

EU prospective international students research

2023
Insights Report



Study aims and objectives

- Identify perceptions of the UK as a study abroad destination, including sources of information and market differences
 - How are perceptions changing post-pandemic?
 - What are the triggers and barriers to studying in the UK?
- Identify competitor perceptions and market differences
 - How do students feel about competitor country brands like Canada, Germany, Netherlands, and USA? How are these countries perceived in relation to the UK?
- Understand the impact of Brexit

Executive Summary

- Compared to 2022, **overall consideration of the UK** as a study destination **has improved** among EU prospective international students who are interested in pursuing higher education abroad in English, with a **six percentage point increase** in those who say the UK is their preferred study destination. Increases were particularly strong among considerers in Germany and France, with respective year-on-year increases of **10 percentage points** and **9 percentage points** in those identifying the UK as their preferred destination of study.
- This overall increase in the proportion who identify the UK as their first-choice study destination appears to be linked to **improved perceptions of the UK** in areas that are the most important to prospective students when choosing where to study, namely **quality of education and research, the availability of specific courses of interest, value for money, future employability, and offering a welcoming environment.**
- Despite the overall positive trend, the UK lost ground in terms of perceptions on factors such as **reasonable entry and visa requirements**, and particularly on **cost of day-to-day living and accommodation.**
- Given the strong perception of the UK regarding the most important choice factor – **quality of education**, supported by continued performance excellence in global university rankings, **comparison of UK HE with its closest competitor country on quality, the USA**, continues to make sense for the UK sector, given that comparable quality levels are obtainable to EU students at lower (if increasing) cost. Such messaging should continue to be supported by highlighting aspects such as **employability and access to professional networks**, to ensure that UK higher education continues to be seen as offering **good value for money.**
- In areas where perceptions of the UK lag behind those of competitor countries, our report highlights where and how the UK sector might best focus its messaging to counter misconceptions and improve clarity of information around aspects such as **offering a welcoming environment, food and dining out, cultural diversity and cost of living.**

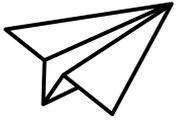
Sample specification

- Prospective students aged 16-25 years (50% of sample) or 25-34 years (50% of sample)
- Resident of one of the following countries: France, Germany, Greece, Italy, Poland, Spain
- Must be CONSIDERING studying abroad, in English, at a university / higher education institution in the UK, Ireland, USA, Australia, Canada or New Zealand in the next 3 years
- The qualitative sample includes a total of 10 students from all the markets

	Total Sample	France	Germany	Greece	Italy	Poland	Spain
Total Students	1,702	301	300	200	300	300	301

Section Content:

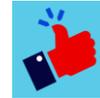
What should we communicate to prospective UK HE students from Europe, to encourage them to study in the UK?



9 key perceptions are associated with an increased or decreased chance of choosing the UK as an HE study destination



High quality of teaching and academic research



Has reasonable entry requirements



Offers the specific course I am interested in



The country has an attractive life and culture



Value for money of studying there



Reasonable cost of accommodation and daily living



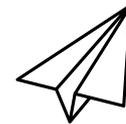
Offers good future employability globally



It is fairly easy to get a visa



The country offers a welcoming environment



The UK performs well on most of these important perceptions but has some notable weaknesses compared to competitors

	UK*	Difference vs Competitors^	Top Competitor
High quality of teaching and academic research	79%	+4	Japan
Offers the specific course I am interested in	73%	0	Germany
Value for money of studying there	65%	-3	Germany
Offers good future employability globally	79%	+3	Switzerland
The country offers a welcoming environment	64%	-11	Spain
Has reasonable entry requirements	62%	-3	Italy
The country has an attractive life and culture	68%	-7	Italy
Reasonable cost of accommodation and daily living	47%	-9	Spain
It is fairly easy to get a visa	54%	-9	Spain

↑
Increasing importance

Study UK

P25. How would you rate the following countries for each of these when it comes to deciding to study there? Please click on the scale(s) below to indicate your answer, where 1 = very poor and 5 = excellent. Base: Total sample (n=1702)

*Stating good or excellent

^ Percentage point change

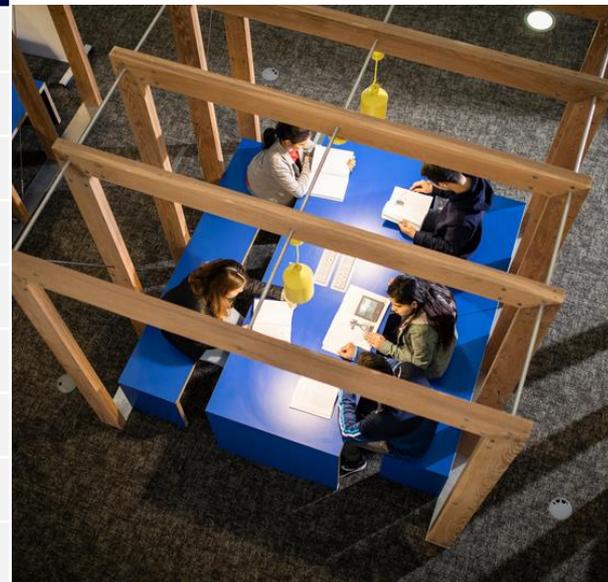
Competitive set includes: Australia, Canada, Denmark, France, Germany, Ireland, Italy, Japan, Netherlands, New Zealand, Spain, Sweden, Switzerland, USA



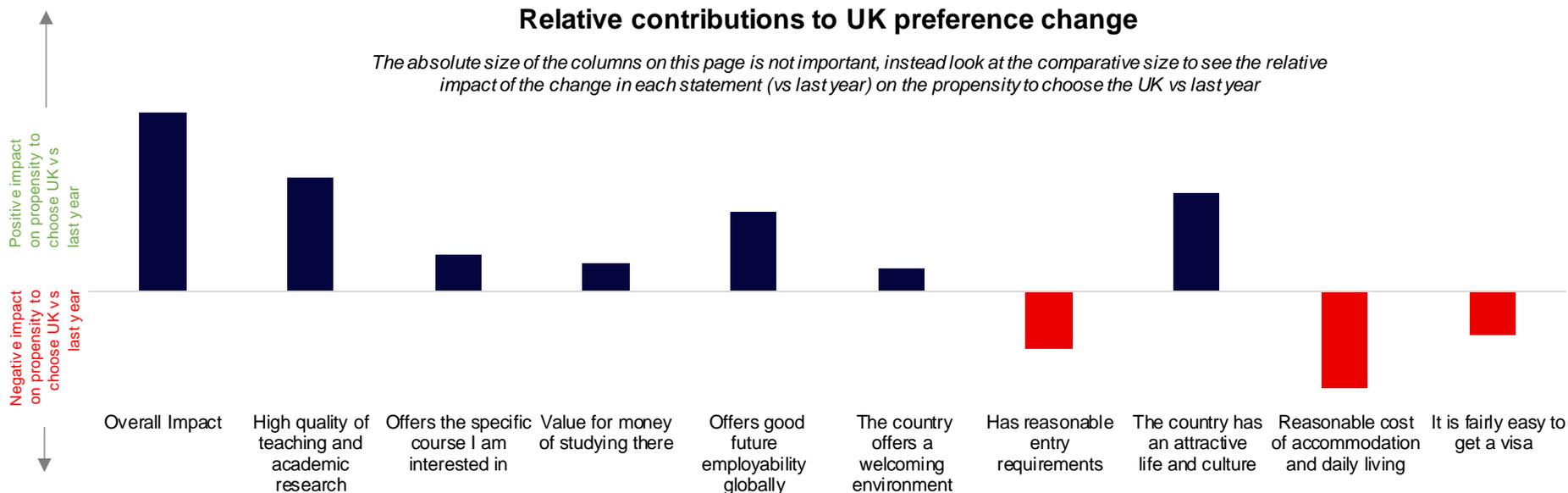
Progress has been made on many of these. However, on cost, entry requirements and access to visas, the UK has lost ground

	UK performance 2023 vs 2022 [^]
High quality of teaching and academic research	+3
Offers the specific course I am interested in	+1
Value for money of studying there	+1
Offers good future employability globally	+3
The country offers a welcoming environment	+1
Has reasonable entry requirements	-3
The country has an attractive life and culture	+5
Reasonable cost of accommodation and daily living	-6
It is fairly easy to get a visa	-3

↑
Increasing importance

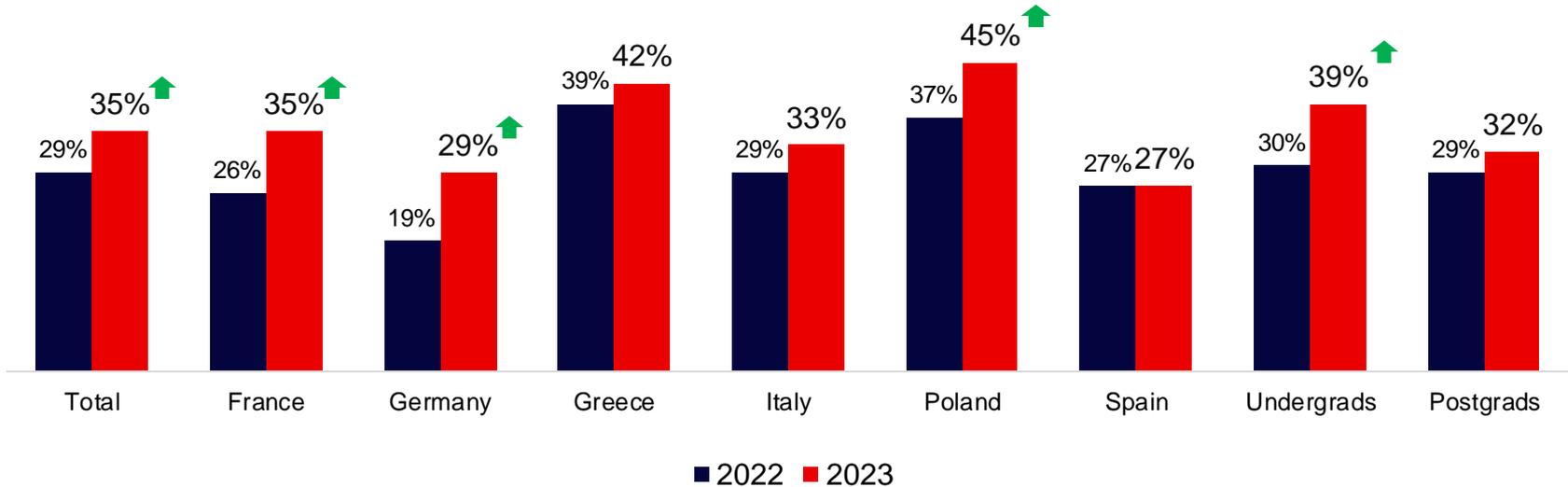


The UK's cumulative successes on the more important perceptions outweigh the loss on the less important

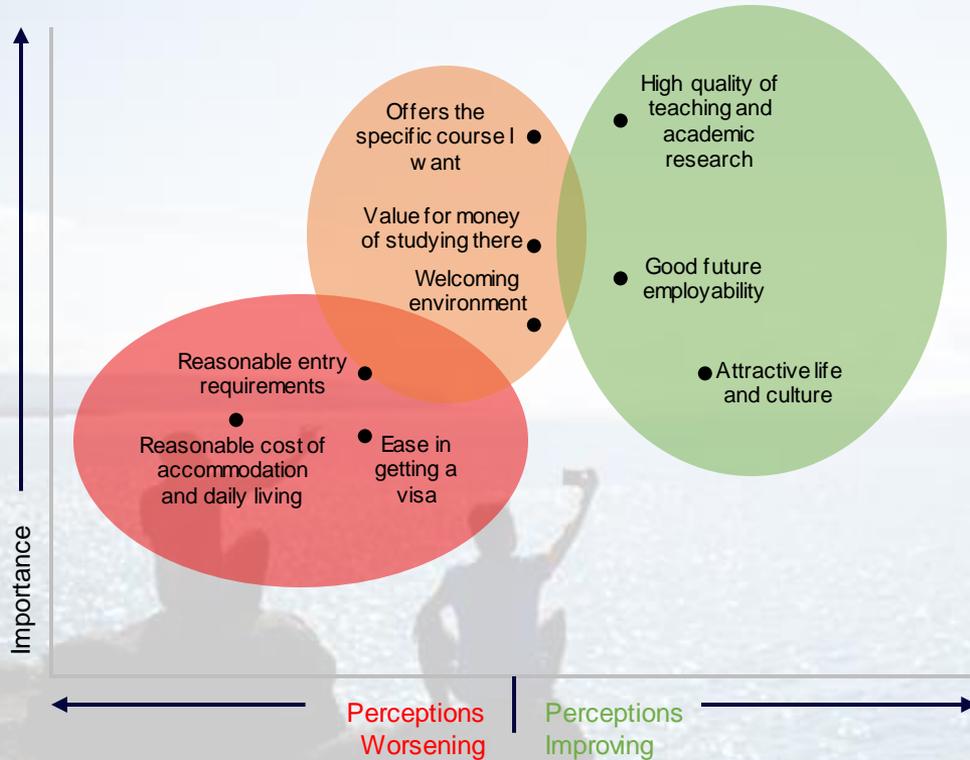


This has resulted in an overall increase in the proportion of considerers who identify the UK as their preferred destination

% Identifying the UK as first choice destination



Implications



23/24 Focus

Important and currently improving – Maintain focus

Important and stagnating – Small increase in focus needed

Less important but worsening – Large increase in focus needed but not at the expense of other categories

Section Content:

How to communicate
with prospective UK HE
students from Europe?

The whole sector has a role to play

- The higher education sector is made up of a large number of stakeholders and associated advisors
- To create meaningful change, consistency and clarity of messaging will be necessary
- The following slides serve as a guide to the conversations that the British Council, HEIs, and associated partners have with prospective students



Value for money – Tuition

Key learnings and takeaways

LEARNING

EU students appreciate that whilst a degree in the UK is expensive, it is worth it due to the high quality of education received in return

There is a perception the initial outlay would be paid back quicker by providing for a higher paid job opportunity, both in and out of the UK

The UK is seen as a hub of highly skilled, highly paid professionals – so the potential for networking is another benefit worth paying a higher tuition for

TAKEAWAY

Drive home the benefits that come exclusively from having a degree in the UK – focusing on the prestige of UK-based universities and the quality of education. When compared to the USA (the UK's closest competitor on quality), the UK is also considerably cheaper.

Whilst the word investment isn't used explicitly, EU students see it as just that. Highlight the increased employability offered by a UK-based degree, particularly within the UK

Make it clear there are countless talented and powerful professionals in the UK for students to network with and learn from

Those rejecting the UK based on lifestyle do so largely because of stereotypes that do not reflect the current reality

STEREOTYPE

The UK's reputation for relentlessly miserable weather remains a stumbling block for prospective EU students.

There remains a common and deep-rooted perception that the food and diet in the UK is of poor quality

There is a commonly held belief that the British are unfriendly, with some speaking from first-hand experience or the experience of people they know

Prospective EU students are discouraged by a perceived difference in culture to what they're used to

TAKEAWAYS

Highlight an alternative look at how wonderful a sunny day in the UK is, with an array of beaches and parks.

Highlight the incredible food options in across the UK, consider using well-known chefs and showcase cuisines from all over the world to reflect the UK's multicultural society.

Ensure that messaging shows the diverse and multi-cultural cities across the UK, where socialising is a keystone of life.

Showcasing a diverse population enjoying a variety of cultural pursuits in the UK should go a long way to making people feel like those from any culture background can come here and find like-minded individuals

Value for money – Living costs

Key learnings and takeaways

LEARNING

Cost of living is more of a concern than tuition, as the value is less clear. Cost of food and accommodation are the things prospective students are most concerned about

EU students expect the place that they study in to be, at most, marginally more expensive than where they currently live

TAKEAWAYS

Find a way to minimise uncertainty around the cost of accommodation and food – be that providing information to ensure clarity or disprove misperceptions, or highlighting the opportunity for part-time work whilst studying

Highlighting the cost of accommodation and food in different popular UK university areas and comparing them favourably with competitor destinations would be very impactful

Employability

Key learnings and takeaways

LEARNING

Employability is one of the most appealing elements to a UK degree, with many feeling it stands out on a CV

EU students want to work in the UK but feel it has become increasingly difficult. Studying in the UK is a route into a career in the UK.

Studying in the UK represents an opportunity to maximise prospective EU HE students' English-speaking capabilities

TAKEAWAYS

Drive home subsequent employment rates after a degree from the UK, or first job salary statistics that compare favourably with competitor destinations. This could be impactful in confirming what EU students already think.

Highlight the Graduate Route. Awareness of it is low but its relevance is high

Have current UK students from the EU showcasing their fluent English since enrolling

UK Culture

Key learnings and takeaways

LEARNING

The UK is renowned as a culture hub, with EU students expressing excitement at experiencing things like the music scene, theatres and museums

EU students see the UK as a progressive and multi-cultural place in which they will assimilate easily. A few do have an adverse view though, post-Brexit

Gastronomy in the UK leaves a lot to be desired in the minds of prospective EU HE students with many concerned they would find it hard to adapt to

TAKEAWAYS

The vast array of ways to keep entertained in the UK should be front and centre in all messaging as it's one of the main points of positive distinction. Making it more accessible cost-wise would be impactful too

Remind prospective EU students that the UK remains a progressive and comfortably multi-cultural place.

Drive home that this is an outdated view, highlighting the advances in recent decades, which has led to the current thriving food scene

Thank you

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