Three Scenarios for International Education in 2030

Global Student Flows
July 2025

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Foreword

Jessica Turner
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QS is proud to lead the Global Student Flows Initiative, supporting governments, thousands of universities, and employers worldwide with critical insights into global student mobility. Over the prior eight years, this Initiative has become an essential resource for policymakers, institutional leaders, and industries as they navigate complex decisions in an increasingly uncertain global landscape.

In this year's annual cycle, we have significantly expanded the scope of our Initiative. By incorporating richer QS datasets, including our International Student Survey, institutional performance metrics, and student demand analytics, we offer more comprehensive and actionable insights than ever before. We are also pleased to announce that this year marks the publication of 12 distinct reports, highlighting key regions.

Over the past six months, I have had the privilege of engaging with ministers and officials representing more than 20 governments globally as well as leaders of institutions from across the 80 countries we serve. These discussions reinforced the need for insight that enabled strategic planning, resource allocation, and policy formulation in times of heightened uncertainty with significant shifts in global education patterns. In response we have based our 2025 report on forecasts across a range of scenarios.

Our Global Student Flows 2025 report offers an evidence-based framework outlining three scenarios for international education through 2030—Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound. Each scenario considers geopolitical developments, technological advancements, demographic shifts, and economic transformations, equipping decision-makers with the tools needed to anticipate and adapt to the future.

QS remains committed to supporting you beyond the insights contained within these pages. Our expert teams stand ready to provide further analysis, tailored data, and strategic advice to governments and institutions seeking to strengthen their global education strategies. We look forward to continued collaboration and partnership as you leverage these insights to enhance the resilience and effectiveness of your international education initiatives.

Finally, I wish to extend my sincere gratitude to the policymakers, institutional leaders, and experts worldwide who have generously contributed their time, knowledge, and perspectives to this important body of work. I also thank our dedicated team at QS, whose expertise, commitment, and diligent research have made this report—and the broader Global Student Flows Initiative—a valuable asset for global education communities.

Report findings

International education remains one of the most dynamic, high-impact global systems of the modern era; a powerful force that delivers shared prosperity for learners, destination markets, home countries, and employers alike. At its best, it is a win–win–win–win: for students seeking opportunity, for host nations driving innovation, for sending countries to build economic capacity, and for employers securing globally-minded talent. Now more than ever, global student mobility is not just an economic driver but a strategic lever for building resilient, knowledge-rich societies in a time of profound transformation.

Executive summary

Global student demand for international education remains robust, continuing its historical trajectory with an estimated annual growth rate of approximately 4% over this decade. By 2030, the total international student population is projected to reach approximately 8.5 million. Despite this consistent upward trend, the global student mobility landscape is marked by considerable uncertainty driven by shifting geopolitical climates, evolving economic conditions, and changing student preferences. Consequently, traditional market leaders now face heightened competition from emerging education destinations.

Between 2020 and 2025, student priorities significantly evolved, reflecting a deeper focus on outcomes and institutional reputation. Attending a leading university has become increasingly critical, with academic and employer reputation seeing increased emphasis. Students also prioritise opportunities to establish robust personal and professional networks, recognising the long-term value of strong connections. Additionally, the attractiveness of a country's culture and lifestyle has grown in importance, indicating a rising significance placed on comprehensive student experiences beyond academics alone. The general reputation of a destination as welcoming, alongside demonstrably high-quality teaching standards measured through rankings and benchmarks, further shapes student decision-making.

To navigate the uncertainty influencing global student flows, this report outlines three distinct scenarios. The first scenario, Regulated Regionalism, anticipates stricter national frameworks resulting in more concentrated regional student mobility. In this model, traditional anglophone destinations such as the US, UK, Canada, and Australia might encounter tighter enrolment restrictions, while emerging hubs, particularly in Asia and the Middle East, could significantly expand their market share.

The second scenario, Hybrid Multiversity, emphasises digitally-enabled, hybrid educational models combining local, remote, and brief international study phases. Driven by economic uncertainties and technological advancements, this scenario reflects a growing preference among students for flexible and cost-effective education pathways. Institutions capable of rapidly adapting their offerings to include robust digital and hybrid learning options are likely to thrive in this scenario.

The third scenario, Talent Race Rebound, portrays intense global competition for international students, driven by demographic pressures and acute labour shortages. Countries adopting streamlined visa processes, enhanced post-study work rights, and significant investments to attract global talent—particularly in science, technology, engineering, and mathematics (STEM) fields—are poised for substantial growth. Under this scenario, leading traditional markets such as the US, UK, Australia, and Canada could regain strong growth trajectories through proactive immigration policies and deeper industry collaboration.

Each scenario presents distinct strategic implications for institutions in major markets. In a Regulated Regionalism environment, traditional destinations might experience restricted growth due to policy and capacity constraints, prompting student flows toward new regional education centres. Under Hybrid Multiversity conditions, institutions in established markets would need to quickly shift to a flexible learning model and forge partnerships with the rapidly improving institutions in students' home markets. If the Talent Race Rebound scenario comes to pass, institutions in major markets will have to work hand in glove with governments and industry to attract talent in a competitive environment.

10 strategic questions for higher education policymakers

Ways you can strength test your education strategy

1. **Are we making a compelling national case to study here?**

   As global talent becomes more mobile and top institutions more widely distributed, the appeal of studying in a particular country cannot be taken for granted. Policymakers and institutions must collectively articulate the value of their national education ecosystem, especially if the dominance of the “big four” destination countries fades. The sector’s voice must be clear, consistent and compelling when discussing the benefits of studying in a particular country.

2. **Is our institutional reputation clearly differentiated and globally understood?**

   A reputation for academic excellence and a strong employer relevance remains a cornerstone of international student attraction. In uncertain scenarios, institutional reputation is one of the few constants that can sustain enrolments, partnerships, and long-term impact. Global standing, research leadership, alumni success and employer reputation all contribute to shaping this asset.

3. **Do we understand our true global competitor set?**

   Today’s international students are comparing institutions and programmes across continents, often evaluating courses from different countries in a single search. Institutions must build their programme value proposition in comparison to local and global peers. Strategic benchmarking and intelligence are vital to positioning programmes, setting realistic enrolment targets, and staying aligned with student expectations across multiple regions.

4. **Are we ready to compete in a higher-cost environment?**

   In a more competitive international landscape, the cost per enrolment is rising due to increased marketing, student support, and programme delivery investments. Institutions must plan for this reality. Strategic resourcing, digital efficiency, and long-term positioning will be essential to remain attractive in the global market for talent. This includes investing in services that enhance student experience, career development, and alumni networks.

5. **Is our investment in transnational education guided by long-term objectives?**

   Transnational education (TNE) should not be a reaction to short-term disruptions or an opportunistic trend. Effective TNE strategy requires a clear, multi-year vision aligned with global research collaboration, talent development, and institutional strength. Institutions must approach TNE as part of a broader commitment to building global capacity, not just extending reach. Successful TNE models often integrate complementary expertise, build mutual value, and evolve toward durable, research-rich partnerships.

6. **Have we stress-tested our investments across multiple future scenarios?**

   International education investments—from new campuses to dual-degree programmes - should be resilient under a range of market conditions. Using scenario frameworks to test assumptions around student mobility, regulatory change, and demand growth can help mitigate risk. Institutions should also explore partnerships that reduce exposure, such as shared research infrastructure or flexible, tech-enabled programme delivery. Scenario planning helps anticipate discontinuities and make informed decisions about capital allocation and partnership design.

7. **Are we aligning learning with employability outcomes and strengthening partnerships with industry?**

   Students remain focused on their futures, and employability must be embedded into curriculum design, career support, and programme delivery. Strengthening partnerships with employers—local and global—not only enhances the student experience, but also helps institutions remain aligned with labour market needs. This is especially crucial in the Talent Race Rebound scenario, where skills pipelines are directly linked to migration and workforce development policies. Demonstrating clear graduate outcomes boosts both institutional reputation and student satisfaction.

8. **Are we investing in Artificial Intelligence, digital and hybrid learning infrastructure to remain globally competitive?**

   In an environment where flexibility and cost-effectiveness are increasingly important to students, investment in artificial intelligence, digitally integrated and hybrid models of delivery is essential. These technologies and models allow institutions to scale access, personalise learning, and respond more quickly to changes in demand or disruption. AI and digital maturity are more than technology questions, instead they act as a strategic differentiator across all three scenarios outlined in this report. Institutions that can offer modular, interoperable, and globally portable learning will gain an edge.

9. **Do we have agile risk management and contingency plans for geopolitical and regulatory shocks?**

   International education is increasingly shaped by geopolitical shifts, immigration reforms, and cross-border tensions. Institutions must adopt scenario-based planning to stress-test their exposure to market-specific risks and build institutional agility. This includes rapid policy response mechanisms, diversified geographic recruitment strategies, and strong legal and operational frameworks to adapt quickly in times of uncertainty. Robust contingency planning ensures continuity for students, staff, and partners when the external environment changes suddenly.

10. **Are we building global partnerships that enhance flexibility, resilience, and reach?**

    Strategic international partnerships are increasingly critical to sustaining institutional competitiveness. Partnerships can enable joint research, programme mobility, shared infrastructure, and more agile responses to shifts in demand. In times of disruption or policy volatility, strong networks can help institutions pivot between markets, expand their footprint, and share resources. Institutions should assess the strategic value, mutual benefit, and long-term alignment of their international collaborations, rather than approaching them opportunistically.

Regulated Regionalism

Hybrid Multiversity

Talent Race Rebound

Three scenarios for 2030

This year, the Global Student Flows initiative outlines three scenarios for the shape of international education in 2030. In a period marked by rapid change and heightened uncertainty driven by geopolitical, demographic, and technological upheaval, it has become increasingly important to frame our analysis not only through data but also through the structured exploration of potential future outcomes. Scenarios allow us to codify key thematics, bring together qualitative and quantitative insights, and offer a strategic lens through which to consider the medium-term outlook.

Scenario planning is a well-established academic and strategic methodology. Rather than attempting to predict a single outcome, and supplementing our quantitative simulation of global student flows, scenarios examine the major factors shaping the future - policy, economics, technology, demographics - and how different combinations of those forces could lead to a range of plausible futures. These frameworks help decision-makers prepare for uncertainty, test their assumptions, and adapt strategies in real time as conditions evolve.

In this report, we present three distinct scenarios for 2030:

- **Regulated Regionalism**, where geopolitical fragmentation leads to strong intra-regional mobility and emerging destinations accelerate ahead.
- **Hybrid Multiversity**, a world of blended, tech-enabled models that reshape where and how students learn, featuring a strong push towards transnational campuses.
- **Talent Race Rebound**, a high-growth, globally competitive environment where nations aggressively seek international students as future citizens and workers.

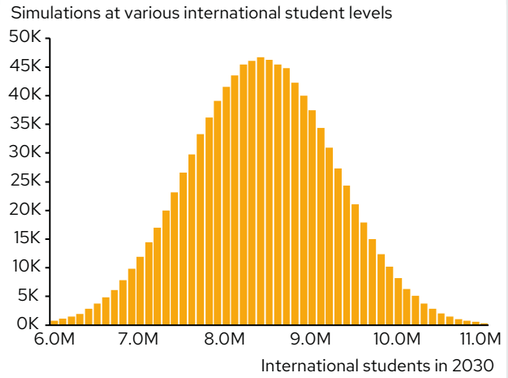
These scenarios are grounded in extensive research - expert conversations, rigorous data modelling, and live feedback gathered over the past three months at key global convenings, including NAFSA's 2025 Conference and conferences across Europe, Africa, the Asia Pacific, and the Americas.

2030 outlook

In this time of rapid global change, the Global Student Flows initiative, established in 2018, continues to accelerate its mission to map, forecast, and guide international education strategy for governments, institutions, and the broader global talent ecosystem. This year's report introduces three future scenarios for international education through to 2030, shaped by thousands of conversations with leaders across government, education, and industry, and grounded in insight from more than 70,000 students from 191 locations looking to study at 146 institutions. Together these scenarios offer a robust, evidence-based framework to navigate a sector at the intersection of geopolitics, demography, technology, and labour market transformation.

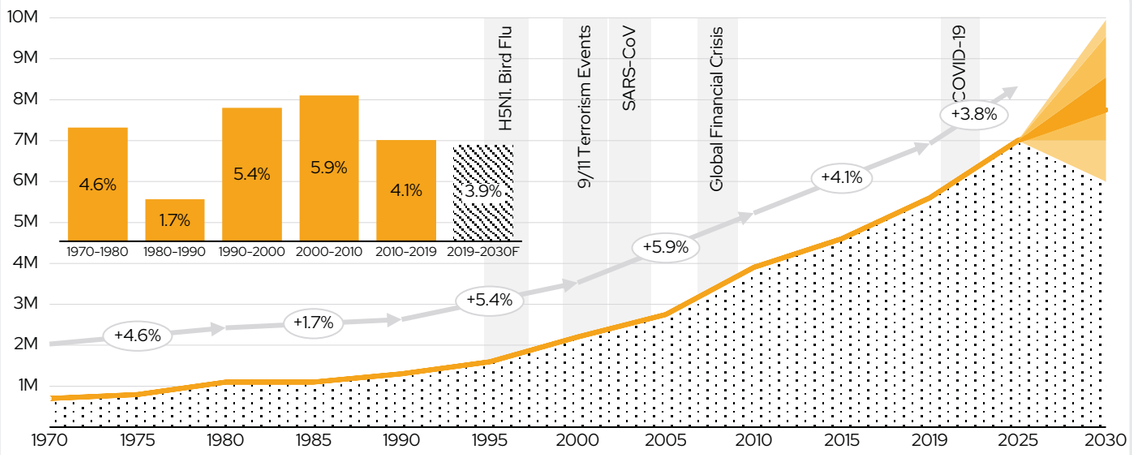
Our 2025 forecast projects approximately 8.5 million international students by 2030, representing a compound annual growth rate just below 4%, the long-term historical trajectory over the past five decades. Drawing on hundreds of expert interviews and advanced simulation analysis, we estimate a 95% confidence interval ranging from six to 10 million international students in 2030. This range reflects both plausible headwinds, such as political disruption or economic fragmentation, and tailwinds like a global race for talent or the rise of new, attractive study destinations.

Figure 1. Simulation frequency for total global international students in 2030



Source: QS, Global Student Flows, July 2025

Figure 2. Total global international students, 1970 - 2030F



Source: QS, Global Student Flows, July 2025

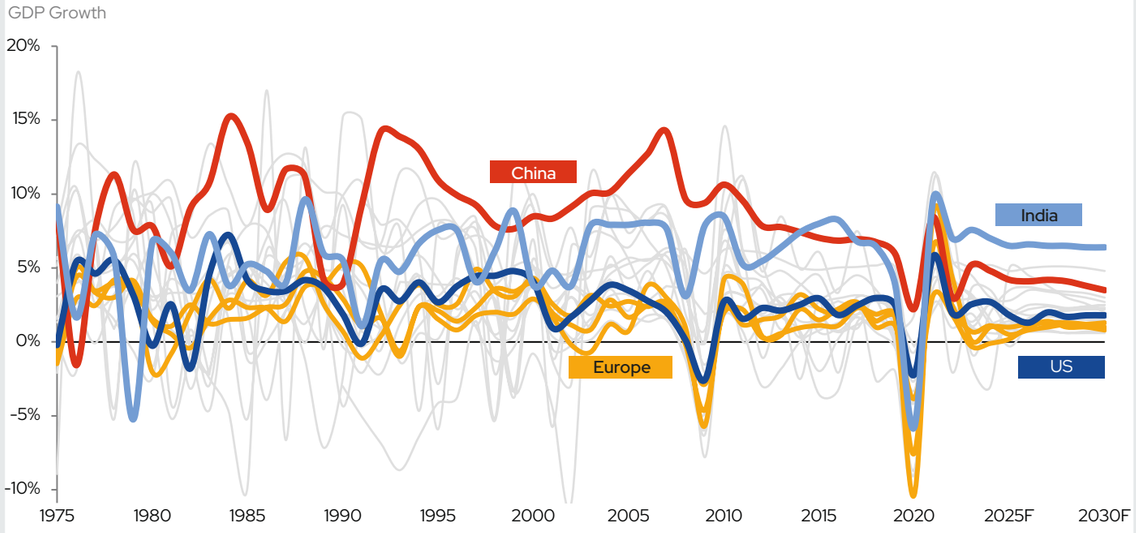
As we look ahead, it is also important to reflect back. In 1970, fewer than one million students crossed borders to pursue education. Today, more than seven million students are part of a globally connected academic ecosystem, exchanging knowledge, building relationships, and contributing to economies around the world. This dramatic expansion of international student mobility is not just a story of scale, but of strategic significance.

The evolution of global student flows reflects the evolution of the global economy. Over the past five decades, China has emerged as one of the most influential stakeholders in global education, both as a leading sender and, increasingly, as a study destination. India, with its demographic dividend and expanding middle class, continues to accelerate as a driver of outbound mobility, and is projected to shape the global student population for decades to come as more institutions from around the world seek to become part of India's domestic higher education landscape. At the same time, traditional destinations such as the United States, the United Kingdom, Canada, and Australia have experienced both growth and turbulence. Much of this stems from domestic policy shifts, immigration frameworks, and international competition. Meanwhile, emerging destinations, principally across Asia and the Middle East, are stepping onto the global stage, offering new pathways and models for student success.

The one constant across these transformations is the central role of talent. Nations and institutions that recognise the strategic importance of attracting, nurturing, and retaining global talent will be better positioned to thrive amid increasingly complex dynamics. International education stands at the heart of this equation, bridging cultures, building capacity, and empowering the next generation of leaders, researchers, and innovators.

The Global Student Flows Initiative, now in its eighth annual cycle, serves as a strategic guide for those navigating this complexity, providing not just forecasts but deep foresight into the forces shaping global education, mobility, and talent for the years to come.

Figure 3. Annual GDP growth for major and G20 economies



Source: IMF Historic GDP Growth 1975-2024, QS Forecast GDP Growth 2025-2030

International student trends

International student motivations, priorities, and applications

Decision-making priorities

Teaching quality, university reputation and lifestyle are key priorities when students are deciding on a study destination.

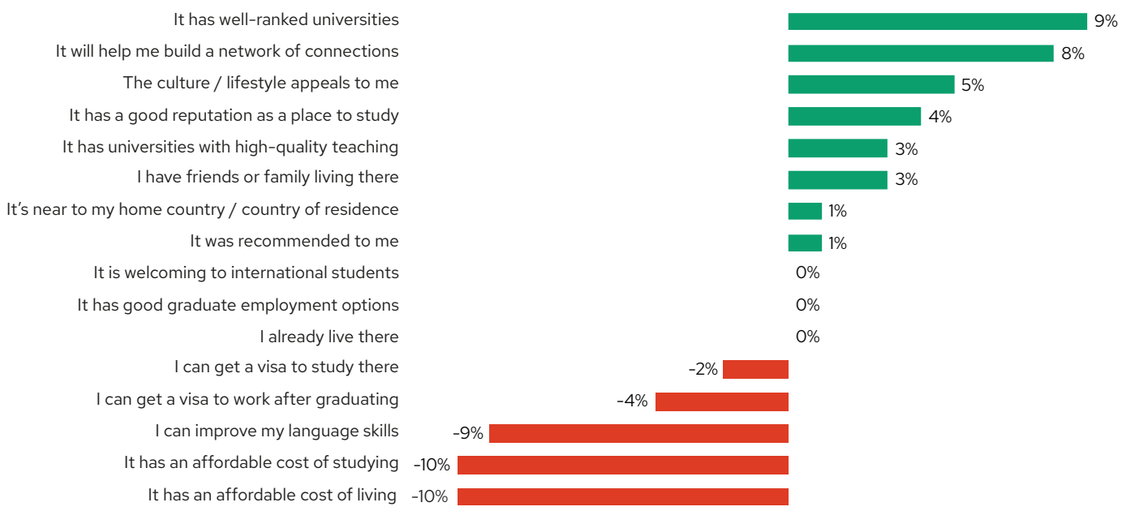
The top priorities for students when choosing a country:

1. It has universities with high-quality teaching
2. It is welcoming to international students
3. The culture or lifestyle in the country
4. It has well-ranked universities
5. It has a good reputation as a place to study

The last five years have seen institutional reputation (and therefore university ranking performance), graduate outcomes and post-graduate employment all become increasingly important to prospective students. The desire for strong post-graduate outcomes is further emphasised by their worries about studying abroad. 67% of students said cost of living was a concern; getting a job was identified as a concern by nearly 50% of respondents. Crucially, respondents want universities to help: 62% of respondents said that a university having a money advice service was very or extremely important.

Developed economies across Europe and maturing key source markets of India, Nigeria, Türkiye and Brazil have seen cost of living dropping in importance. However, if global economic growth slows as predicted, this trend may slow or reverse entirely.

Figure 4. What five things are most important to you when choosing a country to study in? % change 2020-2025



Source: QS, Global Student Flows, July 2025

Personal interest in the subject becoming less important

A student's personal interest and the passion they have for their chosen subject remains a critical component that guides their decision-making. However it's clear that learning for the sake of learning is no longer the sole driver amongst this audience. A combination of economic realities and cost of living pressures means that prospective students are increasingly prioritising their future career planning when deciding what and where to study. Whilst students would still expect that personal interest in the subject to be reciprocated by their teachers and lecturers, they would also expect their learning experience to be oriented around their future skills development and career pathways.

Globally, a personal interest in the subject used to be the most important factor when choosing a course. However its importance has declined from 61% in 2020 to 50% in 2025.

A personal interest in the subject remains important, but has made way for other priorities such as the graduate employment rate and institutional reputation. The shrinking focus on personal interest in the subject is most evident in a number of African markets, where it is increasingly necessary that personal interest must make way for a focus on return on investment through graduate outcomes and employability.

Figure 5. % of students selecting "I have a personal interest in the subject" when choosing a course

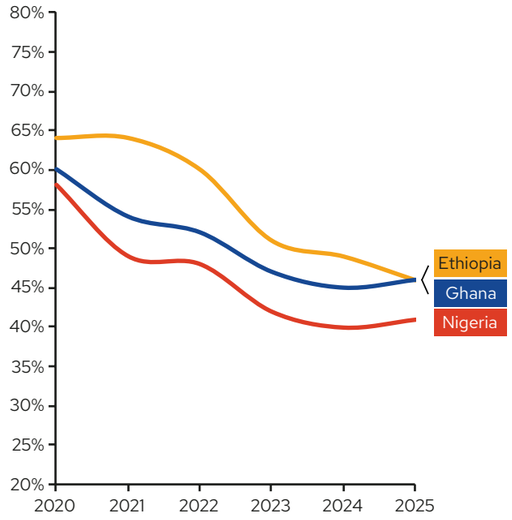
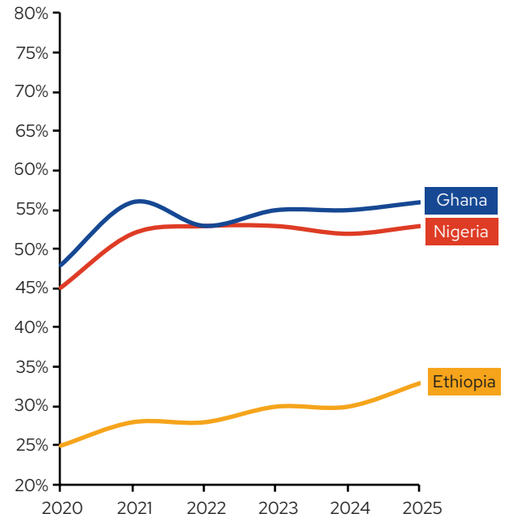


Figure 6. % of students selecting "It has a high graduate employment rate" when choosing a course



Source: QS, Global Student Flows, July 2025

Teaching quality is the most important factor for students

But how do they define it?

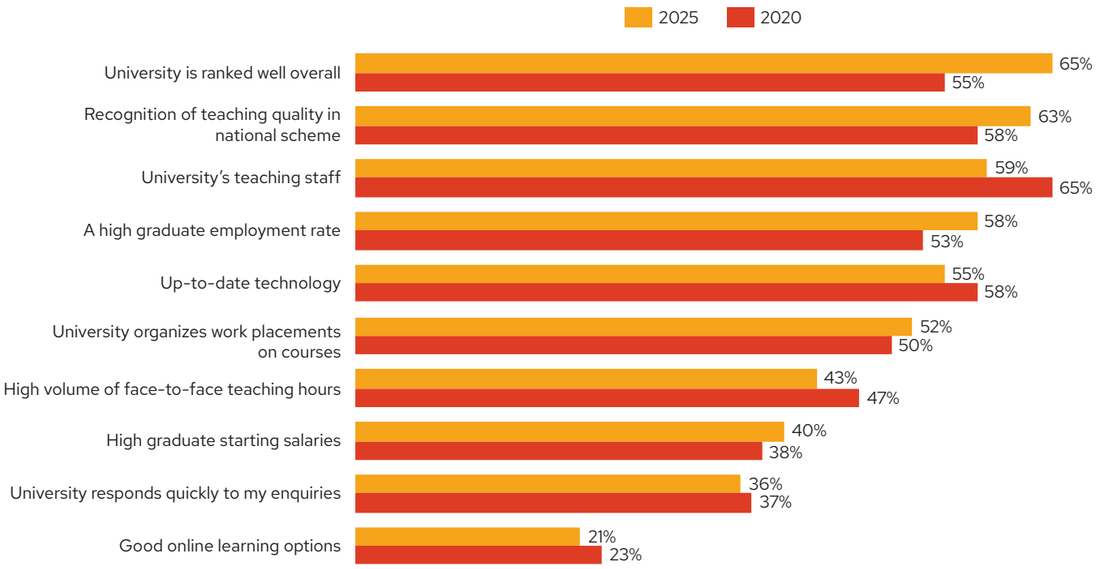
Globally, teaching quality is the most important factor when candidates make any decision about their studies. But it's important that institutions know how to articulate high-quality teaching. The International Student Survey clearly shows students don't have a single opinion on what defines good quality teaching.

Rankings are increasingly prominent. 65% of students said being well ranked is a measure of good teaching quality (up from 55% in 2020). Recognition of teaching quality via external measurement schemes has risen from 58% to 63%, and a high graduate employment rate from 53% to 58%.

The metrics students use to gauge the level of teaching quality in any given institution are evolving to be more quantifiable, benchmarkable measures. Institutions need to consider how they can create a data-driven narrative that speaks to their teaching quality for students.

Since 2020, the use of teaching staff as a measure of teaching quality has declined from 65% to 59% and having up-to-date technology has declined from 58% to 55% - reiterating that measurable indicators are increasing in importance at the expense of less tangible measures.

Figure 7. Which five factors are most important to you when assessing a university's teaching quality?



Source: QS, Global Student Flows, July 2025

Influencers of student decision making

Personal recommendations are growing in importance. Those who regard family and friends as a useful source have risen from 24% to 29%. Candidates are increasingly likely to speak to family members about their study decisions. The proportion of international students who will seek parental advice has risen from 64% to 70%, whilst those who will speak to siblings has risen from 30% to 35% since 2020. Family networks are seen as an increasingly reliable and trusted source of information when discussing where to study.

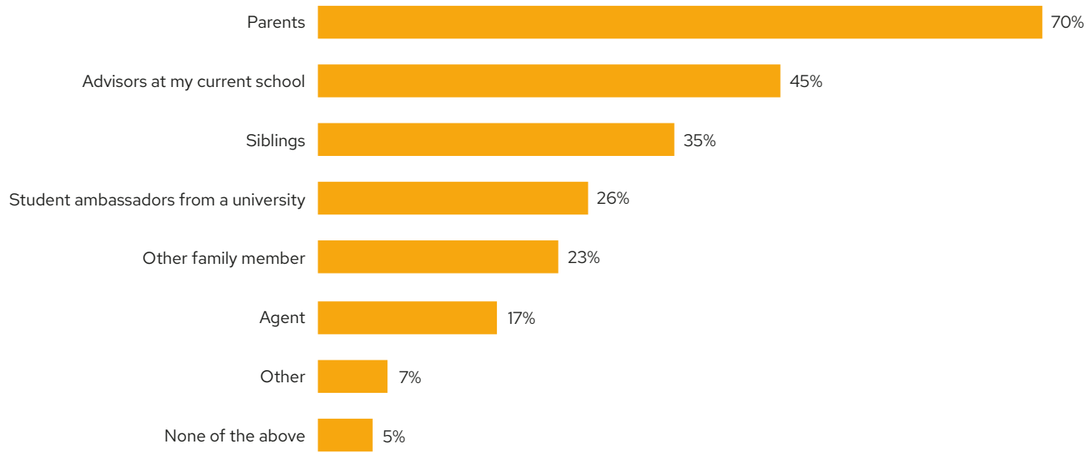
Aligned to this, the proportion who will speak to school advisors has risen from 40% to 45%, thereby reiterating the need for trusted points of view with regards to their study. University fairs remain a top five information source, with 35% citing them as useful.

Peer-to-peer recommendations command significant credibility when influencing candidate decision-making - the proportion who cite discussions with alumni as a useful information source has risen from 21% to 25% since 2020. The ability to connect with existing international students is the most desired marketing communication strand in 2025, with 49% selecting this option.

Institutions need to provide avenues for prospective students to speak with current or past students. Evidently, this sharing of information is more valued by candidates than anything they might hear from the university itself.

Other areas of focus for university communications should include information about teaching staff experience and qualifications, work placement and links to industry. Nearly half of the students think these are important information strands.

Figure 8. Have you or will you discuss your study options with any of the following:



Source: QS, Global Student Flows, July 2025

Regional trends

Student destinations

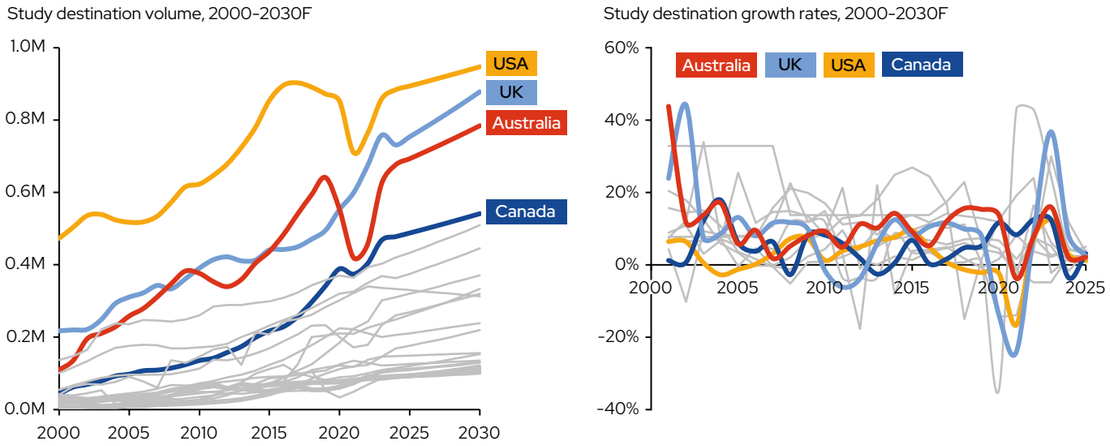
International student mobility is entering a more fragmented, policy-sensitive phase, and it's no surprise that American policy is once again influencing global student flows. While the US remains the top destination, its leadership in the market is starting to loosen. US international enrolments, excluding Optional Practical Training (OPT), the US post-study work route, peaked in 2016/17 and have yet to fully recover. Although there was a post-COVID bounce starting in 2021/22, total enrolment still trails peak levels by about 2%. Growth has slowed in the last academic cycle, and barring major policy changes, the US is on track for a further slowdown by 2030.

The UK, with post-study work rights restored and a more student-friendly government expected, is the most likely to gain the most among the big four as US growth slows. GSF modelling shows that UK student numbers are projected to approach 900,000 by 2030, up from just over 700,000 today. Australia, despite recent visa tightening and quality control measures, remains attractive for its proximity to Asia and relatively stable regulatory environment. Together with Canada, the top four study destinations are set to retain their status, but their combined market share is forecast to dip to around 35% by 2030, down from 40% a decade ago.

The top 30 destinations collectively host nearly 90% of all international student flows. Looking at projected changes among the top 15 between now and 2030, Türkiye, the UAE, Malaysia, and Japan are each forecast to climb one position, while the Netherlands is projected to drop one rank. Russia sees the most significant shift, falling three places from 7th to 10th. Safety concerns due to the ongoing conflict, along with reputational and logistical challenges, have already prompted a notable decline in student numbers in Russia.

Regions such as the Middle East and Asia are set for strong growth as they compete to become regional education hubs. India, the UAE, Saudi Arabia, Hong Kong (SAR), and South Korea are heavily investing in internationalisation, campus facilities, and English-language programmes. While growth to 2030 in these regions may slow compared to past cycles, it is still expected to outpace the global average. Potential diversification away from traditional study destinations gives them an edge, yet geopolitical instability remains a critical risk for these markets.

Figure 9. Major study destination growth, 2000-2024
Historic and 2024-2030 point estimate growth outlook



Source: QS Global Student Flows, July 2025

Figure 10. Major study destination growth rates, 2000-2024
Historic and 2024-2030 point estimate growth outlook

Source: QS Global Student Flows, July 2025

Global Student Flows models the lower and upper 95% confidence intervals in 2030 for international students in every study destination, reflecting how much student growth could vary based on current risks and conditions. A wider spread in the compound annual growth rates (CAGR) indicates greater uncertainty in a destination's outlook from now until 2030, capturing outlooks from best-case growth to potential headwinds. This is a reflection of how sensitive international students have become to unpredictability in policy and safety concerns.

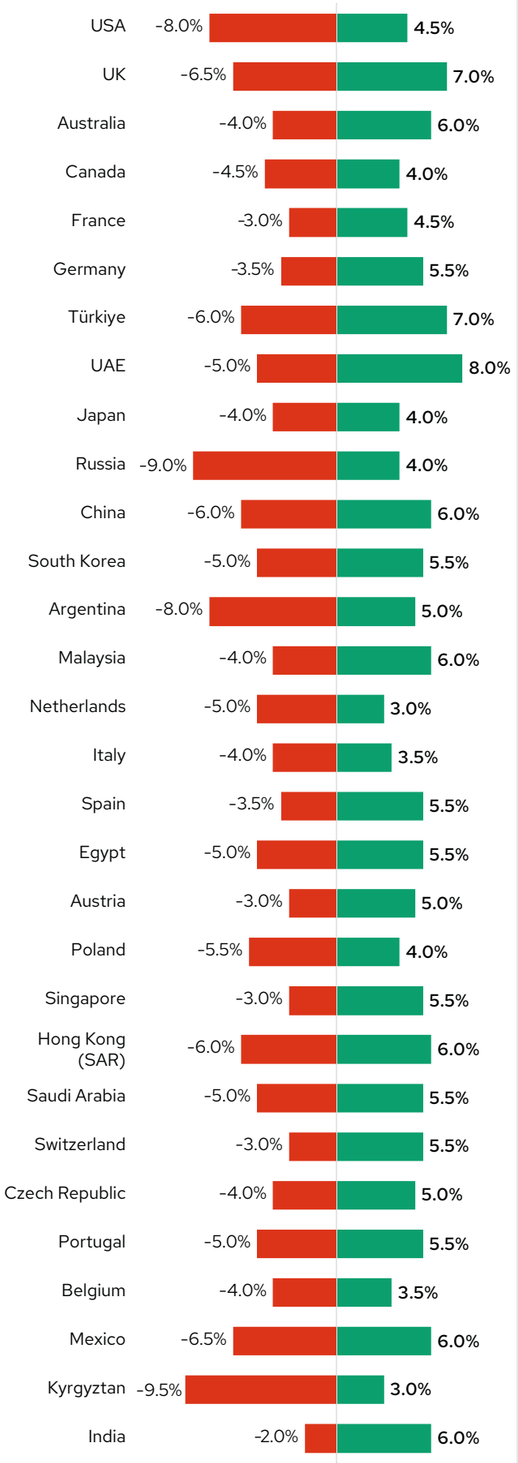
This spread is notably wide for many nations, reflecting elevated global uncertainty. Major economies like the United States, China and Russia exhibit particularly broad growth confidence intervals as a consequence of their direct exposure to geopolitical uncertainties, and, in Russia's case, ongoing conflict. Similarly, countries dealing with economic weaknesses or domestic volatility, such as Türkiye, Argentina, and Kyrgyzstan, also show wider confidence intervals. While Türkiye has potential to attract more students from the Eurasia region, the elevated risk environment gives this outlook a slightly negative bias overall.

On the other hand, many of Europe's destinations stand out with narrower confidence intervals, emerging as beneficiaries of the shift away from traditional hubs. These countries combine affordability, accessible visa frameworks, and English-taught programmes, positioning them as stable alternatives. In Asia, Japan and South Korea are set to attract a larger share of Chinese students, fuelled by cooling China-USA relations and strengthening regional academic ties.

However, momentum is set to wane for countries implementing restrictions on student inflows. Canada's caps have already demonstrably slowed growth, while the Netherlands and Poland, also tightening rules, risk losing their competitive edge.

Where immigration is politically sensitive, growth will likely soften. The global student landscape is shifting and fragmenting, with power increasingly dispersing among a broader set of study destinations.

Figure 11. Major study destination growth outlook. Lower and upper 95% confidence intervals 2024-2030F



Source: QS Global Student Flows, July 2025

Student origins

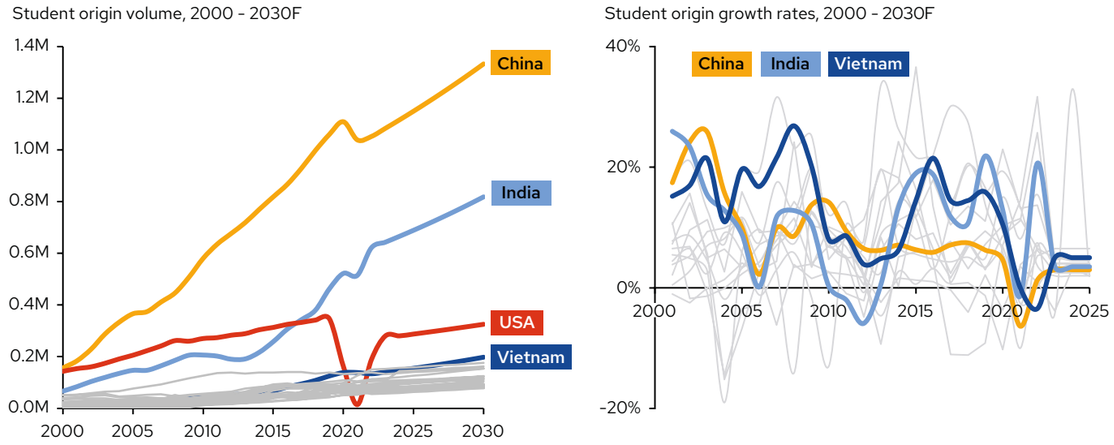
The global supply of international students is set to grow over the next five years, but not evenly. The number of outbound students will be shaped by domestic economic performance, demographics, policy shifts at home and abroad, and geopolitical developments. Countries with rising middle classes and relatively stable economic growth are expected to see increasing outbound student numbers. Vietnam and Indonesia stand out in this regard. Both have young populations, improving income levels, and underdeveloped domestic higher education capacity. They are already among the top 20 source countries, and they are projected to climb further in the ranks by 2030. These students tend to favour destinations like Japan and increasingly Europe, where visa openness and affordability are becoming key attractors.

India is expected to remain one of the top sources of outbound students globally, with an expected long-term annual growth of over 3%. While the Indian government has made it a priority to build up domestic higher education capacity, most notably under the National Education Policy, demand still far exceeds supply, particularly in STEM and postgraduate programmes. India's population continues to grow and urbanise, fuelling demand for quality education and international credentials. However, outbound growth may slow slightly as Indian institutions scale up and more international branch campuses open within the country.

On the African continent, Cameroon and Morocco are expected to send more students abroad, particularly to destinations that have adopted pro-student policies, such as the UK and France. These countries have scholarship programmes and work pathways with European countries that are likely to boost student flows.

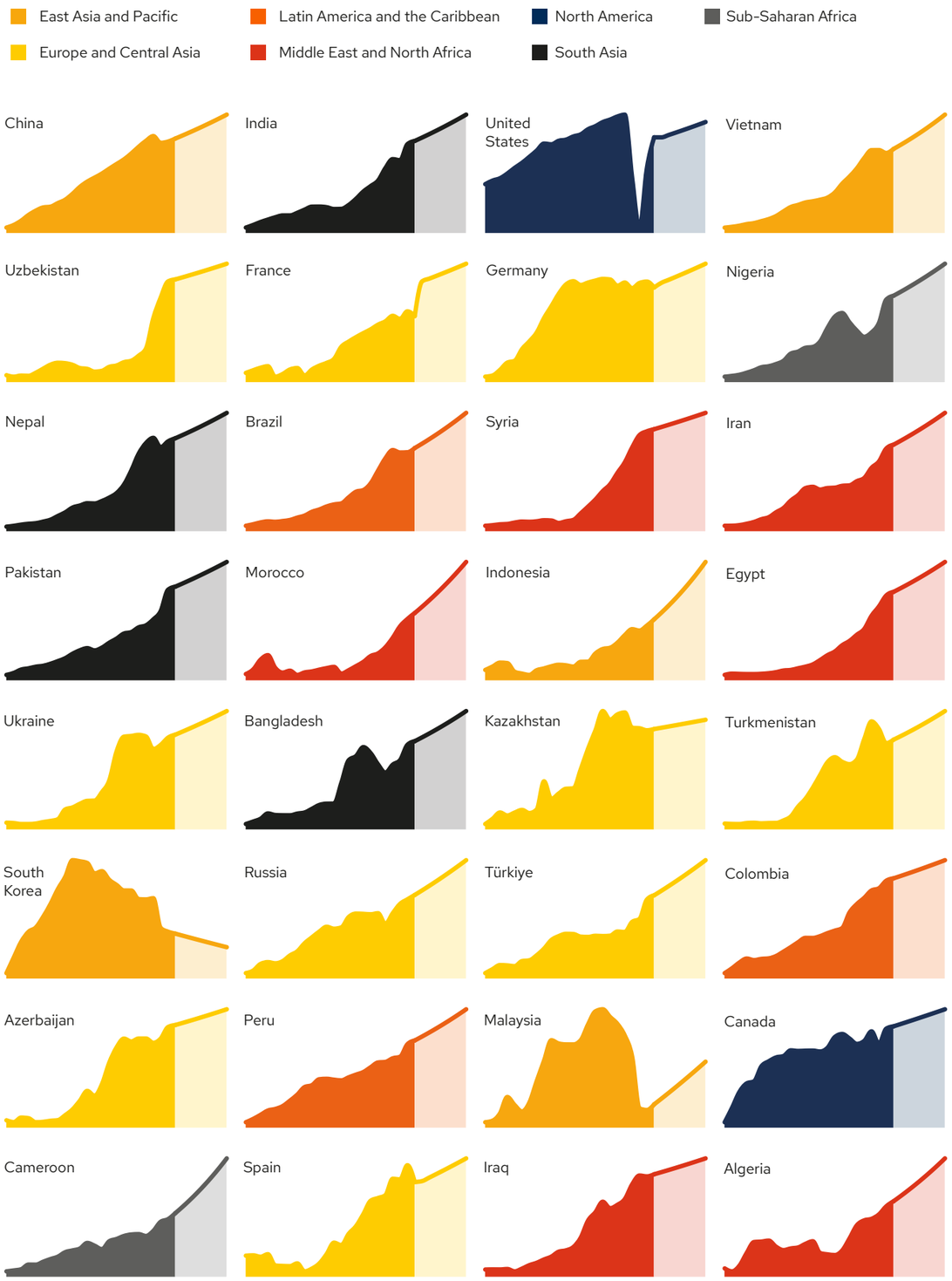
Nigeria has strong potential for outbound student flows. It has one of the most favourable demographic profiles globally, with a fast-growing youth population (23% growth in 18-25 year-olds between now and 2030). However, its persistent economic instability adds a layer of financial risk for outbound students. As a result, while Nigeria is projected to see relatively strong outbound growth in the most likely scenario (4% growth in student numbers), it also has a wider band of possible outcomes. Much depends on how its economy stabilises and whether destination countries continue to offer flexible visas and work policies.

Figure 12. Major student origin growth, 2000-2024 Historic and 2024-2030 point estimate growth outlook



Source: QS Global Student Flows, July 2025

Figure 13. Major student origin growth rates, 2000-2024 Historic and 2024-2030 point estimate growth outlook



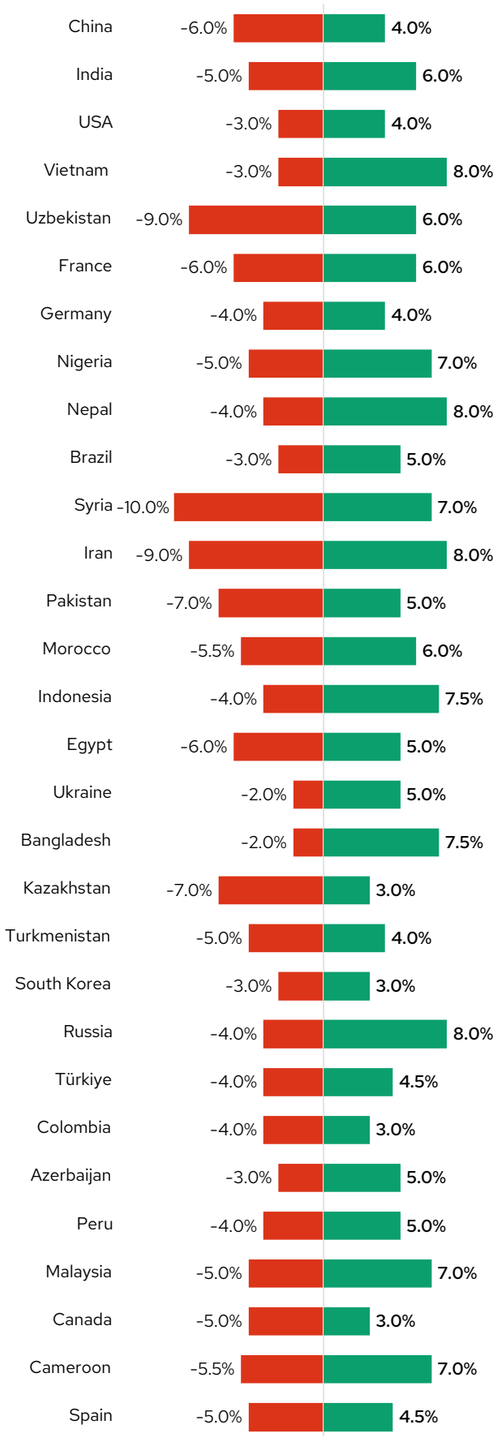
Source: QS Global Student Flows, July 2025

China's role as a leading sender of international students is facing a slow, structural shift. Economic uncertainty at home, growing cost sensitivity among families, and geopolitical frictions with traditional destination countries - especially the US, Australia, and the UK - are pushing many to look elsewhere or stay within China. In parallel, the Chinese government is investing heavily in domestic universities and promoting local alternatives. While China will remain a major player, its growth trajectory is expected to flatten or slow in this period.

South Korea, meanwhile, is seeing a sharp and steady population decline, with an 8% decline in students aged 18-25 years between now and 2030. This has led to a consistent fall in outbound student numbers, with South Korea seeing outbound declines in all but two years from 2010 to 2022. This pattern is unlikely to reverse in any meaningful way, and South Korea is projected to slip eight spots, falling to 22nd place among source countries by 2030.

Several countries affected by conflict or sanctions - such as Syria, Iraq, and Iran - remain significant sources of international students as well. These students often leave in search of stability, safety, and better opportunities. However, outbound flows from these countries are difficult to forecast reliably. Sanctions, economic collapse, and visa restrictions can rapidly alter the landscape. Iran, for instance, sits at a crossroads with sanctions and domestic pressure pushing students outward, but restrictions can limit how many actually succeed in leaving. For these states, forecasts carry a high degree of uncertainty, with outcomes highly dependent on external policy shifts and internal stability.

Figure 14. Major student origin growth outlook. Lower and upper 95% confidence intervals 2024-2030F



Source: QS Global Student Flows, July 2025

Global Student Cities

Global student mobility is increasingly shaped by cities as much as by countries. Cities are where students reside, study, work, and build social and professional networks. They serve as the foundation for word-of-mouth influence, the formation of diaspora communities, and the development of institutional capacity. In practice, institutions do not recruit from “India” as a single unit; they engage with hundreds of distinct urban centres, each with its own demographic structure, infrastructure realities, industrial priorities, and cultural dynamics.

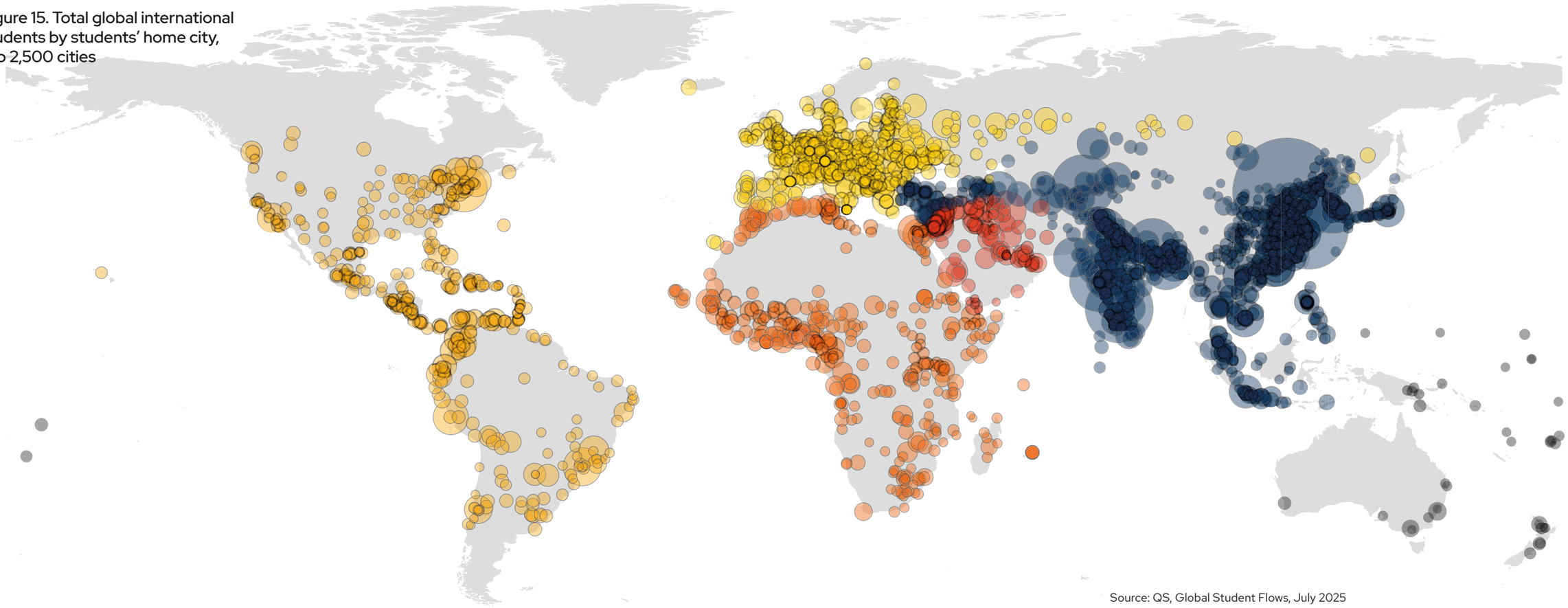
In recognition of this, QS is progressively expanding its Global Student Flows analytics from a traditional country-to-country matrix to a more granular city-to-city framework.

Building on the QS Best Student Cities ranking, our expanded dataset now includes over 2,500 cities worldwide, capturing more than 95% of international student origin and destination flows. The dataset encompasses every global city with a population exceeding 250,000, as well as a minimum of five cities for smaller countries. It also includes every city associated with the 7,000 institutions assessed in the QS World University Rankings. This refined approach reveals critical patterns often obscured at the national level, enabling distinctions between global megacities, regional gateways, and emerging urban education hubs. These urban nodes are increasingly central to the dynamics of global student mobility.

The map below visualises this expanded dataset, illustrating the global source cities capturing more than 95% of today’s 7 million plus international students. It highlights, for example, rising talent centres in second-tier Chinese cities, innovation-led Gulf destinations, and African metropolises positioned to enter the global top 50 by 2030.

As competition intensifies and infrastructure pressures grow, city-level intelligence is essential. QS Cities Intelligence provides governments, institutions, and investors with the insights necessary to develop agile, targeted, and inclusive strategies for the future of international education.

Figure 15. Total global international students by students’ home city, top 2,500 cities



Source: QS, Global Student Flows, July 2025

The three scenarios for 2030

Regulated Regionalism

Regulated Regionalism describes a scenario in which international education becomes more regionally distributed and governed by formal national frameworks. In this model, major anglophone destinations - such as Canada, Australia, and the UK - implement structured policies to manage international student enrolments through transparent, annually reviewed thresholds and controls. These thresholds are calibrated against factors such as housing availability, institutional support capacity, and national or regional labour market priorities. Institutions are required to demonstrate their ability to support students and deliver programmes aligned with identified skills needs in order to secure allocations.

While demand for international education continues to grow, student mobility becomes increasingly intra-regional. Students from South Asia, West Asia, and Sub-Saharan Africa increasingly opt for high-quality providers within their own regions or in nearby countries. Governments such as India, the United Arab Emirates, Malaysia, Saudi Arabia, and across Central Asia invest heavily in higher education infrastructure, attracting international branch campuses and promoting transnational education partnerships. These developments are supported by the expansion of credit recognition frameworks and multilateral agreements that allow flexible, modular pathways across institutions and borders.

This more distributed model of international education reduces the financial burden on families, shortens travel distances, and offers a hybrid experience - blending regional study with global credentials. For destination governments, it eases pressure on housing and services while ensuring that incoming students are concentrated in sectors of strategic value.

Ultimately, Regulated Regionalism advocates a balanced and managed approach to international mobility - one that retains academic quality and relevance while responding to national capacities and regional opportunity structures.

Hybrid Multiversity

Hybrid Multiversity envisions a future in which international education is delivered through coordinated, multi-site models that blend online, local, and global learning experiences. In this scenario, many students complete a substantial portion of their degree, often up to half, within their home country or region, either online or through a local partner institution. Shorter, structured periods of study abroad remain a central feature of the experience, focused on activities that benefit most from in-person engagement, such as internships and experiential learning, laboratory work, clinical training, language immersion, and professional networking.

Universities across regions develop common credit-transfer systems, harmonised curricula, and shared quality assurance standards to ensure seamless academic progression. Faculties collaborate across borders to align learning outcomes, assessment schedules, and moderation processes, enabling students to move between delivery sites with minimal disruption. The physical campus is repositioned as a specialised learning environment, prioritising facilities and experiences that cannot be easily replicated online, such as wet labs, design studios, and workplace-integrated learning.

Career development is embedded from the beginning. Micro-credentials earned during the home phase are formally integrated into academic transcripts, providing employers with early visibility of student competencies. Many programmes incorporate remote internships during the early years of study and require in-person placements during the global phase, supporting transitions to graduate employment. Policymakers facilitate this model by simplifying mobility pathways, streamlining visa processes, and recognising hybrid and online components for the purposes of post-study work.

Hybrid Multiversity advocates a more flexible, cost-effective, and coordinated form of international education - anchored in quality and global relevance while responding to evolving student needs, institutional capacity, and labour market expectations.

Talent Race Rebound

Talent Race Rebound outlines a scenario in which international education re-emerges as a central mechanism for attracting global talent in response to structural workforce shortages and demographic pressures. By 2030, major destination countries - including the United States, UK, Canada, and Australia - have implemented proactive policy shifts to address skills gaps in fields such as artificial intelligence, cyber and quantum technology, advanced manufacturing, biotech and healthcare and energy and agricultural innovation. Intake caps and administrative constraints that characterised the mid-2020s have been replaced by more efficient, student-centred systems. Visa approvals are processed within weeks, and extended post-study work rights, particularly in high-demand STEM disciplines, are now explicitly linked to structured, points-based migration pathways.

In this context, universities operate in deeper alignment with government and industry. Publicly funded national scholarships target priority fields, while private-sector partners co-invest in graduate internships and offer guaranteed employment outcomes. Research ecosystems are reinvigorated by multi-year public grants, upgrades to research infrastructure, and recruitment of globally recognised faculty, enhancing institutional attractiveness and capability.

Infrastructure constraints, particularly around housing, are addressed through coordinated investment strategies, including public-private partnerships in regional cities. This supports both increased enrolment and a more balanced geographic distribution of students.

For international learners, the proposition is compelling: a full-degree, on-campus experience that offers access to world-class academic environments, robust professional networks, and a credible path to long-term employment and residency. Families increasingly view the investment as a gateway to opportunity, and application volumes from larger emerging markets - such as India, Nigeria, Indonesia, and Brazil - rise sharply. International education, once primarily seen through the lens of cultural diplomacy, is now a key strategic lever in the global competition for human capital.

Push factors

Push factors	Regulated Regionalism	Hybrid Multiversity	Talent Race Rebound
Demographics	Ageing populations in developed nations reduce domestic student growth, but strict enrolment caps limit international intake. Youth-rich regions - South Asia, Africa - drive demand, fuelling regional hubs and cross-border capacity-building within emerging markets.	Population growth in emerging economies creates surging demand for flexible, affordable education models. Hybrid delivery enables broader participation, especially for students constrained by geography, income, or family obligations in high-growth youth populations.	Shrinking working-age populations in advanced economies trigger aggressive recruitment of international students. Immigration-linked education becomes central to replenishing labour forces, with demand surging from India, Nigeria, Indonesia, and other youthful source countries.
Economic conditions	Economic pressures and infrastructure constraints lead to tighter enrolment controls in major destinations. Regional powers invest in education as an economic strategy, stimulating local growth through domestic capacity and cross-border partnerships.	Global economic uncertainty drives demand for cost-efficient models. Institutions adapt to serve budget-conscious students and diversify revenue streams, while education hubs in emerging markets grow through tech-enabled delivery and mobility pathways.	High-income nations compete for international students to fuel innovation and fill labour shortages. Strong economic growth underpins scholarships, research funding, and infrastructure investment, reinforcing the education sector as a national growth driver.
Loans & scholarships	National governments tie scholarships to priority sectors and regional labour needs. Loan access is limited for international study, prompting families to favour regional institutions and lower-cost, partially domestic education pathways.	Flexible hybrid models reduce total cost, easing financial barriers. Micro-credential funding expands, while scholarships increasingly cover online and blended formats. Local governments subsidise home-country study phases to build domestic capacity.	Generous scholarships and loan schemes target high-demand fields, often bundled with work visas and residency incentives. Host nations and industries co-fund tuition, positioning education as a strategic talent acquisition tool.
Domestic alternatives	Domestic and regional institutions expand capacity with government support. Branch campuses, international partnerships, and regional hubs offer global curricula locally, making domestic options more attractive amid limited outbound opportunities.	Blended models blur domestic and international boundaries. Students begin degrees at home via partner campuses or online platforms, accessing global credentials without leaving the country. Cost and flexibility drive uptake.	Full overseas degrees regain appeal due to strong migration pathways. Domestic alternatives struggle to compete, though top national universities align with global standards to retain talent and attract inbound students.
Risk factors	Geopolitical tensions, climate disruptions, and migration pressures drive stricter regulation of mobility. Nations prioritise stability and control, directing students toward trusted regional partners and minimising exposure to volatile global dynamics.	Hybrid delivery offers resilience amid rising risks. Political instability, climate events, and health emergencies are mitigated through flexible learning modes, allowing continuity of education across physical and digital infrastructures.	Global competition for talent overshadows risk aversion. Destination countries absorb higher exposure to political and climate risks in exchange for long-term human capital. Secure, well-governed systems become strategic recruitment advantages.

Pull factors

Pull Factors	Regulated Regionalism	Hybrid Multiversity	Talent Race Rebound
Academic quality	Quality assurance becomes more standardised within regions. Regional hubs elevate academic standards through partnerships and faculty exchanges, maintaining credibility. Teaching excellence is linked to relevance, employability, and alignment with national priorities	Academic quality is assured through harmonised curricula, shared assessment frameworks, and joint faculty oversight across institutions. Innovations in online pedagogy and modular delivery enhance teaching quality while preserving global learning standards.	Top institutions reinvest in research, teaching infrastructure, and global faculty recruitment. On-campus academic quality becomes a key competitive edge, reinforced by employer-aligned curricula and experiential learning that accelerates graduate employability.
Post-graduation prospects	Work rights are tightly linked to national labour shortages and regional priorities. Quotas and eligibility vary by sector and region, limiting universal access but supporting targeted employment pathways in high-need areas.	Students earn post-study work rights through modular global experiences. Online and hybrid study phases are increasingly recognised for eligibility. Work-integrated learning is embedded, but access varies by destination and delivery mode.	Generous, streamlined post-study work rights are central to national talent strategies. STEM and high-need fields receive extended access, often directly linked to permanent residency, making study destinations gateways to long-term employment.
Affordability (inc. FX)	Affordability drives students toward regional options with lower tuition, living costs, and favourable FX rates. Government caps stabilise fees. Regional currencies reduce volatility compared to high-cost, long-haul destinations.	Blended models reduce total cost by minimising time abroad and housing expenses. Local currency tuition and online delivery limit FX exposure. Students prioritise value, flexibility, and return on investment.	Tuition and living costs remain high, but scholarships, work rights, and strong post-study earnings offset financial barriers. Currency volatility is tolerated in exchange for career prospects and migration opportunities.
Recruitment infrastructure	Recruitment becomes regionally focused, with tighter compliance and quota-based approvals. Destination countries strengthen partnerships with regional agents, hubs, and governments, prioritising transparency, workforce alignment, and capacity-led growth over volume.	Recruitment adapts to promote hybrid pathways, emphasising local partners, digital outreach, and stackable credentials. Destination countries invest in platform-based recruitment, ecosystem partnerships, and scalable infrastructure to support distributed enrolment.	Global recruitment intensifies, driven by government-university coordination and national branding campaigns. Countries expand agent networks, streamline digital channels, and deploy talent attachés to attract high-potential students aligned with economic priorities.
Safety and security	Mobility concentrates in politically stable, regionally trusted destinations. Governments prioritise student welfare through regulatory frameworks. Safety concerns drive preference for nearby hubs with familiar cultures, legal protections, and family proximity.	Reduced travel and shorter overseas stays lower exposure to safety risks. Institutions invest in virtual safeguarding and local partnerships. Safety becomes a feature of hybrid design, not just physical presence.	As global competition increases, destinations elevate safety standards to attract talent. Enhanced housing, transport, and legal protections are emphasised. High-profile safety incidents spark rapid policy responses and community engagement.

Disruption factors

Disruption factors	Regulated Regionalism	Hybrid Multiversity	Talent Race Rebound
Geopolitical factors	Fragmented geopolitics drive regional blocs and limit global student flows. National security concerns and bilateral tensions shape policy. Mobility concentrates in politically aligned regions with reciprocal agreements and shared frameworks	Geopolitical uncertainty accelerates demand for flexible delivery. Institutions mitigate exposure by diversifying partners and campuses. Students avoid volatile regions, favouring multi-site models that offer stability regardless of international tensions.	Strategic competition reshapes student mobility as talent becomes a geopolitical asset. Education is integrated into foreign policy. Destinations offer favourable conditions to outcompete rivals and strengthen global influence through soft power.
Place-based risks	Governments impose stricter border controls and enrolment conditions to mitigate health risks. Students favour regional mobility with rapid-response health protocols. Institutions prioritise resilience through decentralised campuses and localised contingency planning.	Hybrid models thrive under recurring disruption. Institutions embed online readiness and modular delivery. Students navigate uncertainty with minimal interruption, supported by remote learning, distributed campuses, and reduced dependency on physical relocation.	Despite ongoing risks, destination countries maintain open systems to attract talent. Enhanced health infrastructure and crisis protocols reassure students. Short-term disruptions are tolerated in pursuit of long-term migration and career goals.
Capacity constraints	Student intake is explicitly tied to housing, infrastructure, and support service capacity. Governments manage institutional growth through enrolment caps, encouraging investment in regional expansion and partnerships to distribute demand more evenly.	Hybrid delivery models relieve pressure on physical infrastructure. Institutions scale through online platforms, local partners, and modular pathways. Capacity becomes more flexible, with digital tools extending access without overburdening campuses.	Rapid growth strains housing, transport, and campus facilities. Public-private investments target expansion, especially in secondary cities. Capacity planning becomes a national priority as countries compete to accommodate rising international demand.
Hybrid programmes	Hybrid programmes support regional delivery goals, enabling students to begin studies locally and transfer under managed mobility schemes. Governments endorse models that reduce pressure on infrastructure while maintaining academic continuity.	Hybrid delivery is central to this scenario. Institutions design coordinated, multi-site programmes blending online, local, and international components. Flexibility, affordability, and global access define the new standard in programme design.	While demand centres on full on-campus experiences, hybrid offerings persist for early-stage or working learners. Institutions integrate hybrid flexibility into select programmes but prioritise immersive formats aligned with migration and employment pathways.
Online learning	Online learning complements regional delivery, supporting early-stage coursework and expanding access without triggering infrastructure strain. Governments endorse online components within national quality frameworks to balance accessibility and control.	Online learning is foundational, enabling flexible, cost-effective, and scalable delivery. Institutions invest in high-quality digital platforms, credentialing systems, and pedagogy, making online study a credible and integrated part of global degrees.	Online learning plays a secondary role, supporting foundation programmes and lifelong learning. Students prioritise on-campus experiences tied to work and migration outcomes, though online remains a tool for global reach.

Regulated Regionalism

The Regulated Regionalism scenario imagines a near future in which international education becomes more geographically distributed and formally governed. Major anglophone destinations, most notably the UK, Canada, and Australia, adopt strict national frameworks that allocate international student enrolments based on capacity thresholds. These thresholds, adjusted annually, reflect available housing, institutional infrastructure, and alignment with labour market needs. Universities are required not only to demonstrate their readiness to accommodate incoming students but also to prove that the programmes on offer address specific skill shortages and national priorities. This policy environment transforms international education from a largely market-driven system into a regulated mechanism of economic and workforce planning.

Rather than suppressing demand, these restrictions redirect student flows. Students in South Asia, West Asia, and Sub-Saharan Africa increasingly turn to providers within their own regions. National governments, from India to Saudi Arabia to Uzbekistan, step in to meet this rising demand by investing in domestic higher education systems, building new institutions, funding international branch campuses, and facilitating regional academic partnerships. Credit transfer agreements and mutual recognition of qualifications enable modular pathways that blend local study with global credentials.

For families, the benefits are clear: reduced travel costs, greater proximity, and improved access. For governments, it relieves pressure on housing markets while channelling international students into sectors of high national value. Regulated Regionalism does not signal the decline of international education, but rather its rebalancing - one that privileges regional equity, state oversight, and structured cross-border cooperation over the laissez-faire globalism of prior decades.

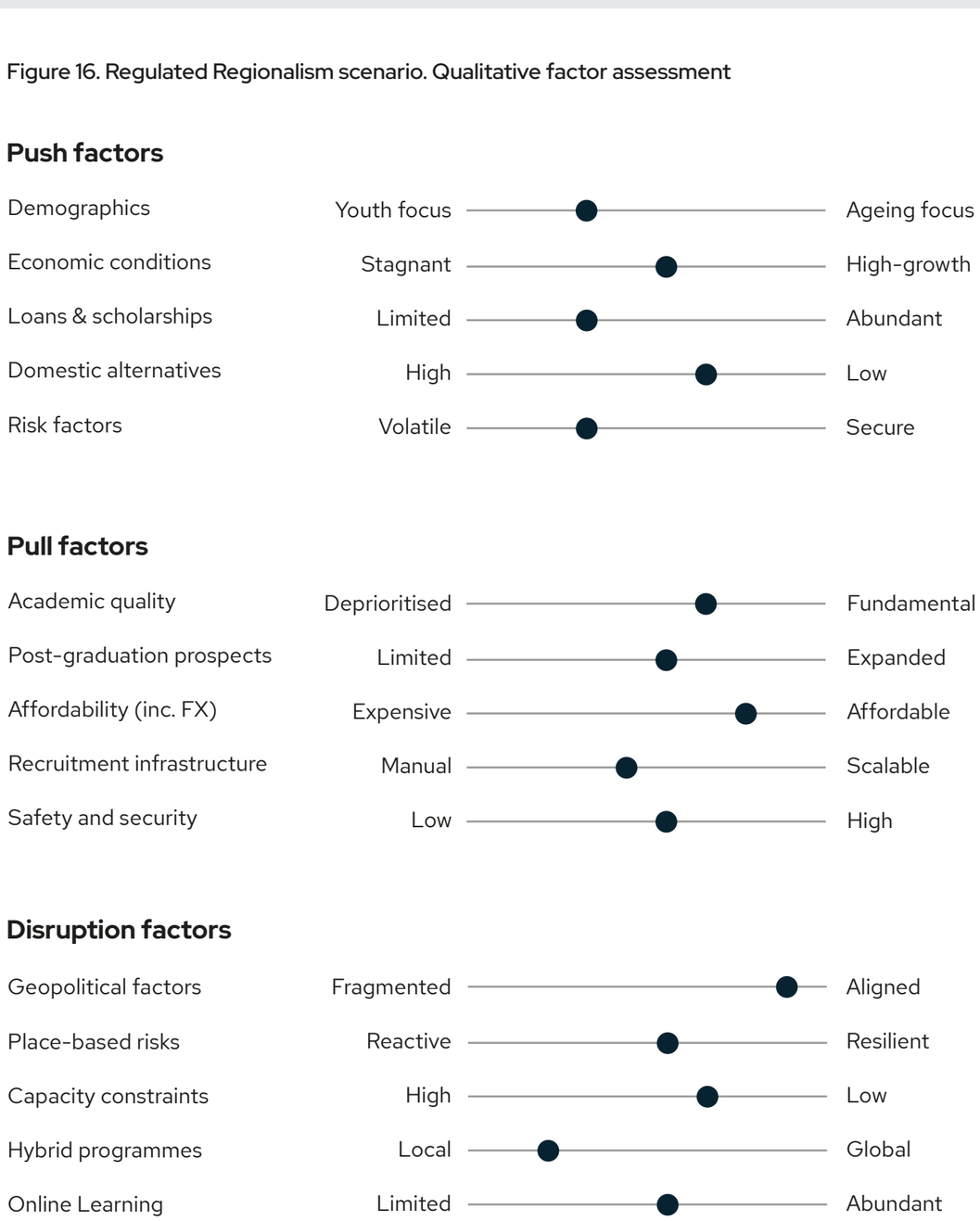
Push factors

In the Regulated Regionalism scenario, push factors driving outbound student mobility remain strong, but they are increasingly redirected within regional boundaries. Demographic momentum in South Asia and Sub-Saharan Africa, where youth populations continue to grow rapidly, contrasts sharply with ageing societies in the developed world. The resulting imbalance reinforces the Global South as a powerful engine of demand, even as traditional host countries restrict inbound flows through policy-imposed ceilings and public pressure to limit migration.

Economic pressures add further complexity. In high-income destinations, economic constraints and rising infrastructure costs lead to conservative student intake policies. In contrast, emerging economies are leveraging education as a growth sector, investing heavily in campus infrastructure, faculty capacity, and research capabilities. Countries such as India, the United Arab Emirates (UAE) and Malaysia are positioning higher education not only as a domestic priority but as an export sector, creating regional hubs designed to absorb displaced international demand.

Access to scholarships and affordable financing also shifts the equation. Where international student loans and government scholarships are increasingly tied to national workforce needs, many students find better support in nearby, government-backed institutions. Domestic alternatives, previously perceived as second-tier, are gaining credibility through global affiliations and competitive offerings. In this context, risk perception plays a pivotal role. Students and families weigh geopolitical volatility, climate exposure, and security concerns, opting for safer, nearer destinations that offer comparable academic experiences without the uncertainty of long-haul migration. Thus, push factors are not diminished, but their geographic expression is reshaped to favour regional over global mobility.

Figure 16. Regulated Regionalism scenario. Qualitative factor assessment



Pull factors

The concept of destination attractiveness is undergoing a fundamental shift in the Regulated Regionalism scenario. No longer dominated by the traditional anglophone giants, the global education landscape is redefined by a rise in regionally aligned hubs. Pull factors, once centred on global rankings and liberal post-study work rights, are now refracted through the lens of capacity, affordability, and regional accessibility.

Academic quality remains paramount, but its definition broadens. Regional hubs improve credibility by standardising quality assurance mechanisms and investing in international partnerships. Institutions in the UAE, Saudi Arabia, and Malaysia increase collaboration with globally ranked universities, co-delivering degrees, and integrating visiting faculty. These efforts reinforce academic legitimacy while reducing the need for students to relocate internationally for the entirety of their programme.

Affordability takes centre stage. As tuition caps and currency stability become strategic levers, regional destinations attract students by offering lower living costs and reduced exposure to foreign exchange risk. Governments align fee structures with cost-of-living benchmarks, positioning affordability not as a compromise but as a competitive strength. Meanwhile, visa policies and employment opportunities are shaped by national interests. Post-study work rights are tightly linked to skills shortages, offering targeted pathways rather than universal access.

Recruitment strategies shift accordingly. Institutions build deep regional agent networks, strengthen compliance, and focus on workforce alignment. Safety and student wellbeing reinforce this reorientation: students increasingly favour destinations that feel familiar, culturally proximate, and institutionally secure. The result is a more distributed but still aspirational model of student mobility.

Disruption factors

The Regulated Regionalism scenario is, at its core, a response to systemic disruptions - geopolitical fragmentation, public health crises, climate risk, and infrastructure bottlenecks. In this environment, governments, rather than institutions, become the principal architects of international education policy, using regulation to stabilise flows and mitigate risk.

Geopolitically, the world is characterised by competing blocs rather than an integrated global system. Rising tensions and declining multilateralism fragment long-standing academic corridors. Bilateral agreements and regional coalitions replace open-border models, concentrating student flows within politically and economically aligned zones. Students increasingly choose destinations where regulatory certainty, diplomatic stability, and shared cultural norms reduce the likelihood of sudden policy reversals.

Pandemic preparedness and place-based risk management have also become permanent features of education strategy. Mobility corridors are calibrated to public health protocols, with contingency plans built into academic calendars. Decentralised models, such as regional campuses, hybrid study options, and remote onboarding, allow institutions to adapt in response to disruptions without halting mobility entirely.

Capacity constraints are institutionalised as policy variables. Enrolment ceilings are linked to housing, transport, and support infrastructure, driving public investment in satellite campuses and student accommodation in secondary cities. Hybrid programmes further alleviate pressure by enabling local and digital entry points, smoothing transitions across systems. Online learning, once a stopgap, becomes a strategic asset, integrated within regulated frameworks to extend reach without compromising oversight.

Together, these disruptions act not as destabilising shocks but as structural forces reshaping the geography of international education into a more managed, regionalised, and resilient system.

Hybrid Multiversity

Hybrid Multiversity

The Hybrid Multiversity scenario reflects a structural shift in international education from long-term physical mobility to modular, distributed, and digitally-enabled learning models. In this future, international education is no longer defined by a three or four-year stay abroad, but by a carefully sequenced blend of online, local, and global experiences. Students complete much of their degree, often up to half, in their home country or region, either through local partner institutions or fully online platforms. They then undertake one or two short but high-impact mobility windows abroad, focused on internships, laboratory work, or professional networking.

This model reflects the growing imperative for flexibility in the face of economic, political, and infrastructural constraints. Universities respond by forming transnational networks that harmonise academic standards and enable seamless credit transfer. Quality assurance systems evolve to support modular and hybrid formats. Rather than treating online learning as a substitute or contingency, institutions integrate it into the formal structure of degrees, delivering foundational coursework virtually and reserving campus-based experiences for activities that require physical presence.

Career development is embedded from the outset. Micro-credentials earned in the early stages of study are transcript-integrated and employer-visible, enhancing student employability. Governments and regulators adapt by recognising hybrid formats for visa eligibility and post-study work rights. In doing so, they support a more equitable and efficient global education system - one that prioritises outcomes, cost-effectiveness, and resilience over physical relocation. Hybrid Multiversity represents not just a technological evolution, but a philosophical one: international education as a distributed, digitally-enabled, and workforce-aligned experience.

Push factors

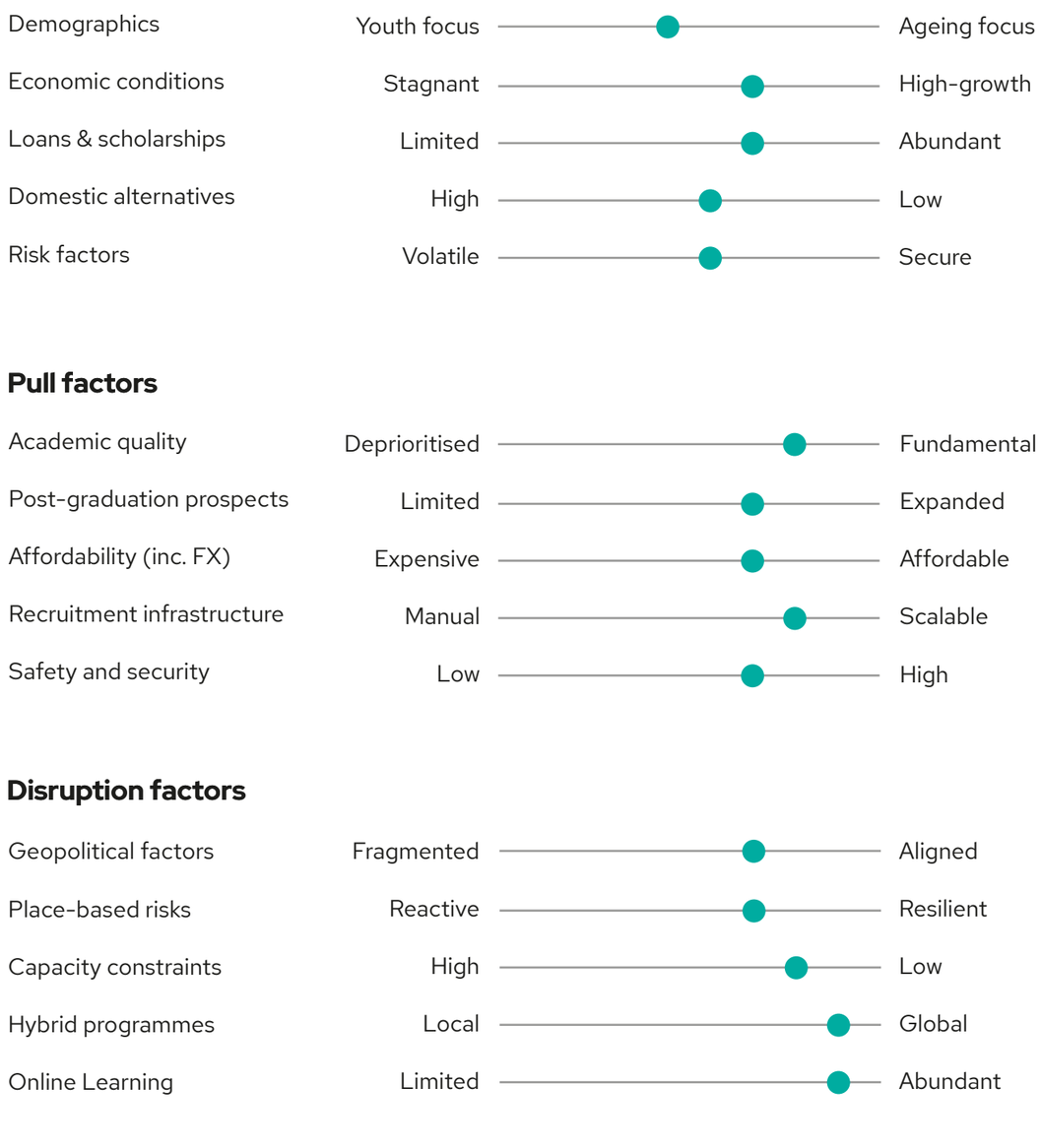
The drivers of outbound student mobility remain compelling, but in the Hybrid Multiversity scenario, they manifest through new pathways that favour flexibility and cost efficiency. Demographic momentum in regions such as South Asia, Sub-Saharan Africa, and Southeast Asia sustains high demand for tertiary education, particularly among youth from middle-income households. However, many prospective students face barriers related to cost, distance, or family obligations - factors that traditional models of international education struggle to accommodate.

Economic uncertainty compounds the need for reform. As income inequality widens and currency volatility persists, families increasingly prioritise affordability and value. The hybrid model responds to these constraints by dramatically reducing the total cost of a degree. By enabling students to complete a substantial portion of their studies at home, either online or through local campuses, the financial burden is significantly lessened.

Moreover, access to scholarships and financial aid expands in tandem with this structural shift. Micro-credentials and modular programmes qualify for support from local governments and development agencies seeking to build domestic capacity without sacrificing global credentials. This investment in blended formats positions hybrid education as a financially viable alternative to traditional mobility.

Perhaps most crucially, hybrid models offer a buffer against rising global instability. In an era marked by political unrest, climate disruptions, and migration barriers, the ability to begin or continue education without travelling becomes a form of risk mitigation. The Hybrid Multiversity is not only a response to budgetary constraints - it is an adaptive mechanism for expanding participation in global education while navigating the practical realities of the 21st century.

Figure 17. Hybrid Multiversity scenario. Qualitative factor assessment



Pull factors

In the Hybrid Multiversity world, destination attractiveness is no longer defined solely by campus prestige or post-study work visas. Instead, institutions that offer high-quality hybrid delivery, credible global credentials, and embedded employability features become the new magnets for international demand. Academic quality remains paramount, but its delivery becomes more flexible, with coordinated curricula, shared assessment rubrics, and transnational faculty collaboration. These structures ensure that students experience consistency and rigour across online, local, and global segments of their degree.

Post-graduation opportunities are increasingly embedded into programme design. Remote internships and digital work-integrated learning placements are paired with shorter in-person study phases, enabling students to develop professional competencies without committing to extended overseas stays. Governments adjust migration and visa policies to account for these new forms of global engagement, recognising hybrid and online credentials for work rights and residency pathways. However, access to these opportunities remains uneven and often tied to national priorities or sector-specific shortages.

Affordability plays a decisive role. Hybrid models reduce travel and accommodation costs, lessen foreign exchange exposure, and allow tuition to be paid in local currency for substantial portions of the programme. Students and families respond favourably to this value proposition, viewing it as a sustainable investment in uncertain economic times.

Recruitment also evolves. Institutions build digital pipelines, partner with local providers, and scale modular offerings to attract students outside the traditional elite. Safety considerations, once a peripheral factor, move centre stage. By reducing the need for long-term relocation, hybrid education lowers risk and increases access, without sacrificing global engagement.

Disruption factors

Disruption is not an anomaly in the Hybrid Multiversity scenario; it is the catalyst for transformation. Geopolitical fragmentation, pandemic volatility, and chronic infrastructure constraints all contribute to the erosion of the traditional long-haul education model. Rather than resist these forces, institutions and governments reconfigure their strategies to embrace modularity, decentralisation, and digital delivery. The result is a more resilient international education system - one designed to absorb shocks and maintain continuity under adverse conditions.

Geopolitical risk becomes a central planning variable. Students and families increasingly avoid politically unstable regions or countries with opaque visa regimes. Multi-site programme design offers geographic optionality, allowing students to shift locations mid-course or complete entire phases remotely if necessary. Institutions hedge against regional instability by diversifying campus networks and forging reciprocal arrangements with like-minded partners.

Public health disruptions no longer bring education to a halt. The embedded nature of online delivery and asynchronous learning ensures that the study progresses regardless of local shutdowns or travel restrictions. Modular scheduling and flexible credit pathways further insulate learners from external shocks.

Capacity constraints, once a defining feature of elite institutions, are circumvented through digital scalability. Institutions can extend their reach without overwhelming physical infrastructure, while smaller providers in emerging markets expand access via technology partnerships. Online learning is no longer an emergency substitute; it is foundational to programme architecture. Hybrid Multiversity is thus less a contingency plan and more a structural evolution. It redefines resilience not as the ability to return to the status quo, but as the capacity to adapt, flex, and continue across borders, formats, and futures.

Talent Race Rebound

Talent Race Rebound

The Talent Race Rebound scenario imagines a renewed era of international education - one where global talent shortages, demographic contraction in developed economies, and the strategic imperative for innovation converge to position education as a primary channel for human capital acquisition. By 2030, traditional destination countries, such as the United States, the UK, Canada, and Australia, will reverse the restrictive policies of the early 2020s, replacing them with streamlined visa systems, extended post-study work rights, and direct migration pathways for international graduates in high-demand fields.

This recalibration is not merely administrative but structural. Governments, universities, and industries operate in strategic alignment, targeting talent in sectors such as artificial intelligence, cybersecurity, advanced manufacturing, biotechnology, and clean energy. Public investment in scholarships and research is matched by private-sector co-funding for internships, apprenticeships, and graduate employment. These partnerships restore confidence in the relevance and outcomes of higher education systems, particularly those with global reputations and world-class facilities.

The student proposition is clear: invest in a full-degree, on-campus experience and gain a fast-tracked entry into high-value labour markets. Application volumes from India, Nigeria, Indonesia, and Brazil surge as families interpret study abroad not simply as education but as migration with a purpose. Policymakers respond by directing flows toward regional cities to mitigate capacity pressure in urban centres, reinforcing geographic balance. In this scenario, international education shifts from its soft-power origins to become a competitive instrument of national economic and geopolitical strategy, central to shaping the global distribution of talent in the 21st century.

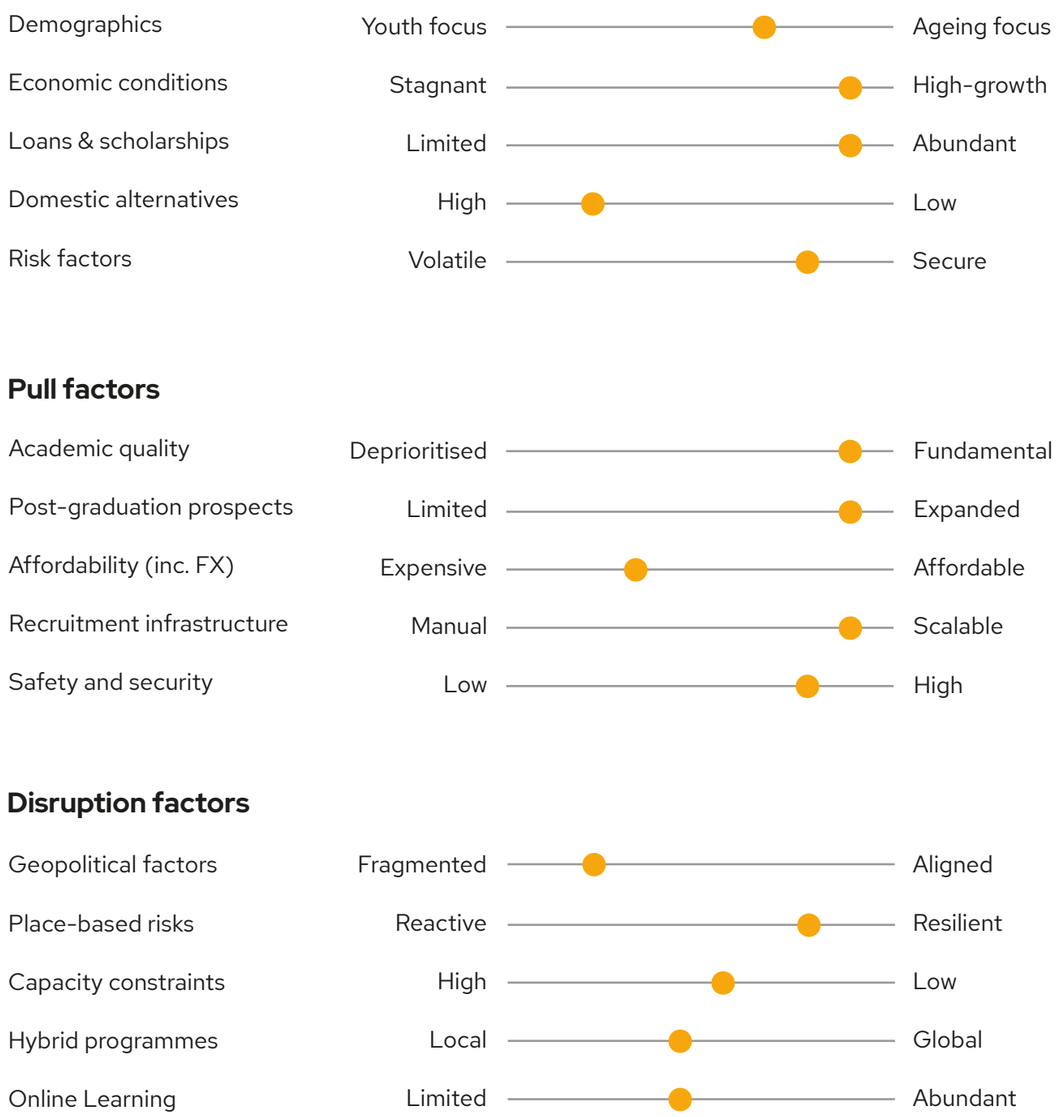
Push factors

Under the Talent Race Rebound scenario, push factors from source countries are not only intensified but are increasingly met with pathways that are clearly defined and economically rewarding. Demographically youthful populations in countries such as India, Nigeria, and Indonesia represent both a domestic challenge and a global opportunity. With limited domestic capacity and high aspirations among their growing middle classes, these countries experience a surge in outbound demand, especially for degrees that promise employability and permanent residency.

Economic divergence between emerging markets and advanced economies reinforces this trend. While many source countries face employment stagnation or underemployment for graduates, destination countries project acute labour shortages in strategically important sectors. This mismatch enables education to serve as a cross-border talent bridge, drawing students from surplus to scarcity regions. Host nations offer generous scholarships and loan schemes, many of them linked directly to skill gaps. These financial instruments, often co-funded by government and industry, reduce the financial barriers to study abroad and tilt student decisions toward markets that guarantee post-study employment.

Domestic alternatives, even when academically robust, cannot match the migration-linked value proposition of destination markets. As a result, even students with access to quality education at home increasingly favour overseas institutions where degrees function as both credentials and residency accelerants. Risk, traditionally a deterrent, is reinterpreted. Students and families accept geopolitical and climate-related uncertainty in exchange for upward mobility, weighing the odds and betting on jurisdictions with stronger governance and greater economic opportunity.

Figure 18. Talent Race-Rebound scenario. Qualitative factor assessment



Pull factors

In the Talent Race Rebound scenario, pull factors are dramatically recalibrated to prioritise employability, immigration pathways, and economic alignment. Academic excellence remains important, but it is the coupling of educational prestige with strategic career opportunities that reshapes destination attractiveness. Leading institutions in the US, the UK, Canada, and Australia invest heavily in research, global faculty recruitment, and facilities to support applied learning in key industries. Curriculum reform is guided not only by academic governance but also by industrial demand, ensuring that students graduate with market-ready skills.

The most powerful magnet, however, is the promise of structured post-graduation employment. Destination countries streamline post-study work rights, especially in high-demand STEM fields, with many offering three-to-four-year visas linked to points-based migration systems. This directly positions international education as a credible pathway to long-term residency and professional integration, particularly for high-achieving students.

Affordability remains a consideration, but financial barriers are mitigated by a robust ecosystem of scholarships, graduate employment guarantees, and high projected earnings. Students and their families increasingly view the return on investment in international education through the lens of lifetime earning potential and security.

Recruitment efforts become more aggressive and professionalised. National education brands deploy digital channels, expand agent networks, and introduce dedicated talent attachés in priority markets. Safety and welfare standards are elevated in response to competition, with host nations using legal protections, community engagement, and high-profile support systems to reinforce trust. In this model, international education is no longer a luxury; it is a strategic migration mechanism.

Disruption factors

The Talent Race Rebound scenario does not eliminate disruption; it absorbs and retools it. Geopolitical instability, health risks, and infrastructure constraints remain present but are increasingly managed rather than avoided. Education becomes both an economic necessity and a geopolitical tool, used by countries to secure their position in the global talent hierarchy. Diplomatic initiatives are designed to support international enrolment, with soft power deployed strategically to outcompete rivals. Visas become instruments of foreign policy, and universities serve as engines of influence and immigration.

Pandemics and place-based disruptions, while still a risk, are no longer viewed as existential threats to international education. Public health protocols and resilient infrastructure ensure the continuity of campus operations. Rapid adaptation mechanisms, such as digital onboarding, modular course delivery, and localised contingencies, allow systems to bend without breaking. Institutions that offer reliable, high-quality experiences under stress become especially attractive to international applicants.

The primary constraint is physical capacity. Soaring demand for on-campus experiences strains housing, transport, and classroom infrastructure. Governments respond with targeted investment in secondary and regional cities, often through public-private partnerships. Capacity planning becomes as much a national economic development strategy as an education issue.

Hybrid programmes and online learning retain a role but are largely confined to early-stage delivery or lifelong learning pathways. The core experience remains campus-based and immersive, with physical presence seen as essential to migration-linked outcomes. Ultimately, this scenario transforms disruption into impetus; accelerating reform, enhancing resilience, and positioning education as a central asset in national competitiveness.

Methodology

Global Student Flows

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

Open source framework

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

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

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

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

Push factors: Drivers of outbound mobility from source countries

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

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

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

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

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

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

Pull factors: Determinants of destination market attractiveness

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

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

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

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

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

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

Disruption factors: Drivers of volatility and alternative mobility scenarios

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

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

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

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

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

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

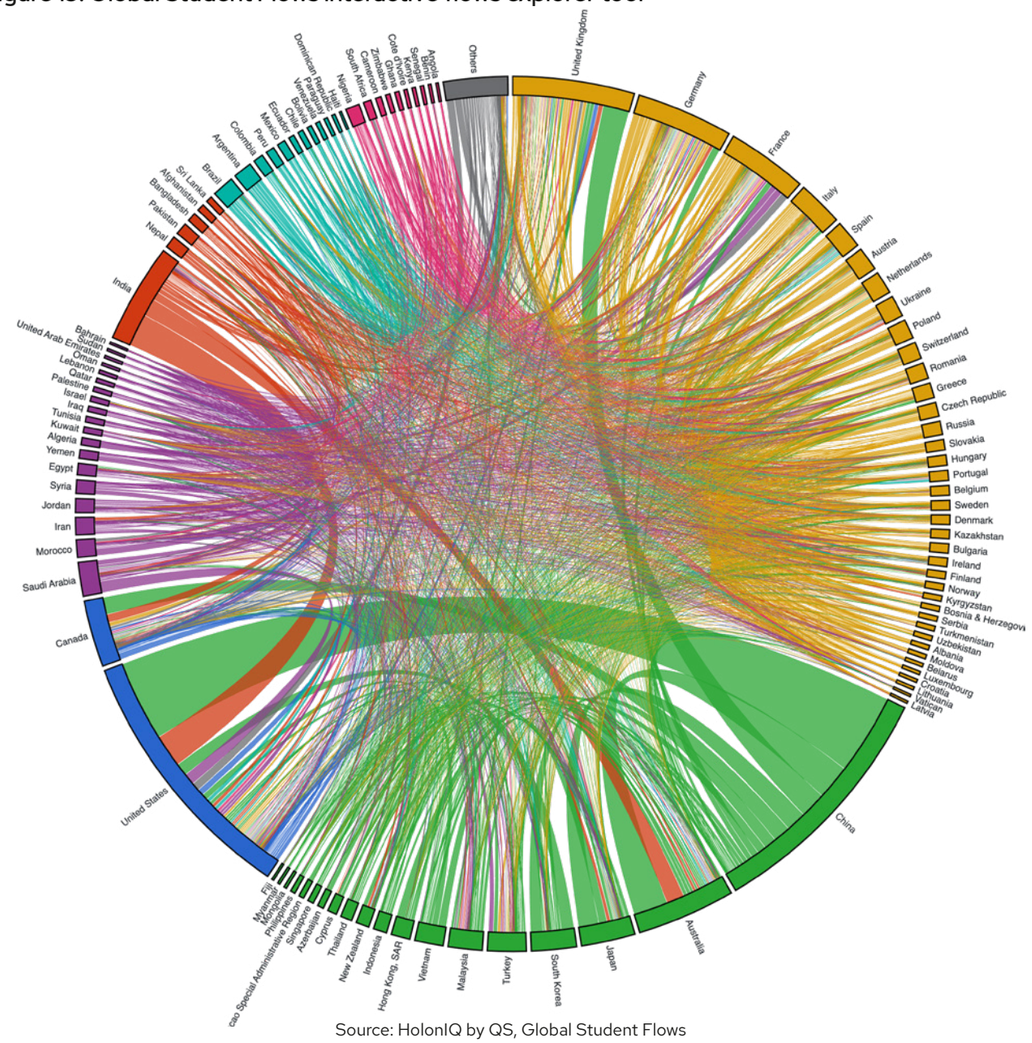
Mapping flows

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

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

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

Figure 19. Global Student Flows interactive flows explorer tool



Source: HolonIQ by QS, Global Student Flows

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

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

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

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

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

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

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

Figure 20. Global Student Flows, open-source framework

Push factors		Pull factors		Disruption factors
Source country Confidence intervals & distribution curves	X	Destination country Confidence intervals & distribution curves	X	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-enrolment journey. We want to know what students prioritise when choosing a location, university and course, and we want to understand what they perceive as high-quality teaching. We ask students how their family influence decision making, and we gather data on the social media and digital channels they use to find study information.

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

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

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

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

International Student Survey respondent demographics

Figure 21. Subject preference

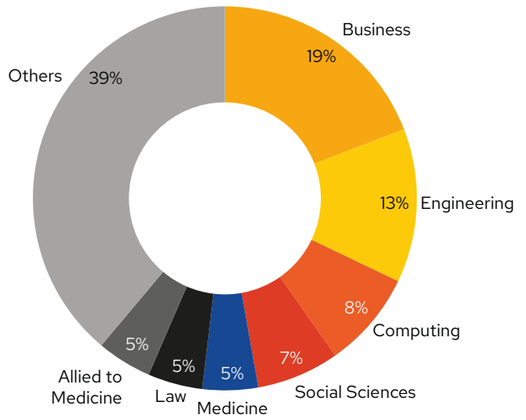


Figure 22. Study level

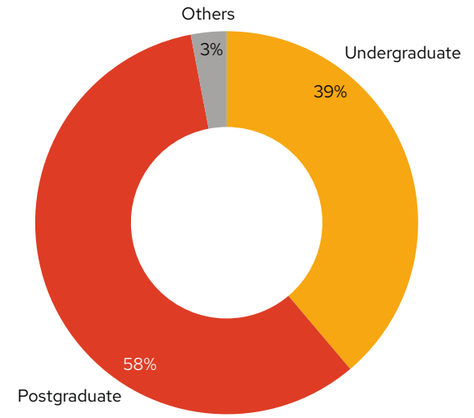
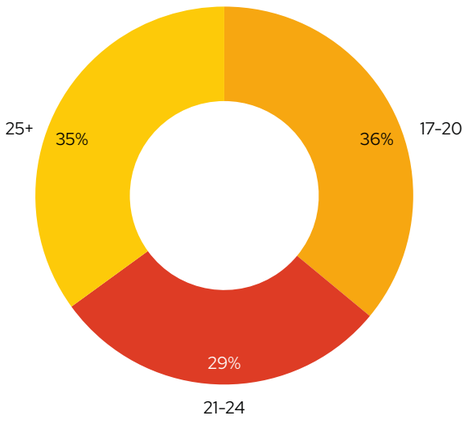


Figure 23. Age



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

Key sources include:

UNESCO Institute for Statistics, 2023

World Bank Education Statistics, 2021

OECD, 2022

Eurostat, 2023

IOM Migration Data Portal, 2022

IIE Project Atlas, 2024

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

Australian Government, Department of Education, 2023

Belgium Federal Public Service for Education, 2023

Campus France, 2023/24

Council of Higher Education (YÖK), 2022

Department of Higher Education and Training, South Africa, 2022

Department of Home Affairs – Australia Student Visa Data, 2024

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

Education Malaysia Global Services, 2024

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

ETH Zurich, 2023

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

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

General Statistics Office of Vietnam (GSO), 2023

Government of Canada, 2023

Higher Education Commission (HEC), Pakistan, 2023

Higher Education Statistics Agency (HESA), 2022/23

Hungarian Central Statistical Office (KSH), 2022

Immigration, Refugees & Citizenship Canada (IRCC), 2023

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

Japan Student Services Organization (JASSO), 2024

Ministry of Education, Argentina, 2023

Ministry of Education, Brazil, 2022

Ministry of Education, China, 2021

Ministry of Education, Columbia, 2023

Ministry of Education, Ghana, 2021

Ministry of Education, Singapore, 2023

Ministry of Education, South Korea, 2024

Ministry of Education, UAE, 2021

Ministry of Education & Science, Czech Republic, 2022

Ministry of Education and Science, Poland, 2023

Ministry of Education and Science, Uzbekistan, 2023

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

Ministry of Higher Education, Morocco, 2021

Ministry of Higher Education, Saudi Arabia, 2022

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

Ministry of Higher Education, Tunisia, 2021

Ministry of Science & Higher Education, Russia, 2022

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

Ministry of Universities, Spain, 2022/23

National Universities Commission, Nigeria, 2020

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

Nuffic, 2023/24

Philippines Commission on Higher Education (CHED), 2023

Portugal Directorate - General for Education and Science Statistics, 2023

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

Statistics Canada, 2022/2023

Statistics Finland (Tilastokeskus), 2023

Statistics Norway (SSB), 2023

Statistics Sweden (SCB), 2023

Statistisches Bundesamt (Destatis), 2024/25

Student and Exchange Visitor Information System (SEVIS), 2023

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

Swedish Higher Education Authority (UKÄ), 2022

Ukraine State Center for International Education, 2023

University Grants Commission, Bangladesh, 2023

Wissenschaft weltoffen, 2023/24

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