SNAPSHOT REPORT ON

INTERNATIONAL ADMISSIONS 2022–2023

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INTRODUCTION

What will the 2022–2023 academic year bring when it comes to international student admissions and enrolment across the European Higher Education Area (EHEA)? There are both quantitative and qualitative dimensions to this fundamental question, as well as important ramifications for multiple stakeholders. From the higher education institutions that enrol them and the local and national communities that host them, to the providers that offer accommodation and other key student services, various actors have an interest in understanding the possible evolution in international (degree-seeking) student numbers.

An exploration of this topic is highly meaningful in the first quarter of 2022. In any given year, this is a period in the student recruitment and application cycle in which indications of trends may be coming into focus. In 2022, specifically, this has been a time of both enthusiasm and caution for the international higher education community in Europe. In March of this year, the world observed the second anniversary of the global COVID-19 pandemic, whose effects have generated massive disruptions to higher education since 2020. In a sign of potential recovery, recorded cases of the disease were trending downward in the first three months of 2022 in Europe and around the world (World Health Organization, 2022), and many European countries dropped rules governing masks, public limitations and health pass requirements (*Euronews*, 2022a, 2022b, 2022c). Signs of optimism in one area have been overshadowed by devastating developments elsewhere, however. Russia invaded Ukraine in late February, wreaking havoc on an established higher education system, displacing an estimated 4.2 million people by early April 2022 (UNHCR, 2022), and introducing shocks into the global economy (OECD, 2022).

Against this complicated and fluid backdrop, the EAIE administered a short online survey between 15 and 24 March 2022, seeking a quick and current indication of international student enrolment and application dynamics at higher education institutions (HEIs) within the EHEA. The survey also asked respondents to provide some indications of how the war in Ukraine might affect their approach to handling applications from Ukrainian students and any expected changes in Ukrainian student enrolments at their institutions.

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Respondent countries

Responses were received from 218 individuals representing higher education institutions in 33 of the 49 countries included in the EHEA. Survey fatigue and the short window of opportunity to complete the survey may account for this inexhaustive data set. Even still, the responses offer insights from a geographically, culturally and linguistically diverse range of institutions, of varying types and student population sizes. Collectively, the data provides perspectives from 67% of the countries in the EHEA, and altogether respondents' institutions enrol a total of nearly 3.1 million students, close to 436,000 of whom are international students.

Figure 1

Survey respondents by country *(n=218)*

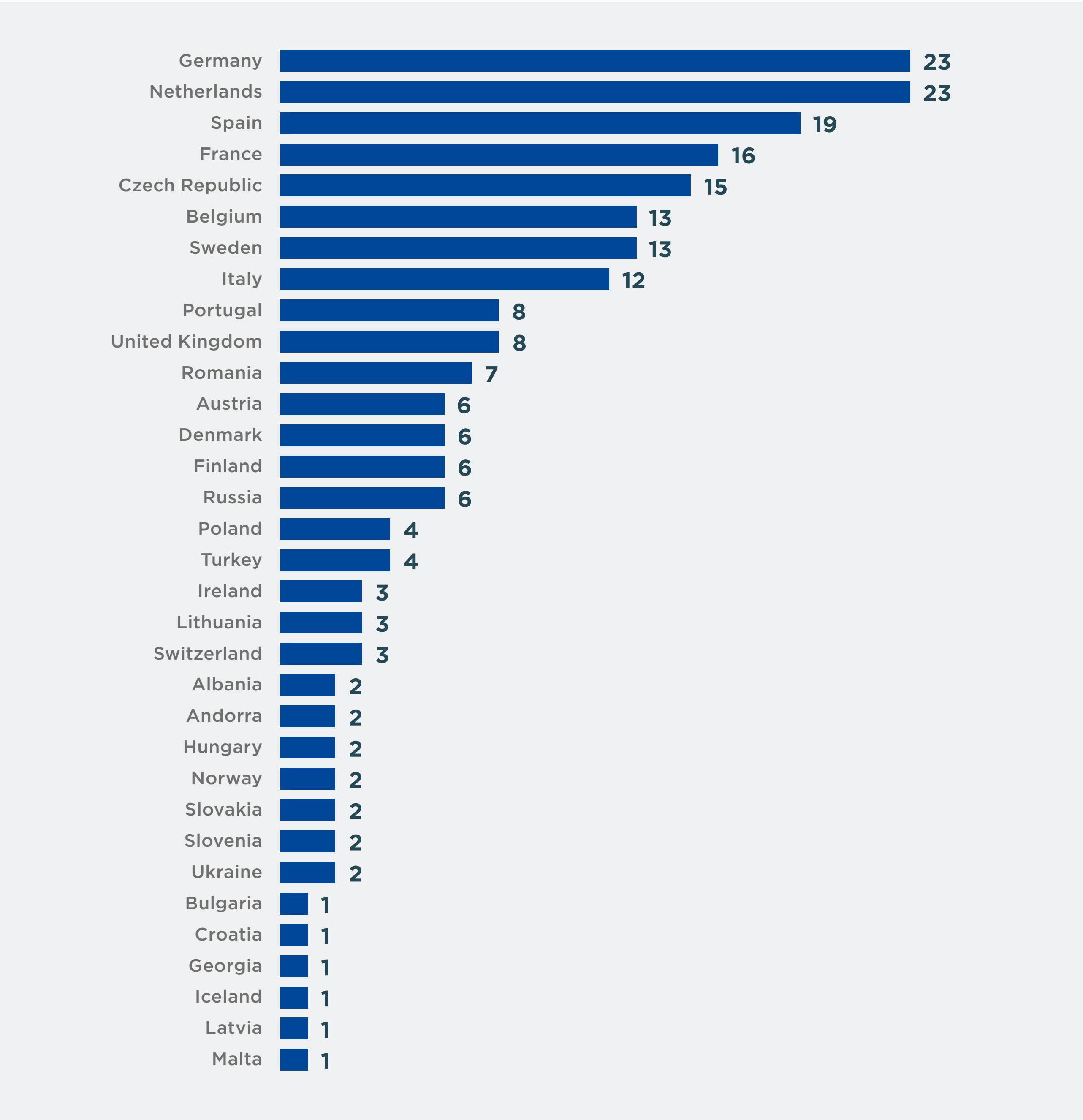
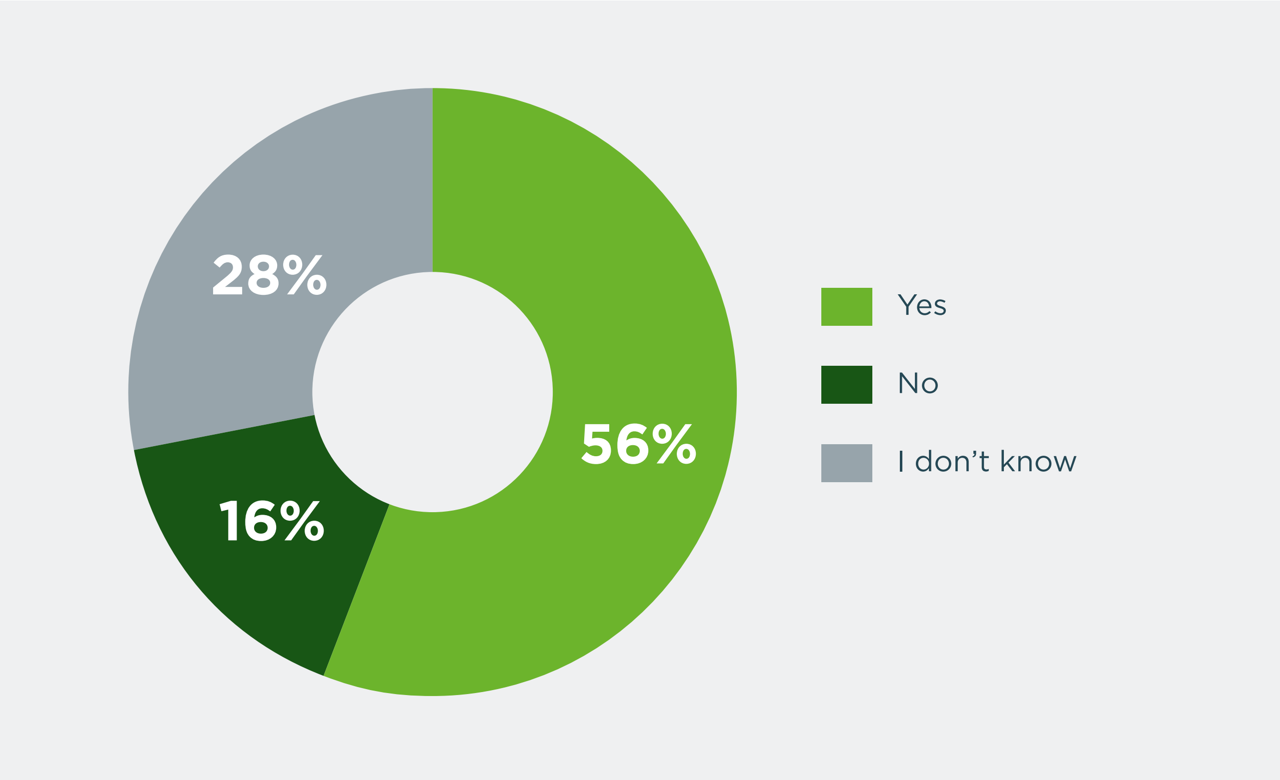


Figure 2

Are your institution's trends in international student applications and enrolments similar to those of other institutions in your country? *(n=177)*



Particularly when a data set is inexhaustive, it is important to be cautious about generalising findings to a wider population. In this sense, it is interesting to note that a majority of respondents to this survey exercise (56%) felt that what they are seeing with respect to international student applications and enrolments for the coming academic year at their own institution is consistent with the experiences of other HEIs in their same country. In the EAIE's 2021 snapshot report on international admissions, a smaller percentage of respondents (49%) indicated that they perceived this type of alignment. Meanwhile, while in 2021, 37% of respondents indicated they could not perceive one way or another if their institution's international student applications and enrolment outlooks for the next academic year were similar or not to others', in this 2022 snapshot survey a smaller proportion of the respondents (28%) expressed this uncertainty.

Applications

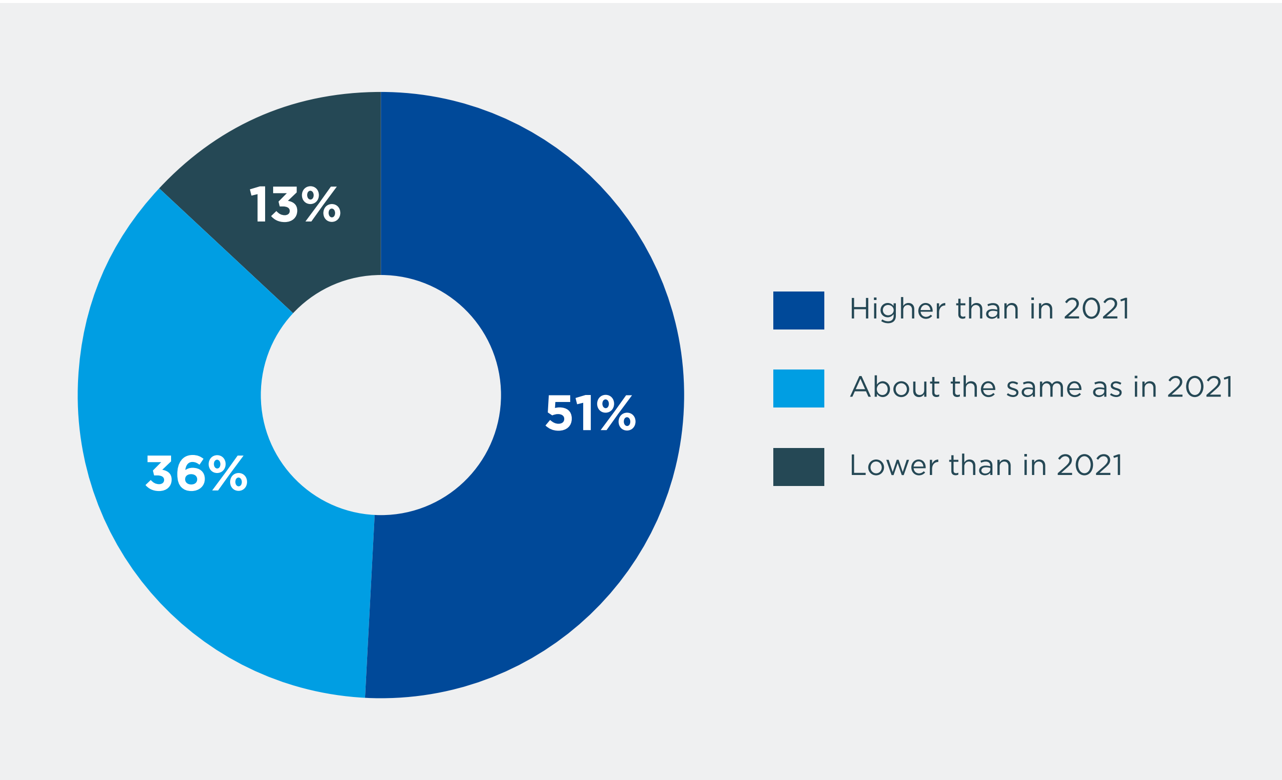
In what could be construed as a sign of recovery, or at least some stabilisation, 87% of respondents reported receiving similar or higher numbers of international student applications for 2022 than they had in 2021.

In terms of country-specific dynamics, increases in 2022 application numbers were reported by respondents from 27 of the 33 countries represented in the data. The six countries from which no respondent reported an increase in application numbers were Croatia, Denmark, Hungary, Iceland, Malta and Slovenia. Increases were most commonly reported by respondents at HEIs in Italy (10 out of 12), Portugal (6 out of 8), Romania (6 out of 7) and Finland (5 out of 6).

Respondents from 26 different countries indicated seeing similar application numbers for 2022 as they did in 2021. Per country, the largest proportions reporting relatively stable year-on-year application numbers were seen among the Czech (9 out of 15) and Swedish (8 out of 13) responses. Finally, institutions in 15 different countries reported receiving fewer applications from international students in 2022 than in 2021. The country most commonly reporting such decreases was Denmark (5 out of 6), with several respondents citing policy decisions by the Danish government restricting international student enrolments or English-taught programmes as reasons for these developments.

Figure 3

September 2022 intake: international student applications *(n=218)*



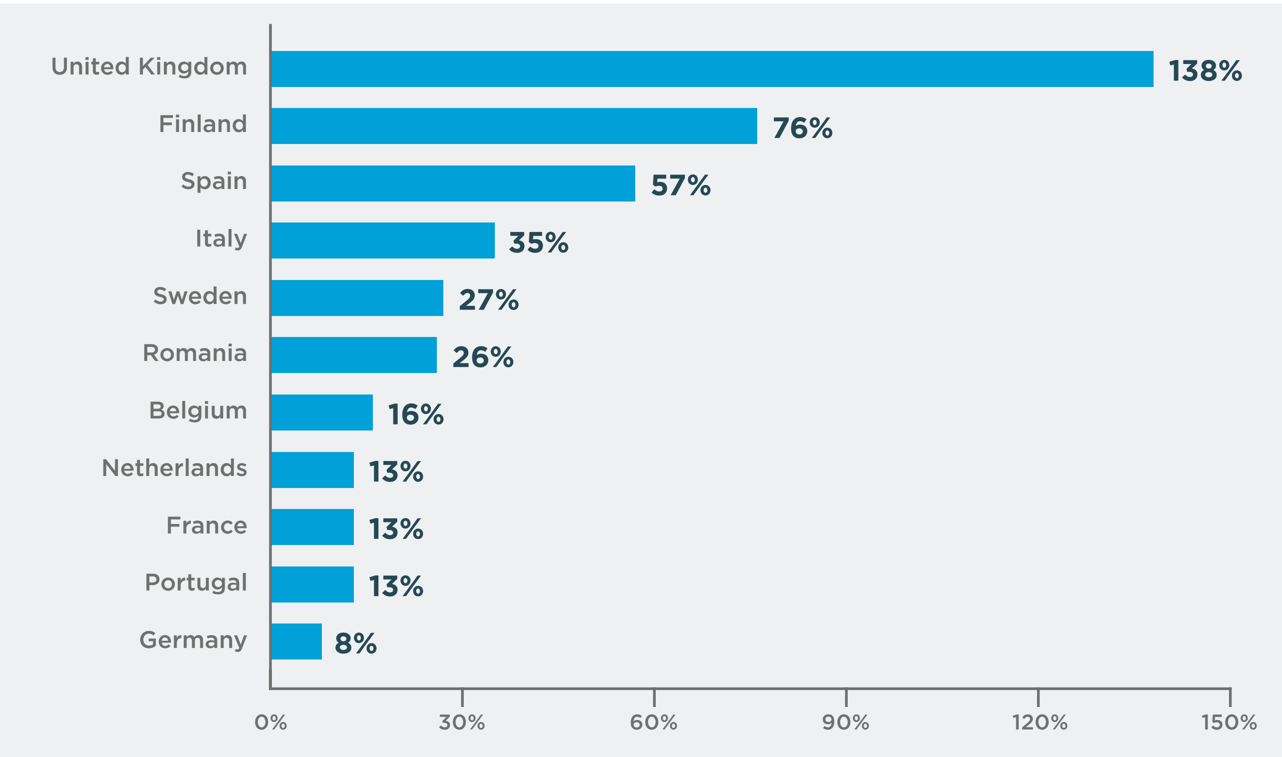
Although not all respondents who indicated an increase in application numbers for 2022 provided additional information about the approximate size of those increases, 94 respondents from 27 different countries did share those details. Figure 4 provides averages by country for those countries for which we received at least three responses to this question.

From amongst all of the responses to this question (not just those from countries providing at least three responses), the smallest reported increase was just 1% (from an HEI in Georgia), while the largest reported increase in application numbers was a whopping 400% (from an HEI in the UK). This very large percentage increase was attributed by this UK respondent to the fact that the institution had started from a relatively low application base, has an attractive fee policy and a reorganised international team more focused on marketing, and is benefitting from the introduction of the graduate student visa route, which they feel "has made the UK a more attractive study destination than previously". Without this outlier figure, the average increase in 2022 applications from amongst the other three UK HEIs that shared such information is around 50%, and the average reported increase from amongst all respondents was 27%.

Larger institutions in the respondent pool tended to report greater increases in application numbers. On average, HEIs with total student enrolments of fewer than 1000 students reported increases of around 15%, while HEIs with total student enrolments of 1000 – 9999 and 10,000+ reported, on average, increases in international student application numbers of 30% and 32%, respectively.

Figure 4

September 2022 intake: approximate increase in number of 2022 applications, as compared to 2021* *(n=71)*



* Country averages for countries from which at least three responses were received.

Enrolment

Data from the [EAIE's 2021 snapshot report on international admissions] showed that, while 40% of respondents had seen international student enrolments in 2020 that were lower than the year before, 53% of respondents anticipated 2021 international student enrolments to be higher than in 2020. Now in 2022, nearly three quarters of respondents (74%) reported that their 2021 international student enrolments matched or exceeded pre-pandemic levels.

Figure 5

September 2021 intake: international student enrolment *(n=202)*

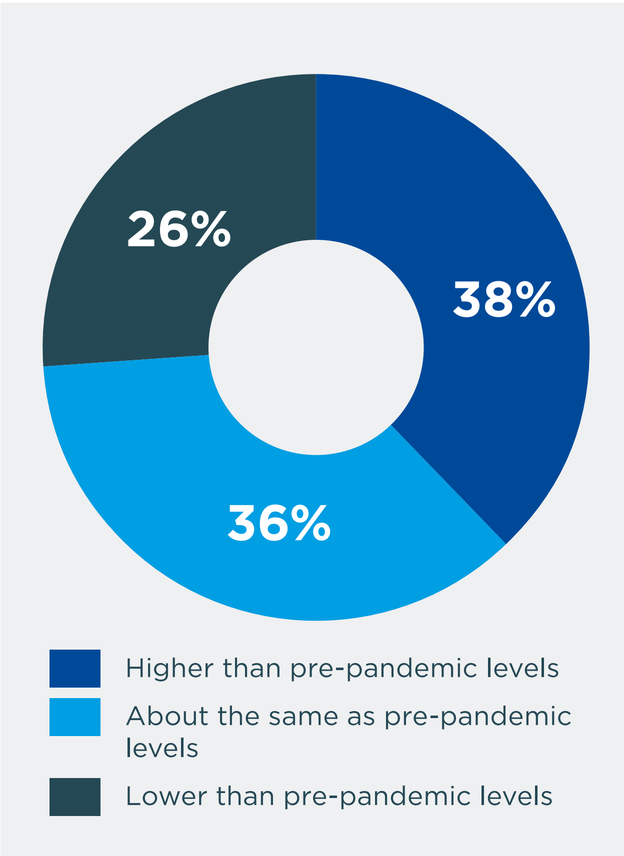
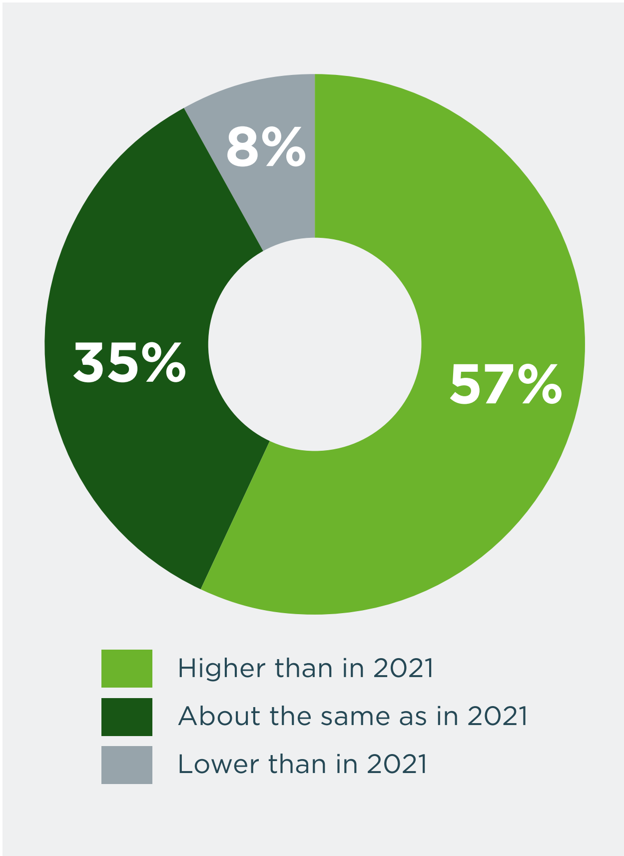


Figure 6

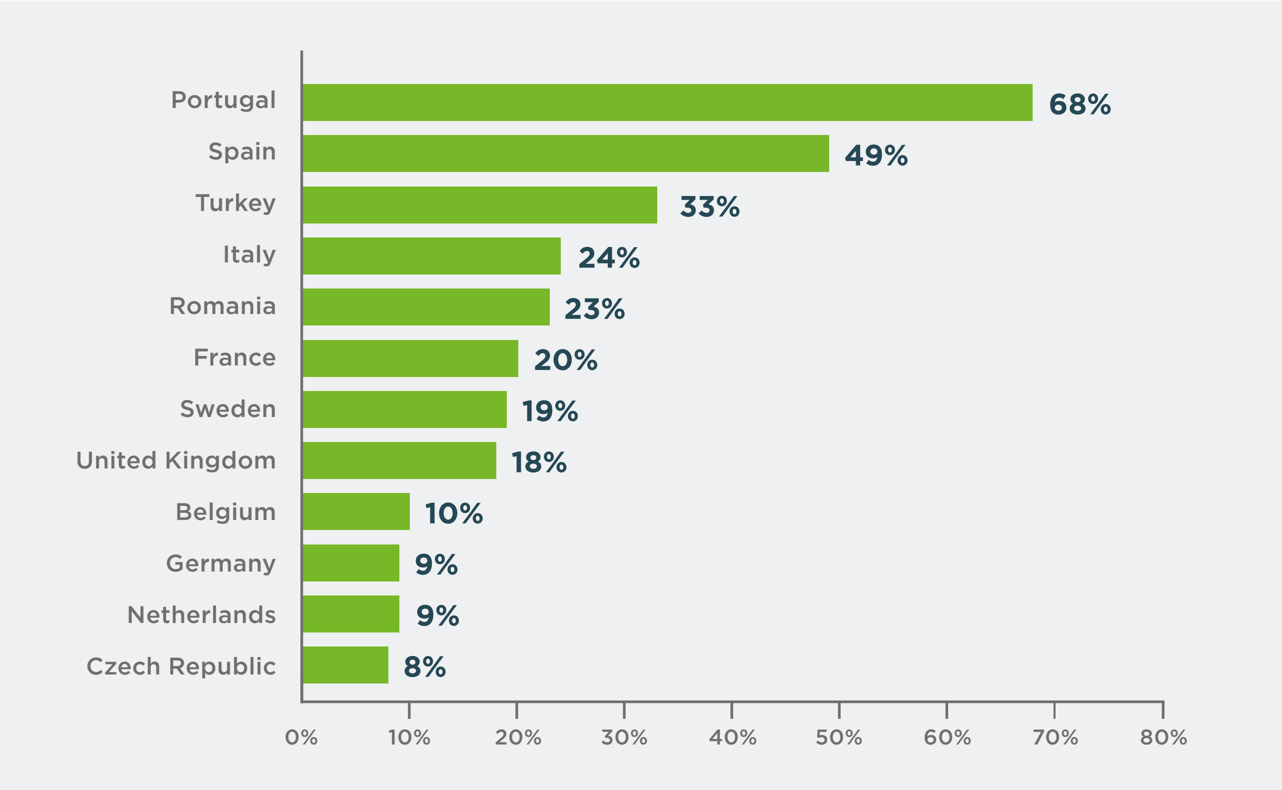
September 2022 intake: anticipated international student enrolment *(n=197)*



Optimism for the academic year ahead is evident in the fact that 92% of respondents expect their HEI's international student enrolments to meet or exceed those of 2021. Amongst the scant 8% anticipating decreased enrolments, responses were received from 11 different countries: including three each from Denmark and Russia, two from Austria, and one each from Belgium, Czech Republic, France, Italy, the Netherlands, Slovakia, Spain and Ukraine. Given Russia's increasing isolation as a result of the war in Ukraine, it is perhaps most notable that two Russian respondents anticipated enroling the same number of international students in the coming academic year.

Figure 7

Anticipated increase in 2022 international student enrolment, as compared to 2021* *(n=79)*



* Country averages for countries from which at least three responses were received.

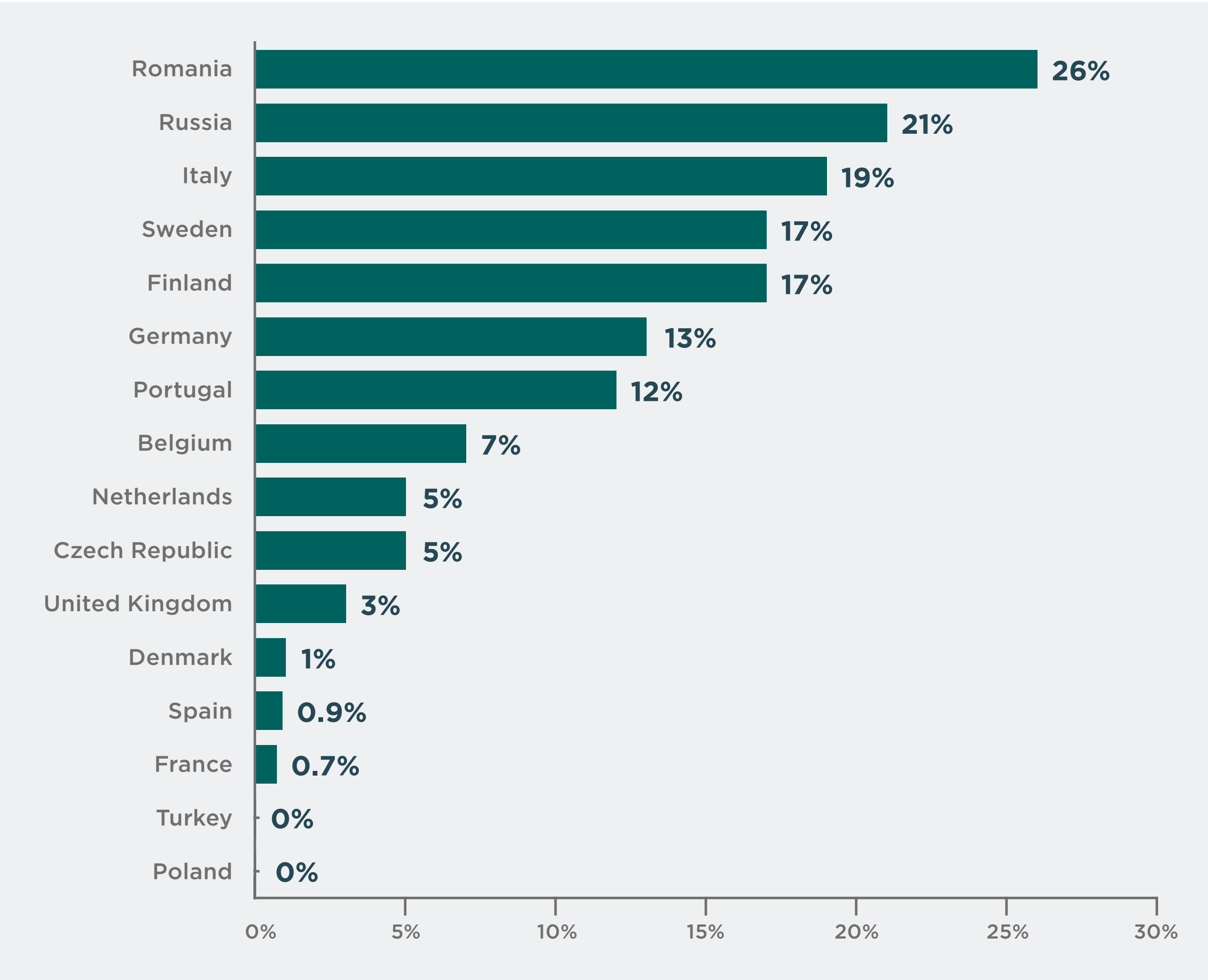
Figure 7 provides national average information for countries for which we received at least three responses to this question. More broadly, from amongst all institutions that offered an indication of the size of expected increase in their international student enrolments, the overall average was 23%. This is slightly lower than the overall average reported increase in international student applications to date for 2022. The optimism in regard to growing international student numbers for the coming academic year seems cautious. One quarter (25%) of the respondents who shared specific figures for their estimated 2022 international student enrolments anticipated increases over 2021 of approximately 10%, and 56% of respondents thought their enrolment increases will be on the order of 10% or less. A much smaller 15% of respondents indicated their enrolments could reach or exceed 30%.

Online study

The EAIE's 2021 snapshot report on international admissions found that, despite the many challenges to international travel presented by the COVID-19 pandemic, some 41% of respondents did not expect their institutions to offer the option of fully online study in 2021–2022. Reflecting on this option now in 2022, a solid majority (65%) of respondents indeed noted that none of the international students enroled at their institutions undertook fully online study in 2021–2022. Amongst the 35% of respondents whose institutions did see some proportion of their international students studying online, the overall average percentage of students engaged in this mode of education delivery was approximately 30%. Figure 8 provides national average information for countries for which we received at least three responses.

Figure 8

2021–2022 enroled international students: percentage who studied fully online*
(n=127)

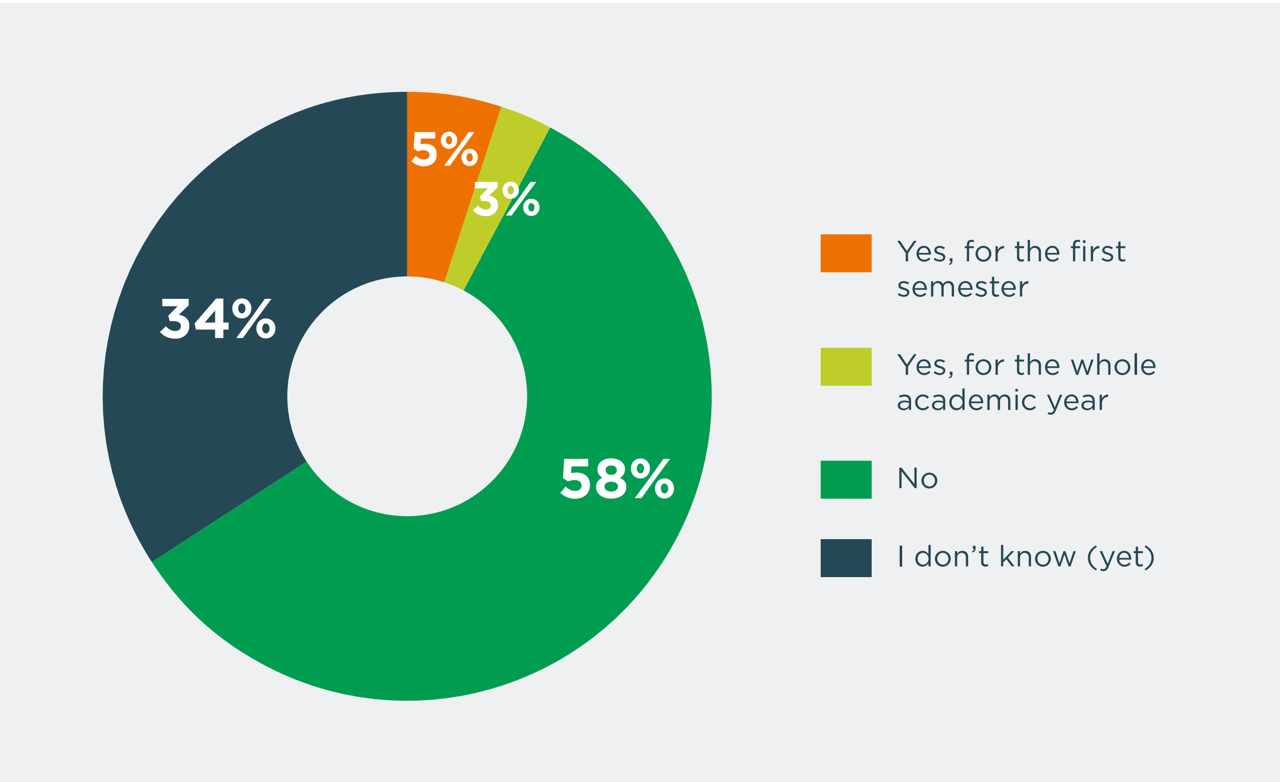


* Country averages for countries from which at least two responses were received.

Compared to findings from the EAIE 2021 snapshot report on international admissions regarding plans to offer some fully online study options for international students in 2021-2022, a larger majority of respondents in 2022 (58% versus 41% in 2021) indicated that this will not be the case at all for their institutions in the coming academic year, and much smaller percentages indicated a reliance on online study options for the first semester of 2022 (5% versus 17% in 2021). This is perhaps indicative of a sense of an end to the COVID-19 pandemic, or an indication of new kinds of planning for disruptive circumstances that may allow institutions to forego relying as heavily on online-only study options as they did in the previous academic year. In perfect alignment with the 2021 data, however, 34% of 2022 respondents do not yet know if their institutions will offer fully online study options in 2022–2023.

Figure 9

2022–2023 plans to offer fully online study *(n=187)*



Ukraine

The ongoing war in Ukraine has produced enormous damage to the higher education sector in the country, disrupted the educational experiences of students and created a refugee flow of more than four million displaced Ukrainians. This crisis has been a catalyst for a range of initiatives – at institutional, national and European levels – to provide support for Ukrainian higher education institutions, and notably to assist students in their efforts to continue studying. As seen in Figure 10, half of the survey respondents who engaged with this question anticipated seeing an increase in numbers of students from Ukraine at their institutions. Amongst these institutions, just two indicated they would not take extraordinary measures to ease the admission and recognition procedures for Ukrainian students (or other students displaced from Ukrainian universities) in 2022–2023. The vast majority (74%) indicated they will take some kind of extraordinary admission and recognition measures for this particular international student population.

The small number of institutions (17 in total) that indicated they expected to see decreases in students from Ukraine were located in 12 different countries, including four in Spain, two each in Denmark and Ukraine, and one each in Andorra, Belgium, Finland, Germany, Latvia, the Netherlands, Portugal, Russia and Sweden.

Figure 10

Anticipated changes in enrolment by Ukrainian students in 2022–2023 *(n=182)*

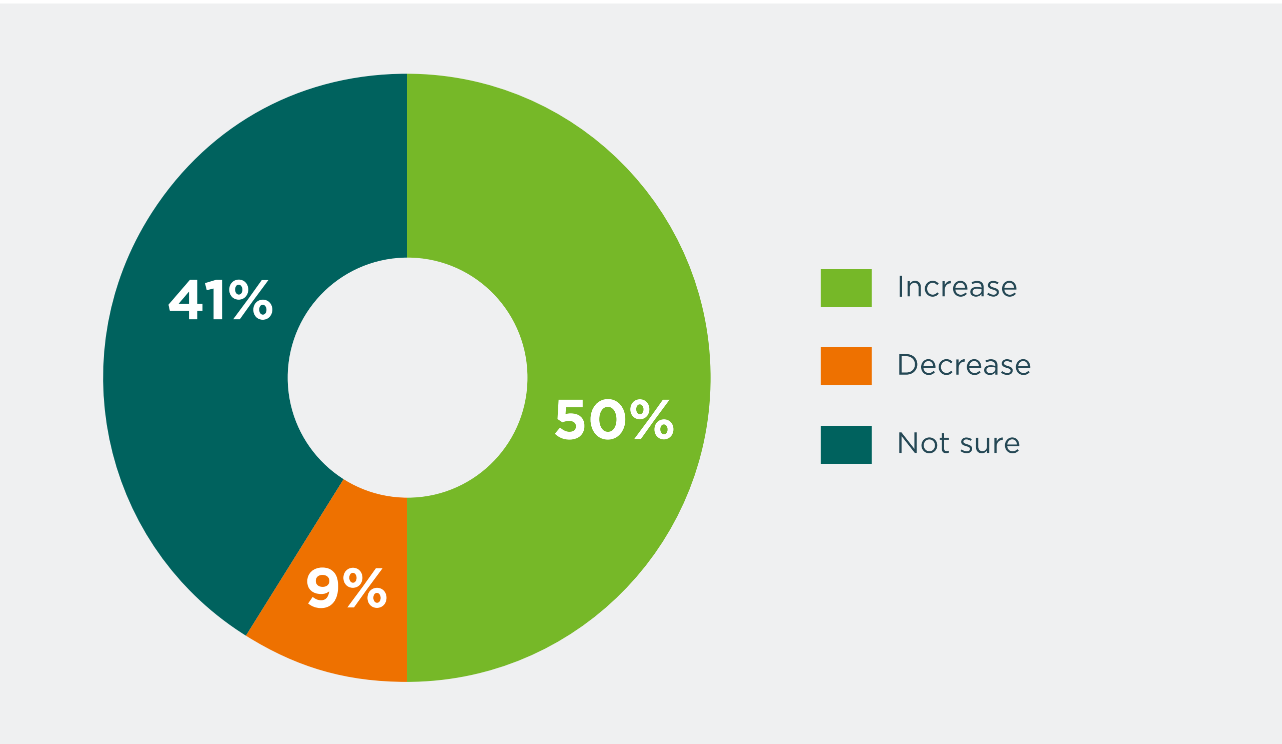
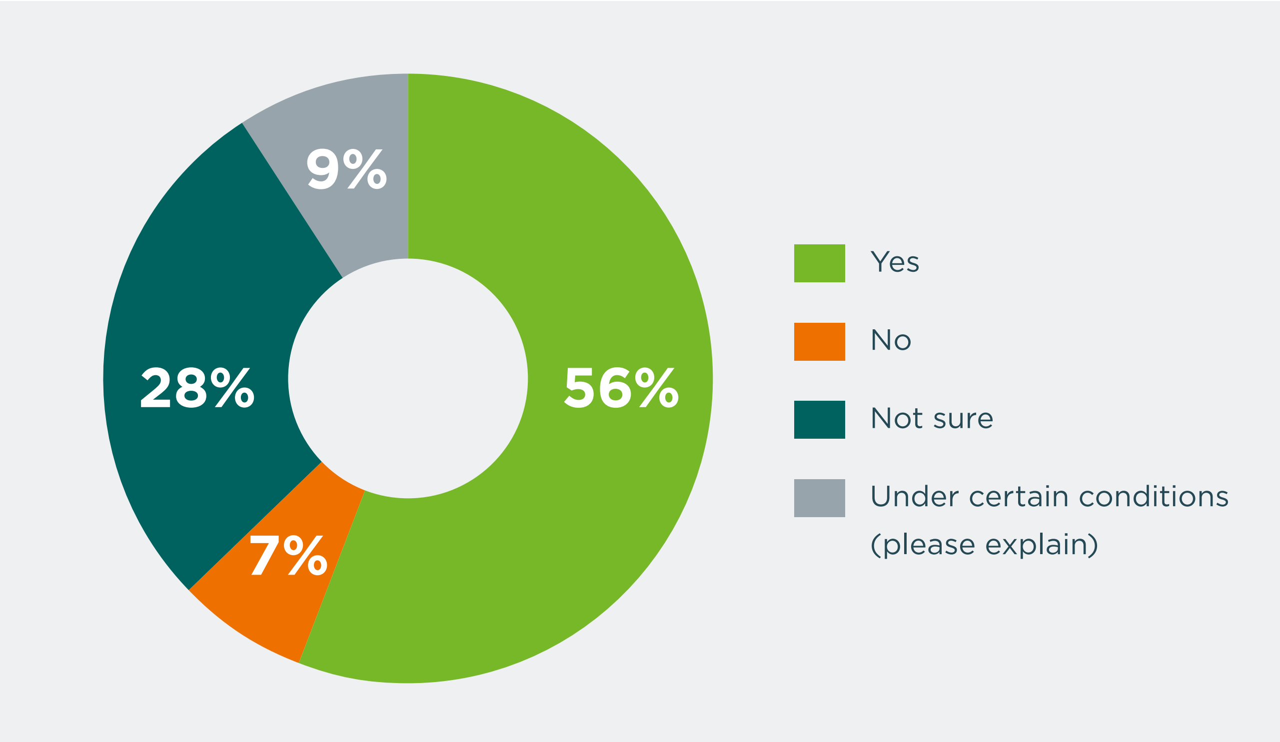


Figure 11

Easing of admission and recognition for Ukrainian students (or other students displaced by this crisis) *(n=181)*



Given the many sanctions being applied to Russia by the international community, our survey also queried respondents about whether or how the current war in Ukraine may be affecting their institution's approach to recruiting, admitting, and/or enroling Russian students. We received 74 usable responses to this open-ended question. More than half of these respondents (57%) indicated in their answers that Russian students would remain eligible for enrolment at their institutions, with multiple respondents taking pains to stress their institution's commitment to assessing the merits of students' applications regardless of nationality.

In their responses to this question, quite a number of respondents provided more than one perspective on their institution's actions and the current situation. So, while the majority of respondents indicated no changes in their willingness to admit and enrol qualified Russian students, 20% of the total responses also mentioned that their institutions had cut ties with institutional partners in Russia. Nearly one quarter (24%) of the answers spoke to the effects of external actors or circumstances on engagement with prospective Russian students or applicants. Quite a number couched their institution's positions in relation to their own government's directives with respect to Russia; others reflected on the realities Russian students themselves are currently facing when it comes to sitting for English language exams, acquiring visas or financing their educations abroad. About one-sixth (16%) of the responses mentioned active curtailment of recruitment activities or some form of restriction of Russian student enrolments.

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With the heaviest impact of the COVID-19 pandemic seemingly behind us, and at the same time the onset of a new deadly crisis disrupting lives and educational pursuits in Europe, this survey exercise provides a glimpse into a particular moment of transition in international higher education. A snapshot survey of this nature cannot answer all of the many questions we might have about the various aspects of international student admissions playing out across the EHEA at this time of both great challenge and great opportunity. Hopefully, however, it can provide useful indications of trends and issues that institutions can use for further reflection, planning, action and discourse.

For a comparison, download
Snapshot report on international admissions: autumn 2021

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