



UCAS – 2019 INTERNATIONAL INSIGHTS

**UNDERSTANDING INTERNATIONAL
APPLICANTS TO UK HIGHER
EDUCATION – WITH A FOCUS
ON KEY MARKETS**

UCAS

INTERNATIONAL STUDENTS ARE AN IMPORTANT PART OF UK HIGHER EDUCATION (HE), ADDING DIVERSITY OF STUDENT POPULATION TO A WORLD-CLASS HIGHER EDUCATION PROVISION.

As the first report published by UCAS with an exclusive focus on non-UK students, this report provides insight into applicants domiciled outside of the UK applying to UK HE – set against the wider context of the global HE landscape. It includes a particular focus on applications and acceptances from China and India. There has been rapid growth in the global HE market over the past decade, and throughout this time UK HE has remained attractive to international applicants. By highlighting the needs and behaviours of non-UK applicants, as well as UK HE's increasing reliance on international students, we hope that this report provides key insights to continue to deliver improved services for international students.

The report covers non-UK students applying to undergraduate courses through UCAS. In a changing and competitive environment, UCAS continues to play a key role in supporting the progression of non-UK students into undergraduate courses across the UK. While some progression takes place outside the UCAS system, 140,955¹ non-UK students applied through UCAS in 2019 – making UCAS the largest single channel for international recruitment to UK undergraduate courses. Comparisons to published HESA data² of all full-time undergraduate acceptances indicate that approximately 95% of European Union entrants, and 60% of entrants from outside the EU, are recorded as being accepted by UCAS. Patterns identified in this report are valid for the undergraduate applicant population which is recorded by UCAS.

¹ Throughout this report numbers are rounded to the nearest five. Percentages are generally rounded to one decimal place. Percentages for survey responses are rounded to integers.

² www.hesa.ac.uk/data-and-analysis/students/where-from

REPORT CONTENT

- > **Section 1: The UK in the global HE market** begins with an overview of the UK share of the global HE market, followed by an examination of high level patterns of application and acceptance to the UK over time. The section concludes with an overview of other destinations considered by international applicants to UK HE.
- > **Section 2: Applicant characteristics and choices** discusses non-UK applicant age and qualification profiles, choices of subjects and providers, and resources used for decision-making.
- > **Section 3: Applicant journeys** examines how non-UK applicants apply to UK HE through UCAS. Areas covered include apply methods, routes, acceptance rates, and applicant experiences of the admissions system.
- > **Key Market Focus:** The boxes entitled 'Key Market Focus' cover the trends specifically for applicants from China and India - the two largest non-UK markets for applicants to UK HE through UCAS.



1. THE UK IN THE GLOBAL HE MARKET

The UK faces increased competition in the growing global HE market

Drawing on its well established reputation for quality higher education, the UK has traditionally performed well in the growing global market for international students. However, more recently, there have been shifts in market position among the leading study destinations, with Australia and Canada increasingly challenging the UK's second place position behind the US³ in terms of incoming international students.

There has also been considerable growth beyond the traditional major English-speaking destinations. China has emerged as a popular destination for international students. Other destinations – including France, Germany, and Japan – have also been strengthening their positions in the global HE market^{3,4}.

Terminology used in this report refers to applicant domicile⁵.

UK	United Kingdom
EU	European Union countries (excluding UK)
Non-EU	Countries outside of the European Union and UK
Non-UK	Countries outside the United Kingdom

140,955

RECORD APPLICANTS FROM OUTSIDE THE UK IN 2019

Record applicants and acceptances from outside the UK, driven by Non-EU growth

UCAS data on undergraduate admissions shows that the numbers of non-UK applicants and acceptances to UK HE have increased in almost every year since 2012⁶. This may be attributed, at least in part, to the removal of number controls at English HE providers.

The UK Government has set a target of 600,000 international students (including undergraduate and postgraduate) studying in the UK by 2030⁷. Combined with the imminent arrival of a new post-study work visa, this may help stimulate growth in HE sector in the coming years.

Another factor which may have stimulated growth in the number of non-UK applicants is the changing exchange rate between the sterling and other currencies making the UK an attractive location for HE.

In terms of changes since 2018:

- > The number of non-UK applicants increased by 5.2% to a record 140,955.
- > Non-UK acceptances increased by 3.8% to a new high of 76,905.

Countries outside the EU have driven this growth, with a combined applicant increase of 8.0%, and acceptance increase of 6.9%.

Overall, numbers of applicants from the EU have stayed relatively stable from 2018 to 2019. As in 2017 and 2018, 2019 saw EU applicant numbers remain below the level seen before the 2016 EU referendum (53,560).

³ www.researchcghe.org/publications/research-findings/the-uk-in-the-global-student-market-second-place-for-how-much-longer

⁴ monitor.icef.com/2018/08/up-and-down-the-table-growth-trends-across-major-international-study-destinations/

⁵ Other terms are defined in the Glossary: www.ucas.com/data-and-analysis/undergraduate-statistics-and-reports/ucas-undergraduate-end-cycle-reports/2019-end-cycle-report

⁶ Outside this report, our interactive dashboard provides further information on End of Cycle applicants and acceptances: www.ucas.com/data-and-analysis/undergraduate-statistics-and-reports/ucas-undergraduate-end-cycle-data-resources-2019

⁷ assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/799349/International_Education_Strategy_Accessible.pdf (PDF)



The global market is increasingly important for UK HE providers

In 2019, non-UK applicants accounted for 20.0% of all applicants to UK HE, up from 19.3% in 2018. The proportion of acceptances from non-UK applicants was 14.2% in 2019, up from 13.9% in 2018. In contrast, in 2010, non-UK applicants accounted for only 16.1% of applicants and 13.1% of acceptances. This suggests that the global market is increasingly important for UK higher education providers.

15.3%

**OF ALL NON-UK APPLICANTS
ARE FROM CHINA**

China is the largest non-UK student market

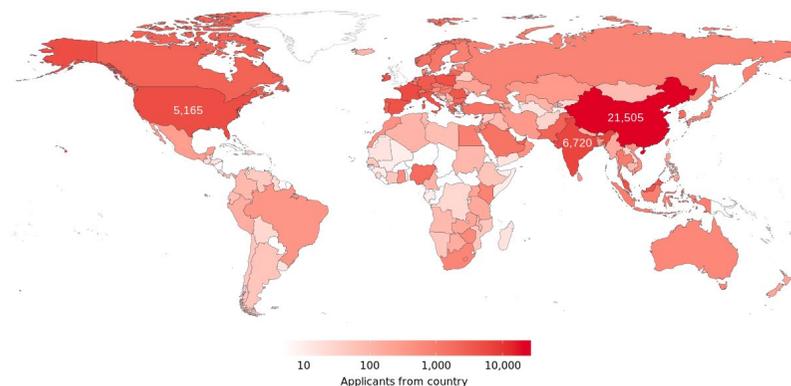


FIGURE 1: The number of applicants from countries around the world to the UK

China accounts for 21,505, or 15.3%, of non-UK applicants – up from 12.8% in 2018. The number of Chinese applicants has now increased every year since 2013 (in which there were 12,095 applicants). If trends continue, China's significance as a component of the UK HE market will grow substantially in the next decade – and so understanding the Chinese market is crucial for UK HE providers.

India accounts for the second largest number of applicants at 6,720, comprising 4.8% of non-UK applicants.

Of applicants domiciled in the EU, the highest numbers are from France, Italy, Poland, Spain, and the Republic of Ireland. EU applicants accounted for 37.7% of all non-UK applicants in 2019, down from 39.3% in 2018. This continues the trend since 2016.

Markets contributing to recent change in demand for UK HE

Substantial growth in applicants from China

The main driver of non-UK applicant growth since 2018 is the acceleration in growth in the number of applicants and acceptances from China. In 2019, Chinese applicant numbers increased by 25.7% and acceptances grew by 22.0%. China now accounts for 3.0% of all applicants (including those from the UK), and 2.3% of all acceptances⁸.

Indian applicants increase, but the picture is more mixed for other established markets

Notably, the number of applicants from India increased by 9.2% in 2019, with acceptances increasing by 14.8% (to 2,770).

The number of applicants applying from the USA has grown from 2018, to 5,165 – albeit by a smaller amount (3.3%).

Countries which have traditionally been a source of significant numbers of applicants to the UK which have not conformed to the trend of increasing applicants from 2018 to 2019 include:

- > Hong Kong, which saw 5.6% fewer applicants in 2019 – from 6,585 to 6,215
- > Malaysia, which has seen its applicant numbers remain relatively stable at 4,420

Emerging markets also contributed to UK growth

Notable emerging markets with substantial increases in UK HE applicants include those from Africa:

- > From Ghana, applicant numbers have increased by 25.5%, to reach 520 applicants in 2019.
- > South Africa (17.1%) has also seen a large increase in applicants to the UK, bringing their 2019 total to 685.
- > Egyptian applicant numbers increased by 8.1% to reach 860.
- > From Nigeria, there has been a sizeable increase of 10.8% from 2018, following a fall of 40.9% in the period from 2010. This has resulted in 1,870 applicants in 2019. It remains to be seen whether this increase will be sustained over future admissions cycles.

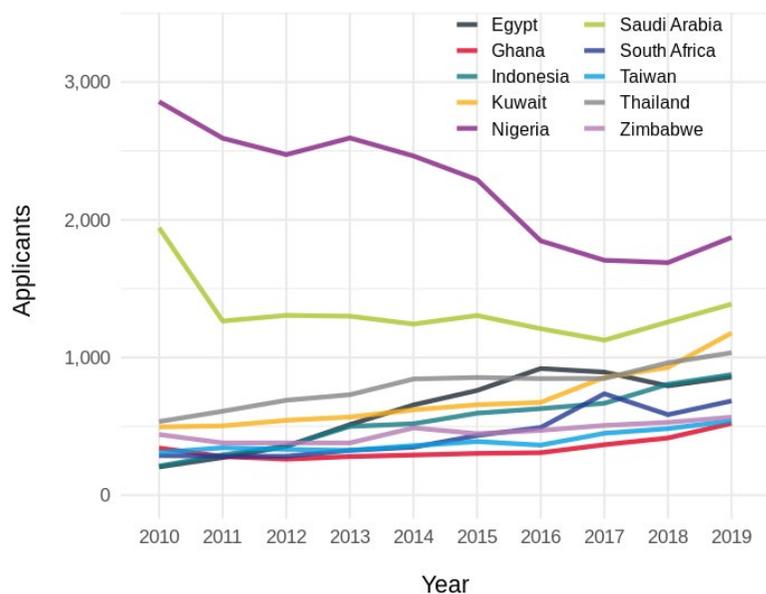


FIGURE 2: The top ten countries in terms of percentage growth of applicants to the UK from 2018 to 2019 (minimum 500 applicants in 2019), excluding China and India

The Middle East, as a source of applicants, has also seen changes:

- > From Saudi Arabia there have been some signs of recovery – a fall of 35.2% from 2010 to 2018 has been followed by a 10.3% increase in 2019, to 1,390 applicants.
- > From a lower base, Kuwait has seen a 26.9% increase, to reach 1,280 applicants in 2019. With more than 1,000 applicants for the first time, following years of successive growth, Kuwait is now an emerging source of applicants to UK HE.

Finally, in South East Asia:

- > From Thailand, there has been a 7.6% increase in applicants, with numbers exceeding 1,000 for the first time (1,035).
- > Applicants from Taiwan have increased by 11.6%, to reach 540.

Non-UK applicants often consider other HE destinations

UCAS surveys applicants about their application choices, and is able therefore to provide insight into the range of destinations they may be considering.

Unsurprisingly, a substantial proportion of non-UK respondents⁹ apply (or intend to apply) to study in their own country (39%)¹⁰.

Additionally, more than a third (36%) of EU respondents, and nearly half (48%) of non-EU respondents also apply to other countries¹¹. Other countries* applied to varied by respondent group:

Respondent group	Top countries outside the UK
EU	Netherlands (48%), USA (19%)
Non-EU	USA (42%), Canada (35%)
China ¹²	Canada (50%), Hong Kong (38%), USA (36%)

* Countries other than the UK and the respondent's own country of domicile.

Clearly, many factors might have an impact on the relative attractiveness of HE provision outside the applicant's own country. Detailed discussion of these factors is beyond the scope of this report. However, it is notable that the UK Government's newly announced post-study work visa¹³, due to launch for 2020/21, will offer the chance for non-UK applicants to spend two years working in the UK post-graduation.

⁸ UCAS has been closely monitoring the ongoing outbreak of coronavirus (Covid-19) to ensure we do all we can to help students with their applications. It could cause applicants who have already applied in the current 2020 cycle not to accept their offers, impacting the number placed at the end of the cycle.

⁹ Respondents to the 2019 new applicant survey. Unweighted survey data are used through this report due to small number of responses from some countries. Results may consequently not be representative of the applicant groups reported. They survey included 35,210 UK and 7,690 non-UK respondents. Of the non-UK respondents, 3,715 were EU applicants and 3,975 were non-EU applicants.

¹⁰ The question asked was 'This year, have you applied, or do you intend to apply, to study at a university or college in the country where you currently live?'

¹¹ The question asked was 'This year, have you applied, or do you intend to apply, to study in countries other than the UK or the country where you currently live?'

¹² There were 240 Chinese and 380 Indian respondents to this survey. As above, data are unweighted, and so results may not be representative of these applicant groups.

¹³ www.gov.uk/government/news/uk-announces-2-year-post-study-work-visa-for-international-students

2. APPLICANT CHARACTERISTICS AND CHOICES

This section provides insight into non-UK applicant characteristics and their UK HE choices. The latter covers both the choices made (including subjects, providers, and locations), and resources applicants use to inform their decisions using UCAS' unique insight from a comprehensive series of applicant surveys.

NON-UK APPLICANT CHARACTERISTICS

Large increases in younger age groups since 2018

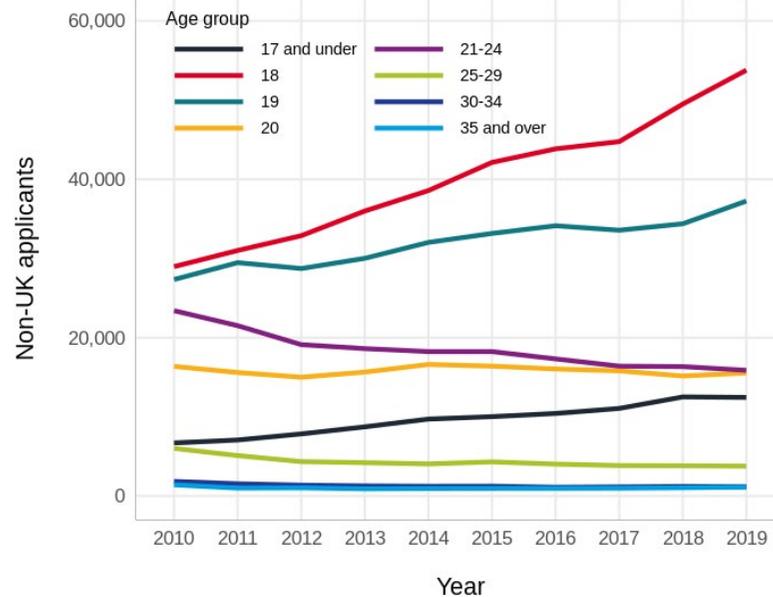


FIGURE 3: The change in non-UK applicants across age groups

The number of 18 year olds applying from outside the UK increased by 8.7%, and the number of acceptances has risen by 7.0% since 2018.

Over the same period, there have been drops for those in the 21 – 24, 25 – 29, and 30 – 34 age groups, but a noticeable (8.6%) increase in applicants aged 35 and over.

Non-UK applicants are much less likely to be in older age groups (25 – 29, 30 – 34, and 35 and over). Only 4.3% are aged 25 and above, compared to 15.2% for the UK.

Consistent with UCAS' previous reporting on non-UK applicants, it should be noted that the age groups reported here align each applicant's age to the English and Welsh school year (i.e. age as at 31 August).

KEY MARKET FOCUS

The increase in younger age groups has again been driven by non-EU countries, particularly China. In this country, compared with 2018, the number of:

- > 18 year old applicants rose by 40.1%
- > 19 year old applicants rose by 36.6%

Similarly, India showed an 18 year old applicant increase of 7.2%.

More non-UK applicants are taking International A levels than UK A levels

Non-UK students apply with a wide range of qualifications.

The A level and the International Baccalaureate (IB) are two key qualifications for this applicant group. Of the 140,955 non-UK applicants, a substantially higher proportion were verified to be holding an A level (17.5%) compared to an IB (7.6%)¹⁴. Notably, the proportion of non-UK applicants with International A levels¹⁵ (11.1%) has exceeded the proportion of non-UK applicants with UK A levels (8.3%).

¹⁴ In this context, 'verified' corresponds to qualification data verified by UK-based awarding bodies.

¹⁵ International A levels considered consist of the Cambridge International A level, Pearson Edexcel International A level, and Oxford International AQA A level.

The growth in the number of applicants applying with an IB ceased in the 2019 cycle. However, 3.5 times more non-UK than UK applicants have an IB. The acceptance rates for non-UK applicants holding an A level or IB are similar – at 65.4% and 63.9%. For non-UK applicants holding neither, the acceptance rate is lower at 51.1%. It should be noted that variations in different countries' acceptance rates may affect the acceptance rates of different qualification types.

KEY MARKET FOCUS

Students apply holding an increasingly diverse range of qualifications.

As the mix of markets comprising non-UK demand changes over time (including the relative growth of China), the qualifications held by non-UK applicants will correspondingly change – even without changes in the qualification profile of applicants within an individual country.

However, changes have occurred in the qualifications held by Chinese applicants since the 2018 cycle:

- > The number of Chinese domiciled applicants verified to be holding an A level has grown by 29.5% to reach 7,085, which is 32.9% of all Chinese applicants.
- > Verified IBs have also grown, albeit only 3.0% of Chinese applicants hold one.
- > Self-reported data¹⁶ shows Chinese applicants also hold a large range of qualifications, ranging from the Chinese Gaokao to the USA's Advanced Placement Test.

CHOICES MADE BY NON-UK APPLICANTS

Subject choices for non-UK applicants differ to those from the UK

In terms of the motivations underlying subject choices, the majority of non-UK respondents to UCAS' 2019 placed applicant survey which is sent to accepted applicants after the End of Cycle reported choosing their degree subject¹⁷ based on what they enjoy most (EU – 78%, non-EU – 71%). This was followed by what will give them good career prospects after graduation (EU – 57%, non-EU – 61%). These motivations are similar to those of UK respondents.

APPLICANTS CHOOSE SUBJECTS THEY ENJOY THE MOST



¹⁶ We include self-reported qualifications at this point, as doing so allows us to cover a greater breadth of qualifications. These are not, however, verified with awarding boards.

¹⁷ The 2019 placed applicant survey had 5,770 EU and 4,400 non-EU respondents. The question asked was 'Which of the following are reasons for you choosing the subject you are going to be studying? Please select all that apply.' Unweighted survey data are used throughout this report due to small number of responses from some countries. Results may consequently not be representative of the applicant groups reported.

KEY MARKET FOCUS

For China specifically, the top JACS 3.0 subject lines in 2019 included combinations, within business & admin studies (4,210 applicants), management studies (3,185 applicants), accounting (2,395), and mathematics (2,140). Many of these subjects have seen double digit growth in applicants since 2018.

In terms of change since 2018, the subjects with the greatest percentage increases include sociology (93.0%), academic studies in education (70.4%), combinations of sciences with engineering/technology (68.2%), and psychology (59.3%).

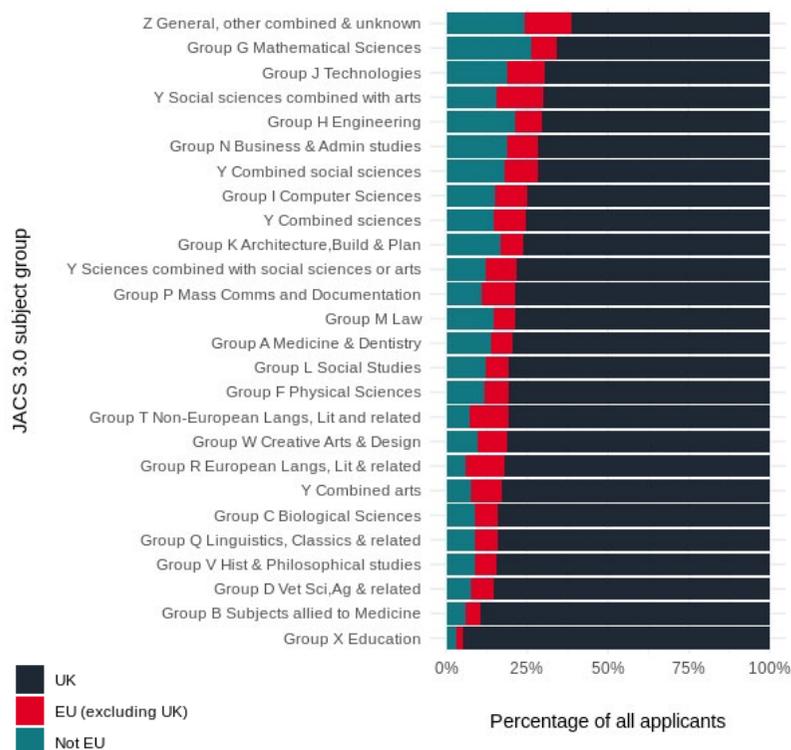


FIGURE 4: The proportion of applicants to each JACS 3.0 subject group from each domicile in the 2019 cycle

KEY MARKET FOCUS

'Knowing someone at the university' is more important for applicants from China (45%) than for non-EU (26%), EU (20%), and UK (20%) applicants.

Combinations of subjects are particularly popular with non-UK applicants. 13.3% of EU and 10.3% of non-EU applications are to courses consisting of multiple subjects, compared to only 8.2% of UK applications.

Some science, technology, engineering, and mathematics (STEM) subject groups, including mathematical sciences and engineering, have a relatively high proportion of non-UK applicants. As shown in Figure 4, 34.2% of applicants for mathematical sciences are from outside the UK, compared to only 5.2% of applicants for courses in education. Considering the fact 20.0% of applicants are non-UK, it is interesting to see that some specific STEM subjects (at JACS 3.0 subject line level) such as statistics (64.8%), artificial intelligence (64.0%), biotechnology (56.3%), and materials science (52.9%), among others, have over half of all applicants from outside of the UK.

Several specific subject areas are growing quite rapidly for non-UK applicants. The trend of combinations of courses being popular seems to be continuing. Artificial intelligence has increased from 90 non-UK applicants in 2010 to 1,050 in 2019, almost a 12-fold increase. Physics is also notable, with non-UK applicants rising by 19.0% in 2019.

Quality of teaching is important

Applicants consider many factors when making their university/college choices. The factor that is most often chosen as important¹⁸ by applicants responding to UCAS' 2019 new applicant survey (sent shortly after they've applied) is 'the quality of staff/teaching'. The other two most important factors are 'the quality of the teaching facilities at the university' and 'the academic entry requirements for the course'.

UK, EU, and non-EU respondents selected the same top three factors.

In terms of lifestyle factors¹⁹, the most important for non-UK survey respondents are:

- > availability and quality of university accommodation
- > cost of living at the university
- > the social life or activities available through attending the university

¹⁸ 'Important' here refers to respondents having chosen 'Extremely important' or 'Important' in the question. The question asked was 'When deciding which universities and colleges to apply to, how important were the following factors?'

¹⁹ The question asked was 'When deciding which universities and colleges to apply to, how important were the following lifestyle factors?'

Non-UK applicants are much more likely to apply to London and Scotland

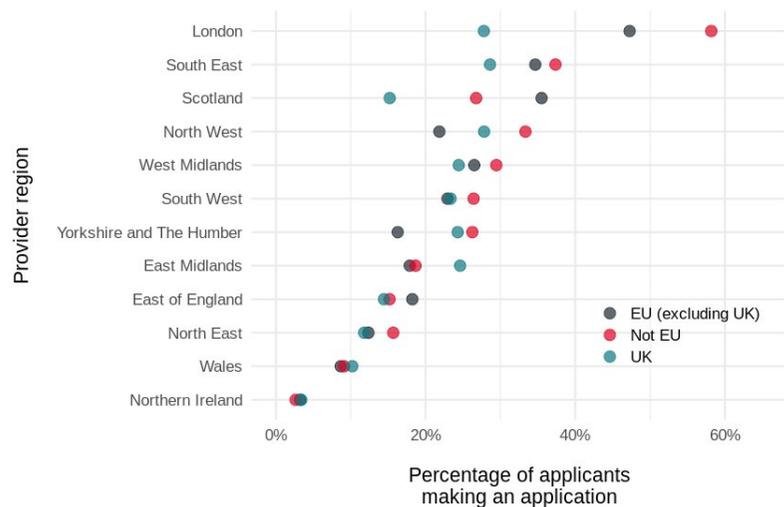


FIGURE 5: Applicants by domicile to provider countries and regions within the UK in the 2019 cycle

Non-UK applicants are nearly twice as likely to apply to at least one London provider than UK applicants (54.1% vs. 27.8%), and at least one Scottish provider (30.0% vs. 15.2%). Given the funding arrangements, Scotland is particularly popular for EU applicants (35.5% applying). In contrast, non-UK applicants were less likely to apply to the East Midlands.

Additionally, non-UK applicants tend to apply to a greater range of provider regions on average – perhaps not surprisingly, given that a significant proportion of UK domiciled applicants limit their HE choices to those providers close to home.

Non-UK applicants are more likely to apply to higher tariff providers

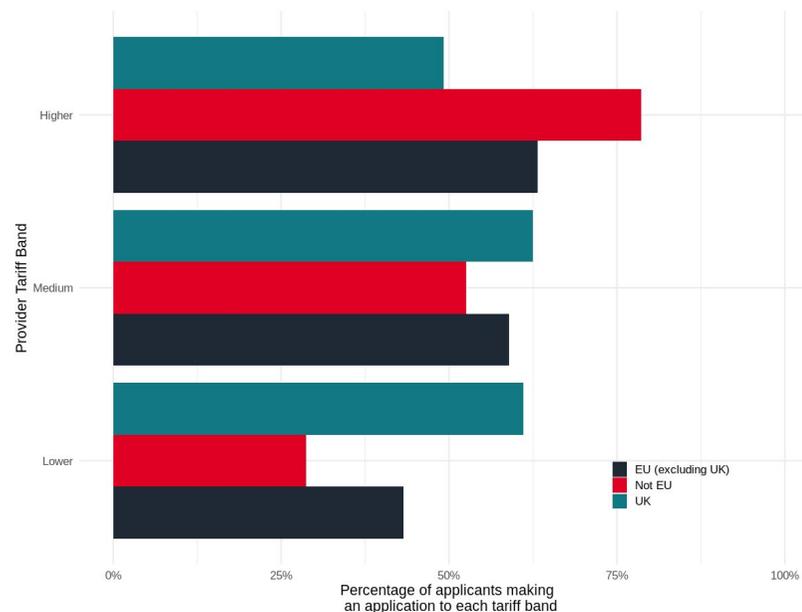


FIGURE 6: Comparison of the proportion of UK and non-UK applicants applying to each tariff band in the 2019 cycle

72.8% of non-UK applicants applied to at least one higher tariff provider in 2019, compared to 49.2% of UK applicants. This may partly help to explain why, as section 3 shows, applicants from outside the UK are more likely to apply by the 15 October deadline.

Of those applicants applying from the EU, 63.2% apply to a higher tariff provider, compared to 78.6% for those outside the EU.

54.1%
OF NON-UK APPLICANTS
APPLY TO LONDON

KEY MARKET FOCUS

Part of the difference in applying to higher tariff providers is attributable to China. 87.1% of their applicants apply to at least one higher tariff provider.

This is in keeping with other South East Asian countries. For example, Singapore (93.5%), Malaysia (89.8%), Hong Kong (85.2%), and Thailand (83.0%) have large proportions of applicants applying to higher tariff providers.

Inside the EU, several countries such as Portugal (69.7%), Lithuania (67.8%), and Romania (61.4%) have higher proportions of applicants applying to lower tariff providers compared to the UK (61.0%).



Online reviews and prospectuses are important

In terms of the resources applicants use to make their decisions²⁰, 'online reviews of universities by other students' and 'university prospectuses' were the most important for non-UK applicants responding to UCAS' 2019 new applicant survey sent shortly after they submitted their application.

The same factors are also important for UK respondents, but they find 'university open days' more valuable. This is expected, as just over a quarter of non-UK respondents (many of whom are domiciled at some distance from all UK HE providers) report having attended an open day²¹.

This highlights the necessity for universities and colleges to make adequate provision for potential non-UK applicants who may struggle to attend open days. This might include in-country visits, virtual open days, and the capacity to schedule informal visits outside the open day calendar.

In addition, Unibuddy's peer-to-peer service, now embedded on ucas.com, also offers a way for applicants to ask questions to current students – enabling non-UK students to make links with like-minded students already on campus. 64% of students said the ability to connect with other international students influenced their university decision²²

²⁰ The question asked was 'When deciding which universities and colleges to apply to, how important were the following resources?'

²¹ The question asked was 'Did you attend any university or college open days before completing your application?'

²² www.internationalstudentsurvey.com/international-student-survey-2018/

3. APPLICANT JOURNEYS

Section 3 focuses on how non-UK applicants apply to UK HE through UCAS. Understanding the key features of non-UK application journeys supports the provision of optimal guidance to these students prior to, and during, the application process.

Fewer than half of non-UK applicants apply independently

In 2019, 45.7% of non-UK applicants applied independently. This proportion has been slowly decreasing over time; in 2014, 48.6% applied independently. However, due to rising numbers of non-UK applicants, a record 64,410 applied independently.

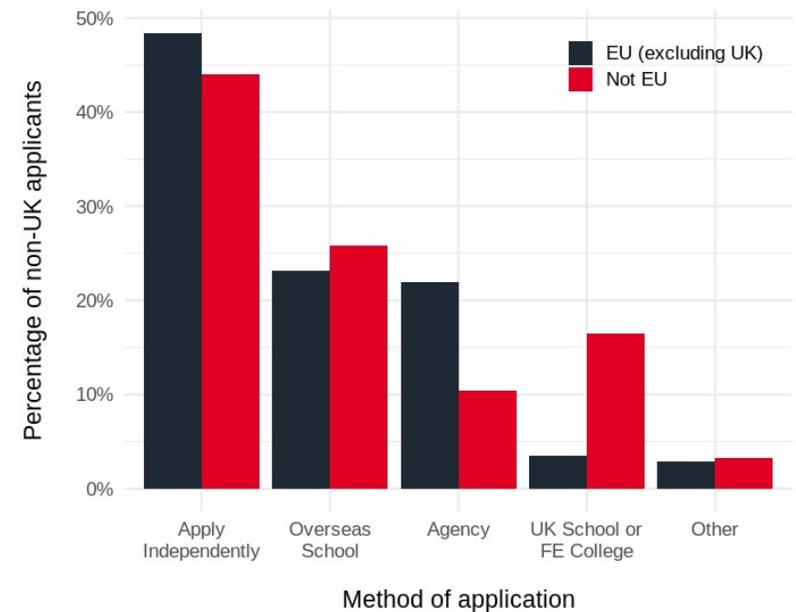


FIGURE 7: The methods used by non-UK applicants to apply in the 2019 cycle

Additionally:

- > 34,980 applicants applied through overseas schools (24.8% of all non-UK applicants)
- > 20,750 (14.7%) used an agency
- > 16,405 (11.6%) applied through a UK school or FE college

The latter point highlights that many non-UK applicants receive schooling in the UK. A much larger proportion of non-EU applicants applied through a UK school or FE College (16.5%) compared to those from the EU (3.5%)

KEY MARKET FOCUS

The proportion of applicants from China applying through a UK school is particularly high (21.3% in 2019). This may reflect the broader appeal of UK tertiary education provision to this group of applicants, and an intention to complete both Level 3 qualifications and HE in this country.

Acceptance rates are highest from UK schools or FE colleges

Acceptance rates vary substantially with application method.

Perhaps reflecting the available level of support, or a stronger commitment to continue studying in the UK, non-UK applicants applying through UK schools or FE colleges had the highest acceptance rate (70.8%) in 2019.

In contrast, the acceptance rate of those applying independently was the lowest, at 48.0%. The acceptance rates from agencies and overseas schools were 59.9% and 53.8% respectively.

It is important to note that 'acceptance' indicates that an HE provider has made the applicant an offer of a place, and the applicant has subsequently accepted this offer. The lower acceptance rates for non-UK applicants not applying from UK schools are likely to reflect, at least in part, a higher proportion of applicant decisions to pursue HE in other countries.

The use of agents continues to increase in 2019

The use of non-UK applicants applying through a UCAS registered agent²³ has slightly increased from 2018 (by 0.4 percentage points to 14.7%).

In 2019, there were 315 active agents (UCAS registered agents with at least one applicant applying through them), up from 300 in 2018.

A total of 21.9% of EU applicants applied through an agent in 2019, compared to only 10.4% from outside the EU. This represents a partial picture of use of agents in UK HE admissions and recruitment.

KEY MARKET FOCUS

A smaller proportion of UCAS applicants from China use agents (10.3% in 2019). In contrast, 26.5% of applicants from India applied through agents in 2019.

²³ The focus of this report is on agent-supported applicants applying through an agency set up as a UCAS registered centre. Other applicants will be using the services of agencies without their applications being linked to a UCAS registered centre, for various reasons – currently, we are not able to report on these agent-supported applicants. A key outcome of the UCAS agent portal work will be to enable advisers to support applicants more consistently and easily. This, in turn, will enable a greater degree of transparency and accuracy of reporting on agent-supported applications in future cycles.



Non-UK applicants are more likely to apply by the 15 October deadline

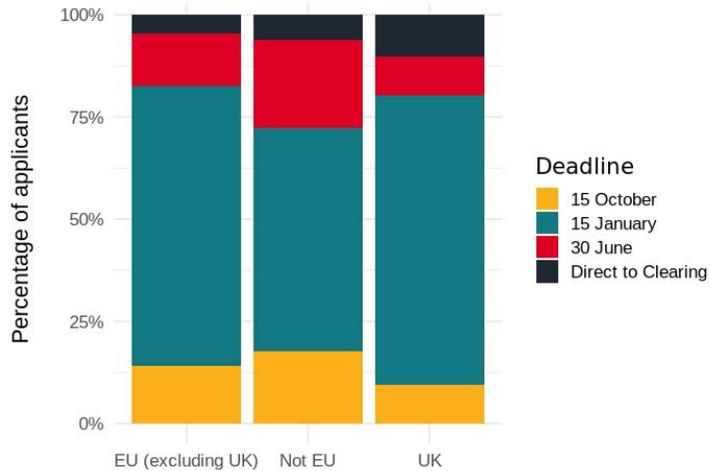


FIGURE 8: The proportion of applicants applying by different deadlines for each domicile in the 2019 cycle

A substantially higher proportion of non-UK applicants apply by the 15 October deadline, when compared to UK applicants. Courses with a deadline of 15 October tend to be more competitive²⁴, and include medicine, dentistry, and veterinary science/medicine, and all courses at the universities of Oxford and Cambridge.

As explored in section 2, non-UK applicants (particularly those outside the EU) are more likely to apply to higher tariff providers which more frequently have courses with a 15 October deadline. On the other hand, fewer non-EU applicants apply before the 15 January deadline, compared to those from the UK or EU.

²⁴ www.ucas.com/file/192856/download?token=k6ULRe_h

²⁵ Figures from the 2019 new applicant survey. The questions asked were 'This year, have you applied, or do you intend to apply, to study at a university or college in the country where you currently live?' and 'This year, have you applied, or do you intend to apply, to study in countries other than the UK or the country where you currently live?'.

Non-UK acceptances are less likely to be through Clearing

In general, the routes in which non-UK applicants get accepted are similar to those in the UK. However, the UK has a higher rate of Clearing acceptances at 14.2%, compared to 9.4% of non-UK acceptances. On the other hand, 81.9% of non-UK acceptances are through the main scheme, compared to 77.3% of UK acceptances, perhaps reflecting the additional time that non-UK applicants require to apply for a student visa.

Non-UK applicants are less likely to reapply

Proportionately, UK domiciled applicants are more likely to reapply. 11.0% of all UK domiciled applicants who applied in the 2019 admissions cycle also applied in 2018. The EU re-applier proportion is 6.6% – a marginal increase from 6.3% in 2018, but beneath the high of 8.0% seen in 2011. The non-EU re-applier proportion stands at 6.9%, unchanged from 2018.

Non-UK applicants are less likely to continue their application past the point of offer

As noted previously, many non-UK applicants are also considering HE in their own country or in countries other than the UK. This is one reason why their post-application decisions may differ from UK students, as shown in figure 9.

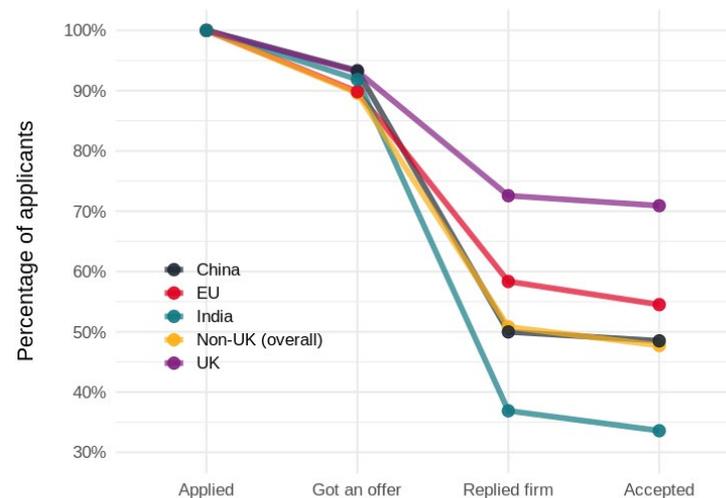


FIGURE 9: The proportion of applicants applying, getting an offer, replying, and being accepted by a main scheme route for different applicant home domicile locations – main scheme applicants only in the 2019 cycle

While non-UK applicants are only slightly less likely to receive an offer than UK applicants, they are much less likely:

- > to reply to an offer as a firm choice
- > to be accepted by the end of the cycle

This likely reflects the fact that many non-UK applicants are also applying to countries other than the UK. In addition to the insight on non-UK choices provided in section 1, our survey data showed 58% of EU respondents, and 65% of non-EU respondents, applied to another country or their own²⁵.

KEY MARKET FOCUS

Applicants from India, in particular, are notably less likely to reply to an offer as a firm choice. In 2019, only 40.2% of applicants from India receiving at least one offer made a firm choice. This figure was higher for China, at 53.6%.

Survey respondents from India (68%) and China (69%) were both likely to report applying to another country, or their own.

²⁶ Figures from the 2019 placed applicant survey. The question asked was 'How happy, or unhappy, were you with your experience of using UCAS to apply to university or college?'. 'Happy' refers to applicants having chosen 'Extremely happy', 'Mostly happy', or 'Slightly happy'.

²⁷ The question asked was 'How easy, or difficult, was it to get all the information and advice you needed from UCAS to support you through the application process?'. 'Easy' refers to applicants having chosen 'Extremely easy', 'Mostly easy', or 'Fairly easy'.

At the end of the cycle, the overwhelming majority are happy with their UCAS application experiences

UCAS survey data provides insight into non-UK applicant experiences of applying through UCAS.

Most non-UK placed respondents are happy²⁶ with their experience of using UCAS (EU – 96%, non-EU – 95%). These respondents use the words 'easy', 'simple', and 'clear' to describe their experiences of using UCAS to apply to university or college. In addition, most found it easy to get the information/advice they needed²⁷ (EU – 86%, non-EU – 87%).

CONCLUSION

HE has a long history of collaboration across borders. Over the past decade, non-UK applicants comprise increasing proportions of students entering UK HE. At the same time, the UK faces increased competition for its share of the growing global market.

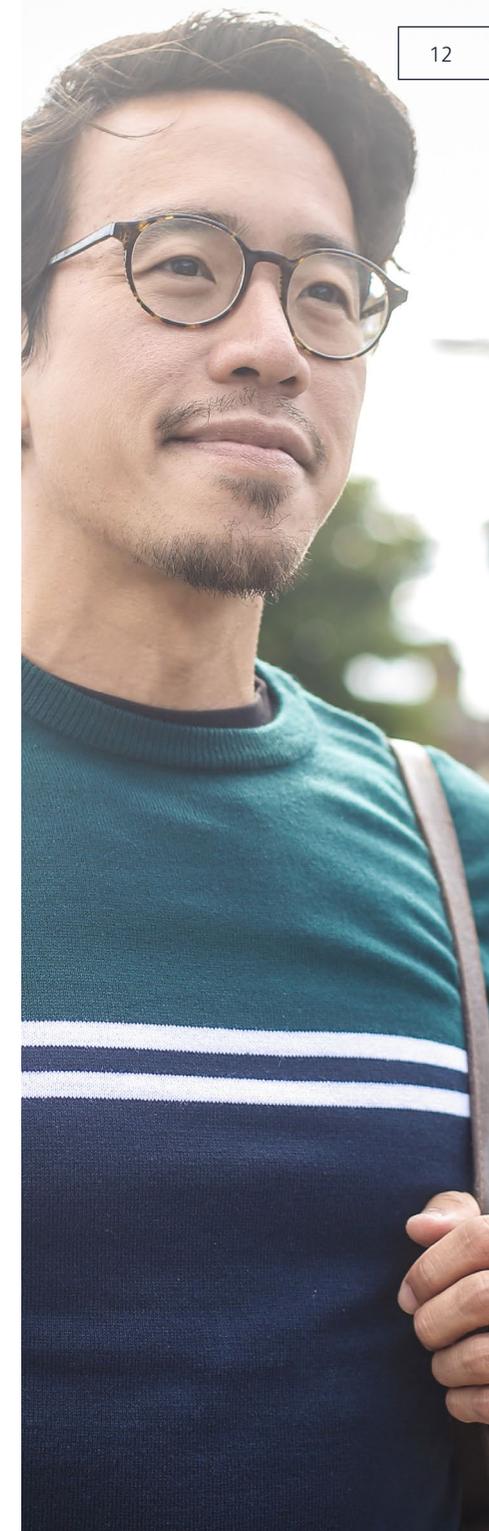
The globalisation of the HE market can only be a good thing for students – expanding opportunity and choice. Encouragingly, it shows that UK and non-UK applicants consider very similar factors when deciding which UK universities and colleges to apply to. However, the resources used by non-UK applicants for decision-making, the subsequent choices made, and journeys through the application process differ – to varying degrees – from those of UK applicants. The provision of guidance and support tailored to this applicant group remains crucial in supporting their continued entry to UK HE.

The data indicate that UK providers are entering a period of increased opportunity. Continuing to offer world-leading HE provision will require attracting and recruiting students from non-typical markets, through both established networks (agents and non-UK Apply centres), and new, innovative, digital channels.

There is increased potential for transnational partnerships, although this is taking place in an environment in which competition is no longer solely national.. How well our universities and colleges capitalise on this growing market, and effectively navigate, or avoid, volatility in overseas demand, will be critical in continuing the UK's world-class higher education provision.

“

I THINK UCAS IS A GREAT CENTRAL HUB FOR UNIVERSITY, AND THE SERVICE THEY PROVIDE IS INTUITIVE AND WELL SEGMENTED”, NON-UK RESPONDENT



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