



**Market Snapshot data for**

Japan



# Big-4 destinations - students from Japan

## Study visas issued by destination

Australia: issued in 12 months to Dec-25

**0.77K**

Previous yr: 0.74K (+0.0K +4.1%)

Australia: issued in 3 months to Dec-25

**0.23K**

Previous yr: 0.17K (+0.1K +36.3%)

Canada: issued in 12 months to Nov-25

**5.34K**

Previous yr: 6.40K (-1.1K -16.5%)

Canada: issued in 3 months to Nov-25

**1.33K**

Previous yr: 1.28K (+0.1K +3.9%)

UK: issued in 12 months to Sep-25

**2.18K**

Previous yr: 2.32K (-0.1K -6.4%)

UK: issued in 3 months to Sep-25

**1.57K**

Previous yr: 1.60K (-0.0K -1.3%)

USA: issued in 12 months to May-25

**8.09K**

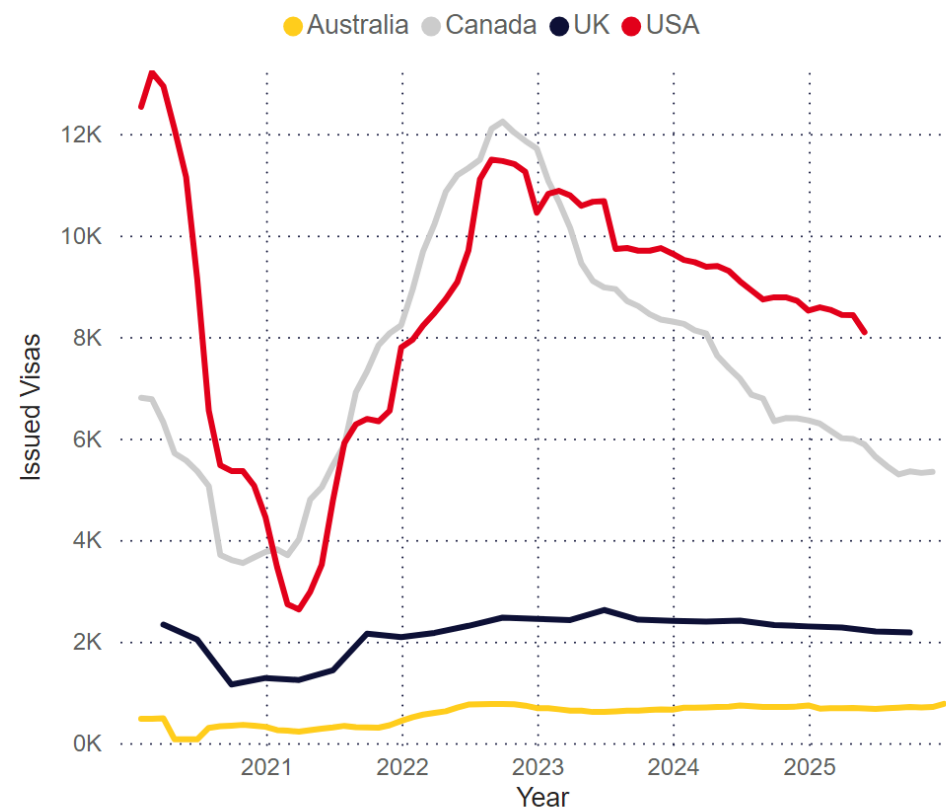
Previous yr: 9.30K (-1.2K -13%)

USA: issued in 3 months to May-25

**1.21K**

Previous yr: 1.65K (-0.4K -26.7%)

## Total visas issued in a rolling 12 month period by destination



**Source:** Government visa data from big 4 destinations. \*Study Visas included:

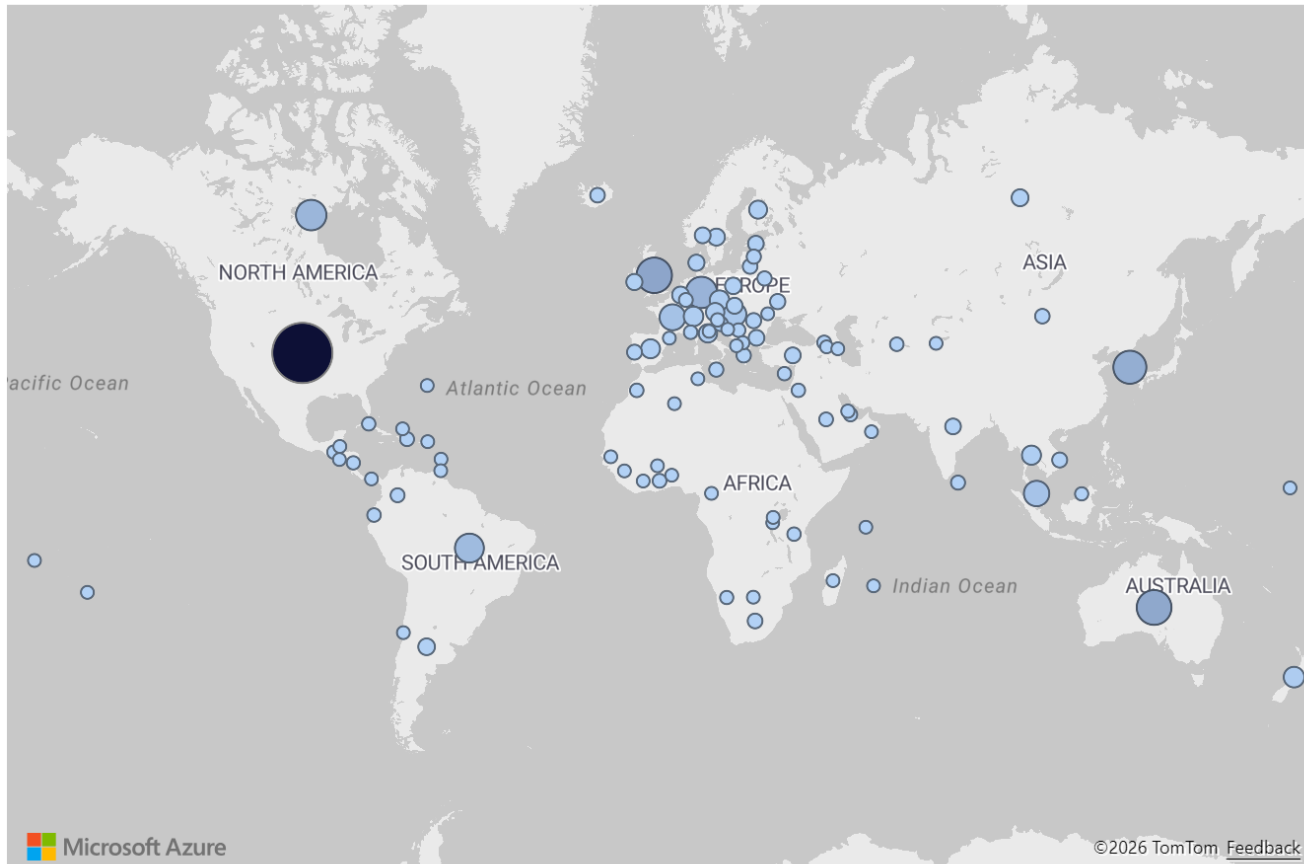
- **Australia** - Visas for HE provision. For individuals outside AU only.
- **Canada** - Study permits (issued across tertiary system, large volumes are vocational).
- **UK** - Sponsored HE student volumes (excluding dependents).
- **USA** - F1 study visas (can be used for any form of education).

Further data on issued student visas for the Big-4 destinations is available in the [Student Mobility Dashboard](#)

# Study destinations - students from Japan

Average students 2022 & 2023 by destination  
(includes big 4)

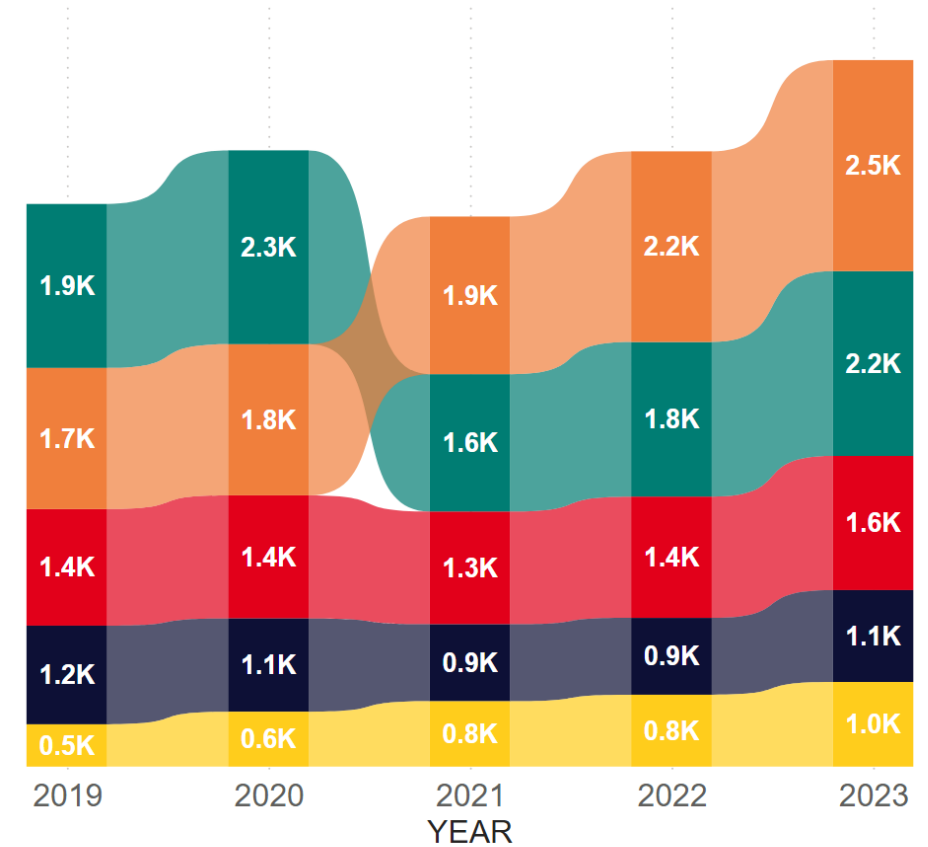
*Note: Average used as data is missing for some years*



Source: UNESCO data

Trends for top 5 destinations\* outside of Big-4

● Brazil ● France ● Germany ● Malaysia ● Republic of Korea



\*Top 5 based on average number of inbound students in 2022 & 2023

# Inbound students to Japan

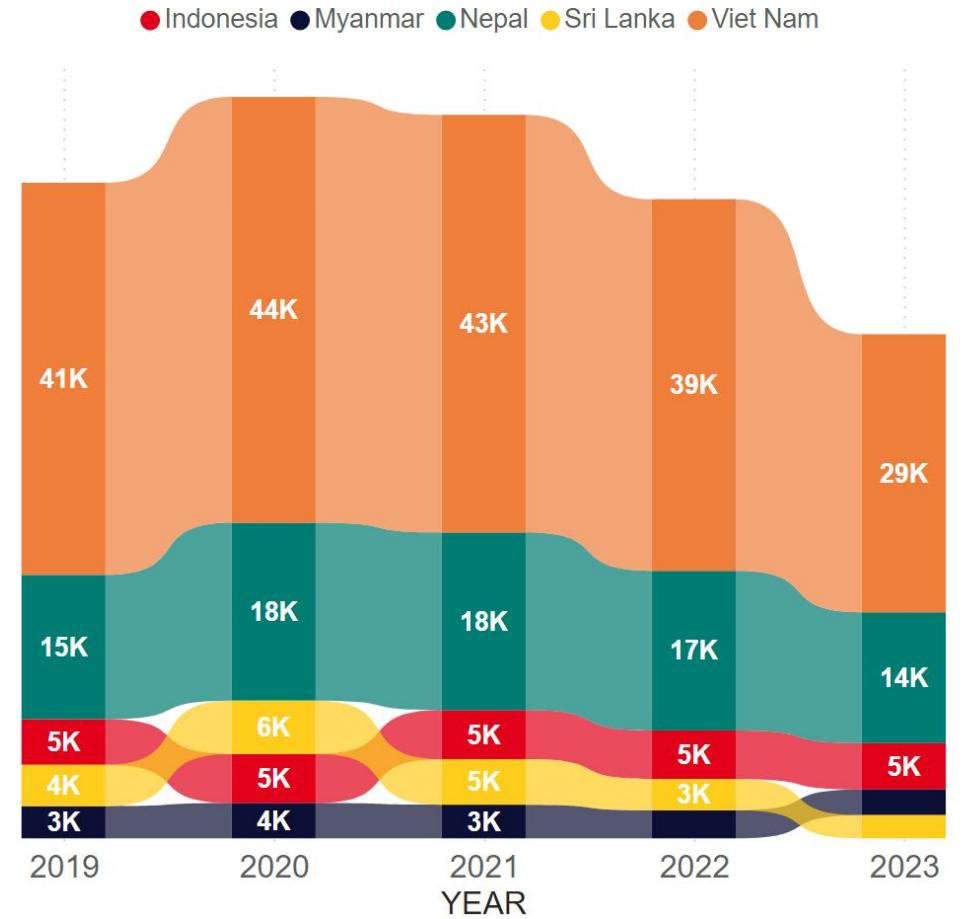
## Source Markets 2022 & 2023

*Note: Average used as data is missing for some years*



Source: UNESCO data

## Trends for top 5 source markets

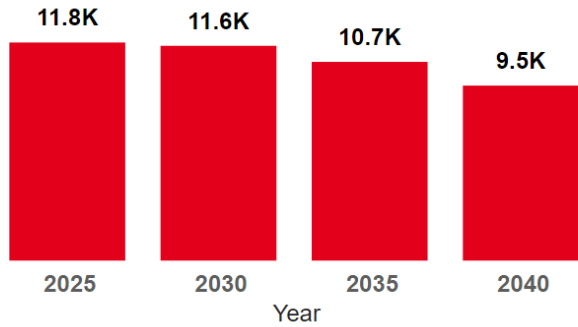


*\*Top 5 based on average number of inbound students in 2022 & 2023*

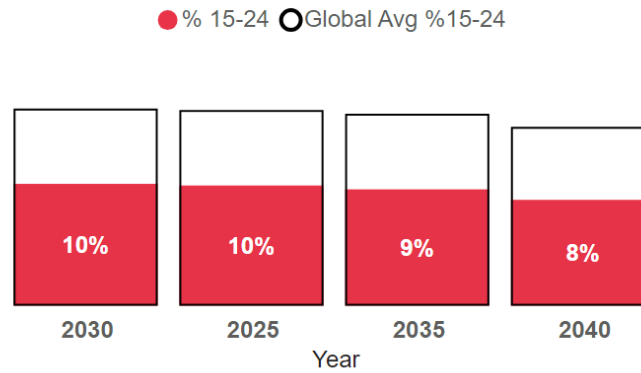
# Growth indicator trends - Japan

## Youth Population & Birth Rate

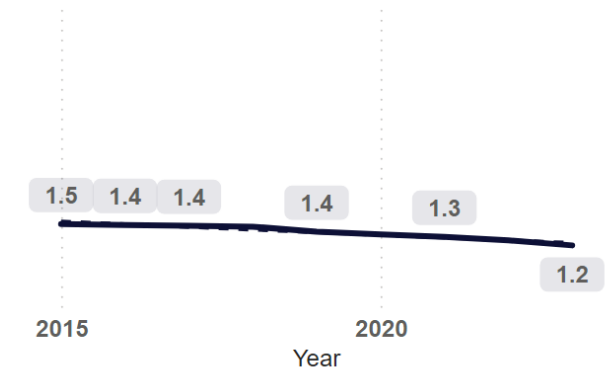
Projected population aged 15-24 by Year (thousands)



Projected proportion of population aged 15-24

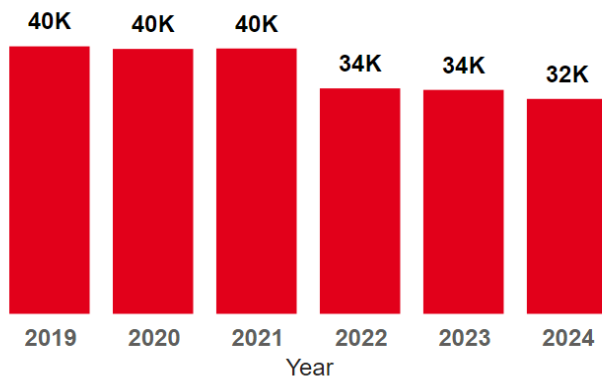


Fertility Rate (births per women)

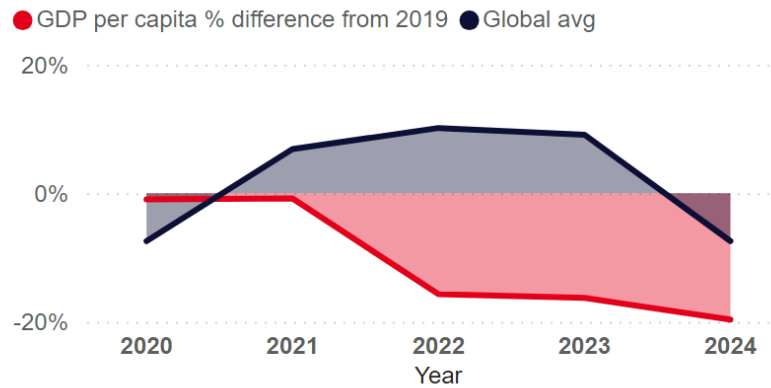


## GDP & Political Stability

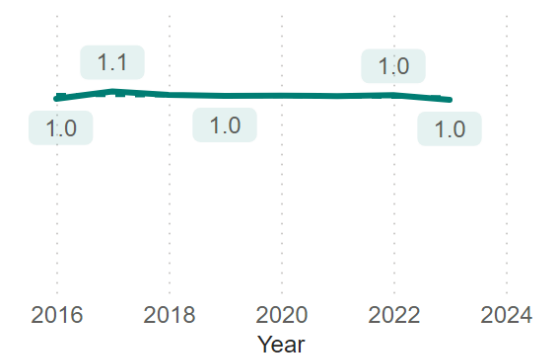
GDP per capita (current US\$)



Change in GDP per capita from 2019



Political Stability and Absence of Violence/Terrorism\*

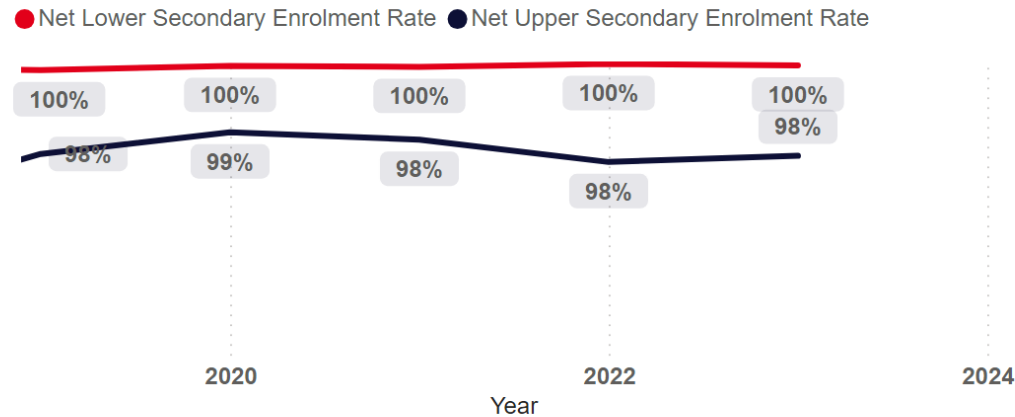


\* Measures perceptions of the likelihood of political instability and/or politically-motivated violence, including terrorism. Estimate gives the country's score on the aggregate indicator, in units of a standard normal distribution, i.e. ranging from approximately -2.5 to 2.5.

# Other growth indicators - Japan

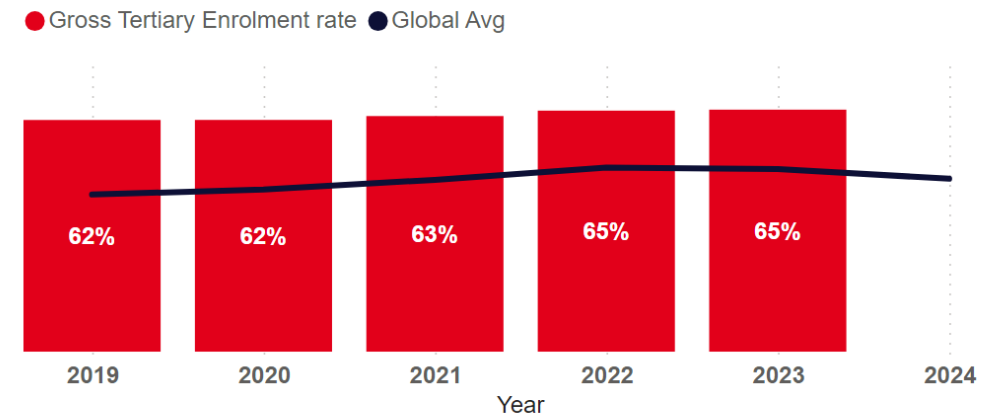
## Education enrolment rates

### Secondary enrolment rates



Source: UNESCO

### Tertiary enrolment rate



## English

English is a primary, de jure or de facto language?	Avg Overall Academic IELTS Score	Avg Total TOEFL Score
No	5.9	72

**Source: IELTS**  
IELTS is an English proficiency assessment in a scale of 1-9. Universities often set a requirement of 6-7. Overall score is an average of score for Listening, Reading, Writing and Speaking.

**Source: TOEFL**  
TOEFL test measures English proficiency. Score out of 30 for Reading, Listening, Speaking and Writing, giving a max score of 120. A score of 80-100 is often considered good for mid tier universities.

## QS Ranked universities

Number of universities in 2026 rankings	Change in number ranked since 2021
47	-1
Universities ranked in the top 100	Universities ranked in top 200
4	10

Source: QS Global Rankings

# Popular subjects - students from **Japan**

*Note: there will be differences in the way destinations code subject areas*

## Undergraduate - top 3 subject areas

UK	Approx % new enrolments
Business and management	20%
Social sciences	18%
Design, and creative and performing arts	13%

AU	Approx % new enrolments
Society and Culture	41%
Management and Commerce	16%
Natural and Physical Sciences	13%

US	Approx % Students
Business and Management	25%
Social Sciences and History	18%
Fine and Applied Arts	11%

## Master's - top 3 subject areas

UK	Approx % new enrolments
Social sciences	27%
Business and management	23%
Design, and creative and performing arts	8%

AU	Approx % new enrolments
Management and Commerce	30%
Society and Culture	24%
Information Technology	20%

US	Approx % Students
Business and Management	32%
Legal Studies and Law Enforcement	23%
Social Sciences and History	15%

**UK Source:** HESA student record 24/25 @JISC 02/02/26

**AU Source:** Austrade commencements 2024

**US Source:** US department homeland security 2024 estimate

Further data on UK subjects is in the [UK Subjects dashboard](#)

Further data on AU subjects is in the [AU Summary dashboard](#)

Further data on US subjects is in the [US Market Sizing Tool dashboard](#)

# Where they study - students from **Japan**

Approximate split of new students by ranking and study level

## UK - % new student enrolments by QS Rank

QS Ranking	Master's	Undergraduate	Total
100 or less	50%	42%	47%
101-500	28%	22%	26%
500+ & unranked	22%	36%	27%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### by Level



## AU - % new student enrolments by if Go8

Go8	Master's	Undergraduate	Total
Group of Eight	46%	73%	61%
Rest of Australia	54%	27%	39%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### by Level



## US - % new student enrolments by US News Ranking

US News Ranking	Master's	Undergraduate	Total
100 or less	74%	29%	47%
101-200	7%	22%	16%
200+	19%	49%	37%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### by Level



UK Source: HESA student record 24/25 @JISC 02/02/26

AU Source: Austrade commencements 2025 (to May)

US Source: US department homeland security 2024 estimate

Further details are in the [UK Institution Performance Dashboard](#)

Further details are in the [AU Summary dashboard](#)

Further details are in the [US enrolment trends dashboard](#)

# Latest trends by study level - students from **Japan**

## YoY change by study level (\*Note US data only available to Academic Year 2023/24)

### UK: YoY change in issued visas

Year ending September 2025

Study Level	Visas Issued	YoY change	% YoY change
1. Pre-sessional English	82	10	14%
2. Below Bachelors	225	-34	-13%
3. Bachelors	1,039	10	1%
4. Masters	758	-118	-13%

further UK visa data by level of study is in the [Student Mobility Dashboard](#)

### AU: YoY Change in New Student Enrolments

Year Ending May 2025

Study Level	New Student Enrolments	YoY change	% YoY change
1. Foundation	63	-1	-2%
2. Diploma	103	-1	-1%
3. Undergraduate	198	-3	-1%
4. Master's	181	15	9%

### US: YoY Change in International Students

Academic Year 2023/24

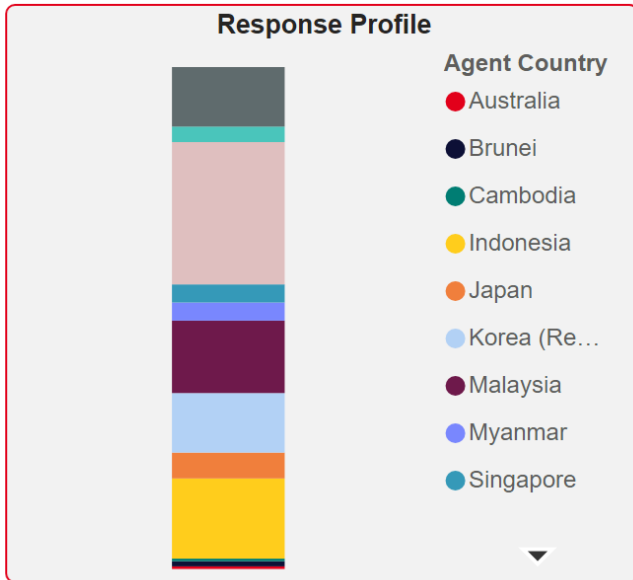
Study level	International students	YoY change	% YoY change
1. Non-Degree	3,156	-770	-20%
2. Undergraduate	6,453	-738	-10%
3. Graduate	2,888	-628	-18%
4. OPT	1,462	41	3%

**UK Source:** Government Visa Data - Sponsored HE student volumes (excluding dependents) to March 2025

**AU Source:** Austrade data to May 2025

**US Source:** Open Doors data to academic year 2023/24

# 2025 Agent Survey - East Asia



Agents were asked if they expected to send more or fewer students (charts below show the % of agents that responded saying slightly or significantly more)

## By Destination

Destination	% more
South Asia	75%
South East Asia	64%
East Asia	54%
Australia	54%
United States	52%
United Kingdom	50%
Europe (non-UK)	46%
New Zealand	39%
Canada	36%
Middle East & Africa	0%

## By Study Level

Study type	% more
Postgraduate/ Masters	62%
Undergraduate/ Bachelors	59%
Pathways	44%
K-12/ International Schools	22%
English Language	16%
Doctorate/ PhD	7%

Agents were asked what they thought were the reasons for growing demand outside of the big 4 destinations and in alternative provision (they could select up to 3 options)\*

Reasons for growing demand	% of respondents
Lower cost of tuition fees	71%
Lower cost of living	55%
Better employment prospects	34%
Growing education quality in more destinations	29%
Lower entry requirements	21%

Agents were asked what their biggest challenges are at this time (they could select up to 3 options)\*

Current challenges	% of respondents
Economic climate / affordability	59%
Increasing competition for students by other recruiters	47%
Immigration policies of destination countries	43%
Increasingly complex range of study abroad options	31%
Access to visa appointments/ visa rejections	26%

\*shows top 5 answers selected