Mapping English-taught Programmes Worldwide

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1. Introduction

Internationalisation in higher education is crucial for creating a globally connected and informed academic environment. It encompasses various activities including student and faculty exchange programmes, international research collaborations, and the integration of international content into the curriculum.

According to data from UNESCO, the number of international students increased from under two million in 1998 to over 6.4 million by 2020.[1] This growth, averaging 5.4% annually, was interrupted only by the COVID-19 pandemic. However, 2022 saw a significant rebound, with the OECD's report on international migration noting a 24% increase in international students within OECD countries in 2022 compared to 2019.[2]

While the United Kingdom, the United States, Australia, and Canada — collectively known as 'the Big Four' — continue to lead in offering English-taught programmes (ETPs), countries in Europe, Asia, and Africa are emerging as viable alternatives.

Building on our previous report from 2021, 'The Changing Landscape of English-Taught Programmes',[3] which examined the recovery post-COVID, this report identifies key trends in using English language as an educational medium. In particular, the report focuses on the supply of on-campus, English-taught full degree programmes at the Bachelor's and Master's level across non-anglophone countries. The primary data source consists of Studyportals' database, comprising more than 240,000 ETPs worldwide, encompassing over 3,500 higher education institutions (HEIs).

Furthermore, the report confirms earlier forecasts of growth in postgraduate programmes outside the Big Four, and adopts a holistic approach to analysing the development and trends of on-campus programmes across study destinations, regions, subject areas, study methods, formats, institutional rankings, and English language requirements.

As geopolitical shifts and domestic policies negatively impact traditional markets for ETPs, accurate data and business intelligence become vital. It enables higher education institutions to navigate rising challenges effectively, remain competitive, and meet international students' needs.

[1] UNESCO. "UNESCO Institute for Statistics Data Centre". Retrieved 23 May 2024 from https://data.uis.unesco.org/
[2] OECD (2023) "International Migration Outlook". Retrieved 23 May 2024 from https://www.oecd-ilibrary.org/sites/b0f40584-en/index.html?itemId=/content/publication/b0f40584-en
[3] Neghina, C. & Agnew, M. (2021) "The changing landscape of English-taught programmes". *British Council IELTS* and *Studyportals*. Retrieved 15 May 2024 from https://studyportals.com/wp-content/uploads/2021/12/British-Council_Studyportals_The-changing-landscape-of-English-taught-programmes-in-2021.pdf

2. The prevalence of English in international education

2.1. The global reach of English

The English language is currently spoken by 1.35 billion individuals,[4] representing 17% of the global population, with various nationalities, such as those in the United Arab Emirates and Malaysia, exhibiting a growing desire to learn the language.

This is further evident by the rising number of students travelling abroad to learn English in the UK, the USA, Ireland, Canada, and Australia but also in locations such as Malta, South Africa, Singapore, the Philippines, and Malaysia.[5] There are also an estimated 142 countries which have adopted the English language as core element of national policies that concern the education sector.[6]

Furthermore, English remains a concrete tool that enables higher education institutions (HEIs) to adopt an international education strategy that makes them more attractive to the millions of internationally mobile students. The broader community beyond the educational sector, such as with policy makers and labour market employers, is also focused on internationalisation due to the need to align with socio-cultural and economic interests, shifts in migration trends, and post-study work rights.[7]

As noted by the British Council in their *Future of English* report,[8] "English as a medium of education can enhance learners' grasp of English and their ability to employ it across a variety of subjects and contexts." Doing so increases the access to millions of students globally to benefit from academic, research, and employment opportunities that prioritise the use of English as a skill. As such, the British Council has also recommended for a stronger bond between public- and private-sector English language providers to further strengthen the support for English as medium and English as a power multiplier for various stakeholders.

2.2. ETPs globally

Thus, the multifaceted ways that English can be perceived indicates that it remains relevant and important for the continued expansion of international education. Studyportals data is exemplary, identifying close to 41,000 on-campus ETPs offered by countries outside of the Big Four destinations in March 2024.

In 2024
Studyportals identified

40,786

English-taught programmes

Outside the Big Four
anglophone destinations

Although this represents 22.3% of total global supply, such a number show that international students have more flexibility to decide where to study abroad according to their needs. The latter is an important point to consider as students are no longer looking at options in a single

[4] EC English (2024) "70 Statistics About the English Language". Retrieved on 23 Mary 2024 from https://www.ecenglish.com/en/school-locations/blog/ec/2024/04/24/70-statistics-about-the-english-language/.
[5] *Ibid.*; see also Statista (2023) "Number of students learning English as a foreign language in 2022 by country". Retrieved on 23 May 2024 from https://www.statista.com/statistics/474379/english-language-students-per-country/; see also ICEF Monitor (2024) "Global ELT market estimated to have recovered to 90% of 2019 levels in 2023". Retrieved on 23 Mary 2024 from https://monitor.icef.com/2024/01/global-elt-market-estimated-to-have-recovered-to-90-of-2019-levels-in-2023/.
[6] *Ibid.*
[7] Tran, L.T. *et al.* (2023) "New developments in internationalisation of higher education". *Higher Education Research & Development*, 42:5, 1033-1041. Retrieved on 23 May 2024 from https://doi.org/10.1080/07294360.2023.2216062
[8] Patel, M. *et al.* (2024) "The Future of English: Global Perspectives". *British Council*. Retrieved on 23 May 2024 from https://www.britishcouncil.org/future-of-english.

country or city, but assess their options across numerous destinations, cities, and even institutions.[9]

A report commissioned by the British Council using Oxford Economics data further emphasises the global outlook and sustainability of international student mobility across inbound and outbound student markets.[10] Using various demographic, economic, and international student mobility indicators, Oxford Economics developed an index to assess the growth potential of different source markets for student recruitment and to identify any markets that pose a risk to student recruitment.

For instance, China and India are identified as "high volume, high potential" markets in the global outbound student market until 2030, due to their large and growing middle- and high-income households. On the other hand, countries like Brazil, Ghana, Mexico, Nigeria, and Türkiye belong to the "growth limitations, high macro risk" group, given the challenges these markets face from a demographic and macroeconomic standpoint.

2.3. Challenges to English-taught education

The advancement of digital technologies and the expansion of both local and global online e-learning markets are also impacted by the use of English in international education, especially given the risks posed by pandemics, financial and geopolitical crises, and natural disasters.

Some examples can be seen from Türkiye and Poland, which have made headway in internationalising their education sectors, but face a unique mixture of national, economic, historical, and geographical challenges in promoting themselves as destinations that aim to give students access to valuable education of quality.[11]

In addition to these challenges, English as a language of instruction is also coming into question by some study destinations. In 2021, Denmark chose to reduce the number of ETPs institutions sought to offer,[12] while the Netherlands unveiled plans to reduce ETPs in 2023,[13] each with the aim to restrict the flow of international students choosing to study at these or other similar destinations.

Similarly, three of the Big Four study destinations have implemented policies that restrict international student mobility globally. Australia aims to cap the overall number of international students,[14] Canada has introduced regional limitations,[15] and the UK has tightened its visa policy towards student dependents.[16] Additionally, the upcoming elections in the USA have created an atmosphere of uncertainty regarding future policies.

These emerging challenges are likely to prompt shifts in policy frameworks, institutional operations, and individual practices. They carry significant implications for the quality, recovery, sustainability, and progression of international education. Although the sector faces a challenging period, often referred to as a 'cold winter,' the expansion of ETPs in various regions around the world offers new opportunities for growth, competition, and portfolio development. Compared to 2021, prospective international students continue to have access to a broad

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[9] ICEF Monitor (2024) "Demand for study abroad rising in China but students considering more destinations in 2024". Retrieved on 23 May 2024 from https://monitor.icef.com/2024/02/demand-for-study-abroad-rising-in-china-but-students-considering-more-destinations-in-2024/; see also Sharma, S. (2024) "This is why many Indian students are opting for offbeat study destinations". *The Times of India*. Retrieved on 23 May 2024 from https://timesofindia.indiatimes.com/education/study-abroad/surge-in-indian-students-choosing-offbeat-study-destinations/articleshow/107882649.cms.

[10] *British Council* (2024) "The outlook for international student mobility: Amidst a changing global macroeconomic landscape". Retrieved 23 May 2024 from https://shorturl.at/ZvA7s

[11] Tran *et al.* (2023)

[12] Uddannelses-og Forskningsministeriet (2021) "Ny politisk aftale begrænser SU-udgifter til udenlandske studerende fra EU". Retrieved on 23 May 2024 from https://shorturl.at/M1Y2H.

[13] ICEF Monitor (2024) "Dutch Universities detail plan to reduce international enrolment". Retrieved on 23 May 2024 from https://monitor.icef.com/2024/02/dutch-universities-detail-plan-to-reduce-international-enrolment/.

[14] Ziguras, C. (2024) "What's behind the bid to cap international student places?". *University World News*. Retrieved on 23 May 2024 from https://shorturl.at/mOKFs.

[15] ICEF Monitor (2024) "Canadian immigration minister releases official cap figures and targets for 2024". Retrieved on 23 May 2024 from https://t.ly/U-PCt

[16] McKinney, C. & Gower, M. (2024) "Changes to legal migration rules for family and work visas in 2024". *House of Commons Library*. Retrieved on 23 May 2024 from https://commonslibrary.parliament.uk/research-briefings/cbp-9920/

market of programmes. These programmes are designed to meet students' needs for quality education and affordability, ensure an enjoyable student experience, and prepare them effectively for the labour market.

3. Methodology

3.1. Data Sources

The foundation of this analysis is the anonymous behavioural data that has been captured from users on the Studyportals' websites since 2013. This dataset is uniquely large: currently, the records of more than 55 million individual users are added every 12 months, covering more than 220 countries and territories. These visitors generate over 60 million sessions and more than 45 million programme pageviews annually. This large amount of information has been cleaned, validated and organised.

As Studyportals only operates one English-language platform with no country-specific websites, visitors are well-distributed across the entire globe, providing a reliable, internationalised representation of prospective students interested in English-taught education.

Our database contains programme-level information for more than 240,000 individual studies, making Studyportals the largest platform for English-taught education globally. According to our estimates on total market size, this covers more than 90% of all ETPs offered globally at a Bachelor's and Master's level that are open to international students.

In particular, the data primarily used for the analysis in this report focuses on **on-campus** ETPs offered at a **Bachelor's** or **Master's** level, unless indicated otherwise. In addition to this, the data showcases insights largely focused on the supply of programmes up to and including **March 2024**; however, in some cases the data offers comparisons of programme supply for January 2019 against March 2024, or the whole year 2019 against 2024.

Lastly, it is important to note that the scope of this report is to analyse and draw conclusions on the supply of on-campus ETPs offered by non-Anglophone countries, especially the Big Four study destinations (the UK, the US, Australia, and Canada). The analysis includes a regional focus on non-Anglophone countries, grouping them into the Americas, the European Higher Education Area (EHEA), Sub-Saharan Africa (SSA), the Middle East and North Africa (MENA), and Asia which is split into the Chinese Region, South Asia, and East Asia.

This split for Asia is designed to highlight the growing importance of different destinations as suppliers within the region, while acknowledging the densely populated recruitment markets in Asia that these suppliers aim to attract and encourage students to study closer to home.

3.2. Data Quality

To keep the database up-to-date, our more than 40 people strong data team maintains an elaborate updating schedule, proactively monitoring rankings and gathering information from university websites. It is our aim to update each programme at least once a year, with more regular updates of key information, such as tuition fees.

As of March 2024, the Data Quality Score totalled 97.27 out of 100 possible points.

Our dataset reflects both the natural increase in global programme supply and Studyportals' commercial objectives to identify and catalogue ETPs. Thus, while some study destinations may show a sudden surge in programme availability, this often results from a combination of the country's efforts to enhance its competitiveness in higher education and Studyportals data collection initiatives. However, despite these apparent spikes in supply by individual countries, their global programme share remains relatively small and does not significantly impact the findings of this report.

Students predominantly search for programmes based on general disciplines such as Business & Management or Computer Science & IT, rather than specific programme names. For this reason, currently we are maintaining a list of 15 parent disciplines and 283 subdisciplines, based on commonly used categorisations as well as past user search behaviour. When a programme is added to our database, it is attached to up to three matching disciplines. This allows for easy segmentation of our data. Therefore, throughout this report, pageviews on programme details pages are used as an indicator for student interest, as this is the strongest and most granular indicator available.

3.3. Methodology constraints

Due to its nature, the Studyportals dataset is subject to certain restrictions that should be taken into account in the analysis and decision-making process.

Offline recruitment

The Studyportals dataset is limited to providing insights of students researching their study options online on the Studyportals' websites. Thus, this may create an incomplete picture for countries or subjects with a high amount of offline recruitment. However, more students are now incorporating Studyportals into their search process, alongside local recruitment agents.

Studyportals-specific trends

The development of pageviews on the Studyportals' websites is not only dependent on the development of the global student demand but also other internal and external factors such as website improvements, competition, Google Search algorithm updates etc. For this reason, most insights presented in this report are based on relative comparisons, rather than absolute numbers.

Homogeneity of class sizes

Since higher education institutions do not publish class sizes, the analysis assumes that the class size is the same for every listed programme. Outside of the market model, programmes may differ by the number of students involved.

Representation of institutions

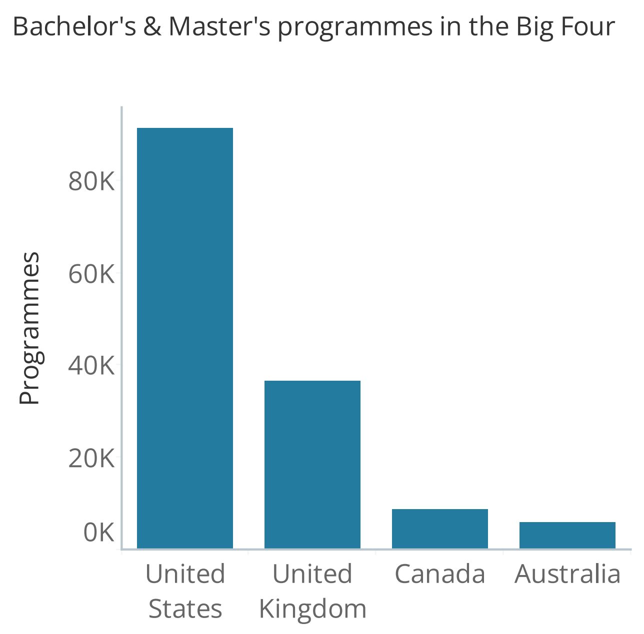
Studyportals data on institutions worldwide covers a large share of the world supply of English-taught education. The coverage includes highly ranked institutions based on the major university rankings offering ETPs, as well as smaller providers also focused on teaching in English, totalling to over 3,500 institutions.

4. International Landscape

4.1. Supply and growth over time

Reflecting on the 2021 report,[17] Studyportals has recently mapped a total of 183,262 on-campus bachelor's and master's English-taught programmes (ETPs) offered globally, indicating a 22% increase by March 2024. While a significant part of these programmes are still offered by the Big Four anglophone destinations (the UK, the US, Canada, and Australia), the global share of ETPs that they supply has slightly lessened (from 82% in 2021 to 78% in 2024), highlighting that more ETPs are now offered outside the Big Four. Although a slight change, it is still valuable and relevant to take note of what this could mean for the landscape of ETPs around the world.

Figure 1. Supply of ETPs offered by the Big Four study destinations, March 2024



Since 2019, the number of ETPs outside the Big Four have increased by 48%, which further supports the notion of how the higher education market has shifted when it comes to the offer of ETPs internationally, where the focus is no longer only on the Big Four. Meanwhile, on-campus master's programmes continue to be the most common worldwide, accounting for 63% of those offered outside the Big Four countries.

Among the fastest-growing disciplines, ETPs are increasingly being offered within Computer Science & IT – which includes fields such as Artificial Intelligence, Machine Learning, Software Engineering, or Data Analytics – which grew by 63% for on-campus bachelor's and master's programmes, alongside Natural Sciences & Mathematics and Agriculture and Forestry (62% respectively).

Beyond this, Studyportals data also saw notable growth for Environmental Studies & Earth Sciences (58%), Humanities (58%), Medicine & Health (57%), Engineering & Technology (54%), and Education & Training (50%).

[17] Neghina, C. & Agnew, M. (2021) "The changing landscape of English-taught programmes". *British Council IELTS* and *Studyportals*. Retrieved 15 May 2024 from https://studyportals.com/wp-content/uploads/2021/12/British-Council_Studyportals_The-changing-landscape-of-English-taught-programmes-in-2021.pdf

The world ahead

It is not surprising that the growth of ETPs outside the Big Four over the past five years has historically been a European affair, with Western European countries reassessing their internationalisation objectives by focusing less on attracting students and more on providing academic excellence. This also means that the growth of ETPs is likely to slow down for this region.

This is apparent as the supply of on-campus bachelor's and master's programmes has largely stabilised in 2023, following the growth between 2021 and 2022, with a future rise in programmes forecasted to remain generally stable. Conversely, even though on-campus PhD programmes have not been at the forefront, the forecasted growth will likely be significant enough to show that such programmes might play a bigger role in the future of the higher education market.

Studyportals data suggests that much of the growth of ETPs worldwide will materialise in Asia, in particular in the Chinese Region which is forecasted to overtake Europe in overall number of programmes supplied by the end of the 20s, alongside East Asia. This indicates that other study destinations are looking to become more competitive with developed destinations, but also as more students begin to consider studying closer to home.

Figure 2: Projected growth of ETPs

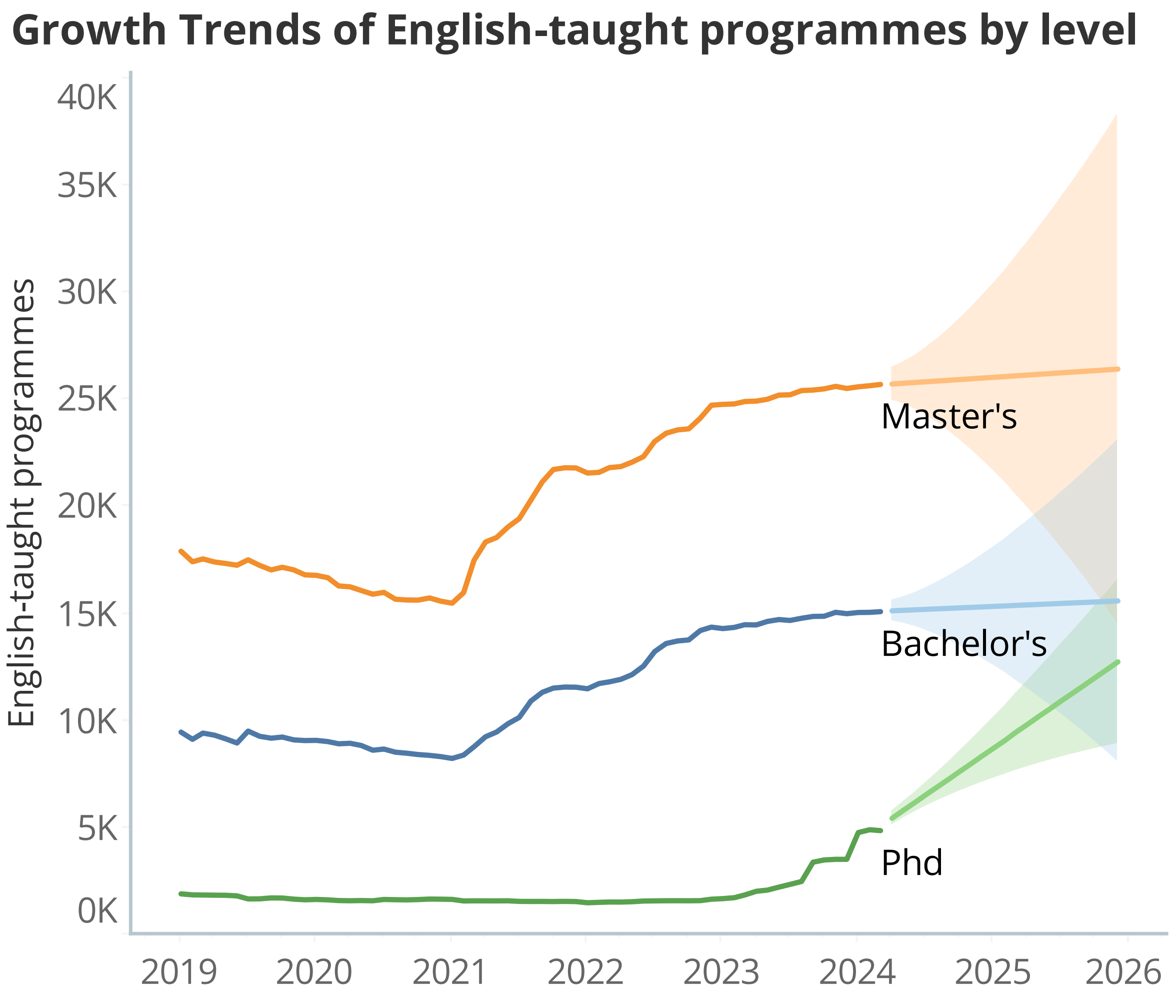


Figure 3: Change of ETPs outside the Big Four Destinations

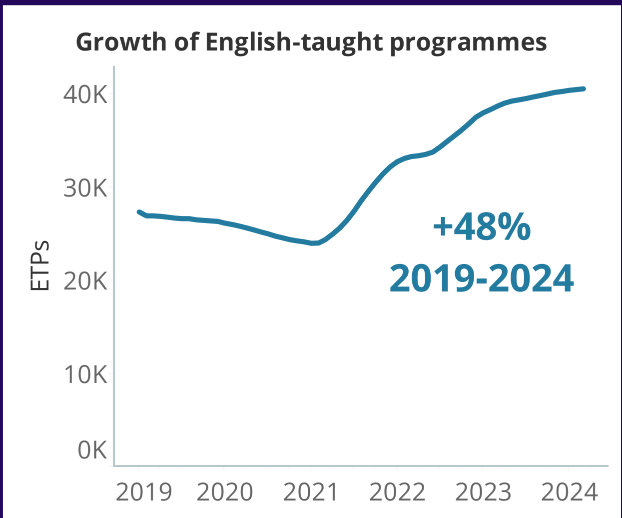


Figure 4: Change of ETPs outside the Big Four by study level

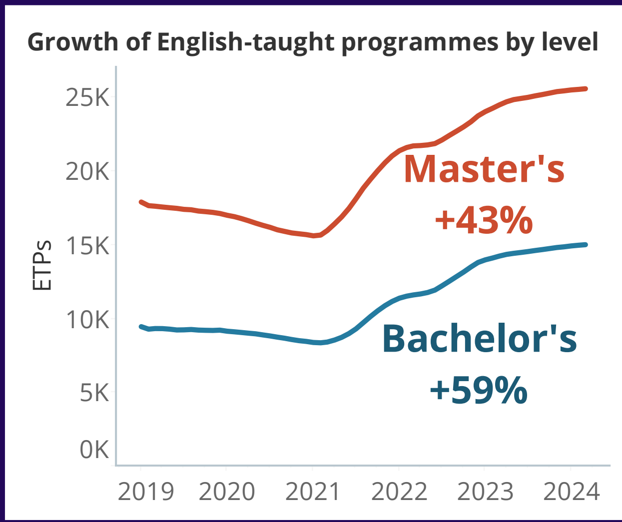


Table 1: Growth by discipline, Bachelor's level 2019-2024

Between 2019 and 2024 7,733 ETPs were added at a bachelor's level outside the Big Four

Humanities	80%
Environmental Studies & Earth Sciences	78%
Computer Science & IT	73%
Natural Sciences & Mathematics	67%
Journalism & Media	65%
Agriculture & Forestry	65%
Education & Training	64%
Law	64%
Engineering & Technology	62%
Medicine & Health	60%
Business & Management	56%
Social Sciences	55%
Applied Sciences & Professions	51%
Arts, Design & Architecture	44%
Hospitality, Leisure & Sports	38%

Table 2: Growth by discipline, Master's level 2019-2024

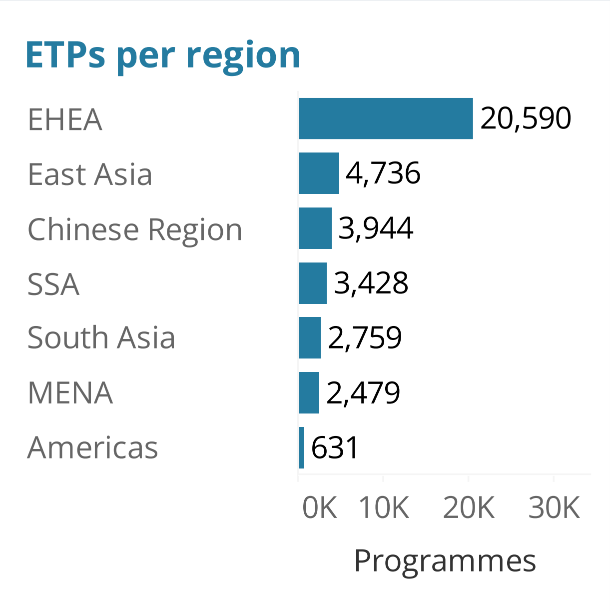
Between 2019 and 2024 10,751 ETPs were added at a master's level outside the Big Four

Natural Sciences & Mathematics	60%
Agriculture & Forestry	60%
Computer Science & IT	57%
Medicine & Health	55%
Environmental Studies & Earth Sciences	53%
Engineering & Technology	49%
Humanities	47%
Hospitality, Leisure & Sports	46%
Education & Training	43%
Journalism & Media	36%
Law	35%
Business & Management	35%
Applied Sciences & Professions	34%
Social Sciences	26%
Arts, Design & Architecture	24%

4.2. Regional differences

As shown in Figure 5, the majority of the 40,786 on-campus ETPs offered by countries outside the Big Four are located in the EHEA region (50%), followed by East Asia with 12%. The Chinese region supplies 10% of these programmes, while SSA provides 8%. While South Asia, and the MENA offer relatively smaller number of programmes than other regions at 7% and 6% respectively, institutions in the Americas offer a vastly smaller proportion of ETPs (2%).

Figure 5: ETPs per region



It is important to note that, as the UK is included in the Big Four group of countries, it is not included in the analysis of programme supply in the EHEA region. Considering this, the EHEA has indicated a 17% growth in the number of ETPs offered on the global higher education market.

Table 3 indicates that the countries that stand out in the EHEA region in terms of the size of their ETP offers are Ireland, the Netherlands, and Germany.

Türkiye, France, Spain, and Italy follow suit by providing significant portfolio sizes, each showing over a thousand of programmes.

Furthermore, it is valuable to highlight that the availability of ETPs in East Asia has far surpassed the supply of the Chinese region, which is a considerable shift from what was seen in the 2021 report. As a result, this puts East Asia in a new perspective as it expands on the internationalisation of programmes, in particular with programmes offered by Malaysian institutions.

Meanwhile, SSA indicates a relatively close number of programmes to countries in the Chinese region, with South African institutions offering more ETPs than China. Other SSA countries that offer a credible number of ETPs include Nigeria and Uganda.

Among other markets for ETPs, both South Asia and the countries in MENA act as powerful regional hubs. In the former, Indian institutions offer the majority of ETPs alongside those based in Pakistan, while the United Arab Emirates acts as the main player alongside Iran.

Institutions in the Americas remain trailing behind in their supply of ETPs, especially when one considers that Jamaica supplies 79% of the programmes in the region.

Table 3: Institutions and programmes by main countries

	Destinations	Institutions	Programmes
Big Four	United States	1,181	91,238
	United Kingdom	191	36,671
	Canada	106	8,783
	Australia	53	5,784
EHEA	Ireland	25	2,595
	Germany	195	2,269
	The Netherlands	55	2,104
	Türkiye	47	1,602
	France	144	1,323
	Italy	83	1,212
	Spain	81	1,027
	Other EHEA	540	8,458
East Asia	Malaysia	32	2,397
	Japan	57	554
	South Korea	21	489
	Thailand	23	467
	Other East Asia	27	829
Chinese Region	China	122	2,296
	Hong Kong	15	1,116
	Taiwan	36	432
	Macao	3	100
SSA	South Africa	22	2,772
	Nigeria	4	160
	Uganda	2	145
	Other SSA	12	351
South Asia	India	43	1,610
	Pakistan	13	913
	Sri Lanka	2	141
	Other South Asia	3	95
MENA	United Arab Emirates	27	719
	Iran	12	651
	Palestine	2	217
	Israel	8	181
	Egypt	5	163
	Saudi Arabia	6	150
	Other MENA	10	398
Americas	Jamaica	3	499
	U.S. Virgin Islands	1	26
	Belize	2	25
	Mexico	3	24
	Other Americas	14	57

By considering the distribution of on-campus ETPs by discipline area and per region, we can observe insights into which fields are being prioritised and the regions that are working to improve their portfolios by adding more programmes that perhaps align with students' interests.

For instance, since January 2019, South Asian institutions have significantly increased their programme supply across several disciplines, such as Agriculture & Forestry and Hospitality, Leisure & Sports. This reflects the region's continuous efforts to expand the diversity of ETPs on offer.

Not surprisingly, the MENA region also showed a high increase in Hospitality, Leisure & Sports by March 2024. However, it is important to note that such high rates of growth are associated with the relatively small number of programmes that MENA-based countries offer, and in turn strongly influences the noticeable rise in supply.

Conversely, while countries from the Americas exhibit the lowest regional supply of ETPs, they have also shown no growth in certain disciplines since January 2019. This indicates a lower priority for on-campus ETPs in the region, with fewer programmes being supplied as of March 2024 in fields like Medicine and Hospitality.

In general, there is a notable rise of on-campus ETPs globally which indicates the increasing interest from institutions to develop their portfolios and make room for more international recruitment.

Table 4: Programme growth by discipline and region

	Big Four	EHEA	East Asia	Chinese Region	SSA	South Asia	MENA	Americas
Agriculture & Forestry	+56%	+23%	+127%	+358%	+46%	+1350%	+294%	+0%
Applied Sciences & Professions	+68%	+14%	+105%	+91%	+24%	+245%	+77%	+10%
Arts, Design & Architecture	+125%	+2%	+108%	+88%	+53%	+298%	+81%	+84%
Business & Management	+91%	+16%	+156%	+95%	+46%	+318%	+118%	+59%
Computer Science & IT	+109%	+33%	+124%	+137%	+58%	+284%	+168%	+119%
Education & Training	+163%	+4%	+129%	+84%	+102%	+161%	+133%	+67%
Engineering & Technology	+64%	+21%	+101%	+131%	+31%	+216%	+98%	+100%
Environmental Studies & Earth Sciences	+76%	+31%	+144%	+188%	+44%	+288%	+154%	+46%
Hospitality, Leisure & Sports	+85%	+13%	+222%	+128%	+28%	+820%	+500%	-17%
Humanities	+181%	+21%	+111%	+102%	+104%	+355%	+140%	+93%
Journalism & Media	+95%	+20%	+117%	+129%	+50%	+475%	+47%	+71%
Law	+83%	+8%	+163%	+74%	+103%	+467%	+154%	+12%
Medicine & Health	+75%	+15%	+149%	+207%	+31%	+146%	+211%	-42%
Natural Sciences & Mathematics	+126%	+21%	+114%	+196%	+44%	+525%	+198%	+78%
Social Sciences	+123%	+9%	+102%	+103%	+54%	+379%	+107%	+100%

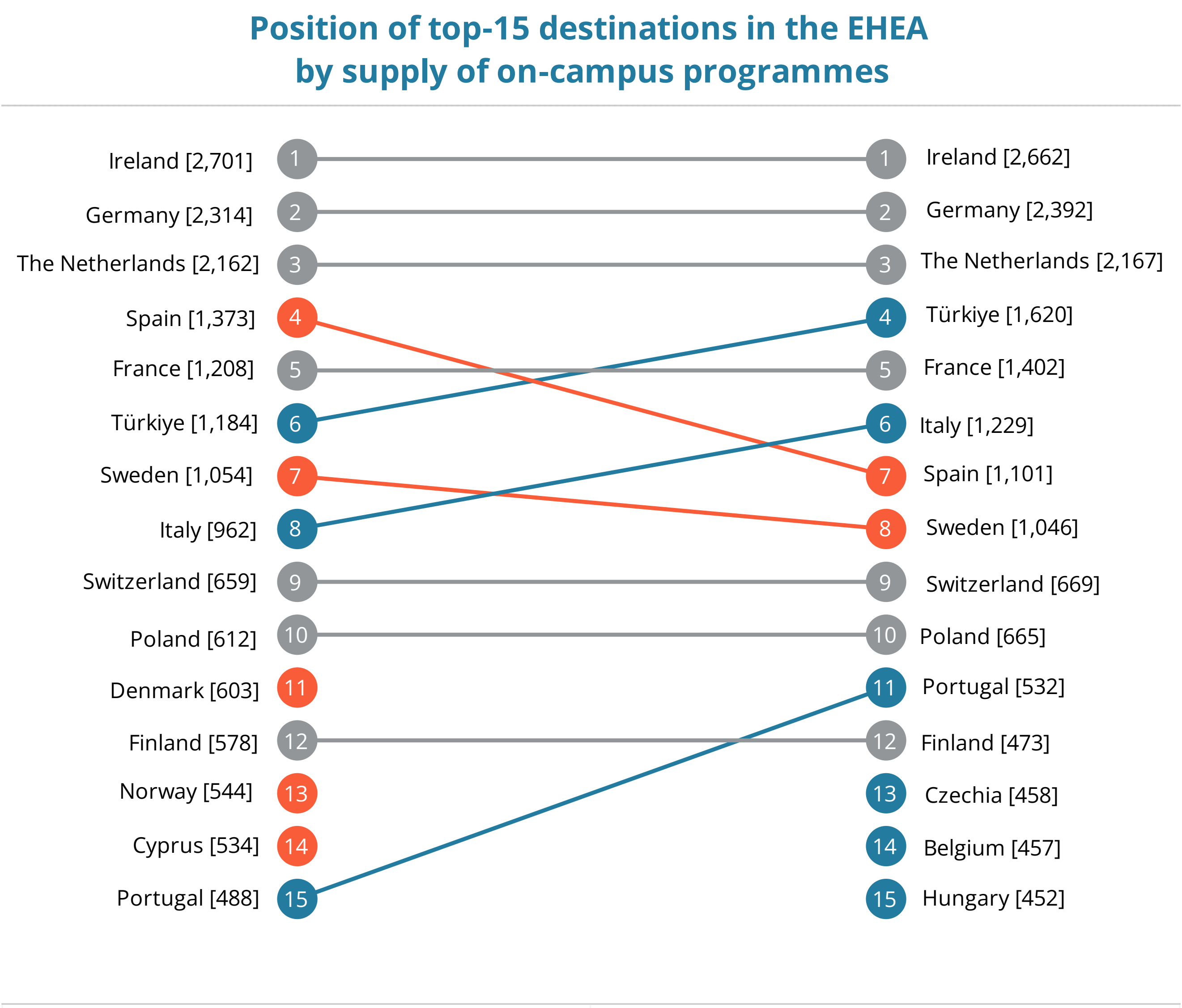
Shifts in EHEA suppliers

As noted thus far in this report, the EHEA region offers a significant supply of on-campus ETPs at a bachelor's and master's level beyond the Big Four study destinations. In relation to this, Ireland, Germany, and the Netherlands maintain a firm position as the leading suppliers of on-campus ETPs when comparing supply in 2019 to 2024.

Aside from these top-3 suppliers in the region, some of the largest supply growth comes from Türkiye, Italy, and Portugal, as a result rising up the ladder of the top-15 EHEA suppliers. Institutions in Czechia, Belgium, and Hungary also expanded their offerings, so much so that they appear within the top-15 suppliers for the EHEA region for 2024.

On the other hand, Spain and Sweden have reduced their supply of on-campus ETPs in 2024, leading to a decline in their positions compared to 2019. Similarly, Denmark, Norway, and Cyprus have also experienced a decrease in their positions as suppliers by 2024. Spain and Sweden now occupy lower positions (7th and 8th, respectively) than in 2019, while Norway and Cyprus have completely dropped out of the top-15 list. This shift has created opportunities for other countries that have introduced new programmes in their institutions.

Figure 6: Position of top-15 destinations in the EHEA region



4.3. Breakdown by Institution

Since this report observes the selected regions based on their supply of on-campus ETPs, it is equally essential to examine the providers. This means looking towards the number of higher education institutions (HEIs) that supply such programmes, and more importantly assess the proportion of programmes offered per HEI within each region.

The metric "programmes per institution" serves as a vital indicator of institutional strength, competitiveness, and commitment to offer student diverse educational options that prepare them for future success in their careers.

It remains important to note, however, that non-anglophone countries not only offer on-campus ETPs but also offer studies that instruct students in the local language(s). Hence, it may certainly be the case that ETPs do not make up the bulk of the studies offered by institutions.

While it is evident that HEIs in certain regions offer a small portion of ETPs, when comparing the share of those programmes per institution, some regions offer greater volume than others. For instance, HEIs in SSA and South Asia have higher rate of programmes per institution than the EHEA region, alongside the MENA region with nearly double the rate.

Table 5: ETPs and HEIs per region

	Institutions	Programmes	Programmes per Institution
Total	1,701	38,567	263
EHEA	1,170	20,590	18
East Asia	160	4,736	30
Chinese Region	176	3,944	22
SSA	40	3,428	86
South Asia	62	2,759	45
MENA	70	2,479	35
Americas	23	631	27

However, when breaking this down by the size of an HEI's on-campus ETP portfolio, Table 6 displays a different story. Considering this aspect, 87% of HEIs in the Americas provide less than 20 programmes, with more than 72% of HEIs in the EHEA, East Asian, and Chinese regions supplying less than 30 on-campus ETPs.

Meanwhile, the share of HEIs by portfolio size is more spread out for other regions, as can certainly be seen for South Asian, MENA, and the Big Four institutions.

Table 6: Distribution of HEIs by region

HEIs by ETP portfolio size

	less than 10 programmes	< than 20 ETPs	< than 30 ETPs	< than 40 ETPs	< than 50 ETPs	< than 100 ETPs	more than 100
Americas (23)	70%	17%	4%	0%	4%	0%	4%
EHEA (1,170)	55%	22%	8%	5%	2%	5%	3%
East Asia (160)	49%	16%	7%	7%	3%	11%	8%
Chinese Region (176)	47%	23%	9%	7%	3%	7%	4%
SSA (40)	40%	10%	0%	3%	3%	20%	25%
South Asia (62)	24%	15%	10%	8%	10%	19%	15%
MENA (70)	20%	20%	23%	9%	7%	16%	6%
Big Four (1,532)	14%	6%	6%	10%	9%	24%	30%

Academic atlas

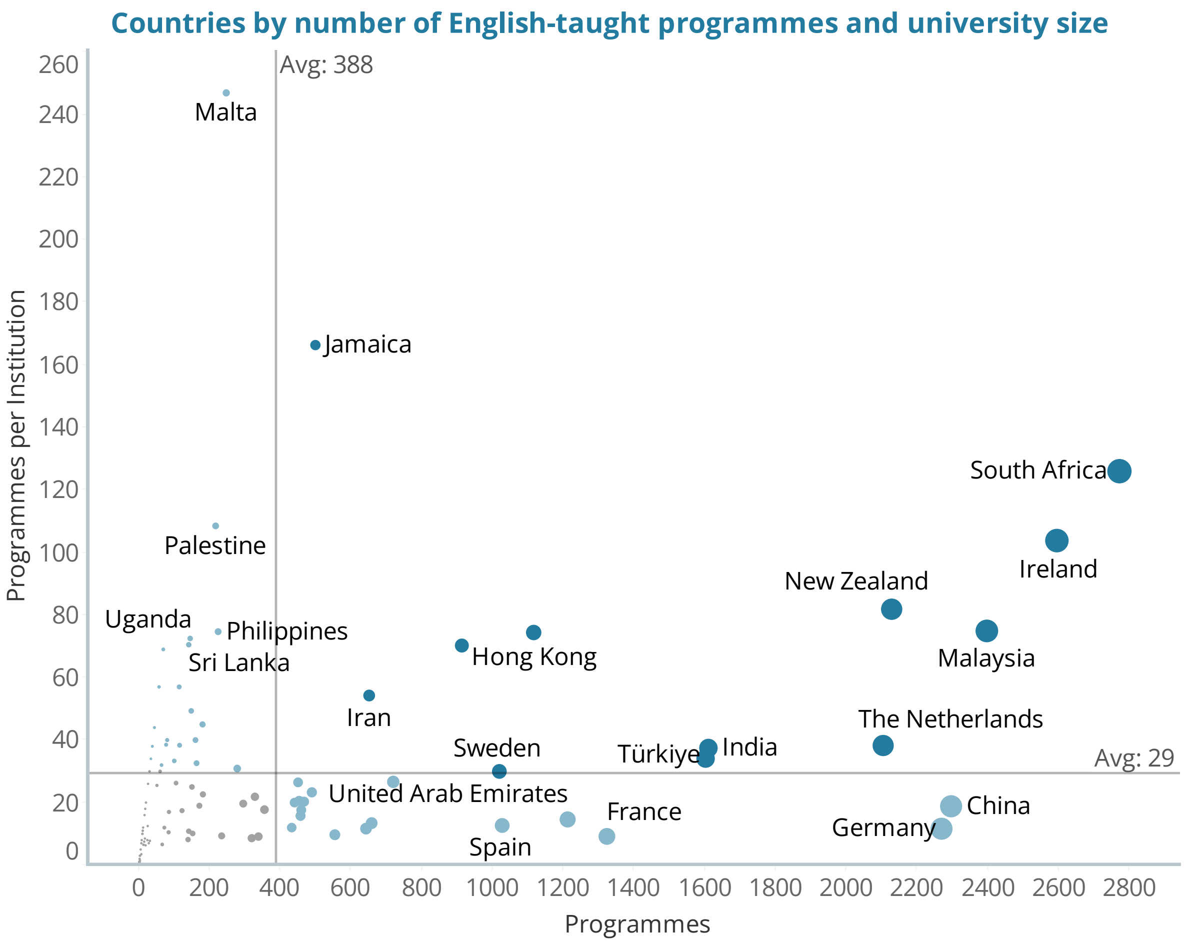
Although comparing and contrasting between the observed regions can provide a clear macroscopic image of the current trends surrounding on-campus ETPs, some key insights may still be hidden within each region. Therefore, Studyportals mapped the countries outside the Big Four study destinations by their rate of programmes per institution and the size of their on-campus ETP portfolio. As a result, Figure 8 highlights how South Africa is a crucial destination given the high number of ETPs it supplies, alongside other suppliers such as Ireland, New Zealand, Malaysia, and the Netherlands.

As of March 2024, more study destinations are joining the group of those that have above-average programmes shown in **dark blue**. Notably, India, Türkiye, and Jamaica are among those with a greater supply of programmes.

The **light blue** countries such as France, Spain, China, and the UAE have sizeable ETP portfolios spread over several institutions. It is interesting to note that Malta is an outlier; although it offers far fewer programmes than other countries, these are heavily concentrated in a small number of institutions. Furthermore, while countries may be clustered into similar categories, those countries could be at different stages of developing their offers to align with regional and global competitors or according to the overall trends of international student mobility.

For instance, among those developing their on-campus ETP offers (in **light blue**), Germany, Spain, and France are significantly more developed than China and the UAE. Even within more selective clusters there are outliers, such as Malaysia and Hong Kong, that appear well-developed in their ETP offerings.

Figure 7: Countries by number of ETPs and university size



As various study destinations continue to advance their internationalisation agendas via diverse strategies, it is evident that some have more developed markets for on-campus ETPs. Thus, to distinguish between different stages of market maturity in higher education, Studyportals conducted an in-depth analysis using specific proxy measures: university rankings; presence of educational hubs; and diversity of disciplines within portfolios.

4.4. Global rankings

It is an established fact that both prospective international students and institutions value the assessments of ranking bodies, with the former including an institutions position globally in their decision making process. Essentially, rankings have served as a guiding point for stakeholders to benchmark and differentiate between institutions based on their performance according to academic, service-oriented, and international and gender diversity criteria.

While Times Higher Education's World University Ranking (WUR) represents different aspects of the academic world, the proportion of international students is one dimension where institutions can strive to make progress and gain a competitive edge. The primary reason behind this is that an institution's international student body not only contributes to an improved ranking but strengthens the attraction towards international students and professors.

Globally, for every 16 unranked institutions offering on-campus ETPs, Studyportals found 9 ranked institutions.

Considering the 2024 WUR, there are differences in the share of ranked and unranked institutions and on-campus programmes across the regions. For instance, most institutions in the Americas are unranked (83%), but then have the majority of on-campus offers supplied by ranked institutions (73%). This indicates a wide disparity in the quality despite a more competitive programme landscape.

Meanwhile, MENA and SSA have a higher share of ranked institutions and programmes than some developed countries. This suggests that while there are less institutions in these emerging regions, a significant proportion meets global ranking criteria, possibly due to the focused development of the tertiary education system.

It is also worth noting how countries and regions with well-established higher education systems, like the UK and EHEA, see a substantial number of ranked programmes. For instance, 41% of EHEA institutions are ranked, but then see nearly 70% of on-campus ETPs coming from ranked institutions. This suggests that while there may be less ranked institutions, these do offer a high number of globally competitive programmes.

The ratio of on-campus Bachelor's and Master's programmes offered by unranked to ranked institutions is 21 : 29.

Table 7: Share of ranked and unranked institutions by region

	Unranked	Ranked	Top-100
Americas (23)	83%	17%	-
Chinese Region (176)	41%	52%	7%
East Asia (160)	28%	68%	4%
EHEA (1,170)	59%	39%	2%
MENA (70)	40%	60%	-
South Asia (62)	24%	76%	-
SSA (40)	48%	53%	-
Australia & New Zealand (79)	43%	49%	8%
Canada (106)	72%	25%	3%
UK (191)	44%	50%	6%
USA (1,181)	85%	12%	3%

Table 8: Share of ranked and unranked programmes by region

	Unranked	Ranked	Top-100
Americas (631)	27%	73%	-
Chinese Region (3,944)	32%	41%	27%
East Asia (4,736)	19%	73%	8%
EHEA (20,590)	33%	59%	8%
MENA (2,479)	30%	70%	-
South Asia (2,759)	9%	91%	-
SSA (3,428)	14%	86%	-
Australia & New Zealand (7,912)	6%	76%	18%
Canada (8,783)	40%	49%	10%
UK (36,671)	15%	71%	14%
USA (91,238)	63%	28%	9%

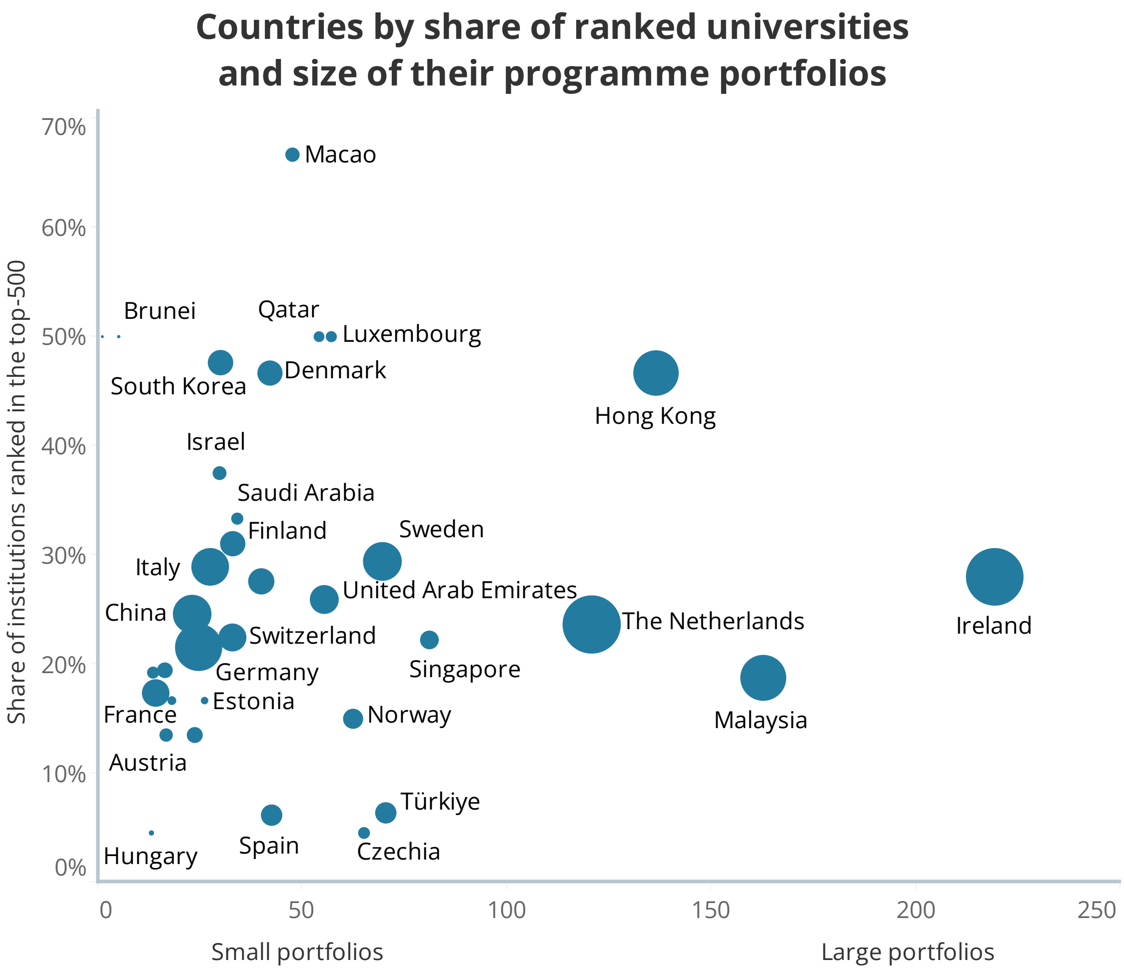
It is also important to consider how the proportion of ranked institutions within a country may be impacted by the supply of on-campus ETPs. For instance, Ireland, Hong Kong, and the Netherlands each have a high proportion of institutions ranked in the top-500 and also have a large portfolio of on-campus ETPs. This may suggest a correlation between robust ETP portfolios with higher institutional rankings, potentially attracting international students and faculty.

However, there is also a notable distinction in the size of on-campus ETPs and the share of top-ranked institutions across different countries. Take Macao as an example which has a high percentage of top-ranked institutions but a relatively smaller portfolio. This is also the case for Luxembourg, Qatar, and Denmark, each having a strong share of institutions in the top-500, but maintaining relatively small portfolios. This indicates that despite smaller numbers of English-taught offerings, these countries achieve high rankings, possibly due to quality in other areas like research, faculty expertise, or student outcomes.

Meanwhile, countries such as China, Italy, Germany, the Netherlands, Ireland, and Malaysia have sizable portfolios of on-campus ETPs but have a lower percentage of their institutions ranked in the top 500.

This might imply that while having a large portfolio can enhance accessibility and attract international students, it does not automatically lead to higher rankings, which may depend more on the quality and impact of institutional offerings.

Figure 8: Size of ETP offering and position in THE WUR ranking (2024)



4.5. City Hubs

While it may not be the primary factor, the host city plays a significant role in a prospective student's decision to study abroad, with city inherently linked to the country and its educational institutions. Furthermore, cities vary widely in terms of living costs and affordability tied to food, housing, and personal items.

In defining a hub, Studyportals marked cities hosting at least 10 higher education providers. 14 of the 19 cities clearing the threshold are in the EHEA, which once again confirms the crucial role covered by the region in the provision of ETPs outside the main anglophone speaking destinations. That being said, it remains important to remember that the EHEA region includes all the signatory members of the Bologna process and stretches well beyond Western Europe: Istanbul and Moscow also emerge as important hubs for ETPs.

Similar to 2021, institutions based in Paris, Berlin, Barcelona, Milan, and Vienna continue to appear as the largest hubs outside the Big Four in terms of HEIs offering ETPs.

Beyond the EHEA region, other cities that also have 10 or more institutions include Dubai, Beijing, Shanghai, Taipei, and Bangkok.

Figure 9: City hubs by number of universities offering ETPs

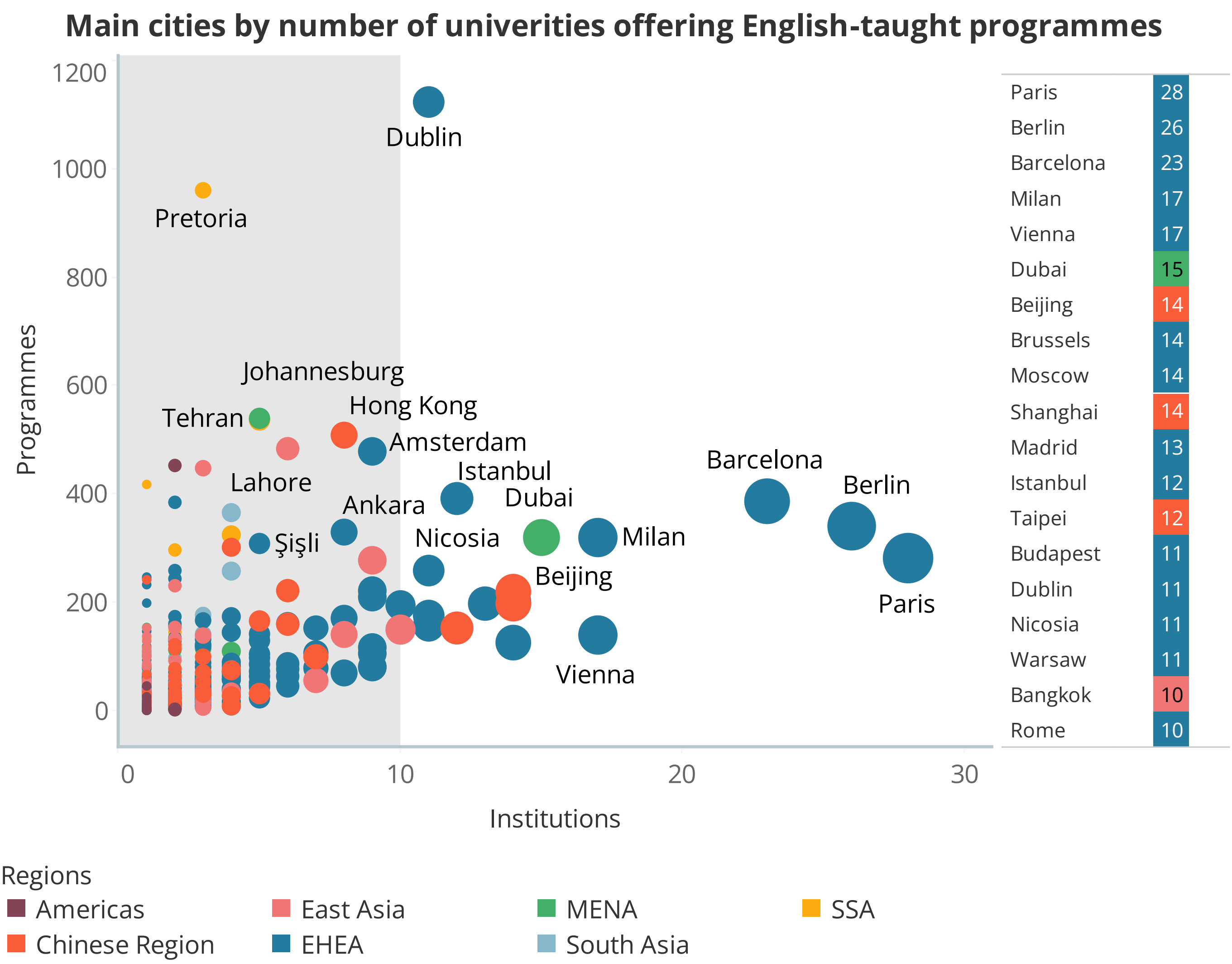


Figure 10 maps out those cities, regardless of region, with at least 10 institutions (represented by the dark blue dots). The size of each dot is proportional to the number of programmes offered in each city, with surrounding colour cloud being indicative of the programme density offered in a given location.

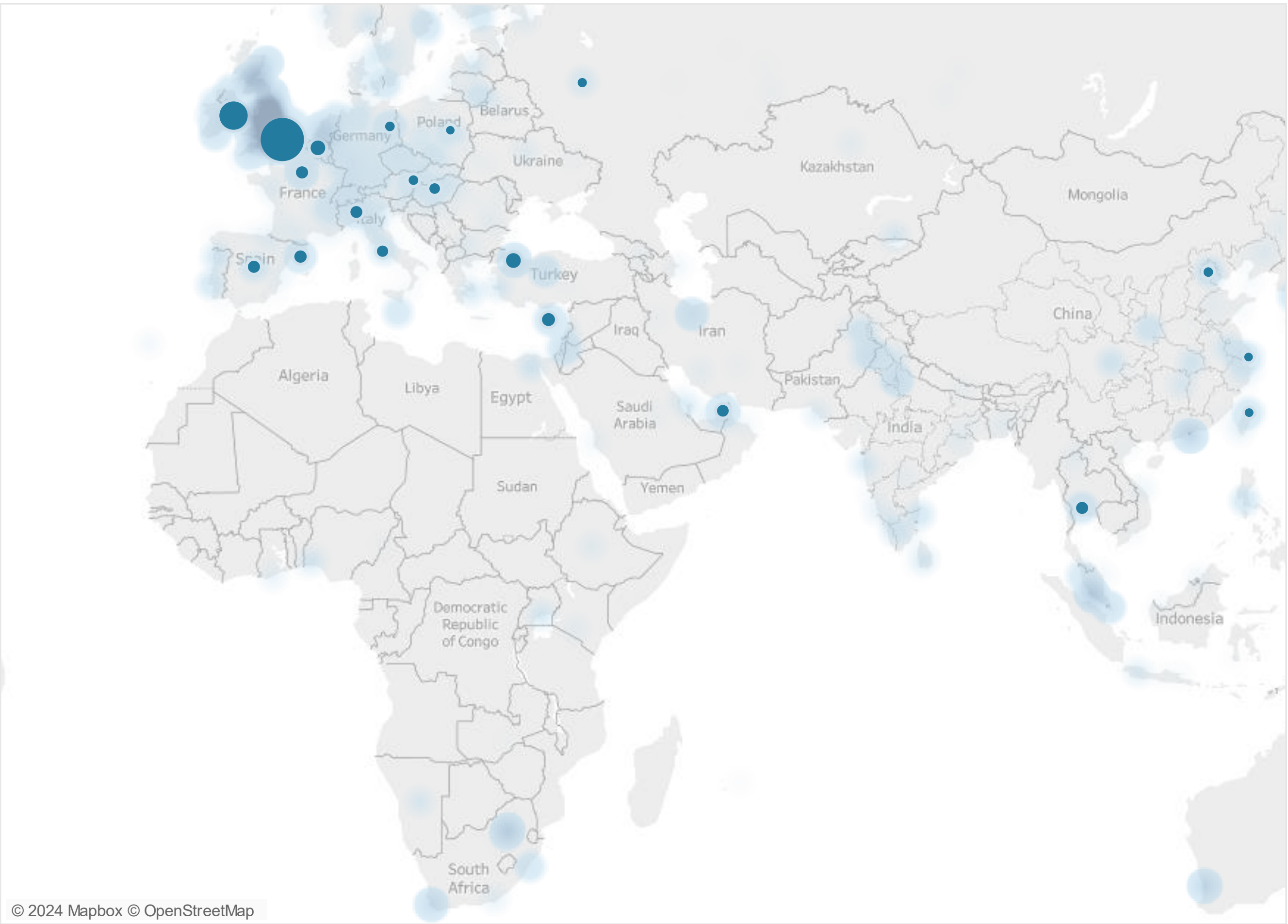
globally, there remain certain locations that host a high number of institutions such as Bangkok, Barcelona, Beijing, Dublin, London, Los Angeles, Moscow, Paris, Vienna, Warsaw, among others. Such institutional presence indicates where students are more likely to study abroad.

Moreover, on-campus ETPs appear to be more dispersed across the continents instead of being concentrated in certain regions. This can be seen by the relatively lighter blue clouds which highlight an even spread of programmes supplied on a national level.

In other words, while 28 cities worldwide host over 10 institutions each, offering a combined total of more than 21,000 on-campus programmes, there are also more than 1,750 cities with fewer than 10 institutions each, yet these smaller cities together offer nearly 160,000 programmes. This disparity highlights that cities with fewer institutions should not be overlooked, particularly if there is promising potential to attract international students.

Figure 10: Destination countries and programmes offered

Programmes worldwide and cities with at least **10 programme providers**



Blue dots show the cities with at least 10 programme providers.

The size of each dot is proportional to the number of programmes offered.

The blue cloud shows the location of programmes.

The darker the colour the more programmes offered in a given location.

4.6. Discipline diversification

As institutions strive to enhance their global reputation through best practices, portfolio diversification is another primary area they have direct control over when developing their strategies to distinguish themselves from the Big Four. This is important given the market changes taking place globally as more job positions require digital skills and a greener, sustainability-minded focus for doing business.

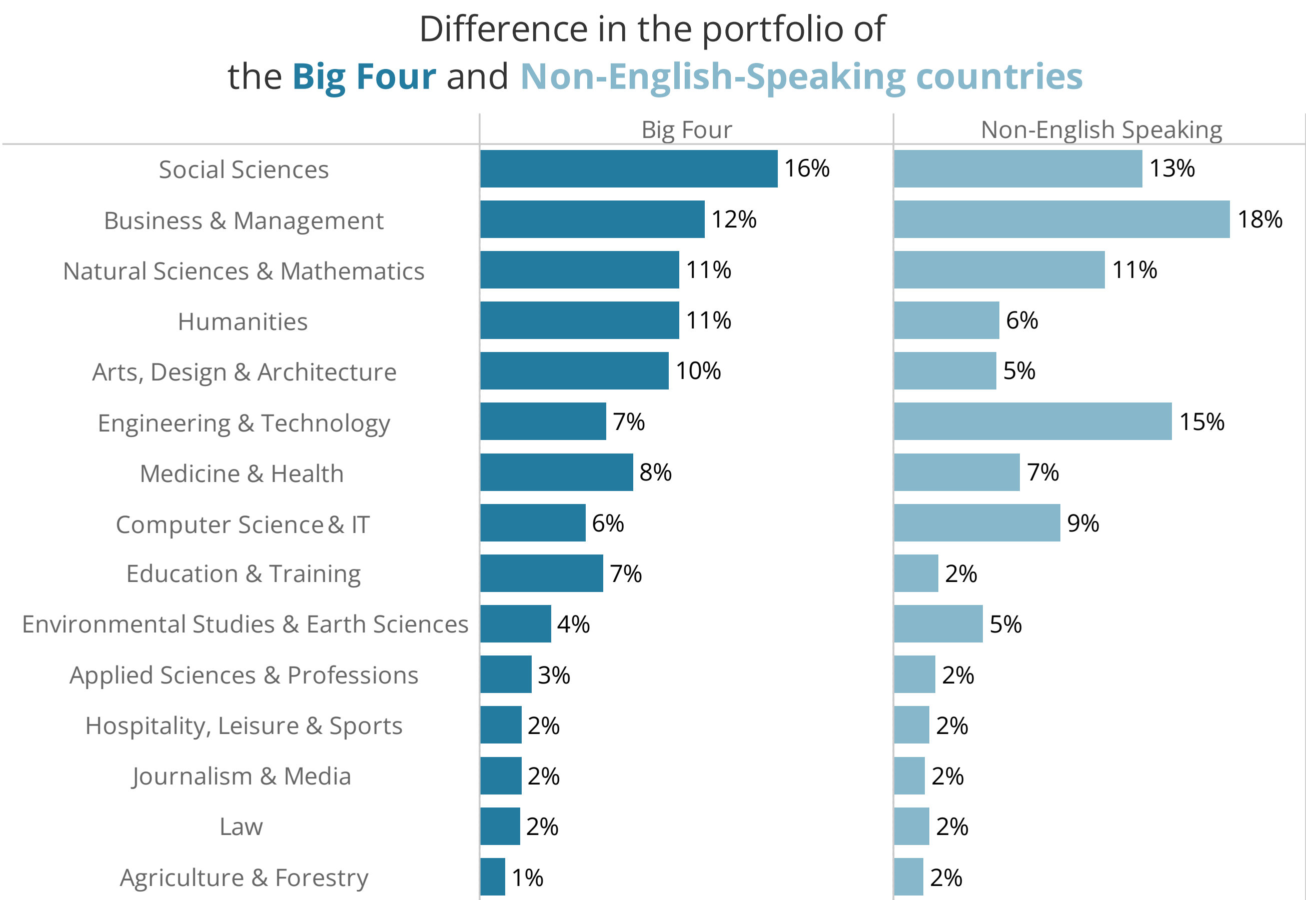
As shown in the figure below, on-campus ETPs outside anglophone destinations continue to largely be offered in relation to the field of Business & Management, as well as Engineering & Technology, Social Sciences, Natural Sciences, and Computer Science.

Disciplines across borders

It is not surprising that the split of on-campus ETPs across discipline fields in the Big Four countries is diverse and covers all available subjects. In non-anglophone countries, however, deciding which programme will be delivered in English is often the outcome of a calculated effort.

The share of programmes associated with Education & Training, Humanities, the Arts, and Law is lower in non-English speaking countries. This may be due to the importance of delivering such programmes in the domestic language. On the other hand, approximately 57% of all on-campus ETPs fall under increasingly internationalised fields, primarily Business & Management, Engineering & Technology, Social Sciences, and Natural Sciences & Mathematics. Meanwhile, the share of programmes supplied by institutions in the Big Four sums up to 46%.

Figure 11: Share of programmes per discipline



Instead of focusing on differences, Studyportals tried to summarise what disciplines are most represented in the ETP landscape in non-anglophone regions by placing disciplines into four categories:

1. **Main disciplines** are disciplines that make up the bulk of on-campus ETPs in non-English-speaking countries such as Business & Management, Engineering & Technology, Social Sciences, and Natural Sciences.

2. **Staple disciplines** form a part of nearly every country's on-campus ETP offer but are less common than programmes in the main disciplines. These include Computer Science & IT, Medicine & Health, and the Humanities. As displayed in Figure 12, these are particularly pronounced in the MENA, SSA, and South Asian regions. Conversely, the share from EHEA institutions is the lowest, likely attributed due to the region's limited supply of on-campus Medicine & Health programmes.

3. **Market specific disciplines** constitute a group of mostly non-scientific disciplines whose weight varies region by region. These are disciplines that are normally offered in key anglophone countries but are not present in non-English speaking regions. The relatively higher share of programmes attached to these disciplines makes regions like SSA and the Americas more similar to the Big Four study destinations than to their EHEA peers.

4. Finally, **marginal disciplines** contain on-campus ETPs that focus on domain-specific knowledge and are not usually associated with most offers in any specific market. Such disciplines are valuable as they cater to a niche of important, qualified professionals, but are rarely widespread across English-taught offers. In this case, SSA stands out as an outlier with a slightly higher share of programmes associated with Agriculture, Applied Sciences, and Law compared to other regions.

Table 9: Discipline distribution by region

	Discipline	Non-English Speaking	Big Four	World
Main	Business & Management	17%	12%	13%
	Engineering & Technology	14%	7%	8%
	Natural Sciences & Mathematics	11%	11%	11%
	Social Sciences	13%	16%	15%
	Total	**55%**	**45%**	**47%**
Staple	Computer Science & IT	8%	6%	6%
	Humanities	6%	11%	9%
	Medicine & Health	8%	8%	8%
	Total	**22%**	**24%**	**24%**
Market Specific	Arts, Design & Architecture	6%	10%	9%
	Education & Training	3%	7%	6%
	Environmental Studies & Earth Sciences	5%	4%	4%
	Total	**13%**	**20%**	**19%**
Marginal	Agriculture & Forestry	2%	1%	1%
	Applied Sciences & Professions	2%	3%	3%
	Hospitality, Leisure & Sports	2%	2%	2%
	Journalism & Media	2%	2%	2%
	Law	2%	2%	2%
	Total	**10%**	**11%**	**10%**

Business & Management and Engineering & Technology programmes are more prevalent in non-anglophone countries compared to their representation in the Big Four. This trend has led to a higher overall proportion of programmes associated with main discipline areas.

From the non-English speaking countries, it appears that the Chinese region is the most polarised as most of its ETPs fall under the main disciplines of Business & Management, Engineering & Technology, Social Sciences, and Natural Sciences & Mathematics.

On the other hand, while the MENA region seems to also prioritise programmes tied to the main disciplines, it has the highest share of programmes tied to staple disciplines like Medicine, Computer Science, and the Humanities, making it slightly more distinct from other regions.

It is worth noting that Computer Science & IT related programmes are likely to grow given the recent interest for topics related to AI and machine learning, alongside the growing need for digital skills across the globe. This is an important point seeing as Computer Science & IT already has a greater share in non-English speaking countries in 2024 compared to the Big Four study destinations.

In relation to this, green jobs are also a growing theme, where institutions may seek to broaden their focus on sustainable careers. This can be done by fusing skills from conventional disciplines like Business, Architecture, and Engineering with specialised areas such as Environmental Studies, Ecology Sustainable Development, Sustainable Energy, Resource Management, among others.

Overall, institutional portfolios remain quite diverse across most regions, emphasising the need to consider how each market plays a role in the on-campus ETPs on offer.

Figure 12: Discipline distribution by market

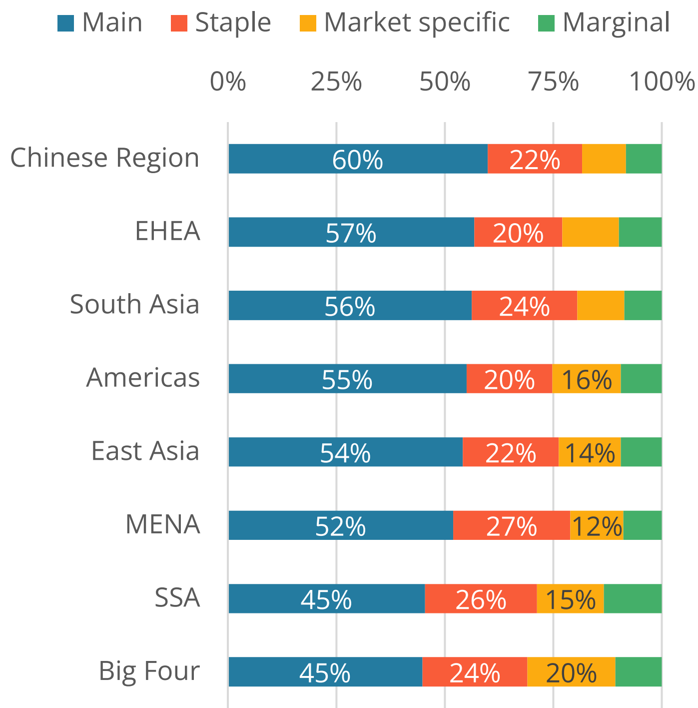


Table 10: Discipline distribution by region

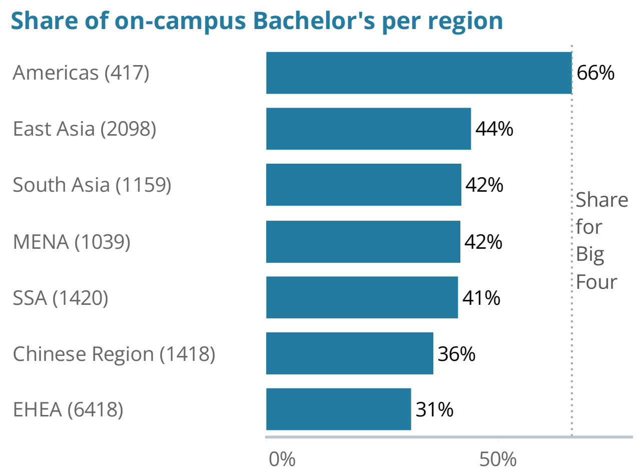
	Discipline	Chinese Region	EHEA	South Asia	Americas	East Asia	MENA	SSA	Non-English Speaking countries	Big Four	World
Main	Business & Management	18%	19%	10%	19%	17%	14%	13%	17%	12%	13%
	Engineering & Technology	21%	13%	17%	6%	15%	16%	8%	14%	7%	8%
	Natural Sciences & Mathematics	11%	10%	17%	12%	11%	12%	12%	11%	11%	11%
	Social Sciences	10%	15%	12%	18%	11%	10%	13%	13%	16%	15%
	Total	**60%**	**57%**	**56%**	**55%**	**54%**	**52%**	**45%**	**55%**	**45%**	**47%**
Staple	Computer Science & IT	8%	9%	9%	5%	8%	9%	5%	8%	6%	6%
	Humanities	5%	6%	7%	10%	5%	6%	8%	6%	11%	9%
	Medicine & Health	9%	5%	8%	5%	9%	12%	14%	8%	8%	8%
	Total	**22%**	**20%**	**24%**	**20%**	**22%**	**27%**	**26%**	**22%**	**24%**	**24%**
Market Specific	Arts, Design & Architecture	5%	6%	5%	4%	6%	5%	5%	6%	10%	9%
	Education & Training	2%	2%	2%	8%	4%	4%	5%	3%	7%	6%
	Environmental Studies & Earth Sciences	4%	5%	4%	4%	4%	4%	6%	5%	4%	4%
	Total	**10%**	**13%**	**11%**	**16%**	**14%**	**12%**	**15%**	**13%**	**20%**	**19%**
Marginal	Agriculture & Forestry	1%	2%	2%	1%	2%	2%	4%	2%	1%	1%
	Applied Sciences & Professions	2%	2%	3%	3%	3%	2%	3%	2%	3%	3%
	Hospitality, Leisure & Sports	2%	2%	1%	2%	2%	1%	2%	2%	2%	2%
	Journalism & Media	2%	2%	1%	1%	2%	1%	1%	2%	2%	2%
	Law	2%	2%	1%	2%	2%	2%	3%	2%	2%	2%
	Total	**8%**	**10%**	**9%**	**9%**	**9%**	**9%**	**13%**	**10%**	**11%**	**10%**

4.7. Level and method

There are many layers to unravel to understand the regional differences in offering ETPs. While we have analysed rankings, institutional size, and portfolio supply on a regional, national, and even city level, Studyportals investigated other dimensions for further insights.

Study levels often correspond to the point when students begin learning a new academic language. Countries that offer English-taught bachelor's pave the way for students to achieve their academic aspirations. Thus, while it would make sense for on-campus bachelor's degrees to outnumber master's, most regions indicate that less than 50% of their programmes are supplied in the former.

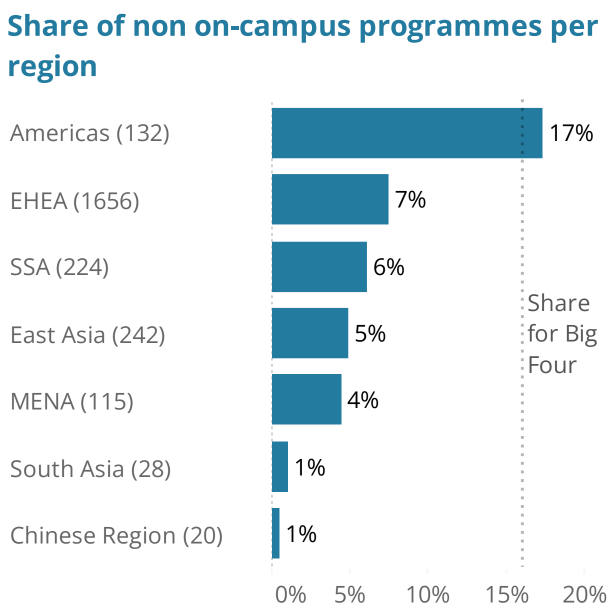
Figure 13: Share of Bachelor's programmes



Meanwhile, the supply of on-campus bachelor's from the Big Four study destinations represents 66% of programmes (dotted line in Figure 13), similar to the Americas. On the other hand, countries in EHEA indicate the lowest share of on-campus bachelor's in relation to master's studies. This may be due to certain countries urging international and domestic students alike to learn in the local language to strengthen national development. As countries push these agendas, like the Netherlands and Denmark, this share could likely change in the future.

In turn, this highlights the numbers of on-campus master's that are offered in each region. Previously, the disparity between both levels was much wider; however, in 2024 the data shows that while there are still more on-campus master's, the difference is not significant. This shows how having more ETPs affects the distribution across the study levels, but also indicates the interest of countries adopting an international mindset.

Figure 14: Share of non on-campus programmes



Given the interplay between international higher education strategies and tackling recent governmental policies restricting international student mobility, the future may see new trends emerge that will continue to affect the supply and demand for on-campus ETPs.

One development is the rise of online education which has expanded students' access to tertiary education. Understandably, this has been a trend in anglophone countries which have a wider means of investing in online options. It has also risen to prominence as part of ongoing discussions surrounding life-long learning and up-skilling an ageing workforce.

While the Americas signify the highest share of online and blended programmes compared to their on-campus offers, EHEA is the region that offers the highest number of non on-campus programmes after the Big Four.

The 2020 pandemic has altered the way online and blended programmes are perceived by institutions. It has brought forward the necessity of offering flexible ways to teaching and adapt to global demand. As more international students see their chances of studying abroad becoming restricted by domestic policies and affordability concerns, online programmes may become an appealing alternative.

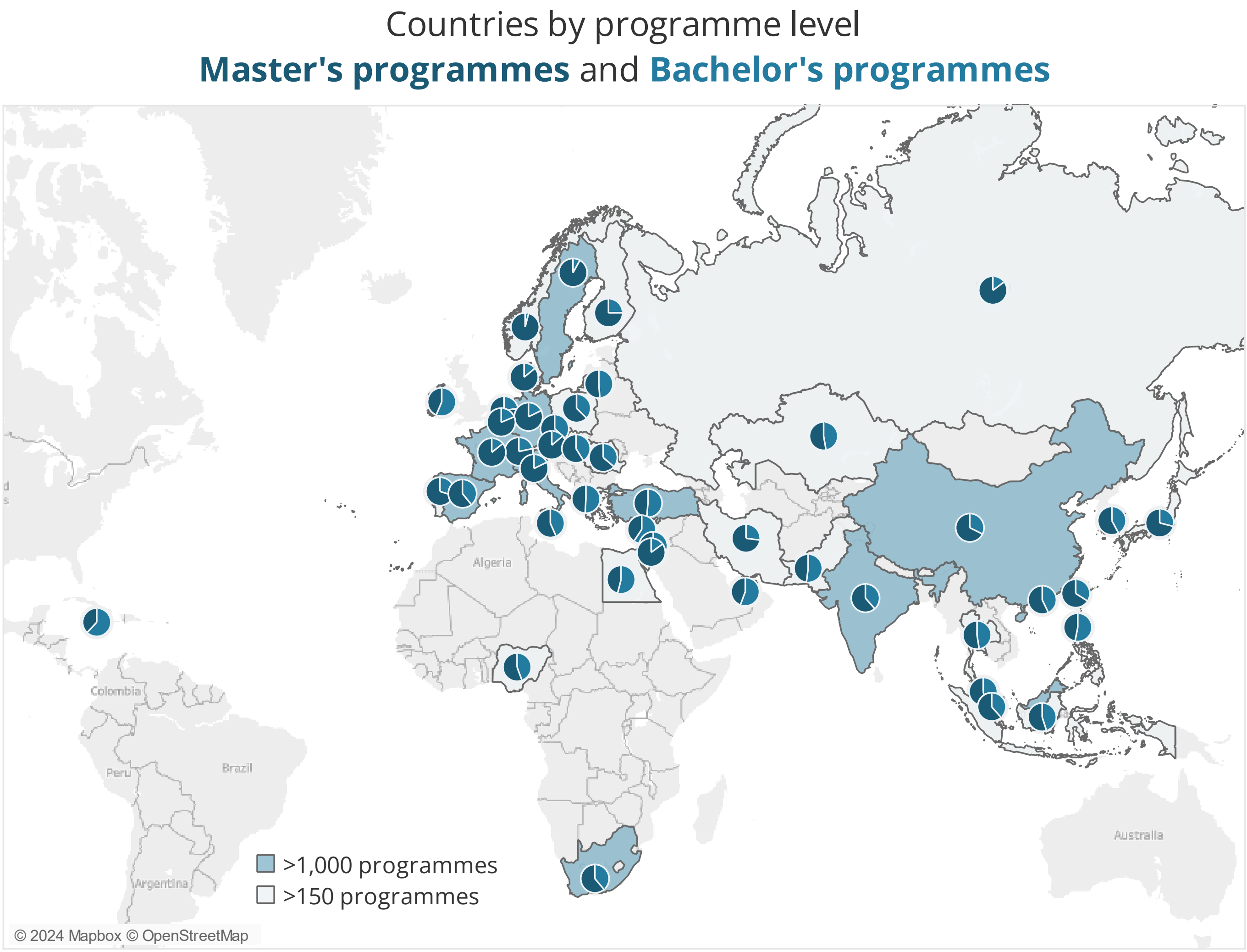
A broader look of the main providers of on-campus ETPs worldwide is visualised in the map below. Aside from the English-speaking countries such as Ireland and South Africa, some of the destinations with the large numbers of ETPs include those in Europe, China, and India.

However, the map suggests a significantly higher concentration of both on-campus master's and bachelor's in Europe compared to other regions, as indicated by the number of circles and their sizes representing the number of institutions offering programmes. This reflects Europe's extensive higher education network and its strong tradition of diverse academic offerings.

Beyond Europe, India and China are educational hotspots, with a high number of institutions providing a large supply of programmes. This shows that these countries are major educational centres in their respective regions, likely attracting a large number of domestic and international students looking to study closer to home.

There is also a notable difference in programme availability across different continents. For instance, Asian countries display a varied range of institutions offering a credible supply of on-campus ETPs, while South America and Africa have fewer institutions supplying programmes. This could be due to various factors including economic development, investment in higher education, and robustness of country’s tertiary education.

Figure 15: Main countries by number of programmes and levels



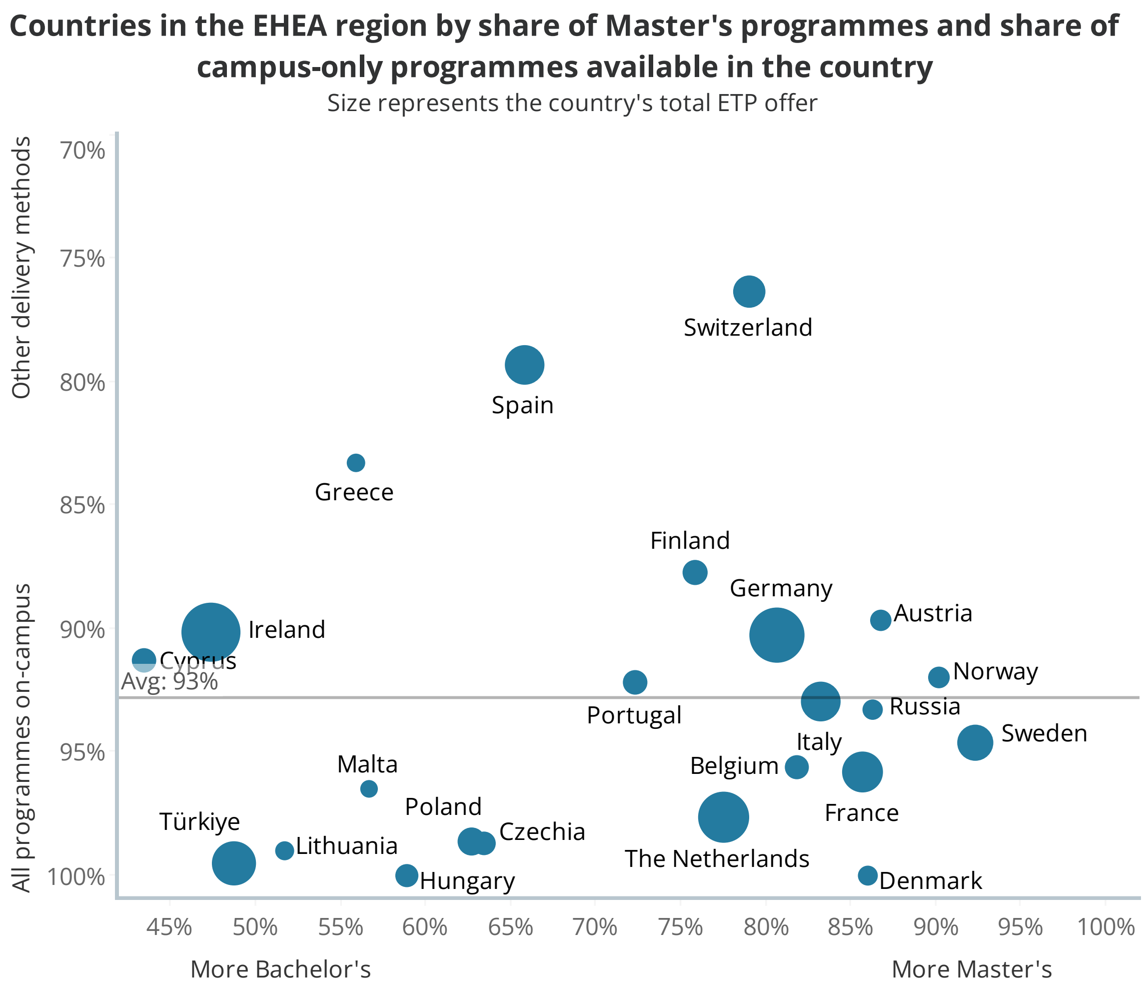
Deep-dive into study levels and method – EHEA region

Since the EHEA region remains the largest hub for on-campus, ETPs beyond the major English-speaking countries, it is important to assess how widely distributed and accessible the region's overall portfolio might be.

As shown in the bubble chart below, internationalisation in the EHEA remains focused on master's programmes, with comparably few English-taught bachelor's offered outside of North and West Europe. It is also a matter of delivery methods: most countries rely firmly on on-campus programmes for their ETP portfolios, with the only countries having a relatively higher share of online, blended, and mixed study methods being Greece, Spain, and Switzerland.

It is good to keep in mind that master's students studying in the EHEA region tend to be more independent, mobile, and globally minded compared to their undergraduate peers. Additionally, the distribution of on-campus English-taught bachelor's is more prevalent in countries such as Ireland, Türkiye, Cyprus, Greece, Poland, Hungary, Lithuania, among others compared to the traditional educational hubs in North and West Europe.

Figure 16: EHEA countries by level and method



4.8. Format overview

Even though online programmes are becoming more attractive to prospective students, a full-time, on-campus, English-taught programme remains to be the most common offer.

Across most regions, on-campus offers dominate, with particularly high percentages in the Chinese Region (87%), South Asia (97%), and MENA (87%). Meanwhile, this share is relatively low for the Big Four study destinations, but exceptionally low in the Americas.

On-campus delivery is also available in part-time format, with the availability of multiple formats being a common option globally but is absent from South Asia and very limited in the EHEA region.

Furthermore, part-time, non on-campus study options are more common in the Big Four and the Americas, where between 15%-16% of programmes are offered in an online or blended part-time format. The availability of these programmes in the Big Four and the Americas might cater to a demographic that balances education with other commitments like employment, suggesting more flexible educational frameworks.

Overall, Studyportals data shows that institutions have generally remained close to the core of their value proposition: providing prospective students with a residential learning experience that provides a mixture of quality education, social opportunities, and both personal and career development. This can also be seen as multiple regions offer little to no full-time online programmes.

This leads us to two considerations regarding why institutions in certain regions may have limited online offerings: firstly, establishing online programmes requires significant investment in infrastructure and expertise, along with ongoing management, which can be challenging for institutions based in developing countries.

Secondly, ETPs outside the Big Four primarily serve a niche audience that includes both domestic students seeking to expand their educational experiences and internationally mobile students from abroad. For both groups, the opportunities for international mobility and the social aspects of learning are often crucial elements of the programmes they pursue.

Given the recent introduction of domestic policies across various study destinations that negatively impact the flow of international student mobility, there is likely to be a shift in where students choose to study abroad. However, for those students that continue to prioritise high quality programmes from well ranked institutions, such as for Asian students in particular, online programmes are likely to become more popular, yet also more competitive from a recruitment perspective.

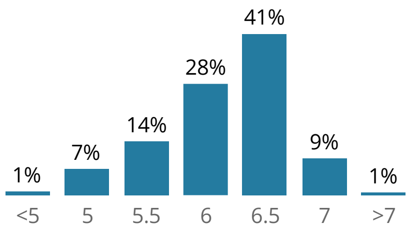
Figure 17: Distribution of ETPs by format and method

		Full-time	Multiple Formats	Part-time	
EHEA	Campus Only	86%	6%	3%	94%
	Multiple Options	1%	1%	0%	2%
	Online Only	0%	0%	3%	4%
East Asia	Campus Only	78%	19%	1%	99%
	Multiple Options	0%	1%	0%	1%
	Online Only		0%	0%	1%
Chinese Region	Campus Only	87%	11%	2%	100%
	Multiple Options	0%	0%	0%	0%
	Online Only		0%	0%	0%
SSA	Campus Only	79%	12%	4%	99%
	Multiple Options	0%	2%		0%
	Online Only	0%	1%	2%	1%
MENA	Campus Only	87%	8%	1%	96%
	Multiple Options	1%	0%	0%	1%
	Online Only	0%		3%	4%
South Asia	Campus Only	97%	1%	1%	84%
	Multiple Options		0%	0%	7%
	Online Only			1%	9%
Americas	Campus Only	59%	22%	2%	86%
	Multiple Options	3%	2%	1%	6%
	Online Only		4%	5%	9%
Big Four	Campus Only	74%	11%	1%	94%
	Multiple Options	1%	4%	0%	3%
	Online Only	1%	1%	7%	3%
		76%	16%	8%	

4.9. English requirements

IELTS requirements for ETPs vary slightly per destination, with a preference by EHEA institutions for higher scores. The split between IELTS scores falls between 6.0 and 6.5, with nearly 70% of on-campus programmes requiring either of these scores.

Figure 18: Distribution of IELTS requirements per region



	<5	5	5.5	6	6.5	7	>7
EHEA	0%	3%	14%	23%	49%	10%	1%
East Asia	7%	25%	20%	30%	16%	2%	1%
SSA				38%	34%	28%	
Chinese Region	2%	3%	16%	51%	26%	2%	1%
MENA	0%	19%	20%	22%	36%	3%	
South Asia		19%	7%	9%	65%	1%	
Americas			7%	5%	81%	6%	

Figure 19 indicates the supply of on-campus programmes according to discipline area and study level, with the size of each bubble representing the supply of programmes offered. This figure shows that while the analysis by discipline and study level confirms the observed split in score, there are also variations in the score requirements for different study levels. Two key observations are:

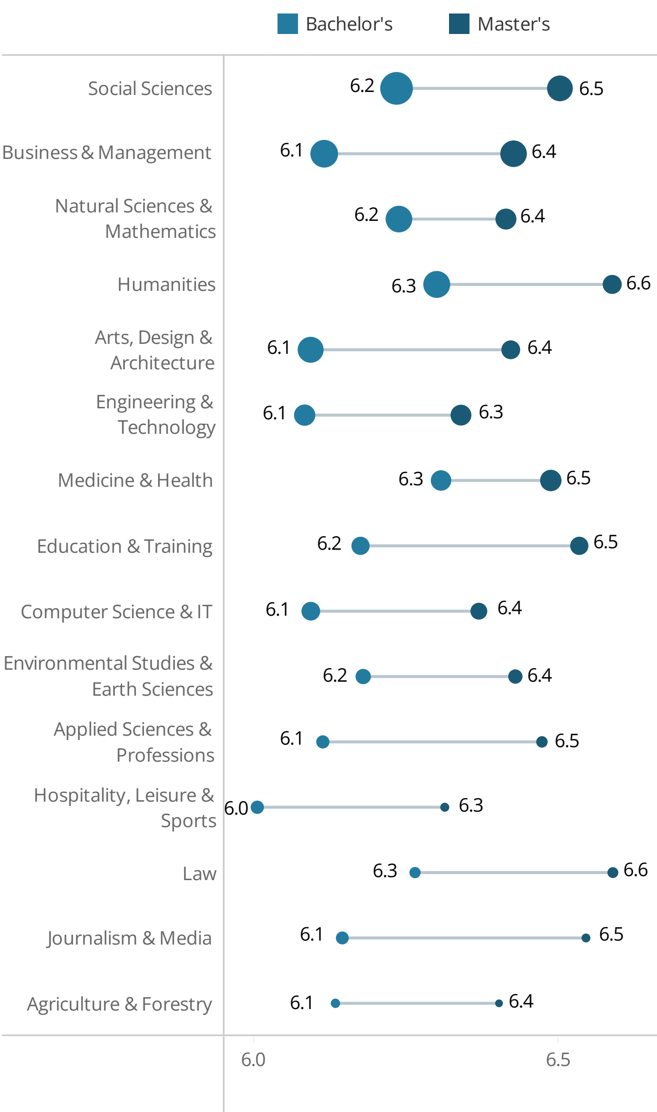
- Subjects that are more theoretical typically have higher IELTS score requirements compared to practical, technical fields which tend to have lower language pre-requisites.
- Although on-campus bachelor's ask for lower IELTS scores compared to master's programmes, the differences in average scores across disciplines are generally subtle.

Since the scores do not vary greatly, there is more flexibility for the institutions to choose whether to be on the high end of the entry requirements (6.4 – 6.6) or to be more inclusive by asking for lower scores (6.0 – 6.3).

It is also worth noting that scores of less than 6.0 are not as prevalent as previously thought. This could be due to the extra support that would otherwise be needed by the students to improve their English proficiency via on-campus services once their studies begin.

This in turn highlights a notable change in higher IELTS requirement scores for on-campus master's. This slight shift may be attributed to more HEIs expecting students to have a better command of the English language when looking to specialise at a post-graduate level.

Figure 19: Distribution of IELTS requirements by discipline, study level, and programme supply



5. Conclusion

5.1. Overview of global trends

Although Studyportals identifies more than 183,000 on-campus English-taught programmes (ETPs) at a bachelor's and master's level, 78% of these programmes are offered by the Big Four study destinations (the UK, the US, Australia, and Canada). The supply of such programmes globally grew by 22% since 2021 and increased by 41% from suppliers outside the Big Four. This largely benefits on-campus programmes associated with STEM fields alongside the Humanities and Education.

In connection to this, approximately 57% of all on-campus ETPs fall under increasingly internationalised fields, primarily Business & Management, Engineering & Technology, Social Sciences, and Natural Sciences & Mathematics.

5.2. Regional supply

While the EHEA region remains the largest supplier of on-campus ETPs, there is a credible rise in programmes supplied from all other regions such as East Asia, SSA, South Asia, and MENA. Only the Americas does not seem to prioritise internationalised, on-campus offerings.

Following the global pandemic, countries outside the Big Four begin to supply more on-campus bachelor's and master's programmes, which stabilise by early 2023 and are projected to remain at a stable supply in the future. Moreover, Studyportals data notes an uptick in PhD programmes worth monitoring in the short-term.

5.3. Institutional quality and rankings

The 2024 World University Rankings by Times Higher Education highlights significant regional variations. In the Americas, although 83% of institutions are unranked, 73% of programmes in the region come from ranked institutions, suggesting a disparity in educational quality. In contrast, MENA and SSA exceed some developed regions in the proportion of ranked institutions, likely due to targeted efforts in the education sector.

The availability of on-campus ETPs impacts institutional rankings differently across countries. Nations like Ireland, Hong Kong, and the Netherlands link extensive ETP portfolios with high rankings, suggesting a positive correlation between robust programme offerings and institutional prestige.

5.4. Higher education hubs

Similar to 2021, most cities outside of the Big Four that host 10 or more institutions are located in the EHEA, such as Paris, Berlin, Barcelona, Milan, and Vienna. Beyond this, other cities that also have 10 or more institutions include Dubai, Beijing, Shanghai, Taipei, and Bangkok.

However, although there are 28 cities worldwide that each host over 10 institutions, with a combined total of more than 21,000 on-campus programmes, there are also more than 1,750 cities with fewer than 10 institutions, yet these smaller cities together offer nearly 160,000 programmes. This insight signals that these cities, albeit hosting fewer institutions, should not be overlooked, especially with regard to assessing the competitive landscape in recruiting international students.

5.5. Focus on emerging fields

Business & Management and Engineering & Technology programmes are more prevalent in non-anglophone countries than in the Big Four, highlighting regional strengths in these disciplines. The Chinese region focuses heavily on these fields along with Social Sciences and Natural Sciences & Mathematics, while the MENA region uniquely supplies more on-campus programmes in Medicine, Computer Science, and Humanities.

5.6. Adaptable formats

Online education reshapes access to tertiary education, highlighted by its significant uptake in the Americas and the EHEA. The pandemic accelerates this trend, making online programmes a viable alternative for international students facing mobility and financial barriers. Meanwhile, the Big Four and the Americas are more prone to offering part-time, flexible study options that are well-aligned with the needs of prospective students who self-finance, highlighting a trend towards adaptable educational environments.

5.7. English proficiency requirements

IELTS requirements for on-campus programmes typically range between 6.0 and 6.5, with subtle variations influenced by study level (bachelor's vs. master's) and discipline (theory-based vs. practice-based). In particular, EHEA institutions tend to prefer higher scores, reflecting a focus on English proficiency, especially for more theory-based or master's programmes.

6. Appendix

Table 11: On-campus ETPs in 2019-2024

Destination	ISO Code	Jan 2019	Mar 2024
South Africa	ZA	1,833	2,772
Ireland	IE	2,314	2,595
Germany	DE	1,906	2,269
China	CN	750	2,296
Malaysia	MY	973	2,397
The Netherlands	NL	1,946	2,104
New Zealand	NZ	1,150	2,128
Türkiye	TR	1,035	1,602
France	FR	1,020	1,323
Spain	ES	1,157	1,027
India	IN	363	1,610
Italy	IT	831	1,212
Sweden	SE	933	1,019
Hong Kong	HK	689	1,116
Poland	PL	515	642
Pakistan	PK	214	913
Switzerland	CH	592	658
United Arab Emirates	AE	304	719
South Korea	KR	326	489
Japan	JP	246	554
Cyprus	CY	485	450
Finland	FI	485	457
Iran	IR	46	651
Norway	NO	500	355
Jamaica	JM	233	499
Denmark	DK	492	328
Portugal	PT	385	459
Taiwan	TW	281	432
Belgium	BE	399	457
Czechia	CZ	255	453
Hungary	HU	368	440
Thailand	TH	184	467
Austria	AT	380	338
Russia	RU	285	319
Lithuania	LT	329	295
Greece	GR	277	234
Singapore	SG	121	278
Philippines	PH	227	224
Israel	IL	145	181
Malta	MT	18	247
Romania	RO	106	152
Palestine	PS	146	217
Kazakhstan	KZ	38	180
Kenya	KE	195	57
Saudi Arabia	SA	99	150
Egypt	EG	111	163
Slovakia	SK	69	122
Latvia	LV	124	141
Indonesia	ID	14	171
Nigeria	NG	15	160
Bulgaria	BG	130	84
Sri Lanka	LK	47	141
Uganda	UG	31	145
Jordan	JO	1	148
Ukraine	UA	5	139
Namibia	NA	120	114
Lebanon	LB	26	115
Macao	MO	36	100
Qatar	QA	88	77
Iceland	IS	57	85
Slovenia	SI	100	31
Vietnam	VN	8	105
Estonia	EE	83	72
Ghana	GH	1	80
Croatia	HR	42	66
Luxembourg	LU	44	64
Ethiopia	ET	2	69
Azerbaijan	AZ	20	44
Bangladesh	BD	30	60
Colombia	CO	59	-
Mauritius	MU	55	15
Brunei	BN	-	51
Oman	OM	36	38
Georgia	GE	34	28
Guam	GU	29	38
Belize	BZ	31	25
North Macedonia	MK	38	19
Cameroon	CM	37	-
Nepal	NP	-	34
Grenada	GD	23	12
Belarus	BY	-	30
Trinidad and Tobago	TT	27	17
U.S. Virgin Islands	VI	13	26
Mexico	MX	5	24
Bahrain	BH	24	20
Serbia	RS	9	13
Kyrgyzstan	KG	12	16
Northern Cyprus	XC	14	18
Monaco	MC	11	7
Bosnia and Herzegovina	BA	7	13
Albania	AL	14	11
Curaçao	CW	13	2
Brazil	BR	13	2

Rwanda	RW	11	3
Gibraltar	GI	3	11
Cayman Islands	KY	9	8
Zambia	ZM	-	10
Armenia	AM	10	10
Sint Maarten	SX	2	7
Guyana	GY	6	3
Aruba	AW	7	5
Antigua and Barbuda	AG	5	1
Afghanistan	AF	5	-
Liechtenstein	LI	3	3
Costa Rica	CR	3	-
Bhutan	BT	3	1
Barbados	BB	3	-
Samoa	WS	2	-
Peru	PE	2	-
Maldives	MV	2	-
Dominica	DM	2	-
Botswana	BW	-	2
Tanzania	TZ	-	1
Solomon Islands	SB	1	-
Montserrat	MS	1	-
Fiji	FJ	1	-
American Samoa	AS	1	1

** Our dataset reflects both the natural increase in global programme supply and Studyportals' commercial objectives to identify and catalogue ETPs. Notable surges in programme supply in some study destinations often result from a combination of the country's efforts to enhance its competitiveness in higher education and Studyportals' data collection initiatives. Despite these apparent spikes, the global share of supply from individual countries remains relatively small and does not significantly impact the findings of this report.*

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The British Council is the UK's international organisation for cultural relations and educational opportunities. We build connections, understanding and trust between people in the UK and other countries through arts and culture, education and the English language. Last year we reached over 67 million people directly and 745 million people overall including online, and through broadcasts and publications. Founded in 1934 we are a UK charity governed by Royal Charter and a UK public body. We receive a 15 per cent core funding grant from the UK government.

About IELTS

IELTS - the International English Language Testing System - is the world's most popular English language test for work, study and migration. Jointly owned by the British Council, IDP: IELTS and Cambridge University Press & Assessment, IELTS is trusted by more than 12,500 organisations around the world as a reliable indicator of true-to-life ability to communicate in English.

Delivered on either computer or paper, IELTS assesses a test taker's English language proficiency across four skills: listening, reading, writing, and speaking.

With a focus on human conversations, IELTS was a pioneer of four-skills English language testing more than 35 years ago and continues to set the standard for English language testing today.

BRITISH COUNCIL IELTS™

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