
Pathways and recruitment channels to undergraduate study in the UK

Analysis of the evolving international student recruitment landscape

June 2023

Table of Contents

1. Executive Summary	3
2. Introduction and methodology	5
3. Categorising recruitment channels and pathways.....	8
4. Scale and growth of recruitment channels	11
5. Key pathways and recruitment channels to international undergraduate study in the UK	14
5.1 UK independent schools and further education colleges	14
5.2 Pathway providers.....	16
5.3 Transnational entrants and UK TNE partnerships.....	17
5.4 International schools	18
5.5 Students supported by agents	19
5.6 Individual applicants	22
5.7 Other channels influencing students	22
5.8 Overlapping of recruitment channels	24
6. Implications and next steps	25
Appendix 1: Available data on student recruitment channels and data gaps	26

1. Executive Summary

The ecosystem for undergraduate international student recruitment is crowded and complex, with many potential pathways for overseas students to enter UK higher education (HE). The diversity of channels can create confusion among students who want to understand how to source trustworthy information. Institutions also need a strong understanding of different channels when it comes to deciding on where to invest their scarce resources in meeting increased, and often ambitious, international student recruitment targets. There has been an increase in the number of organisations involved in bringing a student to the UK, which has increased the overall cost of acquisition of international students for UK universities.

This report provides a pioneering overview of the different channels through which international students enter UK undergraduate education. Gaps in currently available data make it difficult to obtain an accurate picture of the relative scale of each of these channels. However, it is possible to gain some insight into trends in recruitment channels by analysing data on undergraduate applicants via UCAS apply centres in the UK and overseas.

In 2021/22, Almost half (46 per cent) of all applicants submitted **individual applications** directly through UCAS's online system, but many of these students were likely advised by agents or school counsellors.

Around 31 per cent of applicants came from overseas schools, typically English-medium international schools.

Meanwhile 12 per cent of applicants applied through agents, while around 6 per cent of non-UK domiciled applicants applied through schools or further education colleges in the UK and a further 4 per cent were studying at UK pathway programmes. However, the number of students passing through pathway providers is believed to be far higher than the applicants that appear in UCAS statistics, due to direct links between

pathway providers and higher education institutions, which means that students can transfer to universities outside of the UCAS system.

It is important to note that channels described in this report are not always mutually exclusive – aside from agents advising students who apply through another channel they could also interact in other ways, for example a student progressing to UK HE study via a private pathway provider may have previously studied at an international school in their home country.

Over time there has been a gradual increase in the proportion of undergraduate applicants applying through **overseas schools**, highlighting the importance of engaging with international schools abroad. However, students at UK-curriculum schools abroad do not necessarily go on to HE study in the UK, and many students instead apply to study in other countries such as the US, Australia, Germany and the Netherlands. Conversely, English medium international schools teaching a non-UK curriculum can also be important sources of students for UK universities. Ed-Tech services have been developed to support counsellors in international schools, but further support is needed to help counsellors and their students understand the benefits and value of studying in the UK.

Agents have invested in technology in recent years to better serve their clients (both students and universities). **Agent Aggregators** - consisting of third-party organisations that centralise management of recruitment agents digitally for UK higher education institutions - are a concern for several of the stakeholders interviewed, with one of the main issues being the need to appropriately filter and qualify applicants. At the same time, they are believed to help universities increase their market reach, with positive effects on recruitment and student diversity on campus.

Private pathway providers are a key

stakeholder in the ecosystem, providing global reach, market intelligence and agility in product development. However, government policies and university's perceptions of them have not always been favourable. Expansion of their portfolio has seen growing overlap between their activities and the activities of an international office at a university. Some UK universities offer their own **in-house pathway / foundation programmes**. However, data from UCAS and HESA shows a decline in the significance of in-house programmes as recruitment channels in recent years.

The **further education** sector's international student population has contracted substantially since 2010, which has been attributed to tighter restrictions on work rights for students at these institutions. That said, based on a survey conducted by the Association of Colleges in 2020, there has been a notable increase in the proportion UK FE colleges adopting a more strategic approach to their international activities.

Feedback from interviews suggest that there is a need for more targeted events for **independent schools based in the UK**, such as bespoke recruitment fairs; and for additional help for students in the form of English language support and helping to smooth the transition from school

to university.

For the UK to strengthen its position as the second most popular study destination for international students in the world, there needs to be more support provided to the key stakeholders in the ecosystem to improve integration across the different levels of education in the UK.

Peer-to-peer influencers are cited during interviews as being the most important when converting international undergraduate students. These stakeholders need to work and evolve together in this new international undergraduate student recruitment environment and the British Council has a leading role to play on these integration and collaboration activities.

The research carried out as part of this report can help UK higher education institutions and other stakeholders to better understand these different recruitment channels, including their scale, recent trends, and relevant concerns. It also suggests that there is a need for more comprehensive data on this topic and better coordination between data sources. Further investigation into the opportunities and challenges for each channel would provide insight into how best to develop, support and leverage / grow those channels.

2. Introduction and methodology

This report examines the main recruitment channels and pathways to UK higher education (HE) for international undergraduate students.

While there are a diverse set of pathway options available to international students seeking to study in the UK, there is a lack of clarity - particularly for the students themselves - on how best to navigate this process. The role of agents, and their relationship to both students and institutions, is discussed in this report. Although the direct application route (absent support from an agency) is very much still a recognised route to UK HE, agents, agent aggregators and Ed-Tech companies are playing an increasingly dominant role in the recruitment process.

Throughout the process of compiling data for this report, the issue of gaps in available data has continuously been raised. This reality is both recognised and acknowledged by the project team as a clear reality and constraint. In addition to providing data to the greatest extent possible, the report also seeks to both identify the gaps and provide recommendations to address them.

Research involved both quantitative and qualitative approaches. Quantitative aspects of the report looked at key data sources where they were available, which included data from sector bodies including the Universities and Colleges Admissions Service (UCAS), Higher Education Statistics Agency (HESA), the Independent

Schools Council (ISC) and the private pathway provider alliance Destination for Education, as well as government statistics from the Office for National Statistics (ONS) and visa data from the Home Office.

A key data source, used for analysis of the scale of each pathway, was a bespoke request for UCAS data with details of applicants and accepted applicants by region of domicile and Apply Centre. This data was analysed to divide the list of apply centres into key categories, such as agents, overseas schools, UK independent schools, pathway providers and individual applicants, to understand the proportion of non-UK domiciled students entering UK undergraduate courses through each route.¹

In addition to data-based analysis, qualitative analysis was also undertaken. This included a review of 37 reports and publications, as well as 42 individual interviews with key subject matter experts from across the different recruitment channels of focus. This included higher education institution (HEI) representatives, recruitment agents, international schools, private pathway providers, national education agencies and Ed-Tech companies. Four focus groups were conducted with key stakeholder organisations including British Council regional representatives who support the recruitment of international undergraduate students to the UK.

¹ The definition of “non-UK domiciled” also includes people who have been living in the UK but whose main purpose of residence is to receive full-time education. This means that applicants applying to enter UK university via boarding schools or pathway providers in the UK may still be counted as non-UK domiciled for the purposes of this report.

Figure 1: Individual interviews conducted

Type of organisation	Number interviewed	Details
HEI representatives	10	<ul style="list-style-type: none"> • Directors of International Offices x8 • PVC-International x2 (Includes five Russell Group institutions)
International and Independent Schools	10	<ul style="list-style-type: none"> • HQ of International Schools x9 (includes 2 based in the UK) • HQ of the IB schools (global cover) x1 Regional coverage: Southeast Asia x2, China x2, North America x1, South America x1 and Middle East x1.
Recruitment Agents	9	Seven agents have multiple offices in multiple countries and two have multiple offices in the same country. Regional coverage: Africa, Americas, UK, Asia, Europe and Middle East.
Private Pathway Providers	7	HQs of private pathway providers; interviews conducted with executive level members and directors of global marketing.
National Education Agencies	4	Country coverage: Australia, Canada, Malaysia, Netherlands.
Ed-Tech companies	2	One with HQ in the UK and office in India; one with HQ outside UK and office in the UK.

Organisations represented in focus groups included: British Universities' International Liaison Association (BUILA), Universities UK International (UUKi), Ecctis, Independent HE, Council of British International Schools (COBIS), British Association of Independent Schools with International Students (BAISIS), and British

Council regional representatives from EU, South Asia, Americas and Wider Europe.

Given the nature of data collected, the interviewees were guaranteed anonymity and all findings were presented in the aggregate, to ensure ethical practice was upheld.

Editorial team

The British Council commissioned The IC Global Partnership to deliver this research project.² All the interviews and most of the desk research and data analysis was conducted by the IC team. The British Council played an active support role in arranging interviews, sourcing data and providing feedback on report drafts. Details of project team participants are provided as follows:

British Council

- Jacqui Jenkins - Global Programme Lead, International Student Mobility and Marketing
- John McNamara - Global Head of Research, Education Insight Hubs
- Kevin Prest - Senior Analyst, Education Insight Hubs

The IC Global Partnership

- Charlene Allen - Co-Founder and Director of The IC Global Partnership
- Sirin Myles - Co-Founder and Director of The IC Global Partnership
- Christopher Hill - Professor Faculty of Education, The British University in Dubai

Independent external advisor

- Janet Ilieva - Founder and Director of Education Insight, International Education Consultancy³
-

² www.theicglobal.com/

³ www.educationinsight.uk/

3. Categorising recruitment channels and pathways

International students access UK undergraduate education through a diverse set of entry points. Although individual applications into the UCAS system are very much still a recognised route to UK HE, agents – along with associated players such as agent aggregators and Ed-Tech companies – play an important role in the recruitment process for many applicants, while many other students will have studied at an international-curriculum school or on a UK transnational education (TNE) programme in their home country. Others may have studied in the UK before entering HE, either at an independent school or further education (FE) college or on a pathway programme aimed to prepare international students for university study in the UK.

It is important to note the nomenclature used in the field of international HE. Key terms, such as pathways and channels are often used interchangeably. While “pathway” sometimes refers to a course taken prior to university admission (generally in the form of language development, preparation or qualification), the term is often used more broadly to refer to the route taken by a student to university admission.

When categorising recruitment channels for international students, one key division is between students directly entering UK HE programmes from abroad and those coming from previous study within the UK.

While the majority of international students in the UK are studying HE programmes, a substantial percentage of these students choose to come to the UK at an earlier stage and study at independent schools or FE colleges. These students are relatively easy to track, as they typically apply through the UCAS system via their schools – although it should be noted that some non-UK-domiciled students do apply to UK HE through UCAS’s online system from within the UK.

Another group of students with previous UK study experience are those who have studied pathway

or foundation programmes – a term that refers to programmes intended to prepare students for UK HE, typically after completing a high school programme abroad. Pathway programmes are offered by both UK universities and by private providers specialising in this type of study, who often work closely with HEIs.

Students entering UK HEIs directly from abroad can also be divided into several groups. One of these groups is transnational entrants, including students articulating to the UK through transnational education partnerships and those that come through articulation or credit recognition agreements with overseas HEIs, who often enter later years of a degree programme rather than joining in Year 1. Another group of students entering in later years of the course is those who have previously completed a sub-degree HE qualification similar to the UK’s Certificate / HNC or Diploma / HND courses.

Meanwhile, students entering UK HE immediately after completing high school abroad can be further divided into those who have studied a UK or other international curriculum – such as A-levels or the International Baccalaureate – and those who have studied local courses. The former group are concentrated at international schools who often have experience in supporting their students’ entry into universities in the UK and other education destinations, while the latter category generally receives less support from their school (although exceptions do exist, especially in countries with a similar education system to that of the UK).

Many international students coming to the UK are supported by education agents, who help to provide relevant information and advice on application materials and provide various kinds of logistical support. As well as working with applicants overseas planning to transition directly into UK HE, agents also overlap with other application channels and can advise students who apply to UK universities through their school or another pathway, or even those who are already in the UK. Agent aggregators – third party

organisations that centralise, manage and provide a network of recruitment agents for UK HEIs, often through a digital platform / hub – are playing an increasingly important role here.

Finally, sponsor organisations and UK universities' summer programmes often occupy

an important position in students' pathways towards UK undergraduate education.

Figure 2 below provides a summary of these different categories. More information on each category – including the ways in which it overlaps with other listed categories – is provided in Section 5.

Figure 2: International student recruitment channels

International Student Recruitment Channel		Description
Entrants coming from previous study in the UK	UK independent schools and FE colleges	Schools and colleges in the UK, teaching in English and offering qualifications that prepare students for UK HE.
	Pathway providers	Third-party organisations delivering foundation programmes for students who don't qualify for year 1 undergraduate study in a UK HEI, or programmes such as "International Year One" that allow students to transfer into later years of the course. Some UK universities also recruit international students to their own internal foundation / pathway programmes.
Applicants joining courses from overseas	Pathway providers	As above, with students undertaking the foundation programmes in their home country.

	Transnational entrants	<p>Includes three categories - students who studied part of a UK degree course overseas at a branch campus or partner institution; students transferring from an overseas HEI through an articulation / credit recognition agreement; and students entering UK HE courses after completing a sub-degree qualification overseas.</p> <p>Data limitations make it difficult to distinguish between these three groups.</p>
	International schools	Overseas schools teaching English-medium programmes and offering qualifications that prepare students for UK HE.
	Students supported by agents	<p>Students applying to UK HEIs with support from an agent.</p> <p>Agent aggregators are becoming an increasingly important part of this ecosystem.</p>
	Individual applicants	Students applying to UK HEIs as individuals and not through an agency or organisation.
Other channels influencing students	Sponsors	Overseas organisations, typically government bodies, funding students via scholarships or grants to study in the UK.
	Summer schools and short-term courses	In-house summer school or non-credit bearing short courses delivered by UK HEIs as “taster” courses for undergraduate study.

4. Scale and growth of recruitment channels

Gaps in currently available data make it difficult to obtain an accurate picture of the relative scale of each recruitment channel. In particular, students transferring to UK HEIs via TNE partnerships or through credit recognition or articulation agreements with overseas universities are generally not captured in UCAS application data. Meanwhile interviews with private pathway providers conducted as part of this research show that the number of students entering HEIs through these providers is significantly higher than the 5,290 applicants that appear in UCAS statistics in 2021/22, due to direct applications made outside of the UCAS system. Nevertheless, it is possible to gain some insight into trends in recruitment channels by analysing data on undergraduate applicants by UCAS apply centre.

Dividing apply centres into separate categories shows that almost half of non-UK domiciled students entering UK HE through the UCAS system make individual applications directly through UCAS's online system, making this the largest single channel – although this category may also include students who are supported by an agent or attending an international school abroad that is not registered as a UCAS apply centre.

The next largest group of applicants is students applying via overseas schools – typically international schools that offer a UK or other English-medium curriculum. This group accounted for 31 per cent of all applicants in

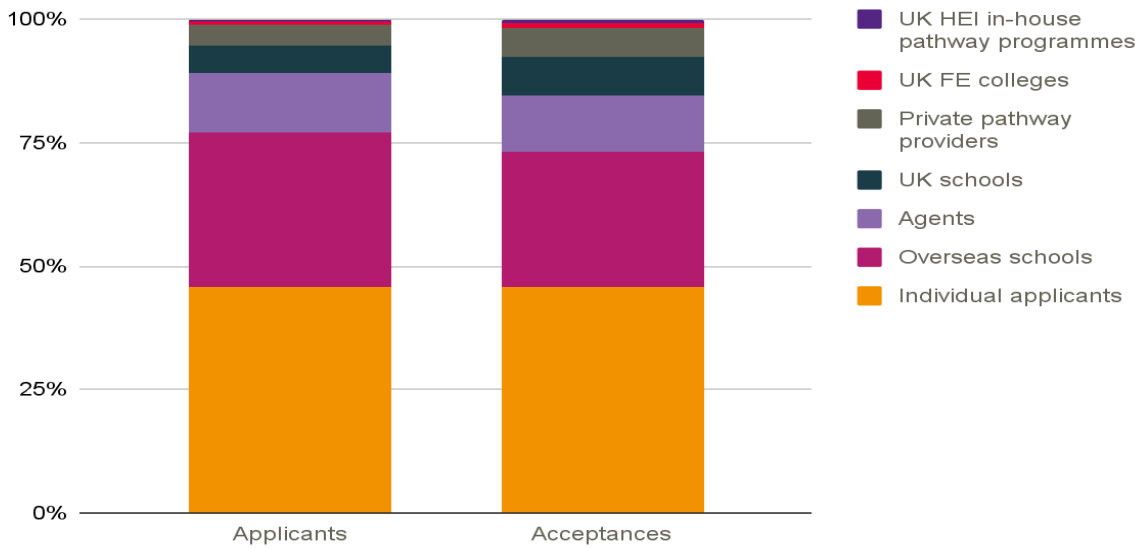
2021/22, but made up a slightly lower proportion of accepted applicants (27 per cent).

Agents were the third largest group, accounting for 12 per cent of both applicants and acceptances. This proportion is substantially below estimates of the proportion of students supported by agents based on survey research. The difference is likely because the figure only accounts for those whose UCAS application was submitted through their agent as the apply centre, meaning that a large number of agent-supported students are instead categorised as individual applicants.

Meanwhile UK-based schools and FE colleges accounted for a total of 6 per cent of non-UK domiciled applicants, with independent schools accounting for the large bulk of these students. This translated into a higher proportion of accepted applicants (9 per cent), probably because these students have a firm connection to the UK and are less likely to have also applied to universities in other countries.

Finally, around 4 per cent of non-UK applicants in 2020/21 submitted their UCAS application through a foundation provider or UK HEI pathway programme, rising to around 6 per cent of all acceptances. As noted above, this figure likely underestimates the total trend as many students transition directly to a linked degree course rather than making an application through the UCAS system.

Figure 3: Non-UK undergraduate applicants and acceptances by apply centre type, 2021



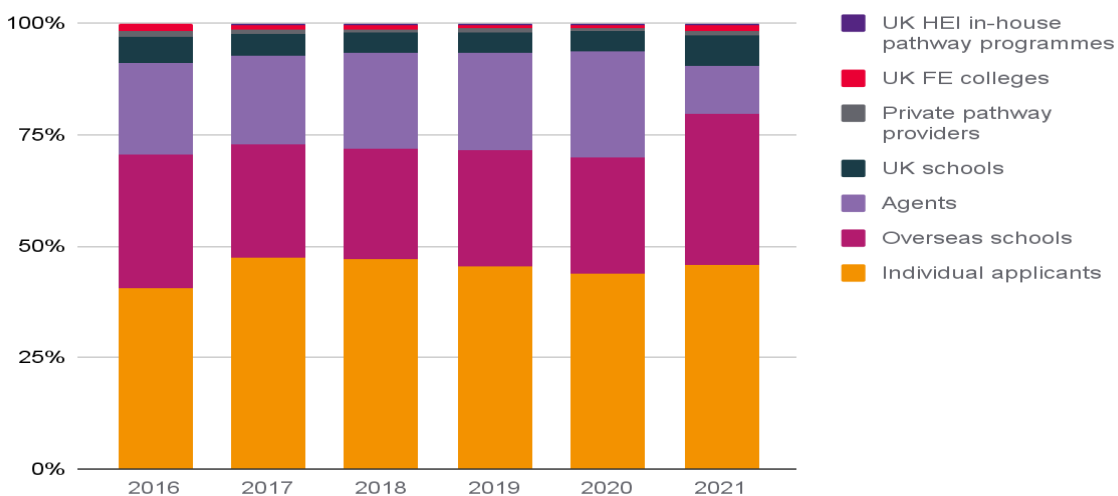
Source: UCAS

Compared to previous years, the 2021/22 entry cycle saw some notable shifts in recruitment channel proportions – particularly among EU students who were affected by post-Brexit changes to undergraduate fees and financial support. While there was a drop in the absolute number of EU students applying through each of the channels listed above, the decline in agent-supported students was particularly sharp, leading to the proportion of EU students recruited via agents to drop from 24 to 11 per cent of

applicants in this region. Meanwhile there was a relative increase in the proportion of applicants coming through other channels, especially UK schools and FE colleges and to a lesser extent pathway providers and overseas schools.

This is a notable change to trends in previous years, when agent applicants from EU students had been rising while the strongest declines were in applications through FE colleges and universities’ in-house pathway programmes.

Figure 4: EU undergraduate applicants by apply centre type, 2016-2021



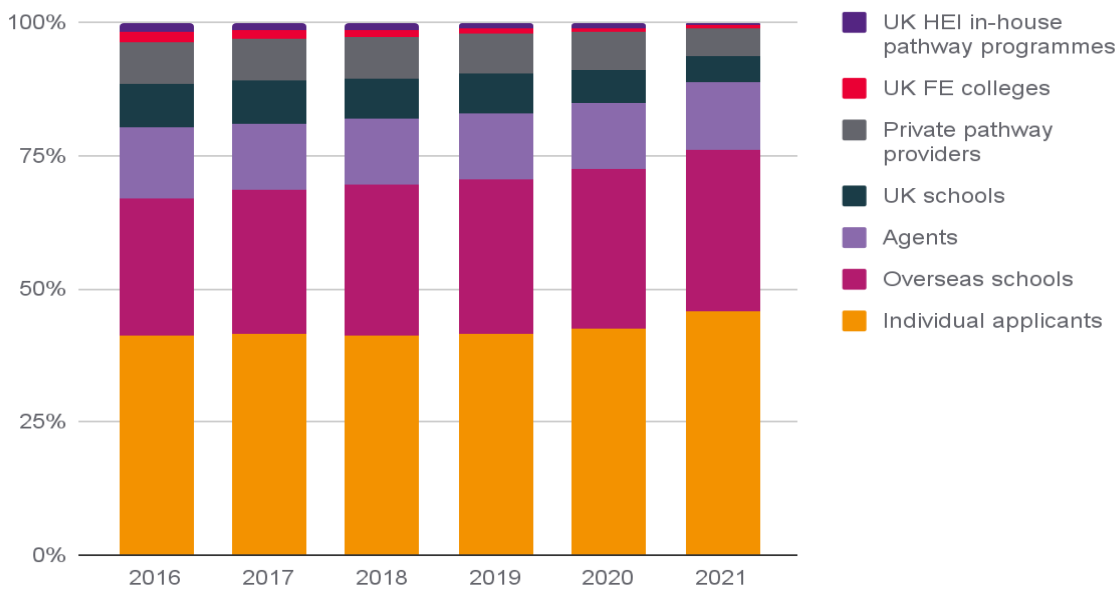
Source: UCAS

The trend in non-EU countries was more stable with ongoing growth in student numbers despite the pandemic, probably thanks to students attracted by the newly introduced Graduate Route visa stream. Over the last five years the proportion of students applying through overseas schools has risen with a corresponding drop in

the proportion of non-EU students applying from schools and FE colleges in the UK.

As with EU students prior to 2021, there has also been a sustained decline in non-EU applicants applying from UK FE colleges and through UK HEIs' in-house pathway programmes throughout this period.

Figure 5: Non-EU undergraduate applicants by apply centre type, 2016-2021



Source: UCAS

5. Key pathways and recruitment channels to international undergraduate study in the UK

Interviews were conducted with representatives from a variety of different organisations and institutions, to better understand how they contribute to the UK's international undergraduate student population and how they interact with other players in this sector.

Recruitment channels are discussed in the following sections in the same order as they appear in Figure 2.

5.1 UK independent schools and further education colleges

UK independent schools

In the 2021/22 academic year there were slightly over 25,000 non-UK pupils with parents overseas studying at UK independent schools – a slight increase over 2020/21, although still around 15 per cent below the pre-pandemic figure. As might be expected, most of these students are studying at boarding schools.^{4,5}

Data from UCAS shows that slightly over 5 per cent of non-UK domiciled students applying to UK HEIs applied through UK independent schools in 2021. Although the number of international students entering UK HE through independent schools in the UK is relatively low compared to some other channels, this still represents a key recruitment channel. As students are already in the UK they are more likely to choose UK universities for their HE study, while their previous exposure to UK education helps to ensure that they are well prepared to study a HE course and have strong English language skills. This is reflected in this channels' comparatively higher share of non-UK student acceptances, which stands at almost 8 per cent.

One major reason for families to send their children abroad at the school level is to help prepare them for UK university study.

Aside from traditional qualifications such as A-levels or the International Baccalaureate (IB), there are an increasing number of foundation programmes being offered by independent schools and boarding schools in the UK that includes collaborating with foundation programme providers, a university's in-house foundation programme and/or university pathway consortiums.

Primary interviews and research from independent schools, announced at the Boarding Schools Association (BSA) 2022 conference, show that there is a need for schools and universities to adopt a new approach of working together to include greater integration, synergy, qualification recognition and support to international students already in the UK to ensure they succeed in UK HE.

Interviewees believe that there is a demand for more targeted events, such as a bespoke recruitment fairs for UK based international students, as well as ensuring greater dialogue and collaboration between teachers, counsellors, students and parents. There is also a need for additional help for some of these students in the

⁴ Independent Schools Council, Jan 2022, *ISC Census and Annual Report 2022* www.isc.co.uk/research/annual-census/

⁵ The referenced figure refers to “non-British pupils with parents abroad”. The ISC report also gives a separate figure for total non-British pupils – many of whom attend day schools – but most students in the latter group would not be classed as international (non-UK domiciled) students as they are resident in the UK for purposes other than education.

form of English language support or help smoothing the transition from school to university.

International students at UK schools generally apply to UK HEIs through their school and generally have little overlap with other

UK further education colleges

In addition to schools, international students also study in UK FE and sixth form colleges before entering HE in the UK. Detailed data is not available, but according to the UK's Department for Education (DfE) estimates the FE sector contributed around 1.3 per cent of the UK's £23 billion education exports in 2019.⁶ Statistics from UCAS show that 1.0 per cent of non-UK acceptances to UK HEIs in 2021 came from students studying at FE colleges in the UK – down from 1.7 per cent in 2016.

Anecdotal evidence from FE institutions suggests that a large proportion of these students are studying A-level qualifications in preparation for entering a university in the UK. Another key element of FE colleges' international student recruitment is the offering of English Language Training courses as this offers a scalable source of income and a possible foundation from which to develop other recruitment streams. These colleges work with recruitment agents, the English to Speakers of Other Languages (ESOL) / English Language Teaching (ELT) sector and several colleges have partnerships in place. The partnership models include students coming for a short period of time as a taster programme for A levels, a summer school in collaboration with an ESOL / ELT provider, or a sandwich year as part of their A level studies, in their senior high school years. These partnerships were often with

recruitment channels such as agents or pathway providers – although it is possible that some students do receive advice or support on their applications from agents, and a significant proportion have previously worked with agents when entering their UK boarding school.

European institutions, which has been made more difficult since EU students have required a visa to study the UK. To obtain a visa, students need to be completing a recognised qualification i.e., sitting the A-level exams, which was not typically the purpose of the partnership.

The FE sector's international student population has contracted substantially since 2010, which has been attributed to tighter restrictions on work rights for students at these institutions. The most recent statistics show further reductions in international students coming to UK FE colleges.

That said, based on a survey conducted by the Association of Colleges (AoC) in 2020, there has been a notable increase in the proportion UK FE colleges adopting a more strategic approach to their international activities.⁷ The top two forms of international activity amongst AoC members are Erasmus+ and international student recruitment - both with over 70 per cent of respondents involved. Online training as a form of international activity quadrupled from 2019 to 2020, representing a business model change.

Although the number of students starting their UK HE study via FE colleges is relatively low, it represents a steady feeder system for HEIs and as such should form part of any overall recruitment strategy

⁶ Department for Education, Dec 2021, *UK revenue from education related exports and transnational education 2019* www.gov.uk/government/statistics/uk-revenue-from-education-related-exports-and-tne-activity-2019

⁷⁷ Association of Colleges, 2021, *International Activity in Colleges: The 2020 Association of Colleges Survey* <https://d4hfzltwt4wv7.cloudfront.net/uploads/files/AoC-International-Survey-Report-2020.pdf>

5.2 Pathway providers

Private pathway providers in the UK recruit overseas students to study a course intended to prepare them to enter UK HE. Statistics on the number of students on these programmes are not publicly available, but discussions with representative from within the sector show that the number of students passing through this channel into UK HEIs is significantly higher than the 5,290 applicants that appear in UCAS statistics in 2021/22. This is largely due to direct links between pathway providers and HEIs, which means that students can transfer to universities outside of the UCAS system.

The service offering of private pathway providers has evolved in the last decade, accelerating during the Covid-19 pandemic. The offer originally started with providing foundation programmes to students who completed 12 years of education but who required 13 in total to align with the UK education system. While there are some exceptions, such as Singapore, USA and China, in general secondary education qualifications in many countries are not considered eligible for access to UK education at the undergraduate degree level. Interview responses, in aggregate, highlight that private pathway providers are a key stakeholder in the ecosystem, providing global reach, market intelligence and agility in product development which is often not achievable by UK universities. Despite this value, government policies and university's perceptions of them have not always been favourable.

Private pathway providers have had to evolve their portfolios mainly due to two shifts in the sector:

1. Universities have revised their entry qualifications over the years to allow students with high grades, who would traditionally require a foundation programme, to directly access undergraduate degrees.

2. Increased competition, both nationally in the UK and globally, for international undergraduate student recruitment.

In response to these changes, the pathway providers have introduced new pathway programmes to access years 1, 2 and in some cases 3 of an undergraduate degree, as well as providing additional admissions and enquiry services to support a university's international student recruitment ambitions. This expansion of portfolio has further seen the overlap between the activities of a pathway provider and the activities of an international office or team at a university with the possibility of universities looking to outsource part, or all, of their international student recruitment to private pathway providers.

Some universities also offer their own in-house pathway programmes. In many cases students are recruited to a foundation course and then continue onto a full undergraduate degree at the same institution, but some students go on to apply to degree programmes at other institutions through UCAS after completing these courses. Data from UCAS and HESA shows that the scale of in-house foundation programmes is substantially smaller than the number of students studying these programmes at external providers.

Agents are key influencers for students applying to pathway providers. At a later stage, the transition from a pathway provider to a UK undergraduate programme is less likely to involve a third-party agent, usually happening through direct connections between the pathway provider and the university; however, this is not always the case and some students also engage an agent at this stage.

5.3 Transnational entrants and UK TNE partnerships

Transnational entrants to UK undergraduate education can be divided into three broad groups:

- Students who studied part of a UK TNE programme abroad. This includes students transferring as part of a UK degree studied at an international branch campus, students studying joint degree programmes delivered in conjunction with an overseas provider, and those enrolled on a UK course delivered by a validated overseas partner.
- Students undertaking a local degree course overseas at an institution which has links with UK HEIs in the form of articulation agreements or credit recognition.
- Students admitted to a UK course in the UK with a sub-degree qualification earned overseas – for example China’s higher vocational “zhuanke” diploma.

There is little direct data on this form of student mobility. Statistics from HESA track the number of students entering UK HE programmes in Year 2 of the course or later, most of whom will be transferring from overseas HE courses. However, this method is not perfect as these statistics would also include students transferring to a university after completing an International Year One programme at a private pathway provider, while it would fail to capture students on “1+3” TNE partnerships that allow students to transfer into Year 1 of a UK degree. There is also no way to distinguish between students transferring from a UK TNE programme and students transferring through an articulation agreement or credit recognition.

Transnational entrants represent a notable source of international students for the UK. Joint research from the British Council and Universities UK International shows that, in 2018/19, more than 15,000 international students started a degree course in Year 2 or later of the programme without having previously studied in a UK HEI, making up around a sixth of all non-UK first degree entrants.

However, there are issues of providence and reliance to consider. The majority of transnational entrants come from a limited number of countries, and indeed there is considerable reliance on a single point of entry. In 2018/19, Mainland China accounted for 8,665 students entering UK first degree programmes on year 2 of the course, with no prior UK study. These 8,665 students make up more than half the total number of transnational entrants - significantly higher than China’s 17 per cent share of direct entrants to UK first degree programmes. Transnational entrants accounted for 38 per cent of all Chinese students on UK degree programmes in 2018/19. Malaysia provided 1,605 transnational entrants. This number represents 40 per cent of all Malaysian students joining UK first degree programmes. Hong Kong is the 3rd largest source of transnational entrants, while Vietnam-domiciled transnational entrants constitute 28 per cent of new entrants to first degree programmes from that country. Meanwhile only 10 per cent of transnational entrants came from EU countries – much lower than the EU’s 34 per cent share of all international entrants to UK first degree courses.

The number of transnational entrants to UK universities, in the UK, fell over the five-year period analysed as part of that research (2013/14 to 2018/19), but this has been balanced by a growth in direct entrants. There

are several possible reasons for this drop in transnational entrant numbers.

- Malaysia has seen the largest drop – possibly due to the attractiveness of local private HEIs. 40 per cent of Malaysian first-degree entrants to the UK started their studies abroad.
- China’s Ministry of Education increasingly encourages TNE partnerships to focus on 4+0 delivered fully in China. This is of significant interest as more than half of transnational entrants to the UK come from Mainland China.
- Bangladesh and Nigeria saw dramatic drops in numbers of transnational entrants coming to the UK. Data is inconclusive as to the reason, but it is likely to be cost and visa related.

In terms of the areas of study, almost half of transnational entrants transferring to year 2, join business and administrative studies compared to less than a third of all international first-degree entrants. Around 79 per cent of international first-degree entrants in year 2 join

5.4 International schools

International schools are important sources of overseas students to UK higher education institutions. According to data from ISC research there were more than 13,000 English-medium international schools globally as of July 2022, representing a 60 per cent increase compared to a decade earlier. Slightly over half of these schools are in the Asia region (broadly defined), with Europe the next-largest host region.

Data from UCAS shows that 31 per cent of non-UK domiciled students applying to UK undergraduate programmes in 2021 applied through schools overseas – a category which

courses in England – slightly lower than England’s 86 per cent share of total international first degree entrants.⁸

More than half of transnational entrants come in year 2 and complete studies in the UK. A significant minority only study for the final year of their studies in the UK.

Transnational entrants generally do not apply through the UCAS system and are therefore typically not captured in UCAS applications data. Engagement with other channels varies – while students transferring as part of a TNE partnership with the host university do not usually need support from an agent, agents do engage with overseas students who wish to transfer to a UK institution after completing the first part of a local degree programme.

It is recommended that there is increased data awareness of actual numbers of transnational entrants and their respective conversion to full UK degrees. More detailed data collection could help to distinguish between students transferring as part of a UK TNE programme and those who started their studies on an overseas institution’s domestic degree course.

largely consists of international schools, as local-curriculum schools are generally not registered as UCAS apply centres.

This data may underestimate the number of students coming to the UK after studying at international schools, as it only includes those who made applications through their schools; not all schools are registered as UCAS apply centres and some students apply directly or through agents. At the same time, while international schools often have counsellors or teachers that help to provide information and support students’ applications to UK and overseas universities,

⁸ British Council and UUKi, Oct 2020, *Transnational Routes to on-shore UK higher education*
www.britishcouncil.org/education/he-science/knowledge-centre/transnational-education/tne-routes-uk-he

some students also engage agents to help provide additional information or help them with the application process, which is not reflected in UCAS's statistics if the application is submitted through their school.

Students that have studied at international schools have similar advantages to those that come to the UK at the school level. Studying in English helps to ensure strong English language skills, while a UK or international curriculum like A-levels or the IB Diploma Programme provides a good foundation for UK university study. This means that students can typically enter directly into Year 1 of a degree course, in contrast to overseas students from local-curriculum schools who often need an additional foundation year at their university or a private pathway provider.

An important sub-set of international schools is represented by COBIS, a membership association that represents more than 400 schools across more than 80 countries. This organisation has a combined total of 165,000 students studying with their members globally, including about 29,000 studying in the UK. According to a survey COBIS conducted in late 2021, the number of students was predicted to grow, with 51 per cent (up from 22 per cent in 2020) of the 115 responding schools reported that pupil numbers had risen this year. A total of 47 per cent of schools also reported an increase over pre-pandemic student numbers at the start of 2019/20.

However, many schools offering an A-level curriculum are not COBIS members and do not describe themselves as "British schools". And while A-levels are the most popular curriculum among international schools globally – offered by 32 per cent of schools according to ISC Research – this is by no means the only curriculum offered, with the IB Diploma Programme and the US

5.5 Students supported by agents

Agents continue to be one of the key influencers and add value to major decisions on study destinations and programmes. Agents represent a broad set of stakeholders for their B2B clients

Advanced Placement (AP) curriculum also popular while the more vocationally oriented IB Career Pathway (IBCP) is now offered by 1 per cent of international schools.

From the perspective of UK HEIs, it is important to bear in mind that not all students at a British school overseas will choose to study in the UK. A representative interviewed for this report commented that the UK faces fierce competition from traditional study destinations such as the US and Australia, as well as newer markets teaching in English, such as the Netherlands and Germany. This means that the UK needs to ensure its promotion is compelling, its promises are delivered, and its processes are smooth. Students are increasingly considering a wider range of HE destinations, and students' perceptions of how welcoming a country is, can be linked to their ease of entry and negative experiences with visas may sway a student to another country, if they are holding multiple offers.

Conversely, UK curriculum schools are not the only international schools sending students to the UK. Schools offering IB programmes or a US, Canadian or Australian curriculum can also send a portion of their students to UK HEIs. In some countries, government-run or private local-curriculum schools also play an active role in preparing students to study abroad and supporting their applications, placing them in a similar position to the international-curriculum schools described in this section.

Ed-Tech services have been developed to support counsellors in international schools, but further support is needed to help counsellors and their students understand the benefits and value of studying in the UK.

with HEIs being their primary client, as well as English language providers, pre-degree pathway providers and schools. In the UK, it is estimated that 45-55 per cent of all UG and PG international

students have had support from an agent in the process of choosing a degree programme and university (ICEF Monitor 2021). This compares with 73 per cent of HEI enrolments via agents in Australia in 2018.

Data from UCAS does not reflect these estimates, with only 13 per cent of non-EU domiciled applicants and 11 per cent of EU applicants submitting their applications through agents. This is because there remain a considerable number of students who are advised by agents but submit their applications independently or via their school.

The prevalence of agents creates both benefits and risks for students and UK education institutions. From the institutions' perspective, agents can reach more markets which can reduce universities' reliance on one or two top markets and help increase diversity of recruitment. They also increase the number of students at the top of the student recruitment journey and can potentially help to increase an institution's visibility. On the other hand, agents represent a variety of different institutions, often including those in countries other than the UK. There is also the risk that an institution's brand is not correctly represented or is diluted. A final disadvantage of agents from the UK institution's perspective is that commission payments increase the cost of acquisition of each student.

From the student perspective, information from agents can often help to open new choices, allowing them to make comparisons on study destinations and institutions more easily. However, there is also potential to be overwhelmed and confused by the amount of information, the possibility they will be given incorrect information, despite Competition and Markets Authority (CMA) regulations, and the chance that decision making is not necessarily helped but hindered through mixed messages.

Agents have invested in technology in recent years to help support their counsellors, to better serve their clients (both students and universities), to remain competitive and to provide valuable data to make informed recruitment decisions.

One of the agents interviewed for this study had introduced an application process that provides a short list of institutions for student to choose from and a guaranteed response within five days. Some of the Russell Group universities have agreed to use this system, which has reduced their application turnaround time from weeks to days. This process is for postgraduate applicants only but all the institutions who joined the pilot said they wanted to start using it for undergraduate applications too which would further result in universities taking applications directly and not through the UCAS system initially.

Although agents have invested in technology, interviewees commented that they still believe students are happier using an omni-channel approach including online and in-person communication. One agent stated that around 75 per cent of the students they work with want that in-person, high value interaction. This means agents are still investing in offices and are expanding their presence globally.

Agents also often recruit through sub-agents – although one interviewed agent stated they took a strategic decision not to use sub agents any longer, in favour of directly interfacing with the students, which they believe will improve the quality and value of their brand.

One interviewed agent welcomed the introduction of a code of conduct similar to that in Australia. They acknowledged it might be challenging for smaller agents to meet the requirements but feel there are a number of agents who are not conducting business in a fair and honest way, which could impact negatively on the Study UK brand. Another comparison with Australia is their scrutiny of agent contracts which includes the cost of commission. Commission rates charged by agent increased during the pandemic as institutions were unable to travel and budgets for marketing and travel were reallocated to higher commissions and/or bonuses. It is unknown at this stage if this was a temporary shift.

Interviewees commented that recruitment from the US works on a revenue share model because the commission is treated as a direct cost of

recruiting international students. This model is a result of regulation. Instead of paying commission to an agent for recruiting US

Agent aggregators

Agent aggregators are third-party organisations that centralise management of recruitment agents digitally for UK HEIs through the use of sub-agents. Aggregators are now firmly a part of the ecosystem and wield recognisable authority and influence in the student decision making process. The category of agent aggregators also overlaps to some extent with Ed-Tech providers, who provide technology solutions to support different stages of the student recruitment journey such as programme listings, lead generation, conversion, and peer to peer communications.

Agent Aggregators were a concern to the agents interviewed as part of this research. One of the main issues raised was the need to appropriately filter and qualify applicants, and the negative impact this potentially has on the Study UK brand, a university's brand, and their visa licence. Several of the larger agents said that while they were not working with aggregators directly, they could be working with them indirectly through their sub-agent network. They are confident though, that through their own processes, the risks they are concerned about are minimal.

From the university perspective, the involvement of agent aggregators further removes universities from controlling their brand internationally as elements of the process have been delegated to external agencies. There is concern around the brand representation of universities, knowing who the agent counsellor is and what they are saying about the UK and the universities. The universities can select which agents they work with but if those agents are using sub agents or they work with aggregators, then that level of due diligence and brand management is dissipated. There is also the potential risk of aggregators creating an oligopoly which could lead to pushing

students, the marketing budget (revenue share) provided to the agent would reflect how many students had been recruited the year before.

for higher commission rates; which some interviewees pointed out had happened in the English as a Foreign Language (EFL) sector.

The importance of agent aggregators is well known in the international higher education sector and yet there is a lack of in-depth understanding as to the role, responsibilities, or indeed oversight of this integral element of student recruitment. Commentary on the report suggested agent aggregators can be grouped into three main categories:

1. Exchange, described as being similar to sites like booking.com;
2. One-Stop, where the aggregator provides additional services such as English language testing, visa applications and advice; and
3. Pathway, where aggregators have a network of agents feeding their pathway programmes into universities.⁹

There is also a fourth category that falls outside of the structured approach of the three above and is often represented by an online presence, advertising high levels of student traffic, an extensive agency network and numerous university partners but the extent to which these claims are verified is negligible. This fourth category is perhaps the greatest argument for increased regulation and oversight.

Aggregators need to be able to demonstrate that they are a true representation of the institutions they are working with, however this relationship could breach some of the regulatory requirements that universities are subject to under OfS and CMA. Aggregators are therefore both an opportunity and a risk. Interviewees commented that the key is to ensure quality

⁹ Preece & Nicol, 2021, *All recruitment agent aggregators are not created equal*
<https://universityworldnews.com/post.php?story=20210412083918495>

control and awareness of the aggregators - based on reputation and suitability for the university at hand - and avoid mass markets without quality control. In the absence of formal oversight of this industry, the due diligence will rest with each individual institution.

Drawing upon the BUILA-UKCISA 2021 framework regarding agent aggregators, there is

5.6 Individual applicants

Many overseas applicants to UK undergraduate courses apply to courses directly through the UCAS website, rather than going through the other channels discussed in this report. Data from UCAS shows that individual applicants made up 46 per cent of the total from both EU and non-EU

scope to explore the key challenges and opportunities moving forward.¹⁰

More research is needed on behalf of institutions to truly understand the risks and the benefits of agent aggregators, one of which might be to help institutions with the sheer volumes of enquiries and applications that has created a strain on institutions' admissions operations in 2022.

5.7 Other channels influencing students

Sponsors

Sponsors have long been an important student recruitment channel and are often a government body or charitable organisation. Government sponsorship is often aligned to a country's skills gap and is looking to serve the citizens by providing the best education in a particular subject.

While some sponsors only provide funding and require students to apply for places at HEIs independently (which may involve one of the other channels listed above, such as an agent), others work directly with UK HEIs to send their students abroad. The contract between the sponsor and the university often includes a reduction in fees or additional academic support such as English language provision.

The number of sponsorships available has reduced in recent years and the negative

overseas countries in 2021 – although it should be noted that this number overestimates their share of all undergraduate entrants as many agent-supported students submit individual applications rather than their application being linked to the agency.

economic impacts of the Covid-19 pandemic has seen that reduced further. The relationship between the sponsor and the institution is typically quite involved, with sponsors often requiring academic update reports. Interviewees commented that, while the application process in previous years would have involved an agent, this is now less common, and sponsors now have a more direct relationship with the institution. It is therefore recommended that HEIs devote time and resources to developing these relationships with sponsors.

Data from HESA shows that around 5 per cent of new overseas undergraduates on UK first degree programmes in 2020/21 received sponsorship from an overseas government, company or other institution.¹¹ However this proportion varies greatly from country to country – for example,

¹⁰ British Universities' International Liaison Association (BUILA), 2021, *A Partnership for Quality: A route to a UK Quality Framework with Education Agents* https://f.hubspotusercontent30.net/hubfs/7566235/BUILA_UKCISA_Research_Report_FINAL.pdf

¹¹ This proportion excludes visiting / exchange students from both sides of the equation

more than three quarters of new undergraduates from Kuwait are scholarship-funded, while in China the proportion is below 1 per cent.

Summer schools and short-term courses

While short-term programmes do not usually act as a direct channel into UK undergraduate programmes, many UK HEIs provide summer schools for overseas students as part of their English Language School's offerings. Many of their students are in Years 11 and 12, and courses often last from 2 to 4 weeks and offer academic content focused on the students' intended areas of study as well as cultural orientation, English language classes and social events. Private providers also offer summer schools, either independently or via UK HEIs.

When a student has had a positive experience of their chosen institution and in their chosen country, summer schools can provide a recruitment route/channel to undergraduate studies. These students may return to their home countries and apply to study an undergraduate degree at a UK institution. Interviewees commented that affluent families prefer to send

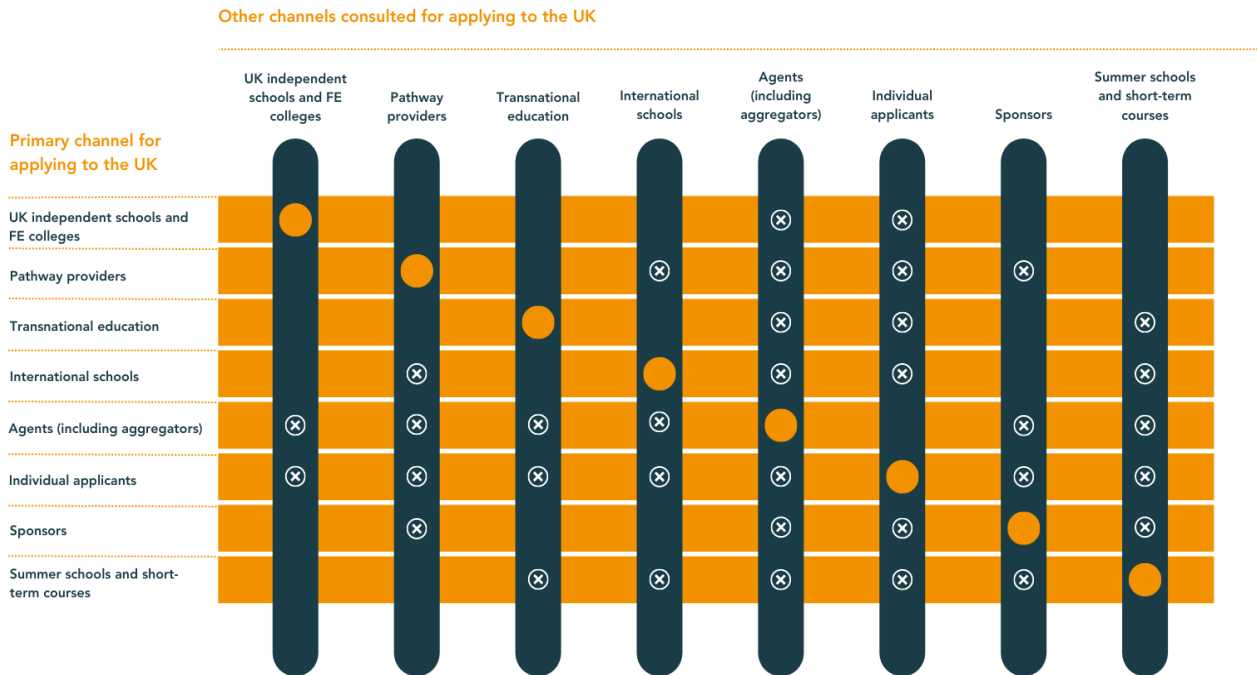
their children to summer schools first to ensure a 'soft landing' and ensure their children have familiarity with a new system and country; or consider summer schools as a 'taster' to introduce students to an institution and country prior to making their undergraduate applications.

While anecdotal evidence from agents suggests that students can be influenced by short-term language programmes, there is currently no data showing conversion rates of summer school students, nor of the size of this channel. However, data from English UK on the number of students studying short-term English language programmes in the UK show that the size of this market dropped dramatically during the Covid-19 pandemic. Future research to capture more inclusive and comprehensive data would be required to draw any firm conclusions on the impact of progression from summer schools to undergraduate programmes.

5.8 Overlapping of recruitment channels

As noted in previous sections, students enter UK HE via a variety of different recruitment channels. Not all students can be categorised into a single channel and the potential for overlap has increased in recent years as more service providers enter the ecosystem. Typical examples of these recruitment channel overlaps during the student journey to undergraduate study in the UK are presented in Figure 6.

Figure 6: Typical examples of overlap between recruitment channels



The above figure shows, for example, how students progressing to UK HE study via a UK independent school may have been subsequently advised by an agent before ultimately applying directly to a UK university via the UCAS website. Or that an international student progressing to UK HE study via a private pathway provider may have previously studied at an international school in their home country. Apparent from the above figure is that applying directly via the UCAS website is always an option for students; and that agents can be involved in all recruitment channels.

6. Implications and next steps

This report provides a summary of the different channels through which international students enter UK undergraduate education and provides a summary of the scale of recruitment based on the apply centres through which students submit their applications through the UCAS system.

Over time there has been a gradual increase in the proportion of undergraduate applicants applying through overseas schools, highlighting the importance of higher education institutions engaging with international schools abroad. UK-curriculum schools are not a 'captive market' for UK universities – students from these schools can and do apply to universities in other countries, while international schools teaching a non-UK curriculum are nevertheless important sources of overseas students.

The report also shows a sharp shift in application channels for EU students in the 2021 entry cycle, likely a result of post-Brexit changes to student finances. There was an especially strong drop in the number of students whose applications were submitted through agents, while there was a relative (but not absolute) increase in the proportion applying via both overseas and UK-based schools. More research is needed to understand the role of agents in EU countries and how this could influence future student recruitment trends.

While some conclusions can be drawn from this data, it does not give a full picture of trends for two main reasons. Half of all applicants submitted individual applications directly through UCAS's online system, but many of these students were likely advised by agents while some overseas schools may not have been registered as UCAS apply centres. At the same time the data does not account for students who did not apply through

the UCAS system, such as those entering through TNE partnerships and through direct links between universities and private foundation providers. Improved data on entry channels and previous study would help to build a better understanding of the changing ways in which overseas students enter UK higher education.

Another important finding from this research is that there has been an increase in the number of organisations involved in bringing a student to the UK. While this means that UK HEIs are able to reach more markets and increase both overall recruitment scale and student diversity, it also means that there is more risk that an institution's brand is not correctly represented or that students will be given inaccurate information. From the institution's perspective, the proliferation of agents and recruitment channels can also potentially create confusion and management difficulties, as well as increasing the amount of money universities need to spend on commissions. Interviewees noted that, with more organisations involved in the student journey, there was sometimes a need for HEIs to pay commission to multiple organisations for a single student, or confusion in the form of multiple organisations claiming credit for a single student. Further investigation into the role of agent aggregators is required to truly understand the challenges and the opportunities this new channel in the ecosystem brings, and the extent to which oversight by bodies such as the Office for Students and similar bodies in other countries might be helpful in reducing relevant risks for institutions and UK education as a whole.

Appendix 1: Available data on student recruitment channels and data gaps

There are significant data gaps that cause difficulties for an understanding of the complete student journey and the full eco-system, identifying where there might be issues in conversion and how dependent one channel might be on another.

The main data source used for this report was a custom data request from UCAS, providing an overview of the number of international undergraduate students applying to study at a UK institution and accepting places. This data set divided students by Apply Centre code, which were further analysed to divide students into those applying through UK schools, overseas schools, agents and other groups described in previous sections of this report. UCAS also holds additional data such as detailed country of domicile or the institutions to which students apply.

However, this data does not give a complete picture for several reasons:

1. Not all students and their related pathways are captured, because some groups of students – such as those enrolled on transnational education partnerships or many students at private foundation providers – transfer to UK universities directly without going through the UCAS system.
2. Large numbers of international students apply directly through UCAS's online system even if they have engaged with other channels (especially, but not only, agents), meaning they are not clearly associated with a channel.

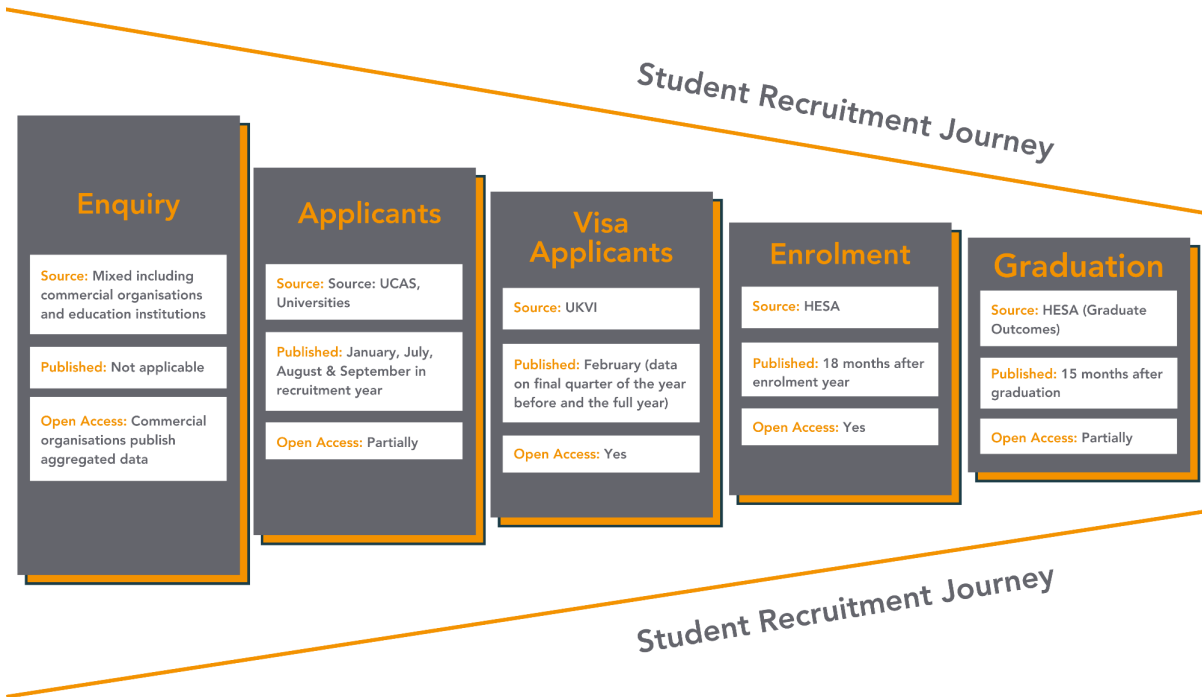
3. Even applicants applying through a UCAS Apply Centre may use more than one service provider so overlaps between groups – for example a student at an international school who was also supported by an agent – are not captured.

In addition, it is difficult to align data from UCAS with the other main source of statistics on international students in the UK, HESA. Application years are not comparable due to deferrals, and not all undergraduate students appearing in HESA statistics will have gone through the UCAS system. In addition, there are large delays between different data releases, and UCAS applicant data is 12-18 months ahead of what is published in HESA enrolment data.

HESA data alone does not provide the right detail to understand the recruitment pathway through which a student entered UK higher education. In one key area, students entering part-way through the UK course, UCAS data is not available and statistics from HESA do not provide sufficient detail to distinguish between students transferring to the UK as part of a UK TNE course, those entering the UK from a local programme at an overseas university through credit-recognition / articulation agreements, and students entering at a more advanced stage via sub-degree qualifications.

Another key dataset in the sector is statistics on visa applications and issuances, published by the Home Office. However, this data does not clearly distinguish between different levels of study and statistics on extensions do not show whether a student is extending a current course or transferring to a new course in the UK.

Figure 6: Data sets available at different stages of the student journey



Other data sets in the sector, related to international undergraduate student recruitment to the UK, are standalone / isolated and either not publicly available or provide limited information. There is no central repository for all these data sets which means not all recruitment channels are captured accurately, wholly or at all, and this adds to an incomplete overall picture of the recruitment channels students choose when studying in the UK. Private pathway providers have their data collected by a third party which shows the number of students coming through that recruitment channel, but these statistics do not match the data from HESA. Additionally, there are gaps in the FE sector data as FE institutions are not required to submit data to HESA nor to report on international student nationalities.

There are also data misalignments between the ONS and the Department of Education's assessments and it is crucial to consider the role of pathway providers when calculating the value of UK HE exports in order to reflect the true value more accurately. Whilst the AoC and the Home Office collect data, there is still a lack of granular detail which needs to be addressed if the UK International Education Strategy is to be data driven and inclusive.

To better understand the scale of different pathways into UK HE, it would be necessary to make improvements to the available data to ensure the ability to analyse data at a granular level. This would require increased consistency of coding and definitions, and greater clarity on data submissions and classification of students.