

# How is COVID-19 affecting international students' plans to study in the Netherlands in 2021?

28 April 2021

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## Main findings and considerations

A survey conducted between 9 and 24 March 2021, among 526 international respondents who are considering or at the point of studying at Dutch higher education institutions, shows interesting results regarding international students' plans to study in the Netherlands in the upcoming academic year.

### **While most respondents indicate that it is (very) likely that they will study at a Dutch higher education institution, almost half is less inclined to apply to a Dutch higher education institution if their classes would mostly be online.**

- A large majority (73%) of respondents indicates that it is (very) likely that they will study at a Dutch higher education institution in the coming academic year.
  - Respondents from the European Economic Area (EEA) more often indicate that it is (very) likely for them to study at a Dutch HEI in the coming academic year (86.1%) than non-EEA students do (72.6%).
- Most respondents (62.7%) have already submitted their application to a Dutch research university or university of applied sciences.
- Some 45.6% of respondents is (much) less inclined to apply to a Dutch higher education institution if their classes would mostly be online next year. At the same time, 16.6% of students are (much) more inclined to study at a Dutch HEI if their classes would mostly be online.
  - EEA respondents are less inclined to apply to a Dutch HEI if most of their classes would be online in the coming academic year: 55.2% of EEA respondents indicated that they are (much) less inclined to apply to a Dutch HEI if most of their classes would be online, compared to 43.1% of non-EEA respondents.

### **Almost half of the respondents is (also) considering other countries as a study destination, with the United Kingdom being a popular alternative.**

- Some 44.3% of respondents is (also) considering pursuing their studies in one or more other countries in the coming academic year, 49.6% is not and the remaining respondents did not know yet.
  - Relatively more respondents with a non-EEA nationality are considering other countries (52.5%) than respondents with an EEA nationality (29.4%).
- Among the respondents who are considering other countries, the United Kingdom is the most popular (27.8% is considering this country). Germany (27.4%) and Australia (20.1%) complete the top three.
  - Even though the United Kingdom (UK) is popular in both groups, this country is considered relatively more often by non-EEA respondents (30.7%) than EEA respondents (18.2%).
- Of the non-EEA respondents who are (also) considering the UK as their study destination (N = 54), 35% indicate that they are (much) more likely to choose the Netherlands as a result of Brexit.

### **Respondents worry most about travel restrictions due to COVID-19 and mode of instruction (online, on campus or blended).**

- Some 78.7% of the prospective students indicates that they're worried about travel restrictions and 70.0% are worried about the mode of instruction. Students seem to worry the least about admission conditions (40.7%) or visa procedures (44.6%).
  - Non-EEA respondents are more concerned about finances (personal income opportunities, tuition fees and scholarships), access to the Dutch healthcare system and their personal physical health than EEA respondents.

### **The main reasons for respondents to study in the Netherlands include quality of education and international recognition of Dutch diplomas.**

- Quality of education is the most common reason for respondents to choose the Netherlands. A large majority (87.2%) of respondents indicates that this factor makes them (much) more likely to choose the Netherlands over any other countries they might be considering. In fact, the top 4 factors are all related to education, programmes and the Dutch HEIs. They are: international recognition, the availability of programmes taught in their preferred language and the reputation and ranking of their preferred institution or institutions).
- The respondents are most negative about the factors that are directly related to finances: the cost of student housing (29.5% indicates that this makes them (much) less likely to choose the Netherlands), living expenses (28.9%) and study costs (24.9%).

## Introduction

As the COVID-19 pandemic continues hold much of the world in its grip, the Dutch higher education sector is starting preparations for the coming academic year. Will 2021-2022 be similar to this past year, with education mostly taking place online? Or will it be possible to have more on-campus coursework and face-to-face contact, as the vaccinating process is speeding up around the world? How will this affect prospective students' plans and incoming student mobility? Much is still uncertain and will depend on whether or not the COVID-19 pandemic will be successfully constrained over the coming months.

Adding to the already existing uncertainty is the fact that the coming academic year is the first one since Brexit. How will this influence international student flows, considering the UK is one of the major study destinations for international students? Expectations are that the UK will see a considerable drop in international student enrolment from the European Economic Area (EEA) and that the Netherlands might see a considerable increase (Study.EU, 2020).

This current academic year, 2020-2021, was of course a most unusual year. There were serious concerns about international students being able to come to the Netherlands to start their studies. However, based on the surveys we conducted in May and July (2020) as well as information collected by our Neso offices, we didn't expect a sharp decline of incoming international degree students. Our previous survey results showed a strong desire and determination among incoming international students to start their degree programme in the Netherlands despite the pandemic. And, indeed, many of them did come to study at Dutch higher education institutions (HEIs), albeit mostly from within the EEA.

In February 2021 the association of universities in the Netherlands, VSNU, reported that as of 1 October 2020 the total number of enrolled international students had increased by 13% compared to the previous academic year. However, this was due to an increase of EEA students. Enrolment of students from outside the EEA did decrease by 4% (VSNU, 2020: 2). The Netherlands Association of Universities of Applied Sciences, VH (Vereniging Hogescholen), reported a slight decrease of international students compared to the previous academic year (-2.7% in total). The decrease was more significant for non-EEA students (-5.7%) than it was for EEA students (-1.6%) (Vereniging Hogescholen, 2020: 3). The question now is: what will happen this coming fall?

This report aims to find answers to some of these questions and gain more insight into incoming student mobility in the 2021-2022 academic year. By sharing the information we have collected and analysed, we hope to contribute to an informed response to the anticipated developments by Dutch higher education institutions and other stakeholders in the sector.

International degree students are students with prior education outside the Netherlands and a non-Dutch nationality. This current survey was focused not only on international Bachelor's and Master's degree students, but also included exchange students, who generally spend only a number of months at a Dutch HEI. In all cases, respondents were asked about their plans to start their studies per September 2021. Summer school students and PhD candidates were **not** included in the survey.

While the COVID-19 pandemic will have an effect on outgoing mobility as well, this report focuses exclusively on incoming international students. Nuffic will be conducting another survey that will focus on the effects of COVID-19 on the outgoing mobility of Dutch students.

After a brief overview of our earlier reports that looked into the impact of COVID-19 on incoming student mobility, this report details the methodology of this current study. This is then followed by an analysis of the results of the survey, comparing different groups of respondents (e.g. EEA students vs. non-EEA students), where applicable. The report ends by offering up its main conclusions and recommendations.

## Earlier reports

This report is Nuffic's third study about how COVID-19 is affecting international students' plans to study in the Netherlands. With this report we give insight into the current study plans of international students, considering that these students have lived with the COVID-19 restrictions for over a year. They also have a better idea about how these restrictions may impact their studies abroad. This current study also compares the findings to the results of the two previous studies that focused on international students planning to come to the Netherlands. In order to make these comparisons, we based the questions in the current survey on the questions in the previous surveys. We therefore made slight adjustments to the phrasing, we used different scales and we added questions about Brexit and the factors that make these students more or less likely to choose the Netherlands as the destination country for their studies.

### First report – May 2020

In preparation of the first report 'How is COVID-19 affecting international students' plans to study in the Netherlands?' (Nuffic, 2020a), respondents were asked to fill out the survey between the end of April and the beginning of May 2020. The survey was distributed to prospective students by the Neso offices. In total, 941 students from ten different countries with a Neso office (non-EEA) participated in the study. This survey did not include prospective students from EEA countries in the analysis.

One of the main findings of this report was that the majority of respondents (80%) was still interested in studying in the Netherlands. Two-thirds of the respondents hoped to start their studies in September 2020 as planned. A second finding of this study was that prospective students (non-EEA) indicated a great number of uncertainties such as travel restrictions, visa procedures, finances and scholarship possibilities.

### Second report – July 2020

The second report on this topic (Nuffic, 2020b) was conducted in July. The survey was distributed to prospective students through different channels. We asked the Neso offices to distribute our survey, for example, but we also used the generic channels for Study in Holland and students who were awarded an Orange Knowledge Project scholarship. In total, 67% of all respondents came from a country with a Neso office, 11% came from the EEA and the rest (22%) of the respondents came from the United Kingdom or a non-EEA country without a Neso office.

One of the main findings of this report was the response to the question 'What will you most likely do?'. Respondents could share their first and second choice. Based on the results we concluded that most of the prospective students planned to travel to the Netherlands to start with on-campus classes (39% chose this as their first or second option) or online education (30%). Another outcome of this report was that, in comparison to the first survey, prospective students from Neso offices more frequently felt uncertain about visa procedures and travel restrictions.

In retrospect, the findings we reported in May and July were a good indication of the current number of international students enrolled at a Dutch HEI. As expected, the VH reported only a slight decrease (-2,7%) in enrolled international students at universities of applied sciences in the 2020-2021 academic year. The VSNU even reported an increase (13%) in enrolled students at research universities. So, despite the pandemic and the concerns prospective students had, a lot of international students still enrolled at a Dutch HEI.

## Methodology

### Distribution of the survey

For the distribution of this new survey in March 2021 we used different channels, including our network of Netherlands Education Support Offices (Neso) and the Study in Holland channels. Furthermore, we asked Dutch embassies and the Erasmus Student Network (ESN) to share the survey with prospective international students. The survey could be completed between 9 and 24 March 2021.

### Respondents

In total, 727 respondents started the survey. 201 respondents who either wanted to pursue a programme other than a Bachelor's, Master's or exchange programme or who ended the survey prematurely, were excluded from the dataset. As such, the total number of respondents included was 526.

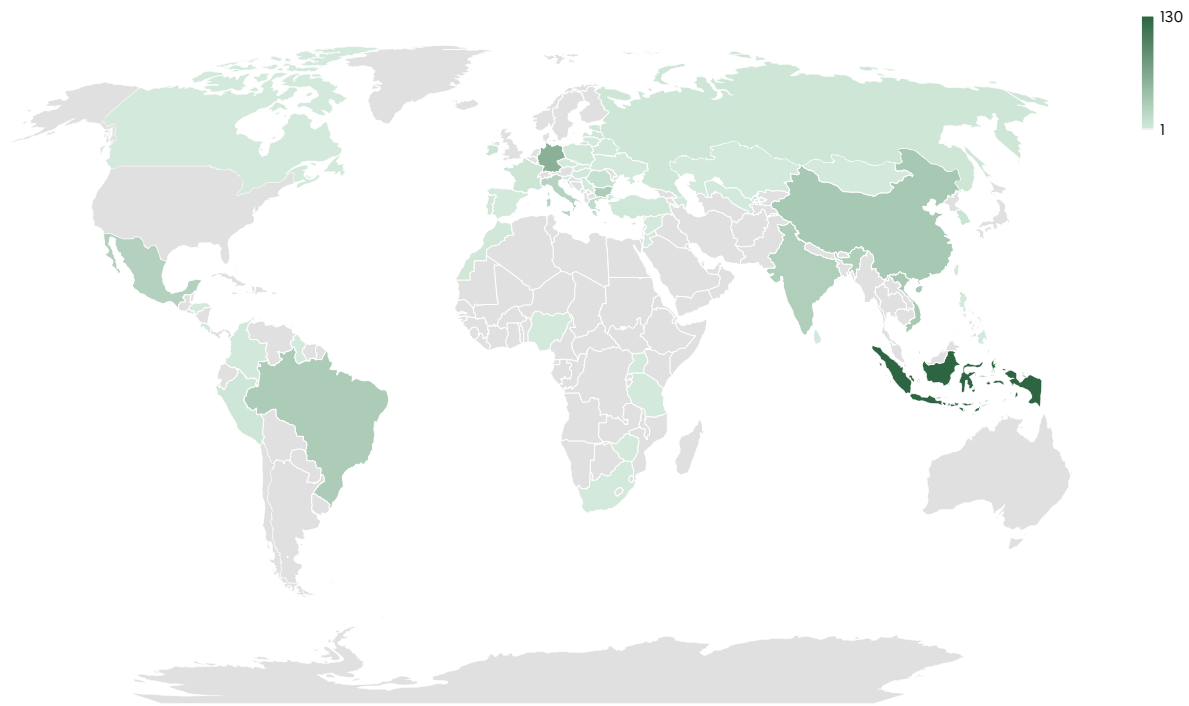
Of the respondents that were included, 52.5% is planning to study at a Dutch research university and 35.4% is planning to study at a university of applied sciences. The remaining 12.2% indicates that they do not know yet what type of institution they want to study at during the coming academic year.

Moreover, a majority of respondents wants to pursue a Master's programme (58.2%). Some 30.2% of respondents wants to pursue a Bachelor's programme, and the remaining respondents want to do an exchange (10.5% wants to do an Erasmus+ exchange, and 1.1% wants to do an exchange programme other than Erasmus+).

Furthermore, 53 different nationalities are represented by the respondents in our sample (see figure 1). The majority of respondents (64.4%) are from countries outside the European Economic Area (EU countries plus Liechtenstein, Iceland and Norway), which means that the remaining 35.6% of respondents come from an EEA country. Indonesian and German students formed the largest groups (respectively 24.7% and 10.8%) in this survey, followed by respondents from China and Vietnam (both 6.7%).

The most common preferred field of study among respondents is Economics and Business (31.2%), followed by Social Sciences (15.0%), Science (13.9%), and Engineering (13.5%).

**Figure 1.** Nationalities of respondents. The darker the country, the more respondents have that nationality



## Representation

Even though the great diversity in countries of origin among international students in the Netherlands is reflected in this sample, the distribution in nationalities of the prospected students is not fully representative. The largest group of international students in the Netherlands by far comes from Germany, followed by Italy and China. This means that Indonesia (no. 14 on the list of countries of origin in 2019-2020) and Vietnam (no. 20) are overrepresented in this sample and that Germany and Italy are underrepresented. In fact, the group of EEA nationals as a whole is underrepresented in this survey (35.6%) when compared to the actual share of EEA students among international students studying in Dutch higher education. In the 2019-2020 academic year, 72% of international degree students in the Netherlands were from an EEA country.

With respect to the most commonly chosen fields of study, these roughly correspond with the usual distribution of fields of study chosen by international students in the Netherlands. Economics & Business, Social Sciences and Engineering were the three most commonly selected fields of study by international degree students in 2019-2020 (Nuffic, 2021).

## Testing whether there are significant differences between groups

In addition to reporting the overall results, the results chapter will examine whether respondents with different characteristics also significantly differ in their responses to the survey questions. More specifically, we will compare a) respondents with an EEA nationality (N = 187) with respondents with a non-EEA nationality (N = 339), and b) respondents who want to study at a research university (N = 276) with respondents who want to study at a university of applied sciences (N = 186). To examine whether significant differences between these groups exist, we conducted Mann-Whitney U tests. This test can be seen as the nonparametric equivalent to the independent *t*-test, as the relevant variables in our survey do not have continuous, interval data (i.e. the spacing between adjacent values of the scale cannot be



assumed to be constant). More specifically, the data in our survey are either ordinal (Likert scales) or nominal (dummy variables). We regarded the difference as statistically significant when the  $p$ -value was below 0.05.

## Results

In this results chapter, we aim to give answers to the following five questions: 1) will the students come to the Netherlands?, 2) which other countries are the respondents considering?, 3) what is the influence of Brexit?, 4) what are the main concerns of the students?, and finally 5) what factors make the respondents more or less likely to choose the Netherlands as the destination country for their studies?

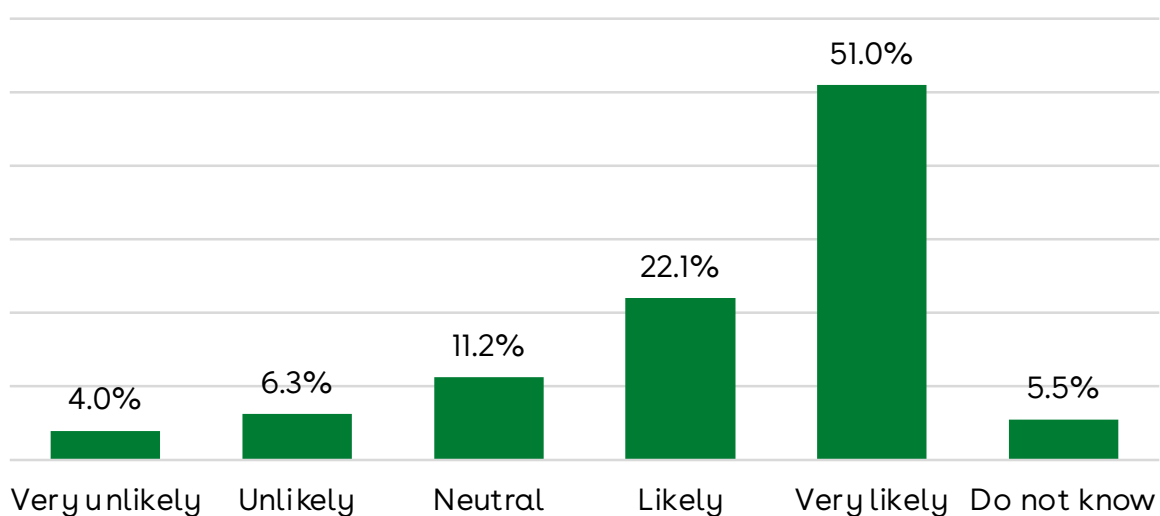
### Will the students come to the Netherlands?

By asking four questions, we wanted to get an indication of the extent to which the international students are likely to study at Dutch higher education institutions in the coming academic year. The respondents were asked 1) how likely it was that they would pursue their studies at a Dutch higher education institution, 2) what (study) scenario would be most likely for September 2021, 3) whether they have already submitted their application, and 4) whether they are more or less inclined to apply to a Dutch HEI if their classes would mostly be online in the coming academic year.

As figure 2 shows, almost three out of four respondents indicate that it is (very) likely for them to study at a Dutch HEI in the coming academic year (73.1%). Only 10.3% of respondents state that it is (very) unlikely for them to do so. The remaining respondents indicate that it is neither likely nor unlikely for them to study at a Dutch HEI (11.2%) or that they do not know (yet) (5.5%).

**Figure 2.** Respondents' answers to the question: How likely is it for you to pursue your studies at a Dutch higher education institution in the coming academic year? (N = 526)

**A large majority indicates that it is (very) likely for them to study at a Dutch higher education institution in the next academic year**



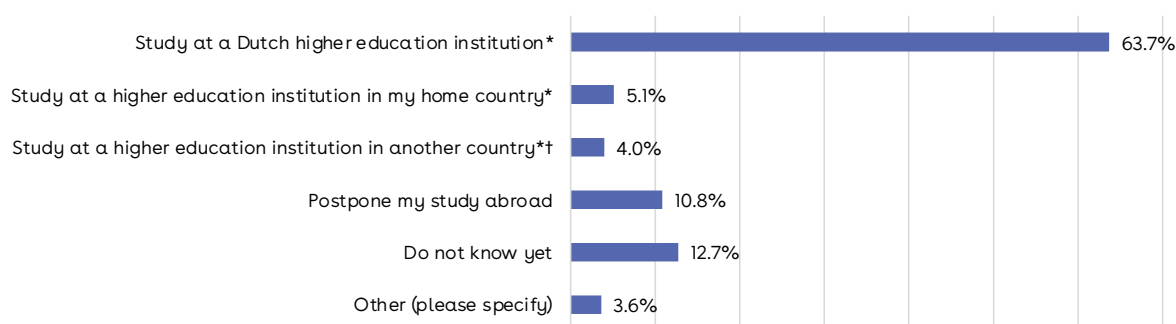
In May and July 2020, we asked a similar question: 'Is it likely for you to pursue your studies in the Netherlands?'. In May 80% of the respondents (all from countries with a Neso office) gave a positive answer and were thus likely to pursue their study in the Netherlands. The other 20% was not likely to pursue their studies in the Netherlands or they didn't know yet at the time of the survey. In July 2020 – as the start of the new academic year came closer – we repeated the question and found that 76% of respondents indicated that it was likely for them to pursue their studies in the Netherlands.

The number of prospective students who are (very) likely to study at a Dutch HEI thus seems to remain consistent at around 75% since we conducted the first survey in May 2020.

The students were then asked what their current plans are for September 2021 (they had to choose the most likely scenario, see figure 3). Again, a large majority of 63.7% indicate that they are planning to study at a Dutch higher education institution (either online or offline). Some 10.8% of respondents state that their current plan is to postpone their studies abroad, 5.1% is currently planning to study at a HEI in their home country and 4.0% is planning to study at a HEI in a third country (neither the Netherlands nor their home country). The remaining respondents indicate that they do not know yet (12.7%) or are planning to do something else (3.6%).

**Figure 3.** Respondents' answers to the question: What are your current plans for September 2021? Choose the scenario that is most likely. (N = 526)

### More than 6 out of 10 respondents is currently planning to study at a Dutch higher education institution



Note: \* either online or offline, † neither the Netherlands nor my home country

In May 2020 we asked a question with the same intention but with a different phrasing. We asked the question 'What do you prefer most at the moment'. The results in May indicated that most of the respondents (38%) preferred to start as planned with on-campus classes at a Dutch university. Some 21% of respondents preferred to defer for a year or did not know (13%) at the time of the survey.

So, the percentage of students who want to postpone or defer their studies decreased compared to the results of the May survey.

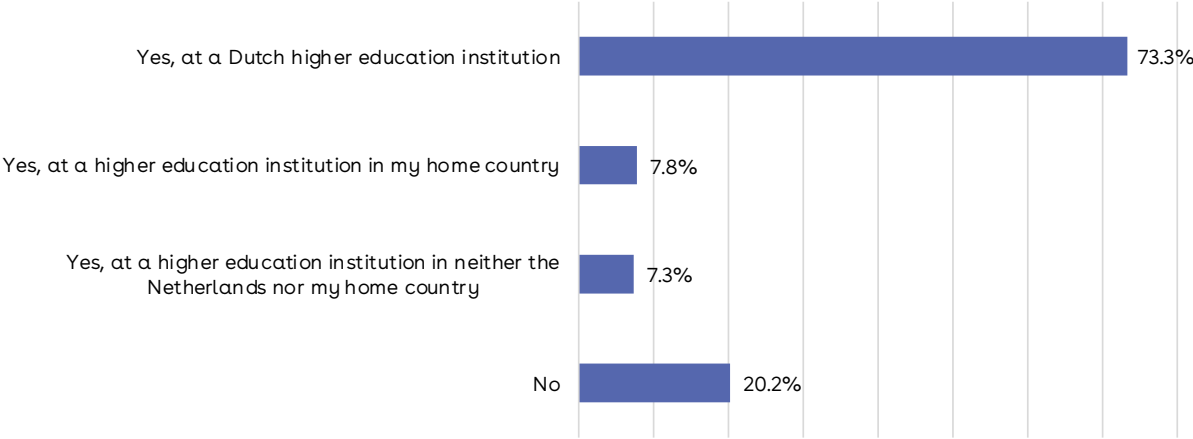
The respondents who indicated that they are planning to study at a HEI in the Netherlands, in their home country or in a third country, and the respondents who did not know yet (N = 450) were then asked whether they have already submitted their application (see figure 4). As a student can apply to several institutions simultaneously, multiple answers were possible to this question (this explains why the percentages sum up to more than 100%).

Most respondents (79.8%) indicate they have already submitted their application to at least one HEI in one country (only 20.2% have not submitted their application yet). Only a small percentage submitted their application to institutions in more than one country: 10.3% submitted applications to 2 countries and only one respondent submitted their application to a Dutch HEI, a HEI in their home country and a HEI in a third country.

Furthermore, 73.3% of respondents who got this question, indicate that they have submitted their application to a Dutch HEI (which is 62.7% when taking all respondents into account and not just the subset that was presented this question), 7.8% of respondents did so at a HEI in their home country and 7.3% of respondents has submitted their application to a HEI in a third country.

**Figure 4.** Respondents' answers to the question: Did you already submit your application? Multiple answers possible. (Respondents who filled in 'postpone my studies abroad' or 'other' when asked about their most likely scenario, were excluded, N = 450)

### Most students have already submitted their application



The question 'Have you already submitted your application' was also part of the survey we conducted in May and July. The only difference between the three surveys lies in the answers students had to choose from. In the previous two surveys the research universities and universities of applied sciences were separate answers. In the current survey we combined the two types of institutions into the option 'higher education institution'. This is because the respondents could indicate whether they are planning to study at a research university or a university of applied sciences in an earlier question.

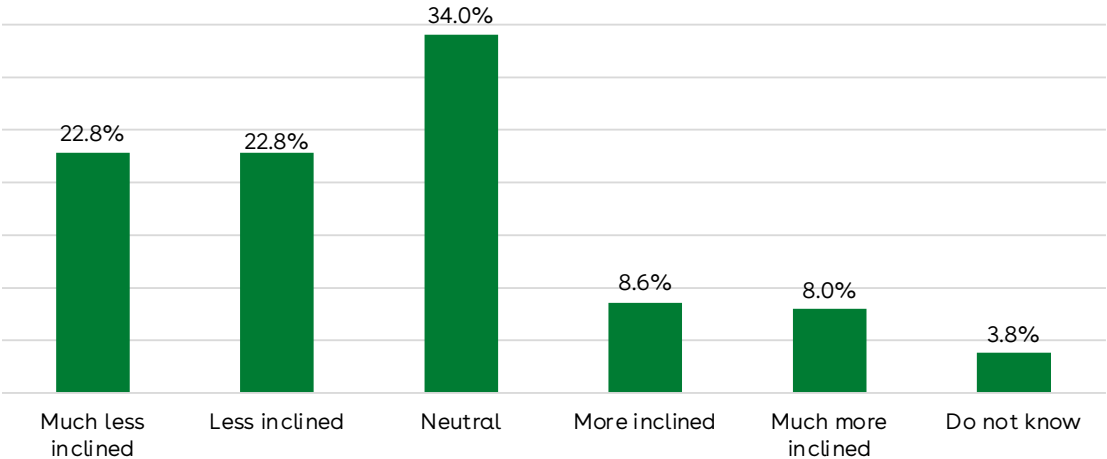
In May, 7 out of 10 prospective students from a country with a Neso office had already applied to a Dutch higher education institution. 56% had also received an admission letter regarding their application. In July, 58% of the respondents from the countries with a Neso office had received an admission letter from one of the Dutch higher education institutions. For the OKP scholarship recipients, that percentage was even higher; 86% of the OKP scholarship recipients had already received an admission letter regarding their application to a Dutch higher education institution. From the students in the EEA, 75% of the respondents had received a formal decision regarding their application at a Dutch higher education institution.

During the current survey most of the application deadlines haven't passed yet, which is different from the situation in the May and July. Despite this difference we could say that the number of prospective students who applied in March 2021 is comparable to the previous studies.

Since it is not guaranteed that classes will (mostly) take place on campus instead of online in the coming academic year, we were also interested to find out whether the respondents are more or less inclined to apply to a Dutch higher education institution if their classes would mostly be taught online next year. As figure 5 shows, almost half of respondents (45.6%) would be (much) less inclined. However, it should also be noted that 16.6% of students would be (much) more inclined to study at a Dutch HEI if their classes would mostly be taught online. Moreover, about a third of the respondents (34.0%) is neither more or less inclined, while the remaining 3.8% does not know (yet).

**Figure 5.** Respondents' answers to the question: Are you more or less inclined to apply to a Dutch higher education institution if your classes would mostly be online in the coming academic year? (N = 526)

**Only a small proportion of respondents would be more inclined to apply to a Dutch higher education institution if most of their classes would be online**



## Comparing groups of respondents

For three out of four questions, significant differences exist between respondents with an EEA nationality and respondents with a non-EEA nationality. First of all, respondents with an EEA nationality more often indicate that it is likely for them to study at a Dutch HEI in the next academic year than non-EEA students. To be exact, 86.1% of EEA respondents indicate that it is (very) likely for them to study at a Dutch HEI, compared to 72.6% of non-EEA respondents. Correspondingly, EEA students are more often planning to study at a Dutch HEI than non-EEA students: 74.9% of EEA respondents chose studying at a Dutch HEI as the most likely scenario, compared to 57.5% of non-EEA respondents. Lastly, EEA respondents are less inclined to apply to a Dutch HEI if most of their classes would be online during the next academic year: 55.2% of EEA respondents indicate that they are (much) less inclined to apply to a Dutch HEI if most of their classes would be online, compared to 43.1% of non-EEA respondents.

Moreover, no significant differences exist between respondents who want to study at a research university and those who want to study at a university of applied sciences with respect to all four questions.

## Which other countries are the respondents also considering?

The respondents were then asked whether they were currently (also) considering one or more countries other than the Netherlands in which to pursue their studies in the coming academic year. Some 44.3% of respondents answered this question with 'yes', 49.6% with 'no' and the remaining 6.1% with 'I do not know'.

In May and July 2020, we also asked the respondents the question 'Is it likely for you to pursue your studies in a country other than the Netherlands?'. Respondents could choose the same options as in the current survey. In May 2020 around 26% of the respondents from Neso countries answered that they were considering other countries than the Netherlands in which to pursue their studies.

In July 2020 the number of respondents from a country with a Neso office considering other countries than the Netherlands dropped to 21%. When looking at the total sample (the respondents from the Neso-countries, the OKP scholarship recipients and the EEA students taken together), we found that 17% was considering other countries than the Netherlands in which to pursue their studies.

It should be noted that the differences between percentages in this survey and last years' surveys could, at least partly, be explained by the surveys' timing. Respondents participating in the previous surveys were further along in their application process: deadlines were in sight or had already passed. This could explain why a smaller percentage of those respondents were considering other countries than the Netherlands in which to pursue their studies.

An important finding here is that significantly fewer respondents with an EEA nationality are considering one or more other countries than the Netherlands compared to students with a non-EEA nationality. In fact, whereas 52.5% of respondents with a non-EEA nationality is considering one or more other countries, only 29.4% of respondents with an EEA nationality is doing so. Once again, there were no significant differences between respondents who want to study at a research university and respondents who want to study at a university of applied sciences.

In addition, we were interested to know which countries respondents are considering (multiple answers were possible). Only the 234 respondents who indicated that they are considering one or more countries other than the Netherlands were presented this question. These respondents named 69 different countries in total. On average, the respondents who filled in this question are considering 2.9 (other) countries in total (1.5 EEA countries and 1.4 non-EEA countries).

Some 35.9% is considering only one other country, 25.6% is considering two other countries, 15.8% is considering three countries and the remaining 22.7% is considering more than three countries (1 respondent was considering an impressive 24 other countries).

Table 1 shows which countries are most commonly chosen among respondents who are considering at least one country other than the Netherlands in which to pursue their studies. When taking all respondents into account, the United Kingdom is the most commonly chosen country to study, with 27.8% (also) considering this country. Germany (27.4%) and Australia (20.1%) complete the top three. When comparing EEA nationals and non-EEA nationals, it becomes clear that, even though the United Kingdom is popular in both groups, this country is relatively more often considered by non-EEA respondents (30.7%) than by EEA respondents (18.2%).

**Table 1.** Most commonly chosen countries that respondents are considering (other than the Netherlands). The percentage in brackets is the percentage of respondents that is considering that particular country.

Top 5 countries all respondents (N = 234)		Top 5 countries respondents from non-EEA countries (N = 179)		Top 5 countries respondents from EEA countries (N = 55)	
United Kingdom	27.8%	United Kingdom	30.7%	Germany	27.3%
Germany	27.4%	Germany	27.4%	United Kingdom	18.2%
Australia	20.1%	Australia	24.6%	Italy & France	12.7%
United States	16.7%	Canada & United States	18.4%	United States, Sweden & Norway	10.9%
Canada	15.4%				

In May and July 2020, we also asked the respondents which other countries they were considering. Results indicated that in May 2020 Germany, Belgium and Sweden were the most preferred countries for prospective students other than the Netherlands. In July, prospective students were still considering Germany and the United Kingdom as countries in which to pursue their studies.

## Comparing groups of respondents

Some interesting differences exist between EEA nationals and non-EEA nationals when it comes to both the average number of countries that respondents are considering and the countries they are considering. First of all, on average, EEA nationals are considering fewer other countries than non-EEA nationals (2.4 and 3.1 respectively, though this difference is not significant). Secondly, EEA nationals are considering mostly other EEA countries and non-EEA nationals are considering mostly non-EEA countries (EEA nationals are considering 1.8 EEA countries and 0.6 non-EEA countries, non-EEA nationals are considering 1.4 EEA countries and 1.7 non-EEA countries).

## What is the influence of Brexit?

Since the United Kingdom left the European Union in January 2020, the UK is no longer part of the Erasmus+ programme, among other things. The UK government also announced that students from the EU will lose the 'Home' fee status and the access to public student loans with the start of the 2021/2022 academic year (Study.EU, 2020).

Based on these developments, we asked the 64 respondents who indicated they were considering the United Kingdom as an alternative country in which to pursue their studies the follow-up question: 'To what extent does Brexit influence your decision to choose the United Kingdom or the Netherlands as the destination country for your studies?'

Some 35.2% of the 54 prospective students from non-EEA countries are, based on the influence of the Brexit, (much) more likely to choose the Netherlands as the destination country for their studies. A small proportion of 14% of the students are (much) more likely to choose the United Kingdom. More than half of the students don't know or are neutral about the extent that Brexit influences their decision to choose the United Kingdom or the Netherlands as the destination country for their studies. This could possibly be explained by the fact that non-EEA students never had access to public student loans. Therefore, the costs of studying in the United Kingdom has not changed dramatically for non-EEA students since Brexit.

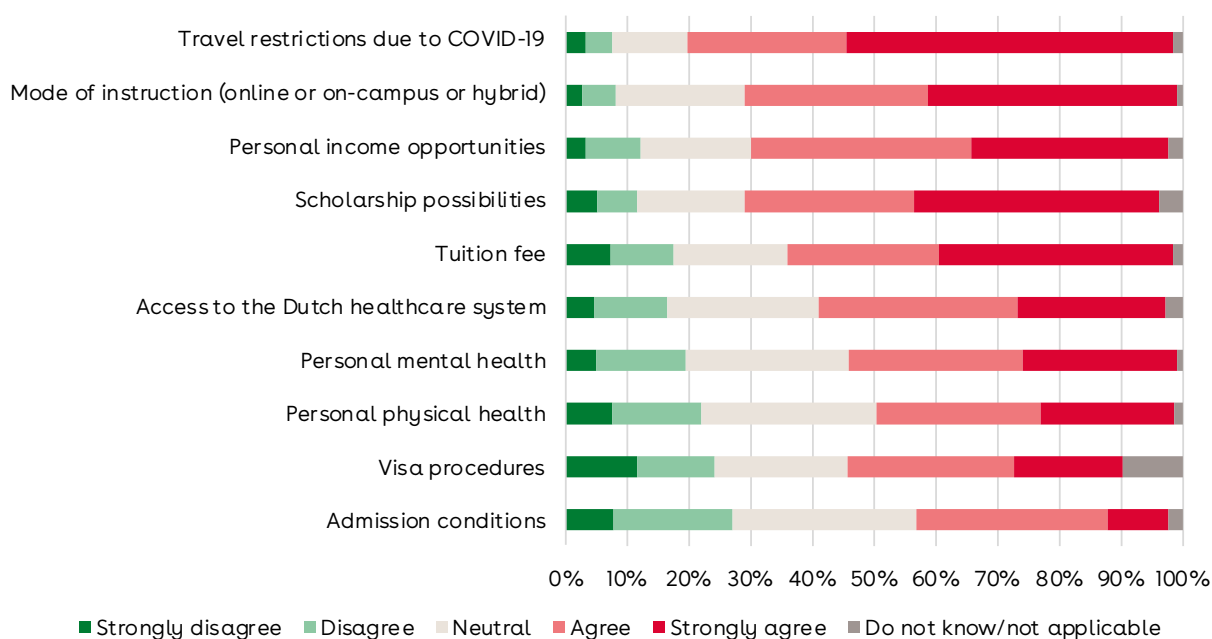
A small group of 10 respondents from EEA countries are considering the United Kingdom as an alternative destination country for their studies. 8 out of these 10 prospective students answered that they are (much) more likely to choose the Netherlands over the United Kingdom as the destination country for their studies based on the influence of the Brexit. The remaining 2 students are neutral about the extent that Brexit influences their decision to choose the United Kingdom or the Netherlands as the destination country for their studies.

## What are the main concerns of the students?

To gain insight into the prospective students' concerns, we gave the respondents 10 statements. Each statement had a Likert scale on which the student could indicate how much they agree with said statement. As shown in Figure 6, almost 8 out of 10 students seem most worried about travel restrictions (78.7% agrees or strongly agrees with this statement). This could be explained by the negative travel advice, as well as the measures one must take in order to travel to the Netherlands, such as showing a recent negative test result and going in quarantine after arrival. Some 70% of the students are also worried about the mode of instruction they will receive, meaning online, on-campus or a hybrid of the two. Another topic prospective students worry about are finances. More specifically the personal income opportunities (67.6%) and scholarship possibilities (67.1%). Students seem least worried about admission conditions (40.7%) and visa procedures (44.6%).

**Figure 6.** Respondents' answers to the question: To what extent do you agree with the following statements? I worry about... (N = 493)

## Respondents worry most about travel restrictions and mode of instruction



In the previous surveys we asked the respondents the question 'What are the main uncertainties?'. Multiple options could be selected. We didn't work with a scale, so the percentages are not directly comparable to the findings in this survey. In May 2020 the main uncertainties for students from countries with a Neso office were travel restrictions (51.3% selected this option), scholarship possibilities (49.9%) and finances (41.4%). In July we asked the same question and we found that the most common uncertainty among students from countries with a Neso office was still travel restrictions (62.8%), followed by visa procedures (46.4%) and finances (40.3%).

So, despite the different phrasings of the questions in the surveys we can conclude that travel restrictions and the finances are recurring concerns for prospective students.

### Comparing groups of respondents

When comparing EEA nationals with non-EEA nationals, we found that non-EEA nationals worry significantly more about 6 out of 10 statements. Three themes can be distinguished. First of all, as can be expected, non-EEA respondents worry more about visa procedures than EEA respondents. Secondly, they agree more with the statements relating to worries about finances (personal income opportunities, tuition fee and scholarship possibilities). Lastly, they seem to worry more about their personal physical health and access to the Dutch healthcare system.

Moreover, compared to respondents who are planning to study at a university of applied sciences, respondents who are planning to study at a research university worry significantly more about their tuition fee and scholarship possibilities.



## **What factors make the respondents more or less likely to choose the Netherlands?**

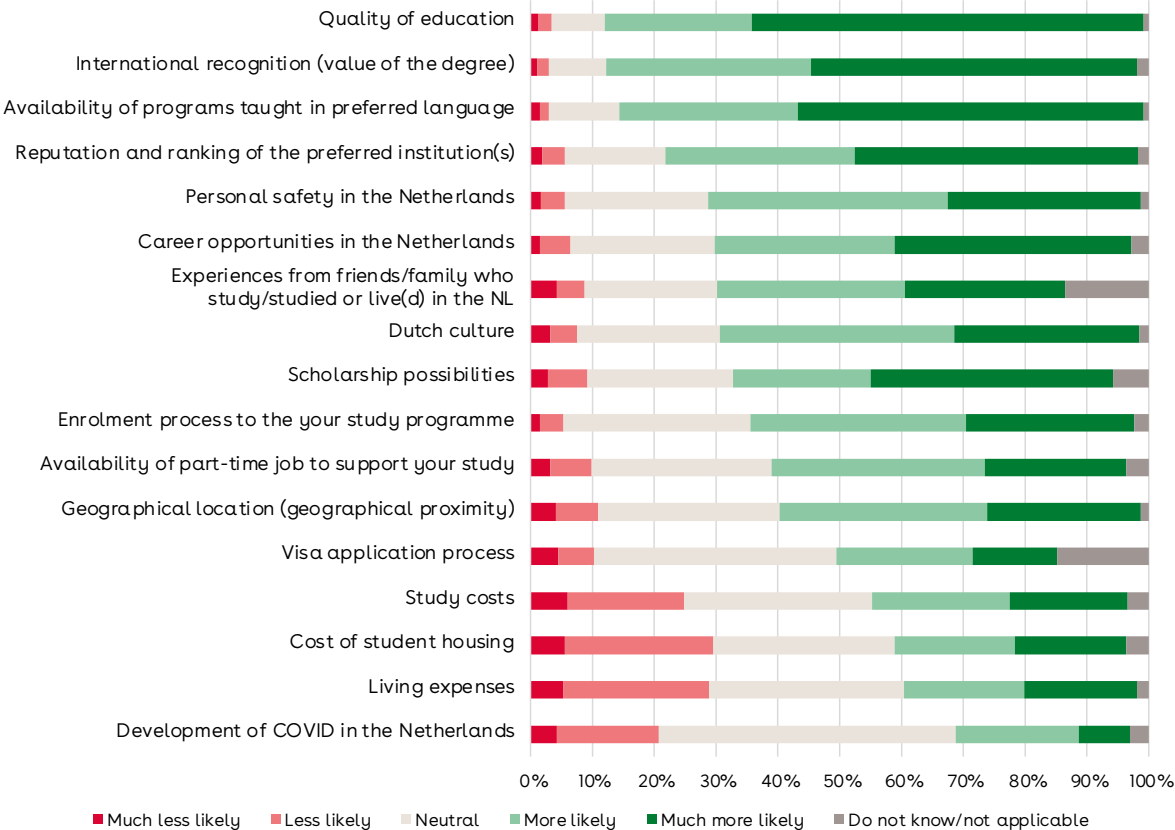
Finally, the respondents were asked whether a number of factors made them either more or less likely to choose the Netherlands as the destination country for their studies (compared to the other countries that they might be considering). We extracted most of these factors from three scientific articles about international students' selection criteria for international education (Ahmad et al., 2016; Cubillo et al., 2006; Mazzarol & Soutal, 2002) and the reasons Study in Holland (2021) lists to choose the Netherlands. We decided to ask them about 17 different factors in total and there were also two open-ended questions where they could fill in any other factors that make them either more or less likely to choose the Netherlands.

For each factor, they could indicate whether it made them more or less likely to choose the Netherlands (1 = much less likely, 5 = much more likely) and there was also a don't know/not applicable option. As figure 7 shows, for most factors (12 out of 17) there is a majority of respondents who indicate that these factors make them either more or much more likely to choose the Netherlands as the destination country for their studies. Quality of education comes out on top: no less than 87.2% of respondents indicates that this factor makes them (much) more likely to choose the Netherlands. In fact, the top 4 factors are all related to education, programmes and the Dutch HEIs (the other 3 factors are international recognition (value of the degree) (85.9% chose either the option more likely or much more likely), availability of programmes taught in preferred language (84.8%) and reputation and ranking of the preferred institution(s) (76.4%).

The respondents are least positive about development of COVID-19 in the Netherlands (68.7% is either neutral about this factor or indicates that this made them (much) less likely to choose the Netherlands), and about the factors that are directly related to finances, such as living expenses (60.4%), cost of student housing (58.9%), and study costs (55.3%). When just adding the options much less likely and less likely, the respective percentages for these factors are as follows: 20.8%, 28.9%, 29.5%, and 24.9%.

**Figure 7.** Respondents' answers to the question: Do the following factors about studying/ life in the Netherlands make you more or less likely to choose the Netherlands as the destination country for your studies (compared to the other country/countries that you might be considering)? (N = 467)

**Quality of education and international recognition make the students more likely to choose the Netherlands**



**Comparing groups of respondents**

When comparing EEA nationals with non-EEA nationals, non-EEA nationals score significantly higher with respect to 10 factors. This means that these 10 factors have a bigger impact on their decision to choose the Netherlands (instead of other countries) than they do for EEA nationals. Half of these factors are directly or indirectly related to personal finances, namely: availability of a part-time job to support their studies, scholarship possibilities, study costs, cost of student housing and living expenses. So, even though the non-EEA respondents worry significantly more about the factors relating to finances than EEA respondents, these factors are also more important in their decision to choose the Netherlands as their destination country for their studies.

The other five factors are the development of COVID-19 in the Netherlands, personal safety in the Netherlands, career opportunities in the Netherlands, the enrolment process for their study programme, and the visa application process.

Three factors also showed significant differences between respondents who are planning to study at a research university and respondents who are planning to study at a university of applied. Respondents who are planning to study at a university of applied sciences score higher on the availability of a parttime job to support their studies and the visa application process. Respondents who are planning to study at a research university, however, score higher on the reputation and the ranking of their preferred institution.

### Open-ended questions

We also added the open-ended question 'Are there any other factors that make you **more** likely to study in the Netherlands?'. The most frequently answered words of the 134 respondents who answered this question are combined in the first word cloud (Figure 8). The bigger words are mentioned more often. Note that words such as 'and', 'to', and 'it' are filtered out.

In imitation of the results of the question above, topics that are mentioned in the open-ended question rather frequently (28%) are the quality of the education and the career possibilities. For example, respondents mention the high ranking of institutions in the Netherlands, the research and study possibilities in the field of water management and environmental studies, the double degrees that are offered and the fact that a lot of the programmes are taught in English.

*"The Dutch educational system is of high quality and Dutch universities are acknowledged worldwide for their well-designed, modern courses and facilities."*

*"I believe that the Netherlands is one of the top countries not only to study but also find a job that suits your personal interests."*

Another topic that comes up often is Dutch culture. Some 25% of the prospective students identifies the Dutch culture as a factor that makes it more likely for them to study in the Netherlands. For example, the large international and multicultural community, the open-mindedness, the acceptance and safety for the LGBTQ+ community and quality of life are mentioned several times.

*"The Dutch international environment, concern for nature and equality as well as the global visual."*

Some of the respondents (17%) are more likely to choose the Netherlands because they have family or friends in the Netherlands or already familiar with the country or the language. And in some cases (10%) a granted scholarship is the factor that makes them more likely to study in the Netherlands.

**Figure 8.** Word cloud of the most common words in the answers of the respondents to the question: 'Are there any other factors that make you **more** likely to study in the Netherlands?' (N = 134)



As a follow-up question, we asked 'Are there any other factors that make you less likely to study in the Netherlands?'. A word cloud of the responses of the 99 respondents who answered this question is shown in Figure 9.

It became clear that a lot of the prospective students (47%) mentions finances as a factor that makes it less likely for them to study in the Netherlands. This supports the results as shown in Figure 9. In the open-ended question specifically, the cost of living, the currency of the euro for non-EEA students, the tuition fees and the possibility of not getting a scholarship are factors that make it less likely for these students to study in the Netherlands. Some students also mentioned the difficulty of finding housing and the employability during or after their studies.

*"Cost of living and chance of getting jobs after graduation"*

*"Not getting a scholarship would make it very hard"*

Moreover, 15 students wrote that the possibility of online classes was a factor that makes it less likely for them to study in the Netherlands. Online classes would make it harder to make friends, raise concerns about the quality of the education and reduce the perceived added value of studying abroad.

*"I don't want to study online because I want to meet people too, besides, the education is much better when is face to face"*

Some 12% of the students also mentioned COVID-19. Their worries included the development of COVID-19 in the Netherlands, the possible travel restrictions and the current restrictions in the Netherlands such as the evening curfew.

*"I am worried about the COVID-19 restrictions"*

The remaining prospective students mentioned among other things the weather, the possibility of discrimination, the cultural differences with their home country and the admissions process.

“The weather, it is different from my country and could be a sort of physical and mental shock”

**Figure 9.** Word cloud of the most common words in the respondents’ answers to the question: ‘Are there any other factors that make you **less** likely to study in the Netherlands?’ (N = 99)



## Conclusion

International students' interest in studying in the Netherlands appears to be resisting the concerns caused by the COVID-19 pandemic. We find that similar to last year, when the pandemic just broke out, prospective international students still want to come to the Netherlands this coming September. Most respondents indicate it is (very) likely that they will study at a Dutch higher education institution in the coming academic year (2021-2022). This is not to suggest that the interest to come to the Netherlands is completely unconditional. Almost half of respondents do indicate that they are less inclined to apply to a Dutch higher education institution if their classes would mostly take place online next year. This means COVID-19 developments in the coming months, and the possibilities for on-campus classes, could still have a considerable effect on the actual number of incoming international students this coming autumn.

While it is not uncommon for prospective international students to consider multiple countries as potential study destinations, there are significant differences between EEA students and non-EEA students. Significantly fewer respondents with an EEA nationality are considering other countries than the Netherlands compared to students with a non-EEA nationality. This is interesting information when looking at enrolment probability.

The United Kingdom remains a popular study destination even after Brexit. Among the students who are considering other countries besides the Netherlands, the UK is the most popular, followed by Germany and Australia. Although the UK is more popular among non-EEA respondents than it is among EEA respondents, a third of the non-EEA respondents who are considering the UK nonetheless indicates that they are (much) more likely to choose the Netherlands as a result of Brexit. This is remarkable, since Brexit does not affect their tuition fees, as it does for EEA-students. This implies that other factors, such as visa requirements and (travel) access to the rest of the European Union, may play a role. It is important to note, however, that the sample size for this question was limited (N = 64).

Concerns related to COVID-19 continue. Respondents worry most about travel restrictions and the mode of instruction (online, on campus or a hybrid of the two). If Dutch HEIs are able to indicate in advance what the mode of instruction will be starting this September, that would resolve one of the main concerns of prospective international students.

The concerns regarding the mode of instruction do not seem to have affected respondents' view of the quality of Dutch higher education. The quality of education and the international recognition of Dutch diplomas are the top reasons for respondents to study in the Netherlands.

Overall, our findings show a consistent interest to study in the Netherlands and do not indicate a significant reduction of incoming student mobility in 2021-2022. If a reduction does take place, it will likely again be more from outside the EEA area, which is in line with what the figures show for the current 2020-2021 academic year. Considering that actual incoming student mobility may differ from the current number of students registered to come, it is only towards the end of 2021 that we will have the data to verify these conclusions.

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# Colophon

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