United States

Global Student Flows
January 2026

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Foreword

Ben Webb
Executive Director, Americas
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I am pleased to present the Global Student Flows: United States report. For the past eight years, the Global Student Flows Initiative has delivered trusted insights for policymakers, universities, and higher education leaders around the world.

This year marks a significant milestone as the Initiative brings together multiple QS datasets - including the QS International Student Survey and institutional performance metrics - with advanced student-mobility flow analysis. This integrated approach offers a more nuanced, comprehensive understanding of the United States' position within global higher education.

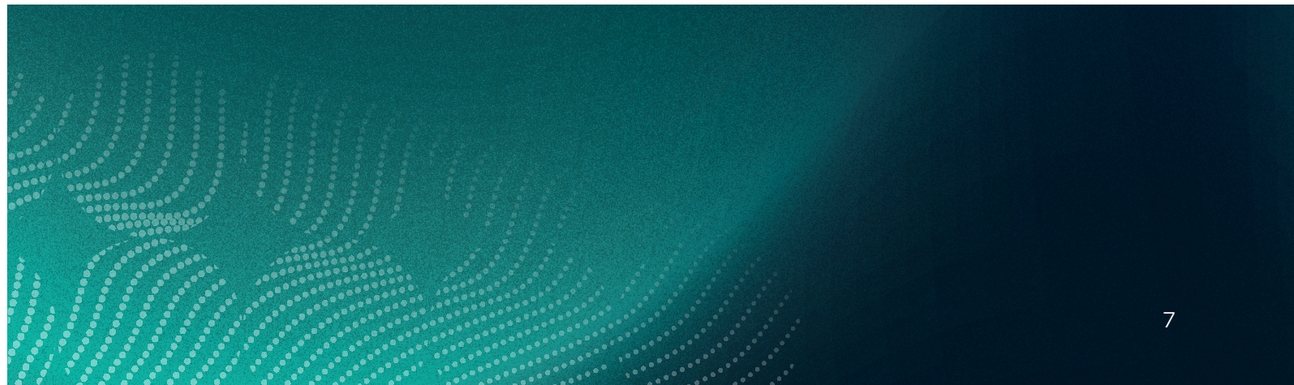
The United States has long stood as one of the world's foremost study destinations, known for its academic excellence, innovation, world-class research, and unmatched breadth of institutional choice. Yet the global landscape is always shifting, and the market share of the 'Big Four' looks to be shrinking. Competitor nations are strengthening their appeal, offering affordable, high-quality education; new regional hubs are emerging; and shifting government policies continue to shape inbound and outbound mobility. US institutions must adapt to manage risk, ensure long-term financial resilience, and identify new opportunities for growth.

This report provides a wide-angle view of international student mobility as it relates to the United States. Using an evidence-based framework, we model potential futures for student recruitment through 2030. Our three scenarios, Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound offer foresight to help higher education leaders plan strategically for the decade ahead.

We also analyze US-bound and US-origin student mobility patterns and forecast student numbers through 2030. When combined with the latest insights from the QS International Student Survey, this analysis leads to practical recommendations to help US institutions strengthen their recruitment pipelines, enhance student engagement, and support long-term student success.

At QS, we remain deeply committed to supporting the US higher education sector's growth ambitions. The insights shared in this report represent only the beginning of what is possible in partnership with QS. Our teams provide advanced analytics for global benchmarking, connect institutions with prospective learners worldwide, and drive innovation and skills development to support sustainable, long-term growth.

With our deep, data-driven understanding of global higher education, we stand ready to help US institutions clarify their strategic position, and empower them to thrive.



Report Findings

Executive Summary

In Brief

US international student numbers are projected to decline by 1% annually through 2030.

As numbers from major source markets decrease, diversification is critical.

Employability and skills-based curricula can be a key differentiator for US colleges.

A Period of Contraction

The United States remains a leading destination for international students, but faces a period of mild contraction in enrollments, projected to decline by approximately 1% annually through 2030. This trend follows years of stagnation, with recent data showing flat or negative growth, especially when excluding Optional Practical Training (OPT) figures. The forecast contraction is driven by geopolitical shifts, changing visa regimes, labor-market incentives, and cost and demographic pressures. Major source countries such as India, China, and South Korea are sending fewer students, with India's numbers particularly vulnerable to changes in work-rights policies and visa uncertainty, and China's decline is seen as an enduring trend due to structural and political factors.

Despite these challenges, there are bright spots: Africa is poised for strong growth, led by Nigeria and Ghana, while smaller markets like Nepal, Bangladesh and Vietnam show resilience and above average growth.

This forecast contraction, and dependency on the policy environment through 2030, underscores the need for scenario-based planning. Our three scenarios - Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound - each highlight the need for strategic adaptation, diversification, and closer alignment with labor-market needs.

Outbound US student mobility is rebounding, with increasing numbers studying abroad, especially in Mexico and the UK. Transnational education and online/hybrid programs are expanding, offering new pathways for global engagement.

The Battle for Market Share

As the number of international students choosing the US stagnates, US institutions will remain in a battle for existing market share. To remain competitive, US institutions must enhance their value proposition, focusing on employment outcomes. International students increasingly seek return on their investment through job opportunities and post-study work.

Overall, the next decade will demand that US institutions engage in deliberate diversification, proactive engagement with policymakers, and a commitment to flexible, skills-based education.

Strategic Challenges

Key Challenges Facing US Higher Education

1. Over-Reliance on Traditional Source Markets

US institutions face declining numbers from major markets such as India, China, and South Korea. The challenge is to diversify recruitment pipelines and capture growth from emerging regions.

2. Evolving Value Proposition

With increasing competition and rising costs, colleges must reverse diminishing reputation among employers, and focus their messaging around academic excellence and employment outcomes. Demonstrating clear return on investment is crucial.

3. Labour Market Alignment

Rapidly changing labor-market needs, especially in STEM, healthcare, and advanced technologies, require institutions to adapt curricula and support services.

4. Policy and Market Uncertainty

Shifting visa regimes, OPT policies, and global competition create uncertainty for students and institutions. US institutions must remain agile, engage proactively with policymakers, and communicate clearly about work rights and post-study opportunities.

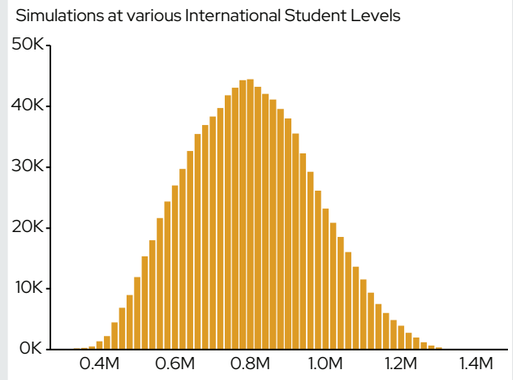
2030 Outlook

International student enrollments in the United States are entering a period of mild contraction, with total numbers projected to decline by roughly 1% annually through 2030. For context, US inflows grew by only 0.2% each year in the six years leading up to 2025, following a 3% annual growth rate recorded in the six years prior. In terms of the outlook, the headline figures mask a more complex reshaping of global demand, driven less by academic considerations and more by geopolitics, visa regimes, labor-market incentives, and demographic pressures. For US universities, the next five years will be defined by tighter competition for talent, heightened sensitivity to policy signals, and shifting opportunities across fast-growing but volatile emerging markets.

The latest Open Doors release illustrates the underlying deceleration. While total enrollments (including OPT) grew by 4%, enrollments excluding OPT - a more accurate reflection of actual student inflows - fell by 0.1%, essentially flat. For comparability, the QS Global Student Flows model removes OPT from the US figures, aligning them with how other countries report enrollments. The stagnation was driven by contractions from major Asian markets; India, China, and South Korea collectively sent nearly 30,000 fewer students than a year earlier. When OPT is included, India appears to have grown (+9%), yet this masks a decline in new academic enrollments and underscores the fragility of US-bound demand once post-study work opportunities are excluded from the narrative.

Data from IIE's 2026 snapshot further confirms this softening. Total enrollments, including OPT, declined by 1% in 2026 according to the data. Undergraduate (+2%) and OPT (+14%) numbers remain resilient, but postgraduate levels fell sharply (-12%), an early warning sign as PG programs typically anchor long-term growth and research capacity. The 17% drop in new enrollments in 2026 signals that by 2027 there is likely to be a significant contraction in overall enrollments from current levels, likely in the mid-single-digit range. Our projections suggest that the downturn in overall enrollments will bottom out before modest recovery resumes toward the end of the decade, averaging to approximately a 1% annual decline in total enrollments from now through 2030.

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



Source: QS Global Student Flows, January 2026

Geopolitics and immigration policy will set the tone. India - long one of the engines of US international enrollment growth - is expected to decline by around 7% through 2030. A decisive factor is the country's heavy reliance on OPT; over 30% of Indian students in the US are on OPT pathways. While OPT is excluded from the Global Student Flows model, it remains central to student decision-making. Any tightening of work-rights policies, uncertainty around future visa rules, or competition from destinations offering clearer post-study routes risks further weakening India's inbound pipeline. Rising concerns about affordability, stricter US consular reviews, and long visa appointment backlogs also weigh on sentiment.

China, meanwhile, faces structural rather than cyclical pressures. The US–China relationship remains fraught, and while economic interdependence tempers the downside, persistent security concerns, restrictions on sensitive fields, and political rhetoric have prompted families to diversify study destinations. The US is still viewed favorably for STEM excellence, but China's outbound mobility has plateaued. We project a continuation of the roughly 4% annual declines seen in recent years. Domestic factors - slower economic growth and Beijing's push to strengthen its own higher-education system - further dampen outbound flows. For US institutions, China's retreat is likely durable rather than temporary in contrast to the decline in India's numbers which are likely to rebound.

South Korea's decline is more demographic than geopolitical. The country's shrinking youth population has reduced overseas study volumes for more than a decade, and this structural trend will continue into the 2030s. While the US remains a preferred destination, the total pool of outbound students is simply smaller each year, leaving limited room for reversal.

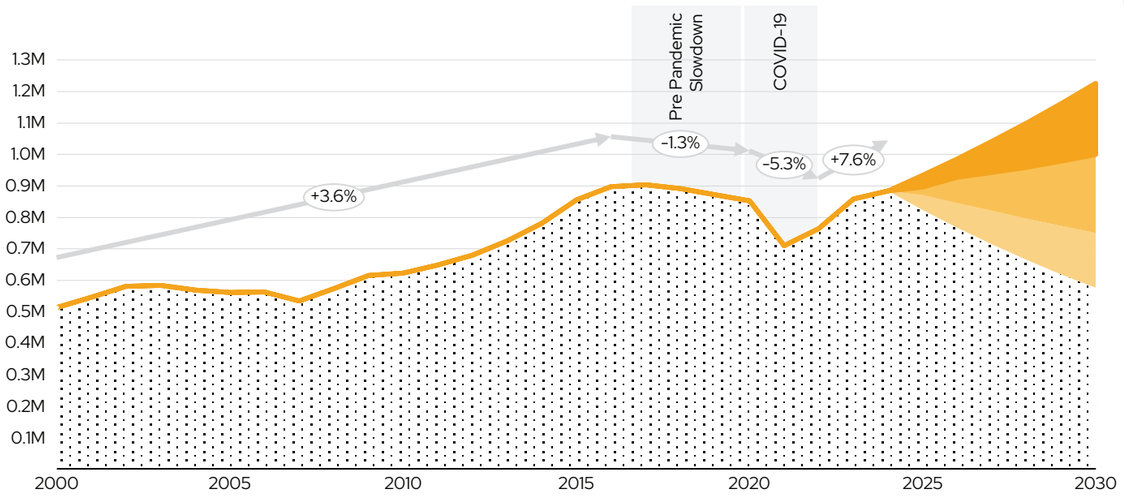
There are, however, bright spots. Africa is poised to deliver the strongest regional growth, led by Nigeria and Ghana, where demographic momentum and demand for high-quality education remain robust despite economic headwinds. Visa policy will be decisive; improved processing consistency and targeted recruitment could convert latent demand into sustained inflows.

South Asia - which was the fastest-growing region in the 6 years to 2024 - is expected to contract by around 2% over the next six years, largely because India constitutes such a large share of US-bound traffic. Yet within the region, smaller markets such as Nepal and Bangladesh continue to show surprising resilience and are likely to maintain double-digit growth.

Vietnam also stands out as an emerging engine of growth, posting an 18% increase last year. Its expanding middle class, strong English-language preparation, and preference for business and STEM fields position it as one of the most reliable medium-term markets for US institutions.

Overall, the coming decade will demand more deliberate diversification, tighter alignment with labor-market narratives, and proactive engagement with policymakers. The US remains a top global destination - but will need to work harder to stay there.

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



Source: QS Global Student Flows, January 2026

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

Country	2024 Rank	2024 Flow	2030 Rank	2030 Flow	2024 - 2030 CAGR	Lower to Upper Confidence Interval - CAGR Spread
China	2	216K	1 ▲	165K	-4.4%	-7% 1%
India	1	234K	2 ▼	163K	-5.9%	-6% 5%
Nepal	10	13K	3 ▲	43K	21.3%	-2% 29%
Vietnam	5	19K	4 ▲	35K	11.1%	-1% 13%
South Korea	3	35K	5 ▼	28K	-3.6%	-6% 1%
Ghana	19	8K	6 ▲	23K	18.4%	-5% 21%
Nigeria	7	17K	7	21K	4.3%	-4% 7%
Canada	4	25K	8 ▼	21K	-2.7%	-4% 5%
Bangladesh	8	15K	9 ▼	20K	5.4%	-2% 10%
Taiwan	6	17K	10 ▼	18K	1.2%	-4% 4%
Brazil	9	14K	11 ▼	17K	2.8%	-2% 3%
Pakistan	16	9K	12 ▲	15K	9.3%	-5% 12%
Mexico	12	13K	13 ▼	14K	1.1%	-3% 4%
United Kingdom	15	9K	14 ▲	12K	5.0%	-3% 7%
Iran	14	11K	15 ▼	12K	1.4%	-8% 7%
Japan	13	12K	16 ▼	11K	-2.7%	-5% 1%
Spain	21	7K	17 ▲	9K	3.4%	-2% 6%
Colombia	17	8K	18 ▼	9K	1.3%	-8% 6%
Türkiye	20	7K	19 ▲	9K	2.6%	-3% 4%
Kenya	31	4K	20 ▲	7K	12.1%	-5% 6%

-10% -5% 0% 10% 20%

Source: QS Global Student Flows, January 2026

The Three Scenarios for 2030

and How They Impact the US

Regulated Regionalism

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

Hybrid Multiversity

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

Talent Race Rebound

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

Regulated Regionalism

Under a Regulated Regionalism trajectory, international student mobility becomes more regionally distributed, and the United States faces a more competitive, policy-structured global environment. While US demand remains strong, a growing number of students - particularly from South Asia, East Asia, the Middle East, and Africa - pursue high-quality regional alternatives due to geopolitics, rising investment in local universities, branch campuses, and transnational digital pathways. This reduces the proportion of globally mobile students who automatically view the US as the default destination.

In parallel, Canada, Australia, and the UK increasingly formalize international student intake thresholds based on housing supply, institutional capacity, and labor-market alignment. Although the US does not move toward national quotas, federal agencies and state systems adopt tighter monitoring frameworks: requiring clearer evidence of institutional support capacity, improved transparency on employment outcomes, and enhanced oversight of student services.

To encourage inbound flows, US universities respond by sharpening their value proposition - highlighting research-intensive environments, industry linkages, and disciplined student-support structures. Competition intensifies for applicants in priority fields such as computing, engineering, and health sciences, while overall mobility becomes more selective and program-specific.

Regionally concentrated flows elsewhere mean the US receives a smaller share of students seeking lower-cost or shorter-distance study. Under Regulated Regionalism, the US international student market attracts those prioritizing advanced research, reputation, and post-graduate opportunities.

Hybrid Multiversity

The Hybrid Multiversity scenario envisions a US international education system increasingly embedded in multi-site, digitally enabled learning models. By 2030, a substantial share of prospective students engage with US institutions through partnerships in their home countries - completing foundational coursework online or through local affiliates before undertaking shorter, targeted study phases in the United States.

These US-led hybrid pathways are supported by expanded credit-transfer agreements, jointly delivered curricula, and shared quality assurance arrangements with institutions abroad. Faculty collaboration tools allow alignment of syllabi, assessment calendars, and moderation systems, enabling smoother progression into US campuses.

On campus, the US learning environment evolves toward specialized, high-value experiences: research labs, clinical and engineering training sites, entrepreneurial incubators, and applied industry partnerships. Students visit the US for periods that maximize hands-on learning, professional networking, and workplace-integrated internships.

Career development becomes embedded into the model. Micro-credentials earned during the home-country phase - often tied to digital skills, analytics, or professional competencies - are integrated into US academic records. Universities work with employers to structure hybrid internships, including remote placements early on and in-person capstone experiences in the US.

Policymakers streamline visa processes for short-term academic mobility and clarify how hybrid or online components count toward work authorization and practical training pathways. These adjustments maintain the US as a central anchor in the global learning ecosystem while making study abroad more flexible and cost-efficient.

The result is a diversified US international education model; globally connected, digitally supported, and oriented toward high-impact learning and employability outcomes.

Talent Race Rebound

In the Talent Race Rebound scenario, international education becomes tightly linked to the United States' efforts to address structural workforce shortages and maintain competitiveness in advanced technology sectors. By 2030, demographic pressures and rising demand for specialized skills push federal policymakers to prioritize international talent attraction as part of a broader economic strategy.

US agencies streamline visa processing for students in priority fields such as artificial intelligence, cybersecurity, quantum science, advanced manufacturing, health professions, and clean energy. Processing times accelerate, compliance systems become more efficient, and pathways from study to work - particularly through OPT and STEM OPT - are clarified and expanded. Discussion around structured, points-based transitions to employment gains momentum in high-demand sectors.

Universities operate in closer alignment with industry and government. Public and private scholarship schemes grow, targeted at programs with clear workforce relevance. Employers co-invest in research partnerships and graduate internships, creating more predictable pipelines from study to skilled employment.

Research ecosystems benefit from federal investments in laboratory infrastructure, regional innovation hubs, and globally competitive faculty recruitment. These factors enhance institutional attractiveness for international students seeking research-intensive environments.

Housing and capacity constraints are addressed through coordinated public–private development in campus-adjacent and regional innovation districts, enabling institutions to scale enrollment sustainably.

For students, the US offers a compelling combination; world-class academic environments, technology-driven research opportunities, and credible post-study employment pathways. Large emerging markets- particularly India, Nigeria, Indonesia, and Brazil - respond strongly, driving increased applications to STEM and health programs.

In this scenario, international education consolidates its role as a strategic lever in strengthening the US workforce and innovation system.

Outbound Trends

Study Abroad

US outbound student mobility has rebounded significantly in recent years, reflecting renewed interest in gaining global experience among American students. During the 2023/24 academic year, the total number of US students studying abroad for academic credit increased by 6%, with enrollments in over 170 destinations. The US has positioned itself as the sixth leading source market for international students, following emerging players in the Asian region. Traditional anglophone countries, particularly in Europe, have been predominantly attracting flows. However, Mexico accounts for the largest share of outbound numbers from the country. As of 2024, over 150,000 Americans pursue higher education overseas, with numbers projected to exceed 200,000 by 2030.

A major feature of the US outbound landscape is the shift towards faculty-led, short-term mobility programs. As the increasing demand for studying abroad is driven by students' growing interest in experiencing a culturally immersive environment while pursuing their studies, affordability and professional development also contribute to these trends. In addition, even in countries where English is not the primary language, the number of English-taught programs has risen globally. US students currently account for approximately 40% of Mexico's international student body, with an annual growth of 12% projected over the next five years. The UK follows closely behind, hosting 25,000 American students in 2024. Although European destinations such as Spain, France, Germany, and Italy are popular choices, US students account for only 1% of the region's foreign population.

Government and institutional efforts to expand study-abroad participation have played a crucial role in US outbound mobility. NAFSA, for example, is a leading US-based organization that promotes international education and exchange. Central to its initiative of expanding study abroad is NAFSA's advocacy for the Senator Paul Simon Study Abroad Program Act. As American student enrollments in foreign universities plummeted at the height of the COVID-19 pandemic, these efforts aimed to enable easy access to opportunities, encouraging study in non-traditional destinations. The US Department of State's "USA Study Abroad" website acts as a comprehensive resource hub, allowing students to explore available scholarship opportunities.

Overall, US students are increasingly showing interest in higher education pathways overseas. With outbound student mobility growing at an average rate of 6% from 2022 to 2025, the country is becoming an important source market for international enrollments. Supportive government policies, scholarship schemes, and a strong demand for experiential learning continue to drive these flows. Together, these factors reflect the expanding global footprint of US students across the international higher education landscape.

Transnational Education

Transnational education has become a central pillar for US institutions, enabling them to offer their globally ranked programs worldwide despite the increasing international student caps by the US government and the growing complexity of global mobility policies. For many American universities, offshore delivery models such as international branch campuses, micro campuses, and joint universities provide a more stable pathway for global engagement than relying solely on inbound international students.

Across the global landscape, the US remains the largest provider of TNE worldwide, supported by a diverse network of more than 250 active American HEIs operating in 80 countries. Over 700,000 students are enrolled in US higher-education programs delivered outside the US, an expansive ecosystem that includes branch campuses, accredited degree programs, joint delivery arrangements, and micro campuses.

Canada, Singapore, Greece, and Qatar are among the countries hosting a significant number of US branch campuses. While these campuses provide strong brand visibility and maintain quality control, they remain costly ventures, leading many institutions toward more flexible, partnership-based models in recent years. East and Southeast Asia dominate US TNE activity, hosting many of the micro-campuses and American international joint universities. China, South Korea, Qatar, Singapore, and Vietnam are among the most active host markets, reflecting long-standing academic cooperation and sustained demand for US degrees delivered closer to home.

Transnational education through branch campuses remains a vital component of international engagement. Globally, there were 384 overseas branch campuses across 85 host countries as of 2025, representing a 15% increase from the 333 branch campuses recorded in 2023. The US leads this model with around 97 branch campuses, outpacing other competing countries. In comparison, the United Kingdom operates 51 campuses across multiple regions, particularly in Asia and the Middle East. Russia, although active, remains behind the UK in scale, with 43 branch campuses. Canada, with just nine branch campuses, is in the early stages of taking strategic steps to increase its presence. Together, these figures highlight how the US has shaped the global landscape of transnational education. Further, these trends underscore the importance of maintaining high-quality delivery, cultivating strong partnerships, and strategically positioning universities internationally to remain competitive.

Looking ahead, the US is poised to strengthen its leadership in transnational education by expanding into high-growth regions and deepening strategic partnerships. As global demand for US degrees delivered closer to home continues to rise, American institutions are adopting more flexible models such as micro-campuses, joint universities, and branch campuses to ensure quality and long-term competitiveness. These efforts will be essential for sustaining the global influence of US higher education in an increasingly competitive landscape.

Online and Hybrid Programs

Online and hybrid learning are set to become a more established part of US higher education by 2030. Growth will be steady, supported by shifting student expectations and long-term digital investment across universities. Institutions are not aiming for rapid expansion, but rather for stable, flexible systems that can serve different learner groups, including international students.

Recent enrollment patterns show how firmly online learning has taken hold. In the US, more than 54% of college students took at least one online course in 2022, signalling that digital delivery has become a normal part of the student experience. A sizable share studied fully online as well. NCES data indicate that 28% of undergraduates and 36% of graduate students at public universities were enrolled exclusively online in 2021. These numbers show how flexible formats are increasingly becoming embedded into learning models across the sector.

Universities are responding with wider digital upgrades. Many institutions are expanding online course offerings, improving learning platforms, and creating hybrid-ready classrooms equipped for lecture capture and virtual delivery. This shift reflects a long-term commitment to flexible learning rather than a temporary post-pandemic adjustment.

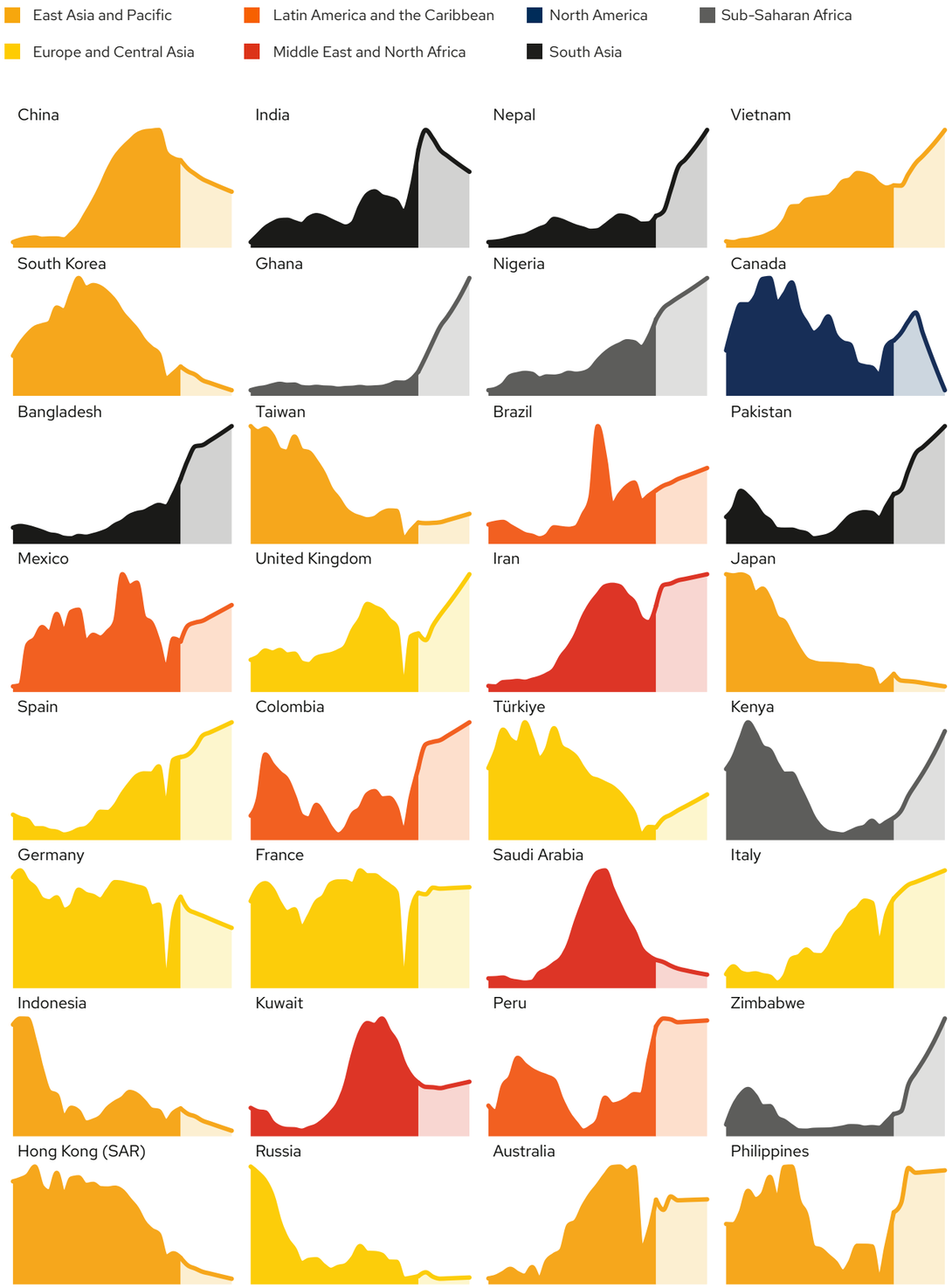
International students are also beginning to use these pathways in different ways. Some complete early coursework online before transitioning to campus, while others take microcredentials or online modules to meet entry requirements. These trends suggest that hybrid entry routes will gradually expand, offering more options for students who want flexibility before committing to full-time in-person study.

However, traditional delivery will continue to dominate. Many students still prefer on-campus learning for social integration, peer networks, and perceived academic quality. As a result, online and hybrid formats will grow alongside, rather than replace, face-to-face education.

By 2030, the US is expected to see a moderate increase in structured hybrid programs, wider acceptance of online credits in admissions, and more mixed-mode offerings targeting working learners and international applicants. The overall direction is incremental but clear; flexibility is becoming a defining feature of the US higher education model.

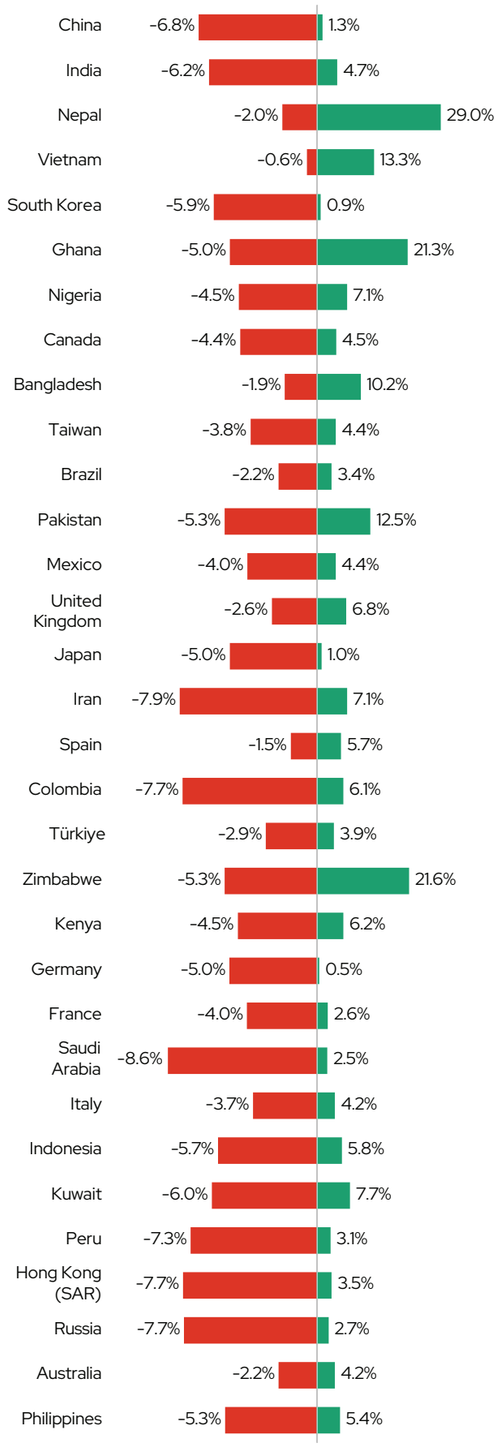
US Inbound Trends

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



Source: QS Global Student Flows, January 2026

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



Source: QS Global Student Flows, January 2026

South Asia

South Asian enrollments in the US are expected to fall by about 3% a year through 2030. The outlook depends heavily on the government's plan to curtail the OPT scheme, which has been a central draw for students from India, Bangladesh and Nepal. Any move to reduce it is likely to weaken demand, especially among Indian postgraduates who rely on work rights to recover the cost of a degree. Much of this downward trend will be shaped by how far the government cuts back on OPT.

South Asia has become one of the most important regions in the US international student market. Students from the region make up roughly 30% of all foreign enrollments. Interest has long been strongest in STEM graduate programs, although undergraduate numbers are now rising. In 2024, India passed China to become the largest source of international students in the US for the first time since 2008.

America's pull rests on the reputation of its universities, strong research programs and the chance to gain experience in its technology sector. During the 2022-23 academic year, South Asian enrollments grew by 30%, with India and Nepal recording increases of 50% and 30%. OPT played a major part in this. Indian students accounted for nearly half of all newly issued STEM OPT permits in 2024.

Nepali student flows to the US are expected to grow by around 20% over the next five years, positioning it as the country's third largest source in 2030. Students from these countries continue to show particular interest in STEM subjects. The F-1 Visa has been a key driver for students from the region, allowing them to work part-time on campus for up to 20 hours a week. Nepali student grants under this scheme doubled in 2024. Enrollments from Bangladesh and Pakistan are projected to grow at an average of 5% and 10% respectively, from 2024 to 2030, other countries across the region appear to show signs of positive growth.

Overall, the region's mobility patterns indicate South Asia's growing influence on international higher education in the US. Shifting visa policies, administrative barriers, and tightened immigration systems have introduced new complexities, creating uncertainty for prospective students from the region.

East Asia

East Asian demand for American higher education is entering a period of mixed growth. The region is expected to fall by around 2% through 2030. Although the US still benefits from its strength in STEM fields and the work opportunities available through the OPT scheme - a major draw for students across the region, visa restrictions, political tension, and stronger domestic universities are beginning to curb student interest. China's decline is the main factor, with numbers declining by 4% annually over the next five years.

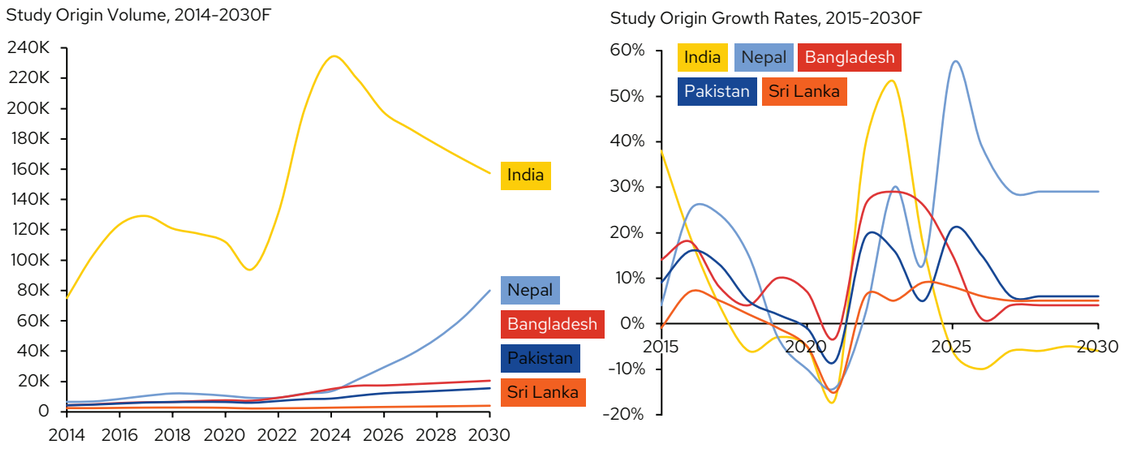
East Asian student enrollments accounted for nearly 40% of the US's foreign enrollments in 2024. The US is the region's second most popular destination after Australia, but China's share has been falling for five years. India overtook China in 2024, driven by more restrictive US visa policies. In 2025, the State Department signaled tougher revocations for some Chinese students, adding to uncertainty.

South Koreans continue to account for around 4% of America's international students. Joint programs, including the Korea-US Educational Exchange Initiative for Youth in STEM and a long-standing Fulbright agreement, support this flow. Even so, Korean numbers are projected to fall by 3% over the next five years. Japan is following a similar pattern. A weak yen has made studying in the US more expensive, though exchange frameworks such as CULCON keep academic ties active.

Taiwan and Japan add smaller but steady cohorts, making up roughly 2% and 1% of enrollments. Taiwan's outward-looking university system encourages study abroad, and the US remains a preferred destination.

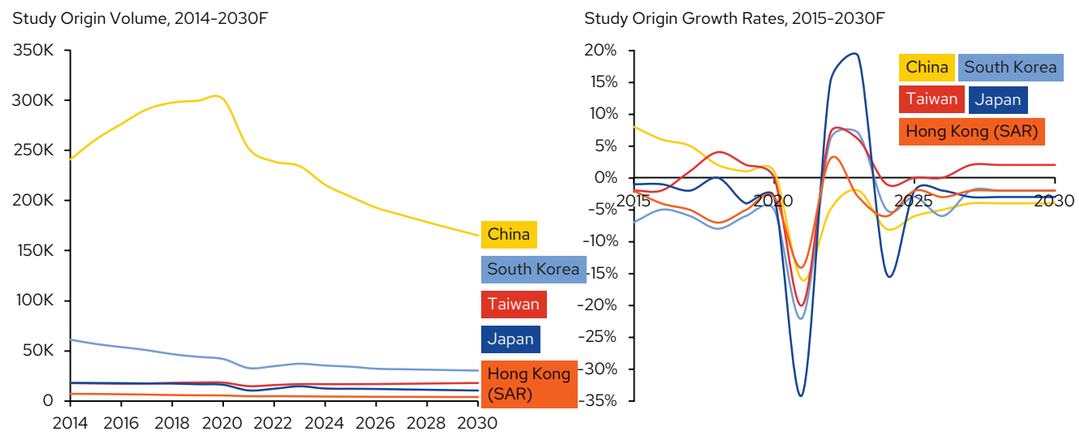
East Asian student mobility to America is now shaped by a mix of policy friction, cost pressures, and continuing interest in STEM. The region remains central to US universities, but the era of rapid expansion has given way to slower, more uneven growth. The outlook points to stability rather than acceleration.

Figure 6. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Figure 7. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Africa

African demand for American higher education is set to remain strong, and is expected to grow at around 9% over the next five years. Growth is driven by population pressures, limited university capacity at home, and the continuing appeal of US institutions. The US benefits from its academic reputation, broad program range, and post-study work options, which keep African interest high.

Nigeria remains the leading African source country for international students in the US. It is the only Sub-Saharan African country among the US's top 10 source markets. enrollments from Nigeria have grown at an average rate of 8% between 2019 and 2024, with numbers projected to increase by 4% over the next five years. A key driver for this trend is Nigeria's fast-growing and youthful population, sustained demand. Moreover, this growth is supported by the availability of fully funded and merit-based scholarships for Nigerian students, such as the University of Michigan Dearborn Scholarship and the University of Dayton Merit Scholarship. Although the US places limits on F-1 visa approvals for international students, the rise in F-1 visas issued to Nigerian applicants indicates strong and continued growth.

Ghana is the second-largest African source country for US foreign enrollments, growing at an average rate of around 22% for the past five years. enrollments are projected to continue rising by about 18% annually through 2030, driven by an expanding middle class that increases households' ability to finance overseas education. Further, Ghana's large and youthful population boosts demand for higher education, while the country's widespread English proficiency lowers language barriers for students studying in the US.

The US attracts African students through its strong academic reputation, wide program diversity and post-study career opportunities. The perceived value of an America degree continue to make the US one of the most preferred destinations for African students.

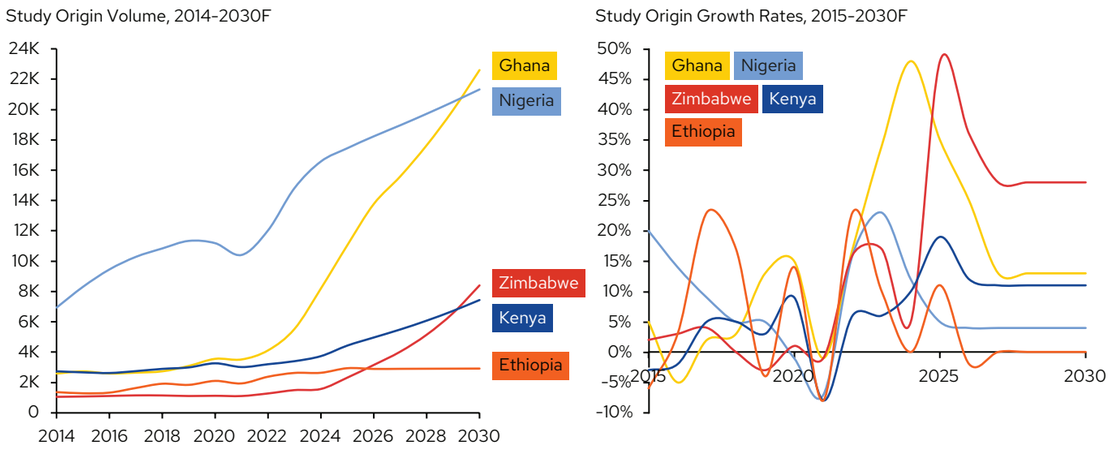
Europe

Student flows from Europe to the US are expected to moderate over the next few years. The projected annual growth rate for the next five years is 1.5%, which reflects a mature and highly competitive market. Europe currently accounts for only about 9% of all international students in the US, with most of this share coming from a few key countries: the UK, Germany, Türkiye, Spain, France, and Italy. Following disruptions caused by the COVID-19 pandemic, recovery has been uneven. Enrollments from Europe dropped by about 25% in 2021, but the sector bounced back in 2022 with growth of around 25% as borders reopened and confidence returned. Since then, numbers have stabilized. Growth is no longer strong, but demand remains consistent, and the US continues to hold its position as a steady, long-term choice for European students.

This moderation is taking place even as the US continues to promote itself actively in Europe. The American government supports outbound recruitment through large networks like EducationUSA, which operates advising centers, university fairs, and pre-departure programs across European cities. Scholarship channels such as Fulbright also help keep Europe engaged. Universities themselves play a big role through partnerships, joint programs, and targeted recruitment teams based in Europe. These channels ensure that the US stays visible even in a tight market.

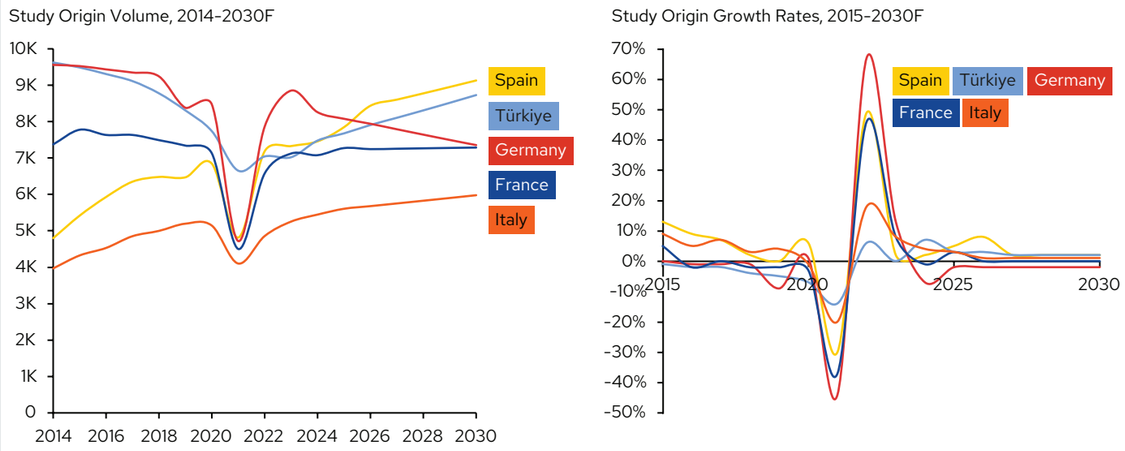
Policy factors also play an important role in shaping student flows. The OPT program is a major attraction for European students because it allows them to work in the US after graduation, especially with the extra 24 months available for STEM fields. However, there remains some uncertainty around how OPT rules may change in the future. Visa processing has also been unpredictable at times, with interview-waiver changes, long appointment wait times, and shifting immigration priorities. These issues create uncertainty and suppress growth from European countries.

Figure 8. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Figure 9. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Southeast Asia

Student demand from Southeast Asia is expected to grow steadily over the next few years, with an average annual growth rate of around 5% from 2024 to 2030. Most of this growth is still expected to come from Vietnam, which is projected to expand rapidly at 11% a year. In contrast, Indonesia is expected to decline by about 2.4%, reflecting weakening outbound momentum. Southeast Asia currently accounts for 5% of all international students in the US, with Vietnam contributing 2% and Indonesia 1% of that total. Despite this base, overall numbers from the region fell by 1.5% in 2024, showing that demand remains present but uneven.

Several factors explain these trends. Rising incomes and strong interest in English-medium education continue to support long-term demand from Vietnam and Indonesia. Students in both countries are also drawn to US business, engineering, and STEM programs. However, many families still face cost pressures. Currency fluctuations and the growing appeal of alternative destinations, especially Canada, Australia, Japan, and South Korea, also shape student decisions.

To stay competitive, the US has expanded EducationUSA advising centers in Vietnam, Indonesia, Thailand, and the Philippines, with regular fairs and virtual sessions for students and parents. US universities have also increased their presence through joint programs, recruitment tours, and school partnerships in major cities like Ho Chi Minh City, Hanoi, Jakarta, and Bangkok. Visa processing has improved in some locations, especially in Vietnam and the Philippines. The option to work in the US for up to three years after completing a STEM degree is another major attraction. The US also supports regional engagement through initiatives like the Young Southeast Asian Leaders Initiative (YSEALI), which strengthens academic and cultural ties with ASEAN countries. These efforts help the US stay visible in a region facing strong competition from other study destinations.

Overall, the outlook for Southeast Asia indicates steady growth. The region relies heavily on Vietnam and Indonesia, while other markets remain flat. The US remains a strong destination, but growth will continue at a moderate pace.

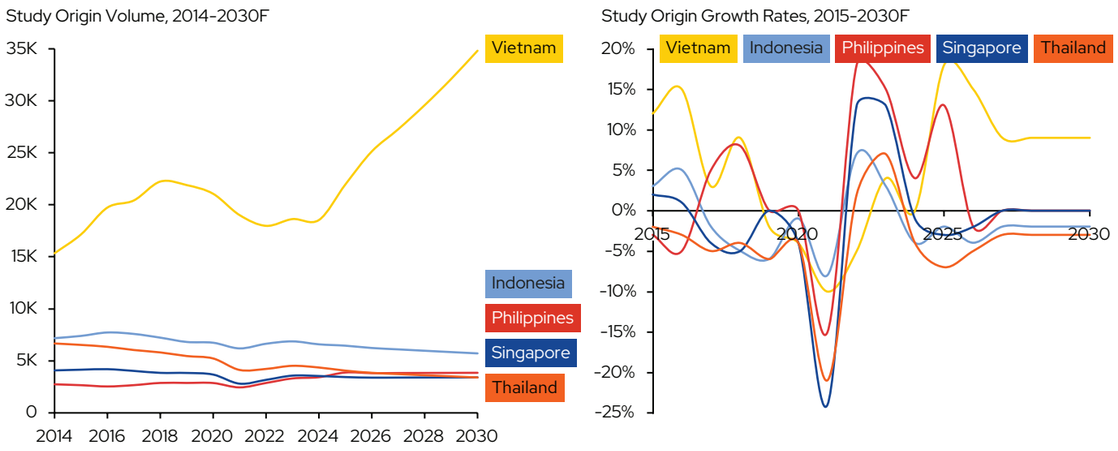
Middle East and North Africa

Student mobility from the MENA region to the US has been decreasing, with a rise of intra-regional flows despite American universities continuing to offer superior educational quality, research opportunities, diverse academic programs, and advanced infrastructure. This decline is expected to continue over the next five years at a rate of around 3% annually. This is largely due to countries such as Saudi Arabia and the UAE emerging as regional education hubs within the region. As a result, students from MENA countries are increasingly choosing to pursue higher education closer to home rather than relocating to the US.

While Saudi Arabia is emerging as a regional education hub, it remains the leading source of MENA students in the US. Enrollments from Saudi Arabia in US institutions have declined by an average of 18% over the past five years and continue to decrease by approximately 10% by 2030. Reforms to the King Abdullah Scholarship Program (KASP), which tightened eligibility and reduced funding for certain fields, the rapid growth of domestic universities, and government priorities under Vision 2030 are key factors affecting the reduction in the number of Saudi enrollments in the US.

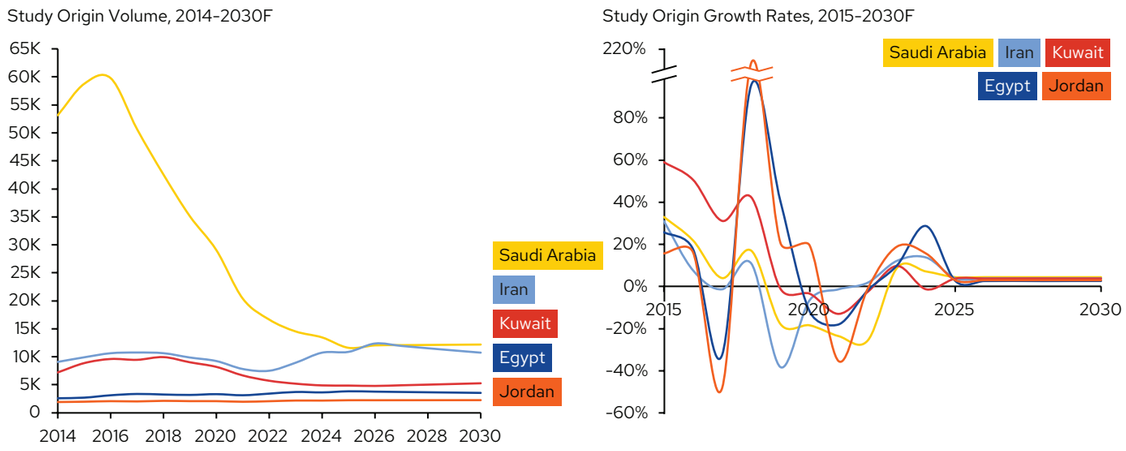
In contrast, Iranian student enrollments in the US are expected to grow at a rate of 1% over the next five years, after having grown at an average rate of 2% from 2019 to 2024. This increase is driven by limited capacity in Iran's graduate programs, particularly in STEM fields, the availability of research opportunities in US universities, and the global recognition of US degrees, which enhance career mobility both internationally and within Iran.

Figure 10. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Figure 11. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Middle East and North Africa

Kuwait is also a leading source country for the US in the MENA region, although enrolllment numbers have declined by approximately 12% over the past five years. This reduction is driven by several factors, including US visa caps on Kuwaiti students, safety and security concerns in the US, and the availability of attractive alternatives closer to home. Changes in scholarship policies have also played a role, as the proportion of government scholarships allocated to US institutions has fluctuated, influencing students' decisions to study in the US.

Although there are fluctuations in the enrollments of MENA students in US institutions, the English-language learning environment itself is a strong motivator, particularly for some MENA students, who often face challenges with English fluency. Similarly, initiatives like EducationUSA, supported by the US Department of State, help streamline the application and transition process for MENA students by offering guidance, orientation, and cultural integration support.

Overall, the growing strength of regional education hubs within the MENA region, shifting scholarship policies, and expanding local university capacity suggest that MENA student enrollments in the US will continue to decline.

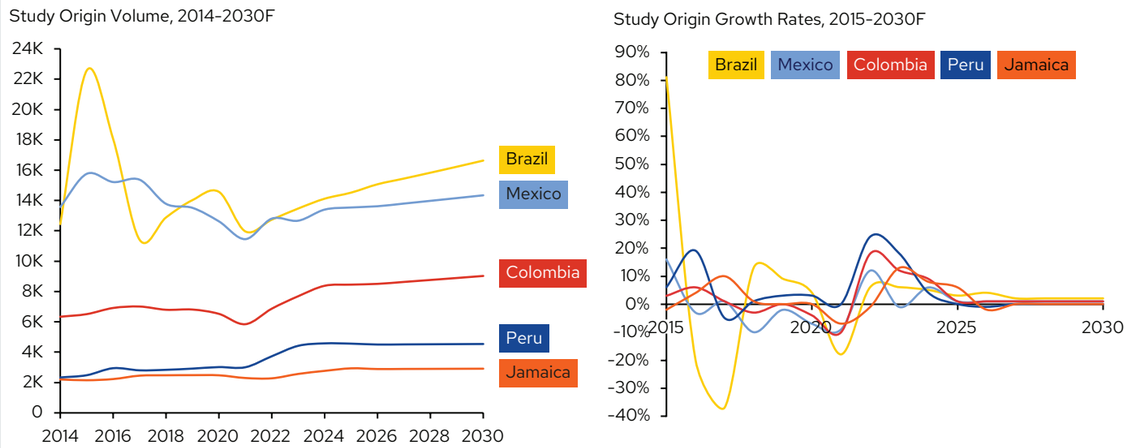
Latin America

Student flows from Latin America to the US are expected to grow only modestly over the next five years, at roughly 1% a year. Brazil, Mexico, and Colombia form the largest group, together accounting for about 6% of America's international student population. Much of the region's outbound mobility has been supported by government-funded scholarships, which have long eased the cost of studying abroad. The recent slowdown reflects a shift towards European alternatives, particularly Spain, which has become more aggressive in recruiting students who have been turned away from US institutions.

Countries in Latin America face a significant skills gap, with companies struggling to fill technical positions. To address this challenge, governments are increasingly promoting study abroad through bilateral partnerships and scholarship initiatives. The Brazil Scientific Mobility Program (BSMP) offered Brazilian students the opportunity to pursue their higher education in the US. However, this initiative was discontinued in 2016. As of 2024, Brazil accounted for 2% of the American international enrollments. While these numbers are largely driven by sustained bilateral partnerships, scholarship programs, and exchange initiatives between the two regions, Brazilian student interest in US institutions is expected to rise by 3% over the next five years.

Competing with Brazil, Mexico has also been ranked as the top country of student inflows from the region, with a 6% increase in numbers in 2024. One key initiative is the US-Mexico Bilateral Forum on Higher Education, Innovation and Research, launched in 2014. The US was the leading destination for Mexican students in 2024. Despite these continued ties, growth appears to be stagnant over the next few years. Colombia and Peru have also emerged as potential source markets, with an average increase of 8% and 7% respectively, from 2022 to 2025.

Figure 12. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, September 2025

Latin America

Following the pandemic, student mobility showed signs of recovery, with numbers quickly recovering to pre-pandemic levels. The US OPT visa remains a key factor, allowing students to gain work experience after graduation. During the 2023-2024 academic year, according to the level of academic study, half of Latin American students in the US pursue undergraduate degrees, representing a larger percentage than students from other regions.

Overall, geographical proximity, government-backed scholarship initiatives, and bilateral ties between LATAM and the US have traditionally impacted student mobility. The outlook on flows over the next few years, however, shows a slight decline in numbers. Despite this, US institutions remain among the top choices for Latin American students studying abroad.

Source: QS Global Student Flows, September 2025

Canada

Canadian student mobility to the US is on a downward trajectory, with growth set to drop at an annual rate of 3%. This is driven by rising tuition costs in the US, a weaker Canadian dollar that makes studying abroad more expensive, and the growing appeal of domestic universities that offer competitive programs at lower cost. Expanded opportunities at home, including stronger research funding and improved graduate pathways, have further reduced the incentive for Canadian students to head south.

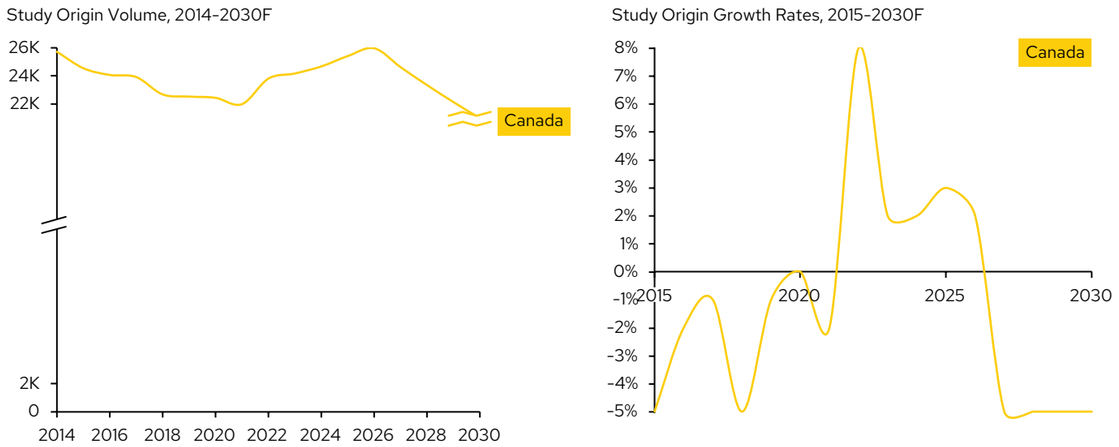
Many Canadian students continue to pursue higher education in the US to access programs and academic specializations that may be limited or unavailable in Canada, such as niche fields in medicine, fine arts, technology, and sports. Additionally, highly competitive admissions at top Canadian universities encourage students to seek alternatives to prestigious universities in the US.

Canadian enrollments in the US have grown by around 2% over the past five years. The US attracts Canadian students through world-class academic resources, extensive program choices, and access to competitive athletic scholarships. The longstanding relationship between the two countries, geographic proximity, and cultural similarity also make the transition smoother for Canadian students. Unlike most international students, Canadians typically do not need an F-1 visa to study in the country. Instead, they enter using appropriate I-20 or DS-2019 documentation, avoiding many of the visa-processing challenges experienced by other foreign students. Additionally, some US universities offer “neighbour country fees”, which provide discounted tuition rates for Canadian students.

Enrollments of Canadian students in US universities are projected to decline by about 3% by 2030, driven by new US visa caps on international students and by ongoing currency and exchange rate volatility between the two countries.

Overall, Canadian student mobility to the US is shaped by strong academic pull factors, limited program capacity in Canada, and the ease of studying across the border. With world-class institutions and minimal administrative barriers, the US is likely to remain a preferred destination for Canadians seeking broader educational opportunities.

Figure 13. US Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, September 2025

Drivers for Growth

How Universities Can Beat the Forecast

Source: QS Global Student Flows, September 2025

Labor Market Dynamics

The US labor market is one of the world's most dynamic, characterized by high job mobility, strong innovation ecosystems, and a diversified economic base spanning advanced manufacturing, technology, healthcare, finance, and services; the US leads the QS World Future Skills Index, with a perfect score in our Future of Work indicator – the only country to achieve this. Despite its strengths, the US faces several structural challenges that shape employment outcomes and long-term competitiveness.

A key issue is the growing skills gap, particularly in STEM fields, healthcare, advanced manufacturing, and digital technologies such as AI and data science. In the QS World Future Skills Index, this gap manifests in the Skills Fit indicator where the US receives its lowest score of our four indicators. Employers report shortages of workers with specialized technical capabilities for the future of work, while many job seekers lack the credentials or experience required for high-growth sectors. At the same time, millions of Americans remain outside the labor force due to childcare barriers, health limitations, or skills obsolescence.

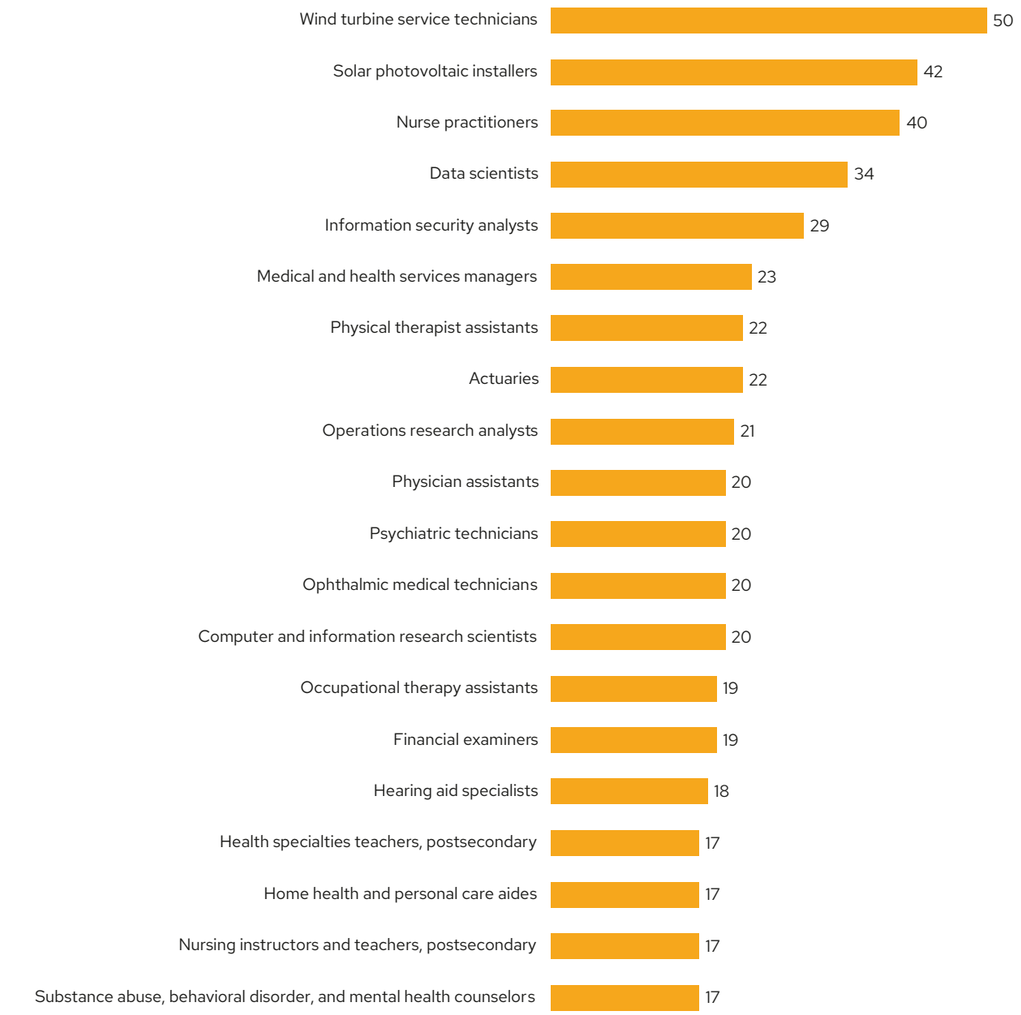
The US labor market is also marked by pronounced inequality. Wage gains over recent decades have disproportionately benefited high-skilled and high-income workers, while those without postsecondary education face declining real wages and fewer opportunities. This has widened socioeconomic disparities and contributed to regional imbalances, particularly in areas that experienced industrial decline.

Higher education plays a critical role in addressing these challenges. Universities and colleges can help bridge the skills gap by modernizing curricula to reflect rapidly evolving industry needs, especially in sustainability, AI, cybersecurity, and biotechnology. According to the US Bureau of Labor Statistics (figure 13), wind turbine service technicians, solar photovoltaic installers and nurse practitioners are the job roles projected to have the highest growth through to 2034. Expanding work-based learning - such as apprenticeships, internships, and 'year in industry' initiatives - can ensure that students gain immediately relevant experience.

Reskilling and lifelong learning will also be a key component of the future skills economy. US colleges and universities can support mid-career workers through flexible, modular learning pathways, including micro-credentials and stackable certificates that allow for continuous reskilling. By investing in affordability reforms, community-college pathways, and targeted support for underrepresented groups, higher education can reduce inequality and expand access to economic opportunities.

Ultimately, a more inclusive, adaptive, and industry-connected higher-education system is essential for maintaining US competitiveness and ensuring broad-based participation in the future economy.

Figure 14. Growth rate % – 2024-2034



Source: US Bureau of Labor Statistics

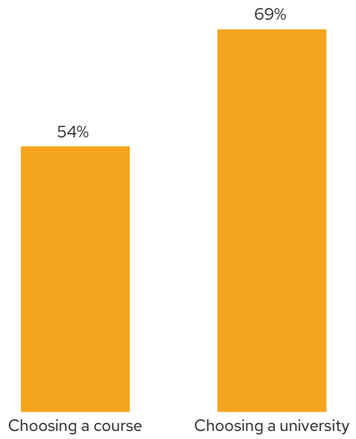
International Student Trends

Reputation Remains a Top Student Priority

Those looking to study in the US are largely driven by reputation. When choosing a course and university, 54% and 69% of students respectively said reputation was important (Figure 15). However, data from the QS World University Rankings shows that work must be done to retain Academic and Employer Reputation. Since 2017, the Median Academic and Employer Reputation rank of US colleges has declined (Figure 16 and 17).

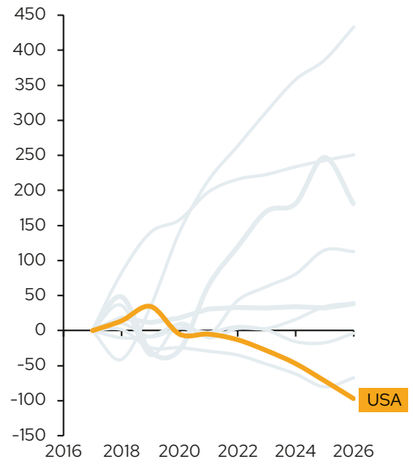
In the face of increasing tuition and living costs, maintaining a solid reputation – which many students associate with performance in university rankings – will be critical for students to justify their investment.

Figure 15. Importance of reputation when choosing a course and university



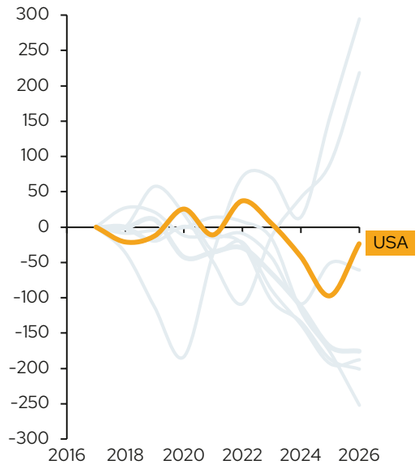
Source: QS International Student Survey 2025

Figure 16. Change in Median Academic Reputation Rank Since 2017



Source: QS World University Rankings

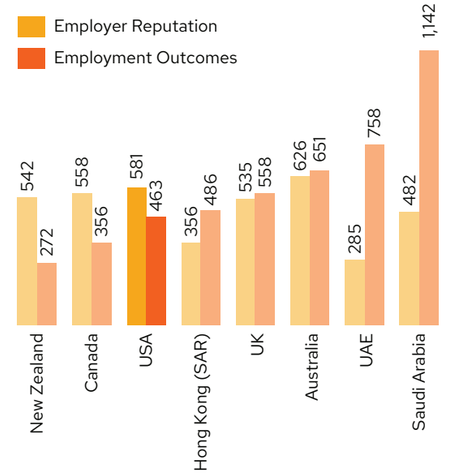
Figure 17. Change in Median Employer Reputation Rank Since 2017



Source: QS World University Rankings

Another way US universities can show return on investment is through their Employment Outcomes. As explored earlier, OPT is a major driver of highly skilled students studying, and working, in the US. This is unsurprising, as we see the average Employment Outcomes rank is lower, and therefore better, than the average Employer Reputation rank (Figure 18). Clearly, US universities and colleges are able to deliver positive graduate outcomes, with graduates securing jobs at high rates, and nurture alumni that go on to make an impact on society. However, US institutions' average reputation among employers is lower than these strong graduate outcomes would suggest. Leveraging the successful narratives of graduates will be critical to reversing the decline in US Employer Reputation.

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



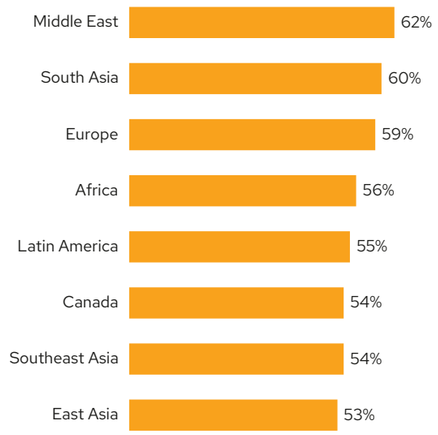
Source: QS World University Rankings 2026

Evidencing Employability Is Necessary

While the median Employer Reputation rank has declined, post-study employment prospects remain crucial in student decision-making. Overall, 50% of all students looking to study in the US report that information on work placements and links to industry are useful in marketing communications (Figure 20); in the key source markets of South and East Asia, that number rises above 50% (Figure 20).

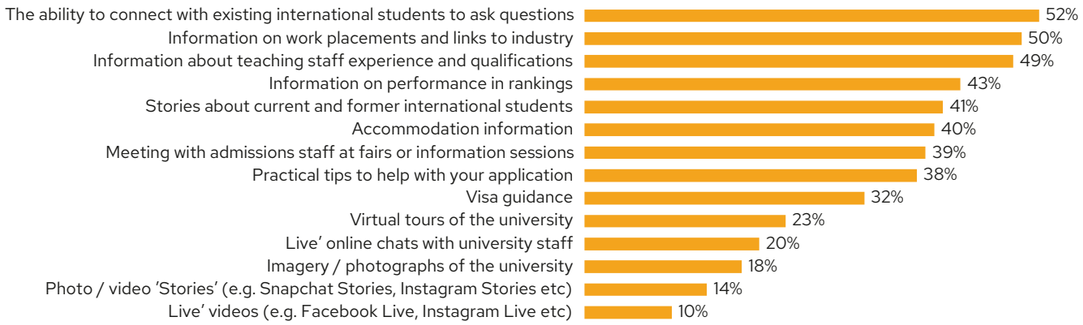
Regardless of region, a majority of students say that, when thinking about career considerations while choosing a course, they base their decision on whether the program allows them to learn new skills (Figure 19). This further emphasizes the importance of skills-based curricula, and using employability as a lever to recruit new students. Students view their college experience as the ideal opportunity to upskill and to learn how to articulate the value they can add to prospective employers through the skills they acquire.

Figure 19. Career Considerations When Choosing a Course
% Of Students Selecting "It Allows Me to Learn New Skills"



Source: QS International Student Survey 2025

Figure 20. Which of the following are most useful to you when making decisions about your studies?



Source: QS International Student Survey 2025

Strategic Imperatives for US Higher Education

Diversify Recruitment Pipelines

US institutions must broaden their recruitment strategies beyond traditional markets - India, China, South Korea – and tap into emerging regions such as Africa, Southeast Asia, and resilient smaller markets like Nepal, Bangladesh, and Vietnam. This diversification will help offset declines in major source countries and capture new growth opportunities.

Align with Labor Market Needs

Institutions must proactively align curricula and support services with labor-market trends, especially in high-demand sectors like STEM, healthcare, and advanced technologies. Partnerships with industry and government, as well as expanded work-based learning opportunities, will be essential for demonstrating employability and supporting student career ambitions.

Enhance Value Proposition

Colleges must sharpen their messaging around academic excellence, research opportunities, and employment outcomes. Highlighting successful graduate stories and leveraging strong alumni outcomes will be key to reversing declines in median Academic and Employer Reputation rank, and attracting students who are increasingly focused on return on investment.

Adapt to Policy and Market Shifts

US universities need to remain agile in response to changing visa regimes, OPT policies, and global competition. Proactive engagement with policymakers and clear communication about work rights and post-study opportunities will help maintain the nation's attractiveness.

Methodology

Global Student Flows

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

Open Source Framework

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

The qualitative research process is informed by extensive interviews with global experts, including economists, policy leaders, and institutional decision-makers. These contributors provide deep contextual insight into specific country-to-country flows, policy settings, and sectoral trends. Quantitative analysis is anchored in both historical datasets and current indicators, supported by HolonIQ by QS's proprietary global flows model. This model employs advanced analytics to simulate multi-factor, high-dimensional data across more than 4,000 unique international student flows.

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

Push Factors	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 programs
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 analyzes population trends and structures within source countries, including youth population growth, urbanization, and educational attainment levels. Demographic pressures, such as a growing tertiary-aged population, are often strong predictors of increased outbound student mobility.

Economic Conditions
The economic context of the source country directly impacts the capacity of individuals to finance international study. A slow economy, low gross domestic product (GDP) per capita, poor income distribution and overall household wealth can all motivate students to seek more prosperous environments abroad.

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

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

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

Pull Factors: Determinants of Destination Market Attractiveness

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

Academic Quality
Academic quality refers to the presence of highly ranked universities and globally recognized academic programs.

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

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

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

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

Disruption Factors: Drivers of Volatility and Alternative Mobility Scenarios

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

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

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

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

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

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

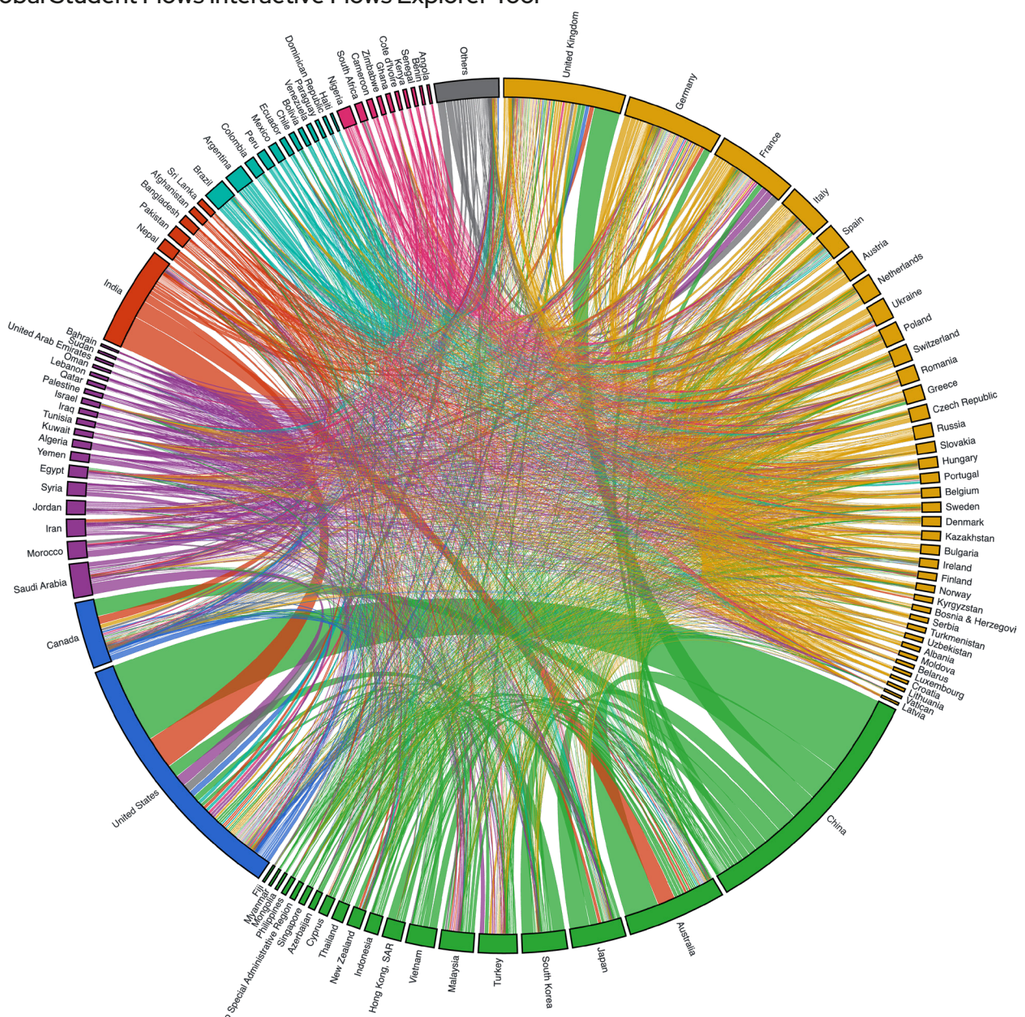
Mapping Flows

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

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

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

Global Student Flows Interactive Flows Explorer Tool



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 modeling with expert-informed qualitative research and quantitative machine learning to estimate future volumes under uncertainty.

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

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

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

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

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

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

Global Student Flows: Open-Source Framework

Push Factors	X	Pull Factors	X	Disruption Factors
Source country Confidence intervals & distribution curves		Destination country Confidence intervals & distribution curves		Disruption factor Probability & distribution curves
Primary research, expert interviews		Primary research, expert interviews		Primary research, expert interviews
Quantitative analysis & machine learning forecasts		Quantitative analysis & machine learning forecasts		Quantitative analysis & machine learning forecasts

QS International Student Survey

The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2025 iteration draws on responses from over 70,000 students in 191 locations.

The questions in the Survey are designed to enable higher education institutions to make sound decisions on recruitment and communication strategies. Now combined with Global Student Flows data, we offer a well-rounded view of where students are choosing to study, and how they make that decision.

To understand what matters to students, we ask a wide range of questions about their pre-enrollment journey. We want to know what students prioritize when choosing a location, university and course, and we want to understand what they perceive as high-quality teaching. We ask students how their family influence decision making, and we gather data on the social media and digital channels they use to find study information.

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

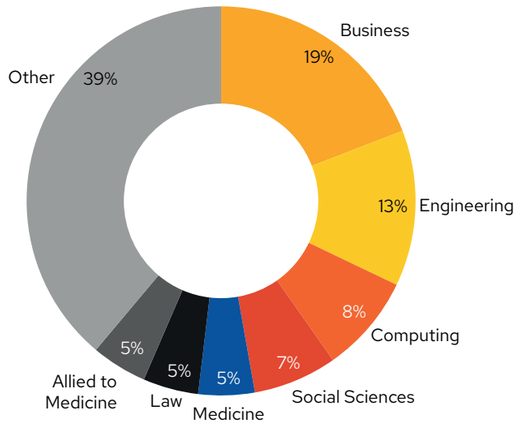
The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 146 universities worldwide, who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

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

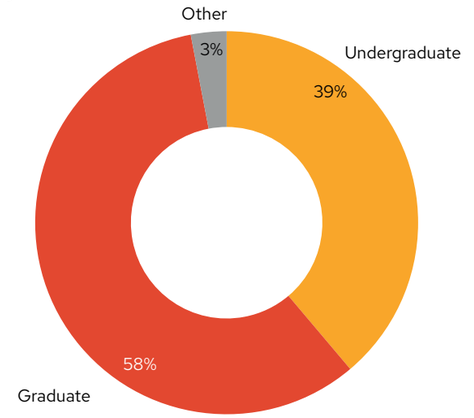
The 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey Respondent Demographics

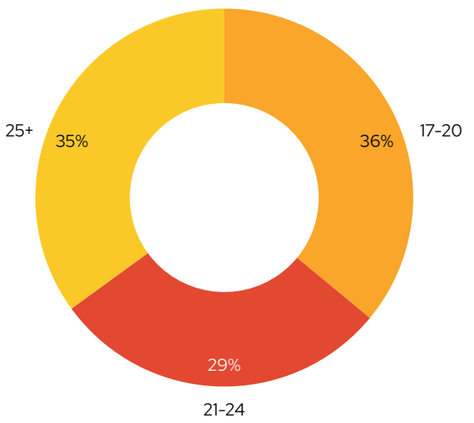
Subject Preference



Study Level



Age



Source: QS Global Student Flows, October 2025

Sources

The Global Student Flows model is built on a diverse and authoritative foundation of international data sources, ensuring high-quality, representative, and up-to-date insights into global student mobility. Drawing from multilateral agencies, national governments, statistical bureaus, and specialized education bodies, the model integrates both inbound and outbound mobility data across all major world regions. These sources reflect the latest available figures on enrollments, visas, migration, scholarships, and institutional capacity, and are harmonized to support robust forecasting and scenario analysis.

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, 2024/25

Japan Student Services Organization (JASSO), 2024

Ministry of Education, Argentina, 2023

Ministry of Education, Brazil, 2022

Ministry of Education, China, 2021

Ministry of Education, Colombia, 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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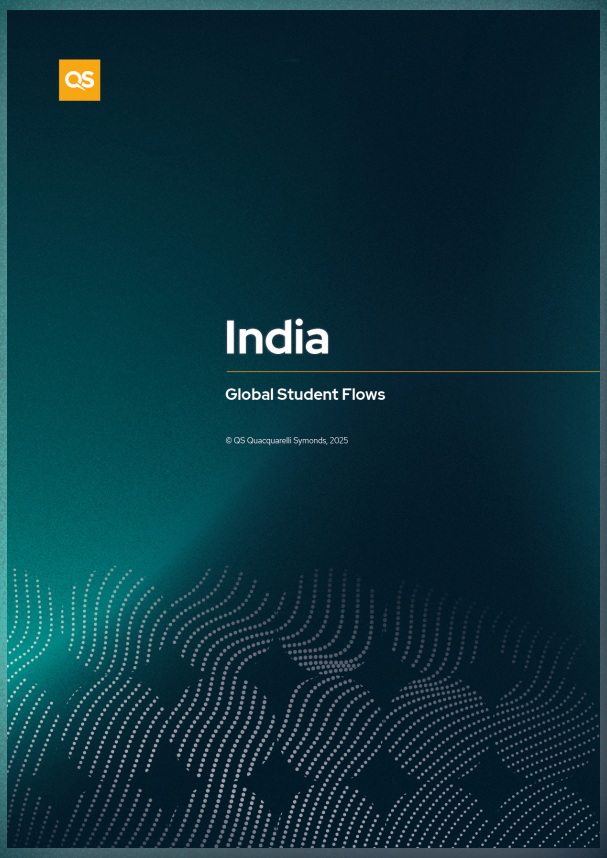
- Gain strategic foresight from global trends
- Scenario plan to prepare for the macro environment shifts ahead



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