

UPDATE INTERNATIONAL APPLICATIONS – May 2025

This first update on international applications¹ for academic year 2025-2026 includes Bachelor's and Master's application numbers on reference date 5 May. **A first prognosis of final enrolment will be included from the June updates.** Please share any comments or questions with Paul Steeman (p.steeman@vu.nl), adviser at the International Mobility department (IM-SOZ).

CURRENT INTERNATIONAL RECRUITMENT STRATEGY

For academic year 2025-2026, besides activities that are not restricted by self-regulation, focus has been on the following activities:

- (1) Active recruitment for shortage sector programmes at education fairs has been resumed. Online marketing campaigns are targeted to reach prospective students in the countries where fairs took place.
- (2) Increasing VU's international visibility will be achieved through a thematic campaign approach in collaboration with faculties and corporate/VU brand thematic campaign strategies.
- (3) Improving student journey conversion through automated email campaigns, removing conversion blockers, and engaging onboarding activities for optimal preparation and an early sense of belonging.

The range of influence for the upcoming weeks and months shift to strategies that help convert potential students from the initial admission phase to actual enrolment. A new and integrated recruitment plan for 2026-2027 is in development together with C&M.

MOST IMPORTANT APPLICATION INSIGHTS

Complete² Bachelor's applications are down by 16% (3953 > 3316).

- * All faculties show a decline in applications.
- * Non-EEA Bachelor applications are down by 13% (1467 > 1269), EEA applications are down by 18% (2486 > 2047). Currently, of the 3,316 submitted application files, 38% are from non-EEA students, compared to 37% last year.
- * Excluding the numerus fixus programmes shows a 18% drop in complete applications for the other Bachelor programmes. Typically, ~89% of complete applications (non-fixus) are received at this time in the year. The numerus fixus programmes show an 11% drop in applications (BSc Biomedical Sciences -9%, BSc Computer Science -14%, BSc Psychology -10%).
- * The overall admission rate is slightly lower (89% > 85%). This could indicate that a smaller number of students with a complete application meet the admission criteria. The current admission process is however still in full swing.
- * 82% of EEA-students and 90% of non-EEA students are admissible. In 2024, 96% of EEA-students and 93% of non-EEA students were ultimately admitted. Due to Bachelor's admission laws, rejections are rare, hence the high admission rates.
- * Most countries show declining application numbers. Applications are increasing from the USA (+15%), and the Netherlands (+6%) (international degrees obtained at IB-schools).
- * Effects of the increased institutional tuition fees are not visible in current application numbers, there are similar drops for EEA and non-EEA students, but potentially will become apparent in conversion to enrolment.

Complete² Master's applications are down by 10% (3402 > 3065) but show a 1% increase when excluding Chinese applications.

- * BETA, FGW, FSW, RCH, SBE and GNK show a decline in applications. FGB and FRT have received more applications compared to the same date last year.
- * Non-EEA Master applications are down by 14% (2389 > 2050), EEA applications are almost exactly the same (1013 > 1015). Currently, of the 3065 submitted application files, 67% are from non-EEA students, compared to 70% last year. Around 96% of non-EEA applications, and 61% of EEA applications are typically submitted at this time in the application year.
- * The overall admission rate has increased (61% > 67%), which could be an indication of higher application quality (i.e. whether we are attracting the right target group). The current admission process is still in full swing.
- * 67% of EEA-students and 66% of non-EEA students are admissible. In 2024, 71% of EEA-students and 64% of non-EEA students were ultimately admitted. At this stage in the application year, it is difficult to draw conclusions on application quality for these two subgroups since the difference compared to last year is small.
- * Important factor in the non-EEA decline is a 52% drop in applications from China. Excluding China shows a 1% increase from other non-EEA countries, and a 1% increase overall. Most notably, applications are increasing from Vietnam (+31%), Greece (+25%), Italy (+10%), USA (+10%), Türkiye (+5%) and India (+4%). Marketing campaigns are specifically targeted to these countries.
- * VUFP scholarship applications have increased by 9% (411 > 446). Due to increased institutional fees, it is expected that only around 30 scholarships will be granted, compared to around 45 in recent years.
- * Effects of increased institutional tuition fees are not visible in current application numbers, but potentially will become apparent in conversion to enrolment. Furthermore, growing scholarship application numbers could be an indication that non-EEA applicants are increasingly reliant on a scholarship to fund their studies.

¹ International students are defined as 'students seeking admission to an English taught full-time programme on the basis of a non-Dutch degree' (IB-diploma obtained in the Netherlands included). All figures relate to first year, VU-first, September enrolment.

² All application documents submitted and approved, as well as the €100 application fee paid.

BACHELOR'S APPLICATIONS AND CONVERSION RATES

Figure 1 shows an overview of the current number of completed Bachelor's applications. Currently, Bachelor's applications are 16% lower than in 2024. The application deadline for international applications expired on 1 May. Last year, 92% of Bachelor's application files were submitted by 5 May (96% non-EEA, 89% EEA).

INTERNATIONAL BACHELOR APPLICATIONS

Second phase - complete application files

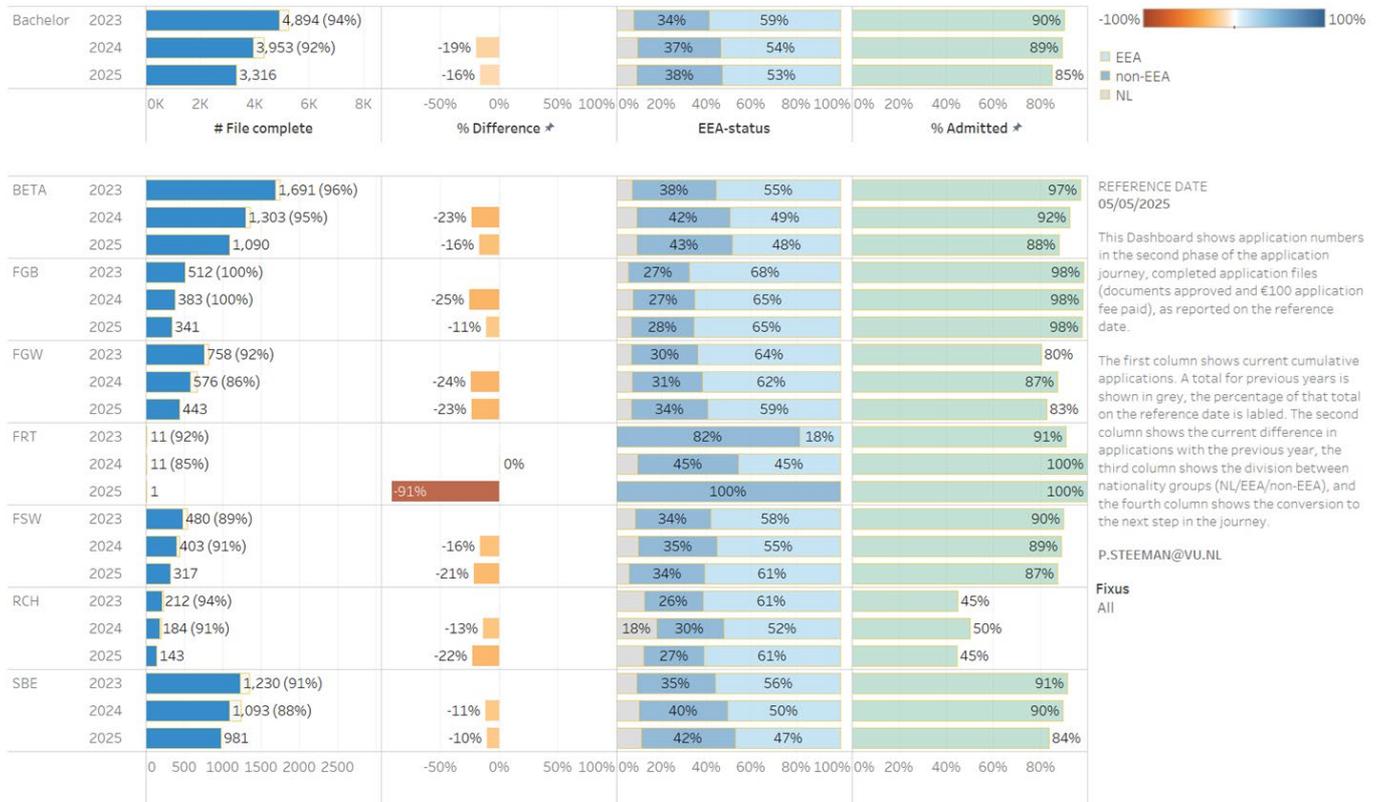


Figure 1. Current Bachelor applications.

Figure 2 below shows the historic conversion rates from completed applications to admission to enrolment Bachelor's students. In 2024, an average of 93% of the non-EEA applications were eligible for admission, while 17% of the admitted students ultimately enrolled, slightly lower than 20% in 2023, and 22% in 2022. Conversion numbers for EEA students are generally higher. Laws regarding Bachelor's admissions make it unlikely students are rejected. Instead, many Bachelor's students need to take one or more deficiency exams to be unconditionally admitted. This makes admission rates generally high, and enrolments rates generally low.

CONVERSION APPLICATIONS > ADMISSION > ENROLMENT

Application numbers with corresponding conversion rates

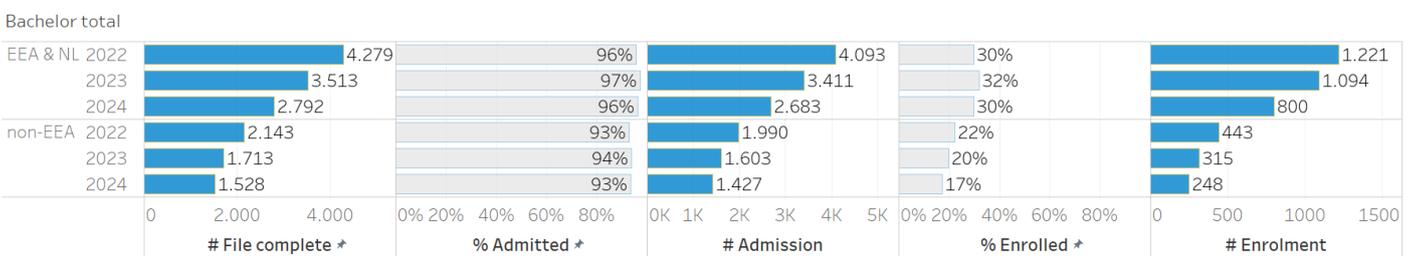


Figure 2. Historic conversion from application to admission to enrolment for Bachelor enrolment.

Conversion data emphasizes the need for targeted strategies to optimize conversion. IM is working with C&M and faculties on optimisation of the conversion from admission to enrolment (both Bachelor and Master). For the conversion from application to admission, key influencing factors include clear admission requirements, and an information strategy designed to attract and retain qualified candidates. For the conversion from admission to enrolment, fostering a sense of belonging through early engagement

activities and providing comprehensive onboarding support, including academic guidance and practical assistance, play crucial roles in ensuring an optimal student journey.

BACHELOR'S APPLICATION DIVERSITY

Most countries show declining Bachelor's application numbers. Applications are increasing from the USA (+15%), and the Netherlands (+6%) (international degrees obtained at IB-schools).

Similar to Master's applications, there is a 43% drop in Chinese Bachelor's applications. However, Chinese students generally make up a smaller share of total applications at the Bachelor's level, so the impact on overall applications is less visible. Excluding Chinese applications shows a drop in total Bachelor's application of 15%.

INTERNATIONAL DIVERSITY

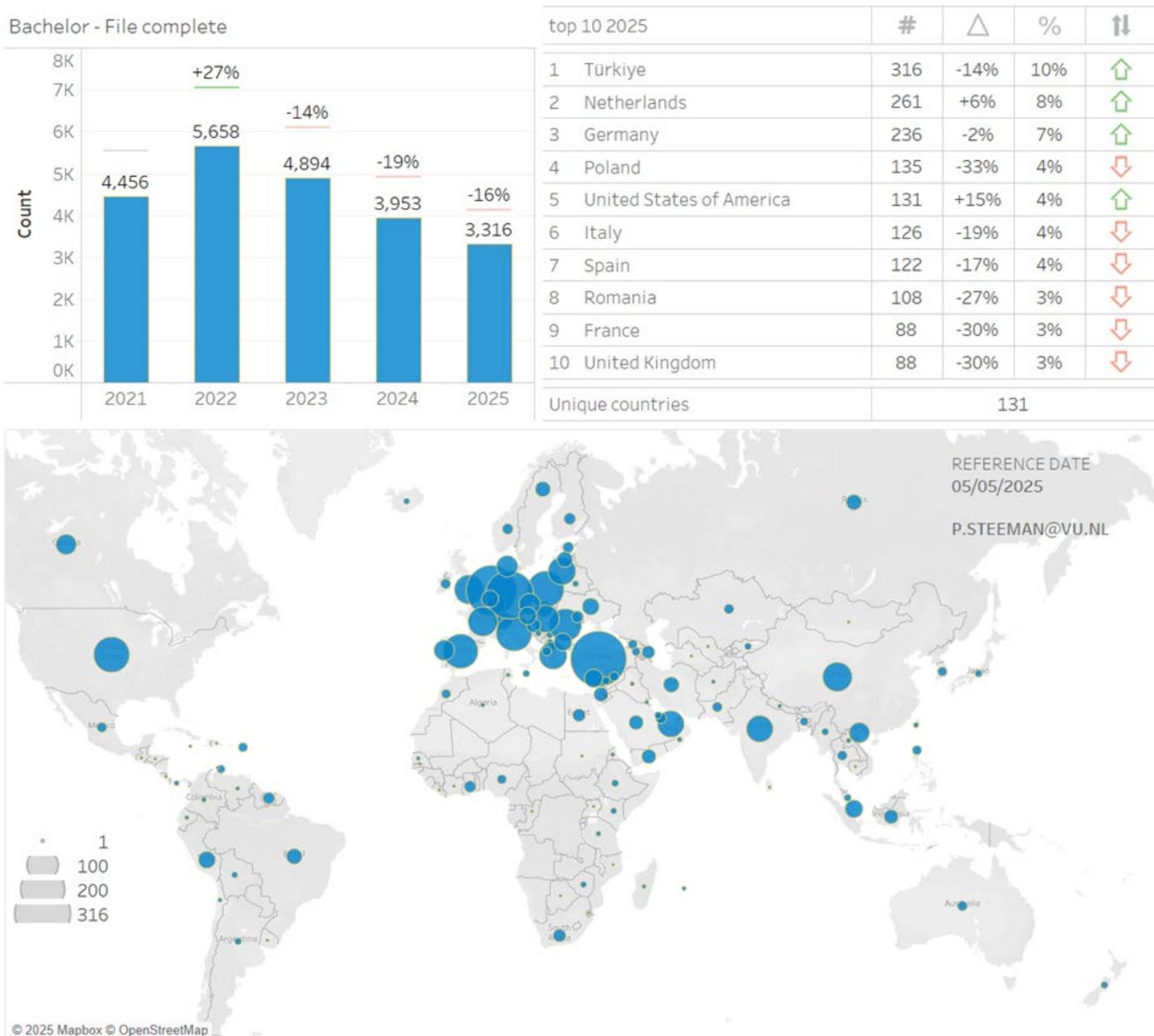


Figure 3. Geographic distribution of Bachelor applications.

MASTER'S APPLICATIONS AND CONVERSION RATES

Figure 4 shows an overview of the current number of completed Master's applications. Currently, Master's applications are 10% lower than in 2024. Last year, 82% of Master's application files were submitted by 5 May (96% non-EEA, 61% EEA).

The deadline to apply for the VUFP scholarship expired on 1 February. VUFP is a scholarship for non-EEA Master students, covering tuition fees, and is a key instrument to promote financial accessibility and academic excellence VUFP scholarship applications have increased by 9% (411 > 446). The number of available scholarships this year will be much lower than previous years, since its budget stayed the same, while average institutional fees increased over 35%.

INTERNATIONAL MASTER APPLICATIONS

Second phase - complete application files

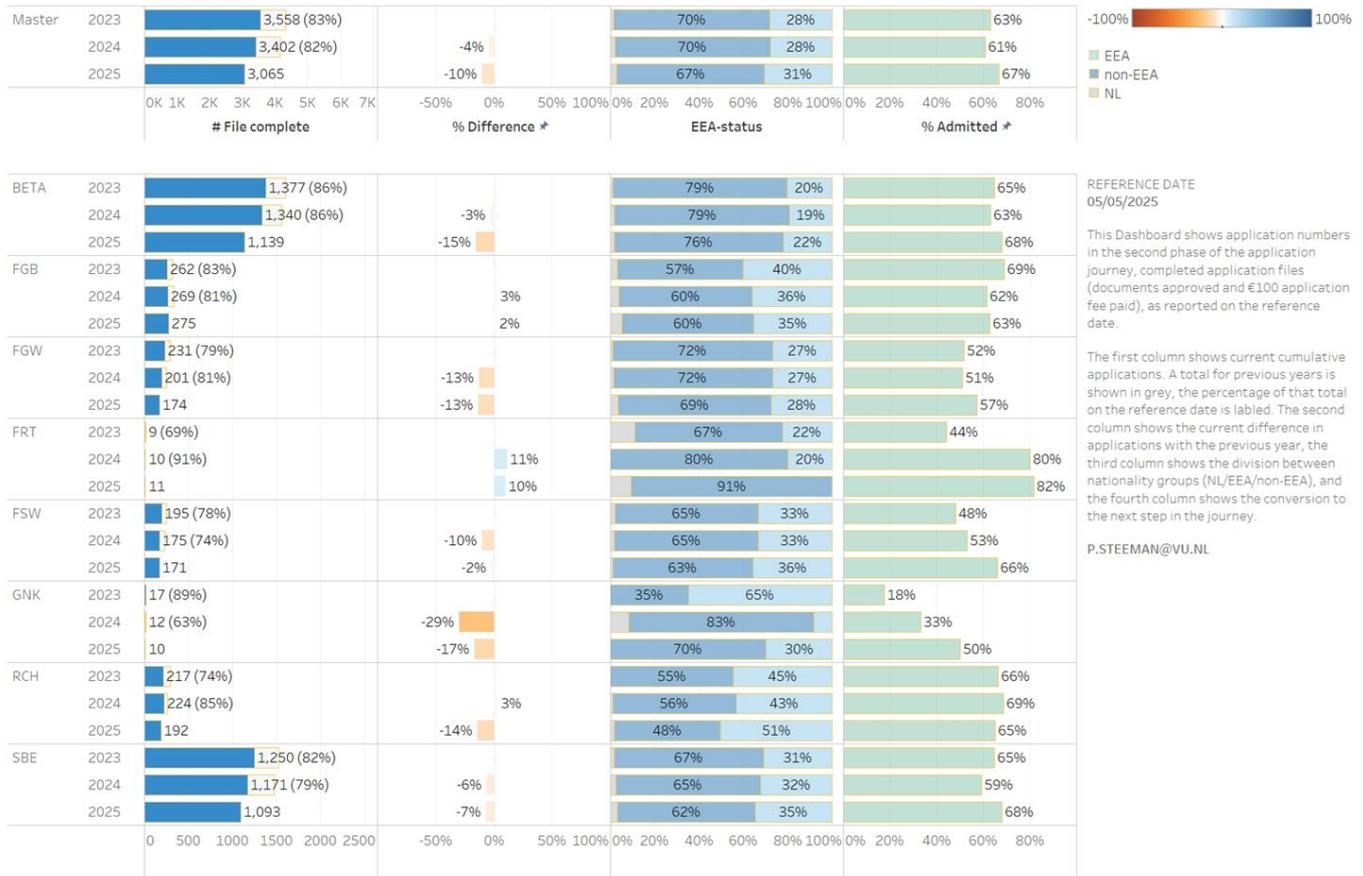


Figure 4. Current Master applications.

Figure 5 below shows the historic conversion rates from completed applications to admission to enrolment Master students. In 2024, an average of 64% of the non-EEA applications were eligible for admission, while 30% of the admitted students ultimately enrolled, slightly lower than 32% in 2023, and 33% in 2022. Conversion numbers for EEA students are generally higher.

CONVERSION APPLICATIONS > ADMISSION > ENROLMENT

Application numbers with corresponding conversion rates

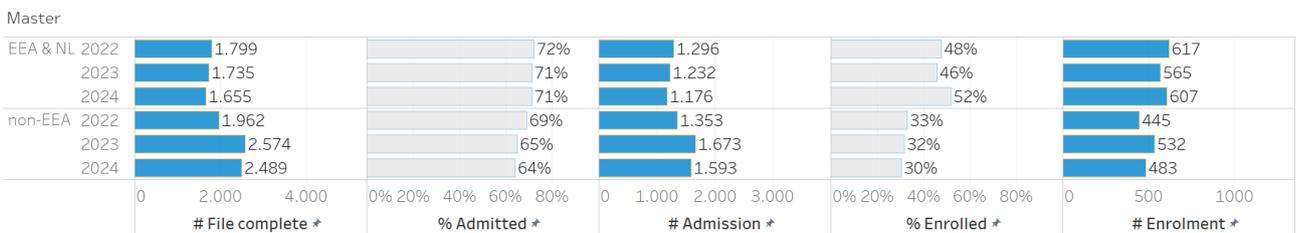


Figure 5. Historic conversion from application to admission to enrolment for Master enrolment.

Conversion data emphasizes the need for targeted strategies to optimize conversion. IM is working with C&M and faculties on optimisation of the conversion from admission to enrolment (both Bachelor and Master). For the conversion from application to admission, key influencing factors include clear admission requirements, and an information strategy designed to attract and retain qualified candidates. For the conversion from admission to enrolment, fostering a sense of belonging through early engagement activities and providing comprehensive onboarding support, including academic guidance and practical assistance, play crucial roles in ensuring an optimal student journey.

MASTER'S APPLICATION DIVERSITY

Most notably, applications are increasing from Vietnam (+31%), Greece (+25%), Italy (+10%), USA (+10%), Türkiye (+5%) and India (+4%), countries VU is actively targeting in its marketing efforts. While Chinese applications have decreased significantly by ~52%, they still represent the largest share (11%) of total Master applications. This is the second year in a row that Chinese applications have been dropping significantly.

There are several factors that potentially influence the drop in Chinese application numbers, which is a trend seen at other Dutch universities as well. Specifically, to promote diversity and quality, VU ended cooperation with its Chinese representative office last year which was responsible for local marketing activities, and functioned as a commission-based agent. Secondly, in recent years, socio-economic factors have attributed to high unemployment rates (~20%) among Chinese youth. Thirdly, the Chinese government has implemented policies to increase domestic enrolment, as well as improve ranking positions of its institutions. Finally, geopolitical and diplomatic developments have changed the dynamics in outbound Chinese student mobility following the pandemic.^{3 4}

INTERNATIONAL DIVERSITY

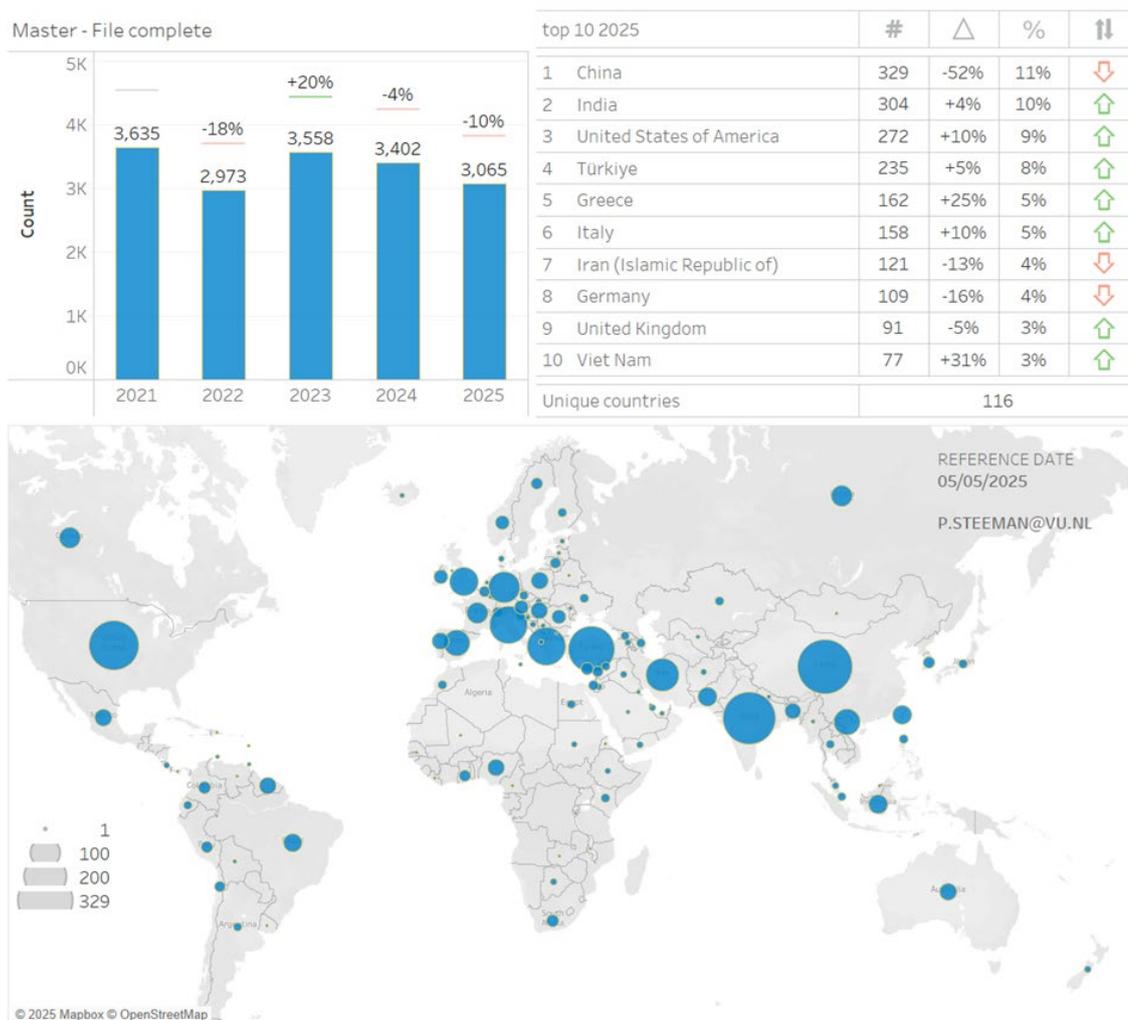


Figure 6. Geographic distribution of Master applications.

³ Economist Intelligence Update: The Changing Picture of China's Outbound Study { <https://www.eiu.com/n/in-charts-the-changing-picture-of-chinas-outbound-study/> }

⁴ ICEF Monitor { <https://monitor.icef.com/2025/03/report-projects-need-for-greater-diversification-in-international-student-recruitment-this-year/> }

MARKETING, RECRUITMENT AND CONVERSION EFFORTS

Website traffic is a good indicator of expected applications in the long run. When comparing the active user traffic to VU's English education webpages from outside the Netherlands, we are seeing an increase for a couple of months since mid-February 2025. For Bachelor's pages on average 1% increase, and for Master's around 10% increase. This is mainly due to the reactivation of corporate brand campaigns and promotions of the programmes in the labour shortage sector list. These results cannot be linked to current lead generation and Studielink applications.

C&M tracks website traffic and works on optimising our online profile through metrics like active users, new users, and visitor engagement rates. Strategic marketing campaigns are run to encourage active website visits, and partnerships with online study platforms (portals) are being strengthened. The central lead management project focuses on nurturing visitors to apply in Studielink.



Figure 7. Active users from outside the Netherlands on international pages of the VU website, compared with same period last year (October to May). Top view Bachelor, lower view Master.

To improve the conversion of applicants in Studielink to admitted students, several initiatives have been implemented. These include ongoing enhancements to email campaigns and a request for faculties to organise welcome sessions for their admitted students, supported by both Communication & Marketing and International Mobility.

In the coming months, the focus will shift toward strategies aimed at converting potential students from the initial admission phase to actual enrolment - particularly non-EEA students, who tend to have lower enrollment rates compared to EEA students. This will be done in close cooperation with, and supported by, the individual programmes and C&M.

Over the coming months, the Onboarding team within International Mobility will host several pre-departure sessions. These will focus not only on practical matters important to admitted international students, but also on fostering a sense of belonging. As part of this last effort, we aim to connect students with their fellow students through initiatives such as the Goin' app, which launched on May 1st.