

The background features a collage of various educational and search-related elements. At the top left, there's a snippet of a search engine results page with the text 'Unsure what to study? See what's popular...'. Below this, several topic cards are visible: 'Agriculture' with a leaf icon, 'Law' with a scale icon, 'Creative arts' with a palette icon, and 'Architecture' with a building icon. There are also snippets of code like 'a.callback=...' and 'a.length=...'. At the bottom right, there's a snippet of a city street scene with the text 'USA'.

# International student recruitment: Can the UK maintain its market share?

#HClforum

The background features a collage of various images and text elements. At the top left, there's a snippet of a website with the text "Unsure what to study? See what's popular...". Below this, there are several overlapping panels. One panel shows a computer screen with code snippets like "a.callback=", "length=", "a.util.", and "a.util.". Another panel is labeled "Agriculture" with a leaf icon. A third panel is labeled "Travel" with a person icon. A fourth panel is labeled "Law" with a scale icon. A fifth panel is labeled "Creative arts" with a paint palette icon. A sixth panel is labeled "Architecture" with a building icon. A seventh panel is labeled "USA" with a cityscape icon. The overall theme is education and international travel.

# Session 1: What does Brexit really mean for UK higher education?

Lucy Shackleton, UUK International

# Session 2: What is happening to demand for international students in the UK?

Findings from the 2016 Parthenon-EY / hotcourses Group survey

Matt Robb, Parthenon-EY and Aaron Porter, Hotcourses Group



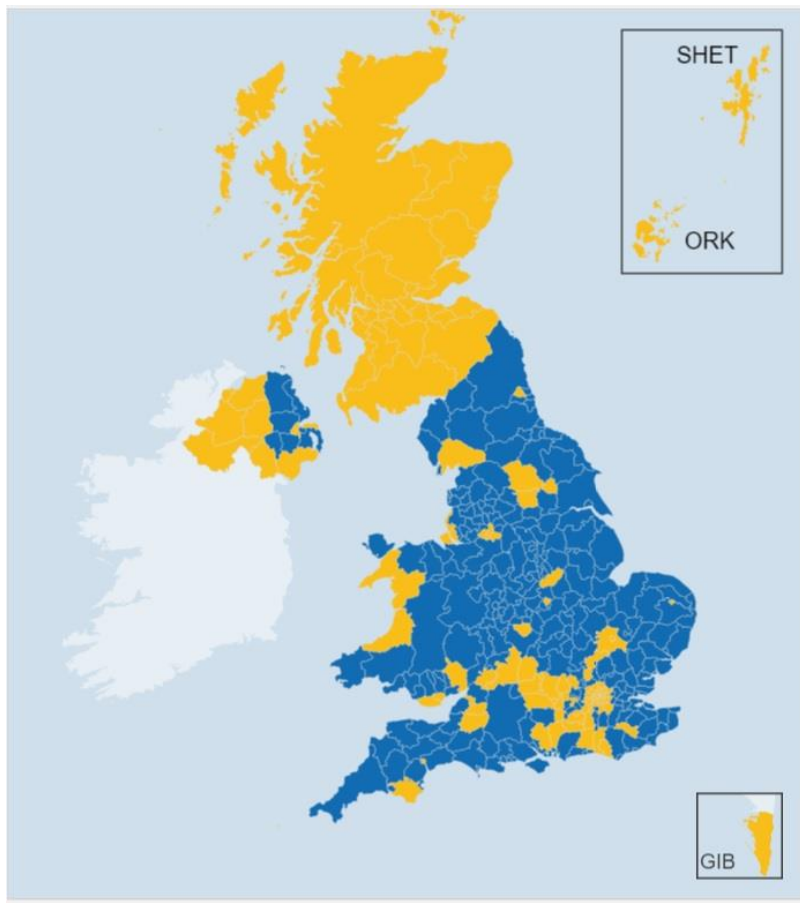
Universities UK

# What does Brexit mean for UK HE? How can we minimise the impact?

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Lucy Shackleton  
Head of European Engagement

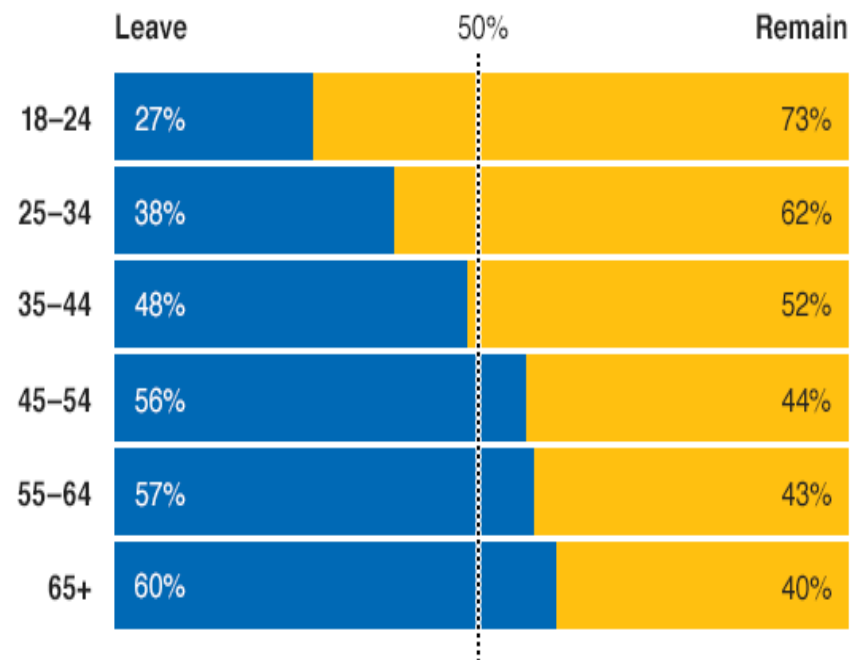
# 48% Remain , 52% Leave



Key:

Majority leave    Majority remain

## How different age groups voted



Source: Lord Ashcroft Polls

BBC

Turnout: 18-24 64%    >65 90%

## **People:**

*15% of the academic workforce and 5% of the student body are from other EU countries*

- Current and prospective international and EU staff and students feeling less welcome
- Uncertainty on the future immigration status of EU students and staff
- Challenging environment for recruitment and retention of EU and non-EU staff – 8% decrease in applications registered in October 2016 as compared to 2015
- Attractiveness of UK as a destination for EU and non-EU students

## **Access to networks and funding:**

*EU research support central growing proportion of UK university research income & central to high profile international science*

- Perceptions of the UK as a less stable/secure partner for collaborative projects
- Uncertainty regarding future UK access to H2020; Erasmus+; Structural Funding
- Uncertainty regarding future access to finance: European Investment Bank loans, credit ratings

## **Wider considerations**

- Macro economy and currency fluctuations
- Uncertainty regarding future regulatory environment for science post-UK's exit
- Anti-expert feeling; social cohesion, national and regional divisions

# Transitional support needed from Government

## People

- Provide immediate reassurances to EU students starting in 2016/17 on their eligibility to access student loans for the duration of their course (**statement made June 2016**)
- Provide immediate reassurances to EU students starting in 2017/18 on their eligibility to access student loans for the duration of their course (**statement made October 2016**)
- Provide immediate reassurances to EU students starting in 2018/19 on their eligibility to access student loans for the duration of their course
- Confirm that there will be no change to the residency and immigration status of those EU nationals already in the UK before the date of Brexit and actively promote the UK as a destination for study

## Networks and funding

- Take steps to avoid significant disruption to UK participation in Horizon 2020 and projects funded by the Structural Funds by underwriting UK participation in funded projects post-exit (**statements made in August 2016/September 2016**)
- Commit to full UK participation in Horizon 2020 until the end of the programme in 2020 regardless of the date of exit
- Continue to promote EU funding opportunities to UK researchers and engage pro-actively with the EU research and higher education policy

# #WeAreInternational





# Confronting fears at fairs across Europe

UUKi and British Council

Presence at EU students at 15 exhibitions and fairs across Europe



Student-facing key messages

- Nothing will change while the UK is still in the EU - expected to leave 2019
- UK universities are proud to be international communities, welcoming and benefiting from students from all over the world
- EU and international staff and students are and will always be an integral part of university life
- Current EU students studying at UK universities and those applying for 2017/18 courses will continue to be treated in the same way as UK students and will pay the same fees and have the same access to loans
- What our long-term relationship looks like will depend on what is negotiated
- The UK's relationship with the EU is changing but not ending

# Political context - exit negotiations



‘Brexit means Brexit’: Article 50 by March 2017, formal exit March 2019

Negotiating positions unclear: probable end to freedom of movement but clear divisions within the Cabinet

Position of EU27 and EU institutions: no rights without responsibilities – ‘no cherry-picking’

Uncertain impact of French and German elections

*Balancing 3 priorities...*

1. Addressing immigration concerns
2. Avoiding economic damage from Brexit
3. Promoting a globally engaged UK



## Exit negotiations

- To secure residency rights for EU nationals currently working in the sector post-Brexit
- To minimise barriers for future EU university staff and students coming to the UK, regardless of wider arrangements for EU nationals
- To secure an outcome that enables continued participation in European science and higher education policy and programmes post 2020
- To secure an outcome which preserves and builds on regulatory and standards equivalence with other EU countries

## Domestic priorities

- Ensure the UK remains an attractive destination for global talent – reform the immigration system to recognise contribution of overseas staff and students
- More global opportunities for UK staff and students
- Achieve greater coherence in international HE/research policy through a Government-owned, cross-Departmental strategy
- Increase public investment in research base and support international collaboration

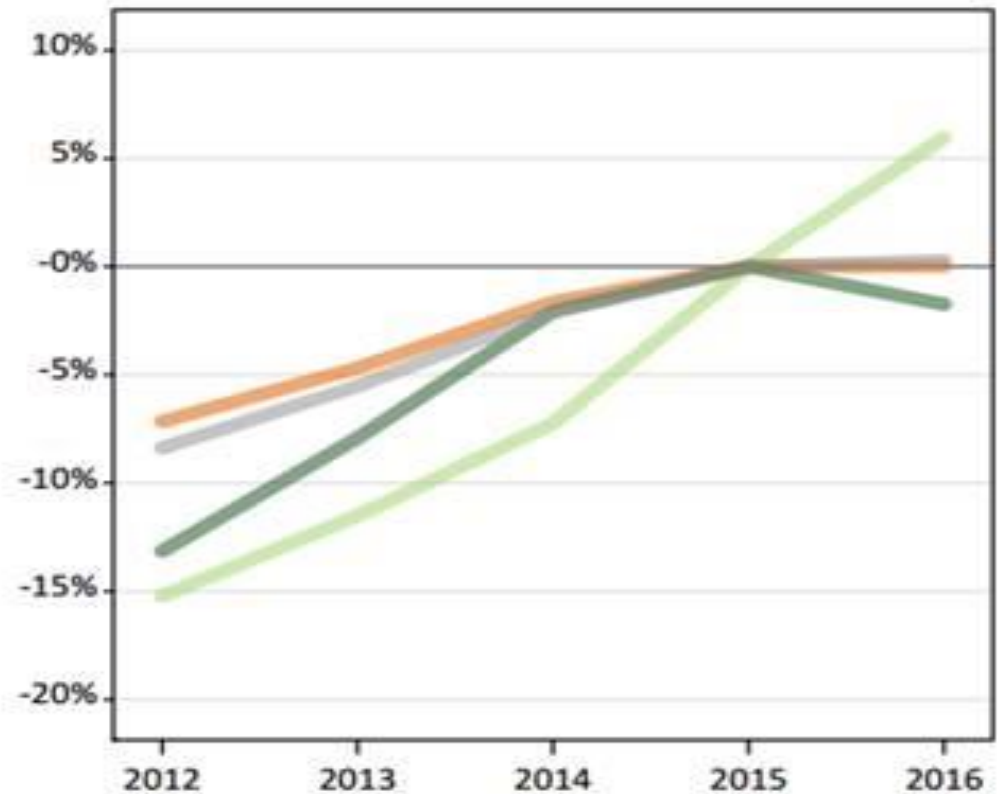
# EU Recruitment in context

## Applicants by domicile at the 30 June deadline

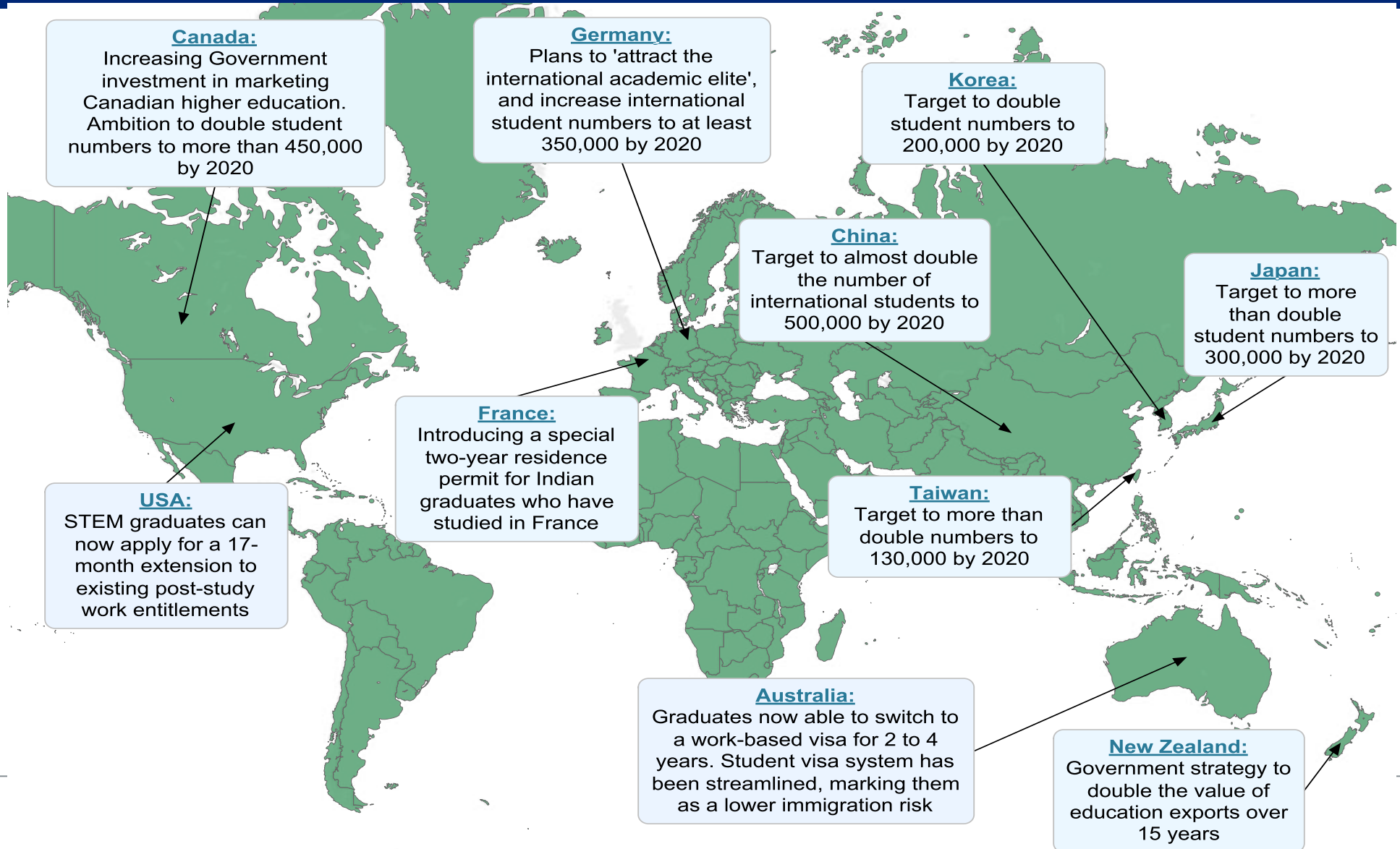
### 1.1.1 Applicants by domicile group Difference between cycle and 2015 cycle

- UK
- EU (excluding UK)
- Not EU
- All domiciles

Difference between cycle and 2015 cycle

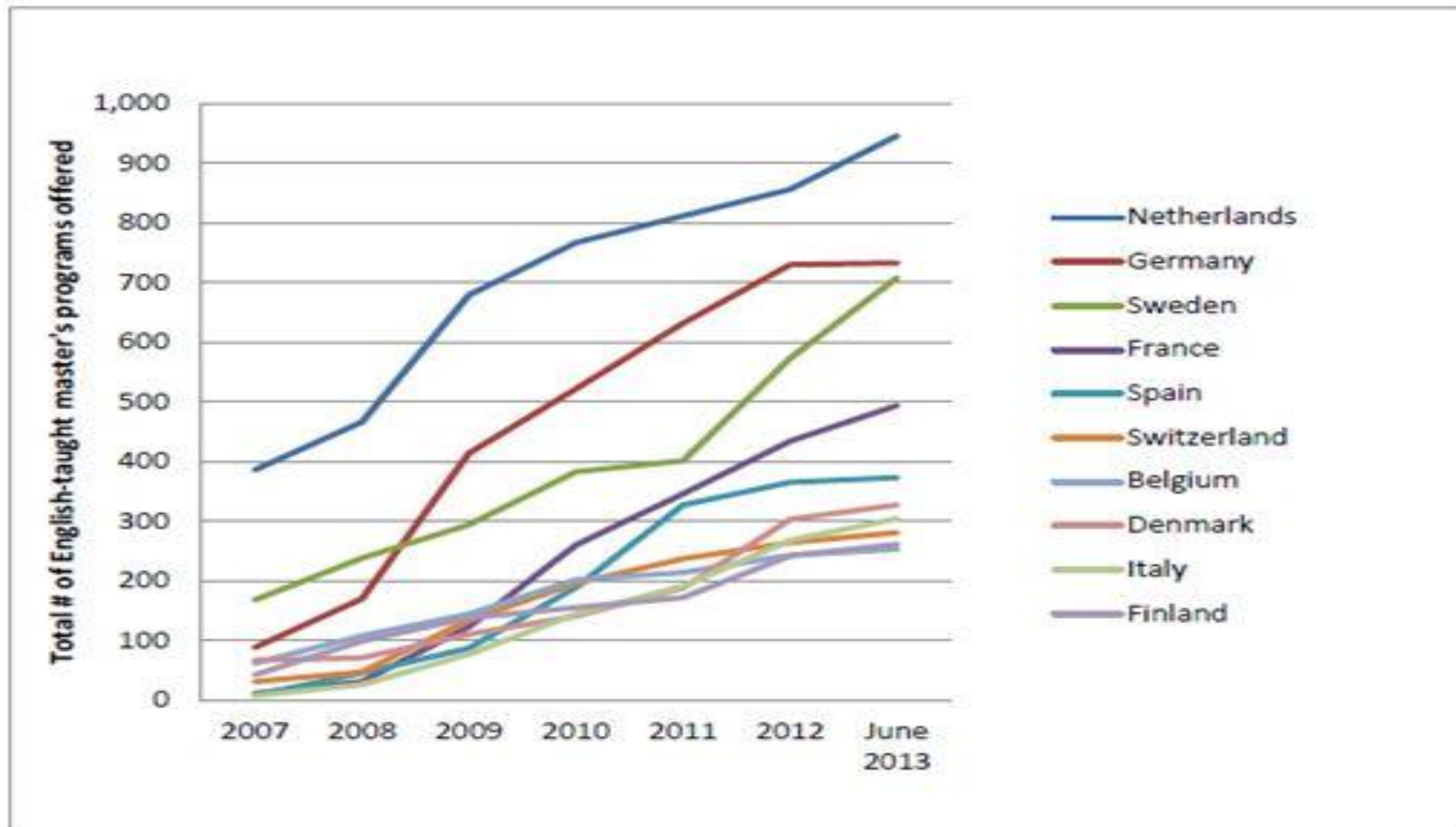


# Increasing international competition



# Growth in English language provision

## Growth of English-Taught Master's Programs in Europe



# Key factors for success

## **Positioning universities to the UK Government**

- Avoid the perception that universities are simply arguing to retain the status quo
- Underline the role that universities can play in a 'Brexit success package' – in promoting a global role for the UK, stimulating local growth and through developing a skilled workforce
- Keep up the pressure in relation to international students and the net migration figures: this is a major export industry

## **EU-UK negotiations**

- For UK Government focus on the 'EU added value' of key programmes & difficulty of replicating these at national level
- Recognise that research & HE likely to be seen as 'second order' issues: maintain visibility of these issues at national level as well as UK participation in EU programmes
- Negotiations will depend on position of EU27 – joint lobbying with university sectors across the continent

## **Strong and networked universities are more important now than ever**

- Adaptability and flexibility in universities' internationalisation: new markets, free trade deals, TNE, bilateral?
- 'Post-truth politics' OED's word of the year: universities and academic expertise must continue to inform public debate
- Importance of civic engagement: demonstrating what universities do for their communities



PARTHENON

# 2016 Prospective International Student Survey

Aaron Porter, Director of Insights, Hotcourses Group  
Matt Robb, Managing Director, Parthenon-EY



#HClforum



## Who are we?

It is our mission to be the global leader in inspiring and supporting people to go on courses that will change their lives.

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- ▶ Audience of 66 million visitors a year
- ▶ 12 international websites guiding and inspiring every person to find the right course for them
- ▶ 300 staff worldwide – London, Delhi, Chennai, Boston & Sydney
- ▶ Hotcourses foundation in Kenya supports education of over 1250 children each year who have been affected by HIV



**hotcoursesabroad.com**  
for students looking to study abroad

**hotcourses** **Training**  
AND **COURSES**





[ **postgraduate** search ]

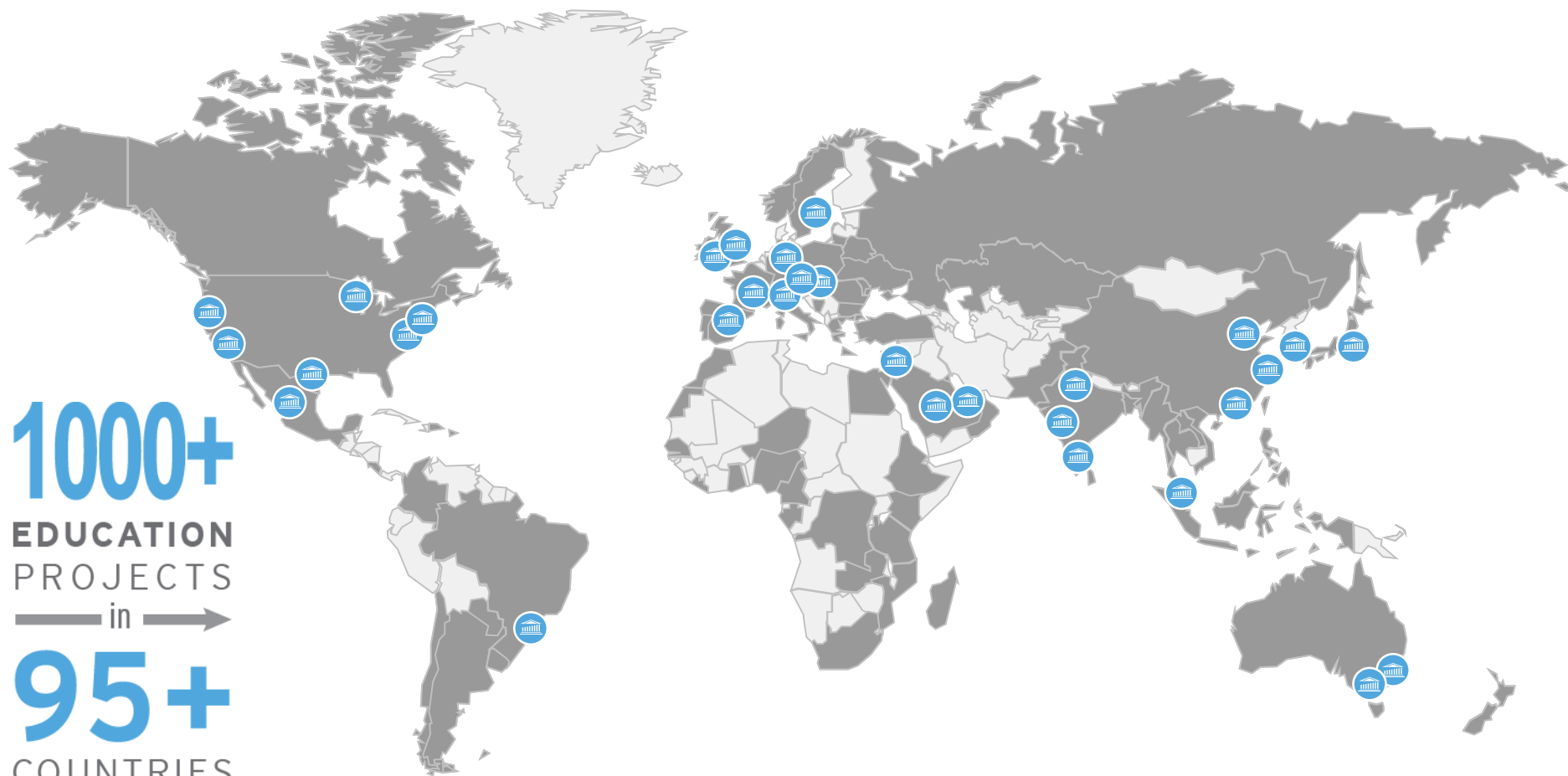


HOTCOURSES **foundation**  
Registered Charity Number 1104396

# Introduction to Parthenon-EY

Parthenon-EY has completed more than 1,000 education projects in over 95 countries and in every education sector

-  Parthenon-EY offices
-  Education projects completed by Parthenon-EY



**1000+**  
EDUCATION  
PROJECTS  
in  
**95+**  
COUNTRIES

Pre-Kindergarten  
and K-12 Schools

Vocational and  
employability

University

Career and  
professional

Education support service  
(e.G., Assessment, test prep,  
publishing, ed-tech etc.)

## Survey Background

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- ▶ Survey of 2,700 prospective international students.
- ▶ Concentrated in countries where agents are not widely used in the University application process. Key source countries include: Indonesia, Brazil, Vietnam and Thailand
- ▶ The aim of the survey was to understand what mode of study is attractive for these students in terms of online, blended etc.

# Survey

## Distance & online

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Distance and online education has hitherto been a niche, but growing, provision of degrees

Parthenon-EY believe we are approaching an inflection point, where distance and online education will gain significant traction as a delivery method of undergraduate degrees

Parthenon-EY's conjoint survey yielded five main student clusters, with Online Learners emerging as a new segment

- ▶ ~80% of Universities in the UK have fewer than 10% total enrolments in distance / online courses
- ▶ Those institutions with a focus on distance / online (with the exception of the OU) have tended to use Online Programme Managers (OPMs) who manage the online qualification process
- ▶ The use of OPMs has increased in the UK with 9 partnerships in 2016
  
- ▶ Those Universities with the largest programmes e.g. University of Liverpool and the University of Roehampton have focused on post graduate qualifications. However, our analysis would indicate there is also an appetite from international undergraduate students for an online / blended solution at this level of study
  
- ▶ Elite Students
- ▶ Quality Conscious
- ▶ Online Learners (emerging segment)
- ▶ Experience Seekers
- ▶ Job Prospectors

# Survey

## Parthenon and HotCourses conducted an online conjoint survey of ~2.7K prospective students

### Survey respondent demographics

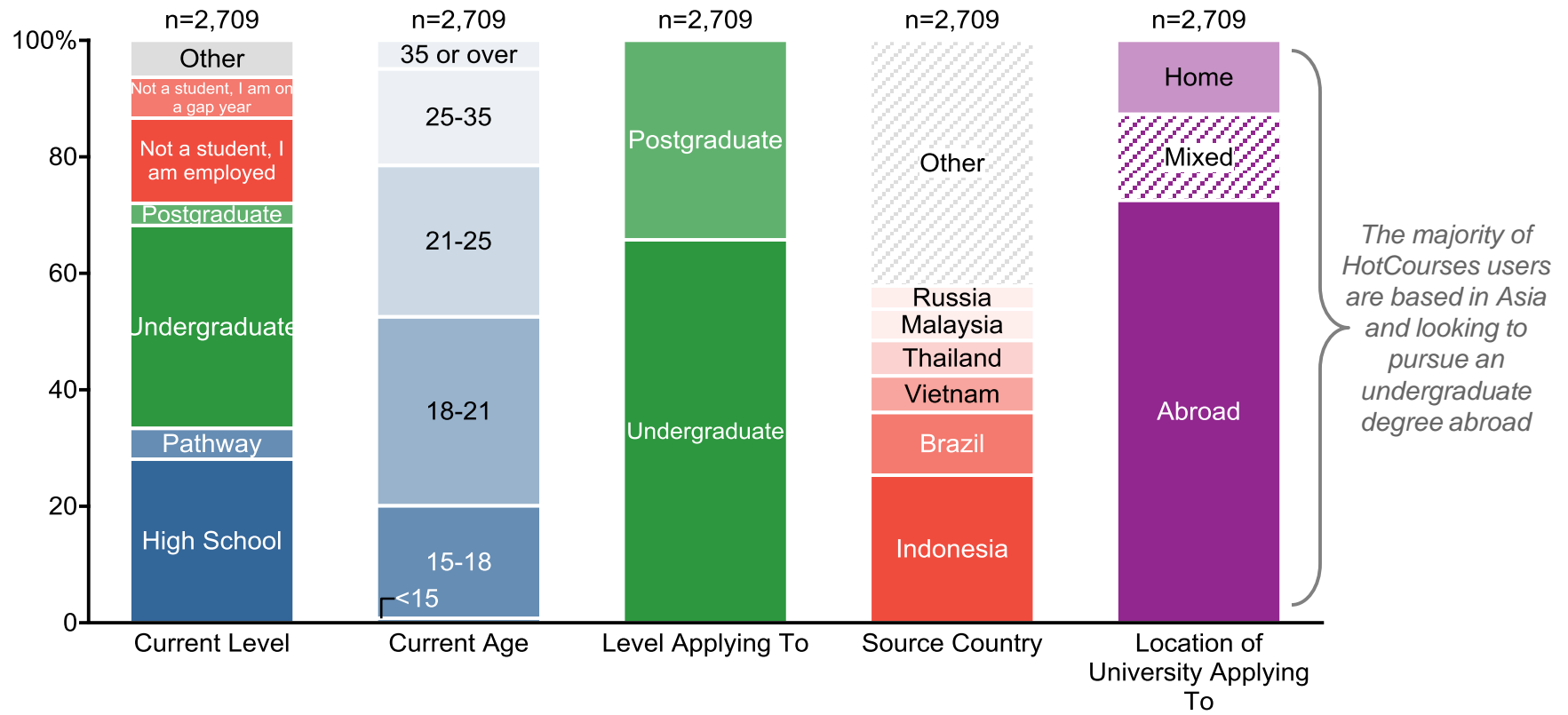
Q: At what level are you currently studying?

Q: What is your current age?

Q: What level of university course are you looking to apply to?

Q: What is your country of origin / permanent residence?

Q: Where are you thinking of applying to university?

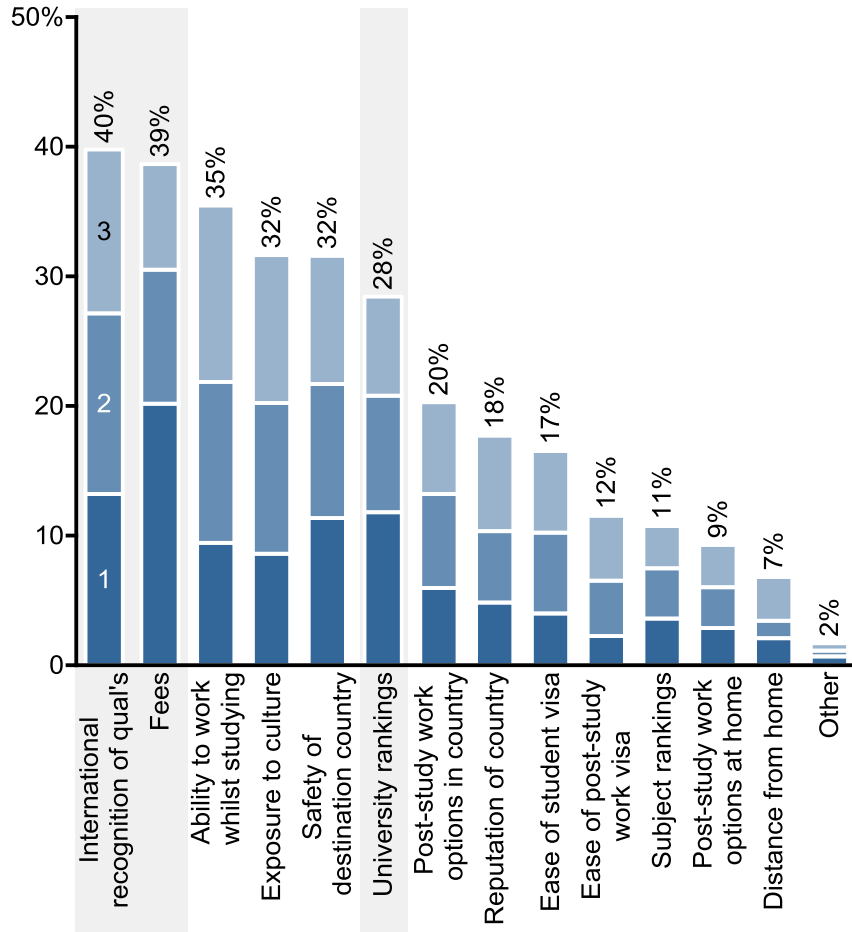


Source: Parthenon-EY-HotCourses Online Student Survey June 2016 (n=2,709)

## The survey confirmed a number of trends in global HE, including the continued preference amongst international applicants to study in Anglophone countries...

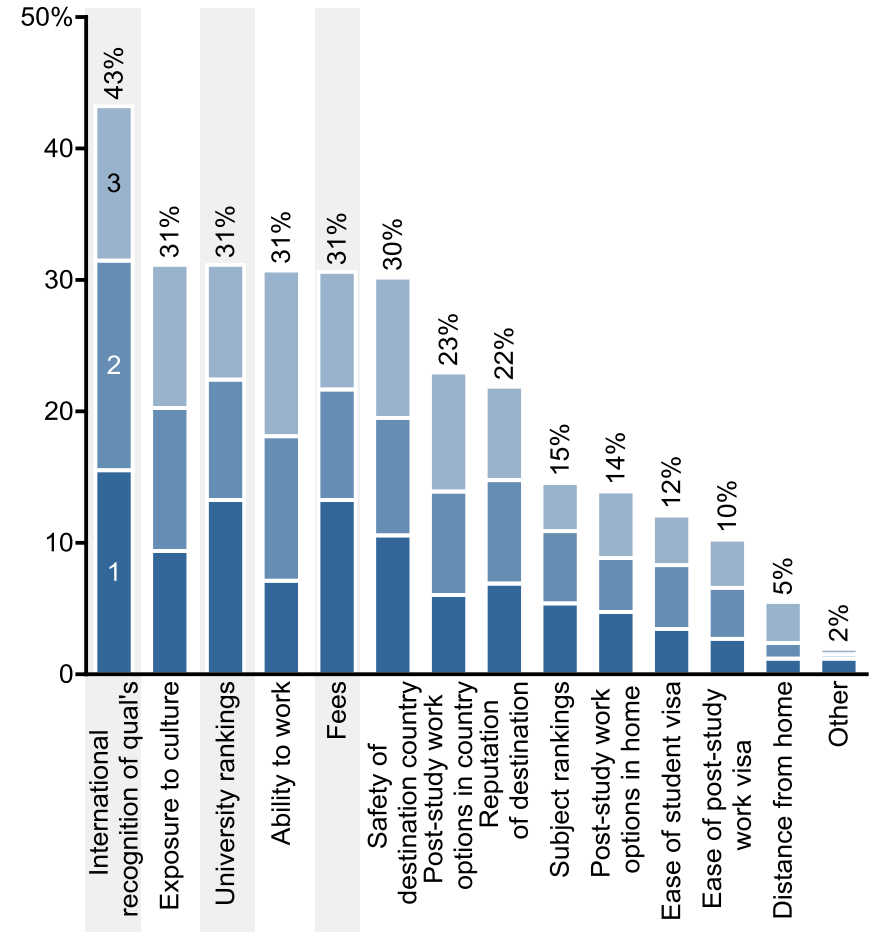
### Most important selection criteria for destination country, Undergraduate respondents only

Q: When thinking about destination countries, what are the most important criteria in making your decision? Please rank the top 3 factors.



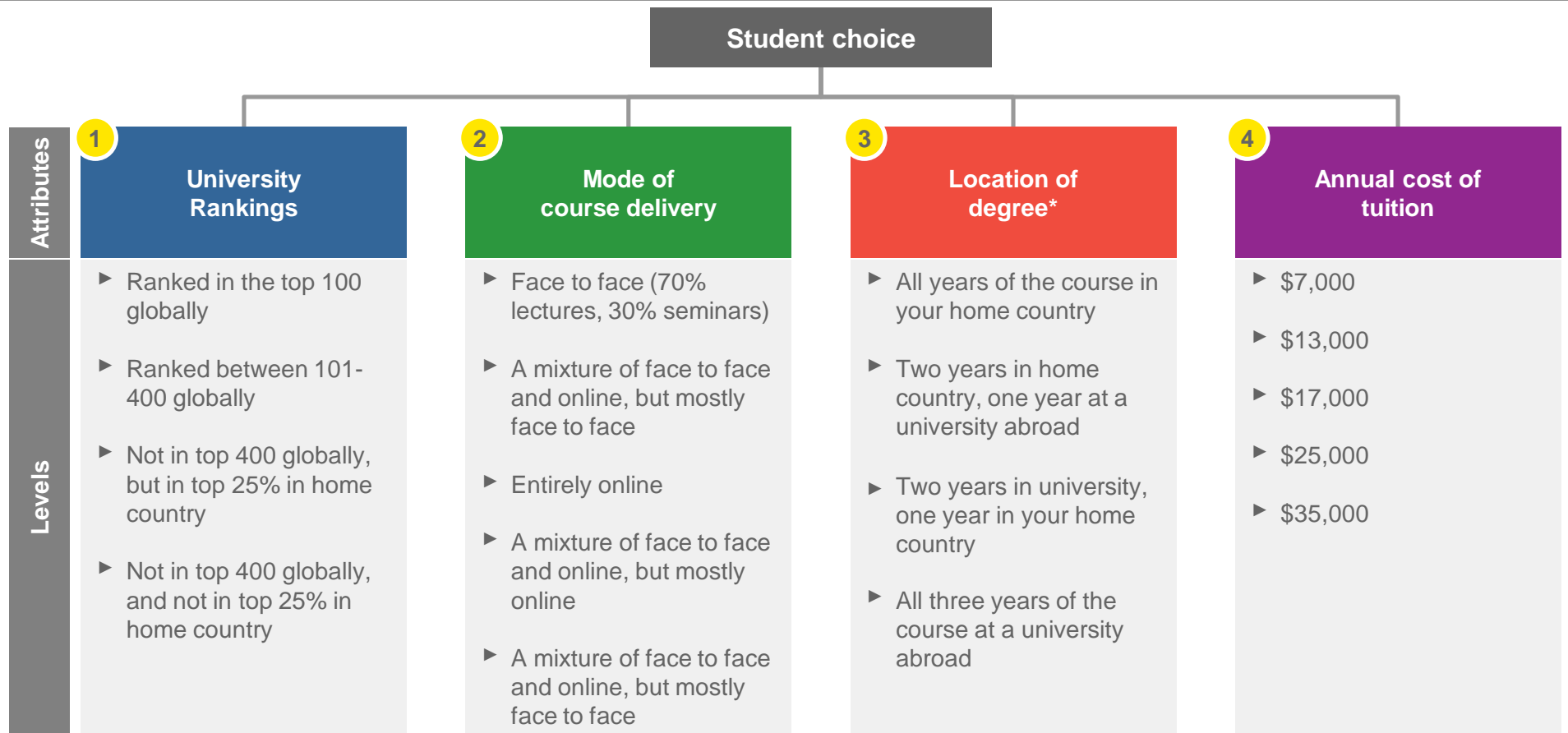
### Most important selection criteria for destination country, Postgraduate respondents only

Q: When thinking about destination countries, what are the most important criteria in making your decision? Please rank the top 3 factors.



# Conjoint

A conjoint survey was designed to test four components of an international student's decision process and their preferred mode of study (online, location of degree)

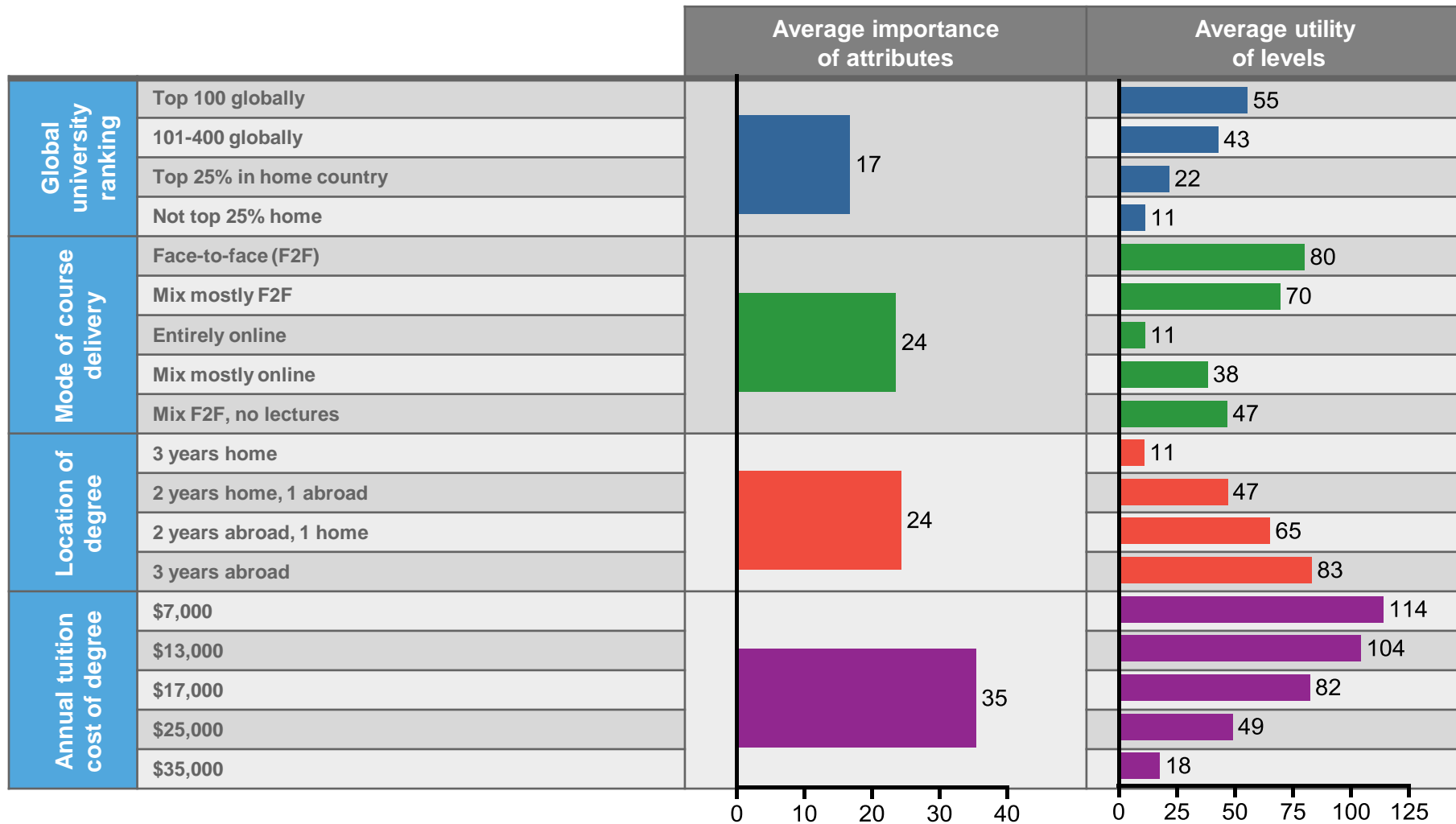


Respondents are shown 3 'university options' with random Levels assigned from the above Attributes and asked to choose the option they most prefer. Each respondent will go through this exercise 8 times. The data is then analysed to understand what trade-offs respondents would rather make, and therefore which of the above attributes and levels are most important to them when making their choice.

Note: \*Given the shorter length of postgraduate degrees, only 3 levels were tested in the 'Location of Degree' Attribute. The options were 'entire degree at home', 'mixed course' and 'entire degree abroad'

# Conjoint

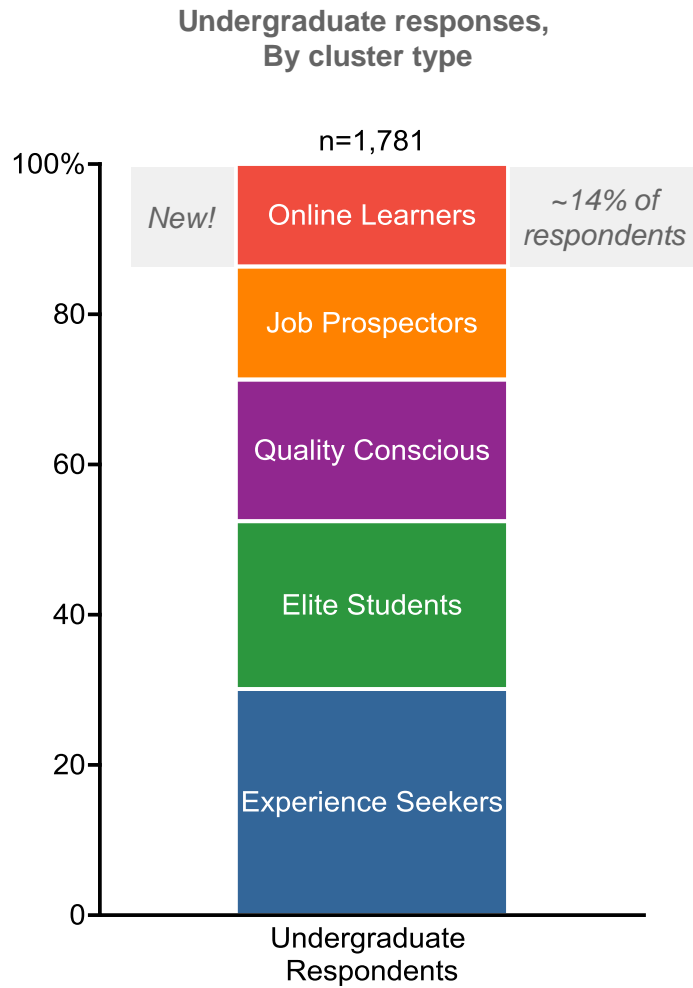
Overall, Undergraduates prioritised cost of degree and cared least about ranking. Students greatly preferred a classical F2F degree with 3 years abroad





# Conjoint

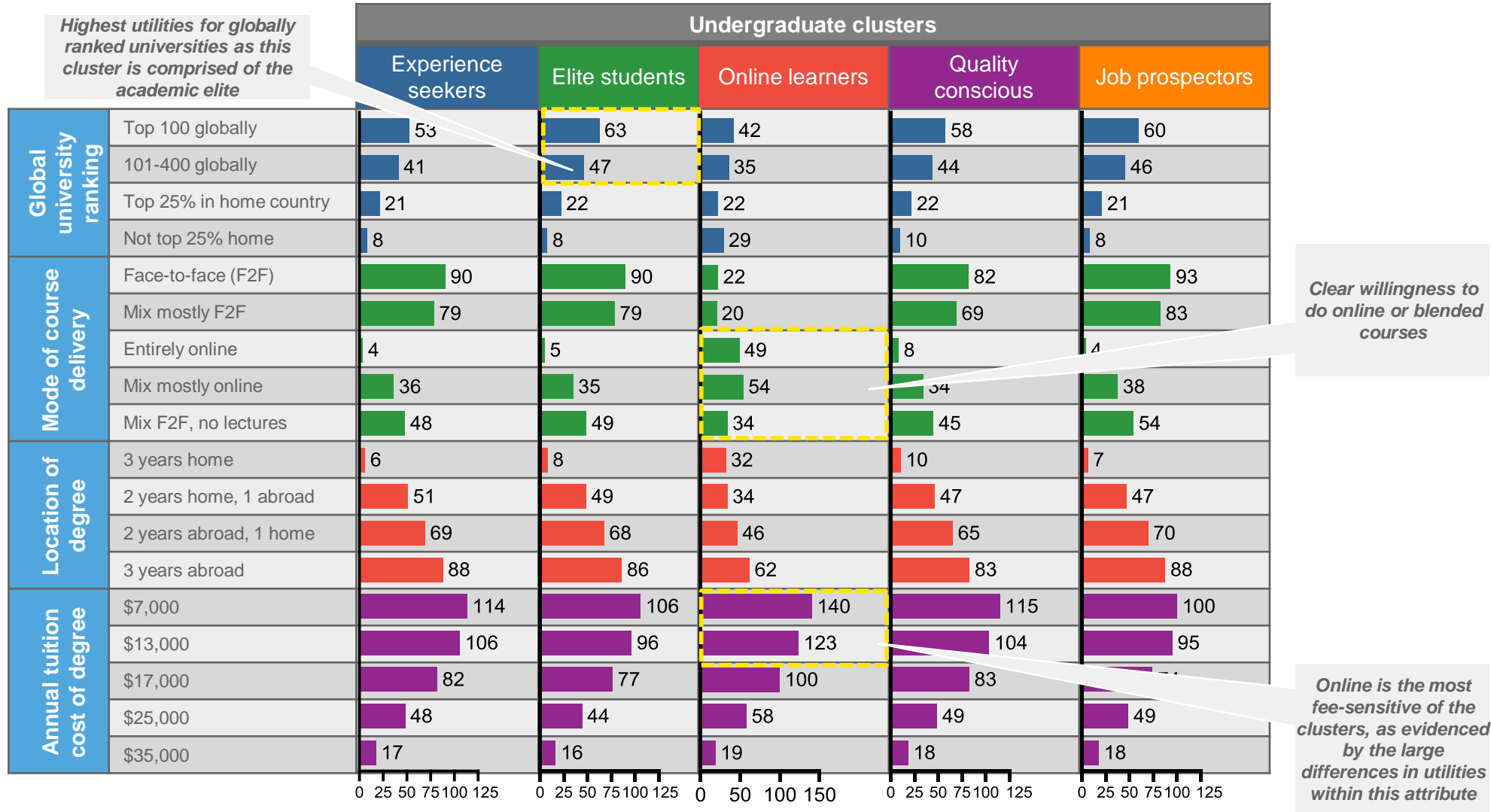
However, when separating respondents into clusters, a new segment emerged on top of the traditional international students, preferring online degrees



Cluster name	Cluster description
<b>Online learners</b>	► This segment is comprised of those students that are <b>most amenable to studying online</b> , either in a blended or pure-play format. They are <b>very fee sensitive</b> , and <b>not particularly sensitive to institution rankings</b>
<b>Job prospectors</b>	► This segment is comprised of <b>students focusing on securing employment</b> after their degree. Their motivation to go abroad is driven entirely by their conviction that universities abroad will place them at an advantage when searching for a job. This student group tends to be <b>weaker academically</b> than the other clusters, with a stronger <b>subject interest in Business / Management</b> courses
<b>Quality conscious</b>	► This segment is comprised of students that are <b>reluctant migrants</b> . They are pushed out of their country of origin because of the <b>poor quality / reputation of domestic HEIs</b> . They are similar to 'Experience Seekers' in most ways except for their motivation, which is driven less by wanting to experience living abroad and more by having a lack of decent alternatives in their home country
<b>Elite students</b>	► This segment is comprised of the <b>top international students</b> who are looking for an elite international academic experience. They are more likely to <b>want to continue their education with a second degree</b> , and are skewed towards <b>Engineering and Medicine</b> as subject interests
<b>Experience seekers</b>	► This segment is comprised of the ' <b>classic / traditional</b> ' international students. Predominantly Chinese, <b>above average student that will not qualify for a domestic elite university</b> . Have strong desire to go to the best university possible abroad. <b>Preference for F2F teaching</b> , and <b>looking to stay overseas upon completion of their degree</b> . This segment has the <b>highest proportion of students interested in Humanities subjects</b> , are not particularly budget constrained

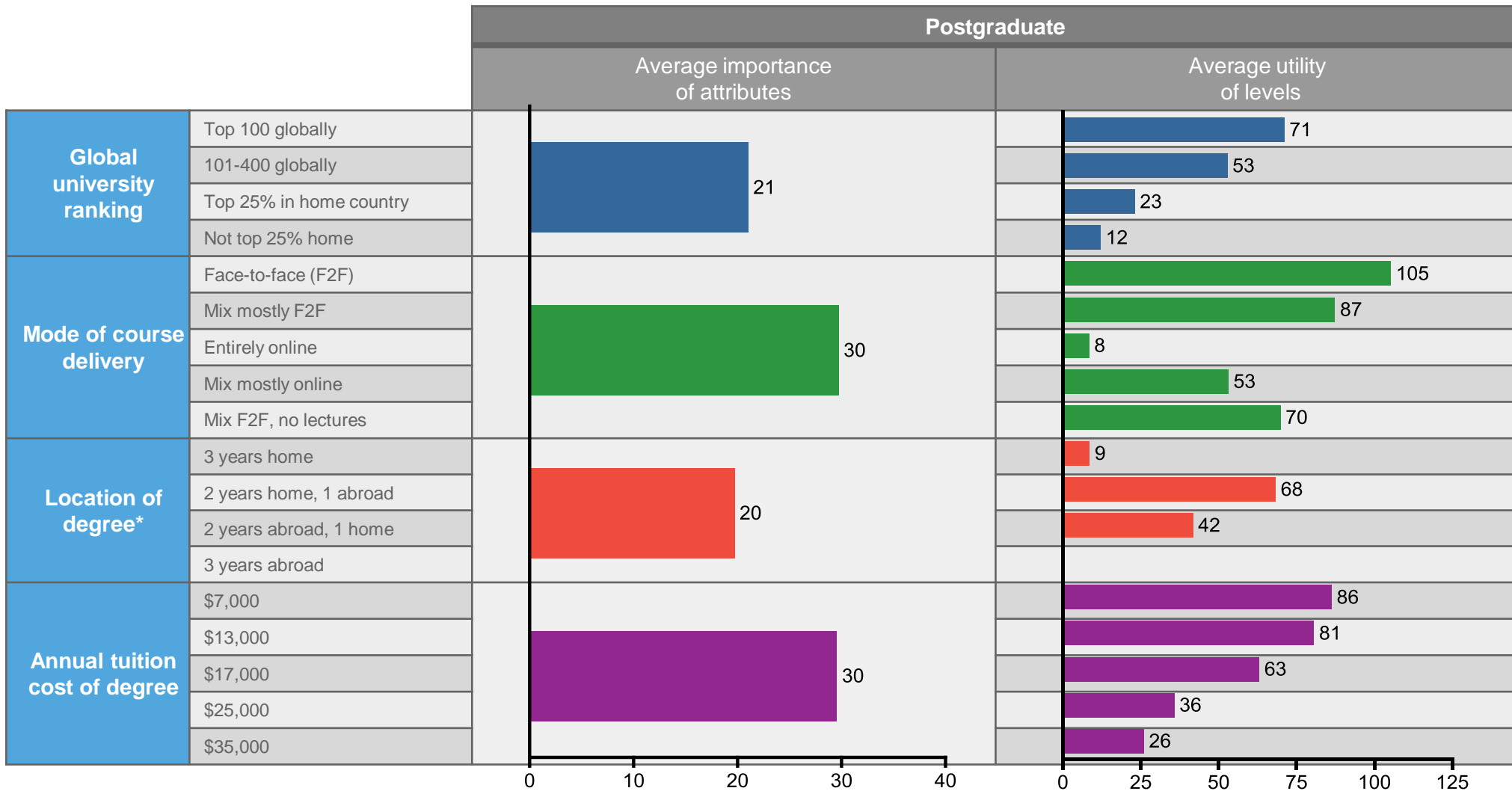
# Conjoint

## This cluster of students is the most fee sensitive



# Conjoint

## International undergraduates are more willing to study a purely online course than postgraduates, who require a blended offering at the least



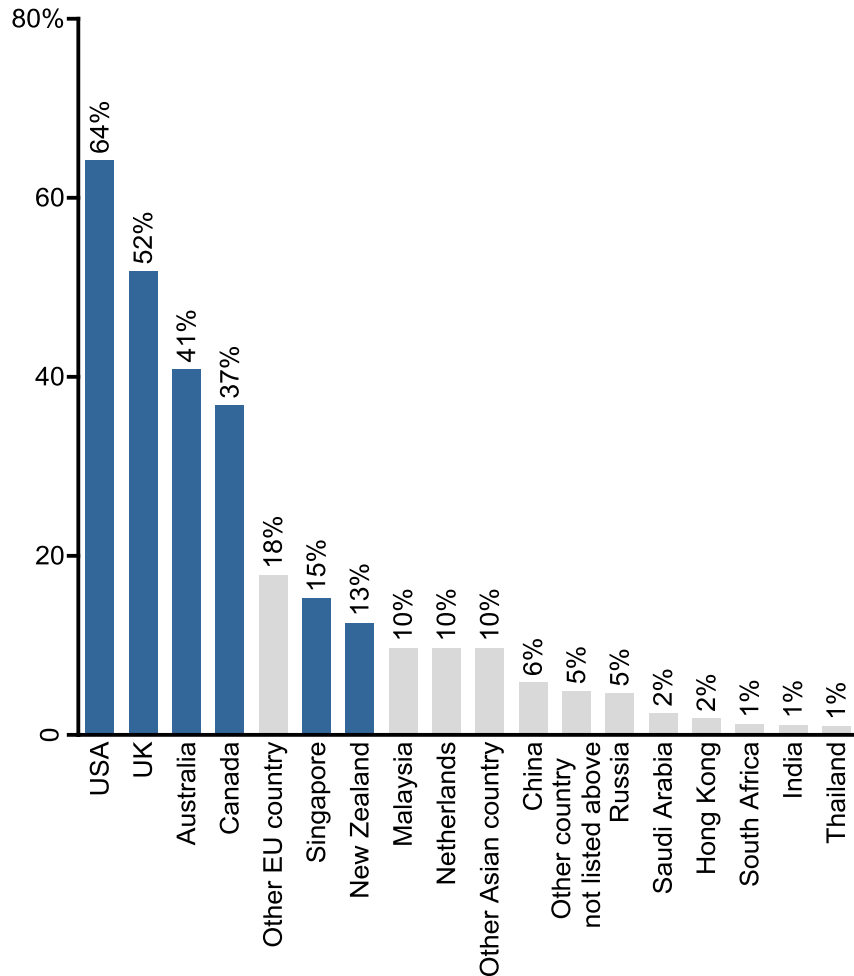
Note: \*Given the shorter length of postgraduate degrees, only 3 levels were tested in the 'Location of Degree' Attribute. In order from top to bottom, the options were 'entire degree at home', 'mixed course' and 'entire degree abroad'

# Appendix

## USA, UK and Australia consistently rank as top 3 preferred destinations countries

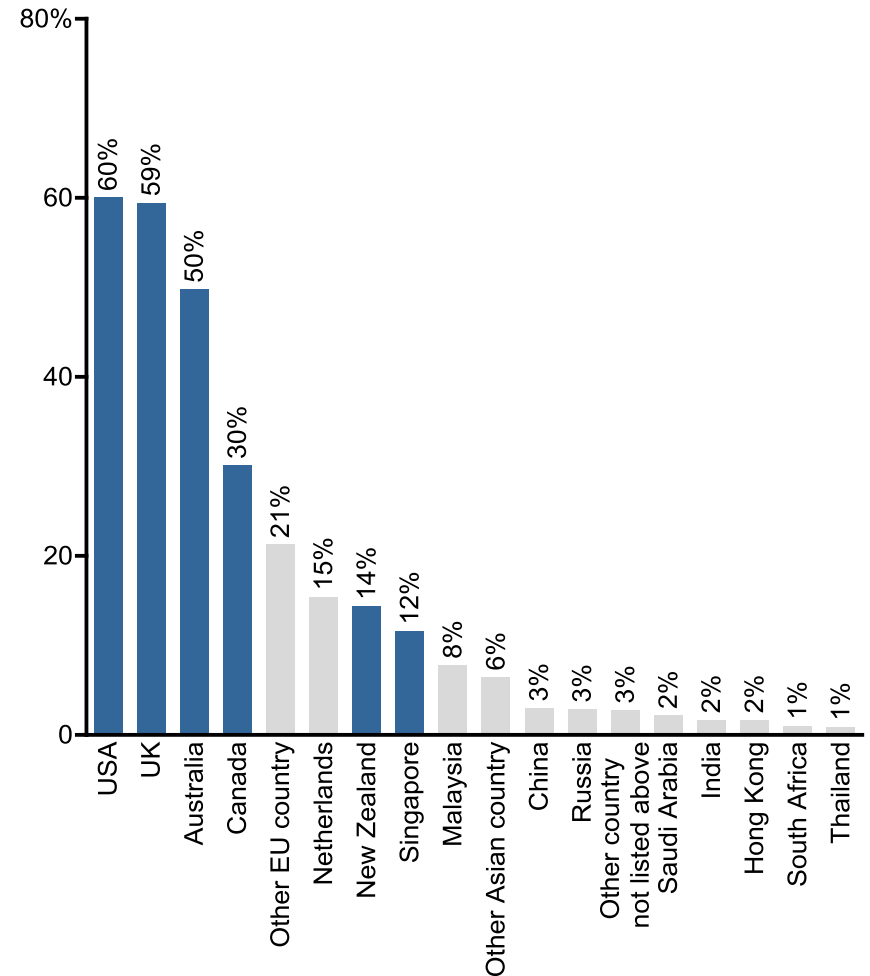
### Preferred destination country, Undergraduate respondents only

Q: Where abroad would you like to apply to university?  
Please rank your top 3 destinations in order of preference.



### Preferred destination country, Postgraduate respondents only

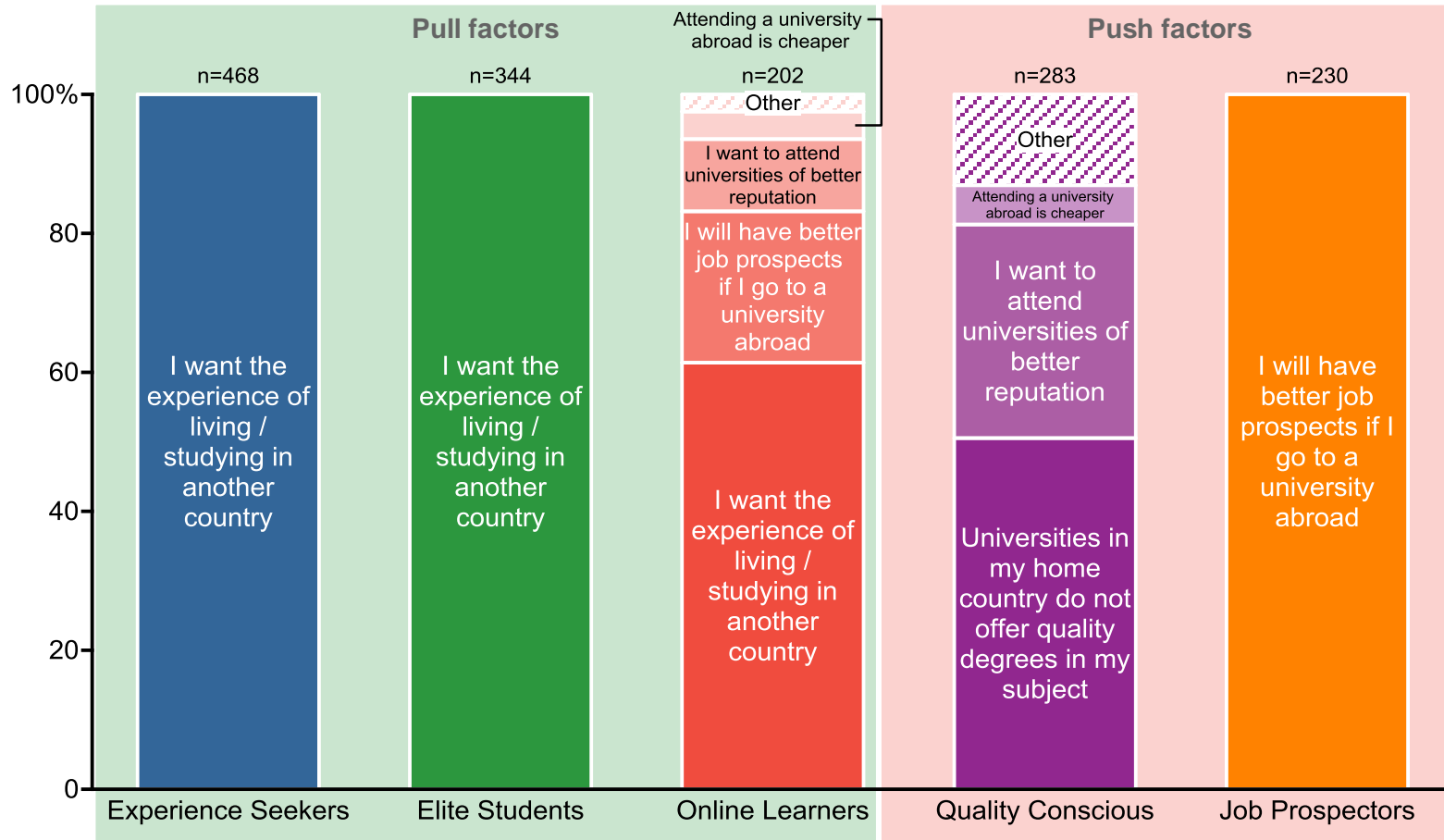
Q: Where abroad would you like to apply to university?  
Please rank your top 3 destinations in order of preference.



# Appendix

The 'push' factor is evidently stronger when respondents are asked where they want to study – over 70% of both clusters want to study abroad

Primary motivation for studying abroad, by cluster type  
 Q: What is your primary motivation for going to study abroad?

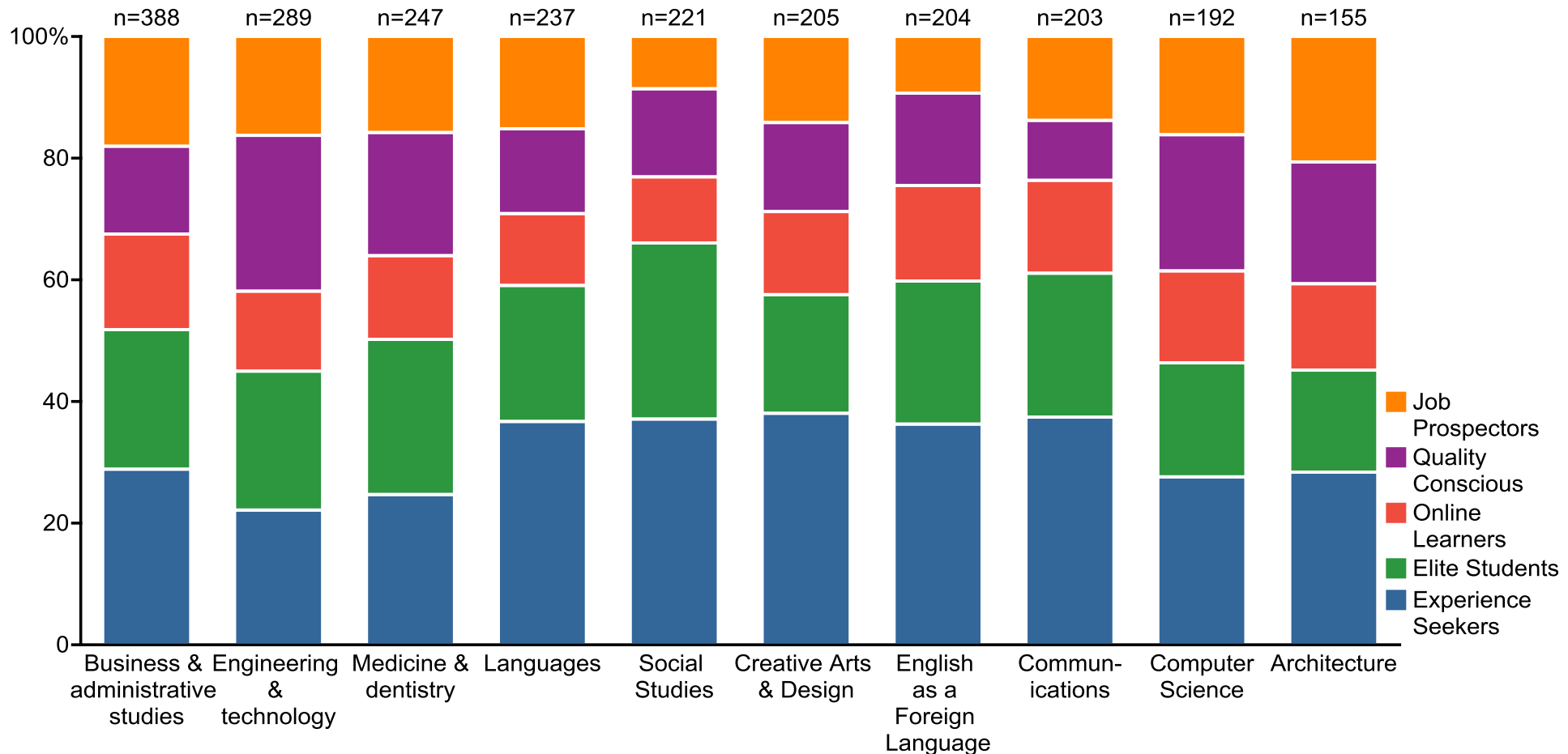


# Appendix

## Subject Interest by Cluster

Primary subject interest, by cluster type

Q: What subjects are you looking to study at university? Please select no more than three options.



# Appendix

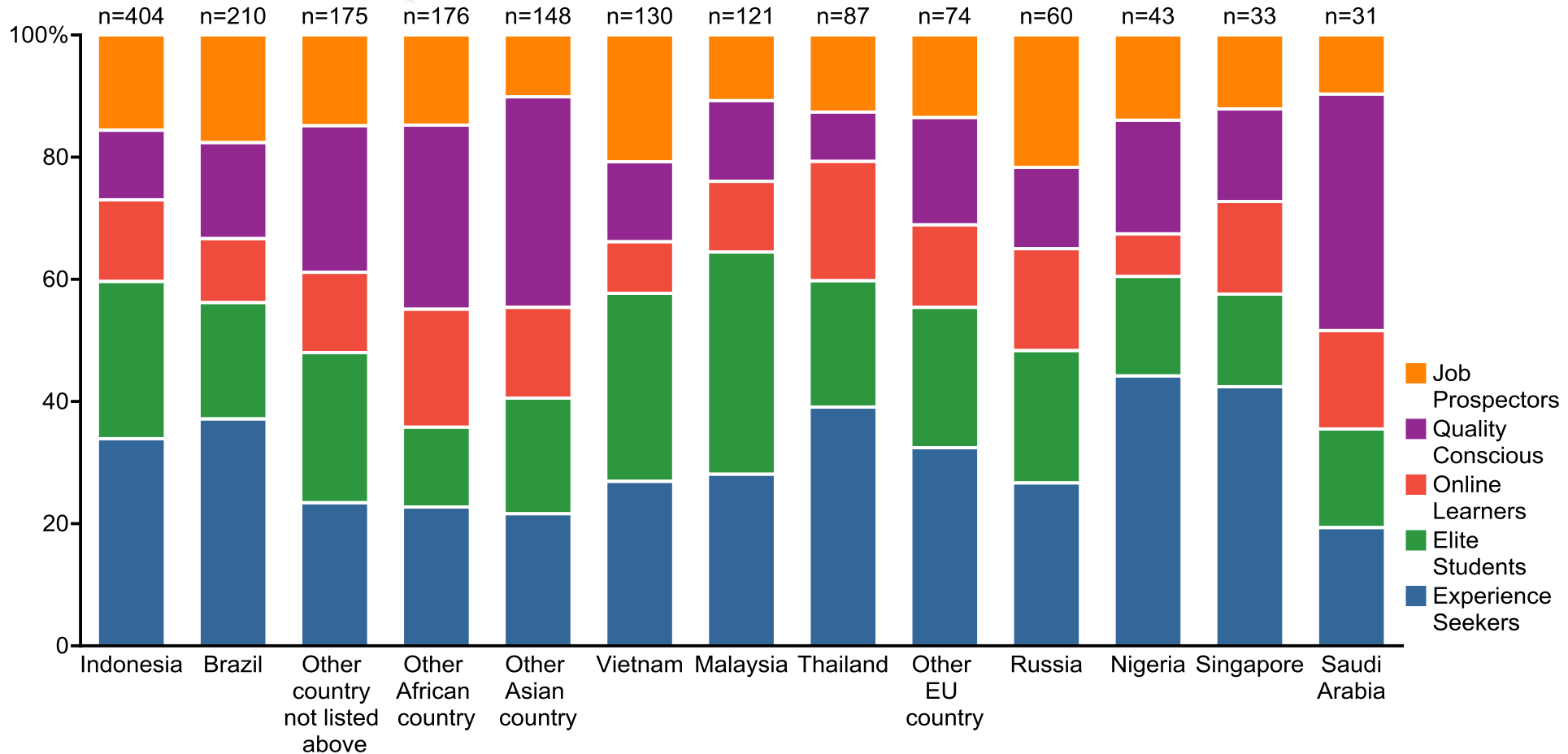
## Student Country of Origin

Student country of origin, by cluster type

Q: What is your country of origin / permanent residence?

Other countries include Venezuela (48), Colombia (16)

Other countries include Egypt (45), Algeria (26)

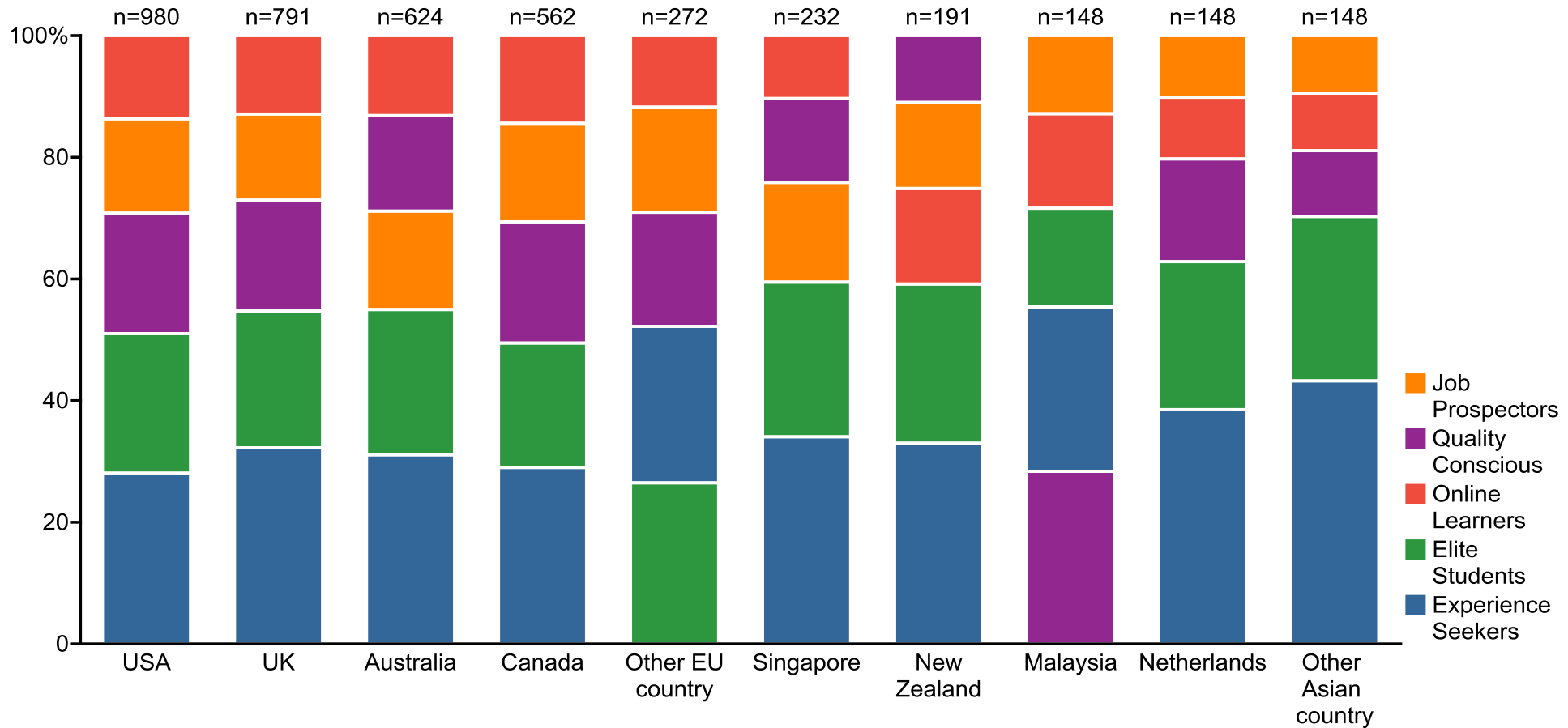


# Appendix

## Preferred Destination Country

Preferred destination country, by cluster type

Q: Where abroad would you like to apply to university? Please rank your top 3 destinations in order of preference.



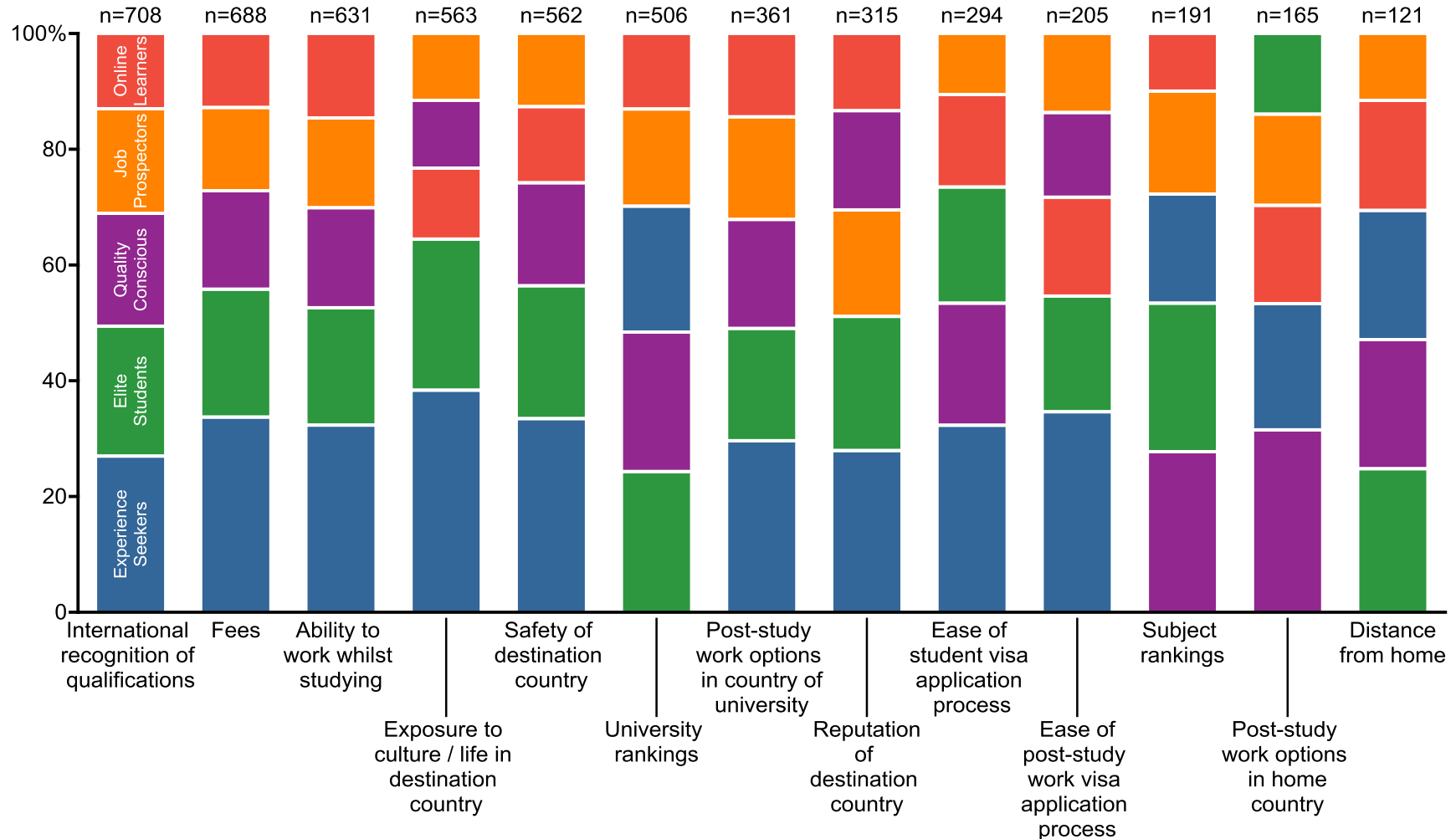


# Appendix

## Most Important Criteria for Destination Country

Most important selection criteria for destination country, by cluster type

Q: When thinking about destination countries, what are the most important criteria in making your decision? Please rank the top 3 factors.



## Any questions?

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- ▶ [Aaron.porter@hotcourses.com](mailto:Aaron.porter@hotcourses.com)
- ▶ [MRobb@parthenon.ey.com](mailto:MRobb@parthenon.ey.com)

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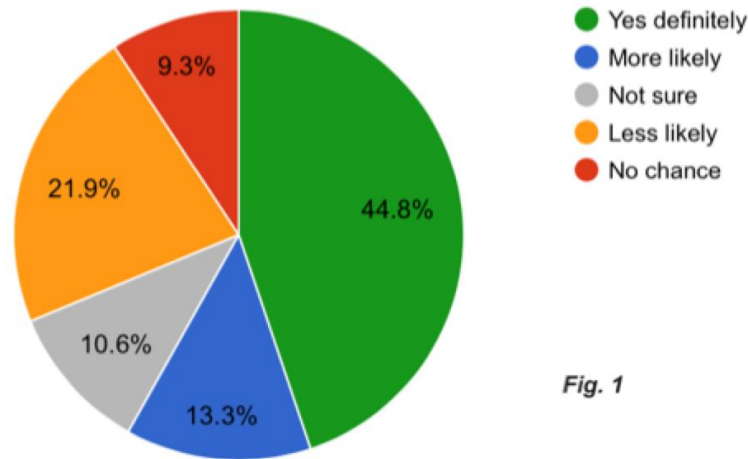
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# International student survey – Trump effect

- 44.8% still confident heading to the US (+13.3% more likely to study)
- 32.2% less likely or now 'no chance' of heading to the US

**Will you still consider studying in the US? (HC Overall)**



*Fig. 1*

# Country by country

Smallest negative impact in Russia (11+7%)

Biggest negative impact in Vietnam (31+10%)

Would you still consider studying in the US? (by site)

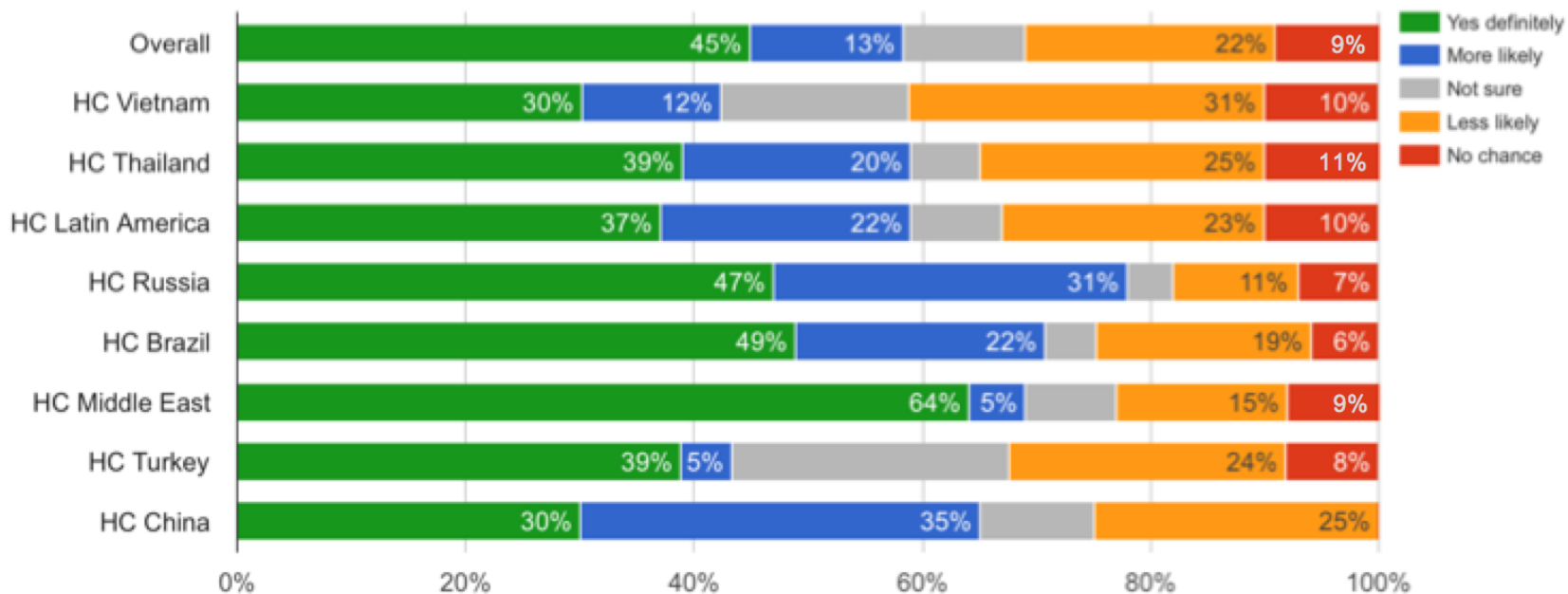


Fig. 2

# Session 3: Panel analysis on the international student landscape – across the spectrum


Mostafa Rajaai, International Students' Officer, NUS

Ian Koxvold, Head of Education Strategy, PwC

Steve Phillips, Chair, English UK

Stephen Carey, British Council IELTS

CHAIR: Amy Baker, PIE News

The background features a collage of various images related to education and industry. Text overlays include "Unsure what to study?", "Agriculture", "Law", "Creative arts", "Architecture", "Computer science", "where can you study?", and "USA".

# Session 4: Tracking trends in international student demand using insights

Simon Emmett

# Session 5: Debate, UK higher education will be better off in the long run post Brexit

Propose: Professor Gwythian Prins, Emeritus Professor,  
LSE

Oppose: Professor Michael Arthur, Provost & President,  
University College London



# Session 6: Where next for international recruitment and internationalisation?

Delyth Chambers, Warwick University

Mark Leach, Wonkhe

Enzo Raimo, Reading University

Lil Bremermann-Richard, BPP University