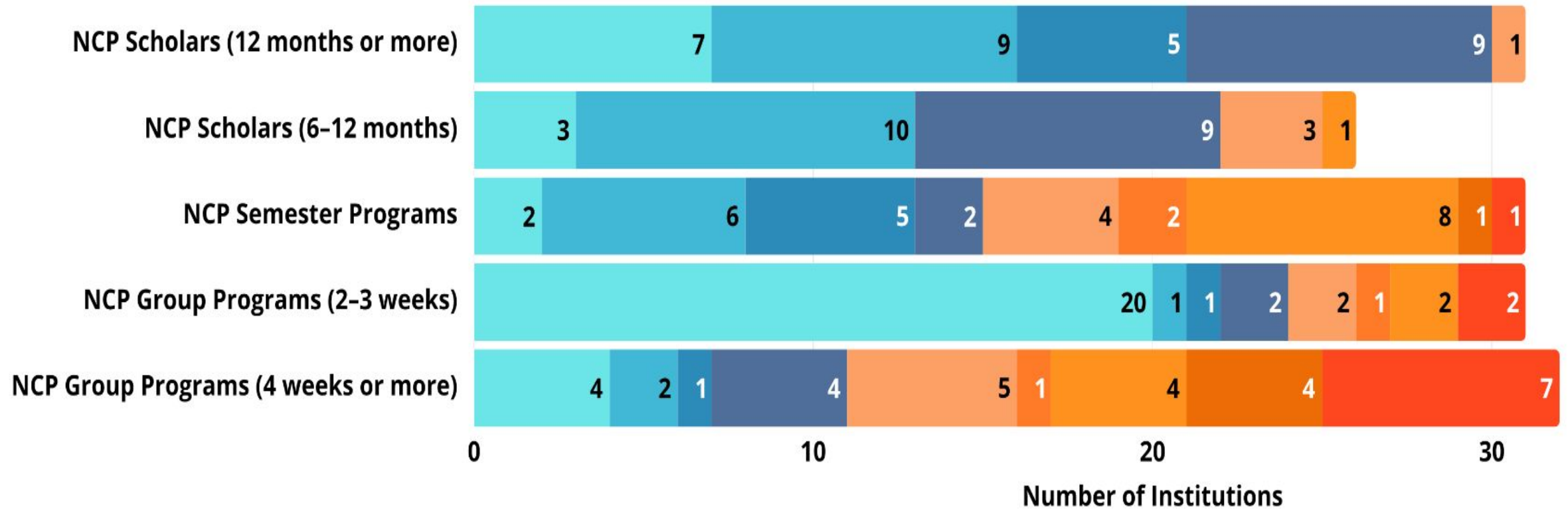


of Responses: 36 | Response Rate: 100%

Q14. In 2026, how many NCP funded students do you expect to place in each of the following program types?

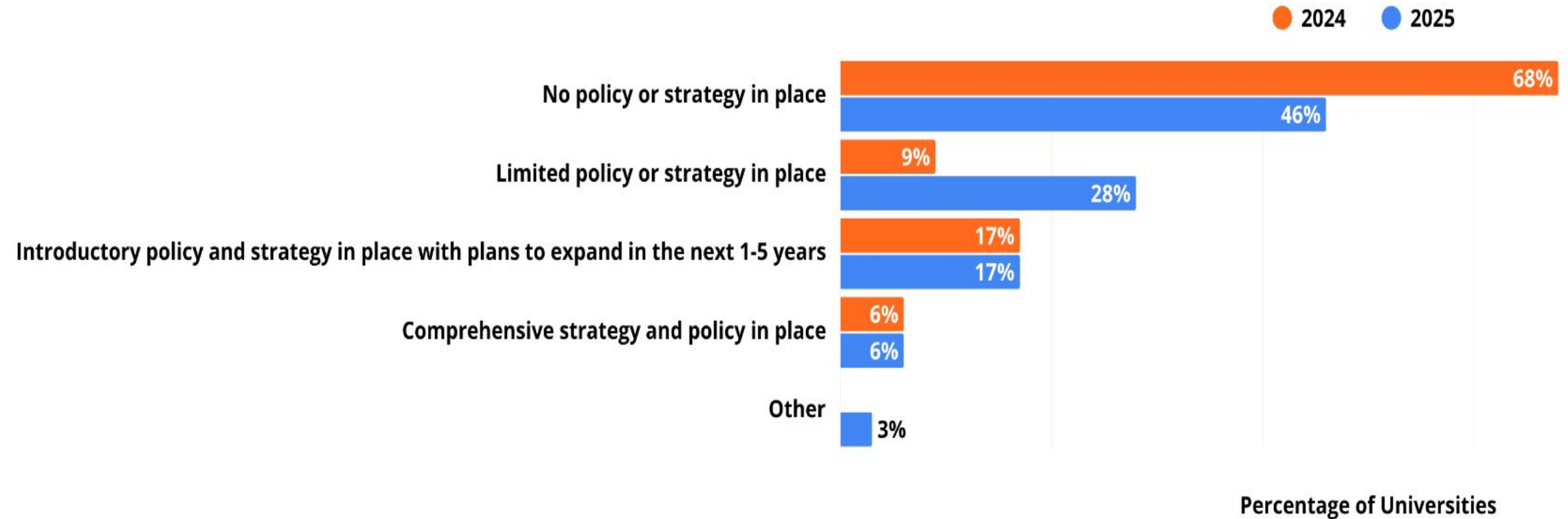
Expected Number of NCP-Funded Students by Program Type

0 1-3 4-5 6-10 11-15 16-20 21-30 31-50 51+



of Responses: 31 | Response Rate: 86%

Q15. Has your institution put in place a policy or strategy in 2025 to offset the impact of carbon emissions on the environment as a result of student travel?

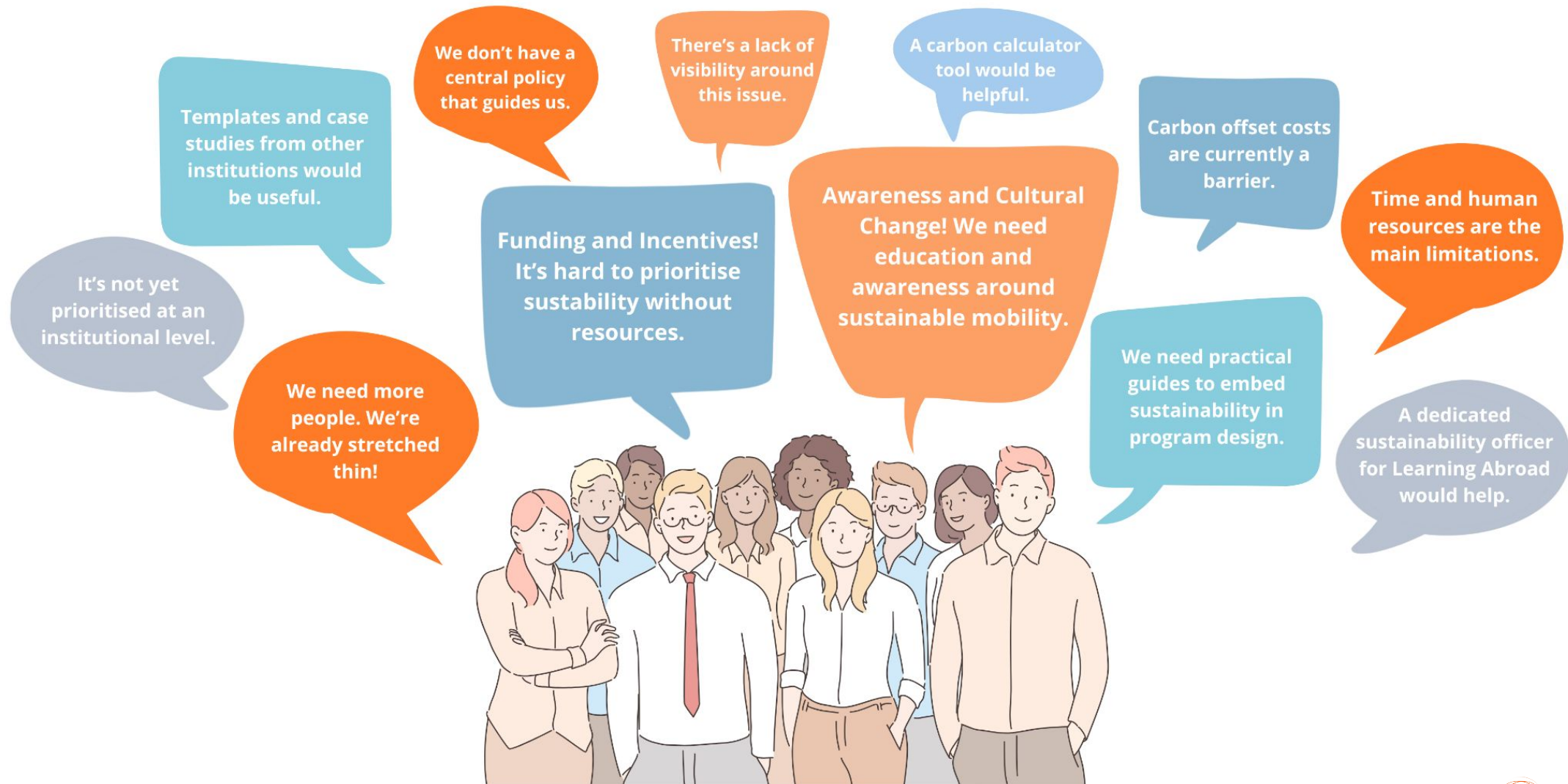


of Responses: 36 | Response Rate: 100%

Comments:

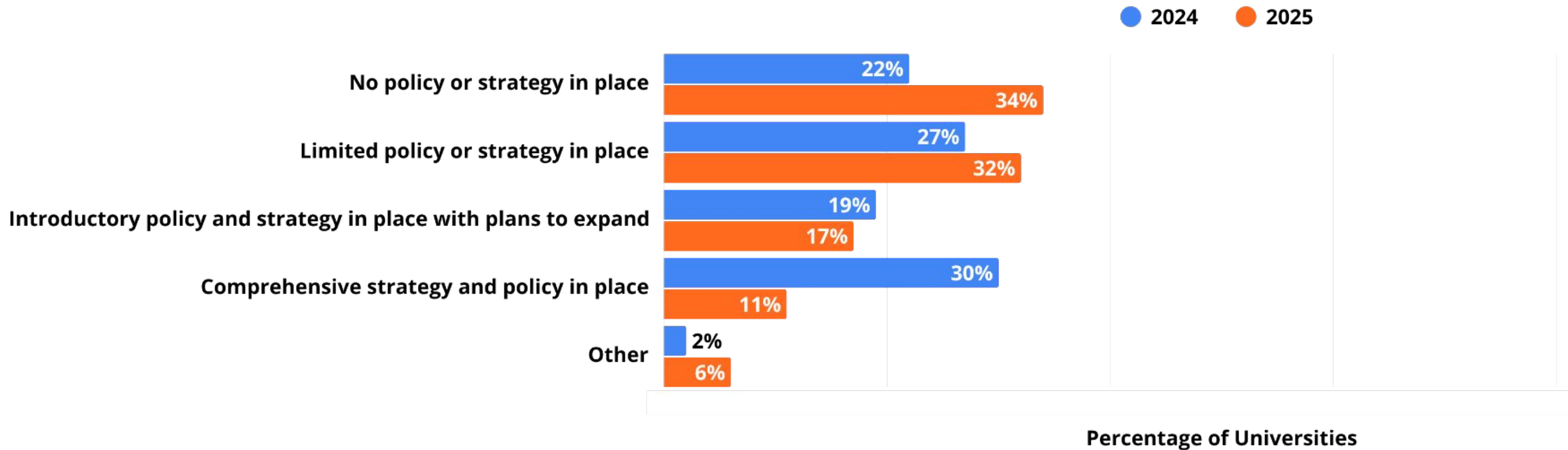
- The university's Sustainability Policy highlights its commitment to environmental, social, and economic sustainability, aligned with the UN Sustainable Development Goals.
- While broad objectives are available, no specific 2025 measures to offset student travel emissions are outlined.

Q16. What resources does your institution need to increase the focus and attention on environmental sustainability for Learning Abroad and make impactful change?



of Responses: 36 | Response Rate: 100%

Q17. Has your institution officially adopted any targets or strategies specifically focused on the UN's 17 Sustainable Development Goals that would offset the impact of Learning Abroad travel?

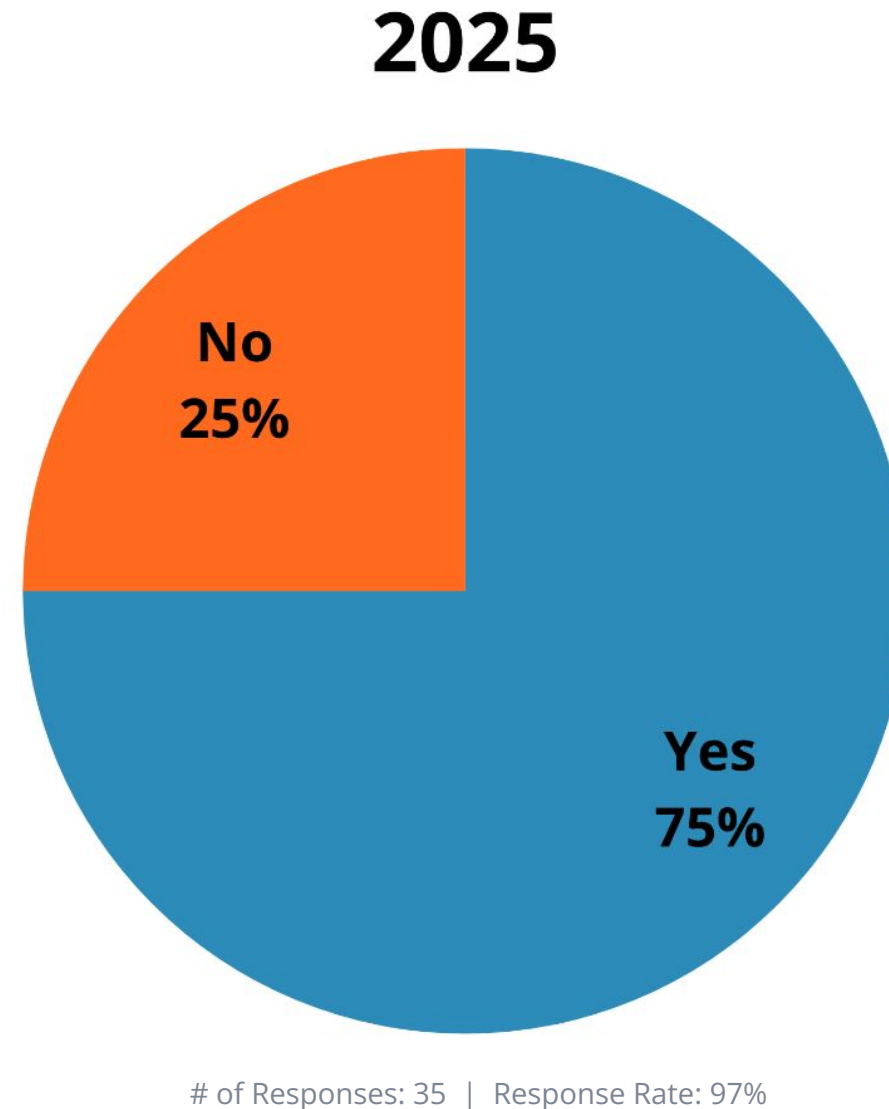
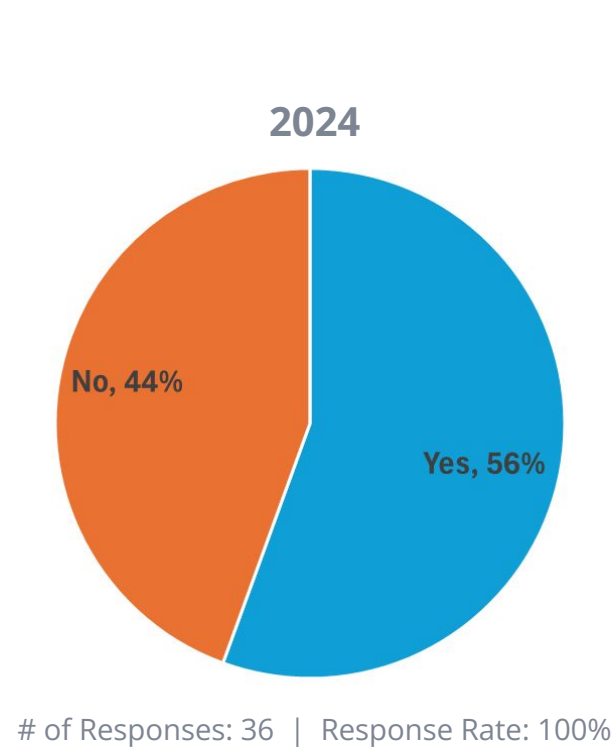


of Responses: 35 | Response Rate: 97%

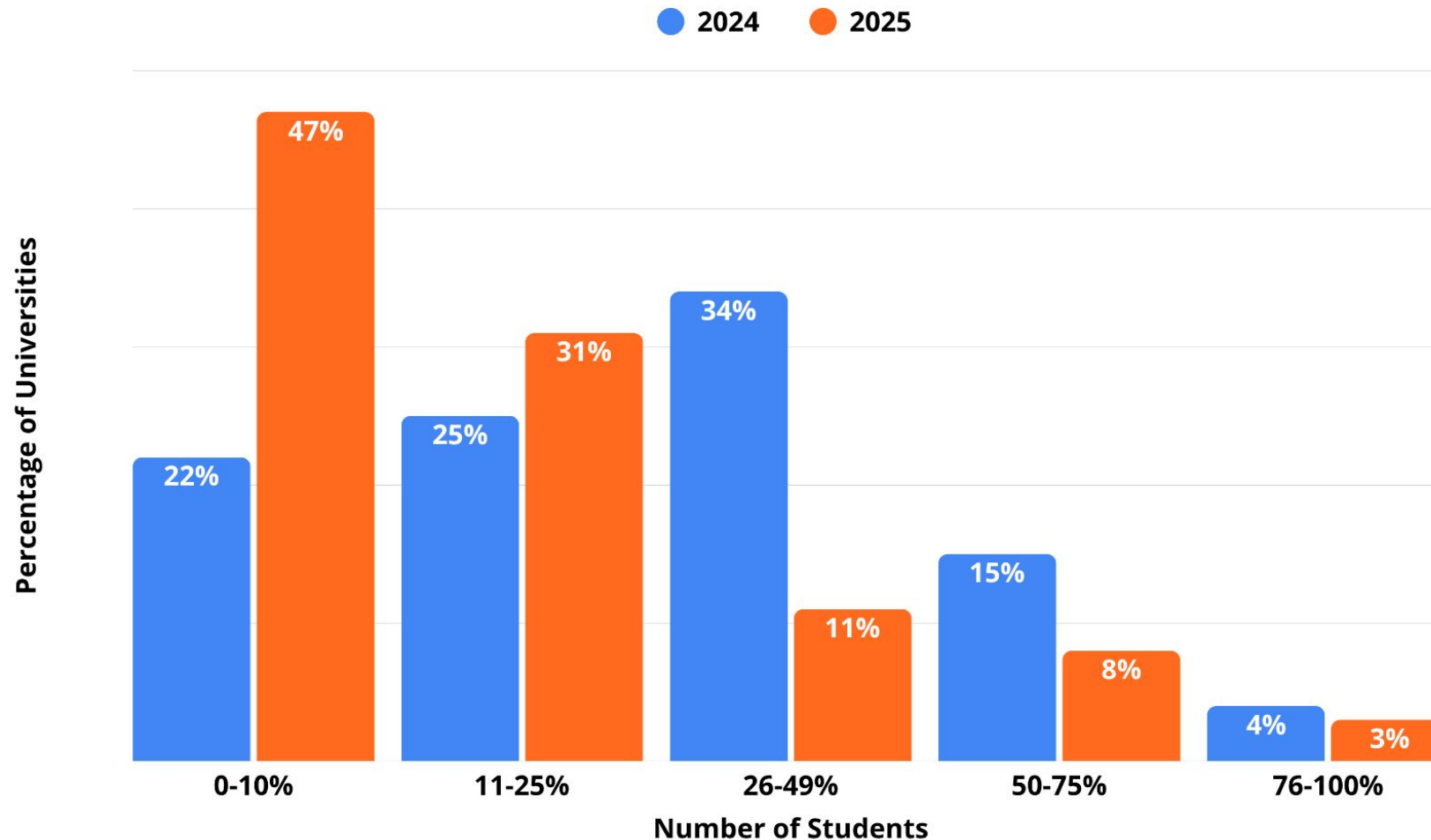
Comments:

- Yes, within the Sustainability Framework
- The university has a strategy on UN SDG goals but not necessarily measuring against Learning Abroad travel explicitly

Q18. Will your institution utilise the complimentary CISaustralia Green Book online resource as part of your pre-departure process (guides / sessions, etc.) for all Learning Abroad (outbound) students in 2025?

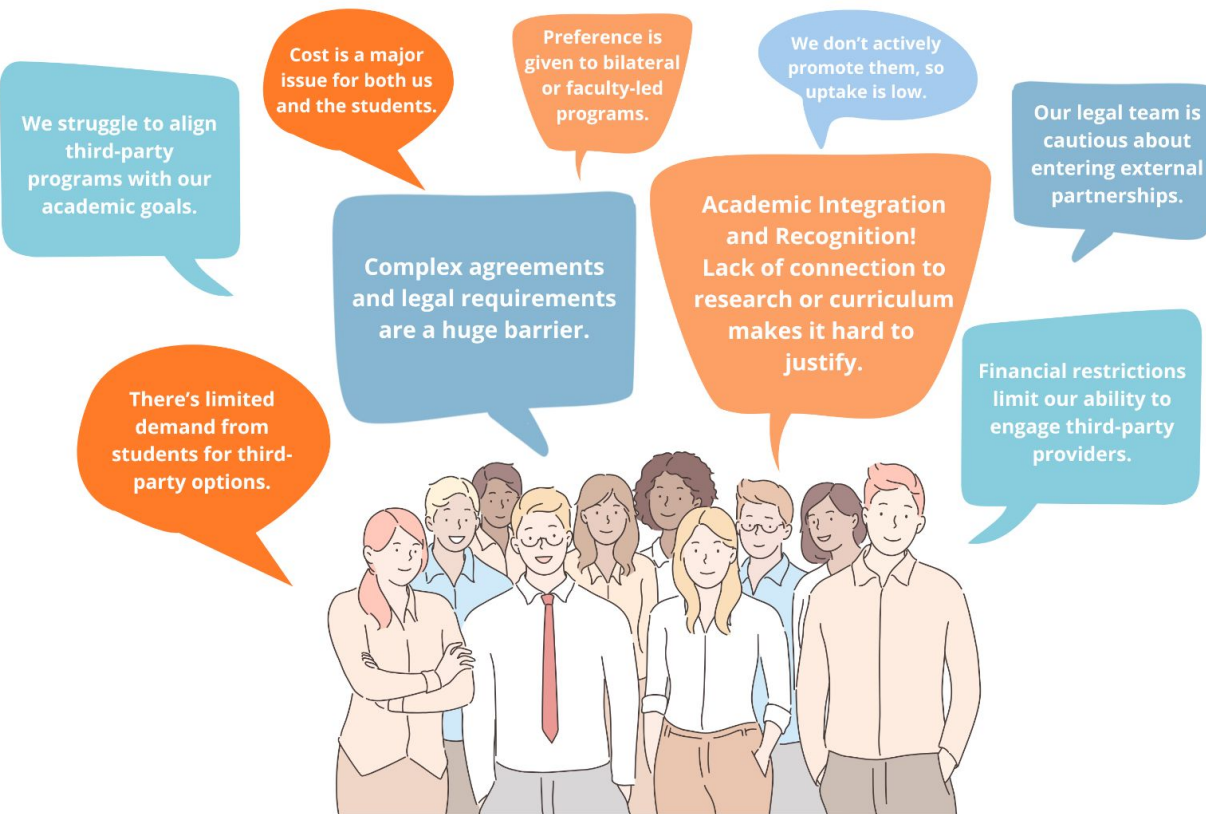


Q19. Approximately what percentage of your institution's Learning Abroad (outbound) student cohort in 2025 do you expect to go abroad through one of your approved Third-Party Providers (TPP)?



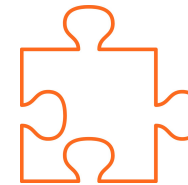
2024 # of Responses: 26 | Response Rate: 72%
2025 # of Responses: 36 | Response Rate: 100%

Q20. What are the *biggest challenges* your institution faces when working with Third-Party Providers on Learning Abroad programs?



of Responses: 28 | Response Rate: 77%

Q21. What would an *ideal partnership* with a Third-Party Provider look like for your institution?



Logistic & Operational Support



Access to Unique Destinations / Disciplines



Clear Communication & Responsiveness

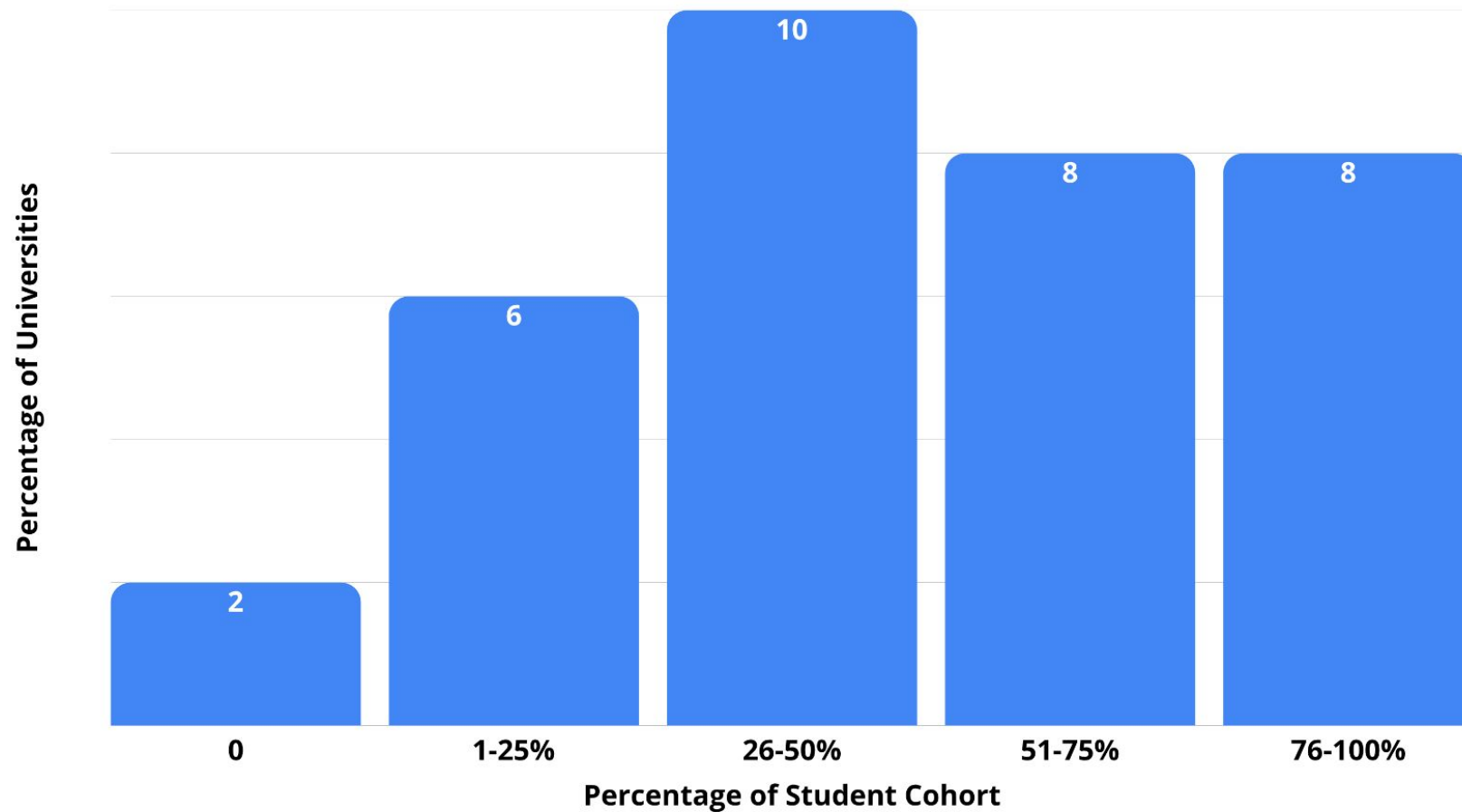


Academic Alignment & Customisation



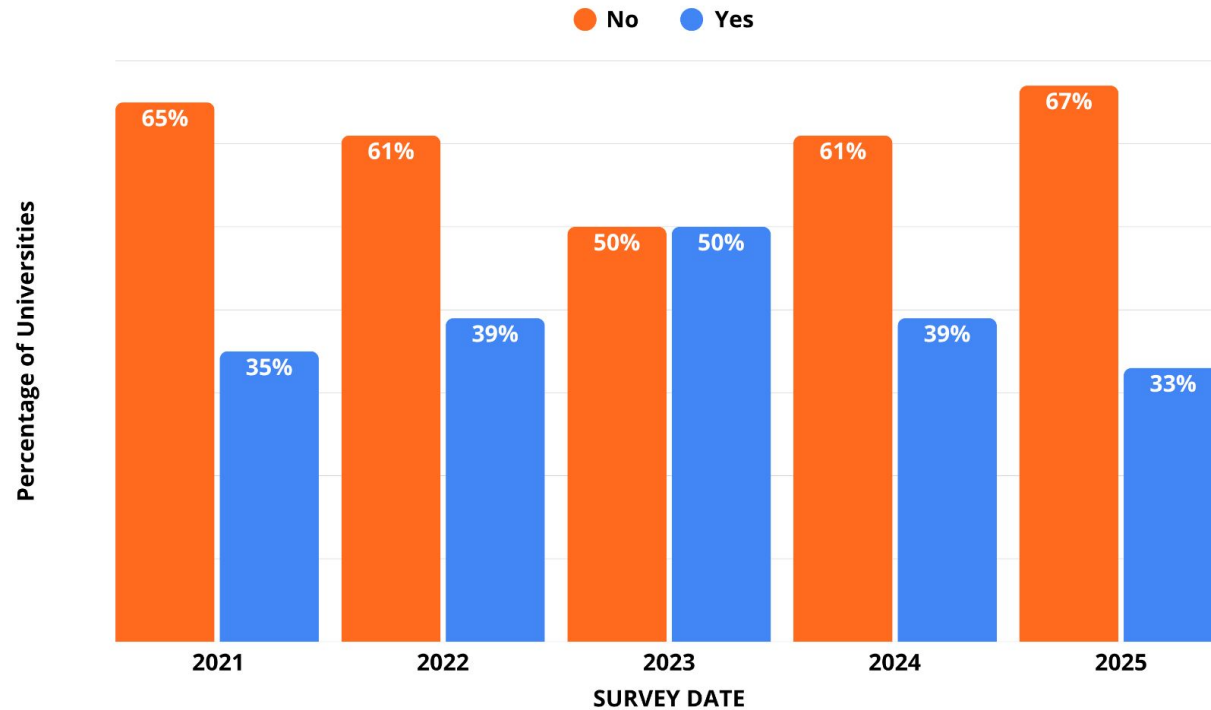
Trust & Collaborative Partnership

Q22. In 2025, approximately what percentage of your Learning Abroad (outbound) student cohort will utilise OS-HELP to fund their program?



of Responses: 34 | Response Rate: 94%

Q23. Have you employed any new Learning Abroad staff in the past 6 months?

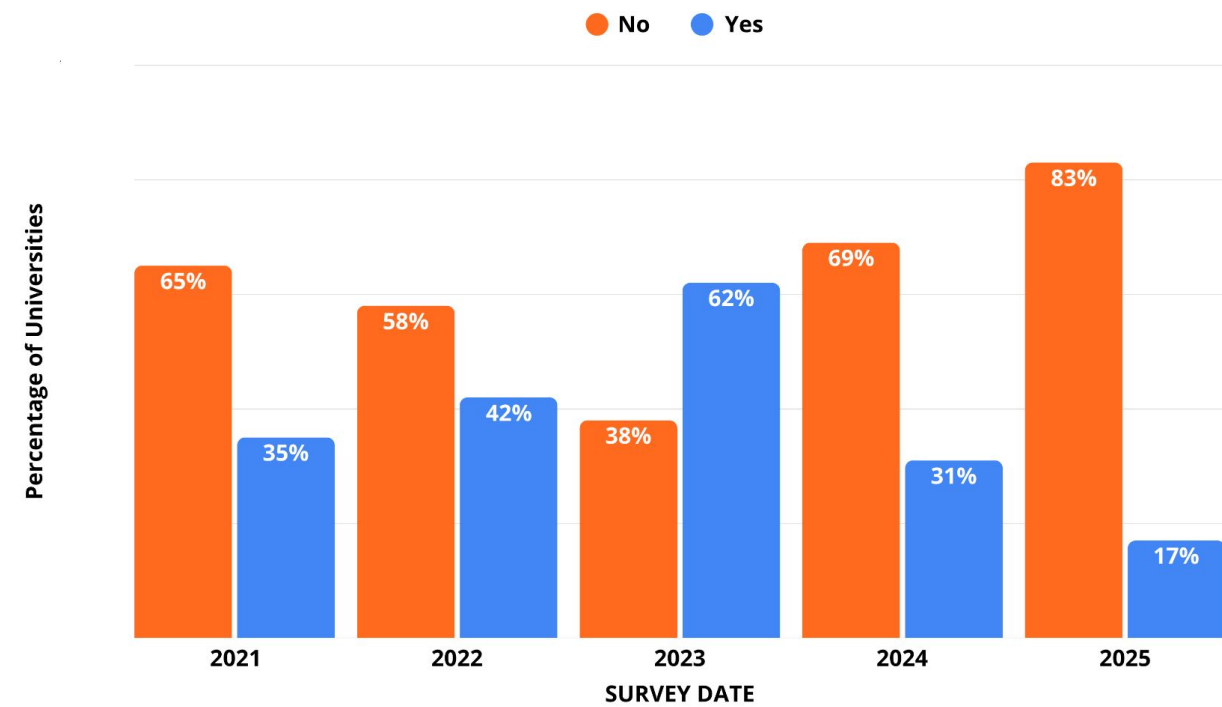


of Responses: 36 | Response Rate: 100%

If yes, how many:

- 1 (73%)
- 2 (18%)
- 3 (0%)
- 4 (9%)

Q24. Do you plan to employ any new Learning Abroad staff within the next 12 months?

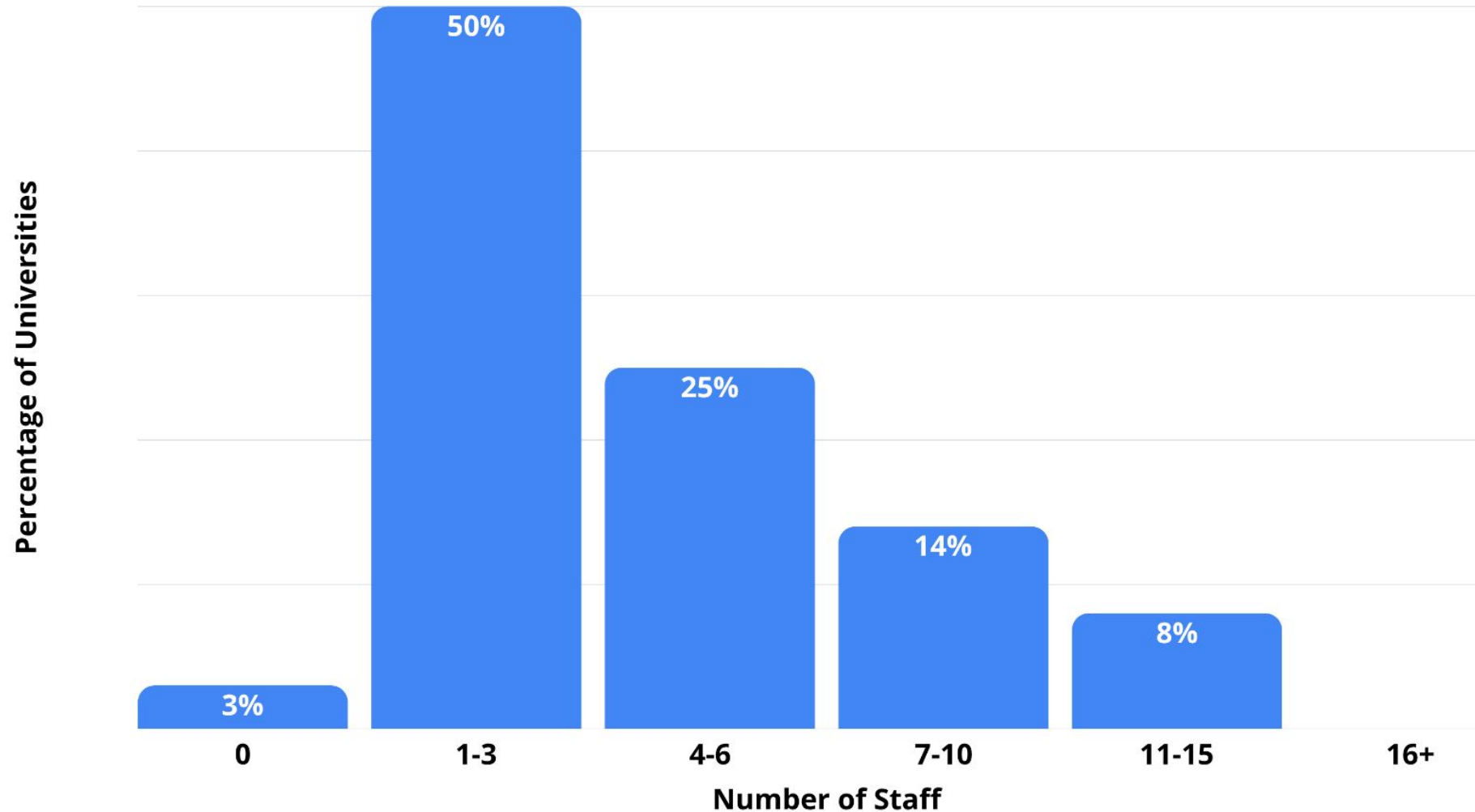


of Responses: 36 | Response Rate: 100%

If yes, how many:

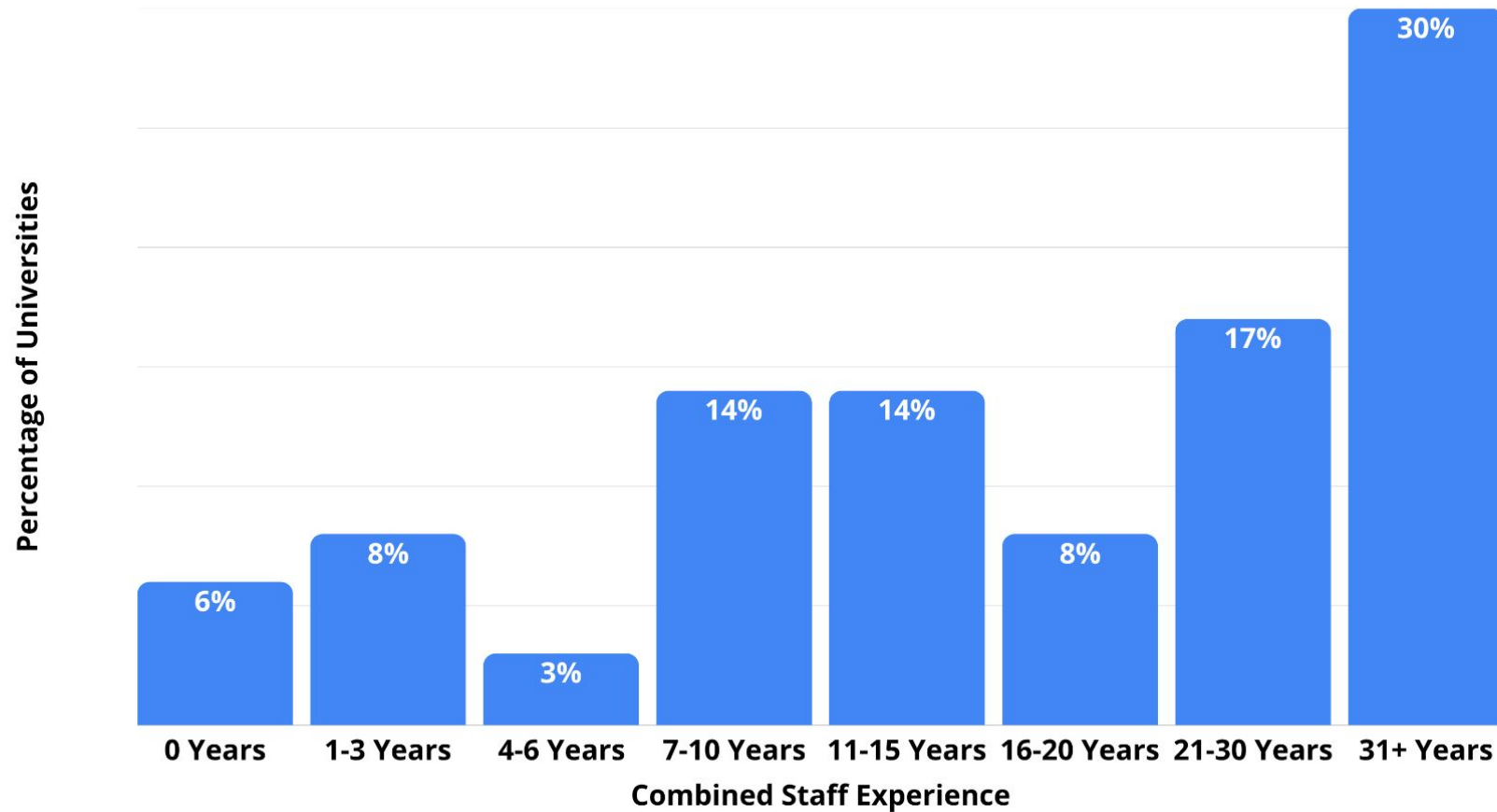
- 1 (67%)
- 2 (33%)
- 3 (0%)
- 4 (0%)

Q25. How many dedicated Full Time Equivalent (FTE) Learning Abroad (outbound) staff do you have in your institution?



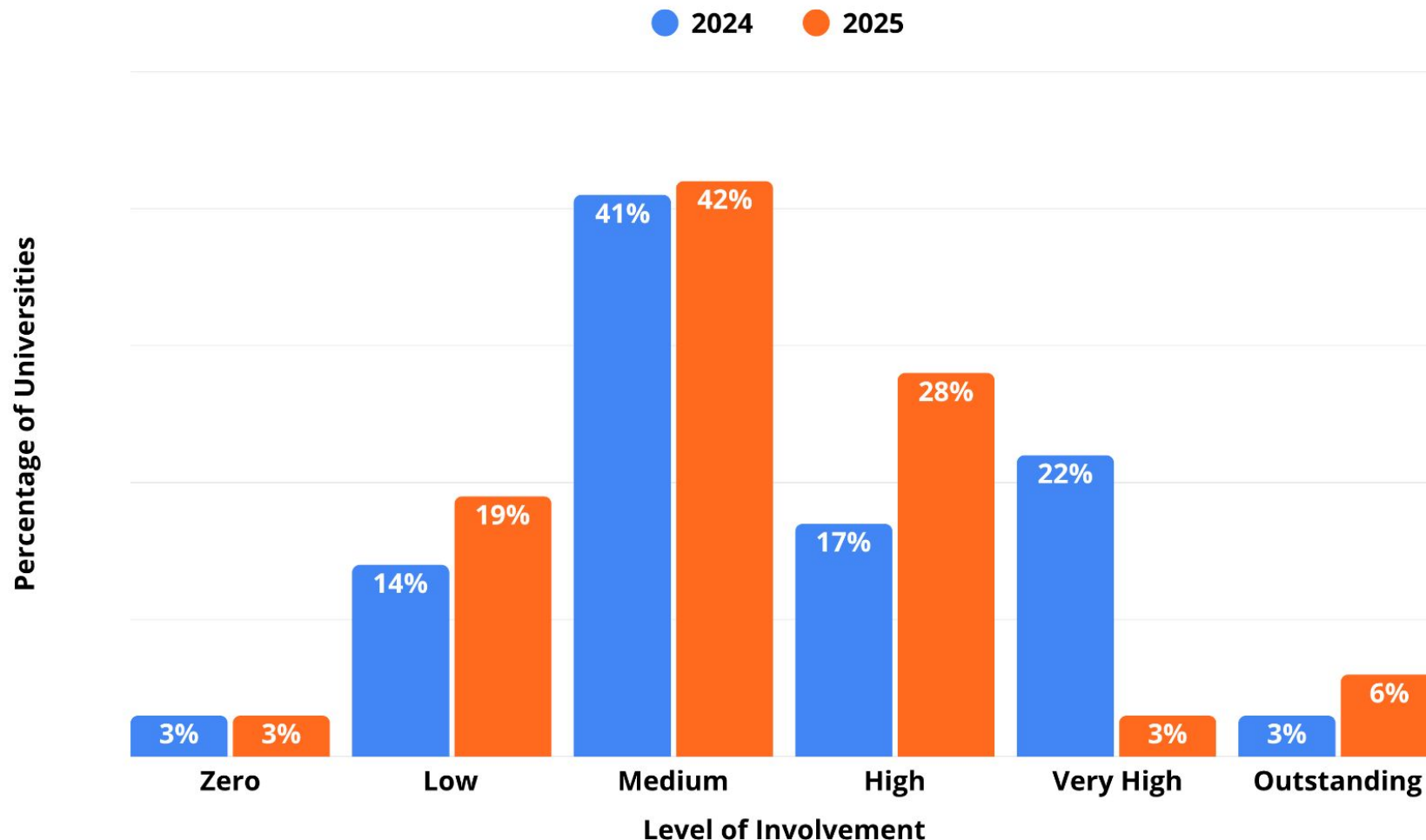
of Responses: 36 | Response Rate: 100%

Q25a. What is the combined length of time your staff have been involved in the Learning Abroad (outbound) Office within your institution?



of Responses: 36 | Response Rate: 100%

Q26 & 27. What level of involvement and support do you receive from your institution's senior management (Director and/or PVC-I) in relation to outbound Learning Abroad?

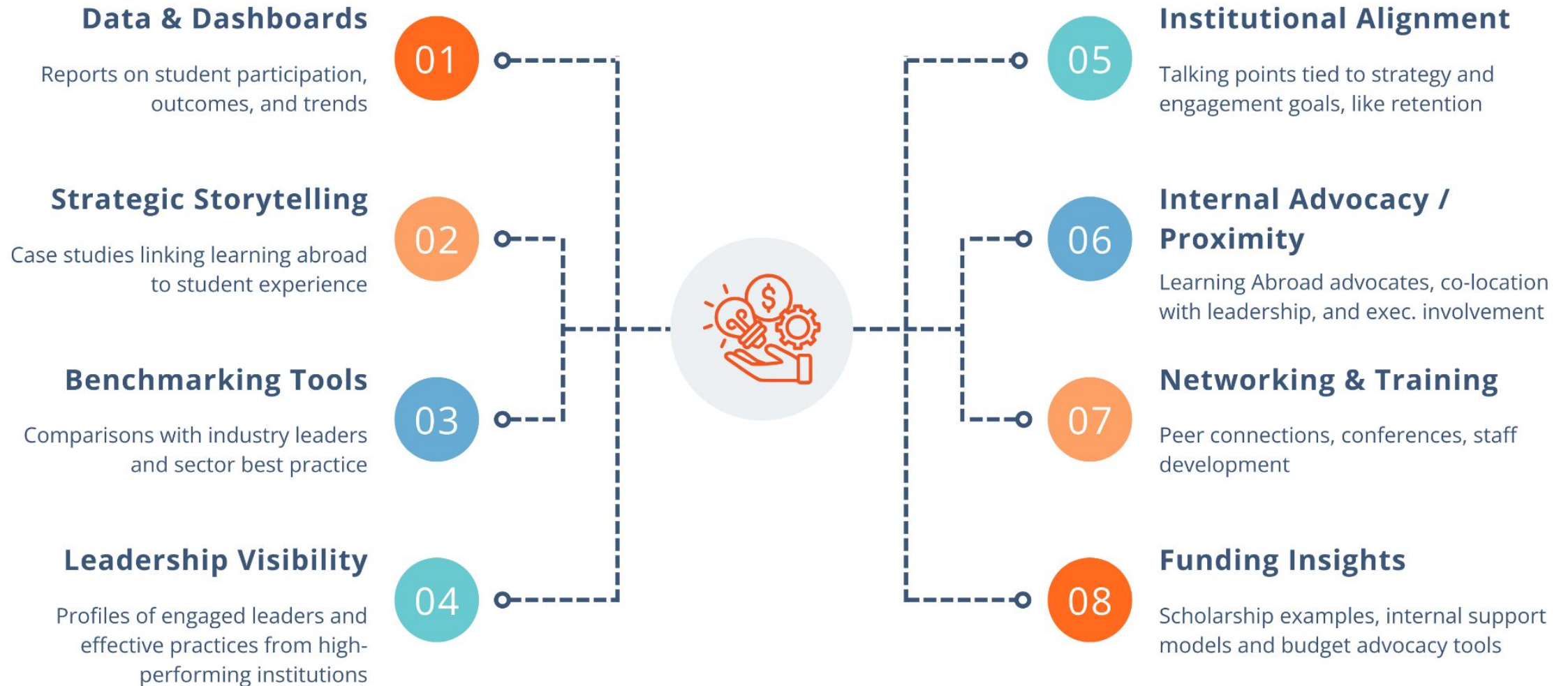


of Responses: 36 | Response Rate: 100%

27. How could your institution's senior management improve its level of engagement and support for Learning Abroad (outbound)?

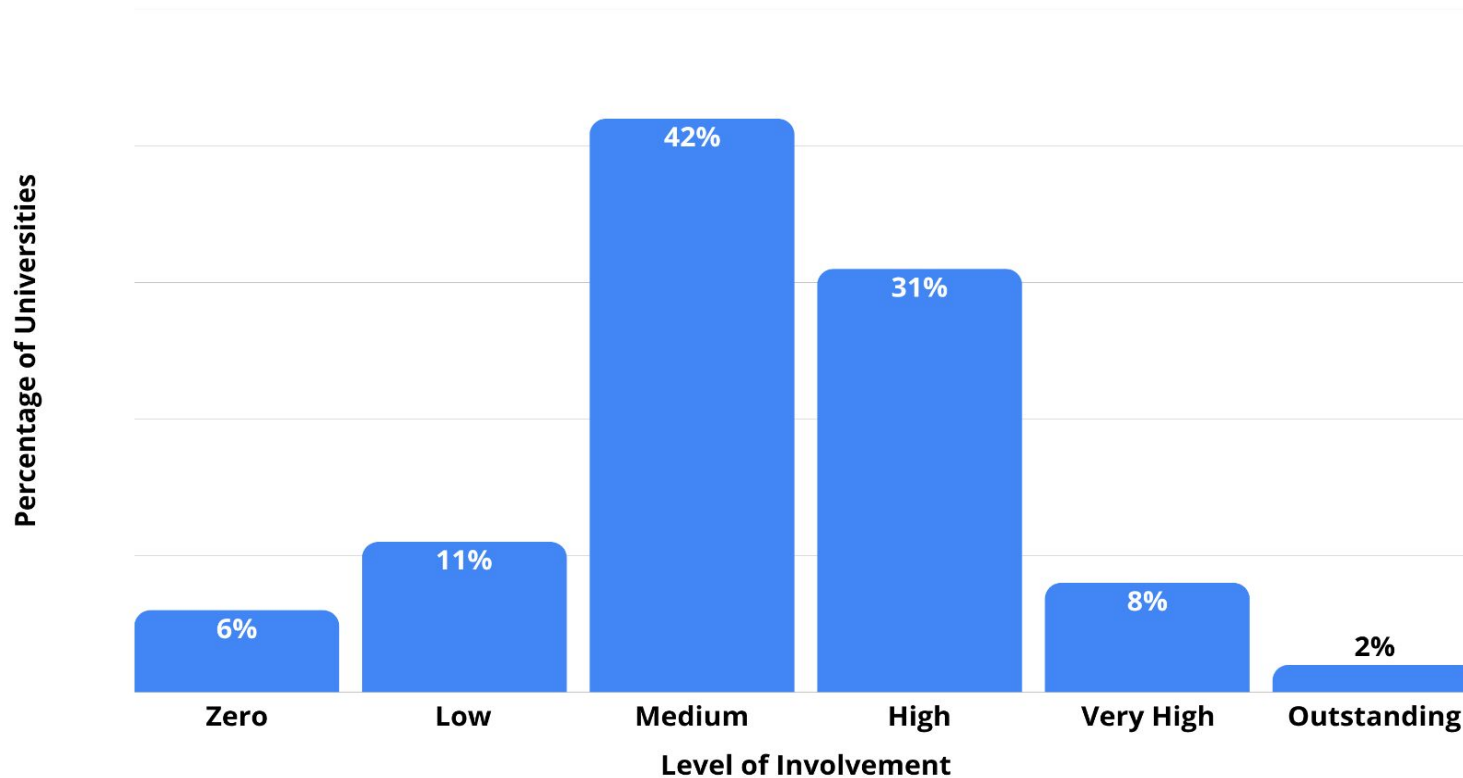
- **Visibility & strategic alignment** – Embed Learning Abroad into strategic plans, KPIs, Vice Chancellor comms; treat as core priority
- **Resourcing & operational support** – Allocate dedicated staff/funding; streamline processes; support during peak periods
- **Academic engagement & incentives** – Recognise 'academic champions' of mobility; integrate mobility into curriculum; enable faculty-led programs
- **Cross-unit coordination** – Strengthen collaboration across Global, Faculties, Student Services, Finance
- **Leadership capacity** – Appoint leaders with international education experience to improve effectiveness
- **Scalable models & innovation** – Explore models like internationalised double degrees; reinvest funding into mobility scholarships

Q28. What tools or resources would help you better communicate with, influence, or gain support from senior management for Learning Abroad (outbound) initiatives?



of Responses: 20 | Response Rate: 56%

Q29 & 30. What level of involvement and support do you believe IEAA provides to your institution in relation to Learning Abroad (outbound)?



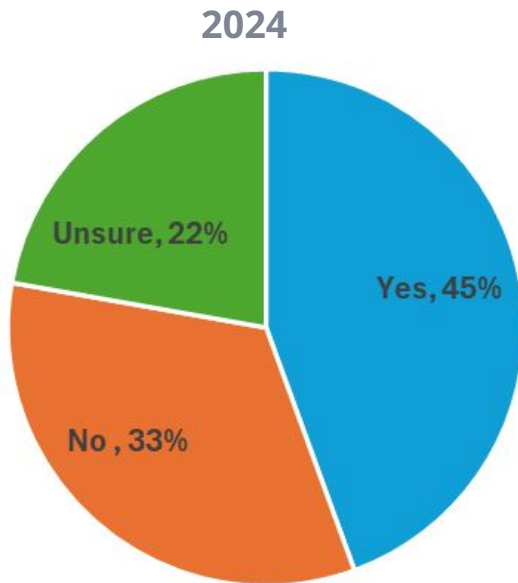
of Responses: 36 | Response Rate: 100%

30. How could IEAA improve its level of engagement and support for Learning Abroad (outbound)?

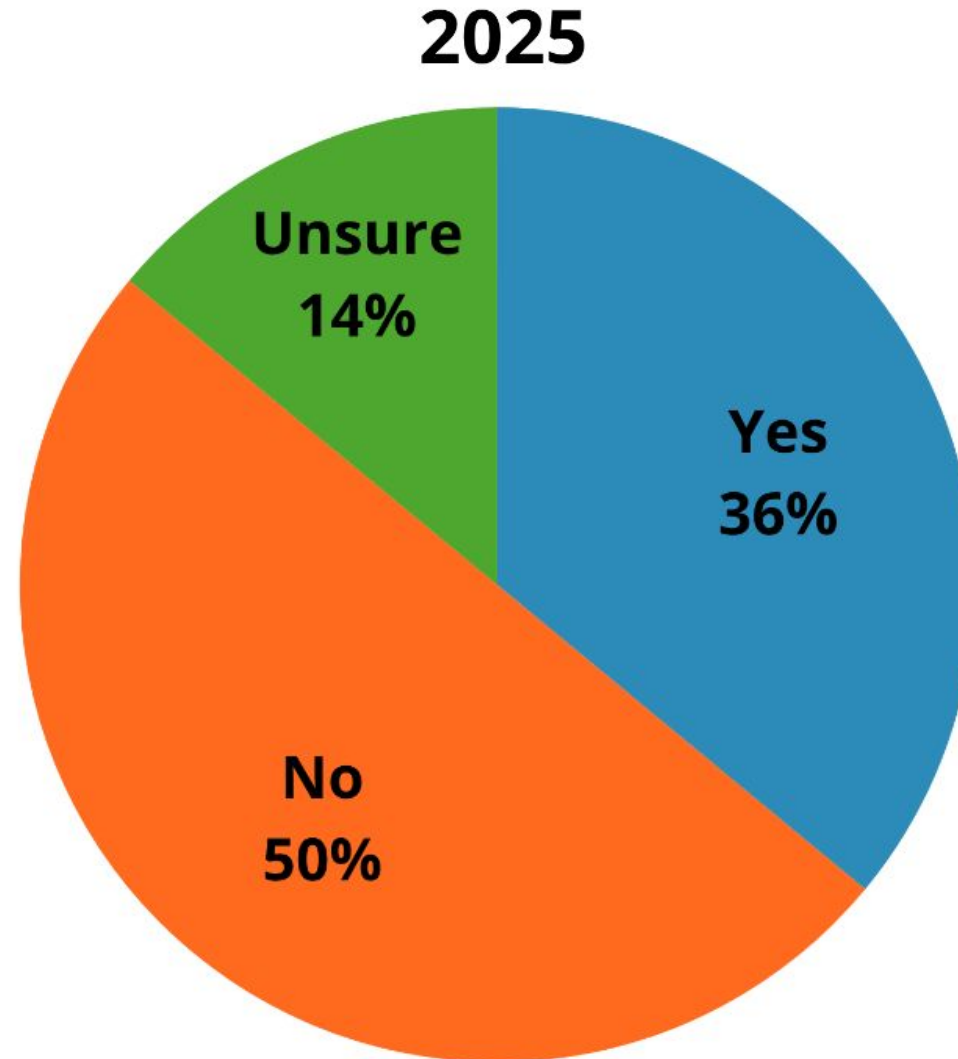
- **Targeted engagement** - Offer region-specific roundtables, workshops, and tailored support (e.g. for regional universities)
- **Advocacy and influence** - Lobby for sustainable, inclusive funding and NCP reform
- **Resource sharing** - Develop toolkits, credit templates, legal/process maps, and practical implementation guides
- **Community of practice** - Expand peer-to-peer sharing, mentorships, and practitioner networks beyond annual forums
- **Professional development** - Offer training for new staff and non-traditional roles
- **Accessible events** - Increase online options to support regional and low-resourced teams
- **Benchmarking and research** - Share data on student motivations, outcomes, and trends to aid internal advocacy
- **Student-facing tools** - Create co-branded materials and campaigns to help promote mobility to prospective students

of Responses: 19 | Response Rate: 53%

Q31. Is Learning Abroad (outbound) clearly articulated and built into your institution's central overarching strategic plan (with clear goals and / or targets) in 2025/26?

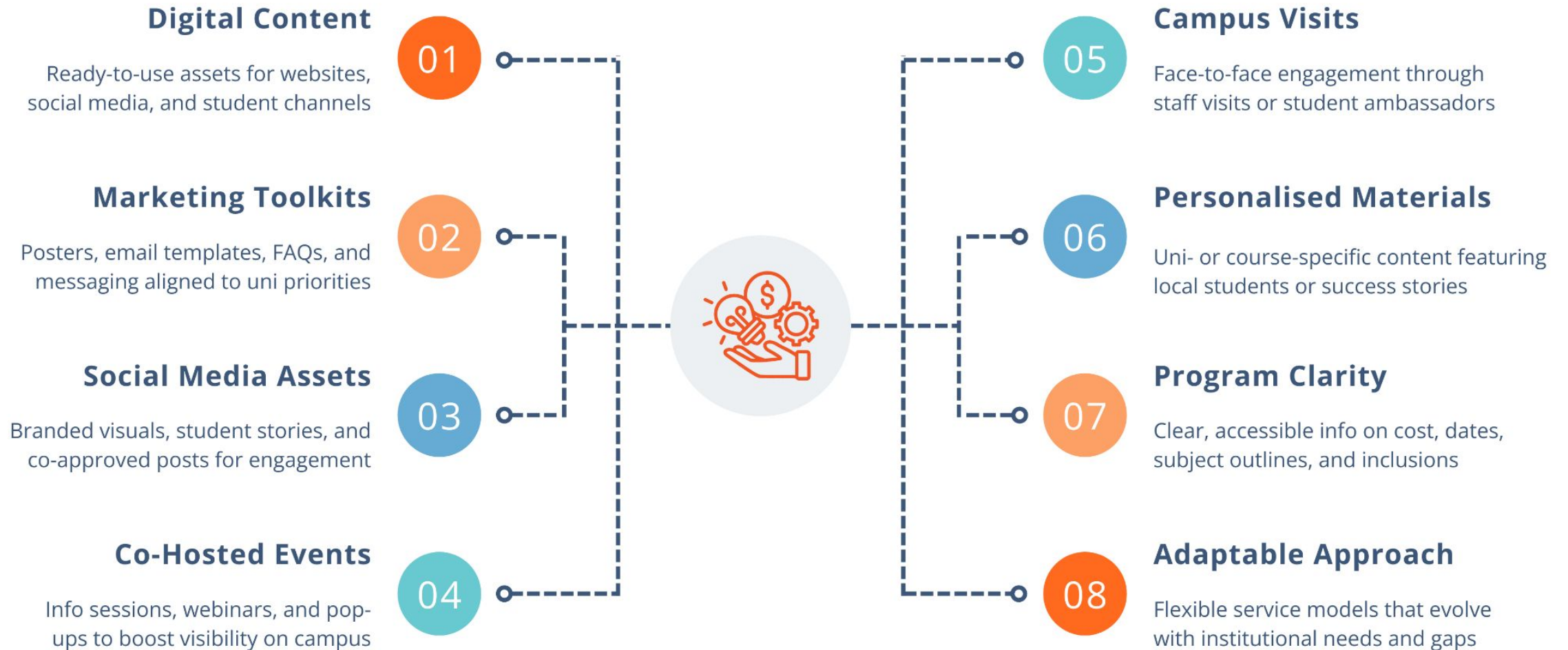


of Responses: 36 | Response Rate: 100%



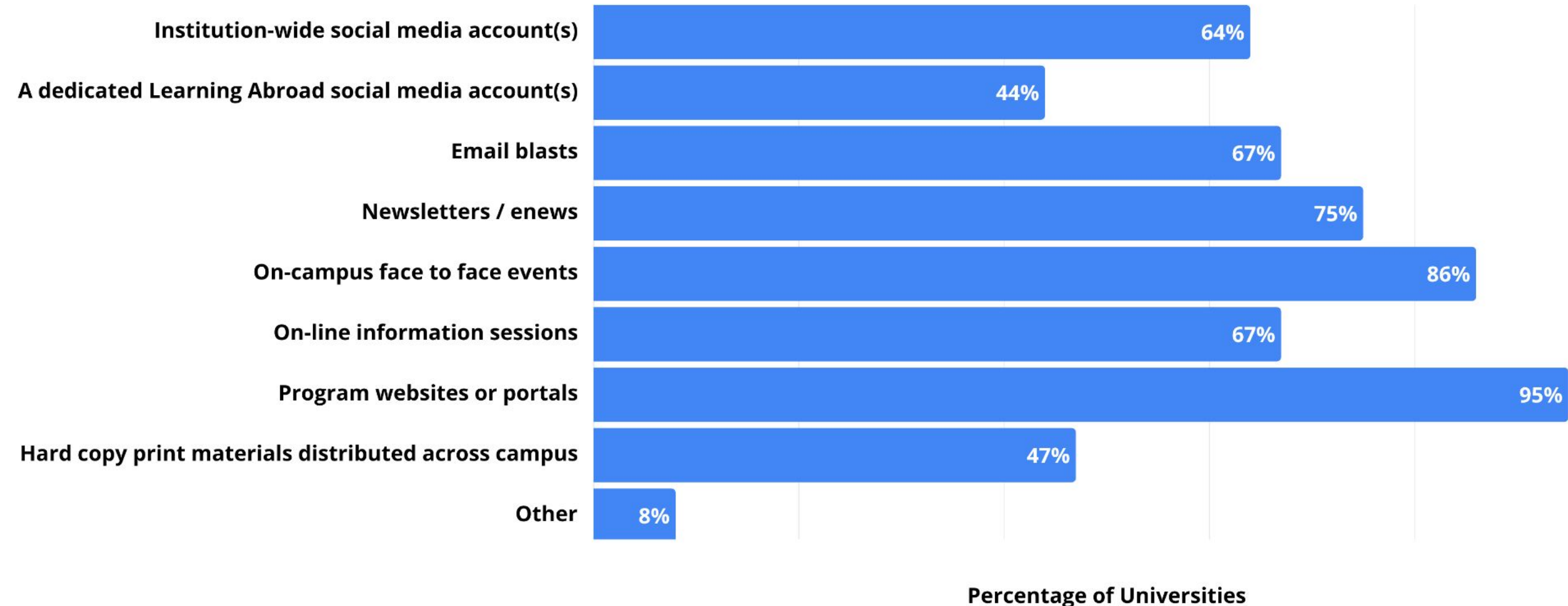
of Responses: 36 | Response Rate: 100%

Q32. What kind of support would be most helpful from Third-Party Providers in promoting Learning Abroad (outbound) to your students?



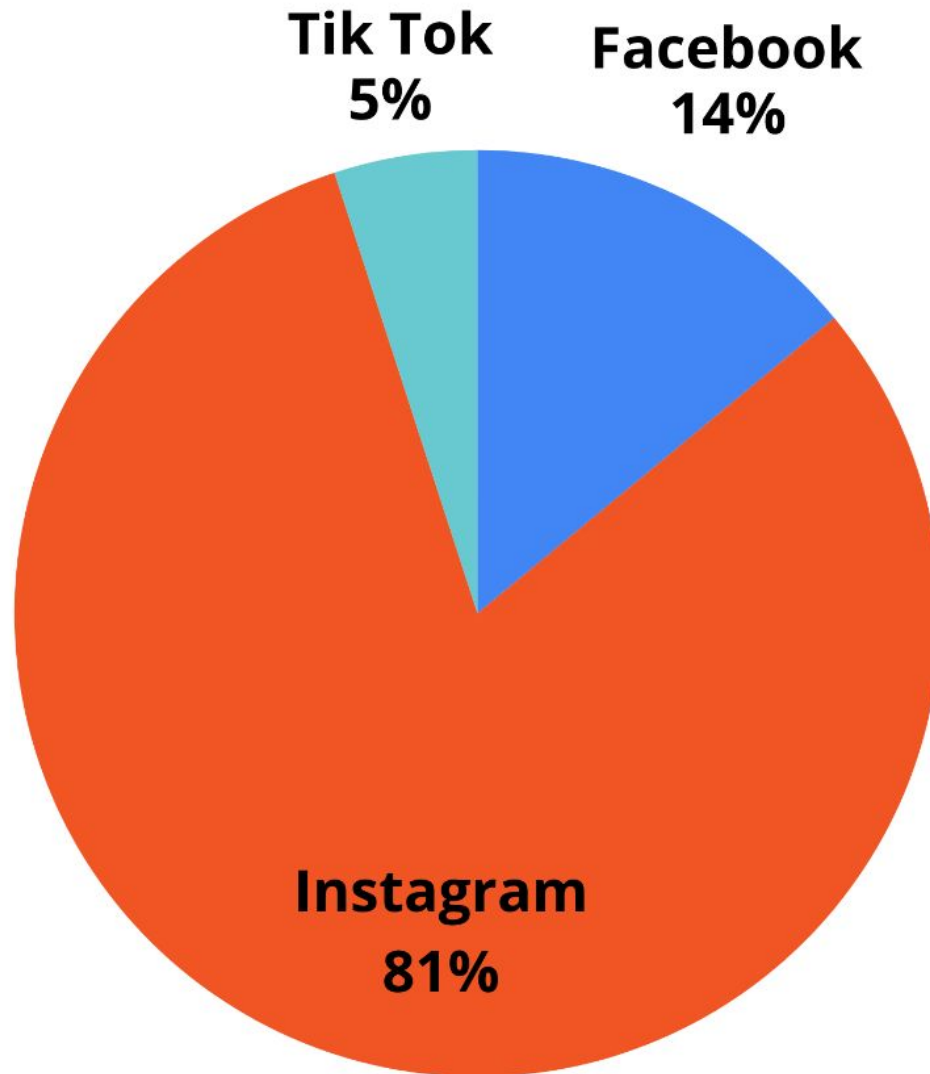
of Responses: 23 | Response Rate: 64%

Q33. How does your institution typically promote Learning Abroad (outbound) opportunities to students?



of Responses: 36 | Response Rate: 100%

Q34. Which social media platform is most effective for engaging your students about Learning Abroad (outbound)?

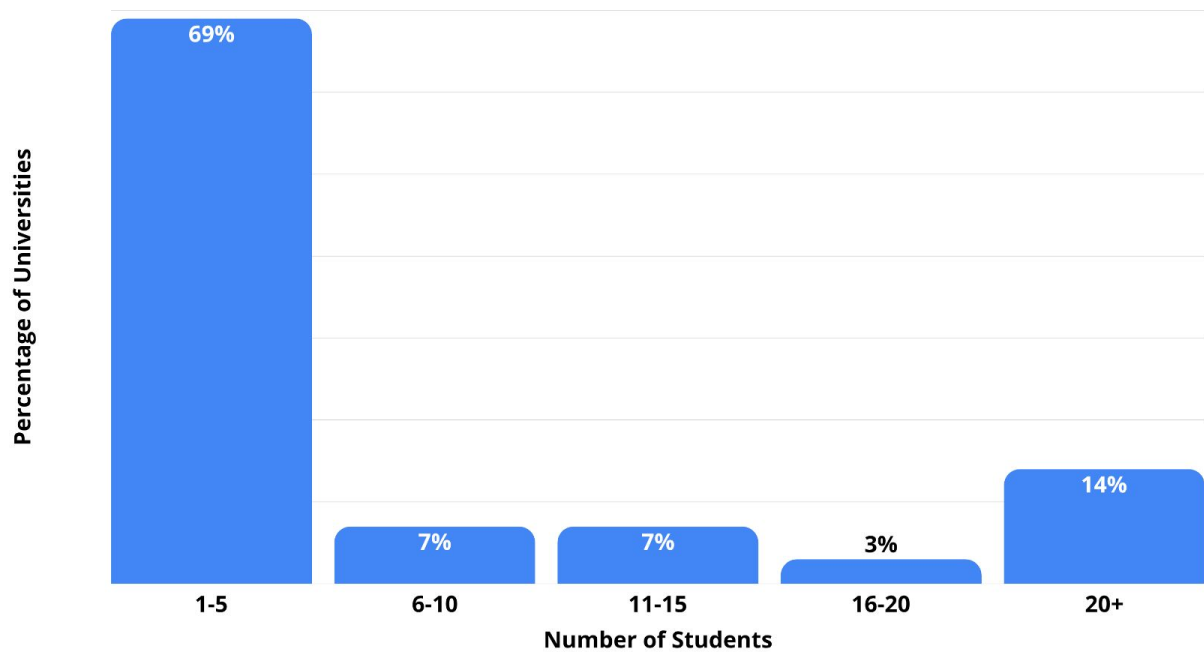


Responses Not Selected:

- LinkedIn (0%)
- Snapchat (0%)
- X (Twitter) (0%)

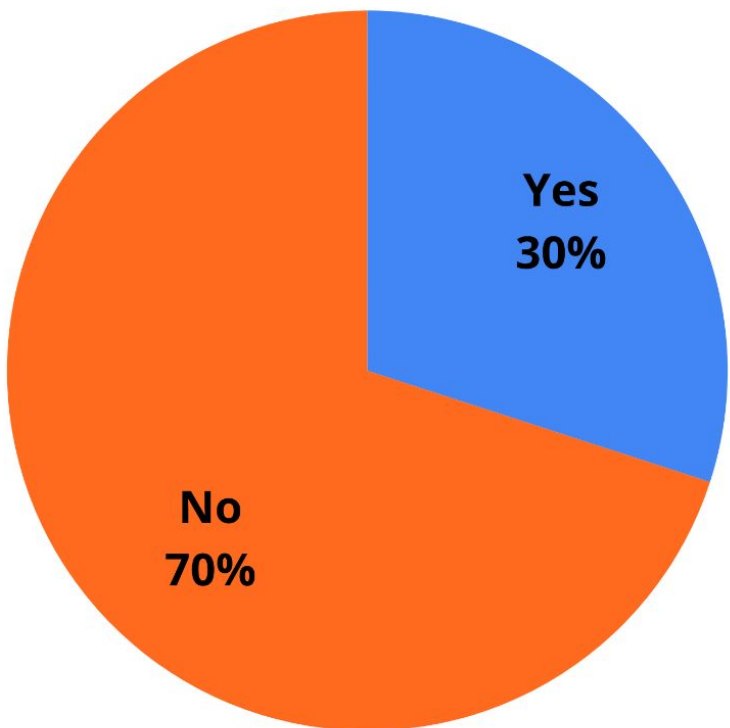
of Responses: 32 | Response Rate: 89%

Q35. How many students from your institution do you expect will participate in a Virtual Learning Abroad program in 2025?



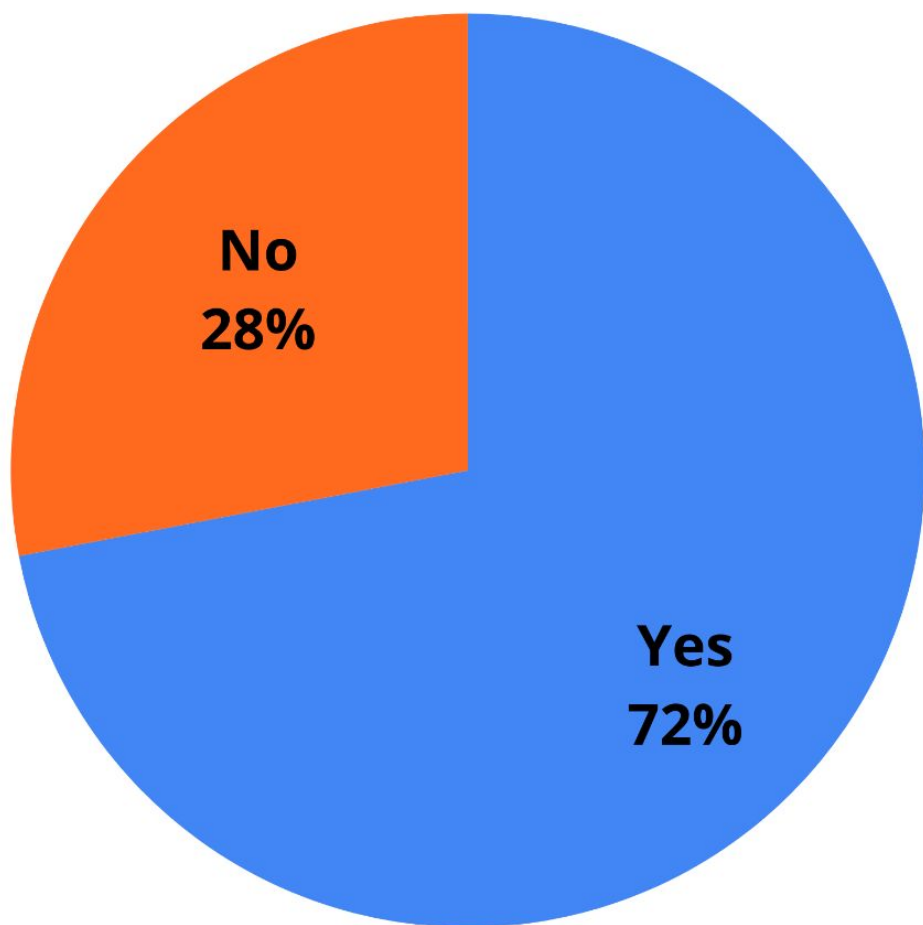
of Responses: 36 | Response Rate: 100%

Q36. Is your institution planning to offer any Virtual Learning Abroad programs in 2026?



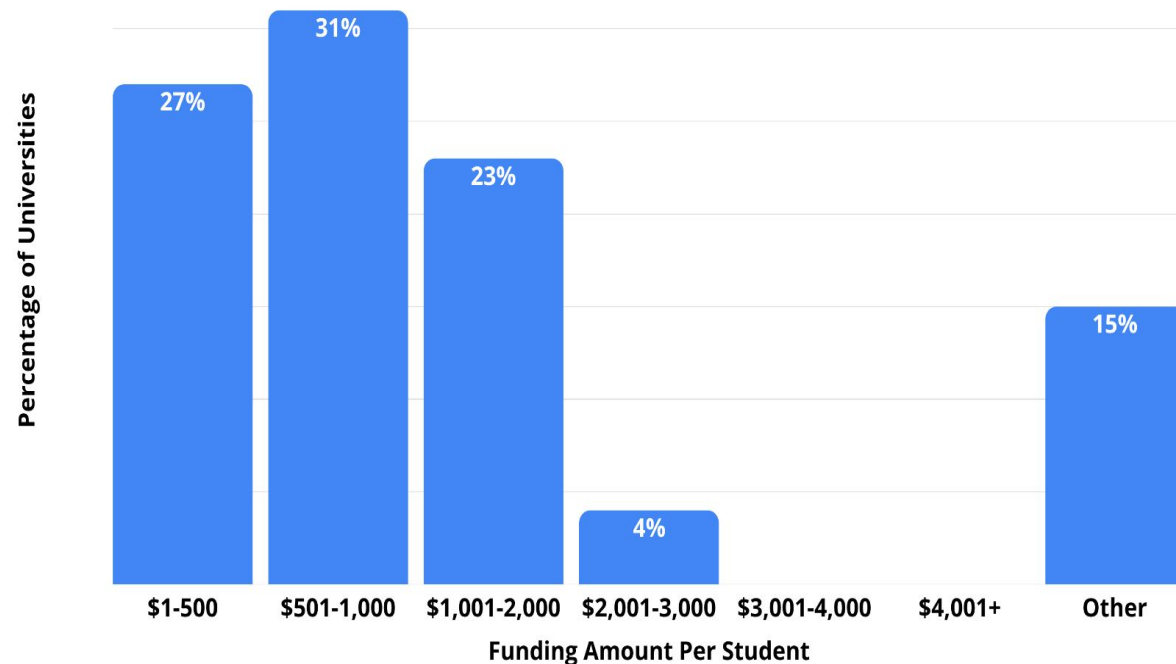
of Responses: 34 | Response Rate: 94%

Q37. Will your institution provide any internal central funding to support students participating in Learning Abroad (outbound) programs in 2025/2026?



of Responses: 36 | Response Rate: 100%

If yes, please indicate funding amount per student for short-term programs less than 12 weeks:



of Responses: 26 | Response Rate: 72%

Comments:

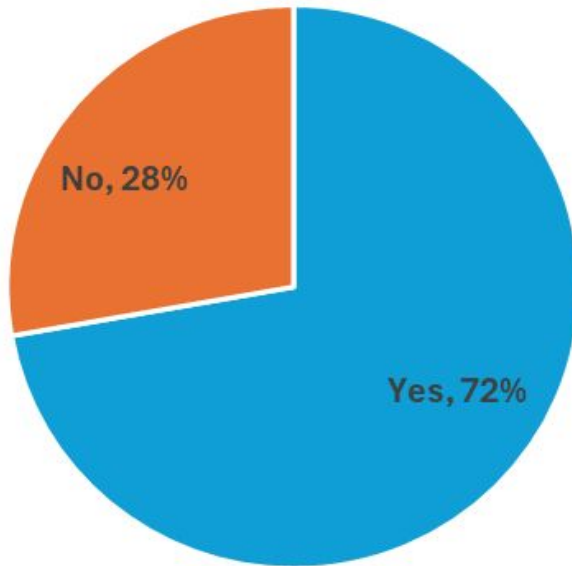
- Funding depends on the actual program including location, duration and how much is left in the budget
- Funds are allocated by student profile and activity
- Short-term: \$500-\$1,000 and Exchange: \$1,200 - \$2,000
- No central budget for short programs

Q37a. Do you have any additional comments regarding your institution's internal funding for Learning Abroad (outbound) programs?



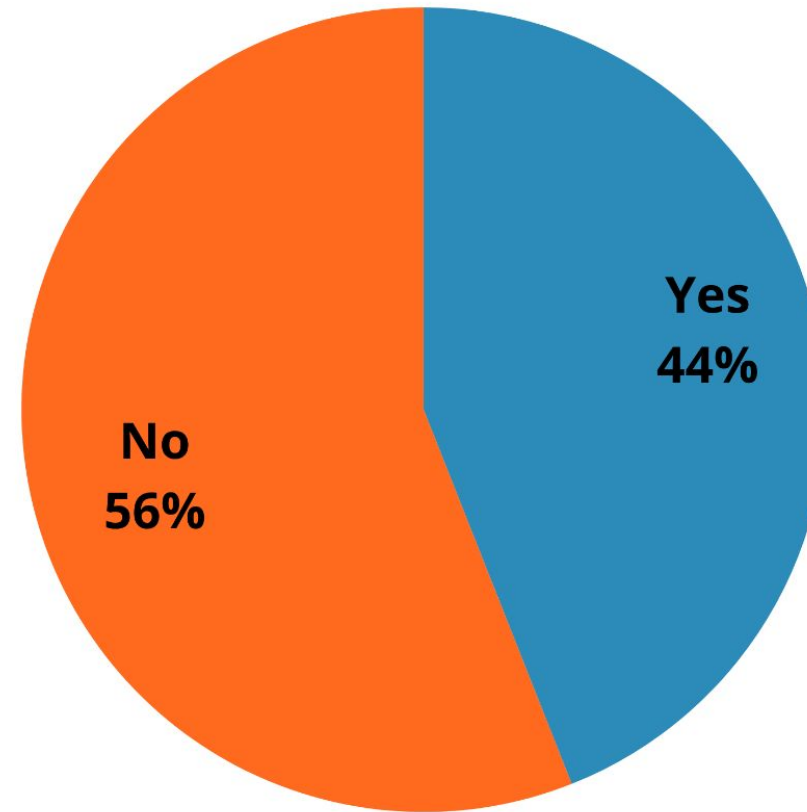
Q38: Do you anticipate increased interest and engagement regarding Learning Abroad from your university's academic staff in 2025 compared to 2024?

2024 responses



of Responses: 36 | Response Rate: 100%

2025 Responses



of Responses: 36 | Response Rate: 100%

Q39. What do you see as the *main barrier* for academic staff to lead Learning Abroad (outbound) programs, specifically customised study tours, in 2025/26?

01

Workload Pressure

Teaching and research loads leave little room for other initiatives



02

Reduced Resourcing

Staff cuts, budget constraints, and limited admin support



03

NCP Changes

4-week minimum has reduced interest and program viability



04

Low Morale and Uncertainty

Restructures and funding shifts impact motivation



05

Curriculum Fit

Unclear links to credit, assessment, or course structures



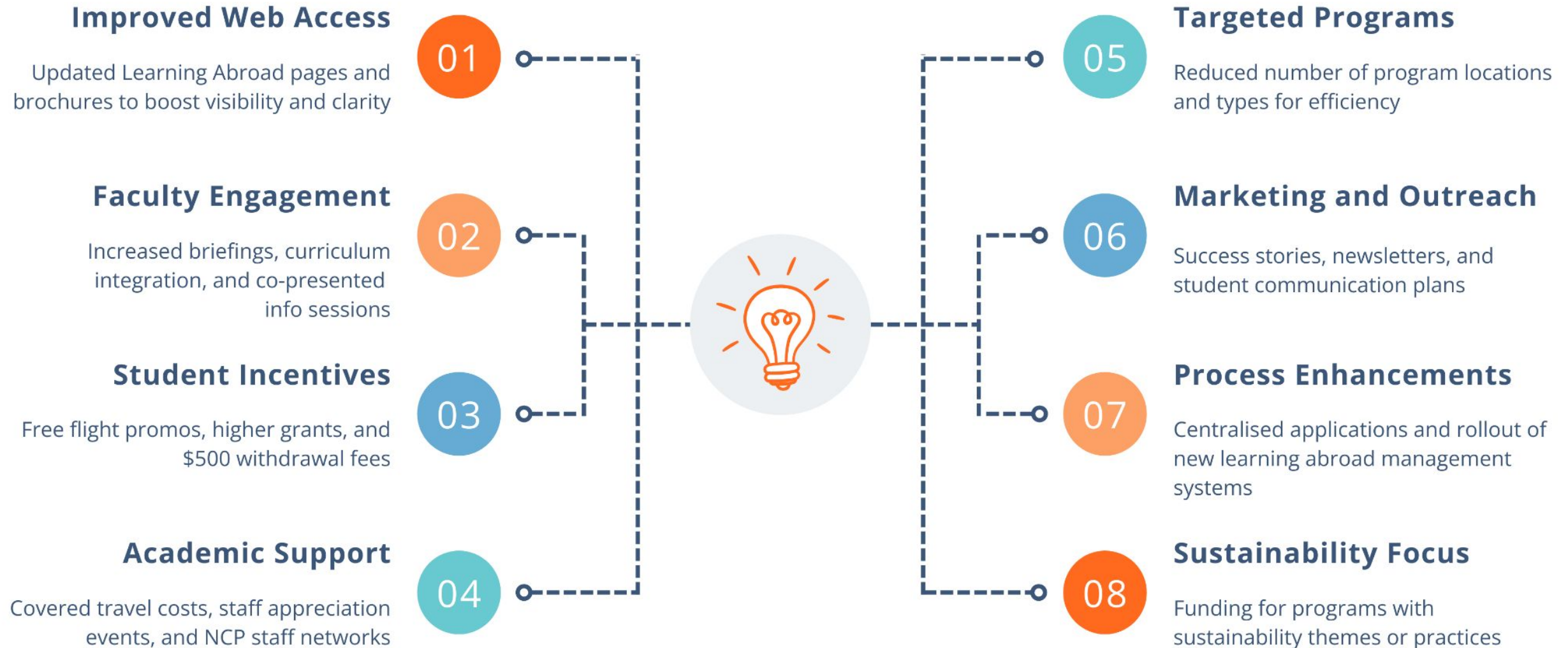
06

Limited Incentives

Lack of financial support or formal workload recognition



Q40. What successful new initiatives has your institution implemented in 2024/2025 to support students and academic staff in participating in or leading Learning Abroad (outbound) programs?



of Responses: 24 | Response Rate: 67%

Planning Ahead with CISAustralia: What Partners Need in 2026

(Summary of Q41, Q41a and Q42)



Programming: What Institutions Would Like in 2026?

- **Inclusive programs** - Targeted options for regional, low-SES, and underrepresented students
- **Discipline expansion** - More offerings in Health, Engineering, IT, Agriculture, and Allied Health
- **Skill development** - Programs that build leadership, global citizenship, and intercultural competence
- **Flexible delivery** - Affordable, non-faculty-led, or virtual programs with micro-credentials
- **Stronger engagement** - Regular updates, clearer info on offerings, and shared student success stories



Countries: What Institutions Would Like in 2026?

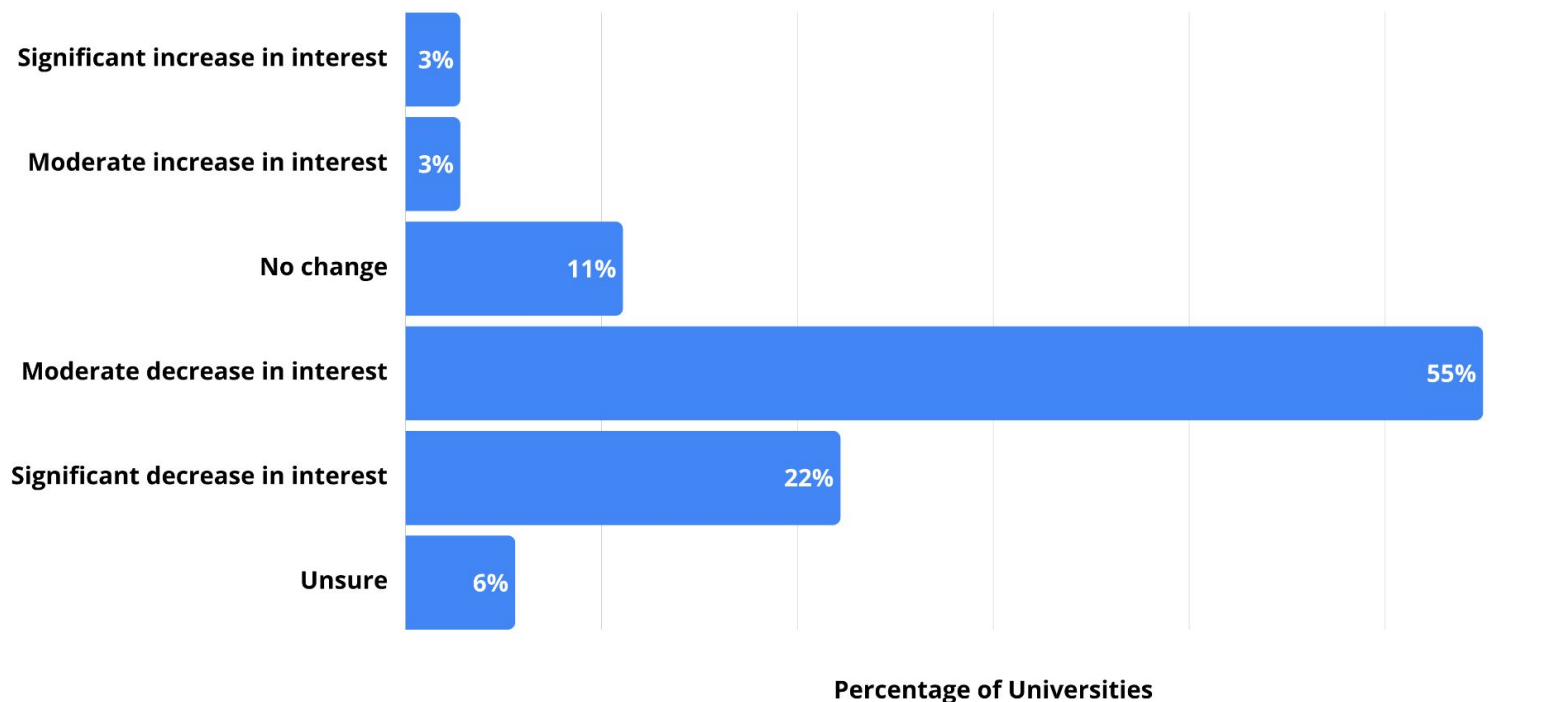
- Vietnam
- Malaysia
- Sri Lanka
- Brazil
- Greece
- Middle East (with focus on Arabic Studies)
- South Korea
- NCP Asian countries
- More diversity across Asia-Pacific and Africa



What Institutions Value About CISAustralia?

- **Clear communication** - Timely updates and consistent engagement with staff and students
- **Supportive team** - Approachable, responsive staff and strong relationship management
- **Customised programs** - Flexible delivery of tailored study tours and short-term options
- **Student support** - Strong pre-departure, on-ground, and risk management support
- **Sector advocacy** - Visible presence and valued voice within the sector

Q43 and Q43a. In 2025, do you anticipate any change in the level of interest from your students in undertaking Learning Abroad programs in the United States?

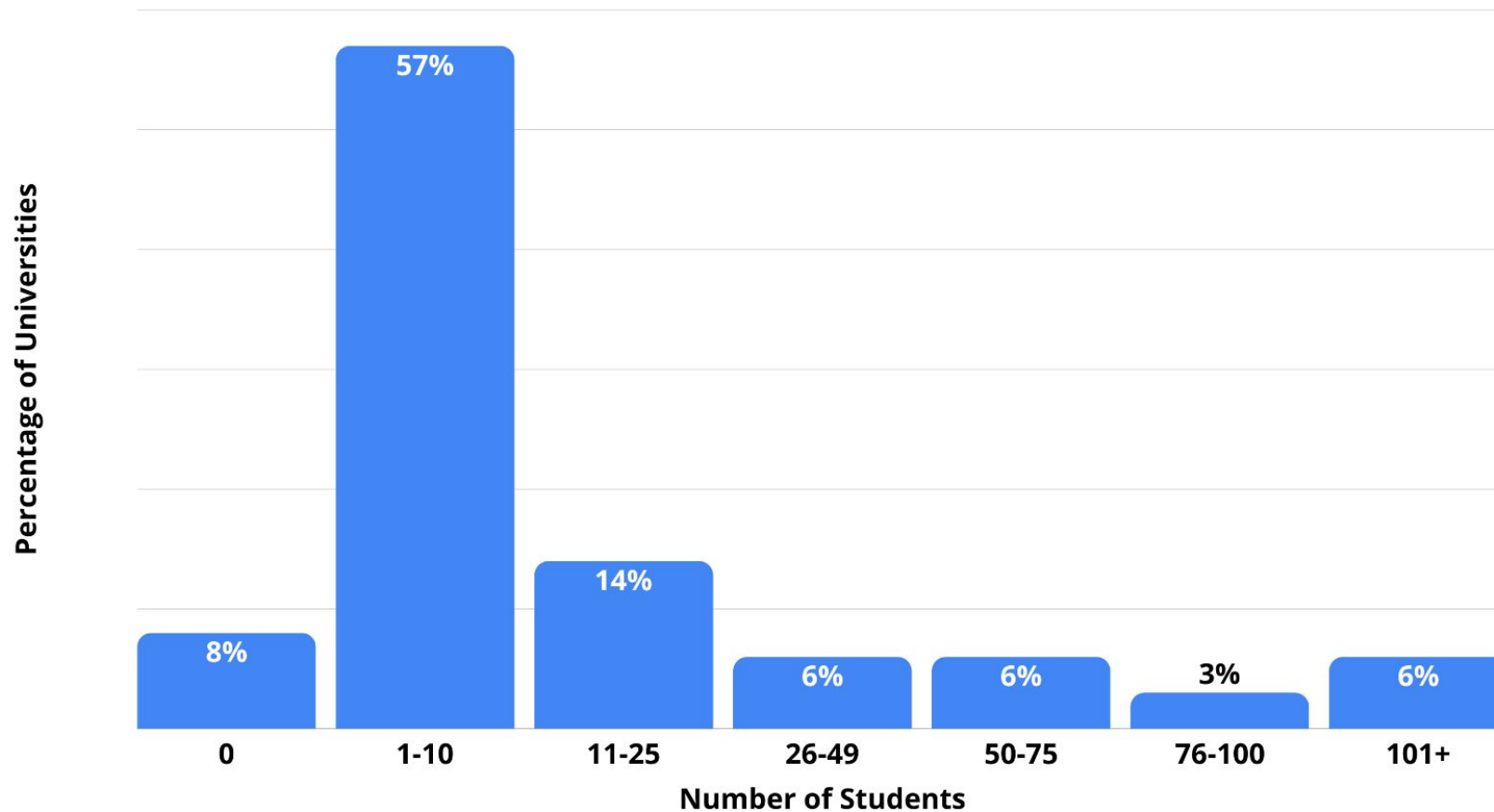


of Responses: 36 | Response Rate: 100%

43a. What are the key factors influencing this change in student interest?

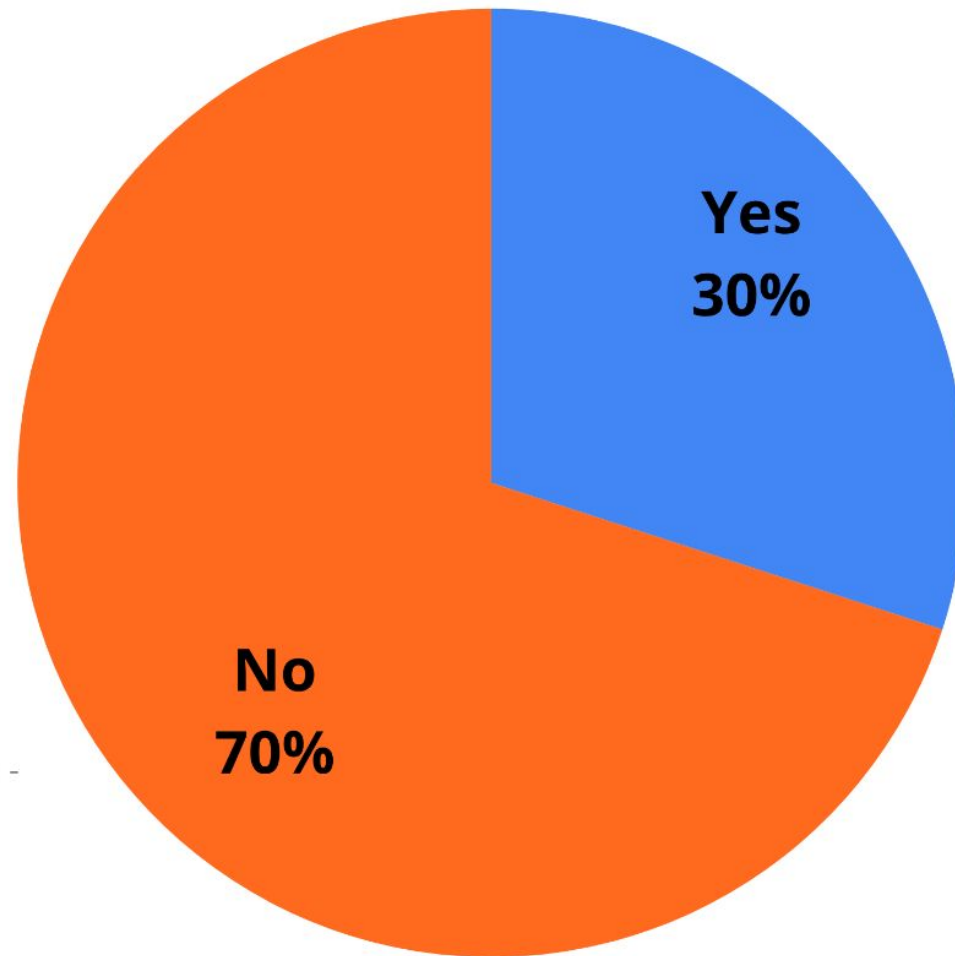
- **Political uncertainty** - Concerns about the current US administration and shifting policies
- **Visa challenges** - Difficulty obtaining visas, vetting processes, and appointment delays
- **Safety concerns** - Perceptions of instability, border issues, and personal safety risks
- **Negative media coverage** - News reports and social media fuelling uncertainty and fear
- **Geopolitical tensions** - Broader world events and distrust in government impacting decisions

Q43b. How many students from your institution do you expect to place in the USA on Learning Abroad programs in 2026?



of Responses: 36 | Response Rate: 100%

Q44. Has your institution encountered any administrative or logistical challenges when sending students to the United States on short-term or semester-length Learning Abroad programs in 2024/2025?

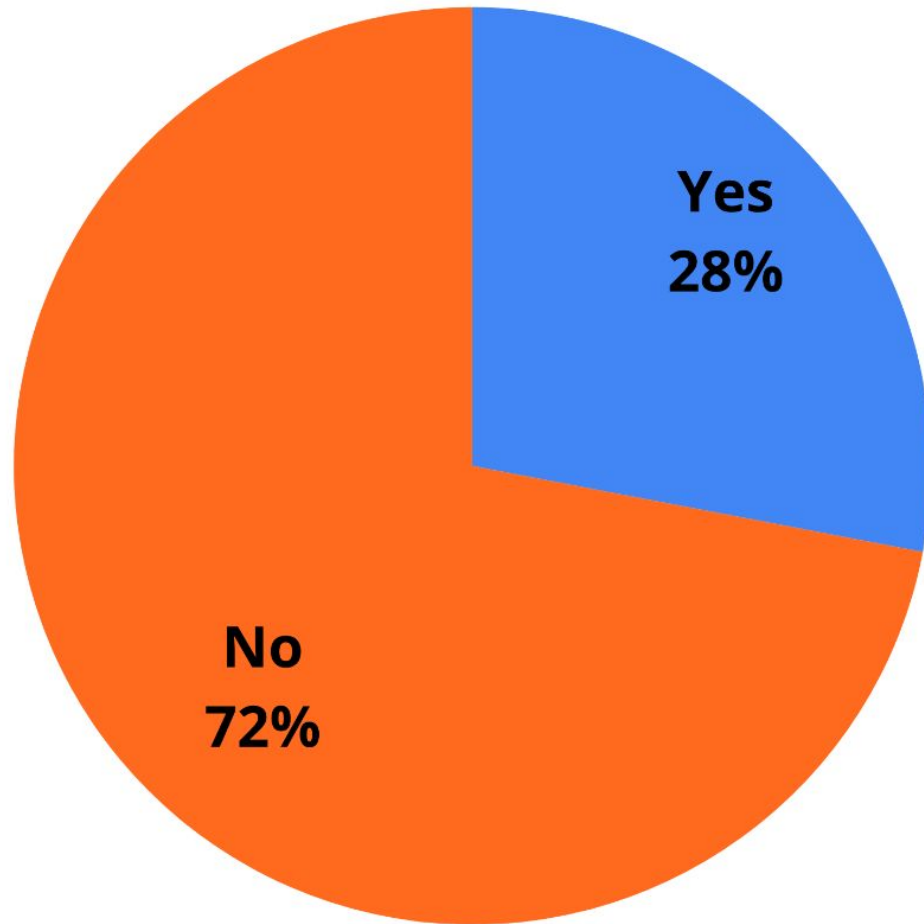


of Responses: 27 | Response Rate: 75%

If yes, please briefly describe the nature of these challenges:

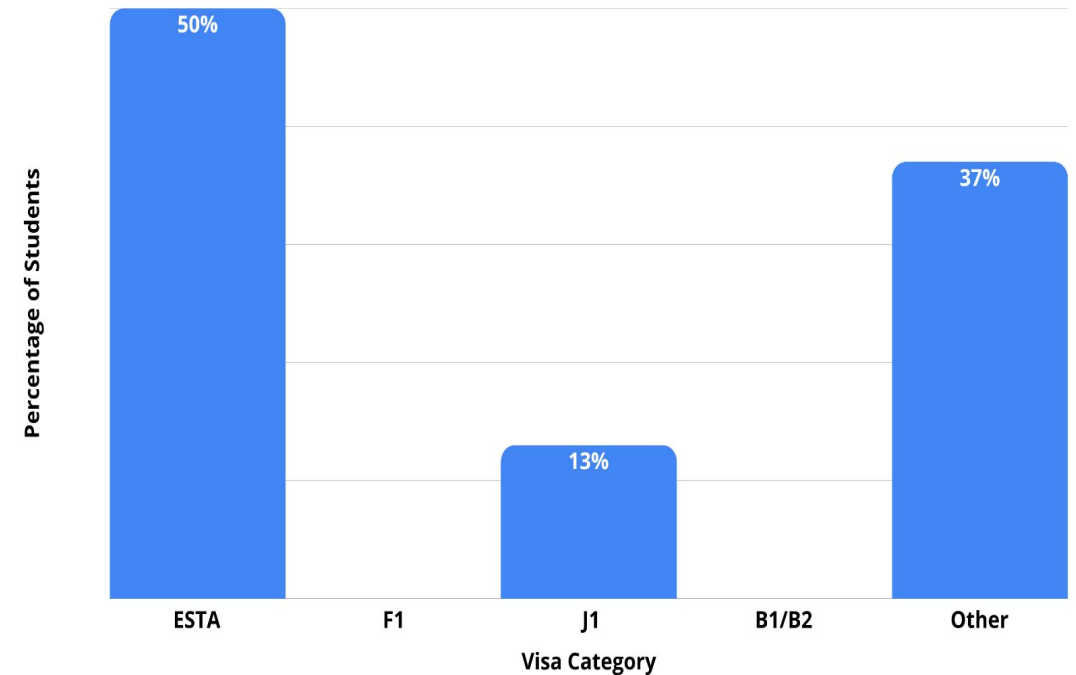
- **Visa delays** - Long waits or lack of available appointments
- **Paused interviews** - Temporary suspension of student visa interviews (esp. J-1) disrupted planning
- **Last-minute uncertainty** - Timing of visa issues made it difficult to redirect students
- **Partner hesitation** - Some US partners held off on placements due to unclear visa status
- **Student impact** - Some students faced redirection, deferral, or were denied visas altogether
- **Safety and political concerns** - Perceptions of instability and distrust in US policies added hesitation
- **Increased enquiries** - Students asked more questions about US entry, visa tips, and alternatives
- **University caution** - Some VCs or staff advised students to consider destinations other than the US

Q45. Has your institution placed students in the USA on an institutional academic lead study tour in 2025?



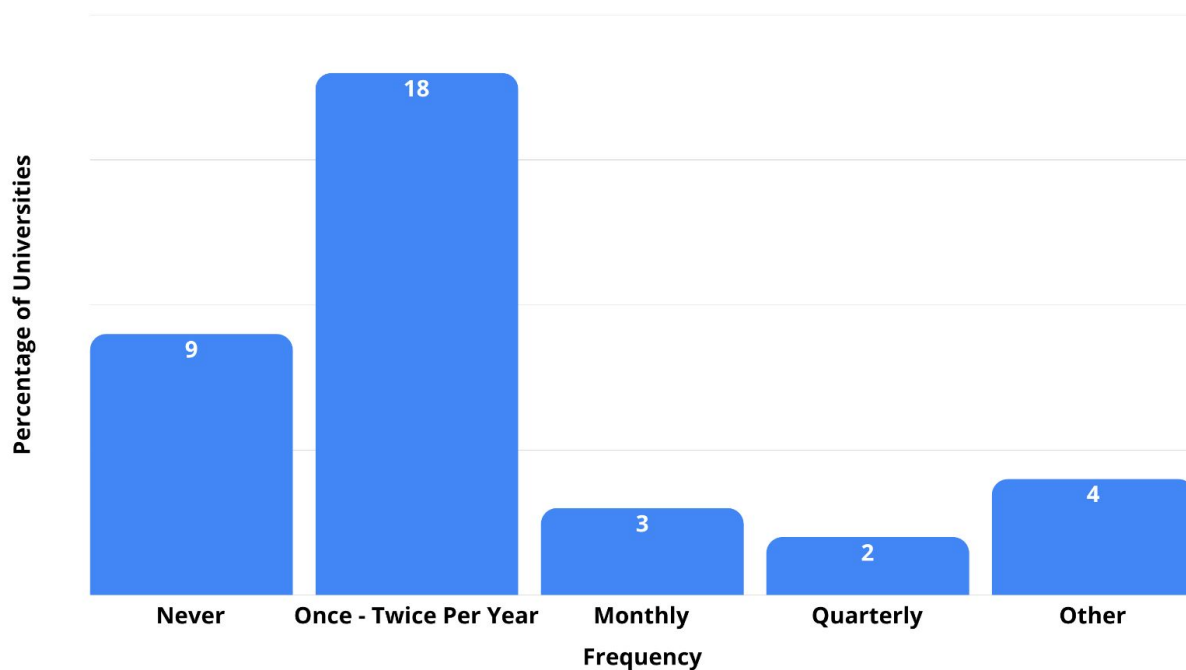
of Responses: 36 | Response Rate: 100%

If yes, what visa category did they enter the USA on?



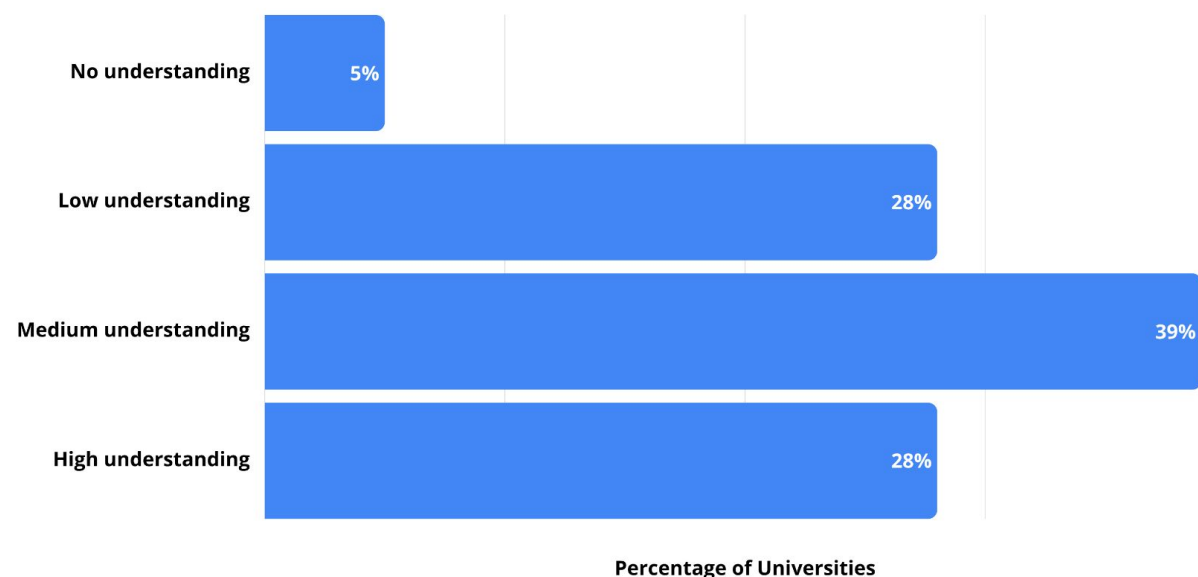
of Responses: 8 | Response Rate: 80%

Q46. How often do you and / or your institution's Learning Abroad Office (outbound) meet with and engage with your institution's Domestic Recruitment Office / Department?



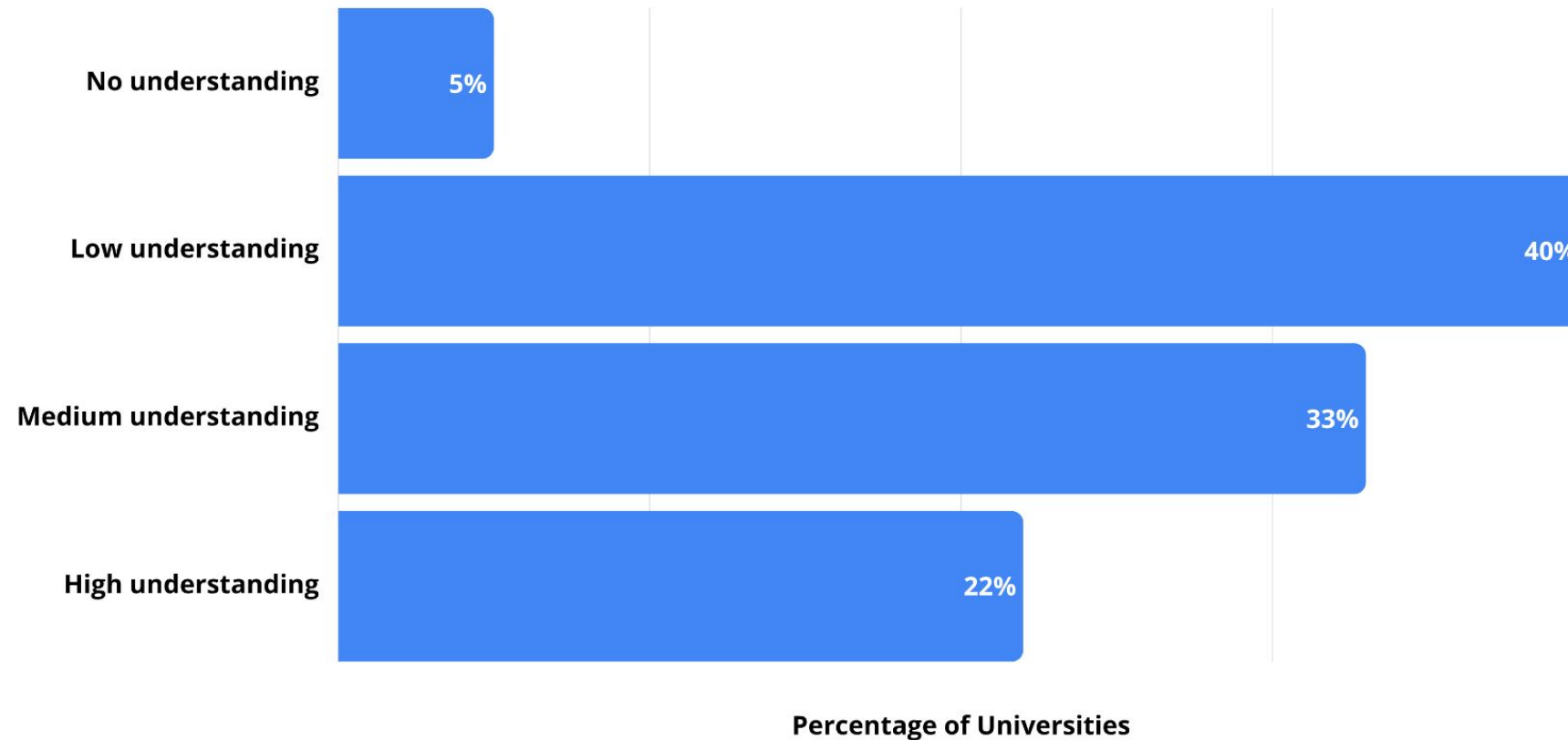
of Responses: 36 | Response Rate: 100%

46a. Does your institution understand the value of Learning Abroad (outbound) when used as a Domestic Recruitment tool to attract Australian high school students to your institution?



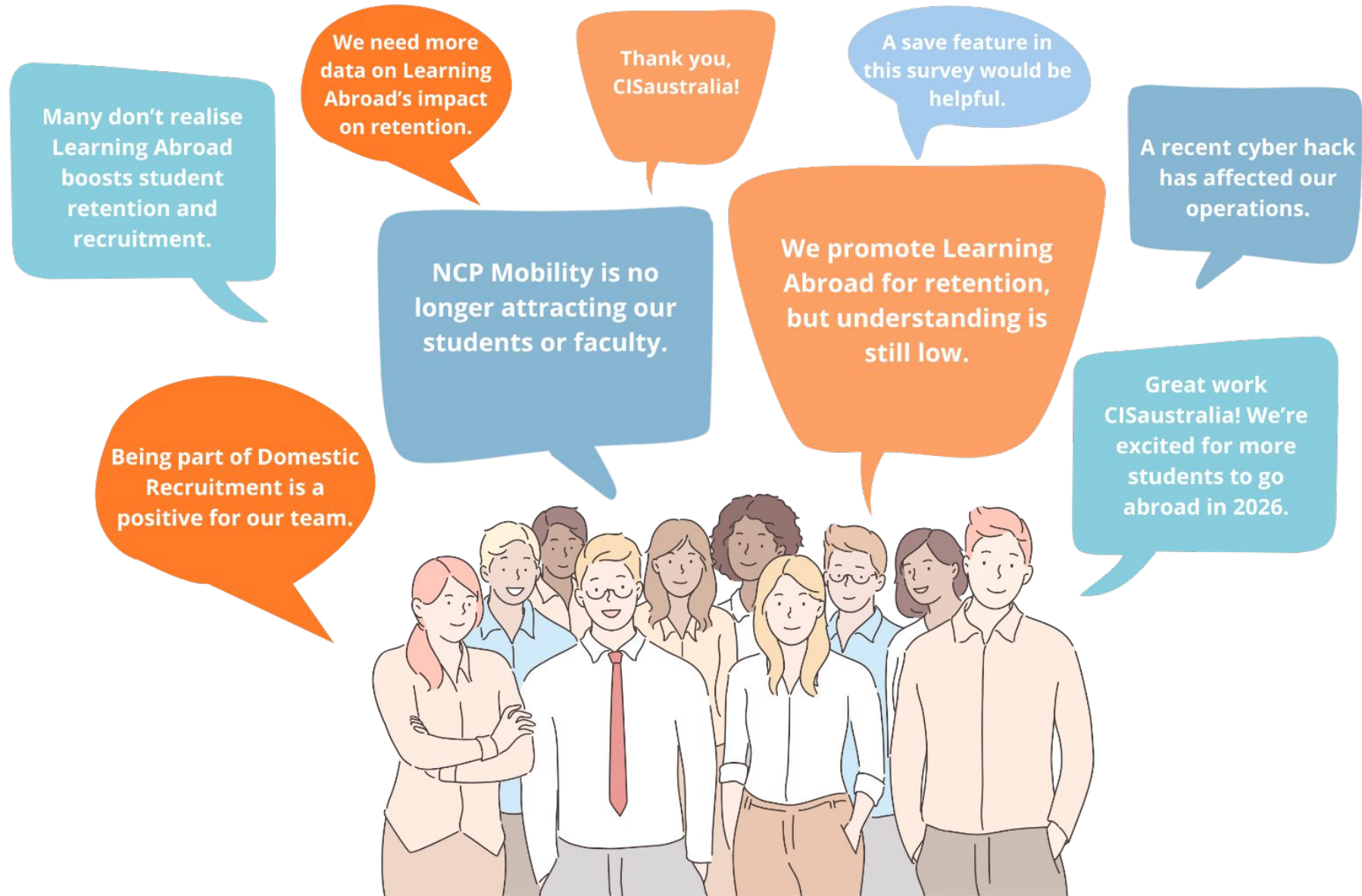
of Responses: 36 | Response Rate: 100%

Q47. Does your institution understand the positive impact that Learning Abroad (outbound) has on student retention at your institution (after a student has returned from their program abroad, as compared to students that never attend a Learning Abroad program)?



of Responses: 36 | Response Rate: 100%

Q48. Additional comments / feedback / ideas / thoughts welcome:





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