

Student mobility and motivation:

ASEAN

Inbound and outbound student perceptions

Powered by the QS International Student Survey and Global Student Flows

2026

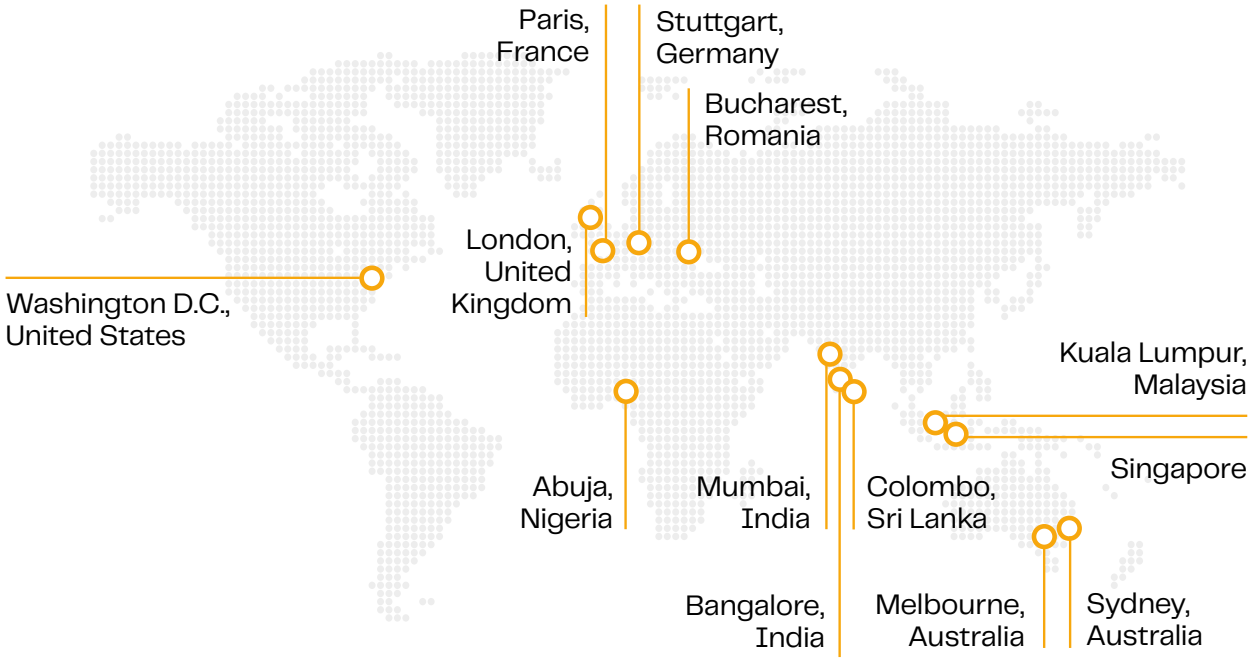
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Foreword



Jeroen Prinsen
Executive Director
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ASEAN is becoming an increasingly important part of the global student mobility landscape. As institutions compete for students in a more complex and competitive environment, understanding not only where demand exists but what drives student decision-making has never been more important.

This report reveals a student population that is becoming more selective, more outcomes-focused and more reliant on trusted sources of information. Students considering ASEAN destinations continue to value affordability, quality teaching and welcoming study environments, but they are also placing greater emphasis on graduate employment prospects, post-study opportunities and recommendations from trusted networks.

Students from ASEAN countries considering study abroad continue to prioritise academic quality and reputation, while increasingly weighing the practical realities of cost, employability and long-term value.

These trends highlight the need for institutions to move beyond broad brand messages and demonstrate tangible outcomes.

By combining student perception data with Global Student Flows insights, this report provides a more complete picture of mobility across the region. It helps institutions understand where demand is evolving, how students make decisions and where recruitment and communication strategies can be strengthened.

In a rapidly changing recruitment environment, institutions need evidence rather than assumptions. The insights in this report are designed to support that process, helping universities engage students more effectively, respond to changing expectations and identify opportunities for sustainable growth.

Turn insights into recruitment results

Find, engage and recruit more of your ideal students

How we can help:

- Make confident market decisions
- Strengthen your recruitment pipeline
- Increase admissions resilience
- Convert interest into enrolments

1,500+
universities worldwide trust us to grow and diversify their student cohorts

14,000+
compliance checks delivered over the past five years

50,000+
students engaged through QS recruitment events

Discover what's possible with QS

Explore our student recruitment solutions

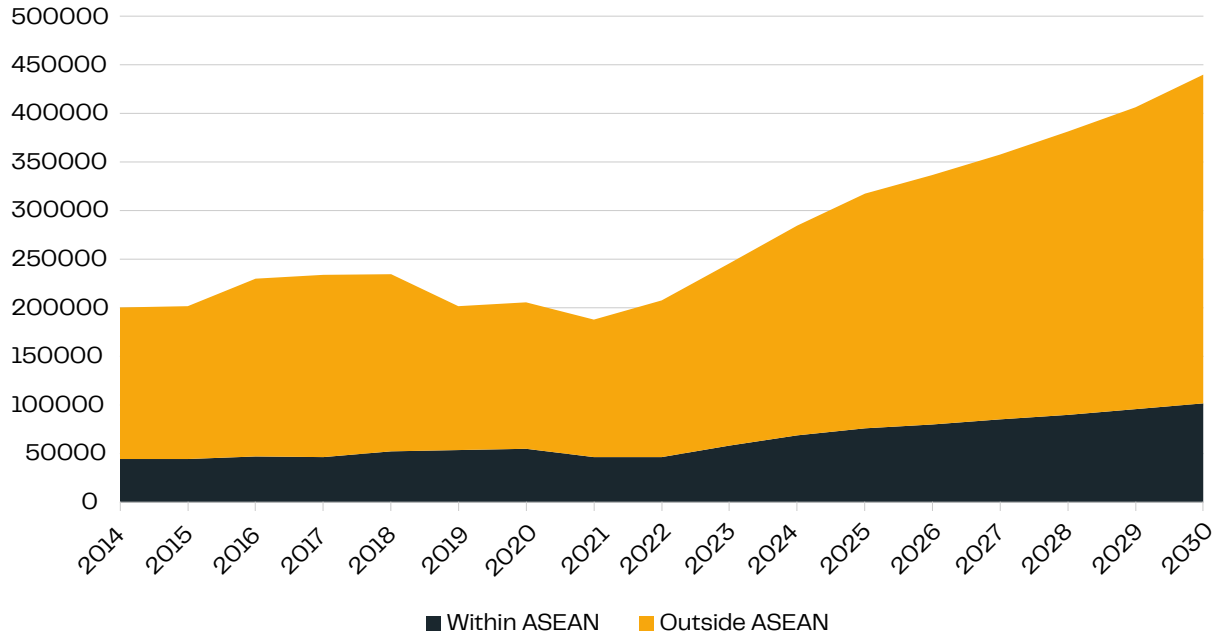
ASEAN: Market overview

Inbound trends

ASEAN is expected to strengthen its position as a major destination for international students over the coming decade. Regional enrolments are projected to exceed 400,000 by 2030, driven by strong growth in Malaysia, Thailand and Singapore.

Student perception data helps explain why demand continues to grow. Students considering ASEAN destinations are attracted by a combination of affordability, quality education and accessibility. However, their priorities are changing. Career outcomes, recommendations and proximity to home are becoming increasingly important considerations.

Figure 1. Inbound International Students to ASEAN



Source: QS Global Student Flows

Outbound mobility trends

Students from ASEAN continue to look overseas in large numbers, but the factors shaping destination choice are evolving. High-quality teaching remains the most important consideration, while destination reputation continues to influence decision-making.

Alongside these traditional drivers, students are placing greater importance on graduate employment prospects, post-study work opportunities and practical considerations such as cost and accessibility. These trends suggest a growing focus on return on investment and long-term career outcomes.

Read more in Global Student Flows

Executive summary

Student mobility within and beyond ASEAN is increasingly shaped by practical considerations rather than aspiration alone. Students are placing greater emphasis on employability, affordability and trusted information sources when deciding where to study.

For students considering ASEAN destinations, welcoming environments, high-quality teaching and affordability remain important. However, graduate employment opportunities, recommendations and proximity to home have become significantly more influential since 2022.

For ASEAN students considering study abroad, teaching quality remains the most important factor. Reputation continues to matter, but students are also looking for evidence that studying abroad will lead to meaningful career outcomes and long-term value.

Subject demand is also shifting. Engineering and Technology has become the leading area of interest among both inbound and outbound audiences in 2026. Agriculture and food-related disciplines have also seen significant growth, while interest in Business and Management has declined across both groups.

Information-seeking behaviour continues to evolve. Official university websites remain the most useful source of information, but reliance on alumni, education agents and personal recommendations is increasing. Institutions therefore need to ensure that their messages are consistent across multiple channels and advocates.

Communication expectations remain high. Students continue to expect rapid responses at every stage of the recruitment process, particularly when making enquiries and evaluating offers. Institutions that combine strong communication with clear evidence of value will be best positioned to compete.



Inbound trends

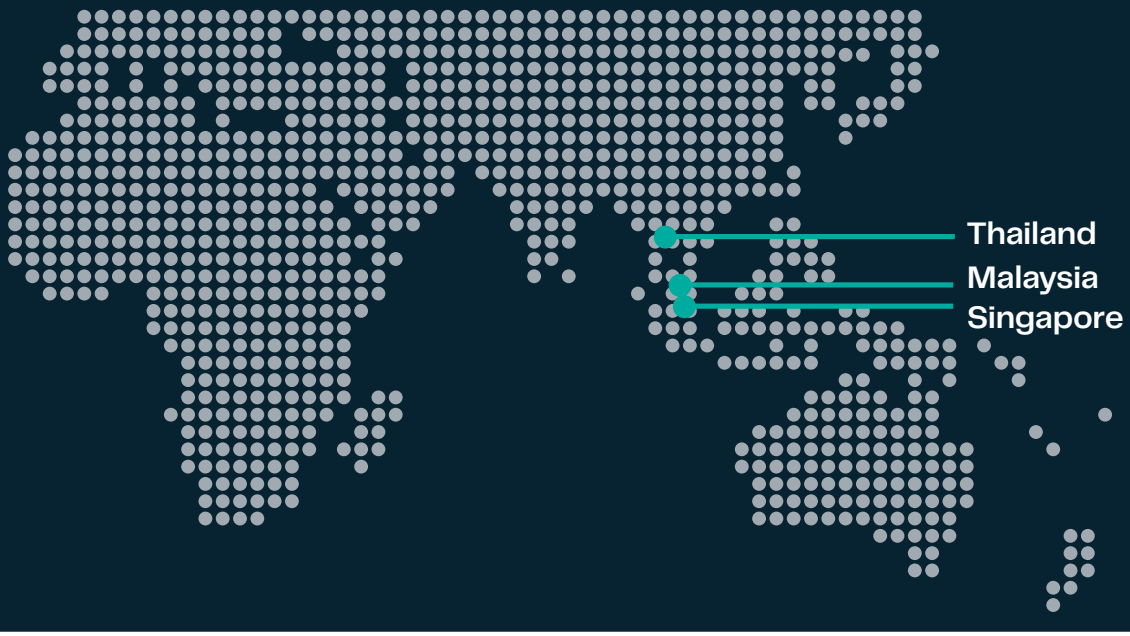
What do ASEAN-bound students want from institutions?



ASEAN inbound trends at a glance

Where are students coming from?

Top growth markets by 2030



What do they want to study?

Top subjects in 2026

#1

Engineering & Technology: 24%

#2 Business & Management: 13%

#3 Agriculture, Food and related studies: 9%

#4 Computing: 9%

#5 Biological & Sport Sciences: 5%

Biggest growth areas since 2022

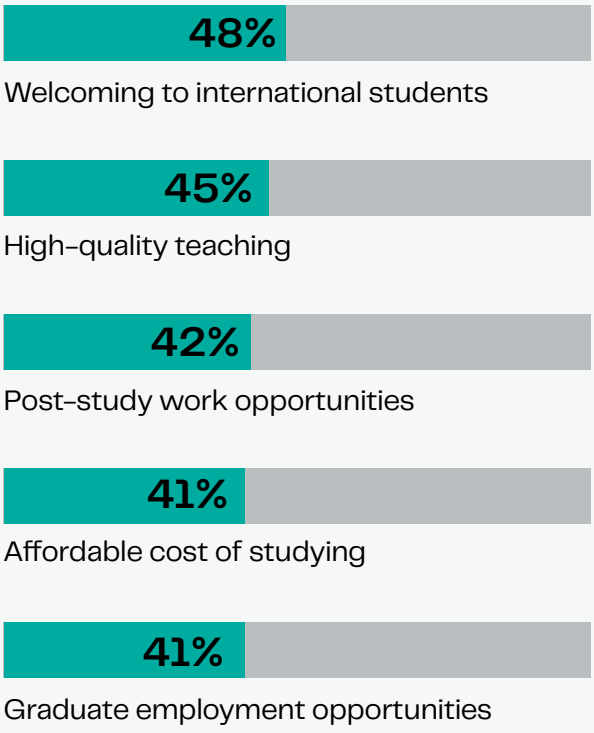
▲ Engineering & Technology +8%

▲ Agriculture, Food and related studies +5%

▼ Business and Management –4%

What do students seeking study in ASEAN want from their chosen country?

Top decision drivers in 2026



Fastest-rising factors since 2022

- Graduate employment opportunities +8%
- Near to home country +8%
- Friends and family in destination +6%
- Recommendations +6%

How quick do students expect responses?

56% expect a complete response to an enquiry within three days or less

44% expect acknowledgement of an application within 24 hours

69% expect an application outcome within one week or less

Most influential information sources

65% Official university website

51% General online search

43% Social media

41% University fairs and information sessions

35% Family and friends

Subject-level interest

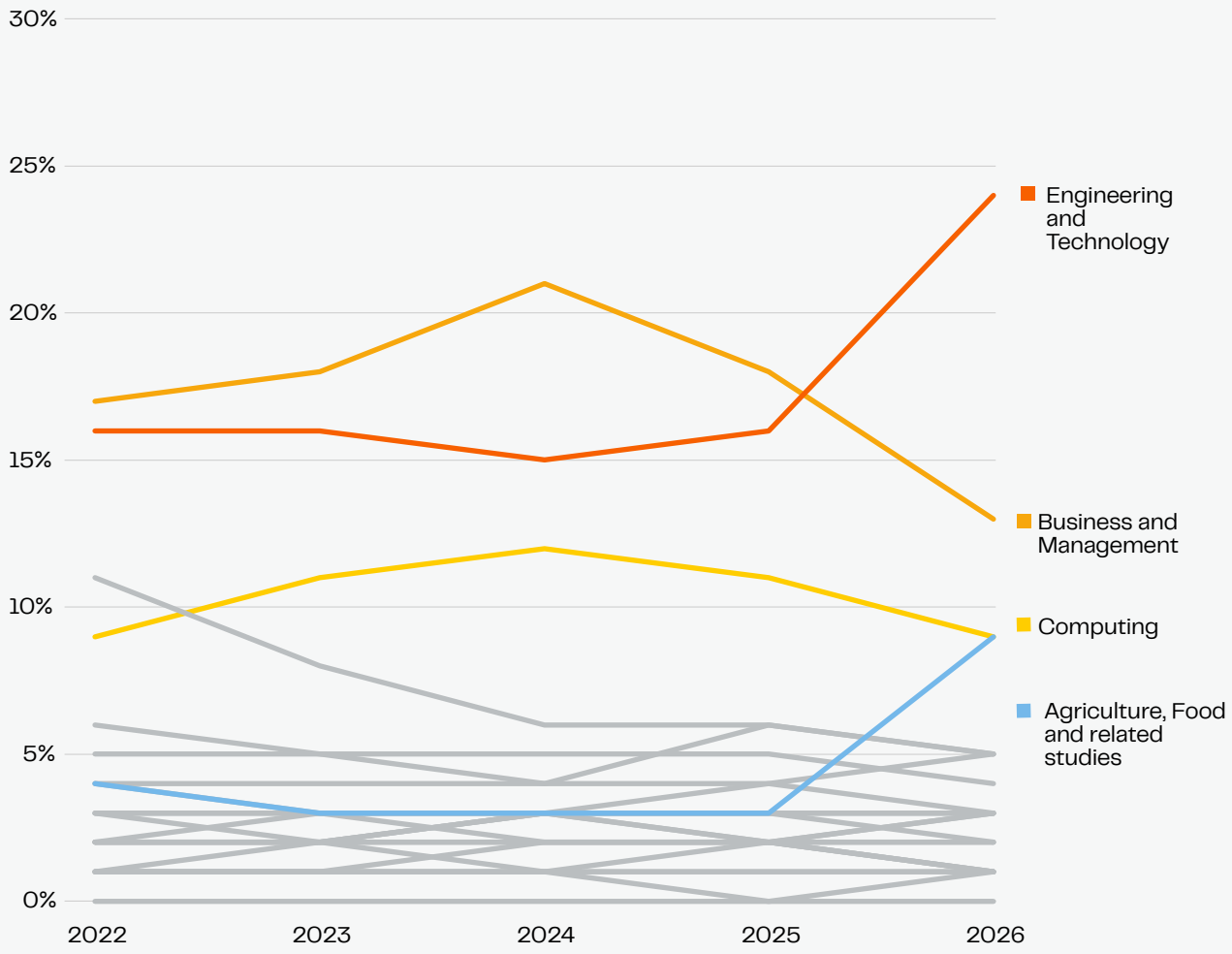
Engineering and Technology has emerged as the leading area of interest among students considering study in ASEAN, accounting for almost a quarter of all responses in 2026. Interest has increased significantly from 16% from 2022–2025, to 24% in 2026.

Agriculture, Food and related studies has recorded one of the strongest increases across the dataset, rising from just 4% in 2022 to 9% in 2026. This may reflect growing awareness of food security, sustainability and agricultural innovation across the region.

Business and Management remains an important area of demand but has declined steadily over time. After peaking at 21% in 2024, interest fell to just 13% in 2026.

Computing continues to attract strong interest, although demand has softened slightly since its peak in 2024. Health-related disciplines have also become less prominent, with Medicine and Dentistry falling from 11% in 2022 to five% in 2026.

Figure 2. ASEAN inbound trends: Subject-level interest



Source: QS International Student Survey

Key questions to consider:

- Does your international recruitment strategy align with growing interest in engineering and agriculture-related disciplines?
- How effectively are you demonstrating career outcomes associated with your programmes?
- Are changes in student demand reflected in your marketing and recruitment priorities?

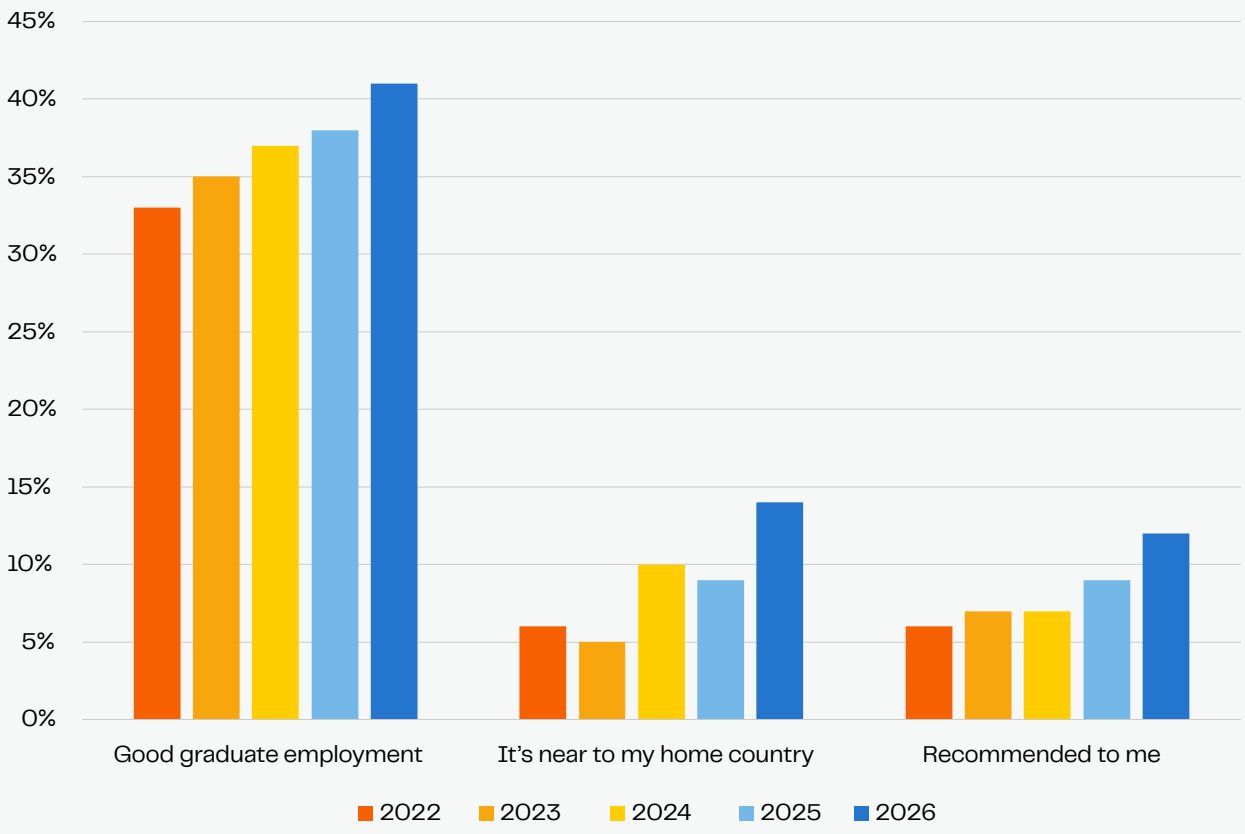
What drives inbound mobility?

A welcoming environment remains the most important factor for students considering ASEAN destinations. Almost half of respondents selected this as one of their most important considerations when choosing where to study.

Teaching quality also remains central to decision-making. Alongside these established drivers, there are clear signs that students are becoming more focused on practical outcomes. Graduate employment opportunities have increased in importance by 8% since 2022.

Proximity is also becoming more influential. Students are increasingly attracted to destinations closer to home, while recommendations from trusted networks have become more important.

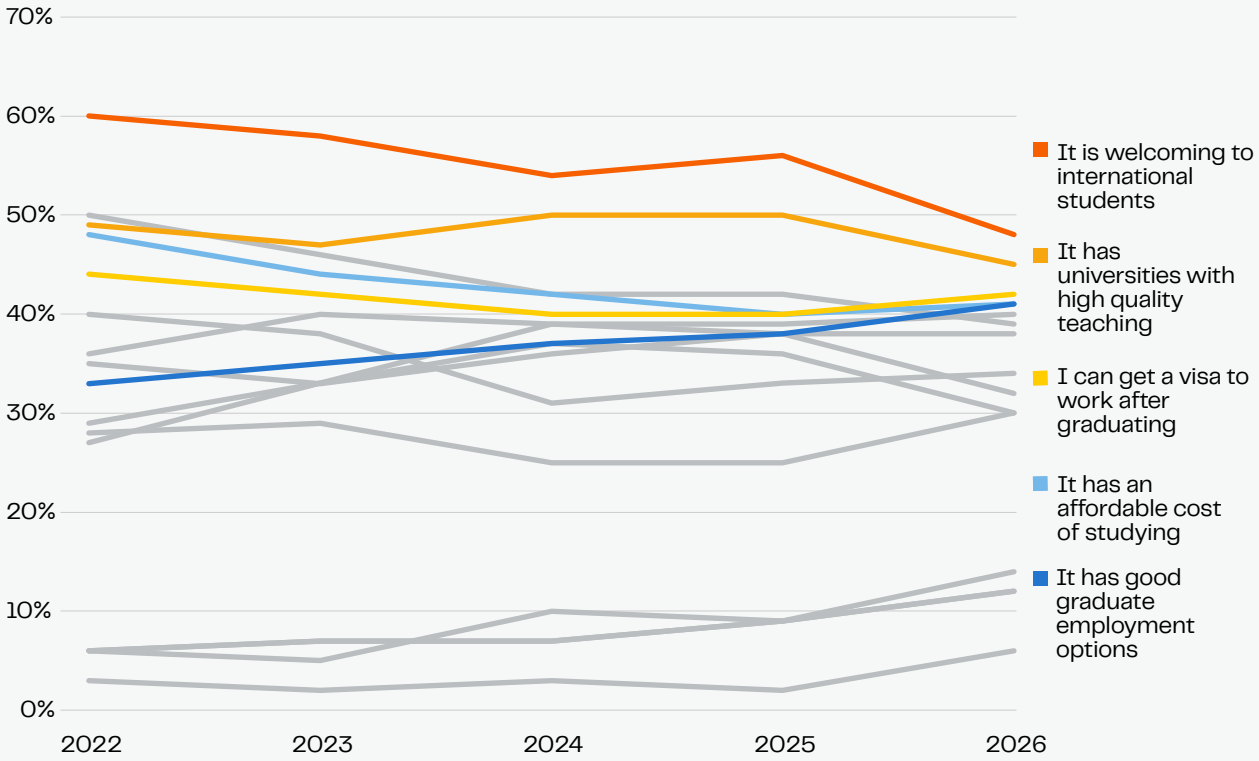
Figure 3. ASEAN inbound trends: Select important factors when choosing a country



Source: QS International Student Survey

Although affordability remains a key strength of ASEAN, both cost-of-living and tuition-related measures have become less influential than they were four years ago. This suggests students are increasingly evaluating destinations through a broader lens that includes employability, support and long-term value.

Figure 4. ASEAN inbound trends: Important factors when choosing a country



Source: QS International Student Survey

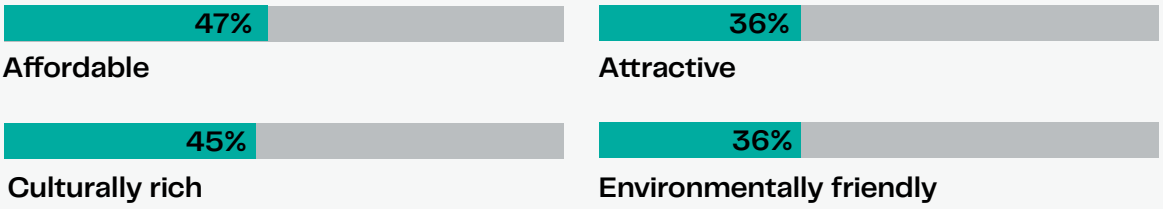
Key questions to consider:

- How are you demonstrating a welcoming and supportive environment to prospective students?
- Can prospective students easily access evidence of graduate outcomes and career success?
- Are you effectively communicating both affordability and long-term value?

Destination perceptions across ASEAN

Indonesia

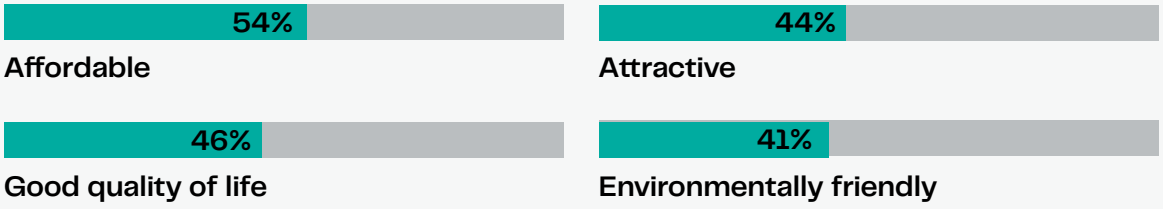
Strongest perceptions



The destination benefits from a strong value proposition built around affordability and culture, although perceptions of work opportunities remain comparatively moderate.

Malaysia

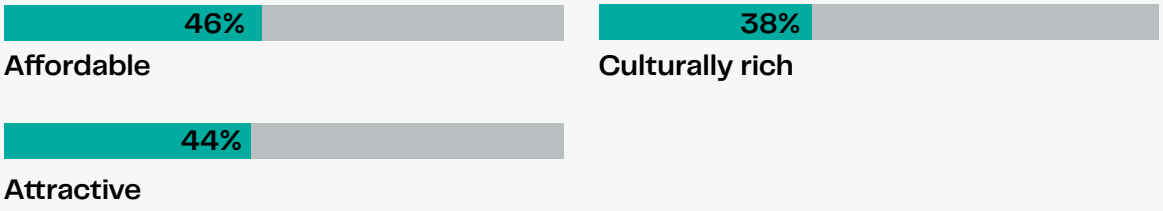
Strongest perceptions



Malaysia combines affordability with lifestyle benefits, creating a balanced proposition for international students.

Philippines

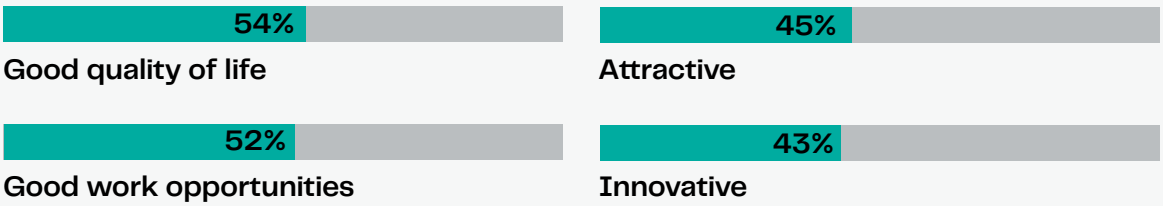
Strongest perceptions



While affordability is a major strength, there is an opportunity to strengthen perceptions around innovation and career outcomes.

Singapore

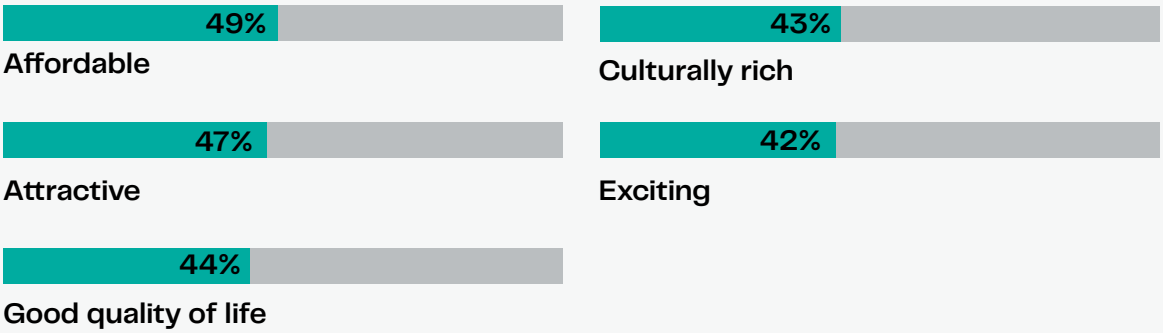
Strongest perceptions



Singapore is also strongly associated with being expensive, highlighting the importance of communicating value and return on investment.

Thailand

Strongest perceptions



The destination's combination of affordability and quality of life represents a significant competitive advantage.

Key questions to consider:

- Does your institution's messaging align with the strengths of your destination?
- How effectively are you addressing concerns around cost, visas and employability?
- Are you using destination strengths to differentiate your institution from competitors?

The sources inbound students use to find information about ASEAN

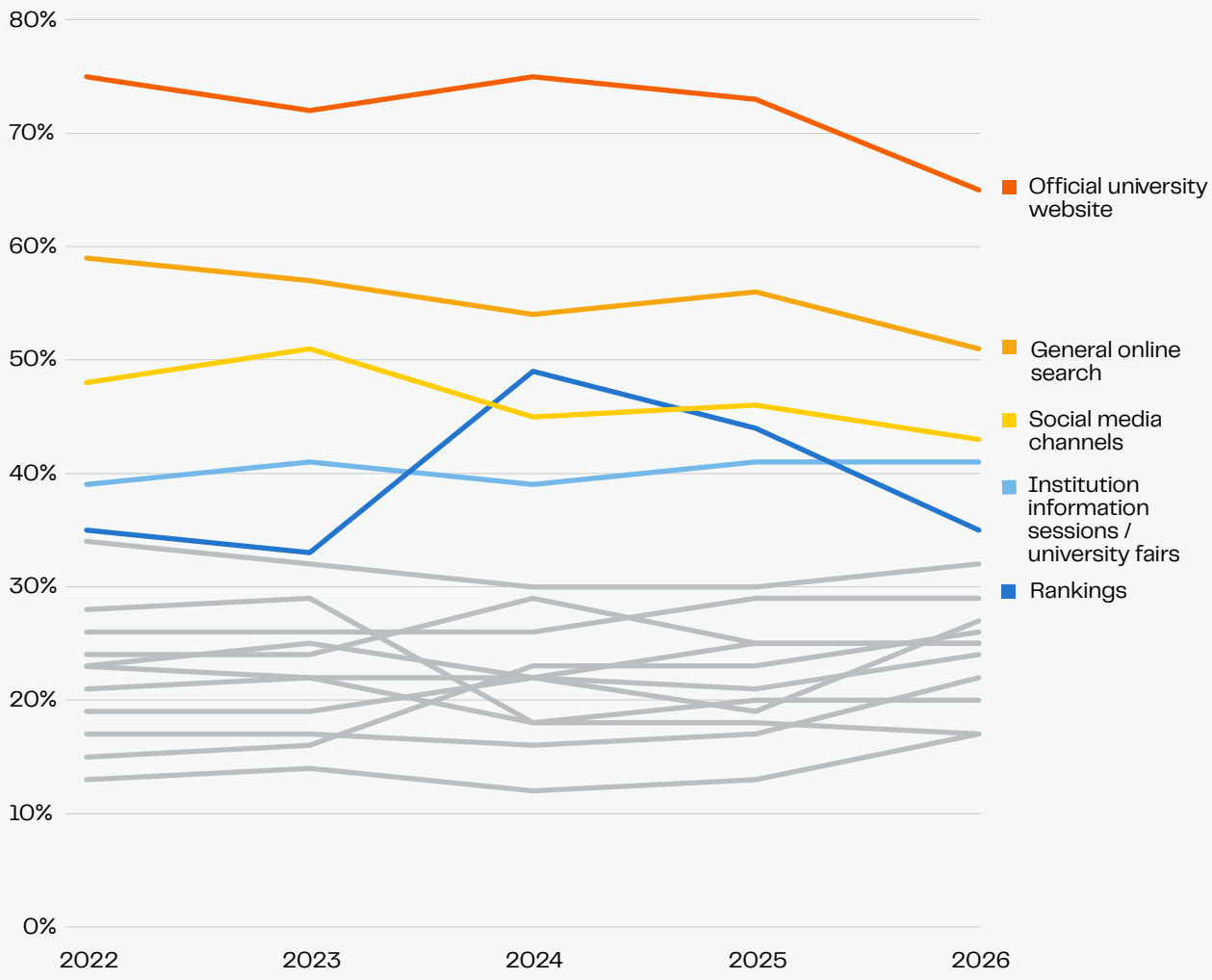
Official university websites remain the most influential information source for students researching ASEAN destinations. However, reliance on institutional websites has declined over time, falling from 75% in 2022 to 65% in 2026.

At the same time, students are increasingly turning to people they trust. Discussions with alumni have risen from 15% to 26%, while education agents have increased from 19% to 27%.

University fairs and information sessions continue to play an important role, while rankings remain influential despite fluctuations across the period.

The findings suggest that students increasingly want both authoritative information and trusted human guidance as they navigate their decision-making process.

Figure 5. ASEAN inbound trends: Information sources



Source: QS International Student Survey

Key questions to consider:

- Is your website providing students with the information they need to make confident decisions?
- How effectively are you engaging alumni to support recruitment?
- Are agents and recruitment partners communicating a consistent institutional message?

Student conversion and communication

Students continue to expect fast and responsive communication from universities.

In 2026, more than half of surveyed students expected a complete response within three days or less.

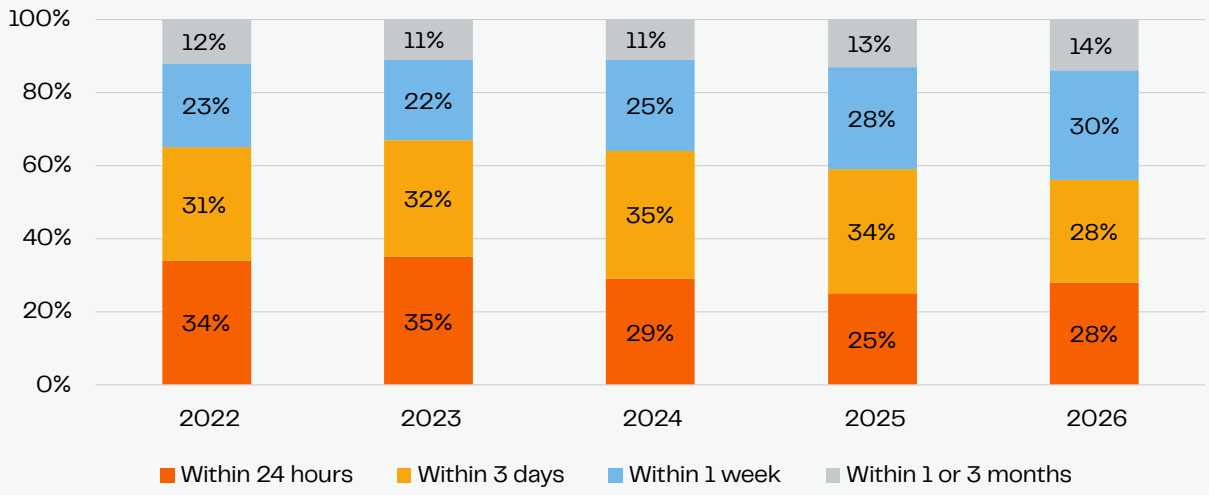
Students also expect rapid communication during the application process. Nearly seven in ten respondents expected notification of their application outcome within one week.

These findings highlight the importance of clearly defined service standards throughout the student journey. Fast responses help maintain engagement and reduce the likelihood that prospective students will lose momentum or choose alternative institutions.

Key questions to consider:

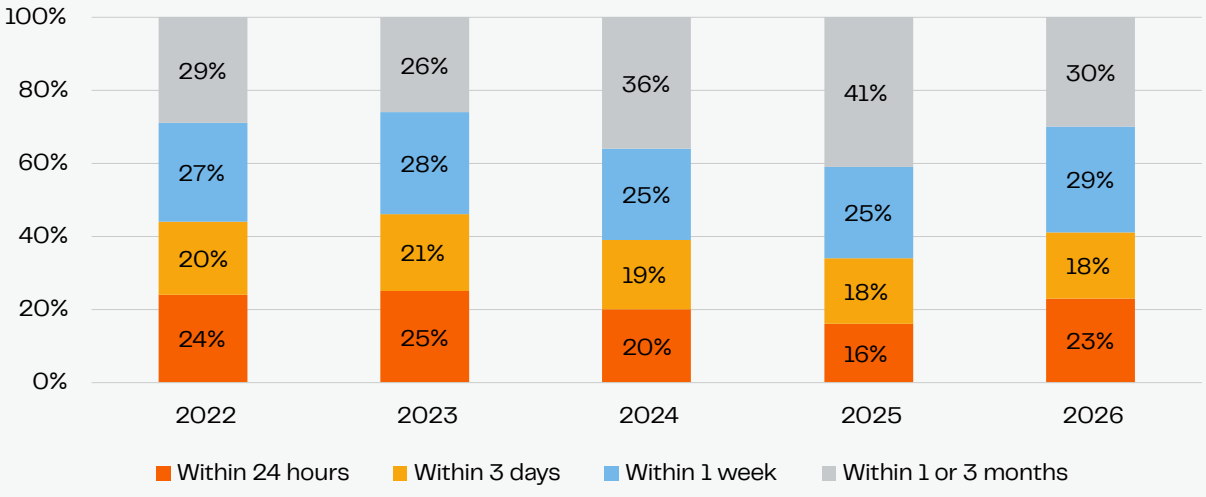
- Are your communication standards aligned with student expectations?
- Do prospective students receive clear updates throughout the application process?
- Which communications could be automated to improve speed while maintaining quality?

Figure 6. ASEAN inbound mobility: Expectation for a complete and personal response to enquiry



Source: QS International Student Survey

Figure 7. ASEAN inbound mobility: Expectation for the outcome of their application



Source: QS International Student Survey

Outbound trends

What do ASEAN students want from global institutions?



Subject level interest

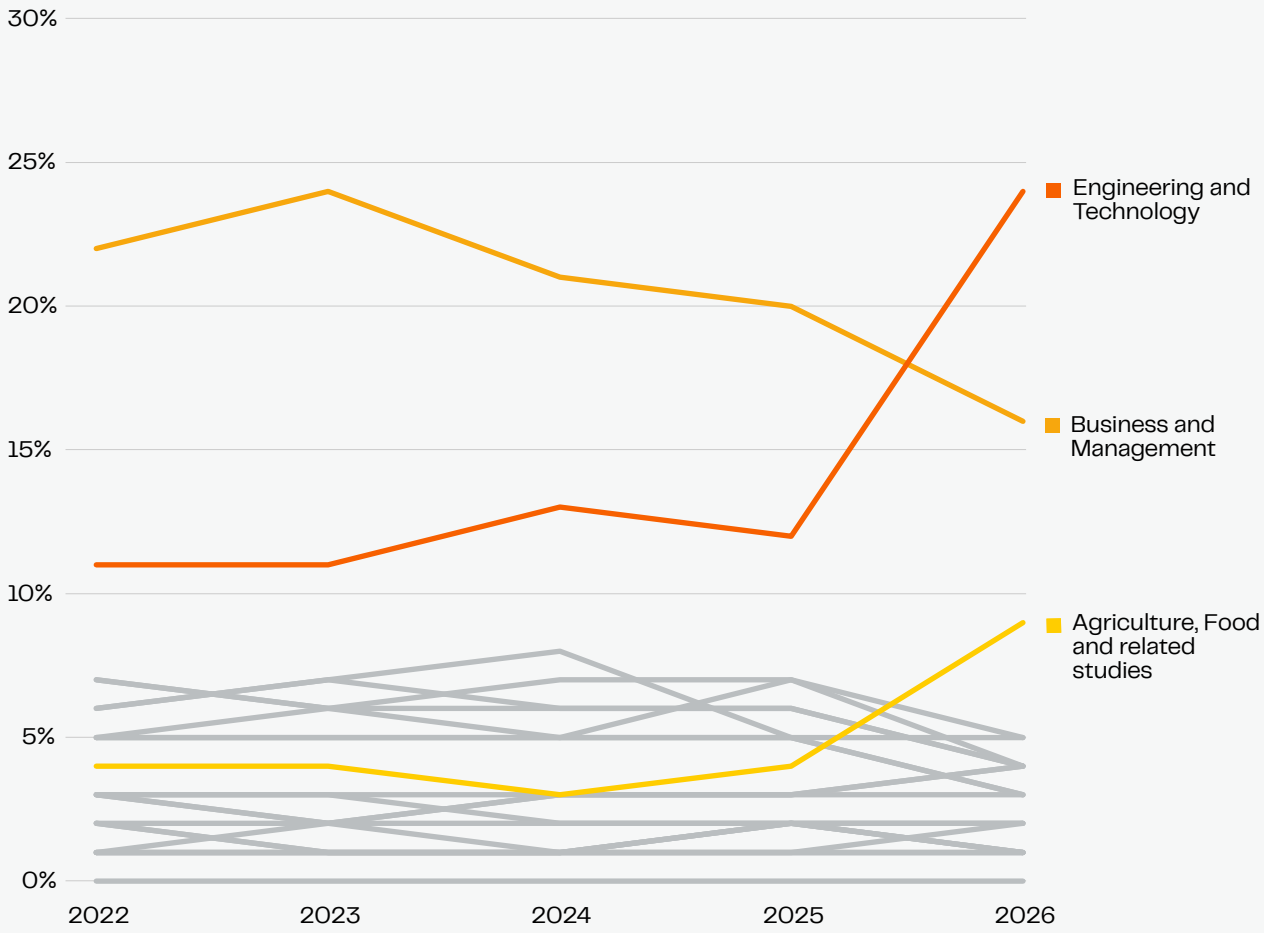
Business and Management remains an important area of study for ASEAN students considering education abroad, but its dominance is declining.

Engineering and Technology has become the leading subject area in 2026, rising sharply to 24%. This represents a substantial increase from previous years and reflects growing interest in technical and future-focused disciplines.

Agriculture, Food and related studies has also grown significantly, reaching 9% of respondents.

Several traditional subject areas have become less prominent. Medicine and Dentistry, Social Sciences and Psychology all record lower levels of interest than in 2022.

Figure 8. ASEAN outbound mobility: Subject-level interest



Source: QS International Student Survey

Key questions to consider:

- Does your programme portfolio align with evolving demand from ASEAN students?
- How effectively are you communicating the value of engineering and technology programmes?
- Are your subject-level marketing messages aligned with student priorities?

What drives outbound mobility?

Teaching quality has become the single most important factor influencing destination choice among ASEAN students considering study abroad, after a welcoming environment dropped by 11% between 2025 and 2026.

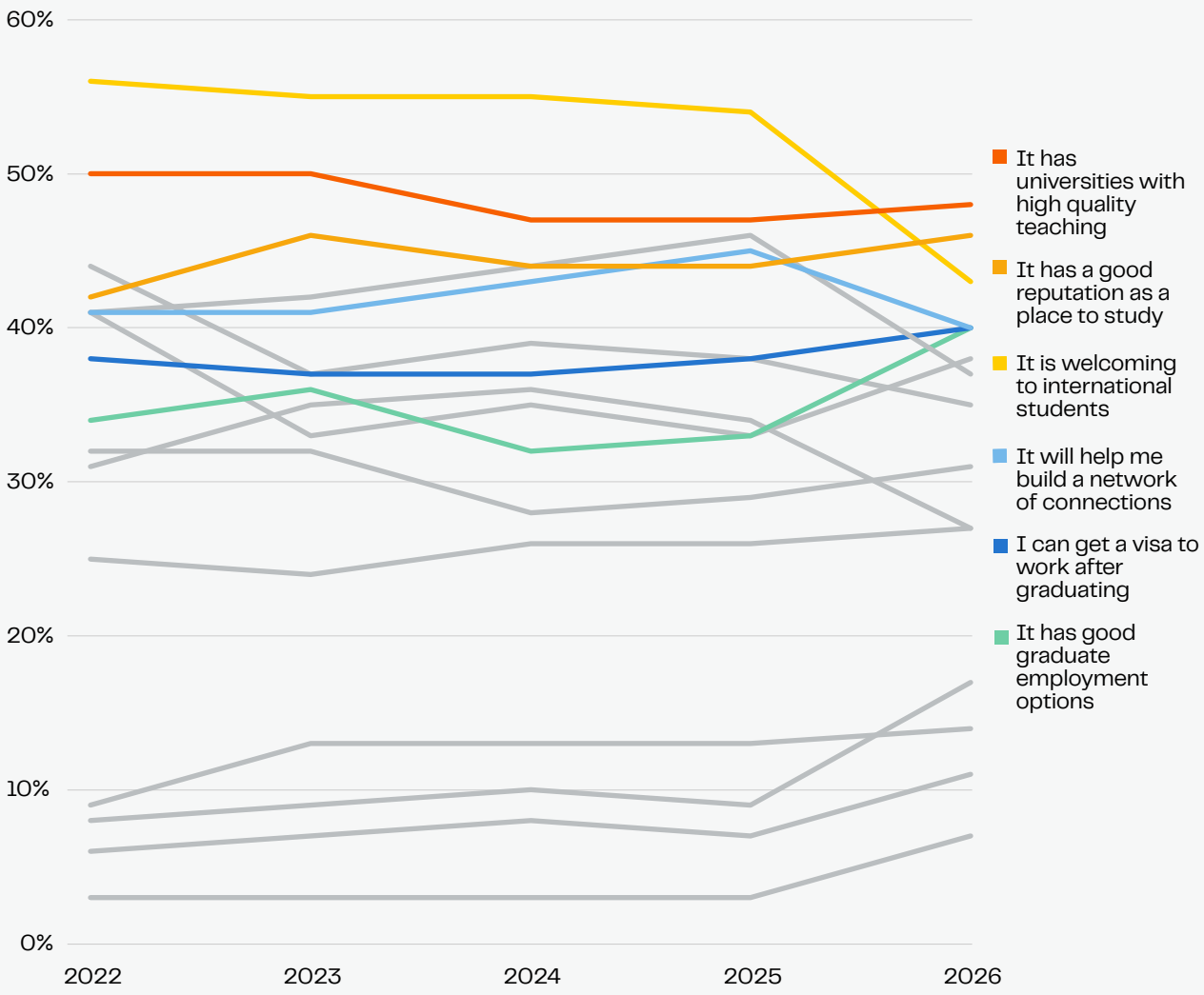
Destination reputation also remains highly influential, alongside employability and post-study work opportunities.

Students are increasingly focused on outcomes. Graduate employment opportunities are more important than they were in 2022, while recommendations and personal connections have become more influential.

At the same time, affordability remains important, particularly in relation to tuition costs. Students are increasingly balancing academic reputation against cost and long-term career value.



Figure 9. ASEAN outbound mobility: Important factors when choosing a country



Source: QS International Student Survey

Key questions to consider:

- How are you demonstrating teaching quality beyond reputation alone?
- Are you providing clear evidence of graduate outcomes?
- How effectively are you communicating value for money and long-term return on investment?



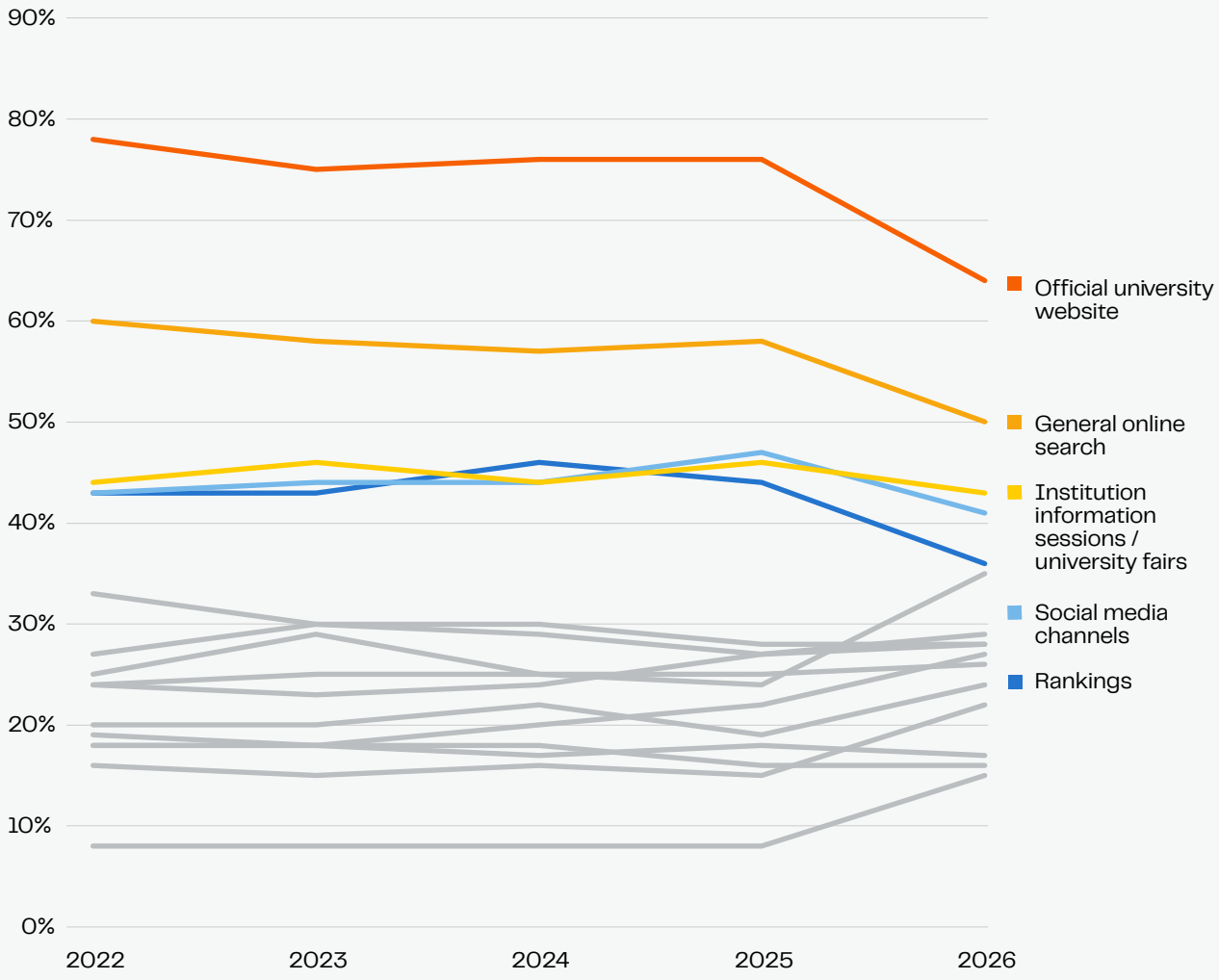
The sources of information students use to make decisions

University websites remain the most useful information source for outbound students, but their influence has declined significantly since 2022.

Students are increasingly turning to alumni, education agents and admissions staff for guidance. Rankings continue to play an important role, while social media remains influential despite a slight decline since 2025.

The growing importance of trusted intermediaries suggests that recruitment strategies should focus not only on institutional channels but also on the people and networks that influence student decisions.

Figure 10. ASEAN outbound mobility: Information sources



Source: QS International Student Survey

Key questions to consider:

- Are your digital channels providing clear and compelling information?
- How effectively are you engaging alumni and agents?
- Which information sources generate the strongest recruitment outcomes?

Student conversion and communication

ASEAN students continue to expect rapid responses from institutions throughout the recruitment process.

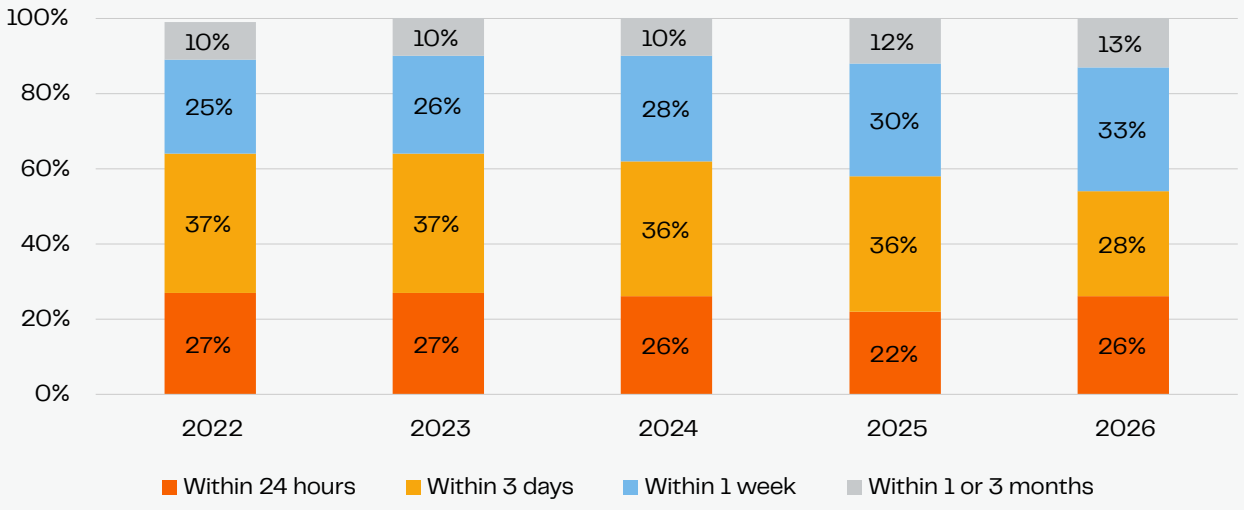
More than half expect a complete response to an enquiry within three days or less, while seven in ten expect application outcomes within one week.

Although expectations for immediate responses have softened slightly since 2022, speed remains an important differentiator in a competitive market. Institutions that combine responsiveness with personalised communication are likely to maintain stronger engagement throughout the recruitment journey.

Key questions to consider:

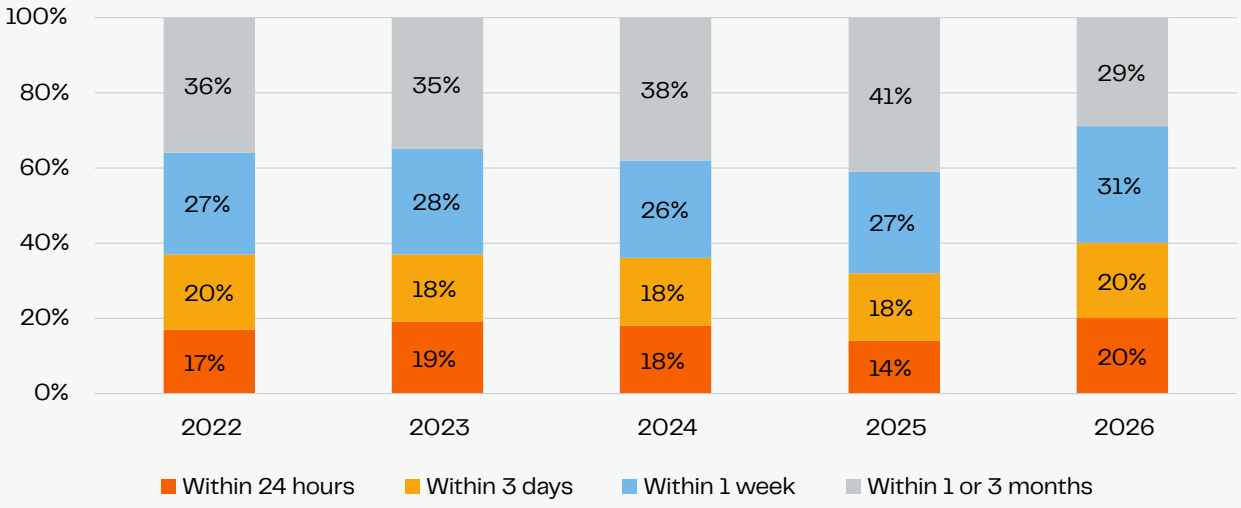
- Are response times aligned with student expectations?
- How can communication workflows be improved to increase responsiveness?
- Which enquiries should be prioritised to ensure high-intent students receive timely

Figure 11. ASEAN outbound mobility: Expectation for a complete and personal response to enquiry



Source: QS International Student Survey

Figure 12. ASEAN outbound mobility: Expectation of application outcome notification



Source: QS International Student Survey

Methodology

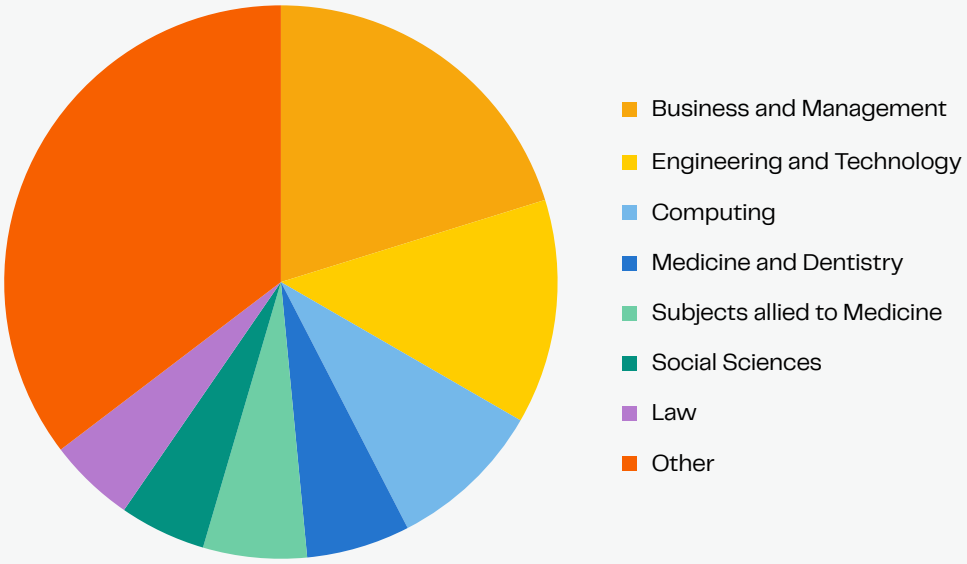
The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2026 iteration draws on responses from over 42,115 students in 191 locations, and this report uses over 500,000 responses from the past 5 years.

The questions in the Survey are designed to enable higher education institutions to make sound decisions on recruitment and communication strategies. Now combined with Global Student Flows data, we offer a well-rounded view of where students are choosing to study, and how they make that decision. To understand what matters to students, we ask a wide range of questions about their pre-enrolment journey. We want to know what students prioritise when choosing a location, university and course, and we want to understand what they perceive as high quality teaching. We ask students how their family influence decision making, and we gather data on the social media and digital channels they use to find study information. The International Student Survey also benefits from its longevity – 2026 is our 14th edition. The consistency in our questioning allows us to see how students' answers change over time, and predict future trends and shifts. Its yearly format allows us to add new questions to get a snapshot of student perception.

The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 82 universities globally, who were invited to share the Survey with their own prospective international students. Fieldwork for the Survey was conducted between January 5 and April 6 2026, via Qualtrics, an online survey management platform. The Survey contains 50 unique questions, covering a range of topics relating to prospective student decision making, from their study background to their priorities, marketing communication preferences, through to their principal information sources, career aspirations, and post-study plans. The 2026 iteration of the Survey also contains questions on candidate perceptions of different locations as study destinations. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

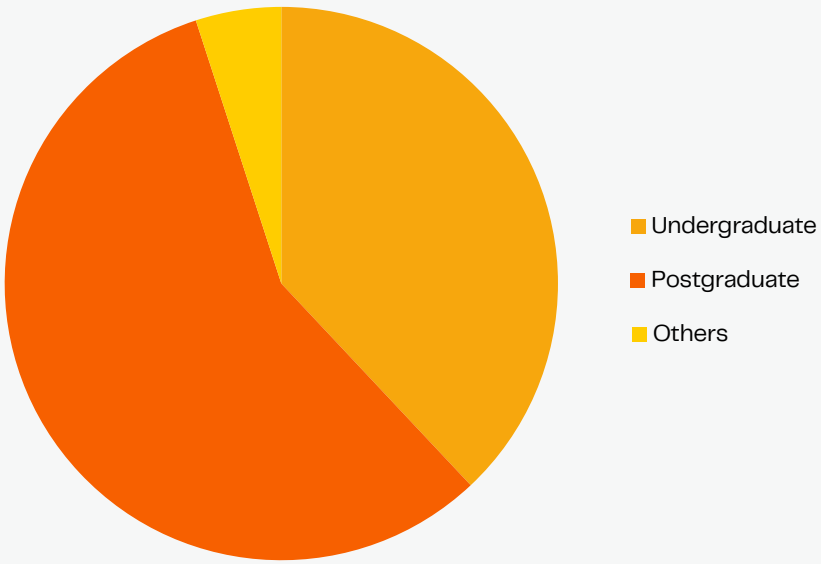
International Student Survey respondent demographics

Subject preference



Source: QS International Student Survey

Study level



Source: QS International Student Survey

QS, your higher education partner

In today's challenging times, universities are reviewing their strategies and preparing for a different future. We are the partner who can help.

With unrivalled data, global reach, and sector expertise, we have deep knowledge of higher education globally and how to drive performance, engagement, and growth.

For more than three decades, we've worked in partnership with thousands of universities across the globe.

We help to:

- Transform complex data into clear, actionable intelligence
- Connect universities with the right students through our platforms, data, and targeted engagement
- Support innovation, new models, and market expansion for long-term institutional growth
- Provide sector-leading analytics and insights to enable global benchmarking and performance improvement
- Map in-demand skills needs to teaching, research, and employability for future workforce readiness

Explore more student recruitment insights