



Exporting Education UK

Student Survey Results

19 December 2012

Presentation by



by



Agenda

- Survey of International Students in the UK

- Survey of Chinese Students

Survey of International Students in the UK

Summary

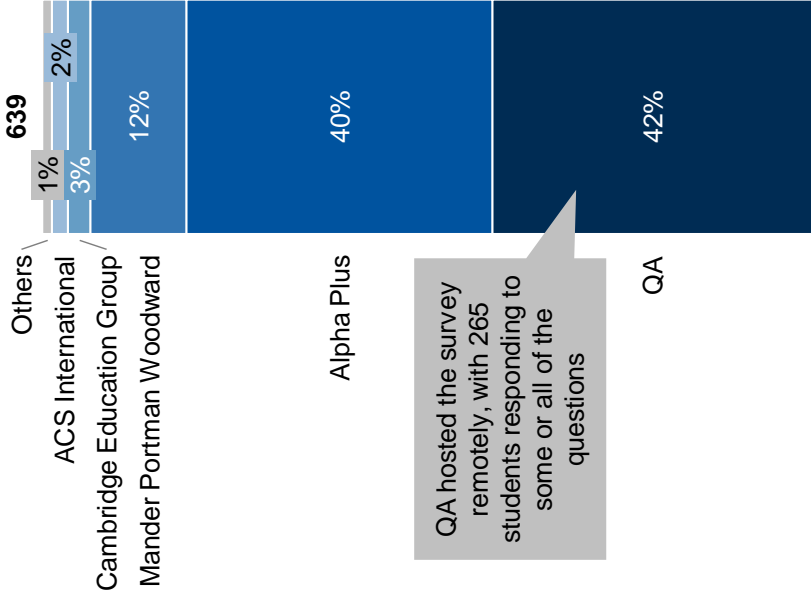
- The survey targeted international students studying at EdEx member institutions in the UK, including QA, Alpha Plus and Mander Portman Woodward. The vast majority of students were studying at the A Level or equivalent, undergraduate degree or postgraduate/ master degree level
- On average, international students spend c.40 weeks of the year in the UK
 - c.30 weeks of term time
 - c.10 weeks during holidays
- International students spend an average of £230 per week on accommodation and related expenses (utilities, etc.) totalling £9.4k per student per year
- Additional expenditure on food, entertainment, transportation, communication and other items comes to an average of £140 per week during term time and £136 per week during holidays
 - This leads to a total additional expenditure of £5.6k per student per year
- The weekly spend varies significantly by the student's country of origin, with students from Russia and South Korea spending over £550 per week, and students from Malaysia and the UK spending under £300 per week
- In addition to their personal expenditure, international students drive tourism through visiting friends and family, with an average of 3.3 visitors per student per year

We surveyed a total of 639 students, spread across 7 institutions over 18 countries and a range of levels of study

Breakdown of Respondents

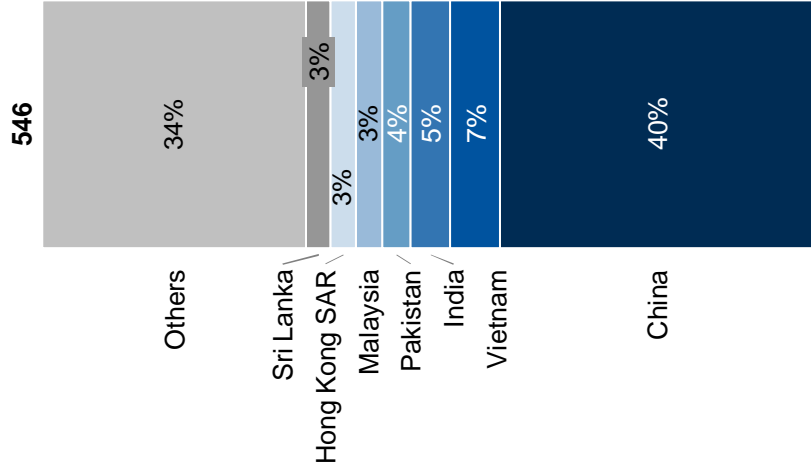
#, %

Breakdown by Institution

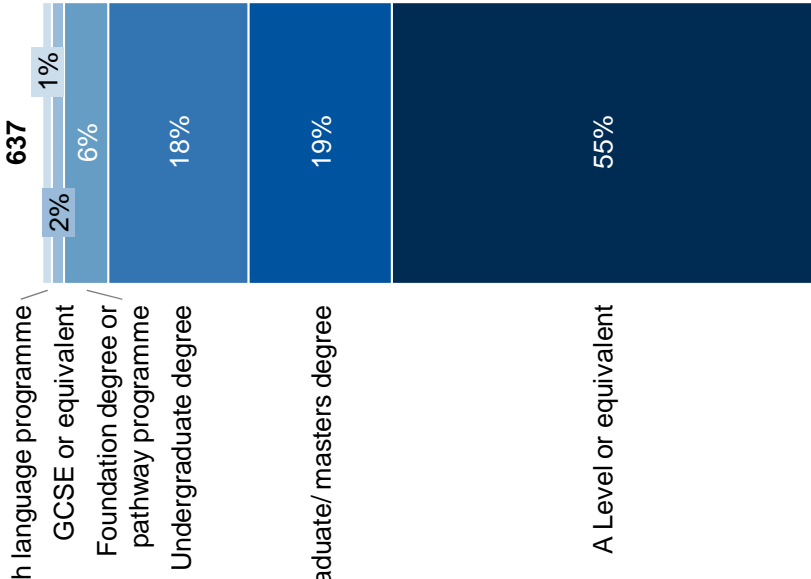


QA hosted the survey remotely, with 265 students responding to some or all of the questions

Breakdown by Country of Origin ¹



Breakdown by Level of Study ²

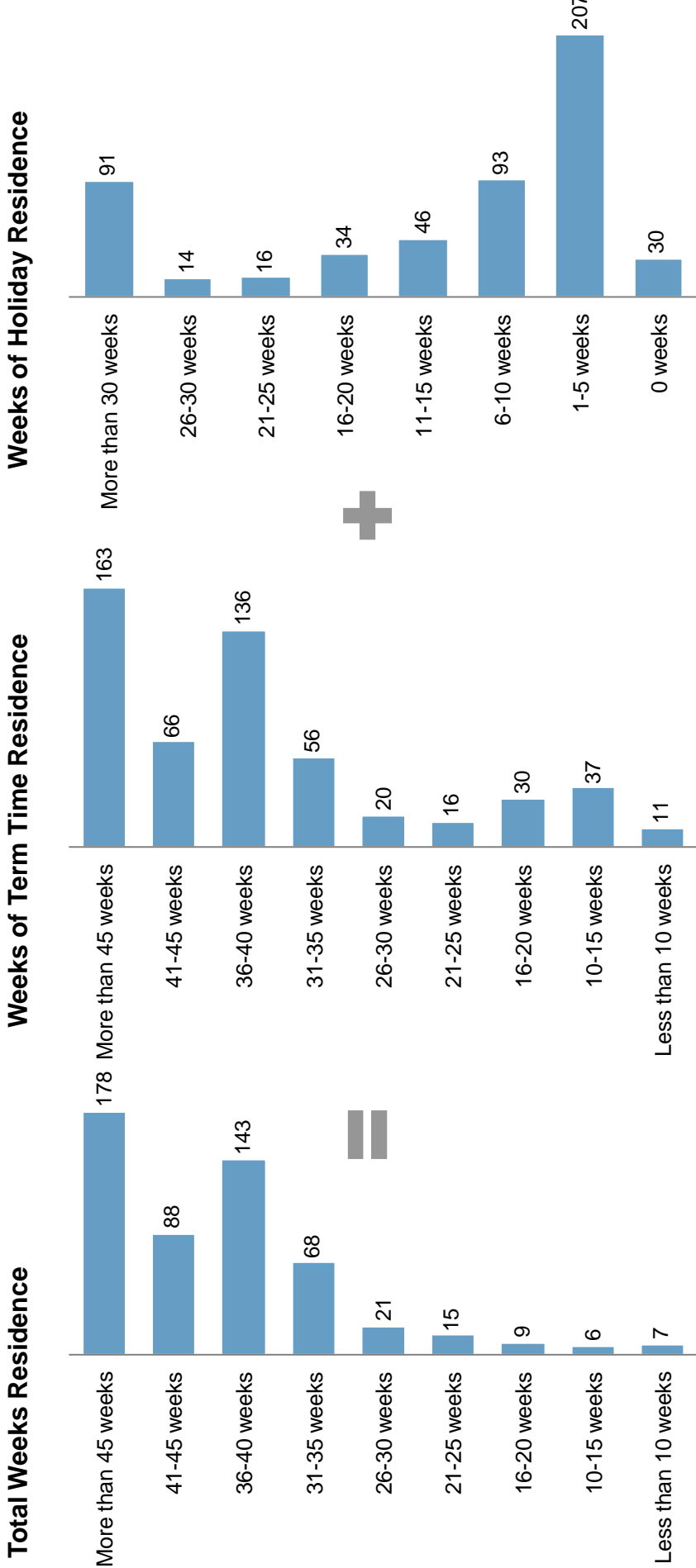


1. 93 respondents did not specify their country of origin
 2. 3 respondents did not specify their level of study

Source: *International Student Survey, OC&C analysis*

On average, international students spend c.40 weeks in the UK per academic year, split into 31 weeks during term time and 10 weeks during holidays

Number of Weeks of Residence in the UK per Academic Year¹
 #, n = 535²



Average Length of Stay

40.3 Weeks

30.6 Weeks

c.9.7 Weeks

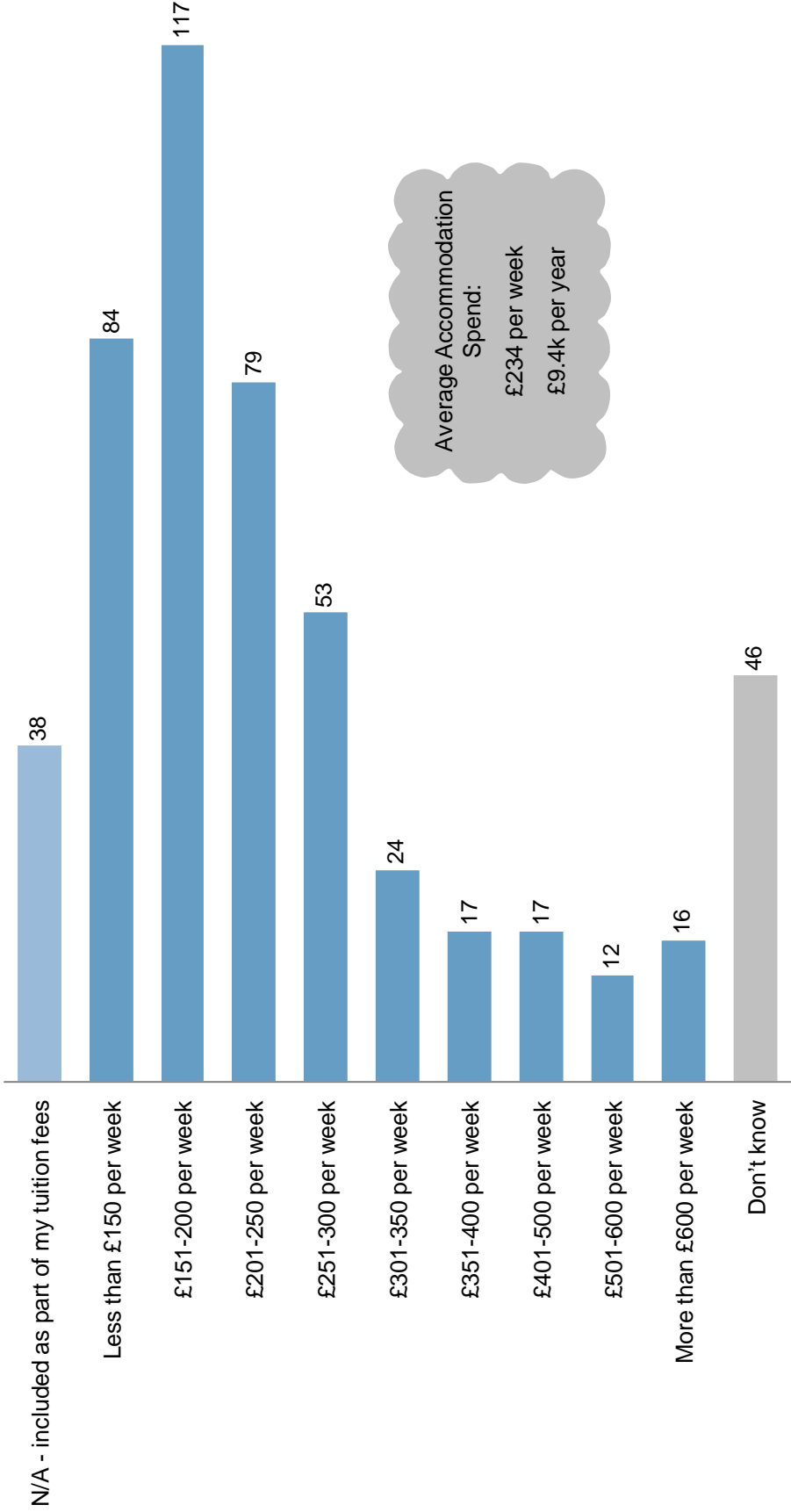


1. Question: How many weeks are you usually resident in the UK during the academic year? During term time? During holidays?
 2. N=535 as c.100 respondents skipped this question

Source: International Student Survey, OC&C analysis

During this time they spend an average of £230 per week on accommodation and utilities, totalling £9.4k of spend per student (over 40 weeks)

Weekly Accommodation Spend¹
#

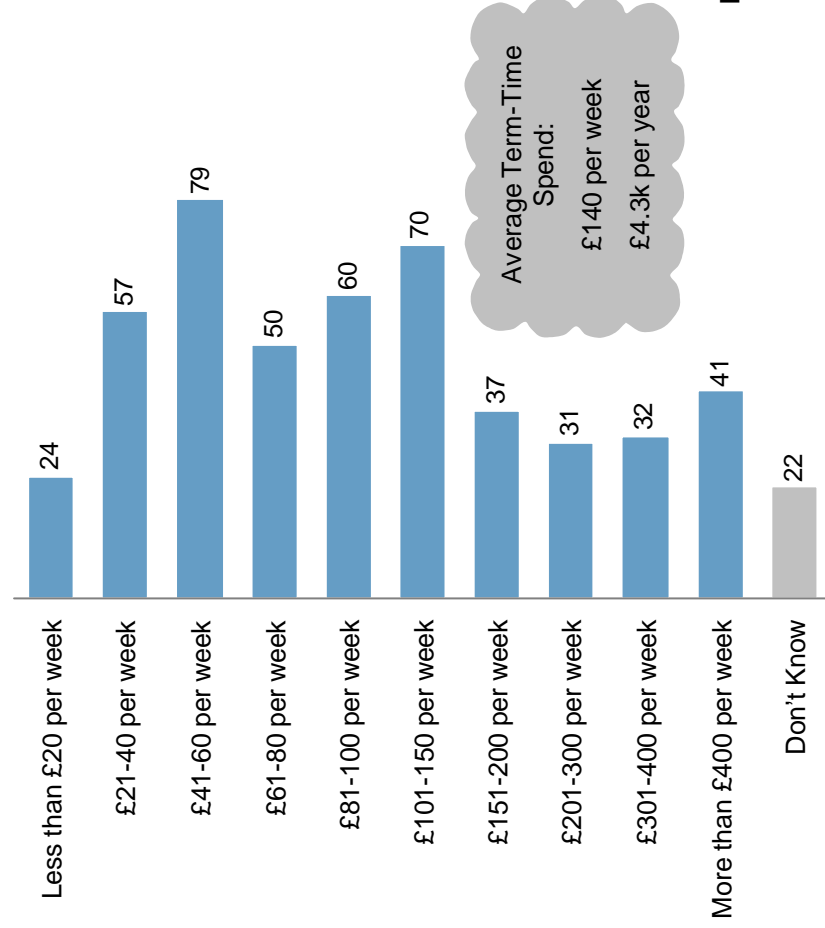


Additional expenditure of £140 per week during term time and £136 per week during holidays leads to a further £5.6k of spend per student

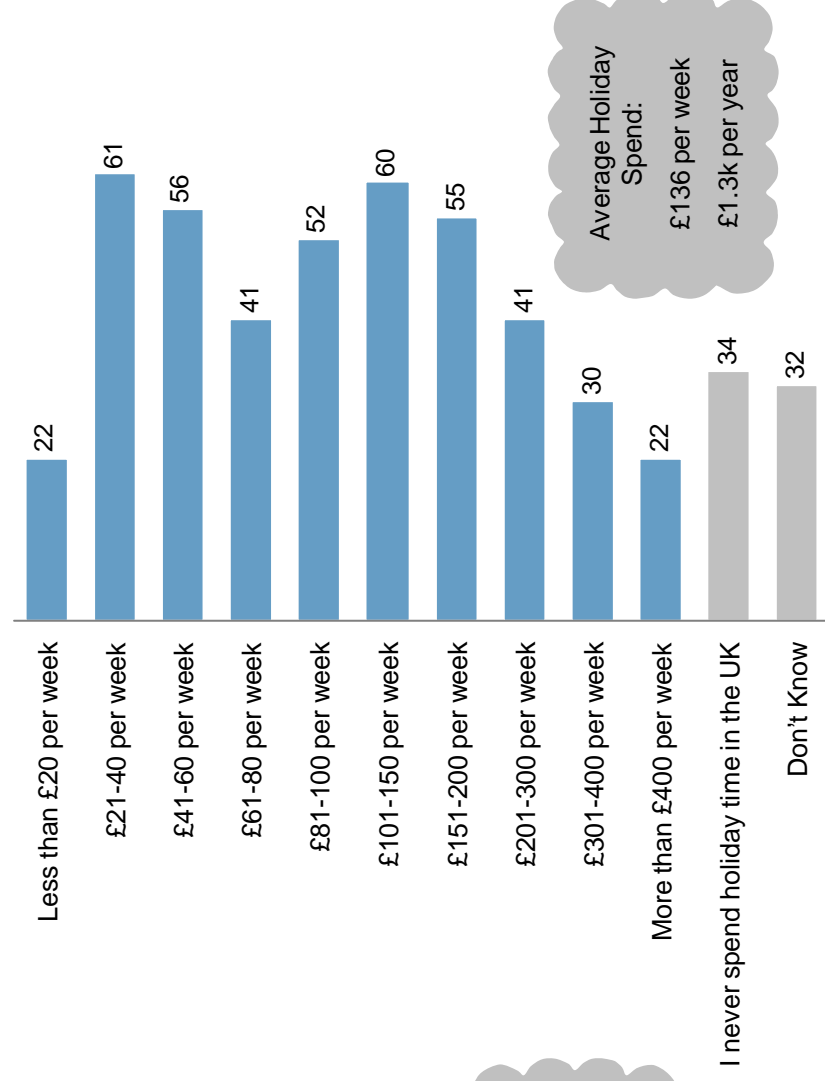
Weekly Non-Accommodation Spend

#

Weekly Term-Time Non-Accommodation Spend¹



Weekly Holiday Non-Accommodation Spend²



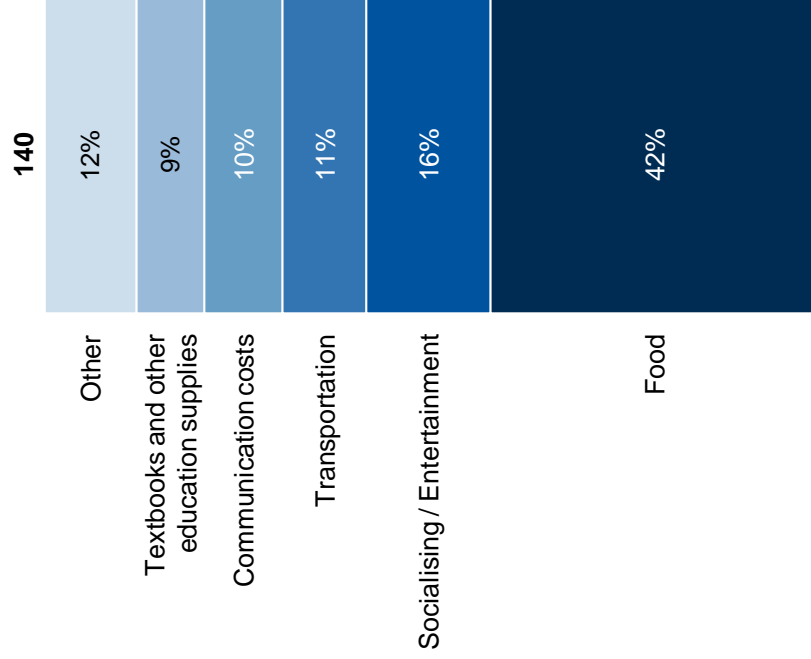
1. Question: Excluding tuition fees and other costs relating to your education that are paid directly to the institution, how much do you typically spend per week in term-time?
2. Question: Excluding tuition fees and other costs relating to your education that are paid directly to the institution, how much do you typically spend per week in holidays?

Source: *International Student Survey*, OC&C analysis

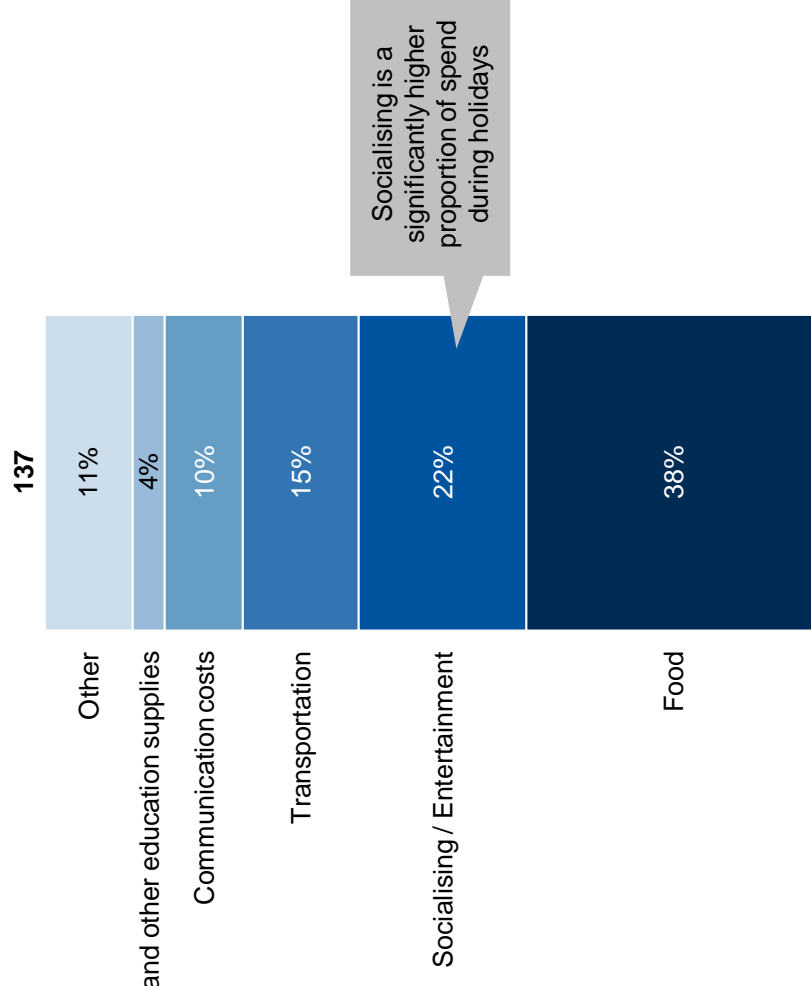
Backup: Breakdown of Other Spend

Breakdown of Non-Accommodation Spend by Category £ per Week, %

Breakdown of Term-Time Spend by Category¹



Breakdown of Holiday Spend by Category²

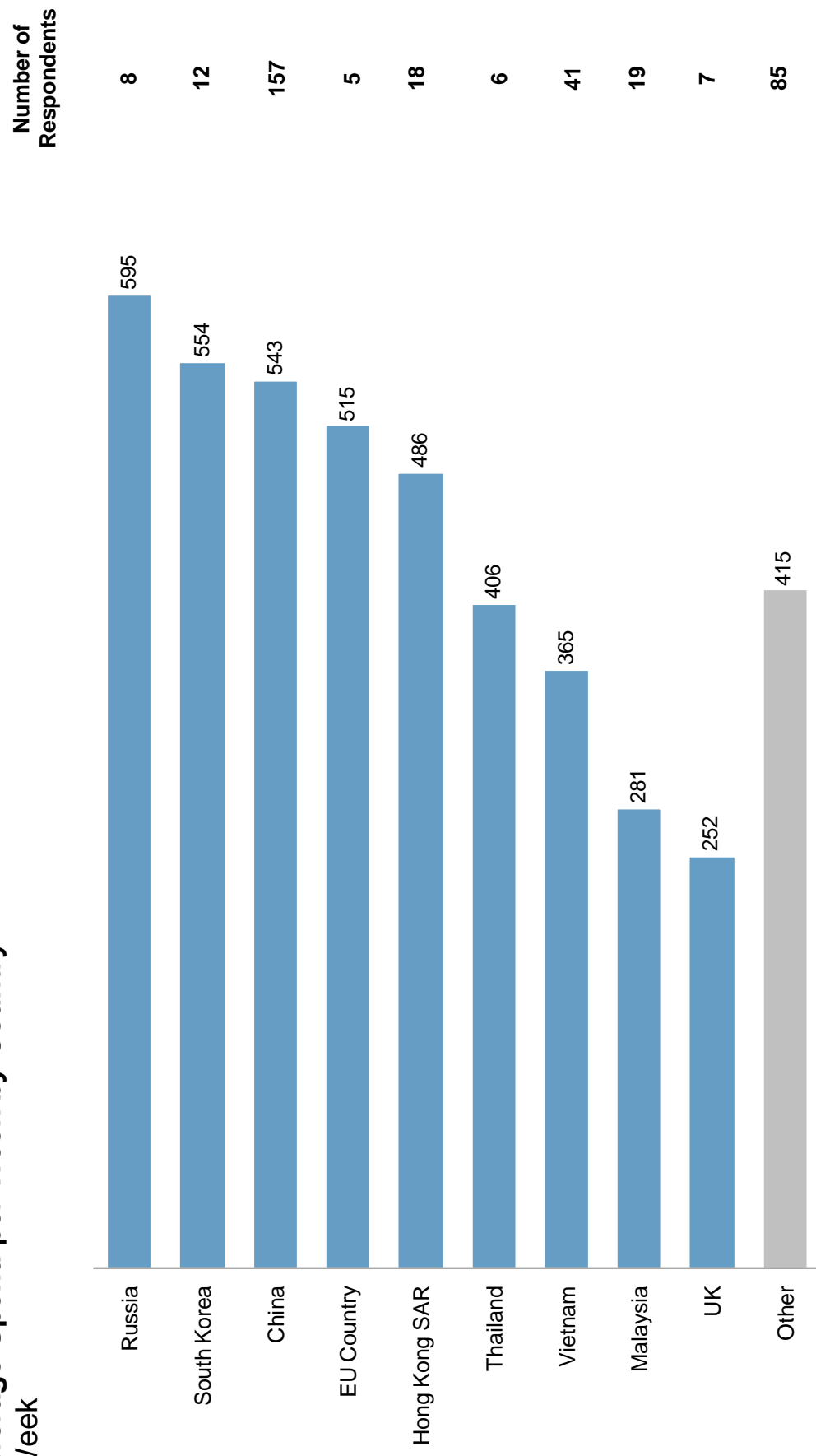


1. Question: How would your weekly spend be allocated during term-time using the categories below? A large number of respondents skipped this question
2. Question: How would your weekly spend be allocated during holidays, using the categories below? A large number of respondents skipped this question

Source: *International Student Survey, OC&C analysis*

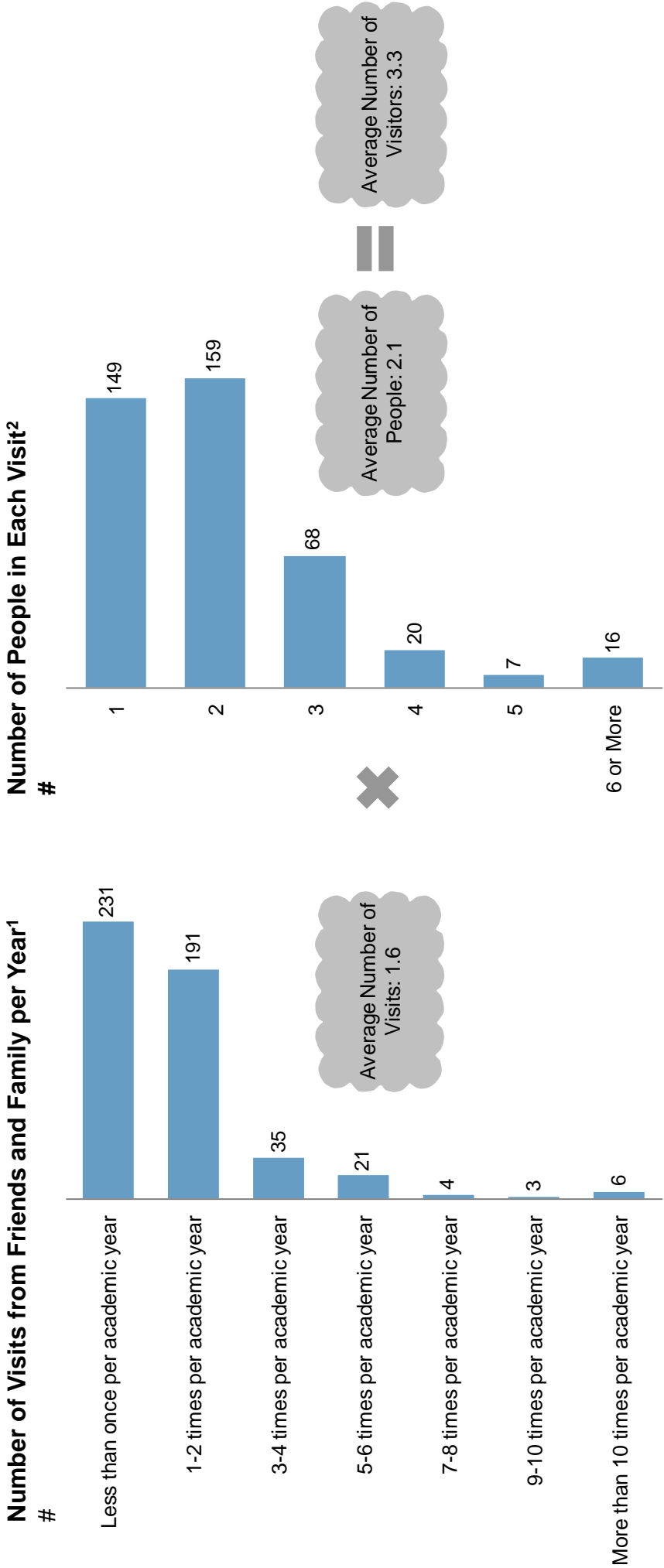
The total spend varies significantly by the nationality of the student, with students from Russia and South Korea spending the most

Total Average Spend per Week by Country¹
£ per Week



In addition to their own expenditure, international students help drive tourism through visiting friends and family, with an average of 3.3 visitors per year

Friends and Family Visits per Year



1. Question: On average, how often do members of your family / friends come to visit from abroad (please exclude visits from family / friends that reside in the UK)?
 2. Question: On average, how many family members / friends visit you each time?

Source: *International Student Survey*, OC&C analysis

Agenda

- Survey of International Students in the UK

- Survey of Chinese Students

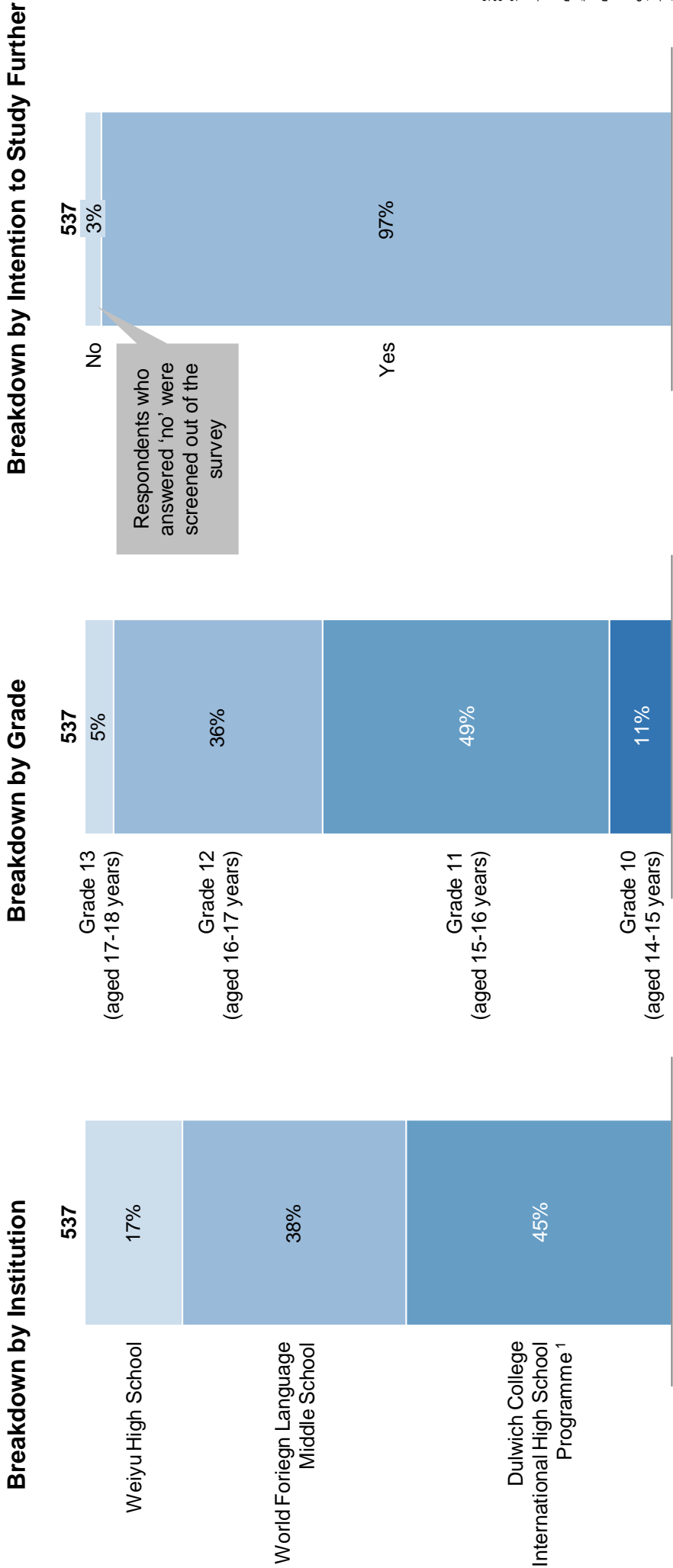
Survey of Chinese Students

Summary

- The survey targeted Chinese students studying for A Levels at selective schools in China, including:
 - The Dulwich College International High School Programme at Zhuhai Huafa Overseas Exchange Training School and SIP Dulwich College United School, Suzhou
 - This Programme provides Chinese students aged 15-18 years with an international curriculum, including the Cambridge IGCSE and A/AS Levels
 - World Foreign Language Middle School
 - Weiyu High School
- The vast majority of students surveyed have the USA as their preferred destination for higher education
 - This is true across the different institutions surveyed and across all subject groups
- Whilst the quality of universities in the destination country is the biggest driver when choosing where to study, employment and visa related issues still rank very highly
 - 39% of respondents said 'Employment Opportunities upon Graduation' was a key driver
 - 34% of respondents said 'Internship Opportunities during the Course' was a key driver
- A high proportion of students who were intending to attend UK universities have, in the last 2 years changed their preference...
- ... of these students, over 40% said that changes in visa regulations were a reason for the change
- Finally, whilst personal preference is the biggest reason for students not choosing to attend UK universities, visa difficulties upon graduation are still a significant contributor (20% of respondents)

In total, we interviewed 537 students at 3 different schools, across 4 different grades. Of these 97% were planning on pursuing higher education

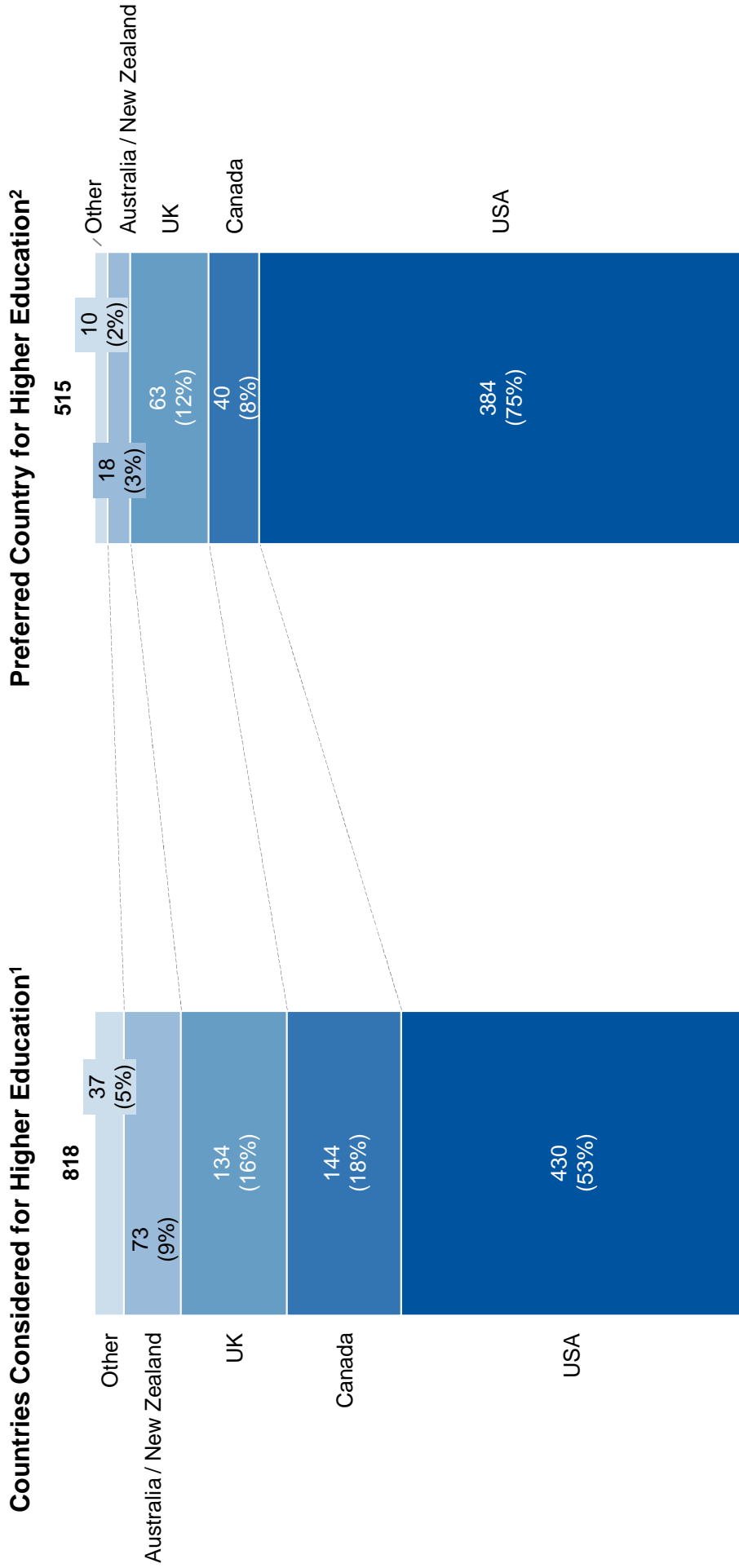
Breakdown of Respondents #, %



Whilst many students consider studying in the UK, the vast majority (75%) have the US as their preferred destination

Countries Considered and Preferred Country for Higher Education

#, %



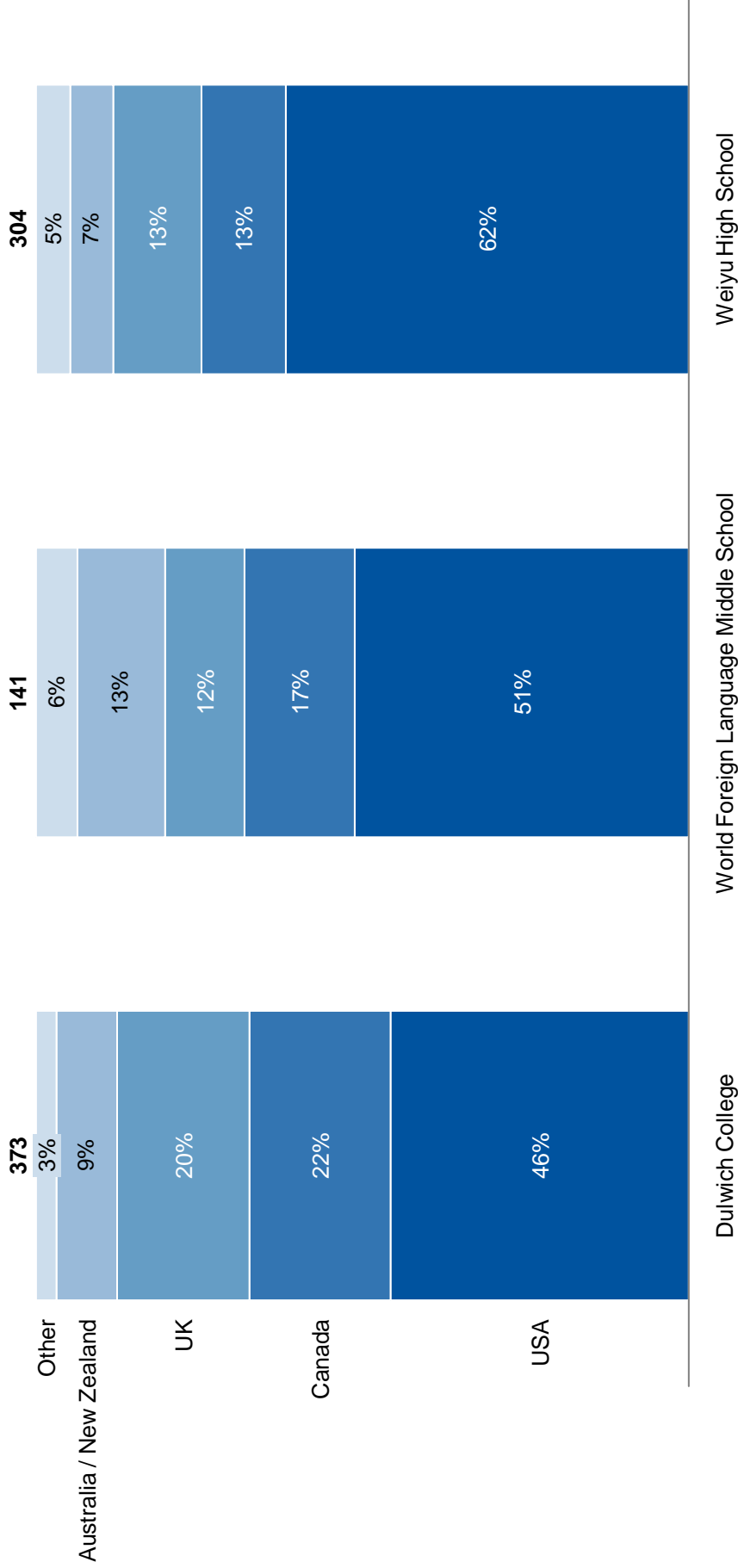
1. Question: Which country or countries are you considering for your destination for higher education (tick all that apply)?
2. Question: Which country is your preference for higher education study?

Source: Student Interviews, OC&C analysis

Dulwich College has the most variation in destinations considered, with a higher proportion of students considering non-US destinations

Countries Considered for Higher Education by Institution¹

#, %



Dulwich College International High School Programme World Foreign Language Middle School Weiyu High School

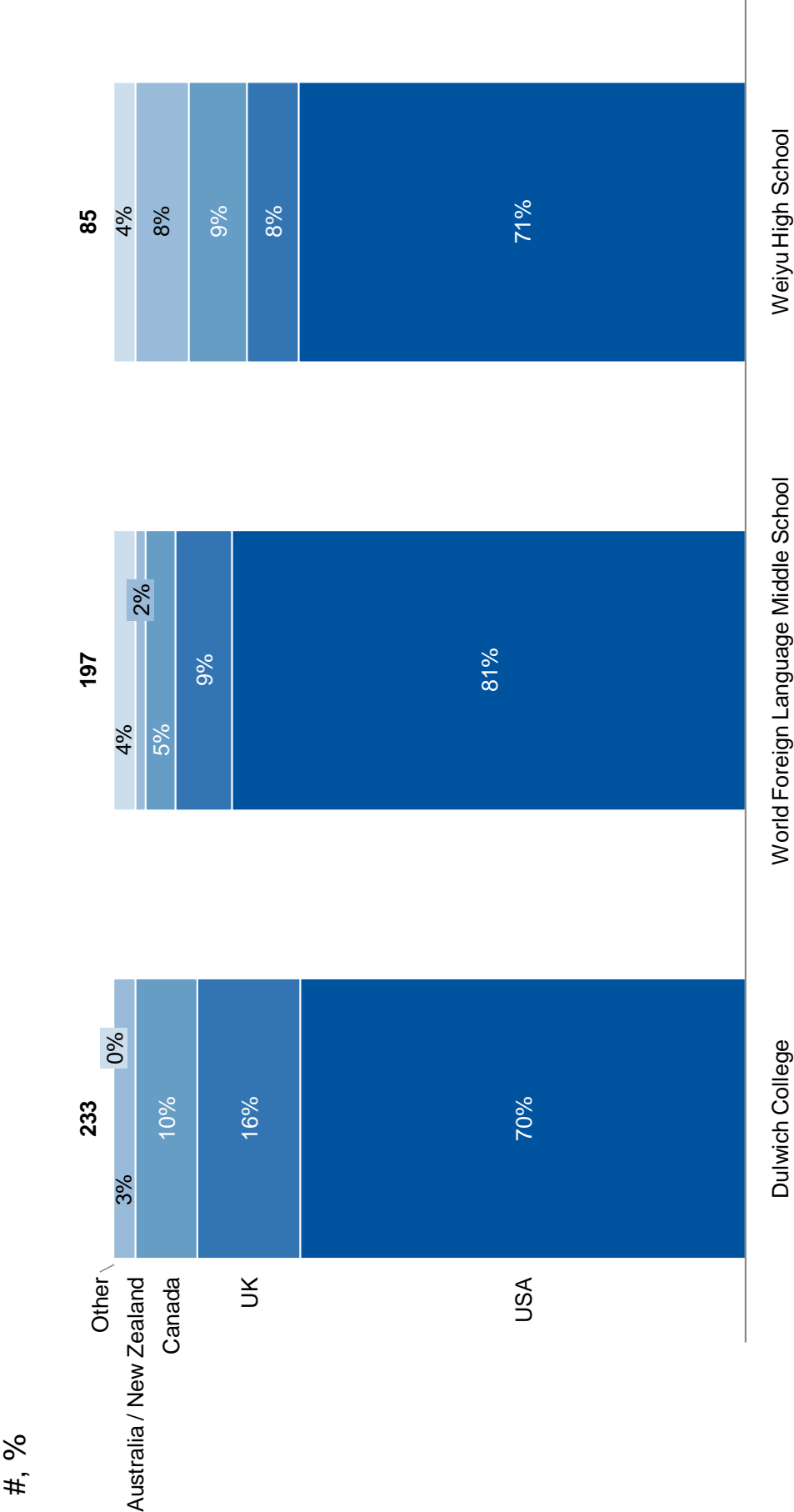
1. Question: Which country or countries are you considering for your destination for higher education (tick all that apply)?

Source: Student Interviews, OC&C analysis

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Whilst there is some variation by institution, the US remains the firm favourite, with over 70% preference across the board...

Preferred Country for Higher Education by Institution¹



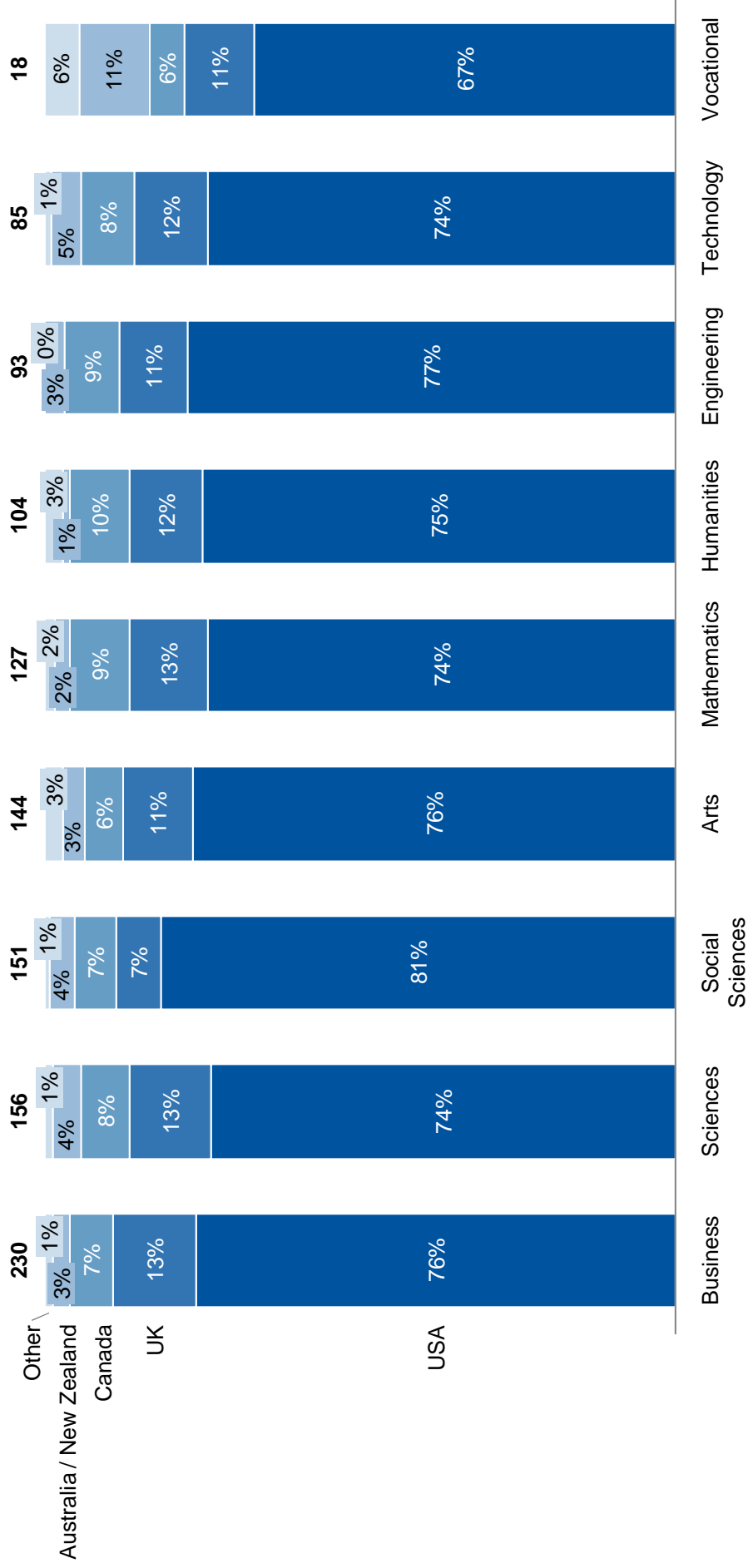
1. Question: Which country is your preference for higher education study?

Source: Student Interviews, OC&C analysis

... similarly, the US is the preferred destination across all subject groups

Preferred Country for Higher Education by Subject^{1,2}

#, %



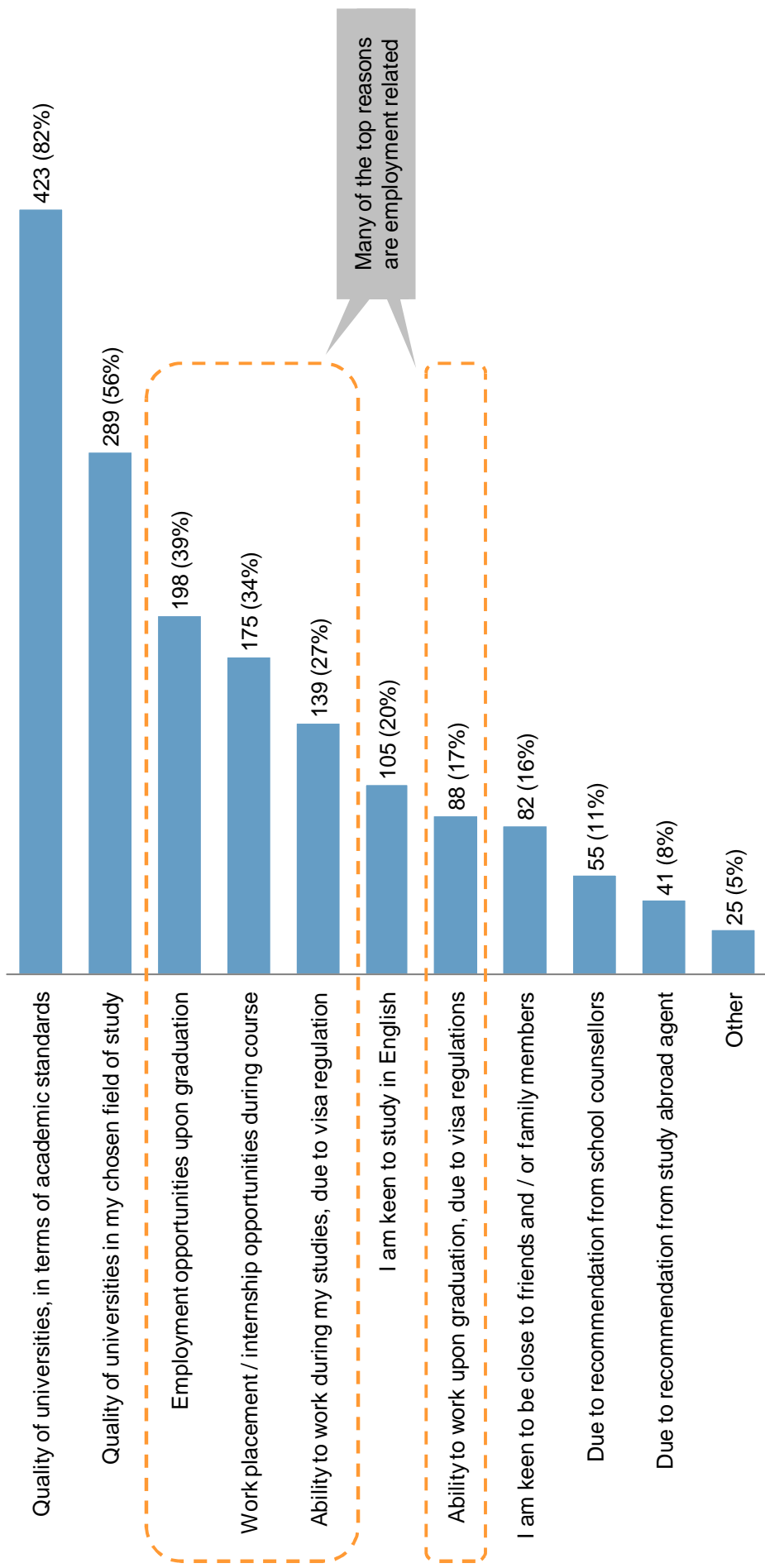
1. Question: Which country is your preference for higher education study?
2. Question: Which subject or subjects are you considering studying for your undergraduate degree?

Source: Student Interviews, OC&C analysis

The main drivers behind country choice are ‘Quality of Universities’ and ‘Employment Opportunities’ upon graduation

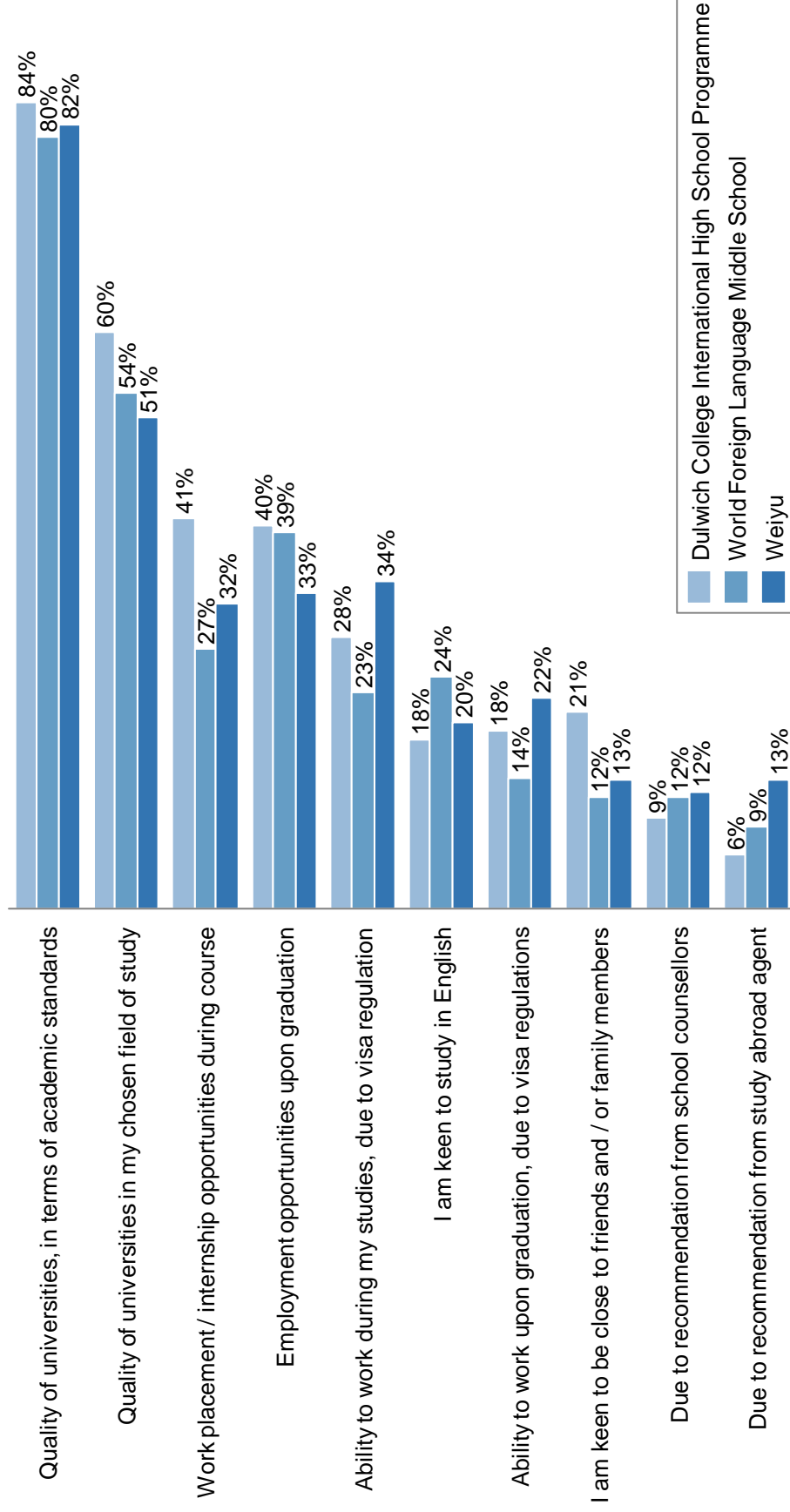
Drivers of University Country Choice¹

#, %



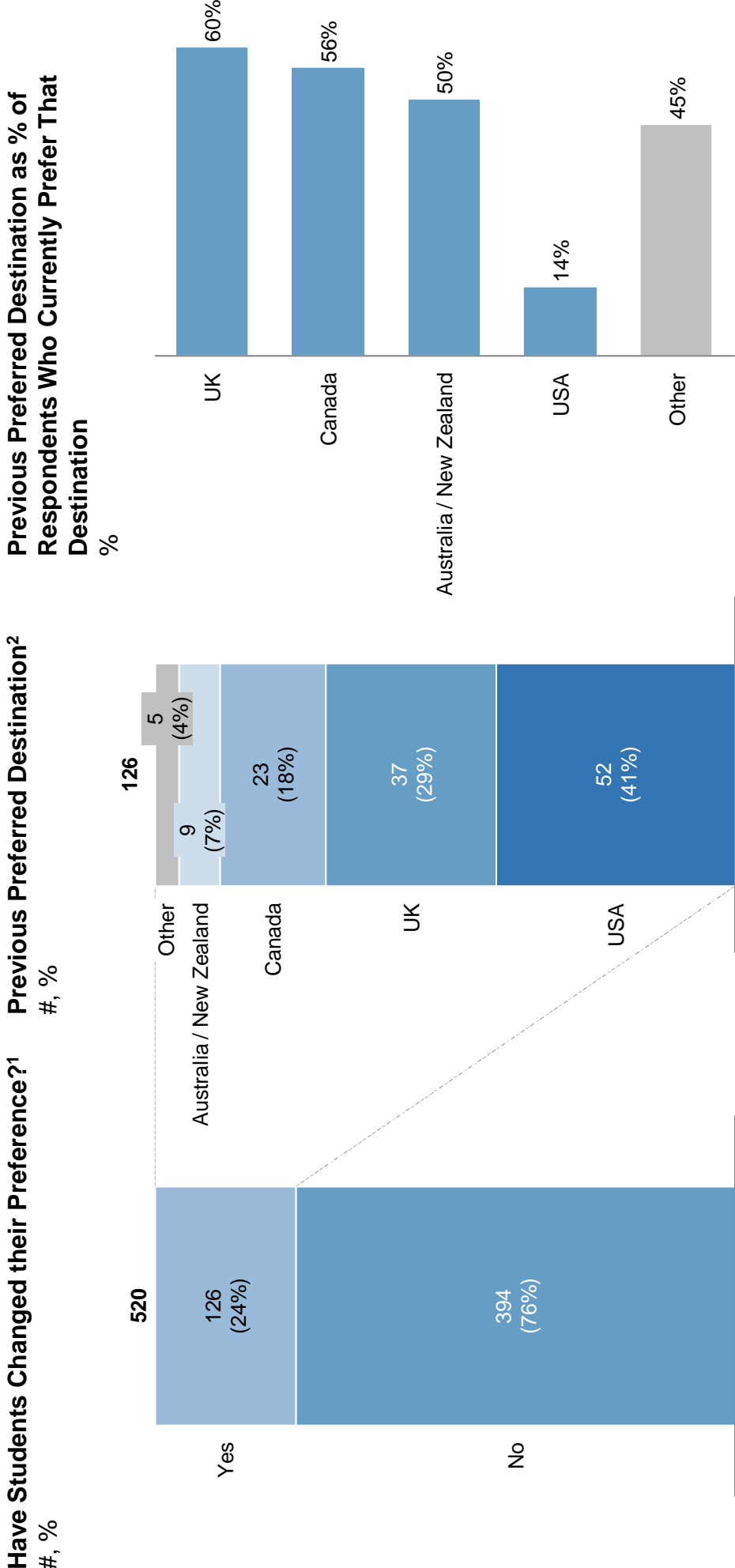
Backup: Drivers of University Choice by Institution

Drivers of University Country Choice by Institution¹
%



There has been a recent shift in terms of students who were planning on going to study in the UK, now preferring to go elsewhere....

Country of Study Preference Change



1. Question: Has your preferred destination for Higher Education study changed in the past 12-24 months?
 2. Question: What was your previous preferred destination before you changed to your current preferred destination

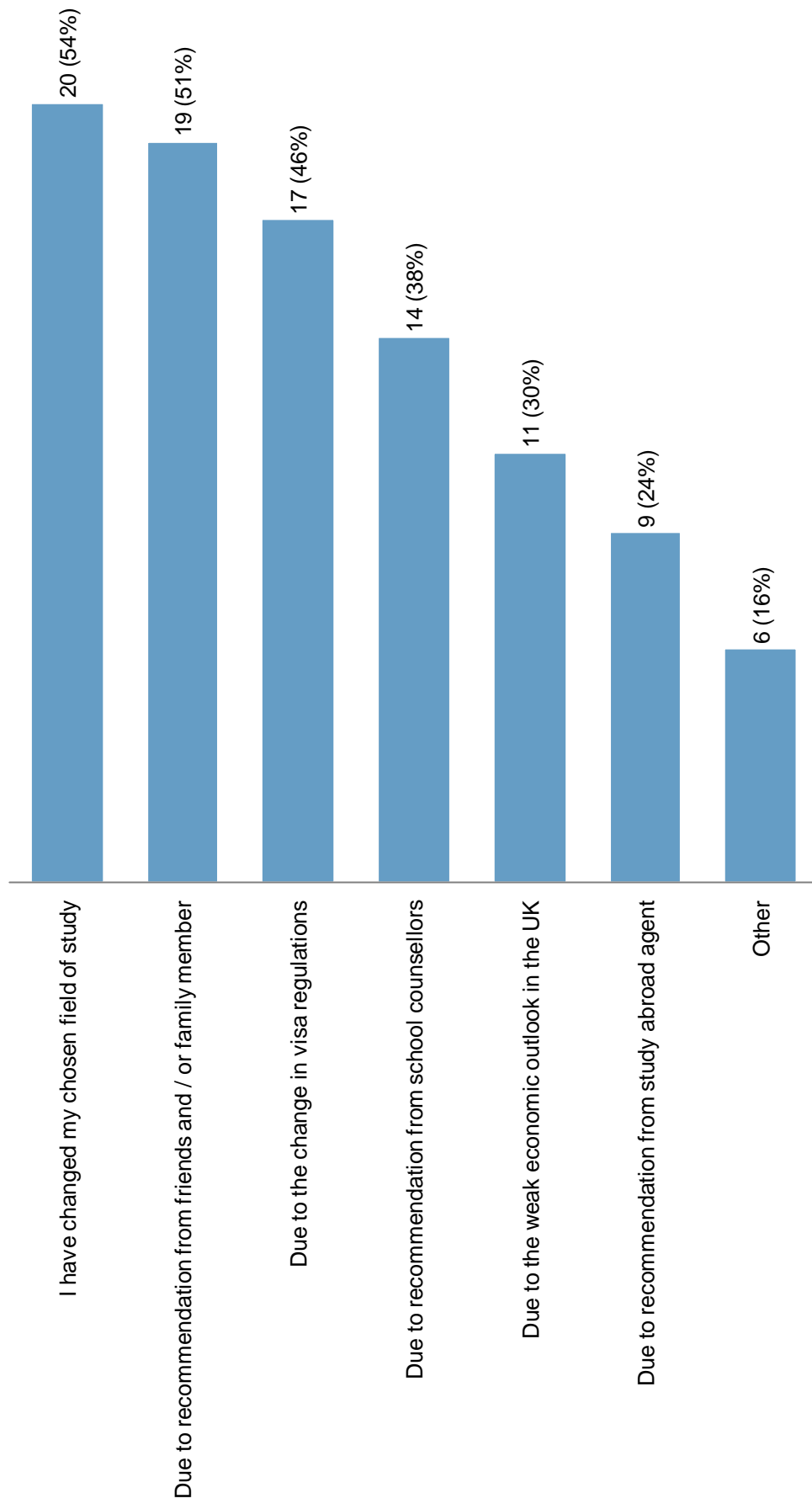
Source: Student Interviews, OC&C analysis

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... a key driver of this shift has been the change in visa regulations in the UK, with over 40% of respondents who switched saying that this influenced their decision

Drivers of Switching Preference from the UK to Another Market¹

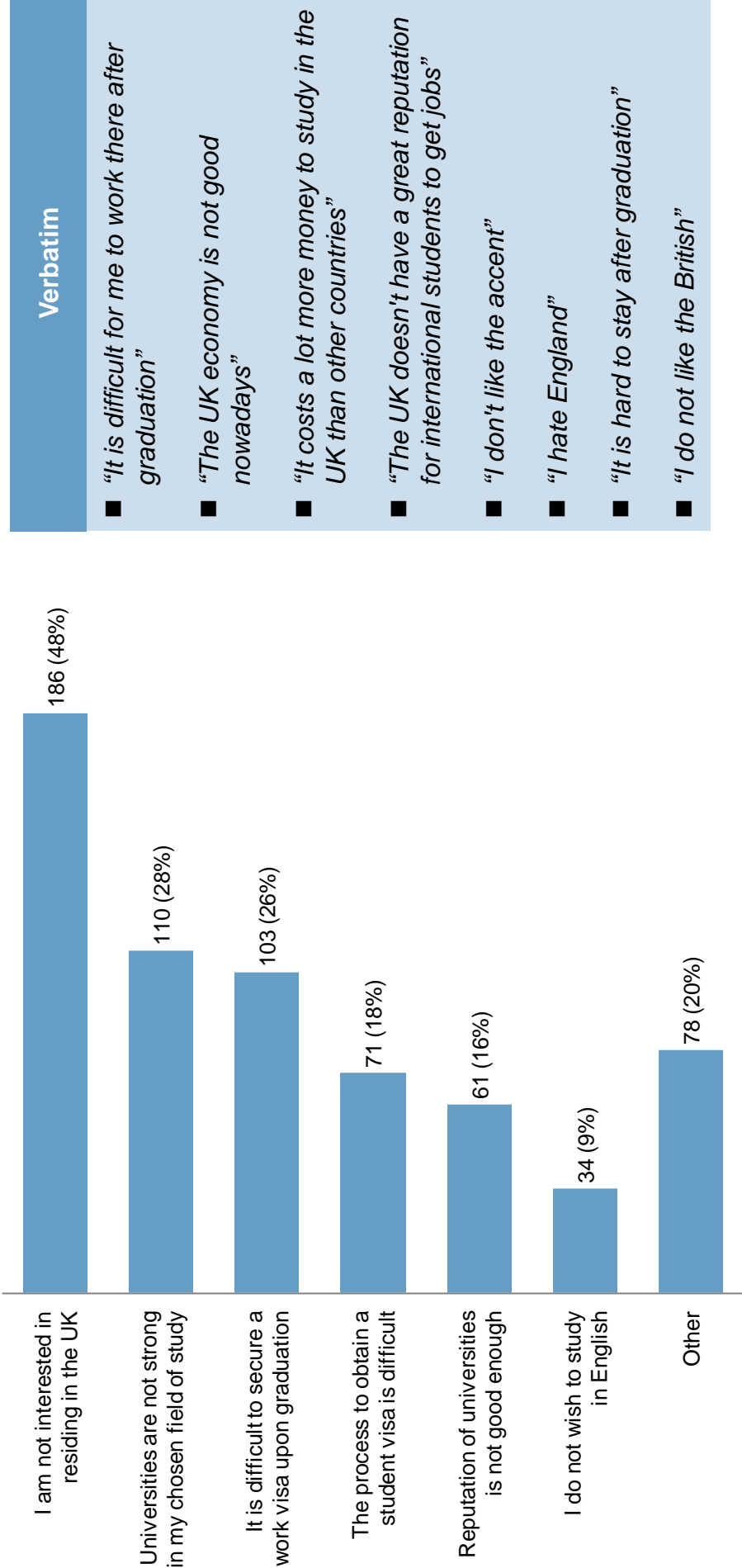
#, %



Furthermore, whilst personal preference is the main reason for applicants not choosing the UK, worries about securing a work visa are a significant driver

Drivers for Not Choosing the UK as Destination for Higher Education

#, %



Verbatim

- *"It is difficult for me to work there after graduation"*
- *"The UK economy is not good nowadays"*
- *"It costs a lot more money to study in the UK than other countries"*
- *"The UK doesn't have a great reputation for international students to get jobs"*
- *"I don't like the accent"*
- *"I hate England"*
- *"It is hard to stay after graduation"*
- *"I do not like the British"*

Agenda

- Survey of International Students in the UK

- Survey of Chinese Students

- **Dulwich College International High School Programme Results**

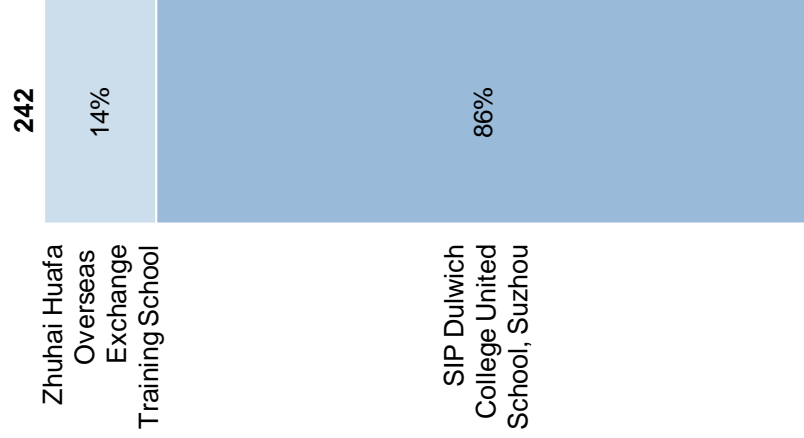
- Discussion Relating to Further Research

Backup: Breakdown of Dulwich Respondents

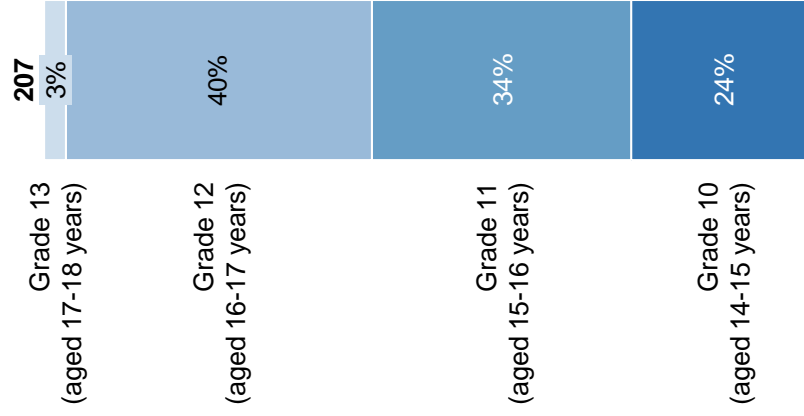
Breakdown of Respondents

#, %

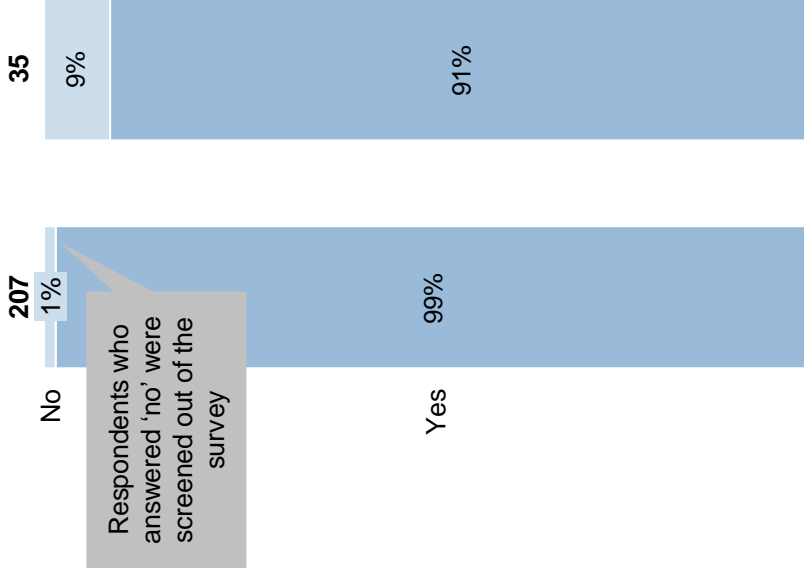
Breakdown by Institution ¹



Breakdown by Grade



Breakdown by Intention to Study Further



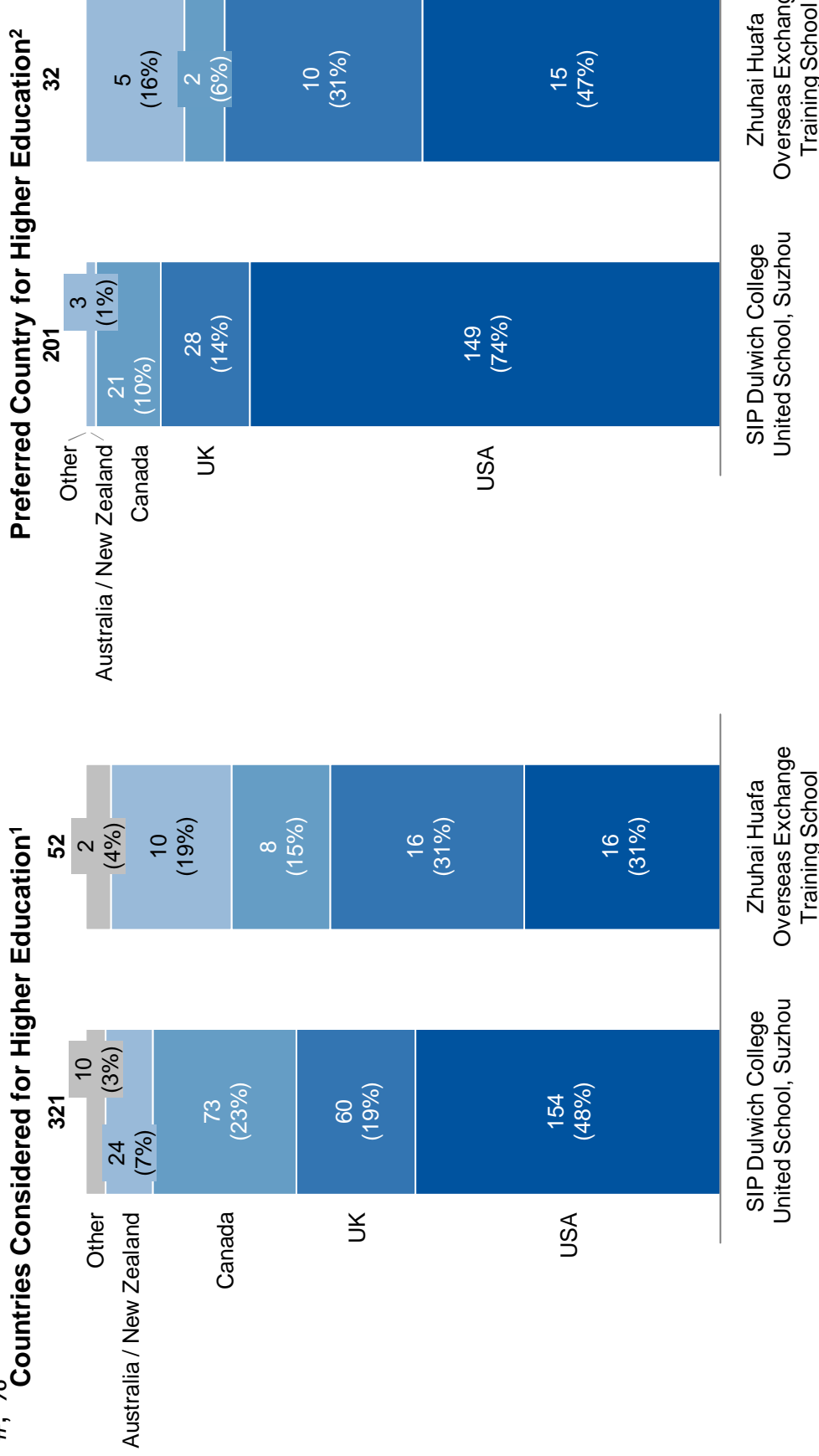
SIP Dulwich College United School, Suzhou
 Zuhai Huafa Overseas Exchange Training School

SIP Dulwich College United School, Suzhou
 Zuhai Huafa Overseas Exchange Training School

Backup: Considered and Preferred Countries for Higher Education

Countries Considered and Preferred Country for Higher Education

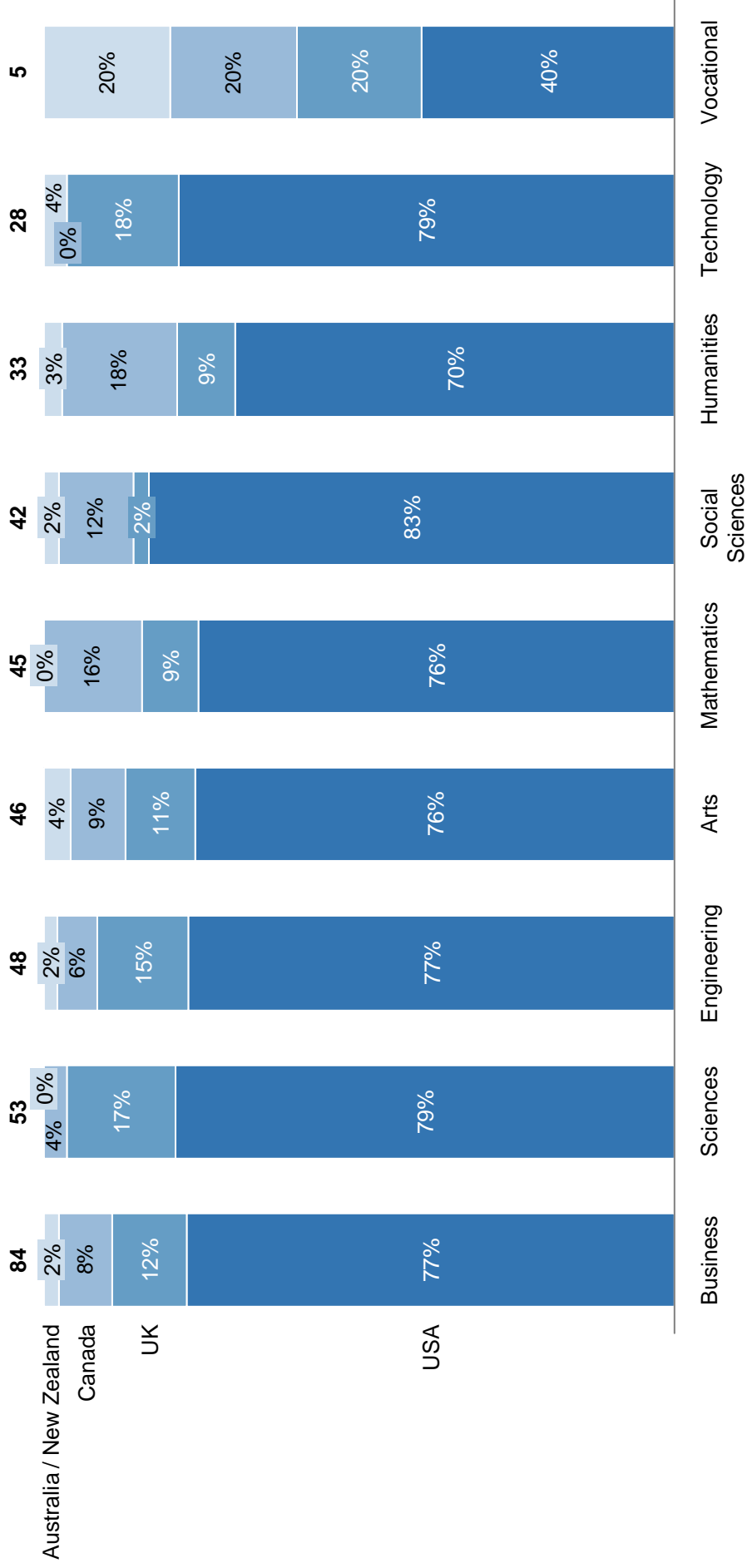
#, %



Backup: Preferred Countries for Higher Education by Subject for Students attending SIP Dulwich College United School, Suzhou

Preferred Country for Higher Education by Subject^{1,2}

#, %



1. Question: Which country is your preference for higher education study?
2. Question: Which subject or subjects are you considering studying for your undergraduate degree?

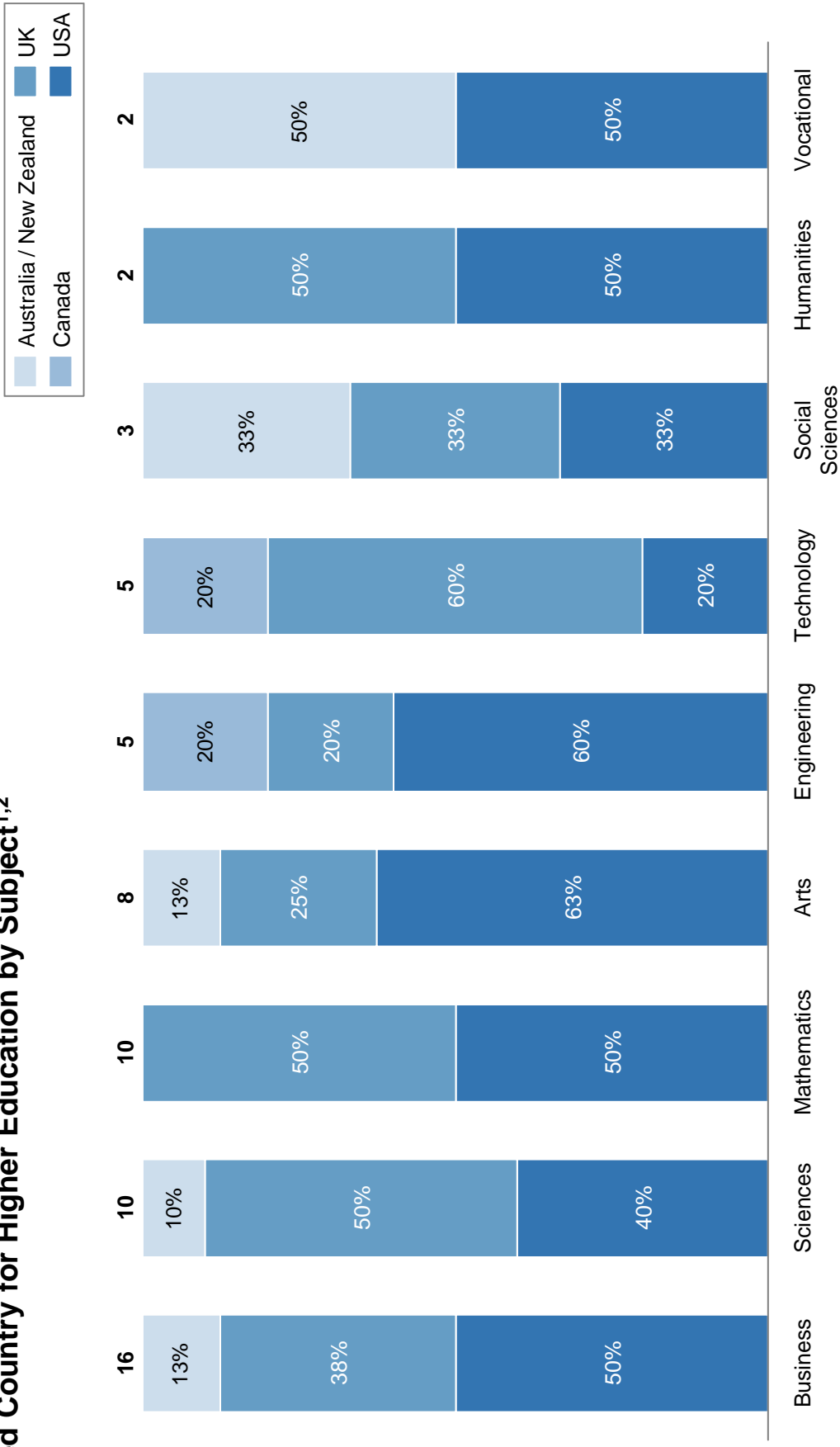
Source: Student Interviews, OC&C analysis

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Backup: Preferred Countries for Higher Education by Subject for Students attending Zhuhai Huafa Overseas Exchange Training School

Preferred Country for Higher Education by Subject^{1,2}

#, %

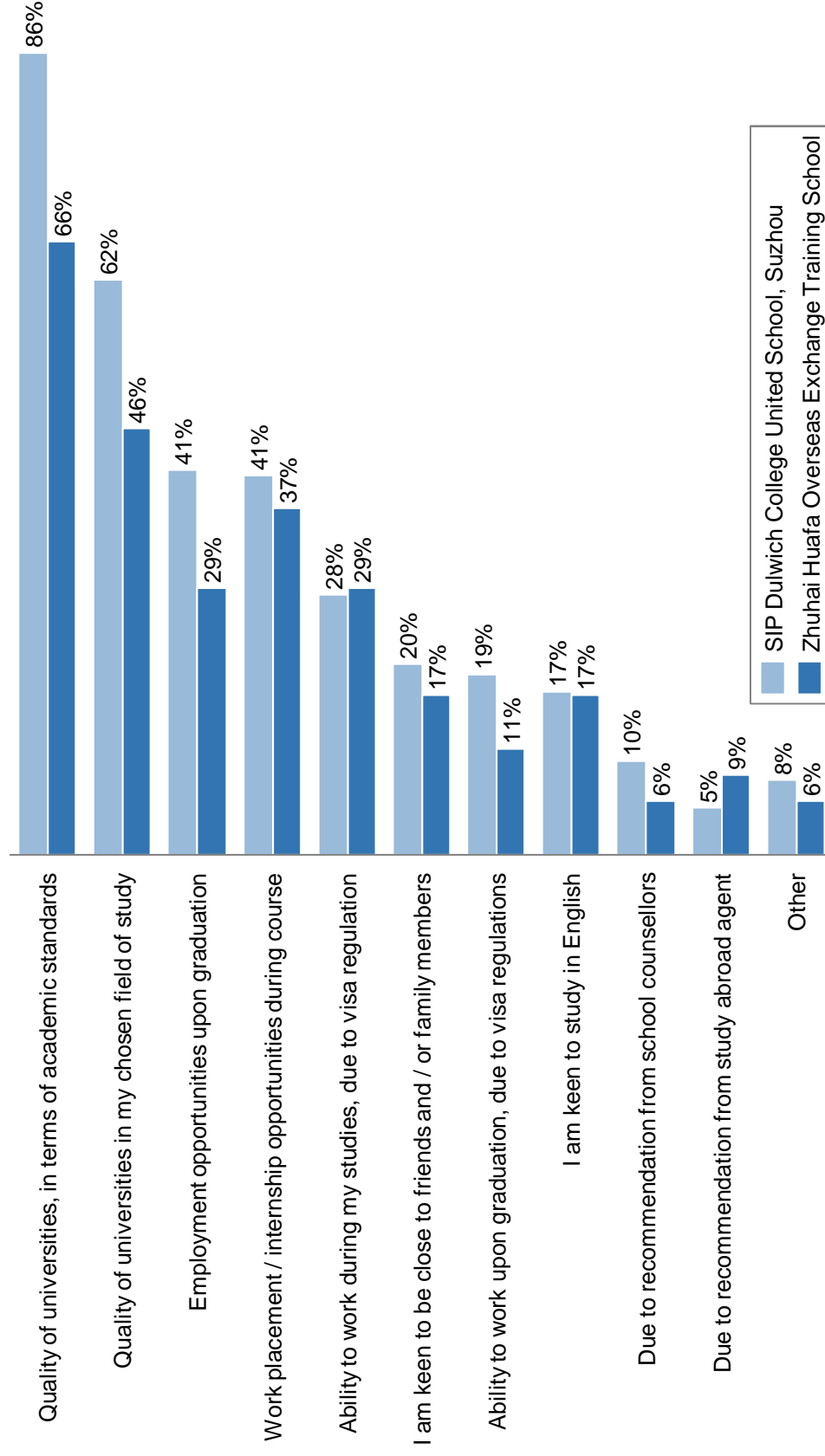


1. Question: Which country is your preference for higher education study?
2. Question: Which subject or subjects are you considering studying for your undergraduate degree?

Source: Student Interviews, OC&C analysis

Backup: Drivers of University Preference

Drivers of University Country Choice¹ #, %



1. Question: Why is [Country] your preferred destination for higher education, tick all that apply

Source: Student Interviews, OC&C analysis

Backup: Changes in University Preferences

Country of Study Preference Change

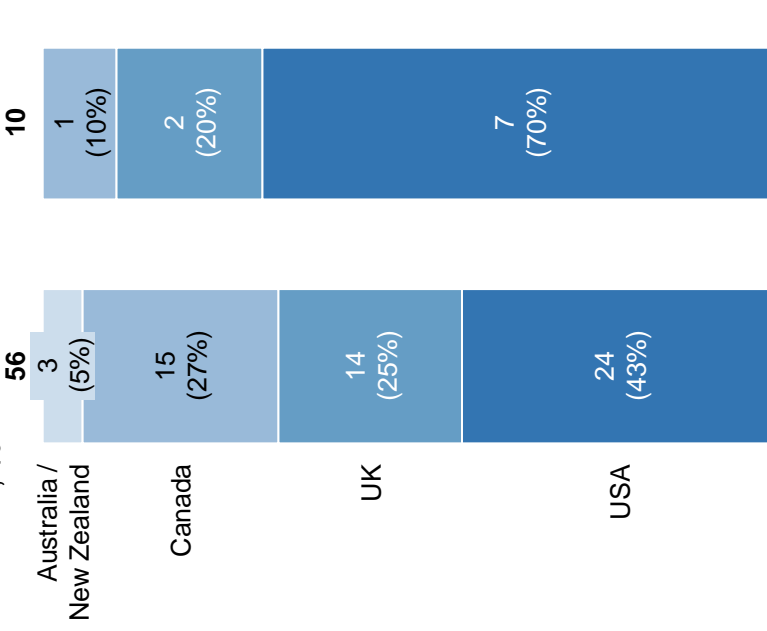
Have Students Changed their Preference?¹

#, %



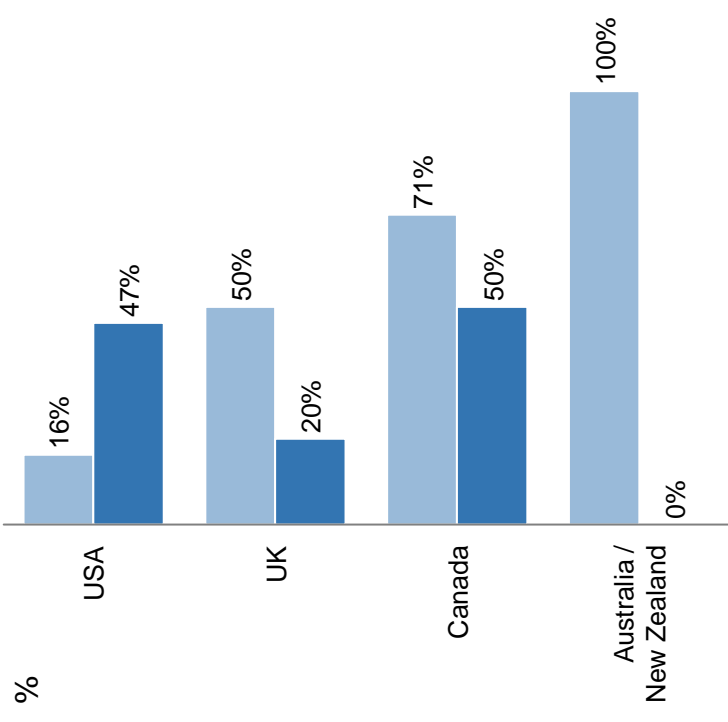
Previous Preferred Destination²

#, %



Low Number of Responses

Previous Preferred Destination as % of Respondents Who Currently Prefer That Destination



SIP Dulwich College United School, Suzhou

SIP Dulwich College United School, Suzhou

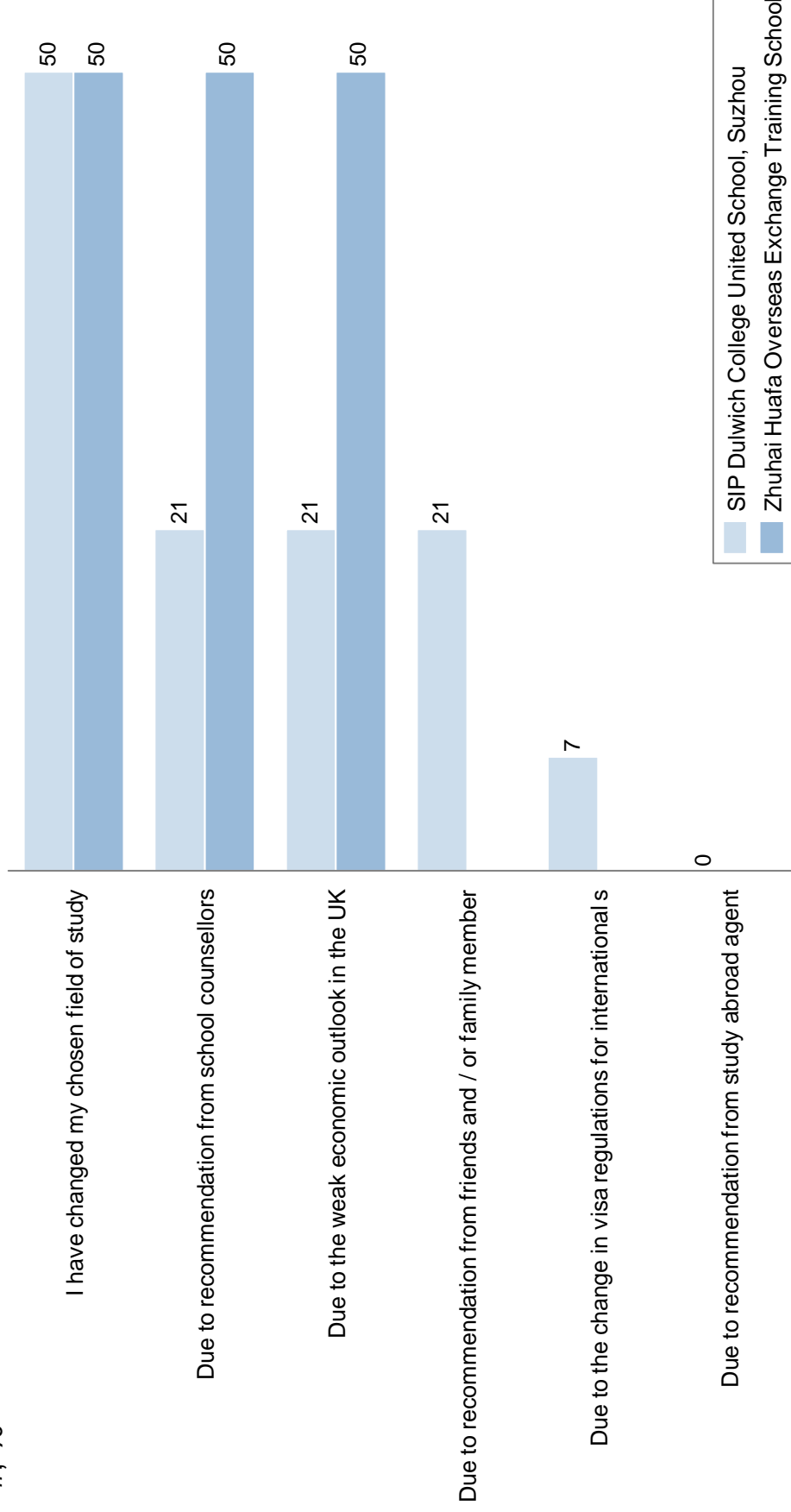
Zhuhai Huafa Overseas Exchange Training School

Backup: Drivers of Changes in University Preferences

Divers of Switching Preference from the UK to Another Market¹

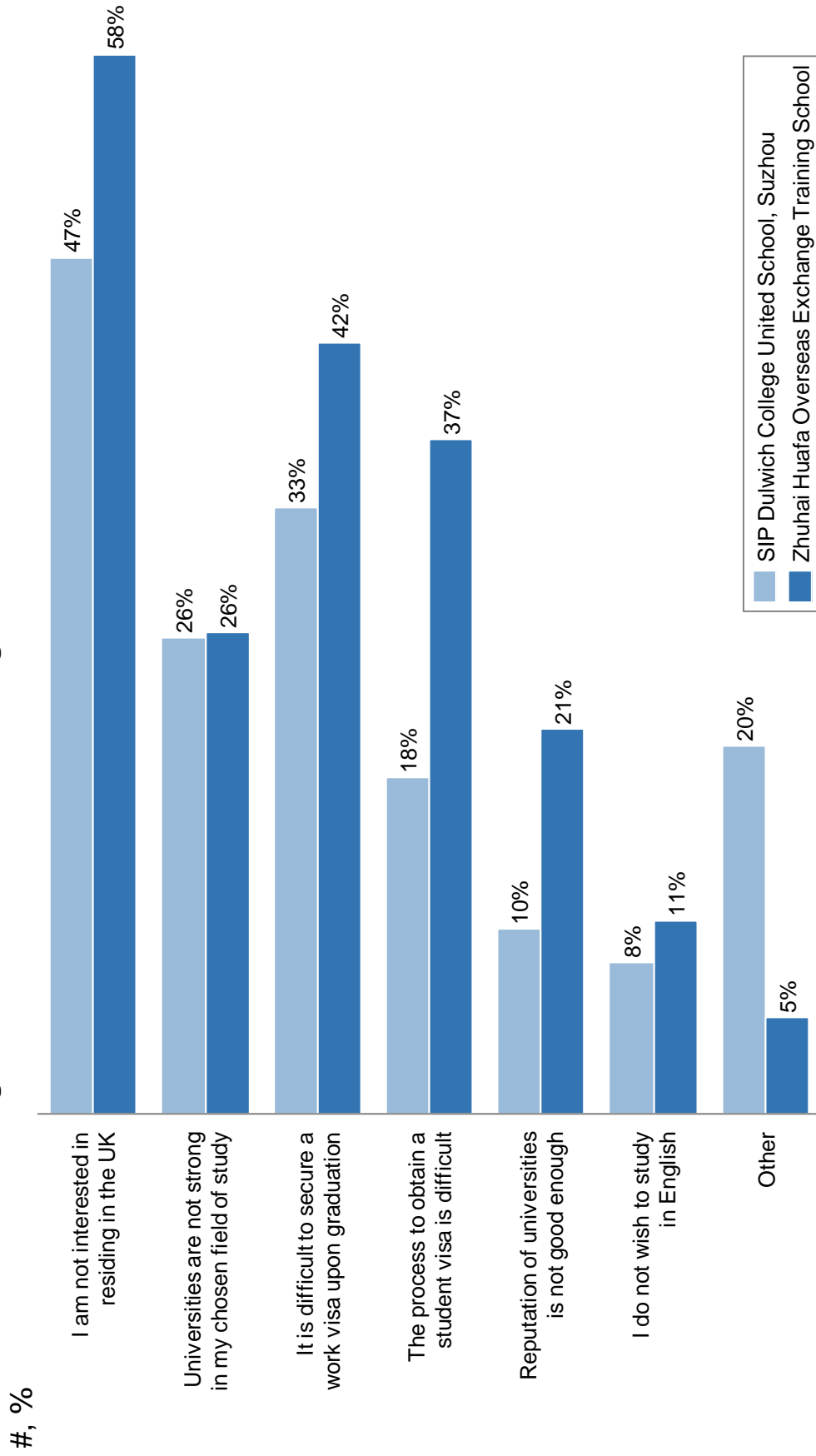
#, %

Low Number of Responses



Backup: Reasons for Not Choosing to Study in the UK

Drivers for Not Choosing the UK as Destination for Higher Education



1. Question: Why did you not choose the UK as the destination market for your higher education studies?

Source: Student Interviews, OC&C analysis

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