



Latin America

Global Student Flows
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Contents

Contents	04
Foreword	06
Executive Summary	10
2030 Outlook	12
Destination Outlook	16
Student Origins	22
Outbound Trends	36
The Three Scenarios for 2030	40
Drivers for Growth	46
International Student Trends	50
Methodology	58

Foreword



Ben Webb
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I am delighted to introduce the Global Student Flows: Latin America report. Over the past eight years, the Global Student Flows Initiative has become a reliable source of intelligence for higher education leaders and policymakers seeking to understand how international student mobility is evolving worldwide.

The Initiative has entered a new phase. By bringing together QS student mobility data with insights from the International Student Survey and institutional performance metrics, we can present a more layered and nuanced picture of Latin America's position within the global education ecosystem.

Latin America plays a distinctive and increasingly strategic role in global student mobility. The region remains a significant contributor to outbound international demand, while also strengthening its own higher education capacity and regional appeal. However, mobility patterns are being reshaped by economic pressures, demographic change, evolving student preferences, and policy decisions in key destination markets. These shifts underline the need for institutions to diversify recruitment approaches, manage exposure to risk, and identify sustainable pathways for growth.

This report adopts a forward-looking perspective on student mobility connected to Latin America, examining both outbound trends and emerging inbound opportunities. The report maps key sending and receiving markets, analyzes major mobility corridors, and projects student volumes to 2030. When combined with fresh evidence from the QS International Student Survey, these findings translate into actionable insights to support more effective recruitment, engagement, and student experience strategies.

Using a robust, data-led methodology, we also explore how international student flows could develop through to 2030 under three alternative futures: Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound. Together, these scenarios offer a practical planning tool for institutions navigating an uncertain decade ahead.

QS is committed to working alongside institutions across Latin America as they respond to ongoing change in global higher education. The perspectives shared in this report represent an important step forward but also point to broader opportunities for collaboration. Through advanced analytics, global benchmarking, student engagement platforms, and skills-focused innovation, QS supports institutions in building resilience and long-term impact. With deep expertise in international higher education, we help partners clarify their strategic role in a complex global landscape, and support them in turning ambition into action.



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Support innovation, new models, and market expansion for long-term institutional growth

Provide sector-leading analytics and insights to enable global benchmarking and performance improvement

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Get in touch to find out more

Report Findings

Executive Summary

The number of international students studying in Latin America is expected to reach 500,000

Growth Slows, but International Student Numbers Will Still Increase

Latin America is entering a new era of international student mobility, with the number of foreign students in the region projected to grow from approximately 366,000 in 2024 to over 500,000 by 2030 – a steady annual increase of 5.5%, following a decade of 7.5% yearly growth. The market remains concentrated, with Argentina, Mexico, and Brazil together hosting more than 60% of all inbound students. Argentina alone accounts for nearly 40% of the region's international enrollments, though its growth is expected to moderate to 5% annually due to political and economic pressures.

Brazil's inbound enrollments are forecast to rise from about 27,000 in 2024 to 34,000 by 2030 (4% annual growth), driven by demand from South America and Portuguese-speaking Africa. Mexico distinguishes itself as a gateway for European students, with Europeans now making up nearly a quarter of its international cohort.

Intra-regional mobility dominates the forecast, with Peru, Colombia, Ecuador, Brazil, and Bolivia identified as major sources. Shared languages, affordable tuition, and frameworks like MERCOSUR and the Pacific Alliance reinforce this trend.

Outbound Mobility is Shifting

Europe is now the primary destination for Latin American students, with enrollments there expected to grow by 6% annually to 2030, while traditional Anglophone destinations face declining appeal due to rising costs and stricter visa regimes.

Transnational education (TNE) is on the rise, with Latin American universities expanding through partnership-led models rather than costly overseas campuses.

Reputation Must Be a Key Focus

With steady or declining median reputation ranks, Latin American countries must re-focus their efforts on building a reputation for excellence among academics and employers. Students from Europe and the US, key source markets, strongly desire highly reputable institutions.

For institutions, the opportunity lies in deepening engagement with neighboring countries, leveraging European demand, and investing in flexible delivery models—including digital and TNE pathways—to remain competitive.

Strategic Challenges

1. Rebuilding Institutional Reputation

Reputation is a top factor for students – 67% of Latin American and 70% of American and Canadian candidates consider it important when making study decisions. Yet, the median Employer Reputation rankings for Brazilian and Argentinian institutions have declined sharply.

2. Navigating Policy and Affordability Shifts

Policy changes, such as Argentina's proposed tuition for non-resident students, and broader economic or political uncertainty, can quickly impact student flows. Rising costs and stricter visa rules in traditional destinations are also shifting outbound mobility toward Europe.

3. Delivering Employability and Skills

Students increasingly value work placements and skill development, but employer perceptions lag behind actual graduate outcomes.

2030 Outlook

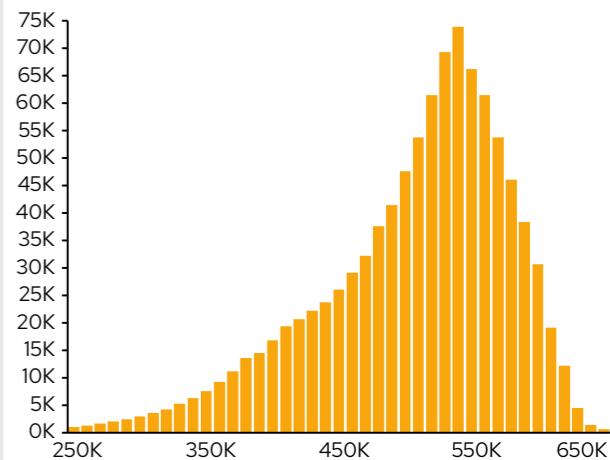
International student inflows to Latin America are entering a new phase of measured but durable expansion. After a decade of brisk growth - averaging more than 7.5% a year to 2024 - the region is now expected to grow at a steadier 5.5% annually, rising from roughly 366,000 foreign students in 2024 to more than half a million by 2030. The outlook is shaped by structural advantages that the region already enjoys - shared languages, affordable tuition, and dense political and mobility ties - as well as by global realignments that are reshaping study-abroad preferences.

The regional market remains highly concentrated. Three destinations - Argentina, Mexico, and Brazil - together account for more than 60% of all inbound students. Argentina alone hosts close to 40%, a dominance built on its long-standing tradition of low-cost public higher education and significant intra-regional mobility. However, its previously rapid expansion is likely to cool. Political uncertainty, budget pressures, and intensifying competition from Europe - particularly Spain, now the top global destination for Latin American outbound students - are expected to temper growth to around 5% a year. Even so, Argentina will remain the region's anchor market, with neighboring countries continuing to supply around nine in ten of its international students.

Brazil, meanwhile, is gradually strengthening its position, though from a smaller base. Inbound enrollments are forecast to rise from about 27,000 in 2024 to roughly 34,000 by 2030, an increase of around 4% annually. Much of the demand comes from nearby South American countries and from Portuguese-speaking Africa, where students view Brazil's linguistic familiarity and cultural proximity as competitive advantages. Brazil's fast-growing digital education infrastructure is also widening access, with online and technology-oriented degrees becoming meaningful entry points for international learners.

Figure 1. Simulation Frequency for Total International Students to Latin America and the Caribbean in 2030

Simulations at various International Student Levels



Source: QS Global Student Flows, January 2026

Mexico stands out for a different reason - its growing appeal to Europeans. While students from the US make up the majority (40%), students from Europe now make up nearly a quarter of Mexico's international cohort - making it the region's most significant gateway for Europe - LATAM mobility. A network of bilateral agreements and institutional partnerships is helping Mexico diversify its inbound profile in ways few other Latin American markets currently match.

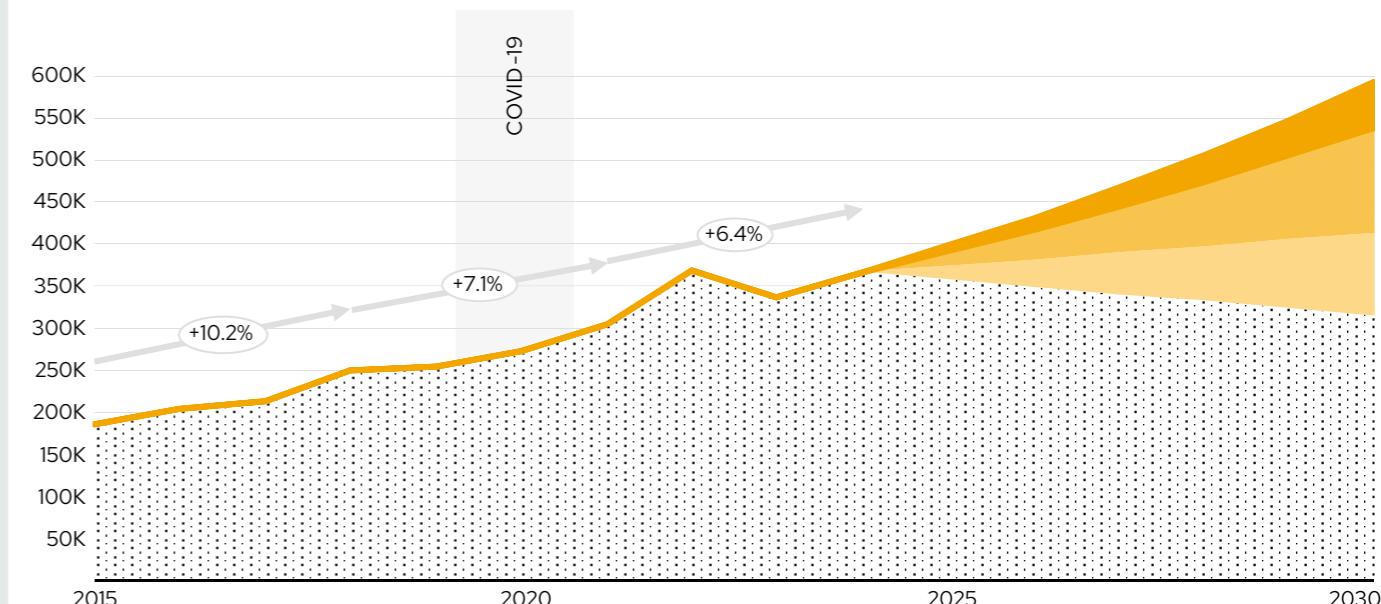
Despite these pockets of diversification, Latin America remains overwhelmingly regional in its student flows. Peru, Colombia, Ecuador, Brazil and Bolivia are some of the largest sources of intra-LATAM mobility. Shared language ecosystems, cost advantages, and mobility frameworks such as MERCOSUR and the Pacific Alliance are likely to reinforce this pattern.

Latin America's outbound trends also matter for assessing future inbound dynamics. Traditional Anglophone destinations are becoming less accessible for the region's students as rising costs, tighter visa regimes, and caps on student numbers erode their appeal. Canada's slowdown - with Brazilian and Colombian enrollments falling - and Australia's recent declines linked to stricter entry rules have created a vacuum. Europe has emerged as the primary beneficiary: Latin American enrollments there are expected to grow by roughly 6% annually to 2030, attracted by lower fees, a wider scholarship ecosystem, and more welcoming policy settings. This redirection of outward flows may, over time, reduce the pool of students who would otherwise have circulated within the region.

A final trend of strategic importance for institutions is the gradual rise of transnational education (TNE). Instead of building costly overseas branch campuses, Latin American universities are expanding through partnership-led models, enabling them to internationalize at lower risk while building global recognition. Although still nascent compared with Europe or Asia, the region's TNE activity is expected to increase as universities seek new revenue streams and as governments prioritize educational diplomacy.

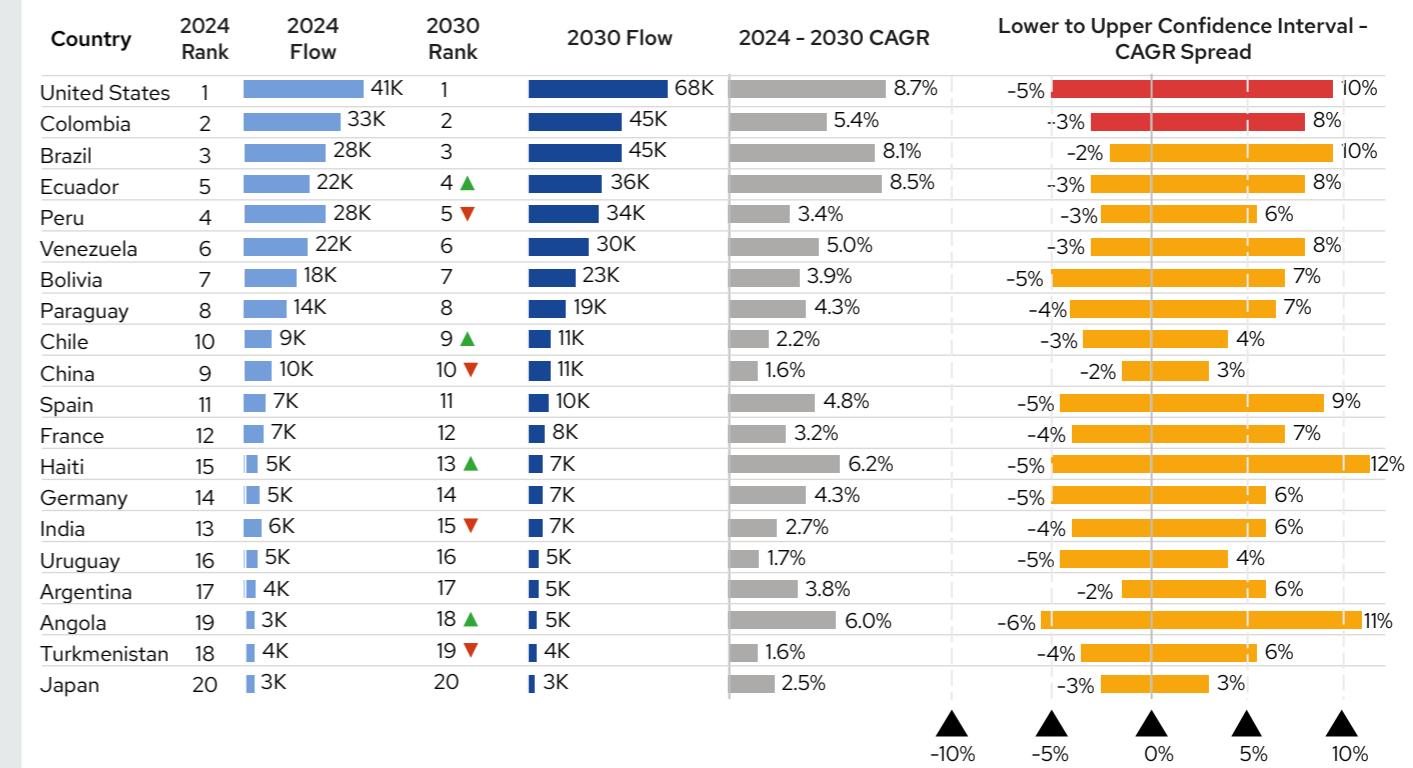
Overall, the outlook for international student mobility into Latin America is one of steady, sustainable growth rather than the breakneck expansion of the past decade. For universities and recruiters, the opportunity lies in three areas: deepening engagement with neighboring countries, leveraging emerging European demand, and investing in flexible delivery models - including digital and partnership-driven TNE - to stay competitive in an increasingly contested global market.

Figure 2. Total International Students Studying in LATAM, 2015-2030F



Source: QS Global Student Flows, January 2026

Figure 3. Top 20 Source Countries to LATAM, 2024-2030F



Source: QS Global Student Flows, January 2026

Destination Outlook

Argentina

Argentina will remain Latin America's largest study destination, though inbound growth is expected to moderate to about 5% annually over the next five years. This represents a slower pace than the stronger expansion of the past decade, when low-cost public education, migration flows and regional mobility frameworks drove rapid increases. The moderation reflects tightening public budgets, political uncertainty and a maturing of regional demand. It also reflects growing competition from Spain, which has become the top destination globally for Latin American students, drawing away some of the outbound pool that previously favored regional mobility. Even so, Argentina's inbound profile will continue to be shaped overwhelmingly by intra-regional flows, which account for around 90% of all foreign students.

Regional students, in particular from Brazil, Peru, Ecuador and Colombia, make up nearly 60% of all foreign enrollments and will remain the main driver of growth, with flows from Latin America projected to rise close to 5% annually over the forecast period. This concentration is structural. Shared language, cultural affinity and relatively low travel costs lower the barriers to degree study in Argentina. Mobility agreements such as MERCOSUR residence rules and regularization pathways for migrants, including the recent wave of Venezuelan arrivals, have expanded the pool of foreign-origin students who can enrol in public universities. Argentina's long-standing model of free or low-cost undergraduate education, often extended to foreigners, remains its most powerful competitive advantage, particularly for students who would otherwise face far higher fees in Chile, Brazil or Mexico.

European inflows, while expected to grow by around 4% annually, remain marginal in absolute terms. Growth is led primarily by Russia, which is projected to expand at roughly 8%, but this does little to shift the system's overwhelmingly intra-regional profile.

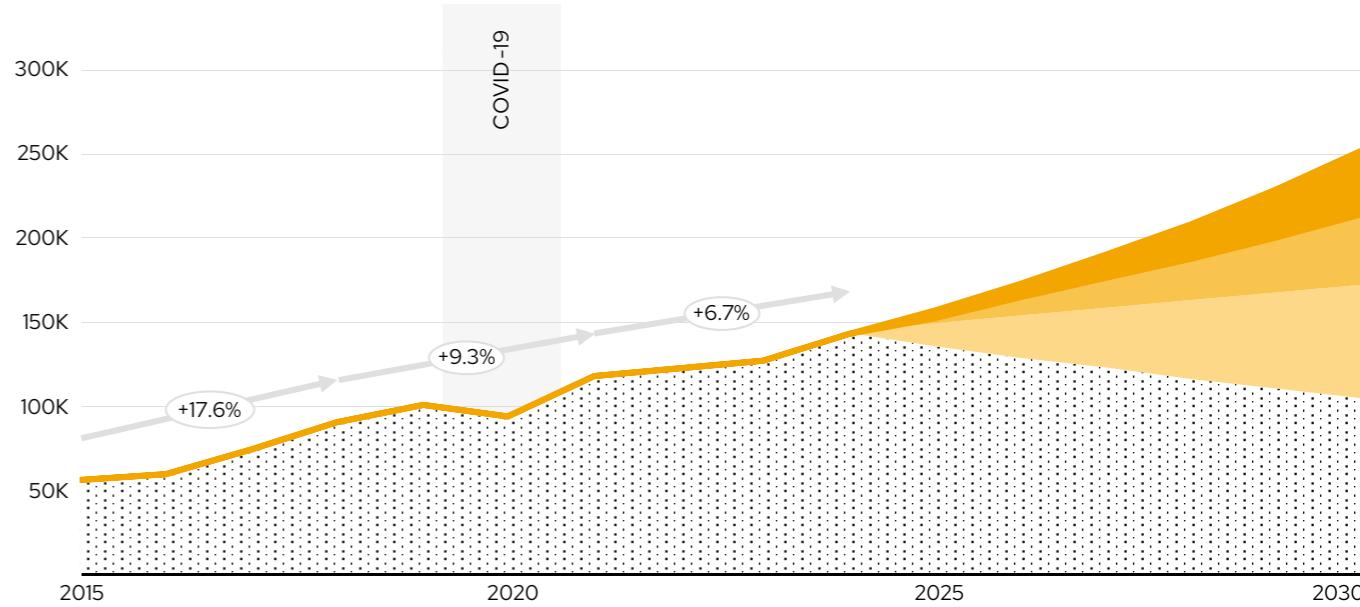
Most foreign students pursue full undergraduate degrees, mirroring domestic enrollment trends. Government reporting consistently shows that international students enter undergraduate and postgraduate programs rather than short courses, exchanges or language training. Fields of study follow Argentina's national distribution, with strong representation in humanities, social sciences, health professions, teacher training and medicine, areas where Argentine universities have deep regional reputations and relatively low entry costs.

The main risk to the outlook stems from the government's 2024 proposal to charge tuition to non-resident foreign students in public

universities. If implemented broadly, it would overturn decades of near-free access and could significantly reduce demand from regional students who choose Argentina precisely because it offers affordable, Spanish-language degree pathways. The proposal is politically contentious and still under debate, which is already contributing to the moderation of growth. At the same time, mobility initiatives such as Campus Argentina Global suggest the state retains instruments to attract and support inbound flows.

If tuition reforms move ahead, inbound numbers could weaken notably. If they stall, Argentina will likely maintain its position as the region's largest destination, supported by proximity, shared language and durable migration networks. The next phase of growth depends less on academic supply and more on policy stability, the affordability of public education, and the government's stance on internationalization.

Figure 4. Total International Students Studying in Argentina, 2015-2030F



Source: QS Global Student Flows, January 2026

Brazil

Brazil is positioned to consolidate its role as a growing study destination in Latin America, with inbound higher-education flows projected to expand at around 4% annually over the next five years. While growth is positive, absolute numbers remain modest, rising from roughly 27,000 students in 2024 to about 34,000 by 2030. Most international students enrol in undergraduate programs, including bachelor's and technology degrees, across both public and private universities. Distance education is becoming an increasingly important entry point, supported by Brazil's large digital education infrastructure and the prominence of technological and professional degree programs. Demand is driven primarily by regional neighbours and Portuguese-speaking African countries, which view Brazil as an accessible, culturally aligned, and linguistically familiar destination.

Angola is Brazil's top source country, reflecting the strong ties created by the shared Portuguese language. Overall, Brazil's inbound cohort is split evenly between Latin American students, who account for about 50% of enrollments, including other students from regions including Portuguese-speaking African countries. Inflows from Latin America are projected to grow at around 4% annually, while African student numbers are expected to rise faster, at nearly 5%, driven by countries such as Angola and Mozambique.

Japan represents an interesting case as the third-largest source country, although its growth is projected to slow to about 3% annually. This moderation is expected to result in Japan being overtaken by Bolivia in the source-country ranking. Japan has historically been a major partner for Brazil, underpinned by migration links and strong bilateral relations. The slowdown is linked to demographic decline, a weakening of the yen, and the growing preference among Japanese students to pursue higher education closer to home in other Asian destinations.

Brazil has historically struggled to translate ambitious internationalization goals into tangible results. The main limitations have been a lack of coordinated policy, insufficient infrastructure to support foreign students, and inconsistent implementation. These factors constrained inbound growth despite Brazil's global visibility and regional appeal.

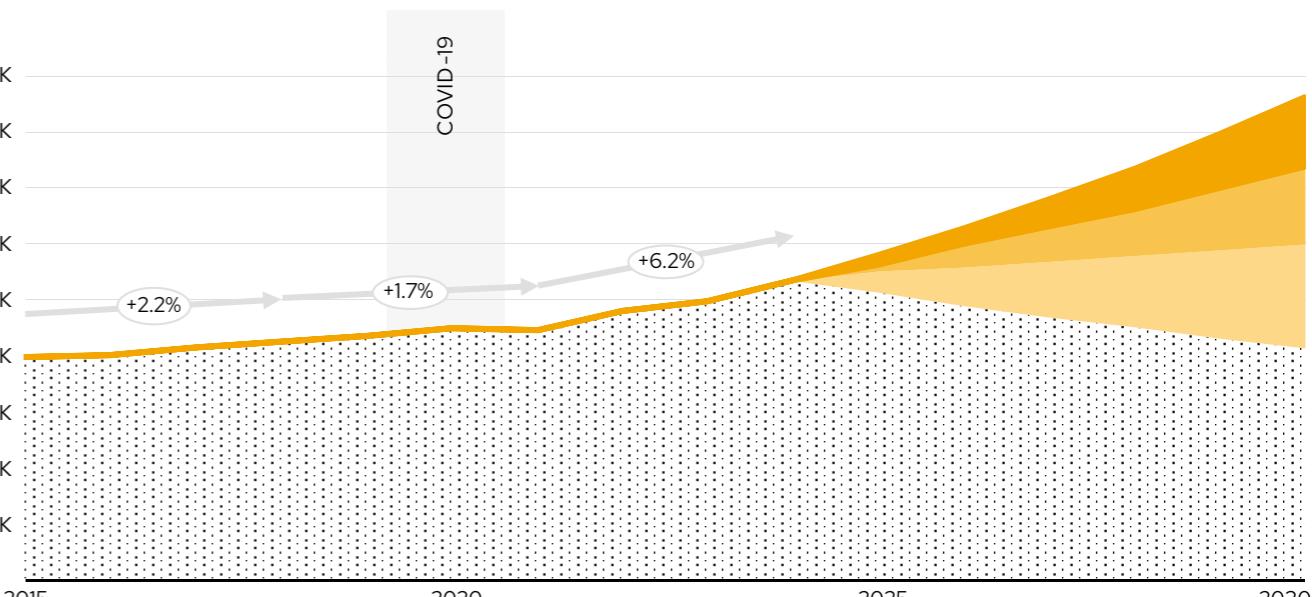
Policy signals shifted in 2024 with the introduction of residence and work authorizations for graduates, enabling eligible international students to remain in Brazil after completing undergraduate or postgraduate studies. Regulatory clarifications also allow non-traditional delivery modes, including distance learning, to count toward eligibility. These measures are expected to strengthen Brazil's attractiveness, particularly among Lusophone African students and South American cohorts, by enhancing post-study employability and retention.

Brazil's university system provides strong academic anchors, hosting three of the top ten universities in Latin America, led by

the University of São Paulo, which ranked second in the QS World University Rankings: Latin America and Caribbean 2026. These institutions enhance the country's credibility as a high-quality education destination. Political instability, however, remains a potential headwind, as uneven governance could slow the implementation of reforms.

Overall, Brazil's inbound higher-education market is set to grow steadily but modestly. Growth will depend on the continued success of post-study work pathways, regulatory clarity, and the ability of universities to attract students from Lusophone Africa and the regional Latin American market. At the same time, structural constraints such as relatively low absolute student numbers, competition from other regional destinations, and Japan's slowing outflows suggest that growth will remain measured rather than rapid. Brazil is building a more credible trajectory, but its progress will rely on policy consistency, infrastructure development, and active international engagement to convert potential into sustained enrollment growth.

Figure 5. Total International Students Studying in Brazil, 2015-2030

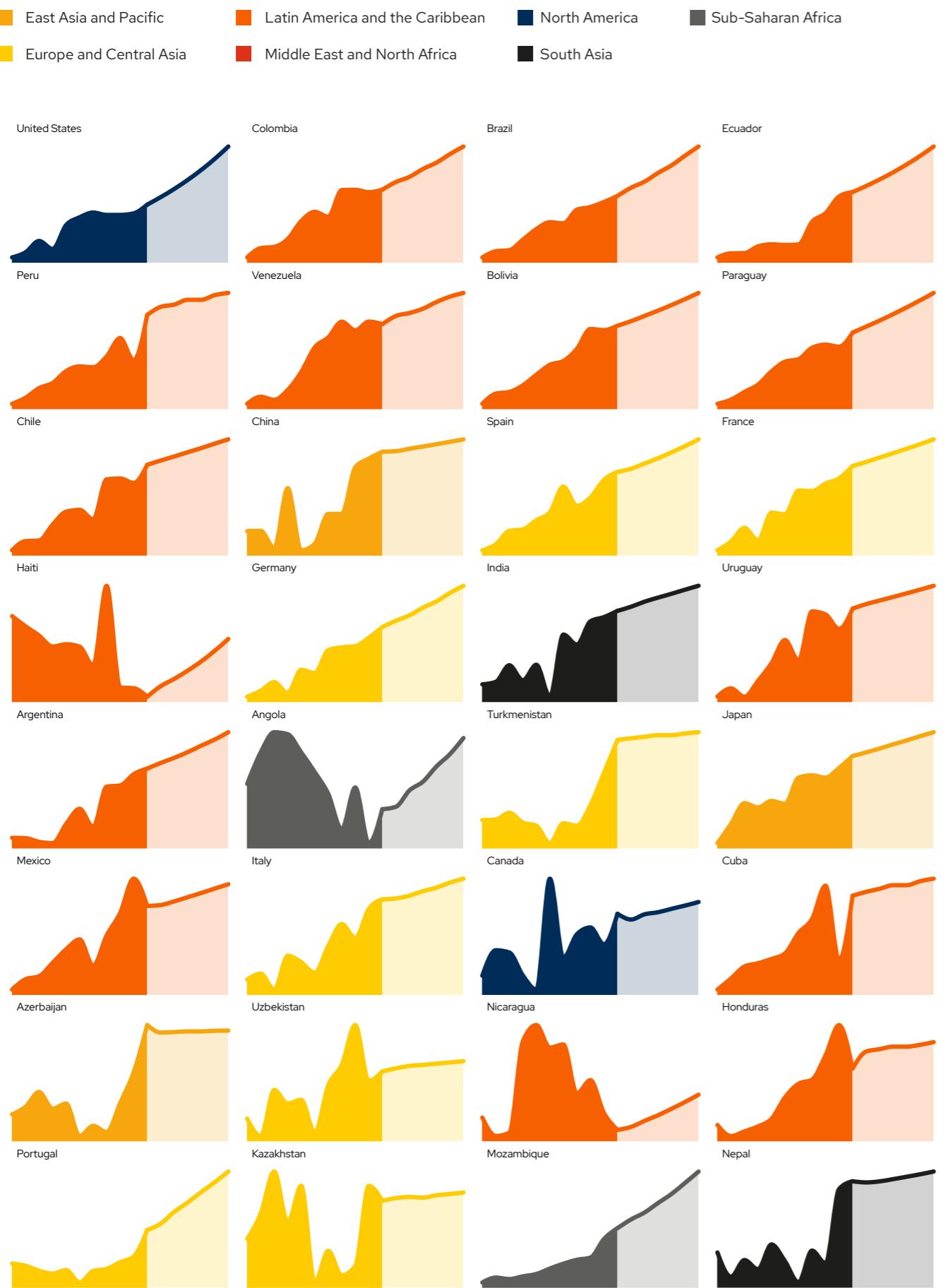


Source: QS Global Student Flows, January 2026

Student Origins

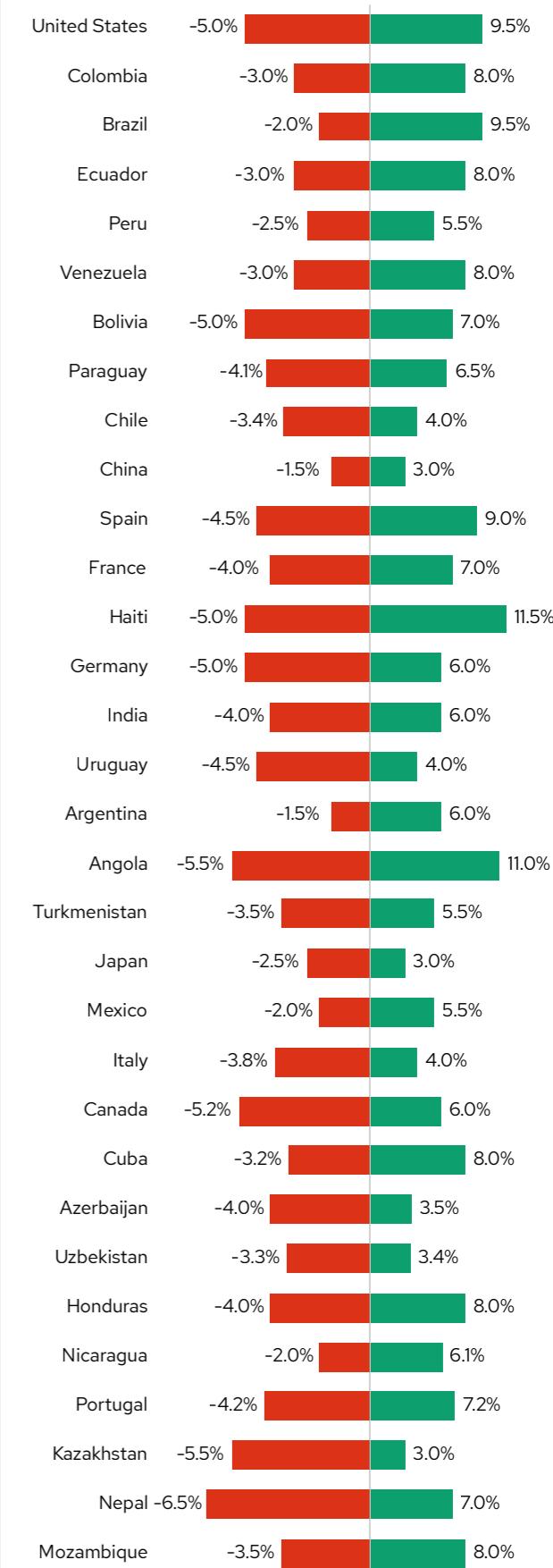
Global Student Flows: LATAM

Figure 6. LATAM Major Student Origin Growth, 2000–2030F (Point Estimate Growth Outlook)



Source: QS Global Student Flows, January 2026

Figure 7. LATAM Student Origin Growth Outlook. Lower and Upper 95% Confidence Intervals 2024–2030F



Source: QS Global Student Flows, January 2026

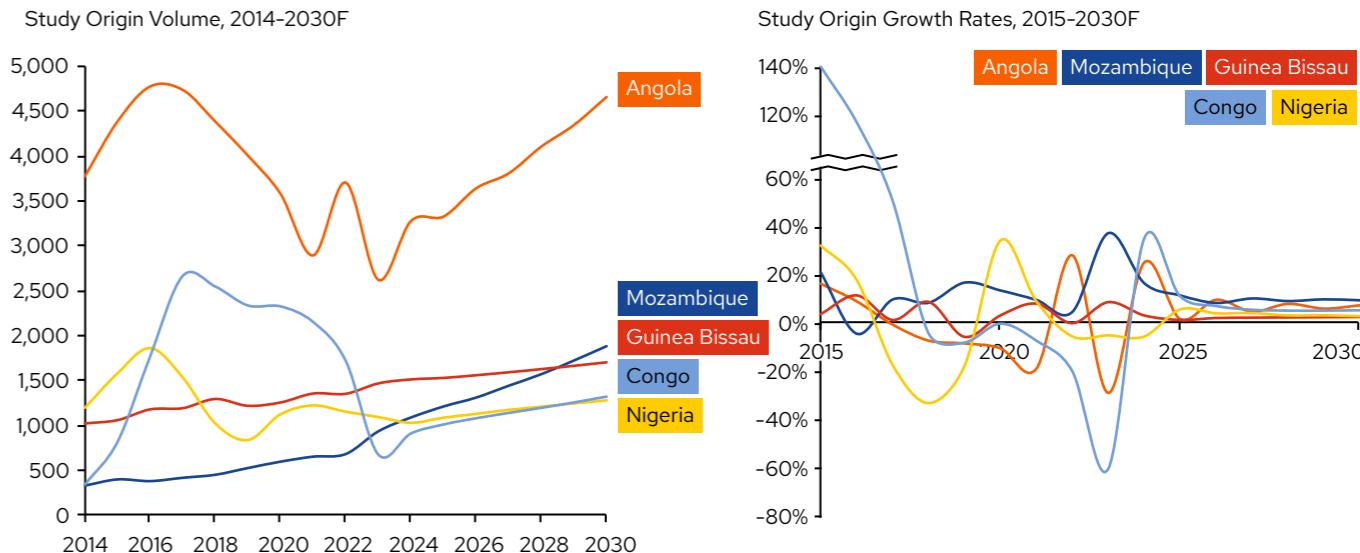
Africa

African student enrollments in universities across the LATAM region remain relatively limited, with a few major destinations showing signs of growth in numbers. While Sub-Saharan Africa continues to represent one of the highest rates of outbound mobility globally, traditional hubs for higher education, such as Europe and North America, dominate African student preferences. Driven by political turmoil and the lack of domestic capacity within the region, African students are increasingly seeking opportunities abroad, with Angola emerging as the top source country for Brazil and accounting for 10% of its international student body.

As Latin America has not positioned itself as a top destination for students from the African region, the growth in enrollments is a reflection of numbers starting from a relatively small base. However, Brazil has emerged as a key player within LATAM, with African students accounting for over 20% of its international enrollments as of 2024, representing a 6% growth over the last five years. Shared linguistic and cultural ties are influential drivers in the reshaping of these flows. Portuguese-speaking African nations such as Angola, Cape Verde, and Mozambique gravitate towards Brazil, where a common language and familiarity suggest ease of adaptation. While growth in enrollment is positive, overall numbers still remain relatively low. Similarly, French-speaking students from Benin and Burkina Faso maintain academic links with Latin American universities through Francophone networks, but these connections remain extremely limited.

In recent years, Latin American countries have liberalized their migration policies, with the relaxation of entry visa requirements and the relatively stable economic conditions following the 2008 financial crisis. In 2024, Brazil introduced a new residence authorization, which allows foreign graduates of Brazilian accredited universities to stay and work after study. This policy is particularly attractive to

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



African students who are seeking to diversify their study destinations, especially those who perceive international education as a potential pathway for professional opportunities abroad and long-term migration.

Scholarship initiatives such as the Chilean Nelson Mandela Scholarship, aimed at students from South Africa, Angola, and Mozambique, supporting them to pursue their Master's degree, reinforce academic ties between the two regions. Mexico's AMEXCID scholarship programme broadens opportunities for African students by funding undergraduate and postgraduate studies across diverse disciplines. However, challenges persist – African migrants in Latin America often face linguistic and cultural barriers, with the lack of access to information on migration rules leading them to face increased vulnerability.

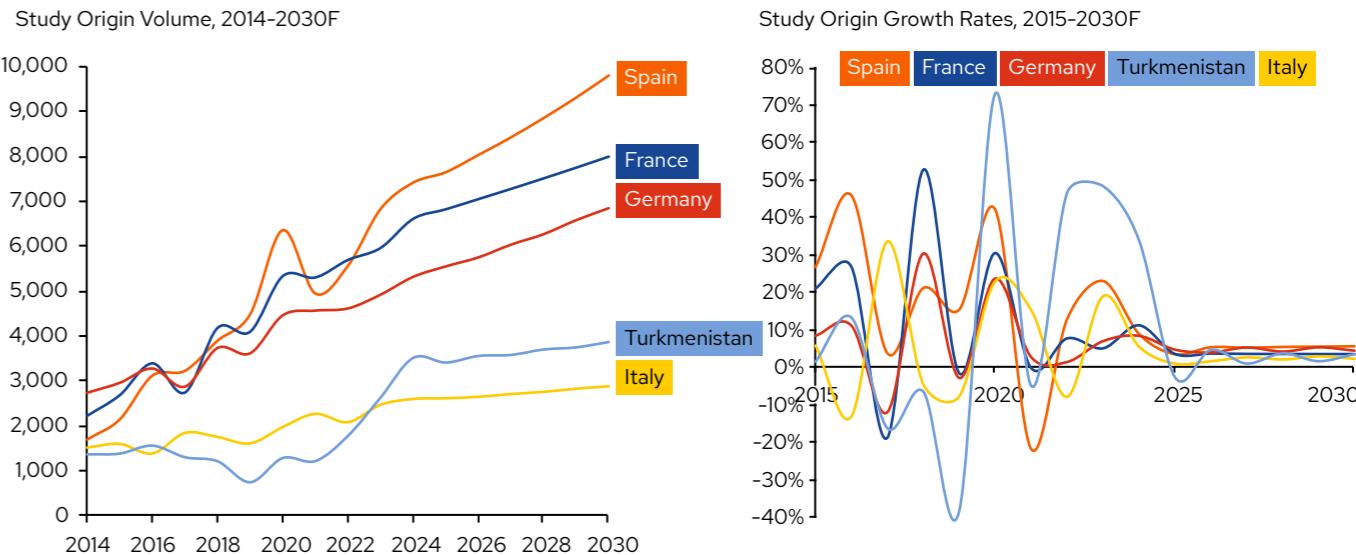
Despite growing challenges, educational mobility between Africa and Latin America shows signs of gradual momentum. With increasing implementation of targeted scholarship programs, supportive visa policies, and cultural alignment for some African countries, Latin American universities offer an accessible pathway for African students.

Europe

While European student mobility to Latin America remains relatively modest compared to the flow of Latin American students to European destinations, recent trends reflect a positive growth outlook. European students account for nearly a quarter of Mexico's international student body, positioning Mexico as the leading host destination within Latin America for students from Europe. Driven by a combination of bilateral agreements, strategic partnerships, and institutional frameworks, Europe is emerging as a potential source for LATAM's inbound student flows.

In 2024, European students made up approximately 10% of Brazil's international enrollments, with numbers projected to increase at an average of less than 2% over the next five years. While overall European inflows to Brazil and Mexico experienced a slight drop during the Pandemic, numbers have recovered since. Portugal has emerged as the top source country for Brazil, driven in part by common linguistic and cultural ties. With an average annual inflow of 8% from 2019 to 2024, Portuguese students represent a third of all European enrollments in the country. The positioning of Mexico as a key destination for European students within Latin America is reflected through its strong higher education sector, with 67 of its universities featured in the QS World University Rankings: Latin America and The Caribbean 2026. In addition, Mexico's appeal of its Spanish-language environment acts as an important driver for students from Spanish-speaking countries in Europe. Its increasing efforts in prioritising the expansion of English-taught programs are attracting a broader range of international students. Flows from Spain to Mexico are expected to rise by around 8% through 2030, following a 13% growth in 2024. In addition, universities in Spain have introduced short-term mobility scholarship programs for their students to study in Latin American countries, including Chile, Brazil, and Argentina.

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



Source: QS Global Student Flows, January 2026

Despite overall lower numbers, several initiatives have been launched in partnership with leading destinations in the LATAM region. While the Erasmus+ programme predominantly backs intra-European flows, it plays a crucial role in supporting and funding academic mobility between Europe and other regions in the world, including Latin America and the Caribbean. This increasing academic exchange is further strengthened by initiatives such as the EU-LAC Academic Summit, promoting joint research, student exchange, and the long-term vision of building a Common Area of Higher Education, Science, Technology, and Innovation between the two regions.

European student flows to the LATAM region continue to represent a small percentage of its overall outbound number. The recent institutional efforts and growing partnerships, language alignment, and collaborative initiatives suggest steady momentum, particularly for the major hubs within Latin America. Further, as both regions deepen their academic and cultural ties, LATAM is poised to stand out as an attractive destination for European students seeking a diverse and culturally rich educational experience.

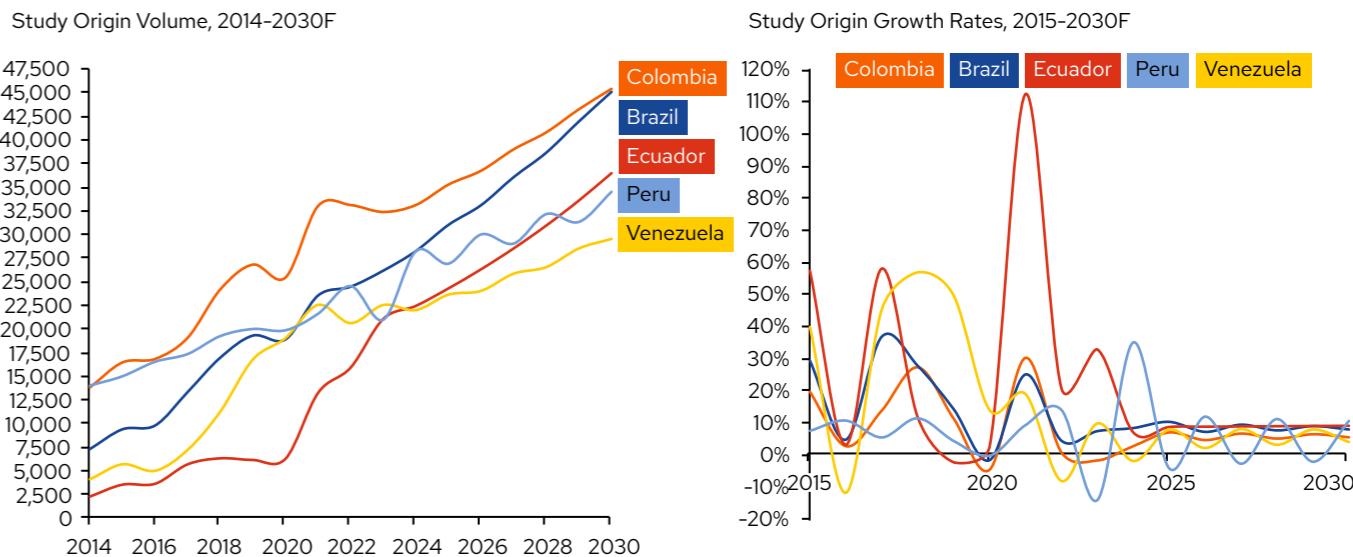
Latin America

Intra-regional student mobility within Latin America is showing steady growth, driven by affordability, shared linguistic and cultural ties, and strengthened regional cooperation. Many students are choosing to pursue their studies within the region's emerging education hubs, such as Brazil, Mexico, Argentina, and Cuba, rather than moving to North America or Europe.

Argentina is the leading destination for Latin American students, hosting more than 90% of the region's international enrollments in 2024, with Brazil, Peru, and Ecuador as the top source countries. Argentina attracts students with tuition-free or low-cost public universities, prestigious institutions such as the University of Buenos Aires, and cultural and linguistic familiarity. Student enrollments from Brazil and Peru have increased by approximately 4-9% over the past five years, with projections indicating a similar growth rate of 4-8% by 2030. Ecuador stands out as an exception among the source countries, with an approximate 30% growth from 2019 to 2024 and is expected to increase by around 10% by 2030. This growth is driven by limited access to higher education in Ecuador and an easier transition to Argentina due to minimal language and cultural barriers.

Moreover, regional frameworks established by Argentina, such as the UNESCO Regional Convention for the Recognition of Studies, along with mobility funding from organisations like the Organisation of American States (OAS) and university networks like the Asociación de Universidades del Grupo Montevideo (AUGM), are facilitating easier cross-border study and credential recognition.

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



Source: QS Global Student Flows, January 2026

In 2024, nearly 50% of Latin American students were enrolled in Brazil, with Venezuela, Colombia, and Bolivia as the top source countries. Venezuelan enrollment, which grew by around 28% over the past five years and is projected to rise by 6% by 2030, is largely driven by crisis-induced migration. Brazil's proximity, strong economy, and supportive legal framework attract Venezuelan students toward education and integration opportunities. Colombian enrollment has remained stable, with a slight decline of 2% over the past five years and projected growth of less than 1% annually by 2030. Mobility from Colombia is mainly driven by regional cooperation programs, such as MERCOSUR, which facilitate student transfers and collaboration, as well as career prospects, rather than crisis pressures at home.

Lower tuition and living costs across Latin America, especially the free or low-cost education offered by public universities in Brazil and Argentina, make studying within the region highly accessible for self-funded

students. Prestigious universities such as the Universidade de São Paulo (USP), Universidad Nacional Autónoma de México (UNAM), and Universidad de Buenos Aires (UBA) continue to attract regional students seeking globally recognized education. The prevalence of Spanish and Portuguese as the primary languages of instruction also minimizes cultural and academic adaptation challenges, enhancing the appeal of staying within LATAM.

While the number of English-medium programs remains limited, the region's shared languages, affordability, and deepening intergovernmental and institutional ties are collectively fostering stronger intra-LATAM mobility. As regional initiatives continue to expand and universities enhance collaboration, Latin America is gradually positioning itself as a dynamic and inclusive higher education destination for students within its own borders.

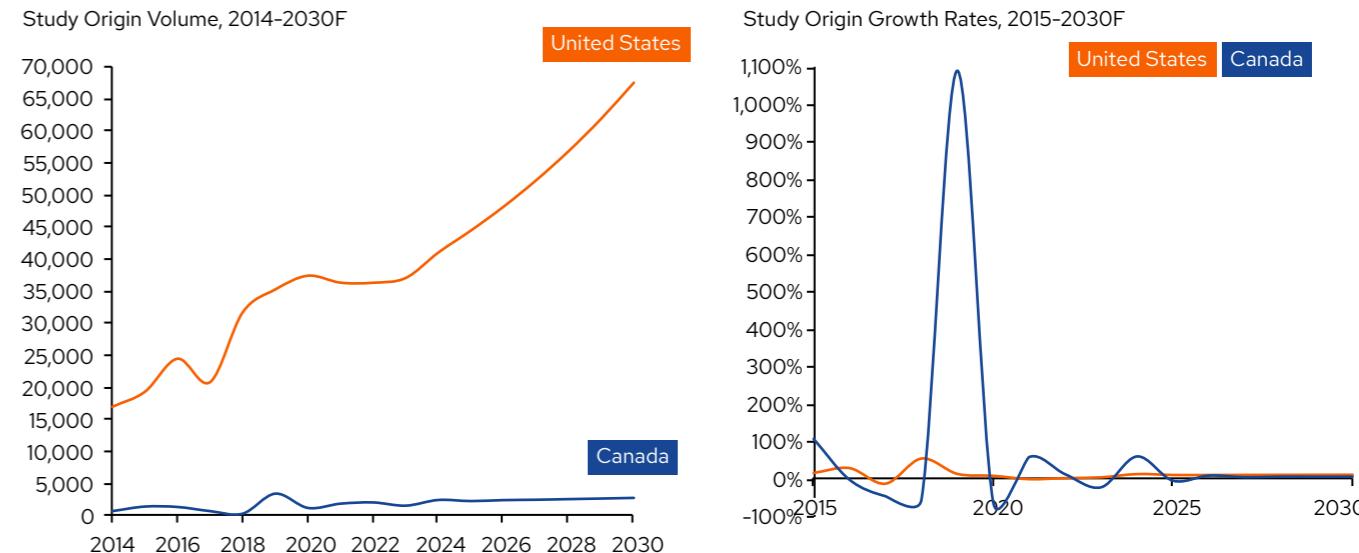
US and Canada

Student flows from the US and Canada to Latin America remain relatively low. While traditional study abroad destinations in Europe and Asia continue to dominate, Latin America is increasingly recognized for its unique combination of academic opportunities, cultural immersion, and affordability. Countries such as Mexico, Brazil, and Argentina are attracting more North American students through targeted programmes and supportive institutional policies.

Argentina is the leading study destination in Latin America for students from the US and Canada. Although enrollments from these countries have declined slightly by about 3-1% over the past five years, projections indicate increases of enrollments by around 2-3% by 2030. Argentina's cultural vibrancy, historical richness, highly ranked institutions in the city of Buenos Aires, and a supportive academic environment, including scholarships and free Spanish language courses, make it an appealing choice for North American students seeking an immersive international experience.

Brazil is also gaining traction as a study destination for North American students. Student flows from the US and Canada to Brazil have increased by nearly 2-8% between 2019 to 2024, with projections indicating a 1% rise from Canada and stable US numbers by 2030. This slower growth can be attributed to several factors. Perceptions of safety in major Brazilian cities, including concerns over crime and personal security, may deter prospective students and their families, making Brazil appear less welcoming compared to other study-abroad options for North American students. Additionally, the limited Portuguese language skills among North American students reduce the pool of those interested in more in-depth study, contrasting with the higher demand for Spanish, which benefits other Latin American destinations.

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



Source: QS Global Student Flows, January 2026

In Mexico, leading institutions such as Tecnológico de Monterrey offer English-taught undergraduate courses, easing the academic transition for US and Canadian students while still providing opportunities for Spanish language learning. Time zone convenience for US and Canadian students, along with Mexico's proximity to the US, allows students to visit family and friends during breaks or emergencies. Multiple airports with direct flights to major US cities further enhance the convenience of returning home for the holidays.

Scholarship programs such as the US Fulbright Programme and the Benjamin A. Gilman International Scholarship support North American students in pursuing study, research, or teaching opportunities across the Latin American region. Legal pathways to work, particularly in teaching English, further enhance Latin America's appeal as a study destination for North American students. Despite these advantages, mobility remains constrained by limited awareness of Latin American programmes and strong competition from traditional destinations.

While North American enrollments in Latin America remain the lowest, the region's affordability, academic offerings, cultural richness, and supportive policies suggest moderate growth. With targeted initiatives and enhanced visibility, Latin America can emerge as a compelling and strategic destination for US and Canadian students seeking immersive, high-quality international education experiences.

Rest of the World

While Asia represents the largest source for international student flows globally, the overall number of Asian students choosing to study in the LATAM region is relatively limited compared to destinations such as the US, UK, Australia, and Canada. With countries such as China, India, and South Korea sending a majority of their students to higher-ranked universities in developed economies, factors such as the balance between affordability and global recognition, career prospects, and ease of migration pathways continue to remain key considerations for students.

Japanese student presence in Brazil has shown increased growth in recent years, with a share of approximately 6% of the country's international student population by 2024. This places Japan amongst the top three sources for student flows to Brazil, driven by diasporas and targeted scholarship initiatives. Further, Bilateral relations and student exchanges between China and Mexico have resulted in steady growth in numbers during recent years. Apart from that, the overall absolute numbers of Asian student enrollments in LATAM remain extremely low. Although growth rates appear relatively positive, numbers typically stem from a low base of less than 1,000. Language barriers continue to constrain the scale of Asian students, contributing to shifting interest towards seeking opportunities elsewhere, with the ease of adaptation remaining a serious concern.

MENA student enrollments in the Latin American region continue to be extremely limited. With the emergence of regional educational hubs and the expanding presence of branch campuses within the Middle East, students are showing a growing preference towards pursuing higher education closer to home. This is further influenced by governments such as Saudi Arabia, investing in domestic universities and initiatives aimed at retaining talent. As a result, Latin America is positioned as a relatively minor destination for MENA students overall.

Although scholarship programs and bilateral partnerships exist for students from Asia and the MENA region, these initiatives remain relatively limited. In addition, the lack of access to English-taught courses and cultural barriers continue to constrain enrollment, positioning LATAM as a niche destination for these international student populations. Growing competition from more established destinations in the West and emerging Asian education hubs diverts the interest of prospective students, leaving the Latin American region comparatively underrepresented as a study destination in global mobility flows.

Outbound Trends

Study Abroad

Outbound mobility from Latin America is undergoing a structural shift as students diversify beyond the traditional Anglophone destinations of the US, UK, Canada, and Australia. This is driven by affordability constraints, restrictive visa policies, and tightening student caps in key English-speaking markets. Rising tuition and accommodation costs, along with measures such as Canada's student caps, Australia's recent increase in visa fees for short-term courses, and the introduction of the Genuine Student test, have made these destinations less accessible.

Europe has emerged as the primary beneficiary of this redirection. Student inflows from Latin America to Europe are projected to grow at an average annual rate of 6% between 2024 and 2030. The region's lower tuition fees, wider availability of scholarships, and greater cultural accessibility have contributed to this growth. Within Latin America, intra-regional flows are also strengthening, with destinations such as Argentina attracting a growing share of students from neighboring countries.

Spain represents the most prominent example of this broader trend. Its international student body is now composed of nearly 60% Latin American students, reflecting strong linguistic and cultural ties. Spain is forecast to record over 7% growth in student enrollments from the region through 2030, led by Colombia, Mexico, Ecuador, and Peru. Interest from Mexico alone rose by nearly 20% in 2024. Portugal and Italy are also gaining steady interest, particularly among Brazilian students.

By contrast, traditional Anglophone markets are showing signs of stagnation. Canada's growth has slowed to an estimated 2.7% CAGR due to affordability challenges and falling visa approval rates, which have contributed to enrollment declines of 18% from Brazil and 19% from Colombia. Australia has seen a contraction in arrivals from the region, largely due to policy shifts that have undermined the ELICOS segment, a popular entry pathway for Latin American students, particularly from Brazil and Colombia.

The composition of student interest is also changing by study level. While language learning remains a core motivation, Latin American students are increasingly pursuing degree programs that emphasize affordability and employability. Interest in language-related studies persists at both undergraduate (18%) and postgraduate (13%) levels, suggesting a continued demand for accessible short-term and foundation programs, now more likely to be sought in Europe or within the region. Historically, postgraduate programs have attracted the majority of Latin American students abroad, though undergraduate mobility is gradually expanding.

Europe's strong portfolio of career-focused and affordable Master's programs, particularly in business and STEM fields, is expected to reinforce this momentum. As students prioritize return on investment and long-term employability, Europe and selected intra-regional destinations are positioned for sustained growth, while the Anglophone countries face pressure to recalibrate cost and policy settings to remain competitive.

Transnational Education

Motivated by the internationalization of higher education and the goal of enhancing global recognition, Latin American universities are progressively expanding their academic presence beyond their national borders through transnational education. Unlike countries in Europe, North America, or China, where universities have established numerous international branch campuses, most Latin American institutions have adopted partnership-based models that allow them to internationalize with lower financial risk.

The most successful and common form of outbound TNE in Latin America is the development of joint or dual degree programs. These programs are typically formed through collaborations with institutions in North America or Europe, enabling students to obtain an internationally recognized qualification while remaining connected to their home institution. Through such initiatives, Latin American universities export their curriculum, faculty expertise, and academic oversight to be delivered in collaboration with a foreign partner in order to enhance their institutional legitimacy and expand their global footprint outside of the region. A joint Master's programme between Universidad del Rosario and Queen Mary University of London is a clear example of how these partnerships operate, combining local and global strengths to deliver high-quality, internationally competitive education.

Leading universities such as Tecnológico de Monterrey in Mexico, Pontificia Universidad Católica in Chile, Universidad Nacional Autónoma de México, and Universidad de los Andes in Colombia have emerged as regional leaders in exporting the Latin American curriculum worldwide through joint and dual degree programs. Their collaborations with prestigious institutions in the US and Europe, including the London School of Economics and Sciences Po, have played a key role in enhancing their international profiles. The appeal of these programs lies in their dual advantage of low cost and increased prestige. They require relatively minimal investment while leveraging the reputation of globally recognized partners to attract students and strengthen the institutions' standing.

Establishing international branch campuses, the most resource-intensive form of TNE, requires substantial investment, strong global brand recognition, and supportive host-country regulations, resources often beyond the reach of many LATAM institutions. Public and private universities frequently lack the funding, infrastructure, and administrative capacity to sustain overseas operations, making branch campuses rare compared with counterparts in high-income countries. As a result, most institutions rely on lower-cost, partnership-based models such as joint or dual degree programs, which allow internationalization with minimal risk.

With growing recognition from governments, Latin American universities are gradually positioning themselves as emerging exporters of higher education, enhancing global visibility and contributing to the international academic landscape through collaboration.

Online and Hybrid Programs

Driven by technological innovation, evolving student expectations, and disruptions following the COVID-19 Pandemic, Latin American higher education institutions are undergoing transformation in the mode of delivery of education. In recent years, the region has seen a shift towards more online and blended learning models, where universities are increasingly integrating digital elements into in-person teaching, with the aim of enhancing flexibility and better alignment of education with career aspirations. As of 2023, 66% of employers value graduates of both online and in-person programs equally, significantly influencing the views of prospective students. This has led to growing interest in online learning opportunities. However, concerns regarding gaps in technical, communication, and leadership skills remain a significant challenge in the rise of distance education.

Countries across the LATAM region, including Colombia, Mexico, and Brazil, are taking the initiative to recognize online and hybrid degree programs through their national accreditation system to keep in line with the growing global trend. In Colombia, for example, approximately half of the new academic programs offered by its higher education institutions have adopted a hybrid model, reflecting the country's commitment towards modernizing higher education. This shift aligns with Colombia's ambitious goal of positioning itself as the best-educated country in Latin America by 2025.

While the LATAM e-learning market is expected to grow at an annual rate of 9% by 2030, the surge in edtech start-ups is transforming access to more flexible and skill-based learning through connections with public systems. Further, Brazil is emerging as a key player in the sphere of online and distance learning, with the establishment of frameworks to ensure the quality of its hybrid higher education in universities across the country. Accordingly, institutions in Brazil are required to request re-accreditation for distance learning programs from the Ministry of Education to ensure systematic evaluation. In 2024, the Pontifícia Universidade Católica do Rio de Janeiro achieved the highest score in the evaluation of institutional re-accreditation for Distance Education (EaD), highlighting the country's commitment to expanding and regulating online and hybrid learning.

Overall, Latin America is taking steps to embrace online and hybrid forms of education. With growing employer recognition, government support, and innovative EdTech ecosystems, the region is positioning itself to keep pace with global trends - complementing traditional in-person learning with the integration of flexible, easily accessible, and digitally enabled pathways for education.

The Three Scenarios for 2030

And How They Impact Latin America



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

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

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

Regulated Regionalism

Regulated Regionalism would mean international education in Latin America becomes even more regionally concentrated and guided by formal national policy frameworks. In this model, major host countries such as Chile, Argentina, Mexico, and Brazil adopt structured systems to manage international student enrollments through transparent and regularly reviewed thresholds. These thresholds are adjusted based on factors such as housing availability, institutional capacity (particularly for Spanish and Portuguese instruction), and alignment with national and regional labor market priorities. Higher education institutions are expected to demonstrate their capacity to support international students and to deliver programs that meet identified skills needs, including green technologies, the digital economy, and public health, in order to maintain or expand their student allocations.

As overall demand for higher education rises, student mobility in the region becomes increasingly intra-regional. Students from Central America, the Caribbean, and the Andean countries are choosing high-quality universities within Latin America, encouraged by shared languages, cultural familiarity, and lower costs. At the same time, governments such as those of Colombia, Peru, Uruguay, and Costa Rica are investing in higher education infrastructure and attracting international branch campuses from North America and Europe. These governments are also advancing transnational education partnerships with regional universities. Expanded credit recognition systems and multilateral frameworks, including MERCOSUR education

agreements and Central American integration initiatives, support these developments by enabling more flexible movement between institutions and across borders.

This model of regulated, regionally focused, international education reduces financial and logistical barriers for students while maintaining quality and accessibility. It also helps governments manage urban pressures and direct student inflows toward priority sectors linked to regional development goals.

Overall, Regulated Regionalism represents a coordinated approach to international student mobility in Latin America. It emphasizes policy coherence, capacity management, and regional collaboration while reinforcing the region's ability to retain talent and strengthen its higher education ecosystem.

Hybrid Multiversity

Hybrid Multiversity outlines a scenario in which international education in Latin America is delivered through coordinated, multi-site models that combine online, local, and regional or global learning experiences. In this model, many students complete a significant portion of their degree - often up to half - within their home country, occurring online or through a local partner institution, such as a domestic university collaborating with a larger regional institution in Brazil, Mexico, or Chile.

Shorter, structured periods of intra-regional study abroad remain an essential part of this model. These experiences focus on activities that depend on direct engagement, including internships, experiential learning, laboratory research, clinical training, language immersion, and professional networking across the region.

Universities across LATAM expand the use of shared credit transfer systems, such as the voluntary SICA (Sistema de Créditos Académicos), harmonized curricula, and joint quality assurance frameworks supported by organizations such as the Inter-American Development Bank and UNESCO IESALC. Cross-border collaboration among faculties helps align learning outcomes, assessment schedules, and moderation practices. This alignment allows students to transition between delivery sites with minimal disruption. The physical campus becomes a specialized learning space, focused on facilities and experiences that cannot be replicated online, such as biotechnology laboratories, design studios, and workplace-integrated training environments.

Career development is embedded throughout the academic journey. Micro-credentials in areas such as digital skills, sustainable development, and industry-specific certifications are increasingly integrated into degree programs in countries including Brazil, Mexico, and Colombia. These credentials are recorded in student transcripts, giving employers clearer insight into student competencies. Many programs combine remote internships during the home study phase with in-person placements during the regional mobility phase, improving pathways into graduate employment within the expanding regional labour market. Policymakers support this model by simplifying mobility processes, building on frameworks such as the MERCOSUR educational agreements, streamlining visa procedures, and formally recognizing hybrid and online components for post-study work eligibility.

The Hybrid Multiversity model promotes a more flexible, affordable, and coordinated approach to international education in Latin America. It maintains academic quality and regional relevance while expanding access for students with financial constraints, strengthening institutional digital capacity, and aligning education more closely with the evolving skills needs of the regional economy.

Talent Race Rebound

Talent Race Rebound describes a scenario in which international education in Latin America becomes a central tool for attracting and retaining skilled talent in response to structural workforce shortages and the need for economic diversification. By 2030, major destination countries such as Mexico, Brazil, Chile, and Colombia will have implemented targeted policies to address skills gaps in areas including data science, sustainable energy and green technologies, biotechnology, advanced logistics, and digital health.

Administrative bottlenecks that limited mobility in previous decades have been replaced by streamlined, talent-focused systems. High-skill student visas are processed efficiently, and extended post-study work rights in strategic STEM fields are explicitly linked to structured points-based migration or residency pathways within host countries.

Universities align closely with government and industry priorities. Public and regional scholarship programs focus on priority sectors, while private partners support high-value regional internships and offer employment opportunities to graduates in specialized fields. Research ecosystems are strengthened through multi-year public grants and targeted infrastructure funding, addressing regional challenges such as water scarcity and tropical diseases, and enhancing institutional attractiveness for faculty and students across LATAM.

Infrastructure constraints, including student accommodation and digital connectivity, are mitigated through public-private partnerships and incentives to decentralize research centers. This allows for increased enrollment and a more balanced geographic distribution of students and research activity.

For international students from both the region and global markets, the model offers full-degree, on-campus study combined with professional networks, practical experience, and pathways to long-term employment and residency in high-growth Latin American economies. Demand rises sharply from within LATAM as well as from emerging markets such as India and Africa. International education in this scenario functions as a strategic mechanism to develop, attract, and retain high-value human capital within the region.

Drivers for Growth

As Growth Slows, How Can Latin American Universities Recruit More Effectively?

- A focus on skills
- Building an international reputation for excellence

Labour Market Dynamics

Labour markets across Latin America are shaped by structural diversity, demographic change, and uneven economic development. The region has a relatively young population and expanding urban labour force, but employment outcomes are constrained by low productivity, limited job creation in high-value sectors, and persistent inequality.

Although unemployment in Latin America and the Caribbean reached historically low levels of around 6% in 2025 (International Labour Organization), this masks deeper problems of job quality and informal employment, which constrain productivity and economic resilience. Nearly 46.7% of all workers are in informal jobs, rising to about 56% for young workers, meaning they lack formal contracts, social protection, and stable incomes, which suppresses earnings and productivity gains across the region.

Youth unemployment remains a significant challenge, with the labour force aged 15–24 experiencing rates that are roughly three times higher than adults', despite some recent improvements.

Informality also tends to be very high in specific countries: for example, informality rates exceed 70% in Peru and hover around 60% in Colombia and Ecuador, according to World Bank and OECD data, severely limiting productivity and access to secure work.

Underlying these labour issues is broader slow economic growth and low productivity momentum: average GDP per capita growth has hovered near modest long-term potential, reflecting limited structural transformation and a heavy reliance on low-value production, according to the OECD.

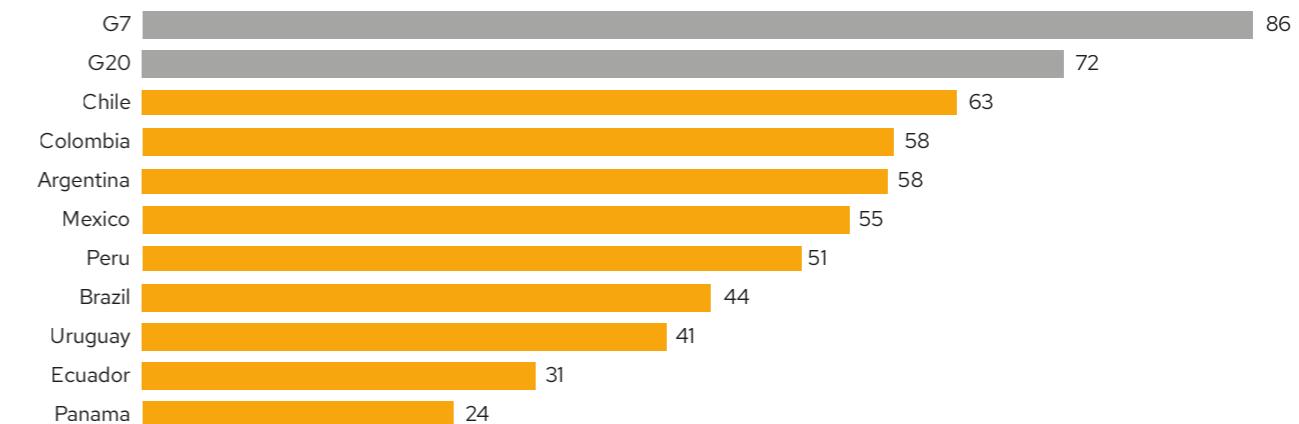
Income inequality remains high, with formal labour markets characterized by wage disparities and unequal access to quality jobs, reinforcing exclusion and limiting social mobility.

Higher education has a critical role to play in addressing these challenges. Universities can help reduce skills mismatches by aligning curricula more closely with labour-market demand, particularly in digital skills, applied engineering, logistics, and green technologies. Stronger partnerships with employers can expand internships, cooperative education, and applied research projects that improve graduate employability.

In addition, higher education institutions can support entrepreneurship and innovation, helping graduates create formal employment through start-ups and small businesses, especially in knowledge-based and service sectors. Expanding access to short-cycle degrees, technical pathways, and micro-credentials can also help working adults and informal workers upskill and transition into formal employment.

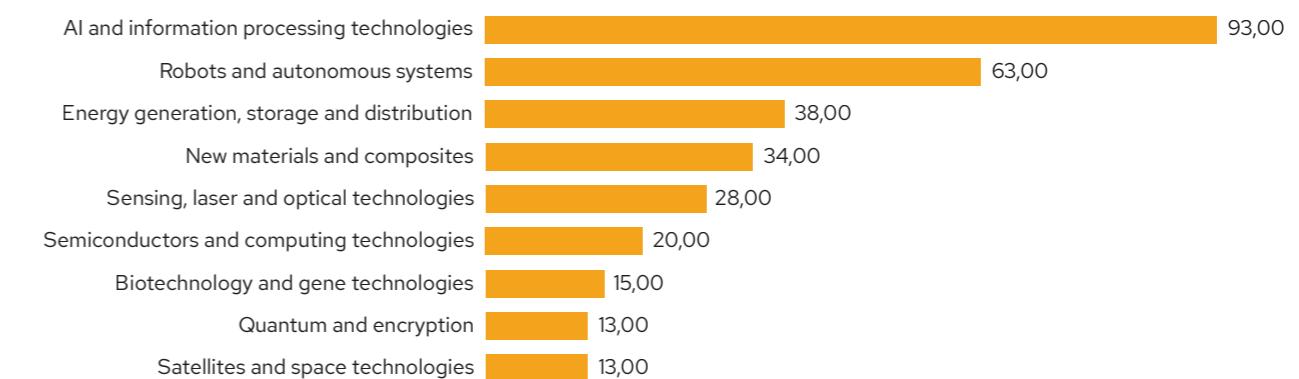
By improving quality, relevance, and accessibility, higher education can act as a catalyst for productivity growth, reduced informality, and more inclusive economic development across Latin America.

Figure 12. Skills Fit Indicator Latam (Normalized Score out of 100)



Source: QS World Future Skills Index 2025

Figure 13. Share of Organizations Surveyed that Identify the Technology Trend as Likely to Drive Business Transformation



Source: World Economic Forum Future of Jobs Report 2025

International Student Trends

**Using Insights Into What Students Want to
Future-Proof Your Strategy**

Reputation Increasingly Influencing Student Choice

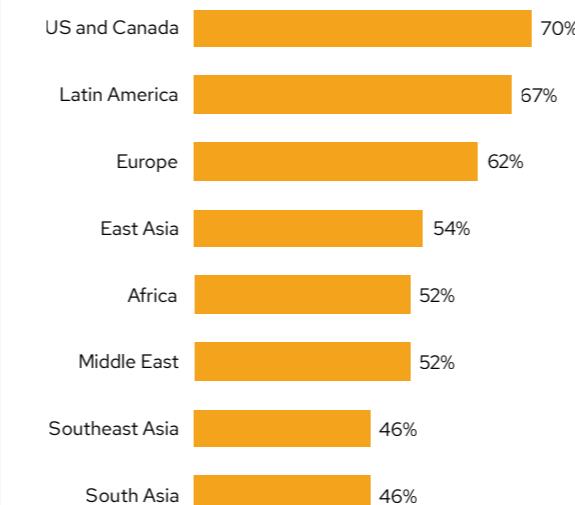
For students looking to study in Latin America, institutional reputation is of paramount importance when making study decisions. Over half of all students cite reputation as an important factor when choosing a university, however this rises to 67% and 70% for candidates from Latin America and the US and Canada respectively. Both these regions will be crucial in determining inbound and intra-regional flows for Latin America, therefore the ability for institutions to communicate and preserve their reputation credentials will be an essential component of their ability to harness the potential of these student flows (Figure 14).

For Latin American institutions, the importance of reputation to student decision-making comes at a challenging time for their respective higher education sectors. Since 2017, the median Employer Reputation rank of Brazilian institutions has declined by over 140 positions, whilst Argentinian institutions have also seen a less drastic, but still significant decline of 35 places (Figure 15).

The Academic Reputation of institutions in both of these markets has remained more stable, however, Brazil has seen the median rank of institutions improve by a modest 19 places and in Argentina by two places (Figure 16). Nevertheless, concerted efforts will need to be made to enable institutions from across the region to establish a more positive reputation narrative when communicating with their prospective students.

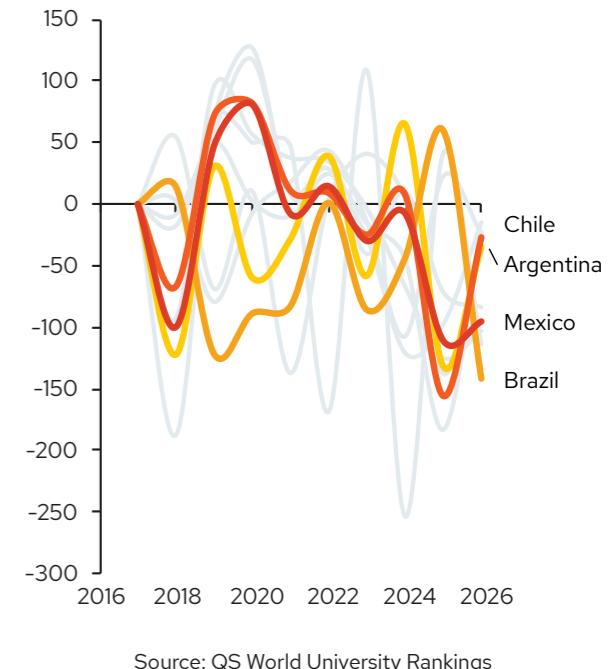
This will help those institutions challenge the hegemony of the 'Big Four' student destinations as they can offer a high-quality education at a fraction of the cost of Anglophone destinations. In doing so they can harness the potential of shifting international student flows in what is a rapidly changing recruitment landscape.

Figure 14. Importance of Reputation to Students When Choosing a University



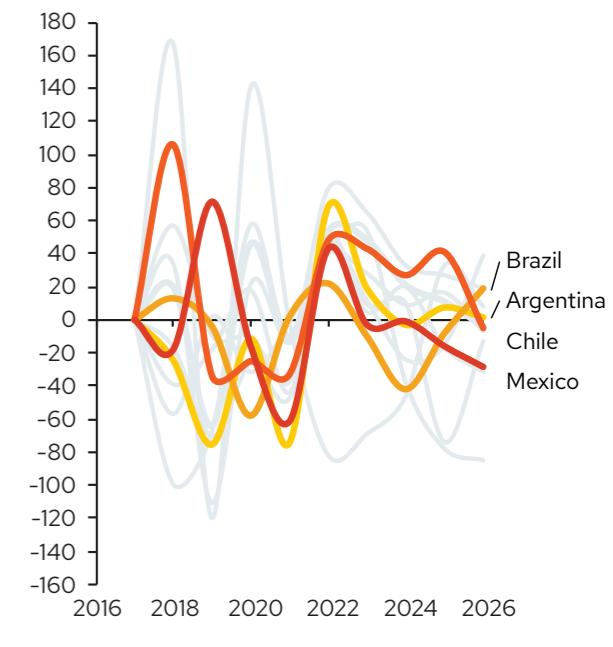
Source: QS International Student Survey 2025

Figure 15. Change in Median Employer Reputation Rank since 2017



Source: QS World University Rankings

Figure 16. Change in Median Academic Reputation Rank since 2017



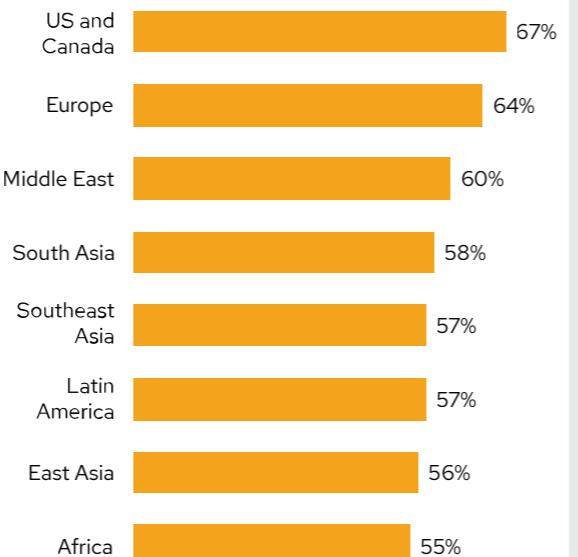
Source: QS World University Rankings

Employability on Students' Minds

When making study decisions, there is clear evidence that student choice is increasingly driven by post-study employment outcomes. When asked which topics were most useful in helping them make decisions about where to study, nearly half of all students looking at Latin America cited information on work placements and links to industry – making it the third most popular answer overall. Its importance is also especially prominent amongst students from Africa and South Asia, two regions which will be the dominant source of international students worldwide in the next five years. Such attitudes give credence to the notion that the declining reputation of Latin American institutions amongst graduate employers is an issue which needs urgent attention.

Skills development is another area which warrants further consideration. The ability to learn new skills for their career was a priority for over 50% of Latin-American bound students when deciding on a course (Figure 17).

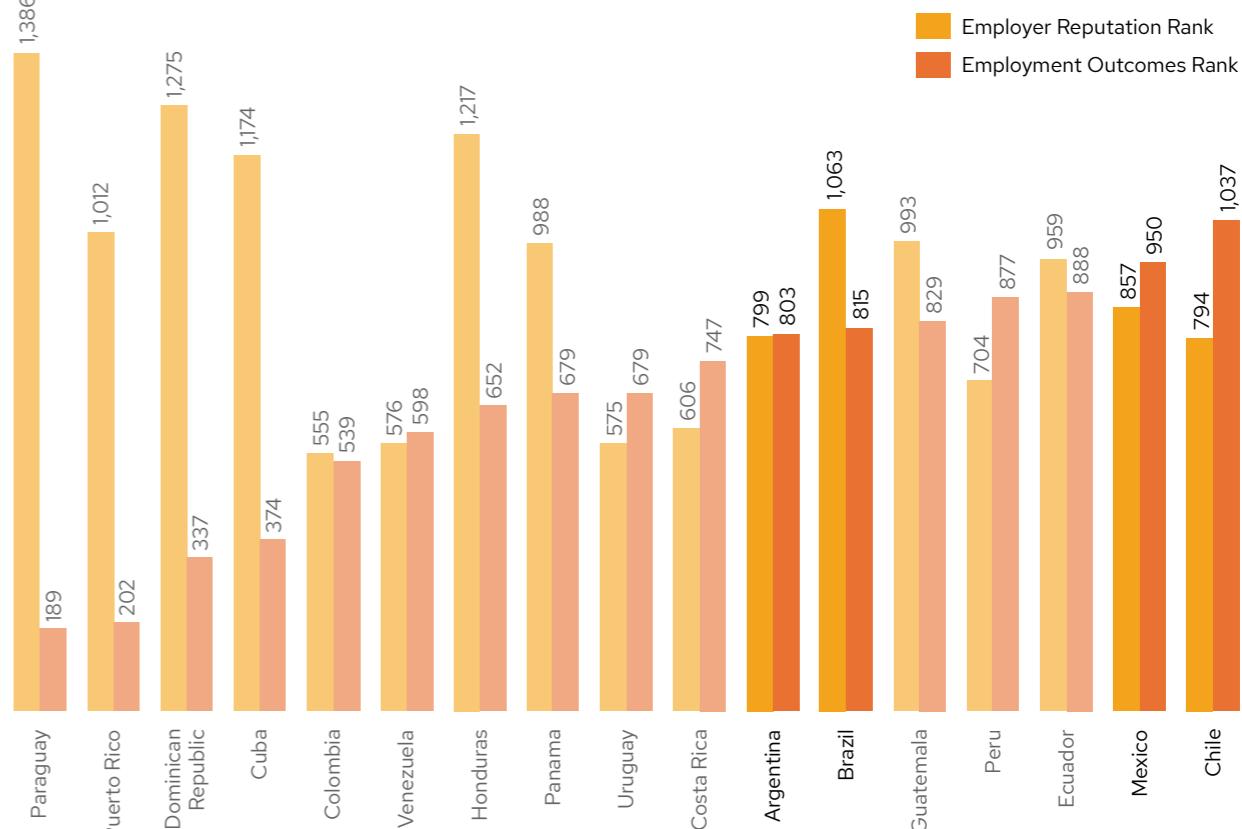
Figure 17. Career Considerations When Choosing a Course % Of Students Selecting "It Allows Me to Learn New Skills"



Source: QS International Student Survey 2025

When considering the outcomes of their graduates, institutions need to consider their reputation amongst employers, as the relationship between the two is crucial. Across many Latin American destinations, institutions tend to rank higher in graduate outcomes than their reputation amongst employers would suggest (Figure 18). This disparity suggests that whilst institutions are providing graduates with the skills needed to be hired by employers, they aren't leveraging those positive outcomes to better their global reputation. Institutions need to consider how they craft a positive narrative amongst their employers using their graduate outcomes and skills development portfolios to address this imbalance. Ensuring that graduates have the appropriate mix of skills to continue to meet the demands of employers should be central to future curricula design. Institutions can enhance their reputation amongst employers by establishing this narrative upfront and in doing so, can transform their capacity to become agents of further economic growth in the region.

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



Source: QS World University Rankings 2026

Strategic Imperatives

Given the shifting dynamics of global student mobility, scenario planning enables Latin American institutions to anticipate risks, test strategies, and adapt to multiple possible futures. By considering alternative scenarios, such as Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound, universities can build resilience and ensure long-term competitiveness.

Diversify Recruitment and Partnerships

Intra-regional mobility is already crucial to student flows in LATAM, but deepening engagement with neighboring countries, expanding European connections, and investing in partnership-led transnational education (TNE) models will drive flows through to 2030.

Accelerate Flexible and Digital Learning Pathways

To remain competitive and accessible, universities must scale up online, hybrid, and modular programs, ensuring quality and recognition through robust accreditation and employer engagement. Embracing flexible delivery will attract a broader range of students and support lifelong learning in the maturing labour market of Latin America.

Forge Stronger Links Between Education and Industry

It's key that LATAM institutions align curricula with regional labour market needs, embed work placements and micro-credentials into courses, and actively promote graduate outcomes to employers. By making employability central to their value proposition, institutions can enhance their reputation, support economic development, and attract students seeking clear career pathways.

Methodology

Global Student Flows

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

Open Source Framework

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

The qualitative research process is informed by extensive interviews with global experts, including economists, policy leaders, and institutional decision-makers. These contributors provide deep contextual insight

into specific country-to-country flows, policy settings, and sectoral trends. Quantitative analysis is anchored in both historical datasets and current indicators, supported by HolonIQ by QS's proprietary global flows model. This model employs advanced analytics to simulate multi-factor, high-dimensional data across more than 4,000 unique international student flows.

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

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

Push Factors: Drivers of Outbound Mobility From Source Countries

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

Demographics

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

Economic Conditions

The economic context of the source country directly impacts the capacity of individuals to finance international study. A slow economy, low gross domestic product (GDP) per capita,

poor income distribution and overall household wealth can all motivate students to seek more prosperous environments abroad.

Loans & Scholarships

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

Domestic Alternatives

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

Risk Factors

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

Pull Factors: Determinants of Destination Market Attractiveness

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

Academic Quality

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

Post-Graduation Prospects

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

Affordability (inc. FX)

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

Recruitment Infrastructure

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

Safety & Security

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

Disruption Factors: Drivers of Volatility and Alternative Mobility Scenarios

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

Geopolitical Factors

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

Place-Based Risks

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

Capacity Constraints

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

Hybrid Programs

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

Online Learning

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

Mapping Flows

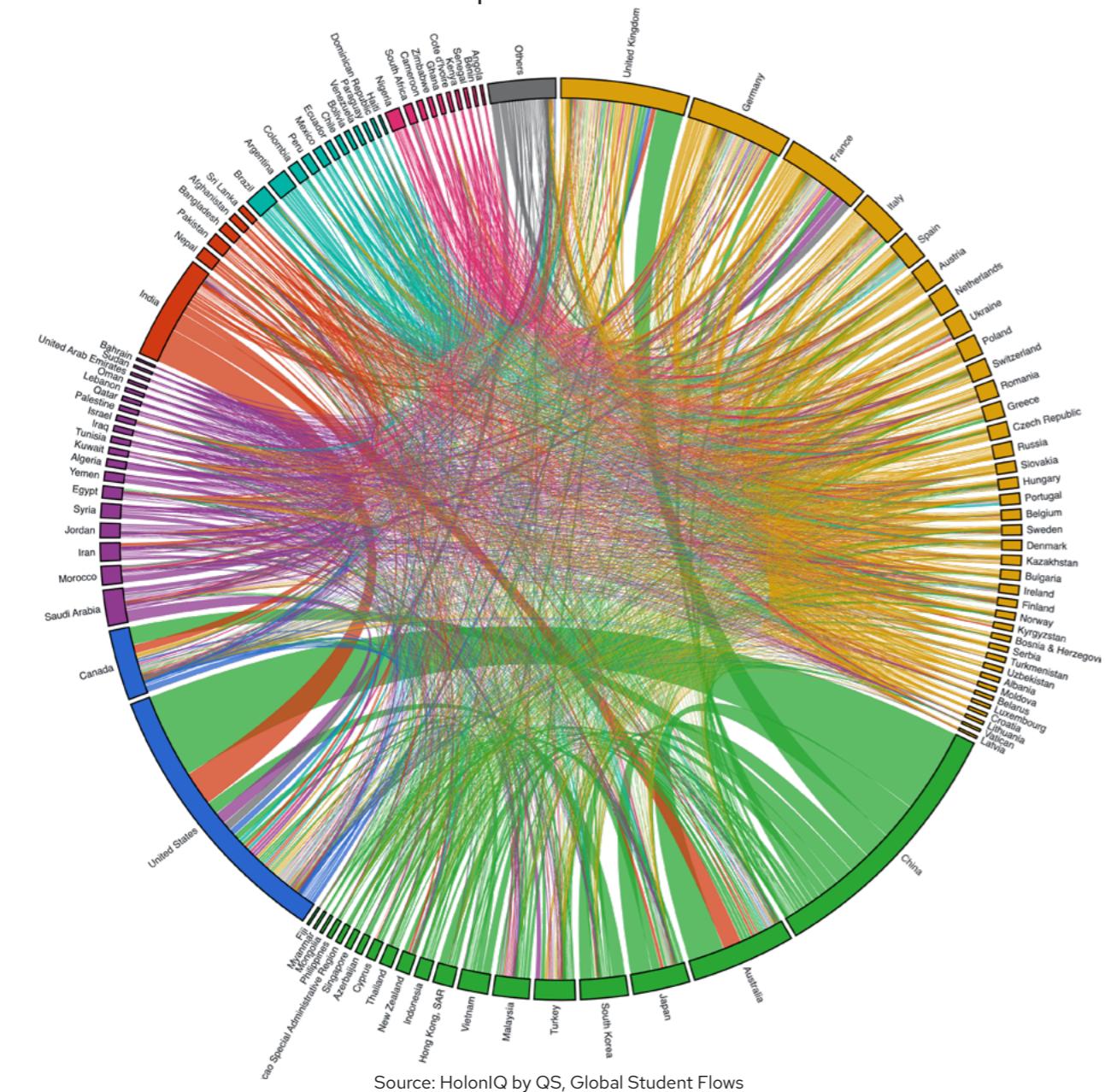
HolonIQ by QS has developed proprietary technology to map and analyze the complexity of global student mobility and cross-border flows. Each year, over seven million students travel from more than 150 source countries to study in over 100 destination countries, representing more than 4,000 unique country-to-country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

The platform enables users to analyze over 4,000 discrete flows over time, identifying trends and patterns that inform strategic

planning, policy development, and investment decisions. The platform is designed to simplify the management, evaluation, and forecasting of international mobility and related datasets.

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

Global Student Flows Interactive Flows Explorer Tool



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

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

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

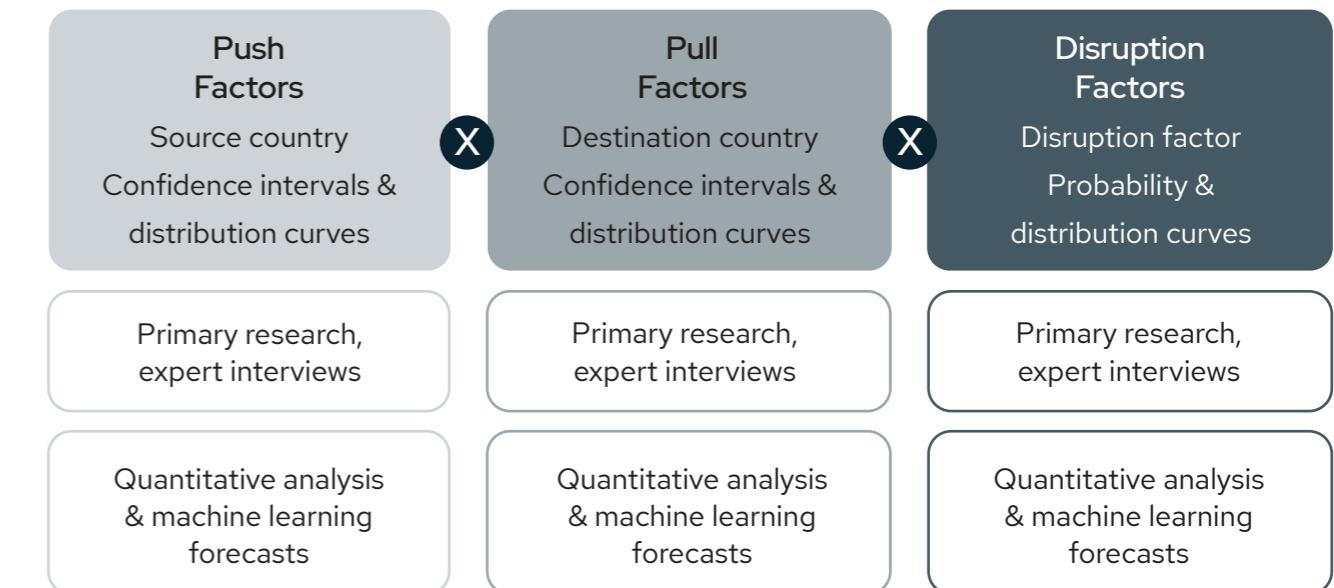
Each factor is associated with a statistical distribution and confidence interval derived from a combination of primary expert interviews and historical quantitative data. Push and pull factors each generate growth rate distributions for every source and destination country respectively, while disruption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

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

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

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

Global Student Flows: Open-Source Framework



Source: QS, Global Student Flows. This work is licensed under CC BY-SA 4.0

QS International Student Survey

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

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

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

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

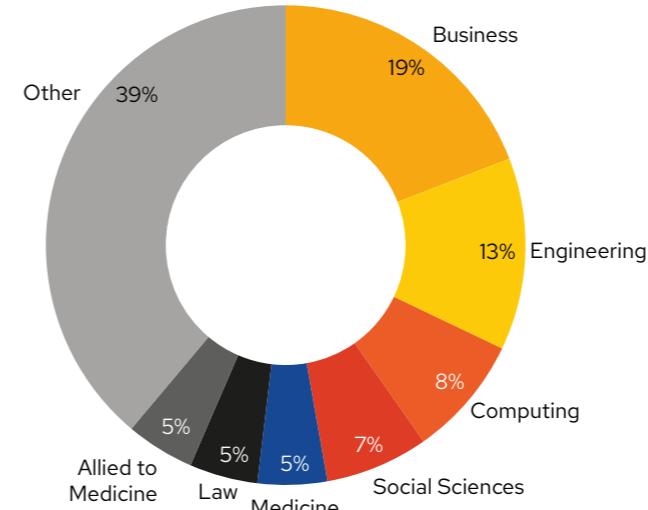
The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 146 universities worldwide, who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

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

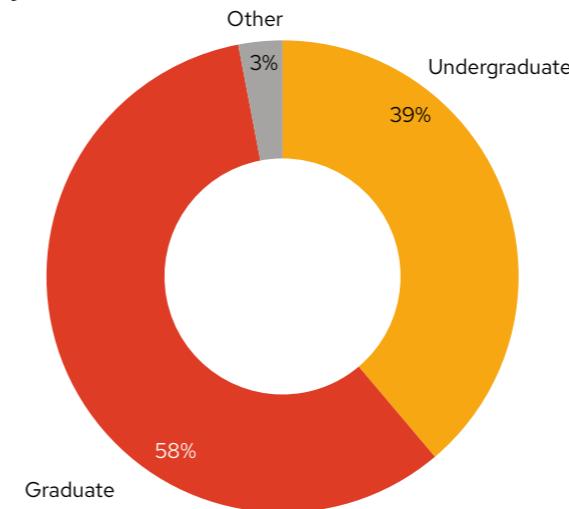
The 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution who took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey Respondent Demographics

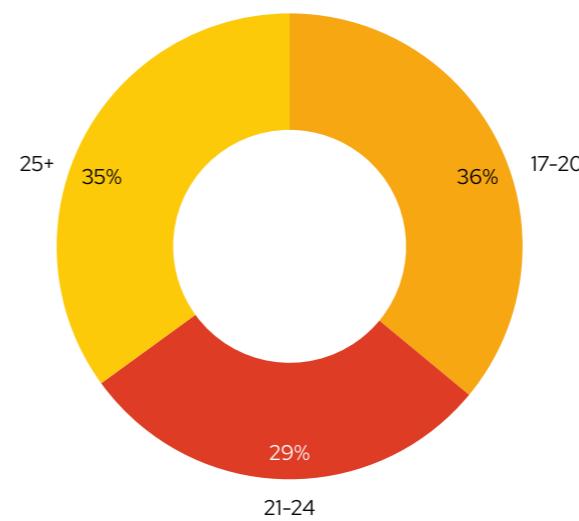
Subject Preference



Study Level



Age



Source: QS Global Student Flows, October 2025

Sign up for the
QS International
Student Survey
2026



Sources

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

Key sources include:

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