

UCAS

WHERE NEXT?

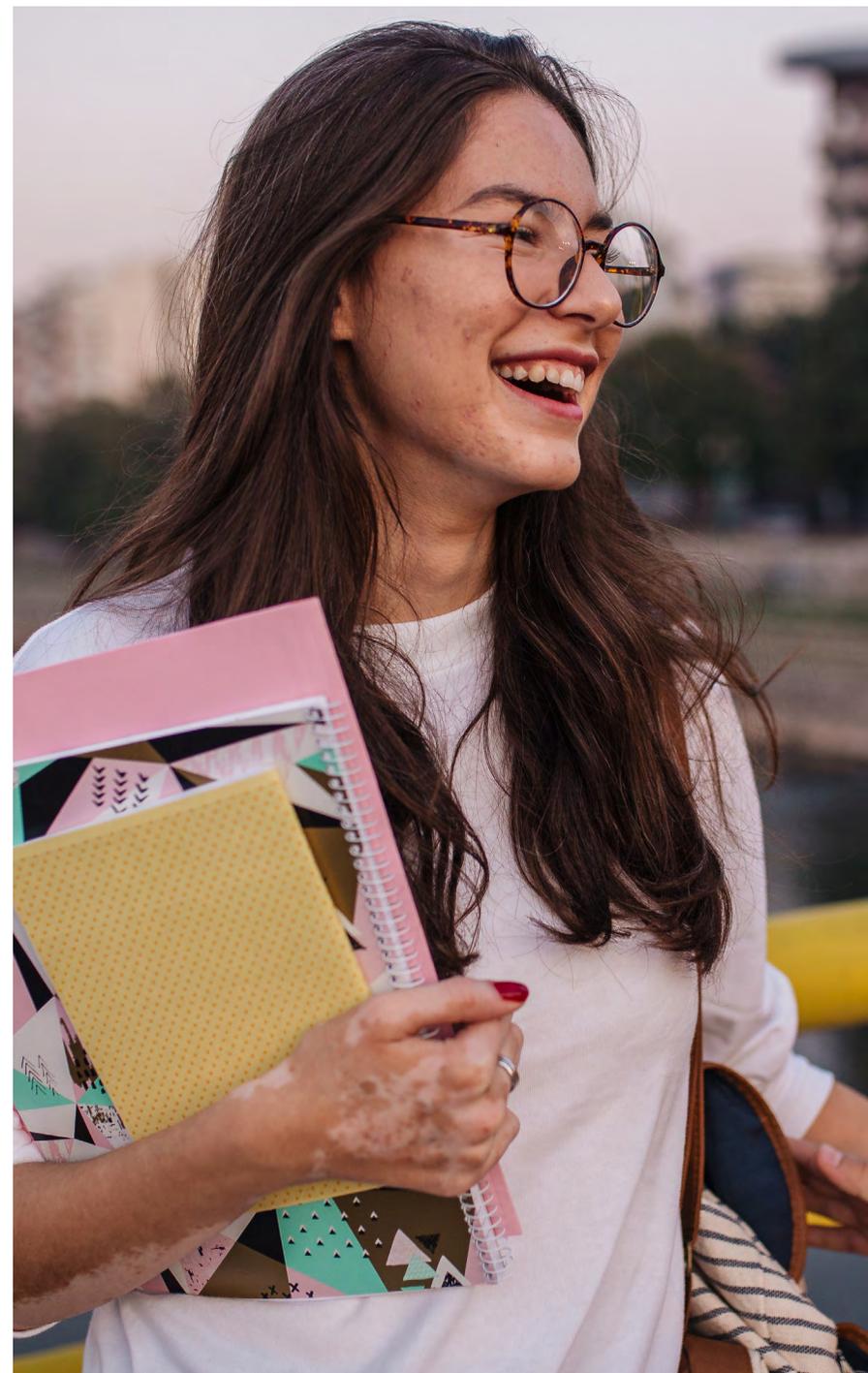
WHAT INFLUENCES THE
CHOICES INTERNATIONAL
STUDENTS MAKE?

 CollegeBoard



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FOREWORD BY COLLEGE BOARD



LINDA LIU
VP, INTERNATIONAL
COLLEGE BOARD

Prior to March 2020, there did not seem to be an end in sight for global student mobility which was projected to grow to 9 million by 2030. In March 2020, the world went into a tailspin as borders closed, businesses lowered their shutters, and students were sent home. Many wondered if this was the end of global student mobility as we knew it. While the pandemic has changed so much in all aspects of our lives, there are some things that it did not change. Among the things that didn't change is student interest in studying outside their home borders. Based on annual surveys conducted by the College Board, 83% of international students in 2020 and 93% of students in 2021 reported that they are interested in studying outside their home country. This compares to 82% immediately before the pandemic¹.

To continue supporting international students on their journey to university or college, the College Board remains committed to offering our programmes, including the **SAT** and **Advanced Placement (AP)** in as many locations as feasible. During the COVID pandemic, the College Board had to cancel administrations of the SAT globally and temporarily transition to digital delivery of AP exams to ensure the health and safety of students and educators all over the world. UCAS took measures to enhance its support for students and flexed its systems and processes, and many universities and colleges introduced flexible admissions policies in response to this disruption.

As we emerge from the pandemic, access to the SAT is being restored with 93% of SAT test centres outside the US able to open in the 2021-22 academic year and participation in the AP outside the US at historic levels. Students remain interested in using these globally

recognised qualifications to apply to universities and colleges that they are interested in. Starting in March 2023, the College Board will also be delivering the SAT digitally at all test centres outside the US to further ease the experience of earning this credential and supporting students on their journey to university or college outside their home borders.

While student interest in studying outside their home country remains strong, the pandemic has impacted how students and families are making decisions and the factors driving student decision making. Concurrently, competition for international students continues to intensify not only among destination countries, but home countries looking to retain talent particularly as the true end of the pandemic remains uncertain. The College Board is so pleased to be able to collaborate with UCAS on this research which brings to bear the extensive reach that both organisations have with prospective international students targeting the two largest destinations for international students. As universities and colleges all over the world consider further innovations to diversify and grow their international student populations, we are hopeful these insights will help inform a student-centric approach as a new normal is being designed.

We would like to extend a special thank you to the UCAS and College Board teams for their excellent work on this informative study. It was a joy working with the joint team on this.

¹ College Board annual survey of international students, 2019, 2020, 2021

EXECUTIVE SUMMARY

Higher education is a global and growing industry. At present, 5.6 million students² – equivalent to the population of Singapore – study in a country different to their home nation. This has grown 250% since 2000³, and is forecast to grow as high as 9 million in 2030⁴ – equivalent to the population of Austria. Within the UK alone, **UCAS** – the UK’s shared information, advice and admissions service – forecasts that the volume of international undergraduate applicants will increase 46% to 208,500 by 2026.

The pandemic brought with it well-known challenges for international student mobility. However, international students showed great resilience, with millions of individuals continuing to follow their dream of studying in a foreign country. During the pandemic, over 155,000 international students chose the UK as their destination of choice and begun their undergraduate studies⁵ with 88% of international applicants continuing to see the UK as a positive or very positive place to study⁶.

Similarly, our partners for this report – **College Board** – reported 84,000 students took 176,000 Advanced Placement (AP) exams in 2021, a record in the history of the programme and exceeding pre-pandemic participation by 4%. This signifies a stronger than ever interest in engaging with rigorous coursework that will open the door to nearly every university or college in the US, UK and more than 500 universities and colleges across 85 other countries.

The report provides new insight on the attributes and mindset of undergraduate international students. In the context of growing international competition, its unique focus is to explore the pathways followed by international students applying to the UK *alongside* other global destinations. It builds upon UCAS’ January 2022 research, ***Where next? The experience of international students connecting to UK higher education***, and brings together UCAS data and findings from a joint UCAS / College Board survey⁷.

Our research shows that 70% of the international students that apply or are planning to apply to the UK also consider another nation – but what does their decision-making process look like? What, and who, influences their decision to apply to, and choose between, destinations? And, with UCAS forecasting that **annual demand from international students could reach more than 200,000 by 2026**, what can we learn from this cohort to promote diversity in our classrooms across the world?

² <http://uis.unesco.org/en/uis-student-flow>

³ <https://iie.widen.net/s/g2bqxwkwqv/project-atlas-infographics-2020>

⁴ <https://www.holoniq.com/notes/196b-international-education-market-set-to-reach-433b-by-2030>

⁵ Non-UK accepted applicants through UCAS in 2020 and 2021

⁶ <https://wwwucas.com/file/560406/download?token=TnQfUxAL>

⁷ See Annex A for technical notes.



Key findings and new insight include:

- ▶ **Aspirations are shaped in early years:** More than 1 in 10 international students are considering HE abroad before their eleventh birthday.
- ▶ **Many are following in their parents' footsteps:** Around half (47%) say that parents / guardians or close members of their family have previously studied abroad.
- ▶ **Motivation differs by nation:** Nigerian students are most interested in gaining skills to support them in their career (chosen by 80% of Nigerian respondents); meanwhile, for Indian students, the most important factor is that HE options are of 'better quality' (75% of respondents from India).
- ▶ **Global HE has something for everyone:** Prospects after graduation appear to be more important for those wanting to study in the US (57%), Singapore (54%) and the UK (54%); whereas experiencing life in that country is more important to those considering Italy (75%) and the Netherlands (72%).
- ▶ **International students are highly independent:** More than half say that it was their own research that informed their choice of country of study; 1% reference teachers and 2% name education agents. In addition, around two thirds (69%) of international applicants applying to the UK say they are intending to self-fund, relative to 4% of domestic students.
- ▶ **University or college choice comes ahead of subject,** whilst the reverse is the case for domestic students: Quality (+13ppts) and reputation (+17ppts) of university or college are more important than the equivalent metrics for field of study. 55% of placed international students enter higher tariff providers in the UK (+27 ppts on UK students).

- ▶ **International students are focused on their choice of subject:** Among the five most popular subject areas, 54% of the international cohort is accounted for, relative to 42% of the equivalent UK cohort. Further College Board research indicates that 57% of international students are interested in studying STEM subjects⁸.
- ▶ **Students want to hear from students:** Open days (40%) and interaction with current students (39%) are increasingly used by students considering overseas study.
- ▶ **Students are considering their future home:** Individuals are five times more likely to rank landing a job in their destination country, relative to their home nation, as their top priority.
- ▶ **China dominates, with some signs of diversification:** Around two in nine international acceptances to UK higher education (HE) are from China, but new markets are emerging with Nigeria (+102%) and Pakistan (+59%) seeing notable increases since 2016.

At the heart of UCAS' strategy, **Discover Your Future**, is our ambition to connect the world to UK HE - UCAS is the single largest channel for international students entering undergraduate UK study. Over the past decade, we have helped 1.3 million students from over 200 countries and territories around the world secure their place in HE⁹. In addition, **Myriad by UCAS** is now live. It provides a single postgraduate platform under the independent UCAS brand, allowing international students to search for universities and colleges, postgraduate taught (PGT) courses, accommodation, part-time jobs, and get matched to scholarships, all in one place, available in 15 languages.

Meanwhile, the College Board helps more than seven million students prepare for a successful transition to college through programmes and services in college readiness and college success. This includes qualification programmes like the SAT which is administered in more than 188 countries and regions outside the US, making it the most accessible university or college entrance exam in the world, and AP courses and exams which reach students in more than 2,600 schools across nearly 130 countries and territories outside the US. Also central to the organisation's work is **Big Future**, a university and college and career planning platform that allows students to explore post-secondary options and receive in-depth, free guidance on applying to universities and colleges.

⁸ College Board analysis of 2021 graduating cohort who took SAT at some point during secondary or high school education

⁹ Approximately 95% of undergraduate entrants from the EU, and 60% of entrants from outside the EU, apply through UCAS

NEXT STEPS

To help ensure we continue to inspire and support international students to cross borders and study outside of their home country, we propose the following next steps for the education and training sector.

The next update to the UK's International Education Strategy (IES) should endorse a nation-specific and action-led approach to promoting UK HE:

- ▶ Grow nation-level intelligence as to the different values, motivations and interests held within key markets e.g. the priority countries identified within the **IES update**.
- ▶ Align individual university and college and national campaigns, including **Study UK**, **Scotland is Now** and **Study in Wales**, to diversify the UK's appeal, widening the range of countries from which international students are recruited.
- ▶ Prioritise peer-to-peer engagement, allowing prospective students to connect to individuals from their home nation as well as those studying their chosen subject and university or college.

Grow global and lasting networks and partnerships through organisations such as the International Association of Admissions Organisations (IAAO) and College Board to create a community of good practice:

- ▶ Co-promote international study as a transformative life experience, with a multitude of components beyond the classroom including work, cultural integration, and global network building.

- ▶ Monitor and communicate significant changes in international strategies worldwide, recognising their interrelationships.
- ▶ Increase recognition of global qualifications such as programmes like SAT and AP offered by the College Board in facilitating student mobility, both in terms of their reach and role in preparing students for their next steps.

Create a personalised applicant experience for international students to meet their unique needs:

- ▶ Provide personalised information and advice to international applicants through the **UCAS Hub**, tailoring content to each nation, and **Myriad by UCAS**, which offers multilingual and interactive guides for students based on key touchpoints in their research journey.
- ▶ Build in greater flexibility within application services, both **UCAS** and **Myriad by UCAS**, to enable applicants to apply at the right point in time for the individual, mindful of the different secondary or high school and tertiary education systems that operate across the world and the programmes and qualifications which may unite them.
- ▶ Capture a broader range of equalities data and contextual information about the background of international students to better target financial and pastoral support.
- ▶ Diversify both the subject range and type of provision targeted at international students to attract more individuals from a broader range of domiciles to study overseas.





Demonstrate the outcomes – knowledge and skills – students can expect to achieve through international HE study:

- ▶ Acknowledge **the importance of data about outcomes** for international graduates in growing the evidence base for the UK's competitive advantage.
- ▶ Enhance the post-graduation tracking of international students to capture more robust data about their outcomes, including those who do not remain within the UK.
- ▶ Develop a strategic approach, within universities and colleges, to supporting the employability of international students and graduates.

Develop, mature, and promote the Graduate route and the High Potential Individual (HPI) Visa route so that students can access post-study job opportunities in the UK:

- ▶ Provide clear and accessible information and advice about the Graduate and the HPI routes via tools including the **UCAS Hub** and links to third party expert bodies such as UK Council for International Student Affairs.
- ▶ Consider how to streamline admissions and VISA application processes via UCAS.
- ▶ Monitor the uptake of the Graduate and HPI routes and its impact on the UK's attractiveness as a destination for HE study and employment.

SECTION ONE

WHO ARE THE INTERNATIONAL STUDENTS WHO APPLY TO THE UK?

HIGHLIGHTS

EMERGING MARKETS ON THE RISE

Nigeria, Pakistan, Hong Kong, Ireland, and the US all see recent surges in applicants, while India and China remain strong

ASPIRATIONS ARE HIGH

More than 70% of placed applicants from Singapore, China and Malaysia enter higher tariff providers

CHOICE PATTERNS VARY BY DOMICILE

Applicants from China and Singapore are five times as likely to make five choices to higher tariff providers, whereas applicants from the US and Saudi Arabia are more likely to make one choice to a higher tariff provider



UCAS is the single largest channel for international students entering UK higher education (HE). UCAS' application data provides an overview of how the number of international students applying to undergraduate courses at UK universities – especially from countries outside of the EU – has continued to grow in recent years. More than 70,000 international students were accepted onto UK HE courses through UCAS in 2021 – making up 12.5% of total acceptances.

China dominates, with some signs of diversification

UCAS research published in January 2022 highlighted the strength of key markets, finding that more than half of placed undergraduate international applicants that commenced studies in the UK in 2021 came from seven countries. Similarly, around two in every nine international placed applicants that entered UK HE in 2021 are from China. Consequently, nine UK universities and colleges recruit more than 10% of their intake from China, with this rising to 27 when we segment to business and management courses.

In recognition of this, and mindful of the recent 50% drop-off in EU recruitment following the UK's withdrawal from the EU, universities and colleges in the UK have increasingly sought to diversify their recruitment both across, and within nations.

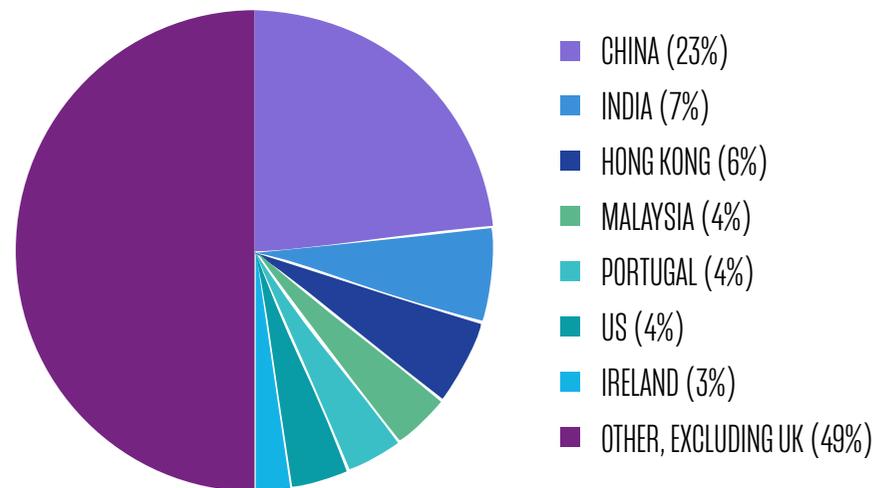


Figure 1: Make-up of 2021 international UCAS placed applicants by domicile

The largest increases in applicant numbers¹⁰ in the last ten years have come from China (+18.8k, +195%), India (+6.8k, +222%), and the US (+4.8k, +165%) – these are also the top three largest international markets and among the ten markets with the largest proportional growth¹¹. The next to feature among the top markets for both raw and proportional growth is the UAE – a 247% increase since 2011 (+2.1k), followed by Turkey with a 233% growth (+1.1k), and South Africa with 229% growth (+0.6k).

Looking at more recent surges in demand, or resurgences, Nigeria features within the top ten markets for five-year demand increase (+1.7k, +102%), as does Pakistan (+1.1k, +59%). Some new markets emerge when examining increases over the last two years, with Hong Kong (+1.3k, +23%) and Ireland (+1.2k, +29%) seeing notable increases since 2019. The US has had an unexpected surge in demand just in the last year, as reported in our **January report**, with the second largest proportional one-year increase (+2.7k, +53%) after Nigeria.

The priority markets announced in the **2021 update to the International Education Strategy** have seen varied results in demand for UK HE. India and Nigeria, as mentioned above, have seen strong growth in recent years, as has Saudi Arabia, which has seen an increase of 50% (+500) since 2016. Indonesia has seen an increase of 191% (+525) since 2011, although progress has since slowed somewhat. Vietnam has not had the same level of interest, with demand mostly declining in the last ten years, notwithstanding a 2020 uplift of 20% (+75).

¹⁰ Absolute change in main scheme applicants, <https://www.ucas.com/data-and-analysis/undergraduate-statistics-and-reports/ucas-undergraduate-sector-level-end-cycle-data-resources-2021>

¹¹ Proportional growth in main scheme applicants for home countries/regions with 500 or more main scheme applicants in the 2021 cycle.

TOP 5 PROPORTIONAL GROWTH – 10 YEARS			TOP 5 PROPORTIONAL GROWTH – 5 YEARS			TOP 5 PROPORTIONAL GROWTH – 2 YEARS		
UAE	+247%	+2,050	INDIA	+131%	+5,625	NIGERIA	+101%	+1,685
TURKEY	+233%	+1,050	CHINA	+128%	+15,970	INDIA	+60%	+3,710
SOUTH AFRICA	+229%	+595	NIGERIA	+102%	+1,690	US	+56%	+2,740
INDIA	+222%	+6,835	TURKEY	+91%	+715	CHINA	+44%	+8,670
EGYPT	+206%	+535	UAE	+89%	+1,360	ZIMBABWE	+40%	+215

TOP 5 RAW GROWTH – 10 YEARS			TOP 5 RAW GROWTH – 5 YEARS			TOP 5 RAW GROWTH – 2 YEARS		
CHINA	+195%	+18,770	CHINA	+128%	+15,970	CHINA	+44%	+8,670
INDIA	+222%	+6,835	INDIA	+131%	+5,625	INDIA	+60%	+3,710
US	+165%	+4,765	US	+89%	+3,610	US	+56%	+2,740
HONG KONG	+62%	+2,710	NIGERIA	+102%	+1,690	NIGERIA	+101%	+1,685
UAE	+247%	+2,050	UAE	+89%	+1,360	HONG KONG	+23%	+1,315

Artificial intelligence is a top three choice for international students

The most popular subject choices¹² for international and UK students differ, with international students favouring engineering and law, as well as being almost twice as likely to choose business and management, while UK students have more of a focus on healthcare. Here we see that, just among the five most popular subject areas, 54% of the international cohort is accounted for, relative to 42% of the equivalent UK cohort.

INTERNATIONAL		UK	
BUSINESS AND MANAGEMENT	25%	BUSINESS AND MANAGEMENT	13%
ENGINEERING	9%	CREATIVE ARTS AND DESIGN	10%
CREATIVE ARTS AND DESIGN	7%	NURSING	7%
LAW	7%	SUBJECTS ALLIED TO MEDICINE	6%
COMPUTING	6%	COMPUTING	5%

Delving deeper, the three more detailed subject groups¹³ with the highest proportion of international student acceptances are statistics (53%), materials science (39%) and artificial intelligence (38%). In all three instances, international students therefore make-up more than a third of placed students. Conversely, courses accepting the smallest proportion of international students include sport and exercise sciences (4%), adult nursing (3%), health studies (2%) and teacher training (1%).

These trends in subject preference are mirrored by data from the College Board, which includes international students targeting the US – this shows that most international students intend to study science, technology, engineering and mathematics (STEM) subjects or business with 57% indicating an interest in STEM and another 20% indicating an interest in business¹⁴.

Initiatives are underway to increase the diversity of subject areas to which international students apply. For example, at national level, **the Nursing International Recruitment Programme** has supported some signs of recent growth in international applicants to nursing as reported in UCAS' **Next Steps: Who are the 'future nurses'?** research. Equally, sport is one of the pathways that Nottingham Trent University has focused on through its international college partner, Nottingham Trent International College (**NTIC**). Those completing NTIC's Foundation Certificate in Science and Engineering are given the opportunity to access sports science degree programmes, rather than just the traditional science or engineering subjects. Similarly, Sheffield Hallam University are seeking to grow international numbers to their **Sports Engineering MSc** course and Northumbria University has built a suite of programmes to support international students who wish to study and play sport.

¹² Proportion of 2021 international acceptances, and UK acceptances, by Common Aggregation Hierarchy 2 grouped courses.

¹³ Common Aggregation Hierarchy 3 grouped courses, with at least 100 international accepted applicants, <https://www.ucas.com/data-and-analysis/undergraduate-statistics-and-reports/ucas-undergraduate-sector-level-end-cycle-data-resources-2021>

¹⁴ College Board analysis of 2021 graduating cohort who took SAT at some point during secondary or high school education

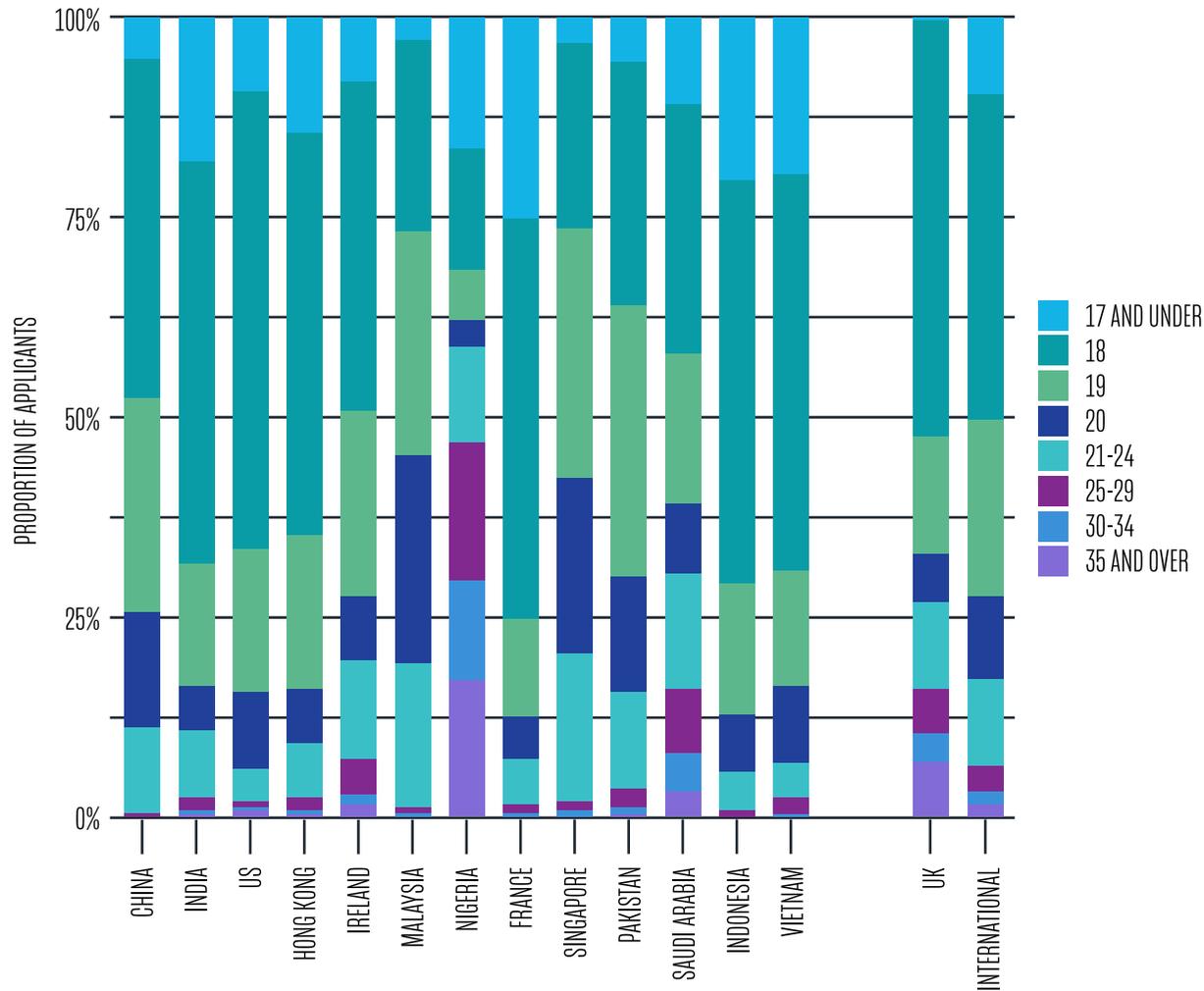


Figure 2: The proportion of applicants by age group, for selected home countries and the average for international applicants

Age distribution is 'flatter' and the gender gap less stark for international students

While 18 year olds still hold the majority, international applicants are typically more likely to be in the 19 – 24 age range than domestic applicants (43% versus 31% respectively), and they are less likely to be in the older age groups i.e. aged 25 and over (6% versus 16% respectively)¹⁵. UCAS applicants under the age of 18 are six times more likely to be living outside of the UK. These trends hold true for the top 10 international markets for UK HE, except for Nigeria, whose age distribution is skewed towards older age groups – nearly half of 2021 Nigerian applicants are aged 25 and over.

The gender divide for international applicants is generally more even than for domestic applicants, with 46% of international applicants being men, in comparison to 41% of UK applicants. This is also the case for applicants primarily targeting the US with the College Board reporting 53% of international students in the 2021 cohort as being male¹⁶. The gender divide swings the other way for some countries including Pakistan (65% male) and India (55% male), but further widens for the US (28% male) and Ireland (28% male). Expanding the range of such equalities data and contextual information captured about international students would improve understanding of their individual circumstances.

¹⁵ Ages are defined on the 31 August of the application cycle year for non-UK applicants, and for English and Welsh applicants. 1 July is used for Northern Ireland and 28 February of the following year is used for Scotland.

¹⁶ College Board analysis of 2021 graduating cohort who took SAT at some point during secondary or high school education

More than half of placed international students enter higher tariff providers

55% of placed international students enter higher tariff providers, relative to 28% of the domestic cohort. This means that a lower proportion of international acceptances are to medium (24% versus 32%) and lower (21% versus 40%) tariff providers. This is likely related to international students' propensity to prioritise university or college choice above field of study, as evidenced by the survey findings within this report.

This trend is even stronger for students from the Asia-Pacific region; namely, Singapore (85% placed at higher tariff providers), Malaysia (74%), Hong Kong (69%) and China (78%). Meanwhile, Irish applicants buck the trend and are most likely to be placed at lower tariff providers (48% placed at lower tariff providers) – their proximity to the UK may see Irish students behave in a similar way to domestic students (40%). Nigerian students are also a relative anomaly, being most likely to be placed at medium tariff providers – this could relate to their stronger focus on skills, above university or college, as discussed below.

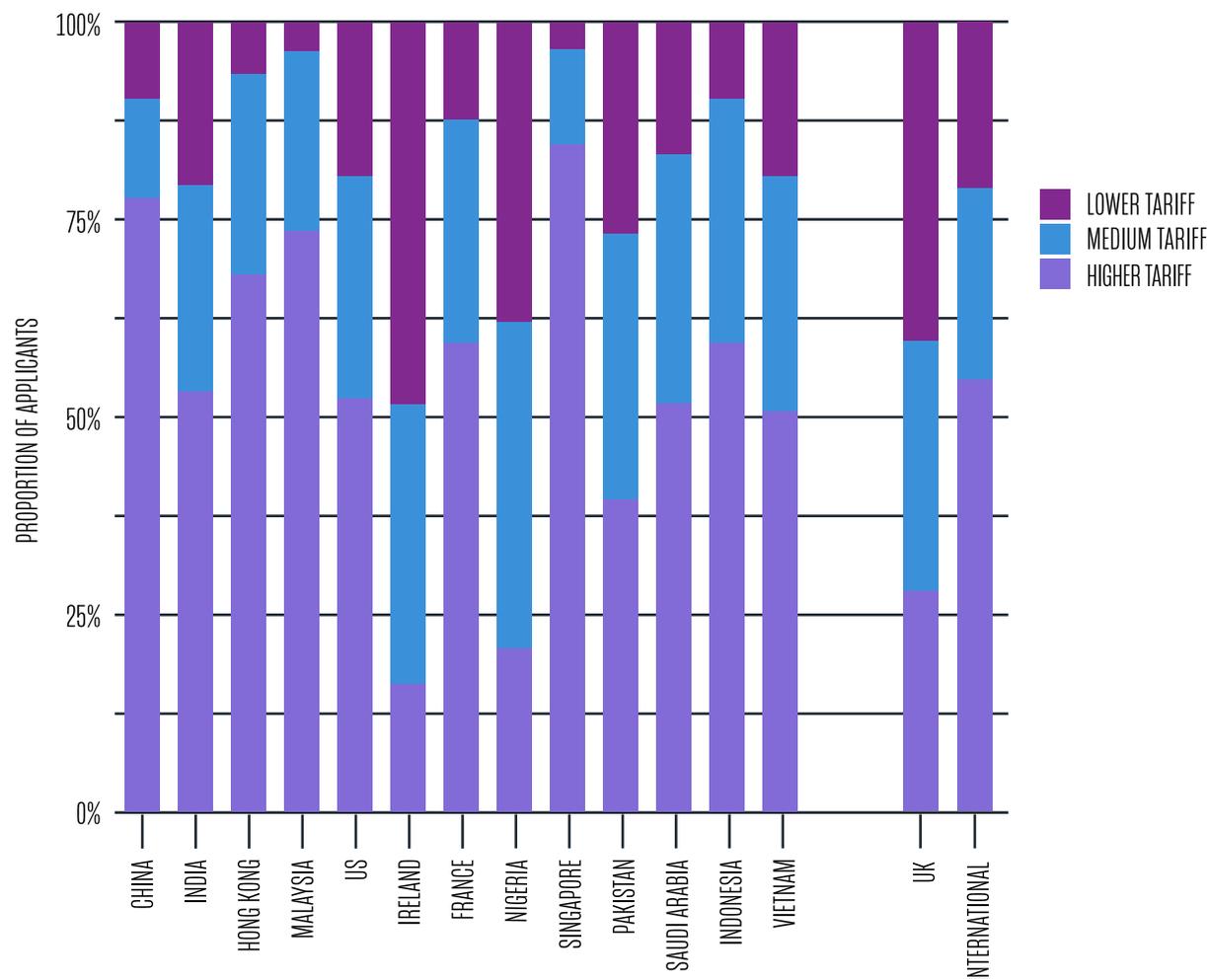


Figure 3: The proportion of accepted applicants by provider tariff group, for selected home countries and the average for international applicants

Typical number of choices varies by domicile

UCAS applicants can make up to five course choices in the main scheme – overall, international students are more likely to use all five of these choices than domestic applicants (76% of 2021 main scheme applicants versus 72%). These choices are more likely to cover a wider range of universities and colleges (17% apply to the same university or college more than once compared to 26% of UK applicants), and cover more regions of the country (67% apply to the same region more than once relative to 77% of UK applicants). When we analyse number of choices by tariff group and high-level domicile, we find that the single biggest subgroup of applicants is international applicants making five choices at higher tariff providers (32% of the international cohort); whereas, only 10% of the UK cohort do the same. These trends are more pronounced for applicants from Pakistan, Malaysia and Hong Kong, who are 1.2 times more likely than home applicants to use all five of their main scheme choices, and China and Singapore, who are over five times more likely to have five choices at higher tariff providers than UK applicants.

Meanwhile, applicants from Nigeria and Saudi Arabia are around twice as likely (2.0 times and 2.2 times respectively) as UK applicants to make just one choice in their main scheme application. This may be influenced by the age profile of Nigerian and Saudi applicants, as mature domestic students are also more likely to only make one choice. If we focus in on the behaviour of those aged 18 or under, it is applicants from the US who have the highest chance of making a single choice to UK HE. Unlike applicants from the UK, US applicants making a single choice are most likely to use it to apply to a higher tariff provider, suggesting that these individuals are highly focused and ambitious in their decision-making.

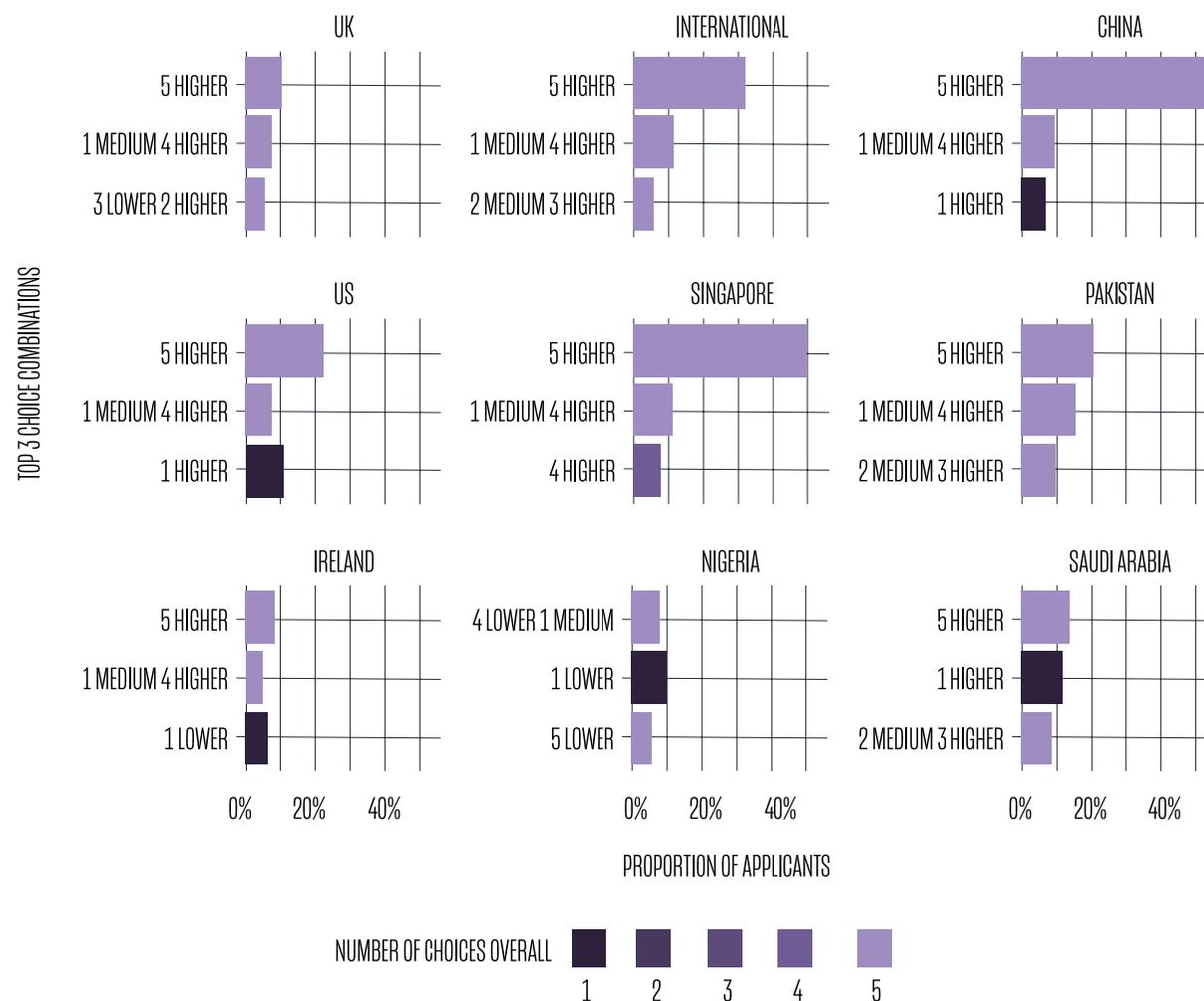


Figure 4: The top 3 combinations of provider tariff in main scheme choices, for selected home countries and the average for international applicants. Combinations are colour coded by the total number of choices in that combination.



The diversity of the global secondary or high school and tertiary education landscape means that the application journey for international students is atypical

While a domestic student, in particular of school-leaving age, may be likely to follow the advice of their teacher or adviser and make their application before the Christmas holidays i.e. in December, this trend is much less common among international applicants, who are more likely to apply close to the deadlines in October and January respectively¹⁷. Clearly, the secondary or high school and tertiary education calendar and higher education application process differ greatly around the world, with specific countries having peaks at different times in the year. This diversity gives a clear message – that information, advice and guidance should be targeted and accessible for every individual's application journey.

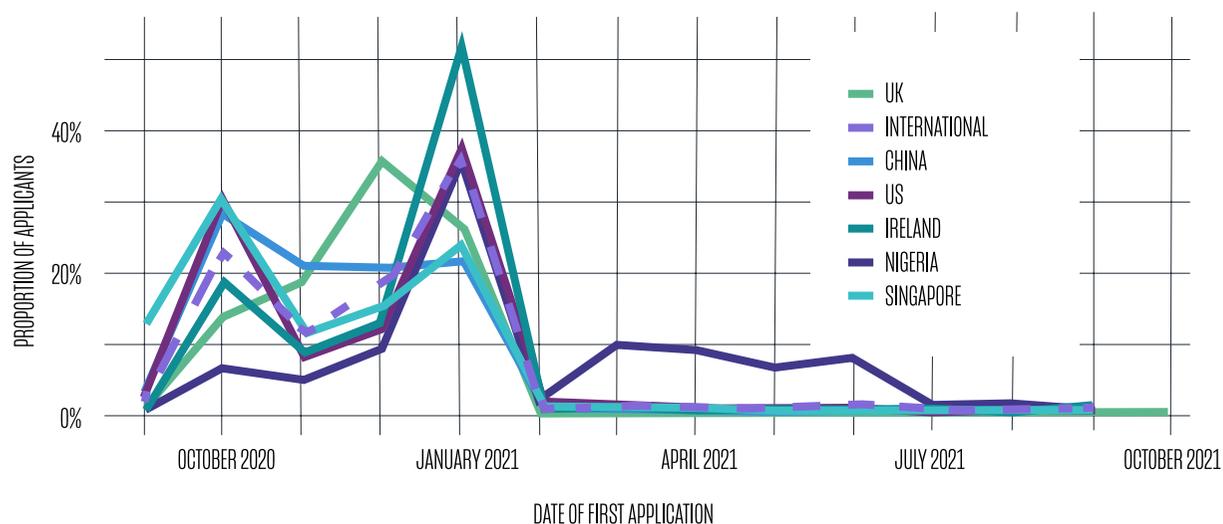


Figure 5: The proportion of applicants aged 18 or under making their initial application by month in the 2021 cycle, for selected home countries and the average for international applicants

¹⁷ Key UCAS deadlines are: **15 October** – any course at the universities of Oxford and Cambridge, or for most courses in medicine, veterinary medicine/science, and dentistry, and **26 January** – for the majority of courses.

SECTION TWO

WHAT DOES DECISION- MAKING LOOK LIKE FOR INTERNATIONAL STUDENTS?

HIGHLIGHTS

DESTINATIONS ARE CHOSEN EARLY

Three quarters of international students decide where they want to study during secondary school / high school

FINANCIAL CONSIDERATIONS COME INTO PLAY

Students choosing the US rank affordability lower in decision-making, and financial aid or scholarships high

STUDENT ACCOMMODATION IS A CRITICAL FACTOR

65% of respondents considered availability of accommodation when choosing their university or college



As part of this research, UCAS and the College Board conducted a joint survey, receiving over 1,200 responses, to learn more about the decision-making process for students applying to HE outside of their home country. In total, we received responses from prospective students based in 116 countries, allowing us to identify both commonalities and differences in perception by domicile.

While most respondents had applied or were planning to apply to study in the UK, 70% of respondents were also considering other HE destinations worldwide. Consequently, we can directly compare the UK's top competitors in the international applicant market and draw valuable insights from this data.

WHEN DO STUDENTS MAKE THE DECISION TO STUDY ABROAD?

Aspirations are shaped in primary years

The age at which students first start seriously considering HE abroad varies widely among individuals. For some, the decision is an early one with more than 1 in 10 considering HE abroad before their eleventh birthday. This chimes with previous UCAS research from the Where Next? series, **Where Next? What influences the choices school leavers make?** that found that aspirations are shaped at an early age with one in three UK school pupils first thinking about HE at primary school. Nonetheless, more than half of respondents (53%), only start thinking about HE options abroad during the final years of their secondary or high school education, likely reflective of the magnitude of the decision to study in a foreign land.

More than 75% of students make their final decision about which country to study in during their secondary or high school education, with only a minority – less than 1 in 10 – deciding later i.e., during the application process.

For international students, university or college choice comes ahead of subject

An important step in the decision-making process of any student is determining their choice of university or college. We know that, for prospective international students, this step typically comes after the initial decision to study overseas and, for the majority, also post determining their destination country.

The next stage of the decision-making process deviates from that which we see associated to domestic students. Whilst **UCAS research** finds that 83% of UK school pupils chose their degree subject before they thought about where they would study it, the reverse is true for prospective international students.

This cohort places greater importance on the quality (83%) and reputation (75%) of the university or college relative to the quality (70%) and reputation (58%) of potential fields of study i.e., subjects.

“ I’M INTERESTED IN PARTICULAR SCHOOLS

“ I’M INTERESTED IN REPUTABLE SCHOOLS FOR THE SUBJECT I WANT TO STUDY

OVERSEAS
STUDY

DESTINATION
COUNTRY

UNIVERSITY
OR COLLEGE

FIELD OF STUDY
/SUBJECT

HOW DO STUDENTS CHOOSE WHERE TO STUDY?

When asked to rank the importance of 12 different factors in informing choice of country of study, the standout factor was the reputation of universities or colleges in their chosen countries – half of respondents ranked this as their number one factor. This builds on findings from UCAS' report **Where next? The experience of international students connecting to UK higher education**, which found that 77% of international applicants to the UK applied because of the UK's strong academic reputation.

“ THE INSTITUTIONS IN THE UK ARE RENOWNED AS WORLD LEADERS IN RESEARCH. I WANT TO APPLY TO MEDICINE, AND I ADMIRE THE NHS

“ QUALITY OF UNIVERSITIES (SCIENCES PO IS THE 2ND BEST UNIVERSITY FOR GEOPOLITICS IN THE WORLD)

The next three most important factors are: reputation of countries as a safe place to study and live, opportunity to experience a different culture, and knowledge of the language. Around a third rated family connections as the least most important factor, dispelling the assumption that international study relies upon patrimony.

Affordability ranks as the sixth most important factor, both overall and for those applying or considering applying to the UK. We know that for the 2021 cycle, around two thirds (69%) of international applicants applying to the UK say they are intending to self-fund, relative to 4% of domestic students. This has increased nine percentage points since 2020, which saw changes to student support arrangements following the UK's withdrawal from the EU.

There is some deviation among destination countries. For those looking to study within the US, Canada, and Ireland (all English-speaking countries) having knowledge of the language is more highly rated. Also, in contrast to the overall ranking, those considering applying to the US or the Netherlands rank post-graduation prospects higher than affordability. Students considering Australia, Canada and the Netherlands accord greater importance to the possibility of being eligible for a post-study work visa.

“ ENGLISH IS MY MOTHER TONGUE; I WANT TO STUDY IN ENGLISH

“ STUDYING AND LIVING IN AN ENGLISH-SPEAKING COUNTRY WILL ALLOW ME TO FIND JOBS THAT MAINLY USE ENGLISH

In slight contrast, based on a 2021 College Board survey of international students where 40% of students are interested in studying in the US, students rated availability of their field of study, availability of financial aid and scholarships, and prospects after graduation as the three most important factors. Availability of financial aid and scholarships has risen in importance since the pandemic with 74% of students rating this as a very important factor compared with 48% of students rating this as a very important factor pre-pandemic¹⁸. This contrast may be partially driven by the generally higher cost at US universities and the longer duration of degree programmes.

¹⁸ College Board survey of international students 2021, 2020, 2019



Location, location, location

Respondents consistently rank geographical location as of importance - one third of respondents select it within their top three most important factors. Delving more deeply into the topic, students are relatively less concerned about proximity to their home country – perhaps incongruously, respondents are 16 percentage points more likely to say that the chosen country being *far* from their home country is attractive (36% vs. 20%).

The two most popular geographical factors relate to the attractiveness of the location with both region (65%) and city / town (61%) highly rated. Once again, family connections are not deemed important – only 21% of respondents say this is attractive.

We also found that international applicants to the UK are more likely to be accepted to major urban areas such as Greater London and Greater Manchester than home students (49% vs 42%)¹⁹, suggesting that big cities, which often have good transport links, may be more popular destinations for internationally mobile students. This finding is also reflected in College Board's research where international students in the 2021 cohort aspired to attend medium sized universities (5-15K enrolled) in large cities²⁰.

Teaching and learning facilities attract international students with accommodation also important

Teaching and learning facilities are rated as the most important amenity of international universities or colleges for more than 8 in 10 respondents, reflecting their focus on achieving a high-quality educational experience. This was closely followed by available accommodation at or near the university or college (65%), signifying the importance of student housing among those who are travelling the furthest, providing a 'home away from home' at this potentially daunting time in their lives. This finding is echoed in other UCAS survey results, with availability of accommodation being ranked the third most 'extremely important' factor for international applicants to UK HE, compared to twelfth for domestic applicants²¹.

¹⁹ Rural-urban classification (2011) of Lower Layer Super Output Areas in England and Wales, ONS Geography.

²⁰ College Board analysis of 2021 graduating cohort who took SAT at some point during secondary or high school education

²¹ New applicant decisions survey 2021, 'How important were the following factors when deciding which universities to apply to?'

Future international students are fiercely independent

Parents and guardians play an important role in supporting students in choosing between potential HE destinations. A quarter of respondents name their parents or guardians as the critical influencer. Interestingly, this aligns with previous **Where Next? research** which found that one in four UK school pupils cite parents or carers as their 'biggest help' when determining their choice of degree course. This means that parents and guardians are universally influential in student decision-making worldwide.

There is a significant distinction regarding the self-reliance of prospective international students and their domestic counterparts. Prospective international students appear highly independent with more than half of respondents saying that it was their own research that informed their choice of country of study, whilst a mere 1% reference teachers and 2% name education agents. This differs to the UK HE applicant cohort, who give teachers' and career advisers' recommendations more weight. It should be noted, however, that the use of education agents still plays an important role in providing information and advice to international students (28% shared that they used agents as an information source when choosing where to study), thus empowering students to make these important decisions for themselves.

“ **MY PERSONAL EXPERIENCE IS THE MAJOR INFLUENCE**

“ **[IT WAS] MOSTLY MY OWN INITIATIVE**

“ **I HAVE DONE MY OWN RESEARCH TO DECIDE WHERE TO APPLY**

“ **NO SUPPORT, JUST MY OWN RESEARCH**



SECTION THREE

WHAT, AND WHO, DRIVES INTERNATIONAL STUDENTS TO STUDY ACROSS BORDERS?

HIGHLIGHTS

LIFE EXPERIENCE MATTERS

The most common motivation for studying abroad is to experience life in a different country (75%)

QUALIFICATION CHOICE IN SCHOOL IS IMPORTANT

7 in 10 respondents say that when making their qualification choices, they considered how this might affect their ability to study abroad.

THE ROLE OF AGENTS DIFFERS BY NATION

Nearly half (49%) of Indian and more than a third (37%) of Chinese students have received support from an education agent, whereas those from Ireland and the US report lower rates of agent support (16% and 23% respectively).



WHY DO STUDENTS CHOOSE TO STUDY ABROAD?

It's not just about the student experience, but life experience

The most common motivation for studying abroad is to experience life in a different country (chosen by 75% of respondents), suggesting that applicants are not solely focussed on the pursuit of academic excellence, but a well-rounded student experience. This finding is mirrored in results from a previous UCAS survey, which found that international applicants to UK HE are 10 percentage points more likely to be interested in meeting new people than home applicants, and 7 percentage points more likely to be interested in experiencing 'university life' and having fun²².

Therefore, it is timely that the Office for Students – the English HE regulator – has recently **announced** its intention to work with Government and UK Council for International Student Affairs to improve international student integration and their non-academic experience. Similarly, a key focus of the new **International Learning Exchange** programme in Wales is to deliver 'personal, career and employability benefits' whilst a **report** from Scottish Government speaks of the 'social and cultural connections' arising from international student recruitment. It is also interesting to note the work of organisations such as **The Student Sport Company**, which helps international students combine their preferred academic qualification with their sporting ambitions at UK universities or colleges.

“ THE CHANCE TO EXPERIENCE A NEW CULTURE

“ WANT A DIFFERENT EXPERIENCE THAN I WOULD HAVE IN MY HOME COUNTRY

“ THE DESIRE TO EXPERIENCE LIFE IN EUROPE

“ WARM WEATHER, INTERESTING ACCENT, BEAUTIFUL NATURAL PARKS...

The second most popular response is the perception that HE options in other countries are 'better quality' (70%). In addition, more than two-thirds (66%) report that they want to gain skills that will support them in their career and 42% of respondents say that graduate employment opportunities are 'better abroad.'

Whilst responses are largely uniform across all domiciles, we do see some regional variations. For example, for students from Nigeria, the most important factor is to gain skills to support them in their career (chosen by 80% of Nigerian respondents), and they are more likely to be interested in employment after graduation (52%); meanwhile, for students from India, the most important factor is that HE options are of 'better quality' (75% of respondents from India). Such variation by domicile mirrors findings from research by **INTO University Partnerships**, which also noted that 81% of Nigerian students 'want to study for a degree that gives me the skills I need for my future; the ranking is far less important to me' – the equivalent percentage for Indian students is lower, at 67%.

²² New applicant decisions survey 2021, 'Why do you want to go to university?'

“ I WANT TO LIVE IN ANOTHER COUNTRY FOR GENERAL LIFE, SO GOING TO SCHOOL THERE AS WELL MAKES THE MOST SENSE

“ THE DESIRE TO EXPERIENCE LIFE IN EUROPE

Global HE has something for everyone

Respondents to the survey were also asked to share why they were considering study in each country they had specified. The varied results reflect the diverse offering of HE right around the globe.

For example, prospects after graduation appear to be more important for those wanting to study in the US (57%), Singapore (54%) and the UK (54%) than in Ireland (36%), France (35%) and Italy (28%). Previous **UCAS research**, focused uniquely on those international students studying in the UK, similarly noted a focus on graduate outcomes with 44% citing ‘to boost my employability’ and 43% ‘opportunities with industry / employers’.

“ WORKING OPPORTUNITIES AFTER GRADUATION

“ ALLOWS EASIER ACCESS TO FIELD [WITHIN WHICH] I WANT TO WORK

Meanwhile, the desire to experience life in that country is more important to those wanting to study in Italy (75%) and the Netherlands (72%) than in Germany (54%) and in Singapore (43%).

MOTIVATION FOR CONSIDERING STUDY IN THIS COUNTRY

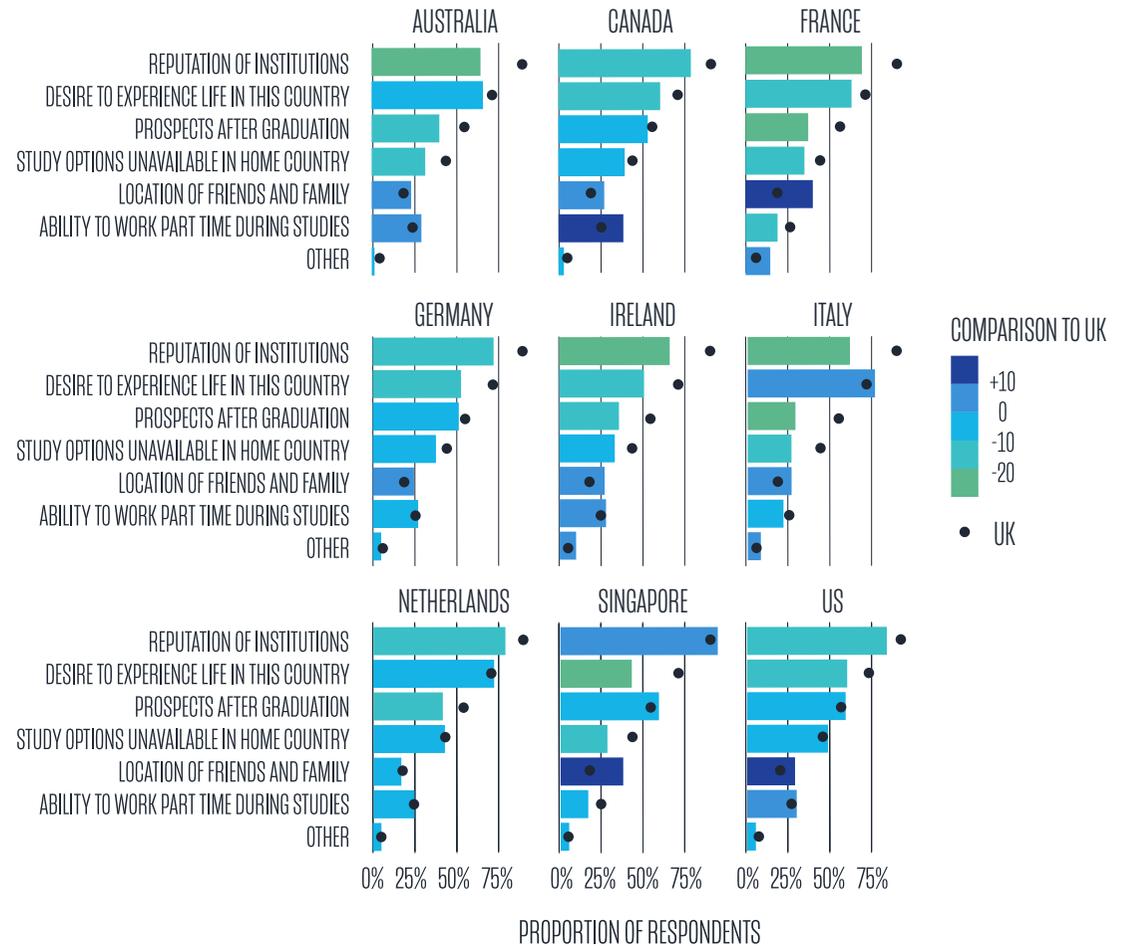


Figure 6: The proportion of survey respondents that selected each destination country, by the motivation for considering that country, with comparison to the results for the UK as a destination

WHO IS MOST INFLUENTIAL IN STUDENT DECISION MAKING?

Many students follow their parents' pathways

When asked about who influenced their decision to consider studying abroad, once again, international students demonstrate their tendency to favour independent research with more than three quarters of respondents (76%) citing this. At this early stage, parents are the second most common influencer (64%) ahead of peers / classmates (33%). In fact, Chinese applicants cite their parents as an even more important influencer than their own research. Again, teachers appear to have less impact (28%), as do education agents (7%).

However, when asked about support received to date as part of the application process, nearly two thirds (60%) advise that their teachers are providing them with information about their HE options and a third talk of using the services of an education agent (33%). Nearly half (49%) of Indian students have received support from an education agent, plus 37% of Chinese students, whereas those from Ireland and the US report lower rates of agent support (16% and 23% respectively).

Once again, aligning with previous **Where Next? research** looking at the journey of UK school pupils into HE, which found a clear synergy between a student's HE subject choice and their parents' or carers' careers, we note that many individuals are following in their parents' footsteps in pursuing HE overseas. Around half (47%) of respondents say that parents / guardians or close members of their family have previously studied abroad.

Students want to hear from students

In common with findings from UCAS' previous **2022 research**, open days (40%) and interaction with current students (39%) are increasingly used by students considering overseas study. This mirrors findings from the **QS Global International Student Survey 2021** where the ability to speak to current students emerged as the top way (43%) to reduce worries among prospective students. Another **recent survey by Educations.com**, found that 63% of prospective students wanted to talk to current students, compared with only 17% who wanted to talk to alumni.

Amid global instability, students are seeking to get a better feel for what student life is truly like. Given the practical barriers to in-person contact, exacerbated by the pandemic, this shows that virtual resources and tools that allow for interactions between current and prospective students, are increasingly important.

“ **PLANNING TO TAKE PART IN VIRTUAL EVENTS RUN BY ORGANISATIONS LIKE UCAS... TO GET TO KNOW MORE ABOUT THE STEPS OF THE APPLICATION PROCESS**

“ **STUDENT REVIEWS MADE IT EASIER FOR ME TO DECIDE**

While it is important for universities and colleges to leverage these increasingly popular mediums for students to obtain information about university or college life, it does not replace tried and tested mechanisms like websites, emails, and social media posts. Based on prior College Board surveys, 76% of international students indicate that they have obtained information about universities and colleges through their website and 45% indicated that they received information through the universities' and colleges' social media posts²³.

²³ College Board survey of international students, August 2021, November 2020, November 2019

WHAT ROLE DO QUALIFICATIONS PLAY?

Qualifications are the currency for progression – for those applying to the UK alone, students apply with more than 1,000 different qualifications designed to develop the skills they will require for HE level study. When we segment to international students, we see a range of over 700 types of credentials from all over the world. Globally, and as is the case in the UK for those applying through UCAS, it is common practice for students to be required to declare all their qualifications as part of the admissions process. Thereafter, organisations such as **ECCTIS** and UCAS, through their **qualification information profiles**, provide information to support admissions teams globally in understanding international qualifications.

UCAS research has demonstrated the importance of forethought when choosing qualifications – more than a quarter of UK school pupils would make different GCSE / National 5 choices now that they know what their degree course involves – and around a third would choose a different post-16 option. Most prospective international students are already thinking ahead – with seven in ten respondents saying that when making their qualification choices, they considered how this might affect their ability to study abroad. This trend is even more pronounced for those applicants from China (85%) and Nigeria (81%).

“ I SPECIFICALLY TOOK A-LEVELS BECAUSE IT WAS AN ENTRY REQUIREMENT TO STUDY IN THE UK, AND ALSO, I KNOW IT WOULD ALSO STRENGTHEN MY APPLICATION WHEN APPLYING TO OTHER COUNTRIES.

“ THE ABITUR IS THE ‘STANDARD’ SCHOOL-LEAVING CERTIFICATE THAT ALLOWS YOU TO GAIN ADMISSION TO UNIVERSITIES WORLDWIDE

In addition, when asked about the use of their qualifications for progression, individuals most cited recognition by their chosen HE destination (64%), ahead of the reputation of the qualifications themselves (61%). This demonstrates that for this cohort, accessing an international HE education is a high priority during their secondary or high school education. This is further evidenced when we learn that the biggest influence on school qualification choice is knowing that it would ‘lead me to the HE options that interest me’ (72%).

The College Board’s own research also reinforces this notion that students want to engage with qualifications that will help them gain admissions to their target HE university or college. Even though many US universities and colleges adopted test optional policies during the pandemic, 80% of international students say they are likely to sit for the SAT to help increase their chances of getting into their university or college of choice and 83% of students indicated that they want the option to submit their scores to universities and colleges for consideration²⁴.

In March 2023, the College Board will be launching the digital SAT at all locations outside of the US. When surveyed, 91% of international students expressed positivity towards the upcoming transition²⁵. For international students, these changes will make the experience of taking the SAT easier using a digital delivery mechanism that this generation of students are more comfortable with, thereby easing the stress of earning this globally applicable qualification.

²⁴ College Board survey of international students, August 2021

²⁵ College Board student tracking survey, April 2022

SECTION FOUR

WHAT CAN WE LEARN FROM FROM THIS COHORT TO PROMOTE DIVERSITY IN OUR CLASSROOMS ACROSS THE WORLD?

HIGHLIGHTS

CHINA IS SET TO REMAIN THE THIRD BIGGEST MARKET FOR UK HE

2026 will see applicant numbers exceed 50,000

KNOWLEDGE AND SKILLS ARE TOP PRIORITIES

When asked about their aspirations in pursuing a degree outside of their home country, students consistently rank those factors related to knowledge and skills most highly

THE MAJORITY FEEL READY TO EMBARK ON THEIR OVERSEAS STUDIES

78% of respondents say they are 'extremely' or 'mostly' ready



Annual demand from international students could reach more than 200,000 by 2026

Despite concerns that COVID would dampen demand for overseas study, **UCAS** and others, including the **Institute of International Education (IIE)** have reported that the universal appeal of HE across borders has held firm. It appears that students are losing patience with COVID's disruptive effect on their future, reflective of the **prediction** from market intelligence firm, HolonIQ, that 9 million internationally mobile students is a 'plausible' possibility by 2030.

UCAS projects the 2026 cycle could see one million applicants – around 27% more than in 2021, and double those seen in 2006. About 55% of this increase will be attributable to a growth in demand from UK 18-year-olds (driven by both an increase in application rates and an increase in the population) with the remaining 45% driven by continued growth in UK mature (c.10%) and international (c.35%) demand.

More specifically, and aligned to recent **modelling** led by the Chinese digital marketing company, Sinorbis, China is set to remain the largest non-UK market for UK HE (since 2020 China now has more applicants than two UK countries, namely, Wales and Northern Ireland) – 2026 will see applicant numbers exceed 50,000. This will see the UK remain heavily dependent on Chinese applicants, which as UCAS has previously **commented**, heightens the need for diversification to maintain the sustainability of the UK's international recruitment market.

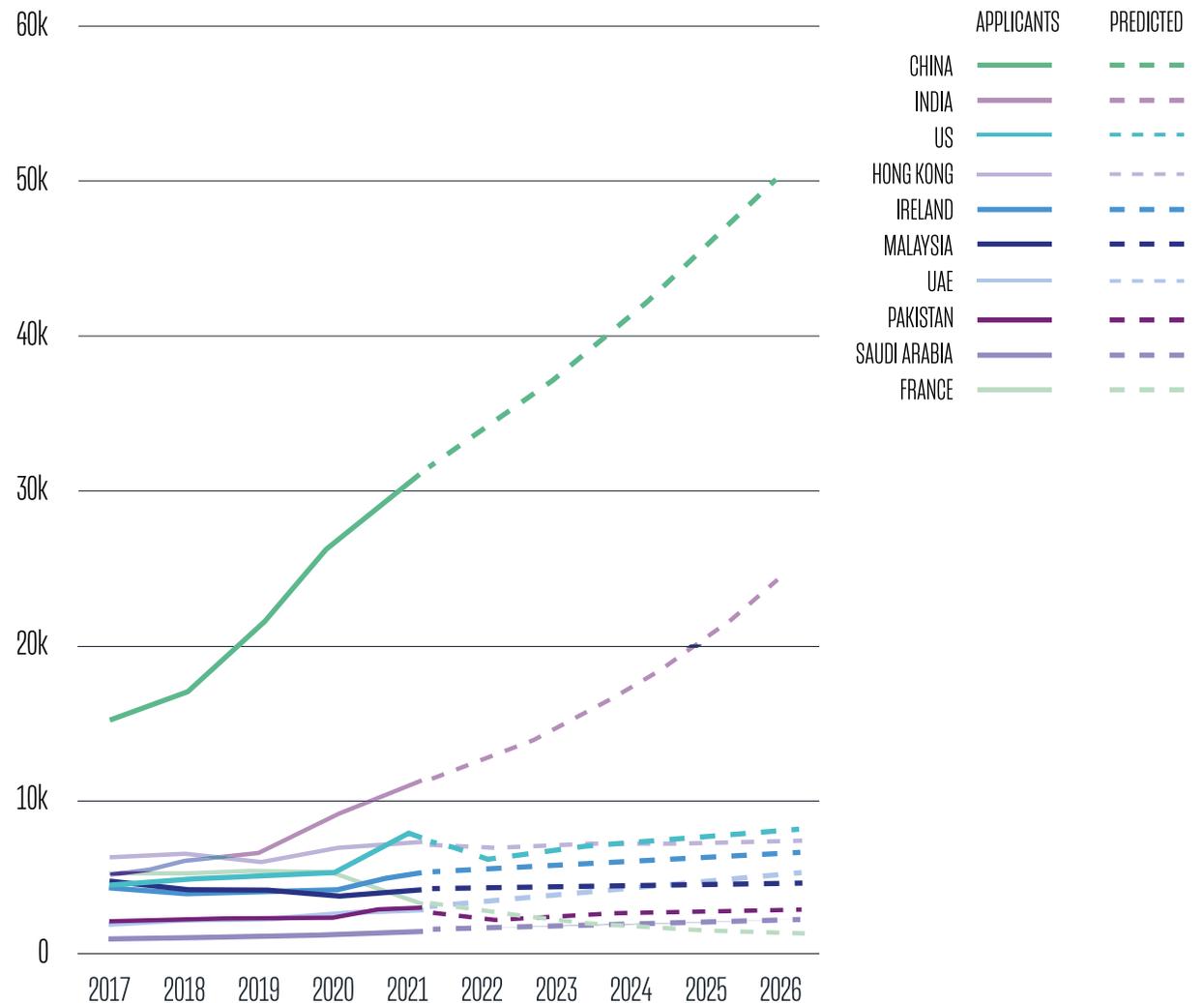


Figure 7: Forecasted UCAS applicants up to 2026 for selected international domiciles



Elsewhere, the trajectory for Indian applicants (an **International Education Strategy (IES)** priority country) continues, with demand in five years' time set to reach around 25,000 – approximately half the volume coming from China. The picture is less clear for Hong Kong, currently the fourth biggest market, where demand is set to plateau at around 7,500. Of additional note among the IES priority countries is Saudi Arabia, with demand set to climb steadily to reach 2,500, and of those markets referenced within the **International Strategy** for Wales, appetite from Irish students for UK HE is set to continue to grow, reaching nearly 7,000.

This rising demand from international markets presents significant opportunities to grow and diversify classrooms in UK universities and colleges. Nevertheless, growing competition from other destination countries, namely the US (20% market share), China (9%), Canada (9%), and Australia (8%), as well as emerging destinations such as the United Arab Emirates²⁶, means that understanding what students are looking to gain through a degree overseas is ever more important.

After weathering several years of a political climate that was unwelcoming to international students, the US under the Biden administration has reasserted its commitment to international students through **a joint statement** from the US Departments of State, Education and Commerce. Being one of the first countries to welcome back international students through the pandemic, this positivity is once again boosting the attractiveness of the US as a destination for international students. As of March 15 2022, the **Common Application** reported that the number of international applicants to US institutions has grown 34% since 2020, far exceeding the 12% growth among US applicants. The College Board's survey of prospective international students also showed that 93% of international students are interested in studying outside their home country with the US, UK and Canada topping the list as the top three destinations of choice²⁷.

This compares with 82% of students expressing interest in studying outside their home country right before the pandemic.

It is also important to note that international students are increasingly diversifying their options to consider home and overseas options in parallel. In a survey of international schools, 61% of international schools report that their students are interested in studying in their home country or their home country and the US. This has increased from 44% in 2019 immediately prior to the pandemic²⁸. As such, in addition to understanding competition from other destinations, universities and colleges need to also consider competitors in home countries, particularly large sending countries such as India and China that are also investing heavily in their own higher education systems. This further underlines the need to diversify and reduce dependence on any specific markets.

²⁶ <https://www.iie.org/Research-and-Insights/Project-Atlas/Explore-Global-Data>

²⁷ College Board survey of international students, August 2021, November 2019

²⁸ College Board survey of schools outside the US, August 2021, November 2019

WHAT ARE STUDENTS TRYING TO GET OUT OF THEIR OVERSEAS DEGREE?

Emerging out of the pandemic, knowledge and skills are top priorities

1	GAIN KNOWLEDGE AND COMPETENCIES IN A SPECIFIC SUBJECT AREA
2	EXPAND MY OVERALL KNOWLEDGE AND TRANSFERABLE SKILLS
3	HOLD THE KNOWLEDGE AND SKILLS NEEDED TO ENTER MY DESIRED FIELD OF WORK / CAREER PATH
4	HOLD A DEGREE FROM MY HIGHER EDUCATION INSTITUTION OF CHOICE
5	LAND A JOB IN MY COUNTRY OF STUDY
6	TAKE PART IN SOCIAL EXPERIENCES THAT WILL ENRICH MY LIFE
7	EMIGRATE TO MY COUNTRY OF STUDY
8	LAND A JOB IN MY HOME COUNTRY

When asked about their aspirations in pursuing a degree outside of their home country, students consistently rank those factors related to knowledge and skills most highly. Around a quarter (26%) rank 'expand my overall knowledge and transferable skills' first with a further quarter (26%) citing 'gain knowledge and competencies in a specific subject area' and a fifth (21%) choosing 'hold the knowledge and skills needed to enter my desired field of work / career path.' This aligns with findings from **INTO University Partnerships** which

suggest a shift away from a focus on the prestige of individual universities or colleges, towards the pursuit of concrete outcomes from overseas HE – a learning experience that helps them develop critical knowledge and skills. UKCISA is also **calling** for a renewed focus on developing the evidence base around international graduate outcomes.

Students are considering their future 'home'

Students are five times more likely to rank landing a job in their destination country, relative to their country of domicile, as their top priority (5.5% vs. 1.2%). Similarly, when asked whether they intend to remain in their country of study post-graduation, visa permitting, individuals are four times more likely to be planning on staying in their country of study than not (41% vs. 10%).

From the perspective of brand UK HE, this is a promising finding given the recent introduction of the **Graduate route**, which provides an opportunity for international students who have been awarded their degree to stay in the UK and work, or look for work, at any skill level for two years. It suggests that this policy is playing its part in growing the attractiveness of the UK as a destination for international students.

The recent introduction of a new **High Potential Individual (HPI) route**, designed 'to make it as simple as possible for internationally mobile individuals who demonstrate high potential to come to the UK,' offers an additional incentive for individuals to seek an internationally recognised degree qualification. Building on the recent report published by Universities UK International, **International Student Recruitment: Why aren't we second?**, which highlighted the importance of the Graduate route in improving the UK's competitiveness, ensuring the success of both routes will be important, not just to the HE sector, but the wider economy as a whole.



Equally, College Board's survey data shows post-graduation prospects as among the top three factors for prospective international students targeting the US for study, with 73% of students rating this a very important factor when selecting universities and colleges to apply to²⁹. This is in the context of changes to the US' **Optional Practical Training (OPT) programme** which allows international students to temporarily stay in the US post completion of their degree programme to pursue employment. In early 2022, the Biden administration announced expanded eligibility for the OPT programme, allowing international students in more STEM-related fields of study to remain in the country for up to three years after graduation. Graduates from STEM programmes will also be prioritised for receiving Green Cards, effectively providing a path to citizenship for international students pursuing degrees in STEM fields that the US has deemed critical to its future competitiveness in the global arena. Given the already high numbers of international students interested in pursuing degrees in STEM, this policy is expected to further boost the attractiveness of the US as an international study destination and retain STEM talent in the US.

“ I WANT TO STUDY, THEN LIVE AND WORK IN THE US AFTER GRADUATING

“ WANT TO LIVE IN ANOTHER COUNTRY FOR MY WORKING CAREER, SO GOING TO SCHOOL THERE AS WELL MAKES THE MOST SENSE

HOW READY DO STUDENTS FEEL?

The majority feel ready to embark on their overseas studies – 78% of respondents saying they are 'extremely' or 'mostly' ready, demonstrating the level of preparedness required to plan for education in another country. Nonetheless, a minority (4%) felt 'not very' ready, highlighting the importance of further support in transition not least against the backdrop of the pandemic.

Further questioning reveals that only 15% of prospective international students are receiving all the support they need, with individuals particularly keen to understand more about their funding options (54%) and student visas and immigration (51%). There are aspects of student support that vary from region to region, with students from China and Hong Kong having a stronger requirement for more detailed instructions on the application process (63% and 58% of students from these regions respectively), and students from Nigeria feeling that additional communications from their chosen universities or colleges about their processes and experiences would benefit them (54%).

“ MORE PERSONALISED INFORMATION, E.G. I DID NOT KNOW THAT “QUALIFICATION” MEANT “DEGREE” FOR A WHILE

“ MORE INFORMATION ON FUNDING FOR INTERNATIONAL STUDENTS AND MORE DETAILED INSTRUCTIONS ABOUT VISA PROCESSES

²⁹ College Board survey of international students 2021

ANNEX A: TECHNICAL NOTES

The data used throughout the majority of Section 1 of this report is taken from UCAS undergraduate application data. Domicile data is collected in the undergraduate application by way of a drop-down list consisting of reference data held by UCAS, which is updated annually. For time series reporting purposes, each country name and EU membership status is taken from the most recent year's reference data, and applied to all years. The Channel Islands and the Isle of Man have been assigned as outside of the UK. Unless otherwise specified, the analysis in this report is performed on the end of cycle snapshot from the 2021 application cycle. Country-specific analysis has been performed on the ten highest countries for applicants in 2021, and the International Education Strategy priority countries.

The remainder of this report relies on responses from a new survey conducted by UCAS and the College Board between December 2021 and January 2022, which was sent to both UCAS undergraduate applicants domiciled outside of the UK, and College Board registrants domiciled outside of the US. Of the 1,270 respondents to the survey, 1,110 were UCAS applicants. Domicile-specific analysis has been performed on the six highest countries for respondent domicile. Destination-specific analysis has been performed on the six highest countries for destination interest expressed in the survey.



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