


# Breakout Session 2

**Inside our Insights – How UCAS data and reporting can support you**

- Carys Willgoss, Principal Policy Adviser, UCAS
- Hayley Thornley, Market Insight and Analysis Lead, UCAS



# Inside our Insights: How UCAS data and reporting can support you

Carys Willgoss, Principal Policy Adviser

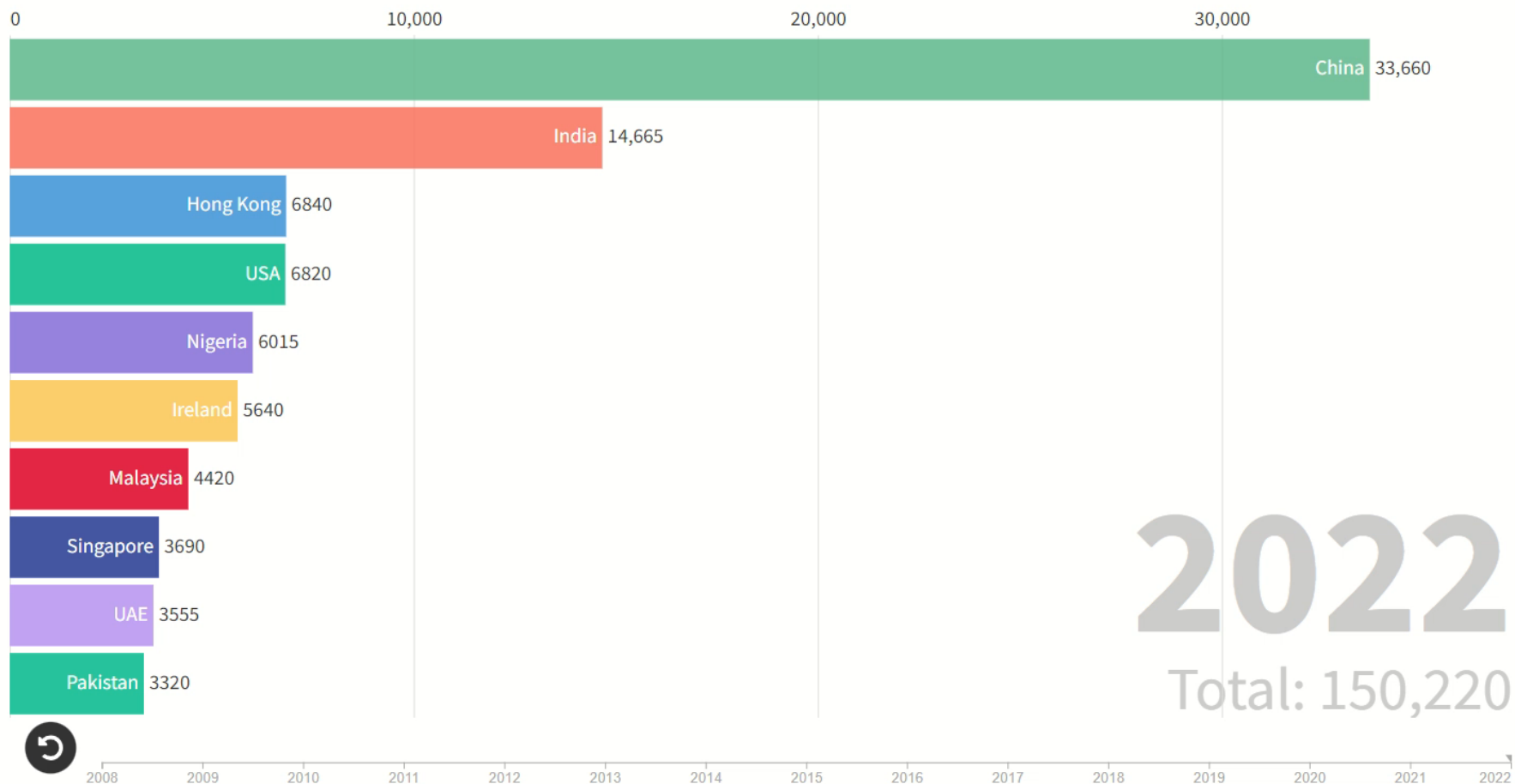
Hayley Thornley, Market Analysis and Insight Lead

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# Summary

- International student decision-making: What, how and why?
- The current international applicant mindset
- The 'Journey to a Million' – risks and opportunities for international student recruitment
- Upcoming UCAS research – spotlight on China





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## WHERE NEXT?

WHAT INFLUENCES THE CHOICES INTERNATIONAL STUDENTS MAKE?

CollegeBoard



### NEXT STEPS

WHO ARE THE 'FUTURE NURSES'?



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### NEXT STEPS:

WHAT IS THE EXPERIENCE OF STUDENTS FROM A CARE BACKGROUND IN EDUCATION?

In collaboration with



UCAS

### NEXT STEPS

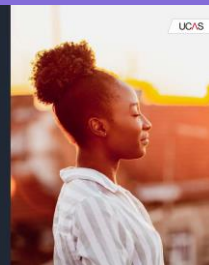
WHAT IS THE EXPERIENCE OF DISABLED STUDENTS IN EDUCATION?

In collaboration with



### STARTING THE CONVERSATION

UCAS REPORT ON STUDENT MENTAL HEALTH



### NEXT STEPS

WHAT IS THE EXPERIENCE OF LGBT+ STUDENTS IN EDUCATION?



### WHERE NEXT?

IMPROVING THE JOURNEY TO BECOMING AN APPRENTICE



### WHERE NEXT?

What influences the choices school leavers make?



### WHERE NEXT?

WHO DOESN'T PLAN TO START A FULL-TIME UNDERGRADUATE DEGREE IN AUTUMN?



### WHAT HAPPENED TO THE COVID COHORT?

Lessons for levelling up in 2021 and beyond



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## WHERE NEXT?

THE EXPERIENCE OF INTERNATIONAL STUDENTS CONNECTING TO UK HIGHER EDUCATION





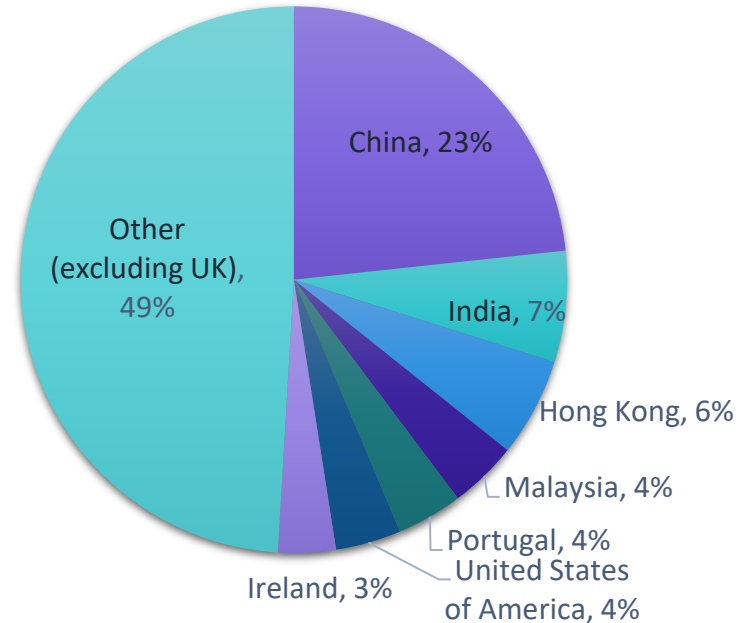
70% of the international students that apply or are planning to apply to the UK also consider another nation



**Who are the international students who apply to the UK?**

# China dominates, with some signs of diversification

- Around **two in nine** international acceptances to UK HE are from China
- New markets are emerging with **Nigeria (+102%)** and **Pakistan (+59%)** seeing notable increases since 2016





# More than half of placed international students enter higher tariff providers



**55%** of placed international students enter higher tariff providers (28% UK)



**Chinese** and **Singaporean** applicants are **five times** more likely to have **five choices** at higher tariff providers than UK applicants



**Irish applicants** are most likely to be placed at **lower tariff providers** and **Nigerian applicants** are most likely to enter **medium tariff providers**

## A high proportion of international students can be accounted for in five subject categories

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%

- The highest proportion of international student acceptances are to **statistics (53%)**, **materials science (39%)** and **artificial intelligence (38%)**.
- 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%)**.

**What does the decision-making process look like for international students?**

# More than **1 in 10** international students are considering HE abroad before their 11<sup>th</sup> birthday

2 in 5

start thinking about HE options abroad before the final years of their secondary or high school education

7 in 10

said that when making their school-leaving qualification choices, they considered how this might affect their ability to study abroad

1 in 2

say that parents/guardians or close members of their family have previously studied abroad

## University or college choice comes ahead of subject



- Importance is placed on the quality (83%) and reputation (75%) of the **institutions** relative to the quality (70%) and reputation (58%) of potential **subjects**.
- Half of respondents ranked the **reputation of HE institutions** in their chosen countries as their number one factor in informing choice of country of study

**What, and who, drives international students to study across borders?**

# International students seek a home away from home

Three quarters (75%) of respondents want to **experience life in a different country** - the most common motivation for study abroad

Study  
abroad



Respondents consistently rank **geographical location** as important - one third of respondents select it within their top three most important factors.

Country  
choice



**Available accommodation** (65%) was rated the second most important amenity (behind teaching and learning facilities)

Amenities



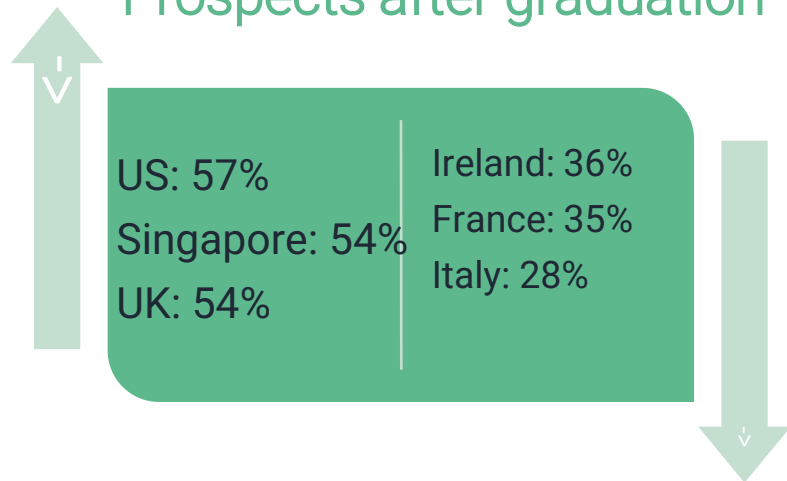


# Motivation differs by nation

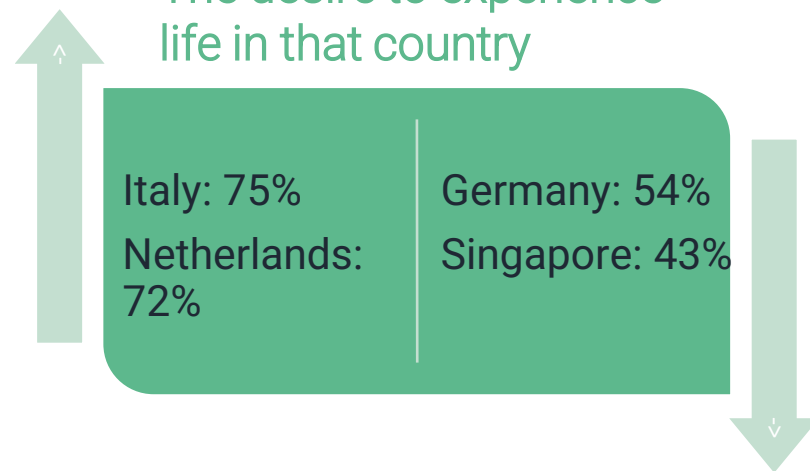
- For students from Nigeria, the most important factor is to **gain skills to support them in their career** (chosen by 80% of Nigerian respondents), and they are more likely to be interested in **employment after graduation** (52%)
- For students from India, the most important factor is that HE options are of '**better quality**' (75% of respondents from India).

# Global HE has something for everyone

## Prospects after graduation



## The desire to experience life in that country



# The current international applicant mindset

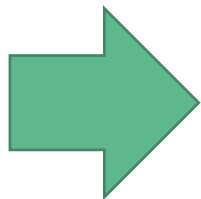
# In May 2023, UCAS surveyed International domiciled applicants (EU and Non-EU)

Quick pulse survey  
of international  
applicants 2023  
cycle

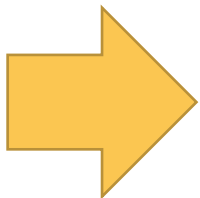
- **Confidence and commitment** – going to university in 2023, obtaining a place, achieving required grades.
- **Preparation and readiness** – information to support and to prepare – accommodation, course content etc.
- **Their intentions** if their grades are better than expected, or they don't achieve the required grades, including knowledge of the Clearing process.
- **Cost of living** concerns, which areas it will impact when at university and their considerations in response.

# Going to university: Commitment and confidence

**How committed and confident are 2023 international applicants?**



97% are committed to going to university



67% are extremely confident they will gain a place at university

**What might help them feel more ready for university?**

- 51% said more information or support from the universities/colleges
- 47% said speaking to the current students at the universities/colleges

# University preparation, readiness and concerns

**Students were asked what information might be useful at this time?**

- Course content (61%)
- Cost of living & financial support (57%)
- Social life (55%)
- Academic support available whilst studying (54%)
- Accommodation availability and accommodation costs (50%)

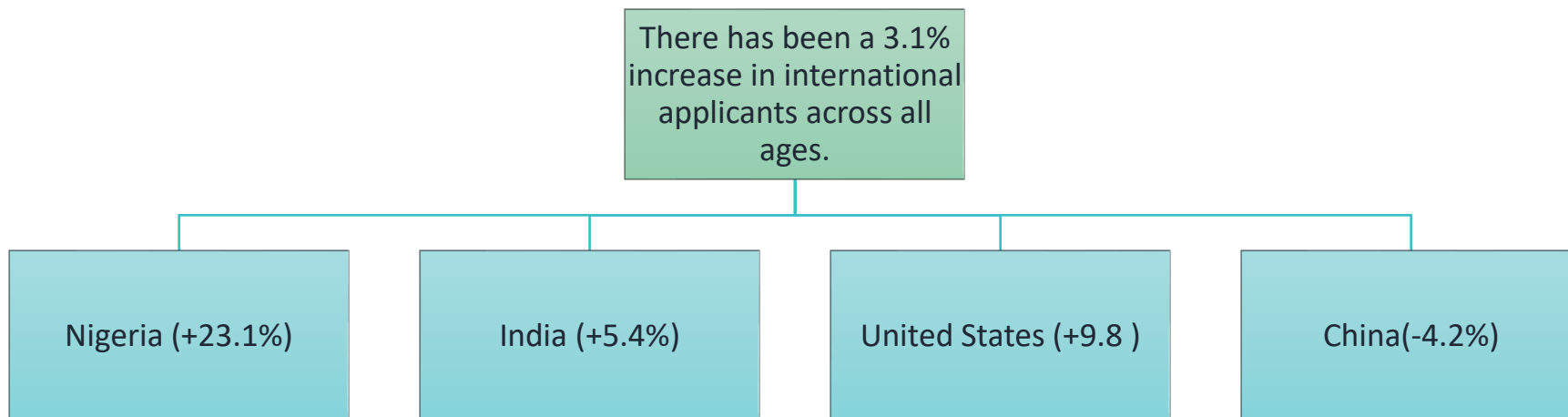
**Thinking about the cost of living, students are most concerned about the cost of:**

- Housing (59%)
- Travel and transport (48%)
- Social and leisure activities (39%)

# 2023 vs 2030: The 'Journey to a Million'



## 2023 so far...



# 'Journey to a Million': The projections

**2030** 1,000,000 | +40,000

**2029** 960,000 | +40,000

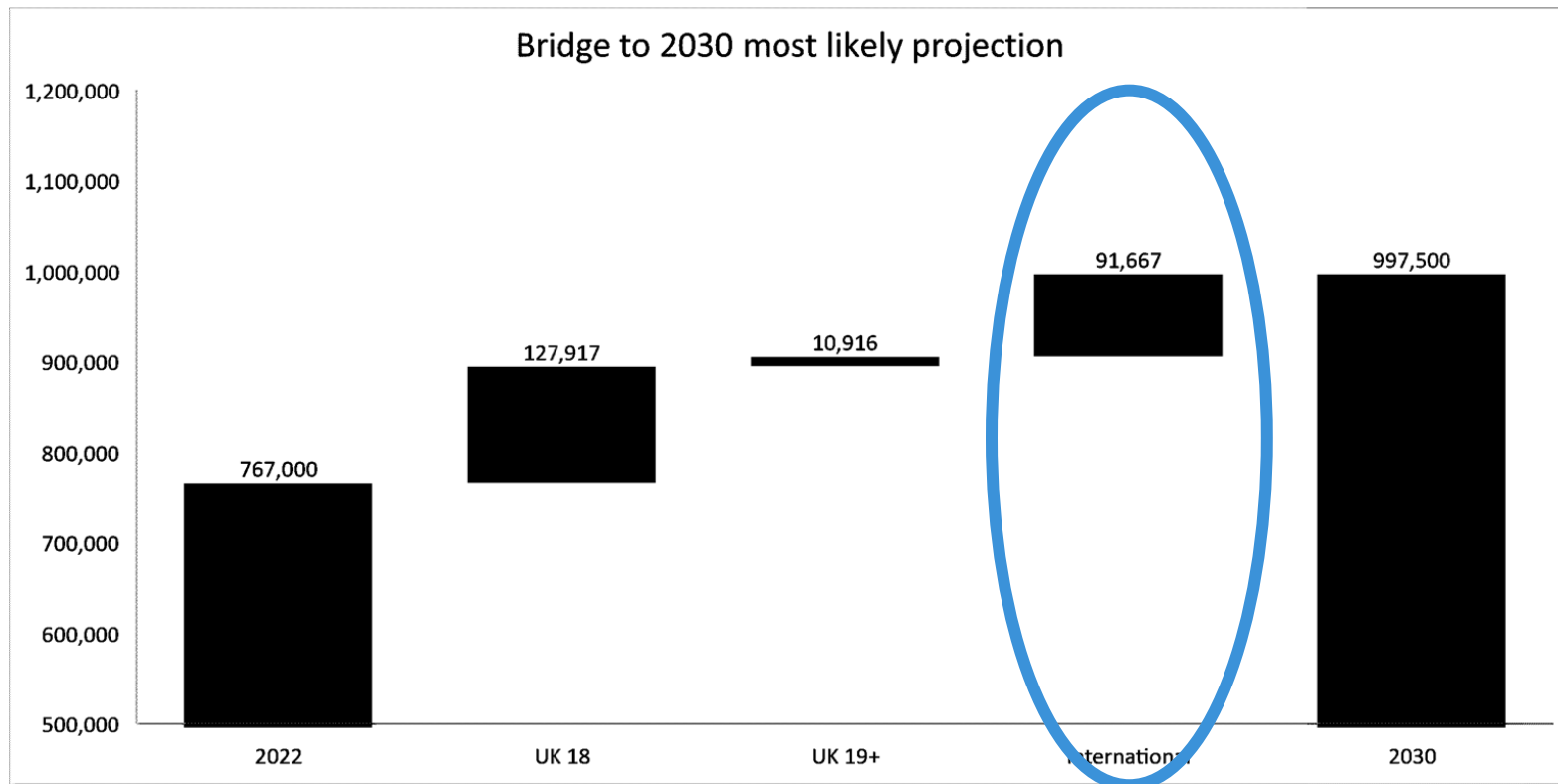
**2028** 920,000 | +30,000

**2027** 890,000 | +30,000

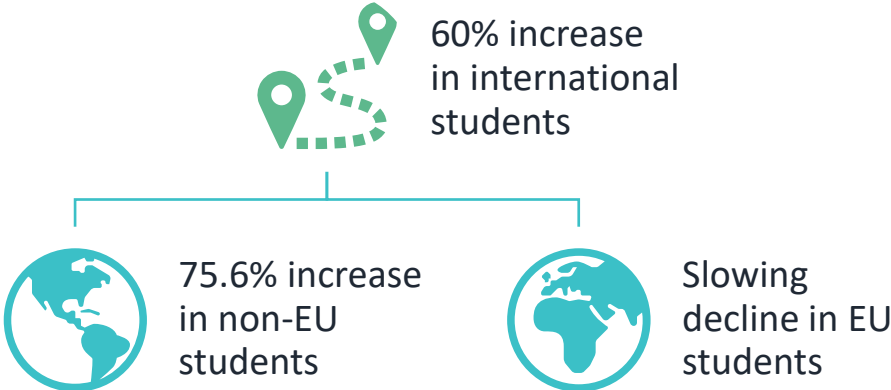
**2026** 860,000 | +35,000

# International students are a major driver

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# A tale of two markets



China 50,000+

India: 40,000+

Nigeria: 13,000+

USA: 10,800

Saudi Arabia: 7,000

# A word of caution...



Geopolitics

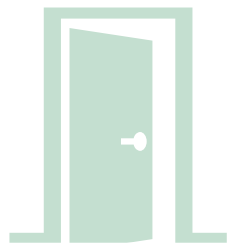


Global competition



Government policy

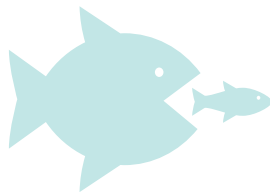
# What does it mean?



**The  
chance to  
diversify**



**Transnational  
Education  
(TNE)**



**Competition  
– at home  
and overseas**



**Economic  
benefits**



**Student  
experience:  
learning and  
living in the  
UK**

# **Where Next? What's the experience of Chinese students in the UK?**

Summer 2023



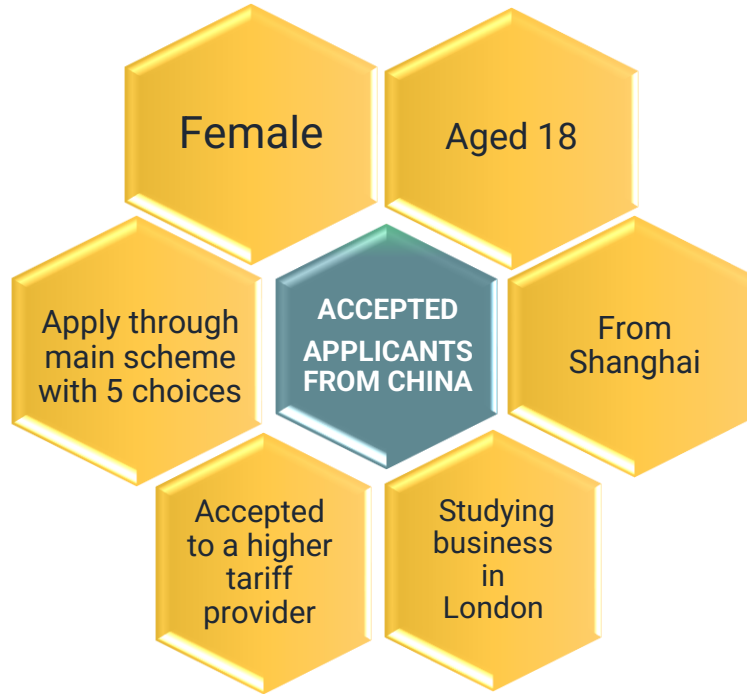
# Objectives

*Support UK HE by building a nuanced understanding of critical student populations*

- The **first of a series of country profiles** under the 'Where Next?' brand, contextualising the progression of individual student groups into UK HE
- Provide comprehensive, and crucially, **post-pandemic**, understanding of the Chinese students who choose the UK as their UG study destination
- Explore the **attributes and journey** of Chinese applicants, tracking their **mindset and experiences** in the UK once enrolled as students
- **Look to the future** – highlight upcoming trends in demand from China as we embark on the 'Journey to a Million' UG applicants
- Work with stakeholders to **build coalitions** of support for data-led recommendations

# Insights so far

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# Discussion time...

- What about this insight most resonates with you in your role?
- Is there anything that surprises you?
- How are you having to adapt your guidance to meet the changing needs of your students?

