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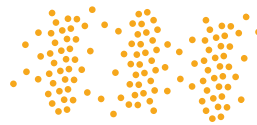
# About the International Student Survey



Over the last two years, the UK higher education sector has shown its resilience and strength. In pivoting their teaching practices to rely on virtual delivery, universities were able to demonstrate their ability to respond to significant challenges in an effective and agile manner. As we emerge from the COVID-19 pandemic, the focus for many institutions will now be how to build their resilience against upcoming, unforeseen challenges and how to ensure their strategies are adaptive and future-proofed against these.

In its tenth year, the International Student Survey (ISS) has grown to become the world's largest survey of pre-enrolled international students. The 2022 iteration is our largest survey ever, able to draw on the responses of over 110,000 prospective international students from 194 countries and territories around the world. These respondents were collected in partnership with 94 universities and organisations from 21 countries. By analysing the results from this survey, this report seeks to provide a comprehensive outlook on how universities can adapt their recruitment strategies and how to communicate with prospective candidates in an authentic way, on the issues which matter most to them.

With international recruitment cycles now starting to return to pre-pandemic levels, this year's survey seeks to understand the expectations from candidates with regards to the social and environmental responsibilities of universities, as well as attempting to gauge the alternative learning models in the future, such as hybrid learning. The analysis and results in this report will help universities understand the long-term impacts of the COVID-19 pandemic on student decision-making and give them a more in-depth view of the level of support which international candidates are expecting from their universities. The shifting geo-political landscape has also highlighted the potential risks of universities becoming over-reliant on any single market for their international recruitment. The ISS continues to highlight how universities can pivot their strategies to diversify their pool of international students and ultimately, build their resilience against these shifting political currents.



## Get a free place for your university in the next International Student Survey

Participation in the International Student Survey is free for universities, and all participating institutions receive a free benchmarking report with useful insights for student recruitment.

For more information visit

[www.internationalstudentsurvey.com/take-part](http://www.internationalstudentsurvey.com/take-part)



# Key facts



**110,306**  
responses



37% Undergraduate  
60% Postgraduate  
3% Foundation or Vocational



**94**  
institutions participated



22% Business and Management  
10% Engineering  
9% Social Sciences



**194**  
countries and  
territories represented



36% Male  
61% Female  
3% prefer not to say or prefer  
to self-describe



**63,598**  
interested in UK



40% aged 17-20  
36% aged 21-24  
24% aged 25 or older

Data is weighted by nationality to reflect profile of current first year international students in the UK, as reported by Higher Education Statistics Authority<sup>1</sup>



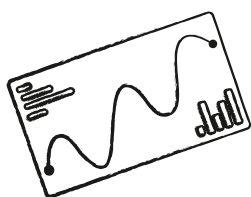
### Household income

16% <\$10k  
14% \$10k-\$25k  
12% \$25k-\$50k  
21% >\$50k

# Foreword

As the UK begins to emerge from the effects of the disruption caused by the COVID-19 pandemic, this year's QS International Student Survey (ISS) has demonstrated the incredible resilience of the UK higher education sector. Despite significant disruption to travel and lockdown restrictions over the last 24 months, the sector has not only exceeded the commitment of the International Education Strategy (IES) to host 600,000 international students in the UK, but it has achieved this a decade ahead of schedule.

International students have continued to put their faith in UK higher education, viewing the sector as welcoming and attractive, boosted by the speed of the vaccine rollout and the measured lifting of COVID-19 restrictions, alongside action by the Government to make sure that visa flexibilities and hardship support were available. As a result, we have seen record numbers of students arriving from source countries such as India, China and Nigeria, which have helped to alleviate the decline of students arriving from the EU following Brexit.



Vivienne Stern  
Chief Executive of  
Universities UK

Yet this year's Survey shows that we as a sector can do more to attract students from those source countries outside of the EU. We need to recognise and address the barriers that international students who plan to study in the UK face - ranging from delays in processing their study visa, to restrictions on international travel in their home country. It is vital that the UK higher education sector continues to appreciate the diverse nature of each year's international student intake, working to cater for the individual needs of each prospective student.

Like every sector, the pandemic has changed the way universities work, with significant advances made in digital teaching and learning. Students have been clear that these developments help them learn, can make the learning experience more accessible and flexible, and enhances digital skills valued by employers. Many universities have responded to this positive student feedback by including some digital learning alongside in-person learning opportunities. Universities understand the value of face-to-face teaching, however, with in-person teaching and learning being the main method of delivering most courses at most universities across the UK.

*“International students have continued to put their faith in UK higher education”*

Another of the key themes in this year’s report is the growing expectation from students for institutions to go further in terms of their environmental and social responsibilities. At Universities UK International, we have been putting more emphasis on helping universities navigate the links between their carbon reduction goals, and their international ambitions. It is clear there is much work to do.

The UK higher education sector is well-equipped to step up to these future challenges, but the continued resilience of our sector cannot allow us to become complacent. That is why the ISS remains invaluable, as both an insight into the expectations of prospective students but also a reminder that the sector must remain agile so it can quickly adapt to meet the needs of students as new dynamics emerge.





# Recommendations

## 1 Recruiting from diverse international markets

*Universities should tailor their recruitment strategies for different student export markets to sustain the success of the Government's International Education Strategy*

Overall, the UK is seen as a safe destination for international students, especially across broad swathes of the Americas, Middle East and Africa. A combination of relatively low crime rates, a pre-existing substantial international student population and strict gun laws reiterate the UK's attractiveness as a study destination. This has been reaffirmed by the UK hitting its target of recruiting 600,000 international students a year as part of the Government's International Education Strategy (IES) nearly a decade early. In order to sustain the success of the Strategy, Universities should now look to promote these elements when communicating with prospective students in individual markets.

By developing a tailored approach for priority and potential growth markets identified as key in the IES including Vietnam, India, Nigeria, Saudi Arabia and China universities can more effectively recruit from them. Different markets will have different priorities when choosing a university, and this should be reflected in the way that universities' communication strategies are developed. Communicating high quality teaching, strength in reputation and global rankings credentials as well as a welcoming environment for international students will be necessary to cover all markets when tailoring these targeted communications. In addition, the ability to reassure prospective students about the quality of life they can expect and that they will be safe whilst on campus will be essential in easing some of their concerns about moving overseas.

## 2 Enhancing the UK's appeal as a study destination

*To remain competitive with other leading destinations for international students and to boost post-pandemic economic growth the UK must review its current policy on the Graduate Route, the current two-year post-study work visa.*

To support the UK higher education sector the Government should adopt a more flexible approach towards international graduates that have finished their studies in this country. Raising the threshold of the post-study work visa from two to three years would bring the UK in line with many countries around the world which host large numbers of international students. This includes key competitors such as Australia who have extended their visa regulations to help stimulate economic growth after the COVID-19 pandemic. Indeed, our research shows that nearly two-thirds of candidates would be more likely to consider the UK as a destination if the amount of time they could remain after graduating was

raised to three years. Given the net economic benefit of international students in the UK was recently estimated at £25.9 billion<sup>2</sup>, this represents a significant sum and demonstrates the potential impact this move could have. Furthermore, the data shows that only a small minority of students plan on remaining in the UK indefinitely, busting the myth that large numbers want to stay permanently in the UK after they've completed their studies.

Previous moves in this area, most recently the extension from four months to two years in September 2019, highlights how vital the extension was in the sector achieving its target of recruiting more than 600,000 international students nearly a decade early. At the time, this announcement was well received by the sector and showed the Government was listening to the demands of students. The current policy and restrictions should be reviewed to help stimulate further growth in the sector following the pandemic and position post-Brexit Britain as an equally welcoming destination for international students as its key competitors.

### 3

#### **Showcasing environmental impact and social responsibilities to students**

*Universities can and should do more to demonstrate their commitment to environmental, social and governance (ESG) strategies to students*

The next generation of students increasingly expect universities to take an active role in supporting their local communities and the societies in which they operate. There is also an expectation that the HE sector is at the forefront of developing new technologies to help us all live more sustainably. Whilst it is encouraging that candidates regard the sector as environmentally friendly, 4 out of 5 candidates we spoke to also said that they expect universities to be doing more to further the sustainability agenda and combat climate change. Universities therefore need to ensure they are communicating, as well as improving their sustainability activities across a range of areas. This includes the reduction of single-use plastics and introducing energy efficiency measures to help accelerate progress towards becoming carbon neutral.

As well as highlighting environmental impact, communicating social responsibilities and support to students is still important to candidates. A continuing but significant minority of candidates remain cautious about approaching universities for support for their mental health. The enduring stigma of talking about this issue in many locations across the world, makes it essential that universities have established procedures and practices in place to cater to different students' needs. Access to professional services in this area, which can effectively prioritise the anonymity of users are the most effective way for universities to make progress on this issue.



## 4 Adopting a hybrid way of working

*Universities should ensure that forms of online learning continue to be available to international students as we return to a predominantly face-to-face teaching environment post-pandemic*

As we emerge from the pandemic and students increasingly return to face-to-face learning it is important that institutions recognise the perceived benefits and the demand for a hybrid learning experience from a significant cohort of students. Data from this year's survey highlights the appetite for this form of learning among students with nearly half of candidates saying they would be interested in a hybrid learning experience, by combining virtual and in-person studying.

Whilst in-person teaching will continue to be the most popular avenue for the majority of international students, universities should look at how they can optimise their alternative learning structures to incorporate online learning in specific ways. By adopting this approach it can help to ensure the future resilience of universities in the event of future disruption or as new teaching technologies develop.

## 5 Offering multiple intakes to students

*Universities that don't offer multiple intakes on some courses should reconsider their approach to boost their appeal so students can enrol throughout the academic year*

The majority of students enrol at their chosen university in September, however travel restrictions due to ongoing COVID-19 measures in their home countries or delays in visa processing means that some students have to delay their plans for international study. This year's survey found that nearly a third of candidates viewed a course offering multiple intakes as an important factor in their decision-making, meanwhile over half of candidates felt that offering multiple intakes made it seem like the university was trying to make it easier for them to enrol.

Universities need to carefully consider which student cohorts are offered the option of applying to multiple intakes. However, by recognising its importance in the pre-enrolment journey and offering a flexible approach through multiple intakes during the year it creates a positive view of the institution, which can help with long-term strategic planning for future intakes.

Section 1

**How universities can embrace their social and environmental responsibilities**



# Key findings

**73%**

of UK-bound candidates think the UK is an 'extremely' or 'very' safe destination for international students

**81%**

feel that the higher education sector is environmentally friendly, however 80% also feel they could do more to help the environment

**56%**

think that reducing the amount of single-use plastics they use is an ambition all universities should be aspiring to

**19%**

of UK-bound candidates would be uncomfortable coming forward and asking a university for help and support with their mental health

As universities come to terms with the long-term impact of the COVID-19 pandemic, it has become increasingly important to refocus recruitment strategies around evolving issues and challenges being prioritised by the next generation of international students. These students have a more comprehensive understanding of the social and environmental impact responsibilities of universities and will actively seek out those universities who can communicate their credentials in a credible and authentic manner.

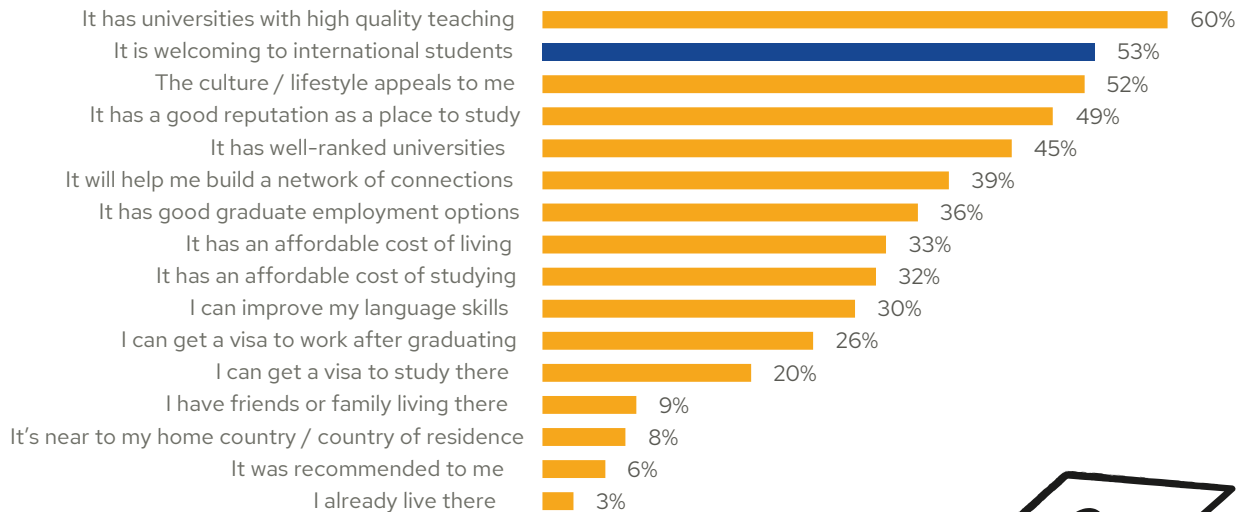
This section will gauge the responses of prospective international students to understand what kind of support they expect from universities on student safety and access to mental wellbeing services. It will also examine their views of universities with regards to their environmental and social impact credentials and analyse how universities should be communicating their activities to this audience.

# Is the UK regarded as a 'safe' destination for international students?

From previous iterations of the International Student Survey, we know and understand the myriad of factors that go into a prospective student's decision making with regards to their studies. Student safety consistently emerges as a priority for this audience when thinking about where they would like to study. Given the importance of this issue, it is vital to provide a comprehensive overview of perceptions of the UK as a study destination and to understand how its perception as a 'safe' country for international students can be adapted.

When asked what the most important factors are when choosing a country to study in, a welcoming environment for students emerged as the second most popular answer, with over half of all prospective students identifying this as a factor in their decision-making. This focus on student safety carries through to all aspects of their pre-enrolment journey, as it also features in their decisions about what town or city they may live in during their time overseas. We also know that whether they will be made to feel unwelcome when they arrive at their destination is a prominent source of concern both for the student and for their parents. Given these findings, it is vital to further enhance our understanding of how the UK is perceived with regards to international student safety and to identify how it can improve on these perceptions.

## What five things are most important to you when choosing a country to study in?



To build on these findings, we also asked prospective students how they feel about the UK and whether they believe it to be a safe destination for international students. Somewhat encouragingly, nearly three-quarters of all prospective students believe the UK to be a safe country, with 23% perceiving it as 'very safe' and a further 50% finding it 'somewhat safe'. Only a relative minority of 13% expressed any negative sentiment with regards to student safety in the UK. The broadly positive response here is a good sign for the HE sector here in the UK, and reiterates the notion that the country has a variety of positive perceptions to draw upon when recruiting students from overseas.

However, a more in-depth look at the data reveals some significant regional variations at a global level, which must be taken into consideration. The UK is very positively perceived across Latin and North America, as well as in large parts of Africa and the Middle East. Over 80% of prospective students from each of these regions express the view that the UK is either extremely or somewhat safe for students and 10% or fewer believe the UK to be an unsafe destination.

Respondents from these markets were then asked to express why they thought the UK was a safe destination for international students. Many of these then referred to low crime rates and a diverse population, which reinforced their perception of the UK as a secure and welcoming destination for international students:

*"Because there is little crime, and it is a country where there are a lot of international students."*

Argentinian candidate

*"The UK gives international students a sense of security when moving to the country, for example the support we receive from universities and other committees."*

Canadian candidate

*"The United Kingdom is a country known to have a wide variety of international students, which helps shape the culture and facilitate their transition from their home country. Additionally, the United Kingdom is also a safe country in general."*

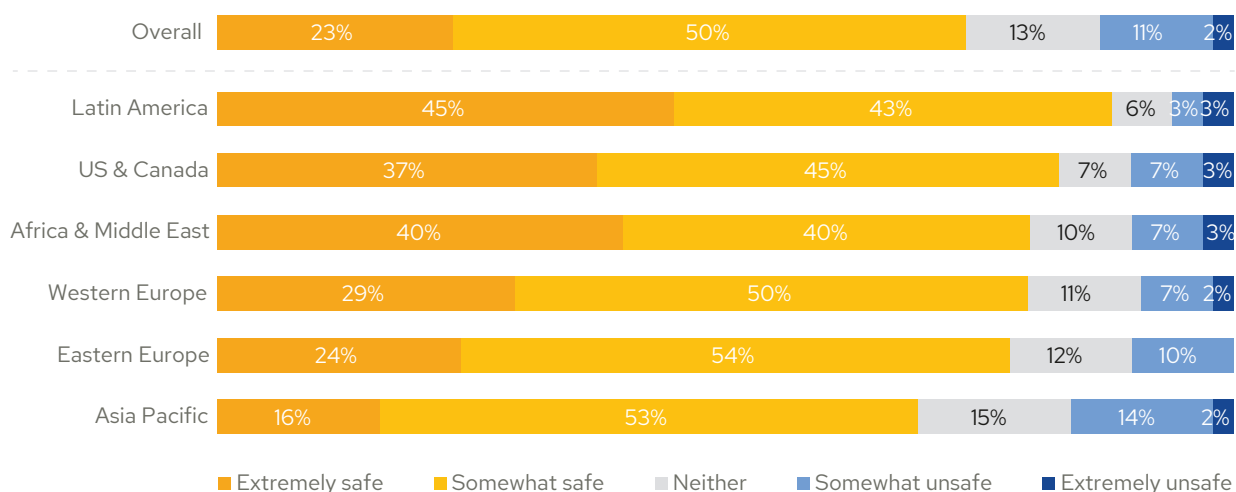
Brazilian candidate

*"Because it is a mostly English speaking location and there is way less gun violence than America."*

USA candidate

However, the view of the UK is more muted in the Asia Pacific region. Whilst over two-thirds retain a positive opinion of student safety in the UK, a significant minority of 16% believe the UK to be either somewhat or extremely unsafe for students. Given the importance of this region to the UK higher education sector, both in terms of current numbers of international students and in its potential to recruit students from in the future, there is a clear need to better understand what might be driving some of these negative perceptions. It is also equally important that universities are able to address these issues in their communications with this audience and to offer specialised support for students who feel unsafe during their studies.

## How safe do you think the UK is for international students?



Given the comparatively negative response from candidates in Asia Pacific, we can further segment the results to this question, to identify which locations are driving this. As a follow up, respondents were also asked to express why they felt the UK was an unsafe destination in their own words. In doing so, we hope to highlight how institutions can address this issue in their marketing communications and how they might demonstrate their commitment to student safety with their own initiatives.

Looking at the responses from specific locations again reveals some significant variations which need to be considered. On a more positive note, perceptions of student safety in the UK are just as strong in India, Indonesia, Thailand and Vietnam as they are in other parts of the world. However, it is important to note that in key markets for many universities, the view of the UK is significantly more negative. Candidates from China, Singapore, South Korea and Taiwan are all more likely to view the UK as an unsafe destination, with nearly a fifth expressing this viewpoint.

When asked why they thought the UK was an unsafe destination, a number of themes emerged. Many responses referring to specific incidents of racial discrimination or feelings of general vulnerability when on non-campus venues, which were then reported on in local news outlets.

*“International students may be attacked by local people/students, for example, the incident in Sheffield in late 2021.”*

Chinese candidate

*“I have hundreds*

*“Racial discrimination, unable to work alone at night, cat-callers.”*

Singapore candidate

*of foreign friends (mostly Asians) who are studying in the UK and the majority of them have experienced discrimination minor crimes or racism. I cannot say the whole UK is unsafe but it is true that certain places are not safe for international students, especially female Asian students.”*

South Korean candidate

*“Haven’t heard that UK is particularly welcoming for Asian students.”*

Taiwanese candidate



Other issues which arose also related to the UK’s government’s policies with regards to COVID-19, which were often significantly less restrictive compared to those in their home country. This then also led to heightened fears that they might get infected or experience health complications whilst abroad:

*“UK lifts epidemic prevention and control measures, a large number of international students are infected with COVID-19.”*

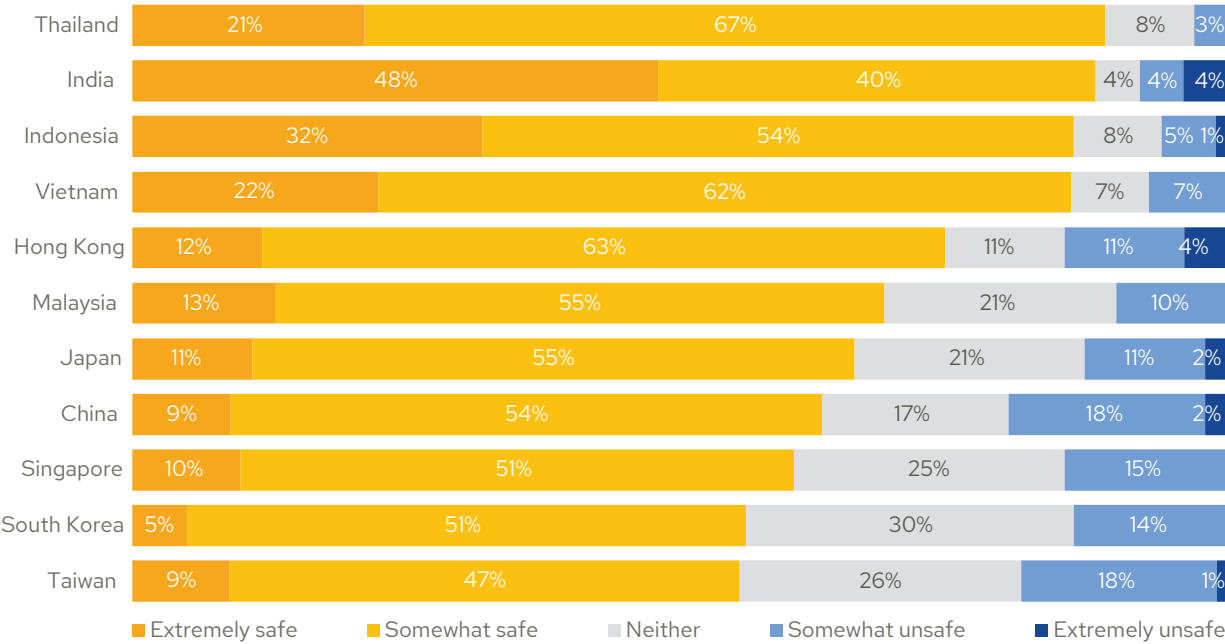
Chinese candidate

*“COVID-19 prevention and control measures are not in place, I am really afraid that I am infected in UK.”*

Chinese candidate

Given these concerns from candidates in specific markets, it may be a worthwhile initiative for universities to develop specific strategies to address these concerns and to communicate those to candidates in the pre-enrolment journey.

### How safe do you think the UK is for international students?





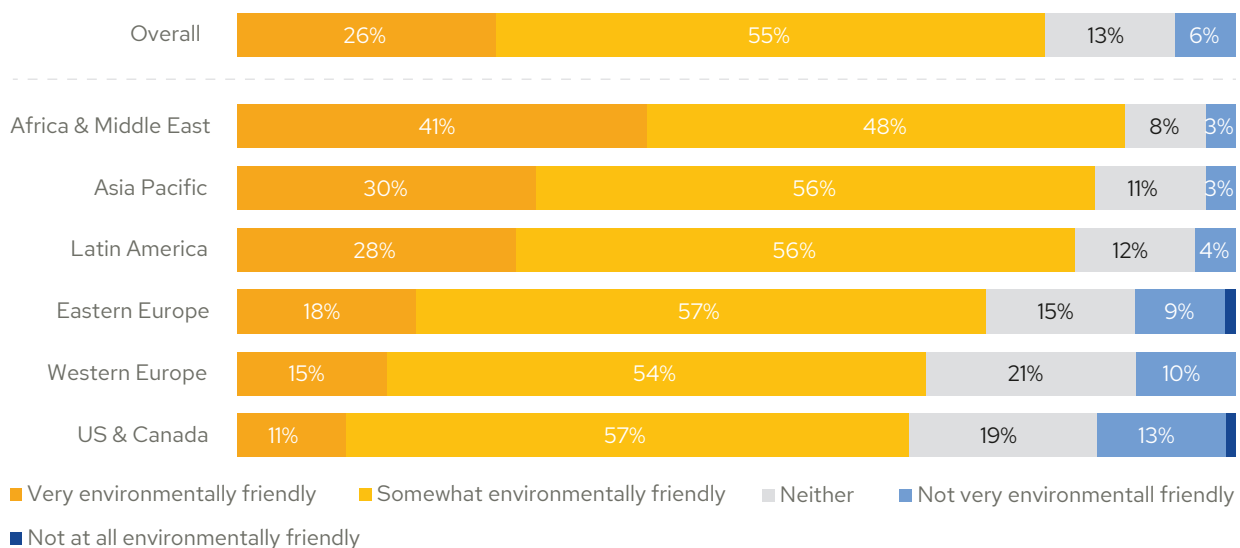
# How universities can communicate their environmental impact credentials

The higher education sector is no exception to the critical global issue which affects us all, of environmental sustainability. Students are increasingly demanding of the brands and companies they interact with to communicate their commitments to reducing their carbon footprint and improving their environmental sustainability. It is crucial to understand how students perceive the higher education sector’s performance on this issue and identify areas where they believe universities should be directing their efforts to contribute most effectively.

On a positive note, 81% of all prospective students believe that universities are either very or somewhat environmentally friendly. This reiterates the findings from the Environmental Concerns survey<sup>3</sup> conducted by QS in August 2019, where a similar proportion of candidates believed universities were performing well on this issue. The overwhelmingly positive response here is a clear and encouraging testament to the commitment and dedication of universities. It also reiterates the notion that the HE sector appears to give this issue more of a priority compared to other sectors. This is reflected in the way it allocates funding and resources to address the issue, which help to place universities at the cutting edge of helping industries and individuals to reduce their carbon footprint and limit global warming.

However, it is also important to note that there are significant regional variations in the responses to this question. Candidates from Africa, Middle East, Asia Pacific and Latin America all have a broadly positive impression of universities when it comes to their environmental credentials. It is clear that universities must work harder to convince the views of candidates in Europe and North America where there are significantly higher levels of scepticism. Universities need a clearer and more actionable set of communications with candidates from these territories if they are to fully convince them of their credentials in this area.

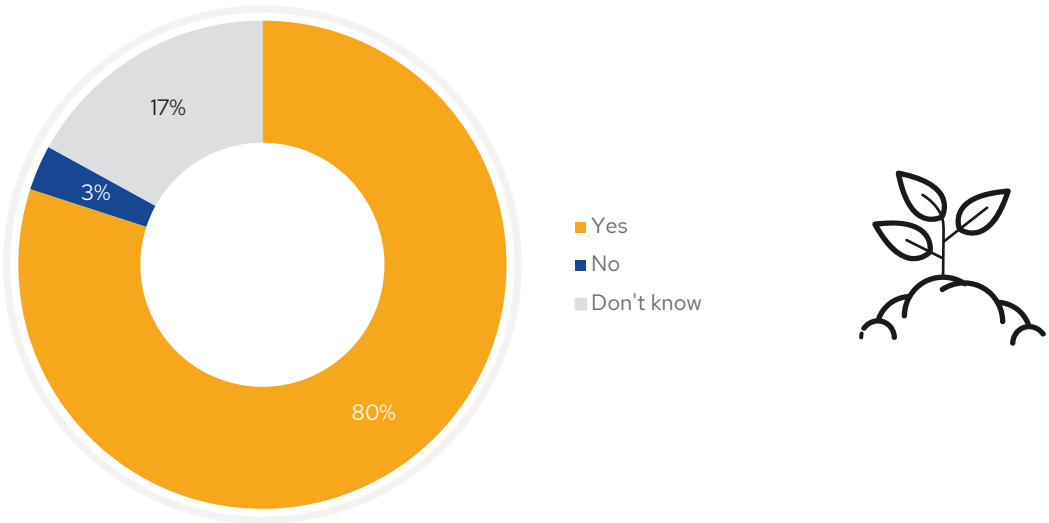
## In general, how environmentally friendly do you think universities are?



Despite the broadly positive response to the above question, the overwhelming majority (80%) also agree that universities could do more to be environmentally sustainable. Whilst candidates do believe that universities care about the environment and exhibit environmentally-friendly behaviours, they are expected to do more.

For many candidates, there is an expectation that universities should be at the forefront of developing new technologies and conducting new research on how to be more sustainable.

### Do you think universities could do more to be environmentally sustainable?



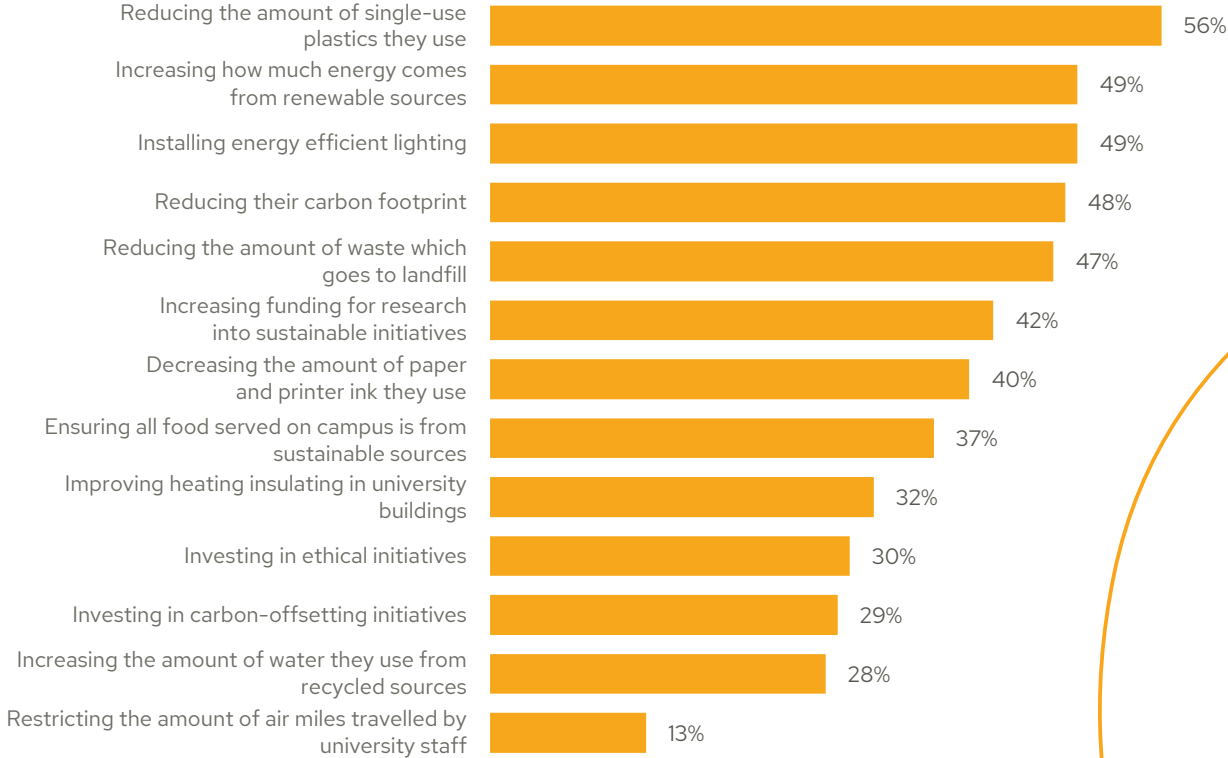
To help universities prioritise their efforts, respondents were also asked a follow up question, to identify the most important environmental activities they thought universities should be engaging in. It is important for us to answer this question, as the results may be useful for universities to incorporate into their marketing and communication strategies, thereby enhancing their own reputation. It is also important to draw the distinction between the operational activities of universities and the research and fundraising initiatives as well and how both of these relate to the environmental sustainability of the university.

The most popular answers all relate to the operational activities of a university – reducing the amount of single-use plastics, increasing their energy use from renewable sources, installing energy efficient lighting, reducing their carbon footprint and reducing waste to landfill. Whilst these are all important areas and provide ample opportunity for universities to communicate their efforts to students, it should be noted that funding and research into sustainable initiatives remains one of the most effective ways for universities to engage with this issue. Universities need to ensure they are investing in practical initiatives as well as allocating funding for sustainable initiatives and that this is reflected in their programme of research.

It is also important to note that once again, there are significant regional differences when looking at the results to this question. For candidates from Western Europe and North America, reducing their carbon footprint was the most important perceived goal for universities to contend with. Likewise, for candidates from Africa and the Middle East, they were significantly more likely to prioritise the amount of funding the university allocated for research into sustainable initiatives. For candidates from Eastern Europe, building insulation is a significantly greater issue, and so is given more of a priority.

The varying responses here reiterates the importance for universities to have sophisticated marketing strategies in order to communicate the range of activities they have engaged with around the issue of environmental sustainability. When communicating their efforts, universities need to acknowledge that student expectations extend across different areas and that this needs to be incorporated into the way they market themselves to students. These are the most actionable steps which universities can take to both meet student expectations and boost their own sustainability efforts.

### What five environmental activities are most important for universities to engage in?



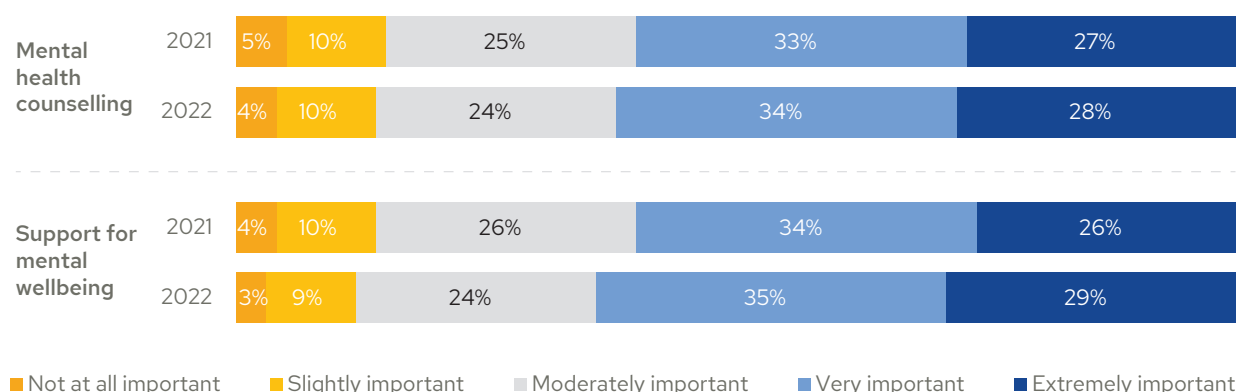
# How universities can improve their mental health support for international students

COVID-19 has led to an increased level of scrutiny of universities and the support they provide for their students when it comes to their mental health and wellbeing. The restrictions imposed on students over the last two years have rightly been a cause for concern for students and universities alike, and there have been a series of additional measures implemented in an attempt to address these. It is necessary to track the perceived importance of university support services to ensure that they are both prioritised accordingly and set up to ensure they are accessible to all types of student cohorts.

From our work on previous iterations of the survey and from research conducted throughout the pandemic, it is clear that many students are concerned about the level of support they might receive when attending university and it is important for universities to communicate how they can support their students on this subject. When asked about this, 62% believed it was either extremely or very important that universities provided mental health counselling (compared to only 60% in 2021). Additionally, 64% thought it important they provide services for support with students’ mental wellbeing (compared to only 60% in 2021). The fact that nearly two-thirds of candidates recognise the importance of these services for students should reiterate the priority that universities allocate towards this particular issue.

Both of these support services are in greater demand when compared to the 2021 ISS data, which reiterates the enhanced level of scrutiny which the pandemic has placed on this issue. In our previous edition of the ISS, we suggested that international students in the UK were less likely to reach out for help with their mental health compared to domestic students, owing to the enduring stigma attached to the issue in many locations. However, the data from this year’s survey would suggest that international students are increasingly aware of this issue and are concerned about the level of support they might receive when attending university. It is important for universities to communicate how they can support students on this subject with targeted, and dedicated support structures.

## How important is it to you that the university you choose offers the following support services?



For many international students, the prospect of attending university overseas can be a daunting one. The combined pressures of university work and leaving home for the first time, away from their family and friends can be enough to leave many feeling overwhelmed. To ensure that universities are able to support international student cohorts effectively, it is necessary to examine how willing these students are to proactively seek out support from a university.

When asked how comfortable international candidates would be asking a university for support with their mental health, nearly a fifth (19%) claimed to be 'uncomfortable' or 'very uncomfortable' when doing so. This reiterates the notion that a significant proportion of international students may be prevented from seeking help with their mental health when they need it, due to the stigma of talking about their mental wellbeing. Universities need to acknowledge the unique circumstances of their international student cohorts now more than ever. The fact that there is a heightened reticence to willingly seek out help when they need it most, reinforces the need for universities to tailor their support services accordingly.

As a follow up to this question, we also asked those candidates who claimed they might be uncomfortable coming forward and asking a university for support with their mental health, why that might be. Many of the responses which emerged focused on the prioritisation of anonymity when using these services. It is likely this relates to the stigma of talking about one's mental health in many locations around the world and reiterates the importance of emphasising this in university communications:

*“When you are not in a good place mentally it’s hard to ask for help. A process that lets you ask for help anonymously would make things much easier”*

---

*“Face to face communication will make me feel very embarrassed, because it is exposing my pain and unbearable. I think it’s best to provide anonymous or online consulting services, which is more convenient and relaxed for me”*

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*“If ever I am dealing with a very traumatic and personal issue, that could be unintentionally uncomfortable for the university to know. An anonymous platform or credited, stable and trusted professional in the university could help make me feel comfortable to share about my mental health”*

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Several other responses focused on the need to access qualified professionals when talking about these issues. This reflects the findings from previous iterations of the ISS, which suggested that access to a mental health adviser or student counselling sessions were the most in-demand services from students.



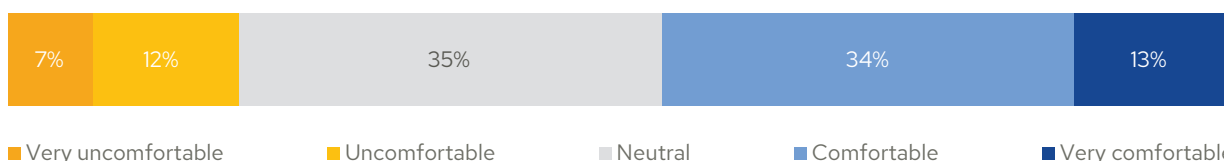
*“With the increase in mental health challenges all over the world, I think it will be a good idea for everyone to set aside their pride when approaching a professional for advice. One can only get a good counselling when you are open. With that understanding, if I feel there is a need to see a specialist at the University, I will gladly embrace it.”*

*“I would be uncomfortable because of society bias and negative societal opinion towards mental health. I will feel more comfortable if there is regular contact by student advisors or professional counsellors from the student affairs department of the University”*

*“Because I’m generally uncomfortable about seeking help on mental issues. What would be helpful is to have online sessions with the school counsellor maybe and with time progress to on-site”*



How comfortable would you be asking a university for support with your mental health?



## In summary

Universities are increasingly aware of their social and environmental responsibilities and of the need to communicate their activities in this area to their student cohorts. It is vital that universities are engaging across a range of operations with regards to their environmental sustainability efforts and that they have the capabilities of communicating these to a wider audience. Whilst universities have made excellent progress with the mental health support they provide to their students, it is clear that a more targeted approach can be effective in addressing the stigma which continues to surround the issue for some international cohorts.



Section 2

# New ways of learning





# Key findings

**78%**

of candidates expect the majority of their teaching to be conducted in a face-to-face environment when they begin their studies

**67%**

of candidates believe that interaction with other students becomes more difficult in a virtual setting

**47%**

of candidates would be interested in a hybrid learning experience, combining virtual and in-person studying

**72%**

of candidates would be interested in taking part in a student exchange programme as part of their studies

The last two years have seen a dramatic shift towards the adoption of online learning platforms, bringing with it new tools for collaboration, interaction and engagement. As we emerge from the pandemic, we wanted to understand the longer term implications of how this shift may have impacted perceptions of, and interest in online learning. It is also important to gauge the potential for new and alternative ways of learning outside of the traditional teaching structures which have dominated higher education up to this point.

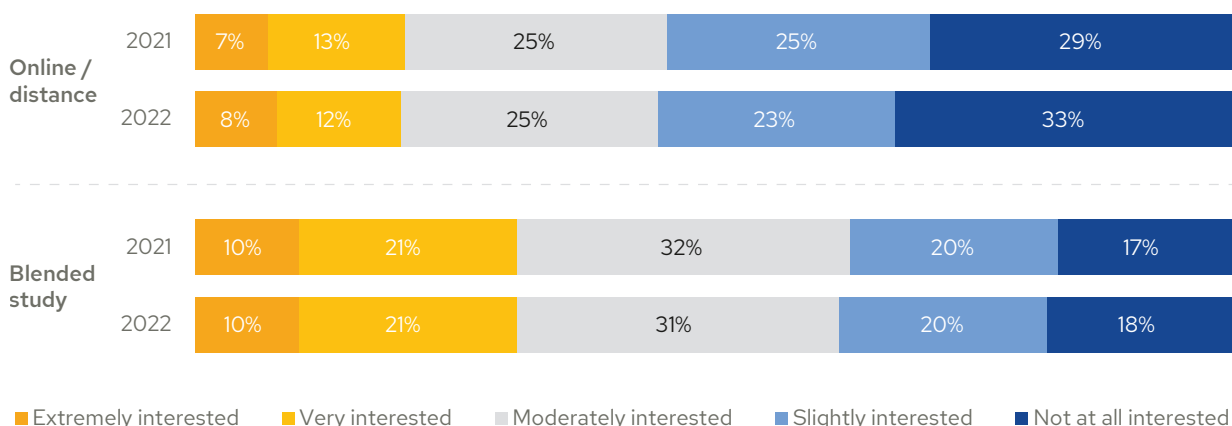
In this section, we analyse how interest in online learning has evolved throughout the pandemic and go on to highlight the perceived benefits, and enduring barriers that limit its adoption. In doing so, we hope to provide guidance on the long-term role for online learning in higher education and to illustrate the potential for hybrid learning and student exchange programmes. In doing so, we hope to demonstrate how universities can optimise their alternative learning structures, helping to support universities' long-term planning and resilience.

# How has interest in online learning evolved in the last two years?

When asked how interested they would be in studying for their degree via a variety of online platforms, only 20% of prospective candidates were either 'extremely' or 'very' interested in online or distance learning in 2022. This is broadly consistent with the 20% who were interested in 2021, which suggests that the pandemic has done little to enhance the long-term potential for a purely virtual learning model. This notion is reiterated by the fact that the proportion who are not at all interested in online learning has increased from 29% in 2021 to 33% in 2022.

There is considerably greater interest in a blended learning model which combines distance and on-campus learning. 31% of candidates claimed to be either extremely or very interested in this form of study. This demonstrates that a significant proportion of prospective students would be happy to study at least part of their degree online and that they recognise the role for online learning in specific parts of their degree. Many candidates recognise online learning as a viable alternative, lending it sufficient market potential as to warrant further attention from universities. Universities need to take note of this and consider how they can adapt their teaching structures to incorporate online learning in specific ways for students. Whilst in-person teaching is by far the most popular avenue (and is likely to continue to be popular) in the medium-term, there is a growing cohort of candidates who are actively seeking out a blended learning approach.

## How interested are you in the following delivery options?



In order to better position the benefits of online learning practices, it can be useful for universities to look at those who are interested in online study and analyse why they would do so to guide their online capabilities. We can also examine the barriers to online study and evaluate whether these can be addressed in communications with this audience to further increase interest in online study.

When looking at why this audience would consider an online degree, the most widely perceived benefits are the convenience of studying from any location and the flexibility it offers to students with 77% and 74% selecting these options respectively. These two options are inextricably linked, and when thinking about how to promote the benefits of online learning are the most reliable avenues to enhance engagement.

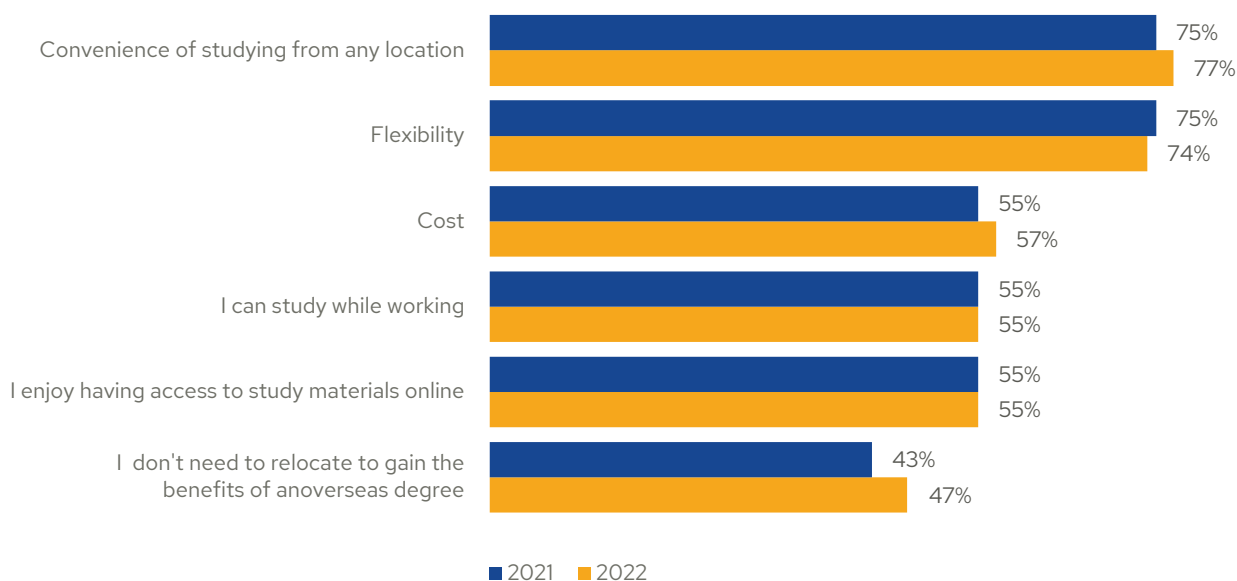
Interestingly however, other benefits have become much more visible post-pandemic which are worthy of note. 55% of candidates recognise the benefits of being able to study while working when taking an online degree. This represents a significant increase from 2021 and suggests that many candidates have benefited from being able to earn an income during their studies and the heightened control they have over how they allocate their time. Universities need to take note of this and consider the support they are able to provide to international students when it comes to finding a job during their studies.

Another key benefit which has become increasingly recognised post-pandemic is that they don't need to re-locate to get the benefits of an overseas degree, with 47% of candidates selecting this option. Again, this represents a significant increase from 2021, when only 43% of candidates recognised this as a potential benefit. The reason for this increase is most likely linked to the fact that they can continue to work and receive an income during their studies, as they aren't subjected to any restrictions on the number of hours they can work in their home country.

Of further interest is the fact that the cost savings of an online degree are still not seen as a prominent benefit of online learning, compared to the flexibility, convenience and the option to continue in employment. This does suggest that any messaging which highlights the discounts for studying online are not as likely to resonate as much as other benefits associated with online study.



## Why are you interested in studying for an online degree?



By contrast, we can also look at the perceived barriers to studying for an online degree. When asked about this, access to the facilities of a university remains the most prominent barrier, with 79% of candidates selecting this option.

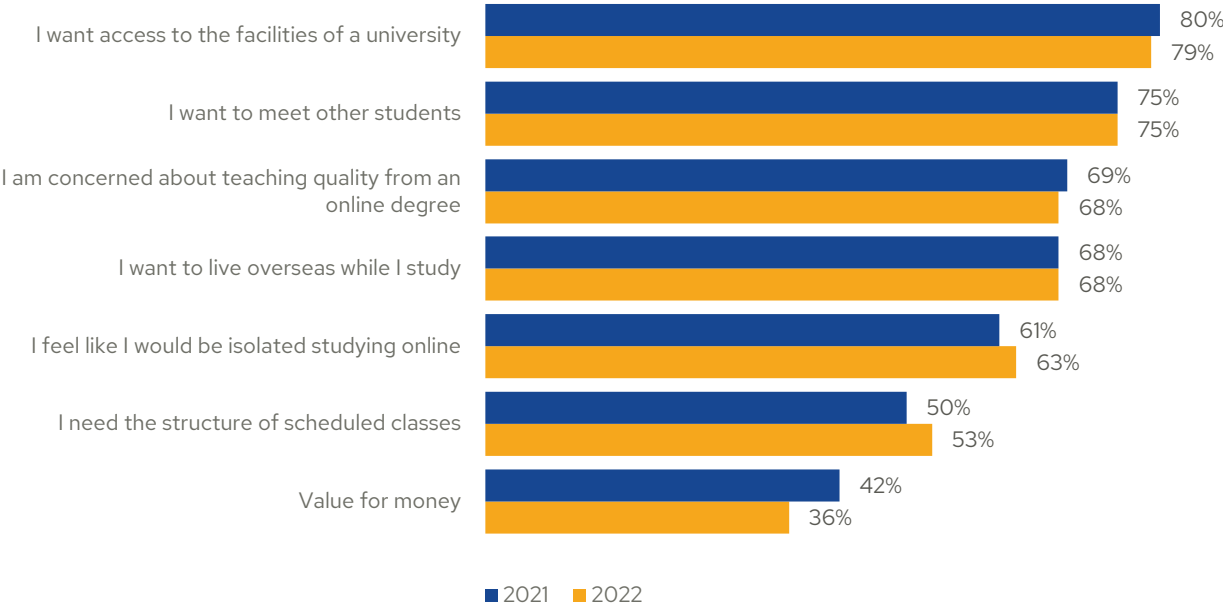
It is also worth noting that the lack of contact with fellow students in an online degree setting is seen as a prominent barrier by many candidates. It is important for students to have the opportunity to debate the subject matter in a 'live' setting as these experiences are perceived to be a key part of any university experience. Addressing this and providing a space for students to interact virtually could be a useful way of minimising some of the barriers associated with online learning.

The structure of scheduled classes is a barrier which has become notably more prominent in 2022, with 53% of candidates selecting this option, up from 50% in 2021. This is a likely effect of the pandemic, with many students taking classes online, or viewing recordings of lectures, rather than viewing them live. This removed many of the day-to-day structures of the traditional degree experience and the data here would suggest this impact was felt by many students at the time. It is likely this contributed to many feeling increasingly isolated during the pandemic and as a result, increasing numbers are aware of the benefits of having a daily structure in the form of live lectures, seminars and workshops.



Universities need to carefully target the perceived barriers of online learning which they can address in their communications. There are some inherent features of online learning which means it will never be considered a viable option for some student cohorts. The pandemic has shone a light on some of the limitations of online learning, therefore it is important that any attempts to promote this form of delivery are able to address these in a comprehensive and meaningful way.

### Why aren't you interested in studying for an online degree?

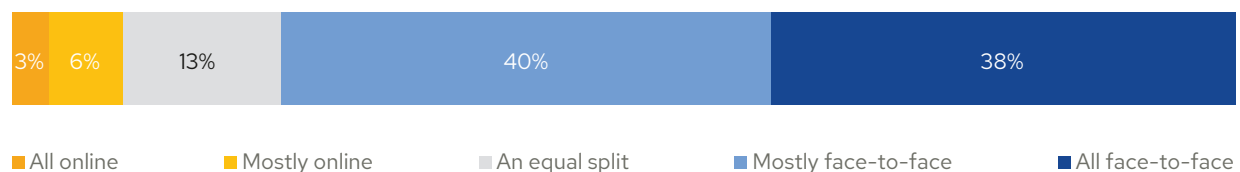


# What aspects of their degree do candidates regard as being most different in an online setting?

Whilst satisfaction towards the quality of online teaching remained high throughout the pandemic, there is still a demand amongst the next generation of students for a return to face-to-face teaching on-campus as soon as possible.

When asked how they expected to be taught when they begin their studies, over 78% of candidates expect their degrees to be taught predominantly in a face-to-face setting. Fewer than 10% expect online teaching to feature heavily in their studies which suggests that expectations are for a significant return to normality by the time the next enrolment begins. This reiterates the notion that attitudes towards online learning are not shifting as dramatically as had been expected, especially when combined with the trends identified previously with regards to interest in online and blended learning capabilities.

## How would you expect your preferred course to be taught when you begin your studies?



As a follow up to this, we can examine the views of prospective candidates towards specific aspects of the online learning experience. In doing so, we hope to demonstrate that there are certain areas which will need to continue to feature a face-to-face element if universities are to optimise the learning experience for the students. The results to this question suggest that interactions with other students and with teaching staff are seen to be significantly more limited in an online setting, which reiterates the notion that they see these interactions as a fundamental part of their university experience and of their studies.

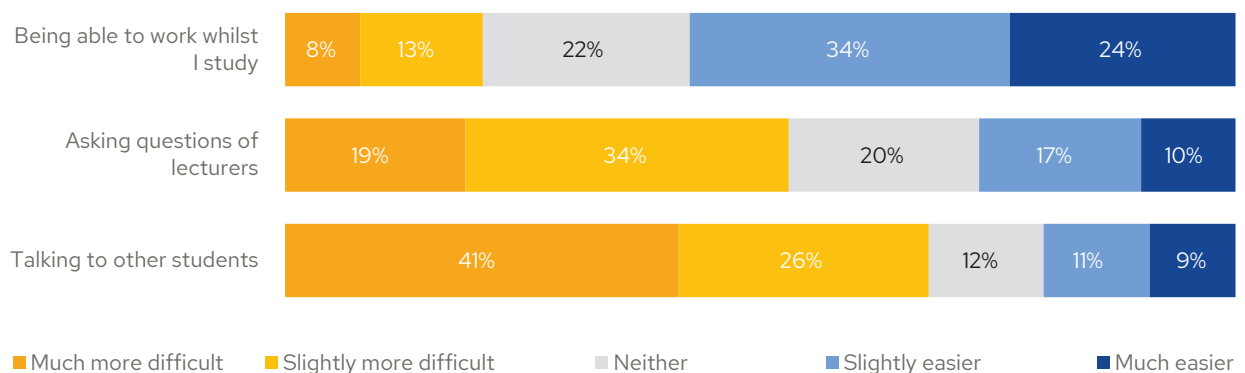
67% of all prospective candidates believe that interactions with other students are more difficult in an online setting. This reiterates the statistics seen earlier, which suggests that one of the more prominent barriers to online learning is that candidates do not have the option to meet with other students easily. It is important that universities are able to facilitate easy interactions between students and that they incorporate this element into their course structures in the future. The last 2 years have proven that virtual interactions are no substitute for face-to-face ones and this should be reflected in the student experience.



Furthermore, over half of all candidates also believe that asking questions of lecturers is more difficult in an online environment. It is equally important that universities ensure there are channels and processes in place to facilitate interactions between staff and students as this forms a vital part of their studies. It is also worth noting that a significant proportion of candidates believe that asking questions of lecturers becomes easier in a virtual environment. It may be worth offering the option for students to attend lectures either in-person or virtually, in recognition of the fact that different students have varying preferences when it comes to their studies.

By contrast, 58% of all candidates recognise that working whilst studying becomes significantly easier when studying virtually. This reflects the importance that many candidates place on having a greater degree of control over how they allocate their time and that online learning offers them the opportunity to work during their studies. When promoting the benefits of online study, focusing on the flexibility it affords students is one of the most effective elements to portray. As shown earlier, this is a more accessible and attractive benefit of studying online than any cost savings which might be made.

### Do you think the following aspects of studying online are easier or more difficult compared to on-campus learning?



The final element to consider here relates to the appeal of a hybrid learning approach. When asked about this, nearly half of all candidates found the notion to be either very or somewhat appealing. By contrast, nearly a third of all candidates find the idea unappealing instead.

This reiterates the findings seen earlier, which suggest that a purely online learning model is not regarded as a viable alternative by the vast majority of students, however a model which might combine online and in-person learning experiences would garner significantly greater appeal.

When asked to articulate why they would not find a hybrid learning approach to be effective, many of the responses focused on the need to access university facilities and study resources, whilst also focusing on the enhanced relationship between staff and students:

*“A subject must be learnt holistically - with the ability to make use of all facilities and types of equipment. Face-to-face learning opens up the opportunity to learn by experience and by trial and error. It improves the teacher-student relationship, letting them know more about us and thereby have more faith in us while assigning challenging responsibilities. Also, online education, or even hybrid education, removes the value of the expensive fees paid for the education that we consciously chose to study overseas.”*

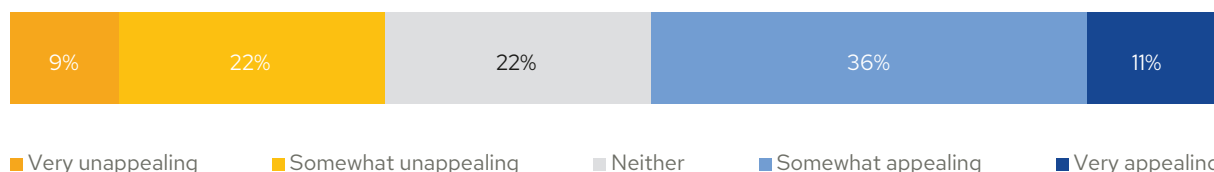
*“Being an international student, I am paying a really large amount to study. And I would want it to be utilised in gaining an actual understanding of the subject which only happens in-person and not online.”*

*“I love interacting with people. I love meeting my classmates, seeing my professors, talking to my professors after the class and asking them questions or seeking their guidance.”*

*“I feel like it’s important to be able to integrate with your peers and lecturers face to face. Especially during the first term, making connections and personally getting to know your peers who are in your classes will help to develop your social skills as well as skills with communication in class.”*



## How appealing do you find the idea of a hybrid learning experience, which combines virtual and on-campus teaching?



When seeking to promote online learning or hybrid learning structures, it is important that universities engage with students and have a realistic understanding of the elements of their degrees which could most effectively be replicated online. It is also equally important to acknowledge that many elements of the learning experience continue to require a face-to-face element. The interactions between staff and students are seen as crucial parts of a degree, which suggests that even in a hybrid learning model, there will need to be a renewed focus on allowing these interactions to take place.

## How many students are interested in student exchange programmes?

Student exchange programmes have become increasingly popular in the last 15 years, and this year marks the 30th anniversary of the European Union's student exchange programme: Erasmus. An array of student exchanges and international placements are now offered at universities globally, with increasing numbers now taking advantage of the opportunity to study abroad as part of their home degree.

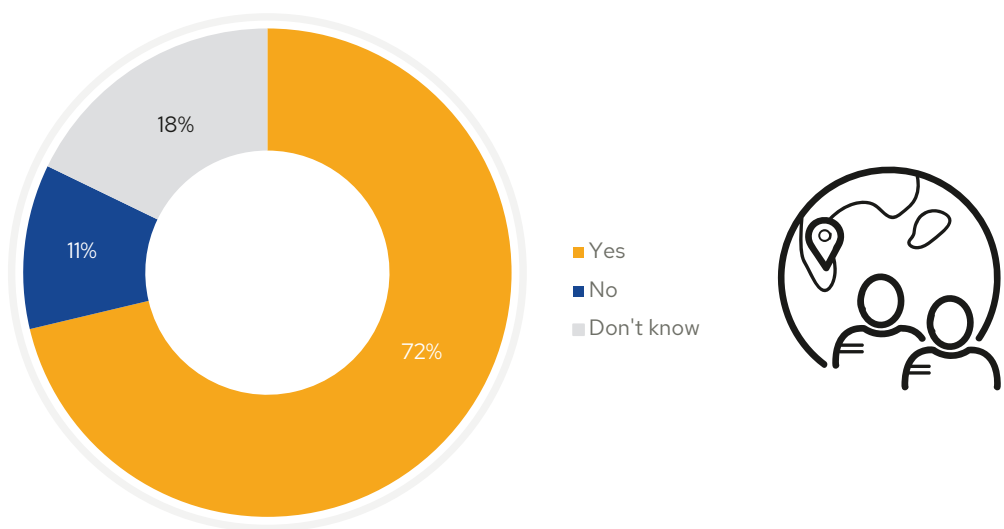
To gauge the relative popularity of these student exchange programmes amongst international candidates, we presented respondents with a short description, and asked whether they would be interested in taking part in one:

**A student exchange programme is an opportunity to spend a period of time (e.g. a semester or a summer) studying at one of your university's international partner institutions.**

Surprisingly, nearly three-quarters (72%) of international candidates claimed they would be interested in taking part in one. Whilst this is an international audience, which in all likelihood affects the end results, the fact that this presents a viable alternative to many candidates who would be interested in exploring this option, further reiterates their enduring popularity.

It is vital that universities are able to ensure they can offer a range of options to prospective international students to study at their institution, which goes beyond the full-time learning structure which is the basis for most international students. The data from this survey suggests that there is sufficient market potential for student exchange programmes as to warrant greater attention from universities. In offering a range of alternatives, they can more effectively engage with their international candidates and so build on their international partnerships in a more structured manner.

### Would you be interested in taking part in a student exchange programme as part of your studies?



As a follow up to this question, we also asked those candidates who would be interested in student exchange programmes, why this was the case.

The most popular perceived benefits were the potential to discover new cultures and communities and the ability to establish new friends and connections, with 69% and 64% of candidates selecting these options respectively. When asked about the appeal of student exchange programmes, the cultural enrichment aspects are a theme constantly referenced when candidates were asked to put their reasons into their own words:

*“Through exchange programmes, I can gain diverse knowledge and learn more from the experience. For example, I can experience the lifestyle and culture of different regions, so as to enrich my experience, which is helpful for life, study and future work.”*

Chinese candidate

*“Yes, I would love to. In my previous school we used to have student exchange programmes which were really amazing. They help us learn new culture, language, make new friends across the world. This, in turn, also helps us understand diversity and teaches us to respect other cultures”*

Indian candidate

Another key perceived benefit of student exchange programmes is that they allow candidates to improve their job prospects after they graduate. Graduate outcomes are a key consideration for candidates throughout their decision-making process, and it is clear that many regard the experience of studying abroad, albeit even for only part of their degree, to be a unique and attractive one, especially when considering potential employers:



*"It would be nice to try other universities and cultures, with different teachers and colleagues. If the country has a good reputation regarding my chosen career it would be nice to...If the country has a good reputation regarding my chosen career, it would be nice to have it on my CV as well."*

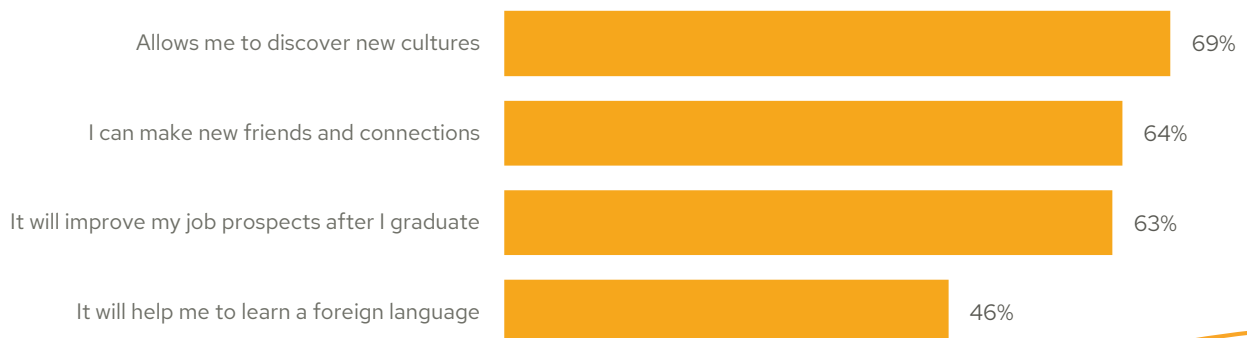
Brazilian candidate

*"Because it would allow me to travel while gaining new understanding about the field I am looking into for future employment - the added bonus of culture would be amazing."*

French candidate



### Which of the following are reasons for you being interested in a student exchange programme?



As a follow up, we also asked those candidates who weren't interested in student exchange programmes, why this was the case. The most notable barrier was simply that it isn't an option which they had considered, with 67% of candidates selecting this option. However, when analysing the open-ended responses to this question, the main reason for this related to the fact that for many postgraduate candidates, their studies overseas would only amount to one year, which they would like to spend solely in one country:

*"I will only be pursuing one year of a master's programme, so I would like to stay at my main university for it."*

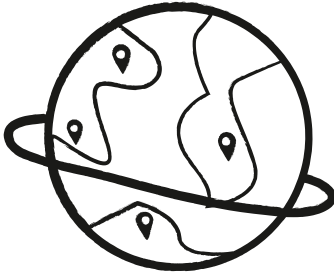
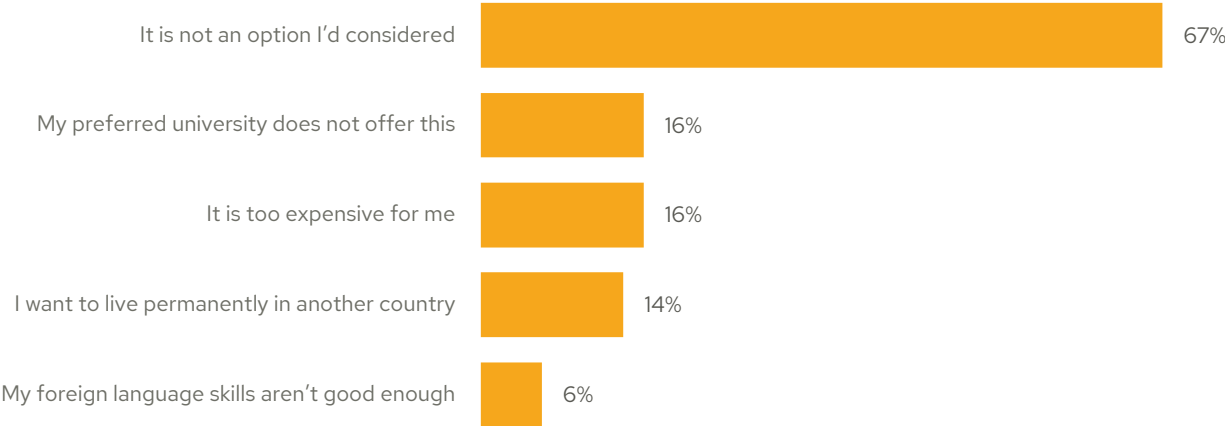
United States candidate

*"The one year master's programme is short. I worry the exchange student programme will impact learning and graduation time. Also, I may not be able to afford the expense."*

Taiwanese candidate

*"I consider myself to be a very rigid individual. Knowing that I will only be at a particular university for a limited period will deter me from establishing friends and adapting to the culture of the new environment because I know the experience will be short-lived."*

# Which of the following are reasons for you not being interested in a student exchange programme?



## In summary

The pandemic has provided an indication as to the perceived benefits and shortcomings of online learning. Universities must learn from this when considering the optimum way to incorporate virtual learning environments into their course structures. Students see the value of their degrees in their face-to-face interactions with teaching staff and other students, and any future hybrid learning model must take this into account.







# Key findings

**65%**

of candidates decide on the intake they want to apply for after deciding on their course, country and university

**29%**

of candidates fear that delays in processing their study visas will prevent them from enrolling in their preferred intake

**30%**

of candidates applying to a course with multiple intakes claim they were an important factor in their decision-making

**57%**

of candidates feel that the presence of multiple intakes on a course makes it seem like the university is trying to make it easier for students to enrol

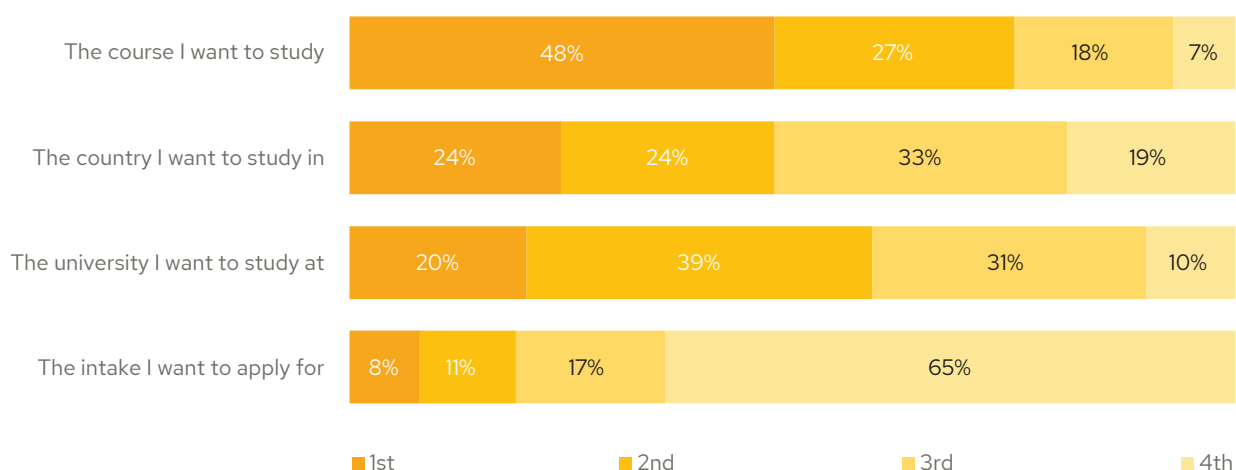
Whilst the majority of international students who enrol in the UK will do so in September, some universities will offer an additional intake in January, with others opting to offer up to 3 intakes for students throughout the year. It is clear that universities are divided on this issue, with some of the belief that having multiple intakes makes it easier for students to enrol with their institution, while others opt to avoid the logistical challenges that multiple intakes would bring.

In this section, we analyse the potential benefits for universities to offer multiple intakes by examining the student perspective, to see where this issue features in their decision-making. We conclude by highlighting its importance in their pre-enrolment journey and evaluate whether having multiple intakes creates a positive view of the institution. In doing so, we hope to help universities in their strategic planning for future intakes and student cohorts.

# What are the main barriers to candidates enrolling in their preferred intake?

Before considering the precise of introducing different intakes for candidates throughout the year, it is important to understand the order in which prospective students make decisions, as it allows universities to then target candidates with the appropriate messaging at the most relevant point in time.

## When making decisions about your studies, in which order do you consider the following?



The chart above gives an indication as to the order in which the majority of candidates will make their decisions. For nearly half of all candidates, the first thing they will decide on is the course they want to study. This consideration dominates all others in the early stages of their pre-enrolment journey, meaning that universities must quickly establish what course candidates are interested in studying, so that they can tailor their communications and demonstrate exactly how they excel in that particular area.

For nearly two-thirds of candidates, the intake they want to enrol in is the last element which they consider. This demonstrates that for many candidates, their main priorities are the course, country and university they study at and that the intake they enrol in is less of a priority for them.

Despite the fact that the intake represents the final stage of the decision-making process for many candidates, the vast majority of responses in our survey (84%) claimed to be planning on enrolling in September 2022. Only 4% were planning on enrolling in January 2023, with the remainder looking to enrol in September 2023 or later.

When asked what the perceived barriers were to them enrolling in their preferred intake, the most prominent one to emerge was restrictions on international travel. The timing of fieldwork is likely to be a significant factor here, as responses for the survey were collected between January and March 2022. As such, the lifting of all international restrictions in March for international arrivals in the UK can be viewed as positive perspective, as it removes one of the most prominent barriers for candidates.



Nevertheless, some significant barriers remain. Whilst cost considerations continue to be an issue for many candidates, there are also concerns around delays to processing their study visa. It is worth noting that many countries around the world are still struggling to process the backlog of applications that have built up during the course of the pandemic and that this is likely to have an impact for many candidates' aspirations with regards to their studies. It is vital that universities are able to give international candidates the necessary support and guidance required to allow them to progress through the application journey and to enrol in their preferred intake. Those institutions that do have the structures in place to provide additional support for candidates are likely to benefit most strongly.

### Are there any barriers which might prevent you from enrolling in your preferred intake?



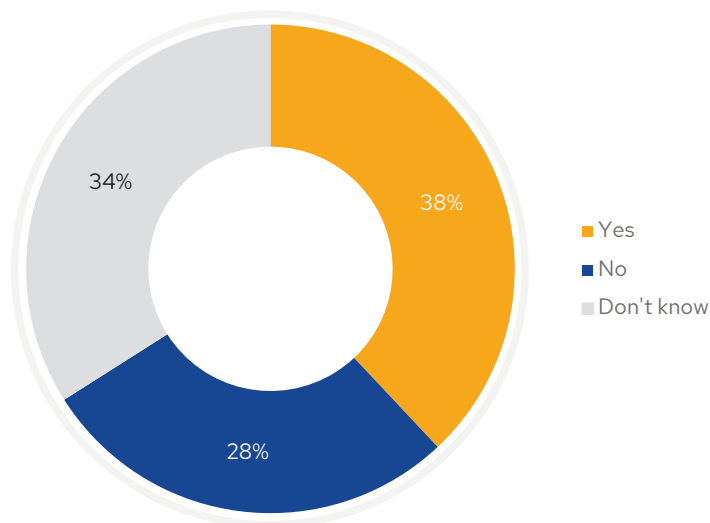
# How important is it that a course is able to offer multiple intakes throughout the year?

Whilst we have established that the intake is the final element of the candidate journey, it is important to further analyse the role of multiple intakes in their decision-making process to more thoroughly establish its importance and value to universities.

When asked about this, over a third of candidates claimed that their preferred course offered multiple intakes throughout the year. Whilst this may seem higher than many would have expected, it is worth noting that there are significant variations across different study levels. For undergraduate candidates, only 31% claimed to be looking to study a course which offered multiple intakes, whilst this figure rises to 44% for postgraduate candidates. This largely reflects the profile of course offerings from UK universities and suggests that the issue is likely to be far more prominent for postgraduate candidates than undergraduate.

It is also worth noting that over a third of candidates don't know whether their course offers multiple intakes, a figure which rises to 43% of undergraduate candidates. This likely reflects the fact that for many candidates, the intake is the last element of their studies which they consider, and that the focus for much of the pre-enrolment journey, is on the course, country and university they will study at, rather than when they will get to study there.

## Does your preferred course have multiple intakes throughout the academic year?

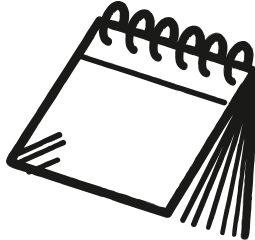
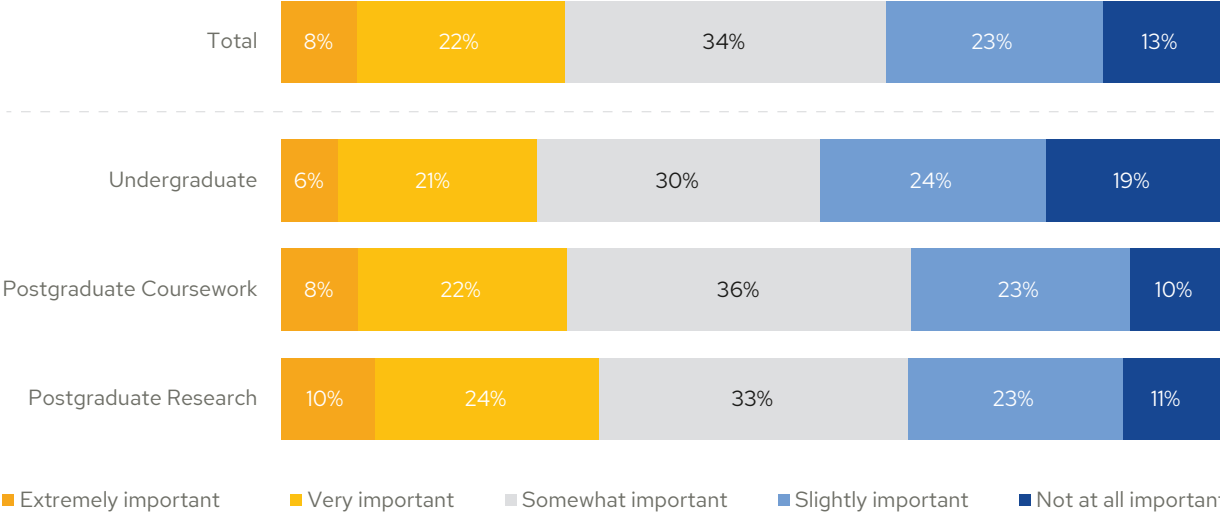


These trends are reiterated when we ask those candidates who are applying to courses with multiple intakes how important that element was in their decision-making. When asked about this, only a relative minority claimed it was an important factor in their decision to apply to that course, with 30% citing it as either extremely or very important.

It is important to note that there are significant variations in the results by the different study levels. 19% of undergraduate candidates claim that the option to apply for multiple intakes is not at all important, compared to only 10-11% of postgraduate candidates. Postgraduate candidates are also significantly more likely to claim that the option to have multiple intakes is extremely or very important in their decision-making.

This suggests that when universities consider the question of whether to offer multiple intakes to candidates, it needs to be considered in light of the programmes they offer at different study levels. Expanding the roster of courses which are available outside the main September enrolment cycle is likely to be far more impactful for postgraduate candidates than it is for undergraduate candidates.

### How important is it that your preferred course has multiple intakes?

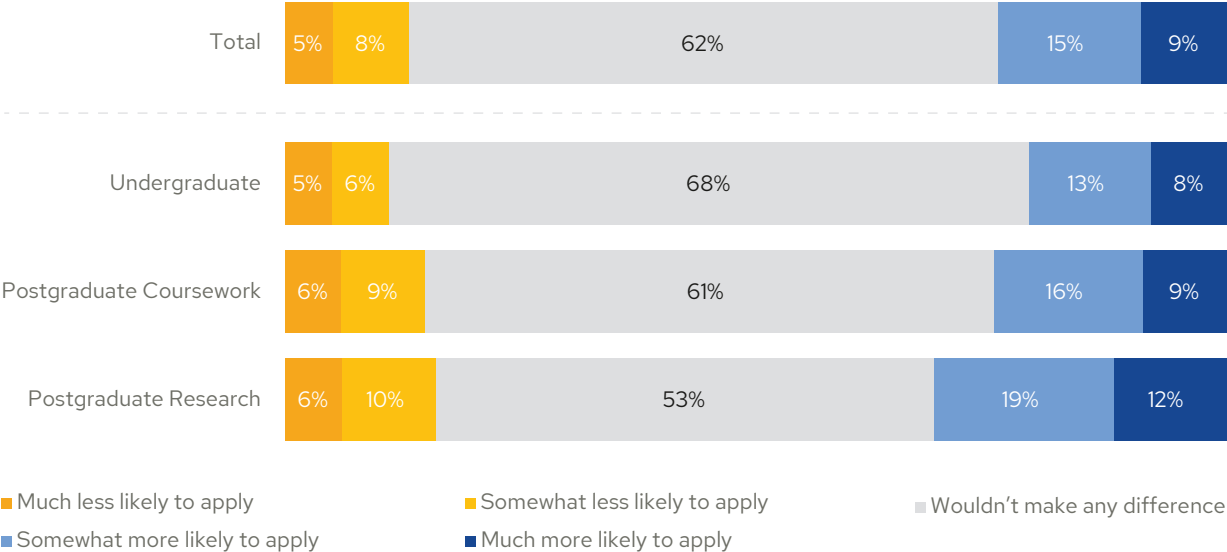


To build on this analysis, we can also ask those candidates who are applying for courses with only a single intake in the year, to see if the presence of multiple intakes would sway their decision-making. The chart below illustrates that for 62% of candidates, the option to apply for multiple intakes doesn't necessarily have any impact on the courses or universities they apply to.

However, as with other metrics, there are significant variations by study level which must be taken into account. For undergraduate candidates, 68% claim that the option to apply for multiple intakes has no impact whatsoever on their decision-making. Whilst for postgraduate candidates, 25% of coursework candidates would be more likely to apply to a course if it had multiple intakes, rising to 31% for research candidates.

Given these findings, the potential for multiple intakes to benefit universities is far stronger at a postgraduate study level than it is for undergraduate cohorts. Universities need to consider their options carefully when it comes to offering multiple intakes, as the logistical challenges may outweigh the perceived benefits for certain segments of their student population. The results from this survey suggest that universities have more to gain by offering multiple intakes only to their postgraduate candidates.

**If your preferred course had multiple intakes, would that affect how likely you would be to apply to that course?**



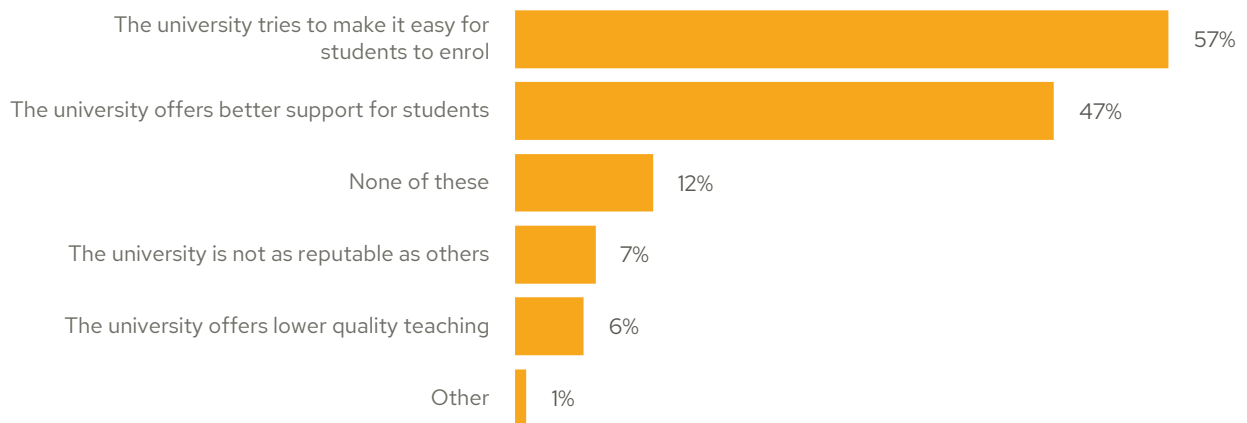
# How does the presence of multiple intakes affect candidates' perceptions of universities?

Whilst the presence of multiple intakes may not be a significant factor in many candidates decision-making, it can be useful to analyse how they impact perceptions of universities. When asked how the option to apply for multiple intakes affected their perceptions of a university, the most popular perception was that the university tries to make it easy for students to enrol, with 57% of candidates selecting this option. Closely related to this is the perception the university offers better support for students, with 47% selecting this option.

Only a relative minority of candidates believed the presence of multiple intakes to have negative connotations for a university, with 7% of the opinion it indicated a less reputable institution and 6% of the opinion it impacted teaching quality.

These trends apply across multiple candidate groups, with similar results recorded across different study levels and different subject areas. The relative positivity in the results in relation to multiple intakes suggests that students regard them as a useful element of their pre-enrolment journey, giving them multiple points in time for which to complete their application. Any suggestion that multiple intakes somehow negatively impacts perceptions of a university, or that they are the preserve of lower quality institutions, are unfounded, as even for candidates to Russell Group institutions, the results to this question are just as positive.

## If a course offered multiple intakes, what would that indicate about the university?



## In summary

Universities need to carefully consider which student cohorts are offered the option of applying to multiple intakes. Whilst the specific intake the candidate applies to may be somewhat less of a priority compared to the course, country and university they end up studying in, there is clear evidence this features more in the decision-making for postgraduate candidates. Whilst not a priority for many, the presence of multiple intakes is viewed positively and is seen to enhance relations between the institution and the candidate.







# Key findings

**59%**

of candidates would be more likely to consider the UK if it enhanced post-study work rights to allow graduates to remain for up to three years

**16%**

of candidates plan on remaining in the country of their studies for three or more years after they graduate

**57%**

of candidates claim that being able to learn new skills is the most important career consideration when choosing a course

Problem-solving, communication and teamwork are the most in-demand skills from employers

Three years ago, the length of time that international students could remain in the UK after completing their degree was raised from four months to two years. This change to the post-study work rights of international students was well received by the sector and backed up the Government's ambitions of enhancing the UK's attractiveness as a welcoming destination for international students. However, since then, many other countries have made further changes to their post-study work rights for international students. With this in mind, it is pertinent to re-visit this area, to see if further amendments are necessary for international students in the UK.

In this section, we analyse the potential benefits of raising the length of time that international students can remain in the UK from two to three years and look at how recent changes in this area have impacted candidate decision-making. To build on this, we will also evaluate the employment plans of candidates more generally and consider the characteristics they look for in a potential employer and the level of support they require from their university.

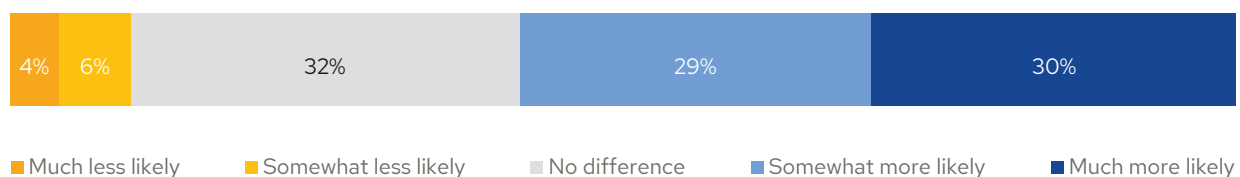
# What are prospective students' plans for remaining in the UK after they graduate?

The post-study work rights of international students vary considerably from country to country, and with such variance across the world, there is significant potential for these to affect prospective student decision-making. Whilst the most generous schemes in some countries allow graduates to remain for up to six years after completing their studies, the most strict regulations only allow a stay of up to two months.

To evaluate the potential impact of any changes to post-study work rights, we asked candidates how they would feel about a further extension to the amount of time they could remain in the country on a post-study work visa in the UK. When asked whether increasing the amount of time they could stay to three years would impact their consideration, 30% claimed to be 'much more' likely to consider the UK and an additional 29% were 'somewhat more' likely. This reiterates the notion that post-study work rights have the potential to impact the decision-making process for significant numbers of candidates and that the severity of restrictions placed on international graduates directly correlates to how welcoming that country is perceived to be.

It is important to highlight the changes that other countries have made to their post-study work rights in a bid to make themselves more attractive to international students. In Australia for example, which accepts similar numbers of international students to the UK, they now offer up to four years of post-study work rights<sup>4</sup>. This reinforces the importance of the UK maintaining its position as a welcoming destination for international students, by ensuring its post-study work rights are in line with those of its global competitors.

**If the UK increased the time that international students could remain in the country after they graduate from two to three years, would that change how likely you would be to consider the UK?**



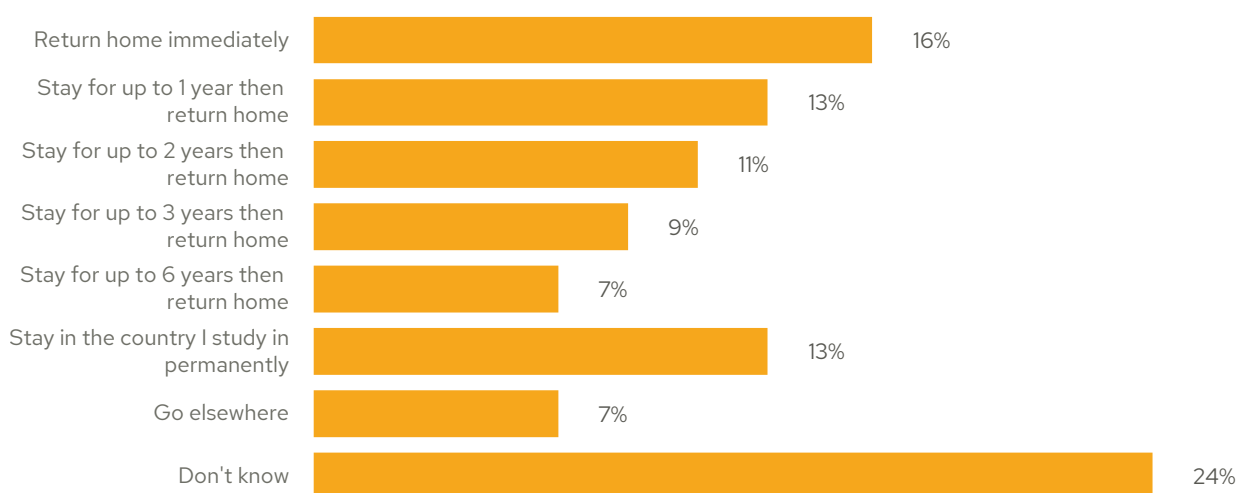
To follow up on this, it is perhaps most useful to examine whether prospective international students plan to return to their home country after they graduate. The results to this question demonstrate that candidates are largely divided in their post-study intentions. A relative minority of 16% claim to want to return home immediately, whilst a significant 40% claim to want to remain in the country for a limited period of time before returning home. It is worth noting that within this group, 16% would consider remaining for at least three years before returning home, which reiterates the value of raising the length of time that international graduates can remain up to three years.

To give greater context to these numbers, it is perhaps useful to compare these results to previous years. In 2021, 44% of candidates claimed to want to remain in the country of their studies temporarily, of which 20% were planning on remaining for longer than two years. The proportion of those interested in remaining in the country temporarily has fallen in the last 12 months, driven by a reduction in those who would like to remain for longer than three years. Given these results, it is perhaps more relevant now than ever to consider increasing the amount of time that international graduates can remain in the UK after they complete their studies, in order for it to remain internationally competitive in the global higher education market.

Only a minority of 13% plan on remaining indefinitely after completing their studies. Whilst there is conflicting data on the number of international students who remain indefinitely and greater uncertainty around the numbers who overstay their visa, the data from this survey suggests that the intentions of prospective students are less oriented around remaining permanently than other studies would imply.

It is also worth noting that a significant proportion of candidates (24%) don't know what their post-study plans are. It is important that this audience are aware of the range of options available to them after they graduate, and that post-study restrictions and regulations do not hinder their ability to determine their future career path.

### Do you expect to return to your home country after completing your course?



# What do prospective students consider when choosing a potential employer?

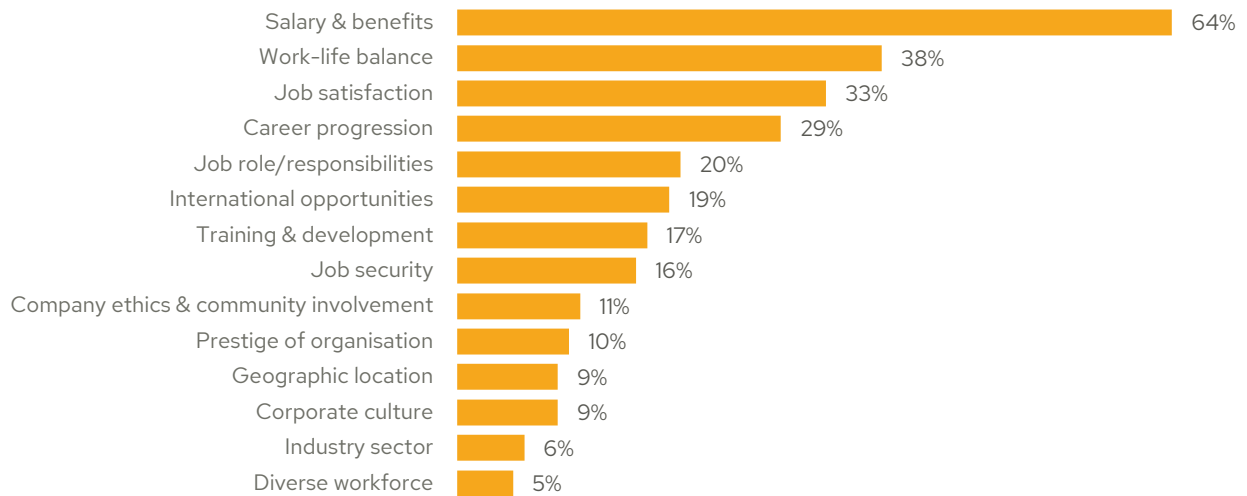
For many candidates, a course leading to their chosen career is one of the primary considerations when making decisions about their studies. We can conclude this section by looking at which aspects of a job are most important to prospective students when they are considering future employment. In doing so we hope to show universities how they can best support their student cohorts and guide them as to the employers they should be partnering with.

When choosing an employer, perhaps unsurprisingly, salary and benefits emerged as the most important priority, with 64% of all candidates selecting this option. It is important that universities and employers alike appreciate the extent to which this determines candidate decision-making and that most prospective students are well informed as to what they can expect to earn in their first year of employment. In helping to educate their students, universities will ensure that graduates have a more comprehensive view of the value their degree can bring in the short term, whilst also giving them a more realistic appreciation of what constitutes a 'good' salary to them.

It is also worth noting the importance of a good work-life balance, with 38% of candidates selecting this option. This has increased from 33% in 2021 and only 30% in 2020, which would suggest that the next generation of students are increasingly aware of the detrimental impact an imbalanced work-life structure can have on their mental health and of the dangers of burnout in relation to their employment. Those employers who can demonstrate a pragmatic attitude with regards to the work-life balance of their employees will find it easier to attract high-quality international university graduates.

Other factors to emerge as being important are job satisfaction and career progression. This demonstrates the need for employers to be able to communicate the ways in which graduates can progress within their organisation and that employer satisfaction is high. Those employers who can demonstrate a clear job role for graduates will benefit the most.

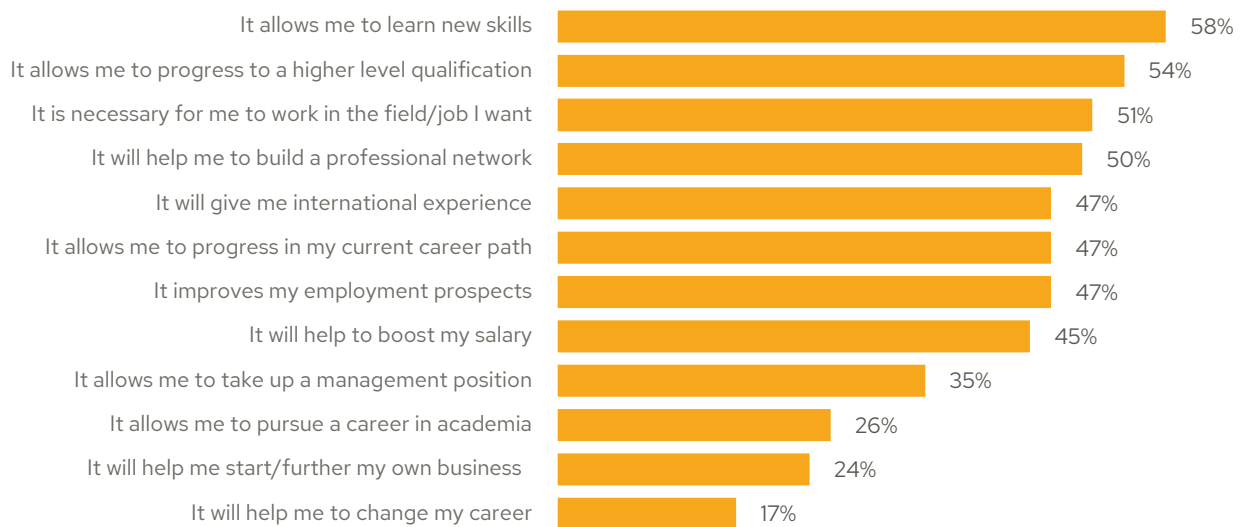
## Please select up to three factors you consider when choosing an employer



We can also elaborate on the topic further, by analysing what candidates' primary career considerations are when it comes to choosing a course. The most important consideration for this audience was that their course allows them to learn new skills, with 58% selecting this option. This demonstrates that upskilling is a vital part of the university experience for many students and that they are thinking how their time at university will make them more attractive to employers. It is vital that universities equip their graduates with the necessary tools that allow their students to articulate how the skills they have gained at university can help potential employers.

It is also worth mentioning that over half of all international candidates see their upcoming degree as a stepping stone for them to progress to a higher-level qualification. It is important that universities are helping their prospective students to plan their journey through higher education. Ensuring that this audience are equipped with all the necessary information so that they can make informed decisions about their studies is vital for universities.

## Thinking about your future career, what considerations are most important to you when choosing a course?

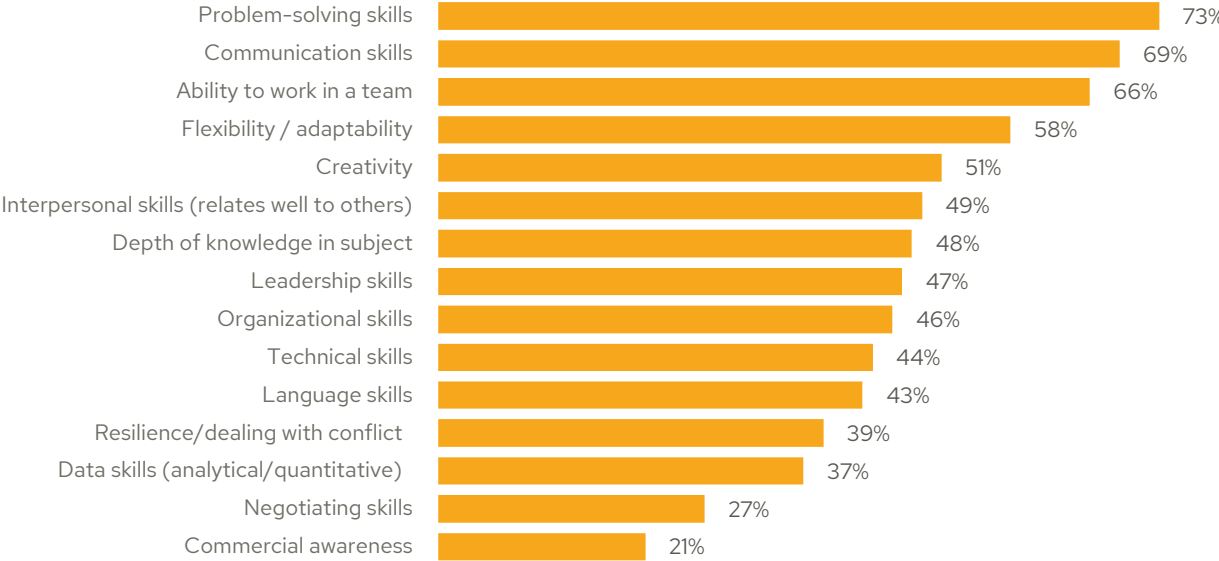


Now that we have identified upskilling as a vitally important consideration for most prospective students, it can be useful to focus on specifically which skills they think employers value most highly. In highlighting these, we hope to provide universities with a more comprehensive framework for how to adapt their course structures and help career services within universities to support their students and graduates to find employment.

When asked about this, the skills perceived to be of the greatest use to employers were problem solving, the ability to work in a team and communication. For prospective students, these skills are indicative of the type of graduate-level roles and types of jobs within the professional services sector which so many aspire to. It is vital that universities take note of these and educate their students on how their chosen degrees can equip them with these skills, to help them in the careers they are pursuing.

The importance this audience places on finding the right career after they graduate should be reflected in the way in which universities communicate with their prospective students via their marketing communications. By helping to guide current and prospective students in this regard and assisting them in planning for their lives after graduation, career-planning offices can add value to their degrees. The most effective way for them to do this is to emphasise the skills their graduates have gained from studying at that university and to help their graduates articulate how these skills can help potential employers when attempting to find work.

### What skills do you think employers value most in new graduates?





## In summary

Universities are being increasingly challenged to support their student populations to find employment. To better support their student cohorts requires coordinated action from multiple stakeholders across the industry. Ensuring that the UK's post-study work rights are in line with those of other countries that host large numbers of international students is going to be crucial in maintaining the country's status as a welcoming destination. Likewise, universities need to enhance their career-support services to help their graduates find appropriate employment after they have finished their studies.





# Key findings

## High quality teaching

a welcoming destination for international students, a good reputation at a subject level and the availability of scholarships are all important factors to key student markets

## The cost of living

student safety and worries over getting a job after graduating are all significant sources of concern for prospective students from these markets

## Information about teaching staff and work placements

as well as information about student accommodation and updates on channels to connect current and prospective students, are all valued marketing communications for candidates from priority markets for the UK

In the 2020-2021 academic year, nearly 100,000 first year Chinese students enrolled at UK universities. Whilst an impressively high figure, this represents a 5% decline on the previous academic year (the first time since 2007/2008 that a decline has been registered)<sup>5</sup>. For many, not only does this serve as a testament to the strength of the sector internationally and the high-quality teaching it is able to deliver, it also serves as a reminder of a potentially high-risk strategy for the sector, with its overreliance on a single market.

Meanwhile, enrolments from the EU and India both grew in 2020-2021, and in India's case, enrolments have more than quadrupled since 2017-2018<sup>6</sup>. It is clear then that the sector stands to benefit hugely from developing partnerships in other territories to ensure they can grow sustainably in the longer term.

**The International Education Strategy Update published in February 2021 set out a number of priority markets for the sector, and brought in International Education Champion, Sir Steve Smith, to target their efforts<sup>7</sup>. Whilst there are a number of countries and territories to focus on, some of the most important include:**

**China**

**India**

**Indonesia**

**Nigeria**

**Saudi Arabia**

**Vietnam**

# What are their most important priorities when choosing a university?



**China:** Whilst the quality of teaching is the most important factor overall, it is noteworthy that a university's ranking and its reputation, both at an overall and at a subject level, continue to be significantly more important to Chinese candidates than their counterparts in other locations. Our research has shown that ranking and reputation are closely interlinked in the minds of prospective students and in communicating a strong ranking, universities can communicate a strong reputation as well.

**Indonesia:** The availability of scholarships continues to be a significant factor for Indonesian candidates when choosing a university. However, it is almost as important to be able to demonstrate a welcoming environment for international students. As we have already seen, 86% of Indonesian candidates consider the UK to be a safe destination for international students. This gives UK institutions a further positive element to their marketing strategies when considering this audience.

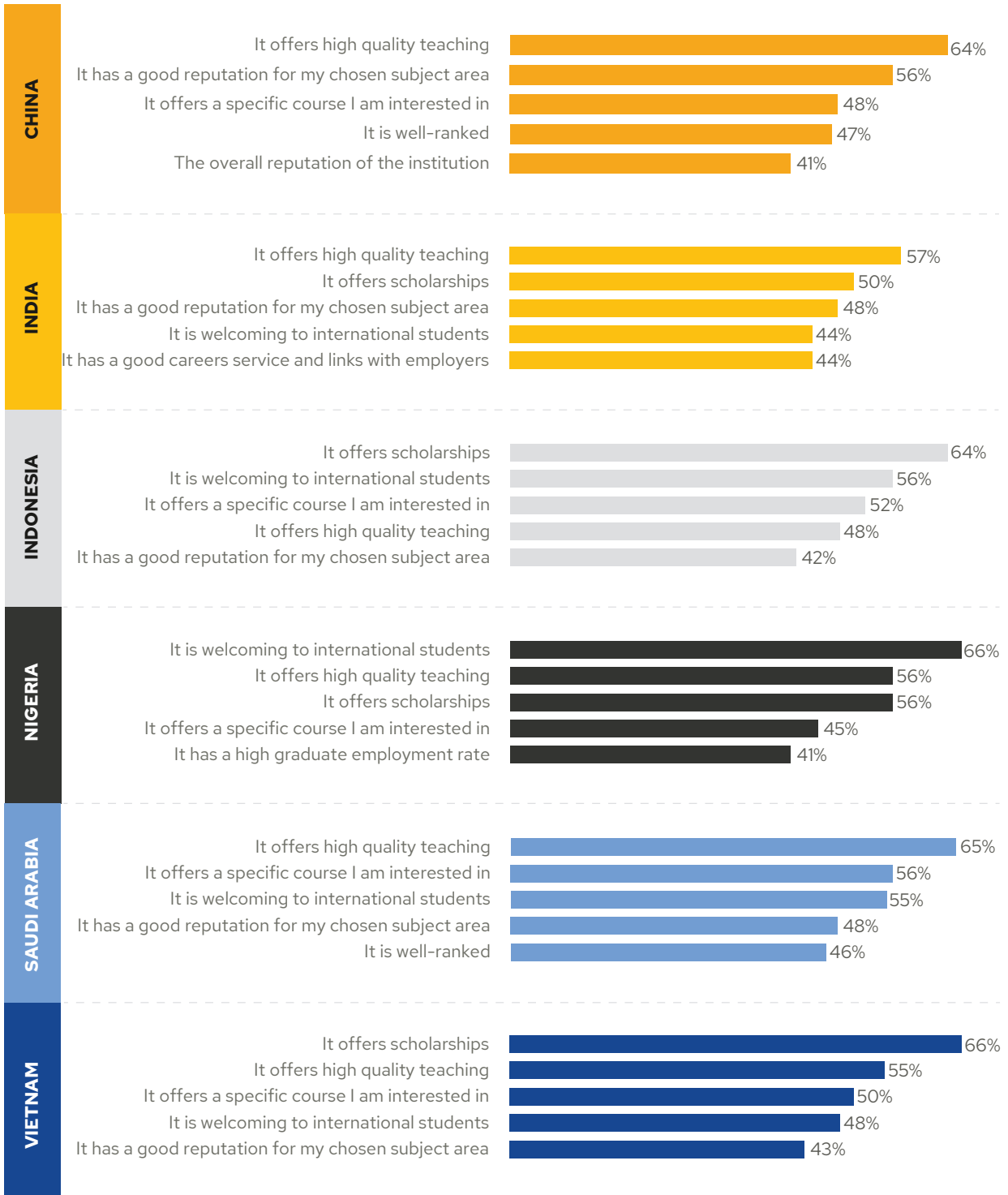
**Saudi Arabia:** The quality of teaching is increasingly the focus on Saudi Arabian candidates, increasing from 56% in 2020 to 65% in 2022). It is vital that UK institutions are able to communicate their teaching credentials by demonstrating their performance in global rankings of universities and by communicating the quality of their teaching staff. The university offering a specific course they are interested in is increasingly the focus for candidates, possibly reflecting a more targeted approach to their decision-making compared to recent years.

**India:** The quality of teaching is the most important factor overall, alongside the availability of scholarships. However, it is also worth noting that the graduate employment rate and the effectiveness of the institution's career support service are both significantly more important to Indian candidates than to those in other locations. Graduate outcomes form a vital consideration point in the decision-making process; therefore the UK's post-study work rights are a central element when considering its viability as a study destination.

**Nigeria:** For Nigerian prospective students, the country being welcoming is the most important factor. Whilst most Nigerian prospects regard the UK positively in this aspect, they will also be drawn by the size and depth of international student communities within an institution. Furthermore, a university's graduate employment rate is increasingly important to candidates from Nigeria (reaching 41%, up from 36% in 2020), which reflects an increasing focus on graduate outcomes and employment prospects.

**Vietnam:** The availability of scholarships is of the utmost importance to Vietnamese candidates, increasing from 55% in 2021 to 66% in 2022, therefore communicating a range of financial support options is crucial for UK institutions when communicating with prospects from this region. A welcoming environment is also increasingly important to this audience, therefore once again, the fact that 84% of candidates view the UK as a safe destination for international students provides a positive angle for UK institutions in their marketing strategies.





# What are their biggest concerns about studying overseas?



**China:** Safety is the most prominent concern for Chinese candidates and as we have seen already, this audience are more likely to think of the UK as being unsafe for international students owing to specific incidences of violence and discrimination. It is important that any additional initiatives which focus on student safety should be communicated upfront in order to alleviate some of these concerns. Academic pressures are a significant secondary source of worry, so any additional support services are most likely to resonate with this group.

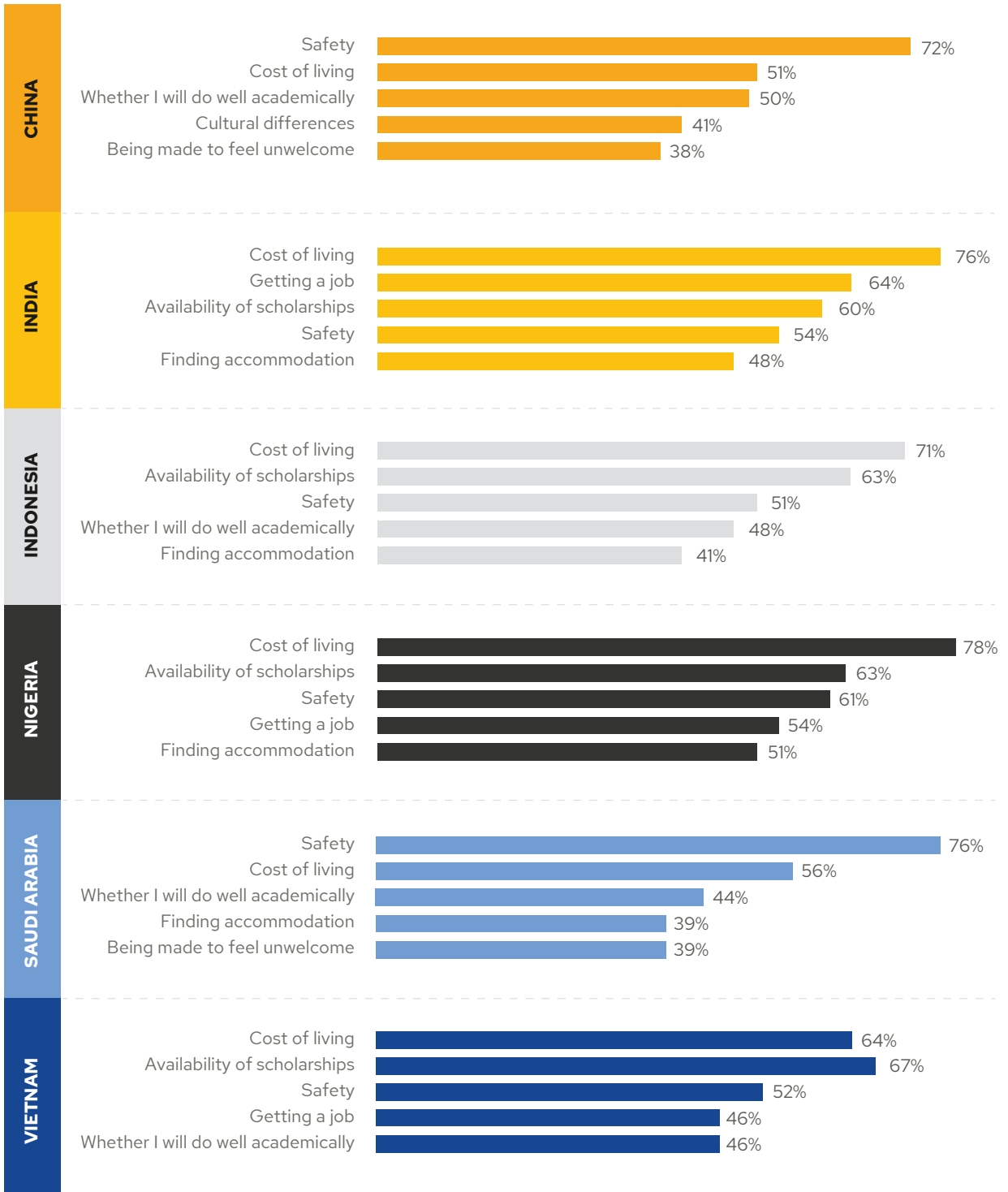
**India:** Cost of living is the main driver of concern for Indian candidates, however, getting a job is also a significant source of concern for them. We have also seen the importance of a high graduate-employment rate when choosing a university, so it may be unsurprising to see concerns about getting a job also emerging here. By communicating employment opportunities, both during and after their studies, universities can help to alleviate concerns of Indian candidates.

**Indonesia:** Indonesian candidates are also similarly concerned by the financial aspects of studying overseas. The cost of living and availability of scholarships are both key sources of concern for them. Therefore, universities should attempt to communicate a range of financial support options if they are available. Encouragingly, the issue of student safety, whilst still somewhat of a concern for this audience, is significantly less of a worry compared to 2021 and reiterates the notion that the UK is increasingly seen as a safe destination for international students.

**Nigeria:** Similarly, cost concerns are a significant source of worry for Nigerian candidates. By providing an accurate picture of the quality of life they can expect as a student, universities can address some of these concerns and reassure them that their standard of living will still meet certain expectations they might have.

**Saudi Arabia:** Safety and finding accommodation are significantly greater sources of concern for Saudi Arabian candidates than those from other countries. Any additional initiatives which focus on safety and student accommodation should be communicated upfront. Additionally, whilst the cost of living remains a prominent concern, it has declined significantly, from 74% in 2020, to 69% in 2021 and 56% in 2022. This reflects the burgeoning middle-class group in the country and reinforces the notion that the UK is increasingly seen as a cost-effective destination.

**Vietnam:** As with other markets, financial concerns are most prominent for Vietnamese candidates. However, it is also worth mentioning that concerns around safety are especially pronounced amongst candidates from this country, albeit markedly less so compared to 2021, falling from 58% then to 52% now.





# What information do they want from universities?



**China:** Candidates from China most desire information about teaching staff experience and qualifications, as they are seen as a principal component of the teaching quality administered in any given institution. In addition to this, stories about current and former international students are also highly valued as the anecdotal evidence they provide are seen as a key indicator as to how welcoming any institution is for international students. Peer-to-peer recommendations will be more highly valued than anything communicated via the institution itself for this audience.

**India:** Information on work placements and links to industry are most highly valued by Indian candidates. This ties in with their priorities when choosing a university and reflects the importance of graduate outcomes to this group more generally. Communicating the availability of work placements both during and after their studies will resonate most strongly amongst this group as they are increasingly looking for experiential learning opportunities so that when they come to apply for full-time roles, they are equipped with the necessary experience.

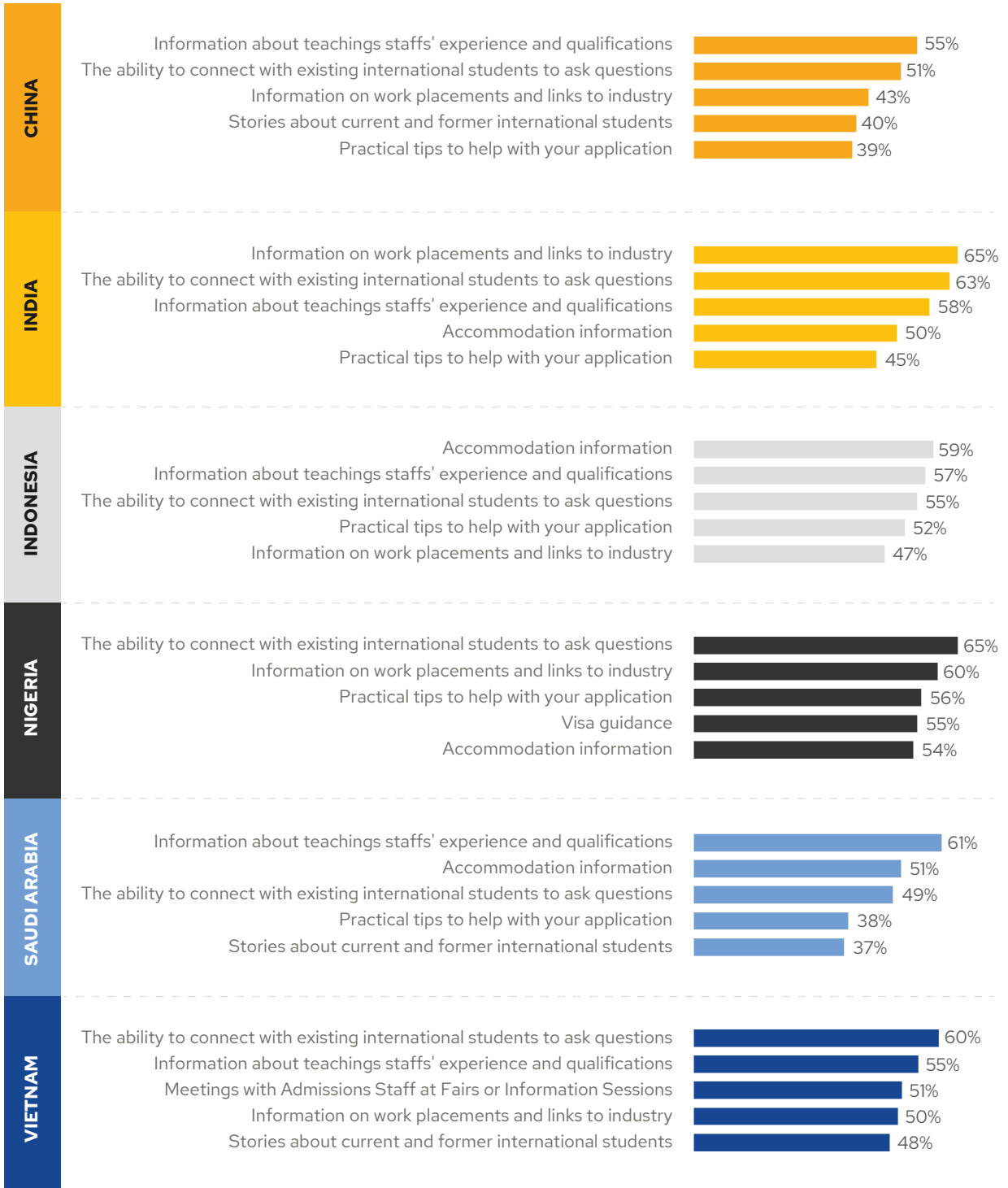


**Indonesia:** Information surrounding accommodation is most highly sought after by Indonesian candidates. This may be unsurprising given the heightened levels of scrutiny on student halls of residence over the last two years. However, it is important to note that these candidates want to be reassured that universities are investing in this area and ensuring a certain quality of life for their students. They are also focused on having practical tips which will help to optimise their application to university and guidance on what selectors will be prioritising themselves.

**Nigeria:** The ability to connect with existing international students is the most valued topic by Nigerian candidates. Our research has indicated that when it comes to peer-to-peer interactions, these tend to focus on the more informal areas of campus life, such as the social activities and social environment of a university. These areas are where the opinion of a staff member within a university may not be valued as much as one of their peers and so are more highly sought after. In addition, visa guidance can also be very valuable to this audience, who require more assistance in the pre-enrolment stage of their journey.

**Saudi Arabia:** Saudi Arabian candidates also value information about teaching staff experience and qualifications. Since they are so crucial to their university experience and in maximising engagement with the course content, it is unsurprising to see them so valued by this group. Ensuring that lecturer profiles are up to date and easily accessible is crucial for this audience. Other areas of importance are accommodation information and the ability to connect with existing international students.

**Vietnam:** Whilst Vietnamese candidates also value the ability to connect with existing students and information about teaching staff, where they are unique is in the heightened importance they attribute to the value of meeting admissions staff at information sessions or fairs. They regard these fairs as one of the most useful information sources available to them, as the opportunity to speak directly with these admissions staff and to ask questions is regarded as a fundamental part of their pre-enrolment journey.



# In summary

The UK higher education sector has benefited hugely from its international recruitment efforts in recent years. In the future, it is vital that the sector is able to identify and build partnerships with markets where there is significant potential to increase international student recruitment numbers. In order to expand into these markets, UK institutions will need to be able to develop tailored strategies, to reflect the diverse and varying portfolio of priorities, concerns and needs of prospective students situated there.



# Conclusion

The coronavirus pandemic highlighted a number of key challenges which the UK higher education sector must meet in order to build its resilience. Not only have institutions already proven they can adapt effectively (as the last two years has shown), but there are also indications that the sector is well equipped to meet these future challenges as well.

Improving their mental health support for students, incorporating hybrid learning models without leading to a detrimental impact on student health and communicating

their environmental sustainability impact credentials are all areas which universities need to invest in.

Universities can leverage some of these benefits to aid their recruitment efforts for the academic year ahead. Through cooperation with multiple stakeholders from across the sector, they can create an environment which is truly welcoming to international students, one which provides them with multiple options after they graduate.

1 There has been a renewed focus on graduate outcomes for international students. Universities must coordinate with other stakeholders to convince the government to raise the amount of time that international graduates can remain in the country from two to three years.

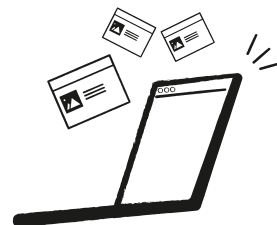
2 Communicating their environmental impact credentials will become increasingly important for universities. Many candidates agree that universities have a responsibility, and could be doing more to be environmentally sustainable, so committing to actionable changes is crucial for universities

3 With the recently updated International Education Strategy identifying new markets for potential growth, it is vital that universities develop tailored recruitment strategies for these countries to effectively recruit international students.

4 As we emerge from the pandemic, it is clear that many candidates prefer a full transition back to face-to-face learning. Moving forward, universities will need to learn from their recent experiences and enhance their online teaching practices to allow greater interactivity between staff and students.

5 The option to apply for multiple intakes throughout the year is a crucial one for selected student cohorts (in most cases for postgraduate candidates). Universities that don't offer multiple intakes on some courses should reconsider their approach to boost their appeal so students can enrol throughout the academic year.

# Endnotes



1

<https://www.hesa.ac.uk/data-and-analysis/students/where-from>

2

<https://www.hepi.ac.uk/2021/09/09/international-students-are-worth-28-8-billion-to-the-uk/#:~:text=New%20analysis%20shows%20that%20just,billion%20to%20the%20UK%20economy>

3

<https://www.gs.com/portfolio-items/sustainability-in-higher-education-what-more-can-universities-do/>

4

[https://www.crizac.co.uk/index.php?route=pavblog/blog&blog\\_id=157](https://www.crizac.co.uk/index.php?route=pavblog/blog&blog_id=157)

5

<https://www.hesa.ac.uk/data-and-analysis/students/where-from>

6

<https://www.hesa.ac.uk/data-and-analysis/students/where-from>

7

<https://www.gov.uk/government/publications/international-education-strategy-2021-update/international-education-strategy-2021-update-supporting-recovery-driving-growth>



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