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# INTERNATIONAL INSIGHTS: **TRENDS FROM THE 30 JUNE DEADLINE**

DES CUTCHEY & FELICITY LLOYD  
22 July 2025





# KEY HEADLINES FROM 30 JUNE 2025

+1.3%

ALL APPLICANTS

665,070

656,790 in 2024

+2.2%

UK 18-YEAR-OLD

328,390

321,410 in 2024

+2.2%

INTERNATIONAL

138,460

135,490 in 2024

# TOP 5 INTERNATIONAL MARKETS

2024

CHINA 30,860



INDIA 12,750



USA 6,960



HONG KONG 5,410



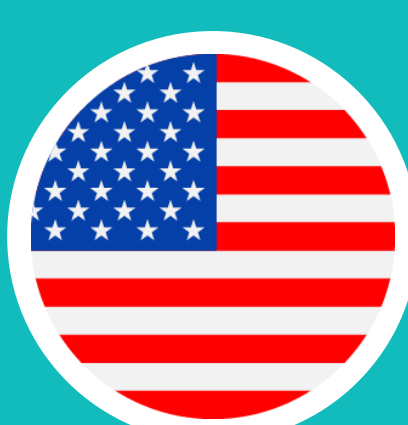
IRELAND 5,290



CHINA 33,870 (+9.7%)



INDIA 11,310 (-11.3%)



USA 7,930 (+14%)



IRELAND 6,060 (+14.7%)



HONG KONG 5,090 (-6.0%)

2023



# GROWTH MARKETS



**CHINA (+3,010) +9.7%**



**USA (+970) +14.0%**



**IRELAND (+780) +14.7%**



**TURKEY (+690) + 23.3%**



**NIGERIA (+600) +23.2%**

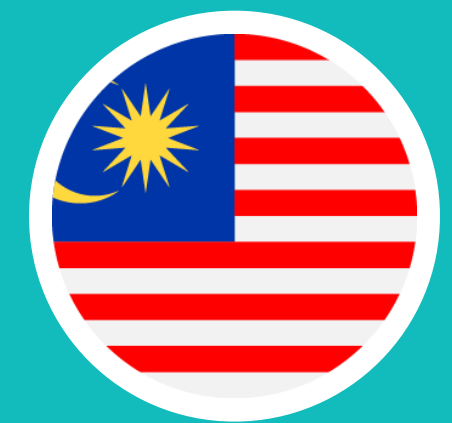




# DECLINING MARKETS



INDIA (-1,440) -11.3%



MALAYSIA (-360) -8.3%



HONG KONG (-330) -6.0%



FRANCE (-180) -6.3%

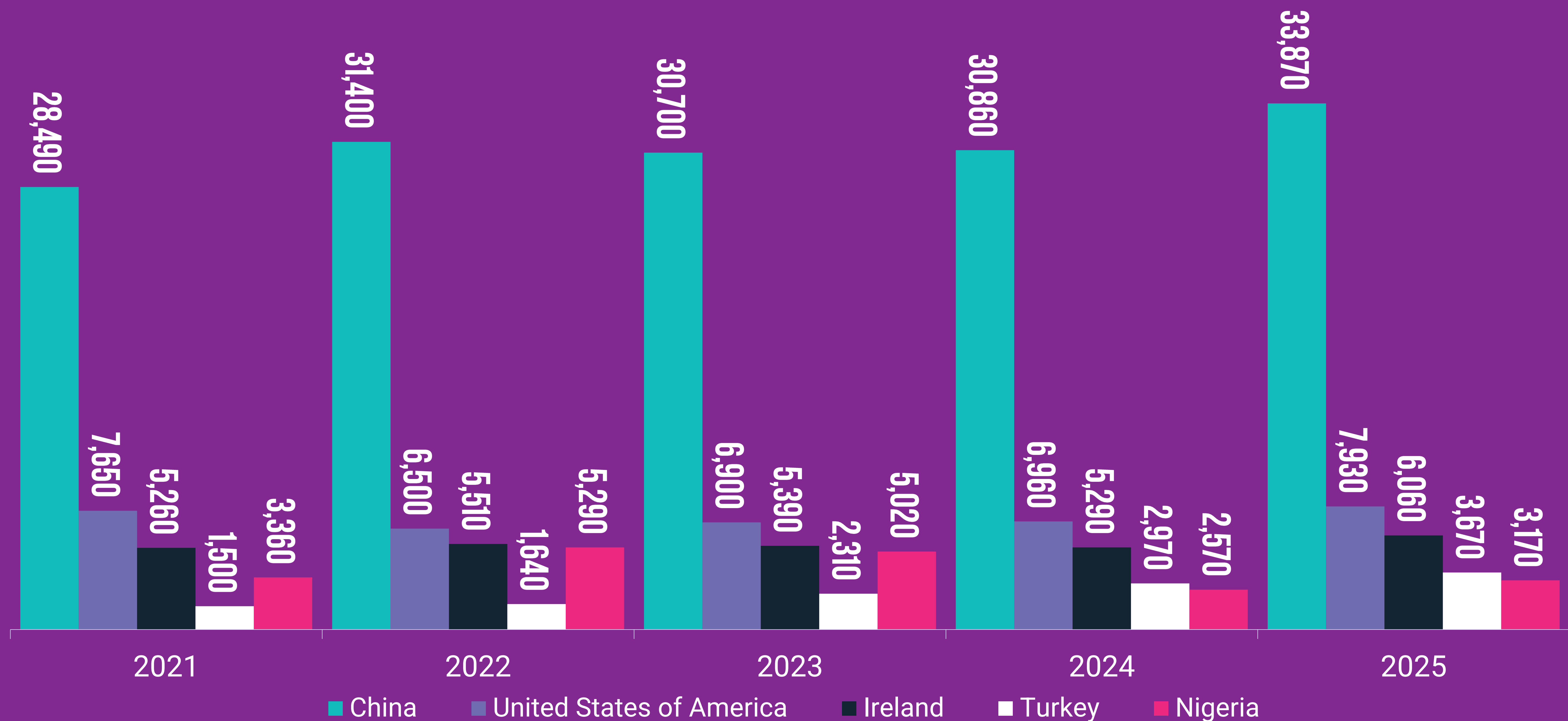


SINGAPORE/S. AFRICA (-150) -3.7%



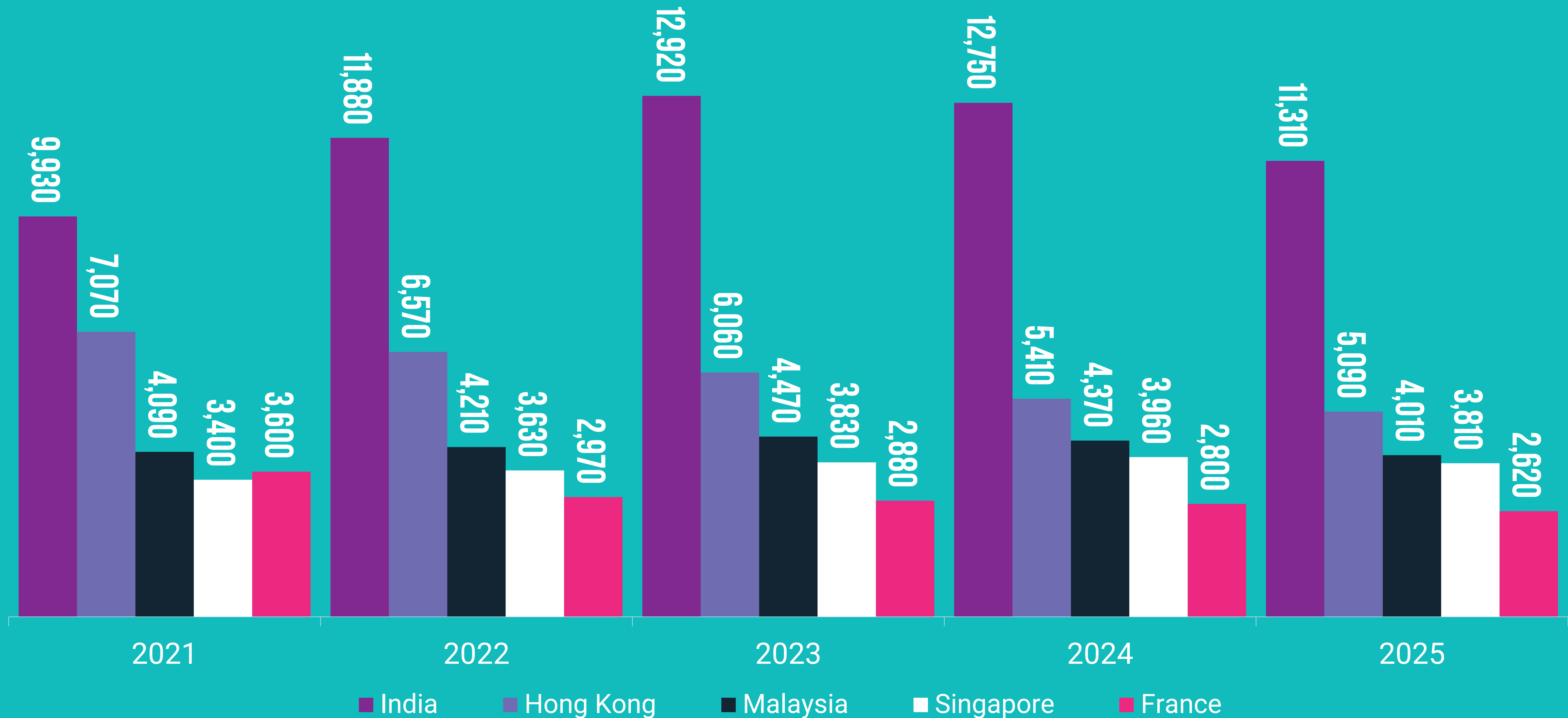


# FIVE-YEAR VIEW OF 2025 GROWTH MARKETS





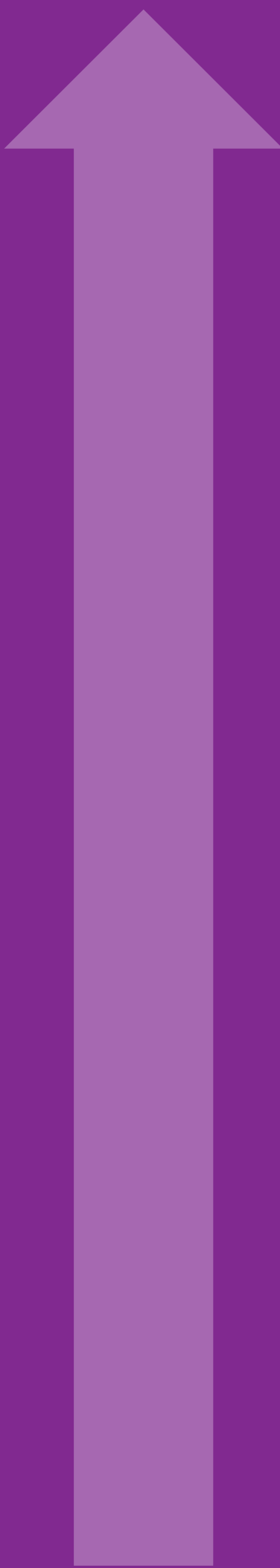
# FIVE-YEAR VIEW OF 2025 DECLINING MARKETS





# SUBJECT TRENDS: INCREASES

The highest increases in international applications have been in:



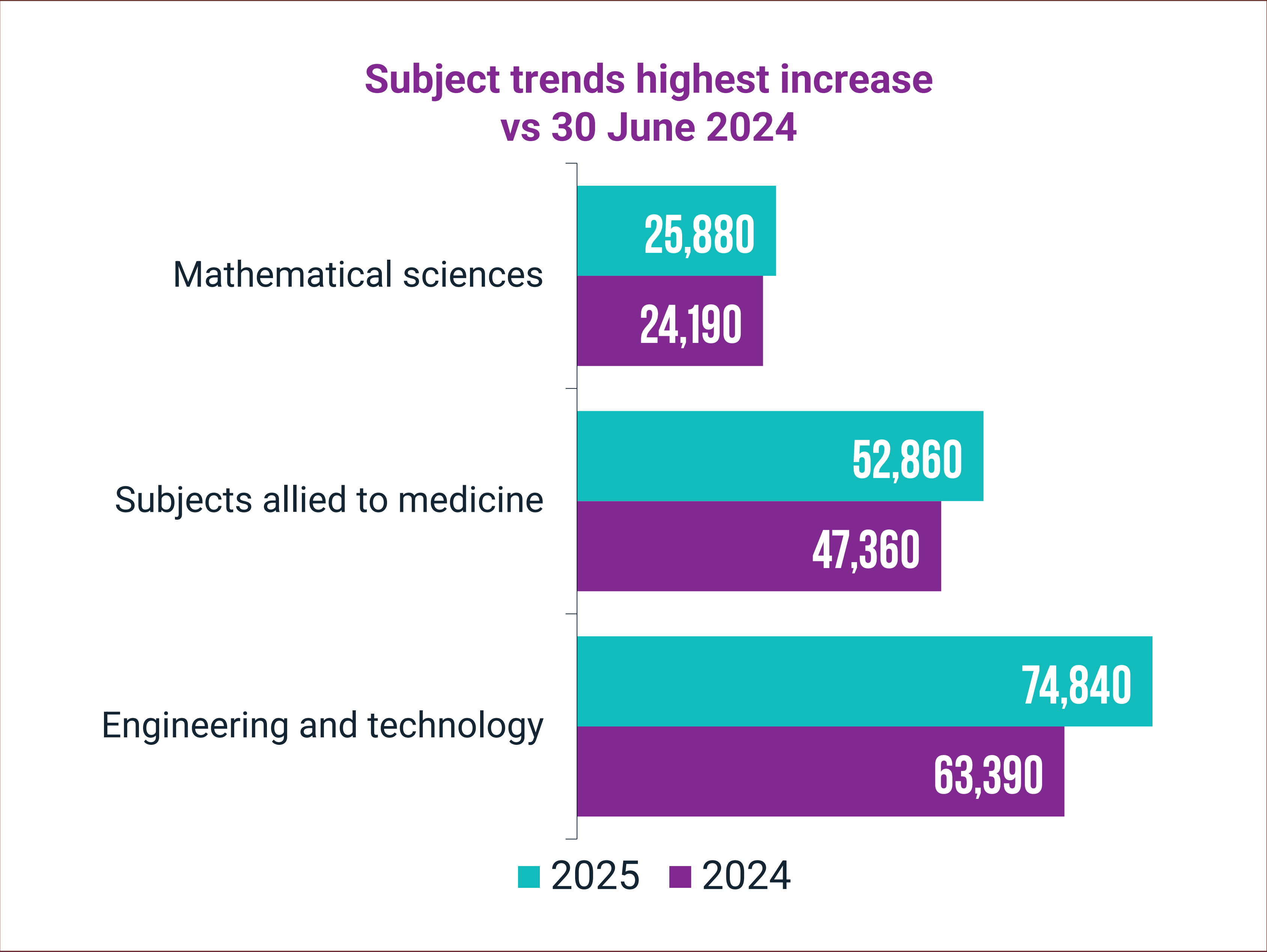
Engineering and technology  
(+11,450, +18.1%)



Subjects allied to medicine  
(+5,510, 11.6%)



Mathematical sciences  
(+1,700, 7%)





# SUBJECT TRENDS: DECREASES

The biggest decreases in international applications have been in:



Computing  
(-4,160, -8.7%)

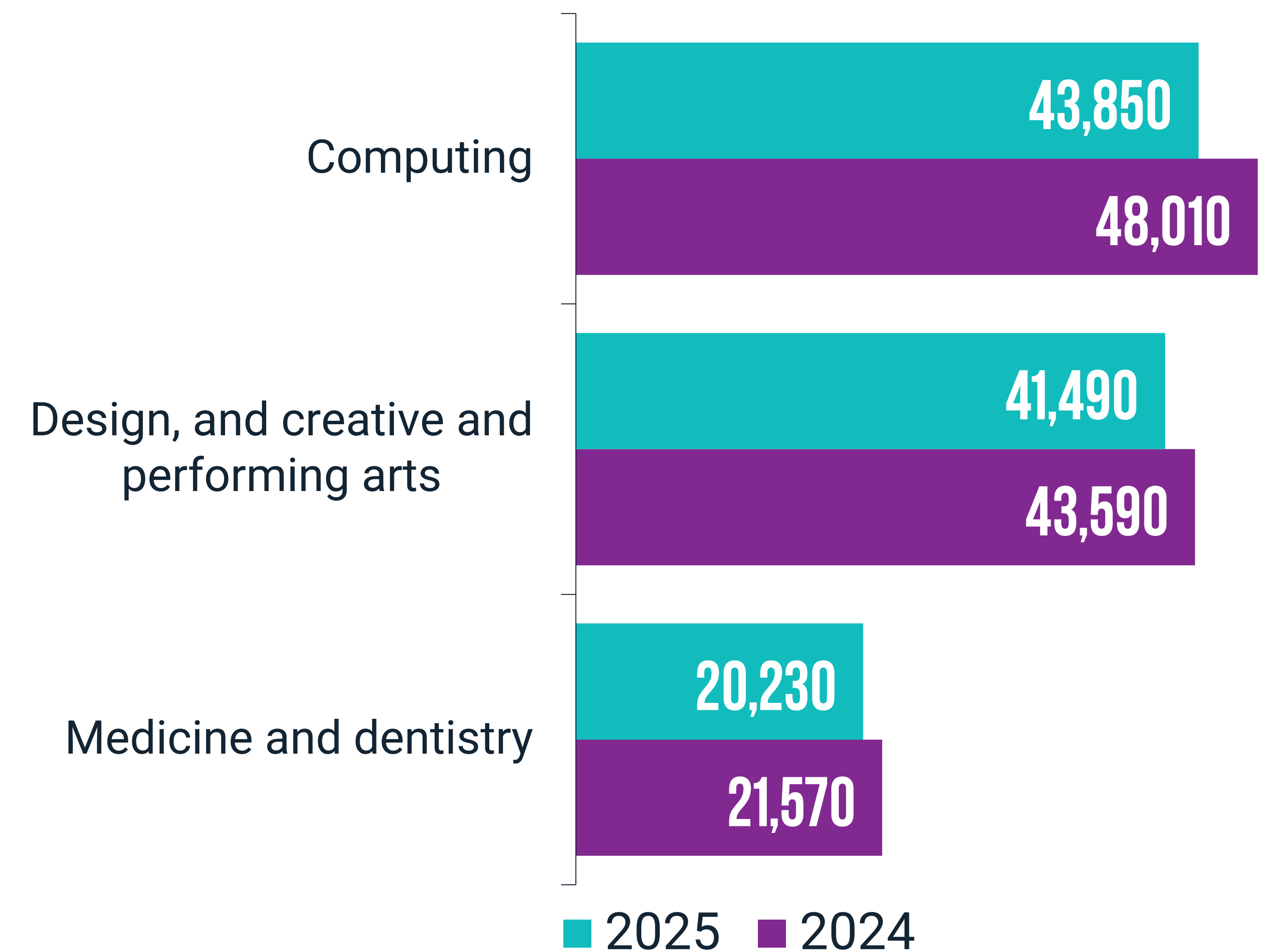


Design, creative and  
performing arts  
(-2,090, -4.8%)



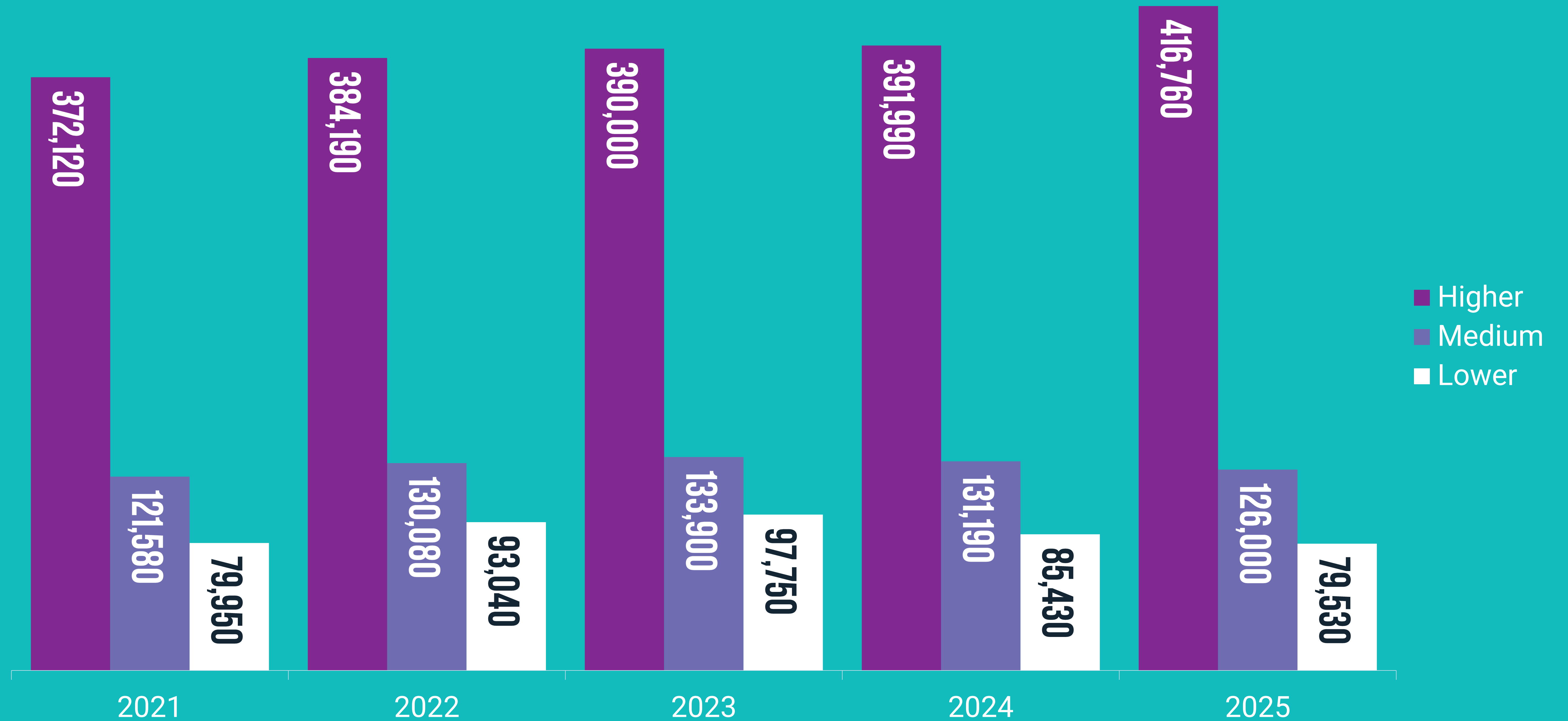
Medicine and dentistry  
(-1,340, -6.2%)

Subject trends biggest decrease  
vs 30 June 2024



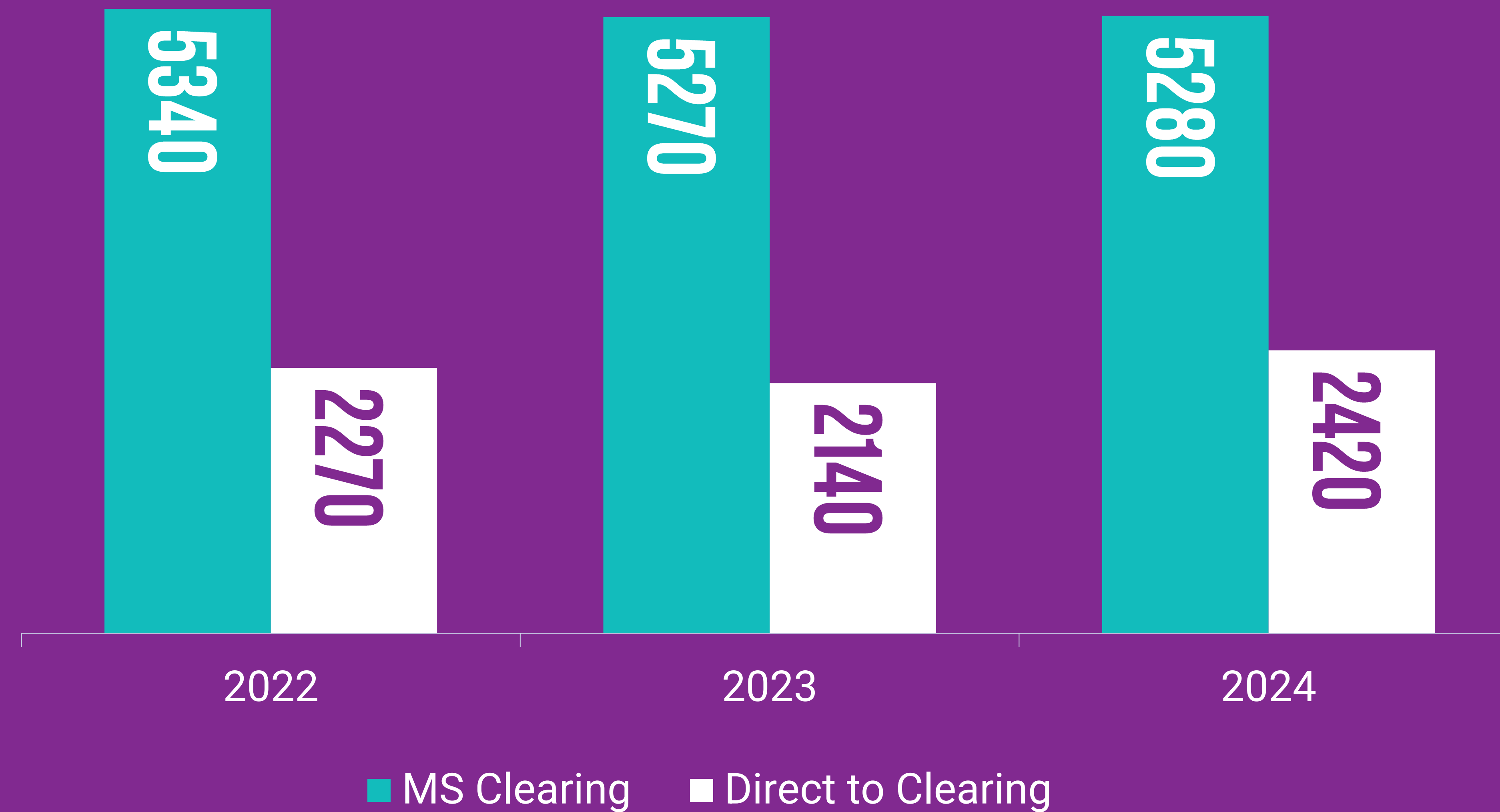


# TARIFF GROUPS AND TRENDS





# 3-YEAR TRENDS FOR CLEARING APPLICANTS



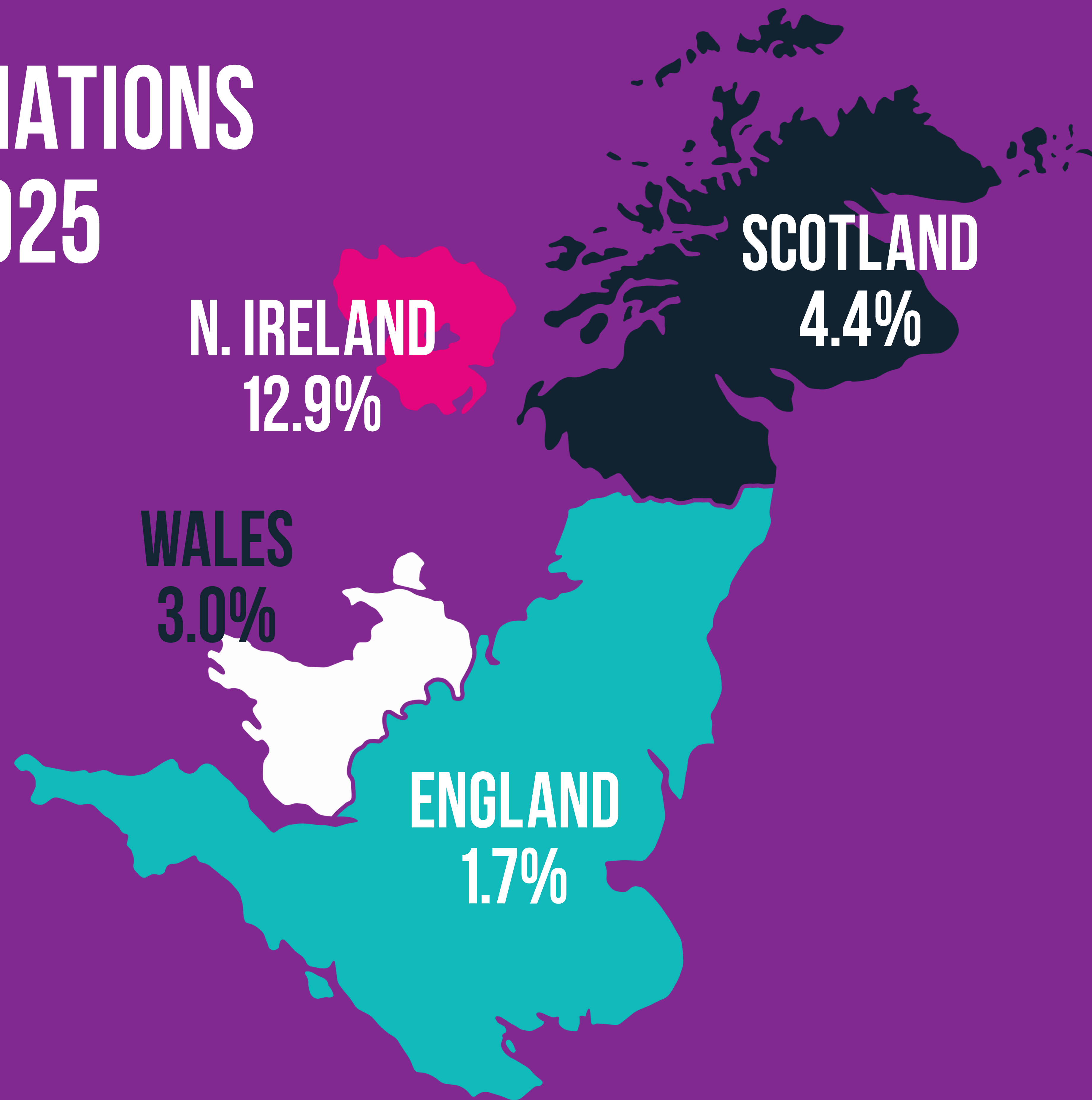


# 3-YEAR TRENDS FOR CLEARING ACCEPTS



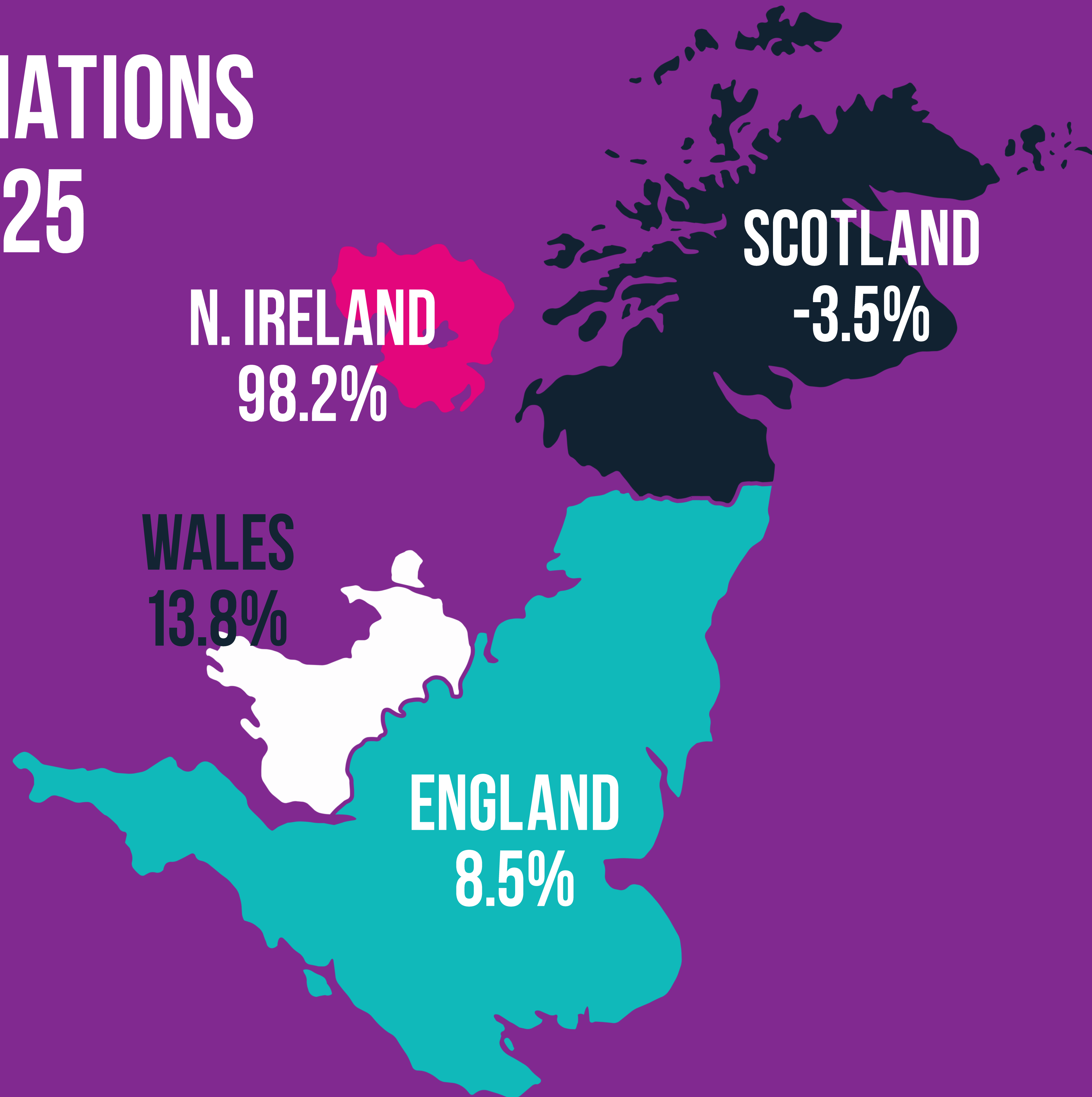


# THE FOUR NATIONS 2024 VS 2025





# THE FOUR NATIONS 2021 VS 2025





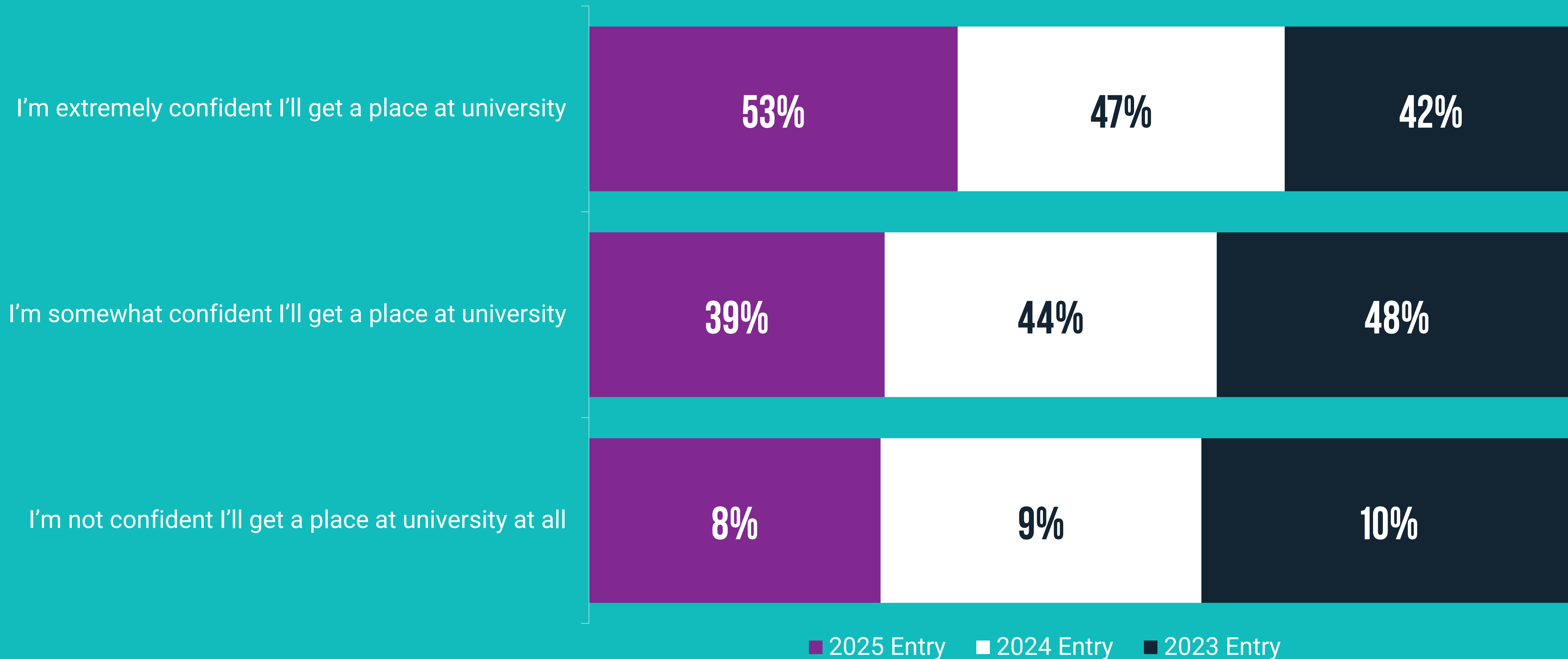
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# INTERNATIONAL STUDENT INSIGHTS



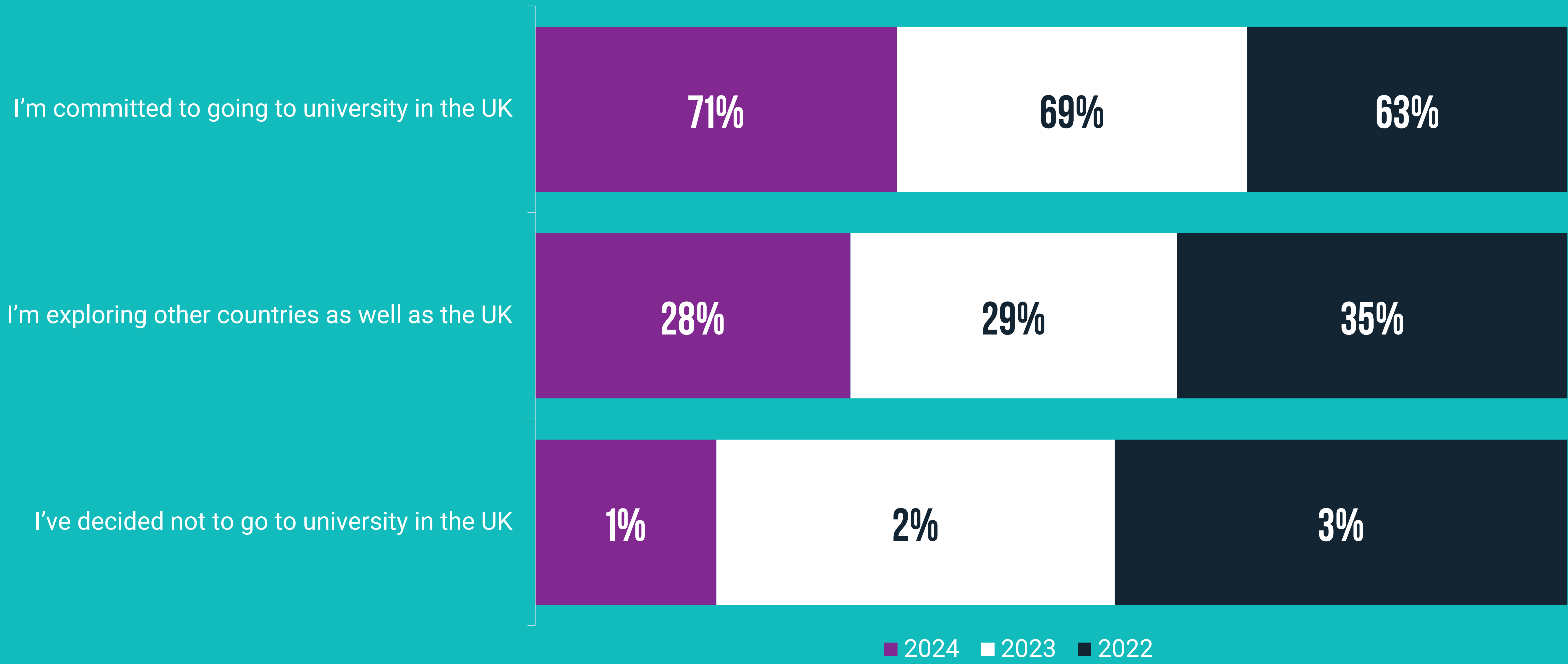


# CONFIDENCE LEVELS OF GOING TO UNIVERSITY



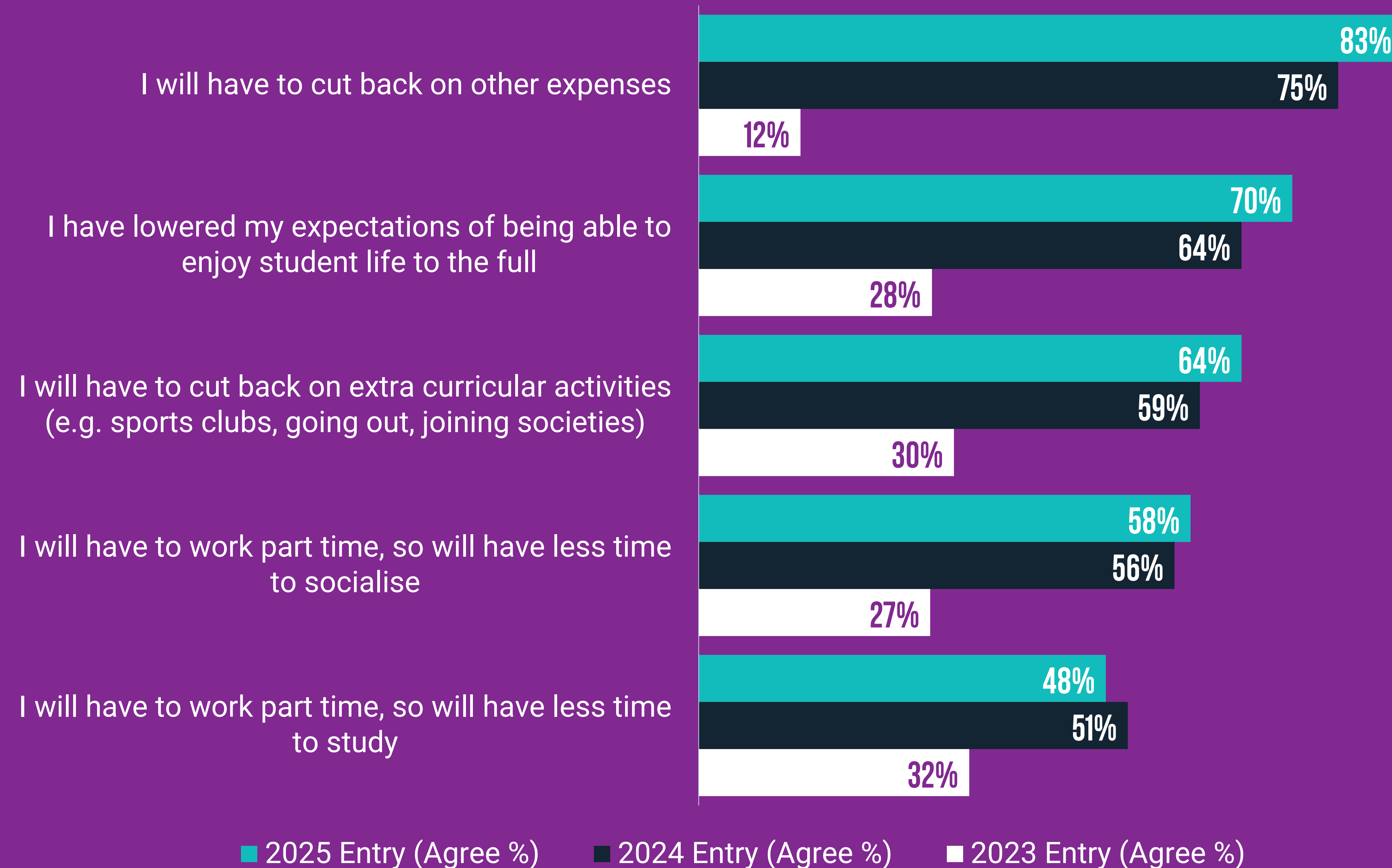


# COMMITMENT LEVELS OF GOING TO UNIVERSITY IN THE UK



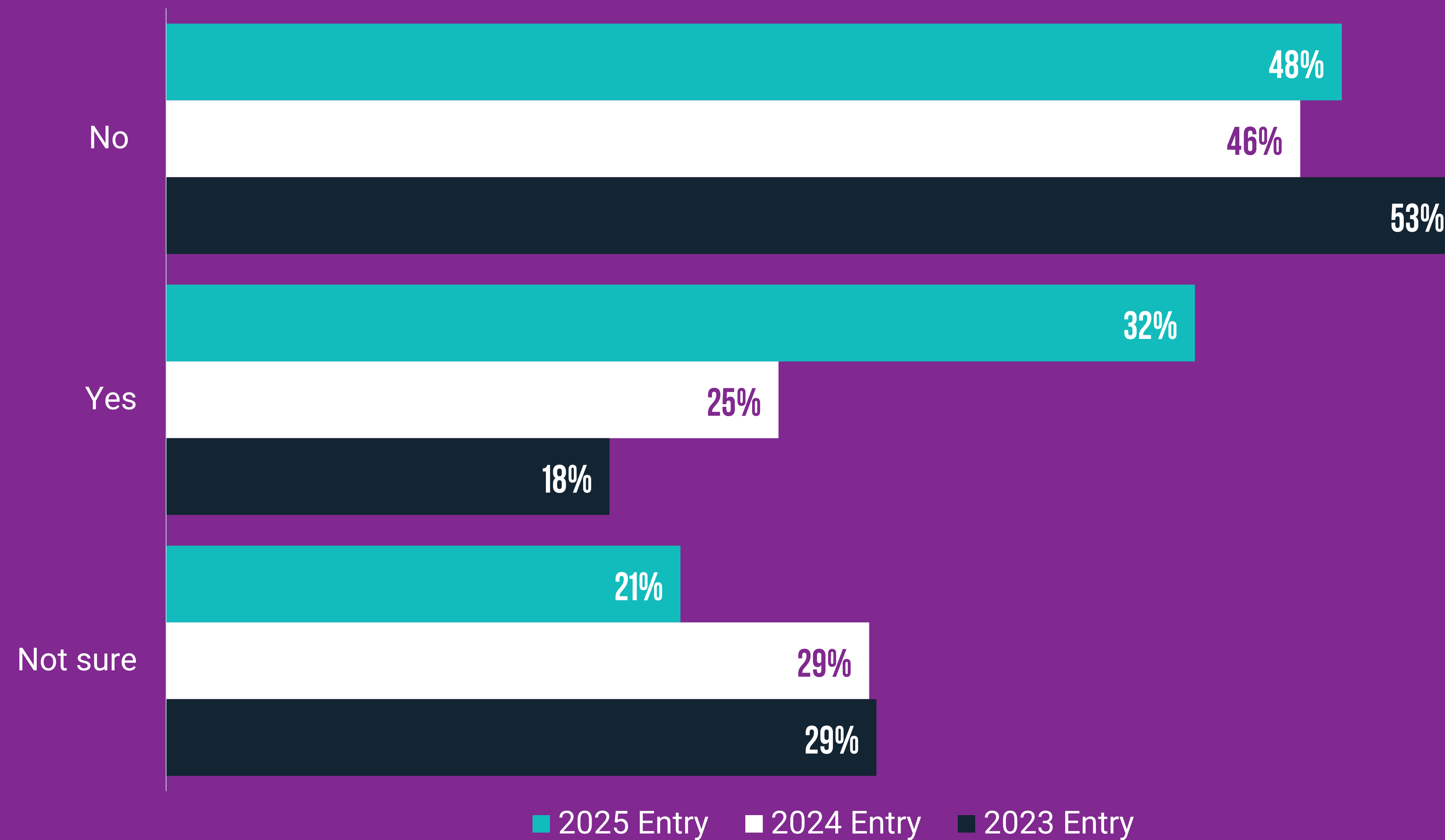


# PERCEIVED COST OF LIVING IMPACT ON UNIVERSITY LIFE



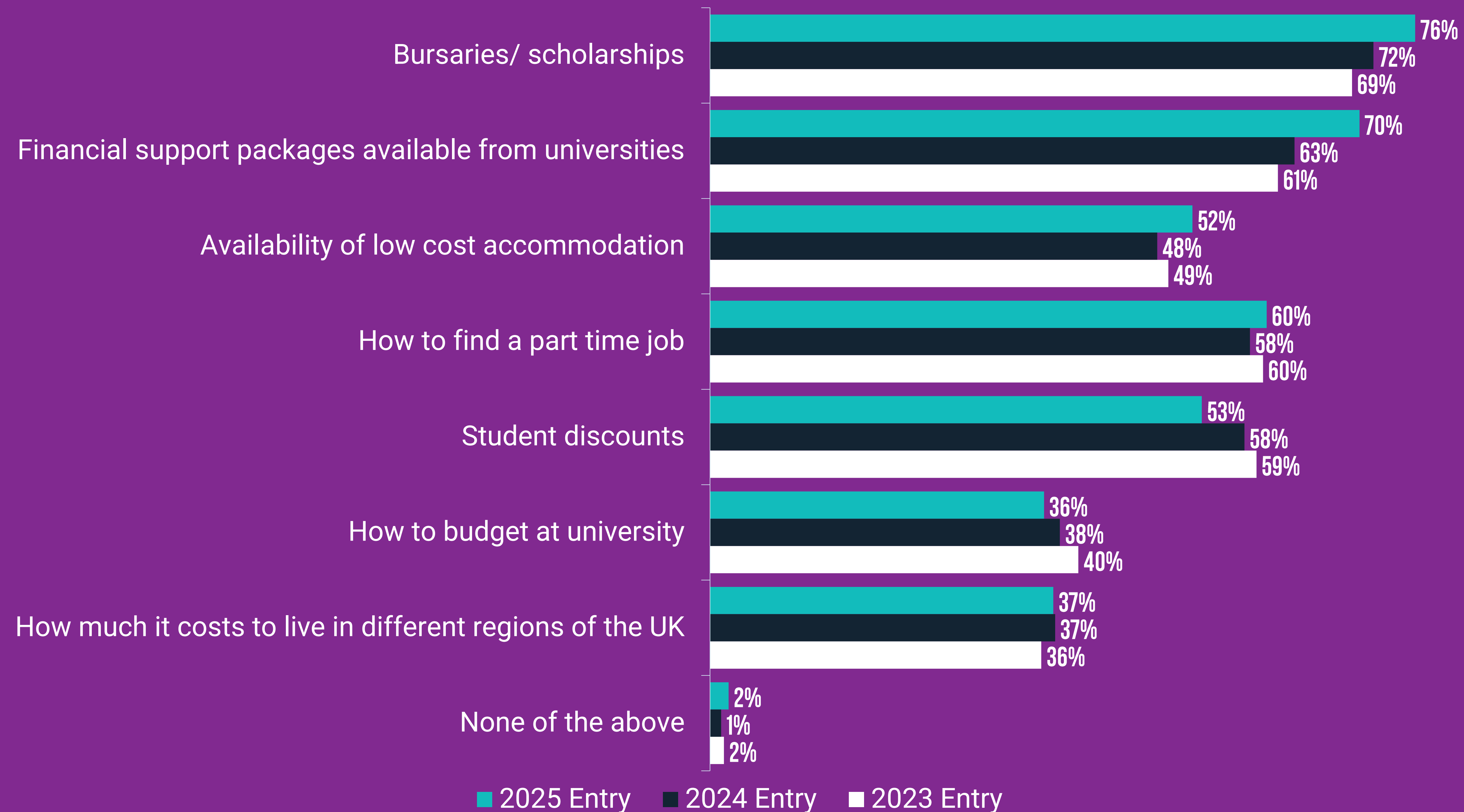


# DO STUDENTS RECALL RECEIVING ANY COST-OF-LIVING INFORMATION FROM PROVIDERS?





# NAVIGATING RISING LIVING COSTS: WHAT INFORMATION DO STUDENTS NEED?





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# UK REMAINS THE TOP CHOICE - INCLUDING UNDECIDED STUDENTS

INTERNATIONAL PULSE SURVEY 2025





# WHY SOME STUDENTS RECONSIDERED DESTINATIONS

**RISING TUITION  
AND LIVING  
COSTS**

**PERCEIVED BETTER  
OPPORTUNITIES IN  
OTHER COUNTRIES**

**IMPROVED  
EMPLOYMENT  
PROSPECTS  
ELSEWHERE**



# WHAT'S INFLUENCING STUDENT CHOICES?

## CONCERNS INFLUENCING RECONSIDERATION:

- Visa restrictions and delays
- Political instability and safety issues
- Discrimination and a lack of inclusivity
- Reduced access to scholarships and funding
- Hostile environments for LGBTQ+ and minority students





# WHAT'S INFLUENCING STUDENT CHOICES?

## WHAT STUDENTS VALUE WHEN CHOOSING A COUNTRY:

- Reputation and global recognition of universities
- Costs, including tuition and living expenses
- Internationally recognised qualifications
- Availability of scholarships and financial aid
- Safety and inclusivity





# QUESTIONS?