STUDY UK
PROSPECTIVE INTERNATIONAL STUDENT RESEARCH FINDINGS

THE BEST POSSIBLE YOU MADE POSSIBLE IN THE UK.

STUDY UK

BRITISH COUNCIL
GREAT BRITAIN & NORTHERN IRELAND
CONTENTS

• Introduction to 2CV
• Methodology
• Consideration of the UK and the impact of the pandemic
• The impact of Brexit
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• The role of parents (China and India only)
• Key take outs
2CV is an award winning consumer insights agency with offices in the UK, USA, and Singapore.

Our work spans three main areas: Social, Technology & Entertainment and Lifestyle. This means we work across a variety of sectors, including Education, Youth, Transport, Health, Gaming, Retail, Beauty and Fashion.

We don’t specialise in any one sector - we are specialists in research. Our team includes experts in digital research, behavioural science, advanced analytics and design.

We were established in 1989. We now have over 100 members of staff, and our research spans the globe - we have conducted research in over 60 countries!

2CV have worked with the British Council to understand international students’ attitudes towards studying in the UK for the last three years.
METHODOLOGY

• Online survey, carried out in March 2021
• All respondents had to be considering studying abroad in an English-speaking country in the next three years (mix of UG and PG students)
• Conducted in 6 markets, n=300 students per country
• The research also included n=100 parents in China and India
• Tracking study – now in its third year

China
India
Malaysia
Thailand
Indonesia
Pakistan
CONSIDERATION OF THE UK AND THE IMPACT OF THE PANDEMIC
THE MEDIUM-TERM APPETITE TO STUDY ABROAD (IN THE NEXT THREE YEARS) HAS NOT BEEN IMPACTED BY COVID

Among 16–34-year-olds

Considering studying ONLINE for a degree awarded by a university based in an English-speaking market

2020: 47%
2021: 53%
Change in 2021: +6%

Considering studying abroad in an English-speaking market

2020: 26%
2021: 26%
Change in 2021: =

Considering study in the UK

2020: 15%
2021: 14%
Change in 2021: -1%

DATA SHOWN AT A TOTAL LEVEL ACROSS THE 6 MARKETS RESEARCHED
Sizing Sample 2021 (3219) China (534) India (544) Malaysia (542) Thailand (542) Indonesia (544) Pakistan (513)

Do either of the following statements apply to you? 54. If you had the choice of studying for an international degree without any restrictions, from which countries other than your own would you prefer to obtain a higher education degree / qualification?
HOWEVER, IMMEDIATE PLANS ARE IMPACTED FOR ALMOST EVERYONE – WITH DELAY THE MOST COMMON OUTCOME

Current study abroad plans, taking into account the Covid-19 pandemic

17% Switching Market
15% Delayed a decision on where to study until pandemic has resolved
13% Deferral
13% Online Degree
11% TNE
8% Home Study
7% EMI

Delay or Deferral = 28%

14% are reconsidering whether to go to Uni or value of Higher education

Only 6% say Covid-19 has not impacted my study abroad plans

Base: Wave 3 2021:1925 (All Markets) CN (290), IN (332), MY (325), TH (320) IO (330) PK (328) P2. Which, if any, of the following statements BEST describes your current study abroad plans, taking into account the Covid-19 pandemic? Results show the most likely option (either confirmed or still exploring)
## STUDENTS SAY COVID-19 MAKES STUDY ABROAD FEEL RISKY AND A COMPROMISE

Why has Covid-19 impacted overall study abroad plans? (Open text response)

<table>
<thead>
<tr>
<th>Restricted movement</th>
<th>Economy and Jobs</th>
<th>Health</th>
<th>University experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>‘I have heard Australia have cancelled all visas including students so it becomes difficult for you to consider it’</td>
<td>‘Covid has reduced my income level and savings. This will be burdensome and a struggle if I insist to study abroad now’</td>
<td>‘Virus out of control, as well as the risks’</td>
<td>‘The visa terms and ease of obtaining it has become tough now and several foreign universities have restructured their entire module.’</td>
</tr>
<tr>
<td>‘I’ve stopped thinking of it since travelling aboard seems not promising in the upcoming months.’</td>
<td>‘It affected my income so I didn’t have enough money to study abroad’</td>
<td>‘Learning is precious, life is even more’</td>
<td>‘If because of Covid it’s 90% online learning, it is difficult to understand all the teaching’</td>
</tr>
<tr>
<td>‘Malaysian authorities banned international travel. My parents are not allowing me to leave the country due to fear of catching virus.’</td>
<td>‘Due to Covid my father lost his job. Now he has a job again but it will take time to collect money for abroad study’</td>
<td>‘Very disturbing and fear of contracting Covid-19’</td>
<td>‘Most institutions are giving Online Classes. I want to be able to socially interact and make friends on campus.’</td>
</tr>
</tbody>
</table>

Base: Wave 3 2021:1925 (All Markets) CN (290), IN (332), MY (325), TH (320) IO (330) PK (328) P3 - What are the main reasons that the Covid-19 pandemic has impacted your overall study abroad plans?
## Important factors when considering where to study abroad – 8-10 Scores, Ranked

<table>
<thead>
<tr>
<th>Factor</th>
<th>Score</th>
<th>YoY Change in Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality/innovation/the course I want</td>
<td>84%</td>
<td>-1%</td>
</tr>
<tr>
<td>Cost</td>
<td>84%</td>
<td>0%</td>
</tr>
<tr>
<td>Impact on future employability</td>
<td>83%</td>
<td>0%</td>
</tr>
<tr>
<td>Living requirements (e.g. visa, accommodation)</td>
<td>80%</td>
<td>-1%</td>
</tr>
<tr>
<td>Appealing daily life and culture</td>
<td>79%</td>
<td>-2%</td>
</tr>
<tr>
<td>Safety &amp; flexibility in face of Covid-19</td>
<td>74%</td>
<td>n/a</td>
</tr>
<tr>
<td>Marketing/website information</td>
<td>71%</td>
<td>1%</td>
</tr>
<tr>
<td>Reassurance of knowledge/friends/family</td>
<td>67%</td>
<td>0%</td>
</tr>
</tbody>
</table>

C6. How important are each of the following to you when deciding which country to study abroad in? n=1925 (All markets)

Note, groupings of all individual statements into themes
PROSPECTIVE STUDENTS WANT TO KNOW HOW HEIS ARE PROTECTING BOTH THEIR HEALTH AND EDUCATION/FUTURE

97%
Have done some research on how HEIs are supporting students’ safety regarding Covid-19

96%
Want reassurance on the value of pursuing Higher education in another country, given Covid-19

94%
Have seen Covid-19 communications from universities

What could be done to reassure you?

- Provide clear information e.g. Covid-19 safety measures, mental health/wellbeing support, campus safety (64%)
- Reassure that students will still receive a top-quality education if travel restrictions make face-to-face learning impossible (60%)
- Reassure on the value of continuing studying abroad e.g. the benefits to career prospects, networking, life experiences (56%)
- Reassurance on the availability and quality of a blended learning offer (56%)

Generally higher proportions in Thailand/Malaysia seeking reassurance

Base: Wave 3 2021:1925 (All Markets) CN (290), IN (332), MY (325), TH (320) IO (330) PK (328) P1. Which, if any, of the following have you researched when thinking about studying abroad? D2. Since the Covid-19 pandemic started, have you noticed any of the below in communications from universities/advertising promoting study abroad that you did not notice before? P4. Given the Covid-19 pandemic, what could universities abroad do to reassure you about the value of pursuing Higher Education in another country at this moment in time?
THE IMPACT OF BREXIT
BREXIT HAS A POSITIVE IMPACT – IT MAKES THE UK A MORE ATTRACTIVE PROSPECT FOR INTERNATIONAL STUDY

Impact of Brexit

Makes me more likely to consider studying in the UK: 56%
Makes no difference: 34%
Makes me less likely to consider studying in the UK: 6%

Base: Total sample – W1 2063 W2 1614 W3 – 1925, China (290), India (332), Malaysia (325) Thailand (320), Indonesia (330), Pakistan (328)
H1a - Now that the UK has left the European Union, how, if at all, does the UK’s exit from the EU (Brexit) impact your intention to study in the UK?
THE GRADUATE ROUTE IS RELEVANT, BUT ROOM TO GROW AWARENESS, ESPECIALLY IN MALAYSIA AND PAKISTAN

‘In 2021, the UK will implement a new graduate route which enables international students to remain in the UK for two years after completion of studies to stay and look for work in the UK. To qualify for this, students will need to have completed a degree at an institution with a track record of compliance and have a valid student visa when they apply.’

86% feel the Graduate Route is relevant to them

Relevance of the Graduate Route

Awareness of the Graduate Route

All markets: 80% in 2020, 80% in 2021
Thailand: 62% in 2020, 60% in 2021
India: 60% in 2020, 60% in 2021
China: 57% in 2020, 60% in 2021
Indonesia: 52% in 2020, 57% in 2021
Malaysia: 46% in 2020, 52% in 2021
Pakistan: n/a

Base: W3 – 1925, China (290), India (332), Malaysia (325) Thailand (320), Indonesia (330), Pakistan (328) H2B. In 2021, the UK will implement a new graduate route which enables international students to remain in the UK for two years after completion of studies to stay and look for work in the UK. To qualify for this, students will need to have completed a degree at an institution with a track record of compliance and have a valid student visa when they apply. Were you aware of this graduate route before today? H2C. And how relevant is this graduate route to you?
PERFORMANCE OF THE UK VS. COMPETITORS
THE UK REMAINS THE MOST CONSIDERED MARKET, WITH A SLIGHT INCREASE IN CONSIDERATION THIS YEAR

Top 5 countries considered

<table>
<thead>
<tr>
<th>Country</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>51%</td>
<td>58%</td>
<td>60%</td>
</tr>
<tr>
<td>USA</td>
<td>56%</td>
<td>57%</td>
<td>56%</td>
</tr>
<tr>
<td>Australia</td>
<td>50%</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>Japan</td>
<td>36%</td>
<td>34%</td>
<td>31%</td>
</tr>
<tr>
<td>Germany</td>
<td>30%</td>
<td>28%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Base: Total W1 2063, W2 1614, W3 1925 S4. If you had the choice of studying for an international degree without any restrictions, from which countries other than your own would you prefer to obtain a higher education degree / qualification?
### THE UK OUTPERFORMS USA ON KEY DECISION-MAKING FACTORS, BUT USA IS ONLY MARGINALLY BEHIND

#### Performance UK vs. USA – 8-10 Scores

<table>
<thead>
<tr>
<th>Factor</th>
<th>UK Performance</th>
<th>USA Performance</th>
<th>YoY Change in UK Rating</th>
<th>YoY Change in USA Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average rating</td>
<td>76%</td>
<td>73%</td>
<td>+2%</td>
<td>+1%</td>
</tr>
<tr>
<td>Quality/innovation/the course I want</td>
<td>81%</td>
<td>78%</td>
<td>0%</td>
<td>-2%</td>
</tr>
<tr>
<td>Cost</td>
<td>77%</td>
<td>72%</td>
<td>+5%</td>
<td>+1%</td>
</tr>
<tr>
<td>Impact on future employability</td>
<td>78%</td>
<td>75%</td>
<td>-1%</td>
<td>+1%</td>
</tr>
<tr>
<td>Living requirements</td>
<td>76%</td>
<td>72%</td>
<td>+2%</td>
<td>0%</td>
</tr>
<tr>
<td>Appealing daily life and culture</td>
<td>78%</td>
<td>74%</td>
<td>-1%</td>
<td>+5%</td>
</tr>
<tr>
<td>Safety &amp; flexibility in face of Covid-19</td>
<td>74%</td>
<td>71%</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Marketing/Website information</td>
<td>74%</td>
<td>71%</td>
<td>+1%</td>
<td>+5%</td>
</tr>
<tr>
<td>Reassurance of knowledge/friends/family</td>
<td>73%</td>
<td>67%</td>
<td>+2%</td>
<td>0%</td>
</tr>
</tbody>
</table>

- Significantly higher at 95% confidence interval

Base: Total sample 1925 Rating the UK, 486 Rating the USA.

C8. How would you rate ... for each of these when it comes to deciding to study there?
### AREAS TO IMPROVE FOR THE UK ARE PERCEPTIONS OF COST/VALUE AND FUTURE EMPLOYMENT PROSPECTS

Gap between **importance** of key decision-making factors & **UK performance**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Importance Difference</th>
<th>UK Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality/innovation/the course I want</td>
<td>-3%</td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>-7%</td>
<td></td>
</tr>
<tr>
<td>Impact on future employability</td>
<td>-5%</td>
<td></td>
</tr>
<tr>
<td>Living requirements</td>
<td>-4%</td>
<td></td>
</tr>
<tr>
<td>Appealing daily life and culture</td>
<td>-1%</td>
<td></td>
</tr>
<tr>
<td>Safety &amp; flexibility in face of Covid-19</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Marketing / website information</td>
<td>+2%</td>
<td></td>
</tr>
<tr>
<td>Reassurance of knowledge / friends / family</td>
<td>+3%</td>
<td></td>
</tr>
</tbody>
</table>

Base: Total sample 1925 Rating the UK
C6. How important are each of the following to you when deciding which country to study abroad in? C8. How would you rate ... for each of these when it comes to deciding to study there?
INFORMATION SOURCES USED AND THE ROLE OF EDUCATION AGENTS
WHILE EDUCATION AGENTS ARE NOT WIDELY USED, USE HAS HELD STRONG DURING THE PANDEMIC

Information sources used to explore study-abroad options (top 10)

- Online information: 67% in 2021, 62% in 2020
- Social media: 59% in 2021, 56% in 2020
- Friends and family: 44% in 2021, 42% in 2020
- Virtual / online education events: 40% in 2021, n/a in 2020
- Teachers / lecturers / counsellors: 38% in 2021, 42% in 2020
- Universities / institutions abroad directly: 45% in 2021, 38% in 2020
- University rankings: 30% in 2021, n/a in 2020
- Education agents: 30% in 2021, 29% in 2020
- Current school / university: 30% in 2021, 26% in 2020
- Country specific education agencies: 27% in 2021, 24% in 2020

% using Education Agents by market (2021)
- China: 40%
- India: 32%
- Malaysia: 32%
- Thailand: 27%
- Indonesia: 22%
- Pakistan: 20%

▼ Significantly lower at 95% confidence interval

Base: Total sample 1925 (All markets) China (290), India (332), Malaysia (325) Thailand (320), Indonesia (330), Pakistan (328) B2.

Which of the following sources of information have you used / will you use to explore your options for studying abroad?
Agents have a strong influence, and their insight is likely to be even more critical during the pandemic.

### Influence of Education agents

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>They can advise me on matters such as visas, accommodation, cost of living, travel etc.</td>
<td>62%</td>
</tr>
<tr>
<td>Trust their knowledge and experience to guide me to most appropriate choice</td>
<td>53%</td>
</tr>
<tr>
<td>Can give in-depth insight into what life would be like</td>
<td>52%</td>
</tr>
<tr>
<td>Make application process easier/smoother</td>
<td>51%</td>
</tr>
<tr>
<td>Good connections with universities</td>
<td>47%</td>
</tr>
<tr>
<td>They offer a personalised approach</td>
<td>35%</td>
</tr>
<tr>
<td>Avoids me having to research what I need to know myself</td>
<td>29%</td>
</tr>
</tbody>
</table>

90% say that education agents are very/somewhat influential in helping them decide which country to study in.

Base: Total Sample China (290) India (332) Malaysia (325) Thailand (320) Indonesia (330) Pakistan (328)

You mentioned that you would use education agents to explore study abroad options, or that they would be influential in deciding a country of study. What are the reasons you say this? B3. To what extent, if at all, do you think the following will be influential in deciding which country you would like to study in?
THE ROLE OF PARENTS (CHINA AND INDIA)
PARENTS HAVE A STRONG INFLUENCE OVER WHERE THEIR CHILDREN CHOOSE TO STUDY

External factors influencing where to study - % selecting ‘Very influential’ (top 10)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Influence of parents – ‘Very influential’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parents</td>
<td>58%</td>
</tr>
<tr>
<td>The ability to travel safely to a specific country</td>
<td>58%</td>
</tr>
<tr>
<td>Online information</td>
<td>56%</td>
</tr>
<tr>
<td>Teachers / lecturers / counsellors</td>
<td>54%</td>
</tr>
<tr>
<td>Flexible start dates</td>
<td>51%</td>
</tr>
<tr>
<td>Current risk of Covid-19 in country</td>
<td>51%</td>
</tr>
<tr>
<td>Social media</td>
<td>44%</td>
</tr>
<tr>
<td>In person education events</td>
<td>43%</td>
</tr>
<tr>
<td>Virtual education events</td>
<td>40%</td>
</tr>
<tr>
<td>Friends</td>
<td>40%</td>
</tr>
</tbody>
</table>

India: 64%
Pakistan: 62%
Thailand: 62%
Indonesia: 60%
Malaysia: 55%
China: 46%

Base: Total sample – W3 – 1925, China (290), India (332), Malaysia (325) Thailand (320), Indonesia (330), Pakistan (328)

B3 To what extent, if at all, do you think the following will be influential in deciding which country you would like to study in?
THE UK HAS HIGH CONSIDERATION LEVELS AMONG PARENTS, BUT OTHER MARKETS ARE SEEN POSITIVELY TOO

Any Consideration (data ranked on China)

Although overall consideration is stable, increased numbers of Chinese parents put UK as 1st choice this year (46% vs. 25% in 2020)

94% of parents say Brexit makes either a positive difference to their intention for their child to study in the UK, or no difference at all

▲ Significantly increased consideration of NZ in China in 2021
Parents want reassurance from universities both on education quality and Covid-19 safety.

What could be done to reassure parents?

99%
Think that universities abroad could do something to reassure them about the Covid-19 pandemic.

72%
Reassure that students will still receive a top-quality education if travel restrictions make face-to-face learning impossible.

71%
Provide clear information e.g. Covid-19 safety measures, mental health/wellbeing support, campus safety.

63%
Reassure on the value of continuing studying abroad e.g. the benefits to career prospects, networking, life experiences.

61%
Reassurance on the availability and quality of a blended learning offer.

Base: All Respondents W3 Parents – China (108) India (120)
The UK maintains a strong global position as a HE provider despite unprecedented challenges to the market.

1. Almost all students have experienced the impact of Covid-19 on their current plans, but there’s still the same medium-term appetite to study in an English-speaking market as before.

2. There is a dual need for universities to reassure prospective students and make them feel safe, but also to inspire them about the quality of education still on offer. They need reminding about the enduring benefits of an international degree from a top-quality institution – which will ultimately make them more employable.

3. Parents have a significant influence over where prospective students will choose to study. They need the same reassurances as students – both safety and quality of education & future prospects are paramount.

4. Reinforcing these key benefits will help to strengthen perceptions of UK degrees being affordable / value for money.

5. With delay to plans the most common outcome of Covid-19, the UK remains in a strong position to connect with students when conditions are more favourable.
1. Make sure you are talking about the Graduate Route - not all prospective students are aware of it, but once they are, it is seen to be relevant.

2. Support Education Agents and upskill them about your offer - they are a valuable tool for prospective students in helping them navigate the pandemic and beyond.

3. Show that you are taking Covid-19 safety seriously, but students also want to know that they can still have the full study-abroad experience. Both in terms of quality of teaching and experiencing the life and culture on offer.

4. Keep the focus on global employability – a critical factor in deciding where to study.

5. Don’t forget that the pandemic is a very frustrating issue for students (e.g. dealing with travel restrictions, online alternatives feeling like a compromise etc), so communicate with sensitivity to help to avoid comms jarring with their lived experience during the pandemic.
THANK YOU

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