

Recruiting students from India

Market evidence and priorities for universities



Publication information

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Purpose and scope

This report examines outbound Indian student demand and recruitment decisions, primarily for universities in the United States, United Kingdom, Canada and Australia. It uses the latest releases available by February 2026 and considers India's different cities, course levels and financing conditions. It is intended for university recruitment, admissions, student support and leadership teams.

Research approach

This report synthesises official statistics, government guidance and original research available by its stated evidence date. Sources are numbered in the text and linked at the end. National datasets count different populations and stages; definitions appear beside each comparison. Calculations and Merta recommendations are distinguished from reported results.

This is a selective review of published evidence, not new institutional fieldwork, a systematic review or an evaluation of Merta's products.

Interpretation and use

Findings from one institution or population may not transfer to another. Policy summaries reflect the report date; current official guidance should govern individual cases. Recommendations should be tested against an institution's own applicants, service capacity and outcomes. A cited organisation does not endorse Merta.

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Executive findings

India is a very large outbound market, but it is not one uniform audience. The Ministry of External Affairs estimated nearly **1.25 million Indian nationals pursuing higher education abroad** as of January 2025. That is a stock estimate across destinations, not the number leaving in a year. US Open Doors recorded **363,019 Indian students** in 2024/25, up about 10%; its definition includes participants in Optional Practical Training. In the UK, Indian students remained the largest non-EU origin in 2024/25, but HESA reported falling enrolments since 2022/23. [1,3,5]

Destination conditions diverge. The US retained large Indian graduate and work-training cohorts. The UK granted 95,231 sponsored study visas to Indian main applicants in the year ending December 2025. Australia counted 93,874 Indian higher education students in 2024 on a PRISMS measure. Canada's earlier rapid growth faced a cap and a planned 2026 limit on new arrivals. These are stocks, visa grants and planning figures respectively, and cannot be summed into a single annual Indian outflow. [3,6,7,10]

The purchase is consequential. Course credibility, employability, total cost and credible post-study options shape the decision. Financing often depends on household resources, loans and currency exposure. In UK visa data for the year ending March 2025, 81% of Indian study-route students came for master's level study, against 59% of Chinese students. This course-level difference should change how universities recruit and support applicants. [12,14]

Recruitment priority: make the programme-level return on investment legible, show complete costs and realistic career pathways, develop city and institution partnerships beyond one national media campaign, and provide direct university support through funding, visa and arrival stages. Track conversion and continuation by course, city, channel and scholarship status rather than relying on lead volume.

The country's scale can tempt an institution to optimise for submitted applications. The more useful question is how many academically suitable students it can assess promptly, help fund realistically and support through to continuation. A course that enrolls a smaller Indian cohort with clear prerequisites and strong outcomes may be strategically better than one producing many late offers and visa-stage withdrawals. Recruitment investment should be tied to capacity in admissions, finance, international advice and student services, all measured in the same intake.

Read the numbers before drawing a trend

India’s outbound market is described by several incompatible measures. MEA’s nearly 1.25 million figure estimates Indian students already pursuing higher education abroad in January 2025; the destination annexure records nationals in tertiary institutions and sometimes separate school populations. Open Doors counts Indian students at US higher education institutions on qualifying visas, including Optional Practical Training. HESA reports student enrolments by permanent address; UK Home Office data count visa grants to applicants. PRISMS counts Australian student-visa study activity. [1,2,3,5,6,7]

Measure	Latest figure available by February 2026	What it means
Indians in higher education abroad	Nearly 1.25m, Jan 2025 [1]	MEA estimate of stock across destinations.
Indian students in the US	363,019, 2024/25 [3]	Open Doors stock including OPT; +9.5% on 2023/24.
UK study visas to Indian main applicants	95,231, year ending Dec 2025 [6]	Annual visa grants, not census enrolments.
Indian higher education students in Australia	93,874, 2024 [7]	PRISMS onshore higher education study count.

Table 1. Indicators illuminate different parts of the market and are not additive.

For a recruitment forecast, use an institution’s own matched intake series: qualified enquiries, complete applications, offers, cleared conditions, paid deposits, visas, arrivals and census students. A national rise in continuing students can coexist with falling new entrants. A visa grant can be unused. A student can apply to several countries. Publish the denominator whenever stating a conversion rate.

The source definitions create a common planning trap. An MEA estimate of Indians abroad is not the annual number entering a UK or US classroom, and Open Doors’ inclusion of OPT means its student total contains people no longer taking courses. Report these measures side by side rather than converting them into a false market share. If leadership needs a forecast for a September intake, the institution’s prior September cohorts and current offer-holder milestones are more relevant than a global stock figure.

How India reached this point

US demand rose strongly after the pandemic. Open Doors counted 268,923 Indian students in 2022/23, 331,602 in 2023/24 and 363,019 in 2024/25. The last increase was 9.5% and India became the largest origin. The 2024/25 stock can remain high even if fresh starts slow because graduate students and OPT participants carry over. Universities should inspect new starts and academic level, not only the headline. [3,4]

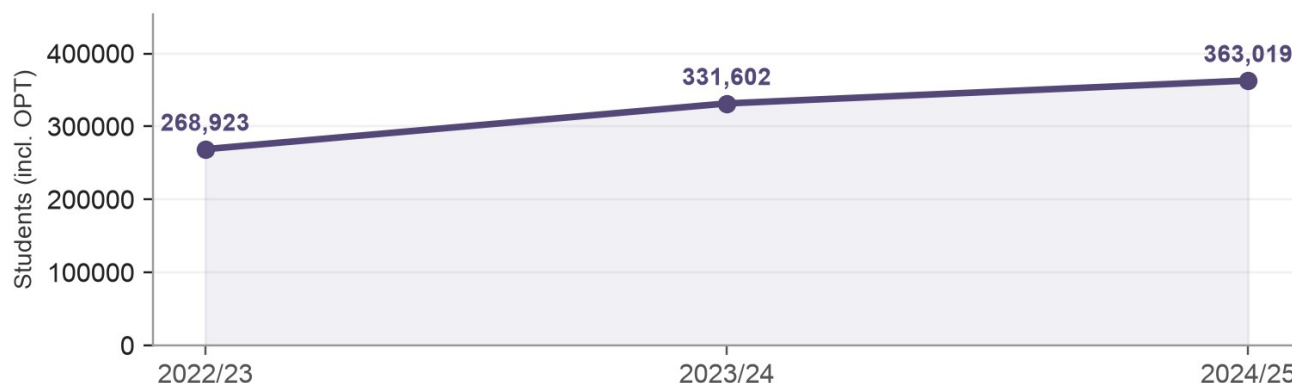


Figure 1. Open Doors Indian student stock in US higher education, including Optional Practical Training. Academic years; not annual new arrivals. [4]

In the UK, Indian growth accelerated earlier and then softened. HESA reported a 15% decline in new Indian entrants in 2023/24; its January 2026 release states that Indian enrolments declined from the 2022/23 level. Home Office visa grants for the year ending December 2025 placed India first among nationalities, showing continued scale, but a visa flow is not the same cohort as HESA's 2024/25 enrolments. [5,6,20]

Australia's 2024 government brief recorded 93,874 Indian higher education students, 18.8% of its international higher education cohort. Its broader international education system includes vocational and English-language pathways, so university strategists should avoid using all-sector enrolments to infer university course demand. Changes in offshore visa priority can affect timing without changing a student's academic interest. [7,17]

Canada grew rapidly through both university and college routes: IRCC counted 427,083 Indian study-permit holders at the end of 2023, compared with 218,522 in 2019. These totals include multiple levels of study and reflect residence at a date. The 2024 cap and 2026 planned volumes mark a different policy environment. A university recruiting from India should therefore run separate Canada forecasts for eligible programmes, attestation requirements and available processing time. [9,10]

One country, many recruitment markets

India's large cities, fast-growing secondary cities, languages, qualifications and household incomes create very different applicant journeys. British Council mapping using institutional data and interviews found that growth in international demand was extending through economically expanding cities, rather than being explained by a single national metropolitan segment. Its conclusions reflect the data and participating institutions studied; they are a route to segmentation, not a definitive national ranking of cities. [11]

Develop a geography of **student origin, not event attendance**. Record home city and state, prior institution, degree, preferred destination, and whether the applicant is a first-generation international traveller. Compare programme-level offer and enrolment rates by city. A busy exhibition may generate applications but few prepared students; a smaller partnership with a trusted college may yield stronger fit. Do not extrapolate a city's results to the whole state.

Relationships matter at several levels: academic departments can build feeder arrangements around curricula and research; alumni can speak to career and living realities; current students can explain arrival; authorised staff can handle funding and immigration process. Each role needs a clear boundary. An alumni success story should include the course, graduation year and labour-market context rather than imply a guaranteed outcome for a new applicant.

Language choice should be practical. English may be the instruction language, yet concise explanations of fees, deposits and conditions in a family's preferred language can reduce misunderstanding. Keep the official English contract and a controlled translation side by side. Mobile-first information and evening contact hours may matter, but should be validated against the institution's own engagement and accessibility data.

The city strategy should also reflect service logistics. A university may have strong applications from a place but no approved partner able to explain the course accurately or support document collection. Before opening another office or signing a new agent, compare response times, qualification assessment load and student complaints for the existing route. Build a small local feedback panel of schools, alumni and applicants. Its purpose is to test assumptions about language and course demand, not to produce a national survey from a convenient sample.

What Indian students want to study

The US Indian cohort is concentrated in graduate education and related training, but its profile is not exhausted by “STEM.” Open Doors’ country fact sheet gives academic-level history; its field-by-origin tables allow institutions to inspect engineering, mathematics and computer science, business, health and other fields separately. The UK route is particularly master’s heavy: 81% of Indian study visa recipients in the year ending March 2025 were coming for master’s level study, according to the Home Office. [4,13,14]

Demand for a programme depends on the credible next step. A taught master’s applicant may ask whether the curriculum matches a job family, whether project work has employers involved, and how alumni fared in India as well as abroad. A research applicant may care more about supervisor fit, funding stability and publication infrastructure. A bachelor’s applicant and family may need detailed support on safety, housing and four-year cost. Universities should present these propositions separately rather than make one India brochure do all three.

Employment claims need careful denominators. Report the share of graduates responding to a survey, the year, degree, location and whether outcomes are self-reported. Do not confuse permission to seek post-study work with access to a job, nor an internship opportunity with a guaranteed placement. Explain licensing barriers for regulated professions. Where a course serves Indian employers and returning graduates, show that evidence rather than assuming every student intends migration.

Academic fit also includes qualifications and preparedness. Publish transparent entry equivalencies and prerequisite examples, a way to ask about unusual degrees, and early decisions on conditional requirements. An offer that arrives late or remains vague can lose a good student even when the programme itself is attractive.

Subject interest should be interpreted with level and employment context. Computer science applicants may be seeking research, a professional conversion course or an undergraduate foundation; those are different products with different prerequisites. Management applicants may value industry projects but need evidence about actual access to them. Publish sample modules and assessment tasks, and show whether an internship is required, optional, competitive or unavailable to some visa holders. This specificity lets students compare programmes fairly and reduces unsuitable applications.

Costs, financing and risk

Total cost is the central practical test for many families: tuition across the full course, living expenses, required insurance, visa and health charges, travel, deposits and currency movements. A 2020 British Council survey found 57% of its Indian respondents “very concerned” about finances. That study was during COVID-19 and should not be presented as a 2026 prevalence estimate; it supports the longstanding salience of affordability. [12]

An institution should offer an itemised first-year cash timeline as well as total-course cost. The student may need funds before a scholarship is paid or before part-time work is possible. Show how and when an award is applied, whether it renews, the conditions for maintaining it, and what happens if a visa is refused. A small tuition discount does not solve a living-cost shortfall or an up-front proof-of-funds requirement.

Loans introduce more questions: lender eligibility, co-signer or collateral, repayment start, currency, disbursement date and whether the lender’s documentation satisfies the destination’s requirements. Universities should explain their own invoice and refund rules, while leaving individual loan and immigration advice to qualified providers. Keep a student’s financial details private; a recruitment agent or ambassador does not need the full household file.

Scholarship policy should target a real barrier and measure net outcomes. Compare recipients with appropriately similar non-recipients, or use a fair lottery among equally eligible students where permitted. Count enrolment, continuation and net revenue after awards, not only offer acceptance. The point is to make study feasible for suitable applicants, not to give a discount to everyone who clicks an email.

Cost information should be refreshed when a fee, accommodation contract or government charge changes. Give an exchange-rate illustration dated to the calculation, not a promise of what the rupee price will be months later. If the university accepts an instalment, explain which part is refundable and when a scholarship is credited. A family should be able to calculate the cash required before travel and the funds needed to finish the course. This is a service design requirement as well as a recruitment message.

Policy and destination choice as of February 2026

Destination rules are active constraints, not a marketing message. Canada's announced 2026 target envisages 155,000 newly arriving students within 408,000 permits that also include extensions, with cohort exemptions and provincial allocations. A university should distinguish a permit target from actual grants and should check a programme's current attestation status before telling an applicant to deposit. [10]

Australia's offshore processing priority for applications lodged from 14 November 2025 is linked to provider allocation status. Home Affairs distinguishes processing priority from grant criteria. Recruiters should therefore avoid promises that one provider can "guarantee" a faster visa or better decision. The practical task is to issue accurate documentation promptly and communicate safe timeframes. [17]

UK Home Office figures for the year ending December 2025 record 95,231 sponsored study visas to Indian main applicants. The figure establishes continued flow, not the probability that a particular Indian offer holder will enrol. Changes to dependent eligibility and post-study arrangements can affect household decisions; universities should publish versioned, dated guidance and refer individual immigration questions to qualified staff. [6]

For the US, the large continuing Indian cohort and graduate interest should not be treated as a promise of fresh arrivals or employment. The Open Doors census counts academic enrolment and OPT differently from visa issuance and new starts. Course fit, finances, appointment availability and official visa guidance all belong in an offer-holder plan. A university should explain where it controls timing and where a government decision maker does. [3,4]

The policy page for Indian applicants should separate three questions: eligibility for the course, the university's sponsorship or confirmation process, and the government's visa decision. Students often receive these as one blended message. Keep the underlying official source and effective date visible. If a visa is still pending near the latest safe arrival, staff should contact the academic team and student with the available options rather than let a marketing team send another generic welcome email.

Agents, trust and the university relationship

Education agents can make a complex process easier by explaining local qualifications, gathering documents and supporting families. They can also introduce conflicts because commissions may depend on enrolment. The UK Migration Advisory Committee reported misleading information from some agents and subagents but lacked enough data to establish prevalence. Institutions should monitor the advice given in their name without assuming misconduct by every partner. [18]

The university must remain visible. Give every applicant an official account that shows offer conditions, documents received, award decisions, fee invoices and the person responsible for an unresolved query. Send important information directly as well as through the agent. State the agent's role and how a student can raise a complaint or ask for a second opinion. Use signed agreements, approved material, training and evidence of corrective action.

Fraud prevention should protect students too. Confirm admissions documents and payment instructions through official university channels. Warn against guarantees of admission, visa or jobs, and against payment to unofficial accounts. MEA advises students to obtain the appropriate study visa and register for consular support. The institution should distinguish a student deceived by a third party from one who knowingly submits false evidence. [16]

Direct recruitment also has a cost. It needs local knowledge, responsive advising, qualification assessment and follow-up across time zones. Compare full acquisition and service cost per enrolled and continuing student, not commission alone. A blended model can work if the university owns its records and decisions and the student can reach it directly.

Partner oversight should include subagents and public claims. Ask students where they first heard about the course, whether they paid a fee to an intermediary, and whether the written university offer matched what they were told. Review websites and event material in the languages used for recruitment. When an error is found, correct the affected student record and message, then address the partner's process. This is more effective than terminating a channel solely because its conversion rate is low.

The student decision after offer

The first month after an offer is a series of solvable questions. Is the offer conditional? What exact evidence clears it? What is the net cost after the award? When is payment due? How does the course connect to work? What housing is realistically available? What happens if the visa is late or refused? An offer-holder who cannot find these answers may retain several alternatives until the last moment.

Build a single checklist with named owners and dates. Acknowledge uploaded documents and distinguish “received” from “approved.” If finance, academic and immigration teams must contribute, preserve the original question in the handoff. Ask why a student has not deposited instead of repeating a payment link. Give a clear deferral and refund pathway, especially when the delay is outside the student’s control.

Use peers for lived experience. Match a current Indian student or alumnus to an offer holder where their programme and interests genuinely overlap. Train ambassadors to describe their own experience, including difficulty, and to hand formal advice to staff. Offer family sessions when requested; do not assume parents should decide for the student. UCAS research on international choice supports the importance of multiple influencers, but it does not prove a universal ambassador conversion uplift. [19]

Measure each support pathway through to census and early continuation. A webinar with high attendance can still have little effect on enrolment if all attendees were already committed. A small intervention may be valuable if it resolves a high-risk visa or financing case. Use a credible comparison where possible and track student-reported clarity as well as enrolment.

A practical offer-holder service can triage by deadline. Unreviewed documents nearing a sponsor deadline require a different response from a student who has just received an offer and wants to meet an alumnus. Record the next action, responsible team and promised response date. Make it easy to see that a document was accepted so reminders stop. Sampling resolved cases for correctness is important; a quick response that repeats an incorrect fee or visa rule can be more damaging than a slower, accurate answer.

Beyond the four English-speaking destinations

Germany illustrates why the Indian outbound market cannot be read only through the US, UK, Canada and Australia. DAAD counted just under **59,000 Indian international students and doctoral candidates** at German universities in winter 2024/25, up about 20% year on year and ahead of China as Germany's largest origin. DAAD also reported growth in English-language degree programmes. Germany's count uses a university-based international-student definition, so it cannot be added to UK visa grants or compared as a share of annual Indian departures. [21]

The student's alternatives may include a lower-cost European degree, a highly selective Indian institution, an employer-sponsored course, online learning or a degree delivered in India by an overseas provider. India's National Education Policy promotes internationalisation and collaboration; actual programme quality and recognition remain institution-specific. An overseas university should therefore articulate what the physical move adds: teaching, research facilities, a professional pathway, a network or a distinctive experience. [22]

Do not assume a destination switch can be inferred from a rise in one country and a fall in another. Different release dates, programme levels and student definitions can produce that appearance. Ask offer holders about their live alternatives, collect reasons for choosing and declining, and revisit the answer by programme. A university recruiting a two-year research degree is not competing on the same basis as a one-year conversion master's.

Where an institution proposes a joint or transnational pathway, publish the award body, delivery site, admissions rules, credit transfer and later travel requirements. A local pathway can widen access and lower risk, but it should not be sold as an automatic visa or a guaranteed campus transfer. Measure whether students receive the promised academic and career benefits.

Europe and transnational study expand the choice set, but the university should not respond by copying a competitor's price alone. Identify what students actually compare: programme length, qualification recognition, language, employment support and the possibility of returning to India. If the institution claims a distinctive research or industry link, give evidence at course level. Ask declined offer holders which alternative they chose when they are willing to say, and keep 'unknown' where they do not. That feedback is more actionable than speculation from aggregate national flows.

Admissions operations can determine the outcome

Indian students may apply to several programmes while gathering degree records, English-language evidence, financial documents and references. A strong applicant can be lost through a slow equivalency decision or an offer condition that is difficult to interpret. The university should publish accepted qualification examples and provide a review route for less familiar institutions or grading systems. Decisions on authenticity and academic equivalence belong to trained staff using source evidence, not to a heuristic based on city or agent channel.

For each offer, show what remains conditional, who is reviewing it and when the student can expect an answer. A student should receive a positive acknowledgement when a document arrives and a separate decision when it is accepted. If a final result will be available only after the standard deadline, staff need a documented late-condition or deferral policy. Repeating the same upload request because teams cannot see each other's records creates avoidable uncertainty.

Funding and visa stages should be coordinated with academic stages. An unconditional offer may be required for a lender or scholarship; a deposit may be needed before a sponsorship document; a visa application may require verified living funds. Map the sequence for each destination and publish the latest safe dates. Tell the student what the university controls, what a third party controls and what happens when timing slips.

Quality assurance requires sampling both agent-assisted and direct cases. Review the accuracy of promised fees, scholarship eligibility, work rights and refund terms. Ask students whether they understood the offer and whether a question went unanswered. Treat complaints as evidence for service design, not merely as a channel score. A student's decision to defer because a required document was unavailable should be recorded separately from a competitive loss.

Scenarios and recruitment economics

Build three scenarios for every priority programme: stable conversion, slower visa or funding clearance, and a drop in qualified demand. Use the institution's own recent cohorts as the baseline, not a national growth rate. Separate offers issued, offers accepted, visas obtained and students at census. A high continuing stock in US Open Doors or an ambitious Canadian permit target cannot supply the missing programme-level yield parameter. [3,10]

Calculate full cost per enrolled student by channel: marketing, events, agent commissions, staff advising, application assessment, scholarships, platforms and refunds, allocated consistently. Then test whether a new partner or direct campaign adds *incremental* students. A lower commission rate may save little if it requires more staff work or recruits students less likely to enrol and continue. A well-supported partnership may be worthwhile even when commission expense is visible.

Revenue forecasts should include tuition actually collected after awards, expected persistence, capacity costs and currency-sensitive pricing where material. Do not count a paid deposit as a full year's tuition. Report refund exposure under a visa delay or refusal scenario. For a scholarship pilot, measure whether awards change the choice of suitable students who would otherwise go elsewhere, not only the high yield among recipients.

The useful early warning indicators are application completeness, days from application to offer, unresolved funding queries, deposit timing, visa status and late arrival. Review them by city, programme and channel each week during peak periods. If one course has strong enquiry volume but poor condition clearance, the remedy may be admissions capacity rather than more advertising.

Forecasts should have a review trigger. If offers are issued later than the previous year, the institution should adjust expected deposits and visa-stage risk before the enrolment target is missed. If a new scholarship raises acceptance but not arrivals, investigate proof-of-funds timing and refund terms. If an agent sends many incomplete files, measure the university's extra assessment cost and student delays. These observations connect recruitment economics to the student journey rather than treating conversion as a single final percentage.

Recruiting priorities for the next intake

Build a programme-market matrix. Separate bachelor's, taught master's and research offers; record home region, prior institution, preferred career path, financing route and destination alternatives. Use the institution's last three intakes to locate real demand and abandonment points. Do not price or message every city and programme as if they were identical.

Publish proof, not promises. For each priority course, show curriculum and prerequisites, project or placement conditions, full cost, scholarship rules, dated graduate outcomes and the support available. Make recognition and licensing limits explicit. Use student and alumni voices to answer practical questions, with no scripted claim that a degree guarantees employment or migration.

Strengthen controlled partnerships. Review agent contracts, approved claims and complaint records. Build academic links with Indian institutions where there is curricular fit. Give direct university access to every applicant regardless of channel. Compare partners on qualified enrolments, persistence and student satisfaction, not just submitted applications.

Test one post-offer change. A city-specific staff clinic, transparent cost calculator, matched peer conversation or targeted award can each be useful. Choose the intervention that fits the observed obstacle and predefine its outcome. Evaluate costs and continuation after enrolment. A good strategy may increase conversion while also reducing unsuitable offers or encouraging an informed deferral.

India's scale will remain attractive, but its growth is not assured at any one university or destination. Recruiters who can explain a programme's real value, manage risk honestly and finish the administrative journey will have a stronger position than those relying on aggregate growth forecasts.

Publish a small scorecard after the intake: unique offers, census students, continuation, median time to a correct answer, unresolved complaints, net scholarship spend and all-in cost by channel. Discuss the results with academic and student-support teams, not only recruiters. A programme may need a clearer curriculum, more housing help or a different entry standard. The next plan should document which change is expected to affect which stage and how its success will be tested.

Sources

Sources were published by the evidence cut-off shown on page 2. Links point to the cited release or study; later updates to a live page may be visible after this edition.

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Build trust across the journey

Earn trust with a clear course proposition, an honest cost picture and support that carries the student from offer to arrival.

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