Aug-Oct 2025 Intake

The Global Enrolment Benchmark Survey

Global Summary Report

Table of Contents

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 50 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

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.

About Universities UK International

Universities UK International (UUKi) represents UK higher education institutions (HEIs) globally and helps them flourish internationally. To do this we actively promote UK HEIs abroad, provide trusted information for and about them, and create new opportunities through our unique ability to act at sector level. We draw on UK university expertise to influence policy in the UK and overseas, delivering information, advice and guidance to facilitate mutually beneficial collaboration between UK HEIs and a broad range of international partners.

Reader's Guide

Important Notes

✓ Response rates varied across regions

Please note the relative sample size when interpreting responses from different parts of the world.

✓ Self-reported data

Universities reported their own trends, which introduced bias to the data. To maintain data quality and integrity, checks were conducted for consistency and duplication.

✓ Percentages are averages

When we say '40% of universities,' this is the average across all universities surveyed that answered that question.

This report offers you a timely, comparable snapshot of global and regional trends. However, you should use this report alongside other data sources when making decisions. Trends are more reliable than single data points.

Understanding the data

- The survey covers: new international students in the August to October 2025 intake.
- Comparisons: Changes in enrolment are compared to the same intake last year.
- 461 universities from 63 countries responded to this survey.
- Region and country breakdowns are determined by the number of responses.
- Participating institutions included 20 from Canada, 201 from the United States, 39 from the United Kingdom, 133 from Europe, 26 from Asia, and others from additional regions.

You can read the full methodology at the end of this report.

Part One

Context and key findings

How international enrolments shifted in 2025

Context: Why this survey matters

How enrolment patterns have intensified since 2024

When we published the first Global Enrolment Benchmark Survey in 2024, it captured a market in transition. Institutions were reporting policy barriers as a serious obstacle. Student demand was shifting. Universities were beginning to rethink their recruitment strategies.

This survey, conducted a year later for the same intake period, tells you what actually happened next. The patterns we observed have continued and intensified.

Policy barriers and visa restrictions remain the dominant obstacle institutions face. In some regions, the pressure has only increased. The United States and Canada are both feeling sharper impacts than they did a year ago.

At the same time, the shifts in student demand we documented have accelerated. Asia continues to attract more international students. European institutions are holding steady or growing. Traditional destinations are experiencing steeper enrolment declines.

What's changed most is how institutions are responding. What could have been considered as experimentation a year ago is now becoming standard practice. Budget cuts are more widespread. Staffing reductions are anticipated by more universities. Market diversification is becoming essential.

In a landscape marked by rapid change, having access to up-to-date, comparative benchmarks allows institutions to adapt with agility, anticipate risks, and seize emerging opportunities.

> This ground-breaking initiative is equipping institutions with timely, actionable insights to navigate the evolving landscape of international enrolments.
>
> **Andrew Nye**
>
> Assessment Director at Oxford University Press

Key findings from 461 universities across 63 countries

Canada and US see sharp enrolment drops

82% of Canadian universities and 48% of US universities reported lower undergraduate enrolments; 71% of Canadian universities and 63% of US universities lost postgraduate students

Restrictive government policy is the biggest obstacle

This is a significant issue for 68% of universities surveyed .

US policy and visa concerns jump sharply

85% of US universities now see restrictive government policies and issues obtaining visas as a major problem, up from 58% in 2024.

UK affordability worst of any region

72% say tuition and living costs are a top barrier, up from 58% last year.

Canadian universities plan major cuts

60% will cut budgets and 50% will cut staff in the next year.

Universities are diversifying fast

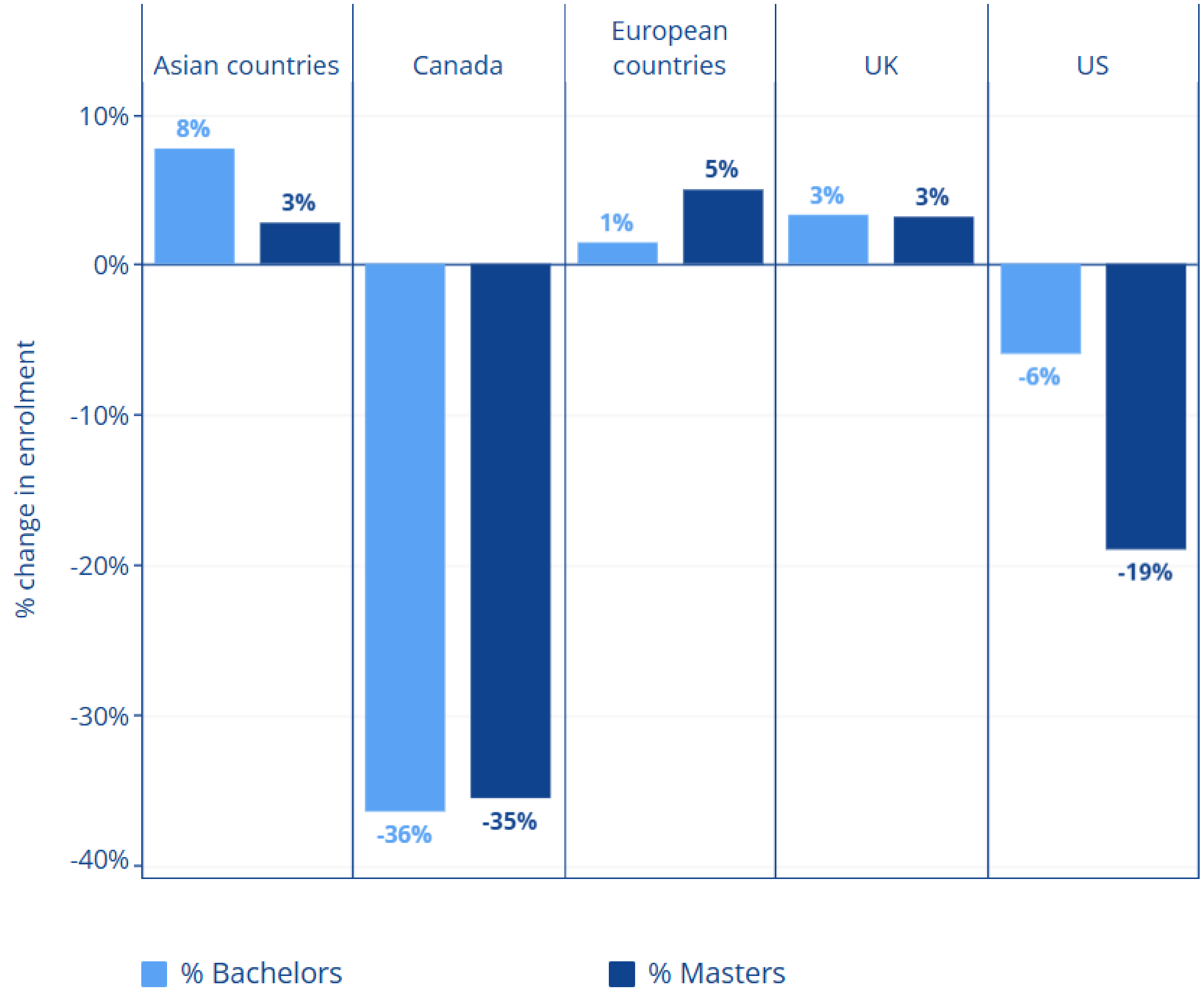
40% worldwide are looking for students in new markets.

How enrolments have evolved since the same intake last year

Undergraduate enrolments are generally higher, except in the US, where new international enrolments for Bachelor's dropped 6%, and in Canada, where enrolments dropped 36% on average. Enrolments in Asian countries grew by 8% on average.

Postgraduate enrolments were higher in Asia, Europe and the UK and fell sharply in Canada (down 35% on average) and the US (down 19% on average).

Average change in new international enrolments



We are navigating one of the most dynamic moments in international education, driven in no small part by shifts in U.S. visa and immigration policy. The ripple effects of these policy changes are being felt across campuses and communities around the world. This moment calls on our higher education institutions to be nimble and deeply attuned to the needs of their students—and it calls on us, as an ecosystem, to continue pressing policymakers for greater consistency and clarity throughout the international student journey.

Fanta Aw,
Executive director and CEO of NAFSA: Association of International Educators

Part Two

Regional trends

Where universities saw enrolment growth or decline

Enrolment shifts:

A SECTOR DIVERGING

How international student numbers changed across institutions

The data shows a clear split among institutions. At the undergraduate level, 37% saw their international enrolments go up, but 39% saw them go down. The situation is even tougher for postgraduate programs: 45% lost students while only 31% gained them.

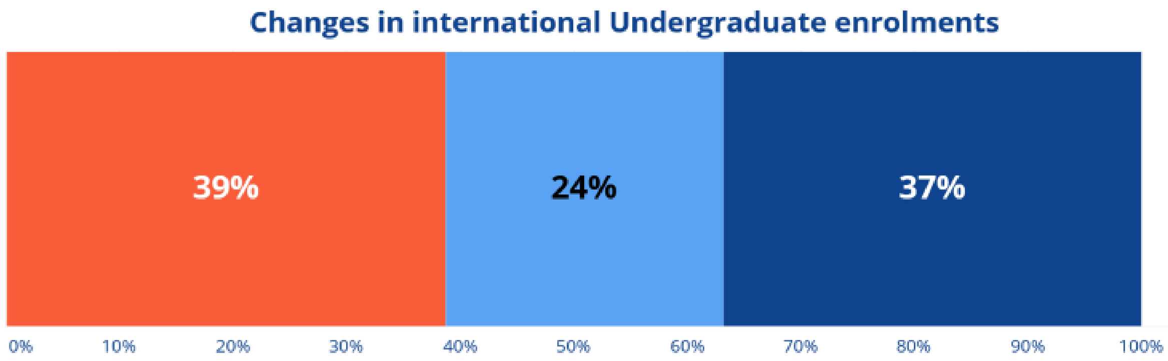
Here's what stands out

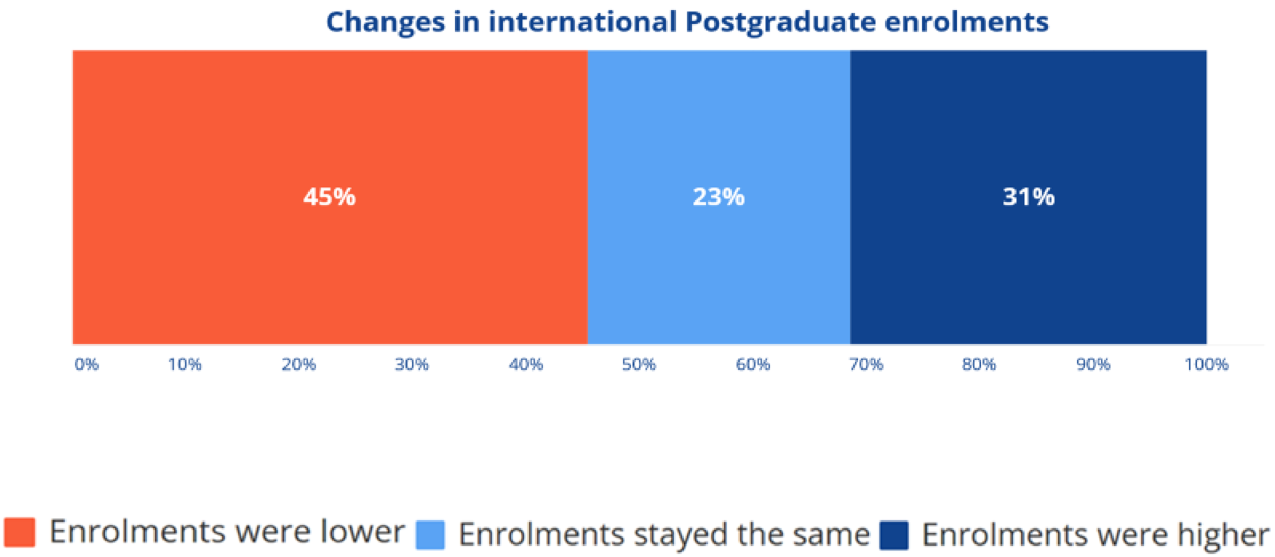
Only about a quarter held steady at either level. This means some schools are attracting international students while others are struggling to keep up.

The postgraduate drop is especially concerning since it affects nearly half of all institutions.

About this intake

the August to October intake is the largest of the year for many countries, particularly those in the Northern hemisphere. Almost 60% of English-taught programmes have a start date between August and October.





Undergraduate

Breaking it down by region

UNDERGRADUATE ENROLMENTS

Where institutions saw growth and decline

The enrolment split we saw earlier looks very different depending on where institutions are located.

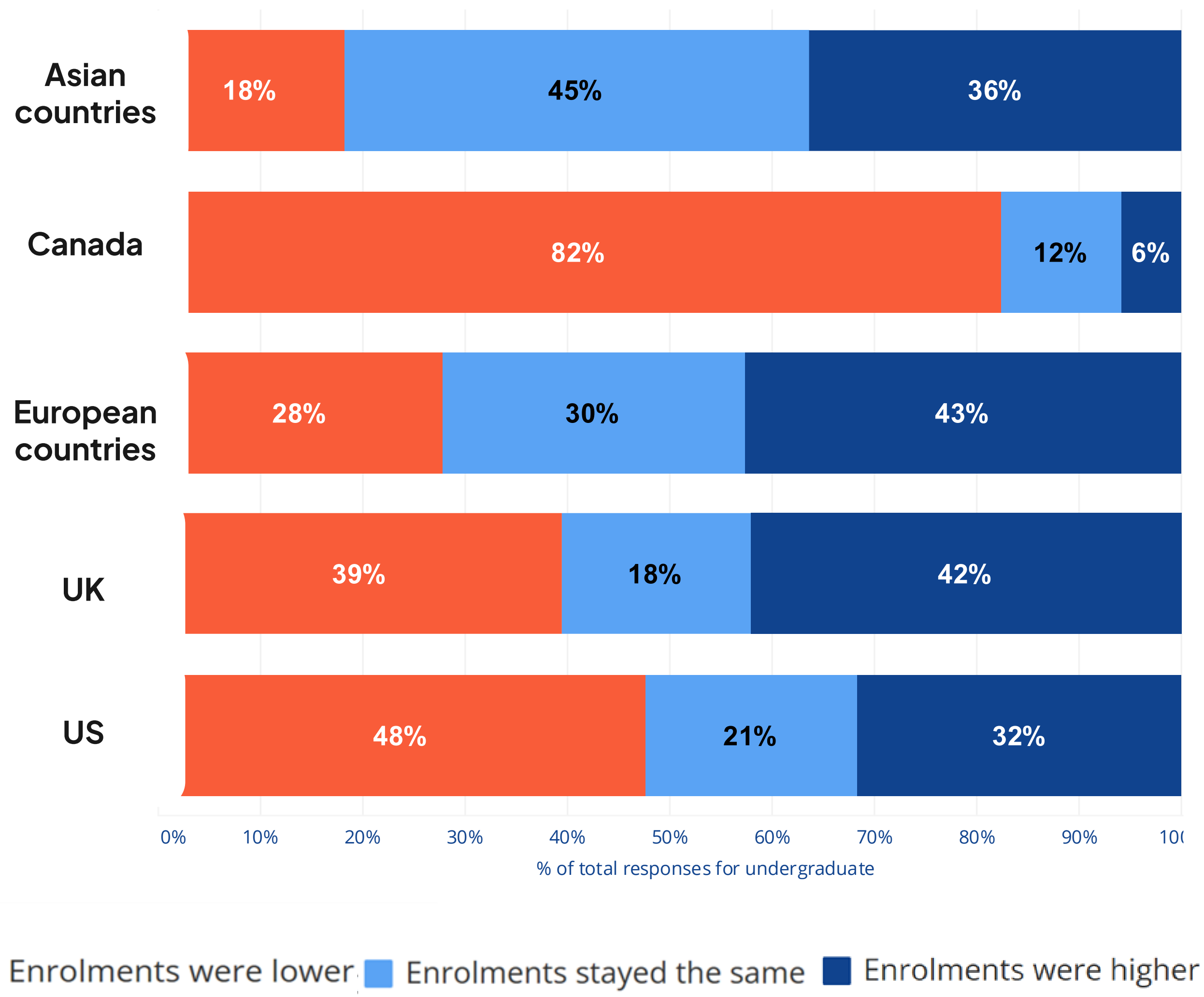
Canada and the US: Struggling to attract students
Canadian institutions faced the toughest challenge:

82% reported drops in international undergraduate enrolments. US institutions weren't far behind, with 48% seeing declines and only 32% gaining students.

The UK, Europe and Asia: More positive signs
More institutions reported higher enrolments in the UK and in European countries than reported stable or lower enrolments.

In Asian countries, there were still more institutions with higher than lower enrolments. The highest proportion of universities said enrolments stayed the same.

The postgraduate picture, as we'll see, presents even tougher challenges.



Postgraduate

Breaking it down by region

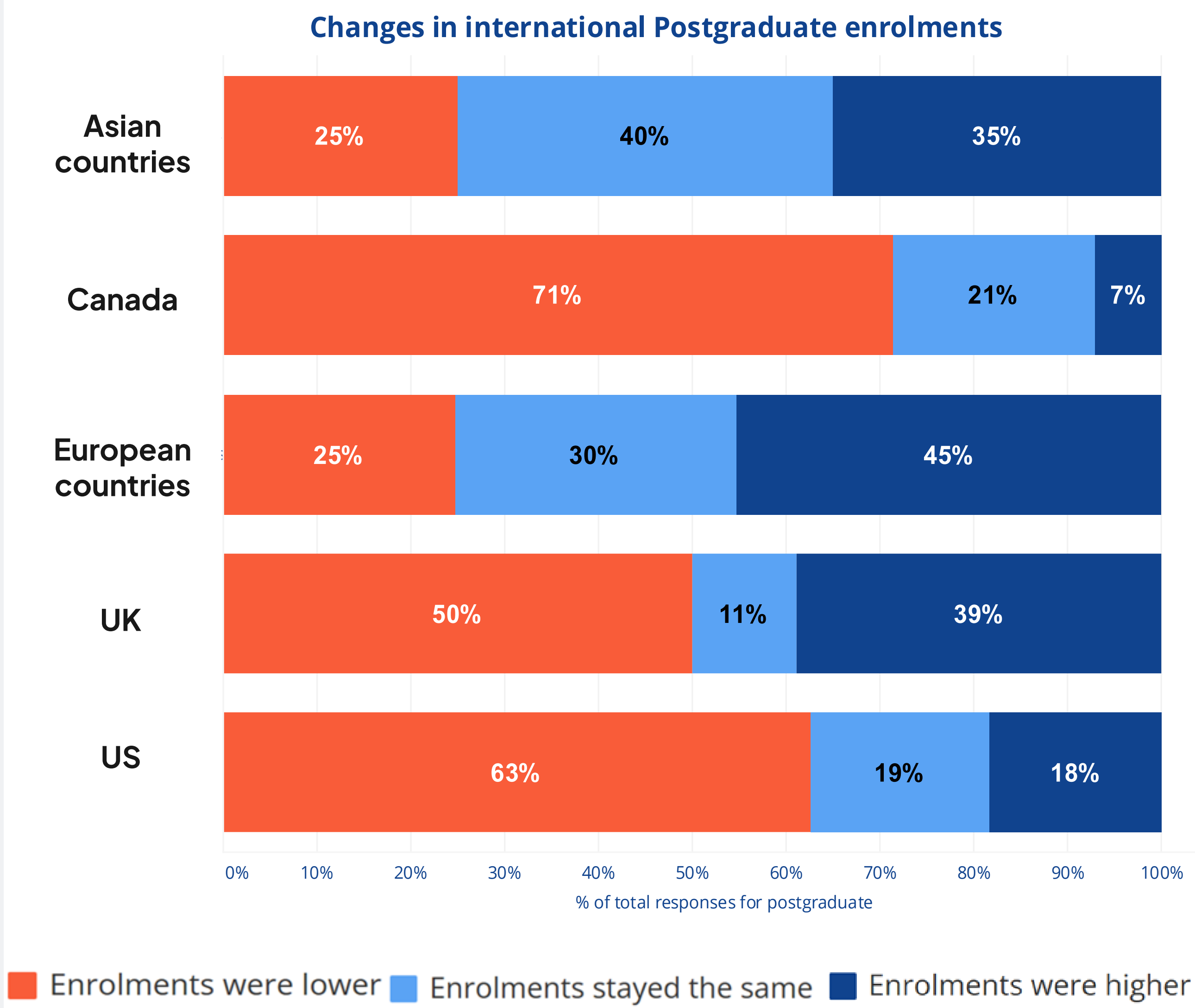
POSTGRADUATE ENROLMENTS

The postgraduate decline looks different depending on where institutions are located, and the picture is even tougher than what we saw for undergraduates.

North America : Facing major losses
Canada was hit the hardest: 71% of institutions reported drops in international postgraduate enrolments. The US followed closely with 63% seeing declines and only 18% gaining students.

A mixed picture for the UK
Half of all institutions in the UK saw lower postgraduate enrolment despite 39% reporting growth.

Europe and Asia: Holding stronger
European and Asian institutions showed more resilience, mirroring the undergraduate pattern. European countries saw 45% of institutions gain postgraduate students while just 25% lost them. 35% of Asian institutions surveyed reported enrolment growth, 25% reported declines, with a large middle group (40%) holding steady.



Part Three

Obstacles faced

Policy restrictions, visa challenges and affordability

The percentage of institutions that see these obstacles as a significant issue

Lack of suitable accommodation

21%
(Down from 29% in 2024)

Affordable tuition & cost of living

45%
(Down from 53% in 2024)

Meeting Academic requirements

12%
(Down from 14% in 2024)

Meeting English proficiency requirements

8%
(down from 11% in 2024)

Restrictive government policies / Issues obtaining a visa

68%
(Up from 51% in 2024)

Obstacles

	CANADA	EUROPE	US	UK	ASIA	OVERALL
#1	Restrictive government policies 90%	Restrictive government policies 59%	Restrictive government policies 85%	Affording tuition and cost of living 72%	A lack of suitable housing 35%	Restrictive government policies 68%
#2	Affording tuition and cost of living 15%	Affording tuition and cost of living 43%	Affording tuition and cost of living 47%	Restrictive government policies 51%	Affording tuition and cost of living 31%	Affording tuition and cost of living 45%
#3	Meeting academic requirements 8%	A lack of suitable housing 32%	A lack of suitable housing 35%	A lack of suitable housing 8%	Restrictive government policies 19%	A lack of suitable housing 21%

Restrictive government policies affect institutions across the world

Restrictive immigration policies will continue to impact international student enrollment. The proposed changes to the H-1B process and possible changes to CPT and OPT will impact decision-making regardless of the outcomes of those policy proposals.

US Institution

The government has missed a huge opportunity to rebrand Study UK and has chosen instead to 'tighten' and 'toughen up' the visa regime making the UK less attractive and seem less welcoming than ever before.

UK Institution

The ongoing IRCC policy changes—particularly the national cap on study permits, new proof-of-funds requirements, and shifting PGWP eligibility—have created uncertainty and damaged Canada's reputation as a reliable study destination.

Canadian Institution

Part Four

Plans for the next 12 months

What universities will do next

The percentage of institutions that see these plans as very likely in the next year

Budget cuts
26%
(Up from 22% in 2024)

Diversification into new markets
40%
(Up from 37% in 2024)

Expansion of online programmes
21%
(Down from 22% in 2024)

Increased use of artificial intelligence
25%
(Up from 21% in 2024)

Large changes to programmes
12%
(Down from 17% in 2024)

More aggressive enrolment goals
30%
(Down from 31% in 2024)

Staffing cuts
12%
(Up from 10% in 2024)

Diversification into new markets is a key concern across the globe

Falling volume of Chinese postgraduate enrolment can be attributed to various factors including the improving Chinese economy and job market, and more highly-ranked Chinese universities.

UK Institution

We're seeing sharp declines from major source markets like India and China, while interest grows in emerging regions such as Africa and Southeast Asia.

Canadian institution

We have been focusing within EEA for the past decade in student recruitment, I see enrolment numbers of the majority of these countries declined this intake. Knowing the political issues, and decrease of population due to birthrate, we are forced to shift the focus. But with limited resources, it's difficult to start from scratch.

EU institution

Most anticipated plans for the next 12 months

	CANADA	EUROPE	US	UK	ASIA	OVERALL
#1	Diversification into new markets 60%	Diversification into new markets 39%	Diversification into new markets 36%	Diversification into new markets 51%	More aggressive enrolment goals 27%	Diversification into new markets 40%
#2	Budget cuts 60%	More aggressive enrolment goals 35%	Budget cuts 28%	More aggressive enrolment goals 36%	Diversification into new markets 23%	More aggressive enrolment goals 30%
#3	Staffing cuts 50%	Budget cuts 19%	Expansion of online programmes 26%	Budget cuts 33%	Increased use of AI 12%	Budget cuts 26%

Part Five

Conclusion

What this means for international education

Conclusion

These latest survey findings reaffirm the profound influence of shifting government policies across major destinations, highlighting that the dynamics of global student mobility are shaped by a complex mix of political, geopolitical, economic, and demographic forces.

Beyond its operational importance, these survey findings enable institutions to engage policymakers with sector-wide evidence of the real-world impact of regulatory shifts. With unified, data-driven insights, the sector is better equipped to advocate for policy environments that sustain global talent flows, enhance economic contributions, and strengthen international collaboration.

> As the tides of politics ebb and flow, universities can be responsive by leveraging forward-looking data. Higher ed will remain international and the race for talent will only speed up, even if some governments don't have their eye on that ball for a while.
>
> **Edwin van Rest**
> CEO and co-founder at Studyportals

Part Six

Methodology

Survey design and approach

Survey design and administration

The Global Enrolment Benchmark Survey was conducted from 6 to 24 October 2025, through an online survey platform. The survey targeted international student recruitment professionals and senior administrators at higher education institutions worldwide, focusing on enrolment data for the January to March 2026 intake period.

The survey was distributed through partner networks including NAFSA: Association of International Educators, Oxford Test of English, Studyportals, The European Association of International Education (EAIE) Asia Pacific Association of International Education (APAIE), Universities UK International (UUKi), and the Canadian Bureau of International Education (CBIE), reaching institutions across the world.

Survey instrument

The survey consisted of multiple-choice and scaled response questions covering three primary areas:

- International student enrolment numbers by level of study (undergraduate, postgraduate taught, postgraduate research)
- Obstacles and barriers affecting student enrolment
- Institutional strategies and anticipated changes over the next 12 months

Sample composition

461 institutions from 63 countries completed the survey. The breakdown of responses per country and region can be found on the next pages. Institutional types varied and included public universities, private universities, research-intensive institutions, and teaching-focussed colleges. Participation was voluntary and institutions self-selected into the survey, which may introduce response bias.

Data quality and validation

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.

Analytical approach

Data were analysed using descriptive statistics, with findings aggregated at global, regional, and country levels where sample sizes permitted. Percentage calculations exclude non-responses unless otherwise noted. Regional comparisons focus on directional trends rather than statistical significance testing due to the non-probability sampling approach.

Student interest data

In addition to institutional survey responses, this report draws on Studyportals' proprietary student interest data, which tracks real-time search and engagement behaviour across millions of prospective students worldwide. By analysing anonymised activity on Studyportals' global platforms, this data provides an early indicator of shifts in international student demand.

Relative demand is the percentage of total pageviews in relation to the whole market. It is a good measure of market share.

Limitations

The response rate varied significantly across regions, potentially introducing geographic bias and limiting the ability to generalise 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.

Year-over-year comparisons should be interpreted carefully, as the responding institutions may not be identical across survey editions.

It is advised to follow best practices and consult multiple data sources for decision-making. Institutions are advised to triangulate these findings with official government statistics, institutional data, and market-specific research relevant to their strategic priorities.

Groupings

Asian countries

Country	Number of Respondents
Azerbaijan	1
China	2
Georgia	1
Hong Kong	1
India	2
Indonesia	1
Iraq	1
Israel	1
Japan	4
Malaysia	3
Myanmar	1
Republic of Korea	1
Singapore	3
Taiwan	1
Thailand	2
Vietnam	1
Total	**26**

Canada

Country	Number of Respondents
Canada	20

UK

Country	Number of Respondents
United Kingdom	39

US

Country	Number of Respondents
United States	201

Groupings

European countries

Country	Number of Respondents	Country	Number of Respondents
Albania	1	Lithuania	5
Austria	6	Malta	1
Belgium	10	Norway	2
Czech Republic	6	Poland	4
Denmark	1	Portugal	4
Estonia	1	Romania	2
Finland	8	Russia	1
France	12	Slovak Republic	1
Germany	13	Slovenia	1
Hungary	6	Spain	11
Ireland	6	Sweden	1
Italy	11	Switzerland	5
Latvia	2	The Netherlands	12
		Total	**133**

Other

Country	Number of Respondents	Country	Number of Respondents
Algeria	1	Liberia	1
Argentina	1	Mexico	3
Australia	9	New Zealand	5
Brazil	1	Nigeria	1
Chile	1	Puerto Rico	1
Dominican Republic	1	Saudi Arabia	2
Egypt	1	South Africa	2
Ghana	2	Turkey	6
Kenya	2	United Arab Emirates	2
		Total	**42**

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Analytics & Consulting

Want to understand mobility trends more deeply and turn that knowledge into real enrolment growth?
Contact us: **hello@studyportals.com**