



Universities UK
International

QUARTERLY INTERNATIONAL DATA RELEASE

IN PARTNERSHIP WITH

hotcourses group
an  idp company

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DEAR COLLEAGUES



We're delighted to share the first of our quarterly briefings presenting data on potential international student interest and subsequent recruitment to the UK and some of our 'competitors'.

This paper uses data from sources including Hotcourses Group, HESA, UCAS and the Home Office, to form a picture of international demand for UK higher education as well as demand for the likes of the US, Australia and Canada.

We offer a comparison with our international competitors in terms of students enrolling with and studying at our universities, and then use the latest data on Visa applications, and UCAS data for the EU, to indicate definite interest shown in coming to study in the UK.

The final section focuses on new data from Hotcourses Group's course search tool and offers valuable insights into areas of interest for students across the world when they are researching their study options.

This gives us a fascinating indication of possible future trends in international student recruitment.

The document focuses on a few key markets including India and the EU.

The analysis highlights the impact of geo-political circumstances on international student demand.

I'd like to take this opportunity to thank Hotcourses Group for sharing data and making this report possible.

A handwritten signature in blue ink, appearing to read 'Vivienne Stern'.

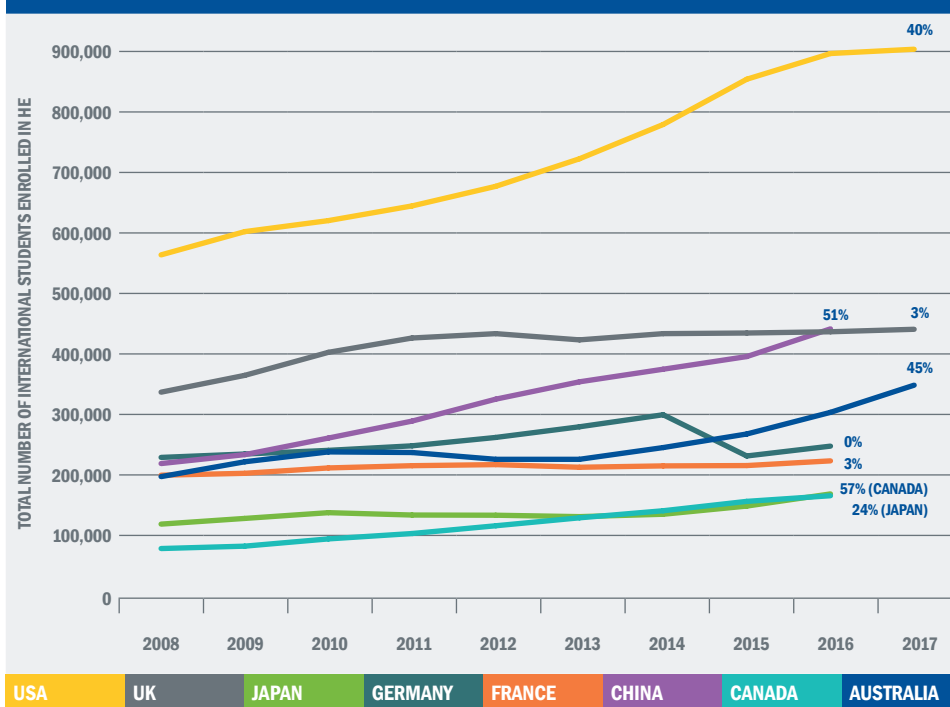
VIVIENNE STERN

Director,
Universities UK International

INTERNATIONAL COMPETITORS

INTERNATIONAL STUDENT NUMBERS

INTERNATIONAL STUDENTS ENROLLED IN HIGHER EDUCATION IN THE UK AND COMPETITOR COUNTRIES WITH INCREASES SINCE 2011



The trends of Australia, Canada, China, France, Germany, Japan, UK and USA for YEAR year. Colour shows details about Australia, Canada, China, France, Germany, Japan, UK and USA. The view is filtered on YEAR year, which excludes Null

The percentage growth in enrolled international students since 2011 in the UK, France and Germany lags far behind their non European rivals.

The latest enrolment data suggests that China has now overtaken the UK as the second largest host of enrolled international students.

The USA has seen strong growth since 2011 but is beginning to plateau as the current administration proposes restrictions to the immigration system.

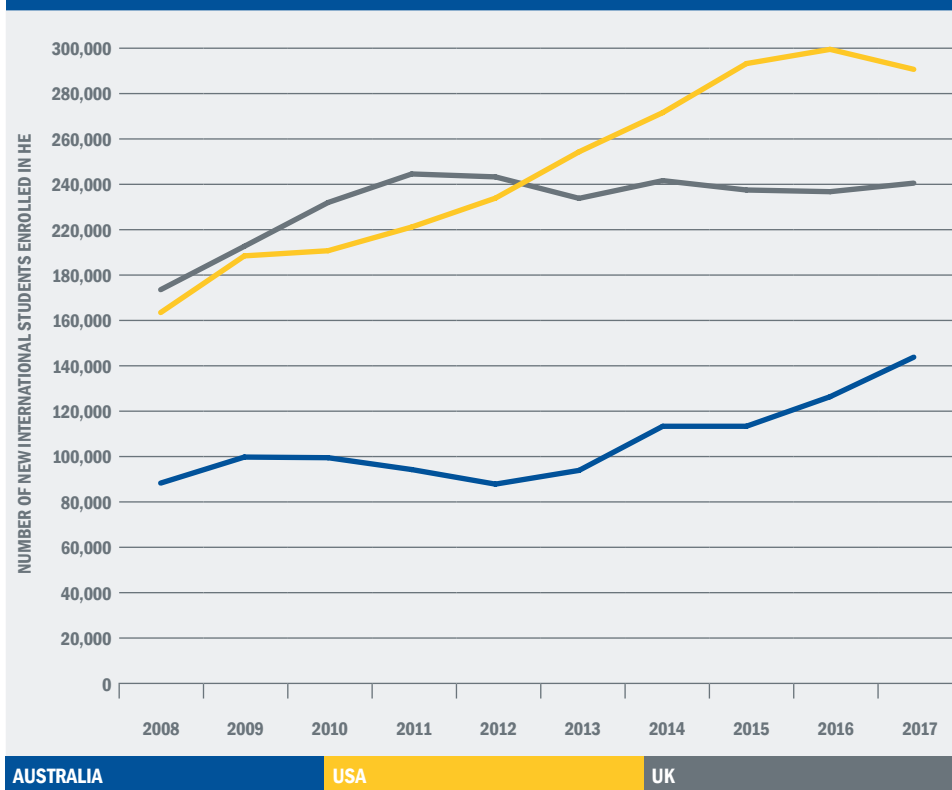
Since experiencing a difficult period from 2011 to 2013, Australia has gone from strength to strength, with their rate of growth increasing year on year.

Canada and Japan have seen steady growth from a low initial baseline.

NEW INTERNATIONAL STUDENT ENROLMENTS



NEW INTERNATIONAL STUDENT ENROLMENTS AT KEY COMPETITORS



The trends of Australia, UK and USA for YEAR year. Colour shows details about Australia, UK and USA. The view is filtered on sum of Australia, sum of UK and sum of USA. The sum of Australia filter keeps all values. the sum of UK filter keeps all values. The sum of USA filter keeps non-Null values only.

This chart shows the number of all new enrolments (students in the first year of their degree) of international students in the UK, USA and Australia. New enrolment figures provide more immediate feedback on the relative attractiveness of study destinations each year.

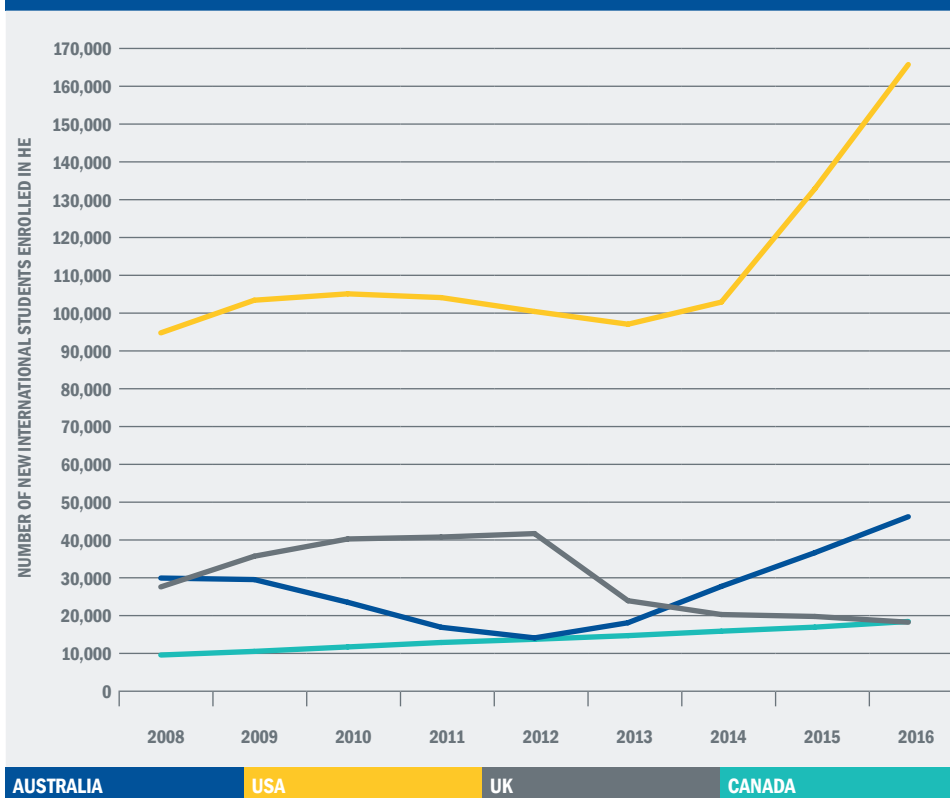
The number of new enrolments at UK universities peaked in 2011 and has stagnated since then.

This stagnation meant the USA overtook the UK in numbers of new enrolments after 2012 and quickly established a clear lead. A drop off in the last year is enough to be noticeable however.

Australia is still a fair way behind the UK in numerical terms but the gap has been narrowing every year since 2012.

INDIAN STUDENT NUMBERS

STUDENTS FROM INDIA ENROLLED IN HIGHER EDUCATION IN THE UK AND COMPETITOR COUNTRIES



The trends of Australia, Canada, UK and USA for YEAR year. Colour shows details about Australia, Canada, UK and USA. The data is filtered on sum of Number of Records, which keeps all values. The view is filtered on sum of Australia, sum of Canada, sum of UK and sum of USA. The sum of Australia filter keeps non-Null values only. The sum of Canada filter keeps non-Null values only. The sum of UK filter keeps non-Null values only. The sum of USA filter keeps non-Null values only

The USA is racing ahead in the total number of Indian students enrolled in higher education, with a spike in growth from 2015 that has slowed slightly by 2017.

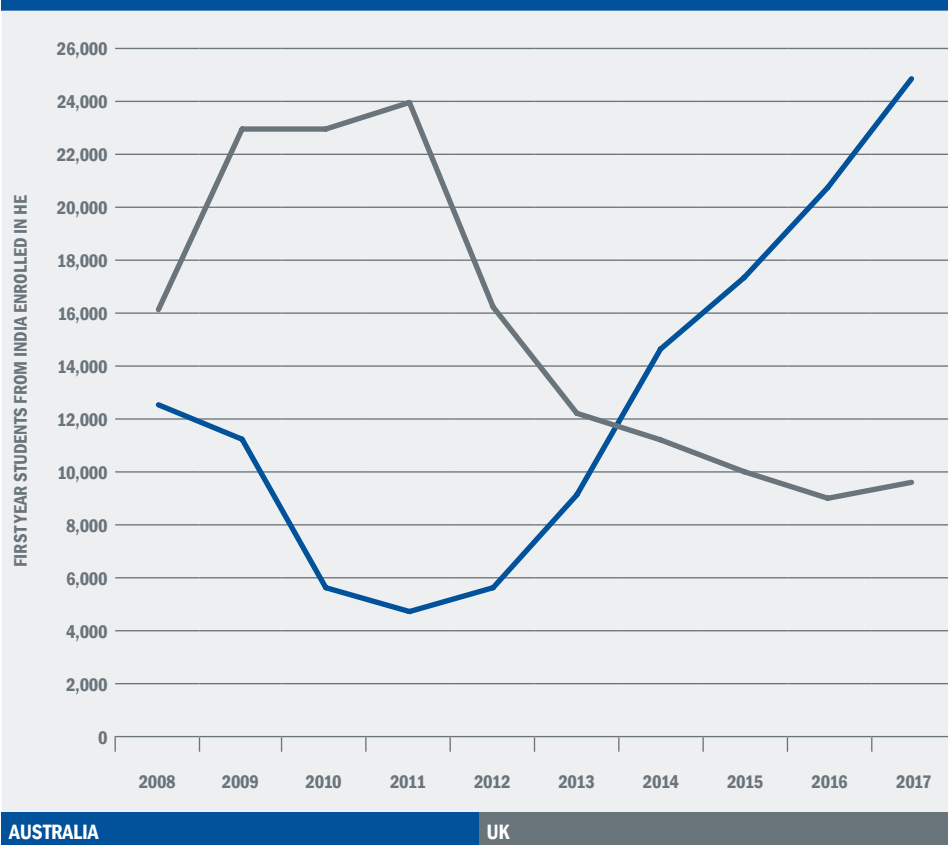
The UK's decline appears to be slowing, with only a minimal percentage decrease happening in 2017. Recent visa statistics are also showing encouraging signs, with increasing numbers of Indian students being sponsored by HEIs for Tier 4 visas.

After a period of decline up to 2012, Australia has seen a rapid increase in Indian student numbers following the introduction of changes to the student immigration regime.

Canada has experienced slow but consistent growth of around 10% every year, seeing them almost level with the UK by 2016.

INDIAN STUDENT NUMBERS UK AND AUSTRALIA

NEW STUDENT ENROLMENTS FROM INDIA IN HIGHER EDUCATION IN THE UK AND COMPETITOR COUNTRIES



The trends for Australia and UK for Year year. Colour shows details about Australia and the UK.
The view is filtered on YEAR year, which keeps 10 of 10 members.

This chart shows the stark reversal in fortunes between the UK and Australia when it comes to new student enrolments from India. As the number of students coming from India to Australia has increased, the number coming to the UK has decreased.

In 2013 the Australian government introduced a more generous post study work system, and in 2016 launched a national strategy to promote the country's international education exports.

Meanwhile, since 2011 the UK government has:

- removed the post-study work visa
- introduced stricter language, credibility and academic progression checks for student visas
- introduced the NHS surcharge and landlord checks on tenants' immigration status

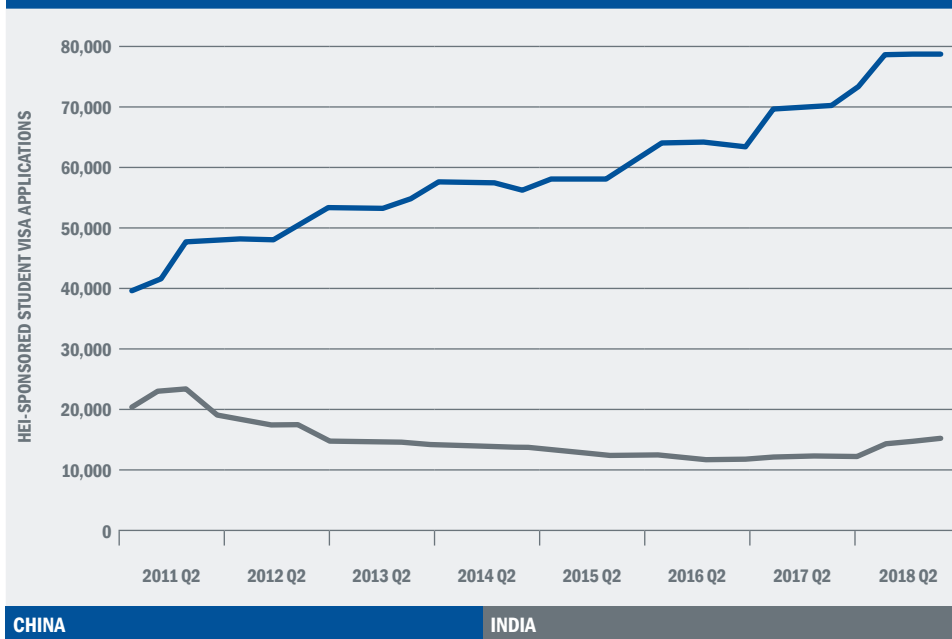


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VISA APPLICATIONS

TIER 4 VISA APPLICATIONS CHINA AND INDIA

HEI-SPONSORED TIER 4 VISA APPLICATIONS FROM CHINA AND INDIA, 2011-2017



The two biggest contributors of Tier 4 visa applications are shown in this chart.

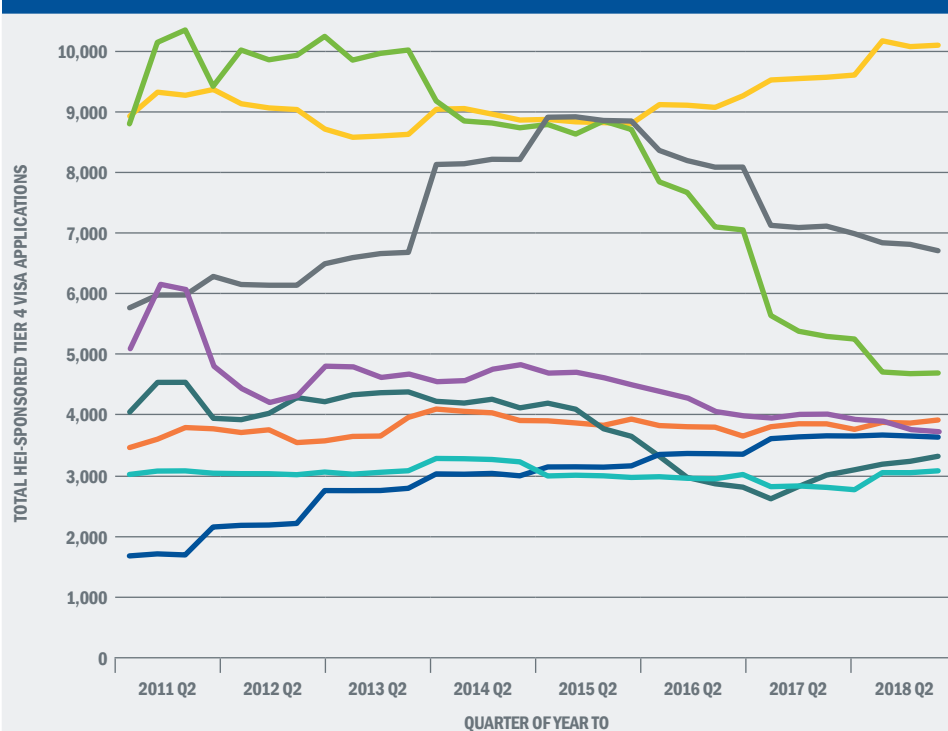
The increase in applications from China has been impressive. There were almost double as many applicants in 2018 as there were in 2011.

Despite a long downward trend from 2011 to 2015, the numbers of Tier 4 visa applicants from India have been increasing slightly in recent years, with a 28% rise in the year to March 2018. The progress of this trend will be closely monitored in the September 2018 figures as will the impact on HESA new enrolments.

Numbers from China are likely to grow as it was added to the 'low risk' category by the Home Office on 15 June 2018, streamlining the visa application process for Chinese applicants. However, the fact that India was not included on this list may lead to a decrease in applications.

TIER 4 VISA APPLICATIONS BY COUNTRY OF ORIGIN

QUARTERLY HEI-SPONSORED TIER 4 VISA APPLICATIONS BY COUNTRY OF ORIGIN



CANADA HONG KONG MALAYSIA NIGERIA PAKISTAN SAUDI ARABIA THAILAND USA

The trends of Canada, Hong Kong, Malaysia, Nigeria, Pakistan, Saudi Arabia, Thailand and USA for Year to Quarter. Colour shows details about Canada, Hong Kong, Malaysia, Nigeria, Pakistan, Saudi Arabia, Thailand and USA. The view is filtered on Year to Quarter, which keeps non-Null values only.

The upwards trends in Tier 4 visa applicants from the USA and Hong Kong are the most encouraging.

A steep downward trend from Nigeria is notable, as is the faltering momentum from Malaysia after a period of growth up to 2014. Applicants from Saudi Arabia have been decreasing since a brief upswing in 2014.

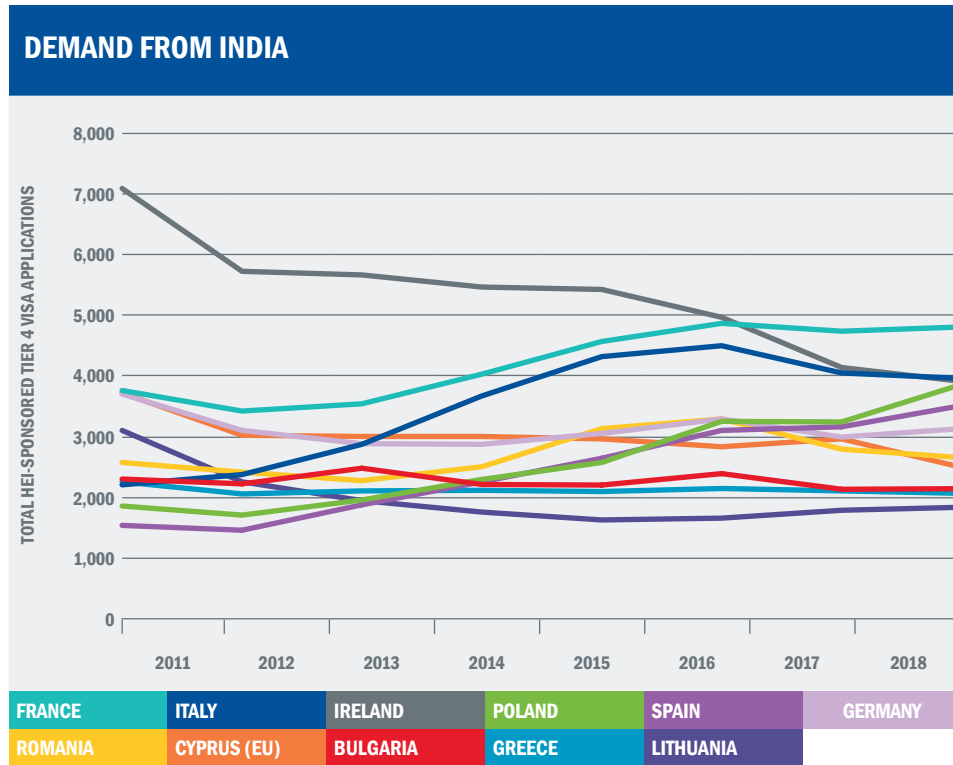
A downward trend from Pakistan was reversed in 2016 with increases in the number of applicants since that point.



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UCAS EU APPLICANTS DATA

TOP 10 EU COUNTRIES BY UCAS APPLICANT NUMBERS



A busy chart is dominated by the obvious downward trend of applicants from Ireland since 2011.

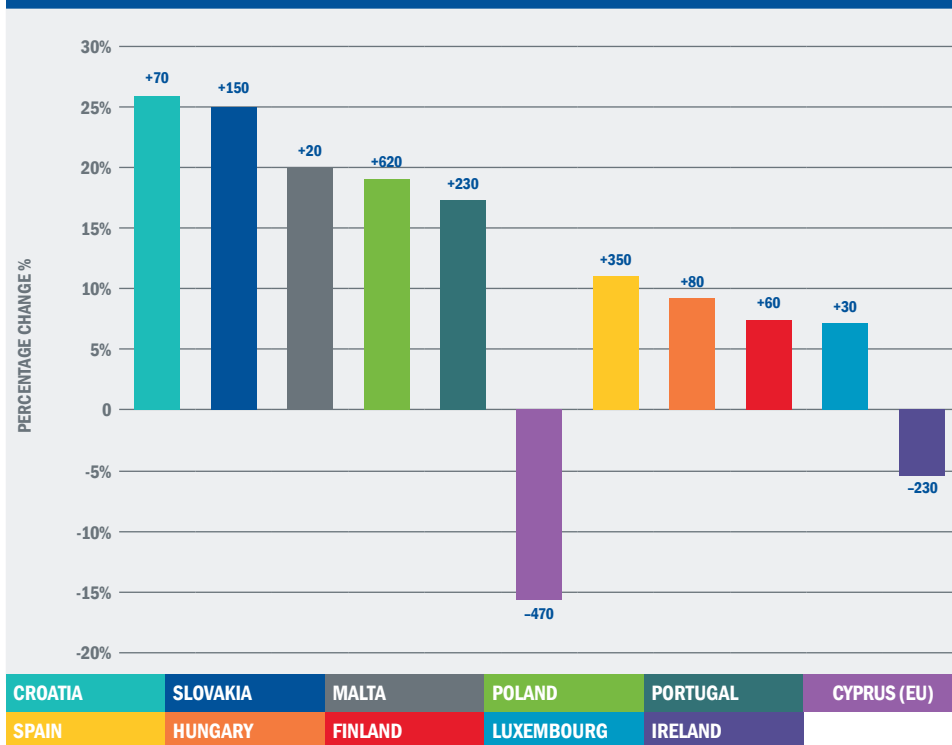
Over three thousand fewer UCAS applicants came from Ireland in 2018 than they did in 2011.

France and Italy lead the way in growth, slowed by a slight stagnation between 2016-18. Other very positive trends come from Poland and Spain, with a slight uptick from Germany in the year 2018 being a positive sign.

A lack of certainty surrounding the fee status of EU students from 2020 onwards may lead to decreases across the board.

EU COUNTRIES WITH LARGEST CHANGE IN UCAS APPLICANTS

EU COUNTRIES WITH THE LARGEST PERCENTAGE CHANGE IN UCAS APPLICANTS – MARCH DEADLINE 2017-18



The past year has seen at least some growth in applicants from just over half of the EU 27.

The fastest growing markets are numerically relatively small: Croatia, Slovakia, and Malta.

Croatia especially continues its long term upward trend in the number of applicants.

Big decreases from Cyprus are concerning as the country contributes more applicants relative to its size than any other nation in the EU.

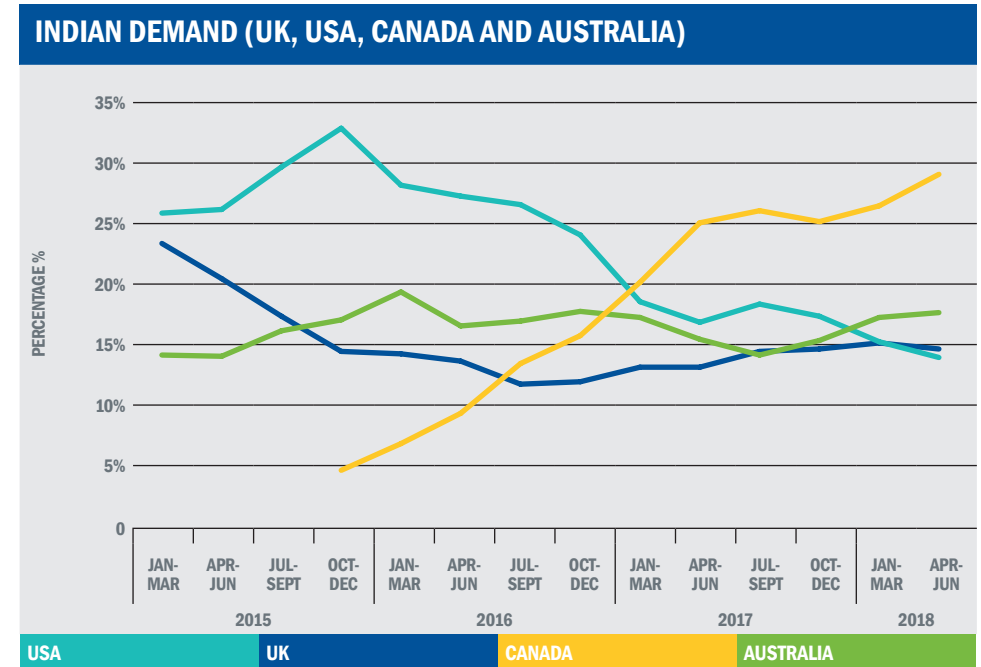
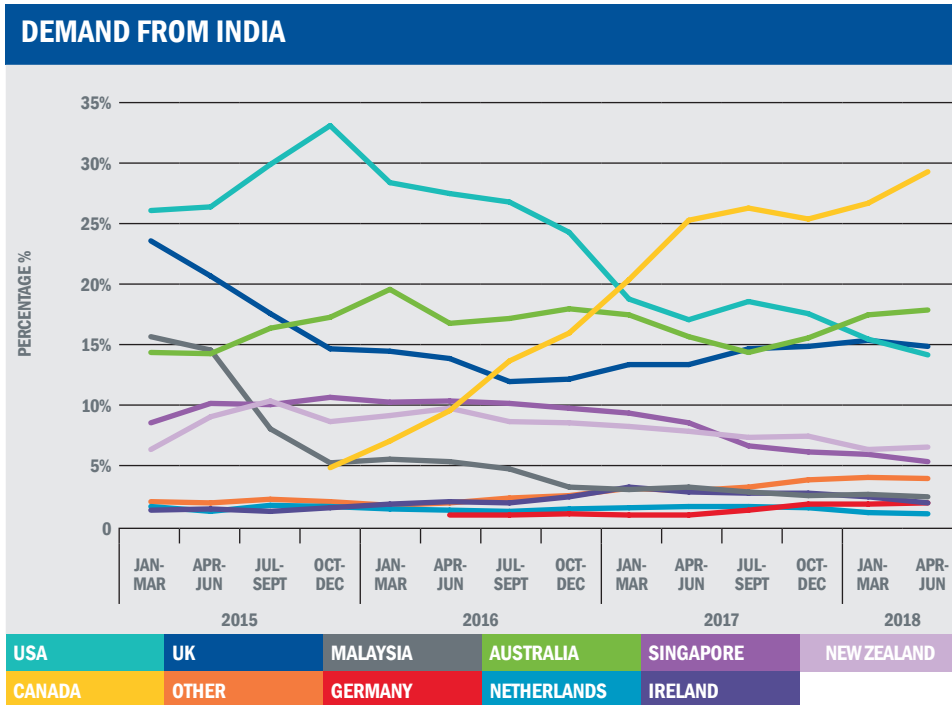
Steady increases from Poland, Portugal, and Spain are more encouraging.

INTERNATIONAL SEARCH BEHAVIOUR

This section uses data from Hotcourses Group's international insights demand tool to analyse online search behaviours of students from across the world: what are they interested in studying, where are they interested in studying and how is this changing from year to year?

The data focuses on three key recruitment regions: India, the Middle East and the EU.

SEARCH BEHAVIOUR IN INDIA



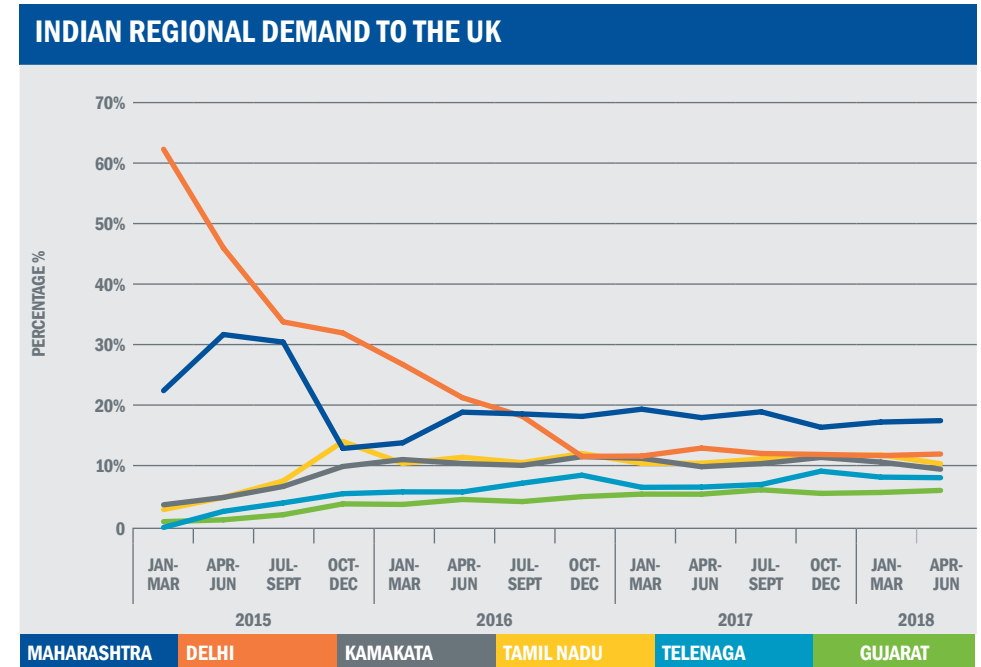
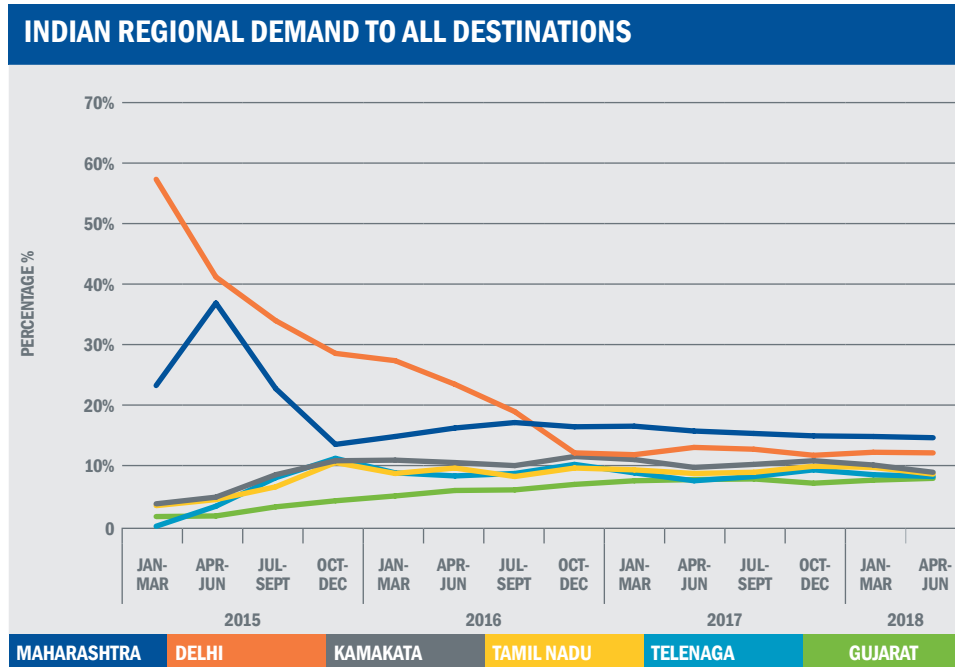
Top left shows prospective student interest from India to the top 10 global destinations.

- Watch the rise of **CANADA** since mid 2015 (from nowhere to the clear top position)

- Note the significant decline looking at the **US**
- The **UK** steadily declines from 2015 to mid 2016, then begins a small recovery

Top right shows demand from prospective students in India, looking at 5 key destination countries only: UK, USA, Canada & Australia.

WHERE PROSPECTIVE STUDENTS LIVE IN INDIA



The graphs above show the regional breakdown of where students from India are based. Top left is for Indian students looking at all international destinations, top right is for Indian students looking at UK only.

Notice the significant drop off in the proportion of students from Delhi, demand from other regions is more stable.

SUBJECT DEMAND FROM INDIA

2016

80,193

STUDENTS



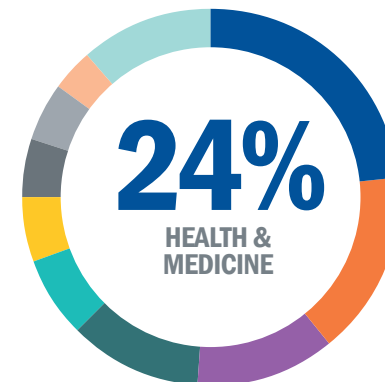
SUBJECTS

● Health & Medicine	20.2%
● Engineering	19.4%
● Business Management	12.7%
● Applied and Pure Sciences	10.1%
● Creative Arts and Design	6.4%
● Social Studies and Media	6.2%
● Travel and Hospitality	5.9%
● Computer Science and IT	4.4%
● Architecture and Construction	3.5%
● Other	11.2%

2017

164,002

STUDENTS



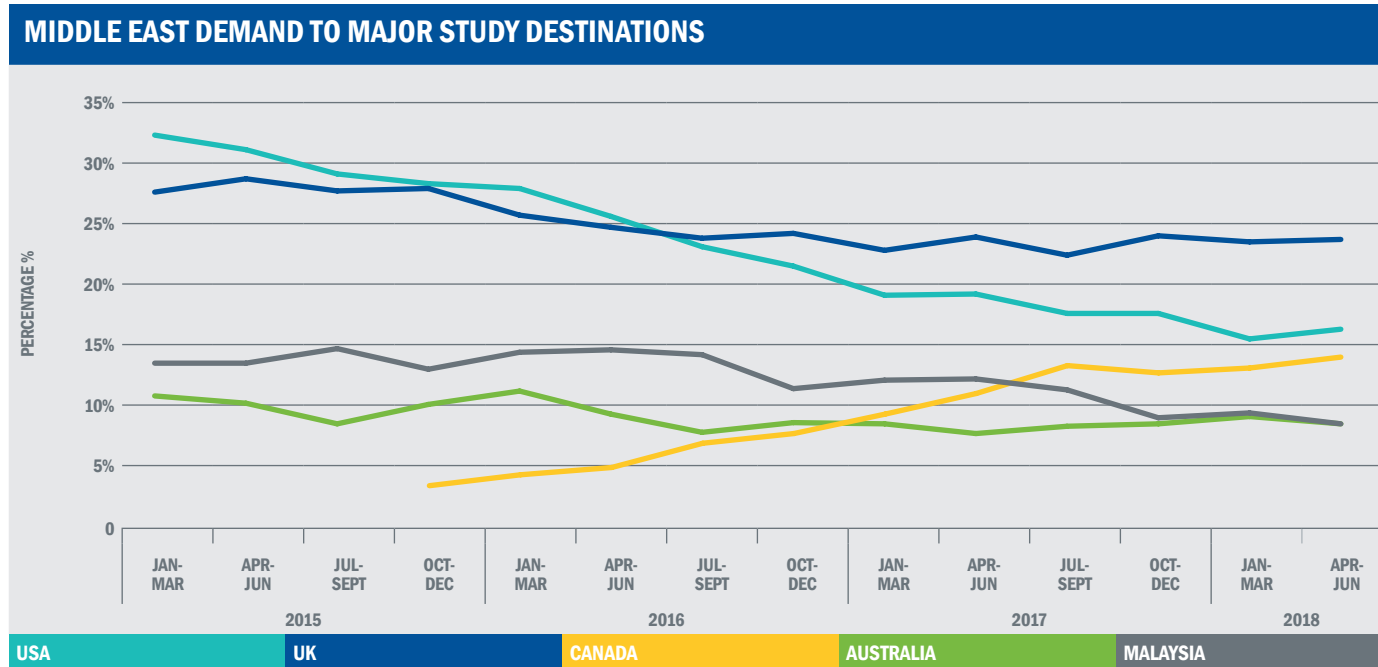
SUBJECTS

● Health & Medicine	23.6%
● Engineering	15.6%
● Business Management	12.0%
● Applied and Pure Sciences	11.3%
● Creative Arts and Design	7.1%
● Social Studies and Media	5.6%
● Travel and Hospitality	5.0%
● Computer Science and IT	4.9%
● Architecture and Construction	3.6%
● Other	11.3%

The pie charts show high level subject demand from students researching all countries from India during 2016 and 2017.

- The rank order for the top 6 subject areas remains the same
- Health and Medicine has strengthened in 1st position, growing from 20.2% in 2016 to 23.6% in 2017
- Engineering remains the 2nd most researched subject area, but falls from 19.4% in 2016 to 15.6% in 2017

SEARCH BEHAVIOUR IN THE MIDDLE EAST

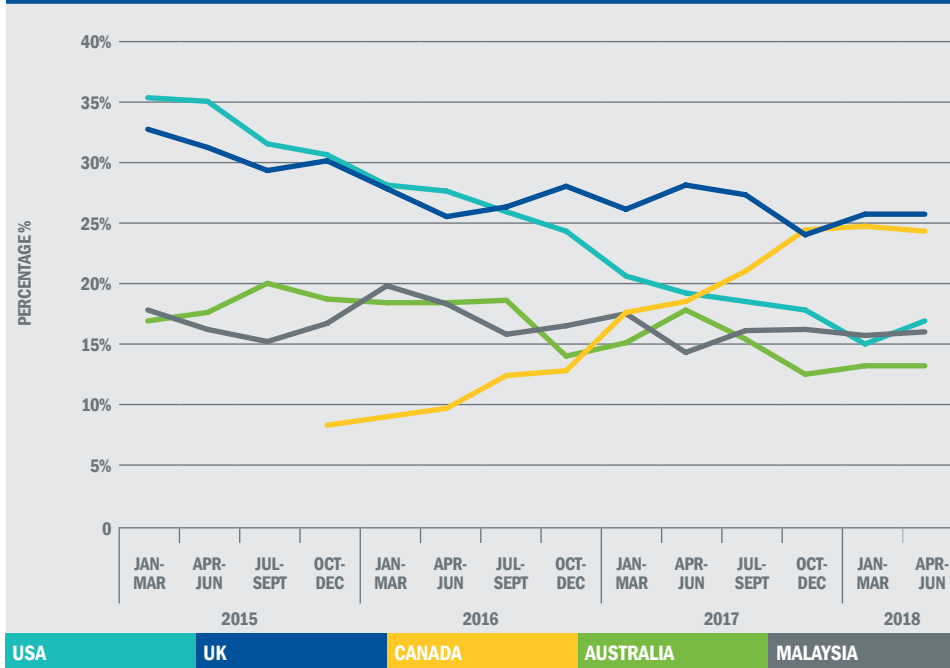


Across the Middle East (top left) as a whole, and Saudi (next page) and the UAE (next page) there is a significant drop in demand for students looking at the USA.

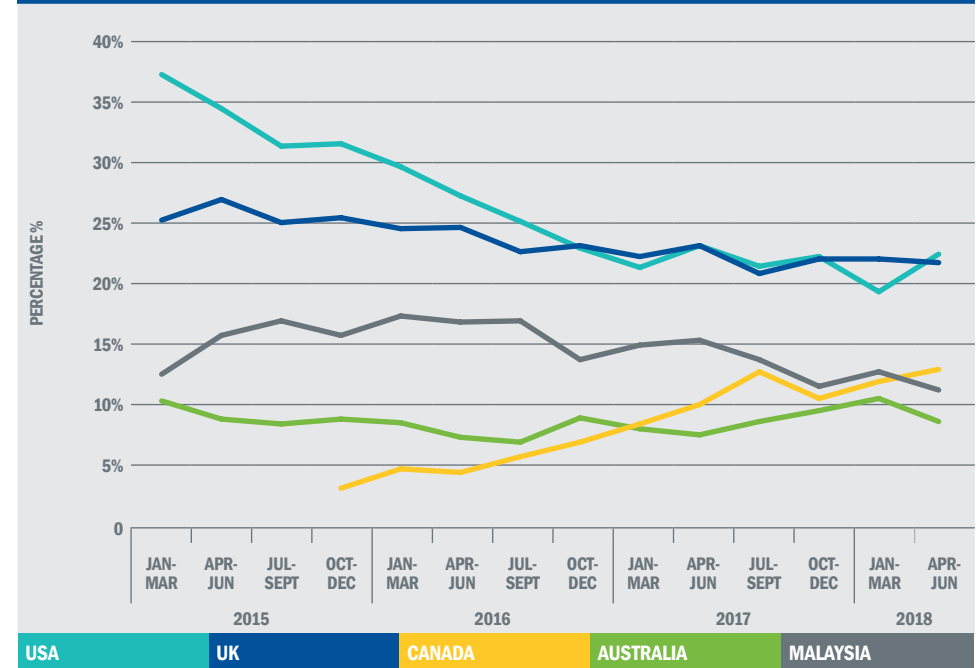
Although the UK loses some share from each market too, it is proving more resilient than the US, and has largely remained stable in 2017.

SEARCH BEHAVIOUR IN THE MIDDLE EAST

UAE DEMAND TO 5 MAJOR DESTINATIONS



SAUDI DEMAND TO 5 MAJOR STUDY DESTINATIONS

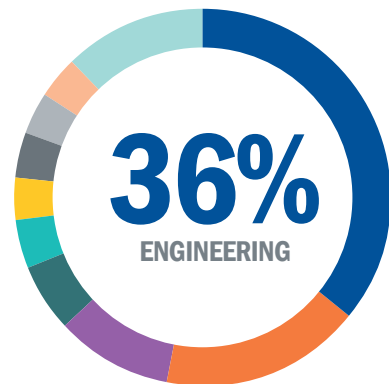


SUBJECT DEMAND DEMAND FROM SAUDI ARABIA (GLOBAL)

2016

348,934

STUDENTS



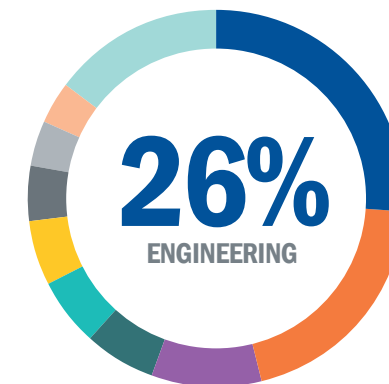
SUBJECTS

● Engineering	35.9%
● Health and Medicine	17.4%
● Business Management	10.0%
● Law	5.8%
● Creative Arts and Design	4.0%
● Computer Science and IT	3.8%
● Applied and Pure Sciences	3.8%
● Humanities	3.7%
● Architecture and Construction	3.6%
● Other	12%

2017

292,268

STUDENTS



SUBJECTS

● Engineering	26.2%
● Health and Medicine	20.0%
● Business Management	9.4%
● Creative Arts and Design	6.2%
● Applied and Pure Sciences	5.8%
● Computer Science and IT	5.6%
● Humanities	4.6%
● Law	3.9%
● Social Studies and Media	3.7%
● Other	14.6%

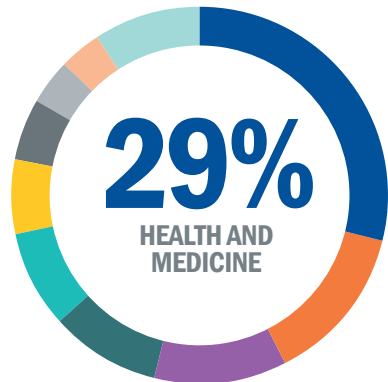
When exploring internationally, students from Saudi Arabia are most likely to be looking at Engineering related subjects followed by health and medicine and business management.

SUBJECT DEMAND DEMAND FROM SAUDI ARABIA (UK ONLY)

2016

64,111

STUDENTS



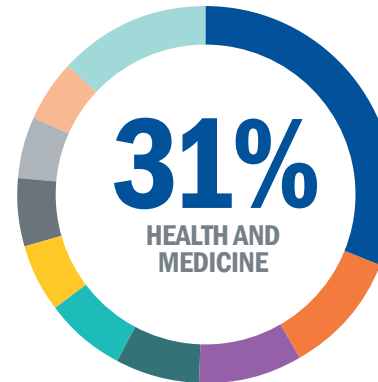
SUBJECTS

● Health and Medicine	29.0%
● Law	13.5%
● Engineering	11.5%
● Architecture and Construction	9.4%
● Business Management	8.4%
● Applied and Pure Sciences	6.4%
● Humanities	5.2%
● Computer Science and IT	4.0%
● Social Studies and Media	3.5%
● Other	9.1%

2017

53,388

STUDENTS



SUBJECTS

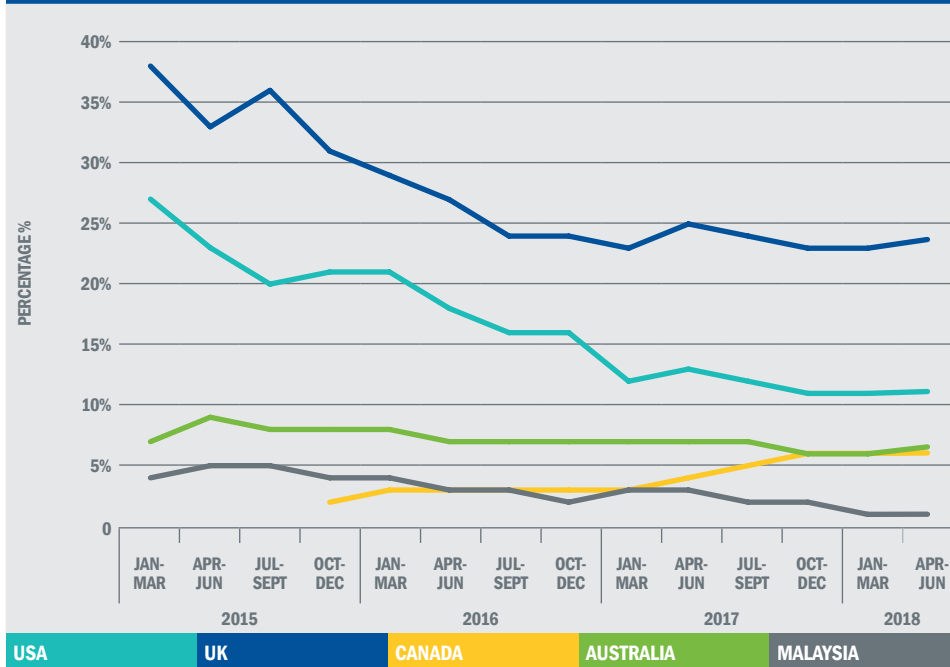
● Health and Medicine	31.3%
● Business Management	10.5%
● Engineering	9.0%
● Architecture and Construction	7.0%
● Applied and Pure Sciences	7.0%
● Law	5.9%
● Humanities	5.8%
● Creative Arts and Design	5.4%
● Social Studies and Media	5.1%
● Other	13.0%

However when looking at the UK, Health and Medicine is the most explored subject.

Indeed Health and Medicine has grown its share of UK searches from 29% in 2016, to 31% in 2017 though total demand has fallen by over 17% during this period.

SEARCH BEHAVIOUR IN EUROPE

EUROPEAN DEMAND TO 5 MAJOR DESTINATIONS



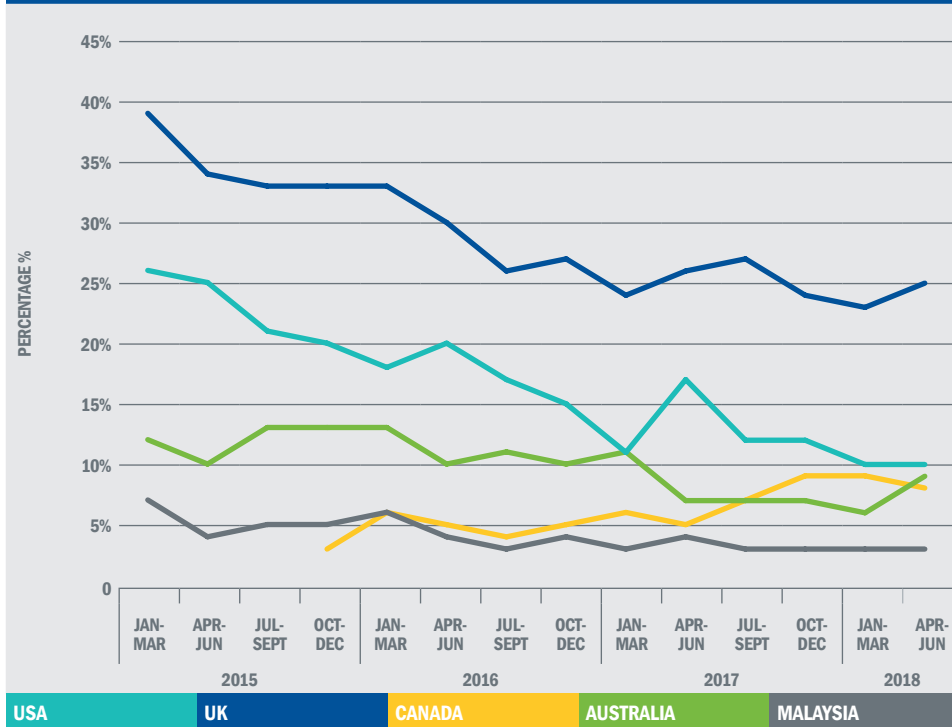
This chart shows where prospective students from across all European countries are researching looking at 5 key destinations: UK, USA, Malaysia, Australia & Canada.

Despite Brexit, the UK maintains its position as the top destination – however it has fallen from around 35% to 25% of market share, despite a slight rise in 2018.

The big takeaway from European demand is that all major destinations are losing market share, as many students look to stay in country or consider other destinations.

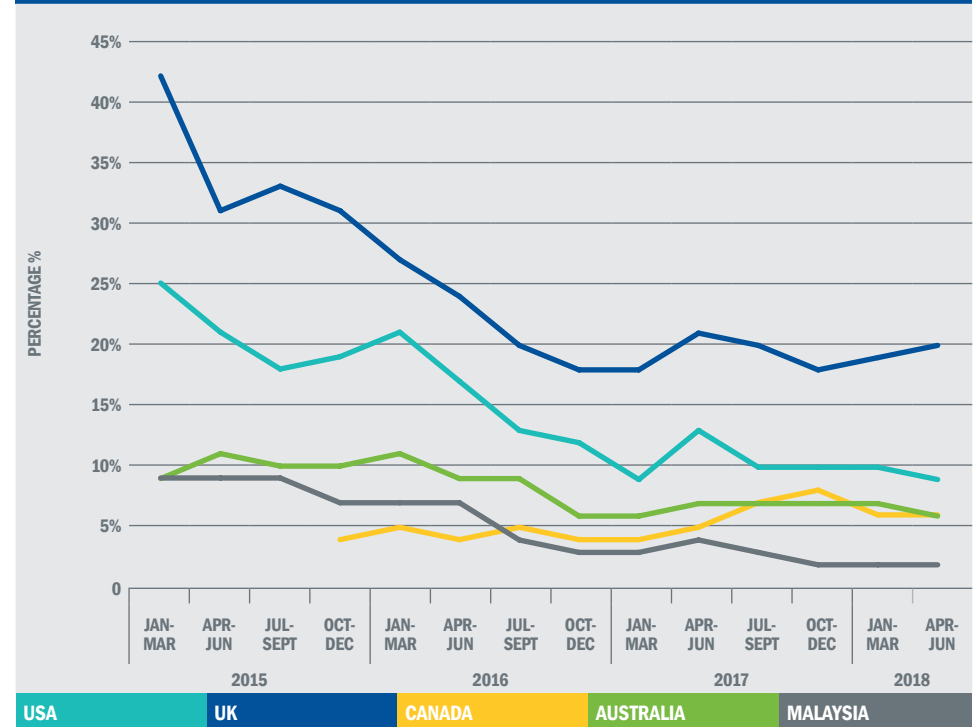
KEY EUROPEAN COUNTRIES BREAKDOWN

FRENCH DEMAND TO MAJOR DESTINATIONS



Demand from French students to most major destinations slips over the 3 year period shown. Canada increases from nowhere in 2015 to around 10% by 2018 but has started to fall again in 2018’.

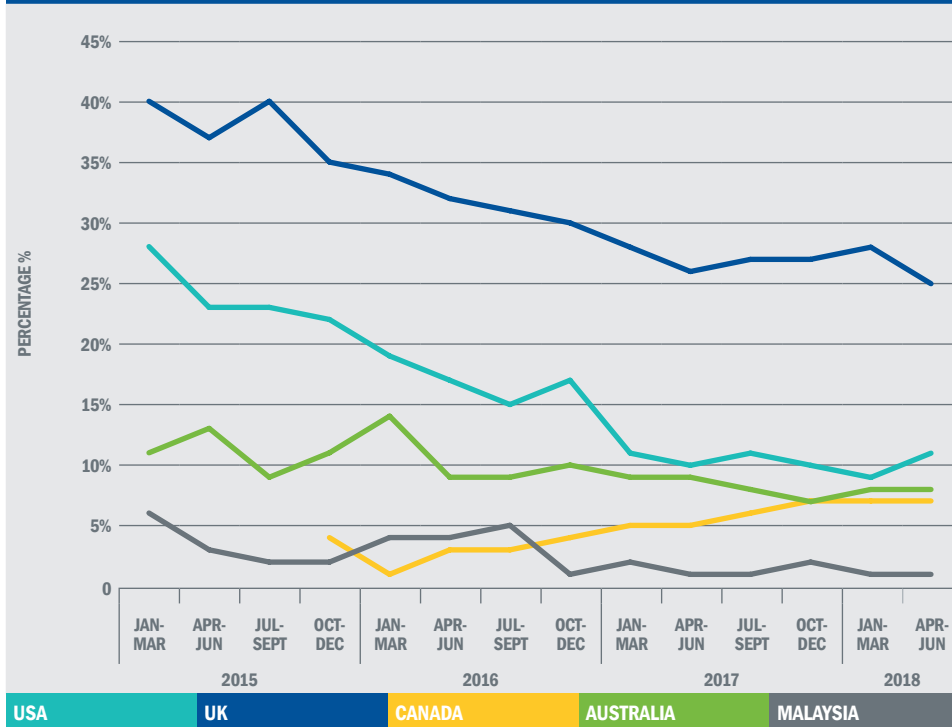
GERMAN DEMAND TO MAJOR DESTINATIONS



There is a fairly significant drop in German interest in the UK through 2015 and 2016, however this stabilises into 2017 and increases again, quite sharply, in 2018.

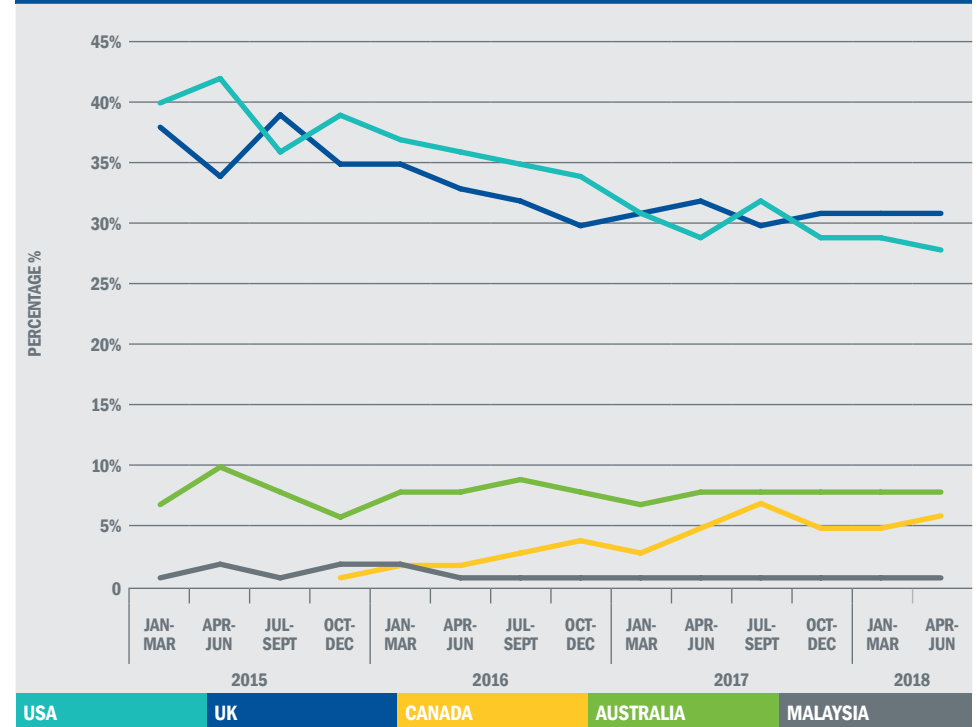
KEY EUROPEAN COUNTRIES BREAKDOWN

ITALIAN DEMAND TO MAJOR DESTINATIONS



The UK maintains its position as the top searched destination amongst Italian students, although market share drops from around 40% to 30%. There is a steep decline in US interest, and Canada steadily increases throughout from a low base.

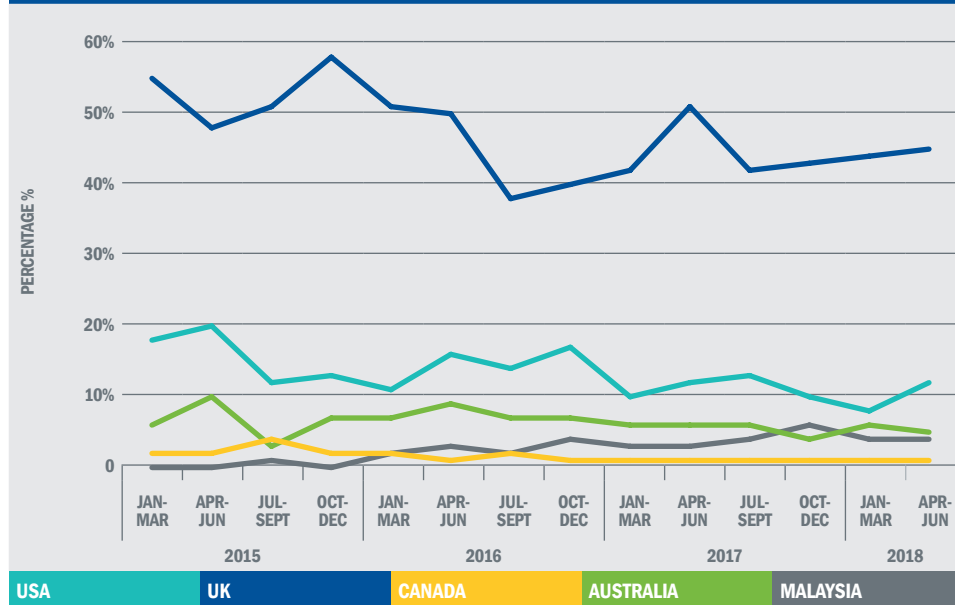
SPANISH DEMAND TO MAJOR DESTINATIONS



Demand from prospective Spanish students is dominated by the UK and USA as destinations, accounting for around 75% of interest.

KEY EUROPEAN COUNTRIES BREAKDOWN

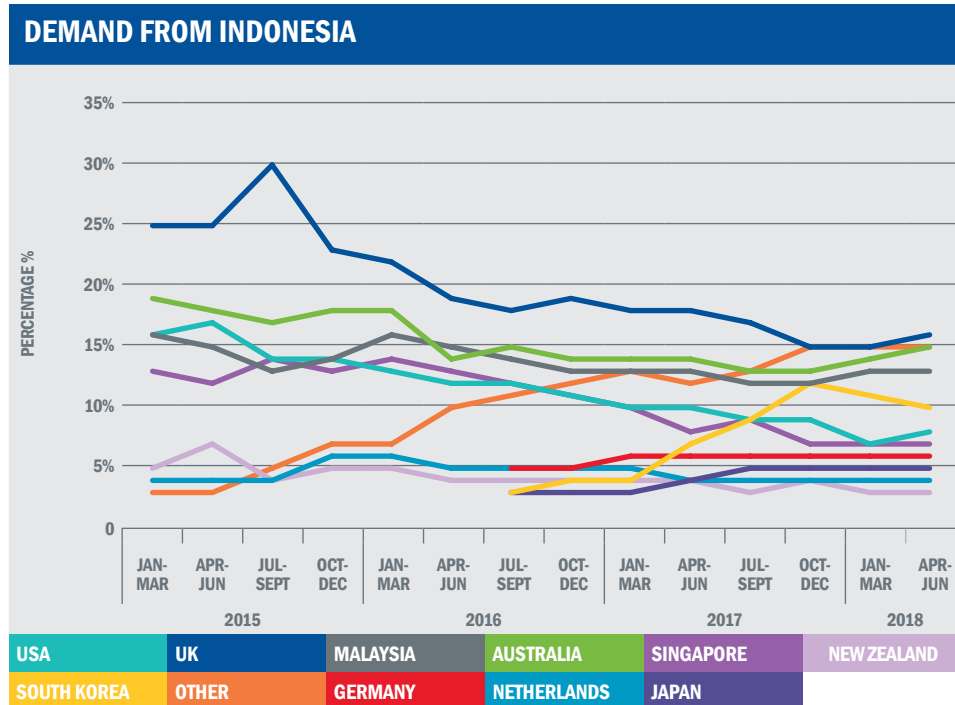
GREEK DEMAND TO MAJOR DESTINATIONS



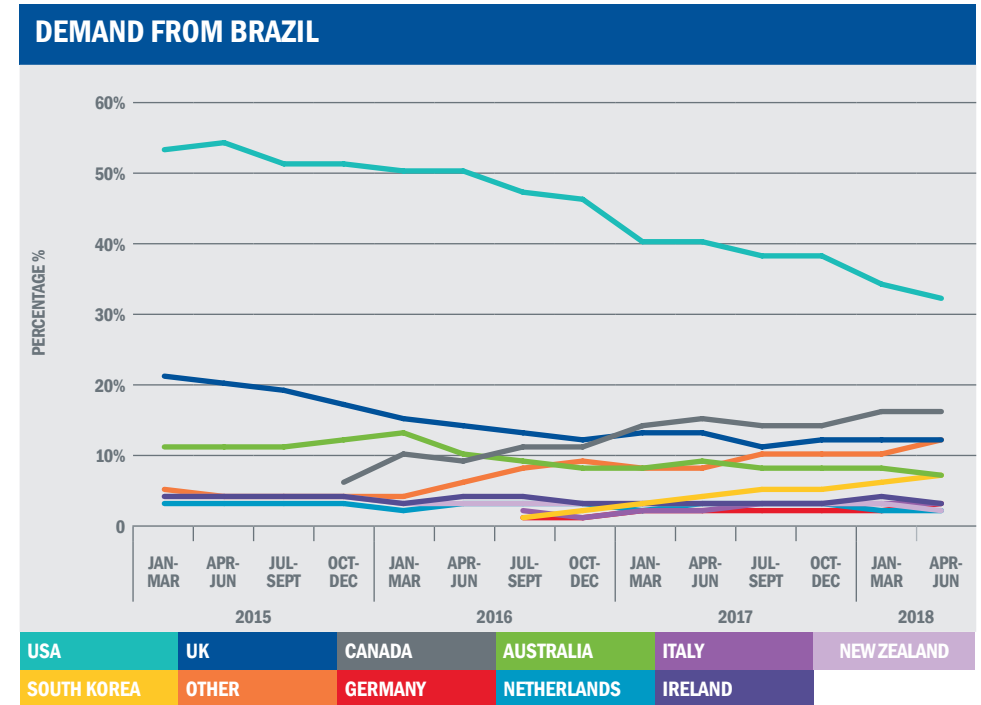
The UK remains the most searched for destination amongst Greek students through this 3 year period, with demand hovering around 50%.

Interestingly there is no obvious trend for the key destination countries, with movements up and down.

SEARCH BEHAVIOURS IN INDONESIA AND BRAZIL



There is a convergence of demand from prospective Indonesian students looking at key destination markets. The UK falls from around 25% to 15% of market share.



There is a steady decline in demand from Brazilian students looking at the US. The UK also slips from around 20% to 12%. Notable rise in interest to Canada.

NOTES ON DATA

INTERNATIONAL COMPETITORS

Australia

- Australia data does not include New Zealand students and only includes those on students' visas
- Students studying at two institutions will be counted twice
- Academic year runs January to December

Germany

- Study abroad students included

Japan

- Study abroad students included

USA

- US data excludes students on OPT (post-study work visa system)

VISA APPLICATIONS

- It's important to note that these are just application numbers. Not all of these visas will be granted, and not all of those whose visas are granted will take up their offers
- However, the total number of visa applicants made up 97% of total new non-EU enrolments for the past three years, so it's increasingly reliable as an indicator of new non-EU student enrolments

UCAS APPLICATIONS

- EU students accepted through UCAS comprise 98% of all new EU student enrolments at UK HEIs. (31,350/31,865 in 2016-17)

SOURCES

INTERNATIONAL COMPETITORS

- **UK:** HESA EU and non-EU enrolments and new enrolments
- **US:** IIE Open Doors data, available from <http://www.iie.org/Research-and-Publications/Open-Doors/Data>
- **Canada:** CANSIM https://www150.statcan.gc.ca/n1/en/subjects/education_training_and_learning
- **Germany:** The German Academic Exchange Service, via Project Atlas (IIE), including study abroad students
- **Japan:** Japan Student Services Organization (JASSO) via Project Atlas (IIE), including study abroad students
- **Australia:** Australian Government Department of Education and Training, international student data <https://internationaleducation.gov.au/research/International-Student-Data>
- **France:** MENESR-DGESIP/DGRI-SIES, MENESR-DEPP, available from http://publication.enseignementsuprecherche.gouv.fr/eesr/9/EESR9_ES_14-les_etudiants_etrangers_dans_l_enseignement_superieur.php
- **China:** China Scholarships Council via Project Atlas

VISA APPLICATIONS

- **Home Office:** <https://www.gov.uk/government/statistics/immigration-statistics-year-ending-march-2018> UCAS

UCAS EU APPLICANTS DATA

- **UCAS:** <https://www.ucas.com/corporate/data-and-analysis/ucas-undergraduate-releases/2018-cycle-applicant-figures-march-deadline>
- **Populations:** <http://ec.europa.eu/eurostat/tgm/refreshTableAction.do?tab=table&plugin=1&pcode=tps0001&language=en>

INTERNATIONAL DEMAND

- **Hotcourses Group**