

# STUDY UK PROSPECTIVE INTERNATIONAL STUDENT RESEARCH FINDINGS



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POSSIBLE YOU  
MADE POSSIBLE  
IN THE UK.**



# STUDY UK



# CONTENTS

- Introduction to 2CV
- Methodology
- Consideration of the UK and the impact of the pandemic
- The impact of Brexit
- Performance of the UK vs. competitors
- Information sources used and the role of Education agents
- The role of parents (China and India only)
- Key take outs

# Research conducted by 2CV



**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

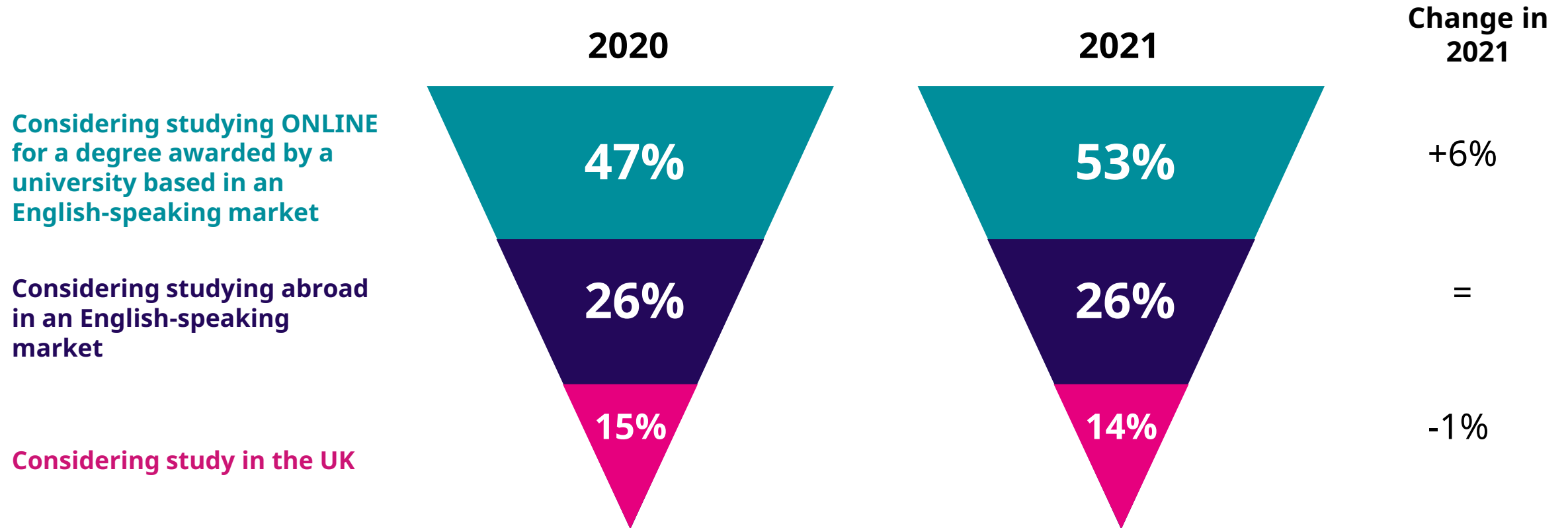


Pakistan

# CONSIDERATION OF THE UK AND THE IMPACT OF THE PANDEMIC

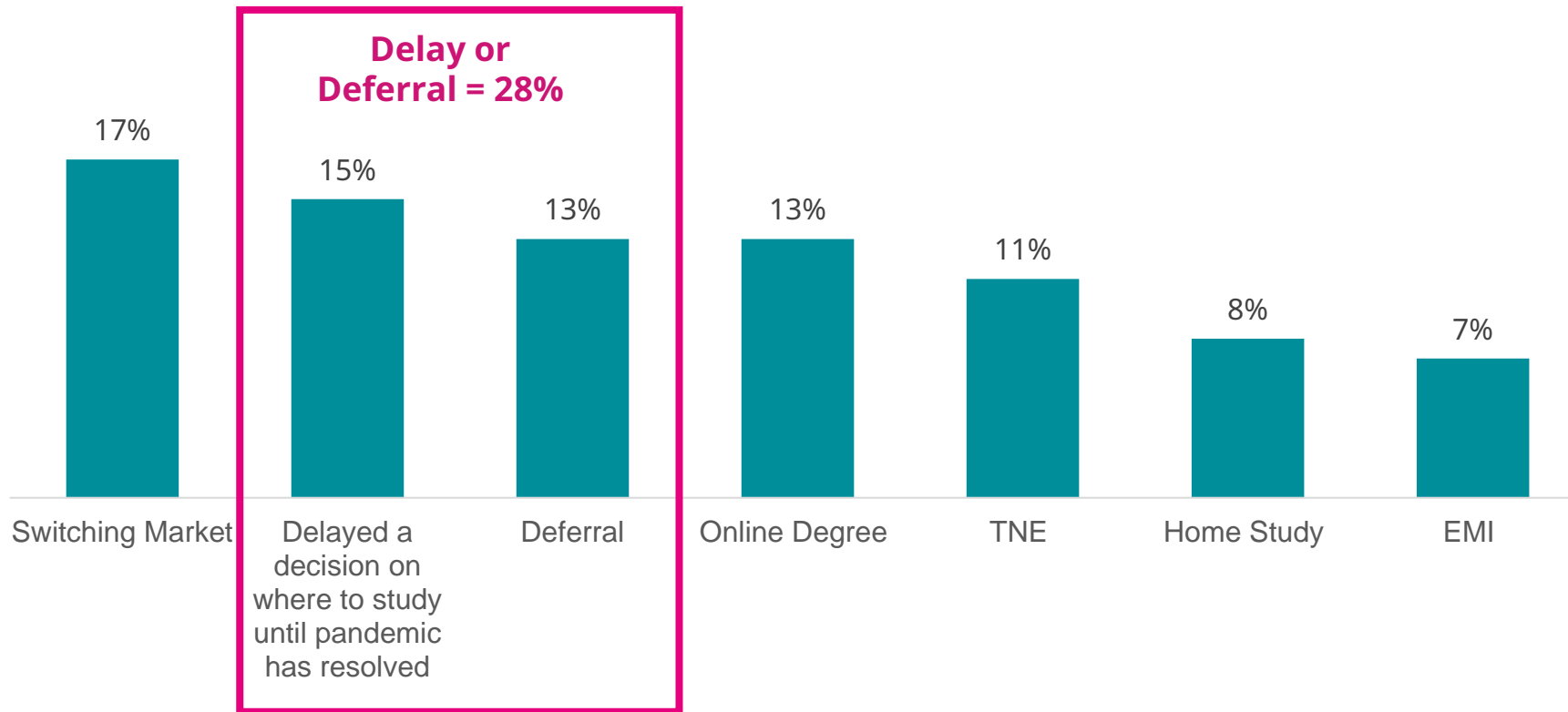
# THE MEDIUM-TERM APPETITE TO STUDY ABROAD (IN THE NEXT THREE YEARS) HAS NOT BEEN IMPACTED BY COVID

Among 16–34-year-olds



# 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



**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

# STUDENTS SAY COVID-19 MAKES STUDY ABROAD FEEL RISKY AND A COMPROMISE

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

## Restricted movement



'I have heard **Australia have cancelled all visas** including students so it becomes difficult for you to consider it'



'I've stopped thinking of it since travelling aboard seems not promising in the upcoming months.'



'Malaysian authorities **banned international travel**. My parents are not allowing me to leave the country due to fear of catching virus.'

## Economy and Jobs



'Covid has **reduced my income level and savings**. This will be burdensome and a struggle if I insist to study abroad now'



'It affected my income so I **didn't have enough money** to study abroad'



'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**'

## Health



'Virus **out of control**, as well as the risks'

'Learning is precious, life is even more'



'Very disturbing and **fear of contracting Covid-19**'



'Afraid of virus mutations that are prevalent in many countries. **Don't know if vaccine is effective enough** to stop the mutation or not.'

## University experience



'The **visa terms and ease of obtaining it has become tough now** and several foreign universities have restructured their entire module.'



'If because of Covid it's 90% online learning, **it is difficult to understand all the teaching**'

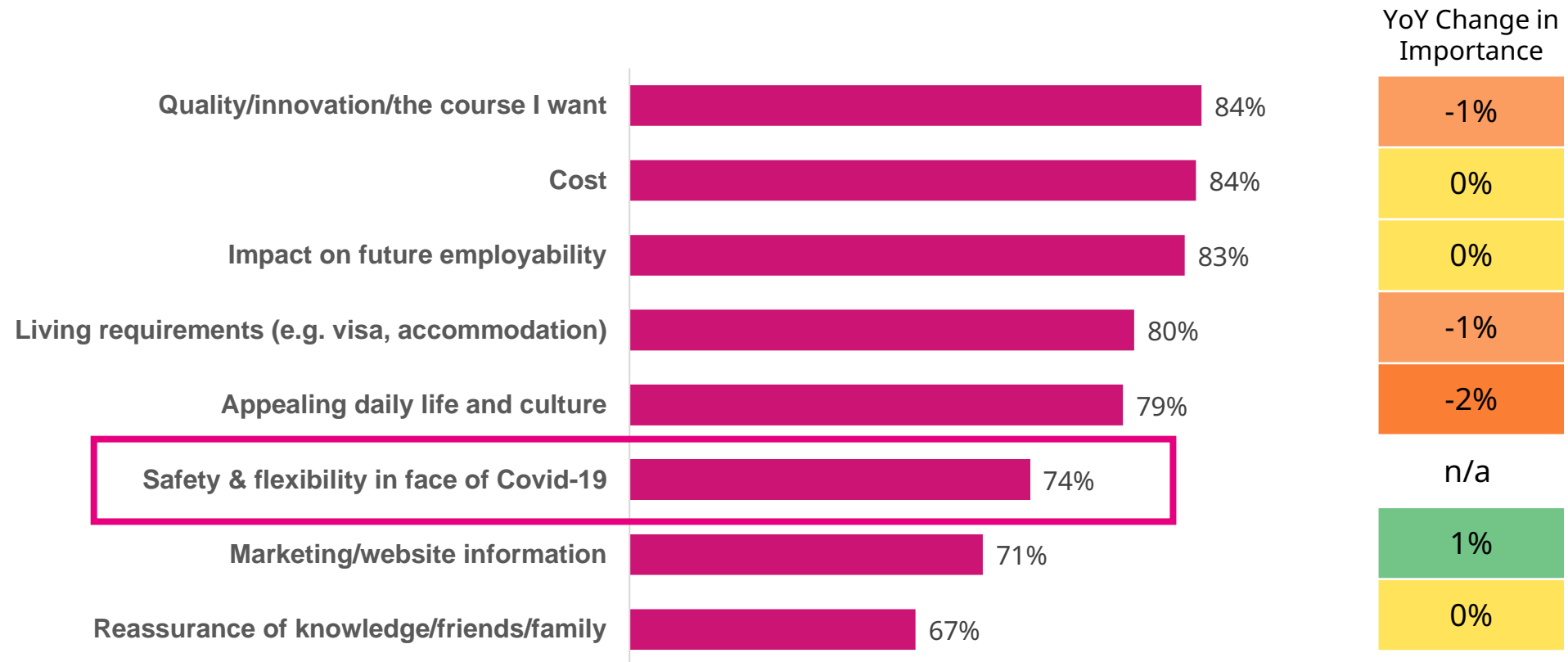


'Most institutions are giving Online Classes. **I want to be able to socially interact and make friends on campus.**'



# PROSPECTIVE STUDENTS WANT REASSURANCE ON COVID-19 MEASURES, BUT THIS IS NOT THEIR KEY PRIORITY

## Important factors when considering where to study abroad – 8-10 Scores, Ranked



# 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

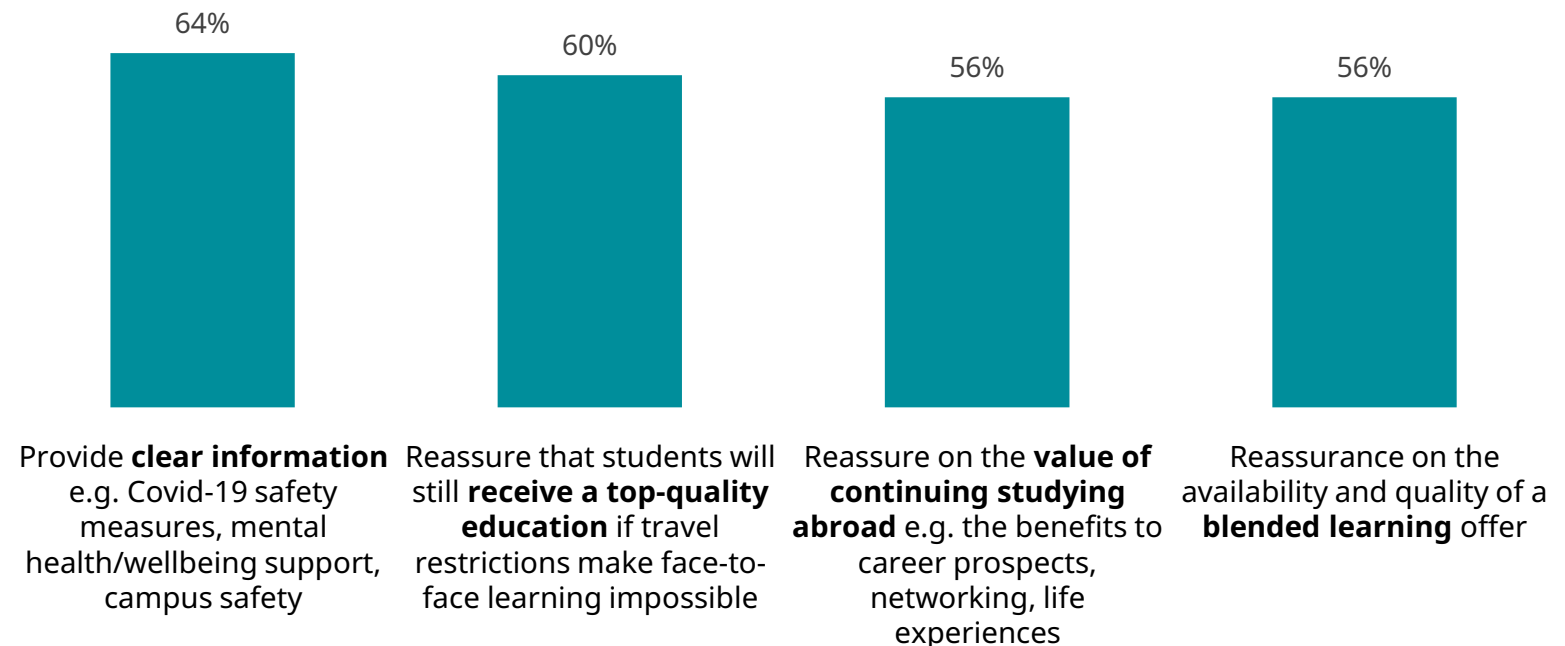
96%

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?

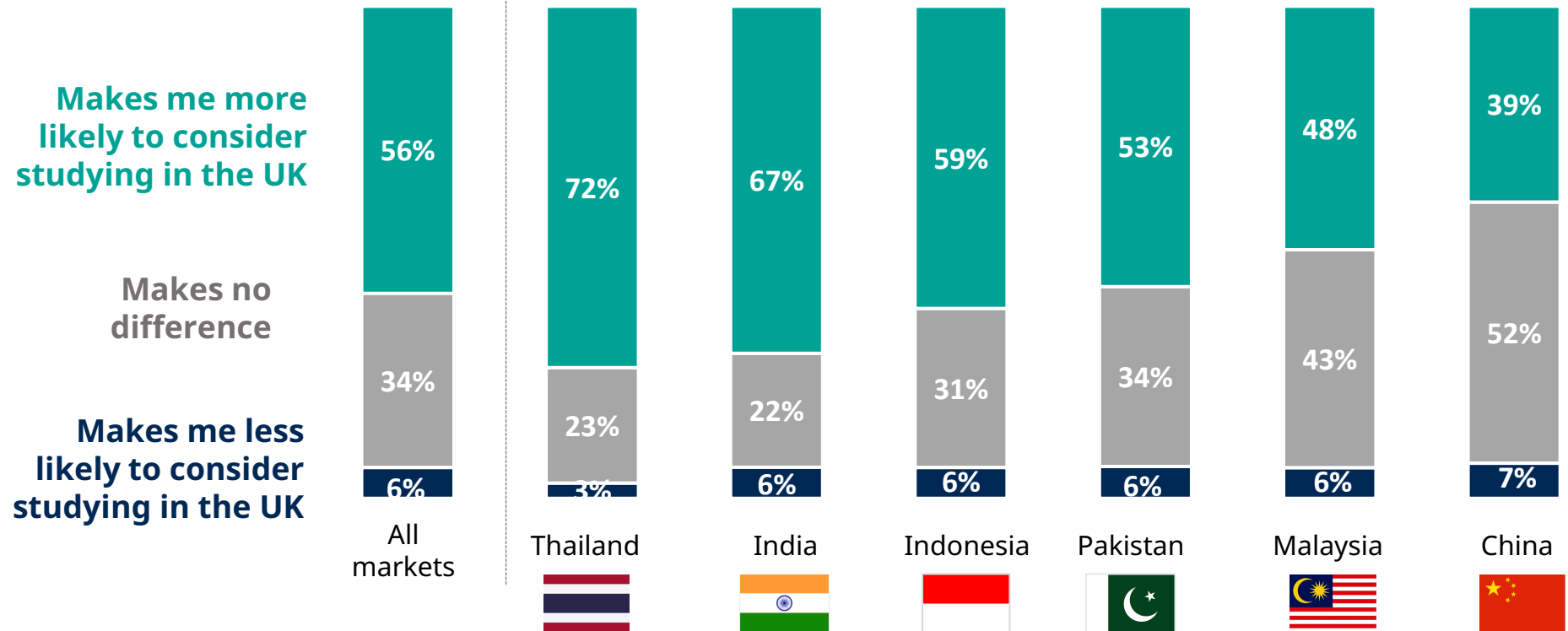


Generally higher proportions in **Thailand/Malaysia** seeking reassurance

# THE IMPACT OF BREXIT

# BREXIT HAS A POSITIVE IMPACT – IT MAKES THE UK A MORE ATTRACTIVE PROSPECT FOR INTERNATIONAL STUDY

## Impact of Brexit



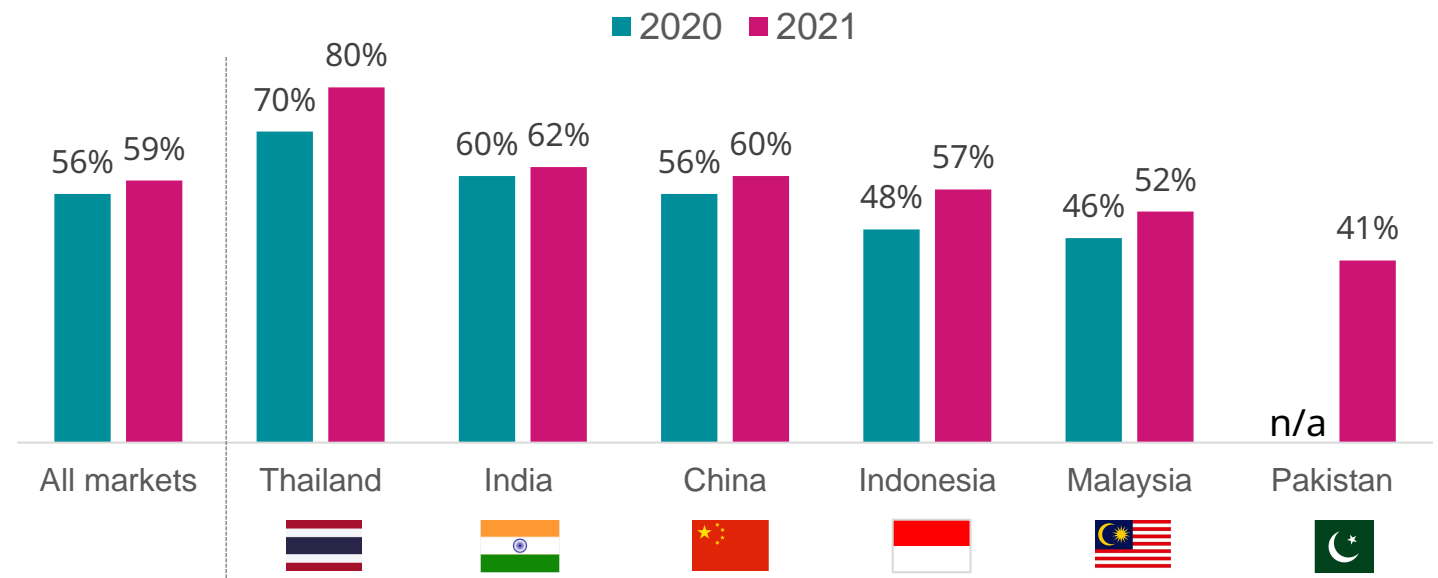
# THE GRADUATE ROUTE IS RELEVANT, BUT ROOM TO GROW AWARENESS, ESPECIALLY IN MALAYSIA AND PAKISTAN

'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.'

## Relevance of the Graduate Route

**86%**  
feel the Graduate Route is relevant to them

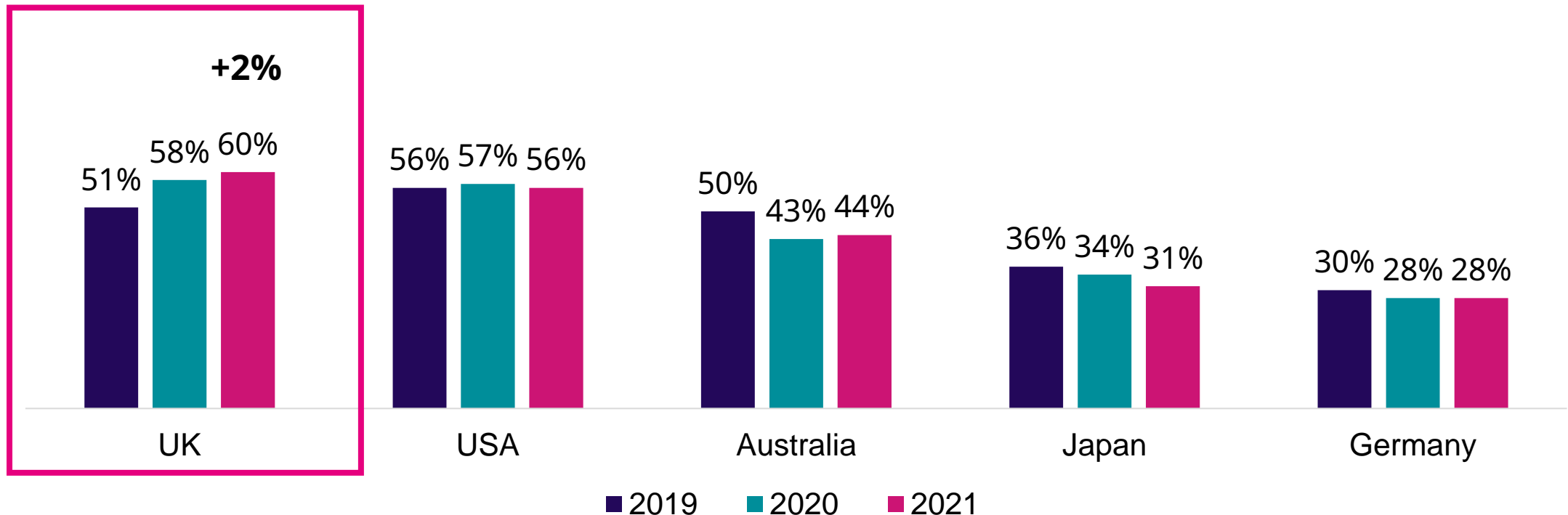
## Awareness of the Graduate Route



# PERFORMANCE OF THE UK VS. COMPETITORS

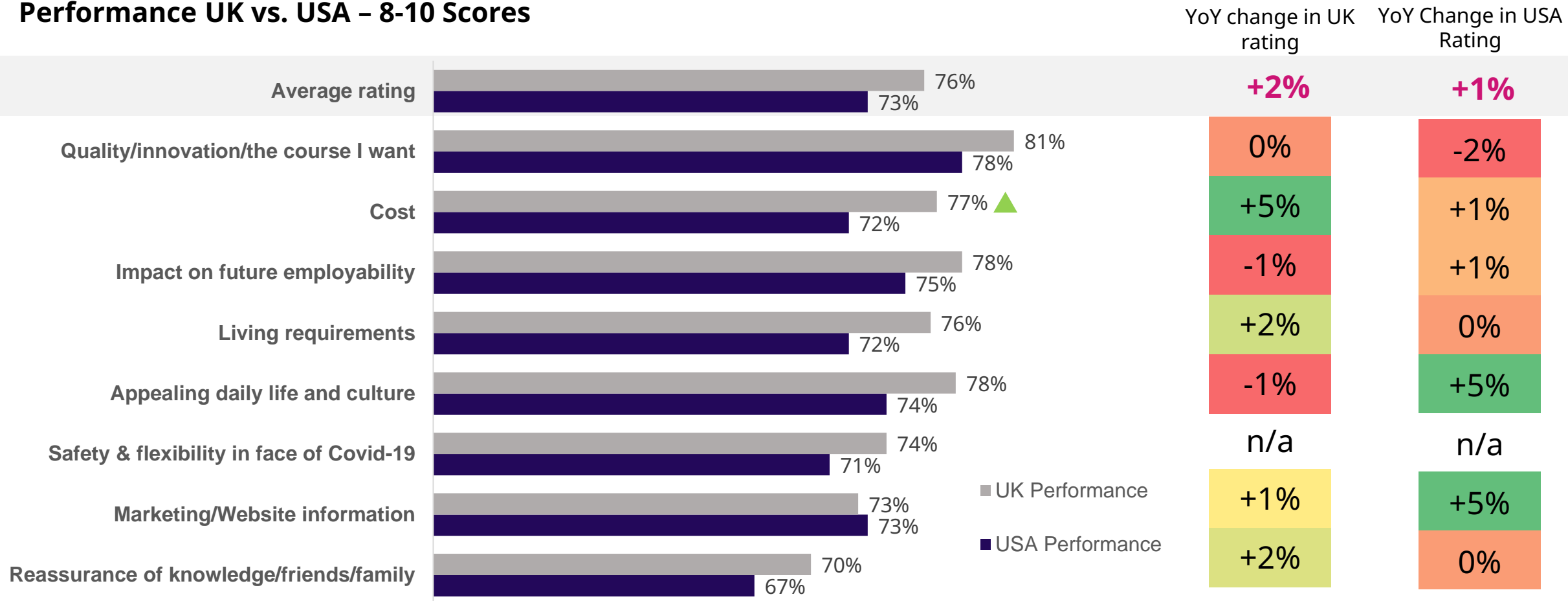
# THE UK REMAINS THE MOST CONSIDERED MARKET, WITH A SLIGHT INCREASE IN CONSIDERATION THIS YEAR

Top 5 countries considered



# THE UK OUTPERFORMS USA ON KEY DECISION-MAKING FACTORS, BUT USA IS ONLY MARGINALLY BEHIND

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



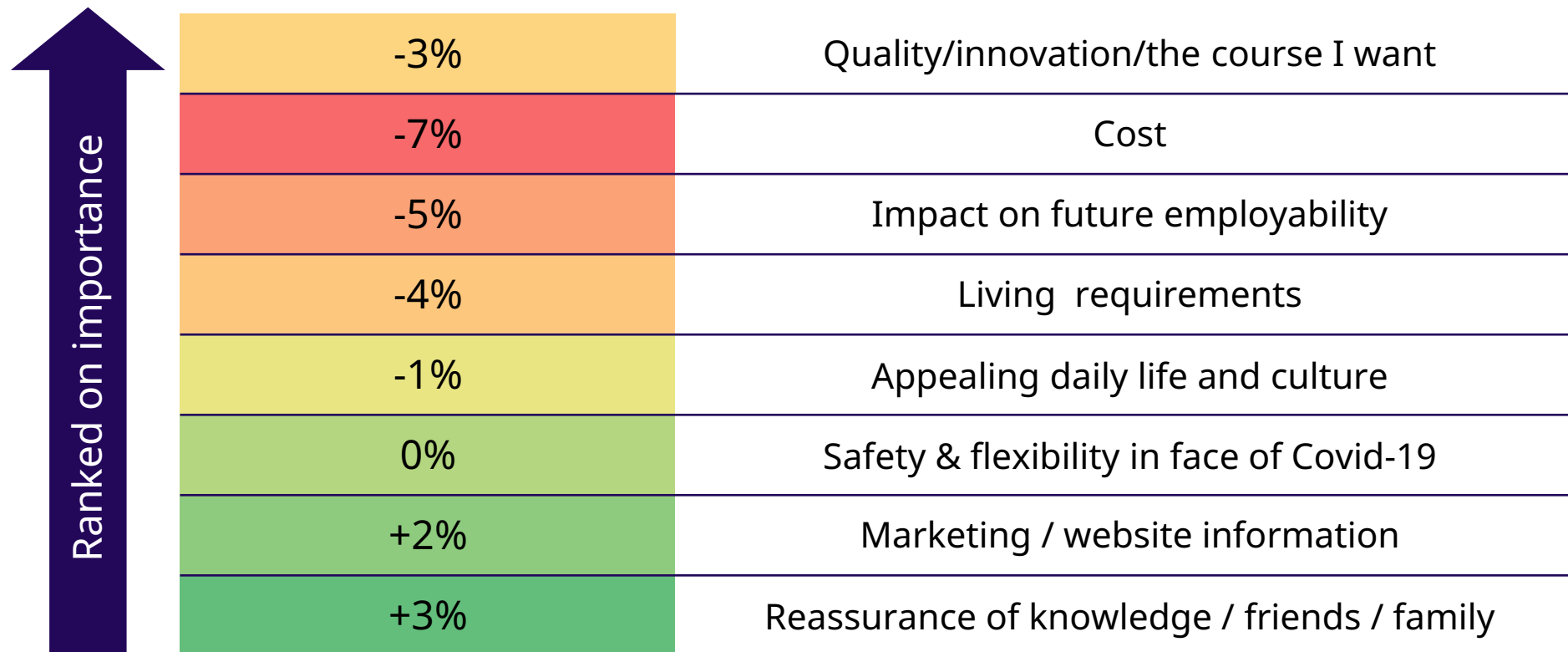
■ UK Performance  
■ USA Performance

▲ Significantly higher at 95% confidence interval



# AREAS TO IMPROVE FOR THE UK ARE PERCEPTIONS OF COST/VALUE AND FUTURE EMPLOYMENT PROSPECTS

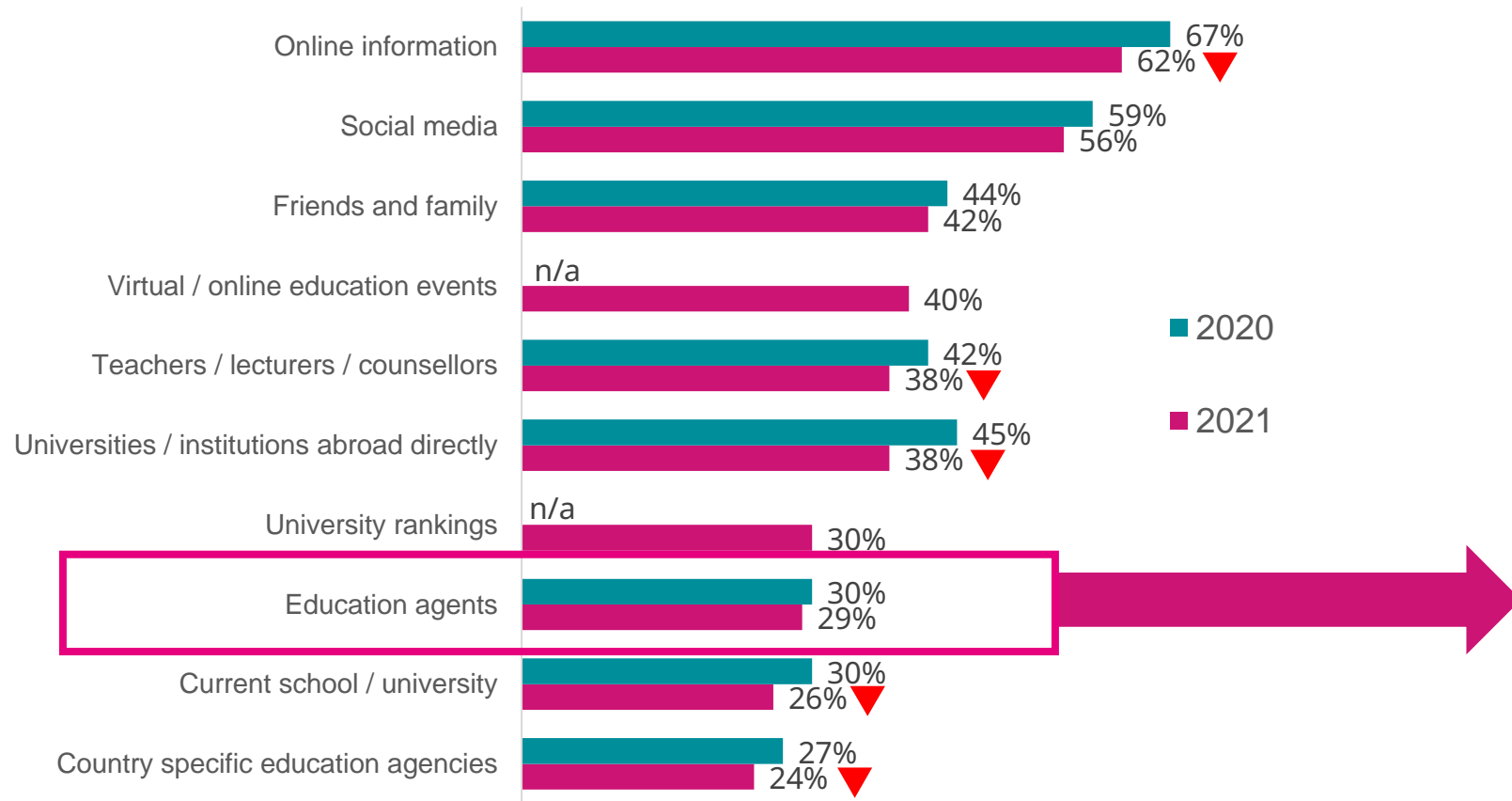
Gap between importance of key decision-making factors & UK performance







# 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)



## % using Education Agents by market (2021)

	China	40%
	India	32%
	Malaysia	32%
	Thailand	27%
	Indonesia	22%
	Pakistan	20%

▼ Significantly lower at 95% confidence interval

# AGENTS HAVE A STRONG INFLUENCE, AND THEIR INSIGHT IS LIKELY TO BE EVEN MORE CRITICAL DURING THE PANDEMIC

## Influence of Education agents

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

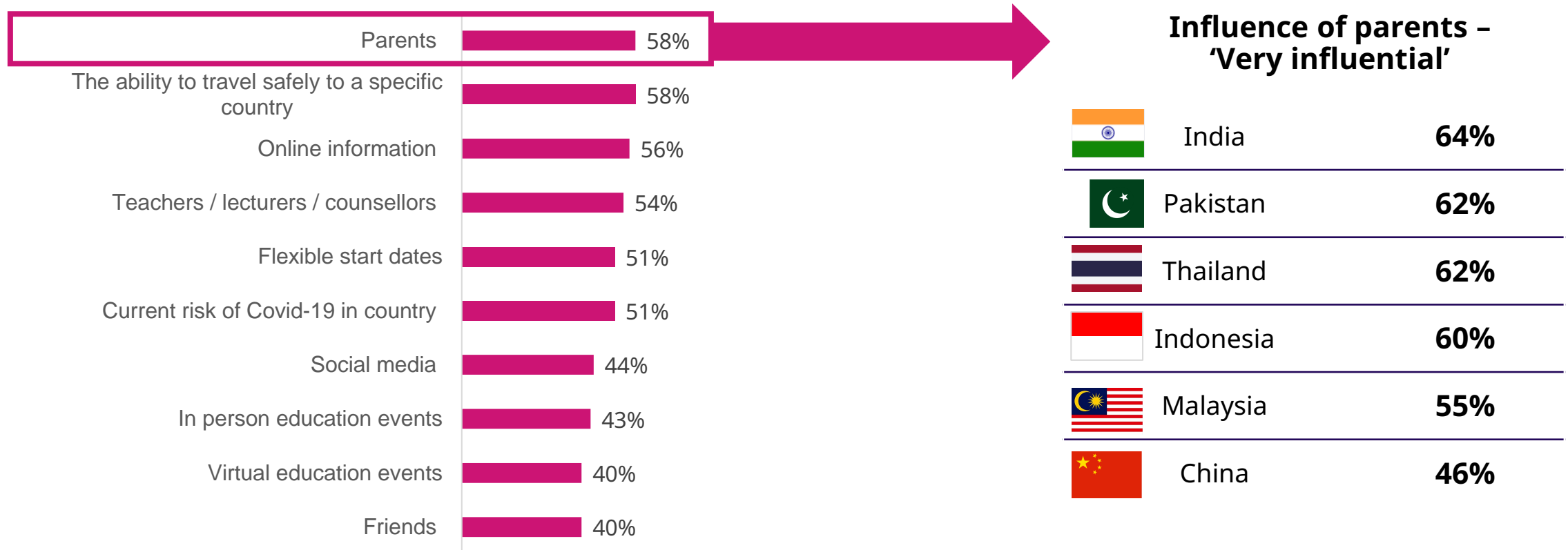
## Why agents are/would be used



# THE ROLE OF PARENTS (CHINA AND INDIA)

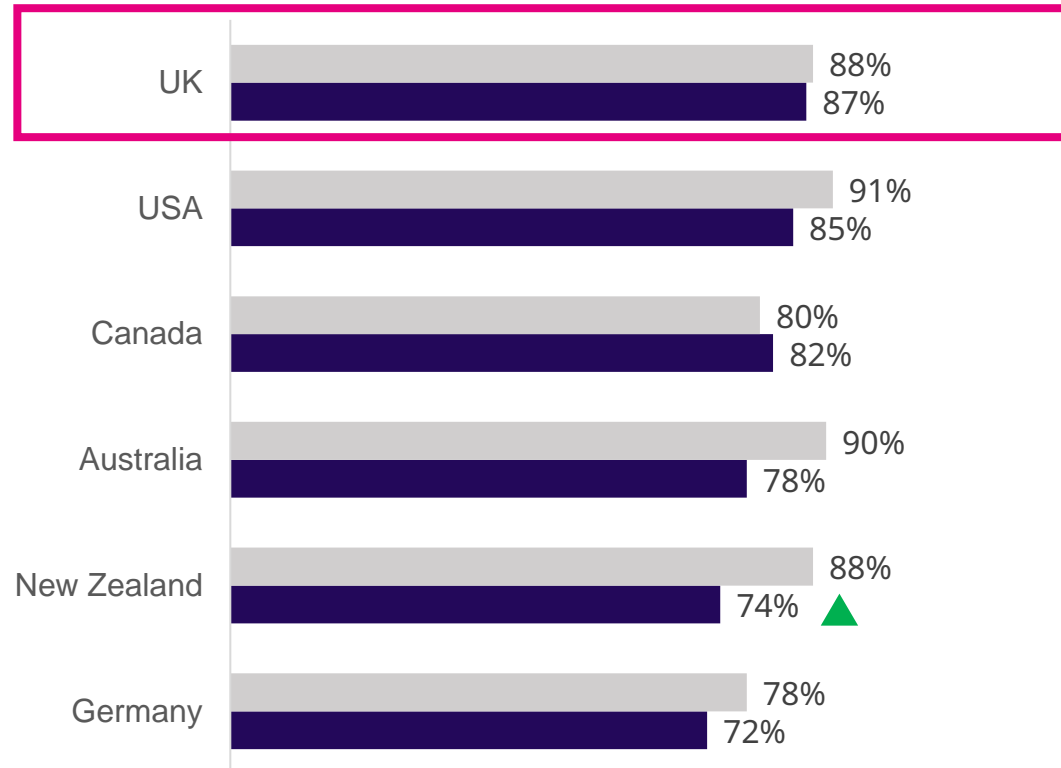
# PARENTS HAVE A STRONG INFLUENCE OVER WHERE THEIR CHILDREN CHOOSE TO STUDY

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



# 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 1<sup>st</sup> choice this year (46% vs. 25% in 2020)

■ India  
■ China

**BREXIT**

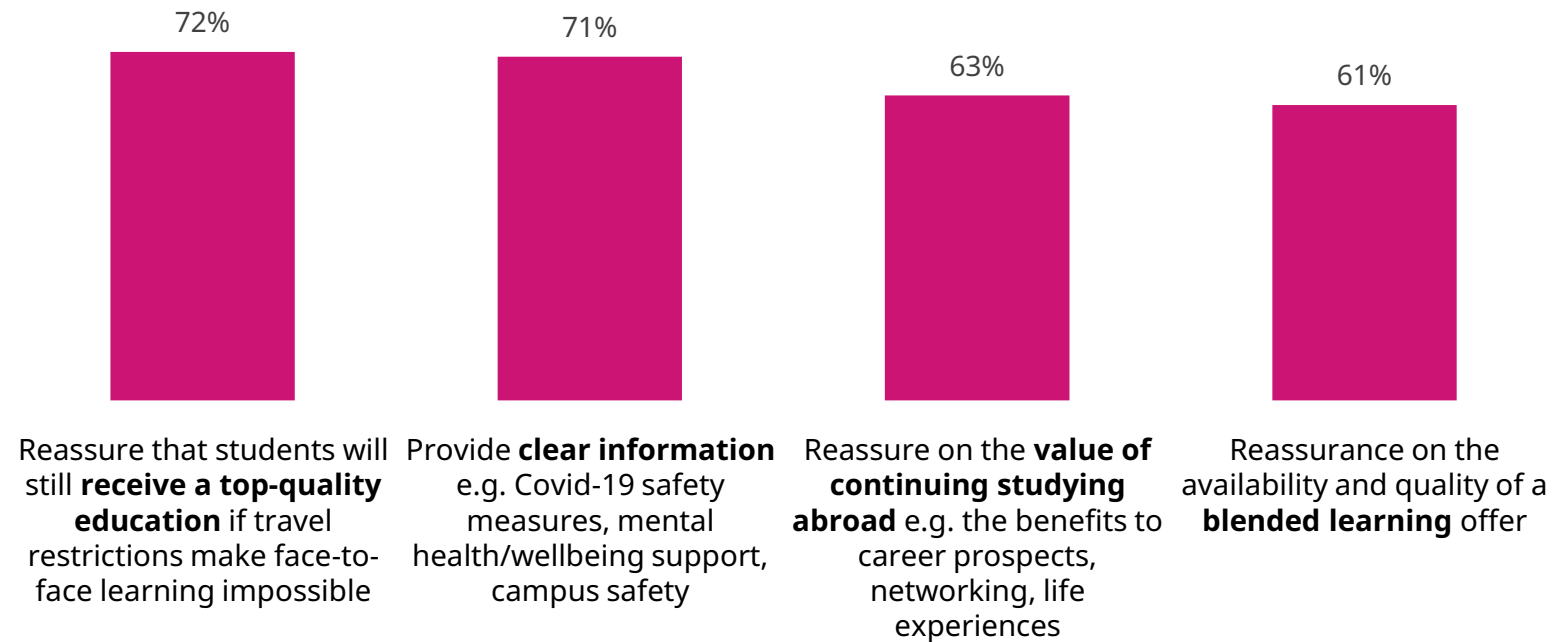
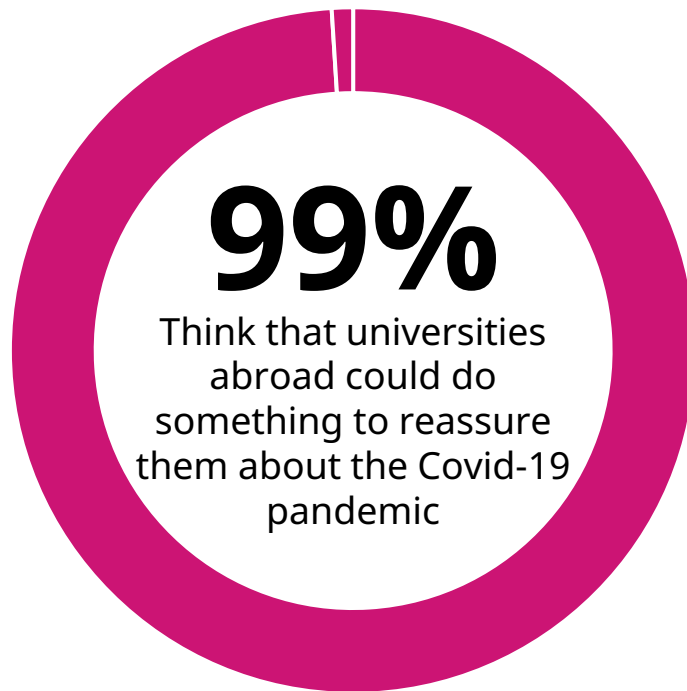
**94%**

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?





# KEY TAKEOUTS

# KEY TAKE OUTS

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.

# ACTIONS FOR HEIS TO CONSIDER

There are a number of actions HEIs could take to put themselves in the best position for success.

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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