

UPDATE INTERNATIONAL APPLICATIONS AND EXPECTED ENROLMENT – July 2025

This update on international applications¹ for academic year 2025-2026 includes Bachelor's and Master's application numbers on reference date 16 July. Please share any comments or questions with Paul Steeman (p.steeman@vu.nl), adviser at the International Mobility department (IM-SOZ).

MOST IMPORTANT APPLICATION INSIGHTS

Application numbers and expected enrolment are very similar to the previous updates. Close to 100% of international applications are received at this time in the academic year. A prognosis based on historic conversion to admission and enrolment can therefore be made. Overall, a decline of 9-18% (from 2138 to 1750-1950) total international enrolment is expected. Throughout the summer, recruitment activities are mainly focused at boosting conversion from admission to enrolment. Increased institutional fees are expected to be a factor in potentially lower non-EEA conversion rates.

Based on current application and admission numbers, a decline of 15-20% international Bachelor enrolment is expected (from 1048 to 820-890). Non-EEA enrolment is expected to drop by 15-25% (from 248 to 180-210). EEA enrolment is expected to drop by 15-20% (from 800 to 640-680).

- * Complete² Bachelor's applications are down by 15% (4263 > 3607), while total admissions are down by 16%.
- * All faculties show a decline in applications.
- * Non-EEA Bachelor applications are down by 16% (1513 > 1278), EEA applications are down by 15% (2750 > 2329). Currently, of the 3607 submitted application files, 35% are from non-EEA students, compared to 35% last year also.
- * Excluding the numerus fixus programmes shows a 16% drop in complete applications for the other Bachelor programmes. Typically, ~100% 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%).
- * Most countries show declining application numbers. Applications are increasing from the USA (+7%), and the Netherlands (+8%) (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.

Based on current application and admission numbers, a decline of 3-15% international Master enrolment is expected (from 1090 to 930-1060). Non-EEA enrolment is expected to drop by 10-25% (from 483 to 360-435). EEA enrolment is expected to be between +5% and -5% (from 607 to 570-625).

- * Complete² Master's applications are down by 10% (4124 > 3728). There is a smaller decrease (-1%) when excluding China. Total admissions are down by 4%.
- * BETA, FGW, RCH, and SBE show a decline in applications. FGB, FRT, FSW and GNK have received more applications compared to the same date last year.
- * Non-EEA Master applications are down by 15% (2482 > 2107), EEA applications are down by 1% (1642 > 1621). Currently, of the 3728 submitted application files, 57% are from non-EEA students, compared to 60% last year. Around 100% of applications are typically submitted at this time in the application year.
- * Important factor in the non-EEA decline is a 52% drop in applications from China. Excluding China shows a 2% increase from other non-EEA countries, and a 1% decrease overall. Most notably, applications are increasing from Greece (+12%), India (+6%), Italy (+9%), Poland (+62%), Spain (+8%), Türkiye (+7%), UK (+1%), USA (+7%), and Vietnam (+27%). Marketing campaigns are specifically targeted towards 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.

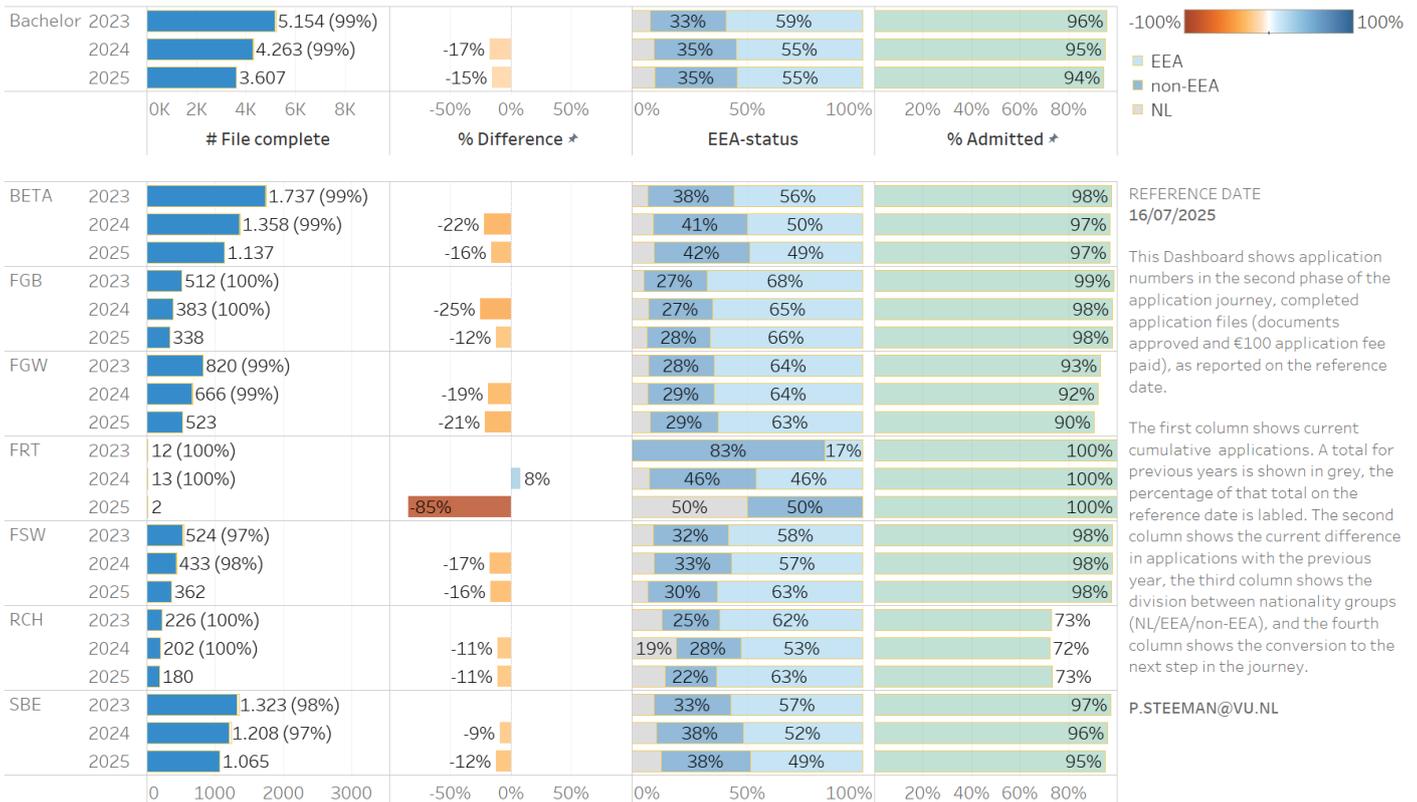
BACHELOR'S APPLICATIONS

Figure 1 shows an overview of the current number of completed Bachelor's applications. Currently, Bachelor's applications are 15% lower than in 2024. The application deadline for international applications expired on 1 May. Last year, 99% of Bachelor's application files were submitted by 16 July.

Based on current application and admission numbers, a decline of 15-20% international Bachelor enrolment is expected (from 1048 to 820-890). Non-EEA enrolment is expected to drop by 15-25% (from 248 to 180-210). EEA enrolment is expected to drop by 15-20% (from 800 to 640-680).

INTERNATIONAL BACHELOR APPLICATIONS

Second phase - complete application files



REFERENCE DATE
16/07/2025

This Dashboard shows application numbers in the second phase of the application journey, completed application files (documents approved and €100 application fee paid), as reported on the reference date.

The first column shows current cumulative applications. A total for previous years is shown in grey, the percentage of that total on the reference date is labeled. The second column shows the current difference in applications with the previous year, the third column shows the division between nationality groups (NL/EEA/non-EEA), and the fourth column shows the conversion to the next step in the journey.

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Figure 1. Current Bachelor applications.

CONVERSION RATES

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

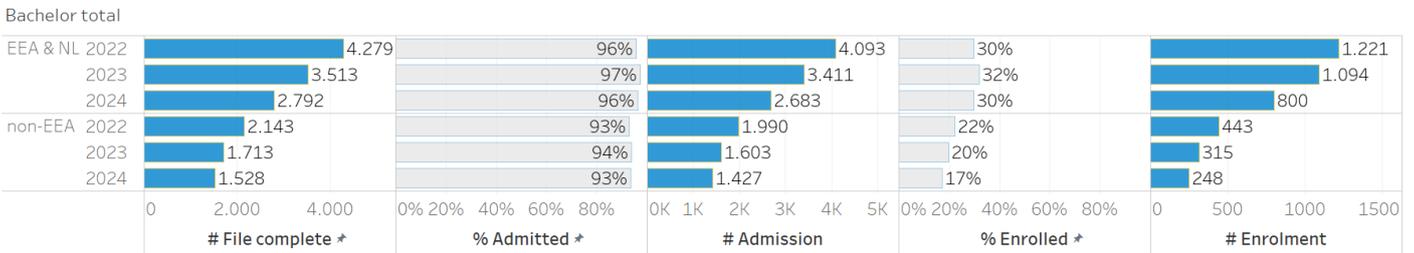


Figure 2. Historic conversion from application to admission to enrolment for Bachelor enrolment.

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.

Figure 3 shows current conversion from admission to enrolment. Tracking this year’s conversion and comparing it with last year’s helps to determine whether application and admission numbers will translate into final enrolment or if the prognosis needs to be adjusted. For 2025, effects of increased institutional tuition fees are not visible in current application numbers, but potentially will become apparent in conversion to enrolment.

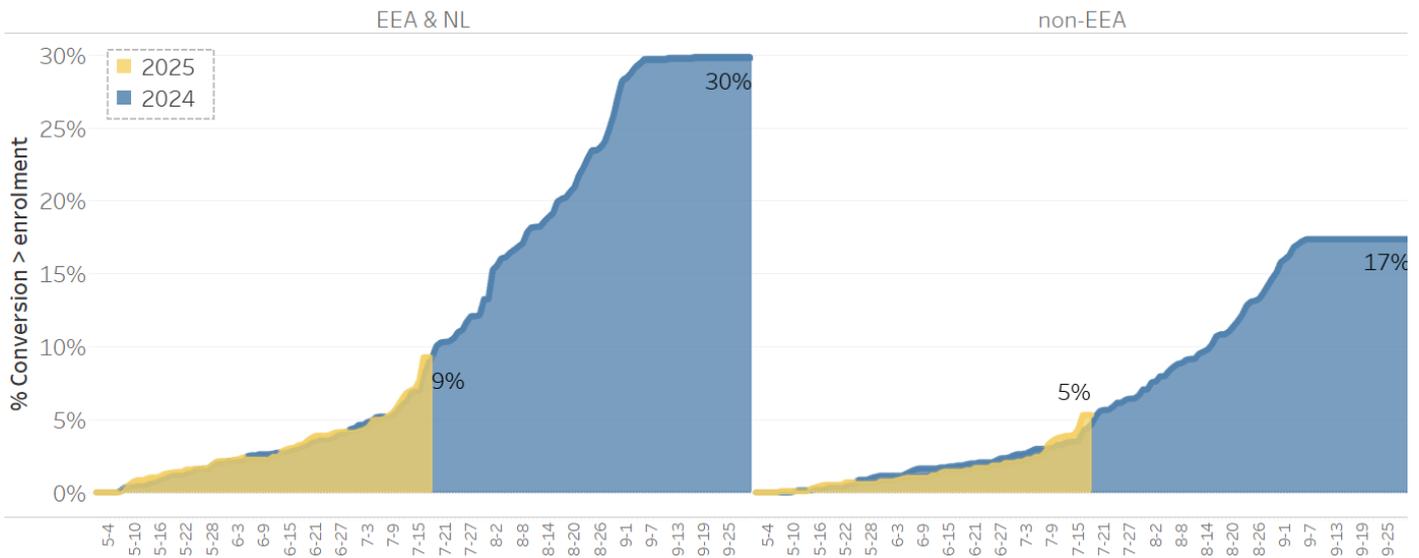


Figure 3. Running conversion of total admission to enrolment. Data starts in May when students are able to complete their enrolment, until the end of September when enrolment closes.

BACHELOR'S APPLICATION DIVERSITY

Most countries show declining Bachelor's application numbers. Applications are increasing from the USA (+7%), and the Netherlands (+8%) (international degrees obtained at IB-schools).

Similar to significant drop in Master's applications (-52%), there is also 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 applications of 14%.

INTERNATIONAL DIVERSITY

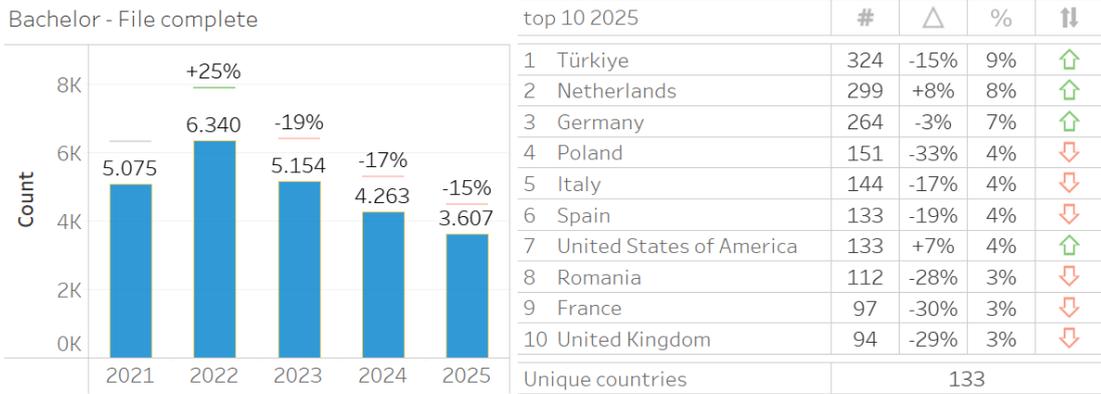


Figure 4. Geographic distribution of Bachelor applications.

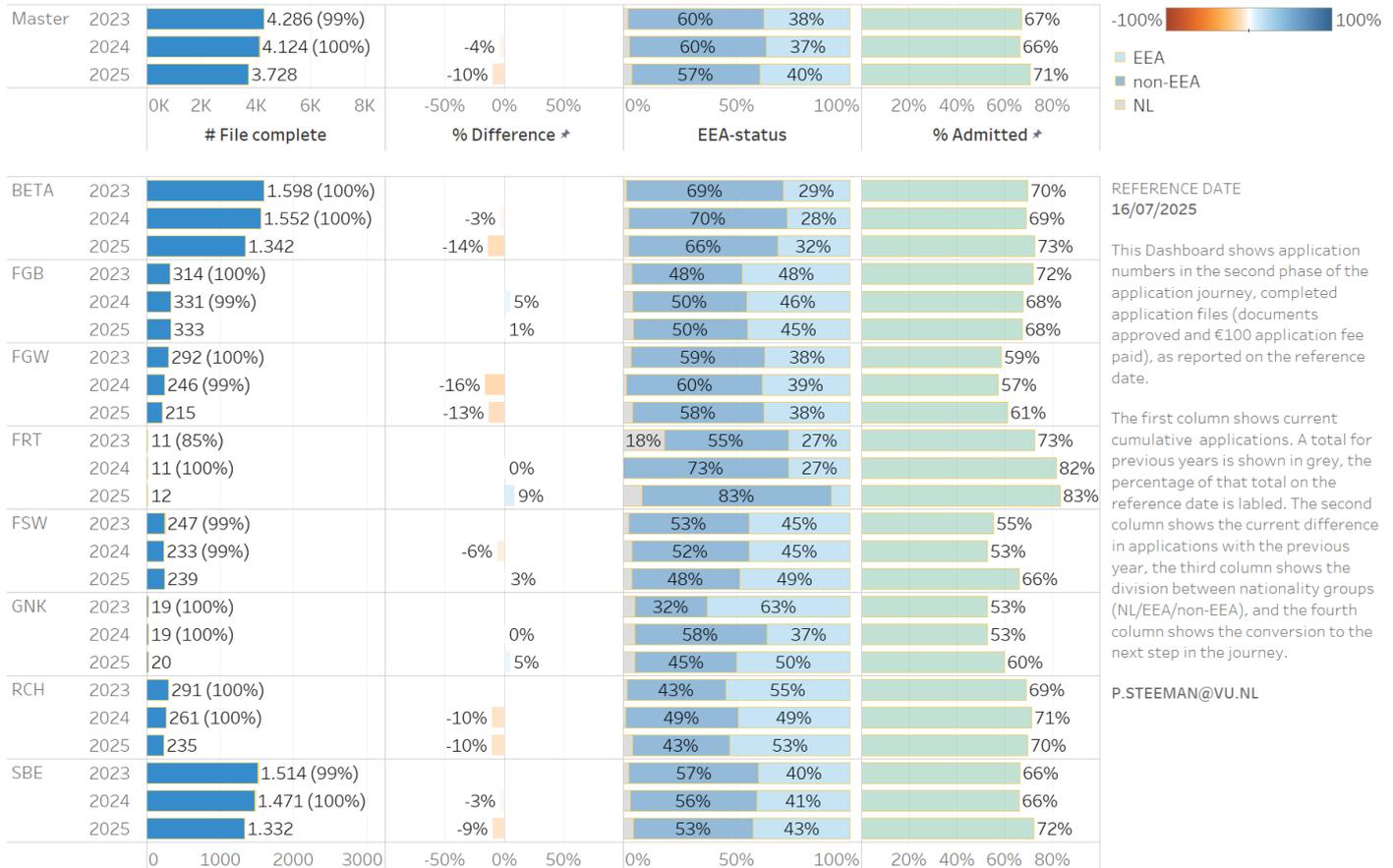
MASTER'S APPLICATIONS AND CONVERSION RATES

Figure 5 shows an overview of the current number of completed Master's applications. Currently, Master's applications are 10% lower than in 2024. Last year, 100% of Master's application files were submitted by 16 July.

Based on current application and admission numbers, a decline of 3-15% international Master enrolment is expected (from 1090 to 930-1060). Non-EEA enrolment is expected to drop by 10-25% (from 483 to 360-430). EEA enrolment is expected to be between +5% and -5% (from 607 to 570-630).

INTERNATIONAL MASTER APPLICATIONS

Second phase - complete application files



REFERENCE DATE
16/07/2025

This Dashboard shows application numbers in the second phase of the application journey, completed application files (documents approved and €100 application fee paid), as reported on the reference date.

The first column shows current cumulative applications. A total for previous years is shown in grey, the percentage of that total on the reference date is labeled. The second column shows the current difference in applications with the previous year, the third column shows the division between nationality groups (NL/EEA/non-EEA), and the fourth column shows the conversion to the next step in the journey.

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Figure 5. Current Master applications.

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%.

CONVERSION RATES

Figure 6 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

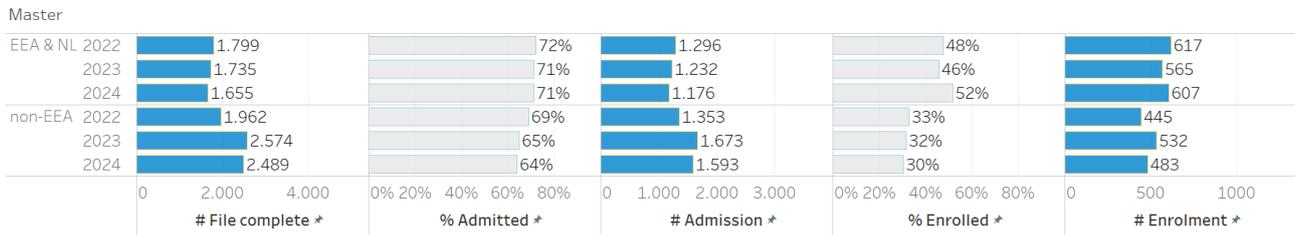


Figure 6. Historic conversion from application to admission to enrolment for Master enrolment.

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.

Figure 7 shows current conversion from admission to enrolment. Tracking this year’s conversion and comparing it with last year’s helps to determine whether application and admission numbers will translate into final enrolment or if the prognosis needs to be adjusted. For 2025, effects of increased institutional tuition fees are not visible in current application numbers, but potentially will become apparent in conversion to enrolment. At this point in time, conversion for non-EEA Master students seems to fall behind last year’s conversion.

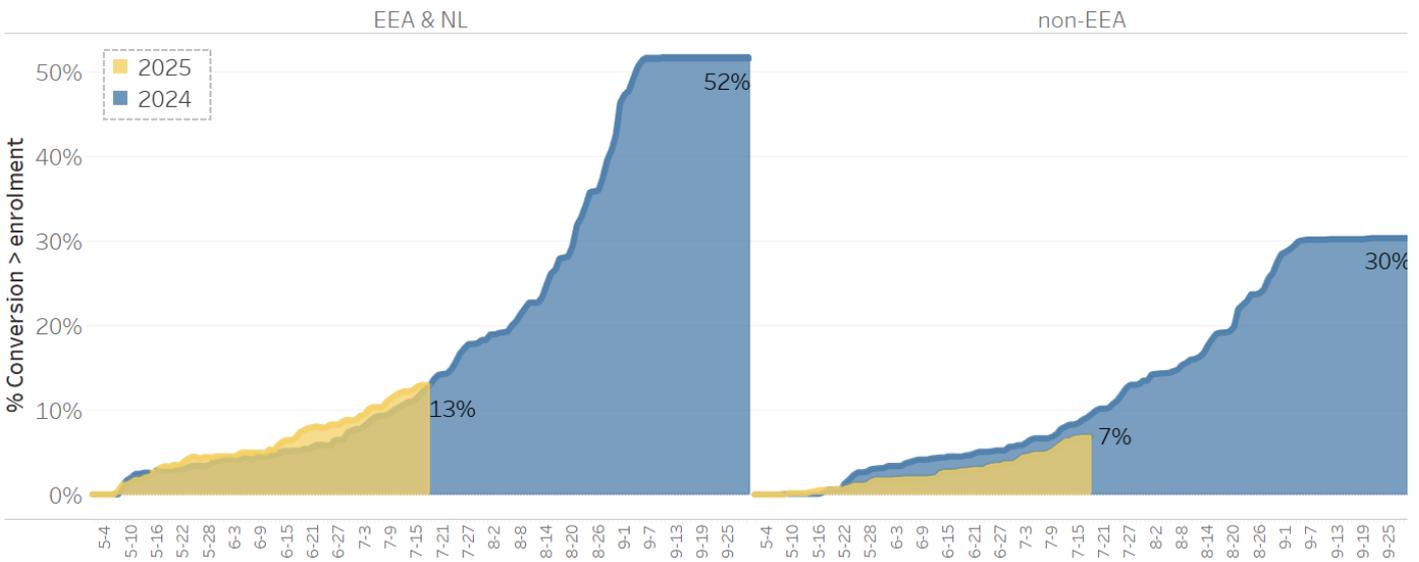


Figure 7. Running conversion of total admission to enrolment. Data starts in May when students are able to complete their enrolment, until the end of September when enrolment closes.

MASTER'S APPLICATION DIVERSITY

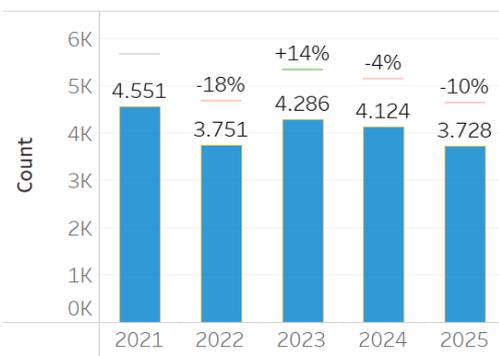
An important factor in the non-EEA decline is a 52% drop in applications from China. Excluding China shows a 2% increase from other non-EEA countries, and a 1% decrease overall. Most notably, applications are increasing from Greece (+12%), India (+6%), Italy (+9%), Poland (+62%), Spain (+8%), Türkiye (+7%), UK (+1%), USA (+7%), and Vietnam (+27%), countries VU is actively targeting in its marketing efforts. While Chinese applications have decreased significantly, they still represent the largest share (9%) 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



Master - File complete



| top 10 2025 | # | △ | % | ↑↓ |
|------------------------------|-----|------|----|----|
| 1 China | 338 | -52% | 9% | ↓ |
| 2 India | 314 | +6% | 8% | ↑ |
| 3 United States of America | 292 | +7% | 8% | ↑ |
| 4 Türkiye | 257 | +7% | 7% | ↑ |
| 5 Italy | 255 | +9% | 7% | ↑ |
| 6 Greece | 235 | +12% | 6% | ↑ |
| 7 Germany | 193 | -17% | 5% | ↓ |
| 8 United Kingdom | 124 | +1% | 3% | ↑ |
| 9 Iran (Islamic Republic of) | 123 | -13% | 3% | ↓ |
| 10 Spain | 111 | +8% | 3% | ↑ |
| Unique countries | 119 | | | |



Figure 8. 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 optimizing 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 9. 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 organize 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.