China

Global Student Flows
October 2025

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Foreword

Jeroen Prinsen
Executive Director
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I am pleased to present the Global Student Flows: China 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 International Student Survey and institutional performance data – with student mobility flow analysis. This approach provides a richer, more comprehensive view of China's international education landscape.

In recent years, China has developed as an attractive study destination, increasingly building international partnerships, utilising generous stipends to bring international students to campus and funding research effectively to develop world-leading capabilities in science and technology. Even before the outbreak of the COVID-19 global pandemic, China was gradually shifting its attitude to the global higher education ecosystem from a source country for international students to an equitable partner in exchange, research and teaching.

While traditional study destinations such as the UK, Australia, Canada and the US have toughened compliance, announced international student caps or tightened visa processing for students, China has continued to collaborate with countries across Africa, Southeast Asia and beyond. This renewed global outlook has come as research in China has developed with massive investment and an ability to develop its own talent and attract leading researchers and scientists from across the globe. While universities in other countries are grappling with financial instabilities, China's higher education sector appears to be going from strength to strength.

This report takes a wide-angle view of China'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 analyse inbound and outbound mobility patterns for China and forecast student numbers through 2030. Combined with fresh insights from the QS International Student Survey, this analysis generates practical recommendations to help universities refine recruitment, engagement, and retention strategies. At QS, we are steadfastly committed to supporting China's higher education sector further.

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 China's universities understand their role in a time of heightened potential – 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
- Connect universities with the right students through our platforms, data, and targeted engagement
- Support innovation, new models, and market expansion for long-term institutional growth
- Provide sector-leading analytics and insights to enable global benchmarking and performance improvement
- Map in-demand skills needs to teaching, research, and employability for future workforce readiness

Get in touch to find out more

Report findings

Executive summary

China's future growth projected to be slower than peers

International enrolments in China are projected to grow by 2.5% between now and 2030. This is compared with the 5% projection for Europe and the 3.5% for the UK. Countries such as New Zealand, Malaysia, South Korea and Vietnam are projected to grow by 7-9%. However, China is set to outpace the 2% growth projection in Australia and the 1% in Canada. While the government's approach to education diplomacy has encouraged prospective students to consider studying in China, campuses across the country are not necessarily adapted to fully manage these linguistically and culturally diverse intakes.

Reputation improvement challenge

Chinese institutions face a challenge to catch up with the reputation of international peers. Prospective students continue to hold the reputation of institutions in high regard, and other countries, such as Malaysia, have rapidly improved their reputation performance. At a time of low growth, Chinese institutions need to build their reputational among key stakeholder groups, or students may look to study in other countries. Understanding target markets is crucial for Chinese institutions looking to increase enrolments. QS International Student Survey data shows certain student groups are using reputation more and more when making study decisions.

Employability is a key focus for students

For students looking to study in China, employment, skills development and return on investment are key priorities. Universities need to prioritise equipping graduates with digitally oriented, high-value skills that will continue to be required by employers, while also embedding entrepreneurship skills into curricula that will put students in good stead for the future. Closer collaboration with industry and business will also ensure that universities contribute not only skills, talent and knowledge but also help to expand the country's economy.

Scenario planning is more important than ever

Amid uncertain policy environments, it's critical that institutions do not commit to a single plan. 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. Universities need to be prepared to shift quickly in the face of geopolitical, economic or workplace changes.

Strategic challenges

1. Integration of international students

While both English medium programmes and Chinese preparatory classes have grown in recent years, international students need more support to integrate into campus life as well as wider society. This will benefit both student outcomes, and closer connections with communities beyond campuses could further foster future economic, social and cultural ties. Better integration will also improve student satisfaction.

2. Growing international student numbers

With high-growth regions such as South Asia, East Asia and Africa, no one nationality is over-represented among China's international cohorts – an aim many institutions globally are attempting to replicate. However, there is still a long way to go to reach a satisfactory level of international students on campus, especially those beyond China's biggest cities. Maintaining quality amid expansion will be a challenge, as will ensuring provincial universities are equipped to share the load. That said, China has built strong links in Africa, giving it a head start over many other countries vying to increase future student numbers from the continent.

3. Labour market alignment

Higher education systems across the globe are considering how best to produce graduates with the right skills for the future of work. In China, universities need support and close collaboration with industry and business in order to realise their role in reducing skills shortages. For institutions in China to gain market share from established international student destinations, employability and graduate skill sets will have to be as much of a priority for institutions as they are for students.

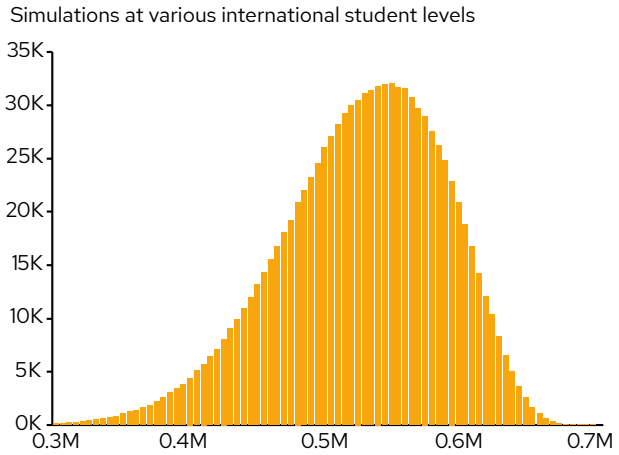
2030 outlook

In brief

China is projected to return to the international student number peak it saw before COVID-19 in 2026.

Connections the country has made through the Belt and Road Initiative will see China's international student numbers reach around 550,000 by the end of the decade.

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



Source: QS Global Student Flows, October 2025

China's position as a global study destination is set to strengthen at a measured pace in the second half of the decade, with international enrolments projected to grow by 2.5%. The growth between now and 2030 is primarily led by rising interest from neighbouring Asia and Belt and Road partner countries. The gradual momentum reflects Beijing's recalibrated education diplomacy – anchored in affordability, scholarship reach, and expanding transnational education (TNE) – while structural constraints such as English-teaching capacity and institutional readiness temper the pace of growth. For China's leading universities, the important question is whether campuses can adapt in time, to manage more linguistically and culturally diverse intakes.

Since the pandemic, China's foreign student growth has slowed. The international student population, which peaked at about 490,000 before COVID-19, had yet to return to that level by 2024, with our forecasts projecting a full recovery only by 2026. By 2030, international enrolments are projected to reach 550,000, implying an average annual growth of 2.5%. Growth is not evenly distributed. High-growth regions include South Asia, East Asia and Africa, while demand from Europe and North America remains steady but modest. China's appeal has broadened as a result of active scholarship diplomacy, lower costs, and the diversification of TNE arrangements that now allow partial study pathways into Chinese universities.

China's international student base remains unusually fragmented compared with other major destinations. Unlike the US, UK, or Australia - where a few countries dominate inflows - China's largest source markets, mostly from East and South Asia, each account for only a small share of the total. This pattern partly reflects the fact that, in other leading destinations, Chinese students make up a dominant share of international enrolments, concentrating their source markets in a way China's own inflows do not. This diversification cushions against single-market volatility but also complicates recruitment strategies and programme design.

The top-sending countries continue to include Thailand, Pakistan, Bangladesh, Vietnam, Russia and several other East Asian states. These countries along with African nations represent some of the fastest-growing pools of students - driven largely by affordability, scholarships, and geopolitical proximity through the Belt and Road Initiative.

European students, though smaller in number, remain strategically significant. Students from the region tend to be more concentrated in higher-level and research programmes, distinguishing their profile from that of most other source regions. However, competition for European students is intensifying, as Japan, South Korea, and Malaysia have rolled out more targeted campaigns with English-medium offerings and simplified visa regimes.

A crucial development in China's international education strategy comes with the 2025 policy directive aimed at attracting foreign students. The new framework sets explicit objectives for quality control, diversification, and alignment with China's broader soft-power goals.

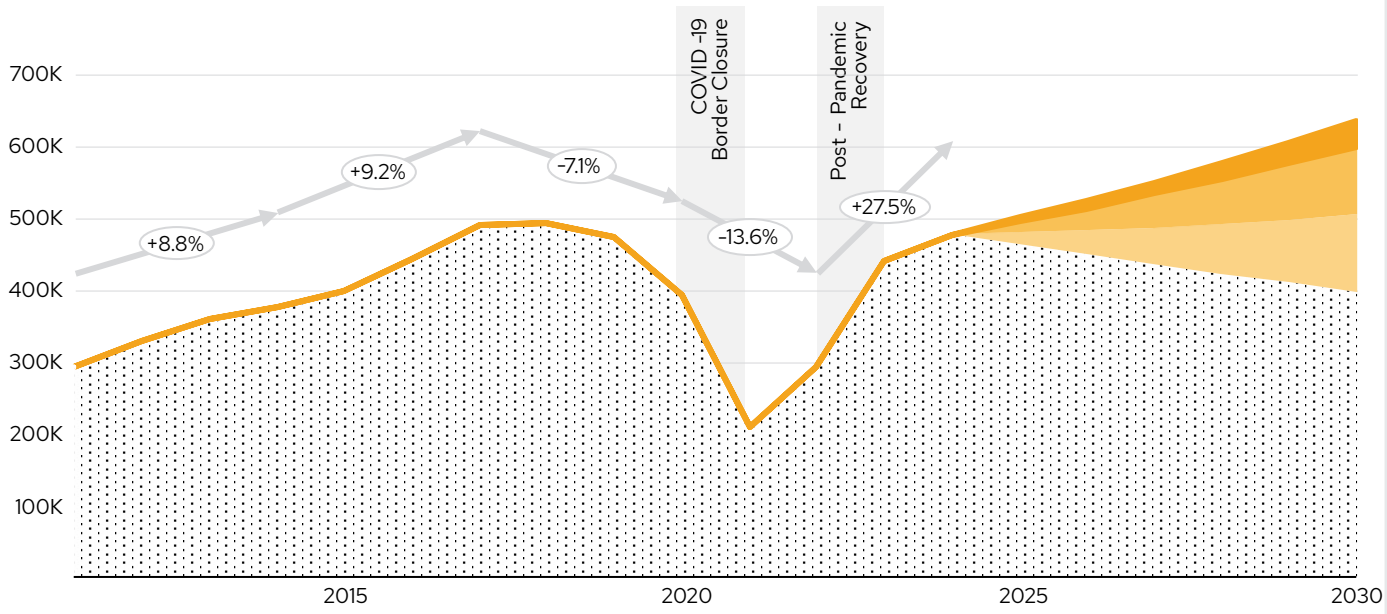
The policy's implementation coincides with the expansion of transnational education (TNE), including joint programmes and branch campuses in Belt and Road Initiative (BRI) countries. These arrangements offer students an entry point to China's education system while reducing pre-arrival uncertainty.

While growth prospects are strong, linguistic and institutional capacity remain key bottlenecks. Most international students in China still pursue programmes in Chinese, but the next wave of demand – especially from Africa and South Asia – is tilted towards English-medium instruction.

Yet, China's English-taught capacity remains limited, and far below levels in Malaysia or South Korea. If enrolments from African and South Asian countries accelerate as projected – adding 30,000 students by 2030 – this could place pressure on English-medium teaching resources, student support services, and curriculum design.

Expanding English-medium offerings will therefore be pivotal if China is to maintain its competitiveness against other Asian hubs. Without such expansion, rising demand may strain quality standards and student satisfaction, particularly in second-tier cities where international education infrastructure is less developed.

Figure 2. Total international students studying in China, 2011-2030F



Source: QS Global Student Flows, October 2025

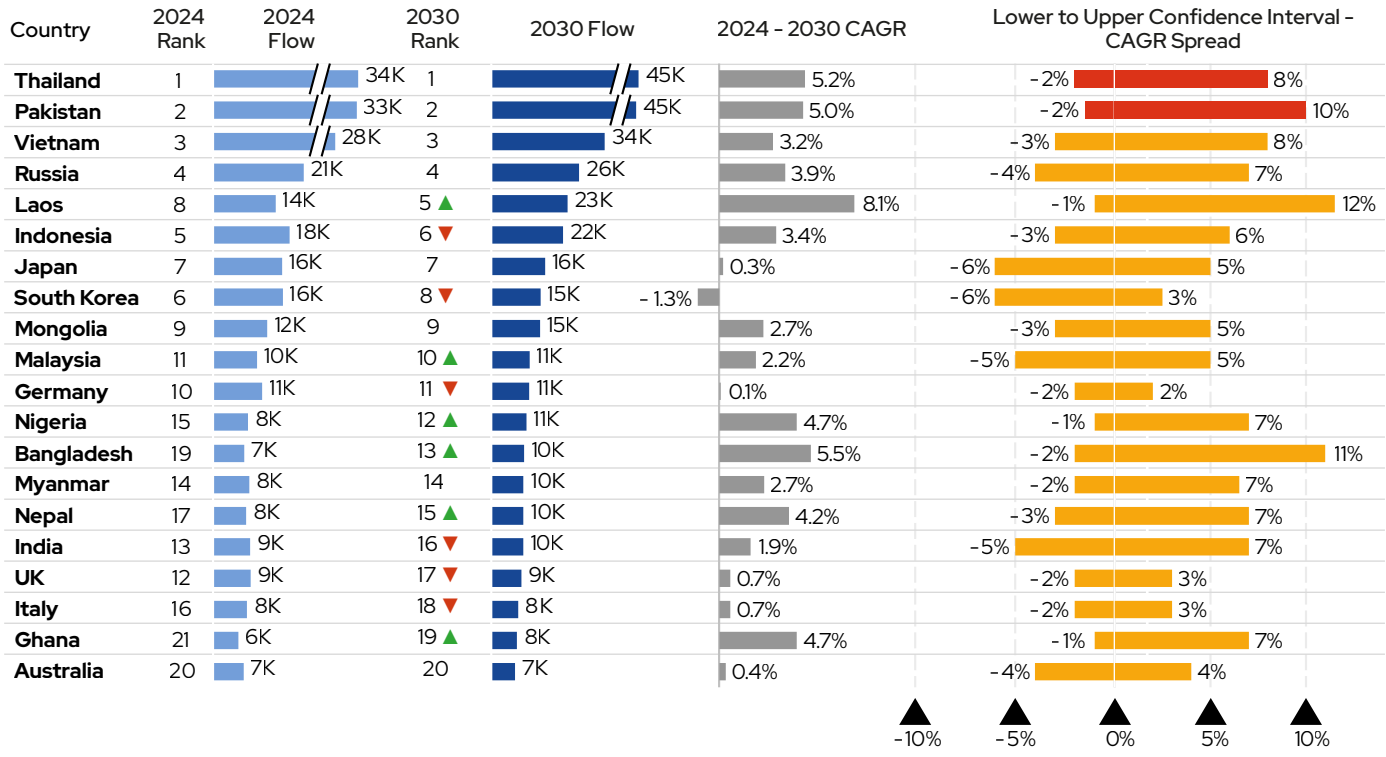
China's strongest growth outlook lies in South and Central Asia, regions where education ties overlap with trade and infrastructure diplomacy. The China–Pakistan relationship is an important one – Pakistani enrolments are expected to rise by more than 30% by 2030, underpinned by generous scholarships and institutional partnerships. Similar trends are evident in Bangladesh and Uzbekistan, where governments increasingly view Chinese degrees as pathways to technical and engineering expertise.

These markets are characterised by price sensitivity but also strong cultural and political alignment. For China's universities, they represent steady, if low-margin, growth. However, they also raise questions about diversification and integration – how to accommodate large cohorts whose primary motivation is affordability and scholarship availability rather than academic ranking.

China's foreign student strategy now sits alongside a more crowded regional field. Japan and South Korea are executing high-visibility internationalisation campaigns, combining aggressive marketing, post-study work rights, and strong English-medium offerings. Malaysia, meanwhile, has positioned itself as a bilingual, low-cost English-language hub, appealing to the same demographic segments China is now seeking.

The projected rise in foreign students – potentially surpassing 550,000 by 2030 – will test the resilience of China's higher education system. For China, the challenge will be maintaining quality amid expansion, and ensuring provincial universities are equipped to share the load. The success of China's internationalisation agenda will depend not only on attracting more students but on sustaining satisfaction, employability, and cultural integration outcomes that reinforce China's reputation as a study destination.

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



Source: QS Global Student Flows, October 2025

The three scenarios for 2030

and how they impact China

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

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

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

Regulated Regionalism

Regulated Regionalism reflects a future where China pursues a coordinated strategy to become a global education power by 2035. While global perceptions of Chinese education have historically lagged behind, government-led initiatives and significant investment are attempting to improve its reputation. Driven by the 'Study in China' campaign, this model is not about limiting student intake but strategically expanding it to serve national interests. In line with this, the government is actively attracting quality educational resources, particularly in science, engineering, and technology, and encouraging high-level TNE partnerships to bolster these demanding fields.

This expansion is fuelled by the rising standards and global rankings of Chinese universities and the immense soft power of the BRI. A majority of international students are from BRI nations, drawn by scholarships and demand for graduates with Chinese experience to lead key projects across Asia and Africa. These developments signal a highly interventionist and mission-driven approach to international education, directly linking it to geopolitical and economic goals.

As top destinations like the US and UK face rising costs and regulatory complexities, China's relative affordability presents an effective alternative. This is leading a growing number of students, particularly from South Asia, Southeast Asia, and Africa, to choose China for its high-quality, low-cost education and proximity to home.

This scenario reflects a future where China actively encourages and expands student mobility as part of its global outreach. China is rapidly establishing its role as a primary regional education hub, with enrolment becoming more strategically targeted, mission-driven, and aligned with its long-term national development and foreign policy objectives.

Hybrid Multiversity

The Hybrid Multiversity scenario outlines a future where China leverages its national digital education strategy to expand its global reach, allowing international students to complete foundational studies online before travelling to China for specialised, in-person experiences. China currently aims to expand the capacity and platforms for practical and online education as part of its plan to be a global education powerhouse by 2035. To achieve this model, China must invest heavily in high-quality digital infrastructure, bilingual online learning platforms, and cross-border education partnerships with universities in Asia, Africa, and the Middle East.

In this model, students begin their degrees offshore through state-backed Massive Open Online Course (MOOC) platforms. Chinese platforms like XuetangX and iCourse International already host thousands of university courses, many in English. Alternatively, they can study at one of the more than 1,000 Sino-foreign joint venture or international branch campuses (IBCs) operating within their home regions. The onshore component in China is reserved for high-value activities such as advanced lab work, capstone projects, and internships with leading Chinese companies in technology and international trade.

Preparatory language courses are also delivered through a blended model. Students begin learning Mandarin remotely via specialised platforms from institutions like Beijing Language and Culture University (BLCU) before transitioning to an immersive environment in China. This approach allows physical university campuses to be utilised for hands-on learning and research, supported by the world's largest digital education resource repository, the 'Smart Education of China' platform.

The Chinese government champions this hybrid model as a strategic tool for international outreach and soft power, rather than a means to manage migration. By exporting its digital education platforms and standards through initiatives like the World Digital Education Alliance, China aims to deepen its integration with the Global South and BRI countries. This strengthens regional influence by embedding Chinese technological and educational norms globally.

This model presents a highly scalable, affordable, and flexible pathway to a Chinese-accredited degree, significantly lowering barriers to entry for students worldwide. Widespread adoption would cement China's position not just as a destination for students, but as a global provider of digital education infrastructure and content.

Talent Race Rebound

Talent Race Rebound outlines a scenario where international education becomes a primary instrument for addressing China's long-term demographic challenges and immediate high-tech skills shortages. Guided by the 'Education Blueprint 2035', the government is strategically positioning the country to attract and, crucially, retain a new generation of highly skilled global talent in priority sectors.

Under this model, China is implementing a highly targeted talent acquisition strategy. This is centred on the new K visa, effective 1 October 2025, which aims to attract young international graduates in STEM fields. This policy creates an expedited pathway by removing the traditional requirement for prior work experience or employer sponsorship – a significant advantage over the more restrictive immigration systems in the West. This aligns education and immigration policy directly with the nation's workforce needs in strategic areas like AI, advanced manufacturing, and green technology.

For international students, the appeal is powerful, offering not just world-class qualifications but also one of the clearest post-study work pathways available globally. This is particularly attractive to graduates in high-demand fields who see a direct route to employment with China's technology giants like Huawei and Tencent. The proposition is further strengthened by significant regional incentives, including housing subsidies and start-up funding in key innovation hubs like Shenzhen and Shanghai.

At its core, this scenario reflects a pivot from using international education primarily for soft power to employing it as a vital pipeline for skilled migration. Students with qualifications in strategic fields are viewed as essential future contributors to China's innovation economy, ensuring the nation has the human capital required to overcome demographic headwinds and lead in the global race for technological supremacy.

Outbound trends

Study abroad

For decades, the 'Big Four' Anglophone destinations – the US, UK, Australia and Canada – dominated flows from China, the world's largest source of international students. However, recent years have seen a significant shift, with visa restrictions, lower approval rates, and student caps beginning to reshape mobility patterns, pushing more Chinese students toward destinations outside the 'Big Four' that offer proximity, affordability, and quality education.

Countries across Asia are increasingly benefiting from this redirection. South Korea, Malaysia, Vietnam, and New Zealand are among the fastest-growing destinations, with projected growth rates of between 7-9%, over the next five years compared to the sub 5% growth rates or even contractions projected for the 'Big Four'. Malaysia, in particular, has become a major hub, with Chinese students making up nearly 40% of its international enrolments. These destinations are rising in appeal because they combine cultural familiarity, cost advantages, and strong higher education systems.

By contrast, growth in the 'Big Four' is slowing and eventually flattening. This has been reflected in a drop in Chinese student enrolments in Canada, due to the introduction of post-graduation work permit (PGWP) limitations and student caps in 2024, creating uncertainty for prospective students. This drop is further expected to continue at a rate of around -1.3% over the next five years. In the US, continuing trade tensions and the lingering effects of Trump-era restrictions have contributed to declining enrolments, with new enrolments projected to shrink by nearly 1% over the next five years. The UK, although still more attractive than most alternatives, is becoming prohibitively expensive for many Chinese families given China's slowing economy, and its growth is expected to slow to a compound annual rate of just 0.4%, down from a modest 4% increase in previous years. Of the 'Big Four' Australia is likely to remain the most appealing Anglophone destination, with enrolments projected to grow at 3.4% annually. Even so, rising visa fees and the introduction of the Genuine Student test are expected to moderate this growth and redirect more students to closer Asian alternatives.

The impact of these shifts is already visible. Between 2019 and 2024, the share of Chinese student enrolments in the 'Big Four' fell from 64% to 56%, while Asian destinations registered a 6% increase post-COVID. Underlying this transition are both policy and economic drivers, including stricter migration rules in Australia and Canada, continuing uncertainty in the US, the rising costs of UK study, and the desire of Chinese families to prioritise affordability, safety, and proximity.

The market is also shaped by degree level. Undergraduate students prioritise prestige and brand value, keeping elite US and UK universities in demand among affluent families. Postgraduate students, who are more sensitive to policy and cost, focus on efficiency and return on investment (ROI). While the UK's one-year master's programmes remain appealing, recent policy restrictions in the 'Big Four' have driven many postgraduate students toward Asian and European institutions. Overall, Chinese outbound mobility will continue to grow, but the Anglophone nations' share is likely to decline as students seek clarity, stability, and affordability.

European destinations, such as Spain, are also projected to expand, with Spain expected to grow at a CAGR of 5.2%. Across Europe as a whole, Chinese student enrolments are forecast to rise at around 3.3%, as the region increasingly

positions itself as a cost-effective, high-quality alternative to the Anglophone countries. Affordability and strong university rankings remain top priorities for Chinese families, and Europe's relatively low tuition fees, along with tuition-free universities in some countries, are strong pull factors. However, challenges such as housing shortages and rising rents in major European cities may slow the pace of growth. Even so, Europe's appeal is growing steadily, though East and Southeast Asian destinations are set to remain the primary choice for many Chinese students in the years ahead.

Looking ahead, East and Southeast Asia are set to capture a majority of the growing share of Chinese student flows. Destinations such as Japan, Singapore, Hong Kong (SAR), Malaysia, South Korea, Thailand, and Vietnam are positioning themselves as major education hubs, offering high-quality universities and cultural proximity at a lower cost. With demand for overseas education remaining strong, especially at the postgraduate level, these regional destinations are well placed to benefit from the changing dynamics of Chinese outbound mobility.

Transnational education

The expansion of TNE by Chinese higher education institutions presents a distinct model, primarily focusing on international branch campuses (IBCs), which contrasts with the diverse TNE portfolios of major exporters like the 'Big Four' destinations. This distinctive approach is a direct reflection of the rigorous regulatory environment overseen by the Chinese Ministry of Education, particularly concerning joint institutes, programmes, and co-operative ventures. Unlike the predominantly commercially driven TNE strategies of Western nations, the outward expansion of Chinese higher education institutions is rooted in strategic political objectives. The primary goal is to elevate the international recognition and reputation of Chinese institutions. Consequently, the international branch campus model is favoured as it grants superior control and visibility, serving this strategic purpose far more effectively than joint programmes or other partnership arrangements.

The TNE market of China is therefore characterised by a reliance on IBCs, with partnerships being rare. These branch campuses are strategically concentrated in Southeast Asia and Central Asia. Notably, Malaysia hosts one of the first and largest of these campuses, enrolling over 8,700 students. Other key locations include Japan, Singapore, and Laos. Contrastingly, establishment in the Western world remains minimal. This geographic expansion is observed to be conducted in close alignment with the BRI, utilising the institutions to strengthen political and educational ties within the Southeast Asian region.

When compared to established TNE leaders such as the US and the UK, China's market is significantly less developed in terms of volume. While the UK and the US operate more than 40 international branch campuses and joint partnerships, China has yet to achieve double-digit figures. This disparity is attributable to several key factors. Firstly, the US and UK HE systems possess greater, long-standing global recognition compared to the relatively newer international Chinese HE market. Secondly, the TNE markets of the US and UK are more flexible and market-driven, whereas the Chinese market is heavily regulated by legislation such as the Sino-Foreign Cooperation in Running Schools regulations.

Despite lagging behind in volume, the Chinese TNE market is a sector of significant potential and growth. Proposed IBCs in countries like Kazakhstan and Uzbekistan signal a strong commitment to the internationalisation of Chinese universities. However, this expansion faces considerable hurdles, primarily stemming from reputational challenges and geopolitical suspicion.

Online and hybrid

Online education in China is a rapidly growing market segment designed to aid Chinese universities' strategic goal of achieving greater global recognition and influence.

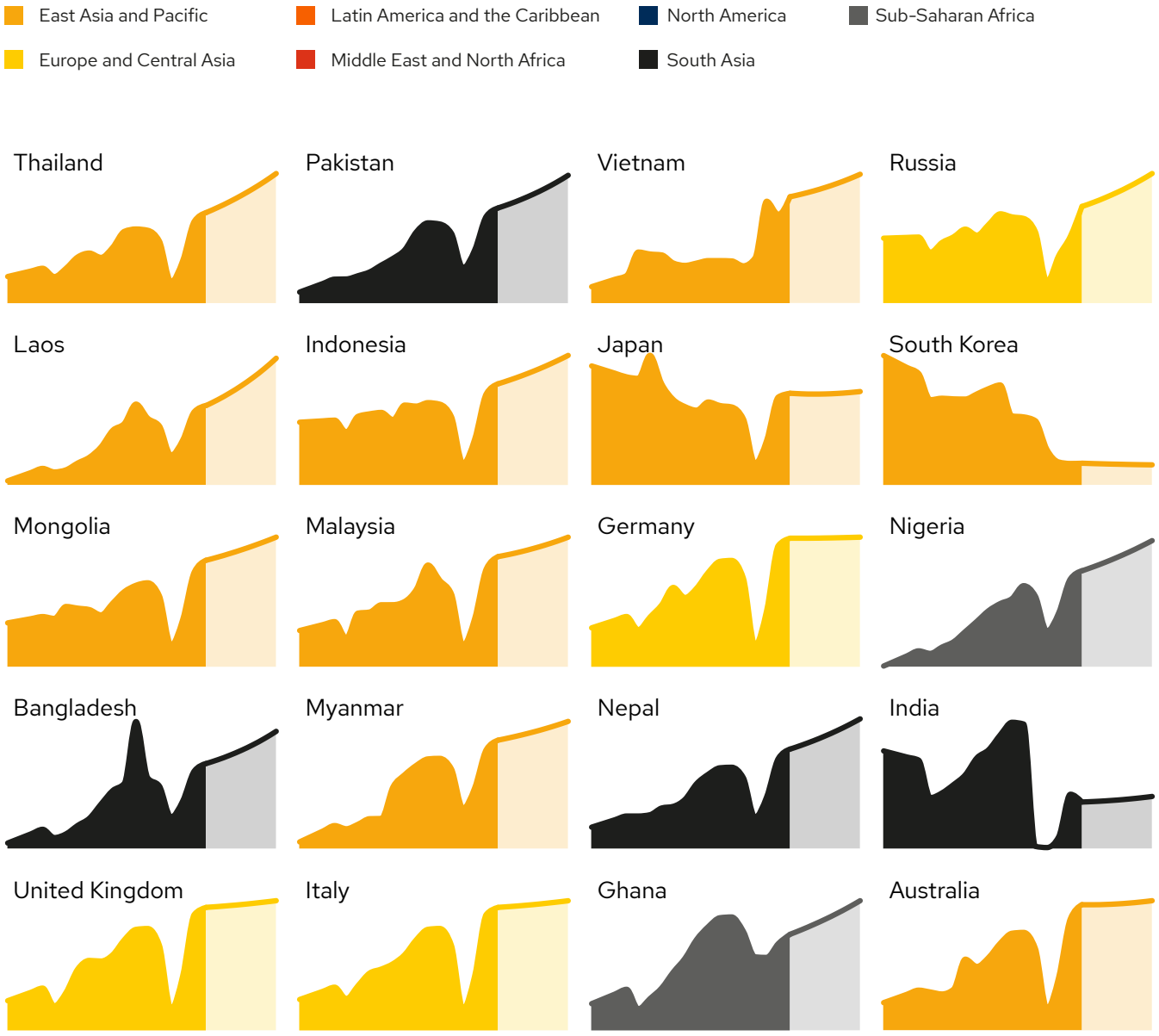
The Chinese market has established itself as one of the world's largest online learning ecosystems, successfully offering numerous Massive Open Online Courses and non-degree programmes. This massive capacity is underpinned by a large, state-backed edtech market, providing the necessary digital infrastructure for rapid expansion. In the degree space, the market shows momentum, evidenced by a reported 1,634,200 new online learners enrolling in undergraduate programmes in 2024. While a significant volume of China's online provision is currently concentrated on non-degree Chinese language and culture courses, a strategic transition is underway toward increasing the offering of online degree programmes.

Globally, the Chinese online education market remains significantly smaller than Western powers regarding the scale of degree offerings. However, it is a prominent competitor in the non-degree space, boasting more than 20,000 courses and numerous online platforms. The growing Chinese online market benefits substantially from active government support. This is demonstrated by notable state-backed programmes, such as the 'Smart Education of China' initiative, which aims to implement an integrated online platform to enhance the accessibility and quality of digital education. In 2024, the platform attracted users from more than 200 countries.

Nonetheless, the primary strategic struggle China faces is the challenge of converting its vast infrastructure and numerous course offerings into qualifications that are globally recognised and desired by a diverse international student body. Ultimately, China's future success as a TNE exporter depends on whether its significant digital capacity can translate into a globally accepted academic entity, allowing it to move from simply challenging Western TNE dominance to establishing its own internationally respected educational curriculum.

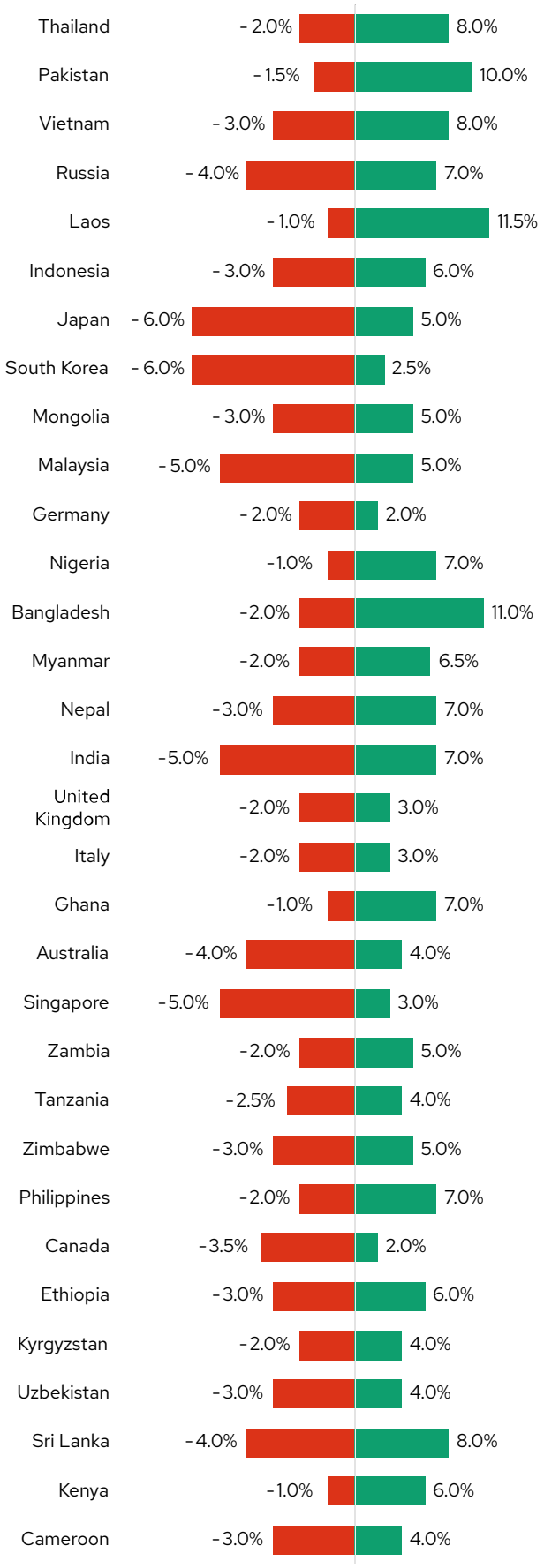
Student origins

Figure 4. China major student origin growth, 2000–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

Figure 5. Chinese student origin growth outlook, lower and upper 95% confidence intervals, 2024–2030F



Source: QS Global Student Flows, October 2025

South Asia

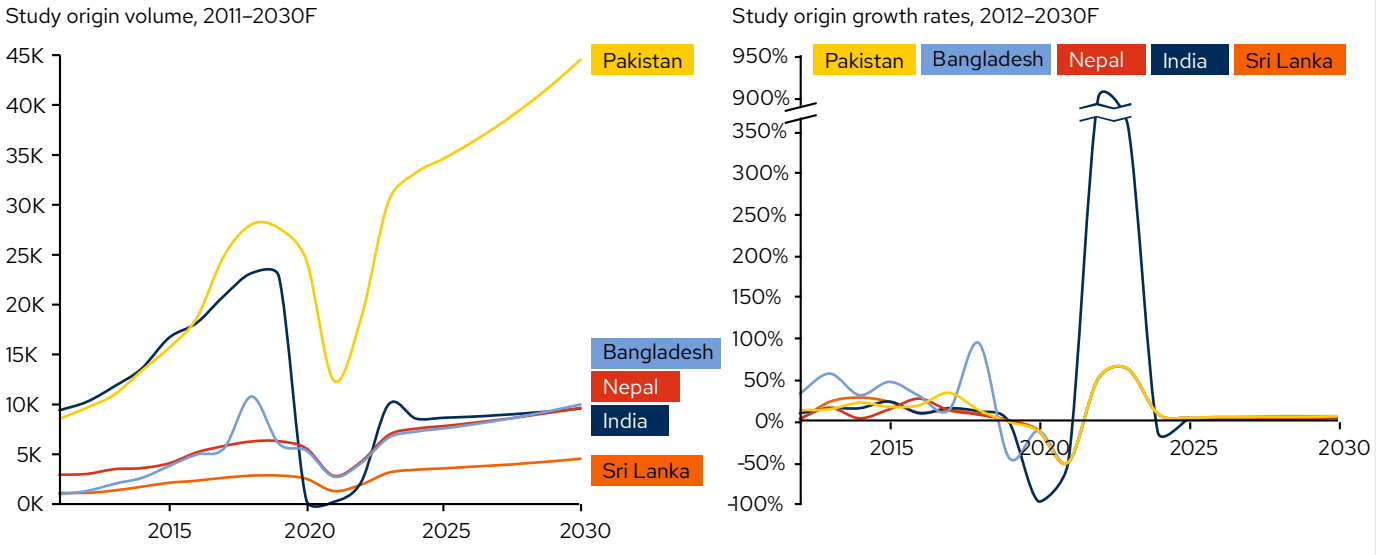
Student flows from South Asia to China are projected to grow modestly at an average of 4.5% annually over the next five years, marking a restrained recovery after COVID-19 disruptions. South Asian students account for around 13% of China's 476,000 international students in 2024. Growth ahead will be driven by scholarships, relatively low tuition and living costs, and an expansion of English-taught programmes. At the same time, uneven recovery across countries reflects visa frictions, language requirements, and broader geopolitical factors.

Country-level patterns show some clear divergence. Pakistan accounted to close to 39% of South Asia's students in China before the pandemic, thanks to scholarship pipelines, and active recruitment by Chinese universities, especially in medicine and engineering. India's share has dropped sharply from around 32% pre-COVID to just 11% in recent counts, with visa restrictions, recognition issues around Bachelor of Medicine, Bachelor of Surgery (MBBS) degrees, and flight limits slowing the rebound, though affordability and English-medium programmes still keep China in play against cheaper alternatives. Bangladesh is picking up again, helped by China Scholarship Council awards and over 50 bilateral government scholarships in 2023–24, and demand is clustering in cost-sensitive fields like medicine, business, and engineering.

Recent analysis highlights a shift in Indian student preferences, with many looking beyond traditional Anglophone destinations and prioritising affordability, return on investment, and recognition. In China, this flow is fundamentally concentrated in undergraduate medical programmes. The smaller postgraduate share reflects China's lack of post-study work and immigration routes, but low-cost English-medium MBBS degrees keep it competitive for cost-sensitive families if funding pipelines remain strong and the employability of degrees is reinforced.

Pakistan will remain the anchor market, India's recovery will be slow, and Bangladesh and Sri Lanka should add steady gains. Growth will cluster in cost-sensitive fields like medicine, engineering, and business, with the outlook depending on China's ability to sustain funding and strengthen the value of its degrees.

Figure 6. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

East Asia

East Asian students have traditionally made up over 25% of China's international student population, but this share has declined to around 13% today. However, student flows from the region are expected to grow at a moderate pace of around 3% over the next five years. This growth is driven by the strong global rankings of China's leading universities and the government's strategic 'Study in China' initiative.

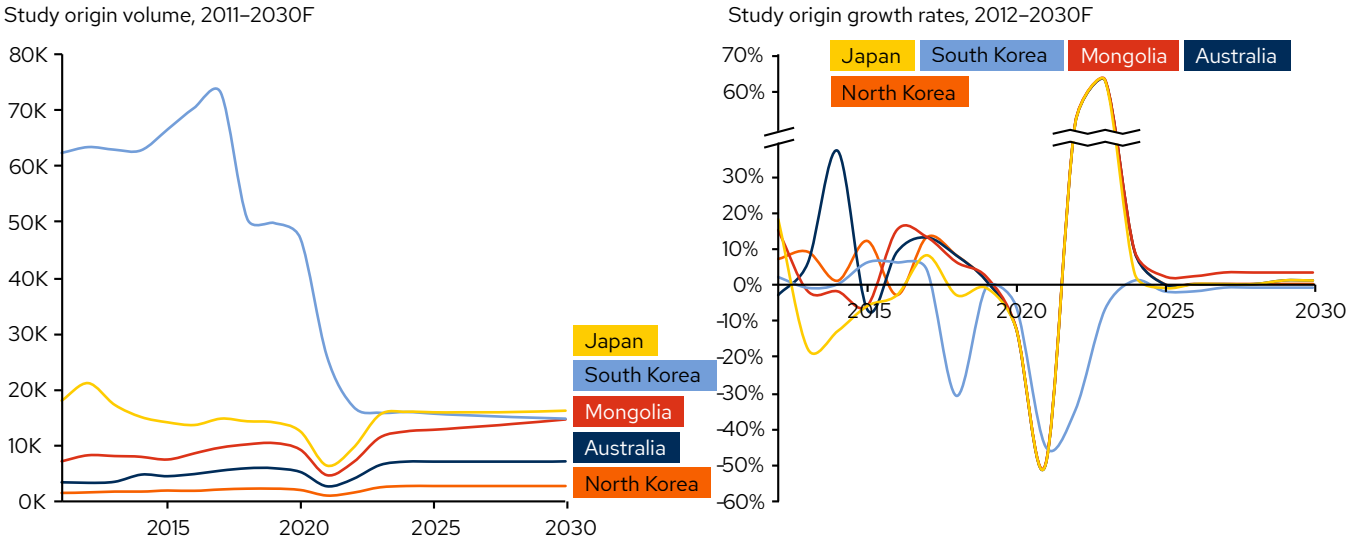
South Korean enrolments saw a steep decline of approximately 20% between 2019 and 2024, whereas Japan has rebounded by nearly 30% in recent years. By 2030, South Korean and Japanese students are projected to each comprise 3% of China's international population, while Mongolian enrolments are anticipated to rise substantially, reflecting diverse recovery patterns and sustained regional interest.

Despite these fluctuations, China remains a leading destination for East Asian students. Its universities have steadily improved in rankings through investments in research infrastructure, and faculty development. Geographical proximity, cultural familiarity, and established Chinese communities further reinforce the country's appeal.

Policy and perception play a major role in shaping student mobility. South Korean and Japanese students, who have traditionally pursued studies abroad to gain international credentials and boost career prospects, are increasingly considering regional alternatives or postponing their plans, influenced by factors such as geopolitics, safety concerns, and demographic changes. Initiatives like the K visa, effective from October 2025, aim to attract STEM graduates by allowing them to study and work in China without a pre-arranged sponsor or job offer, underscoring China's proactive approach to maintaining its regional competitiveness.

China's universities hold growing recognition across East Asia, and scholarships and visas provide strong incentives. Yet sustaining and expanding these flows will require consistent policies and continued investment in quality, infrastructure, and student support to reassure families and secure China's position as a trusted study destination.

Figure 7. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

Africa

African students' interest in China is expected to grow at an average rate of 2.2% over the next five years, fuelled by the deepening of diplomatic and economic ties between China and the African continent. China already offers substantial financial support and is expanding academic opportunities through bilateral agreements. As of 2024, African students accounted for around 17% of international student enrolments in the country.

Nigeria remains the leading African source country for China, accounting for nearly 10% of African students, with around 8,100 enrolled in 2024. This strong presence reflects close diplomatic ties and educational agreements between the two countries. Ghana and Tanzania are also emerging as important contributors, with their student numbers projected to rise by 4.7% and 1.8%, respectively, between 2024 and 2030.

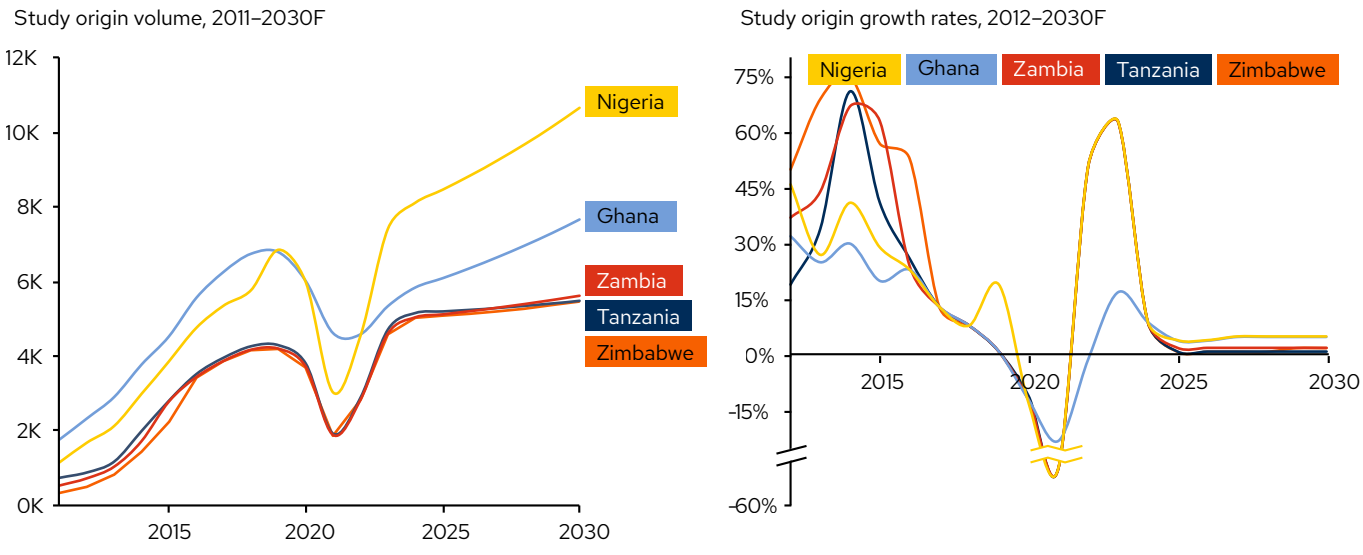
China remains the second most popular destination for African students studying abroad. As part of their strategic outreach, Chinese universities are increasingly welcoming and prioritising students from Africa.

Educational exchanges have become a key component of this strategy. In 2018, Chinese President Xi Jinping announced the country's commitment to providing 50,000 scholarships and an equal number of training opportunities for African students over three years.

In August 2025, China introduced the K visa category to attract foreign STEM talent. While this presents opportunities for some, post-graduation visa policies remain restrictive for most, likely pushing African graduates to return home and apply their newly acquired skills locally. This may deter students seeking international work experience after completing their studies. Limited English-medium instruction capacity is another challenge.

The appeal of high-quality education, affordable fees and financial support means that China will continue to attract students. China's ability to offer clearer post-study pathways, strengthened English language instruction, and expanded access to industry placements will be critical in maintaining and growing its position as a top destination for African learners.

Figure 8. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

Europe

In recent years, European students numbers have grown at a compound annual growth rate (CAGR) of 1%, with undergraduate enrolments expected to remain slow due to challenges like language barriers and differences in academic culture. However, postgraduate programmes are emerging as a key growth area. Although demand is moderate, Chinese universities continue to prioritise attracting European students, enhancing growth through academic exchanges and research collaborations.

European students account for around 22% of international enrolments in China. Many Chinese universities have developed strong academic ties with European institutions as part of their broader effort to internationalise their higher education sector. Joint degree and exchange partnerships form a key channel for European student mobility to China.

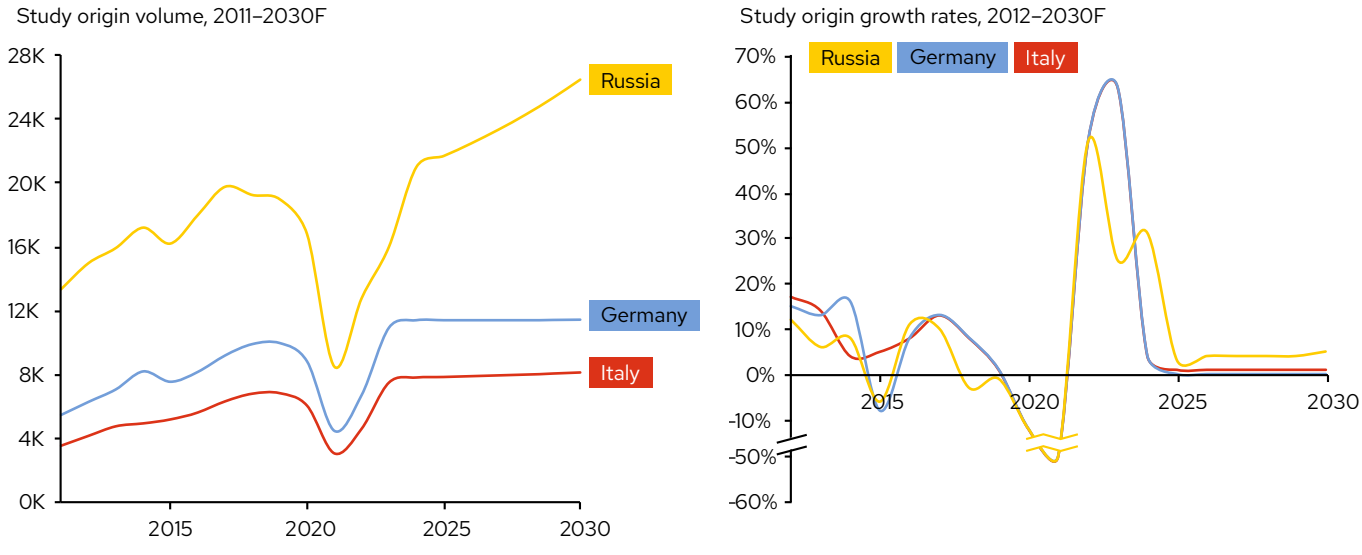
Before the COVID-19 pandemic, France was among the leading source countries, with around 10,600 students recorded in 2018. However, the number of French students in China saw a 31% decline during the pandemic.

The China-France initiative, launched in 2024, aims to send over 10,000 students to China within the next three years, while also doubling the overall number of European youth participating in Sino-European academic exchange. These efforts reflect a broader commitment to rebuilding and expanding long-term academic cooperation between China and Europe.

There is renewed strategic focus on attracting students from underrepresented groups, particularly Europe. According to China's Education Modernisation 2035 plan, the emphasis on the 'Study in China' initiative is shifting, with targeted efforts to diversify the international student population.

Despite these positive developments, challenges remain in attracting European students. Differences in academic culture and language barriers can deter long-term enrolment from European students. Nevertheless, China's growing global academic reputation, financial incentives, and strengthened institutional partnerships continue to enhance its appear among European students.

Figure 9. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

Southeast Asia

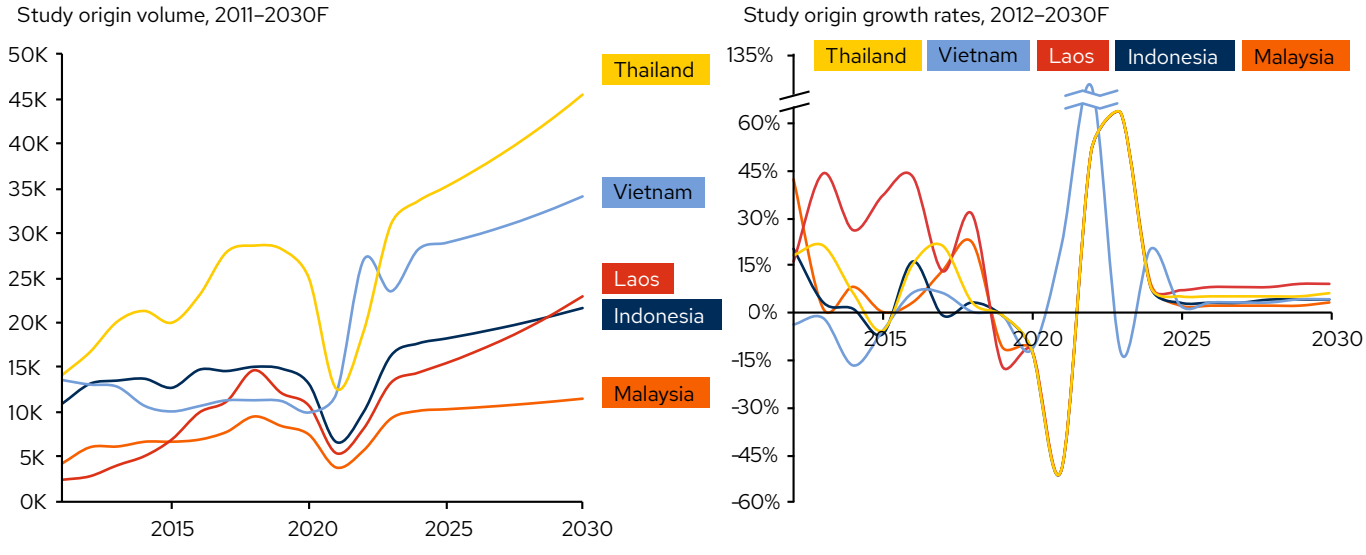
Southeast Asian students have traditionally formed one of the largest regional cohorts in China's international education landscape, and this trend is expected to continue with moderately strong growth. This expansion is driven by the region's geographical and cultural proximity to China, as well as the incentives and support offered through China's strategic 'Study in China' initiative. In 2023, China hosted 7% of Thai, 4% of Indonesian, and 5% of Vietnamese students, highlighting its position as a leading destination in the region. Proximity, lower costs compared to Western countries, and opportunities to learn Mandarin continue to drive this mobility.

Between 2021 and 2023, enrolment trends across Southeast Asia varied significantly. Thailand recorded the sharpest drop due to COVID-19 restrictions, with student numbers falling by almost half in 2021 before rebounding by over 60% in 2023 as mobility resumed and the 'Study in China' initiative boosted recruitment. From Vietnam, after a modest 12% decline in 2020, enrolments surged by 125% in 2022, making it the fastest-growing market in the region. Indonesia and Malaysia saw sharp contractions of around 49% in 2021, largely due to COVID-19-related travel restrictions, before recovering by approximately 63% in 2023 as mobility resumed and universities strengthened outreach through partnerships and scholarship schemes.

China continues to be an attractive destination for students in the region. Rising global rankings of Chinese universities, targeted initiatives under the 'Study in China' programme, and expanded exchange partnerships, particularly with Malaysia, Thailand, and Vietnam, have reinforced its appeal. Regional students are also drawn by the practical benefits of studying in China, including opportunities for internships, enhanced Mandarin skills, and a China-linked degree, which is increasingly valued in both domestic and regional job markets.

Forecasts indicate modest growth, with Thailand projected to increase by around 5%, Vietnam and Indonesia by roughly 3%. Supported by ongoing scholarships, research collaboration, and strong cultural and geographic ties, China is likely to remain Southeast Asia's leading higher education destination within the region.

Figure 10. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

Middle East and North Africa

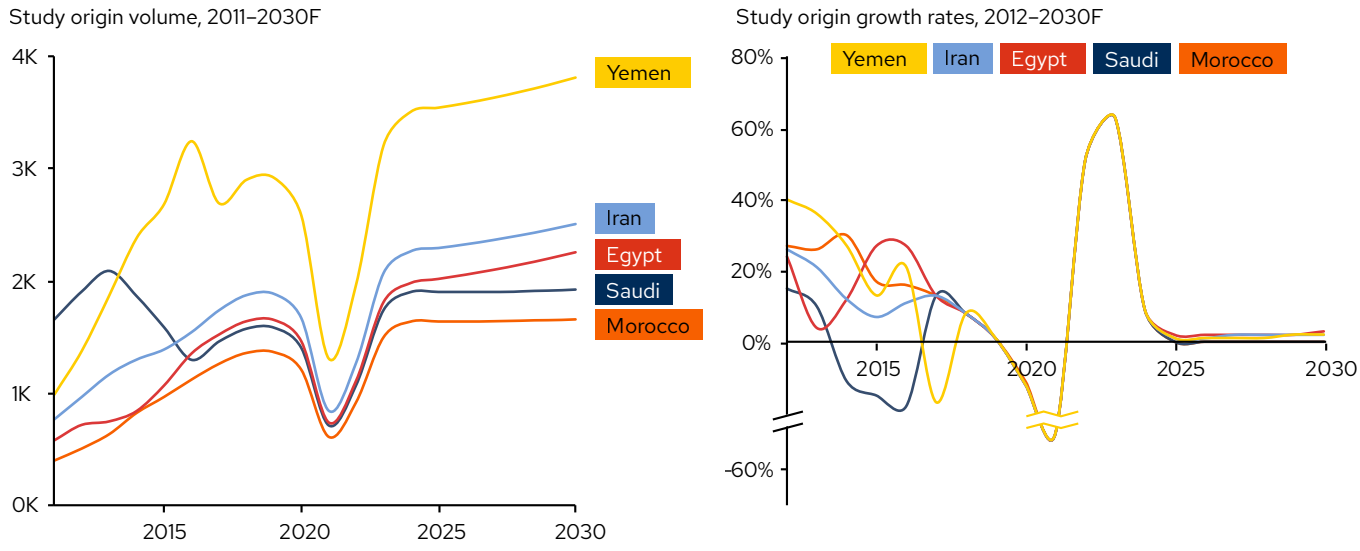
Student flows from the Middle East and North Africa (MENA) to China are forecasted to expand modestly, with a projected CAGR of 1.1% between 2024 and 2030. This follows a stronger pre-pandemic growth period of nearly 4% annually (2017–24) and a post-COVID rebound that has already pushed volumes back to 120% of 2019 levels by 2024. China's strong scholarship outreach, BRI diplomacy, and lower-cost education model create demand, though recovery remains uneven across the region.

Historically, China has positioned itself as a major education partner for the MENA region. Targeted government scholarships, bilateral agreements, and Confucius Institute partnerships have consistently raised placements. Yemen, Iran, and Egypt feature among the most active senders, while Gulf countries also contribute steady cohorts through government-sponsored students. Medical education remains the standout draw. The rapid expansion of English-medium courses in recent years has broadened access.

MENA governments are actively using education as part of broader economic and diplomatic ties with China. BRI projects, infrastructure investment, and bilateral memorandums of understanding (MOUs) have created strong pipelines for scholarships and joint programmes. For students, the appeal lies in affordability and the professional value of Chinese degrees in fields aligned with regional development priorities. At the same time, challenges remain. Degree recognition varies across home countries, Mandarin proficiency is often required for internships or clinical training, and some students remain cautious due to long-term career or geopolitical uncertainties.

Overall, MENA to China mobility will likely remain steady, anchored by state-sponsored students and scholarship pathways. Growth will be concentrated in medicine, engineering, and technology, but broader expansion will depend on how well China addresses recognition, language, and mobility barriers in the years ahead.

Figure 11. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

Latin America

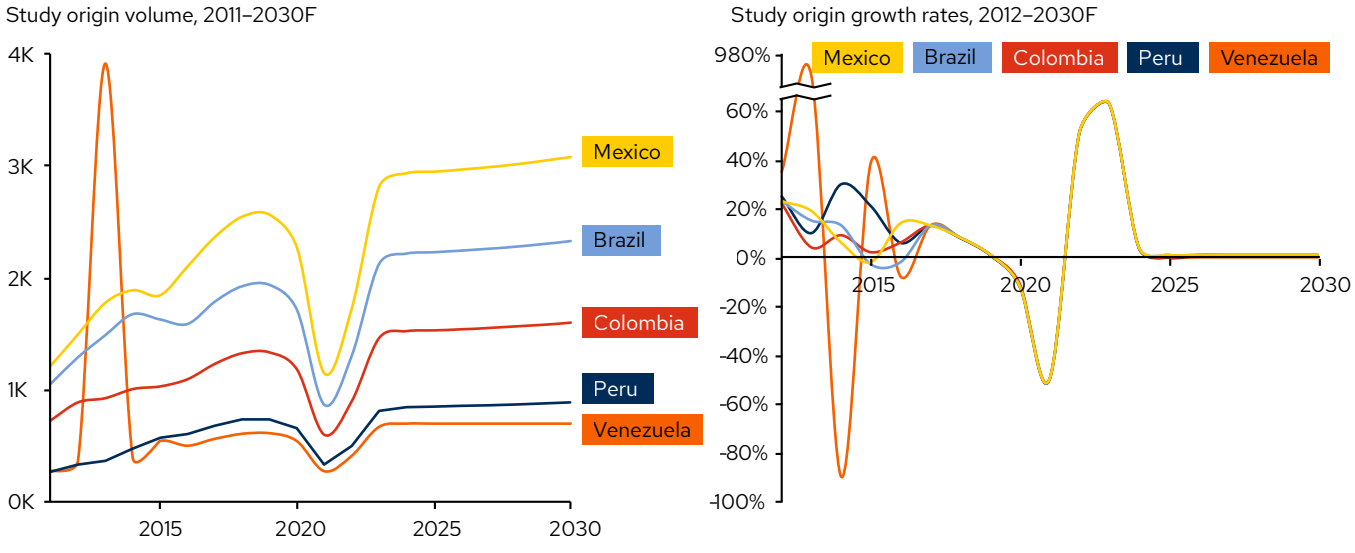
Student flows from Latin America to China are expected to stabilise and grow at a modest rate of 0.5% annually over the next five years, reflecting a slow recovery after COVID-19. Growth is supported by scholarships, training, expanding English-medium courses, and career opportunities linked to China's economic influence and the Belt & Road Initiative. At the same time, visa requirements, language barriers, limited awareness of Chinese higher education, and strong competition from traditional destinations like the US and Europe constrain faster growth.

Mexico and Brazil remain anchor markets, with factors like Mexico receiving full postgraduate scholarships in 2025 and Brazil benefiting from Belt & Road engagement and broader scholarship opportunities. Colombia, having joined the Belt & Road Initiative in 2025, is beginning to leverage funding for projects in artificial intelligence and youth employment, providing additional motivation for students to pursue studies in China. Peru and other countries are seeing modest increases of 0.8%, while Panama and smaller nations contribute only limited flows.

Field-level patterns indicate that Latin American students are most attracted to engineering, medicine, business, and international relations, reflecting both China's comparative strengths and the global demand for professionals familiar with China's economy. Rising English-medium offerings up nearly 12% between 2021 and 2023, enhancing China's appeal, particularly for students seeking internationally recognised credentials without incurring the higher costs associated with Western destinations. Affordability, safety, and straightforward admission procedures remain additional pull factors.

Nevertheless, challenges persist. Language remains a primary barrier. Students may also face adjustment issues due to differences in teaching methods, expectations, and assessment styles. Geopolitical dynamics and limited recognition of certain Chinese qualifications in Latin American professional systems may further temper growth.

Figure 12. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

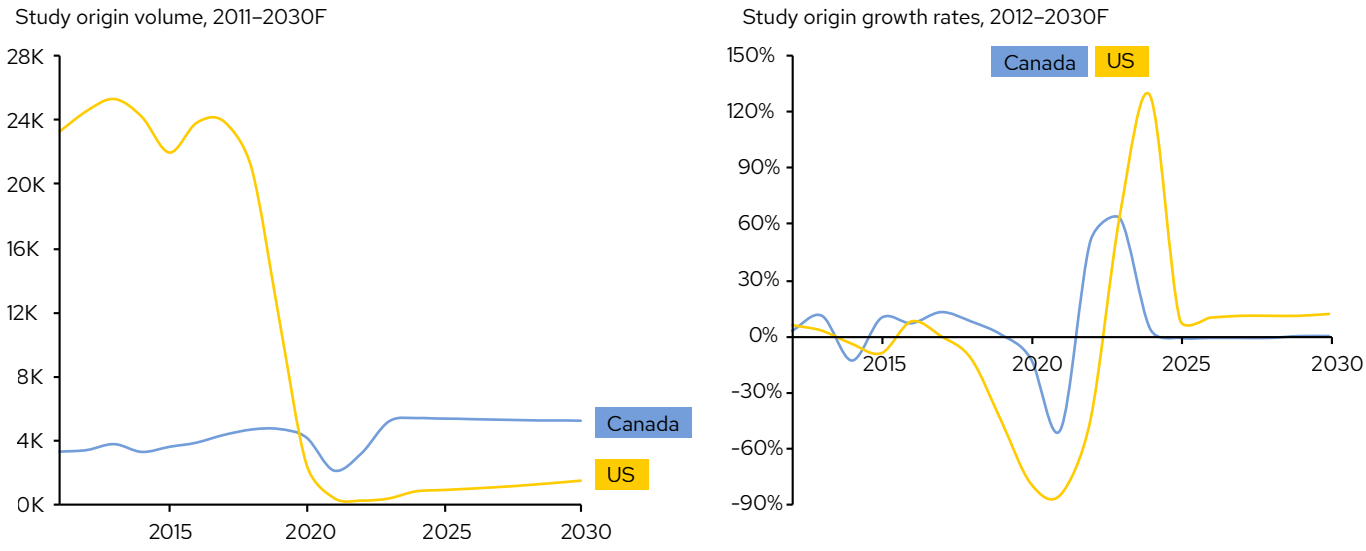
US and Canada

Student mobility from the US and Canada to China has remained limited in recent years, with enrolment numbers largely stagnant or declining. North American students account for approximately 1% of China's international student body. Enrolment numbers from the US and Canada to China declined sharply in 2021, dropping by 85% and 50% respectively. Once driven by academic ambition and new English-taught offerings, China's rise as a top study destination now unfolds against a backdrop of strained geopolitics and post-pandemic adjustment, both of which are increasingly determining inflows from this region.

Despite a long history of academic exchange, student mobility between China and North America is now defined less by educational opportunity and more by the broader tenor of US-China relations. Political tensions, export controls, and security-related scrutiny have reshaped perceptions of academic engagement on both sides. Although both governments continue to voice support for educational exchange, the underlying atmosphere of strategic competition has muted those efforts. While the US government has recently suggested it would like to attract more Chinese students to the country, such statements are unlikely to translate into durable policy shifts, given the cyclical nature of relations between the two countries in recent years.

Canada–China exchanges have shown a modest rebound. Canadian student enrolments in China have now surpassed pre-pandemic levels, exceeding 5,000 in 2024, suggesting that political headwinds have had a less pronounced effect compared to the US. However, even these gains are occurring within a more cautious context, with universities and policymakers wary of overexposure amid tightening geopolitical alignments. For China, efforts to sustain its position as a global education hub - through expanded English-taught programmes, new visa categories, and targeted scholarship initiatives - continue, but the effectiveness depends on external relations. For now, North American participation in China's education system appears to be stabilising at a low base rather than staging a meaningful recovery.

Figure 13. China student origin growth, 2011–2030F, point estimate growth outlook



Source: QS Global Student Flows, October 2025

Drivers for growth

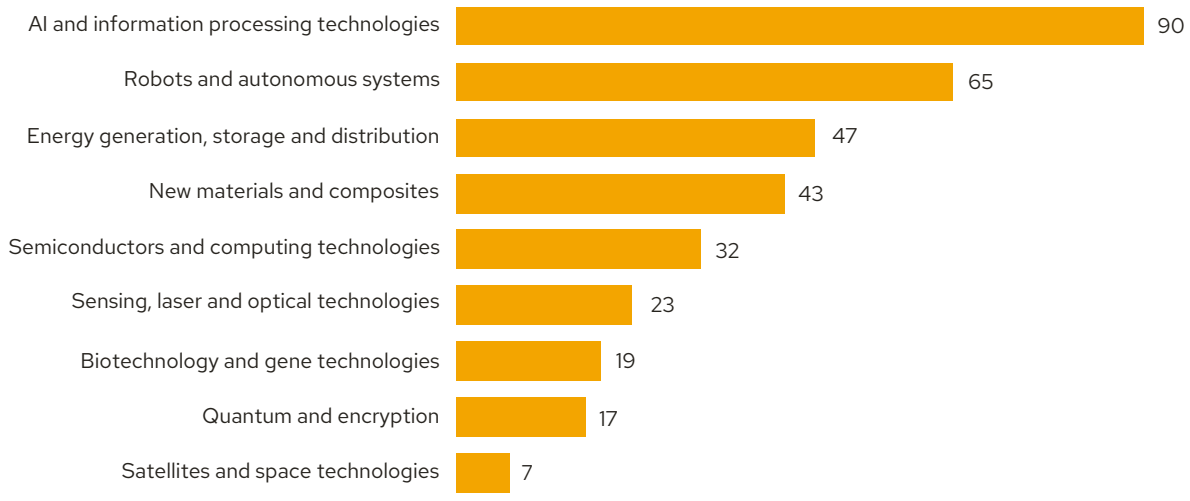
Labour market dynamics

Skills shortages are the real pull factor

A number of trends are expected to transform China's labour markets by 2030. An ageing and declining working-age population, coupled with organisational culture and resistance to change will likely be the key barriers preventing businesses from making the necessary investments in technologies to automate and augment their workforce. Since industry talent shortages are seen by many to be a key barrier to further economic transformation, it's clear the country's burgeoning higher education sector has a critical role to play in minimising the impact of these trends. However, the sector will need support to connect the potential of its domestic and international student populations with the needs of employers in order to maintain economic growth levels.

The risk of any imminent skills shortages is well documented and it's clear that the potential impact will be focused in highly skilled sectors. According to the World Economic Forum's Future of Jobs Report (Figure 14), 90% of employers accept that AI and information processing technologies will likely be the biggest driver of business transformation in the future, with robots and autonomous systems also seen as a significant driver by 65%. Equipping graduates with these digitally oriented, high-value skills required by employers should be a priority for universities. Fortunately, China's higher education already provides a strong foundation, with its institutions playing a leading role in future-focused education. However, it is vital to ensure that graduates are equipped with the applied, workplace-ready skills that employers need, as evidence of a skills mismatch is already emerging.

Figure 14. Share of organisations surveyed that identify the technology trend as likely to drive business transformation



Source: World Economic Forum Future of Jobs Report 2025

Also vital is the need to address the growing disconnect between what is taught and what is valued by the labour market. As the QS World Future Index notes, China's lowest performing indicator is its Skills Fit which reiterates the mismatch between graduate capabilities and evolving workforce needs. Unless significant action is taken, these skills shortages are likely to exacerbate the obstacles facing industry in making the necessary adjustments to future-proof their businesses. Universities must respond in kind by honing their focus on job-ready skills, embedding applied learning and employer-led thinking into their programmes and curricula design. Central to this should be a focus on strengthening digital workforce readiness and in fostering cross-disciplinary digital fluency.

International students have the potential to play a critical role in filling short-term, high impact skills gaps within the Chinese economy. It will be vital that institutions are able to continue to attract international talent by leveraging their own strengths and world-leading expertise. However, the newly launched 'K visa' from the Chinese government to attract young science and technology professionals prompted a significant backlash on social media. This suggests, there are significant challenges in demonstrating the value of international students and their ability to maintain economic growth in China. One way to counter this is to ensure that education and industry can focus on future-facing skills through the development of innovative, new courses. By aligning curricula with industry needs, Chinese higher education can become an engine that creates skills-ready graduates who can help drive economic growth.

Chinese universities can respond to this shifting economic landscape by building employability into their educational offerings and ensuring graduate outcomes form a central pillar of their recruitment strategies. Information on work placements and links to industry are one of the most desired marketing communication topics for prospective students looking to study in China, as shown in the QS International Student Survey. This reiterates the pre-existing demand from students for a focus on employability. Furthermore, this focus on employability is significantly heightened for East Asian candidates – a region which will be critical in determining future inbound student flows to China and reiterates the need for universities to pivot their recruitment strategies.

China's education system plays a central role in powering the country's economic growth, however an ageing population poses a risk to its productivity and position in the global economy. It is vital that universities are aligned with industry priorities, especially in entrepreneurship and digital upskilling. Without this alignment, China risks underutilising its talent pipeline and missing opportunities for long-term innovation-led growth.

International student trends

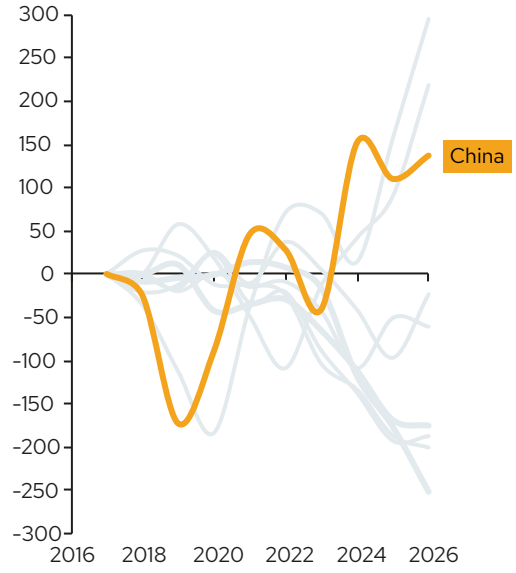
Institutional reputation is a key factor for students

Reputation is an increasingly important priority for students when making decisions about their studies. While students look to reputation to gauge a variety of aspects about their potential study destinations, institutions need to develop ways to communicate the strength of their own reputation in ways that students can interpret and internalise for themselves. Amid these shifting dynamics, it is encouraging to see the reputation of Chinese institutions has remained remarkably stable in recent years. This is also at a time when several countries with well-established higher education sectors, such as the UK, US and Canada have seen their Academic Reputation decline.

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

The picture is even more positive amongst graduate employers, where the reputation of Chinese institutions has made significant progress in recent years, also at a time when the reputation of institutions in established, highly developed countries has declined (Figure 15).

Figure 15. Change in median employer reputation rank since 2017



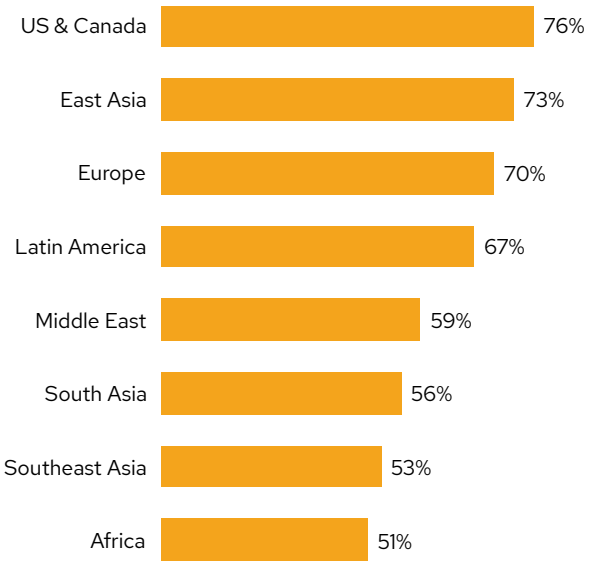
Source: QS World University Rankings

Whilst reputation is an important priority for over half of those looking to study in China, this factor is especially important to candidates from within East Asia, with over 70% of those prioritising it. Given the importance of this region in determining future inbound student flows to China, this presents Chinese institutions with a significant opportunity to benefit from their burgeoning reputation (Figure 16).

Furthermore, when deciding which course to study, whether their course leads to their chosen career is one of the top three priorities for students looking to study in China. This presents a further opportunity for Chinese institutions that have elevated their reputation amongst employers and can demonstrate positive graduate outcomes. Their potential to benefit from shifting patterns of global student flows is immense and their enhanced reputation provides a strong platform with which to do this.

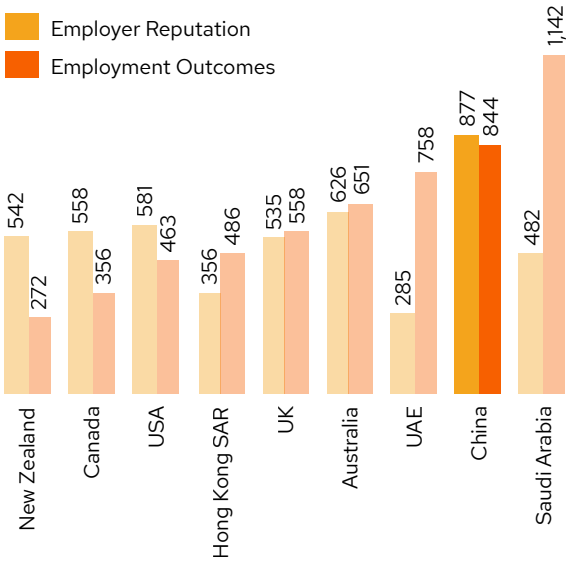
The reputation of institutions among employers is something which can be significantly influenced by the outcomes of its graduates (Figure 17).

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



Source: QS Global Student Flows, October 2025

Figure 17. Average Employer Reputation rank vs Average Employment Outcomes rank



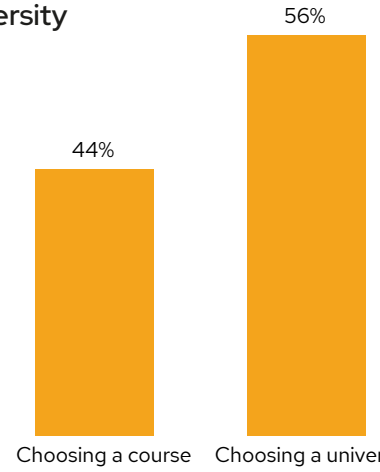
Source: QS World University Rankings 2026

Whilst the reputation of Chinese institutions amongst employers has shown positive movements in recent years, the same cannot be said for the outcomes of their graduates. Amongst the top universities in China, there is a significant discrepancy between employer reputation and graduate outcomes with institutions unable to deliver the outcomes that merit such a strong reputation. Institutions need to make graduate employability a core component of their curricula design, ensuring that graduates have the appropriate mix of skills to meet the existing and future demands of local employers. In doing so, institutions can transform their capacity to become drivers of economic growth and provide a strong foundation for their reputation amongst employers.

Focusing on graduate outcomes will be critical to maintaining Employer Reputation, which in turn will sustain the ability of institutions to benefit from inbound international student flows. Institutional recruitment strategies will have to pivot in order to incorporate compelling, quantifiable and data-driven narratives which speak to the priorities of prospective students. According to the QS International Student Survey, 56% of prospective students looking to study in China will prioritise either subject reputation or overall institutional reputation when choosing a university (Figure 18).

Communicating the strength of their reputation through performance in independent rankings can be an effective way for institutions to demonstrate their credibility to students. Some 71% of students say that good performance in rankings is indicative of a good reputation, and only 11% of students looking to China will prioritise an institution's rank without also prioritising reputation. A further 59% of students will also use a university's rank to gauge the level of teaching quality at an institution.

Figure 18. Importance of reputation to students when choosing a course and university



Source: QS Global Student Flows, October 2025

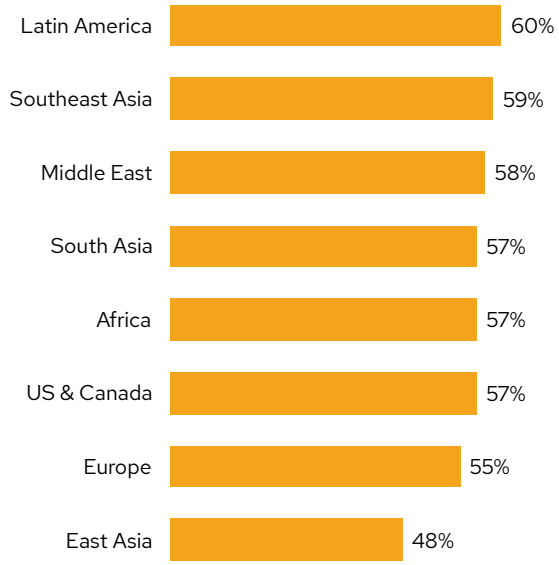
Employability is a vital consideration

Graduate employability is another topic of significant importance to students. When choosing which course to study, just under half will prioritise their career path. Furthermore, one of the most desired marketing communication topics for students is information on work placements and links to industry which reiterates the necessity for institutions to incorporate employability into their recruitment strategies.

Finally, the ability to learn new skills is the most important career consideration for candidates. It's clear that prospective students see their time at university as the best opportunity to upskill, making it vital for institutions to educate their students on how to articulate their skills development and how they can add value to potential employers. This factor takes on additional prominence to candidates from Southeast Asia, another region which will play an important role in determining international student numbers to China (Figure 19).

For institutions in China to gain market share from established international student destinations, employability and graduate skill sets will have to be as much of a priority for institutions as they are for students.

Figure 19. Career considerations when choosing a course
% of students selecting "It allows me to learn new skills"



Source: QS Global Student Flows, October 2025

Strategic imperatives for 2030

This report urges leaders of higher education institutions in China to fully analyse the factors that are likely to influence global student flows. As national policy continues to encourage international recruitment, universities need to plan for a range of scenarios in order to be agile and adaptable in an unpredictable global environment.

Equip graduates with the skills employers need

The Talent Race Rebound scenario imagines a situation where the use of international education pivots from a soft power benefit to employment as a vital pipeline for skilled migration. Given the announcement of China's new K visa, which aims to attract STEM specialists, international graduates could become a key factor in closing the skills gaps within China. Whether this scenario pans out or not, employers in both China and the rest of the world are seeking to hire graduates with the prerequisite skills to allow their organisations to achieve their missions. Ensuring students graduate with these abilities is paramount for universities.

Exploit supportive policies while global competitors struggle

If our Regulated Regionalism scenario manifests, China will be better placed than universities in other countries to attract international students through its generous scholarship programmes. The Belt and Road Initiative has given China a competitive advantage in key growth areas in Asia and Africa, which will likely offer a range of long-term benefits for students across the globe, for China's higher education ecosystem, as well as wider society. Institutions in the country must ensure they maintain and grow their presence in the countries that this report highlights as key growth areas, such as Nigeria, Ghana, Thailand and Pakistan.

Grow reputation further

However, whatever shape the market takes in the latter half of the 2020s, reputation is going to be a significant driver of student flows globally. While China's relatively affordable opportunities and scholarships are attractive, prospective international students are still seeking return on investment and good career outcomes from their tertiary education. A majority of students cite the importance of reputation when making study decisions, so, for Chinese institutions, building and maintaining international brand awareness and reputation is vital.

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 & 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 considers the destination's inclusivity and the presence of established diaspora communities.

Disruption factors: Drivers of volatility and alternative mobility scenarios

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

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

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

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

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

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

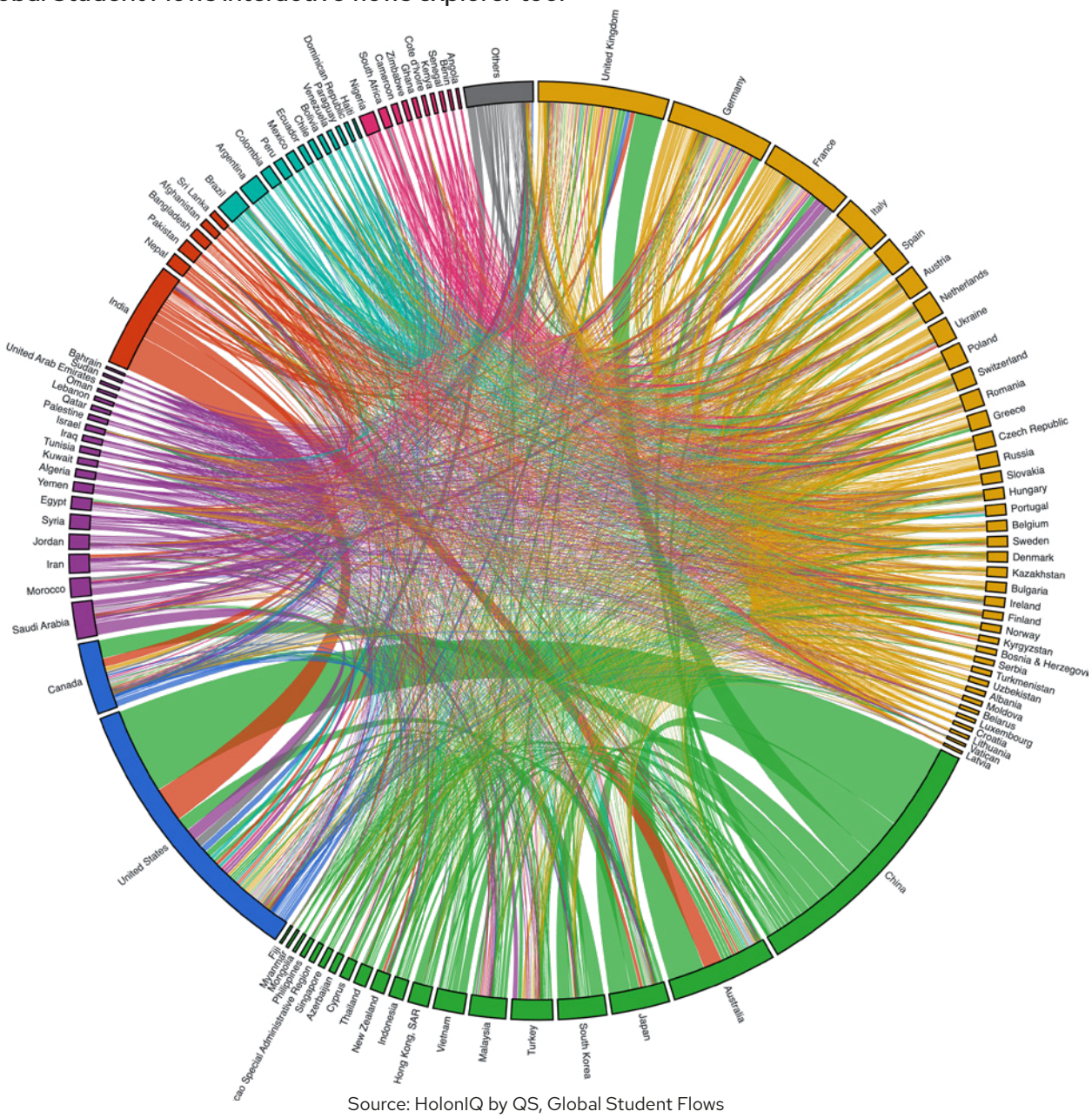
Mapping flows

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

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

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

Global Student Flows interactive flows explorer tool



Source: HolonIQ by QS, Global Student Flows

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

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

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

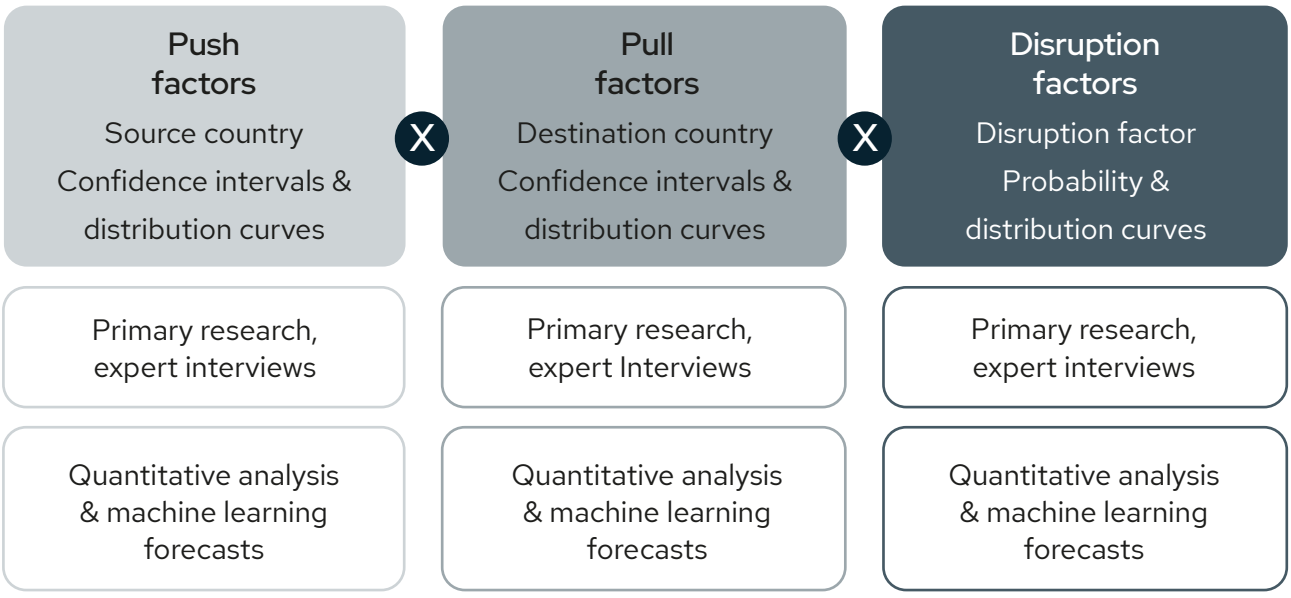
Each factor is associated with a statistical distribution and confidence interval derived from a combination of primary expert interviews and historical quantitative data. Push and pull factors each generate growth rate distributions for every source and destination country respectively, while disruption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

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

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

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

Global Student Flows, open-source framework



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 families 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.

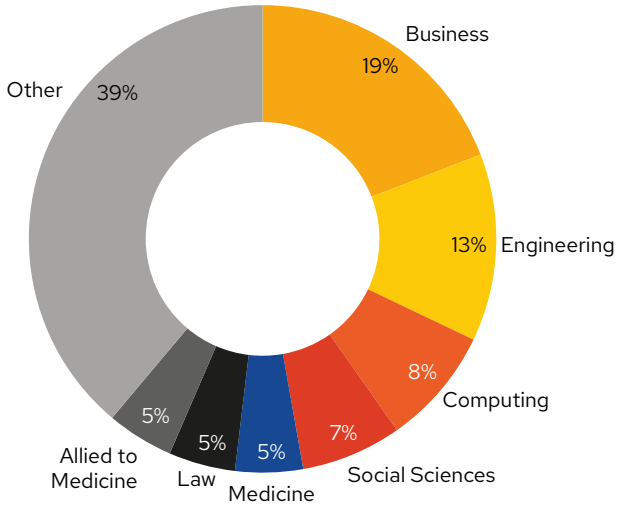
The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 146 universities globally, who were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

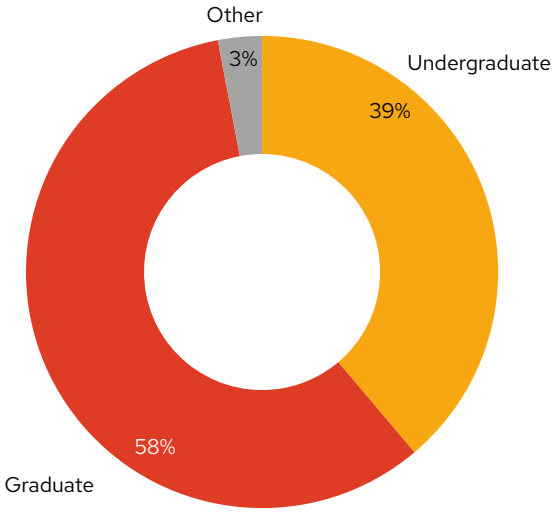
The 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution that took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey respondent demographics

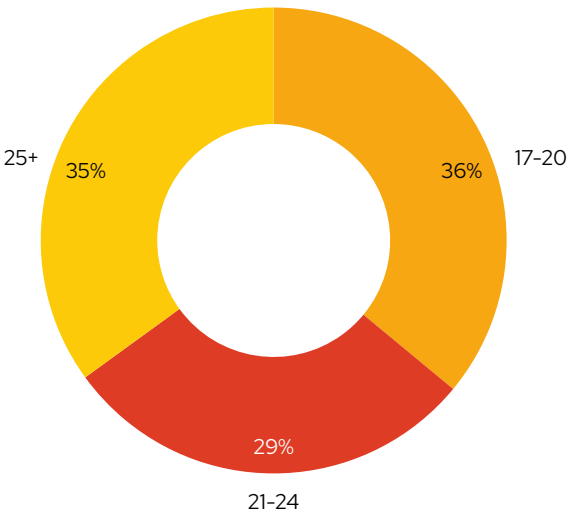
Subject preference



Study level



Age



Source: QS Global Student Flows, 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 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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