

IDP REPORT

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POLICY REPORT (UK)



EMERGING FUTURES 3

EXECUTIVE SUMMARY

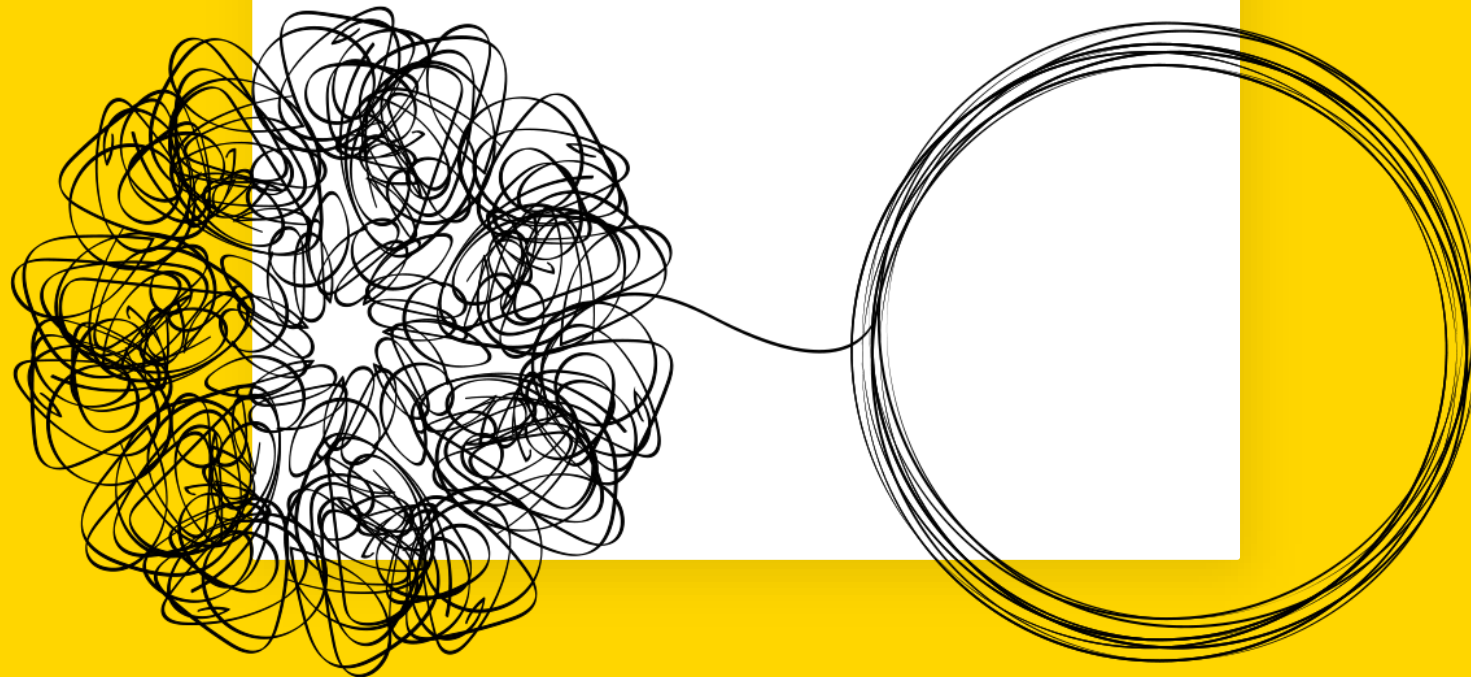
- Competition amongst the leading nations has intensified.
- Popularity of the UK has declined since the previous Emerging Futures (August 22) survey.
- Post-study work policies and opportunities are key if the UK wants to increase the volume of international students and grow the diversity of countries these students come from.
- Appearing to be a supportive, safe, and welcoming country is a key element to attracting international students and the UK is currently tracking somewhat behind Canada and Australia in this respect.
- The importance of post study work policies and access to graduate employment opportunities suggests that the UK should be reassuring students whilst reinforcing and promoting current policies to future students.





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METHODOLOGY



RESEARCH CONTEXT

A survey of prospective students, applicants, current and completed students

15 minute
survey



Administered
in English
and Chinese



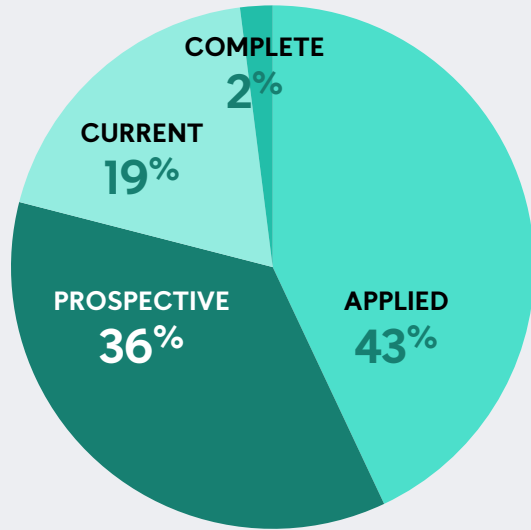
Conducted
between
27 February -
19 March, 2023



RESPONDENT PROFILE

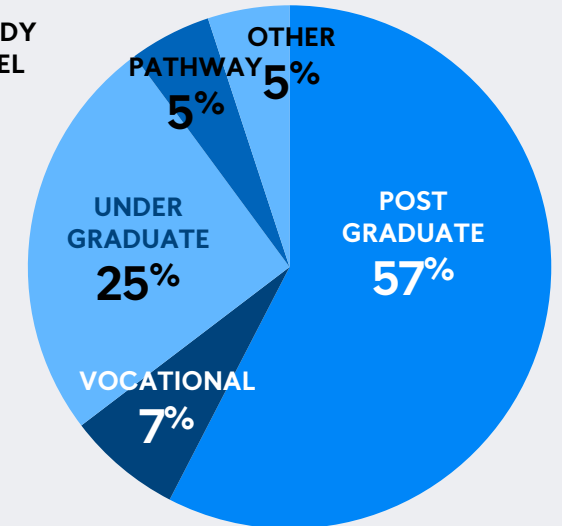
Our largest ever survey with 21,128 respondents from across the globe

STUDY STATUS



Respondents from 108 different countries

STUDY LEVEL



TOP 10 SOURCE MARKETS





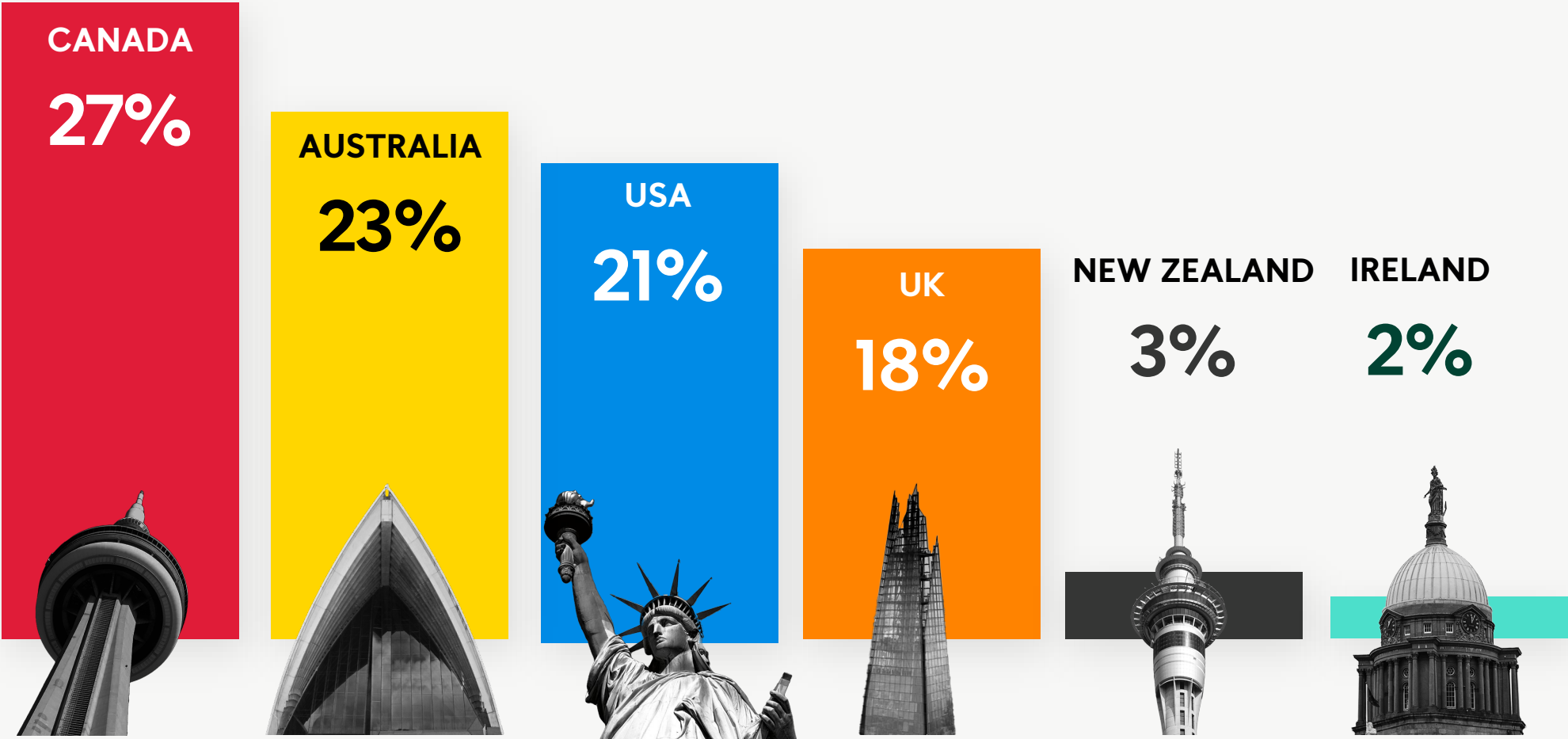
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CHOICES & MOTIVATIONS



FIRST CHOICE

Canada remains the most popular first-choice destination. However, with 34% of respondents stating that a minimum of three of the four leading study destinations are part of their consideration set, there is a great deal of competition.

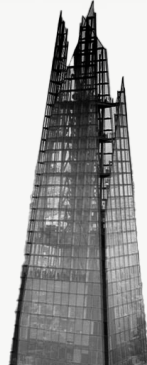
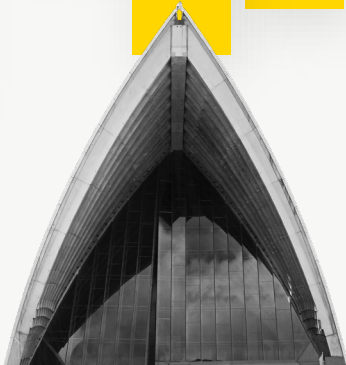
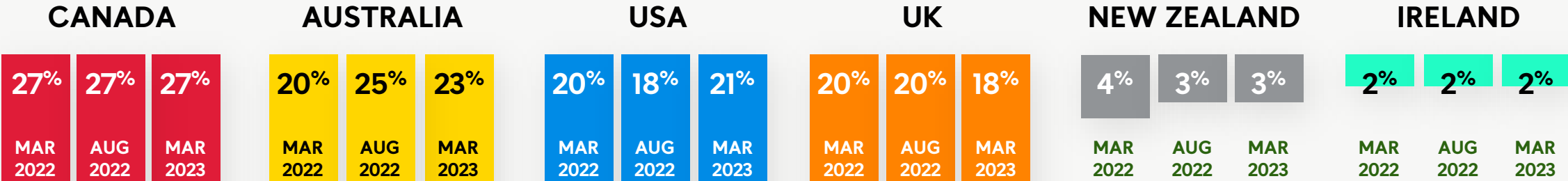


The percentage of respondents choosing the UK as their first-choice destination has declined in this latest survey.

In the previous surveys, in March and August 2022, 20% of students stated the UK was their first choice.

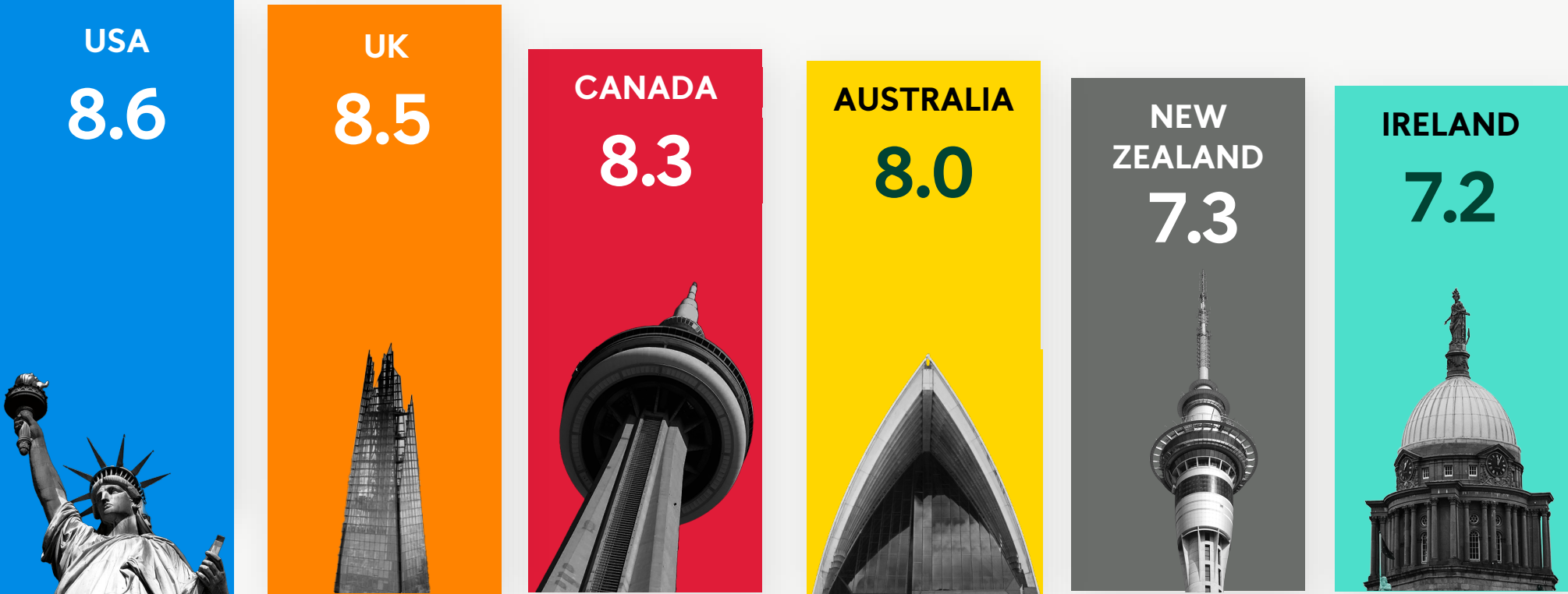
FIRST CHOICE OVER TIME

The US makes the biggest increase since Emerging Futures 2 in August 2022



PERCEPTIONS OF QUALITY

Students perceive the UK to have a high quality of education and predominately rely on institution rankings to judge quality



Students were asked to score each destination country on a scale of one to ten (with ten the highest) as to how they perceived the quality of education offered.

The UK received an average score of 8.5/10, just behind the USA but ahead of Canada and Australia. The UK is perceived to offer a high quality of education.



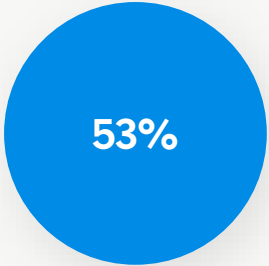
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POST-STUDY WORK

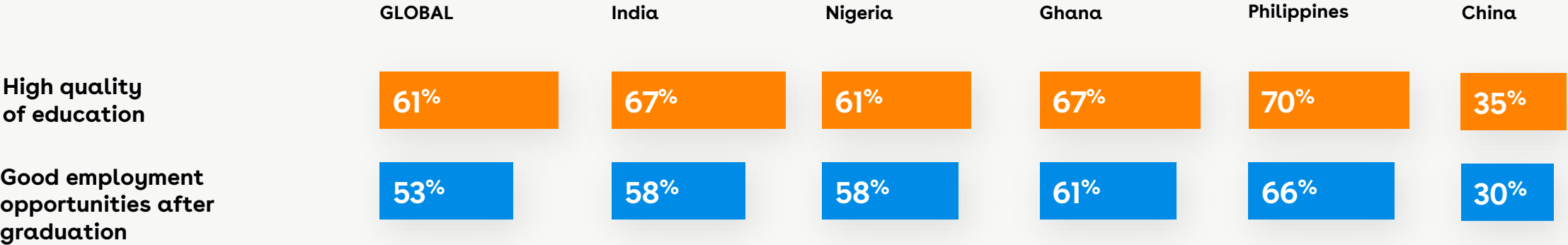


POST-STUDY WORK POLICIES DRIVING DIVERSITY

Post-study employment opportunities are a particularly important factor in choosing where to study for students. Having clear, positive, and well-marketed policies will therefore help to drive greater numbers of international students and greater diversity of demand.



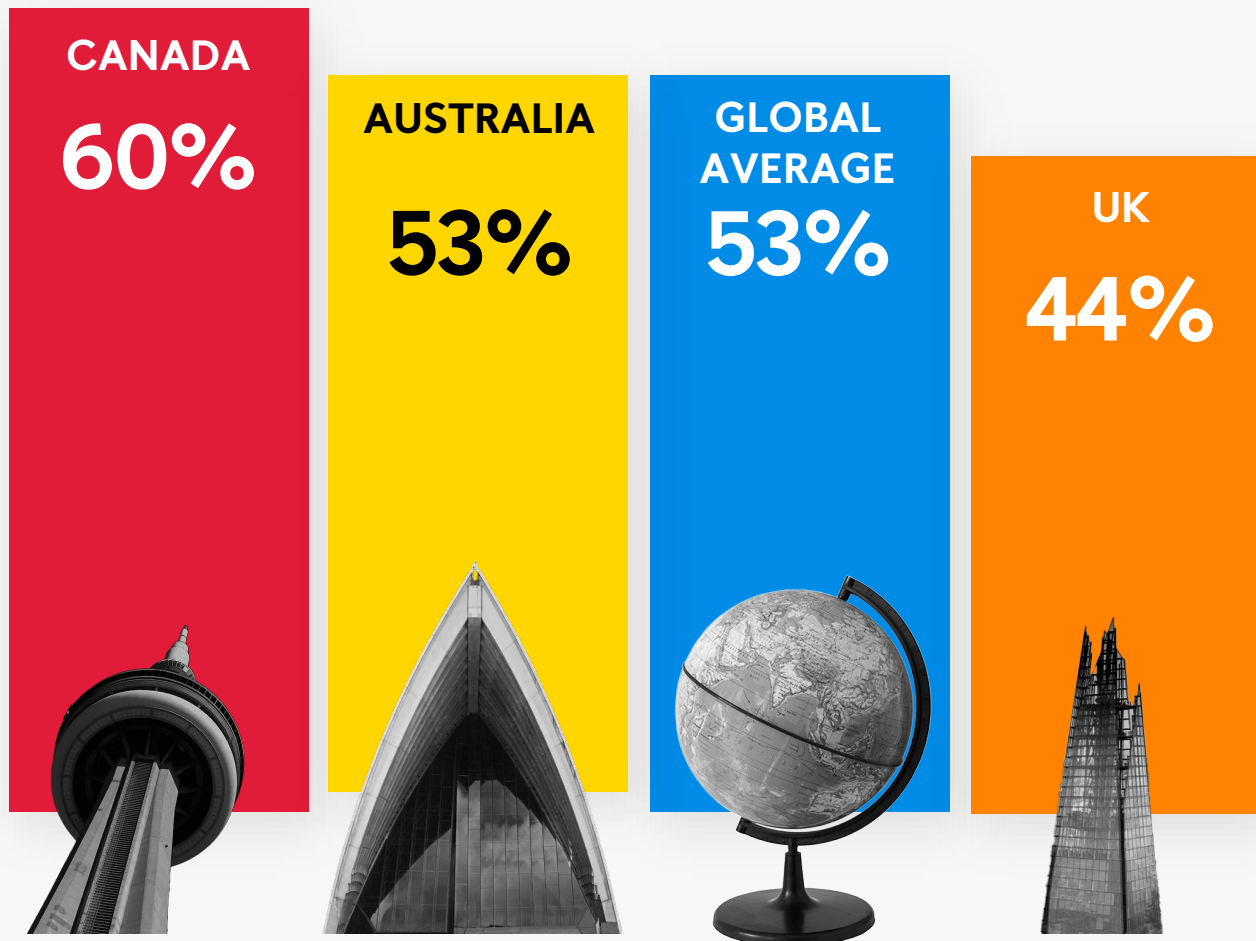
Globally, the percentage of students who say they chose their first-choice destination country due to availability of good employment opportunities after graduation.



While quality of education is the number one factor in choosing a destination, employment opportunities post study are a close second and particularly important for students from Philippines, Nigeria and Ghana.

THE ROLE OF POST-STUDY WORK IN STUDENT CHOICE

Looking at the data by preferred destination



When we filter the data to look at how decision-making factors change according to where the respondents first-choice destination is we see significant changes in the data.

The availability of good employment opportunities after graduation is a factor for a significantly higher percentage of students choosing Australia and Canada as their first-choice destination - **60% of students with Canada and 53% of student with Australia as their first-choice state it is a reason for choosing their destination (against the global average of 53%).**

For those choosing the UK as their first-choice, **44% state that good employment opportunities after graduation was a factor** - significantly lower than the global average.

THE ROLE OF POST-STUDY WORK IN STUDENT CHOICE

The opportunity to obtain work after graduation is a key driver for students when choosing where to study.

- 57% of respondents who chose to study in the UK stated that the availability of the Graduate Route was either the main or an influencing factor in their decision to study in the UK and 44% said that they would consider switching destinations if post-study work rights were reduced.
- This is a lower proportion than the global average of 64% of respondents who said post-study work is the main or influencing factor in where they study. We can surmise from these findings that it is therefore not as influential factor as it is for Australia and Canada, and this reinforces the earlier findings that the quality of education is a more important pull factor for those choosing the UK as their study destination.

The survey then asked students what features of the post-study work visa made it attractive. For the UK 69% of respondents and therefore the most attractive aspect of the visa is the opportunity to acquire work experience, this followed by the ease by which the visa allows entry into the job market and in third place is the duration of the visa.

How important was the availability of the Graduate Route in your decision making?

57%

For students choosing the UK -it was a main reason or influencing factor



44%

Globally said they would consider switching destinations if post-study work rights were reduced

What features of the post-study work visa offered by your destination made it attractive? (UK destination only)

69%

Opportunity to acquire work experience



57%

Easier entry into the job market

47%

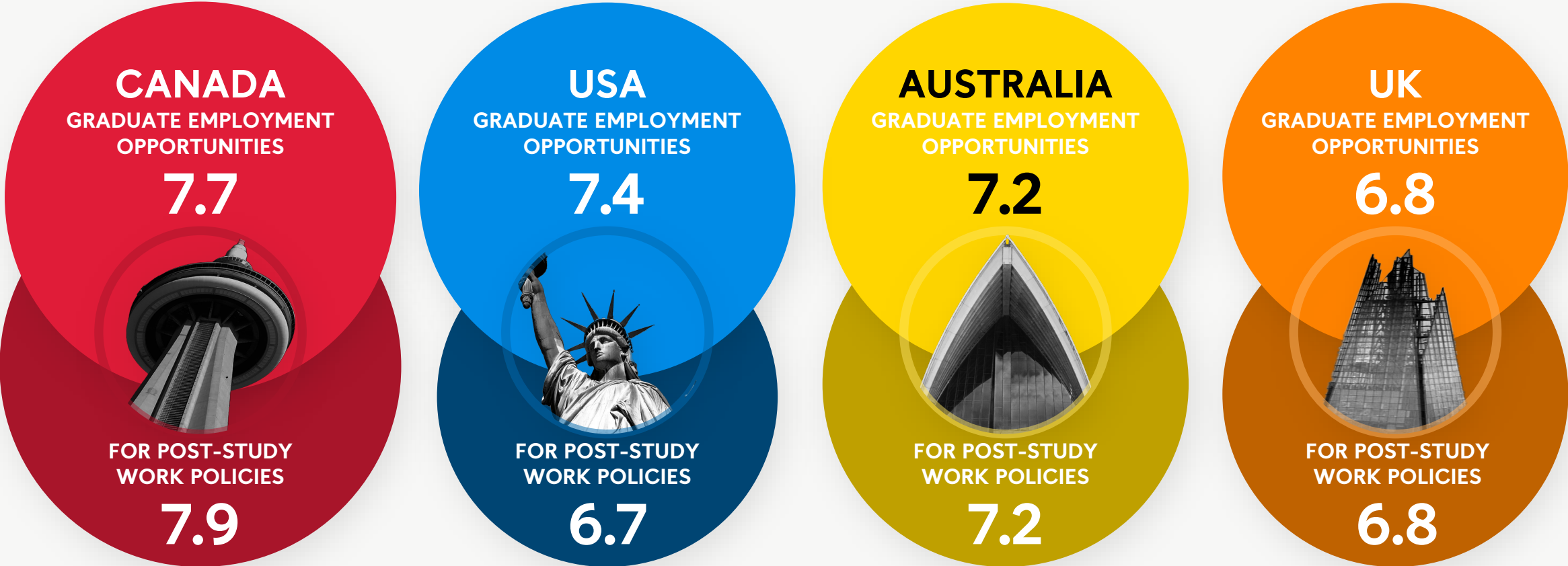
Duration of its validity



PERCEPTIONS RELATED TO POST-STUDY WORK

The UK's policy and work opportunities are not perceived as highly as other key destination countries.

All respondents were asked to rate each destination country on a scale of one to ten (with ten the highest) as to how they perceived both graduate employment opportunities and post-study work policies.



It is important to note that perceptions of the UK's post-study work policies have declined since the survey, that was conducted in March 2022, from 7.0 to 6.8. At the same time perception of the graduate employment opportunities has also dropped since last year, from 7.1 to 6.8.

CONCLUSION

Competition amongst the leading nations has intensified. To remain competitive the UK must promote the post-study work policies and opportunities in the UK.

Appearing to be a supportive, safe, and welcoming country is a key element to attracting international students and the UK is currently tracking somewhat behind Canada and Australia in this respect.

Having clear and well publicized post-study work policy will go somewhat to helping the UK appear welcoming and supportive as well as showing that students can fulfil their goals of gaining postgraduation work experience.

