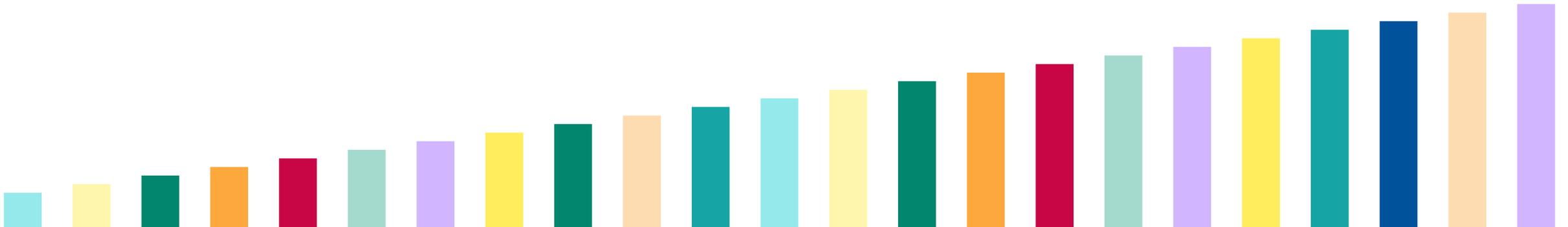


# International Student Recruitment from Europe: The Road to Recovery

Part of the *Why Aren't We Second?* series



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# Executive summary

European students have historically made up around a third of all the international students in the UK. They make vital contributions to campuses and courses across the country, but following the UK's exit from the European Union, the fundamental assumptions which underpin the flow of European students coming to study at UK universities have changed. Most European students wishing to start a course of study in the UK now require visas and no longer have access to domestic fee levels or tuition fee loans, dramatically changing the UK's proposition as a destination of choice for European students.

This report, which is a collaboration between Universities UK International (UUKi) and Studyportals, investigates the current state of European student recruitment to the UK for degree study, utilises student search behaviour data to forecast how these changes will likely be borne out over the coming academic years, and provides recommendations for the UK HE sector and government to protect and develop European student recruitment.

## Trends in European student recruitment

HESA data show that while EU student numbers continued growing in the years following the EU referendum result to 2020–21, this growth was driven by increasing undergraduate numbers, masking declines in postgraduate taught and postgraduate research student numbers. The more recent UCAS data show a 37% drop in European undergraduate applications from 2020 to 2021 and a 47% drop in acceptances. As a result, we are likely to see a close to 50% decrease in first-year EU-domiciled undergraduate enrolments in 2021–22 compared to 2020–21. Applications at the June deadline show a decrease of 18% in applications for 2022 compared with 2021 and a slowing of the trajectory of decline.

Data from Studyportals shows European student interest in studying in the UK, measured by page views of UK courses, dropped 28% from 2019 to 2022. The UK lost 5.9 percentage points of its total share of the European student interest market in this period. Using the Studyportals data as indicators of future enrolment, we may expect the HESA data to show significant drops in European first-year enrolments in the 2021–22 academic year, reaching a low point in either 2022–23 or 2023–24.

# 37%

drop in European undergraduate applications through UCAS from 2020 to 2021

# 28%

drop in page views of UK courses from 2019 to 2022

## The UK and its competitors – changing European student interest

Studyportals data also illuminates where European student interest is turning – for the most part towards other European destinations, rather than to alternative anglophone destinations such as the US, Canada or Australia. European students' attention has turned to courses in EU countries with large established higher education systems offering high numbers of courses in English, such as the Netherlands, Germany, Italy, Ireland and France.

The report identifies groupings of key European source countries where opportunities for UK providers might be found

# Country analysis and recommendations

## Established markets

Long-term largest sources of European students in the UK. Lower reliance on tuition fee loans and comparatively resilient. Student interest data indicates these markets will continue to be key.

Italy  
France  
Spain  
Germany  
Ireland



## High-potential markets

High potential for quick recovery or growth of student numbers, due to lower historic reliance on tuition fee loans and strong demand.

Netherlands  
Belgium  
Switzerland  
Turkey



## Speculative markets

Countries which have demonstrated strong demand for UK degrees, but are likely to be more exposed to tuition fee price sensitivity.

Romania  
Portugal  
Poland  
Greece



## The report also outlines recommendations for UK Government and UK universities to speed up the stabilisation and regrowth of European student recruitment

### 1 Stabilising and regrowing European recruitment should be prioritised as a vital source of diversity and stability

- Recruitment from Europe is vital for many subject areas, contributes to the diversity of UK campuses and may present lower risks than other major sources of international students.
- As a new region, effectively, of international students right on our doorstep, we should reposition Europe as an opportunity, not a threat.

### 2 The UK should build on its existing strategic advantages and seize new opportunities in Europe

- Advantages such as geographic proximity, cultural links, the appeal of one-year masters programmes, and the strong reputation of the UK university system ensure that a core of students with the means and desire to self-fund study in the UK exists and can be further developed.
- We must implement the action from the UK International Education Strategy to build the evidence base on international graduate outcomes, including those of European students, using the Graduate Route.

**39.5%**  
of the UK's international undergraduate student population is from Europe

### 3 Practical barriers to study in the UK should be reduced and tailored messaging should be crafted to appeal to European students

- The competitive advantage of the UK will require diligence and action to maintain in the face of increased global competition, through promotion and targeted communication of opportunities such as the Graduate Route, the reduction in financial barriers such as the upfront health surcharge, and a more joined up approach to visas for inbound students across the different visa categories.

### 4 The UK should support and promote a broad range of education internationalisation activities and initiatives which can provide a cross-cutting benefit to student recruitment

- Mobility programmes, research collaboration, and transnational education engagement with Europe can all enhance the brand of UK HE among potential international students. The incredibly strong brand of UK online education can also be further built upon to diversify and support recruitment income streams.

# Introduction

**The UK has long been the number one international study destination of choice for students across many European countries, but the UK's exit from the European Union challenges this position.**

When the UK was a member state of the European Union, EU, EEA and Swiss nationals were eligible for home fee status and tuition fee loans and did not require a visa to study in the UK. Following the end of the transition period on 31 December 2020, the rules for European students have changed and most who started their course from the 2021–22 academic year onwards were not eligible for home fee status or tuition fee loans and were required to apply for a student visa through the new student route.

European students make a vital contribution to universities and communities across the UK, so it should be a priority of the sector and government to mitigate and arrest the decline in the number of European students choosing to study in the UK precipitated by the newly heightened barriers to entry.

This report provides an analysis of historic patterns in European student recruitment, examines recent trends to identify the impacts of Brexit and Covid-19, and harnesses search behaviour data from Studyportals to understand where European student interest is likely to turn next. From these insights we draw conclusions about future opportunities for UK universities and offer recommendations for how the sector – and government – can reorient the approach to attracting students from Europe in the new global context.

**The UK may be about to lose its position as the top destination for many European countries**

## Why aren't we second? But we were already first!

In August 2020, UUKi, together with Education Insight, published a first report, *International Student Recruitment: Why aren't we second? Part 1*, to better understand in which of the world's top 21 sending countries and territories the UK is underperforming. This was followed in September 2021 with the publication of *Why aren't we second? Part 2*, a collaboration between UUKi and IDP Connect which provided a deeper dive into macro-trends in eight of the 21 countries, student behaviours, and comparisons of the policy environments in competing recruiting countries.

This report follows in the footsteps of these previous parts with the aim of providing strategic insight to support the UK university sector's ambitions to remain a global hotspot for international students.

However, the titular question itself may be a little less applicable to this report – it refers to the UK's position for many years as the second most popular international student destination after the US, which came under increasing challenge from Australia and Canada in recent years. It is less applicable for this report as, when it comes to European international students, the UK has historically been the single most popular destination, ahead of Germany and the US. As we will see shortly however, the UK may be about to lose its position as the top destination for many European countries and many of the same challenges regarding maintaining, regaining, and developing the UK's market position apply in Europe, albeit within quite a different historical context.

## Geographical scope

To provide a comprehensive overview of European student recruitment this report analyses data from a range of sources. This does, however, create a challenge in defining the geographical scope of the report, as different datasets use different boundaries for which countries and territories are and are not counted as being in ‘Europe’.

- HESA data referenced in this report includes 60 countries and territories within its definition of Europe. This includes all EU and EEA members, other countries physio-geographically within the continent of Europe such as Russia and Turkey, and overseas territories of European countries such as Guadeloupe.
- UCAS data includes the same 60 countries and territories as the HESA data.

- UNESCO data includes 47 countries and territories within its definition of Europe. This includes all EU and EEA members, other countries physio-geographically within the continent of Europe such as Russia and Turkey, but not Kosovo and Moldova and not overseas territories of European countries.

- Home Office visa data includes 48 countries and territories, including all EU and EEA members, and other countries physio-geographically within the continent of Europe such as Russia and Turkey.

- Studyportals data covers search interest from students based in EU and EEA countries, and Switzerland. A sub-group of 10 countries from this group have been selected to explore some trends in more depth. These 10 countries (Germany, Greece, Netherlands, Italy, France, Spain, Romania, Portugal, Switzerland, and Poland) have been selected as they represent some of the historic and emerging largest source countries of European students to the UK.

For the purposes of the report, the term ‘European’ is used interchangeably to refer to the group of countries covered by the data source being referred to at the time. Where possible, specific terms such as EU or EU/EEA have been used to maximise accuracy.

## Data context

With the majority of fee and immigration status changes for European students coming into effect from the 2021–22 academic year onwards, the HESA data does not yet reveal the impact of these changes. It does, however, show us the recruitment picture from the referendum decision up until these changes came into effect. A drop-off in the total number of European students studying in the UK is not yet visible. Strong undergraduate recruitment in the 2020–21 academic year, especially from Romania, Spain, Poland and Portugal, has obscured stagnant recruitment from Germany, Italy, France, Greece and Ireland. Total postgraduate taught and research student numbers have begun to fall but, are not yet in steep decline.

Data from UNESCO, which allows us to benchmark the UK against other country destinations for international students, provides us with data only as recent as 2019. The 2019 data shows the UK as the first or second most popular destination for 29 out of the 47 European countries within the dataset. However, as with the HESA data, this means the impact of the new fee and immigration regimes are not yet shown by these data.

UCAS data and Home Office visa statistics both have an in-year release pattern and therefore provide an early indication that the change in fee and immigration status will lead to a drop in European student numbers, or at least first-year enrolments in the UK in the 2021–22 and 2022–23 academic years.

To provide further insight into where European student interest may be turning next, UUKi partnered with Studyportals to analyse its student search interest data. The foundation of this analysis is the anonymous behavioural data that has been captured from users on the Studyportals' websites since 2013.

This dataset is uniquely large: based on over 52 million users and covering more than 120 countries. These visitors generate more than 200 million programme page views annually. For this report, the data comes from EU/EEA countries and the information has been cleaned, validated and organised.

The Studyportals data covers a large share of the world's supply of English-medium degree-level education as well as a wide range of types of institution, from the larger and highly ranked providers to smaller, less highly ranked providers, totalling up to 3,750 providers across 120 countries.

Throughout this report, page views on programme details pages are used as a proxy for student interest, as this is the strongest and most granular indicator available.

**Studyportals  
data covers  
3,750  
providers across  
120  
countries**



While a single page view has limited meaning, millions of aggregated page views linked to programmes, (sub) disciplines, country of origin, etc. are a powerful indicator to benchmark the level of interest against the institutional, discipline or country average. Analysing the interest over time can give an indication of future growth prospects and the influence of current events and developments on student recruitment.

Another advantage of using this student interest indicator is its timeliness. In contrast to other indicators, such as enrolment data, it is available in (near) real-time. Furthermore, prospective students typically start researching their programme options 6–24 months before enrolment (an average of 15 months). The indicator can therefore give insights about interest-only, materialising in enrolments 1–2 years in the future. The strong correlation between the Studyportals search data and actual enrolment into university programmes has been verified with information from EP-NUFFIC, UNESCO, OECD, HESA and various US datasets for New York, Ohio, Texas, Pennsylvania and Massachusetts.

The Studyportals data reveals that interest in UK courses from students in EU and EEA countries has dropped significantly over the last three years. However, it does also give us an insight into when the decline in European enrolments may begin to stabilise, and where pockets of resilience and opportunity might be found.

# Long-term trends: UK performance in context

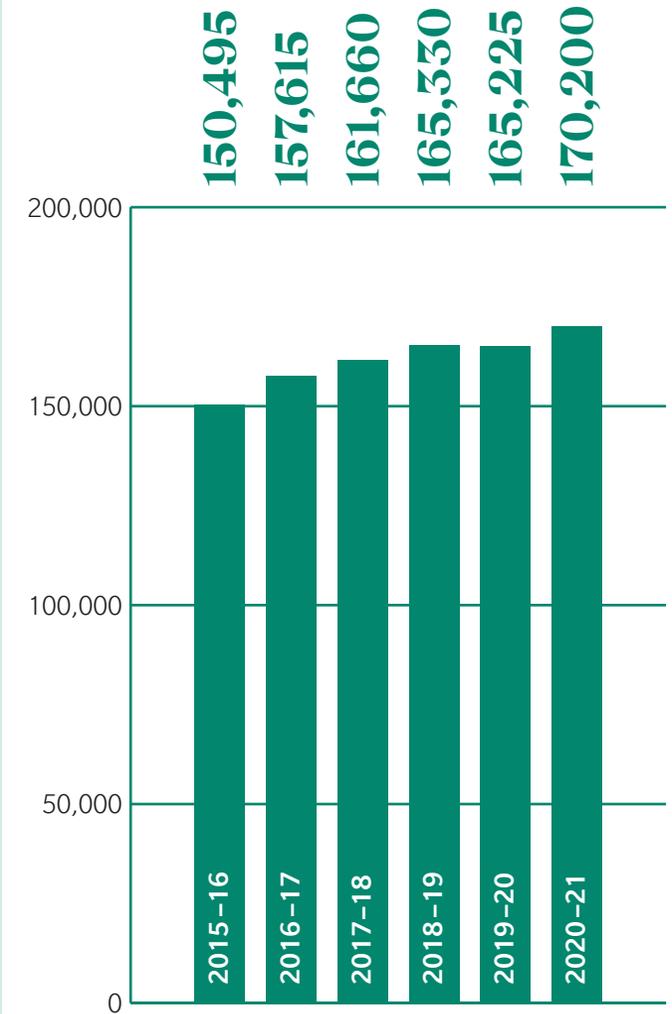
What can different data sources tell us about the changing landscape of European student recruitment?

## How many European students are there in the UK for full degree study?

European student recruitment has long been vital to the UK higher education sector, with the region providing the second largest continental source of students in the UK behind Asia. As seen in Figure 1, between 2015–16 and 2020–21, EU student numbers in UK higher education grew steadily from over 150,000 students to over 170,000 students.

In the context of the wider growth in international students, European students as a proportion of all international students in the UK had remained at around 33–35% for ten years from 2009–10, before declining slightly to 30% in 2019–20 and then to 29% in 2020–21. Students from European Union countries have made up the bulk of this recruitment, accounting for between 86% and 89% of the total number of European students in the UK each year for the past 10 years. With a population of over 447 million<sup>1</sup> people, the European Union has long been the single largest source of non-UK domiciled students and a key driver of diversity in the UK student cohort, both in terms of nationalities represented and subject areas studied. This is important in the context of an increasing focus on diversification as a priority in both the UK government and individual institutional strategies for achieving sustainable growth in student numbers.

Figure 1: European student numbers in UK HE, 2015–16 to 2020–21



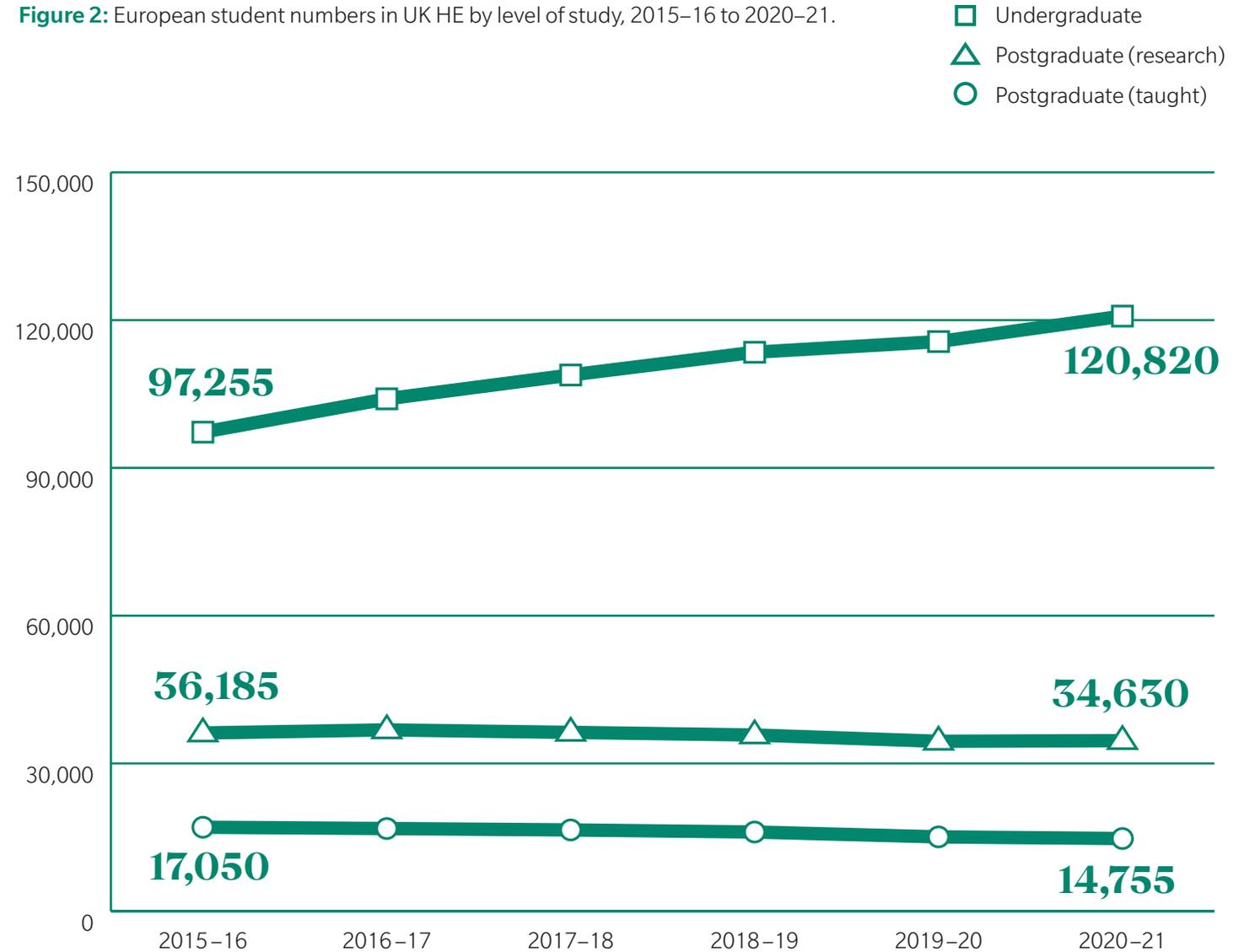
Data source: HESA Student record, multiple years

<sup>1</sup> Total population of the European Union. Statista. Accessed 30 August 22: [www.statista.com/statistics/253372/total-population-of-the-european-union-eu/](https://www.statista.com/statistics/253372/total-population-of-the-european-union-eu/)

## The total number of students from Europe studying in the UK increased by 8% between 2016–17 and 2020–21

Following the confirmation of the EU referendum result in 2016, there was significant uncertainty around what the future of European student recruitment to the UK may look like. There was a possibility that student sentiment would turn strongly against the UK as a study destination, and as a result student numbers would drop in the years following 2016. Thankfully, the data shows that this has not been the case for numbers overall, as EU numbers continued to grow in the years following the referendum driven by sustained growth in undergraduate numbers. However, declining numbers of postgraduate students are evident in the years following the EU referendum.

**Figure 2:** European student numbers in UK HE by level of study, 2015–16 to 2020–21.



Between 2015–16 and 2020–21, EU student numbers in UK higher education grew steadily from over 150,000 students to over 170,000 students. When broken down by study level as in Figure 2, we can see that the increase is driven by strong growth of 16% in undergraduate student numbers. At postgraduate research level, numbers started to decline year-on-year from 2016–17 onwards, declining by 12% in the past five years. Postgraduate taught students started to decline from 2017–18 onwards, and declined by 6% overall during the five-year period, but showed some recovery in 2020–21.

The decline in postgraduate student numbers, particularly postgraduate research students, may reflect a greater sensitivity to uncertainty around future post study work opportunities and research careers in the UK, whereas for undergraduate students, access to home fee status and tuition fee loans may represent a more significant influence on the decision to study in the UK.

For this reason, the increase in student numbers up to and including the academic year 2020–21, particularly at undergraduate level, may be driven in part by students whose fee and immigration statuses would change from 2021, bringing forward their study plans in order to benefit from the terms of the transition period. This may, in turn, reveal a ‘bubble’ effect, where student numbers, particularly from less affluent countries, suddenly fall quickly.

## What proportion of internationally mobile European students study in the UK?

According to UNESCO data, the UK proudly attracts more European students than any other country around the world and is an incredibly popular destination at an individual European country level. As described in Table 1, the UK was the most popular destination for students from 16 countries in Europe, ahead of Germany – which ranked first for seven European countries. Indeed, the UK was the first or second most popular destination for 29 out of the 47 countries in Europe for which UNESCO has available data.

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**European countries have the UK as their first or second most popular destination**

**Table 1:** Frequency table showing destinations of European students by the count of number of European countries for which they are the most popular destination, 2019.

Country		Frequency
UK		<b>16</b>
Germany		<b>7</b>
Serbia		<b>2</b>
Russia		<b>2</b>
Greece		<b>2</b>
Czech Republic		<b>2</b>
Canada		<b>1</b>
Others		<b>15</b>

Data source: UIS.Stat, July 2022

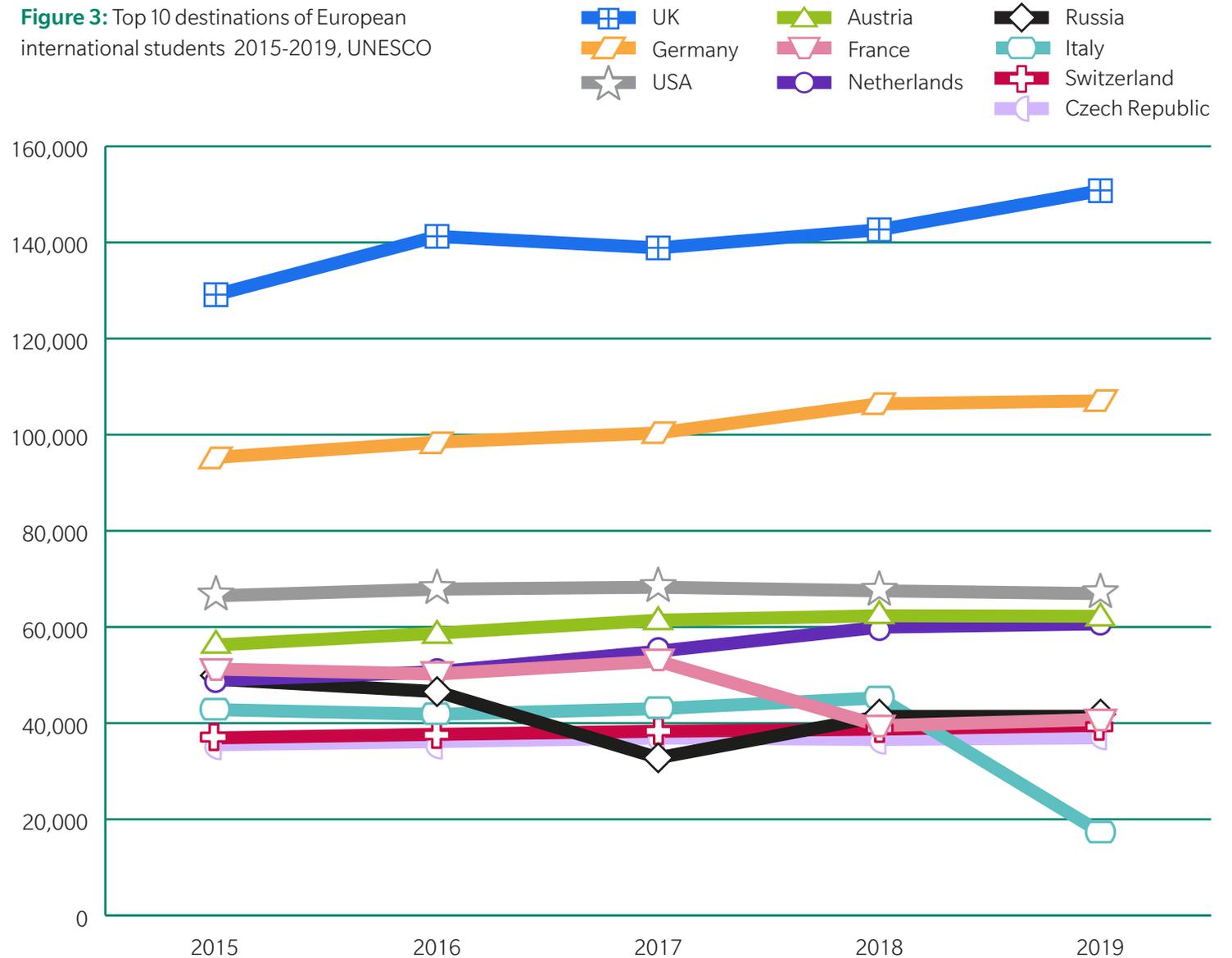
## INTERNATIONAL STUDENT RECRUITMENT FROM EUROPE: THE ROAD TO RECOVERY

The number of European students choosing the UK as a destination grew steadily over the last 10 years of available UNESCO data.

The UNESCO data shows the number of European students in the UK increasing from just over 120,000 in 2010 to a peak of over 150,000 in 2019, which is slightly lower than the comparable HESA data. In 2019, the only other country to attract over 100,000 European students was Germany, at just over 107,000. Meanwhile, the USA is the only other non-European destination to attract more than 30,000 European students a year.

Countries showing strong growth in the number of European students they attract, other than the UK, include Germany, the Netherlands, Poland and Canada, as seen in Figure 3. Outside of the top 10, Turkey has also shown strong growth, up more than 230% in 10 years (Poland also saw a similar level of growth in percentage terms). As the UK's closest competitor, the number of European students choosing Germany has grown 20% over the past five years; the UK's European student population has grown 8% over the same period.

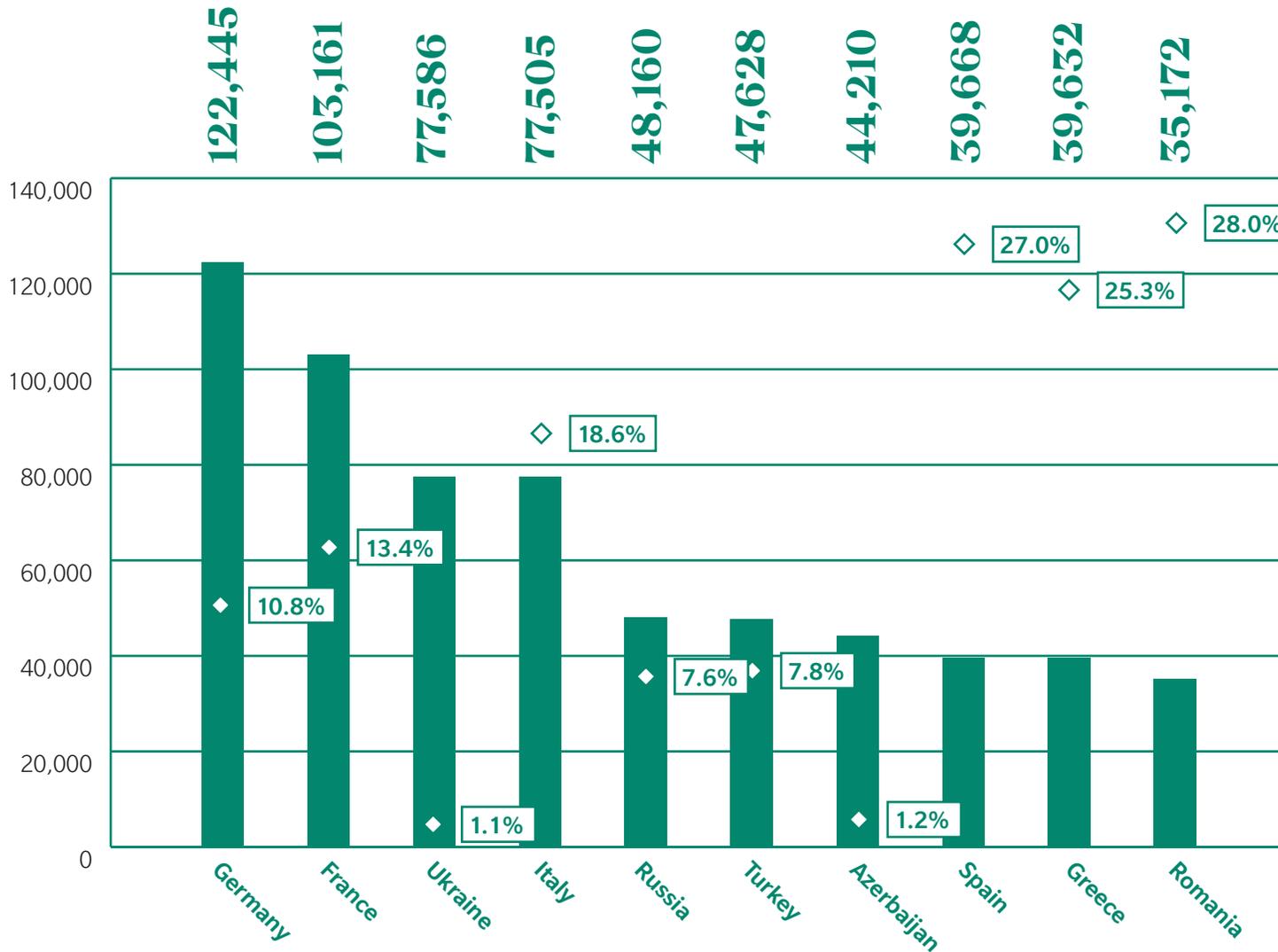
**Figure 3:** Top 10 destinations of European international students 2015-2019, UNESCO



Data source: UIS.Stat, July 2022

**Figure 4:** Top 10 European countries by number of students studying abroad.

◇ percentage of those students who are in the UK, 2019



In 2019, the UK ranked as the top study destination for students from eight out of the top 10 sending countries in Europe (by size of their mobile student population). The UK was the top destination for students from Italy, Spain, Greece and Romania; the second most popular destination for Turkey; and the third most popular destination for students from Germany, France and Russia. As shown in Figure 4, among the top 10 European countries by mobile student population, the UK attracted 28%, 27% and 25% from Romania, Spain, and Greece and was the most popular destination for all three.

The data suggests the importance of linguistic, cultural and historic links in helping to determine student choice. For example, of European nations, Germany, France and Ukraine sent the most students abroad in 2019, and the most popular destinations for students from these countries were Austria, Canada and Poland, respectively.

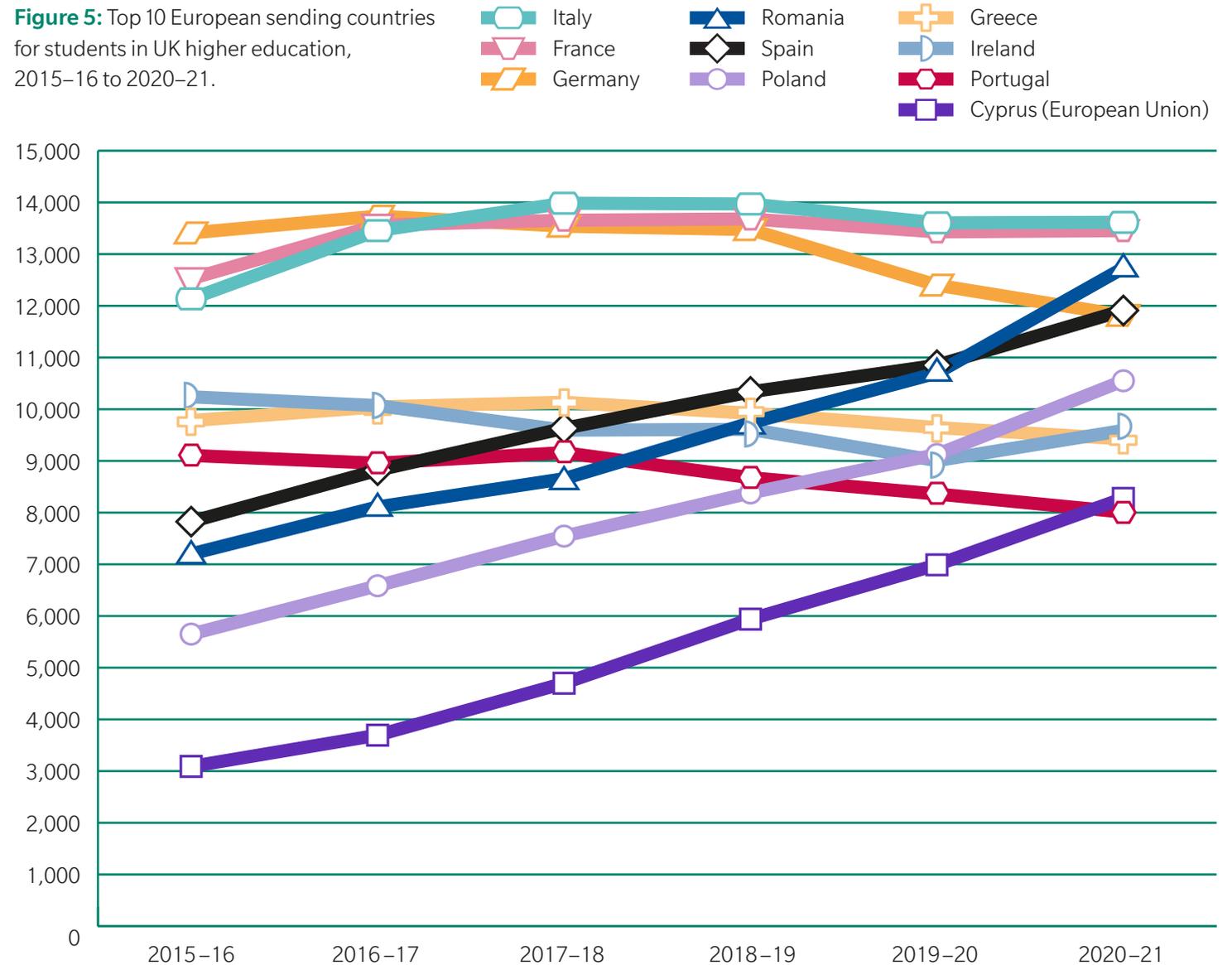
Similarly, the UK attracted a substantial proportion of mobile students from Gibraltar (96%), Malta (68%) and Ireland (63%), and over a third of mobile students from Cyprus (35%) and Poland (34%).

## Where do European students in the UK come from?

Students come from across Europe to study in the UK. Figure 5 shows that among the top 10 European sending countries, Italy and France have been in the top three consistently for the past five years. Germany was in the top three from 2015–16 through to 2019–20 but was overtaken by Spain and Romania taking third and fourth place respectively in 2020–21. Furthermore, the number of German students coming to the UK has fallen each year since 2017–18 driven by declines in the number of postgraduate taught and research students, as can be seen Figures 6 and 7.

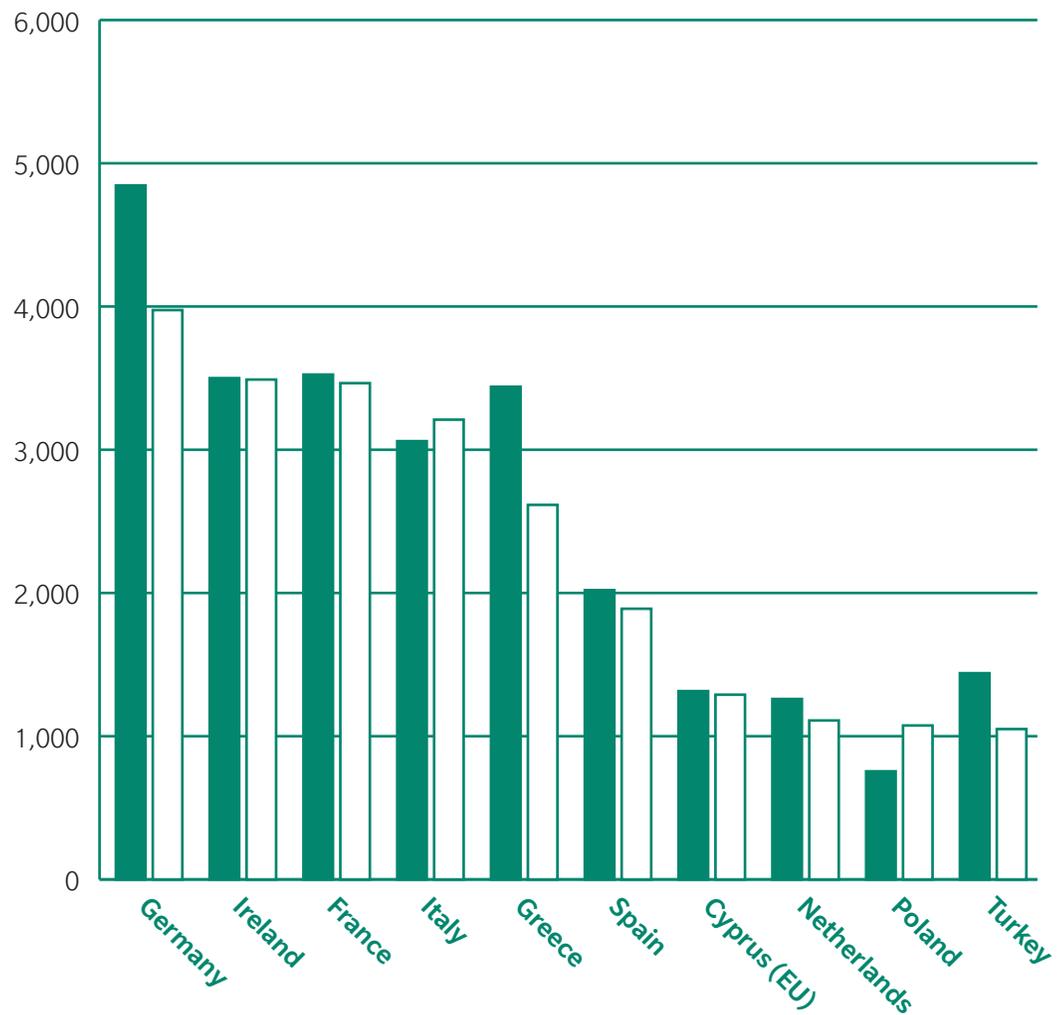
Figure 6 shows that postgraduate research student numbers declined in all 10 of the top 10 sending countries over the five-year period, following the pattern for EU student numbers overall. The picture for postgraduate taught students is more mixed. Numbers from Germany, Spain and Greece declined, and those from Portugal, Romania and Poland grew over the five-year period, as can be seen in Figure 7. Numbers from France declined, seeing some recovery in 2020–21 and numbers from Italy remained largely flat.

**Figure 5:** Top 10 European sending countries for students in UK higher education, 2015–16 to 2020–21.

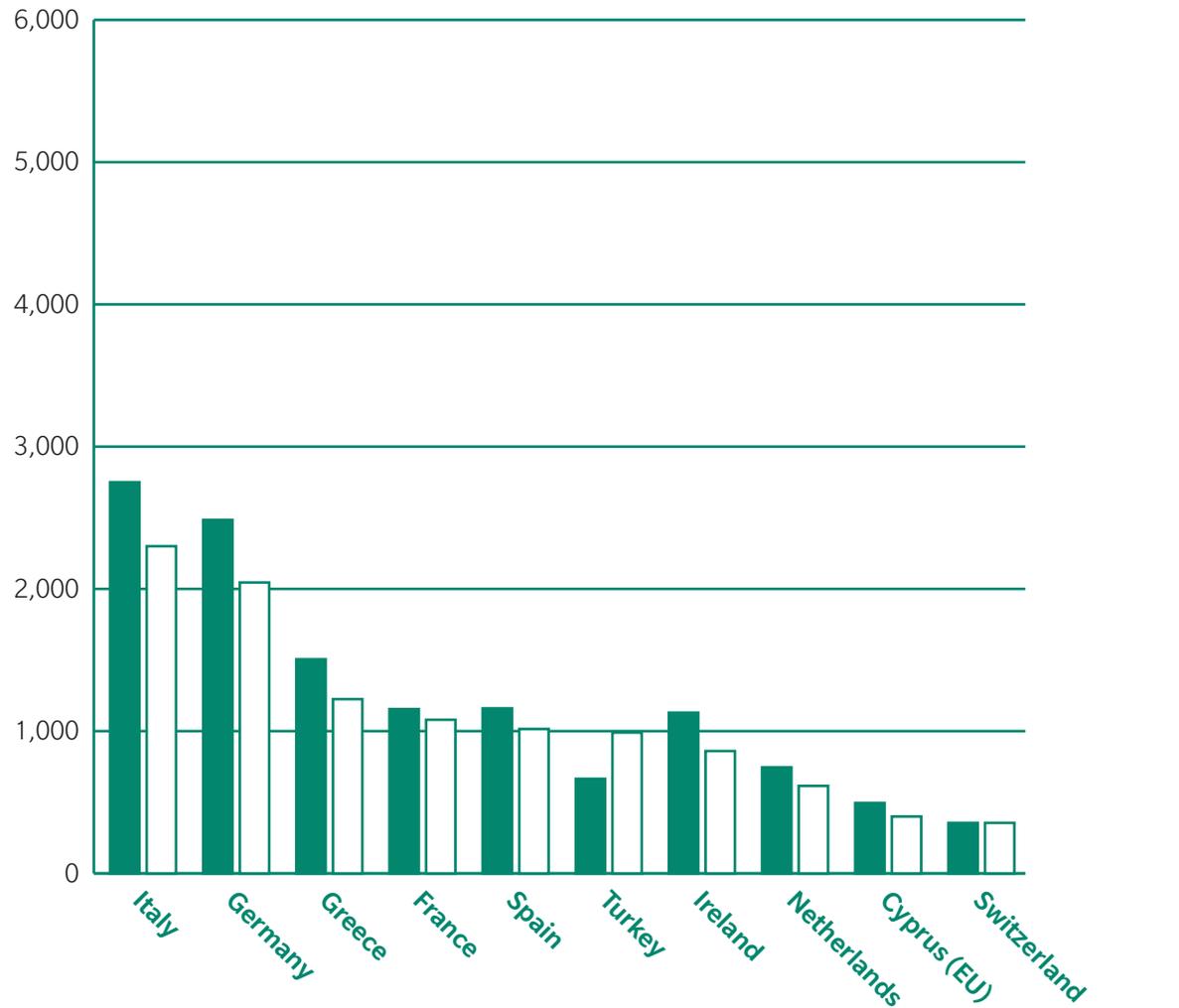


Data source: HESA Student record, multiple years

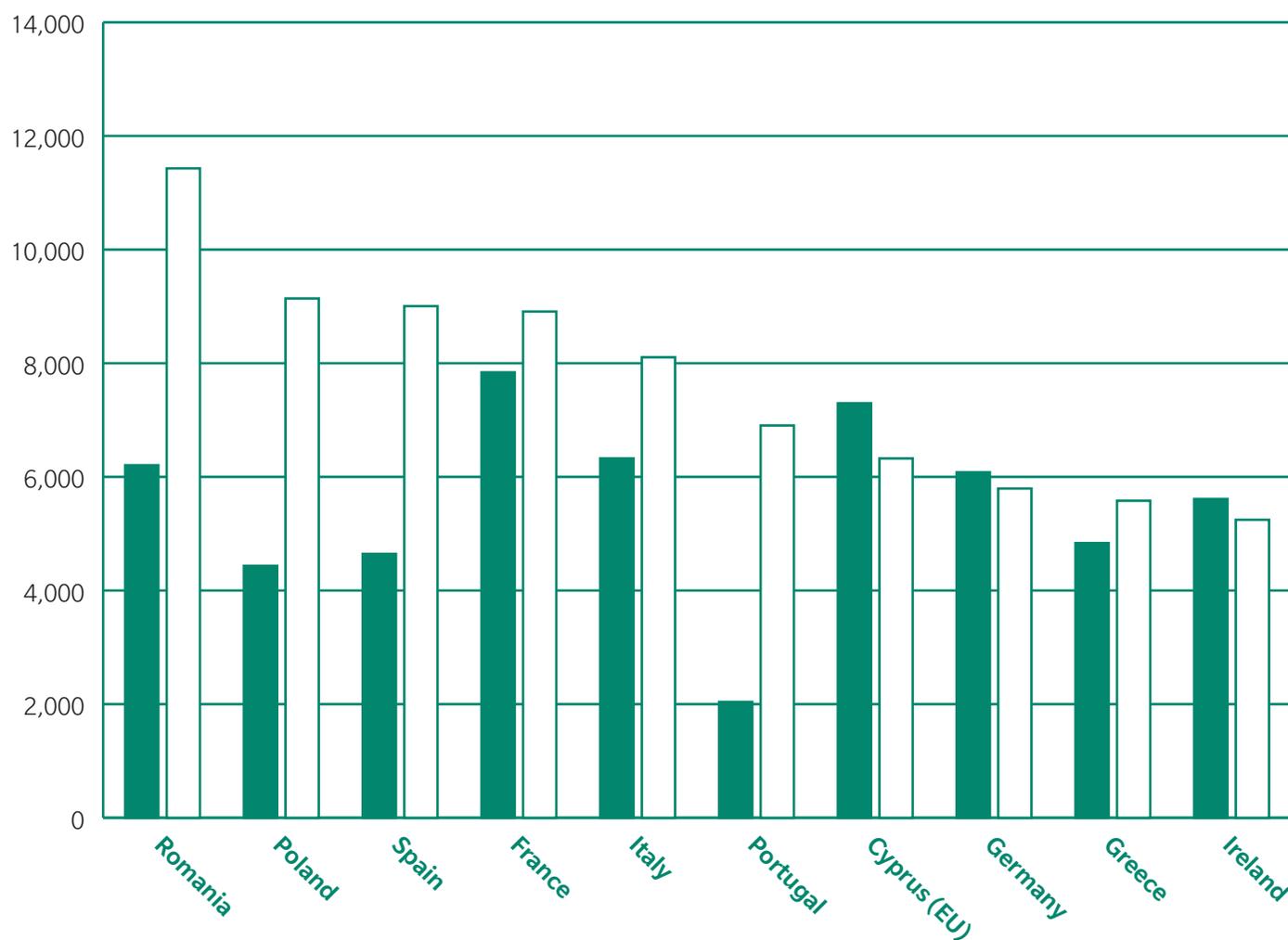
**Figure 6:** Top 10 European sending countries for **Postgraduate taught students** in UK HE, 2015–16 and 2020–21



**Figure 7:** Top 10 European sending countries for **Postgraduate research students** in UK HE, 2015–16 and 2020–21



**Figure 8:** Top 10 European sending countries for undergraduate students in UK higher education, 2015–16 and 2020–21.



Whereas the declines in postgraduates, particularly research students, have driven the effect of overall stagnation or decline in the UK’s three largest markets (Germany, France and Italy), in Southern and Eastern Europe strong growth in taught students, particularly undergraduates, have offset this effect.

Figure 8 demonstrates that the UK’s overall growth in EU student numbers over the period 2016–17 to 2020–21 was therefore driven by strong undergraduate growth, particularly from these five, high-volume, Eastern and Southern European source countries – Greece, Portugal, Spain, Romania and Poland – whose undergraduate numbers collectively increased by 65% over this period, and whose proportional contribution to overall EU undergraduate numbers rose from 24% in 2016–17 to 35% in 2020–21.

Portugal has shown the largest growth over the past five years, sending 124% more students in 2020–21 than in 2016–17, while Poland and Romania grew by 60% and 57%, respectively. Students from these source countries typically show a higher degree of reliance on student loans than their Northern European counterparts, and therefore present a higher risk in relation to the loss of access to home fee status and tuition fee loans from 2021–22 onwards. This may result in the ‘bubble effect’ mentioned in an earlier section becoming apparent in 2021–22, where student numbers from less affluent countries suddenly drop off.

Source: HESA Student Record (FPE), 2022

## INTERNATIONAL STUDENT RECRUITMENT FROM EUROPE: THE ROAD TO RECOVERY

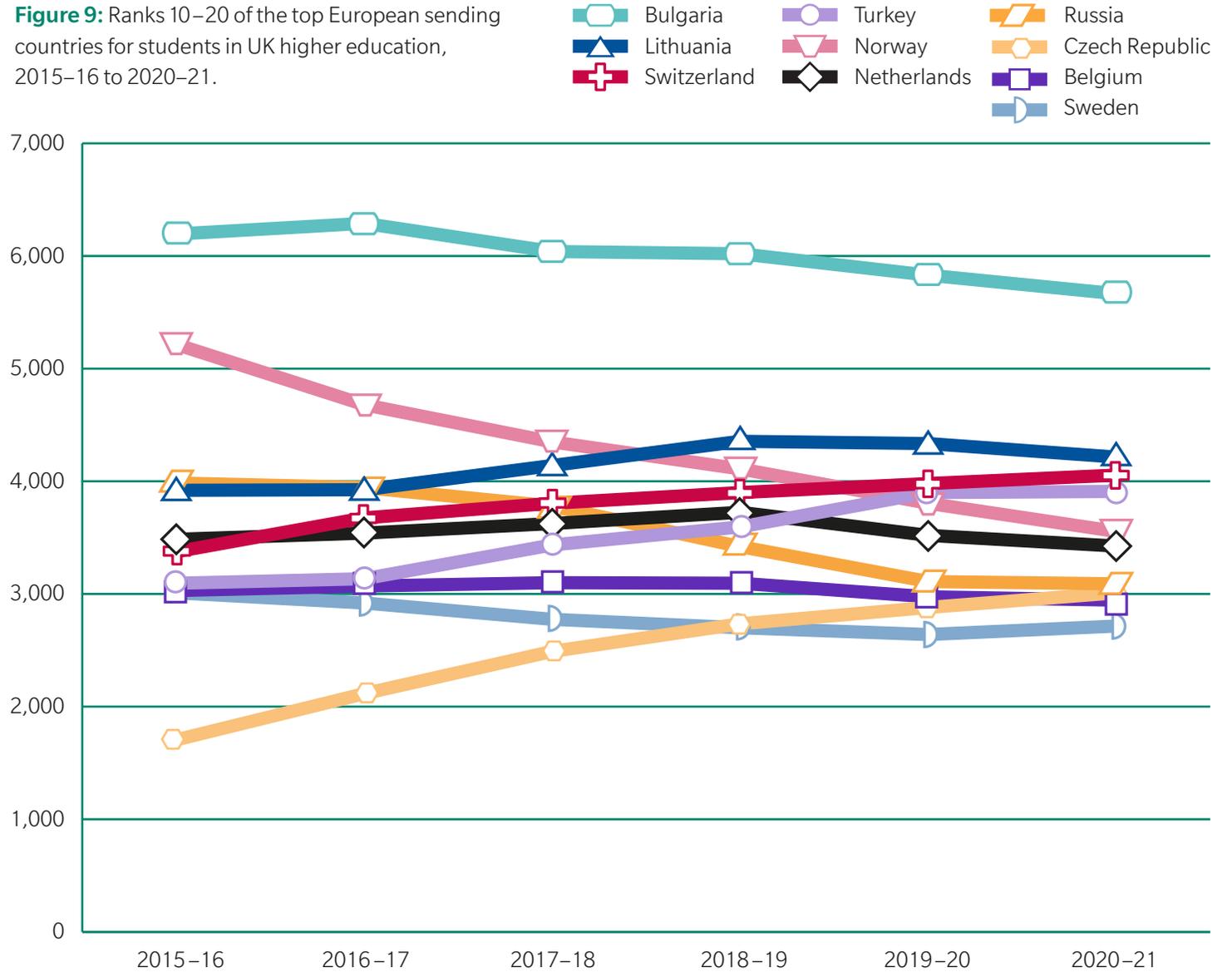
Turning to other key source countries in the top 20, shown in Figure 9, numbers from Bulgaria have been declining year-on-year for the past five academic years, and numbers from Cyprus have been declining for the last three years.

Numbers from Switzerland increased by 10% over the same period, driven by year-on-year growth in undergraduate numbers and stable postgraduate taught and research numbers. Numbers from other, more affluent, countries with lower loan dependence have also declined – for example, students from Belgium, the Netherlands and Sweden have declined by 3%, 4% and 7% respectively – but in the longer term, recruitment from these countries may prove more resilient.

Students from Norway and Turkey have generally been ineligible for home fees and UK student loans and, as such, may be less impacted by changes in student fees and finance. Norwegian student numbers have been declining year-on-year since before the UK's EU referendum result in 2016, driven by year-on-year declines in the numbers of undergraduate and postgraduate taught students, but postgraduate research numbers were 6.6% higher in 2020–21 than in 2016–17.

Among the top 20 European sending countries, Turkey is the only country to have sent more postgraduate research students year-on-year for the past five years. Turkish undergraduate numbers also increased by 72% during this period, while numbers of postgraduate taught students fell in the same period.

**Figure 9:** Ranks 10–20 of the top European sending countries for students in UK higher education, 2015–16 to 2020–21.



Data source: HESA Student record, multiple years

# Impact of the UK's exit from the EU

Following on from the overview of historic trends in European recruitment, we can now turn to examine the more recent impacts of the UK's withdrawal from the EU coming into effect. What impact has Brexit had on demand from European markets so far?

## How many European students apply to study in the UK through UCAS?

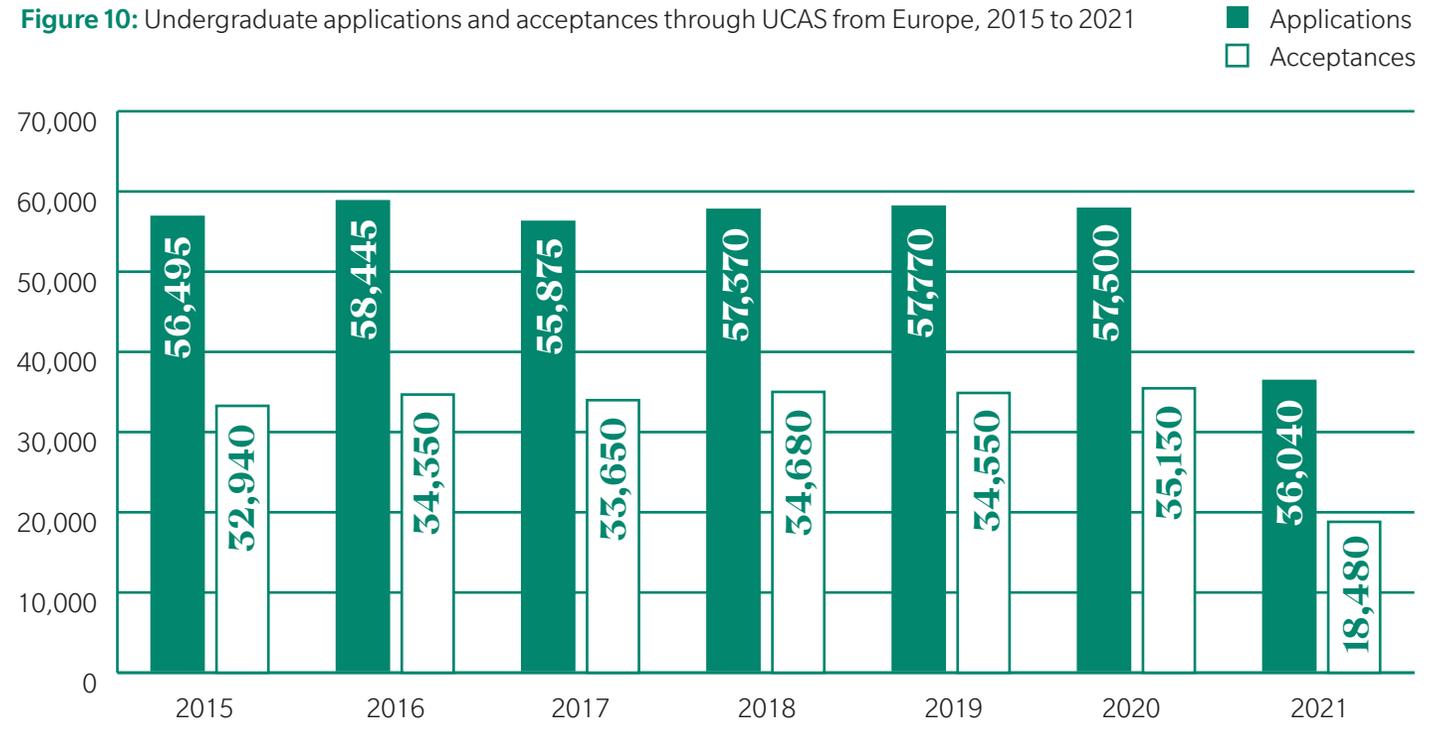
UCAS application and acceptance data is available in-year and can therefore provide us with early insights into the impact the change in fee and immigration status is likely to have on enrolment data for the 2021–22 and 2022–23 academic years.

Figure 10 shows that in 2021, there were 36,040 applications made through UCAS from students in Europe, decreasing by 37% on the previous year. Moreover, only 18,480 students from Europe accepted offers through UCAS, down 47% on the previous year.

The early indications from UCAS's 30 June 2022 deadline application cycle release seem to indicate the trend is continuing, albeit at a slower rate of decline. A total of 23,160 EU students applied via UCAS before the 30 June 2022 deadline, a decrease of 18% on the previous year.

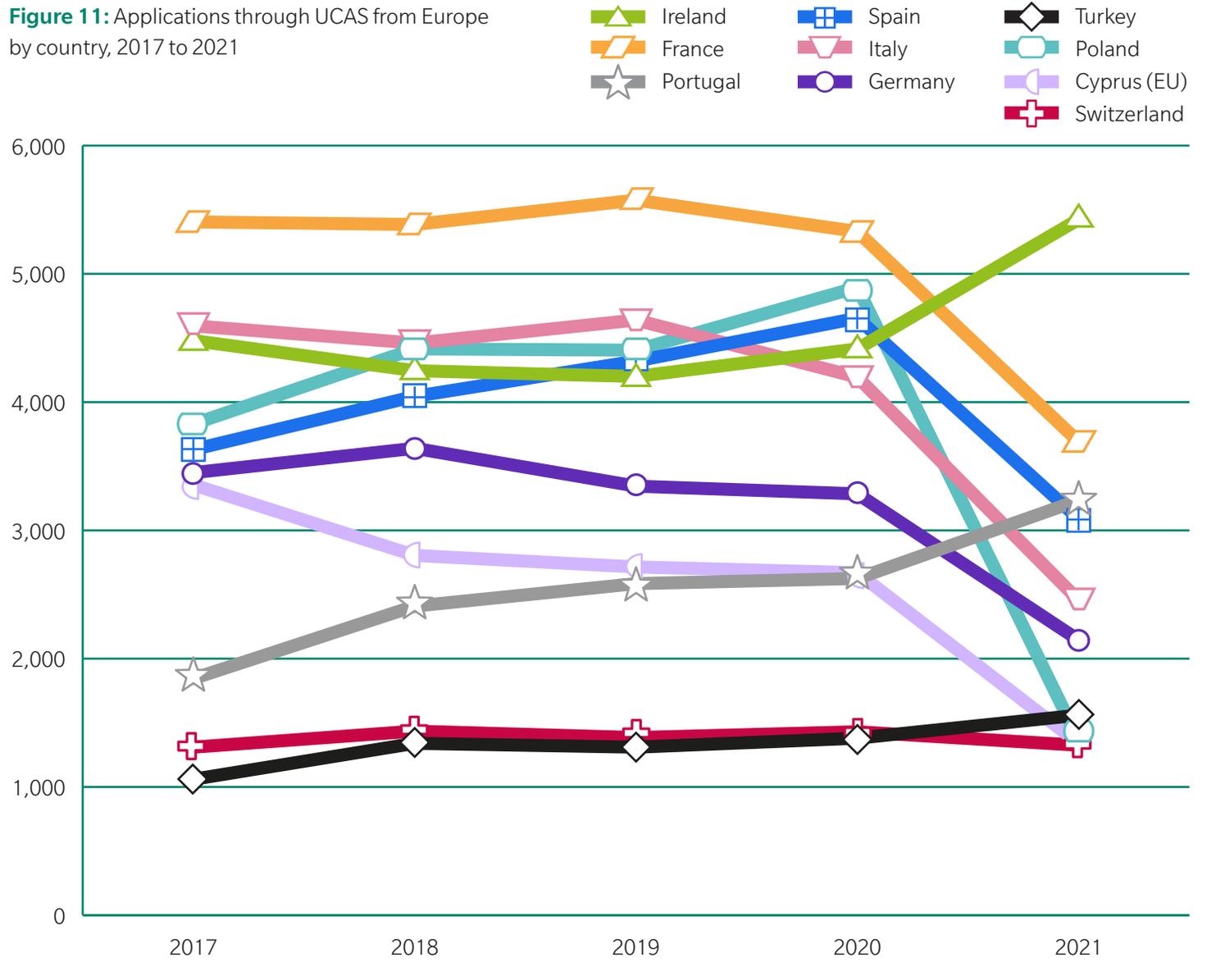
Despite the overall drop in applications and acceptances from 2020 to 2021, the picture at the individual country level is slightly more mixed. Figure 11 demonstrates that Ireland has become the leading source of applications, up 23% from 2020 to 2021, while Portugal has also seen a 23% jump in applications in the same period, continuing a long-term growth trajectory. From a relatively low baseline, Turkey has also emerged as a top 10 country for applications, growing by 13% in the last year.

**Figure 10:** Undergraduate applications and acceptances through UCAS from Europe, 2015 to 2021



Data source: UCAS Undergraduate sector-level end of cycle, 2021

**Figure 11:** Applications through UCAS from Europe by country, 2017 to 2021



Data source: UCAS Undergraduate Sector-level end of cycle, 2021

Figure 12 further shows that Portugal, Ireland and Turkey were also some of the few to see an increase in acceptances from 2020 to 2021, with the number of Portuguese applications translating into acceptances up by 43% in this period.

These countries were outliers, as almost all other European countries have seen decreases in both the number of applications and the number of acceptances through UCAS from 2020 to 2021. The countries among the top 10 with the most significant drops in applications include Poland (-72%), Cyprus (-50%) and Italy (-41%). Drops of more than 30% from France, Spain and Germany are also cause for concern.

The drop in acceptances from most countries has been even more stark. Of the top 10 countries by acceptances in 2021, more than half saw drops of at least 50% from 2020 to 2021 including Spain, Italy, Germany, Cyprus, and Greece. The trend is even more pronounced for Eastern European countries outside the top 10, such as Poland (-80%), Romania (-81%), Lithuania (-74%), and Bulgaria (-81%) all seeing dramatic fall offs in acceptances from the year before.

  **23%**  
**Ireland has become the leading source of applications from 2020 to 2021**

## INTERNATIONAL STUDENT RECRUITMENT FROM EUROPE: THE ROAD TO RECOVERY

It is not just absolute numbers of acceptances that are down: the proportion of EU applications being accepted has dropped, from 61% in 2020 to 51% in 2021 (Figure 10). This decline in acceptance rate is particularly marked in Romania (down from 71% to 46%), Hungary (64% to 42%), Bulgaria (70% to 48%), Poland (60% to 42%) and Spain (64% to 48%).

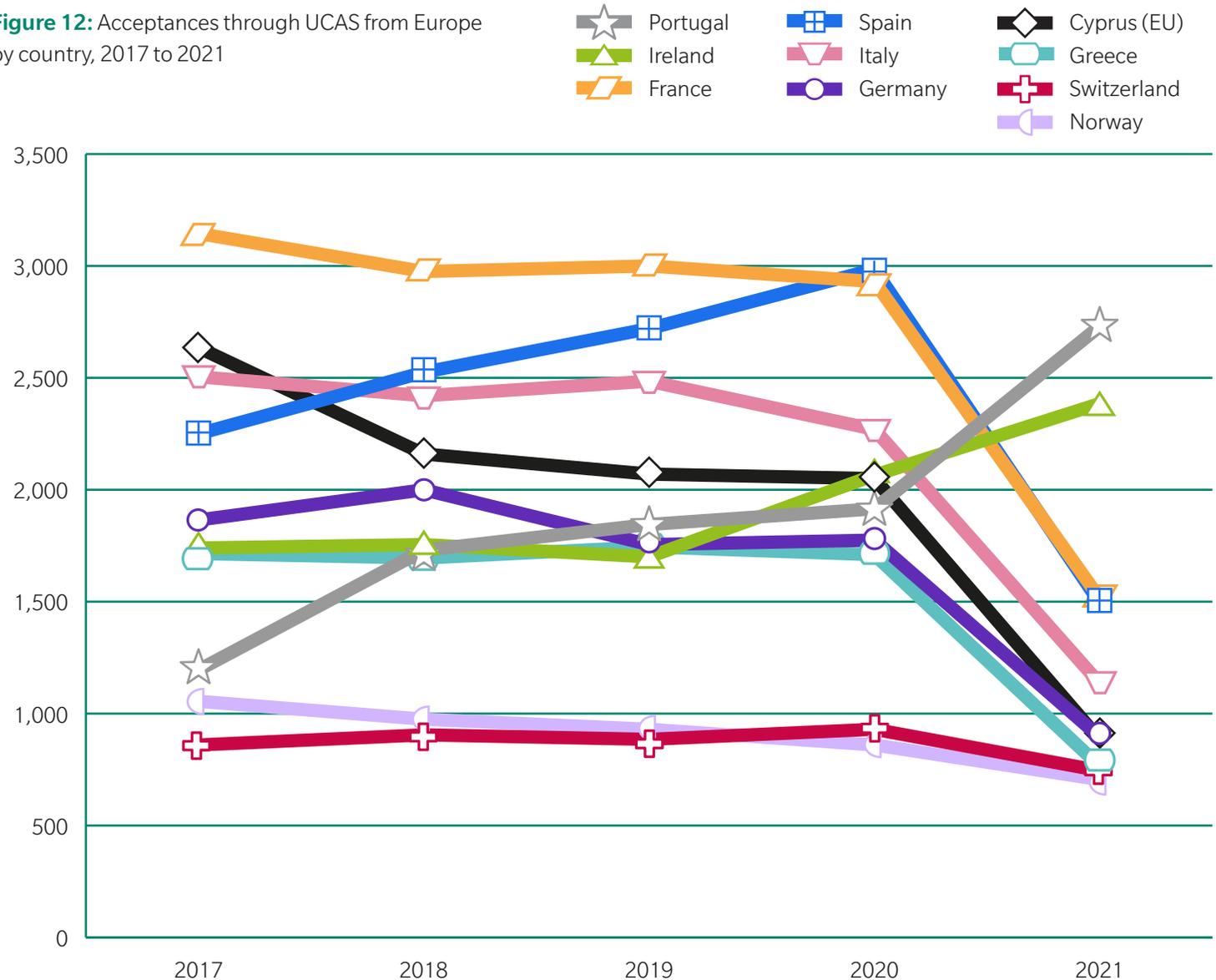
In 2021, among the top 20 countries for total UCAS applications, students from Portugal (84% acceptance rate), Cyprus (66% acceptance rate) and Russia (66% acceptance rate) were most likely to translate their applications into acceptances.

UCAS data for acceptances maps quite closely to first-year undergraduate enrolment data for HESA the following year, as only a small proportion of European undergraduates apply through different channels.

This suggests that we are likely to see a close to 50% decrease in first-year undergraduate student numbers from EU countries in the 2021–22 academic year.

The data also suggests the drop-off is likely to be more pronounced among Eastern European students. What cannot be inferred from the UCAS data is the likely number of enrolments of first year postgraduates, and the number of non-first year students continuing or extending their studies in the UK into the 2021–22 academic year.

**Figure 12:** Acceptances through UCAS from Europe by country, 2017 to 2021



Data source: UCAS Undergraduate Sector-level end of cycle, 2021

## How many European students apply for visas to the UK?

Also released in-year, and newly useful for analysis of European student recruitment patterns, are visa statistics from the Home Office. Prior to 2021, EU and EEA citizens did not need to apply for a visa to study in the UK. As such, we only have a single year's visa data to analyse, presented in Figure 13 – it does however provide a useful lead-indicator ahead of the publication of the HESA data relating to 2021–22.

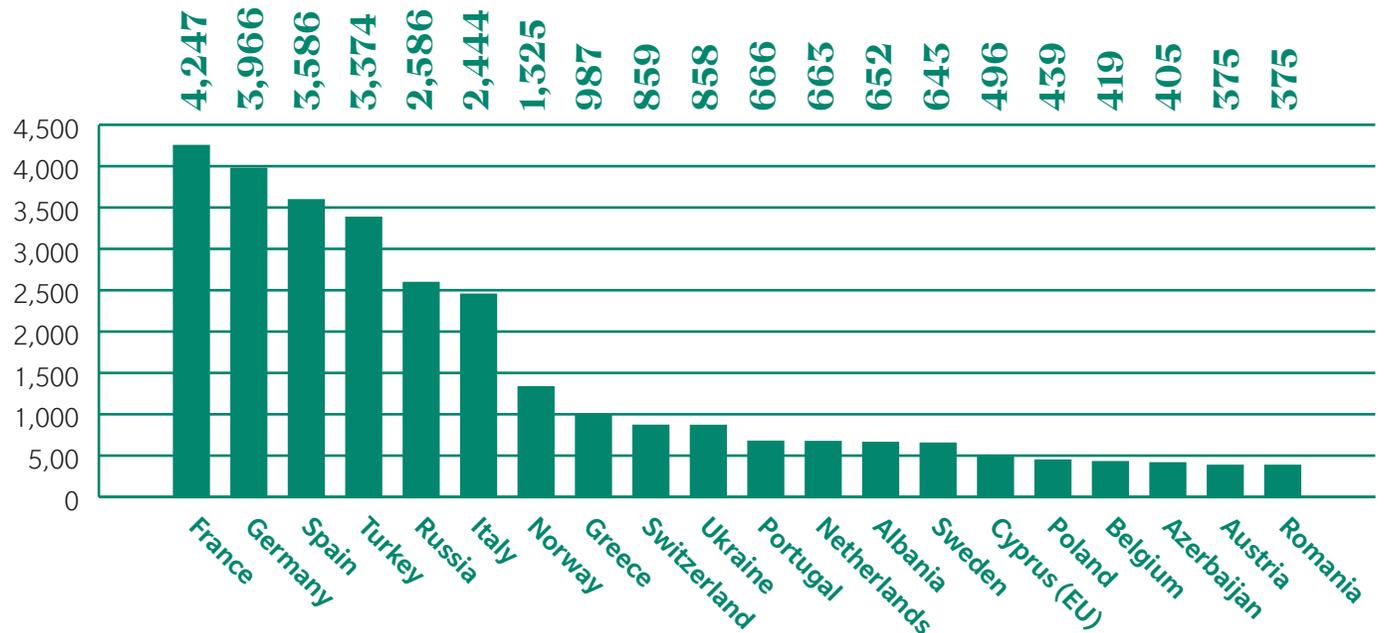
In the year ending March 2022, there were 31,996 sponsored study visas granted to main applicants and their dependants from Europe. This is 416% (+25,798) more than the year ending March 2021, where 6,198 sponsored study visas were granted. This significant jump is to be expected, as this year represents the first full year where study visas have been necessary for new enrolments from EU and EEA countries.

In the year ending March 2022 there were a total of 23,395 sponsored study visa grants to EEA and Swiss students, representing 5% of the total number of overseas student visas issued in this period.

Figure 13 shows that among EEA and Swiss nationals, French students had the highest number of sponsored study grants (4,247, 18% of EEA + Switzerland, 13% of all Europe), followed by students from Germany (3,966, 17% of EEA + Switzerland, 12% of all Europe) and Spain (3,586, 11% of EEA + Switzerland, 13% of all Europe). French, German and Spanish nationals accounted for 50% of all EEA and Swiss grants to study in the year ending March 2022.

Among non-EEA or Swiss nationals, Turkish students had the highest number of sponsored study grants (3,374, +83%), followed by students from Russia (2,587, +22%) and Ukraine (858, +16%). The number of sponsored study grants awarded to Turkey showed considerable growth on the previous year, making this the fourth largest nationality group from the whole of Europe last year.

**Figure 13:** Sponsored UK study visa grants for students from countries in Europe, year ending March 2022



Data source: Home Office Immigration Statistics, year ending March 2022

## Recent trends in student interest from EU/EEA students to the UK and elsewhere, 2019–2022

To fully round out our understanding of the recent impact of the completion of the UK's exit from the EU on the recruitment of European students, we can turn to the Studyportals student search interest dataset. This data allows us to analyse millions of aggregated page views from students, in this case from EU/EEA countries, to see which types of programmes – and what level of study, and which destination countries – are attracting the most interest. This allows us to better understand how interest in the UK has changed over the past three years, and what alternative destinations European students are considering.

The data in Figure 14 shows that EU/EEA student interest in the UK has dropped significantly over the last three years.

Measured using page views for courses at UK universities on Studyportals websites, EU student interest fell by 28% from June 2019 to May 2022.

**Figure 14:** Page views (student interest) of UK courses on studyportals webpages by European students, June 2019 to May 2022



For context, total search activity by EU/EEA students increased by 31% during this same period, indicating the UK's market share is now a smaller slice of a larger pie. It is difficult to disentangle the dual effects of the UK's departure from the European Union, which came into effect on 31 January 2020, and the global lockdowns and travel restrictions precipitated by the Covid-19 pandemic from March 2020 onwards.

Student interest in the UK fluctuated in the range of 40,000 to 50,000 page views a month until early 2021, when it began to drop abruptly to a low of just over 21,000 in July 2021.

This drop-off may be attributed to the UK government's announcement of new fee and visa requirements for EU/EEA students in late June 2020 beginning to filter through to prospective students considering applying to UK courses in 2021–22 January admission intake and beyond.

There has been a degree of recovery and stabilisation since this nadir in July 2021, as page views have remained in the high 20,000s and low 30,000s. It is, however, difficult to ascertain whether this represents a 'new normal' for the level of European student interest in the UK, or whether further fluctuations are likely.

Over this same period, student recruitment from non-European markets has seen a significant increase, evidenced most notably by the UK surpassing its 600,000 international student enrolment target, as set out in the UK government's International Education Strategy (IES), almost a decade ahead of schedule.

The UK Graduate Route, announced in 2019 and formally introduced in 2021, has been widely credited for a significant share of this growth and for the early achievement of the target – an intended aim for the Graduate Route<sup>2</sup> – in addition to enabling British businesses to attract a wider pool of global talent and skills to recruit from. The UK's relative openness throughout the pandemic is also understood to have been a contributing factor, rendering the UK more competitive relative to other major study destinations such as Australia, the USA and Canada. However, the decline in interest from EU/EEA students evidenced by the Studyportals data indicates a similar 'boom' effect has not taken place in Europe.

The growth elsewhere has masked the coming drop in EU student recruitment.

Given the importance of diversity in student source countries, in respect to achieving sustainable growth in international student numbers, the overall drop in European student interest should be a cause for concern for the UK sector.

Studyportals research finds that students typically start researching their programme options 6–24 months before enrolment, with an average of 15 months before enrolment. With that in mind, we could extrapolate that the low point for European enrolments is likely to manifest in either the 2022–23 or 2023–24 academic years.

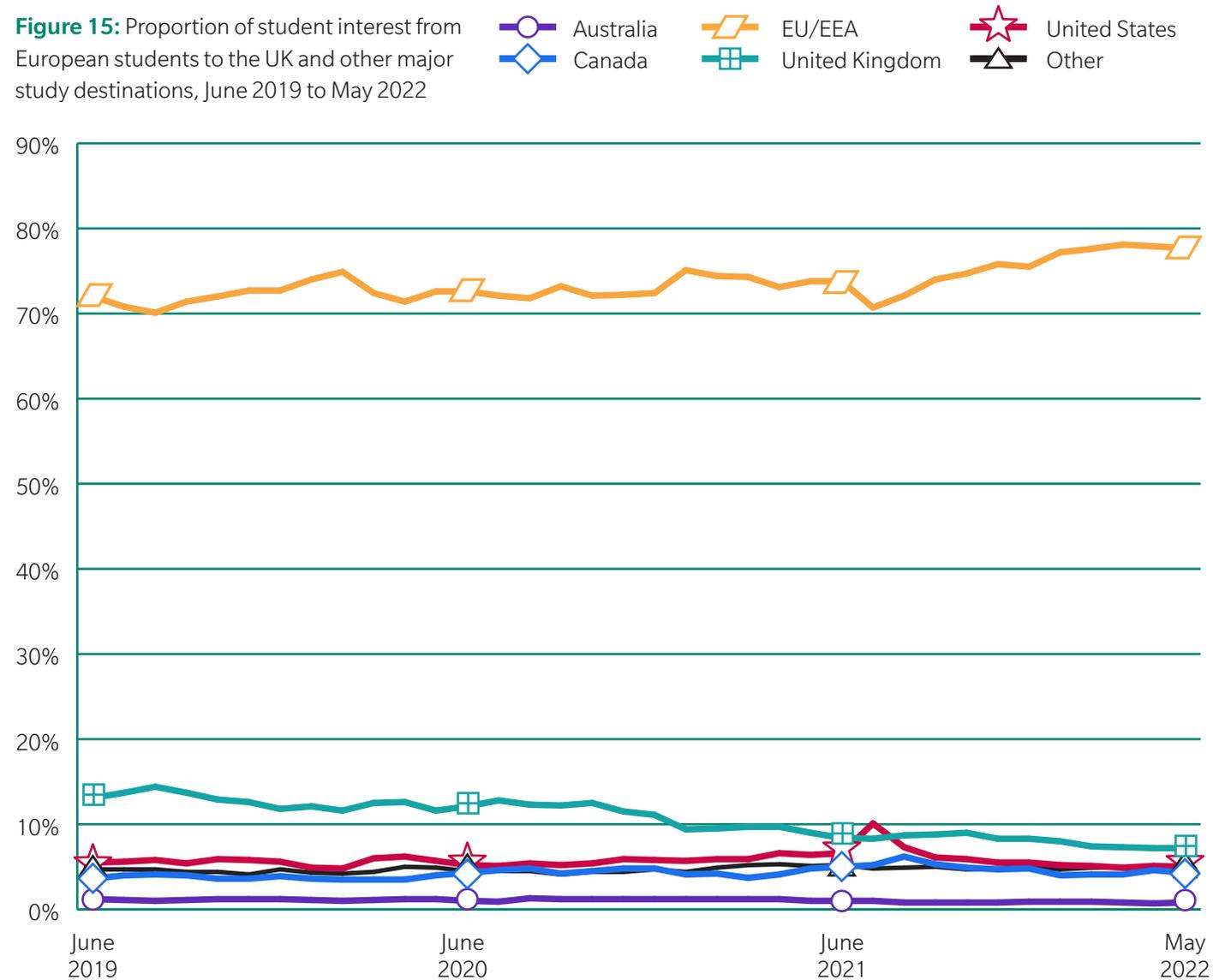
<sup>2</sup> Home Office news story. 'Graduate route to open to international students on 1 July 2021'. Accessed 1 September 2022: <https://www.gov.uk/government/news/graduate-route-to-open-to-international-students-on-1-july-2021>

## What can the UK's position relative to other key destinations for European students tell us about the impact of Brexit?

The largest recipients of EU/EEA student interest are programmes offered in the EEA, which received 70-80% of all page views throughout this period.

Figure 15 shows that the market share of student interest from EEA/EU countries to EEA/EU universities increased by 5.7 percentage points (p.p.) between 2019 and 2022.

**Figure 15:** Proportion of student interest from European students to the UK and other major study destinations, June 2019 to May 2022



## INTERNATIONAL STUDENT RECRUITMENT FROM EUROPE: THE ROAD TO RECOVERY

The UK's market share for EU/EEA student interest has also declined from 2019 to now. The UK previously captured around one in seven student searches; this has declined to around one in 13, a 5.9 p.p. decrease from June 2019 to May 2022, as shown in Figure 16.

The Studyportals data suggests that student interest in the UK has been redistributed mostly to European or EEA offers, rather than showing a marked shift to other anglophone destinations. It also shows the UK retaining the second largest share of European student interest (after EEA/EU universities) ahead of its key anglophone competitors.

Canada, Australia and the US have been relatively stable in the share of interest they garner from EEA students.<sup>3</sup> Figure 16 demonstrates that Canada's market share increased by 0.7p.p., while Australia's decreased by 0.4 p.p. and the United States also decreased by 0.5p.p..

<sup>3</sup> Aside from the one-month period in July 2021 where there was a temporary spike in non-organic student interest in North American courses as a result of specific marketing activity, the US and Canada have demonstrated a relatively stable share of student interest.

**Figure 16:** Proportion of student interest from European students to the UK and other major study destinations, June 2019 to May 2022

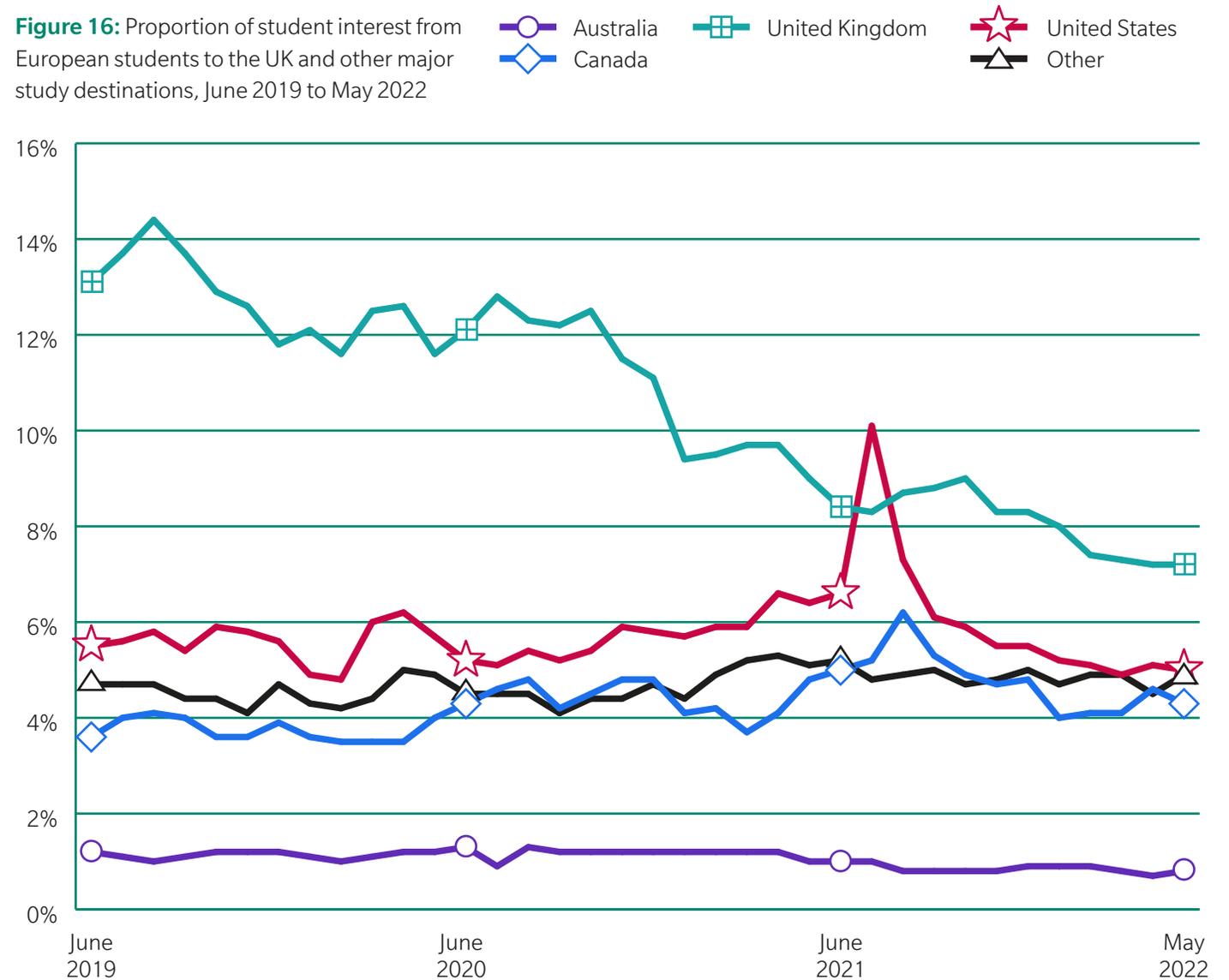


Figure 17 shows that from 2019 to 2020 the redistribution of interest away from the UK began, largely benefitting EU/EEA destinations, but also providing a small windfall to Canadian destinations.

From 2020 to 2021 the redistribution of interest away from the UK accelerated, reflecting the July 2021 nadir in real term interest noted in the previous section. EU/EEA destinations once again benefit the most, but the US, Canada, and other destinations also saw small increases in their share.



**Figure 17:** Year-on-year changes in European student interest share towards the UK, US, Canada, Australia and EU/EEA destinations, 2019 to 2022.

Destination	2020		2021		2022	
EU/EEA	72.7%	+1.0 p.p.	74.1%	+1.4 p.p.	77.7%	+3.6 p.p.
United Kingdom	12.0%	-1.1 p.p.	9.0%	-3.0 p.p.	7.4%	-1.6 p.p.
United States	5.5%	-0.2 p.p.	6.3%	+0.9 p.p.	5.0%	-1.3 p.p.
Other	4.5%	-0.0 p.p.	4.9%	+0.4 p.p.	4.8%	-0.1 p.p.
Canada	4.1%	+0.3 p.p.	4.7%	+0.5 p.p.	4.2%	-0.5 p.p.
Australia	1.2%	+0.0 p.p.	1.0%	-0.2 p.p.	0.8%	-0.2 p.p.
	% share of interest	YoY changes	% share of interest	YoY changes	% share of interest	YoY changes

Data source: Studyportals, July 2022

From 2021 to 2022 the rate of decline in UK market share slowed, but the concentration of interest in EU/EEA destinations accelerated. All anglophone destinations saw year-on-year percentage point drops over this period.

A potential counterpoint is the recent increase in the numbers of Canadian study permits issued to European students, evidenced in the migration statistics published by Immigration, Refugees and Citizenship Canada.<sup>4</sup> The data show that permits issued to students from the European Union grew by 50% (to 37,075), between the years 2019 (which represents the pre-pandemic market position) and 2021, compared with 11% growth in the total number of Canadian study permits issued over the same period. Germany, France and Belgium saw the highest percentage increases suggesting a potential diversion of EU students from Northern Europe away from the UK and towards Canada. Italy also saw a sizeable increase. Permits issued for quarters 1 and 2 of 2022 show a decline on those for 2021 in France, Belgium and Italy, suggesting some post-Covid readjustment. Numbers for Germany continued to increase.

It is too soon to identify whether this is a sustained trend and an effect of the post-Brexit policy changes impacting EU students studying in the UK, and the degree to which a post-Covid spike in student demand, coupled with an underlying growth trajectory in general, may be contributing to these increases. We should also note the size of Canada's baseline share of the Europe market on which these increases are based. This is clearly an area that should be closely monitored in the future.



Photo by Annie Spratt on Unsplash

<sup>4</sup> Migration statistics published by Immigration, Refugees and Citizenship Canada. Accessed 28 August 2022: <https://open.canada.ca/data/en/dataset/90115b00-f9b8-49e8-afa3-b4cff8facaee>

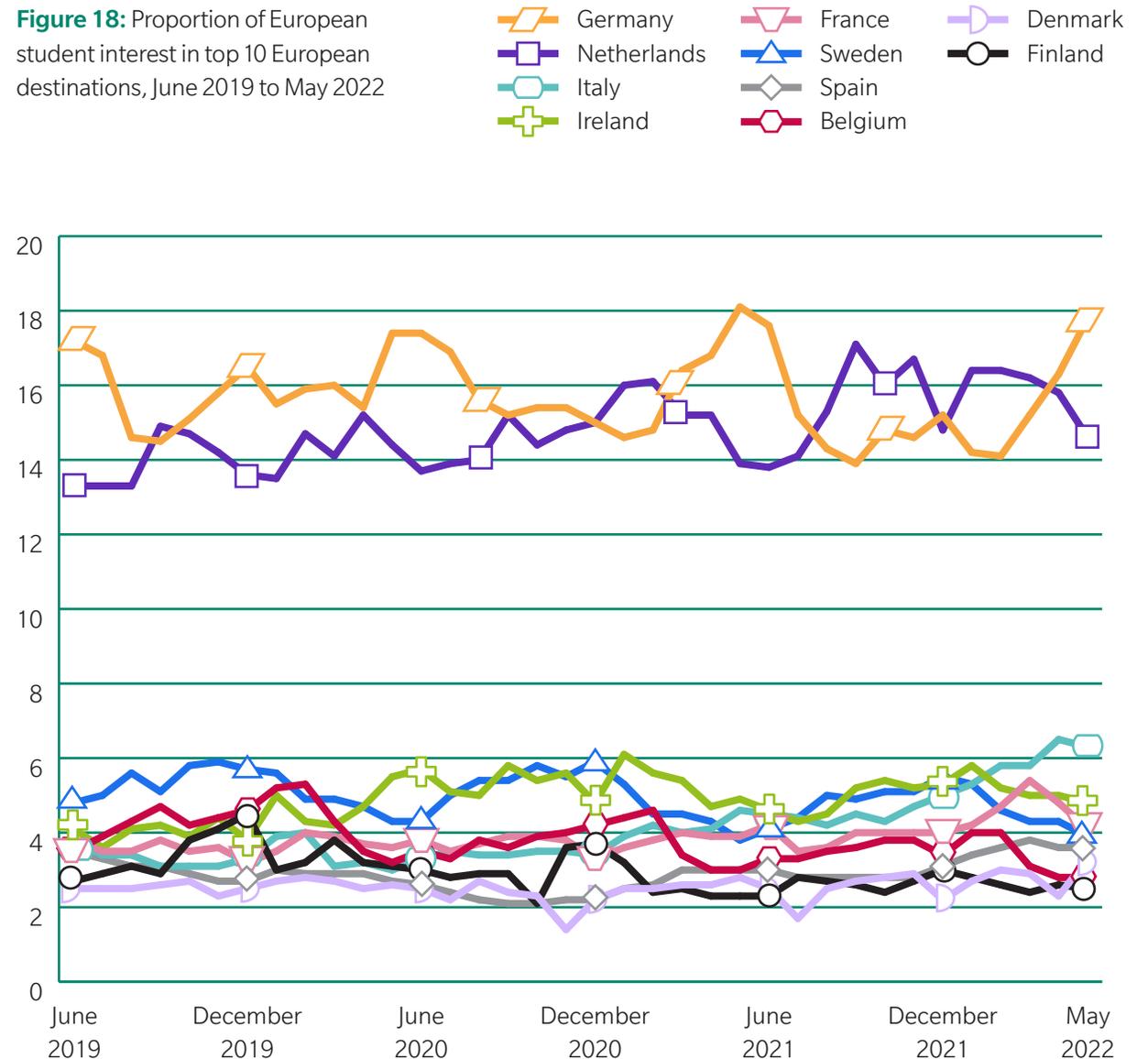
**The low point for  
European enrolments  
is likely to manifest in  
either the 2022–23 or  
2023–24 academic years**

# What's next for internationally mobile European students?

The majority of EU/EEA student interest that is turning away from UK destinations appears to be turning towards EU/EEA countries. Having established that EU/EEA countries as a bloc are the largest market for EU/EEA student interest, we can now use the Studyportals data to understand which countries attract the highest demand and which have benefitted most from the changes in recent years. In turn, these findings can provide valuable insight into the main drivers and influences on European student interest.

As Figure 18 shows, the Netherlands and Germany effectively share the top spot, ahead of other countries by a substantial margin, both attracting over 15% of student interest in 2022.

**Figure 18:** Proportion of European student interest in top 10 European destinations, June 2019 to May 2022



Both have seen fluctuations in their market share, but overall have seen modest increases in the period from 2019 to 2022 (a 0.6p.p. increase for Germany and a 1.3p.p. increase for the Netherlands).

The four next most popular destinations in 2022 attracted between 4–6% of student interest each – Italy 5.9%, Ireland 5.1%, France 4.7% and Sweden 4.4%.

## Market share of European student interest, 2022

**15.9%** Netherlands  
**5.9%** Italy

**15.6%** Germany  
**5.1%** Ireland

**Figure 19:** Changes in European student interest in European study destinations, 2019 to 2022

Destination	2022 share of interest	2019 vs 2022
Netherlands	15.9%	+1.9 p.p.
Germany	15.6%	-0.2 p.p.
Italy	5.9%	+2.6 p.p.
Ireland	5.1%	+1.1 p.p.
France	4.7%	+1.1 p.p.
Sweden	4.4%	-1.0 p.p.
Spain	3.6%	+0.6 p.p.
Denmark	3.3%	-0.9 p.p.
Belgium	2.8%	+0.3 p.p.
Finland	2.6%	-0.9 p.p.
Austria	1.9%	+0.2 p.p.
Portugal	1.9%	+0.9 p.p.
Norway	1.9%	-0.6 p.p.
Switzerland	1.9%	-0.2 p.p.
Poland	1.5%	+0.3 p.p.

Data source: Studyportals, July 2022

Figure 19 shows that from 2019 to 2022, the largest growth of interest was in Italy (in relative terms up 2.4p.p., but also significant in absolute values). Ireland, Germany, the Netherlands and Belgium also saw growth in student interest.

More recent changes from 2021 to 2022 have seen the Nordic countries (Sweden, Denmark, Finland and Norway) attracting less interest. Other destinations have outgrown Nordic countries, while domestic political pressures have led to the reduction of English-medium instruction, most notably in Denmark.

Figure 19 shows that the bulk of growth of interest has mostly been in countries with a large supply of programmes such as the Netherlands, Italy, Ireland and France, but a significant uptick is also noticeable in some smaller countries such as Portugal.

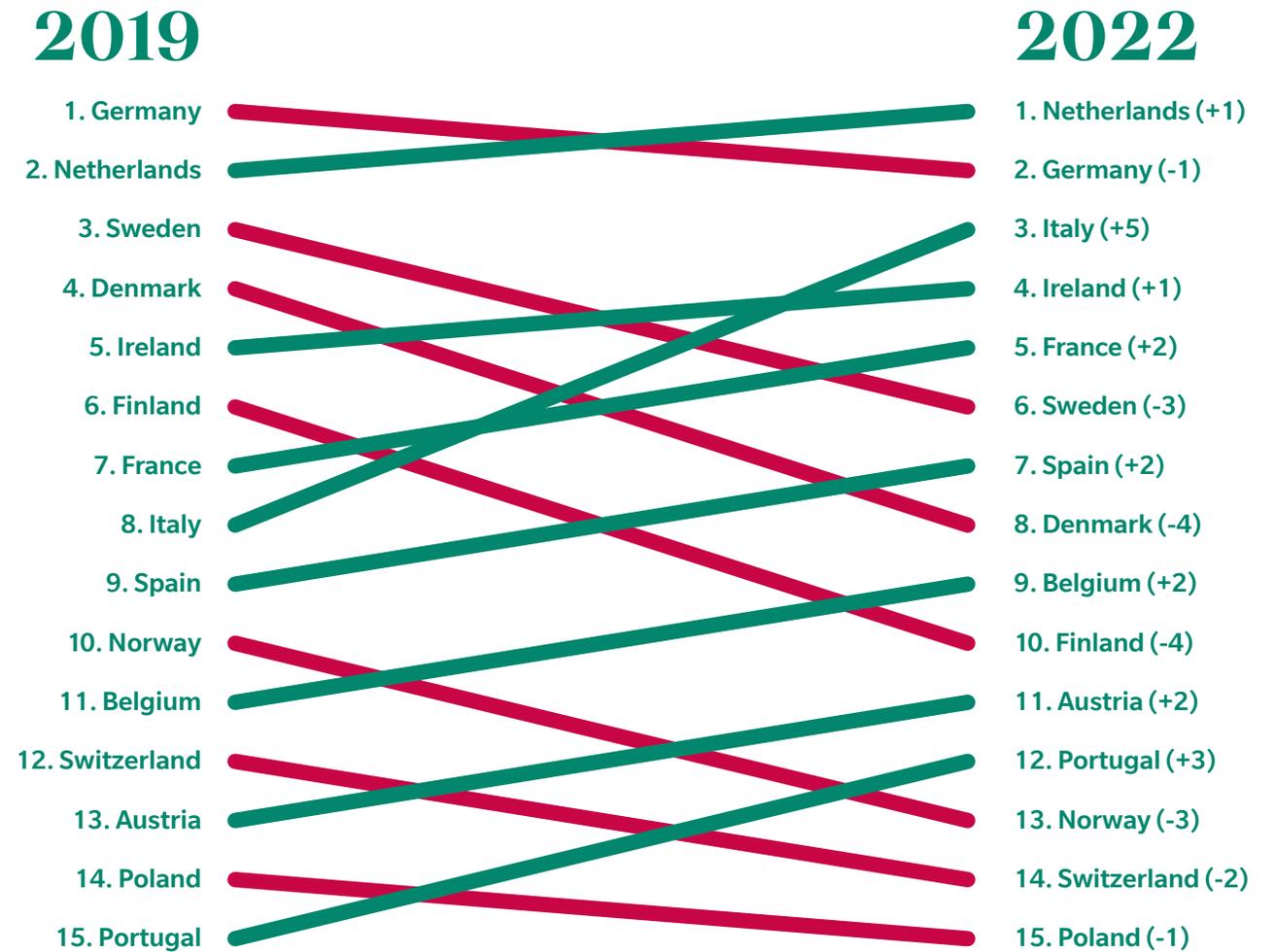
Italy climbed five positions between 2019 and 2022: it is now third among EEA's top 15, as shown in Figure 20.

France, Spain, Belgium, Austria and Portugal all climbed at least two places from their earlier ranking. This has largely come at the expense of the Nordic countries and Switzerland, which all fell at least two places. Sweden and Denmark both fell out of the top five, while Finland and Norway fell out of the top 10.



## Italy up five places in rank of European destinations by European study interest

Figure 20: Top 15 European country destinations by European student interest, change in rank, 2019 to 2022



As seen in Figure 21, these changes have largely been driven by changes in ‘outward demand’ (students from an EU/EEA country looking at courses in other EU/EEA countries) rather than ‘inward demand’ (students from an EU/EEA country looking at courses in their own country).

Poland and Portugal have seen notable increases in their relative rankings in terms of inward demand. Ireland and Italy were, in 2019, largely inward demand driven, but both saw significant rises in demand from other EU/EEA markets by 2022.

## Definitions

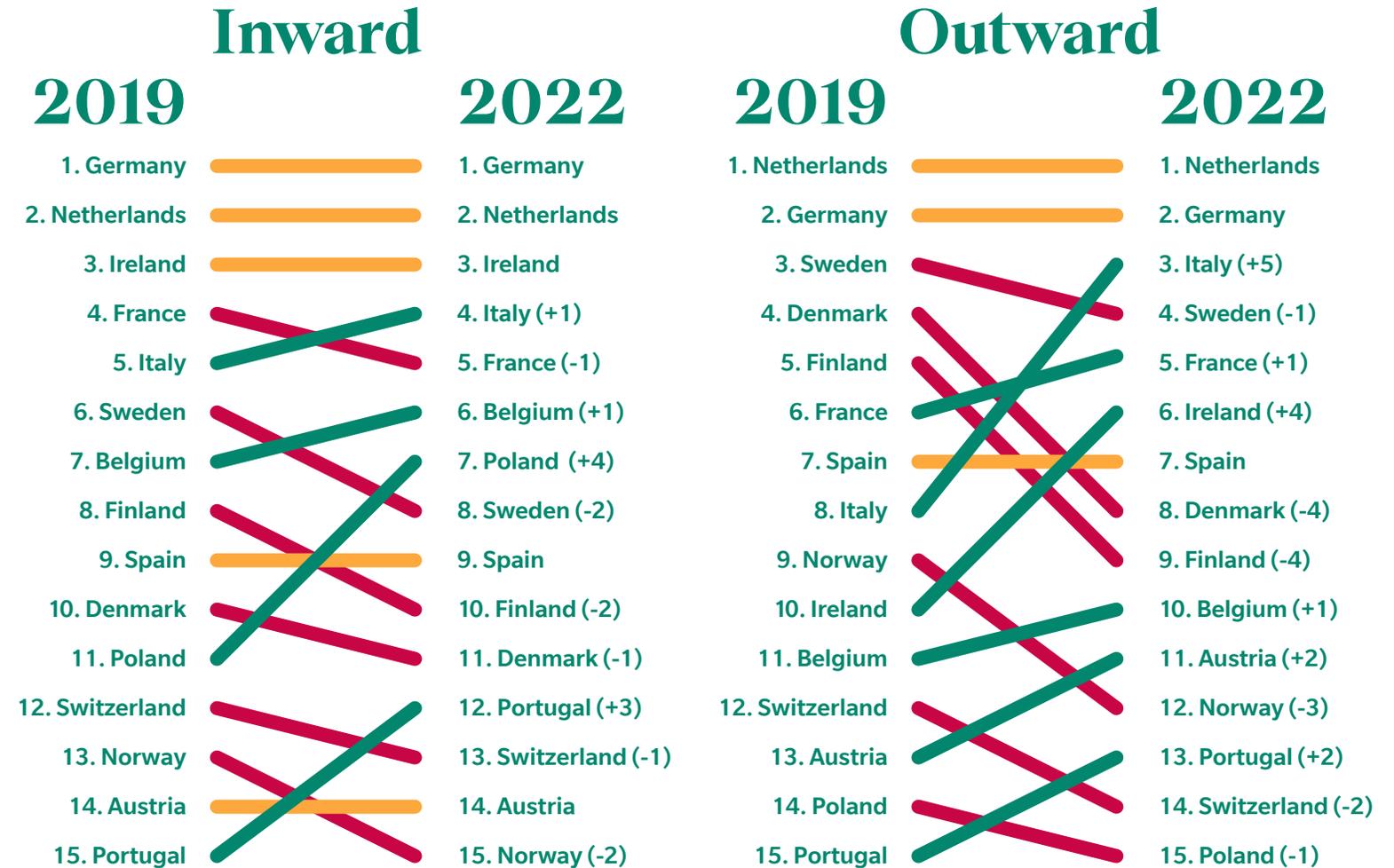
### Inward demand

Students searching for courses in their own country.

### Outward demand

Students from one country searching for courses in other countries.

**Figure 21:** Top 15 European country destinations by European student interest, inward demand and outward demand, change in rank, 2019 to 2022

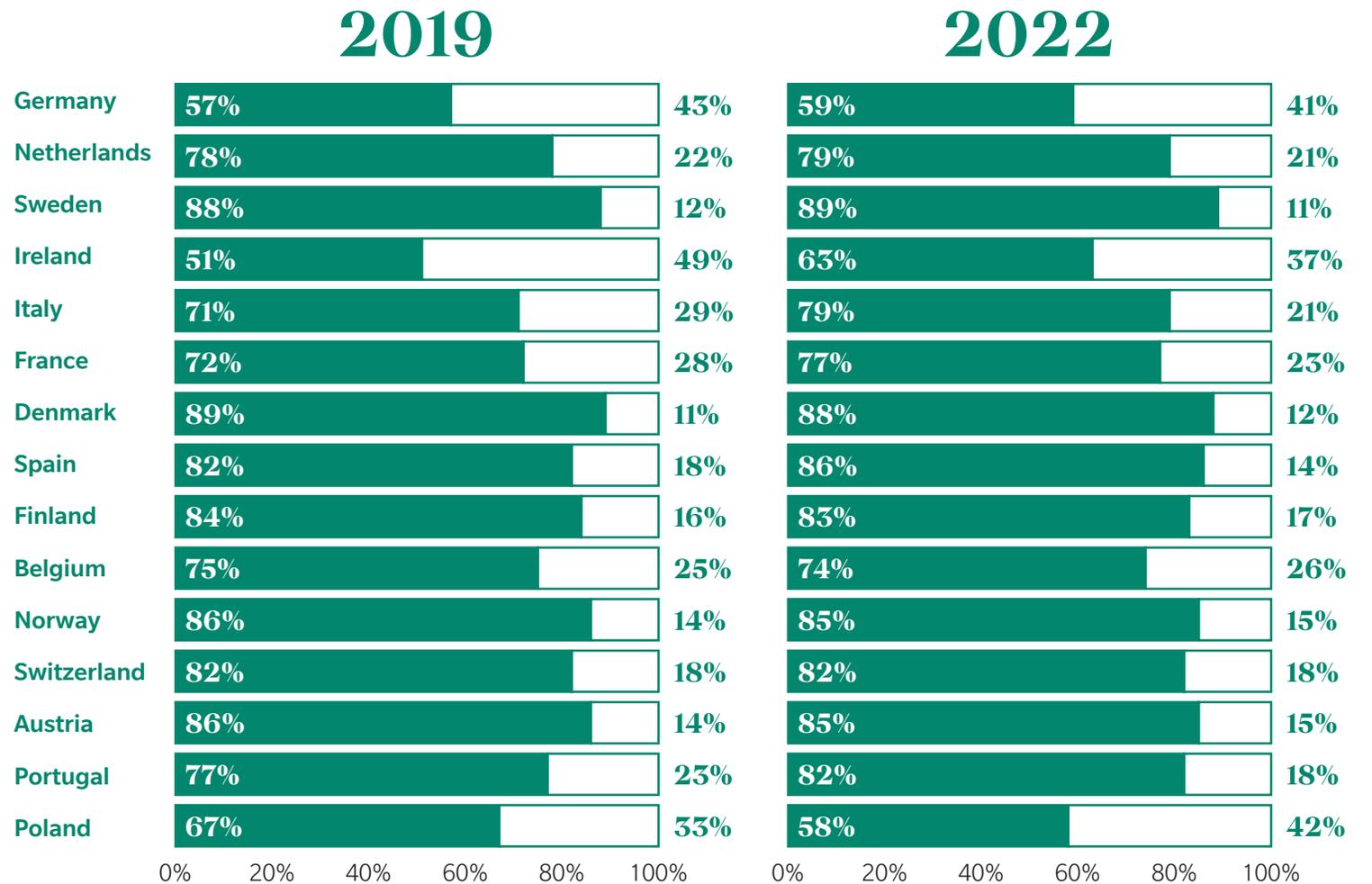


As Figure 22 shows, Poland and Portugal have seen notable increases in their relative rankings in terms of inward demand; however, only Poland has seen a significant rise (+9p.p.) in the proportion of its demand which is inward. This possibly indicates the particular price sensitivity of Polish students but may also reflect the recently growing strength of leading Polish universities in international rankings.

Overall, outward demand still dominates search behaviour on Studyportals. Outward demand accounts for at least 58% of the student interest for all of the top 15 EEA destinations in 2022. This may be due to students using alternative resources to search for courses in their home countries or relying on existing familiarity with their domestic higher education options. However, it might also suggest the encouraging finding that the propensity among European students to travel outside of their home countries to pursue degree studies is resilient, especially in the face of the disruption caused by Covid-19.

**Figure 22:** Inward vs outward share of European student interest by European destination country, comparison of 2019 and 2022

■ Outward demand  
□ Inward demand



Examining student interest from 10 of the most important European countries sending students to the UK reveals some concerning trends. Figure 23 demonstrates that the UK's market share of student interest in both undergraduate and postgraduate courses decreased in all 10 markets from 2019 to 2022.

In 2019, the UK attracted at least a 10.0% share of student interest from eight out of the 10 selected countries at both undergraduate and postgraduate level. By 2022, the UK's market share at postgraduate level had dropped below 10% in all but one country (Switzerland, 12.0%) and to below 8.0% at undergraduate level in all 10.

Outward demand  
accounts for at least  
**58%**  
of the student interest  
for all of the top 15 EEA  
destinations in 2022

**Figure 23:** Undergraduate and postgraduate student interest share from selected European markets to the UK, 2022 with comparison to 2019

Originating country	Undergraduate 2022		Postgraduate 2022	
	Share	Change (p.p.)	Share	Change (p.p.)
Germany	5.3%	-3.1 p.p.	6.3%	-2.3 p.p.
Greece	7.5%	-11.4 p.p.	8.9%	-14.7 p.p.
Netherlands	6.1%	-2.3 p.p.	7.9%	-1.9 p.p.
Italy	5.7%	-5.5 p.p.	8.1%	-8.2 p.p.
France	6.4%	-7.5 p.p.	8.7%	-4.3 p.p.
Spain	6.2%	-9.8 p.p.	8.0%	-7.9 p.p.
Romania	7.7%	-4.6 p.p.	8.6%	-5.0 p.p.
Portugal	6.5%	-8.7 p.p.	8.9%	-7.2 p.p.
Switzerland	7.9%	-8.3 p.p.	12.0%	-4.5 p.p.
Poland	5.7%	-7.2 p.p.	5.4%	-5.5 p.p.

Data source: Studyportals, July 2022

The largest percentage drop at both levels of study was in Greece, dropping 11.4p.p. at undergraduate level and 14.7p.p. at postgraduate level. Italy (-8.2p.p.) and Spain (-7.9p.p.) saw big decreases in interest in UK postgraduate degrees, while Spain also saw a significant drop at undergraduate level (-9.8p.p.), along with Portugal (-8.7p.p.) and Switzerland (-8.3p.p.).

The Netherlands and Germany saw the smallest decreases – of roughly 2–3p.p. – at both levels of study, while the decrease in interest in undergraduate courses from Romanian students was also encouragingly shallow (-4.6p.p.).

We can also explore where search interest from our 10 key European countries that was previously focused on the UK has transferred to.

Figure 24 shows that in the majority of cases student interest largely transferred to EU/EEA destinations. Notable exceptions again were Germany and the Netherlands, where postgraduate search interest diffused almost equally to other anglophone destinations alongside EU/EEA countries.

Combined with the fact Germany and the Netherlands saw more shallow declines in search interest to the UK, the data shows that these markets are both more resilient in demand for UK higher education, while also more likely to be exploring alternative options in anglophone destinations further afield. This may be explained by these countries being relatively wealthier and therefore having more students with the financial resources to select more expensive destinations, as the UK has recently become.



Photo by Toa Hefiba on Unsplash



**The largest percentage drop  
at both levels of study was  
in Greece, dropping 11.4p.p.  
at undergraduate level and  
14.7p.p. at postgraduate level**



**The Netherlands and  
Germany saw the smallest  
decreases – of roughly  
2–3p.p. – at both levels of study**

**Figure 24:** Undergraduate and postgraduate student interest share from selected European markets to the UK and other major destinations, 2022, percentage change comparison with 2019.

Originating country	Destination	Undergraduate		Postgraduate	
		2022	2019	2022	2019
	Australia	0.9%	-0.5 p.p.	0.8%	-0.0 p.p.
	Canada	2.8%	-1.2 p.p.	5.0%	+0.6 p.p.
	EU/EEA	80.6%	+6.3 p.p.	78.3%	+0.6 p.p.
	UK	5.5%	-3.1 p.p.	6.5%	-2.2 p.p.
	US	4.4%	-0.6 p.p.	4.8%	+0.4 p.p.
	Australia	1.1%	-0.6 p.p.	1.0%	-0.2 p.p.
	Canada	3.1%	-0.9 p.p.	5.5%	+0.5 p.p.
	EU/EEA	79.1%	+4.9 p.p.	73.8%	+0.5 p.p.
	UK	6.1%	-2.3 p.p.	7.9%	-1.9 p.p.
	US	4.9%	-0.1 p.p.	6.0%	+0.7 p.p.
	Australia	0.5%	-0.9 p.p.	0.4%	-0.1 p.p.
	Canada	2.0%	-0.8 p.p.	1.4%	-0.1 p.p.
	EU/EEA	81.8%	+15.4 p.p.	82.1%	+15.9 p.p.
	UK	7.5%	-11.4 p.p.	8.9%	-14.7 p.p.
	US	4.5%	-2.2 p.p.	3.9%	-1.6 p.p.
	Australia	0.7%	-1.1 p.p.	1.0%	-0.2 p.p.
	Canada	3.3%	-0.7 p.p.	4.8%	+1.0 p.p.
	EU/EEA	81.7%	+8.5 p.p.	74.3%	+7.4 p.p.
	UK	5.7%	-5.5 p.p.	8.1%	-8.3 p.p.
	US	5.0%	-0.6 p.p.	6.7%	-0.7 p.p.
	Australia	1.1%	-1.2 p.p.	1.1%	-0.2 p.p.
	Canada	5.8%	-1.9 p.p.	8.5%	+1.2 p.p.
	EU/EEA	73.1%	+13.8 p.p.	68.0%	+2.7 p.p.
	UK	6.4%	-7.5 p.p.	8.7%	-4.4 p.p.
	US	5.0%	-4.0 p.p.	6.6%	-0.8 p.p.
	Australia	0.9%	-0.8 p.p.	1.0%	-0.3 p.p.
	Canada	2.7%	-1.0 p.p.	4.0%	+0.7 p.p.
	EU/EEA	79.7%	+12.8 p.p.	74.4%	+6.9 p.p.
	UK	6.2%	-9.8 p.p.	8.0%	-7.8 p.p.
	US	6.4%	-0.5 p.p.	7.6%	+0.0 p.p.
	Australia	0.5%	-0.3 p.p.	0.7%	-0.3 p.p.
	Canada	2.5%	-0.9 p.p.	5.3%	+1.0 p.p.
	EU/EEA	85.3%	+11.9 p.p.	80.2%	+4.7 p.p.
	UK	5.7%	-7.2 p.p.	5.4%	-5.4 p.p.
	US	2.6%	-2.5 p.p.	4.2%	-0.4 p.p.
	Australia	0.5%	-0.3 p.p.	0.8%	-0.3 p.p.
	Canada	1.6%	-1.1 p.p.	5.0%	+1.6 p.p.
	EU/EEA	82.0%	+5.6 p.p.	75.5%	+2.0 p.p.
	UK	7.7%	-4.6 p.p.	8.6%	-5.0 p.p.
	US	4.1%	-0.5 p.p.	5.4%	+0.6 p.p.
	Australia	0.6%	-1.0 p.p.	0.8%	-0.2 p.p.
	Canada	1.5%	-1.9 p.p.	3.7%	+1.5 p.p.
	EU/EEA	84.4%	+13.5 p.p.	78.7%	+7.0 p.p.
	UK	6.5%	-8.7 p.p.	8.9%	-7.2 p.p.
	US	3.9%	-0.9 p.p.	3.9%	-1.1 p.p.
	Australia	1.4%	-1.3 p.p.	1.2%	-0.5 p.p.
	Canada	3.8%	-0.9 p.p.	4.9%	+0.5 p.p.
	EU/EEA	76.4%	+14.2 p.p.	69.3%	+4.5 p.p.
	UK	7.9%	-8.3 p.p.	2.0%	-4.5 p.p.
	US	4.5%	-2.9 p.p.	5.8%	-0.8 p.p.

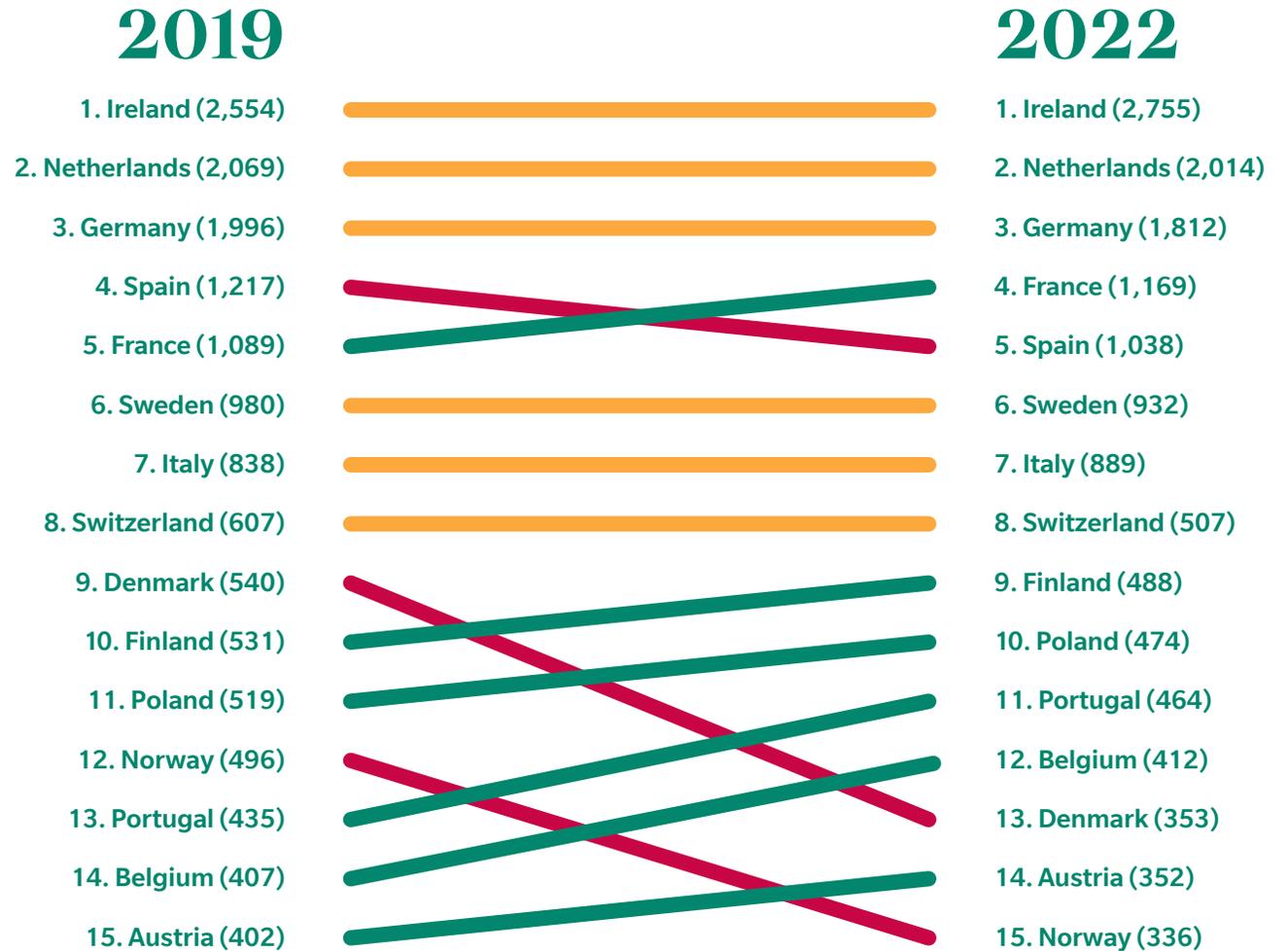
## How many English-medium instruction (EMI) programmes are offered in Europe?

The provision of degrees taught in English has become a hot, and sometimes controversial, topic in European higher education. The number of EMI programmes available online on Studyportals' websites provides a useful proxy for the scale of English language provision in each country. Joint research by Studyportals and the British Council published in December 2021 found that nearly one in five programmes taught in English are now provided outside Australia, Canada, the UK and the US; 63% of these were offered within Europe.

Figure 25 shows that Ireland, the Netherlands, and Germany lead the way, with France and Spain rounding out the top five. Together these five countries account for around 53% of the total EMI programmes in Europe. Ireland and France expanded their provision of English programmes, while the Netherlands, Germany and Spain all cut theirs slightly.

Away from the top five, Italy, Portugal and Belgium all grew their number of programmes, while Switzerland, Poland and Austria cut theirs. The most significant reductions in percentage terms came from the Nordic countries, with Norway decreasing their offer by 32.3% and Denmark reducing theirs by 34.6%.

**Figure 25:** English-medium programmes offered in European countries (listed on studyportals websites), comparison of rank in 2019 and 2022



**Figure 26:** Proportion of total European English-medium programme provision by European country, 2022

Destination	2022 share of interest	2019 vs 2022
Ireland	16.6%	2,755
Netherlands	12.2%	2,014
Germany	10.9%	1,812
France	7.1%	1,169
Spain	6.5%	1,038
Sweden	5.6%	932
Italy	5.4%	889
Switzerland	3.1%	507
Czech Republic	3.0%	493
Finland	2.9%	488
Poland	2.9%	474
Portugal	2.8%	464
Hungary	2.5%	415
Belgium	2.5%	412
Denmark	2.1%	353
Austria	2.1%	352

Data source: Studyportals, July 2022

Figure 26 shows that EMI provision in Europe is concentrated in a handful of Western European countries. Only five countries have more than 1,000 EMI programmes listed on Studyportals, with the medium provision per country at 352 in 2022.

Destination	2022 share of interest	2019 vs 2022
Norway	2.0%	336
Lithuania	1.8%	303
Malta	1.8%	295
Cyprus	1.6%	262
Greece	1.0%	163
Latvia	0.7%	123
Romania	0.6%	92
Slovakia	0.5%	84
Estonia	0.5%	79
Iceland	0.4%	65
Bulgaria	0.4%	64
Luxembourg	0.4%	60
Croatia	0.3%	44
Slovenia	0.2%	33
Liechtenstein	0.0%	3

## What are European students currently studying in the UK and what subjects do they search for when making their decisions?

In 2020–21, business and management, social sciences, and design and creative and performing arts attracted the most international students from Europe, representing the top three choices among undergraduate and postgraduate taught students, as shown in Figure 27.

However, for postgraduate research students, the most common subject areas were engineering and technology, physical sciences, and biological and sport sciences.

Business and management accounted for 21% of all EU-domiciled students studying in the UK in 2020–21 and was the most common subject area for all top 20 European sending countries excluding Ireland and the Netherlands.

Business and management attracted a notable number of students from Romania, 40% of whom studied this subject area in 2020–21.

**Table 2:** Top 3 most popular subject areas for European domiciled students from the top 20 sending countries to the UK, 2020–21

Rank	Domicile (country)	Most popular subject areas			Students studying popular subject	% of total
		Subject 1	Subject 2	Subject 3		
1	Italy	Business and management	Social sciences	Design, creative and performing arts	2,655	19.5
2	France			Engineering and technology	2,660	19.8
3	Romania		Computing	Design, creative and performing arts	5,025	39.5
4	Spain		Engineering and technology	Social sciences	2,285	19.2
5	Germany		Social sciences	Engineering and technology	2,305	19.5
6	Poland		Design, creative and performing arts	Computing	2,170	20.6
7	Ireland	Subjects allied to medicine	Business and management	Social sciences	3,130	32.6
8	Greece	Engineering and technology	1,645		17.5	
9	Portugal	Design, creative and performing arts	1,915		23.1	
10	Cyprus	Business and management	Engineering and technology	Computing	1,670	20.8
11	Bulgaria		Computing	Design, creative and performing arts	1,485	26.2
12	Lithuania		Design, creative and performing arts	Computing	875	20.8
13	Switzerland		Social sciences	Design, creative and performing arts	750	18.5
14	Turkey		Engineering and technology	Social sciences	785	20.1
15	Norway		Social sciences	Design, creative and performing arts	605	17.0
16	Netherlands		Social sciences		Business and management	435
17	Russia		Business and management	Social sciences	855	27.7
18	Czech Republic	Design, creative and performing arts		Social sciences	680	22.6
19	Belgium	Social sciences		Engineering and technology	435	14.8
20	Sweden	Design, creative and performing arts		430	15.8	

Data source: HESA Student record, 2020–21

**Figure 27:** Number of EU-domiciled students in the UK by level of study and subject area, 2020–21 academic year

- Undergraduate
- Postgraduate (research)
- ▨ Postgraduate (taught)

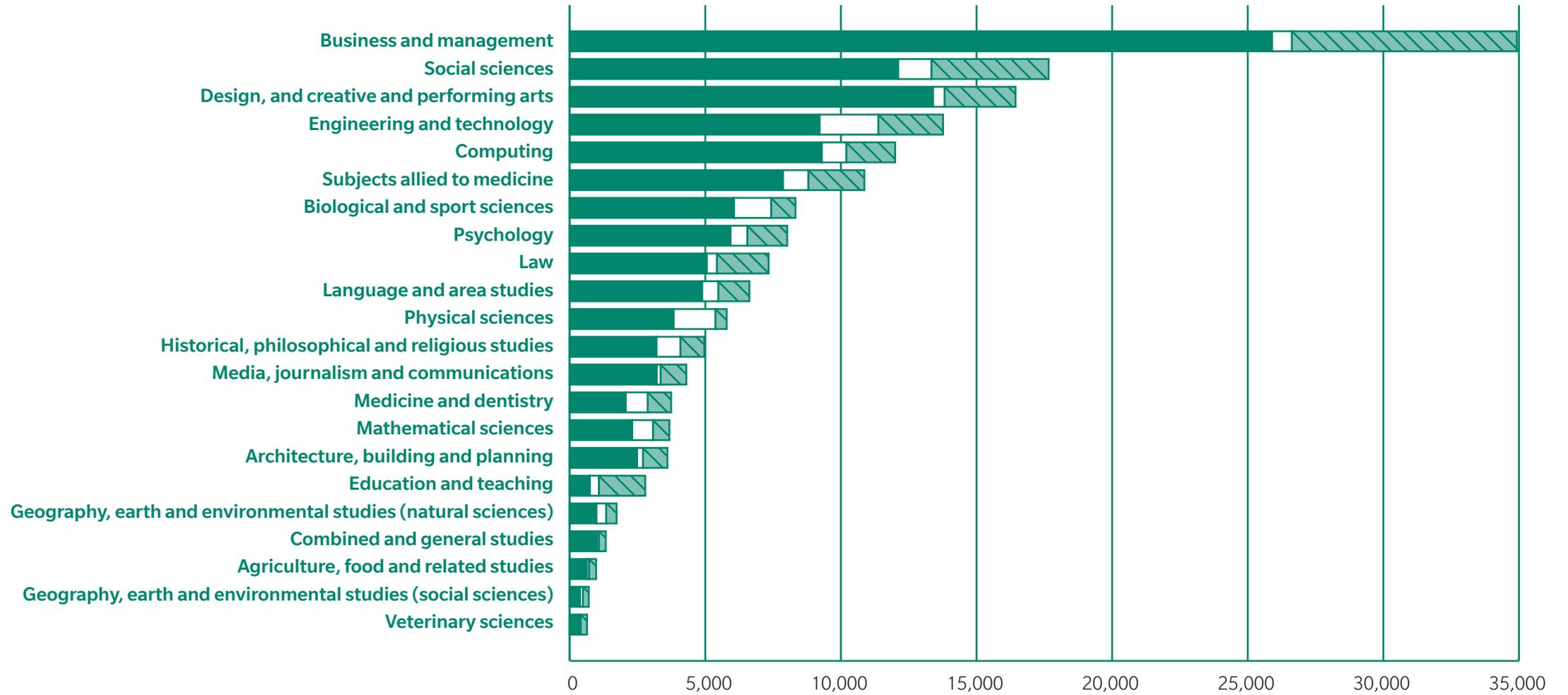


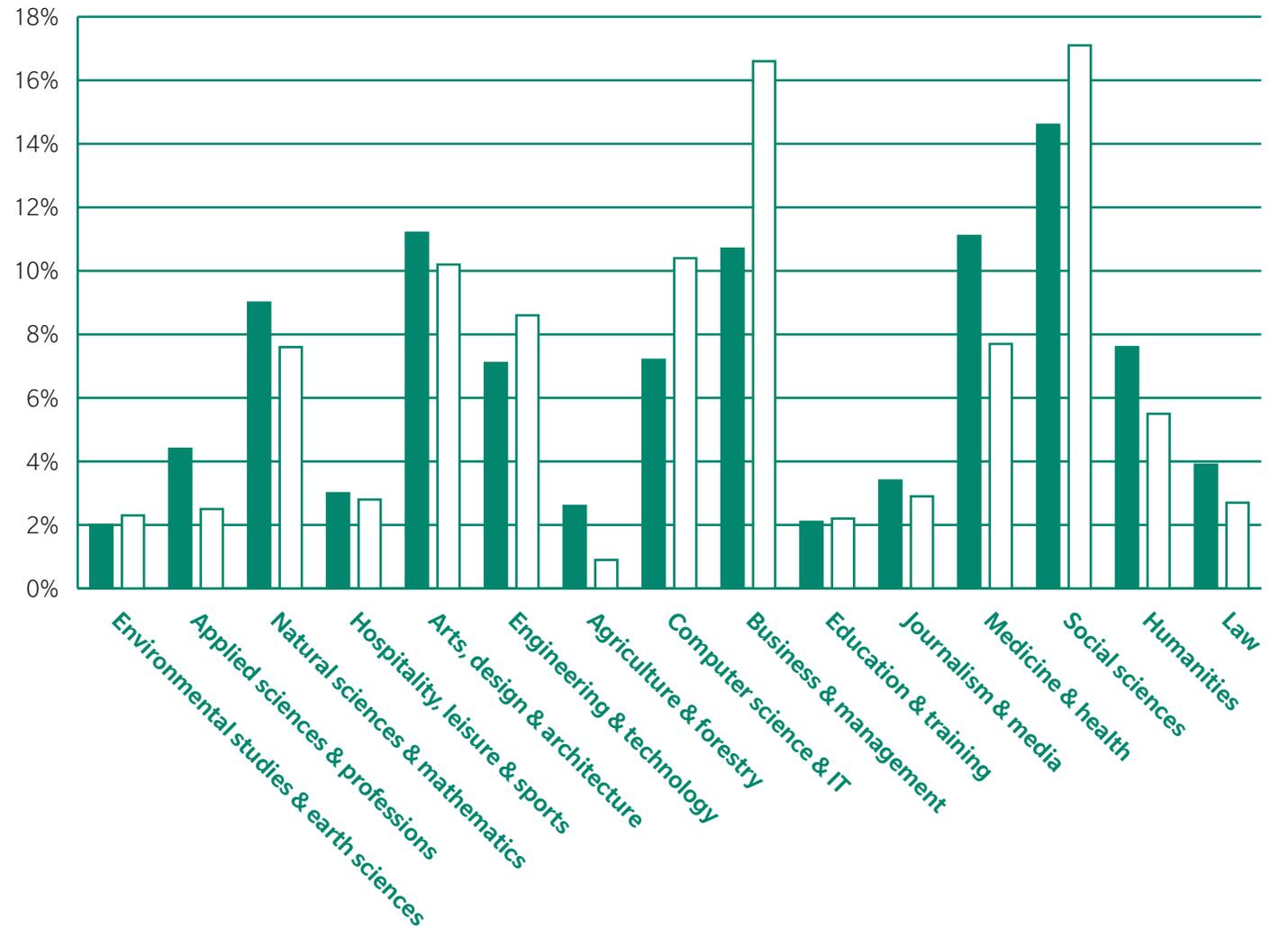
Figure 28 shows that at undergraduate level, social sciences are the most popular discipline for EU/EEA students using Studyportals to explore their options, both in the UK and in EU/EEA countries. Arts, design and architecture, and business and management are also in the top five disciplines for both destinations.

Despite being in the top five for both destinations, business and management courses account for a 6% higher share of student interest in the EU/EEA than the UK. Also slightly more popular in the EU/EEA are computer science and IT, social sciences, and engineering and technology.

Medicine and health is significantly more popular in the UK (11.1% of interest compared to 7.7% at EU/EEA providers), while humanities, applied sciences and professions, agriculture and forestry, natural sciences and mathematics, law, arts, design and architecture, journalism and media, and hospitality, leisure and sports are all slightly more popular in the UK.

**Social sciences are the most popular discipline for undergraduate EU/EEA students using Studyportals to explore their options**

**Figure 28:** Proportion of European student interest in **Undergraduate subject areas**, comparing UK and European destinations, 2022

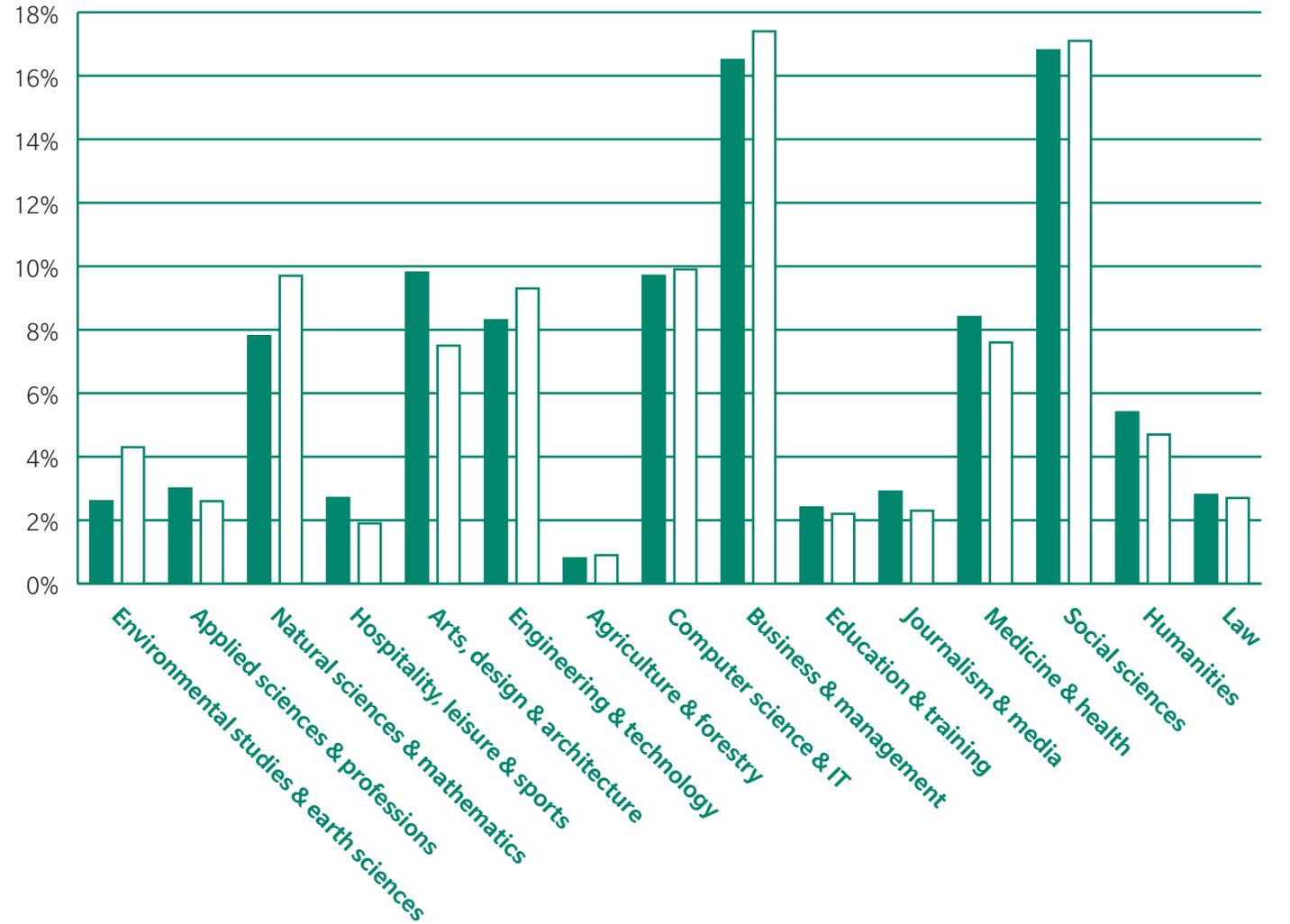


Data source: Studyportals, July 2022

Figure 29 confirms that the social sciences and business and management courses also dominate student interest at the postgraduate level.

Variation in interest between the two destinations are smaller at the postgraduate level than at the undergraduate level, but a largely similar pattern of which subjects are more popular where emerges. Medicine and health and the humanities are more popular among searches for UK destinations, and business and management, engineering and technology, and environmental studies and earth sciences are more popular searches at EU/EEA providers.

**Figure 29:** Proportion of European student interest in **Postgraduate subject areas**, comparing UK and European destinations, 2022



Data source: Studyportals, July 2022



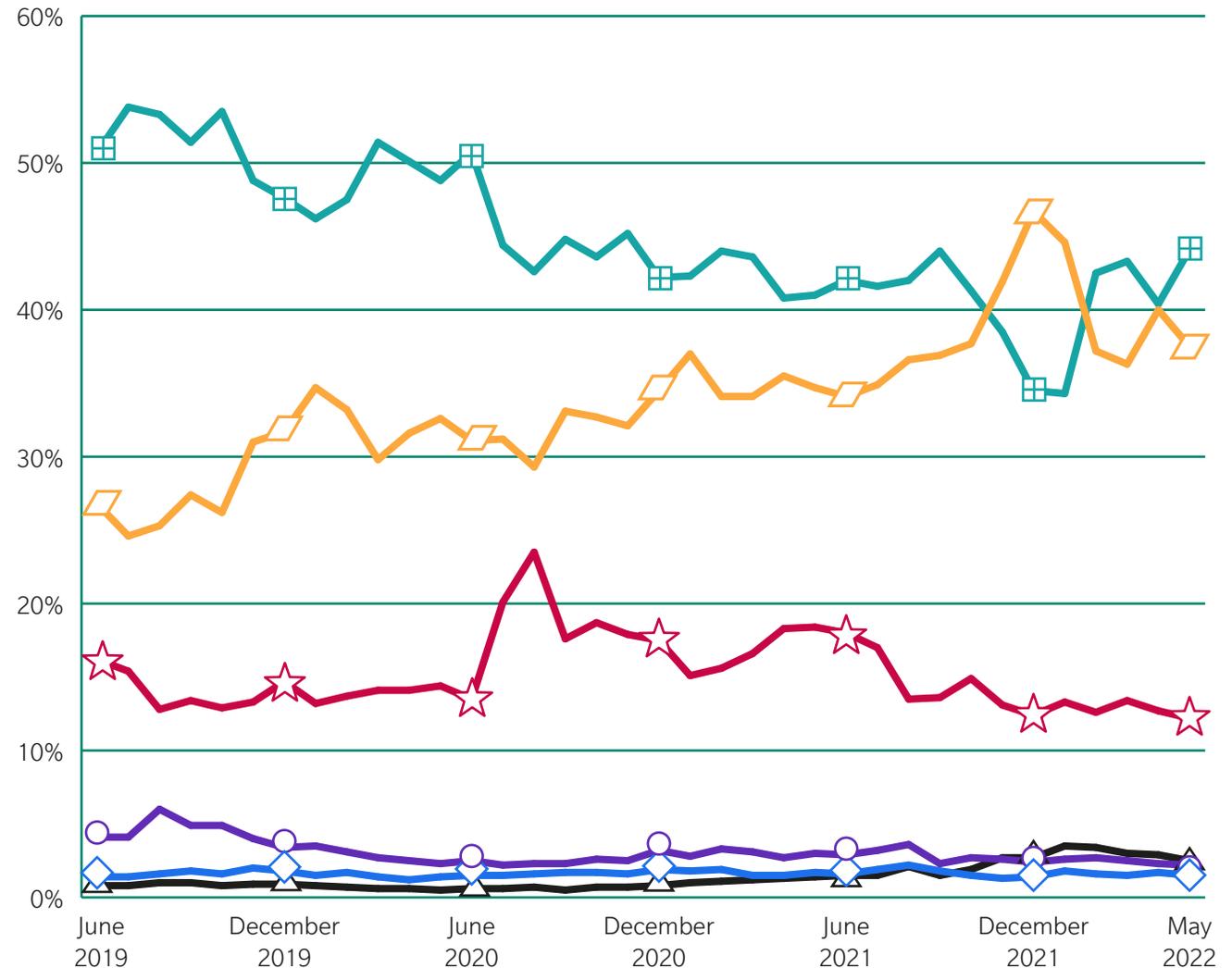
## How has European students' interest in studying UK online programmes varied over time?

The UK higher education system has a strong global reputation for online teaching. Long before the onset of the Covid-19 pandemic led to a worldwide shift to remote learning, UK universities had been innovating in the realm of online pedagogy and delivering teaching to a large number of students around the world.

Figure 30 demonstrates that, unlike demand for on-campus provision, EU/EEA student interest in UK online courses has tended to be higher than for EU/EEA online courses between 2019 and 2022. This comparative advantage has, however, diminished recently, as the UK lost 6.7p.p. of its market share from 2019 to 2022, while EU/EEA providers gained 10.7p.p. over the same period.

The United States accounts for the third largest share of the online study market among EU/EEA students, averaging around 15% across the period, with a spike in interest in August 2020 reaching just over 25%. Interest in online courses from Australian and Canadian institutions is lower, remaining at around 1–3% for each.

**Figure 30:** European student interest share in online programmes from UK, European, US, Australian, Canadian and other providers June 2019 to May 2022



**Figure 31:** Proportion of student interest from selected European student markets in undergraduate and postgraduate online programmes provided by the UK and other key destinations, 2022 with % change comparison to 2019.

Originating country	Destination	Undergraduate		Postgraduate		Originating country	Destination	Undergraduate		Postgraduate	
	Australia	3.1%	-3.2 p.p.	2.5%	-1.7 p.p.		Australia	1.4%	-3.7 p.p.	2.6%	-2.2 p.p.
	Canada	2.9%	+0.6 p.p.	1.5%	-0.5 p.p.		Canada	2.4%	-2.2 p.p.	2.6%	-1.0 p.p.
	EU/EEA	47.9%	+22.4 p.p.	40.0%	+13.4 p.p.		EU/EEA	36.5%	+12.4 p.p.	30.3%	+11.3 p.p.
	UK	27.8%	-20.6 p.p.	38.4%	-12.0 p.p.		UK	41.8%	-10.1 p.p.	47.0%	-7.4 p.p.
	US	13.7%	-2.4 p.p.	14.4%	-1.0 p.p.		US	14.1%	+0.3 p.p.	14.0%	-3.2 p.p.
	Australia	1.8%	-1.1 p.p.	1.7%	-1.3 p.p.		Australia	3.0%	-1.4 p.p.	1.9%	-2.6 p.p.
	Canada	1.6%	+0.4 p.p.	1.2%	+0.6 p.p.		Canada	2.1%	-0.0 p.p.	1.7%	-0.8 p.p.
	EU/EEA	40.2%	+8.8 p.p.	37.3%	+11.6 p.p.		EU/EEA	58.6%	+28.3 p.p.	32.2%	+6.9 p.p.
	UK	32.1%	-12.2 p.p.	42.9%	-10.1 p.p.		UK	18.7%	-25.3 p.p.	46.7%	-3.2 p.p.
	US	17.4%	-2.3 p.p.	13.7%	-3.1 p.p.		US	12.1%	-6.9 p.p.	14.5%	-2.2 p.p.
	Australia	4.6%	-3.1 p.p.	2.8%	-1.8 p.p.		Australia	2.8%	-1.3 p.p.	2.2%	-2.3 p.p.
	Canada	3.0%	-1.0 p.p.	2.2%	-0.0 p.p.		Canada	2.4%	+0.1 p.p.	0.9%	-0.1 p.p.
	EU/EEA	36.6%	+15.7 p.p.	37.9%	+10.3 p.p.		EU/EEA	42.6%	+16.6 p.p.	26.9%	+12.4 p.p.
	UK	34.8%	-16.9 p.p.	42.5%	-6.4 p.p.		UK	33.8%	-21.1 p.p.	60.2%	-7.1 p.p.
	US	15.9%	+0.8 p.p.	11.8%	-3.8 p.p.		US	15.6%	+3.2 p.p.	7.7%	-4.0 p.p.
	Australia	3.1%	-1.7 p.p.	2.1%	-3.0 p.p.		Australia	2.4%	-5.1 p.p.	2.8%	-1.1 p.p.
	Canada	1.9%	+0.2 p.p.	1.7%	-0.1 p.p.		Canada	1.9%	-1.2 p.p.	0.9%	-0.2 p.p.
	EU/EEA	53.0%	+19.2 p.p.	33.0%	+11.9 p.p.		EU/EEA	48.3%	+29.7 p.p.	33.4%	+7.7 p.p.
	UK	23.1%	-22.4 p.p.	48.4%	-5.8 p.p.		UK	28.9%	-29.5 p.p.	44.2%	-11.5 p.p.
	US	15.1%	+1.2 p.p.	12.3%	-4.7 p.p.		US	14.8%	+2.7 p.p.	16.2%	+3.6 p.p.
	Australia	3.1%	-0.4 p.p.	2.7%	-1.9 p.p.		Australia	4.5%	-1.8 p.p.	2.2%	-2.7 p.p.
	Canada	2.4%	+0.3 p.p.	1.0%	-0.3 p.p.		Canada	2.7%	+0.2 p.p.	1.6%	+0.5 p.p.
	EU/EEA	45.0%	+21.1 p.p.	36.9%	+11.4 p.p.		EU/EEA	51.0%	+27.9 p.p.	25.6%	+9.4 p.p.
	UK	27.2%	-32.1 p.p.	42.4%	-11.3 p.p.		UK	27.9%	-28.8 p.p.	57.4%	-6.9 p.p.
	US	18.0%	+7.1 p.p.	14.0%	+0.2 p.p.		US	10.6%	-0.5 p.p.	11.2%	-1.4 p.p.

## INTERNATIONAL STUDENT RECRUITMENT FROM EUROPE: THE ROAD TO RECOVERY

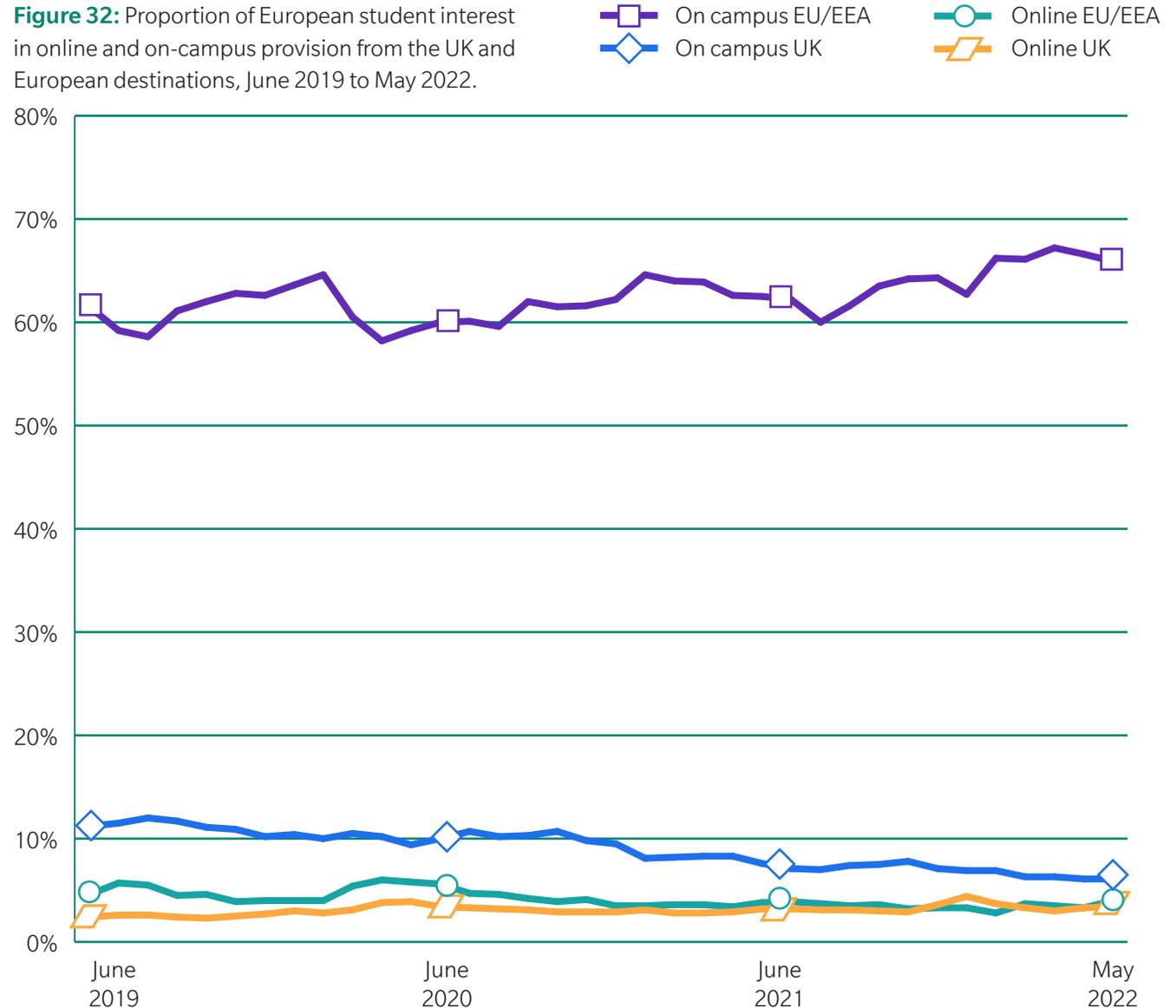
Student interest in online degrees follows a similar trend when examined through the lens of our 10 key European markets.

Examining Figure 31, we can see there has been a clear redistribution of interest from UK-based programme providers to EEA-based programme providers. At the undergraduate level, France and the Netherlands are the countries with the largest proportion of their student interest in online programmes going to the UK in 2022.

The sharpest redistribution away from the UK came in Spain, Switzerland and Portugal at undergraduate level and in Germany, Switzerland and Spain at postgraduate level.

Figure 31 also shows that UK providers have a stronger share of the market for online postgraduate degrees than for undergraduate, accounting for between 38–60% of the market in each of the 10 countries. The shift in demand away from UK programmes has also been less pronounced at the postgraduate level, with an average decrease of only 8.2p.p. across the 10 countries, compared to an average drop of 21.9p.p. for undergraduate courses. This resilience in demand for UK online postgraduate programmes across a range of key countries is an encouraging sign. Student interest in UK online postgraduate programmes is especially

**Figure 32:** Proportion of European student interest in online and on-campus provision from the UK and European destinations, June 2019 to May 2022.



strong from Romania (60.2% market share in 2022) and Portugal (57.4%), while the UK also captures more than 40% of the market in Italy, France, Poland, Switzerland, Greece and Spain.

Interest in online programmes was also captured by providers beyond the UK and the EEA. EEA students started looking more at online degrees offered by US providers or providers in 'other destinations', such as those based in South Africa, Malaysia and Turkey. The United States increased its undergraduate online market share in Spain (+7.1p.p.), Romania (+3.2p.p.), and Switzerland (+2.7p.p.). Other destinations also saw strong growth of between 3–7p.p. in Greece, Poland, Netherlands, Spain, Switzerland, France and Germany. Neither Canada nor Australia registered growth of more than 1% in any of the 10 countries at undergraduate or postgraduate level.

Student interest in on-campus provision at EU/EEA providers far outstrips demand for online provision. In comparison, the levels of demand for UK online and on-campus courses are much more closely aligned, demonstrating the relative strength of the UK online brand. The fact that EU/EEA student demand for UK online programmes is comparable to, and oftentimes larger than, the total combined demand for online programmes from dozens of EU/EEA countries, as shown in Figure 32, is remarkable.

# Potential growth markets and opportunities

**The findings of this report provide some grounds for cautious optimism when it comes to the prospects for UK recruitment of European students. They also suggest some areas where proactive identification and prioritisation of opportunities might allow UK providers to accelerate progress towards a new equilibrium in the recruitment of European students.**

## Established markets

We can identify a group of established markets which are the long-term primary sources of European students in the UK at all levels, including Italy, France, Spain, Germany and Ireland. As well as their high student numbers, these countries are also less likely to have historically relied on tuition fee loans in the UK to fund their studies. As a benchmark, HESA data shows that 65% of UK students and 49% of all students from European Union countries accessed tuition fee loans in 2020–21. Spanish students access loans at the same rate as the average European student (49%), but Italy (38%), Ireland (33%), France (23%) and Germany (21%) all sit well below the benchmarks.

Protecting recruitment from these countries is especially vital at the postgraduate level as they make up five of the top seven slots for European sending countries at postgraduate research and five of the top six at postgraduate taught level.

Lead indicators for these established markets provide a mixed picture but generally suggest they are likely to retain their relative position as some of the most substantial European recruitment markets, albeit smaller than before 2021–22. UCAS application data suggests demand from Ireland is resilient and possibly even growing, reflecting Irish students' continued access to study in the UK without visas and with access to home fees and tuition fee loans. UCAS application data indicates a slightly less rosy picture for the UK's other established markets, with year-on-year decreases of more than 30% from 2020 to 2021. Compared to most other European sending countries however, these decreases are not as severe as they could be, and 2022 in-year application data shows that the rate of decrease is slowing.



The UK's market share of student interest in these established markets has also not dropped precipitously according to the Studyportal data.

Germany, especially, has seen only very small percentage point drops in interest in studying in the UK at both the undergraduate and postgraduate level

Some redistribution of interest to other high cost anglophone destinations indicates German students are less price sensitive and retain an appetite for anglophone provision. Despite slightly larger reductions in student interest, opportunities in the other established markets can be identified at the level of study and subject of study degree. Italian demand for undergraduate study remains resilient, matching well with the popularity of UK arts, design and architecture courses at this level of study. Interest from France remains high, especially at the postgraduate level. Spanish student interest appears to have taken the most substantial overall hit compared to the other established markets, but strong momentum in HESA data up to 2020–21, along with robust UCAS application and visa application figures, suggest it is unlikely to fall too far, too quickly.

## High-potential markets

This category of countries – those which have not consistently broken into the top 10 sending countries to the UK, but which have high potential for post-dip recovery and growth due to higher incomes and less price sensitivity – includes the Netherlands, Belgium, Switzerland and Turkey. Reliance on student loans is notably low in this group, with all coming in below 30%, far below the European average of 49%. Dutch, (16%), Swiss (12%) and Turkish (1%) students have had especially low reliance on UK tuition fee loans.

In terms of lead indicators, UCAS applications from Switzerland dropped by only 7% from 2020 to 2021. Higher average drops of 30% and 34% were recorded for Belgium and the Netherlands respectively. Acceptances of Swiss students dropped by lower-than-average amounts (around 20%), while Belgium and the Netherlands saw drops in acceptances closer to, but still less steep than, those experienced by established sending markets, and historically high-quantity sending eastern and southern European markets.



The Netherlands saw the smallest percentage point drop in UK market share of student interest at both the undergraduate and postgraduate level from our group of selected key markets. The drop in Swiss interest in the UK was also relatively low at the postgraduate level, with the UK maintaining a strong 12% market share of this segment in 2022.

Turkey is another potentially highly important market for the UK. The strong year-on-year growth in undergraduate and postgraduate research enrolments from Turkey from 2015–16 to 2020–21, coupled with the recent growth in UCAS applications – 9.5% increase June 2022 vs June 2021, and 25.1% increase June 2022 vs June 2020 – make Turkey a key market for future recruitment.

Dutch students buck the prevailing trend, in that they are not mostly concentrated in business and management courses but are spread across a range of subjects, making them an attractive cohort to cultivate for providers looking to boost international student diversity across a range of subject areas. Belgian students are also not overly concentrated in their most popular subject area, with strong interest in social sciences and engineering and technology.

# 25.1%

**increase in UCAS  
applications from Turkey  
June 2022 vs June 2020**

## Speculative markets

This final category of countries have, up until 2020–21, sent high numbers of students to the UK, but due to heavier reliance on student loans are more likely to have higher price sensitivity. These include Romania, Portugal, Poland and Greece. From 2016–17 to 2020–21 student numbers in the UK from these countries increased by 57% (Romania), 60% (Poland), and 124% (Portugal) – far above the growth rates of any other countries in the top 20. Greek student numbers saw a slight decrease over this period, but Greece remains firmly in the top 10 up until 2020/21. Reliance on tuition fee loans is a significant concern among this group and makes it more difficult to project future enrolments. Romania (79%), Poland (72%), Portugal (67%), are all firmly above the European average in terms of access to tuition fee loans. Greece (47%) just fits in below average on access to tuition fee loans, but its overall student numbers trending slightly downward in recent years is not a positive sign.

Lead indicators for these speculative markets vary strongly from country to country. Portugal, for instance, has seen continuing growth in UCAS applications into 2021 and has become the leading European country for number of UCAS acceptances. On the other hand, UCAS applications and acceptances from Romania

and Poland have dropped dramatically (acceptances for both countries down more than 80%), with numbers from Greece also dropping by more than 50%. June 2022 UCAS deadline data shows another drop from 2021 for these countries, although the rate of decline has slowed compared to the previous year.

In terms of search behaviour, the majority of these countries have seen substantial shifts away from the UK to other EU/EEA destinations. Greece saw the largest redistribution away from the UK, while the drops for Poland and Portugal at undergraduate level were also large. However, demand for postgraduate courses from Poland and Portugal has not dropped sharply, and the decrease in search interest in courses at both levels of study from Romanian students was also encouragingly shallow.

Given the soaring numbers of Romanian undergraduates reflected in the HESA data in the 2020–21 academic year, the student interest data, which indicates the ongoing popularity of the UK, provides some hope that UK will retain a segment of this large market.

## From 2016–17 to 2020–21, student numbers increased by:



Opportunities at a subject level exist in design, and creative and performing arts subjects and computing for attracting Polish and Romanian students, and in social sciences for attracting Greek and Portuguese students. Online provision may also be a particular area of strength for this group. Student interest in UK online postgraduate programmes is especially strong from Romania (60.2% market share in 2022) and Portugal (57.4%), while the UK also captures more than 40% of the market in Poland and Greece. Furthermore, Greece could have more opportunities for growth and development in transnational education provision in the short term as a viable alternative or complement to student recruitment.

These countries, especially Greece and Romania, also have relatively underdeveloped English-medium instruction offers compared to their north-western European counterparts. This means almost all students from this group wishing to study in English will need to look beyond their domestic higher education systems, and most likely (apart from in Portugal's case) also beyond their immediate regional neighbours. This presents opportunities for the UK to continue to capture student interest from this group, if they can be convinced that study in the UK is worth the added cost compared to an EMI offer elsewhere in Europe.

## Discipline-based opportunities

Studyportals data show certain academic discipline and level-of-study combinations to be significantly more popular at UK destinations than at EU/EEA destinations. These differences are not as straightforward as a simple STEM vs non-STEM dichotomy and could be leveraged by UK providers to make promotion activity more targeted and strategic.

At the undergraduate level, medicine and health makes up a significantly higher proportion of European student interest in UK courses than in EU/EEA courses. Meanwhile, despite business and management courses being the most common subject area to study in the UK for students from all top 20 European sending countries, according to HESA in 2020–21, the relative rate of interest in business and management courses at UK providers was significantly lower than at European institutions. This may indicate that the market for these courses is relatively saturated for European students both at home and abroad, and they are beginning to explore alternative course options when looking at the UK as a study destination. Universities may wish to identify and capitalise on smaller subject areas where they have a competitive advantage, rather than focusing on the high-volume programmes for which there is already an expansive EU/EEA offering.

By and large, similar trends emerge in preferences for where to study across the range of subjects at undergraduate and postgraduate level. The most marked exception to this is in natural sciences and mathematics, where the UK outperforms the EU/EEA in undergraduate interest, but the reverse is true at postgraduate level.

Top five **undergraduate** subjects at **UK** universities by EU/EEA student interest:

1. **Social sciences**
2. **Arts, design and architecture**
3. **Medicine and health**
4. **Business and management**
5. **Natural sciences & Mathematics**

Top five **postgraduate** subjects at **UK** universities by EU/EEA student interest:

1. **Social sciences**
2. **Business and management**
3. **Arts, design and architecture**
4. **Computer science and IT**
5. **Medicine and health**

Data source: Studyportals, July 2022

Top five **undergraduate** subjects at **EU/EEA** universities by EU/EEA student interest:

1. **Social sciences**
2. **Business and management**
3. **Computer science and IT**
4. **Arts, design and architecture**
5. **Engineering and technology**

Top five **postgraduate** subjects at **EU/EEA** universities by EU/EEA student interest:

1. **Business and management**
2. **Social sciences**
3. **Computer science and IT**
4. **Natural sciences and Mathematics**
5. **Engineering and technology**

# Reflections and recommendations – where next for European recruitment?

## What lessons can the government and UK higher education providers take from the data?

Despite some positive points, there is no avoiding the fact that a significant drop in European enrolments is likely for the 2021–22 and 2022–23 academic years. Lead indicators in the form of UCAS and visa application data, as well as student search data from Studyportals, indicate that numbers are down and a significant transfer of European student interest away from UK courses and towards European courses, particularly, has occurred over the past three years.

In absolute terms, the number of page views UK courses attract has dropped by 28%, and the UK's share of all European student interest has dropped by 5.9p.p.

As the most far-sighted indicator available to us, the Studyportals data indicate that we might expect enrolments to bottom out in either the 2022–23 or 2023–24 academic years, but even this involves a significant degree of speculation.

This changing landscape necessitates a reorientation in thinking and approach towards recruiting from Europe compared to the pre-Brexit status quo. Institutions and government were previously able to treat European Union countries as effectively an extension of the domestic student market, requiring little resource investment to maintain strong and consistent flows of high-quality students. That is now firmly no longer the case.

The cost and administrative barriers now faced by European students will likely raise expectations and require more effort and resources from the UK side to convince them that their experiences and outcomes will be worth the cost.

Resourcing should be considered holistically in the context of the rising cost of recruitment from major international source markets and potential constraints to expanding activity in high-cost regions.

**We must not settle for inertia, watching numbers decline and waiting for the 'bottom'. A generation of students whose expectations were not shaped by the pre-Brexit status quo is coming through the pipeline and they are making decisions now.**

# Recommendations

## 1

### **Stabilising and regrowing European recruitment should be prioritised as a vital source of diversity and stability**

The pool of prospective students will almost certainly be smaller as a result of the changes brought about by Brexit, but applications and enrolments from Europe continue to form a significant portion of all international applications and enrolments, especially at undergraduate level, and it is therefore important that the task of engaging with and growing this pool is not deprioritised.

European students make up the second largest group of international students in the UK, exceeded only by students from Asia at every level of study. Within the UK's international student population in 2020–21, students from Europe accounted for 39.5% of undergraduate students, 31.5% of postgraduate research students, and 14.7% of postgraduate taught students. European students also make up the largest group of international students in biological and sport sciences; psychology; physical sciences; historical, philosophical and religious studies; and combined and general studies. In each of these subject areas, European students account for between 41.2–52.2% of international students.

The diversity of students from across the 27 EU member states and wider Europe contributes greatly to the vibrancy of UK university campuses. Contributing to the education of the next generation of European social, political, arts, scientific and business leaders will also set the groundwork for mutually beneficial relations between the UK and its closest neighbours in the years to come.

European students currently make up a significant proportion (nearly a quarter) of the UK International Education Strategy's 600,000 international student target, which was achieved in 2020–21. The growth towards that target has been largely driven by historically dynamic markets and we cannot be certain that growth from these markets will be sustained.

Therefore, the EU should form a key part of a diverse recruitment portfolio for UK institutions.

Plans to maintain the student recruitment target should include a strategic focus on stabilising and regrowing the number of European students, and not simply relying on other growth markets to make up the shortfall, which would compound the UK's risk exposure.

The EU should be treated as a regional priority for international recruitment with appropriate policy focus, resource and investment to other important markets.

Furthermore, in the context of increasing concerns around risk and diversification, given the relative stability of EU economies, cultural ties, and existing educational infrastructure, once stabilised European student recruitment flows may be less susceptible to short-term shocks than other sending regions.

# 2

## The UK should build on its existing strategic advantages and seize new opportunities in Europe

Opportunities exist which might allow UK providers to accelerate progress towards recovering the rate of European recruitment, and the data present reasons for optimism. Alongside the country priorities from the previous chapter, Studyportals data shows that monthly totals of page views for UK courses have begun to stabilise, and by using average timescales for the journey from research to enrolment we can extrapolate that, if this stabilisation holds, the low point for European enrolments is likely to come in either the 2022–23 or 2023–24 academic years.

Furthermore, the Studyportals data show that fewer students showing interest in studying in the UK has not translated into more students looking to study in their home country (apart from students in Poland). The data demonstrate that European students' preference is still mostly towards international mobility for study, demonstrating the continued opportunity for recruitment from within the EU.

Data from UNESCO and Studyportals does not suggest a major shift in European student interest towards studying in the USA, Canada or Australia.

Taken in a positive light, it may be reasoned that factors such as geographic proximity, systems alignment through the Bologna process, institutional links fostered through many years of collaboration, word-of-mouth from generations of alumni, and the UK's longstanding reputation for high quality may function to preserve the UK's competitive edge when it comes to attracting European students, but we cannot be complacent. In terms of actual enrolments, the UK may yet see loss of market share in some EU countries to these destinations, and in all scenarios we need to further develop, articulate and evidence the benefits of studying in the UK.

Data also suggests the price sensitivity of European students, while also potentially indicating which European students may be price sensitive. While the transfer of interest to EU/EEA destinations may be driven by the increased cost of study, students whose interest in UK courses remains now likely represent the market segment with the means to self-finance a UK degree. Where the data shows that the UK's shift to international fees has not precipitated a largescale transfer in interest to other anglophone destinations, this may indicate the UK brand's strengths and the value of proximity.

**The low point for European enrolments is likely to come in either the 2022–23 or 2023–24 academic years.**



## Practical barriers to study in the UK should be reduced and tailored messaging should be crafted to appeal to European students

To protect the UK's advantage against the other major anglophone destinations, it will be essential to ensure that the financial barriers for prospective European students are reduced. As highlighted in [the second part of this report series](#), UK student visa costs and the NHS health surcharge are comparatively more expensive than for other key destinations. As the nationality profile of students applying to the UK is changing, the UK could cement its advantage among an increasingly cost-sensitive portfolio of key source countries, including

those in Europe, by reviewing student and post-study work visa costs to bring them in line with competitors. Targeted scholarships and access to legitimate and secure alternative finance services might help to soften the blow of losing access to UK student finance in the form of tuition-fee loans. It will also be vital that the value-for-money of a UK degree is clearly demonstrated, with emphasis on building the evidence base around international graduate outcomes and the post-study work opportunities opened up via the Graduate Route. While these interventions cannot replace all the privileges of free movement, they may provide a degree of mitigation.

Future research will be necessary to establish the evidence, understanding how EU students perceive and go on to use the UK post-study work visa opportunities, and how can we build this into the 'brand UK' messaging more clearly.

Further research should be conducted to understand what specific qualitative factors inform European student decision-making, and how these factors manifest in the student interest data. More detailed feedback should also be gathered on why EU students choose the UK over other anglophone destinations, considering the importance of distance, cost, value-for-money, post-study work opportunities, cultural familiarity and other factors.

**It will also be vital that the value-for-money of a UK degree is clearly demonstrated, with emphasis on building the evidence base around international graduate outcomes and the post-study work opportunities opened up via the Graduate Route.**

## 4

## The UK should support and promote a broad range of education internationalisation activities and engagement with Europe, which can provide a cross-cutting benefit to student recruitment

Beyond addressing the technical and practical barriers to student recruitment from Europe, the UK should also consider how its wider higher education and research collaboration offer to the EU impacts on recruitment from the region.

Opportunities exist through the expansion of transnational education connections with Europe – helping to spread the UK brand, and channel

students through pathways onto further study in the UK, as evidenced by the joint UUKi and British Council report UUKi report Transnational routes to on-shore UK higher education (2020). Furthermore, universities and government should seize the chance to develop and capitalise on the UK’s stellar reputation for online learning. Studyportals data shows that EU/EEA student demand for UK online programmes is comparable to, and often larger than, the total combined demand for online programmes from all EU/EEA countries put together. Interest in online programmes at the postgraduate level is particularly strong.

Universities may be cautious to avoid ‘cannibalising’ their own on-campus recruitment by promoting online provision – no evidence from previous UUKi research or from the Studyportals data suggests this is the case, and online course provision may provide a useful vehicle for diversification of income streams, as well as opportunities for subject-related diversification and sustainability. Transnational education may also be an option for capturing demand in price sensitive markets. Further research should be considered to explore the complementarity between demand for transnational education, online learning and on-campus recruitment in Europe.

We should not underestimate the cross-cutting influence of different strands of internationalisation activity. The isolating effects of loss of freedom of movement and the reduction in inward mobility of students from the EU/EEA through the Erasmus programme may have longer-term consequences on student recruitment from within the EU.

Difficulties with obtaining visas for short-term study and work placements in the UK, along with a move away from reciprocal funding for student exchanges, mean that the number of European students who come to the UK as part of their degree is likely to decrease, forfeiting the word-of-mouth promotion that occurs when mobile students return to their home countries and share their positive experiences of the UK as a study destination. Similar effects may arise should the UK fail to associate to the Horizon Europe programme, as crucial links between the European and UK university systems would receive less support.

It is therefore important to identify and remove barriers to the continued mobility of staff and students between the UK and EU/EEA region, and to develop a more joined-up approach to visas for inbound students across the different visa categories.

In any refresh of the UK government’s International Education Strategy, the strategy should recognise Europe and the importance of European students to delivering its on-campus recruitment and transnational education goals and set out some key actions and priorities. The refreshed strategy could incorporate recommendations from this report and include targeted government support for recruitment in key markets, support for further research into key topics mentioned, and a reaffirmed statement of intent/commitment to ensuring the UK remains the most attractive overseas study destination in the world for European students. This should be a title that the UK sector is incredibly proud of, and one it should protect jealously rather than squander as a result of complacency or resignation to forces outside of our control.

## About Universities UK International

Universities UK International (UUKi) represents UK higher education institutions (HEIs) globally and helps them flourish internationally. To do this we actively promote UK HEIs abroad, provide trusted information for and about them, and create new opportunities through our unique ability to act at sector level. We draw on UK university expertise to influence policy in the UK and overseas, delivering information, advice and guidance to facilitate mutually beneficial collaboration between UK HEIs and a broad range of international partners.

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## About Studyportals

Studyportals is the most comprehensive study choice platform featuring 250 000 English-taught programmes from 3,750+ institutions and attracting 52 million visitors per year from around the world. Based on the search behavior of those 52 million users the Analytics and Consulting team at Studyportals provide real-time, forward looking market insights on student interest for international education. Our mission is to empower the world to choose education by making study choice transparent, globally. At the same time, our results-based channels help universities with marketing and international student recruitment, by enabling them to reach a global audience and diversify their student population.

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