Jan–Mar 2025 intake

The Global Enrolment Benchmark Survey

Global summary report

NAFSA Connecting People. Changing the World.™ OXFORD TEST OF ENGLISH studyportals Analytics & Consulting

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Part One

Introduction and key findings

About the partners

About NAFSA: Association of International Educators

International education is the cornerstone for building a more understanding and peaceful world. NAFSA serves the needs of more than 10,000 members and international educators from more than 4,300 institutions in more than 170 countries. It is the largest and most comprehensive organization dedicated to international education and exchange, working to advance policies and practices that build global citizens with the knowledge and skills they need to succeed in today's interconnected world.

About Oxford Test of English

The Oxford Test of English, Oxford Test of English Advanced and Oxford Test of English for Schools have been developed by Oxford University Press (OUP) and are endorsed by the University of Oxford. They have undergone years of research, rigor, and quality assurance to ensure they meet the highest standards in English language assessment and join a suite of renowned learning resources published by OUP which empower English language learners across the world.

About Studyportals Analytics and Consulting

Studyportals is the world's most comprehensive study choice platform, helping students to choose their best-fit study across 245,000+ English-taught programmes from 3,500+ institutions in 118 countries. Over 51 million students use Studyportals platforms annually to find and compare their study options across borders and select the right programme. Our goal is to make education choice transparent, globally.

Based on the search and choice behaviour of millions of students, our Analytics and Consulting team provide real-time, forward looking market insights on student interest, institutional offering, pricing, student success, graduate outcomes and the changes in the competitive landscape for international education.

Supporting partners

Canadian Bureau for International Education

European Association for International Education

Asia-Pacific Association for International Education

About the Canadian Bureau for International Education

The Canadian Bureau for International Education (CBIE) is a national, bilingual, not-for-profit, membership organization dedicated to the promotion of Canada's international relations through international education: the free movement of ideas and learners across national boundaries. CBIE's activities comprise scholarship management, civil society and public sector reform, research and information services, advocacy, training programs, professional development for international educators and other services for members and learners.

About the European Association for International Education (EAIE)

Founded in 1989, the European Association for International Education, better known as the EAIE, is the European centre for expertise, networking and resources in the internationalisation of higher education. They are a non-profit, member-led organisation serving individuals actively involved in the internationalisation of their institutions.

About the Asia-Pacific Association for International Education (APAIE)

The Asia-Pacific Association for International Education (APAIE) aims to advance education through enabling greater cooperation between institutions; to enrich and support international programs, activities and exchanges; and to promote the value of international education within the Asia-Pacific region.

The Global Enrolment Benchmark Survey

About the survey

As higher education continues to face rapid shifts in government policies, markets, and student behaviours, having access to timely data is crucial. The Global Enrolment Benchmark Survey Report gives universities the opportunity to compare their performance against their peers, helping them navigate the evolving challenges of international recruitment in today's turbulent environment.

After the success of the inaugural Global Enrolment Survey in November 2024, institutions asked for a survey for the January to March intake. NAFSA, Oxford Test of English and the Studyportals Analytics and Consulting Team have come together again to deliver a survey that helps universities respond to unpredictable and rapid changes.

Unlike traditional data sources, which often lag behind by months or years, this report offers **near real-time data** gathered from institutions worldwide. It allows universities to quickly adapt to changes in student demand, emerging markets, and policy shifts, well before official national figures are available. The survey results also offer a side-by-side comparison of global student flows across different parts of the world.

Groupings

This survey aims to provide a global benchmark for enrolment trends, where we break down insights into relevant regions. Where there have been sufficient responses, there are insights at a country level.

240 institutions from 48 countries completed the Global Enrolment Benchmark survey for this intake, sharing their insights into their international student enrolments, the obstacles faced by students to enrol, and what they anticipate over the next 12 months.

The countries and regions covered in this benchmark report are Asian countries (17 responses from 11 countries), Australia (14 responses), Canada (15 responses), European countries (65 responses from 20 countries), the UK (21 responses), US (92 responses) and Other (16 responses from 13 countries). A breakdown of responses per country is provided in the Methodology section of this report.

When interpreting responses from different parts of the world, kindly note the relative sample size. Also note that any mention of "institutions" refers to the institutions surveyed for this report rather than all institutions in a certain region.

Key findings

- At **the Master's/Postgraduate** level, where most international students are enrolled, **34% of institutions report a decline** compared to last year's intake. 29% report higher enrolments and 27% say enrolments stayed the same. The sharpest declines are seen in Canada, Australia, and the US, while **the UK has seen a strong rebound in Postgraduate enrolments.**
- International **Bachelor's/Undergraduate** trends indicate a **34% increase in reported enrolments,** with 26% of institutions **reporting a decline** and 40% reporting that enrolments stayed the same. Undergraduate enrolments are a third lower in Canada, but flat or higher in other parts of the world. **Undergraduate enrolments in Australia were 9% higher.**
- **62% of institutions surveyed find restrictive government policies and/or problems obtaining a visa a significant issue** for students to overcome to enrol. This includes 93% of universities surveyed in Canada, 86% of universities in Australia, and 70% of those in the US. Only 6% of responding institutions in Asian countries feel that this issue is significant.
- Universities across the globe mentioned visa costs and delays, migration limitations and policy uncertainty as major obstacles. They also spoke to the lack of consultation, and the disruptive manner in which government policies were rolled out.
- 67% of Canadian institutions think **budget cuts** are very likely over the next 12 months (compared to 38% of institutions globally). 64% of institutions in Australia and 57% of institutions in the UK think budget cuts are very likely in the coming year.17% of all institutions expect **large changes to subjects/programmes** in the next 12 months. 48% of UK institutions and 33% of Canadian institutions have the highest proportion of institutions that anticipate large changes to subjects/programmes .
- 15% of all responding institutions and 35% of institutions in Asian countries indicate that **meeting academic admissions requirements** is a significant issue. Consistent with the findings of the 2024 survey, 11% of institutions **find meeting English proficiency requirements** to be a significant issue.
- **Diversification** into new markets remains the most universally anticipated strategy among the institutions.

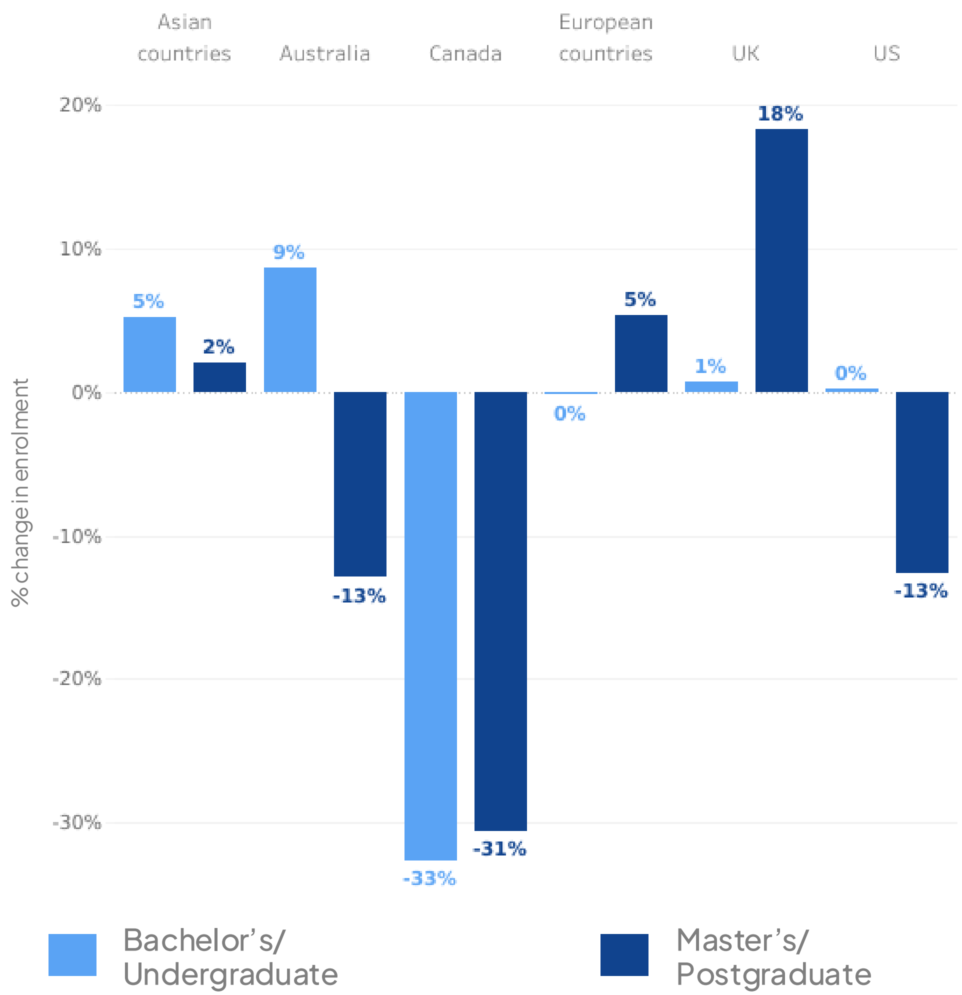
How enrolment has evolved since last year

Regional insights

Looking at global enrolment trends, we see a mix of growth and challenges across regions.

- Undergraduate enrolments in Asian countries were up 5%, while those in Australia were 9% higher.
- Undergraduate enrolments were essentially flat in European countries, the UK and the US and a third lower in Canada.
- Postgraduate enrolments were 18% higher in the UK, rebounding from a sharp enrolment drop in January 2024 after new legislation on dependents' visas was introduced. Postgraduate enrolment was also higher in European and Asian countries.
- The sharpest drops in Postgraduate enrolment were in Canada (down 31%), followed by the US and Australia (both 13% lower)

Changes in international enrolments



Trends shaping international higher education

Geopolitical and policy impacts on student demand

Shifting trends in global student mobility

- While student decision-making takes place over a period of about 18 months, the influence of the shifting geopolitical and policy landscape can quickly affect enrolments. The national and international context of each enrolment period has a profound impact. 62% of institutions surveyed said restrictive government policies and/or issues obtaining visas were a significant issue.

- In some cases, we can observe clear shifts in student mobility where challenges in one market result in market share gains in other destinations. In other cases, students who would otherwise study internationally are not able to do so.

How Studyportals data tracks these trends

- Studyportals data is unique in that it is largely organically generated and based on the platforms which collectively list over 90% of all English-taught Bachelor's and Master's programmes worldwide. This has led to a diverse global visitor base of over 51 million users searching for study opportunities. This allows the measurement of student interest by programme pageviews, tracking shifts over time, and the provision of additional context to the survey results.

How external factors are shaping student interest trends in the Big Four (US, UK, Canada, and Australia)

- In the US: Recent and rapid changes in political discourse and policy under President Trump's administration - including funding threats and shifts in diversity and free speech regulations, are impacting enrolments. A sharp drop in student interest for programmes in the US on Studyportals, that began last year, has translated into a drop in Postgraduate enrolments for this intake. Since the 5th of January, absolute student interest for studying a Master's degree on Studyportals has dropped by 54%, with the US losing 36% of it's market share of total student interest.

- In the UK: Regulations affecting dependent visas negatively affected postgraduate enrolments in January 2024, and while that policy will continue to negatively weigh on enrolments, we are seeing a recovery there, relative to that intake. Relative interest in the UK has risen 12% since May last year when the UK confirmed the Graduate Route would stay in place for international students. Student interest for the UK has increased in tandem with a decrease in interest for destinations like the US.

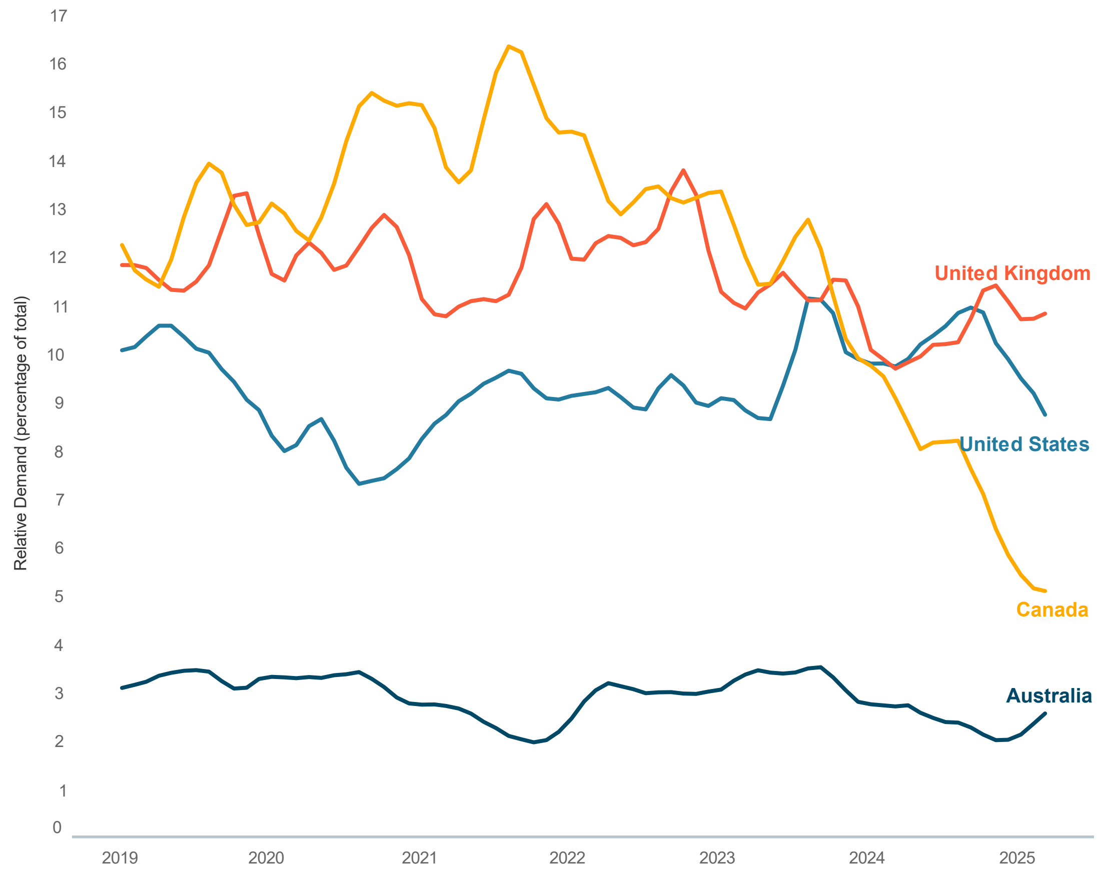
Geopolitical and policy impacts on student demand

How external factors are shaping student interest trends in the Big Four (US, UK, Canada, and Australia)

- In Canada: Institutions in Canada continue to struggle with government restrictions and student caps. Relative interest for Bachelor's and Master's degrees has dropped 54% from the announcement to changes in Canada's International Student Program in October 2023. As with November's survey, 93% of Canadian institutions said restrictive government polices and/or issues obtaining visas were a significant issue. Enrolments for both Undergraduate and Postgraduate intakes were sharply lower, down by almost a third, respectively.
- In Australia: Australia's market share of global student interest is 8% higher since January, potentially influenced by the drops in student interest for competitors.

Relative global student interest

Six month rolling average for Bachelor's and Master's programmes on Studyportals



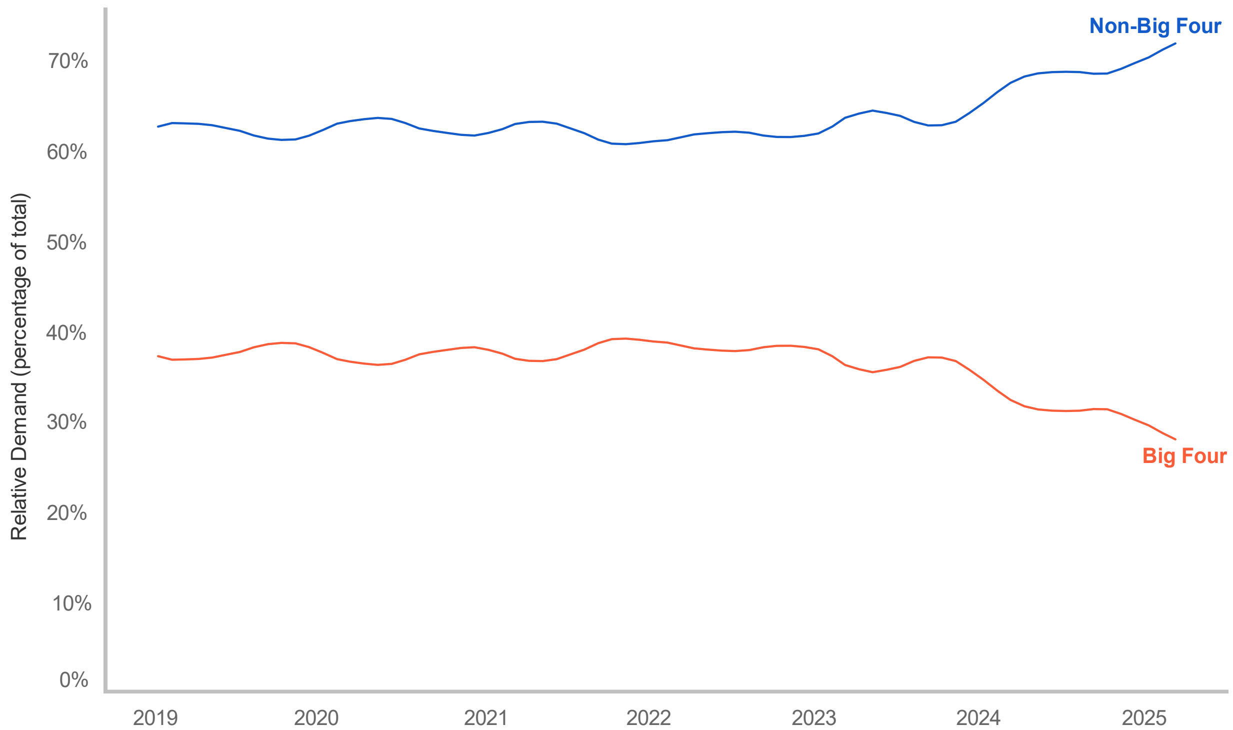
Non-Big Four destinations gaining market share

As the big Anglophone destinations lose market share, 'non-traditional' destinations, like those in Asia and Europe, are becoming more interesting to students.

These destinations are increasingly seen as offering strong academic value, more accessible immigration pathways, and lower tuition fees, making them competitive alternatives to the US, UK, Canada, and Australia.

Change in relative demand for the Big Four & Non-Big Four study destinations

(On-campus Bachelor & Master programmes, 2019-2025)



Non-Big Four destinations gaining market share

Leading countries

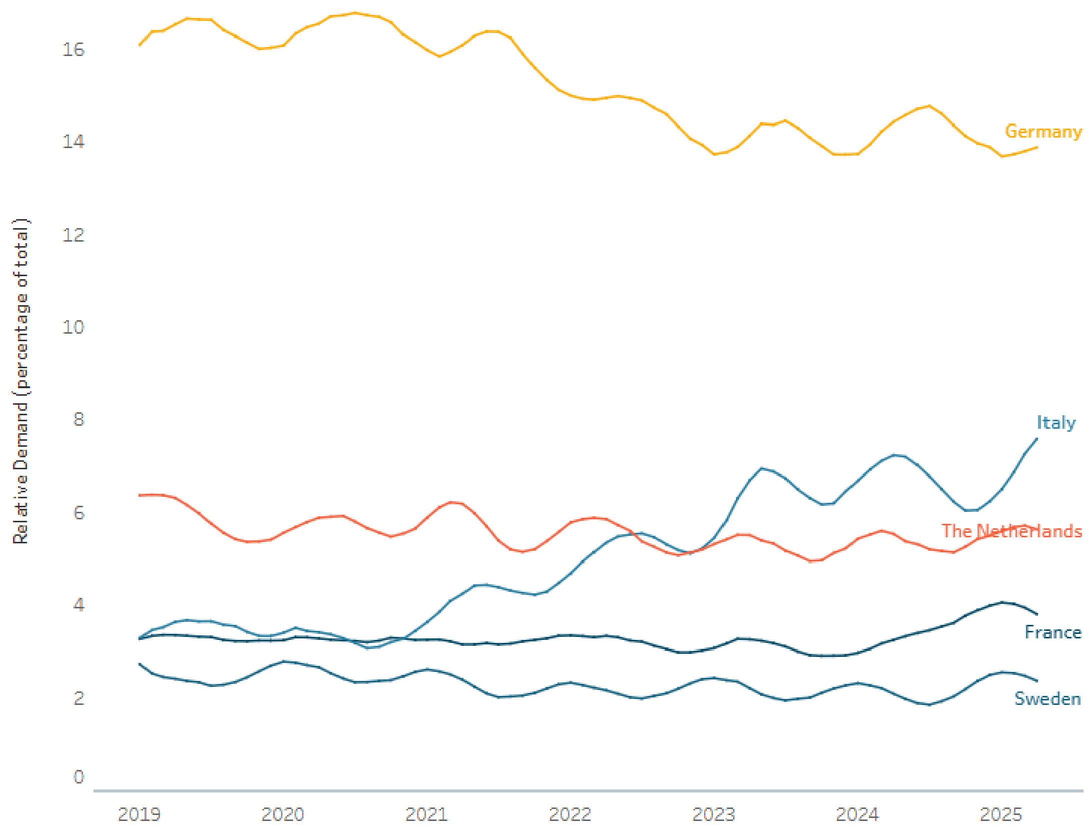
Outside of the Big Four, European countries like Germany, Italy, and The Netherlands, France and Sweden attract the most student interest.

Relative interest in France, Austria, Ireland and Spain has surged between 20 and 30% over the past year.

Malaysia, Japan, China, and South Korea are gaining market share of student interest, as is the United Arab Emirates and South Africa.

Change in relative demand for the top destinations outside the Big Four

(On-campus Bachelor & Master programmes, 2019-2025)



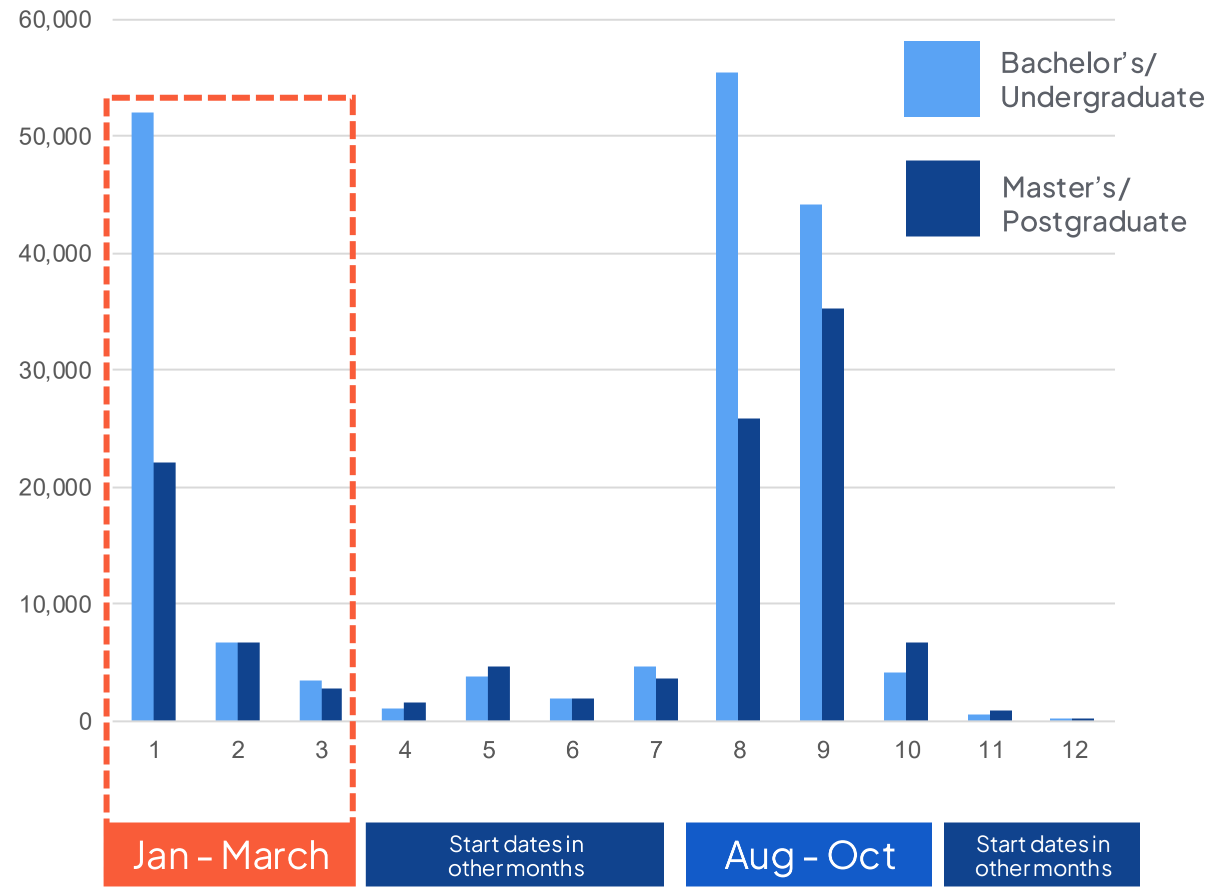
The January to March intake in perspective

This graph shows the global distribution of programme start dates by month. There are however large regional variations in the distribution of programme start dates.

Traditionally, the January to March intake has been the largest for countries in the Southern hemisphere, like Australia, New Zealand and South Africa.

In recent years, more and more institutions in the Northern hemisphere have added this as a second main intake .

Programme start dates by month



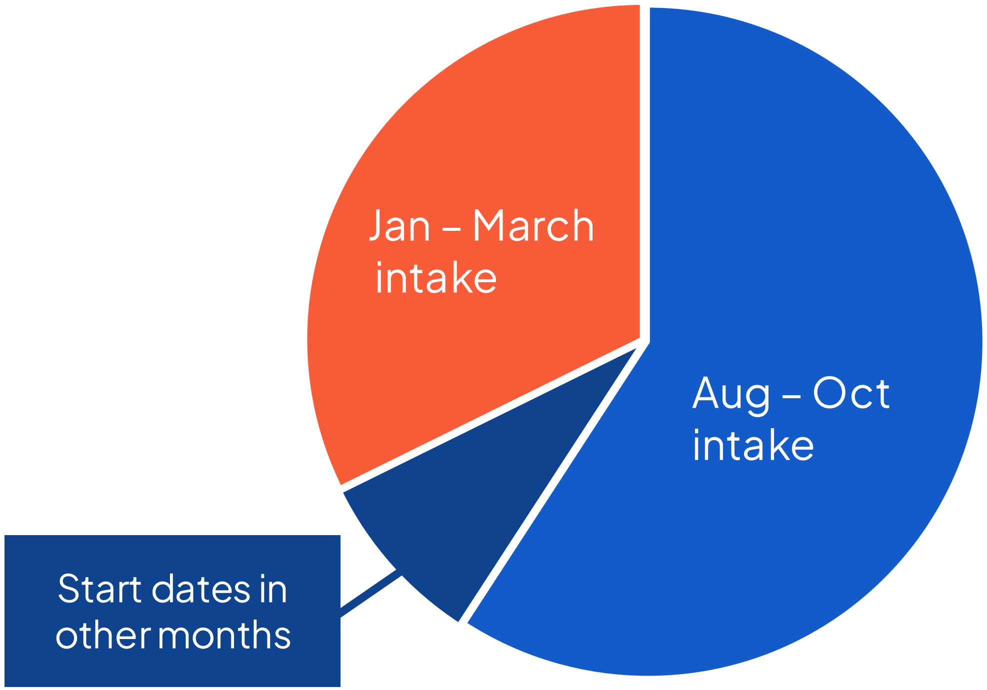
Student interest for the January to March intake

32% of global Bachelor's and Master's programmes start between January and March. This compares to 59% of programmes with a start date between August and October.

Student interest data (based on pageviews on Studyportals platforms) shows that prospective students from certain countries are more likely to have a stronger preference for the January to March intake than their peers in other countries.

Over a quarter of student interest for Bachelor's and Master's on Studyportals, from prospective students in South Africa, Nepal, New Zealand, Australia, and Malaysia goes towards programmes with a January to March start date.

Supply of global on-campus Bachelor's and Master's programmes by intake



Undergraduate and Postgraduate enrolment trends

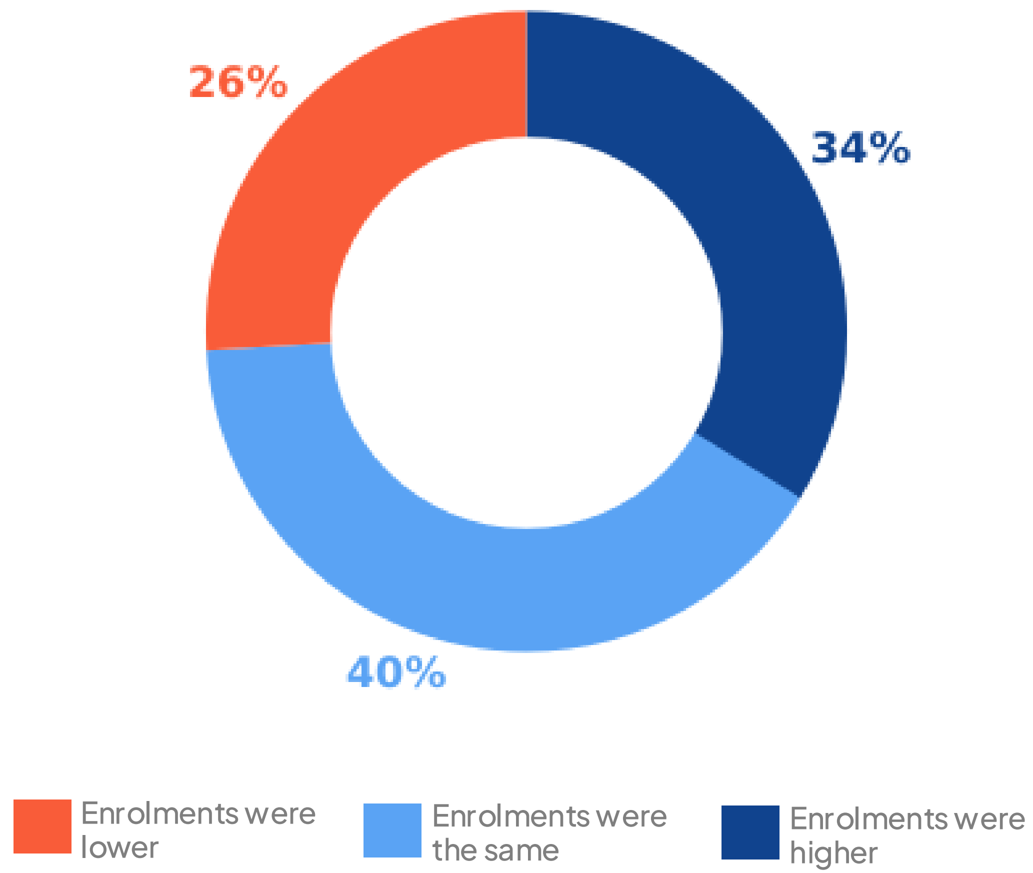
Undergraduate enrolment trends

Global snapshot

When we look at Bachelor's programmes, the experiences of institutions are quite varied.

- Roughly a third (34%) of surveyed institutions see more international students arrive compared to the same intake last year.
- 40% of institutions say numbers stayed the same.
- 26% of surveyed institutions have welcomed fewer international Undergraduates.

Changes in international Undergraduate enrolments

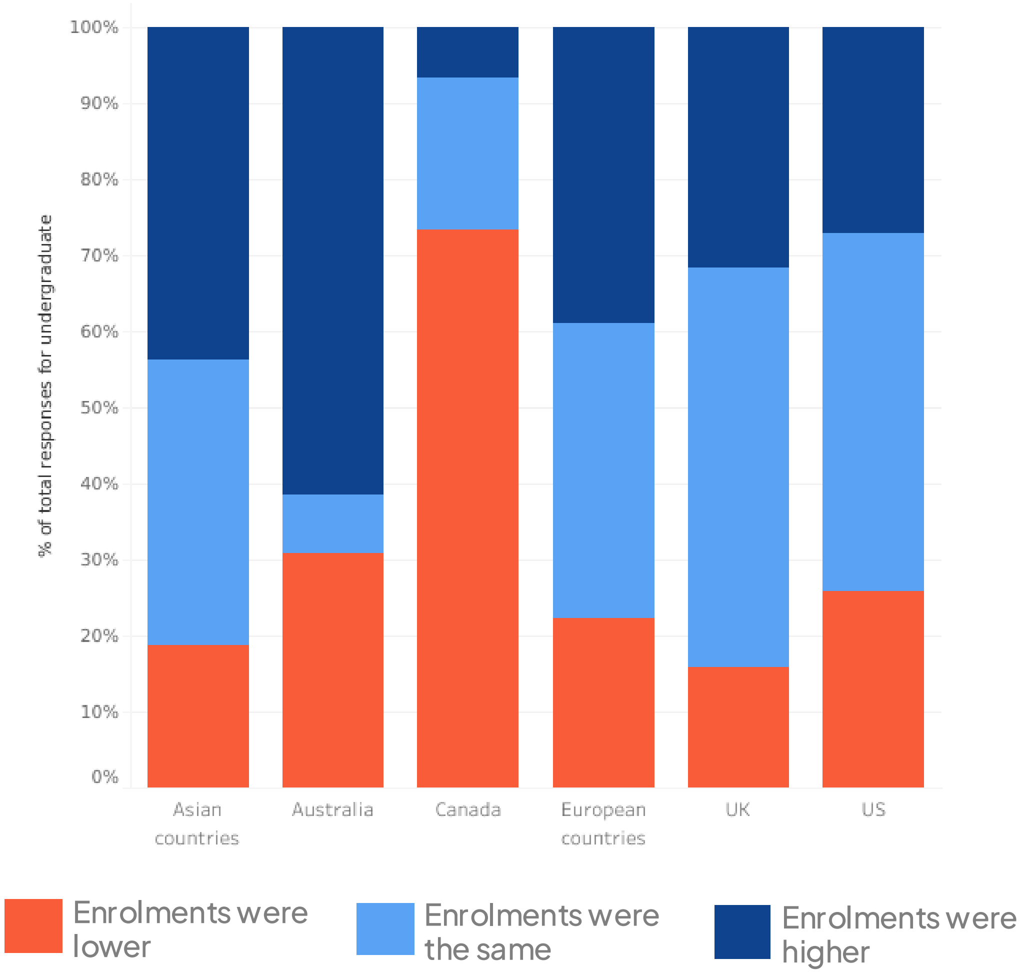


Undergraduate enrolment trends

Regional overview

- Canada is facing the steepest decline, as 73% of institutions reported a drop in undergraduate enrolments – far more than any other region.
- Australia, on the other hand, is seeing strong growth. Over 60% of institutions surveyed said enrolments were up.
- In European countries and Asian countries, the picture is generally encouraging. Growth outpaced decline, and a good number of institutions are holding steady.
- The UK appears to be in a stable spot – most institutions reported little to no change, and only a small percentage saw a drop.
- The US is more evenly split. Some saw gains, some saw declines, but nearly half reported no change at all Bachelor's level.

Changes in international Undergraduate enrolments



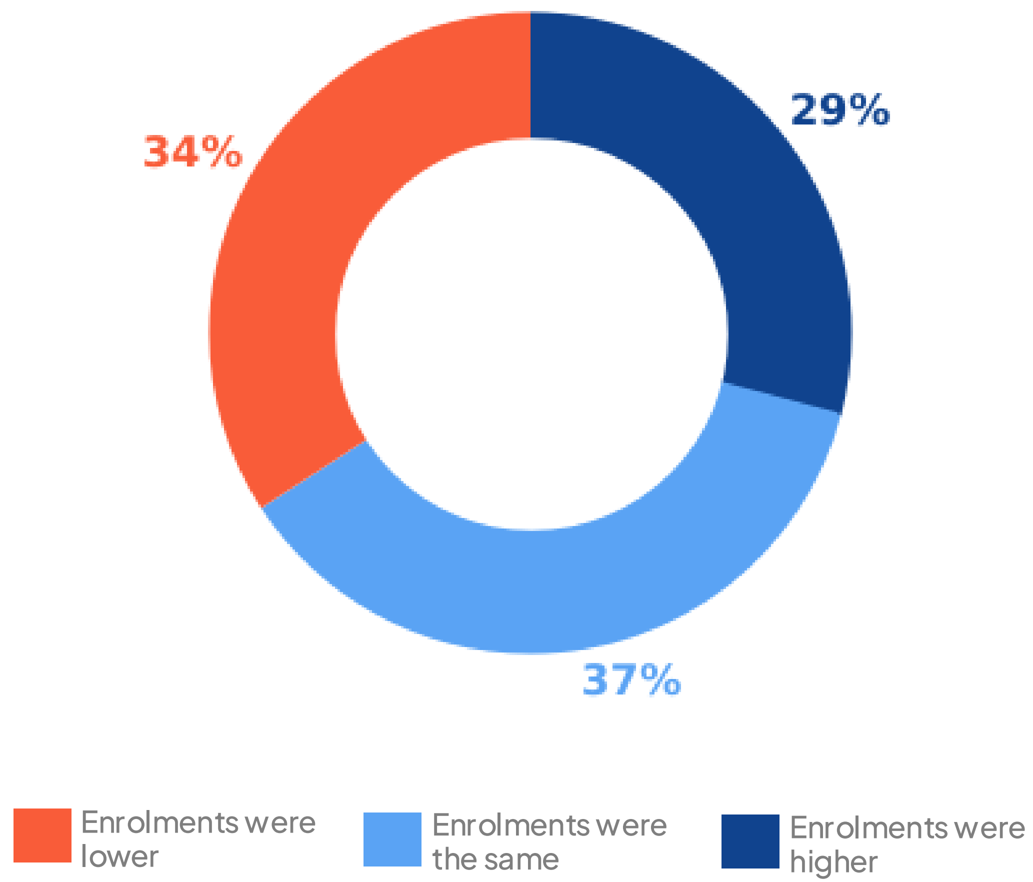
Postgraduate enrolment trends

Global snapshot

Similarly to undergraduate enrolment, the global picture for postgraduate enrolment is mixed.

- Just over a third of institutions (around 37%) reported that enrolment numbers have stayed about the same, possibly due to huge variation across regions.
- At the same time, slightly more institutions saw a drop (34%) than an increase (29%), suggesting a modest overall decline – but not a dramatic one.

Changes in international Postgraduate enrolments



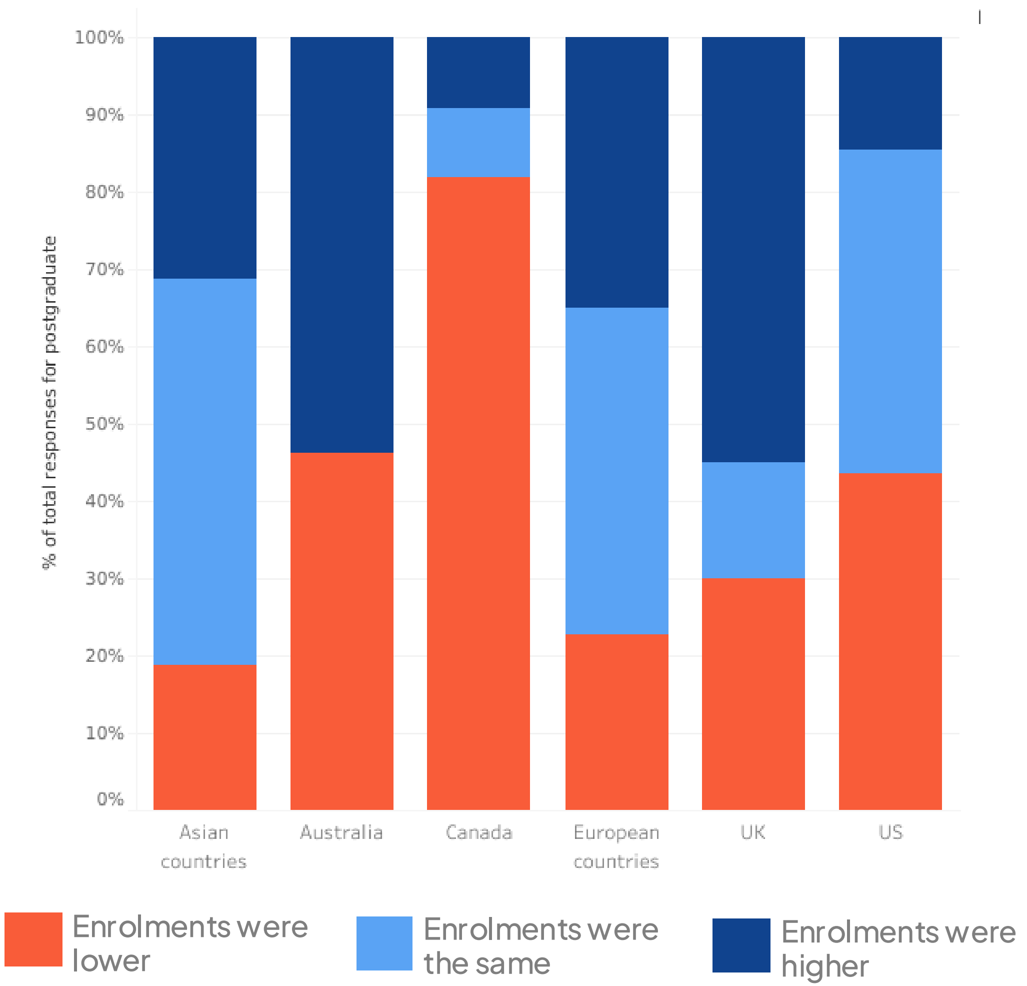
Postgraduate enrolment trends

Regional overview

- Canada stands out with a huge drop in postgraduate enrolments, with 82% of institutions surveyed reporting lower numbers.
- In Australia 54% of institutions reported increases.
- In the UK, 55% of institutions saw enrolments rise, while 35% of institutions surveyed in European countries saw an increase.
- The US is more mixed - 43% reported a decline, with 42% seeing no change, suggesting a more uncertain landscape.
- Asia is relatively balanced, with 31% reporting growth and most institutions surveyed seeing stable enrolments.

While undergraduate enrolments also face challenges, postgraduate trends are more volatile, especially since most international students are in postgraduate programmes.

Changes in international Postgraduate enrolments



Obstacles faced

Obstacles faced by institutions

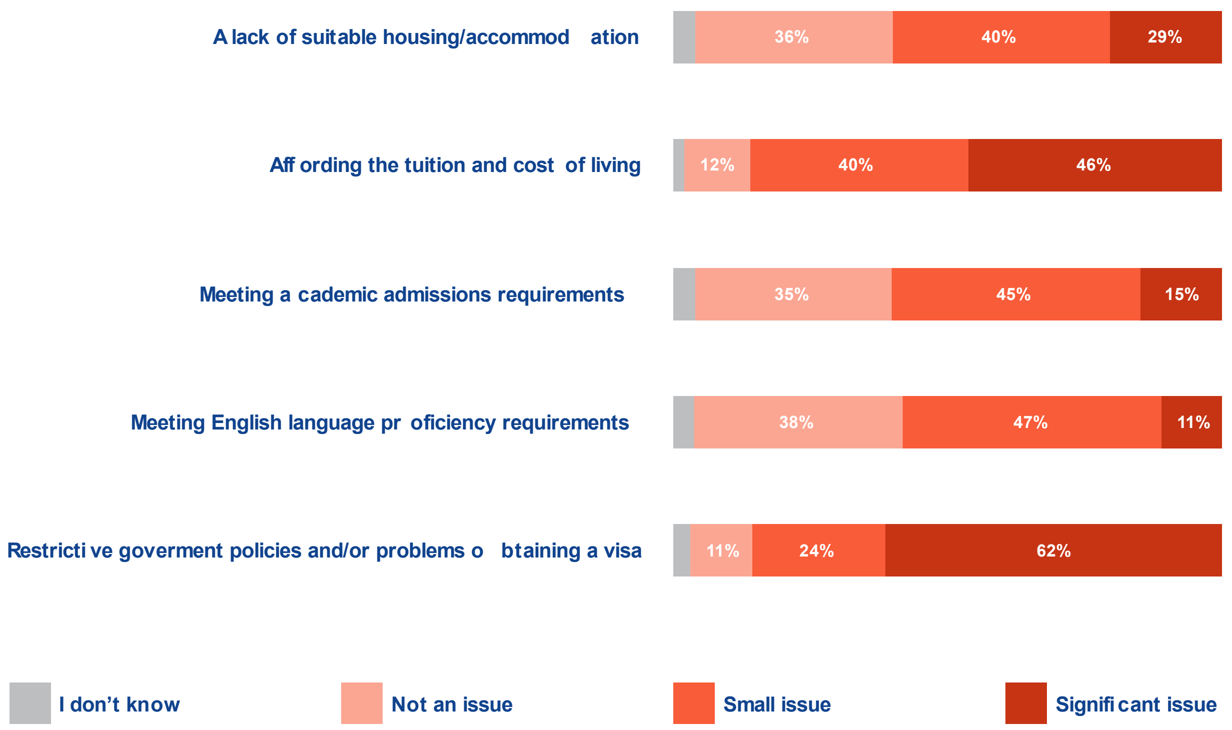
Institutions were asked to what extent these obstacles are an issue for students to overcome in order to enrol at their university:

- A lack of suitable housing/accommodation
- Affording the tuition and cost of living
- Meeting academic admissions requirements
- Meeting English language proficiency requirements
- Restrictive government policies and/or problems obtaining a visa

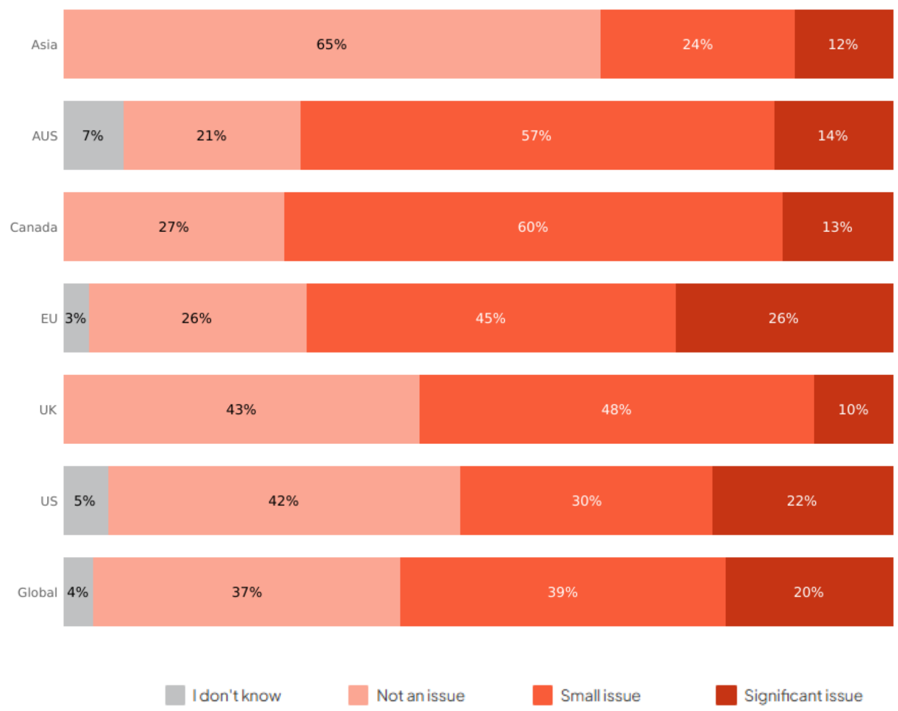
Key obstacles to student enrolment

- **Lack of suitable housing/accommodation** is listed as a significant issue by 20% of surveyed institutions globally, with more institutions in European countries seeing this obstacle as significant.
- **Affording tuition and the cost of living** is seen by just under half of institutions as a significant issue. This issue is significant for the highest proportion of institutions in the UK (57%).
- **Meeting academic admissions requirements** is viewed as a significant issue by 15% of all responding institutions and 35% of institutions in Asian countries.
- **Meeting English proficiency requirements** is listed as a significant issue by 11% of institutions, consistent with the findings of the 2024 survey.
- **Restrictive government policies and/or problems obtaining a visa** is viewed by 62% of institutions as a significant issue, including 93% of universities surveyed in Canada, 86% of universities in Australia and 70% of those in the US. Only 6% of institutions in Asian countries felt that this issue is significant.

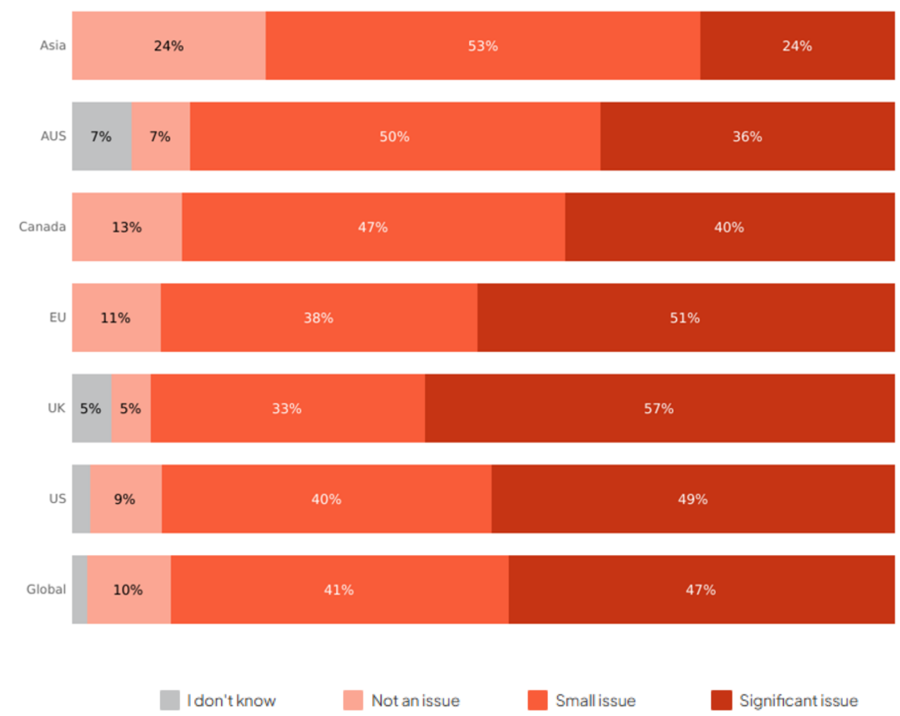
We asked institutions, 'To what extent are these obstacles an issue for students to overcome in order to enrol at your university?'



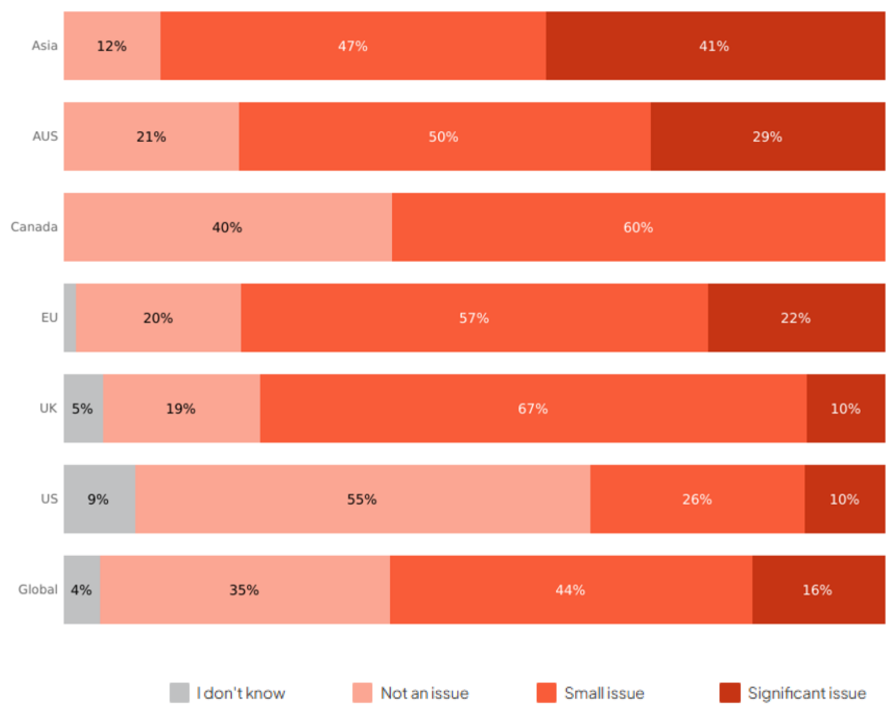
A lack of suitable housing/accommodation



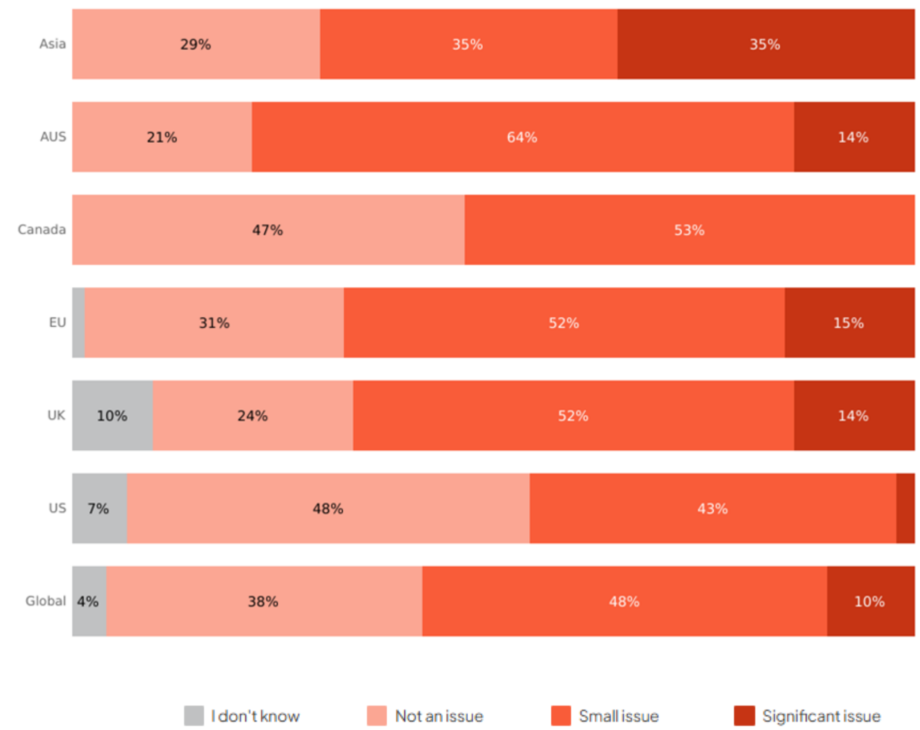
Affording the tuition and cost of living



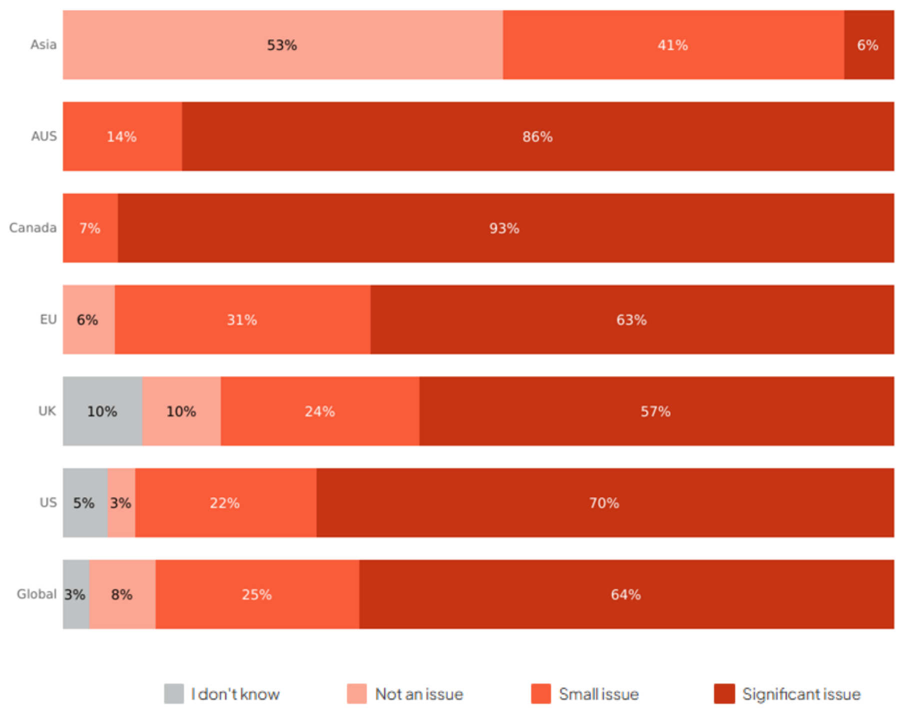
Meeting academic admissions requirements



Meeting English proficiency requirements



Restrictive government policies and/or problems obtaining a visa



Plans for the next 12 months

Key developments expected

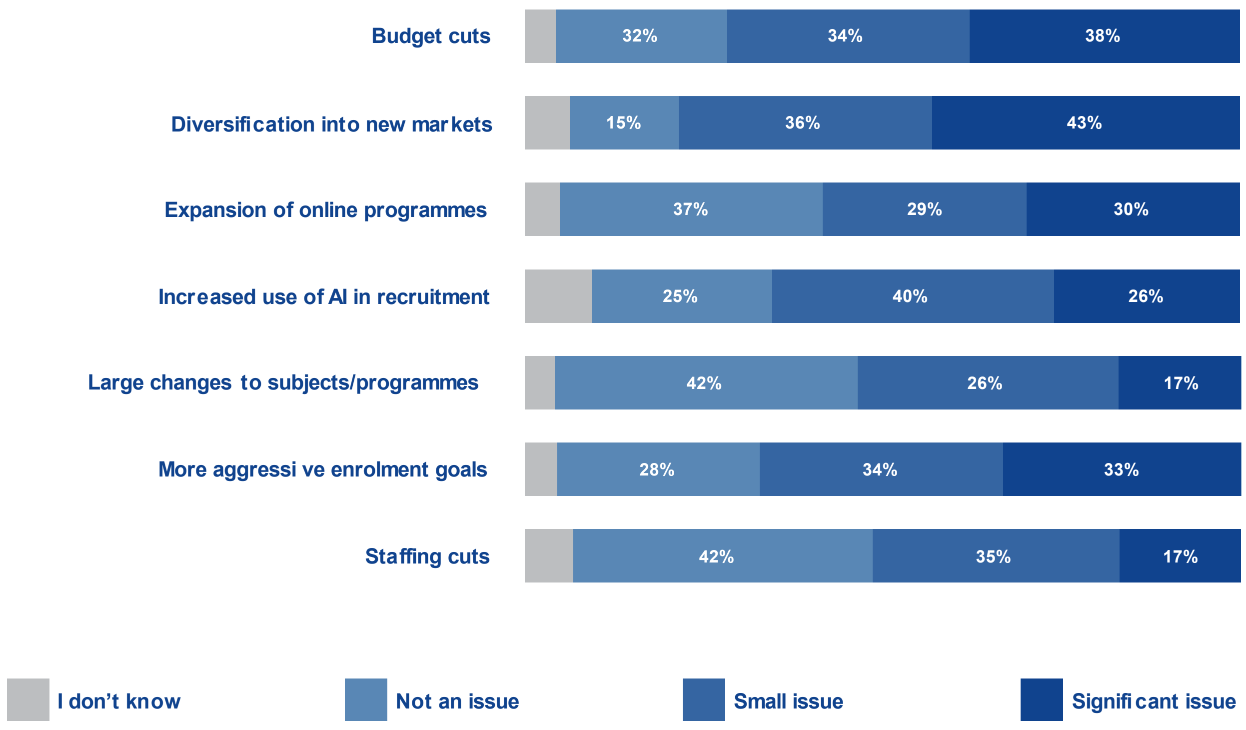
Institutions were asked which of the following they are anticipating over the next 12 months:

- Budget cuts
- Diversification into new markets
- Expansion of online programmes
- Increased use of Artificial intelligence in recruitment and enrolment management
- Large changes to subjects/programmes
- More aggressive recruitment goals
- Staffing cuts

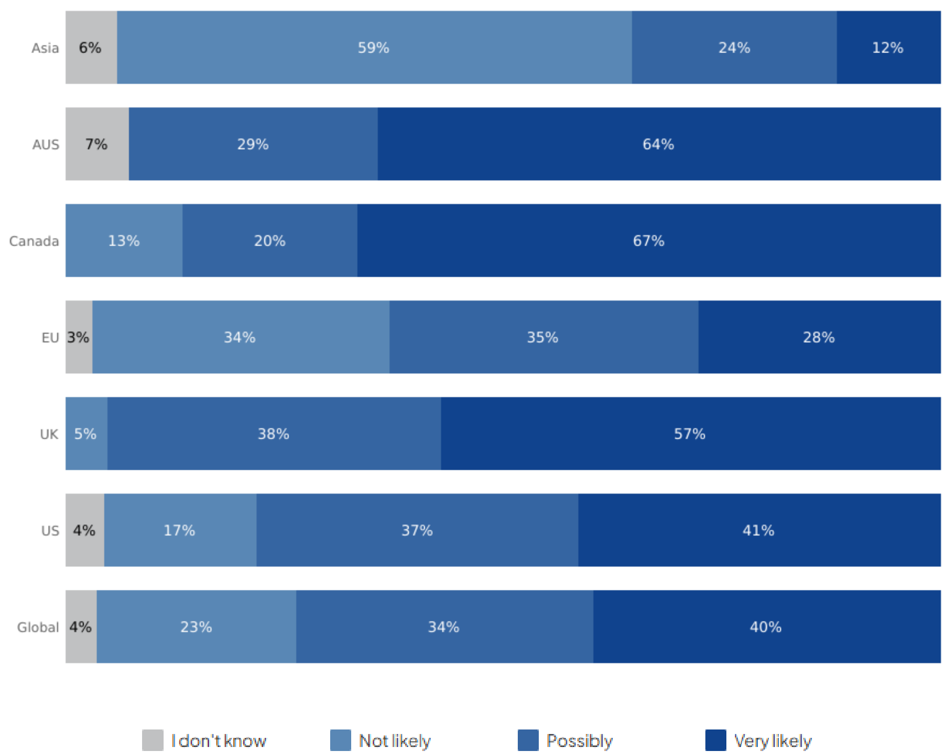
Institutions' outlook for the next 12 months

- **Budget cuts** are thought to be very likely over the next 12 months by 67% of the surveyed Canadian institutions (compared to 38% of institutions globally).This includes 64% of surveyed institutions in Australia and 57% of those the UK.
- **Diversification** into new markets remains the most universally anticipated strategy among the institutions that were surveyed.
- **Expanding online programmes** is listed by 30% of institutions as very likely in the next 12 months. For Australia, this was only 7% of universities.
- **The increased use of artificial intelligence** over the next year, namely in recruitment and enrolment, is expected by over a quarter of institutions.
- **Large changes to subjects/programmes** are anticipated by 17% of all institutions in next 12 months, including 48% of UK institutions and 33% of Canadian institutions.
- **More aggressive enrolment goals** are seen by a third of institutions as very likely over the next 12 months, despite the higher expectation of more budget and staffing cuts.
- **Staffing cuts** are expected by 17% of institutions within the next 12 months. Australia, the UK, and Canada are bracing for tougher times, with many viewing staff reductions as very likely.

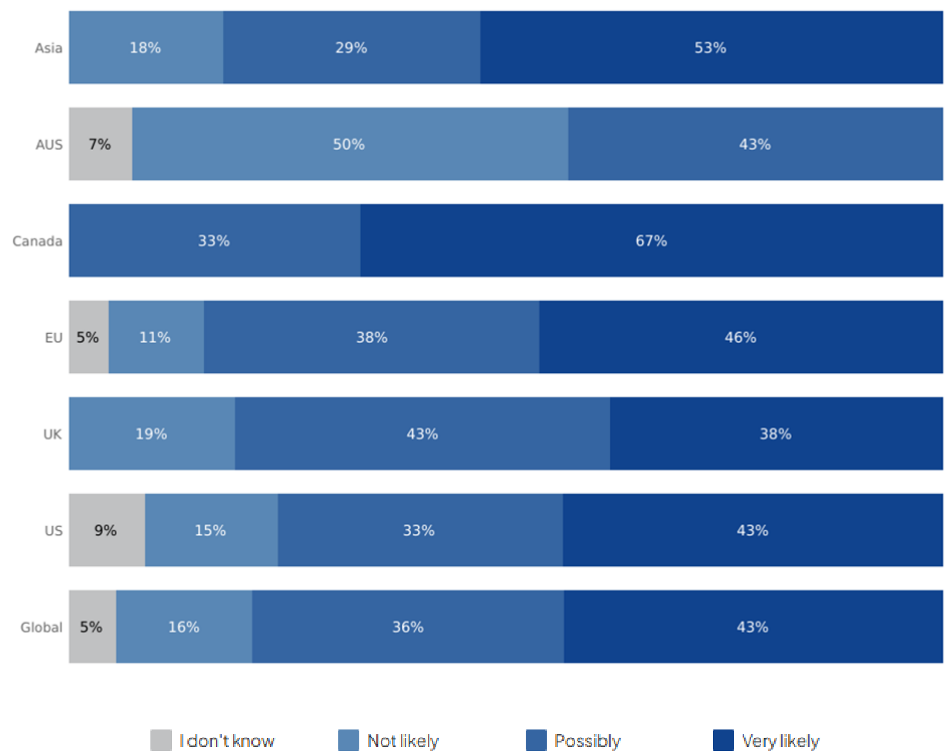
We asked institutions, "Which of the following are you anticipating over the next 12 months?"



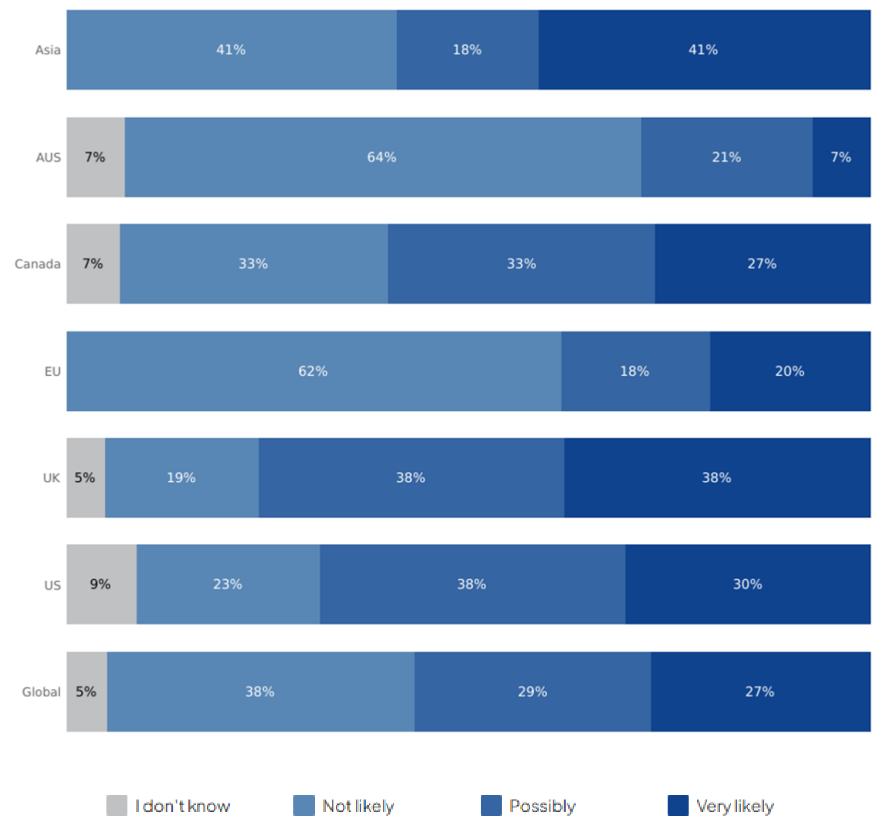
Budget cuts



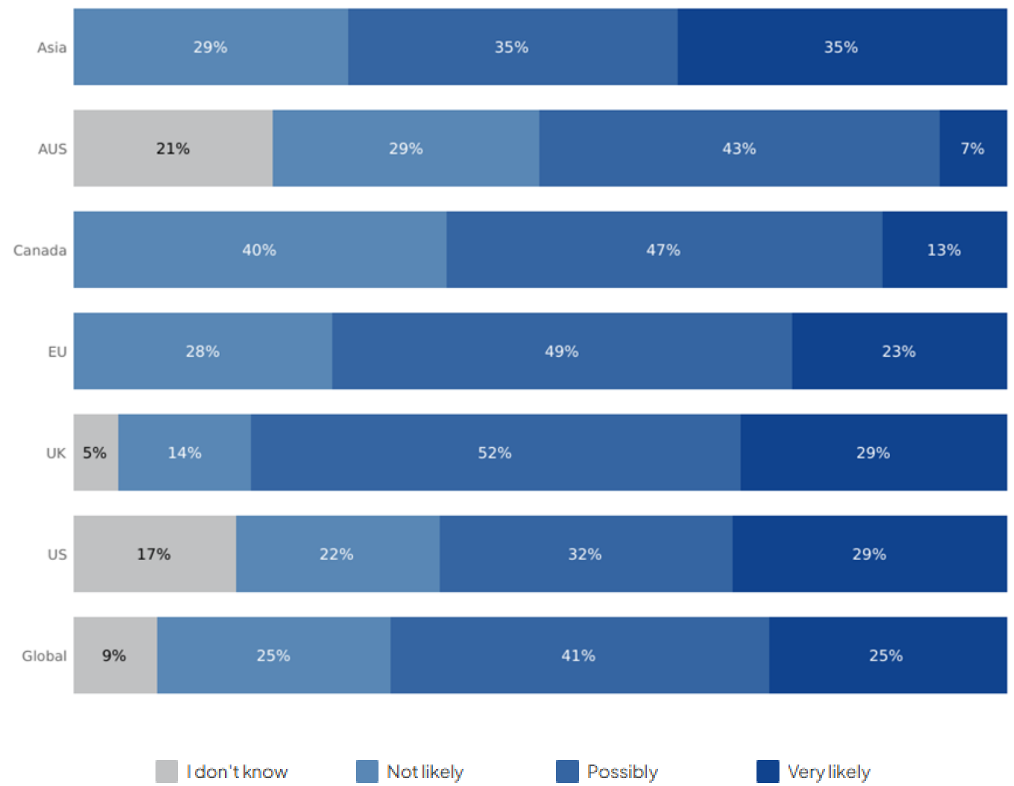
Diversification into new markets



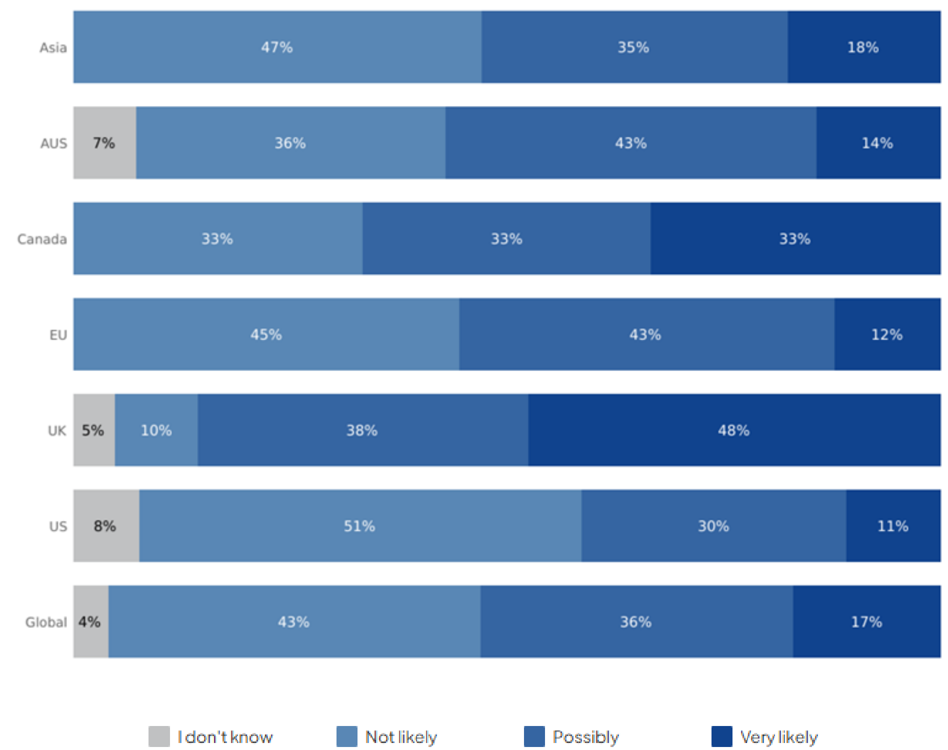
Expansion of online programmes



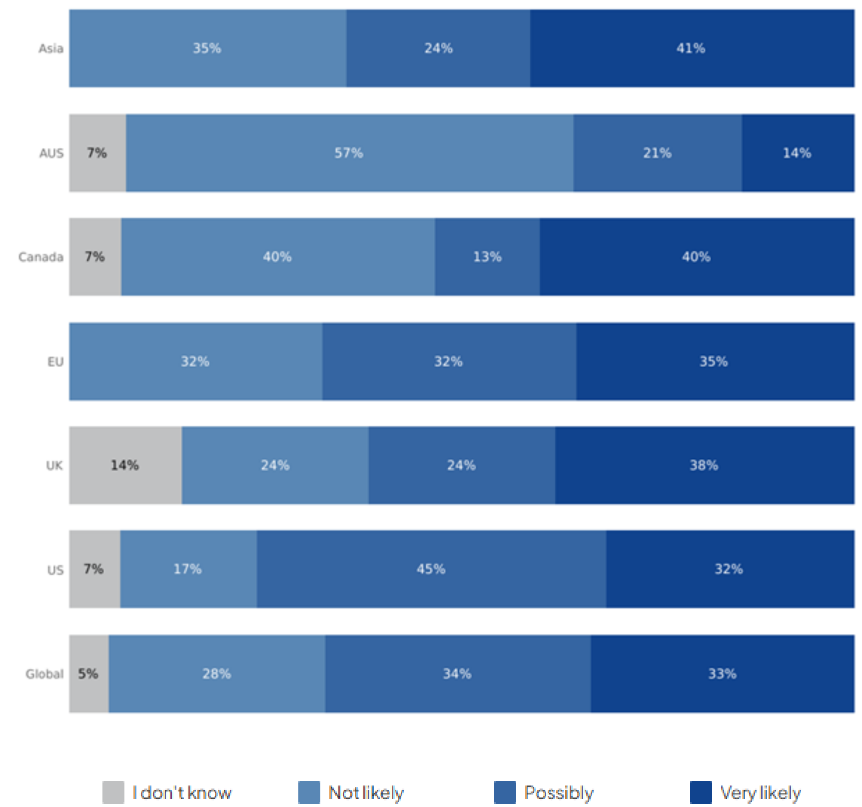
Increased use of Artificial intelligence in recruitment and enrolment management



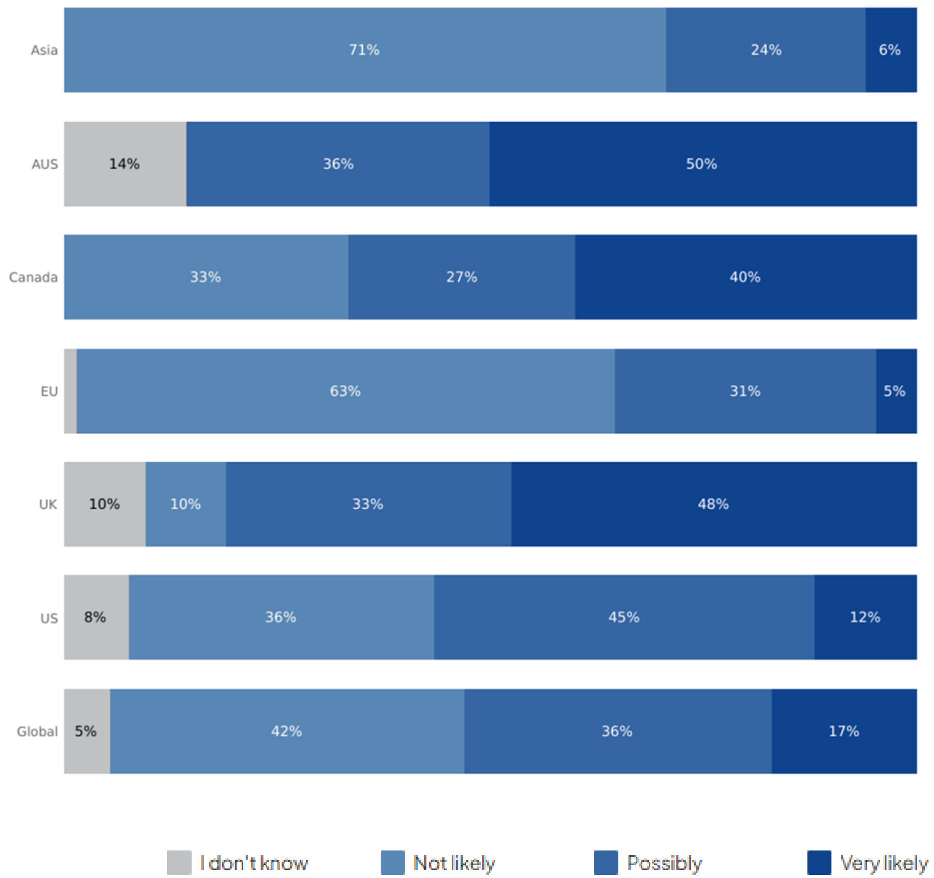
Large changes to subjects/programmes



More aggressive enrolment goals



Staffing cuts



Conclusion

Conclusion

These survey findings shed light on the tangible impact of shifting government policies, particularly in major destinations like Canada, the US, the UK and Australia.

With traditional government data sources facing potential gaps, including disruptions in data collection and reporting in the US, peer-sourced data in international higher education is more important than ever.

As global mobility patterns shift and competition intensifies, peer-sourced data offers immediate, real-world perspectives on enrolment trends, student behavior, and institutional strategies. In an increasingly volatile landscape, access to current, comparative benchmarks empowers universities to adapt, innovate, and make informed decisions faster

Importantly, the data also serves a wider purpose. It empowers institutions to engage policymakers with concrete evidence of the consequences of restrictive policies on international education. With a unified, data-driven voice, the sector is better positioned to advocate for supportive, forward-looking policy environments that sustain global student mobility.

Methodology

Survey methodology and data integrity

Survey methodology and response rates

The Global Enrolment Benchmark survey ran from 24 March to 11 April 2025, with responses captured through an online survey.

The response rate varied significantly across regions, potentially introducing geographic bias and limiting generalisability in less-represented areas. Although efforts were made to ensure a representative sample, the final number of respondents may not fully capture the diversity of the entire higher education landscape. Additionally, due to the self-reported nature of the survey data, response bias may affect the accuracy of certain findings.

Where there have been sufficient responses, there are insights at a country level. The countries and regions covered in this benchmark report are Asian countries (17 responses from 11 countries), Australia (14 responses), Canada (15 responses), European countries (65 responses from 20 countries), the UK (21 responses), US (92 responses), Other (16 responses from 13 countries). The breakdown of responses per country can be found on the next pages. Please note the relative sample size when interpreting responses from different parts of the world. Numbers have been rounded to the nearest whole number.

Data integrity

To maintain data quality and integrity, checks were conducted for consistency and potential duplications, with any duplicates removed to avoid data inflation. Response patterns were also analysed to identify outliers, and responses that appeared inconsistent or showed patterns of straight-lining were flagged for further review or exclusion. All data were anonymised and insights presented solely at an aggregate level to protect respondent confidentiality.

It is advised to follow best practices and consult multiple data sources for decision-making.

Student interest data methodology

Key terms used in the report

‘Supply’: volume of programmes available on our websites.

'Student interest/demand': Measured by pageviews. This is defined as a visit to a programme overview and allows us to assume that the user may be interested in the study. The pageview dataset includes views from both registered and unregistered users.

‘Absolute demand’: volume of pageviews towards a destination, subject area, or programme.

‘Relative demand’: the percentage of total pageviews in relation to a study destinations, origin countries, or subdisciplines. This is a good measure of market share.

About Studyportals data

Studyportals data is unique in that it is largely **organically generated** and based on the platforms which collectively **listing over 90% of all English-taught Bachelor’s and Master’s programmes** worldwide. This has led to a diverse global visitor base of **over 51 million users** searching for study opportunities.

To keep the database up to date, our more than **40-person strong data team** maintains an elaborate updating schedule, proactively monitoring and gathering information from university websites. It is our aim to update each programme **at least once a year**, with more regular updates of key information, such as tuition fees. A data quality score of **96.90/100** was calculated as of **November 2024**, considering indicators like **data completeness** and **update frequency**.

Countries of respondents and groupings (1/2)

Asian countries

Country	Number of Respondents
Brunei	1
China	1
India	2
Japan	4
Malaysia	1
New Zealand	2
Republic of Korea	1
Saudi Arabia	1
Singapore	1
Thailand	1
Vietnam	2
Total	**17**

Australia

Country	Number of Respondents
Australia	14

Canada

Country	Number of Respondents
Canada	15

Countries of respondents and groupings (2/2)

European countries

Country	Number of Respondents	Country	Number of Respondents
Austria	3	Ireland	2
Belgium	2	Italy	7
Cyprus	2	Lithuania	1
Czech Republic	4	Netherlands	6
Denmark	2	Poland	4
Finland	6	Romania	1
France	3	Spain	11
Germany	4	Switzerland	1
Greece	2	Türkiye	1
Hungary	2	Ukraine	1
		Total	**65**

UK

Country	Number of Respondents
United Kingdom	21

US

Country	Number of Respondents
United States	92

Other

Country	Number of Respondents
Argentina	1
Azerbaijan	1
Brazil	1
Chile	2
Colombia	1
Dominican Republic	1
Kenya	1
Mexico	1
Nigeria	1
Puerto Rico	1
South Africa	2
United Arab Emirates	2
Zimbabwe	1
Total	**16**

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Cara is a communications specialist with a strong background in journalism and a passion for storytelling that drives impact. She plays a pivotal role in shaping Studyportals' thought leadership initiatives. In collaboration with subject matter experts, she identifies emerging trends to develop high-impact intelligence reports. Cara has a Bachelor of Journalism from Rhodes University in South Africa. She has an MBA from the University of Oxford, where she was a Chevening scholar, where she co-chaired the Media and Marketing Oxford Business Network.

About Studyportals

Studyportals is the world's most comprehensive study choice platform, helping students choose their best-fit study programme across 245,000+ English-taught programmes from 3,500+ institutions.

Over 51 million students use Studyportals platforms annually to find and compare their study options across borders and select the right programme. Our goal is to make education choice transparent, globally and ensure a future where no student will miss out on an education opportunity because of a lack of information.

At the same time Studyportals helps universities reach a global audience and diversify their student population.

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