Student mobility and motivation: India

Outbound student perceptions

Powered by the QS International Student Survey and Global Student Flows

2026

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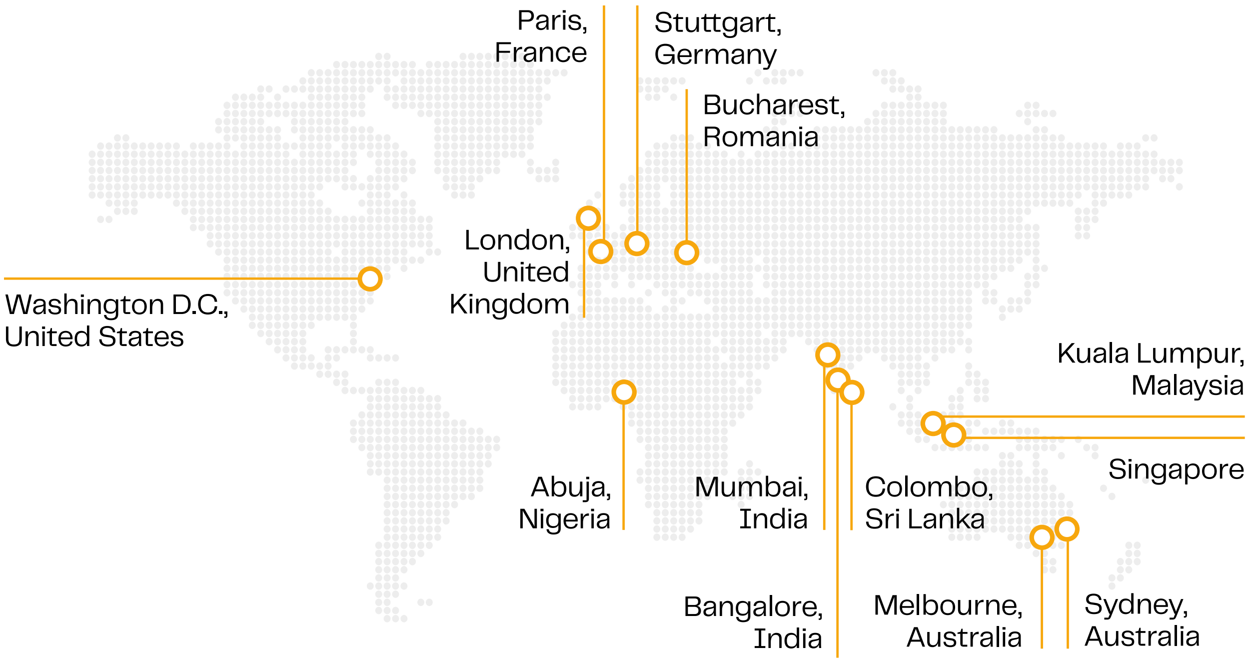

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Foreword

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India continues to shape the global student mobility landscape. As one of the world's largest source markets, its influence extends beyond enrolment numbers to the priorities, expectations and behaviours that increasingly define international recruitment.

The findings in this report suggest Indian students are placing greater emphasis on quality, reputation, student welcome and the overall study experience, while navigating an increasingly complex decision journey. University websites remain central, but students are drawing on a growing mix of rankings, agents, social media and peer validation before making a choice. Expectations around institutional responsiveness are high, but still rising.

Recruiting more Indian students will require a compelling proposition that combines academic quality, student experience and clear communication throughout the recruitment journey.

Turn insights into recruitment results

Find, engage and recruit more of your ideal students

How we can help:

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

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universities worldwide trust us to grow and diversify their student cohorts

14,000+
compliance checks delivered over the past five years

50,000+
students engaged through QS recruitment events

Discover what's possible with QS

Explore our student recruitment solutions

Executive summary

Indian students remain strongly motivated by academic quality and reputation, but the factors shaping destination choice are evolving. In 2026, a welcoming environment and high-quality teaching are the joint-leading drivers of destination appeal, while the importance of employability, post-study work opportunities and affordability has diminished since 2022. At the same time, lifestyle, networking opportunities and overall student experience are becoming more influential.

Demand remains concentrated in Business and Management, Engineering and Technology, and Computing, but the strongest growth is in health-related disciplines. Interest in Subjects Allied to Medicine has more than doubled since 2022, highlighting changing patterns of demand within the Indian market.

The student research journey is increasingly multi-channel. University websites remain the most influential source of information, but the growing role of education agents and social media means institutions must deliver consistent messaging across a broader range of touchpoints. Meanwhile, expectations around response times continue to tighten, particularly during the admissions process, making speed and personalisation an increasingly important part of conversion strategy.

India: Market overview

With one of the world's largest youth populations and a growing demand for global education, Indian student flows continue to shape the international mobility landscape. As of 2024, over 800,000 Indian students study in higher education institutions overseas, with traditional Anglophone destinations attracting a majority of flows. India remains the top source of foreign enrolments in the US, UK, and Canada. However, in recent years, these major education hubs have restricted inbound numbers through stricter visa requirements and policy reforms, diverting immigration pathways and redirecting interest towards more welcoming destinations.

- Indian student flows to the 'Big Four' are forecasted to decline at an average of 0.5% through 2030.
- Outbound student mobility from India grew at an average rate of 11% from 2022 to 2025.
- Policy changes and increased challenges in traditional destinations have redirected interest toward countries like Germany, the UAE, and France.
- As transnational education in India expands, mobility may shift again, with students studying at international branch campuses.

Figure 1. Top 20 source countries to India, 2024-2030F

Country	2025 Rank	2025 Flow	2030 Rank	2030 Flow	2024 - 2030 CAGR	Lower to Upper Confidence Interval - CAGR Spread	
United Kingdom	3	147K	1 ▲	184K	4.7%	-6%	12%
Canada	1	233K	2 ▼	176K	-5.8%	-12%	4%
United States	2	219K	3 ▼	163K	-5.4%	-7%	5%
Germany	5	59K	4 ▲	113K	14%	-4%	20%
Australia	4	104K	5 ▼	110K	1.1%	-5%	6%
Russia	6	39K	6	46K	3.5%	-6%	10%
Georgia	7	20K	7	23K	2.30%	-5%	6%
United Arab Emirates	8	13K	8	22K	11.7%	-6%	18%
France	10	9K	9 ▲	19K	16.2%	-3%	22%
Ireland	9	9K	10 ▼	16K	11.7%	-8%	18%
China	11	9K	11	10K	1.7%	-5%	7%
Italy	12	5K	12	7K	5.60%	-3%	9%
New Zealand	13	4K	13	6K	8.4%	-3%	13%
Malaysia	15	4K	14 ▲	5K	7.4%	-4%	12%
Netherlands	14	4K	15 ▼	4K	1.1%	-5%	5%
Singapore	17	3K	16 ▲	4K	5.6%	-2%	10%
Taiwan	16	3K	17 ▼	4K	4.3%	-3%	8%
Poland	17	3K	18 ▼	4K	0.7%	-7%	6%
South Korea	20	2K	19 ▲	4K	6.7%	-2%	10%
Ukraine	19	2K	20 ▼	3K	2.4%	-6%	7%

-15% -10% -5% 0% 5% 10% 15% 20% 25%

Source: QS Global Student Flows

Read more in Global Student Flows: India

Outbound trends

At a glance

900,000+

Indian students projected to study abroad by 2030

Top destinations

What do they want to study?

Top subjects in 2026

#1

Business & Management 24%

#2 Engineering & Technology 17%

#3 Computing 12%

#4 Subjects allied to Medicine 9%

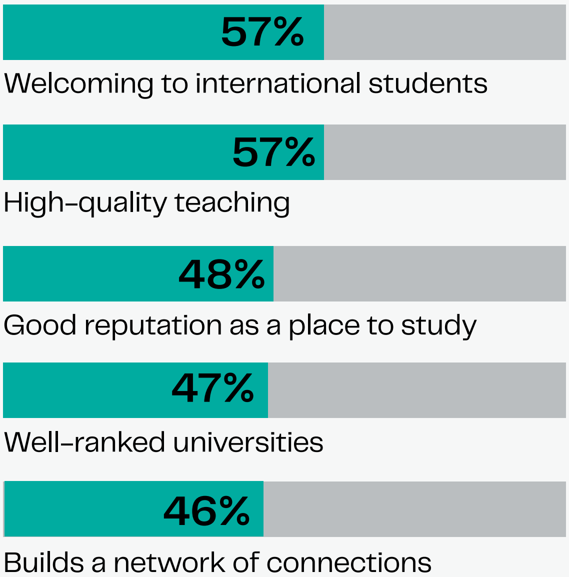
#5 Medicine & Dentistry 6%

Biggest changes since 2022

- ▲ Subjects allied to Medicine +5%
- ▲ Medicine & Dentistry +2%
- ▲ Creative Arts & Design +2%
- ▼ Engineering & Technology –7%
- ▼ Computing –4%

What do Indian students seeking international study want?

Top decision drivers in 2026
when choosing a country



Fastest-rising factors since 2022

- Welcoming to international students +5%
- Culture / lifestyle appeals +5%
- Recommended to me +3%
- Graduate employment options -11%
- Post-study work visa access -11%

Most influential information sources

74% Official university website

56% General online search

54% Rankings

39% Institution information sessions / university fairs

37% Social media channels

34% Education agents

Biggest shifts since 2022

- Education agents +11%
- Social media channels +9%
- Advertisements +3%
- Rankings -7%
- Course-finder websites -5%

How quick do students expect responses?

26% expect a complete and personal enquiry response within 24 hours

63% expect an enquiry response within three days or less

18% expect an application outcome within 24 hours

65% expect an application outcome within one week or less

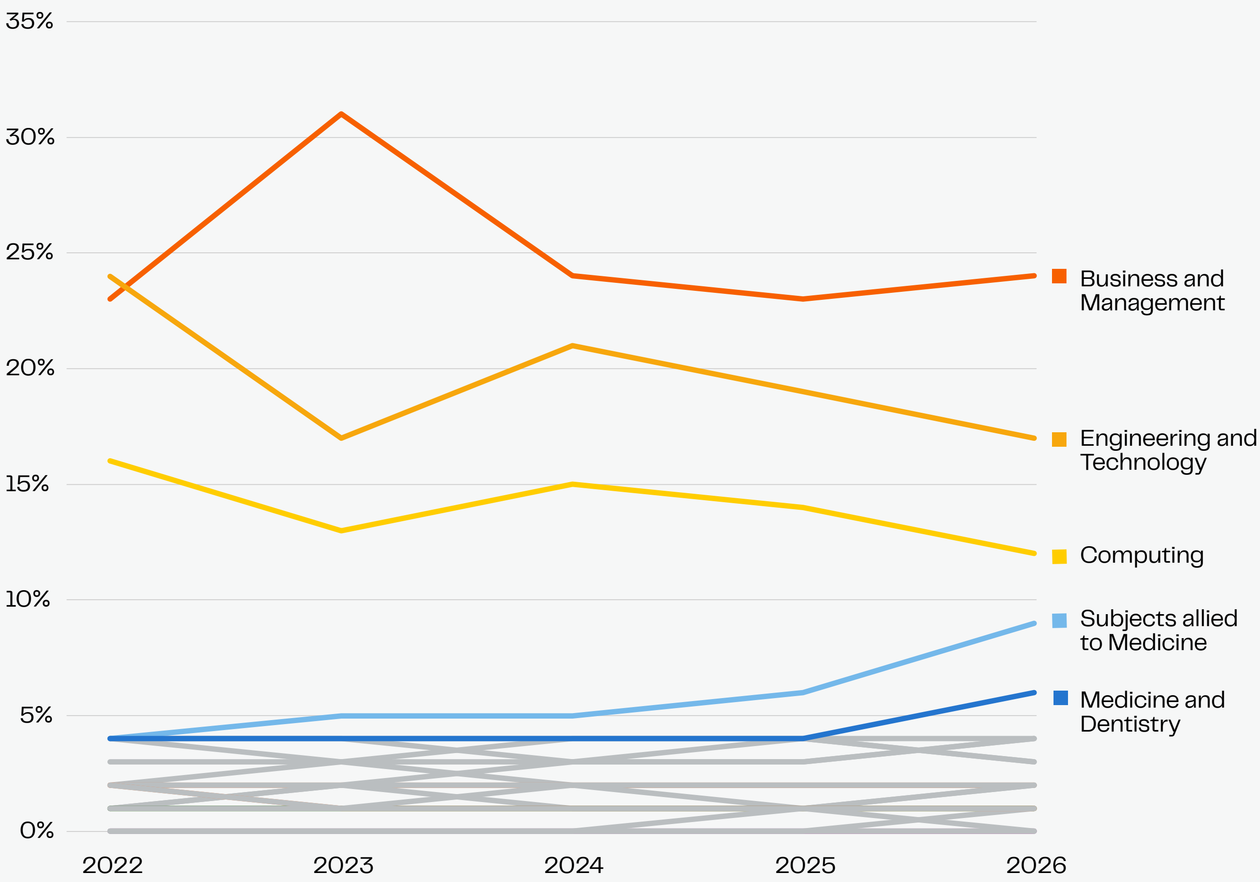
Only **35%** expect to wait longer than one week for an application outcome

Subject-level interest

Business and Management remains the largest subject area among prospective Indian students, accounting for 24% of interest in 2026. Its share has fluctuated across the period, rising sharply to 31% in 2023 before returning to a more stable level of 23–24% from 2024 onwards.

Engineering and Technology and Computing continue to attract substantial demand, but both have lost share since 2022. Engineering and Technology has fallen from 24% in 2022 to 17% in 2026, while Computing has declined from 16% to 12%. These remain high-volume subject areas, but the downward movement points to a more selective and competitive environment for STEM recruitment. Clear differentiators, particularly around employability or location-led value propositions, are necessary to retain market share.

Figure 2. India outbound mobility: What do Indian students want to study abroad?



Source: QS International Student Survey

The clearest growth is in health-related study. Subjects allied to Medicine has more than doubled its share, rising from 4% in 2022 to 9% in 2026, while Medicine and Dentistry has increased from 4% to 6%. Creative Arts and Design has also edged up from 2% to 4%. Most other subject areas remain comparatively stable at low levels.

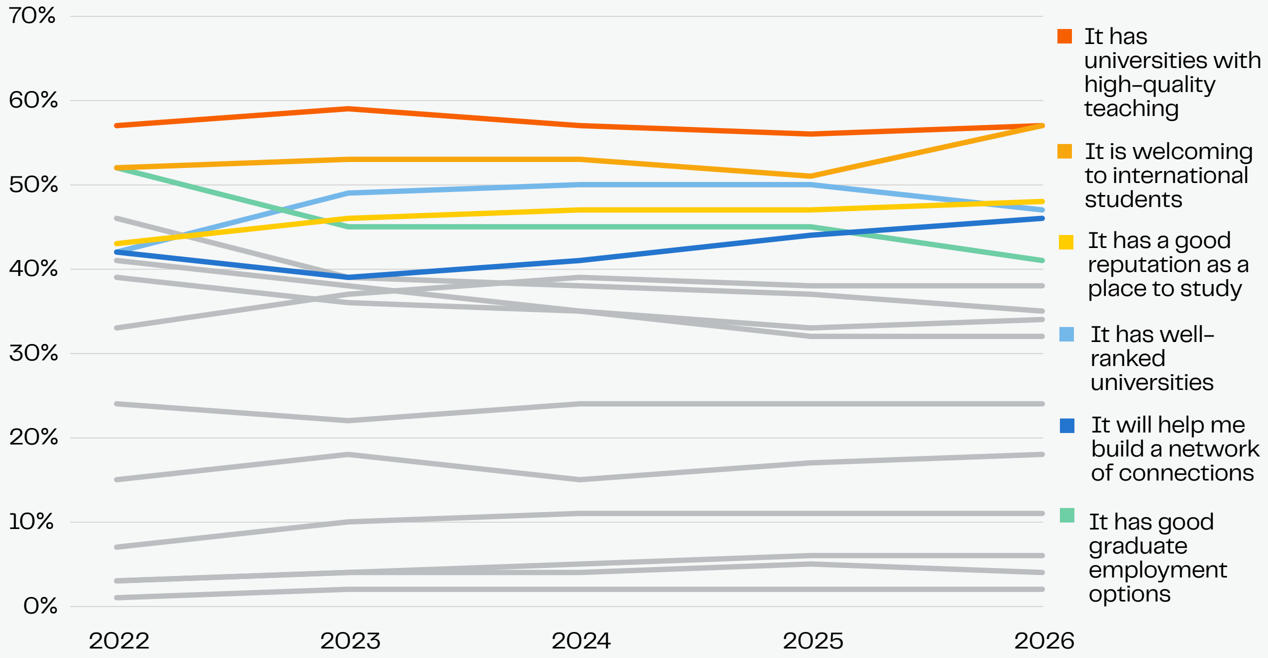
The overall picture is not a wholesale shift away from traditional high-demand disciplines, but a gradual broadening of interest.

Key questions to consider:

- How differentiated is your Business and Management offer in a market where demand remains high but contested?
- Are your STEM recruitment campaigns doing enough to connect programmes to employability, specialisms and location-specific career outcomes?
- Where can health-related programmes be given greater prominence?
- Which smaller or emerging subject areas, such as Creative Arts and Design, offer opportunities for more targeted recruitment rather than broad-based awareness activity?

What drives outbound mobility?

Figure 3. India outbound mobillity: Important factors when choosing a country



Source: QS International Student Survey

The strongest pull factors for Indian students looking to study abroad centre on academic confidence, reputation and a sense of welcome. In 2026, 57% of prospective students selected “welcoming to international students” and 57% selected “high-quality teaching”, making these the joint-leading drivers. Reputation remains highly influential: 48% point to a destination’s reputation as a place to study, while 47% cite well-ranked universities.

Practical and outcomes-led motivations remain important, but they have weakened since 2022. Good graduate employment options have fallen from 52% to 41%, while post-study work visa access has declined from 46% to 35%. The decline coincides with a period in which several major destinations have changed, or signalled changes to, post-study work rights and wider international student policy. Affordability has also become a less prominent driver, with affordable cost of living falling from 39% to 32% and affordable cost of studying declining from 41% to 34%.

At the same time, softer destination attributes are gaining ground. Cultural and lifestyle appeal has increased from 33% to 38%, while the share selecting “it will help me build a network of connections” has risen from 42% to 46%. Recommendations and friends or family remain lower-ranked, but both have grown modestly since 2022.

Indian students are not disregarding employment, visas or affordability, but these factors appear to be sitting alongside a stronger emphasis on quality, welcome, lifestyle and networks. For institutions, the opportunity is to present international study not only as a route to post-study outcomes, but as a broader experience that builds confidence, connection and long-term value.

Key questions to consider:

- How clearly does your destination messaging combine teaching quality, institutional reputation and international student welcome?
- Where do you need to rebuild confidence around employability, post-study work and graduate outcomes without relying only on visa or policy messaging?
- Are student experience, lifestyle and networking benefits visible enough across recruitment campaigns, web content, alumni stories and offer-holder communications?

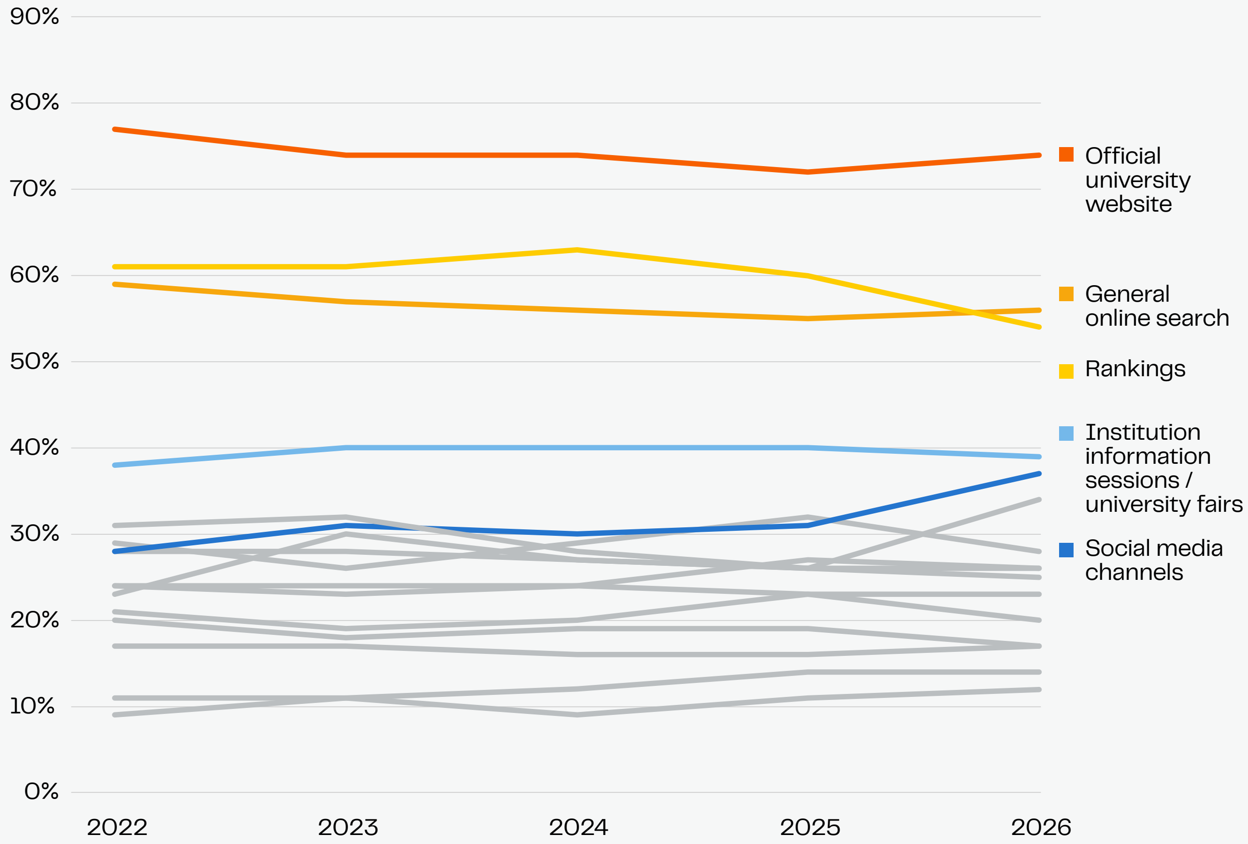
The sources of information students use to make decisions

Indian students continue to rely most heavily on institution-owned and search-led channels when researching study options. In 2026, the official university website remains the leading information source, used by 74% of prospective students, followed by general online search at 56%. Rankings also remain highly influential at 54%, although their use has fallen from 61% in 2022 and from a peak of 63% in 2024.

The fastest-growing sources point to a more advisory and socially mediated decision journey. Education agents have risen from 23% in 2022 to 34% in 2026, making them the sixth most-used source overall. Social media channels have also grown strongly, from 28% to 37%, while advertisements have increased modestly from 9% to 12%. This suggests students are not only seeking factual information, but also looking for reassurance, interpretation and peer-style evidence across a wider mix of touchpoints.

The overall picture is a multi-channel research journey in which university websites remain critical, but must be supported by visibility in search, credible rankings narratives, social media content, agent engagement and consistent in-person or virtual recruitment messaging.

Figure 4. India outbound mobility: Information sources



Source: QS International Student Survey

Key questions to consider:

- Is your official website structured to answer the questions Indian students are most likely to ask before they contact admissions or an agent?
- How visible and persuasive is your institution across search, rankings narratives and third-party discovery points where students validate their choices?
- Are education agents, consultants and admissions teams equipped with consistent, up-to-date messages about programmes, costs, outcomes and student support?
- How effectively are social media channels being used to provide reassurance, student proof points and practical guidance rather than only campaign visibility?

Student conversion and communication

Indian students expect universities to respond quickly and personally throughout their journey. In 2026, 26% expect a complete and personal response to an enquiry within 24 hours, up slightly from 24% in 2022. A further 37% expect a response within three days, meaning nearly two-thirds of prospective students expect institutions to provide a tailored reply within 72 hours.

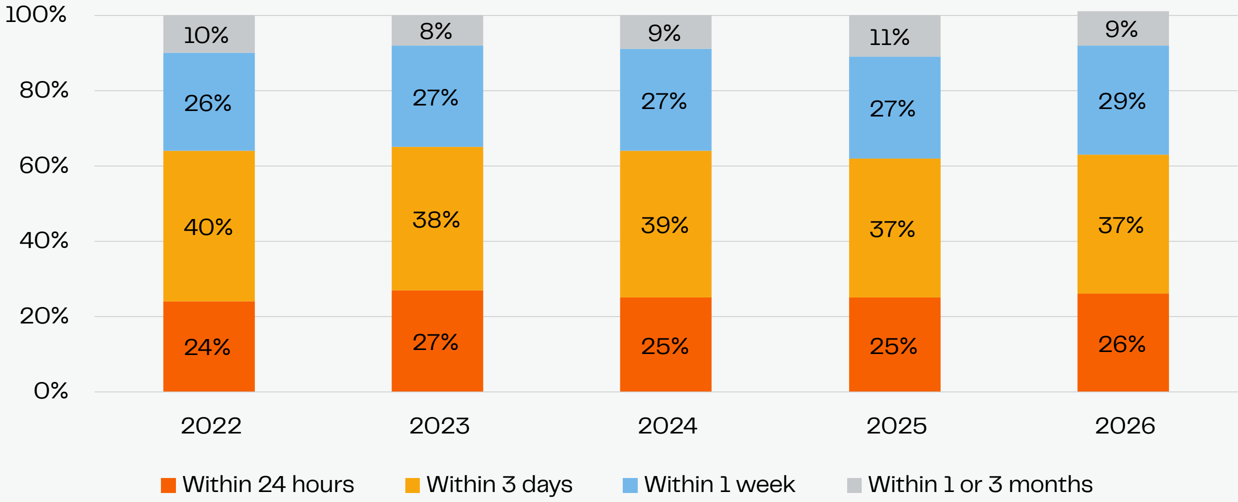
Expectations are also tightening at the application-outcome stage. The share expecting to receive a decision within 24 hours has increased from 13% in 2022 to 18% in 2026, while those expecting an outcome within three days has risen from 15% to 19%. Overall, 65% of Indian applicants now expect an application outcome within one week or less, compared with 53% in 2022. At the same time, the proportion willing to wait up to one month has fallen from 38% to 26%.

Speed is a core part of the conversion experience. Slow or generic responses risk weakening confidence at precisely the point when students are comparing institutions, weighing destinations and looking for reassurance. The expectation is not only for faster communication, but for communication that feels complete, personal and coordinated across enquiry handling, admissions review and application follow-up.

Key questions to consider:

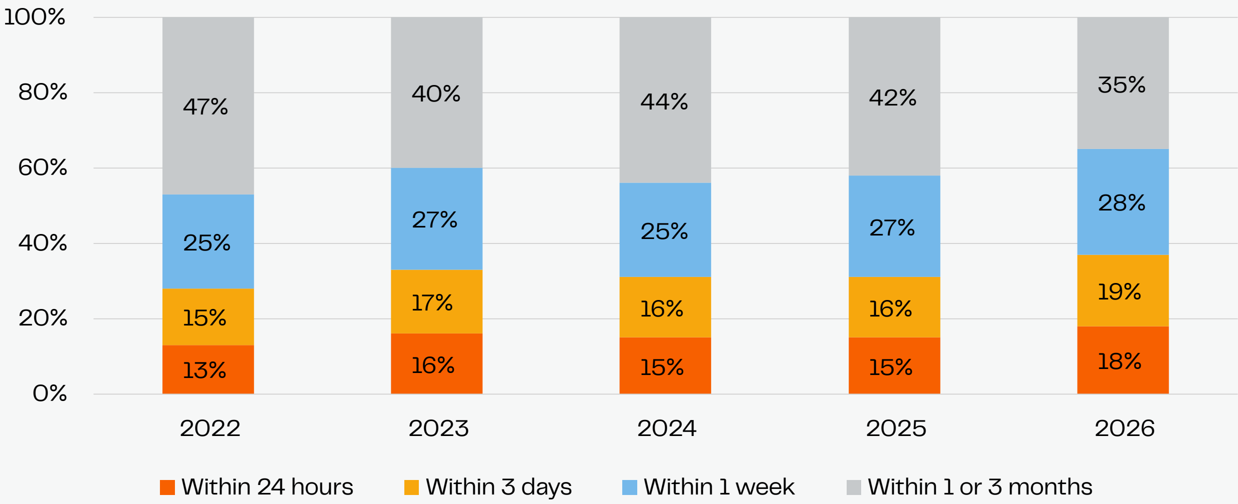
- Can enquiry response processes consistently deliver a complete, personal reply within 24 to 72 hours, especially during peak recruitment periods?
- Where can application-review workflows be accelerated without compromising decision quality, compliance or applicant confidence?
- Are automated acknowledgements, CRM workflows and staff responses working together to keep students informed while they wait for a full answer or outcome?
- How are response-time expectations being managed across admissions, recruitment, agents and international teams so students receive a coherent experience from enquiry to decision?

Figure 5. India outbound mobility: Expectation of time to receive a complete and personal enquiry response



Source: QS International Student Survey

Figure 6. India outbound mobility: Expectation of time to receive the outcome of their application



Source: QS International Student Survey

Methodology

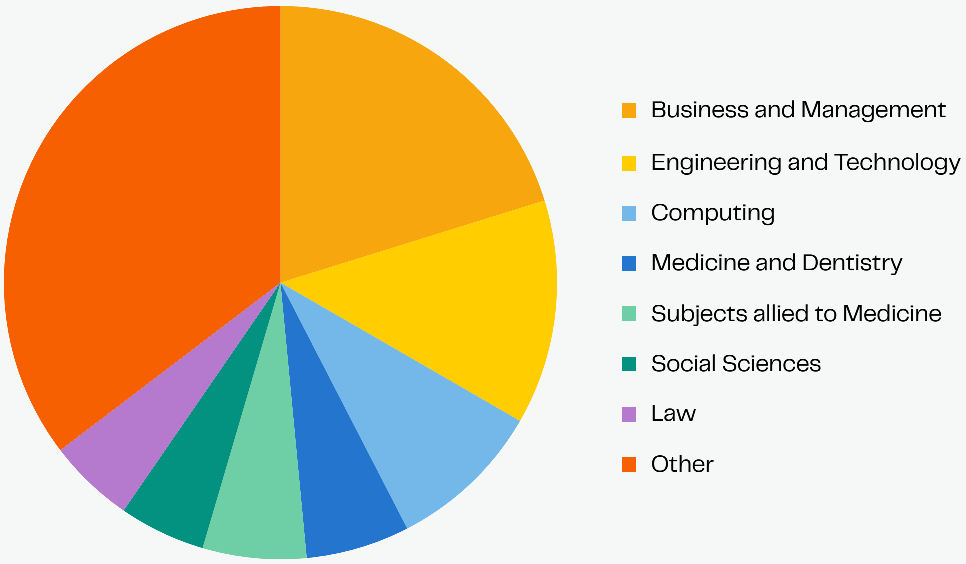
The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2026 iteration draws on responses from over 42,115 students in 191 locations, and this report uses over 500,000 responses from the past five years.

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

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

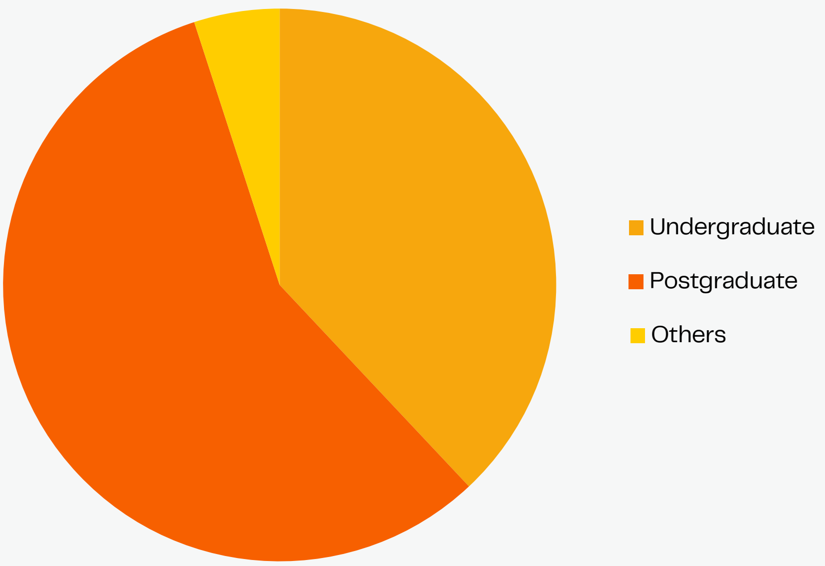
International Student Survey respondent demographics

Subject preference



Source: QS International Student Survey

Study level



Source: QS International Student Survey

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