



INTERNATIONAL EDUCATION SERVICES

Ellie Buchdahl and Almut Caspary
EU Region

EU Brexit temperature check: Research results

Agenda

Discuss findings of two research pieces:

- Study UK considerer survey (02/20)**
- A/B message testing on EU students (03/20)**

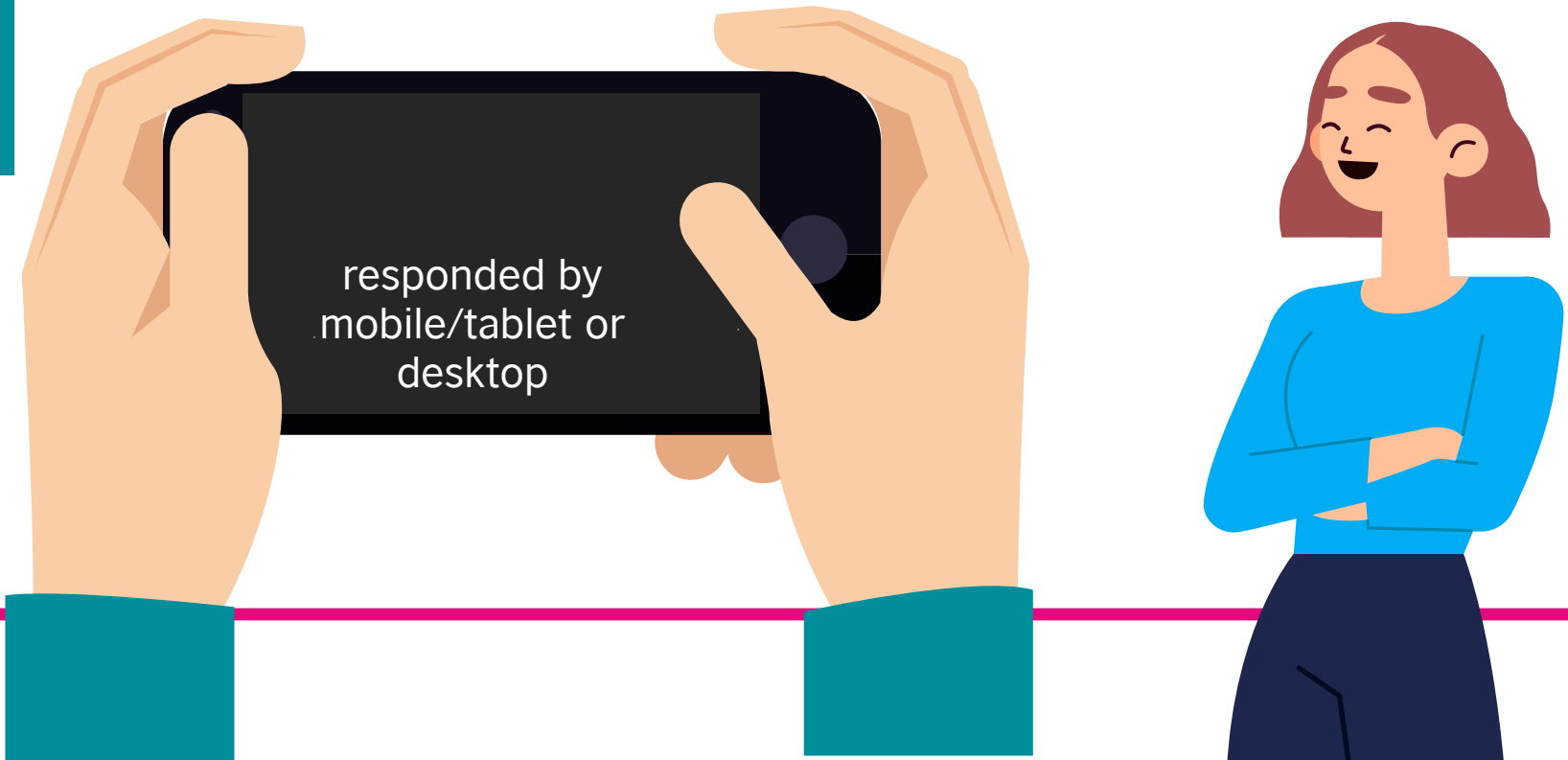
- 1. General considerations when planning study abroad**
- 2. Brexit effect on student decisions**
- 3. Understanding post-Brexit barriers in depth**
- 4. Information seeking**
- 5. Message testing**

Approach and sample

1,125 prospective students in France, Germany, Spain, Greece and Poland

Fieldwork completed before the end of

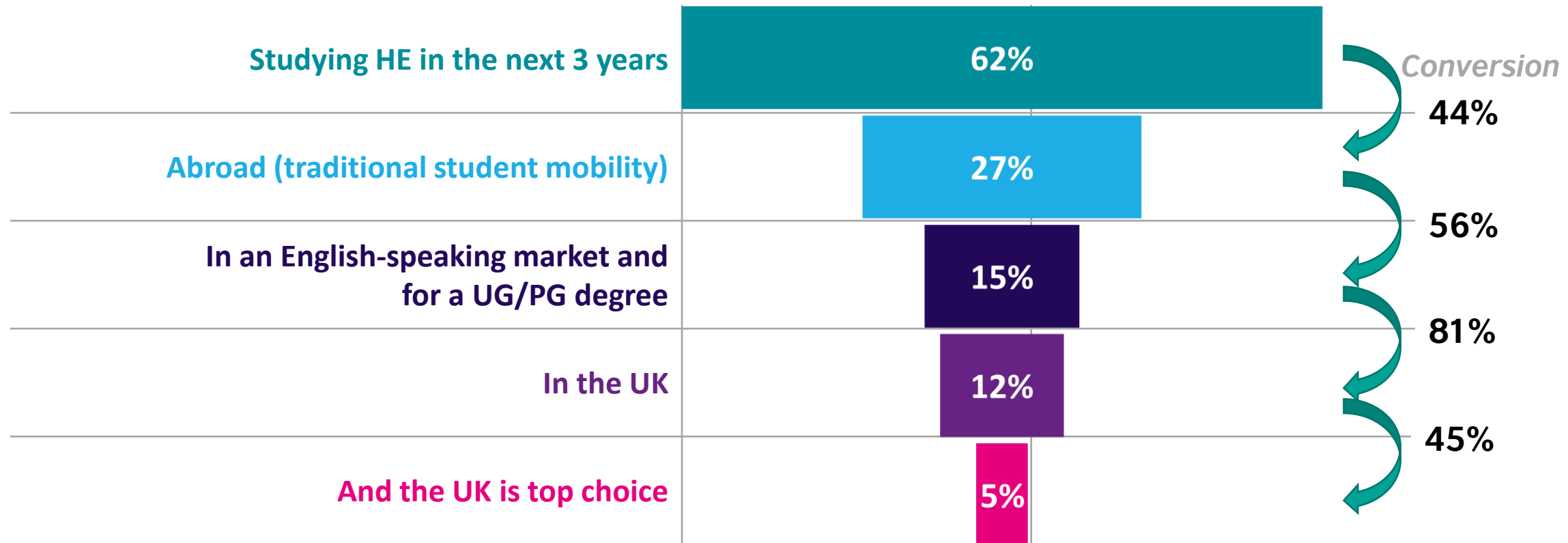
- All 16-34 years old
- Eight-minute survey
- Must be considering UG or PG traditional student mobility in an English-speaking country in the next three years
- Quotas on age, level considering studying.



The biggest challenge is ensuring that those who consider the UK amongst others put it as their top choice

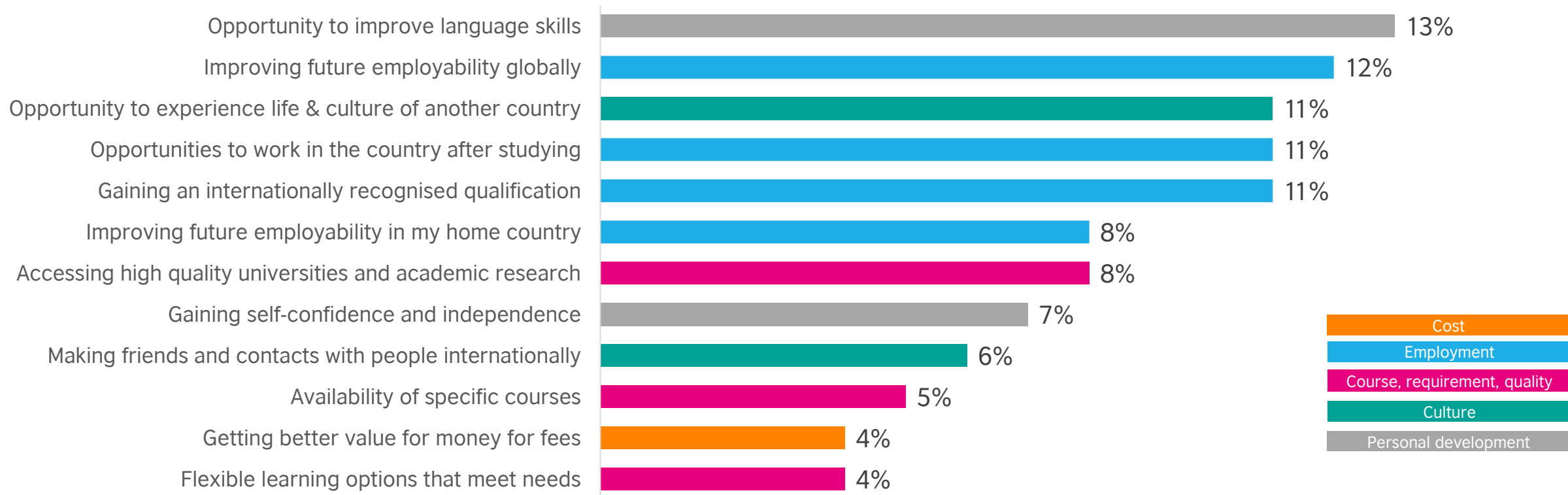
Conversion funnel | screenout data

% who are considering...



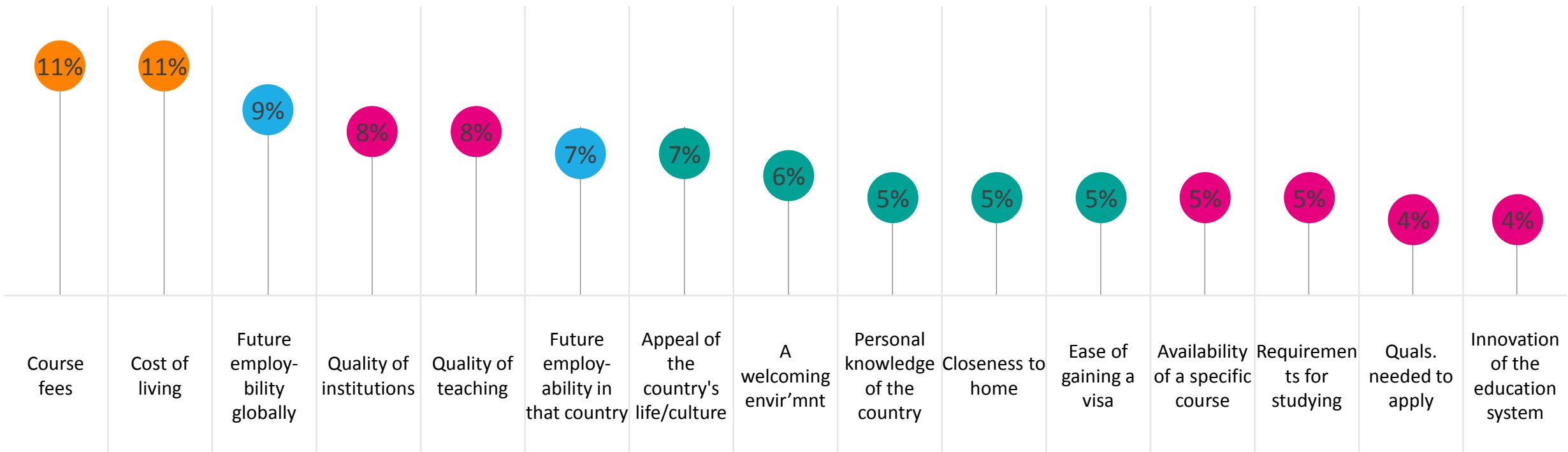
Students believe that international study will improve their skills and employability, and offer a chance to experience a new culture

% ranking each item as the top perceived benefit for studying abroad (traditional student mobility)



Students have a lot to consider when planning their study abroad, but cost is the dominant concern

% ranking each item as the most important consideration when studying abroad



The UK is well recognised for quality, culture, careers & job prospects

% T2B net (all rating positively) | Total

Course, requirement and quality of education		Culture		Cost		Employment	
UK	96%	Germany	96%	Germany	74%	UK	82%
USA	93%	UK	93%	UK	59%	USA	80%
Germany	88%	USA	93%	Canada	55%	Germany	75%
Canada	88%	Canada	88%	Netherlands	52%	Canada	74%
Netherlands	66%	Netherlands	72%	USA	50%	Netherlands	55%

The UK and the USA's strong consideration is led by their strength in institution quality

Country performance | total



% T2B net (all rating positively)

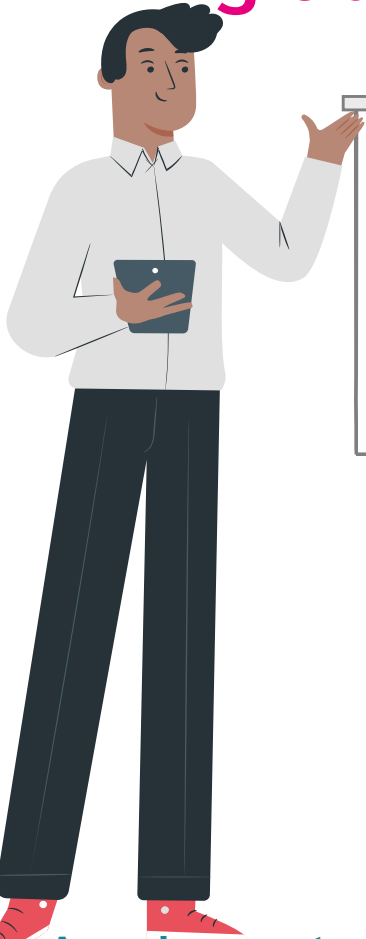
Course, requirement and quality of teaching

UK	96%
USA	93%
Germany	88%
Canada	88%
Netherlands	66%

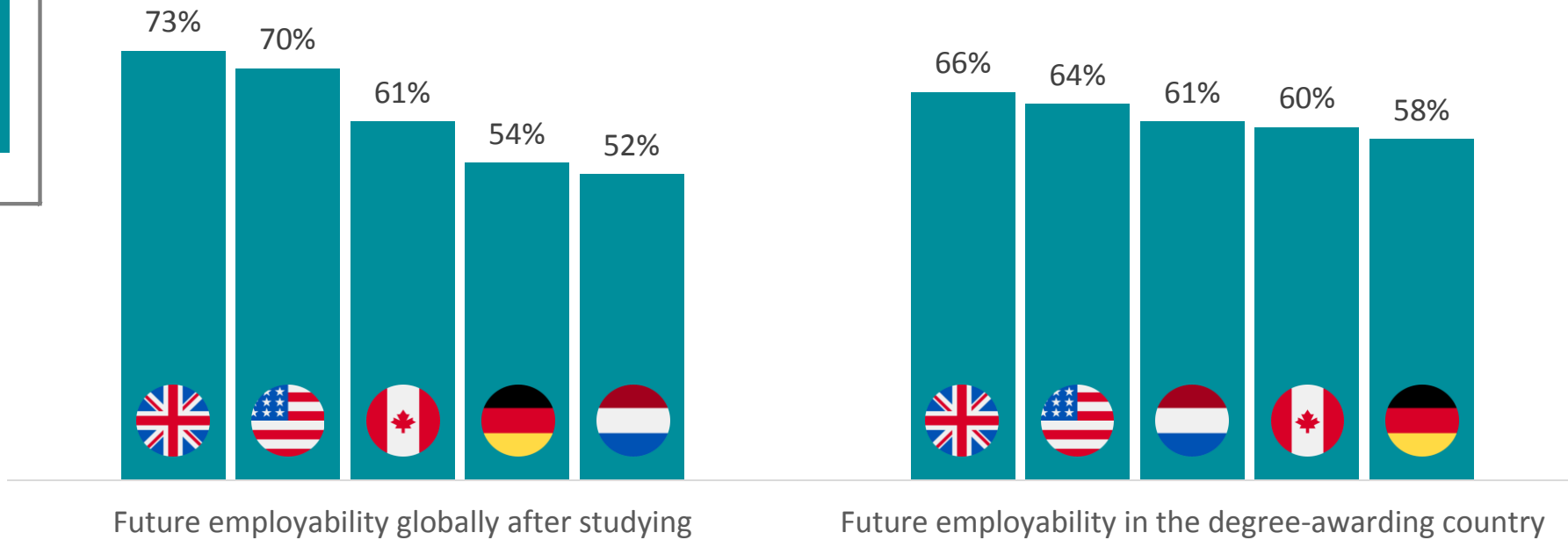
	UK	USA	Canada	Netherlands	Germany
Quality of universities and academic research	75%	73%	61%	50%	51%
Quality of teaching	74%	67%	62%	56%	58%
Academic / language requirements for studying	74%	68%	59%	55%	42%
Availability of a specific course	69%	66%	56%	47%	48%
How innovative and creative the education system is	65%	64%	62%	62%	49%
Grades/qualifications needed to apply	63%	52%	48%	53%	47%

Prospective students already acknowledge the UK's high-quality education, so messages that aim to encourage students to study should focus on other, less strongly held perceptions

And studying in both the UK and USA is felt to offer stronger global employment opportunities, more so than other markets



Global employment opportunities:
2nd most important
consideration when
studying abroad



A real opportunity for the UK to promote these global career opportunities but need to differentiate this against USA

What's the effect of Brexit?

Brexit is already having a negative impact on intent to study in the UK

'I don't know how the situation will unfold. Things are way uncertain right now and the UK seems like it's drawing back. That's why I would consider something more secure even though I always wanted to go there.'
Greece, Female



For 4/10, Brexit has weakened UK consideration, but over half won't be put off

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

42%

Brexit makes me less likely to consider the UK

56% are either indifferent or more positive: likely to maintain over half the students considering the UK for higher education. Just 2% are unsure

29%

Brexit makes no difference when considering the UK

27%

Brexit makes me more likely to consider the UK

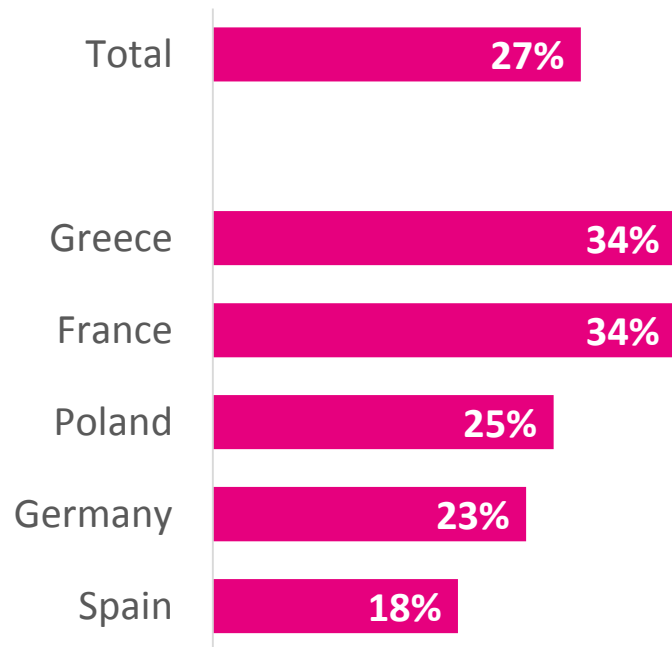
However this rejection isn't universal and reflects differences in domestic situations

Among those who don't consider the UK as a destination for study, Brexit is the main reason for rejection



It's not a barrier for everyone - for some, Brexit is a chance for the UK to grow outside the constraints of the EU

Brexit makes me **more** likely to consider the UK



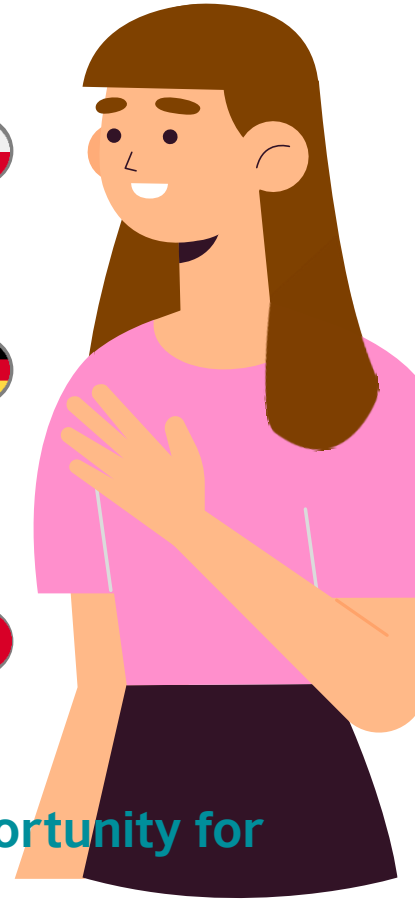
*'Great Britain is becoming a more attractive and **independent** country for me, with an individual approach of its own, like Switzerland.'*



*'I see Brexit as a very **great opportunity** for the UK to **advance economically**. If you work there after your studies, you can greatly improve your standard of living.'*



*'Because the UK is **no longer subject to the EU education directives**, which makes it possible to **raise the quality of the courses and allow innovative education ideas** to be expressed much more.'*



Potential to leverage the UK's strengths in perceived future employability as an opportunity for prospective students

Although amongst a minority, there is some strong anti-EU sentiment – it's an emotional and polarising topic



*'Because the EU is bulls**t and the English will become a very rich world superpower.'*

- Greece

'They will not submit to European standards, e.g. migration, it will be safer.'

- Poland

'Because the EU is trash.'

- Greece

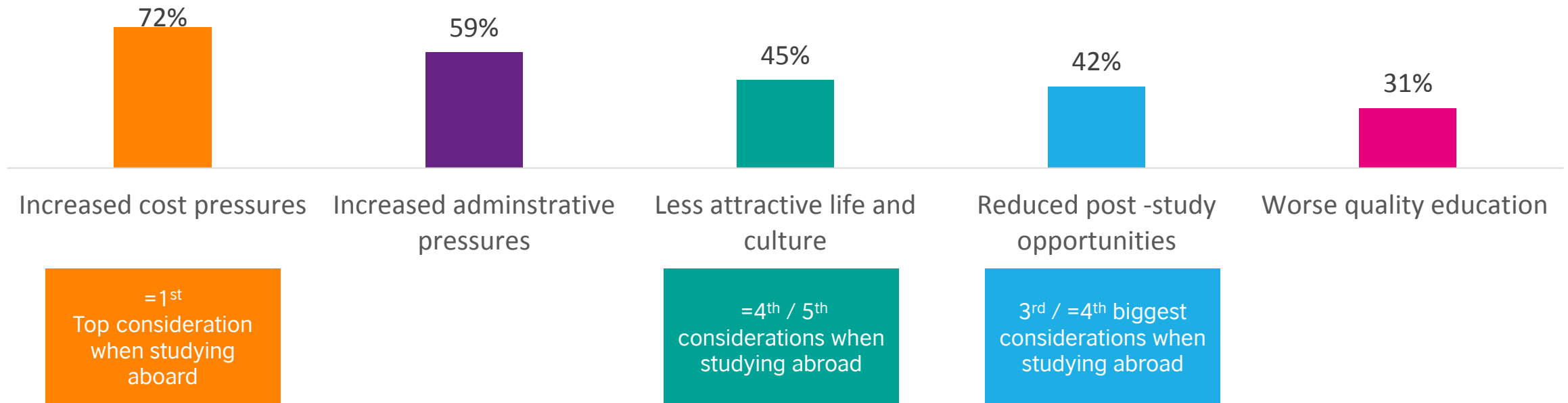


The EU project has not benefitted all countries equally: Greece has the least favourable opinion of the EU, its handling of economic situation, and the migrant crisis

Important to remember that attitudes to the European project are linked to personal circumstance and often divisive

Typically however, Brexit leads to worries about the cost of studying in UK, but concerns are multi-faceted...

What are prospective students most concerned about post Brexit?



Brexit troubles prospective students in the key areas that students care most about when studying abroad – can the British Council play a role in guiding future students through these challenges?

Understanding post Brexit barriers in depth...

Brexit represents a big unknown – students are concerned about a lack of clarity around costs and opportunities, but some already feel unwelcome here



Cost concerns are not limited to tuition fees; they extend to healthcare costs and loan access as well

Fees are the main concern...

Post Brexit concerns



But concerns about costs are widespread

- 33% Healthcare costs will increase
- 31% Harder to access student loans
- 25% Upfront payments needed
- 23% Unable to receive UK govt. grants



*'Immense **tuition fees** due to non-EU tariff; the **EU funding** programs can no longer be used.'*



*'There **was a lot of funding** things to study in UK, now after Brexit studying there will be more **expensive.**'*

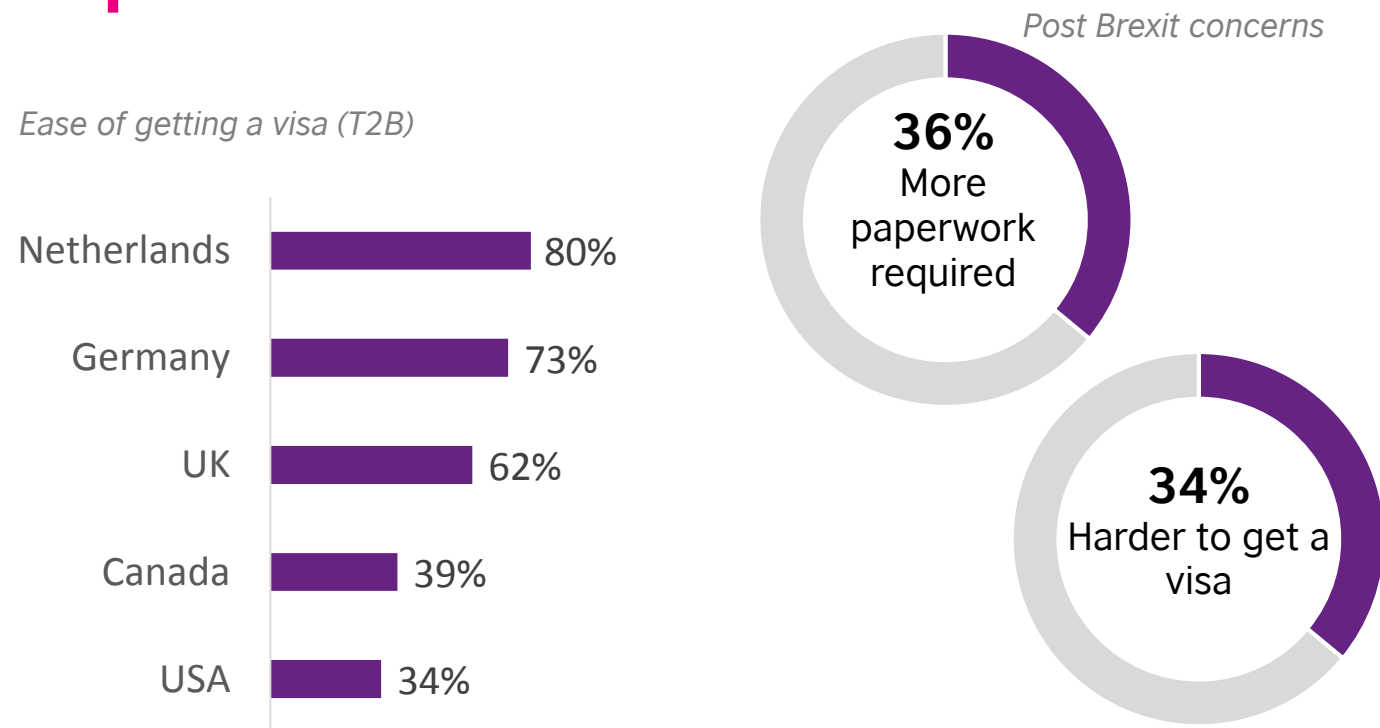


*'I believe that **tuition for universities will be multiplied.** In particular, I believe that the fees will be as much as the non-British and European citizens have paid so far, **an astronomical amount for my own finances and that of my family.**'*



Students need reassurance and information on a wide variety of cost related worries – how can the British Council signpost to funding programmes in the home countries of students?

The UK is not (yet) seen as difficult to get a visa for as North America, but studying in other EU countries is relatively painless



*'All the **disadvantages** of a non-European country: customs taxes, need for a **visa**, more **difficult communication** with your family from a distance.'*



*'Because it will be **harder in every way** to move to the UK. I will surely need a **visa** and in general **more paperwork** to travel there.'*



*'It makes me **insecure not to know how** European citizens traveling or living there, the **necessary requirements or visas** will be treated.'*

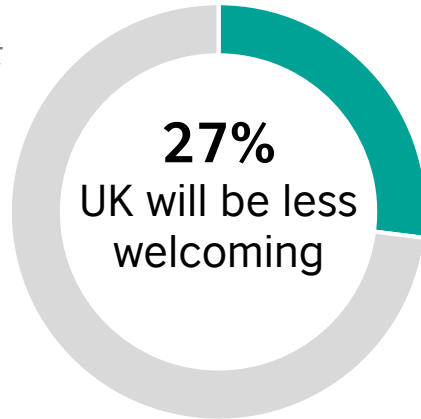


The lack of clarity makes prospective students insecure about how to plan to apply and live here: anything the British Council can do to help students navigate these changing times will be appreciated

Brexit means a withdrawal from the open, global culture that prospective students seek to experience

A perceived unwelcoming environment is evident

Post Brexit concerns



*'I'm afraid that the country will become **racist** and **closed in on itself**.'*



*'Xenophobia exists in British society, this decision to leave shows **inward-lookingness and rejection by British citizens**.'*



*'Poles are **persecuted and displaced there**; I do not intend to live in such a country **where man is a wolf to man**.'*



*'Brexit is **mostly supported by racists** and I already have **enough racism at home**.'*



And drowns out other, secondary concerns

14% People I know will leave

11% Culture will be less appealing

8% Won't be able to find friends from my country

The UK needs to be seen as an open, welcoming destination for prospective students or risk these students choosing another, likely European destination

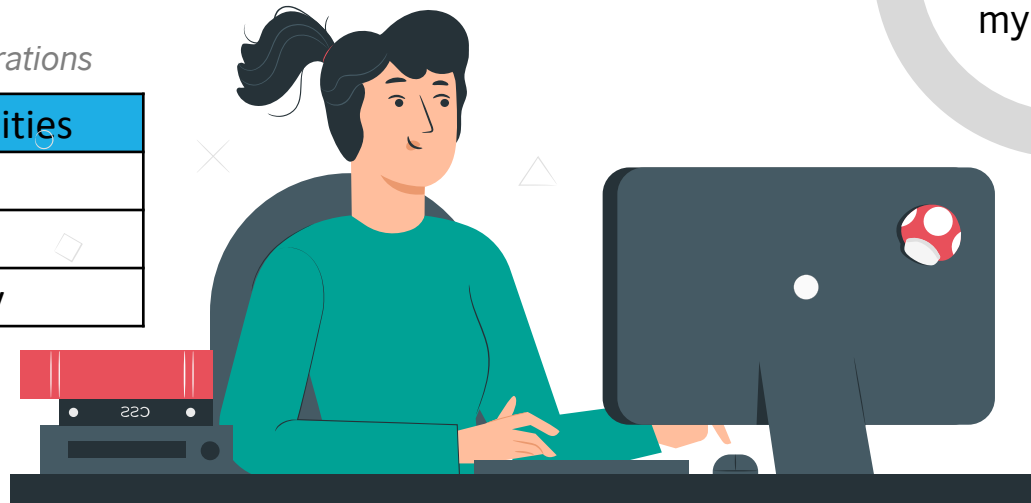
The UK has strength in employment opportunities, but students need clarity on post study rights and opportunities

Benefits of TSM

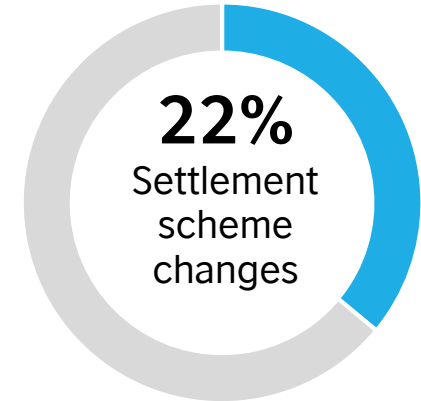
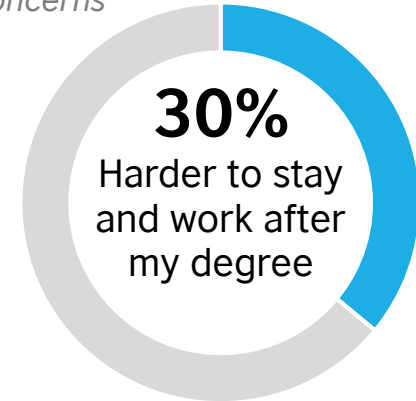
1 st	35%	Improve language skills
2 nd	34%	Future global employability

Country rating: studying considerations

Employment opportunities		
1 st	82%	UK
2 nd	80%	USA
3 rd	75%	Germany



Post Brexit concerns



'Fewer job opportunities in the EU if you study in the UK.'



'The situation makes it more difficult to have options after graduation or while studying.'

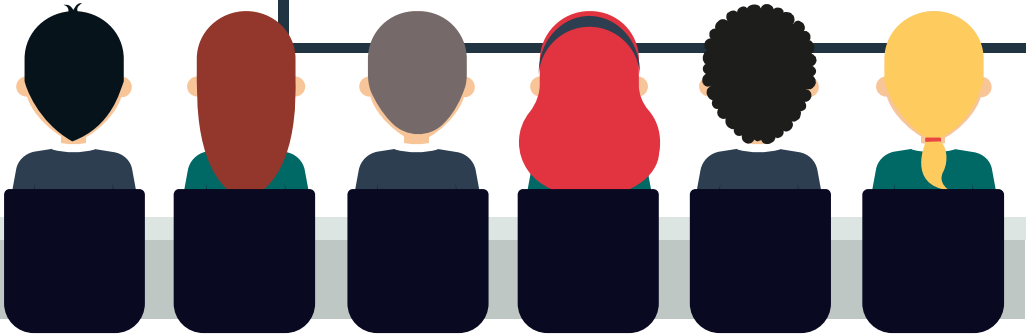
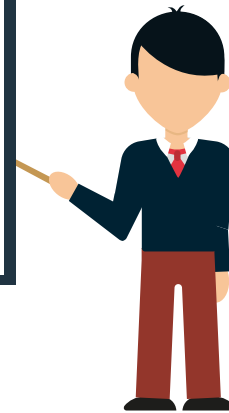


There is anxiety and uncertainty about the ability to stay and work in the UK post study - Brexit is threatening one of the most compelling aspects of international study

Despite Brexit, quality education provision is one of the UK's strongest assets: people believe in the value of a UK degree

Country rating: studying considerations

Quality of teaching (T2B)		
1 st	75%	UK
2 nd	67%	USA
3 rd	62%	Canada



*'This country **needs specialists and respects them as employees.** I think that after 2020 it won't be a problem to stay there and **continue my studies.**'*



*'Brexit would not stop me from wanting to study in the country. The conditions would then probably be **similar to those in the USA and Canada.**'*



'Because I find it to be one of the countries with the best education systems, finding a job on what I specialise in.'



As Brexit increases cost and cultural concerns, it's more important to highlight what the UK does well

Students are fearful of the Brexit consequences: it's made the UK a less attractive destination

- Brexit is already weakening the UK's consideration, and for a minority, is why they reject the UK as a study abroad destination.
- However, Brexit remains a divisive issue and doesn't bother everyone: for some it's a chance for the UK to grow outside of EU constraints – local market communications need to reflect this.
- Prospective students have many concerns around studying in the UK post Brexit: these revolve around cost, increased administrative pressures, less attractive culture, and reduced post study opportunities.
- Many fear costs, including fees, will increase, putting an education in the UK out of reach of many prospective students.
- The lack of clarity around the future opportunities staying in the UK means students struggle to plan their lives, including working after graduation here.
- TSM students are outward looking, and for these, Brexit signifies a withdrawal from the global stage.

Information seeking

Students can be reached through many channels – they are thorough researchers

A recap: what do students need to know?

When studying abroad, students want great employment opportunities, quality teaching, and to experience another culture, but must trade off this against cost

Brexit represents a big unknown – students are concerned about a lack of clarity around costs and opportunities, but some already feel unwelcome here

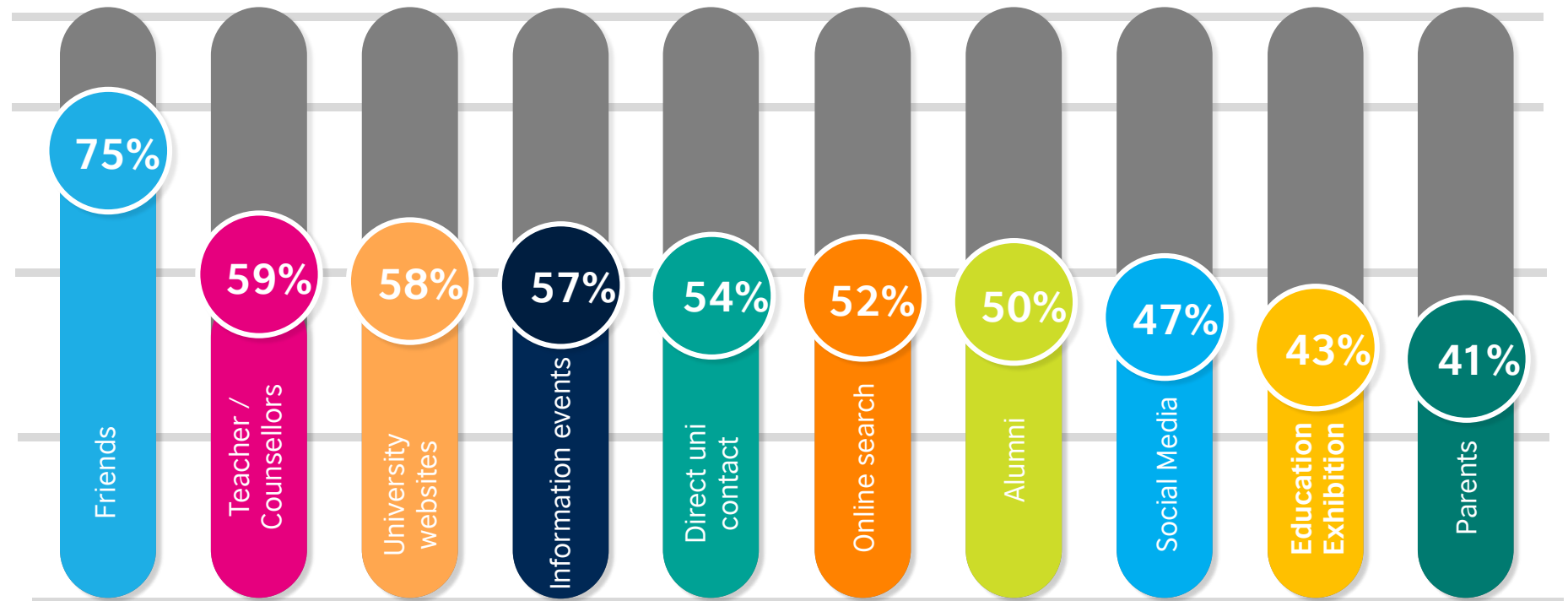
So how do we reach these students to address these fears?



Studying abroad is a highly involved process: prospective students use 12 separate channels to explore their options

% using each channel: Top 10 channels used

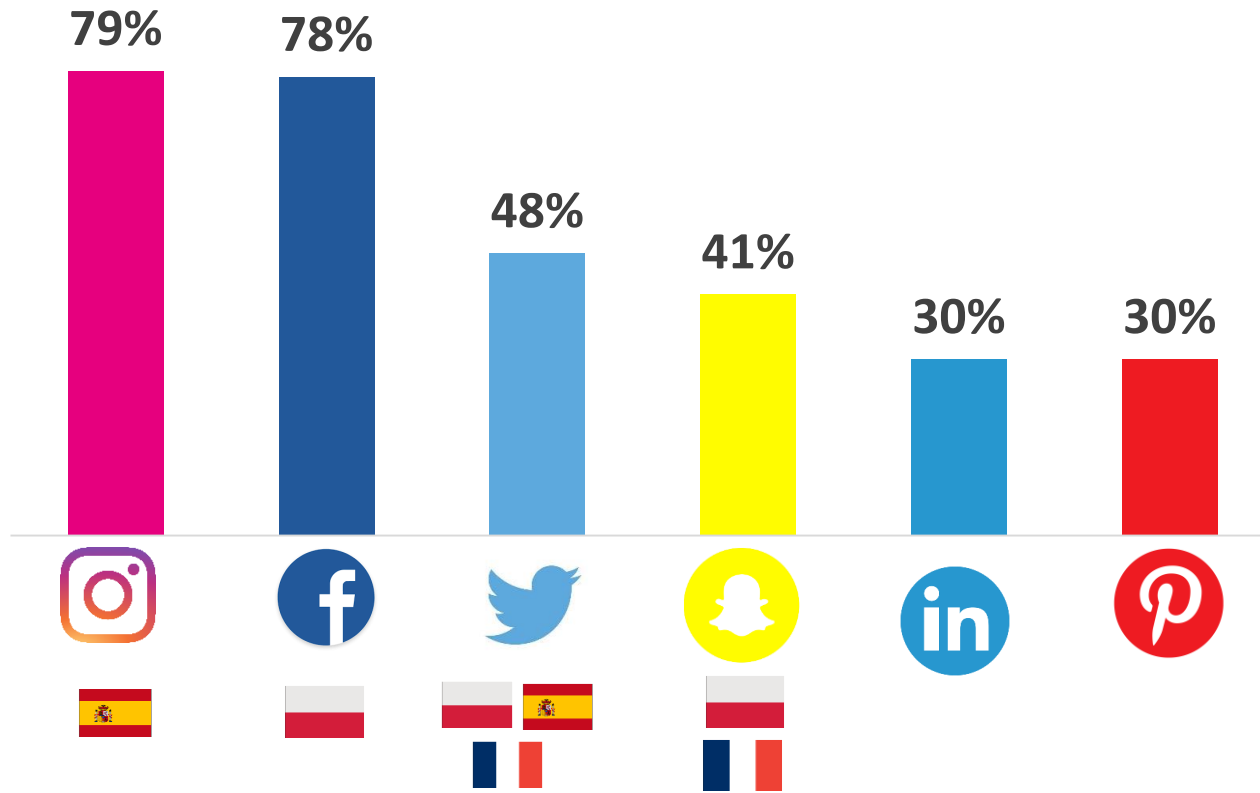
12
Average no. of channels used



Peer to peer influence is huge - it'll be important to ensure the content can easily be shared with friends

While students are active on social media, it's not yet central to researching their options for studying abroad

Social network usage (general)



43% Have used/will use social media to explore their options to study abroad

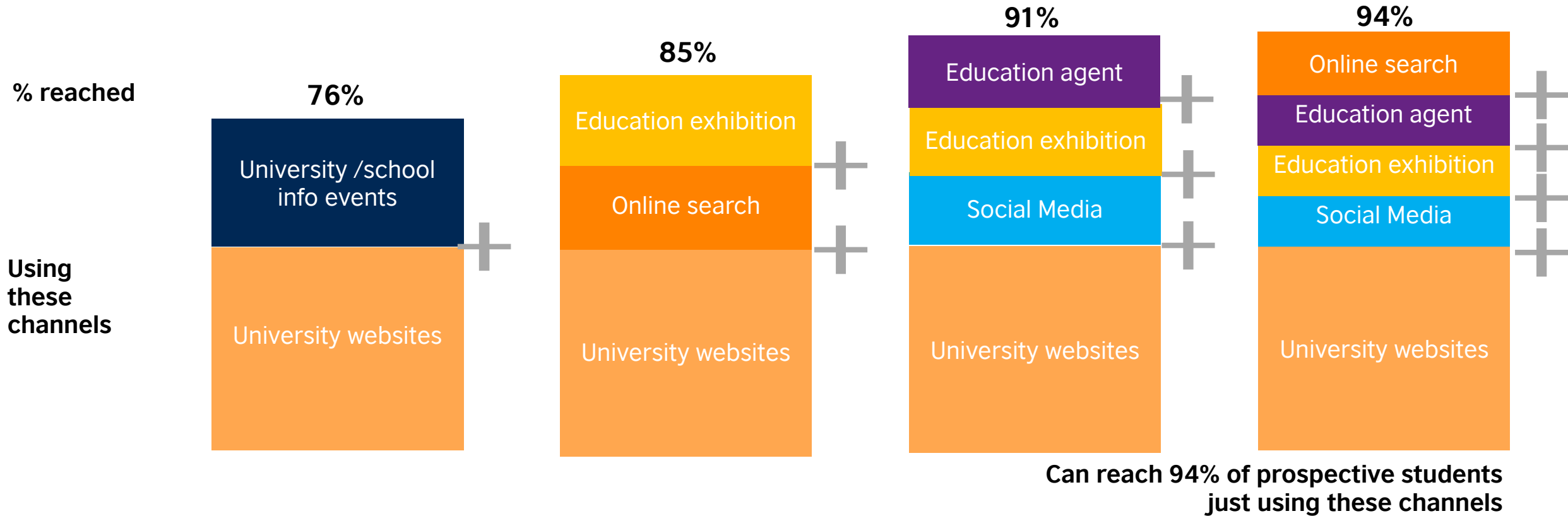
How are they using social media?

- Looking at posts from other students
- Looking at posts from other people living in that country
- Looking at posts from the university account

N.b. Market flag indicates overindex in usage

But even excluding word of mouth, it's still possible to reach almost all students just through five channels

Analytics: TURF methodology without word of mouth sources

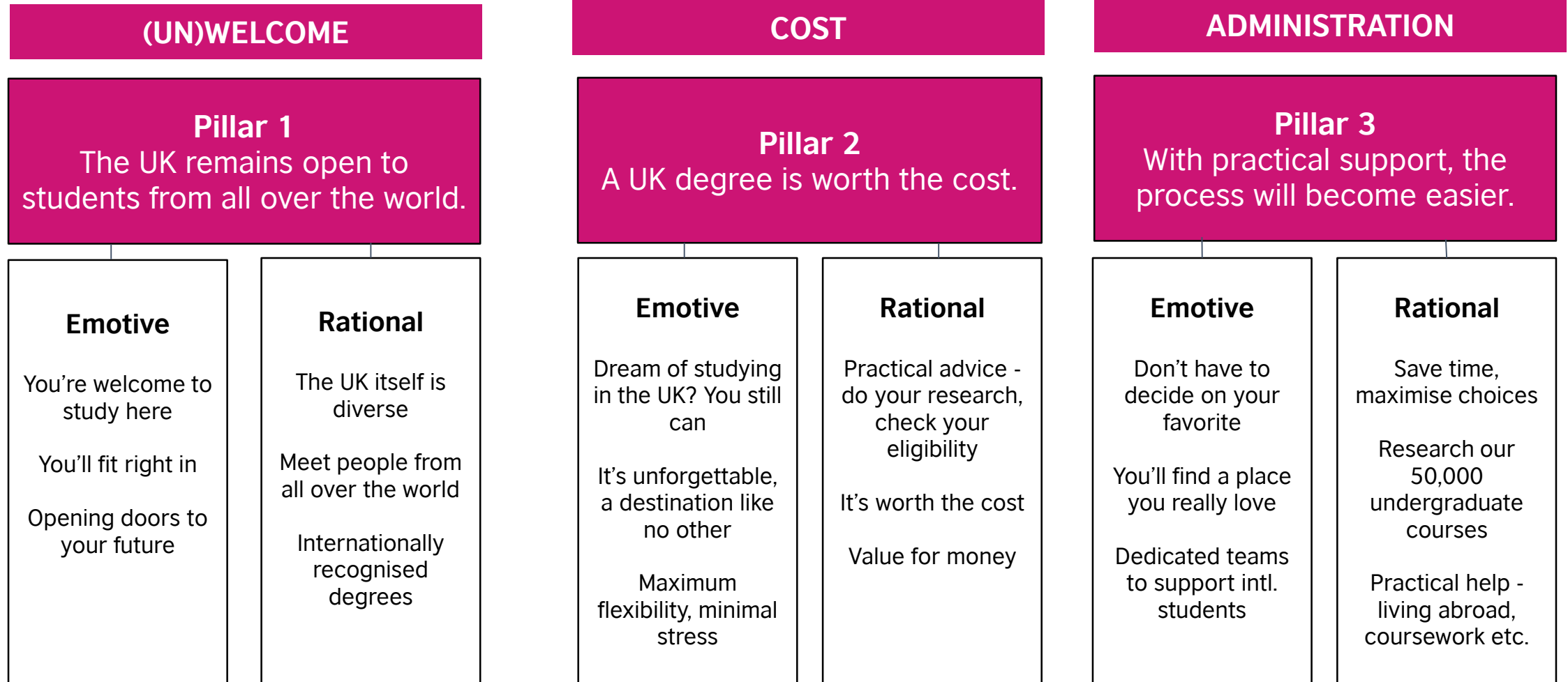


A/B Brexit messaging testing

- France, Germany, Greece, Poland, Spain
- 11-26 March 2020
- **Search:** Google search
- **Social:** Facebook and Instagram
- **Success indicators**
 - CTR: Click-through rate from ad to page
 - CPL: Cost per landing page view
 - CPM: Clicks per thousand views
 - FAU: Find a University tool clicks



Pillars: Brexit concerns



Paid media summary

Benchmarked Results

Impressions:
3,333,600
Clicks: 11,320
CTR: 0.34%

Results Achieved

Impressions:
4,622,322
Clicks: 15,883
CTR: 0.34%

Significantly exceeded KPIs set.

Poland had the **highest overall CTR** of 0.39%,
Germany had the **lowest** at 0.29%.

18-24 was the top-performing age group.

606 'Find a University' Search click conversions were achieved, as well as 256 Institution Page clicks from 'Find a University'.

Pillar results

Country	Overall Winning Pillar	Platform	Winning Pillar
Italy	Pillar 2: Cost of UK degree	Social	Pillar 2: Cost of UK degree
		Search	Pillar 3: Practical support, easy process
Germany	Pillar 2: Cost of UK degree	Social	Pillar 2: Cost of UK degree
		Search	Pillar 1: Open to students worldwide
France	Pillar 2: Cost of UK degree	Social	Pillar 2: Cost of UK degree
		Search	Pillar 3: Practical support, easy process
Spain	Pillar 1: Open to students worldwide	Social	Pillar 1: Open to students worldwide
		Search	Pillar 3: Practical support, easy process
Poland	Pillar 2: Cost of UK degree	Social	Pillar 2: Cost of UK degree
		Search	Pillar 1: Open to students worldwide

Social: Cost --- Search: Mixed practical support / welcoming community

Tone results

Country	Platform	Winning Tone - Pillar 1	Winning Tone - Pillar 2	Winning Tone - Pillar 3	Winning Tone Overall
Italy	Social	Rational	Emotive	Rational	Rational
	Search	Emotive	Rational	Emotive	Emotive
Germany	Social	Emotive	Rational	Emotive	Emotive
	Search	Rational	Emotive	Emotive	Emotive
France	Social	Emotive	Rational	Rational	Rational
	Search	Rational	Rational	Emotive	Rational
Spain	Social	Emotive	Rational	Emotive	Emotive
	Search	Equal	Rational	Emotive	Equal
Poland	Social	Emotive	Rational	Rational	Rational
	Search	Equal	Rational	Rational	Rational
OVERALL		Emotive	Rational	Emotive	Rational

Rational wins overall (though there are variations)


Poland: By pillar performance

Pillar 1

The UK remains open to students from all over the world.

British Council Polska Sponsored · 🌐

Our universities bring students together from across the world to share their ideas and experiences, and you could join them.



It doesn't matter where you're from.

STUDY-UK.BRITISHCOUNCIL...
Want to study in the UK?
You're welcome here. [LEARN MORE](#)

Top-performing ad on Search: Rational

Want to Study in the UK? | Highly Ranked Universities | Find Out More
[Ad](#) study-uk.britishcouncil.org/Study-UK/find-out-more

We're home to some of the world's most prestigious universities. Find your course. Study in the UK. Graduate with a degree recognised internationally.

Top-performing ad on Search: Emotive

Want to Study in the UK? | UK Course Finder | Find a University for You
[Ad](#) study-uk.britishcouncil.org/Study-UK

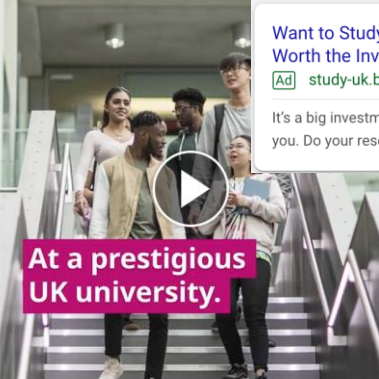
You're welcome here, exactly how you are. Find the course for you.

Pillar 2

A UK degree is worth the cost.

British Council Polska Sponsored · 🌐

Studying abroad is expensive. Studying in the UK is worth it. Get a degree that's recognised internationally.



At a prestigious UK university.

STUDY-UK.BRITISHCOUNCIL...
Want to study in the UK?
It's worth the cost. [LEARN MORE](#)

Top-performing ad on Search: Rational

Want to Study in the UK? | UK Course Finder | It's Worth the Investment
[Ad](#) study-uk.britishcouncil.org/Study-UK


It's a big investment, but it'll be worth it. Find the course for you. Do your research – you could be eligible for financial help.

Pillar 3

With practical support, the process will become easier.

British Council Polska Sponsored · 🌐

Maximise your chances with UCAS. Apply to five universities once, so you'll save time on writing individual applications.



STUDY IN THE UK

BRITISH COUNCIL GREAT
BRITAIN & NORTHERN IRELAND

STUDY-UK.BRITISHCOUNCIL...
Want to study in the UK?
Get help with your application. [LEARN MORE](#)

Top-performing ad on Search: Rational

Want to Study in the UK? | UK Course Finder | Choose From 50,000+ Courses
[Ad](#) study-uk.britishcouncil.org/Study-UK

With practical support, you can do it. Find the course for you. Maximise your chances. Apply to five universities at once.

Find a university insight: Poland

Platform	Tactic	Impressions	Clicks	CTR	FAU clicks	Impressions per click	CPM	No clicks per FAU click	CPC	Cost per FAU click
Facebook	Pillar 1	319,302	1049	0.33%	22	14,514	£2.78	48	£0.85	£40.30
	Pillar 2	492,796	1979	0.40%	20	24,640	£2.17	99	£0.54	£53.58
	Pillar 3	814,640	3118	0.38%	25	32,586	£1.19	125	£0.31	£38.66
Google	Pillar 1: Emotive	1,010	51	5.05%	22	46	£118.56	2	£2.35	£5.44
	Pillar 1: Rational	1,057	59	5.58%	18.5	57	£114.01	3	£2.04	£6.51
	Pillar 2: Emotive	543	12	2.21%	1	543	£41.90	12	£1.90	£22.75
	Pillar 2: Rational	438	18	4.11%	2	219	£58.15	9	£1.42	£12.74
	Pillar 3: Emotive	1,106	37	3.35%	5.5	201	£58.73	7	£1.76	£11.81
	Pillar 3: Rational	1,042	29	2.78%	10	104	£73.13	3	£2.63	£7.62

Pillar 1

The UK remains open to students from all over the world.

Pillar 2

A UK degree is worth the cost.

Pillar 3

With practical support, the process will become easier.

What we learnt

- For **social**, the cost of a UK degree attracts most clicks, delivered in a rational way
- For **search**, practical support attracts most clicks
- Overall, rational messaging was most attractive – but it depended on market / pillar
- However, CTR doesn't necessarily equate to university searches... in Poland, the lowest cost per click to the 'find a university' tool came via emotive messaging. This underlines the importance of specific customer journeys via specific messages / outcomes.

Thank you! ...and stay in touch

EU Europe: Where we are

- 28 countries
- IES countries: Bulgaria, Cyprus, Germany, Greece, Italy, Poland, Romania, Spain
- Subscribe for Europe alerts on IES
- Covid-19 updates (incl. France and Ireland)
- Ellie Buchdahl:
ellie.Buchdahl@britishcouncil.org
Almut Caspary
almut.Caspary@britishcouncil.org
- Our thanks to 2CV and Natives for their research

