



Universities UK
International

INTERNATIONAL STUDENT RECRUITMENT: WHY AREN'T WE SECOND?

PART 1

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CONTENTS

INTRODUCTION	3
CONTEXT	4
1. PATTERNS OF INTERNATIONAL STUDENT MOBILITY	6
2. THE UK'S INTERNATIONAL STUDENT RECRUITMENT PERFORMANCE	16
3. IMPLICATIONS OF THE COVID-19 PANDEMIC	27
4. RECOMMENDATIONS FOR PRACTITIONERS AND POLICY MAKERS	32
5. ANNEX A: UK MARKET SHARE IN 2010 AND 2017 AND CHANGES IN ITS MARKET POSITION	36

INTRODUCTION

UUKi has long been in conversation with members and government about how to enhance the UK's international student recruitment performance.

In 2019, UUKi commissioned Janet Ilieva, Director of Education Insight, to analyse:

- changing patterns of international student mobility
- how UK international student recruitment compares to other countries' performance
- recruitment from the world's top 21 sending countries and territories: how the UK could do better.

Just as this study was nearing completion, Covid-19 shook the world, with massive short and mid-term implications for international student recruitment.

This slide deck therefore now has two main components:

1. Analysis of international student mobility patterns and recruitment performances pre-Covid-19, as this is still relevant to understanding global student recruitment and improving long-term strategies.

2. Lessons learnt from the Asian financial crisis in the late 1990s and the Sars epidemic in 2002/3, which may shed light on the potential impacts of the pandemic on recruitment in the short and mid-term.

Both analyses should be considered together. While present circumstances require extraordinary measures, the developments of the last decade offer clear insights affecting strategy post-Covid-19.

CONTEXT

The UK has been the second most popular international student destination (after the US) for many years, but competition is increasing.

The UK's direct competitors are showing significantly stronger year-on-year growth and are developing larger market shares from key countries. Additionally, new study destinations are emerging due to a shift towards intra-regional mobility – often facilitated by Transnational Education (TNE) provision.

To strengthen UK international student recruitment, the government made two crucial announcements:

- In March 2019, the government's new International Education Strategy stated an ambition to increase education exports to **£35 billion** per year, and the number of UK-hosted international students to **600,000** per year, both by 2030.
- In September 2019, a two-year post-study work route (the 'Graduate Route') was announced, expanding opportunities for talented international

students to build successful careers in the UK. In summer 2020, the scheme was expanded to three years for PhD students.

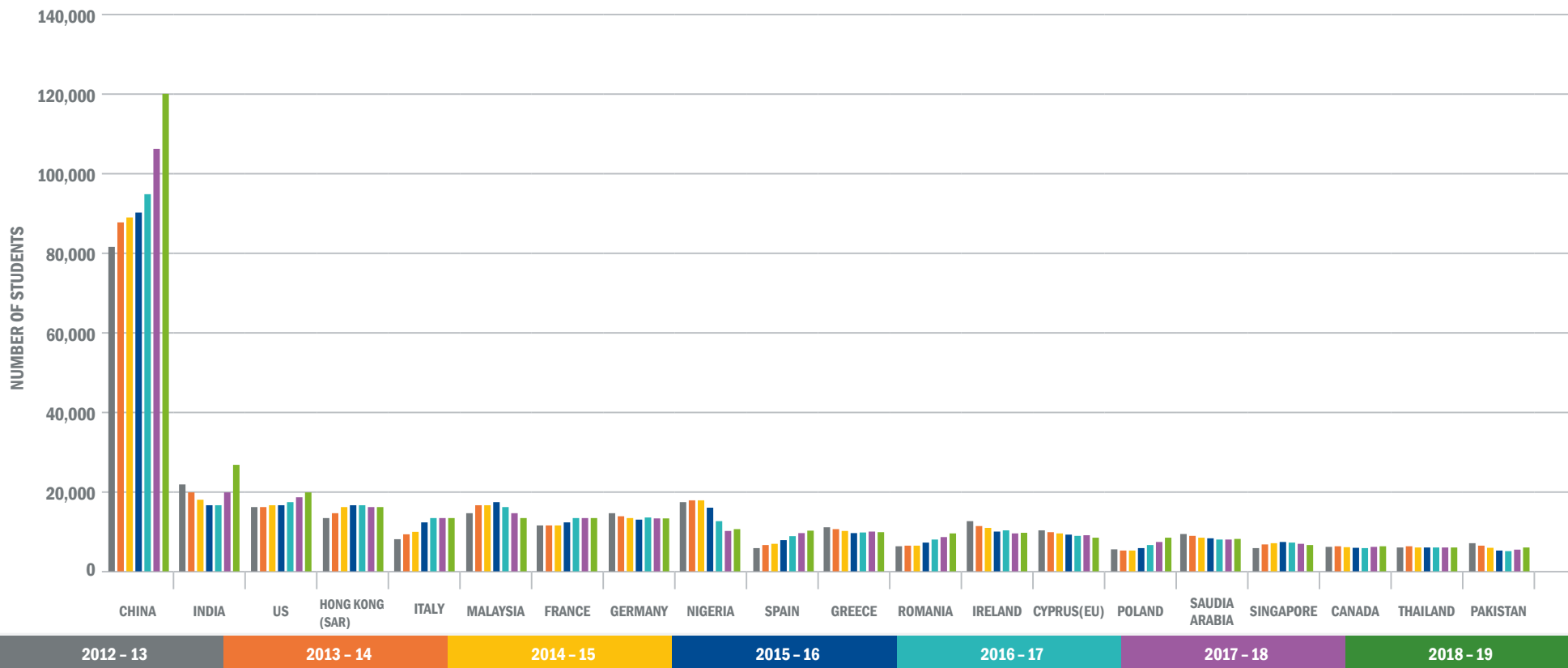
1. Where is UK international student recruitment underperforming and why?
2. On which markets should the sector focus its efforts?
3. Which strategies would work best where?

This presentation explores the following questions:

The final section examines how the Covid-19 pandemic might affect student mobility in the short and long-term and how the sector and government can prepare in order to maintain the UK's competitiveness. The analysis focuses on the world's top 21 sending countries and territories, most of which are also the UK's top domiciles of international students, in the ten-year period since the global financial crisis, 2007–2017.

WHERE DO INTERNATIONAL STUDENTS IN THE UK COME FROM?

FIGURE 1: TOP 20 DOMICILES OF INTERNATIONAL STUDENTS IN THE UK (BY 2018 - 19 RANK)



Data source: HESA student record, multiple years.

1

PATTERNS OF INTERNATIONAL STUDENT MOBILITY

OVERVIEW

For many years, the US, the UK and Australia have been the top three destinations for international students. But global student mobility has begun to shift.











Growth in UK international student numbers dropped to **0.3%** in 2016 and only slightly recovered up to **0.9%** in 2017. Also, the UK's market share has dropped in 17 of the 21 top sending countries.

- After a significant drop until 2013, **Australia** has seen steady year-on-year growth of around **14%** and might soon catch up with the UK. **Canada** is also seeing steady growth of its market share in several top sending countries and territories.

- New popular study destinations have been emerging in **Africa** (e.g. **Ghana**) and **Asia** (especially **Malaysia**) due to stronger regional mobility, in part facilitated by enhanced TNE provision.
- The UK's reputation for excellence in research and teaching and its historically strong connections around the world place it in a strong position. But to keep competing with the top destinations and to reach **600,000** students by 2030, recruitment must improve.

WHICH ARE THE MOST POPULAR DESTINATIONS FOR INTERNATIONAL STUDENTS?

TABLE 1: TOP STUDY DESTINATIONS, STUDENT NUMBERS AND MARKET SHARE

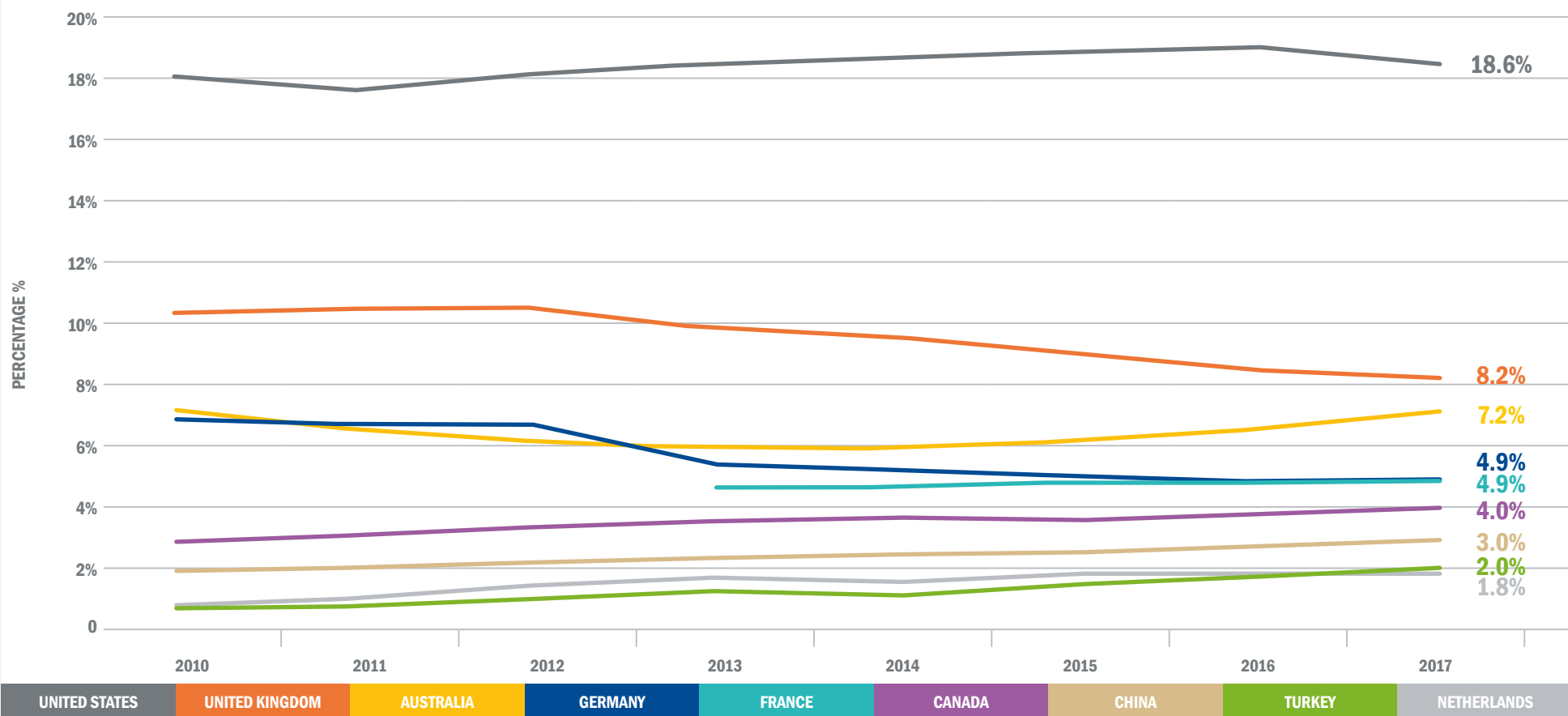
RANK	COUNTRY	INTERNATIONAL STUDENTS 2017	% CHANGE 2016 - 2017	INTERNATIONAL EDUCATION MARKET SHARE 2017
1	 United States	984,898	1.4%	18.6%
2	 United Kingdom	435,734	0.9%	8.2%
3	 Australia	381,202	13.6%	7.2%
4	 Germany	258,873	5.9%	4.9%
5	 France	258,380	5.3%	4.9%
6	 Russia	250,658	2.8%	4.7%
7	 Canada	209,979	10.8%	4.0%
13	 Netherlands	96,289	7.1%	1.8%
24	 New Zealand	52,678	-2.2%	1.0%
42	 Ireland	19,983	11.7%	0.4%

Data source: UIS.Stat, March 2020

- The UK was the **second** most popular destination in the world for international students in 2017.
- With a mere **0.9% growth**, despite burgeoning numbers of internationally mobile students around the world, the UK's performance contrasts starkly with that of its competitors.
- For example, the numbers of international students choosing **Australia, Canada, the Netherlands** and **Germany** grew by **13.6%, 10.8%, 7.1%** and **5.9%** respectively from 2016 to 2017.
- The UK's market share was at a high of **10.5%** in 2012 but dropped to **8.2%** in 2017. This is about half of the US' market share and only **1%** higher than that of Australia.

HOW DID EACH COUNTRY'S MARKET SHARE CHANGE OVER TIME?

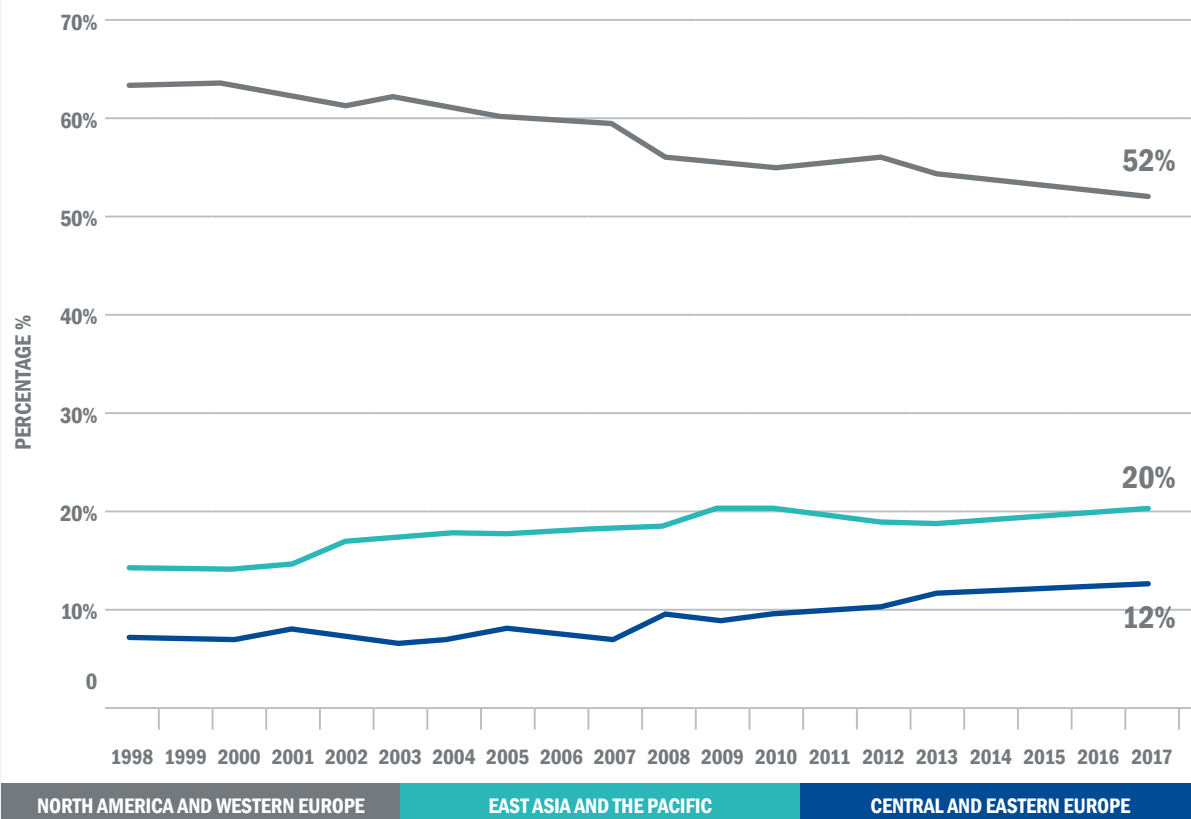
FIGURE 2: MARKET SHARE OF INTERNATIONAL STUDENTS BY COUNTRY, 2010 – 2017



Data source: UIS.Stat, March 2020

HOW HAVE REGIONS CHANGED IN POPULARITY?

FIGURE 3: INBOUND INTERNATIONAL STUDENTS (%) BY MAJOR HOST REGION (1998 – 2017)

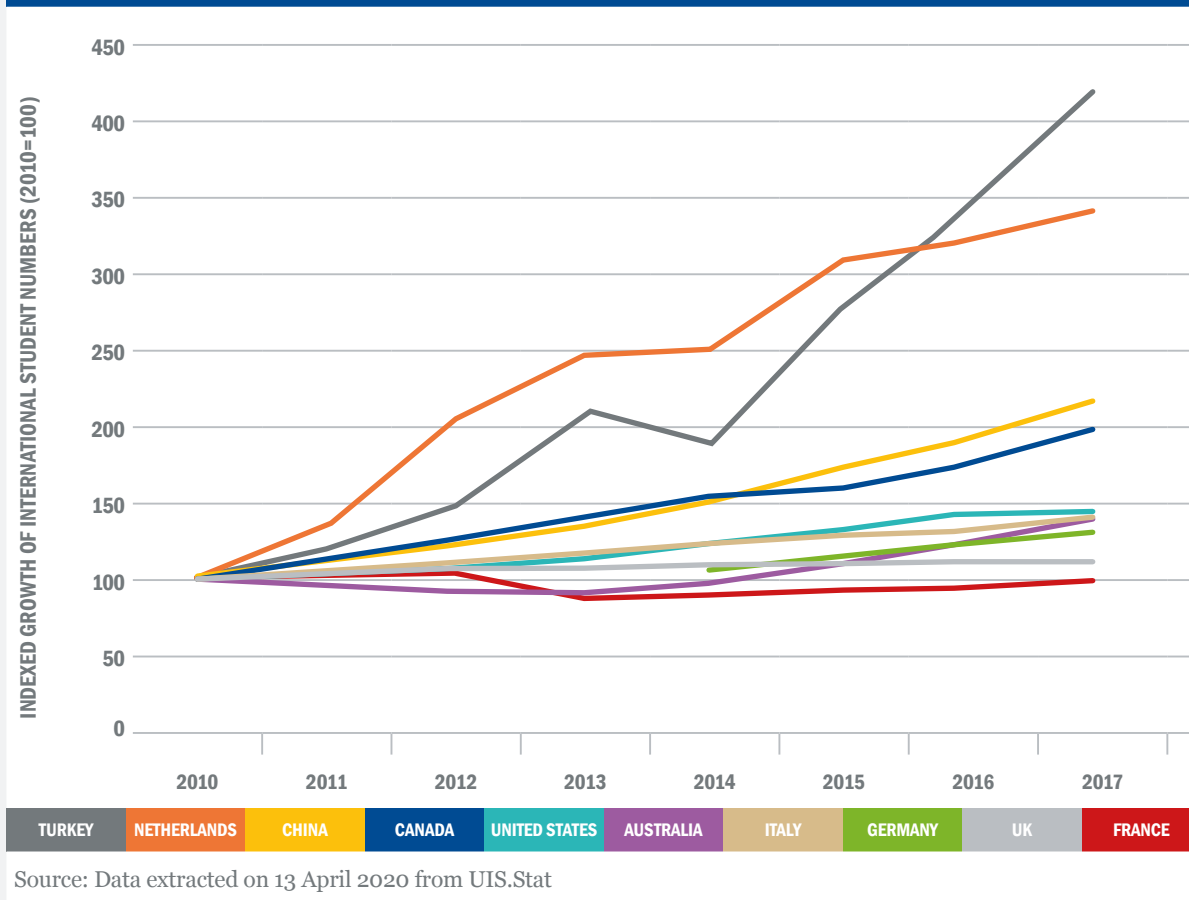


Source: Data extracted on 13 April 2020 from UIS.Stat

- North America and Western Europe's share of international students dropped from **64%** in 1998 to **52%** in 2017.
- East Asia and the Pacific, as well as Central and Eastern Europe, increased their market share by **6%** and **5%** respectively.

WHERE HAVE INTERNATIONAL STUDENT NUMBERS GROWN THE MOST?

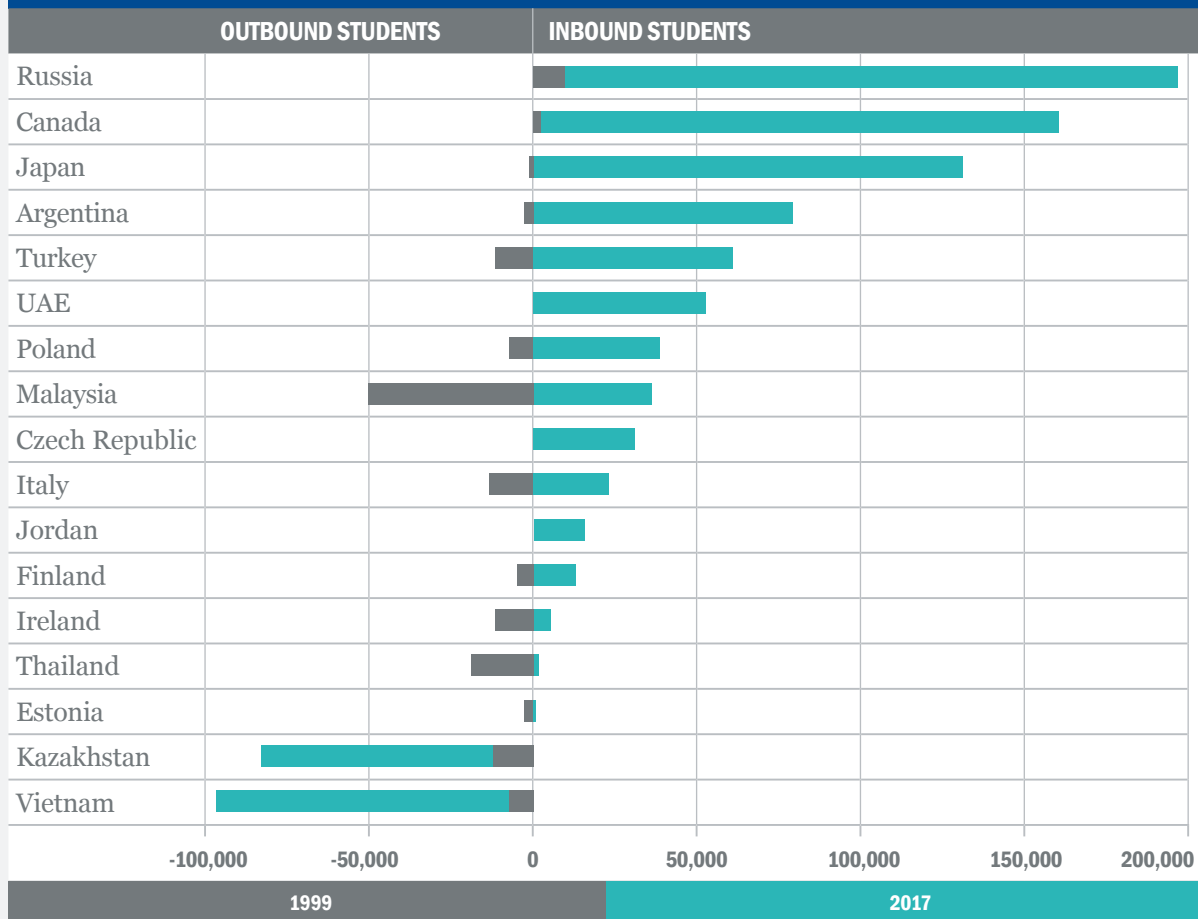
FIGURE 4: INDEXED GROWTH OF INTERNATIONAL STUDENT NUMBERS (2010=100)



- The graph shows the indexed growth of international students from 2010 – 2017.
- The largest growth was in **Turkey**, where numbers quadrupled to **108,000** in 2017, and the **Netherlands**, where the number grew by almost **350%** to **96,000** in 2017.
- **Canada** almost doubled its number of international students, reaching **210,000** in 2017.
- **Australia's** numbers dropped until 2012, but eventually achieved a **40%** growth compared to 2010, with **381,000** students in 2017.
- The **UK**, however, only grew its international student number by around **12%**, to **435,000** students in 2017.

WHERE COULD THE NEXT HOT SPOTS BE FOR INTERNATIONAL HIGHER EDUCATION?

FIGURE 5: SHIFTS IN THE NET FLOWS OF INTERNATIONALLY MOBILE STUDENTS 1999 VS.2017 (INBOUND - OUTBOUND STUDENTS)























Source: Data extracted on 13 April 2020 from UIS.Stat

- The growing competition for students is illustrated by many countries' shift from a net outbound flow of students in the late 1990s to net inbound flow of students. This shift can be seen, for example, in **Turkey, Poland, Malaysia, Thailand**.
- Others – such as **Russia** and **Japan** – have increased their inbound flow of students, and have potential to become regional hubs for international students.

WHAT ARE THE MOBILITY PATTERNS ACROSS COUNTRIES AND TERRITORIES?

TABLE 2: MOBILITY PATTERNS ACROSS COUNTRIES AND TERRITORIES

COUNTRIES AND TERRITORIES WHOSE STUDENTS TEND TO STUDY AROUND THE GLOBE	COUNTRIES AND TERRITORIES WHOSE STUDENTS TEND TO STAY IN THE REGION (>50% OF STUDENTS)
 China	 Vietnam
 India	 Bangladesh
 Hong Kong (SAR)	 Kazakhstan
 Iran	 Indonesia
 Pakistan	 Nepal
 Nigeria	 Brazil
 Malaysia	 Germany
 Saudi Arabia	 Italy
 South Korea	 France
 US	 Russia
	 Ukraine

Data source: UIS.Stat, March 2020

A close examination of the world's largest sending countries identifies two types of student mobility:

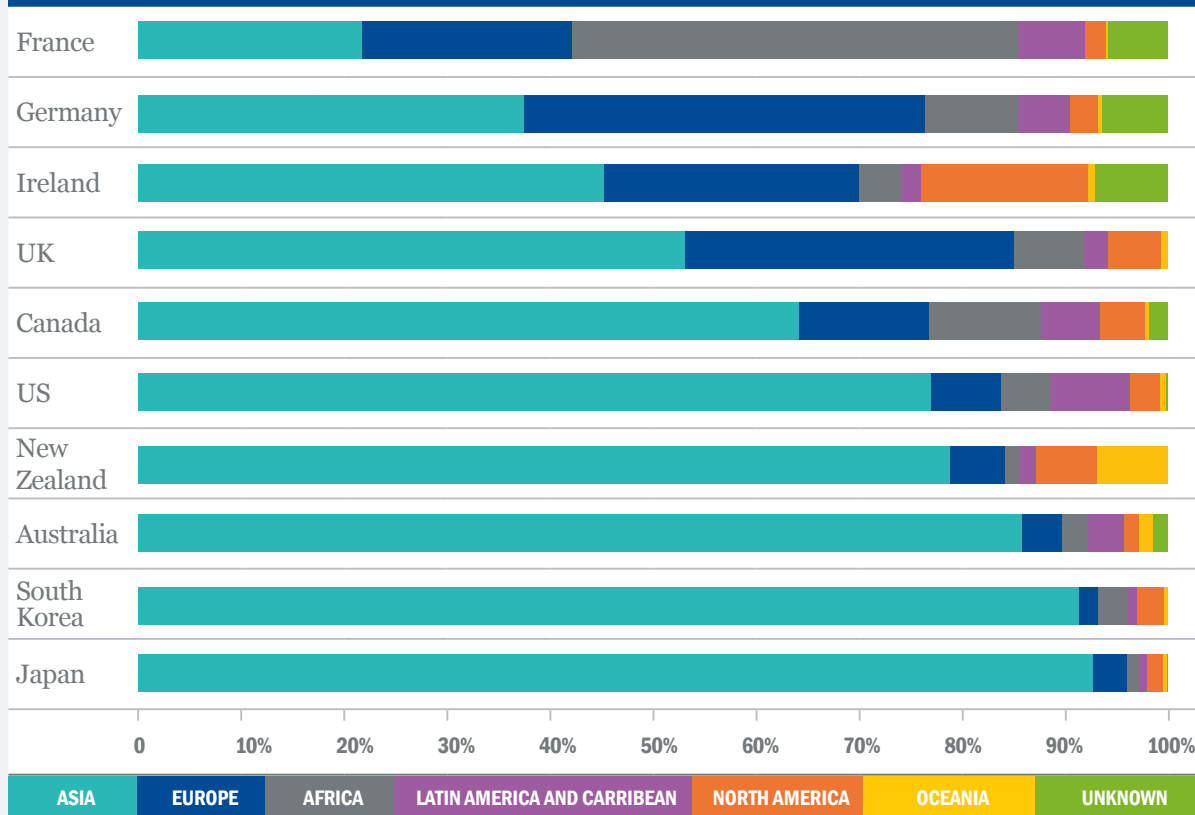
- Propensity towards global mobility
- Propensity towards regional mobility

Patterns of mobility have shown that students' choice of destination often depends on:

- Cultural and historical links
- Language
- Trade links

WHO GOES WHERE?

FIGURE 6: MAJOR HOST COUNTRIES BY STUDENTS' REGION OF ORIGIN



Source: OECD (2019), Education at a glance; Figure B6.5. Distribution of international and foreign students by region of origin (2017)

Sending regions

- OECD data shows that in 2017 **Asia** was the largest sending region and its students were regionally and globally mobile.
- **Europe** was the second largest sending region but students tended to stay in the region.
- African students were regionally and globally mobile. The preferred out-of-region destination being **France**.

Host countries

- **Japan, South Korea, Australia** and **New Zealand** attracted primarily regionally mobile students: Asian students made up 93%, 91%, 86% and 78% respectively.
- The **US, Canada** and the **UK** attracted mainly globally mobile students, with the majority from Asia. With a share of **32%** European students, the UK was also very attractive for regionally mobile students.
- **Germany, France** and **Ireland** were attractive both for regionally and globally mobile students.

SUMMARY

For many years, the top three destinations for international students have been:

1. United States
2. United Kingdom
3. Australia

Recently, global student mobility has begun to shift.

Generally, student mobility to **North America** and **Western Europe** has decreased.



Mobility to **Central** and **Eastern Europe** as well as **East Asia** and **the Pacific** has increased.



Australia and **Canada** have grown in popularity amongst English-speaking destinations, the **UK** has had very low growth rate (<1%) for the last couple of years and it has lost market share in 17 out of the world's top sending countries and territories.

Regional competitors have emerged, such as **Japan**, **Malaysia**, **Ghana**, **the Netherlands** and **Turkey**.

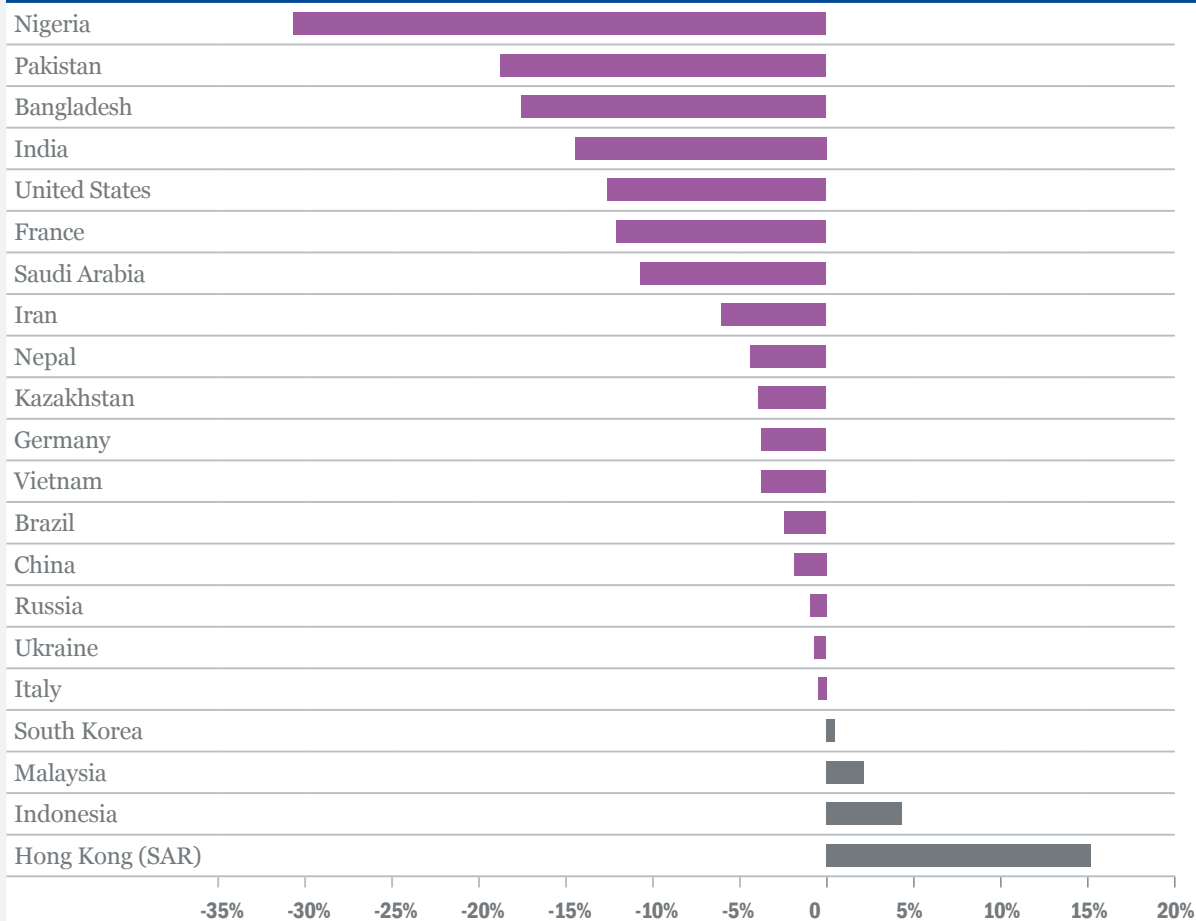
However, the UK has strong historical connections, trade links and cultural links which it could use to its advantage in attracting more students from around the world.

2

THE UK'S INTERNATIONAL STUDENT RECRUITMENT PERFORMANCE

HOW HAS THE UK'S MARKET SHARE IN THE WORLD'S TOP 21 SENDING COUNTRIES AND TERRITORIES CHANGED?

FIGURE 7: CHANGES IN THE UK MARKET SHARE IN THE WORLD'S LARGEST SENDING COUNTRIES AND TERRITORIES (2010 - 2017)



Source: Data extracted on 26 March 2020 from UIS.Stat

- The UK lost market share in **17** countries out of the world top 21.
- The most significant losses were in South Asia (**Pakistan**, **Bangladesh** and **India**) and **Nigeria**.
- The UK's market share gains concentrated in East and Southeast Asia: **Hong Kong (SAR)**, **Indonesia**, **Malaysia** and **South Korea**.
- In **Hong Kong (SAR)**, **Indonesia** and **Malaysia**, the UK's relative increase in market share meant a market share loss for **Australia**.
- In **South Korea**, the UK's relative increase in market share meant a loss in market share for the **US**.

IF NO LONGER TO THE UK, WHERE DID STUDENTS CHOOSE TO GO INSTEAD?

Direct competitors

In many cases, the UK's direct competitors – the US, Australia and Canada – have benefitted from the UK's loss in market share:



The US's market share increased by **27%** in Saudi Arabia, **10%** in Iran and **7%** in China.



Australia's market share increased by **11%** in Pakistan, **10%** in Nepal, **6%** in Brazil and **5%** in India.



Canada's market share increased by **7%** in India, **3.5%** in France, **3%** in Nigeria and **3%** in Brazil.

Newly emerging regional players

The UK also lost ground to a number of newly emerging regional players:



Malaysia's market share increased by **40%** in Bangladesh and **1%** in Nigeria.



Japan's market share increased by **20%** in both Nepal and Vietnam, by **12.5%** in South Korea and by **8.6%** in China.



Turkey's market share increased by **9%** market share in Iran and **1%** in Kazakhstan.

MAINTAIN, REGAIN OR DEVELOP?

TABLE 3: THE UK'S MARKET POSITION IN THE WORLD'S TOP 21 SENDING COUNTRIES AND TERRITORIES (2017) *EXACT RANKING UNCLEAR DUE TO LACK OF DATA FOR TOP COMPETITOR COUNTRIES IN 2010

WORLD'S TOP 21 COUNTRIES AND TERRITORIES	MARKET POSITION		MARKET SHARE DIFFERENCE	UK IS RANKED BEHIND ...
	2010	2017		
Hong Kong (SAR)	2	1	+15%	
Malaysia	2	1	+2%	
Italy	1	1	-1%	
United States	1	1	-13%	
Nigeria	1	1	-31%	
Saudi Arabia	2	2	-11%	US
France	1	2	-12%	CANADA
China	3	3	-2%	US, AUSTRALIA
Germany	1	3	-4%	AUSTRIA, NETHERLANDS
Pakistan	1	3	-19%	US
Russia	3	4	-1%	GERMANY, CZECH REPUBLIC, US
India	2	4	-15%	US, AUSTRALIA, CANADA
Bangladesh	1	4	-18%	MALAYSIA, US, AUSTRALIA
Indonesia	4	4	+4%	AUSTRALIA, US, MALAYSIA
South Korea	4	5	0%	US, JAPAN, AUSTRALIA, CANADA
Vietnam	5	6	-4%	JAPAN, US, AUSTRALIA, SOUTH KOREA, FRANCE
Kazakhstan	3	6	-4%	RUSSIA, KYRGYZSTAN, TURKEY, US, CZECH REPUBLIC
Nepal	3 or 4*	7	-4%	AUSTRALIA, JAPAN, US, INDIA, GERMANY, FINLAND
Brazil	5 or 6*	8	-2%	ARGENTINA, US, PORTUGAL, AUSTRALIA, FRANCE, CANADA, GERMANY
Iran	2	11	-6%	US, TURKEY, GERMANY, ITALY, CANADA, AUSTRALIA, AUSTRIA, INDIA, FRANCE, HUNGARY
Ukraine	10	12	-1%	POLAND, RUSSIA, GERMANY, CZECH REPUBLIC, ITALY, US, AUSTRIA, FRANCE, SLOVAKIA, HUNGARY, CANADA

Source: UIS.Stat, April 2020

- Although, the UK lost a substantial market share in a number of countries, its market position was not necessarily affected. But improvement is needed to remain competitive in an increasingly crowded market.
- To improve its recruitment performance, three categories of markets can be identified:
 - where the UK should **MAINTAIN** its market position
 - where the UK should **REGAIN** its market position
 - where the UK should **DEVELOP** a stronger market position

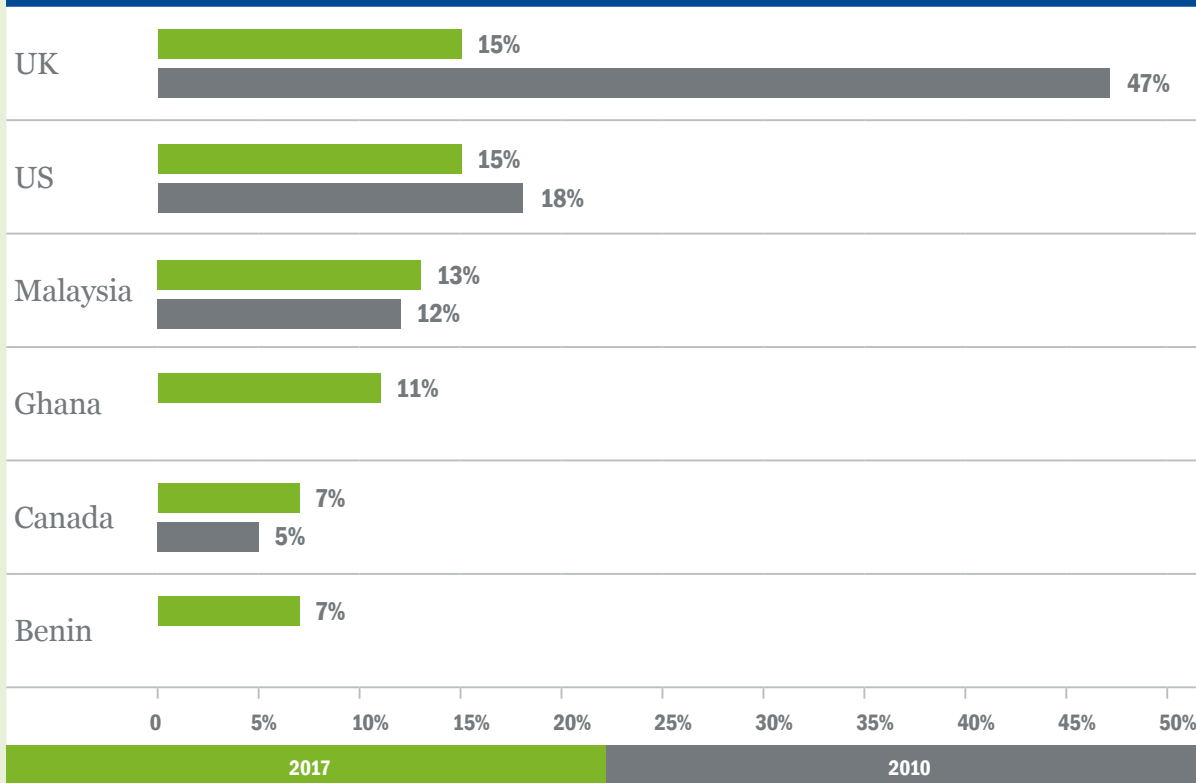
A. COUNTRIES AND TERRITORIES WHERE THE UK SHOULD **MAINTAIN** ITS MARKET POSITION

- The UK has a strong market position (**Top 3**) in **Hong Kong (SAR)**, **Malaysia**, **Italy**, **US**, **Nigeria**, **Saudi Arabia**, **France** and **China**.
- It maintains a comfortable lead over competitors in **Hong Kong (SAR)**, **Malaysia**, **Italy**, **US** and **China**:
 - In **Hong Kong (SAR)** and **Malaysia**, the UK has gained market share since 2010.
 - In **Italy** and the **US**, competitors lag behind.
 - The UK's position in **China** could be threatened by **Japan** in the future, although the UK's share remains very large and Chinese students represent one third of all international students in the UK.
- However, the UK's market position in **Nigeria**, **Saudi Arabia** and **France** could be easily lost as its market share is not much larger than its competitors' share.
 - Concerted efforts by the sector and support from government are essential to maintain the current position in those markets.

NIGERIA – THE CASE FOR WHY ACTION TO MAINTAIN POSITION IS IMPORTANT



FIGURE 8: MARKET SHARE CHANGES IN NIGERIA 2010 vs. 2017



Source: Data extracted on 18 Feb 2019 12:00 UTC (GMT) from UIS.Stat

- The number of Nigerian students in the UK peaked in 2014 at almost **18,000**. By 2017, there were only **12,600** students.
- The UK is no longer the single most popular destination for Nigerian students. In 2017, the UK's market share roughly equalled that of the US.
- **Canada** and **Malaysia** have grown in popularity, while **Ghana** and **Benin** have emerged as new study destinations.
- The loss in market share may relate to the oil price collapse in 2014–16, and the high value of the pound against dollar in this period, driving up the relative cost in fees.

B. COUNTRIES WHERE THE UK SHOULD REGAIN MARKET POSITION

- In 2010, the UK ranked first in **Germany**, **Pakistan** and **Bangladesh** but has now dropped to third or fourth position. In **India** and **Russia**, it dropped from second and third to fourth position.
- The UK lost ground to direct competitors, such as the **US**, **Australia** and **Canada** but also to strong competition within regions such as Asia (**Malaysia**) and Europe (**Germany**, **Netherlands**).
- While we know that in a number of countries (**India**, **Pakistan**, **Bangladesh**), the abolition of the post-study work visa in 2012 was a decisive reason to choose a different English-speaking country, a closer look at competitors' strategies, such as **Australia's**, to attract more international students is required.

PAKISTAN – THE NEED TO REGAIN MARKET SHARE

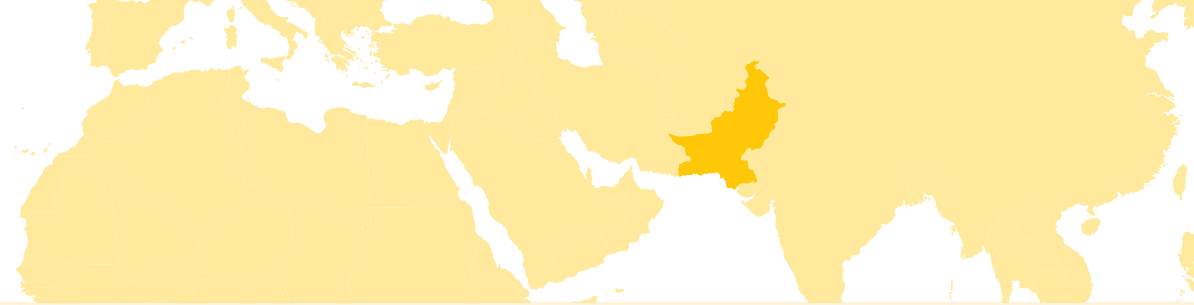
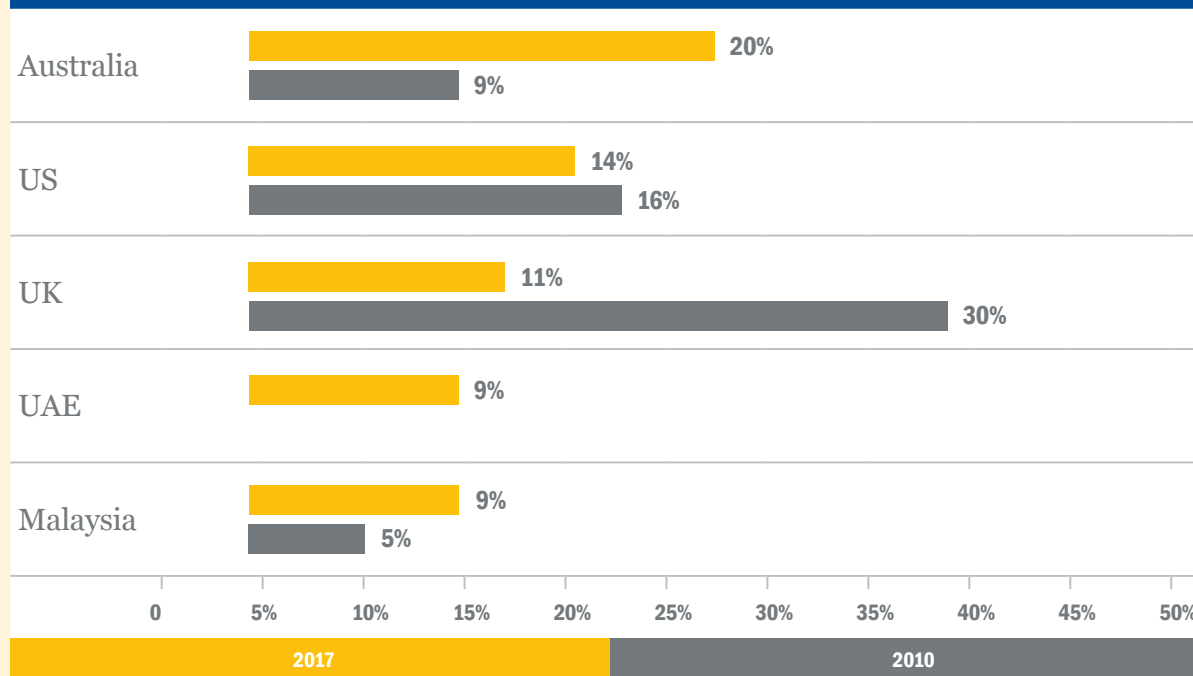


FIGURE 9: MARKET SHARE CHANGES IN PAKISTAN



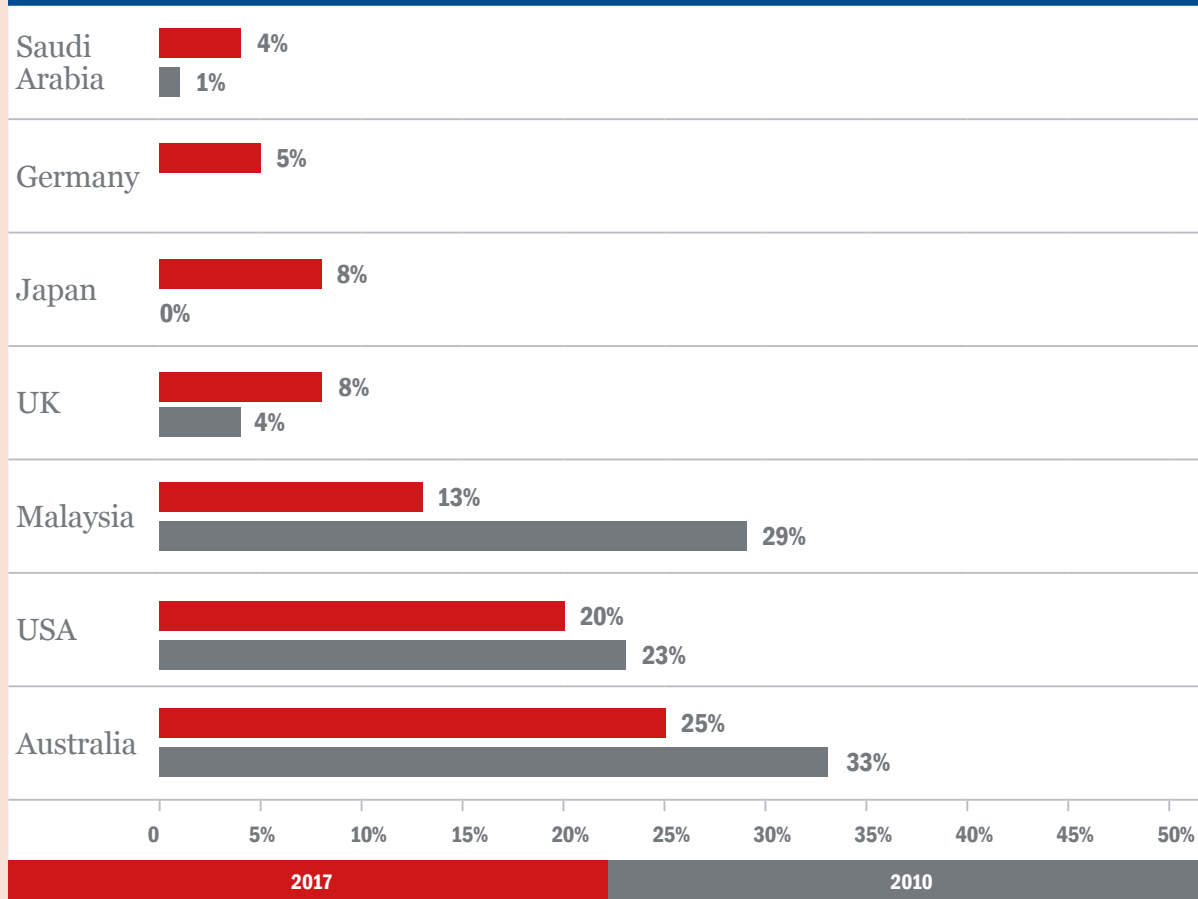
- The number of students from **Pakistan** in the UK peaked in 2011 at **10,100**, dropping to **5,200** in 2017.
- Compared to 2010, the UK's market share dropped from **30%** to **11%**, falling from first market position to third.
- Most of the gains can be attributed to **Australia, the UAE and Malaysia** – with the latter two having become hubs for (UK) TNE in the last decade .
- **Pakistan** is a price-sensitive market which makes the opportunity for material return on investment important. The drop in market share can therefore primarily be attributed to the abolition of the post-study work visa. The reintroduction of this opportunity is expected to increase the UK's market share in the future.

C. COUNTRIES WHERE THE UK SHOULD DEVELOP A STRONGER MARKET POSITION

- The UK has a relatively weak market position in countries such as **Kazakhstan**, **Ukraine** and **Iran**, where there are fewer cultural connections or weaker trade and diplomatic links.
 - One way to engage with **Kazakhstan** and **Iran** could be to develop strong TNE engagement with **Turkey**, which has become a top study destination in the region.
 - **Poland's** appeal is growing with students from Eastern Europe (**Ukraine**, **Belarus**) and it is likely to attract price-sensitive students from the region. This is particularly important in the context of the post-Covid-19 recession and Brexit. The country has a favourable TNE environment and attractive student visa policies.
- In other countries where the UK ranks poorly, English-speaking competitors such as the **US** and **Australia** perform well in absolute terms but have recently lost market share.
- This demonstrates an appetite for English-speaking study destinations and opportunities for the UK to develop a stronger position – if we can understand why these other destinations have lost market share and how the UK could become the alternative of choice, for example in **Indonesia**, **South Korea**, **Vietnam**, **Nepal** and **Brazil**.

INDONESIA – DEVELOPING THE GREEN SHOOTS OF GROWTH

FIGURE 10: MARKET SHARE CHANGES IN INDONESIA



Source: Data extracted on 18 Feb 2019 12:00 UTC (GMT) from UIS.Stat

- In 2017, there were **3,620** Indonesian students in the UK, up from **1,137** students in 2010.
- The UK gained **4%** in market share, while its direct competitors (**US** and **Australia**) and its regional competitor **Malaysia** lost market share.
- This indicates opportunity for the UK to develop an even stronger position in **Indonesia**.
- The increase in market share is likely linked to the Indonesian Endowment Fund for Education (LPDP) scholarship. The UK remains the most popular overseas study destination for LPDP awardees.

SUMMARY

- Although the UK has lost substantial market share in 17 of the world's top 21 sending countries and territories, its market position has not been affected everywhere.
- It is, however, important for the UK to start focusing its efforts – jointly as a sector and with government – on key markets to make sure its performance will not suffer in the future.
- To maintain and improve its international recruitment, different strategies should be developed to target three different categories of markets:
 - where the UK should **MAINTAIN** its market position
 - where the UK should **REGAIN** its market position
 - where the UK should **DEVELOP** a stronger market position
- Each market within the categories requires a more in-depth analysis to better understand:
 - competitors strategies to increase market share in top sending countries
 - the importance of pathways from TNE to onshore recruitment
 - what has been effective in boosting recruitment in emerging markets.

3

IMPLICATIONS OF THE COVID-19 PANDEMIC

OVERVIEW

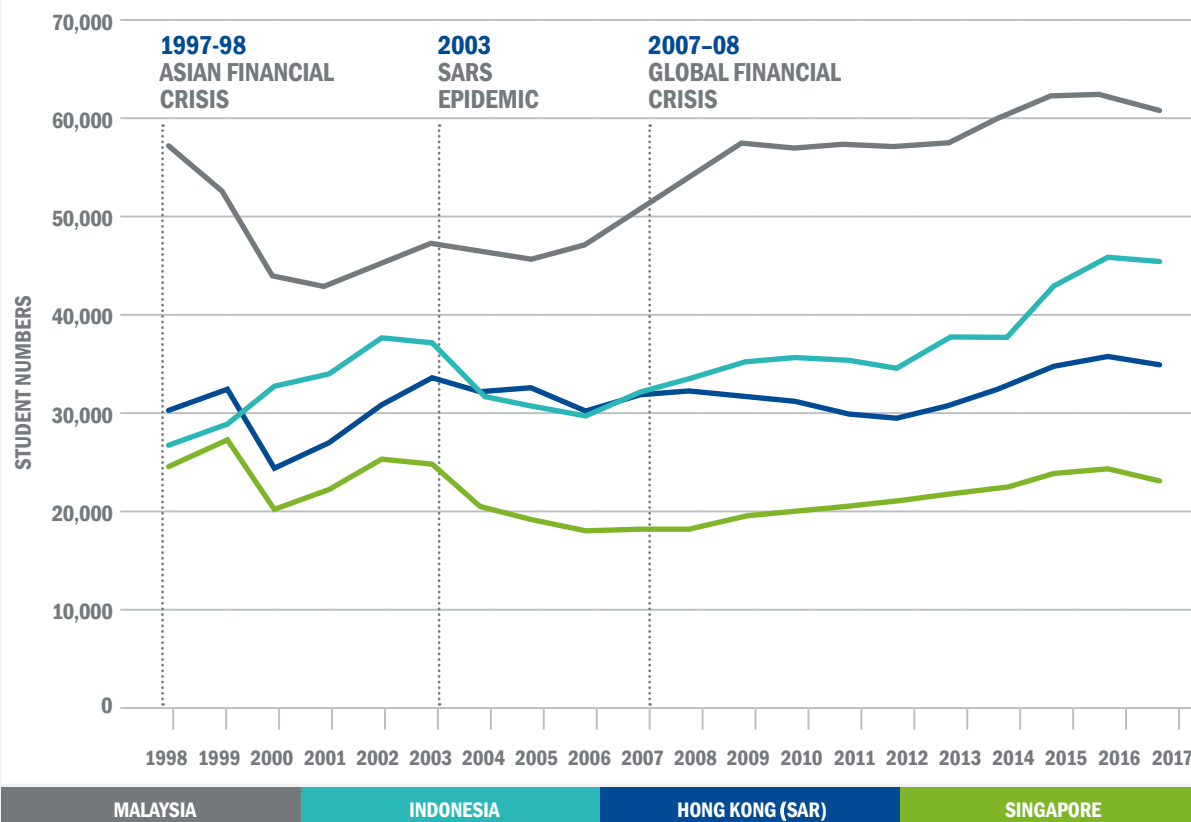
The previous slides analysed the last decade.

- The Covid-19 pandemic will likely affect future international student recruitment, so it is worth looking back to previous crises for lessons on the current one.
- Although their impact was limited, the 1997 Asian financial crisis and East Asia's experiences with Sars in 2003 may indicate the impact of such events on student mobility.

This section draws on these historical events to see how international student recruitment might be affected by Covid-19.

HOW DID THE ASIAN FINANCIAL CRISIS AND SARS IMPACT OUTBOUND STUDENT MOBILITY?

FIGURE 11: GLOBAL STUDENT MOBILITY, 1998 – 2017

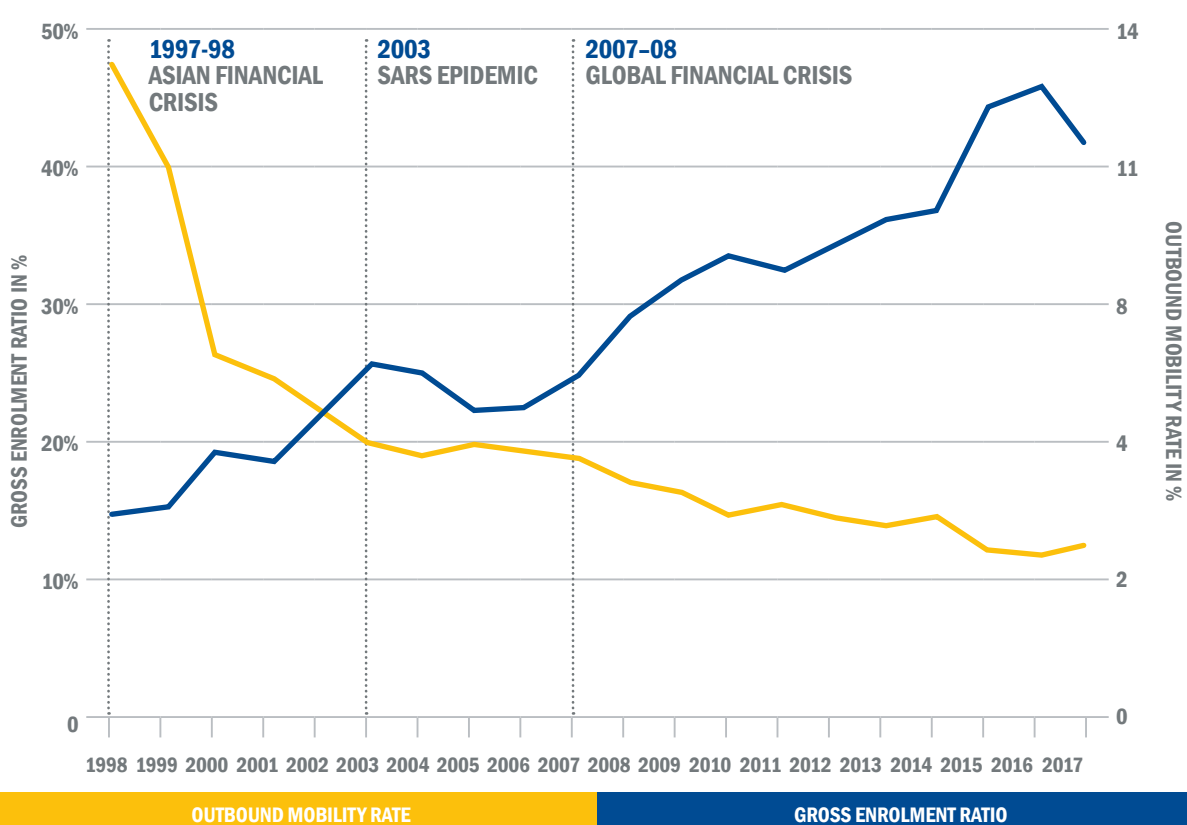


Data source: Data extracted on 17 April 2020 from UIS.Stat

- The Asian financial crisis appears to have had a lagged effect and mostly hit outbound student mobility from **Malaysia, Hong Kong (SAR)** and **Singapore**.
- In **Hong Kong (SAR)** and **Singapore**, outbound student numbers dropped by **25%** between 1999 and 2000, then began to recover. Outbound student numbers from **Malaysia** dropped straight away in 1998 and only increased again in 2002 (**-25% over four years**).
- Sars appears to have had an immediate effect on outbound student numbers. Numbers dropped by **17%** in **Singapore**, **15%** in **Indonesia**, **3%** in **Hong Kong (SAR)** and **2%** in **Malaysia** from 2003 to 2004. While **Hong Kong (SAR)** and **Malaysia's** numbers rebounded in 2005 and 2006 respectively, Singapore was more severely affected by the epidemic and numbers only rose again in 2009.
- The global financial crisis might have contributed to decelerated growth (minimal impact on Singapore), which rebounded after five years. However, scholarship spending was reduced.

CASE STUDY: HOW DID THE **CRISES** AFFECT MALAYSIA'S HIGHER EDUCATION STRATEGY?

FIGURE 12: GROSS ENROLMENT RATIO AND OUTBOUND MOBILITY RATE IN MALAYSIA, 1998 – 2017



Data source: Data extracted on 17 April 2020 from UIS.Stat

- In 1995, Malaysian students abroad were estimated to cost the country **US\$800 million** in currency outflows or **12%** of Malaysia's current account deficit.*
- The government sought to improve domestic higher education through private provision to reduce currency outflows.
- Shortly after the East Asia currency crisis in 1997–98, **Malaysia** encouraged TNE and opened its higher education system to allow branch campuses (Monash University, 1998; University of Nottingham, 2000).
- With over **130,000** inbound students, **Malaysia** is now a net exporter of higher education. It was the 11th largest host country for international students in 2017.

* McBurnie, G. and C. Ziguras (2007), Transnational Education: Issues and trends in offshore higher education. Routledge, UK.

HOW WILL THE COVID-19 PANDEMIC AFFECT INTERNATIONAL HIGHER EDUCATION?

- The Covid-19 pandemic and enforced measures to ‘flatten the curve’ will have an immediate **impact on student mobility**. A global recession following the pandemic, depending on its severity, is likely to have **a lagged impact over possibly five years or more**.
- As a recession likely reduces middle-class families’ purchasing power, international demand for higher education will decrease, while domestic demand will increase. This will push international demand towards more cost-effective options nearer to home, meaning **regional student mobility is likely to grow. TNE can facilitate this trend**.
- A recession will also impact public spending on education: governments are expected to prioritise developing domestic higher education provision, rather than providing scholarships and grants for studying abroad, and might raise tuition fees for international and home students. The regulatory environment is expected to facilitate TNE partnerships.
- The current necessary switch to online teaching is likely to **boost online, distance (ODL) and blended learning in the long-term**. It is likely ODL will become more familiar to students, institutions and regulatory bodies across the world, especially in countries that have previously been sceptical of it. Not only might ODL provision be enhanced so as to be more prepared in the future, it might also become embedded as part of standard education provision.
- As a result, the Covid-19 pandemic and post-Covid-19 recession might accelerate trends that would otherwise have taken decades to unfold, such as intra-regional mobility, the expansion of TNE and the recognition of online, distance and blended learning.

4

RECOMMENDATIONS FOR PRACTITIONERS AND POLICY MAKERS

RECOMMENDATIONS FOR THE UK GOVERNMENT

Short-term recommendations:

Pay careful attention to market sentiments in response to the Covid-19 pandemic and support the UK higher education sector through a package of measures (**Kickstarting the recovery**) that alleviate a future Covid-19-induced decline in international student recruitment. This includes stabilizing EU recruitment through scholarships and increased marketing, working to remove immediate barriers to international student mobility for 2020/21, seeking to reassure applicants that the UK is a safe and welcoming destination and maximizing the UK's competitiveness.

Mid to long-term recommendations:

Support the UK higher education sector to maintain, regain and develop the UK's market position in the world's top 21 sending countries.

- **MAINTAIN:** Invest in promoting the UK as a study destination, promote the Graduate Route and work with governments to remove any barriers to students continuing to choose the UK.

- **REGAIN:** Promote the Graduate Route, seek to understand the factors which have driven students elsewhere and invest more in promotion to counteract these factors. Consider targeted financial initiatives such as scholarships or access to finance.
- **DEVELOP:** Establish country specific strategies to raise the profile of UK higher education, including better promotion, new financial initiatives and developing TNE pathways. The following steps can support this effort:
 - A system-to-system approach to improve prospects for UK TNE, including recognition of degrees, coupled with seed funding for innovative TNE ventures and increased investment in promoting onshore and offshore UK HE.
 - Targeted financial measures such as scholarships, international student loans and support to enhance English language skills.

RECOMMENDATIONS FOR UK HIGHER EDUCATION INSTITUTIONS

Short-term recommendations:

In light of how past crises have affected international student recruitment, institutions should consider:

- increasing the flexibility of their overall education provision, onshore and offshore, to raise UK HEIs' competitiveness with reliable regional partners in the short and mid-term
- using TNE infrastructure, such as ODL, overseas partners' networks and international branch campuses (IBCs) to support students' learning in their home country
- cementing existing partnerships with local institutions and agents
- rethinking recruitment strategies and making use of alumni networks, as stories about health and safety and crisis management will count in the future.

Mid to long-term recommendations:

- **MAINTAIN:** pay careful attention to market sentiments in response to the Covid-19 pandemic, seek to reassure international applicants that the UK is a safe and welcoming destination, highlight institutional USPs.
- **REGAIN:** examine your institutional performance in these markets and compare competitors' marketing and recruitment strategies, e.g., emphasize international student experience, offerings for developing academic English, international student support, deploy alumni networks.
- **DEVELOP:** consider your institutional profile and assess how it might meet needs in the specific country; consider the development of TNE pathways and building internal capacity for TNE.

NEXT STEPS

1

UUKi will undertake a more in-depth analysis of some of the world's top 21 sending countries to develop a strategy to improve the UK's international recruitment performance.

2

UUKi will investigate the strategies of competitor countries, such as Australia and Canada that have been gaining market share and compare this with the UK's approach.

3

From this, UUKi will articulate more tailored recommendations for collaboration between sector and government.

5

ANNEX A: UK MARKET SHARE IN 2010 AND 2017 AND CHANGES IN ITS MARKET POSITION

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TABLE 4: UK MARKET SHARE, MARKET SHARE DIFFERENCE AND MARKET POSITION IN 2010 AND 2017 FOR THE WORLD'S TOP 21 SENDING COUNTRIES AND TERRITORIES (BY MARKET SHARE DIFFERENCE) *EXACT RANKING UNCLEAR DUE TO LACK OF DATA FOR TOP COMPETITOR COUNTRIES IN 2010

WORLD'S TOP 21 COUNTRIES	MARKET SHARE		MARKET SHARE DIFFERENCE	MARKET POSITION		LOST GROUND TO...
	2010	2017		2010	2017	
Hong Kong (SAR)	30%	46%	+15%	2	1	
Indonesia	4%	8%	+4%	4	4	
Malaysia	26%	28%	2%	2	1	
South Korea	5%	5%	0	4	5	CANADA
Italy	19%	18%	-1%	1	1	
Ukraine	2%	1%	-1%	10	12	CANADA, SLOVAKIA
Russia	8%	7%	-1%	3	4	CZECH REPUBLIC
China	12%	11%	-2%	3	3	
Brazil	5%	3%	-2%	5 or 6*	8	AUSTRALIA, CANADA
Vietnam	8%	4%	-4%	5	6	SOUTH KOREA
Germany	15%	11%	-4%	1	3	AUSTRIA, NETHERLANDS
Kazakhstan	6%	2%	-4%	3	6	TURKEY, US, CZECH R
Nepal	5%	1%	-4%	3 or 4*	7	GERMANY, FINLAND
Iran	9%	3%	-6%	2	11	TURKEY, ITALY, GERMANY, INDIA, CANADA, AUSTRALIA, AUSTRIA, FRANCE, HUNGARY
Saudi Arabia	21%	10%	-11%	2	2	
France	27%	15%	-12%	1	2	CANADA
United States	33%	20%	-13%	1	1	
India	20%	5%	-15%	2	4	AUSTRALIA, CANADA
Bangladesh	22%	4%	-19%	1	4	MALAYSIA, US, AUSTRALIA
Pakistan	30%	11%	-19%	1	3	US, AUSTRALIA
Nigeria	47%	15%	-31%	1	1	US, MALAYSIA, GHANA, CANADA

Source: UIS.Stat, April 2020

UNIVERSITIES UK INTERNATIONAL

UUKi is the international arm of Universities UK. We help UK universities flourish internationally by representing them and acting in their collective interest. We actively promote universities abroad, provide trusted information for and about them, and create new opportunities for the sector. We aim to: enable universities to develop and deliver strong international strategies; influence the policy and regulatory environment through our ability to represent UK universities; and create diverse opportunities through strategic partnerships.

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EDUCATION INSIGHT

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