



UK

Global Student Flows September 2025

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Foreword



Selma Dröfn Toohey
Executive Director
QS Quacquarelli Symonds

I am pleased to present the **Global Student Flows: UK report**. For the past eight years, the Global Student Flows initiative has provided trusted insights for policymakers, universities, and sector leaders.

This year, the Initiative has taken a major step forward and combines QS datasets – including the International Student Survey and institutional performance data – with our student mobility flows. We can now offer a richer, more comprehensive perspective on the UK's international education landscape.

The UK has long been one of the world's most attractive study destinations, drawing students with its academic excellence, cultural diversity, and global connections. Yet the landscape is shifting. As universities in traditional 'sending markets' build their own international reputations, and the UK government restricts inbound student flows, UK universities must do even more to mitigate risk, move towards financial sustainability, and, perhaps, create growth.

This report takes a wide-angle view of international student mobility, with a particular focus on the UK. Using an evidence-based framework, we model potential futures for student recruitment through to 2030 across three scenarios: Regulated Regionalism, Hybrid

Multiversity, and Talent Race Rebound. These scenarios provide higher education leaders with the foresight needed to plan confidently for the decade ahead.

We also examine inbound and outbound mobility patterns for the UK and forecast student numbers for 2030. Combined with fresh insights from the QS International Student Survey, this analysis generates practical recommendations to help UK universities refine recruitment, engagement, and retention strategies. At QS, we remain committed to supporting the UK's higher education sector as it navigates this ever-changing environment. The insights presented here represent only the beginning of what is possible in partnership with QS.

Our teams provide advanced analytics for global benchmarking, connect universities with prospective students, and foster innovation and skills development to underpin sustainable growth. We are the partner with deep, data-driven knowledge of global higher education who can help you understand the role your institution can play amid these uncertain times – and empower you to get there.



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

UK set to lead 'big four' in international student growth

UK international student enrolments are projected to grow 3.5% annually to 2030, faster than others in the 'big four', but slower than Europe's 5% and below the post-pandemic surge. Growth will be shaped by tighter visa rules, shifting demands from students in key source markets, and rising competition from new regional hubs. Post-study work rights remain a key draw, but potential policy changes could erode the UK's competitive edge. Africa and Southeast Asia are expected to drive growth, while the EU and Middle East contribute modestly.

India and China will remain the UK's largest markets. Indian enrolments are set to rebound but at a slower pace, while Chinese numbers stagnate amid domestic economic pressures and improving institutions in China and the wider Asia Pacific region. African nations' youthful populations and expanding middle classes will boost demand, but regional hubs are starting to compete for market share.

Intensifying global competition for international students

Reputation is playing a bigger role in student decision-making, with over 70% of UK-bound students (other than those from South Asia and Africa, where the number was over 60%) citing it as important. However, UK institutions face challenges as new hubs of high-quality education are emerging across the globe, particularly in the Middle East, China, India and Southeast Asia. At the same time, growing numbers of competitors are offering high-quality, lower-cost education which is also a factor in eroding the UK's long-established standing.

Labour market demands offer an opportunity for UK universities

UK universities have a pivotal role in addressing the country's growing skills shortages, with demand for nearly a million additional workers in digital, social care, construction, and engineering by 2030, according to Skills England. Aligning curricula with employer needs and embedding employability into education will be critical to closing these gaps, boosting productivity, and driving economic growth. International students, supported by pathways like the Graduate Route visa, are a vital part of this strategy, helping fill immediate labour shortages while sustaining long-term prosperity. To remain competitive, universities must strengthen industry links, co-develop future-focused programmes, and position employability at the core of their value proposition to both students and employers.

Three scenarios to enable strategic planning

To help UK institutions plan for the future, we have defined three evidence-based scenarios and applied a UK lens to assess what the future of higher education may look like in 2030.

In the **Regulated Regionalism** scenario, the UK adopts stricter, centrally managed policies that prioritise reducing net migration over student growth, with bans on dependants, tighter visa compliance, and higher costs reducing demand. This selective approach makes enrolment more rigid, pushing students toward alternative destinations – including emerging education hubs across Asia – while UK universities face rising regulatory and reputational pressures.

In **Hybrid Multiversity**, students complete much of their degree offshore, online or at partner institutions, before coming to the UK for shorter, hands-on study and industry-linked experiences. This flexible, lower-cost model sustains UK university revenue without adding to net migration but would require significant reforms to UK visa and education frameworks, and meaningful investments in new partnership development.

Talent Race Rebound is a scenario where international education is repositioned as a tool for addressing UK skills shortages, with flexible visa pathways and targeted migration routes for priority fields like healthcare, tech, and engineering. This outcomes-based approach makes the UK more attractive to high-value students by linking study with clearer postgraduation career and residency opportunities.

Strategic challenges

The UK higher education ecosystem is uniquely positioned to drive innovation and economic growth, as well as continue supplying talent that industry requires. However, there are some key challenges that need to be addressed.

1. An enduring skills gap between graduate skills and industry need

While graduates from UK universities are getting hired, they are not seen to be fully equipped with the necessary skills, indicating a misalignment between industry and UK higher education.

2. Emerging hubs of international education outside the 'big four'

The attractiveness of destinations in Asia for international higher education is growing. With growing international reputation for research, facilities and student life, emerging hubs of international education present new competitors in an already competitive marketplace.

3. Forecast growth not enough to mitigate increasing costs

This report predicts that UK international student numbers are projected to grow 3.5% annually until 2030, but this will not be enough to fully support universities through a challenging financial period and increased costs. While sources of income for higher education in the UK continue to shift, new models of learning, funding through spinouts, funding grants and endowments will need to be fully utilised.

2030 outlook

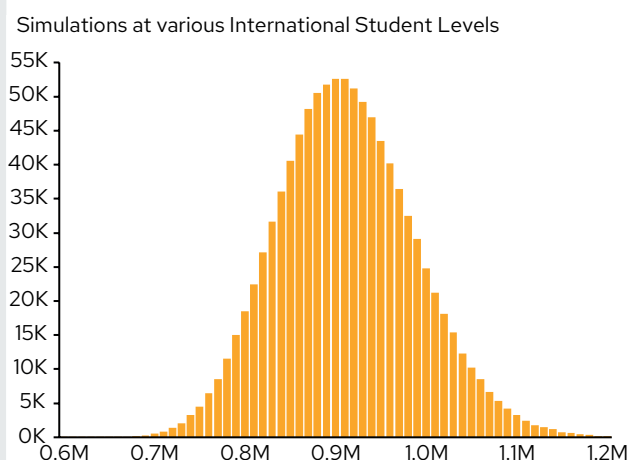
Between now and 2030, the number of international students in the UK is expected to continue expanding at a moderate rate of 3.5% annually. Comparatively, other major Anglophone destinations are forecast to expand more slowly, but the UK is forecast to grow at a slower rate than the 5% anticipated for the broader European region. This moderation reflects tighter visa policies, particularly restrictions on dependants, alongside the global redistribution of students as new destinations gain appeal.

The forecast is slower than the immediate post-pandemic period where enrolments surged at a double-digit rate of 11% between 2019 and 2022, driven by pent-up demand and generous post-study work rights. The outlook for international student flows to the UK over the next decade is shaped by a combination of demographic trends, economic conditions in source countries, and policy shifts at home. After several years of volatility following Brexit and the pandemic, demand is expected to recover modestly, but the trajectory will be uneven across markets.

Several factors underpin the broader growth outlook. Post-study work rights remain a key differentiator, particularly for students from Asia and the Middle East. According to the QS International Student Survey, 60% of students from Asia are planning to remain temporarily or permanently after completing their studies. Exchange programmes, scholarships, and university partnerships will sustain medium-term pipelines, while economic expansion in source markets drives the middle-class demand that feeds long-term flows. At the same time, demographic contraction in key markets, cost pressures, and competition from emerging regional hubs temper overall growth, underpinning the outlook for UK enrolments expanding at a measured pace rather than in sharp bursts.

The upcoming period projects diverging trends in the UK's two largest source markets; India and China. In India, following a temporary decline in 2024, enrolments are beginning to rebound. While growth is not expected to match the pace seen between 2019 and 2024 (43%), largely

Figure 1. Simulation frequency for total international students to the UK in 2030



Source: QS Global Student Flows, September 2025

due to the earlier boost from the graduate route visa and the moderating effects of recent UK policy changes. Nonetheless, enrolments are projected to increase, supported by resilient demand from upper-income segments and the continued appeal of the graduate route as a pathway for long-term migration, which sustains selective inflows.

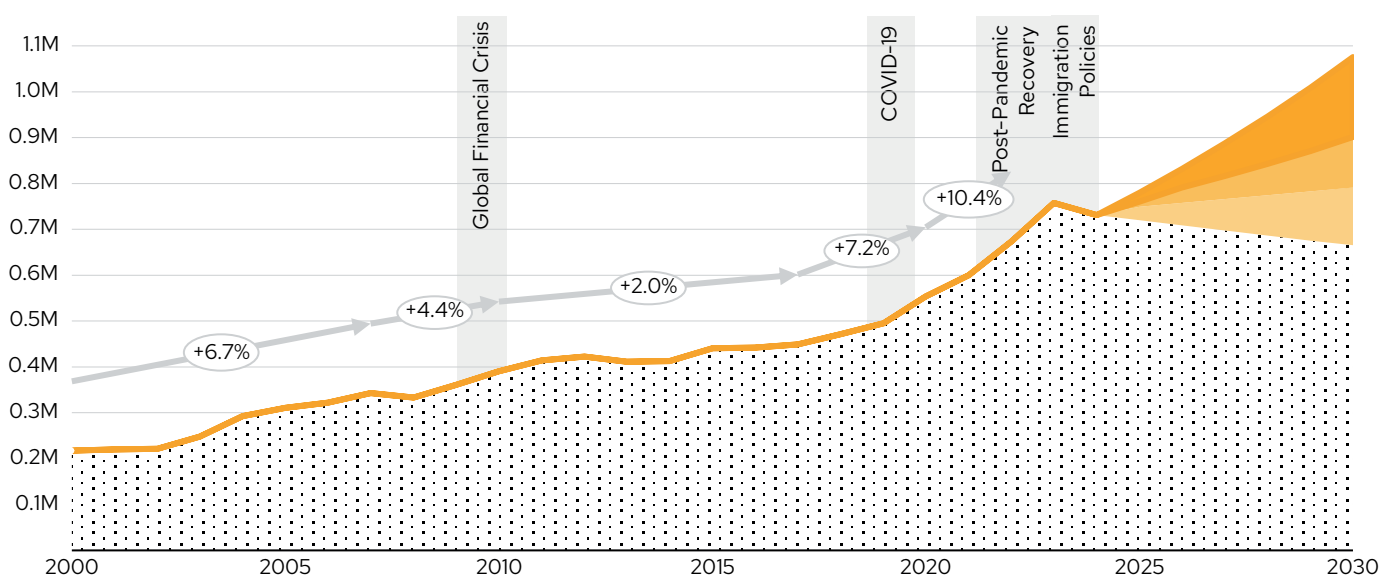
In China, economic strains are constraining household budgets, prompting prospective students to consider closer regional alternatives or domestic programmes. Undergraduate acceptances from China have also recently begun to drop reflecting broader shifts including increasing competition from domestic alternatives. Despite this, high-end segments remain willing to pay for Western degrees, and lower projected enrolments in the US and Canadian institutions could redirect some Chinese students to the UK. Overall, growth in Chinese enrolments is expected to be largely stagnant during this period.

In other parts of the world, Africa is emerging as a strong growth region, driven by rapidly expanding youth populations, rising middle-class incomes, and ongoing demand for affordable and high-quality international education, though affordability remains a key constraint in some countries. By contrast, Europe's contribution to UK student inflows is more muted; flows are steady but modest, constrained by Brexit-related reforms and increased intra-EU mobility options. The Middle East is expected to be one of the slowest-growing regions for UK-bound students, as countries like the UAE and Kuwait increasingly restrict outward mobility while focusing on developing local universities to become regional hubs.

Although the outlook for the UK is stronger compared to its main competitors amongst English speaking study-destinations, this view is not without risks. The recent tightening of student visa policies, particularly the ban on dependants for all but a few postgraduate

students, has introduced a significant element of risk. The UK's policy landscape stands in contrast to traditional top destinations like Canada and Australia, which have long been favoured for their clear post-study work rights and immigration pathways. While Canada has introduced its own caps, and the US has its own visa issues, both of these factors could redirect some students to the UK. However, the UK's own contractionary policies could diminish its competitive edge, particularly in the minds of students from markets like India, where a pathway to permanent residency has become a key consideration. This policy-driven uncertainty is compounded by the rise of new regional hubs. Destinations like Hong Kong (SAR) and Malaysia are actively targeting Indian students, while the UAE's strategy to become a regional education hub and improve its domestic universities poses a direct competitive threat to the UK's ability to attract students from across the MENA region.

Figure 2. Total international students in the UK, 2000-2030F

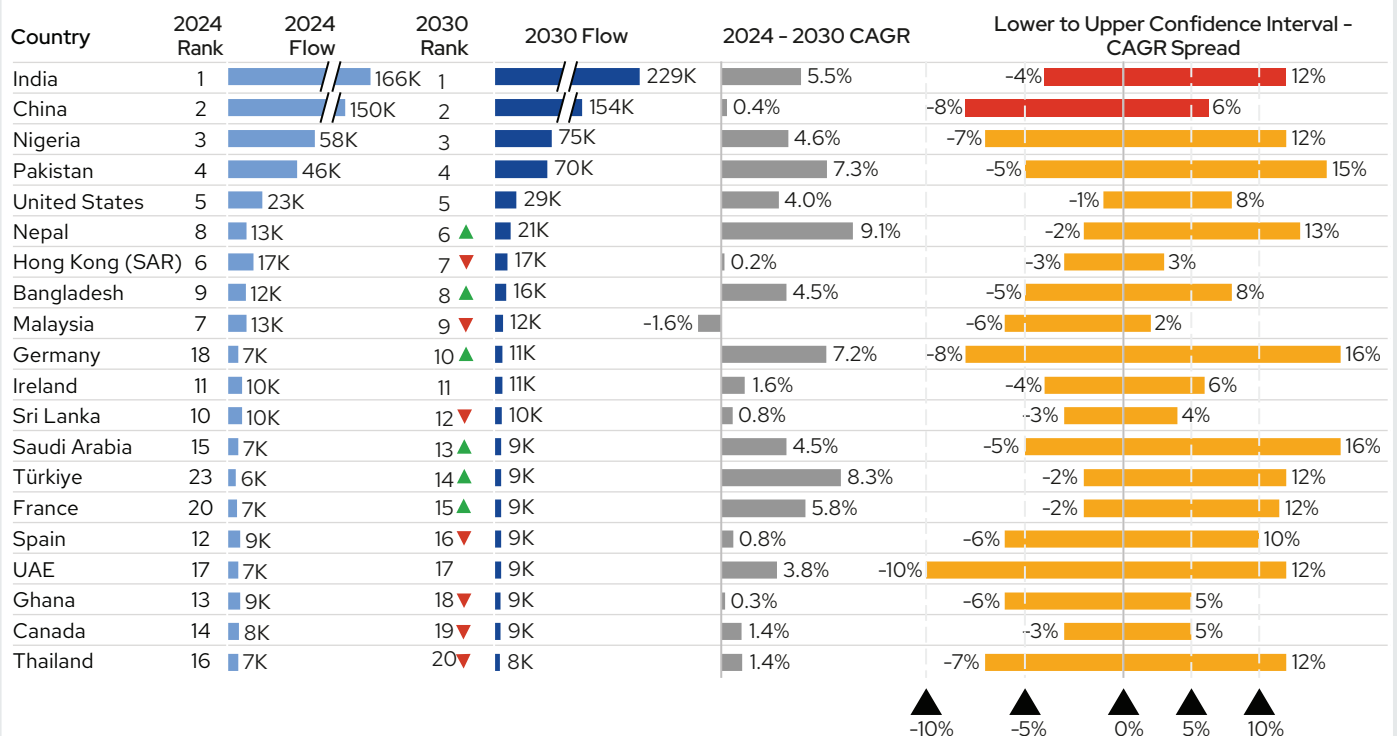


Source: QS Global Student Flows, September 2025

The outlook is no longer a simple narrative of growth from all regions across the world. Instead, the UK's future student flows will be a balancing act between attracting high-value students from stable and wealthy markets and mitigating the policy and economic risks in its most populous, and historically largest, source countries. The landscape will be marked by increased volatility, with a constant need to adapt to economic, demographic, and geopolitical shifts. The UK will likely see a more

diverse student mix, with a growing number of students from dynamic economies in Southeast Asia and the Middle East, while flows from traditional mainstays like India and China, and from the post-Brexit EU, become more selective and policy-sensitive.

Figure 3. Top 20 source countries to the UK, 2024-2030F



Source: QS Global Student Flows, September 2025

The three scenarios for 2030

and how they impact the UK



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

Under Regulated Regionalism, the UK is likely to adopt a more restrictive and centrally-managed approach to international education. This scenario sees the government implementing policies aimed at reducing net migration rather than increasing student numbers.

As enrolment becomes more selective, application processes become more rigid, with a focus on reducing net migration. The ban on most international students bringing family members (dependants) to the UK, with the exception of those on postgraduate research courses and government-funded scholarships, continues to have a profound effect on applicants from key source markets such as India, Nigeria, and Pakistan, where bringing family was a major factor in choosing a study destination. According to the QS International Student Survey, students from Pakistan were twice as likely as the global average to bring a spouse or partner with them while studying abroad with candidates from Nigeria more than three times as likely.

Under the current and proposed policies, universities must also meet more stringent visa compliance rules or face penalties, such as a minimum of 95% enrolment and 90% completion rates for their international students. Institutions could also lose their ability to sponsor student visas if more than 5% of their student visa applications are rejected. This has led some institutions to reduce or suspend recruitment from certain countries deemed “higher risk”.

Further regulatory complexity and rising costs could lead some students to consider alternatives. While the UK’s post-study work offer, the Graduate Route, has been subject to review and potential changes, uncertainty remains. This, coupled with higher visa fees and the dependant ban, has contributed to a decline in international student demand, particularly for postgraduate taught courses. These restrictive policies, while designed to reduce net migration, have created an opportunity for other countries, including those in the Asia-Pacific region, to attract students who might have otherwise chosen the UK. This includes students from major source markets like India and China who might be increasingly likely to choose education destinations which are closer to home.

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

Hybrid Multiversity

The Hybrid Multiversity model shifts the international student journey by moving the initial phases of a degree offshore. Students begin their studies either online or at partner institutions in their home countries. This allows them to complete the initial stages of their learning before travelling to the UK for a shorter, more concentrated period of on-campus learning. The in-person component is focused on practical experiences such as internships or hands-on training, which are difficult to replicate remotely.

This model relies on credit transfer systems to ensure a smooth transition for students moving between different delivery sites. Courses would be standardised to meet UK academic standards, allowing for a seamless integration of offshore and onshore learning. By recognising micro-credentials and modular study, universities enable students to progressively build their qualifications. The final stages of the programme in the UK often culminates in industry-linked experiences or capstone projects, which are crucial for preparing students for the workforce and are a key reason for the on-campus presence. This structure reduces the time and cost associated with a traditional three-year degree, making UK education more accessible and appealing to a broader international audience.

The UK's immigration policies, which have become more restrictive, would also play a role. UK government forecasts indicate that the proposals in its April 2025 immigration White Paper aimed at tightening visa rules, could cut 12,000 applicants from the Graduate Route and 19,000 from the Student Route. The hybrid model could offer a way for universities to maintain revenue streams and international presence without contributing to net migration numbers, aligning with the government's dual goals.

However, the UK would need to navigate this landscape carefully. The government's current visa rules on remote learning are strict, typically allowing a maximum of 20% "remote delivery" for a course. Any wider adoption of a hybrid model would require careful alignment with Home Office regulations to ensure compliance and avoid jeopardising a university's ability to sponsor student visas.

Courses would also adapt by offering preparatory learning through blended delivery. Students could begin learning remotely and travel to the UK to transition to immersive learning when academic study starts. Institutions would reserve their physical campuses for activities that require hands-on learning, such as lab work and employer engagement. Campuses would increasingly specialise, and digital infrastructure would be strengthened to support offshore learners.

This model presents a more affordable, flexible alternative to full on-campus degrees, offering a way for universities to maintain revenue streams and international presence without contributing to net migration numbers. The UK can leverage its strong global brand and the reputation of its leading universities by focusing on the quality of the on-campus experience. The country's unique cultural heritage and vibrant city life remain powerful draws for students seeking an immersive international experience, even if a portion of their degree is completed remotely. The model would require major reforms to the UK's visa and education frameworks.

Talent Race Rebound

Talent Race Rebound outlines a scenario in which international education becomes a strategic tool for addressing skills shortages and demographic challenges. Following a period of tightening visa controls, particularly a ban on dependants for most international students and proposed changes to the Graduate Route visa, the UK government, in this scenario, repositions international education as a targeted pathway to attract and retain younger, highly-skilled talent in priority sectors.

Under this model, the UK adjusts its policy settings to reflect a more selective, outcomes-based approach. While overall international student numbers are being managed, exemptions and targeted pathways remain for priority groups such as research students and those in high-demand fields like healthcare, engineering, and technology. In these areas, visa pathways and sponsorship rules are applied more flexibly, aligning education and immigration policy with the country's national workforce needs.

In this scenario, the UK would also redesign its post-study work rights. Proposals to shorten the two-year Graduate Route visa could be re-evaluated, and the Skilled Worker visa could be made more accessible for UK graduates. This would involve a points-based system where international graduates with UK qualifications and relevant work experience earn additional points. Salary thresholds for jobs in critical shortage areas like IT and advanced manufacturing would also become more flexible. This incentivises students to pursue careers in sectors with the most pressing labour needs.

For international students, this model presents a strong value proposition, offering recognised qualifications, clearer migration pathways, and growing job opportunities in key industries. For the UK, this scenario would be particularly appealing to students from India, China, and Nigeria, who are the largest sources of international students for the UK.

Ultimately, this scenario is a shift from open-ended migration toward a more selective, outcomes-based model. International education is positioned not just as a valuable export industry, but as a crucial pipeline for skilled migration. Students who meet specific criteria in terms of age, language, and qualifications are recognised as future contributors to the UK's workforce and economy.

Outbound trends

Study abroad

Before the pandemic, outward student mobility from the UK was on an upward trajectory, rising from 36,400 students in 2015/2016 to 50,875 in 2018/2019. This mobility includes a variety of programmes, from full degree programmes to shorter-term exchanges, internships, and summer schools. In 2018/2019, 21% enrolled in short-term mobility programmes lasting four weeks or less.

The pandemic disrupted this growth, causing a sharp decline in outbound student numbers to 14,000 in 2020/2021. This was due to border closures, travel restrictions, and health concerns. Additionally, the UK's departure from the EU ended access to the Erasmus+ funding programme, which had supported student mobility across Europe. In response, the UK launched the Turing Scheme in 2021 as a global replacement to support UK students studying and training abroad. In its first year, nearly 30,000 placements were supported across 150 study destinations, with growing interest in the US and Canada. It should be noted that there are early-stage discussions about the UK returning to Erasmus+.

From 2022 onwards, universities adapted by offering more hybrid and virtual options alongside traditional overseas placements. While the most popular destinations remain the US, Australia, and Europe, students are increasingly choosing Asia Pacific locations such as Indonesia, attracted by affordability, academic partnerships, and regional career opportunities. The Turing Scheme continues to expand opportunities for students from across the UK, particularly those from

underrepresented backgrounds, to access global study and work placements. Over the next three to five years, UK outbound student mobility is expected to stabilise and diversify further, with universities focusing on inclusivity and aligning mobility programmes with international student needs for employability and academic development.

Looking ahead, UK universities are likely to place greater emphasis on strategic partnerships and region-specific programmes to enhance the appeal of outbound mobility. By tailoring courses and internships to emerging global industries – such as technology, green energy, and finance – institutions can better align student mobility with career outcomes. There is also an increasing focus on equity and accessibility, ensuring that students from underrepresented and lower-income backgrounds can participate in international experiences. Combined with growing digital and hybrid mobility options, these measures are expected to sustain interest in overseas study while diversifying the destinations and opportunities available to UK students.

Transnational education

With growing political pressure on migration, transnational education (TNE) remains a key strategy for UK universities to grow their international presence. Among the different TNE options, offshore branch campuses give the most control over teaching quality and branding. However, their high operating costs have limited widespread adoption.

Asia and the Middle East continue to dominate as host regions, with countries like Malaysia, China, and the UAE reflecting both strong demand for UK degrees and long-standing institutional ties. In the 2022/23 academic year, 66% of TNE students were undergraduates and 34% were postgraduates. China, Sri Lanka, and Malaysia collectively accounted for over 30% of all TNE students pursuing UK qualifications, while all EU countries combined made up 16%.

Unlike the more expansive models of the past, today's UK branch campuses are increasingly established through strategic partnerships and joint ventures, enabling more sustainable operations. This shift reflects a broader trend in the UK's TNE strategy, prioritising quality, regional alignment, and long-term viability in an increasingly competitive global education market.

TNE through branch campuses remains a vital component of international engagement. The UK is one of the global leaders in this space, with more than 40 international branch campuses that enrol around 458,000 students across various regions, according to C-Bert data. While it trails the United States, which leads with more than 80 campuses, the UK maintains a strong and growing presence, particularly in regions such as Asia and the Middle East. Other English-speaking countries are also expanding their branch campus footprints. Australia, though active, remains behind the UK in terms of overall scale. Canada, with less than 10 branch campuses, is in the early stages but is taking strategic steps to expand its presence. These developments highlight the need for UK universities to maintain high-quality delivery, nurture strong partnerships, and strategically position themselves internationally to remain competitive.

To enhance the global reach, popularity, and impact of their TNE initiatives, UK universities need to address key challenges at every stage of planning and delivery. With student enrolments from regions like Southeast Asia showing signs of slowing – partly because countries such as Malaysia, Singapore, and Thailand are developing themselves as regional education hubs – having a strong TNE presence can help UK institutions maintain visibility, sustain engagement, and partially offset declines in on-campus enrolments.

Online and hybrid transnational education

Online TNE has become a defining pillar of the UK's international education strategy, allowing students globally to access British qualifications without leaving their home countries. Over the past decade, this model has grown steadily, reflecting both the enduring global demand for UK degrees and the flexibility online study offers to students balancing work, family, and financial constraints.

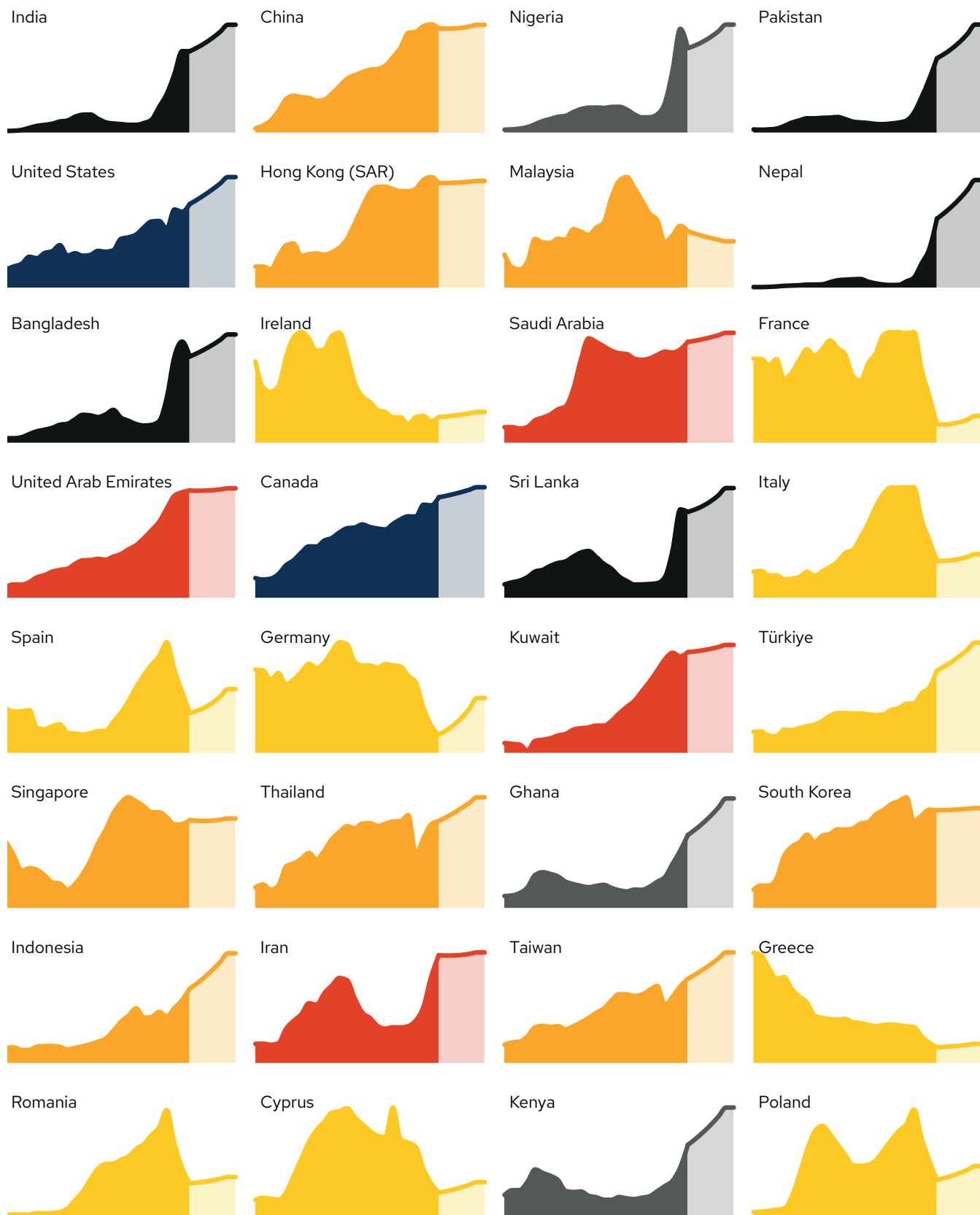
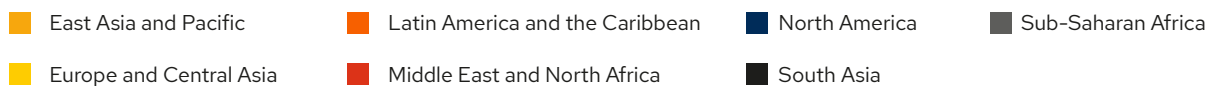
Asia remains the UK's strongest market for online TNE, with European, Middle Eastern, and African students also forming significant cohorts. Demand spans both undergraduate and postgraduate levels, though recent patterns suggest that the once-surging postgraduate market is beginning to plateau as competition from other providers intensifies. Undergraduate online study, by contrast, continues to expand, appealing to younger learners who are increasingly comfortable with digital-first education.

Certain UK universities dominate the sector, with longstanding pioneers such as the Open University and the University of London building vast global communities of online learners. Others have adopted hybrid models that combine digital teaching with local partnerships, or established branch campuses to blend the familiarity of a British degree with on-the-ground relevance. This diversity of delivery helps the UK maintain a wide reach across varied markets.

Nonetheless, opportunities exist to strengthen the delivery and impact of transnational education. In some regions, students face obstacles such as limited internet access, a shortage of suitable devices, or software and digital tools that may not fully align with local contexts. Similarly, the training of UK faculty for online or hybrid delivery, and the provision of student support overseas, can be uneven, affecting engagement and retention. By investing in region-specific digital infrastructure, culturally adapted pedagogy, and dedicated faculty development, UK institutions can strengthen the quality and appeal of their TNE programmes, helping to maintain enrolments even as local universities in these regions emerge as strong education hubs.

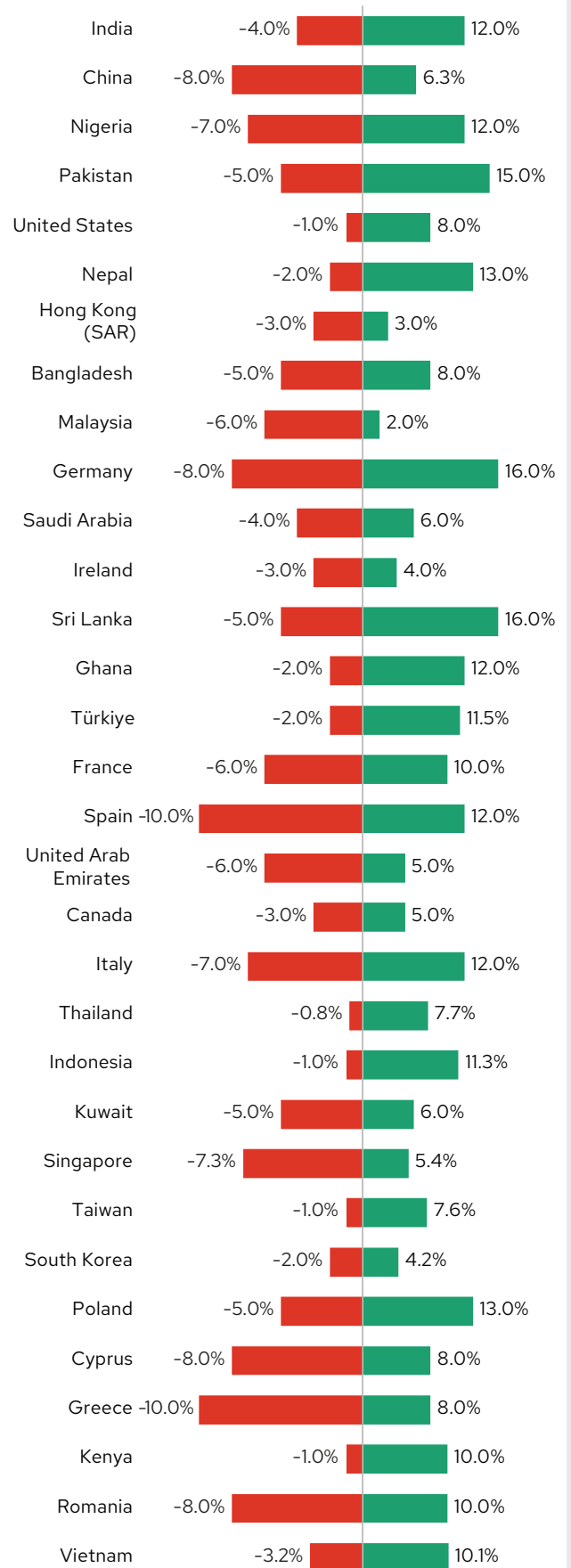
Student origins

Figure 4. UK major student origin growth, 2000–2030f (point estimate growth outlook)



Source: QS Global Student Flows, September 2025

**Figure 5. UK student origin growth outlook.
Lower and upper 95% confidence intervals
2024-2030f**



Source: QS Global Student Flows, September 2025

South Asia

South Asian students have been one of the UK's fastest-growing international cohorts. Their numbers rose by more than 40% annually over the past five years, supported by policies such as the Graduate Route visa. Growth is expected to slow, but the region is still forecast to be the UK's strongest source of students, expanding from 245,000 in 2024 to around 340,000 in 2030.

In 2024, South Asian students accounted for 34% of all international student enrolments to the UK, with India, Pakistan, and Nepal as the top source countries. Several forces are shaping future demand; policies such as the dependant ban may slow growth, while negative sentiment toward other destinations could sustain the UK's relative advantage. At the same time, European countries like Germany and France are emerging as strong competitors, particularly for Indian students.

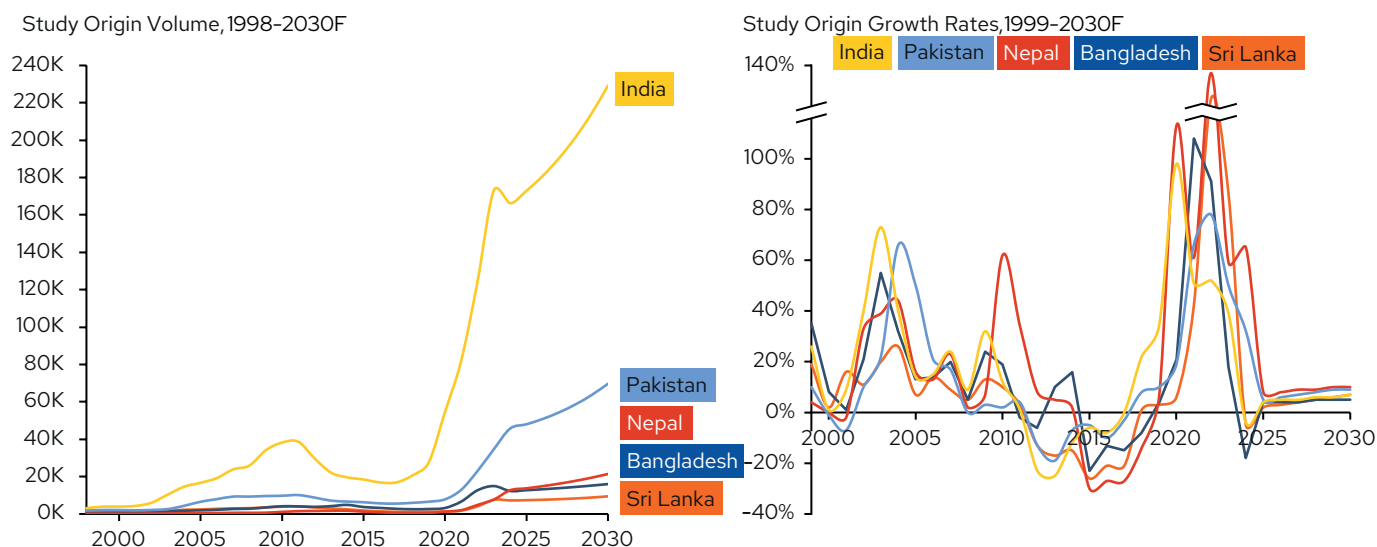
The UK's proposed changes to the Graduate Route, reducing post-study work from two years to 18 months and stricter rules on dependants, could also deter South Asian students. Postgraduate students from India and Pakistan,

who are a substantial share of UK enrolments, would be particularly impacted, as they often use this visa as a pathway to long-term employment and settlement. Study visas dropped 14% in 2024, including a 26% fall from India. Q1 2025 data, however, points to a rebound, led by rising demand from India, Bangladesh, and Nepal.

The response to policy changes is also mixed across the region. Despite an 85% drop in dependant visas for Pakistani nationals, their sponsored student visas grew by 13% in 2024, making Pakistan the UK's fourth-largest student market. Nepal also saw a 65% increase in student numbers, which suggests that while some students are deterred, others are still seeking a UK education, indicating a shift in demand within the region.

However, while Canada and Australia have introduced new restrictions that add uncertainty for South Asian students, the UK has kept its Graduate Route visa – a major driver of enrolment growth from the region in recent years. This appeal will only have been heightened by 73% of students that used the Graduate Route visa reporting that it met their expectations. As a result, the UK continues to hold its appeal to Indian and other South Asian students.

Figure 6. UK student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

East Asia

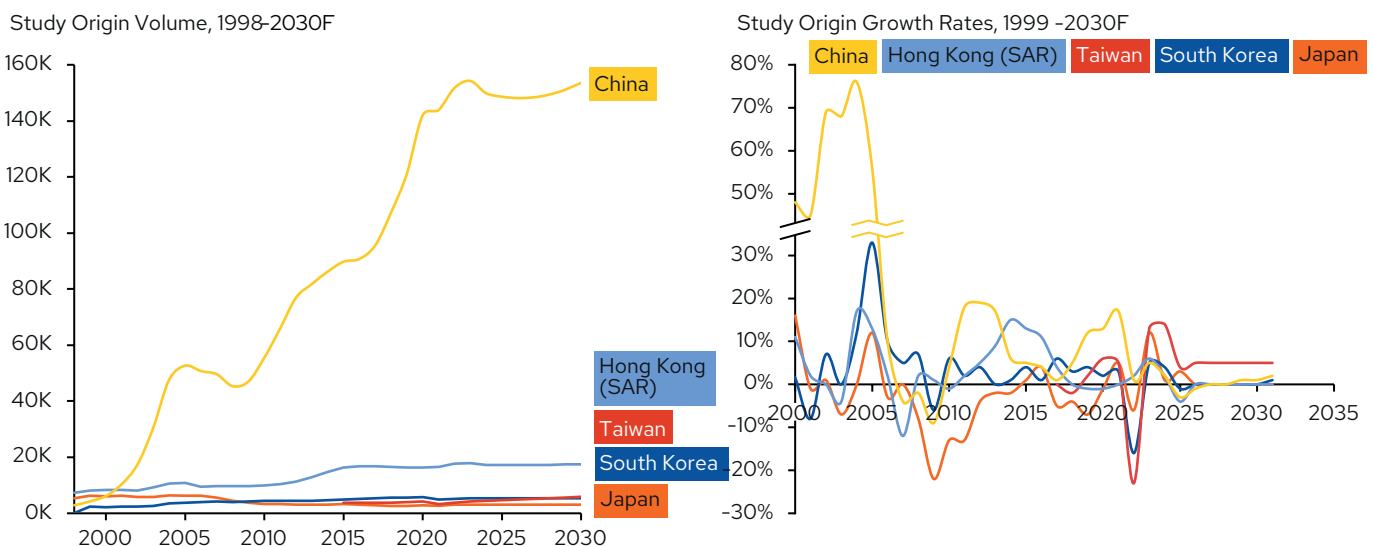
East Asia is losing steam as a source of students for the UK. China, by far the largest contributor, currently represents 20% of Britain's international student body. Unlike the US, Canada, and Australia – all of which saw Chinese enrolments decline in the past five years – the UK managed modest growth of just over 4%. But the outlook is muted; while the UK and Australia are likely to remain more popular with Chinese students than the US and Canada, numbers heading to Britain are expected to rise only marginally – by less than 1% annually compared to the 4% growth seen between 2017 and 2024.

The region's share of international students in the UK is projected to decline from 25% to 21% by 2030, with countries such as Hong Kong (SAR), and South Korea expected to post weak growth or even contractions. Visa data already reflects this shift: sponsored study visas for Chinese students fell 6% in 2024, and for Hong Kong nationals by 15%. Even in Q1 2025, while markets such as India showed a rebound, China reported a further 8% drop in visa applications.

These declines are not solely due to UK policy. Alternative destinations in Asia are becoming more attractive. Hong Kong (SAR) is actively positioning itself as a regional education hub and has increased its international undergraduate intake by 20% since 2019/20. This growing competition from within the region offers students more options and diminishes the UK's unique appeal. For Chinese students, who are growing more cost-conscious as the domestic economy faces headwinds, alternative destinations within East Asia are becoming more attractive. According to the QS International Student Survey, 59% of Chinese students cite cost of living as one of their principal concerns, making it inevitable that some students may consider alternative destinations. Countries such as Japan and South Korea offer high-quality education at lower overall costs, making them stronger competitors to traditional destinations like the UK.

As the shift continues, universities that count on high-fee East Asian students could feel the financial strain. The UK risks losing these students to rivals that offer both strong academic reputations and smoother pathways to work or residency.

Figure 7. UK student origin growth, 2000–2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Africa

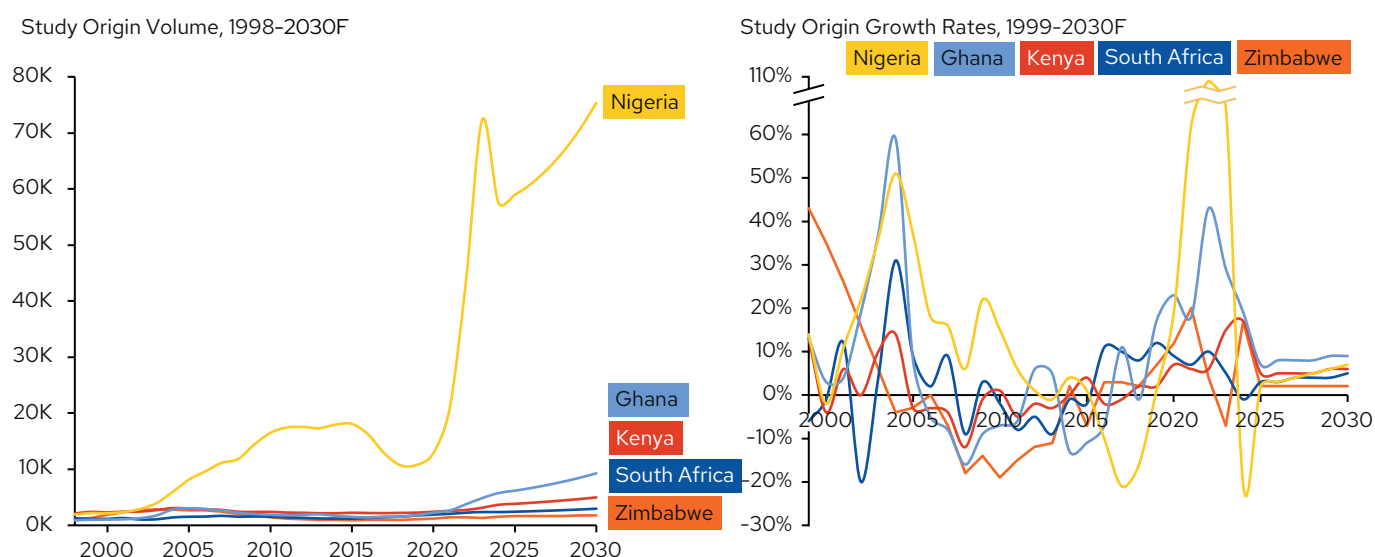
The UK remains a leading destination for African students, who accounted for over 10% of all international enrolments in 2024. While its appeal remains strong, growth from the region is expected to slow compared to the last five years, during which student numbers surged by more than 20%, driven largely by Nigeria, Ghana, and Kenya. Despite the expected slowdown over the next six years, Africa is still projected to be the UK's second-fastest-growing region after South Asia, with a projected annual growth rate of 4-5%.

Nigeria, Ghana, and Kenya together account for nearly 10% of the UK's international students. Since 2000, enrolments from these countries have shifted through distinct phases. Up to around 2009–2012, numbers grew steadily, followed by a decade of average annual declines leading up to COVID-19. From 2020 onwards, however, enrolments rebounded sharply. For Nigeria in particular, student numbers surged by more than 60% in 2023 before dropping by just over 20% in 2024. The decline reflects tighter UK immigration policies – most notably the recent ban on dependants for international students. This measure has hit markets such as Nigeria and parts of

South Asia hardest, given their higher ratios of dependants per student. Indeed, according to the QS International Student Survey, 28% of Nigerian students plan on bringing a partner with them during their studies, compared to only 9% overall.

Looking ahead, the Graduate Route visa remains a powerful draw, giving African students the chance to build careers in the UK after graduation. However, potential reductions to the visa's duration, tighter restrictions on dependants, and the rising cost of tuition and living could weaken the UK's edge. Competition from alternative destinations in Europe, Asia, and the Middle East also looms larger as they expand scholarships and migration pathways. Still, the UK's strong academic reputation, diverse scholarship opportunities, and vibrant African student community continue to make it an attractive choice. According to the QS International Student Survey, 60% of African students prioritise institutional reputation when choosing a university, making it essential for universities to preserve their reputation if they are to enrol students from this region.

Figure 8. UK student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

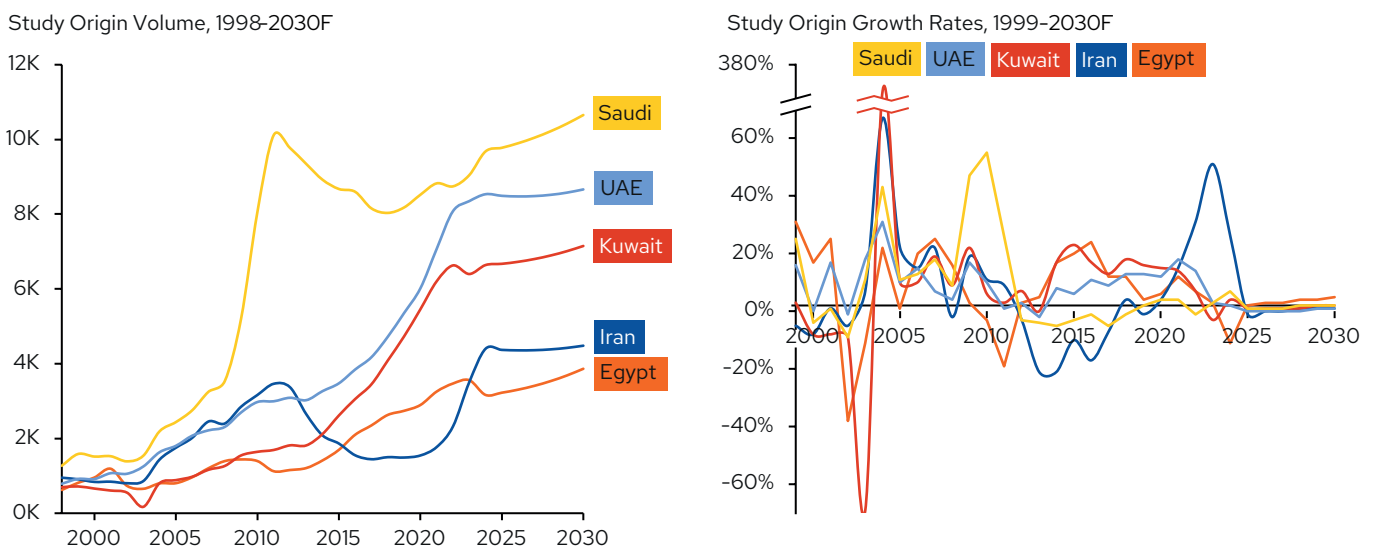
Middle East

Student mobility from the Middle East to the UK is projected to slow to about 1% in the next six years, compared to the nearly 5% average growth recorded between 2018 and 2024. This shift is being shaped by several intertwined factors, including evolving UK immigration policies and the push by Middle Eastern nations to become regional education hubs.

The slowdown is most visible in Saudi Arabia and the UAE, the region's two largest source markets. For Saudi Arabia, student numbers grew by just over 3% in the past five years but are projected to expand by less than 2% going forward. Early signs of this deceleration are evident, with study visa issuances to Saudi students falling 16% in 2024. In the UAE, enrolments are expected to remain broadly flat after nearly 10% growth between 2019 and 2024, most of which occurred in the earlier part of that period. Overall momentum has been constrained by new regulations requiring students to attend universities ranked within the global top 50 in their chosen field.

Governments in the MENA region are increasing investments in domestic universities and enforcing stricter regulations on state-sponsored students to encourage them to stay local, aiming to reduce reliance on foreign education and retain talent within the region. According to the QS International Student Survey, over a third of Middle Eastern students rely on government sponsorship to fund their studies, meaning stricter regulations will have an inevitable impact on flows from the region. The UK has long been a favoured destination for students from the MENA region, but recent immigration policy changes, including tighter migration controls, restrictions on dependants, and the potential changes to the Graduate Route visa, have impacted student mobility. Even so, the UK retains several advantages that sustain its appeal; a globally recognised higher education system, the continued draw of English-language instruction, and the strong prestige attached to UK degrees in MENA labour markets. For many students, particularly those self-funded, these factors ensure the UK remains a leading destination despite growing competition and policy uncertainty.

Figure 9. UK student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Latin America

Following a post-pandemic decline, student enrolments from Latin America in the UK are beginning to show signs of growth. While the UK remains a popular study destination, known for its strong academic reputation and highly ranked universities, overall growth is expected to be modest. Projections indicate that Mexico and Brazil will grow by over 2% compared to annual declines of more than 3% over the last five-year. Overall, student enrolments from the region are projected to grow by 2% between now and 2030.

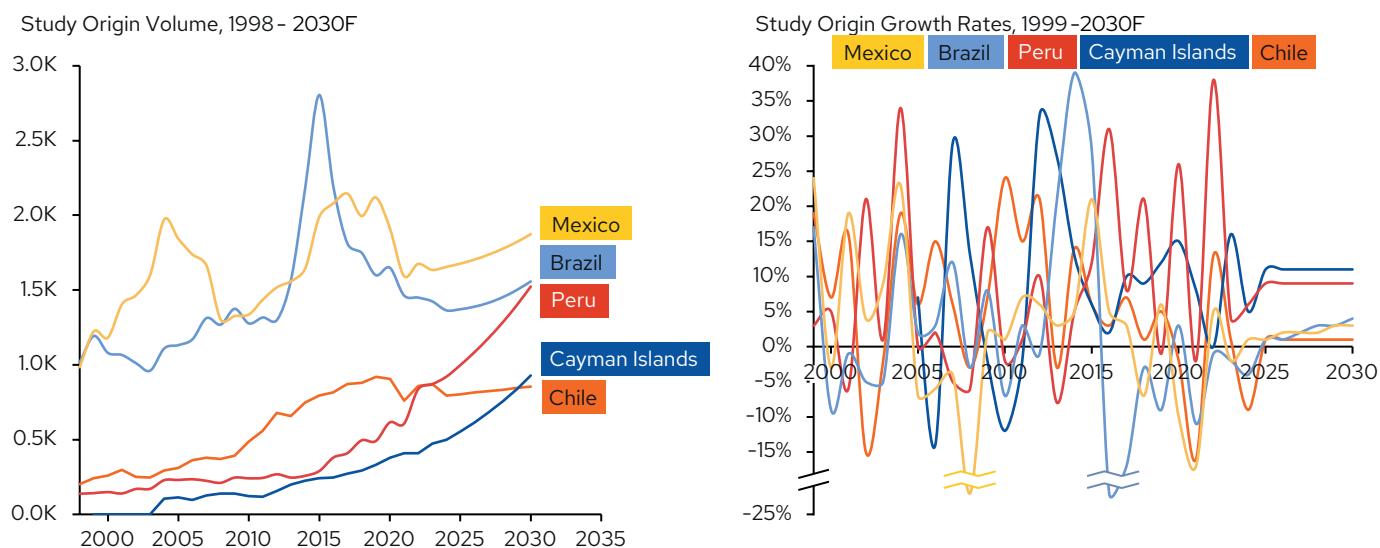
Student mobility from Latin America to the UK continues to be influenced by the tightening of UK visa policies, particularly the restrictions imposed in early 2024 on bringing dependants through the student visa route, and the rising costs of living and visa fees have made the UK an increasingly expensive destination. Given that according to the QS International Student Survey, 82% of students from this region are concerned about the cost of living, it's clear that value for money is impacting their decision-making. These UK policy shifts, combined with economic challenges in Latin America and

global competition from alternative destinations like Australia and New Zealand, which offer more flexible visa systems, are influencing student decisions.

The UK's Graduate Route allows international students with a bachelor's degree or higher to stay and work in the UK for up to two years after graduation – or three years for PhD graduates. This flexibility, however, may soon be curtailed; the government's May 2025 Immigration White Paper proposes reducing the post-study work period to 18 months. Alongside this, the availability of national and institutional scholarships, such as COLFUTURO and CONAHCyT, continues to ease financial barriers for Latin American students pursuing postgraduate studies in the UK.

Overall, while the UK is currently experiencing a slow growth in the number of Latin American student enrolments, wider scholarship opportunities, government support, and enhanced post-work opportunities suggest potential recovery and sustained engagement with the Latin American region.

Figure 10. UK student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Southeast Asia

Student inflows from Southeast Asia to the UK are projected to rise by about 2% between 2024 and 2030, following a largely stagnant period from 2018 to 2024, when numbers fell in the early years before rebounding in 2023 and 2024. Among key source markets, enrolments from Malaysia are expected to decline, while Singapore is likely to remain stable. Thailand, however, is set for a turnaround, with enrolments forecast to grow – reversing the 0.7% drop recorded between 2019 and 2024. Indonesia is also an exception to this trend, with its enrolments expected to grow between now and 2030 – similar to the 8.5% increase seen between 2019 and 2024.

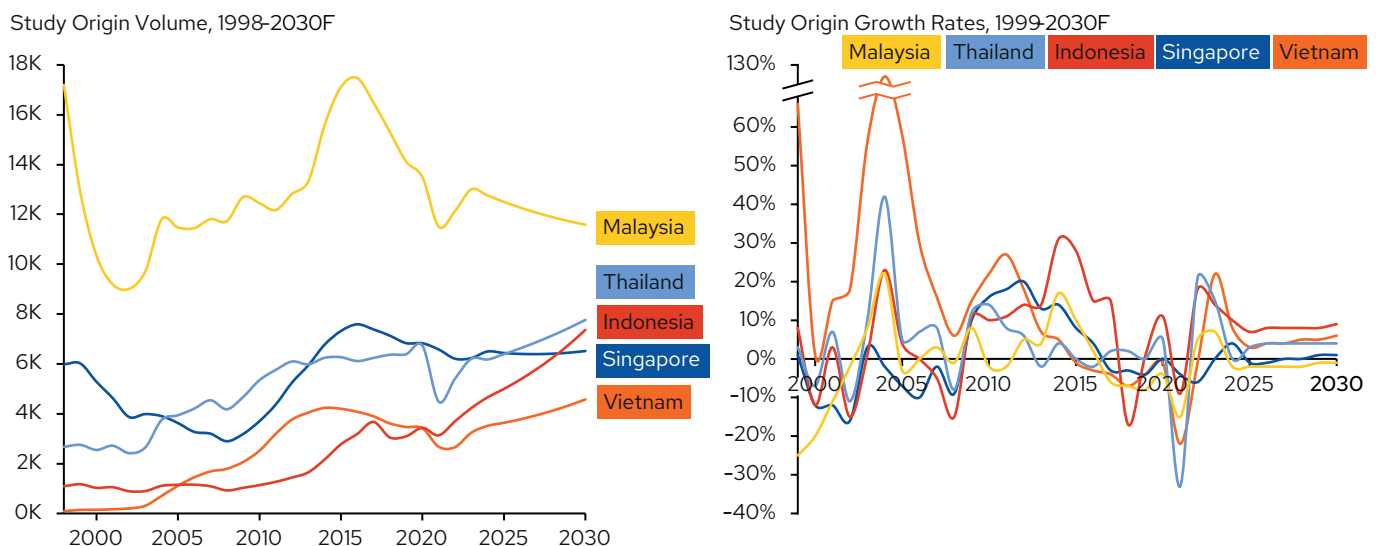
Students from Southeast Asian countries accounted for 5% of the total international student body in the UK in 2024, with Malaysia, Singapore, Thailand, and Indonesia emerging as key markets. Despite their contributions, the UK's attractiveness as a study destination is being impacted by several factors. Rising tuition fees and living costs, increased visa and healthcare surcharges, and recent policy changes that restrict the number of dependants have all contributed to a decline in student numbers. 72% of students from this region are

concerned about the cost of living, meaning the UK's declining affordability is significantly impacting its viability as a study destination. For instance, Malaysia and Thailand saw their student numbers drop by 1.9% and 0.4% in 2024.

UK institutions are increasing their collaborations with Southeast Asian governments through transnational education programmes and by establishing branch campuses in countries like Malaysia and Singapore. These initiatives reflect a strategic shift toward making a quality UK education more accessible within Southeast Asia. To further support students, a range of scholarships, including Chevening ASEAN, Commonwealth, and ASEAN-UK SAGE, are also available and are fully funded by the UK government to help them with their postgraduate studies.

However, the UK faces growing competition as several Southeast Asian countries, particularly Malaysia, Singapore, and Thailand, position themselves as regional education hubs. With investments in local universities, cross-border programmes, and efforts to attract students from within and beyond the region, Southeast Asia's rising role could counterbalance some of the UK's pull, especially for cost-conscious students.

Figure 11. UK student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Europe

The UK's appeal to European students has sharply declined since Brexit, with overall enrolment rates from the region declining by more than 8% annually, on average between 2018 and 2024. While the UK once attracted large cohorts from across the continent, demand has weakened due to the removal of tuition fee parity and loss of access to student loans, and the country's exit from the Erasmus+ programme in 2021. Student enrolments from the region are expected to grow modestly in the period, at around 2.5% through 2030.

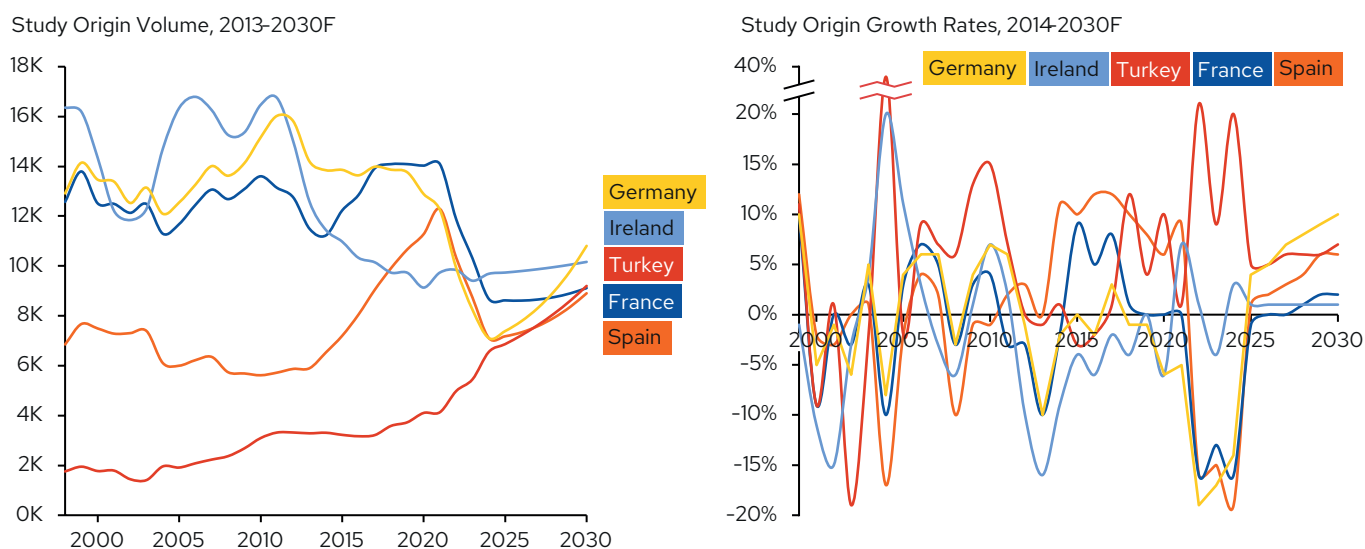
Before Brexit, students from across Europe accounted for nearly a third of new international enrolments into UK universities. By 2024, this share had fallen to 13%, representing a structural shift in mobility patterns. STEM and postgraduate pipelines, which Europe once heavily contributed towards, have seen a sharp decline. For many mid-tier UK universities, the fall has compounded financial strain, especially as overall international student numbers dipped by close to 4% in 2023/24. Yet, despite reduced inflows, European students are reported to have contributed more than £4.3 billion to the UK

economy in 2021/22, underscoring the potential magnitude of further losses if current trends persist.

European students now face annual fees often exceeding £22,000, in addition to new visa requirements and higher living costs. While the Graduate Route offers two years of post-study work, ongoing immigration reviews and tighter policy signals have undermined its certainty. At the same time, European universities have strengthened their position by expanding affordable, high-quality, English-taught programmes, intensifying regional competition, and making it easier for students to remain within the EU's mobility frameworks.

The UK's ability to compete in the European student market will depend on its capacity to address affordability, enhance clarity around post-study opportunities, and restore trust. Without reforms like tuition adjustments, new bilateral mobility schemes, or stronger integration of youth exchange programmes, the UK risks ceding further ground to continental destinations that offer lower costs, academic quality, and cultural proximity.

Figure 12. UK student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

US and Canada

Student enrolments from North America are expected to grow by roughly 3% annually to 2030, matching the pace of the last six years. While the US and Canada represent a smaller proportion of the UK's international student body, their growth is influenced by a combination of economic factors and a growing interest in international experiences.

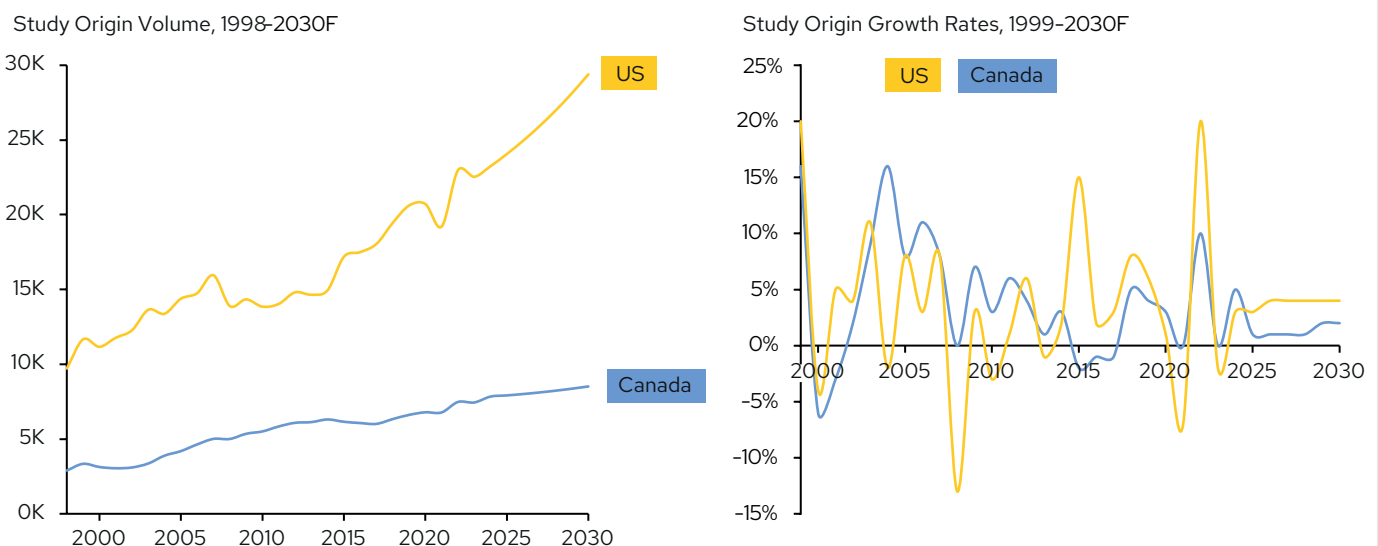
Historically, North American student mobility to the UK has been limited, overshadowed by stronger growth from Asian and European countries. In 2024, around 23,000 US students were enrolled in the UK; however, their share of the international student population has been slowly declining, with the US falling from the 3rd to the 5th largest source country between 2019 and 2024. Canadian students represent a much smaller cohort, making up only about 1% of the total international student body.

One of the UK's value propositions for North American students is affordability. The high cost of higher education at home, especially at private US universities and increasingly at Canadian institutions, has prompted students to

look for more affordable, high-quality alternatives. The UK's shorter degree durations, three-year bachelor's and one-year master's programmes, offer substantial savings in both tuition and living expenses compared to the longer models in North America. For US students, the draw also includes access to a global academic environment, globally recognised degrees, and opportunities to network in Europe. Indeed, more than three-quarters of students from this region prioritise institutional reputation, making the UK's strong academic reputation a significant draw to this audience. The Graduate Route visa, which allows students to stay and work in the UK for up to two years post-graduation, further enhances the UK's competitiveness against domestic options.

Sustaining growth will require more targeted strategies. The UK's traditional reliance on larger markets has meant that recruitment efforts in North America have been less focused. Given changing student preferences, UK institutions have an opportunity to showcase the benefits of a UK education, such as competitive costs, strong academics, and post-study work options.

Figure 13. UK student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, September 2025

Drivers for growth

Growth looks promising for the UK through to 2030, but how can universities recruit even more effectively?

- Focusing on labour market dynamics
- Build (or re-build) reputation

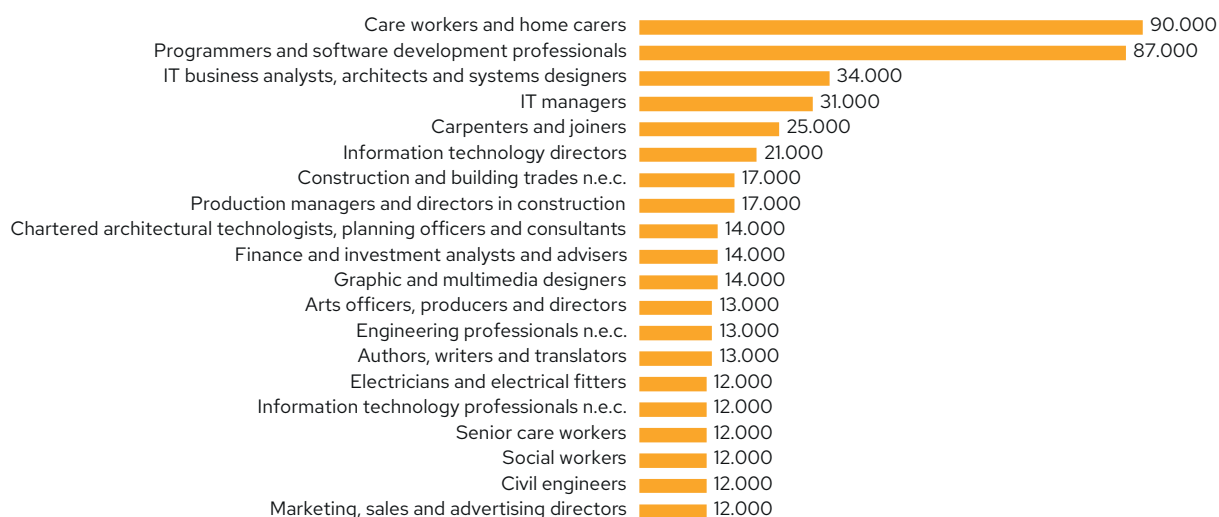
Labour market dynamics

Universities as engines of economic growth

In the next five years there is a widespread expectation that demand for jobs in priority occupations will expand significantly in the UK (Figure 14). Combined with the need amongst employers for more effective development of employable and transferable skills for those entering the workforce, this forecast provides a significant challenge for those responsible for the skills development of the UK's future labour force. Higher education institutions have a critical role to play in resolving this issue, however both universities and employers alike will need support to harness the potential of domestic and international student flows to close these skills gaps and support the country's long-term prosperity.

Assessing where these skills shortages may have the most impact is crucial. Initial modelling from Skills England suggests that employment demand in priority occupations is expected to increase by 0.9 million between now and 2030, with occupations in Digital, Adult Social Care, Construction and Engineering all facing significant additional demand. They go on to estimate that two thirds of these will require post-secondary qualifications, with care workers, software developers, business analysts and IT managers all seeing significant volume growth in the next five years. Equipping graduates with the skills needed by employers should be a priority for universities and it is vital that curricula development pivots to meet future demand.

Figure 14. Additional employment between 2025 and 2030 across all sectors – Top 20 occupations



Source: Skills England planning scenarios based on sector-level projections

Failing to address these labour market shifts poses a significant risk to the UK's future economic potential. As the QS World Future Index indicates, the UK trails several of its supposed competitors in assessments of its economic transformation including the US, South Korea, Japan, Germany, Switzerland and Denmark (Figure 15). At a macro level, the UK's stagnating workforce productivity, declining real public and private investment, low-to-no growth over the past decade and a predicted young-age workforce population decline from 2030 have all contributed to this scenario. Skills shortages, along with low R&D innovation are likely to reinforce this economic stagnation unless significant action is taken.

International students have a potentially critical role to play in filling short-term, high impact skills gaps within the UK economy, making it vital to leverage the strengths of the higher education system to continue to attract this international talent. The Graduate Route visa provides a critical avenue for employers to access and benefit from this talent and to harness their potential from shifting patterns of global student flows. However, this can only continue if education and industry have the support they need to innovate and co-develop new courses that focus on those future-facing skills. By aligning curricula with industry needs, UK higher education can become an engine that creates skills-ready entrepreneurs who go on to create new jobs and drive economic growth.

**Figure 15. Economic Transformation indicator
Top 25 locations (normalised score out of 100)**



Source: QS World Future Skills Index 2025

Embedding employability into their educational offerings and ensuring graduate outcomes form a central pillar of their recruitment strategies is how UK universities can respond to the shifting economic landscape. As the QS International Student Survey notes, information on work placements and links to industry is one of the most preferred marketing communication topics for students when applying to university, reiterating a pre-existing demand from students for a focus on employability. Furthermore, two regions which will be critical in dictating future student flows to the UK are East and South Asia, both of which show a significant focus on graduate outcomes and industry ties reiterating the need for universities to pivot their student recruitment strategies.

The UK has long been recognised for its innovation and leadership in global business, however economic stagnation poses a risk to its position in the global economy. Whilst the demand for cutting-edge skills is evident in the UK, it is vital that curricula development pivots to address upcoming skills shortages and that universities emphasise their focus on graduate employability to continue to attract international students who can help address high-impact, in-demand skills gaps.

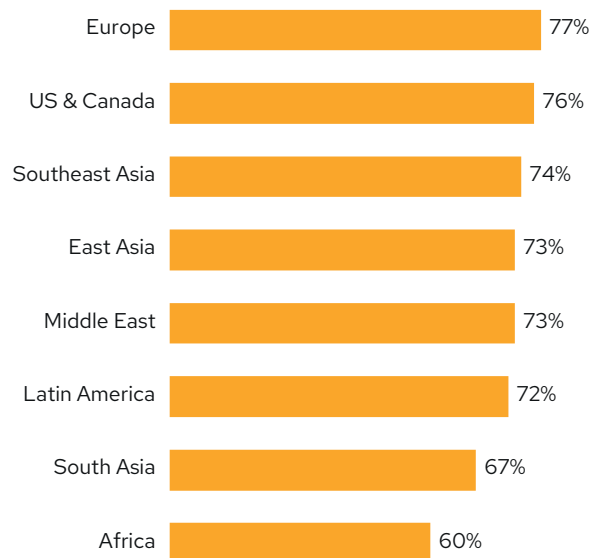
International student trends

Using insights into what students
want to future-proof your strategy

The growing influence of reputation on student choices

The reputation of an institution is of increasing importance to students looking to study in the UK. In all regions except South Asia and Africa, over 70% of students say reputation is important when choosing a university (Figure 16).

Figure 16. Importance of reputation to students when choosing a university



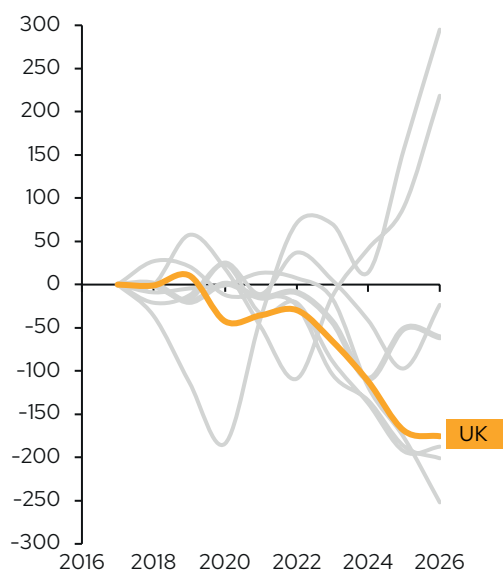
Source: QS Global Student Flows, September 2025

Similar to major markets across Europe, this rising importance is arriving at a bad time for UK institutions. The median Employer Reputation rank of UK institutions is down by over 150 positions since 2017 (Figure 17). Academic Reputation performance is also down, but only slightly (Figure 18). In both Figure 17 and 18, we see some countries

that have rapidly improved their reputation – these countries may threaten the hegemony of the ‘big four’ as they provide high-quality education at a lower cost than the Anglophone destinations.

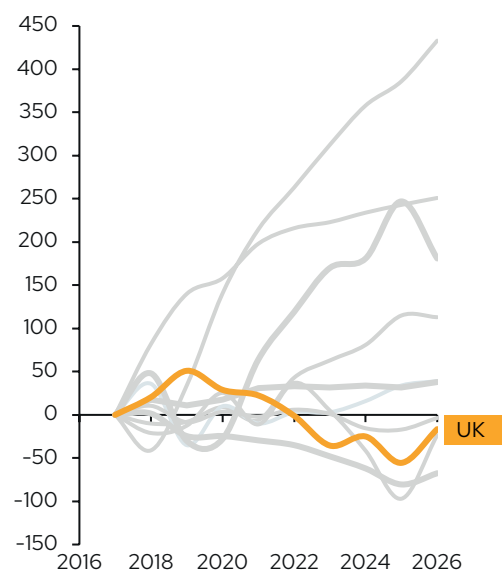
Combined, these factors present an unfortunate situation for UK institutions.

Figure 17. Change in Median Employer Reputation Rank since 2017



Source: QS World University Rankings

Figure 18. Change in Median Academic Reputation Rank since 2017

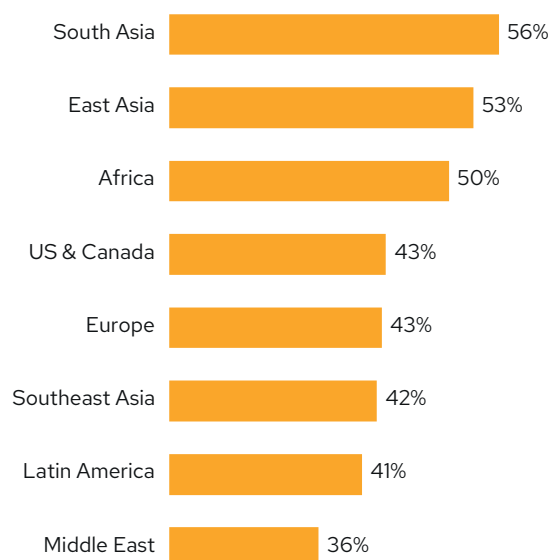


Source: QS World University Rankings

Employability on students' minds

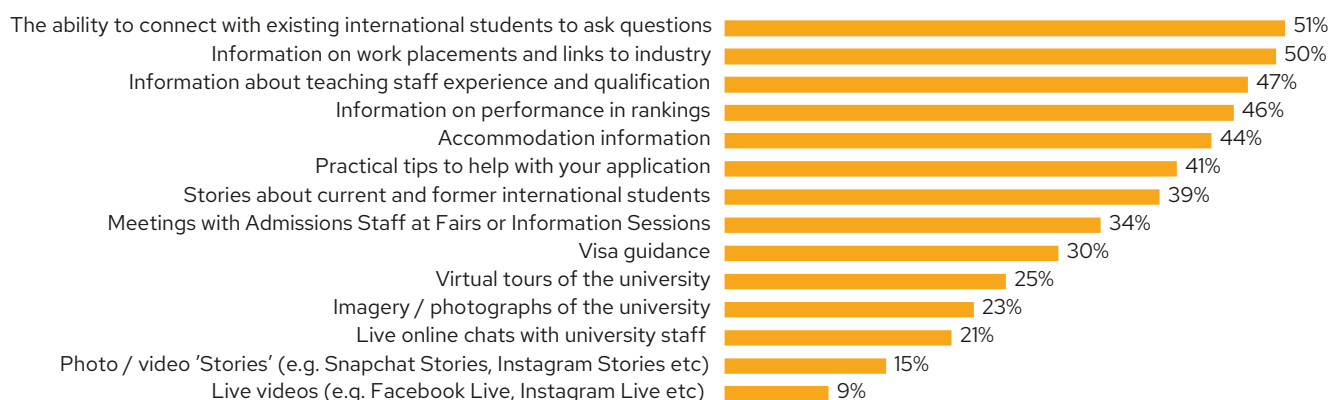
The issue of UK institutions' Employer Reputation rank declining is further exacerbated by students' increasing focus on post-study employment outcomes when making study decisions. 50% of students looking to study in the UK said information about work placements and links to industry was useful – the second highest answer (Figure 19). Students from South Asia, East Asia and Africa are the most likely to say that this information is useful (Figure 20).

Figure 20. Marketing communication preferences
% of students selecting 'Information on work placements and links to industry'



Source: QS Global Student Flows, September 2025

Figure 19. Preferred marketing communication topics
Which of the following are most useful to you when making decisions about your studies?

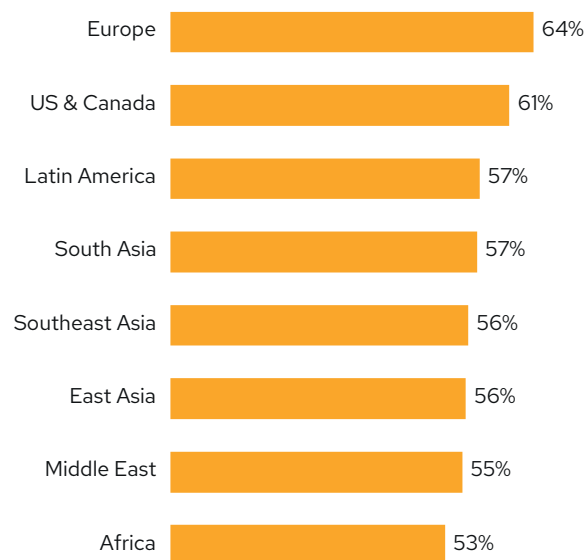


Source: QS Global Student Flows, September 2025

Regardless of source region, over 50% of UK-bound students said that they chose a course because it allows them to learn new skills for their career (Figure 21).

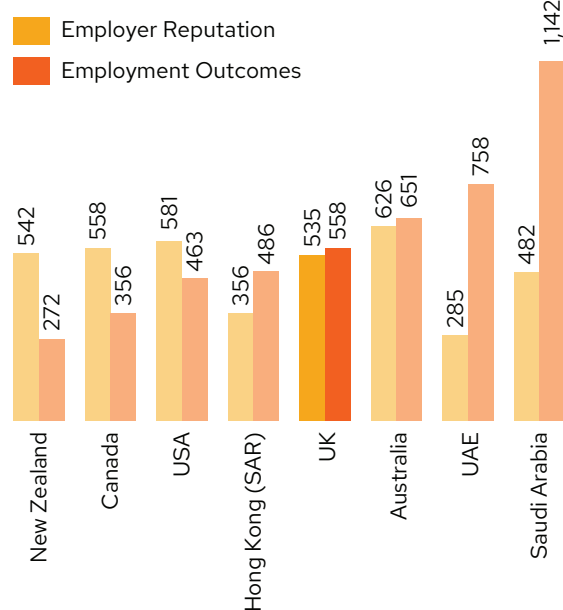
An institution's Employer Reputation can be significantly influenced by the outcomes of its graduates (Figure 22). In the UK, institutions' Employment Outcomes are marginally worse than their Employer Reputation. This disparity suggests that while UK graduates are getting hired, their employers are not entirely satisfied with graduates' skillsets. To create parity, UK institutions need to make graduate skills development a core component of existing and upcoming curricula creation. Ensuring that graduates have the appropriate mix of skills to meet the existing and future demands of local employers should be central to this strategy. In doing so, institutions can transform their capacity to become drivers of economic growth and enhance their reputation among employers.

Figure 21. Career considerations when choosing a course
% of students selecting 'It allows me to learn new skills'



Source: QS Global Student Flows, September 2025

Figure 22. Average Employer Reputation rank vs average Employment Outcomes rank



Source: QS World University Rankings 2026

Strategic imperatives for 2030

This report urges higher education leaders to prepare for the future by fully analysing factors that are likely to influence global student flows. At an unpredictable time, universities need to plan for a range of scenarios in order to be agile and adaptable.

Equip graduates with the skills employers need

In the face of misalignment between industry and academia, tying up with priority occupations outlined recently by the government – where occupations are expected to rise by 0.9 million by 2030 – will be key. Universities need to consider how they can best prioritise skills in areas such as Digital, Adult Social Care, Construction and Engineering, among others. Compared with global peers, UK institutions are falling behind on their ability to ensure excellent graduate outcomes. Lifelong learning is another opportunity for higher education while industry and the economy shift as AI develops.

Manage declining reputation, especially around employability

Employer and academic reputation are not only vital in our Talent Race Rebound scenario, but also in a more restrictive environment outlined in Regulated Regionalism or the innovative Hybrid Multiversity. Employers will recruit graduates from institutions they trust to deliver the necessary skills in Industry 4.0 and beyond. QS analysis shows 70% of UK-bound students consider reputation an important factor when choosing where to study. Maintaining the reputation in the QS employer surveys that UK institutions have worked so hard to achieve is paramount in all future scenarios.

Mitigate increasing costs through TNE, targeted student recruitment & new sources of funding

The growth that QS has predicted in this report (that UK international student numbers are projected to grow 3.5% annually to 2030) will not be enough to fully support universities through a challenging financial period. New models of learning, whether that be through innovative digital delivery or transnational education, as well as income through new sources of funding (such as spinouts), should be considered as part of holistic, future strategies. New forms of income will be even more important if our Regulated Regionalism scenario pans out.

Methodology

Global Student Flows

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

Open source framework

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

The qualitative research process is informed by extensive interviews with global experts, including economists, policy leaders, and institutional decision-makers. These contributors provide deep contextual insight

into specific country-to-country flows, policy settings, and sectoral trends. Quantitative analysis is anchored in both historical datasets and current indicators, supported by HolonIQ by QS' proprietary global flows model. This model employs advanced analytics to simulate multi-factor, high-dimensional data across more than 4,000 unique international student flows.

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

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

Push factors: Drivers of outbound mobility from source countries

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

Demographics

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

Economic conditions

The economic context of the source country directly impacts the capacity of individuals to finance international study. A slow economy, low gross domestic product (GDP) per capita,

poor income distribution and overall household wealth can all motivate students to seek more prosperous environments abroad.

Loans & scholarships

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

Domestic alternatives

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

Risk factors

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

Pull factors: Determinants of destination market attractiveness

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

Academic quality

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

Post-graduation prospects

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

Affordability (inc. FX)

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

Recruitment infrastructure

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

Safety and security

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

Disruption factors: Drivers of volatility and alternative mobility scenarios

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

Geopolitical factors

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

Place-based risks

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

Capacity constraints

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

Hybrid programmes

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

Online learning

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

Mapping flows

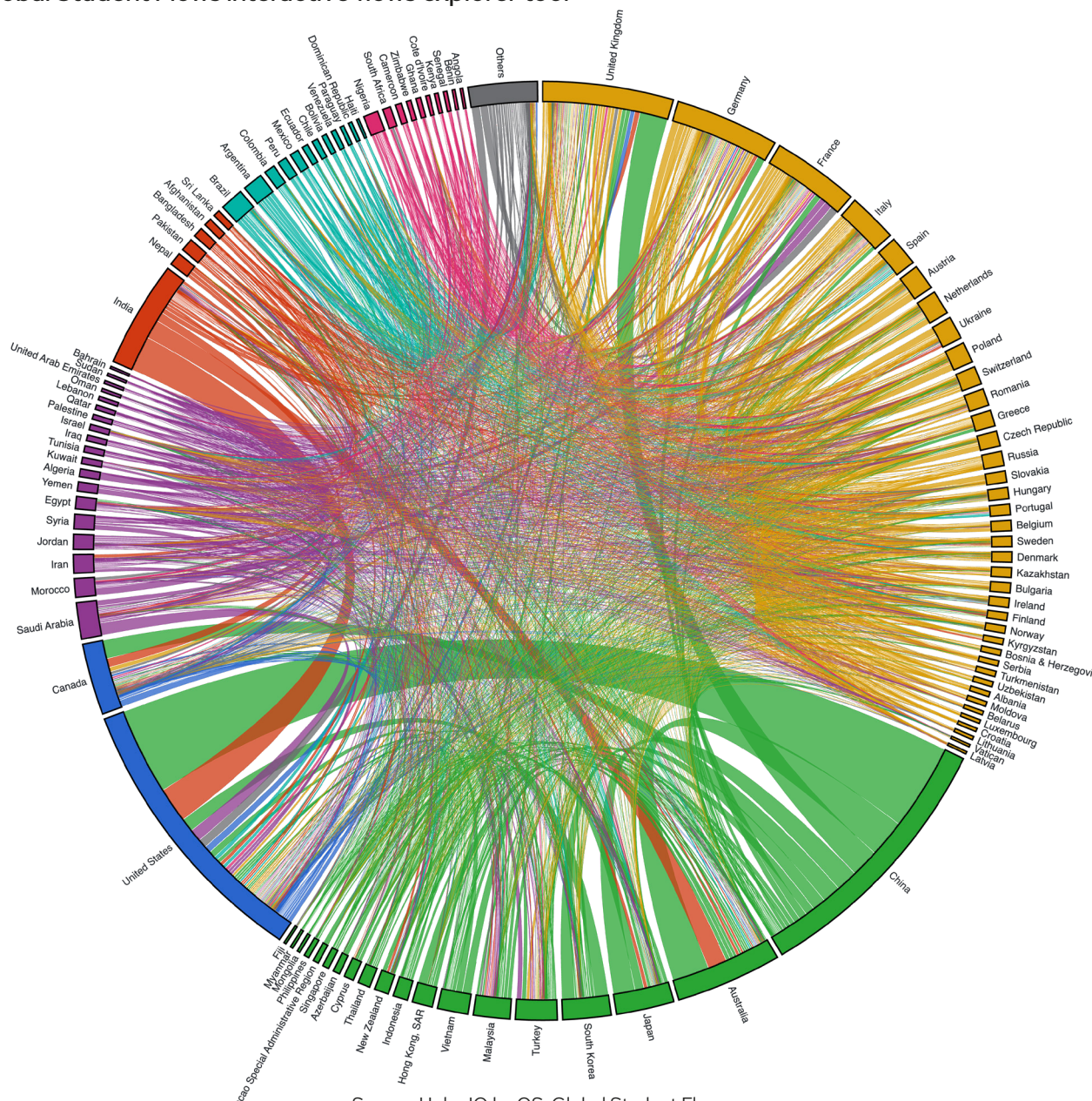
HolonIQ by QS has developed proprietary technology to map and analyse the complexity of global student mobility and cross-border flows. Each year, over seven million students travel from more than 150 source countries to study in over 100 destination countries, representing more than 4,000 unique country-to-country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

The platform enables users to analyse over 4,000 discrete flows over time, identifying trends and patterns that inform strategic

planning, policy development, and investment decisions. The platform is designed to simplify the management, evaluation, and forecasting of international mobility and related datasets.

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

Global Student Flows interactive flows explorer tool



Source: HolonIQ by QS, Global Student Flows

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

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

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

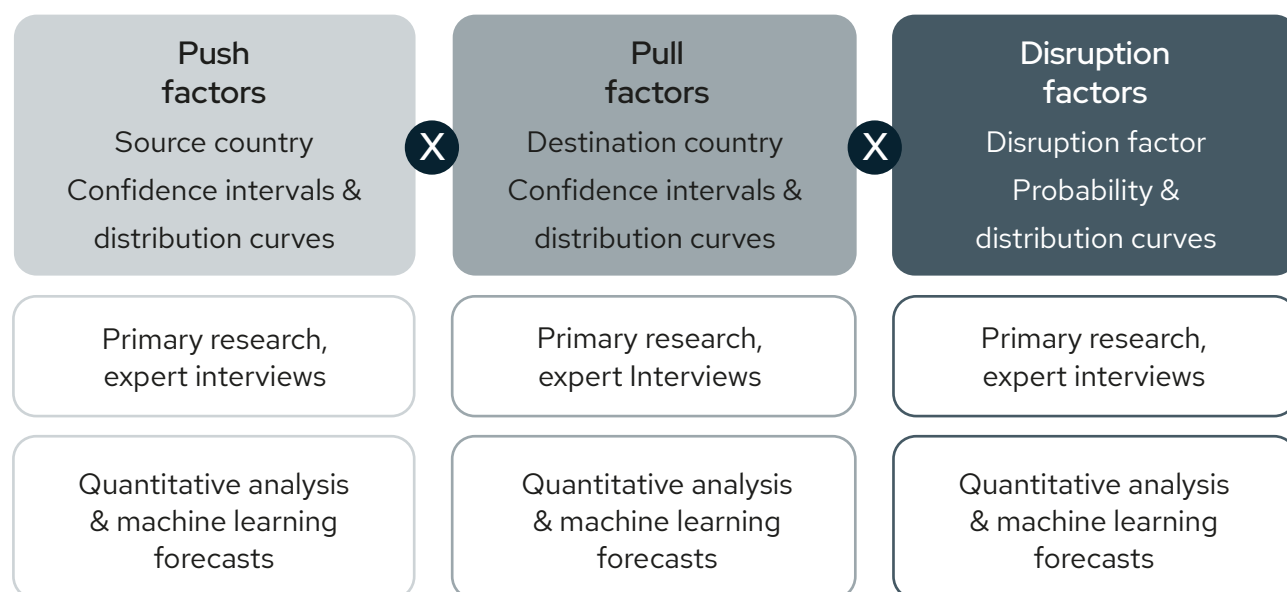
Each factor is associated with a statistical distribution and confidence interval derived from a combination of primary expert interviews and historical quantitative data. Push and pull factors each generate growth rate distributions for every source and destination country respectively, while disruption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

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

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

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

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-enrolment journey. We want to know what students prioritise when choosing a location, university and course, and we want to understand what they perceive as high-quality teaching. We ask students how their family influence decision making, and we gather data on the social media and digital channels they use to find study information.

The International Student Survey also benefits from its longevity – 2025 is our 13th edition. The consistency in our questioning allows us to see how students' answers change over time, and predict future trends and shifts. Its yearly format allows us to add new questions to get a snapshot of student perception. Over the past three years, we've gathered crucial data on transnational education, sustainability and Generative AI.

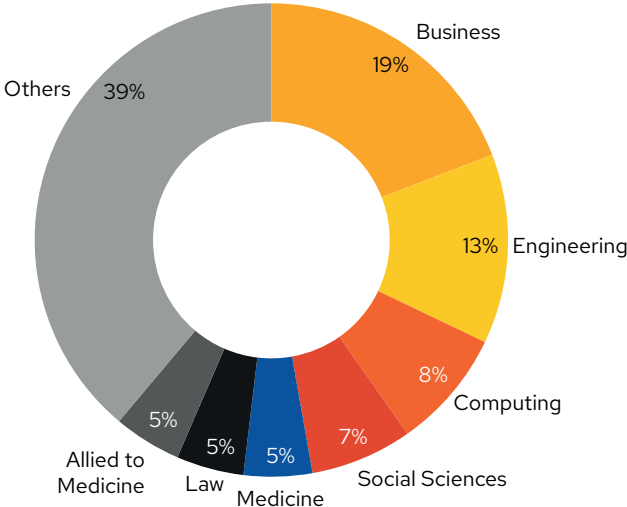
The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 146 universities globally, who were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

Fieldwork for the Survey was conducted between 6 January and April 7 2025, via Qualtrics, an online survey management platform. The Survey contains 50 unique questions, covering a range of topics relating to prospective student decision-making, from their study background to their priorities, marketing communication preferences, through to their principal information sources, career aspirations, and post-study plans.

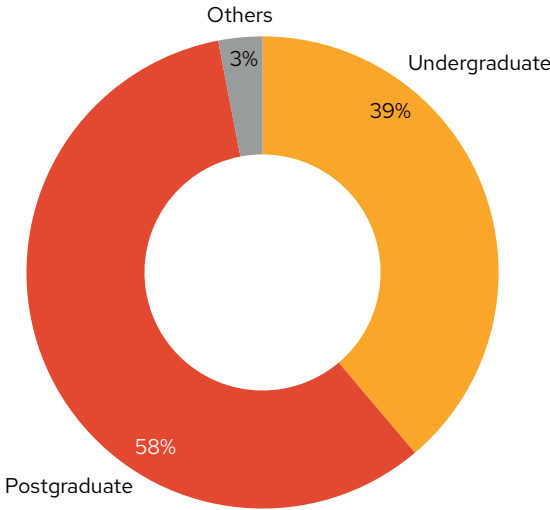
The 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution that took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey
respondent demographics

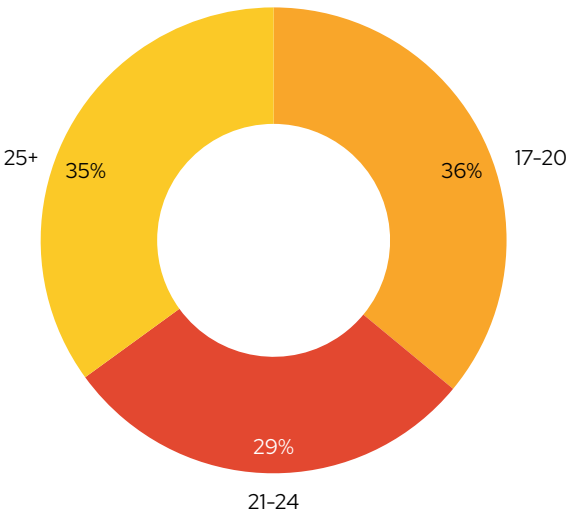
Subject preference



Study level



Age



Source: QS Global Student Flows, September 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 specialised education bodies, the model integrates both inbound and outbound mobility data across all major world regions. These sources reflect the latest available figures on enrolments, visas, migration, scholarships, and institutional capacity, and are harmonised to support robust forecasting and scenario analysis.

Key sources include:

UNESCO Institute for Statistics, 2023

World Bank Education Statistics, 2021

OECD, 2022

Eurostat, 2023

IOM Migration Data Portal, 2022

IIE Project Atlas, 2024

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

Australian Government, Department of Education, 2023

Belgium Federal Public Service for Education, 2023

Campus France, 2023/24

Council of Higher Education (YÖK), 2022

Department of Higher Education and Training, South Africa, 2022

Department of Home Affairs – Australia Student Visa Data, 2024

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

Education Malaysia Global Services, 2024

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

ETH Zurich, 2023

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

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

General Statistics Office of Vietnam (GSO), 2023

Government of Canada, 2023

Higher Education Commission (HEC), Pakistan, 2023

Higher Education Statistics Agency (HESA), 2022/23

Hungarian Central Statistical Office (KSH), 2022

Immigration, Refugees & Citizenship Canada (IRCC), 2023

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

Japan Student Services Organization (JASSO), 2024

Ministry of Education, Argentina, 2023

Ministry of Education, Brazil, 2022

Ministry of Education, China, 2021

Ministry of Education, Columbia, 2023

Ministry of Education, Ghana, 2021

Ministry of Education, Singapore, 2023

Ministry of Education, South Korea, 2024

Ministry of Education, UAE, 2021

Ministry of Education & Science, Czech Republic, 2022

Ministry of Education and Science, Poland, 2023

Ministry of Education and Science, Uzbekistan, 2023

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

Ministry of Higher Education, Morocco, 2021

Ministry of Higher Education, Saudi Arabia, 2022

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

Ministry of Higher Education, Tunisia, 2021

Ministry of Science & Higher Education, Russia, 2022

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

Ministry of Universities, Spain, 2022/23

National Universities Commission, Nigeria, 2020

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

Nuffic, 2023/24

Philippines Commission on Higher Education (CHED), 2023

Portugal Directorate - General for Education and Science Statistics, 2023

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

Statistics Canada, 2022/2023

Statistics Finland (Tilastokeskus), 2023

Statistics Norway (SSB), 2023

Statistics Sweden (SCB), 2023

Statistisches Bundesamt (Destatis), 2024/25

Student and Exchange Visitor Information System (SEVIS), 2023

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

Swedish Higher Education Authority (UKÄ), 2022

Ukraine State Center for International Education, 2023

University Grants Commission, Bangladesh, 2023

Wissenschaft weltoffen, 2023/24

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