



How Can Diversifying the UK's International Student Community Future Proof Learning for All?

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INTRODUCTION FROM METI BASIRI, CO-FOUNDER AND CMO OF APPLYBOARD



Millions of people around the world are currently considering whether or not they should embark on the experience of a lifetime—studying in a completely different country from where they grew up. Whether it's for a better education, to enhance their life experience, or for stronger career prospects, pursuing international study is never an easy decision to make.

However, the data is clear. The number of international students choosing to study in the UK is on the rise, and it's only set to continue increasing over the coming years. At the same time, the competition for top international talent is at an all-time high. Nations like the UK, the US, Canada, and Australia are competing for the best. The UK certainly has many things going for it: a top-tier higher education system, a sound economy, and a history of welcoming newcomers. But the country is also facing shifting student needs, an increasingly complex geopolitical landscape, and the challenge of managing a rise in international student applications. The next few years will shape the UK's position as a leading destination for top student talent. The question remains: is it ready to seize the opportunities ahead of it?

As a former international student myself, who moved from Iran to Canada to study, I experienced the challenge of relocating for education. However, this led me to where I am today.

Without the experiences and challenges I faced, my brothers and I would never have founded ApplyBoard. ApplyBoard simplifies the study abroad search, application, and acceptance process by connecting international students, recruitment partners, and educational institutions all on one platform. ApplyBoard has over 1,600 partnerships with education institutions across the world including over 50 higher education institutions in the UK.

Undoubtedly, the UK is one of the most desirable places to learn for international students. According to the Higher Education Statistics Agency (HESA), the number of people choosing to study in the UK from overseas increased by 34% from 2016/2017 to 2020/21. Student numbers from emerging countries have increased exponentially. This is evident when you look at countries like Bangladesh, where the number of students entering the UK is up 224% over the same period. These statistics alone highlight that international study in the UK is booming and that there's a variety of student populations attracted to the UK.

Within this report, we explore what the UK's current international student landscape looks like, pinpoint emerging student populations where we can expect to see growth in the future, and explore how to future proof the UK's education system.

PART ONE

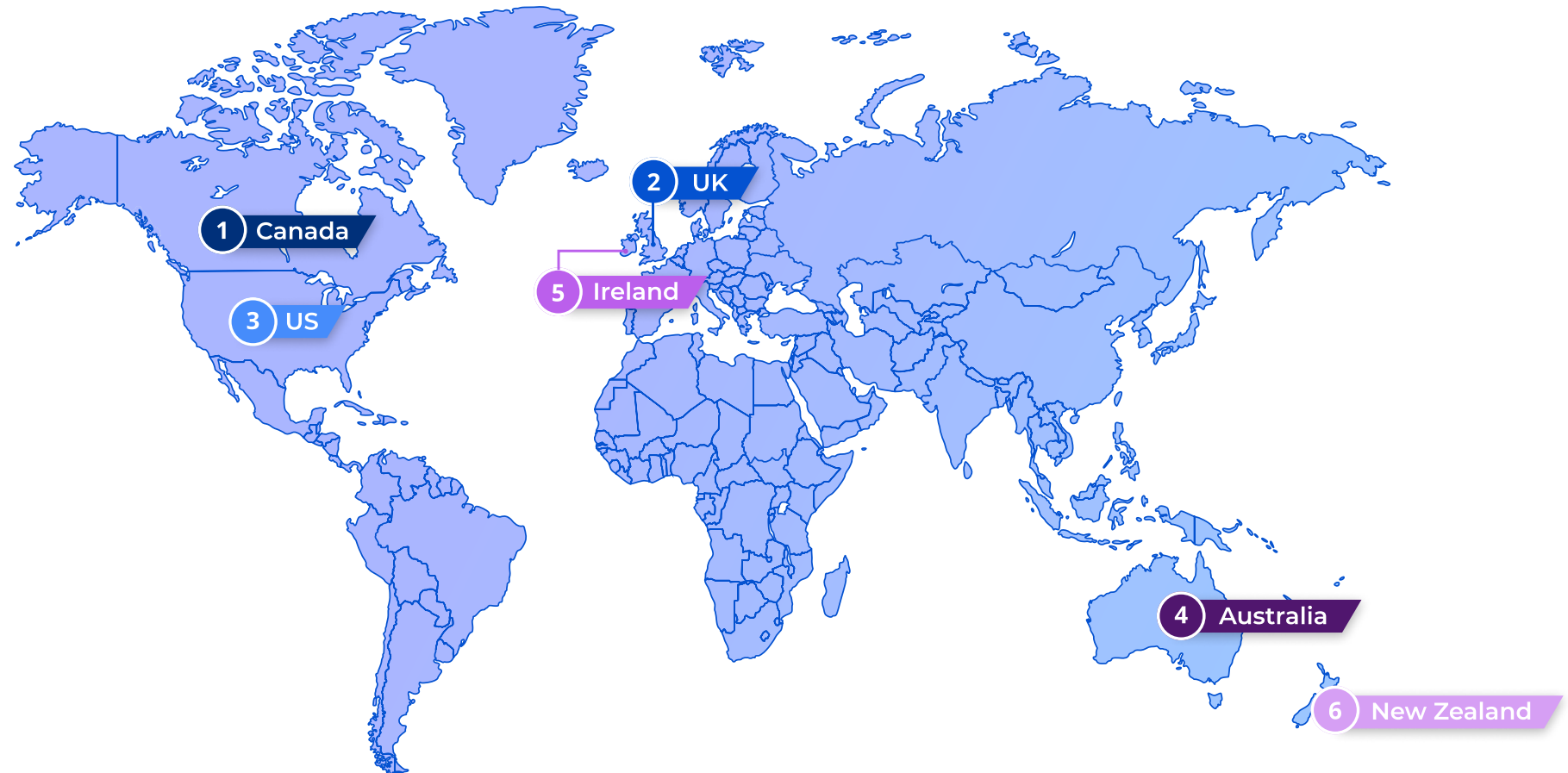
WHAT DOES THE UK'S INTERNATIONAL STUDENT COMMUNITY
LOOK LIKE CURRENTLY?



PART ONE: WHAT DOES THE UK'S INTERNATIONAL STUDENT COMMUNITY LOOK LIKE CURRENTLY?

The UK's international education sector is continuing to grow, and ApplyBoard research conducted among our global recruitment partners reveals the UK is the second most attractive study destination among international students, behind Canada.

MOST ATTRACTIVE COUNTRIES FOR INTERNATIONAL STUDY:



Considering the continuous uncertainty stemming from a global pandemic, Brexit and political turmoil, the growth of international students since 2016/17 speaks volumes to the attractiveness of the UK as a place to study.

The data shows that the 2020/2021 academic year was record breaking for international student enrolment in the UK. According to data from HESA, there are currently more than 605,000 international students pursuing their degrees in the UK.¹ This means the UK reached its goal of hosting 600,000 international students by 2030 nine years ahead of schedule. This highlights just how desirable a UK education is for people worldwide.

The UK's international education sector is continuing to grow. In fact, HESA data reveals that the number of international students studying at UK universities grew by more than a third (34%) between 2016/17 and 2020/21.

Even though the numbers paint a positive and very promising picture, it's important to remember that the success of the UK's international student population isn't just dependent on the number of students choosing to study in the country. Instead, top quality students and the diversity of the international student pool is critical.



¹ApplyBoard, [ApplyInsights: UK's Graduate Route Helps Fuel Record-Breaking Year for International Enrollment](#), February 2022.

PART TWO

HOW THE UK CAN CONTINUE TO LEAD
AS A STUDY DESTINATION COUNTRY



PART TWO: HOW THE UK CAN CONTINUE TO LEAD AS A STUDY DESTINATION COUNTRY

International students have a lot to consider when it comes to choosing the university they want to study at and the country they want to reside in. Career prospects, university credentials, and the country's economic status are just a few of the factors that students consider when exploring their options.

Comparing the UK to other top study abroad destinations, ApplyBoard's recruitment partners believe the UK is the most open and welcoming to international students, with almost all (92%) saying this is the case.² When asked whether the country is safe and stable for international students, recruitment partners placed the UK third (87%) behind Canada (98%) and Australia (90%). What's more, over three quarters (77%) believe the way the UK handled the pandemic has made the country a more attractive study destination.

Further research from UCAS reveals that for those applying for places in the UK, more than half (54%) say that prospects after graduating are most important.³ ApplyBoard's new research supports this. According to ApplyBoard's recruitment partners, post-study work opportunities and the cost of study are the two most vital factors for international students choosing where to study.

² Percentage of survey respondents who said they agree or strongly agree with the statement that "the UK is open and welcoming to international students."

³ UCAS, [Where Next? What influences the choices international students make?](#), May 2022.

⁴ Percentage of survey respondents who selected each factor from a list of 12 potential concerns among students looking to study abroad.

Three most important factors when choosing where to study⁴

Post-study
work
opportunities

90%



Cost of
studying in
the country

90%



Visa processing
times/approval
rates

86%



Finances are, and always will be, a key consideration for students. Given the current political and economic climate, the post-pandemic recovery and rising cost of living, incomes are being stretched worldwide. So it's no surprise that our recruitment partners say cost is the second most important factor for those choosing where to study.



What's more, ApplyBoard's data offers a glimpse into international student budgets. In 2022, almost half (46%) of all searches for UK courses on the ApplyBoard Platform were for programmes with an annual tuition fee of under 20,000.⁵ This is a stark contrast to searches for study in the US and Canada as just 27% of searches were for a course with a 20,000 tuition fee.⁶

⁵All amounts are listed in the currency charged by the school.

⁶ApplyBoard, [International Student Budgets Loosening, but Remain Lean](#), July 2022.

Even though it's promising to see that the UK remains an appealing study destination among international students, institutions shouldn't become complacent as initiatives and advancements in other countries could lead to the UK falling down the ranks. There are several other leading study destinations that continue to hold a strong reputation.

As the UK experiences this international student enrolment boom, it's important to ensure that it continues to attract and prioritise its emerging student populations. This will help the UK appeal to top talent across the world and attract quality students of all levels which will ultimately aid in supporting the UK's economy and labour market.

With these factors in mind, the UK government, institutions, business leaders and education leaders need to work as a collective to ensure the UK remains an attractive place for those considering international study. From raising awareness of the benefits of studying in the UK to sharing the opportunities available upon graduating, there are multiple ways international study in the UK can appeal to future students around the world.

An example of what could be done by leaders to amplify the number of international students arriving in the UK from emerging markets is raising awareness of the opportunities for post-graduation work. This could be done via continuous promotion of the Graduate Route in countries such as Nigeria and Pakistan where there is clearly a growing appetite for UK study.

The Graduate Route is a welcome addition to the work opportunities that exist in the UK. One of the biggest reasons it has received a warm reception is because it's an unsponsored route. This means it provides an opportunity for international students who have been awarded their degree to stay in the UK and work, or look for work, at any skill level for two years, or three years for doctoral students. There's no question, this is a top factor impacting the boom in enrolment in the UK from international students. It is a fairly new program and there is a large opportunity to promote and share the benefits of the route.

Focusing on student success and the most important factors for students when choosing where to study is ultimately what will make the UK more attractive to prospective students for years to come. It's important to continue to prioritise the growing needs of students.

PART THREE

DIVERSIFYING THE UK'S INTERNATIONAL STUDENT POOL



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International student enrolment in the UK is on the rise—but how does the UK ensure it's planning the best approach for not just the short term, but over the next ten years? To ensure long-term growth and sustainability of international student recruitment, the UK must continue to prioritise diversification.

When looking at the breakdown of international student populations, it's important to recognise that China and India are leading student populations given they are home to the biggest populations all around the world. According to HESA data, China accounted for almost a third (30%) of all first-year international students in the UK in 2020/21, while India accounted for a sixth (16%). However, it's worth noting that since the 2018/19 academic year, the market share of Chinese international students in the UK has declined by one percentage point.

In addition, recent data released by the UK government showed that India overtook China as the number one country of origin granted sponsored study visas for the UK in the year ending June 2022.⁷ Also, more than double the number of sponsored study visas granted to Chinese students were granted to Indian students in the second quarter of 2022.

This is an interesting shift, but, at the same time, the UK cannot simply rely on these two countries for its international student population. Overreliance on one or two countries risks leaving the UK vulnerable to regional economic downturns or geopolitical shifts that affect student movement. In addition to that, if the UK's goal is to continue to bring in top talent at the undergraduate, graduate and research levels, then attracting students from around the entire world is a top priority.

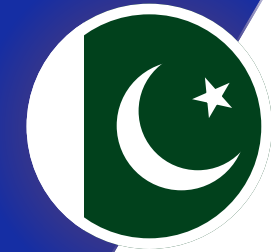


⁷Data courtesy of the UK Home Office, August 2022.

Emerging International Student Populations

Beyond India and China, there are a number of emerging markets which are having a notable influence on the UK's student population.

The same UK government data showed that the number of Pakistani nationals granted sponsored study visas grew by 377% in the year ending June 2022 versus calendar year 2019.

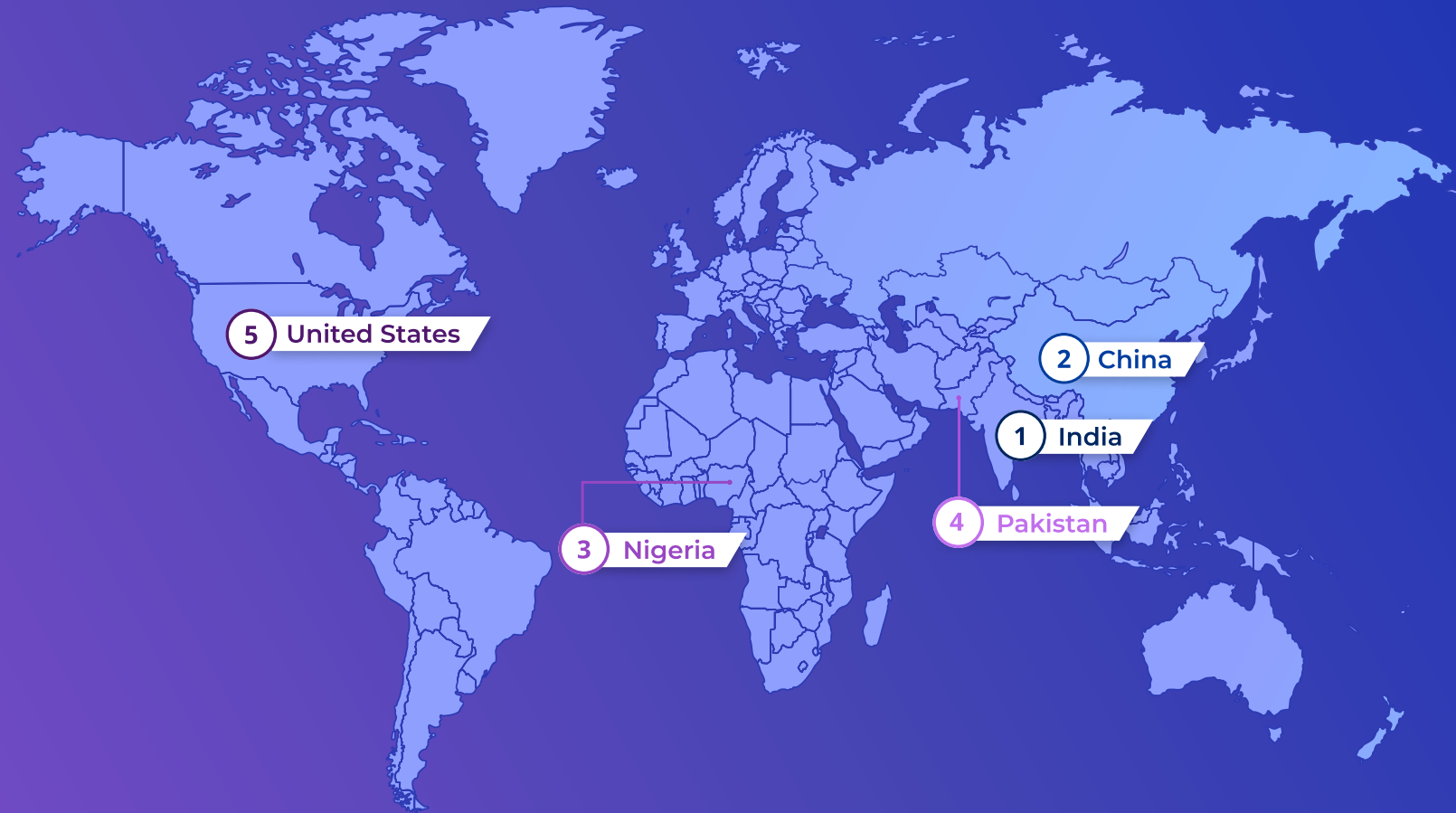


Pakistan is now the UK's fourth-largest market for sponsored study visas granted, having grown from just over 4,900 students in 2019 to almost 23,500 in the year ending June 2022.



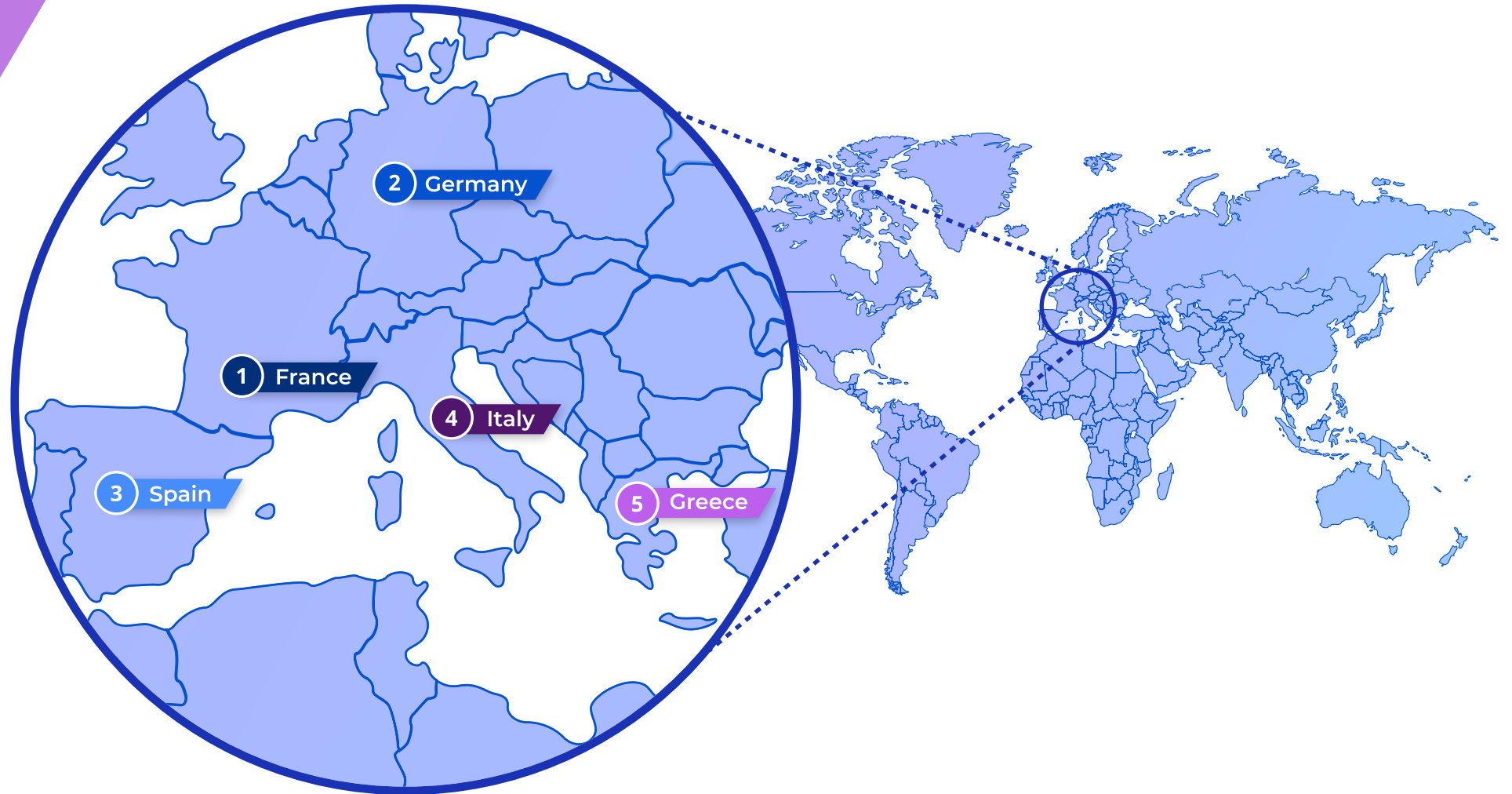
There were just under 8,400 Nigerian students granted sponsored study visas in 2019, and this number grew by 686%, to over 65,900 students, in the year ending June 2022.

TOP 5 NON-EU
NATIONALITIES GRANTED
SPONSORED STUDY
VISAS, YEAR ENDING
JUNE 2022:



The UK remains a popular study abroad destination for many EU countries as well, particularly France, Germany and Spain.

**TOP 5 EU NATIONALITIES
GRANTED SPONSORED
STUDY VISAS, YEAR
ENDING JUNE 2022:**





It's promising to see growth in these countries as diversification is essential to future proof the sector. There is considerable opportunity to grow the number of international students looking to enter the UK from emerging markets—especially those within the EU.

A student population which is made up of learners from countries around the world also adds new perspectives to the classroom, while giving students the opportunity to learn more about cultural differences—whether that be heritage and history or ways of living. Having a diverse, multilingual and multicultural learning environment can ultimately enhance the learning experience of all students. There have been research studies that have looked into the benefits of that diversity in higher education and why it matters. Some studies cite logical and instinctive factors that make this the case like the enhanced learning environment it provides, improved cultural competency, increased opportunity and a stronger workforce.⁸

Research from HEPI reveals international students contribute billions to the UK economy over the course of their studies.⁹ There's also a tremendous amount of impact that international students make after their studies—everything from the businesses and startups they create to the impact they make in our workforce as well which is sometimes not officially measured or tracked.

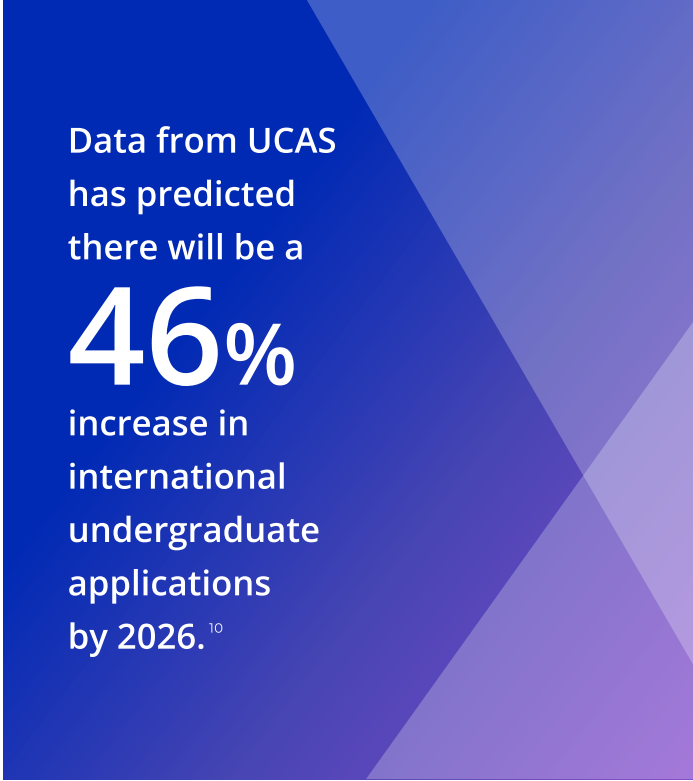
It's important to note that since reopening borders following the pandemic, the UK has been making strides in the right direction to increase appeal among those looking to enter the UK—from the Graduate Route, to offering more scholarships—but there is still more to be done amongst the government, business leaders and universities to ensure that the UK is recruiting, training, and retaining top talent that can further the country's long-term prosperity.

⁸ University & College Designers Association, [Diversity in Higher Education: Statistics, Gaps and Resources](#).

⁹ HEPI, [The costs and benefits of international higher education students to the UK economy](#), September 2021.

Future Proofing the UK's Education System

The UK currently has a record number of international students enrolled, and this figure is set to continue rising over the coming years.



Data from UCAS has predicted there will be a **46%** increase in international undergraduate applications by 2026.¹⁰

On the ApplyBoard Platform we're seeing this change begin to take place. From March to October 2021, UK student applications on the ApplyBoard Platform rose by more than 300% compared to the previous time period in 2020.

Higher education institutions in the UK and around the world are seeing a significant influx of applications in the aftermath of the global pandemic. More needs to be done to make the selection process more streamlined, while ensuring universities are receiving top quality applications that meet their requirements. This will lead to campuses welcoming some of the world's greatest talent and most innovative minds.

Increased support and use of technology to help universities with their international recruitment processes and plans becomes a major factor within the higher education industry to consider. Universities are quickly learning that education technology programs and platforms that tap into artificial intelligence and machine learning during the entire application process are saving the institutions time and resources. There are new areas of technology in EdTech that are helping to close the

gap and solve ongoing issues that impact universities typically at the application stage like conversion, identifying high-quality applications and prioritising diversity. This collection of efficiencies helps universities save time and allot more resources to supporting international students.

This moment in the sector is ultimately an opportunity for UK universities to continue to create a diverse, multilingual student campus where learners from all backgrounds can thrive. International students are bringing a number of life skills with them which will help them navigate their educational journey—think agility, resilience, determination and patience.

What can the UK do more to help students reach success during their student journeys and post-graduation? Keeping student success top of mind is critical for any study abroad destination that wants to remain competitive. Student success can range from completion of a degree to ensuring competitive employability for graduates.

¹⁰UCAS, Where Next? What influences the choices international students make?, May 2022.

CONCLUSIONS AND RECOMMENDATIONS

Here are our recommendations, based on the conclusions drawn from our research:

1 Streamlining the Process by Leaning into Technology

With the number of applications to UK universities set to increase over the coming years, universities need to put new processes in place to help manage the influx of applications. One way of doing this is by introducing technology, which can ultimately simplify and streamline the admissions process. Over the last decade, there have been huge technological advancements which can simplify processes by leveraging AI and machine learning. For example, before applications land with university admissions teams, technology can help sift through the applications to filter and ensure high-quality applications are seen by institutions.

Another solution which can help to reduce the pressure currently being faced by educational institutions is introducing a small application fee for international applicants. This would lead to international students being more likely to hand

pick the educational institutions they explore based on their grades, rather than applying to multiple institutions which they ultimately don't intend on seriously pursuing.

2 Planning for Long-Term Growth in International Student Recruitment

One of the core benefits of welcoming international students into the UK is the impact this has on diversity on campuses and, in the long term, workplaces nationwide. It's important to prioritise and nurture both international students and domestic students to build an innovative future. The opportunity here also means more talent will be trained and ready to fill in any labour shortages and skills gaps.

As part of the UK's international student recruitment strategy, it's important to continue to prioritise emerging student populations that are showing an interest in studying in the UK. One way of doing this is by making education more accessible and by highlighting the different opportunities which are available within the UK's educational space. This could be done by strengthening the promotion of



both the UK and its universities among those in emerging markets, with additional communications which emphasise how welcoming and safe the UK is, while highlighting the on-campus culture, academic excellence, work opportunities and long-term career prospects.

3 Focusing on Student Success and the Student Journey

As the UK embraces its international student enrolment boom, it's critical for the UK to not become complacent and to challenge itself to consistently improve the student experience. Looking ahead at the future needs of students is critical to remaining an innovative leader in the education industry.

About ApplyBoard

ApplyBoard empowers students around the world to access the best education by simplifying the study abroad search, application, and acceptance process to more than 1,600 institutions across the United Kingdom, Canada, the United States, Australia and Ireland. Founded in 2015 by three brothers and former international students, Martin, Meti and Massi Basiri, ApplyBoard has helped more than 400,000 students from more than 125 countries along their educational journeys. ApplyBoard is currently expanding its reach in the UK to help more international students achieve their potential at universities across the UK.

We'd love to hear your thoughts.

To discuss the information contained within this report further or to comment on the findings, please reach out to press@applyboard.com

For further information, please visit www.applyboard.com.

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About the Research

To form this report, we surveyed 207 ApplyBoard recruitment partners from around the world to uncover their views on the UK as an international student destination and showcase their beliefs as to what is important to those exploring international study.

In this report, we've explored government and third-party research, including data from the UK Home Office and UCAS to draw relevant conclusions and recommendations. We also analysed data from the Higher Education Statistics Agency (HESA).¹¹

¹¹ HESA data based on student numbers at all but three UK higher education institutions. The three universities not included in the research are Falmouth University, the University of Worcester, and London South Bank University.