

UCAS

WHERE NEXT?

THE EXPERIENCE
OF INTERNATIONAL
STUDENTS CONNECTING
TO UK HIGHER EDUCATION



EXECUTIVE SUMMARY

UCAS is the single largest channel for international students entering UK study. Bringing together UCAS data and findings from UCAS surveys, this report explores the experience of international students in connecting to UK higher education (HE).

UCAS' undergraduate application data provides an overview of how the number of international students applying to UK universities – especially from countries outside of the EU – has continued to grow in recent years.

Surveys conducted in 2020 and 2021 provide further insights on the drivers and influences that motivate international students to apply to UK universities, and the challenges they may face during their application and decision-making journey. Of note:

- ▶ Top factors motivating students to study in the UK include the prestige of UK universities (47%), the desire to live in the UK (45%), teaching quality (43% overall – with 36% of undergraduates and 49% of postgraduates indicating this as priority).
- ▶ Applicants would like more information on matters such as accommodation, funding, employment opportunities and completing the student visa application. At least 30% of applicants across all routes found choosing accommodation and seeking funding advice to be challenging.

- ▶ Our survey conducted in 2021 focuses on the experiences of recent applicants applying to UK HE during the COVID-19 pandemic.
- ▶ 88% of international applicants continue to see the UK as a positive or very positive place to study.
- ▶ While 44% of applicants surveyed felt completely ready for the start of the current academic year, 50% felt either somewhat ready or not ready at all.
- ▶ 72% of international applicants wanted more information about what their year would look like and how the COVID-19 pandemic would impact it, even if they had received some communications from their chosen provider to date. This sentiment is similar among domestic applicants, with 71% of UK-based pre-applicants for the 2022 cycle wanting more information and guidance.



NEXT STEPS

As part of our work to connect the world to UK HE, UCAS is undertaking the following activities in support of the government and education sector's efforts aimed at ensuring the UK remains a top destination for international students:

- ▶ 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 14 languages.
- ▶ As part of the International Education Strategy, UCAS will continue to work with government and sector partners to deliver on the commitment to provide clear and personalised information to international applicants.
- ▶ UCAS will be publishing further insights on our role in connecting the world to UK HE. We will also continue to improve the ways in which international applicants are supported throughout our products and services.

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 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 HE¹.

International student recruitment has transformed since the millennium. In 2000, there were approximately 2 million² mobile students³ across the globe. In 2020, this was estimated to have increased to 5.6 million. While the UK's market share declined from 14% to 10% during this period⁴, the number of students outside of the UK applying via UCAS has nearly tripled.

Much has been made of the impact of the current pandemic on international student recruitment, with COVID-19 making cross-border travel more challenging, and surveys regularly reporting that the volume of international students would drop dramatically in 2020. Despite these challenges, the number of placed students from outside of the EU increased by almost 17% in 2020, and by 2% in 2021.

This report looks at the current experience and sentiment of international students as they progress to UK HE, and how this has been impacted by the pandemic. Furthermore, it looks at how this can be enhanced, including through the availability of Myriad by UCAS, our new international postgraduate platform.

¹ Approximately 95% of undergraduate entrants from the EU, and 60% of entrants from outside the EU, apply through UCAS.

² UNESCO Institute for Statistics. National monitoring: outbound internationally mobile students by host region. **UIS Statistics (unesco.org)**

³ An internationally mobile student is classified by the UNESCO Institute for Statistics as a student "who has crossed a national or territorial border for the purpose of education and are now enrolled outside their country of origin."

⁴ Project Atlas, 2020 release. A quick look at global mobility trends. **Project-Atlas-Infographics-2020.pdf (widen.net)**

UCAS AND INTERNATIONAL STUDENT RECRUITMENT

During the 2021 application cycle, **142,925 students domiciled⁵ outside of the UK had applied to study at a UK HE provider through UCAS in 2021, of which 70,005 were placed by the end of the cycle⁶.**

Undergraduate applicants from outside of the European Union (EU) continue to rise and are up this year by over 12% to a record 111,255, with 54,030 placed – an increase of 2% over the previous year. This shows the value that international applicants and their families continue to place on studying at the UK's institutions even with the current challenges they face due to the COVID-19 pandemic.

China is by far the largest market for UK international student recruitment, with 30,845 applicants and 16,310 placed applicants during the 2021 application cycle. China is now the third largest market for UK HE overall, providing more applicants than Wales and Northern Ireland, and almost as many applicants – and more placed applicants – as the whole of the EU.

Beyond China, India is the second largest market with 11,075 applicants and 4,600 placed. The United States of America (USA) has seen the largest proportional increase in applicants of any major nation to 7,980: an increase of over 48% to 7,980. The number

of placed applicants from the USA increased by 32% to 2,710.

Undergraduate applications and placed students from the EU have been impacted by a range of factors, including the uncertainty associated with the UK's withdrawal from the EU, and changes to student support arrangements. Overall, EU applicants were down to 31,670, falling by 40% since last year. EU placed applicants were down to 16,025, falling by 50% since last year. However, Ireland and Portugal break the mould of EU countries. 5,425 Irish applicants applied to UK higher education in 2021, up by almost 23% on last year. Irish acceptances were up 15% from last year to 2,385. 3,235 Portuguese applicants applied to UK higher education in 2021, up by 23% on last year. Portuguese applicants placed by the end of the cycle were up over 42% from last year to 2,730.

⁵ The use of the term 'domicile' in this report refers to a declared area of permanent residence.

⁶ UCAS undergraduate sector-level end of cycle data resources 2021. [UCAS Undergraduate sector-level end of cycle data resources 2021 | Undergraduate | UCAS](#)

Figure 1 provides an overview of the top 10 largest markets for UK international student recruitment over the past five years, based on the number of applicants at the end of the admissions cycle. While China has maintained its top position, this chart demonstrates the variation among other EU and non-EU markets.

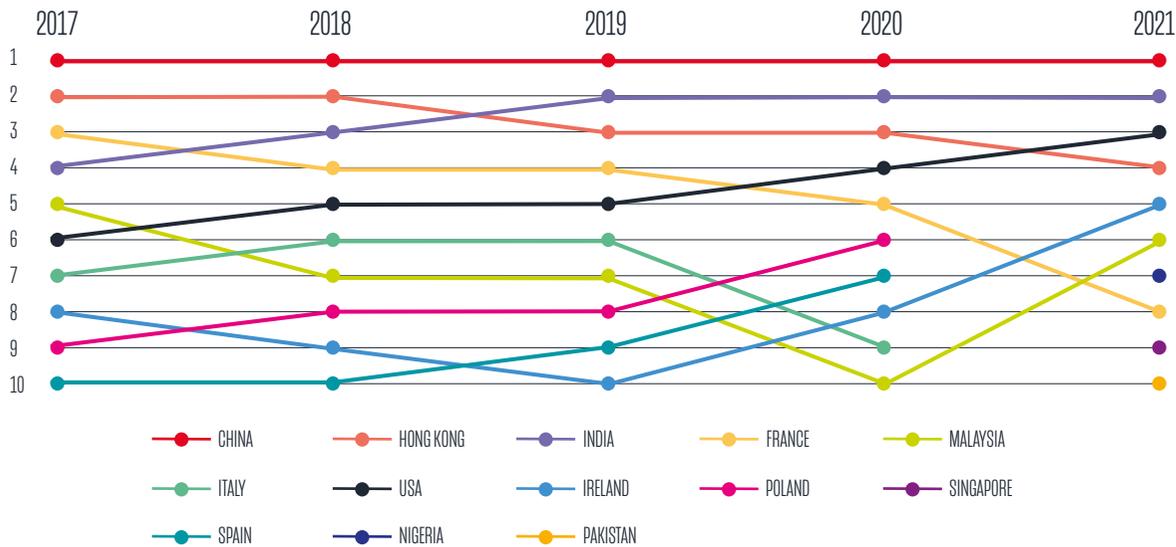


Figure 1: Largest markets for UK international student recruitment based on number of undergraduate applicants at end of cycle [Source: UCAS]

Over 51% of placed undergraduate international applicants that commenced undergraduate studies in the UK in 2021 came from seven countries. Approximately two in every nine placed applicants that entered UK HE in 2021 are from China. This highlights a potential risk to the sustainability of the UK's international student recruitment should these high-volume markets be disrupted.

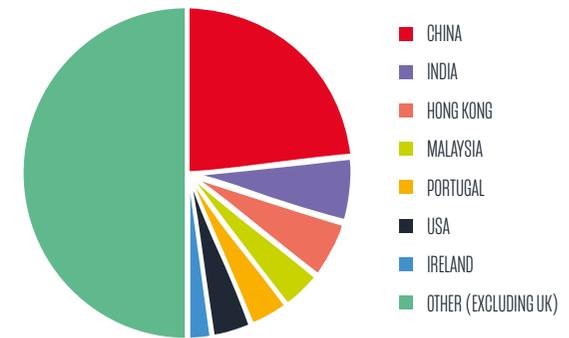


Figure 2: Placed international undergraduate applicants by domicile, 2021 [Source: UCAS]

The latest UCAS data, following the October application deadline for 2022 entry to all undergraduate courses at the universities of Oxford and Cambridge, as well as medicine, dentistry, and veterinary medicine/science courses across the UK, also provides a view of how trends may continue to evolve during the next cycle. At this stage of the 2022 cycle, the number of international applicants to UK higher education has decreased by 4% compared with the same period last year. Demand for a UK degree among non-EU countries remains strong – for example, applicants from China have risen by 5% since last year, meaning more than a quarter of non-EU applicants have come from one country. The number of EU applicants for the 2022 cycle to date mirrors last year's patterns of fewer EU applicants throughout the cycle.

THE INTERNATIONAL APPLICANT JOURNEY

In 2020, UCAS undertook research on the requirements and expectations of students, agents and UK HE providers related to international student recruitment. As part of this research, a survey⁷ was sent out to over 330 international undergraduate and postgraduate students from eight key countries and regions⁸ currently studying in the UK.

UCAS also surveyed over 500 international applicants applying for autumn 2021 or 2022 undergraduate entry⁹, on their experiences applying to UK HE during the COVID-19 pandemic.

This research is helping shape the work we are advancing to support the UK's ambitions in this area and helps inform the analysis presented throughout this report.

WHAT ATTRACTS INTERNATIONAL STUDENTS TO STUDY IN THE UK?

Top factors motivating students to study in the UK include the prestige of UK universities (47%), the desire to live in the UK (45%), teaching quality (43% overall – with 36% of undergraduates and 49% of postgraduates indicating this as priority). Of note, course length is a top motivating factor for 43% of postgraduate students, compared to 17% of undergraduate students. Many full-time postgraduate courses can be completed in one year in UK – similar courses may take longer to complete elsewhere.

⁷ Red Brick – UCAS Student Survey Report, September 2020

⁸ China, France, Germany, India, Italy, Malaysia, USA and Hong Kong

⁹ YouthSight/UCAS – Survey on the view of international applicants, June 2021.

As a destination, the UK fulfils a set hierarchy of needs related to learning, living and employability.

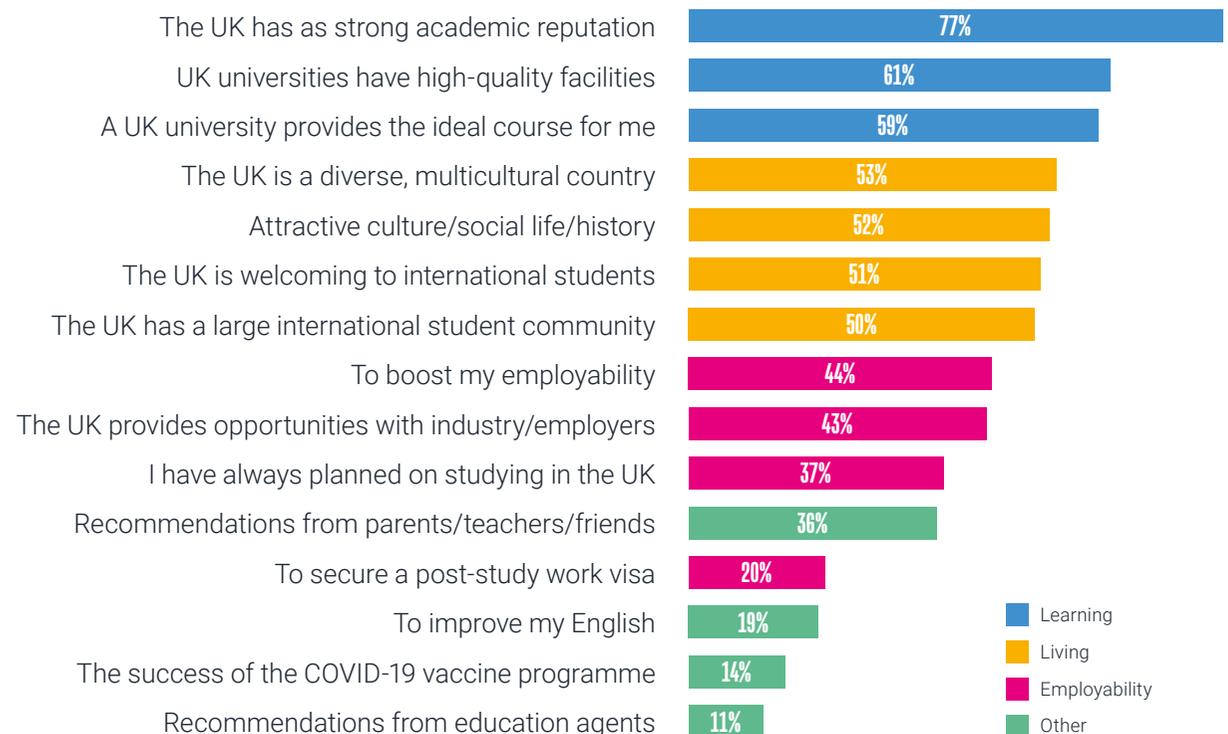


Figure 3: Reasons to apply – percentage selecting each factor [Source: YouthSight]

WHAT MIGHT DETER INTERNATIONAL STUDENTS FROM STUDYING IN THE UK?

While the UK is clearly an attractive prospect for international applicants, choosing the UK for further and higher education is not a foregone conclusion.

Among applicants surveyed ahead of the current academic year, the United States of America, Canada, the Netherlands, the Republic of Ireland and Australia were also top destinations of interest. There are also signs that younger age groups, and applicants from Europe, are feeling less positive about the UK. 11% of applicants aged 17 and 18 think the UK is a worse option compared to the other destination countries they are considering. While the UK is seen as a better option for 77% of applicants from Africa and 73% of the Americas, only 52% of applicants from Central and Eastern Europe, and 53% of applicants from Western Europe, share the same sentiments.

When asked about specific barriers that would put them off from studying in the UK, 69% of applicants surveyed identified high tuition fees and living costs as a top concern. This is felt particularly strongly in Central and Eastern Europe and Western Europe, with 80% and 72% of applicants respectively identifying this as a primary barrier.

HOW DO INTERNATIONAL STUDENTS APPLY TO STUDY IN THE UK?

Students surveyed had applied to study in the UK through three routes: UCAS, an education agent or professional adviser, or directly to a HE provider. UCAS was heavily favoured by undergraduates, while postgraduates favoured direct application.

The new Myriad by UCAS platform for international postgraduate applicants supports applications both within the platform and directly to providers, as part of its aim to provide applicants with a more streamlined experience, and for their respective agents, increased efficiency.

When you applied to university in the UK to do the course you were studying in 2019/20, through which of the following application routes did you apply?

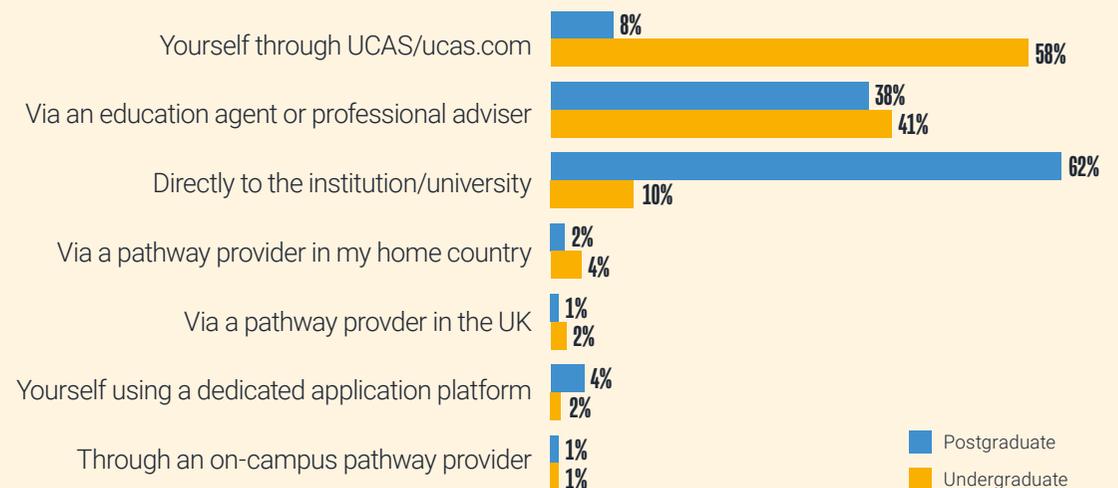


Figure 4: Application routes [Source: Red Brick]

UCAS provides the highest overall positive experience relative to other application routes, according to students surveyed. Undergraduates are particularly happy with the service they received from UCAS, and the ease of the application process. Students who choose to apply directly to HE providers – mainly postgraduates – are most likely to do so as it was the only way they knew how to apply. Students using agents are likely to do so in order to apply to multiple universities in the UK and in other countries.

HOW DO INTERNATIONAL STUDENTS FIND THEIR APPLICATION AND DECISION-MAKING JOURNEY?

During the application and decision-making process, students struggle most with choosing a university, deciding on accommodation, and obtaining advice on funding, scholarships, and bursaries across all application routes.

Completing the Student visa application is particularly challenging for students who applied directly to a HE provider, although students across all application routes would have liked more information on the process and the items that need to be provided as part of the application.

Students are also keen to better understand their eligibility for funding opportunities, obtain support in relation to employment during and after their studies and obtain detail on the practical and experiential elements of their accommodation.

Among students surveyed who would have liked more help/support with choosing a university, obtaining more information on work placement opportunities, graduate employment prospects and part-time employment opportunities during their studies were identified as top areas of interest. Postgraduate students are particularly interested in obtaining greater support in assessing opportunities for work placements and graduate employment prospects, while undergraduate students are more interested in information on institutional reputation and rankings.

WHAT INFLUENCES INTERNATIONAL STUDENTS' DECISION-MAKING?

In deciding where to study, international students place greatest emphasis on the reputation of a university and its courses, and course content/structure. In making their decisions, undergraduate and postgraduate students prioritise different factors.

FACTORS THAT ARE MORE IMPORTANT FOR UNDERGRADUATE STUDENTS	FACTORS THAT ARE MORE IMPORTANT FOR POSTGRADUATE STUDENTS
Entry requirements	Tuition fees
Campus facilities, local area, and social scene	Research environment and opportunities
Recommendations (e.g., from parents, teachers)	Scholarships and bursaries

[Source: Red Brick]

Parents and guardians exercise the most influence over students when they are making decisions related to their studies and accommodation. Among students surveyed, 71% responded that their parents and guardians had some or a significant impact on their decision-making process. This impact does appear to be based on the level of study, as 77% of undergraduate students claimed some or significant parental and guardian influence, compared to 66% of postgraduate students. Schools and colleges also play a role in influencing student choice regarding course and university. The influence of parents and guardians appears to have a greater direct impact on decision-making for international students, compared to UK-based students. As explored in UCAS' 2021 'Where next? What influences the choices school leavers make?' report¹⁰, one in four UK-based students cite parents or carers as their 'biggest help' when determining their choice of degree course, though the influence of parents and carers may be greater than students realise.

¹⁰ UCAS – 'Where next? What influences the choices school leavers make?', download (ucas.com)

THE IMPACT OF THE COVID-19 PANDEMIC ON INTERNATIONAL APPLICANTS

THE UK REMAINS AN ATTRACTIVE DESTINATION FOR INTERNATIONAL STUDY, BUT APPLICANTS COULD HAVE FELT MORE READY FOR THE CURRENT YEAR

Based on applicant sentiment ahead of the current academic year, the UK remains in a strong position to attract international applicants due to the prestige of its universities. 88% of international applicants continue to see the UK as a positive or very positive place to study. 63% of applicants also believe the UK is a better option compared to other countries they considered applying to.

The COVID-19 pandemic also provides real, ongoing challenges – general uncertainty (32%) and changes to the way courses are delivered (27%) continue to be salient issues in the minds of international applicants.

As part of the survey of international applicants conducted by UCAS earlier this year, applicants were asked how ready they felt to study abroad ahead of the current academic year. While 44% of respondents felt completely ready, 50% felt either somewhat ready or not ready at all.

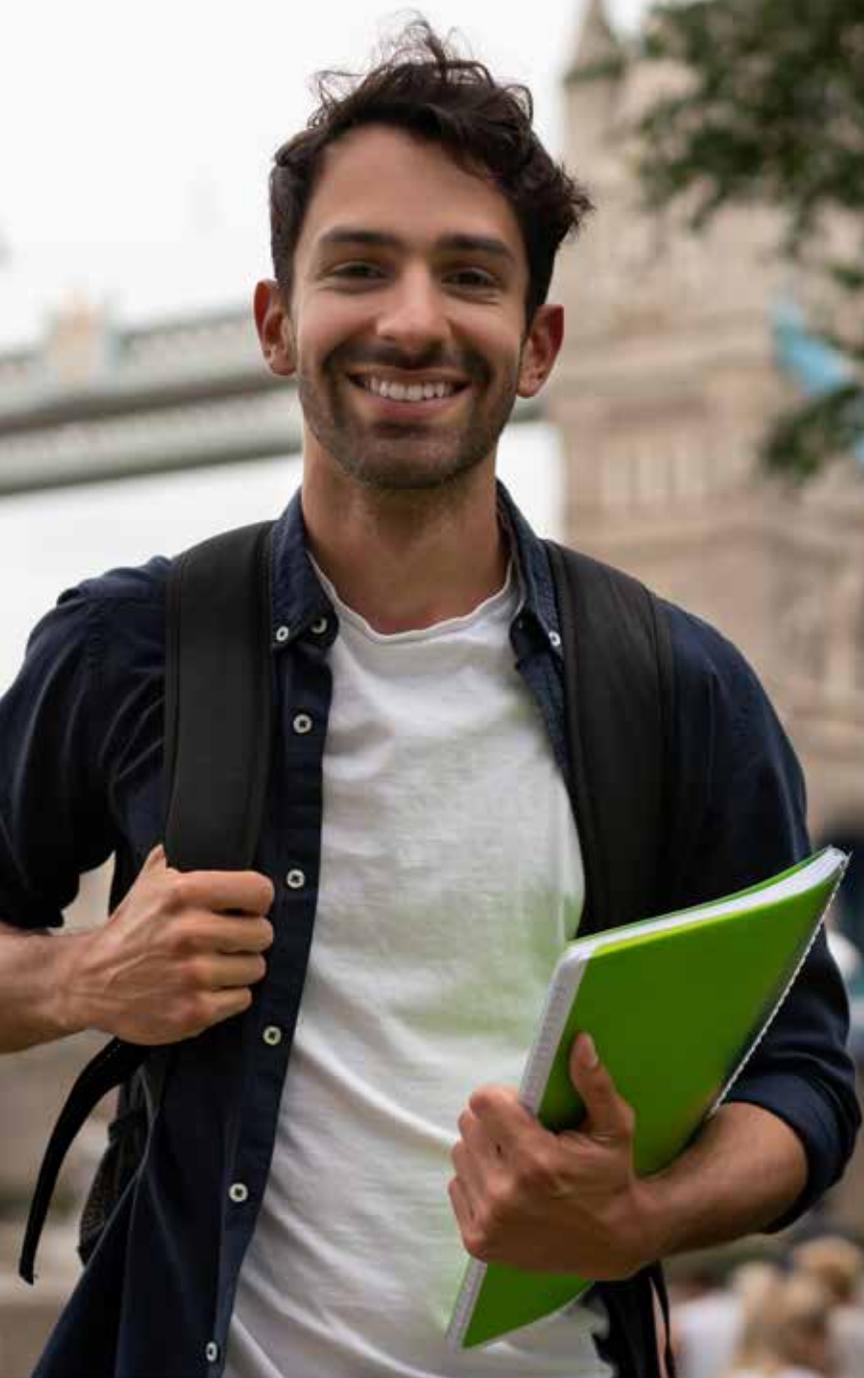


Figure 5: International applicant readiness for the 2021-22 academic year [Source: YouthSight]

Applicants who felt completely ready were excited for the opportunities associated with study in the UK, had pre-existing experience living abroad, and felt they received good support to date through communications with their university, open days, and from friends and family.

Applicants who felt somewhat ready or not ready at all were hesitant to leave friends and family, apprehensive about the financial impacts of study in the UK, mindful of the ongoing impacts of the pandemic on student life and continuing to await confirmations from some providers before making their final decisions on their study destination.

The uncertainty some applicants have identified in relation to “waiting for universities to offer places” is an interesting point as it links to post-qualification admissions reform currently being considered in the UK. While the UK government’s recent consultation on the topic stated that international students were currently ‘out of scope’, the admissions system needs to work for all students – UK and international alike – who have the potential to benefit from UK HE. Students are keen to have certainty around the application process, and this certainty – alongside timely offer making early in the calendar year, when international students are preparing to make their final decisions – will help strengthen the UK’s competitive position in international education¹¹.



APPLICANTS WANT TO BE INFORMED ON COURSE DELIVERY, CAMPUS LIFE AND EMPLOYABILITY

72% of this year's applicants wanted more information about what their year would look like and how the COVID-19 pandemic would impact it, even if they had received some communications from their chosen provider to date:

- ▶ Applicants were particularly keen to obtain information on course delivery (80%) and COVID-19 measures on campus (67%).
- ▶ Virtual resources and tools, such as virtual open days or platforms that allow for interactions between current and prospective students, are increasingly important, particularly for students seeking to get a better feel for what student life is like in the current context and have direct contact with current students.

The desire for additional information is similar among both domestic and international applicants, with 71% of UK-based pre-applicants for the 2022 cycle also wanting more information and guidance¹².

Undergraduate applicants surveyed ahead of the current academic year also expressed a desire of wanting to study and work in the UK. Future employability in the applicant's country of study (54%) was identified as a more important factor than future employability in the applicant's home country (37%) in making decisions about study destinations.

We recognise the efforts currently being led by the UK Council on International Student Affairs (UKCISA), Universities UK International, the Confederation of British Industry (CBI) and other education and employer groups to support international student and graduate employability, as part of the International Education Strategy. We also recognise the role the recently launched Graduate route will play in providing international graduates with the opportunity to work in the UK after their studies.

¹⁰ UCAS – 'Where next? What influences the choices school leavers make?', download (ucas.com)

CURRENT OPPORTUNITIES AND NEXT STEPS

In working to achieve the aims of the UK's International Education Strategy – notably, to increase the number of international students hosted in the UK to at least 600,000 per year by 2030, to diversify the countries and regions from which these students originate and to enhance the international student experience – there is a timely opportunity to address the pressure points international students face during their application and study journeys, particularly as the pandemic continues to present challenges. We welcome Universities UK International's **recent report on international student recruitment**, which sets out recommendations aimed at ensuring the UK remains a competitive and attractive study destination. UCAS is keen to support the actions proposed by the report aimed at enhancing the promotion of UK HE and its benefits. UCAS also acknowledges the efforts of the British Council in providing increased information to international students about the impacts of the pandemic through its Study UK website.

As the number of international postgraduate taught students choosing to study in the UK increases, there are active efforts underway to help them navigate the fragmented and complex landscape they face during the application process. Myriad by UCAS, which went live in late 2021, provides a single postgraduate platform under the independent UCAS brand, available in 14 languages. By downloading the app, or using a browser-based version, Myriad allows international students to search for higher education providers, postgraduate taught (PGT) courses, accommodation, part-time jobs,

and get matched to scholarships, all in one place. For universities and colleges, Myriad aims to increase diversity in applicants, with the platform already attracting users from over 130 countries, and its collaborative and information tools will complement existing processes for agents, increasing efficiency.

We continue to engage with students, agents, providers, and other HE stakeholders and partners leading up to Myriad's formal launch to ensure the platform will continue to meet the needs of all groups it serves.

We will publish further insights on our role in connecting the world to UK HE. Building on previous work such as our 2019 report on international applicants and priority markets¹³, we will further demonstrate how international students from countries and regions across the globe are choosing to study in the UK, and what can be done to further support them through their application and study journeys.

We will also continue to work with the UK government and education sector partners to deliver on the commitment to provide clear and personalised information to international applicants, as part of the International Education Strategy.



¹³ UCAS – 2019 international insights report. [download \(ucas.com\)](https://ucas.com)

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