



Student Mobility and Motivation:

Canada

Inbound student
perceptions

Powered by the QS International Student
Survey and Global Student Flows

2026

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Foreword



Ben Webb
Executive Director, Americas
QS Quacquarelli Symonds

For many students, Canada continues to represent an attractive combination of academic quality, career opportunity and quality of life. At the same time, recent policy changes have reshaped the country's recruitment outlook, creating a more complex environment for institutions seeking to attract international talent. Canada is forecast to experience a period of contraction in international student numbers before gradually stabilising later in the decade.

Against this backdrop, understanding student demand has never been more important. Recruitment success will rely not only on where students come from, but also on what they want to study, what drives their destination choices, and how they expect institutions to engage with them throughout their decision-making journey. This report combines insights from the QS International Student Survey and Global Student Flows to

examine these questions from the perspective of prospective international students considering Canada.

Students continue to value the Canada's welcoming environment, high-quality teaching and post-study work opportunities. Yet there are signs that priorities are evolving. Interest in health-related study is growing, affordability is becoming a weaker motivator, social media is playing a larger role in decision-making, and expectations around communication speed are rising rapidly.

Ensuring that institutional positioning, marketing strategies and conversion processes remain aligned with the expectations of today's globally mobile students is now a key differentiator. We hope this report helps inform those conversations and supports evidence-based recruitment planning for the years ahead.



Turn Insights Into Recruitment Results

Find, engage and recruit more of your ideal students

How we can help:

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

1,500+

universities worldwide trust us to grow and diversify their student cohorts

14,000+

compliance checks delivered over the past five years

50,000+

students engaged through QS recruitment events

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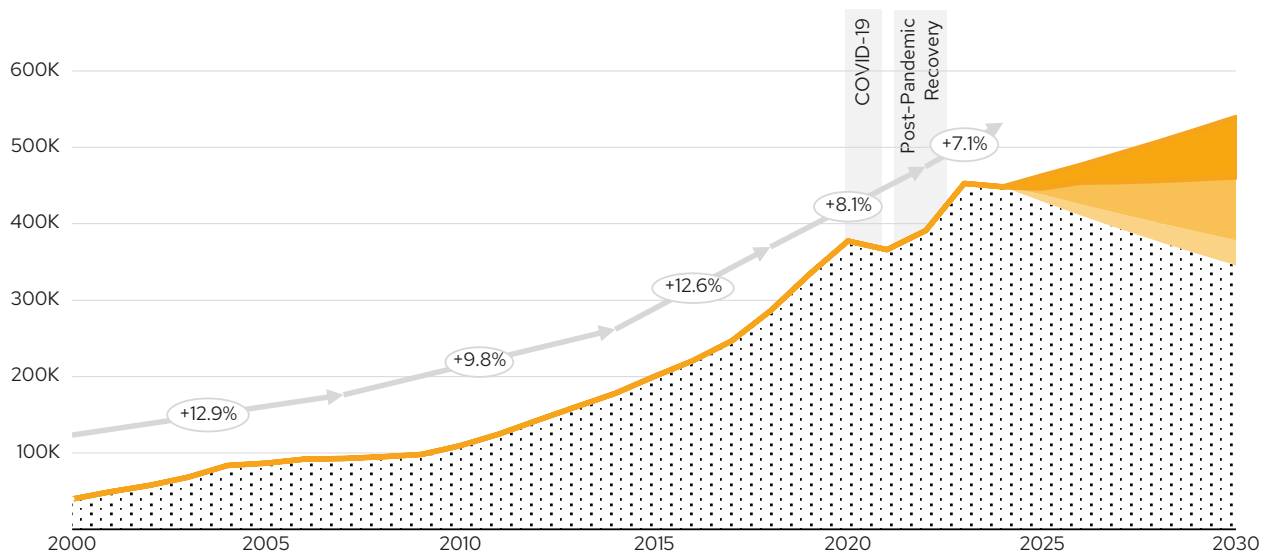


Canada: Market Overview

Inbound Mobility Trends

Overall, we forecast the number of international students in Canada to drop steeply in 2025 and 2026, but recover as we move towards 2030, resulting in an average annual contraction of 1%. This contraction is primarily due to the Canadian government implementing a cap on international students, down to 437,000 in 2025 from over 650,000 in 2023.

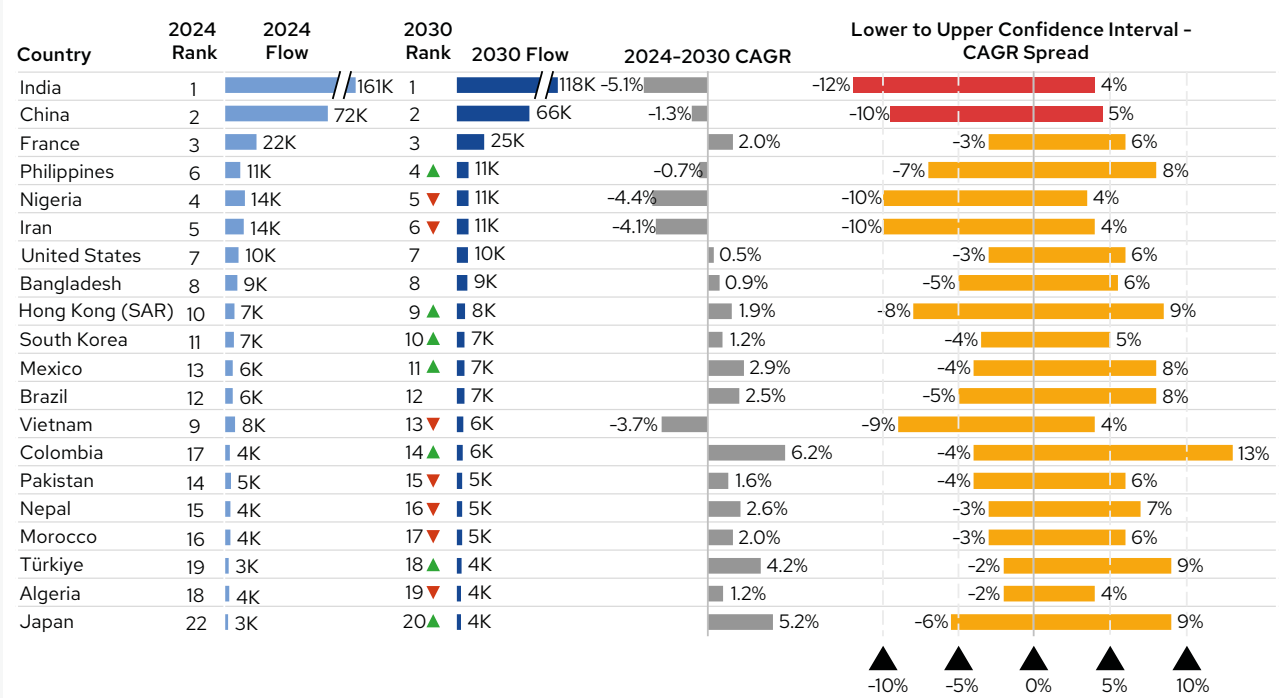
Figure 1. Total International Students Studying in Canada, 2000–2030F



Source: QS Global Student Flows, October 2025

Yet the outlook is not uniformly grim. Our projections suggest the sharpest declines will be concentrated in 2024–2026, followed by a gradual stabilization and mild recovery toward the late 2020s. This turnaround is not driven by optimism, but by structural realities, as the system is not likely to be able to sustain a prolonged contraction of this scale.

Figure 2. Top 20 Source Countries to Canada, 2024–2030F



Source: QS Global Student Flows, October 2025

Read more in Global Student Flows: Canada



Executive Summary

Following years of strong growth, Canada's international enrolments are projected to decline in the short term as the effects of policy intervention work through the system, before gradually recovering towards the end of the decade.

Despite this more challenging recruitment environment, Canada retains a strong international reputation. Alongside a welcoming environment, high-quality teaching and post-study work opportunities remain major factors for students choosing to study in Canada.

Student demand is also shifting at subject level. Business and Management remains the most popular area of study among prospective students considering Canada, but its share of interest has declined. In contrast, health-related disciplines are gaining momentum, with Subjects Allied to Medicine recording the largest increase of any major subject area.

The student decision-making journey is evolving as well. Official university websites and online search remain fundamental sources of information, but social media has become substantially more influential and is now used by over half of prospective students. At the same time, use of rankings and course-finder websites has fallen. Students are increasingly drawing information from a wider mix of channels before making decisions.

Perhaps the most significant operational challenge for institutions lies in student expectations around responsiveness. More than a third of prospective students now expect a personalised enquiry response within 24 hours, while one quarter expect an application outcome within the same timeframe. Expectations for speed have increased across both stages of the recruitment funnel, reinforcing the importance of efficient enquiry handling, transparent admissions processes and timely communication.

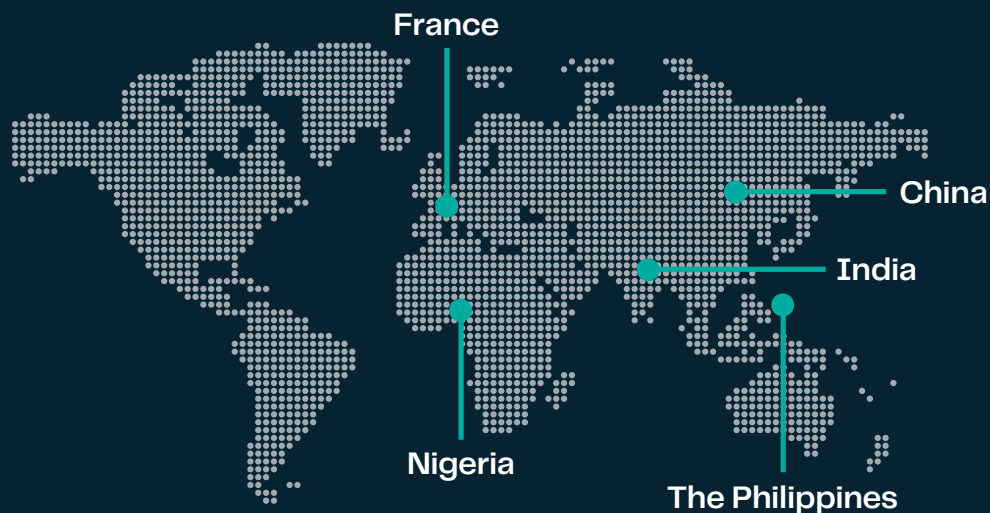
Inbound Trends

What do Canada-bound students
want from institutions?

At a Glance

Where Are Canada-Bound Students Coming From?

Top Markets by 2030



International students projected in Canada by 2030

415,000

What Do They Want to Study?

Top Subjects in 2026

#1

Business & Management

#2 Engineering and Technology

#3 Subjects allied to Medicine

#4 Computing

#5 Medicine & Dentistry

Biggest Changes Since 2022



Subjects Allied to Medicine



Medicine & Dentistry



Business & Management

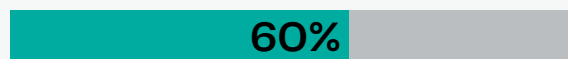


Computing

What Do Students Seeking Study in Canada Want?

Top Decision Drivers in 2026

when choosing a country



Welcoming to international students



Post-study work opportunities



High-quality teaching



Affordable cost of living



Affordable tuition fees

Fastest-Rising Factors Since 2022

▲ Professional networks +4pp

▲ Study visa access +2pp

▲ Already living in Canada +2pp

How Quick Do Students Expect Responses?

19% expect a complete and personal enquiry response within 24 hours

69% expect a complete and personal enquiry response within three days or less

26% expect an application outcome within 24 hours

21% are willing to wait up to one month for an application outcome

Most Influential Information Sources

73% Official university website

61% General online search

51% Social media

44% Institution information sessions / university fairs

30% Course-finder websites

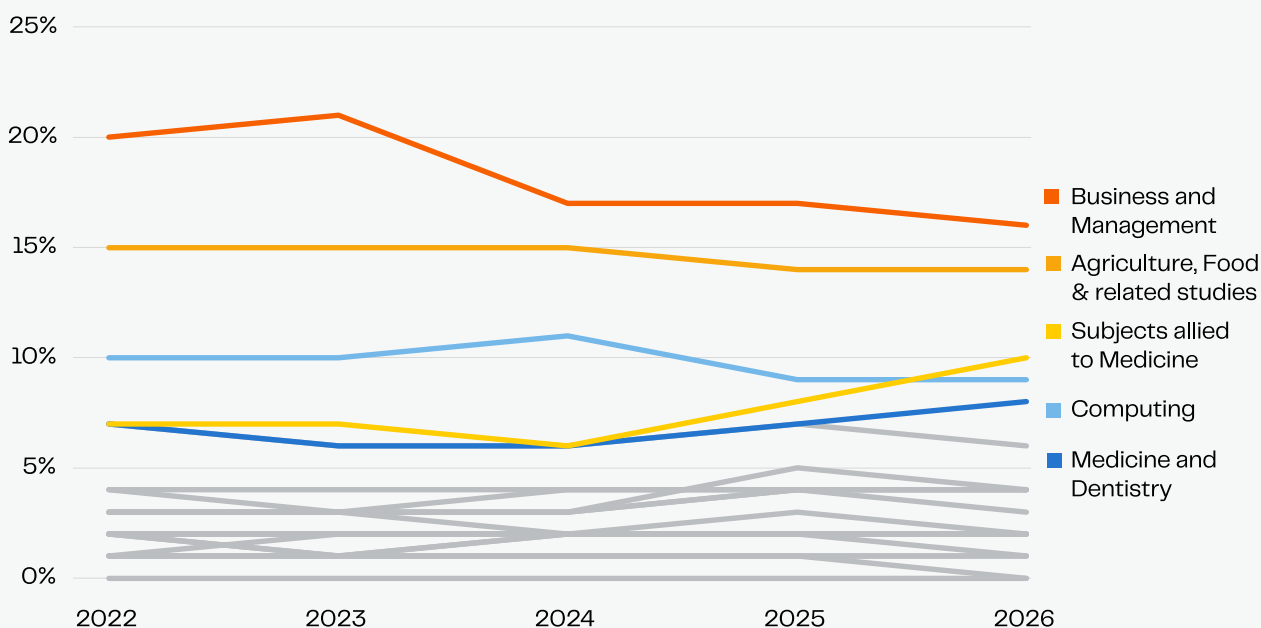
29% Rankings

Subject-level Interest

Business and Management continues to attract the largest share of interest, though its position has softened from 20% in 2022 to 16% in 2026. Engineering and Technology remains the second-largest subject area, holding relatively steady at 14% in 2026, only one percentage point below its 2022–2024 level. Computing, another core recruitment subject area, has also eased slightly, falling from 11% in 2024 to 9% in both 2025 and 2026.

The clearest growth story is in health-related study. Subjects allied to Medicine has risen from 7% in 2022 and 2023 to 10% in 2026. Medicine and Dentistry has also increased, from 7% in 2022 to 8% in 2026.

Figure 3. Canada Inbound Mobility: What Do Canada-bound Students Want To Study



Source: QS International Student Survey

Most smaller subject areas remain highly stable, with little movement across the five-year period. Agriculture, Food and related studies holds at 4%, Architecture, Building and Planning at 2%, Communications and Media at 2%, Creative Arts and Design at 2%, and Physical Sciences at 2%.

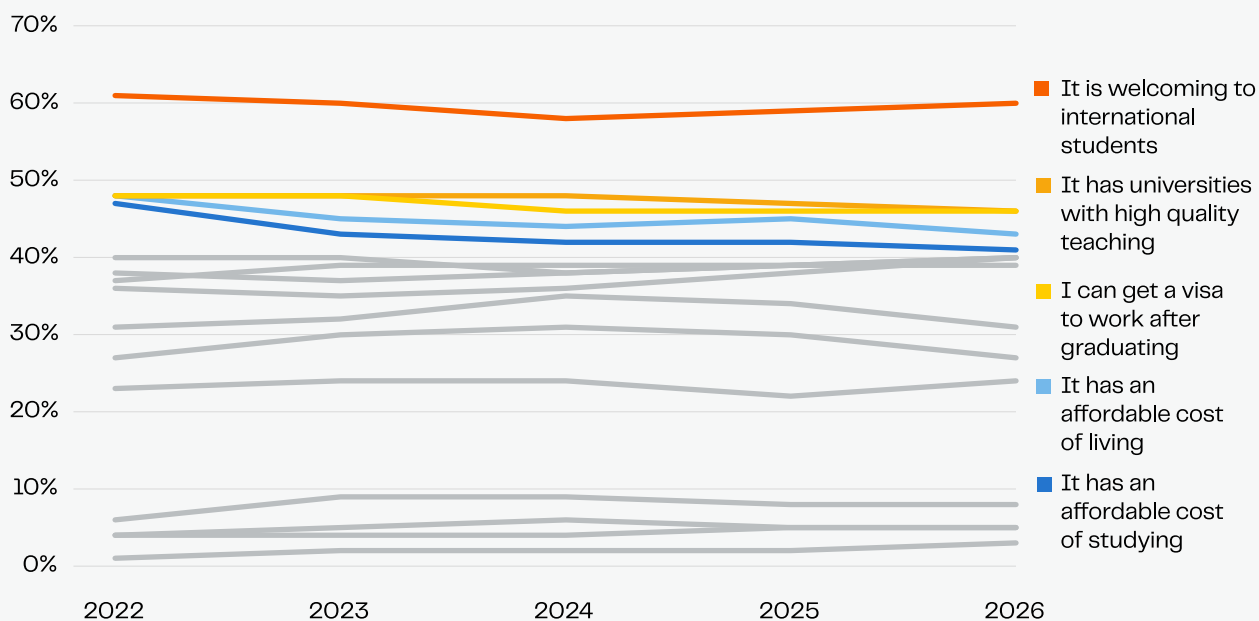
Key Questions for Institutions:

- Are current campaigns over-reliant on Business and Management as the primary recruitment story?
- Where can health-related programmes be positioned more clearly around employability and labor-market demand?
- How can you protect interest in Computing and Engineering while responding to signs that these fields may be losing share?
- Which smaller but stable subject areas offer opportunities for targeted, lower-volume recruitment rather than broad-based awareness campaigns?



Factors That Drive Students to Canada

Figure 4. Canada Inbound Mobility: Important Factors When Choosing a Country

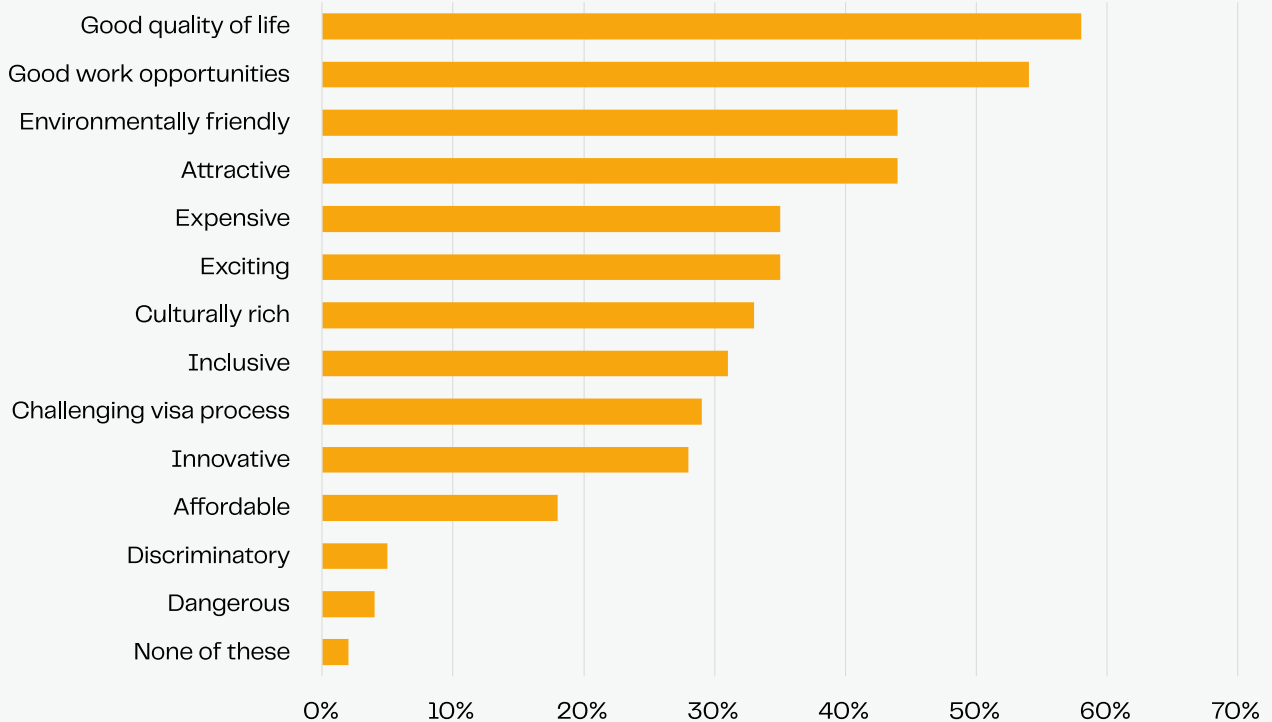


Source: QS International Student Survey

For students looking to study in Canada, a welcoming destination is by far the most important factor (Figure 4). Fortunately, Canada is strongly associated with a good quality of life, and work opportunities, and rarely seen as discriminatory or dangerous

(Figure 5). There are interesting movements around value and access – affordability has weakened as a motivator, with affordable cost of living falling from 48% to 43%, while affordable cost of studying has declined from 47% to 41%.

Figure 5. Perceptions of Canada by Prospective International Students



Source: QS International Student Survey

The clearest positive shifts are linked to outcomes and networks. The share selecting “it will help me build a network of connections” has increased from 36% to 40%. Graduate employment options have also recovered to 40% after dipping in 2024.

Key Questions for Institutions:

- Can you leverage positive perceptions of Canada in your marketing messages?
- Where can recruitment messaging provide clearer confidence around study visas, post-study work routes and the practical steps involved in choosing Canada?
- How can Canada’s reputation for good work opportunities be connected more directly to employability, graduate outcomes and the networks students can build?

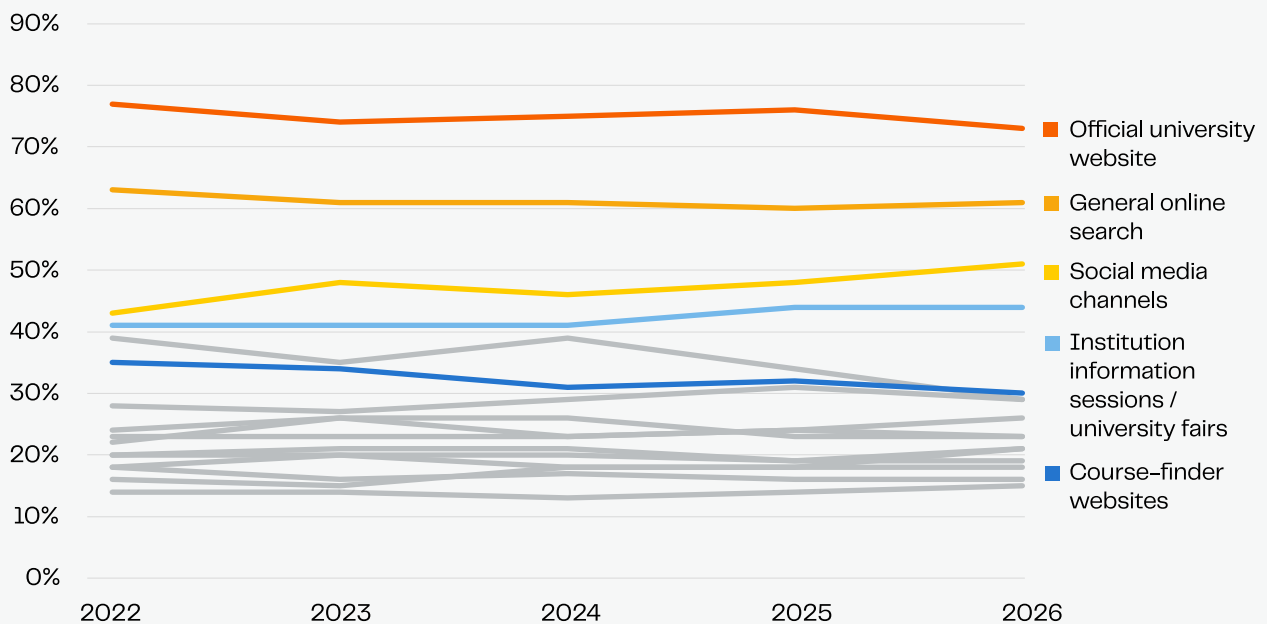
The Information Sources Students Use To Make Decisions

Students considering Canada are still most likely to use institution-owned and search-led channels, but the trend data shows a clear shift in how they gather information. Official university websites remain the top source, used by 73% in 2026, though this has fallen from 77% in 2022. General online search remains second at 61%, broadly unchanged from 2023. Together, these channels remain central to decision-making, but the small decline in university website use suggests institutions may need to work harder to make their owned content easier to find, especially via AI search.

The biggest growth story is social media, which has risen from 43% in 2022 to 51% in 2026. The gap between social media and other sources – such as rankings, course-finder websites, advertisements or discussions with admissions staff – has increased since 2022. Institution information sessions and university fairs have also grown, reaching 44% in 2025 and 2026, while education agents have increased to 21%.

By contrast, rankings – though still used by nearly a third – have dropped in usage since 2022, and course-finder websites have declined from 35% to 30%. Students are combining owned channels with social proof, live interaction and intermediary support, so messaging needs to be consistent across university websites, social platforms, events, agents and admissions teams.

Figure 6. Canada Inbound Mobility: Information Sources



Source: QS International Student Survey

Key Questions for Institutions:

- How visible and persuasive is your institution across the social media channels students now rely on most heavily? Is your channel mix focused on the social media used in Canada's top source markets?
- Are official university websites and search content structured clearly enough to support students who are comparing options quickly, including through AI search?
- How consistent is your core message across websites, social platforms, events, agents and admissions teams?

Student Conversion and Communication

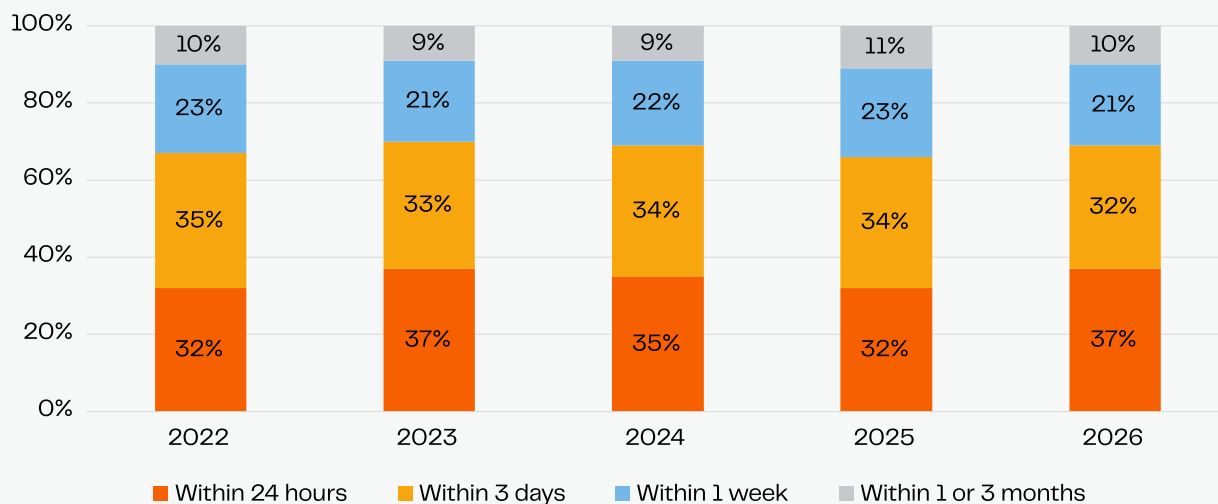
For students seeking study in Canada, student expectations around speed of response are high, particularly at the enquiry stage. In 2026, 37% of prospective students expect a complete and personal response to their enquiry within 24 hours, up from 32% in 2022 and matching the previous high seen in 2023. A further 32% expect a response within three days, meaning nearly seven in ten students expect institutions to respond personally within 72 hours. This makes fast, tailored enquiry handling a core part of the conversion experience, not simply an operational benchmark.

The shift is even more striking when seeking an application outcome. The share expecting notification within 24 hours has risen from 19% in 2022 to 26% in 2026. At the same time, tolerance for longer timelines is narrowing, with those happy to wait up to one month has fallen from 27% to 21%. While application decisions often require more complex processing than enquiries, the data suggests students increasingly expect near-immediacy, clarity and responsiveness throughout the funnel. With the Canadian student recruitment market set to contract through to 2030, rapid communication is especially important, with delays potentially weakening confidence or push students towards destinations and institutions that respond sooner.

Key Questions for Institutions:

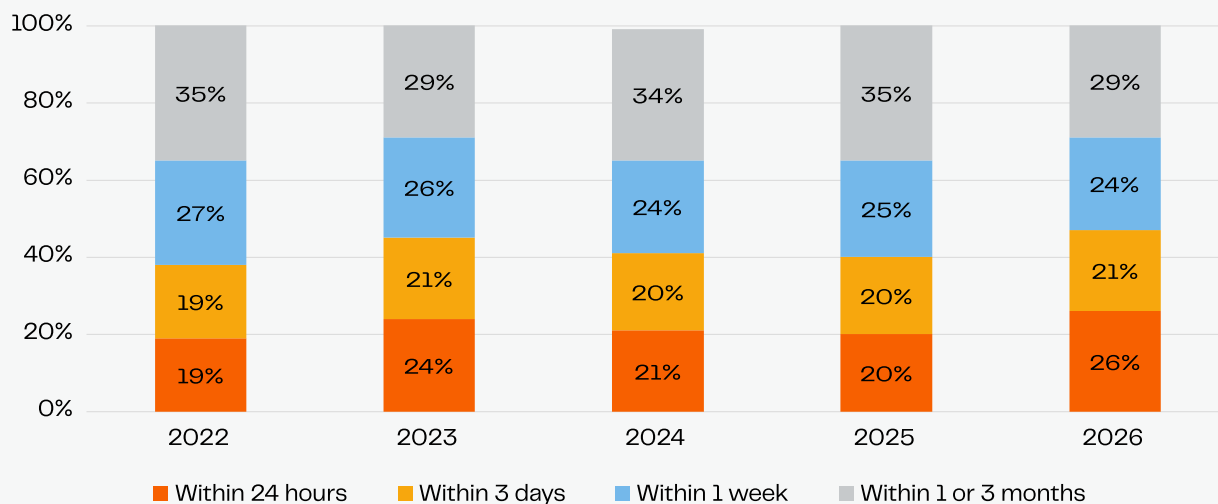
- Can enquiry response processes consistently deliver a complete, personal reply within 24 hours, especially during peak recruitment periods?
- Where can application-stage communication be made faster or clearer, even when a final decision cannot be issued immediately?
- How are response-time expectations being managed across admissions, recruitment, agents and automated communications so students receive a coherent experience?

Figure 7. Canada Inbound Mobility: Expectation of Time To Receive a Complete and Personal Enquiry Response



Source: QS International Student Survey

Figure 8. Canada Inbound Mobility: Expectation of Time To Receive Their Application Outcome



Source: QS International Student Survey





Methodology

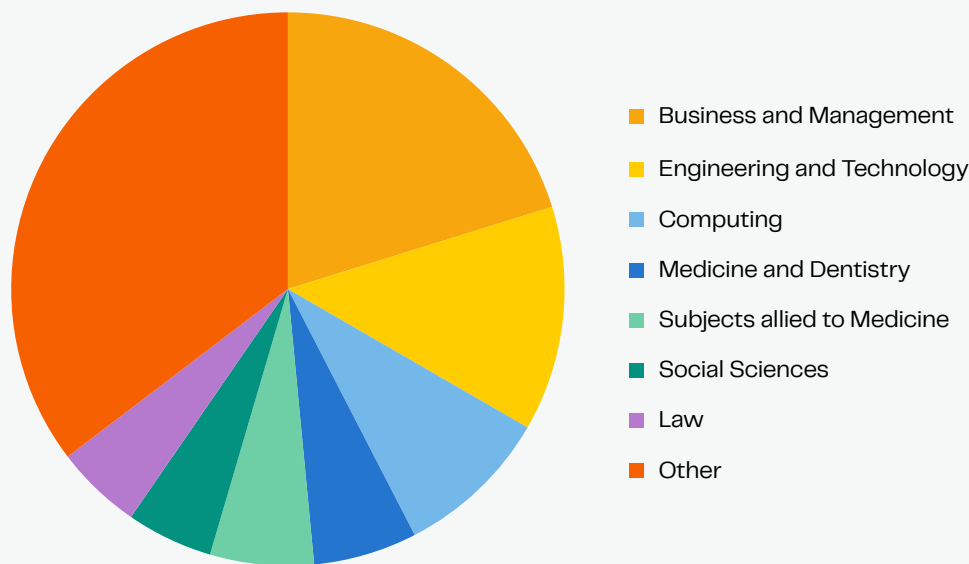
The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2026 iteration draws on responses from over 42,115 students in 191 locations, and this report uses over 500,000 responses from the past five years.

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 are collected 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 5 January and 6 April 2026, via Qualtrics, an online survey management platform. The Survey contains 50 unique questions, covering a range of topics relating to prospective student decision-making, from their study background to their priorities, marketing communication preferences, through to their principal information sources, career aspirations, and post-study plans. The 2026 iteration of the Survey also contains questions on candidate perceptions of different locations as study destinations. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

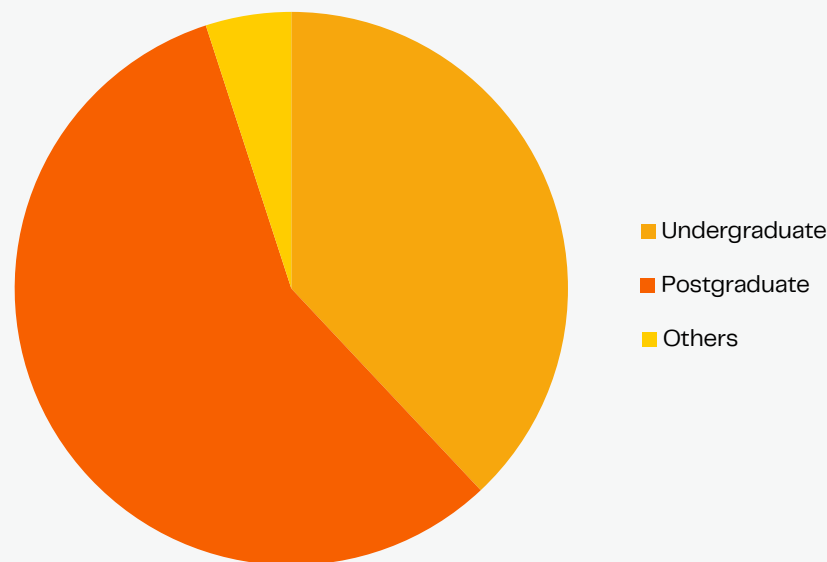
International Student Survey Respondent Demographics

Subject Preference



Source: QS International Student Survey

Study Level



Source: QS International Student Survey

QS, Your Higher Education Partner

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

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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

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