

NOVEMBER 2024

Transforming Student Futures.

Insight and analysis of
NCUK University Pathway
students' perceptions

NCUK
UNIVERSITY PATHWAYS

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Introduction



Increasingly, international students are choosing to start their university studies within their home countries by enrolling in pathway programmes, and universities are recognising pathway provision as a key recruitment channel and a fundamental ingredient for their diversification and transnational strategies.

In this context, NCUK has partnered with IDP Education to better understand the perceptions of international pathway students.

Specifically, this report provides insights about:

- International pathway students' learning preferences and motivations;
- Their awareness about destination policies and the impact they have in students' decisions;
- International pathway students' post-study plans.

Reaching out to c.1,000 NCUK students from over 90 different countries studying International Foundation Year, International Year 1, International Year 2 and Master's Preparation programmes; this survey provides relevant insights for NCUK and other pathways providers keen to better understand their audiences' preferences, expectations and motivations within the evolving higher education landscape worldwide.

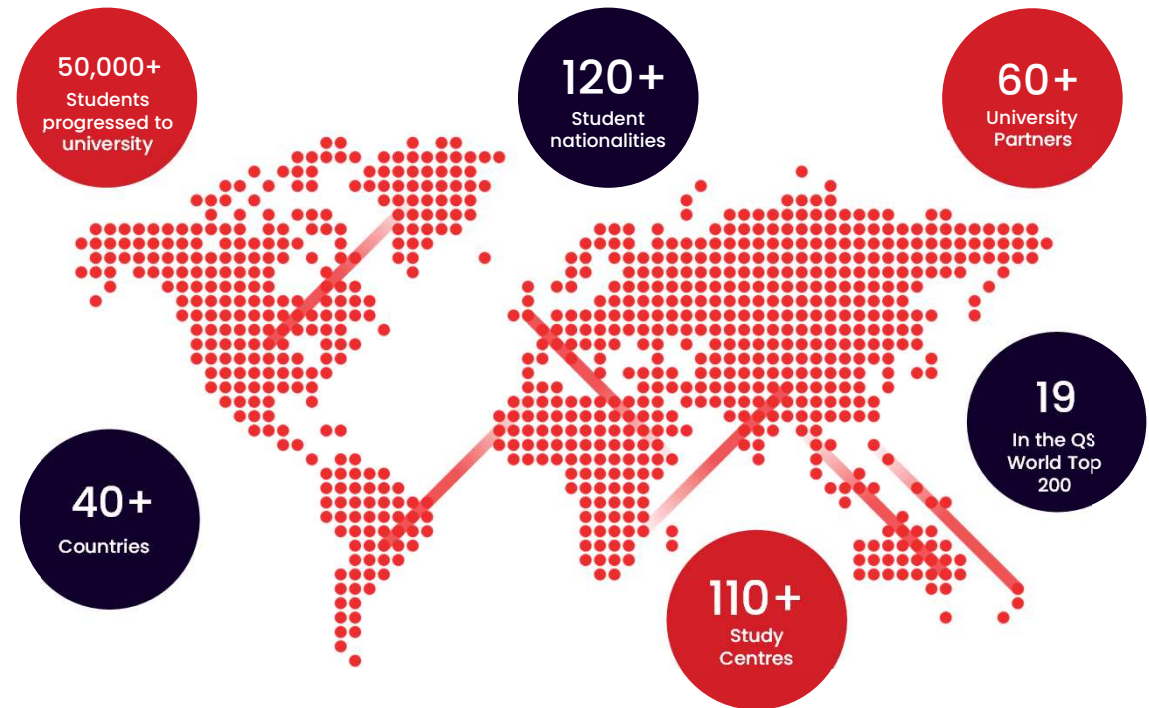


Andy Howells
Chief Marketing Officer

About NCUK

- **NCUK is a leading global university pathway provider**, established by universities 35 years ago to enable international students to access world-class education.
- With a network of over 110 Study Centres – international schools, colleges and universities – across 40 countries, NCUK provides students with routes to more than 60 leading university partners, including 19 in the QS World Top 200, across popular international study destinations.
- NCUK's high-quality programmes are developed to prepare students from over 120 nationalities for success, with 89% achieving a 2:1 or higher at university.
- To date, NCUK has successfully supported over 50,000 students in reaching their university and career ambitions.

NCUK
UNIVERSITY PATHWAYS



**NCUK HQ in Manchester, UK with regional offices
in Beijing & Kuala Lumpur**

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Research context

Research Objectives

- **Motivations and preferences**
 - Explore student motivations for choosing pathway study
 - Understand students' preferences for study modes
 - Identify perceived benefits of an in-country pathway vs a traditional on-campus pathway
 - Determine destination considerations and preferences
 - Investigate factors influencing destination choice
- **Determine the impacts of policy**
 - Understand awareness and impact of policy updates on students
- **Career readiness and post-study plans:**
 - Explore students' confidence in their study and future career prospects after completing NCUK qualifications

Methodology

- 15-minute survey programmed in Qualtrics
- Administered in English and Chinese
- Distributed via email by NCUK
- Conducted between 23 August – 19 Sept 2024



Key highlights

- **Motivations and preferences**

- **The UK is the preferred destination** for 59% of NCUK students.
- **Fully on-campus learning is favoured by** 66% of NCUK students.
- **The student leads decisions on destination and programme**, especially regarding programme choice, though their decisions are also influenced by their parents.
- **Access to higher-ranking universities is the main benefit of in-country pathways** for students opting for the NCUK pathway program, followed by easing the transition to an international education system.

- **Destination Policy**

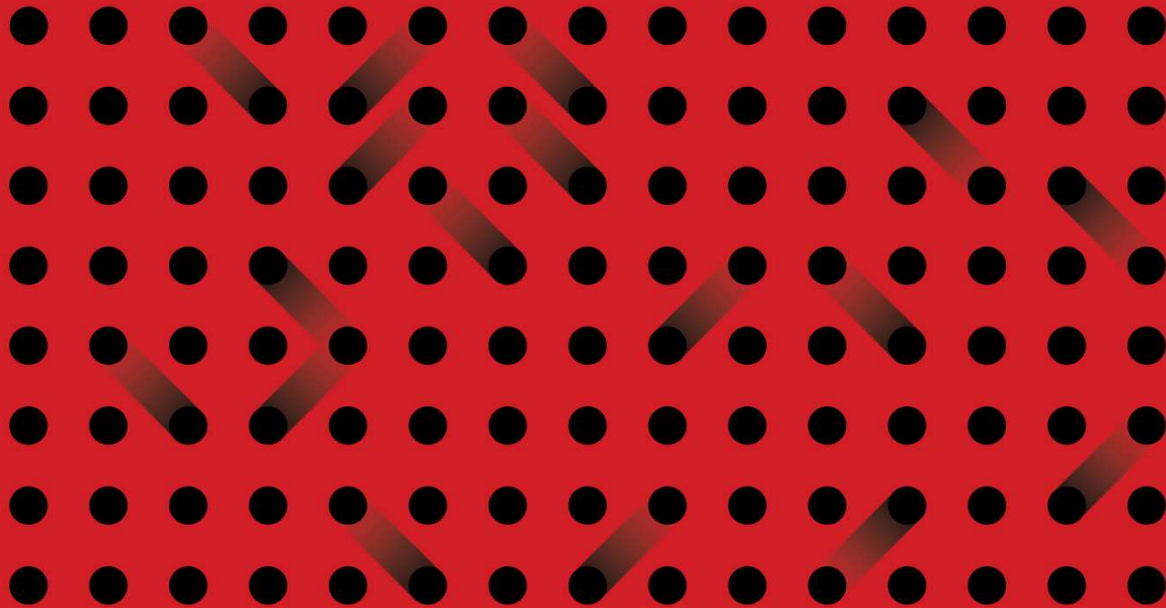
- Students aiming to study in Canada and the UK are more aware of the recent policy changes on post-study work permits and financial requirements, while students considering Australia are more aware of the updates on student visas.
- For all three countries, **finance-related policies are the most influential** in future students' decision-making.
- For the US, **the election outcome is unlikely to impact the choice of most Asian and African students** considering studying there.

- **Career Readiness and Post-Study Plans**

- **89% of students are confident about the NCUK pathway** and its ability to enhance their career prospects.



Survey overview

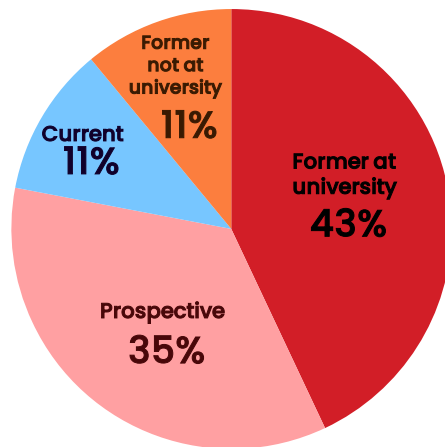


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Student respondent profile (1 of 2)

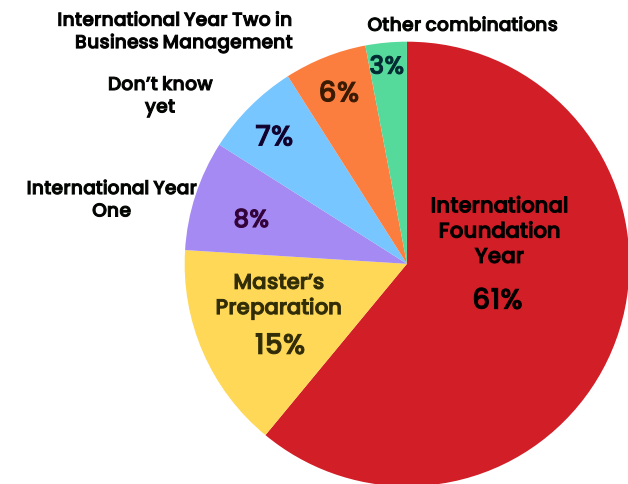
967 respondents from across the globe

Study Status

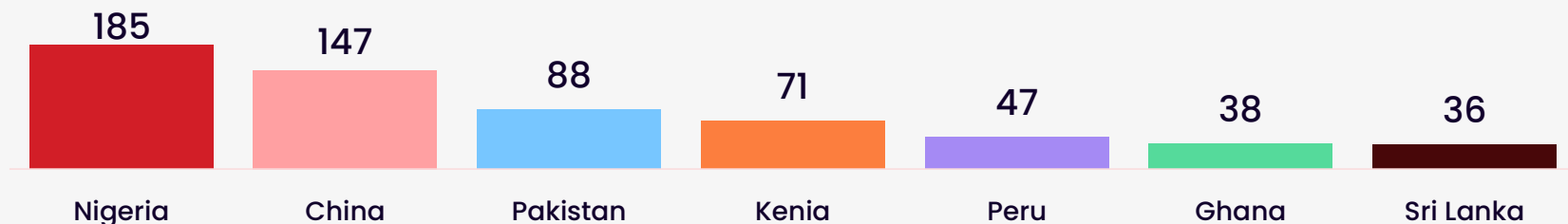


Respondents from
91
different countries

Qualification



Top Source Markets

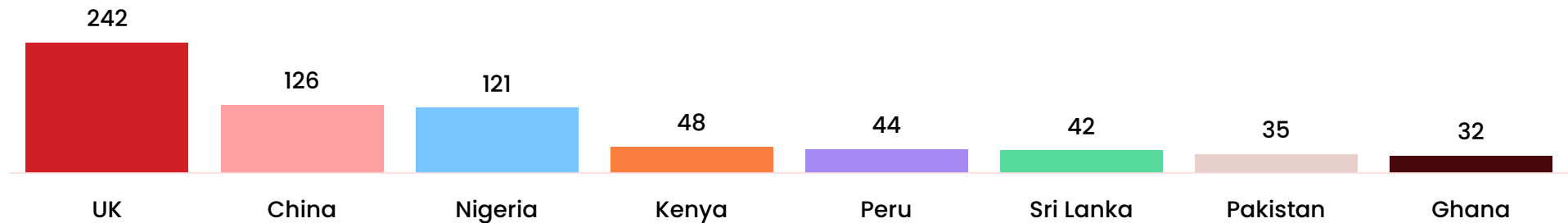


Student respondent profile (2 of 2)



A vast majority of respondents studied at, are currently studying, or intend to study at UK-based NCUK study centres and universities

Top Study Centre Markets



Top Five University Markets

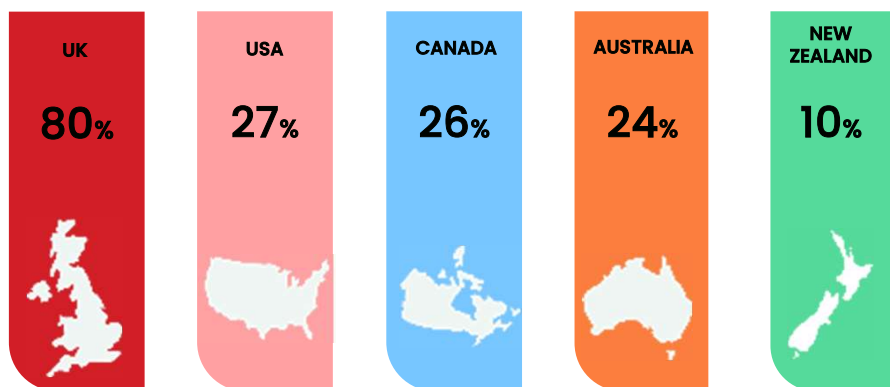


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Destinations choices

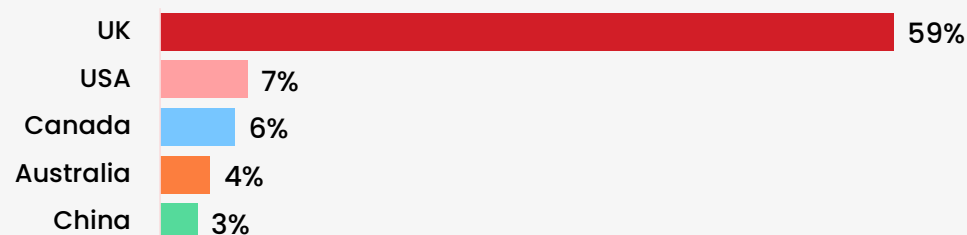
The UK dominates preference by far with the USA, Canada and Australia considered by nearly three out of ten

Which destination countries are you considering/did you consider to study in or receive your international degree from?



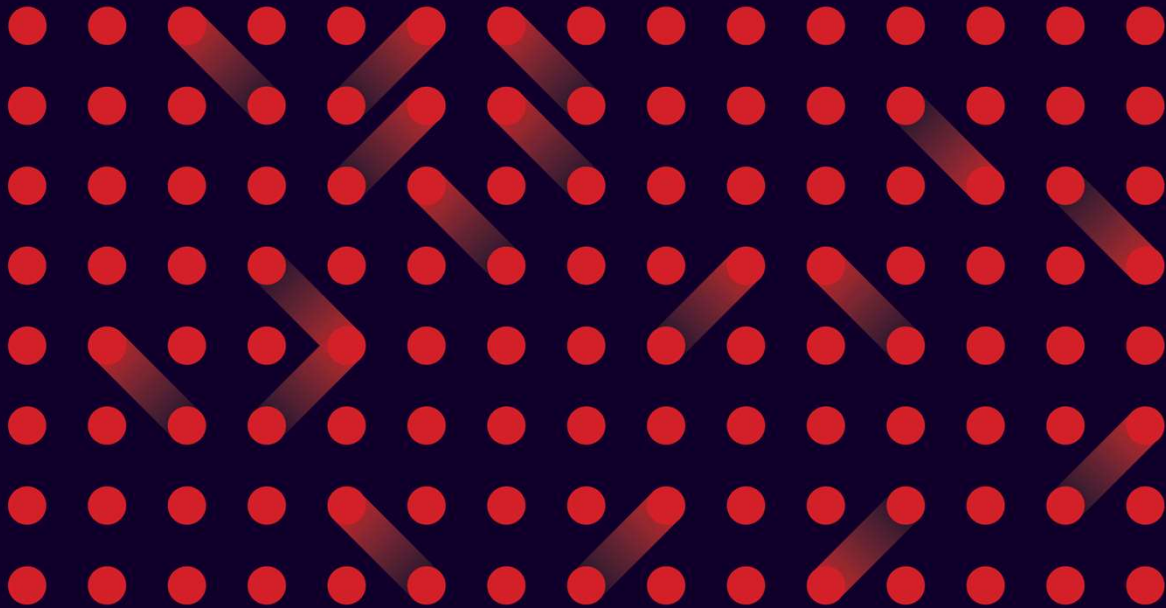
- A vast majority (80%) of the respondents are considering/considered the UK as their preferred study destination. A far second is the US with 27%, followed closely by Canada with 26%
- When looking at source markets individually and among the top-responding, the UK is the top study destination choice in all of them except in Ghana¹, where Canada takes the top position, as selected by 74% of the respondents

Preferred Destinations



- From the set of destinations considered, prospective students were asked to indicate their first-choice destination. In contrast, students who have already applied to or are already studying at an NCUK Study Centre were asked to indicate their intended study destination. Former students who are in university were asked to select their current study location. The chart above shows these responses
- As a result of a **dominance of respondents who studied at, are currently studying or intend to study at UK-based NCUK study centres and universities**, a majority selected the UK as their preferred destination. This is followed by the USA, Canada and Australia, although with considerably lower percentages. Furthermore, even among more diverse samples, such as that seen in IDP's most recent research (Emerging Futures 6, August 2024), the UK ranks first among prospective pathway students and second among current students and pathway applicants (after Australia)

Learning Preferences and Motivations



2

Motivations to study for an international qualification

Most students pursue overseas education for its high quality, with key differences in Nigeria, Peru and Ghana

- Looking at the total responses as a whole, education quality (e.g., high-ranking institutions, evaluation standards or education quality) is the top reason why respondents choose to study qualifications overseas, selected by 60%. This is followed by career development motivations, including increased employability and monetary benefits (58%) and acquiring knowledge (e.g., global ways of learning or thinking) (51%).
- At a source market level, however, a few key differences can be identified. For instance, career development goals are the most popular motivation among Nigerian (68%) and Peruvian (75%) respondents. Meanwhile, for Ghanaians, social networking is the top reason for seeking international qualifications (74%).
- By qualification type, career development is also the top motivation for those who did/are planning to do a Master's preparation programmed or an International Year Two in Business Management. Similarly, career development is also top among prospective and current NCUK students.

People have different reasons why they choose to study for an international qualification. Which of these reasons relate to you?

	Grand Total (n=967)	Nigeria (n=185)	China (n=147)	Pakistan (n=88)	Kenya (n=71)	Peru (n=47)	Ghana (n=38)	Sri Lanka (n=36)
Education Quality	60.1%	62.2%	67.3%	48.9%	59.2%	63.8%	68.4%	72.2%
Career Development...	57.6%	68.1%	61.2%	48.9%	57.7%	74.5%	71.1%	50.0%
Knowledge...	50.7%	60.0%	61.2%	37.5%	46.5%	53.2%	60.5%	44.4%
Reputable qualifications...	48.1%	58.4%	47.6%	35.2%	47.9%	61.7%	68.4%	68.7%
Social networking...	43.4%	45.4%	52.4%	31.8%	50.7%	29.8%	73.7%	50.0%

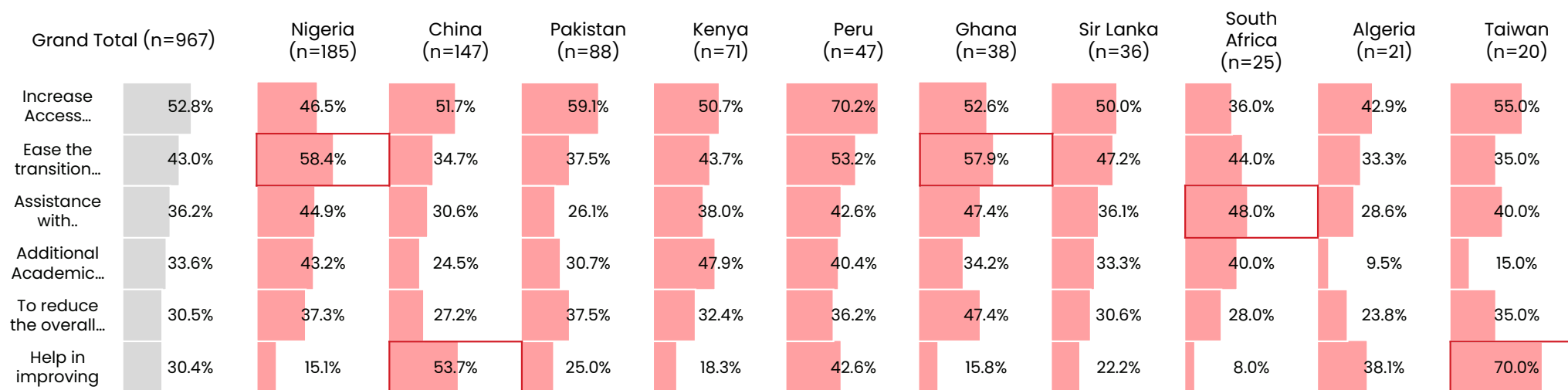
Benefits of NCUK programmes



Over half of NCUK prospective, current and former students seek an increased access to higher-ranked universities

- Overall, the most sought-after benefit is the increased access to higher-ranking universities, as selected by 53% of the respondents. This is also the highest across all study statuses and across most of the top-responding source markets.
- Exceptions to this include Nigeria and Ghana, where the most selected benefit was to ease the transition to an international education system (58% for both), China and Taiwan, where help in improving English language skills is the most sought-after (54% and 70%, respectively), and South Africa, where the top benefit is assistance with academic preparation (48%). It must be noted, however, that both Taiwan and South Africa recorded small sample sizes.

Which of the following benefits of an NCUK pathway programme are you personally seeking?



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Greatest influence on where to study internationally

Whilst a majority decide where to study themselves, nearly half of the respondents are influenced by their parents

- A vast majority of respondents (68%) indicated that they decide for themselves where to study internationally. This is also the case when looking at top-responding source markets individually. However, a significant 49% also indicated that their parents influence their decision of where to study, and this was even higher among Nigerian (56%), Chinese (70%), Ghanaian (50%) and Sri Lankan (51%) respondents.
- The influence of parents is higher than the average among International Foundation Year (58%) and International Year Two in Business Management (50%) students.

Who, if anyone, is/are the greatest influence on your decision on where to study internationally?

	Grand Total (n=951)	Nigeria (n=181)	China (n=145)	Pakistan (n=86)	Kenya (n=71)	Peru (n=47)	Ghana (n=38)	Sri Lanka (n=35)
Self	68.3%	66.9%	73.8%	68.6%	63.4%	70.2%	68.4%	65.7%
My Parents	49.3%	55.8%	70.3%	41.9%	36.6%	36.2%	50.0%	51.4%
Friends studying or living in another country	13.9%	13.8%	11.7%	10.5%	16.9%	19.1%	10.5%	22.9%
Family studying or living in another country	11.8%	14.4%	5.5%	16.3%	9.9%	14.9%	23.7%	11.4%
Friends in my home country	9.7%	8.8%	16.6%	4.7%	5.6%	10.6%	2.6%	11.4%
Career advisor / school counsellor	9.3%	11.6%	6.2%	11.6%	15.5%	4.3%	10.5%	5.7%
NCUK staff	8.7%	6.6%	2.8%	18.6%	15.5%	8.5%	13.2%	17.1%
Teacher at school	7.6%	3.9%	10.3%	4.7%	11.3%	8.5%	5.3%	
NCUK alumni	7.0%	12.2%	6.9%	11.6%	1.4%	6.4%	10.5%	2.9%
News/media outlets	6.9%	10.5%	4.1%	3.5%	8.5%	4.3%	2.6%	

Greatest influence on what programme to study internationally

Similarly, a vast majority of the respondents select their programme of study themselves

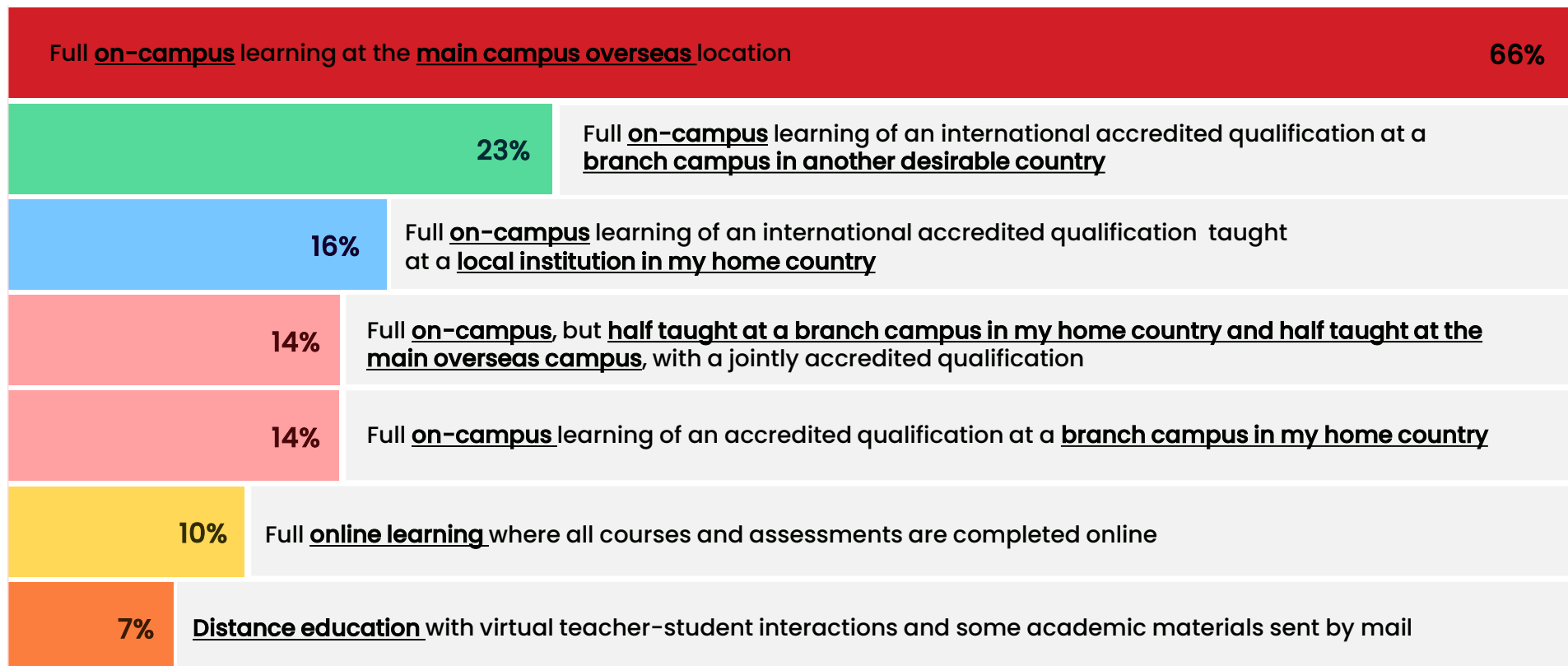
- Similarly, in terms of influences on what programme to study internationally, a significant majority (80%) noted they made this decision themselves. This is even higher among Nigerians (88%) and Ghanaians (90%).
- Parents are the second greatest influence, as indicated by a 40% overall. Source markets with a higher proportion include Nigeria (46%) and China (56%). By qualification type, those who studied/are planning to study an International Foundation Year programme recorded the highest influence from parents (46%). However, it must be noted that for all qualification types, 'self' was still the most voted choice.

And who had the greatest influence on your decision on what programme to study internationally?

	Grand Total (n=951)	Nigeria (n=181)	China (n=145)	Pakistan (n=86)	Kenya (n=71)	Peru (n=47)	Ghana (n=38)	Sri Lanka (n=35)
Self	80.1%	88.3%	76.4%	70.6%	80.0%	77.8%	89.5%	80.0%
My Parents	40.0%	45.8%	53.5%	38.8%	27.1%	28.9%	36.8%	40.0%
Teacher at school	9.6%	6.7%	13.2%	8.2%	15.7%	6.7%	5.3%	2.9%
Career advisor / school counsellor	9.3%	8.9%	9.0%	16.5%	14.3%	11.1%	5.3%	8.6%
NCUK staff	6.9%	4.5%	2.1%	12.9%	4.3%	11.1%	7.9%	17.1%
Friends in my home country	6.8%	2.8%	13.9%	9.4%	5.7%	4.4%		11.4%
Friends studying or living in another country	6.8%	6.7%	5.6%	8.2%	7.1%	6.7%	5.3%	17.1%
Education agent	6.3%	5.6%	9.7%	4.7%	5.7%	6.7%		
Other family in my home country	6.3%	7.8%	6.3%	9.4%	1.4%	2.2%	2.6%	11.4%
News/media outlets	5.7%	4.5%	7.6%	1.2%	4.3%	4.4%	5.3%	2.9%

Preferred learning experiences

Two out of three respondents still favour learning fully on-campus at institutions' main overseas campuses



Preferred learning experiences

Two out of three respondents still favour learning fully on-campus at institutions' main overseas campuses

Two-thirds of respondents (66%) selected **full on-campus learning at the main overseas campus** as their preferred type of learning experience. This is also the top option across all top-responding source markets

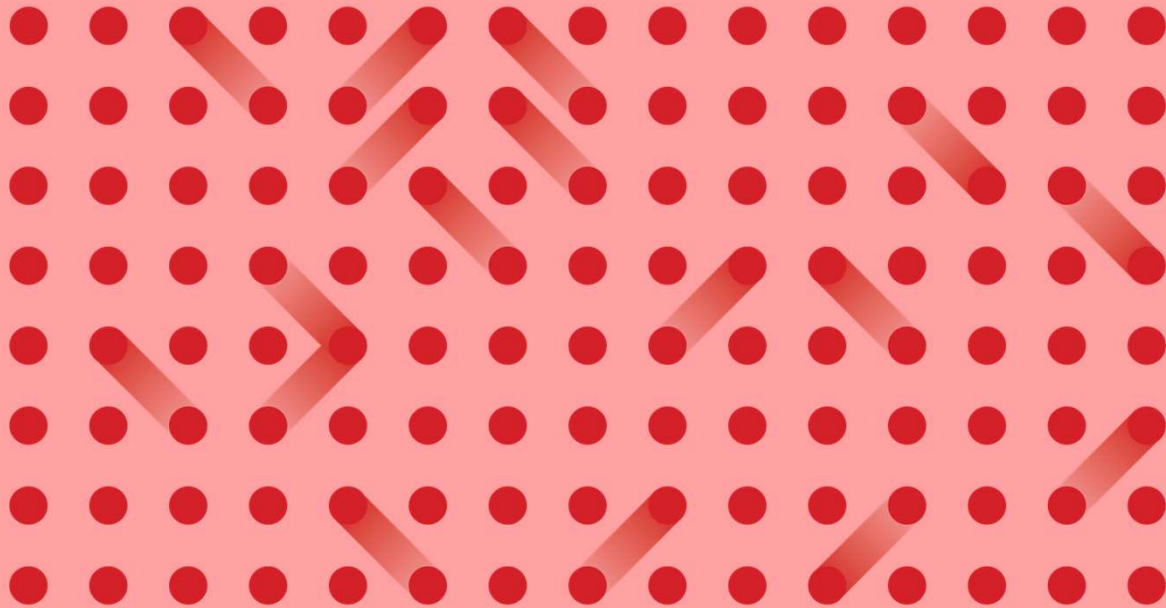
Contrastingly, the least popular option is **distance education with virtual teacher-student interactions and some academic materials sent by mail**, which was selected only by 7% of the respondents

The second most popular alternative (23%) is also a **full-on campus learning of an international qualification, but at a branch campus in another desirable country**, and it is followed by a similar option in a **local institution at the respondents' home country** (16%)

Interestingly, looking at **China** specifically, full on-campus learning of an international accredited qualification taught at a local institution in their home country is more popular than in any other top source market, with 40% selecting this

Meanwhile, respondents from **Sri Lanka** also consider full-on campus learning of an international accredited qualification at a branch campus in their home country (47%)

Destination Policy



3

The state of international student policies in 2024

Student policy and government sentiment are crucial factors for students international

Australia

- From January 1, 2025, a proposed total cap of 270,000 new international students will be in place across Australia for the year
- Additional regulations to be legislated in Oct & Nov
- Student Financial requirements increased to A\$29,710
- Student visa application fee increased by 125% as of July 1, 2024

Canada

- Available funds requirement doubled to CAN\$20K+
- Cap on new int'l students reduced further, by 10% for 2025 & 2026. This will include master's and doctoral students
- From Feb 15, 24, changes to PGWP eligibility. Master's programs under 2 years may be eligible for 3-year PGWP
- From Oct 1, 24, college graduates no longer eligible for a PGWP unless their study is an area of high labour demand

UK

- Rising visa costs, IHS costs and salary thresholds make study/post-study stays less accessible
- Immigration policy changes have made the UK appear less welcoming, but the new government states that international students are 'very welcome'
- UK government commits to the Graduate visa

USA

- Calls for US government to introduce an international education strategy
- Increased capacity for visa processing in India
- PSW rights in the US still seen as unappealing.
- Presidential election to take place in November 2024

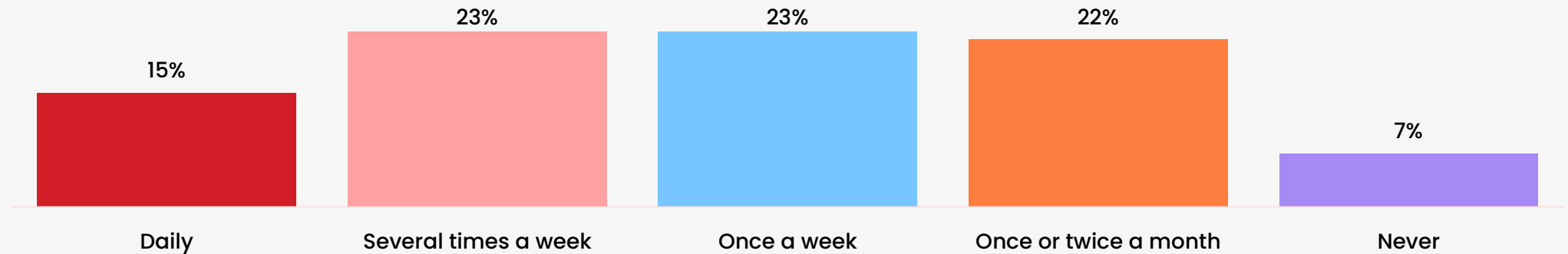
News and politics following

Seven out of ten respondents follow-up on news about their destinations at least once a week

- Most students actively keep up with political events and issues in their destination country, reflecting a strong interest in understanding the social and political climate around them. Notably, 33% engage with the news several times a week, and 23% do so weekly, suggesting a consistent effort to stay informed

- Interestingly, students whose preferred destination is the USA are more likely to follow the news daily compared to other countries. In contrast, a higher percentage of students whose preferred destination is Australia (16%) report never following political news, a significantly larger proportion than those bound for other destinations. This variation suggests differing levels of political engagement and information-seeking behaviour, potentially influenced by the unique political climates and media environments of these countries

How often do you follow news about political events and issues in your destination country?

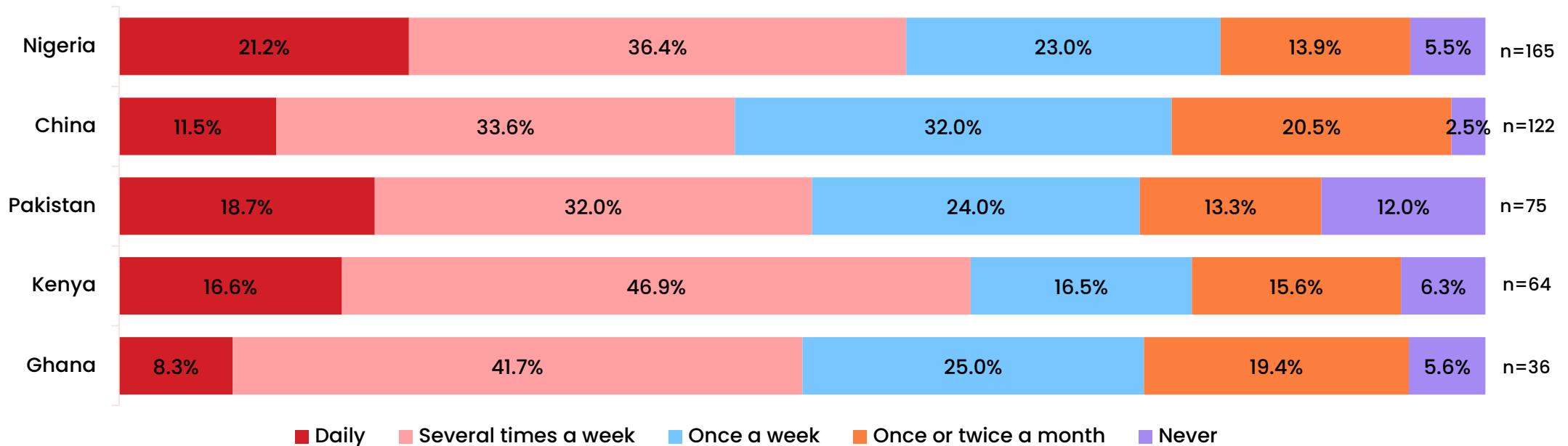


News and politics following (by source market)

Nigerians, Pakistanis and Kenyans among those following news most often

- At the source market level, students from Nigeria (21%), Pakistan (19%), and Kenya (18%) follow political news daily, surpassing the global average (15%). Interestingly, while Pakistani students show strong engagement at the daily level, a larger proportion (12%) also report never following political news, significantly higher than the global average of 7%

How often do you follow news about political events and issues in your destination country?

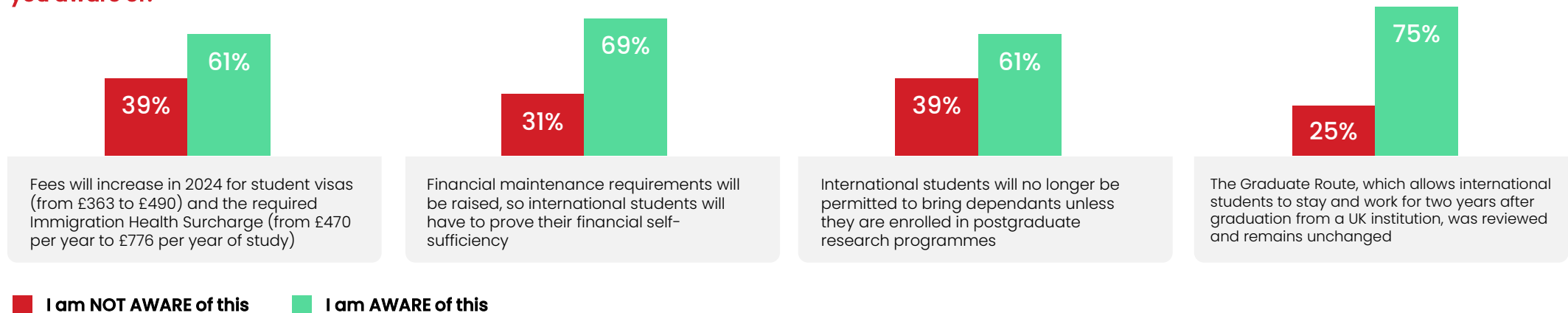


Awareness of UK policies

Awareness is high for most UK recent policy updates

- Most students who prefer the UK as their destination are well-informed about recent policy changes. Notably, 75% are aware that the Graduate Route remains unchanged, demonstrating a strong awareness of this key aspect. Back in March 2024, when the Graduate Route was set to be reviewed, previous IDP research (Emerging Futures 5) found that awareness of that review happening was lower (64%) among pathway students
- With 91% awareness of the graduate route update, Kenyan¹ students demonstrate the highest level of knowledge about this crucial policy among all source markets
- Nearly seven out of ten (69%) students reported being informed about the increase in financial maintenance requirements. However, fewer students are aware of changes such as the increase in student visa fees (61%) and the restrictions on bringing dependants (61%), indicating that these specific updates may not be as widely communicated or understood compared to other policy changes

The UK government announced some policy updates that will take effect from January 2024 up to early 2025. Which of the following updates are you aware of?



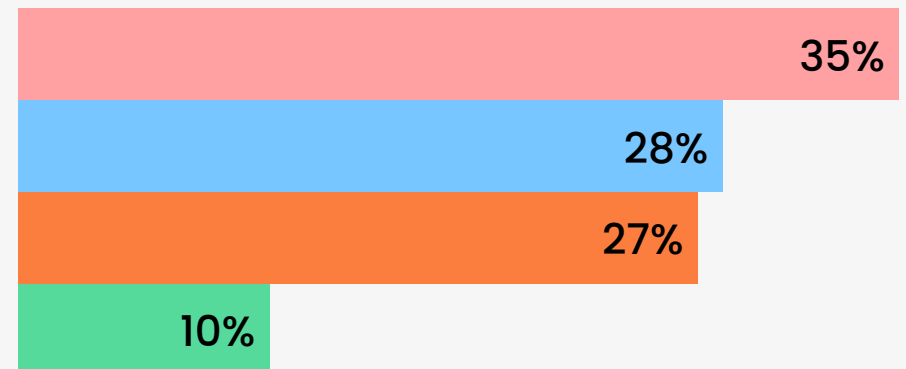
Impact of UK policies

Finance-related policies are a key focus for most students choosing the UK

- Across all source markets, most students considered **finance-related policies to be the most influential** for future students' decision-making:
 - Fees will increase in 2024 for student visas and the required Immigration Health Surcharge (35%)
 - Financial maintenance requirements will be raised, so international students will have to prove their financial self-sufficiency (28%)
- This trend is also observed in some main source markets, including **Nigeria, Kenya, Pakistan, and Peru**
- In comparison, **Chinese students** are more concerned about post-graduation opportunities to stay/work in the UK. The majority chose the following policy as the most impactful:
 - The Graduate Route, which allows international students to stay and work for two years after graduation from a UK institution, was reviewed and remains unchanged (44%)

Which of these policy updates will have the most significant impact to future students' decision to choose the destination?

- Fees will increase in 2024 for Student visas (from £363 to £490) and the required Immigration Health Surcharge (from £470 per year to £776 per year of study)
- Financial maintenance requirements will be raised, so international students will have to prove their financial self-sufficiency
- The Graduate Route, which allows international students to stay and work for two years after graduation from a UK institution, was reviewed and remains unchanged
- International students will no longer be permitted to bring dependents unless they are enrolled in postgraduate research programmes

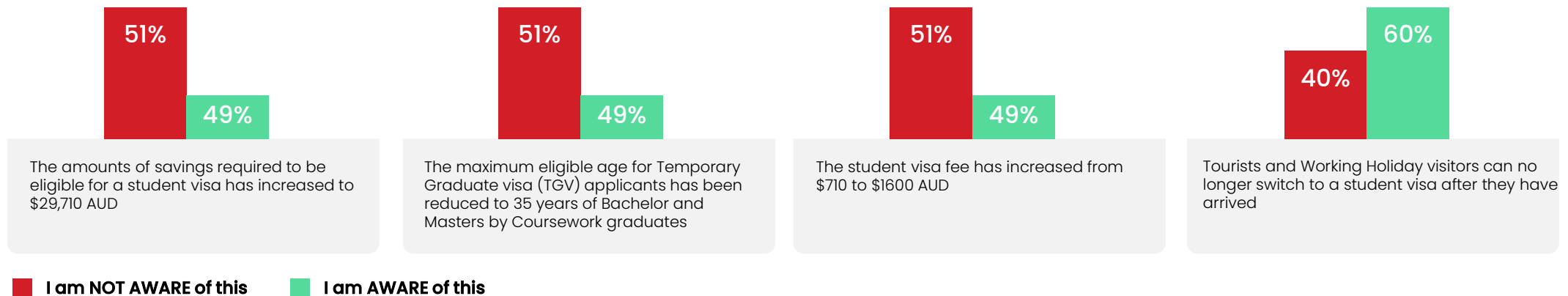


Awareness of Australian policies

A majority are not aware of three of the four policy updates presented

- Students whose preferred destination is Australia (only 4% of the total respondents) show relatively high awareness (60%) of the recent change to student visa policies, specifically the restriction preventing tourists and holiday visitors from switching to student visas after arrival
- However, for other policy changes, awareness is more evenly divided, with roughly half of the students being informed while the other half remain unaware. Previous IDP research (Emerging Futures 5, March 2024) also explored awareness of some of these policies as they were announced. At that time, the amount of savings required to be eligible for a student visa increased to \$24,505 AUD and awareness of this increase was higher (55%) among pathway students. Similarly, awareness of reductions to the maximum eligible age for a Temporary Graduate visa, specifically among pathway students, was higher at 63%. This suggests that while certain policy updates are well-known, others may require more targeted communication to reach all students

The Australian government announced some policy updates effective in 2024. Which of the following updates are you aware of?



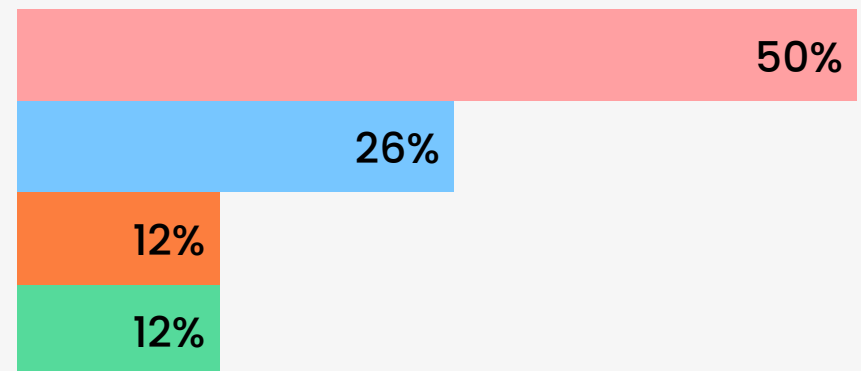
Impact of Australian policies

Higher financial requirements and visa fees are the most impactful for students choosing Australia

- Regarding the impact of Australian policies, we collected responses from 34 students who chose Australia as their preferred destination
- Among these students, **finance-related policies are also considered the most influential** for future students' decision-making regarding their destinations, with most students selecting the following policies:
 - The amount of savings required to be eligible for a student visa has increased to \$29,710 AUD (50%)
 - The student visa fee has increased from \$710 to \$1600 AUD (26%)

Which of these policy updates will have the most significant impact to future students' decision to choose the destination?

- The amount of savings required to be eligible for a student visa has increased to \$29,710 AUD
- The student visa fee has increased from \$710 to \$1600 AUD
- The maximum eligible age for Temporary Graduate visa (TGV) applicants has been reduced to 35 years for Bachelor and Masters by Coursework graduates
- Tourists and Working Holiday visitors can no longer switch to a student visa after they have arrived



Awareness of Canadian policies

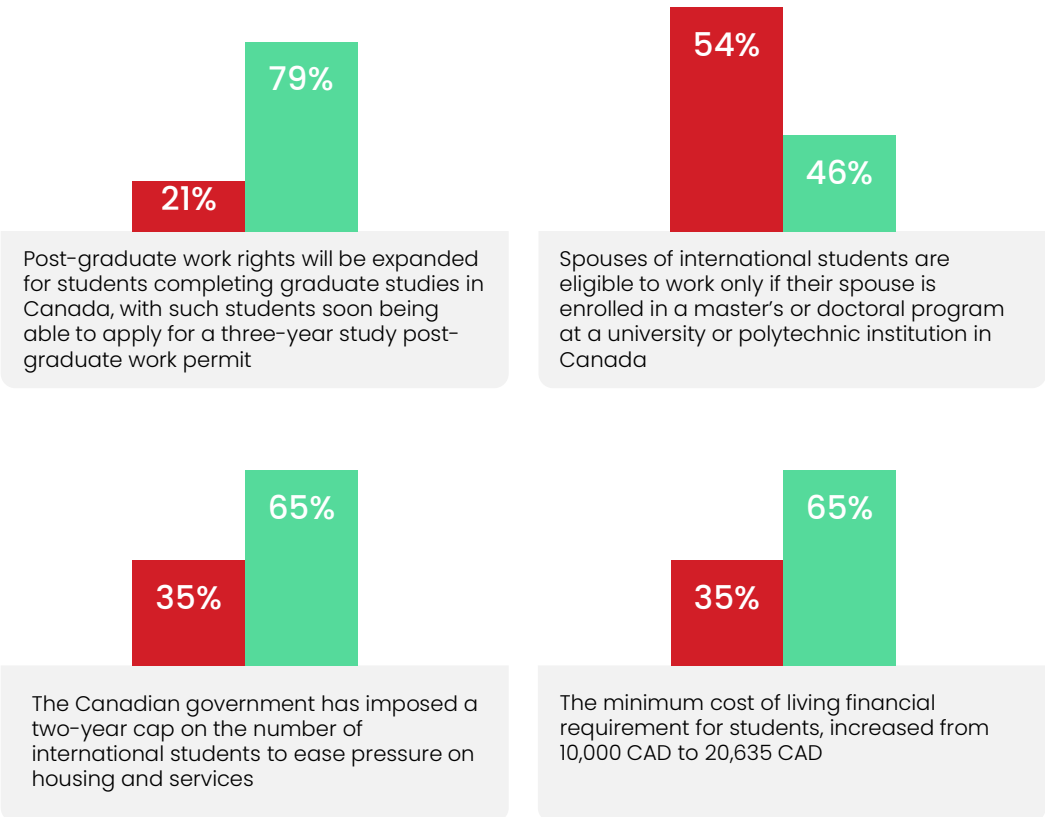
Awareness is the highest for policies related to caps and post-graduate work rights

- Nearly eight in ten (79%) students whose preferred destination is Canada (only 6% of the total respondents) are well informed about the changes to post-graduate work rights, making this one of the most widely recognised policy updates announced by the Canadian government. Additionally, over two-thirds (65%) are aware of the two-year cap on post-study work permits and the increased financial requirements related to the cost of living
- However, there is comparatively lower awareness regarding spousal work conditions and the post-study work restrictions for students enrolled in courses delivered through public-private partnerships (PPPs). On the latter, awareness is significantly lower than that seen in previous IDP research (Emerging Futures 5, March 2024), where 59% of the respondents declared to know about

The Canadian government announced some policy updates effective on 1 January 2024. Which of the following updates are you aware of?

■ I am NOT AWARE of this

■ I am AWARE of this



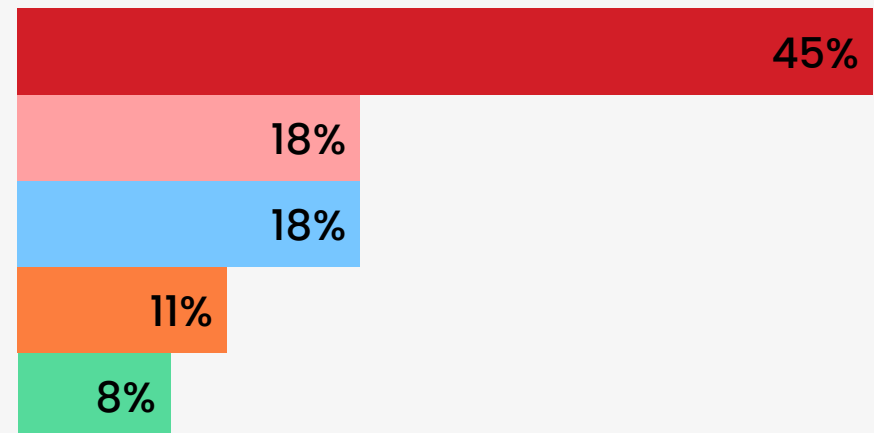
Impact of Canadian policies

The rise in financial requirements is the most significant policy affecting future students

- Regarding the impact of Canadian policies, we collected responses from 51 students who chose Canada as their preferred destination
- Among these students, the increase in **financial requirements is considered the most influential** policy affecting future students' decision-making regarding their destinations, with most students selecting this policy:
 - The minimum cost of living financial requirement for students increased from 10,000 CAD to 20,635 CAD (45%)
- The cap on international students (18%) and post-graduate work permits (18%) are less impactful compared to the higher financial requirements

Which of these policy updates will have the most significant impact to future students' decision to choose the destination?

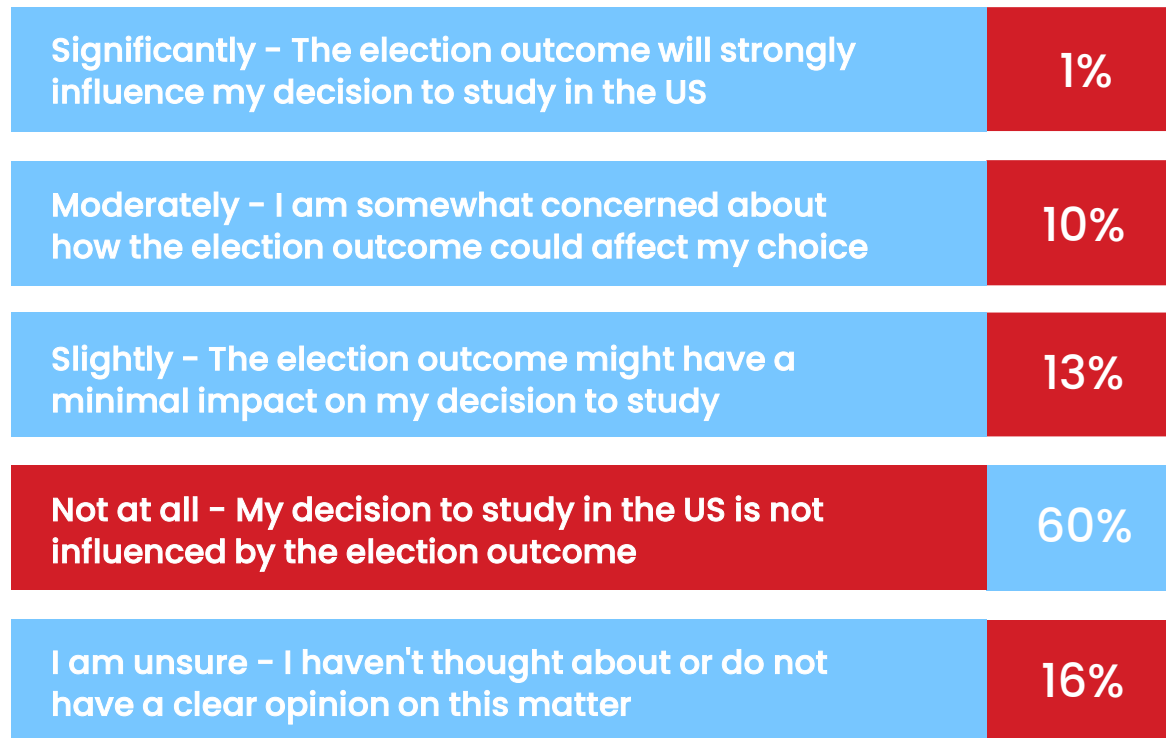
- The minimum cost of living financial requirement for students, increased from 10,000 CAD to 20,635 CAD
- The Canadian government has imposed a two-year cap on the number of international students to ease pressure on housing and services
- Post-graduate work rights will be expanded for students completing graduate studies in Canada, with such students soon being able to apply for a three-year post-graduate work permit
- Students enrolled in programmes delivered via public-private partnerships (PPPs) will no longer be eligible for post-graduate work permits
- Spouses of international students are eligible to work only if their spouse is enrolled in a master's or doctoral program at a university or polytechnic institution in Canada



Impact of US election

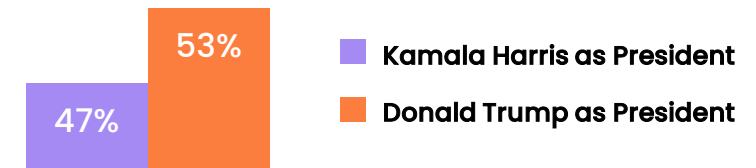
Most African and Asian students will still choose the US regardless of the election outcome

There is a presidential election happening in the US in November 2024. How much would the election outcome influence your decision to study in the US?



Cohort: All students whose preferred destination is the US; Note: sample size for this question is n=62

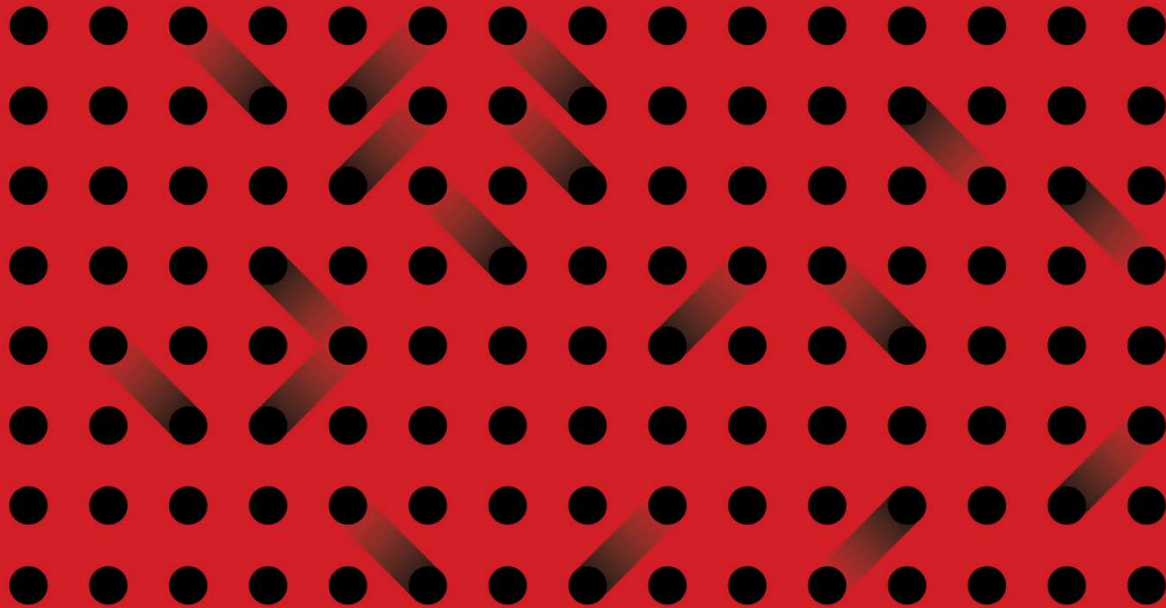
Which of the following statements demonstrates your preferred election outcome?



- Regarding the US presidential election, we collected responses from 62 students who chose the US as their preferred destination (7% of the total responses), primarily from Africa or Asia
- Among these students, **a majority (60%) believe the election outcome would not influence their decision to study in the US**, while 16% are unsure of its impact
- 23% think the election outcome will moderately or slightly affect their choices to study in the US
- There is no significant difference in the preference for election outcomes, with slightly more students (53%) choosing Donald Trump. IDP's US pre-election research (conducted in September 2024) also found a very similar split between the two candidates; however, Kamala Harris recorded a slightly higher preference (51%) among pathway students

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Post-study plans



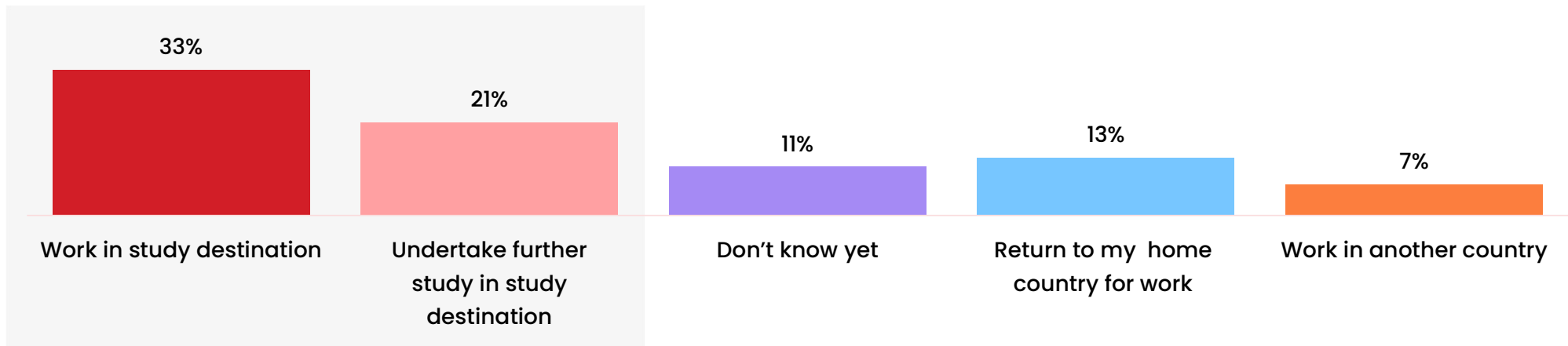
4

Post-study plans

Over half of the respondents plan to stay in their study destination after completing education

- A significant portion of international students view their study destination as a long-term option, either for professional development or continued academic advancement
- Over half of the surveyed students expressed a desire to remain in their study destination after completing their education. Of this group, 33% plan to seek employment in the destination country, while 21% aim to pursue further studies. On the other hand, around 18% of students intend to return to their home country, either to work (13%) or to continue their education (5%)

What do you intend to do, or did you do, after completing your international education?



Note: only top responses are shown; Cohort: All

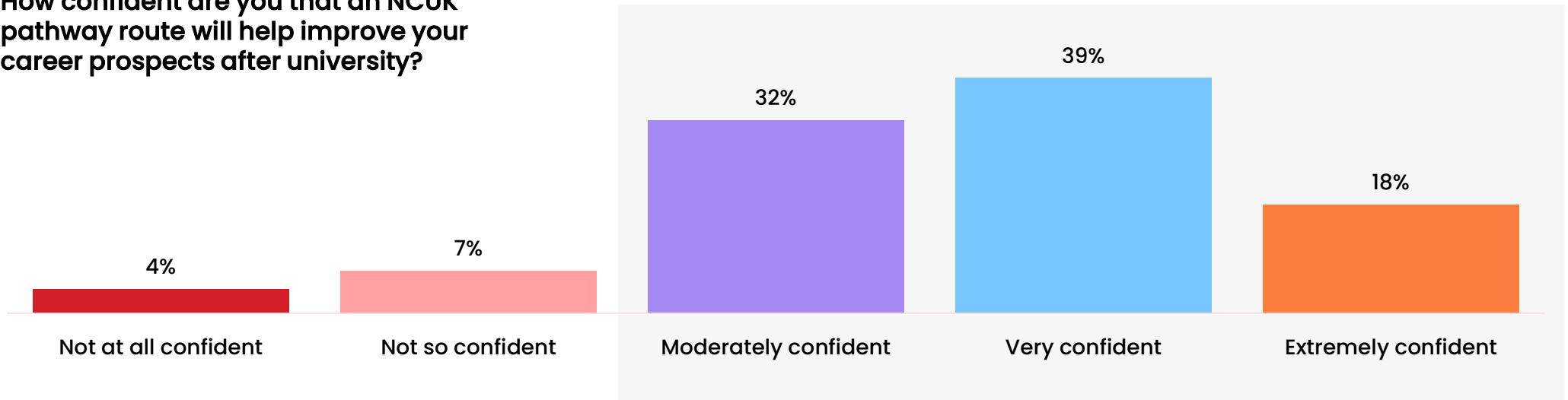
Career prospects after university



Majority of respondents express strong confidence that NCUK pathways will boost their career prospects

Globally, nearly nine out of ten students (89%) express confidence in the NCUK pathway and its ability to enhance their career prospects. Of these, 39% reported being "very confident," while 32% described themselves as "moderately confident"

How confident are you that an NCUK pathway route will help improve your career prospects after university?



Cohort: All except former NCUK students who did not go on to university

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