# Annual policy review

2022-23

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# Contents



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# Introduction

UKCISA Annual policy review brings together key updates, statistics and reports relating to international students, providing an easy way to keep up to date with the changing landscape of the sector. This second edition covers major sector updates from April 2022 to March 2023.

As we learned to live with Covid-19, 2022 saw the majority of borders around the world open again and students returning to face-to-face teaching. With this, came the diversification of sending markets and modern methods of teaching, shifting mentalities towards technology being used to enhance learning and increasing numbers of international students arriving in the UK from a wider range of countries.

Alongside this educational and mobility landscape, there was a surge in sector support for international students affected by global crises, such as the war in Ukraine, the earthquakes in Turkey or the financial crash in Sri Lanka. Institutions demonstrated their dedication and united to provide help by any means they could.

It was a turbulent political time in the UK, as 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. Despite this rapid change in national politics, international student numbers continued to grow, and the UK remains one of the top global destinations for study.

1

# Overview of the year

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With a return to face-to-face teaching in the UK, international students are studying on campus in increasing numbers. The 2021-22 academic year saw the all-time highest intake of students, with 679,970 students arriving from overseas to study. As Covid-19 is no longer affecting travel, prospective students are giving greater priority to graduate opportunities and the cost of living when considering countries of study.[1]

Canada, a rival higher education market, has taken steps to give itself a competitive advantage for those studying full-time degrees, while also alleviating its labour shortage, by removing the cap on off-campus working hours until December 2023.[2] Australia has also lifted the cap on working hours for students and extended its equivalent to the UK Graduate route visa from two to four years for bachelor's degree students, from three to five for master's students, and from four to six for PhD students (degree dependent).[3]

Housing has been a growing concern over the past year, with shortages across major cities around the world, including in the UK.[4] Although these shortages impact the general public as a whole, students are particularly affected. This lack of housing has been partly due to inflation, many landlords leaving the housing market, the increase in students returning to campus study following remote learning during the pandemic, and to deferrals from previous years. The knock-on effect of the UK Government's success in markets outlined in the International Education Strategy, combined with continued growth in overall student numbers, has led to growth of student dependants and pressure on certain housing types. Due to these same factors, it appears that available accommodation will continue to present a challenge for the education sector in the near future.

The UK higher education sector is ambitious and continues to develop strategies to retain its global reputation. The International Higher Education Commission was launched by former Minister of State for Universities, Science, Research and Innovation, Rt Hon Chris Skidmore MP, to inform recommendations for a future UK International Education Strategy, in the development of which UKCISA, as part of the commission, will play a part. London Higher also published its own International Education Strategy for London with the purpose of giving London the platform and tools needed to play its role in the wider UK international education ecosystem.

1 QS higher education briefing: Is COVID-19 still impacting student decision making?' pp. 5, 7, Quacquarelli Symonds, 2022

2 https://www.canada.ca/en/immigration-refugees-citizenship/news/2022/10/international-students-to-help-address-canadas-labour-shortage.html

3 https://ministers.education.gov.au/clare/post-study-work-rights-international-students-boost-skills

4 Glasgow students without flats told to consider quitting university - BBC News.
Update on student accommodation capacity issues in Manchester | StaffNet | The University of Manchester

2

# Headline data for international students in the UK

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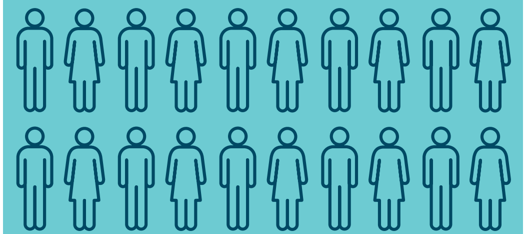
# The state of international HE in the UK 2021/22, HESA

Despite the fall in European Union (EU) students studying in the UK, international student numbers continued to break UK records in the 2021-22 academic period. Last year saw a further 13% rise, following the UK International Education Strategy target of 600,000 international students being met almost a decade early.

**679,970**

international students studied in UK higher education in 2021-22



International students accounted for

**24%**

of the overall student population

Rest of world (RoW) students made up

**82%**

of the total international student population in the UK

**4%**

were EU students

**16%**

were non-EU students

When only the 636,060 full-time international students are taken into account, the percentage of these students in the overall full-time student population rises to 28% (previously 26%).

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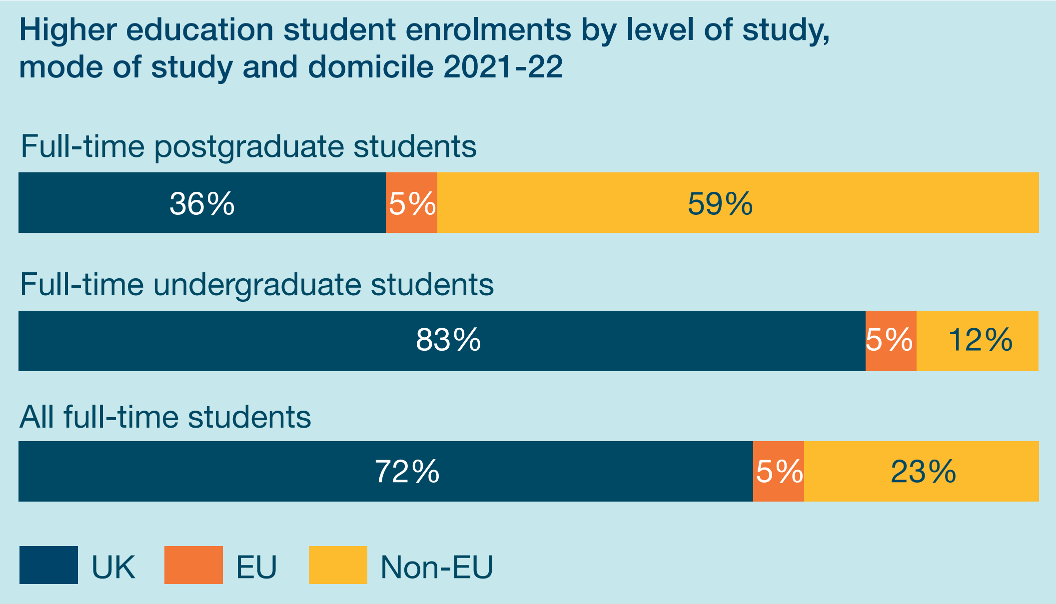



*Source: Calculations from HESA (2022) HE student data: Who's studying in HE? Figure 3*

The proportion of undergraduate international students remained unaltered from the previous year. However, there was a large spike in the number of international students in the postgraduate full-time student body.

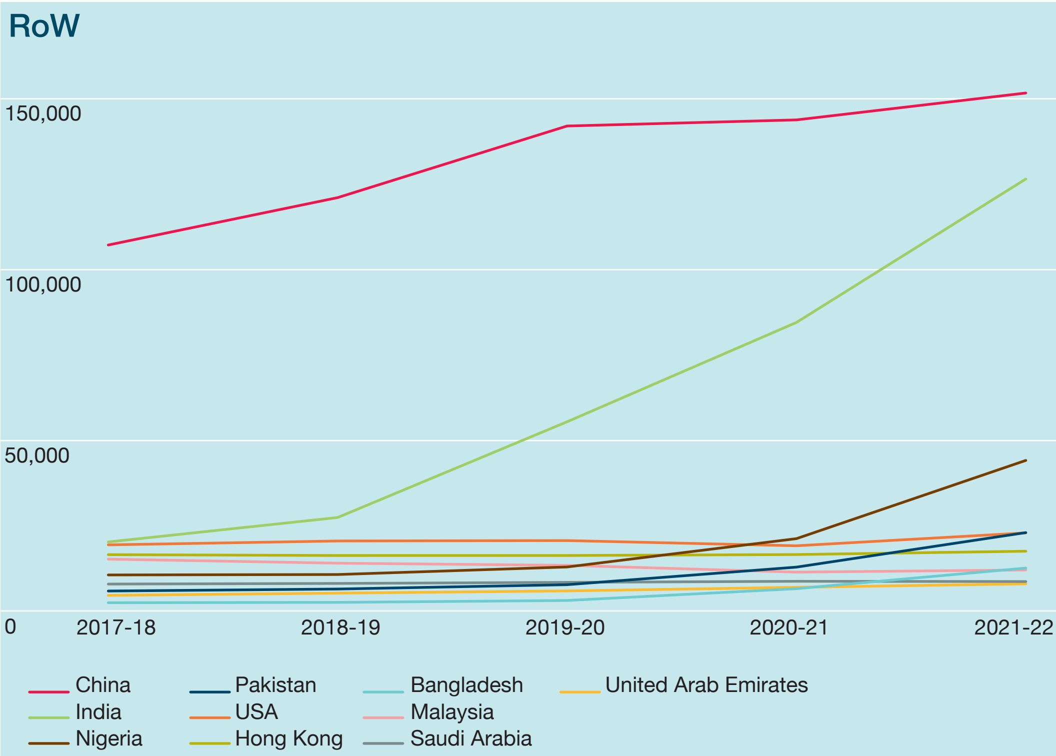
- International students accounted for 64% of postgraduate full-time students (56% last year).
- 59% of these postgraduate full-time students were RoW (previously 49%).

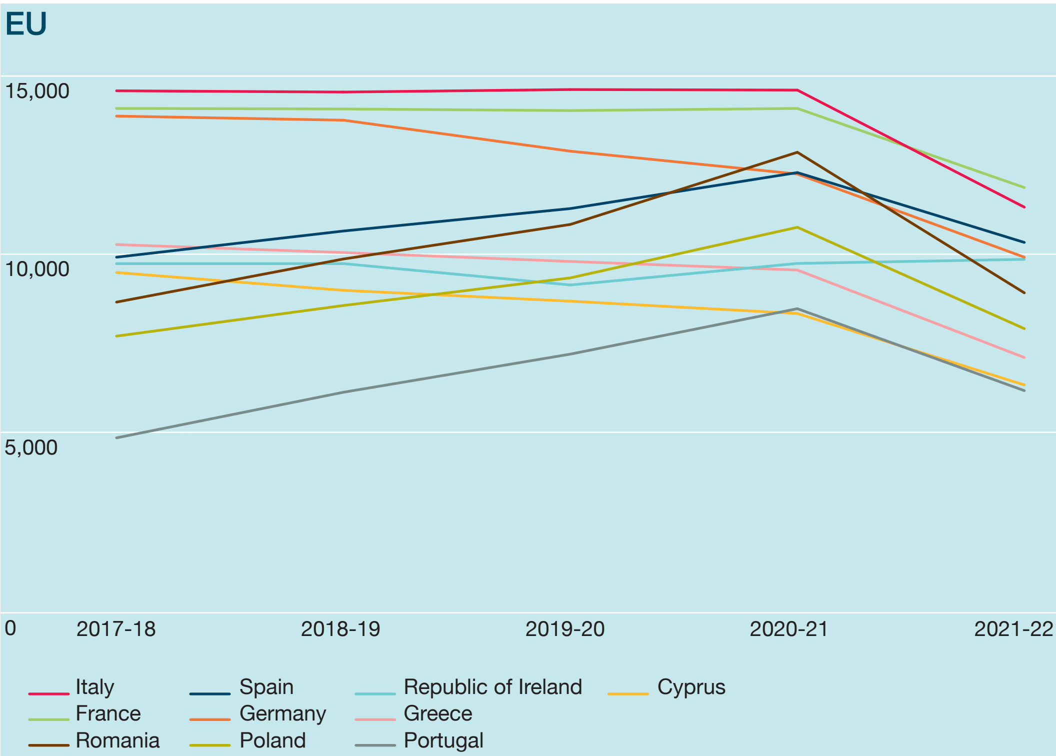
There was a significant decline in the number of first-year EU students in the UK. Student numbers dropped from 66,680 in 2020-21, to 31,400 in 2021-22. This drop in over 50% of first-year EU students is largely attributed to the increased tuition fees that EU students now pay as a result of Brexit and the added cost of a visa. It is expected that this drop will be reflected in the ratio of EU students coming to the UK in future, as current EU students graduate.

Despite this EU drop, there is still an overall increase in international student numbers. First-year international students have increased by 13% since 2020-21.

# Where do international students come from?

## Top sending countries

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## First degree top sending countries 2021-22:

### EU

**Ireland 4,415**

Ireland sent 4,415 first-year students to the UK – a decrease compared to the previous year (4,570).

**France 4,355**

France also decreased its international student sending from 6,630 in the previous year.

**Germany 3,695**

German students fell by 20% compared to the previous year.

**Romania 1,015**

Romanian students have significantly decreased in the past five years, with only 1,015 first-year students.

**Spain 2,725**

Spanish students have also greatly decreased, falling to 2,725 first-year students from 5,435 the previous year. This signifies a future drop in Spanish students in the UK.

### RoW

**China 99,965**

**India 87,045**

**Nigeria 32,945**

Bangladesh and Pakistan both experienced a spike in first-year students in the UK, doubling from the previous year.

In the past five years, India has almost tripled the number of first-degree students it is sending to the UK. Malaysia dipped by 30% from 2017-18 during the pandemic and is only starting to recover, but has risen to seventh place in rankings due to the decrease in first-year EU students.

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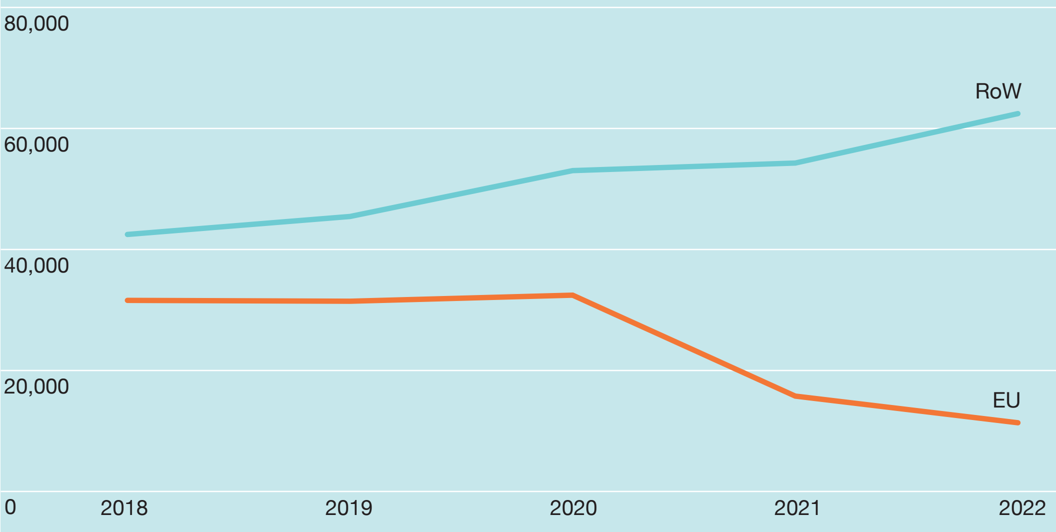
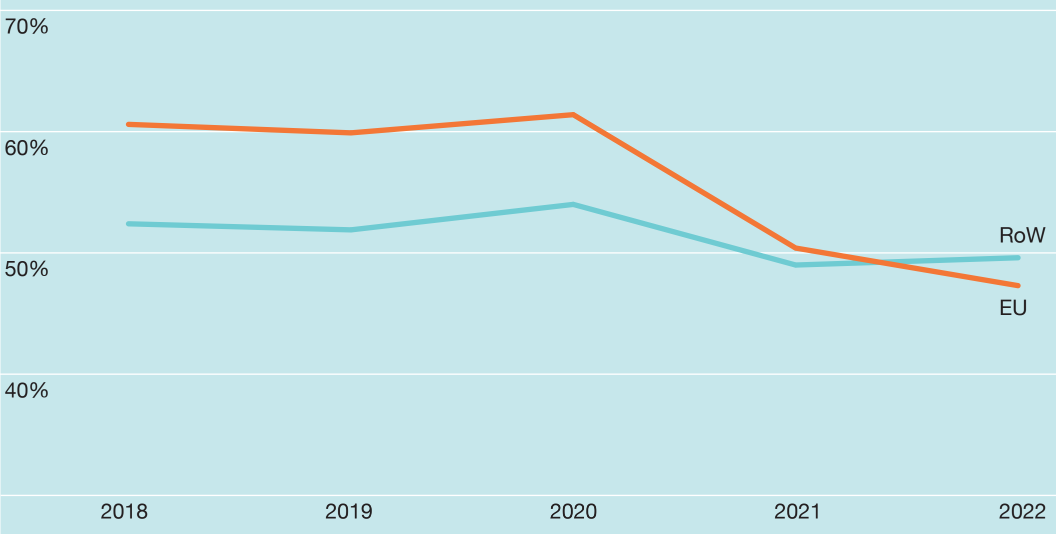
## UCAS undergraduate end of cycle data 2022

### Accepted applicants by domicile




### Proportion of applicants who were accepted




Growth of the international student body continues to expand. In total, there were 73,815 accepted students, an increase of 5.4% from the year before.

Chinese students represented the most accepted applicants: 37,020 in 2022, an increase on 32,600 from the year before. India remains the second largest market with 6,610 placed students (up 43.7%), and Nigeria the third at 1,990 students (up 32.7%).

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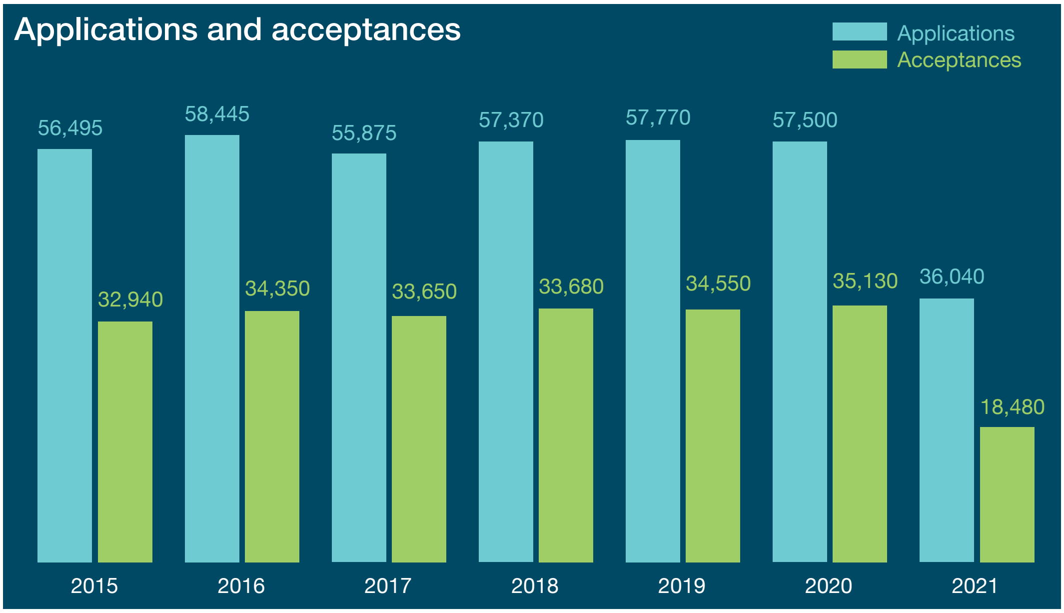
UCAS and College Board insights forecast a 46% international undergraduate applicant rise to UK institutions through UCAS by 2026 and show that there are different driving factors for study in the UK, depending on domicile. 75% of Indian students listed UK higher education to be perceived as of “better quality”, whereas the focus of 80% of Nigerian respondents was on gaining employment skills. In general, 54% of applicants perceived prospects after graduation as their highest priority.

## International student recruitment from Europe: the road to recovery, Universities UK International, Studyportals

This report – the third part to the Universities UK International (UUKi) series, *Why aren’t we second?* – examines the impact of Brexit across different student recruitment markets throughout Europe. The strong underlying recommendation given is that if the UK wishes to retain its share of the European student market, it must invest more in recruitment from these regions.

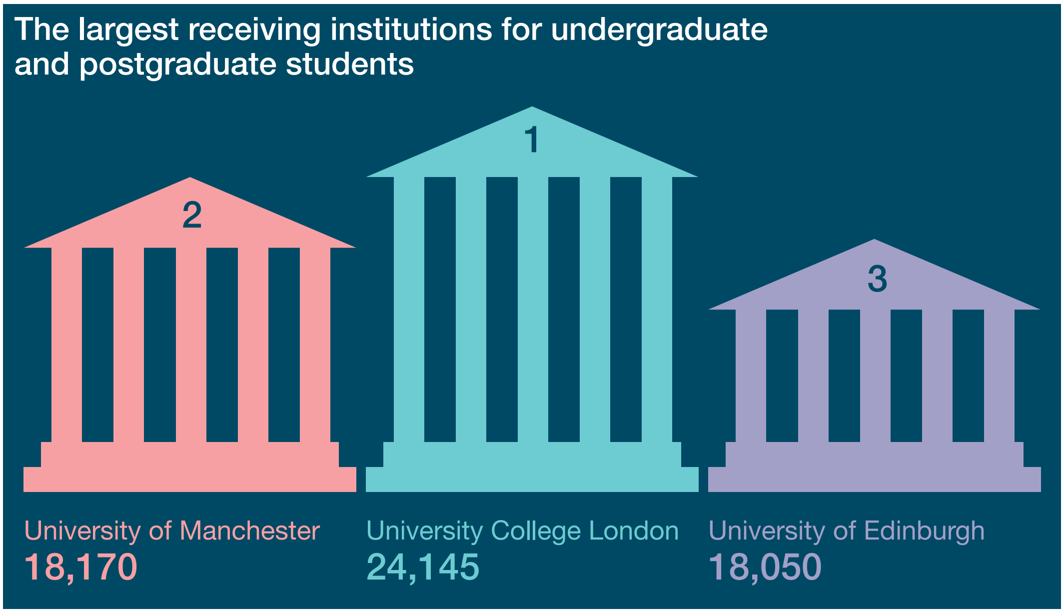



UCAS data show a significant drop in applications and acceptances in EU applications, explaining the 50% fewer first-year EU students in 2021-22 compared to 2020-21. Further, Studyportals revealed a 28% drop in European page views of UK courses between June 2019 and May 2022. European students seem to be going elsewhere for their higher education: the Netherlands, Germany and Italy have an increasing number of English-taught courses that have spiked in interest, as have more traditional competitors like Canada that has seen an 11% increase in study visas issued. The report attributes this European loss to Brexit and notes that the EU market in the UK will never be the same, despite a slight recovery.

Finally, there is a recommendation to UK universities to ensure that Europe is not only part of their recruitment goals but a focus market.

Despite the loss of European students and an increase in RoW students, there is a danger in relying too heavily on non-EU markets as a growth strategy. As the report states: "We cannot be certain that growth from these markets will be sustained."

## Where do international students study? By nation

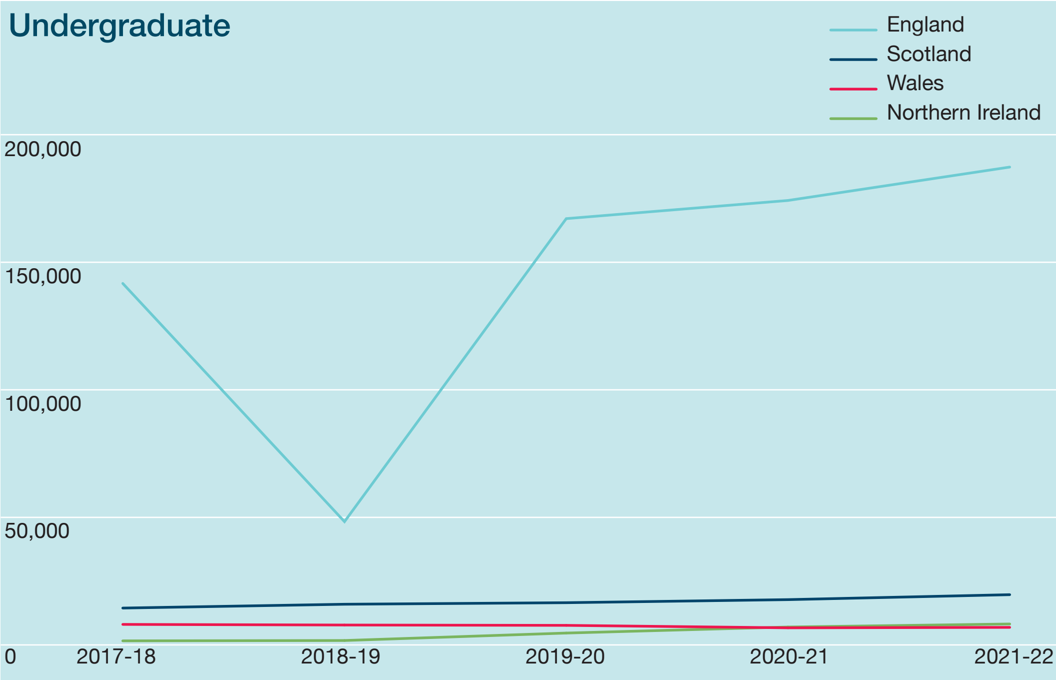


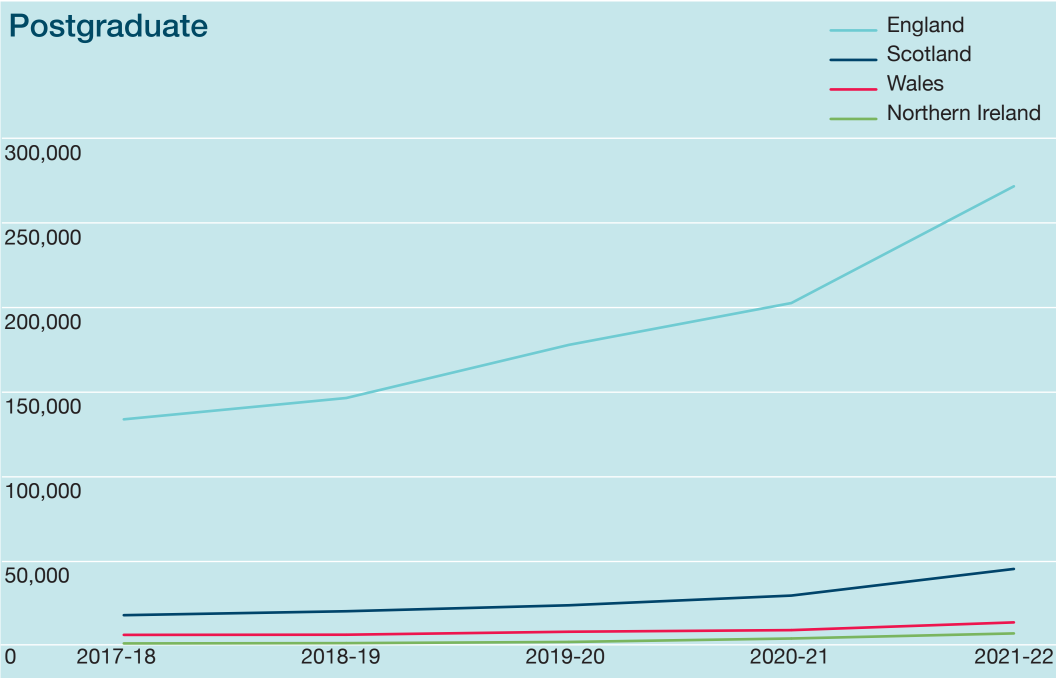

Ulster University has a high number of international students studying in Northern Ireland, with 12,045 – around a third of their student population – coming from overseas.

Cardiff University has the highest number of international students in Wales. 7,530 studied there in 2021-22

The University of Glasgow also experienced a rapid increase in international students from 13,245 to 17,390. This can be attributed to an increase in RoW students from 10,905 to 14,795. Due to this increase, the University of Glasgow has moved from being the sixth to the fourth most popular destination for international students to study at.

## Non-EU RoW student enrolment in each nation




Sources: TDT051 Table 11, HESA Student enrolments by domicile and region of HE provider

The number of first-year international students studying in the UK increased by 16% in 2021-22. Although England saw the highest rise in the number of students for postgraduate studies, all nations experienced an increase. Scotland and Wales in particular had increases of 53% and 48% RoW postgraduate students, the highest percentage increases for a decade.

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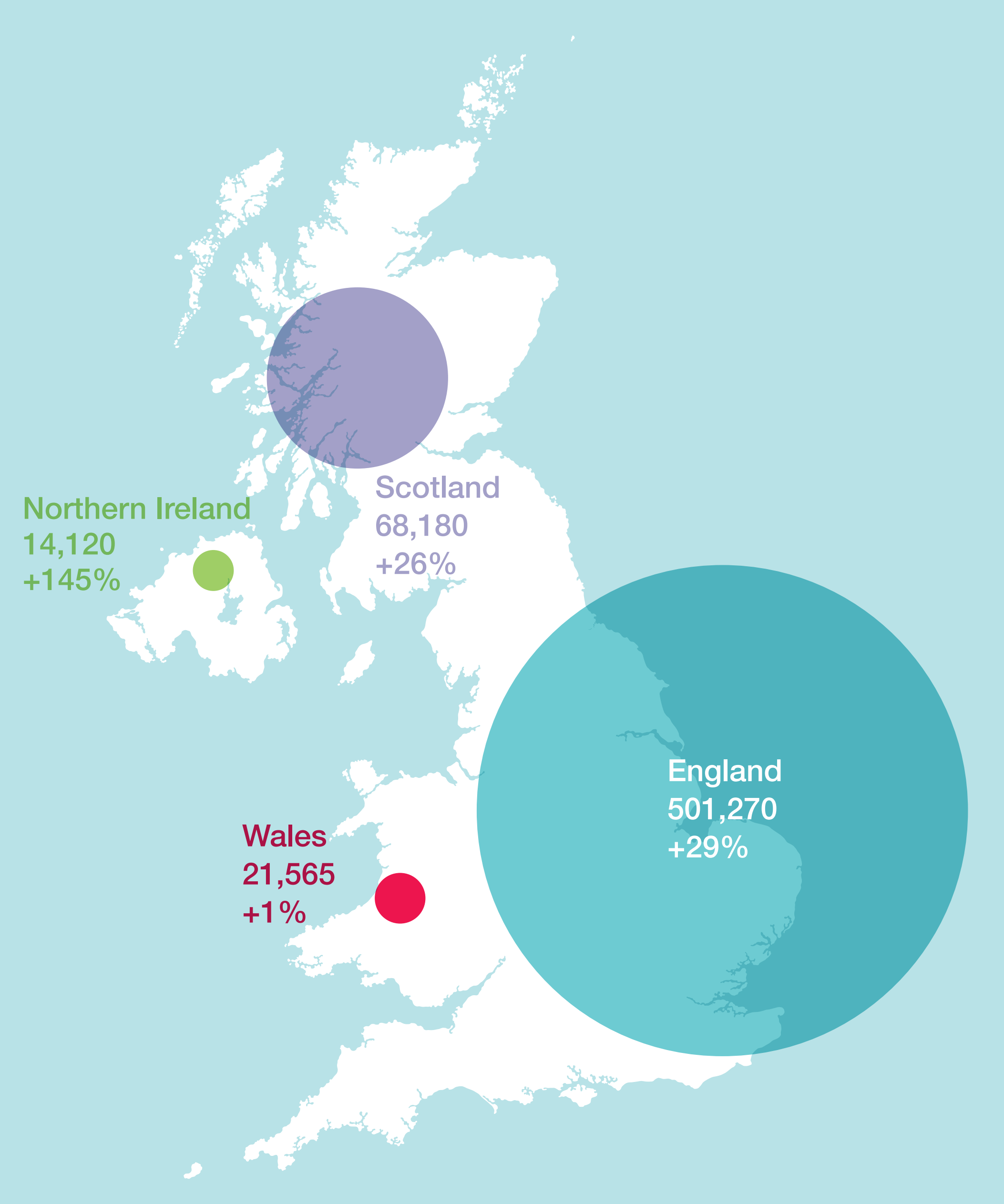
## International students per nation




Sources: Calculations from HESA HE student data: where do HE students come from? Table 11

All growth can be attributed to the spike in postgraduate students in these nations. Except for Northern Ireland, where undergraduate students increased by 340 places and EU students increased by 15 students, all nations suffered a loss in both undergraduate students and EU students.

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## What do international students study?

### Most popular subjects in 2021-22

| International students in the UK | Business and management 217,610 (up 22%) | Engineering and technology 67,870 (up 7%) | Computing 56,855 (up 22%) | Social sciences 54,815 (up 6%) |
|---|---|---|---|---|
| Undergraduate | 80,275 | 31,730 | 20,870 | 26,675 |
| Postgraduate | 137,335 | 36,140 | 35,985 | 28,145 |
| First-year intake | 28% increase | 9% increase | 22% increase | 6% increase |

### The subjects that saw the greatest rise in demand:

- combined and general studies* with a 46% increase
- agriculture, food and related studies with a 32% increase

### The only subjects to experience a drop in demand:

- languages and area studies, with a 4% decrease
- historical, philosophical and religious studies, with a 0.7% decrease

*HESA What do HE students study? Table 52 (CAH level 1)*

| The most popular postgraduate subject for part-time international students | The most popular undergraduate subject for part-time international students |
|---|---|
| Management studies with 2,810 students | Nursing (non-specific) with 5,494 students |

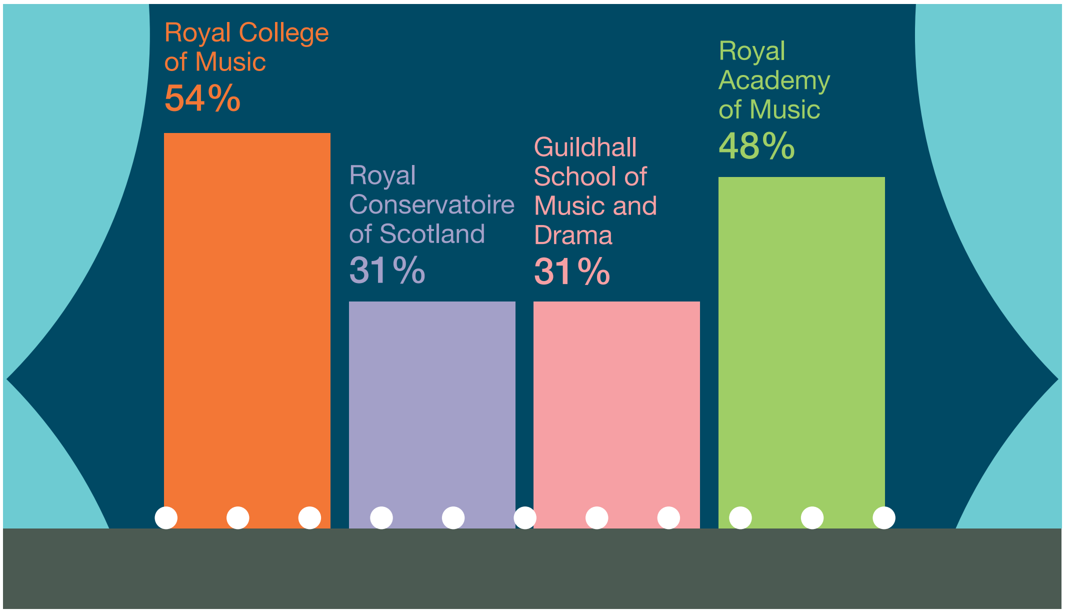
*HESA What do HE students study? Table 52 (CAH level 3)*

Since the previous year, there has been a significant increase across the board of subjects studied. The top five most popular subjects (social sciences, and design and creative and performing arts ranking fourth and fifth) have retained their position as such, although computing has overtaken social science subjects as the third most popular. Design and creative and performing arts are likely to continue dropping in numbers, as the number of first-year students has been decreasing year on year since 2019-20.

**combined and general studies is detailed by HESA as courses where students do not specify a subject specialism.*

## Performing arts

The UK, especially London, draws in talent to creative institutions, big or small. The Royal College of Music ranks as number one in the 2022 QS performing arts rankings, and the UK has a total of four institutions in the top 10, three of which are in London:




*HESA: Where do HE students study? Table 1*

The Royal College of Music and Royal Conservatoire of Scotland have almost double the number of RoW students than students from EU. Five years ago, international students at the Royal Conservatoire of Scotland were a lot more evenly split between the two groups.

In the 2022 International Education Strategy for London, London Higher looked into the fall in EU student applicants to UK conservatoires. Applicant numbers in the January 2022 UCAS cycle were less than half of what they had been by the same deadline in 2019 (1,240). January 2023 numbers rose by 5%. This is due to the damage of Central and Eastern European student recruitment, an area of Europe where lots of artistic talent traditionally comes from, caused by the introduction of international student fees to EU students.

Although efforts are being made by institutions to retain these EU students through the provision of funds to offset course fees (International Education Strategy for London, pp. 29-30), the UK higher education recruitment pool is diversifying. The strategy recommends that creative arts institutions must consider the accessibility of their application procedure and ensure that there are hub locations for target market areas to allow a broader range of students to apply.

### Global engagement in the UK college sector – Academic year 2021-22, Association of Colleges

The Association of Colleges (AoC) published its fifth annual report on the international activities that UK colleges undertook in the 2021-22 academic year. It looks at key facts and figures of income and student numbers, international partnerships and provision, and global developments.

Key findings (based on college respondents):

- Further education institutions represent only 3% of sponsored UK study visa applications.
- The average college income from international student activity totals £614,000.
- The most popular international activity is student mobility through the Turing Scheme or the legacy of Erasmus+ funding (68%), with international student recruitment coming second (numbers have decreased since Brexit).
- 61% of respondents hold a license to sponsor international students, but 87% issue fewer than 50 confirmations of acceptance for studies (CAS) per year in an effort to “minimise risk and maximise compliance”. The main obstacles to engagement of international activities are staff capacity, funding and student sponsor license regulations.
- Colleges struggle to recruit international students for levels 4 and 5 courses due to the restrictive nature of the visa (a two-year limit on pre-degree study and requirement of 15 hours of classroom-based study per week).

3

# Immigration statistics

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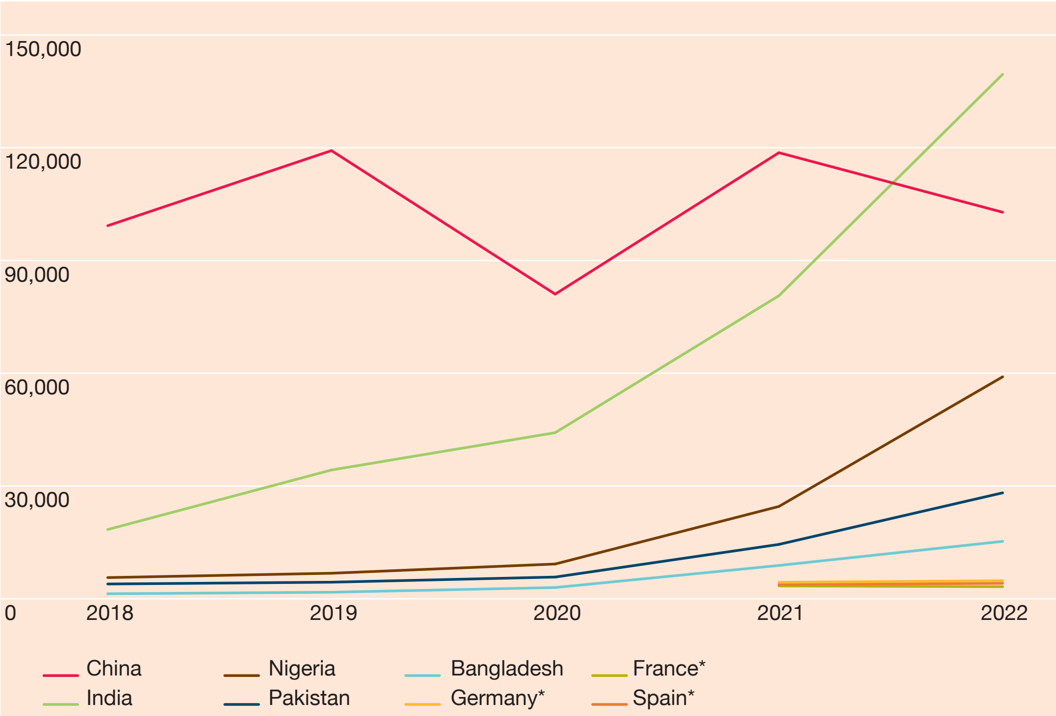
## Visa numbers

| Year | Student visas awarded |
|---|---|
| 2018 | 227,995 |
| 2019 | 268,674 |
| 2020 | 209,827 |
| 2021 | 375,999 |
| 2022 | 485,758 |

GOV.UK Entry clearance visa applications and outcomes – Vis D02, looking at year end December Q1-4

Since the fall in sponsored student visas in 2020, numbers have recovered and grown, and 2021 saw a 79% increase, especially in the third quarter, which doubled from the year before. In 2022, this again increased by 21%.




How many people continue their stay in the UK or apply to stay permanently? - GOV.UK

Chinese students accounted for almost half of the international student population in the UK pre-pandemic, totalling 119,231 in 2,668,674 visas issued. Since the pandemic, they have recovered in numbers and are at around the same level as before. The lack of growth is possibly a reflection of the continued Covid-19 restrictions in the country.

Due to policy shifts and university drives to diversify recruitment, there have been increases in certain markets. Indian and Nigerian student

*Data only exist for EU country-sponsored student visas post-2020, as these students experienced freedom of movement under EU law.

visas granted have been rapidly increasing. In 2013, Indian students comprised 8% of the sponsored study visas granted; by 2022, they totalled 29%. Nigeria has increased six-fold.

In 2022, Chinese and Indian nationals comprised over half of all sponsored study visas. Pakistan and Bangladesh also showed three times the number of student visa holders in 2019.

The top three sending countries in EU are Germany, France and Spain. These three nationalities accounted for half of all EEA and Swiss grants to study (excluding Irish) in the year ending December 2022.

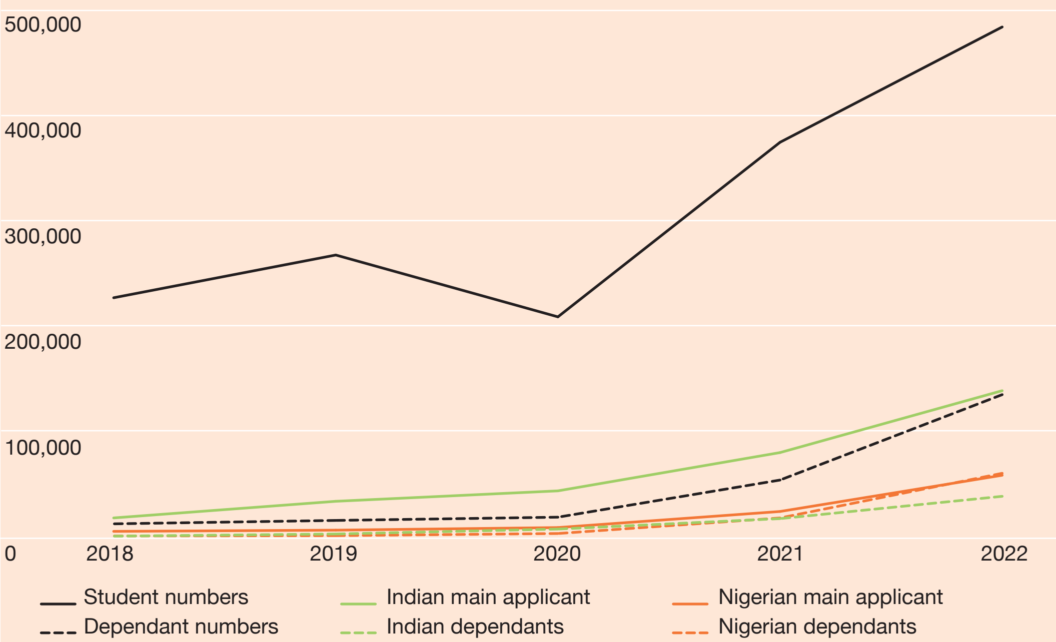
With the recently introduced Graduate route, students are able to apply to stay in the UK after they graduate to look for work. 59,937 Graduate route extensions were awarded in the year ending September 2022. Over two fifths (43%) awarded this visa were Indian nationals.

## Dependants on sponsored study visas

International student recruitment markets are diversifying: an achievement of the UK Government International Education Strategy 2019. The demographic of international students is also diversifying, with older students arriving in the UK with their families.

Although there is an increase in the numbers of dependants arriving in the UK, it is important to note that this growth is in line with the growing numbers of students.

### Dependant visas issued




GOV.UK Entry clearance visa applications and outcomes – Vis D02

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2022 saw the highest number of dependants of sponsored study visa holders, with Nigerian nationals being the dominant source. Visas issued for the top five nationalities for sponsored study dependants (Nigeria, India, Pakistan, Bangladesh and Sri Lanka) totalled 119,943 for the year ending December 2022; the student visas themselves totalled 247,817.

Apart from the 2020 visa issuances drop during the pandemic, students on a student visa have been steadily increasing since 2016, when there were 194,531. The International Education Strategy set out India and Nigeria as potential growth regions for the UK education sector and set a target of 600,000 international students in the UK by 2030. The sector continues to surpass this target in 2022, and the majority of growth comes from the above countries targeted as potential growth.

4

# Academic experience

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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.

HEPI/Advance HE also collects academic experience data from undergraduate students in their annual Student Academic Experience Survey (SAES). It reflects full-time undergraduates' opinions on their time in higher education and their attitudes towards relevant policy issues.

HESA ceased collecting and publishing non-continuation rate data of entry cohorts from May 2021.

## International students' satisfaction with their academic course, National Student Survey (NSS) 2022, Office for Students

The majority of statements show a recovery of positive attitudes towards the students' experiences since 2021, which represents a recovery from the 2020 and 2021 declines suffered during the Covid-19 pandemic. There are, however, significant variations of satisfaction across institutions and regions.

London students were shown to be the most likely out of all English regions to say that their experience had exceeded their expectations, and the most likely (joint with students in the North West) to choose the same course and institutions again.[5]



5 Living-and-Learning-in-London-What-the-HEPI-Advance-HE-Student-Academic-Experience-Survey-tells-us-about-life-in-the-capital.pdf

Question 27 of the National Student Satisfaction Survey posed the question: “Overall, I am satisfied with the quality of the course”.

| Region of domicile | Agreement rate (2019) | Agreement rate (2020) | Agreement rate (2021) | Agreement rate (2022) |
|---|---|---|---|---|
| EU (excluding UK) | 81.26% | 80.33% | 75.15% | 77.04% |
| RoW | 84.05% | 83.74% | 77.74% | 80.06% |
| UK | 83.76% | 82.68% | 75.20% | 75.80% |

*Data sources: 2019, 2020, 2021 and 2022 NSS results - Analyst: Office for Students, Information for Students Team*
*Response to FOI request.*

While there is only a marginal increase in the overall satisfaction of UK students, there is a more notable increase among international students. This is despite international students paying higher fees, which would often draw the assumption that they would have higher expectations than domestic students.

The biggest increase in positive responses was to Q20: “I have been able to access course-specific resources (e.g. equipment, facilities, software, collections) when I need to.” This is indicative of the development and adoption of a more digitally focused pedagogy during the pandemic, and institutions working to retain some of these digitalised resources to enhance learning.

## Student academic experience survey 2022, HEPI/AdvanceHE

The annual Student Academic Experience Survey reflects the responses of over 10,000 undergraduate students studying in the UK in February 2022, as pandemic restrictions were easing. Of this sample, 16% were international students, an increase in representation from the year before of 11%. International students in the UK make up 15% of the overall undergraduate student population (HESA 2021/22).

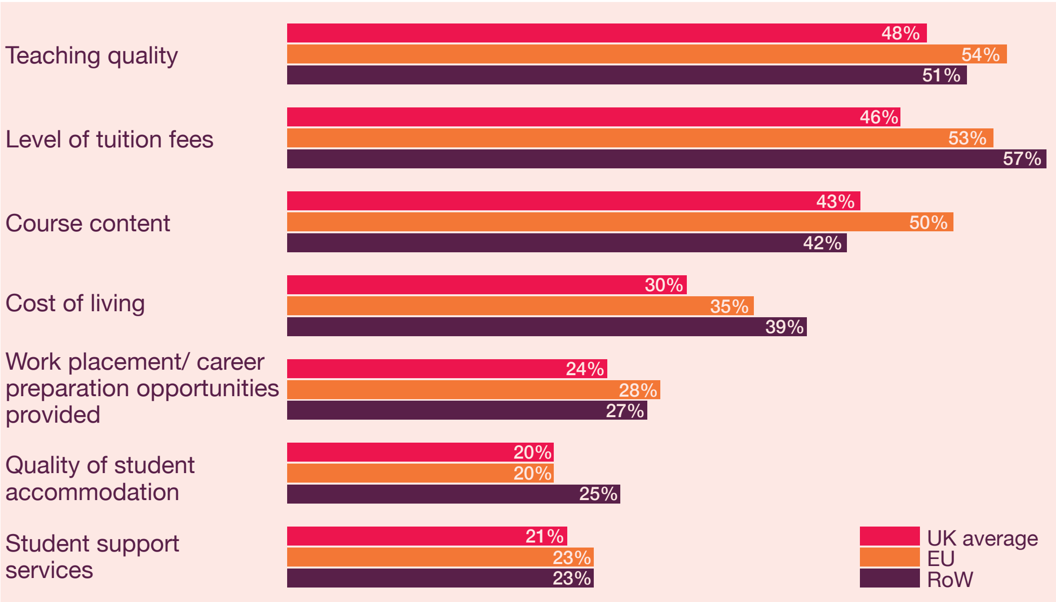
## Value for money

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 | Northern Ireland |
|---|---|---|---|---|---|---|
| 2019 | 63% | 47% | 44% | 37% | 39% | 38% |
| 2020 | 57% | 41% | 46% | 43% | 37% | 37% |
| 2021 | 50% | 29% | 30% | 33% | 24% | 27% |
| 2022 | 48% | 40% | 36% | 36% | 34% | 28% |

As face-to-face lectures and seminars increased in 2020-21, perceptions of value for money rose less in EU and RoW students than in those from England and Wales, showing a similar level of perceptions across the four groups. EU perceptions of value for money have always been higher than English perceptions. This is linked to student satisfaction with their lives overall, and international students are more likely than domestic students to be very satisfied with their lives and slightly less likely to be unsatisfied.

Scotland has continued to show a decrease in perceived value for money, and Northern Ireland's experience represents the lowest value at 28%. This is likely to be partially due to the impact of each nation implementing and easing measures in their own time and more restrictive pandemic regulations being in place at the time of the survey.




Source: Question 16b of the student academic experience survey 2022: Factors the students were thinking about when rating the value of their education, Table 78, Multiwave data

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When considering the reasons for ‘poor’ or ‘very poor value’ responses for EU and RoW students, and the comparison from 2021 to 2022:

- The cost of tuition fees for their course was the dominant reason listed (60% and 67% respectively, increasing from 51% to 58%).
- The cost of living featured in that it affected perceptions of ‘poor’ or ‘very poor value’ (39% and 37%, from 34% and 38%, UK average 34% from 30%), aligning with ongoing sector concerns.[6]

### Finances and the future

| | UK 2022 | EU 2022 | RoW 2022 |
|---|---|---|---|
| Maintenance loan | 62% | 13% | 10% |
| Scholarship | 5% | 6% | 13% |
| Family support | 23% | 65% | 72% |
| Employment income | 9% | 14% | 5% |
| Other | 1% | 2% | 0% |

*Question: “Are your living costs mostly covered by:” Table 81 from SAES 2022 Weighted Singlewave Tables* 2022 Student Academic Experience Survey - HEPI

- International students mostly rely on funding from their family to support their living costs when studying in the UK, twice as much as the average domestic student studying in the UK.
- EU students rely more heavily on family support and income from employment, possibly due to their inability to live with family during term time and the higher flexibility of working hours if they have settled or pre-settled status under the EU Settlement Scheme.
- International students rely less on a maintenance loan than their counterpart domestic UK students, with EU students receiving 13%. Although this percentage has not altered since 2020-21[7], it may start to decrease in years to come as a result of immigration and policy changes due to Brexit, resulting in EU nationals generally no longer being eligible for maintenance loans from the UK nations.

The report recommends that careers services support students to find “meaningful and manageable” part-time work during their studies. This would alleviate their concerns about maintenance costs (shown to be of higher concern than the costs of tuition, 52% and 23% respectively),



6 Q: “When giving your answer to the previous question on value for money, were you thinking primarily about:” (those who selected poor/very poor for their view of the value for money of their present course, Table 79

7 2021 Student Academic Experience Survey p. 54

while allowing an exploration of alternative career paths. This support will become increasingly important with the increasing cost of living experienced so far during the 2022-23 academic year.

## Postgraduate taught experience survey 2022, AdvanceHE

In the overall postgraduate taught student experience, areas of the experience that fell during the pandemic are slowly recovering. This is mostly tied to access of resources, with EU students voicing higher concerns than their RoW counterparts since 2016. In 2022, EU student satisfaction stood at 79%, while students from Asia and Africa experienced an 86% satisfaction rate.

Loneliness was a major focus in this report. Students found that distance learning contributed to feelings of loneliness, due to the lack of contact and environment in which to naturally form connections with peers. Students who received in-person teaching experienced loneliness to a lesser extent.

The report notes that, despite the sector finding a correlation between expanding the postgraduate taught provision and declining the quality of the student experience, data collected by Advance HE show that it is not a simple causal relationship. Increased student recruitment is not a concern in itself; it is when there are not adequate resources to meet the needs of the students.

## Postgraduate research experience survey 2022, AdvanceHE

International students have higher satisfaction rates in 2022 compared to UK-domiciled students for whom satisfaction for their course has fallen. The divergence in opinion is due to international student opinions recovering to pre-pandemic levels, while UK student opinions remained low.

There were large gaps in: perception of value an institution places on feedback from research students, the quality of the academic experience, and preparedness for future careers.

## Working in partnership to improve international student integration and experience, LSE Consulting

This report looks at six factors that are key to improving integration, comparing efforts made by institutions both before and during the Covid-19 pandemic. Evidence was gathered by Office for Students and LSE Consulting from students and alumni.

By investigating these areas, the report gives the sector recent qualitative and quantitative data on these areas of international student life. The evidence provided allows practitioners and institutions to identify and produce evidence for areas in which they may be requesting more support.

The six areas of support, in order of priority, are:

- **Immigration –** and the need for sufficient staffing in visa processing and support.
- **Affordable accommodation –** with legal and logistical support to secure housing, as well as good pastoral care.
- **Personal finances –** where planned budgets and monetary affordability are susceptible to change (global crisis, increased cost of living, etc).
- **Social life and mental health –** which are inextricably connected and require efforts to encourage diverse regular student mixing and intercultural awareness workshops that are key to integrating student groups.
- **Academic challenges –** that mostly relate to adapting to the English higher education system and a desire for increased institution-led over student-led support.
- **Employment –** the most important after immigration advice in support services and crucial to students gaining an understanding in how the job market operates, navigating obstacles faced and administrative visa issues.

There is a list of findings and policy recommendations at the end of the report for further guidance, which focus on:

- Integrating a more ‘bottom-up’ approach to the delivery of international student services and initiatives through the integration of students’ unions, student societies and engagement of home students.

- Strengthening and adapting the governance framework on harassment and sexual misconduct to take into account cultural differences of international students.
- Avoiding thinking of international students as a homogenous group and instead building an understanding of their diverse needs and concerns into services, programmes and the overall changing landscape of higher education.

5

# Graduate data (nation breakdowns)

UK Council for International Student Affairs

UKCISA

Since the Graduate route was introduced in July 2021, there have been increasing numbers of international students choosing the UK as their place of study, indicating graduate opportunities as a primary factor in their decision. The Graduate route allows international students to stay in the UK for two years (three years for doctoral students). As there is no sponsorship requirement, this allows time to secure a job and flexibility to switch companies.

However, there is a lack of data on international graduates – their career path, the length of time it takes them to secure a job, and general clarity on the motivations behind students choosing the Graduate route over other visa types or alternative countries.

Filling this gap in data is paramount in understanding student needs and motivations for institutions to best support their students, and in the UK remaining as one of the top destination countries for international students in a competitive market.

## Graduate outcomes 2019-20, HESA

The Graduate outcomes annual survey captures graduates' activities approximately 15 months after completing their studies. It provides a wide range of data on life after graduation, including domicile and industry of work (within the UK and overseas) and reflections on their degree and career.

As HESA has ceased the international calling of graduates to gather data, the quality of data due to the range and numbers of those surveyed has decreased compared to previous years.

| | EU | RoW | UK |
|---|---|---|---|
| Full-time employment | 28% | 19% | 33% |
| Part-time employment | 4% | 2% | 7% |
| Full-time further study | 8% | 4% | 4% |
| Unemployed | 3.1% | 2.6% | 2.3% |
| Unemployed and due to start further study | 0.2% | 0.2% | 0.02% |
| Unemployed and due to start work | 0.6% | 0.4% | 0.3% |

HESA Graduate Outcomes 2019-20: Summary Statistics – Graduate activities and characteristics, What were the activities of graduates? Figure 4

In the table above, it is clear that RoW graduates in the 2019-20 cohort are less likely to be employed than EU or UK graduates. This could be due to a number of factors, such as visa barriers (including sponsorship) in the UK or a lack of understanding of the UK (or global) labour market.

Graduates were also given the statements: “My current activity fits with my future plans”, and “I am utilising what I learnt during my studies in my current activity”. To both statements, more international graduates responded with ‘agree’ or ‘strongly agree’ than UK graduates.

## ‘Not heard of this’: employers’ perceptions of the UK’s Graduate route visa, HEPI and Kaplan

To better understand the motives of employers and needs of the students when securing employment and the barriers faced, HEPI conducted a study with Kaplan and the Institution of Directors (IoD). The study engaged only 32,000 UK organisations out of 1.4 million employers able to sponsor, but it provides a welcome insight into those businesses that are part of the IoD.

Findings were as follows:

- 27% of employers were unfamiliar with the Graduate route visa, and 28% had never sponsored a visa for an employee and had no intention of doing so. Reasons for this was mostly related to heavy bureaucracy and high expense (processing cost, time and legal fees).
- 60% of the employers who had not previously sponsored an employee believed that they could find the skills needed outside the visa system. Although they are aware of the benefits that international graduates can bring, the perceived return on investment is not enough.
- There was a significant lack of understanding about the Graduate route. However, once aware, 42% of respondents stated that they would consider using it.

The Institute of Student Employers (ISE) shared consultation results from their members for the report. The point was made that, due to the temporary nature of the route, it is not suitable for many jobs. This is clear when considering those graduate programmes in engineering at global firms that last over two years and would require sponsorship after two years.

The Graduate route is much more suited to smaller organisations that do not have the capacity for sponsorship, or to allow students the flexibility to try different roles and expand their work experience.

## International Graduate routes: narratives from the UK job market, AGCAS

To gather data on the successes and failures of the Graduate route and humanise the graduate experience, the Associate of Graduate Careers Advisory Services (AGCAS) committed to gathering data from over 1,000 international graduates in June 2022. The respondents shared their experiences of gaining post-study employment in the UK, and there were added contributions from focus groups in November 2022 that provided an update of the experiences from many who responded to the original survey.

Key findings:

- 85% had a Graduate route visa; the remaining 15% were on a Skilled Worker visa.
- 72% on the Graduate route were in a graduate-level role (SOC codes 1-3).
- 60% were in full-time employment.
- 58% believed that post-study work expectations were being met and the Graduate route was valuable due to the number of opportunities available in any sector of interest, regardless of employer size.
- The Skilled Worker visa facilitated recruitment into global organisations and technical roles, or graduate programmes/traineeships, whereas the Graduate route was broadly used across many sectors and industries, including smaller organisations and charities.

Students found the Graduate route beneficial but costly (paying £715 plus the immigration health surcharge up front) compared to the Skilled Worker visa, the cost of which was often covered by the employer. There is also a major lack of employer knowledge and resistance to employing individuals who require a visa.

Despite these barriers, employers unable to sponsor workers are likely to utilise the Graduate route to diversify their workforce. Careers services, when used, were also found to greatly support students in developing their skills, confidence and understanding of the UK labour market and visa routes.

### Recommendations

To facilitate the development and success of the Graduate route for international graduates and the UK workforce, a number of recommendations were listed for policymakers, employers, universities, and careers and employability services:

- There should be clearer signposting of the careers services and development of services offered to international students and graduates.
- Institutions should ensure that employers collaborate with them and are aware of various resources, such as the International Student Employability Group's employer guide on recruiting international talent.
- The immigration skills charge should be removed for employers switching an employee from the Graduate route to the Skilled Worker route.
- There should be a collective effort of collaboration both within the institution and across the sector to improve the international student experience and contribute to the UK economy.

6

# Public perceptions of international students

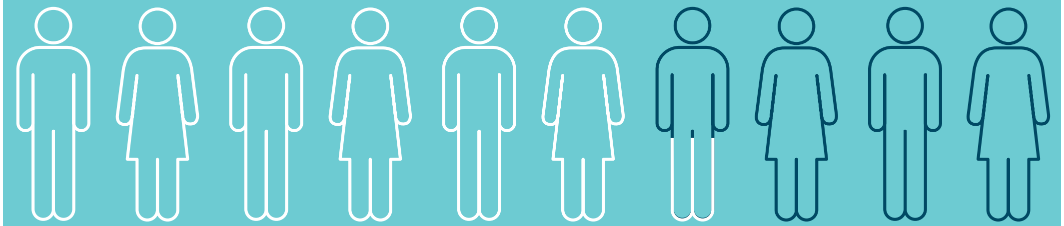
UK Council for International Student Affairs

UKCISA

## Public First Polling for Universities UK (UUK)

New polling by Public First and UUK looked at the general public's perceptions of international students in the UK.

**64%** of UK public want international student numbers to remain unrestricted



- 67% believe that all students who meet visa requirements should be able to come to the UK for study, regardless of the university applied to.
- 62% recognise that international students give more to the economy than they take out.
- 43% think that British diplomacy benefits from hosting international students, who leave with positive impressions of the UK after studying here.

A large majority believed that limiting legal migration should not be a current focus of the UK Government and were more concerned with challenges such as the cost of living and NHS waiting times for procedures, ambulances, accident and emergency departments and general practitioners (GPs).

# 7

# Mental health

UK Council
for International
Student Affairs
UKCISA

## Understanding mental health inequalities: international students

The Student Minds study into international students' mental health inequalities provides a closer look into the needs and wellbeing of international students from a mental health perspective. It explores the different challenges they face when studying in the UK, including cultural and linguistic barriers and the impact of global events, and assesses how students may be further supported.

Key findings show that international students believe that:

- Their mental health and wellbeing are less of an issue than for domestic students, but when looking at specific challenges faced (eg making friends, employment), their concern was often higher than that of domestic students, believed to be due to the differing cultural understanding of the term 'mental health'.
- They struggle to make and retain friendships due to perceived "normal (or even essential) aspects of UK student life" – drinking alcohol and going to nightclubs. Domestic students questioned seemed unaware of the struggles that international students face in this respect and are often ignorant of the differing backgrounds and cultures of their international peers.
- Staff and students' unions are often "ignorant" of global events that affect students, or their knowledge only extends to issues in Europe.
- They need a higher level of support to manage their wellbeing (48%) than domestic students (41%), despite the lower proportion of international students who access services (18% international students to 26% domestic) and the higher number of students with mental health issue(s) not planning to disclose them to their institution (62% international students to 52% domestic).
- They struggle with the cultural difference in openness to mental health, often feeling more isolated and confused about where to go for support.

8

# Accommodation and the cost of living crisis

UK Council for International Student Affairs

UKCISA

There have been a number of discussions on accommodation and the cost of living in the past year, as well as petitions run by organisations like the National Union of Students (NUS). However, there is a lack of published reports on international students in the UK.

## Report of the inquiry into the impact of the cost of living crisis on students, All-Party Parliamentary Group for Students

In March 2023, the All-Party Parliamentary Group for Students published its report of the inquiry into the impact of the cost of living crisis on students. It delves into the student experience, hardship funding and long-term consequences for students in further and higher education. International students were noted when exploring the lack of clarity about securing hardship funds as an international student and the student visa cap on working hours.

Recommendations were made to the UK Government and universities on student hardship funding, improving processes for support, and improving knowledge of student employment needs and its impact on academic engagement.

## Learning with the lights off: students and the cost of living crisis, MillionPlus

MillionPlus (the Association of Modern Universities in the UK) surveyed 300,000 undergraduates for its report, looking at which students in its member institutions will be hardest hit financially in the 2022-23 academic year. Students from lower socioeconomic backgrounds, as well as black and mature students, may struggle more. There has been a rise in international students in the latter two categories following the Graduate route visa, ensuring the popularity of the UK as a study destination for more diverse groups of students.

It is worth noting that the report indicates that hardship funding is the most common response by MillionPlus universities to the cost of living crisis, and that measures have been put in place to support international students to access hardship funding.

MillionPlus calls for:

- Relevant bodies across the UK to expand the hardship funding allocations to increase the support available.
- Institutions and students' unions to make clear who can access financial assistance programmes and how to do so.

It also explores the close link between financial difficulties and mental health struggles for students, calling for sufficiently signposted mental health services, and working with local businesses and councils to alleviate the financial burden for students on campus.

## Student accommodation report 2022, Cushman & Wakefield

Cushman & Wakefield is a global commercial real estate services firm that releases a number of insight publications on demand, supply and investment trends in the UK. In July 2022, it published a report on student accommodation, sharing trends over the previous years and insights into their outlook for 2023 onwards. It also provides accommodation strategy and partnership advice to universities across the UK.

In 2021, visa issuances were up 81% from the year before, and it is predicted that in 2022-23 the average rental for students will rise by another 3.1%. 17,000 more beds are planned for 2022-23, but, with increasing building costs due to inflation, shortage of supply of materials and the current geopolitical climate, what will be built is not guaranteed to be affordable.

The increasing market diversity of international students coming from India and Nigeria has an impact on the suitability and capacity of housing in the UK. Cushman & Wakefield reports clear differences in overall affordability across different cohorts. The Chinese student population in the UK were often middle class and more flexible in their living arrangements. With increasing numbers of students coming from India, where the GDP per capita is only 18% of what it is in China, the report notes that it is even more important to ensure that students are not being priced out and that there is suitable accommodation both in capacity and affordability.

The average annual private sector rent outside London had reached £7,055.71 at the time of reporting. For university accommodation, the average annual price was £6,482.45. The rise in both private and university rents has outpaced the retail price index inflation, which at the time of reporting was 11.1%. Since then, in January 2023, it decreased to 8.8%.[8]

As demand for not only beds but suitable accommodation with non-standard requirements (eg facilities for families) grows, trends indicate a slower new supply of housing. 2021-22 only had 67 new developments



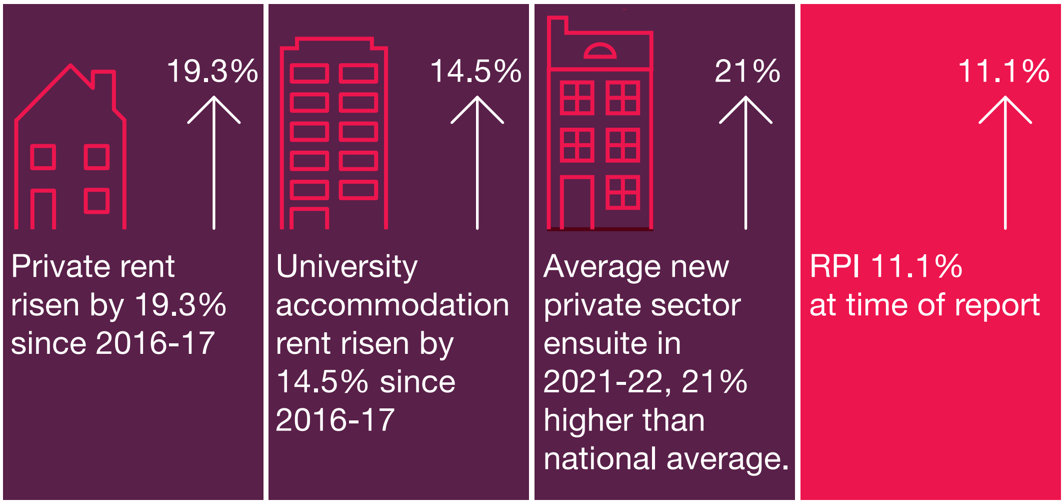
8 Release data 22 March 2023 for February 2023

in the market, less than half of what there were in 2017. Although some ongoing projects may have been delayed due to the pandemic, reduced materials and wider inflationary concerns, it is clear that the building of new accommodation is slowing down. Additionally, Cushman & Wakefield notes that there are a large number of university beds not being marketed due to concerns about utility prices.

| | | 2018 | 2019 | 2020 | 2021 | 2022 | 2023F* |
|---|---|---|---|---|---|---|---|
| Total UK | Schemes | 130 | 99 | 79 | 69 | 66 | 73 |
| | Beds | 32,988 | 32,744 | 24,799 | 23,145 | 17,546 | 16,384 |
| London | Schemes | 4 | 1 | 4 | 6 | 7 | 3 |
| | Beds | 1,302 | 497 | 1,815 | 3,106 | 3,002 | 765 |
| Provincial | Schemes | 84 | 62 | 52 | 40 | 34 | 40 |
| | Beds | 20,738 | 20,001 | 16,419 | 12,878 | 8,733 | 6,075 |

*2023 Forecast and actively marketed
*Source: FOI*

Rental in beds aimed at international students slowed the most in 2021-22. With the increasing numbers of international students in the UK, this is surprising only until one considers implications such as the growth in numbers coming from countries with lower GDP per capita and the increasing numbers of students with non-standard requirements.

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## Appendix of publications


Advance HE (November 2022) *Postgraduate research experience survey 2022*

Advance HE (November 2022) *Postgraduate taught experience survey 2022*

AGCAS (February 2023) *International Graduate routes: narratives from the UK job market*

All-Party Parliamentary Group for Students (March 2023) *Report of the inquiry into the impact of the cost of living crisis on students*

Association of Colleges (February 2023) *Global engagement in the UK college sector – Academic year 2021-22*

Cushman & Wakefield (July 2022) *Student accommodation report 2022*

Department for International Trade and Department for Education (March 2019, Updated February 2021) *International education strategy*

HEPI, Advance HE (June 2022) *Student academic experience survey 2022*

HEPI, Kaplan (January 2023) *'Not heard of this': employers' perceptions of the UK's Graduate route visa*

International Student Employability Group (May 2021) *Recruiting international graduates: a guide for employers*

London Higher (October 2022) *International Education Strategy for London*

London Higher, Advance HE and HEPI (March 2023) *Living and learning in London: What the HEPI/Advance HE student academic experience survey tells us about life in the capital*

LSE Consulting (January 2023) *Working in partnership to improve international student integration and experience*

MillionPlus (October 2022) *Learning with the lights off: students and the cost of living crisis*

Public First (March 2023) *Public first poll for UUK*

Quacquarelli Symonds (May 2022) *QS higher education briefing: Is Covid-19 still impacting student decision making?*

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

UCAS and College Board (May 2022) *Where next – What influences the choices international students make*

Universities UK International (November 2022) *International student recruitment from Europe: The road to recovery*


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UKCISA gratefully acknowledges the financial support it receives from:

Department for Education

Scottish Government
Riaghaltas na h-Alba
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