Australia and New Zealand

Global Student Flows
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Foreword

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I am delighted to bring you the **Global Student Flows: Australia and New Zealand** report. Over the past eight years, the Global Student Flows Initiative has become an essential resource for policymakers, and institutional and industry leaders as international student mobility continues to be critical for a nation's economy and future skills excellence.

This year, we have expanded the scope of our Initiative. Now, QS datasets, including the International Student Survey and institutional performance data, enable us to offer a more holistic view of international student mobility in Australia and New Zealand.

Australia and New Zealand are, and will continue to be, key players in the international student market, with Australia being one of the "big four" study destinations. However, with traditional source markets jostling to become regional hubs and retain talent, institutions will need to lean on their established strengths and re-think their strategies as they move towards 2030 and a new decade. In the recent conversations I have had with leaders across the region, it's clear that insights and recommendations that enable effective strategic planning are essential, now more than ever.

This report offers a full picture of international student mobility in Australia and New Zealand. With our evidence-based framework, we outline a forecast for international student recruitment in Australia and New Zealand in 2030, and how it will be impacted in each of our three scenarios: Regulated Regionalism, Hybrid Multiversity and Talent Race Rebound. These scenarios offer you a strategic lens from which you can comprehensively plan for the medium-term.

We also explore inbound and outbound student trends, which, when overlaid with QS International Student Survey data, provide actionable recommendations on how to tailor your student recruitment strategies.

QS is wholeheartedly committed to supporting both countries in their transition. The insights in this report are just a start - our expert teams provide sector-leading analytics to empower global benchmarking, connect universities to the right students through data-driven engagement and support innovation and skills development to enable long-term, sustainable growth.

This report would not be possible without the insights of policymakers, institutional leaders and experts who have contributed their time to our Initiative. My thanks also go to our outstanding team at QS, whose dedication, professionalism, and thorough research have been instrumental in shaping this report and advancing the broader Global Student Flows Initiative as a valuable resource for the international education community.

Executive summary

Low growth shifts the battleground to differentiation

Through to 2030, international student recruitment in both Australia and New Zealand (NZ) is expected to stagnate following a post-COVID boom period in Australia and a slower recovery in NZ, with forecast growth of 2% and 5% respectively. China and India are projected to remain the primary sources for international students for both countries. Geopolitical factors restricting demand, combined with the rising reputation and openness of new destinations are critical drivers behind this stagnation.

As global demand for Australia and NZ's higher education plateaus, competition from nations outside the "big four" is intensifying - our Global Student Flows data forecasts that Asia and the Middle East will grow as destinations as they compete to become regional hubs.

Students are becoming more selective, and driven by institutional reputation, inclusiveness, and post-study outcomes. In a low-growth environment, where growing market share is the key to success, institutions need to prove their value proposition and demonstrate clear return on students' investment. However, while data from the QS Academic and Employer Reputation Surveys show that the top universities in Australia and NZ are maintaining their Academic Reputation year on year, the 'average' university has a declining reputation among these key stakeholder groups. Simultaneously, institutions in emerging study destinations across Asia are enhancing their performance on this key metric. To win, universities will need to leverage and communicate their unique reputation and outcome-based strengths as competition intensifies domestically, as well as globally.

Labour market alignment and employment outcomes will be key to outperform the market

Both Australia and NZ face persistent shortages in high-skilled labour, particularly in healthcare, engineering, technology, and education. These structural gaps in the domestic workforce create a strong demand-side pull for international talent. When aligned with clear, stable migration pathways, international education becomes a reliable talent pipeline - allowing economies to upskill and increase productivity. In this context, international students become a key lever in long-run human capital strategy, rather than temporary residents.

For Australian universities, this is a challenging area as the federal government responds to domestic pressure to slow migration, while, in contrast, the NZ government has recently moved to change student visa-related policies and settings to attract international students to the country. However, according to data from the QS World Future Skills Index, both countries are challenged when it comes to the satisfaction of employers with the skills of their graduates today. This is further emphasised by QS World University Rankings data - over time Australian universities have dropped on average by 238 places for Employer Reputation and NZ universities have dropped universities by 191 places. Addressing this mismatch will be vital to future success.

Data from the QS International Student Survey highlights that students are increasingly looking for reassurance that their course will put them on the right career path through work placements and upskilling opportunities during their studies. Aligning programme portfolios to labour market needs and adopting more agile curriculum development practices will help in ensuring key skills are being taught.

Diverging political strategies may bring about different fortunes

Despite facing similar headwinds, the two nations are currently adopting very different approaches to international education. Responding to a general anti-migration sentiment, fuelled by an accommodation crisis, Australia's policy environment has become increasingly stringent over the past 18 months with price increases that have seen the student visa fee become the most expensive in the world. Such shifts are threatening to further depress the forecast 2% growth in coming years. NZ, on the other hand, has yet to reach its pre-COVID number of international students, and the government has recently announced a goal of doubling revenue from the sector by 2034, with changes to student visa settings already implemented and a shift from diversification of the student cohort to a focus on three key markets.

Aside from policy changes, Australia's higher education fortunes have the potential to change. In the QS World Future Skills Index, Australia's Academic Readiness is among the best in the world meaning Australian higher education is ready to adapt and deliver the future oriented skills required by employers. Australia has a strong foundational perception in-market, being known among prospective students for good quality of life, work opportunities and safety, and is not especially known for its challenging visa process (QS Country Perceptions Survey 2024), but this perception is at risk due to the less than welcoming policy environment.

NZ is well positioned to actualise its ambition for growth. A welcoming environment is the top priority for students looking to study in NZ when deciding on a country, and its recent strategy announcement to welcome 35,000 additional international students by 2034 will only help its perception. The country is building a strong future talent foundation, shaped by high-quality education, a values-driven workforce, and growing capability in sustainability-aligned sectors.

Three scenarios to help navigate future uncertainty

The Global Student Flows Initiative 2025 uses three scenarios grounded in extensive research as a lens through which to understand the medium-term outlook of higher education in the region within the global context: **Regulated Regionalism** sees Australia and New Zealand remaining as key study destinations, but enrolment becomes selective, transparent, and aligned to national goals. **Hybrid Multiversity** would see students complete most of their education online or at domestic institutions before travelling to Australia or New Zealand for shorter, focused in-person experiences. In a **Talent Race Rebound** scenario, national and regional governments would reposition international education as a pathway to attract talent and fill skills gaps. Institutions need to effectively scenario plan to mitigate the risks and opportunities associated with these scenarios, enabling them to stress test their strategic thinking and navigate uncertainty.

TNE provides a potential solution

For both countries, transnational education (TNE) could offer an alternative pathway towards financial stability. Though static international student numbers and constrained budgets may make offshore TNE unfeasible for many institutions, migration policy continues to be the focus of public debate, especially in relation to the housing crisis, meaning there is increased interest from Australian universities in the TNE space. Southeast Asia also continues to be a focus for TNE, including online provision. As concerns grow regarding the accessibility and affordability of an onshore Australian education for many in the region, TNE offers a significant opportunity as students look to study closer to home and reduce the cost of study and living. No NZ university has announced plans to operate a campus offshore, but Education NZ's recently launched strategy does reference TNE as a contributor to the revenue goals set for the international education sector to achieve by 2034.

Strategic challenges

1. Market position and differentiation
How can universities in Australia and New Zealand develop distinctive value propositions that resonate with increasingly selective international students, particularly in a low-growth market dominated by China and India?

2. Reputation and competitiveness
What targeted strategies can universities outside of the upper echelon adopt to reverse declining Academic and Employer Reputation scores, and close the gap with both top-ranked domestic institutions and rising competitors in Asia?

3. Labour market alignment
With skills gaps apparent, how can higher education institutions better align programme portfolios, curriculum design, and work-integrated learning opportunities?

4. Policy and migration pathways
What coordinated actions can universities, government and industry take to create policy environments that both address domestic concerns - such as housing and migration - and foster new long-term growth of the international education sector?

5. Transnational education as a growth lever
What models of transnational education - branch campuses, online delivery, or hybrid formats - can be most effectively deployed to capture demand from students in Asia and the Middle East who seek more affordable, accessible alternatives to onshore study?

The market context

From recovery to restrictions

Australia's policy environment has become increasingly more stringent over the past 18 months with tougher English language proficiency requirements and rises that have seen the student visa fee become the most expensive in the world. In the five years leading up to the pandemic, enrolments grew at an average rate of nearly 10% annually. The pandemic reversed this trend, driving numbers down by more than a third by 2021 compared to 2019 levels. Post-COVID, there was a faster than anticipated bounce back in international student numbers in 2023, with student numbers growing by 40% that year." Much of this growth was attributed to pent up demand from students who had continued to apply and accept offers to come onshore throughout the pandemic, but had been unable to arrive in Australia. As this momentum eroded, growth eased to 8% in 2024.

Another contributor were the policy shifts implemented during COVID to respond to labour shortages in some key sectors, enabling international student visa holders to work a higher number of hours alongside their study, and a special COVID visa that enabled them to work full-time. Some time after border restricitions eased, the policy environment moved back towards pre-pandemic settings. In response to the rapid growth, and amid concerns about the quality and integrity of the international education sector, Ministerial Direction 107 was implemented to prioritise visa processing for some education providers over others. This led to uneven growth, with some universities struggling to meet their expected numbers in 2024.

Despite that slowdown, public anti-migration sentiment saw the federal government move to make legislative changes that would effectively cap international student numbers at the individual provider level. When that change failed to pass through Parliament, each provider was given a New Overseas Student Commencement (NOSC) allocation, which was also tied to the implementation of Ministerial Direction 111. The latter was designed to deprioritise visa processing for any institution that went past 80% of its NOSC allocation. The total NOSC allocation for 2025 was 270,000, split across universities and vocational education providers, and is unlikely to be met. The figure for 2026 (295,000) was announced in early August, purportedly allowing for sustainable growth of the sector. However, the percentage increases again vary by sub-sector. Together, the various changes and visa fee increases have adversely impacted the critical English language sector and some public and post-secondary providers, which will have a pipeline impact on commencing student numbers in the years to come. Further legislated measures to assure the quality and integrity of the sector are a stated priority of the federal government and expected to be moved soon.

Much of the country's attraction as a study destination is attributable to its established reputation for quality provision and student experience, as well as established language and academic pathways. With nine of its 46 universities ranked in the top 100 of the QS World University Rankings 2026 and relatively high scores overall for International Collaboration, International Faculty Ratio and the International Student Ratio, Australia has been firmly entrenched as one of the "big four" study destinations globally. However, international student numbers have not been evenly distributed, with Sydney and Melbourne hosting more than two-thirds of them, despite previous government moves to incentivise studying at regional universities through the provision of scholarship funding and additional years of post-study work rights.

The past year has seen a number of universities announce restructures and redundancies, and the closing of academic departments and research centres, coming not long after similar moves in response to COVID and border closures. Concerns regarding the readiness of Australian graduates in the areas in which Australia needs more skilled workers are reflected in declining performance in the Employer Reputation indicator in the latest QS World University Rankings, with 25 of Australia's 36 ranked institutions falling. The former government's Job Ready Graduates (JRG) policy, which saw differential funding incentives at the institutional level and increased domestic tuition fees for individual students in an effort to encourage students into disciplines outside of the arts and humanities has not had the intended effect. The Australian Tertiary Education Commission (ATEC) will undoubtedly play a critical role in determining both the future funding landscape and global excellence of the country's universities, as well as their attractiveness to internationally mobile students.

New Zealand, in contrast to its near neighbour, has not witnessed the same post-pandemic recovery in international student numbers, with its border not reopening to international students until August 2022, effectively shutting them out until the beginning of the 2023 academic year the following February. In the five years before the pandemic, international student enrolments in universities and English language schools in New Zealand grew by around 7% annually. In 2022, however, there were fewer than 30,000 enrolments - less than half the 62,000 recorded in 2019. Although 2023 brought strong growth, the loss of the pipeline coming through, particularly into English language programmes, has kept overall numbers below pre-pandemic levels. Post-pandemic growth has averaged 11%, lifting enrolments to just over 60% of 2019 levels by 2024, lagging well behind Australia's rebound.

Also in contrast to Australia's current stance in regard to international student recruitment, the NZ government has recently launched an ambitious goal of doubling the sector's economic value by 2034 as part of its broader "Going for Growth" strategy. It is worth noting that the actual enrolment numbers targeted under this strategy are only just above the 2019 level (119,000 as compared to 115,000). Migration policy settings have already been changed to support this ambition, with part-time work hours expanded to 25 per week (previously 20 and not dissimilar to Australia's 48 hours per fortnight) and extending the eligibility to work to a broader range of student visa holders. The introduction of multi-year visas for some cohorts is also seen as a way of improving the country's attractiveness as a study destination. NZ has also introduced fast-tracking of visa processing for Indian students from study to residency. Given the emphasis on increasing the diversification of the international student body in Australia and elsewhere, the approach adopted by Education New Zealand under this new strategy is to focus on three markets. In addition to revenue and enrolment targets, NZ is also looking to position itself among the leading study destinations globally, with the goal of increasing the percentage rating it among their top three study choices from 18% to 22% in ten years.

The higher education system in NZ is one of the few where all its universities feature in the top 500 of the QS World University Rankings 2026. As with their Australian neighbours, Employer Reputation remains relatively low, with their Employment Outcomes outperforming many in the "big four" but not matched in reputation. This issue has also been noted by the Tertiary Education Commission (TEC), which has reinforced the need for programme changes to be made to ensure they are delivering the qualifications and skills the country's industries need. All eight universities are public institutions and, like many of their counterparts, are facing declining government funding and financial constraints. TEC has stated they should not be planning on any increase in 2026, but will instead need to reprioritise available funds. Moves by the government to encourage international students will no doubt be welcomed as their importance as a source of revenue is only likely to increase. While the country's higher education sector is limited to eight universities, these institutions stand out on a global scale.

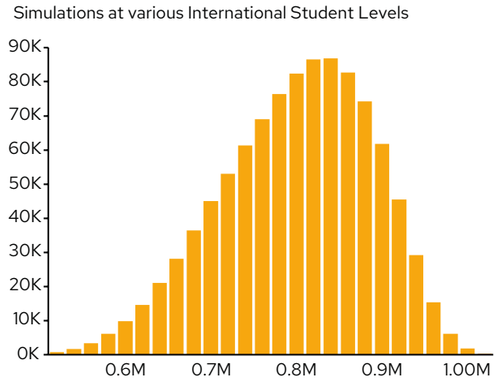
2030 outlook

Stagnant growth and intensifying competition

Total enrolments in Australia's international student sector are projected to reach 770,000 by 2030 in our baseline scenario. This is equivalent to 2% annual growth (the total student number includes students in higher education, English language, and non-award courses, but excludes those in vocational training). While this growth rate marks a slowdown from the long-term average of 8% and the post-COVID rebound of 5%, it reflects a broader cooling across major study destinations.

The sector has reached an inflection point - no longer is it defined by rapid expansion, but by how it manages risk, diversification, and policy recalibration. Dependencies built over the past two decades on China and India are now raising tough strategic questions. In Australia the expansion started in the early 2000s when China's share of international students in the country more than doubled - from 9% in 2000 to over 20% within five years. India and its South Asian neighbours also overtook many East and Southeast Asian markets, both in numbers and share of enrolments during this period. But that momentum has brought new challenges, especially as reliance on a narrow group of markets highlights the vulnerabilities in Australia's fourth-largest export industry.

Figure 1. Simulation frequency for total international students to Australia and New Zealand in 2030



Source: QS Global Student Flows, August 2025

In the period to 2030, China and India are projected to remain the primary sources of growth in student numbers. Rising geopolitical friction with the US may further increase Australia's appeal for Chinese students, while India's expanding youth population and economic trajectory signal ongoing growth. Among Australia's other top source markets, there are signs of renewed activity. Countries like Indonesia, Taiwan, South Korea, and Singapore, which have historically seen flat or declining student numbers over the long term, posted a notable increase in visa approvals in the second half of 2024. But with ageing populations and signs of saturation, sustained growth from these markets over the longer term is less likely.

Policy shifts, such as higher visa fees introduced in 2024, have already impacted English language enrolments, especially from Latin America, where most students are concentrated in this segment. Still, demand from the region had been rising steadily until that point, and there's potential for recovery if pricing and visa settings are recalibrated.

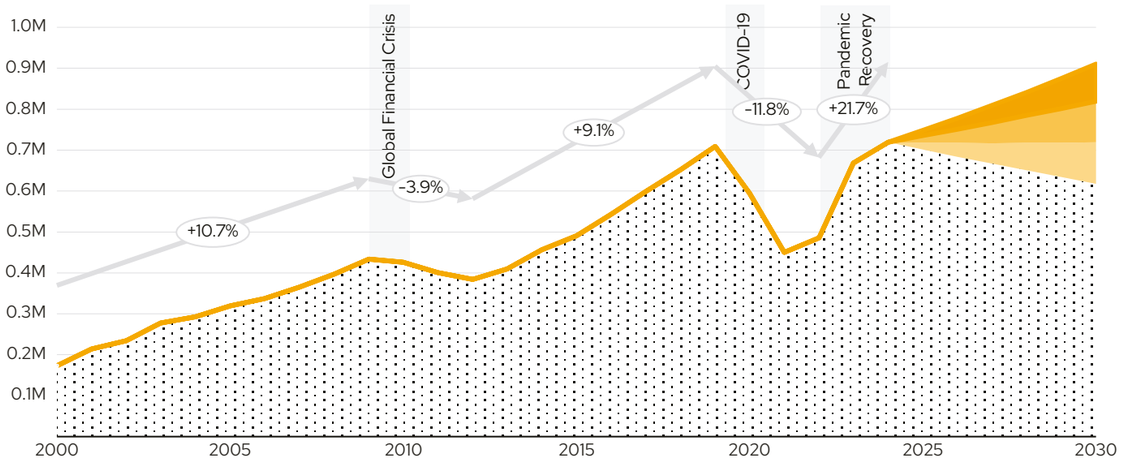
Structural headwinds in main source markets - such as China's own economic slowdown and efforts to bolster domestic universities - pose downside risks to the outlook. Domestic politics and geopolitics also remain a wildcard, as the experience during COVID highlighted how broader political dynamics can shape education ties. India's outlook is more demand-driven, underpinned by favourable demographics and economic growth. But growth from this region is likely to be capped by Australia's more restrictive visa policies. Alongside practical hurdles, this creates perception risk - adding an element of uncertainty for prospective students.

In contrast to Australia, NZ, accounting for around 5% of the combined international student market across the two countries, has more room to grow, with projected annual growth of 5%. The country is still recovering from a slow post-COVID rebound and remains at just 83% of 2019 levels. However, a more welcoming policy environment, particularly for students from South Asia and Africa, is set to position NZ favourably as Australia adopts a more restrictive stance.

With projected growth of 2% per year, Australia ranks second among the top four study destinations, behind the UK. Growing concerns around safety and policy uncertainty in North America are likely to divert students toward more predictable markets. Yet, Australia's own policy tightening risks creating a perception barrier that could limit its advantage. There is also increasing competition from within Asia Pacific. At the start of the millennium, Singapore, Indonesia and Malaysia ranked among Australia's top source countries. Today, all three are positioning themselves as regional education hubs, shifting from partners to competitors in the battle for Asia Pacific's students. But Australia maintains a strong TNE footprint in East Asia, with numerous branch campuses in Malaysia and Singapore. This presence positions it well to capture growth as more students study within the region. Nearly half of its offshore campuses are in Southeast Asia, particularly in Malaysia and Singapore.

While our base case remains cautiously optimistic, downside risks should not be ignored. A sharper slowdown in China, financial instability in key markets, or further tightening of migration settings could undercut growth. Conversely, an upside scenario - driven by continued redirection from North America, stronger recovery in Southeast Asia, and stable geopolitics - could see stronger gains for both Australia and NZ.

Figure 2. Total international students studying in Australia and New Zealand, 2000-2030F



Figures include higher education, ELICOS, and non-award enrolments in Australia and university and English language programs for New Zealand. Enrolments in schools and VET are excluded.

Source: QS Global Student Flows, August 2025

Figure 3. Top 20 source countries to Australia and New Zealand. 2024-2030F

Country	2024 Rank	2024 Flow	2030 Rank	2030 Flow	2024 - 2030 CAGR	Lower to Upper Confidence Interval - CAGR Spread
China	1	210K	1	261K	3.7%	-4% 7%
India	2	100K	2	122K	3.5%	-3% 8%
Nepal	3	52K	3	60K	2.3%	-6% 6%
Vietnam	5	33K	4 ▲	42K	4.1%	-4% 10%
Colombia	4	33K	5 ▼	28K	-3.0%	-10% 6%
Bangladesh	6	18K	6	23K	4.3%	-8% 12%
Sri Lanka	7	18K	7	23K	4.5%	-3% 10%
Indonesia	9	16K	8 ▲	21K	4.6%	-4% 8%
Brazil	8	17K	9 ▼	16K	-1.7%	-8% 6%
Pakistan	10	16K	10	15K	-0.7%	-9% 5%
Japan	11	14K	11	15K	1.5%	-3% 6%
Bhutan	12	14K	12	15K	1.2%	-5% 6%
Malaysia	14	12K	13 ▲	13K	1.0%	-5% 4%
Hong Kong (SAR)	15	11K	14 ▲	11K	0.4%	-4% 4%
Thailand	13	12K	15 ▼	11K	-2.1%	-7% 4%
Philippines	16	10K	16	10K	-0.4%	-5% 3%
US	18	9K	17 ▲	9K	0.7%	-4% 4%
Kenya	19	9K	18 ▲	9K	1.0%	-4% 5%
Taiwan	20	8K	19 ▲	9K	1.2%	-5% 6%
Mongolia	22	7K	20 ▲	8K	2.6%	-3% 7%

-10% -5% 0% 5% 10%

Source: QS Global Student Flows, August 2025

Australia and New Zealand inbound trends

Student origins

In our baseline scenario, Australia's international student numbers are set to grow at a modest pace of around 2% annually through 2030. That would take the total from around 680,000 students today to just under 770,000 by the end of the decade (the total figure includes students enrolled in higher education and English language courses but excludes those in vocational training). It marks a notable slowdown from the pre-COVID boom, when student numbers grew at nearly 10% per year over the six years up to 2019.

The deceleration isn't unique to Australia. A combination of slower economic growth in major sending countries - particularly China - and tighter policy settings in host countries is dampening momentum across the global education sector. In this context, Australia is expected to see the second-fastest growth among the major Anglophone destinations, behind the UK.

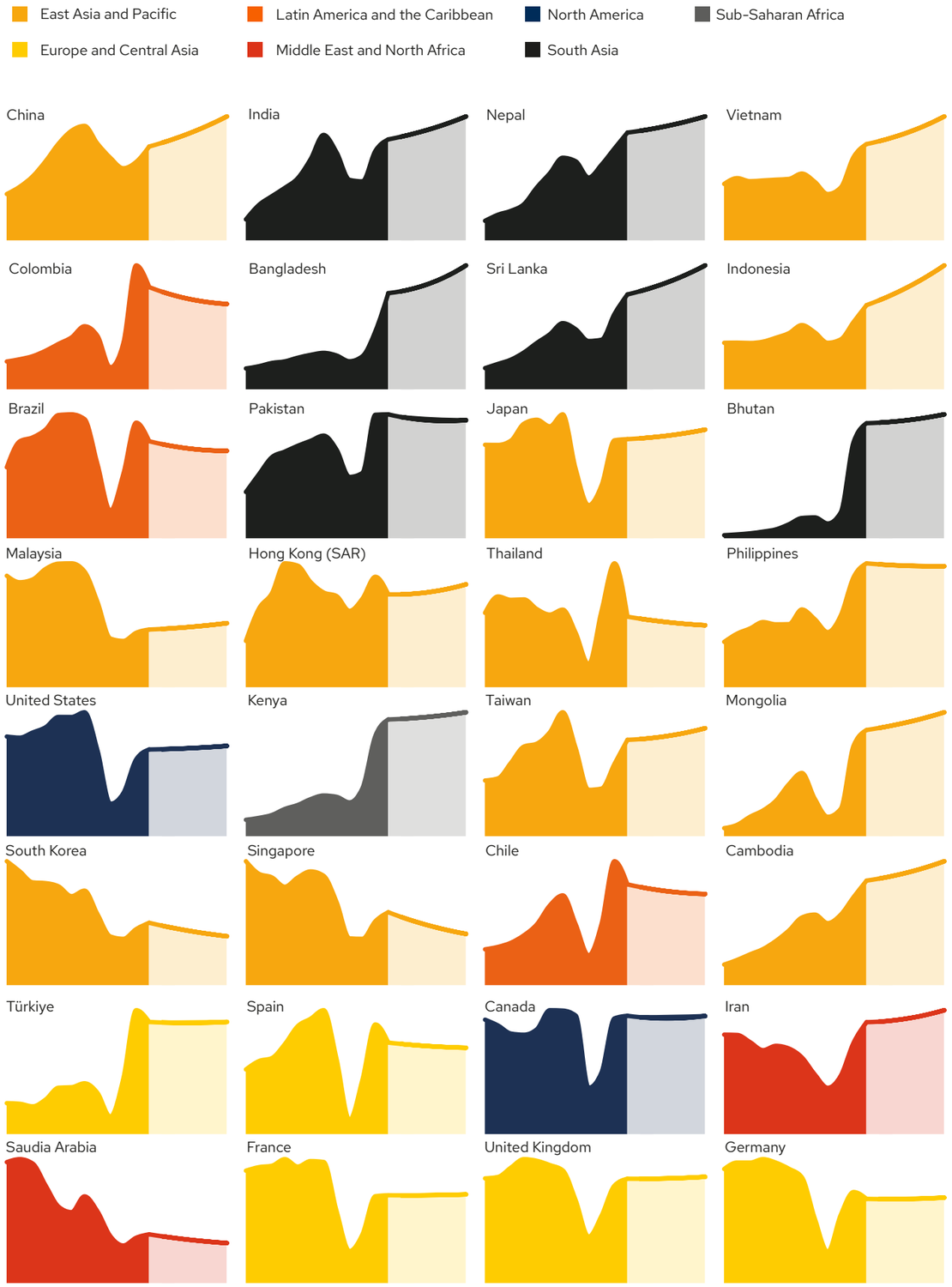
Unsurprisingly, China and India will remain the twin engines of growth. Combined, they already make up 43% of Australia's international student intake, and that share is set to rise to 46% by 2030. But the paths for each are diverging. China's numbers will be shaped by broader economic headwinds at home and the ongoing geopolitical recalibration. These very tensions - especially with the US - are likely to make destinations like Australia and the UK more attractive as a study destination. India, meanwhile, is experiencing strong demand, but Australian visa policies may become a constraint. The recently tightened Genuine Student Test (GST), for example, could act as a brake on growth from India and other South Asian markets.

The ramifications of such policy changes could be significant as they would affect a unique component of Australian higher education. Australian universities are significantly more diversified in where they enrol their international students from. In 2024, only 38% of their international students came from China or India, compared to 43% going to the UK and 54% to the US. Australian institutions recruit a far greater proportion of international students from secondary markets in Latin America, South and Southeast Asia. A likely impact of the Genuine Student Test would be to restrict those numbers coming from secondary markets meaning institutions would become more reliant on China and India for their students.

Beyond the top source markets, several Asian markets are gaining ground. Vietnam and Indonesia are expected to climb the ranks of the top source markets, while others like Brazil, Colombia, Thailand, and South Korea are seeing a slide, and have struggled to recover since the pandemic. This decline may reverse should the additional engagement with Southeast Asia be successful following Australia's 2026 National Planning Level increase of 25,000 places. Countries such as Brazil, Colombia, and Spain - where over 80% of students in Australia are enrolled in English courses - have also seen persistent drops in enrolment since 2024, with little sign of reversal. Japan, where English language students account for about 70% of outbound students to Australia, is on a similar trajectory.

NZ, though smaller in scale, is on a faster track compared to Australia, partly on account of its slower recovery from the pandemic so far. Apart from Africa and North America, all other regions have recovered to only 70% of 2019 levels so far, but the recovery is expected to pick up more quickly in the next few years. International student numbers in universities and English language schools are forecast to grow by around 5% annually through 2030, lifting enrolments from 38,000 in 2024 to roughly 50,000. Even so, this would bring numbers to just over 80% of the 2019 total. The projected growth rate is also lower than the 7% achieved between 2015 and 2019 and the New Zealand government's 8% growth target in overall international student numbers for 2024–2027.

Figure 4. Australia and New Zealand Major Student Origin Growth, 2013–2030F (Point Estimate Growth Outlook)



Source: QS Global Student Flows, August 2025

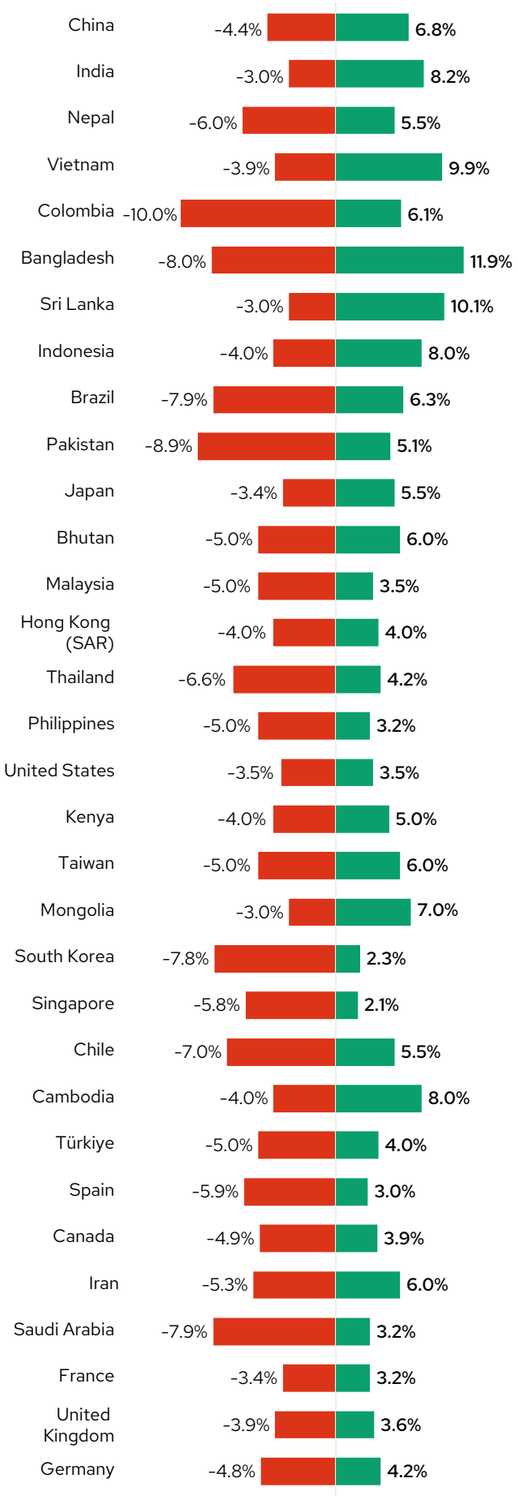
With a more open approach to students from South Asia and Africa, NZ could see an upswing in demand, particularly from countries like Sri Lanka, Vietnam, Brazil, and Colombia. That openness also positions it as an attractive alternative for students discouraged by tighter policies in Australia.

Demand for ANZ's English language sector remains soft. English language courses now make up just 30% of international students, down from 50% in 2000. Post-pandemic recovery has been slow - the Australian government increasing visa fees will not help with this price-sensitive market. The improving provisions of English language teaching globally may suppress demand further.

In 2000, when Australia hosted just over 100,000 international students, China accounted for 9% of the market. Now, it's around 30%. India has climbed from eighth to second place, with its share rising from 4% to 14%. In 2000, all but one of the leading markets were in East or Southeast Asia. Today, South Asian and Latin American countries have started to displace long-time regional partners like Malaysia (down nine spots), Singapore (-17), South Korea (-12), and Japan (-8).

Several of these countries, such as Indonesia and Malaysia, are attempting to build their own international education hubs. But with stronger economic fundamentals and growing middle classes, they still represent valuable source markets. Indonesia, once Australia's top sender, has shifted focus towards the UK. For Australia, re-engaging with these mid-tier markets could be key - especially as visa scrutiny places a cap on growth from South Asia.

Figure 5. Australia and New Zealand International Student Origin Growth Outlook. Lower and Upper 95% Confidence Intervals 2024-2030F



Source: QS Global Student Flows, August 2025

South Asia

Student flows from South Asia to Australia and NZ are projected to remain strong, supported by enduring demand for quality education in these markets. However, tightening visa regulations - such as stricter English proficiency requirements, increased visa application fees, and higher financial evidence thresholds - may act as barriers. Australia's more rigorous stance on verifying genuine student intentions could further limit growth, potentially affecting the ease and appeal of studying in the region.

This shift is already having an impact. India, the largest source market in South Asia and the second-largest overall for Australia, recorded a 4.5% drop in higher education visa approvals in the first half of the 2024–25 academic year. Despite this decline, demand from India will likely remain strong, driven by its large youth population and an expanding middle class with the capacity to invest in international education due to India's growing economy.

In South Asia, the majority of students are concentrated in Management and Commerce and IT courses. Most South Asians enrol in postgraduate programmes, but since the pandemic, the preference for undergraduate programmes has increased. Student numbers from Bangladesh and Sri Lanka to Australia grew strongly in 2024, driven by limited domestic university options and Australia's relatively affordable education compared to other Western destinations. This trend was reflected by the YoY growth, which reached 66% for Bangladesh and 25% for Sri Lanka, along with visa approvals in the first half of the 2024–25 academic year, rising by 27% and 14%, respectively. Despite this momentum, growth could moderate as Australia's stricter visa rules increase both the cost and complexity of the application process.

With the UK also tightening its genuine student checks and raising its Basic Compliance Assessment threshold, demand from South Asia to Australia and NZ is expected to remain strong. However, Australia's own stricter visa policies may limit the potential gains.

East Asia

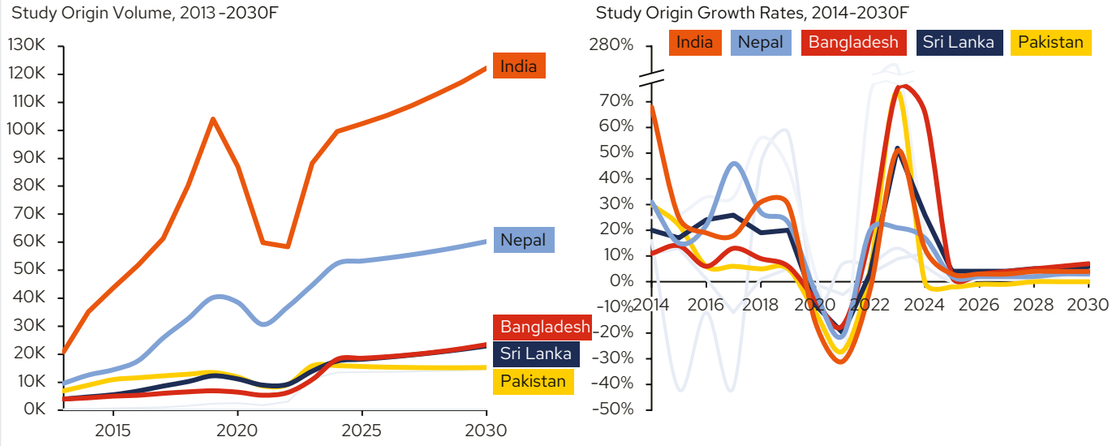
Student flows from East Asia to Australia and NZ are expected to grow and normalise over the next five years, with China continuing to be one of the fastest-growing student markets for both countries. This trend is supported by declining Chinese enrolments in the US, driven by ongoing trade tensions and the lasting effects of Trump policies. Canada has also capped international student intake, and the UK is becoming more expensive.

South Korea and Taiwan were also among the fastest-growing source countries for Australia in the early stages of the 2024–25 academic year, with student visa approvals for higher education seeing increases of 86% and 52% respectively, highlighting the region's increasing importance in Australia's international education sector. Across QS student recruitment partners, we are already seeing a 10% increase in offer holders from South Korea in 2025.

However, long-term demographic shifts in East Asia are expected to limit future growth, with countries facing ageing populations and declining birth rates. While short-term demand is likely to remain strong, in part because of declining student interest in the US, outbound student flows may slow going forward.

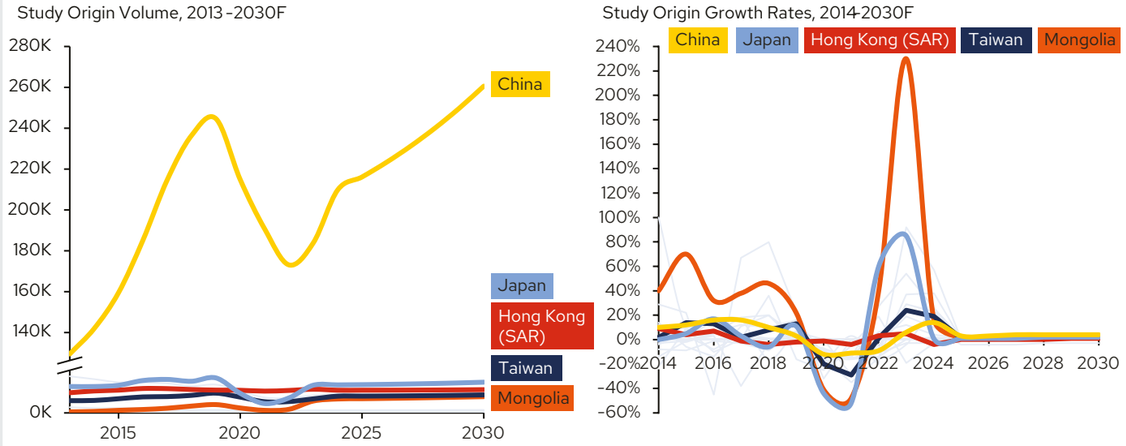
Japan's student flow to Australia is projected to slow significantly due to a combination of policy changes and economic pressures. A major factor is Australia's stricter English language requirements for international students, which significantly impact Japanese student outflows to Australia, of which 64% are English Language (ELICOS) programme students. Under new rules, even students planning to take ELICOS before their main course must now meet higher English proficiency standards. Escalating visa fees, rising to AUD 1,600 in July 2024 and AUD 2,000 from July 2025, disproportionately affect these short-term students, diminishing the affordability of studying abroad. Recent QS research highlighted that 49% of students interested in Australia were significantly impacted by the escalating visa fees and that 22% were less likely to apply to Australia as a result. These policy barriers are intensified by the weakening Japanese Yen against the Australian and New Zealand Dollars, further increasing the financial burden on Japanese families.

Figure 6. Australia and New Zealand Student Origin Growth, 2013-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

Figure 7. Australia and New Zealand Student Origin Growth, 2013-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

Africa

Student flows from Africa to Australia are expected to remain low, with African students consistently accounting for only 2% of total international enrolments. This is largely due to Australia's long-standing focus on Asian markets, shaped by historical and geopolitical ties, which has made access more challenging for African students. This trend is likely to persist in the coming years, as tighter visa rules and student caps further restrict opportunities.

Although the absolute numbers remain small, African student flows did show notable growth post-COVID. However, in the broader context of student inflows, this growth is modest. While percentage increases may seem significant, the actual student numbers remain limited compared to other regions. Economic volatility across many African countries can increase the financial burden on students and families, thus raising affordability concerns and harming visa approval rates.

Student flows from Africa to NZ are projected to increase, supported by the country's goal to double its international education sector to NZD 7.2 billion by 2034, with a targeted focus on regions including Africa.

Despite the challenges, demand from Africa remains moderately strong, driven by the continent's status as having the youngest population globally. With many African higher education systems struggling to accommodate this growing demand, more students are looking for study abroad opportunities. However, Nigeria, one of Africa's top five economies, tends to favour the US and the UK over ANZ, largely, due to closer geographic ties, more established migration pathways, and clearer post-study work and career opportunities. In the QS International Student Survey, students from Africa prioritise a welcoming environment, high-quality teaching and the option to gain visas after graduating when choosing where to study. Government legislation plays a crucial role on international student flows as a welcoming environment is largely articulated through the ease with which candidates can navigate visa systems within that country during and after their studies.

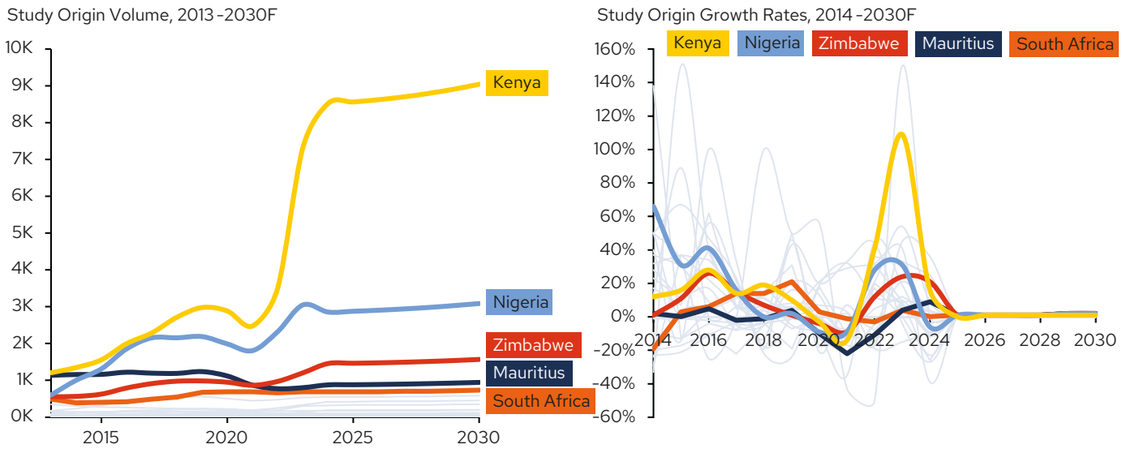
Middle East

Student flows from the Middle East to Australia and NZ are expected to gradually decline because of a mix of policy restrictions, shifting geopolitical dynamics, and regional development goals.

While the Middle East has historically shown lower outbound mobility to these destinations, improving visa approval rates, targeted scholarships, and growing interest in alternative study destinations beyond the US have opened up some new opportunities. However, this growth is expected to slow as several Middle Eastern countries work to position themselves as regional hubs for higher education. Governments are implementing stricter regulations for state-sponsored students and increasing investment in domestic universities to both reduce reliance on foreign education and encourage students to remain within the region. These stricter regulations impact Australia more than the US or UK because of Australia having fewer top-ranked universities. Additionally, there is a growing emphasis on encouraging students who do study abroad to return with skills and expertise that contribute to national development goals. On the other hand, Gulf students may be looking to Canada and Australia as a backup amid challenges facing universities in the US.

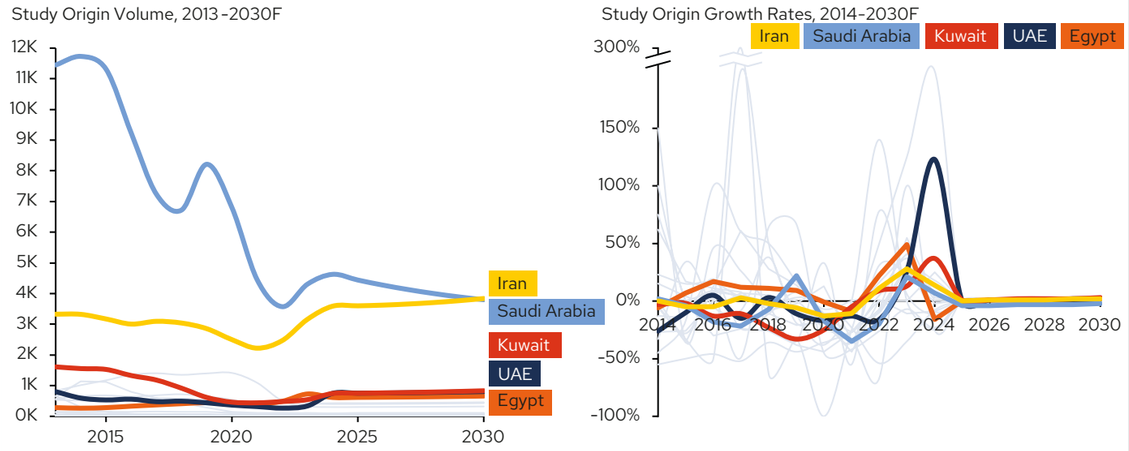
In terms of study areas, a significant portion of students from the region prefer to study engineering and related technologies, and management and commerce subjects. Middle Eastern students' preference for postgraduate studies has notably increased since the pandemic, with 70% of students studying postgraduate studies in 2024 compared to 56% in 2019. Despite tighter visa restrictions, Australia continues to approve student visas for Middle Eastern applicants at increasing rates, indicating a strong interest in attracting students from the region. NZ is also increasing its engagement, offering a range of scholarships across various fields to draw Middle Eastern students.

Figure 8. Australia and New Zealand Student Origin Growth, 2013-2030F
Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

Figure 9. Australia and New Zealand Student Origin Growth, 2013-2030F
Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

Latin America

After a rapid influx of international students coming from the Latin American region immediately after the COVID pandemic, the numbers are beginning to decline. This downward trend is expected to continue for the next few years before stabilising. Most of the students from the region are mainly coming from Colombia and Brazil. Historically, Latin American students in Australia have predominantly enrolled in ELICOS programmes; however, the number of students entering these programmes is now declining rapidly. While the United States and Canada remain the top destinations for Latin American students, the ongoing trade tensions in the US and international student caps in Canada are expected to redirect some of this demand to Australia, helping to stabilise the current declining trend.

A major reason behind the current decline in student numbers from Latin America is Australia's recent visa policy changes, particularly the sharp increase in visa application fees starting in 2024. Many Latin American students choose short-term ELICOS programmes, and the higher visa costs are making these programmes less attractive. Colombia, Brazil and Argentina which have more than 85% of students enrolled in English Language studies have seen enrolments plummet by more than 15% in 2024 with falling visa approvals indicating further declines. As a result, the ELICOS sector is now facing significant challenges, and adjustments to visa policies for short-term study programmes may become necessary to address the issue.

Meanwhile, the NZ government is aiming to double international student inflows, creating greater opportunities for students in the region. This year, Australia increased the minimum wage, and NZ raised the part-time work limit for eligible international students from 20 to 25 hours per week - changes that are likely to attract greater interest from students in Latin America. In the QS International Student Survey, 69% of students from the region prioritised being able to work while studying - the highest proportion of any source region. Overall, the expected trend is a short-term decline, with the possibility of recovery toward the end of the decade.

Southeast Asia

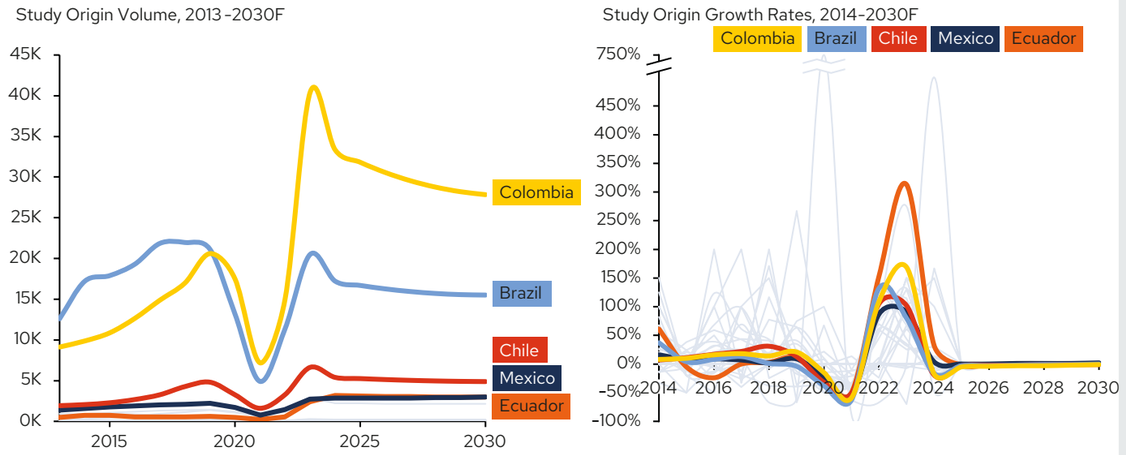
Student inflows from Southeast Asia (SEA) to Australia experienced steady growth until the sharp decline during the COVID pandemic, after which the numbers rebounded significantly. The region continues to be a major contributor to Australia's international student population. NZ is also focusing on the Southeast Asian student market to achieve its goal of doubling international student numbers. These combined efforts and trends help explain the projected upward trajectory in student mobility from the region.

In 2024, Vietnam was the leading source country from SEA to Australia, ranking 4th globally, followed by Indonesia (7th), Malaysia (14th) and Thailand (15th). While Vietnam sends the highest number of students from the region to Australia, its largest overall student outflow is directed towards Japan and the United States. Australia's recent increases in visa fees are likely to impact SEA students in English Language studies, particularly from countries like Thailand and Vietnam, which together account for about 10% of Australia's international ELICOS students.

Some SEA countries are seeing rapid development of middle and high-income populations. This growth is contributing to the increasing number of students seeking study abroad. Amid ongoing uncertainties around US immigration and education policies, Australia offers an attractive alternative. Favourable part-time work policies and high minimum hourly wages enhance this appeal. In 2024, QS research found that Australia's image as a study destination centred on a good quality of life and work opportunities - maintaining this perception will be crucial to long-term recruitment efforts in the region.

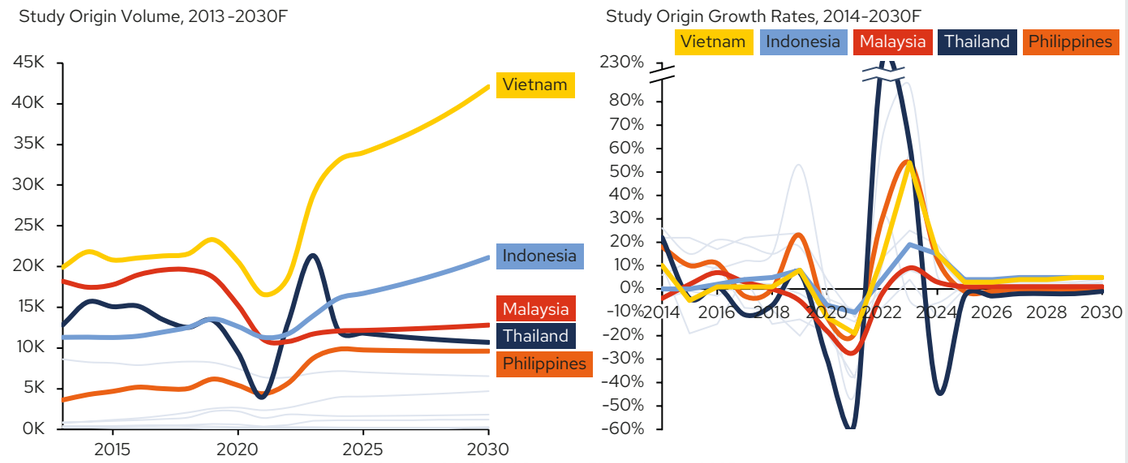
While student outflows from SEA are expected to keep rising in the near term, governments in the region are also focused on strengthening domestic higher education capacity. This includes hosting campuses of globally ranked institutions - such as Deakin University and Lancaster University in Indonesia, and Monash University in Malaysia - signalling a long-term shift toward more diversified and locally accessible international education options, which could limit student numbers going abroad in the medium to long term.

Figure 10. Australia and New Zealand Student Origin Growth, 2013-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

Figure 11. Australia and New Zealand Student Origin Growth, 2013-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

Europe

Student mobility from Europe to Australia remains relatively limited, but some Southern European nations have shown notable growth in the post-COVID period. Spain's numbers increased from 2,500 in 2022 to 5,000 in 2023, though still trail pre-COVID volumes. Türkiye's rise has been more sustained, reaching over 4,000 students in 2024 - well above the 1,800 recorded in 2019. These trends suggest a modest reorientation of European outbound mobility towards Australia, although other markets such as France, Germany, and the UK remain below pre-pandemic benchmarks. Early signs from 2024 suggest that the initial post-pandemic rebound is beginning to level off in countries like Spain and Türkiye, with a decline projected.

European students have traditionally gravitated toward destinations such as the UK, Germany, and other EU countries. However, rising competition, escalating costs, and increasingly restrictive immigration policies across parts of Europe may be prompting a shift in interest toward alternative destinations like Australia. Although European students still represent a small share of Australia's international student population, recent increases in German and Italian student visa grants in 2024 suggest a modest uptick in engagement. Nonetheless, policy changes, such as increases in visa application fees, may dampen momentum, especially among students from lower-middle-income backgrounds across the region.

Historically, student flows from Europe to Australia and NZ have been on a downward trajectory, with the region now comprising only 4% of all international students in both countries, compared to 9% in 2005. European students tend to favour disciplines like management and commerce, with notable enrolment in social sciences, humanities, and natural and physical sciences. The split between undergraduate and postgraduate enrolments among European students remains fairly even. As competition intensifies globally, sustaining Australia's appeal to European students will depend on maintaining a balance between attractive market conditions and policy stability, particularly in relation to cost and visa accessibility.

US and Canada

Students from the US and Canada are expected to remain a small share of Australia and NZ's total international enrolments, with numbers projected to stay largely flat. While there has been a recent uptick, the long-term downward trend is likely to persist.

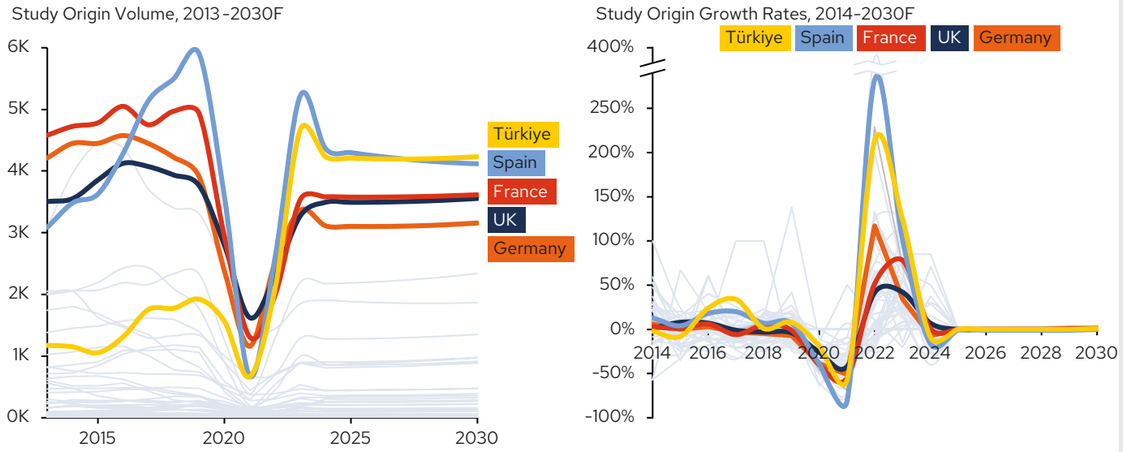
Flows from the US and Canada to the region have historically been limited and, for years, in decline as a share of total international enrolments. These markets were overshadowed by rapid growth from Asia, and Australia and NZ's institutions did little targeted outreach to North America. Most US and Canadian students opted for short-term study abroad experiences rather than full degrees, due in part to distance, limited awareness, and higher travel costs.

Recent data indicates a shift in momentum. Political uncertainty in the US may lead more students to consider studying abroad. Additionally, recent drastic cuts to visa grants for international students in Canada - significant reductions occurred in 2024 with further cuts planned for 2025 - could redirect some North American students towards Australia and NZ. Reflecting these trends, student visa approvals to Australia in the second half of 2024 increased, rising by about 35% for US applicants and over 15% for Canadians - positioning both countries among the fastest-growing source markets during this period.

While recent trends are positive, the underlying causes of the long-term decline remain, suggesting that the broader downward trajectory is likely to persist. In both the US and Canada, students have access to a wide range of high-quality universities at home - many of which are globally ranked and offer extensive programme options, strong alumni networks, and local job market advantages. For many students, especially those attending public institutions, the cost of domestic higher education - especially when factoring in financial aid - is significantly lower than studying abroad, making overseas degrees a harder sell.

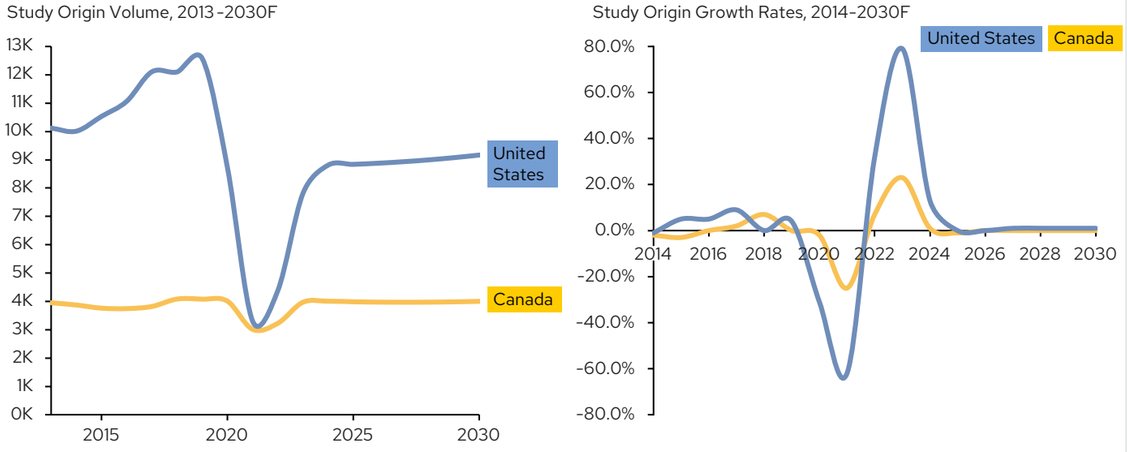
While short-term gains are encouraging, sustained growth from North America will likely depend on strategic investment and targeted engagement by institutions in Australia and NZ.

Figure 12. Australia and New Zealand Student Origin Growth, 2013-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

Figure 13. Australia and New Zealand Student Origin Growth, 2013-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, August 2025

City case study – Adelaide

Adelaide is emerging as one of Australia's most cost-effective destinations for international students. Despite accounting for just 6% of the national population with 1.47 million residents, it maintains a strong presence in the education sector for international students. While states like New South Wales, Victoria, and Queensland host a larger number of international students comparatively, South Australia recorded around 37,000 international students in the first four months of 2025. This is slightly lower than last year, marking a 2% drop, but Adelaide continues to attract students with its reputation for quality education and relatively low cost of living.

Adelaide ranks 31st in QS Best Student Cities 2026, placing it alongside other global education destinations such as Vancouver, Canada (ranked 29th), and Buenos Aires, Argentina (ranked 32nd). Adelaide is home to leading universities such as the University of Adelaide, part of Australia's Group of Eight and ranked 82nd globally by QS, and Flinders University, ranked 387th. Universities in Adelaide ranked by QS account for 7% of the total international student population in Australia. In 2023, legislation was passed in the State Parliament to establish Adelaide University, a merger of the University of Adelaide and the University of South Australia. The new institution is set to open in 2026.

Adelaide's appeal among international students is tied to its evolving economic landscape. South Australia's fastest-growing employment sectors include healthcare, construction, and education. Adelaide, historically known for its automotive industry, was once heavily reliant on manufacturing, which used to be the state's largest employment sector. However, manufacturing jobs have declined in recent years, largely due to increased automation.

Looking ahead, the state government sees strong job growth over the next five years in areas facing current shortages, such as nursing, IT management, human resources, construction management, software development, and civil engineering. With Adelaide having the oldest median age of any Australian state capital and the state seeing sluggish growth in its working-age population, there's growing demand for skilled workers in key industries.

India leads as the top source country in South Australia with just under 10,700 students, followed by China (7,361) and Vietnam (2,792). Indian students typically pursue postgraduate programmes in Information Technology, Management and Commerce, and Health, fields that align with broader trends among South Asian students and Adelaide's strengths in tech and medical sciences.

Chinese students show a strong preference for Management and Commerce, as well as Social Sciences and Humanities, choices that reflect Adelaide's creative industries. Vietnamese students, meanwhile, tend to enrol in undergraduate programmes in Management and Commerce and IT, favouring globally recognised, high-demand fields. Overall, QS International Student Survey data shows that students from Southeast Asia are more than twice as likely to consider Australia as a destination than students from elsewhere, indicating that Australia's "Invested: Australia's Southeast Asia Economic Strategy to 2040" is paying dividends.

A significant draw for international students is Adelaide's cost-effectiveness, especially when compared to larger Australian cities like Sydney and Melbourne. The cost of living is the biggest source of concern for prospective students looking to study in Australia, cited by 70% of respondents in the QS International Student Survey. Therefore, Adelaide's cheaper cost of living has the potential to significantly affect student decision-making. Average tuition fees for both undergraduate and postgraduate programmes in Adelaide are generally lower, particularly when compared to other Group of Eight universities.

Although Adelaide remains more affordable overall, recent months have seen one of the steepest increases in housing prices nationally, with supply shortages keeping the market tight. Some 48% of prospective students prioritise affordable rental accommodation when choosing where to live and 46% admit to having concerns about finding housing, which reiterates the impact that housing supply can have on student decision-making. Ensuring students can fully participate in the workforce will require addressing challenges such as migrant underutilisation. Long-term success will depend not only on maintaining cost advantages but also on ensuring international students can find housing and meaningful employment opportunities post study.

Australia and New Zealand outbound trends

Study abroad

Australian student mobility abroad includes both full-degree study and short-term experiences such as exchanges, internships, and study tours. Before the pandemic, outbound mobility was strong: about 58,000 students participated in learning abroad programmes in 2019, with short-term, credit-bearing programmes or exchanges making up the majority.

COVID disrupted these trends dramatically. By 2022, outbound mobility was only about 38% of its 2019 level, as border closures and health risks curtailed opportunities. Recovery began in 2023, with growing interest in short-term, flexible, and hybrid programmes that integrate well with domestic degrees. The UK, one of the top destinations for Australian students, only returned to pre-pandemic student numbers in 2024, reaching 2019 levels after several years of gradual recovery. The US, meanwhile, remains behind, with 2024 figures still at just 85% of what they were in 2019.

The most popular destinations remain the US, UK, and Europe, but students are increasingly choosing Asia Pacific locations such as Japan, South Korea or Vietnam for their affordability, cultural relevance, and regional career opportunities. Virtual exchanges and internships, developed during the pandemic, are now complementing physical mobility to make programmes more accessible and cost-effective.

Over the next few years, outbound student numbers are likely to gradually return to pre-pandemic levels, although formats and destinations will continue to diversify. Short-term, credit-bearing mobility is likely to dominate, aligned with students' needs for affordability, employability, and flexibility.

As Australia's outbound student mobility rebounds, it is likely to deliver broader benefits beyond individual learning outcomes. Stronger participation in global education networks helps elevate the country's profile as both a sender and receiver of international talent. Expanding outbound opportunities - especially to emerging destinations in Asia - can strengthen bilateral ties, promote institutional partnerships, and enhance Australia's visibility in key regions.

Transnational education

With migration policy under political pressure across much of the world, transnational education (TNE) may offer Australian universities a more stable path to global reach. Offshore campuses, which offer greater control over quality and branding, remain costly to operate; an issue that continues to limit their broader appeal. In 2023, more than 58,000 students were enrolled in Australian offshore partnership programmes (out of a total of over 115,000 students in all forms of TNE), reflecting the scale and reach of transnational education delivered in collaboration with local institutions abroad. Australian universities enrolled over 43,000 students at overseas branch campuses, marking roughly 1% annual growth since 2015. Asia dominates the landscape, with four of the top five host countries for Australian branch campuses, reflecting strong local appetite and long-standing institutional ties.

Australia's international education strategy increasingly focuses on collaborative partnerships and franchise arrangements with local providers, which have become the preferred model for delivering programmes abroad. These partnerships allow universities to extend their global footprint while sharing risk, leveraging local expertise, and maintaining high academic standards. While standalone branch campuses remain a feature of Australia's presence overseas, rising operational costs and market dynamics have curtailed their expansion. The ambitious branch campus model of the 1990s has given way to a more flexible, partnership-driven approach, complemented by rigorous quality assurance standards and targeted engagement in Asia Pacific markets. Australia's approach to branch campuses emphasises quality over quantity, with rigorous quality assurance standards, deep engagement in Asia Pacific markets, and responsiveness to local needs. This focused model has helped maintain relevance and appeal in competitive markets. However, rising costs have curtailed the expansion of offshore campuses, shifting the model away from the ambitious branch campuses of the 1990s towards more collaborative joint partnerships.

Globally, Australia is a significant provider of TNE, though it trails behind the United States and the UK. The US leads the sector through a network of about 100 partnerships and collaborative arrangements, including microcampuses, alongside a similar number of international branch campuses, which often target premium or niche markets. The UK also maintains a strong international presence, with over 300,000 students enrolled across branch campuses and partnerships - nearly 90% of whom are studying through partnership arrangements. Canada, while still limited to nine branch campuses, is expanding modestly through targeted partnerships in the Middle East, India, and China. NZ has a smaller branch campus footprint, focusing mainly on the Pacific Islands, with about 10,125 students enrolled offshore in total.

Looking ahead, the global demand for TNE is expected to grow steadily, driven by students seeking international credentials closer to home. To remain competitive, many countries including Australia will benefit from enhancing their branch campus offerings by integrating digital delivery, ensuring compliance with evolving regulations, and expanding selectively into emerging markets such as Africa and South Asia. Strengthening the value proposition of its branch campuses through innovative programmes and employability outcomes will be key to sustaining its position in the global landscape.

Online and hybrid programmes

Online TNE is an increasingly significant part of Australia's international education portfolio, allowing students overseas to earn Australian qualifications without relocating.

In 2023, about 12,875 students enrolled in Australian universities' offshore online or distance education programmes, representing roughly 11% of Australia's total TNE enrolments. Pre-pandemic, Australia's TNE was dominated by branch campuses and partnerships. However, COVID accelerated investment in digital delivery, leading to greater acceptance of online modalities among both students and institutions. Australian universities concentrate their online TNE efforts in the Asia Pacific, where time zones, cultural links, and demand for workforce-relevant programmes - such as business, education, IT, and healthcare - make them competitive.

Globally, Australia's online TNE remains smaller than the UK, which leads the sector with over 141,000 students in distance, flexible or distributed learning. The UK benefits from a mature regulatory environment and a long history of distance education. The US also delivers strong online TNE, especially in premium graduate and professional programmes, supported by robust platforms and global brand strength. Canada, while a smaller player, is growing its online and hybrid TNE through partnerships, particularly in India, the Middle East, and Africa.

To remain competitive, Australian universities are investing in high-quality, interactive online programmes and exploring hybrid models that blend digital learning with local experiences. These strategies aim to improve accessibility, student outcomes, and employability while extending Australia's reach into new and underserved markets.

Online TNE will continue to complement Australia's traditional offshore delivery, offering a scalable, innovative pathway to meet rising global demand for flexible and career-focused education.

The three scenarios for 2030

and how they impact Australia and New Zealand

Regulated Regionalism, where geopolitical fragmentation leads to strong intra-regional mobility and emerging destinations accelerate ahead.

Hybrid Multiversity, a world of blended, tech-enabled models that reshape where and how students learn, featuring a strong push towards transnational campuses.

Talent Race Rebound, a high-growth, globally competitive environment where nations aggressively seek international students as future citizens and workers.

Regulated Regionalism

Regulated Regionalism reflects a future in which Australia adopts a structured and centrally managed approach to international education, led by transparent national frameworks. This scenario was identified by experts at The PIE Live: Asia Pacific 2025 as the most likely to occur. Under this model, the government has implemented a national cap on international student enrolments, aiming to manage migration levels and alleviate pressure on housing and services. The policies give the government new powers to regulate enrolments by provider, course, or location.

Soft caps introduced in recent years remain in place, while the cost burden of the increased visa fees fall disproportionately on students in short-term programmes such as ELICOS, while those in longer undergraduate and postgraduate courses are relatively less affected. Together, these developments signal a shift toward a more interventionist stance in the governance of international education.

As enrolment becomes more selective, application processes would grow more rigid. Visa reforms with the introduction of the Genuine Student Test introduce stricter assessments of student intentions, academic goals, and financial readiness. Providers must demonstrate the relevance of their programmes to national skills strategies to secure and retain their enrolment allocations.

While demand for study in Australia remains strong, rising costs and regulatory complexity will lead some students, particularly from South and Southeast Asia, to consider alternatives closer to home. Countries like India, Malaysia, and the UAE ramp up their own higher education sectors and attract branch campuses from leading Australian universities, encouraging more intra-regional mobility.

ELICOS programmes evolve to support targeted education and migration pathways, while new credit recognition frameworks and bilateral agreements improve cross-border mobility. International education in Australia becomes less volume-driven and more mission-driven, aligned with national capacity, regional development goals, and long-term workforce needs.

This scenario reflects a future where student mobility is not unrestricted, but intentionally guided. Australia remains a major destination, but enrolment is increasingly selective, transparent, and aligned with broader national capacity and regional development goals.

Hybrid Multiversity

The Hybrid Multiversity scenario outlines a future where international students complete much of their education online or in their home countries before travelling to Australia for shorter, focused in-person experiences. These onshore components are tied to practical training, internships, or intensive English language programmes.

In this model, students start their studies offshore, either through online platforms or local partner institutions. Courses are aligned with Australian standards, and credit transfer systems ensure students can move smoothly between delivery sites. Universities formally recognise micro-credentials earned during early stages, allowing students to build qualifications progressively and giving employers early insight into their skills. Final-stage studies in Australia often include capstone projects or industry-linked experiences to help students transition into the workforce.

ELICOS courses also adapt by offering preparatory language learning through blended delivery. Students begin learning English remotely and travel to Australia to transition to immersive learning when academic study starts. Institutions reserve their physical campuses for activities that require hands-on learning such as lab work and employer engagement. Campuses are increasingly specialised, and digital infrastructure is strengthened to support offshore learners.

The government continues to back offshore delivery of Australian programmes and TNE partnerships, as a way to manage migration while maintaining international engagement. By offering qualifications through universities in South and Southeast Asia, Australia eases pressure on domestic infrastructure, builds a pipeline of skilled migrants, and generates revenue. These programmes also strengthen regional influence by fostering long-term academic and cultural ties.

Regional campuses are positioned as specialised hubs, and policy incentives may emerge to support hybrid enrolments as a way to manage migration and infrastructure pressure. The model presents a more affordable, flexible alternative to full-onshore degrees, but widespread adoption would require major reforms to Australia's visa and education frameworks.

Talent Race Rebound

Talent Race Rebound outlines a scenario in which international education becomes a strategic tool for addressing Australia's skills shortages and demographic challenges. After a period of tightened visa controls, the government, in this scenario, will reposition international education as a pathway to attract and retain younger, highly-skilled talent in priority sectors.

Under this model, Australia adjusts its policy settings to reflect a more targeted approach. While overall international student intake is being reduced, exemptions remain for priority groups such as research students, government-sponsored scholars, and those in high-demand fields like IT, healthcare, and advanced manufacturing. In these areas, enrolment caps are applied more flexibly, aligning education policy with national workforce needs.

Australia could also relax recent reforms, such as the reduction of the maximum eligible age for the Temporary Graduate visa. Post-study work rights will also be redesigned to align with a points-based migration system, where international graduates with Australian qualifications and local work experience earn additional points. This would incentivise students to pursue careers in sectors with critical skill shortages.

For international students, the appeal will be strong, offering recognised qualifications, clearer migration pathways, and growing opportunities for employment in critical industries. This approach is particularly attractive to families in countries such as India, Indonesia, Kenya, and Brazil, where studying abroad is increasingly viewed as a pathway to long-term stability and economic opportunity. QS research shows that getting a visa to work after graduating is one of the top three priorities for students from Southeast Asia, Africa and Latin America when choosing a country to study in.

At its core, this scenario reflects a pivot away from open-ended migration toward a more selective, outcomes-based model. International education will be positioned not just as an export industry, but as a pipeline for skilled migration. Students who meet specific criteria in age, language, and qualifications are seen as future contributors to Australia's workforce and economy.

Global Student Cities

Global student mobility is increasingly shaped by cities as much as by countries. Cities are where students reside, study, work, and build social and professional networks. They serve as the foundation for word-of-mouth influence, the formation of diaspora communities, and the development of institutional capacity. In practice, institutions do not recruit from "India" as a single unit; they engage with hundreds of distinct urban centres, each with its own demographic structure, infrastructure realities, industrial priorities, and cultural dynamics.

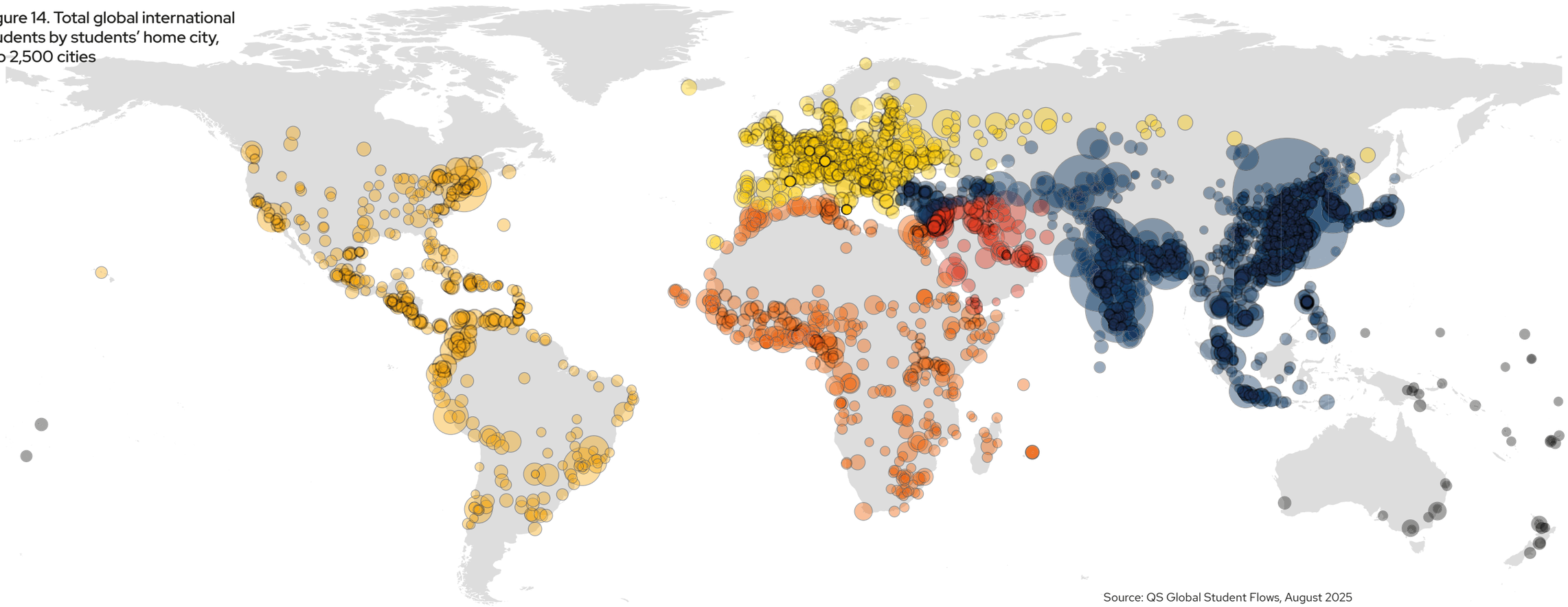
In recognition of this, QS is progressively expanding its Global Student Flows analytics from a traditional country-to-country matrix to a more granular city-to-city framework.

Building on the QS Best Student Cities ranking, our expanded dataset now includes over 2,500 cities worldwide, capturing more than 95% of international student origin and destination flows. The dataset encompasses every global city with a population exceeding 250,000, as well as a minimum of five cities for smaller countries. It also includes every city associated with the 7,000 institutions assessed in the QS World University Rankings. This refined approach reveals critical patterns often obscured at the national level, enabling distinctions between global megacities, regional gateways, and emerging urban education hubs. These urban nodes are increasingly central to the dynamics of global student mobility.

The map below visualises this expanded dataset, illustrating the global source cities capturing more than 95% of today's 7 million plus international students. It highlights, for example, rising talent centres in second-tier Chinese cities, innovation-led Gulf destinations, and African metropolises positioned to enter the global top 50 by 2030.

As competition intensifies and infrastructure pressures grow, city-level intelligence is essential. QS Cities Intelligence provides governments, institutions, and investors with the insights necessary to develop agile, targeted, and inclusive strategies for the future of international education.

Figure 14. Total global international students by students' home city, top 2,500 cities



Source: QS Global Student Flows, August 2025

Drivers for growth

How universities can beat the forecast

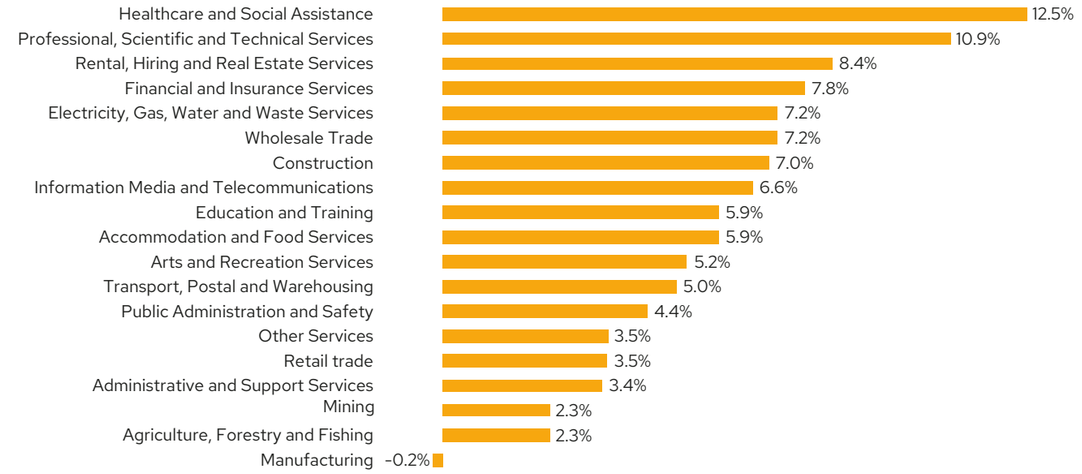
Labour market dynamics

Skills shortages are the real pull factor

The persistent skills shortages in Australia and NZ's workforce have been widely documented with the structural gaps creating a multitude of recruitment issues for local employers. Higher education has a critical role to play in addressing these skills gaps, as the Jobs and Skills Report 2024 notes that more than 90% of employment growth in Australia in the next ten years will require a post-secondary qualification. International talent will form a central component in closing those skills gaps, as the report also remarks that permanent skilled migration should aim to maximise Australia's long-term prosperity, not simply be a solution to meet short-term labour shortages.

While skills shortages are endemic across the Australian and NZ workforce, it's clear that persistent gaps will be concentrated in highly skilled sectors. According to Jobs and Skills Australia (Figure 15), the industries with the largest projected job growth over the next five years are Healthcare (12.5%), Professional Services (10.9%) Real Estate (8.4%) and Financial Services (7.8%). In some cases, the sector has responded effectively to meet future demand - there are 17 Australian universities ranked inside the top 100 in the world for Nursing, nearly twice as many as the UK, as one example. However, in others it's clear that institutions are not equipping graduates with the skills needed by employers.

Figure 15. Australia job growth by sector: Total 5-year % change to 2030



Source: Jobs and Skills Australia

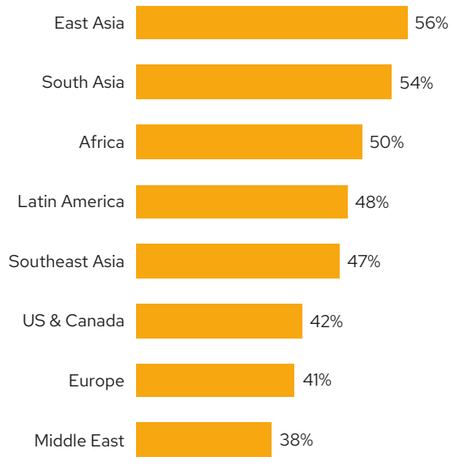
The impact of these labour market dynamics have already been felt. With the pace of skills change constantly accelerating it's vital that institutions are able to provide students with opportunities to practise and develop work-ready skills. However, as noted, the QS World Future Skills Index (Figure 16) shows both Australia and NZ are challenged when it comes to the satisfaction of employers with the skills of their graduates today. Australia scores lower than the US, UK, Germany, Canada, and Netherlands for the alignment of graduate skills with the needs of the labour market today. This skills mismatch is creating a productivity problem for the Australian workforce. According to the International Labour Organisation, output per hour worked for Australia currently trails that of the US, UK and the G7.

International education has an important role to play in supplementing these workforce needs and in driving productivity. As the Jobs and Skill Report 2024 notes, 'a strong skill focus to Australia's migration system can help to address changing workforce needs'. However, the report also states that whilst temporary migrants can play an important role in meeting short-term skills needs, there is scope to better use the skills and experience that migrants bring to Australia to drive further economic growth.

Universities in Australia need to respond in kind by building employability into their educational offerings and in making graduate outcomes a central pillar of their recruitment strategies. The demand from international students already exists, as the QS International Student Survey notes, future career considerations are one of the top four most important considerations for students when choosing what course they want to study. Not only that, but information on work placements and links to industry is the most sought after topic in marketing communications among students, with those from East Asia and South Asia exhibiting a concentrated interest on this topic.

By pivoting recruitment strategies to focus on employability, institutions can maximise conversion and align their recruitment with those sectors facing the largest skills shortages. To close skills gaps, NZ and Australia's institutions must work hand in glove with businesses to align the curricula to the needs of industry.

Figure 17. Marketing communication preferences. % of students selecting "Information on work placements and links to industry"

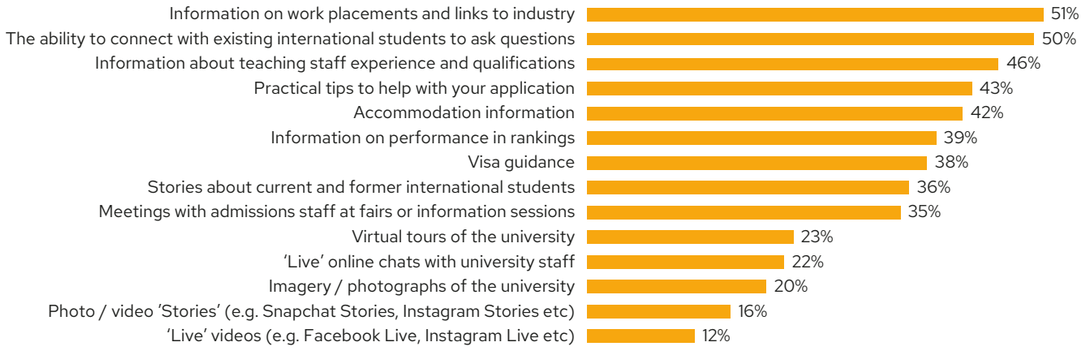


Source: QS Global Student Flows, August 2025

Figure 16. Skills Fit indicator.
Top 15 locations (normalised score out of 100)

Source: QS World Future Skills Index 2025

Figure 18. Preferred marketing communication topics
Which of the following are most useful to you when making decisions about your studies?
Students could select multiple



Source: QS Global Student Flows, August 2025

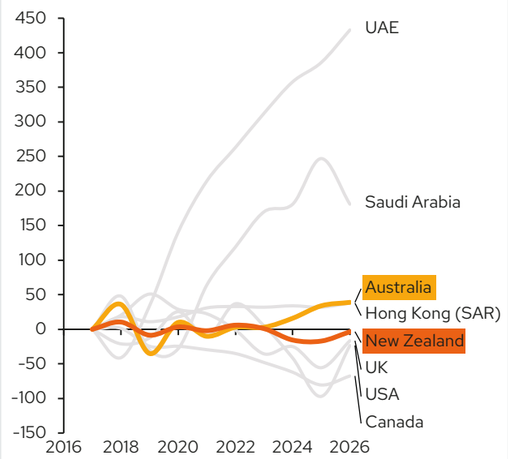
International student trends

Student decision-making increasingly driven by reputation

Reputation as a driver of student decision making is at a fascinating crossroads. While students increasingly look to reputation and career outcomes to make decisions, the reputation of institutions in NZ and Australia is declining or plateauing. The average Academic Reputation rank of all Australian institutions has declined from 436 in 2017 to 522 in the QS World University Rankings 2026 (Figure 19).

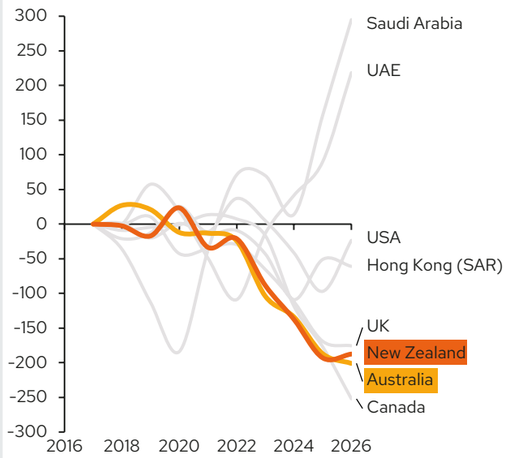
At the same time, there is a cohort of nations who have seen their reputation rapidly grow, but lack the capacity, infrastructure and career outcomes to become significant destinations. The United Arab Emirates, Saudi Arabia and Kuwait have all seen their top universities raise their Academic Reputation by 179, 124 and 201 places respectively. Brazil has also improved its average Academic Reputation by 90 places, with India rising by 29 places on average.

Figure 19. Change in median Academic Reputation Rank since 2017



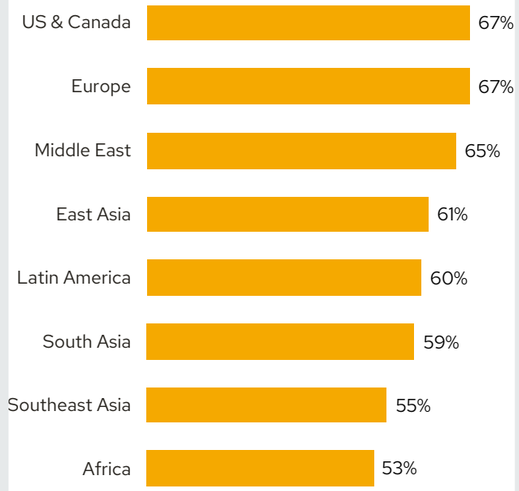
Source: QS World University Rankings

Figure 20. Change in median Employer Reputation Rank since 2017



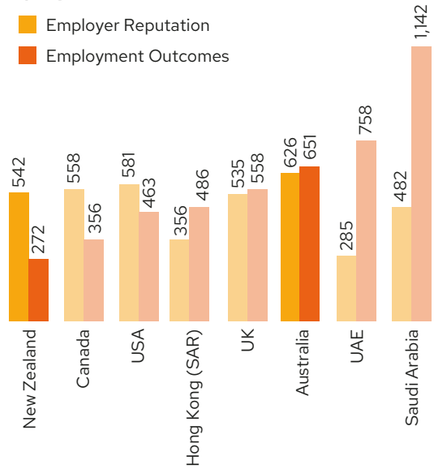
Source: QS World University Rankings

Figure 21. Importance of reputation to students when choosing a university



Source: QS Global Student Flows, August 2025

Figure 22. Average Employer Reputation Rank vs Average Employment Outcomes Rank



Source: QS World University Rankings 2026

The value prospective students place on an institution's reputation differs depending on where they are from (Figure 21). However, regardless of home country, reputation remains important for over 50% of students, further emphasising the challenges Australia and NZ institutions face with their declining and plateauing reputation.

When looking at all prospective students, that their studies lead to their chosen career has been one of the top three priorities when making decisions about which course to study for over five years. This should cause alarm among institutions in NZ and Australia, given the declining Employer Reputation seen since 2017. Without being able to show strong career outcomes, NZ's good work in building a positive perception may not be as impactful.

The reputation of institutions among employers is something which can be significantly influenced by the outcomes of its graduates (Figure 22).

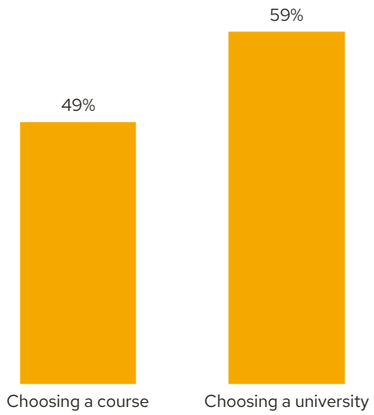
In New Zealand, institutions are able to deliver positive graduate outcomes, securing high graduate employment rates and producing graduates who have gone on to make a meaningful impact on society. Leveraging such successful narratives will be critical to reversing the decline in New Zealand's reputation among employers, which is currently significantly lower than its graduate outcomes would suggest.

In Australia, there is a markedly different story where Employment Outcomes for institutions are marginally worse than their reputation among employers. This reiterates the point that Australian institutions need to make graduate employability a core component of existing and upcoming curricula development. Ensuring that graduates have the appropriate mix of skills to meet the existing and future demands of local employers should be central to this strategy. In doing so, institutions can transform their capacity to become drivers of economic growth and enhance their reputation among employers.

Preserving, and, in some cases, rebuilding Employer Reputation will be critical to driving future inbound international student flows. The new competitive advantage is provable outcomes - constructing a compelling, quantifiable and data-driven narrative which speaks to the priorities of prospective students will be an increasingly essential component of institutional recruitment strategies. Some 59% of prospective students looking to study in Australia cite either subject reputation or overall institutional reputation as a priority when choosing a university.

Additionally, students draw an implicit association between reputation and ranking performance - 71% of students looking to study in Australia say that good performance in rankings is indicative of a good reputation. This is compounded by the fact that only 14% of students looking at Australia will prioritise an institution's rank without also prioritising reputation. Ranking performance is also the most important factor to students when gauging teaching quality at an institution, cited by 61% of students.

Figure 23. Importance of reputation to students when choosing a course and university



Source: QS Global Student Flows, August 2025

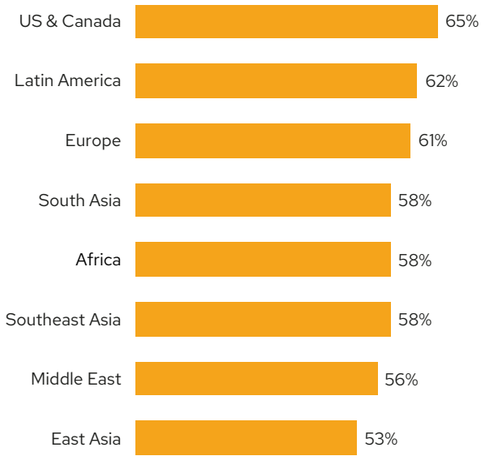
Employability is a vital consideration for prospective students

Post-study employment prospects are a vital consideration for most students - just under half prioritise their career path when choosing which course to study.

Information on work placements and links to industry is the most desired marketing communication strand for candidates looking to study in Australia. It's especially important to communicate this information to East and South Asia candidates who place higher importance on this than students in other regions. With over 150,000 students from South Asia projected to study in Australia and New Zealand by 2030, it's crucial for institutions to focus on this area if they are to grow.

The ability to learn new skills is the most important career consideration for candidates (Figure 24). They see their time at university as the best time in which to upskill and to learn how to articulate the value they can add to prospective employers with the skills they acquire there.

Figure 24. Career considerations when choosing a course. % of students selecting "It allows me to learn new skills"



Source: QS Global Student Flows, August 2025

A system under pressure

Battling for market share in a low-growth environment

Success is possible, but options feel limited

As we've discussed, international student recruitment in both Australia and NZ is expected to stagnate following a post-COVID boom period in Australia and a slower recovery in NZ, with forecast growth of 2% and 5% respectively.

With low growth, Australian and NZ institutions are going to be forced into a battle for market share, rather than working towards rapid expansion. Understanding this environment is key as universities also face calls for increased efficiency following rising costs, discounting course fees, and, in Australia's case, a turbulent policy environment.

Market consolidation and innovative models will likely further stabilise institutions financially and secure them for the future. Adelaide, as highlighted above, is seeing the merger of two of its universities as University of South Australia and the University of Adelaide join to form Adelaide University. The state government in Western Australia has also formed a committee to analyse the cost benefit of merging its four public universities into two institutions. Adelaide University is introducing a new model allowing students to embrace shorter, stackable credentials and programmes will have multiple exit points throughout the year, allowing students more flexibility.

TNE, as noted in our "Outbound trends" section, may offer a stable path to global reach but poses significant challenges that a low-growth environment does not complement. Operating branch campuses further dilutes revenue per student by offering lower cost education, and requires significant financial and labour investments. With resources squeezed, this may not be feasible, or present as risky given upfront capital investment requirements.

For institutions that do not consolidate or look for TNE opportunities, a likely path to increased market share is differentiation. Australian and NZ universities must look to bolster acumen in the factors that matter to students - reputation and graduate outcomes. While Australia's perception as a welcoming destination is beholden to government rhetoric, New Zealand has a real opportunity to differentiate from its neighbour and offer a welcoming environment with a simple visa process.

Strategic imperatives for 2030

At such an unpredictable time, educators need to be scenario planning in order to be best prepared to deal with what the future holds. Higher education institutions, business schools and learning providers have a history of creating long-term strategic plans to ensure they are sustainably viable and can continue stepping ahead with their invaluable missions.

This report cautions that the global education sector is facing unprecedented disruption from a wide array of factors. Global hiring slowdowns and employment shifts, long-term degradation of institutional reputation in Australia and New Zealand, heightened competition and demographic and economic challenges are just some of the dilemmas Australasian educators face.

Failure to manage the risks outlined in this report could result in our lower-end projections which show 580,000 international university and English language students in Australia and 31,000 in New Zealand. A decline of this magnitude could damage the impact of institutions across the region, their financial stability as well as the number of highly (and relevantly) skilled graduates entering the economies in both countries. However, as our baseline projections suggest, figures for Australia are set to rise by 2% annually to 770,000 in 2030 and by 5% in New Zealand, to reach 51,000 by the end of this decade. In an ideal situation, our top-end projections could grow to as much as 880,000 in Australia and 65,000 in New Zealand.

However, given the fluctuating landscape, key considerations for future strategies are:

Shift from volume to value:
Universities in Australia and New Zealand need to develop distinctive value propositions that resonate with increasingly selective international students. Being able to effectively communicate strong graduate outcomes and providing pathways to careers are key differentiators for institutions.

Align education with labour market gaps:
Students need to be able to articulate their value to future employers but concurrently universities need to ensure the skills their graduates leave programmes with are the same as those for which industry is calling out. QS analysis shows that Australia scores lower than the US, UK, Germany, Canada, and Netherlands for the alignment of graduate skills with the needs of the labour market today. Wide ranging programme portfolios focusing on labour shortages, curriculum co-designed with industry and work integrated learning will remain vital, and indeed need to be stepped up.

Rebuild reputation:
Despite prospective students increasingly looking to reputation when making study decisions, institutions across Australasia are seeing their reputations plateau or in many cases decline when compared with global competitors. Over the last decade, Australian universities have dropped on average by 238 places for Employer Reputation in the QS World University Rankings and NZ by 191 places. This is a cause for concern. Preserving and rebuilding reputations, especially among employers in markets where students come from, will be critical to driving future inbound international student flows.

Methodology

Global Student Flows

The Global Student Flows (GSF) initiative comprises three core components: QS' *Open Source Framework for Global Student Flows*, a proprietary *Flow Mapping* and *Analytics Technology*, and a *Scenario-Based Forecasting Methodology* designed to simulate over 4,000 discrete source-to-destination flows. Together, these instruments offer a comprehensive, 360-degree view of the global outlook for international student mobility.

Open source framework

The GSF framework integrates both qualitative and quantitative research within an open-source structure that supports the historical analysis and future forecasting of international student flows. The framework organises 15 core drivers of mobility into three overarching categories - push, pull, and disruption factors. These drivers form the analytical basis for assessing patterns in student movement and are reviewed and refined annually through expert consultation.

The qualitative research process is informed by extensive interviews with global experts, including economists, policy leaders, and institutional decision-makers. These contributors provide deep contextual insight into specific country-to-country flows, policy settings, and sectoral trends. Quantitative analysis is anchored in both historical datasets and current indicators, supported by HolonIQ by QS' proprietary global flows model. This model employs advanced analytics to simulate multi-factor, high-dimensional data across more than 4,000 unique international student flows.

By combining structured expert insight with data-driven modelling, the GSF framework delivers a robust, adaptive foundation for understanding the forces shaping global student mobility - past, present, and future.

Push factors	Pull factors	Disruption factors
Drivers of outbound mobility from source countries	Determinants of destination market attractiveness	Drivers of volatility and alternative mobility scenarios
Demographics	Academic quality	Geopolitical factors
Economic conditions	Post-graduation prospects	Place-based risks
Loans & scholarships	Affordability (inc. FX)	Capacity constraints
Domestic alternatives	Recruitment infrastructure	Hybrid programmes
Risk factors	Safety and security	Online learning

Push factors: Drivers of outbound mobility from source countries

Push factors refer to the underlying conditions within a student's country of origin that influence the decision to pursue education abroad. These drivers encompass a broad range of demographic, economic, educational, and geopolitical dimensions that collectively shape outbound mobility patterns.

Demographics
This factor analyses population trends and structures within source countries, including youth population growth, urbanisation, and educational attainment levels. Demographic pressures, such as a growing tertiary-aged population, are often strong predictors of increased outbound student mobility.

Economic conditions
The economic context of the source country directly impacts the capacity of individuals to finance international study. A slow economy, low gross domestic product (GDP) per capita, poor income distribution and overall household wealth can all motivate students to seek more prosperous environments abroad.

Loans & scholarships
The availability of financial support mechanisms such as scholarships, student loans and private funding options plays a significant role in enabling students to pursue study overseas. These instruments help mitigate affordability constraints and expand access.

Domestic alternatives
This factor assesses the quality, capacity, and perceived value of domestic higher education offerings. When local institutions are unable to meet student expectations, the likelihood of outbound mobility increases.

Risk factors
Geopolitical and geo-economic factors, and the environmental stability of a source country can reduce the attractiveness of remaining in-country, and contribute to students' aspirations of studying abroad.

Pull factors: Determinants of destination market attractiveness

Pull factors encompass the characteristics of destination countries that enhance their attractiveness to prospective international students. These include academic reputation, employment outcomes, cost, recruitment infrastructure, and overall safety and wellbeing. Together, these factors influence a student's decision to select a particular destination.

Academic quality
Academic quality refers to the presence of highly ranked universities and globally recognised academic programmes.

Post-graduation prospects
This factor examines the availability and attractiveness of work opportunities. It includes It includes the accessibility of internships, co-operative education programmes, and post-study employment pathways, especially those aligned with immigration or residency options.

Affordability (inc. FX)
Affordability encompasses the total cost of studying and living in the destination country. This includes tuition fees, living expenses, and currency exchange rates. Destinations that can offer an affordable study location tend to be more attractive to prospective students.

Recruitment infrastructure
This dimension assesses the effectiveness and maturity of international student recruitment systems. It includes agent networks, application processes, and institutional outreach and support throughout the student journey.

Safety and security
Safety considerations include physical security and student wellbeing. This factor evaluates the destination's political stability, health infrastructure, crime rates, and student support services. It also evaluates the destination's inclusivity and the presence of established diaspora communities.

Disruption factors: Drivers of volatility and alternative mobility scenarios

Disruption factors encompass external events and structural shifts that introduce volatility into international student mobility patterns. These variables can either constrain or accelerate mobility depending on their scale, duration, and impact. Key disruption factors include geopolitical developments, health and security risks, infrastructure limitations, and the emergence of alternative models of international education.

Geopolitical factors
This category refers to international and regional developments that influence policy decisions in both source and destination countries. Geopolitical tensions, diplomatic conflicts, and perceptions of political instability, particularly in key destination markets, can shape public sentiment, government regulation, and ultimately the volume and direction of student flows.

Place-based risks
This dimension includes disruptions tied to specific locations or global events that affect students' ability or willingness to travel. These include pandemics, armed conflicts, civil unrest, and natural disasters, as well as logistical challenges such as temporary flight suspensions or travel restrictions.

Capacity constraints
This factor encompasses limitations within destination countries that restrict the ability to accommodate international students. Constraints may include housing shortages, visa processing delays, limited institutional capacity, or insufficient support infrastructure. Conversely, improvements in these areas may significantly enhance student mobility.

Hybrid programmes
Hybrid delivery models, combining online and in-person components, represent an evolving alternative to traditional mobility. These programmes allow students to begin or complete their studies partially in their home country, offering flexibility and reducing the need for long-term physical relocation.

Online learning
Online learning offers a full substitute for in-person study, potentially reducing demand for international travel. As digital delivery becomes more sophisticated and accepted, it presents a disruptive force to conventional student mobility models.

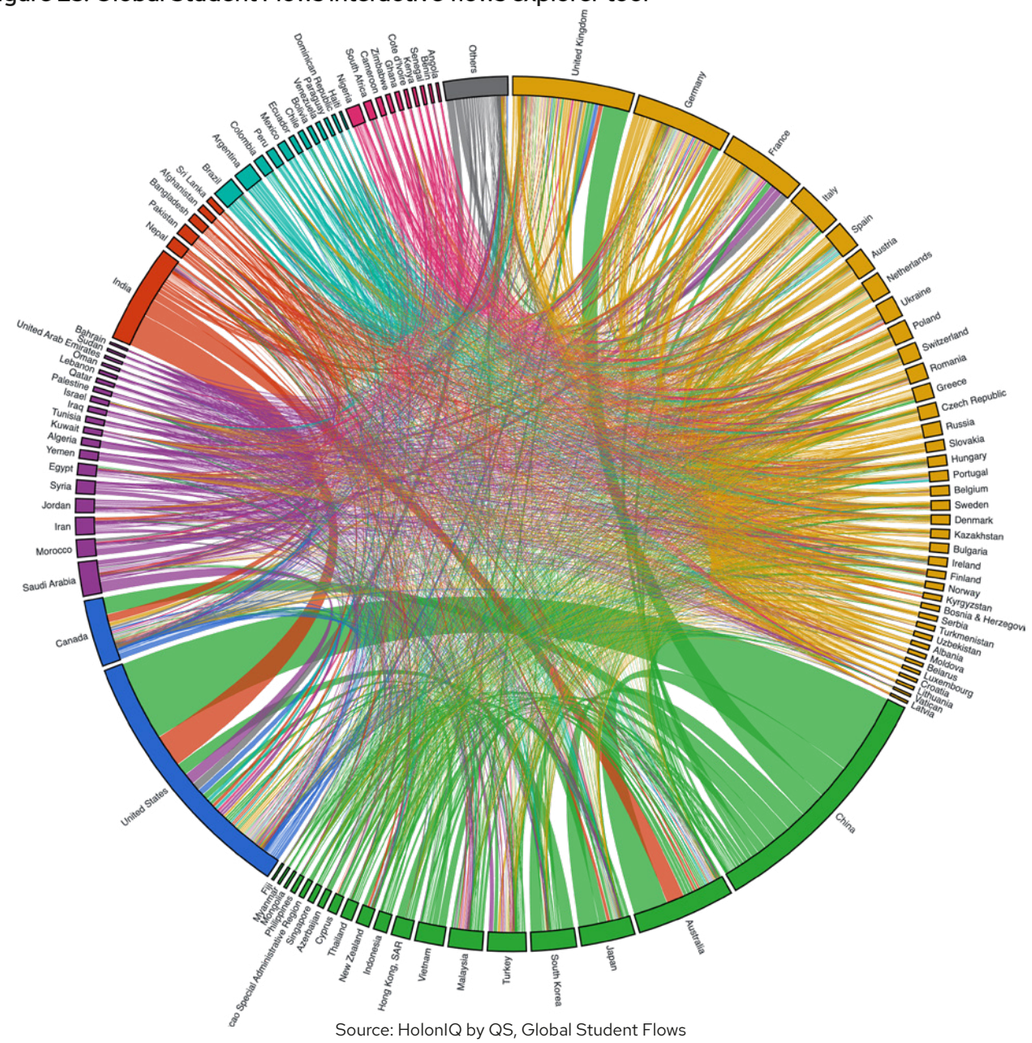
Mapping flows

HolonIQ by QS has developed proprietary technology to map and analyse the complexity of global student mobility and cross-border flows. Each year, over seven million students travel from more than 150 source countries to study in over 100 destination countries, representing more than 4,000 unique country-to-country flow patterns.

The platform enables users to analyse over 4,000 discrete flows over time, identifying trends and patterns that inform strategic planning, policy development, and investment decisions. The platform is designed to simplify the management, evaluation, and forecasting of international mobility and related datasets.

While the current focus of the Flows tool is on country-to-country education flows, the platform is progressively expanding to include subnational (state or province-level) and city-level resolution at both the source and destination ends.

Figure 25. Global Student Flows interactive flows explorer tool



Source: HolonIQ by QS, Global Student Flows

The GSF project employs a Monte Carlo simulation framework to forecast international student mobility across more than 4,000 discrete country-to-country flows. This simulation-based approach integrates probabilistic modelling with expert-informed qualitative research and quantitative machine learning to estimate future volumes under uncertainty.

As illustrated in the figure below, the forecasting model combines three core dimensions:

1. **Push factors** (source country conditions),
2. **Pull factors** (destination country conditions),
3. **Disruption factors** (external shocks and structural volatility).

Each factor is associated with a statistical distribution and confidence interval derived from a combination of primary expert interviews and historical quantitative data. Push and pull factors each generate growth rate distributions for every source and destination country respectively, while disruption factors contribute additional probabilistic shifts in overall flow volumes.

For each simulation run, randomised values are sampled from these distributions to produce one unique realisation of global mobility. The model executes one million iterations, Monte Carlo simulations, resulting in a distribution of total international student numbers and enabling robust scenario analysis.

While it is computationally intensive to model all 4,000+ flows individually, the GSF platform utilises detailed simulations for high-priority flows, while grouping long-tail flows under aggregated probabilistic assumptions. This balance allows for both granularity and computational efficiency.

Each iteration of the simulation refines the input parameters through enhanced expert consultation and data enrichment, ensuring continuous improvement of the model. As a result, the GSF Monte Carlo engine offers a dynamic, evolving, and academically rigorous methodology for anticipating the future landscape of international education.

Figure 26. Global Student Flows, open-source framework

Push factors		Pull factors		Disruption factors
Source country Confidence intervals & distribution curves	X	Destination country Confidence intervals & distribution curves	X	Disruption factor Probability & distribution curves
Primary research, expert interviews		Primary research, expert Interviews		Primary research, expert interviews
Quantitative analysis & machine learning forecasts		Quantitative analysis & machine learning forecasts		Quantitative analysis & machine learning forecasts

QS International Student Survey

The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2025 iteration draws on responses from over 70,000 students in 191 locations.

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 – 2025 is our 13th 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. Over the past three years, we've gathered crucial data on transnational education, sustainability and Generative AI.

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 146 universities globally, who were invited to share the Survey with their own prospective international students.

Fieldwork for the Survey was conducted between 6 January and April 7 2025, 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 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey respondent demographics

Figure 27. Subject preference

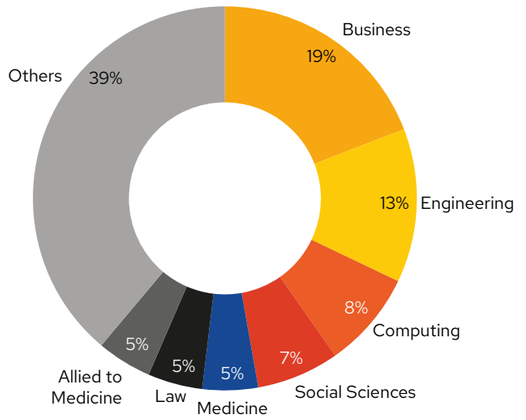


Figure 28. Study level

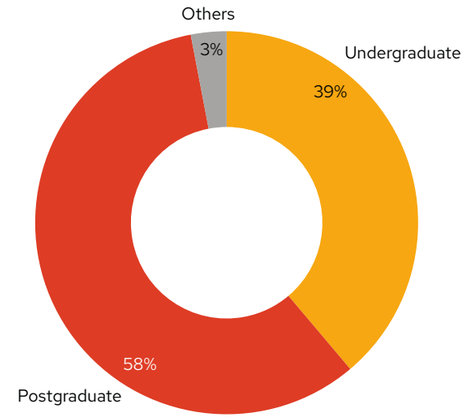
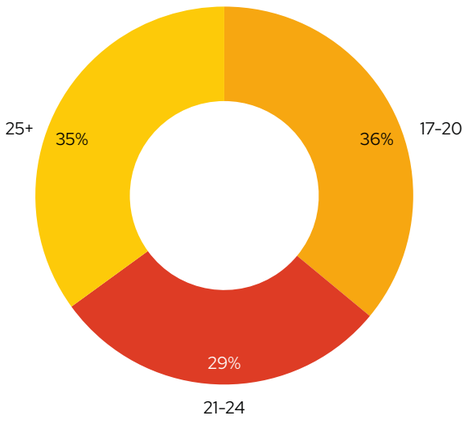


Figure 29. Age



Source: QS Global Student Flows, August 2025

Sources

The Global Student Flows model is built on a diverse and authoritative foundation of international data sources, ensuring high-quality, representative, and up-to-date insights into global student mobility. Drawing from multilateral agencies, national governments, statistical bureaus, and specialised education bodies, the model integrates both inbound and outbound mobility data across all major world regions. These sources reflect the latest available figures on enrolments, visas, migration, scholarships, and institutional capacity, and are harmonised to support robust forecasting and scenario analysis.

Key sources include:

UNESCO Institute for Statistics, 2023

World Bank Education Statistics, 2021

OECD, 2022

Eurostat, 2023

IOM Migration Data Portal, 2022

IIE Project Atlas, 2024

All India Survey on Higher Education (AISHE), 2021/22

Australian Government, Department of Education, 2023

Belgium Federal Public Service for Education, 2023

Campus France, 2023/24

Council of Higher Education (YÖK), 2022

Department of Higher Education and Training, South Africa, 2022

Department of Home Affairs – Australia Student Visa Data, 2024

Education Bureau, The Government of Hong Kong Special Administrative Region of the People's Republic of China, 2023

Education Malaysia Global Services, 2024

Education New Zealand (ENZ), Government of New Zealand, 2024

ETH Zurich, 2023

Federal Ministry of Education and Research (BMBF), 2024/25

Federal Ministry of Education, Science and Research, Austria, 2023

General Statistics Office of Vietnam (GSO), 2023

Government of Canada, 2023

Higher Education Commission (HEC), Pakistan, 2023

Higher Education Statistics Agency (HESA), 2022/23

Hungarian Central Statistical Office (KSH), 2022

Immigration, Refugees & Citizenship Canada (IRCC), 2023

Institute of International Education (Open Doors), USA, 2022/23

Japan Student Services Organization (JASSO), 2024

Ministry of Education, Argentina, 2023

Ministry of Education, Brazil, 2022

Ministry of Education, China, 2021

Ministry of Education, Columbia, 2023

Ministry of Education, Ghana, 2021

Ministry of Education, Singapore, 2023

Ministry of Education, South Korea, 2024

Ministry of Education, UAE, 2021

Ministry of Education & Science, Czech Republic, 2022

Ministry of Education and Science, Poland, 2023

Ministry of Education and Science, Uzbekistan, 2023

Ministry of Higher Education & Scientific Research (MESRS), 2025

Ministry of Higher Education, Morocco, 2021

Ministry of Higher Education, Saudi Arabia, 2022

Ministry of Higher Education, Science and Technology, Indonesia, 2023

Ministry of Higher Education, Tunisia, 2021

Ministry of Science & Higher Education, Russia, 2022

Ministry of University and Research (MUR), Italy, 2023

Ministry of Universities, Spain, 2022/23

National Universities Commission, Nigeria, 2020

Norwegian Directorate for Higher Education (HK-dir), 2022

Nuffic, 2023/24

Philippines Commission on Higher Education (CHED), 2023

Portugal Directorate - General for Education and Science Statistics, 2023

State Secretariat for Education, Research and Innovation (SERI), 2023

Statistics Canada, 2022/2023

Statistics Finland (Tilastokeskus), 2023

Statistics Norway (SSB), 2023

Statistics Sweden (SCB), 2023

Statistisches Bundesamt (Destatis), 2024/25

Student and Exchange Visitor Information System (SEVIS), 2023

Sub-Directorate of Information Systems and Statistical Studies (SIES), 2022/23

Swedish Higher Education Authority (UKÄ), 2022

Ukraine State Center for International Education, 2023

University Grants Commission, Bangladesh, 2023

Wissenschaft weltoffen, 2023/24

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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

Get in touch to find out more