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International

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INTERNATIONAL STUDENT RECRUITMENT: WHY AREN'T WE SECOND?

PART 2

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EXECUTIVE SUMMARY

International student recruitment is becoming increasingly competitive and although the UK was still ranked the second most popular study destination globally in 2018, its position has become vulnerable. The UK only has a small lead on Australia, which ranked third, and it lost market share in 16 out of the 21 top sending countries and territories between 2010 and 2018.

This report, which is a collaboration between Universities UK International (UUKi) and IDP Connect, examines why the UK is underperforming in selected countries and how it can become a more attractive study destination for international students. It compares the UK and competing study destinations on their policies relating to international students, provides an overview of sending countries' macro-environments and development strategies, and analyses the factors that influence students' decisions on study destinations. Ultimately, the report provides recommendations for UK higher education institutions, the wider sector and the UK government on how we can best combine our efforts to support the UK's recruitment endeavours and meet the International Education Strategy's target of diversifying recruitment markets and increasing international student numbers in the UK to at least 600,000 by 2030.

The research is based on quantitative data analyses of relevant HESA and UNESCO data, as well as qualitative in-depth and focus group interviews with prospective students, alumni and recruitment agents from eight countries: Brazil, India, Indonesia, Nigeria, Pakistan, Saudi Arabia, South Korea and Vietnam.

THE UK AS A STUDY DESTINATION VS ITS COMPETITORS

Strategies and policies regarding international students vary between countries and can impact the attractiveness of a study destination. The report compares the UK, Australia, Canada, New Zealand, the US, France, Germany and the rising Asian destinations China, Japan and Malaysia on their framework conditions for international student recruitment, that is, their international education strategies, national study campaigns, visa regulations and financial support, as well as their immigration and employment policies. It shows that the UK provides an attractive environment for international students and its offer is broadly comparable to other study destinations. However, the UK is comparatively more expensive in terms of tuition fees, student visa fees and health surcharge. Compared to other national study campaigns, the Study UK campaign does not provide detailed and prominent information on the different UK nations, or offer a scholarship search tool. Additionally, the UK's Graduate route offers slightly fewer benefits in terms of length of stay or routes to permanent residency compared to other English-speaking study destinations.

COUNTRY ANALYSIS – WHY AREN'T WE SECOND?

To better understand how and why students select a specific study destination, the country analysis focuses on eight recruitment markets within three categories, where the UK should maintain its position (Nigeria, Saudi Arabia), where it should regain its position (India, Pakistan) and where it should develop its position (Brazil, Indonesia, South Korea, Vietnam). A country overview for each market demonstrates the opportunity for recruitment from a broad perspective. The analysis reveals that students take into consideration cost effectiveness, return on investment and career options when choosing a study destination abroad. The factors that influence their decision the most include affordability – especially scholarship availability, post-study work opportunities, welcome and safety, and quality of education. However, each factor's magnitude varies from country to country and understanding each context is crucial for a targeted approach to improve the UK's recruitment performance.

RECOMMENDATIONS – HOW COULD THE UK DO BETTER?

There are four key recommendations that the UK government and the higher education sector should collaborate on to ensure the UK remains competitive in a changing international policy landscape.

1. Improve the promotion of the UK as a welcoming, diverse and accessible study destination.

Specific recommendations include:

- improving coordination between the efforts of individual institutions and national branding and marketing campaigns, including Study UK, Scotland is Now and Study in Wales
- establishing promotional delegations that have media- and student-facing activities and the promotion of the Graduate route at their heart, led by the International Education Champion and the UK government
- maintaining the evidence base of the UK's competitive advantage, including outcomes of its international graduates

2. Ensure the success of the Graduate route.

Specific recommendations include:

- continually promoting the Graduate route following its launch this summer and improving the promotion of the route in key countries
- developing ways to monitor the implementation and uptake of the Graduate route
- working with the business sector to promote the new immigration route to students and UK employers
- developing a strategic institutional approach to supporting the employability of international students and graduates
- funding a pilot programme that will develop and roll out a model International Graduate Export Placement Scheme

3. Reduce financial barriers for international students through the creation of more diverse and innovative funding opportunities.

Specific recommendations include:

- creating a national scholarship brand that could be used to promote existing scholarships, both university and sector/government co-funded, and increase the number of co-funded scholarships available
- pursuing innovative government-to-government partner models for co-funding scholarships
- expanding the UK government scholarship offer into key EU markets
- reviewing visa costs to bring them in line with international competitors

4. Support the improvement of English language ability.

Specific recommendations include:

- working with the British Council to develop a long-term strategic approach to market development through investment in English language education
- supporting the recovery of the UK-based English language sector, which has been severely affected by the Covid-19 pandemic¹

INTRODUCTION

International student recruitment is beneficial for both the study destination and the students who come to gain a degree and valuable experiences from high-quality universities. The value of international students is reflected in the UK's International Education Strategy (2021) which sets out the ambition to diversify student recruitment and increase the number of international students in the UK to at least 600,000 by 2030.

However, international student recruitment has become increasingly competitive with more and more countries offering an attractive study environment. Universities UK International (UUKi) has therefore long been in conversation with members and government about how to enhance the UK's international student recruitment performance: on which countries should the sector focus its efforts and why? How can government make the UK an even more attractive destination to support the sector in its endeavours?

In August 2020, UUKi, together with Education Insight, published a first report, *International Student Recruitment: Why aren't we second? Part 1*,² to better understand in which of the world's top 21 sending countries and territories the UK is underperforming. The report identified three categories of market where the UK should **MAINTAIN**, **REGAIN**, or **DEVELOP** its market position.











This study now provides a deeper analysis of eight of the countries from across the three categories to uncover why exactly the UK is underperforming. It compares key study destinations' policies relating to international students, provides an overview of the recruitment markets' macro-environments and development strategies, and analyses the factors that influence students' selection of a study destination. The objective is to gain a deeper insight into what matters to prospective students in target countries and what makes a study destination attractive. Ultimately, the report provides recommendations for UK higher education institutions, the wider sector and the UK government on how we can best combine our efforts to support the UK's recruitment endeavours and meet the International Education Strategy's target.

BACKGROUND AND LITERATURE REVIEW

INTERNATIONAL STUDENT RECRUITMENT

International students bring great benefits to the UK. Much research has focused on the economic and financial contribution of students through tuition fees, living costs and tourism.^{3,4,5,6} Additionally, studies have shown that international students have a positive impact on the overall student experience⁷ and students' personal development,⁸ as well as a country's soft power, by building networks, creating cultural understanding and influencing perceptions of the UK.^{9,10} Universities and government therefore have a keen interest in the UK's attractiveness as a study destination.

Since the early 2000s, the UK has been the second most popular study destination in the world, but this position has become increasingly vulnerable as the UK's recruitment performance has notably declined. The UK's international student numbers showed slowed growth of under **1%** between 2014 and 2017 and only **3.8%** in 2018, while other countries, such as Australia, Canada and Germany have demonstrated steady year-on-year growth. Australia, which ranks behind the UK, demonstrated year-on-year growth in its international student numbers since 2014, reaching **16.6%** in 2018. The difference in total numbers between the UK and Australia in 2018 was very slim, with a difference of only about **7,600** international students (see [Table 1](#)).^{11,12}

RANK	COUNTRY	INTERNATIONAL STUDENTS 2018	% CHANGE 2017-2018	INTERNATIONAL EDUCATION MARKET SHARE 2018
1	 United States	987,313	0.2%	17.7%
2	 United Kingdom	452,079	3.8%	8.1%
3	 Australia	444,514	16.6%	8.0%
4	 Germany	311,738	20.4%	5.6%
5	 Russia	262,416	4.7%	4.7%
6	 France	229,623	-11.1%	4.1%
7	 Canada	224,548	6.9%	4.0%
8	 Japan	182,748	11.2%	3.3%
9	 China	178,271	13.5%	3.2%
10	 Turkey	125,138	15.8%	2.2%

Data source: UIS.Stat, June 2021

Additionally, as of 2018, the UK's market share has dropped in **16** out of the world's top 21 sending countries and territories as key English-speaking study destinations present stronger competition (see [Figure 1](#)). Besides, a shift towards increased regional student mobility has given rise to new players across Europe, especially Germany, the Netherlands and Poland, but also in Asia, such as Malaysia and Japan.¹³ For comparison, [Figure 2](#) shows the top twenty domiciles of international students in the UK, ordered by 2019–20 rank.

FIGURE 1: CHANGES IN UK MARKET SHARE IN THE WORLD'S TOP 21 SENDING COUNTRIES AND TERRITORIES (2010-2018)

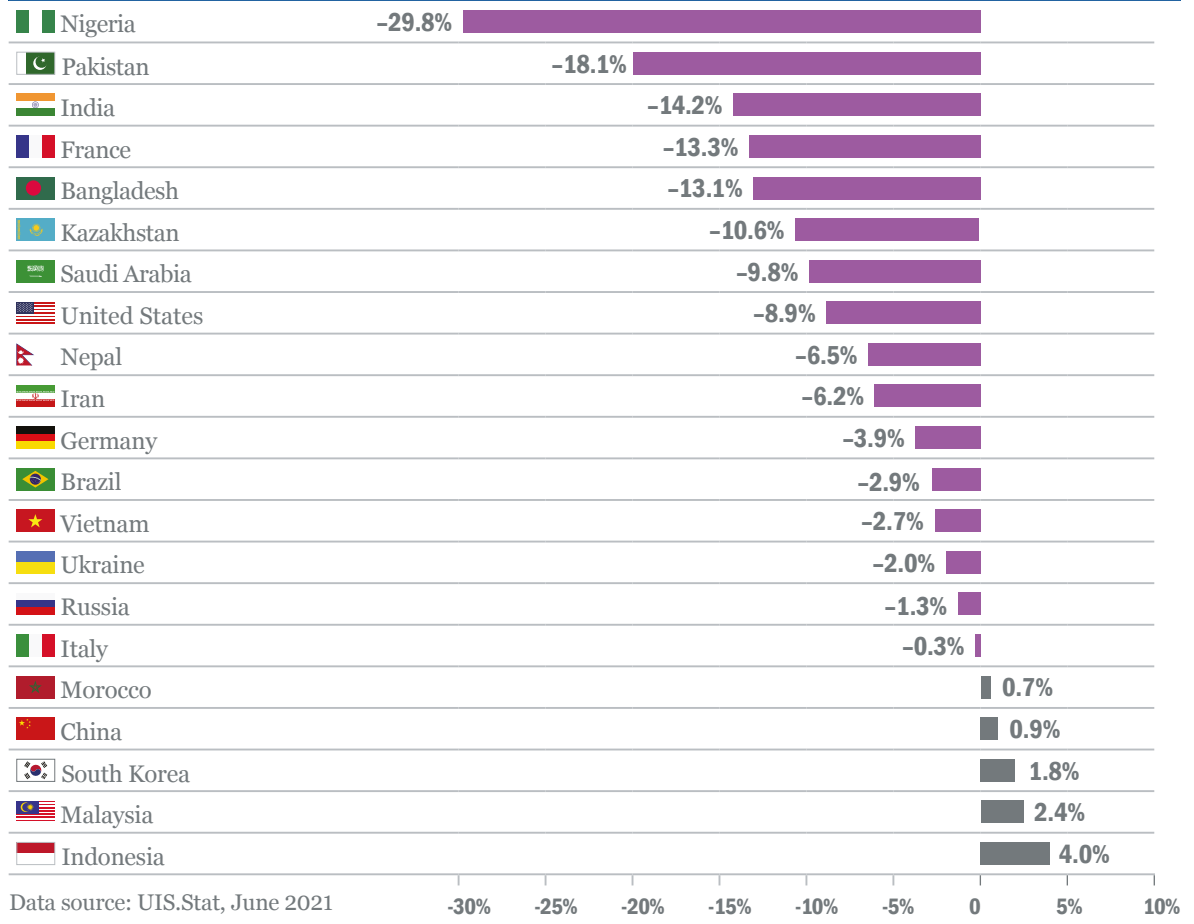
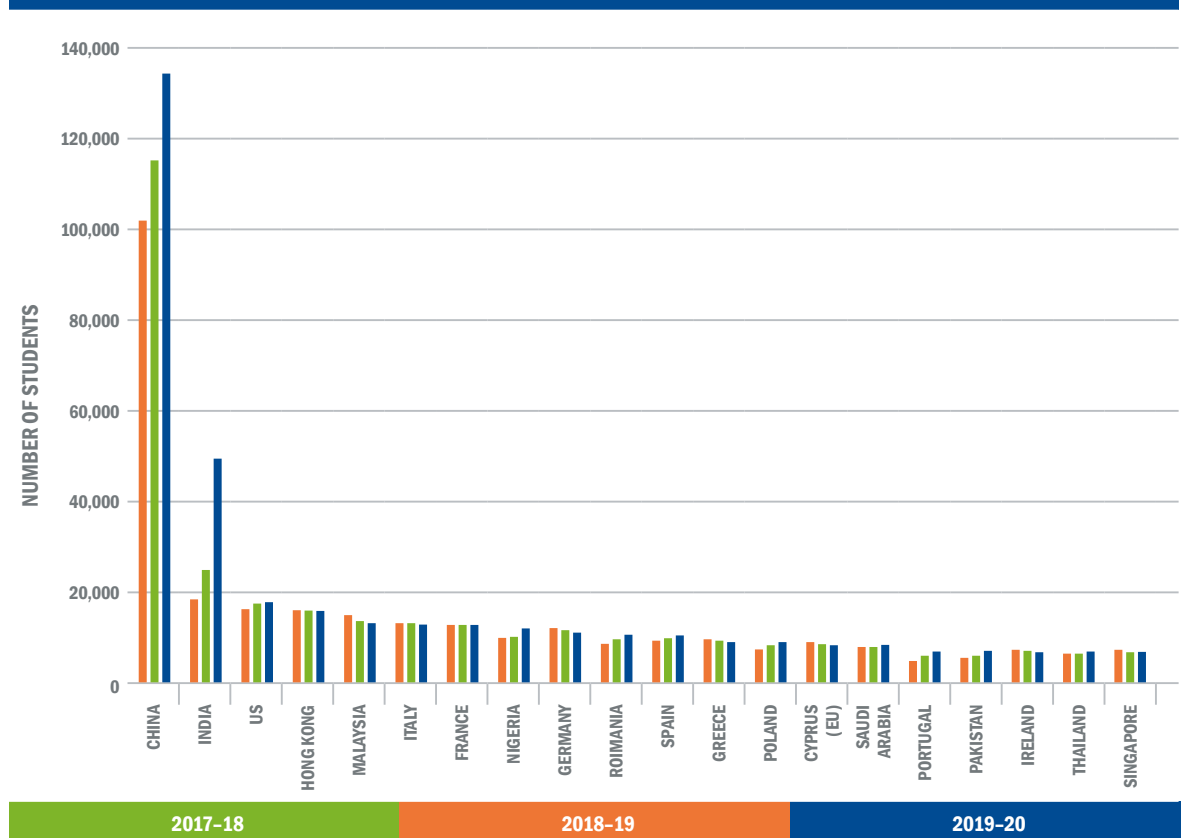


FIGURE 2: TOP 20 DOMICILES OF INTERNATIONAL STUDENTS IN THE UK (BY 2019-20 RANK)



Data source: HESA Student record, multiple years.

STUDY DESTINATION CHOICES

As the benefits of international students are recognised across the world, competition for international students is rising and numerous studies have focused on uncovering key factors that affect the attractiveness of a study destination and influence students' decisions.^{14,15} Most studies that examine international students' study destination choices employ a quantitative methodology through large-scale surveys with prospective students worldwide.¹⁶ Few studies use a qualitative approach, with in-depth interviews or focus groups, or look at selected regions, such as Africa¹⁷ or Asia,¹⁸ or specific countries, such as India.¹⁹

Results from different pieces of research have identified factors that can be grouped into four categories:

- 1. Financial:** Over the years, studies have revealed that financial factors, including living costs in the host country, tuition fees and availability of scholarships, lead the list.^{20,21} The QS International Student Survey (ISS) 2020 showed that out of 33,352 prospective students who were interested in studying in the UK, 77% were most worried about the cost of living and 65% were concerned with the availability of scholarships.²² Similarly, the i-graduate International Student Barometer (ISB) which surveyed over 110,000 students globally in in 2017, revealed that 74% of respondents cited institution scholarships and funding as factors driving their decision.²³ IDP Connect found that that students and parents, when considering the UK alongside the US, Australia, New Zealand and Canada, ranked the UK fourth (just before the US) in terms of affordability.²⁴
- 2. Welcome and safety:** Other key factors that influence students' study destination decisions are related to immigration, being made to feel welcome and their safety. The ISS 2020 showed that safety was a prominent concern for 55% of international students, whilst 38% were worried about being made to feel unwelcome. The ISS 2019 focused specifically on the impact of Brexit on international students and found that although Brexit had not significantly affected students' interest in studying in the UK, 49% of those that were less interested in studying in the UK as a result of Brexit said that the UK is less welcoming to international students.²⁵ Studies which demonstrated that parents influence study destination choices also revealed that they care above all about safety.^{26,27} For example, the Student and Parent Buyer Behaviour Survey 2019 examined the perceptions of more than 2,300 students and 720 parents regarding the attractiveness of five major study destinations – Australia, Canada, New Zealand, the US and the UK – and demonstrated that the perceived safety of a destination was prioritised by parents. According to student and parent perceptions, the UK was ranked after Canada, New Zealand and Australia in terms of safety.²⁸
- 3. Quality of education:** A third category is education-related factors, for example, the quality of teaching and research, university ranking and reputation.^{29,30} Quality of education stood out among respondents of the 2017 International Student Survey, in which 26.7% stated that high-quality teaching was the most important factor driving their decision on a study destination.³¹ A study by the British Council from 2015 found that the perceived quality of UK higher education is the main reason (cited by 51% of respondents) that international students come to study STEM courses in the country.³²
- 4. Employment:** Finally, employment, such as work opportunities during studies but also post-study work options, affects students' decisions.^{33,34} Research shows that there is a strong correlation between post-study work options and growth in international student enrolments.³⁵ The 2015 ISS demonstrated that the top reasons for not choosing the UK was a lack of post-study work options (36.2%).³⁶ Likewise, the Parent and Student Buyer Behaviour Survey 2019 showed that students and parents ranked the UK last of five countries (alongside Australia, Canada, New Zealand and the US) for graduate employment options.³⁷

POLICY CONTEXT

Based on the factors that influence students' study destination choices and to improve the UK's competitiveness, another strand of previous research has focused on providing concrete policy advice. Reports analyse the UK's policy context for international students,³⁸ compare trends and policies in the UK with its key competitor countries^{39,40} or set out policy recommendations^{41,42} to enhance the UK's attractiveness for international students. Some research has also looked at how effectively policy changes are communicated to students.⁴³

Since those policy analyses have been published, however, the context in the UK has changed significantly, and some recommendations have been implemented: in the last two years, the UK has published its International Education Strategy (March 2019, updated 2021) with a clear target to grow international student numbers to at least 600,000 by 2030, the reopening of the Graduate route was announced in September 2019 and the UK completed its exit from the EU with a deal (December 2020).

UK target for international students at least

600,000

by 2030

RESEARCH AIMS AND COUNTRY SELECTION

To build on and complement the existing research, *Why aren't we second? Part 2* focuses on a selected number of the world's top 21 sending countries and territories in Africa, Asia, Latin America and the Middle East to answer two key questions:

- Why is the UK underperforming?
- How can the UK do better?

The selection of countries for the in-depth analysis in this study was based on the analysis of the UK's market position among the world's top 21 sending countries and territories, published in *Why aren't we second? Part 1*. The research identified three categories of markets: those where the UK should **MAINTAIN** its position, **REGAIN** its position, or **DEVELOP** a stronger market position.

Selection took into consideration the difference in the UK's market position between 2010 and 2018, the difference in its market share over the same period, the performance of its competitors, and the existence of opportunities (e.g., linguistic, historical, trade and diplomatic links) to improve recruitment. As a result, the following countries were selected for in-depth analysis: Brazil, India, Indonesia, Nigeria, Pakistan, Saudi Arabia, South Korea and Vietnam.⁴⁴

TABLE 2: MAINTAIN, REGAIN, DEVELOP – THE UK'S MARKET POSITION IN THE WORLD'S TOP 21 SENDING COUNTRIES AND TERRITORIES (2018)

WORLD'S TOP 21 COUNTRIES AND TERRITORIES	MARKET POSITION		MARKET SHARE DIFFERENCE	UK IS RANKED BEHIND ...
	2010	2018		
MARKETS WHERE THE UK SHOULD MAINTAIN ITS POSITION				
United States	1	1	- 8.9%	
Italy	1	1	- 0.3%	
Malaysia	2	2	2.4%	AUSTRALIA
Nigeria	1	2	- 29.8%	US
Saudi Arabia	2	2	- 9.8%	US
China	3	3	0.9%	US, AUSTRALIA
MARKETS WHERE THE UK SHOULD REGAIN ITS POSITION				
Pakistan	1	3	- 18.1%	US, AUSTRALIA
Germany	1	3	- 3.9%	AUSTRIA, NETHERLANDS
France	1	3	- 13.3%	CANADA, BELGIUM
Russia	3	4	- 1.3%	GERMANY, CZECHIA, US
India	2	4	- 14.1%	US, AUSTRALIA, CANADA
Bangladesh	1	6	- 13.1%	MALAYSIA, US, AUSTRALIA, GERMANY, CANADA
MARKETS WHERE THE UK SHOULD DEVELOP ITS POSITION				
Kazakhstan	3	5	- 10.6%	KYRGYZSTAN, TURKEY, US, CZECHIA
South Korea	4	5	1.8%	US, JAPAN, AUSTRALIA, CANADA
Indonesia	4	5	4.0%	AUSTRALIA, US, MALAYSIA, JAPAN
Vietnam	5	6	- 2.7%	JAPAN, US, AUSTRALIA, SOUTH KOREA, FRANCE
Brazil	5 OR 6*	9	- 2.9%	ARGENTINA, US, PORTUGAL, AUSTRALIA, GERMANY, FRANCE, CANADA, SPAIN
Iran	2	10	- 6.2%	US, TURKEY, GERMANY, ITALY, CANADA, AUSTRALIA, INDIA, HUNGARY, FRANCE, AUSTRIA
Nepal	3 OR 4*	11	- 6.5%	AUSTRALIA, JAPAN, US, INDIA, SOUTH KOREA, FINLAND, GERMANY, NEW ZEALAND, CYPRUS, NORWAY
Morocco	9	11	0.7%	FRANCE, UKRAINE, GERMANY, ITALY, SPAIN, US, CANADA, SENEGAL, ROMANIA, TURKEY
Ukraine	10	12	- 2.0%	POLAND, GERMANY, CZECHIA, ITALY, SLOVAKIA, US, AUSTRIA, CANADA, HUNGARY, FRANCE, BULGARIA

Data source: UIS.Stat, June 2021

*Exact ranking unclear due to lack of data for top competitor countries in 2010

The report employs a qualitative methodology based on in-depth interviews and focus groups with prospective students, UK alumni and recruitment agents. Please refer to [Appendix A](#) for details on the methodology and limitations of this research.

The report is structured as follows:

- **Chapter 1** provides a comparison of the policies and framework conditions for student recruitment in the UK and its key competitors.
- **Chapter 2** presents the scope of opportunity for recruitment and analyses factors influencing students' study destination decisions in each country.
- **Chapter 3** provides long-term policy recommendations to improve the UK's competitiveness.

CHAPTER 1

THE UK AS A STUDY DESTINATION VS ITS COMPETITORS

1

Many countries around the world recognise, or are now beginning to recognise, the benefits of international students, which is evidenced by evolving strategies and policies to attract and support larger numbers of international students.

However, strategies and policies regarding international students vary between countries, depending on factors such as geographic location, trade and diplomatic links, and socio-economic development, and can impact the attractiveness of a study destination. To provide a background to the country analysis presented in Chapter 2, this section looks at the framework conditions for international student recruitment in top study destinations, that is, international education strategies, national study campaigns, student visa regulations, costs and financial support, as well as immigration and employment policies. The comparison focuses on the world's top English-speaking study destinations: Australia, Canada, New Zealand, the UK and the US; on the UK's key competitors in Europe: Germany and France; and on China, Japan and Malaysia as newly emerging study destinations. This overview aims to provide a better understanding of how the environment for international students in the UK compares to other highly attractive study destinations.

INTERNATIONAL EDUCATION STRATEGIES, NATIONAL STUDY CAMPAIGNS AND VISA REGULATIONS





In a world where education is quickly becoming more globalised, specialised and competitive, many countries have developed international education strategies to help their sectors become more adaptive, innovative and internationally connected to respond to the opportunities and challenges that arise in this fast-paced environment and in the context of a growing pool of international students.

Table 3 lists each country's current strategy for international education and compares them in terms of student recruitment-related priorities. The comparison demonstrates that the strategies differ in scope and specificity: the US to date has not developed a comprehensive strategy across all relevant government bodies⁴⁵ and while most countries set out a specific recruitment target, it is noticeable that Canada and New Zealand, in their latest strategies, have moved away from a specific numeric goal and instead emphasize the diversification of international students and sustainable growth. France and Japan place a particular focus on offering more courses and degree programmes in English, while Malaysia and China aim to improve the quality of their education systems to make them more attractive to international students. The UK stands out with the most recently updated strategy and clear priorities for the recruitment and diversification of international students.

TABLE 3: COMPARISON OF INTERNATIONAL EDUCATION STRATEGIES				
COUNTRY	STRATEGIC PRIORITIES	RECRUITMENT TARGET	PRIORITY COUNTRIES FOR RECRUITMENT	DIVERSIFICATION
 UNITED KINGDOM National strategy International Education Strategy: 2021 update Supporting recovery, driving growth¹	<ul style="list-style-type: none"> Diversifying international student recruitment Enhancing the international student experience from application to employment Improving outbound student mobility through Turing scheme 	The UK government is committed to increasing the number of international higher education students studying in the UK to at least 600,000 per year by 2030.	The International Education Champion's immediate priorities are India, Indonesia, Saudi Arabia, Vietnam and Nigeria. Other important regional markets include Brazil, Mexico, Pakistan, Europe, China and Hong Kong.	The government aims to support the diversification of international student recruitment by improving the immigration regime, strengthening promotion of the UK's education offer through the Study UK campaign and through the appointment of the International Education Champion.
 UNITED STATES National strategy Succeeding Globally Through International Education and Engagement (Updated 2018)²	<ul style="list-style-type: none"> Increase global and cultural competences of all US students Learn from and with other countries to strengthen US education Engage in active education diplomacy to advance US international priorities 	No recruitment target.	Not specified	Not specified

¹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/958990/International-Education-Strategy-2021-Update.pdf

² <https://www.amacad.org/sites/default/files/media/document/2018-12/Succeeding-Globally-Through-International-Education-and-Engagement-Update-2018.pdf>

TABLE 3: COMPARISON OF INTERNATIONAL EDUCATION STRATEGIES <i>continued</i>				
COUNTRY	STRATEGIC PRIORITIES	RECRUITMENT TARGET	PRIORITY COUNTRIES FOR RECRUITMENT	DIVERSIFICATION
 AUSTRALIA National strategy National Strategy for International Education 2025³	<ul style="list-style-type: none"> Strengthening the fundamentals (world-class education, student experience, quality assurance and regulation) Making transformative partnerships (at home, abroad, mobility, lasting connections) Competing globally (promote excellence, grow international education) 	Analyses project that Australia's onshore recruitment will grow by around 45% by 2025, which equates to Australia hosting around 720,000 students onshore.	The Australian government has identified China, India, Indonesia, Vietnam, South Korea, Malaysia and Hong Kong as important markets to pursue.	Not specified
 CANADA National strategy Building on Success: International Education Strategy 2019–2024⁴	<ul style="list-style-type: none"> Encourage Canadian students to gain new skills through study and work abroad opportunities in key markets Diversify the countries from which international students come to Canada, as well as fields, levels and location of study through promotional campaigns and an enhanced Student Direct Stream 	No recruitment target.	Priority countries include: Brazil, Colombia, France, Indonesia, Mexico, Morocco, the Philippines, Thailand, Turkey, Ukraine and Vietnam.	Diversification efforts will be based on a new marketing strategy in new source countries and increased scholarship funding for incoming international students. China and India will remain important sources of international students for Canada, with a focus on in-country diversification to attract students from different regions within those countries and in other areas and levels of study.
 NEW ZEALAND National strategy International Education Strategy 2018–2030⁵	<ul style="list-style-type: none"> Delivering excellent education and student experience Achieving sustainable growth Developing global citizens 	No recruitment target.	Not specified.	Diversification means expanding the number of countries from which New Zealand draws international students, developing a greater range of innovative products and services offered by New Zealand providers, expanding New Zealand's education consultancy services and the products markets to countries overseas for use in their own education systems.
 FRANCE National strategy Stratégies d'attractivité pour les étudiants internationaux: Bienvenue en France – Choose France (2019) (in French)⁶	<ul style="list-style-type: none"> Simplify the French student visa regime Double the number of FLE and English-medium instruction courses Differentiate tuition fees and triple the number of international scholarships available Launch a global campaign to raise the country's educational profile 	France aims to attract 500,000 international students per year by 2027.	Priority countries include: China, India, Vietnam, Indonesia, Russia, Brazil, Middle East, Ghana, Nigeria, Kenya, Ethiopia, Morocco, Algeria, Tunisia, Senegal, Ivory Coast and the DR Congo.	Diversification efforts are based on attracting students from a wider range of countries. While the strategy maintains the importance of recruitment from francophone countries, the focus is expanded to include Asian and anglophone African countries.

3 https://nsic.dese.gov.au/sites/default/files/docs/national_strategy_for_international_education_2025.pdf

4 <https://www.international.gc.ca/education/assets/pdfs/ies-sci/Building-on-Success-International-Education-Strategy-2019-2024.pdf>

5 <https://enz.govt.nz/assets/Uploads/International-Education-Strategy-2018-2030.pdf>

6 https://ressources.campusfrance.org/agence_cf/institutionnel/fr/Dossier_presse_Strategie_attractivite_etudiants_internationaux_fr.pdf

TABLE 3: COMPARISON OF INTERNATIONAL EDUCATION STRATEGIES <i>continued</i>				
COUNTRY	STRATEGIC PRIORITIES	RECRUITMENT TARGET	PRIORITY COUNTRIES FOR RECRUITMENT	DIVERSIFICATION
 GERMANY National strategy Internationalisation of Education, Science and Research: Strategy of the Federal Government (2017) ⁷	<ul style="list-style-type: none"> Consolidate Germany's position as an internationally attractive location for study and research Remove barriers to the international mobility of German scientists 	Germany aims to attract 350,000 students per year by 2020. (This target was met in 2018 according to OECD data.)	Germany will work to promote a more extensive exchange between Germany and the BRICS countries (Brazil, Russia, India, China and South Africa) as well as other aspiring science nations in Asia and Latin America.	Not specified.
 MALAYSIA National strategy Department of Higher Education Strategic Plan 2018–2022 ⁸	<ul style="list-style-type: none"> Raise the presence of the Malaysian higher education brand through stronger G2G collaboration, promotional and marketing activities Increase partnerships with international organisations 	Total enrolment of international students in Malaysian higher education system is targeted at 176,000 in 2022.	Not specified.	Not specified.
 JAPAN National strategy Top Global University Project ⁹	<ul style="list-style-type: none"> Introduce courses and degree curricula offered in English Expand multicultural programmes for Japanese and international students to study together Offer programmes to international students to study in a manner unique to Japan Establish international dormitories Develop and expand scholarship programmes for students to study abroad Increase the number of foreign faculty 	Japan aims to increase the number of international students to 73,536 by 2023.	Not specified.	Not specified.
 CHINA National strategy China's Education Modernization 2035 (in Chinese) ¹⁰	<ul style="list-style-type: none"> Greater emphasis on the Belt and Road Initiative (BRI) to build up China as a study destination Implement the plan to study in China Establish and improve the quality assurance mechanism of education to study in China and improve the quality of education in China Promote educational exchange between China and other countries 	Not specified. As part of the BRI, China has launched initiatives including exchange programmes with the Philippines and academic collaborations with universities in nine African countries (Namibia, Zimbabwe, Zambia, Botswana, Nigeria, Uganda, South Africa, Sierra Leone, Tanzania).	Not specified.	Not specified.




7 https://bmbf.bmbfcluster.de/upload_filestore/pub/Internationalisation_Strategy.pdf

8 <https://drive.google.com/file/d/1AfP61M7LbwjFZqhxW6KAQ-PmQqrT8NSc/view>

9 <https://tgu.mext.go.jp/en/about/index.html>

10 http://www.xinhuanet.com/politics/2019-02/23/c_1124154392.htm

Table 4 compares national study campaigns in the top English-speaking study destinations. The comparison shows that all countries have government-funded campaigns, but these vary with regards to features, regional information and use of social media platforms. All campaigns at least feature a list of scholarships and a course search tool. However, the websites of EducationUSA, Study Australia and Study in New Zealand stand out, as they offer detailed scholarship search functions that include provider scholarships. In terms of regional information, all the websites offer some information except for EducationUSA, which does not provide any detail on the US states. How prominently this information is displayed differs among the remaining four websites. Study Australia and Study in New Zealand offer particularly detailed overviews that are easy to find and link to regional education websites for further information. Information on the four nations on the Study UK website is comparably hard to find and contains less detail. In terms of social media, EduCanada is only represented on two channels, Study UK and EducationUSA cover the main channels, while Study Australia and Study in New Zealand are also represented on Weibo and WeChat.



TABLE 4: COMPARISON OF NATIONAL STUDY CAMPAIGNS IN TOP ENGLISH-SPEAKING STUDY DESTINATIONS				
COUNTRY	ABOUT	FUNDED BY	SITE FEATURES	REGIONAL INFORMATION
 <p>UNITED KINGDOM</p> <p>Study campaign Study UK¹¹</p>	<p>Study UK is a global campaign that promotes the UK as the first-choice study destination to international students and their influencers. Study UK is led and delivered by the British Council, an executive non-departmental public body, in partnership with the UK government's GREAT Britain campaign.</p>	<p>UK government through the Foreign, Commonwealth & Development Office.</p>	<ul style="list-style-type: none"> List of government scholarships Institution and course search function 	<p>UK nations listed within subheading 'Experience student life' including links to national study campaigns.</p>
 <p>UNITED STATES</p> <p>Study campaign EducationUSA¹²</p>	<p>EducationUSA is a US Department of State network of over 430 international student advising centers in more than 175 countries and territories, which promotes US higher education to students around the world.</p>	<p>US Government through the US Department of State.</p>	<ul style="list-style-type: none"> Scholarship search function by destination state, country of origin and degree level Link to course search websites 	<p>Some states have an official education website but states/destinations do not feature in the EducationUSA website.</p>
 <p>AUSTRALIA</p> <p>Study campaign Study Australia¹³</p>	<p>Study in Australia is the Australian Government's official resource for international students. Australian state and territory study destinations work in partnership with Austrade and other government agencies to deliver information and services to international students. This marketing alliance is called the Study Australia Partnership.</p>	<p>Australian Government.</p>	<ul style="list-style-type: none"> List of government scholarships Scholarship search function by institution, field of study, destination state (via Good Education Group, a third party provider) Institution and course search function 	<p>Destinations in Australia are part of the site's main menu. An overview of the ten states of Australia is provided with course search available within each region and links to state websites.</p>

¹¹ <https://study-uk.britishcouncil.org/>

¹² <https://educationusa.state.gov/>

¹³ <https://www.studyinaustralia.gov.au/>

TABLE 4: COMPARISON OF NATIONAL STUDY CAMPAIGNS IN TOP ENGLISH-SPEAKING STUDY DESTINATIONS *continued*

COUNTRY	ABOUT	FUNDED BY	SITE FEATURES	REGIONAL INFORMATION
 CANADA Study campaign EduCanada ¹⁴	EduCanada is a brand that supports the international education offerings of Canada's provinces and territories. It is a collaboration between the provinces and territories through the Council of Ministers of Education, Canada (CMEC) and Global Affairs Canada.	Canadian Government through Global Affairs Canada (GAC) and the Council of Ministers of Education, Canada (CMEC).	<ul style="list-style-type: none"> List of featured scholarships Scholarship search function by nationality for government scholarships only Institution and course search function 	Provinces and territories are a subheading in 'Live and work' including links to the respective education websites.
 NEW ZEALAND Study campaign Study in New Zealand ¹⁵	Study in New Zealand is Education New Zealand's (ENZ) student-facing website designed to promote studying in New Zealand. ENZ is the Crown agency responsible for international education to benefit New Zealand socially, culturally and economically. It is funded by the New Zealand Government.	Government of New Zealand through the Ministry of Education.	<ul style="list-style-type: none"> Scholarship search function by nationality and subject Institution and course search function 	Destinations are listed and introduced with a brief overview within the subheading 'Explore NZ'. There is the option to see cities, regions, rental costs and airports on a map or search by lifestyle or subject area.

14 <https://www.educanada.ca/index.aspx?lang=eng>15 <https://www.studyinnewzealand.govt.nz/>**SOCIAL MEDIA FOLLOWERS**

Number of followers/subscribers as of 9 July 2021, rounded to the nearest 100.


































 f (577,100 followers)  (61,300 followers)  (22,600 followers) in (8,600 followers)  (16,100 subscribers)	 f (452,500 followers)  (86,100 followers)  (31,400 followers)  (21,500 subscribers) 	 f (326,000 followers)  (13,800 followers)  (5,800 followers) in (103,500 followers)  (1,870 subscribers)  Weibo  WeChat
 f (56,873 followers)  (7,000 subscribers)	 f (939,183 followers)  (38,700 followers)  (22,400 followers)  (16,700 subscribers)  Weibo  WeChat	

Table 5 shows that all countries require students to obtain a student visa or permit before entering their study destination. Canada, France and Malaysia offer faster and streamlined visa processes to selected nationalities. In terms of costs, the UK stands out, with its student visa being the most expensive, although it is closely followed by Australia. In addition, the UK's immigration health surcharge is comparatively more expensive than health cover in Australia or France. Other conditions for the student visa are significantly harder to capture and compare and have hence not been featured in detail in this table.

TABLE 5: COMPARISON OF STUDENT VISA REGULATIONS			
COUNTRY	STUDENT VISA	VISA COSTS	ADDITIONAL REQUIREMENTS
 UNITED KINGDOM	All international students who want to study in the UK are required to obtain a Student visa.	£348 to apply for a Student visa from outside the UK. £475 to extend or switch to a Student visa from inside the UK.	<ul style="list-style-type: none"> Financial requirement: £1,334 per month (for up to nine months) for courses in London £1,023 per month (for up to nine months) for courses outside London English language requirement Immigration Health Surcharge (IHS): £470 per year for a student
 UNITED STATES	Full-time students need the F-1 Visa (Academic Student) to enter the US. An interview is mandatory.	The visa application fee is US\$160 . The student and exchange visitor information system (SEVIS) fee is US\$200 .	<ul style="list-style-type: none"> Financial requirement English language requirement
 AUSTRALIA	International students need the Subclass 500 Student Visa to study in Australia.	From AU\$620 unless exempt.	<ul style="list-style-type: none"> Proof of sufficient funds English language requirement Overseas student health cover (OSHC) is AU\$500 for 12 months of singles cover
 CANADA	To study in Canada, students must apply for a study permit. The study permit is not a visa. When the study permit application is approved, a visitor visa or eTA is automatically issued. Students from China, India, Morocco, Pakistan, the Philippines, Senegal and Vietnam are eligible for faster processing via the Student Direct Stream.	The study permit costs CAN\$150 .	<ul style="list-style-type: none"> Proof of financial support English language requirement Health insurance (provincial or private)
 NEW ZEALAND	International students can obtain a Fee Paying Student Visa for a course longer than 3 months or a Pathway Student Visa which is valid for three consecutive courses for up to five years.	The Fee Paying Student Visa costs NZ\$330 .	<ul style="list-style-type: none"> Proof of sufficient funds English language requirement Health insurance (Doctoral students are exempt)

For exchange rates see [p85](#).

TABLE 5: COMPARISON OF STUDENT VISA REGULATIONS <i>continued</i>			
COUNTRY	STUDENT VISA	VISA COSTS	ADDITIONAL REQUIREMENTS
 FRANCE	A select number of countries is eligible for the Etudes en France (EEF) – procedure (online enrolment scheme) to apply for a long-stay student visa.	The visa cost for countries or territories with an EEF procedure is €50 ; the cost for other countries is €99 .	<ul style="list-style-type: none"> The student social security system is mandatory for non-EU students under 28 years (around €215 academic year).
 GERMANY	Most international students have to apply for a German National Visa (D Visa) – a long-term student visa or a student applicant visa if they have not yet been accepted by a university – to study in Germany. After they have entered Germany, international students also have to apply for a residence permit.	The visa fee is around €75 .	<ul style="list-style-type: none"> Proof of sufficient funds Records of previous study and language skills Proof of health insurance
 MALAYSIA	All international students need a valid student pass and visa to study in Malaysia. Once the student has been accepted into a Malaysian institution, the institution will submit the student pass application on the student's behalf (5–10 days). Upon arrival in Malaysia, students receive a student visa and the full student pass. Students from some countries (China, Myanmar, India, Sri Lanka, Nepal, Bangladesh, Pakistan, Bhutan, Serbia and Montenegro) can apply for an eVISA which takes 48 hours .	The student pass costs RM60 per year. The visa costs are dependent on the country of origin but do not exceed RM50 .	<ul style="list-style-type: none"> Proof of financial capability to meet course and other expenses Evidence of security and personal bond Health insurance package
 JAPAN	International students receive the visa application form from the university they applied to. The university will submit the form to the immigration authorities.	Fees must be paid for the issuance of visas. The fees are about ¥3,000 for a single-entry visa, or ¥6,000 for a double-entry or multiple-entry visa.	<ul style="list-style-type: none"> Letter of remittance A bank account balance certificate Proof of employment for student or their sponsor Written oath or pledge to pay the required costs
 CHINA	International students who come to China for their studies for six months or more need to apply for the student Visa (X-Visa). X-Visas are usually issued with a single-entry, valid for three months and no duration of stay. Within 30 days of arriving in China, students have to apply for a residence permit at a local public security bureau.	Fees range between £20 and £150 , depending on nationality and number of entries.	<ul style="list-style-type: none"> Physical Examination Record for Foreigners Language requirements (English or Mandarin)

For exchange rates see [p85](#).

Sources: GOV.UK, Student Visa (2021); Travel.State.Gov, Student Visa (2021); Australian Government, Student Visa (2021); Government of Canada, Study permit (2021); New Zealand Immigration, Information about Fee Paying Student Visa (2021); DAAD, Visas (2021); Immigration Department of Malaysia, Student Pass (2021); Ministry of Foreign Affairs of Japan, General Visa: Student (2021); Travel China Guide, China Student Visa (X) (2021).

COSTS AND FINANCIAL SUPPORT

Studying abroad is a significant financial commitment and many international students rely on scholarships or student loans. **Table 6** summarises tuition fees, living costs, scholarship availability and availability of loans across the study destinations. English-speaking countries, especially the US and the UK, are the most expensive study destinations in terms of tuition fees. China and France offer significantly cheaper programmes, while fees in Germany are almost negligible. When comparing cost of living, Japan, Australia and France lead the list, while China and Malaysia are the cheapest destinations. Most countries offer a wide range of scholarships, while international student loans are primarily available from private providers across all destinations.




TABLE 6: COMPARISON OF TUITION FEES, COST OF LIVING, SCHOLARSHIP AVAILABILITY AND LOANS FOR INTERNATIONAL STUDENTS

COUNTRY	TUITION FEES*	COST OF LIVING	SCHOLARSHIPS	LOANS
 UNITED KINGDOM	<p>UK universities do not have standardised tuition fees for overseas students. Annual tuition fees vary by type of course and by institution.</p> <p>Undergraduate degree £10,000 – 20,000</p> <p>Master's degree £10,000 – 20,000</p> <p>Doctoral degree £15,000 – 24,000</p>	<p>In the Cost of Living Index by country 2021, the UK ranks 28th out of 138 listed countries. Estimated monthly costs for a family of four are around £2,270 without rent. For a single person, estimated monthly costs are around £650 without rent.</p>	<ul style="list-style-type: none"> • Chevening Scholarship • GREAT Scholarships • Marshall Scholarships • Scotland's Saltire Scholarship • Global Wales Postgraduate Scholarship • Global Wales Fulbright Awards • New Chevening Scholarship • Commonwealth Scholarships • Provider scholarships 	<p>Student finance loans are not available to international students. Private loans are available via Future Finance.</p>
 UNITED STATES	<p>Annual tuition fees vary depending on the institution and the course.</p> <p>Undergraduate degree US\$12,000 – 40,000</p> <p>Master's degree US\$20,000 – 45,000</p> <p>Doctoral degree US\$28,000 – 55,000</p>	<p>In the Cost of Living Index 2021, the US ranks 27th out of 138 listed countries. Compared to the UK, US consumer prices are 1.4% higher (without rent); rents are 31.2% higher; restaurant prices are 5.6% lower; groceries prices are 23.8% higher.</p>	<ul style="list-style-type: none"> • Fulbright Foreign Student Scholarship Program • #YouAreWelcomeHere Scholarship • Provider scholarships 	<p>Federal student loans are not available to international students. Available options: Private student loan with a cosigner, international student loans without a cosigner, personal loans.</p>
 AUSTRALIA	<p>Annual tuition fees vary depending on the institution and the course.</p> <p>Undergraduate degree AUS\$20,000 – 45,000</p> <p>Master's degree AUS\$22,000 – 50,000</p> <p>Doctoral degree AUS\$18,000 – 42,000</p>	<p>In the Cost of Living Index 2021, Australia ranks 11th out of 138 listed countries. Compared to the UK, Australian consumer prices are 12.9% higher (without rent); rents are 15.5% higher; restaurant prices are 3.2% lower; groceries prices are 36.2% higher.</p>	<ul style="list-style-type: none"> • Australia Awards • Destination Australia (DAP) • Australian Government Research Training Program (RTP) • Provider scholarships 	<p>International students are not eligible for Higher Education Loan Program (HELP) but international students can get a university loan (short-term or emergency loans) or a loan from private banks (secured personal loan, unsecured loan, long-term or General Purpose Loan) in Australia.</p>

TABLE 6: COMPARISON OF TUITION FEES, COST OF LIVING, SCHOLARSHIP AVAILABILITY AND LOANS FOR INTERNATIONAL STUDENTS *continued*

COUNTRY	TUITION FEES*	COST OF LIVING	SCHOLARSHIPS	LOANS
 CANADA	Annual tuition fees vary depending on the institution and the course. Undergraduate degree CA\$13,000 – 20,000 Master's degree CA\$17,000 – 25,000 Doctoral degree CA\$7,000 – 15,000 MBA CA\$30,000 – 40,000	In the Cost of Living Index 2021, Canada ranks 30th out of 138 listed countries. Compared to the UK, Canadian consumer prices are 0.2% lower (without rent); rents are 5.2% higher; restaurant prices are 10.0% lower; groceries prices are 20.7% higher.	<ul style="list-style-type: none"> • Mostly short-term scholarships available • Vanier Canada Graduate Scholarship • Canada-CARICOM Virtual University Scholarship Program • Provider Scholarships 	International students are not eligible for Canada Student Loans and Grants. They can get a private student loan without a cosigner.
 NEW ZEALAND	Annual costs vary depending on the course: Undergraduate degree NZ\$20,500 – 25,000 Master's degree NZ\$19,000 – 29,000 Doctoral degree NZ\$6,500 – 9,000 MBA NZ\$31,000 – 50,000	In the Cost of Living Index 2021, New Zealand ranks 18th out of 138 listed countries. Compared to the UK, New Zealand consumer prices are 8.4% higher (without rent); rents are 8.9% higher; restaurant prices are 3.8% lower; groceries prices are 27.0% higher.	<ul style="list-style-type: none"> • New Zealand International Scholarships • New Zealand Commonwealth Scholarships • Provider Scholarships 	A few private banks give out loans to international students.
 FRANCE	The French government subsidizes higher education, hence the costs for students are relatively low. Annual registration fees for non-EU students: Licence (undergraduate) degree €2,770 Master's degree €3,770 Doctoral degrees €3,800	In the Cost of Living Index 2021, France ranks 15th out of 138 listed countries. Compared to the UK, French consumer prices are 10.9% higher (without rent); rents are 16.9% lower; restaurant prices are 0.2% higher; groceries prices are 33.7% higher.	<ul style="list-style-type: none"> • Eiffel Scholarship Program of Excellence • Maa'kum Programme for Lebanese students • Scholarships in Theology • Grants from the French Embassies in select countries • Chateaubriand Fellowships • Alexandre Yersin Scholarship • Needs-based grants from the French Ministry of Higher Education and Research 	Students loans are available for EEA citizens.
 GERMANY	There are generally no tuition fees for undergraduate and Master's degrees at public HEIs in Germany. Most Federal States only require an admin fee between €100 and €350 per semester. The Federal State of Baden-Württemberg charges non-EU citizens €1,500 per semester for undergraduate and Master's programmes. The fee does not apply to doctoral degrees. For a second degree, students pay €650 per semester.	In the Cost of Living Index 2021, Germany ranks 29th out of 138 listed countries. Compared to the UK, German consumer prices are 3.1% lower (without rent); rents are 9.1% lower; restaurant prices are 15.3% lower; groceries prices are 6.1% lower.	<ul style="list-style-type: none"> • DAAD Scholarship Program • Heinrich Böll Foundation Scholarships in Germany • Deutschlandstipendium National Scholarship Programme • Konrad-Adenauer-Stiftung Scholarships in Germany for International Students • The Friedrich Ebert Stiftung Scholarship 	KfW-Studienkredit BAföG loans Bildungsfonds (subject-specific loans) private bank loans.

TABLE 6: COMPARISON OF TUITION FEES, COST OF LIVING, SCHOLARSHIP AVAILABILITY AND LOANS FOR INTERNATIONAL STUDENTS *continued*

COUNTRY	TUITION FEES*	COST OF LIVING	SCHOLARSHIPS	LOANS
 MALAYSIA	Annual tuitions fees at public universities in Malaysia vary: Undergraduate degree US\$9,600 – 14,000 Master's degree US\$7,500 – 12,700 Doctoral degree US\$4,000 – 6,000	In the Cost of Living Index 2021, Malaysia ranks 90th out of 138 listed countries. Compared to the UK, Malaysian consumer prices are 47.3% lower (without rent); rents are 68.6% lower; restaurant prices are 72.2% lower; groceries prices are 32.4% lower.	<ul style="list-style-type: none"> Malaysia International Scholarship (MIS) Provider scholarships 	Student loans are primarily available for Malaysian nationals.
 JAPAN	Annual tuition fees vary according to national or local public universities: Undergraduate degree US\$7,200 – 8,200 Master's degree US\$7,200 – 8,000 Doctoral degree US\$7,200 – 8,000	In the Cost of Living Index 2021, Japan ranks 7th out of 138 listed countries. Compared to the UK, Japanese consumer prices are 17.5% higher (without rent); rents are 13.5% lower; restaurant prices are 34.4% lower; groceries prices are 50.3% higher.	<ul style="list-style-type: none"> Japanese Government (MEXT) Scholarships JASSO Scholarships Reservation Program for Monbukagakusho Honors Scholarship for privately financed students Local government and local international association scholarships Provider scholarships 	Only Japanese students and permanent residents of Japan are eligible for JASSO student loans.
 CHINA	Annual tuition fees for an undergraduate degree in China are around £1,320 – 2,400	In the Cost of Living Index 2021, China ranks 76th out of 138 listed countries. Compared to the UK, Chinese consumer prices are 41.0% lower (without rent); rents are 49.0% lower; restaurant prices are 63.5% lower; groceries prices are 2.6% lower.	<ul style="list-style-type: none"> Chinese Government Scholarships Chinese Local Government Scholarships Chinese university scholarship program Great Wall Program EU Window Program AUN Program (ASEAN University Network) 	Student loans are primarily available for Chinese nationals.

* Please note that all costs are indicative, certain courses may be more expensive and fees may change over time.

The list of scholarships and loans is not intended to be exhaustive.

Sources: IDP Pakistan, Cost of Study in UK and University Tuition Fees for International Students (2021); IDP Pakistan, Education System in USA (2021); Study Australia, Education and Living Costs in Australia (2021); IDP India, How much will it cost to study in Canada (2021); IDP India, Cost of Studying in New Zealand (2021); Campus France, Tuition fees in France (2021); DAAD, Cost of education and living (2021); Education Malaysia, Fees and Costs (2021); Study in Japan, Academic fees (2021); THE Student, The cost of studying at a university in China (2021); Numbeo, Cost of Living (21 July 2021).

EMPLOYMENT RIGHTS AND POST-STUDY WORK RIGHTS

Employment rights during and after studying as well as routes to permanent residency are complex and often difficult to summarise. **Table 7** provides an overview of the key regulations in the selected countries and shows that in terms of employment rights during the degree, the UK has broadly similar rules to most other countries. China only allows international students in Beijing and Shanghai to work part-time. In terms of post-study work rights, the UK has become much more competitive since the new Graduate route was launched in July 2021. ‘The new Graduate route broadly offers similar opportunities to other English-speaking destinations for international students to stay and work in the UK for a limited number of years after graduation. However, routes to permanent residency vary significantly. Canada, New Zealand and Australia stand out with their offer to international students to count some of their study period towards gaining permanent residency rights.

TABLE 7: COMPARISON OF INTERNATIONAL STUDENTS’ EMPLOYMENT RIGHTS, POST-STUDY WORK RIGHTS AND ROUTE TO PERMANENT RESIDENCY





COUNTRY	EMPLOYMENT RIGHTS	POST-STUDY WORK RIGHTS	ROUTE TO PERMANENT RESIDENCY
 UNITED KINGDOM	Students following a full-time course at degree level or above study can work 20 hours per week during term-time. Full-time employment is permitted outside of term-time.	The new Graduate route allows international students to stay in the UK to look for work and work for a period of two years or three years for Doctoral-level qualifications.	Tier 2 (General) visa or Skilled Worker visa holders can apply for indefinite leave to remain (ILR) in the UK if they have been living and working in the UK for five years and spent no more than 180 days outside the UK in any 12 months . The post-study work (PSW) visa will not lead to ILR in the UK: PSW visa holders must switch to an immigration route that will lead to ILR, e.g., a Skilled Worker visa.
 UNITED STATES	Student visa (F-1) holders may work for up to 20 hours per week during term time, and 40 hours during holidays. In the first year this work must take place on campus; in the second year the student may work off campus, e.g., curricular practical training, optional practical training.	Optional Practical Training (OPT) is temporary employment that is directly related to an F-1 student’s major area of study. Eligible students can apply to receive up to 12 months of OPT authorization before or after completing their academic studies. Graduates of a degree in certain STEM fields, may apply for a 24-month extension of the post-completion OPT employment authorization.	International students must transfer to an immigration route that will lead to a Green Card.
 AUSTRALIA	Once the course has started, student visa holders can work up to 40 hours per fortnight during term time and unlimited hours during breaks. Research students can work unlimited hours.	The Post-Study Work stream allows students to stay in Australia for between two and four years after graduation.	International students can become permanent residents by submitting an expression of interest through the SkillSelect program. Skills will be assessed in a points test and, if qualified (at least 65 points), they will be invited to apply for a PR visa.
 CANADA	Once the programme has started, a full-time student with a valid study permit in a programme that is longer than six months can work unlimited hours on campus, and can work off campus 20 hours per week during term-time and unlimited hours during breaks.	The Post-Graduation Work Permit (PGWP) allows eligible graduates (at least an eight-month full-time training programme completed with degree, diploma or certificate) to work in Canada for up to three years. The PGWP cannot be valid for longer than the study programme.	Individuals must have been physically present in Canada for a minimum of 730 days within the past five years.

TABLE 7: COMPARISON OF INTERNATIONAL STUDENTS' EMPLOYMENT RIGHTS, POST-STUDY WORK RIGHTS AND ROUTE TO PERMANENT RESIDENCY *continued*







COUNTRY	EMPLOYMENT RIGHTS	POST-STUDY WORK RIGHTS	ROUTE TO PERMANENT RESIDENCY
 NEW ZEALAND	<p>Students on a full-time course that is at least two academic years in duration are allowed to work up to 20 hours a week.</p> <p>Students who are studying full-time for at least one academic year on a course that is worth at least 120 credits and delivered over a period of at least eight months are allowed to work full-time during scheduled breaks. There are no restrictions on the hours of work for students on a Master's by Research or doctoral programme.</p>	With a Bachelor's degree or higher, graduates can apply for a post-study work visa for three years.	To obtain a Permanent Resident Visa, the applicant must have held a resident visa (e.g., Fee Paying Student Visa) in the last three months and been living in New Zealand for at least 24 months at the time of application.
 FRANCE	All foreign students have the right to work while studying in France. French law authorises foreign students to work up to 964 hours during the year, the equivalent of 60% of the legal work year. This can only be auxiliary income.	To stay in France after graduation, non-EU students must have a promise of employment or a work contract and be paid at least one-and-a-half times the minimum wage. Without the promise of employment, a foreign, non-European graduate may request an Autorisation Provisoire de Séjour (APS – temporary resident permit) valid for twelve months and non-renewable, while they seek employment in France.	Individuals who have been living in France for more than five years may be eligible for permanent residency and a 10-year renewable residency permit.
 GERMANY	As of August 2012 international students who do not come from the EU or EEA are allowed to work 120 full days or 240 half days in a year. They do not need authorisation from the Employment Agency, i.e., the German authorities. International students cannot be self-employed or freelance.	Students from new EU member states and all other international students can extend their residence for a further 18 months to look for a job provided they have completed their studies successfully. If a graduate finds a suitable position, their previous residence permit can be converted to a temporary residence permit for the purpose of employment. After five years of working students can receive a permanent residence permit.	Individuals must have held a (temporary) residence permit for at least five years, have an adequate command of the German language, pension provision.
 MALAYSIA	International students studying at public or private higher education institutions are allowed to work part-time for a maximum of 20 hours per week during semester breaks or holidays of more than seven days, for as long as their student passes remain valid. Prior approval from the Department of Immigration is required.	International students can apply for an employment pass for skilled workers, lasting two to five years. A temporary employment pass is available for lower-paying jobs and contracts under two years. A visitor pass (professional) is available for specific fields for up to 12 months.	Professionals on a long-term work visa may be eligible for permanent residency through a points-based system that assesses their qualifications, achievements, age, language, skills, length of stay, etc. At least 65 out of 120 points are required to submit an application.

TABLE 7: COMPARISON OF INTERNATIONAL STUDENTS' EMPLOYMENT RIGHTS, POST-STUDY WORK RIGHTS AND ROUTE TO PERMANENT RESIDENCY *continued*

COUNTRY	EMPLOYMENT RIGHTS	POST-STUDY WORK RIGHTS	ROUTE TO PERMANENT RESIDENCY
 JAPAN	International students can work up to 28 hours per week and up to eight hours per day during the long holidays.	After graduation, international students who have a job offer can apply for a Highly Skilled Professional visa or a work visa for specific professions.	Japan introduced a points-based system for expediting permanent residence for highly skilled applicants based on their qualifications, achievements and position. With 70 points, permanent residence can be acquired after three years; with 80 points, after one year.
 CHINA	International students in Beijing and Shanghai are allowed to take part-time jobs or internships off campus if they have approval from their academic institution.	International students with a Master's degree or higher from a Chinese university or a well-known university overseas can apply for a work visa within 12 months of graduation.	If you have worked in Beijing for at least four consecutive years and resided in China for at least six months each year, with an annual salary income of CNY1,500,000 or above for four consecutive years, then you may apply for a permanent residence permit.

Sources: GOV.UK, Immigration Rules (2021); GOV.UK, The Graduate route: information for international students (2021); GOV.UK, Live permanently in the UK (2021); US ICE, Employment (2021); US ICE, Optional Practical Training (OPT) (2021); US ICE, Green Card (2021); Australian Government, Check visa details and conditions (2021); Australian Government, Post-Study Work stream (2021); Australian Government, Skillsselect (2021); Government of Canada, Studying and working in Canada as an international student (2021); Government of Canada, Work or live in Canada after you graduate (2021); Government of Canada, Applying for a Permanent Resident Card (PR Card) (2021); New Zealand Immigration, Working on a student visa (2021); New Zealand Immigration, Information about: Post-study work visa (2021); New Zealand Immigration, Meeting the criteria: Permanent Resident Visa (2021); Campus France, Working while studying in France (2021); Campus France, How to find work in France (2021); Expatica, A guide to French visas and permits (2021); Deutsches Studentenwerk, Information for international Students: Jobbing (2021); Deutsches Studentenwerk, Information for international Students: Staying in Germany (2021); Berlin Landesamt für Einwanderung, Permanent settlement permit (general) (2021); Education Malaysia, Studying in Malaysia (2021); ESD, Employment Pass (2021); VisaGuide.world, Malaysia Entry Pass – Malaysia Permanent Residence Permit (2021); Study in Japan, Part-time work (2021); Ministry of Foreign Affairs of Japan, Work or Long-term stay (2021); The Independent, It just got easier to become a permanent resident of Japan – here's how you do it (2018); The Pie News, China to allow international students work part-time (2018); The Pie News, China eases post-study work for foreign graduates (2017); The People's Government of Beijing Municipality, Instructions on Application for Permanent Residence Permit for Foreigners (2021).

CONCLUSION

The comparison of policies relating to international students in the UK and its key competitors shows that overall, the UK provides an attractive environment for international students and its offer is broadly comparable to other study destinations. However, the UK is comparably more expensive in terms of tuition fees, student visas and the health surcharge than a number of other study destinations. Additionally, the UK's Graduate route offers slightly fewer benefits than other English-speaking study destinations in terms of length of stay or routes to permanent residency.

This suggests that there are several areas where the UK could develop an additional competitive advantage:

- ➔ **National study campaign:** The UK's national study campaign could become more effective by featuring the UK's nations more prominently and providing a more detailed overview of them. Additionally, a scholarship portal that filters scholarships by subject area and nationality could make the range of opportunities for financial support more accessible.
- ➔ **Student visa costs:** The UK could become more competitive by bringing its visa costs in line with international competitors.
- ➔ **Scholarships:** The UK could consider expanding its scholarship offer through reviewing its geographical coverage following the change in fee and loan status of EU students and working with governments of emerging economies to co-fund postgraduate scholarships in relevant subject areas.
- ➔ **International student loans:** The UK government could work with finance providers to develop accessible international student finance options to increase the affordability of study.
- ➔ **Post-study work visa:** The new Graduate route has significantly improved the UK's competitiveness. It is important to maintain and further promote this offer. If, in the future, there is the desire to further improve the Graduate route, the UK could consider extending its duration and counting part of it towards indefinite leave to remain, as Canada and New Zealand do.

CHAPTER 2

COUNTRY ANALYSIS – WHY AREN'T WE SECOND?

The following analysis of eight of the world's top sending countries and territories builds on the above comparison of study destinations' recruitment strategies and policies. It examines which of these factors matter the most and why when students select a study destination.

Each country analysis has two sections. The first section provides an overview of the macro-environment, national development plans and higher education. The second section presents the results of the qualitative data collection, analysing why students from the specific country choose to study abroad, which factors influence this decision and how the UK could become more attractive (see [Appendix A](#) for methodology and limitations).



2

MARKETS WHERE THE UK SHOULD MAINTAIN ITS POSITION

The UK ranks second in Nigeria and Saudi Arabia; however, it does not hold a comfortable lead over competitors and its market share has been decreasing in recent years. The following two country analyses explore why the UK ranks second and how it can increase its market share to maintain its position in these countries.



NIGERIA

OVERVIEW

The Federal Republic of Nigeria is located in West Africa and, at over 200 million people, boasts the seventh largest population in the world. It is projected that Nigeria will become the world's third most populous country by 2050.⁴⁶ Nigeria is a very young nation, with more than 40% of the population under the age of 14.⁴⁷

Besides being Africa's most populous country, Nigeria also represents Africa's largest economy – its GDP in 2020 was US\$432.9 billion. However, exports are dominated by oil, which has created a volatile economy, and infrastructure deficiencies have rendered the non-oil export base largely uncompetitive.⁴⁸

The security situation has deteriorated dramatically over the past decade and the government is struggling to end insecurity in various parts of the country. Problems are often compounded by a lack of employment opportunities and underlying poverty. Nigeria ranks 157 in the United Nations Human Development Index,⁴⁹ with an adult literacy rate of 51.0% and a gross enrolment ratio in tertiary education of just 10.1% in 2011.⁵⁰

Africa's largest economy

US\$432bn

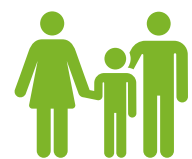
GDP in 2020



Population of over

200m

in 2020



NATIONAL DEVELOPMENT STRATEGY

Nigeria's national economic priorities are set out in medium- and long-term national plans. The Medium-Term National Development Plan (MTNDP) 2021–2025 states five policy priorities: business growth, entrepreneurship and industrialisation; access to quality education, healthcare and productivity; social inclusion and reduction of poverty; fighting corruption, improving governance and creating national cohesion and improving security.

Priority sectors include agriculture, food security, manufacturing and industrialisation, oil and gas, culture, tourism, creative industries, renewable energy, urban development, transportation, ICT, water and sanitation, disaster management, education and health.⁵¹

HIGHER EDUCATION

The current national development plan recognises the need to address skills shortages in key economic areas and support the development of a knowledge-based economy. The education system faces many challenges, especially issues of access and funding, with numbers of applicants for university far outstripping places. Priorities for education and human capital development within the strategy therefore include skills development through investment in science, technology, engineering and mathematics (STEM), technical and vocational education and training (TVET), improving the quality of education, securing sustainable financing sources to increase funding to the education sector, and improving digital literacy proficiency.⁵²

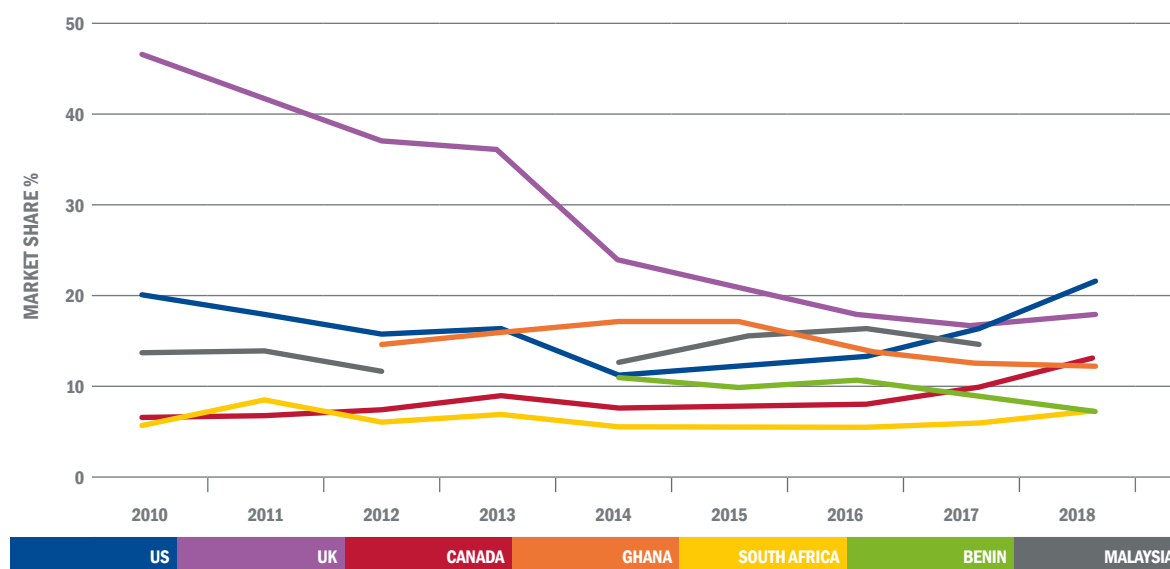
WHY DO NIGERIAN STUDENTS CHOOSE TO STUDY ABROAD?

According to UNESCO data, in 2018, **76,338** Nigerian students were internationally mobile.

Figure 3 shows that the top three study destinations that year were the US, the UK and Canada.⁵³

For the first time in over a decade, the UK was ranked second. In 2010 the UK's market share was as high as **46.5%**, but since then it has dropped steadily, while the US and Canada have gained in popularity.

FIGURE 3: MARKET SHARE CHANGES IN NIGERIA (2010–2018), BY 2018 RANK

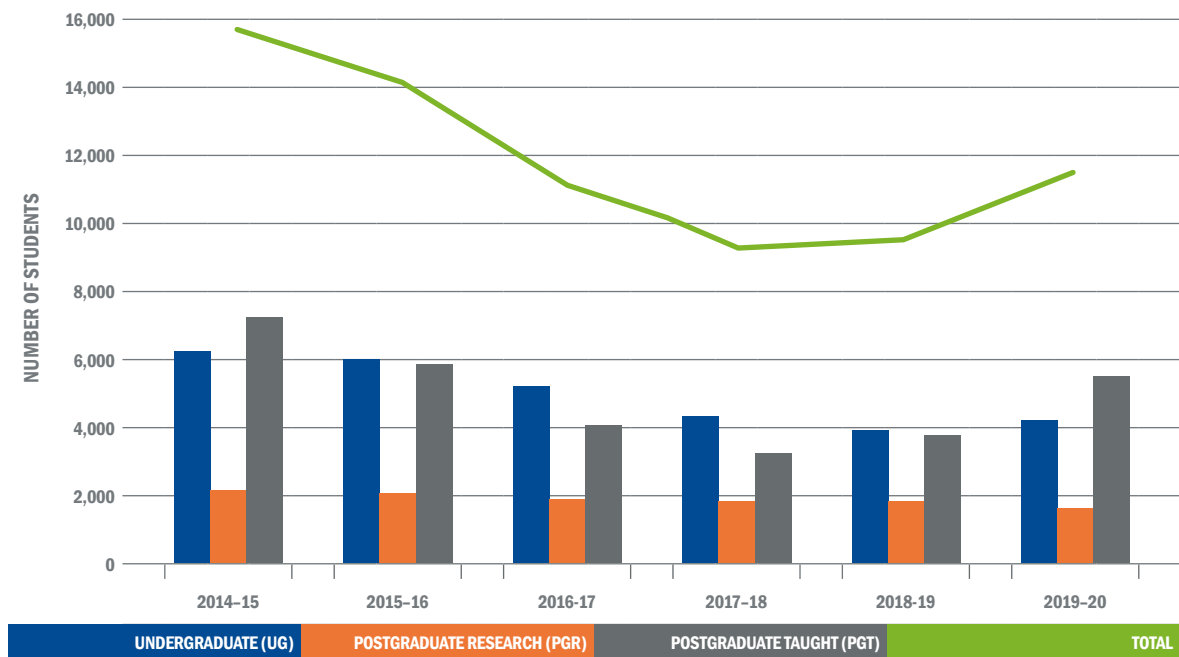


Data source: UIS.Stat, June 2021

WHY DO NIGERIAN STUDENTS CHOOSE TO STUDY ABROAD?

Figure 4 shows the number of Nigerian students in the UK from 2014–15 to 2019–20. In 2019–20, the top three subject areas for Nigerian students in the UK were business and management, engineering and technology, and subjects allied to medicine. That same year, most Nigerian postgraduate students in the UK (**65.1%**) had no award or financial backing to cover their tuition fees and only **10.1%** used 'other overseas sources' to pay for their tuition fees. Among Nigerian undergraduate students in the UK, **88.6%** had no award or financial backing for their tuition fees and **4.1%** had a provider waiver or award for their tuition fees.⁵⁴

FIGURE 4: NUMBER OF FULL-TIME NIGERIAN STUDENTS IN THE UK (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

Interviews with recruitment agents revealed that many Nigerian students study abroad because of the socio-economic situation in their country, and parents hope that an overseas degree will provide their children with more and better opportunities and hence **a better life**.

Specifically, alumni reported through interviews that the **quality of education at home is regarded as low and insufficient** to prepare graduates for today's jobs. For example, it is difficult to change careers or build skills through an additional postgraduate degree, so 'going abroad is to get that knowledge that you believe you can't find in Nigeria or is not enough' (PG student from Nigeria⁵⁵).

“ I studied for an MSc in Human Resource Management [in the UK], but I studied Philosophy in Nigeria. It was impossible to work in management or do a Master's in management. [Studying abroad] helped me to diversify my educational career and my skills. I can now work in both spheres.”

PG student from Nigeria

Additionally, interviewees hoped that a degree from a globally recognised university, international exposure and potential work experience would provide them with skills that increase their employability and help their careers.

“The principal push factor is that education systems abroad are considered of better quality. The standard is not getting better at home. Our parents had better education than what we have. A lot of parents do not have hope in Nigeria. Also, they do not see that the government is trying to improve the situation. It is quite expensive to send your kid to private school in Nigeria. If parents spend that much and they don't get what is expected – international exposure, [a qualification that is] competitive outside of Nigeria – they will send their kids abroad. If you are not competitive with peers from abroad, education at home is not worth it.”

Recruitment agent in Nigeria

WHAT IS IMPORTANT TO NIGERIAN STUDENTS WHEN CHOOSING A STUDY DESTINATION?

All interviewees said that the biggest challenge for Nigerian students is **funding**. Due to the exchange rate, studying abroad is very expensive, so students look for fully or partially funded scholarships and destinations that offer high-quality degrees at lower fee levels.

Another important consideration is the availability of **post-study work options** or even permanent residency, because overseas work experience can boost Nigerian students' employment options back home and it is a way to earn back the money spent on the degree. Additionally, there is a 'culture that if parents sponsor their children at university, the children then in turn take care of their aging parents' (recruitment agent in Nigeria). Preference is therefore given to destinations that have an attractive post-study work offer:

“My son is 14 and we are looking at options for him. There have been so many changes in immigration laws. It wasn't difficult for me, because it was just about quality education and a universally recognised certificate. My son, however, has to get a job after he graduates, and I don't know how possible this is in the UK.”

PG student from Nigeria

Quality of education matters too, and 'for Nigerians, quality means better than at home' (recruitment agent in Nigeria). The study destination is hence often selected based on a combination of affordability and quality. One recruitment agent reflected, however, that middle- and upper-class parents strongly rely on **university rankings** and, if they can afford it, they send their children to the highest-ranking institution irrespective of the country.

WHY ARE WE SECOND IN NIGERIA?

In 2018, the UK was the second most popular study destination for Nigerian students and had a market share of **16.7%**. However, these positive figures represent a fall in favour compared to previous years: until 2018, the UK was the top destination, and its market share has fallen substantially since 2010 (see **Figure 3**). For interviewees, **the UK** is a popular study destination because of its excellent universities. Additionally, interviewees mentioned that the UK's historical connection with Nigeria, a similar education system, and familiarity with the overall processes have a positive effect on choosing the UK. For some alumni, the possibility of a one-year postgraduate degree and its relative geographical proximity compared to other top English-speaking destination made the UK attractive.

“*The quality of education in the UK – no brainer. The UK is a top-quality country. I wasn’t concerned. I knew I was going where there is a culture of science, reason, research. I was happy to come and learn here.*”

PG student from Nigeria

However, the US has now become more popular; in 2018, the US ranked first, with a market share of **20.3%**. According to a recruitment agent, the quality of education overall, the reputation of the Ivy League universities and family ties are compelling factors driving Nigerian students to the US. The new US presidency is also making Nigerians more confident to go there.

Recruitment agents also reflected that the abolition of the post-study work visa in the UK diverted many Nigerian students’ interest towards Canada, which, with a market share of **11.3%**, ranked third in 2018. According to interviewees, Canada ‘is cost-effective – tuition fees are relatively low, the exchange rate is relatively low’ (recruitment agent in Nigeria), and the post-study work route is longer. Most recruitment agents see it as the most attractive study destination now, as it is easier to obtain permanent residency.

HOW CAN THE UK MAINTAIN ITS POSITION IN NIGERIA?

The by far most mentioned recommendation to improve the UK’s attractiveness as a study destination was **financial support**: recruitment agents and alumni suggested greater numbers of fully and partially funded scholarships. Respondents had mixed views on student loans, but they would make it easier for many Nigerians to study in the UK, especially if they had the opportunity to stay and work in the UK for a few years after graduation. Another suggestion was payment plans for tuition fees, as bulk payments are difficult for most families.

Interviews showed that post-study work options are an influential factor in Nigerian students’ decisions and that alumni and prospective students miss this opportunity in the UK. Many respondents proposed more work opportunities for graduates, which suggests that increased **promotion of the Graduate route** would be valuable. Additionally, recruitment agents emphasised that it is essential for the UK to demonstrate that the Graduate route will remain an integral part of the UK’s offer as a study destination in the future.

“*Now, in 2021, studying in the UK as an opportunity must be rebranded. The government in Canada gives you a two-year work permit which is very helpful and makes a difference. The citizenship permit is the window that students use. Why are Nigerians not interested in the UK? Previously, you had the opportunity to stay and work for two years after graduation. Now, you are not allowed. The UK sector has to make them see what is in it for them, that’s it, it’s simple. If migration is still an opportunity, it has to be visible and must be communicated to the audience.*”

Recruitment agent in Nigeria

Another suggestion was the **removal of English language requirements** for Nigerians, as it adds to the already very high costs of studying abroad and makes Nigerians feel ‘unwanted’ (recruitment agent in Nigeria). English is an official language and mandatory from the first grade at school. Nigeria ranks third in Africa, according to the EF English Proficiency Index, and is counted among countries with moderate proficiency globally.⁵⁶

Finally, interviewees suggested **engaging more alumni** in the recruitment process, as former students can talk to prospective ones about their experiences, student support, scholarships and employment opportunities, complementing the work of recruitment agents.


 A world map with Saudi Arabia highlighted in red. The map is centered on the Middle East region.

SAUDI ARABIA

MAINTAIN

OVERVIEW

The Kingdom of Saudi Arabia is the largest country in the Gulf region, with a population of 35 million, of which non-Saudi nationals make up 37%. It is a young nation, as more than 40% of its population are aged between 0 and 24 years. As a leading producer of oil and natural gas, Saudi Arabia has the largest economy in the Middle East, with a GDP of US\$700,118.⁵⁷

However, low global oil prices throughout 2015 and 2016 significantly reduced Saudi Arabia's governmental revenue. In response, the government cut subsidies on water, electricity and gasoline; reduced government employee compensation packages; announced limited new land taxes; and implemented value added tax (VAT) in 2018.⁵⁸

The Covid-19 pandemic, in addition to declining oil prices, further tightened the Kingdom's budget and its economy shrank by 4.1% in 2020 – the sharpest contraction in over three decades.⁵⁹ Resulting austerity measures to support the economy included the suspension of the cost-of-living allowance and an increase of VAT from 5% to 15% in July 2020.⁶⁰

Largest economy in the Middle East

US\$700bn

GDP in 2020



Population of over

35m

in 2020



SAUDI VISION 2030

As a result of lower global oil prices, the government enhanced its efforts to pursue economic reform and diversification, as well as to promote foreign investment. In 2016, it announced wide-ranging socio-economic reforms, known as Vision 2030, to progress the country's transition towards a knowledge-based economy driven by the private sector as the main engine for economic growth and job creation.

The Saudi Vision 2030 is based on three pillars that aim to:

- 1. enhance** government effectiveness and enable social responsibility,
- 2. grow and diversify** the economy and increase employment, and
- 3. strengthen** Islamic and national identity and offer a fulfilling and healthy life.⁶¹

Important growth sectors include chemicals, information technology, (renewable) energy and water, industrial and manufacturing, healthcare and life sciences, mining and metals, transport and logistics, tourism and entertainment, and real estate.⁶²

HIGHER EDUCATION

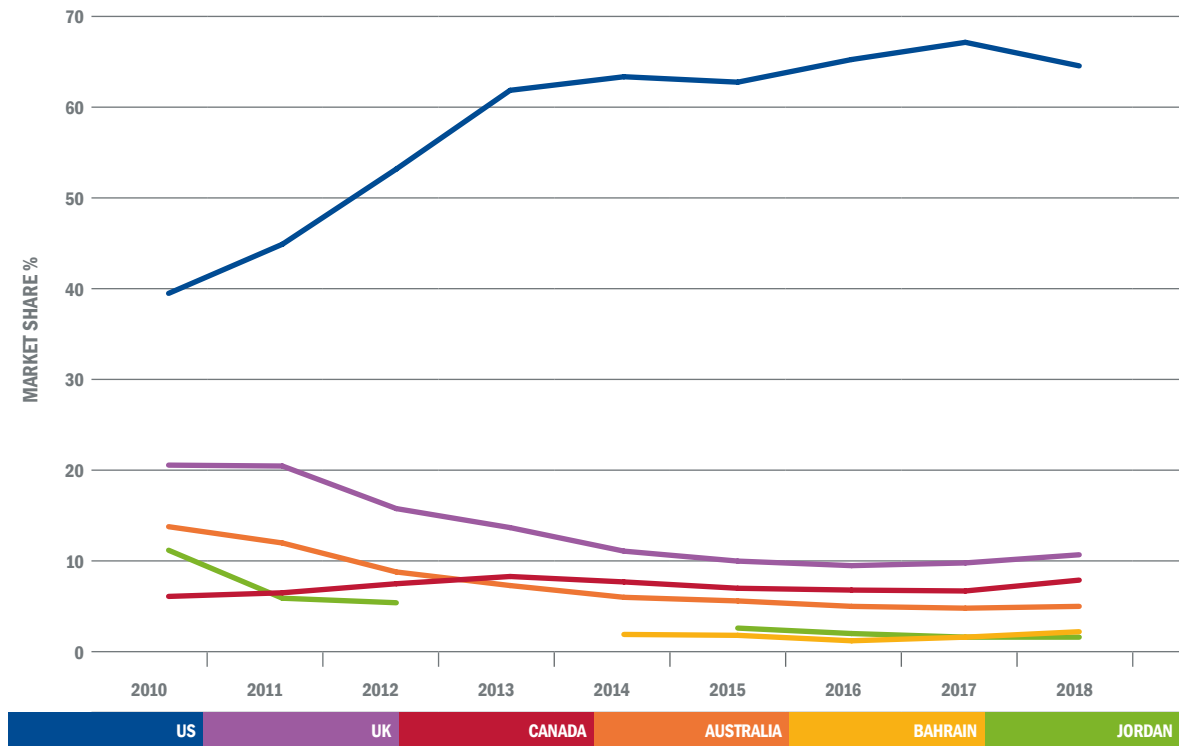
In 2019, Saudi Arabia's gross enrolment ratio for tertiary education was 71%.⁶³ Education and professional training to drive productivity, entrepreneurship, innovation and technical progress are central to Vision 2030, in order to achieve the transformation to a knowledge-based economy. Developing higher education at home is therefore a top priority. Objectives include improving the ranking of higher education institutions, building lifelong learning, aligning educational outputs with labour market needs, expanding vocational training, improving graduates' labour market readiness, and fostering an innovation and entrepreneurship culture.⁶⁴

In addition, the government continues to support Saudi nationals to study abroad in order to develop professionally and personally and hence raise academic and societal standards in Saudi Arabia upon their return. The Custodian of The Two Holy Mosques Scholarship Program⁶⁵ was initially launched in 2005 and is the third largest government-initiated scholarship in the world after China's and India's. However, following the decrease in crude oil prices and ensuing budget constraints, the Saudi government scaled back the programme in 2016: scholarship numbers have decreased and the rules for admission have become tighter. This is reflected in the recommended universities list, which is relevant both for government-sponsored and self-funded students.⁶⁶ Only degrees awarded by universities on this list will be recognized by the Saudi Ministry of Education and hence also employers. Additionally, subject-specific programmes have emerged to support the country's economic development strategy, for example, in AI, cybersecurity, air transport, health and culture.⁶⁷

WHY DO SAUDI STUDENTS CHOOSE TO STUDY ABROAD?

Due to the decline in available government scholarships, Saudi Arabia's outbound mobility ratio has dropped from a steady **5.6%** of Saudi Arabian students enrolled in tertiary education pre-2016 to **4.8%** (**77,406** students) in 2018.⁶⁸ That year, 64.6% of the outbound students from Saudi Arabia went to study in the US, **10.6%** studied in the UK and **7.8%** studied in Canada (**Figure 5**).

FIGURE 5: MARKET SHARE CHANGES IN SAUDI ARABIA (2010–2018), BY 2018 RANK

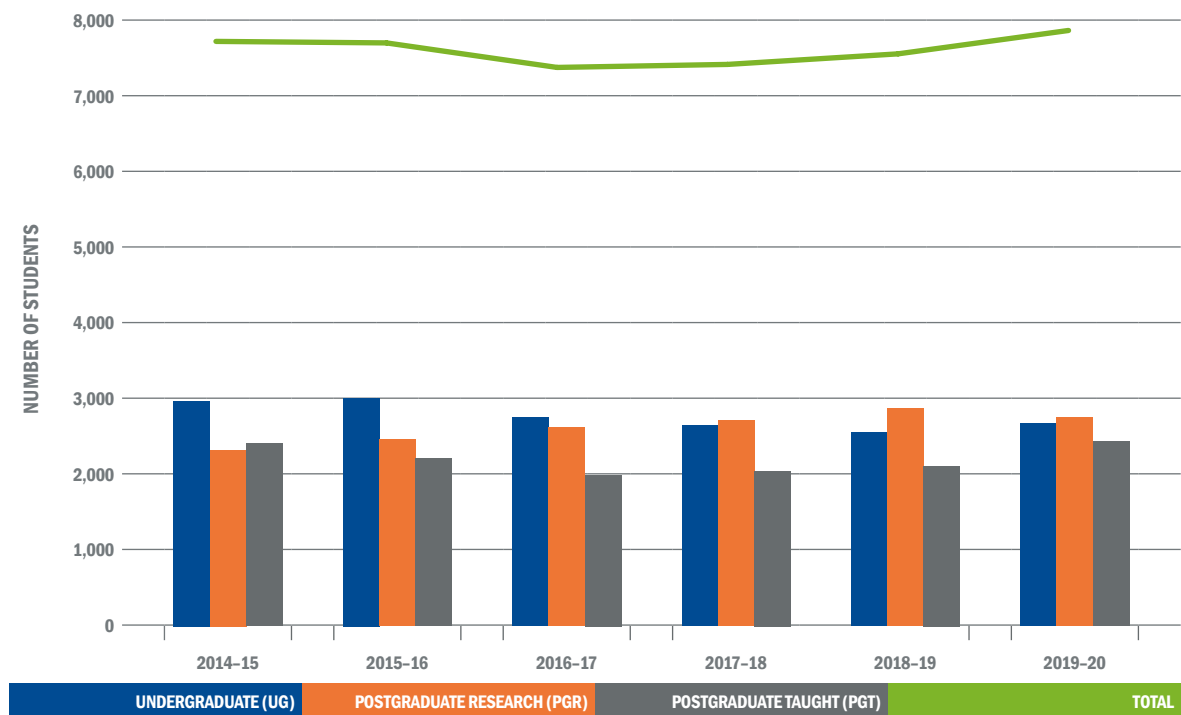


Data source: UIS.Stat, June 2021

WHY DO SAUDI STUDENTS CHOOSE TO STUDY ABROAD?

Figure 6 shows the development of Saudi student numbers in the UK from 2014–15 to 2019–20. In 2019–20, the top three subject areas for Saudi students in the UK were engineering and technology, business and management, and subjects allied to medicine. A total of **60.5%** of Saudi postgraduate students and **48.1%** of Saudi undergraduate students had their tuition fees covered by ‘other overseas sources’, while **27.7%** of postgraduates and **38.4%** of undergraduates had no award or financial backing.⁶⁹

FIGURE 6: NUMBER OF FULL-TIME SAUDI STUDENTS IN THE UK (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

According to interviewees, Saudi nationals choose to study abroad because the quality of education is perceived to be better than at home, and overseas universities' rankings and reputations make a degree from abroad highly regarded in Saudi Arabia. Additionally, degree options in Saudi Arabia are limited and access to postgraduate degrees at public universities can involve long waits, which makes studying overseas attractive.

Some interviewees also mentioned that studying abroad is an opportunity for personal development. For instance, young people in Saudi Arabia tend to live with their parents until they start their own family; studying abroad, however, enables them to become independent from their parents much earlier.

“ I wanted to get the opportunity to live by myself, be responsible for myself and become independent from my parents. When you go abroad you have to pay your own bills, buy your food and develop household skills like cleaning, cooking and so on.”

UG student from Saudi Arabia

Additionally, several interviewees said that studying abroad gives them the chance to **broaden their horizons** by immersing themselves in a new culture, gaining valuable experiences in a new and unfamiliar country and 'learning to look at things from a different perspective' (PhD student from Saudi Arabia).

Ultimately, interviewees expected to improve their **employment opportunities** with a degree from abroad, as it not only equips them with the required academic and professional skills, but also the personal experiences to compete in the job market.

“*It is prestigious if you get your Master's degree from abroad and I assumed that it would give me better employment opportunities.*”

PG student from Saudi Arabia

WHAT IS IMPORTANT TO SAUDI STUDENTS WHEN CHOOSING A STUDY DESTINATION?

Overall, interviewees found the process of selecting a study destination quite straightforward. Even though English is mandatory from grade 6 (intermediate school), and in private schools it may be taught from grade 1 (elementary school), Saudi Arabia ranks 'very low' – 97th out of 100 countries/regions – on the EF English Proficiency Index.⁷⁰ So, in the first instance most students rule out non-English speaking countries because part of the experience is to improve your English. Additionally, students often already have an idea of their personal preferences in terms of the effort they want to put into the application, degree duration or geographical proximity to home. Also, financial concerns are mostly limited for Saudi national students because, despite budget constraints, generous government scholarship programmes are still widely available.

However, a key factor Saudi students consider is **how welcoming the country is and whether they will feel safe**. Interviews showed that students – with and without family – are worried about being discriminated against, for instance during the visa application process, when entering the country or while living there.

“*I think my biggest concern was safety. I wanted to make sure they wouldn't discriminate against me because of my skin colour or culture.*”

PhD student from Saudi Arabia

Additionally, many alumni stressed that academic excellence mattered, and that it was less about the country than the university's ranking and reputation, as the quality of English-speaking study destinations is perceived to be similar.

“*I don't think it is about the country. I think it is about the school itself. You find good and bad schools in all countries. You shouldn't judge a graduate by the country that they went to but the school.*”

PG students from Saudi Arabia

Excellence is also important, as returning graduates – sponsored and self-funded – must have their degree certificate verified by the government in order to find employment. All interviewees stated that the ultimate influencing factor for selecting an institution is therefore the **government's list of recommended universities**.

“ For Saudi students it is primarily about excellence, it is about which universities and courses are approved under a certain scholarship.”

Recruitment agent in Saudi Arabia

“ I was self-funded, so I could have studied anywhere I wanted. But when I returned, I wanted to find a job, so I limited my options to the universities that my country approved of.”

PG student from Saudi Arabia

As opposed to many other international students, a recruitment agent noted that post-study work opportunities are ‘not a driving factor for Saudi national students. The moment they complete their course they return to Saudi Arabia because they have more opportunities here than in the study destination’. Alumni suggested that a short-term internship or an opportunity to gain work experience during the degree would be an attractive option for Saudi students, but is not essential. Instead, all interviewees were keen to return home immediately after their degree, as they wanted to start their career or preferred to settle near their families.

WHY ARE WE SECOND IN SAUDI ARABIA?

Even though the UK is the second most popular study destination for students from Saudi Arabia, its market share has remained only about one sixth of the US’ market share between 2010 and 2018, despite a number of competitive advantages that the UK has to offer:

- Interviewees said that the UK has a competitive advantage over the US because of its geographical proximity to Saudi Arabia and there is a direct and comparatively short flight connection between the two countries. Numerous interviewees also mentioned that the entry requirements – specifically, the lack of additional standardised tests such as GRE or GMAT – and its one-year postgraduate degrees make the UK an attractive choice.
- Additionally, all alumni expressed concerns about ‘the US visa and immigration regulations and students being held for hours’ (PhD student from Saudi). Stories about discrimination in the US have negatively affected the country’s reputation as a study destination in the last few years and made a number of students research the UK for their studies.
- Saudi alumni confirmed that they strongly considered rankings in their decision-making process, and the US and the UK, whose universities are well represented in the top positions, are perceived to offer the best-quality education.

Nonetheless, **the US** has remained by far the most popular study destination, with a **64.6%** market share in 2018. One interviewee explained that in addition to covering the tuition fees, government scholarships pay a monthly lump sum in Saudi Riyal – irrespective of the destination. The exchange rate is more favourable in the US, which gives the student a greater disposable income (UG student from Saudi Arabia).

Another reason for the US’ greater attractiveness is a clear perception of what life is like in the US – in part because US celebrities and influencers are much more visible on social media and display ‘a lifestyle that seems more enjoyable than in Europe’ (PG student from Saudi Arabia).

Even though alumni described the UK as attractive because of its fair and fast visa application process, its diversity, and its friendly and welcoming people, they noted that they had only learnt this once they were already in the UK:

“ I didn't know before I went that Islam is widespread in the UK; there are lots of people from everywhere. It would be helpful to know this before we come, this would make our decision easier!”

UG student from Saudi Arabia

Canada had the third largest market share, at **7.8%** in 2018, but according to a recruitment agent, it is primarily attractive to expatriate students in Saudi Arabia who want to build their career and do not have the same sponsorship and employment opportunities in the Kingdom. Next to quality of education, their decision is strongly influenced by the affordability of tuition fees, living costs and post-study work opportunities (recruitment agent in Saudi Arabia).

HOW CAN THE UK MAINTAIN ITS POSITION IN SAUDI ARABIA?

The interviews demonstrate that, rather than policy barriers, there is a lack of awareness of the UK's offer among Saudi national students. When asked how the UK could become more attractive, respondents suggested developing **stronger communications and media strategies**, especially on social media, to:

- a) demonstrate the diversity of the UK as a place that welcomes different cultures and,
- b) showcase different cities and regions in the UK, as there is little knowledge about places outside of London.

Respondents also recommended developing **stronger alumni networks** to which prospective students could turn with their questions, and suggested that universities should emphasize their unique selling points, such as academic traditions and culture, via their websites and social media channels.

MARKETS WHERE THE UK SHOULD REGAIN ITS POSITION

In the following markets, the UK used to have a very strong position and often a much larger market share than its competitors. However, in recent years, the UK's market position dropped significantly in India and Pakistan. This section examines why the UK is currently underperforming and how barriers to recruitment can be removed.

REGAIN



INDIA

OVERVIEW

With 1.34 billion people, the Republic of India is the second most populous country in the world. It is a young nation – in 2020 the median age was 28.7 years – and home to an ethnically diverse population, speaking hundreds of languages.⁷¹

English is one of numerous official languages, and mandatory from first grade until the end of compulsory schooling, but proficiency is 'low', with India ranking 50th in the world and eighth in Asia in the EF English Proficiency Index 2020.⁷² Since the 2000s, India has succeeded in reducing absolute poverty in the country, and between 2011 and 2015, more than 90 million people were lifted out of extreme poverty.⁷³

India has become one of the fastest-growing economies in the world. Among the reasons for this progress is the welcoming policy for foreign direct investments and a large pool of human resources in science and engineering, making India a global leader in engineering R&D, pharmaceuticals, and the manufacture of mobile phones and vehicles. The strong entrepreneurial culture and structural reforms to improve efficiency in production and innovation make the country a favourable investment environment and spur the holistic development of society.⁷⁴

Gross Domestic Product (GDP) of

US\$2.7tr

in 2020



Population of

1.34bn

in 2020



According to the study *India – Pushing the right levers*,⁷⁵ the key drivers of India's economic growth in the next 15 years will be the improvements and innovations in agriculture, manufacturing, service-delivery, start-up and venture capital enterprise, transportation infrastructure, energy efficiency, digitisation of customer services, technologically advanced governance and clean economy. The government also plans to improve and advance the Indian maritime sector by 2030 by developing mega-capacity ports in Gujarat, Maharashtra and the Odisha–West Bengal Cluster (Maritime India Vision 2030).⁷⁶

The Covid-19 pandemic and resultant lockdown measures dramatically impacted India's economic progress. The most severe effects were on poor and vulnerable households and individuals typically employed in the informal labour sector.⁷⁷

HIGHER EDUCATION

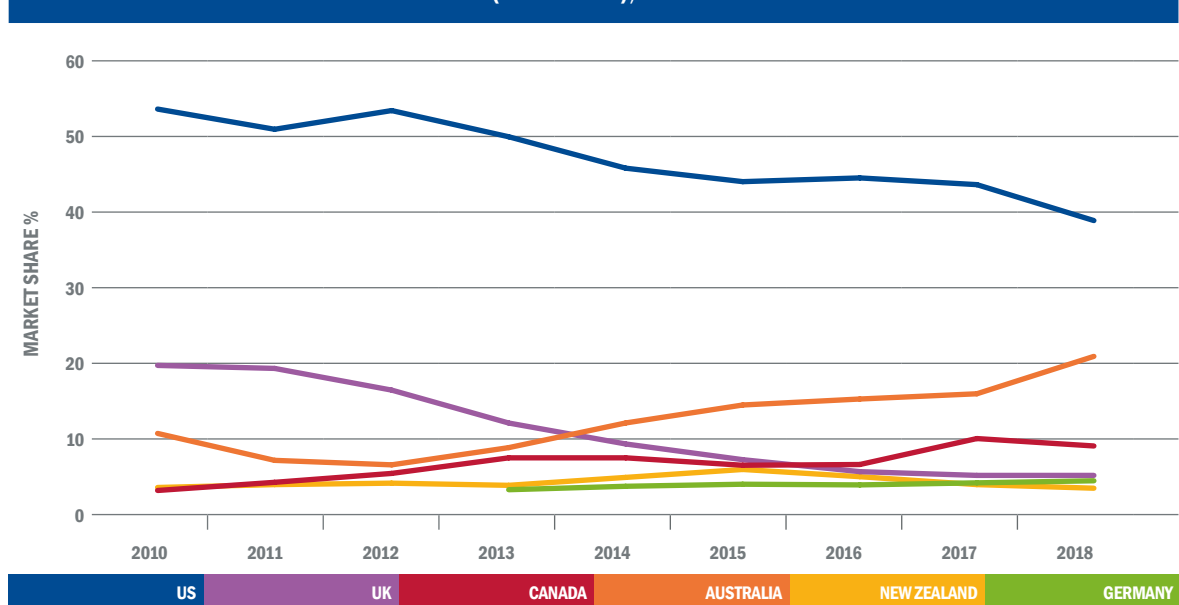
Gross tertiary enrolment in 2019 was low, at only 28.6%.⁷⁸ The higher education system in India can be characterised as large, complex and fragmented, but the online education market in India is the second largest in the world and is expected to grow further in the next few years.⁷⁹

India's new National Education Policy (NEP2020) is a comprehensive policy framework for reforming the school and tertiary-level education system by 2040. It reflects the government's commitment to improving the current system's capacity, improving access to tertiary-level education, and encouraging more domestically produced scientific research and discovery. The programme will be implemented gradually and includes the restructuring of domestic higher education institutions, reducing the regulations for overseas providers, and increasing institutional autonomy. Implementation of the strategy is regarded as challenging, despite the government's intent to increase public spending on education from 4.43% of GDP to 6% as soon as possible.⁸⁰

WHY DO INDIAN STUDENTS CHOOSE TO STUDY ABROAD?

In 2018, there were **350,399** internationally mobile Indian students, that is, **6.7%** of the total number of Indian students enrolled in tertiary education.⁸¹ The UK was the second most popular study destination for Indian students until 2013, after which its market share dropped steadily. In 2018, the US was ranked the top study destination, with a **38.8%** market share, Australia was second (**20.9%**), Canada third (**9.9%**) and the UK fourth, receiving **5.6%** of the internationally mobile students from India (see [Figure 7](#)).

FIGURE 7: MARKET SHARE CHANGES IN INDIA (2010–2018), BY 2018 RANK

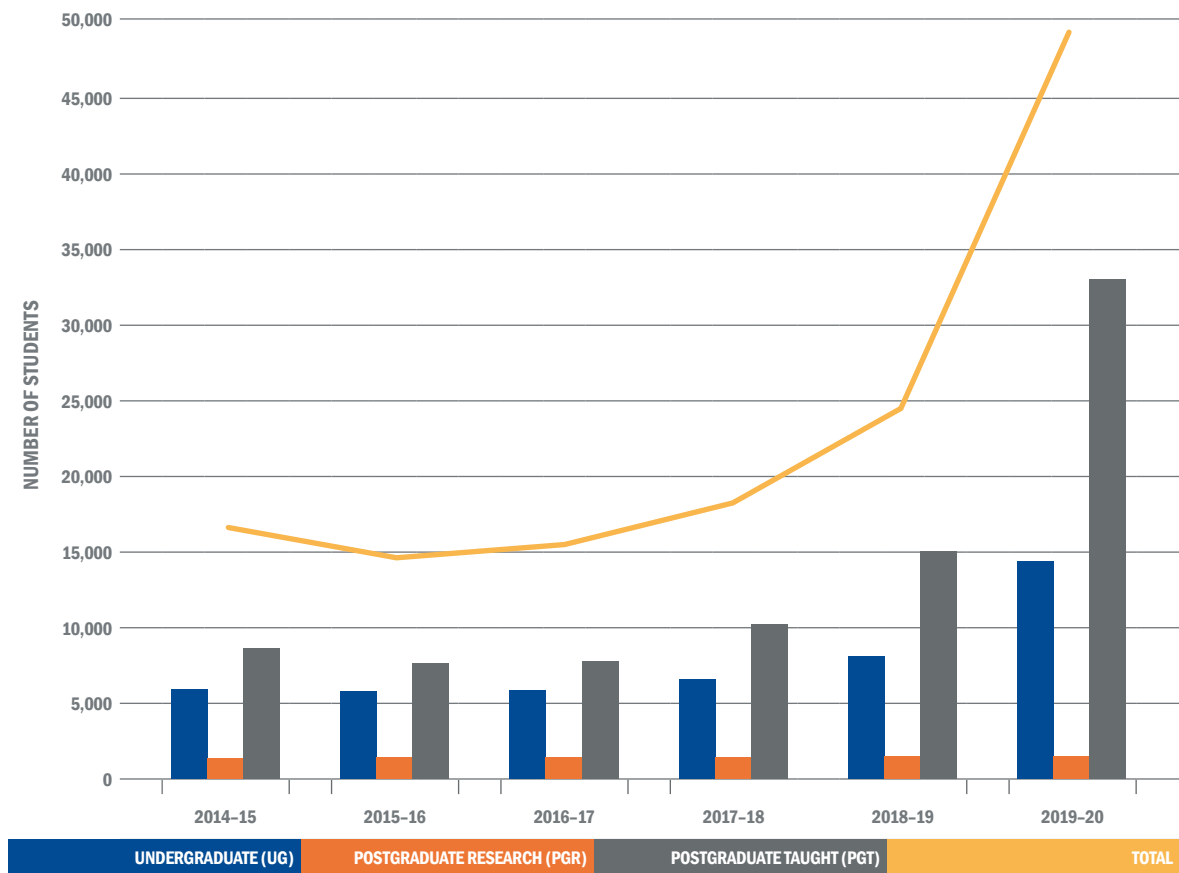


Data source: UIS.Stat, June 2021

WHY DO INDIAN STUDENTS CHOOSE TO STUDY ABROAD?

The development of Indian student numbers in the UK over the last six years can be seen in **Figure 8**. In the 2019–20 academic year, the top five study disciplines for Indian students in the UK were business and management, computing, engineering and technology, subjects allied to medicine and social sciences. That year, **87.1%** of Indian undergraduates and **77.3%** of postgraduate students had no award or financial backing to cover their tuition fees for UK universities. Almost **9.4%** of postgraduates had access to a fee waiver or award from the institution, while only **6.1%** of undergraduates had the same opportunity.⁸²

FIGURE 8: NUMBER OF FULL-TIME STUDENTS FROM INDIA (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

Interviews showed that the primary drivers for Indian students to study abroad are access to high-quality education, practical work experience and international exposure to **increase their employability**.

“To study at an internationally recognized university with reputed academic staff and research history to gain employable skills.”

PG student from India

“Western exposure in my postgraduate degree will be a setting stone to my career.”

PG student from India

Another driver for studying abroad is the hope that it will present more opportunities to **gain skills and experience in their desired field**. Alumni mentioned that competition to get into a good Indian university is tough, sometimes the desired degree is not available in India or not yet well established, and practical experience – for instance, through internships – is only possible after completion of the undergraduate degree.

“*In India you can't do internships until you have your degree, so the chances are very low. Also, people tend to focus more on theory, so going abroad is a better option for research.*”

Prospective UG student from India

Interviewees also reflected that studying abroad provides them with opportunities for **personal development**. Life away from home is valued because it equips the student with practical skills to deal with everyday situations independently in a foreign country.

“*Also, the experiences make you independent. The lives we live in India right now are pretty laidback and comfortable. Studying abroad throws you into the real world.*”

Prospective UG student from India

WHAT IS IMPORTANT TO INDIAN STUDENTS WHEN CHOOSING A STUDY DESTINATION?

Almost all interviewees said that their biggest concern was finding a job after graduation. According to a recruitment agent, Indian students' choice of a study destination is heavily influenced by medium-term **goals after graduation**, that is, whether they want to gain international work experience after graduation, prefer to come back home, or want to keep their options open.

“*Recent policies letting students stay two more years after finishing the course help a lot; anything that grants us flexibility is beneficial.*”

Recruitment agent from India

Additionally, **costs** are a major factor when choosing a destination. Interviewees reflected that they weigh their options based on the availability of external funding, fee waivers, living costs and work opportunities during and after graduation.

“*I think for me tuition fees and living costs were a big factor and also scholarships. But if [I can only select one factor] then it would be employment. I would go to a country where there are more employment opportunities after graduation, as this was something I had planned for after the degree.*”

Postgraduate student from India

The **availability, duration and quality** – often assessed via rankings – of their preferred course was another decisive factor for most alumni interviewed for this research.

“ For me, it kind of transpired from what I wanted to study, and this is how I narrowed it down. Because I wanted to focus on the luxury industry, my choice of location was limited to Italy, France or the UK.”

PG student from India

“ The UK is the world leader in shipping, and when it comes to shipping law and insurance, London is the capital of that and always has been for its historical roots. And that is why I chose the UK.”

PG student from India

Smaller but still influential factors for some individuals are the availability of one-year postgraduate degrees, the **ease of admission** and the **visa application process**.

“ My sole reason to choose the UK was because it was the only country offering a one-year degree and the time was the most important part of my decision-making process. I didn't mind how tedious the work was in this one year, and eventually, I was very satisfied.”

PG student from India

Finally, a few interviews revealed that **family connections**, cultural familiarity and feeling welcome in the study destination can also be important in selecting one country rather than another. Knowing that there is a large South Indian and Asian diaspora in the destination means that students will not feel isolated or completely abandon their culture, traditions and customs while living abroad.

WHY AREN'T WE SECOND IN INDIA?

According to respondents, **the US** has been and still is the most popular destination, due to its highly ranked institutions and degree programmes, and its well-established reputation for providing high-quality education. Additionally, an interviewee mentioned that providers have a great number of scholarships for international students available, especially at PhD level.

The UK's market share loss since 2010 has meant a market share gain for **Australia** and **Canada**, which ranked second and third respectively in 2018. Interviewees emphasized the breadth of the offer in these study destinations. Both countries offer high-quality courses at top-ranked institutions – even though they are less established than the US and the UK – along with excellent post-study work opportunities.

Interviewees emphasised that **the UK** – together with the US – offers the best education; however, a significant barrier to selecting the UK as a study destination in recent years has been the lack of post-study work opportunities. Interviews showed that Indian students look for the 'full package' which is determined by quality, affordability and post-study work options.

“ We [alumni] are kind of ambassadors, and when people ask us if we got a job afterwards, we would probably tell them that Australia or Canada would be a better place to go to study. Even though the quality of education is better in the UK, you just don't get the full package there.”

PG student from India

“ In general, Indian students are looking for a destination that offers quality education with stay back opportunities. Once we start the counselling process, a popular question that is often asked is “Okay, but what are the stay back opportunities that this country would offer?” The main reason to stay back is that [students] feel that certain countries in the West have a lot of opportunities, the infrastructure and living standard are better. Students want a better life for themselves, and they feel that this would be possible abroad. And being associated with another country is a matter of prestige.”

Recruitment agent from India

HOW CAN THE UK REGAIN ITS MARKET POSITION IN INDIA?

A big step towards improving recruitment from India to the UK has been the **launch of the new Graduate route**, which makes the UK much more competitive as it now offers a better package for Indian students. Ensuring the long-term availability of post-study work opportunities will therefore be essential. Responses by interviewees showed that many were not yet aware of the new Graduate route in the UK, so stronger promotion of this opportunity in India might be beneficial.

Nevertheless, financial concerns remain an issue, as the UK is comparatively expensive. A recruitment agent, as well as several alumni, suggested **increasing the financial support** available to international students through more scholarships or loans, even partial ones.

“ Scholarships by providers and the government would be helpful – of course we can't please everyone. But for example, the Women in STEM scholarship was great and really got good media coverage in India and helped to increase interest. Also, some universities can do much better with scholarships.”

Recruitment agent from India

“ The UK can establish a loan or grant scheme, not necessarily reduce the tuition fees, but a mechanism to provide support to international candidates. ... The reason for offering this is that ... the person will eventually work in the country, pay taxes, contribute to the economy and pay off that debt.”

PG student from India



PAKISTAN

OVERVIEW

In 2020, the Islamic Republic of Pakistan had a population of around 220 million and was the fifth most populous country in the world. English is an official language, along with Urdu; it is widely used in government and mandatory from 1st to 12th grade. However, according to the EF English Proficiency Index, Pakistan ranks 61st in the world, meaning it has generally low English language proficiency.⁸³

Pakistan's large youth population – over 55% are under the age of 24 years – presents great opportunities for economic growth, but its status as emerging market is fragile. Internal political disputes, low levels of foreign investment, inconsistent macroeconomic policies, and an overreliance on textile and agricultural exports which makes the country vulnerable to shifting global demands have resulted in slow economic growth over the last 20 years, with an average of 2% per capita annually, and 3% annually between 2016 and 2020.^{84,85} Inflation averaged 6.6% per year between 2016 and 2020.⁸⁶ In 2017, official unemployment was at 6%, but this does not capture the true picture, as the informal economy provides the livelihood for the majority of the poor and underemployment remains high.⁸⁷

The Covid-19 pandemic further exacerbated the situation, as the global reduction in economic activity negatively impacted remittances, demand for Pakistani products declined, and measures to contain the spread also hit the informal economy, increasing the likelihood of more and more people falling back into poverty.⁸⁸

Gross Domestic Product (GDP) of

US\$263bn

in 2020



Population of around

220m

in 2020



PAKISTAN 2025: ONE NATION – ONE VISION

Speedy economic reforms are crucial to support sufficient growth to employ the young and increasingly urbanized population and prevent further brain drain.

The national development strategy, Pakistan 2025: One Nation – One Vision aims to recreate the ‘Pakistani Dream’ of a prosperous, equitable, tolerant and dynamic society which was central to the independence movement and led to the country’s foundation in 1947. The vision is the first stage towards Pakistan’s goal of becoming a high-income country, among the 10 largest economies in the world, by 2047. The vision recognises the various challenges that Pakistan faces and sets out seven pillars to strengthen its developmental foundations: developing human and social capital; achieving sustained, indigenous and inclusive growth; governance, institutional reform and modernization of the public sector; energy, water and food security; private sector- and entrepreneurship-led growth; developing a knowledge economy; and modernizing transportation infrastructure and greater regional connectivity.⁸⁹

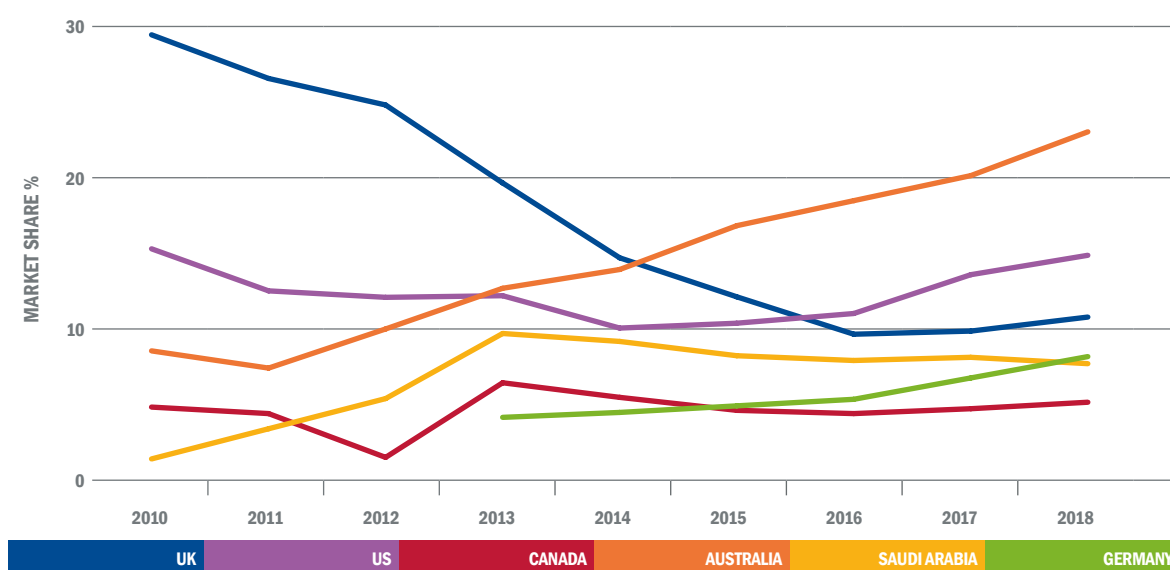
HIGHER EDUCATION

In Pakistan’s national development strategy, developing human and social capital is a priority and, alongside health and social development, education plays a key role. While primary education levels are high and have risen to around 95% since 2014, and secondary gross enrolment has also increased, tertiary gross enrolment was only 9% in 2018.⁹⁰ Government expenditure on education will increase to 4% of GDP (from 0.2% of GDP to 1.4% of GDP for higher education) by 2025 to strengthen enrolment on all levels and to improve the quality of education. Additionally, plans include building new universities, especially technology and engineering institutes; restructuring the university system; developing smart campus systems to improve the learning environment; improving access to higher education through online courses; and strengthening linkages between higher education and the labour market.⁹¹

WHY DO STUDENTS FROM PAKISTAN CHOOSE TO STUDY ABROAD?

In 2018, **58,821** Pakistani students, which is **3.1%** of the total number of Pakistani students enrolled in tertiary education students, studied abroad.⁹² **Figure 9** shows that the most popular study destinations that year were Australia (**23.3%**), the US (**15.3%**), the UK (**11.5%**), Malaysia (**7.9%**) and Germany (**7.1%**).

FIGURE 9: MARKET SHARE CHANGES IN PAKISTAN (2010–2018), BY 2018 RANK

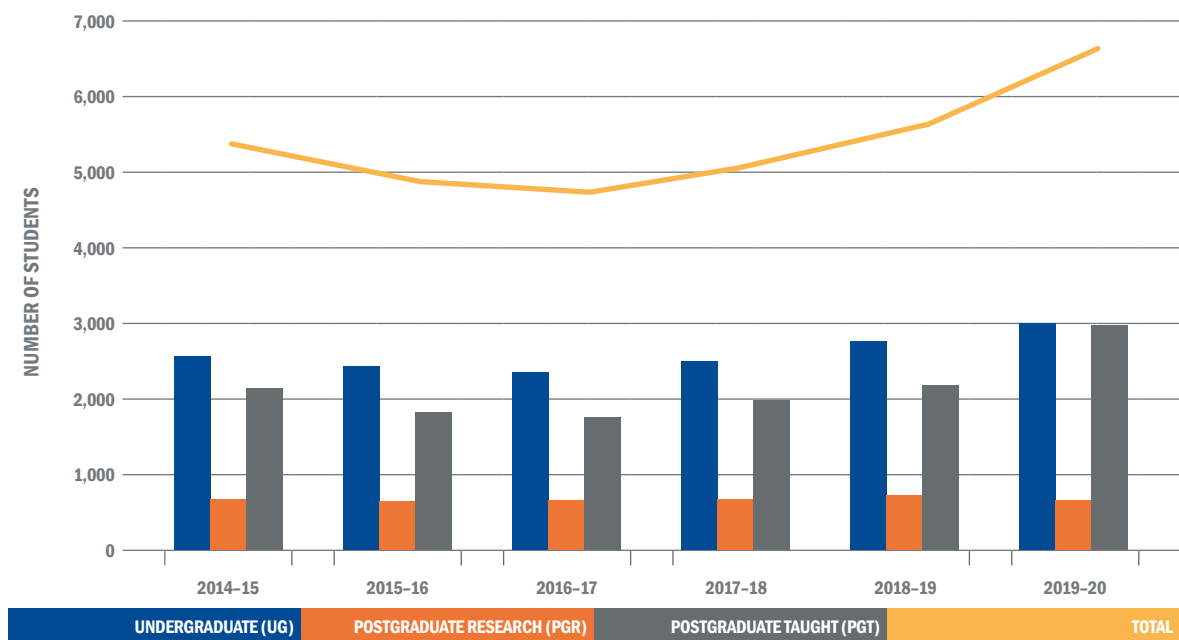


Data source: UIS.Stat, June 2021

WHY DO STUDENTS FROM PAKISTAN CHOOSE TO STUDY ABROAD?

Figure 10 shows the development of Pakistani student numbers in the UK since 2014–15. In the 2019–20 academic year, the most popular areas of study for Pakistani students in UK institutions were business and management, engineering and technology, law, computing, and social sciences. While **89.6%** of postgraduates and **71.5%** of undergraduates covered their tuition fees via private sources, **4.1%** of the postgraduates and **10.9%** of the undergraduates received a fee waiver or award from the provider. A total of **71.5%** of postgraduates and **89.6%** of undergraduates do not have an award or financial backing for their tuition fees, while **10.9%** and **4.2%** received a provider waiver or award, respectively.⁹³

FIGURE 10: NUMBER OF FULL-TIME PAKISTANI STUDENTS IN THE UK (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

Interviews showed that the main reason for many Pakistani students to study abroad is limited opportunities at home. On the one hand, an overseas degree means an opportunity for **personal development**. Prospective students explained that they get international exposure, learn new skills and acquire a different way of thinking and thereby hope to ‘gain a competitive edge and be familiar with the latest trends’ (prospective PG student from Pakistan).

“Your personality develops a lot when you are studying with people from other countries, you learn from them, their cultures and how are things done in different countries.”

Prospective student from Pakistan

In addition, interviewees reflected that they were looking for **post-study work opportunities** to gain practical experience in another country. The labour market in Pakistan is very competitive, so international experiences which are highly sought after would hence allow for better career options.

“The idea is that I invest approximately £26k in a Master’s degree, and completing my studies, living there, etc., what is next? When I graduate what are the opportunities for me? If I graduate from XYZ, what are the chances of getting employed after that?”

Recruitment agent in Pakistan

Part of the reasoning behind going abroad is **quality of education**. For example, Pakistani alumni mentioned that their degree of choice was not available in Pakistan, or they wanted to gain practical experience as part of the degree, which was not possible at home.

WHAT MATTERS TO PAKISTANI STUDENTS WHEN SELECTING A STUDY DESTINATION?

In addition to the quality of education, funding is a strong influencing factor for Pakistani students when selecting a study destination, and most students will look for a ‘**combination of good university and affordability**’ (prospective PG student from Pakistan). Many Pakistani students do not have much of a choice, as they rely on external funding and the availability of scholarships primarily determines the destination. Many also have to choose the country and city where their **extended family** lives, as this is a way to reduce costs.

“I know many people who wanted to study in the UK, and they had offer letters but ultimately they could not come because of the funding.”

PG student from Pakistan

“I only had the option to study in Scotland, because my family lives here. I chose [university], because of the opportunities given to international students. I just had to choose [city] because of my family.”

PG student from Pakistan

Respondents across all groups added that even when students have secured funding, either through their family or through external sources, studying abroad is still a significant financial burden, so **return on investment** is crucial. This could be a cost-effective one-year degree programme or the possibility of a post-study work visa.

“I started researching the best places where you could get the most benefit out of your time there.”

Prospective student from Pakistan

“ [Students who return to Pakistan] with no work experience and no network, have very slim chances to find employment. So yes, post-study work opportunities are crucial. Plus, the other thing is that you spend so much money on your education but then you don't get an opportunity to get any return on your investment. I believe it plays a great role in the decision. Nowadays people are not looking at the destination but at the return on investment.”

PG student from Pakistan

WHY AREN'T WE SECOND IN PAKISTAN?

Until 2013, the UK was the most popular study destination for Pakistani students. However, since the abolition of the post-study work visa, the UK's market share dropped starkly, mostly to Australia's advantage, which ranked first in 2018.

“ A lot of students actually decided to go to Australia when the post-work study visa was scrapped in the UK and people still go to Canada and Australia because they can stay there after graduation.”

PG student from Pakistan

Further, **the US** has regained a stronger position since 2014 and ranked second in 2018. Some interviewees suggested that the US was attractive because of the quality of the Ivy League universities. It is also perceived to offer more financial support, especially scholarships. However, a lengthy visa process with high rejection rates has deterred some participants from applying.

All interviewees stated that **the UK's** attractiveness is based on its high quality of education and the ranking and reputation of its universities. Additionally, some mentioned its cost-effectiveness, as one-year degrees allow students to quickly rejoin the job market and many postgraduate courses in the UK offer placements or internships. However, respondents made it clear that return on investment in the UK was low, and it lost out against other countries in terms of post-study work opportunities.

“ I don't think the perception of the quality of education is in question, I think it is more about where you get more opportunities after your education.”

PG student from Pakistan

A recruitment agent, however, reported an increased interest in the UK now that the Graduate route has reinstated post-study work opportunities:

“ Students want to be considered for placements especially in PG courses. The UK is perceived as excellent for placements. ... They used to ignore the UK because there were no opportunities for them after they completed their degrees. Now with the visas and opportunities to work, they are really drawn to the UK.”

Recruitment agent in Pakistan

Germany has recently grown to become a viable alternative to the top English-speaking destinations. Respondents pointed out the country's very low tuition fees and living costs and its excellent reputation in specific fields, such as engineering. However, a lengthy visa process discouraged many interviewees from applying to universities in Germany.

HOW CAN THE UK REGAIN ITS MARKET POSITION IN PAKISTAN?

Overall, the UK is a top study destination for Pakistani students, as it offers high-quality and cost-effective study options. Interviewees gave little feedback on specific barriers whose removal could improve the UK's attractiveness, rather observing that the UK already has 'the most important thing – the post-study visa' (PG student from Pakistan). This highlights how **Graduate route** is key to the UK's attractiveness as a study destination and that its continued promotion will be important in recruiting future Pakistani students.

Other recommendations from respondents related to **financial support**, such as low-income scholarships rather than merit-based scholarships, lower tuition fees or lower accommodation costs. To address the latter, increased advertising of the benefits of the UK's diverse regions and cities could be helpful.

MARKETS WHERE THE UK SHOULD DEVELOP ITS POSITION

The third category consists of countries where the UK has a relatively weak market position as there are fewer cultural connections or weaker trade and diplomatic links. However, the data shows a strong demand for overseas higher education and other English-speaking countries are performing very well. The following country analyses explore why the UK is underperforming and how it could develop its market position in these countries.

DEVELOP



BRAZIL

OVERVIEW

The Federative Republic of Brazil, with a population over 213 million, is the eighth largest economy in the world.⁹⁴ With a GDP of US\$1.4 trillion, it is a rising economic power and the most influential country in South America.⁹⁵

The Covid-19 pandemic hit Brazil at a time when it was still recovering from its 2014–16 recession; the employment rate is low and stagnating and even though more than half of the population is considered middle class, poverty and inequality are higher than in most advanced countries.⁹⁶ Nonetheless, Brazil's economy recovered strongly at the end of 2020, and GDP growth is expected to reach 3.7% in 2021.⁹⁷

The transition to a greener and more sustainable economic growth model, however, remains a challenge. Brazil is home to more than 60% of the Amazon rainforest and a large proportion of renewable natural resources. However, high exposure to climate change and rapid deforestation pose a risk to its natural reserves and environment. The World Bank's priorities in its partnership with Brazil cover health care, agricultural and rural development, environment, water resource management and transport.⁹⁸

Eight largest economy in the world with

US\$1.4tr

GDP in 2020



Population over

213m

in 2021



NATIONAL DEVELOPMENT PLAN

In October 2020, the Brazilian government set out a framework for economic development in the 2021–2030 period. The Federal Development Strategy is a long-term endeavour to raise the gross domestic product per capita by as much as 3.7% by 2030. This goal, along with the 3.7% annual GDP growth, will be achieved through transformative fiscal, economic and education initiatives in the 2021–2030 period.^{99, 100}

HIGHER EDUCATION

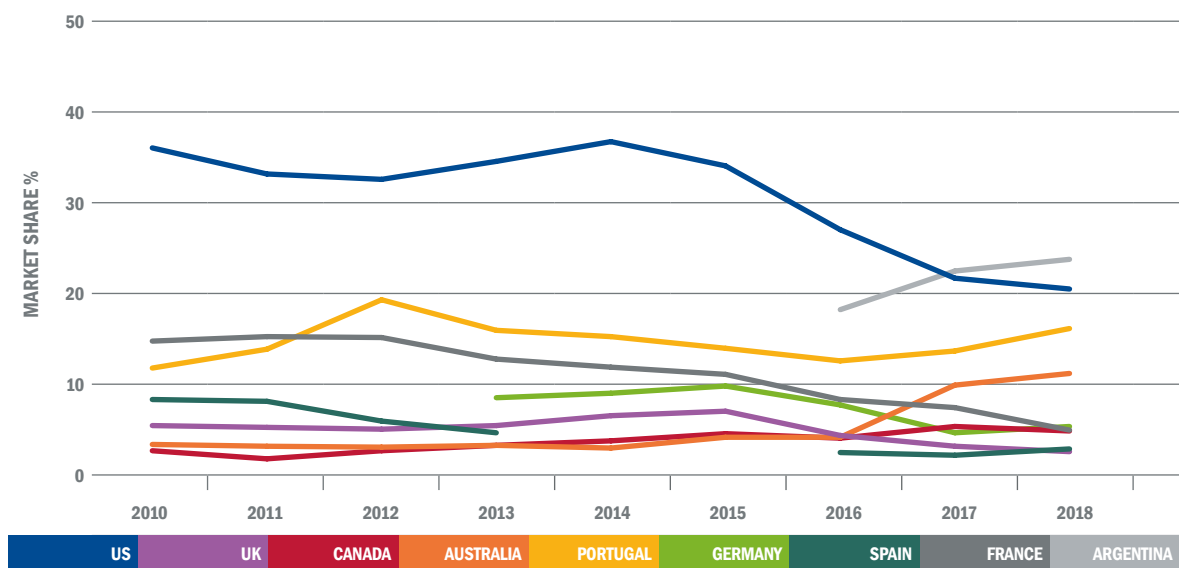
In 2019, gross enrolment in tertiary education was 53.3%.¹⁰¹ English language proficiency in Brazil is low. It ranks 53rd worldwide and 10th in Latin America, according to the EF English Proficiency Index.¹⁰²

The Brazilian higher education system was previously considered insular but has now opened up to internationalisation – especially through CAPES PrInt funding which supports the internationalisation of academic programmes at home¹⁰³ – to attract international talent and produce research in collaboration with overseas partners.¹⁰⁴

WHY DO BRAZILIAN STUDENTS CHOOSE TO STUDY ABROAD?

In 2018, only a small proportion – **0.8%** (**67,183** students) – of the total number of Brazilian students enrolled in tertiary education studied abroad. The top study destinations were Argentina (**23.8%**), the US (**20.5%**), Portugal (**16.1%**) and Australia (**11.1%**) in 2018. The UK only ranked ninth, with a market share of **2.4%** (see **Figure 11**).¹⁰⁵

FIGURE 11: MARKET SHARE CHANGES IN BRAZIL (2010–2018), BY 2018 RANK



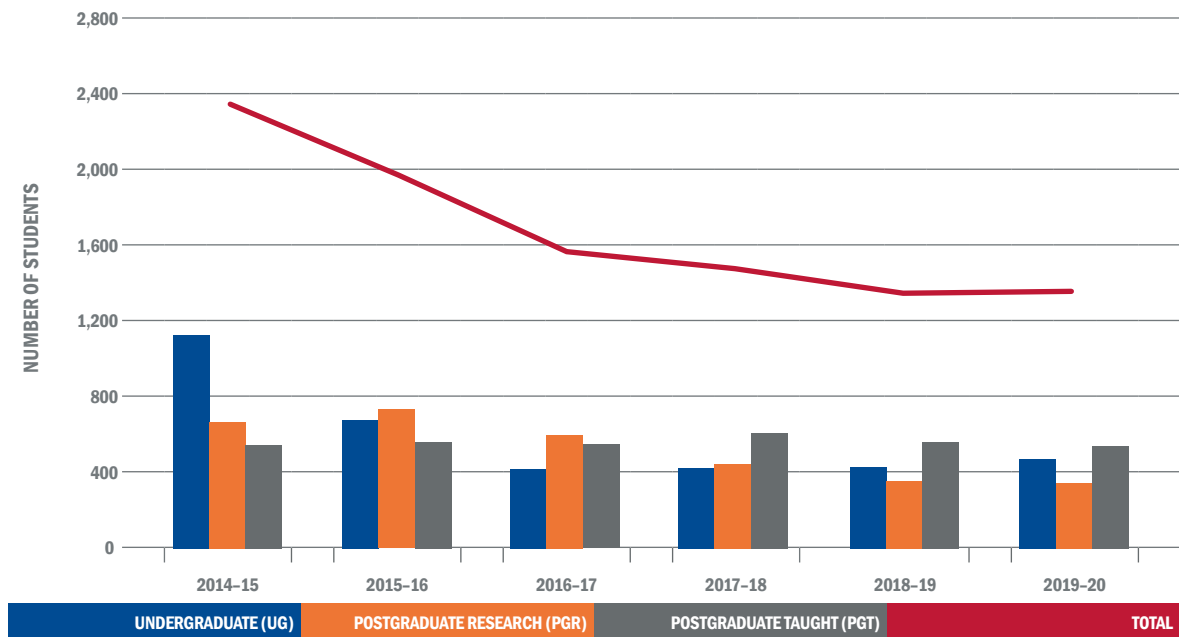
Data source: UIS.Stat, June 2021

WHY DO BRAZILIAN STUDENTS CHOOSE TO STUDY ABROAD?

Figure 12 shows the numbers of Brazilian students in the UK from 2014–15 to 2019–20.

In 2019–20, the top three disciplines for Brazilian students across all levels in UK institutions were business and management, social sciences, and creative arts and design. A total of **52.9%** of postgraduate and **88.1%** of undergraduate students from Brazil had no award or financial backing to cover their tuition fees, while **20.4%** of postgraduate and **5.9%** of undergraduate Brazilian students had access to fee waivers or awards from their institution in the same year.¹⁰⁶

FIGURE 12: NUMBER OF FULL-TIME BRAZILIAN STUDENTS IN THE UK (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

Interviews with alumni and recruitment agents showed that for many Brazilian students, the main reason to go abroad is a **deep desire to learn about new cultures**, meet new people and make friends around the world. Traveling, studying or living abroad to experience a different life and culture is a dream almost all respondents have had from a young age.

“To study abroad is something that all Brazilians want to do for a time in their life. It is an international experience, you can learn about other cultures, you can practice a foreign language, make friends from all over the world. Since school we grow up with this dream of doing an exchange at some point or a Master’s abroad. In Brazil we are open to other cultures. We like to travel and go abroad and receive people from other cultures.”

Recruitment agent in Brazil

The quality of education at home is perceived as good but some degrees are not available in Brazil, and postgraduate degrees require a lot of preliminary work or are long in duration. Some interviewees therefore looked for opportunities overseas because they wanted to study **a degree that met their interests** and would provide them with the necessary qualifications to pursue a career in the desired field. In certain fields an international degree is very valuable.

“ I wanted to study in a different country because in Brazil I couldn't really find a degree that fulfilled my interests, my career interests. So, I decided to find a Master's degree that would give me the qualifications that I needed.”

PG student from Brazil

WHAT MATTERS TO BRAZILIAN STUDENTS WHEN SELECTING A STUDY DESTINATION?

All interviewees reflected that funding was the most important factor when selecting a study destination. Unless they had the personal funds available, alumni limited their choice to the countries where they could obtain a **scholarship**.

“ To be really honest, I don't think I would have come at all without the scholarship, because the exchange rate is really tough on the Brazil side, so I think it takes a long time to be ready to come here. I think I would have given up, most likely.”

PG student from Brazil

“ Yes, most of them look for scholarships. Chevening is a very popular programme in Brazil. For most people who can't go it's because they didn't get a scholarship. Some people can pay or ask their families, but they always ask if there are at least partial scholarships.”

Recruitment agent from Brazil

A few interviewees who did not receive a fully funded scholarship but had some funds to go abroad considered **employment opportunities during the degree** in the study destination to support themselves.

Additionally, most interviewees mentioned that **quality of education** is an influential factor. Because universities at home are good, students look for higher-ranked universities abroad, seeking education systems that add value to the one that they already know and take a different approach to teaching and learning.

The **culture and lifestyle** in the study destination were also important factors that influenced interviewees' decision. Most had been to a specific country or city previously and 'fell in love' with it, which then strongly influenced their decision to study there.

“ Then, I fell in love with London, and I decided to study there for the degree. I knew that the universities and the courses are really good, and I knew it is one of the main destinations, but I was a bit biased, because since I fell in love with London, I thought the UK universities are better than the ones in the US and Australia.”

PG student from Brazil

WHY AREN'T WE SECOND IN BRAZIL?

Interviews with alumni showed that since the quality of education at home is considered good and studying abroad is primarily driven by a deep desire to live a different lifestyle and have a great international experience, a degree from abroad is nice to have but not necessary. A recruitment agent also explained that due to their linguistic and cultural proximity, **Argentina** and **Portugal** are very popular destinations; they ranked first and third, respectively, in 2018.

For students who are looking for excellent universities, English-speaking study destinations are very attractive. The US has strong links to Latin America and is geographically nearby, and interviewees explained that Australia, which had the fourth highest market share in 2018, is popular because the lifestyle and climate are similar to Brazil, and it has a reputation for excellent higher education.

Only a small proportion of students went to study in the UK in 2018; it only ranked ninth. The UK is perceived as very attractive in terms of quality of education and culture, but interviewees were clear that without a scholarship, the UK is not accessible to Brazilians.

HOW CAN THE UK DEVELOP A STRONGER MARKET POSITION IN BRAZIL?

Even though the UK has never been among the top-ranked study destinations in Brazil, the high proportion of students choosing the US and Australia show that there is demand for high-quality English-speaking study destinations.

Additionally, participants pointed out how much Brazilians love the UK's culture, literature (especially Harry Potter), music and movies, and it would be useful to play much more to its strengths through **targeted communications campaigns** on the ground, as Brazilian students value having a 'human connection and someone who can answer your questions face to face,' (PG student from Brazil).

Alumni reflected that there is little awareness about UK higher education and universities, suggesting that universities should engage more actively with Brazil through, for example, **university fairs**:

“ At the university fair, there were only two unis from the UK. The unis should do a better job in presenting their schools in Brazil. ... we know that Europe and the UK have so much history, traditions. They have to reinforce why the universities are good for research, how powerful they are.”

PG student from Brazil

Finally, all interviewees emphasised that **more financial support** in form of (partial) scholarships, loans or fee discounts would be helpful to attract more Brazilian students.



INDONESIA

OVERVIEW

The Republic of Indonesia is the world's largest island country, the fourth most populous country, and the largest economy in the Southeast Asian region. There are 275.1 million people spread across a chain of over 17,000 islands. Indonesia has an ethnically, religiously and culturally diverse population, united by a centralised government.¹⁰⁷

Over 700 languages are spoken in Indonesia, while the official language, Bahasa Indonesia, was developed in the twentieth century as a unifying force by nationalists striving for independence from colonial rule.

Over the past two decades, Indonesia's economy has grown steadily and achieved sustained development. Key contributors to this prosperity include favourable economic policies, as well as Indonesia's natural resources, such as oil, natural gas and forestry.¹⁰⁸ Until the pandemic, Indonesia was classed as an upper middle-income country¹⁰⁹ with a flourishing middle class, and has made strides in reducing poverty. It aspires to be a high-income country by 2045.¹¹⁰

Indonesia has a growing economy

US\$1.1tr

GDP in 2020



Population of around

275m

in 2020



NATIONAL DEVELOPMENT STRATEGY

Indonesia has an economic development plan for 2005 to 2025, divided into five-year plans. The current one, running from 2020 to 2024, focuses on strengthening the Indonesian economy through the advancement of domestic human capital and becoming more competitive internationally.¹¹¹

Additionally, the Masterplan for Acceleration and Expansion of Indonesia's Economic Development (MP3EI) aims to accelerate economic development and improve equality in Indonesian society. It envisages a growth in per-capita income and GDP by 2025 through increasing industrial production processes and improving the efficiency of natural and human resources.

Key areas for improving Indonesia's competitiveness internationally are:

- Agriculture
- Mining
- Energy
- Industry
- Marine industries
- Tourism
- Telecommunications
- Strategic regional development¹¹²

The Covid-19 pandemic reset the progress made by the government to reduce poverty and inequality levels in the country. An emergency relief programme was rolled out in 2020, equivalent to 3.8% of 2020 GDP and 4.2% of 2021 GDP. The funds were used to subsidise vaccine rollout, minimise health impacts, and provide financial relief for households and companies.¹¹³

HIGHER EDUCATION

The education system in Indonesia faces challenges regarding the provision of inclusive and high-quality education. Graduates of tertiary-level institutions demonstrate low attainment levels and are not equipped with the skills to develop a knowledge-based economy. Unemployment rates are high in the country, disincentivising individuals to pursue a higher education degree.¹¹⁴

Successive Indonesian governments have implemented a set of policies to restructure, decentralise and improve the education system since the mid-2000s. For instance, public spending was increased and teacher training standards were improved. These reforms have contributed to bridging inequality of access to early years and primary school education for less wealthy Indonesians. But implementation issues have led to a limited real-world impact in terms of improving the quality of education and raising attainment.¹¹⁵

Participation in tertiary-level education domestically and abroad is primarily for upper-middle-class Indonesians inhabiting urban areas of the country.¹¹⁶ However, increasing domestic potential and investing in human capital development at home is crucial for the Indonesian government.

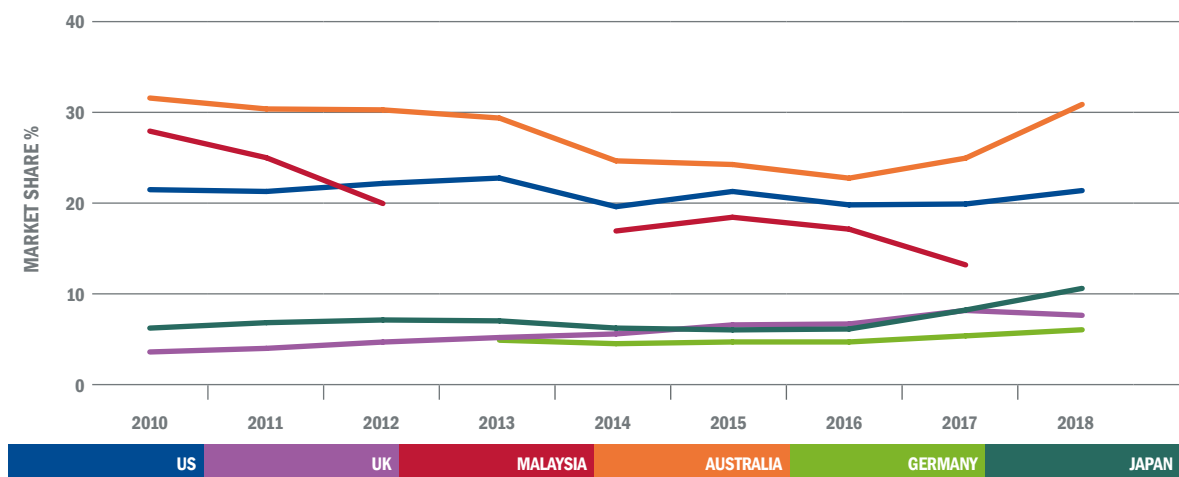
The Indonesian Education Scholarship (LPDP) is a funding opportunity for prospective Indonesian undergraduate, postgraduate and doctoral students in specific subject areas to finance higher education in domestic or international institutions. The scholarship covers the full course. A government-approved list of institutions and courses is used to ensure that the scholarship will fund a high-quality degree abroad. It is awarded based on merit and contractually binds the student to return to Indonesia after graduation.¹¹⁷

WHY DO INDONESIAN STUDENTS CHOOSE TO STUDY ABROAD?

In 2018, a total of **49,900** students from Indonesia were internationally mobile; as a proportion of all tertiary students this is about **0.9%**. Over the last ten years, outbound mobility from Indonesia has decreased significantly: **17%** fewer students studied abroad in 2018 than in 2008.

In 2018, **30.5%** of internationally mobile students from Indonesia went to study in Australia,¹¹⁸ 21.1% pursued degrees in the US, **10.5%** went to Japan and **7.5%** to the UK (see **Figure 13**). Since 2010, the UK has become an increasingly popular destination for Indonesian students and overall, its market share increased by **4%** between 2010 and 2018, making Indonesia one of only five countries of the top 21 sending countries and territories where the UK's market share increased.

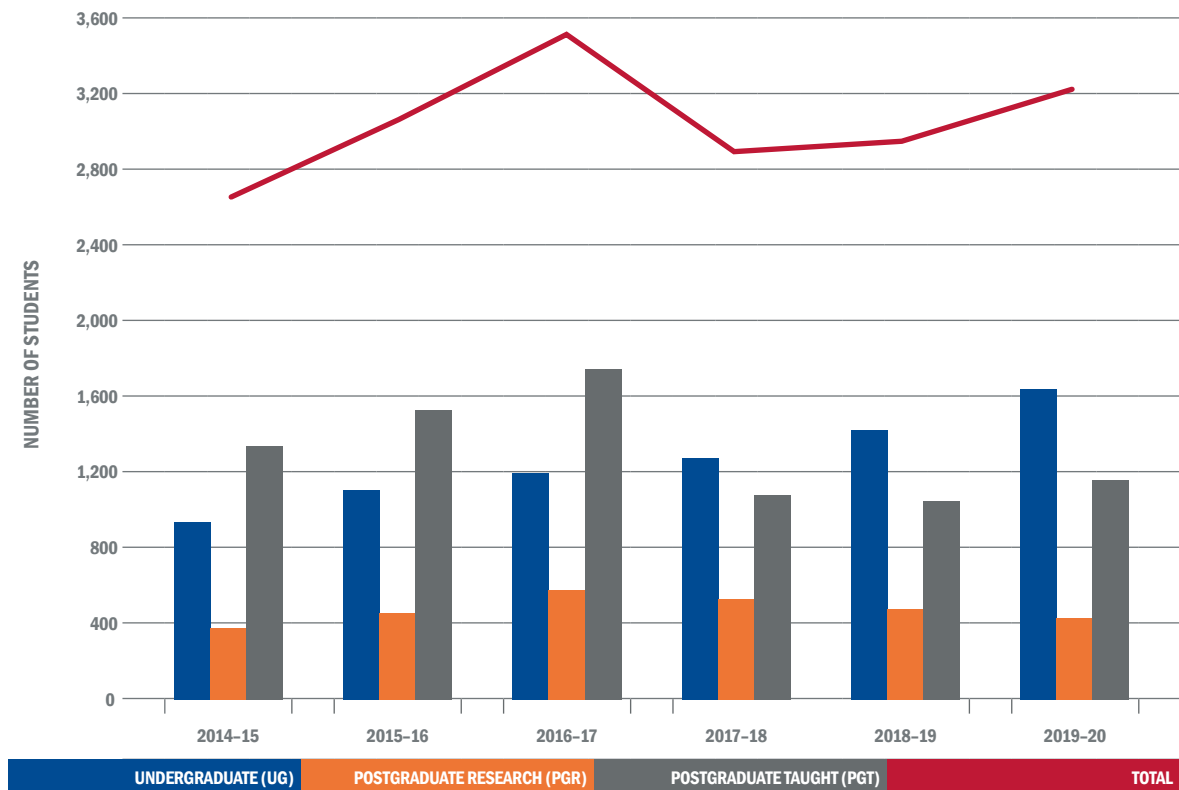
FIGURE 13: MARKET SHARE CHANGES IN INDONESIA (2010–2018), BY 2018 RANK



Data source: UIS, Stat, June 2021

Figure 14 shows Indonesian student numbers in the UK since 2014–15. In the 2019–20 academic year, the primary study disciplines for Indonesian students across all levels in UK institutions were business and management, engineering and technology, and social sciences. While **48.1%** of postgraduate and **88.7%** of undergraduate students covered their tuition fees via private sources, **29.7%** of postgraduate students drew on other overseas sources, and **5.9%** of undergraduates had access to fee waivers or awards from the institution.¹¹⁹

FIGURE 14: NUMBER OF FULL-TIME INDOONESIAN STUDENTS IN THE UK (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

Interviews with Indonesian alumni, prospective students and recruitment agents revealed that students have a mix of personal and professional development reasons for choosing to pursue higher education abroad. Firstly, students consider the quality of education abroad to be better than at home and see more opportunities to develop their careers. In Indonesian universities, it is impossible to pursue a postgraduate degree in a different field of study from one's undergraduate degree. Also, teaching methods at home are regarded as more theoretical, while overseas institutions are felt to provide more opportunities for practical engagement and skills development.

Secondly, respondents said that they value the opportunity to experience **living in a different country** and immersing themselves in a different culture and language, and especially value the chance to improve their English language skills and their ability to communicate with people from various backgrounds. English is only mandatory at intermediate and secondary school levels, hence English proficiency in the country is 'low', ranking 74th worldwide.¹²⁰

“ I want to experience living in a country with four seasons, meet new people from different cultures and backgrounds, challenge my adaptability and get a new perspective.”

Prospective UG student from Indonesia

Most interviewees felt that international experience is highly appreciated by employers. Studying abroad for a degree is valuable, as it can enhance individuals' expertise, improve communication skills, expand their professional network with contacts from around the world, and increase their **employability** at home.

“ By having an international degree, I will find it easier to reach a broader network and prove to future employers that I can work in a multicultural environment.”

Prospective UG student from Indonesia

WHAT MATTERS TO INDONESIAN STUDENTS WHEN SELECTING A STUDY DESTINATION?

Funding is a key consideration for both parents and students. Tuition fees, living costs, scholarship availability and employment opportunities during the degree are the primary concerns of Indonesian students and parents. Many students therefore apply for the Indonesian government's scholarship (LPDP). According to one prospective PG student, scholarships from the Indonesian government can be very prescriptive with regard to which universities students can choose, and can therefore have a heavy influence on the study destination decision.

Most alumni and one recruitment agent mentioned that, in addition to financial considerations, **rankings** were highly influential, as they are regarded to reflect the quality of education at that institution.

Living arrangements and lifestyle in the study destination also influenced interviewees' decision. For instance, interviewees cited availability of student accommodation, awareness of the existence of a large Asian community in the destination of choice, and acceptance of different backgrounds, faiths, and of women in the study destination as factors in their choice. Experiences of family members and alumni, as well as advice from institutional representatives, also had an impact, helping prospective students to gain an understanding of the culture and lifestyle in the selected country.

“ Apart from the quality, it was important to think about safety. I compared it with other cities from my shortlist, in terms of safety, particularly for someone who doesn't have a family there.”

PG student from Indonesia

Finally, interviews showed that post-study work opportunities are valued by Indonesian students but not a decisive factor. Most alumni said they would have liked to stay in the UK but were required to return home as per their scholarship contract. Others who were able to stay mostly stayed for a few months after graduation before returning to Indonesia.

“ For me, post-study work opportunities in the UK weren't as important as they would be for other people. But I think they are extremely important in general. This is the point of studying for a degree, especially abroad.”

PG student from Indonesia

WHY AREN'T WE SECOND IN INDONESIA?

According to the data, **Australia** was the top study destination for Indonesian students in 2018. Interviews revealed that the country is attractive not only because of its high quality of education but due to its geographical proximity, the availability of Australian-funded scholarships, and its post-study work opportunities and routes to permanent residence. Also, prospective students mentioned that Australia was perceived as very diverse and safe.

“ Australia is opening scholarships, and I do not want to rely on Indonesian government scholarships.”

Prospective PG student from Indonesia

After the US and Japan, **the UK** is the fourth-preferred country for Indonesian students. Its low position is primarily because it is comparatively expensive and offers limited financial support, according to interviewees, but it is also geographically far. However, the UK is regarded as a study destination of choice for Indonesian students receiving government sponsorship. Interviewees reflected that the UK's high-quality education system is highly attractive, as is the availability of one-year postgraduate degree programs, which compensate for the limited funding opportunities and the difficulty of staying in the UK after graduation. Also, the ease of access to student visas and the smooth application process are seen as positive points in the UK's favour. Finally, the UK is perceived as very welcoming to Indonesians, since there is a large South Asian diaspora in its big cities, and students feel safe thanks to the diversity on campus and public places in general.

“ The UK is perceived as an attractive study destination, the most attractive for all interviewees. According to the rankings, UK institutions are globally renowned and very multicultural, diverse, but with old and rich traditions.”

PG student from Indonesia

Germany has recently increased in popularity, especially with self-funded students, due to the low tuition fees and its excellent reputation in technology. Germany had the fifth highest market share of Indonesian students in 2018.

HOW CAN THE UK DEVELOP A STRONGER MARKET POSITION IN INDONESIA?

The UK has become increasingly popular among Indonesian students, but there are clear recommendations from Indonesia students on how the UK can further improve its position. All participants mentioned that the UK is comparatively expensive and suggested more financial support **through a wider variety of scholarships**. Several Indonesian students explained that they do not want to rely on their government's scholarship and that places for the Chevening scholarship are very limited.

“ *Chevening is perceived as a very selective scheme. I think a variety of available scholarships, not only by the Indonesian government, would be very helpful.”*

PG student from Indonesia

Another common observation was the **limited availability of information** about living conditions and work opportunities for prospective students, as many postgraduate students want to bring their family for the duration of their degree.

Several respondents mentioned that **strengthening the relationship between the UK and Indonesia** and promoting the UK's culture to Indonesians would be beneficial for the UK's attractiveness as a study destination. Increased promotion of the UK's culture and tradition to Indonesians is perceived as a soft diplomacy.

“ *I think the UK government must improve the soft diplomacy skills, like the Japanese and the Koreans, through music, TV and drama. I was attracted to the UK because of the novels. The UK should promote the country to people as early as possible, from seven to ten years old, through movies, novels, etc. When prospective students debate between the US and the UK, they will choose the UK. We were bombarded by the Hollywood movies, we speak like Americans, but we admire the UK, the culture, the business, the communities, the society.”*

PG student from Indonesia



SOUTH KOREA

OVERVIEW

South Korea (officially, the Republic of Korea) has a population of 51.8 million and saw an average population growth of 0.2% per year over the period 2016 to 2020. In 2020, South Korea's population fell for the first time in the country's history owing to an ageing population and a chronically low birth rate.¹²¹

South Korea has achieved remarkable economic growth over the past several decades. It ranked as the world's 10th largest economy in 2021, with a GDP of \$1.63 trillion.¹²² As such, South Korea is categorised as a 'high-income OECD' nation by the World Bank. Its economy is largely supported by its industrial and services sectors. Its key industries include textile, steel, car manufacturing, shipbuilding and electronics. South Korea is the world's second largest producer of semiconductors.¹²³

As a result of the Covid-19 pandemic, South Korea's economy shrank by 1% in 2020, its worst contraction since 1998. This contraction was driven by muted export activity within important heavy industries such as chip and other electronic manufacturing.

10th largest economy with

US\$1.6tr

GDP in 2021



South Korea has a population of

51.8m

in 2020



NATIONAL DEVELOPMENT STRATEGY

In July 2020, the South Korean government announced the Korean New Deal, a national development strategy to support the country's recovery from the Covid-19 pandemic and lead global action against structural changes. Through this deal, the government plans to invest in 25 key projects by 2025, as well as immediate projects that are estimated to create 550,000 jobs.¹²⁴

The plan consists of two main parts:

- 1. The Digital New Deal** which focuses on strengthening DNA (data, networks and Artificial Intelligence), digitalising 'social overhead capital' and fostering non-contact industries.
- 2. The Green New Deal** which focuses on the green remodelling of urban space and infrastructure, creating innovative green businesses and industries, and expanding low-carbon distributed energy sources.

The digitalisation of South Korea's education infrastructure is a key feature of the Korean New Deal. This involves expanding digital infrastructure and educational materials to incorporate a blend of online and offline methods into all learning environments including elementary, middle and high schools, universities and job training institutions. To set the basis for online learning, 10 remote education support centres for shared use by universities will be installed, and to build the digital skills of faculty members, 28 training centres will be created.¹²⁵

HIGHER EDUCATION

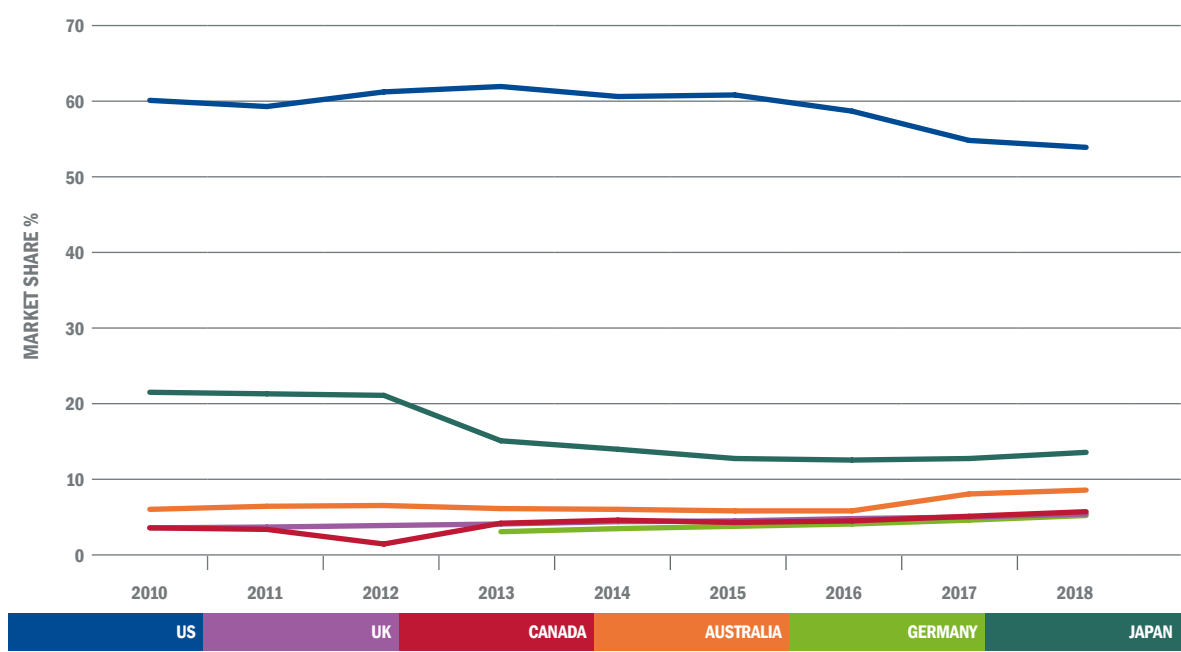
South Korea is an aging society with a low birth rate. The country's population is projected to shrink by 13% to 42.3 million by 2050.¹²⁶ As a result, the country's university-age population is steadily shrinking.¹²⁷ Nevertheless, South Korea is currently home to one of the most educated populations in the world and consistently ranks among the highest-performing countries in international educational assessments. English is mandatory from grade 3 in elementary school and English proficiency is 'moderate', ranking 32nd in the world and fourth in Asia.¹²⁸ According to the OECD, 70% of 24 to 35-year-olds in South Korea have completed some form of tertiary education – the highest percentage worldwide and more than 20 percentage points above comparable attainment rates in the United States.¹²⁹

The government supports Korean students to study overseas through the Korean Government Scholarship Program for Study Abroad. This scholarship scheme was established in 1977 and is available for students pursuing postgraduate-level studies. Selected awardees receive support for flight tickets and tuition fees.¹³⁰

WHY DO SOUTH KOREAN STUDENTS CHOOSE TO STUDY ABROAD?

In 2018, **98,824** students, or **1.8%** of all South Korean tertiary students, pursued degrees abroad.¹³¹ The top study destinations were the USA, Japan, Australia, the UK and Canada. The ranking order of the top three destinations has not changed since 2010, while the UK and Canada have vied for third and fourth place. The top countries' market shares have varied little since 2013 (see **Figure 15**).

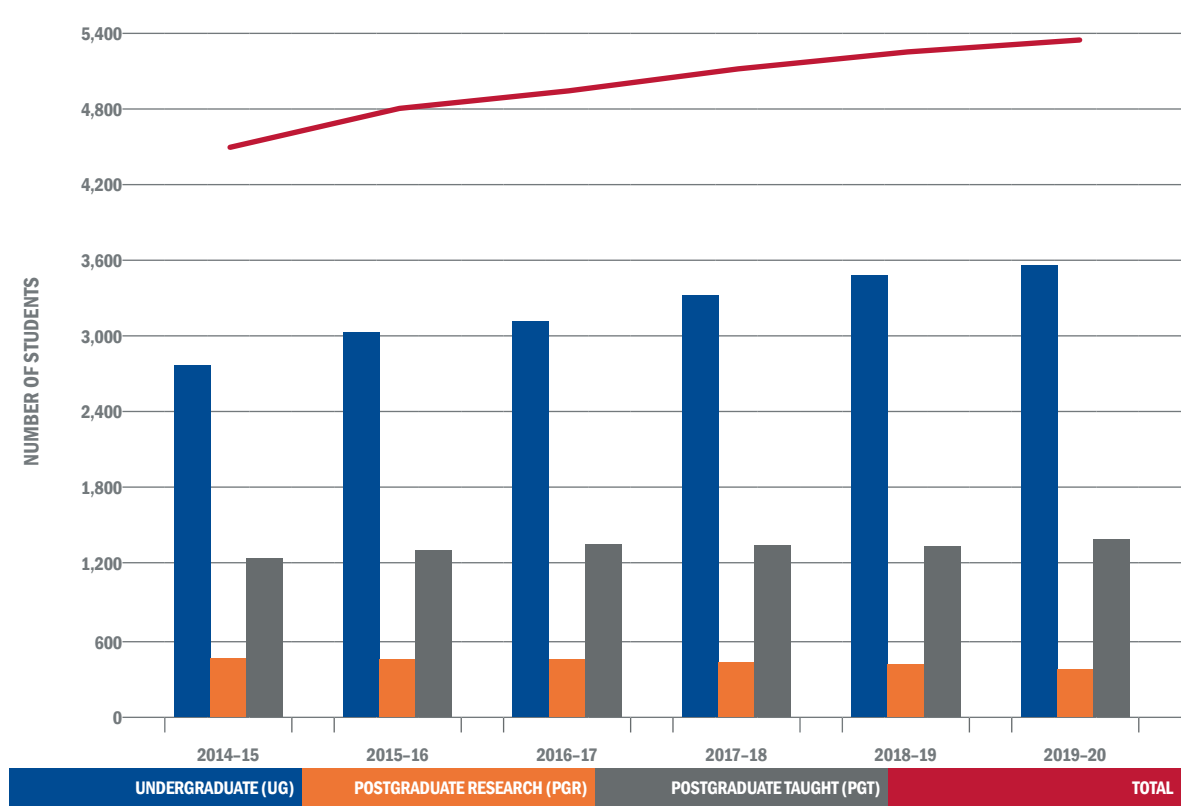
FIGURE 15: MARKET SHARE CHANGES IN SOUTH KOREA (2010–2018)



Data source: UIS.Stat, June 2021

Figure 16 shows the numbers of South Korean students in the UK over the last six years. In 2019–20, the three top subject areas for South Korean students in the UK were creative arts and design, business and management, and social sciences. In the same year, **81.0%** of postgraduates and **91.4%** of undergraduates used private sources to fund their tuition fees in the UK, while **9.2%** of postgraduates and **4.0%** of undergraduates accessed provider waivers or awards.¹³²

FIGURE 16: NUMBERS OF FULL-TIME SOUTH KOREAN STUDENTS IN THE UK (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

The domestic higher education system is of high quality and is characterized as very selective, so interviews showed that the main influencing factor for South Koreans who wish to study abroad is the opportunity to access **high-quality education in a top-ranked institution**. Rankings inform Koreans' understanding of the quality of a university or a course. The better the reputation of the institution, the higher the value of the degree for the students.

Other reasons for pursuing a degree abroad include improving English-language skills, experiencing new teaching and learning methods, and exploring a new culture. Such experiences are seen as boosting career prospects.

WHAT MATTERS TO SOUTH KOREAN STUDENTS WHEN SELECTING A STUDY DESTINATION?

Interviews demonstrated that a key consideration for South Korean students is **affordability**. A recruitment agent reported that students first ask about scholarships or other options for external funding: 'Students are interested in the funding aspects, too. They ask about scholarships or funding they could get. The price for the final decision is a key consideration.'

In addition, the quality of education matters and is assessed through the reputation and ranking of the specific institution. Interviewees observed that professors and teachers influence students' choices, as their experiences can help shape their understanding of quality courses worth pursuing and expected outcomes after graduation.

The availability of a post-study work visa is also valuable for Korean students. Many wish to remain in the study destination after graduation to experience the working culture, enhance their skills and knowledge, and gain practical experience in an international environment. Ultimately, however, most students want to return to South Korea and apply their expertise at home.

“ *Post-study work opportunities are a very important factor. It is generally interesting for students. If postgraduate students can remain there for two years with their family – it is a strong factor. Undergraduate students used to think they would move to other countries in Asia and Europe after completing the degree in the UK.”*

Recruitment agent from South Korea

WHY AREN'T WE SECOND IN SOUTH KOREA?

For South Korean students, the country of choice is the US, which attracts between 53% and 61% of internationally mobile Korean students annually. Interviewees said they valued the excellent reputation of US institutions and courses, which they hope will guarantee career success. A recruitment agent also pointed out that due to the large diaspora population, many South Koreans have family in the US, which can influence their decision:

“ *The most attractive is definitely the US. The number of Korean students in the US is ten times higher than in the UK. The attraction for the US is based on word of mouth. Also, many students have family or friends somewhere in the US. So, that gives them some safety. They like to settle in the US, if they have a family there, they would like to live together or at least near each other. This would affect the choice of institution.”*

Recruitment agent from South Korea

Japan is ranked second and is seen as highly attractive, despite a 7.8% decrease in market share between 2010 and 2018. Courses at Japanese universities are considered high quality, and some students appreciate the geographical proximity to home, as well as a sense of familiarity with the cultural traditions and heritage of Japan.

Studying in **Australia** is also popular among Korean students. The main factors driving this are the availability of highly ranked courses and institutions, access to scholarships and funding, and the possibility of a post-study work visa after graduation.

The UK is the fourth most popular destination for Korean students and its reputation for higher education 'is phenomenal' (UG student from South Korea). Korean students appreciate that UK universities offer highly ranked programs and prestigious degrees, with less stringent entry requirements than South Korea or the US. However, interviews showed that there is a lack of knowledge about the quality of UK higher education and some prejudice around friendliness and the welcome one can expect in the UK.

“ For undergraduate students, the UK is more open-minded for average performing students than the US. I compare the US and the UK because many students compare them. In the US, an average performing student can only go to average universities. In the UK, they have a chance of going to a Russell Group university. They can get into a higher ranked institution with a medium grade in the UK.”

Recruitment agent from South Korea

HOW CAN THE UK DEVELOP A STRONGER MARKET POSITION IN SOUTH KOREA?

Overall, mobility from South Korea to the UK is increasing, and the popularity of UK institutions is growing amongst prospective students due to positive feedback from alumni.

However, to make the UK a more attractive study destination for Koreans, all interviewees suggested enhancing the **availability of information about the quality and diversity of UK higher education**, promoting employment opportunities and showcasing individual universities, as there is still a lack of awareness of the diversity and high quality of UK institutions.

“ As a country, I know that UK universities are highly ranked and the quality is very, very good, but students cannot get much information about that. There is generally not enough information about the quality of UK education. The British Council events should return. They used to have lots of events, but not anymore.”

Recruitment agent from South Korea

Additionally, interviewees reflected that more **funding opportunities** or fee waivers from the institutions could attract more South Korean students, especially at undergraduate level.



VIETNAM

OVERVIEW

The Socialist Republic of Vietnam has a population of 96.5 million and saw an average population growth of 1.0% per year over the period 2016 to 2020.¹³³ Vietnam's 2019 census demonstrated improved intellectual standards, sharp increases in literacy and impressive school attendance rates over the last decade.¹³⁴ While the census reports that 55.5% of the population is under 35 years of age, Vietnam is projected to become an aging society around 2035.¹³⁵

Vietnam has achieved impressive levels of economic growth since the beginning of the process of economic reforms known as Doi Moi, which began in 1986. Vietnam ranked as the world's 37th largest economy in 2021, with a GDP of \$340.6 billion.¹³⁶ It is categorised as a 'lower-middle income' nation by the World Bank and its economy is based on large state-owned industries such as textiles, food, furniture, plastics and paper, as well as tourism and telecommunications. In 2020, agriculture represented 14% of GDP and employed 36% of the total workforce.¹³⁷

Despite the Covid-19 pandemic, Vietnam's economy has remained resilient, expanding by 2.9% in 2020 – one of the highest growth rates in the world. According to the IMF, growth is projected to recover to 6.5% in 2021 owing to strong economic foundations, decisive containment measures and well-targeted government support.¹³⁸

World's 37th largest economy

US\$340bn

GDP in 2021



Vietnam's population was

96.5m

in 2020



NATIONAL DEVELOPMENT STRATEGY

In 2016, the Vietnamese government and the World Bank jointly launched the Vietnam 2035 report, laying out development strategies aimed at transforming Vietnam into a high-income or upper-middle-income country by 2035.

Vietnam 2035 is based on three pillars of development:

1. Prosperity with environmental sustainability
2. Equity and social inclusion
3. A capable and accountable state¹³⁹

As recommended in the strategy, Vietnam's path toward prosperity by 2035 calls for continuous increases in productivity and annual growth of 7%. Achieving this will depend significantly on the higher education sector's capacity to produce the qualified and competent individuals needed to support the country's economic development strategy. To support this, the Ministry of Education and Training aims to develop a Higher Education Strategy/Master Plan 2021–2030 and establish a transformative agenda. The aim is to reform higher education institutions, especially institutional governance, financing and specific programs, and create incentives to enhance the quality and relevance of higher education.¹⁴⁰

HIGHER EDUCATION

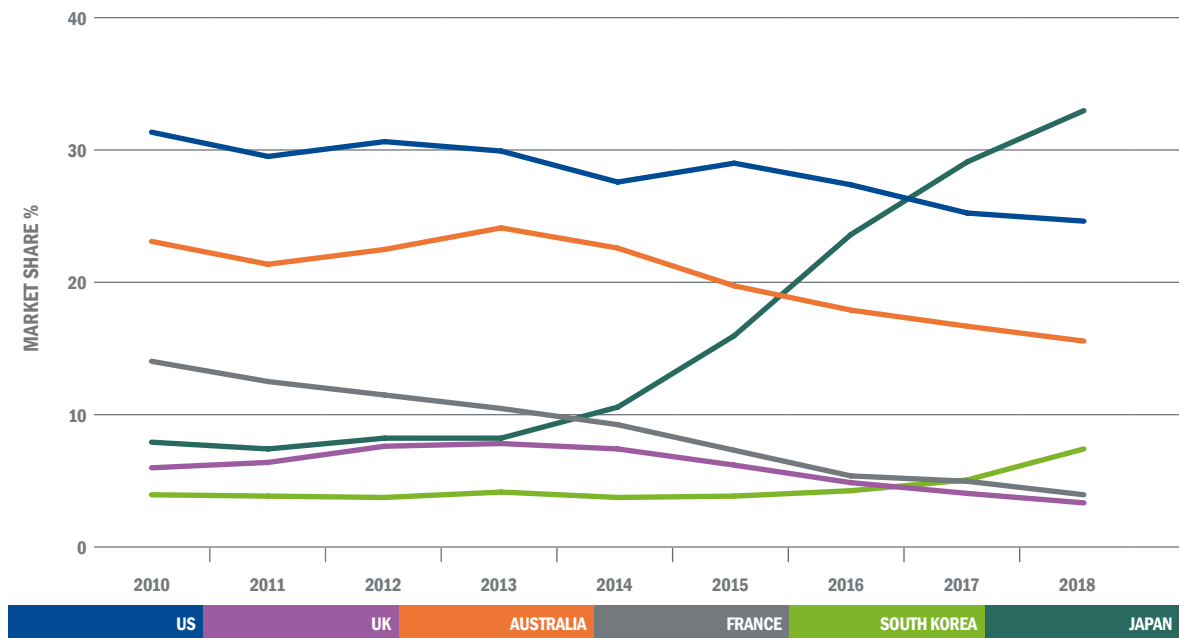
The Vietnamese higher education system has undergone massive expansion and reform over the past 15 years, overseen by the Higher Education Reform Agenda (HERA) 2005–2020. HERA was a response to Vietnam's rapid economic and demographic growth in the preceding decades. It aimed to address two problems: the low quality of teaching and research, and limited access to higher education. While progress in these areas has been made, the tertiary education system currently fails to meet demand for high-quality degree programs.¹⁴¹

While access to higher education has more than doubled since 2000, student enrolment has stagnated since the early 2010s largely due to a government policy that puts a break on quantitative growth in student numbers. Currently, Vietnam's tertiary education enrolment is below that of 2010, and the corresponding gross enrolment rate is 28% – one of the lowest in East Asia. The government significantly revised the 2020 enrolment targets downwards, from 4.5 million to 2.2 million.¹⁴² The Vietnamese government announced plans to produce 7,300 more lecturers with doctoral degrees and more than 300 with a Master's degree in culture, arts, physical training and sports, through full-time training in Vietnam, overseas, or both in Vietnam and overseas. These plans are part of Project 89, which aims to improve the capabilities of lecturing and managerial staff at tertiary education establishments to meet the requirements for fundamental and comprehensive reform in education and training in the 2019–2030 period.¹⁴³

WHY DO VIETNAMESE STUDENTS CHOOSE TO STUDY ABROAD?

Outbound mobile students from Vietnam constituted **1.9%** of all Vietnamese tertiary students in 2018.¹⁴⁴ That year, the dominant study destinations were Japan, the US, Australia, South Korea and France. The UK ranked **sixth**, with a market share of **3.3%** (see **Figure 17**).

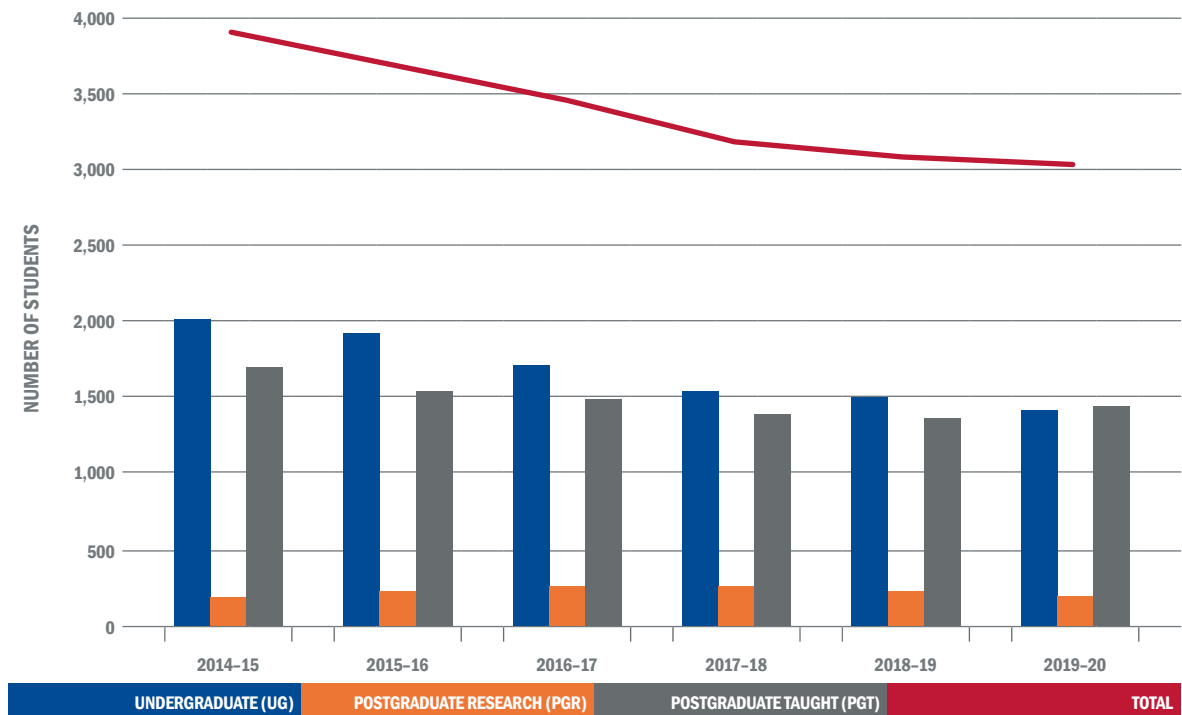
FIGURE 17: MARKET SHARE CHANGES IN VIETNAM (2010–2018)



Data source: UIS.Stat, June 2021

Figure 18 shows the numbers of Vietnamese students in the UK from 2014–15 to 2019–20. In the 2019–20 academic year, the three most popular study areas for Vietnamese students at all levels in UK institutions were business and management, engineering and technology, and social sciences. While **68.1%** of postgraduate and **89.3%** of undergraduate students covered their tuition fees via private sources, **16.0%** of postgraduates and **5.3%** of undergraduates benefitted from a fee waiver or provider award.¹⁴⁵

FIGURE 18: NUMBER OF FULL-TIME VIETNAMESE STUDENTS IN THE UK (2014–15 TO 2019–20)



Data source: HESA Student record 2014-15 to 2019-20

Interviews with Vietnamese alumni revealed that Vietnamese students choose to study abroad because access to higher education is not always easy. For instance, the nearest university offering the desired programme could be several hours' flight away, or require an entry exam for studying at postgraduate level.

“ *I think my reasons were the difference between the education systems in Vietnam and other countries. In Vietnam, you have to take a complicated exam to study at the Master's level, whereas it is easier to apply to programmes abroad.*”

PG student from Vietnam

A recruitment agent in Vietnam explained that additional reasons for studying abroad include better **career options and the opportunity to get permanent residence** in another country. Prospective students also emphasised the opportunity to broaden their horizons, being educated in a more 'academically rigorous' environment and getting access to more specialist and diverse courses than the ones at domestic institutions. That would equip them with skills and knowledge considered unconventional within Vietnamese society and boost their career prospects at home.

“ Vietnamese students want to get overseas experience, and their parents want their children to get better employment opportunities. But parents also send their children abroad, so they have a chance to immigrate.”

Recruitment agent in Vietnam

WHAT MATTERS TO VIETNAMESE STUDENTS WHEN SELECTING A STUDY DESTINATION?

According to interviewees, Vietnamese students generally prefer English-speaking destinations, as this allows them to improve their language skills; even though English is mandatory from grade 3, English proficiency is rated low, with the country ranking 65th worldwide on the EF English Proficiency Index.¹⁴⁶

Additionally, the decision is based on **safety** and **affordability**. As parents play a role in the decision-making process, they want to make sure that their children are safe. Interviewees also said that concerns about anti-Asian sentiment, which has been widely covered by the media in Vietnam, have increased in the last year.

Tuition fees and living costs are a big concern for students and their parents. The availability of scholarships was rated particularly important for most interviewees when selecting a study destination.

“ Their first questions are about the safety of the country, then tuition fees and living costs and then they ask for scholarships, which are important for Vietnamese families.”

Recruitment agent in Vietnam

Employment opportunities are also important, as part-time employment can help students gain some additional money to support themselves. Post-study work opportunities and even permanent residence in a Western country are very popular, even prestigious, in Vietnam. Parents are keen for their children to have a better life and therefore encourage them to choose destinations with employment or immigration opportunities, but prospective students also considered this 'an amazing chance'. When the costs and the quality of the degree are comparable, the **visa process** may play a role in decision-making.

“ With the new Graduate route, I will take advantage of the two years after I graduate to find work opportunities in the UK. It is a policy that helps me prefer a country more when choosing a destination to study abroad.”

Prospective UG student from Vietnam

WHY AREN'T WE SECOND IN VIETNAM?

In interviews, the **US and Australia** were cited as popular destinations because of their large Vietnamese communities and excellent educational quality. In addition, Australia has a strong post-study work offer that can facilitate permanent residence.

“ *I think the most attractive are Australia, Canada, the US and then the UK. Australia is close to Vietnam, it is only a six-hour flight, and there are large Vietnamese communities in Sydney and Melbourne, and it would be easy for students to find a part-time job. Also, students can stay after their studies.”*

Recruitment agent in Vietnam

Canada has become increasingly appealing to Vietnamese students. Participants saw Canada as a developed country with high-quality institutions and various courses available. Like Australia, the Canadian visa and immigration system allows graduates to apply for permanent residence permits, which is attractive to students and their parents.

Interviewees agreed that UK higher education is excellent, and it is particularly attractive to students who are looking for one-year degrees. While alumni said they were fascinated by the UK's culture, society and history, they also mentioned that the UK is perceived to be the most expensive country in the world, and highlighted some prevalent negative perceptions of the country:

“ *I am sorry to say this, but the perception is that the British are cold as ice, and they [students] are worried about experiencing racism. They are worried about the cold character. I try to change that perception a little by telling them about my great experience in the UK and that racism is a global problem.”*

Recruitment agent in Vietnam

HOW CAN THE UK DEVELOP A STRONGER MARKET POSITION IN VIETNAM?

Limited access to higher education at home, a strong interest in English-speaking study destinations, and the comparative advantage of short postgraduate degrees make the UK generally an attractive destination to Vietnamese students.

However, for the UK to attract more students from Vietnam, interviewees recommended targeted media campaigns to inform Vietnamese students and their parents about the diversity and affordability of the UK and reassure them that the UK is a welcoming and open country.

“ *Maybe advertisements about studying in the UK could be improved and make clear that the UK is not that expensive. A lot of people think studying in the UK is more expensive than in the US or Australia. It would be helpful if students had more information about the living costs, tuition fees and visa fees.”*

PG student from Vietnam

All interviewees suggested increased **financial support**, for example, through targeted scholarships for Vietnamese students. Assistance with Covid-19-related costs, such as quarantining and testing, was also mentioned. Several alumni and prospective students also suggested support with finding accommodation.

CONCLUSION

In conclusion, the data broadly confirms the four main factors that influence students' study destination decisions: financial factors, welcome and safety, educational quality and employment prospects. However, there were slight but important variations in each country:

NIGERIA

- Nigerian students choose to study abroad because they hope an **internationally recognised degree** will provide them with more opportunities and a better life.
- When deciding on a study destination, Nigerian students prioritise **cost-effectiveness** and their decision is mainly influenced by the **availability of external funding** and **post-study work opportunities**.
- The UK could increase its attractiveness as a study destination by **promoting the Graduate route**, offering **increased financial support** and involving more alumni in the recruitment process.

SAUDI ARABIA

- Students from Saudi Arabia choose to study abroad to **develop personally and professionally** to boost their careers.
- When deciding on a study destination, the top influencing factors for Saudi national students are **welcome, safety and educational quality**, as determined by the government's recommended list of universities.
- The UK could increase its attractiveness through a targeted communication strategy emphasising the **UK's welcoming and multicultural population, regions and cities** and **demonstrating universities' unique selling points**.

INDIA

- Indian students choose to study abroad to **enhance their skills and knowledge to increase their employability**.
- Indian students mainly select their study destination based on **educational quality, affordability and post-study work opportunities**.
- The UK could become a more attractive study destination by continuing to **promote the Graduate route** and offering **more scholarships or even loans**.

PAKISTAN

- Pakistani students choose to study abroad because they want to **develop new ways of thinking** and learn from other countries. The domestic labour market is very competitive, and they hope to **gain a competitive edge** through an overseas degree.
- Return on investment matters most to students and they primarily select their study destination based on **available funding and post-study work opportunities**.
- The UK could become more attractive by continuing to **promote the Graduate route** and offer **additional financial support**, such as low-income scholarships.

 **BRAZIL**

- Brazilian students choose to study abroad because they have a deep desire to **explore the world and new cultures**, meet new people and study a degree that meets their interests.
- Deciding factors for selecting a study destination are **affordability, quality of education and lifestyle**.
- The UK could increase its attractiveness as a study destination by **offering more scholarships (especially for low-income students)**, promoting the UK and showcasing its universities at fairs.

 **INDONESIA**

- Indonesian students choose to study abroad to get a **high-quality education** and **improve their employment options**.
- Indonesian students base their study destination decision mainly on the **availability of funding, living arrangements** and **post-study work opportunities**. Government-sponsored students are heavily influenced by the government's list of recommended universities.
- The UK could become more attractive by providing **more information about living and working in the UK** and **promoting the UK's culture**.

 **SOUTH KOREA**

- South Korea's education system is excellent but admission processes are tough, so Korean students choose to study abroad to get into a **comparable or better university** and gain **international exposure to improve their career options**.
- **Rankings and reputation** matter the most when selecting a study destination. **Funding opportunities** are also important factors, as are **safety** and **welcome**.
- The UK could become more attractive through **increased promotion of the UK higher education sector's diversity and excellence**, as well as providing **funding opportunities** specifically for Koreans.

 **VIETNAM**

- Vietnamese students choose to study abroad to **improve their employment options** and to obtain **permanent residency**.
- Parents are strongly involved in the decision-making process and concerns about anti-Asian sentiment remain. When selecting a study destination, **affordability** and **safety** are the main influencing factors.
- The UK could enhance its attractiveness through increased **financial support** and a targeted media campaign advertising the **UK's diverse population, cities and regions**.

CHAPTER 3: **RECOMMENDATIONS –** **HOW CAN THE UK** **DO BETTER?**

3

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KEY FINDINGS

Key findings identified by this report suggest that while the UK continues to be a highly appealing study destination for many internationally mobile students, there are a number of steps that the UK government and university sector could take to improve its attractiveness further.

Doing so will be imperative to ensuring the UK meets the targets set out in the recently published International Education Strategy, which include increasing the number of international students studying in the UK to at least 600,000 by 2030, but doing so in a way that targets a diverse range of source markets to ensure this growth is sustainable in the long term.

In order to achieve the strategy's targets in the area of student recruitment, the UK must:

- **remain competitive** in a changing international policy landscape
- **take action** to enable recruitment of a more diverse cohort of international students
- **improve** the marketing of the UK as a study destination

Specifically, there are four key recommendations on which the UK government and the university sector should collaborate to meet the requirements above.

1. Improve the promotion of the UK as a welcoming, diverse and accessible study destination.

Awareness of the UK as a study destination is low in a range of countries, especially Brazil, Indonesia, Saudi Arabia, South Korea and Vietnam. Working together, the government and the sector should improve both the way the UK is promoted at a national level, including but not only through the Study UK campaign, and improve the geographical coverage (including EU countries) of promotional campaigns. These improvements should include:

- better coordination between the efforts of individual institutions and national branding and marketing campaigns, including Study UK, Scotland is Now and Study in Wales
- promotional delegations that have media and student-facing activities at the heart, including promotion of the Graduate route, led by the International Education Champion and UK government
- maintaining the evidence base on the UK's competitive advantage, including outcomes of its international graduates

2. Ensure the success of the Graduate route.

The Graduate route is essential to the UK's competitiveness in international student recruitment, and its continued promotion is necessary in countries such as Nigeria, India and Pakistan. Working together, the UK government, the sector and institutions should:

- continually promote the Graduate route following its launch this summer, and improve its promotion in key countries
- develop ways to monitor the implementation and uptake of the Graduate route
- work with the business sector to promote it to students and UK employers
- develop a strategic institutional approach to supporting the employability of international students and graduates, informed by the views of careers professionals and international students, with ownership at a senior level, and supported by clear objectives and measurable KPIs
- fund a pilot programme that will develop and roll out an International Graduate Export Placement Scheme which will allow UK businesses to draw on the language, technical skills, local expertise and networks of recent international graduates to realise new export opportunities

3. Reduce financial barriers for international students through the creation of more diverse and innovative funding opportunities.

Most top sending countries, including Brazil, India, Nigeria, Pakistan, Indonesia and Vietnam, are price-sensitive markets and demand for financial support is high. The UK already offers a range of scholarships to international students, but there are no easy routes to find UK government and provider scholarships. Working with the sector, the government should therefore:

- create a national scholarship brand that could be used to promote existing scholarships, both university and sector/government co-funded, and increase the number of co-funded scholarships available
- pursue innovative government-to-government partner models for co-funding scholarships
- expand the UK government scholarship offer into key EU markets
- review visa costs to bring them in line with international competitors

4. Support the improvement of English language ability.

Especially in countries where the UK should develop its market position, such as Indonesia and Vietnam, English language skills and cultural relations with the UK are limited. The continuation or development of government-funded English Language Training (ELT) capacity-building projects would have a beneficial effect on student recruitment. The government should therefore:

- work with the British Council to develop a long-term strategic approach to market development through investment in English language education
- support the recovery of the UK-based English language sector, which has been severely affected by the Covid-19 pandemic.¹⁴⁷

APPENDIX A: METHODOLOGY AND LIMITATIONS

QUANTITATIVE DATA

The quantitative data for this report is drawn from two main datasets.

a) Higher Education Statistics Agency (HESA) Student record, which contains data on students registered at UK higher education institutions.

The data used in this analysis relates to UK-based, full-time students. All HESA figures relating to student numbers have been rounded to the nearest five, in accordance with HESA data protection protocols. All percentages have been calculated using raw figures and rounded, therefore rounded figures may not sum precisely. HESA Student records are the copyright of the Higher Education Statistics Agency Limited. Neither the Higher Education Statistics Agency Limited nor HESA Services Limited can accept responsibility for any inferences or conclusions derived by third parties from data or other information obtained from Heidi Plus.

b) UNESCO Institute of Statistics (UIS) higher education data, which tracks trends and contains details of students at the global, regional and national levels.

For this report, the UIS's series of indicators to track the number and rates of internationally mobile students was of particular interest. They reveal the shifting demand for higher education by showing where students go to study and where they come from. The UIS provides free access to data for all UNESCO countries and regional groupings from 1970 to the most recent year available.

The EF English Proficiency Index (EPI) was used to compare the level of English language skills in the selected countries. The EPI is produced by English First and based on test data from more than 2,200,000 participants who took the EF Standard English Test (EF SET) or one of their English placement tests in 2019. There are limits to the EPI's representativeness, as participants self-select into the study and there is a bias towards young people who have access to the internet and an interest in English-language study.¹⁴⁸

QUALITATIVE DATA

Data collection and analysis

The qualitative data for this report was collected by UUKi and IDP Connect between 4 March and 5 May 2021 through semi-structured interviews with recruitment agents (10), focus groups with alumni who completed a full degree in the UK and graduated in or after 2015 (54 individuals), and prospective students (25 individuals). Focus groups with prospective students were conducted for all countries except for Brazil and Nigeria, as interviewees were selected through convenience sampling via expressions of interest following the completion of the IDP Connect International Crossroads Survey IV.¹⁴⁹ UK alumni and recruitment agent interviewees were selected through convenience sampling via university contacts and the British Council. See **Table A1** for the characteristics of the interviewees and focus group participants and **Table A2** for the provider country of alumni.

Questions were tailored to each group, and aimed at understanding the decision process when choosing a study destination, the factors that influence this decision, and perceptions of the UK and other study destinations. Thematic analysis was conducted across all interviews to identify the key themes and considerations for each group.









TABLE A1: CHARACTERISTICS OF STUDENT, ALUMNI AND RECRUITMENT AGENT INTERVIEWEES			
COUNTRY	NUMBER OF PROSPECTIVE STUDENTS	NUMBER OF ALUMNI	NUMBER OF RECRUITMENT AGENTS
 BRAZIL	No interviews.	1 x UG 2 x UG and PG 3 x PG 1 x PhD 1 x MBA	1
 INDIA	3 x UG 4 x PG	1 x UG and PG 8 x PG 1 x PhD 2 x MBA	1
 INDONESIA	7 x PG	5 x PG	1
 NIGERIA	No interviews.	9 x PG 2 x PG and PhD	3
 PAKISTAN	3 x PG	1 x UG and PG 6 x PG	1
 SAUDI ARABIA	2 x UG 1 x PG	1 x UG 2 x PG 1 x PG and PhD 2 x PhD	1
 SOUTH KOREA	1 x PG	1 x UG 1 x PG	1
 VIETNAM	2 x PG 2 x UG	2 x PG	1
TOTAL	25 prospective students	53 alumni	10 recruitment agents

TABLE A2: NUMBER OF ALUMNI PER PROVIDER REGION	
PROVIDER REGION	NUMBER OF ALUMNI
ENGLAND (EXCLUDING LONDON)	4
LONDON	19
SCOTLAND	16
WALES	14
NORTHERN IRELAND	0
TOTAL	53

Limitations

Despite careful methodological planning and analysis of results, this research is not without limitations.

First, due to self-selection and the voluntary participation of interviewees, as well as the relatively small sample size per country, the research has limited generalisability. Participants volunteered to join a one-hour interview with no financial compensation, and may differ in their characteristics to those who did not participate in the research. For instance, respondents may have had a particularly positive or negative experience in the UK. The study did not control for differences in the characteristics of students that may have influenced the selection of the study destination. To address this shortcoming, the call for participants was shared via a range of platforms, such as alumni networks and social media, at UK higher education institutions in all four nations. The research team also ensured that at least one interview per country was conducted with a recruitment agent who has at least two years' experience in advising students on different English-speaking study destinations. Additionally, the prospective student focus groups aimed to include undergraduate and postgraduate applicants who were UK-bound or planned to go elsewhere at different levels of the decision-making process.

Second, because the research used qualitative in-depth and focus group interviews, it was susceptible to response bias, meaning participants may have responded inaccurately or falsely to questions, whether intentionally or accidentally. In this study, response bias could have occurred because many respondents did not speak English as a native language, and they might have understood questions differently to the interviewers' intended meaning. Interviewers therefore made sure to repeat the question if responses showed signs of misunderstandings or lack of clarity. Additionally, the responses may not truly reflect interviewees' views, perceptions or realities due to social desirability bias, that is, the tendency to answer questions in a way that will be viewed favourably by the interviewer or other participants. To mitigate the risk of response bias, participants were assured that their responses would be anonymised.

Third, qualitative research is subject to built-in bias, as the research teams' assumptions and personal evaluation inevitably impacted the design of interview questions, the transcription, coding and analysis of the interviews. To tackle this bias, the research questions were reviewed by a steering group and interviews and focus groups were conducted by various people across UUKi and IDP Connect.

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EXCHANGE RATES AS OF 14 JUNE 2021			
GBP1=			
 USD	1.41	 EUR	1.16
 AUD	1.83	 MYR	5.80
 CAD	1.71	 JPY	154.62
 NZD	1.97	 CNY	9.02

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