Annual policy review

2023–24

UK Council for International Student Affairs

UKCISA

Contents

Foreword

UKCISA's Annual policy review brings together key updates, statistics and reports relating to international students, providing an accessible guide to keep up to date with the changing landscape of the sector. This third edition covers major sector themes that emerged from April 2023 to March 2024.

The Annual policy review aims to provide evidence-based recommendations from sector reports and data to help members tackle issues faced by international students and the higher education sector as a whole. By addressing the digital experiences, job skills integration, financial challenges, and the need for reliable data, the report seeks to guide institutions and policymakers in creating a supportive and inclusive environment for international students, ultimately contributing to the overall success and sustainability of the UK's higher education sector. Such work can be supported with the use of the UKCISA **#WeAreInternational Student Charter** which provides fundamental principles to deliver a world-class international student experience.

Where 2022 was the year of five education secretaries, three ministers responsible for higher education in the Department for Education, and three prime ministers within two months, 2023 did not provide political stability. As a focus on net migration has dominated UK politics, tightening visa restrictions and negative rhetoric towards international students has grown.

Adding to this instability is a lack of data to ground and guide policymakers in decision-making. The delayed publication of student data and Graduate Outcomes by the Higher Education Statistics Agency (HESA) has hindered the sector's contextual understanding of where and what students study. Additionally, there is a severe lack of data for the further education sector to understand their own international student reality. Recruitment levels have evidently fallen at the January 2024 intake (as reported by organisations such as IDP Connect and hinted at in Home Office statistics), but this did not stop Home Secretary James Cleverly commissioning the Migration Advisory Committee to review the Graduate route, despite insufficient data with which to evaluate it fully.

The sector has worked hard to conduct its own research to fill in some of these data gaps, providing numerous reports on the financial benefits and risks of international students and the sector's reliance on them, as mapped out in the Annual policy review. Additionally, ambition has not slowed, with the Scottish Government publishing their own **International Education Strategy**. This strategy sets out ambitions of enhanced branding of their strengths, welcoming hospitability and staying globally competitive. There are numerous initiatives such as their own Scottish Education Exchange Programme and a Talent Attraction and Migration Service to provide information and advice for students considering staying in Scotland after studies.

There have also been challenges in the implementation of digital experiences and meeting high student expectations. Students often pick the UK for their high-quality education and post-employment work prospects. The sector must ensure that prospective student expectations are set at a suitable level, while staying ambitious and innovative in their offering.

Other popular student destination countries have had their own global shifts in student number caps and postgraduate offerings, while popular sending countries such as China and Nigeria have narratives of staying close to home or facing currency devaluation. The UK has an opportunity to make the most of this popularity dip, but hostile environments caused by the UK government hinder this.

The sector must make the most of the numerous reports on the international student experience and the findings and insights produced to continue attracting international students to our shores. They provide a diverse learning environment for our students, contribute significantly to our economy, and provide innovative global talent for employers across the country.

1

Data for international students in the UK

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1. Data for international students in the UK

As discussions around the need for more and better-quality data permeate the sector, the lack of data is reflected in our Annual policy review:

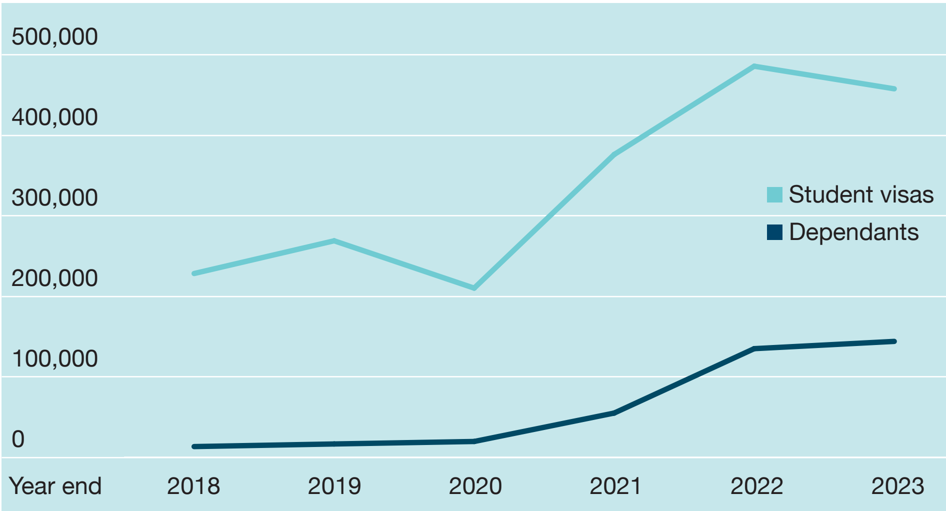
The Higher Education Statistics Agency (HESA), the body responsible for collecting, analysing and publishing data from higher education institutions in the UK, has delayed the annual publication of student data for 2022/23. At the date of writing, the data has yet to be published. As a result, the 2023/24 dataset will not be included in this year's publication of the Annual policy review. However, you can still find a collection of statistics from our sector below, varying across different findings such as immigration numbers and the student experience.

Immigration statistics

All mmigration data for study is taken from **GOV.UK entry clearance visa applications and outcomes** detailed datasets, year ending December 2023 – excel table visa D02.

Visa numbers

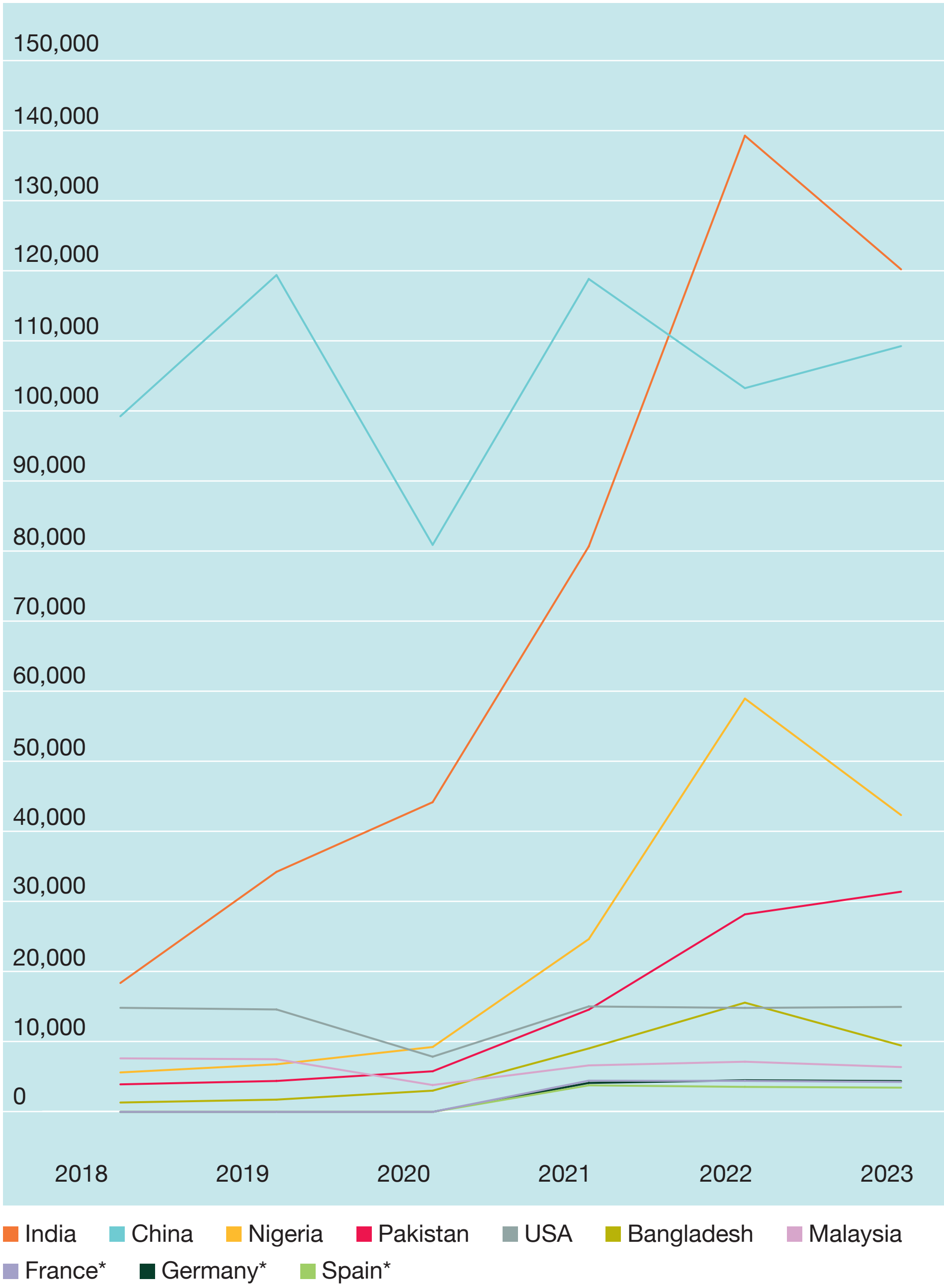
Total numbers of Student visas issued



There was a 5% fall in Student visas awarded in 2023 from the previous year. However, this is still a 70% increase from 2019. The spike is attributed to COVID-19 immigration restrictions easing, more welcoming policy shifts attracting international students due to initiatives like the Graduate route, and most European Economic Area (EEA) nationals now requiring a visa since free movement ended.

In the Migration Advisory Committee (MAC)'s **Annual Report 2023**, this visa growth was mainly attributed to postgraduate courses, with around 74% of international students studying at postgraduate level in 2022/23.

Countries with highest numbers of students studying in UK

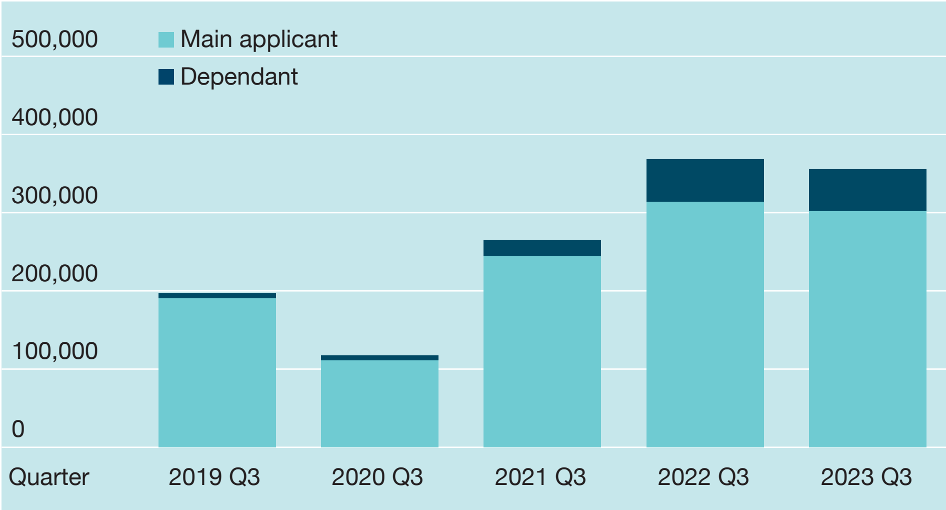


**Data only exist for European Union (EU)-country-sponsored Student visas post-2020, as these students previously experienced freedom of movement under EU law.*

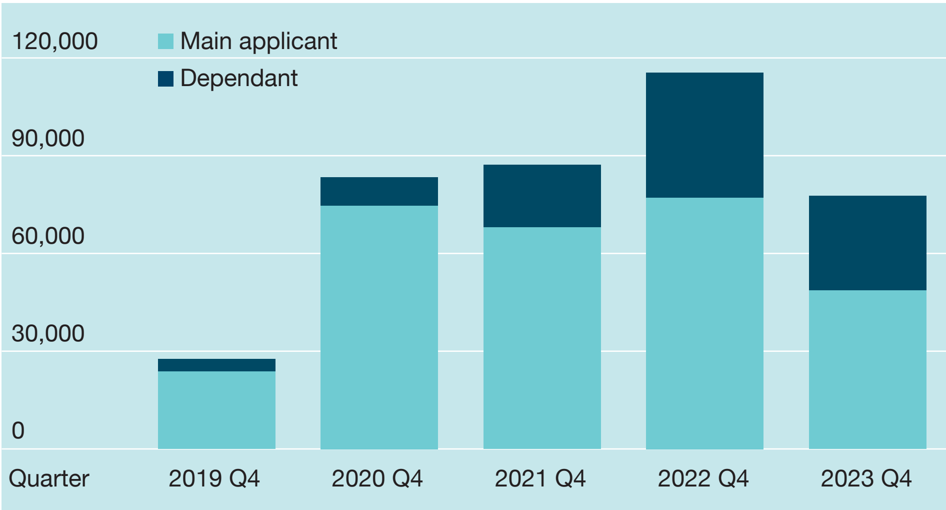
The majority of main applicant increases between 2019 and 2023 were from Indian (+85,849) and Nigerian (+35,366) nationals. We can see that, following the trend of overall applicants, the spike in numbers over recent years can be attributed to many of the same nationalities that dropped in numbers in 2023. Indian nationals made up 26% of all Main Applicant Student visas granted in 2023, despite their 14% drop from the previous year.

In 2023, China and India combined accounted for approximately a half of total international students who were granted a Student visa.

If we look at quarterly figures, we can see a much more interesting story.



Compared to the rapid increase from 2020 to 2022, the downturn in main applicants may have potentially led to institutions failing to hit their recruitment targets for September 2023. This may be worse for some institutions than others, depending on the diversity of nationalities focused on during recruitment.



2023 quarter 4 saw a 37% drop in Main Applicant Student visas granted and 24% in dependants. It is the first year in which the number of visas granted for both main applicants and dependents is lower than in quarter 4 the year before.

Countries where we can see a decline were particularly sharp in their drop in numbers for quarter 4: Nigeria showed a 63% main applicant decrease in 2024. This is in comparison to the 134% increase in the previous year. India also showed a decline of 43% in quarter 4, compared to a 62% increase the previous year.

This decline in granted visas represents a significant decrease in the number of students coming to the UK for courses starting in January 2024.

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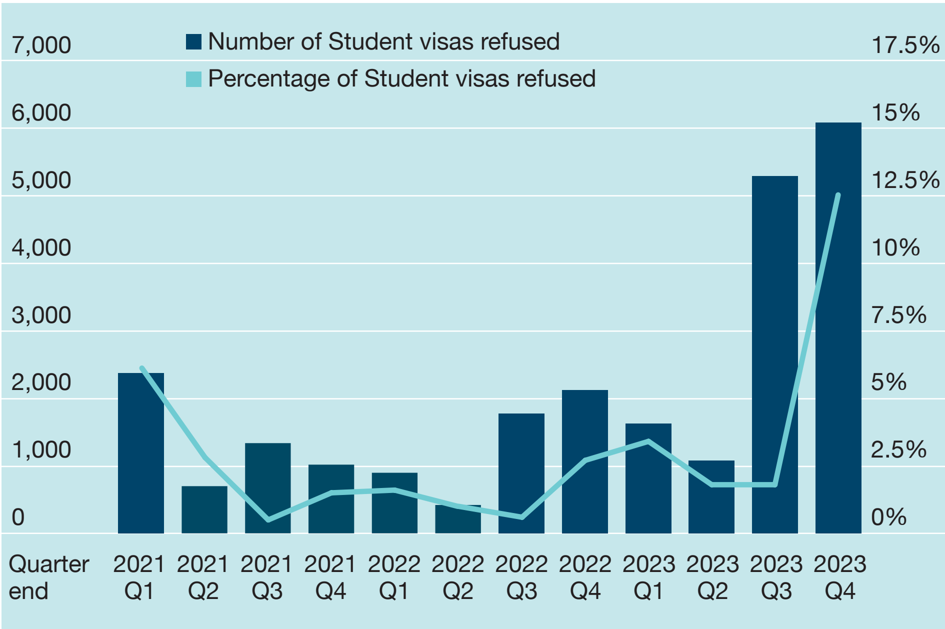
The cause for this decrease in numbers is likely to be a series of immigration changes and wider global issues, including increasing visa fees, the ban on bringing dependants for postgraduate taught (PGT) students, the announcement of a review of the Graduate route, the cost of living and changes to exchange rates, which impact on the value of local currencies against British pound stirling (GBP).

With this in mind, it is important for institutions to have diversity as a recruitment aim, and mitigate any dependence on certain countries. This will help mitigate any impacts that changing policies and global issues may have on specific sending countries.

Rejected visas

Refused Main Applicant Student visas per quarter



A Student visa can be refused by the UK Home Office for several reasons, including the applicant having insufficient funds for 28 continuous days to fulfil the maintenance requirements or providing incorrect or insufficient financial evidence.

In 2023, the percentage of Student visas refused increased from 1% to 3%. In quarter 4, the total number of refused applications at 12.5% was much higher than in quarter 3, or any other quarter, despite there being only one sixth of main applications comparatively.

Indian applicants made up 38% of the refused Student visas in quarter 4 and 40% in quarter 3. Indian applicants made up 36% of total main study visa applicants in 2023 quarter 4.

The Universities and Colleges Admissions Service (UCAS) undergraduate end-of-cycle data

This dataset examines the number of undergraduate applications and acceptances from students to UK institutions through the UCAS platform. It looks at applications made up until the [end of the 2024 application cycle] for the 31 January 'equal considerations' deadline. Although this is not the final deadline for applicants, the majority of students have applied by this time.

End-of-cycle data 2024

There were
115,730
international applicants

19%
of total applicants were international

There was a
2%
fall in acceptances for 2023/24

China, Turkey and Canada have the highest significant applicant increases

Nigeria had one of the biggest decreases in applicant numbers

Applicants
According to the UCAS 2024 cycle applicant figures for the January 31 deadline, there were 594,940 applicants, of whom 115,730 were international. This is around 5,000 more applicants overall than last year, continuing the ten year trend of a steady increase of international students applying to the UK for higher education.

EU applications are continuing to decline, with only 19,890 students applying in this cycle, less than half the number of five years ago. Applicants in the 25–29 age range have slightly increased, but trends over the past 10 years show that, each year when there is a small spike in applicants, it drops the following year.

Applications from the rest of the world (RoW), that is outside the EU and the UK, are rapidly increasing, albeit with signs of slowing growth. The past year has seen a 1.5% growth, while the previous year saw a 4.2% growth, and 5.5% the year before. This deceleration has transitioned into a decline for those in the 20+ age range. The older the RoW applicant, the sharper the decline in numbers for the 2024 January deadline.

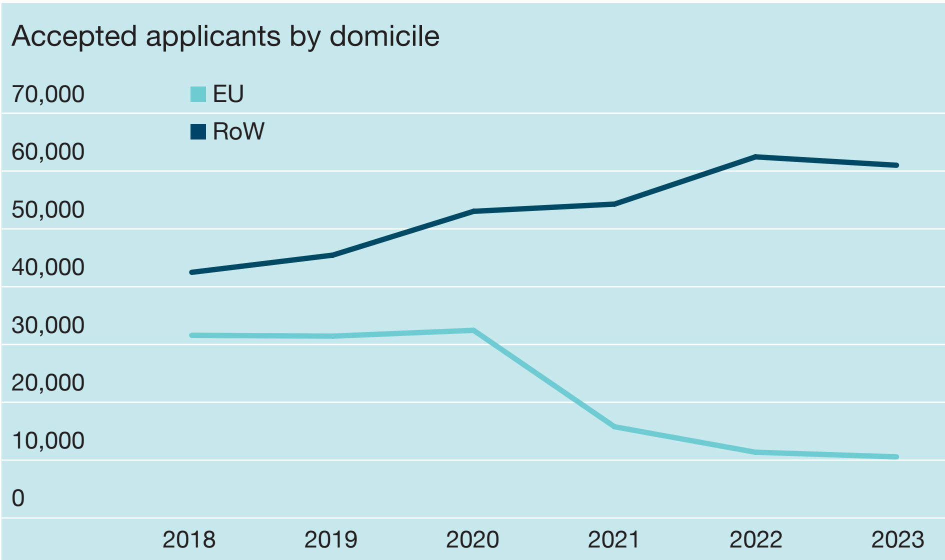
Comparing RoW applicants of 20 and under with those of 21 and over, the former have increased by 3% while the latter have decreased by 10% between 2023 and 2024. It is clear that younger students are more interested in coming to the UK for an undergraduate degree.

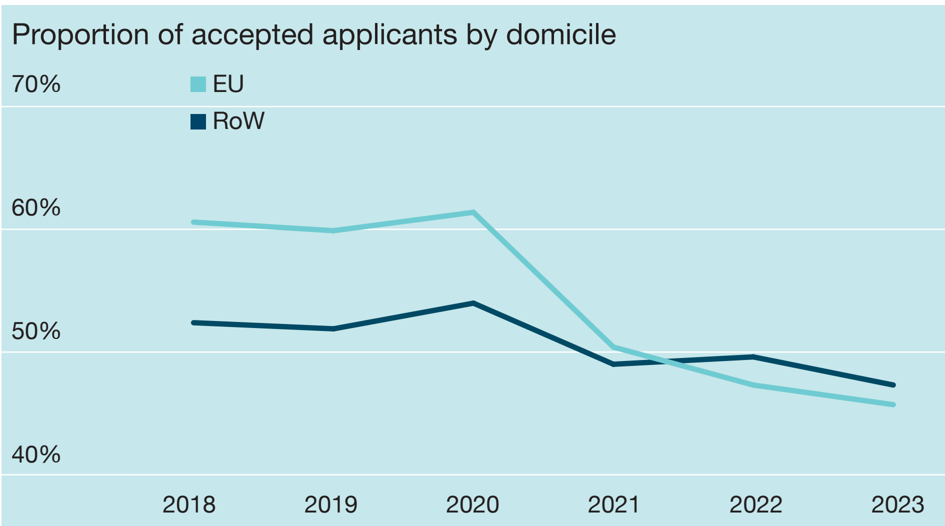
The highest increases by domicile are in students from China (+3%), Turkey (+37%) and Canada (+14%). There has been a decrease in applicants from Nigeria (-46%) and India (-4%), despite there being more visa applications from these countries for postgraduate education. We can assume that this could be in part due to the cost of the longer undergraduate degree against the backdrop of declining exchange rates against the GBP – the devaluation of the Nigerian naira means that studying abroad will now cost twice as much as in 2023.

It is worth noting that there is an overall decline in students (domestic and international) applying for subjects allied to medicine through UCAS. Healthcare recruitment could affect the availability of staff in the UK longer term, especially in certain regions where local mature healthcare students greatly contribute to the NHS.

End-of-cycle data 2023

Accepted applicants





Despite the decrease in EU applicants, the proportion of non-accepted applicants still decreased by 1.5%. This follows the general trend over the past four years of decreasing applications and decreasing accepted applicants from the EU.

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International graduates

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2. International graduates

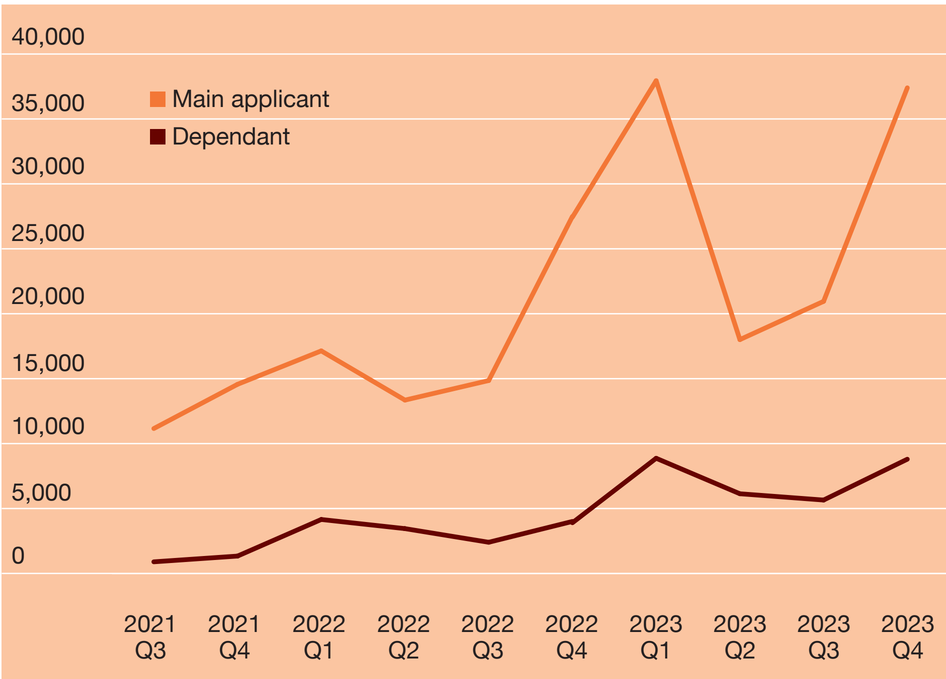
The Graduate route was introduced in 2020 as an unsponsored post-study employment route for international graduates in the UK. It provides flexibility for graduates to gain opportunities and experiences for two years, or three years if a PhD student.

There is minimal publicly available data on the Graduate route to date, including graduates' destinations during their time on the Graduate route or once it expires. Despite this, there has been much speculation in the media on what these students go on to do. The Migration Observatory published that over 60% of these graduates in the year to June 2023 became care or senior care workers, which was later withdrawn in April 2024 as incorrect data (since the Home Office is unable to provide data on people switching to the Skilled Worker visa from the Graduate route). During the period covered by this Annual policy review, the government commissioned the **Migration Advisory Committee** to conduct a rapid review of the route

The sector continues to work independently to gather evidence of the successes and challenges the route faces, and reports and case studies are being published regularly. A selection of these case studies gathered by the Association of Graduate Careers Advisory Services (AGCAS) are on the UKCISA website and will soon be collated into a report by AGCAS, to be published later in 2024.

Immigration statistics for Graduate route holders

All immigration data for Graduate route holders is taken from **GOV.UK extensions detailed datasets**, year ending December 2023 – excel table visa D01



Source: Home Office Extensions D01

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From the graph, it is evident that there are spikes in visa extensions granted in quarters 1 and 4, when many students complete their degree and wrap–up period and switch route. For the past two years, figures for quarter 4 have been almost double those of quarter 3.

Quarter 4 coincides with the announcement of the review of the Graduate route, which could suggest that, as the Graduate route as perceived as threatened, many students who were eligible wanted to ensure that they did not miss the opportunity to utilise it.

The Graduate visa: an effective post-study pathway for international students in the UK? The All-Party Parliamentary Group (APPG) for International Students and IDP Connect

The inquiry, held by the APPG for International Students, aimed to “determine whether the Graduate visa has been effective at supporting the international student experience and generating positive views of the UK as a study destination, as well as boosting local businesses and communities”.

The resulting report discusses the effectiveness of the Graduate visa for international students in the UK, providing insights from inquiries, expert roundtables and student feedback. It also provides recommendations for the government and higher education institutions to enhance the effectiveness of the Graduate visa. Many of these findings and recommendations follow trends of better quality, publicly available data, and positive rhetoric and promotion of the UK’s offering to international students, including graduate opportunities.

Key findings

- Students indicate positive perceptions of the visa, and many appreciate the simple application process, employability support, and work-experience opportunities.
- There is a strong correlation between the study destination and good post-study employment opportunities.
- Many employers are unaware of the existence of the route, leaving the explanation to students about its legitimacy and rules.
- The government should show commitment to the Graduate route by promoting and endorsing it as an effective and flexible option for both international graduates and employers, with support from the wider sector.
- There is a need for stronger data on this visa type to review and ensure the success of the route in promoting global competitiveness.

Select recommendations

Government should:

- publicly commit to maintain the route for sustainable policy, with regular reviews of its competitiveness
- utilise international graduates and their skills in tackling skills shortages and supporting local economies

- foster choices in the visa options available to graduates and simplifying the switching process

Higher education institutions should:

- develop a clear national strategy with government to address the unique employment challenges faced by international graduates and support the effectiveness of the route
- play a proactive liaison role between students and local employers

The document also emphasises the need for ongoing collaboration between the government, higher education institutions and employers to ensure the effectiveness of the Graduate visa, address challenges faced by international students, and enhance the UK's attractiveness as a study destination and a place for post-study work opportunities. The insights provided in the report underscore the importance of creating a supportive environment for international students, aligning visa regulations with the needs of students and employers, and fostering a positive perception of the UK as a study destination and a place for post-study work.

3

Colleges

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3. Colleges

Enrolment survey summary report, Association of Colleges (AoC)

Survey took place

October 2023

The AoC has conducted regular surveys of members about enrolments. In this year's edition, there is a small section that investigates international student recruitment.

The report flagged several challenges the college sector faces in international recruitment. This includes a lack of suitable accommodation and the cost of living.

In 2023, there was a substantial increase in 16–18 enrolments across the board, with adult enrolments for the most part on target or growing (attributed to post-pandemic confidence to return to learning).

However, for international students, higher education enrolment is falling. In 42% of respondents, international recruitment is down on the previous year, and only 31% met recruitment targets. In the previous year, 52% saw a drop in enrolment.

International student recruitment

52% drop in enrolment

42% institutions had lower recruitment than the previous year

14% institutions recruited more international students than targeted

2% of institutions had their target numbers unfulfilled

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College statistics 2022-23, Scottish Funding Council (SFC)

The SFC collects data on the students who attend colleges in Scotland. The 2022–23 data below* has been sourced through a freedom of information (FOI) request and taken from the SFC Further Education Statistics (FES).

There is no equivalent data for the rest of the UK.

**All numbers are rounded to nearest five.*

2,425
international students were enrolled in Scottish colleges in 2022/23

There has been a
28%
increase in international students since 2020/21

The most popular international subject was transport services, with
815
students enrolled

The most diverse subject was engineering, with students from
23
domiciles enrolled

The biggest significant domicile increase was from Saudi Arabia, from
20 students in 2020/21 to
225 in 2022/23 (for catering/food/leisure services/tourism)

The biggest domicile groups of international students at Scottish colleges were Indian (1,135), Saudi Arabian (225) and Kuwaiti (145). The most popular subjects were transport services (815), engineering (585) and area studies, which include languages, literature and cultural studies (415). In 2020/21, transport services was the most popular with 465 students, 42% being Indian.

There has been an increase in international students in the past three years, although it is worth bearing in mind that there has also been an increase in domestic enrolments across Scottish colleges. International student increases can be attributed to Kuwait, Saudi Arabia and India, from which enrolments increased by 40% from 2020/21 to 2021/22. The 2% increase the year after was not significant, but there was a 50% drop in those studying business/management/office studies, as students instead chose transport studies and engineering.

International students provide a diverse learning environment for their domestic peers in college. This is a crucial exposure for many students from the UK who may not otherwise have the opportunity to engage and learn in a multicultural environment with diverse experiences and perspectives.

These degrees provided by colleges allow international students another avenue through which to progress into higher education or gain qualifications they may not otherwise secure. There is no public data on what college students do after graduation.

4

Pathways

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4. Pathways

The power and impacts of pathways, NCUK and Nous

NCUK, a consortium of universities, offers pathway qualifications to international students worldwide through its global study centres. Upon completing these qualifications successfully (ranging from level 3 to pre-master's programmes), students are guaranteed admission to one of NCUK's 50+ partner universities, which offer thousands of courses. Progression opportunities exist to universities in Australia, Canada, Malaysia, New Zealand, Vietnam, the UAE, the UK or the USA.

Their report, *The power and impacts of pathways*, produced in collaboration with management consultancy NOUS, underscores the importance of international pathways for students seeking higher education opportunities. These pathways provide essential academic or linguistic support and serve as bridges between local qualifications and the requirements of destination countries' higher education systems. Such pathways are vital for aspirational students aiming to study abroad, promoting diversity and additional revenue in tertiary education and enriching the student experience and wider economy.

Amid challenging market conditions for institutions worldwide, pathway providers offer an additional avenue for students to access tertiary education abroad while fostering diversity on campus.

6%
of all accepted non-UK UCAS applicants were from a pathway programme*.

70%
of its international foundation year students go on to achieve a 2:1 or higher

89%
of its international year one students gain a 2:1 or higher

46%
achieving a first

This number is likely to be higher, as many do not apply through the UCAS system.

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Pathway providers contribute to and service international students and institutions across the sector, from directly enrolling students onto foundation courses to offering ongoing career services and graduate support. Pathways are currently working on increasing the ‘student support’ offer, adapting to the current student and wider sector needs.

In the section, ‘Benefits to international students’, the report highlights the benefits of pathway providers’ contributions to international education in providing a bridge between institutions and international students who may not otherwise be able to access higher education abroad.

NCUK makes it clear that institutions can diversify their recruitment processes by working effectively with pathway providers and their work in expanding emerging markets, thus mitigating risk in relying on dominating markets like China and India. This is especially important with fluctuations in competitiveness due to political rhetoric, policy changes and global economic events, as well as the impact of unforeseen external circumstances on institutions and countries.

Pathway providers suggest they can become key stakeholders that provide alternative avenues for international student recruitment. With the growing popularity in Anglophone countries, the UK must stay competitive in its offering and broaden its current recruitment methods. In this way, it will continue to drive global higher education, the national economy and the cultural benefits they bring to the classroom.

5

Understanding prospective student choice

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5. Understanding prospective student choice

Emerging futures, voice of the international student, IDP Connect

International respondents:

circa 11,500

prospective, applied, current and completed international students from 117 countries (53% postgraduate-level study and 28% undergraduate)

Survey took place

Feb–Mar 2024

Top first-choice study destinations

IDP Connect published its fifth edition of its *Emerging futures* series, sharing insights into the popularity of student destinations and factors that play a part in their choices.

1. USA 24%
2. Australia 23%
3. UK 22%
4. Canada 19%
5. New Zealand 4%
6. Ireland 2%

Primary factors in student choice

- a high-quality education – the first consideration in the top four first-choice countries
- good graduate employment opportunities
- a safe country for international students

Recent changes to migration policies have had a significant impact on perceptions of study destinations. The UK was ranked second best in education quality, after the USA, which is first for the first time. On post-study work visa policies and graduate employment opportunities, the UK was ranked fifth – moving down a position since the previous report in **August 2023**. The USA was perceived as having the best graduate employment opportunities of all countries, as well as being the best value for money.

'High-quality education' can be defined in many ways, so IDP Connect gathered student opinions of the factors that contribute to this. Looking specifically at the UK, students would judge this quality based primarily on the availability of graduate employment schemes, after which they would look at global institutional reputation. Good post-study work policies and global standing in various fields were also considered.

Student perceptions of what is important in a country vary over time and determine what countries are more popular. IDP Connect demonstrates that, currently, students value employment opportunities and the quality of education. Historically, the UK has performed well in quality, but since March 2023, it has fallen in favour. The **March 2023** edition showed that 65% of people looking towards post-study work visas were doing so for work experience.

Despite the changing global policy landscape in recent months in relation to migration and post-study visas, only 54% of prospective and applied students were aware of policy changes in their intended study destinations. This could result in a significant number of students coming with certain expectations, only to be disappointed with their experience, which would harm the global reputation of the UK. Further, 41% of prospective students to all destinations are reconsidering their study plans due to the uncertainty around policy.

Unstable policy environments will alter perceptions and cause students to turn to other countries. Almost half of prospective students are unaware of policy changes; considering the number of changes and amount of political rhetoric, it may be challenging for them to navigate what is changing and what is not. With the availability of graduate schemes being the top factor in choosing a destination, clear messaging is essential to set expectations and help students understand how policy changes may impact their experience.

The recruitment edge: UK, Quacquarelli Symonds (QS)

International respondents: **62,000** prospective students

Similarly to the IDP Connect surveys, QS runs regular international student surveys on recruitment trends. This report looks exclusively at prospective students' views on choosing the UK as their destination and an institution to study with.

Primary factors in choice of university

High quality of teaching ✓	Good reputation for their subject ✓
Safe and welcoming environment ✓	Institution's environmental sustainability strategy and efforts ✓

Teaching quality is defined by respondents as:

The university receiving recognition	**67%**
The university being well ranked overall	**64%**
The university using up-to-date technology	**58%**
The quality of teaching staff	**58%**
A high graduate employment rate	**57%**

Studying at a well-ranked university is a requirement that prospective students seek more from the UK than other Anglophone countries like the USA (62%) or Australia (59%).

This edition showed that 43% of prospective students have no interest in online learning, compared to 33% the previous year. QS attribute this to the desire for meeting other students face to face, as well as the perception that online teaching is of a lower quality to in-person.

Employability

44% hoped to stay in the UK for one to six years to gain graduate work experience

Graduate outcomes have repeatedly been shown as one of the top factors that determine the country a student will choose to study in. Respondents believed that a degree from a university of good reputation will provide better career opportunities.

The top three considerations, when thinking of graduate outcomes, hat respondents shared were: learning a new skill, building a professional network and gaining international experience. Having in-person classes would contribute to building a network, as it provides more opportunities to meet and build relationships with peers.

Environmental sustainability

Five UK universities are ranked in the global top 20 in the *QS World university rankings: sustainability 2023*

4th – The University of Edinburgh
13th – University of Glasgow
16th – University of Oxford
18th –Newcastle University
19th – University of Cambridge

An institution's environmental sustainability strategy and efforts are increasingly being considered by prospective students when deciding on which institution to study at. This is especially so for postgraduate students, or those looking to study fields related to sustainability, such as in geography or agriculture.

UK institutions are perceived as one of the best performing for environmental sustainability action compared to their competitors. As climate change gains more visibility in the media and younger generations reach higher education age, institutional performance will increasingly play a part in student choice. Institutions should ensure that they publicly celebrate initiatives and actions taken so prospective students can easily find reference to them.

Sharing information on this, alongside other topics institutions want prospective students to see, should be done through channels that they would engage with. QS analysed the top 10 channels that prospective students use to research and reach universities in the UK – all of which depend on the region they are from. Students from Latin America and Western Europe rely on Instagram and LinkedIn, while those from North America, Africa and the Middle East use Facebook the most. The most popular platform overall is YouTube, which 58% of prospective students use.

Institutions must be mindful about what platforms prospective students are using to research their institution and course, and how they are being perceived based on content on these channels. Providing accessible information and a place to ask current students questions about their experience may help to provide the support and assurance students are looking for when choosing a study destination, as well as reasonably setting expectations from the outset.

Analysis of international student enrolments in January 2024, The Chartered Association of Business Schools (CABS)

Survey took place:

January 2024

region:

50

schools across the UK

CABS is a membership organisation for business and management schools in the UK. Business schools attract around one third of international students studying in the UK and bring £13 billion to the national economy.

Its 2023 annual membership survey showed that international recruitment is becoming more challenging for business schools, with one third seeing a decline in RoW students in 2023/24. 98% of respondents to the members' survey also shared that their parent university was reliant on this postgraduate international student income.

The 2024 report presents January 2024 international student recruitment and analyses how recent migration policy changes (for example, increasing visa fees, restrictions on dependants) have impacted it.

90% of respondents agreed that recent government migration policy impacted international student recruitment

RoW student enrolment for the January 2024 intake was lower for 76% of the responding schools than in the previous year. 41% of schools also reported lower EU enrolment. Postgraduate enrolment was particularly low with a 45% reported decline in postgraduate EU enrolment and 77% decline for postgraduate RoW.

With some institutions relying so heavily on recruitment for their business schools, this downturn in enrolment could cause significant financial issues for students – 78% of January-start programmes are at postgraduate level. Additionally, many courses rely on the numbers of international students to ensure that courses have enough students to sustain themselves. A lack of students could result in courses being discontinued.

Percentage of responding business schools' low performance against recruitment targets:

	EU	RoW
Undergraduate	28%	45%
Postgraduate	72%	78%

The RoW postgraduate numbers were deemed most challenging, with 61% falling significantly below recruitment targets. EU undergraduates represented the most successful recruitment, with two thirds meeting their targets. No school significantly exceeded targets with any international student group.

When asked whether the respondents believed that recent policy changes had caused this dip in recruitment, nine out of 10 schools agreed with or strongly affirmed the statement. An additional comments section in the survey showed contextual worries that UK business schools were aware that other countries with more favourable policies would be perceived as more welcoming than the UK.

The decline in recruitment was not only from Nigerian markets, but also from regions including Europe, South Asia and Latin Amera, indicating that it is not only changes in policies, like the restriction on dependants, that is curbing international student numbers. Negative rhetoric, visa delays, the cost of living and hesitancy over the future of the Graduate route were flagged as additional factors impacting numbers.

Potential significant declines from the Indian market were also of great concern, as that market has so far helped diversify recruitment from China. Work must be done to mitigate this impact on markets to ensure that diversity across markets is continued, and there is clear messaging from institutions of support, guidance and welcome.

6

Financial contributions and sustainability of the sector

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6. Financial contributions and sustainability of the sector

The benefits and costs of international higher education students to the UK economy, Higher Education Policy Institute (HEPI), Universities UK International (UUKi), Kaplan International Pathways, and London Economics

Following two previous studies of the 2015/16 and 2018/19 international student cohorts' impact on the UK economy, analysis has been carried out on the 679,970 international students in the UK in 2021/22.

International students greatly contribute to our national economy and constituencies, not only during their studies but also for years after they graduate.

UKCISA recommend the findings of this report be read alongside other evidence of the non-financial benefits of international students to gain a broad understanding of the true impact and their contributions to the UK.

Academic year of data source:

2021/22

Region: UK wide

Figures given below represent the benefits and costs of the first-year international students enrolled at UK higher education institutions and commencing studies in the 2021/22 academic year, with the impact associated with these students over the duration of their study in the UK.

Key findings

Total net impact on
UK economy:

£37.4bn

across their studies

£3.9bn

EU-domiciled students

£33.5bn

RoW-domiciled students

Total benefit to economy:

£41.9bn

benefit to cost ratio of

9.4

Every EU student
contributed around

£137,000

over their studies

Every RoW student
contributed around

£107,000

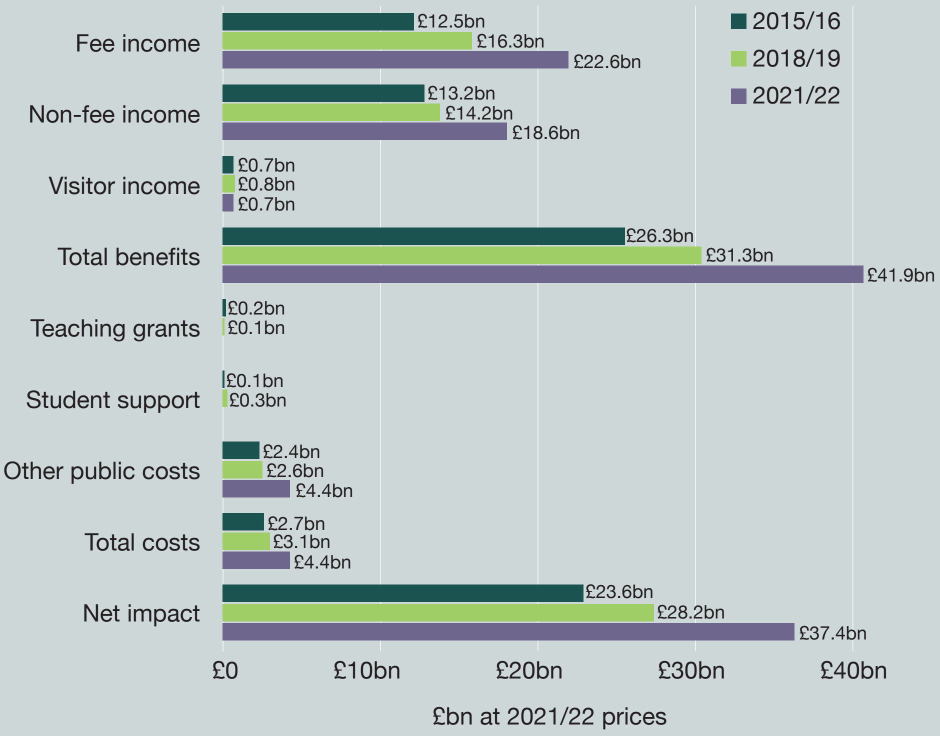
over their studies

Economic contribution
per parliamentary
constituency is

£58m

International students play a crucial role in boosting the UK's economy and soft power globally, making them a valuable asset to the country's higher education sector. Almost 10 years ago, the 2015/16 cohort contributed £23.6bn net. The 2021/22 cohort has pushed this figure up by 58% in real terms.

Net impact associated with the 2015/16, 2018/19 and 2021/22 cohorts

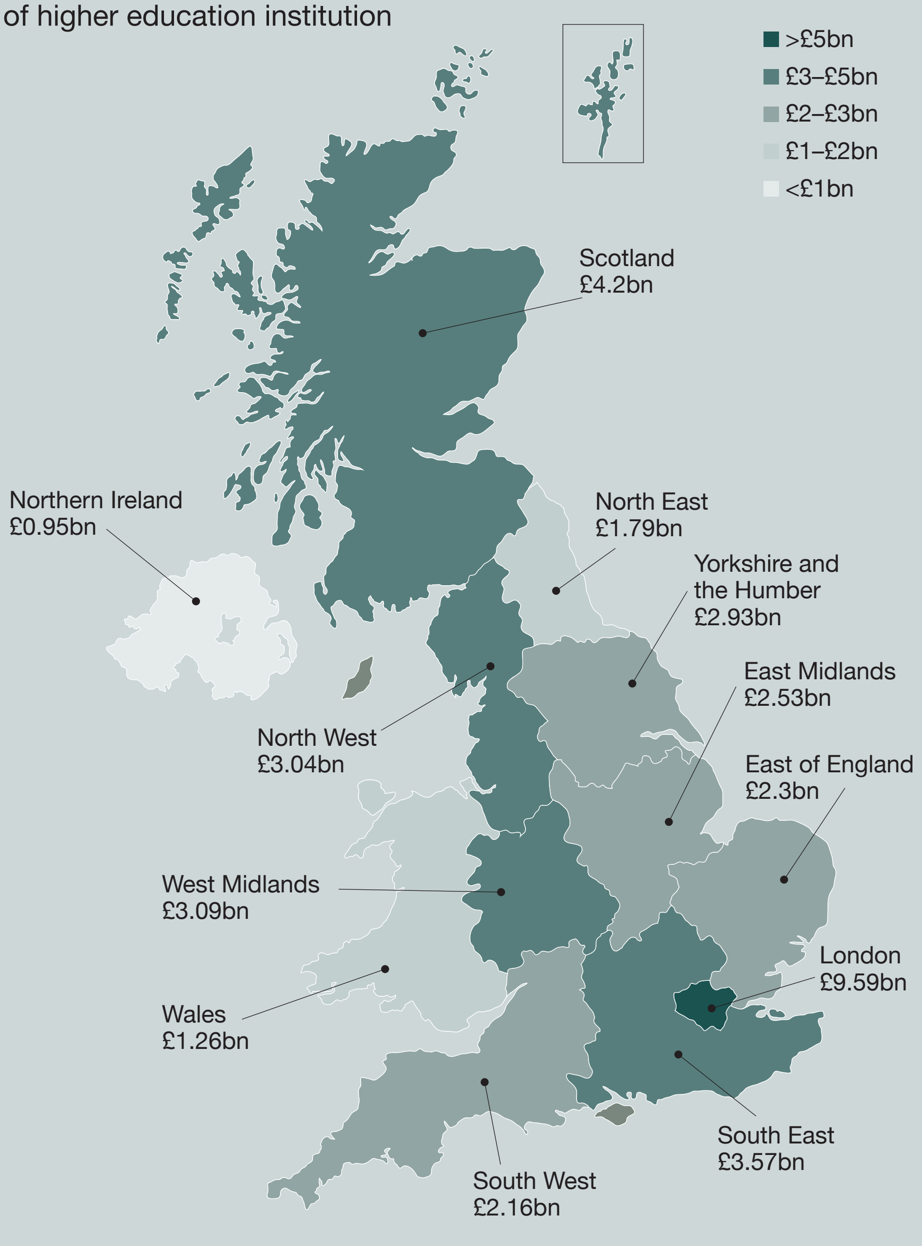


The report breaks down the financial benefits per constituency and region, showing how much each of the 650 constituencies gains. Glasgow Central gained £292 million from this cohort, which is equivalent to £2,720 per resident. London as a region gained £131 million, equivalent to £1,040 per resident. It is recommended that the reader go to the report to find their own constituency.

There have been significant increases in international students throughout the country, with Scotland and Northern Ireland benefitting from them despite their shortfalls in income for educating domestic students. EU students have fallen in numbers since the UK left the EU, with Ireland being the biggest source of students in 2021/22 and total EU students representing 8% of international students in that academic year. RoW made up 92% of international first-year students, and they were studying mainly postgraduate degrees.

EU students are more likely to undertake undergraduate degrees, which have a longer study duration than postgraduate degrees. This results in the EU students contributing more to the UK economy per student than RoW students, as the benefits accrue over a number of years. The EU-domiciled student is also likely to cost the UK economy slightly more, but it is a relatively small amount and represents only 8% of the total international student body in 2021/22.

Net impact associated with the 2021/22 cohorts by location (region) of higher education institution



Note: Values are rounded to the nearset £0.1bn. All estimates are presented at 2021/22 prices and discounted to reflect net present values.
***Source:** London Economics' analysis. Contains Office for National Statistics data (licensed under the Open Government Licence v.3.0) OS data, Royal Mail, Gridlink, LPS (Northern Ireland), NISRA data, NRS data and Ordance Survey data © Crown copyright and database right 2023.*

It is hoped that this report adds to the evidence base of the contributions that international students make to the UK, highlighting the economic benefits for decision makers and policymakers.

As said in the introduction to this report, UKCISA remind readers to read the findings of the report alongside other evidence of the non-financial benefits of international students to gain a broad understanding of the true impact and their contributions to the UK.

UK higher education financial sustainability report, Pricewaterhouse Coopers International (PwC)

Academic year of data source:

2022/23 regulatory forecasts*

Region: England, Scotland, Northern Ireland

**The Annual Financial Returns 2022 for England and Northern Ireland, and the Strategic Plan Forecast 2023 for Scotland were used.*

Universities UK commissioned PwC to investigate the financial challenges that 84 higher education institutions currently face. These challenges stem from a range of factors including the frozen domestic fee cap since 2012 (with a minor uplift in 2017), increasing operating and staff costs, the research at institutions often operating at a loss, and the risk affecting the quality of education and student experience if not addressed.

The report provides insight into the economic forecasting of the university sector to show the extent of the financial challenges and risks facing this diverse sector.

It is worth noting that the work was conducted between July and September 2023 with data from 2022/23. This could lead to:

Key threats

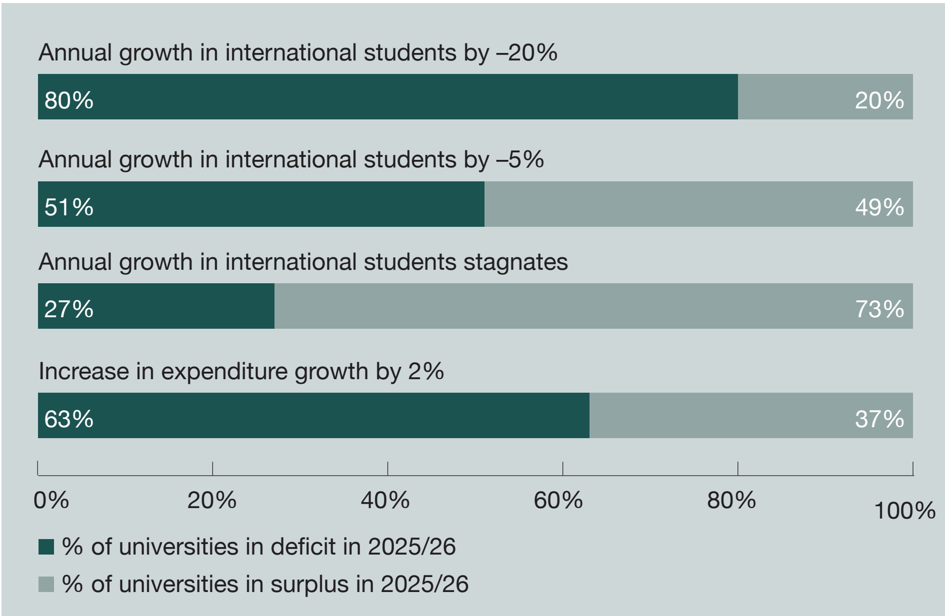
- There is a risk of over-reliance on international student recruitment due to constraints on income generation (domestic fees, research grants) with increasing base costs (staff pay negotiations, fluctuating pension contributions, energy costs) and current debt.
- Full economic cost recovery in research is restricted by inflation and a lack of funding opportunities, both domestically and globally.
- Government policy on immigration and institutional regulation could affect both international student recruitment (for example, dependents, the Graduate route, visa costs) and domestic student demand (for example, the lifelong learning entitlement, minimum course standards).

Research-intensive providers and specialist institutions in England are more vulnerable to change in the level of international enrolments due to their reliance on international student fees. Such specialist institutions forecasted stronger growth than the historical sector average at the time of reporting, and PwC predicted around 8% growth in international entrants over the forecast period.

The PwC report also details that 40% of Universities UK (UUK) members in England and Northern Ireland forecast a deficit in 2023/24, including 60% of larger research-intensive institutions. Forecasting for 2026/27 indicates around 2–5% surplus income due to less borrowing and falling capital expenditure.

For Scotland, it was calculated that by 2024/25, around 36% of universities will have fallen into deficit. Institutions in Scotland are particularly reliant on international students cross-subsidising costs, and expenditure growth will likely remain high.

Future realities if steps are not taken to mitigate challenges
A significant number of institutions are sensitive to reductions in student numbers and increase in expenditure.



England and Northern Ireland

Up to

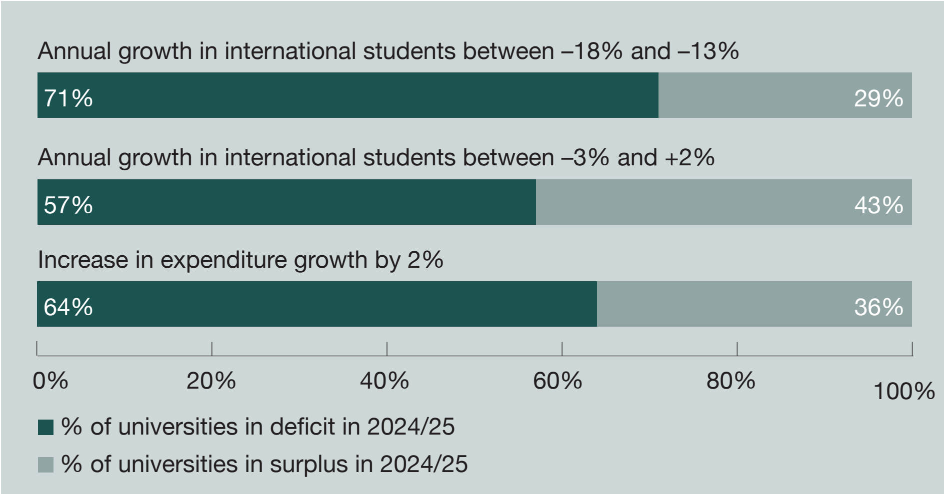
80%

of universities could be in deficit by 2025/26 if international student enrolment declines by 20% of forecast in 2024/25

If international student enrolment remained the same,

27%

of universities could be in deficit



Scotland

Up to

71%

of universities could be in deficit by 2024/25 if international student enrolment declines by 20% of forecast in 2023/24

Costs are likely to rise

7.8%

while income will only rise 5.2% from 2021/22 to 2024/25

Home Office data for year-end December and data from companies like Enroly show that these predictions could easily become a reality as international student numbers start to decline.

The PwC report recommends how to navigate the future:

- Efforts are needed to stabilise the international market by reducing negative rhetoric about international students and harsh policy changes (for example, on dependants) and retaining the Graduate route.
- Consolidation within the sector is necessary to set sustainable and diverse recruitment practices for the longer term, both for domestic and international students, and to prepare for a potential domestic shift to alternative education.
- Despite institutions looking to reduce restructuring costs in the coming years, investments in physical and digital infrastructures are necessary to save long-term expenditure and improve the student experience.
- Increased financial and policy support from government and funding bodies are necessary to fund operations, regulation costs and research work as well as to implement digital infrastructure and decarbonise supply chains to assist in reaching climate sustainability.

7

Academic experience

UK Council for International Student Affairs
UKCISA

7. Academic experience

Academic experience can be assessed in numerous ways, from graduate outcomes to perceived value for money. The annual National student survey (NSS) collects undergraduate final-year students' opinions on the quality of UK higher education courses, looking at various aspects of the student experience and providing insight into what they like and do not like about their courses. Institutions look to the league table generated from these results.

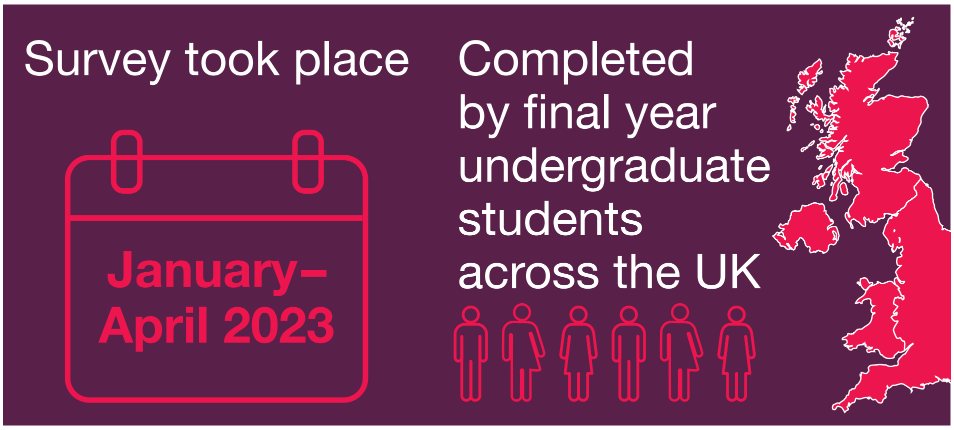
The Higher Education Policy Unit (HEPI) and Advance HE also collect academic experience data from undergraduate students in their annual Student academic experience survey (SAES). It reflects full-time undergraduates' opinions of their time in higher education and their attitudes towards relevant policy issues. Advance HE additionally collect this data for postgraduate taught and postgraduate research students.

Overall satisfaction with courses across course levels

The academic experience of students is mapped in multiple reports across the sector. Different student group's satisfaction with various aspects of their experience is explored in more detail in each report summary in this document. However, to make it easier for the reader to compare student satisfaction across different academic levels, below is a graph showing overall satisfaction percentages of all students.

NSS (Undergraduate)	2021	2022	Scotland 2023	Northern Ireland 2023	Wales 2023
International	77%	79%	79%	80%	81%
Domestic	75%	76%	77%	80%	75%
Postgraduate taught	2021	2022	2023		
International	81%	84%	86%		
Domestic	77%	79%	79%		
Postgraduate research	2021	2022	2023		
International	79%	82%	81%		
Domestic	79%	79%	79%		

International students' satisfaction with their academic course, National student survey (NSS) 2023, Office for Students



There were a number of changes made to the 2023 NSS, which are reflected in the findings.

- The "overall satisfaction" question for institutions in England was omitted, following record low domestic student-satisfaction levels in recent years, but this has continued to be measured in Scotland, Wales and Northern Ireland.
- The response options were changed to remove "neutral" as an option, so more students can be expected to respond positively, regardless of any changes to the student experience.1
- Mental wellbeing services were asked about for the first time.

All the data is shown in the 'positivity measure' format – the proportion of respondents who selected a positive response to the question.

Academic support

Question 15: How easy was it to contact teaching staff when you needed to?

	England	Scotland	Wales	NI
EU students	87.0%	90.7%	89.0%	87.4%
RoW students	84.5%	85.8%	87.0%	88.3%
UK students	82.7%	83.8%	81.7%	84.4%

International student responses are above the average positivity measure for this question across all four nations (83.2%). EU students gave consistently high responses in all four nations compared to the UK and RoW students. As we would not expect the contact method to differ much between nations, we can assume that this is due to expectations differing, depending on where the students are from.

Jisc's *International students' digital experience* reports (parts one and two are explored later in this document) explain that culture can play a large role in students' comfort with contacting staff, as well as their expectations of how quickly they should hear back from them. Culture may also play a part in how staff respond to contact made, by region (to a much lesser extent). One of the recommendations in the second Jisc report highlights the importance of setting these expectations from the beginning.

Mental wellbeing services

Question 26: How well communicated was information about your university/college's mental wellbeing support services?

	England	Scotland	Wales	NI
EU students	79.9%	75.4%	78.1%	79.7%
RoW students	83.5%	77.7%	82.3%	85.2%
UK students	74.6%	70.9%	70.5%	77.3%

International student responses are above the average positivity measure for this question across all four nations (75.4%). RoW students consistently responded with the highest option of "very well" the most frequently in all four nations. Similarly, UK students always responded the least positively to this question.

It could be the case that international students are more aware of or more actively look for services to help them navigate their new environment. However, as Student Minds flagged, 2 it is worth considering that, although international students may be more aware of mental wellbeing support services, they are less likely to use them. It is not enough to signpost these services; there must also be reassurances of confidentiality and details of what they can be used for readily available.

Overall satisfaction

Question 28: Overall, I am satisfied with the quality of the course (for students in Scotland, Northern Ireland and Wales only)

Overall international student satisfaction

Northern Ireland
80.2%

Scotland
79.4%

Wales
81.0%

	Scotland	Wales	NI
EU students	78.7%	79.7%	80.0%
RoW students	79.8%	81.6%	80.3%
UK students	76.6%	74.5%	79.7%

While the average positivity score for this question across the three nations for all students was 76.9%, international students showed a higher level of satisfaction than domestic students. Scotland had the lowest overall positivity rating, and RoW students were again more satisfied on average in every nation.

Overall positivity rating

Each question has a positivity measure – the proportion of respondents who gave a positive answer to questions. The below rankings are the best scores of all UK providers (with at least 1,000 responses).

University of St Andrews
1st with
86.9%

University of West London
2nd with
85.9%

LCA London
3rd with
83.3%

Top rating for Wales

Aberystwyth University
6th with
84.7%

Top rating for Northern Ireland

University of Ulster
11th with
83.4%

Student academic experience survey 2023, HEPI and Advance HE

Survey took place
March 2023

International respondents
17%
(circa 1,730)

Data was taken from the multiwave dataset.

Value for money

One of the prominent topics covered in the survey is student perceptions of their courses representing good or very good value for money.

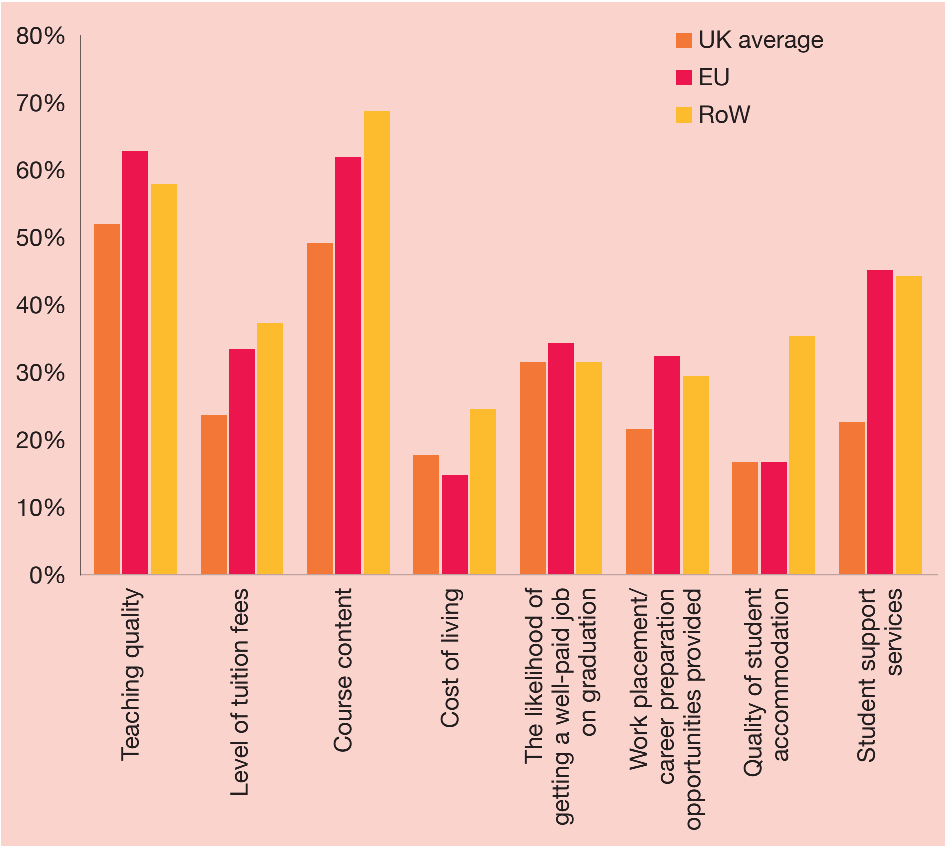
	Scotland	Wales	EU	RoW	England	NI
2019	63%	47%	44%	37%	39%	385
2020	57%	41%	48%	43%	37%	37%
2021	50%	29%	30%	33%	24%	27%
2022	48%	40%	36%	36%	34%	28%
2023	51%	37%	35%	38%	35%	31%

Question 16: Table 75

Scotland and Northern Ireland both saw increases in perception of value for money in 2023. This could be attributed to the pandemic measures having fully ceased, resulting in students having more in-person opportunities again and valuing the teaching quality.

Across the rest of the nations, the perception of value for money in students from RoW and England increased slightly, and in those from EU and Wales decreased. However, none of these changes represented significant jumps in perception.

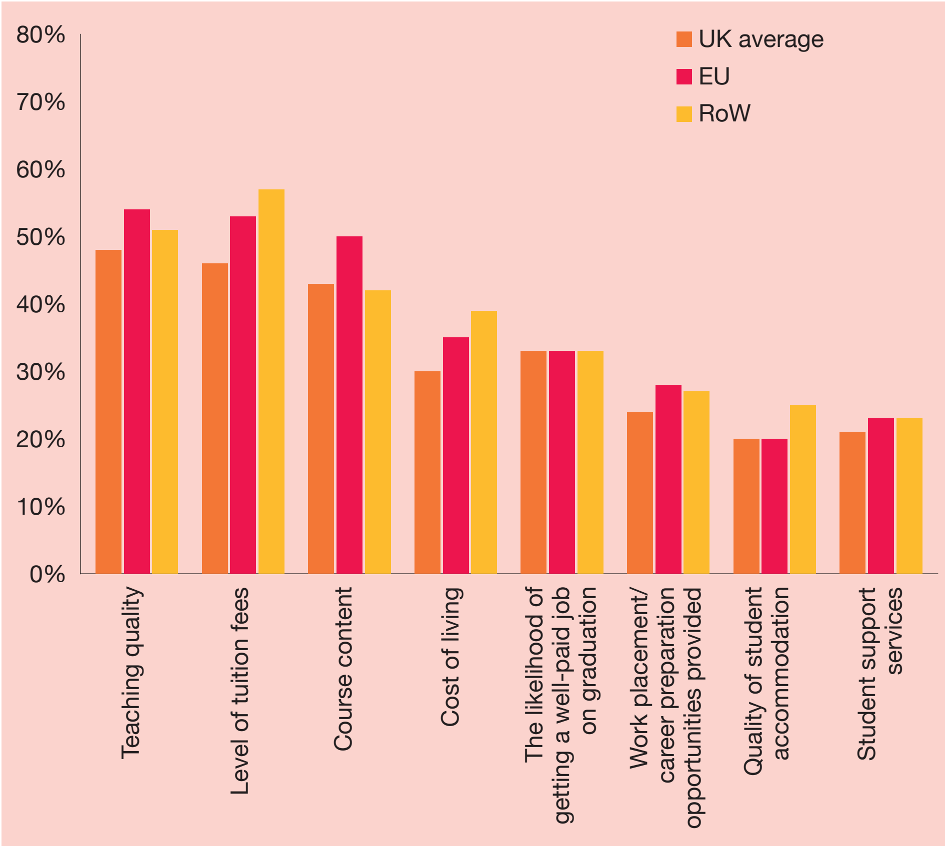
Factors influencing students' responses in the "value for money" question:



Question 16b: Factors the students were thinking about when rating the value of their education

UK Council for International Student Affairs UKCISA

2022 for comparison



Question 16b: Factors the students were thinking about when rating the value of their education, Table 78

The teaching quality and course content were more prominent in respondents' minds when they were thinking about value for money, and the satisfaction with the level of tuition fees has dropped significantly across all three groups by over 20%.

To what extent, if at all, have concerns or challenges around the cost of living negatively impacted your studies?

	UK	EU	RoW
A lot	25%	27%	27%
A little	50%	50%	43%
Not much	19%	17%	22%
Not at all	5%	6%	8%

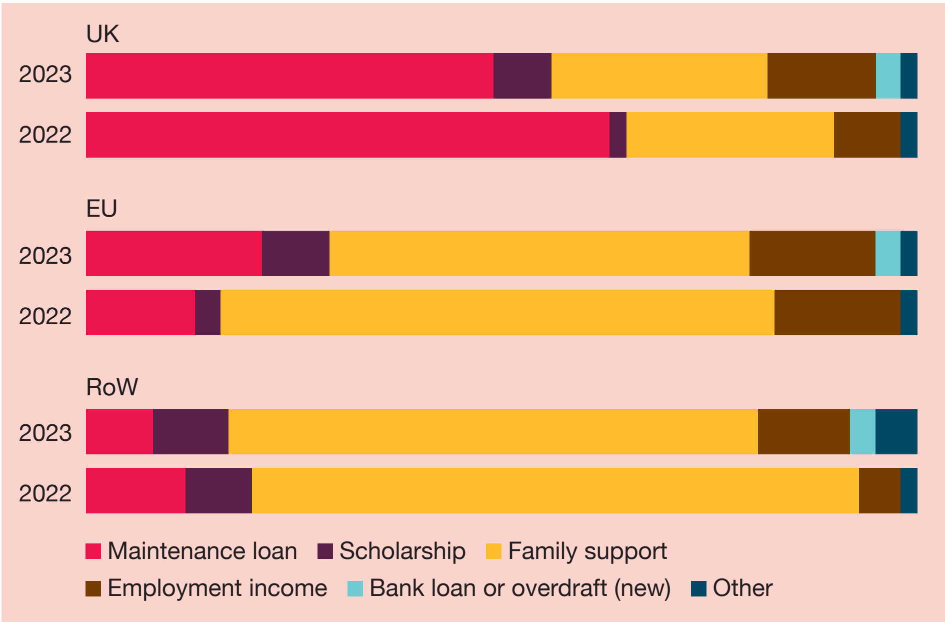
Question 18f: Table 83

However, the cost of living has dropped as an area of concern by at least 10% for each group, which is surprising considering the continually increasing costs of living in almost every area of expenditure. There could be a range of reasons for this, including but by no means limited to falling expectations of an affordable student life in the UK, or seeing the cost of living as an indirectly related factor for value for money, due to it being a 'life' as opposed to a 'student' experience.

The latter possibility is supported by connected questions such as those illustrated in the next section: Finances and the future, where we see a drop in financial support coming from families, indicating that financial pressures are being felt more in the family unit and not just by the students.

Finances and the future
International students mostly rely on funding from their families to support their living costs when studying in the UK, twice as heavy a reliance as the average student studying in the UK. EU students rely on family support less and income from employment more compared to RoW students, possibly due to the less restrictive working hours they enjoy outside visa restrictions (such as those with the right to remain under the EU Settlement Scheme).

Living costs covered by:



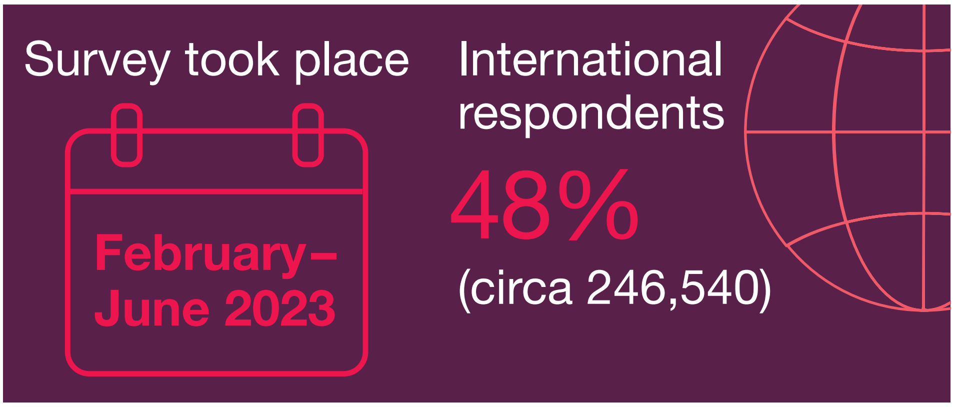
Question 18d: Are your living costs mostly covered by… Table 81

There was a significant decrease in the reliance on a maintenance loan by domestic students. This suggests that the money they receive from it is not able to cover their living expenses. The data also shows there are more students across the board relying on scholarships and employment income to subsidise their living, and less reliance on family support. This could suggest that families do not have the financial flexibility to support their children as much as they used to, due to the increased cost of living.

We can expect that cost of living pressures will also be felt by international students and their families, and possibly aggravated by how their home currency stands up against the GBP. This is reflected in the drop in reliance on maintenance loan and increase in family support. This does not necessarily mean that there are fewer students relying on their maintenance loan, but more likely the financial support does not cover their living expenses as much as it used to, requiring their family to subsidise them.

There is also an increase in international students gaining employment income. International students are constrained to a certain number of working hours due to immigration rules, and their courses are often very demanding of their time. This turn to employment suggests the financial struggle many may be facing, and may reflect the changing diversity of international students coming to study.

Postgraduate taught experience survey 2023, Advance HE



Data sourced from Advance HE through an FOI request

Overall satisfaction

	2021	2022	2023
International	81%	84%	86%
UK	77%	79%	79%

International student satisfaction with their PGT experience has risen from 81% to 86% in the past two years. It has been consistently higher than the domestic student overall satisfaction, suggesting that international students' expectations are lower and more realistic than those of their domestic peers.

The 2023 edition of the report noted that PGTs from India and Pakistan have reported an increasingly positive experience over the past four years. This is also shown in other markets that have been expanding in the UK in the past four years, such as Nigeria.

Survey respondents valued the diversity of the student cohort due to the internationalised classroom – this was due to the wider and global perspectives and the broader personal connections available. Group work and seminars were often mentioned as being valued and the most enjoyable or interesting part of the course, and this is likely to be linked to the active conversations and diversity. It was highlighted by comments that this internationalised experience on campus is a common driving force for PGTs to study abroad.

Thoughts about leaving the course

An examination of PGTs' declining satisfaction and thoughts about leaving their course revealed that there were a significant number of domestic students who wanted to leave compared to international students. This is largely due to the high expectations of the domestic students.

The highest number of international domiciled students considering leaving were Nigerians at 12%. However, the proportion of Nigerians considering leaving had dropped since 2022 (18%). Alongside Indian students, 17% cited financial difficulties as the reason they were considering this.

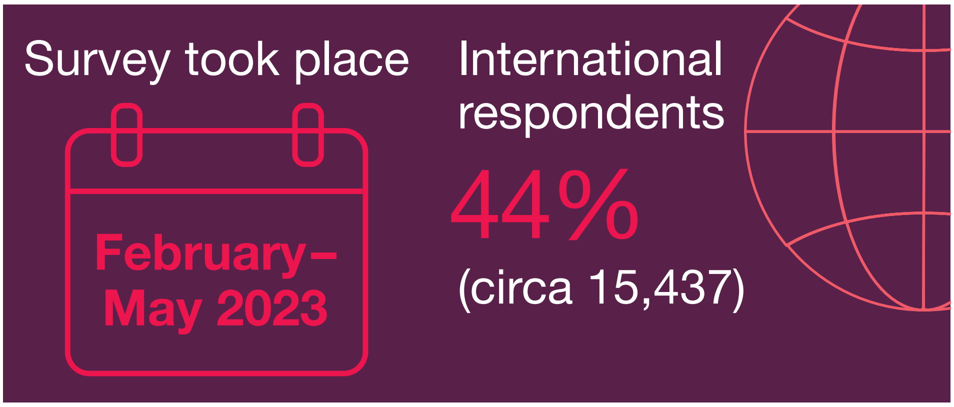
Looking at the overall international student population, the most common reason for considering leaving was the mental or emotional challenges faced (15%).

Students who had thoughts about leaving

	2022	2023	2023
International	10%	10%	86%
UK	27%	28%	79%

Concerns about the cost of living have continued to increase since the survey was run, and we might expect to see an increase in international students considering leaving, bringing the percentage close to that of domestic students. We might also anticipate other driving factors increasing and causing discontent among international students in the next edition of the survey, including the unstable policy environment and hostility felt due to negative migration rhetoric from government. This may be aggravated by the deterrent of rising visa and immigration health surcharge (IHS) costs alongside the cost of living, increasing the proportion of wealthy international students.

Postgraduate research experience survey 2023, Advance HE



Data sourced from Advance HE through an FOI request

Overall satisfaction

	2021	2022	2022
International	79%	82%	81%
UK	79%	79%	79%

International student satisfaction with their postgraduate research course (PGR) experience rose from 79% to 82% in 2022 and then fell slightly to 81% in 2023. The overall satisfaction of all PGR students has remained consistently between 79% and 82% in the last 10 years, while domestic student satisfaction has remained constant for the past three years.

However, although the change is small, the sample size is also small, so any percentage change should be considered. The fall back to 81% is therefore of slight concern, especially when the overall satisfaction for their PGT equivalent (as found in the Advance HE Postgraduate taught experience survey) and the undergraduate overall satisfaction (as found in the National student satisfaction survey 2022) are both rising.

The student experience

Satisfaction with community

	UK/Domestic	International
I have a sense of belonging at my institution	58%	66%
I feel part of a community of PGRs	55%	62%

Community is a key aspect of a good international student experience in the UK (see Student Minds' ***Understanding student mental health inequalities: international students*** (2022) for more on this). This need for belonging is even more important when students are on a research course and are less likely to have regular contact with their cohort.

International students have a relatively higher sense of belonging than domestic students. This could be due to navigating a new environment when moving country for studies and actively working to build connections with others. Domestic students are more likely to already have communities they are part of and have fewer cultural differences to navigate that could hinder building relationships; thus, they do not put in as much work to seek them out. Living in a new country can be an isolating experience, as the student cannot return home easily, so fostering a community is fundamental to a sense of belonging.

However, it must be noted that 42% of international students did not have a sense of belonging to their institution, and 45% did not feel part of a community of PGRs. This is still a significant number of students and is something institutions should focus on resolving further.

Students considering leaving

	2022	2023
International	17%	20%
UK/domestic	31%	34%

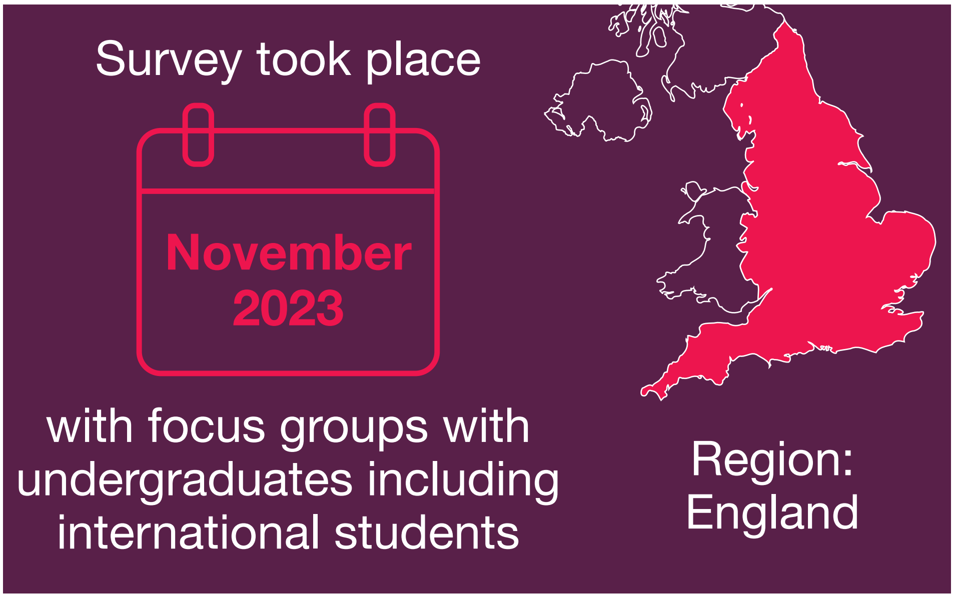
There was an increase for both international and domestic students who considered leaving in 2023 compared to 2022. Fewer international PGR students responded that they considered leaving at some point during their studies than the 14% more domestic students considering this. International students invest a large amount of energy and finances in studying in the UK and want a return on their 'investment' (coming out with a degree or gaining subsequent experience). Some have a community at home supporting them in financing their education. Moreover, international students were more satisfied with their courses.

However, there is a significantly higher number of PGR international students who considered leaving compared to PGT (10%). This is likely to be connected to the higher proportion of students who do not feel part of a PGR community or have a sense of belonging within their institution. Courses that are predominantly research-focused and self-lead often have much less frequent opportunities for building connections, which can result in feelings of loneliness.

The main reasons for international students considering leaving

Mental or emotional challenges such as loneliness or lack of a community are significant factors, while financial challenges have seen the biggest growth since previous editions of the report, suggesting that the cost of living and negative feelings about return on investment are potentially having a large impact on PGR students.

UPP Foundation Student Futures Commission: Two years on, UPP Foundation Student Futures Commission



The UPP Foundation Student Futures Commission was set up to bring together insights and ideas around successful student futures in the higher education sector. It delivers its findings across employability, student wellbeing and teaching.

In 2022, it published a report on international students, highlighting the need for supporting employment ambitions as a focus for this student body. This need has been backed up by research from organisations like IDP Connect, which has found that international students base their education destination on certain factors, including postgraduate employment opportunities and employability support.

The commission has since published its annual report on student futures, surveying higher education students studying across England. It examines the three focus areas, and there are some particularly interesting comparisons between international and domestic students.

Fostering a sense of community
When coming to a new country, international students need to build a community and sense of belonging, and actively look for opportunities to meet and socialise with other students.

It was found that between Autumn 2023 and the survey in November, international students were more likely to have tried an activity at least once or twice (36%) than domestic students (29%). They were also more likely to attend these events monthly. Only 19% of international and 27% of domestic students never attended such events.

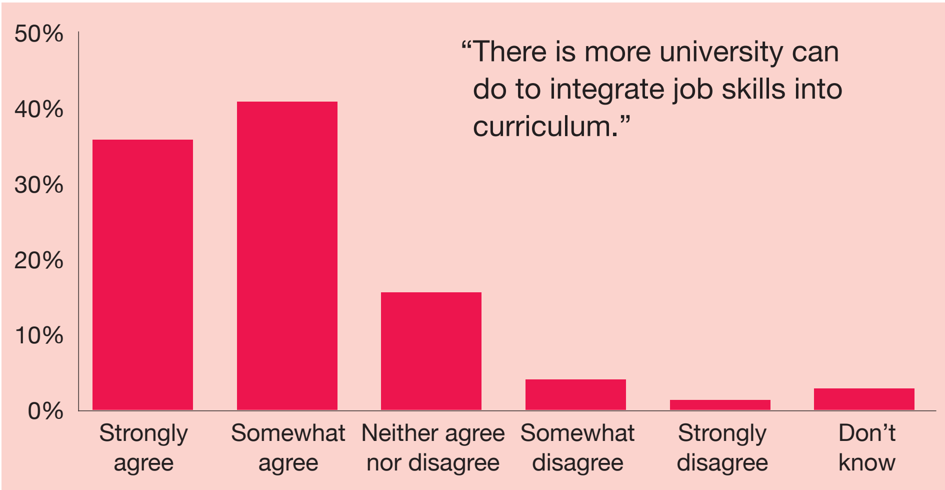
From this, we can understand the value that international students place on extracurricular activities and opportunities to feel part of a community. Having a community helps students to navigate their new environment, and institutions are key to supporting in this. Over 90% of all students agreed that it is important to feel part of their university community. Further, over 60% of all students agreed or strongly agreed that they felt a sense of belonging at their university, and only 10% of international students disagreed or strongly disagreed.

We can see that from the students surveyed, university efforts to welcome and support students, especially international students, in building a community both in their new country and on campus is fairly successful. However, it is worth noting that although 68% of international students supported the statement, “I feel like I belong at my university”, over 30% did not.

Additionally, 30% of international students reported that they feel lonely at their university. This suggests that, although they may feel a sense of community, the connections they make may not be deep ones. It is worth considering that many international students who responded may have only been in the UK for months at the time of the survey, and deep connections can take time to build.

UKCISA insight: Institutions should celebrate the progress they have made in fostering this sense of belonging and community for students but ensure that they do not rest on their laurels in years to come. With dropping enrolment numbers and negative policy and political rhetoric deterring international students, it is all the more critical for institutions to work hard to ensure that students will enjoy their time studying in the UK and feel able to recommend it as a study destination to a friend, not only based on academic but also community experiences.

Employability and support
Students taking part in the survey were asked the questions, with international student responses below:



International students have a strong belief in the transferable skills and knowledge gained in their degree, with the percentage of those who strongly agree being higher than domestic student respondents (19%). As international students often pay more for their education in the UK, this may be due to them actively looking for more opportunities within their learning or being generally more aware of wanting to take these opportunities. It could also be the case that some respondents are able to make comparisons with the standard of education in their home country and place a higher value on the usefulness and quality of transferable education in the UK.

However, when asked whether institutions can do more to integrate job skills into the curriculum, 77% agreed or strongly agreed, 7% more than domestic students. International students highly value postgraduate employment opportunities and see their studies as an investment towards that. To stay competitive, UK institutions must ensure that employment skills are clearly embedded into the curriculum and that students are made aware of such skills.

UKCISA insight: One way to diversify the offering of skills within the curriculum is to integrate and reward participation in volunteering, part-time jobs and extracurricular activities. Educating students in the transferability of skills will ensure that they recognise opportunities and understand the skills gained throughout their student experience, not only in the classroom. Part-time jobs and extracurricular activities will help them foster a sense of belonging and support them in their graduate journey.

International student perspective UK: evaluating experiences and perceptions of studying abroad in the United Kingdom, Erasmus Student Network (ESN) UK

Survey took place

March – May 2023

International respondents

1,003

student responses across 49 higher education institutions in the UK

The survey by ESN UK aimed to evaluate the experiences of students in the UK and their perceptions of the UK as a study destination, including perceptions of those who had not studied in the UK. The survey was conducted following the perceived impact of challenges (accommodation shortages, visa costs, English tests, and so forth) felt by the international student, and especially by the educational exchange population in the UK. Recommendations for the sector are provided, including the need for better consistent publicly available data on international students in the UK.

One of the alternative perspectives this survey provides, compared to others referred to in this Annual policy review, is that the majority of respondents are of European domicile, and over 40% were in the UK on mobility for one semester, presumably on an exchange programme. This is verified by the fact that over half the respondents were funding their mobility through ERASMUS+ grants, and another 10% were receiving funding from their ‘sending university’. 68% of respondents were also studying for their Bachelor’s degree.

Considering the drop in EU students in 2021/22 (HESA), this report provides a valuable insight into the views of prospective, current and past students from the EU.

The main barriers to studying in the UK

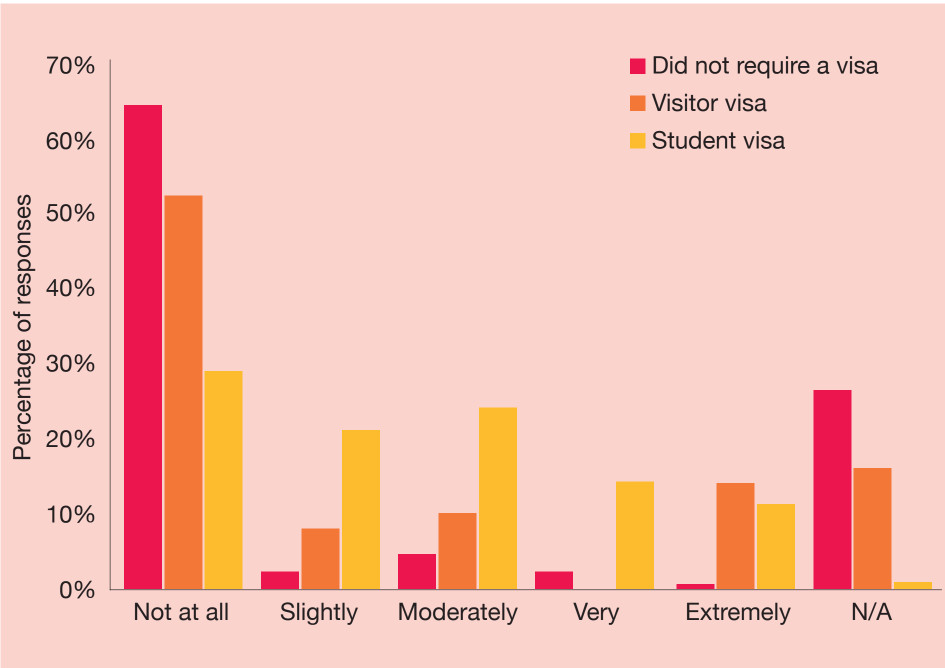
Price of accommodation	Availability of accommodation	Cost of living
70% respondents thought this was a very or extremely significant barrier	65% very or extremely significant barrier	57% very or extremely significant barrier

Visa issues

Respondents from the UK were significantly more likely to respond that visa issues were a problem than those who studied elsewhere.

UK respondents were twice as likely to say that getting a visa was very or extremely problematic.

Half the respondents who were mobile in the UK used a Student visa. Many issues surrounding the visa application and issuance were in relation to the visa application process and the advice given to students by UK institutions. Specifically, many flagged delays in issuance of confirmation of acceptance for studies (CAS) and being without their passports for months on end. Many respondents ended up having to pay for the priority or super priority service in an attempt to have their visa issued in time.



Although 44% responded that obtaining a visa to study in the UK was not a barrier, 44% also said that it was a problem to varying degrees. ESN UK attributed the former result to many respondents who were on the Standard Visitor visa opposed to the Student visa. This highlights that there is a clear difference in perceptions of getting a visa when a Student visa is required.

Obtaining a visa was considered to be a greater problem for international students in the UK than elsewhere.

Recommendations include extending the period for which students can study in the UK on a Standard Visitor visa from six to 12 months, and reducing delays in CAS issuance when possible.

Accommodation

- The majority of respondents rated their accommodation positively.
- Over 80% of respondents had some sort of problem with the availability of accommodation, and 30% responded that this was extremely problematic.
- One third of students in the UK strongly disagreed that they had received enough support from their institution in finding accommodation.

The availability of accommodation is a pressing issue in many popular student destinations globally. The pandemic and cost of living are pushing up building and rental prices, so that, even when new accommodation is built, it may not be affordable for students.

Monthly housing costs were researched, with findings showing around half spending over €600 per month. ESN UK shows the comparison with the average expenditure of mobile students in Europe, where only 20% of students spent over €600 per month on accommodation. Although accommodation is an issue for **international students throughout Europe**, it is particularly prominent for those studying in the UK.

The UK has been facing shortages in accommodation in recent years, which the report highlights. However, the most interesting responses in relation to accommodation are those to the question statement, "I received enough support from my host university in finding accommodation".

33% of respondents strongly disagreed with this statement, and 48% disagreed overall. This is the highest rate of "strongly disagree" responses in the entire report. Respondents who studied elsewhere also reported substantial dissatisfaction with support from their institution. Qualitative analysis indicated that students expected more communication on how far in advance to try to secure accommodation and help to gain housing on campus. It is clear expectations were not met, and institutions must ensure that expectations are set to a realistic level upon application.

Recommendations include having dedicated university staff to provide accommodation support for incoming students and to provide guarantor services (either within the university such as University College London (UCL)'s rent guarantor scheme or by partnering with services that act as guarantors).

Perceptions of the UK

91% enjoyed their time in the UK	58% perceived the UK as a welcoming place for international students

Post-Brexit, only 19% responded that their perceptions of the UK had changed. Many elaborated on their response, with the general sentiment being that leaving the EU made the prospect of studying in the UK more expensive and complicated. Words used frequently were "difficult", "expensive" and "harder".

Responses included:

"It feels as if the UK has taken a step away from the rest of Europe and as such is less welcoming to EU citizens."

"I consider the UK to be more closed to foreigners now."

"It gives me the impression that the country is not open to multiculturalism."

Recommendations include more positive branding on studying in the UK in relation to what matters most to students and better promotion of current mechanisms in place to study in the UK.

8

Digital experiences

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8. Digital experiences

There has been much talk of the digital student experience, a conversation that has been kindled by the COVID-19 pandemic. Having access to recorded lectures, virtual tutorials and online platforms has allowed for pedagogical enhancements like never before and keeps teaching quality competitive.

However, we must be mindful as a sector that international students have their own experiences of technology in (and outside) the classroom. Expectations, skills and access differ greatly. Care must be taken to ensure that there is access and equity for all, while providing the high-quality teaching that students come to the UK to receive.

Jisc released two reports on the topic in April and November 2023. The first focused on understanding the international student digital experience from the stakeholder perspective and was a combination of literature review and reports from key UK organisations, institutions and practitioners who work with international students in the UK.*

The second report gathered the views of international students from 14 higher education institutions across the UK through a survey and workshops, in which they shared their perspectives and provided recommendations to the sector on how best to improve these digital experiences.

**Although these reports have been built on institutional and international student input from higher education providers, the findings and recommendations are equally applicable for other educational providers that take international students, such as further education institutions and pathway providers.*

International students' digital experiences phase one, Jisc

Reviewing current data, literature and contributions from various UK higher education representatives and academic professionals, this report mainly focuses on barriers found in the digital experience. Contributory factors to such cultural differences include language and cultural differences and digital 'shock'.

There are a few underlying major themes throughout the report, one such being that international students are likely to experience digital systems and tools differently from domestic students. Moreover, international students are likely to experience them differently from each other, depending on their background and previous experiences, and they cannot be treated as a homogenous group.

The move towards blended learning post-COVID-19 is reshaping the delivery of teaching, with a focus on online and digital modes used to enhance pedagogy. Efforts must be made to tailor approaches to support the students' digital learning journey.

Diversifying groups
The number of international students has been rising over the last 10 years (UCAS, HESA) with increases in diversity in country of domicile and nationality, and particular shifting student demographics towards India and Nigeria. There has also been a rise in postgraduate study, and over half the PGT student population is now international.

The digital experiences of international students differ in terms of access, support and barriers to online learning, and

21% of international students flag mobile data costs as a notable challenge for them.

Differences in digital readiness and maturity across countries further impact the digital experiences of international students, highlighting the need for tailored approaches to support their digital learning journeys.

The report aims to prompt conversations and considerations across universities to enhance the digital experience for all students and align it with the changing landscape of global education dynamics and student expectations. It suggests that equitable digital experiences should be facilitated by proactive support strategies (including initiatives like laptop loan schemes and digital training) and customised support that are integrated across the student experience.

Digital (cultural) shocks
The point of ethnocentrism is made – those of us who live and work in the 'West'[1] may only be able to perceive (or think we perceive) digitalisation through our own Western experiences. Many do not consider the digital disparity that people may face if moving to the UK, especially those who come from countries that are lower on the scale of digital readiness.[2]

As such, the transition issues for international students moving to the UK may be unrecognisable until they arrive, impacting effective teaching and support strategies. Variations in digital experiences in China and Nigeria, such as accessibility and the cost of technology, affect students' abilities to engage in online learning. The shift to a higher level of online learning prompted by COVID-19 revealed such disparities in technology, connectivity and skills, which affect students' ability to engage effectively.

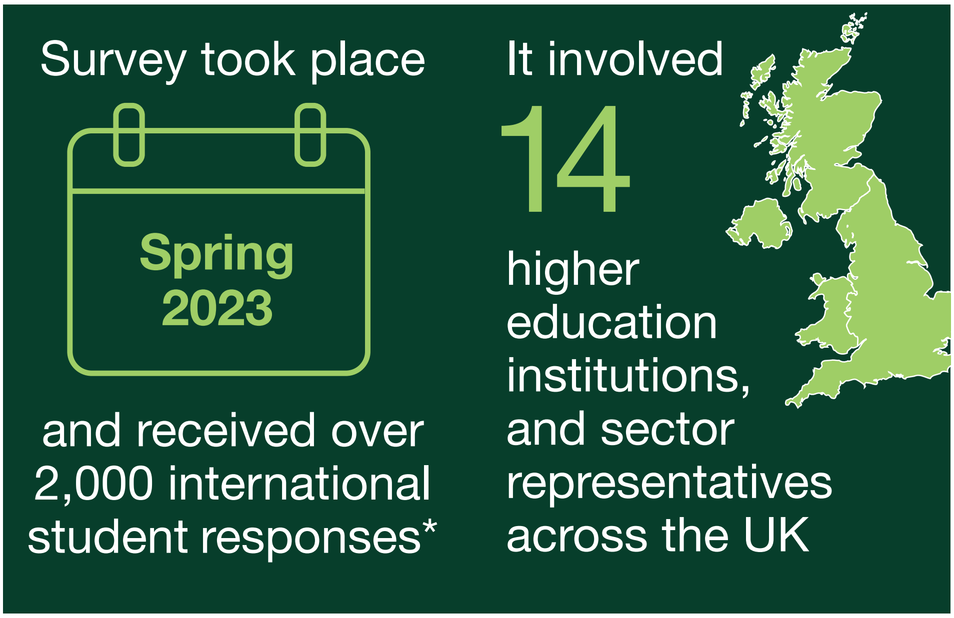
'Digital shock' and 'digital border crossing' are terms used by Jisc to highlight the level of cultural shift faced by students. There is a real cultural difference in device usage and online learning approaches from that in their home country that students may have to navigate and adapt to in their new environment.

[1] Jisc defined this as UK, USA, Canada, Australia and New Zealand – countries that have contributed significantly to the software and online pedagogy that is currently predominant in global online higher education.

[2] Jisc measures this through the Network Readiness Index created by the World Economic Forum in 2019.

Suggestions for institutions include preemptive engagement, facilitating support from expat communities, and embedding international perspectives in curricula to support these digital transitions effectively. Biases towards non-'Western' viewpoints must also be addressed to foster systemic equity in intercultural learning settings, which can be helped through exposure. Recommendations for funding for global social activities and study-abroad opportunities are given to this end.

International students' digital experiences phase two, Jisc



**Most survey participants came from the African or Indian subcontinent global home areas.*

This second report in the series hears directly from international students, exploring the diverse experiences highlighted in the previous edition. It covers comparisons between expectations and reality in onboarding, the virtual learning environment, assessments, and differing access to internet, digital skills, and technical problems faced, all of which differ depending on the student.

Making sure that there is appropriate and customised support in place ensures that international students get the experience they expect and helps them to enter the job market prepared with digital skills required for the modernising workforce. Making sure that the support is in place to keep UK higher education competitive subsequently keeps international students coming to the UK to study, bringing intercultural diversity to the domestic learning experience.

Having looked at how institutions should consider international students in digital strategies, this report makes recommendations that focus on enhanced communication channels, strategic planning for inclusivity and incentivising engagement.

Findings

- **Online behaviour is greatly influenced by global home area, gender, age and first language.** This can determine whether students feel comfortable turning on webcams, participating in online polls, and opening microphones to share thoughts or ask questions.
- **Many students use artificial intelligence to support their learning in practical ways.** Demographics can indicate who is more likely to or more confident in using various forms of artificial intelligence than others but would appreciate more guidance on boundaries and best practices to support this use.
- **Digital shock.** Students often struggled to compare their UK digital experience to that in their home country due to the degree of difference. They believe that they would benefit from more pre-arrival information on the expected use of digital technology on their course, and guidance on how, when and why to use the digital method of learning throughout their course.
- **Student expectations pre-arrival compared with reality differed and should be better managed.** Especially postgraduate students anticipated more face-to-face learning, and less digital learning and self-study, but when coming to the UK they found the opposite.

Recommendations

The report gives an extensive list of recommendations for higher education institutions to try and support these international students through digital learning and digital shock while managing their expectations and ensuring equitable access. Below are just some of these recommendations.

Pre-arrival

- Provide clear information and expectations on technology use, device requirements and self-directed learning for their course (both on and off campus).
- Provide information on how to access the internet on and off campus and the reliable use of Wi-Fi versus mobile data in the UK.
- Offer tailored pre-arrival support based on students' digital experience.

On arrival

- Give an overview of university digital systems, apps and resources that the institution provides and/or they may find useful, with cultural differences (both in digital and communication styles) in mind.
- Provide digital support delivered by international student volunteers with clear signposting and easy communication channels for them to ask questions and meet their peers.
- Manage expectations around communication at the start of the course, including which communication channels are most and least often used, how often students should check their emails, and how quickly they might expect responses to emails.

During the course

- Ensure good-quality audio and captions for recorded lectures that correctly describe subject-specific terminology.
- Educate students on artificial intelligence use, digital resources, and the balance of supportive technology, while developing their own critical voice.
- Foster curiosity for what digital resources and communication methods students are familiar with and consider introducing them to teaching to enhance crosscultural digitalisation and the development of skills.
- Maintain online and face-to-face spaces for students to share anonymous feedback, access personal tutors and wellbeing support, and develop online communities.

All support offered should be tailored to the student and align with institutional strategies for digital transformation, equity and inclusion.

9

Accommodation

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9. Accommodation

The 2023/24 academic year has seen a substantial shift in pressures on accommodation. Whereas the previous year saw increased international student numbers and demand for cheaper housing, sometimes housing suitable for families, the beginning of 2024 has seen hints of the start of a drop in student numbers.

Policy shifts will likely lead to a changing profile of demand for housing as different demographics are impacted by political narrative, cost and attractiveness of the UK. Naturally, the student demand and changing demographics will differ across towns and cities, and thus both private-sector rental and purpose-built student accommodation (PBSA) demand and supply will shift.

It is noted that there are many companies that provide information on student accommodation and the wider market, such as Unipol and StuRents.

Student accommodation, Cushman and Wakefield

Headline data

+50%
Bristol has seen the highest rate of private sector rental growth since 2013/14.

2.1:1
is the current national average student to bed ratio*.

Cardiff
is the current most affordable student location in the UK.

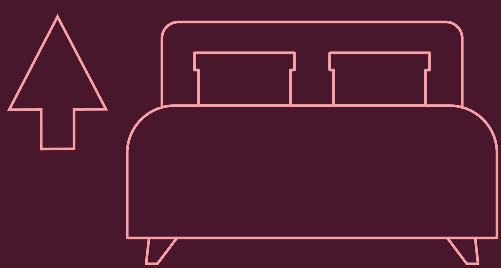
**based on HESA 2021/22 student outcomes data. The 'current' ratio is estimated to be more balanced.*

Affordability

Supply

Biggest in-demand pool for beds since 2013/14 are in:

London
Birmingham
Bristol



Biggest market drops in demand-pool for beds are in:

Southampton
Canterbury
Plymouth

Greatest percentage of international students in the demand pool are in:

Hatfield – 78.17%
Coventry – 75.14%
St Andrews – 74.84%
London – 68.82%
Huddersfield – 66.78%

Such high proportions of international students in these locations can bring risk.

Rental growth

2023/24 has been the highest year for rental growth at 8.02%. This is due to a number of factors, including the need to cover ever-increasing energy and staff costs in the current inflationary environment. Ultimately, this is going to reduce the number of beds that are affordable for many students, domestic and international alike.

Average price per week

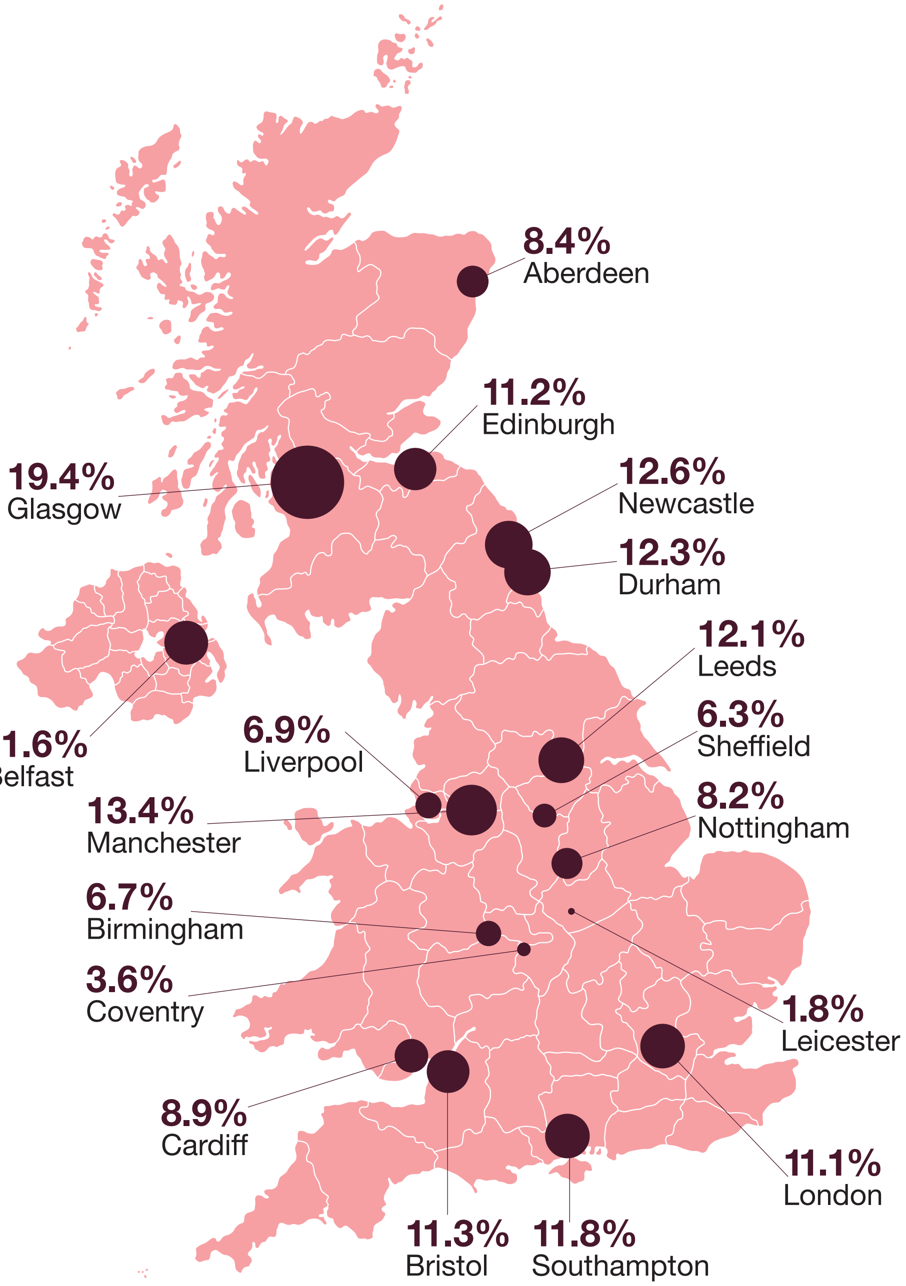
London £323.07 private sector	London £208.79 university rent
Excluding London £174.45 private sector	Excluding London £158.57 university rent

For each nation:

	Private sector	University rent
England	£197.88	£168.29
Scotland	£201.77	£150.16
Wales	£161.61	£140.31
Northern Ireland	£173.95	£134.34

Source: FOI request to Cushman & Wakefield

Private sector rental growth 2022/23 to 2023/34



Source: Cushman & Wakefield student accommodation tracker 2023/24

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Outside London, the most expensive areas for rental accommodation are Edinburgh, Bristol, Glasgow, Manchester and Nottingham, all of which are above the UK average weekly rental price at over £200 per week. Glasgow has seen a higher spike than any other city, with many rooms now costing similar to those in outer London.

The cost of rooms of all quality across the board has risen in past years, with premium accommodation increasing in cost by £12.5%. Scotland's rental increase is being driven primarily by Glasgow and Edinburgh's high rental costs, with particularly high international student numbers studying at both institutions.

On the other hand, there are some Russell Group cities that have rental costs 30% lower than their peers situated outside London: Cardiff, Newcastle, Sheffield and Liverpool. These institutions are less popular for international students, with Sheffield falling to thirteenth place in top international students by numbers in 2021/22 (HESA), and Cardiff University falling to twenty-seventh place.

The sector must continue to reiterate to companies the needs of international students and the changing demographic to PBSA. It is important for the student experience to include available and affordable accommodation and, with the diversifying market, many students are often looking for cheap options, especially with the current cost of living and increased visa and IHS fees.

Appendix of publications

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Appendix of publications

Advance HE (November 2023) *Postgraduate research experience survey 2023*

Advance HE (November 2023) *Postgraduate taught experience survey 2023*

All Party Parliamentary Group for International Students, IDP Connect (July 2023) *The Graduate visa: an effective post-study pathway for international students in the UK?*

Association of Colleges (November 2023) *Enrolment survey summary report*

Chartered Association of Business Schools (November 2023) *2023 Annual membership survey*

Chartered Association of Business Schools (February 2024) *Analysis of international student enrolments in January 2024*

Cushman and Wakefield (September 2023) *UK student accommodation report*

Erasmus Student Network and European Students' Union (July 2023) *International student housing: how are exchange students navigating the housing crisis?*

Erasmus Student Network United Kingdom (September 2023) *International student perspective UK: evaluating experiences and perceptions of studying abroad in the United Kingdom*

HEPI and Advance HE (June 2023) *Student academic experience survey 2023*

HEPI, UUKi, Kaplan International Pathways, and London Economics (May 2023) *The benefits and costs of international higher education students to the UK economy*

IDP Connect (March 2023) *Emerging futures 3*

IDP Connect (August 2023) *Emerging futures 4*

IDP Connect (March 2024) *Emerging futures, voice of the international student*

Jisc (April 2023) *International students' digital experiences phase one: a review of policy, academic literature and views from UK higher education*

Jisc (November 2023) *International students' digital experiences phase two: the experiences and expectations of international students studying in UK higher education*

Migration Advisory Committee (December 2023) *Annual report 2023*

NCUK and Nous (March 2024) *The power and impacts of pathways*
Office for Students (August 2023) National student survey 2023

PwC (January 2024) *UK higher education financial sustainability report*

Quacquarelli Symonds (September 2023) *The recruitment edge: UK*

Scottish Government (February 2024) *Scotland's International Education Strategy*

Student Minds (July 2022) *Understanding mental health inequalities: international students*

UPP Foundation Student Futures Commission (January 2022) *International student futures: developing a world class experience from application to onward career*

UUP Foundation Student Futures Commission (March 2024) *UUP Foundation Student Futures Commission: Two years on*

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