



Universities UK
International

The scale of UK higher education transnational education 2024–25

Trend analysis and regional highlights

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UK higher education transnational education in 2024–25

This edition of UUKi's *Scale of TNE* report marks the 11th edition of the series, providing an annual snapshot of the current scale of UK higher education (HE) transnational education (TNE). The report explores trends in regional growth, types of provision, and levels of study during the 2024–25 academic year, with insights on the evolution of UK HE TNE across the past five years.

In 2024–25, UK TNE students totalled 699,660, a 7.0% increase from the previous year. 183 providers delivered TNE in 229 countries or territories. There has been significant growth over the past five years, with the number of UK HE TNE students increasing by +36.6% from 512,325 in 2020–21.

The publication of the UK Government's refreshed **International Education Strategy (2026)** places UK TNE at the forefront of the government's agenda in promoting internationalisation and delivering against its ambition to grow education exports to £40 billion per year by 2030.

In 2024–25:



699,660

UK HE TNE students



183

UK HE providers



229

host countries
and territories

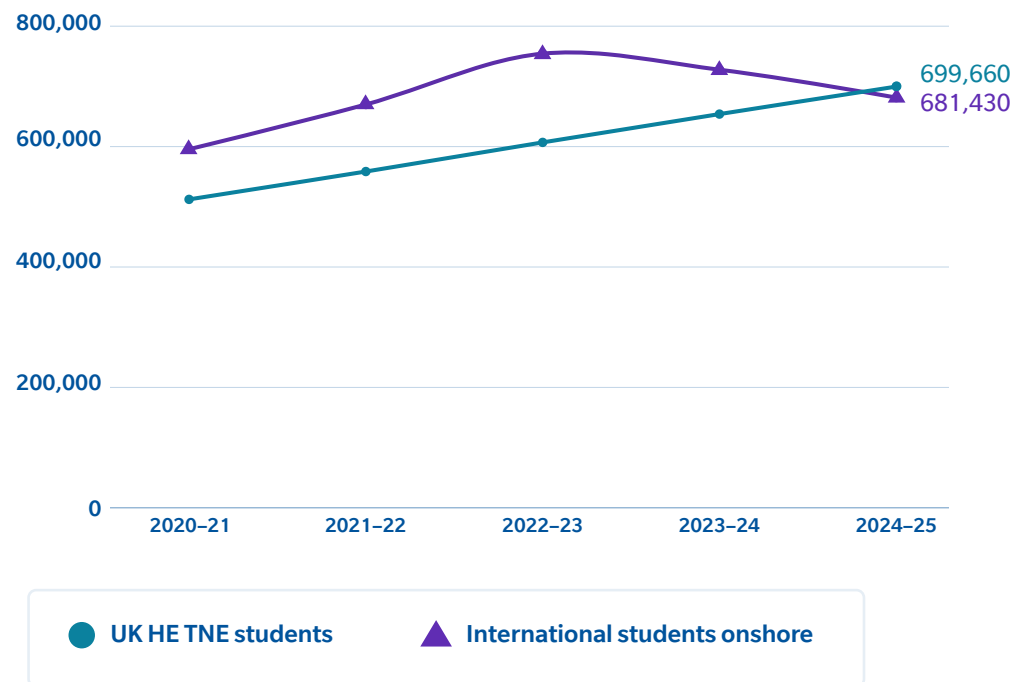
Growth and expansion

The number of UK HE TNE students (699,660) has now exceeded the number of international students studying onshore in the UK (681,430). From 2023–24 to 2024–25, the UK saw a –6.4% decline in onshore international student recruitment numbers, but a +7.0% growth in UK HE TNE students. 71 providers now have more TNE students than they do onshore international students.

Demand for higher education globally is increasing rapidly; the number of students in higher education globally has more than doubled over the past two decades up to 269 million. However, disparities in access to higher education persist, with the global enrolment average being 79.0% in the highest world regions (Europe and Northern America), and just 9.0% in Sub-Saharan Africa. While some students globally will be internationally mobile, most will need access to education in their home country or region. Of the 269+ million HE students, only 7.3 million will leave their home country to access higher education (UNESCO UIS data, 2024).

Over the past year alone, several countries — including China, Indonesia, Mauritius, Pakistan and Vietnam — have introduced measures and reforms to higher education regulations to further welcome TNE, addressing national strategic priorities, supporting capacity building, filling skills gaps, and widening access to education.

FIGURE 1 • TNE VS ONSHORE INTERNATIONAL STUDENTS



71 UK HE TNE providers have more TNE students than onshore international students

Level of study

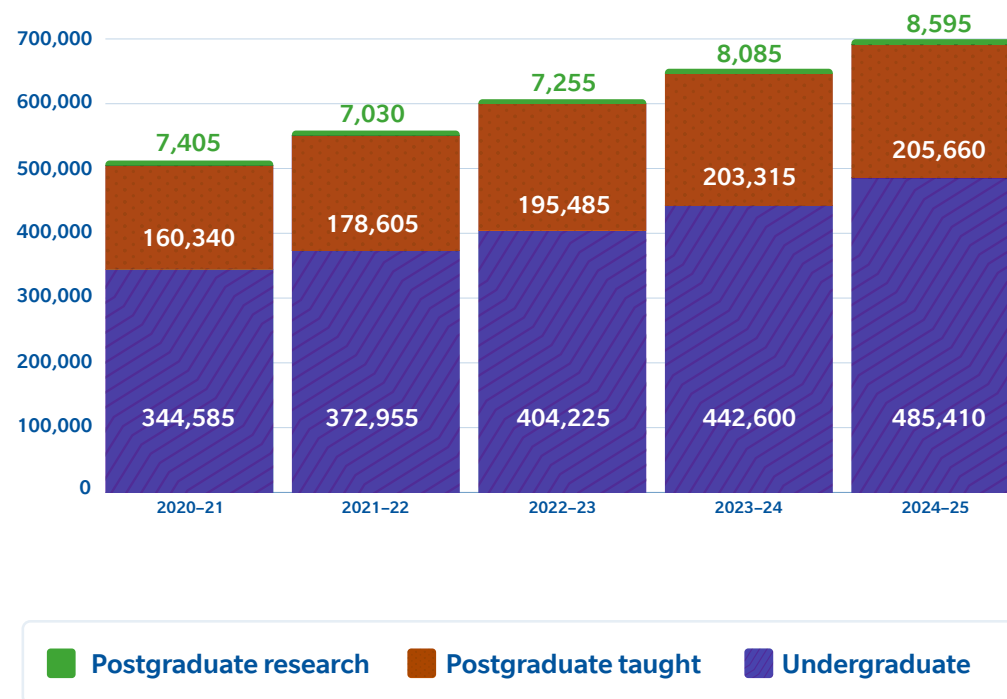
UK providers deliver TNE to significantly higher numbers of undergraduate students than postgraduate students. In 2024–25, across all providers, there were 485,410 undergraduate students. This is more than double the total of 214,255 postgraduate taught (PGT) and postgraduate research (PGR) TNE students combined.

Over the past five years, from 2020–21 to 2024–25, the growth rate of UK TNE students has been +40.9% for undergraduate students, +28.3% for PGT students, and +16.1% for PGR students.

At postgraduate level, the number of PGT TNE students significantly outweighs PGR students. In 2024–25, across all providers, there were 205,660 PGT TNE students, representing a +28.3% increase over the past five years, compared to 8,595 PGR TNE students with a +16.1% increase over the same period.

33 UK institutions were postgraduate-only TNE providers, including SOAS, University of Bath, and Cranfield University. The largest PGT providers were Liverpool John Moores (18,110) and University of East London (12,740), while the largest PGR providers were University of Nottingham (1,375) and University of Liverpool (800).

FIGURE 2 • FIVE-YEAR UK HE TNE HEADCOUNT: LEVEL OF STUDY



Types of provision

In 2024–25, there were 535,880 in-person TNE students, compared with 163,780 distance TNE students. However, there were both more UK HE providers delivering distance TNE (154 institutions) than in-person TNE (133 institutions), and more countries/territories hosting UK TNE via distance provision (228) compared with in-person provision (202). In 2024–25, the majority of UK TNE students were studying via partnership provision (489,495 or 70.0% of the total). The remaining students were studying via either distance learning (163,780 or 23.4%) or at an overseas campus (46,385 or 6.6%).

Over the past five years since 2020–21, the most significant growth has been in partnership provision (+51.4% increase in student numbers), followed by overseas campus provision (+30.3% increase), and distance learning (+6.8% increase).

In 2024–25, 154 UK HE providers delivered TNE via distance learning, 128 via partnership provision, and 29 delivered TNE at an overseas campus.

FIGURE 3 • FIVE-YEAR UK HE TNE HEADCOUNT: DELIVERY MODE

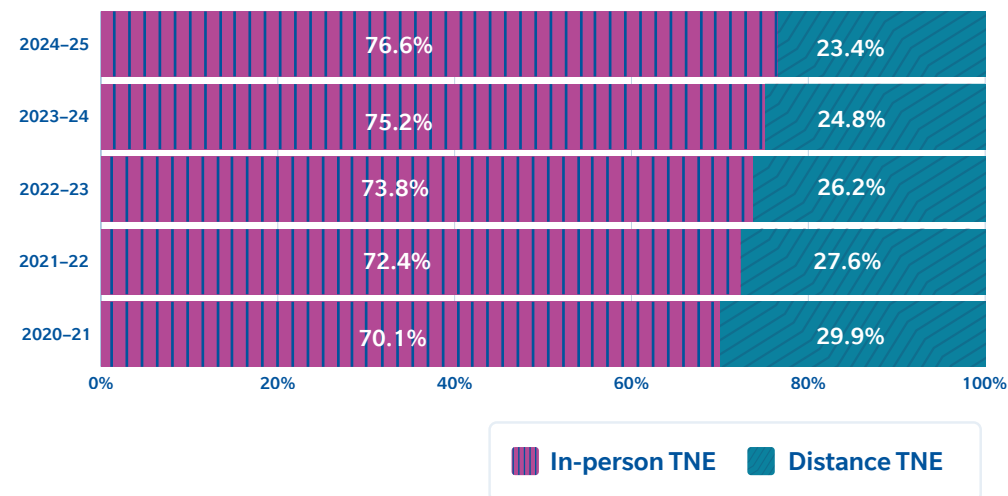
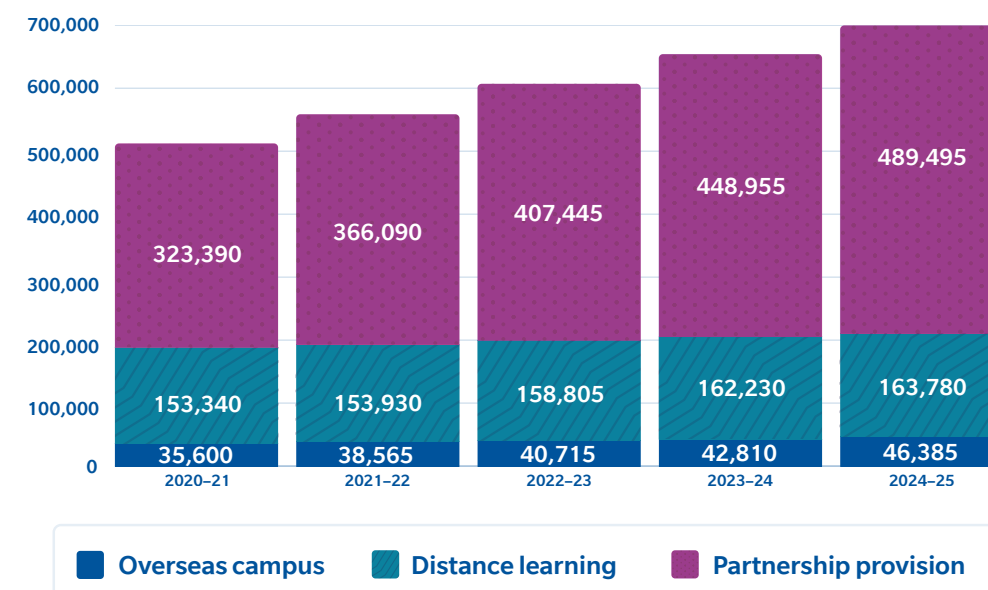


FIGURE 4 • FIVE-YEAR UK HE TNE HEADCOUNT: TYPE OF PROVISION



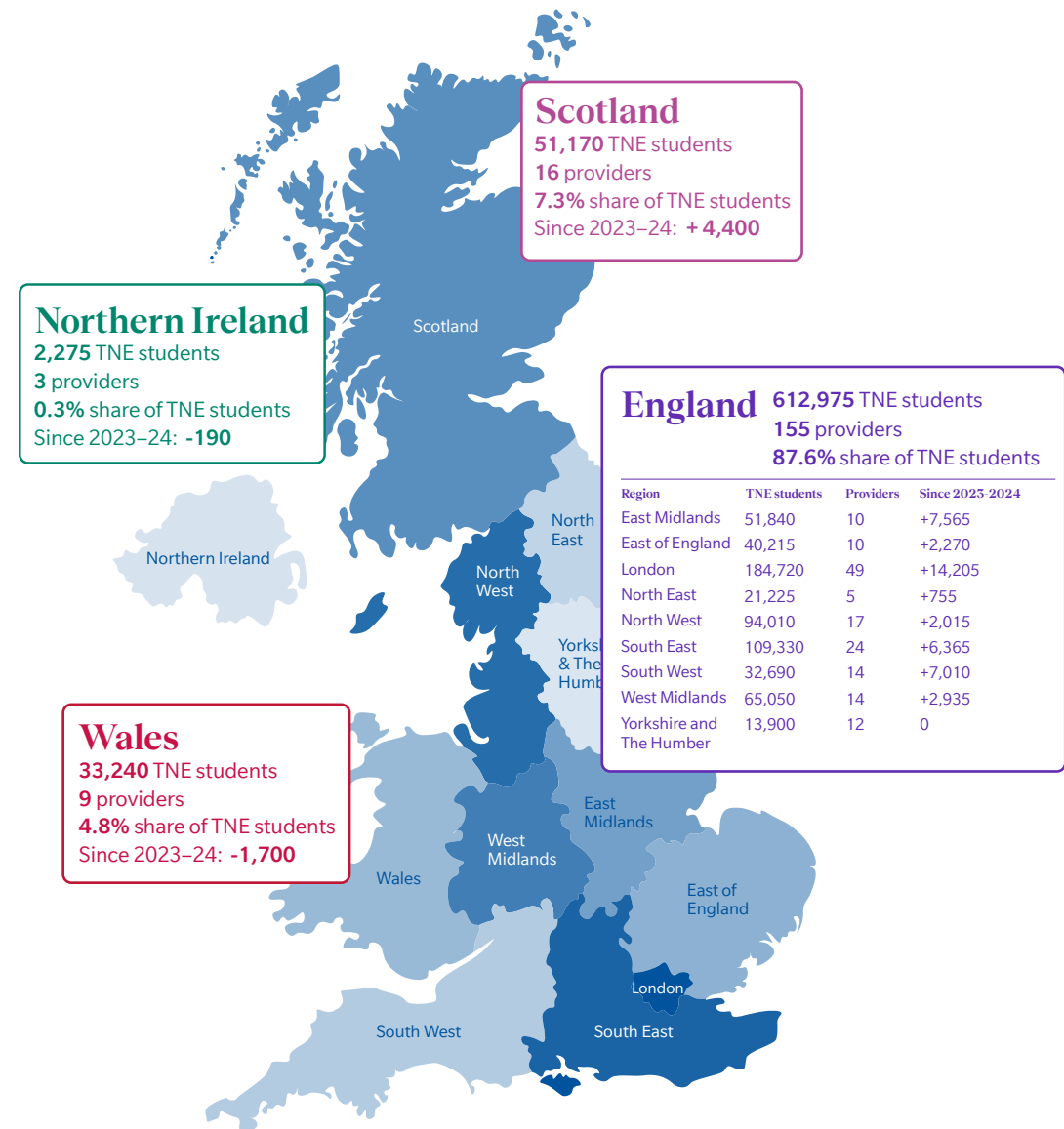
UK nations and regions

England has the highest average number of students per institution, with c. 3,955 students per provider. This is followed by Wales (c. 3,695 students per institution), then Scotland (c. 3,120 students per institution) and Northern Ireland (c. 760 students per institution). Scotland has the highest median of students per provider (2,675), followed by Wales (2,145), England (1,000) then Northern Ireland (445).

England has 18 of the top 20 providers, in terms of the number of students, with Wales and Scotland represented by one institution each in the top 20. Many of the providers with the smallest TNE populations are also English, with 41 English institutions reporting fewer than 100 students. 75.0% of Scottish providers have more than 1,000 TNE students, compared to 55.6% of Welsh providers, 49.7% of English providers, and 33.3% of Northern Irish providers.

Within England, the highest proportion of UK TNE students are studying with providers located in London (49 providers) and the South East of England (24 providers). However, since 2020–21, the regions of the UK with the highest growth rate in the number of TNE students have been the South West (+100.7% increase) and the East of England (+55.1% increase), followed by the North West (+54.1% increase) and the East Midlands (51.0% increase). This is higher than London's five-year growth rate (+37.8% increase). Scotland (+11.5%) and Wales (+4.5%) have seen smaller comparative growth over five years.

FIGURE 5 • TNE PROVISION BY UK NATION AND REGION, 2024–25



Data source: HESA AOR

Who provides UK HE TNE?

UK HE providers continue to expand and evolve their TNE provision according to institutional priorities and global demand. In 2024–25, 183 UK TNE providers delivered TNE, with 106 of those providers increasing their TNE numbers over the past year.

The mean (average) size of TNE population per institution has grown from 3,145 in 2020–21 to 3,825 in 2024–25. By removing the top and bottom 5% of providers to reduce the impact of outliers, the trimmed mean size of TNE population has grown from 2,165 in 2020–21 to 2,560 in 2024–25. 40 UK TNE providers had over 5,000 TNE students, and 18 UK TNE providers had over 10,000 TNE students.

The largest two providers of UK TNE remain The Open University and the University of London, with over 123,365 students (17.6%) represented due to their unique delivery models. 10 further UK providers had over 15,000 TNE students.

47 providers have grown by more than 1,000 students in 2024–25 compared to 2020–21. Of those providers, 14 providers have grown by more than 5,000 students, and four providers have grown by more than 10,000 students within the same timeframe. In five years, 73 UK providers have increased their TNE student numbers by more than 25%.

FIGURE 6 • UK HE TNE STUDENT NUMBERS PER PROVIDER, 2024–25

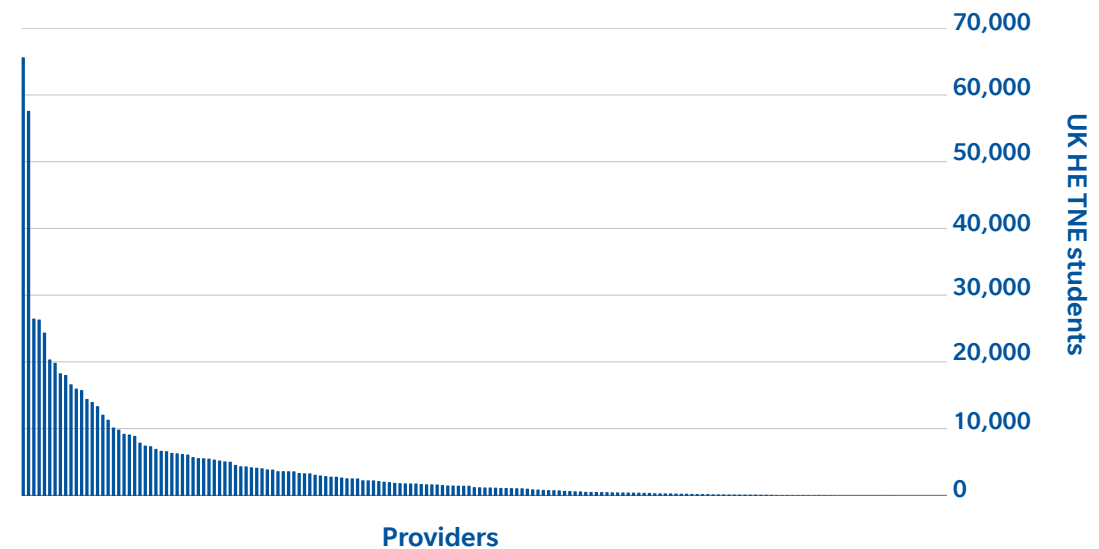
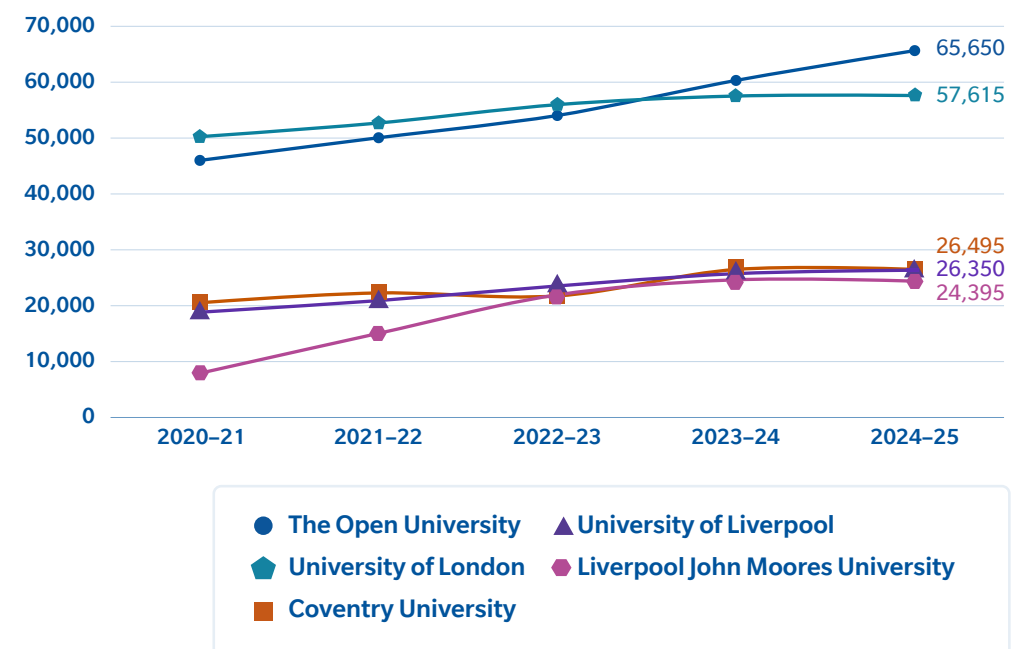


FIGURE 7 • UK HE TNE TOP FIVE PROVIDERS, 2020–21 TO 2024–25



Global analysis

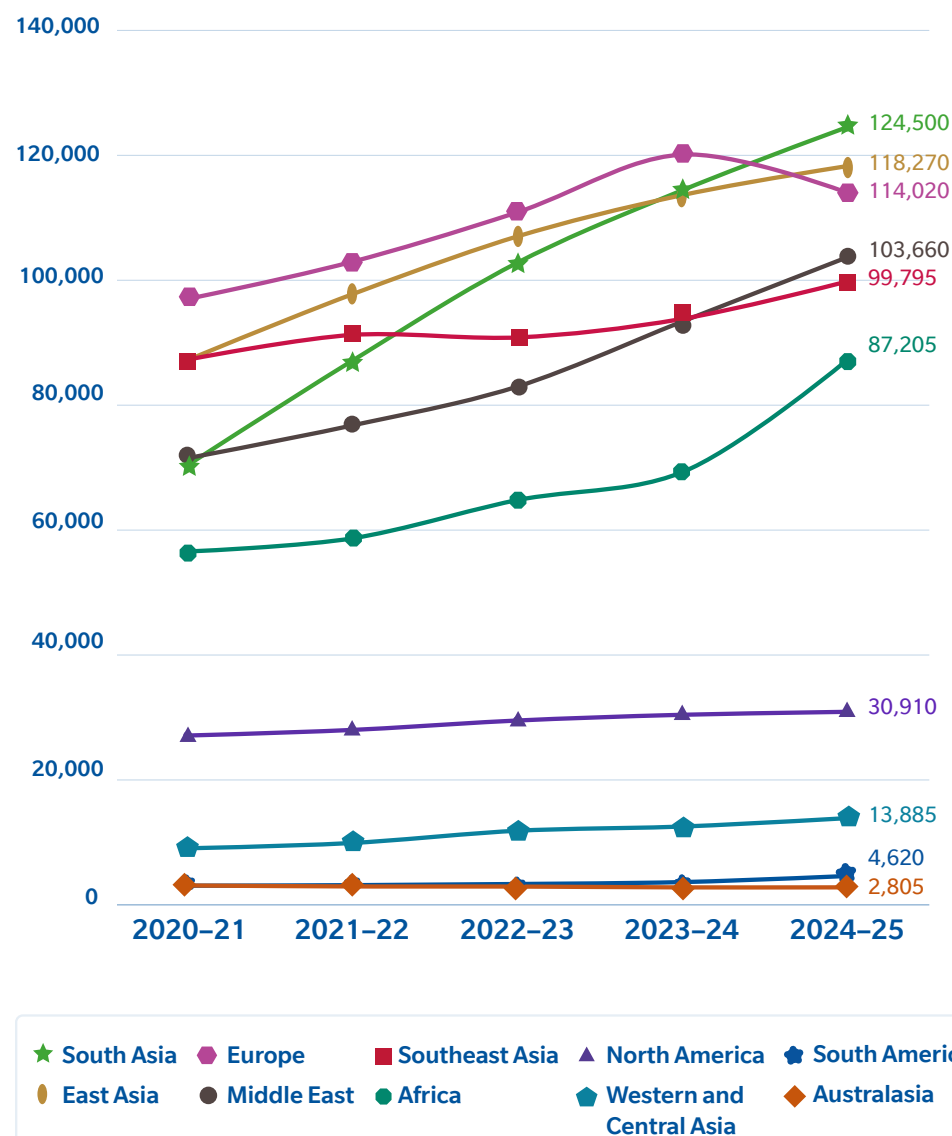
Asia hosted just over half of all UK TNE students (51.0%) in 2024–25. Despite a drop in student numbers, Europe remained the second largest host region (16.3%), followed by the Middle East (14.8%) and Africa (12.5%). Smaller TNE populations were hosted in North America (4.4%), South America (0.7%), and Australasia (0.4%).

South Asia hosted 124,500 TNE students in 2024–25, a +76.9% increase since 2020–21. This is closely followed by East Asia, hosting 118,270 students (+35.6% increase), then Southeast Asia hosting 99,795 students (+14.3% increase). The remaining 13,885 students are based in Central and Western Asia (+53.2% increase).

Since 2020–21, Asia has seen the fastest growth in absolute terms, with an additional 102,490 UK HE TNE students (+40.4% increase). Africa has seen the largest growth in percentage terms, with +54.1% growth over the past five years, followed closely by South America with a +50.7% increase in growth of TNE students.

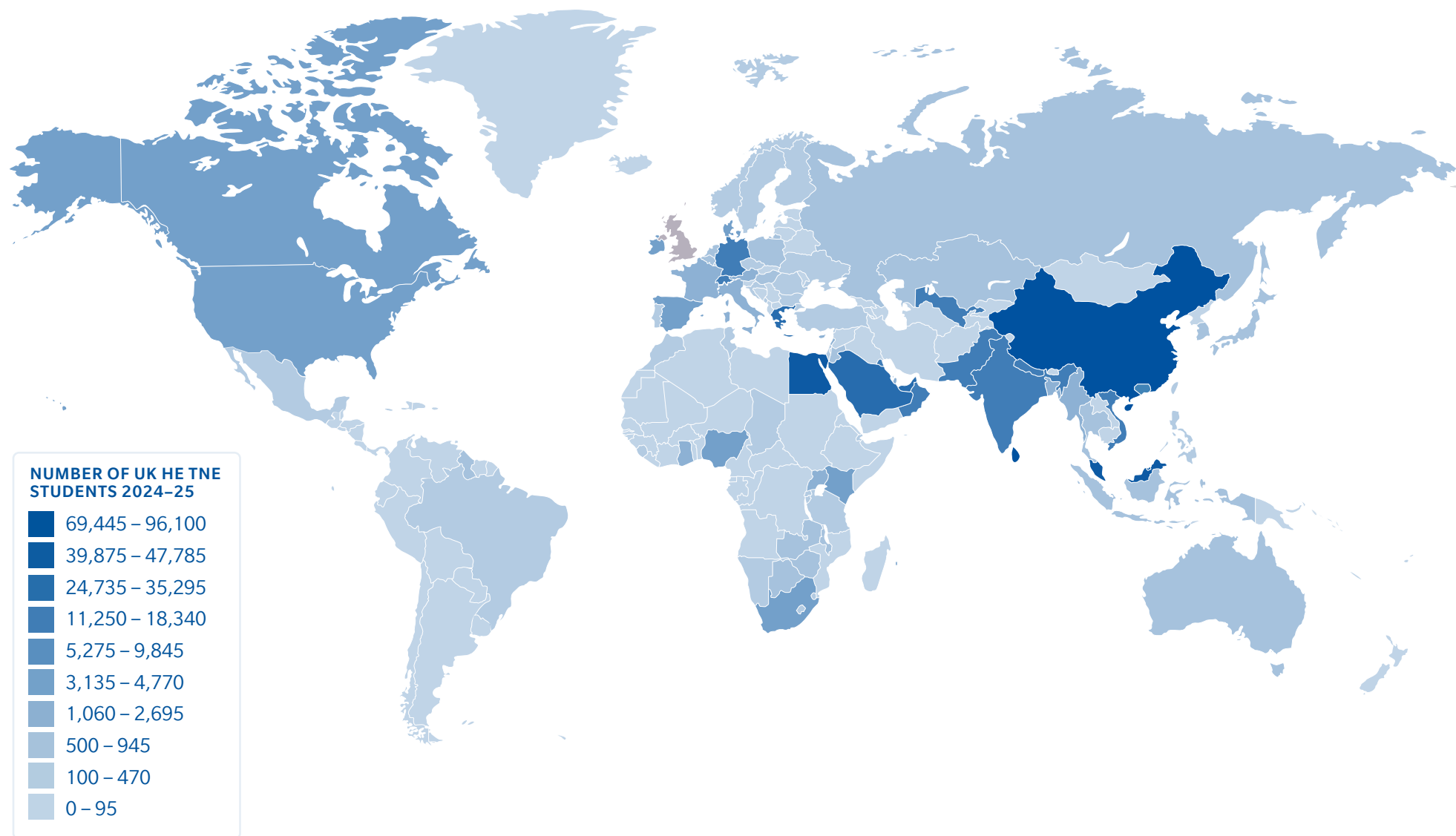
Over the past five years, there have been some significant shifts in the market share of TNE students hosted by world regions. In terms of market share, South Asia has risen the most.

FIGURE 8 • NUMBER OF UK TNE STUDENTS BY WORLD REGION, 2020–21 TO 2024–25



Where are UK HE TNE students located?

FIGURE 9 • WORLD MAP OF UK TNE PROVISION, 2024–25



Regional analysis

In 2024–25, the most prominent type of UK HE TNE in Asia, Africa, Europe and the Middle East was partnership provision. In Australasia and the Americas, there were more students studying via distance, flexible or distributed learning.

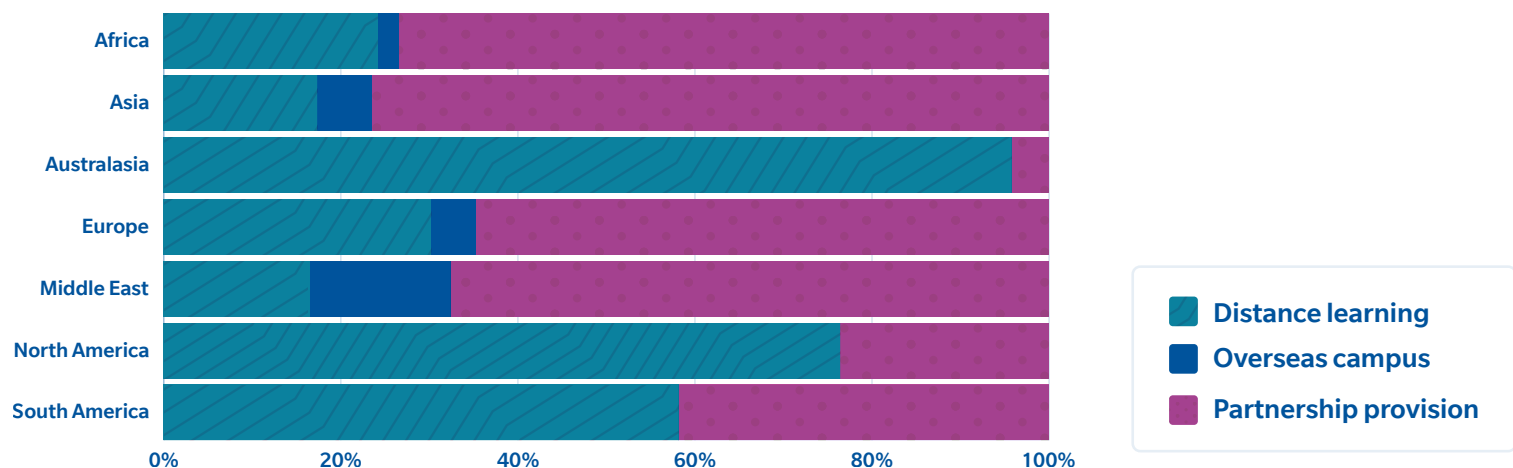
The host countries with the largest TNE populations studying at UK overseas campuses were the United Arab Emirates (15,470), China (12,700), and Malaysia (8,560). Partnership provision also has a large footprint in China (75,820) and Malaysia (34,355), as well as in Sri Lanka (66,180), Egypt (38,230), and Greece (33,935). Pakistan (15,135) remains the largest host of distance learning TNE students, followed by the USA (9,165), Singapore (8,940), and the UAE (8,600).

There are higher proportions of undergraduate UK TNE students in Asia (78.3%), the Middle East (74.6%), and Europe (59.8%). In contrast, there are higher proportions of postgraduate students in Australasia (69.2%), South America (65.6%), and North America (61.8%).

Seven countries had over 20,000 UK TNE undergraduate students, with China hosting the highest number (79,085), followed by Sri Lanka (50,995), Malaysia (41,960), Egypt (35,040), Greece (28,160) and Singapore (23,255).

Four countries had over 10,000 UK TNE postgraduate students, the top hosts also being Sri Lanka (18,450) and China (17,015), followed by the UAE (15,195) and Germany (10,000).

FIGURE 10 • PROPORTION OF UK HE TNE STUDENTS BY REGION OF STUDY AND TYPE OF PROVISION, 2024–25



Top countries/territories by region

FIGURE 11 • TOP COUNTRIES/TERRITORIES BY REGION

North America

1. USA	9,845
2. Canada	6,710
3. Trinidad and Tobago	6,030
4. Jamaica	1,965
5. Mexico	935
6. The Bahamas	765
7. St Lucia	755
8. Barbados	505
9. Cayman Islands	500
10. St Vincent and The Grenadines	440

South America

1. Guyana	2,285
2. Brazil	800
3. Peru	470
4. Colombia	320
5. Chile	175
6. Argentina	145
7. Uruguay	140
8. Ecuador	105
9. Bolivia	65
10. Venezuela	40

Africa

1. Egypt	39,875
2. Nigeria	9,355
3. South Africa	6,455
4. Kenya	5,790
5. Ghana	3,895
6. Uganda	3,455
7. Mauritius	3,260
8. Botswana	2,695
9. Zimbabwe	2,150
10. Zambia	1,275

Europe

1. Greece	35,295	6. Switzerland	5,275
2. Germany	17,340	7. Austria	4,770
3. Ireland	7,350	8. France	3,405
4. Denmark	5,600	9. Italy	3,355
5. Spain	5,570	10. Cyprus (EU)	3,185

East Asia

1. Mainland China	96,100
2. Hong Kong (SAR)	18,340
3. Japan	1,910
4. Korea (South)	1,150
5. Taiwan	550
6. Macao (SAR)	155
7. Mongolia	60

South Asia

1. Sri Lanka	69,445
2. Pakistan	18,055
3. Nepal	17,670
4. India	13,710
5. Bangladesh	3,175
6. Maldives	2,225
7. Afghanistan	210

Western and Central Asia

1. Uzbekistan	11,250
2. Kazakhstan	1,650
3. Azerbaijan	470
4. Armenia	235
5. Georgia	185
6. Tajikistan	50
7. Kyrgyzstan	30

Middle East

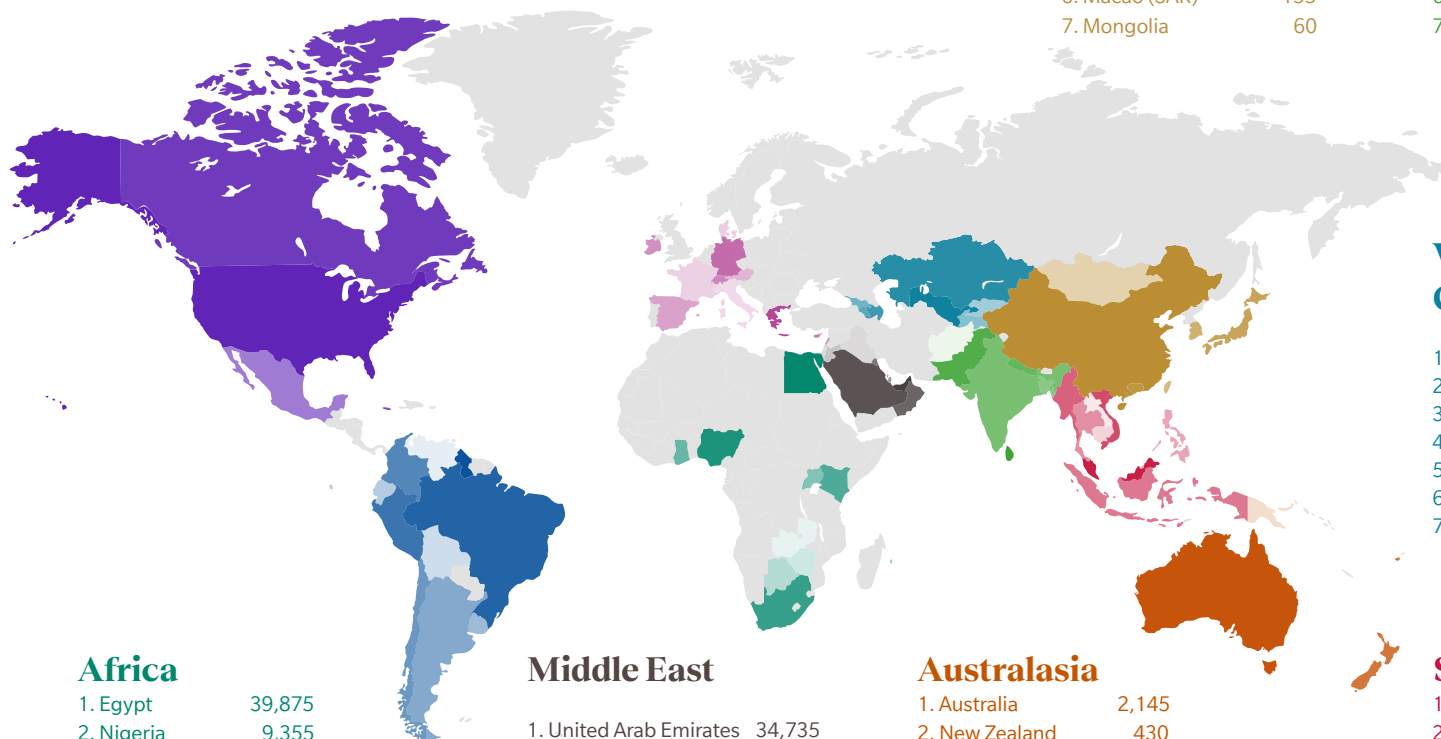
1. United Arab Emirates	34,735
2. Saudi Arabia	24,735
3. Oman	16,380
4. Kuwait	11,490
5. Bahrain	5,405
6. Qatar	3,955
7. Lebanon	3,500
8. Jordan	2,075
9. Iraq	435
10. Israel	340

Australasia

1. Australia	2,145
2. New Zealand	430
3. Fiji	95
4. Papua New Guinea	70

Southeast Asia

1. Malaysia	47,785
2. Singapore	31,395
3. Vietnam	13,410
4. Myanmar (Burma)	3,135
5. Indonesia	1,200
6. Thailand	1,145
7. Philippines	765
8. Brunei	615
9. Cambodia	290
10. Laos	30



Top 10 host countries/ territories

China, Sri Lanka, and Malaysia remain the top three UK TNE host countries, in the same order for the third year in a row. Singapore falls out of the top five for the first time, while Hong Kong only just remains in the top 10. Pakistan enters the top 10 for the first time, driven largely by strong growth in distance learning provision.

For 2024–25, within the top 20 host countries/territories for UK TNE, the highest year-on-year growth in TNE students has been in Nigeria (+39.7%), followed by the UAE (+24.6%) and Egypt (+24.4%). Other nations in the top 20 host countries and territories for UK TNE students that have seen significant growth are Nepal (+17.8%), Greece (+15.7%), Pakistan (+12.5%) and Saudi Arabia (+12.4%).

From 2023–24 to 2024–25, there were decreases in the number of UK TNE students hosted in Hong Kong (–11.0%), India (–9.6%), Ireland (–1.5%) and Singapore (–1.1%). Recent expansion of TNE in India is expected to lead to a return to growth in future data cycles.

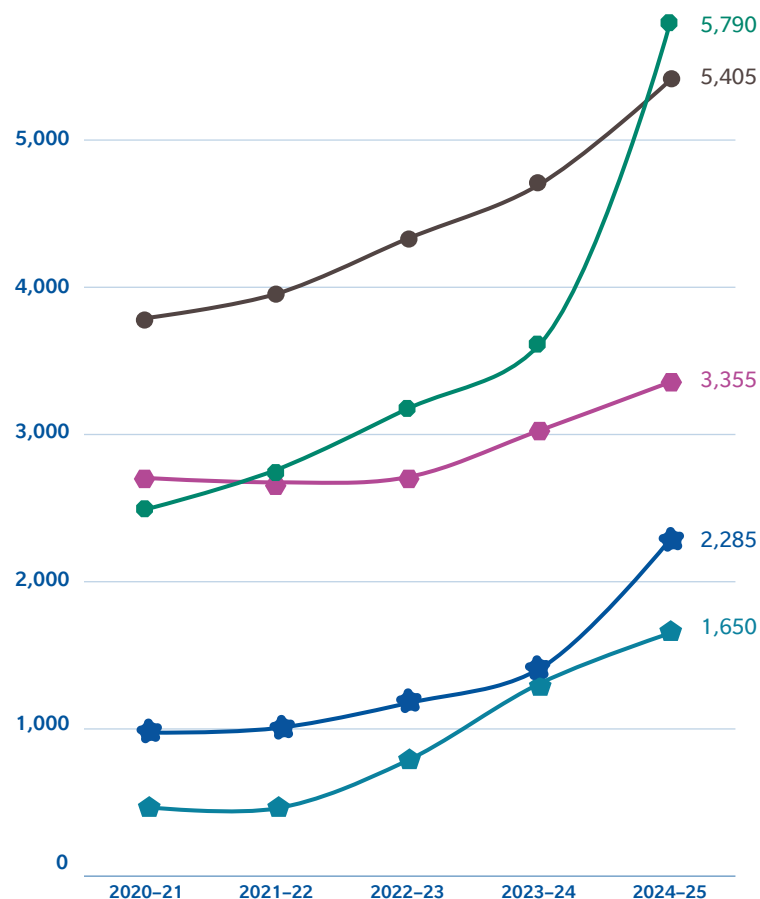
TABLE 1 • GLOBAL TOP 10 UK TNE HOST COUNTRIES/TERRITORIES 2024–25

	Country/territory of provision	Number of students 2024–25	Growth rate from 2023–24 (one year)	Growth rate from 2020–21 (five years)
1	 Mainland China	96,100	▲ +7.5%	▲ +56.2%
2	 Sri Lanka	69,445	▲ +10.3%	▲ +86.8%
3	 Malaysia	47,785	▲ +10.7%	▼ -1.4%
4	 Egypt	39,875	▲ +24.4%	▲ +67.0%
5	 Greece	35,295	▲ +15.7%	▲ +63.9%
6	 United Arab Emirates	34,735	▲ +24.6%	▲ +109.4%
7	 Singapore	31,395	▼ -1.1%	▲ +12.6%
8	 Saudi Arabia	24,735	▲ +12.4%	▲ +62.5%
9	 Hong Kong (SAR)	18,340	▼ -11.0%	▼ -19.2%
10	 Pakistan	18,055	▲ +12.5%	▲ +88.6%

Where is UK HE TNE rising?

Each new release of AOR data reflects a dynamic global landscape of new partnerships, campuses and delivery models. UK providers are active in many countries beyond the top 10, where student numbers may be smaller but the picture is just as dynamic. Some of these partner countries are featured here.

FIGURE 12 • COUNTRIES WITH RAPID GROWTH IN UK HE TNE STUDENT NUMBERS, 2020–21 TO 2024–25



Data source: HESA AOR

In 2024–25:

Kenya

5,790 students
+132.8% increase since 2020–21
10 in-person TNE providers
Global position, 2024–25: #24

Distance vs in-person learning

41.0% 59.0%

Undergraduate vs postgraduate

11.8% 88.2%

Bahrain

5,405 students
+42.5% increase since 2020–21
15 in-person TNE providers
Global position, 2024–25: #27

Distance vs in-person learning

16.0% 84.0%

Undergraduate vs postgraduate

82.3% 17.7%

Italy

3,355 students
+23.9% increase since 2020–21
24 in-person TNE providers
Global position, 2024–25: #35

Distance vs in-person learning

45.6% 54.4%

Undergraduate vs postgraduate

56.5% 43.5%

Guyana

2,285 students
+134.7% increase since 2020–21
5 in-person TNE providers
Global position, 2024–25: #43

Distance vs in-person learning

18.1% 81.9%

Undergraduate vs postgraduate

15% 85%

Kazakhstan

1,650 students
+250.0% increase since 2020–21
8 in-person TNE providers
Global position, 2024–25: #53

Distance vs in-person learning

27.3% 72.7%

Undergraduate vs postgraduate

85.7% 14.3%

A note on data and data access

Data about TNE is collected annually by HESA via the AOR. AOR data has been collected since 2007–08 from UK higher education providers who subscribe to HESA. In accordance with HESA's Standard Rounding Methodology:

- data has been rounded to the nearest 5
- any number lower than 2.5 has been rounded to 0
- percentages have been suppressed where totals are less than 25

Figures in this report are derived from HESA data accessed through Heidi+ and may differ slightly from HESA Open Data publications. All analysis in this report excludes further education provision, and provision where the location of study is marked as England, Wales, Scotland, Northern Ireland or Jersey. Differences also arise because our analysis includes dormant students to ensure UK-wide consistency, and reflects Heidi+ coverage and disclosure rules, including the exclusion of providers with Category 1 restrictions.

HESA Aggregate Offshore Record 2024–25
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Data access

The data behind all charts and tables in this report is available in a downloadable file: [download the full dataset](#) Each tab corresponds to a figure or table in the report and is labelled accordingly.

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