

Why the UK?

The Customer Journey of First Year International Students in the UK

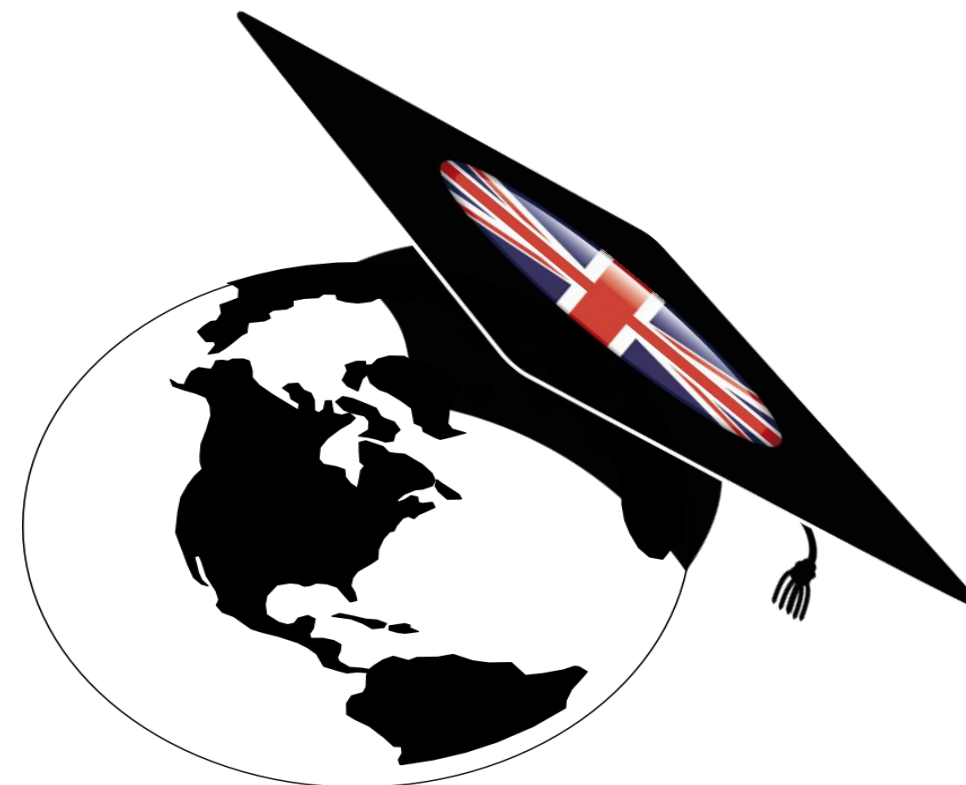
Prepared by Research Stories in collaboration with the GREAT Campaign, Study UK and the British Council

April 2019

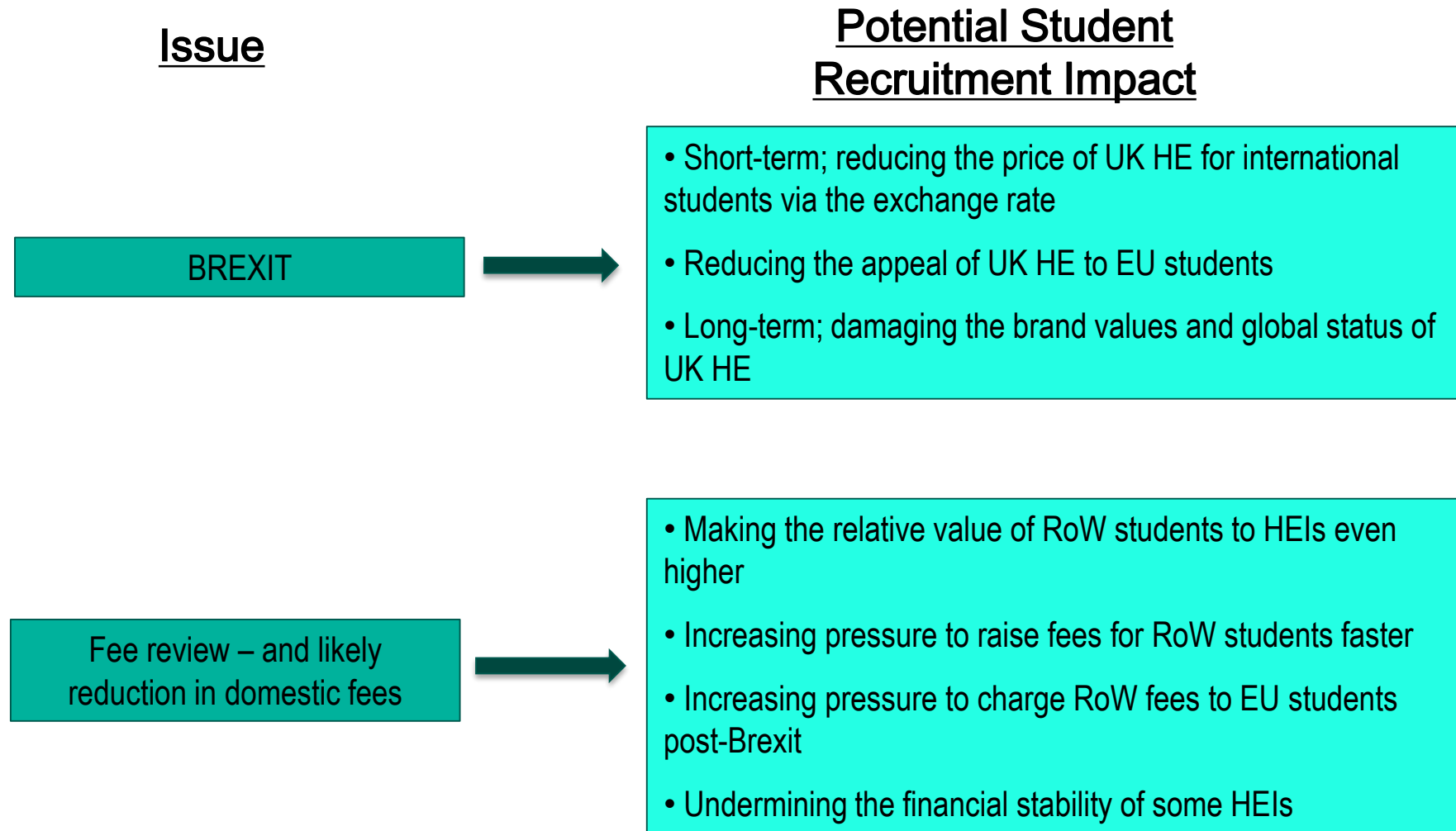
[Sample headline report](#)

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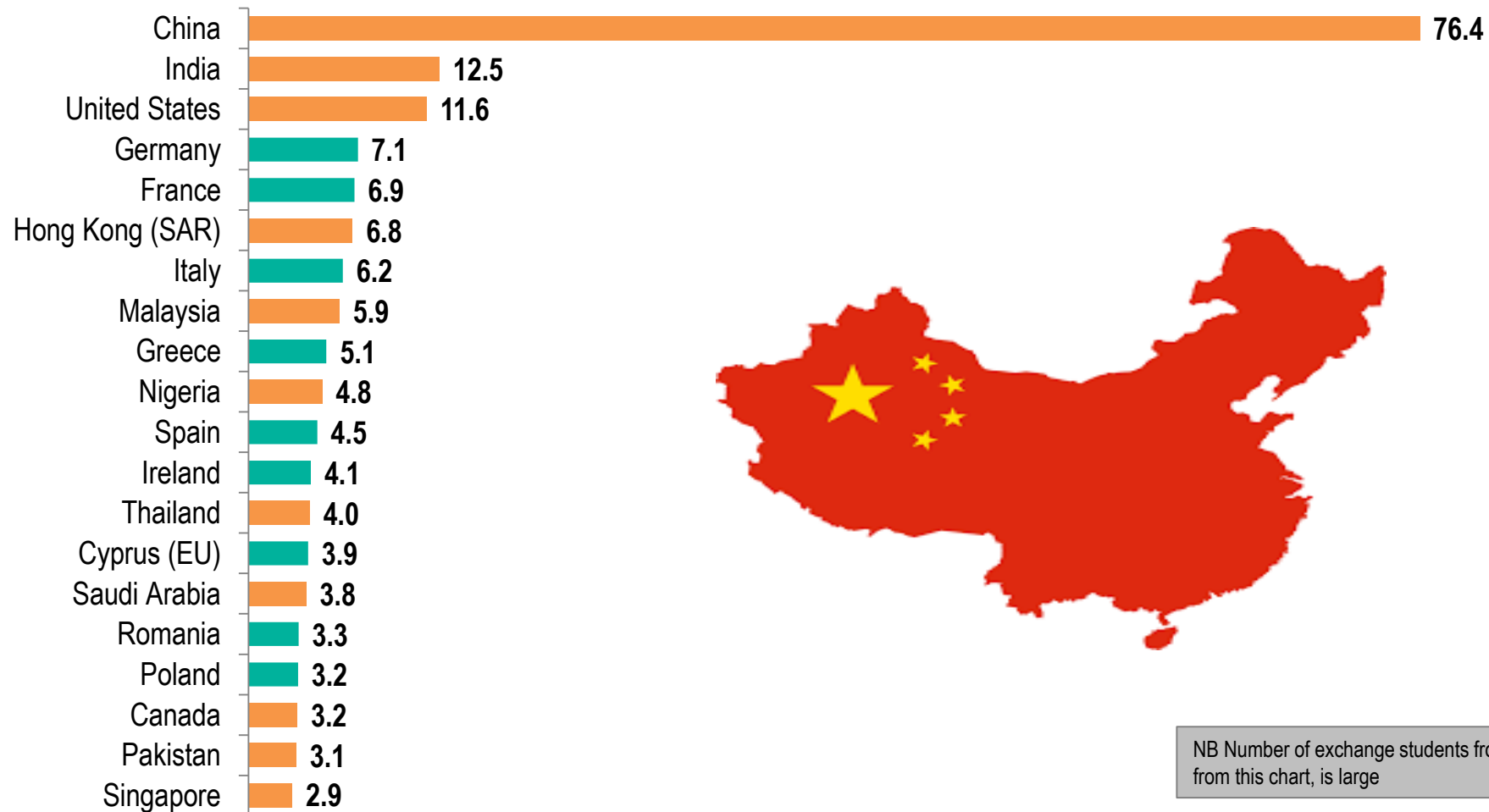
Two big issues keeping Vice-Chancellors awake



The internationalisation of UK Higher Education remains dominated by China

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

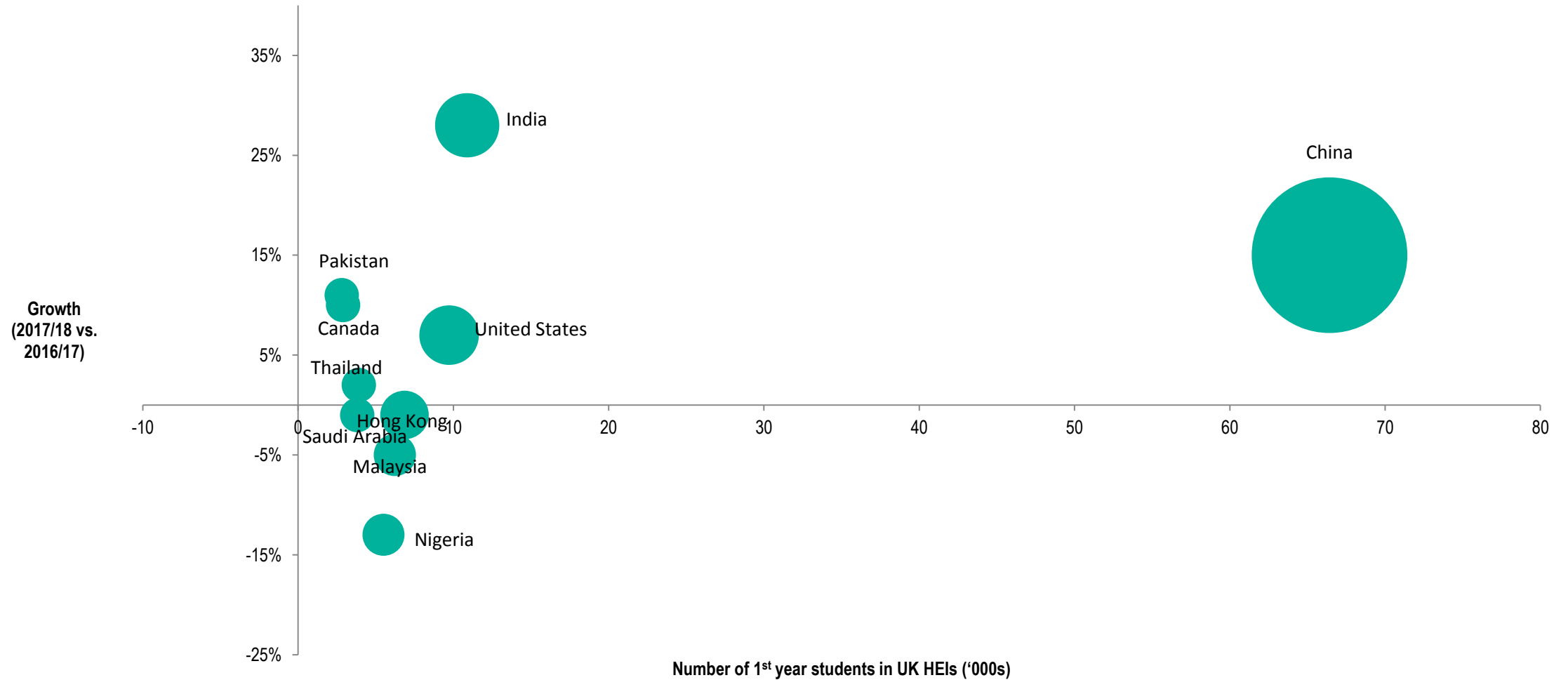
Top 20 largest countries (RoW countries highlighted in orange) – 2017/18



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

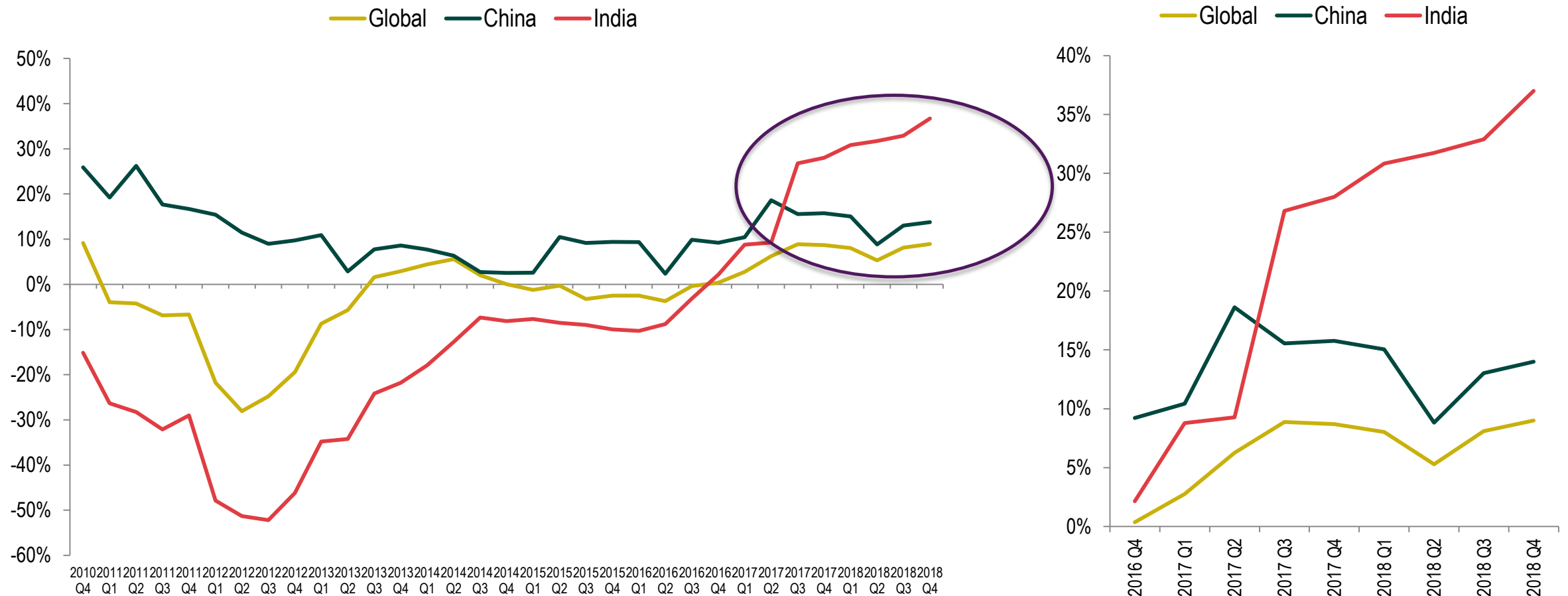
China continues to increase its share of all first year international students

Top 10 RoW countries: Size vs growth of first year students in UK HEIs (2017/18)



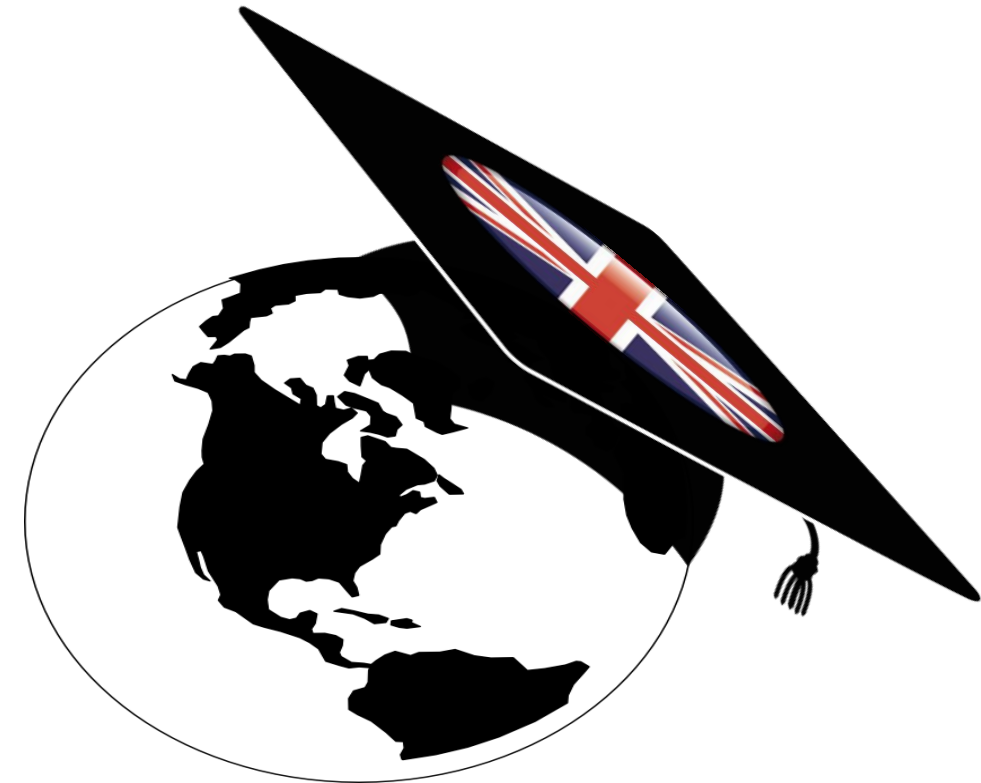
Latest visa data suggests the dramatic rebound in enrolments from India continued into academic year 2018/19

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



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Executive Summary (1)

Motivations to study internationally

- The opportunity for a new cultural experience is a key motivation for studying internationally, alongside education considerations
- A strong UK academic offer is underpinned by the appeal of experiencing UK life and culture as well as by perceived safety of the UK
- **HEIs need to reinforce the positive aspects of UK life and culture to counteract the negative impact of Brexit, especially in the EU**

Segmentation

- New first year international students in the UK fall into 5 segments determined by their main motivations for international study
 - Instrumentalists (27%)
 - Maximisers (26%)
 - Inter-Culturalists (24%)
 - Enrichers (13%)
 - Globalists (9%)
- **HEIs can tailor appropriate messages to appeal to the particular motivations of individual segments of prospective students**

Pathways

- One in five of new international students were already in the UK the year prior to starting their current course
- A third of new international students come to the UK from outside the education system (e.g. directly from employment)
- 4% have previously taken an online course from a UK institution, most commonly on Coursera, FutureLearn or on edX
- **HEIs need to develop integrated recruitment strategies which cover the UK and international origin markets for international students and the growing number of online and offline pathways**

Influences on the decision-making process

- World university rankings (51%) and friends and family (49%) are the most important sources of information influencing the decision to choose the UK
- New international students rate information about costs of study, scholarships and finding job opportunities in the UK less positively than other aspects
- **HEIs can improve their engagement with potential students by providing better information about practical aspects of life in the UK**

Executive Summary (2)

Accommodation

- When searching for accommodation, new international students in the UK rely on online sources; such as university website(s) (35%), student accommodation website(s) (23%), and social media (16%).
- New EU students rely relatively more on online source, whereas new RoW are relatively more reliant on personal contacts.
- **HEIs need to work with student accommodation providers to ensure that they have a strong online presence in order to attract new international students**

Competitive position of the UK

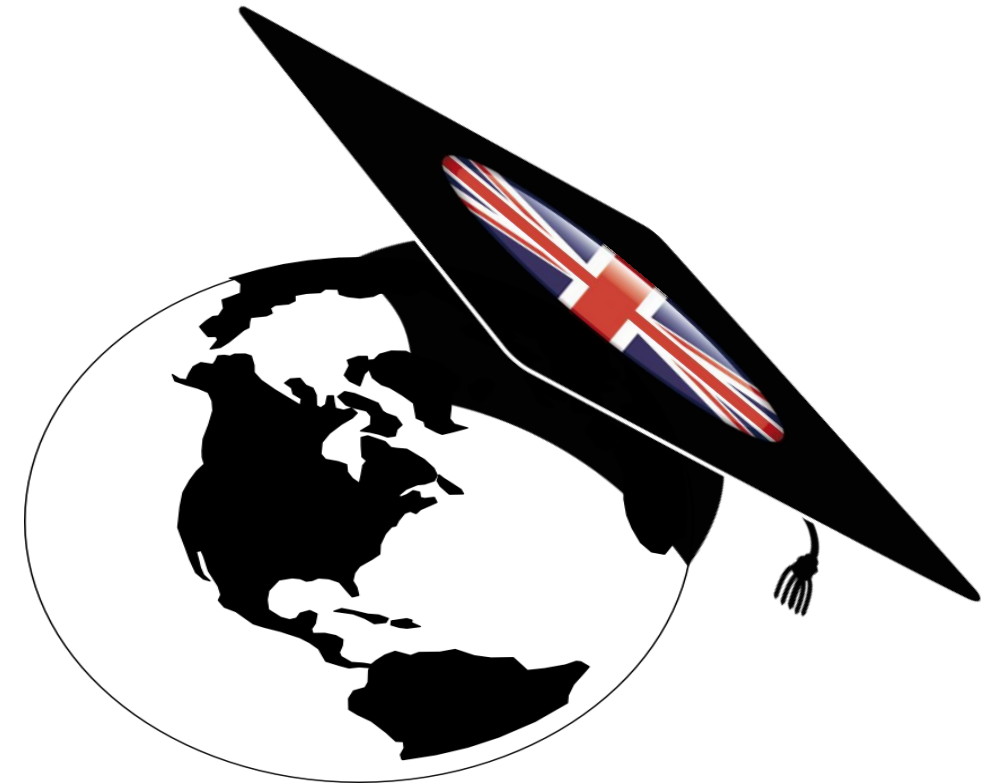
- Less than a third (31%) of new international students in the UK only considered the UK when thinking about where to study
- USA remains the most considered alternative country (33%), but among EU students Germany, Netherlands and Ireland are increasingly considered
- Common cited reasons for choosing the UK over an alternative country include wanting to study in an English-speaking country, shorter (and therefore cheaper) courses, UK culture, and the high quality of education
- **HEIs need to reinforce the many positives of the UK offer, in particular around the length of course (translating into higher relative value perceptions) and the global appeal of UK culture and language**

Impact of Brexit

- Overall, three in ten new international students in the UK say that Brexit has negatively impacted their likelihood to recommend the UK as a place to study to a young person from their home country
- The negative perceptual impact of the Brexit vote is significantly stronger among students from within the EU rather than from RoW; especially around opportunity to work in the UK after graduation and welcomeness
- But relative to results from the last academic year, new international students are slightly less negative overall about the impact of Brexit,
- **HEIs need to respond directly to the challenge of Brexit to recruitment from the EU. Within the constraints of government policy, they need to reinforce the messages of openness and welcome**

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Objectives

- **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



Background

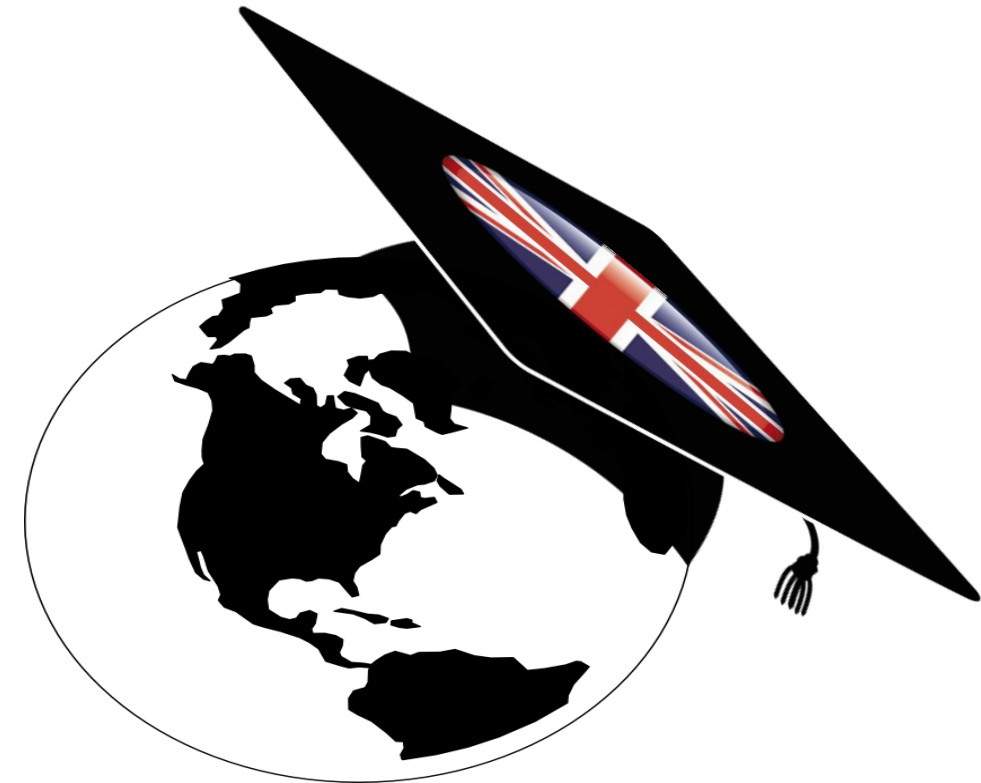
- **The survey research was undertaken on behalf of the GREAT campaign, Study UK and the British Council***
 - This is the fifth annual wave
- **Distribution of the survey was facilitated by the British Council and participating UK HEIs**
- **The survey was targeted at new First Year (2018/19 academic 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**

Methodology

- **Online questionnaire distributed to first year international students at a UK higher education institution (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
- **34 UK HEIs facilitated the research**
 - Russell Group / non-Russell Group
 - London / outside London
 - England, Scotland, Wales, Northern Ireland
- **4,470 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 2018/19 academic year
- **Fieldwork by Research Stories: Nov 2018– Jan 2019**

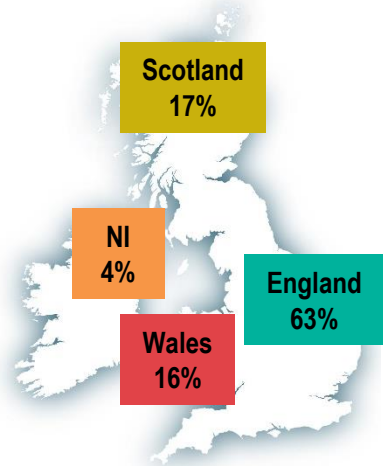
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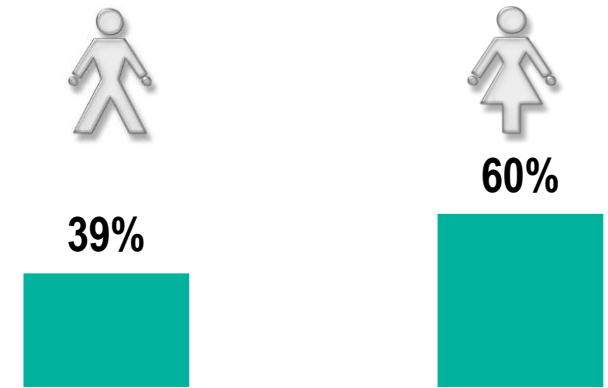
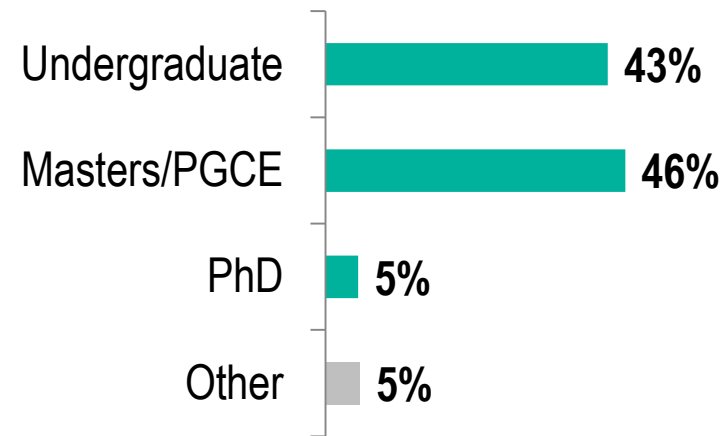


Respondent profile – Demographics

Location of HE Institution

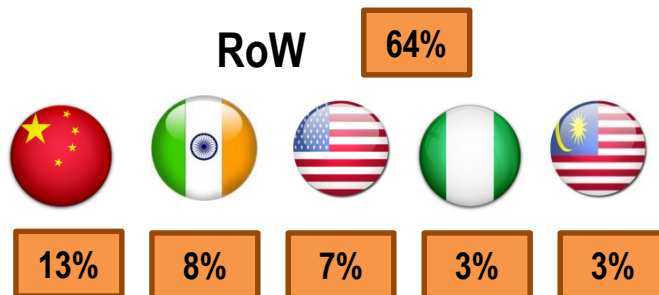


At what level are you studying?

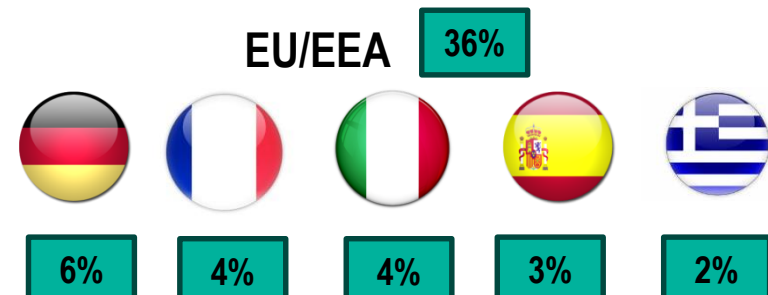


Of which country are you a citizen?

Top5 RoW sending countries



Top5 EU/EEA sending countries



A quarter of respondents are currently studying a Business course

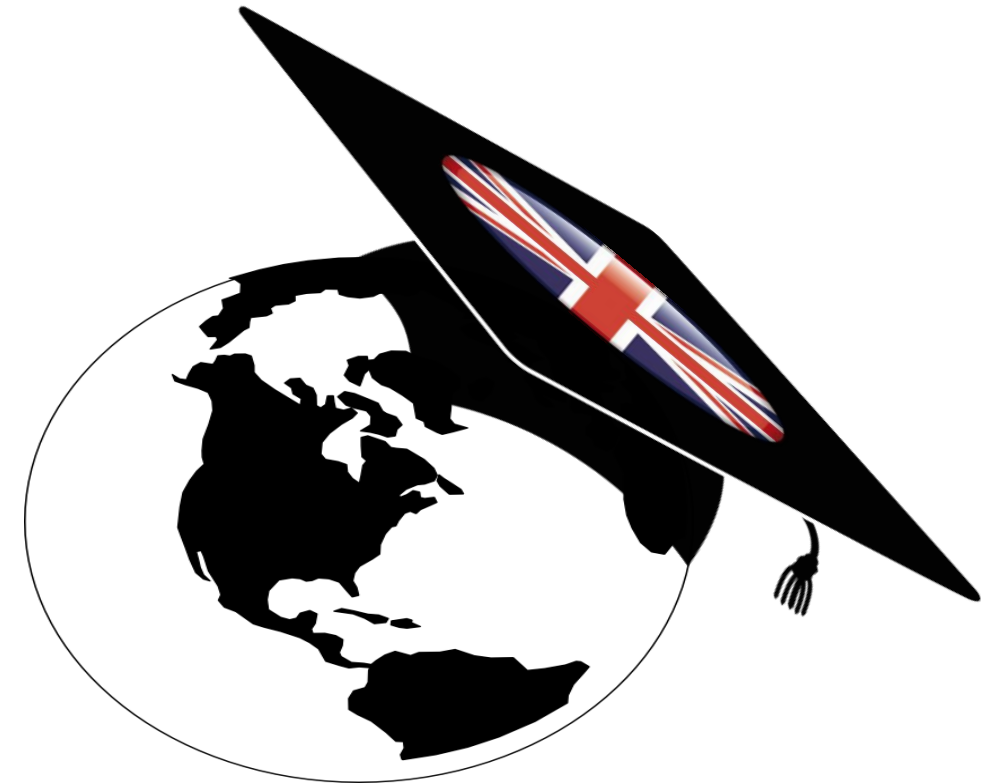
What are you studying in the UK?

Overall



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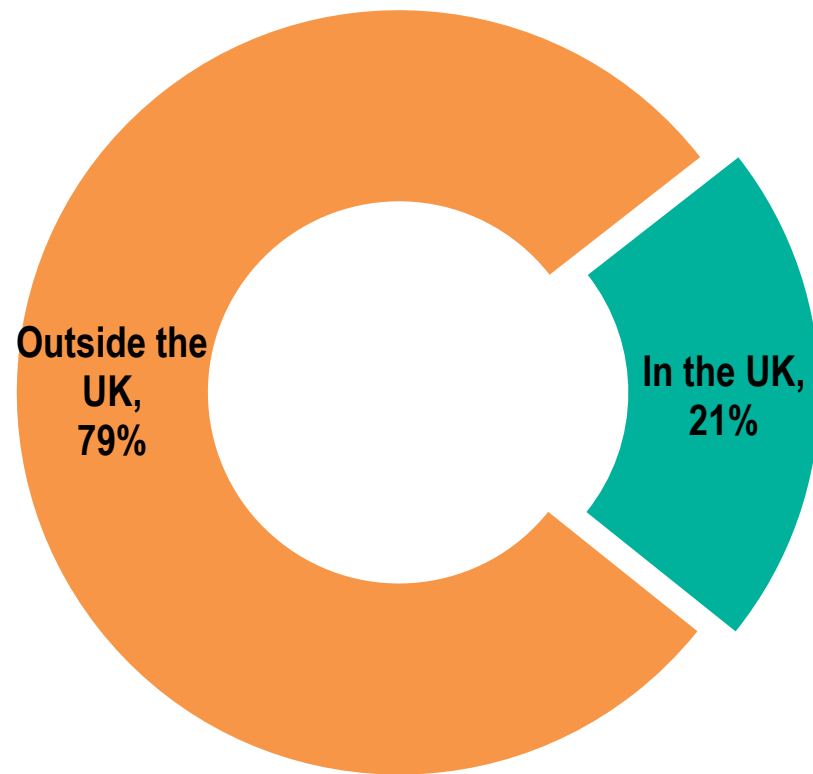
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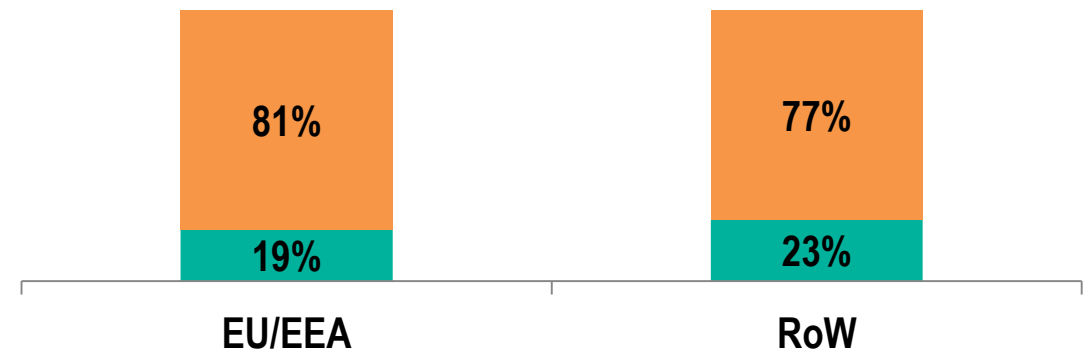
More than one in five new international students were already in the UK in the year prior to starting their course

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

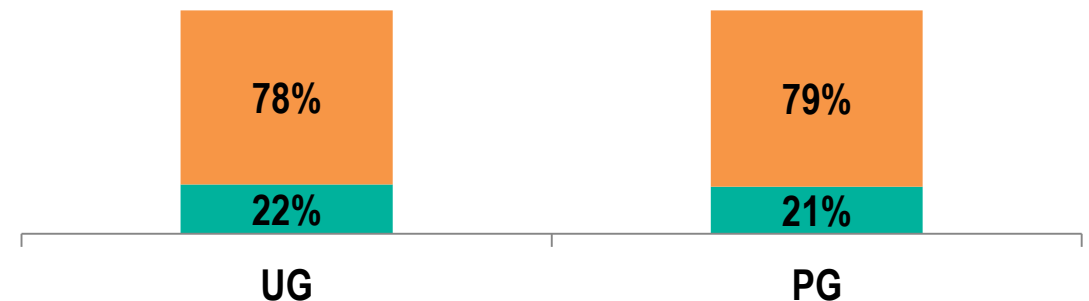
Overall



...and by citizenship



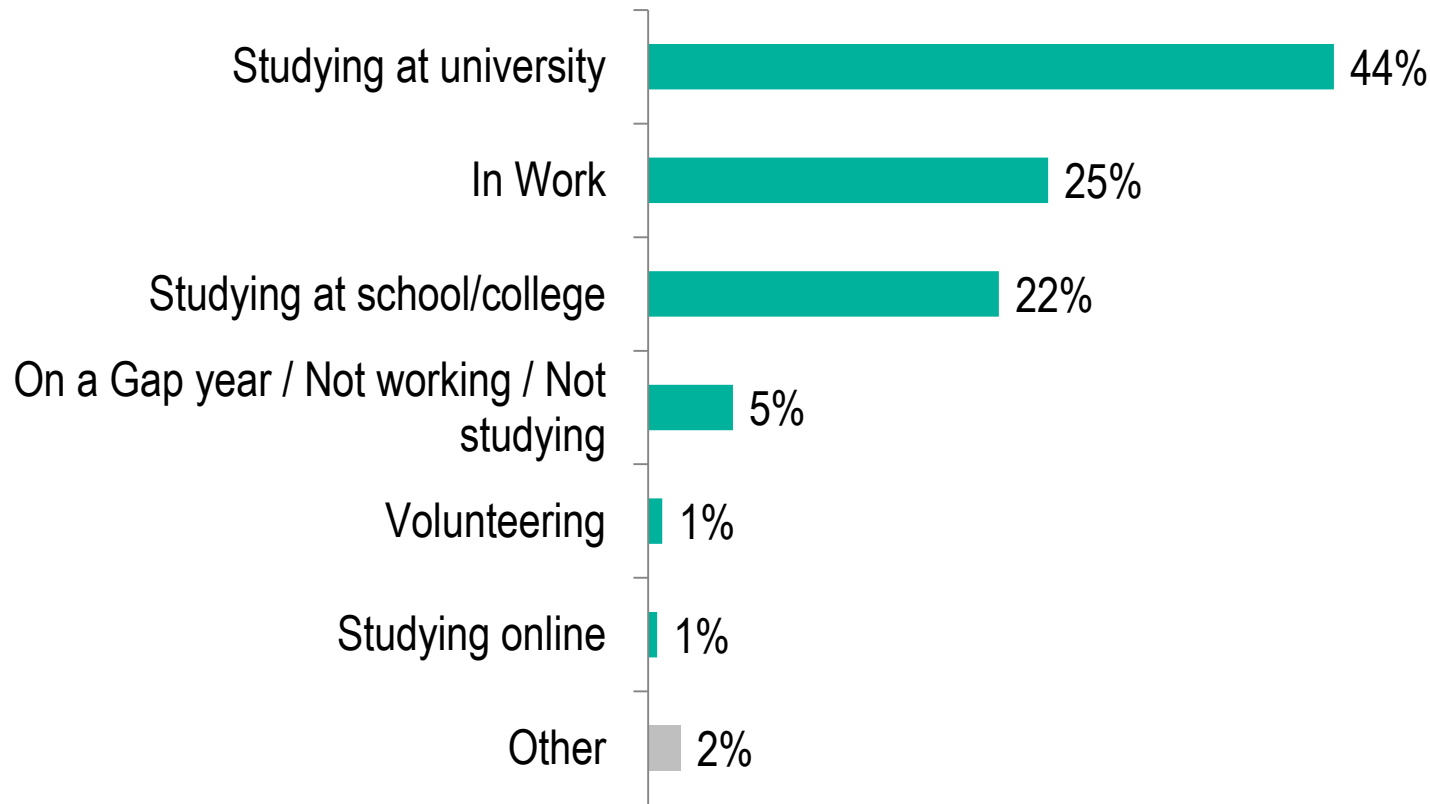
...and by level of study



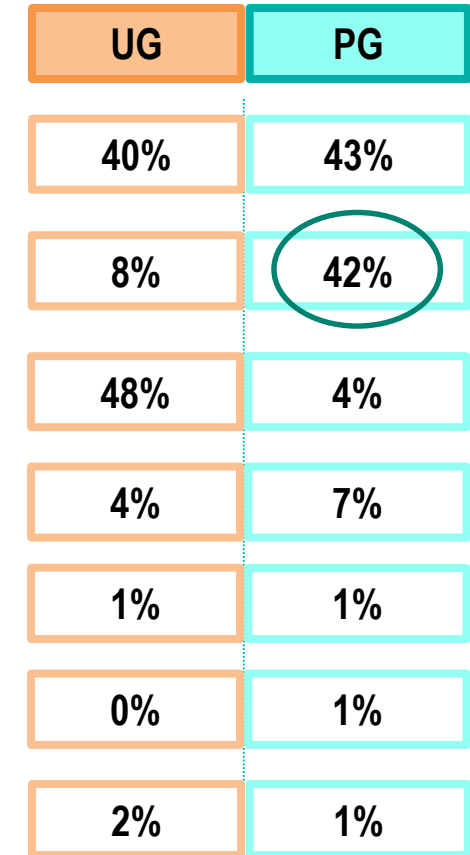
A third of new international students were not studying in the previous academic year

What were you doing mainly in the last academic year 2017/18?

Overall



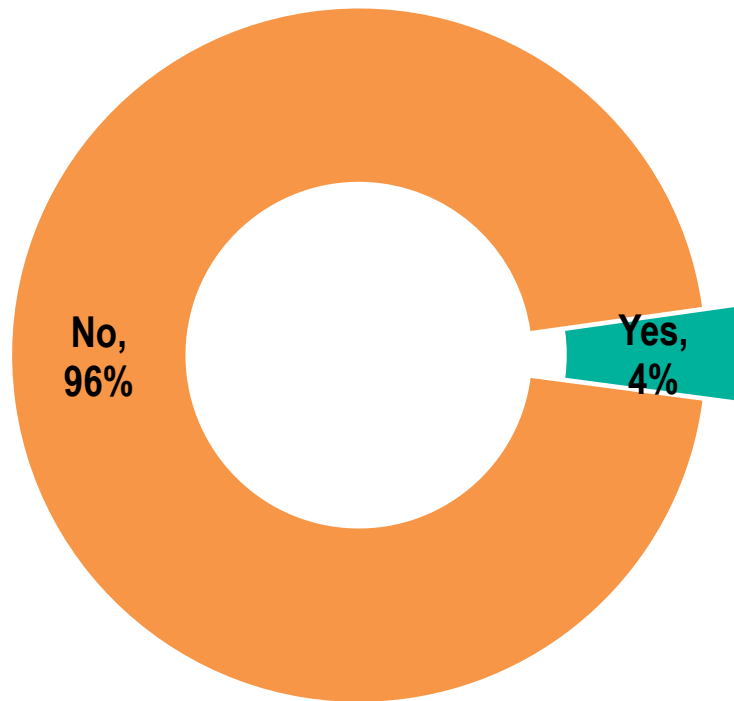
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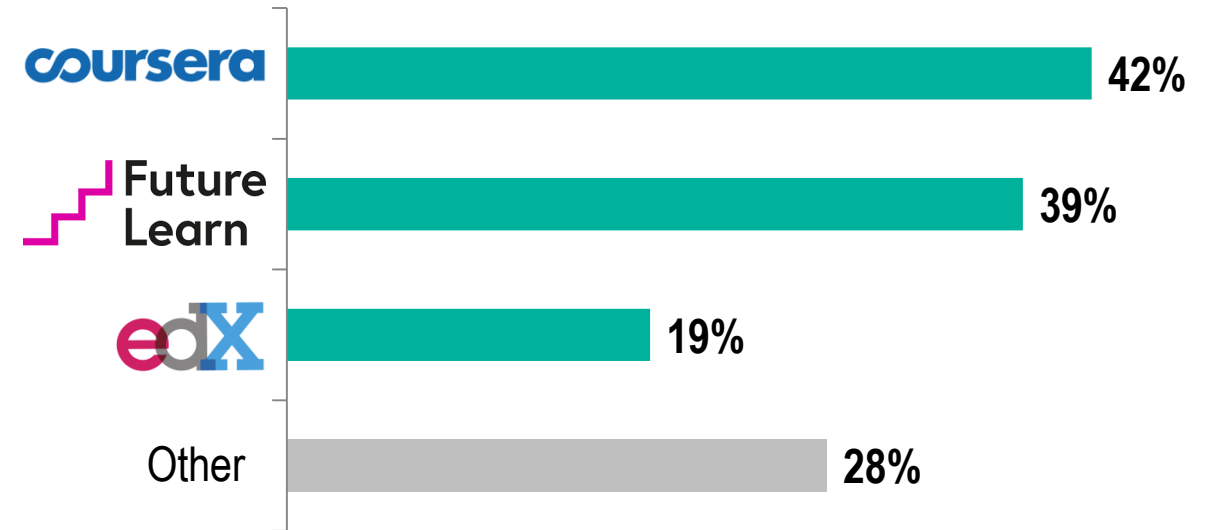
One in twenty new international students have previously taken an online course or MOOC run by a UK institution

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

Overall



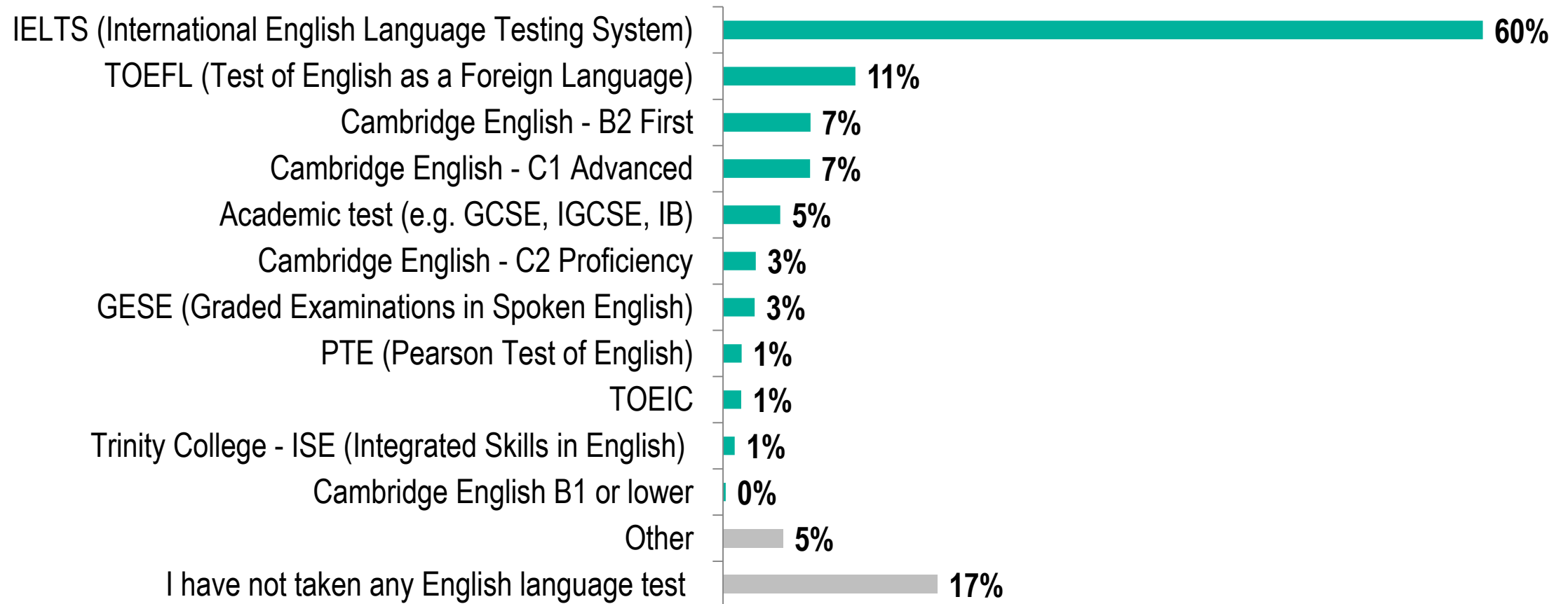
Who provided the platform/access for this online course or MOOC?



IELTS is by far the most popular English language test taken pre-study

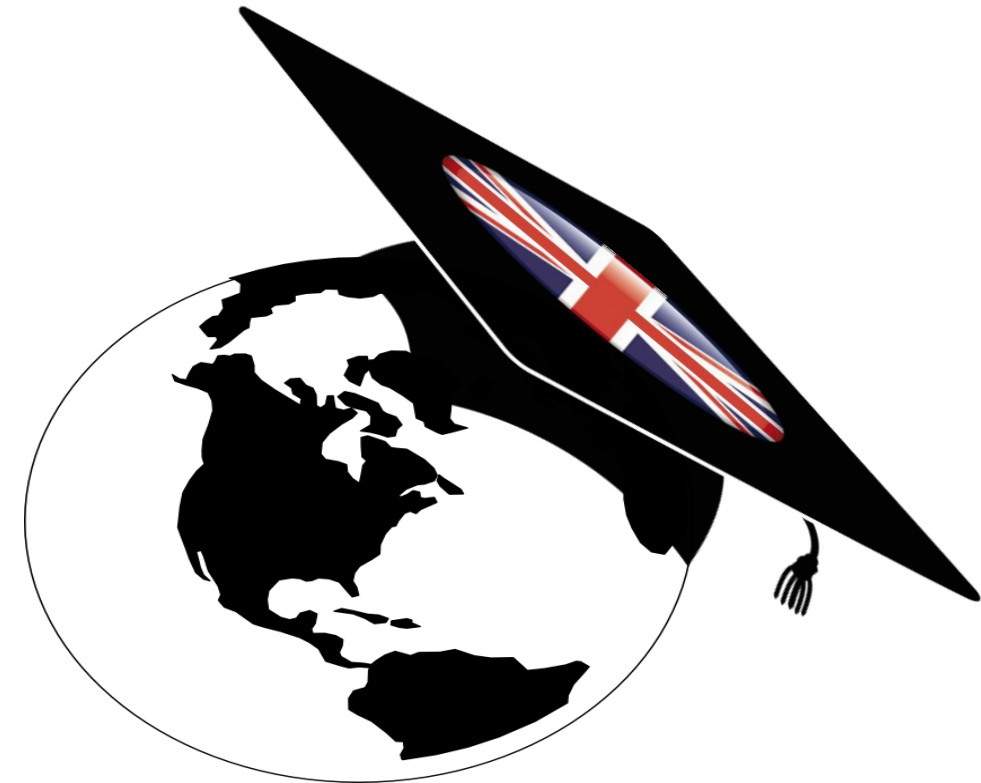
Which, if any, of these English language tests have you taken?

Excl. new international students from English-speaking countries



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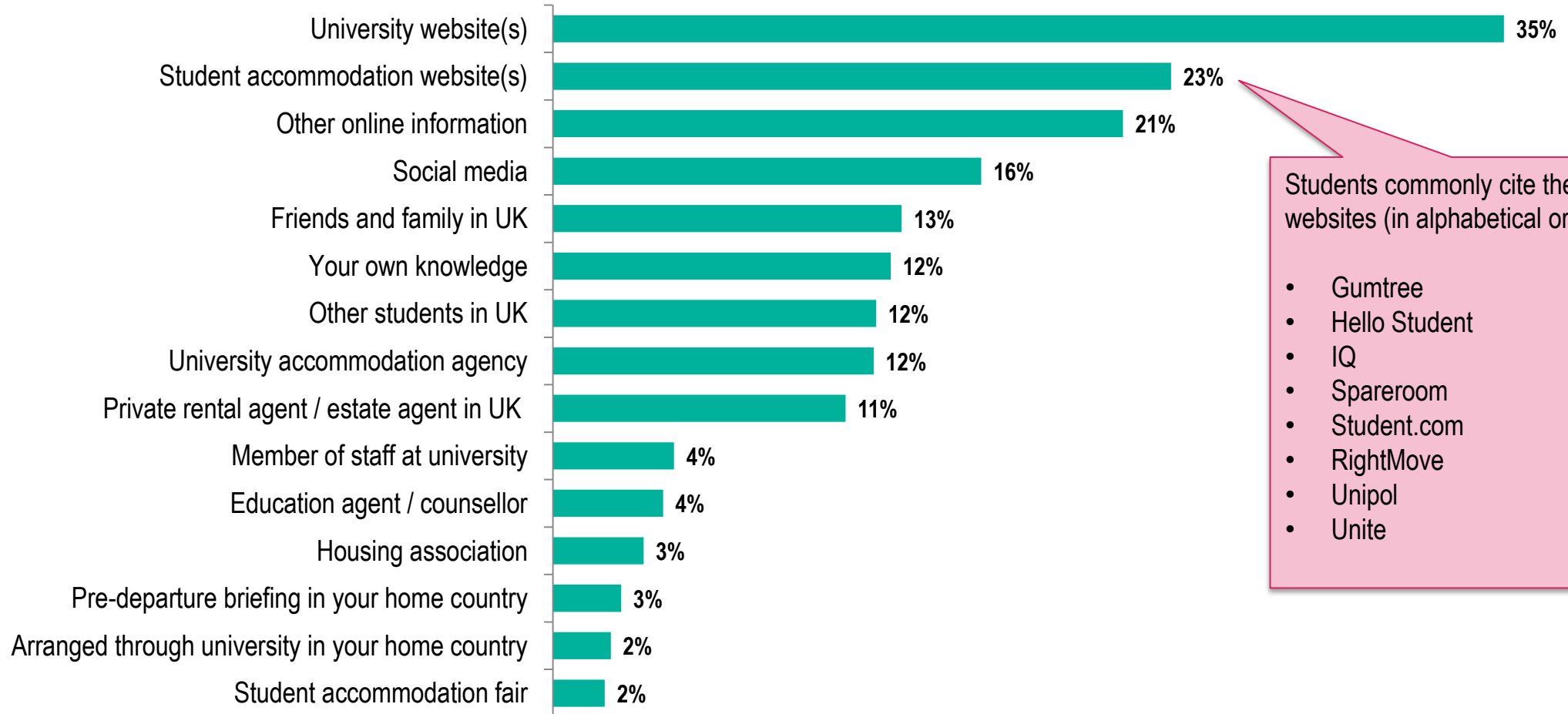
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Online is the most common source of information when searching for international student accommodation

Which sources of information did you use to find out about your current accommodation?

Overall



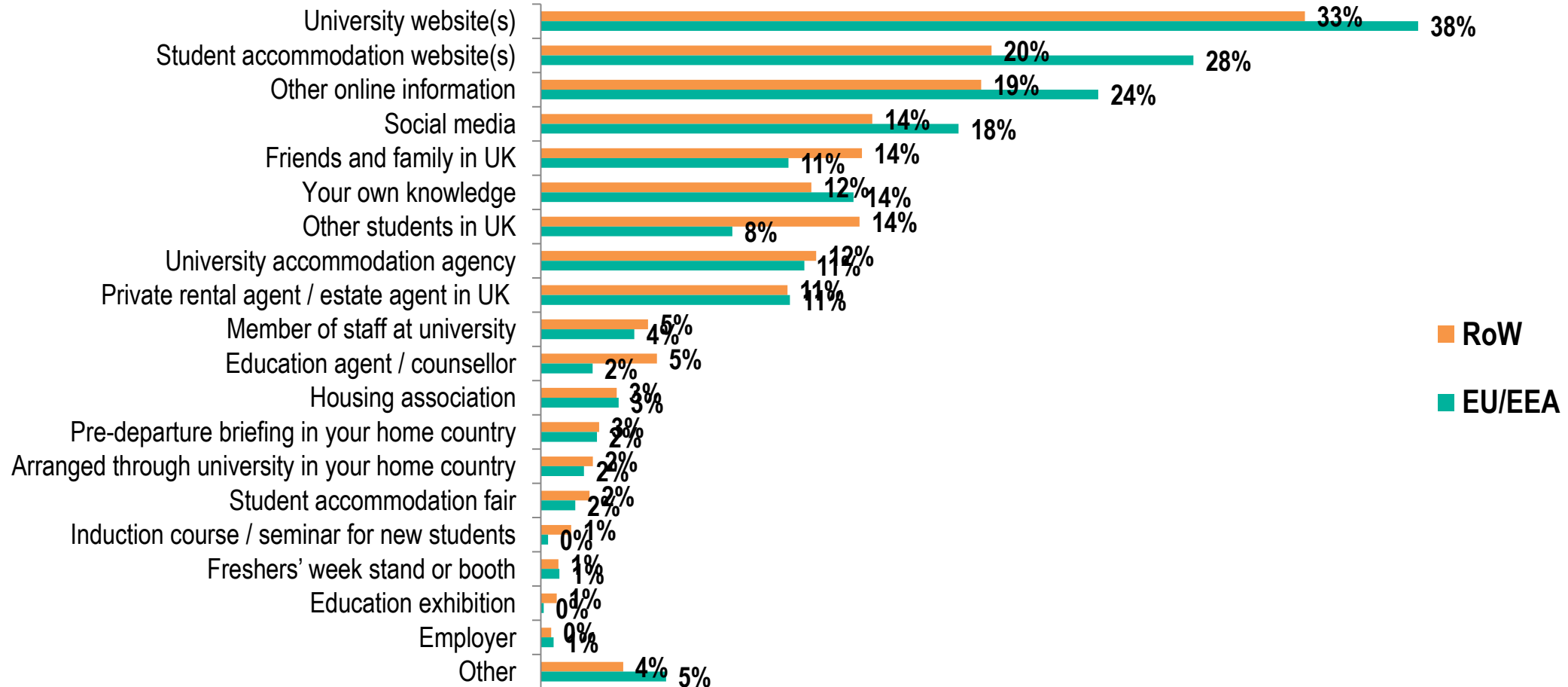
Students commonly cite the following websites (in alphabetical order):

- Gumtree
- Hello Student
- IQ
- Spareroom
- Student.com
- RightMove
- Unipol
- Unite

RoW students are relatively more likely to rely on personal contacts to help find student accommodation

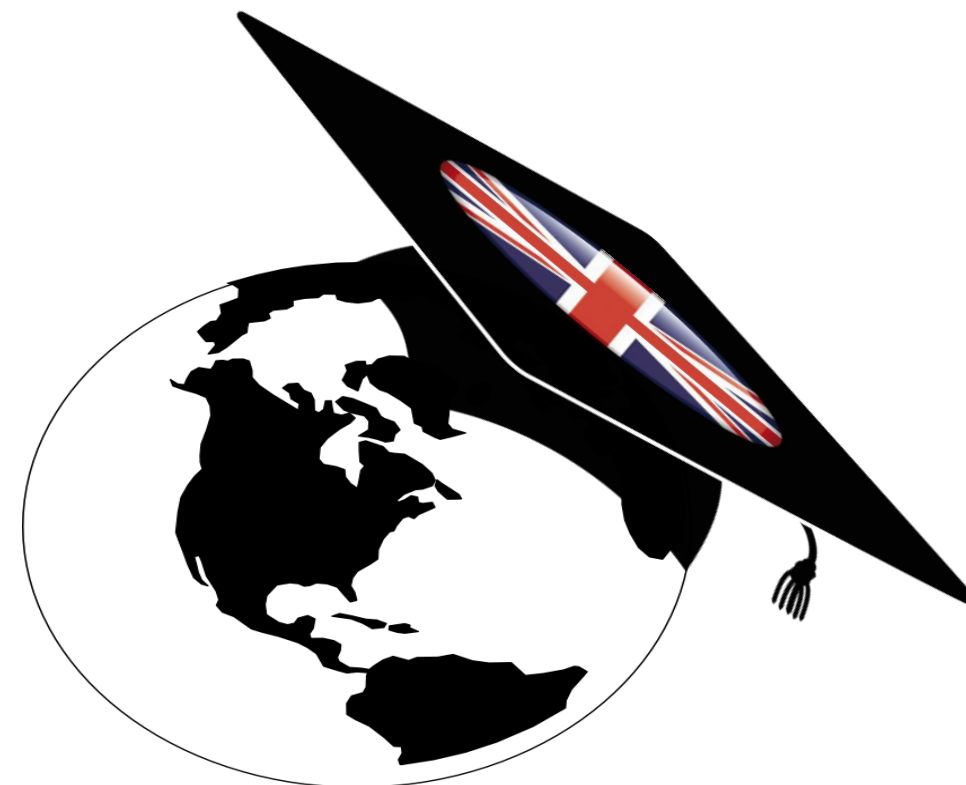
Which sources of information did you use to find out about your current accommodation?

By citizenship



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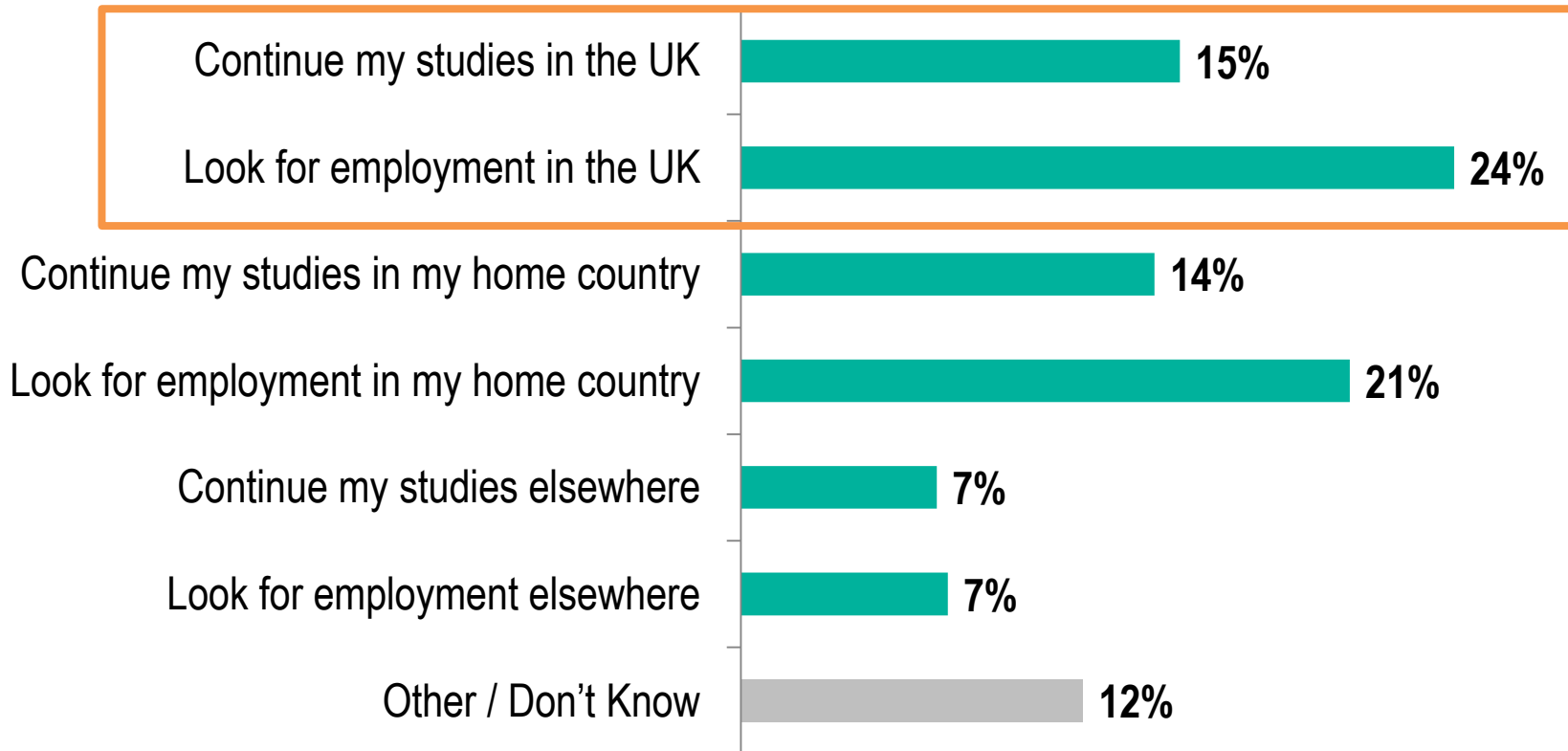
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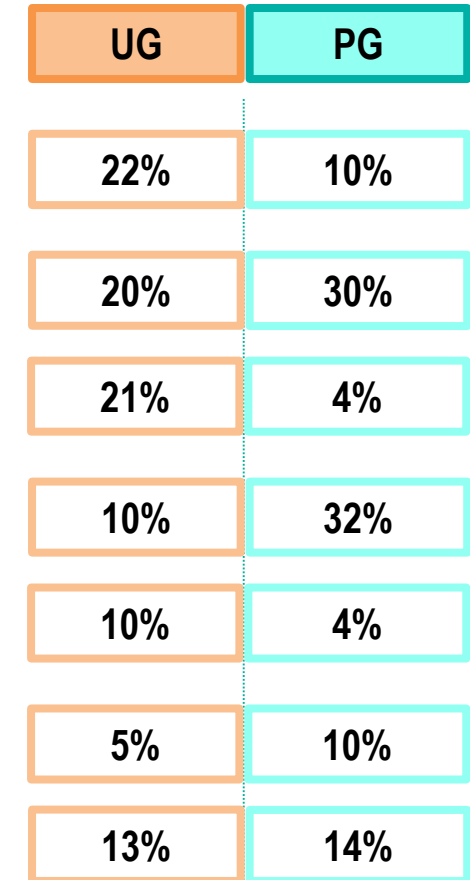
Four in ten international students wish to stay in the UK after completing their current course

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

Overall



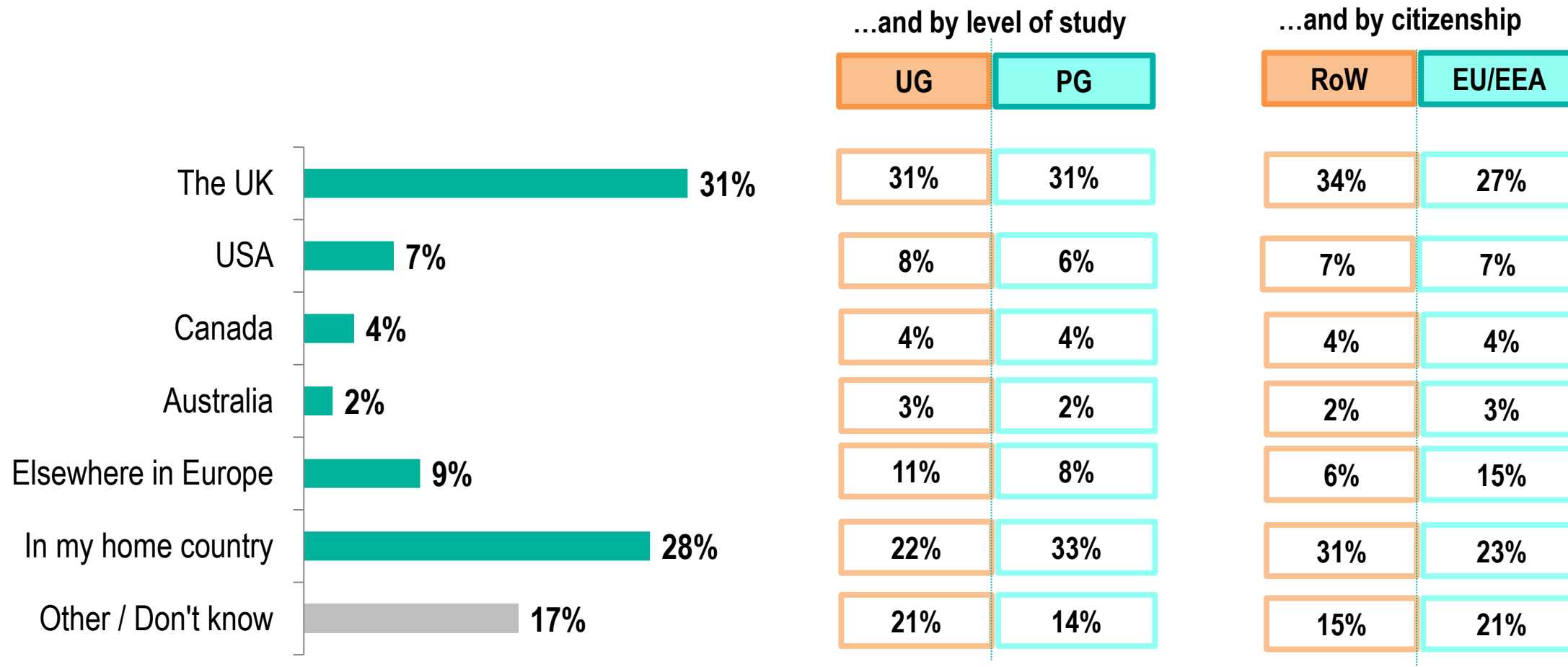
...and by level of study



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

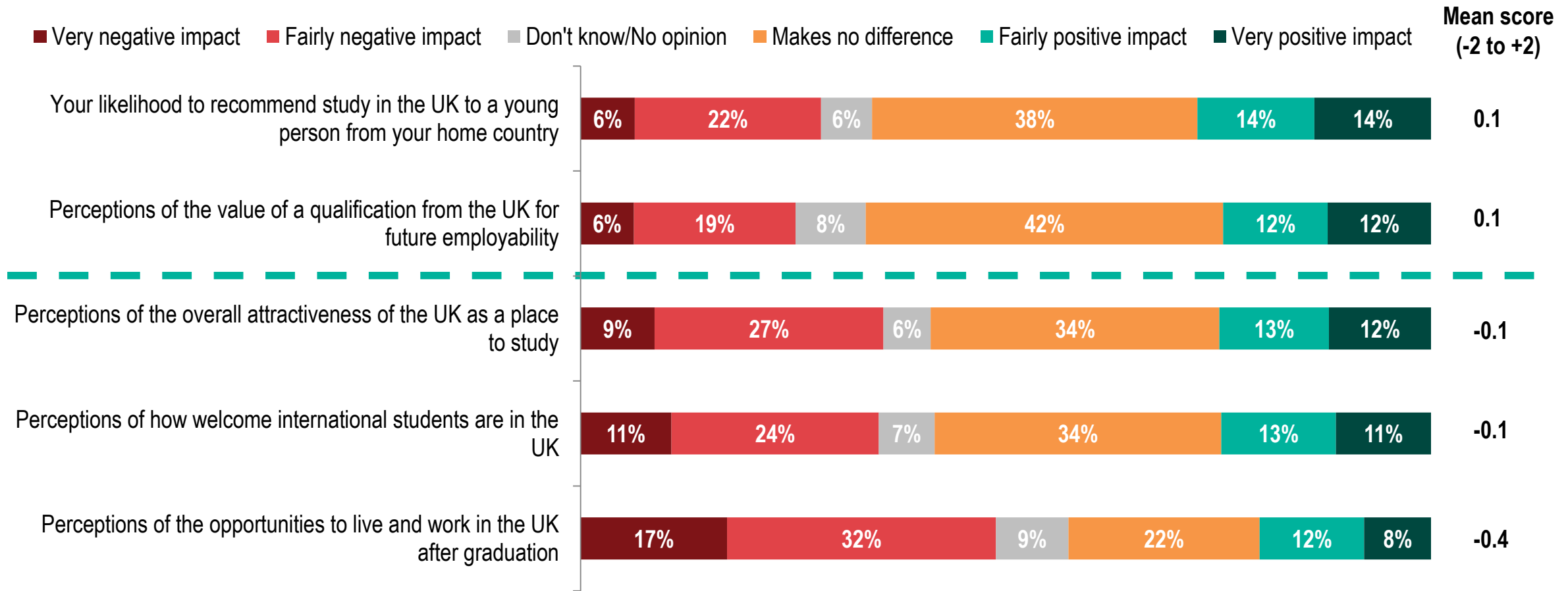
Ideally, where would you like to be living and working/studying in five years time?

Overall



Nearly three in ten new international students in the UK say that Brexit has negatively impacted their likelihood to recommend the UK as a place to study

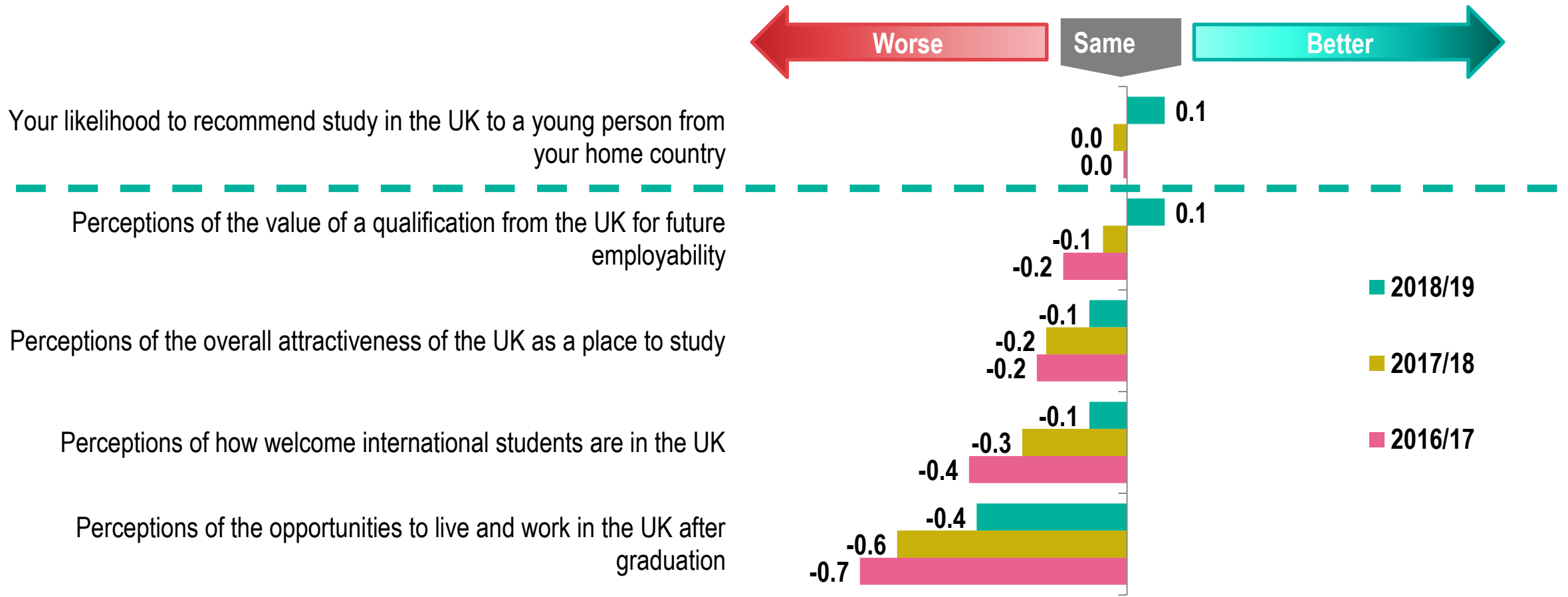
Has the UK's vote to leave the European Union ("Brexit") had a positive impact, negative impact, or no impact on your:
Overall (on a 5 point scale where -2 = Very negative impact, 2 = Very positive impact)



Note: These students are already in the UK therefore there is a possibility for biased perception about the UK

Compared to the previous academic years, new international students in the UK are less negative about the impact of Brexit

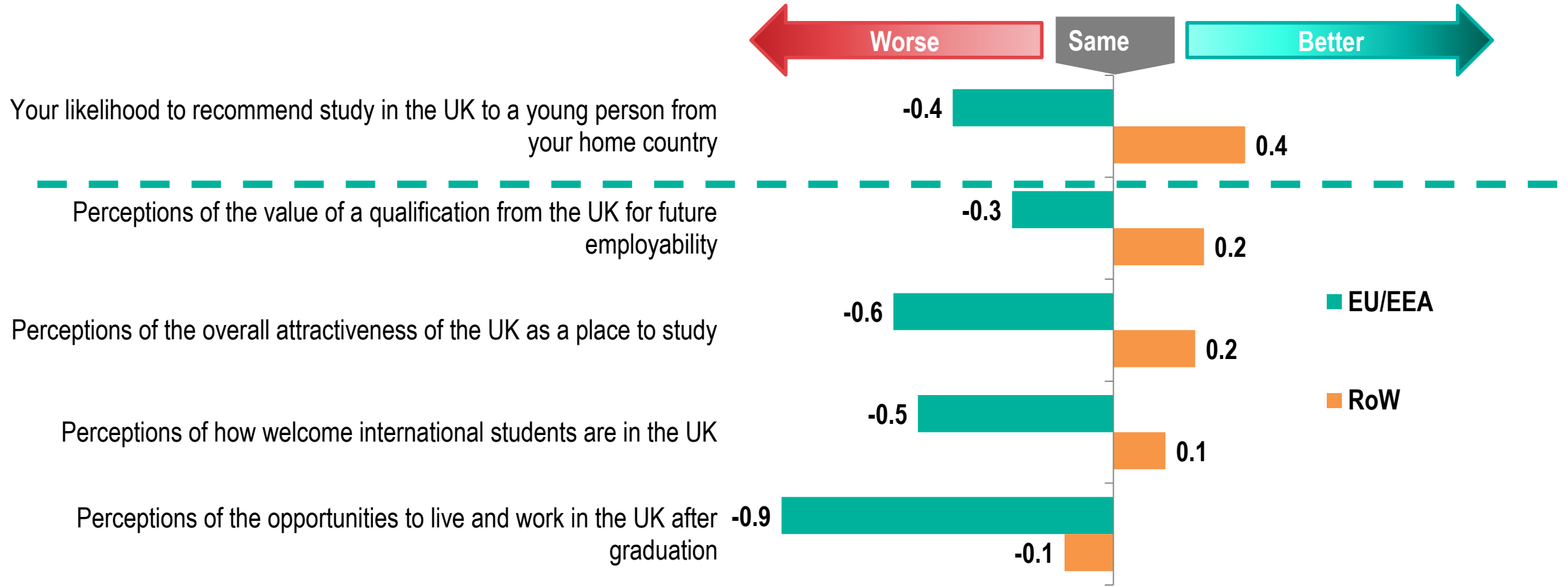
Has the UK's vote to leave the European Union ("Brexit") had a positive impact, negative impact, or no impact on your:
 Comparison between 2016/17, 2017/18 and 2018/19– Mean scores (on a 5 point scale where -2 = Very negative impact, 2 = Very positive impact)



Note: These students are already in the UK therefore there is a possibility for skewed perceptions about the UK

EU/EEA students in the UK are far more negative about the impact of Brexit than RoW 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)



Note: These students are already in the UK therefore there is a possibility for biased perception about the UK

What else we can offer you

- 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 other Russell Group/non-Russell Group universities
 - 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) or Grant Copeland (grant.copeland@researchstories.co.uk)
- Thank you again for your support and participation in this survey!



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