
UK as a Higher Education study destination for EU/EEA students: Competitor analysis

December 2022

Executive summary



Executive summary: Introduction

Aims of this research

Between 2020 and 2022, there was a 65% drop in the number of EU undergraduate students accepted to UK universities.¹ As the principle NEA promoting UK Higher Education, The British Council's EU Higher Education team is therefore seeking to develop an evidence-based plan for the next year for attracting EU/EEA students to the UK. To inform this plan, this research aims to understand the value proposition of 6 competitor countries (see right) and the work of National Education Agencies (NEAs) in those countries, especially as it relates to the provision of English Medium Education (EME).




















The two key research questions covered in this work are therefore:

1. What is the value proposition of competitor countries and their degree-granting HEIs for attracting EU/EEA students?
2. What are the National Education Agencies in competitor countries doing to attract more EU/EEA students?

Methods of this research

This research has relied purely on secondary data. It has included:

- qualitative analysis of a range of online official and student-facing sources in key areas of interest, making use of a thematic framework
- developing a quantitative Value Proposition Index which generates scores for each country in five key categories based on 71 metrics
- qualitative content and thematic analysis of materials available on NEA websites
- quantitative content analysis of NEA social media posts

Countries	NEAs
 United Kingdom	 
 Canada	
 Germany	 
 Ireland	
 Italy	 
 Netherlands	 
 United States	 

This research in numbers

7 countries reviewed

71 metrics in the Value Proposition Index

9 National Education Agencies

1600 social media posts reviewed

200+ online sources reviewed








21 attendees at a recommendations workshop

Executive summary: Understanding the value proposition of competitors

This research assessed each of the 7 countries in 5 categories: (1) Quality of education, (2) Student finance, (3) Application and visas, (4) Lifestyle, (5) Opportunities for the future. The key insights were that:

- **Quality of education is high in the UK**, with a diverse range of HEIs to choose from, lots of highly-ranked institutions, strong student support services and high student satisfaction
- However, **studying in the UK is significantly more expensive** than in most competitor countries and the **requirement for a visa disadvantages it** compared to EU countries
- The UK and USA have broadly similar strengths and weaknesses, although **the USA scores significantly better on opportunities for the future** due to high graduate salaries, but has a **more complicated and expensive application and visa processes**
- Meanwhile, **European countries tend to score significantly worse on quality of education, but more highly on student finance and application and visas**, largely because they offer home fees for international students and do not require a visa
- **Germany scores particularly highly on student finance** as it charges no tuition fees to EU students, bar a €300 registration fee
- **Comparing student lifestyle across the competitors reveals a more complex picture**, with the UK scoring relatively well on language and social environment, but poorly on nature and culture







Average country ranking on relevant metrics (out of 7)

		Quality of education	Student finance	Application and visa	Lifestyle	Opportunities for the future
	UK	2.3	5.4	4.5	4.2	4.0
	Canada	4.4	4.2	6.3	3.4	4.7
	Germany	4.4	1.8	2.8	4.0	3.1
	Ireland	4.2	4.4	2.9	5.1	4.4
	Italy	5.6	2.7	2.6	4.7	5.6
	Netherlands	5.0	3.3	2.9	3.1	3.3
	US	1.9	6.2	6.1	3.7	3.0

Executive summary: Learning from competitor National Education Agencies (NEAs)

Key insights from assessing the activities and messaging of 9 NEAs were:

- **NEAs in different countries have different remits**, with some focusing purely on attracting international students and some promoting internationalisation in HE more broadly. The **British Council, DAAD and Nuffic all have similarly wide remits** and run similar awareness campaigns in Study UK, Study in Germany and Study in NL
- **Students from Germany, France and Spain are the most commonly targeted in the EU**; however, other EU countries with many outbound students are not being targeted (see top right)
- **NEAs most actively promote STEM subjects**, especially technology-related subjects
- The British Council's messaging is strongly focused on quality of education and career opportunities, whilst **other NEAs more strongly promote their country's lifestyle**
- The **British Council offers an extensive range of services to prospective students**, although other NEAs offer several other interesting services (see middle right)
- The **British Council/Study UK is the only NEA with an online engagement platform specifically targeting EU students**, although this is not well signposted online
- The **British Council provides some of the widest ranging support to education advisers**, but as with the platform for EU students, this is not well signposted online
- NEAs take **a wide range of approaches to engage prospective students on social media** (see bottom right)

Most targeted EU countries		
Germany 	France 	Spain 
Other countries with many outbound students		
Italy 	Greece 	Romania 

Other services for prospective EU students		
 <p>A world of possibilities Un monde de possibilités</p> <p>A database of virtual tours of HEIs</p>	 <p>HE summer programmes for teenagers</p>	 <p>Live chat with student ambassadors</p>

Engagement approaches on social media
Weekly takeovers by international students
Regular linking to HEI websites
Posting in a range of languages
Running country-specific accounts in target countries

Contents

	Slide
1 Introduction	8
2 Methodology	15
3 Country profiles	18
4 Understanding the value proposition of competitors	26
5 Learning from competitor National Education Agencies	49
6 Learning from HEIs in competitor countries	66
7 Considerations for the UK HE Sector	72

Glossary of terms and abbreviations

Term	Meaning
English Medium Education	The use of English to teach and learn academic content in contexts where English is not the primary language of communication for the majority of the population. Also sometimes referred to as English-medium Instruction (EMI)
Fractional ranking	A system of ranking in which items that with equal values receive the same ranking number, which is the mean of what they would have under ordinal rankings. E.g. if two countries have the 2 nd best score, they will each be given rank 2.5.
Index	A composite statistic which aims to ascertain the value of a complex and multi-faceted social phenomenon (e.g. the value proposition of a country for Higher Education students) by aggregating values from multiple more specific indicators
Percentage point	The additive difference between two percentages. For example, moving up from 40 percent to 44 percent is an increase of 4 percentage points, but a 10-percent increase in the quantity being measured
Triangulation	Using multiple datasets, methods, theories and/or investigators to address a research question and reach a conclusion

Abbreviation	Meaning
EEA	European Economic Area
EME/EMI	English Medium Education/Instruction (see left)
ESL	English as a Second Language
EU	European Union
HE	Higher Education
HEI	Higher Education Institution
IEFA	International Education Financial Aid
IELTS	International English Language Testing System
NEA	National Education Agency
OECD	Organisation for Economic Co-operation and Development
p.p.	Percentage point (see left)
STEM	Science, Technology, Engineering and Maths

1. Introduction



International study in the UK offers substantial benefits for the UK, the EU countries sending students, and the students themselves

With a worldwide reputation for excellence in international Higher Education (HE), the UK remains a top destination for international students. The key benefits of international study in the UK are outlined below.

Economic benefits for the UK

- Direct financial contribution through tuition fees, student expenditure, and visitors to see students
- Increase in skilled migration through graduates staying to work in the UK
- Development of international professional and trading networks
- International collaborations in research and education

Non-economic benefits for the UK

- Enriching the diversity of university campus life
- Alumni as informal UK ambassadors, developing educational and cultural links with the UK
- Promotion of trust in the UK, encouraging greater economic and political partnership

Benefits for international students

- Career enhancement or facilitation of career change
- English language proficiency
- Cosmopolitanism and intercultural sensitivity from interaction with other students
- Personal growth and wider experiences
- Social benefits and international networks

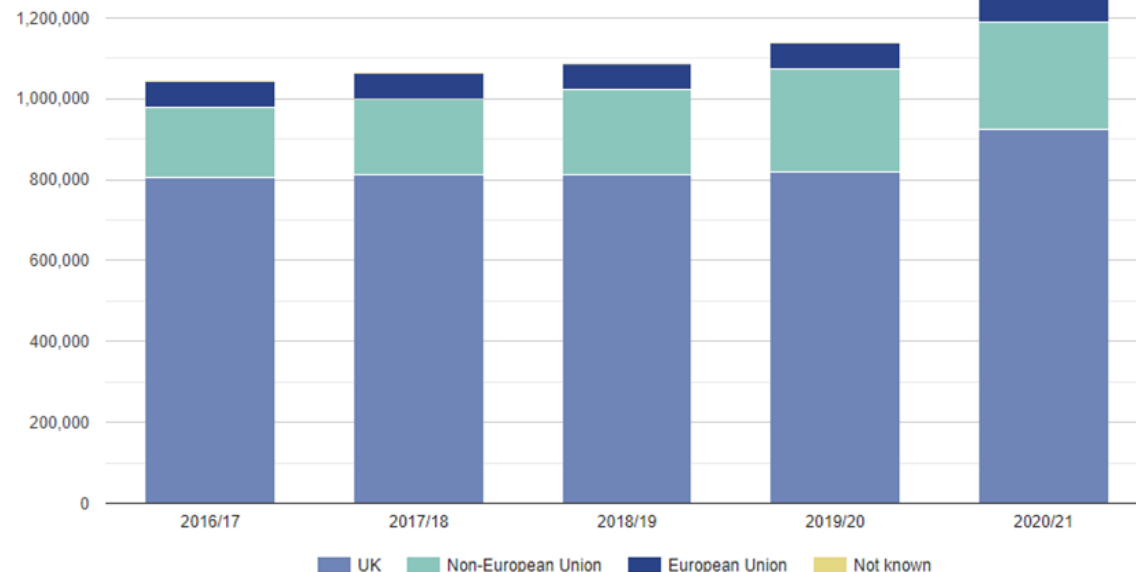
Benefits for source countries

- Upskilling of future workforce
- Development of international professional and trading networks
- Personal multiplier effects, as well-educated alumni educate others

International study continues to grow worldwide, although rapid growth in demand from emerging economies is unlikely to continue in the long-term

- The international Higher Education market has grown rapidly in recent decades, globally averaging annual growth of 5.5% since 1990¹. Data from 2021 suggests Covid has not had as large an impact on student numbers as expected²
- The most international students currently hail from Asia, specifically China, India and Vietnam, although 14.4% of the international student population worldwide is from the EU/EEA¹
- However, evidence suggests that growth in demand from emerging economies, including China, will likely slow and stagnate in the coming years³, as the international wage gap reduces and the quality of education at the source country improves
- This reinforces the importance to the UK of attracting international students from closer and more developed countries, including those from the EU/EEA

First year student enrolments in the UK by domicile and level of study, 2016/17 to 2020/21²



Countries with the most outbound international students in 2020¹

Rank	Country	International students
1	China	1,088,000
2	India	516,000
3	Vietnam	133,000
4	Germany	124,000
5	United States	110,000
6	France	109,000

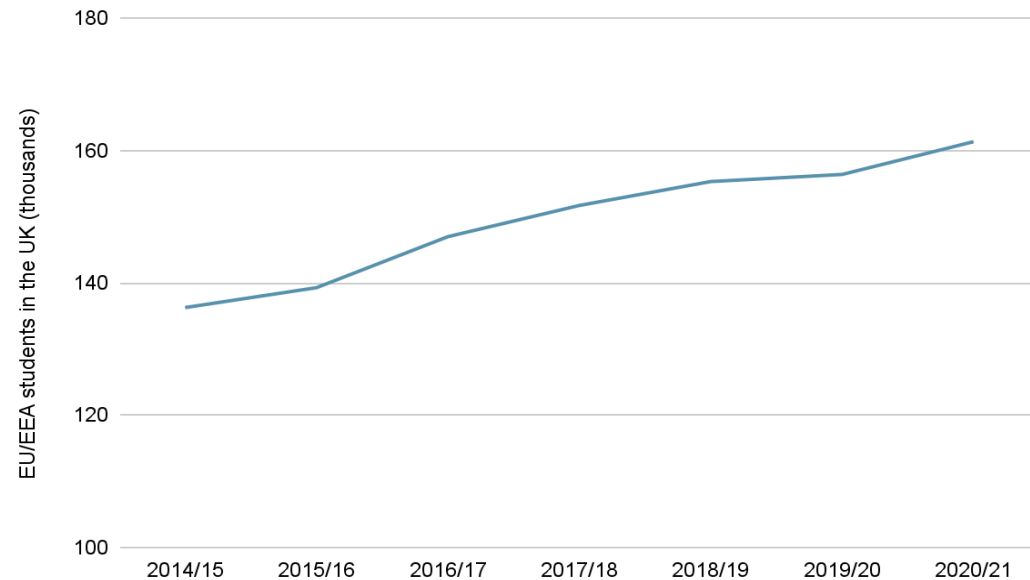
Sources: ¹ UNESCO Institute for Statistics, ² HESA, ³ Oliver Wyman

Notes: Figures from the UNESCO Institute for Statistics (UIS) are the best available; however, figures for 2020 in the table to the right are UIS estimates based on data from previous years for all countries other than China

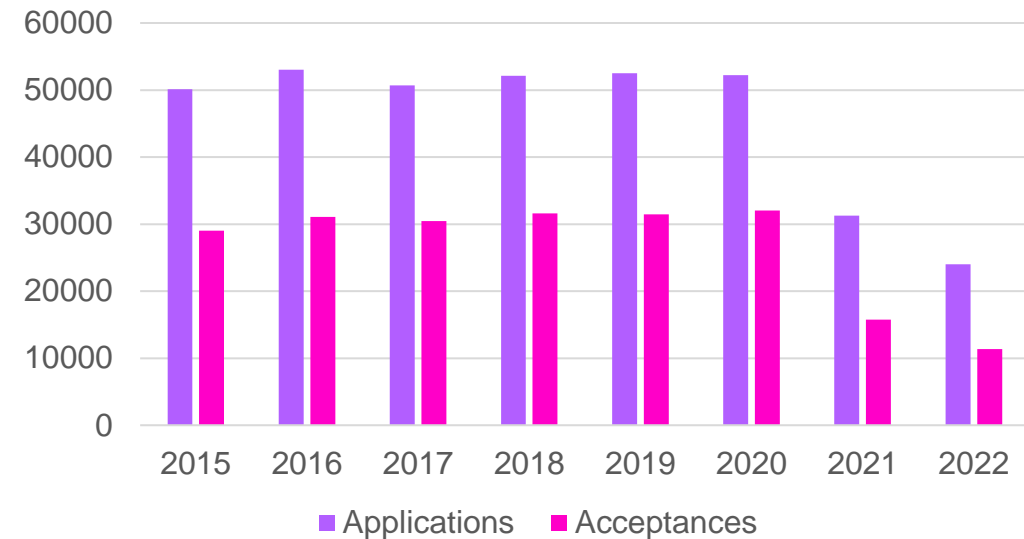
Brexit has contributed to a sharp downturn in EU/EEA applications to UK Higher Education Institutions in 2021, which is likely to continue

- The number of EU/EEA students in the UK increased steadily in the years leading up to 2020/21, with annual growth of 2% from 2011 to 2020¹
- However, UCAS data shows that between 2020 and 2022, there was a 54% decrease in the number of EU undergraduate applications to UK universities and a 65% drop in the number of EU students accepted to UK universities²
- Meanwhile, Studyportals data show a 28% decline from 2019 to 2021 in the number of pageviews of UK courses on the platform, equating to a 5.9% loss of share of total European student interest for the UK³. As students typically start researching their programme options 6–24 months before enrolment, the fall in UK applications will likely continue into 2023³
- The Centre for Economic Research has suggested Brexit has played a significant role in this reduction in EU applications⁴

Number of EU/EEA students in the UK, 2016/17 to 2020/21¹

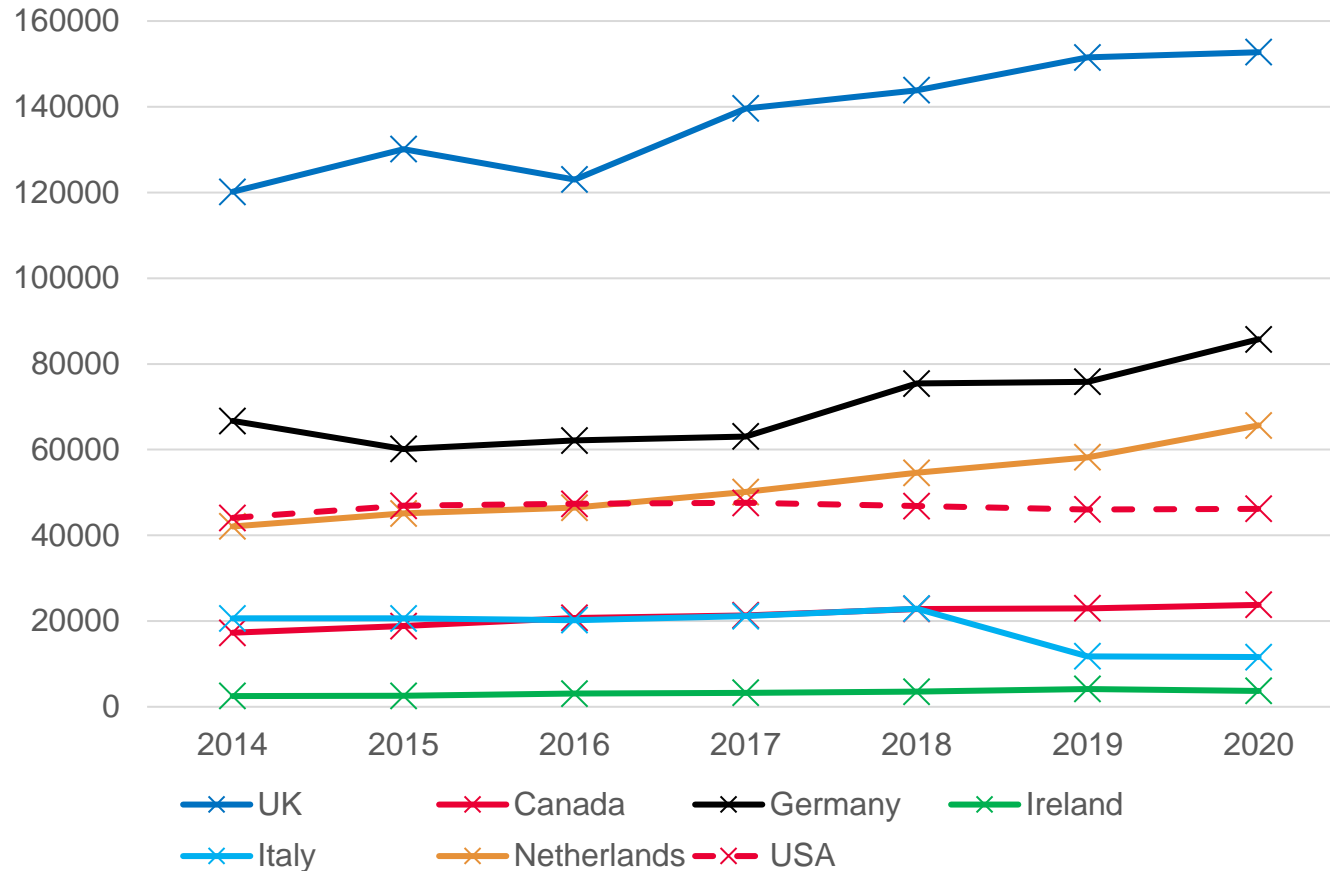


Undergraduate applications and acceptances from the EU through UCAS, 2015 to 2021²



While the UK has historically been the top destination for EU/EEA students, Canada, Germany, and the Netherlands saw strong growth between 2011 and 2020

Inbound EU/EEA students by destination country, 2011-2020²



Key takeaways

- The UK saw **2% average annual growth** between 2011 to 2020, but has since seen a significant decline in EU/EEA numbers in 2021 and 2022
- If other countries remain constant, the **65% drop in UK entrants** will mean the UK falls to second place, behind Germany, in 2022
- Canada (8%), Netherlands (8%), and Germany (6%), each saw significant annual average growth over this period
- Italy saw its EU/EEA student numbers fall by more than 50% in 2019, having been fairly consistent prior to this¹

Notes: ¹ We have not been able to verify this from an alternative source, as this decline is somewhat surprising.
 Sources: ² [UNESCO Institute for Statistics](https://www.unesco.org/en/unesco-institute-for-statistics). Inbound internationally mobile students by continent of origin. Data only available up to 2020.

This research aims to learn about 6 competitor countries to support the British Council EU HE team to develop an evidence-based strategy for attracting more EU/EEA students to the UK

The British Council EU Higher Education team wants to develop **an evidence-based plan for the next year for attracting EU/EEA students** to the UK, drawing inspiration from greater understanding of competitor countries.

To develop such a strategy, the first step is to understand **the value proposition** of 6 competitor countries (Canada, Germany, Ireland, Italy, Netherlands, and USA) and **the work of National Education Agencies (NEAs)** in those countries.

This research therefore aims to answer two research questions:

Research question 1:

What is the value proposition of competitor countries and their degree-granting HEIs for attracting EU/EEA students?

Research question 2:

What are the National Education Agencies in competitor countries doing to attract more EU/EEA students?

In understanding these questions, we have developed a quantitative index comparing the 6 competitor countries and the UK, as well as qualitatively analysed key features of the value proposition to students across these countries. We have also undertaken a mixed methods analysis of the activities and social media of the NEAs in each country. Findings are illustrated using **case studies of Higher Education Institutions** in each country.

To develop these findings, we have reviewed over 200 online sources, a range of official datasets and over 1600 social media posts, alongside consulting the British Council teams in 4 of the 6 countries.

The 6 competitor countries have been chosen according to their large or increasing market share of EU students; one or two National Education Agencies in each country will be reviewed

 **Canada**

 EduCanada
A world of possibilities
Un monde de possibilités

 **United States**

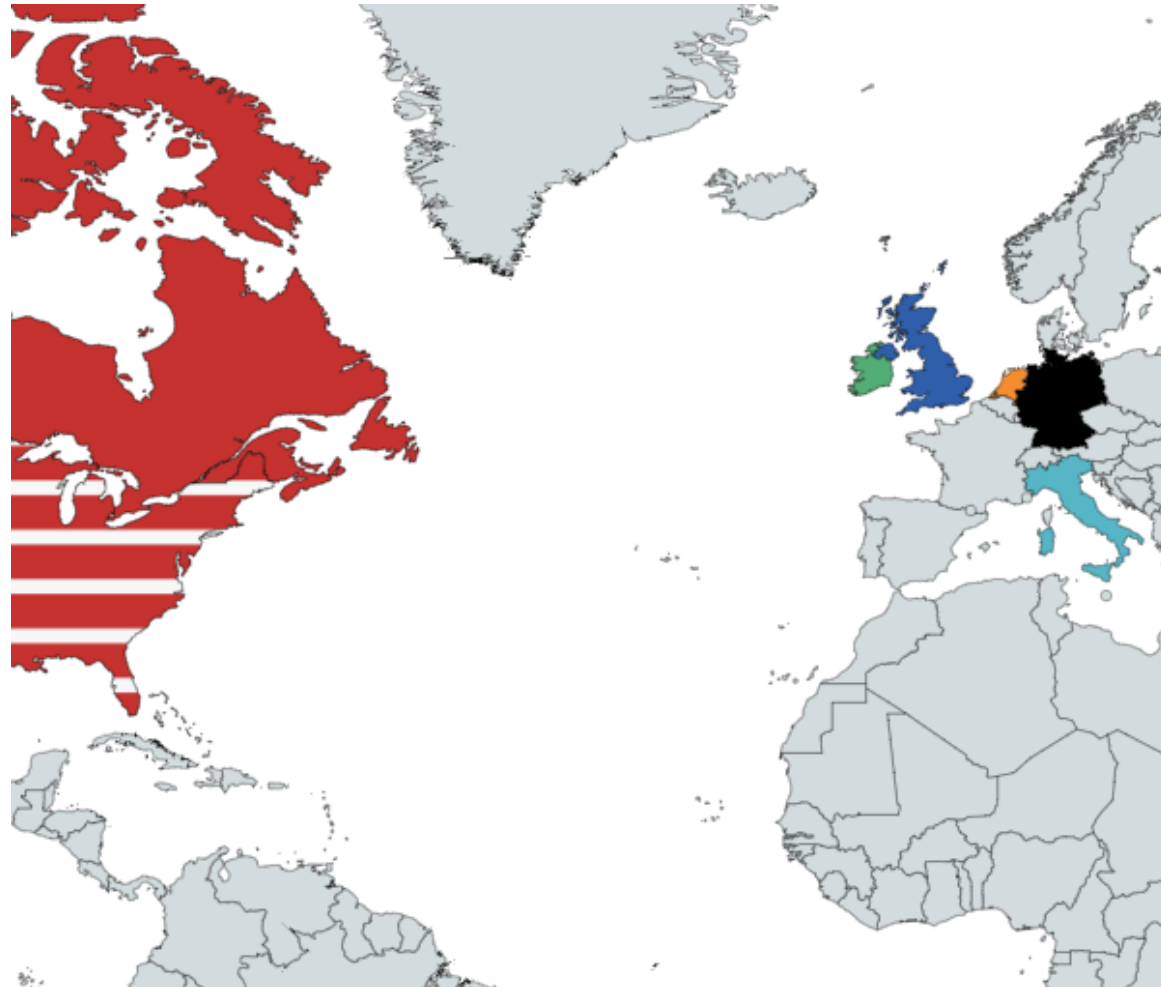
 Education USA

 study in the USA

 **Ireland**

 EDUCATION IN IRELAND
WORLD-CLASS STANDARDS
WARMEST OF WELCOMES

Notes: Although Study in the USA is not a government-backed campaign, it is covered in this research as an effective advocate for studying in the USA



 **United Kingdom**

 BRITISH COUNCIL

 GREAT
BRITAIN & NORTHERN IRELAND

 **Netherlands**

 nuffic
meet the world

 study in NL


 **Germany**

 DAAD

 Study in Germany
Land of Ideas

 **Italy**

 Uni-Italia

 SI STUDY in ITALY

2. Methodology



Research Question 1: What is the value proposition of competitor countries and their degree-granting HEIs for attracting EU/EEA students?

To answer Research Question 1 and understand the value proposition of competitor countries, we undertook two key activities:

1. **qualitative analysis of online sources** in key areas of interest
2. **compilation of a quantitative Value Proposition Index**, scoring each competitor country in key areas of interest

1. Qualitative analysis of online sources

To understand the full value proposition of each competitor country, we collated qualitative information from **a range of online sources** in key areas of interest.

We created **a thematic framework**¹ to structure this content, based on a theoretical model of student value. This framework covered all the key information required by the British Council to inform their work promoting the UK as a study abroad destination for EU students, whilst also drawing on academic sources and The PSC's previous experience in Higher Education.

Wherever possible, **official sources were used** including the websites of national governments, the websites of National Education Agencies, and official statistics.

2. Compilation of a Value Proposition Index³

To aid comparison of the value proposition across competitor countries, we developed a quantitative Value Proposition Index which generates **scores in five key categories based on 71 metrics**. The five categories are: (1) Quality of education, (2) Student finance, (3) Application and visas, (4) Lifestyle, (5) Opportunities for the future.

The seven countries were **fractionally ranked for each metric**. These rankings were then averaged to produce scores out of 7 in a number of sub-categories. Sub-category scores were then further **averaged to reach scores out of 7 for each of the 5 main categories**.

As values for many metrics varied between sources, for many metrics we collected data from several sources in order to enable **triangulation**.

Research Question 2: What are the National Education Agencies in competitor countries doing to attract more EU/EEA students?

To answer Research Question 2 and understand the work of National Education Agencies (NEAs) in competitor countries, we drew on two key sources:

1. **the websites of NEAs**, including any publicly available annual reports or strategy documents
2. **the social media of NEAs**, covering Facebook, Twitter, Instagram, Tiktok and LinkedIn

1. Analysis of websites

To understand the full range and specific nature of the work undertaken by NEAs, we undertook a **qualitative content and thematic analysis** of materials available on their website, including any publicly available annual reports or strategy documents.

For NEAs with a separate website for their Higher Education promotional campaign, we reviewed **both the main NEA website** (e.g. Nuffic) **and the promotional website** (e.g. Study in NL).

To aid this analysis, we used **a bespoke framework¹** to organise the content in a consistent manner. This framework covered all the key information required by the British Council to inform their work promoting the UK as study abroad destination for EU students.

2. Analysis of social media

To understand how NEAs use social media to attract international students, we undertook **quantitative content analysis** of their social media posts.

Once more, we used **a bespoke framework¹** to organise this content in a consistent manner.

We collected data on **the reach of NEAs - in terms of followers and posts** - across all 5 social media platforms listed above.

However, as it became clear that NEAs reproduced most of the same content across social media platforms, we only undertook **detailed analysis of the content of the two social media platforms where NEAs had the largest following**, from 1st September - 30th November 2022.²

3. Country profiles





United Kingdom



Summary

The UK has a large HE sector with many of the most highly-ranked universities in the world. It also attracts the highest proportion of international students of any competitor countries. However, it has seen a substantial fall in applications from EU students in recent years. Studying in an English-speaking European country is attractive to many students, and UK HE offers strong student services and good employment prospects. However, tuition fees are substantially more expensive than anywhere else in Europe and the government provides no financial support to EU students.

Strengths:

1. High quality education with many highly-ranked institutions and excellent student services, reflected in very high completion rates
2. The UK is a great place for students to learn English, and the language enables them to easily navigate the country, university and job market
3. The UK has many options for further study and a high graduate employment rate

Weaknesses:

1. Tuition fees in the UK are expensive, and the national student finance system offers no support for EU students
2. The requirement for a visa provides an additional barrier to studying in the UK for EU students
3. The lifestyle in the UK is not as well perceived as some competitors, particularly in terms of food, weather and natural beauty

British Council and Study UK

- The British Council promotes cultural relationships between the people of the UK and other countries, including through education, promoting the English language, arts and culture. Its Study UK campaign specifically focuses on attracting international students to UK HE.
- Although Study UK largely targets emerging economies in Asia, the British Council EU HE team's priority countries in Europe are Germany, France, Spain and Poland.
- The British Council and Study UK's key messaging focuses on the quality of HE in the UK, and associated career opportunities
- The British Council offers similar services to prospective students to many competitor NEAs, but provides some of the most extensive support to education advisers, alumni and HEIs



Canada



Summary

Considering its population size, Canada has a large HE sector with a wide range of private and public universities and community colleges. Of the countries assessed, it has the second most international students as a proportion of the total student body.¹ There are some highly-ranked HEIs but far fewer than in the UK or USA. The lifestyle in Canada is a key strength for attracting international students, although the application process for HEIs is complex and expensive. Tuition fees are cheaper than in the UK and USA but more expensive than in the EU.

Strengths:

1. Canada is highly multicultural and welcoming country, with a large international student body and progressive attitudes
2. Canada is a country of natural beauty, with many opportunities for outdoor activities
3. Canada has a large HE sector with many course options for students, including options for further study

Weaknesses:

1. International student satisfaction is lower in Canada than in competitor countries
2. The application process in Canada is expensive and complicated, with no centralised application portal, and EU students require visas
3. Graduate employment rates in Canada are lower than in European countries

EduCanada

- EduCanada is a government organisation specifically focused on attracting international students to Canada, largely through provision of online information
- Its key target countries are Mexico, Brazil and Vietnam, whilst it most actively promotes courses in STEM subjects, especially Environmental and Earth Sciences, Life Sciences, Artificial Intelligence and Quantum Technologies
- EduCanada's key messaging focuses on the high quality of life in Canada, drawing on its natural beauty, multiculturalism and safety
- Unique features of EduCanada's work include its collation of virtual tours of HEIs from around the country and its accreditation for education advisers, which requires the passing of an exam
- However, it has a limited social media presence and offers limited support to alumni or Canadian HEIs



Germany



Study in
Germany
Land of Ideas

Summary

Germany is an attractive international destination for EU students due to its free and high-quality public universities. Whilst Germany specialises in STEM subjects, it offers a wide range of courses at both its Universities and its Universities of Applied Sciences. There are no visas required or tuition fees for EU students, and DAAD offers generous scholarships to support international students with living costs. However, the course completion rate for international students is very low. Public universities are often oversubscribed, have poor staff to student ratios and limited pastoral care.

Strengths:

1. German HEIs charge no tuition fees for EU students and government loans are available to support with the cost of living
2. Graduate employment rates in Germany are high, and graduates earn high incomes on average
3. The cost of living in Germany is relatively low in comparison to most competitor countries

Weaknesses:

1. German HEIs offer limited support services to international students resulting in a high drop-out rate
2. English is not widely spoken in Germany, making it difficult for some international students to navigate their HEI and wider society
3. There is relatively high concern about finding housing amongst young people, with limited designated student accommodation available

DAAD and Study in Germany

- DAAD supports the internationalisation of German HE through supporting inbound and outbound student mobility and building academic networks. Its core focus is providing scholarships for international students in Germany and German students abroad
- However, it also runs the 'Study in Germany' marketing campaign to attract students to Germany, in collaboration with the Federal Ministry of Education and Research
- DAAD and Study in Germany's key messages focus on how Germany offers high-quality education at low prices; they also focus strongly on providing practical information for prospective students
- DAAD actively supports alumni through grants for professional development and career coaching, whilst also supporting HEIs to develop partnerships abroad



Ireland

Summary

The Irish Higher Education landscape has shifted substantially in recent years as many smaller Institutes of Technology have merged into 5 large, multi-campus Technological Universities. Ireland is attractive to EU students due to the opportunity to study in a native English-speaking country without a visa. Whilst there are officially 'no tuition fees', all students pay a €3000 registration fee meaning Ireland's fees are middling in a European context. A key weakness for Ireland in attracting EU students is the significant cost of living, especially in Dublin.

Strengths:

1. Irish HEIs have high student satisfaction amongst international students, and strong student support services
2. Ireland has a cheap and centralised application process, whilst EU students do not require a visa
3. As the only native English-speaking country in the EU, Ireland is a great place for students to learn English

Weaknesses:

1. Ireland has a smaller HE sector than competitors and fewer highly-ranked universities
2. Ireland is perceived to have fewer cultural and natural attractions than competitors, and many find the weather unappealing
3. Tuition fees are higher in Ireland than amongst EU competitors, whilst the cost of living is second only to the USA

Education in Ireland

- Education in Ireland is a government body specifically focused on attracting international students to Ireland, largely through provision of online information and outreach events
- It strongly targets students from emerging economies such as India, Brazil and Mexico, although its key European target seems to be Spain
- Its key messages are that Ireland is a friendly and welcoming place to study, there are great career opportunities and that it is the only native English-speaking country in the EU
- Education in Ireland is more focused on education fairs for advisers and prospective students than many competitors
- Education in Ireland has one of the largest social media presences of competitor NEAs, especially on Facebook, in large part due to its country-specific pages (e.g. Education in Ireland India)



Italy



Summary

Italy has not historically been a major destination for EU students, but has seen substantial growth in recent years due to a strong internationalisation agenda pursued by Italian universities, including the provision of more EME courses. Low fees, low cost of living, no visa requirements and an appealing lifestyle makes Italy attractive to EU students. Italian HE is well-regarded for arts subjects, with 141 Arts, Music and Dance colleges (AFAM) across the country. However, its universities are not as highly ranked internationally as those of competitors.

Strengths:

1. Italy is perceived as having many cultural and natural attractions, the best weather and the best food amongst all competitors
2. Italian HEIs charge no application fees and EU students do not require a visa
3. Tuition fees are very low and the cost of living is cheaper than in many competitor countries, especially for housing

Weaknesses:

1. Italy has relatively few highly-ranked HEIs and offers limited support services to international students
2. English is not widely spoken in Italy, making it difficult for some international students to navigate their HEI and wider society
3. Italian graduates have lower employment prospects and earning potential than in competitor countries

Uni-Italia and Study in Italy

- Two government institutions promote Italian study abroad. Whilst Uni-Italia engages in proactive outreach with prospective students through social media and events, Study in Italy is largely an online information platform. However, the two organisations are due to merge in the coming years.
- Uni-Italia strongly targets emerging economies in Asia, with its primary targets being China, India, Indonesia, Iran and Vietnam
- Key messages for both Uni-Italia and Study in Italy focus on the quality and affordability of Italian Higher Education
- Uni-Italia offers a range of support to international students including welcoming days and an information hotline
- Uni-Italia has separate social media pages for each of its target countries; however, it has a small presence overall. Study in Italy has no social media presence.



Netherlands

nuffic
meet the world

study in NL

Summary

The Netherlands has been highly successful at attracting international students in recent years to both its Universities and Universities of Applied Sciences, most notably due to the high proportion of courses offered in English. The fees are relatively low, EU students require no visas and students have strong graduate employment prospects. A key issue for international students is the availability of housing. Due to recent political backlash at the high numbers of international students, some universities are considering putting limits on the number of international students.

Strengths:

1. Adapting to life in the Netherlands is easy with efficient public transport, accessible healthcare, safe streets and good English skills
2. Graduates in the Netherlands are the most likely to be employed and earn more than in all other competitors except the USA
3. Tuition fees and cost of living are relatively low, and the government offers universal loans to cover fees

Weaknesses:

1. The Netherlands has a smaller HE sector than most competitors, with fewer highly-ranked institutions
2. International student satisfaction is lower in the Netherlands than in most competitor countries
3. The Netherlands is perceived as having fewer cultural and natural attractions than some competitors

Nuffic and Study in NL

- Nuffic is a government-funded organisation which has historically focused on promoting the Netherlands as a study abroad destination; however, its focus is now shifting to supporting Dutch students to study abroad due to concerns about student housing pressures in the Netherlands
- However, Nuffic still runs the Study in NL campaign which aims to promote the Netherlands as a study abroad destination
- Nuffic and Study in NL primarily target Asian countries, namely India, Indonesia, Vietnam and South Korea
- Nuffic's key messaging is relatively diverse, but it regularly stresses the wide range of English programmes available and high English proficiency in the general population
- Nuffic's social media posts in both Dutch and English, and Study in NL regularly uses student stories to promote the Netherlands



United States



Summary

The USA offers the largest range of HE courses and institutions in the world, with a diverse mix of state and private universities and community colleges. It also has many of the most highly-ranked institutions in the world, with 5 of the top 10 HEIs in the QS World University Rankings based in the USA. Studying in the USA is also attractive for the high graduate salaries. However, tuition fees at many HEIs are very expensive, and although lots of private scholarships are available, the USA government offers no funding support. The visa process is also complicated and expensive.

Strengths:

1. The USA has by far the largest HE sector with a great diversity of courses and institutions, and the most highly-ranked HEIs
2. Graduates in the USA earn substantially more (~80%) than in all other competitor countries
3. The USA is a highly multicultural and welcoming country, with the greatest cultural influence in the world

Weaknesses:

1. Tuition fees in the USA are on average very high, and there is no government funding support available to international students
2. The visa process is expensive, slow and complex, usually requiring an interview with a visa officer
3. The graduate employment rate is lower in the USA than anywhere else, and it's the hardest country to remain in post-graduation

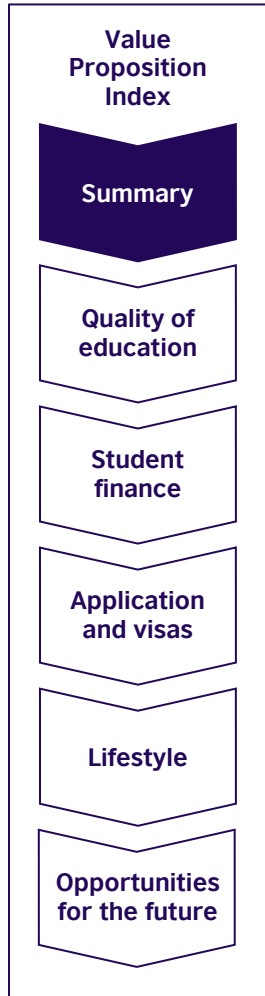
EducationUSA and Study in the USA

- EducationUSA is a government organisation focused on attracting international students to the USA. It has a global network of 175 Advising Centers around the world who support prospective students to study in the USA. It also offers HE summer programmes for teenagers and market intelligence for HEIs
- Study in the USA is a private company which uses its 'matching service' to connect USA HEIs with prospective international students, and provides various student support services including a platform for chatting directly with student ambassadors
- Whilst both organisations primarily target Latin American countries, especially Brazil and Mexico, Study in the USA also targets China, India and Vietnam
- A key message of both organisations is that with the diversity of high-quality courses and institutions in the USA, there is a perfect fit for every international student








4. Understanding the value proposition of competitors



The Value Proposition Index created by The PSC shows that whilst the UK ranks highly on quality of education, it falls behind on student finance and application and visas



Average country ranking on relevant metrics (out of 7)

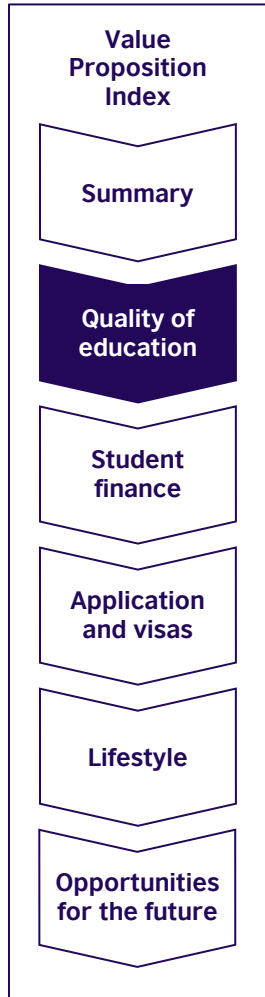
		Quality of education	Student finance	Application and visas	Lifestyle	Opportunities for the future	
	UK	2.3	5.4	4.5	4.2	4.0	1 = Best for attracting international students 7 = Worst for attracting international students
	Canada	4.4	4.2	6.3	3.4	4.7	1.0 <= x < 2.0
	Germany	4.4	1.8	2.8	4.0	3.1	2.0 <= x < 3.0
	Ireland	4.2	4.4	2.9	5.1	4.4	3.0 <= x < 4.0
	Italy	5.6	2.6	2.6	4.7	5.6	4.0 <= x < 5.0
	Netherlands	5.0	3.3	2.9	3.1	3.3	5.0 <= x < 6.0
	USA	1.9	6.2	6.1	3.7	3.0	6.0 <= x < 7.0

Key takeaways

1. The **quality of education is high in the UK**, but studying in the **UK is significantly more expensive** than in most competitor countries and the requirement for a visa disadvantages it compared to EU countries
2. The UK and USA have broadly similar strengths and weaknesses, although the USA scores significantly better on opportunities for the future and less favourably on application and visa processes
3. European countries tend to score significantly worse on quality of education, but more highly on student finance and application and visas, largely because they offer home fees for international students and do not require a visa

Source: This is the outcome of the country-level Value Proposition Index designed by The PSC. Scores are based on rankings from 71 metrics, generated from over 150 sources. As scores are averaged across all metrics in a category, this view obscures in-category variation of scores, but still provides a strong overall view of relative strengths and weaknesses for each country. See the full methodology in Appendix A3.

The UK Higher Education sector is larger than in most countries, but much smaller than in the US; the UK has the most international students in % terms. All data for 2020/2021



Whilst most European countries clearly distinguish between Universities and Universities of Applied Sciences, this distinction is less clear in the UK, Canada and the USA.

Germany

- 3.28m** total students
369k (11%) intl.
86k (3%) EU/EEA
- 108** Universities
- 210** Universities of Applied Sciences
- 104** Other HEIs

United Kingdom

- 2.73m** total students
551k (20%) intl.¹
153k (6%) EU/EEA¹
- 132** Universities
- 150** Specialist and technical colleges

Ireland

- 237k** total students
24k (10%) intl.
4k (2%) EU/EEA
- 8** Universities
- 5** Technological Universities
- 12** Other HEIs

Canada

- 1.77m** total students
323k (18%) intl.
24k (1%) EU/EEA
- 223** Universities
- 213** Colleges and institutes

Italy

- 2.03m** total students
102k (5%) intl.
23k (1%) EU/EEA
- 96** Universities
- 63** Technical Institutes
- 141** Arts, Music & Dance

Netherlands

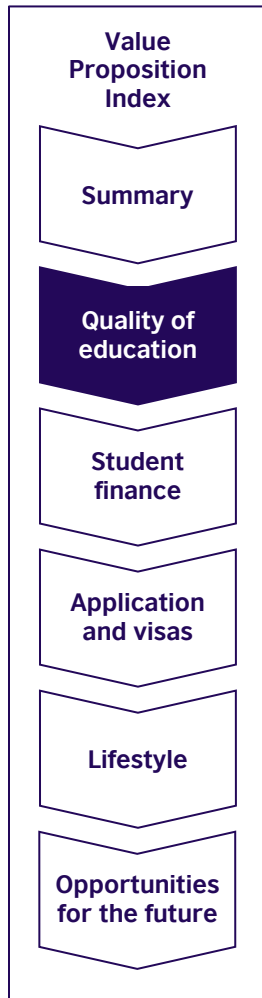
- 937k** total students
125k (13%) intl.
66k (7%) EU/EEA
- 13** Universities
- 41** Universities of Applied Sciences

United States

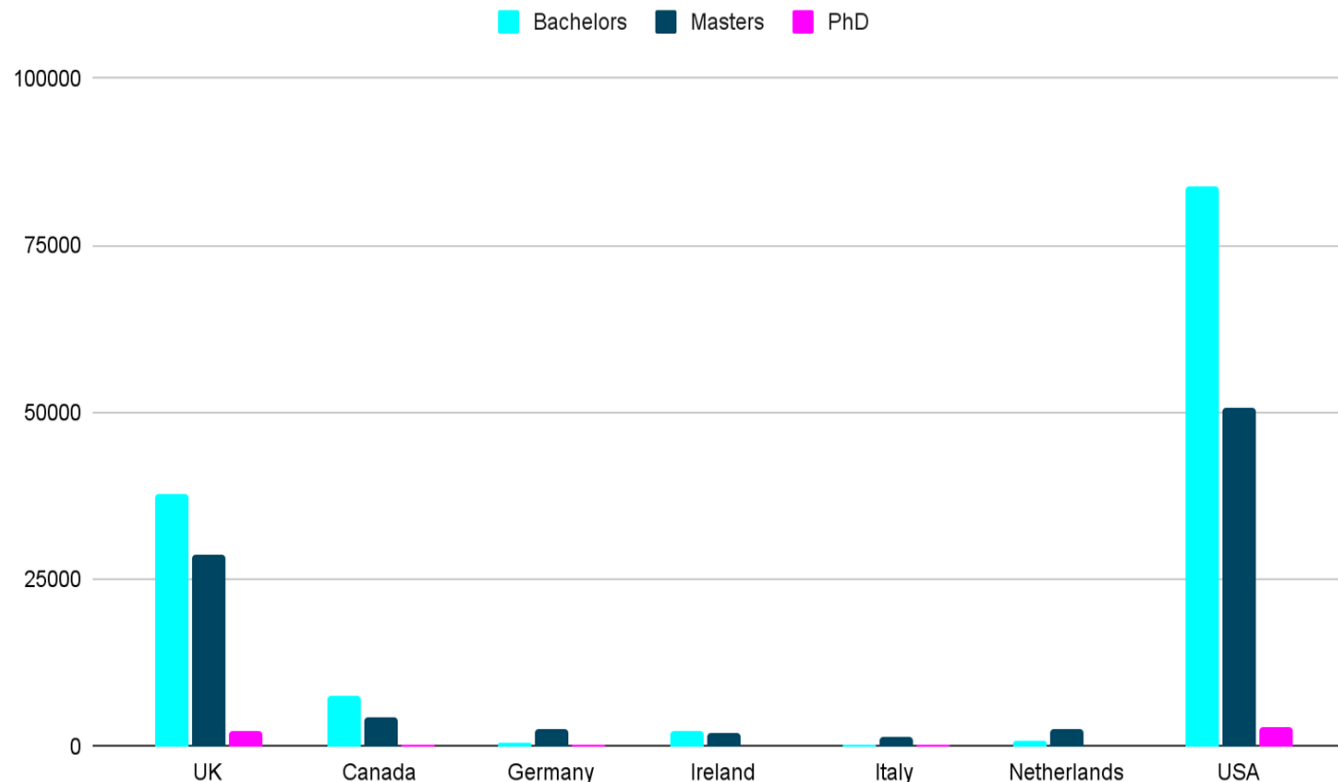
- 18.8m** total students
957k (5%) intl.
46k (0.25%) EU/EEA
- 1625** Public colleges
- 1660** Private non-profit colleges
- 717** For-profit colleges

Notes: These figures relate to the entire Higher Education sector in each country, not just those HEIs providing teaching in English; ¹ HESA figures for 21/22, show a significant shift with an increase to 680k total international students, but a decrease in EU/EEA students to just 120k. Sources: All student numbers data from [UNESCO Institute for Statistics \(UIS\)](#); excluding for Italy, where data from the [Italian Higher Education Ministry](#) was used due to discrepancies in the UIS data. Data on institutions from: [Study in UK](#), [Council of Ministers of Education, Canada](#), [DAAD, Higher Education Authority](#), [Euro Education](#), [Study in Holland](#), [Education Data Initiative](#), [US News](#)

On international HE search website Studyportals, there are by far the most courses taught in English in the USA and UK, improving access and choice for international students



Courses taught in English available on Studyportals by level of study and country in November 2022



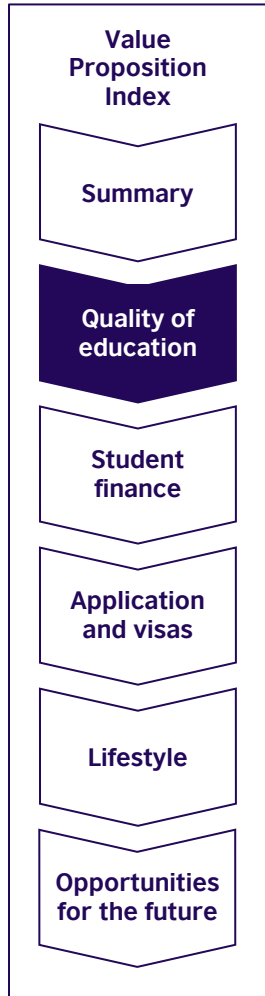
Key takeaways

1. There are **several times more courses taught in English in the USA and UK** on Studyportals than in any competitor countries, improving access and choice for international students
2. **Canada offers the third most courses in English** at every level of study
3. Of the remaining countries, Ireland offers the most Bachelors courses in English, whilst Germany and the Netherlands offer the most Masters courses in English








Notes: Studyportals data does not necessarily cover all available HE courses, but provides a clear indication of the variation in provision of courses taught in English between countries. Previous British Council research has concluded that the majority of HEIs offering EME courses advertise on Studyportals.

Sources: [Studyportals: Bachelors portal](#), [Studyportals: Masters portal](#), [Studyportals: PhD portal](#)

The USA and UK have by far the most prestigious Higher Education Institutions (HEIs), with 5 and 4 HEIs in the top 10 worldwide respectively



Global rankings of Higher Education Institutions by country, according to QS World University Rankings 2023¹

		Top 10	Top 20	Top 100	Top 500
	United Kingdom	4	5	17	46
	Canada	0	0	3	17
	Germany	0	0	3	29
	Ireland	0	0	1	5
	Italy	0	0	0	13
	Netherlands	0	0	2	13
	United States	5	9	27	83

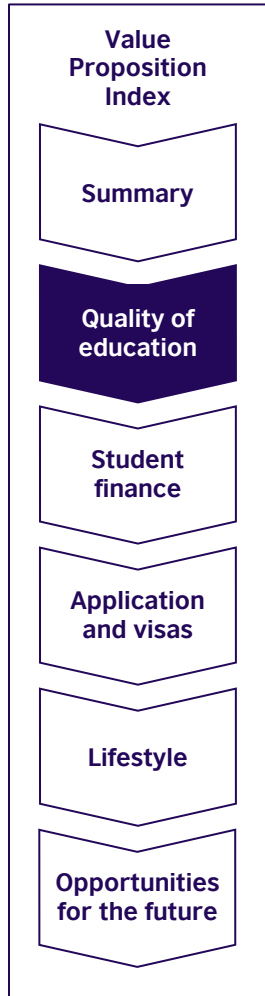
Key takeaways

1. The **UK and the USA have the most highly-ranked institutions** in world university rankings, suggesting they provide the highest quality education
2. Of the remaining countries, Germany and Canada have the next most HEIs ranked in the top 100 and 500 worldwide
3. However, it is important to note **the weight these rankings place on research output disadvantages certain countries** where more research takes place outside of HEIs (e.g. Germany)

Notes: Many challenge global university rankings as objective measures of the quality of HEIs due to a range of methodological concerns (e.g. [Gadd, 2021](#); [Brankovic, 2021](#); [Bellantuono, 2022](#)). In particular, the large focus on research output in most ranking systems (including QS) skews rankings in favour of HEIs in the USA and UK, where academic and research activity is concentrated in HEIs, and against other countries (e.g. Germany) where more research occurs outside of HEIs. However, these rankings are still widely used by students to assess the quality of HEIs and so remain a relevant metric to consider in this research. These figures include all HEIs in each country, not only those HEIs which provide teaching in English.

Source: ¹ [QS World University Rankings 2023](#)


World rankings suggest the UK specialises in Arts and Humanities, alongside Germany, Ireland and the USA; Canada and Netherlands are stronger in Life Sciences and Italy in Social Sciences



Using QS University rankings¹ by subject, this slide outlines the subject areas and subjects where each country has the most HEIs ranked in the top 200 globally.

Due to the nature of the rankings system, strongest areas and strongest subjects may not always align neatly.

	United Kingdom
Strongest area:	Arts & Humanities
Strongest subjects:	<ul style="list-style-type: none"> - History - Communication - Art & Design - Psychology - Politics - Business - Engineering

	Canada
Strongest area:	Life Sciences & Medicine
Strongest subjects:	<ul style="list-style-type: none"> - English language - Agriculture - Environmental Sciences - Hospitality - Geophysics

	Germany
Strongest area:	Arts & Humanities
Strongest subjects:	<ul style="list-style-type: none"> - Geology - Philosophy - Earth & Marine Sciences - Geophysics - Biology - Physics

	Ireland
Strongest area:	Arts & Humanities
Strongest subjects:	<ul style="list-style-type: none"> - Nursing - Law - Education - Modern Languages - Performing Arts - Politics

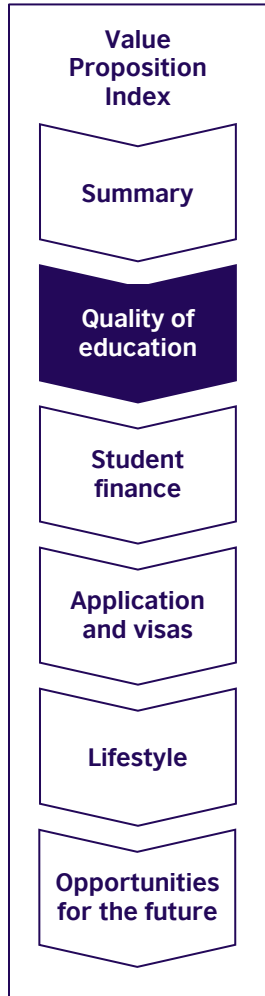
	Italy
Strongest area:	Social Sciences & Management
Strongest subjects:	<ul style="list-style-type: none"> - Archaeology - Agriculture - Law - History - Philosophy - Mathematics - Economics

	Netherlands
Strongest area:	Life Sciences & Medicine
Strongest subjects:	<ul style="list-style-type: none"> - Philosophy - Statistics - Psychology - Medicine - Communication - Economics - Biology

	United States
Strongest area:	Arts & Humanities
Strongest subjects:	<ul style="list-style-type: none"> - Communication - Geophysics - Nursing - Geology - Education - Psychology

Notes: ¹ As on previous slide, although many challenge global university rankings as objective measures of the quality of HEIs due to a range of methodological concerns (e.g. [Gadd, 2021](#); [Brankovic, 2021](#); [Bellantuono, 2022](#)), these rankings are still widely used by students to assess the quality of HEIs and so remain a relevant metric to consider in this research. Further Notes: this refers to courses in all languages, not just EME provision.
Source: [QS World University Rankings 2023](#)

There are good examples of English language support in the UK and the EU, with the UK having more of a focus on upfront “pre-sessional” language support

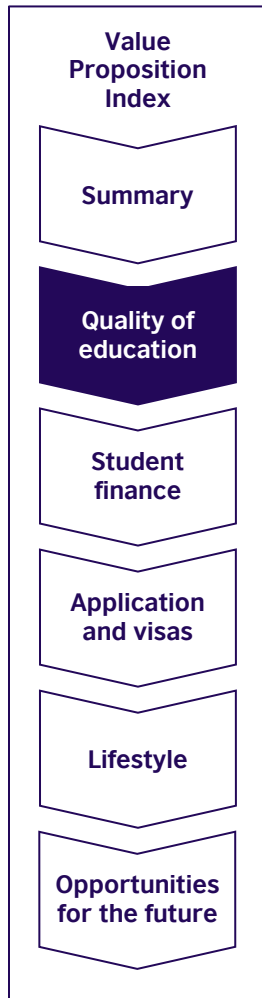


English-medium education and language support

- English medium education (EME), also referred to as English medium Instruction (EMI), is the use of English to teach and learn academic content in contexts where English is not the primary language of communication for the majority of the population, such as Italy. In English-majority speaking countries, such as the UK, despite the international make-up of staff and students, programmes taught through English are not regarded as EME.
- English language requirements for studying on EME courses in the EU and on courses in English-majority countries are broadly comparable (B2 CEFR). EME courses in the EU are, however, more likely to admit students with lower levels of English.
- When English is a second or other language for students, there usually needs to be support in place for learning English required for academic study - known as English for Academic Purposes (EAP).
- There are good examples of EAP provision in both the UK and EU. Support in the UK tends to focus on pre-sessional support (e.g. more intensive EAP courses before the beginning of HE studies), while support in the EU is more balanced across pre-sessional and in-sessional support (e.g. support alongside HE studies).¹ Both types of support typically come with additional fees for students. Support may be offered to academic staff teaching through English in the EU, but is unlikely to be offered in the UK.
- The UK HEI sector is seen as leading on EAP. The British Association of Lecturers in English for Academic Purposes (BALEAP) is a professional body for EAP practitioners, with many UK HEIs accredited by them.²



More research is needed on the differences between studying as a second language English student in an English-speaking country and a non-English speaking country

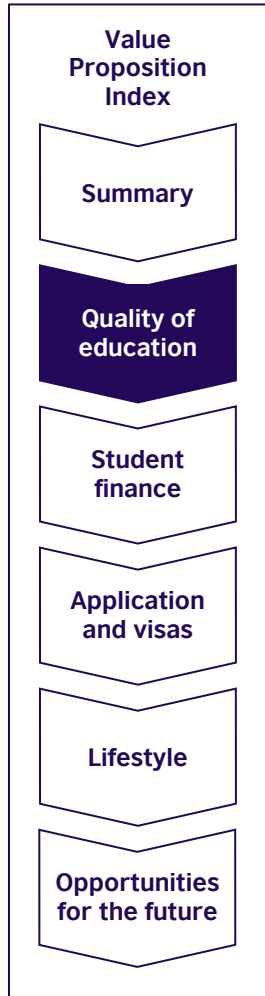


Comparing EME and English-taught programmes in majority English speaking countries

- There has been significant research into the phenomena and experiences of “Englishization” of higher education in non-anglophone countries - meaning the increasing prevalence of EMI, as well as wider use of English in HEIs in research, administration and communication
- However, there has not been any published research comparing EME and English-taught courses in majority-English speaking countries. Large scale research such as [English as a Medium of Instruction in European Higher Education](#), an Open University-led project, with the British Council as a partner, may provide further evidence.
- In many European nations, EME is a complex, contentious and divisive issue, for example, in the Netherlands “the [Dutch] media has publicly expressed concern about ... the future of Dutch as an academic language, the quality of education and the cultural identity of Dutch due to Englishization.”¹
- However, research has also found “...the majority of students studying under EME report positively on it overall”², and small-scale studies of the impact of studying in EMI versus home languages have not demonstrated EME has an adverse impact on outcomes³
- Previous British Council research has reported UK education providers indicating that with “the UK as the birthplace and the historical and cultural home of English, many students cite that as the reason they choose the UK over other English-speaking countries in which to continue their studies”.⁴



Support services for international students tend to be strongest in English-speaking countries and the Netherlands; less support is available in Germany and Italy



HEIs in the UK tend to offer a **wide range of support** to international students. This usually includes:

- An **international student office** for practical support
- A Student's Union with a **dedicated International Officer**
- A **personal tutor** assigned to each student
- **Accommodation** for the first year of studying
- International **student associations** to connect students from the same country
- **Writing centres** to support students who do not speak English as a first language
- Free **counselling services** for students
- **UKCISA** is a well-established charity offering additional support to international students



HEIs in Canada, Ireland, the Netherlands and the USA generally offer a **similarly extensive range of support** to international students. Additional support provided by some HEIs in these countries include:

- Canada: **mentoring programmes** to connect new international students with older students
- Netherlands: a **team of international student counsellors** who each specialise in different issues (e.g. finance, wellbeing)
- USA: **additional ESL support courses** for students who still want to improve their language skills



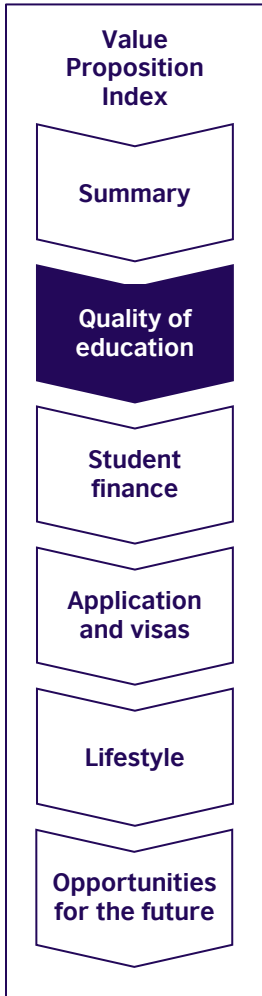
HEIs in Germany and Italy usually offer **less support to international students**. Although they still have International Offices, their Student's Unions tend to be less focused on supporting international students and they are less likely to offer counselling and wellbeing support.

In Germany, DAAD have identified a lack of support for international students, especially to overcome linguistic barriers, leads to a **high dropout rate** of international students.

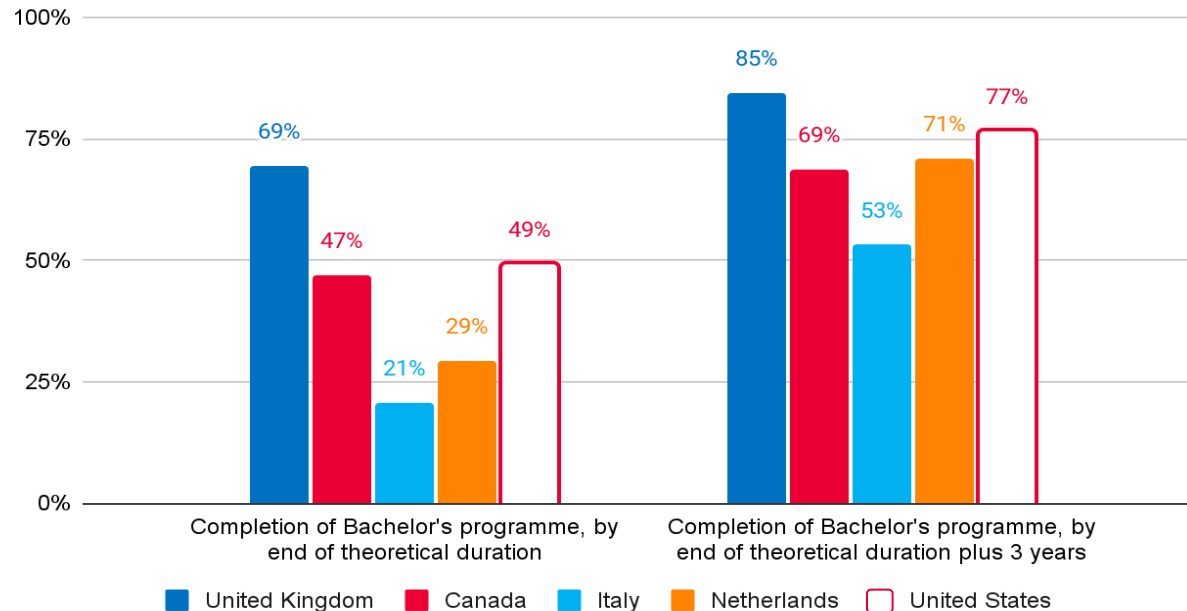
In Italy, Uni-Italia provide an **additional hotline for international students** to support them with practical issues when they are not supported by their HEI.

Find more details on support services for international students in Appendix B1

Completion rates for Bachelor's degrees are significantly higher in the UK than in competitor countries, suggesting may be students better supported throughout their studies



Completion of Bachelor's programme, by end of theoretical duration and end of theoretical duration plus 3 years for all students (domestic and international)¹



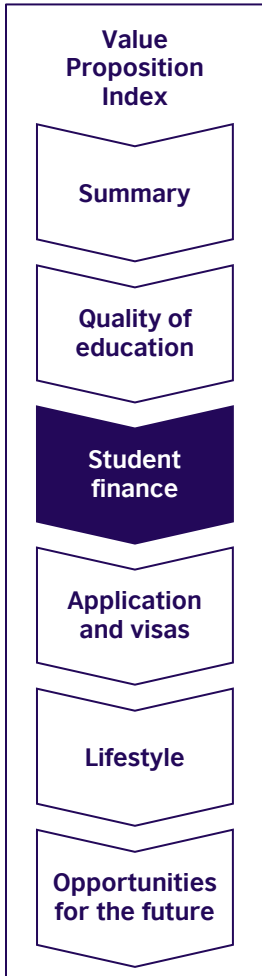
There is no comparable OECD data available for Germany or Ireland. However, other sources state the completion rate for domestic students is 72% in Germany, in comparison to 55% for international students, while other countries typically have similar completion rates for domestic and international students in that country.² Meanwhile, completion rates in Ireland are 83% for Universities but just 65% for Institutes of Technology.³

Key takeaways

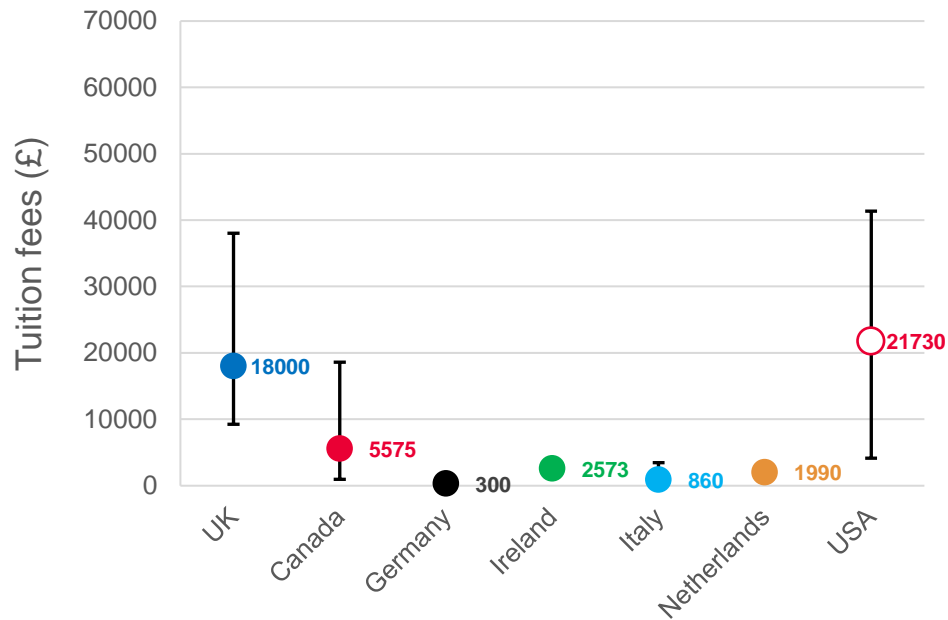
1. OECD data shows that students in the UK (both domestic and international) are at least **20 p.p. more likely than competitors to complete their Bachelor's degree** within the theoretical duration of the course
2. This stretches to a 48 p.p. gap when compared with Italy
3. The UK also maintains this lead when considering completion of Bachelor's programmes within the theoretical duration plus 3 years
4. Whilst **there is no directly comparable data available for Germany or Ireland**, other sources suggest their degree completion rates are also significantly lower than those in the UK

Sources: ¹ OECD, 2022; ² DAAD, 2019; ³ The Irish Times, 2021

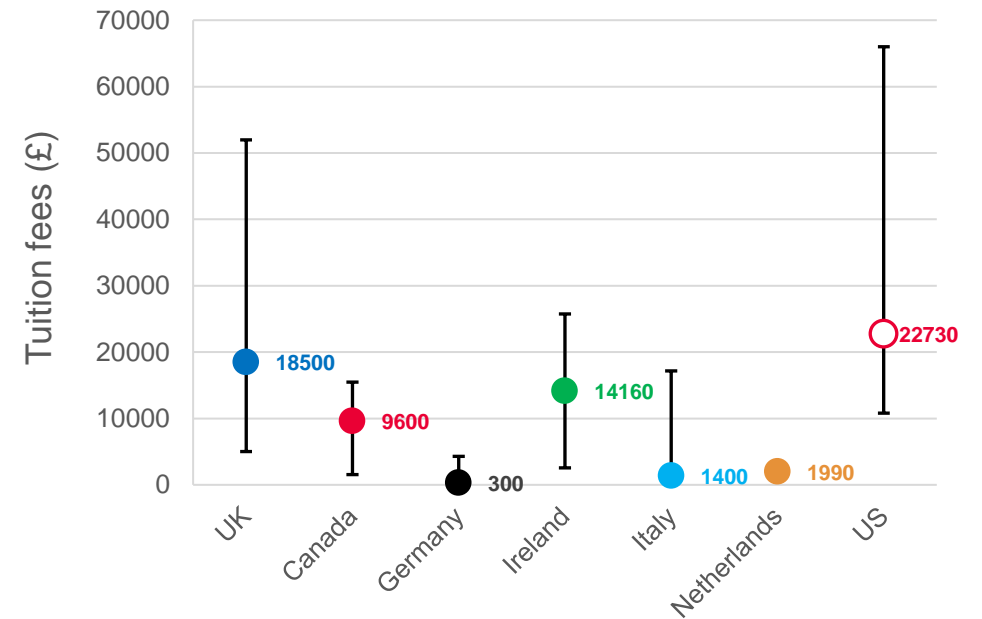
Whilst average tuition fees for EU students are highest in the USA, fees in the UK are far higher than in other competitor countries, especially for undergraduate study



Tuition fees for EU undergraduates at public universities



Tuition fees for EU postgraduates at public universities



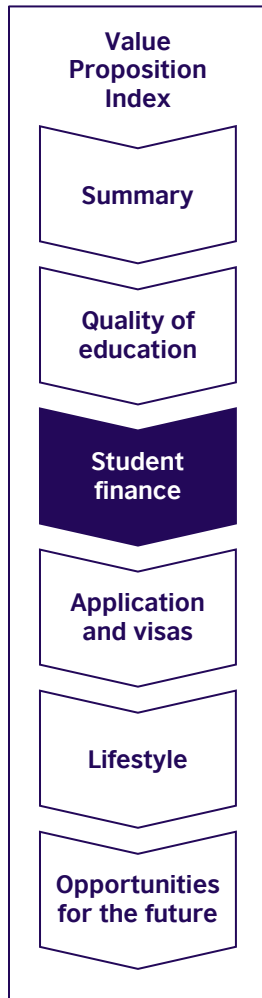
Key takeaways

1. Average **undergraduate fees in the USA and UK are more than 3 times higher** than the next most expensive destination of Canada
2. The lower bound of the UK's average fees (£9,250) is significantly higher than any other country, including the USA
3. **Germany is the cheapest destination** for both undergraduate and postgraduate tuition fees, while the USA has the highest average fees








Notes: These figures are for public universities only. Bars represent upper and lower limits of ranges of spend in each country as provided in student-facing sources, not the maximum and minimum cost of all courses. This approach was chosen as it avoids extreme outliers skewing the data. Tuition fees for private universities tend to be significantly higher across all countries. Where only one fee is provided, this is a statutory fee paid by all students at all HEIs. Upper bounds exclude courses known for being substantially more expensive (e.g. Law, MBA), which can reach £250,000 in the USA. These findings relate to courses provided in all languages, not just EME/English language courses. All currencies converted to GBP on 23 Nov 2022.

Sources: [British Council: Study UK](#), [Top Universities](#), [Studyportals: Masters portal](#), [Save the Student](#), [Jeduka](#), [Statistics Canada](#), [Prospects](#), [DAAD](#), [Education in Ireland](#), [Study in Italy](#), [Find a Masters](#), [Study in Netherlands](#), [Maastricht University](#), [Times Higher Education](#), [Save the Student](#), [Finder](#)

The cost of living in the UK is significantly higher than in Canada, Germany, Italy and the Netherlands, largely due to housing costs; although students who work are likely to earn more



Average monthly student cost of living by country

	Total	Housing	Groceries	Travel	Hourly minimum wage
 United Kingdom	£800-1300	£380-800	£100-150	£30-60	£10.42
 Canada	£495-1160	£350-960	£123-186	£31-77	£9.57
 Germany	£602-860	£215-600	£132-146	£100	£10.30
 Ireland	£716-1150	£258-860	£160-301	£40-73	£9.02
 Italy	£602-860	£258-516	£155-189	£26	N/A
 Netherlands	£688-1030	£300-688	£129-146	£73	£8.75
 United States	£826-1240	£413-826	£154-262	£59	£5.97

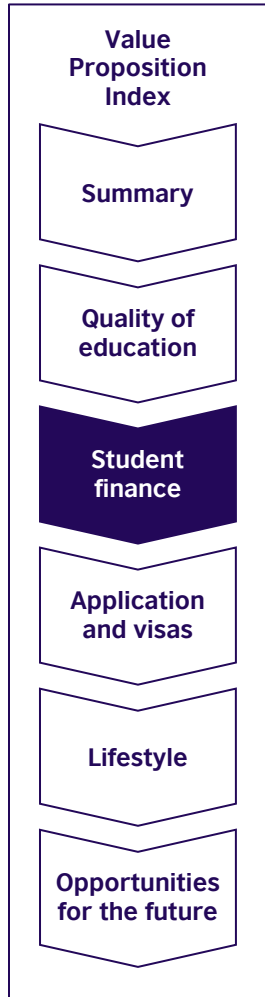
Key takeaways








1. The average **overall cost of living for students is highest in the UK, Ireland and the USA**, and the lowest in Germany and Italy
2. Average student housing costs are also cheapest in Germany and Italy and highest in the UK and the USA
3. Housing costs in Ireland vary dramatically depending on location, with Dublin being particularly expensive
4. Groceries and travel are relatively cheap in the UK
5. The **UK and Germany provide a high minimum wage for students** who work. The minimum wage in the USA is very low whilst Italy has no minimum wage at all

Notes: These values have been triangulated from a selection of ranges of average costs provided in student-facing sources. The ranges therefore do not necessarily capture the absolute maximum and minimum values for spending in these categories, but provide an approximation of the range of 'normal spending'. All currencies converted to GBP on 23 Nov 2022.

Sources: UK: [British Council: Study UK](#), [Studyportals: Masters portal](#), [Save the Student](#), [Pearson](#); Canada: [Prospects](#), [Studyportals: Masters portal](#), [AECC Global](#), [Pearson](#); Germany: [DAAD](#), [Top Universities](#), [Studyportals: Masters portal](#), [Expatrio](#); Ireland: [Education in Ireland](#), [Studyportals: Masters portal](#), [Technological University Dublin](#), [University College Cork](#), [University of Galway](#); Italy: [Study in Italy](#), [Studyportals: Masters portal](#); Netherlands: [Study in Netherlands](#), [Studyportals: Masters portal](#), [Study.EU](#); USA: [AECC Global](#), [Go Study](#) [Studyportals: Masters portal](#); Minimum wage: [World Population Review](#)

Ireland, Italy and the Netherlands offer unrestricted employment to EU students, while UK, Canada and Germany allow any job but limit hours; the USA is much more restrictive

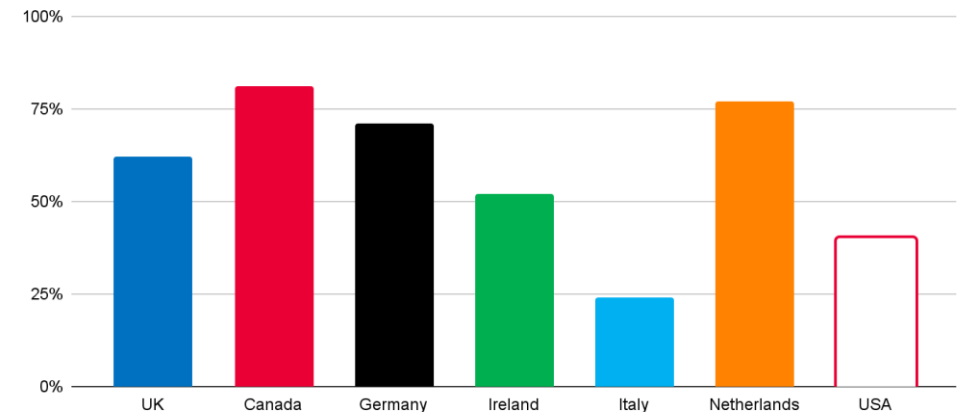


		Restrictions on work role	Restrictions on hours
	United Kingdom	Some roles not allowed ¹	20hrs per week in term, no limit out of term
	Canada	None	No limit on-campus ² . 20hrs per week off-campus in term, no limit out of term
	Germany	None	20hrs per week in term, no limit out of term
	Ireland	None	None
	Italy	None	None
	Netherlands	None	None
	United States	Only on-campus except in extenuating circumstances ³	20hrs per week in term, no limit out of term

Key takeaways

1. The **USA is significantly less open to student working** than other competitors, only allowing limited on-campus work
2. UK, Canada, Germany allow all or most types of work, but **only for 20 hours per week** in term time
3. Ireland, Italy and the Netherlands place no restrictions on students working
4. Significantly **fewer students have jobs in Italy and the USA** than elsewhere, with the most students working in Canada

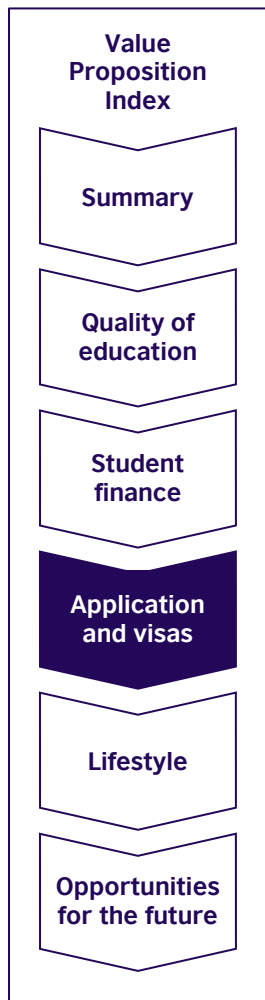
% of students working while studying










Notes: ¹ You cannot be self-employed, nor work as a professional sports person or entertainer while on a student visa. ² On-campus jobs refer to employment on the university site, typically for businesses associated with the university, e.g. working in the library or campus cafe. ³ Not in your first year of study, and experiencing unexpected financial hardship.

Sources: Eurostudent, SaveTheStudent, Statistics Canada, National Centre for Education Statistics, UKCISA, Government of Canada, US Department of State, Your Europe, Deutsche Rentenversicherung, Netherlands Labour Authority, Irish Council for International Students, Università Cusano a Foggia

For undergraduates, UK HEIs offer a highly centralised application process and application fees are low, although some HEIs have stringent English requirements



	Centralisation	Minimum IELTS requirement ¹	Average application fees ²	Common deadline ⁵
 United Kingdom	All apps. through central portal	6.0 - 7.5	£27	January
 Canada	All apps. direct to HEIs	6.5	£248-£620 ³	January - March
 Germany	Most apps through central portal	4.5 - 6.5	£143	January
 Ireland	All apps. through central portal	6.0 - 6.5	£39	February
 Italy	Most apps. direct to HEIs	4.0 - 6.5	£0	January - July
 Netherlands	Most apps through central portal	6.5	£86-£344 ⁴	May
 United States	Most apps. direct to HEIs	5.5 - 8.0	£144-£288 ³	October - March

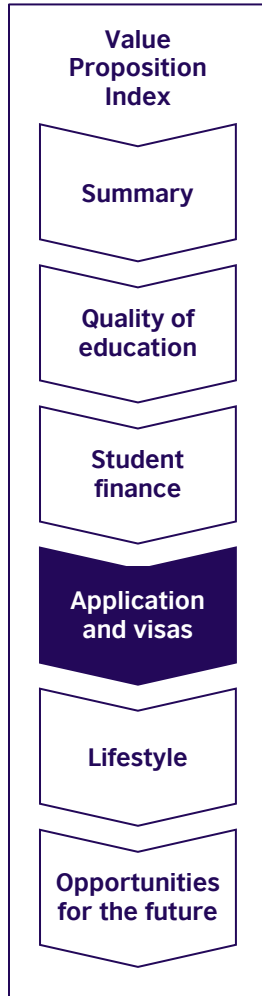
- ### Key takeaways
1. Compared to the USA, Canada and Italy, the UK application process is **highly centralised** through UCAS, making it faster for students
 2. The UCAS **application fee is much cheaper** than equivalents in Canada, Netherlands, USA and Germany
 3. The most prestigious UK and USA universities have **high standards for English language**, although most institutions across all countries have similar requirements
 4. UK **deadlines are earlier** than in Italy or the Netherlands, meaning it may miss applications from some students who decide to study abroad late

Find more details on the HEI application process across all included countries in Appendix B3

Notes: ¹ These figures relate to the minimum IELTS scores international students must achieve to be accepted by HEIs in each country. The ranges reflect how some HEIs have higher English language requirements than others. HEIs in all countries accept IELTS as proof of English language proficiency; ² Assuming application to four courses. All currencies converted to GBP on 23 Nov 2022; ³ Prices vary depending on choice of course and institution; ⁴ Prices vary depending on whether applications are for several institutions, or 4 courses at one institution; ⁵ Assuming an autumn start date

Sources: [UCAS](#), [The Complete University Guide](#), [UK Uni](#), [Study International](#), [Prospects](#), [DAAD](#), [Top Universities](#), [Studyportals: Masters portal](#), [Education in Ireland](#), [Central Applications Office](#), [Study in Italy](#), [Uni-Italia](#), [Study in Holland](#), [Jeduka](#), [Save the Student](#), [Global Scholarships](#)

For postgraduates, the UK loses its advantage in having a centralised and low-cost application process, although extended deadlines provide more opportunities for students to apply



There are several key **distinctions between undergraduate and postgraduate application processes** across the 7 countries

1 Whilst the UK and Ireland use a central admissions portal for undergraduate students, they **require application directly to institutions for postgraduate study** as in Canada, Italy and the USA for all study. As with undergraduate study, in Germany and the Netherlands, postgraduate applications can be made both through a central portal and directly to the institution

2 For most HEIs, there is **no distinction between the minimum IELTS scores international students must achieve to be accepted for undergraduate versus postgraduate study**, although a few institutions across all competitor countries have higher IELTS requirements for postgraduate studies

3 Application **fees in the UK can be much higher for postgraduate study** (£25 - £150 per course) than undergraduate study (maximum £27 across all courses). Whilst fees are also slightly higher for postgraduate students in Ireland (£43 per application), no other countries has such a significant distinction between undergraduate and postgraduate application fees

4 Whilst deadlines for undergraduate and postgraduate applications tend to be similar in Canada, Italy, Netherlands, and the USA, **deadlines for postgraduate study often extend much later into the summer in the UK**, Germany and Ireland. This brings them in line with the deadlines for undergraduate and postgraduate study in Italy








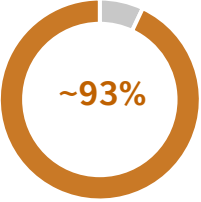



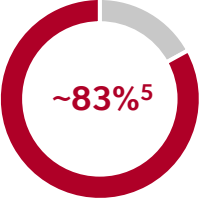
Find more details on the HEI application process across all included countries in Appendix B3

EU students do not require a visa to study elsewhere in the EU; however, compared to non-EU competitors, the UK visa application process is quick and simple but expensive

Value Proposition Index

- Summary
- Quality of education
- Student finance
- Application and visas**
- Lifestyle
- Opportunities for the future

EU students do not need a visa to study in the EU. However, they do need a visa to study in the UK, Canada and USA.

	Complexity	Price ¹	Stated timeliness ²	Success rate ³
United Kingdom 	Interview not usually required 2-4 documents required	 £363 ⁴ Excluding reimbursable health surcharge of £470 per year	~3 weeks 	 ~98%
Canada 	Interview not usually required 4-6 documents required	 £94	~12 weeks 	 ~93%
United States 	Interview usually required 4-7 documents required	 £425	~2-11 weeks 	 ~83% ⁵

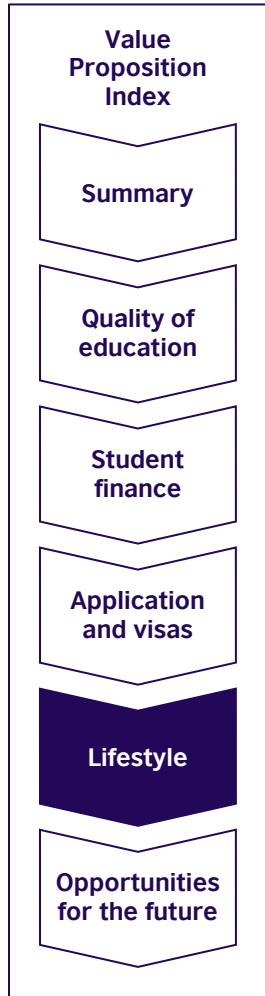
- ### Key takeaways
1. The **UK and Canada visa systems are simpler than the USA's**, largely because they do not usually require a visa interview
 2. Canada's visa is the cheapest, although the **UK's visa is still less expensive than the USA's** visa
 3. The **UK's stated timelines for processing visas are much shorter than Canada's or the USA's**, although this may not accurately reflect actual waiting times on the ground
 4. Student **visa applications are most likely to be successful in the UK**, and the least likely to be successful in the USA

Find more details on the visa application process in the UK, Canada and USA in Appendix B4

Notes: ¹ All prices converted to £GBP on 18/11/22 using Google Student finance; ² These timelines are the stated timelines by which government websites say visa applicants can expect to have their visa application processed. However, they may not accurately reflect actual waiting times on the ground; ³ This is the success rate of student visas for applicants from EU countries in 2021, although see caveat on US figure in note 5; ⁴ This figure does not include a £470 per year health surcharge to pay for state-provided healthcare when in the UK; ⁵ The US State Department does not publish student visa refusal rates by country. Therefore, this figure is inferred from applying differential success rates in attaining non-student visas in different countries to the overall success rate for student visa applications worldwide.

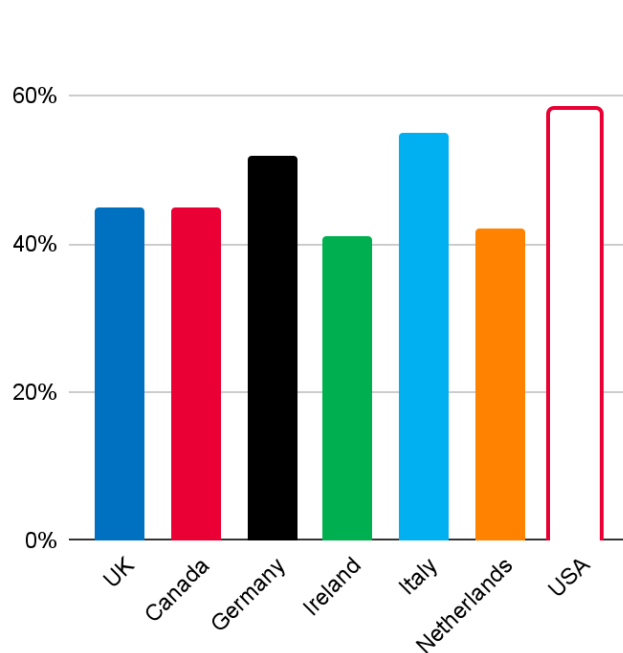
Sources: Complexity, price and timeliness: [UK Government](#), [Government of Canada](#), [US Department of State](#); Success rate: UK Government; [Government of Canada](#); [US Department of State](#)

UK residents are middling in terms of their satisfaction with the availability of quality affordable housing, but a much larger percentage of students are in designated accommodation in the UK

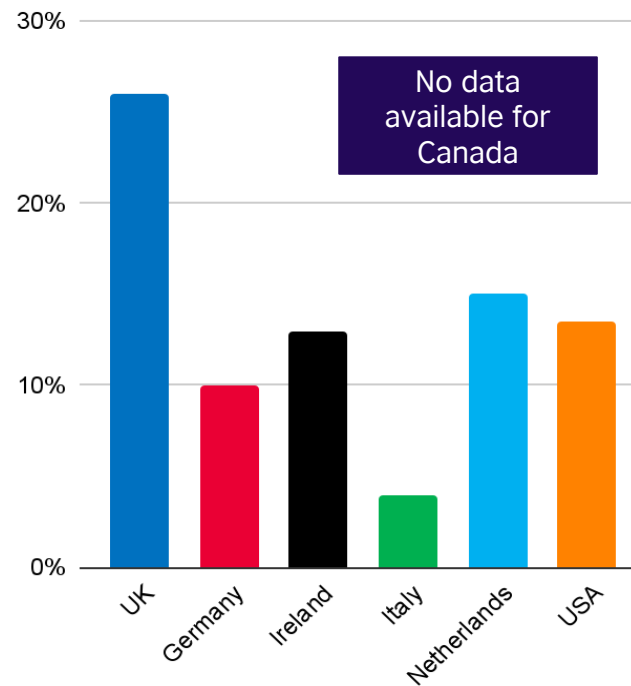


International Student Survey data shows finding appropriate accommodation is one of the top three concerns for 46% of prospective international students from Europe¹. This is the second most common concern following tuition fees and living expenses.

% who are satisfied with the availability of quality affordable housing²



% of students in designated student accommodation³

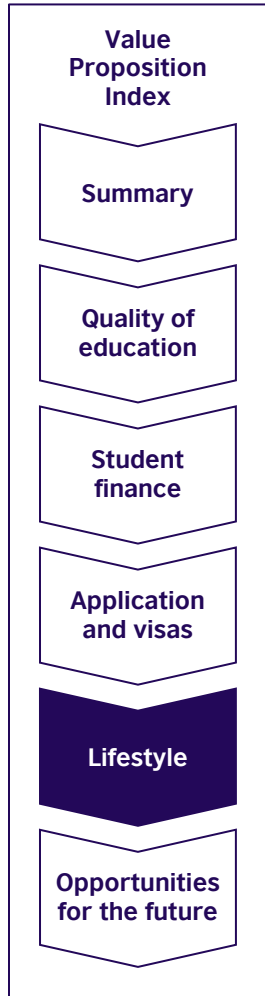


Key takeaways

1. **UK residents are less satisfied with the availability of quality affordable housing** than in Germany, Italy or the USA, but more satisfied than residents in Ireland or the Netherlands, where anecdotal evidence confirms that housing availability is an acute issue
2. The **provision of designated student accommodation is much greater in the UK** than in all competitor countries, suggesting it is easier for new students to find accommodation
3. There is an especially small stock of designated student accommodation in Italy

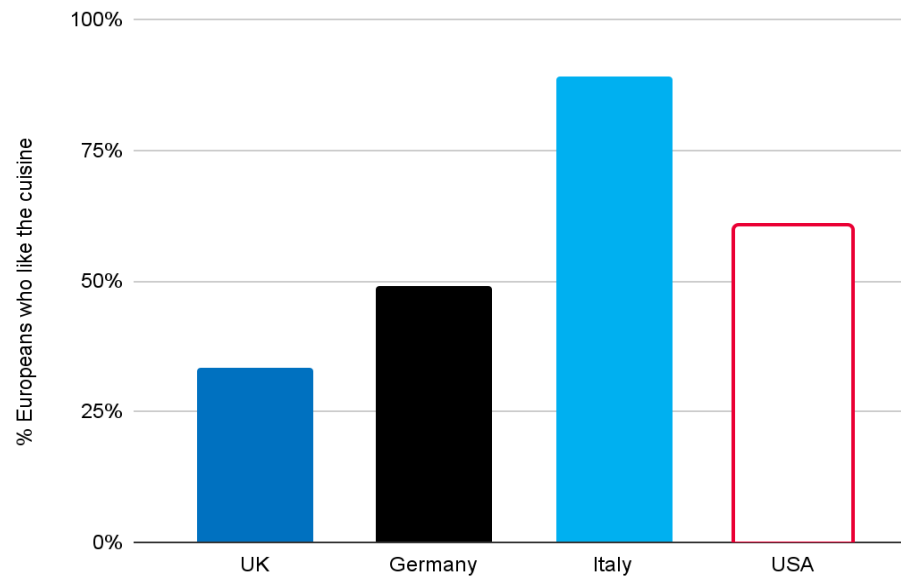
Sources: ¹ [Educations.com International Student Survey Insights 2021-2022](#), based on over 10,000 responses from students across 181 countries who are currently thinking about studying overseas; ² Data collated by the [OECD](#) but sourced from the 2020/21 Gallup World Poll. The Gallup World Poll uses a standardised set of survey questions with 1000+ respondents in almost every country in the world; ³ [CBRE Investment Management](#)

Globally, the UK is perceived to have both unappealing cuisine and bad weather, whilst Italy is considered the most appealing destination on these two measures

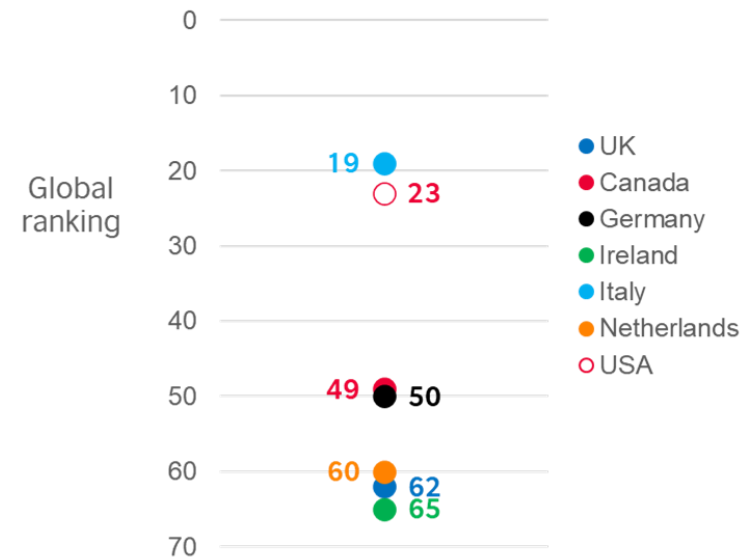


Anecdotal evidence from the British Council EU Higher Education team has highlighted that some prospective students, especially in Southern Europe, do not find the lifestyle in the UK attractive due to perceptions of an unappealing cuisine and bad weather¹

% of Europeans who like the cuisine in each country²



Global ranking for satisfaction with the weather³

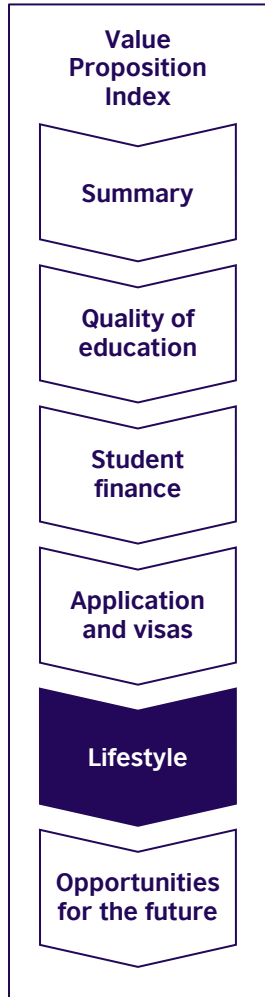


Key takeaways

- Italian food is the most popular** amongst residents of 8 European nations, whilst **British food is the least popular**. British food is particularly unpopular in countries with the most outbound international students (i.e. Germany, France, Italy, Spain)
- Satisfaction with the weather is highest in Italy** and the USA, but lowest in the Netherlands, the UK and Ireland

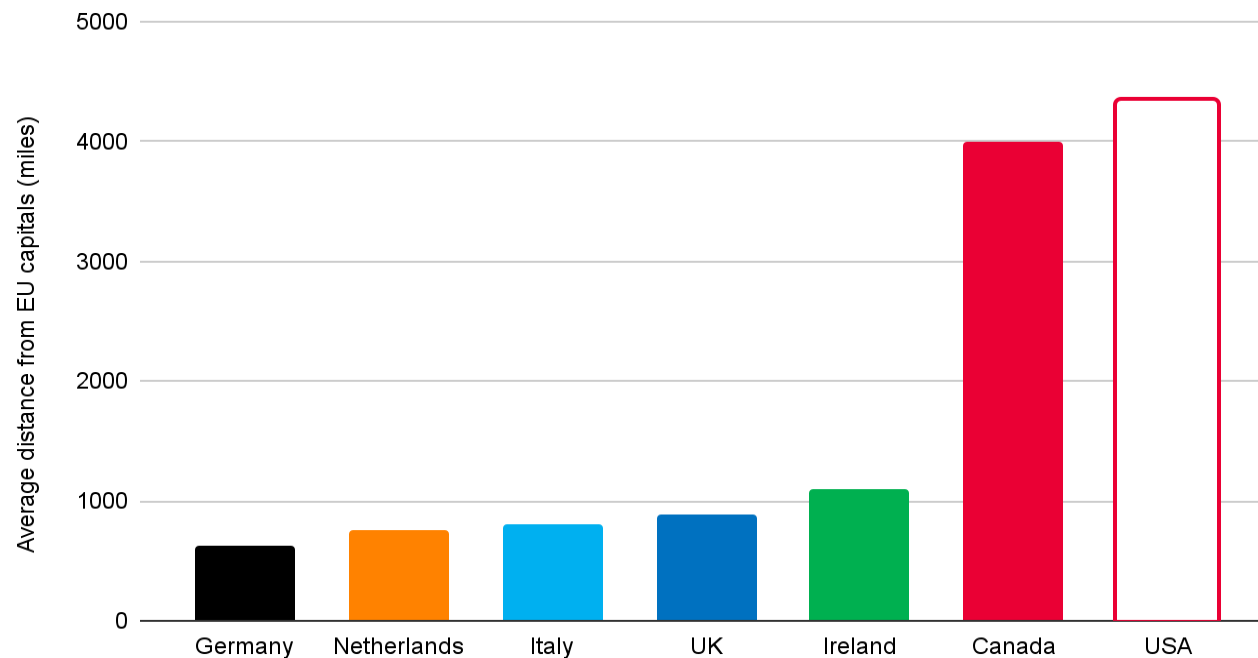
Sources: ¹ Insights from a workshop with the British Council EU Higher Education team on 9th December 2022; ² YouGov 2019 poll of more than 25,000 people in 24 countries, with responses from European countries only included (Finland, France, Norway, Sweden, Germany, Denmark, Spain, Italy). No data available on Canadian, Irish or Dutch cuisine; ³ [InterNations Expat Insider Survey](#), based on the insights of close to 13,000 expats living in 188 countries in 2017.

Canada and the USA are disadvantaged by their distance from the homes of EU students; meanwhile, Germany is the most accessible location for students across the EU



International students often invite friends and family to visit them in their destination country, with London Economics estimating the average international student in the UK attracts 1.6 international visitors each year, with this figure rising to 2.7 for students from the EU¹. Studying close to home therefore has benefits in making these trips easier and cheaper for students' visitors. It also makes it easier and cheaper for students to travel home during holiday periods. The British Council's 2022 survey of prospective EU students found proximity to Europe was one of the key reasons the UK was a first-choice destination for many students.²

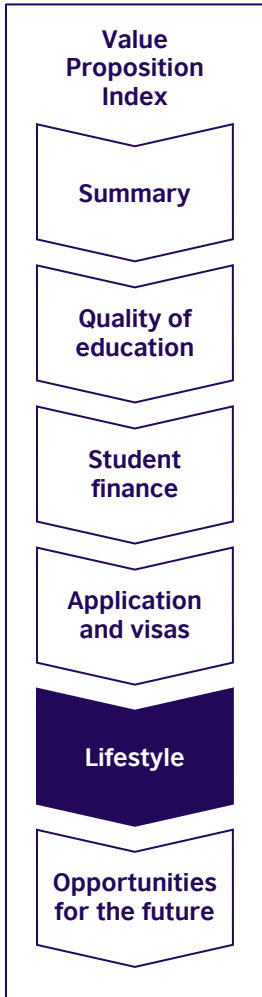
Average distance from country capital city to EU capital cities³



- ### Key takeaways
1. As **Canada and the USA are much further away** from EU capital cities than their European competitors, students are less able to easily and cheaply visit home or have friends and family visit them
 2. Within Europe, Germany's capital city Berlin is on average the closest to the other capital cities across Europe, whilst Ireland's capital Dublin is the furthest away. In practice this will vary depending on source country.

Sources: ¹ [London Economics](#), 2021; ² Research carried out by Kubi Kalloo on behalf of the British Council in April 2022, with a total sample of 1,764 prospective students; ³ The PSC analysis

Having English as a first language is advantageous for study abroad destinations; of non-English speaking countries, the population of the Netherlands is the most proficient in English



English-speaking countries have a significant advantage when it comes to attracting international students from the EU for two key reasons:


1. Helping students get by in daily life

International Student Survey¹ data shows that not speaking the local language is one of the top 3 concerns for 23% of prospective international students from Europe. This advantages English-speaking countries as 32% of EU citizens say they speak English as a second language well enough to have a conversation in comparison to just 5% for both German and French.²

2. Supporting students' personal development

67% of people across the EU think English is one of the two most useful languages to learn for their personal development.²

The British Council's 2022 survey of prospective EU students corroborate this, finding that a key selling point for the UK was having English as its first language, making it easier to communicate in daily life and a good destination to learn English.³

English proficiency of general population (global rank) ⁴	
 Germany	10
 Italy	32
 Netherlands	1








Key takeaways

1. The **UK, Canada, Ireland and the USA** have an **advantage as English-speaking countries**, as this is perceived as helping international students get by in daily life and enhancing their personal development
2. Amongst non-English speaking countries, **the Netherlands has the most proficient population in English**, whilst Italians are the least proficient in English

Graduates in the UK have middling career prospects in terms of employment and earnings; employment is highest in the Netherlands and Germany, whilst earnings are highest in the USA

Value Proposition Index

- Summary
- Quality of education
- Student finance
- Application and visas
- Lifestyle
- Opportunities for the future

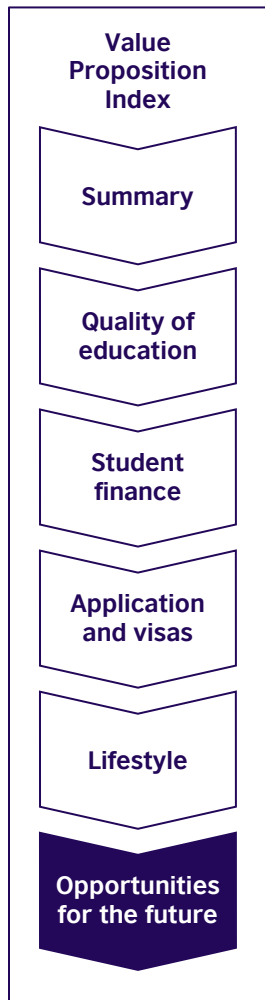
		Employment prospects		Earning potential	
		Employment rate (all) ¹	Graduate employment rate ²	Average income (all) ³	Average graduate income ⁴
	United Kingdom	75%	86%	£41,483	£62,639
	Canada	73%	82%	£46,485	£66,474
	Germany	76%	88%	£46,513	£76,747
	Ireland	70%	86%	£42,367	£75,414
	Italy	58%	82%	£33,837	£46,715
	Netherlands	80%	89%	£50,566	£78,377
	United States	71%	81%	£62,033	£112,279





- ### Key takeaways
1. Employment rates for graduates are highest in the Netherlands and Germany, and lowest in the USA; however only 8 p.p. separate all seven countries
 2. The average graduate income in the USA is substantially higher than in any other country, and 80% higher than in the UK
 3. Whilst the average graduate income is lowest in Italy, the UK also trails behind most other countries on average graduate income, with graduates earning over £10k less than in the Netherlands, Germany and Ireland

Notes: All figures adjusted from USD to GBP using exchange rates from Google Student finance on 23/11/2022.

Sources: ¹ OECD Employment Rate, 2021; ² OECD Employment rate by education level, 2021; ³ OECD Average wages, 2021; ⁴ Average graduate income calculated using OECD Relative Earnings for tertiary educated 25-64yr workers, 2021, and OECD Average wages, 2021.

EU students have full rights to work in EU countries following graduation; the UK, USA, and Canada each offer temporary working visas which allow graduates to stay for a limited period



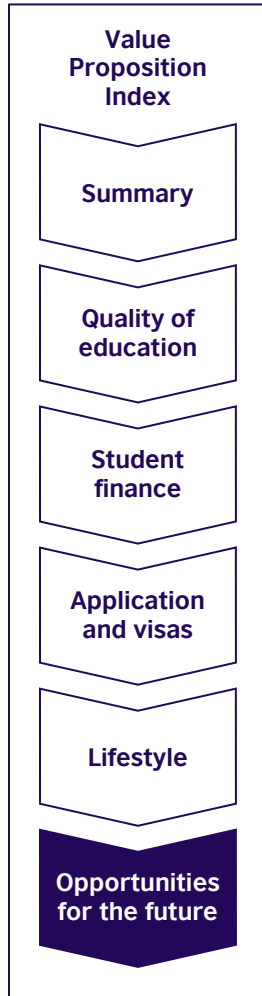
Find more details on working visas in Appendix B5		Summary of right to work	% students staying after graduating ¹	Skilled visas granted ²
	United Kingdom	<ul style="list-style-type: none"> Graduate Route gives temporary right to work for 2 yrs Broadly free to do all types of work Then need a permanent visa, typically the Skilled Worker visa (requires sponsorship) 	20%	182,000 (year ending Q1 2022)
	Canada	<ul style="list-style-type: none"> Post Graduation Work Permit gives temporary right to work for 3 yrs Broadly free to do all types of work Then need a permanent visa, typically through the points-based Express Entry visa system (does not require sponsorship). 	58%	137,000 (year ending Q3 2022)
	United States	<ul style="list-style-type: none"> Optional Practical Training gives temporary right to work for 1 year with 2 year extension for STEM graduates Employment must be related to studies Then need a permanent visa, typically a H1-B visa (requires sponsorship) and has a strict annual quota. 	71%	85,000
	EU countries	EU/EEA citizens have full rights to stay permanently, given by EU freedom of movement. Figures are not published on number of EU international students who remain in other EU countries following completion of their studies.		

Key takeaways

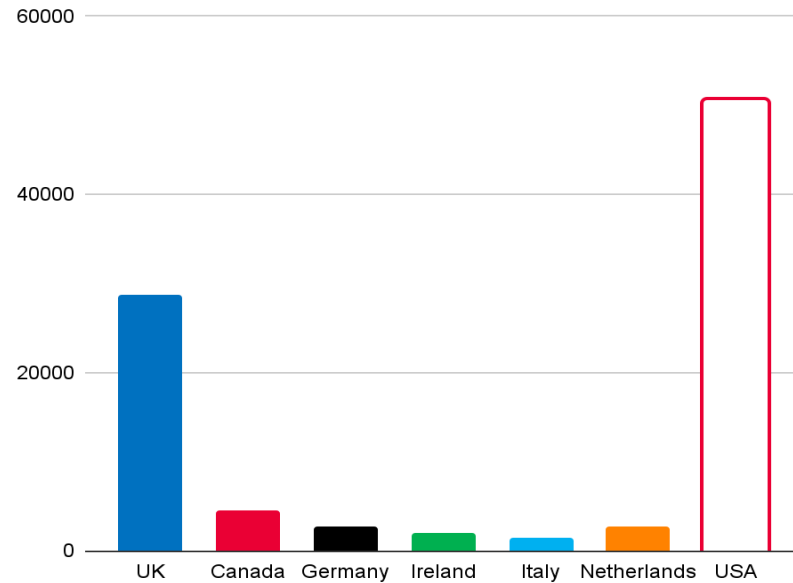
- EU students have the right to work permanently in other EU countries.** However, students may struggle to gain employment if they do not speak the official language of a country (e.g. Dutch in the Netherlands).
- UK, Canada, and USA each offer temporary working visas** to EU graduates, after which they will need to gain permanent, skilled visas to remain working.
- The UK's temporary visa has lower take-up, but was only introduced in July 2021, so take-up is likely to increase.
- The **UK grants the most skilled visas annually**, which may suggest an easier route for EU students

Notes: ¹ Estimated based on the most recent number of relevant temporary visas granted as a % of the size of the most recent enrolling class of international students as a proxy for size of graduating class. Note that the Graduate Route has recently been implemented, so take-up may increase in future. **Sources:** [Gov.uk](#), [Gov.uk](#), [HESA](#), [Universities UK](#), [European Commission](#), [Government of Canada Immigration Advice](#) and [Open Data, ApplyBoard](#), [United States Citizenship and Immigration Services](#), [Yale Office of International Students](#), [OpenDoors](#)

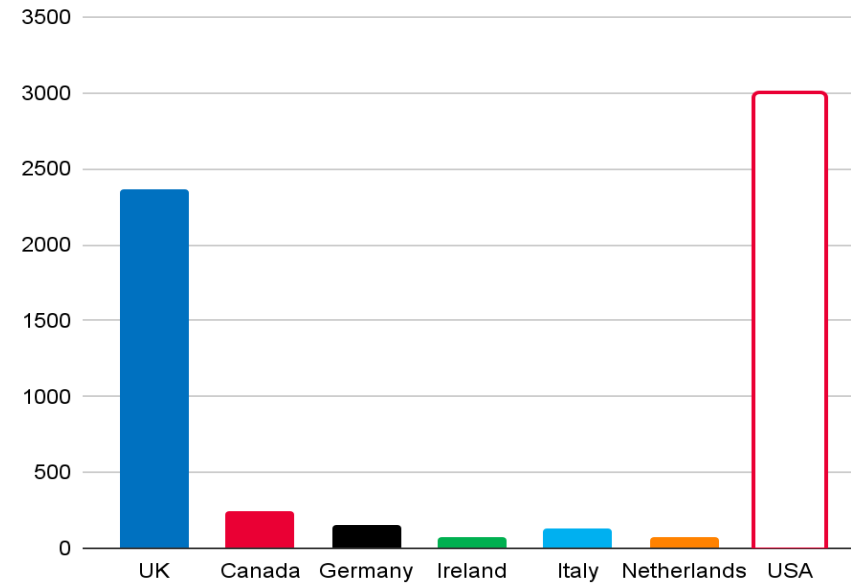
For prospective graduate students considering the future, the USA and UK offer many more opportunities to pursue further study in English than any competitors



Masters courses taught in English available on Studyportals by country in November 2022



PhD opportunities in English available on Studyportals by country in November 2022



Key takeaways

1. The **USA and UK offer by far the most opportunities to pursue further study** in English
2. Compared to Canada, the country with the third most opportunities for further study, the USA and UK offer 11x and 6x more Masters opportunities respectively
3. Similarly, compared to Canada, the USA and UK offer 12x and 9x more PhD opportunities in English

Notes: Studyportals data does not necessarily cover all available HE courses, but provides a clear indication of the variation in provision of courses taught in English between countries. Previous British Council research has concluded that the majority of HEIs offering EME courses advertise on Studyportals.









Sources: [Studyportals: Masters portal](#), [Studyportals: PhD portal](#)

5. Learning from competitor National Education Agencies












This research has focused on the activities and messaging of 9 National Education Agencies (NEAs) across the 7 competitor countries; the remit and goals of each of the NEAs differs slightly

Key takeaways: While most NEAs are specifically focused on attracting international students to the country in question, the British Council, DAAD and Nuffic have a wider remit. Meanwhile, Study in the USA is the only private company included.

			
<p>The British Council promotes cultural relationships between the UK and other countries, including through education, promoting the English language, arts and culture. Study UK is the only national level campaign that promotes the UK as a first-class study destination all over the world. The campaign is delivered by the British Council, in partnership with the UK government's GREAT Britain campaign, which encourages people to visit, invest and study in the UK.</p>	<p>Specifically focused on attracting international students to Canada, largely through provision of online information.</p>	<p>Supports the internationalisation of German HE through supporting inbound and outbound student mobility and building academic networks. Runs the Study in Germany campaign.</p>	<p>Specifically focused on attracting international students to Ireland, largely through provision of online information and outreach events.</p>
			
<p>Focused on attracting international students to Italy through proactive outreach campaigns. Also encourages academic cooperation between Italy and other foreign countries.</p>	<p>A government website providing practical information about studying in Italy to prospective students. It does not engage in outreach to prospective students.</p>	<p>Promotes internationalising of HE, but increasing focus on supporting outbound Dutch students over attracting inbound students to the Netherlands. Runs the Study in NL campaign.</p>	<p>A private company which connects USA HEIs with prospective international students, and provides various student support services for a fee</p>

Most NEAs primarily target emerging economies, although Germany, France and Spain are the most targeted EU countries; STEM subjects, especially relating to technology, are most targeted

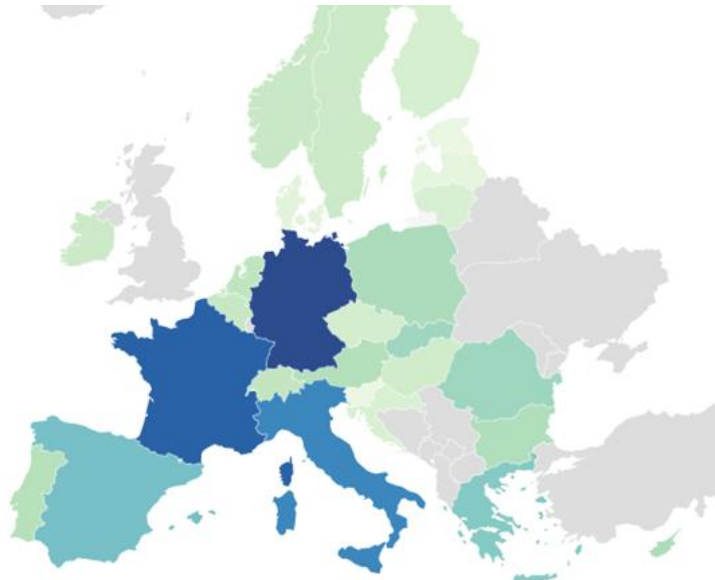
KEY: Stated target *Inferred target*

									
Priority countries /regions	Worldwide: China, India, Indonesia, Malaysia, Nigeria, Pakistan, USA Europe: France, Germany, Spain, Poland	Worldwide: Mexico, Brazil, Vietnam Europe: N/A	Worldwide: <i>Egypt, Syria, Turkey, Jordan, India</i> Europe: <i>Italy, Poland, France, Spain</i>	Worldwide: India, Brazil, Mexico, Spain, Vietnam, West Africa, East Africa Europe: Spain, Italy, France, Germany	Worldwide: China, India, Indonesia, Iran, Vietnam Europe: N/A	No clear target countries	Worldwide: India, Indonesia, Vietnam, South Korea Europe: N/A	Worldwide: <i>Brazil, Mexico, South Africa, Chile, Colombia</i> Europe: <i>Germany, Poland, Spain, Hungary, Ireland, Czechia</i>	Worldwide: <i>Latin America, Vietnam, China, Brazil, India</i> Europe: N/A
Target subjects	No clear target subjects	Artificial Intelligence, Quantum Technologies, Environment and Earth Sciences, Life Sciences	Messaging: <i>STEM subjects</i> Funding: <i>Language and cultural studies, Social Sciences</i>	<i>Business and Finance, Engineering, Digital Marketing</i>	No clear target subjects	No clear target subjects	No clear target subjects	<i>STEM subjects, especially Analytics and Data Science</i>	Business and Finance, Computer Science, other STEM, English as a Second Language
Target level of study	No clear target level of study	No clear target level of study	No clear target level of study	No clear target level of study	<i>PhD</i>	No clear target level of study	No clear target level of study	No clear target level of study	<i>Bachelors and Masters</i>

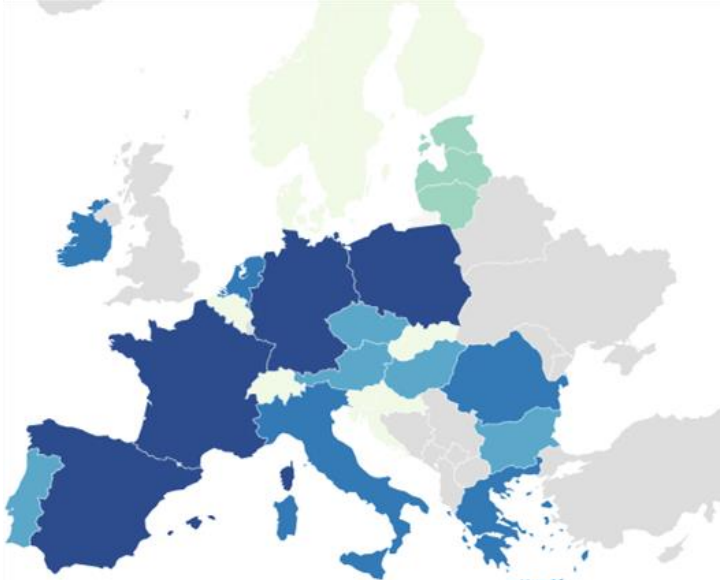
The British Council's priority countries have large numbers of outbound international students, but they are also being targeted by competitor NEAs

The British Council's 4 priority countries had 305,655 outbound international students in 2020 collectively¹. Italy, Greece, Romania, Slovakia, Cyprus and Bulgaria also all had large numbers of outbound international students in 2020, reaching 238,394 students collectively¹. Notably, Poland had fewer outbound international students than Italy, Greece, Romania or Slovakia². However, these nations, bar Italy, are not currently being targeted by any competitor NEAs.

Number of outbound international students by country in 2020¹

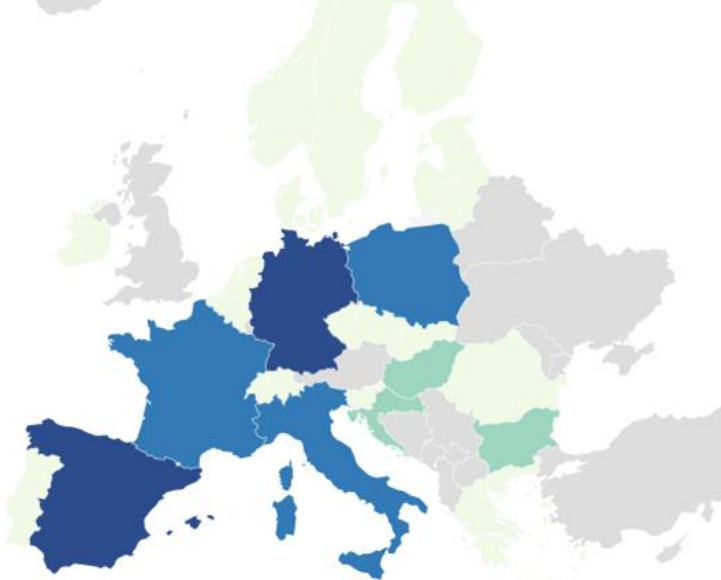


British Council presence in 'EU Europe'³



Dark Blue	Priority countries	Green	Significant contract activity
Medium Blue	In-country programme	Light Green	Remote model
Light Blue	Limited resource		

Target EU countries for competitor NEAs (excluding British Council)⁴



Dark Blue	Targeted by 3 NEAs	Green	Targeted by 1 NEA
Medium Blue	Targeted by 2 NEAs	Light Green	Targeted by 0 NEAs

Notes/Sources: ¹ [UNESCO Institute for Statistics](#), ² Although note that the vast majority of outbound Slovakian students study in Czechia and it therefore may not represent a key market for the UK, ³ Information provided by EU British Council team, ⁴ See previous slide.

Whilst the key messages on the British Council website relate to the quality of Higher Education in the UK, NEAs in Canada and Germany focus much more strongly on lifestyle

Key	Quality	Student finance	Application/visa	Lifestyle	Future opportunities						
<table border="1"> <thead> <tr> <th>British Council key messages</th> <th>EduCanada key messages</th> <th>DAAD key messages</th> </tr> </thead> <tbody> <tr> <td> <p>1 A British Education opens doors for your career through industry links, work placements and outstanding academic qualifications</p> <p>2 The UK is home to world-class universities, delivering some of the best teaching in the world</p> <p>3 UK teaching is innovative, allowing you to explore fresh ideas and think differently</p> <p>4 The UK is at the forefront of world-leading science and research, giving students unique insights and experience</p> <p>5 Courses in the UK are short and flexible having the option for optional modules, further specialisation</p> </td> <td> <p>1 Canada has a high quality of life with spectacular natural beauty and fantastic arts and culture</p> <p>2 Studying in Canada is affordable relative to key competitors, with lots of scholarships available</p> <p>3 Canadian HEIs offer high quality education, as outlined by university rankings</p> <p>4 Canadian HE emphasises career-focused learning and making industry connections, helping students realise their career dreams</p> <p>5 Canada is a diverse, inclusive and multicultural country, where international students are welcome</p> <p>6 Canada is a safe country</p> </td> <td> <p>1 German HEIs provide a first-class education, taking a practical approach which will help your career</p> <p>2 HE in Germany is highly affordable, with no tuition fees</p> <p>3 Germany is a safe and secure country</p> <p>4 Germany is an open and diverse society, where everyone is welcome</p> <p>5 German HEIs provide flexibility for students to pursue their specific interests and obtain relevant work experience</p> </td> </tr> </tbody> </table>						British Council key messages	EduCanada key messages	DAAD key messages	<p>1 A British Education opens doors for your career through industry links, work placements and outstanding academic qualifications</p> <p>2 The UK is home to world-class universities, delivering some of the best teaching in the world</p> <p>3 UK teaching is innovative, allowing you to explore fresh ideas and think differently</p> <p>4 The UK is at the forefront of world-leading science and research, giving students unique insights and experience</p> <p>5 Courses in the UK are short and flexible having the option for optional modules, further specialisation</p>	<p>1 Canada has a high quality of life with spectacular natural beauty and fantastic arts and culture</p> <p>2 Studying in Canada is affordable relative to key competitors, with lots of scholarships available</p> <p>3 Canadian HEIs offer high quality education, as outlined by university rankings</p> <p>4 Canadian HE emphasises career-focused learning and making industry connections, helping students realise their career dreams</p> <p>5 Canada is a diverse, inclusive and multicultural country, where international students are welcome</p> <p>6 Canada is a safe country</p>	<p>1 German HEIs provide a first-class education, taking a practical approach which will help your career</p> <p>2 HE in Germany is highly affordable, with no tuition fees</p> <p>3 Germany is a safe and secure country</p> <p>4 Germany is an open and diverse society, where everyone is welcome</p> <p>5 German HEIs provide flexibility for students to pursue their specific interests and obtain relevant work experience</p>
British Council key messages	EduCanada key messages	DAAD key messages									
<p>1 A British Education opens doors for your career through industry links, work placements and outstanding academic qualifications</p> <p>2 The UK is home to world-class universities, delivering some of the best teaching in the world</p> <p>3 UK teaching is innovative, allowing you to explore fresh ideas and think differently</p> <p>4 The UK is at the forefront of world-leading science and research, giving students unique insights and experience</p> <p>5 Courses in the UK are short and flexible having the option for optional modules, further specialisation</p>	<p>1 Canada has a high quality of life with spectacular natural beauty and fantastic arts and culture</p> <p>2 Studying in Canada is affordable relative to key competitors, with lots of scholarships available</p> <p>3 Canadian HEIs offer high quality education, as outlined by university rankings</p> <p>4 Canadian HE emphasises career-focused learning and making industry connections, helping students realise their career dreams</p> <p>5 Canada is a diverse, inclusive and multicultural country, where international students are welcome</p> <p>6 Canada is a safe country</p>	<p>1 German HEIs provide a first-class education, taking a practical approach which will help your career</p> <p>2 HE in Germany is highly affordable, with no tuition fees</p> <p>3 Germany is a safe and secure country</p> <p>4 Germany is an open and diverse society, where everyone is welcome</p> <p>5 German HEIs provide flexibility for students to pursue their specific interests and obtain relevant work experience</p>									

Like EduCanada and DAAD, Education in Ireland similarly focuses on lifestyle; meanwhile the Italian NEAs are similar to the British Council in focusing on quality

Key	Quality	Student finance	Application/visa	Lifestyle	Future opportunities
Education in Ireland key messages <ol style="list-style-type: none"> 1 Ireland is a friendly, welcoming and safe country for all visitors 2 As the only native English-speaking country in the EU, Ireland offers lots of opportunities to both study in and learn English 3 With many large corporations based in Ireland, and specialisms in financial services, IT, research and development, and pharmaceuticals, Ireland has fantastic career opportunities for highly-skilled graduates 4 Higher Education Institutions are high-quality and offer a wide range of subject options 5 Ireland is a fun and exciting place to live 		Uni-Italia key messages <ol style="list-style-type: none"> 1 Students can achieve a highly-respected degree in highly-ranked Italian universities and academies 2 Highly professional academic staff provide excellent support to students throughout their studies 3 Italy is on the cutting edge of several technological fields, offering great career prospects for graduates 4 The credits system of HE programmes gives students flexibility to pursue their interests 5 Several HEIs offer scholarships to support students financially 6 Italy has a high quality of life, with a rich history of culture, art, cuisine and sports 		Study in Italy key messages <ol style="list-style-type: none"> 1 All Italian HEIs provide high-quality education and research 2 Italian HEIs support students in the development of complex problem-solving and critical thinking skills 3 Italian HEIs offer a wide range of courses in English 4 Italy is renowned for its specialisms in Architecture, Arts, Design and Fashion 5 However, Italy is also strong on STEM subjects, including Biology, Natural Sciences, Physics, Pharmacy, Medicine, Mathematics and Computer Science 6 Due to publicly-financed universities, HE in Italy is affordable 	

Key messages for Nuffic and USA NEAs span quality, finance, lifestyle and opportunities for the future; the diversity of courses is a particularly strong message in the USA










Key	Quality	Student finance	Application/visa	Lifestyle	Future opportunities
-----	---------	-----------------	------------------	-----------	----------------------

Nuffic key messages	
1	There are wide range of English programmes available and high English proficiency in the general population
2	Dutch HEIs offer good value for money , with lower tuition fees and cost of living than competitors and lots of scholarships
3	The Netherlands is diverse and inclusive , with a big international community
4	The Netherlands has a great standard of living , with safe streets, happy people, a rich history and easy travel into Europe
5	As the home of many large multinational companies, the Netherlands offers excellent career opportunities

EducationUSA key messages	
1	Incredible diversity of courses and institutions allows you to specialise in any direction you choose
2	Students will receive high-quality teaching at all of these institution types
3	Education is practical-oriented and career-focused , allowing you to get hands-on experience of what you are learning
4	The USA is highly multicultural , and is home to people from all across the world
5	There are many opportunities for scholarships and other funding support

Study in the USA key messages	
1	There is a vast range of HEIs and programmes in the USA, providing students with flexibility and letting them choose the perfect course for their needs
2	Studying in the USA will allow you to make the most of your career and succeed, whether in the USA or your home country
3	Community colleges provide a very affordable option whilst still providing a high quality education
4	HEIs offer students excellent support throughout their degree programmes
5	The USA is a multicultural and inclusive country

Most NEAs offer similar services to prospective students prior to the application process, although the British Council does not offer formal in-country advisers like some other NEAs

	 BRITISH COUNCIL	 A world of possibilities Un monde de possibilités EduCanada	 DAAD	 EDUCATION IN IRELAND WORLD-CLASS STANDARDS WARMEST OF WELCOMES	 Uni-Italia	 SI STUDY in ITALY	 nuffic meet the world	 Education USA	 study in the USA
Course search tool	✓	✓	✓	✗	✗	✓	✓	✗	✓
Scholarship signposting	✓	✓	✓	✗	✓	✓	✓	✓	✓
Guidance on applying	✓	✗	✓	✓	✓	✓	✓	✓	✓
Student stories	✓	✓	✓	✓	✗	✓	✓	✓	✓
Virtual events	✓	✓	✓	✓	✓	✗	✓	✓	✓
In-person events	✓	✗	✓	✓	✓	✗	✓	✓	✗
In-country advisers ¹	-	✗	✓	✗	✗	✗	✗	✓	✓

Key takeaways

1. Online **guidance on applications and scholarships are the most widely provided services** to prospective students across all NEAs
2. The British Council/Study UK offers many of the same services to prospective students as other NEAs
3. Although in-country teams provide ad hoc advice and support to prospective students, **the British Council does not have formal and publicly-advertised in-country advisers** like DAAD, EducationUSA or Study in the USA
4. The **British Council/Study UK is the only NEA with an online engagement platform specifically targeting EU students**, although this is not well signposted online

See next slide for examples of more extensive and unusual support from NEAs to prospective students

Notes: ¹ In-country advisers refers to NEA staff based in the home country of prospective students who can provide in person and tailored advice on choosing a course, writing and application, obtaining a visa etc; Although the British Council in-country teams provide a lot of advice and support to prospective students over email and at student facing events, there is not a formal and publicly-advertised system for prospective students to seek advice from in-country teams.

Sources: Information gathered through systematic qualitative review of websites of all NEAs: [British Council](#), [EduCanada](#), [DAAD](#), [Education in Ireland](#), [Uni-Italia](#), [Study in Italy](#), [Nuffic](#), [EducationUSA](#), [Study in the USA](#).

North American NEAs also engage prospective students through virtual tours, summer programme, a matching service and live chat with students



A 'virtual tour' of Canada

- EduCanada provides [links to virtual campus tours](#) for the majority of HEIs across Canada, allowing students to explore potential HEIs from home
- As EduCanada emphasises the Canadian quality of life throughout their online content, they also provide links to live [nature and wildlife webcams](#), and a range of online [arts and culture resources](#)



Summer programmes for teenagers

- The [EducationUSA Academy](#) is a 3-4 week summer academic program which provides English language courses, tours of diverse colleges and universities, and cross-cultural activities for 15- to 17-year-old students
- This provides students with a taste of studying in the USA, and increases the likelihood that they apply for USA colleges and universities



A course 'matching service'

- Study in the USA makes it easy for students to find appropriate courses through its '[matching service](#)'
- Prospective students share information on their study level, course dates, subject, funding arrangement, preferred location, nationality and interests
- Student then receive a shortlist of suggested courses directly from advisors



Live chat with student ambassadors

- To help prospective students understand what it is like to study in the USA, Study in the USA provide the opportunity to [chat directly with international student ambassadors](#)
- Prospective students can chat to hundreds of different existing international students in the USA, and are able to search them by major, college and country of origin

Whilst all NEAs provide practical guidance to students following the application process, more extensive support includes pre-departure orientations and a telephone hotline

Following the application process, all NEAs provide a **range of practical guidance to support students** to settle in their new country.

This guidance tends to cover:

- Visa applications
- Accommodation
- Health insurance
- Banking
- Travel
- Registering with tax authorities
- Finding work

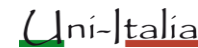
However, as outlined on the right, several NEAs provide **more extensive support** to students before or after their arrival.



EducationUSA advising centers organise **pre-departure orientations** for students getting ready to depart for the USA, drawing on the experiences of in-country USA alumni



Study in the USA provide **sessions with former USA visa officers** in order to prepare prospective students for the USA visa interview



Uni-Italia host **welcoming events for new international students**, providing useful information about the country, the city and HEI where they will be studying



Uni-Italia provide a **hotline service and mailing service** to support new international students with any problems that may arise on a daily basis



DAAD provides **additional grants for current international students** for further professional development (e.g. language courses) and individual virtual career coaching

The British Council/Study UK leads the way in engaging with education advisers, although differs from Canada in allowing advisers to self-certify following a training programme

The British Council offer

The British Council's offer to education agents includes:

- Provides a **course for education agents** to gain a training certificate with the British Council, and **publishes a list of self-certified education agents**
- Provides a **Study UK toolkit for advisers**, including all the information they need to support internationally mobile students and their families
- Provides **familiarisation trips** to the UK
- Currently **establishing a UK agent and counsellor training and engagement hub** to bring all these resources together on one platform for advisers, including Study UK toolkits, webinars, certified training and government updates

However, this support is not all well signposted online.

Other NEAs offer some similar services to education advisers, but none seem to provide as comprehensive a package of support as the British Council



Global Affairs Canada (which runs EduCanada) provides a **course to become an accredited advisor** on Canadian international education, and many Canadian HEIs require this qualification for advisers to work with students. Unlike the British Council's training, this is not self-certified and **requires advisers to pass an exam**



Education in Ireland explicitly advertise their **virtual and in-person education fairs for advisers** and prospective students, alongside offering **familiarisation trips** to Ireland for education advisors, visiting the campuses of 5 HEIs across the country



EducationUSA runs services specifically for advisers who work for their international advising centres. This includes **campus visits** to provide advisers with first-hand knowledge of USA colleges and universities, and facilitation of several **training institutes for education advisers** to learn more about studying in the USA

There is no public evidence of DAAD, Uni-Italia, Study in Italy, Nuffic or Study in the USA engaging with education advisers.

The British Council also provides some of the most extensive support to alumni; however, other NEAs do more to support HEIs to attract international students

Engagement with alumni



The British Council runs [Alumni UK](#), a global network for alumni of UK HEIs, providing easy ways to **connect with other alumni, careers advice and online training events**. Additionally, the British Council's annual [alumni awards](#) recognise and celebrate the success of UK alumni.



DAAD provides a similar online networking platform for alumni of German HEIs, but also offers a **service-oriented newsletter** for alumni, **free access to a range of specialist literature, grants for further professional development** and individual **virtual career coaching**.



Nuffic currently has a similar alumni network but it is soon closing down due to lack of funding.

There is no public evidence of NEAs in Canada, Ireland, Italy and the USA providing services to alumni.

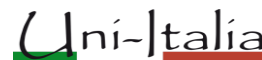
Support to HEIs



The British Council provides **a range of support to HEIs** for attracting international students. This includes sharing market intelligence and policy briefings, Study UK promotional toolkits, social media takeovers and collaboration on student-facing events.



DAAD facilitates **regular events and conferences** for German HEIs to discuss key trends in the internationalisation of HE (e.g. digitalisation). They also facilitate the development of partnerships between German HEIs and HEIs abroad, and their GATE-Germany programme provides HEIs with market insights and promotion materials for attracting international students.



Uni-Italia provides **a monthly newsletter to HEIs** on the current landscape of international student mobility.



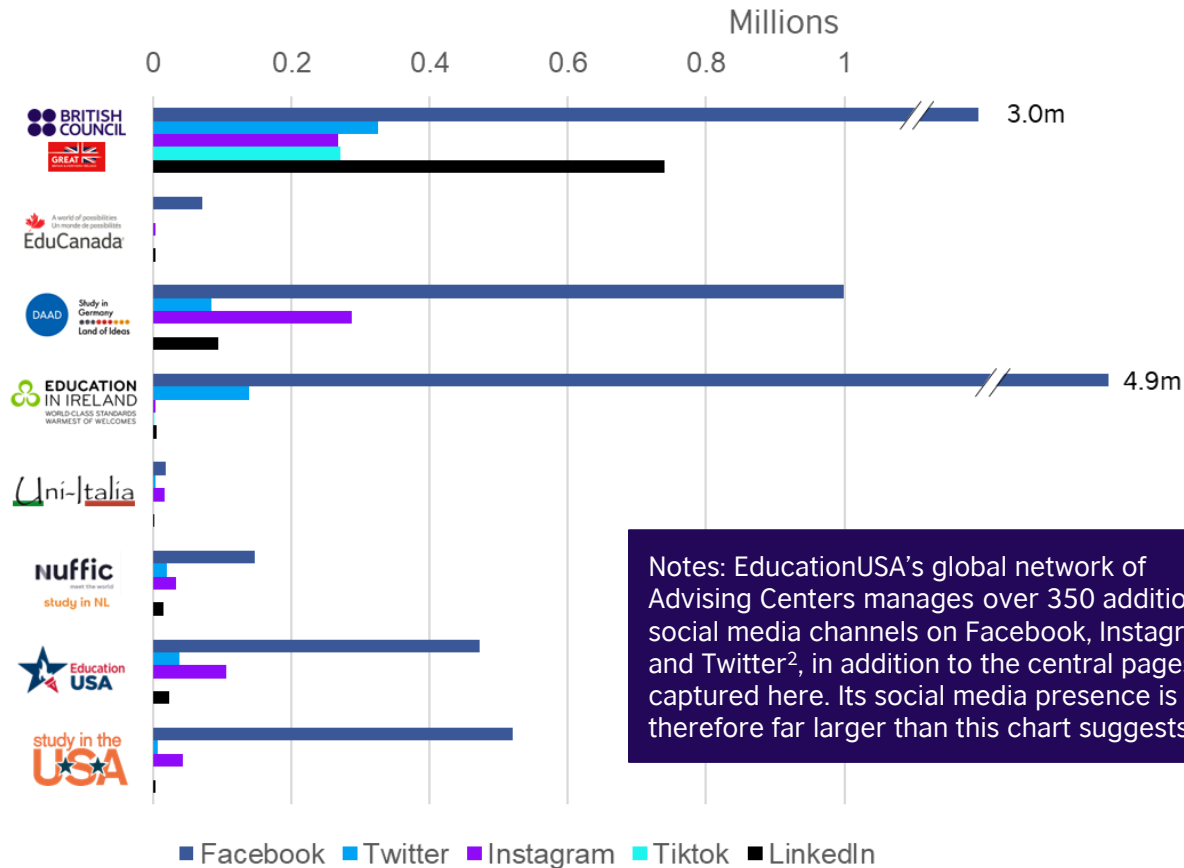
Nuffic provides HEIs with a **range of online resources** to help them attract international students, including a [compilation of key insights](#) about the internationalisation of HE and [Study in NL promotional material](#)



EducationUSA produces an **annual Global Guide** to support USA HEIs in their approach to international student recruitment and runs a regular webinar series "EducationUSA dialogues"

The British Council has a strong social media presence and has a far greater Tiktok and LinkedIn presence than any other NEA; all NEAs have the greatest reach on Facebook

Followers by social media platform in November 2022¹



Notes: EducationUSA's global network of Advising Centers manages over 350 additional social media channels on Facebook, Instagram and Twitter², in addition to the central pages captured here. Its social media presence is therefore far larger than this chart suggests

Key takeaways

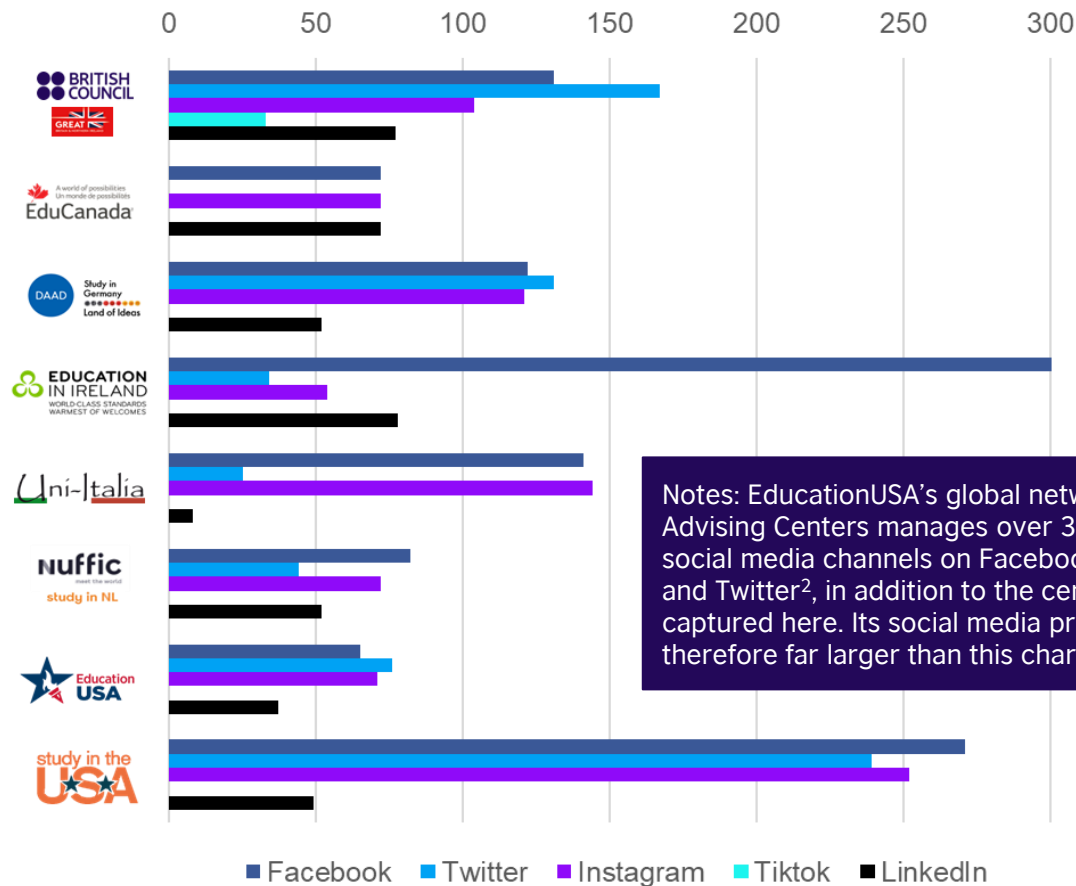
1. Facebook is the platform with greatest reach for all NEAs
2. At 3.6m combined followers British Council has one of the highest total followings of all NEAs
3. At 270,000 followers **British Council/Study UK has a much greater TikTok presence** than any other NEA
4. Education in Ireland, Uni-Italia and EducationUSA segment their audience and use **multiple accounts to target different countries**
5. Whilst data on EducationUSA's country-specific pages is unavailable, **this approach has been successful for Education in Ireland**. Indeed, its page for India has 3.7m followers, the highest following for any NEA page
6. **Uni-Italia has been less successful** in attracting followers, with only 9700 followers on its biggest page

Notes: The social media followings for NEAs and their respective campaigns (e.g. British Council and Study UK) have been combined in this chart. Please see Appendix C for a breakdown of followers by account. Similarly, where an NEA has multiple accounts on the same social media platform targeting students from different countries (e.g. Education in Ireland and Uni-Italia), the total number of followers across these accounts has been presented. Study in Italy is not included as it has no social media presence. The 5 social media platforms included here are those judged to be most influential for prospective EU students; however, some NEAs are also active on other platforms including Weibo, WeChat, Spotify and Pinterest.

Sources: ¹ The PSC analysis of NEA social media; ² [EducationUSA](#)

The British Council is one of the most regular posters on social media, and is most active on Twitter; there is a weak positive correlation between number of posts and followers for NEAs

Number of posts by social media platform from 1st Sept - 30th Nov 2022¹











Notes: EducationUSA's global network of Advising Centers manages over 350 additional social media channels on Facebook, Instagram and Twitter², in addition to the central pages captured here. Its social media presence is therefore far larger than this chart suggests

Key takeaways

1. Across all platforms from 1st September to 30th November 2022, **NEAs posted most regularly on Facebook** (1325), followed by Instagram (890) then Twitter (716)
2. **Study in the USA (811) posted the most content on social media**, followed by Education in Ireland (607) then the British Council (512)
3. There is a **weak positive correlation between the number of posts and number of followers** for NEAs on each social media platform
4. However, whilst **DAAD and the British Council have above expected numbers of followers on Facebook** considering how regularly they post, Study in the USA has below expected numbers of followers on Instagram and Twitter considering how much it posts.
5. Although the spend on each social media platform is not published by the NEAs, we can **infer from this data on activity that the most NEA social media spend relates to Facebook**, closely followed by Instagram and then Twitter

Notes: In the case of Education in Ireland and Uni-Italia, these figures include posts on social media channels that specifically target non-EU students. Study in Italy is not included as it has no social media presence. The 5 social media platforms included here are those judged to be most influential for prospective EU students; however, some NEAs are also active on other platforms including Weibo, WeChat, Spotify and Pinterest. Sources: ¹ The PSC analysis of NEA social media; ² [EducationUSA](#)









NEA social media messaging aims to both emphasise their country's strength, whilst alleviating concerns in areas they are weaker; career opportunities are a recurrent theme

NEA	Key messages
 BRITISH COUNCIL	Emphasises a long history of providing high quality education, practical hands-on experience for students, strong student services and excellent peer/teacher support for students.
 A world of possibilities Un monde de possibilités EduCanada	Emphasises high-quality research outputs, affordable costs of living, scholarships, safety, natural beauty, diversity and inclusivity, and careers opportunities especially in STEM.
 DAAD	Takes advantage of Germany's finance offer with lots of information on scholarships, cost of living, and tuition fees. Also highlights strong research, practical learning, the digital offer in German HE, the ability to learn courses in English and the multiculturalism of German HE.
 EDUCATION IN IRELAND WORLD-CLASS STANDARDS WARMEST OF WELCOMES	No particularly strong message on quality of education, but focuses on scholarships, immigration routes and career opportunities, as well as Ireland's nature, culture and arts.
 Uni-Italia	Minimal messaging on student lifestyle, focusing on information on scholarships, the application process and the availability of courses in English.
 nuffic meet the world	Highlights the availability of courses in English and the rich culture and arts of the Netherlands. Lots of information on applications, student jobs and student housing.
 Education USA	Lots of motivational quotes and self-help posts. Their more specific posts stress the diverse range of courses and institutions and scholarships/funding support available
 study in the USA	Highlights the wide range of options, great teaching, practical learning, high world ranking and peer/teacher support in USA institutions. Emphasises how community colleges provide an affordable option. Points to multicultural, inclusive campuses, student societies and great careers opportunities

Key takeaways
1. StudyX¹ branches of NEAs tend to be more informal in their messaging (e.g. Study UK's TikTok is dominated by lifestyle content)
2. A key part of USA messaging is on finance and scholarships , as they are likely aware this is a concern amongst students. Meanwhile, DAAD make active efforts to highlight Germany's advantageous finance offer
3. Messaging recognises that career opportunities are a key for students
4. NEAs go to great lengths to present their countries as great places to be, from landscape videos to direct student testimonials
5. When country HE systems have specific strengths they are known for, messaging will highlight this (e.g. UK's history, USA's diversity of study)

Notes: ¹ StudyX branches refers to the following campaigns: Study UK, Study in the USA, Study in Germany, and Study in NL
Sources: The PSC analysis of social media

NEAs take a wide range of stylistic approaches to boost their social media engagement

NEA	Key aspects of their social media style
	All posts are accompanied by a high-quality image or video. Study UK specifically includes lots of case studies from alumni. Their TikTok is significantly more informal and has little overlap with their Facebook. They also host live events.
	Every post consistently uses #StudyinCanada and includes a high-quality image. Whenever a specific HEI is mentioned EduCanada will link to the HEI website, so its social media acts as a portal to the wider HE sector.
	Always responds to comments with more info, very consistent branding and hashtags. Study in Germany provides most messaging through the voice of students. Has series of posts (e.g #Germankareoke series learning new German words or series on German student recipes).
	Lots of high-quality videos accompanying posts. It has good engagement with HEIs regularly retweeting content from HEIs and linking to HEI websites on LinkedIn.
	Posts identical content across Facebook and Instagram. Uses easily identifiable hashtags.
	Nuffic makes an effort to have posts in both Dutch and English (either in the same or separate posts). Their Study in NL branch also has weekly takeovers by international students on Instagram, alternating between students from universities and universities of applied sciences. It also has lots of videos with student ambassadors.
	Very positive tone through motivational quotes and self-help posts. Every Facebook post is duplicated on Instagram. Instagram also has a few additional posts.
	Includes posts in written in Spanish and one post in Vietnamese. Posts always accompanied with a colourful image or video that grabs the viewers attention.

- ### Key takeaways
1. All NEAs use an **enthusiastic and positive tone** and **high-quality images or videos**
 2. Study in NL has **weekly takeovers by international students** on Instagram
 3. EduCanada's consistent linking to the HEI website means its social media acts as a very useful **portal to the wider HE sector**
 4. Study in the USA uses a **range of languages** to reach target audiences
 5. Beyond the country-specific pages of Education in Ireland, Uni-Italia and EducationUSA, there is no **clear public evidence of NEAs segmenting their audiences** and substantially tailoring their messaging accordingly







Notes: These reflections refer to the primary social media pages of each of the NEAs which are most likely to be viewed by EU students. It does not reflect content on country-specific pages for Education in Ireland, Uni-Italia or EducationUSA.

Sources: The PSC analysis of social media

NEAs do not publish their communication channel expenditure, so it is not possible to find comparable information across competitors

Publicly-available information on NEA spending related to communications.

Note these figures are not directly comparable.

	Budget detail	Value (£000)	Notes
 Canada	Global Affairs Canada, Targeted digital marketing strategy (2019-2024) ¹	6,114	Global Affairs Canada (GAC) is public body responsible for EduCanada. GAC's digital marketing may involve other campaigns than EduCanada.
 Germany	Consortium for International Higher Education Marketing, Total actual spend (2021) ²	1,117	The International Higher Education Marketing programme supports DAAD HE marketing, and HEIs to develop effective marketing. However, this may not cover all HE related communications spend within DAAD.
 Ireland	Education in Ireland, Total budget (2021) ³	726	Communications are a key part of Education in Ireland's activities, but this budget will also include activities such as attending careers fairs.
 Italy	Uni-Italia, Total actual spend (2021) ⁴	820	Communications are a key part of Uni-Italia's activities, but this budget will also include activities such as in-person events.
 Netherlands	Nuffic, Communications budget (2021) ⁵	1,957	Nuffic's communications budget will involve wider communications than just those aiming to attract international students.
 United States	EducationUSA, Total actual spend (2021) ⁶	11,345	Communications are a key part of EducationUSA's activities, but this budget will also include activities such as running advising centres.

Key takeaways

1. As noted on the previous slides, **NEAs do not directly publish data on communications channel spend**
2. Assuming that post volumes correlate to expenditure would suggest that Study in the USA, Education in Ireland, and the British Council spend the most on social media
3. We have **presented publicly-available spending data for NEAs**. For NEAs with broader remits, we have provided communications budgets where provided. For NEAs focused on attracting international students, we have included total budgets. **These are included for information**, and should not be directly compared.

Notes: Prices adjusted to GBP using Google Finance using prices on 16/12/2022.






















Sources: ¹ [Government of Canada](#), ² [DAAD](#), ³ [Enterprise Ireland](#), ⁴ [Uni-Italia](#), ⁵ [Nuffic](#), ⁶ [US Advisory Commission on Public Diplomacy](#).

6. Learning from HEIs in competitor countries



HEIs across the 6 competitor countries and the UK take a range of approaches to attracting prospective international students and supporting them once they arrive

We surveyed the support offered to international students from 14 HEIs across the 6 competitor countries and the UK. In each country we selected two HEIs which attract high numbers of international students: one highly-ranked and the other lower-ranked in the QS World University Rankings 2023. We ensured these HEIs were geographically distributed (i.e. not in the same city) and reflected multiple 'types' of HEIs in countries with clear divisions between Research Universities and Universities of Applied Sciences.

	United Kingdom		
	Canada		
	Germany		
	Ireland		
	Italy		
	Netherlands		
	United States		

The standard package for international students

These 14 HEIs provided many of the same services for international students both before and after the application process, as outlined below.

Standard support for prospective students

- A specific webpage dedicated to information for international students
- Virtual and in-person education fairs
- A range of practical online information on finding a course, applications and visas
- Contact details for the International Support Office

Standard support for current students

- An International Support Office which can provide practical and emotional assistance to international students
- An international network or community of students, with regular events to support integration and share experiences

However, many of these HEIs also provide more unusual or extensive support to international students as outlined on the following two slides.

The HEIs surveyed provided a variety of more extensive support to prospective international students before the application process, supporting them to better understand the HEI

Country or region-specific webpages

Trinity College Dublin (TCD) and Imperial College London support prospective international students to understand what studying at the HEI will mean for them by providing specific webpages for those from different countries or regions.

For example, TCD allows students to pick their country from a list of every country in the world, before providing tailored academic and English language entrance requirements, visas and fee guidance (see below).

Undergraduate Requirements

Trinity is delighted to accept students who have completed the below qualifications (from Belgium):

Flanders

- Diplôme van Secundaire Onderwijs
- Diploma van de Hogere Secundaire Technische School

Wallonia

- Certificat d'Enseignement Secondaire Supérieur
- Abschlusszeugnis der Oberstufe des Sekundarunterrichts
- Diplôme d'Aptitude à Accéder à l'Enseignement Supérieur



Conversations with existing students

Several HEIs enable prospective students to speak directly to current international students about their experiences. At the Politecnico di Milano this takes the form of one-to-one live virtual conversations, whereas student ambassadors at the University of Amsterdam can receive messages from prospective students through a chat portal (see below).

Oisín
Bachelor Psychology
University of Amsterdam - International students
[Chat with Oisín](#)

I COME FROM
Dublin, Ireland 🇮🇪

PREVIOUS QUALIFICATION
Irish Leaving Certificate

ABOUT ME
Hi everyone! My name is Oisín, I am 19 and I come from Dublin, Ireland...

[Read more about Oisín ...](#)

Baturalp
Bachelor Economics and Business Economics
University of Amsterdam - International students
[Chat with Baturalp](#)

I COME FROM
Ankara, Turkey 🇹🇷

PREVIOUS QUALIFICATION
International Baccalaureate Diploma (IB Diploma)

ABOUT ME
Hey! I'm Baturalp, a 3rd-year Economics & Business Economics student a...

[Read more about Baturalp ...](#)



Courses for high school students

The University of Edinburgh offers paid pre-university courses for high school students in Social Sciences, Humanities and Design (see below). Giving students a real sense of life at the University is likely to persuade them to apply for full Higher Education programmes in later years.

The courses range from one to two weeks, and are delivered on the University of Edinburgh campus by year-round teaching staff.



Several HEIs also provide more extensive support to international students between the application process and the start of the academic year

A list of approved education agents

The University of Edinburgh and the Hague University of Applied Sciences (see below) both provide a country-by-country database of approved education agents they are in communication with and endorse for use by international students. In both cases, this includes representatives in approximately half of EU countries, although notably not in France or Germany in either case.

Representatives Worldwide

We have representatives in the countries and territories listed below. A list with all contact details can be found in [this overview](#) (updated March 25, 2021).

- Africa +
- Asia +
- Central America +
- Europe +
- North America +
- South America +



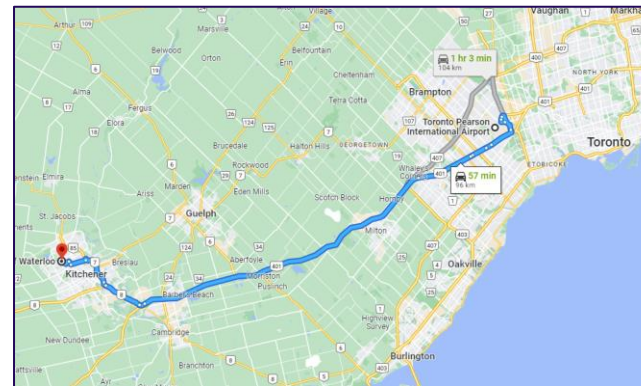
THE UNIVERSITY
of EDINBURGH

THE HAGUE
UNIVERSITY OF
APPLIED SCIENCES

Transfers from the airport to campus

The University of Waterloo provides a free airport pick-up service Toronto's Pearson International Airport for all new international students (see below).

Meanwhile, Rochester University collaborates with taxi services and hotels near the airport to offer discounted rates to their international students for transfers from the airport to campus.



A comprehensive relocation service

The Student Relocation Service at the Technical University of Munich is an all-inclusive onboarding package for international students, including administrative support (e.g. with visas), support finding accommodation, airport pickup, a language course, sight-seeing trips and access to a personal relocation consultant. However, at €3,900 for the basic package, it is very expensive (see below).

Our services in detail

You can choose from 3 different packages plus the VISA service

	BASIC PACKAGE 3,900 €	PREMIUM COMFORT PACKAGE 5,900 €	PREMIUM TAILOR-MADE PACKAGE 7,900 €
<ul style="list-style-type: none"> personal relocation consultant in Germany support with registration at local citizens' office and other administrative matters assistance with health & liability insurance pick-up at arrival, mobile phone SIM card 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<ul style="list-style-type: none"> semester ticket for public transportation language course, intercultural training orientation tour & sight-seeing trips Good-bye service / off-boarding 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<ul style="list-style-type: none"> intermediation of a high-quality furnished single apartment at a student residence for about 870,-€/month incl. utilities + ancillary costs plus electricity (without prior visit) * 	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<ul style="list-style-type: none"> temporary accommodation in a furnished apartment or hotel room for the first 4 weeks after arrival 	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<ul style="list-style-type: none"> up to 3 accompanied apartment viewings according to your individual requirements help from your personal relocation consultant in understanding a German lease contract 	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Technical
University
of Munich



Many HEIs offer additional language support to help international students integrate in a new country and succeed academically, and this takes a range of forms

Formal language courses

The majority of HEIs provide a range of language courses for students, or signpost to language courses provided elsewhere.

For example, Politecnico di Milano provides a range of language courses in Italian, English and other foreign languages for students. The Italian language courses are free for all students, whilst English language courses cost €100 for 40 hours of tuition. Further paid courses are offered in Mandarin, Japanese, German, Russian, French, Portuguese and Spanish.

LANGUAGE COURSES

- › English language courses
- › Italian language courses for international students
- › Other foreign languages courses



Language tutors

At the Istituto Europeo di Design, an optional language tutoring service offers support throughout the academic year to foreign students on courses taught in Italian. Students can book appointments with tutors as and when they need them for no charge.



Informal conversation groups

The University of Rochester provides informal English classes and conversation groups which are free to all students, focusing on academic and professional writing, plus public speaking and conversation practice (see below).

Meanwhile, The International Campus Life team at the Technical University of Munich run a Language Cafe to support international students to develop their German in an informal setting.



The range of additional support offered to help international students to adapt to life in a new country includes buddy systems, day trips and family support networks

A buddy system for new students

In their first months at the Istituto Europeo Di Design (IED), international students are supported by buddies - older international students who help them integrate into the IED community, adapt to student life and start to explore Milan (see below).

The University of Edinburgh provides similar support through its 'Global Buddies' programme.

The Buddy Project

During the first months at university, newly enrolled international students will have the opportunity to be supported by Buddies, or rather older students who, with their experience and enthusiasm, will help them integrate into the IED community and help them adapt to student life and start to explore Milan.



Day trips to explore the country

The Imperial College London International Student Support team provides a range of day trips to natural and cultural attractions around the UK for international students, helping them to more fully experience the country and culture (see below).

Meanwhile, the International Campus Life team at the Technical University of Munich a range of excursions around Germany, alongside Länderabend ("country evenings") hosted by students from different countries.



Support for families and partners

At Imperial College London, the International Family Network brings together international students with families, allowing them to socialise, share experiences and support each other in the transition to life in London.

Similarly, the Caltech International Spouses Club (see below) is open to spouses and partners of Caltech students with international backgrounds, bringing people together to share similar experiences of moving to California



7. Considerations for the UK HE Sector



Identifying key opportunities and threats for the UK HE Sector in attracting EU Students

Based on the findings of this competitor analysis we have identified five key opportunities and five key threats for the UK HE sector.

Opportunities

1. The UK has **a large, diverse and high-quality Higher Education sector**, and celebrating the quality of this education can be used to counteract student concerns about tuition fees and value for money
2. The UK has **strong student services and course completion rates** in comparison to many competitors, providing strong selling points for the British Council to draw on
3. The sector has the opportunity to emphasise how **student visa applications are easier, quicker and more likely to be successful** than in the USA or Canada, whilst **UCAS makes the process of applying to HEIs straightforward**
4. The British Council has the **opportunity to learn from the wide range of additional services offered by competitor NEAs**, and consider replicating and adapting their approaches, including the provision of summer programmes for teenagers and live chat to student ambassadors
5. Several **EU countries with many outbound international students are not currently being targeted** by any competitor NEAs, including Greece and Romania

Threats

1. **High tuition fees are a key barrier** for many EU students looking to study in the UK, with average fees higher than in all competitor countries bar the USA and no government funding support available for EU students
2. **Exiting the EU has made the UK a less attractive destination** for EU students due to increasing tuition fees, the need for a visa and the perception of a less welcoming nation
3. **Competitor countries are more actively promoting the lifestyle** in their country than the British Council, risking losing interest from some EU students who already perceive the UK's lifestyle as a drawback
4. The **lack of clear signposting to key British Council resources** for prospective EU students and advisers risks not fully capitalising on the value of these resource for attracting EU students
5. The **simultaneous targeting of Germany, France, Spain and Poland by several competitor NEAs** risks minimising the strength of the UK sector's messaging in these countries

Considerations for the UK Higher Education Sector

Market Reach and Positioning

- **Focus messaging on “Value for Money”** – Quality of Education, Career Opportunities, Degree Completion Rates
- **Target postgraduate countries with strong competitive markets**, where price is more comparable with UK
- **Consider undergraduate markets not currently being targeted** by competitor NEAs
- **Leverage online marketing** to go beyond blunt geographical segmentation
- **“Elite talent” vs “Talent from the elite”** – countering “only for the rich” perceptions
- Price is highly correlated with quality, meaning cutting prices for EU students is risky: **consider offering help to less well-off students** and keeping market prices
- Lobby **to remove/reduce low-value, high end-user cost barriers** (e.g. health surcharge upfront payment where students are eligible for reimbursement; short-term visa issues)

Leveraging Underexploited Advantages

- Broaden messaging to highlight **diverse, welcoming and multinational** culture
- Highlight and/or reinforce the **level of student support** available
- Highlight **niche courses, especially with clear career paths**, which are often unavailable in EU markets
- Highlight/reinforce the UK as **“The home of English”**
- Highlight the relative **simplicity of the visa process**
- **Alumni ambassador schemes, alumni reach and events** in EU markets

Actions for the British Council

- Improving **signposting and Search Engine Optimisation** to leverage existing online content
- Enhance **collaboration with UKVI** to share visa guidance for students and advisers
- **Improve information flows** to key stakeholders, especially on finance