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INTERNATIONAL INSIGHTS: END OF CYCLE DATA 2025

Des Cutchey

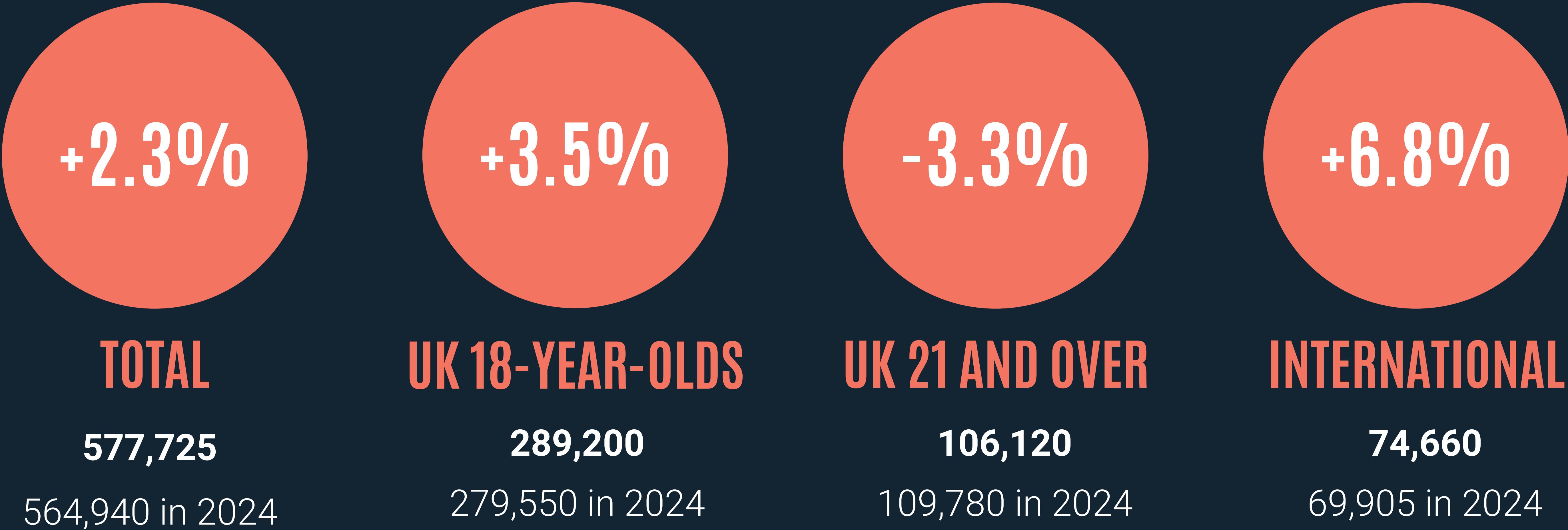
Head of International Strategy

Felicity Lloyd

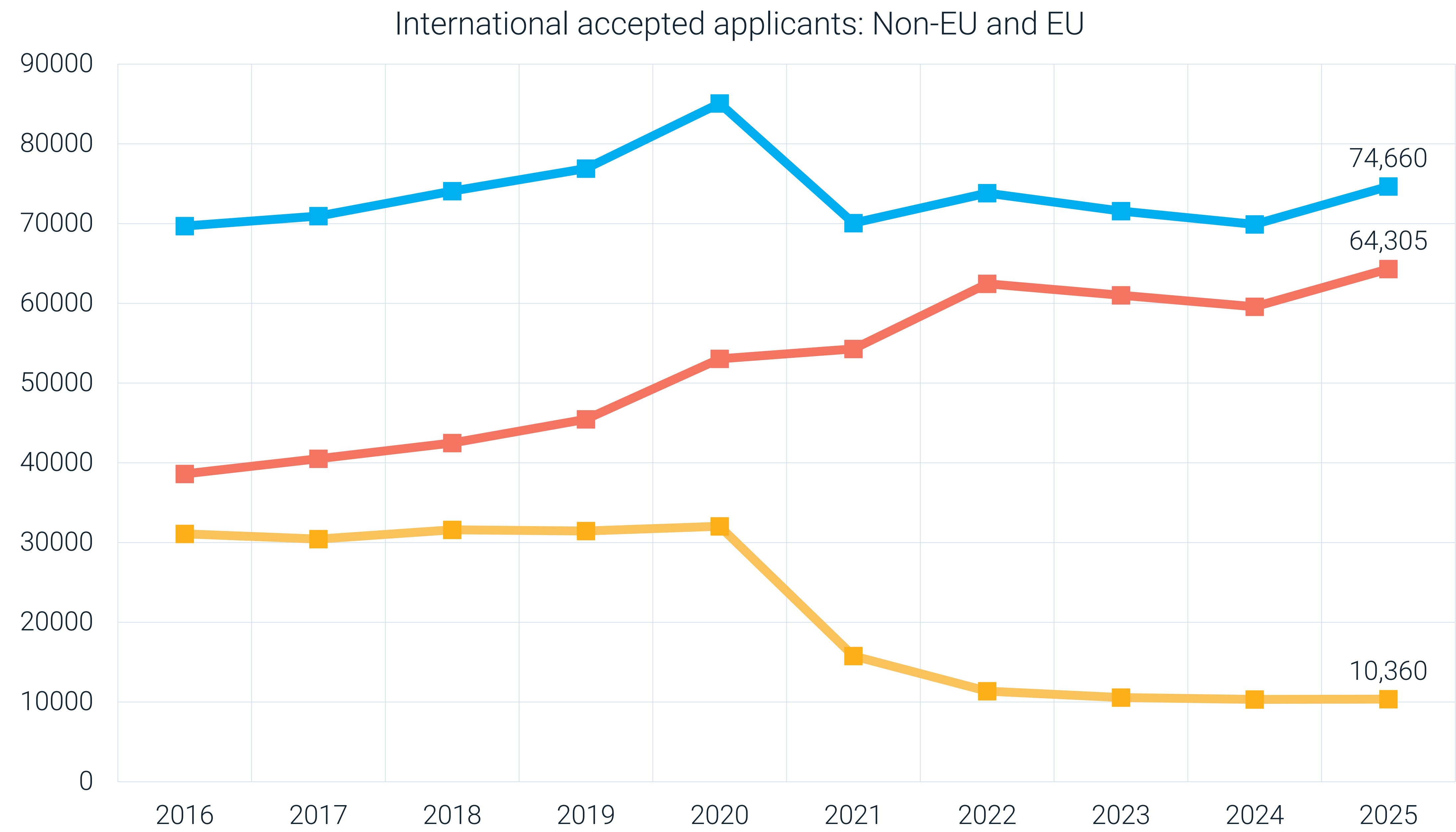
International Development Manager



ACCEPTANCES AT END OF CYCLE 2025



ACCEPTED APPLICANTS - INTERNATIONAL



+6.8%

All International
74,660 applicants
+4,760 vs 2024

+7.9%

Non EU
64,305 applicants
+4,730 vs 2024

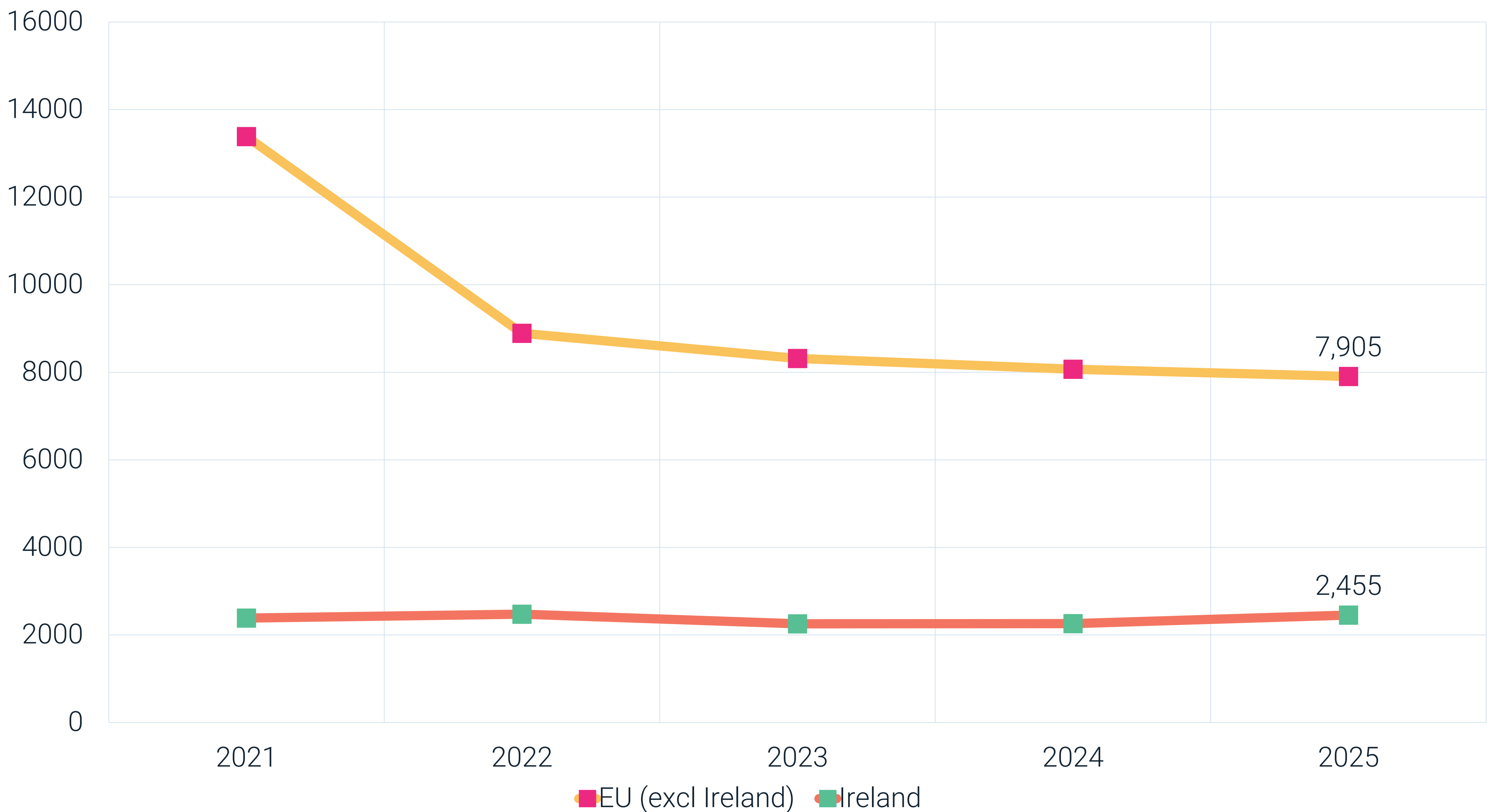
+0.3%

EU
10,360 applicants
+30 vs 2024

The proportion of all acceptances that are international is 12.9% in 2025, which is an increase of 0.5pp vs 2024 but still below the 14.9% seen in 2020.

ACCEPTED APPLICANTS - EU (IRELAND & OTHER)

International accepted applicants from the EU and Ireland



-2.1%

EU (excl. Ireland)
7,905 applicants
-165 vs 2024

+8.6%

Ireland
2,455 applicants
+195 vs 2024

INTERNATIONAL MARKET REVIEW

TOP 5 LARGEST INTERNATIONAL MARKETS



CHINA
19,480 Accepts



INDIA
5,295 Accepts



HONG KONG
2,870 Accepts



USA
2,775 Accepts



IRELAND
2,455 Accepts

INTERNATIONAL MARKET REVIEW

TOP 5 GROWTH MARKETS



CHINA

+2,415

Increase of 14%



NEPAL

+1,210

Increase of 133%



PAKISTAN

+940

Increase of 70%



BANGLADESH

+410

Increase of 103%



TURKEY

+375

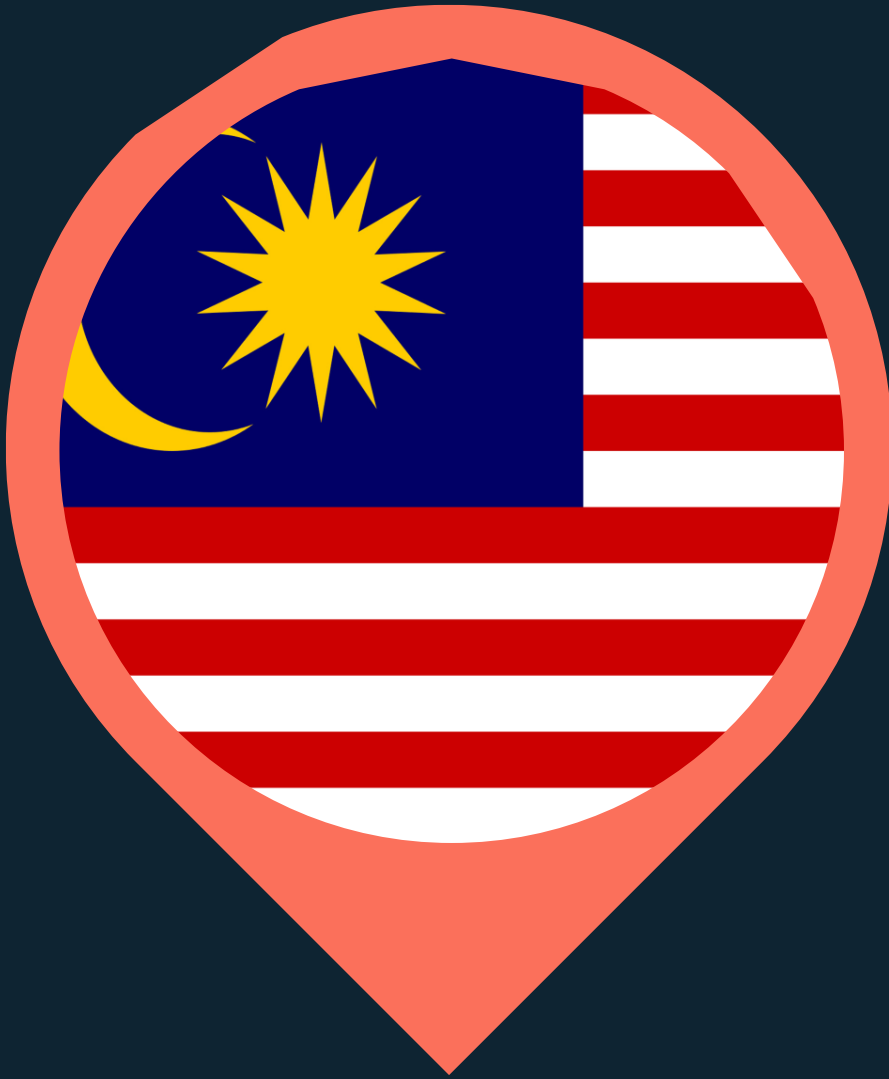
Increase of 26%

INTERNATIONAL MARKET REVIEW

TOP 5 DECLINING MARKETS



INDIA
-510
 Decrease of 9%



MALAYSIA
-305
 Decrease of 11%



HONG KONG
-225
 Decrease of 7%



THAILAND
-110
 Decrease of 16%



KUWAIT
-100
 Decrease of 9%

INTERNATIONAL ACCEPTANCES: SUBJECT REVIEW

TOP 5 SUBJECTS

BUSINESS & MANAGEMENT



17,710 Accepts
Up 10.9% from 15,980 in 2024

SOCIAL SCIENCES



8,020 Accepts
Up 10.2% from 7,270 in 2024

ENGINEERING & TECHNOLOGY



8,020 Accepts
Up 10.2% from 7,270 in 2024

DESIGN, CREATIVE & PERFORMING
ARTS



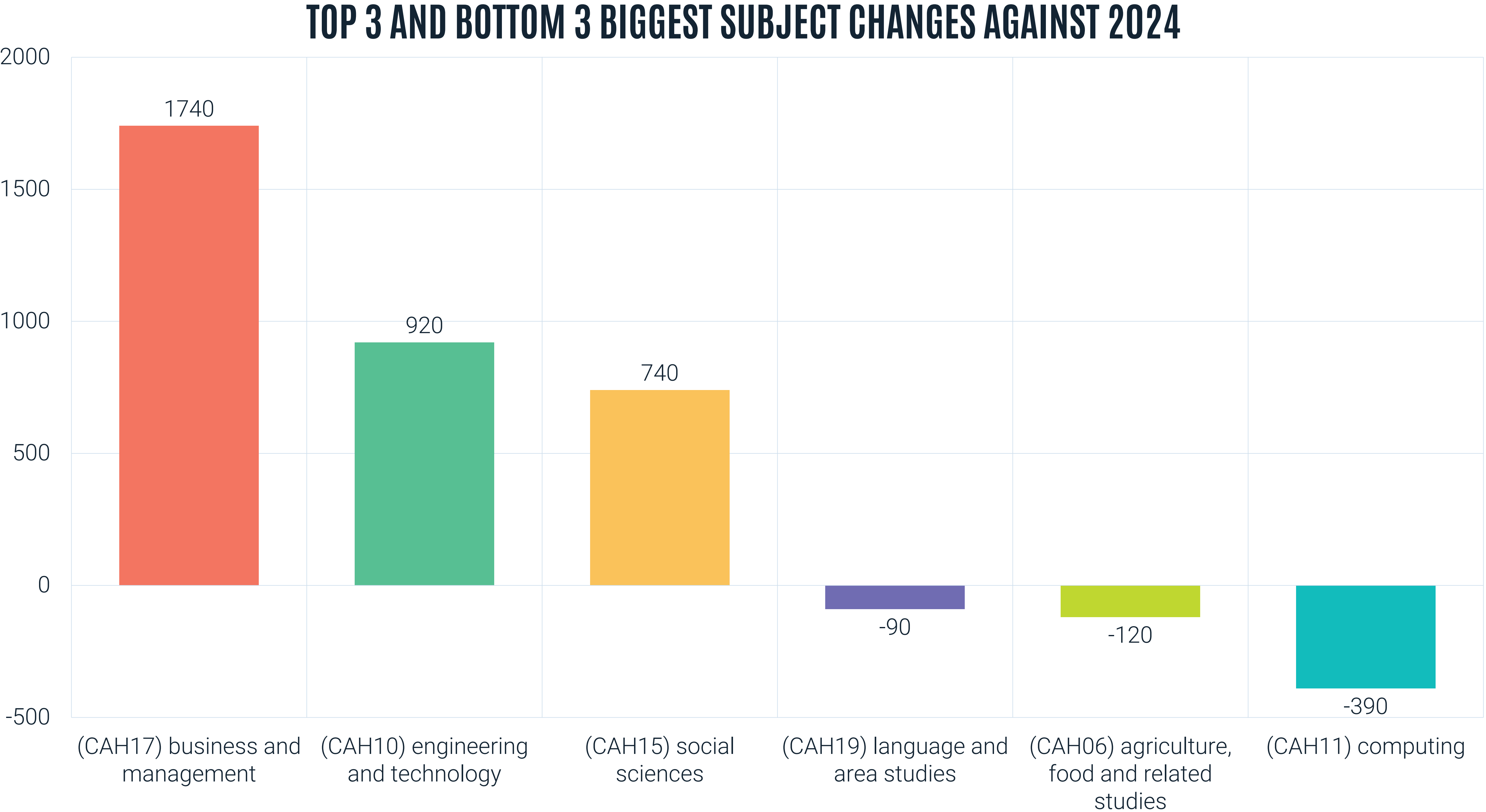
5,010 Accepts
Up 4.3% from 5,670 in 2024

LAW

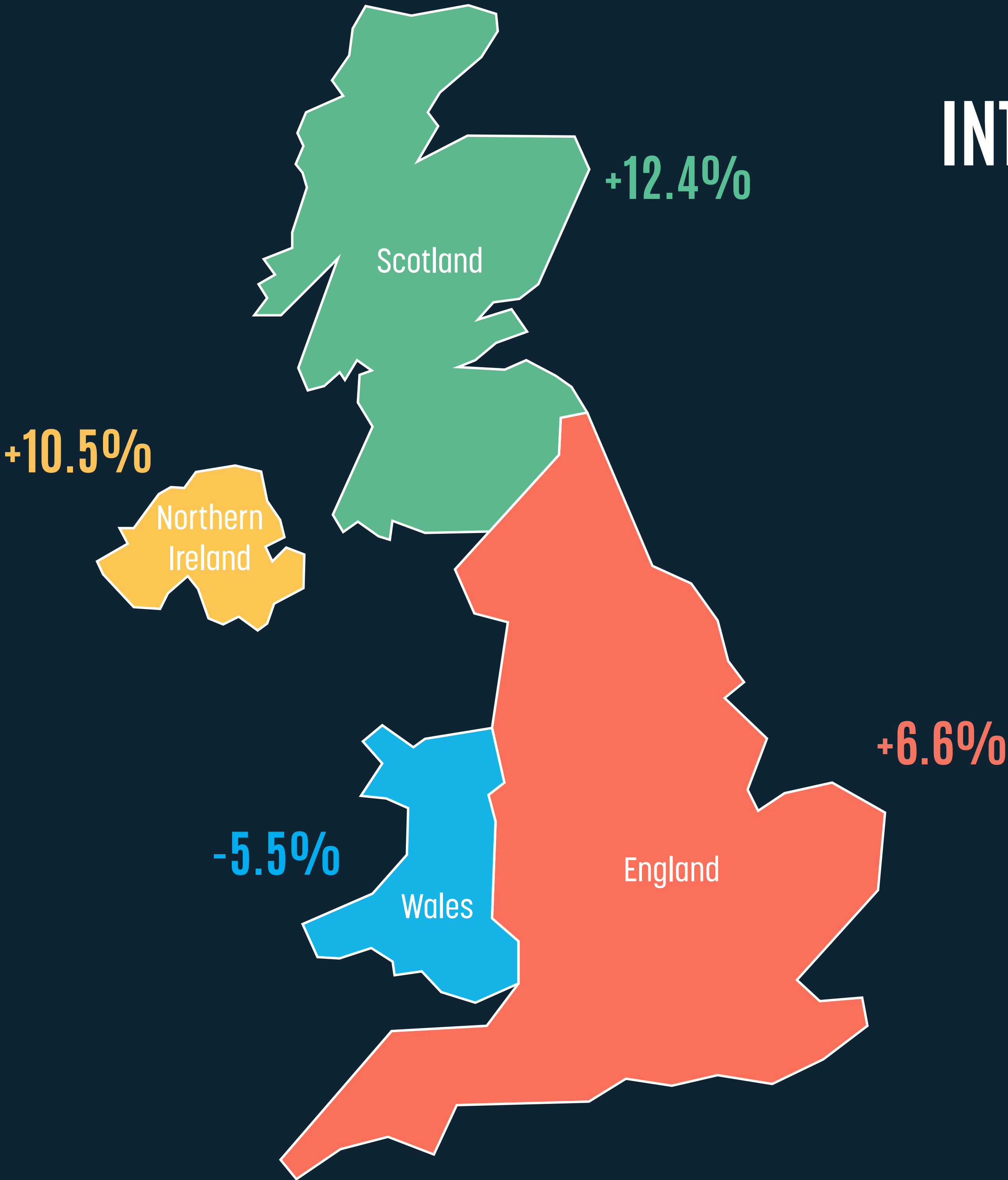


5,300 Accepts
Up 8.0% from 4,910 in 2024

INTERNATIONAL ACCEPTANCES: SUBJECT REVIEW



ACROSS THE FOUR NATIONS



INTERNATIONAL ACCEPTS, COUNTRY OF PROVIDER

ENGLAND +6.6%, +3,990 on 2024	↑
SCOTLAND +12.4%, +730 on 2024	↑
WALES -5.5%, -120 on 2024	↓
NORTHERN IRELAND +10.5%, +160 on 2024	↑

INTERNATIONAL ACCEPTANCES

PROVIDER TARIFF GROUP

HIGHER TARIFF PROVIDERS

International acceptances rose by:

+9.9% (+3,780) to **41,770**

(56% of accepts)



MEDIUM TARIFF PROVIDERS

International acceptances fell by:

-3.8% (-650) to **16,690**

(22% of accepts)



LOWER TARIFF PROVIDERS

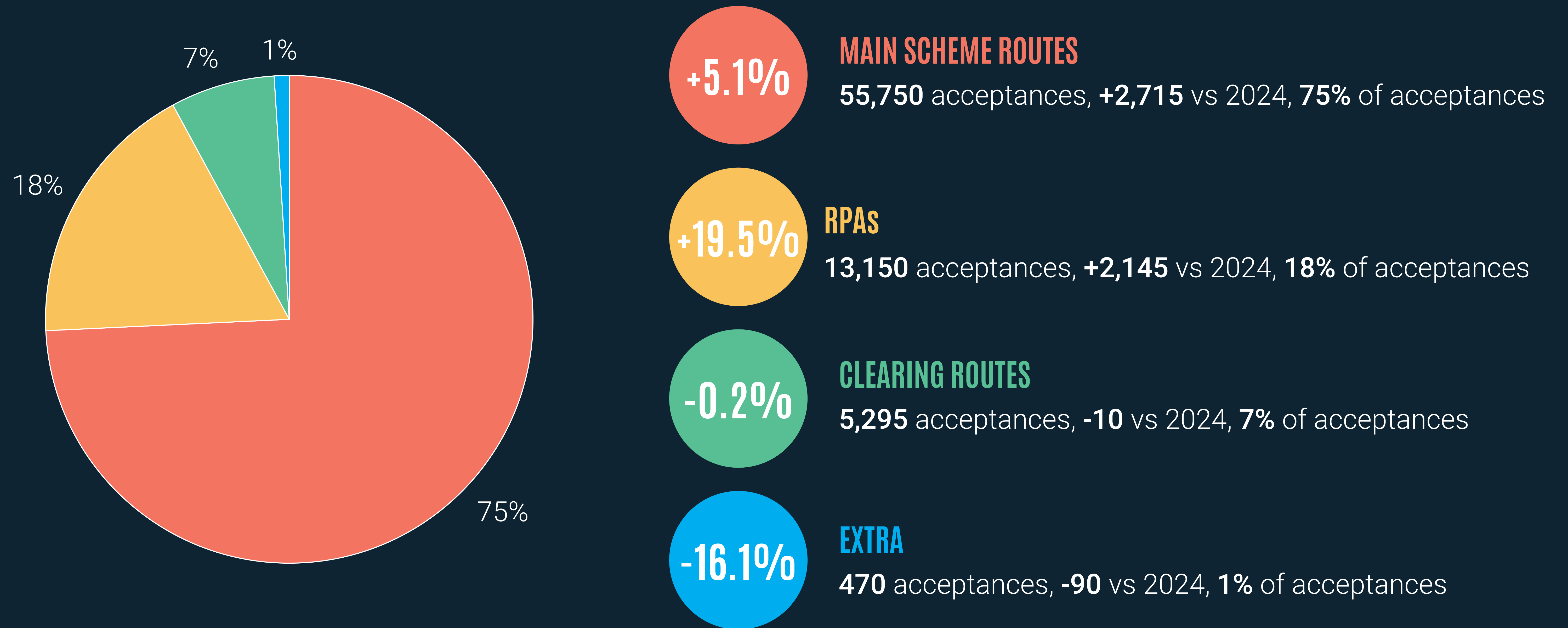
International acceptances rose by:

+11.2% (+1,630) to **16,200**

(22% of accepts)



INTERNATIONAL ACCEPTANCES BY PATHWAYS



LOOKING AHEAD

- 2026 Cycle
- October Deadline
- January Equal Consideration Date
- International Conference: 16-18 June
- Deep dive into your data with Felicity

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PROJECT NEXT GENERATION

INTERNATIONAL STUDENTS: EARLY DRIVERS AND STUDY PATHWAYS



QUESTIONS

