



**Student mobility
and motivation:**

Australia

**Inbound student
perceptions**

Powered by the QS International Student
Survey and Global Student Flows

2026

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Foreword



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Australia has long held a powerful place in international higher education. As this report makes clear, its universities combine global recognition with a study experience shaped by quality of life, employability and a clear sense of destination appeal. For many students, Australia is not only a place to earn a degree, but a place to build confidence, experience and future opportunity.

That appeal now sits in a more constrained policy environment. Recent increases in student visa fees, higher post-study visa costs and tighter approval conditions have added both financial cost and uncertainty to the student journey.

The Australian government is deliberately slowing international student arrivals as part of a wider policy reset, with the National Planning Level held at 295,000 commencements for both 2026 and 2027.

Yet actual commencements are already below that level, falling 8% in 2026 and standing 13% below 2019 levels. For institutions, the immediate challenge is to recruit in a market where Australia's reputation remains strong but the path to enrolment feels more expensive, selective and uncertain.

This report brings together QS Global Student Flows forecasts and International Student Survey insight to support that work. It is designed to help Australian institutions move from broad market confidence to sharper, evidence-led action: choosing the right markets, addressing student concerns around cost and visas, shaping messages around value and outcomes, and building student journeys that retain trust from first enquiry to enrolment. At QS, we work with universities to turn these insights into practical recruitment strategy – if you would like to find out more, please contact us.



Turn insights into recruitment **results**

Find, engage and recruit more of your ideal students

How we can help:

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

1,500+

universities worldwide trust us to grow and diversify their student cohorts

14,000+

compliance checks delivered over the past five years

50,000+

students engaged through QS recruitment events

Discover what's possible with QS

[Explore our student recruitment solutions](#)



Australia: Market overview

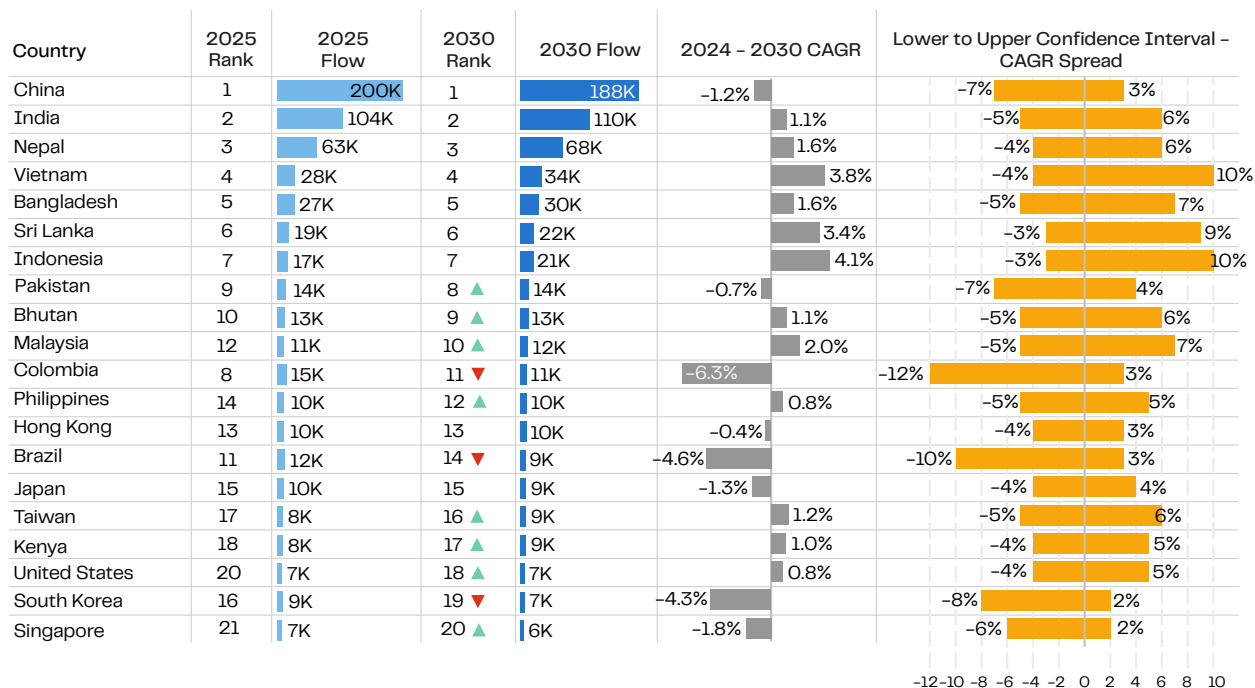
Hikes in student visa fees, alongside policy changes, represent a significant challenge to Australia's international student market, with three of the top source markets facing challenges. Student applications from China fell by 25% by the end of 2025, and both India and Nepal are seeing high visa rejection rates.

Inbound demand is expected to remain heavily concentrated in Asia, with China, India and Nepal continuing to anchor the market.

There are growth opportunities in certain South and Southeast Asian markets, but with visa applications rising, Australian institutions must not rely on this region alone. These markets offer practical diversification potential, but will require targeted positioning rather than broad recruitment activity.

Established source markets are expected to soften, underlining the need to avoid over-reliance on historic demand. For institutions, the task is to protect share in core markets while building clearer value propositions in growth markets where Australia's offer can still stand out.

Figure 1. Top 20 source countries to Australia, 2025-2030F



Source: QS Global Student Flows



[Read more in Global Student Flows: Australia](#)



Executive summary

Australia remains one of the world's most attractive study destinations, but this report points to a recruitment environment where institutions need a sharper understanding of how students make decisions. Destination appeal remains strong: students continue to value Australia's quality of life, welcome, employability and post-study opportunities. Yet that appeal now sits alongside greater cost sensitivity, policy uncertainty and stronger competition for mobile students.

Recent visa fee increases and tighter approval conditions underline why institutions cannot rely on destination reputation alone: they need to understand which students are still most likely to choose Australia, what concerns may hold them back and what messages can give them confidence to apply.

This report brings together QS Global Student Flows forecasts and International Student Survey insight to support that understanding. It combines market-level projections with student perception data, showing where demand is likely to come from, what Australia-bound students value, where perception gaps exist and how students use different information sources throughout the decision journey.

For institutions, the opportunity is to use this insight to protect share in core markets, identify selective growth opportunities and strengthen conversion. That means making Australia's value proposition easier to understand, addressing practical concerns around cost and visas with clearer information, and ensuring every student touchpoint reinforces the reasons to choose Australia.



Inbound trends

What do Australia-bound
students want from institutions?



Australia inbound trends at a glance

Where are students coming from?

Top source markets by 2030



What do they want to study?

Top subjects in 2026

#1

Business & Management 19%

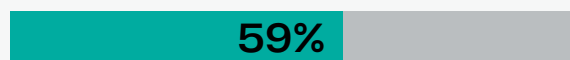
#2 Engineering and Technology 15%

#3 Computing 10%

#4 Subjects allied to Medicine 10%

What do Australia-bound students want?

Top decision drivers in 2026



Welcoming to international students



Availability of scholarships



Post-study work opportunities



Affordable cost of living



Affordable cost of studying

Fastest-rising factors since 2022

▲ Post-study work opportunities +7%

▲ Study visa access +5%

▲ Availability of scholarships +4%

▲ Recommended to me +4%

How quick do students expect responses?

8%

more students expect an application response within 24 hours than in 2022

Most influential information sources

75% Official university website

57% General online search

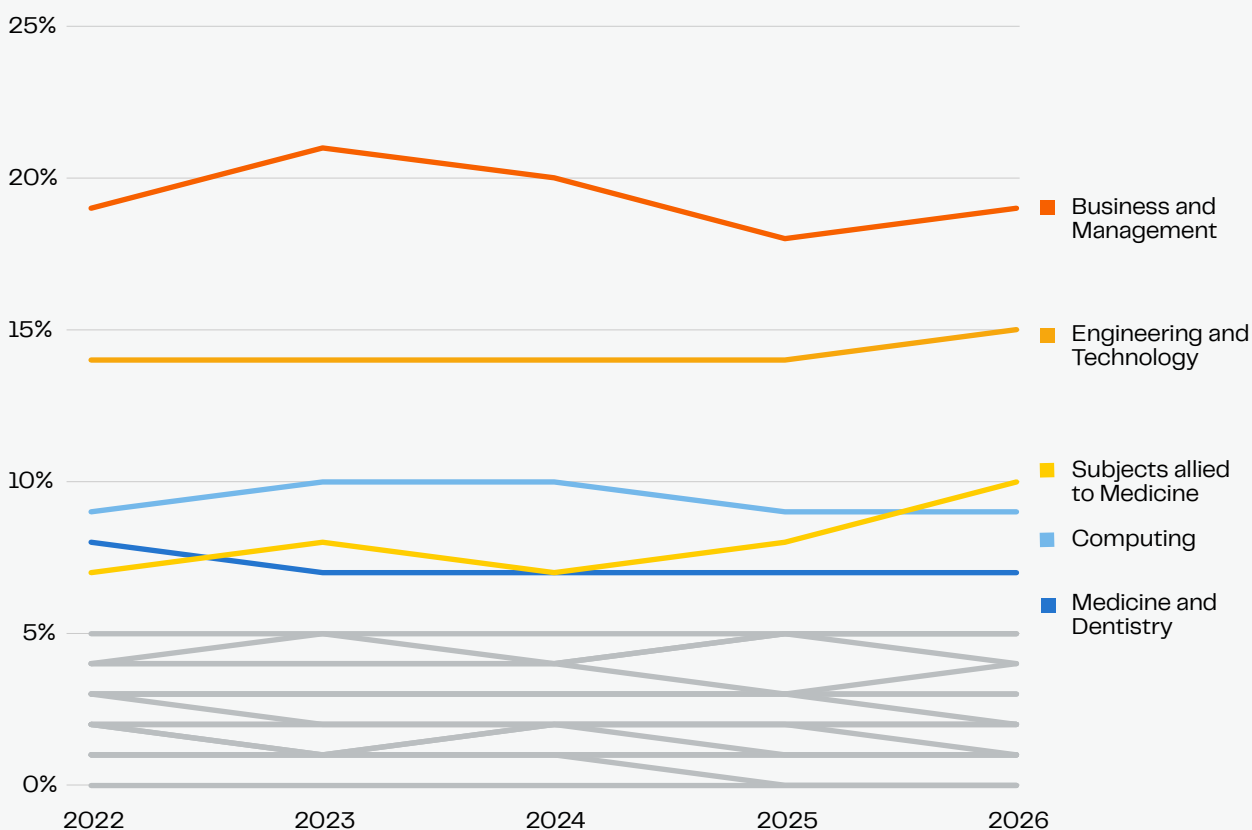
47% Social media channels

37% Rankings

Subject-level interest

Subject interest among Australia-bound students is relatively stable, but there are clear areas where demand is strengthening. Business and Management remains the largest subject area, accounting for 19% of interest in 2026, broadly in line with 2022 despite some year-to-year movement. Engineering and Technology has edged upwards to 15%, reinforcing Australia's appeal for students looking at technical and applied disciplines.

Figure 2. Australia inbound mobility: What do Australia-bound students want to study?



Source: QS International Student Survey

The most notable growth is in Subjects allied to Medicine, which has risen from 7% in 2022 to 10% in 2026. This suggests growing appetite for health-related pathways beyond Medicine and Dentistry itself, where interest has remained steady at 7%.

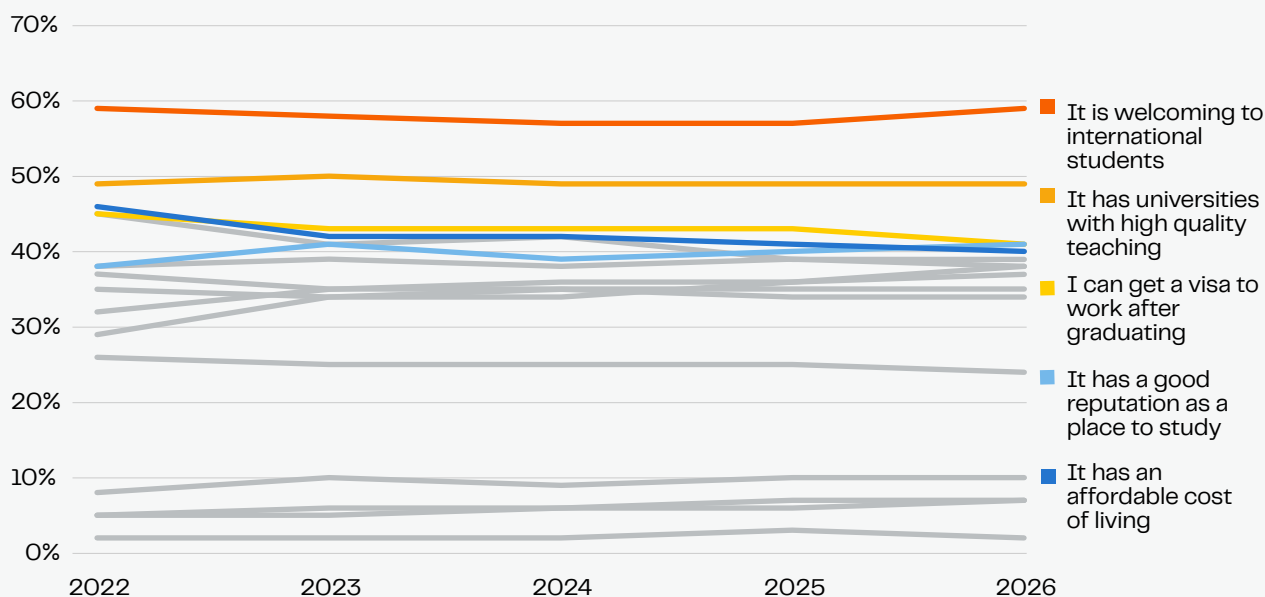
With many subject areas remaining stable, but in relatively low demand, the opportunity is less about chasing dramatic shifts and more about sharpening subject-level positioning. Australia's strongest areas of demand are concentrated in commercially and professionally oriented disciplines. Messaging should therefore connect course choice to employability, industry links, practical experience and post-study outcomes, while ensuring growing fields such as allied health are visible in recruitment campaigns.

Key questions to consider:

- Are you differentiating your subject messaging around Australia's strongest areas of demand, including business, engineering, computing and health-related disciplines?
- Is your programme portfolio and campaign focus aligned with where Australia-bound student interest is growing, particularly in allied health and professionally oriented subjects?
- Are you using subject-level demand data to show clear links between course choice, employability, industry connections and post-study outcomes?

Factors that drive students to Australia

Figure 3. Australia inbound mobility: Important factors when choosing a country



Source: QS International Student Survey

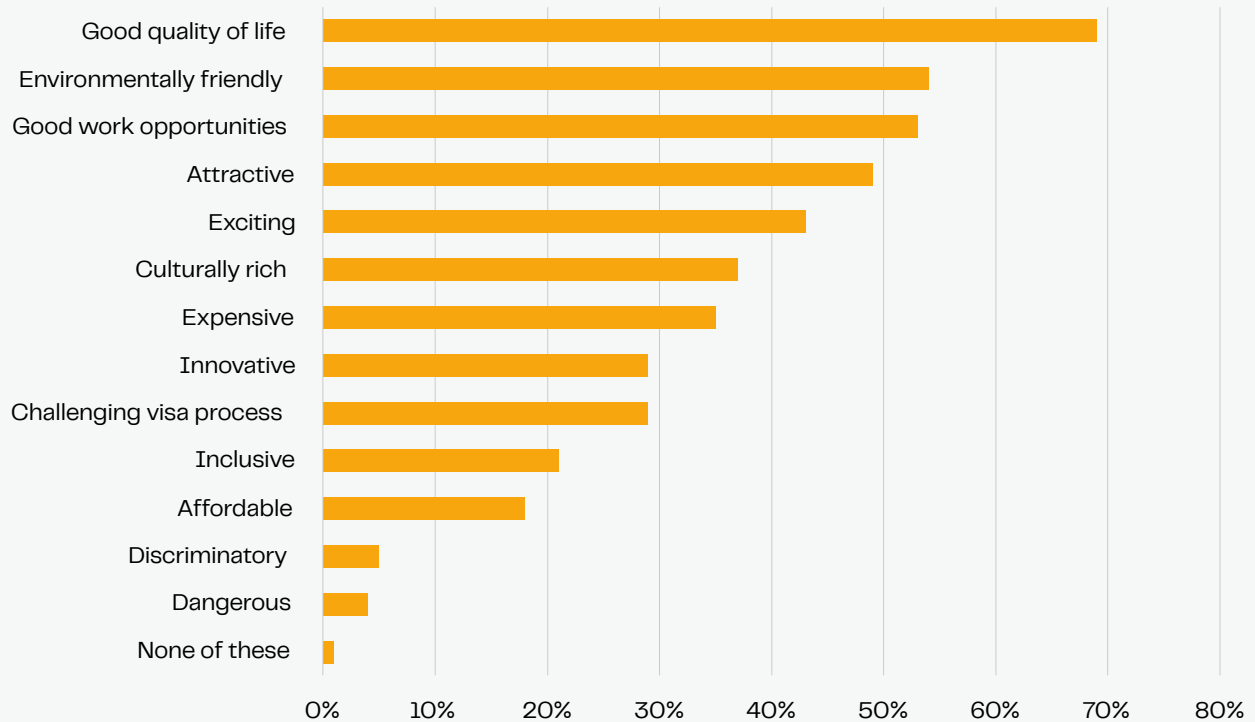
Australia-bound students want many of the qualities that Australia is already strongly perceived to offer. The most important factor when choosing a country is that it's welcoming to international students, selected by 59% in 2026. Australia's wider perception profile supports this, with 69% associating the country with a good quality of life, 54% seeing it as environmentally friendly and 49% describing it as attractive. With international students not set to rapidly increase, Australian institutions must leverage this positive perception to encourage new international mobile cohorts.

The challenge is that this positive lifestyle appeal sits alongside clear concerns about cost and access. Affordability remains one of the most important factors in country choice, with 40% citing affordable cost of living and 39% citing affordable cost of studying in 2026.

Yet only 18% perceive Australia as affordable, while 35% describe it as expensive. Similarly, while 35% of Australia-bound students say getting a study visa matters and 41% value post-study work access, 29% perceive Australia's visa process as challenging.

This creates a clear messaging task for institutions. Australia is already associated with quality of life, environmental appeal, attractiveness and work opportunities, with 53% perceiving it as offering good work opportunities. These are all qualities students actively value when choosing where to study. The opportunity is to connect these strengths more directly to the decision journey, while addressing perceived barriers around affordability and visas with practical, evidence-led information.

Figure 4. International students' perception of Australia



Source: QS International Student Survey

The strongest positioning will bring Australia's lifestyle, employability and reputation story together. Students are not choosing a destination on one factor alone: they are weighing welcome, quality, cost, work opportunities and long-term value. Institutions that make this trade-off easier to understand are more likely to convert interest into applications.

Affordability remains one of the most important factors in country choice, yet only 18% perceive Australia as affordable cost of living and 39% citing affordable cost of studying in 2026. Yet only 18% perceive Australia as affordable, while 35% describe it as expensive. Similarly, while 35% of Australia-bound students say getting a study visa matters and 41% value post-study work access, 29% perceive Australia's visa process as challenging.

Key questions to consider:

- How clearly are you connecting Australia's perceived strengths – quality of life, attractiveness, sustainability and work opportunities – to the factors students say matter most?
- Where do you need to address perception gaps around affordability and visa complexity with clearer, more practical information?
- Are you making Australia's value proposition tangible enough by linking lifestyle, student support, employability and post-study opportunities in one coherent story?



The sources of information students use to make decisions

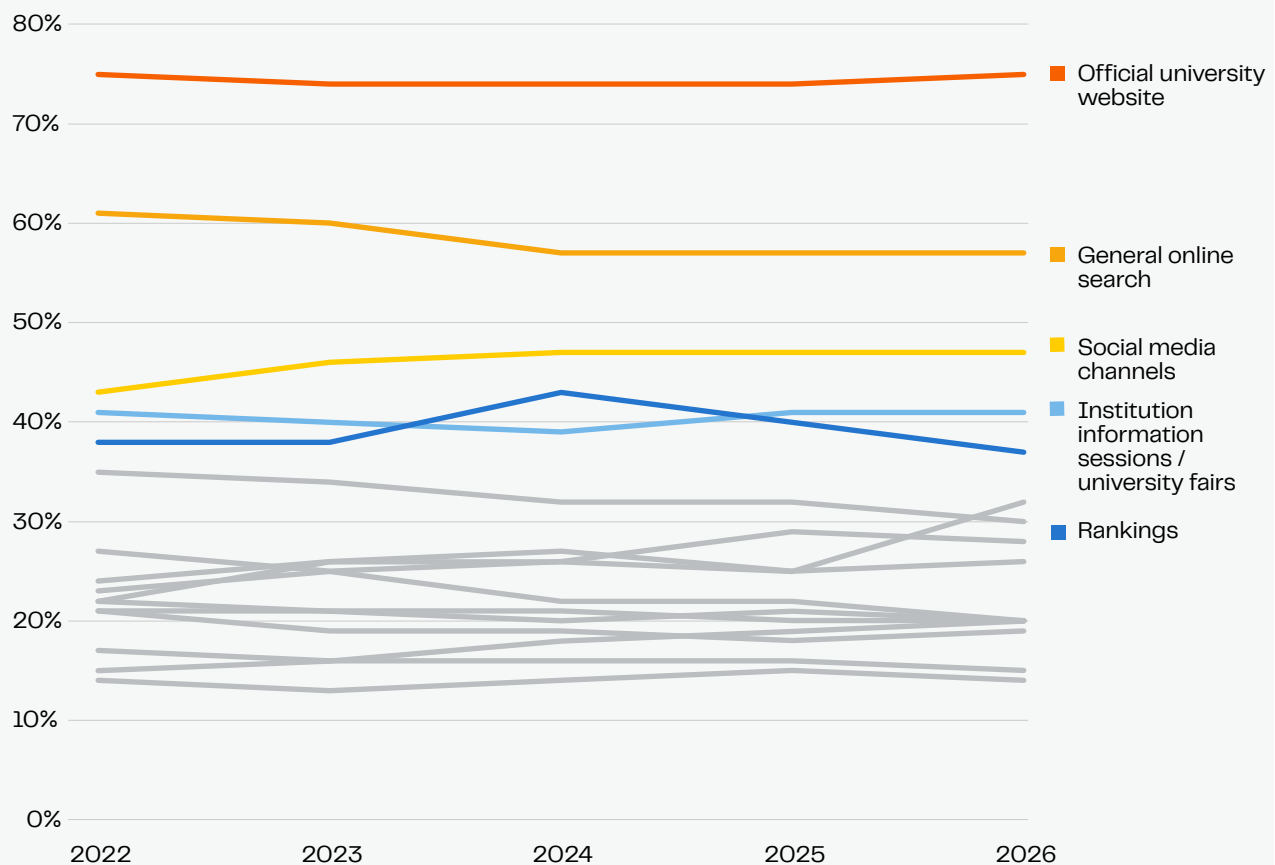
Official university websites remain the dominant source of information for Australia-bound students, used by 75% in 2026 and broadly unchanged since 2022. General online search also remains important at 57%, although it has declined from 61% in 2022. This reinforces the importance of strong owned digital channels. Despite the rise of AI, students still expect university websites to be the most reliable source of course, admissions and destination information.

Social media continues to play a major role in the research journey, rising from 43% in 2022 to 47% in 2026. At the same time, independent agencies, consultants and

education agents have become significantly more influential, increasing from 22% to 32% over the same period. This suggests Australia-bound students are combining institutional information with peer, social and third-party guidance as they narrow their options.

Other sources are either stable or becoming less influential. Rankings remain relevant at 37%, but have fallen from their 2024 peak of 43%, while course-finder websites have declined from 35% in 2022 to 30% in 2026. For institutions, the priority is to make sure the information students find across owned, social and agent-led channels is consistent, current and persuasive enough to support conversion.

Figure 5. Australia inbound mobility: Information sources



Source: QS International Student Survey

An Australian institution's recruitment story therefore needs to work across multiple touchpoints. A strong website remains essential, but it cannot carry the journey alone. Social content, fairs, agents, alumni and admissions teams all need to reinforce the same core messages around course value, student support, employability and life in Australia.

Key questions to consider:

- Is your official university website doing enough to answer Australia-bound students' core questions on courses, admissions, visas, costs and outcomes?
- Are your agents, consultants, fairs and admissions teams reinforcing the same messages students see through your owned digital channels?
- How effectively are you using social media and alumni voices to build trust, answer practical questions and move students closer to application?

Student conversion and communication

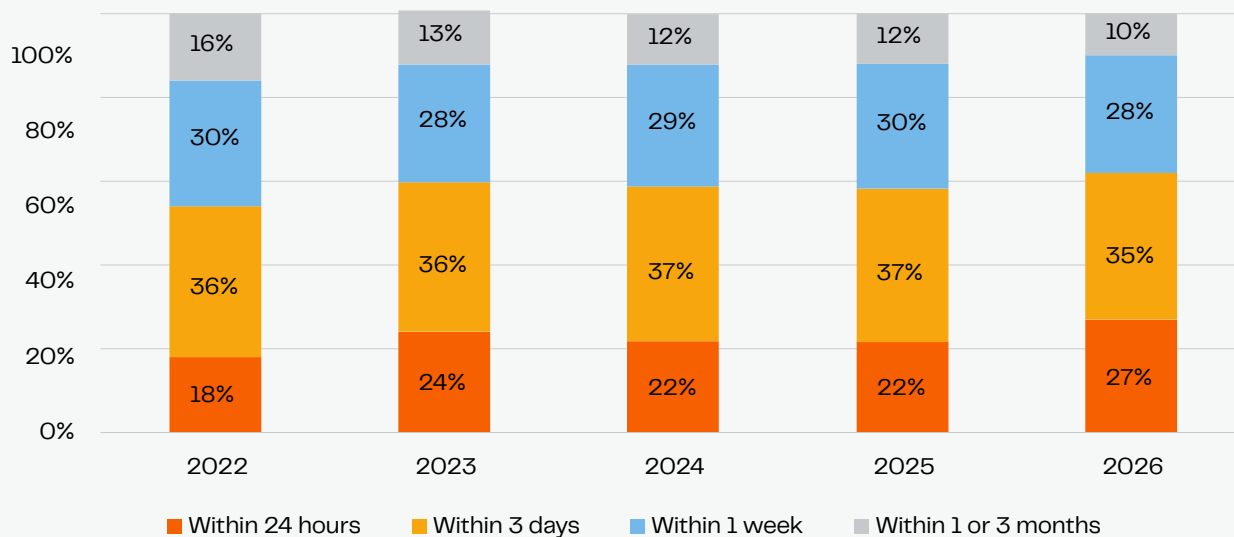
Student expectations for rapid communication are rising at the same time as application behaviour becomes more competitive. Half of prospective students are considering five or more universities, with 10% considering more than ten. Institutions are therefore competing not only on reputation and programme offering, but also on responsiveness. As students compare an increasingly crowded field of options, speed and personalisation can play an important role in keeping applicants engaged.

Fewer students now consider three days an acceptable wait for a personal response to an enquiry or application, while the share expecting a response within one day continues to rise year-on-year across contact types. In 2026, 8% more students expect a response to their application within 24 hours than in 2022.

Key questions to consider:

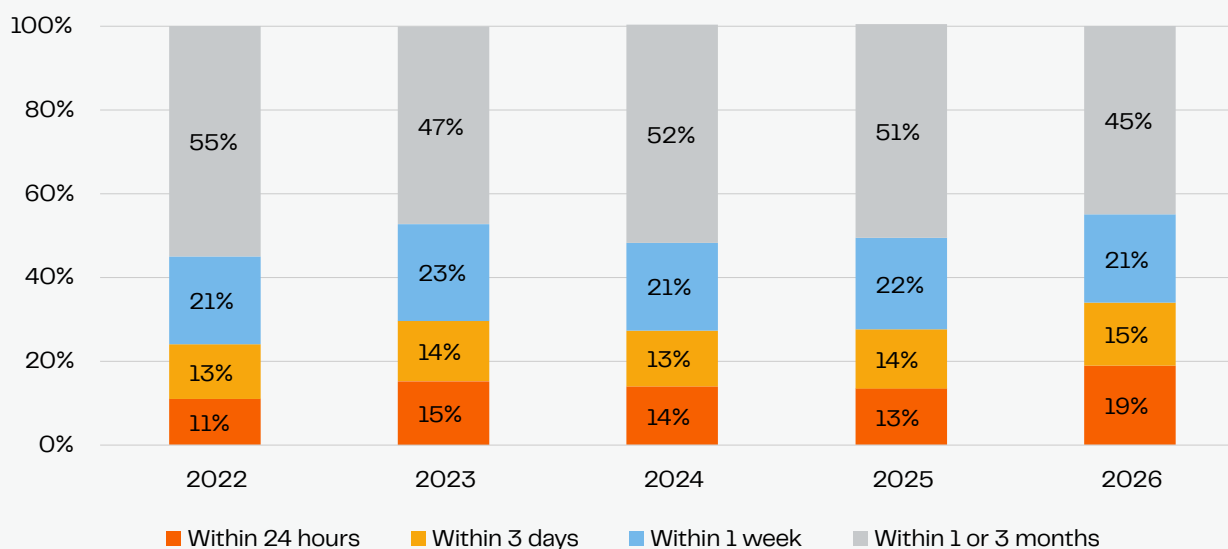
- Are your enquiry and admissions teams able to respond quickly enough to meet rising student expectations, especially for applicants comparing multiple institutions?
- Where could automation, clearer triage or more personalised follow-up help you reduce response times without weakening the quality of communication?
- Are you using responsiveness as part of your conversion strategy, making timely, relevant communication a visible strength throughout the applicant journey?

Figure 6. Expectation of complete and personal response to enquiry



Source: QS International Student Survey

Figure 7. Expectation of application outcome notification



Source: QS International Student Survey

Methodology

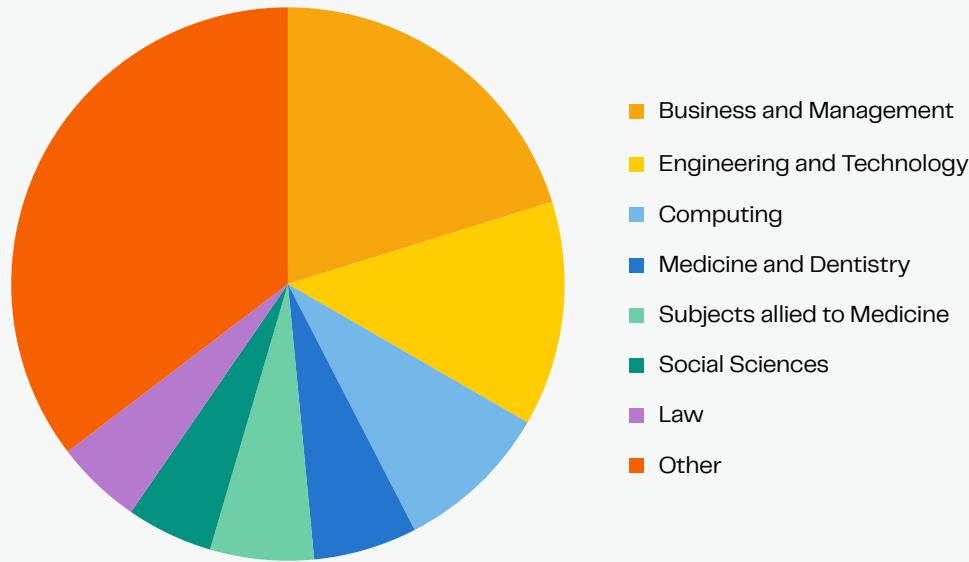
The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2026 iteration draws on responses from over 42,115 students in 191 locations, and this report uses over 500,000 responses from the past 5 years.

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

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

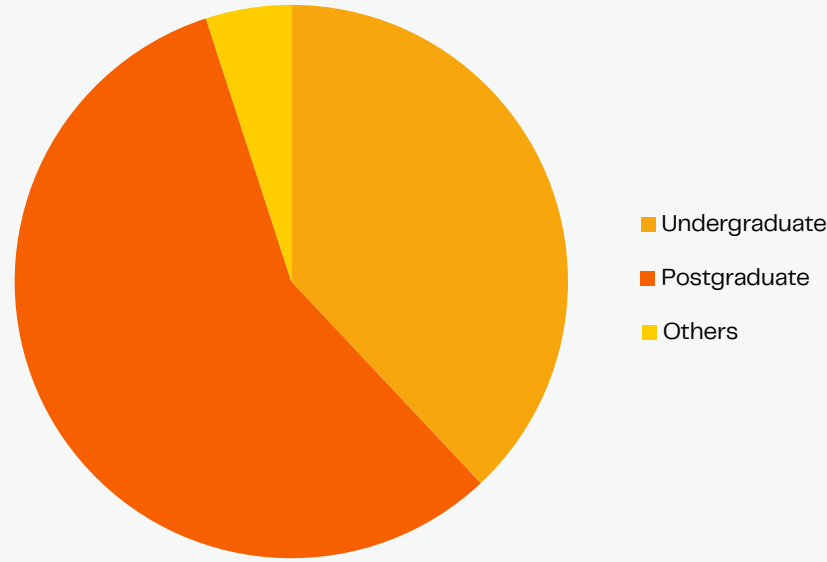
International Student Survey respondent demographics

Subject preference



Source: QS International Student Survey

Study level



Source: QS International Student Survey

QS, your higher education partner

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Provide sector-leading analytics and insights to enable global benchmarking and performance improvement

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

Map in-demand skills needs to teaching, research, and employability for future workforce readiness

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