



# Why the UK?

The Customer Journey of First Year International students in the UK

Prepared by Research Stories in collaboration with the GREAT Campaign, Study UK and the British Council

May 2020

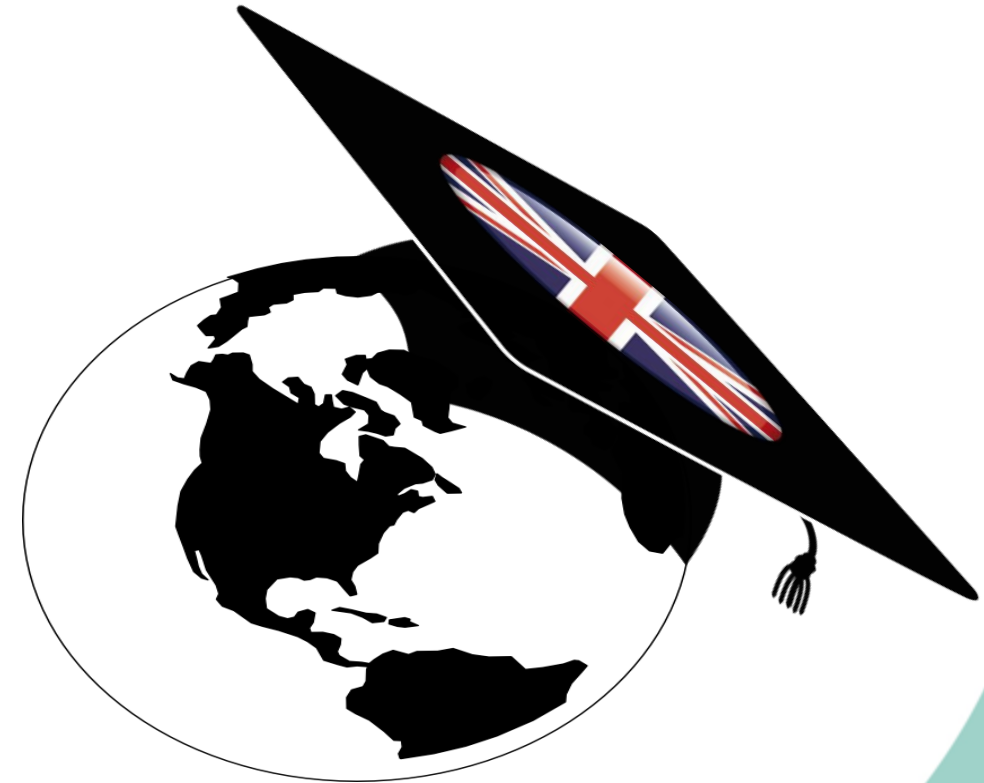
[Sample headline report](#)

Research  
**Stories** 

## Welcome - Introduction

- **The current document reports on the survey research that was undertaken on behalf of the GREAT campaign, Study UK and the British Council\***
  - This is the sixth annual wave
- **Distribution of the survey was facilitated by the British Council and participating UK HEIs**
- **The survey was targeted at new First Year (2019/20 academic year) International students starting a course at a UK HEI**
  - the main focus was non-EU (RoW) 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
  - Pathways: Access routes to their current course
  - Perceived impacts of Brexit
  - What's next after finishing the course?
  - **... and much more**

- UK HE market background**
- Objectives and methodology
- Respondent profile
- Motivations and segmentation
- Pathways
- International student decision-making
- Competitive position of the UK as a study destination
- Orientation to the UK

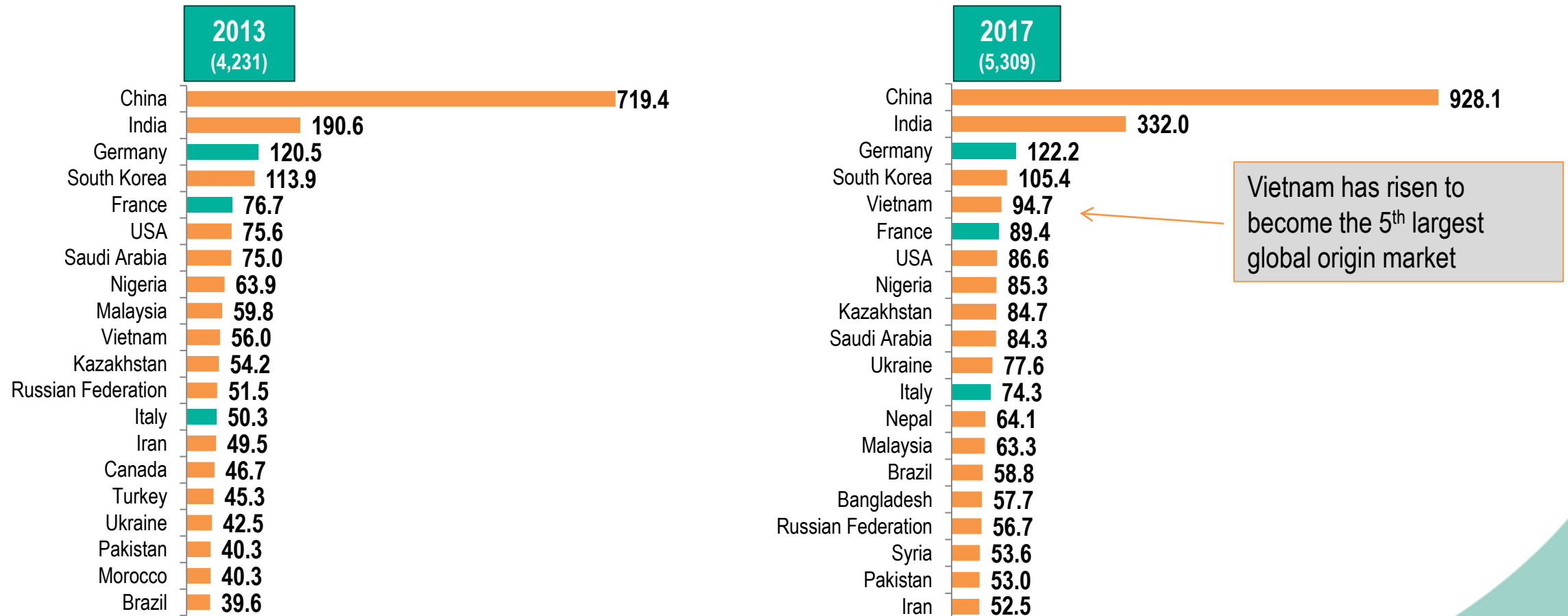


Insight	Implications
<p>Enrolled student numbers at UK HEIs from both EU and RoW continue to increase</p>	<p>The UK sector can continue to attract talented young people from all around the world. Post-Brexit it will have to increase its marketing investment in Europe to reinforce the message that the UK remains open and welcoming and offers a first class educational and cultural experience in an English speaking society.</p>
<p>The internationalisation of UK Higher Education remains dominated by China            ↳ ► China continues to increase its share of all first year international students</p>	<p>The UK HE sector is increasingly dependent on Chinese students, which exposes it to significant risk if bi-lateral political or trade relationships suffer a set-back. The sector needs to prioritise alternative markets including fostering renewed growth from India, targeting the large outbound market in South Korea and prioritising emerging countries such as Vietnam.</p>
<p>First year student numbers from India have risen sharply yr-on-yr in 2018/19 and visa data suggests that this trend will have continued into 19/20</p>	<p>The UK has turned a corner in India. The appeal of new PSW opportunities is a very powerful lever in the India market which can be used to increase student numbers from India exponentially.</p>
<p>While first year students number from top EU markets are stable (Germany) or declining (France, Italy), from some medium sized EU markets, numbers have grown by +25% yr-on yr in 2018/19 (Romania, Portugal)</p>	<p>To sustain growth, marketing to those EU countries with lower incomes/higher unemployment will have to adapt to the post-Brexit restrictions on freedom of movement. Messaging will need to emphasise the global benefits of a UK education, not simply the instrumental value of accelerated access to the UK labour market.</p>

## The global market for internationally mobile HE students expanded by 25% between 2013 and 2017

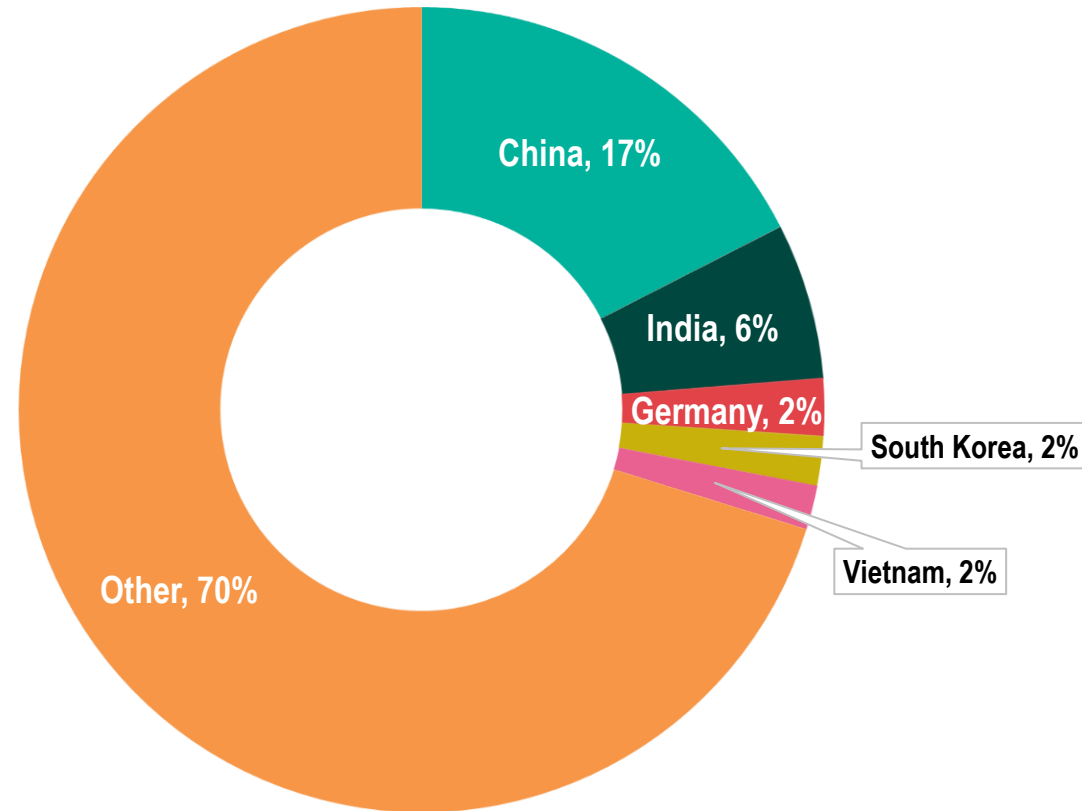
### Total outbound internationally mobile tertiary students by country of origin

Top 20 largest countries – 2013 and 2017 (EU countries marked in green, total in ('000s))



## Seventeen per-cent of all outbound internationally mobile students globally come from China

% of total outbound internationally mobile tertiary students by country of origin ('000s) in 2017

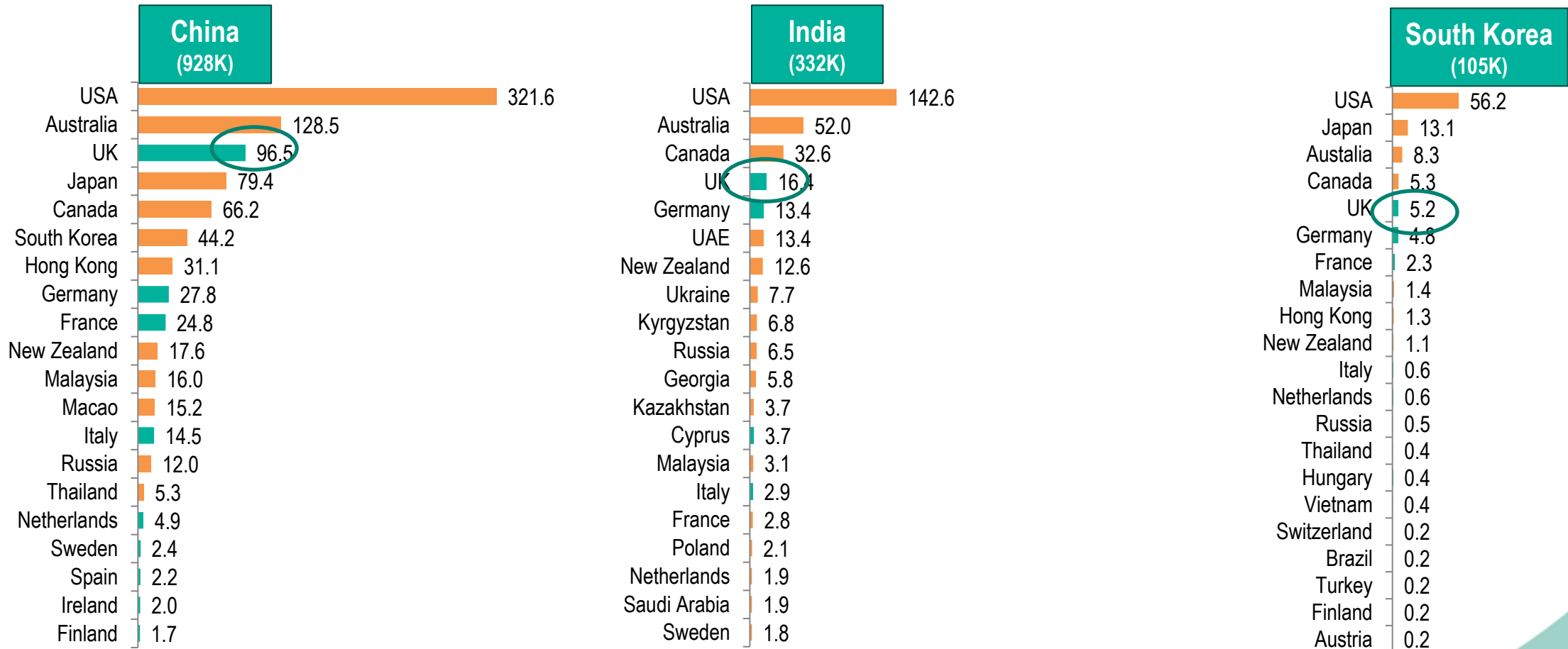


# India and South Korea are major global origin markets with untapped potential for the UK HE sector



## Top 20 largest destination countries – 2017

For HE students from the three largest non-EU origin countries (EU countries marked in green, total in ('000s))

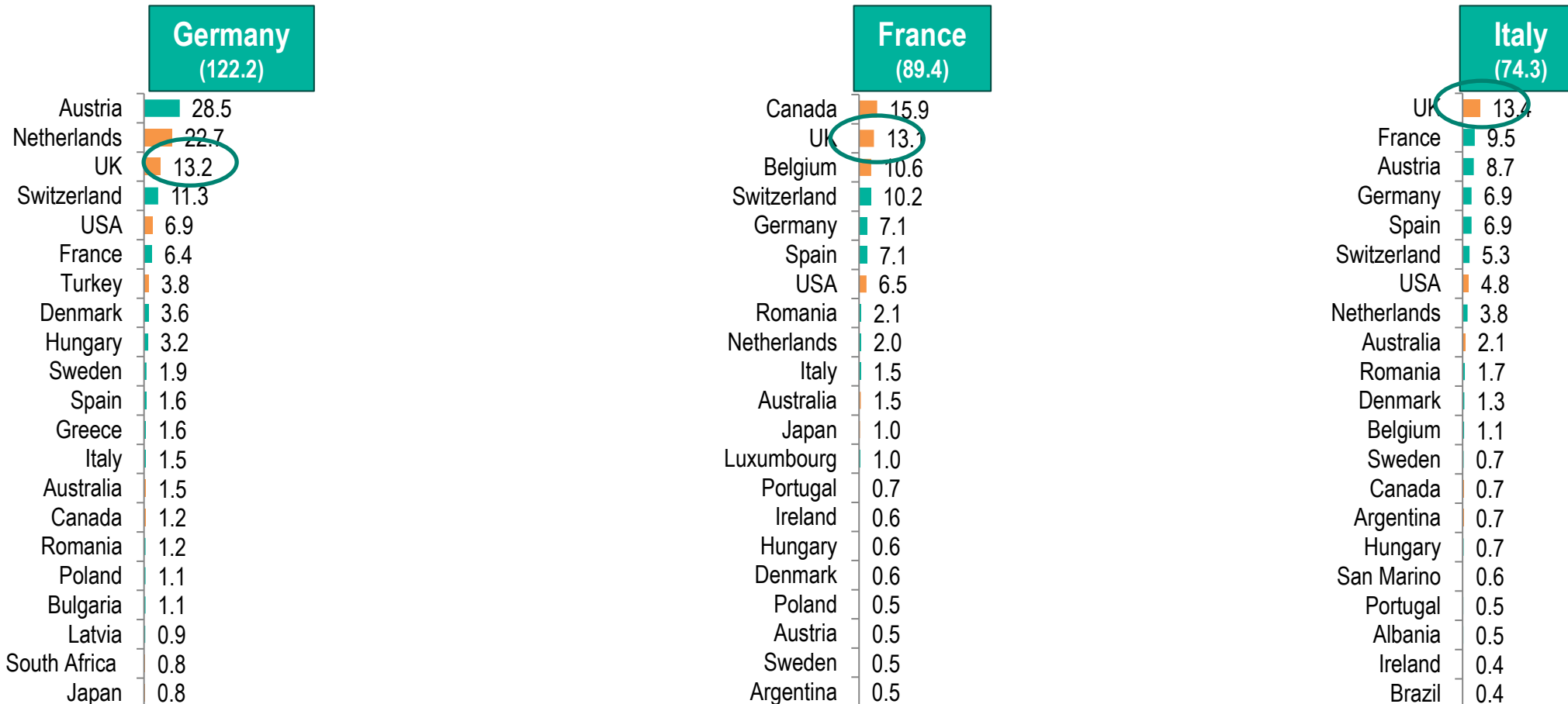


# Within the EU, Germany remains a major opportunity for expansion for the UK HE sector



## Top 20 largest destination countries – 2017

For HE students from the three largest EU origin countries (EU countries marked in green, total in ('000s))

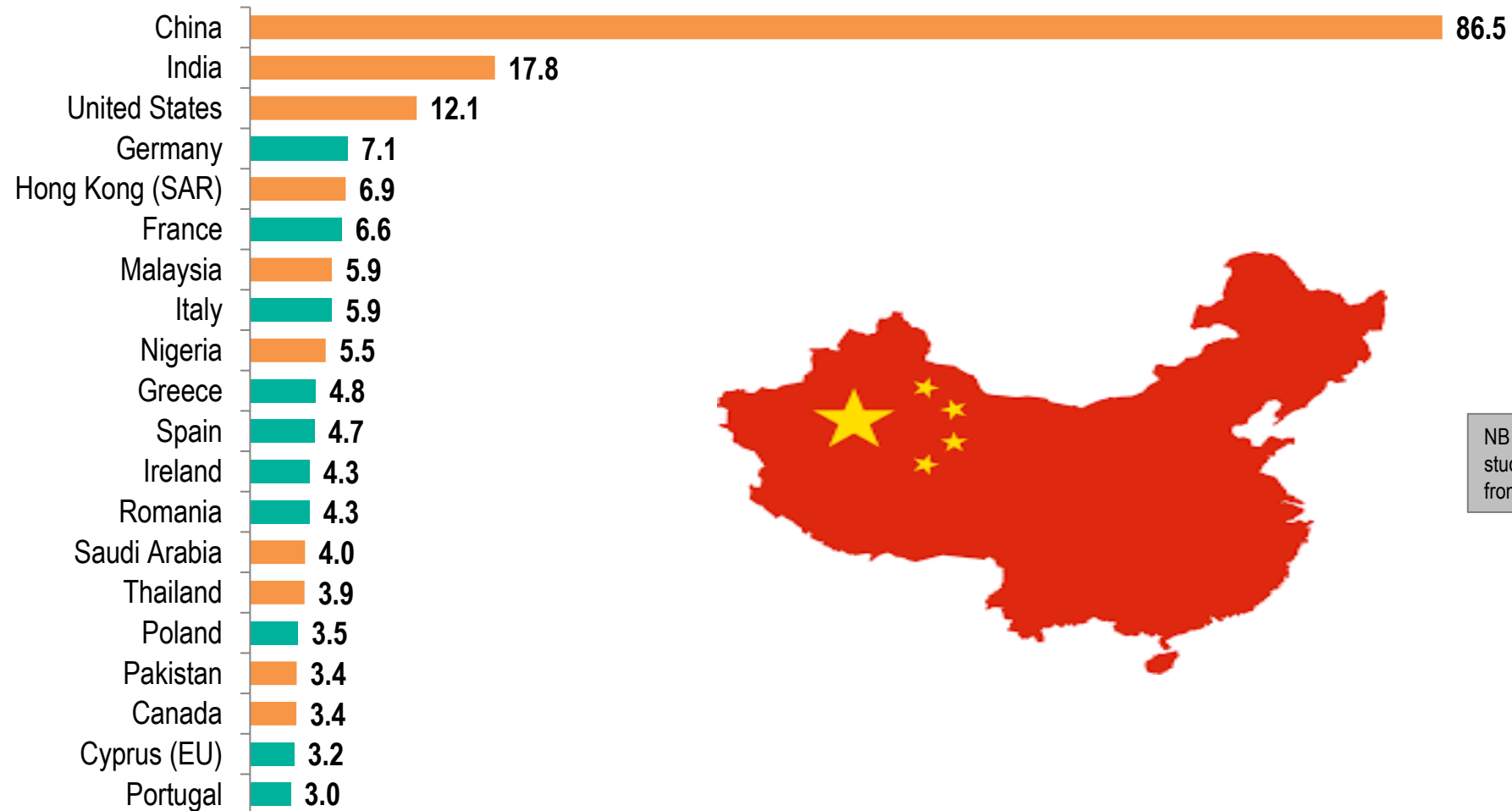




## The internationalisation of UK Higher Education remains dominated by China

Total number of 1st year international students enrolled in UK HEIs by domicile ('000s)

Top 20 largest countries (RoW countries highlighted in orange) – 2018/19

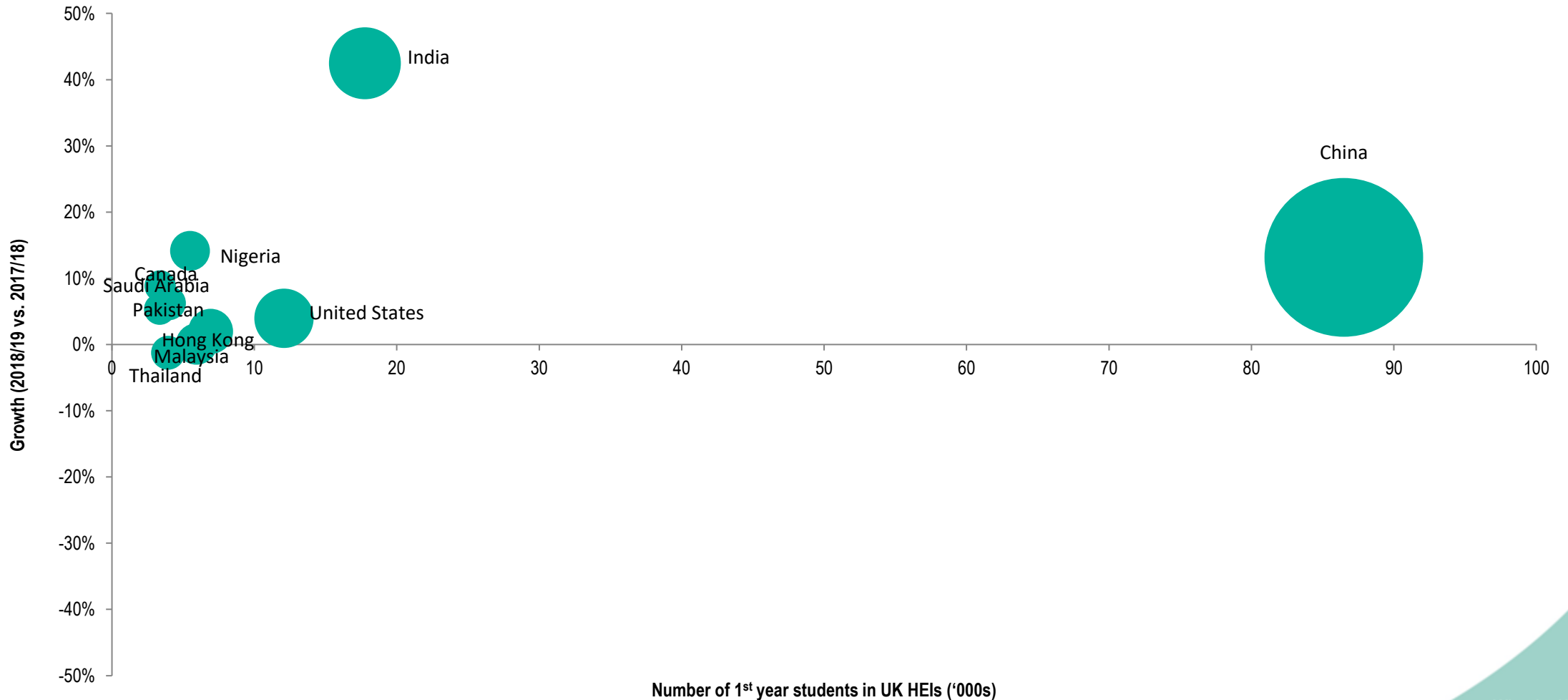


NB Number of exchange students from USA, excluded from this chart, is large

In 2018/19 China continued to increase its share of all first year international students in the UK while there was explosive growth in the number of students from India



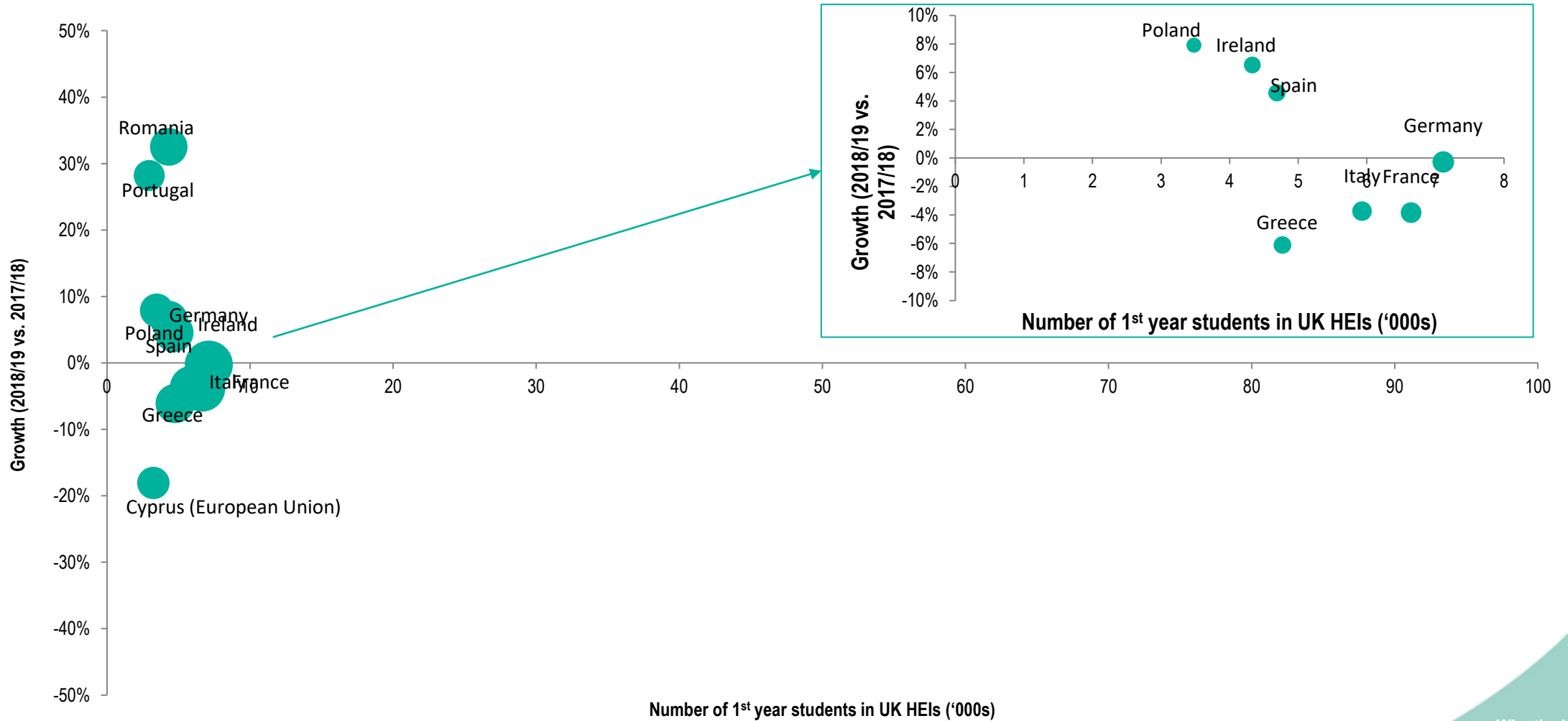
## Top 10 RoW countries: Size vs growth of first year students in UK HEIs (2018/19)



# From within the EU, student numbers in the UK from Romania and Portugal have increased rapidly while growth from Germany, Italy and France has largely stalled

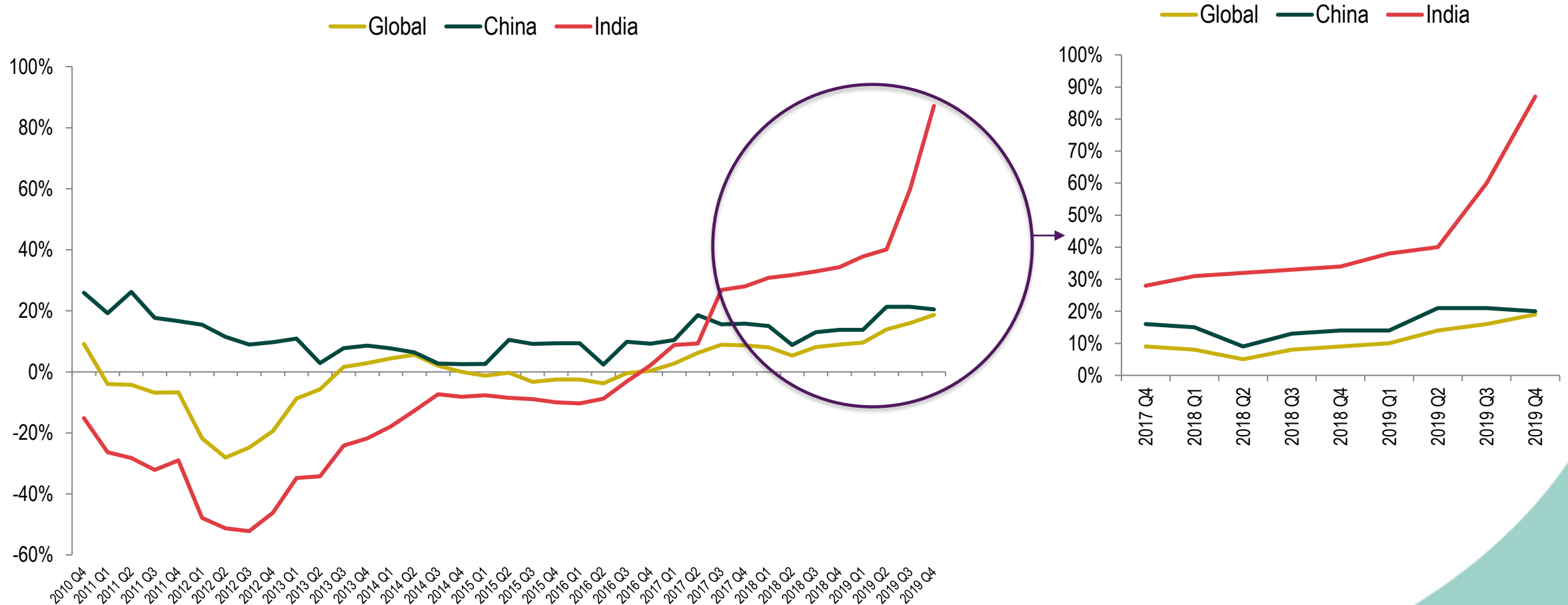


## Top 10 EU countries: Size vs growth of first year students in UK HEIs (2018/19)



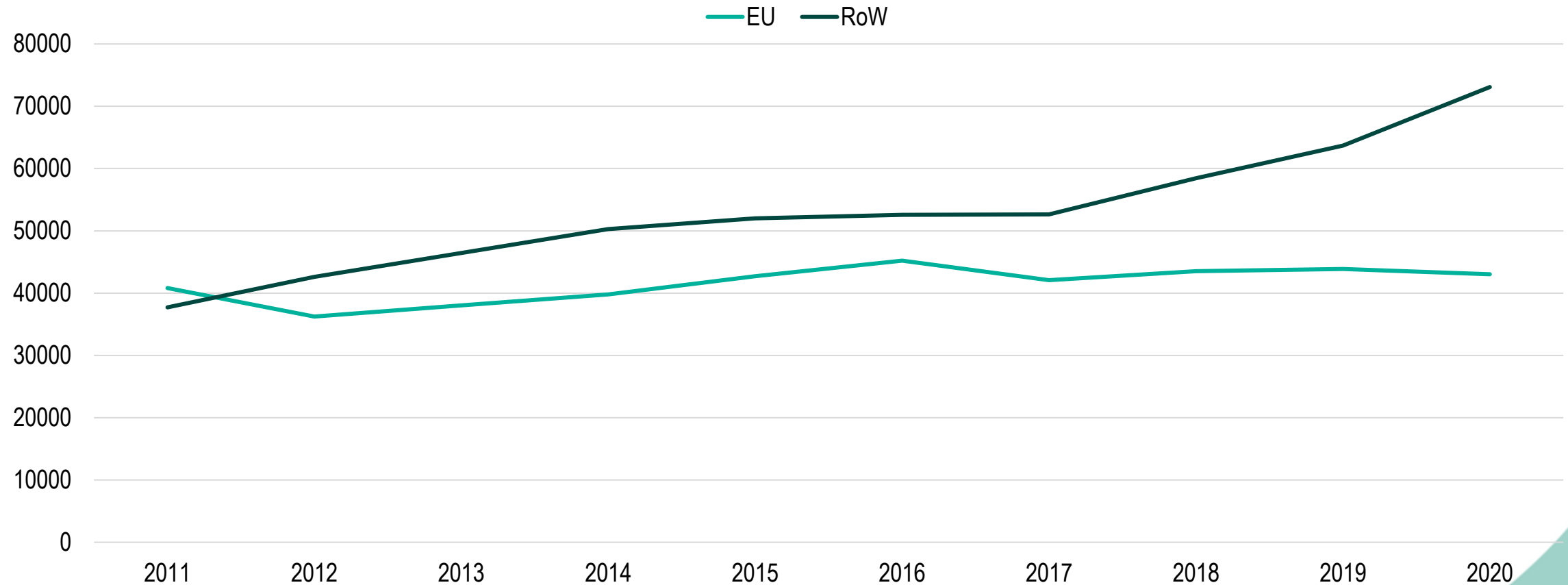
# Latest visa data suggests the major rebound in enrolments from India continued into academic year 19/20

## Tier 4 – General Student visas granted to UK HEIs (% change – last 4 qtrs divided by the same 4 qtrs one yr ago)



## UCAS data shows rapid growth in the number of non-EU students applying for UG courses

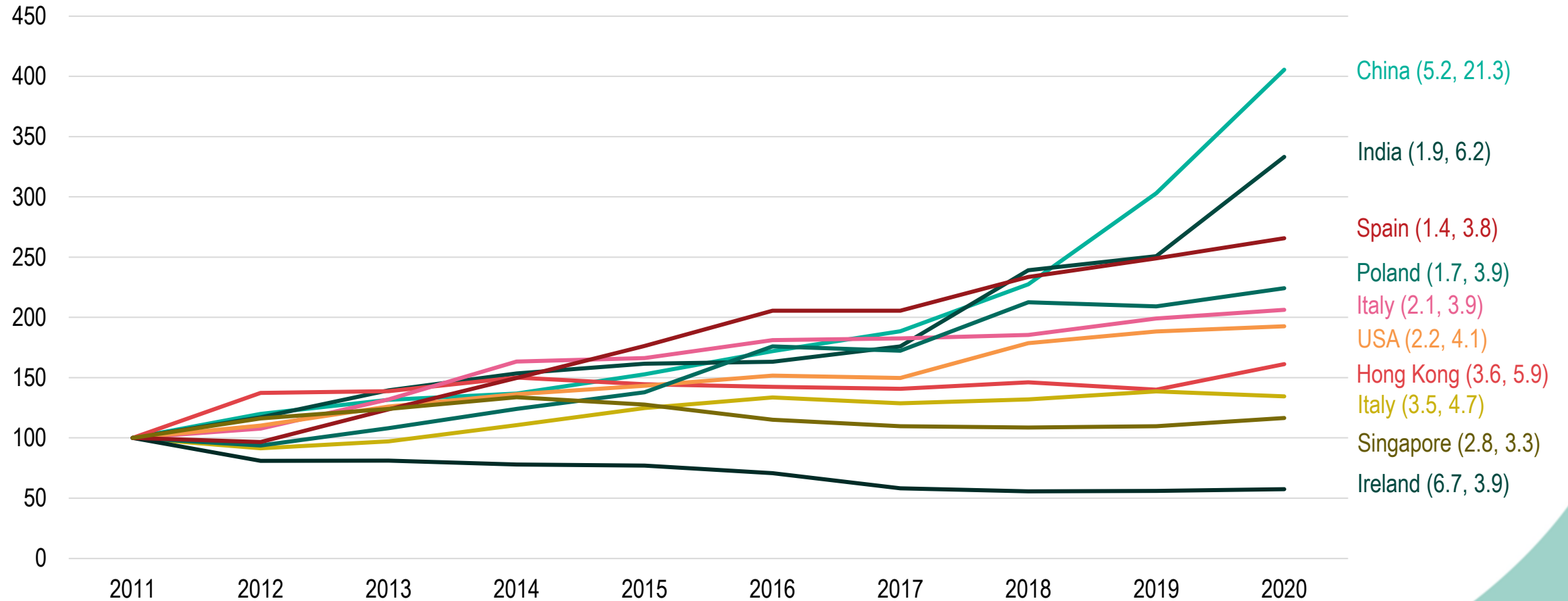
### Total number of UG applicants by UCAS cycle By domicile



## Since 2011 the number of UG applications from China has more than quadrupled

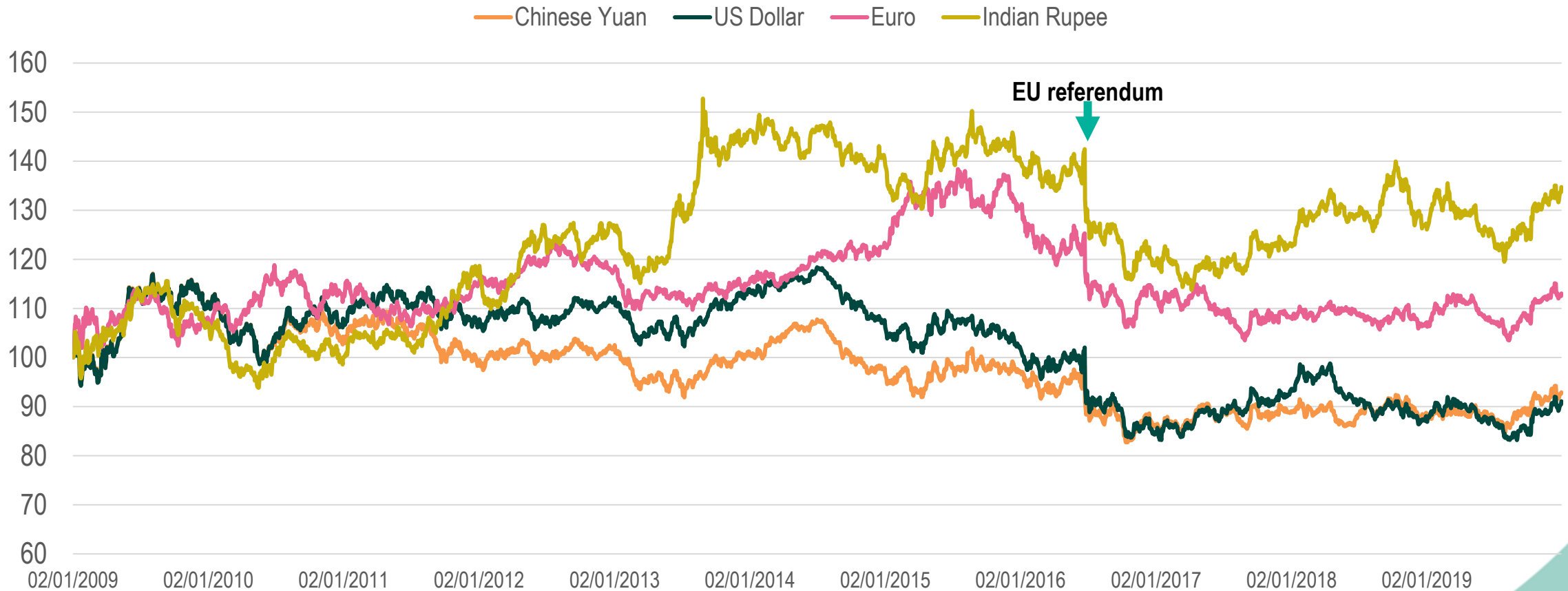
### Top origin countries\*: UG applicants by UCAS cycle

Index = 2011, total number ('000s) of applicants for 2011 and 2020 in (,)



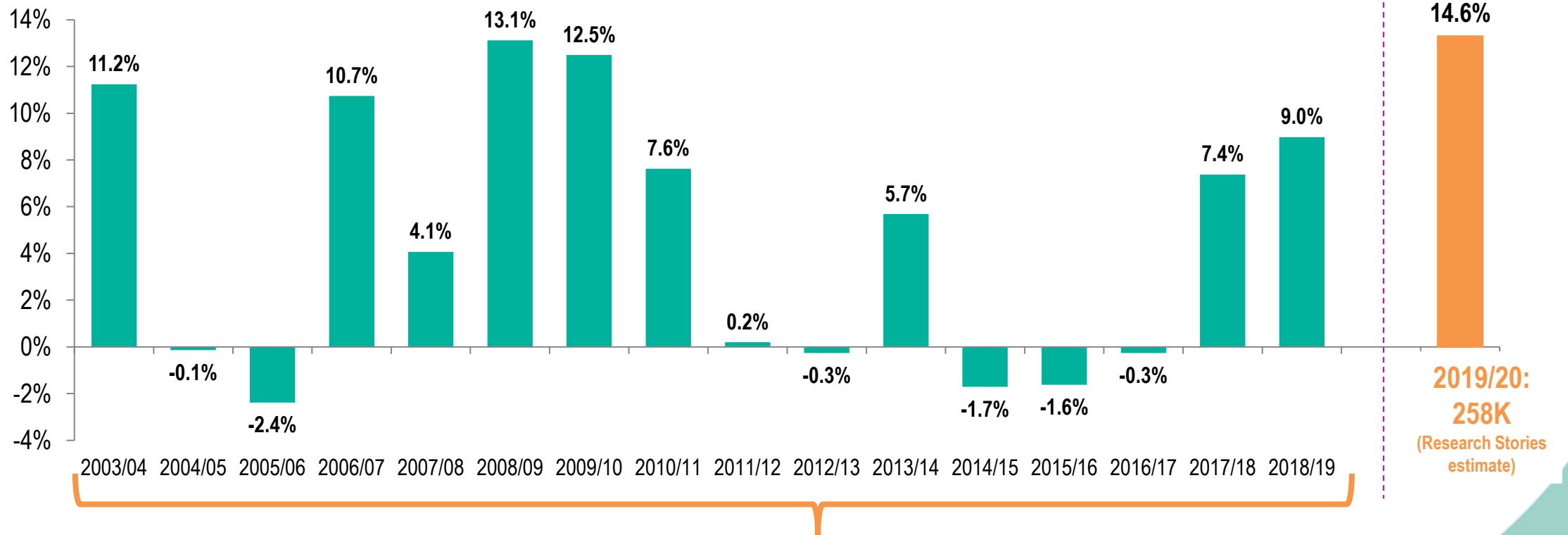
## The weakness of sterling after the Brexit referendum has given a major competitive boost to the UK's recent recruitment of international students

**Spot exchange rate of Sterling (GBP) against:**  
Index = 2nd January 2009



# Estimate for 2019/20: the number of first year RoW students starting at a UK HEI increased by 14.6% to 258K

## Annual % growth in the number of First Year RoW students

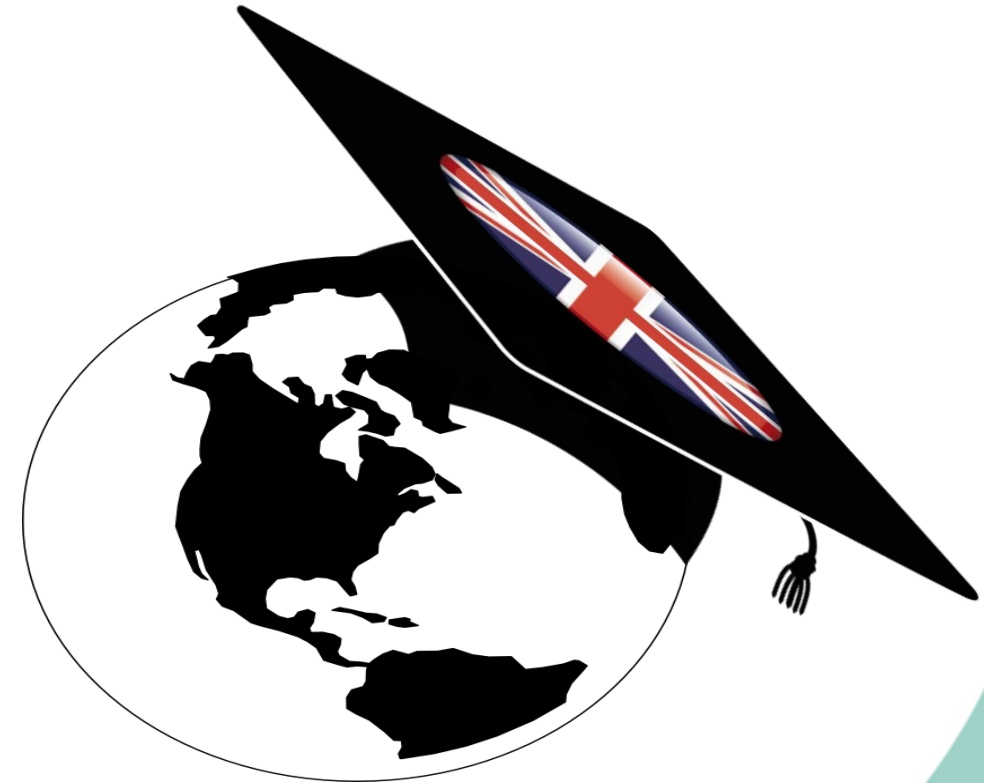


Official HESA data available as of now



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- UK HE market background
- Objectives and methodology**
- Respondent profile
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- **This research aimed to explore**
  - ... the customer journey and motivations of international students coming to study in the UK
  - ... the importance of various access pathways into the UK higher education system
  - ... the range of influences on the decision to choose the UK
  - ... the UK's perceived competitive advantage
  - .... potential effects of Brexit



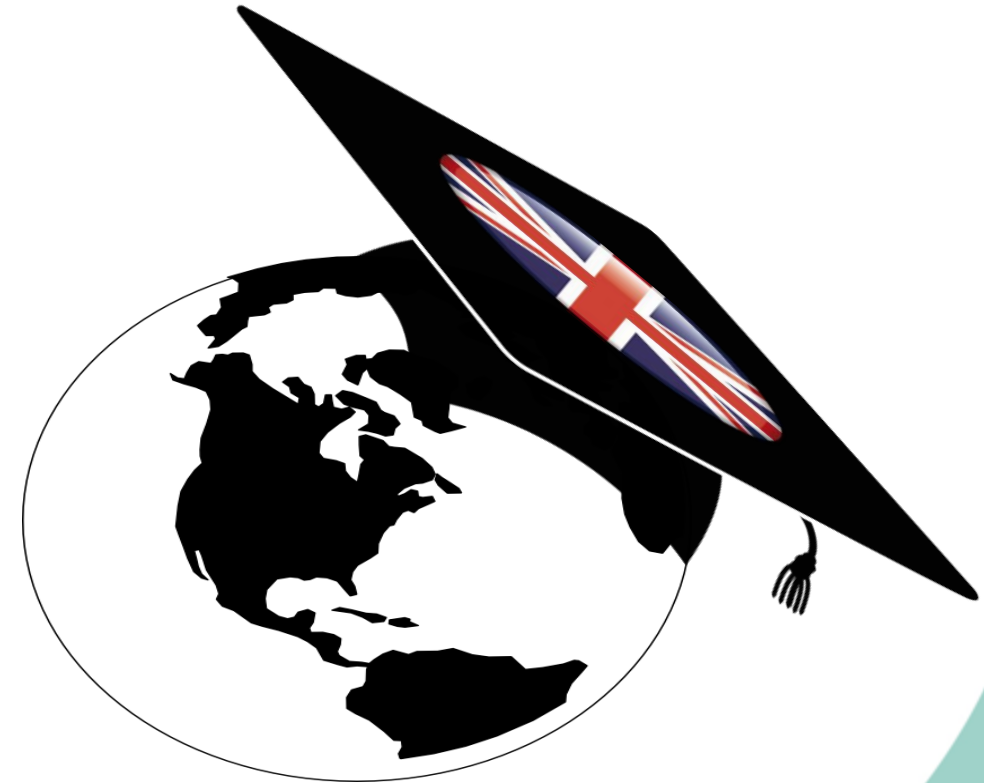
# Methodology

- **Online questionnaire distributed to first year international students at a UK higher education institution (HEI)**
  - Each HEI is provided with a unique web link to the questionnaire
  - Local IOs distribute the link to their own first year international student - targeting both UGs and PGs
- **48 UK HEIs facilitated the research**
- **3,279 valid responses received from first year students registered as international students at their HEI**
  - Respondents asked for verifiable details to ensure legitimate student status
    - Those starting at their current institution prior to 2018/19 academic year excluded
    - Duplicates and responses without legitimate student details excluded
  - Highest respondent numbers from China, India, Germany, USA
- **Definition: new International students**
  - Non-UK citizens (a small share, 2% of dual-UK citizens are also included)
  - New to their UK HEI in the 2019/20 academic year
- **Fieldwork by Research Stories: Nov 2019– March 2020**
- **Other than respondent demographics, data presented in this report is weighted to represent the distribution of all new (First Year) international students as reflected in HESA Statistics 2018/19**
- **Data is weighted to reflect the mix of:**
  - UG vs PG students
  - RoW vs EU students
  - Top 5 RoW origin countries
  - Top 5 EU origin countries

The weighting means that data presented in this report is representative of all international students across GB

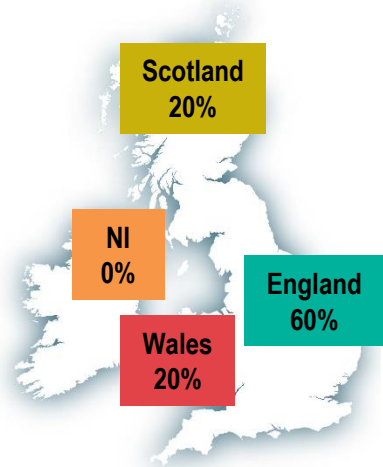
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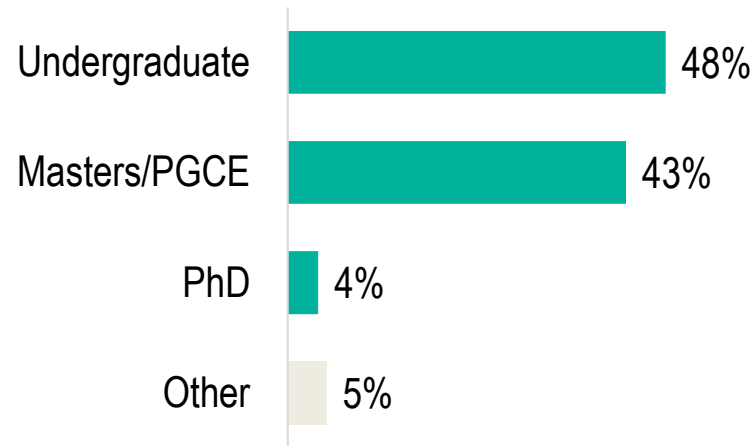


# Respondent profile – Demographics

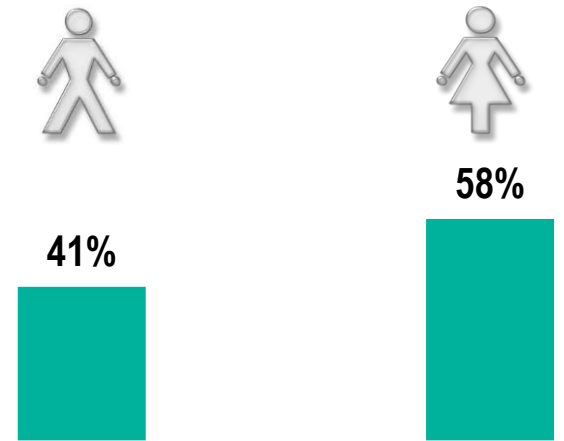
## Location of HE institution



## At what level are you studying?

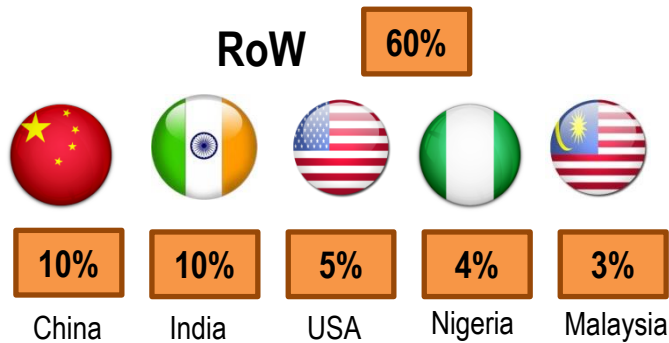


## Gender

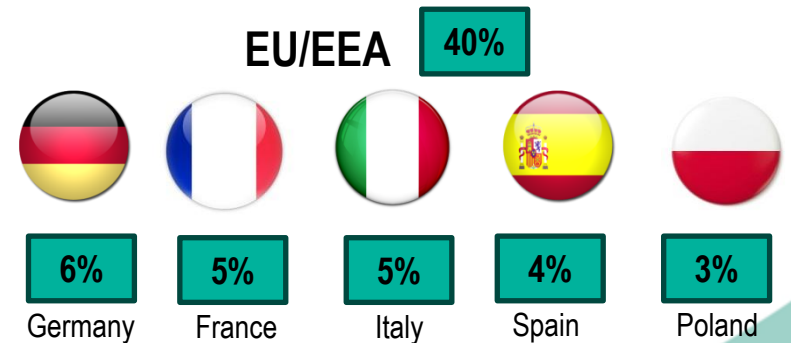


## Of which country are you a citizen?

### Top5 RoW sending countries



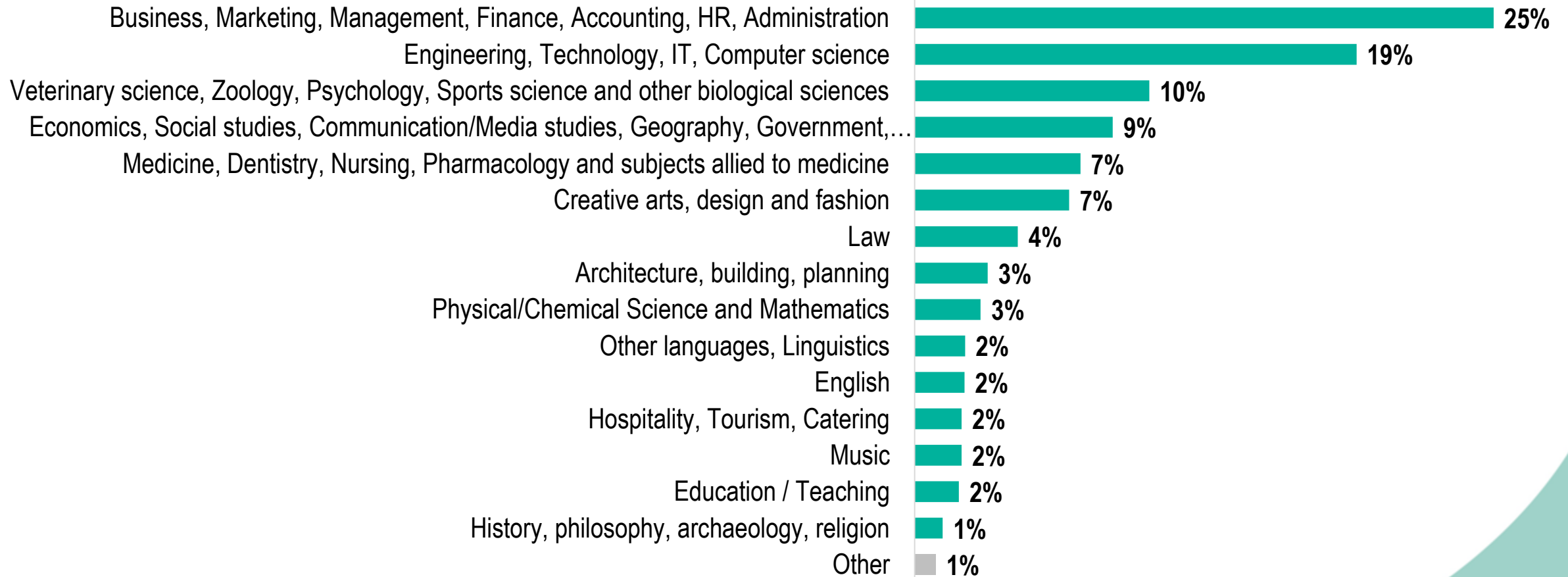
### Top5 EU/EEA sending countries



## A quarter of respondents are currently studying a Business course

### What are you studying in the UK?

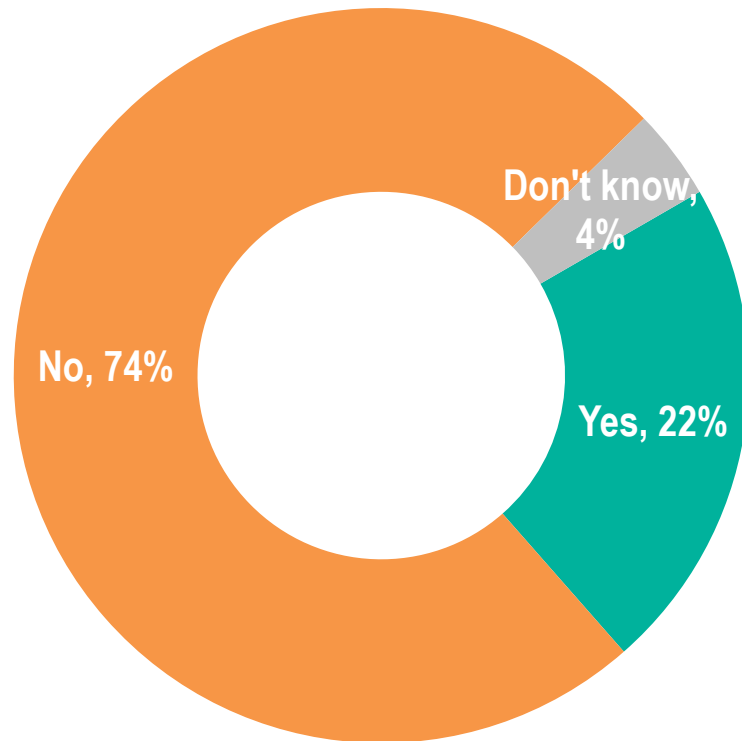
#### Overall



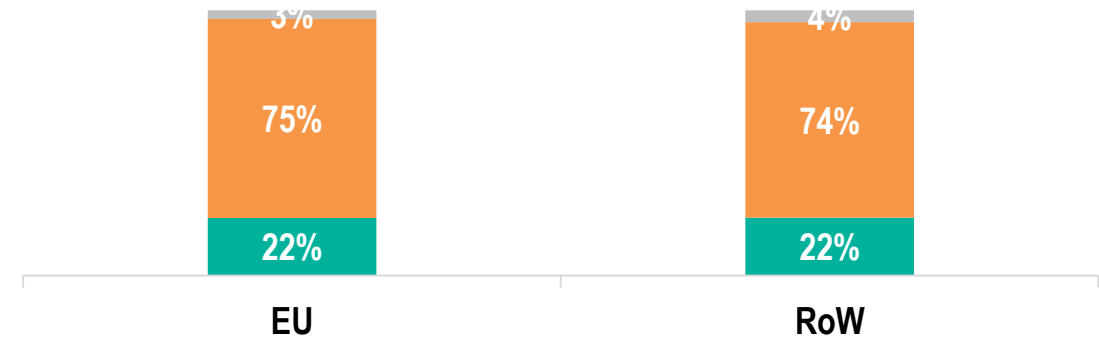
## More than one in five respondents are on an exchange or TNE programme

Is your current course in the UK part of a course/programme you started outside the UK? (e.g. an exchange programme or International/Trans-National Education –TNE - programme)

Overall



...and by citizenship



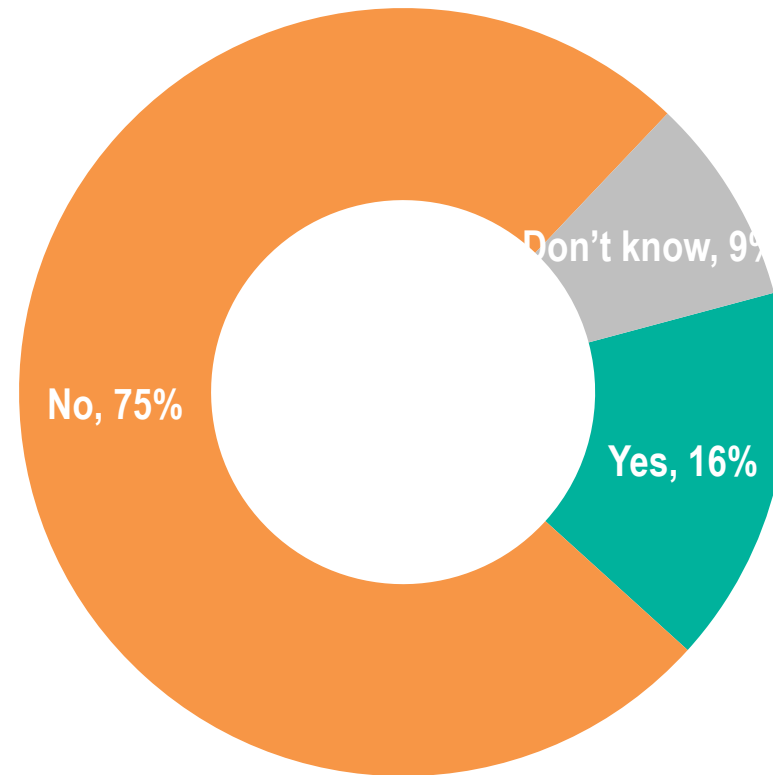
...and by level of study



## Around one in six EU respondents are on an Erasmus programme

Is your current course in the UK part of an Erasmus programme?

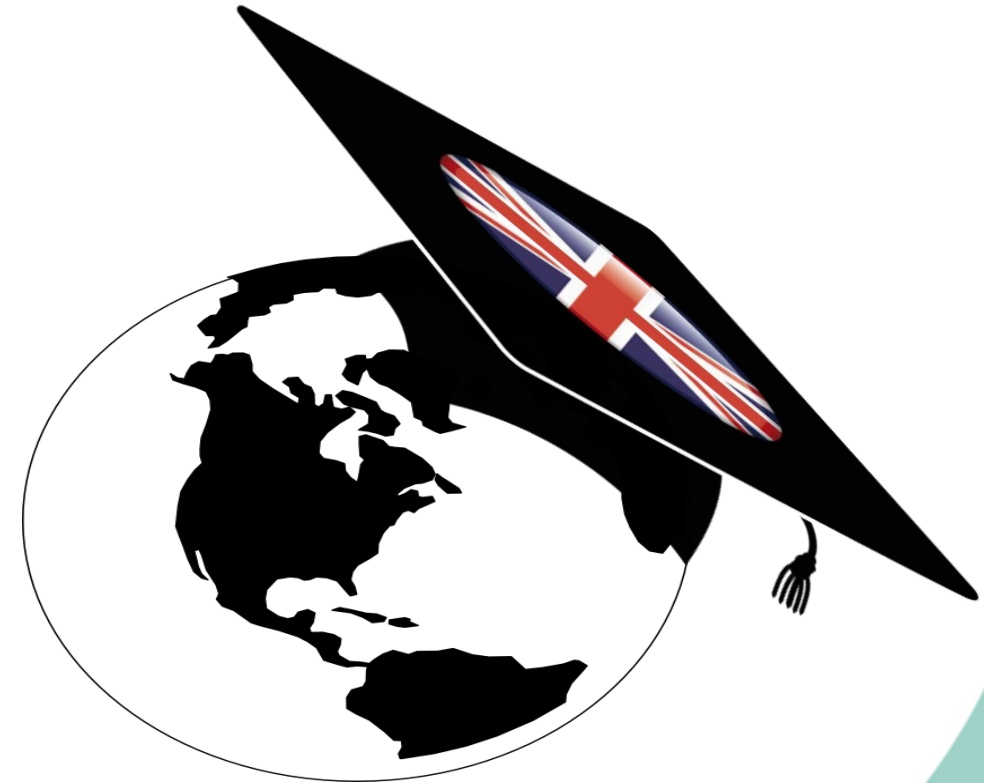
Overall - New EU students only





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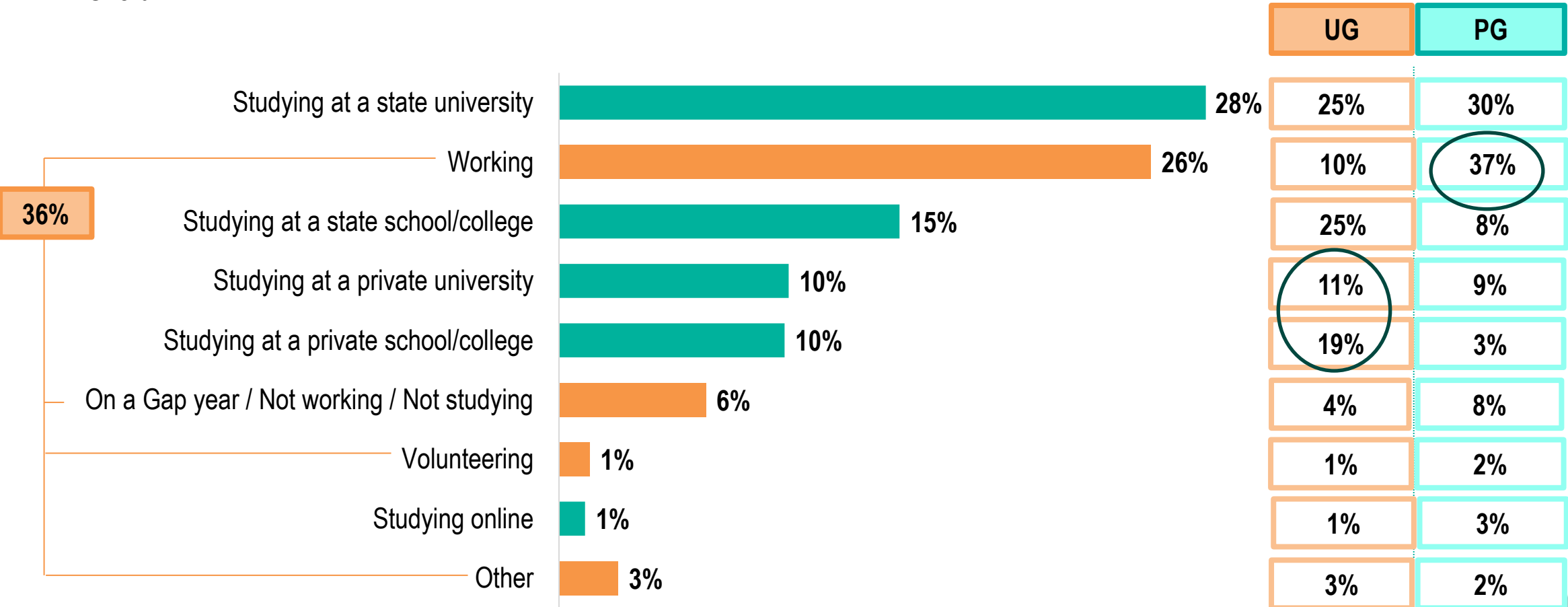
Insight	Implications
<p>More than a quarter of new international students have come to the UK from a position in employment rather than directly through the education system</p>	<p>Through digital marketing, the sector can dramatically widen its reach to include more young people in employment in target markets. Messaging, especially around business courses and STEM, needs to emphasise the benefits of a UK education on employability, career progression and global employment opportunities.</p>
<p>More than one quarter of new international students were already in the UK in the prior academic year</p>	<p>The sector has a 'captive' market already in the UK accounting for one quarter of the new intake. Building relationships with schools – especially independent schools – can support the pipeline of new UG students while converting final year UGs into PGs, especially UGs already studying at the HEI, is the lowest cost/risk route to generating new demand.</p>
<p>20% of new international students have previously studied at an out-of-school English language centre in their home country, 12% with an ELT provider in the UK and 12% have studied for at least one year at a secondary school or college in the UK</p>	<p>Potentially almost half of all new international students have some prior institutional link to the UK and/or English language. Building relationships with English UK providers, ELT providers internationally, international schools and indeed schools in the UK can allow the sector to communicate the benefits of a UK education to potential students long before they and their parents make the final decision of whether/where to study internationally.</p>
<p>A small (7%), but potentially rapidly growing number of new international students have previously taken a MOOC provided by a UK HEI</p>	<p>MOOCs represent an increasingly important and relatively low cost marketing channel. They build HEI brand awareness globally, support the UK sector's brand values and in a small, but growing number of cases, act as a direct pathway to full application to study in the UK.</p>

## More than a third of new international students were not in education in the last academic year; Nearly one third of new international UG students were in private education in the last academic year

### What were you doing mainly in the last academic year 2018/19?

#### Overall

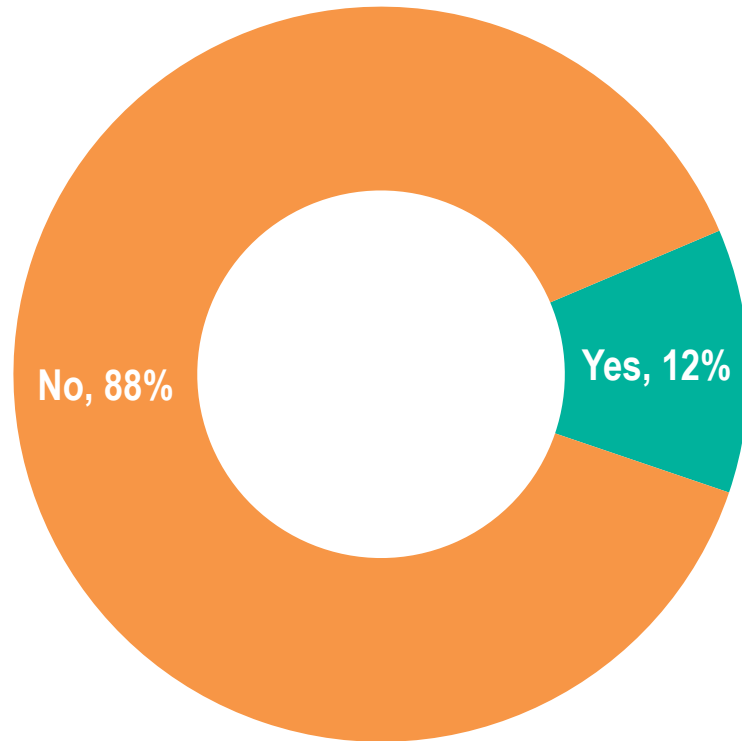
#### ...and by level of study



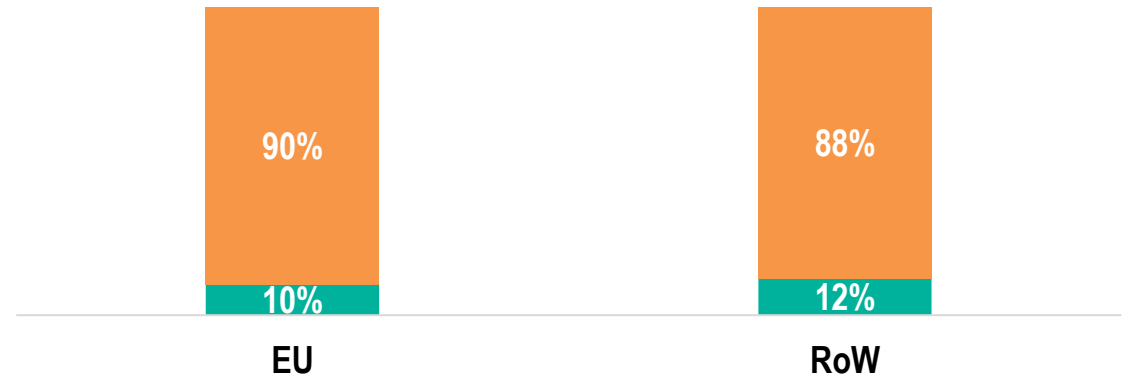
## More than one in ten new international students have studied at a UK secondary school or sixth-form college

Have you ever studied for a year or more at a secondary school/college or at a sixth-form college in the UK?

Overall



...and by citizenship



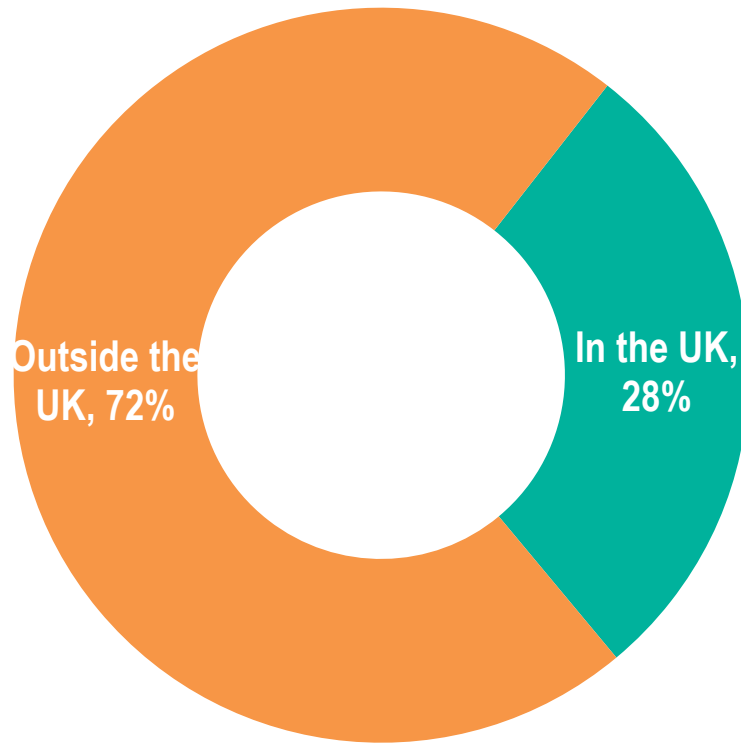
...and by type of university



## More than a quarter of new international students were already in the UK in the year prior to starting their current course

During the last academic year 2017/18, were you mainly living/studying in the UK or outside the UK?

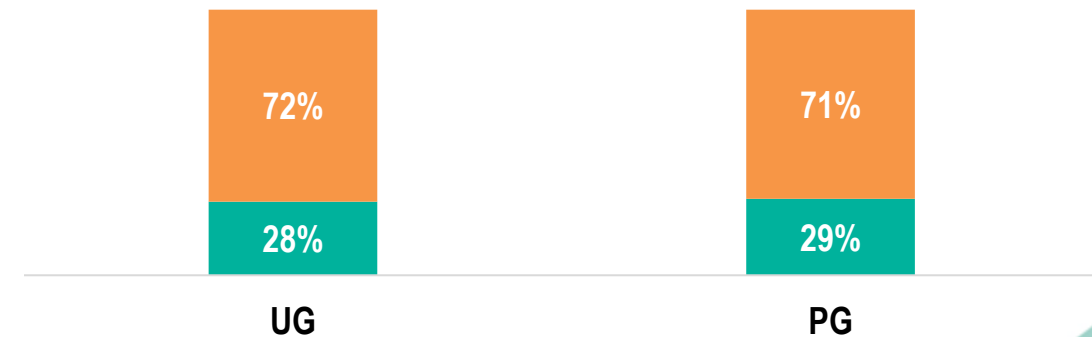
Overall



...and by citizenship



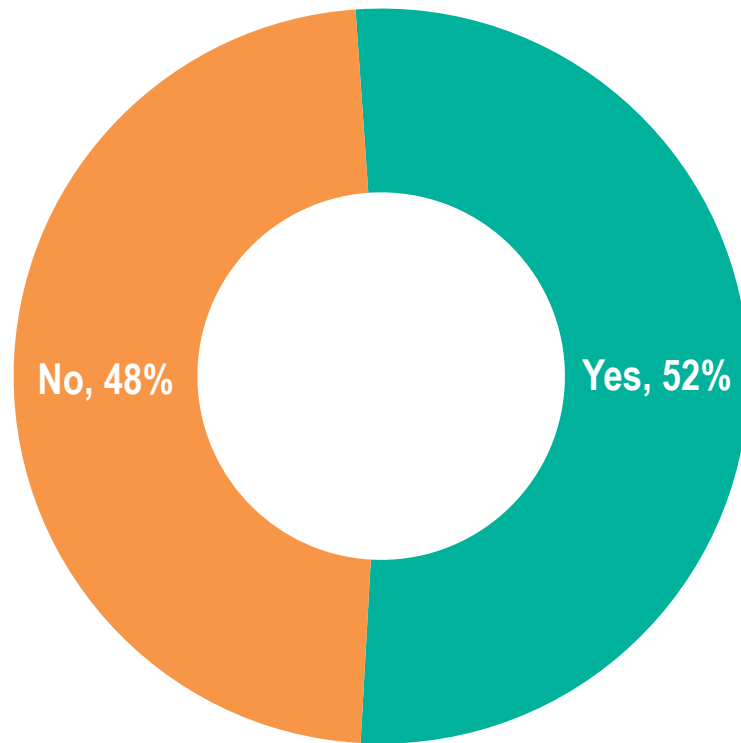
...and by level of study



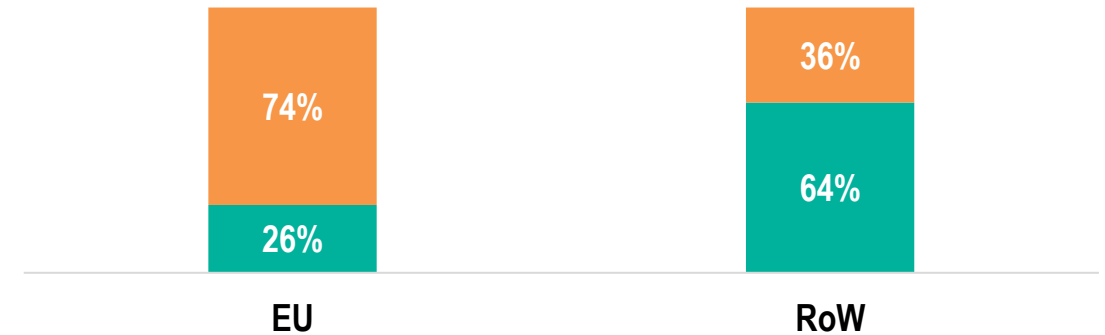
## More than half of new international students who were previously in education outside of the UK in non-English speaking countries were already studying in English

Was English the main language of instruction of your course or school in the last academic year 2018/19?

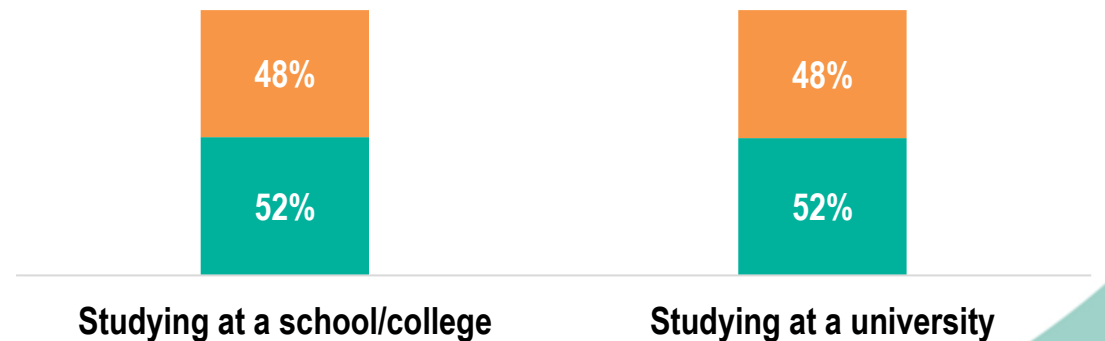
New international students who were previous in education outside of the UK and from non-English speaking countries\* only



...and by citizenship



...and by where they were previously studying

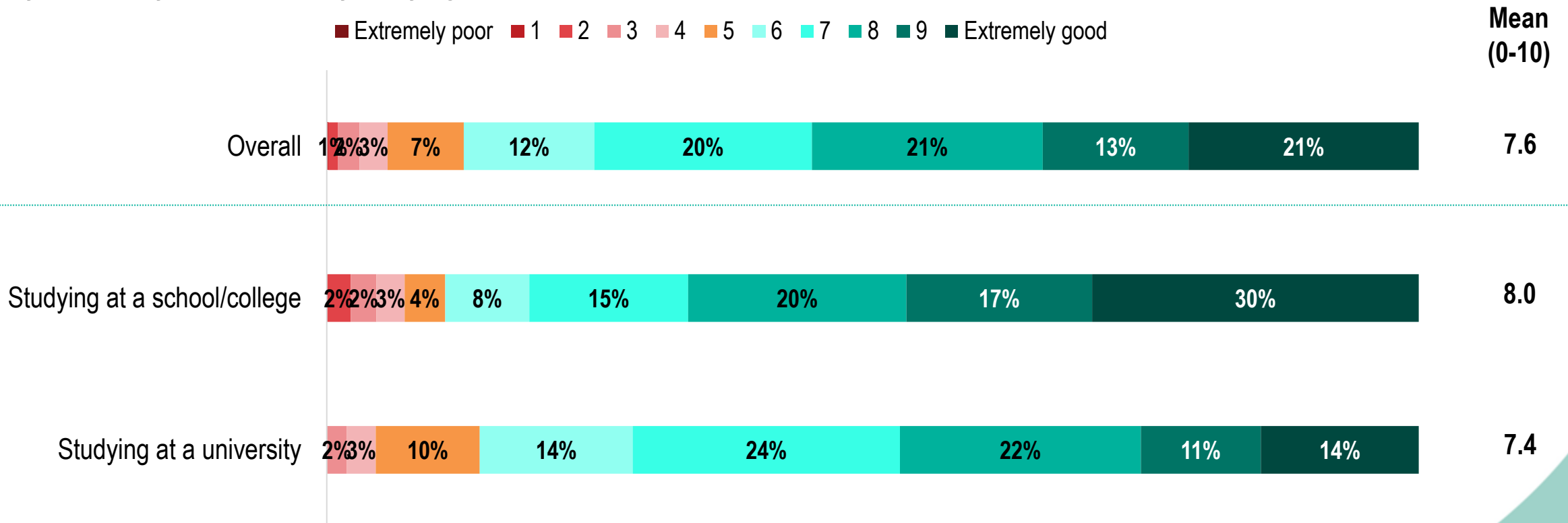


## New international students are generally positive about the quality of their previous EMI

### How do you rate the quality of English Medium Instruction (EMI) in your last course or school?

New international students who were previous in education outside of the UK who were studying in English and from non-English speaking countries\* only

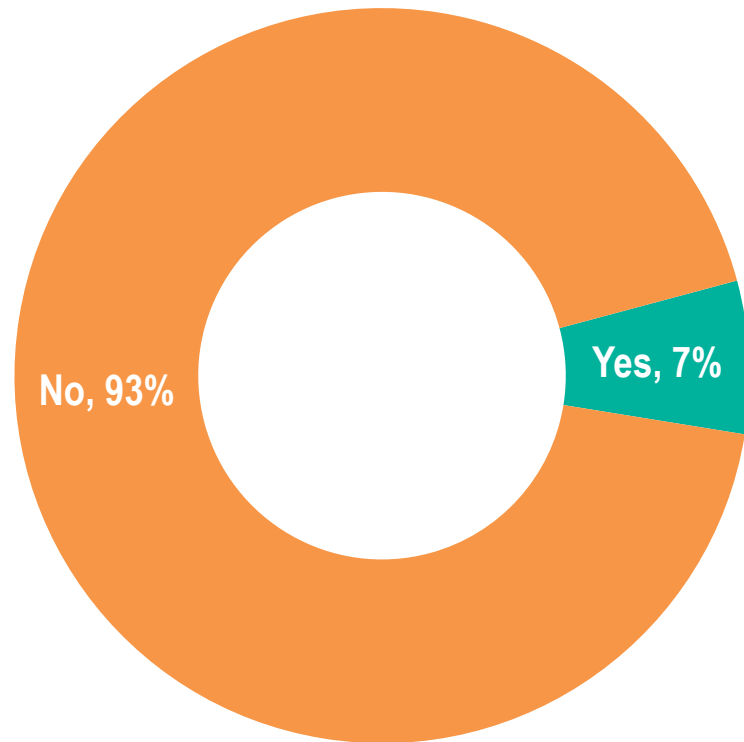
By where they were previously studying



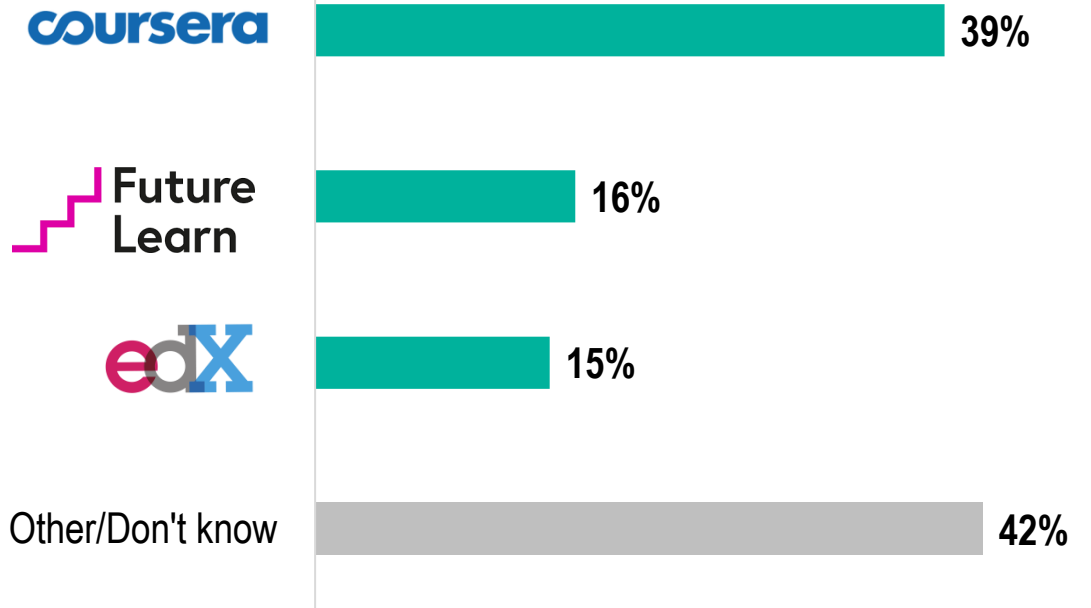
## Seven percent of new international students have previously taken an online course or MOOC run by a UK institution

Have you previously taken any online course or MOOC with a UK university or institution?

Overall



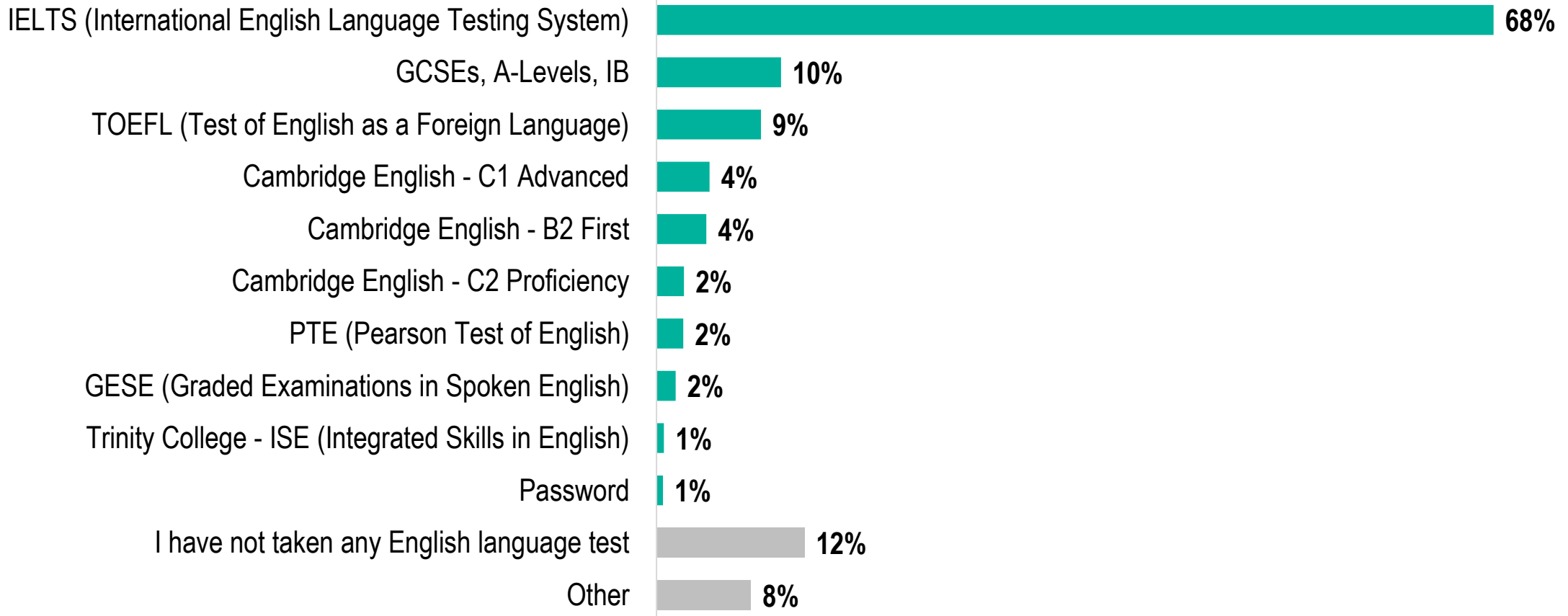
Who provided the platform/access for this online course or MOOC? - Please select all that apply.





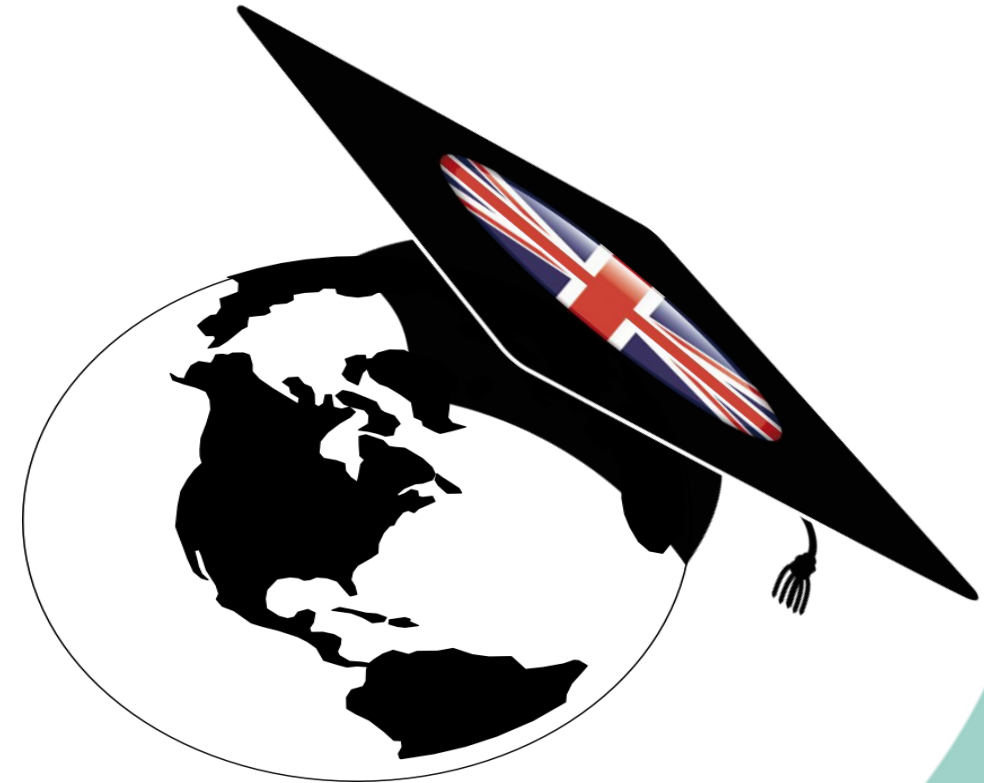
## IELTS is by far the most common English language test taken by international students pre-study

Have you taken any of the following English language examinations? - Please select all that apply.  
(Base: new international students from non-English speaking countries\*)



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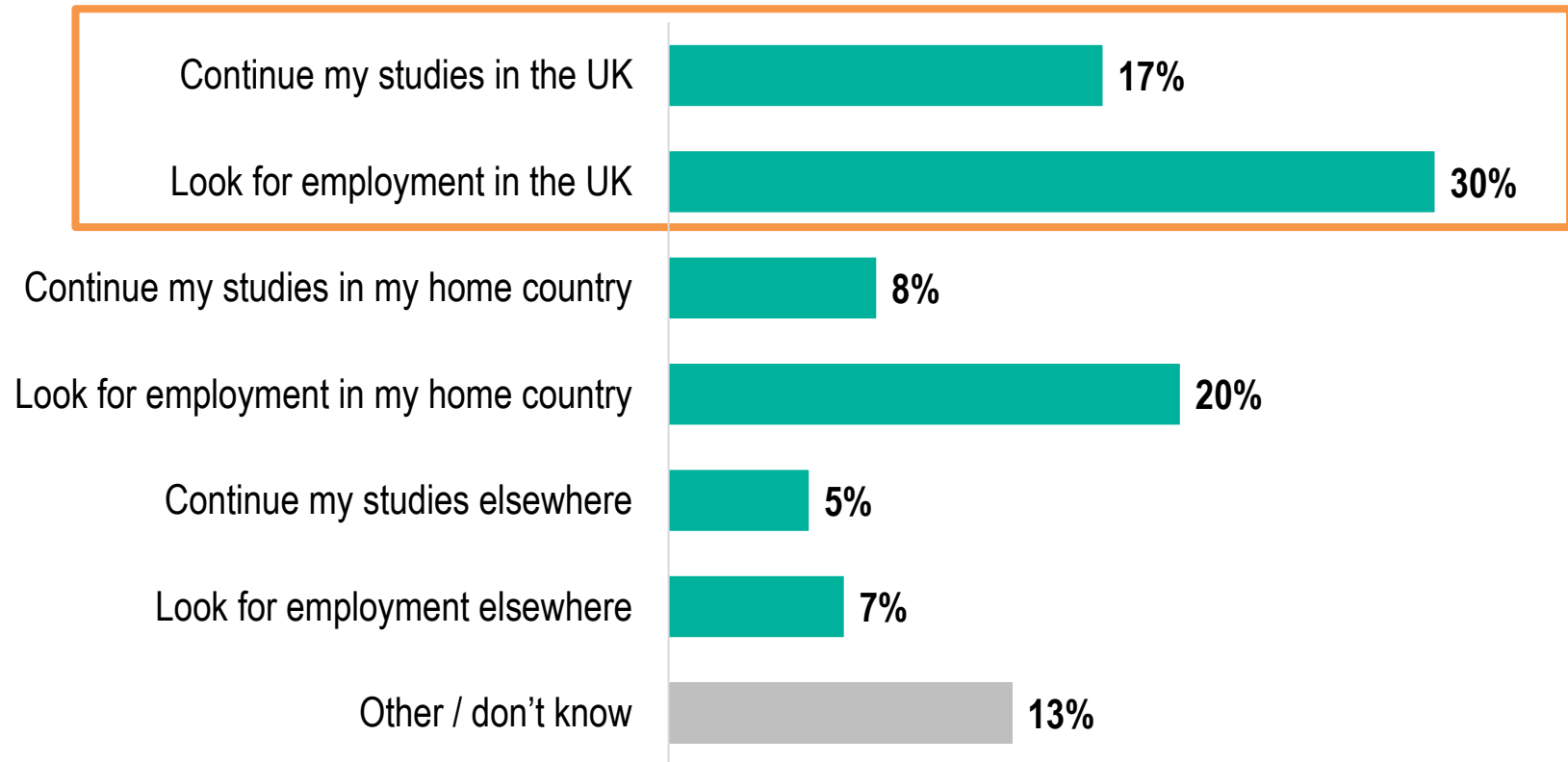
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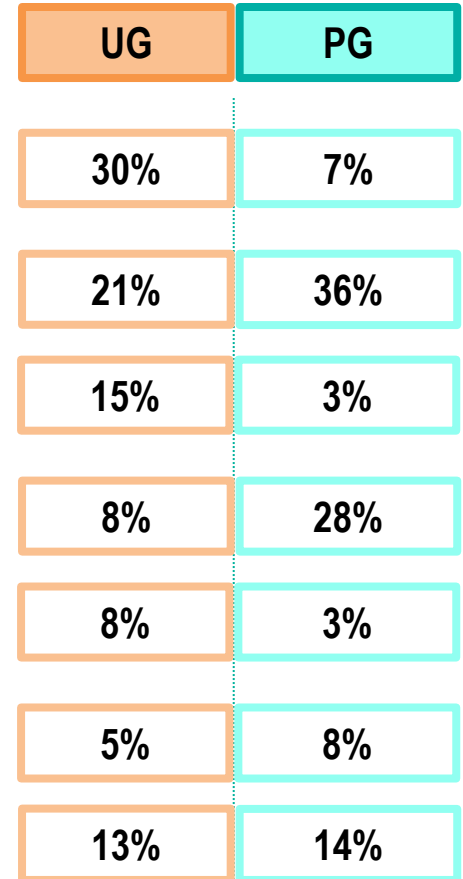
Insight	Implications
<p>Nearly half of new international students wish to stay in the UK after completing their current course</p>	<p>The sector should continue to target international UG students, who are the 'low hanging fruit' to attract into PG courses. The new PSW regulations can be used to bolster the appeal of PG courses to the many international students wishing also to gain work experience in the UK.</p>
<p>One third of new international students aspire to be living and working/studying in the UK in five years' time</p>	<p>The culture of the UK – it's lifestyle, language, cultural attractions and employment opportunities - retains a huge appeal to international students which needs to be emphasised alongside the educational opportunities.</p>
<p>Brexit has had the biggest negative impact on the perceptions of new international students about opportunities to work in the UK after graduation and about the UK as a country with a global outlook</p>	<p>Communicating the new PSW regulations can be used to counter negative perceptions about access to employment but the sector will need to work with cross government agencies to counter the wider, and in the longer term potentially more damaging, impact of Brexit on the UK's global brand values.</p>
<p>The differential impact on perceptions among new RoW students and new EU students is increasingly stark; in general, among RoW students Brexit has had a small positive impact on perceptions but among EU students the impact is increasingly negative</p>	<p>Messaging to EU students will need to shift away from access to employment to the benefits of a globally relevant education, cultural opportunities and exposure to the English language.</p>

## Nearly half of new international students wish to stay in the UK after completing their current course

### What do you plan to do after finishing your current course? Overall

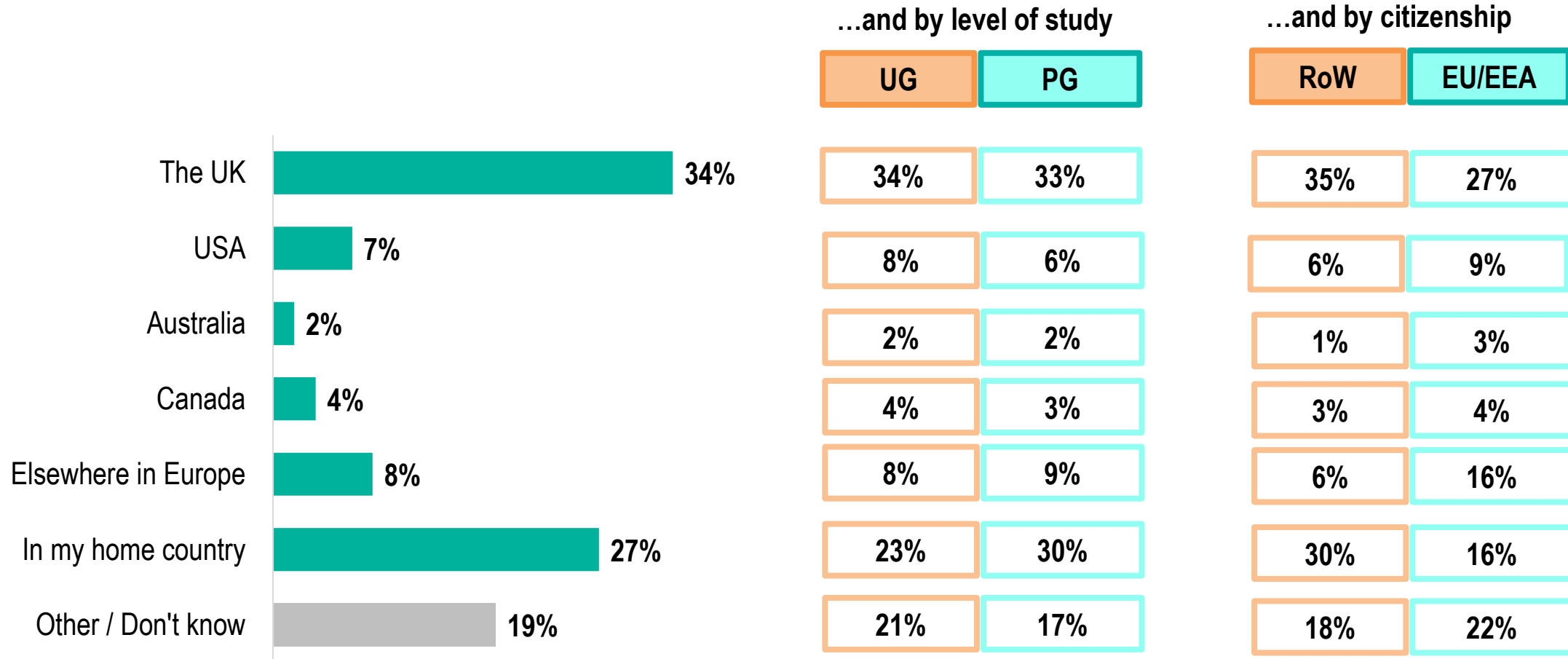


### ...and by level of study



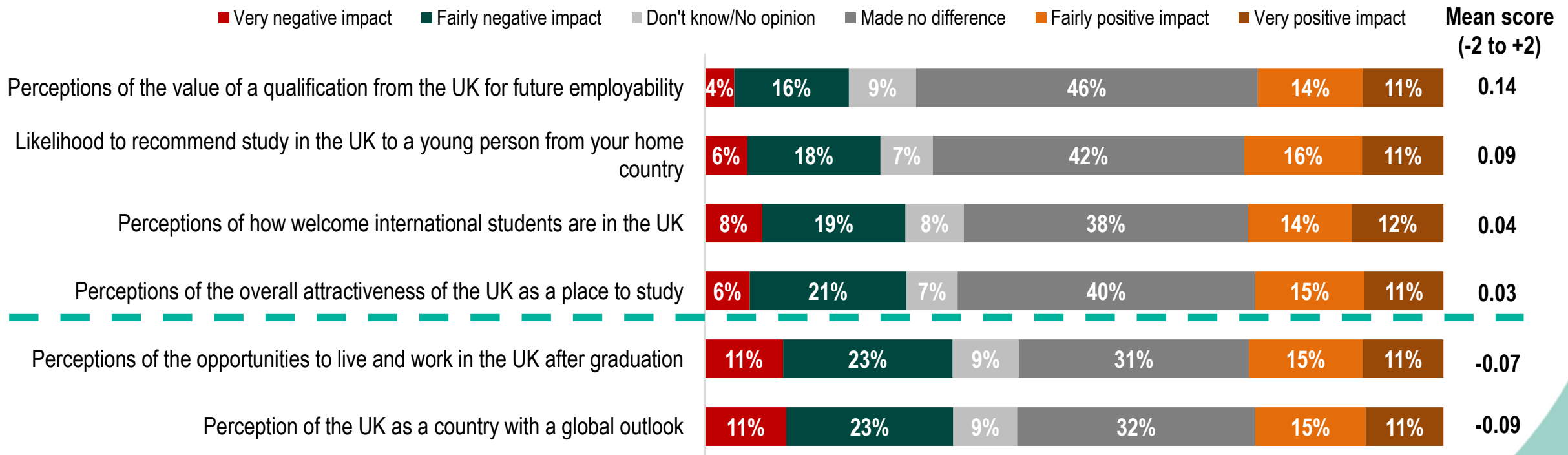
## A third of new international students would like to be living in the UK in five years time

Ideally, where would you like to be living and working/studying in five years time?  
Overall



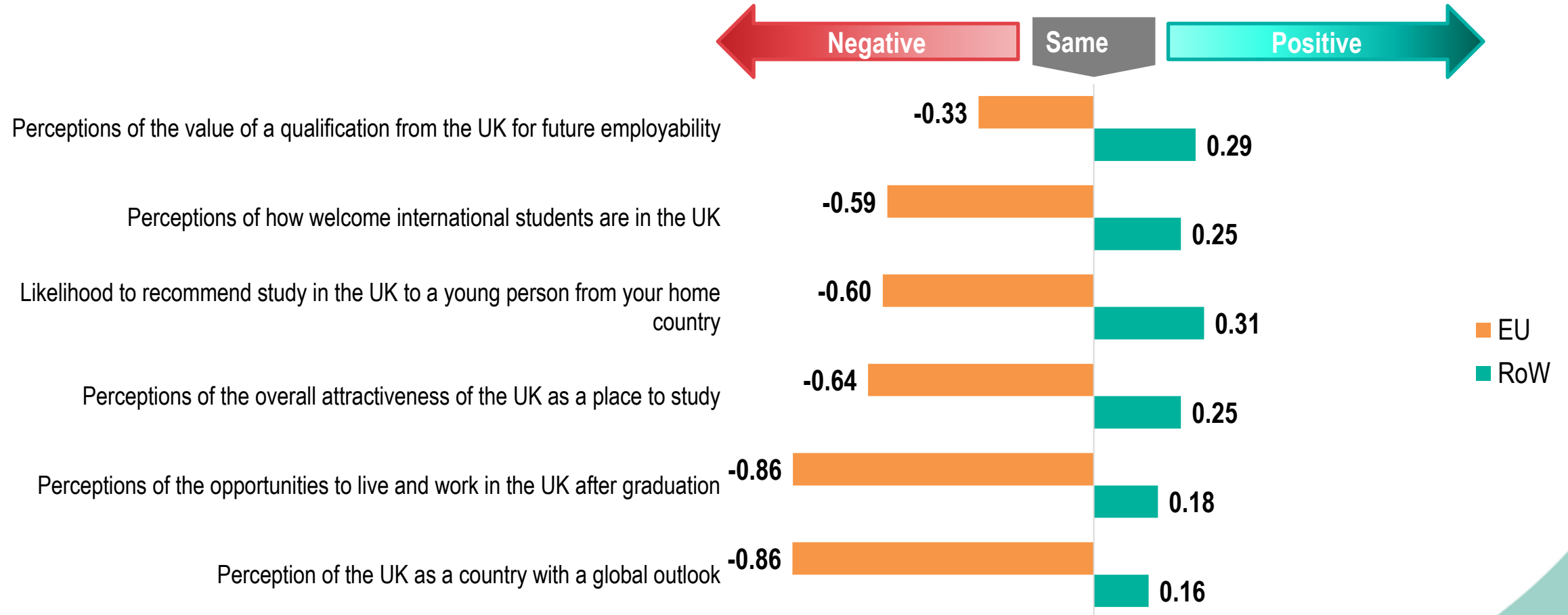
## Perceptions about post-study work opportunities in the UK and about the UK as a country with a global outlook are the aspects of the UK most negatively impacted by Brexit

Has the UK's vote to leave the European Union ("Brexit") had a positive impact, negative impact, or no impact on your:  
Overall (on a 5 point scale where -2 = Very negative impact, 2 = Very positive impact)



## Perceptions of the impact of Brexit are increasingly divergent between EU (negative) and RoW (positive) students

Has the UK's vote to leave the European Union ("Brexit") had a positive impact, negative impact, or no impact on your:  
By citizenship – Mean scores (on a 5 point scale where -2 = Very negative impact, 2 = Very positive impact)



## What else we can offer around the Study UK New International Survey

- In addition to this headline report, we are happy to produce a more detailed analysis for your institution free of charge\*
- For example, we can undertake:
  - Segmentation for your institution
  - Comparative analysis of your institution and others in the region
  - Analysis of students' views on your institution (main reasons for choosing)
  - Tailored analysis of students from a specific sending country(s)
  - Tailored analysis of students studying a specific subject
- We will repeat this survey later this year. We will be in touch in September to share the details
- If you have any queries, please get in touch with Gyongyi Incze ([gyongyi.incze@researchstories.co.uk](mailto:gyongyi.incze@researchstories.co.uk)) or Rebecca Nicoletti ([rebecca.nicoletti@researchstories.co.uk](mailto:rebecca.nicoletti@researchstories.co.uk))
- Thank you again for your support and participation in this survey!



- **Market sizing and opportunity analysis**
- **Market and prospective student segmentation**
- **Market forecasting**
- **Student experience tracking**
- **Brand development**
- **ROI measurement**
- **Custom data analysis**
- **Programme planning and evaluation**



# Research Stories

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