



Student mobility
and motivation:

United Kingdom

Inbound student
perceptions

Powered by the QS International Student
Survey and Global Student Flows

2026

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Foreword



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The UK remains one of the world's most recognised and attractive study destinations. Its universities continue to draw students through academic quality, global reputation and strong career outcomes. But the recruitment environment is shifting, with student choice becoming more complex, competition intensifying, and institutions under growing pressure to prove value earlier in the decision-making journey.

QS Global Student Flows forecasts UK international enrolments to grow by around 3.5% annually to 2030, the strongest projected rate among the traditional 'Big Four' destinations. That is a positive signal, but not a guarantee. Growth will depend on how well institutions respond to changing source-market demand, affordability concerns, policy uncertainty and the rise of high-quality alternatives across Europe, Asia and the Middle East.

Students are also comparing more options and expecting faster, more relevant communication. Half of prospective students are considering five or more universities, while cost, employability, visa pathways and responsiveness all play a stronger role in shaping decisions. Reputation still matters, but it is no longer enough on its own. Institutions need to show why the UK, why their university and why now.

These are challenging times for UK higher education, but also a moment to act with sharper insight and clearer strategy. This report brings together mobility forecasts and student preference data to help institutions understand where demand is heading, what students value and how to compete more effectively. At QS, we help universities turn evidence into action, strengthen recruitment strategies and connect with the right students in the right ways. If you would like to find out more, please contact us.



Turn insights into recruitment results

Find, engage and recruit more of your ideal students

How we can help:

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

1,500+

universities worldwide trust us to grow and diversify their student cohorts

14,000+

compliance checks delivered over the past five years

50,000+

students engaged through QS recruitment events

Discover what's possible with QS

Explore our student recruitment solutions



UK: Market overview

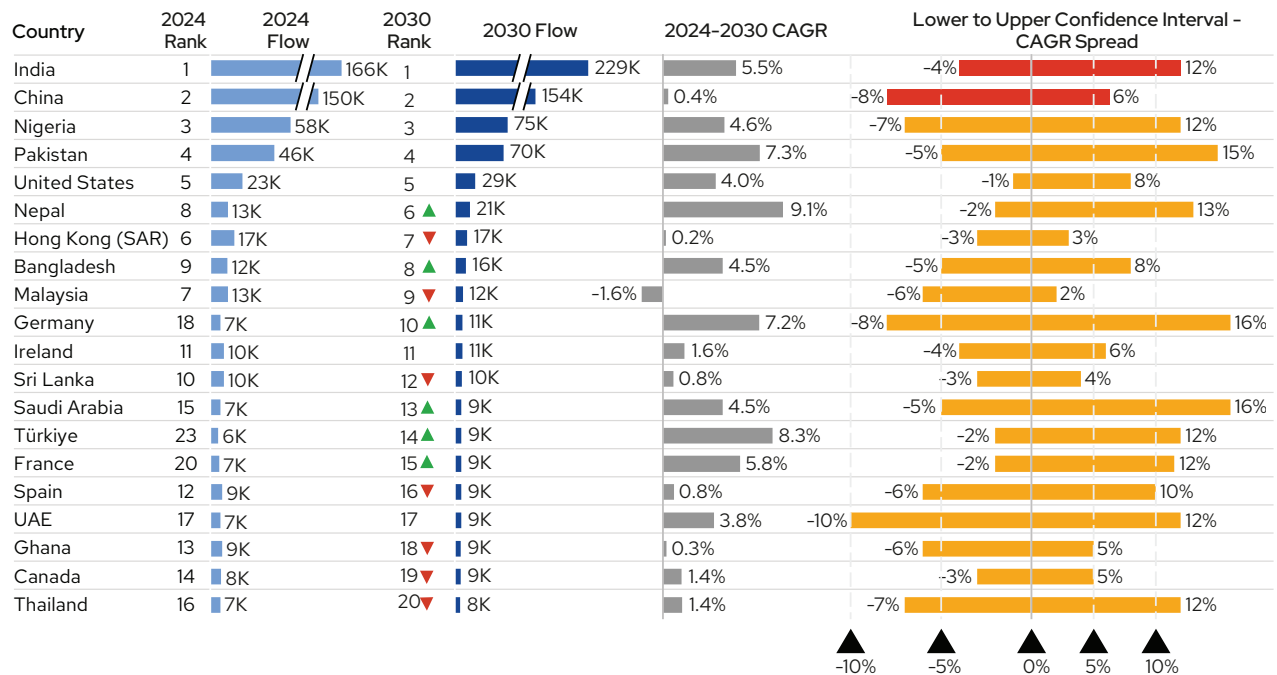
Inbound mobility trends

QS Global Student Flows forecasts that the UK’s international student enrolments will grow by around 3.5% annually, the highest of any ‘Big Four’ destination. This points to continued demand for UK higher education, but it is a more measured outlook than the post-pandemic rebound and sits below the wider European growth trajectory.

Future growth will be shaped by the interaction of source-market demand, policy stability and intensifying global competition. India and China are expected to remain the UK’s largest student source markets, but neither can be treated as a guaranteed growth engine. Indian enrolments are projected to recover, though at a slower pace, while Chinese numbers are expected to remain broadly flat as domestic economic pressures and improving regional study options influence student choices. Stronger demographic momentum is likely to come from parts of Africa and Southeast Asia, where youthful populations, expanding middle classes and rising demand for international qualifications create long-term recruitment potential.

For UK institutions, the opportunity is significant but increasingly contested. Post-study work rights, institutional reputation and the perceived value of a UK qualification remain central to student decision-making, yet policy volatility and the rise of lower-cost, high-quality alternatives in Europe, Asia and the Middle East are placing greater pressure on the UK’s competitive position. Sustained growth will depend on sharper market diversification, clearer employability messaging and a stronger articulation of value for students weighing cost, career outcomes and destination confidence.

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



Source: QS Global Student Flows, October 2025

Read more in Global Student Flows: UK



Executive summary

The UK remains a leading international study destination, but growth can no longer be taken for granted. Global Student Flows forecasts international enrolments to grow by around 3.5% annually to 2030, the strongest outlook among the traditional 'Big Four' destinations. Yet this growth will depend on how well UK institutions respond to changing source-market dynamics, sharper global competition and more value-conscious student decision-making.

The UK's core strengths remain powerful, but they need to be framed around value

Academic prestige remains a major driver for UK-bound students, with 58% citing it as important, while employability is becoming more central to decision-making. Fortunately, one of the UK has a strong association with good job opportunities. However, 30% of prospective students prioritise affordable study costs and 34% prioritise affordable living costs, but 59% see the UK as expensive. The challenge for institutions is not only to promote reputation, but to connect prestige, career outcomes and student experience into a clearer return-on-investment story.

Subject demand is shifting in ways that require more precise positioning

Business and Management remains the leading subject choice for UK-bound students, but interest has softened since its recent peak. Engineering and Technology shows a similar decline after peaking in 2024. These shifts sit alongside weaker relative performance in the QS World University Rankings by Subject, but the relationship between rankings and demand is not straightforward. Law, Subjects allied to Medicine and Creative Arts and Design all show areas of rising interest despite mixed rankings movement. Institutions therefore need a more granular view of subject-level demand, using both rankings and student preference data to decide where to defend established strengths, where to invest, and where to sharpen programme messaging.

Recruitment success will depend on meeting students earlier, faster and through the right channels

Owned channels – such as official university websites and social media – remain the most important channels when students are seeking information, with social media becoming 8% more important since 2022. Agents and consultants are also gaining relevance. At the same time, students increasingly expect a personal response within one day. Institutions need joined-up digital, social and agent engagement, backed by faster and more personalised communication throughout the enquiry and application journey.

Inbound trends

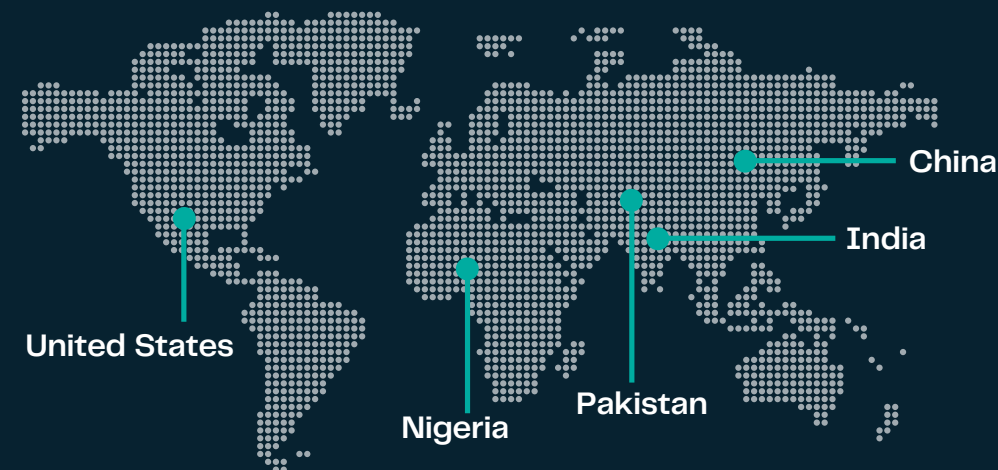
What do UK-bound students want from institutions?



At a glance

Where are UK-bound students coming from?

Top markets by 2030



Growth forecast at around 3.5% annually, the strongest projected rate among the traditional 'Big Four' destinations.

What do they want to study?

Top subjects in 2026

#1

Business & Management

#2 Engineering and Technology

#3 Computing

#4 Subjects allied to Medicine

#5 Creative Arts & Design ▲
(Biggest growth area since 2022.)

Most influential information sources

#1

Official university website

#2 Online search

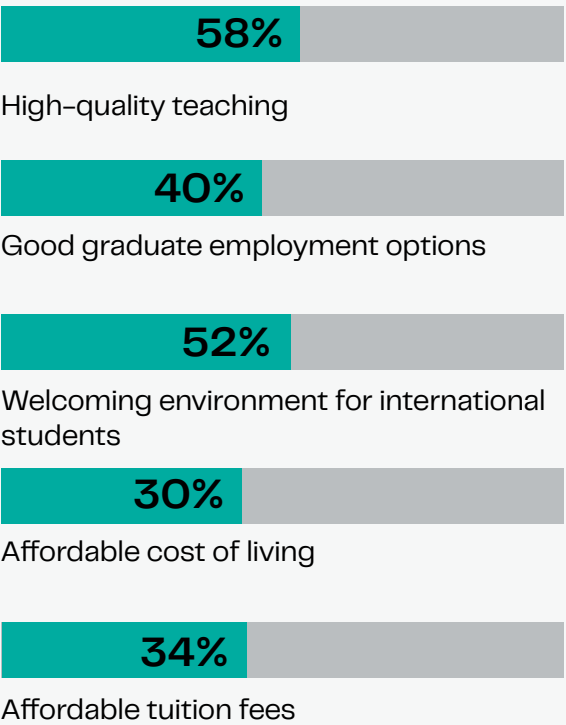
#3 Rankings

#4 Social media

#5 Agents and consultants

What do UK-bound students want?

Top decision drivers in 2026
when choosing a country



Fastest-rising factors since 2022

- ▲ Ability to get a visa after graduating
- ▲ Ability to get a study visa
- ▲ Good graduate employment options
- ▲ Opportunity to build a network of connections

How quick do students expect responses?

Half of prospective students are considering five or more universities

10% are considering more than ten universities

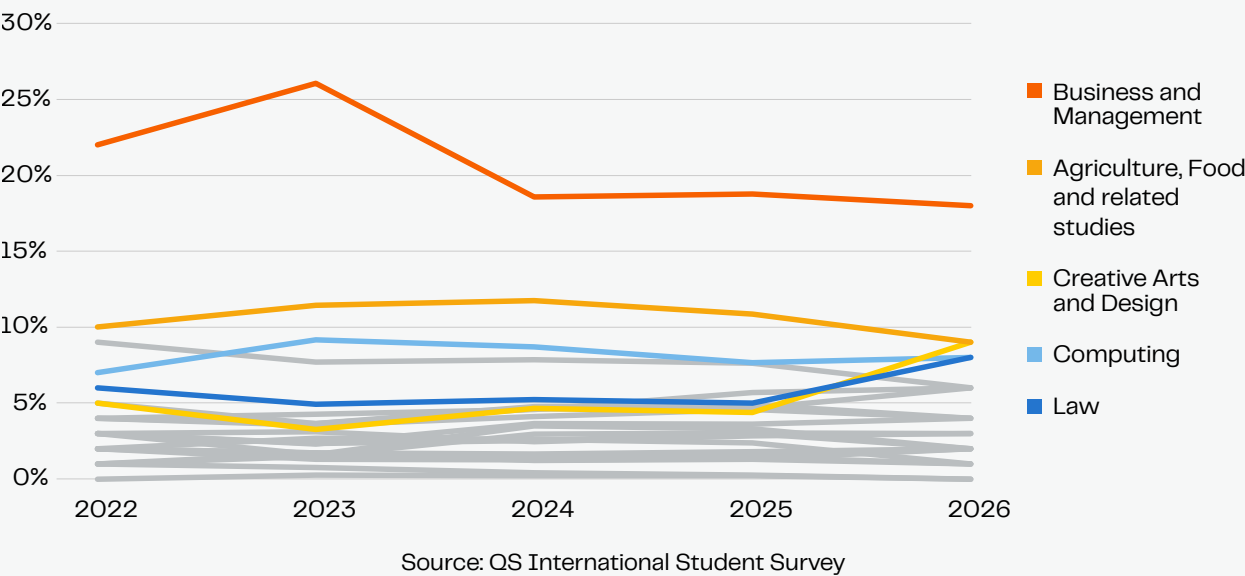
Expectations for a response within one day continue to rise

Fewer students now consider three days an acceptable wait for a personal response

Subject-level interest

Business and Management remains the leading subject choice for UK-bound students, but interest has softened since its recent peak. Engineering and Technology shows a similar pattern: after reaching a high point in 2024, student interest has declined. These shifts sit alongside weaker relative performance in subject rankings. In the QS World University Rankings by Subject, the median rank of UK institutions in Business has fallen by 186 places over the past three years, while Engineering and Technology has declined by 84.5 places over the same period.

Figure 2. What are UK-bound students planning to study?



The relationship between student demand and rankings performance is not uniform across all subjects. Law and Subjects allied to Medicine have both seen increases in student interest despite median rank declines of 99 and 116 places respectively. Creative Arts and Design also stands out: interest has increased by 4% since 2022, while the UK’s median subject ranking has improved by 205 places.

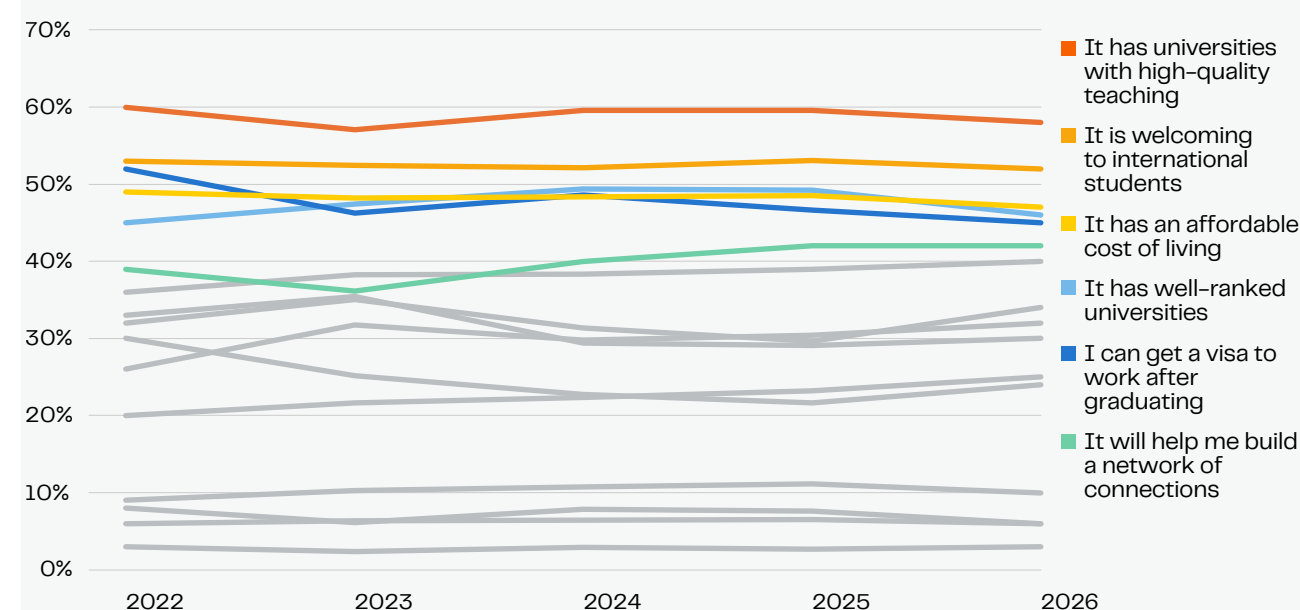
This suggests that subject-level recruitment opportunities cannot be read from demand or rankings data in isolation. For established high-volume subjects, the challenge is to sustain demand while protecting perceptions of quality and career value. For growth areas such as Law, Subjects allied to Medicine and Creative Arts and Design, institutions may have an opportunity to strengthen subject-specific messaging, particularly where student interest is rising despite mixed rankings performance.

Key questions to consider:

- Are you differentiating your messaging on a per-subject basis, and accurately reflecting your strengths?
- Is your programme portfolio aligned to shifting UK-bound student demand?
- Are you using subject-level demand and rankings data to identify strengths and discover growth opportunities?

Factors that drive students to the UK

Figure 3. UK inbound mobility: Important factors when choosing a country



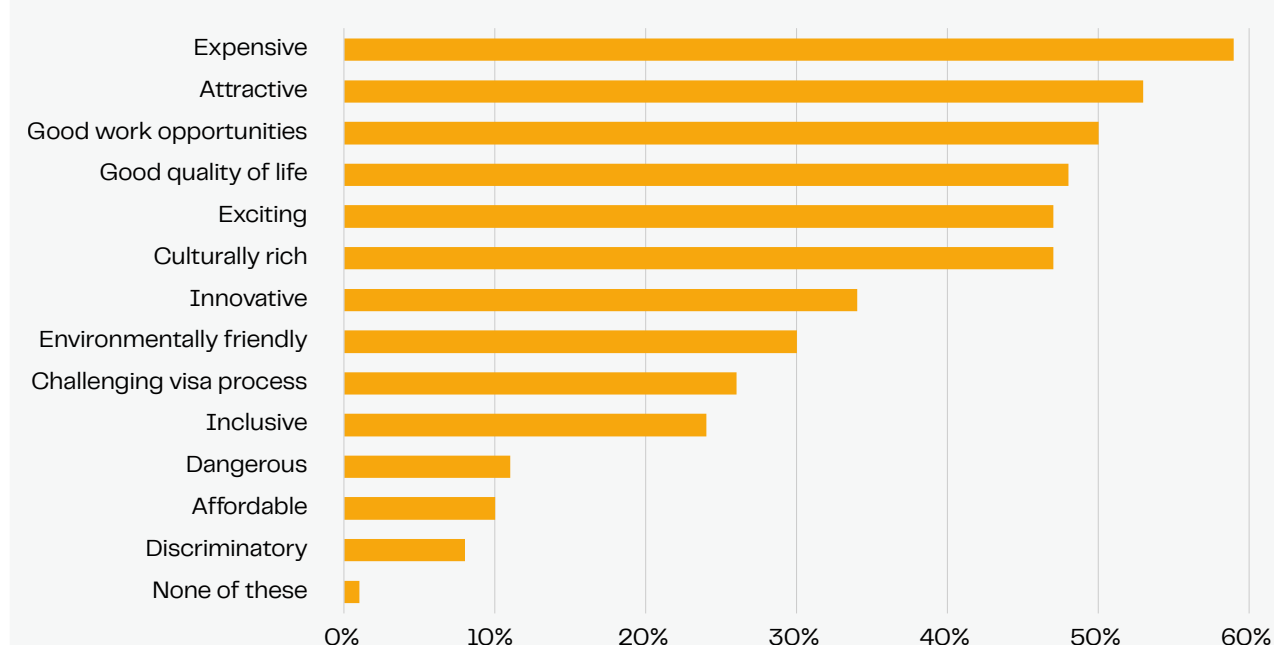
Source: QS International Student Survey

Academic prestige continues to be a major driver for UK-bound students, with 58% citing it as important. A welcoming environment for international students also remains a key consideration, although its importance has remained broadly flat.

Students are placing increasing emphasis on employability. The importance of good graduate employment options has risen by 4% since 2022, with a similar increase in the opportunity to build a network of connections. Visa-related factors are also increasing in importance, with the ability to get a study visa rising by 5%, and the ability to get a visa after graduating rising by 6% since 2022.

How is the UK perceived by students?

Figure 4. International students' perception of the UK



Source: QS International Student Survey

The UK's perception is grounded in the friction between cost and quality. Nearly 60% of international students said that they think the UK is expensive and only 10% said it was affordable, but over 50% said it remained attractive, and nearly as many said it had good work opportunities and a good quality of life.

Given the importance of post-graduate work in driving students to the UK, it's important to ensure the UK's employment proposition remains compelling. As noted previously, visa acquisition is increasingly important when students choose a country, and unfortunately for the UK, 26% see the UK's visa process as challenging.

Key questions to consider:

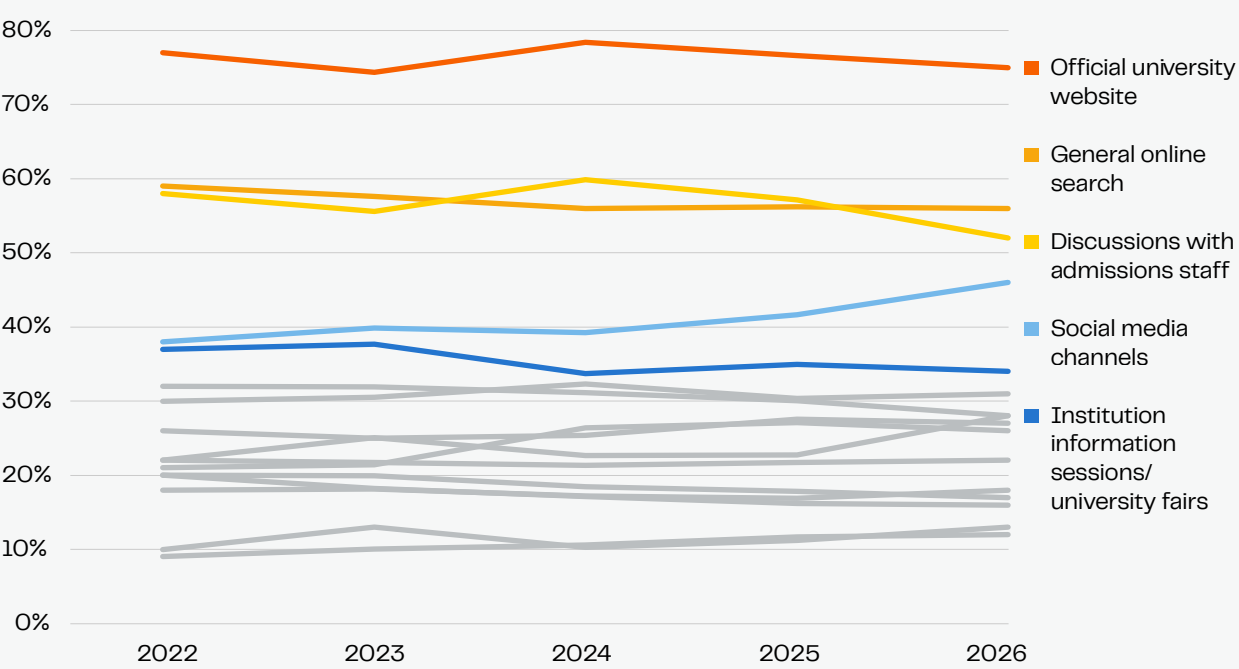
- How are you leveraging academic prestige to strengthen the case for return on investment and reposition affordability as a longer-term value question?
- What messaging are you using to show a welcoming environment with a good student life?
- How can you embed employability messaging within student-facing communication?

The sources of information students use to make decisions

Official university websites remain the most important source of information for UK-bound students when researching institutions. Online search and rankings follow, although all three sources have declined slightly in importance since 2022. Printed prospectuses and brochures continue to lose relevance, falling from 20% in 2022 to 17% in 2026.

Social media is moving in the opposite direction, with importance rising by 8% since 2022, the largest increase of any information source. Over 50% of UK-bound students use Instagram for research when making study decisions. Agents and consultants are also becoming more relevant, underlining the need for institutions to balance owned digital channels with trusted third-party guidance.

Figure 5. UK inbound mobility: Information sources



Source: QS International Student Survey

Key questions to consider:

- How does your digital marketing strategy match with how Gen-Z and Gen Alpha seek information?
- Are you spending time on low-impact activity that fails to convert students?
- Are you using the right mix of social media channels to interact with a global audience?

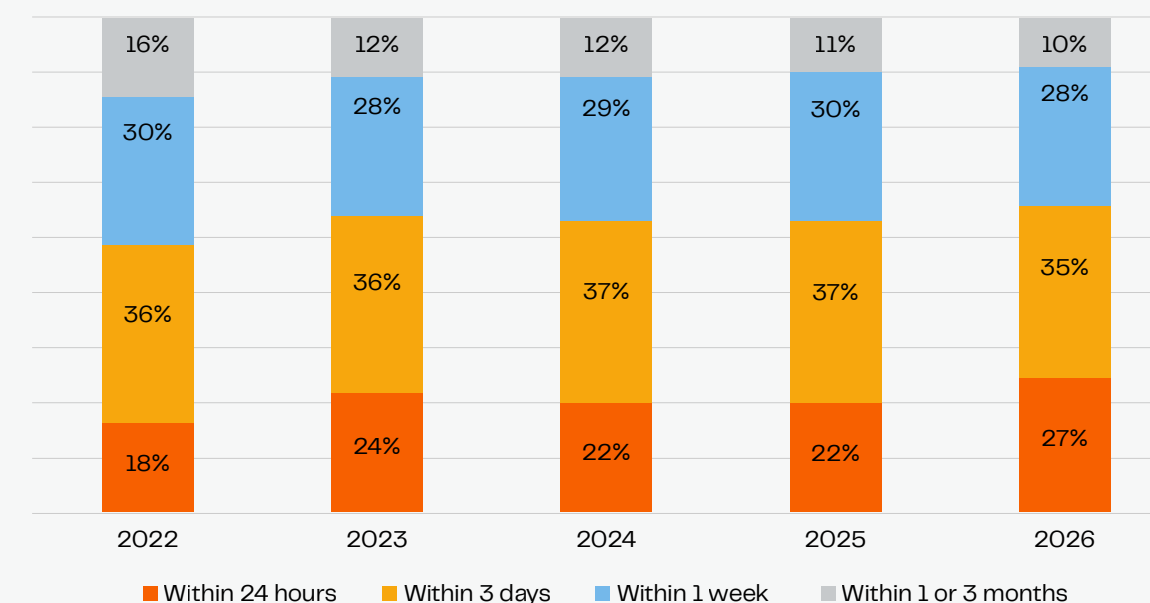


Student conversion and communication

Student expectations for rapid communication are rising at the same time as application behaviour becomes more competitive. Half of prospective students are considering five or more universities, with 10% considering more than ten. Institutions are therefore competing not only on reputation and programme offering, but also on responsiveness. As students compare an increasingly crowded field of options, speed and personalisation can play an important role in keeping applicants engaged.

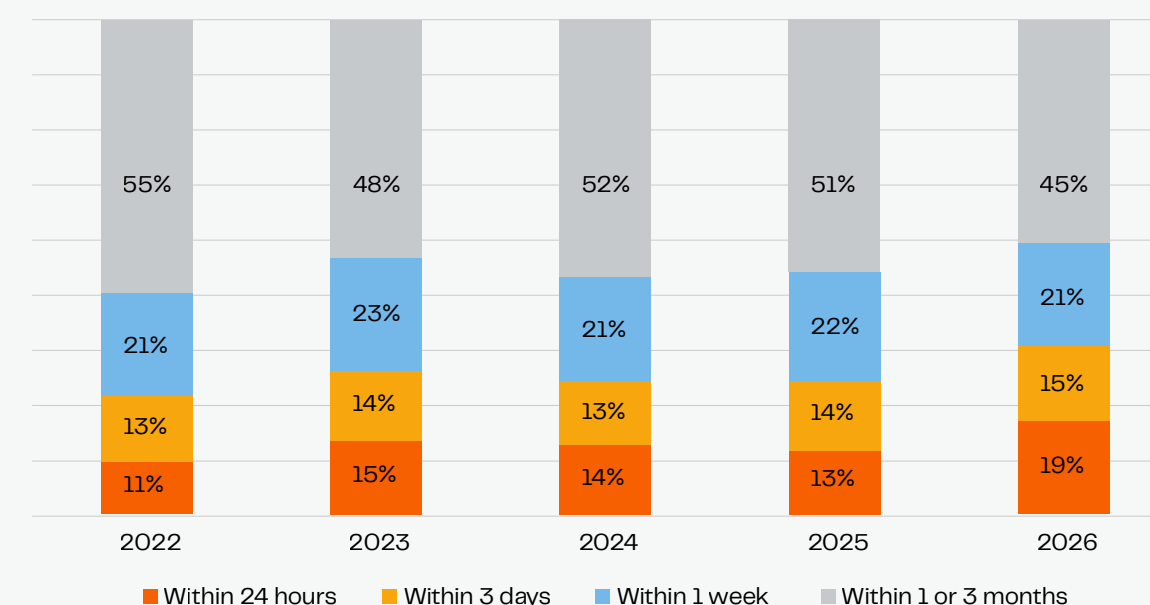
Fewer students now consider three days an acceptable wait for a personal response to an enquiry or application, while the share expecting a response within one day continues to rise year-on-year across contact types. In 2026, 8% more students expect to know the outcome of their application within 24 hours than in 2022.

Figure 6. UK Inbound mobility: Expectation of time to receive a complete and personal response to enquiry



Source: QS International Student Survey

Figure 7. Expectation of time to receive the outcome of their application



Source: QS International Student Survey

Key questions to consider:

- Are you replying to students quickly enough?
- Are your responses truly personalised?
- What can you do to speed up your application process, in the face of increasing competition?

Methodology

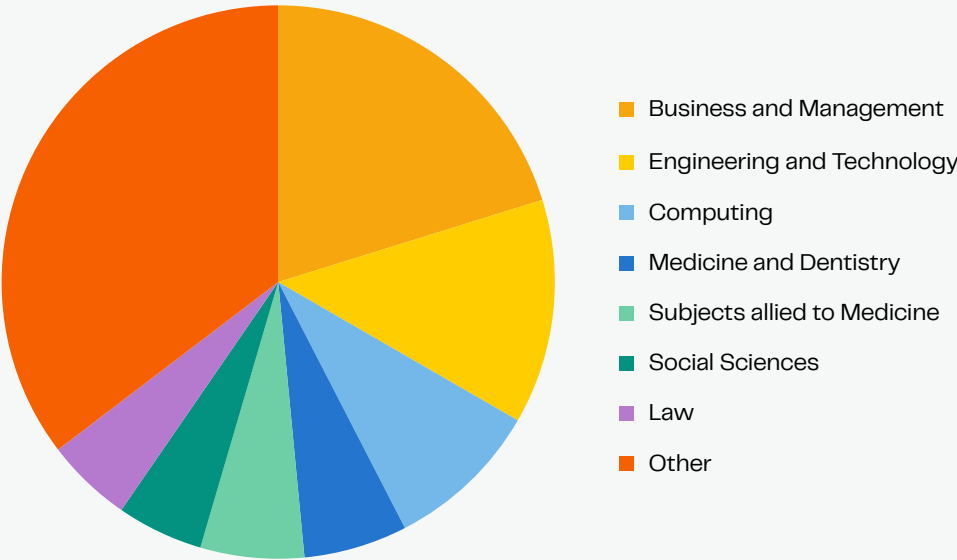
The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2026 iteration draws on responses from over 42,115 students in 191 locations, and this report uses over 500,000 responses from the past five years.

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

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

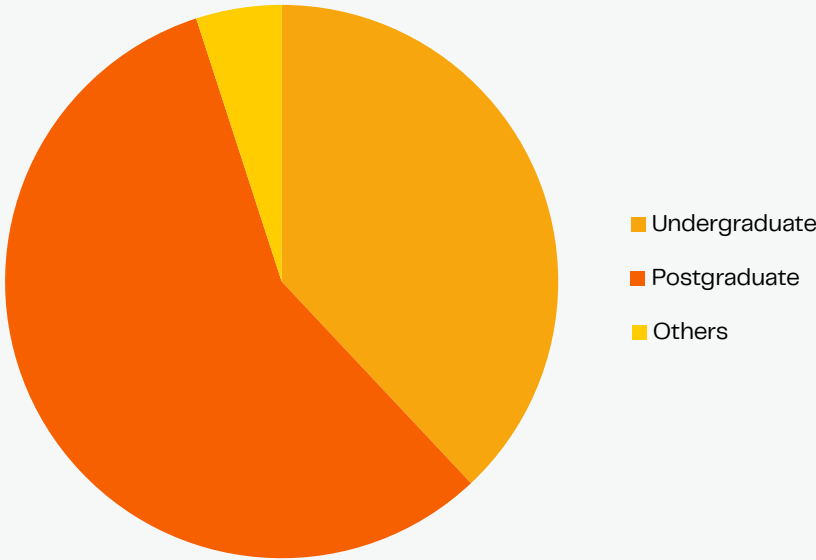
International Student Survey respondent demographics

Subject preference



Source: QS International Student Survey

Study level



Source: QS International Student Survey

QS, your higher education partner

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

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

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

[**Explore more student recruitment insights**](#)

