



Canada

**Global Student Flows
October 2025**

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Foreword



Ben Webb
Executive Director
QS Quacquarelli Symonds

I am pleased to present the Global Student Flows: Canada report. For the past eight years, the Global Student Flows Initiative has delivered trusted insights for policymakers, universities, and higher education leaders.

This year, the Initiative has taken a major step forward by combining QS datasets – including the QS International Student Survey and institutional performance data – with student mobility flow analysis. This approach provides a richer, more comprehensive view of Canada’s international education landscape.

Canada has long been one of the world’s most attractive study destinations, recognized for its academic excellence, inclusivity, cultural diversity, and global outlook. But the past few years have seen the landscape change. Universities in traditional ‘sending markets’ are strengthening their own global reputations, and the Canadian government has introduced new measures affecting inbound student flows. Canadian institutions must revise their strategies to manage risk, secure long-term financial sustainability, and explore new pathways for growth.

This report takes a wide-angle view of Canada’s international student mobility. Using an evidence-based framework, we model possible futures for student recruitment through 2030 under three scenarios: Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound. These scenarios provide higher education leaders with the foresight needed to plan strategically for the decade ahead.

We also analyze inbound and outbound mobility patterns for Canada and forecast student numbers through 2030. Combined with fresh insights from the QS International Student Survey, this analysis generates practical recommendations to help Canadian universities refine recruitment, engagement, and retention strategies. At QS, we are steadfastly committed to supporting Canada’s higher education sector as it works through a challenging period.

The insights presented here mark only the beginning of what’s possible in partnership with QS. Our teams deliver advanced analytics for global benchmarking, connect institutions with prospective students, and foster innovation and skills development to support sustainable growth. With deep, data-driven knowledge of higher education worldwide, we can help Canadian universities understand their role in a time of uncertainty – and empower them to succeed.



Your Higher Education Partner

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

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

Why Partner With QS

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

We help to:

Transform complex data into clear, actionable intelligence

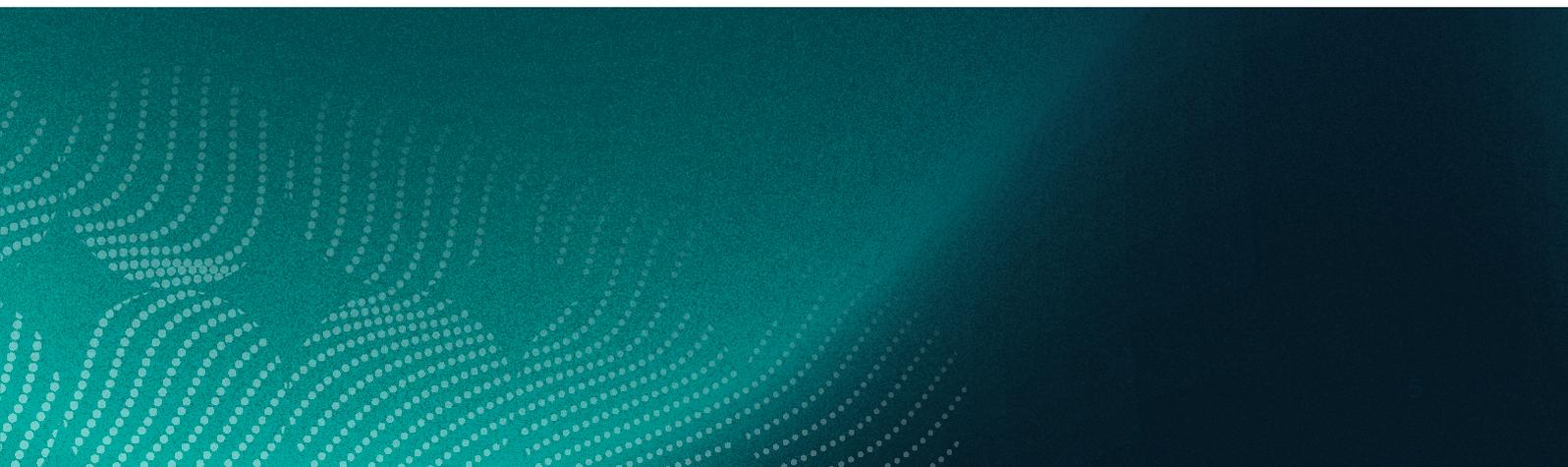
Provide sector-leading analytics and insights to enable global benchmarking and performance improvement

Connect universities with the right students through our platforms, data, and targeted engagement

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

Support innovation, new models, and market expansion for long-term institutional growth

[Get in touch to find out more](#)



Report Findings

Executive Summary

Policy Shifts Are Constricting Capacity and Growth Opportunities

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.

With Limited Student Numbers, Universities Must Increase Market Share

After a growth period post-COVID, Canadian institutions will be forced into a battle for market share. No longer able to rely on rapid expansion, Canadian institutions must differentiate their offering – whether by aligning curricula to employer needs, increasing reputation or offering innovative delivery models, such as world-class online programs.

Understanding your target markets is crucial for institutions looking to increase enrollments in a low-growth environment. QS International Student Survey data shows students consider reputation when making study decisions.

Decreasing Reputation Poses Future Risks

The median Academic and Employer Reputation rank of Canadian institutions has seen a dramatic decline since 2017. At the same time, the importance of reputation to prospective students has increased, and other countries, such as Malaysia, have rapidly improved their reputation performance. At a time of low growth, Canadian institutions need to rebuild their reputation among key stakeholder groups, or students may look to study in other countries that are both closer to home, and lower in cost.

Employability Is a Key Focus for Students

For students looking to study in Canada, post-graduate employment, skills development and return on investment are key priorities. Fortunately, our Employment Outcomes metric shows Canadian institutions are performing well. However, this is not translating into a strong Employer Reputation. Canadian institutions need to ensure that their students are graduating with the skills that employers require by aligning curricula to business needs, bolstering careers services, and embedding experiential, work-based learning across programs.

Scenario Planning Is More Important Than Ever

Amid uncertain policy environments, it's critical that institutions do not commit to a single plan, and instead integrate flexible, scenario-based planning. Our three scenarios, Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound offer three potential futures to help guide leaders' decision-making.

Strategic Challenges

1. Increasing Competition Threatens Institutions' Financial Stability

Following a period of growth, institutions must now adapt to a lower growth environment. What can institutions do to mitigate the impact of decreasing student numbers?

2. Labor Market Alignment

Increasingly, students look for data and information about the return on their investment, and what career they will be able to have because of their degree. How are institutions articulating their employability expertise during the student recruitment process?

3. Emerging International Education Hubs Outside the 'Big Four'

The growing attractiveness of destinations in Asia and the Middle East could present new competition in an already challenging recruitment market. How can Canadian institutions compete against lower-cost alternatives that are rapidly improving their reputation?

2030 Outlook

In Brief

The number of international students enrolling in Canadian institutions will decline by around 10% in 2025 and 2026.

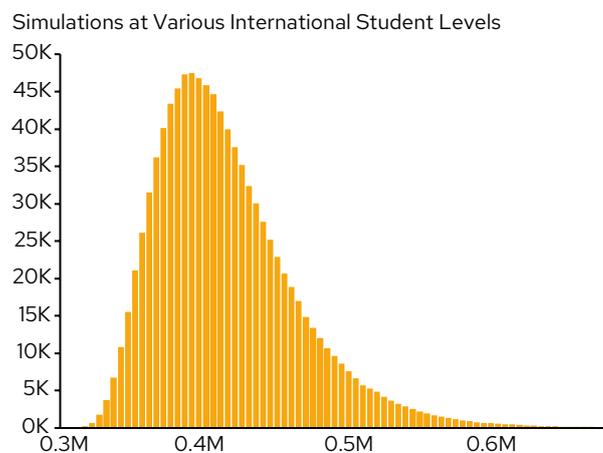
However, we forecast a mild recovery towards the latter part of the decade, resulting in an average annual contraction of 1%. This follows years of double-digit growth.

Canada's international education sector is in the midst of its most significant adjustment in two decades. After years of unrelenting growth, the country's foreign student inflows have entered a sharp correction phase – triggered first by federal policy caps and then compounded by growing perception challenges abroad. Yet while 2024–2026 marks a clear downshift, the story through 2030 may not be one of steady decline. Rather, we predict it could be one of contraction, recalibration, and eventual stabilization toward the end of the decade.

In early 2024, Canada introduced an intake cap aimed at reducing new study permits by roughly 40% – a move designed to cool overheated housing markets and address concerns about the integrity of parts of the international education system. In 2025, the federal government reduced approved study permits by a further 10%. The adjustment had an immediate impact; by 2025, several large universities and colleges were reporting 40–50% declines in new foreign student enrollments compared with the previous year.

Given these developments, we estimate that the stock of international students enrolled in Canadian institutions will decline by around 10% in 2025 and 2026 with an eventual stabilization

Figure 1. Simulation Frequency for Total International Students to Canada in 2030



Source: QS Global Student Flows, October 2025

expected towards the end of the decade. Over the full 2024–2030 period, this translates into an average annual contraction of roughly 1%, following years of double-digit growth. The projected 1% annual decline would reduce international post-secondary enrollments from about 470,000 in 2023 to 415,000 by 2030*.

The adjustment follows an extraordinary decade of expansion. Between 2012 and 2023, Canada's international student population more than tripled, propelled by aggressive recruitment in India, China, and Francophone Africa. Universities, colleges, and private institutions alike grew reliant on foreign enrollments and that dependence has now become a source of vulnerability. With inflows falling, institutions face budget squeezes, deferred projects, and hiring freezes. In a sector where foreign students also cross-subsidize domestic enrollments, this contraction risks cascading effects across teaching quality, research activity, and even local economies reliant on student spending.

*Our base figures differ from the widely cited one million international students as that total includes all study permit holders, not just those enrolled in higher education. Our figures also focus solely on postsecondary enrollments. The distinction matters as the gap between study permit holders and actual enrollments is substantial at the post-secondary level.

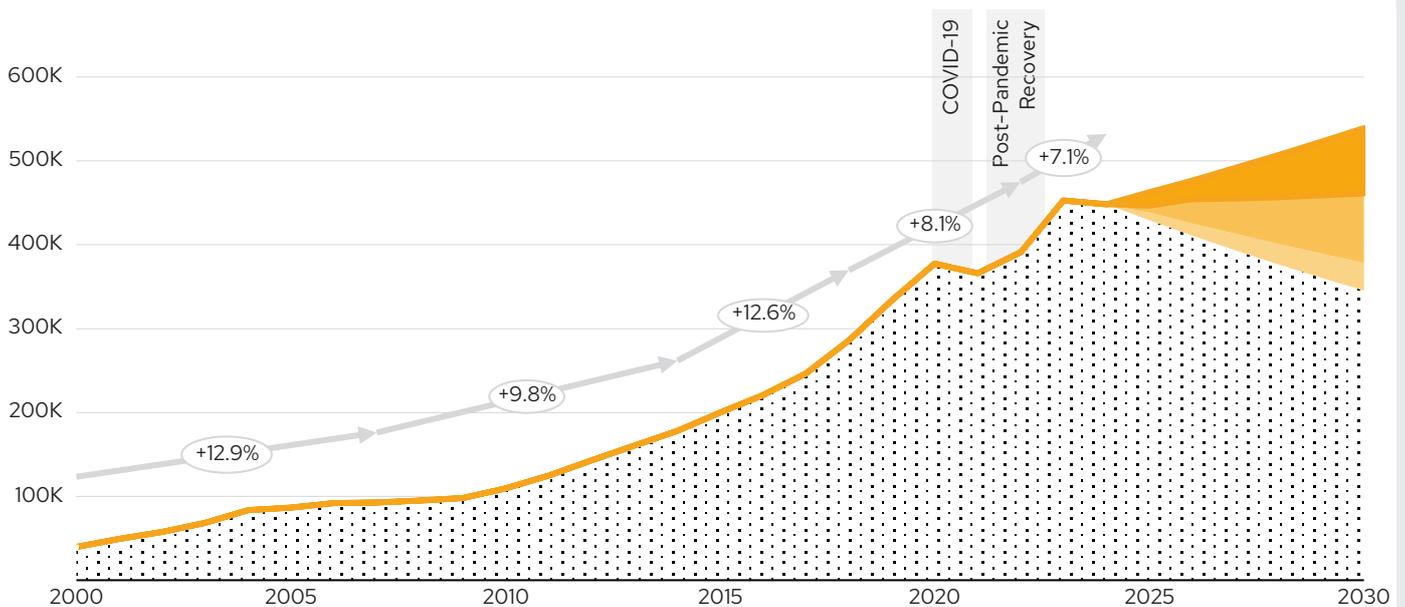
Even before the announcement of the cap, there were early signs of fatigue in key sending markets. Rising costs of living, visa delays, and housing shortages had begun to tarnish Canada’s image as an accessible and student-friendly destination. In India, by far Canada’s largest source market, a perception shift due to uncertainty and a pivot toward alternative destinations such as the UK and Australia is expected to result in a significant drop in student numbers – from 160,000 to 120,000 by 2030. In China, where outbound mobility has only partially recovered after the pandemic, Canada’s recent policy volatility has further cooled demand. Meanwhile, emerging markets in Southeast Asia and Latin America – previously seen as diversification opportunities – are unlikely to compensate for the shortfall in the short term.

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.

A steep, sustained drop in student numbers would create collateral challenges – from shortages in critical skill pipelines (notably in healthcare, technology, and engineering) to the financial strain on public universities that underpin regional economies. Historically, major destination countries that have experienced similar downturns (such as Australia in the early 2010s) have seen a rebound once policy uncertainty eased and recruitment efforts recalibrated.

Our baseline forecast therefore assumes that from 2027 onward, new inflows begin to recover modestly, leading to slow but positive growth in total international enrollments by 2029–2030 – an annual rate of around 5%.

Figure 2. Total International Students Studying in Canada, 2000–2030F

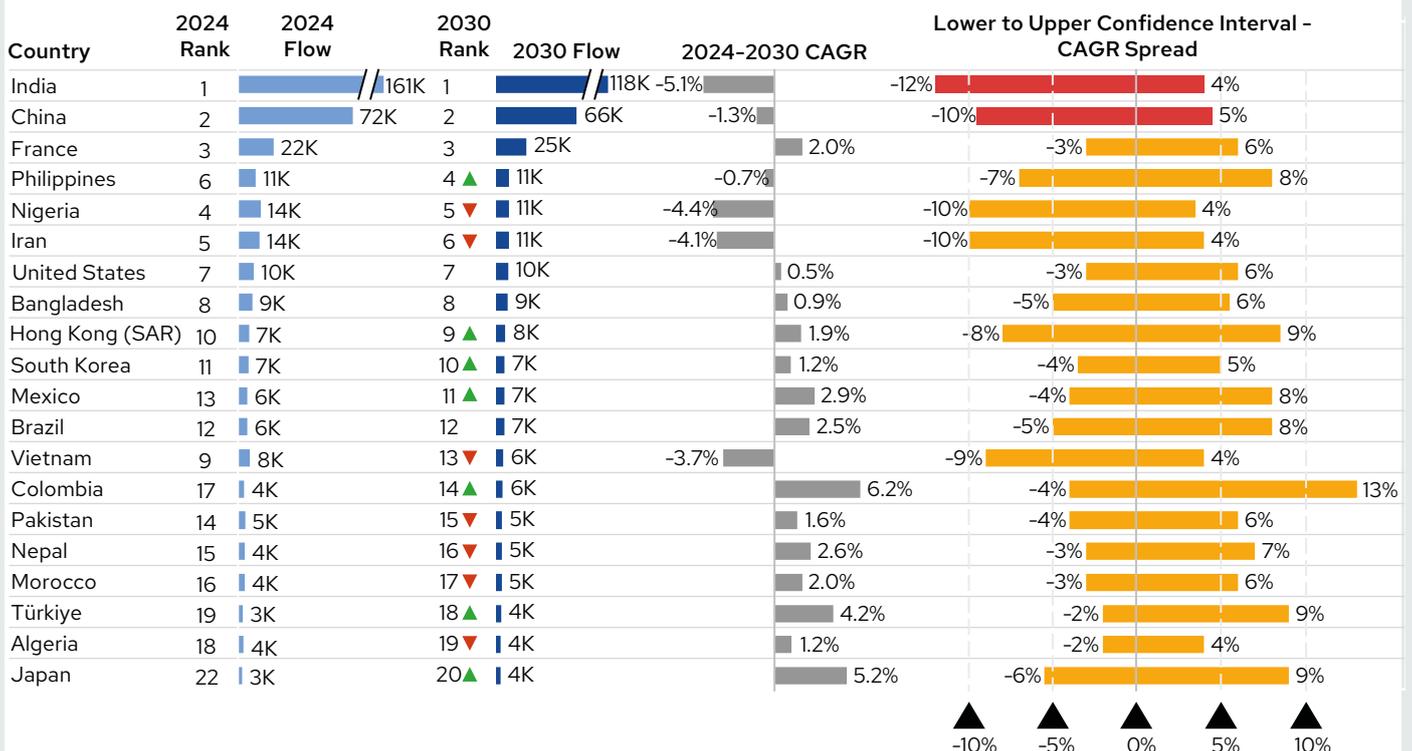


Source: QS Global Student Flows, October 2025

For stakeholders, the key takeaway from this forecast is not just the headline decline but the uncertainty that surrounds it. While current indicators suggest a contraction through 2026, it would be a mistake to plan exclusively for prolonged pessimism. Historically, the international education market has shown remarkable elasticity; sharp declines often give way to rebounds as policy clarity and global demand return. Our inclusion of a late-decade recovery is not a prediction of inevitability, but a recognition of prudent foresight in uncertain times. In highly uncertain environments, institutions are better served by flexible, scenario-based planning rather than committing to a single trajectory that may be distorted by short-term sentiment.

By 2030, Canada’s international education landscape will look different from the pre-2024 era. The period of runaway expansion is over; a more measured, strategically focused phase is emerging. Student numbers may be lower than their 2023 peak, but the sector could emerge leaner, more diversified, and more resilient. In the best-case scenario, Canada will have rebuilt confidence abroad, restored a sustainable inflow of high-quality students, and strengthened its reputation for academic excellence. In the worst-case scenario, policy drift and perception issues could see its global market share erode permanently to competitors. Either way, the next few years will be decisive for universities, policymakers, and investors alike.

Figure 3. Top 20 Source Countries to Canada, 2024–2030F



Source: QS Global Student Flows, October 2025

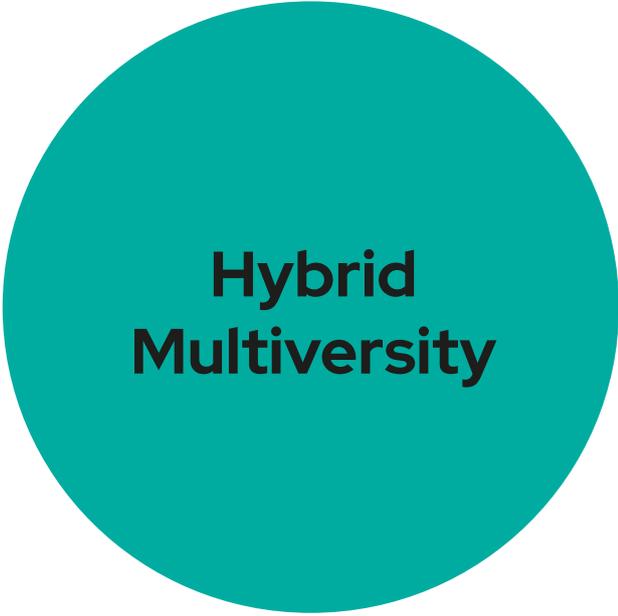
The Three Scenarios for 2030

and How They Impact Canada



Regulated Regionalism

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



Hybrid Multiversity

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

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 scenario in which Canada's international higher education system is reshaped by government-led policies to create a more regionally balanced model aligned with national and local capacities. In this model, following years of rapid growth, the federal government introduces structured controls, most notably the national study permit cap, which allocates limits to provinces and territories based on housing availability, institutional capacity, and labor market priorities.

The National Study Permit Cap, a federally imposed hard ceiling on new international student arrivals, is not applied uniformly but is distributed among the provinces and territories based on population, resulting in significant regional variance. The system explicitly links intake to local capacity, allowing provinces outside major cities to use their allocations to support regional immigration and drive economic growth in less-populated areas.

Canada has also replaced the broad link between study and permanent residency with a selective system focused on retaining high-skilled workers. Access to a post-graduation work permit (PGWP) is now tightly limited: non-degree graduates qualify only in shortage fields such as trades, health, or STEM, and must meet new language requirements. Graduates of public-private partnership colleges have lost PGWP eligibility entirely. In contrast, master's and doctoral graduates receive extended PGWPs, with spousal work rights reserved – shifting immigration benefits toward highly educated, research-focused talent.

These measures, alongside higher financial requirements, make studying in Canada costlier and less accessible, redirecting demand toward regional and domestic alternatives. Students from South Asia, West Asia, and Sub-Saharan Africa are increasingly choosing local or nearby options, as countries like India, the UAE, Malaysia, and Saudi Arabia expand their higher education systems and transnational partnerships.

This emerging, distributed model reduces costs and distances for students while easing housing and service pressures in Canada's major cities. It also channels a smaller, more strategically valuable intake toward regions and programs aligned with labor shortages and immigration goals. Under Regulated Regionalism, Canada would need to focus on quality and capacity over growth.

Hybrid Multiversity

Hybrid Multiversity describes the strategic shift of Canada's international education system, driven by the National Study Permit Cap and high living costs that limit the number of students physically present in Canada. The model allows Canadian institutions to sustain enrollments, quality, and revenue through coordinated, multi-site structures that blend online, regional, and short, high-impact in-country learning.

Many international students complete a substantial portion of their degree online or through regional arrangements, such as Transnational Education (TNE) partnerships or international branch campuses. Their time in Canada is limited to shorter, structured periods that focus on high-value, hands-on experiences that cannot be replicated remotely. These include co-op placements and internships that provide Canadian workplace experience, specialized laboratory and clinical training, fieldwork, and intensive professional networking opportunities. This approach ensures that students gain the practical skills and local exposure necessary for integration into the Canadian labor market while minimizing the constraints of limited campus capacity and high living costs.

Institutions implement shared credit-transfer systems and common quality standards across partnerships to ensure academic quality and mobility. Faculties align curricula and assessments so that degrees partly earned abroad meet Canadian standards. Canadian campuses are repositioned as specialized hubs, emphasizing infrastructure and workplace-integrated learning critical for PGWP eligibility.

Career development is embedded throughout. Micro-credentials earned remotely are integrated into transcripts, giving employers early visibility of student skills. Short-term remote internships lead to mandatory in-Canada placements aligned with regional labor needs. For this model to succeed, Immigration, Refugees and Citizenship Canada (IRCC) must introduce flexible, short-term visa pathways and ensure PGWP rules recognize online and TNE components.

Hybrid Multiversity offers a sustainable, flexible, and distributed approach to international education. It expands Canada's global reach and revenue potential without straining local housing or services, while linking in-country experiences to strategic employment opportunities, affordability, and long-term access to global talent.

Talent Race Rebound

Talent Race Rebound describes a future in which the 'Big Four' reverse the restrictive international education policies of the mid-2020s and position global student recruitment as a central strategy to address workforce shortages and demographic challenges. By 2030, the focus shifts from limiting enrollment to actively expanding intake in high-demand, high-skill sectors such as artificial intelligence, quantum technology, biotech, advanced manufacturing, and healthcare.

The temporary study permit caps and bureaucratic delays of 2024–2025 are replaced by streamlined, student-focused processes that provide certainty and speed for applicants. PGWPs are extended and targeted to priority STEM and health disciplines, and these credentials are explicitly recognized within Express Entry and Provincial Nominee Programs, creating a clear pathway to permanent residency.

Universities and colleges operate in close coordination with federal and provincial governments, as well as industry partners, to align curricula and internships with labor market needs. National scholarship programs are significantly expanded to attract students in priority fields, while private-sector co-investment supports graduate internships and guarantees employment outcomes for high-performing international graduates. Multi-year public research grants and major infrastructure investments, including dedicated AI and biotech centers, strengthen Canada's ability to compete globally for top faculty and students.

Infrastructure constraints, particularly housing shortages that previously limited student intake, are addressed through national and provincial investment strategies, including large-scale public-private partnerships focused on student housing and mixed-use developments in regional cities and smaller urban centers. This approach allows for greater enrollment while distributing international talent more evenly across the country, easing pressure on major metropolitan areas such as Toronto and Vancouver.

For students from emerging markets like India, Nigeria, and Brazil, Canada becomes highly attractive. The country offers a full on-campus experience, access to world-class academic and research environments, integrated professional networks, and a clear, fast-tracked pathway to employment and permanent residency. International education is no longer primarily a source of operational revenue but a strategic tool in Canada's national competition for the skilled talent necessary to sustain economic growth and address demographic challenges.

This scenario represents a decisive pivot from restriction to opportunity, demonstrating how targeted policy, investment, and institutional coordination can transform international education into a core lever for national development.

Outbound Trends

Study Abroad

Canada's outbound student mobility has experienced a complex trajectory, characterized by both gradual progress and notable fluctuations. Prior to the COVID-19 pandemic, approximately 11% of Canadian undergraduate students participated in study abroad programs during the course of their degree, with the majority viewing the US, UK, Australia, and Western Europe as attractive destinations. While efforts to increase international study opportunities have been ongoing, several factors have influenced the pace and direction of this growth.

The Global Skills Opportunity (GSO), launched in 2021, operated as an integral component of the Canadian government's International Education Strategy, aiming to provide financial support to 15,000 Canadian post-secondary students over five years, with a strong emphasis on equity and inclusion. The program prioritized students from underrepresented groups, including indigenous youth, students with disabilities, and those from low-income families, supporting them to gain invaluable study and work abroad experiences through mobility across non-traditional destinations. This initiative reflected a broader shift towards more global diversification in international education engagement.

Canadian academic leaders have called for the government to increase the percentage of Canadian students studying abroad to 25% in the next decade. In terms of destination preferences, while Canadian students traditionally favoured Anglophone countries, with the US emerging as the top host country, recent trends reflect growing interest toward European and Asia Pacific regions such as France, Spain, and Japan. These destinations appeal to students due to factors such as affordability, new academic partnerships, and emerging career opportunities tied to the region's dynamic economic growth.

Canada's outbound mobility is further supported by collaborative bilateral agreements and increased partnerships between local and foreign universities, facilitating opportunities for credit recognition and the introduction of joint programs. These partnerships enable a range of mobility formats for students, including short-term exchanges, internships, and research placements, allowing them to pursue higher education with greater flexibility while reducing financial barriers.

Despite growing awareness of the value of global experiences, many Canadian students still face significant structural and socio-economic barriers that limit their ability to study abroad. Inadequate institutional support, financial constraints, and credit transfer issues further complicate participation. Many Canadian students studying at colleges and smaller universities lack access to international study-related services and advisors to guide them through the process, restricting their ability to gain awareness of available opportunities, complicating the application process, and reducing participation in study abroad programs. According to an evaluation by Employment and Social Development Canada, financial barriers were identified as a primary obstacle, followed by safety concerns and language or cultural barriers to studying in non-traditional destinations, particularly for students from historically marginalized groups.

Looking ahead, Canada's outbound student mobility is expected to grow steadily and diversify over the next few years, driven primarily by strategic government investments and university-led initiatives aimed at enhancing inclusivity and impact. Programs like the Global Skills Opportunity play a critical role in broadening access to international study and work experiences. As the education sector adapts to a post-pandemic global landscape, Canadian institutions are increasingly focused on aligning international experiences with academic relevance, career development, and global engagement.

Transnational Education

With migration policies facing increasing restrictions, transnational education (TNE) has emerged as a strategic channel for Canadian universities to extend their international presence. While global TNE models include branch campuses, articulation and joint degrees, and distance learning, Canada maintains a comparatively restrained footprint in branch campuses. Only around 9% of Canadian universities operate overseas campuses, and just 15% deliver programs offshore via partners. Instead, Canadian universities favor collaborative models, with a striking 81% offering international programs with partner institutions, 63% delivering dual degrees, and 45% participating in joint degree arrangements. This model allows institutions to expand global reach while minimising the financial and operational burdens associated with establishing and maintaining physical branch campuses.

Canada's emphasis on outbound TNE reflects a strategic approach to the global environment. With limited immigration-driven demand, attracting international students to study in Canada alone cannot sustain international growth. Outbound TNE enables universities to reach students worldwide without requiring relocation. TNE fosters global collaboration, integrates international perspectives into programs, and enhances students' skills, contributing to both local and international educational and economic development.

Several Canadian universities have begun to formalize structured TNE strategies. As an example, Toronto Metropolitan University has established three distinct TNE pathways, articulation agreements, joint initiatives, and global program delivery, while Thompson Rivers University maintains an extensive network of partnerships with more than 50 institutions

across 25 countries, including China, Germany, and India. In Alberta, TNE activity is governed by well-defined provincial policies that require institutional responsibility and quality assurance to remain anchored within the home institution, ensuring standards are upheld abroad.

Canada's TNE footprint demonstrates a measured yet steadily expanding approach, with collaborative partnerships serving as the primary mode of delivery rather than direct institutional ownership. By exporting curriculum, credentials, and teaching models through trusted partners, Canadian universities can mitigate risk, draw on local expertise, and expand access while avoiding the substantial costs associated with establishing branch campuses.

Transnational education through branch campuses remains a vital component of international engagement. Globally, the United States leads this model with around 84 branch campuses, while the United Kingdom operates 46 campuses, enrolling approximately 458,000 students across multiple regions, particularly in Asia and the Middle East. Australia, although active, remains behind the UK in scale.

Canadian universities are beginning to explore selective partnerships in key markets such as the Middle East, India, and China, where demand for international qualifications remains strong. Looking ahead, Canada's success in TNE will likely depend on enhancing its flexible partnership-driven model, embedding robust quality assurance, and aligning program offerings with employability outcomes to strengthen its competitiveness in an increasingly crowded global field.

Online and Hybrid Programs

Canada's engagement with online and hybrid transnational education (TNE) is evolving steadily, building on a strong domestic digital learning foundation and reshaped by policy shifts during and after the pandemic. While the country has long been a major study abroad destination, online and hybrid provision is emerging as a complementary pathway that expands access while responding to constraints in immigration policy, housing, and institutional capacity.

Before the pandemic, online education was already embedded across Canadian higher education. A national survey in 2017–18 found that 85% of universities and colleges offered credit-bearing online courses, with fully online enrollments accounting for about 1.36 million registrations annually, or roughly 8% of all post-secondary teaching. This established infrastructure positioned Canadian institutions to pivot quickly during COVID-19, when federal policy allowed international students to complete up to 100% of their studies online from abroad without losing eligibility for post-graduation work permits (PGWPs). The measure, extended through August 2023, signalled a short-term embrace of fully online transnational access.

Since September 2023, however, restrictions have tightened. No more than 50% of a program's credits may be completed online outside Canada for PGWP eligibility, reflecting a policy correction that seeks to balance flexibility with the country's longstanding emphasis on

in-person study. At the same time, Canadian universities continue to expand their hybrid offerings. A 2024 pan-Canadian survey showed that 74% of faculty had taught online in the past year, while 90% of institutions employed learning management systems and nearly four-fifths integrated digital polling and assessment tools. Hybrid programs are becoming the norm, mixing online coursework with short in-person sessions or practical components.

Canada's approach to TNE is shaped just as much by immigration policy as by teaching. In 2024, the Government put a 35% cap on new international student permits, bringing approvals down to about 364,000 as a way to ease housing and cost-of-living pressures. This was followed by a further reduction in 2025, with permits capped at 437,000, down sharply from over 650,000 in 2023. These restrictions highlight both the dependence of Canadian institutions on international enrollments and the challenges in scaling TNE globally at a time of domestic political and economic pressure.

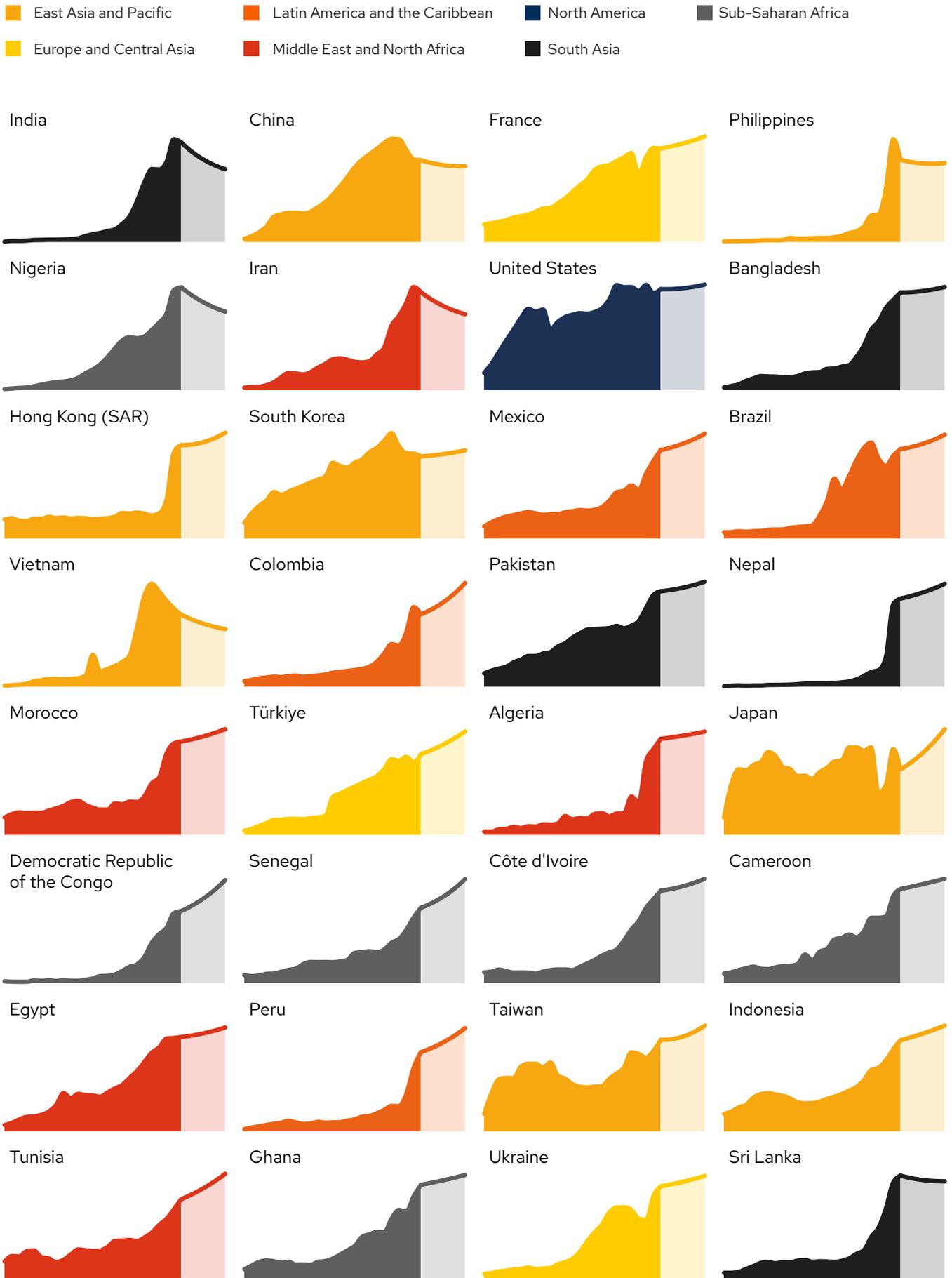
Economically, the stakes are high. In 2022, international students contributed \$37.3 billion to Canada's economy, representing 21.6% of service export revenues, a figure larger than exports of wood products or electronics. While much of this is tied to physical mobility, online and hybrid learning increasingly form part of Canada's international education offer, marketed through official channels such as EduCanada, which promotes "remote access to world-class Canadian universities" for learners abroad.

Unlike the UK or Australia, Canada doesn't have a single global brand for online TNE. Instead, it's driven by individual institutions, schools like Athabasca, Royal Roads, and Thompson Rivers that offer fully online or hybrid programs, alongside universities that weave digital delivery into their regular courses. Provincial networks such as BC Campus and OntarioLearn also help widen access by sharing resources and supporting open education.

These developments suggest that Canada's online and hybrid TNE is entering a critical phase. A strong digital foundation and growing institutional innovation give the country the tools to expand its international reach. At the same time, visa caps, housing pressures, and restrictions on fully online PGWP-eligible study continue to limit growth. The key challenge ahead will be to translate Canada's digital capacity into a coherent global strategy, one that balances quality, accessibility, and immigration policy to strengthen its position in the global TNE landscape.

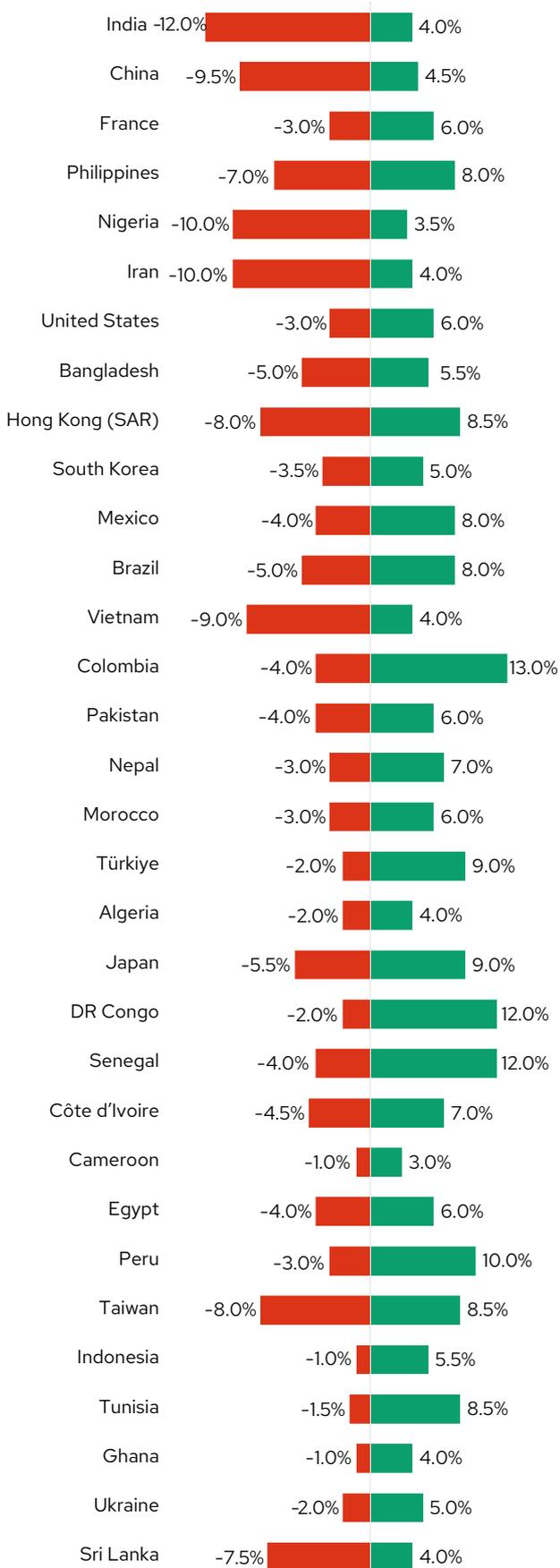
Student Origins

Figure 4. Canada Major Student Origin Growth, 2000–2030F
Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

Figure 5. Canadian Student Origin Growth Outlook. Lower and Upper 95% Confidence Intervals 2024-2030F



Source: QS Global Student Flows, October 2025

South Asia

Student flows from South Asia to Canada are projected to decline by an average of 4.3% over the next five years, following a period of strong growth. South Asia remains the largest source region for Canada’s international students, making up nearly 40% of total enrollments. India dominates this share, contributing about 35% on its own, while Bangladesh, Pakistan, and Nepal also rank among the top 10 source countries.

The national study permit cap has reset growth expectations and sharply reduced approvals for South Asian applicants. The closure of the Student Direct Stream (SDS) in late 2024 has further slowed application processing across all countries, adding to the pressure.

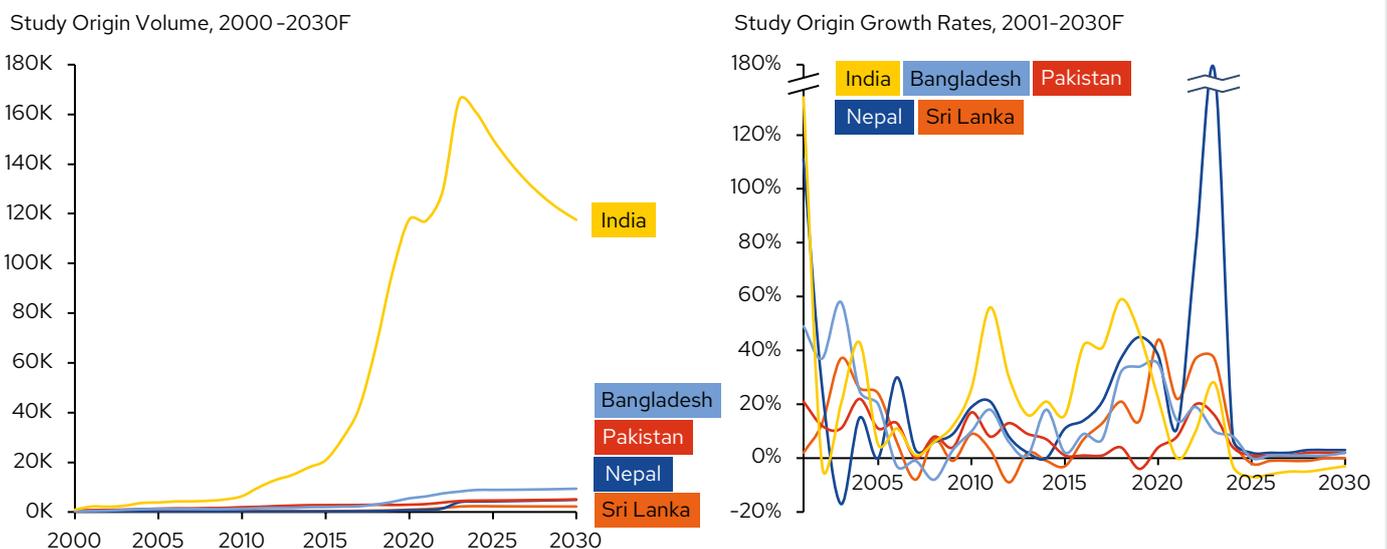
Policy changes around affordability and eligibility are reshaping student flows. Since January 2024, the financial proof requirement has doubled, creating a steep hurdle for many in South Asia. India, the region’s anchor market, has felt the strongest impact, reflected by an 8% drop in enrollments between 2023 and 2024, while permit approval rates have dropped sharply compared to just a few years ago.

Increasingly, international study is seen as part of a broader migration pathway for South Asian students. This makes the PGWP and access to permanent residency (PR) central to their decisions. Recent PGWP eligibility changes have further reduced Canada’s appeal among Indian students, and are expected to slow inflows from this market.

Nepal and Pakistan are expected to continue growing, but at a slower pace. Their growth is supported by strong agent networks and family sponsorships, even though they face many of the same challenges as India. Bangladesh, which had contracted under higher costs and stricter approval barriers, is projected to see a modest rebound. In contrast, India faces the steepest adjustment, with enrollments already falling and expected to decline further as tighter policies and limits on PGWP reduce demand.

Despite the downturn, underlying demand from South Asia will remain strong due to its vast youth population, constrained domestic higher education capacity, and the continued appeal of Canada’s PGWP and permanent residency pathways in certain fields.

Figure 6. Canada Student Origin Growth, 2000–2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

East Asia

East Asian students have traditionally been central to Canada’s international education sector, making up more than a quarter of all international enrollments. That balance is now shifting, with inbound mobility from East Asia to Canada projected to decline by an average of 0.5% over the next five years, reflecting new policy caps on study permits, rising financial requirements, and broader geopolitical tensions.

The impact of these pressures became clear in 2024, after the caps on student permits. The number of students from China fell by 2%, while Japan experienced a sharper decline of nearly 15%. Taiwan and Mongolia were the exceptions, with enrollments growing by 10% and 5%. Initiatives such as the Taiwan-University of Toronto Scholarship have helped sustain this growth.

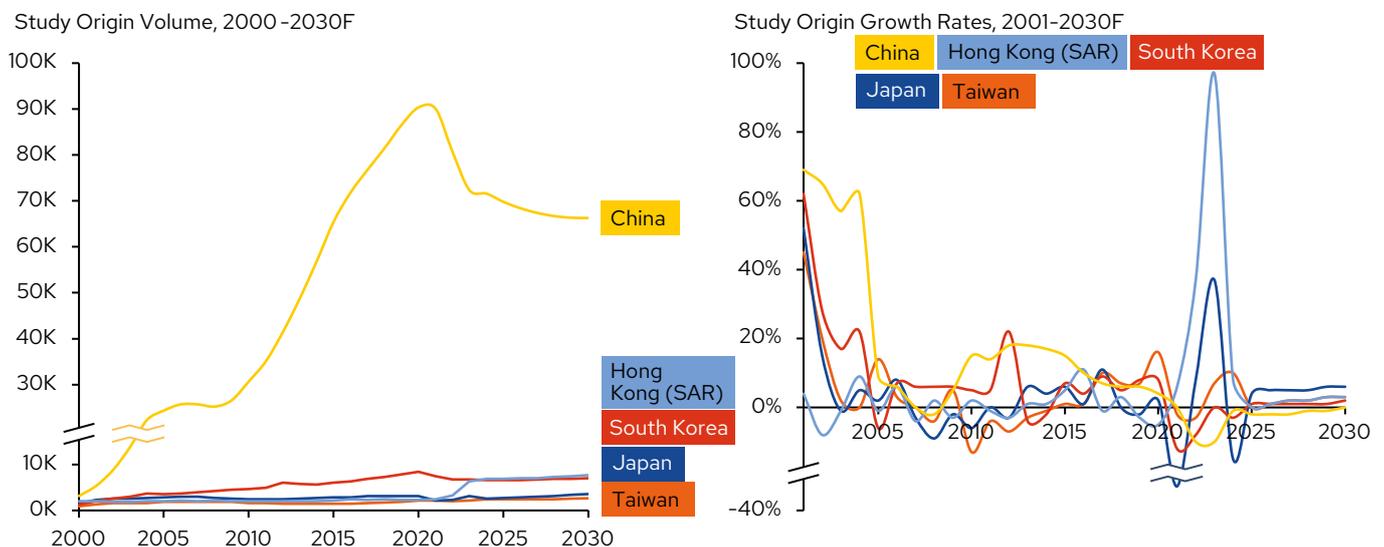
Despite the downturn, China remains Canada’s second-largest source of international students. Canadian universities continue to draw Chinese applicants because of their strong global reputation and relatively simple visa process compared to the United States. Still, the effects of recent reforms are visible where study permit

approvals have dropped steeply, and overall interest in Canada as a destination fell by 35% in the past year. Families, especially in China, have grown more cautious amid debates over immigration, foreign interference, and limits on international enrollments.

Students from South Korea, Japan, and Hong Kong (SAR) have historically been attracted to Canadian universities in British Columbia and Ontario, seeking credentials that boost their competitiveness in global job markets. However, declining numbers suggest that many are now opting to remain in the region, choosing institutions in Japan or Singapore, where universities have expanded international programs.

Looking ahead, East Asian enrollments in Canada are likely to contract at a steady pace. The government’s caps are accelerating a shift toward alternatives in East and Southeast Asia, particularly as many students from this region prefer to return home after their studies. For Canada, this signals a gradual but notable change in one of its most important international student pipelines.

Figure 7. Canada Student Origin Growth, 2000–2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

Africa

Canada remains a significant destination for African students, but growth is moderating. Nigeria remains by far the largest African source country, representing over 4% of all Canadian study permit applications. Nigerian enrollments nearly doubled between 2019 and 2023, growing at an average of 14% per year, driven by the region's youth demographic growth, yet 2024 saw a slight decline of -1.4%. Looking ahead, growth is expected to flatten, with projections indicating a modest 0.7% annual increase through 2030. The slowdown is linked to stricter Canadian visa policies. Nigeria has the lowest approval rate among Canada's top ten source countries, alongside currency volatility that is making international education increasingly unaffordable for many families.

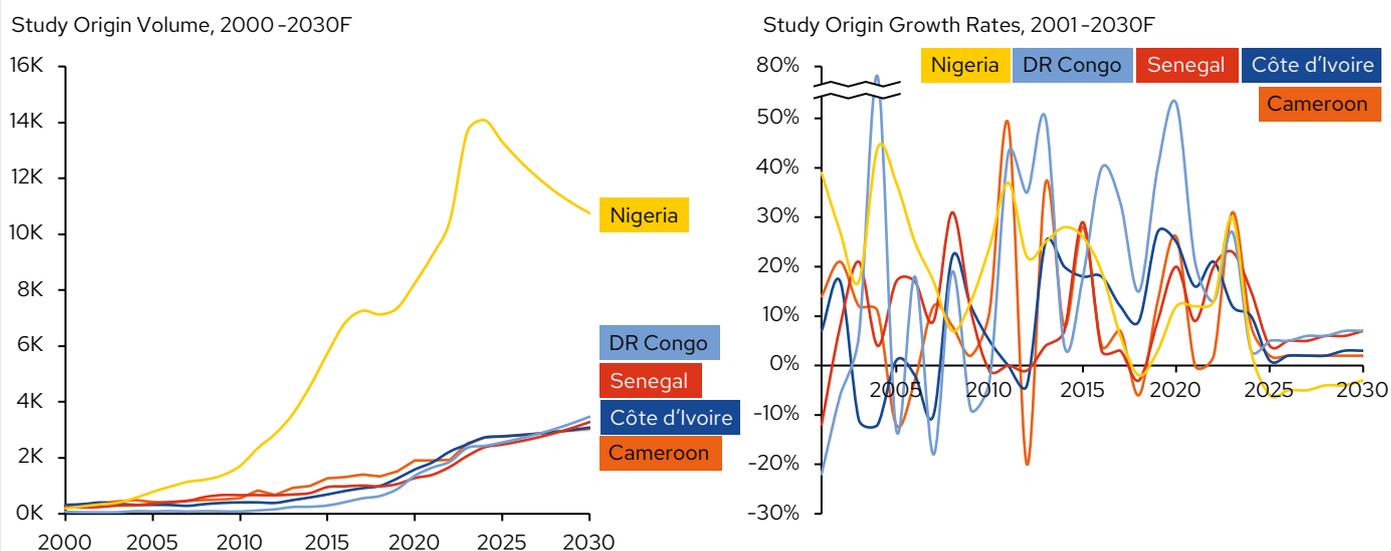
Ghana, by contrast, has been Canada's breakout success. Student numbers grew by 15% annually between 2019 and 2023. However, this spike is unlikely to be sustained, with forecasts suggesting a steadier 1.7% annual growth to 2030. Even so, Ghana will remain a reliable source market, supported by Canada's strong post-study work pathways and demand for

English-speaking graduates in STEM and healthcare.

Francophone Africa is also becoming central to Canada's student mobility strategy, in line with Ottawa's push to boost Francophone immigration outside Quebec. Senegal doubled its student outflow to Canada between 2019 and 2023 and then jumped nearly 15% in 2024, one of the fastest growth rates in the region. Côte d'Ivoire shows a similar trajectory, growing nearly 17% between 2019 and 2023 and another 10% in 2024. Both countries are projected to continue expanding strongly at around 6% and 2% respectively, by 2030. Cameroon has experienced steady growth of 13% over the past five years, although this is projected to slow to 1.7% by 2030.

Overall, while Nigeria and Ghana anchor Anglophone flows, it is Francophone Africa, led by Senegal and Côte d'Ivoire, that is set to drive Canada's next wave of growth. Canada's draw lies in its quality of education, immigration pathways, and targeted recruitment, but visa approval rates, affordability challenges, and the new enrollment cap will impact this trajectory.

Figure 8. Canada Student Origin Growth, 2000–2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

Europe

European student interest in Canada has remained steady; however, recent developments suggest emerging challenges. While Canada continues to be recognized as a safe and stable study destination with globally recognized higher education institutions, European student flows to Canada are expected to grow at a CAGR of 2.2% for the next five years. Students from Europe made up nearly 10% of the total international student body in Canada in 2024, with France leading as the top source country, accounting for approximately half of these numbers.

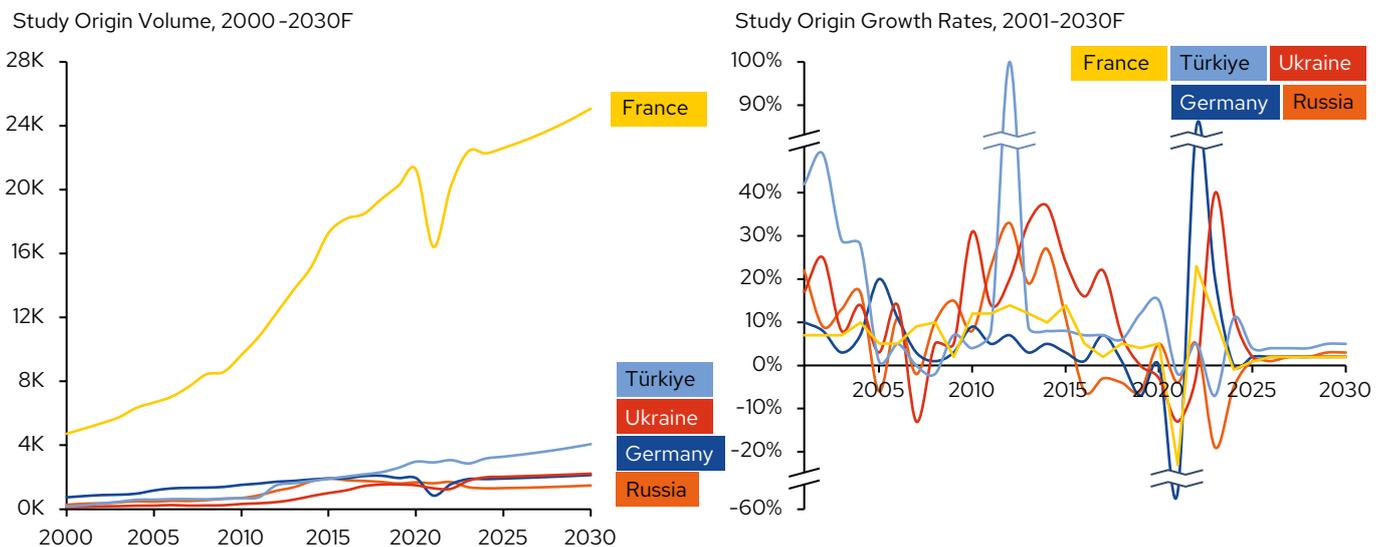
Recent policy changes, particularly the implementation of Canada’s international student enrollment cap in 2024, have contributed to increased uncertainty for prospective applicants. Additionally, rising tuition fees and escalating costs of living have put growing financial pressure on international students coming from the region. French students have been particularly affected, with thousands reportedly denied study permits under the new visa criteria. This decline is reflected in a 0.6% drop in student numbers from France in 2024. In contrast,

Ukraine remains a key source country, with a 12% increase in enrollment numbers as many displaced students continue to seek stable academic opportunities abroad. However, many of them continue to struggle due to high international tuition fees and limited access to financial support.

By 2030, France and Türkiye are projected to grow at average annual rates of 2% and 4.2%, respectively – a slight increase from their previous five-year averages of 1.9% and 4.1%. The launch of Canada’s renewed Francophone Immigration Strategy, aimed at strengthening Francophone minority communities outside Quebec, further supports enrollment from French-speaking European countries by providing a faster route for permanent residence.

While European enrollment in Canada has remained relatively stable, the recent study permit caps and intensified competition from other destinations have prompted students to weigh their options more critically. Nonetheless, Canada remains an attractive destination for many European students.

Figure 9. Canada Student Origin Growth, 2000–2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

Southeast Asia

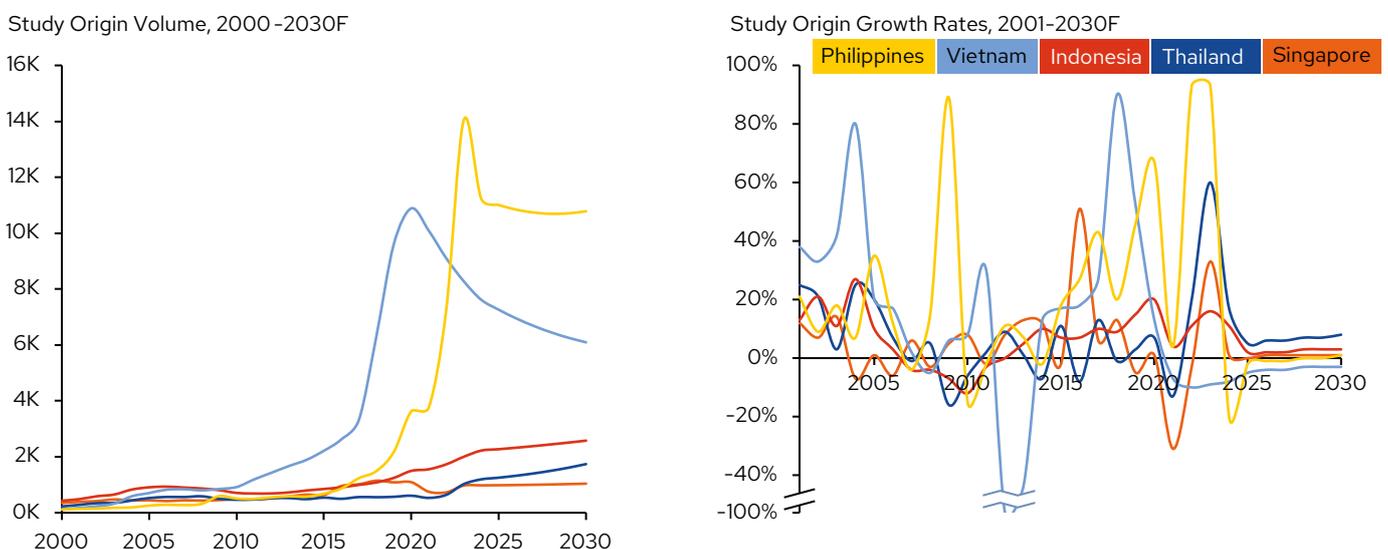
Southeast Asian student inflows to Canada are expected to slightly decline due to recent policy changes affecting international enrollments. Canada continues to attract students from the region with its English-taught undergraduate and graduate programs, along with opportunities for post-graduation work through the PGWP in certain fields. However, tighter immigration and education policies have become the main factor influencing student decisions, while the growing strength of Southeast Asia as an education hub is also encouraging some to stay closer to home.

Canada's recent policy changes have introduced significant barriers for Southeast Asian students. The national cap on study permits, increased financial requirements, and tighter PGWP rules have made it harder for many to pursue education in Canada. These changes have hit Southeast Asian applicants particularly hard, especially with the closure of the SDS in Vietnam, which has led to slower processing times and added uncertainty for potential students.

The regional hub effect amplifies these pressures. Malaysia, Singapore, and Vietnam have expanded higher education capacity and intergovernmental partnerships, offering lower costs and proximity. This has made intra-regional options more attractive, especially for middle-income families who are now less able to meet Canada's tightened affordability thresholds.

At the country level, the impact of Canada's policy shifts becomes clearer. Student numbers from the Philippines fell by around 20% in 2024, with forecasts pointing to much smaller but continued declines as higher financial thresholds and stricter PGWP and PR rules limit applications. Vietnam saw a notable decline of around 8% in 2024, and is projected to experience further reductions in the years ahead under the tightened system. On the other hand, Indonesia saw a robust growth of 11% in 2024, though this growth is expected to settle at a more stable rate of around 2–3% over the next five years, supported by the growing middle class and sustained demand for overseas education.

Figure 10. Canada Student Origin Growth, 2000–2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

Middle East and North Africa

The outlook for Middle East and North Africa (MENA) student flows to Canada is shaped by both Canadian restrictions and the rise of regional alternatives. Canada’s new cap of 437,000 study permits for 2025–26, higher proof-of-funds thresholds, and tighter post-graduation work options add new barriers for MENA students, especially from price-sensitive markets like Egypt, Morocco, and Lebanon. At the same time, Gulf states such as the UAE, Qatar, and Saudi Arabia are consolidating their positions as education hubs, expanding international branch campuses, and offering competitive scholarships. MENA student flows to Canada have flattened, growing at just 0.2% CAGR, as federal policy changes and rising costs weigh on demand. At the same time, lower-cost options in emerging Gulf hubs such as the UAE, Qatar, and Saudi Arabia are drawing students closer to home.

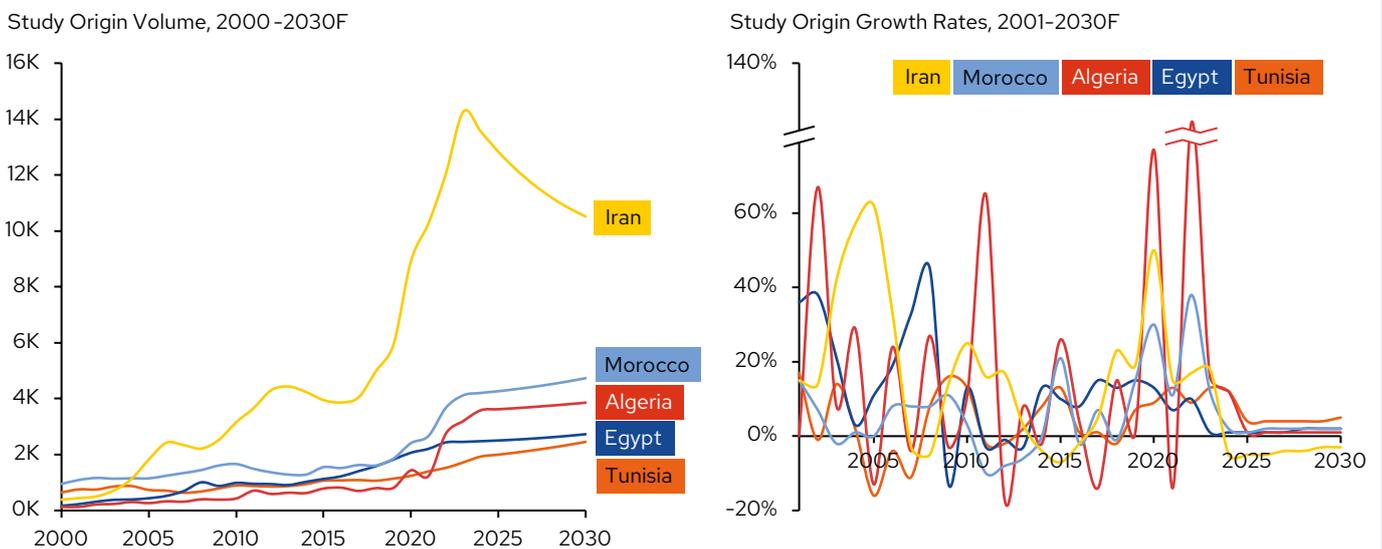
Flows from the Middle East into Canada show signs of contraction. Between 2023 and 2024, Iranian students declined by -6.9% while Turkish students dropped by a sharper -18.8%. These

figures reflect both structural pressures in Canada and the volatility of approval rates, with Iranian permits seeing steep fluctuations in early 2024. More broadly, surveys indicate that the regional interest in studying in Canada has fallen by about 35%.

By contrast, US enrollments from the Middle East have moved in different directions, suggesting that the US is absorbing some redirected demand. Year-on-year growth in 2024 showed gains from Iran (20.3%) and a modest increase from Saudi Arabia (6.8% in visa issuances during the first half of 2025), but contractions from Saudi Arabia overall (-7.3%), Kuwait (-6.0%), and Egypt (-1.9%).

Middle Eastern student flows into Canada are softening under the combined weight of federal caps, higher proof-of-funds requirements, and reduced post-graduation work eligibility. Surveys also indicate that overall interest in studying in Canada from the Middle East has fallen by about 35%, underscoring how policy shifts and affordability pressures are reshaping demand.

Figure 11. Canada Student Origin Growth, 2000–2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

Latin America

Latin American student flows to Canada are moderating, with growth slowing to a CAGR of less than 3%. The outlook is increasingly shaped by affordability challenges, as rising tuition and housing costs make Canada less accessible, while Europe and other destinations offer more affordable alternatives. Visa approval rates for Latin American applicants have also declined, adding to uncertainty for students and institutions. These dynamics highlight a more competitive environment where Canada risks losing ground to closer or more cost-effective options.

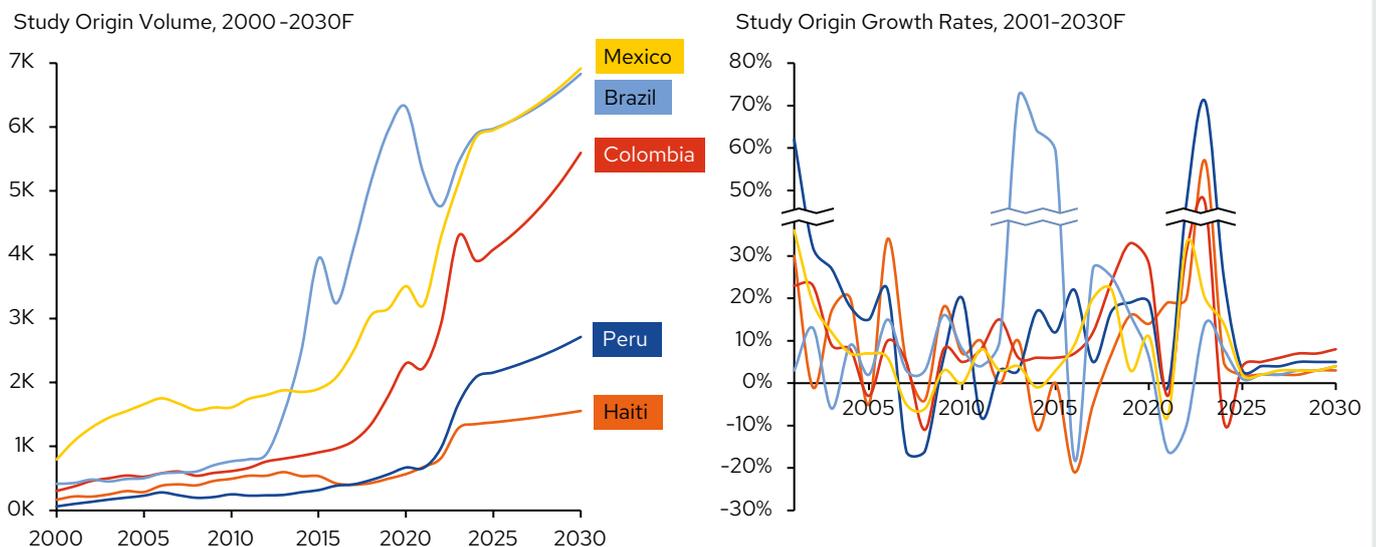
This policy reset coincides with clear declines from Latin America. Between 2023 and 2024, student numbers fell from Mexico (-11.5%), Brazil (-18.0%), and Colombia (-18.6%), reflecting the combined impact of caps, higher costs, and reduced certainty of work opportunities. A University World News survey also noted a 35% decline in Latin American interest in Canada, reinforcing these trends.

Historically, Canada and Latin America have enjoyed deep academic and research

connections. For example, there have been over 5,500 co-authored publications between Canadian and Mexican scholars since 2021. For many Latin American students, Canada has become harder to navigate, with stricter documentation and longer processing times reducing predictability. This is especially challenging for middle-income students, who already face financial risks in studying abroad. By contrast, Spain offers shorter visa windows, recognition of prior qualifications, and linguistic familiarity, lowering both academic and social barriers. These differences are gradually shifting student preference away from Canada.

Looking forward, demand for Canada from Latin American students is likely to remain strong, as many pursue opportunities for permanent residence. However, growth is expected to moderate due to policy changes, including tighter post-graduation work eligibility, study permit caps, and rising costs, which may encourage some students to consider alternative destinations or pathways.

Figure 12. Canada Student Origin Growth, 2000–2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, October 2025

Drivers for Growth

How Universities Can Beat the Forecast

Labor Market Dynamics

In the round, Canada is showing a rapid transition to digitally led industries. Employers will require a more effective development of transferable, digitally led skill sets in graduates entering the workforce. Higher education institutions are at the forefront of this issue, with a vital role to play in the skills development of the future labor force. While Canadian higher education institutions can be considered world leading, they will still require support from a variety of stakeholders to engage the potential of both domestic and international graduate students and to drive the country's long-term economic growth.

The ability to assess where these skills shortages will have the greatest impact is crucial. Data from Statistics Canada highlights that the sectors driving the greatest employment change include retail trade, utilities and professional, scientific and technical services. These industries will also drive demand for graduates with post-secondary qualifications, making it essential that institutions take note and pivot curriculum development to meet future demand and equip graduates with the skills needed by employers.

Canada's future economic potential is at risk if these labor market shifts go unchecked. As the QS World Future Skills Index notes, Canada's Economic Transformation potential lags behind the G7 and other members of the Big Four student destination markets, highlighting an important gap between education outcomes and broader economic impact. This is largely down to two factors: research and development (R&D) investment levels trailing global competitors, and high young person unemployment. Addressing this issue requires action from multiple stakeholders through R&D commercialization, innovation diffusion and the translation of academic excellence into sustainable, productivity-led growth.

Higher education has its part to play here too. Institutions need to strengthen partnerships with industry, align curricula to workforce needs and increase their focus on experiential, work-based learning. Scaling up R&D commercialization will help to create future-ready curricula, and therefore future-ready graduates, and increased income.

To drive economic growth, universities must harness the entrepreneurial potential of international graduates and turn institutions into value-creation centers. It's clear that students looking to study in Canada have a focus on graduate employability and positive work-based outcomes when making decisions about their studies, meaning it is essential that institutions pivot their recruitment strategies to incorporate this. Data from the QS International Student Survey highlights that this focus on employability is heightened among prospective students from South and East Asia – two regions that will be crucial in determining future levels of inbound student flows to Canada. Strengthening employability outcomes will enable institutions to attract the best students from a comparatively limited pool of potential candidates. The international student also risks limiting institutions' ability to translate strong education systems into long-term economic growth.

Canada's higher education system stands out as a global leader in workforce alignment and in future-skills readiness, however there is currently a mismatch between education outcomes and their broader economic impact. It is vital that Canada scales up research commercialization and industry collaboration to produce graduates who can help address high-impact, in-demand skills gaps.

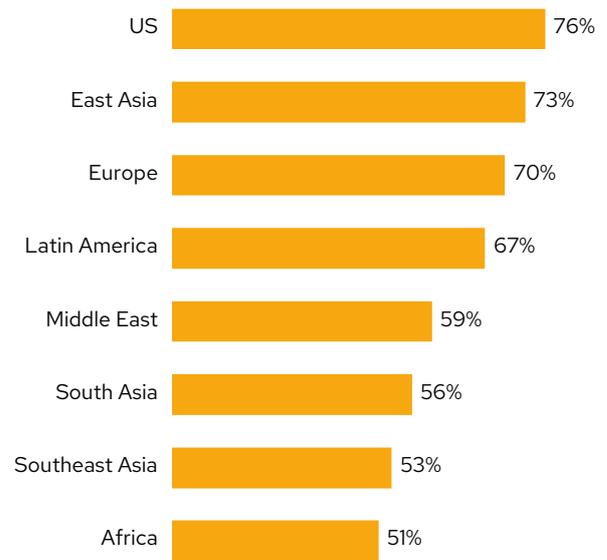
International Student Trends

Reputation Is a Significant Risk Factor for Canadian Institutions

For students looking to study in Canada, reputation is an increasingly important factor. In Canada’s second largest source market – East Asia – nearly 75% of students say reputation is important when deciding which university to study at. In all markets, 60% of students say reputation is important (Figure 13).

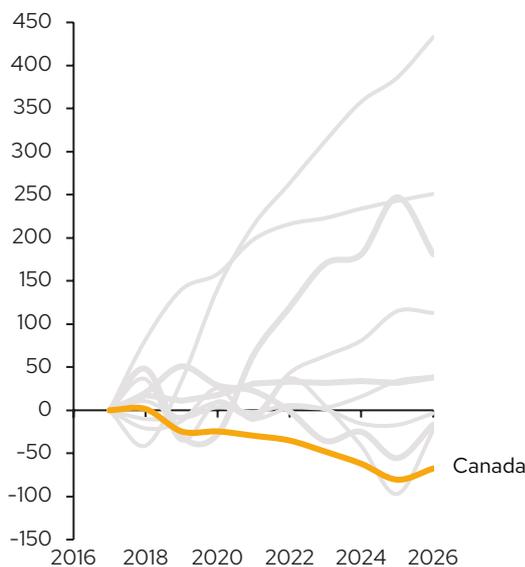
However, the median Academic and Employer Reputation rank of Canadian institutions has seen a significant decline since 2017, making overall reputation a real risk factor for institutions looking to increase inbound student flows (Figures 14 and 15).

Figure 13. Importance of Reputation to Students When Choosing a University



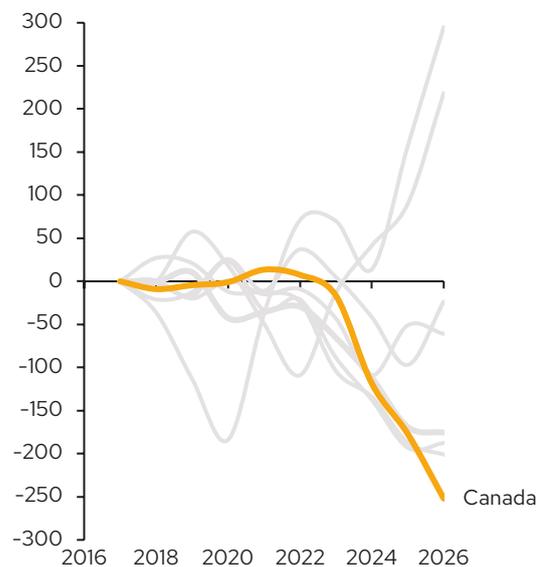
Source: QS Global Student Flows, October 2025

Figure 14. Change in Median Academic Reputation Rank Since 2017



Source: QS World University Rankings

Figure 15. Change in Median Employer Reputation Rank Since 2017



Source: QS World University Rankings

While fellow Big Four countries have seen declines, other nations have seen their reputation rapidly grow, and now threaten the hegemony of the Big Four. While these countries – such as the UAE, Saudi Arabia, and Malaysia – currently face constraints around capacity, infrastructure, and proven career outcomes, they still pose a future risk to Canadian flows, should they solve these problems.

It's vital that institutions have the necessary regulatory support to maintain their global status, as their reputation has seen a significant decline in the last 10 years. Rebuilding reputation should be a key pillar of institutional

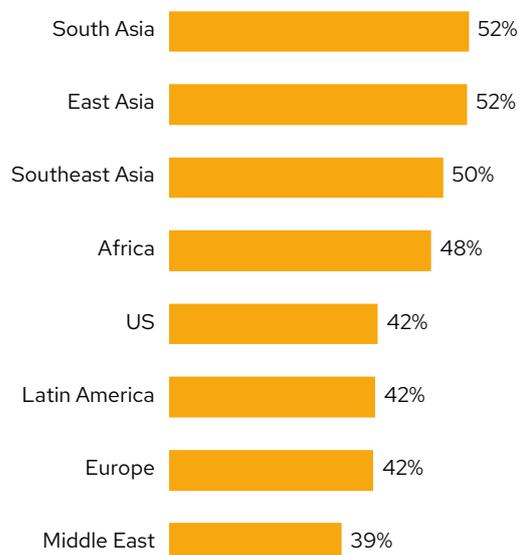
strategy, as it will enable Canadian universities to harness international student flows from the US, Europe, and East Asia – crucial source markets for future growth.

Additionally, students draw an implicit association between reputation and ranking performance: 71% of students say that good performance in rankings is indicative of a good reputation. This is compounded by the fact that only 12% of students looking at Canada will prioritize an institution's rank without also prioritizing reputation. Ranking performance is also one of the most important factors to students when gauging teaching quality at an institution, cited by 60% of students.

Employability is Key for Prospective Students

Post-study employment prospects are a vital consideration for most students. Nearly half of all students looking to study in Canada say that information on work placements and links to industry are key topics they want to hear about in marketing materials (Figure 16).

Figure 16. Marketing Communication Preferences: Percentage of Students Selecting "Information on Work Placements and Links to Industry"



Source: QS Global Student Flows, October 2025

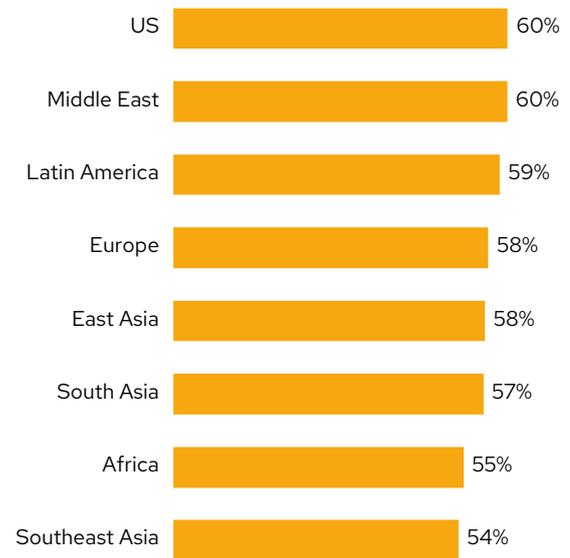
Regardless of region, a majority of students say that when thinking about career considerations while choosing a course, they base their decision on whether the program allows them to learn new skills (Figure 17). Evidently, students view their time at university as the ideal opportunity to upskill and to learn how to articulate the value they can add to prospective employers through the skills they acquire.

This eagerness should help solve another issue facing Canadian institutions: the dissonance between actual employment outcomes of students from Canadian institutions, and their institutions' Employer Reputation (Figure 18).

Canadian institutions are able to deliver positive graduate outcomes, with graduates securing jobs at high rates, and alumni going on to make a meaningful impact on society. However, Canada's reputation among employers is significantly lower than these strong graduate outcomes would suggest. Leveraging the successful narratives of graduates will be critical to reversing the decline in Canada's Employer Reputation.

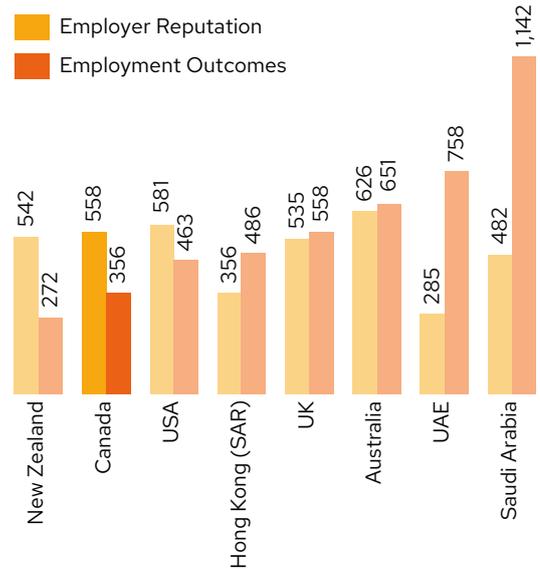
Rebuilding Employer Reputation will be critical as Canadian institutions fight for market share. In a world where students prioritize graduate outcomes, data-driven narratives that showcase return on investment will resonate with students looking to study in Canada.

Figure 17. Career Considerations When Choosing a Course: Percentage of Students Selecting "It Allows Me to Learn New Skills"



Source: QS Global Student Flows, October 2025

Figure 18. Average Employer Reputation Rank vs Average Employment Outcomes Rank



Source: QS World University Rankings 2026

Strategic Imperatives for 2030

This report urges leaders of higher education institutions in Canada to fully analyze the factors that are likely to influence global student flows. As national policy creates a challenging recruitment environment, universities need to plan for a range of scenarios in order to be agile and adaptable.

Equip Graduates With the Skills Employers Need

Employers are not entirely satisfied with the skills their graduate employees have. Higher education institutions must work to align curricula to industry needs, to rebuild reputation among employers, and, in turn, be able to show prospective students the potential return on investment of study. Increasing focus on lifelong learning initiatives may be another way to achieve these goals.

Mitigate Decreasing Numbers of In-Person Students Through TNE, Targeted Recruitment, and New Funding Sources

The contraction of student numbers we have forecast in this report will mean that changes are required across Canadian institutions. While we caution against knee-jerk reactions in the face of dramatic policy shifts, new models of learning, such as innovative digital delivery and off-shore campuses, or focusing on generating revenue through spinouts and research commercialization should be considered as part of future strategy planning.

Declining Reputation Is a Key Challenge to Be Solved

Whatever shape the market takes in the later half of the 2020s, reputation is going to be a significant driver of student flows into Canada – historic reputation is likely to remain an important factor for students, even while emerging destinations improve their reputation. A majority of students cite the importance of reputation when making study decisions, so, for Canadian institutions, rebuilding and maintaining institutional reputation is paramount.

Methodology

Global Student Flows

The Global Student Flows (GSF) initiative comprises three core components: QS's *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.

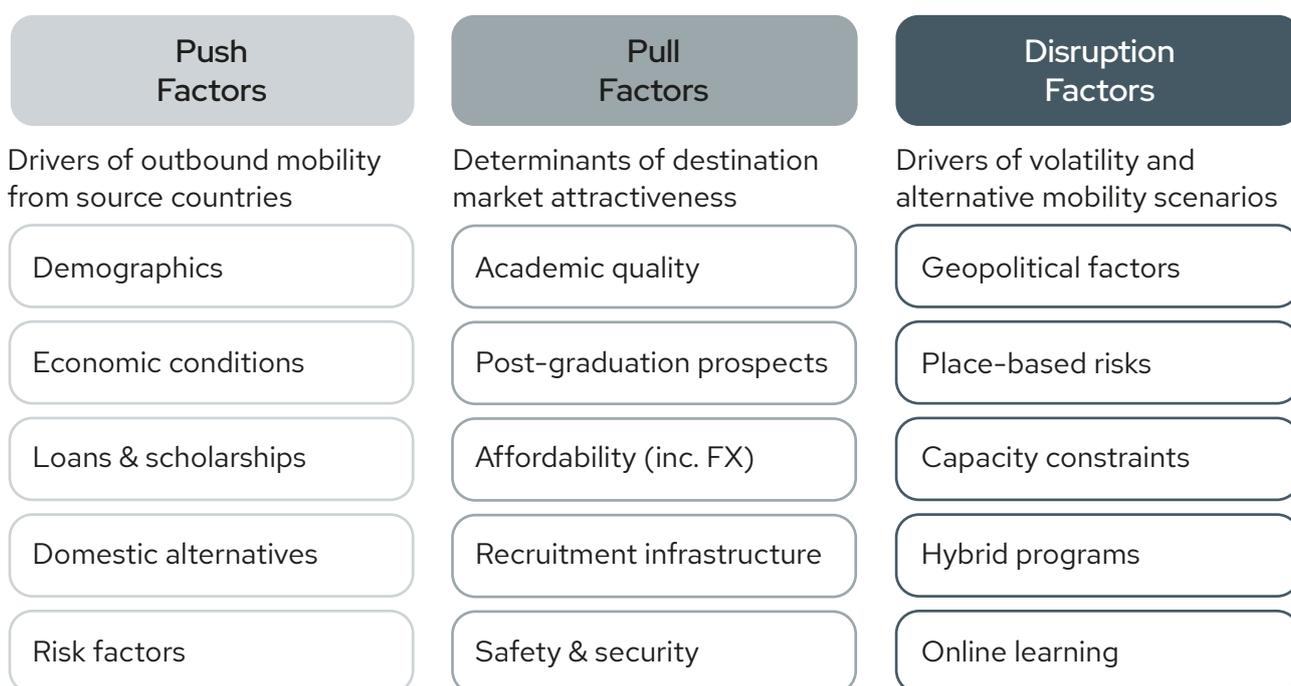
Open Source Framework

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 organizes 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's 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 modeling, the GSF framework delivers a robust, adaptive foundation for understanding the forces shaping global student mobility – past, present, and future.



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 analyzes population trends and structures within source countries, including youth population growth, urbanization, 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 recognized academic programs.

Post-Graduation Prospects

This factor examines the availability and attractiveness of work opportunities. It includes the accessibility of internships, co-operative education programs, 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 & 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 Programs

Hybrid delivery models, combining online and in-person components, represent an evolving alternative to traditional mobility. These programs 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 analyze 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 analyze 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.

Global Student Flows Interactive Flows Explorer Tool



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 modeling 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)

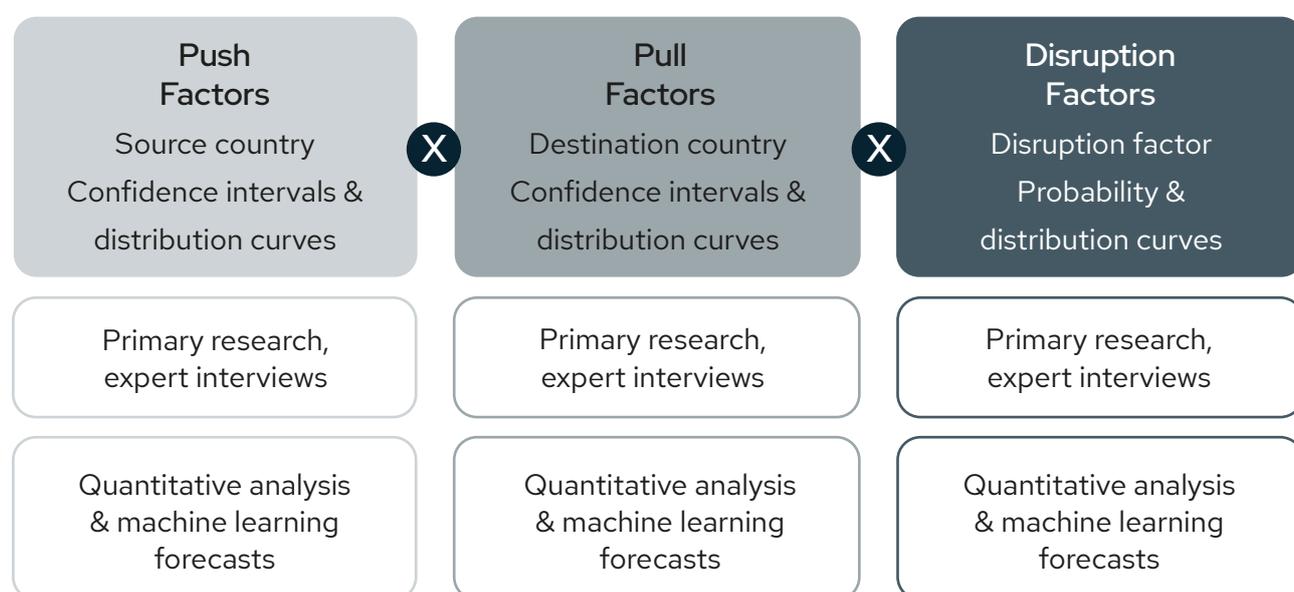
Each factor is associated with a statistical distribution and confidence interval derived from a combination of primary expert interviews and historical quantitative data. Push and pull factors each generate growth rate distributions for every source and destination country respectively, while disruption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

For each simulation run, randomized values are sampled from these distributions to produce one unique realization 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 uses 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.

Global Student Flows: Open-Source Framework



Source: QS, Global Student Flows. This work is licensed under CC BY-SA 4.0

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-enrollment journey. We want to know what students prioritize 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.

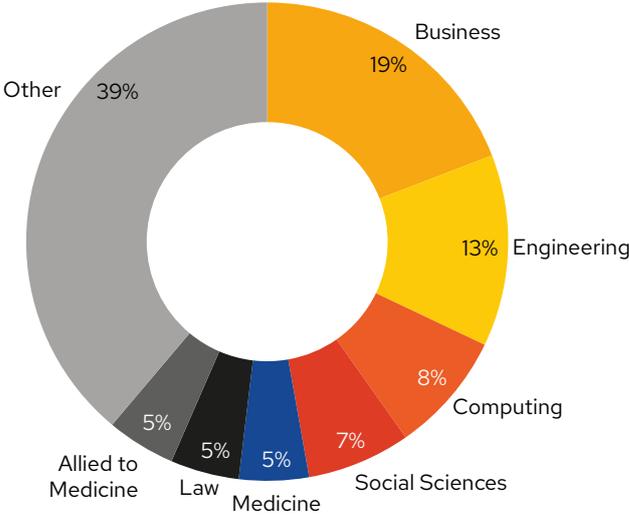
The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 146 universities worldwide, who were invited to share the Survey with their own prospective international students.

Fieldwork for the Survey was conducted between January 6 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.

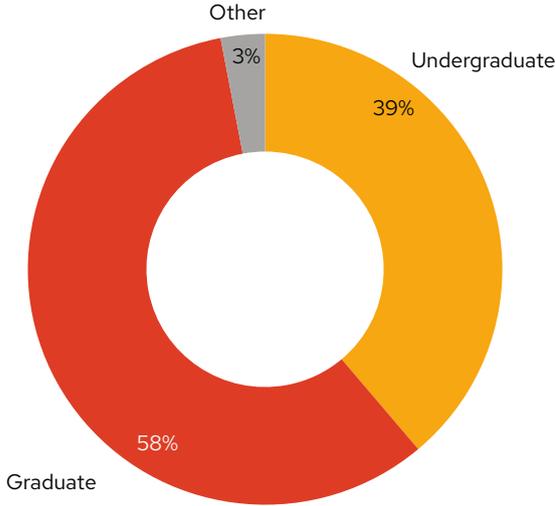
The 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey Respondent Demographics

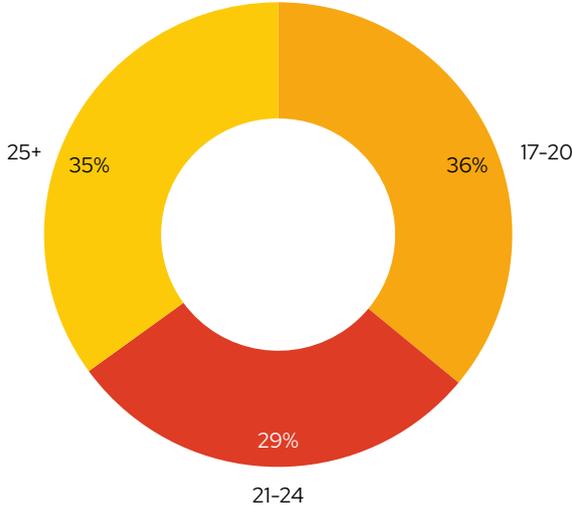
Subject Preference



Study Level



Age



Source: QS Global Student Flows, October 2025

Sign up for the
QS International
Student Survey
2026



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 specialized education bodies, the model integrates both inbound and outbound mobility data across all major world regions. These sources reflect the latest available figures on enrollments, visas, migration, scholarships, and institutional capacity, and are harmonized to support robust forecasting and scenario analysis.

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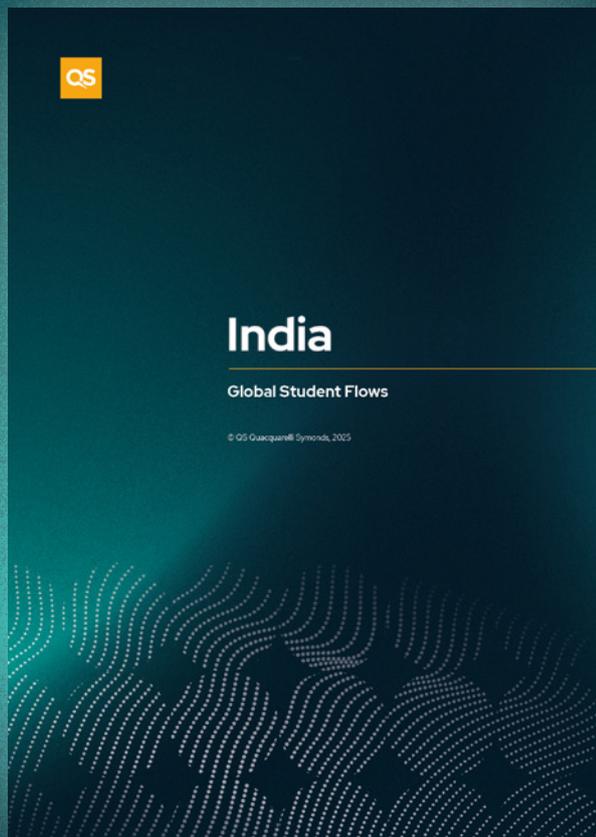
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