

The Customer Journey of International students in the UK

Summary of research among new IHE students in the UK prepared for
The British Council, the GREAT Britain campaign and participating HEIs



Objectives

- To understand better the decision-making process of international students recently arrived in the UK
- To understand the range of influences on the decision to choose the UK
- To understand the perceived competitive advantages and disadvantages of the UK as a study destination



Background

- The survey research was undertaken on behalf of the GREAT Britain campaign and the British Council*
- Distribution of the survey was facilitated by the NUS and more than 70 UK HEIs
- The survey was targeted at new (2014/15 academic year) international students starting a course at a UK HEI
 - the main focus was non-EU international students
- **We asked about:**
 - Length of the decision making process
 - Motivations to study internationally
 - Influences on the decision
 - Other countries considered as a competitor destination
 - What's next after finishing the course?
 - ... **and much more**

* Disclaimer: Findings and interpretation presented in this report are the opinion of In2Impact and Research Stories. They do not reflect the opinion or policy of the British Council or the GREAT Britain campaign

Methodology

- **Online questionnaire distributed to first year international students at a UK higher education institutions (HEI)**
 - Each HEI was provided with a unique web link to the questionnaire
 - Local IOs distributed the link to their own first year international students
 - Targeting both UGs and PGs with a focus on students from outside the EU
- **More than 70* UK HEIs facilitated the research**
 - Russell-group / non-Russell group
 - London / outside London
 - England, Scotland, Wales, Northern Ireland
- **1616 valid responses received from students registered as international students at their HEI****
 - Respondents asked for verifiable details to ensure legitimate student status
 - Duplicates and responses without details excluded
 - Highest respondent numbers from China, USA, India, Malaysia, Brazil, Canada, Hong Kong
- **Online fieldwork by Research Stories: Nov 2014 – Feb 2015**

* 70 HEIs had at least 2 respondents

** Some additional responses were received from students not registered as international students but have been excluded from the analysis presented here

Key findings and action points

Findings	Action Points
<ul style="list-style-type: none"> • The share of students from Brazil within STEM courses is now very significant • These students are usually funded by the Science without Borders (SwB) programme 	<ul style="list-style-type: none"> • Brazil's outbound SwB programme has had a dramatic influence in a short period of time, especially on one year study visits • The future of the SwB programme is uncertain. The sector needs to plan to close the gap left if and when the funding tap is turned off by Brazil
<ul style="list-style-type: none"> • The motivation to international study is as much about new experiences of life and culture as it is about education <i>per se</i> – especially at Undergraduate level 	<ul style="list-style-type: none"> • The UK's lifestyle and cultural brand is strong and powerful in attracting international students • Sector marketing needs to strike the balance between promoting educational opportunities and showcasing the wider attractions of life in the UK
<ul style="list-style-type: none"> • The decision to study internationally is often long and complex – frequently taken over more than a two year period 	<ul style="list-style-type: none"> • The sector should be planning two or three student intakes ahead to highlight the attraction of the UK as a study destination and to build institutional brand awareness
<ul style="list-style-type: none"> • Friends and family are key influences on the international study decision • More than two in five non-EU international students already have friend/family connections to the UK 	<ul style="list-style-type: none"> • The sector should see the current generation of students as the brand ambassadors and word-of-mouth marketers for the next generation • The sector could explore further opportunities to engage with the large diaspora and alumni populations from key markets, already in the UK. They are a key influence channel to prospective students in origin countries

Key findings and action points

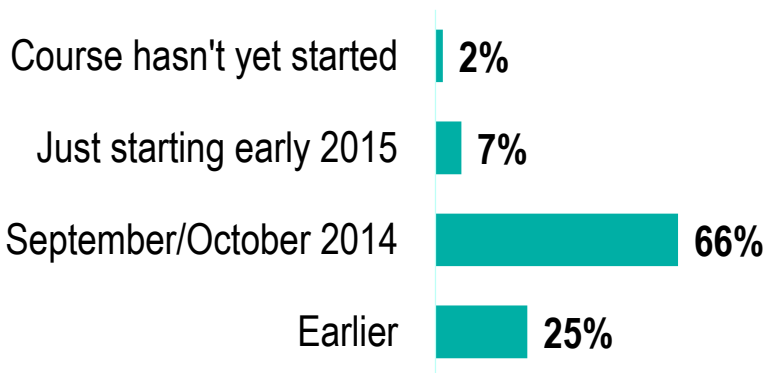
Findings	Action Points
<ul style="list-style-type: none"> • The USA remains the clear alternative for non-EU students coming to the UK, followed by Australia and Canada • A small but potentially growing number of international students are also considering European alternatives 	<ul style="list-style-type: none"> • The sector should continue to benchmark the UK offer against the USA and other English speaking competitors • But longer term it needs to be aware of increasing competition from Europe – notably from Germany and the Netherlands
<ul style="list-style-type: none"> • The UK offer is perceived to be highly competitive in terms of quality of universities, international recognition of qualifications and attraction of the UK • The UK is weaker in terms of perceived affordability, access to post-study employment and, to some extent, welcome 	<ul style="list-style-type: none"> • The sector needs to view affordability as the combined costs of tuition, accommodation and daily life and recognise that the UK is increasingly looking like an expensive option in some markets • The sector needs to continue to make its case to government about the importance of a post-study employment route
<ul style="list-style-type: none"> • Agents remain a crucial intermediary, advising up to one third of non-EU students coming to the UK • Agents are also providing practical help to many students in obtaining visas and especially so to students more concerned about their ability to gain a study visa for the UK 	<ul style="list-style-type: none"> • Constructive engagement with agents remains important. They need to be kept informed of issues affecting their local markets and used positively as an outreach and engagement channel • The sector also needs to understand the messages agents are giving enquirers about both the UK offer and access to visas
<ul style="list-style-type: none"> • More than a fifth of non-EU UG students are planning to continue their studies in the UK after their current course 	<ul style="list-style-type: none"> • It is potentially easier and cheaper to market PG courses to international students already in the UK than to students overseas

Contents

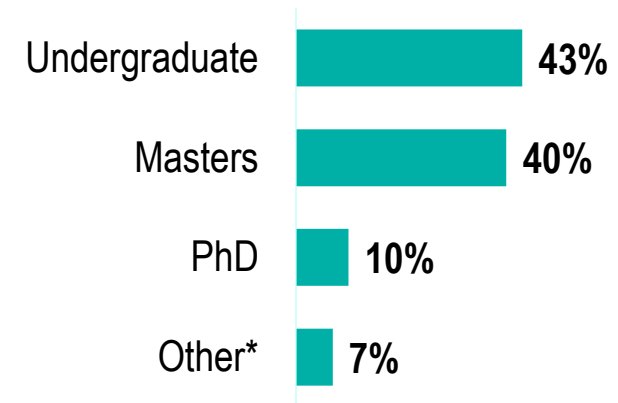
- **Respondent student profile**
- The motivations to study internationally
- Influences on the decision-making process
- The competitive position of the UK as a study destination
- The gatekeeper role of agents
- Ambitions after study

Respondents are a good mix of UG and PG international students

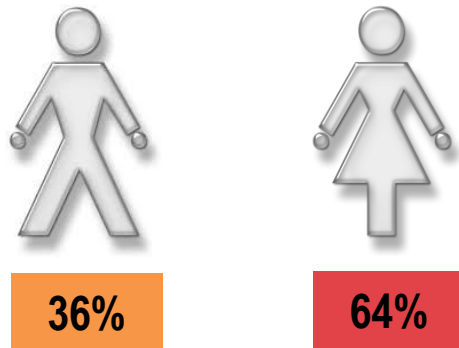
When did you start your current university course in the UK?



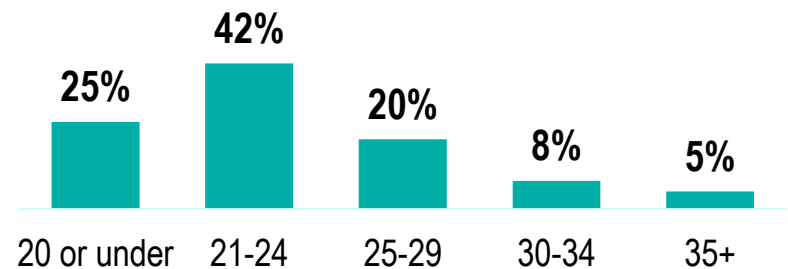
At what level are you studying?



Gender



Age

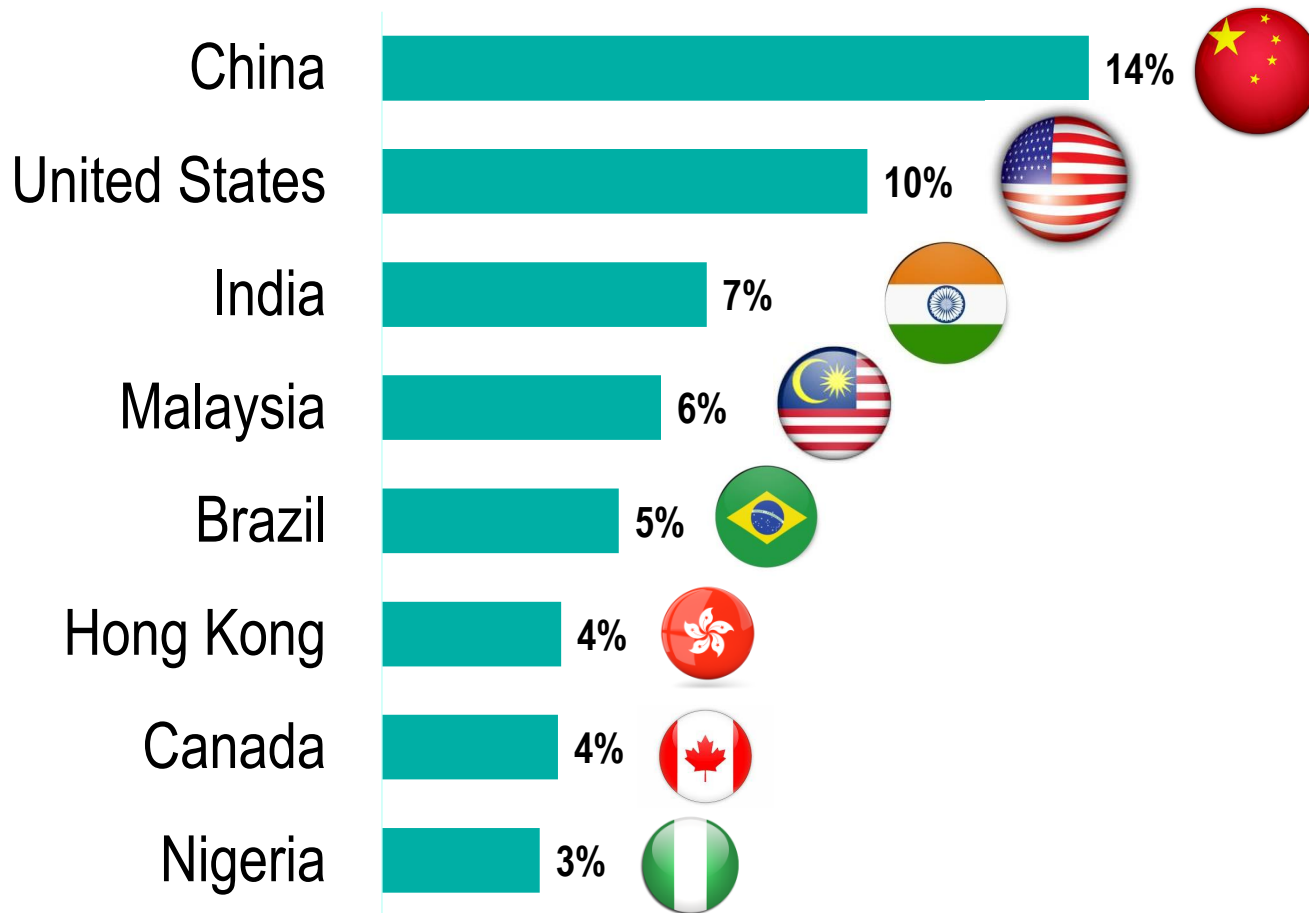


Base: Respondents registered as international students (1616)

* Other includes Short course / exchange visit Foundation / Pathway Vocational / BTEC PGCE

Respondents broadly reflect the major origin countries for non-EU students in the UK

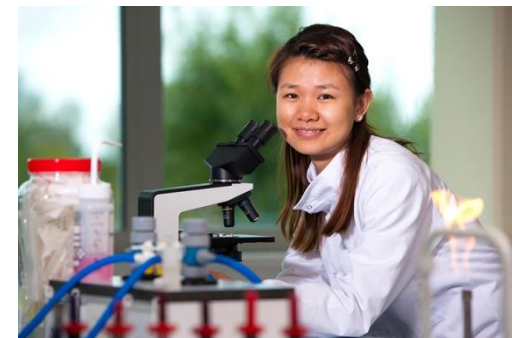
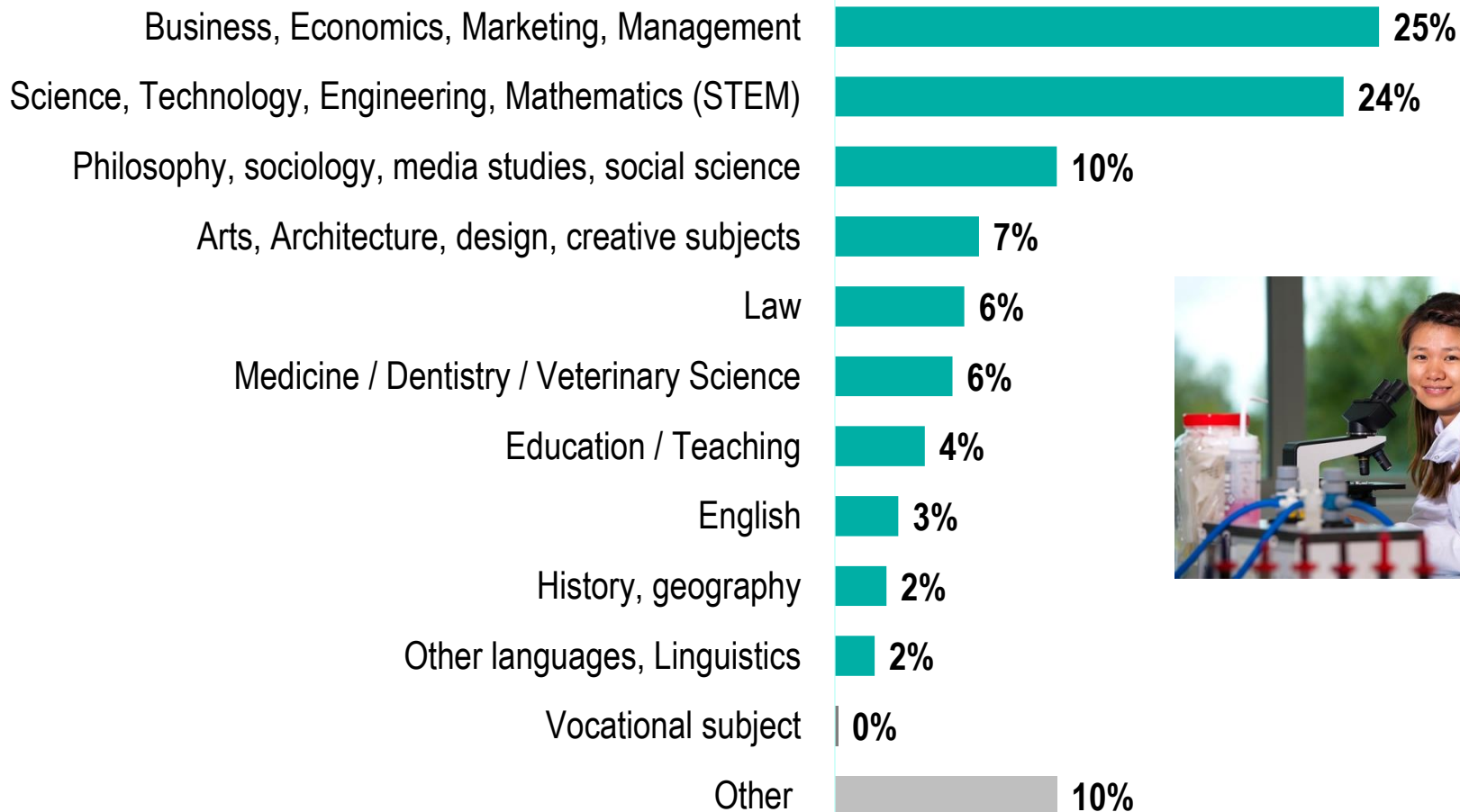
Of which country are you a citizen?



Base: Respondents registered as international students (1616)




Half of respondents are studying business or STEM subjects

What are you studying in the UK?



Chinese respondents are very heavily concentrated in business subjects

Top 3 study areas for the top 3 respondent countries










			
1st	Business, Economics, Marketing, Management 48%	Philosophy, sociology, media studies, social science 18%	STEM 34%
2nd	STEM 23%	Business, Economics, Marketing, Management 14%	Business, Economics, Marketing, Management 33%
3rd	Philosophy, sociology, media studies, social science 9%	STEM 10%	Law 6%

Base: China (233), USA (160), India (107)

NB: 17% of students from USA said that they were studying 'Other' subjects

The dramatic impact of the Science without Borders programme is reflected in Brazil's share of international STEM students in the UK

Top 3 sender countries for the Top 3 study subjects

	Business, Economics, Marketing, Management	Science, Technology, Engineering, Mathematics (STEM)	Philosophy, sociology, media studies, social science
1 st	 27%	 14%	 17%
2 nd	 8%	 14%	 13%
3 rd	 5%	 9%	 5%

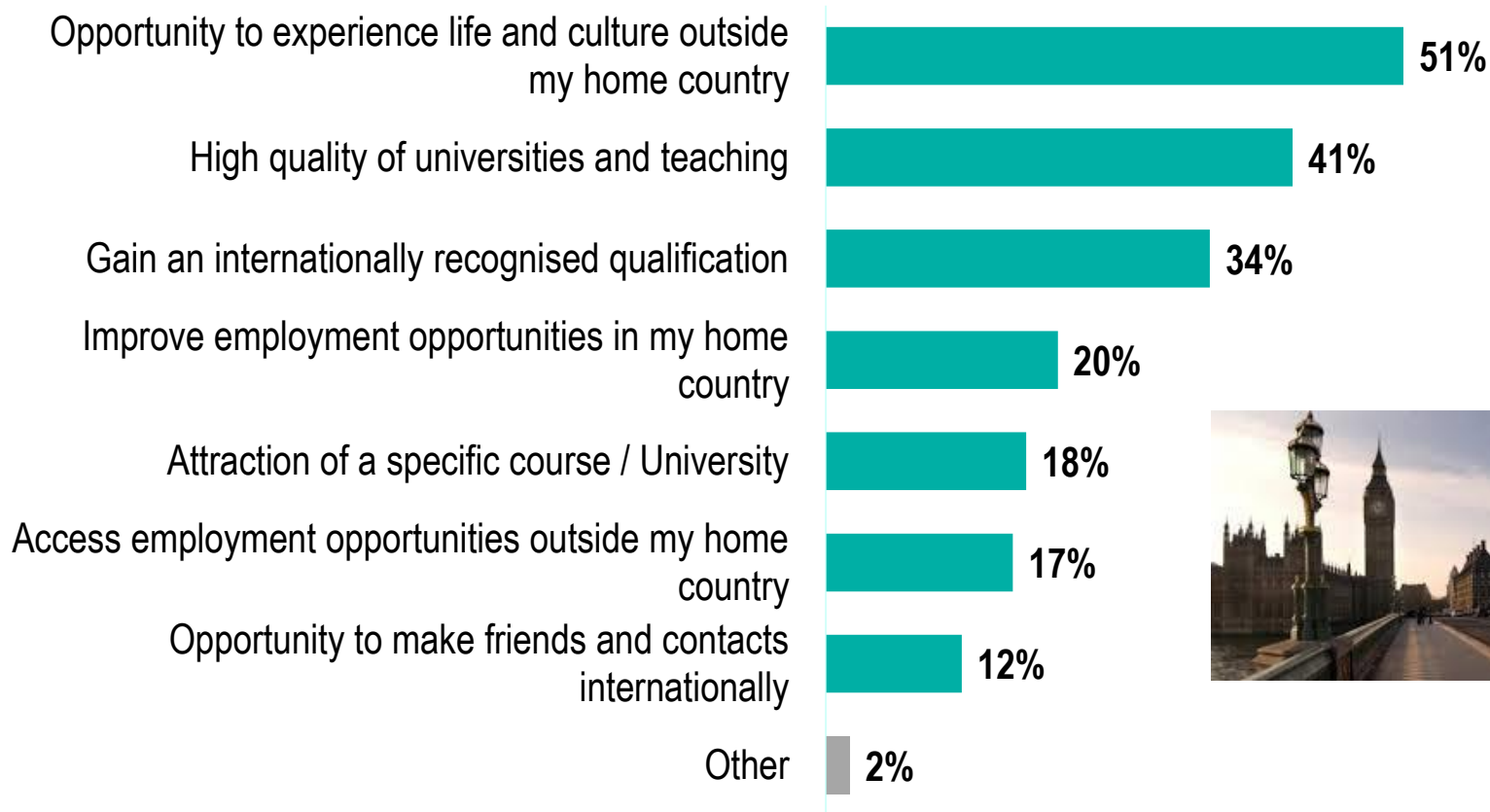
Base: Business, Economics, Marketing, Management (412); STEM (385); Philosophy, sociology, media studies, social science (168)

Contents

- Respondent student profile
- **The motivations to study internationally**
- Influences on the decision-making process
- The competitive position of the UK as a study destination
- The gatekeeper role of agents
- Ambitions after study

The wider opportunity to experience life and culture internationally is a strong driver of international study

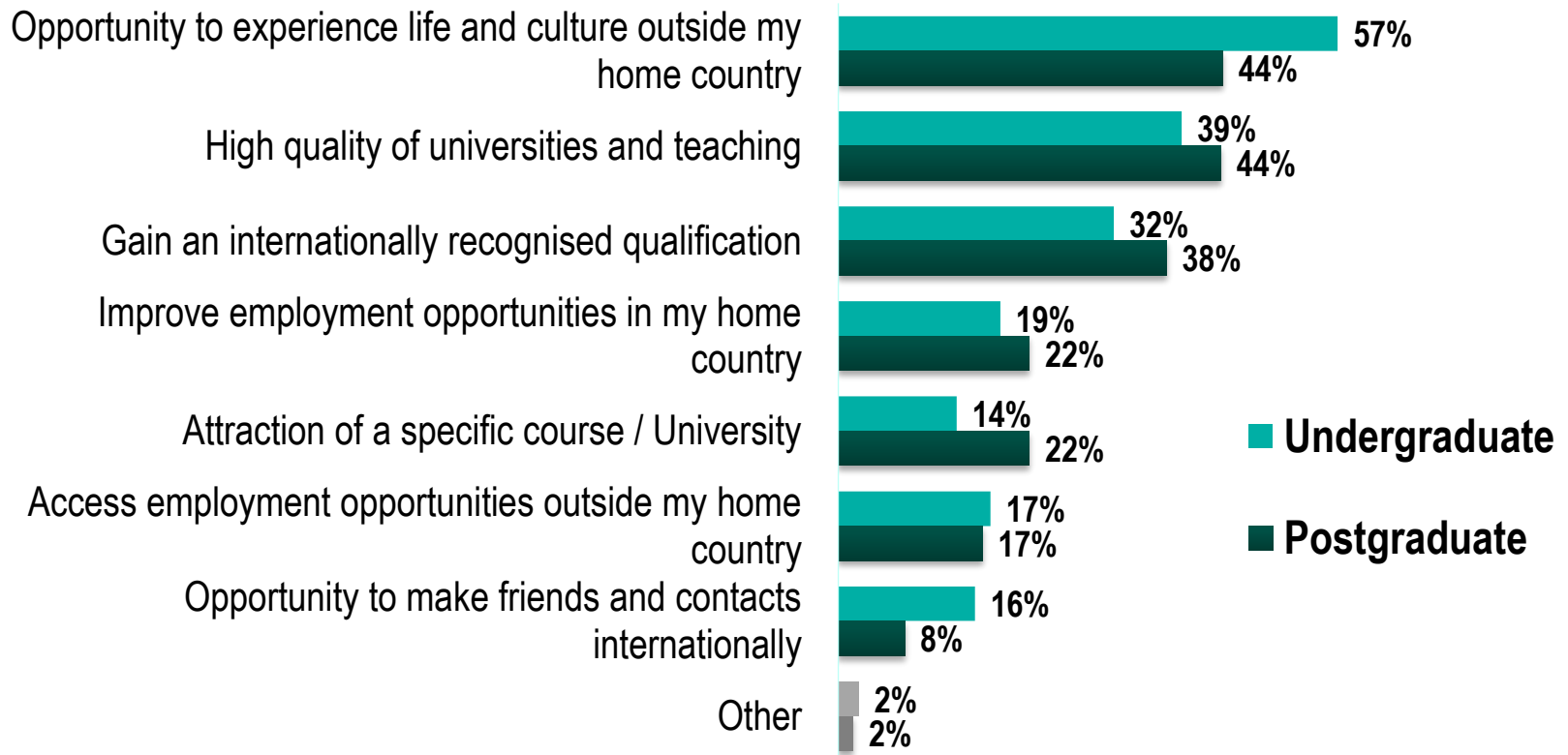
Which TWO of the following are the most important reasons for studying internationally?



Base: Respondents registered as international students (1616)

International undergraduates are particularly motivated by the chance to experience a different way of life and culture

Which TWO of the following are the most important reasons for studying internationally?
By level of study



Base: Respondents registered as international students :Undergraduate (723); Postgraduate (818)
Undergraduate includes those at Foundation courses; Postgraduate includes Masters, PhD, PGCE

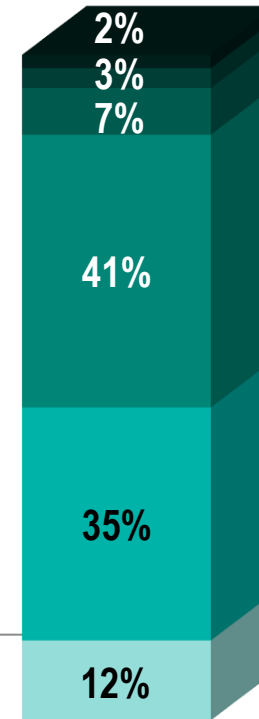
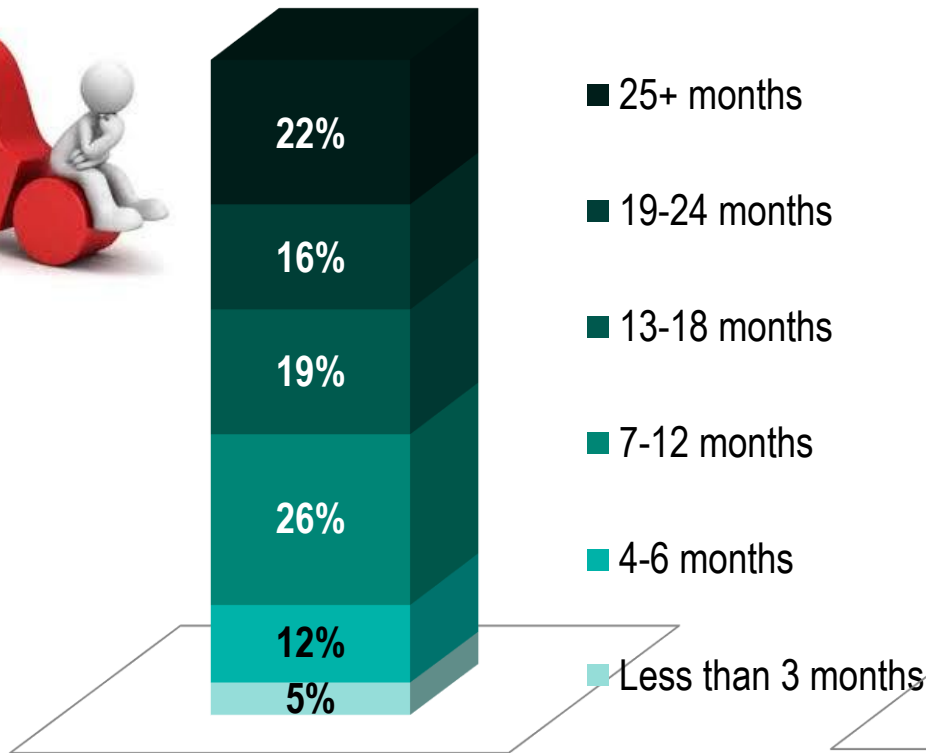
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Decisions about studying internationally can start a full two years or more in advance of beginning the course

Approximately how far in advance did you start thinking seriously about studying internationally?

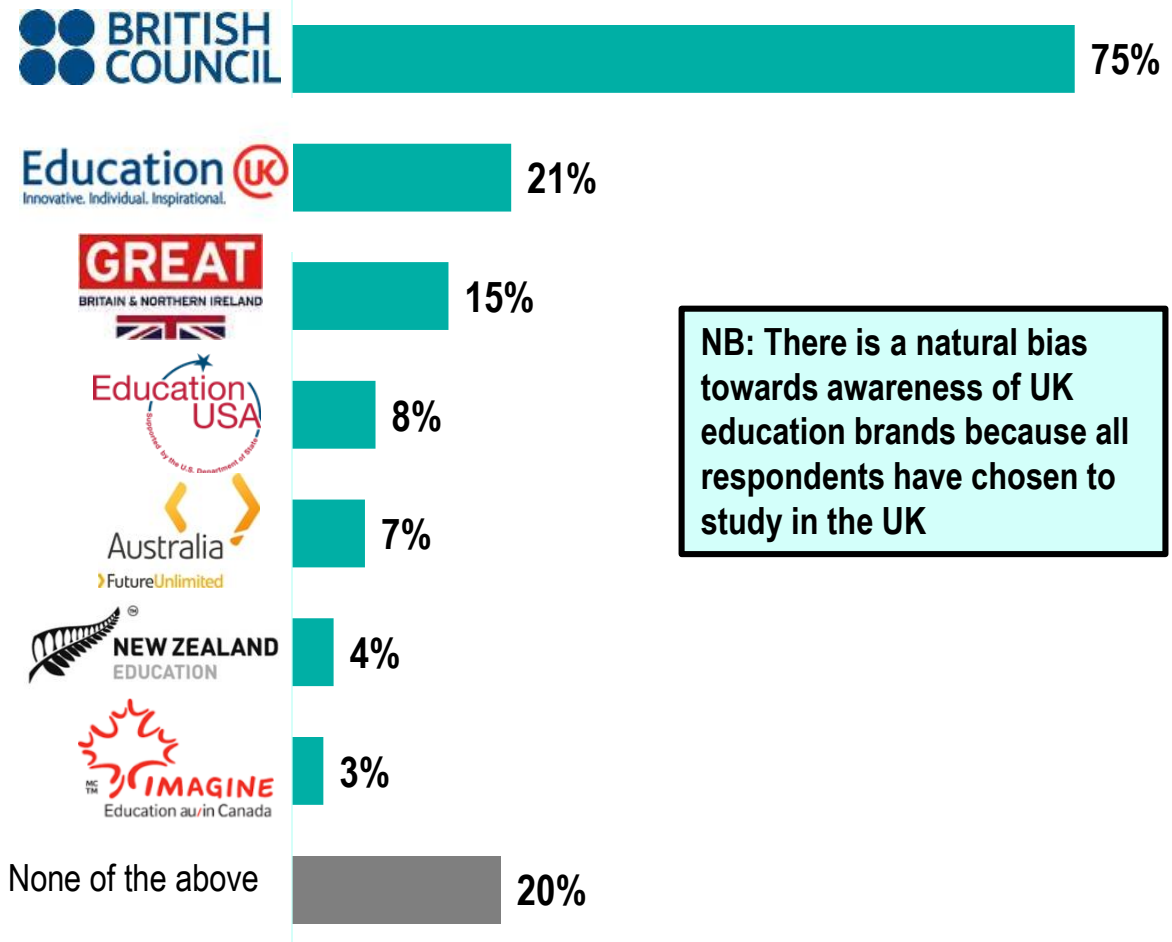
...and how far in advance did you apply to your current course in the UK?



Base: Respondents registered as international students (1616)

Awareness of the British Council as an education brand in international markets is very high

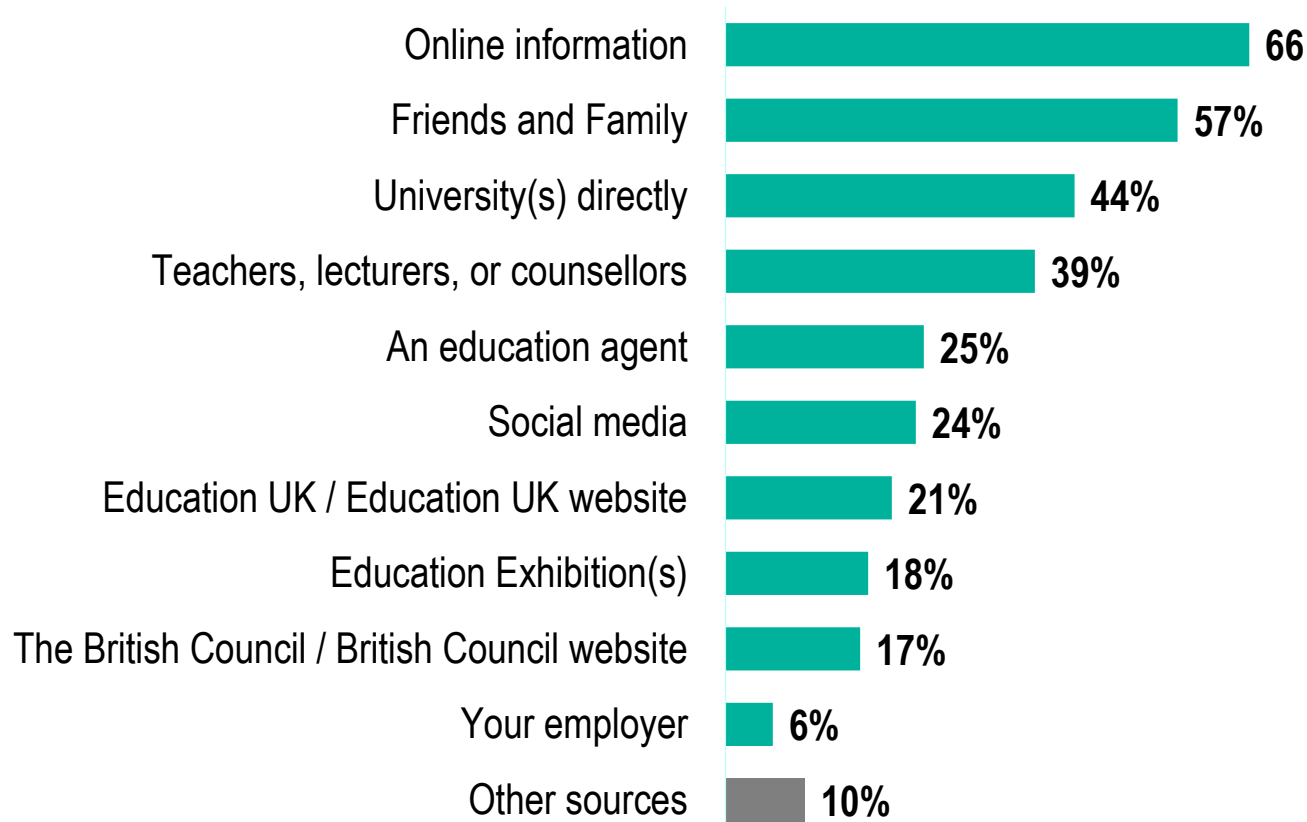
Which, if any, of these brands are you aware of? [response to brand images]



Base: Respondents registered as international students (1616)

Prospective students consult a wide range of sources while deciding where to study internationally

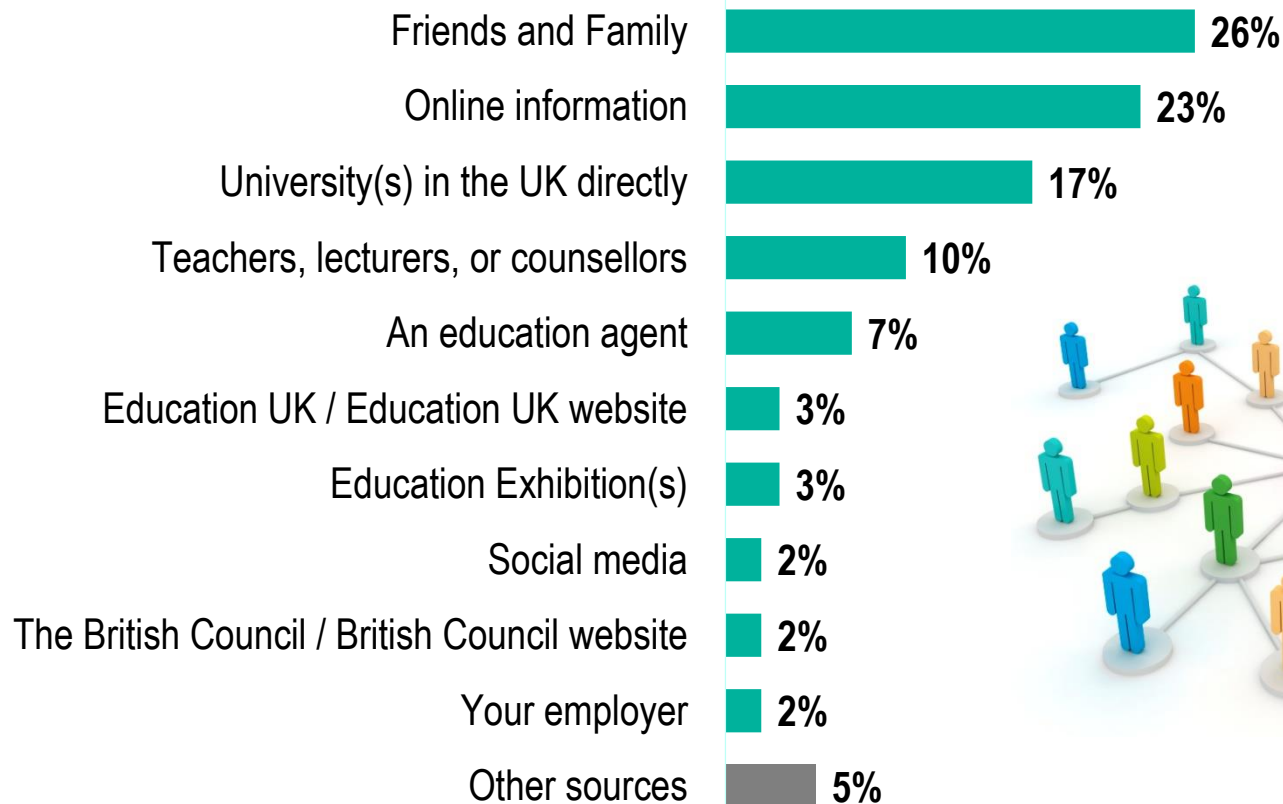
Which of the following did you use/consult while deciding where to study internationally?



Base: Respondents registered as international students (1616)

Trusted friends and family are the single greatest source of influence on the decision to study in the UK

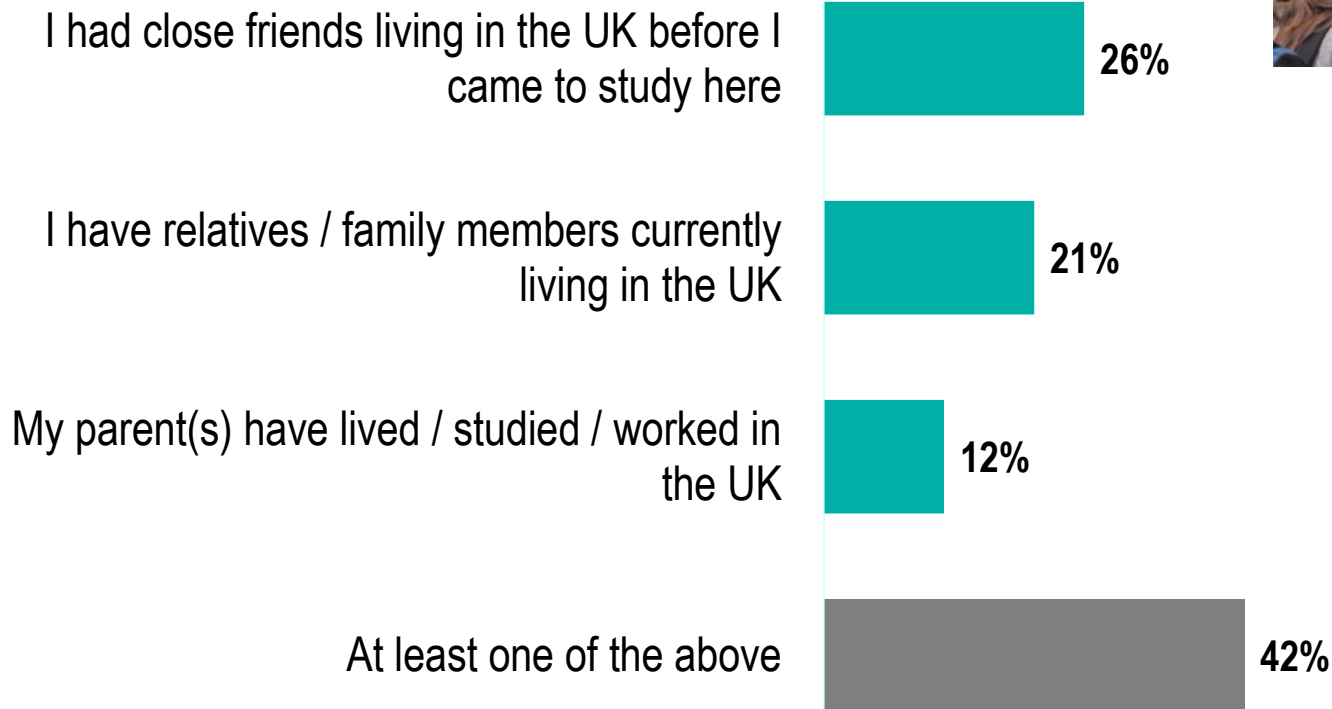
Which one of these was the **MOST INFLUENTIAL** on your decision to study in the UK



Base: Respondents registered as international students (1616)

More than two in five non-EU international students have existing family and friendship connections with the UK

Do any of the following apply to you?



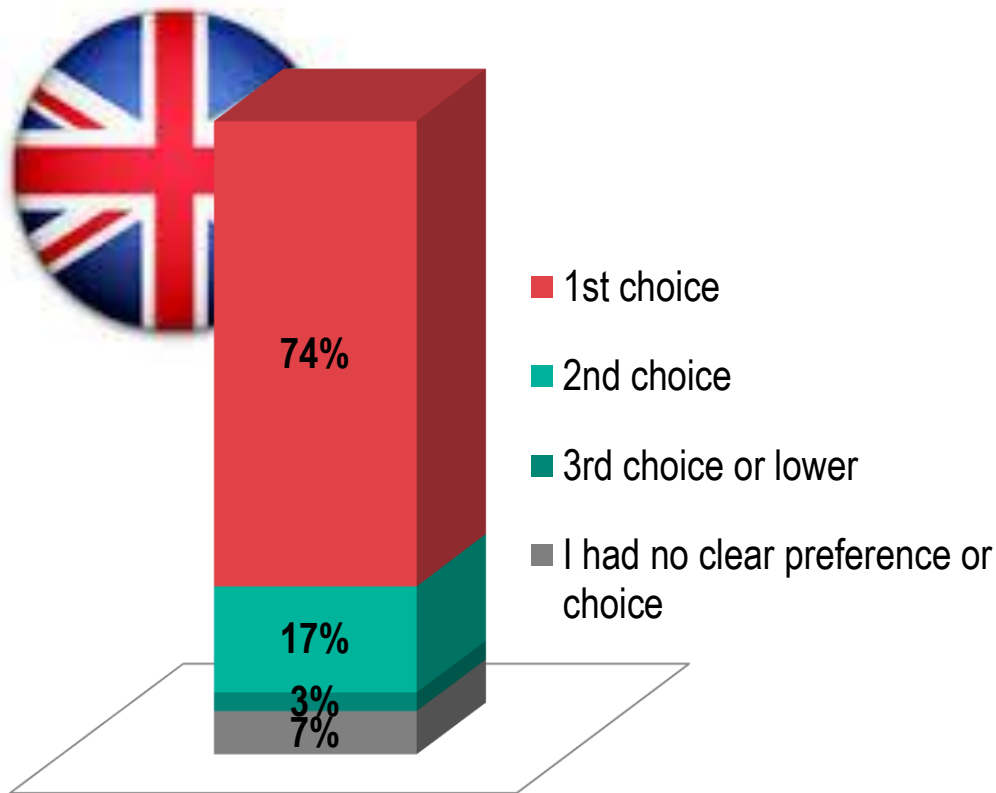
Base: Respondents registered as international students (1616)

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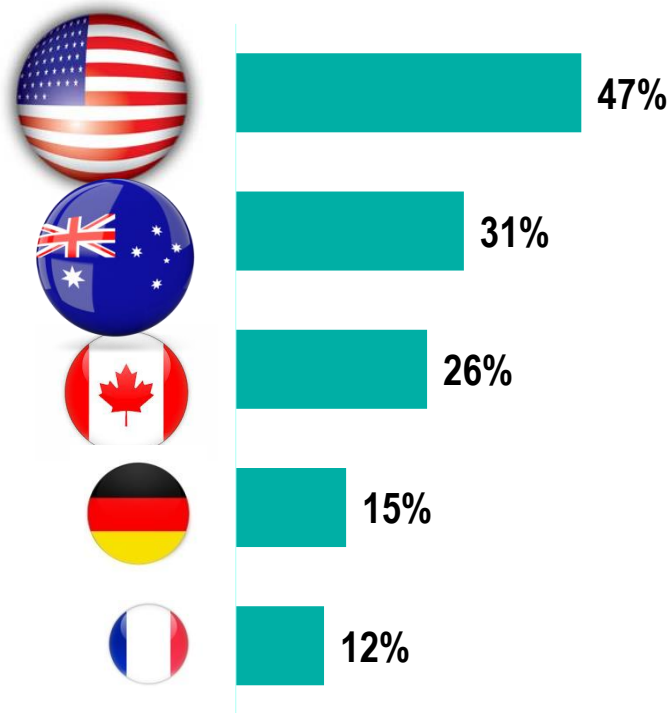
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The USA is the number one alternative for students who choose to come to study in the UK - but some also consider European competitors, too

When I first started thinking seriously about studying internationally, the UK was my...



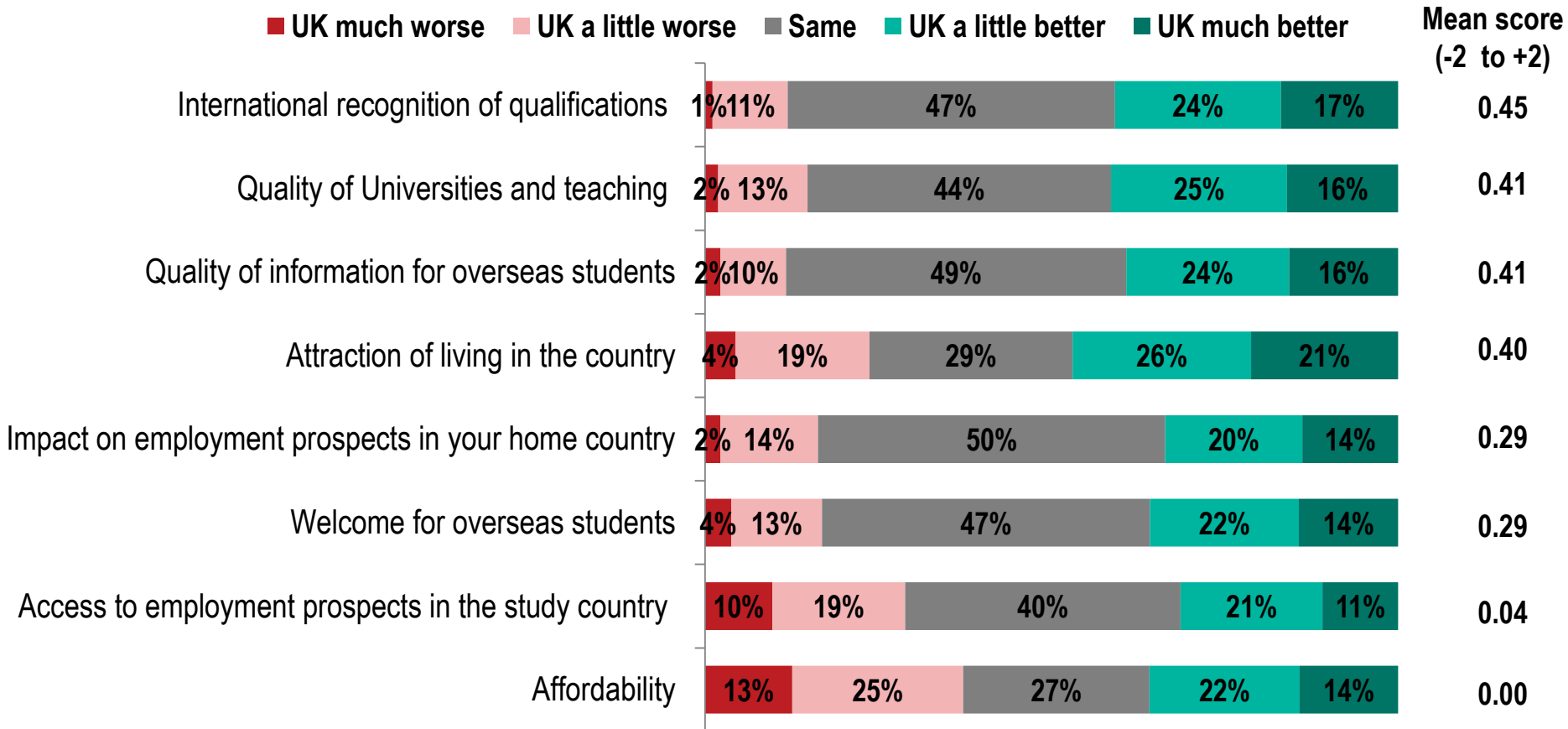
Top 5 alternative countries considered (excluding home country)



Base: Respondents registered as international students (1616)

Competition to the UK is particularly strong around perceived affordability and access to employment in the study country

Compared to what you see as its main competitor country, how do you rate study in the UK for:



Base: Respondents registered as international students (1616)

NB: Average across all main competitors

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Between a quarter and a third of all mainstream international students use or consult an agent

% of respondents who used/consulted an Agent while deciding where to study internationally
By level of study



Foundation/Vocational/Other

32%

Masters

28%

Undergraduate

27%

PhD

13%

Short course / exchange visit

6%

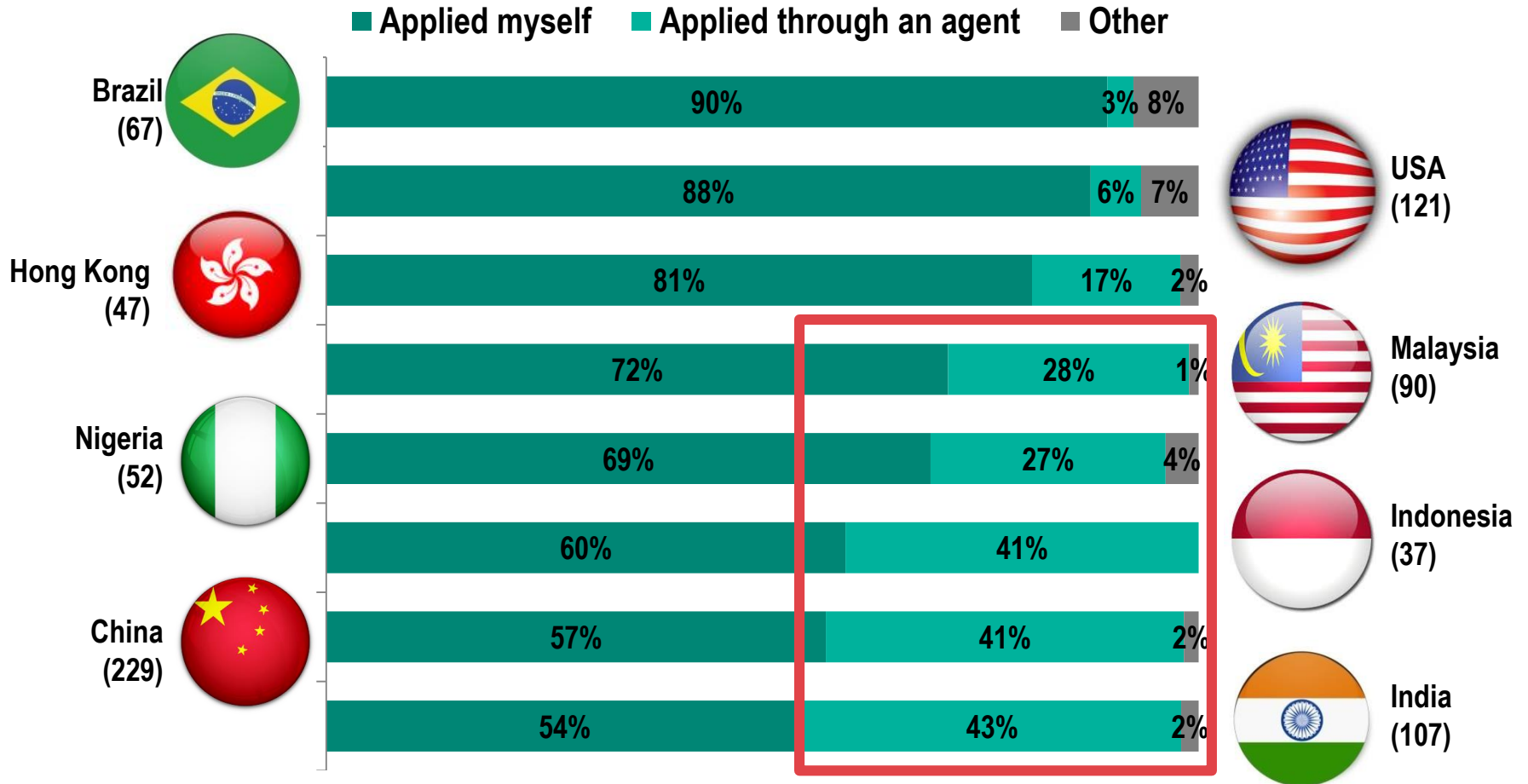
Base: Respondents registered as international students (1616)

Masters level students include small number of PGCE

Base size for Foundation/Vocational/Other is relatively small, results are indicative only

In major markets agents also play an important role in the visa application process to study in the UK

Mode of applying for a UK visa - by respondent's nationality

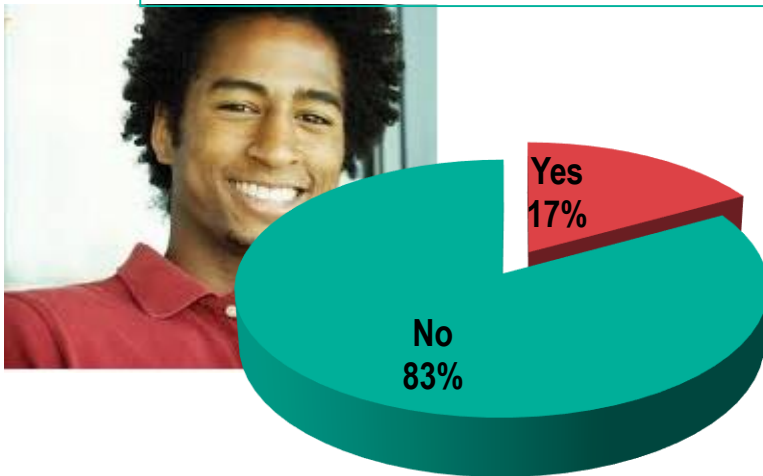


Base: () those who needed a visa to study in the UK from each specified country
 NB: some bases are small, therefore results should be taken as indicative only

International students applying for a visa via an agent are more likely to have been advised that obtaining a UK visa will be difficult

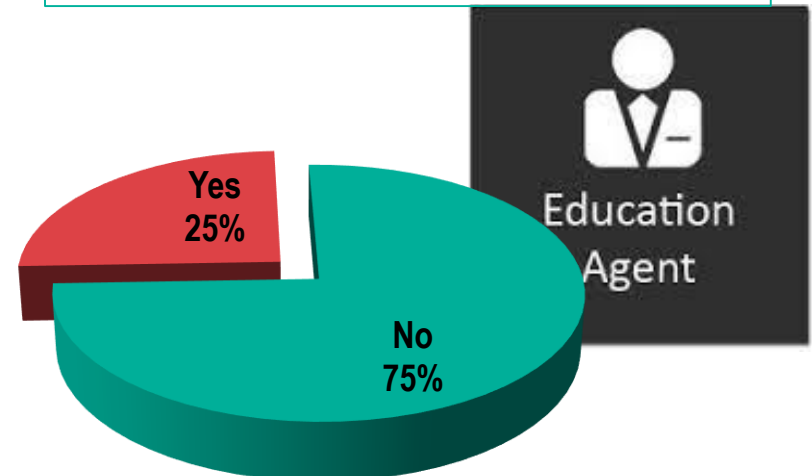
Did anybody advise you against applying to study in the UK because it would be difficult to get a visa?

Mode of applying for a UK study visa
'applied myself'



Base: Respondents applying for a UK study visa themselves (891)

Mode of applying for a UK study visa
'applied through an agent'



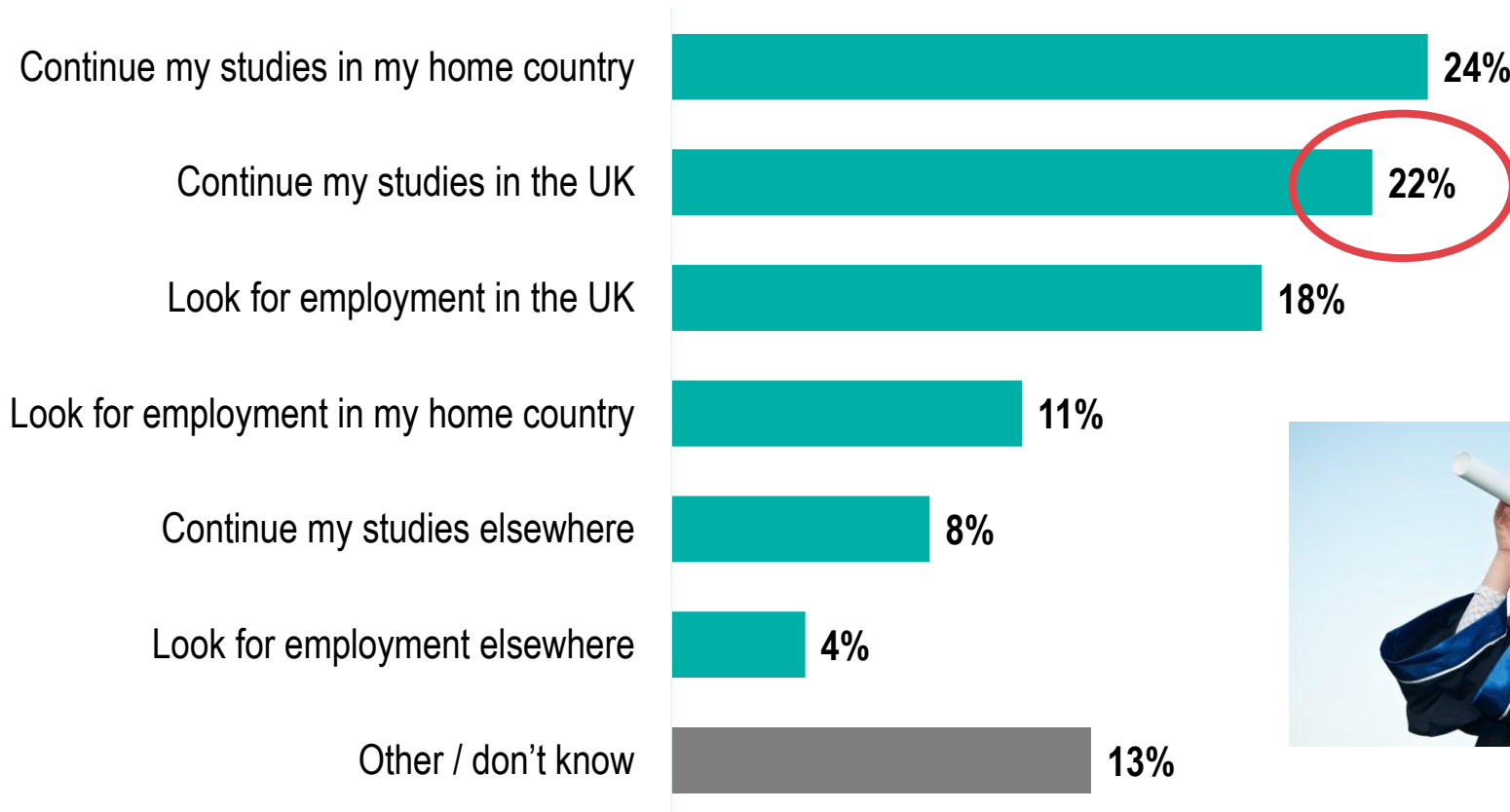
Base: Respondents applying for a UK study visa through an agent (316)

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More than a fifth of international UG students are planning to continue their studies in the UK after finishing their current course

What do you plan to do after finishing your current course?
International students currently studying in the UK at Undergraduate level



Base: Respondents registered as international students and currently studying at undergraduate level (696)

Thank you!