# EU CONSIDERERS STUDY RESEARCH FINDINGS

## SPRING 2021

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MADE POSSIBLE IN THE UK.


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- What impacts decision making more widely?
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# 2021 OBJECTIVES

| | |
|---|---|
| **The Opportunity for Higher Education in the UK among EU students** | • What is the awareness and consideration of different modes of study (e.g. TNE) and has this changed following Covid-19?<br>• Vs. 2020, is there a change in the appetite for Higher Education in English speaking markets and specifically the UK vs. international competitors?<br>• What is the impact of Brexit and the new Graduate Immigration Route? |
| **The student experience in light of the pandemic** | • What drives student decision-making now that the landscape has changed so much?<br>• What do students want their study experience to look like given the pandemic?<br>• How important is safety, health and wellbeing? |
| **Perceptions of the UK as a study destination** | • How well does the UK meet student needs? How well do international competitors?<br>• How do students rate the UK blended learning offer & Covid-19 response vs. other markets?<br>• Generally, how has the image of the UK as a study destination fared in a difficult year? |
| **Campaign performance** (light touch) | • We tracked the 2021 campaign in France and Germany for the first time. How did it perform on KPIs: Awareness, Attribution and Evaluation? |

# APPROACH AND SAMPLE

# METHODOLOGY

## This is Year 2 (2021) of tracking in the EU Markets

**906 prospective TSM students across France, Germany, Poland, Greece**

- All 16-34 years old
- 15 minute survey
- **Must be considering UG or PG traditional student mobility in an English-speaking country in the next 3 years**
- Quotas on age, level considering studying
- The data has been weighted to 50% UG / 50% PG and 50% 16-24 / 50% 25-34

Where relevant, we have compared this year's data (2021) to last year (2020). However, comparisons are not possible for all questions due to questionnaire changes.

**In 2020, we tracked in 5 markets (Spain was also included). Therefore, we have trended data (2021 vs. 2020) on 4 markets only (excluding Spain) to ensure a fair comparison**

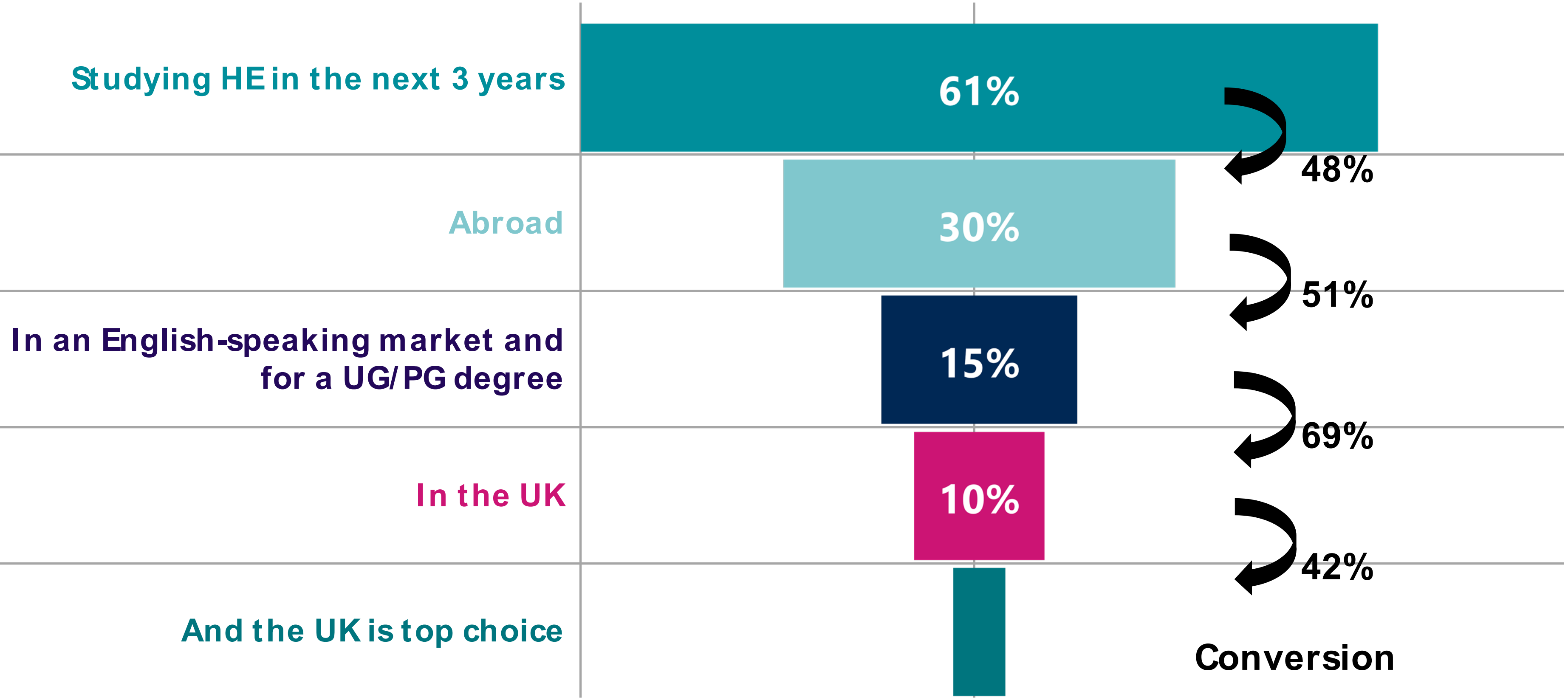
| | UG | PG | TOTAL |
|---|---|---|---|
| France | 80 | 148 | 228 |
| Germany | 85 | 148 | 233 |
| Greece | 65 | 151 | 216 |
| Poland | 110 | 119 | 229 |

# CONSIDERATION

## The biggest challenge remains to increase conversion from consideration to 'first choice' for the UK

TNE uplift is how much TNE adds to the total (i.e. subtract this to only see TSM)

**Conversion funnel | Screenout data**
**% who are considering…**




| | YOY CHANGE | TNE UPLIFT |
|---|---|---|
| Studying HE in the next 3 years | 1% | - |
| Abroad | 1% | 6% |
| In an English-speaking market and for a UG/PG degree | -1% | 3% |
| In the UK | -2% | 2% |
| And the UK is top choice | -1% | 1% |

S1. Which of the following have you heard of before today? S2. Are you considering doing any of the following in the next 3 years? S3. Which countries other than your own would you consider studying abroad in? S4. At what level are you considering studying? Base: Screenouts and completes aged 16-34, accepting 2CV T&Cs (7535)

# CONSIDERATION

## While the overall appetite for study-abroad varies slightly by market, typically the UK opportunity is consistent at 4-6% top choice

### UK Conversion funnel | screenout data

| | TOTAL all markets | | France/conversion | | Germany/conversion | | Greece/conversion | | Poland/conversion | |
|---|---|---|---|---|---|---|---|---|---|---|
| Studying HE in the next 3 years | 61% | | 59% | | 61% | | 55% | | 72% | |
| Abroad (inc. TSM & TNE abroad) | 30% | 48% | 34% | 57% | 31% | 51% | 22% | 40% | 34% | 48% |
| In an English-speaking market and for a UG/PG degree | 15% | 51% | 17% | 52% | 17% | 55% | 11% | 50% | 16% | 48% |
| In the UK | 10% | 69% | 10% | 59% | 11% | 62% | 9% | 79% | 13% | 77% |
| And the UK is top choice | 4% | 42% | 4% | 34% | 4% | 34% | 4% | 47% | 6% | 51% |



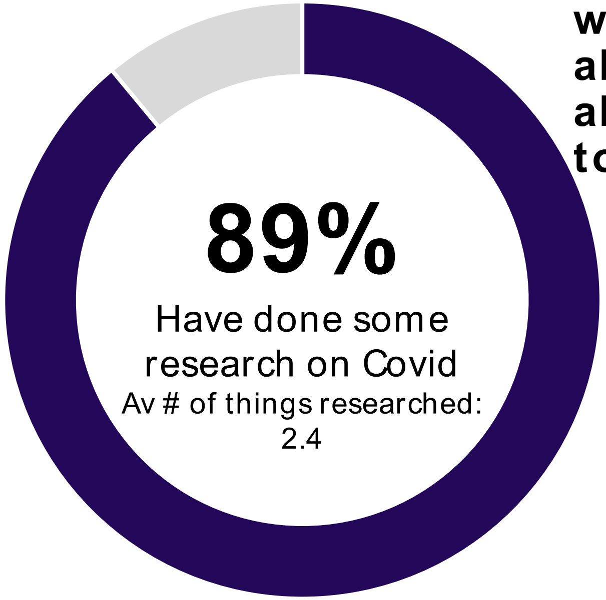
S1. Which of the following have you heard of before today? S2. Are you considering doing any of the following in the next 3 years? S3. Which countries other than your own would you consider studying abroad in? S4. At what level are you considering studying? Screenouts and completes aged 16-34, accepting 2CV T&Cs FR (1688), DE (1747), GR (2426), PL (1674)

# COVID-19

How has Covid-19 impacted study plans and decisions?

# RESEARCHING COVID-19

## The majority have done research surrounding Covid-19 and their study plans; it's a topic students actively engage with




| FR | DE | GR | PO |
|---|---|---|---|
| 95% | 87% | 81% | 91% |

**Research done while thinking about studying abroad, relating to study plans**

- **46%** How universities will support students if international travel is restricted
- **43%** How a country you are considering has responded e.g. legislation, lockdowns
- **41%** How universities are putting measures in place to keep students as safe
- **41%** What support universities have to help with mental health and wellbeing
- **39%** Current Covid-19 infection rate in a country you are considering

Messaging should highlight proactive steps taken on what universities are doing to support students

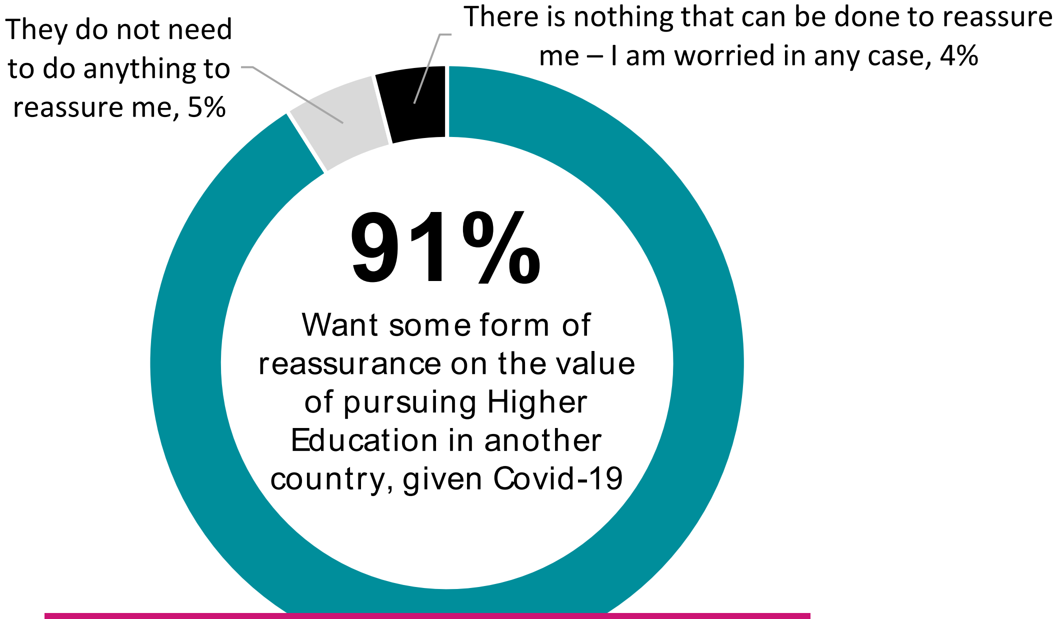


P1. Which, if any, of the following have you researched when thinking about studying abroad?
Total Base: Wave 2 2021: 906

# LOOKING FOR REASSURANCE

## Students want universities to reassure on how the potential impact to their education will be minimised, as well as on safety measures

### 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?




| FR | DE | GR | PO |
|---|---|---|---|
| 96% | 88% | 87% | 93% |

- **51%** Reassurance that international students will still receive top-quality education if there are travel restrictions that make face-to-face learning impossible
- **47%** Clear information e.g. Covid-19 safety measures, support for student mental health and wellbeing, campus safety
- **45%** Reassurance on the availability and quality of a blended learning offer: a mixture of online and face-to-face learning
- **42%** Reassurance on the value of continuing to plan to study abroad e.g. the benefits to career prospects, networking, life experiences

# UK PERCEPTIONS

## The UK is seen to have a higher Covid-19 risk vs. other EU markets, however it rates well for blended learning and online options

### Country performance | total

% T2B net (all rating any statement positively)

| COVID FACTORS | |
|---|---|
| **UK** | **93%** |
| USA | 92% |
| Netherlands | 91% |
| Germany | 85% |

| | UK | USA | NETHERLANDS | GERMANY |
|---|---|---|---|---|
| Quality online teaching with the same level if f2f teaching is not permitted | 62% | 58% | 56% | 49% |
| How safe students are made to feel by universities | 55% | 46% | 62% | 55% |
| Availability of a blended learning offer: mixture of online/f2f | 61% | 60% | 54% | 48% |
| Low Covid-19 risk | 33% | 26% | 52% | 41% |
| Full online courses | 60% | 60% | 52% | 47% |

The Covid-19 country risk level is out of the control of universities, but the reaction and solutions **can** be managed. The UK has strengths here on blended learning and online options, so these are key to communicate



B3. T2B Summary - How would you rate the following countries for each of these when it comes to deciding to study there?
Base. UK (906), USA (906), Netherlands (233), Germany (673)

# COVID-19 IMPACT

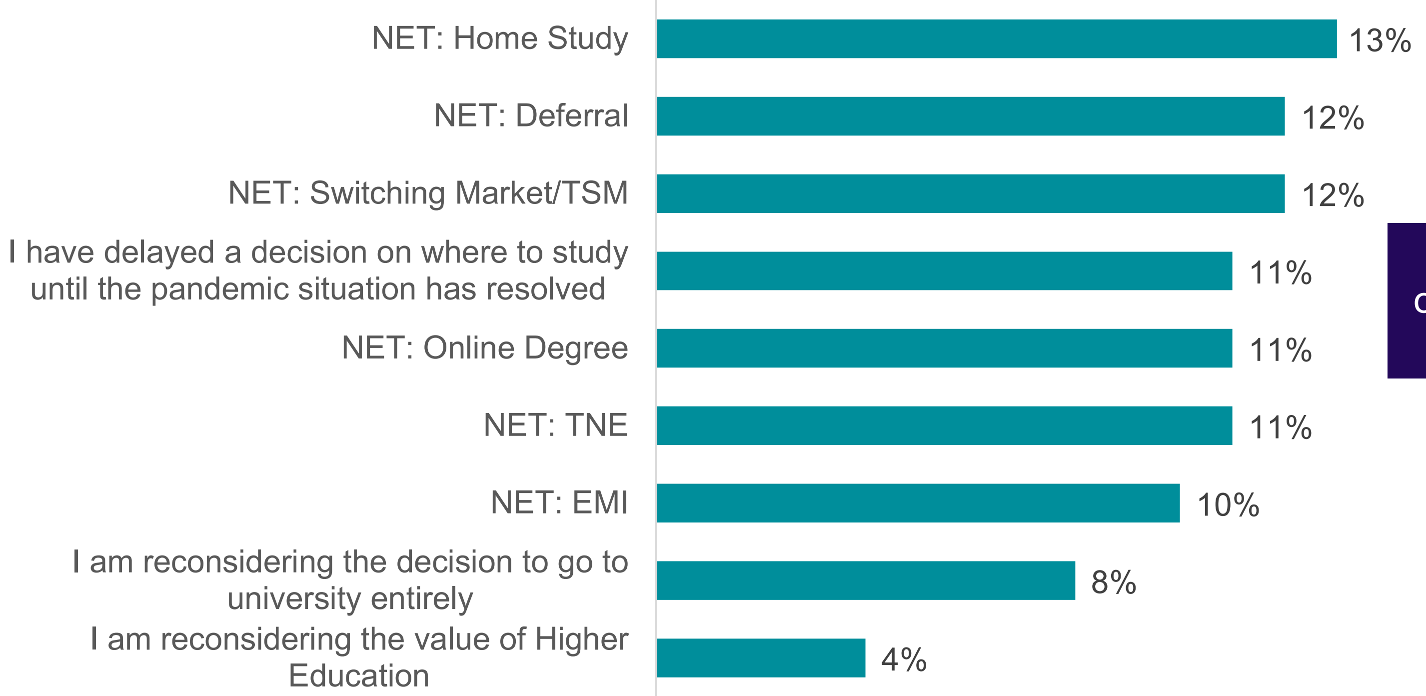
## For almost all, study plans have been impacted due to Covid-19 with a quarter saying they would delay or defer, but no ‘one size fits all’ answer

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

**40%**
Have explored an alternative

**29%**
Have done something different

**7%**
Covid-19 has **not** impacted my study abroad plans




Deferral or Delay = 23%

Make potential students aware of all the different options/alternatives that are available to suit different needs re. Covid-19

P2. Which, if any, of the following statements BEST describes your current study abroad plans, taking into account the Covid-19 pandemic?
Total Base: Wave 2 2021: 906

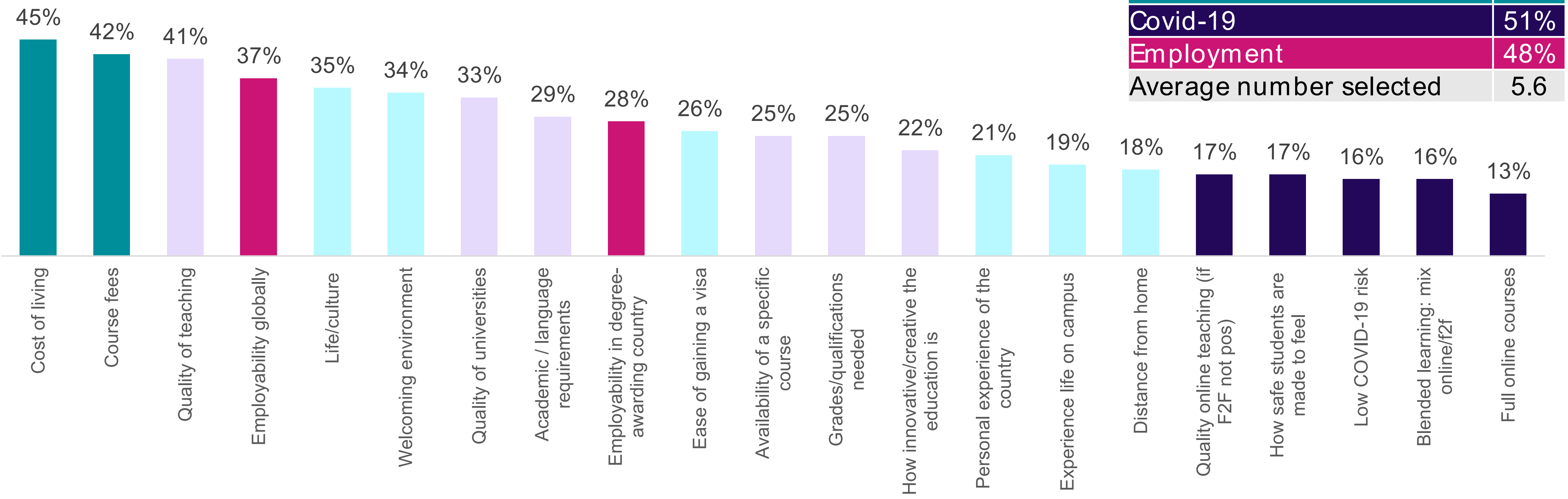
# DECISION MAKING

Aside from Covid-19, what impacts decision making more widely?

# INFLUENCING FACTORS

## Cost, teaching and employability are most important, well ahead of Covid-19 factors, and need to be communicated most

### Important factors when deciding which country to study abroad in

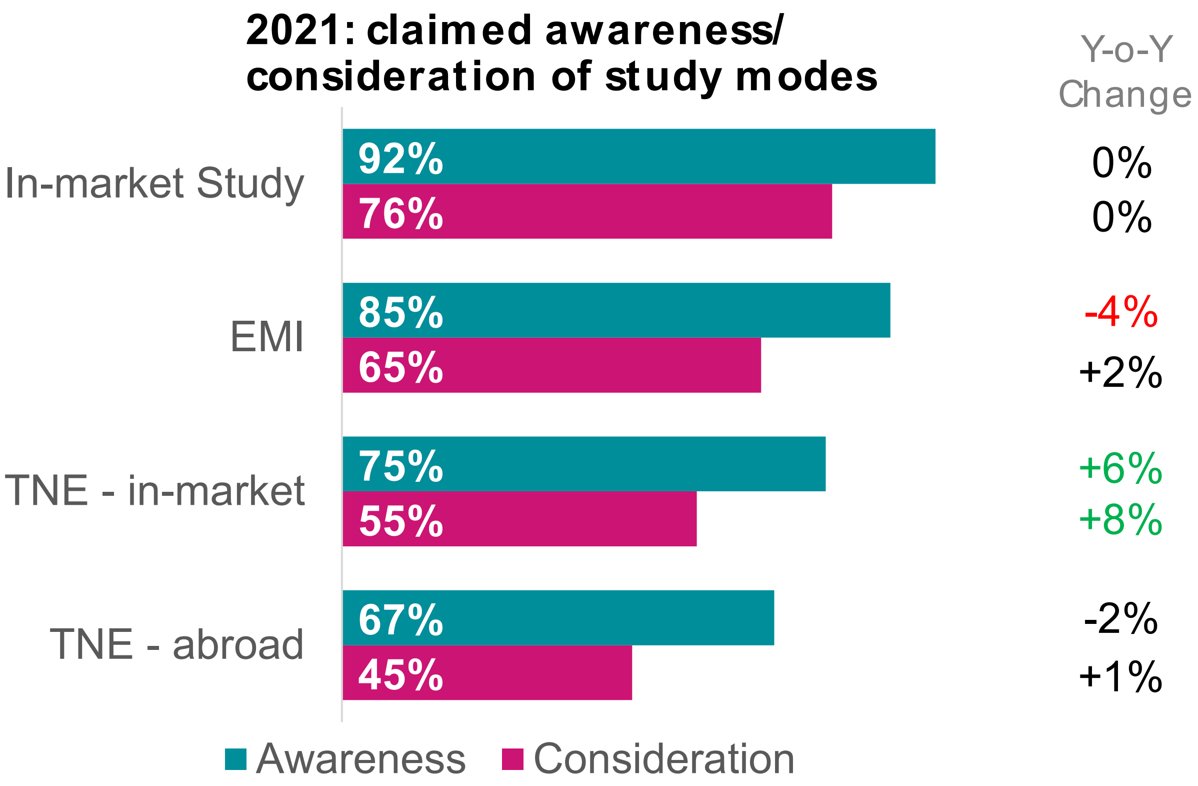



| NETS | |
|---|---|
| Courses & Quality | 67% |
| Culture/Previous experience | 63% |
| Cost | 56% |
| Covid-19 | 51% |
| Employment | 48% |
| Average number selected | 5.6 |

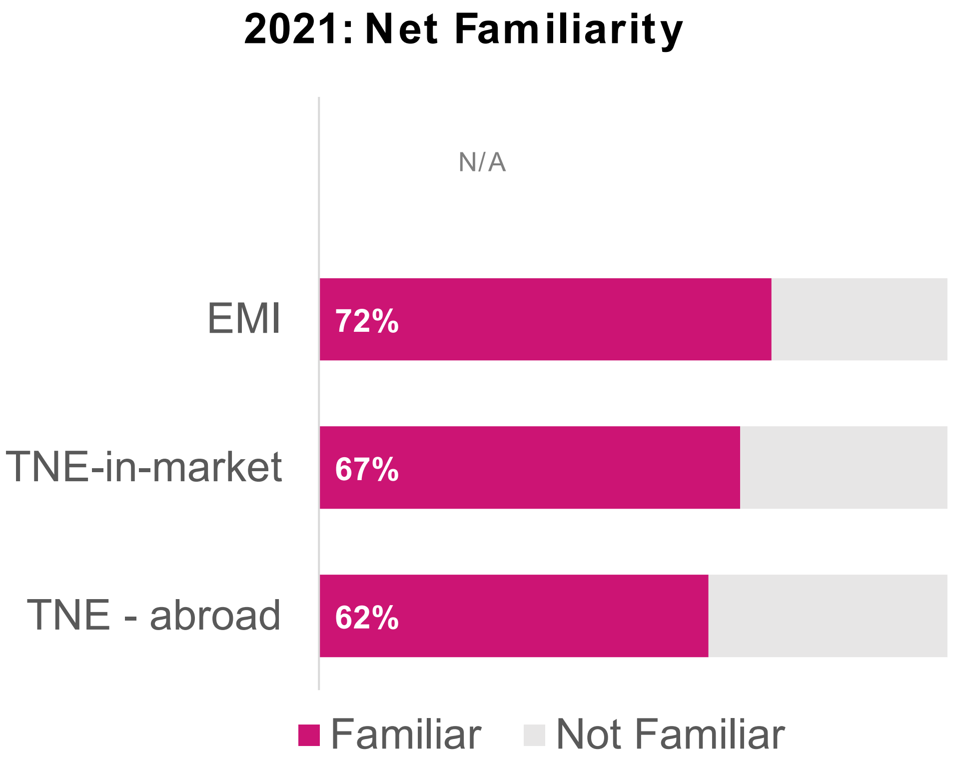
B2New. Which of the following are important to you when deciding which country to study abroad in?
Total Base: Wave 2 2021: 906

# TNE

## Awareness and consideration of TNE – in market has increased since 2020, potentially linked to Covid-19 travel restrictions




Sig higher/sig lower vs. 2020 (Wave 1)




Room to grow familiarity of TNE in-market, in order to increase consideration



S1. Which, of the following types of degree level qualifications have you heard of before today
S2. Are you considering doing any of the following in the next 3 years?
A1a. How familiar would you say you are with each of the following possible ways of studying for a degree?
Total Base: Wave 1 2020: 900, Wave 2 2021: 906

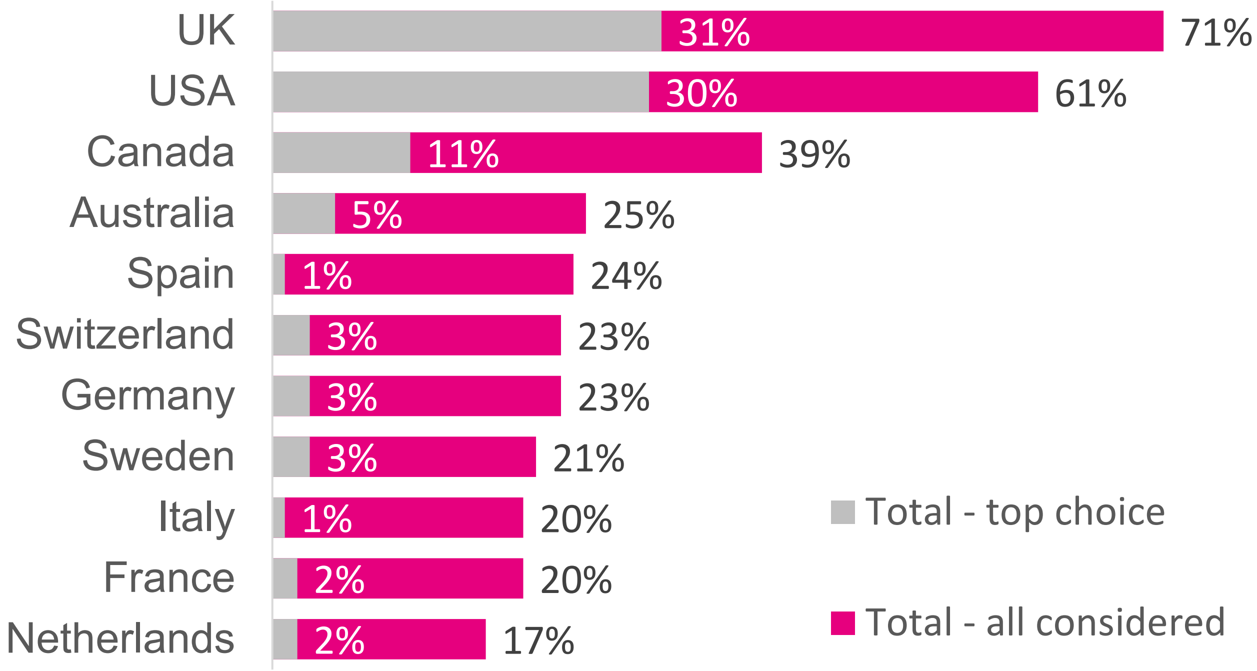
# PERCEPTIONS OF THE UK

How is the UK seen as a study destination?

# UK COMPETITORS

## The UK is the most considered place to study, ahead of the USA, however this lead has decreased since 2020

**Countries considered studying in**  **Average:** 4.1 considered




| YOY % CHANGE | |
|---|---|
| **ALL** | **TOP CHOICE** |
| -5% | -4% |
| +2% | +4% |
| +1% | +1% |
| 0% | +1% |
| +2% | -2% |
| -1% | -1% |
| +4% | +1% |
| -3% | 0% |
| -1% | 0% |
| -1% | 0% |
| -2% | -1% |

**Conversion = 44%** from considered to top choice for UK

Decrease driven by Poland and Germany (stable in France and Greece)

We'll explore barriers to studying in the UK, later in the deck.

Important to note that students are open to lots of countries (and consideration stable), with USA the biggest competitor

S3. Which countries other than your own would you consider studying abroad in? S3b which country would be your preferred choice to study for an international degree? – countries considering Base. Total sample 2020: 900, 2021: 906

*Sig higher / lower vs. 2020 95% LOC*

# UK STRENGTHS

## The UK is well recognised for quality, culture, careers, job prospects and Covid-19 response, with very few shifts vs. 2020

**% T2B net (anyone rating any relevant statement positively) | Total**

**Course, requirement and quality of education**

| | 2021 | YOY |
|---|---|---|
| **UK** | **96%** | **+1%** |
| USA | 96% | +4% |
| N'lands | 89% | +1% |
| Germany | 87% | +7% |

**Culture**

| | 2021 | YOY |
|---|---|---|
| N'lands | 96% | 0% |
| **UK** | **95%** | **+2%** |
| Germany | 92% | +3% |
| USA | 90% | +4% |

**Cost**

| | 2021 | YOY |
|---|---|---|
| N'lands | 73% | -1% |
| Germany | 66% | +1% |
| **UK** | **56%** | **-2%** |
| USA | 47% | -2% |

**Employment**

| | 2021 | YOY |
|---|---|---|
| **UK** | **85%** | **+3%** |
| USA | 84% | +5% |
| Germany | 73% | +8% |
| N'lands | 73% | -2% |

**Covid-19**

| | 2021 | YOY |
|---|---|---|
| **UK** | **93%** | **-** |
| USA | 92% | - |
| N'lands | 91% | - |
| Germany | 85% | - |

Competitors however see more significant gains since last year – especially Germany and USA

Sig higher/sig lower vs. 2020 (Wave 1)

B3. T2B Summary - How would you rate the following countries for each of these when it comes to deciding to study there?
Base. UK (906), USA (906), Netherlands (233), Germany (673)

# QUALITY OF TEACHING

## Institution quality is a key strength for the UK, leading the way and gaining on teacher quality over the US

### Country performance | total

% T2B net (all rating positively)

| Course, requirement and quality of teaching | |
|---|---|
| **UK** | **96%** |
| USA | 96% |
| Netherlands | 89% |
| Germany | 87% |

| | UK | USA | NETHERLANDS | GERMANY |
|---|---|---|---|---|
| Quality of universities and academic research | 77% | 75% | 54% | 55% ▲ |
| Quality of teaching | 77% ▲ | 68% | 61% | 61% ▲ |
| Academic / language requirements for studying | 72% | 72% | 55% | 43% |
| Availability of a specific course | 68% | 69% | 51% | 50% |
| How innovative and creative the education system is | 64% | 66% | 62% | 50% |
| Grades/qualifications needed to apply | 60% | 56% ▲ | 53% | 46% |

Prospective students already acknowledge the UK's high-quality education

Messages that aim to encourage students to study should focus on other, less strongly held perceptions (e.g., innovation/creativity)

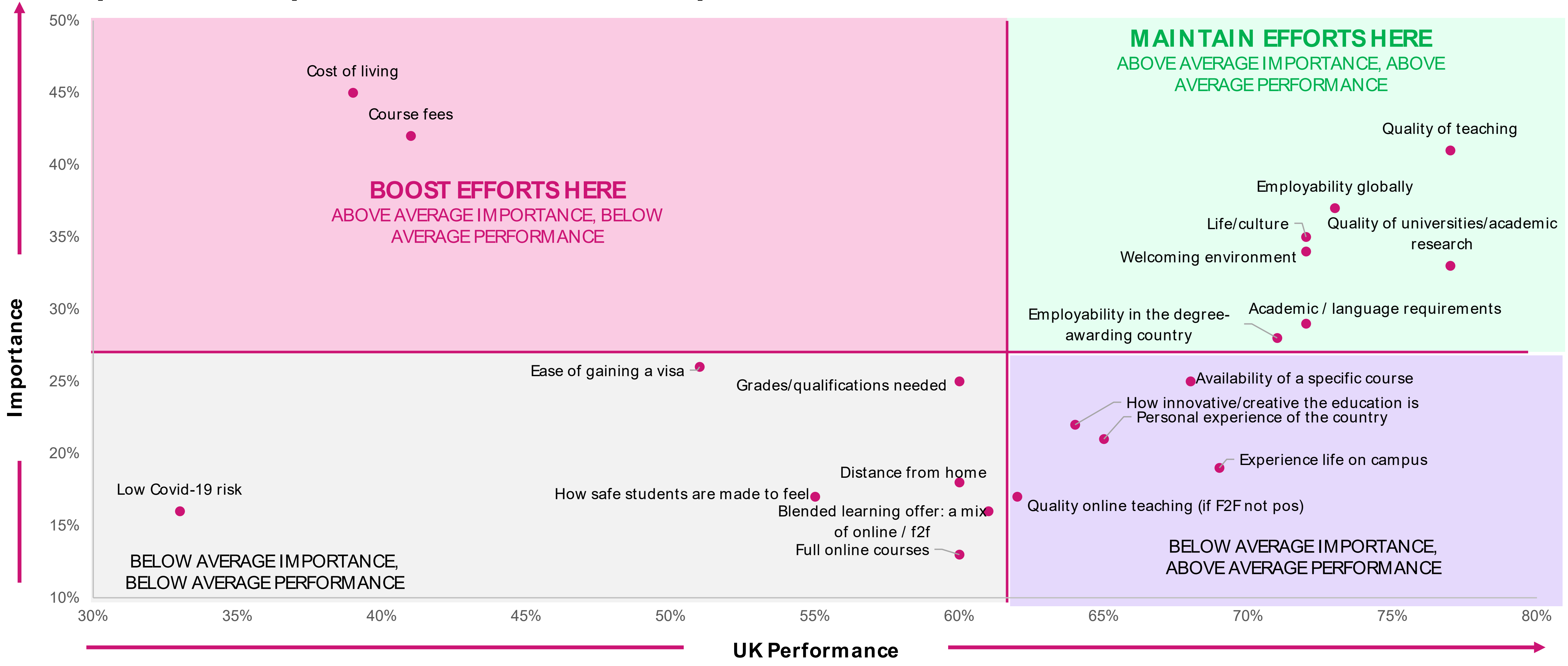


B3. T2B Summary - How would you rate the following countries for each of these when it comes to deciding to study there?
Base. UK (906), USA (906), Netherlands (233), Germany (673)

*Sig higher / lower vs. 2020 95% LOC*

# MESSAGING

## UK HE Providers should focus communications on the statements in the top of the map to make maximum impact



# BREXIT

What's the effect of Brexit?

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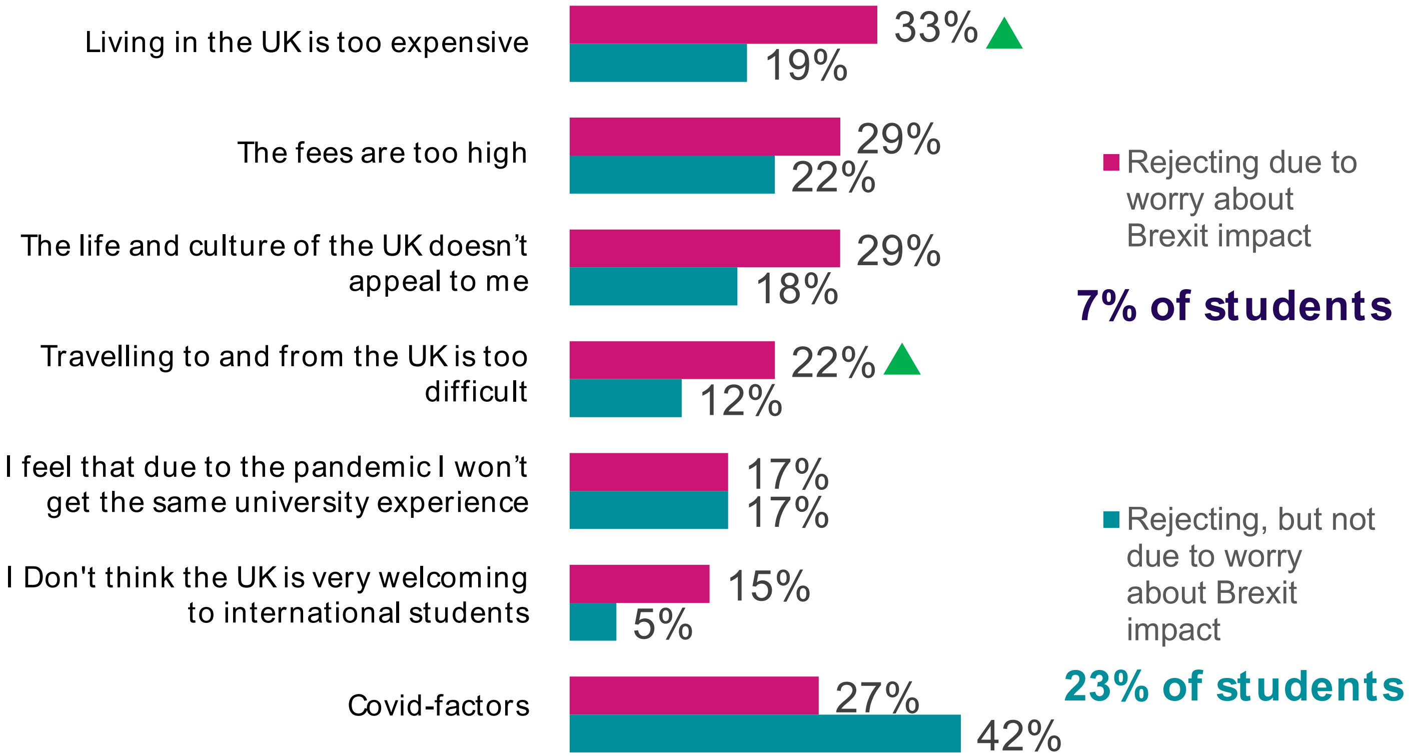
# THE COST OF BREXIT

## When Brexit is a reason for rejecting the UK, the foundation for rejection is commonly cost based – not only fees but living costs too

### Reasons for not considering the UK




**Average number of reasons for not studying in the UK:** 3.4 ▲ 2.2

Among those rejecting due to Brexit worries…

**Rejecting due to Brexit is now much less likely to be linked to a less appealing life and culture**

% rejecting because…

'UK life and culture doesn't appeal'

2020
**37%**
*#1 reason for rejection*

2021
**29%**
Joint #2 reason for rejection

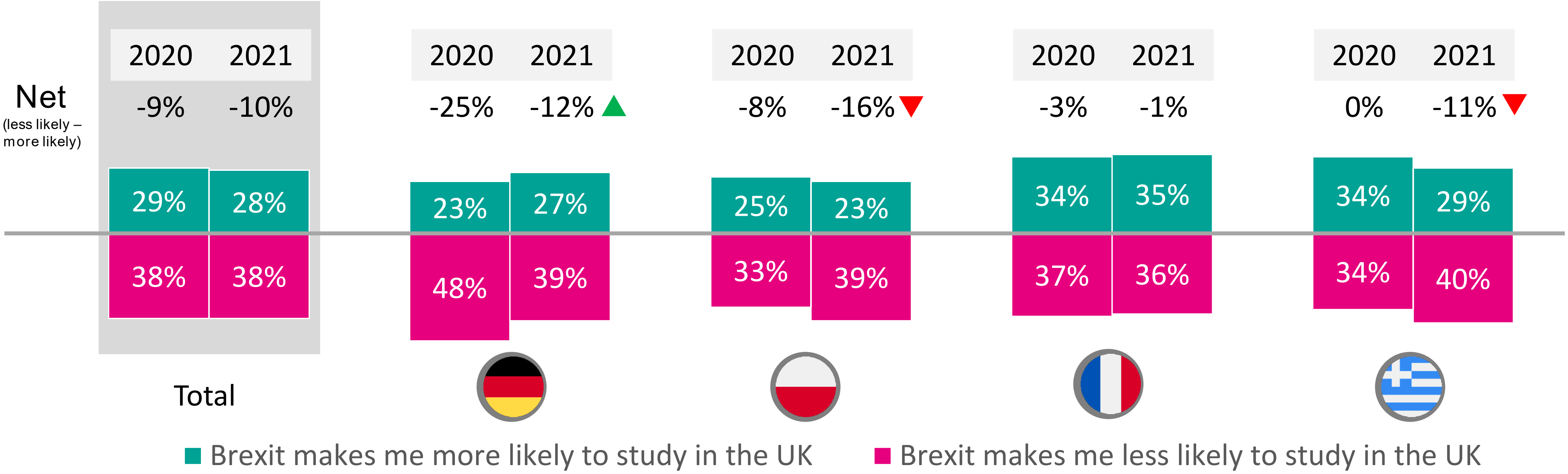
S3c You aren't currently considering studying in the UK. Why is this?
Base: Those not considering UK but not because of Brexit (203) Those not considering because of Brexit (61)

▲▼ *Sig higher / lower than 2020 95% LOC*

# IMPACT ON STUDY INTENTIONS

## While Brexit's impact on Germany is softening, it becomes more negative in Greece and Poland

### Impact of UK's exit from the EU on intention to study in the UK




Brexit continues to generally be viewed as negative, though this appears to be changing in some countries



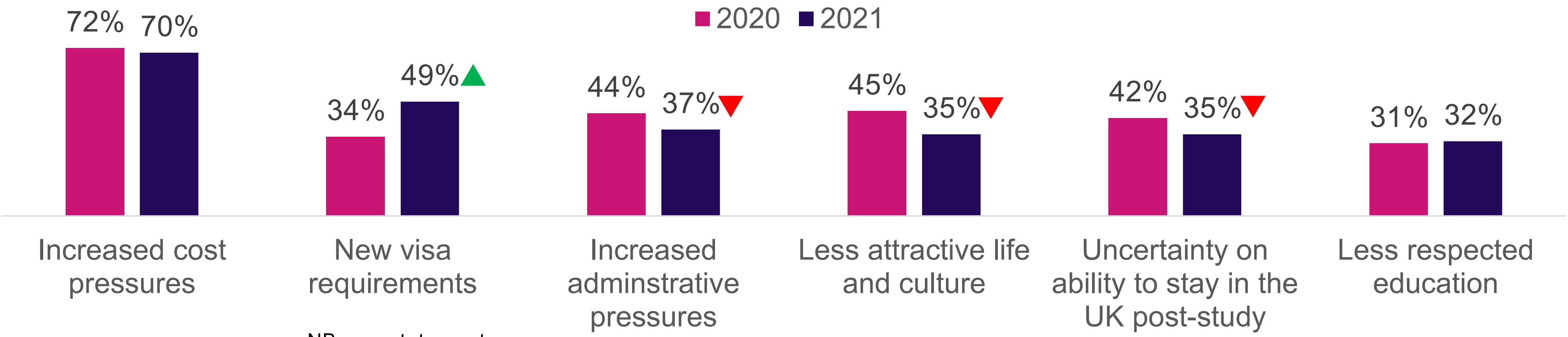
C2. Now that the UK has left the European Union, how, if at all, does the UK's exit from the EU (Brexit) affect your intention to study in the UK?
Base. Total Sample (906), France (228), Germany (233), Greece (216), Poland (229)

*Sig higher / lower than 2020 95% LOC*

# BREXIT CONCERNS

## While Brexit continues to lead to an array of concerns about studying in the UK, these are diminishing with time

### What are prospective students most concerned about post Brexit (NETS)?




NB: new statement added this year

=1st Top consideration when studying aboard

=5th biggest consideration when studying abroad

4th biggest consideration when studying abroad

3rd biggest consideration when studying abroad

Significantly higher



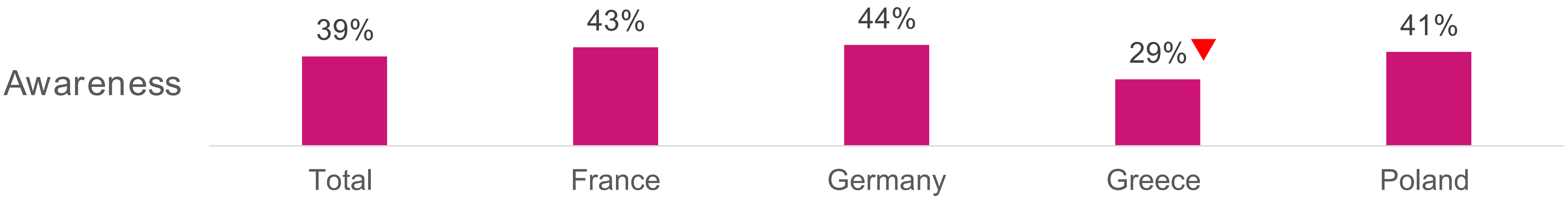
C4. Below are some concerns that some people may have about studying in the UK after Brexit. Which, if any, of the following would be a concern for you personally? B2New. Which of the following are important to you when deciding which country to study abroad in? Base. 2020 total sample excl. Spain (900), 2021 total Sample (906)

Sig higher / lower than 2020 95% LOC

# GRADUATE ROUTE

## Only 4 in 10 are aware of the new Graduate Route but 7 in 10 feel this would be relevant to them; room to boost awareness

### Awareness and Relevance of the Graduate Route




| Relevance (T2B) | Total | France | Germany | Greece | Poland |
|---|---|---|---|---|---|
| | 71% | 75% | 66% | 66% | 78% ▲ |

Important to drive awareness of the new Graduate Route, especially in Greece where knowledge is lowest. This could also help to overcome prevalent concerns around ability to stay in the UK post-study



H2B. In 2021, the UK will implement a new graduate immigration 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 immigration route before today? H2C. And how relevant is this graduate immigration route to you? Base. 2021 total Sample (906), France (228), Germany (233), Greece (216), Poland (229)

▲▼ Sig higher / lower than Total 95% LOC

# SUMMARY

# The UK maintains a strong position as a HE destination, despite unprecedented market changes

**The UK continues to be the most considered English-speaking market and prospective students recognise the quality of UK institutions, employability prospects and a positive Covid-19 response**

In the EU, the UK is still ahead of other markets for education quality and perceived future UK employment prospects. Positively, gains are made in these areas, along with being seen as more welcoming

However, consideration has decreased Y-o-Y (likely impacted by Covid-19/Brexit). Cost and global employment prospects remain inhibiting factors to considering the UK

**Covid-19 has had a significant impact on decision-making this year, but is not the most important thing for students when considering what's a priority for their study abroad experience**

Universities need to offer reassurances on Covid-19 policies as standard; despite these not being the important drivers in their decision, it is nevertheless information that they want to see from universities

**Campaign awareness in FR and DE is 59% and over half of recognisers attributed it to the UK**

However, the message take out was relatively low with no single clear message resonating ('amazing student experience', 'good place to study' and 'welcoming' are marginally ahead)

**Brexit continues to have a negative impact on intent to study in the UK, however this is reducing slightly**

Building awareness of The Graduate Route is an opportunity to overcome negativity, because it is seen as relevant

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