



Online Education Sample Snapshot

India | Philippines | Malaysia

May, 2026



About this report

This snapshot is one of the first Voyage products to integrate search insights alongside our established social listening capability. Search data reveals what prospective students are actively seeking, the questions they take to Google when intent is forming. Social data reveals what they are worried about, debating, and recommending to each other in unfiltered peer conversation.

Read together, the two surface where demand is moving and where trust is holding it back. Search volumes draw on 24 months of data across 149 queries; social analysis focuses on Q4 2025 – Q1 2026 subreddit conversation in each market.

Methodology

Social data is collected through an automated keyword-search string, segmented with a large language model, and analysed with human insight. To focus on student-driven conversation and reduce service-provider voice, analysis draws on subreddit data from each source market. Queries are built off automated, keyword-based rules for which 100% accuracy cannot be guaranteed.

Search data tracks Google search volumes across source markets in monthly intervals, grouped into segments for analysis. 149 queries were built spanning English, Tagalog, and Malay, 99 generic (provider-country agnostic) and 50 branded (provider-country specific, covering the US, UK, and Australia).

Source Market:

India, the Philippines, Malaysia

Destination Market:

Agnostic (with provider country benchmarking across the US, UK, AU)

Social Data Date Range:

01 October 2025 to 31 March 2026

Search Data Date Range:

April 2024 to March 2026

Executive Summary

Data Overview

India and the Philippines are experiencing surging interest in online education from Q4 2025 onward, while Malaysia is cooling. Generic, provider-agnostic searches dominate overwhelmingly, prospective students are looking for online courses and degrees before they are looking for a country. Within the smaller pool of country-specific searches, Australia is gaining ground in the Philippines (+10% YoY), while US search interest has fallen across all three markets (-7% to -60%). Social conversation corroborates the picture: mentions of foreign institutions are rare, with discussion centring on local providers and global platforms like Coursera.

A common undercurrent of negativity runs across all three markets (net sentiment between -2.56 and -4.39), driven not by dissatisfaction with learning itself but by anxieties around credential recognition and employer perception. For Australian universities, the strategic picture is clear: demand is rising, the US is ceding share, and trust is the differentiator.

India

1,693 Total Mentions

-2.56 Net Sentiment

+194% YoY Google Searches

India accounts for a vast majority of search and social data points captured. Demand is surging, driven by working professionals pursuing online degrees alongside jobs, and students seeking affordable coaching for competitive exams (CAT, JEE). A persistent undercurrent of scepticism about certificate recognition and employer value remains.

The Philippines

673 Total Mentions

-2.63 Net Sentiment

+98% YoY Google Searches

Search nearly doubled YoY. Mid-career upskilling, especially pivots to data analytics and tech, is the dominant motivation. A notable information gap exists around provider legitimacy; students frequently question whether employers will recognise online credentials, signalling an opportunity for reputable international providers.

Malaysia

129 Total Mentions

-4.39 Net Sentiment

-24% YoY Google Searches

Malaysia accounted for only 3% of total search volume across the three markets, and was the only market to show declining search interest. Public universities already offer online degrees widely, and conversation skews toward free, self-directed learning rather than formal programmes. Sentiment is the most negative of the three markets.

Online Education Data Snapshot (Search)

Key Insights

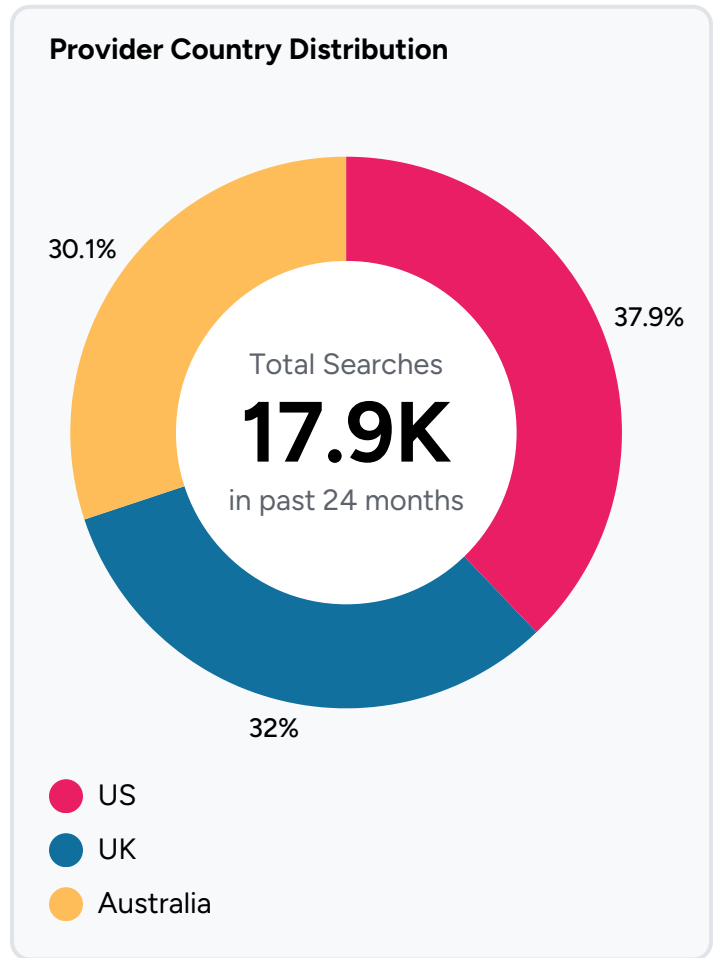
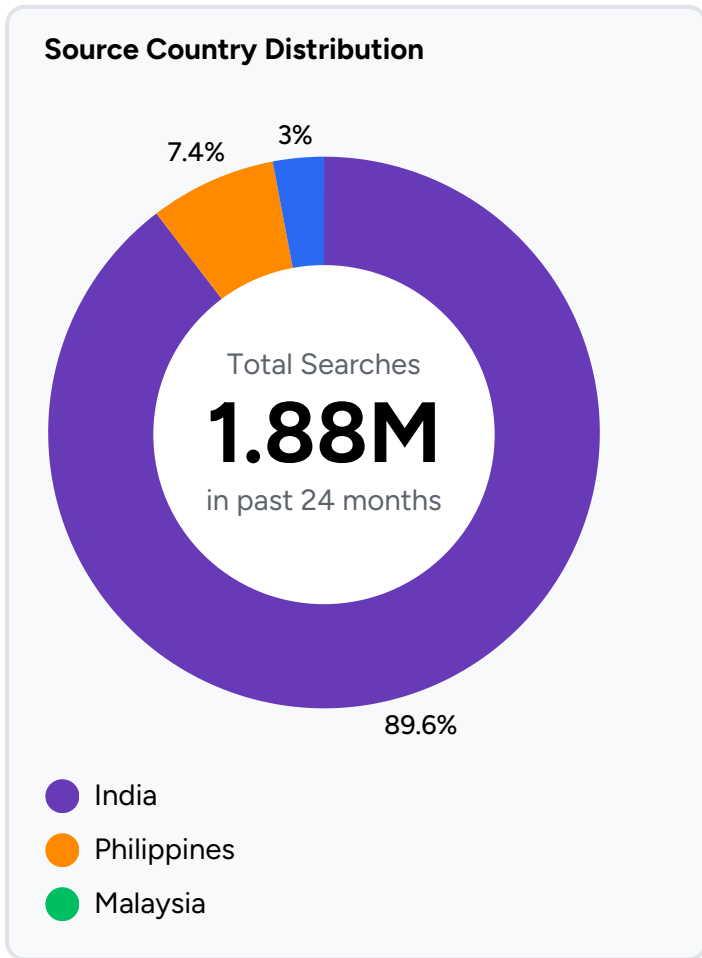
Top 10 Searches by Search Volume

For this research, 149 queries were created pertaining to keywords surrounding online education, spanning English, Tagalog, and Malay. 99 of those queries were “unbranded” or provider country agnostic (e.g. “good online degree”), while 50 were “branded” or provider country specific (e.g. british online courses). The list of provider country queries set up is limited to the U.S, the U.K, and Australia.

Country agnostic queries were significantly higher in search volume by far. Below is the list of top 10 queries by search volume alongside the total volume of searches in the 24-month time period.

Query	Volume
online course	760,000
certified online course	508,390
online degree	317,220
online education	183,750
good online course	45,890
online uni	43,830
online certification	68,00
good online degree	3,890
good online universities	3,790
online unis	2,150
Others (total of remaining 139 queries' volumes)	23,120

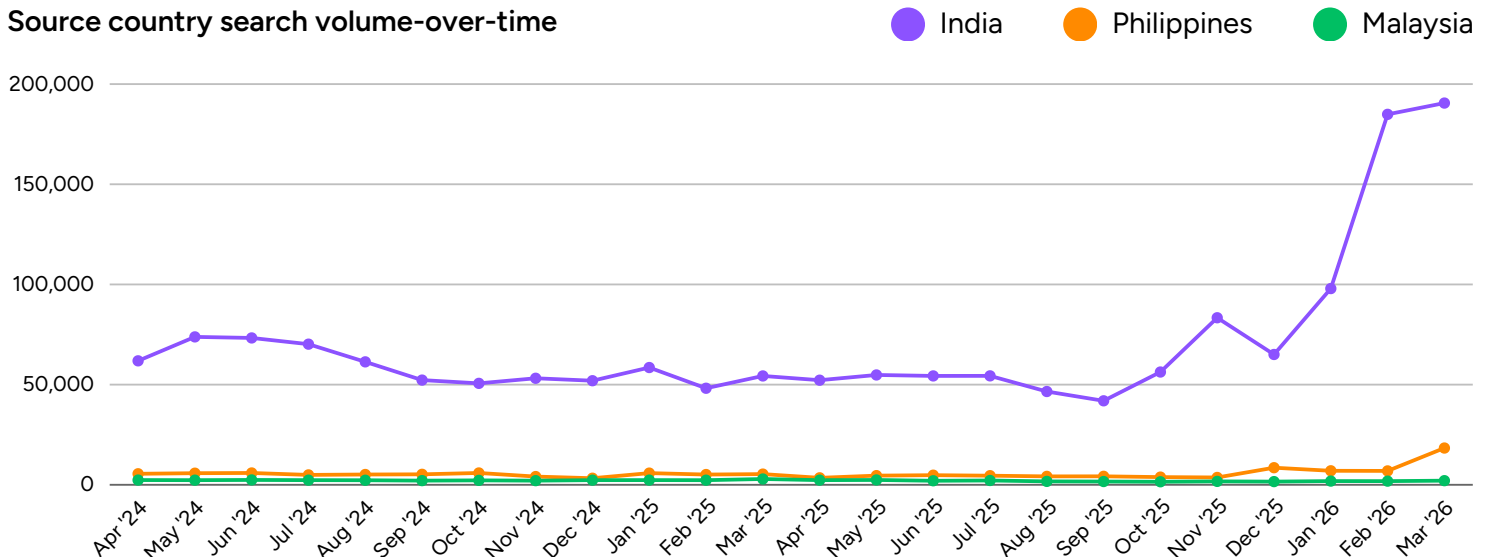
Source & Provider Country Benchmarking



India produced the highest share of search volume amongst the three source countries (89.6%), followed by the Philippines (7.4%) and Malaysia (3%). On provider country-specific queries, the US currently holds the largest historical share at 37.9%, but this reflects accumulated volume across 24 months, the directional trend tells a different story. The UK (32%) and Australia (30.1%) are closing the gap, and as the quarterly comparison overleaf shows, Australia and the UK are gaining momentum in specific source markets while the US is losing share in all three.

Generic (unbranded) online course, degree, university, and education searches

Source country search volume-over-time



Both India and the Philippines saw tremendous increases in search volume for online education that started in Q4 of 2025 and skyrocketed in Q1 of 2026. However, search volume from Malaysia pertaining to online education revealed a picture of overall decline.

This can also be illustrated by benchmarking the search volumes across the three countries of Q1 of 2026 to Q1 of 2025.

Volume of search by country, Q1 2026 vs Q1 2025

Source country	Q1 2026 search volume	% Change vs Q1 2025
India	473,370	+193.9%
The Philippines	32,270	+98.1%
Malaysia	5,740	-23.8%

When a similar benchmarking is performed for the provider countries, we are able to discern the directional trend of demand for each provider country, segmented by source country. Note that for these "branded" queries, only keywords pertaining to the provider countries were used, not specific institutions.

Australia volume of search by source country, Q1 2026 vs Q1 2025

Source country	Q1 2026 search volume	% Change vs Q1 2025
India	240	=
The Philippines	220	+10%
Malaysia	130	-31.6%

The U.K volume of search by source country, Q1 2026 vs Q1 2025

Source country	Q1 2026 search volume	% Change vs Q1 2025
India	410	-4.7%
The Philippines	110	=
Malaysia	120	+22.2%

The U.S volume of search by source country, Q1 2026 vs Q1 2025

Source country	Q1 2026 search volume	% Change vs Q1 2025
India	370	-37.3%
The Philippines	130	-7.1%
Malaysia	60	-60%

The pattern across these tables is consistent: US search share is contracting across all three markets, while Australia and the UK are gaining selectively. For Australian universities, the Philippines emerges as the clearest growth opportunity, with Australia the only major provider country gaining search share in a market that is itself nearly doubling YoY.

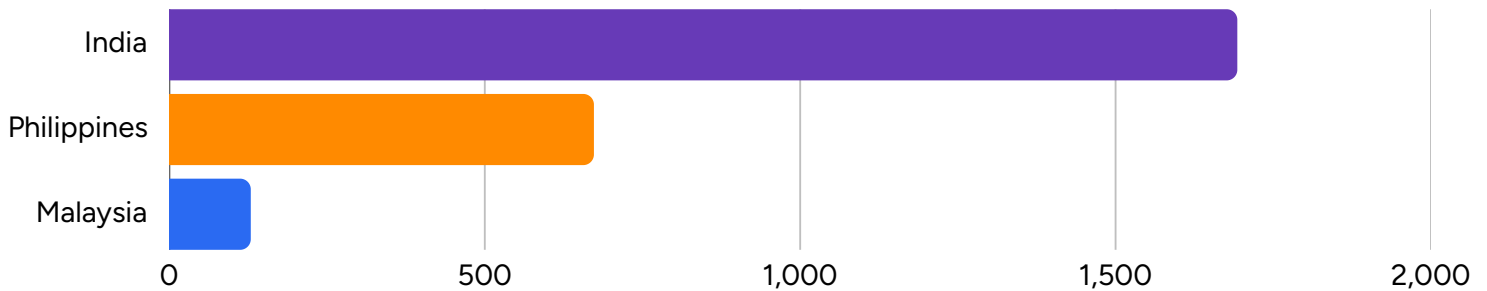
Online Education Data Snapshot (Social)

Key Insights

Subreddit Data Collection

Where the search data tells us what prospective students are seeking, the social data tells us why they hesitate, what they trust, and who they ask. To focus on student-driven conversation and reduce the presence of service-provider voice (common on Instagram and X), this section draws on subreddit data from India, the Philippines, and Malaysia over the 6-month period from 1 October 2025 to 31 March 2026, the same window that produced the search surge analysed in the prior section.

Mentions related to online education in local subreddits, Q4 2025 - Q1 2026 (inclusive)



The distribution of mention volumes mirrors that of search data, with India surfacing the highest volume of mentions followed by the Philippines and Malaysia. Across all three countries, conversation about local providers (e.g. coaches and local universities) or international provider platforms (e.g. Coursera) were dominant.

Indian Subreddits Thematic Analysis

Top Subthemes

- Working Professionals
- Local Exam Prep
- Recognition Concerns

1,693 Total Mentions

-2.56 Net Sentiment

Top Subreddits

- | | |
|----------------------|---------------------------|
| 1) r/Catpreparation | 6) r/JEE |
| 2) r/Indian_Academia | 7) r/Indians_StudyAbroad |
| 3) r/JEENEETards | 8) r/AskIndia |
| 4) r/developersIndia | 9) r/CharteredAccountants |
| 5) r/UPSC | 10) r/India |



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