

TRANSFORMING LIVES: STRATEGY FOR THE INTERNATIONAL TRANSFORMATION OF THE UNIVERSITY OF SUFFOLK: GOING GLOBAL

Transforming lives through
education,
knowledge exchange,
innovation and
entrepreneurship



**University
of Suffolk**

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INTRODUCTION

Our “Academic Strategy for Sustainable Development and Growth” states that: *“Developing our brand internationally will be one of our key challenges over the next five years. The University is entering a crowded HE market that is struggling with external challenges (such as Brexit) and a hostile policy landscape...”*

This strategy paper considers the challenges and opportunities facing the University in a global education market, identifies the key elements of our international strategy, and provides proposals to develop the University internationally.

INTERNATIONAL MARKETS AND CHALLENGES FACING OUR UNIVERSITY

The UK Higher Education sector has been going through significant changes over the last two decades, which has had a direct and indirect impact on all aspects of the sector's activities from direct recruitment of overseas students to research collaborations and international partnerships.

The Immigration Rules for students changed on 31 March 2009, when the Government introduced the "Tier 4"—the new points-based system. By December 2015, the number of non-EU student arrivals hit a nine-year low of 167,000 (Guardian, Thursday 14 July 2016). In recent years—and more so in response to the result of the EU referendum—there has been a notable increase in the number of English-taught Bachelor and Masters programmes delivered in Europe, allowing EU institutions to increase their quota of international students and revenue, as well as international faculty¹. Although the UK has a long-history of delivering high quality higher education, concerns over visa and immigration policies (combined with the rising costs of tuition) could see European markets such as the Netherlands and Germany overtake the UK as more popular study destinations.

As a new University entering a noticeably crowded Higher Education market—with very little international exposure, or indeed, international partnership or collaborations—the University of Suffolk has a significant challenge at hand to break into the global market and develop its brand internationally.

A comprehensive report produced by UUK in 2017, emphasises that the UK "is an extremely popular destination for international students, attracting more students from abroad than any other country except the much larger USA... International students also bring great benefits to the UK, enhancing the experience of domestic students, developing the UK's international networks and reputation, and boosting national and local economies. On and off campus spending by international students and their visitors generates £25.8 billion for the UK economy..."

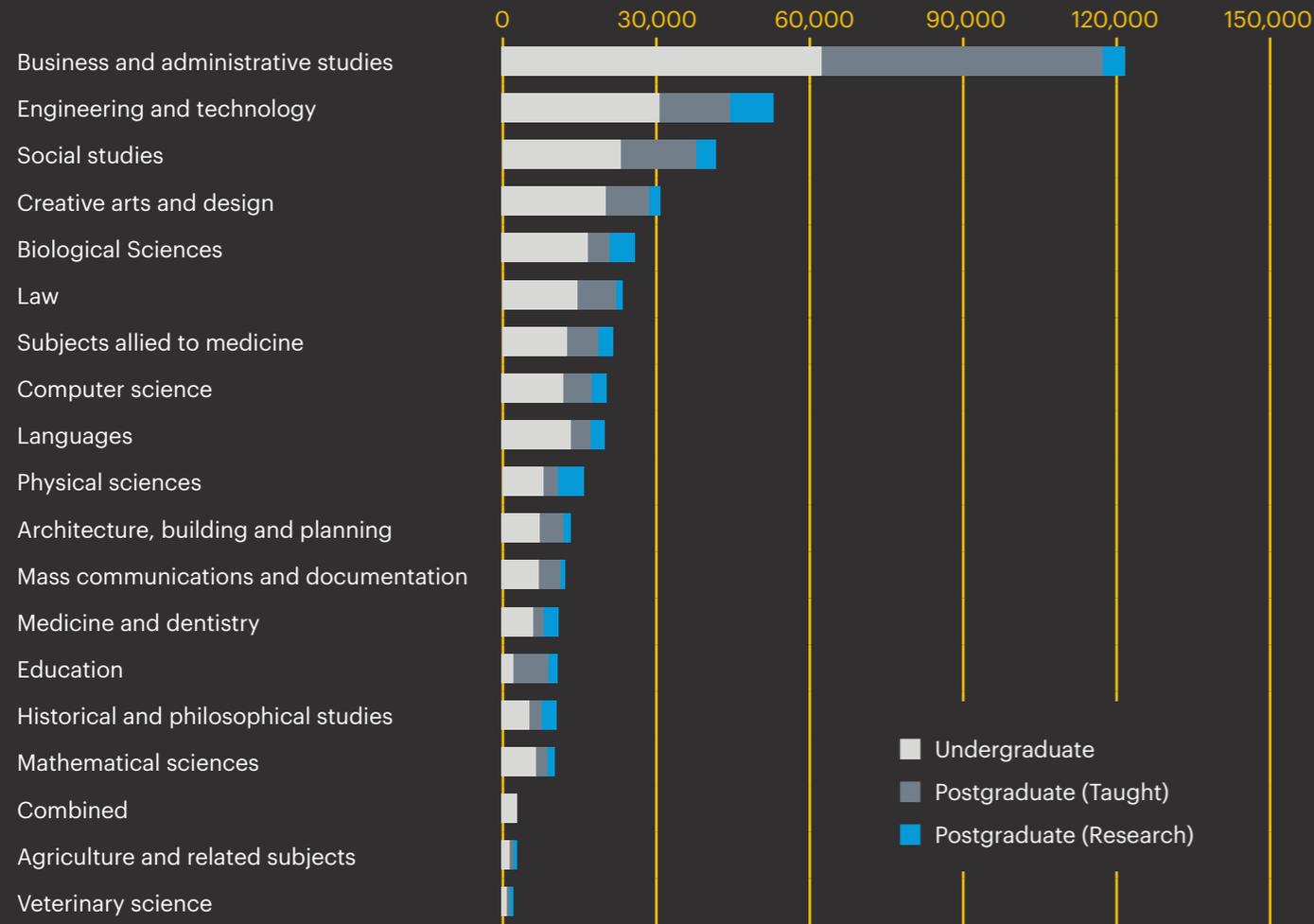
In terms of International students' engagement with the UK HEIs, the graph on the next page, from the UUK report, provides an interesting picture.

¹ ICEF Monitor: <http://monitor.icef.com/2017/09/fifty-fold-increase-english-taught-bachelors-degrees-europe/>

WHAT DO INTERNATIONAL STUDENTS IN THE UK STUDY?

27%
The percentage of international students studying business and administrative studies.

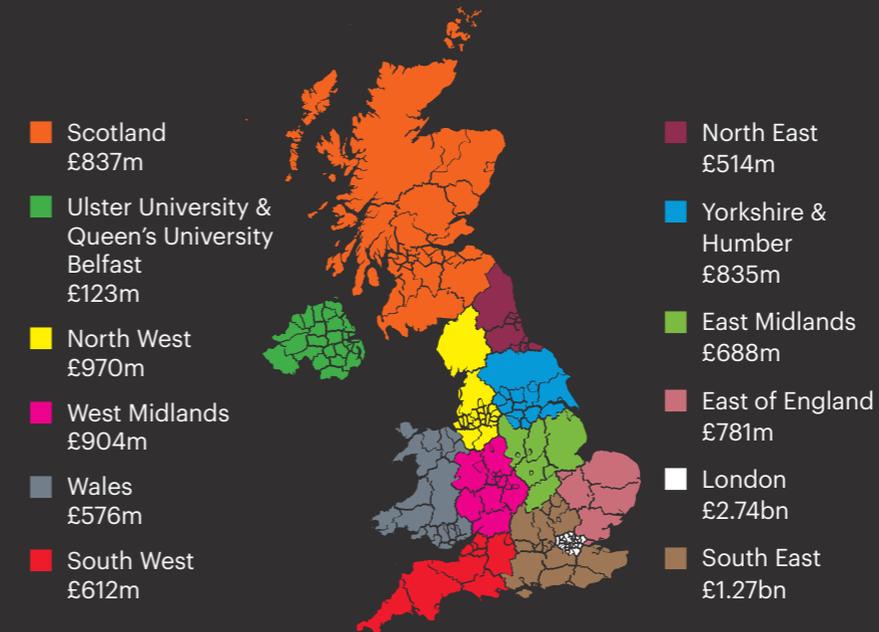
Figure 6: International students in the UK by subject and level of study, 2016-17



Source: HERSA Student record (2016-17)

THE ECONOMIC IMPACT OF INTERNATIONAL STUDENTS

The national and regional impact of International students is very significant both for economic growth and regional development (source UUK report).



Source: Universities UK (2017) The Economic Impact of International Students; Universities Scotland (2013) Grow, Export, attract support; Universities Wales (2015) the Economic Impact of Higher Education in Wales; Universities UK (2017) The Economic Impact of Queen's University Belfast and Ulster University on the Northern Ireland Economy; Department for Education (2018), UK revenue from education related exports and transnational education activity in 2015.

Note: The figures for Scotland, Wales and Northern Ireland represent total export earnings and therefore include international income earned by HEIs from overseas businesses, charities, governments.

£25.8bn

Economic output generated for the UK economy through on and off-campus spending by international students and their visitors.

In 2014-15:

£13.6bn

Gross value added generated by international students on and off-campus spending

£12.9bn

Total revenue of higher education related exports and transnational education activity

206,00

Full-time equivalent jobs supported by international students studying in the UK

TRANSNATIONAL EDUCATION

Considering the regulatory issues, including Tier4 visa and UKVI, the changing requirements in the HEI sector have moved towards a more flexible model of overseas student engagement and developing transnational educational models.

707,915
Students undertaking
UK HE Transnational Education.

Figure 10: Trends in the UK HE TNE student numbers, 2012–2013 to 2016–2017

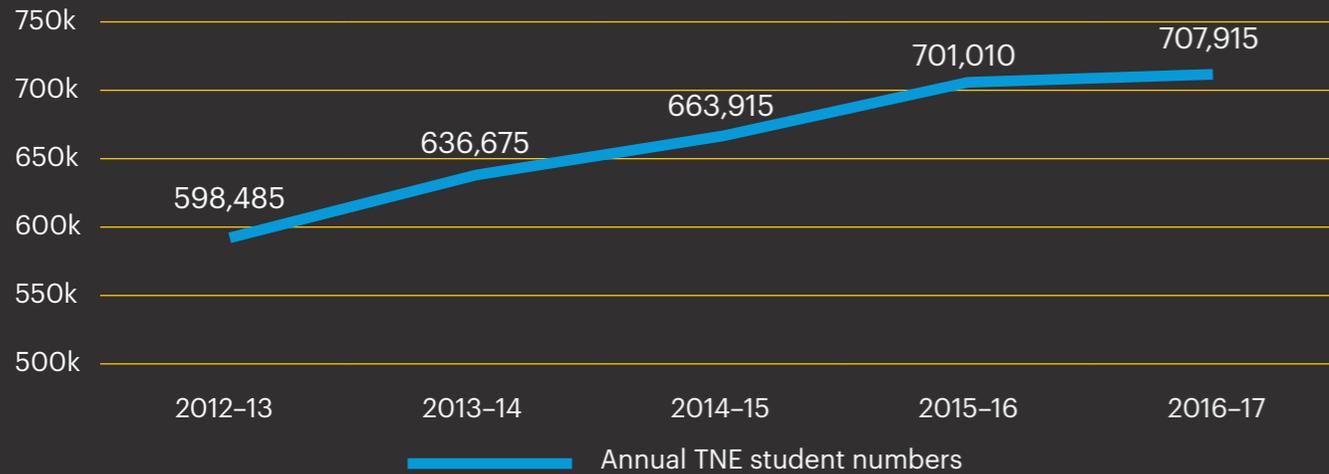
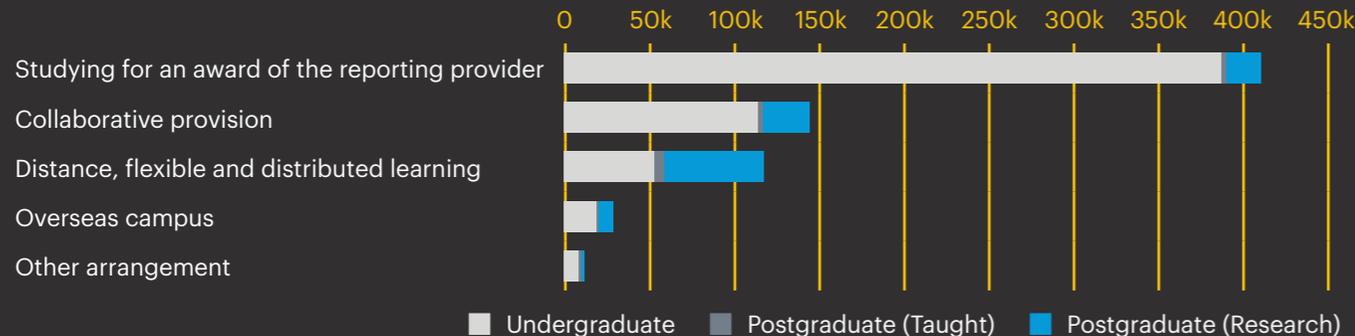


Figure 11: UK HE TNE student numbers by type of provision



Source: HESA Aggregate Offshore Record [multiple years]

KEY ISSUES EMERGING FROM EVALUATING THE INTERNATIONAL STUDENT LANDSCAPE IN UK

Key issues emerging from evaluating the International student landscape in the UK are:

- Sector challenges in terms of overcoming the Tier4 and UKVI barriers;
- Drop in the number of EU students coming to UK over the past three years (from 312K in 2014/15 to 307K in 2016/17);
- Political issues - UK viewed as a “hostile destination” and significant increase in competition from EU countries including Germany, Netherlands and France;
- More students on PG (PGT and PGR) courses that UK (around 60% doing PG with 27% of them doing Business related subjects);
- Growth in TN education (from 590K in 2012/13 to 707K in 2016/17)

Key Components of our Strategy

To develop the University of Suffolk’s international presence, this strategy proposes the following key components:

1. Developing our brand internationally;
2. Increasing our direct on-campus overseas student recruitment (portfolio development especially in postgraduate Business and STEM areas);
3. Developing Staff and Students as Global Citizens;
4. Developing International Partnerships (UG, PG, Research and Business);
5. Working towards a model of technology enhanced global delivery.



1. DEVELOPING OUR BRAND INTERNATIONALLY

Both as a geographical location in the UK and as a University, Suffolk is largely unknown in key international markets such as China, South East Asia, India, the Middle East, and Africa. We are not currently featured in any world rankings (including the “World Best Young University” ranking) and it will be a few years before we can appear on these, as these rankings primarily relate to research, the number of international students, and impact.

In recent years there have been significant changes to the international student market. Competition is fierce among higher education institutions, not only in the UK, but on a global scale. Political and legislative instabilities within traditional host markets such as the USA and UK are seen to be impacting the behaviour of international students, where we are witnessing significant growth in international enrolments to countries such as Canada and Australia. Other traditional markets such as China and Malaysia are investing heavily in local higher education, creating insecurities for other traditional host markets.

Following the University gaining its independence, we now need to develop a robust set of initiatives to establish ourselves as a high-quality provider and to be able to successfully compete on the global stage. The following initiatives are proposed:

- A well-planned and concentrated brand awareness marketing/PR campaign, in several key markets (the campaign needs to be in-line with our development of our distinctive portfolio and research areas);
- Development of a dedicated International portal, offering information as well as taster sessions, and virtual open days;
- Closer collaborations (including joint initiatives) with quality international partners; and
- Use of specific International social media portals to establish the University’s brand abroad.

2. INCREASING OUR OVERSEAS STUDENTS' RECRUITMENT (PORTFOLIO DEVELOPMENT ESPECIALLY IN POSTGRADUATE BUSINESS AND STEM AREAS)

As the UUK research shows, there are several key characteristics relating to overseas students and the range of courses they study in UK.

Nearly 69% of overseas students coming to the UK study Business, Technology, and Engineering-related courses. Furthermore, most of these students (over 60%) are either engaged in postgraduate taught or postgraduate research degrees.

Pre-independence, the University was unable to recruit overseas students, and fully develop its UG and PG portfolio. It is therefore not surprising that the current University portfolio has significant gaps in its postgraduate taught portfolio. Furthermore, and as far as postgraduate research is concerned, it will be another 4-5 years before we can achieve "Research Degree Awarding Power" (RDAP). These limitations will undoubtedly have an impact on our capability to recruit International students and now need to be addressed as a matter of urgency.

It is therefore recommended that the following actions are considered:

- A systematic review of the University's PGT portfolio, with the view of developing new provisions that are more attractive to the overseas markets and linked to **our emerging areas of distinctiveness**;
- Development of pre-sessional courses to provide bridging for overseas students wanting to do a programme of study with the University;
- Developing partnerships with overseas providers, based on 2+2 or 2+1 models, where students from partner institutions come to University of Suffolk for the final phase of their programme;
- Reviewing our network of agents and appointing new ones where appropriate to increase direct recruitment activity;
- Working with LSC on direct recruitment to the Ipswich campus for business-related UG and PG courses.

Appendix I – produced by our External Relations Office, provides a detailed analysis of various overseas markets, and highlights those more appropriate for the University of Suffolk to concentrate its resources on.

3. DEVELOPING OUR STAFF AND STUDENTS AS GLOBAL CITIZENS

Our 'Learning, Teaching and Assessment Strategy' sees the value of developing a number of graduate attributes for our students, which includes "global citizenship". The University has already established a number of valuable links with prestigious European, American, Canadian and other International partners through study exchange programme and ERASMUS - this has subsequently enabled our staff and students to develop invaluable links and partnerships, whilst establishing our University's reputation abroad.

Our University's vision clearly states that we are a 'community-impact University' – it therefore follows that the University and its staff and students must endeavour to make a positive contribution within communities not only in Suffolk, but around the world. We strongly believe in equality and diversity and therefore strive to nurture a learning and teaching environment which simultaneously supports an international outlook, and gives our staff and students access to language and cultural learning.

To achieve this:

- We will develop our global partnership and exchange programmes (including the ERASMUS programme, whilst the UK can still retain its membership), and Study abroad programmes;
- Running bespoke summer courses in collaboration with external stakeholders (short courses – CPDs as well as accredited programmes);
- Hosting international events and conferences, thereby strengthening the University's links with existing partners as well developing new ones, linked to our distinctive areas;
- Embedding a global outlook into our UG and PG curriculum;
- Developing research collaborations and staff exchange with Universities across Europe and the globe.

4. DEVELOPING INTERNATIONAL PARTNERSHIPS (UG, PG, RESEARCH AND BUSINESS)

The 'British Council', in their report *The Scale and Scope of UK Higher Education Transnational Education (2016)*, notes that "as demand for higher education outstrips supply globally, transnational education is growing rapidly. Delivered through a wide variety of programmes and platforms (distance learning programmes, teaching partnerships, off-shore campuses and, recently, MOOCs), what are the pros and cons of these? What is the geographical spread of TNE and its impact?".

According to the same report, AOR data for 2015 indicates that of the 134 UK HEIs in the HESA database, 99 are currently involved in provision of UK HE for students that study wholly outside the UK and are either registered with the reporting institution or are studying for an award of the reporting institution. Overall, a total of 665,995 students are involved in TNE provision with UK HEIs.

This same report lays out the spread of UK TNE programmes across the globe as follows:

Host country	UK HEIs delivering TNE	No of programmes delivered by all UK HEIs in the country
Singapore	21	205
Malaysia	16	178
Greece	9	127
Hong Kong	14	120
United States	4	120
Canada	4	105
China	16	92
Germany	10	92
Nigeria	3	87
India	9	82
Sri Lanka	6	74
Trinidad and Tobago	4	68
South Africa	4	62
Oman	8	57
Australia	3	53
Dubai	9	50
France	1	50
Switzerland	4	48
United Arab Emirates	5	45
Ireland	6	42

Source: WECD, 2014/15 TNE Survey.

There are several different models used by UK HEIs in developing TNEs. These include:

- Establishing a campus in the host country (possibility of collaborating with local Health trusts);
- Validated delivery, where the UK HEI recognises the host institution's programme for delivery as its own;
- The Franchise Model, where UK HEIs programme are delivered by host organisations in their country;
- Dual awards, where both partners recognise the same degree, and students graduate with two degrees from the two partnering institutions;
- Flying Faculty, where University's staff fly out to the host HEI to deliver our courses in an intense block-model format;
- Blended delivery, mostly done through online platforms, with some face-to-face short interaction in home country or internationally.

Since gaining Independence in 2016, the University has been approached by many different providers to establish partnership links in several countries. These partnerships could be an area of significant growth for the University, as well as helping the University establish its brand internationally. Whilst the potential financial rewards could be significant, there are also serious quality and reputational challenges that necessitate careful consideration of each proposal before the University enters into these partnerships. We are seeking up to 6 key partnerships, that can bring-in a surplus of at least £100K minimum for the partnership to be worthwhile pursuing.

We would also be considering a campus abroad with prestigious partners and in collaborations with industry partners in our emerging and distinct areas of strength such as Health.

5. WORKING TOWARDS A MODEL OF TECHNOLOGY-ENHANCED GLOBAL DELIVERY

There has been much debate about the impact of technology within education in general—and higher education in particular—due to the fact that there has been significant growth in the online higher education market. A report by ‘Orbis Research’ in the US found that the Global E-Learning Market is accounted for \$165.21 billion in 2015 and is expected to reach \$275.10 billion by 2022.

The UK distance/online learning market has also been expanding, and there is also a growing number of private and HEIs providers involved in offering online courses.

Furthermore, with the establishment of the University brand internationally, offering online courses to a global market (including UK) should be an area to be explored and developed in the long-term. Upfront investment and technical infrastructure will be required to develop this area for the University over the next five years.

Over the next academic year, as part of the “International Transformation of University of Suffolk” strategy implementation, we will:

1. Put in place an overseas recruitment plan for the next three years, the first phase of this plan will concentrate on marketing the University abroad and brand building;
2. Start the delivery of an “International Foundation” course in Ipswich for overseas students progressing to L4/5 (starting with 25 new overseas students and to be doubled every year for the next three years);
3. Oversee the successful delivery of our MBA (2+1 model) in Malta, Sri-Lanka and Malaysia;
4. Develop the University’s new international partnership framework and consider the development of 1 new International partnership for 2019/20 (Franchise Validated model);
5. Develop the University’s new International Web portal dedicated to overseas students (including virtual tours, student testimony);
6. As part of developing our PGT portfolio and more emphasis on blended/block mode delivery we will explore the possibility of offering our blended “Early Childhood Studies Degree in Brunei” as a pilot project;
7. Working with CELT, we will finalise the University of Suffolk graduate attributes to include “International” as one of the key attributes embed in our portfolio.

APPENDIX I

INTERNATIONAL RECRUITMENT STRATEGY: MARKET RESEARCH

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Executive Summary

In response to the Academic Strategy and Professional Services Review, the International Team in collaboration with the Market Research and Development Team has undertaken a piece of research which aims to identify current trends in global higher education, specifically relating to international student recruitment in the UK.

Competition is fierce among higher education institutions not only in the UK, but globally. Political and legislative instabilities within traditional host markets such as the USA and UK are seen to be impacting the behaviour of international students where we witness significant growth in international enrolments to countries such as Canada and Australia. Other traditional sending markets such as China and Malaysia are investing heavily in local higher education, creating insecurities for other traditional host markets.

Over recent years there have been significant changes to international enrolments in the UK. For instance, China continues to dominate overall enrolments, Indian student numbers have declined in response to changes to post-study work rights, and instabilities within the Nigerian economy have seen dramatic shifts in mobility trends. On the contrary, there are many positive stories to celebrate. Indian and Chinese enrolments are projected to strengthen, and emerging markets such as Indonesia and Nigeria will take a greater place within the international arena.

In response to the University gaining independent status, and increased competition in the UK and overseas, the University is now in an ideal position to develop robust International Recruitment and Marketing strategies and this paper sets out recommendations for target regions and countries such as, South East Asia, India, Nigeria and the Middle East. Subject to the approval of these recommendations, further research, budget planning and country recruitment plans will be developed.

Scope

This report will:

- i. Highlight global competition which may impact UK Higher Education
- ii. Analyse external data to identify trends in foreign enrolments in the UK
- iii. Provide an overview of historic and current recruitment practices at the University
- iv. Identify new market opportunities for the University of Suffolk

Section One: Competition in Global Higher Education

In recent years, and more so in response to the result of the EU referendum, there has been a notable increase in the number of English-taught bachelor and master programmes which are delivered in Europe, allowing EU institutions to increase their quota of international students and revenue, as well as international faculty². Although the UK has a long-history of delivering high quality higher education, concerns over visa and immigration policies combined with the rising costs of tuition could see European markets such as the Netherlands and Germany become more popular study destinations.

Canada has seen a significant increase in their number of international enrolments over recent years as a result of changes to immigration policy and aggressive marketing to promote Canada as a study destination. Chinese and Indian students accounted for 50% of all international student enrolments to Canada in 2016, showing the shifting trends of two of the UKs most important source markets. International students are attracted to Canada due to its perception as a safe and politically stable country, where Indian students are particularly attracted by the post-study work opportunities which have been introduced, and which the UK no longer offers³. The number of foreign students in Canada grew by 92% between 2008 and 2015, and it is reported that many students would now choose Canada over the UK given the result of EU referendum combined with the quality and affordability of Canadian higher education.⁴

China is notably one of the greatest source markets for UK institutions, however China has its own ambitious growth targets to increase the number of international students it welcomes. In recent years, China has significantly increased government spending on local higher education in order to improve the status and world rankings of their own institutions.⁵

The recently published 'One Belt, One Road' initiative, sets out plans for China to become one of the top study destinations for international students.⁶ The initiative aims to strengthen education, science and research collaborations between China and countries such as Hong Kong, Singapore, Vietnam and other pacific countries. This poses threats to future collaborations between UK institutions and those in the aforementioned countries.

Aside from Canada and China, other traditional sending markets are rapidly improving the quality of their local higher education provision, with the aim of encouraging students to remain in their home countries. Countries such as Malaysia, Qatar and Singapore are developing as important educational hubs and emerging as rivals to traditional study destinations such as the UK.⁷ Malaysia has set its own ambitious growth targets to recruit 250,000 international students by 2025.⁸ It is thought that there are now more students studying towards a UK degree within Malaysia under TNE than there are Malaysian students coming to the UK to complete their studies. The knock-on effect on this increased TNE activity within Malaysia is also attracting international students from around the region to choose Malaysia as their study destination due to the availability and affordability of UK degrees.

The USA is a well-known study destination for international students all over the world, where the country hosts the greatest number of foreign students each year. Although this poses a threat to UK higher education, recent political turbulence combined with less-favourable immigration policies is making the USA a less desirable study destination among Asian students particularly.⁹

² ICEF Monitor: <http://monitor.icef.com/2017/09/fifty-fold-increase-english-taught-bachelors-degrees-europe/>

³ ICEF Monitor: <http://monitor.icef.com/2017/11/canadas-international-student-enrolment-surged-2016/>

⁴ ICEF Monitor: <http://monitor.icef.com/2016/11/canadas-international-student-enrolment-up-8/>

⁵ Pie International: <https://thepienews.com/news/china-plans-for-heis-to-be-ranked-as-world-class-by-2050/>

⁶ The Times Higher: <https://www.timeshighereducation.com/news/china-will-teach-500000-international-students-2020>

⁷ Oxford University: http://www.ox.ac.uk/sites/files/oxford/trends%20in%20globalisation_WEB.pdf

⁸ Pie International: <https://thepienews.com/analysis/can-malaysias-rise-to-regional-education-hub-continue/>

⁹ NY Times: <https://www.nytimes.com/2018/01/02/us/international-enrollment-drop.html>

Section Two: Regional Trends for UK Higher Education

The following section of the report aims to highlight some of the education and mobility trends across the world. HESA data covering the period between 2012/13 and 2016/17 has been used to illustrate the number of new international entrants to the UK - entrants refers to first-time enrolments in the UK. Other secondary sources have been used to discuss around these figures. This is not an exhaustive amount of research but helps to identify areas of interest for future discussion.

South East Asia

This region has seen a decline in the number of UG entrants annually since 2013/14, with a decrease of 16% (-1765) between 2012/13 and 2016/17. Malaysia has experienced a significant decline in UG entrants of 22% (-1310) over the five year period, however the country is a powerful regional hub for transnational education, and it is thought that there are more Malaysians studying towards a UK degree in Malaysia than in the UK. Malaysia hosted the largest number of UK HE TNE students in 2015/16, a figure standing at 14,890 – a market share of 14.2% of all UK HE TNE students.¹⁰

Malaysia and Singapore share 70% of the regional UG market share, where Malaysia alone accounts for 50% of all entrants (4560). Indonesia has seen the biggest increase in UG entrants over the period (82%/+245), although numbers are still smaller than other countries in the region. Business is the most popular subject among UG entrants in the region, but has seen a decline over recent years, with 2250 entrants in 2016/17. UG Law has grown over the period (21%/+250) with the majority increase coming from students in Malaysia, however numbers have plateaued in recent years.

The region has seen a 9% (+720) increase in PG entrants over the period, totalling 9190 entrants in 2016/17. Business remains the most dominant PG subject, holding 42% of the PG market share in 2016/17. Thailand holds the greatest market share of PG entrants from the region (33%/3050 in 2016/17), followed by Indonesia with a 20% share, representing 1820 entrants in 2016/17 and a growth of 15% (+1130) over the five year period. Although Malaysia held 18% of the PG market share in 2016/17 (1650), entrants have been in annual decline between 2013/14 and 2016/17 (37%/-1070). Vietnam is the fourth biggest PG market.

¹⁰ Universities UK: <http://www.universitiesuk.ac.uk/International/Documents/The%20Scale%20of%20UK%20HE%20TNE%202015-16.pdf>

Indonesia, Thailand and Vietnam are predominantly PG markets, due to the attractiveness of one year Master degrees, with Business being the most popular subject at UG and PG levels. Interestingly, Creative Arts and Design is the second most popular subject for UG entrants in Indonesia, although the number of entrants remains relatively small.

Indonesia has a fast-growing middle class and tertiary aged population which is contributing to increased outbound mobility of students. Places at top universities in Indonesia are competitive, therefore students are looking at overseas study to improve their employment opportunities. Australia continues to be the most attractive destination for Indonesian students, followed by the US and Malaysia.¹¹ There has been a 16.6% increase in the number of Tier 4 visas issued to Indonesian students between 2006 and 2016.¹²

According to UNESCO, Indonesia is forecasted to see the third fastest growth in tertiary enrolments over the next ten years behind India and China respectively, and features in the top 10 forecasted growth markets for outbound student mobility.¹³

Vietnam has seen steady annual economic growth over the last 20 years, and shares a similar young aged population to Indonesia. Growing middle and upper class incomes combined with dissatisfaction in the quality of local provision, and competition for places, is forcing Vietnamese students to seek education overseas. The US remains a popular destination, with Canada's post-study work options becoming increasingly attractive.¹⁴

Malaysia is fast-becoming known as a regional international hub for Higher Education, with ambitious targets to recruit 250,000 international students by 2025.¹⁵ Although this presents challenges for recruitment to the UK, it does present opportunities for the University to further engage in TNE activity within the country. Top sending countries include Asian nations such as Bangladesh and Indonesia, as well as the Middle East and African countries. Foreign to domestic student ratios is one of the highest in the world at 1:10, with this trend being inline with the rising mobility and cooperation among ASEAN nations and the planned creation of the ASEAN Economic Community, which should facilitate credit transfer, mobility, quality assurance and research collaboration.

¹¹ ICEF Monitor: <http://monitor.icef.com/2017/06/indonesias-growing-middle-class-expected-drive-outbound-mobility/>

¹² British Council: <https://education-services.britishcouncil.org/country/indonesia/market>

¹³ British Council: *International student mobility to 2027: Local investment, global outcomes (Jan 2018)*

¹⁴ ICEF Monitor: <http://monitor.icef.com/2018/01/vietnams-growing-middle-class-fueling-demand-study-abroad/>

¹⁵ Pie International: <https://thepienews.com/analysis/can-malaysias-rise-to-regional-education-hub-continue/>

Malaysia has seen strong economic growth, and is forecasted to continue this trend with GDP per person set to rise between 2016 and 2021. Budget cuts to higher education since 2016 are expected to hit public and research intensive universities the most, however consumer education spending is increasing rapidly and demand for education is high.¹⁶ UNESCO predicts that Malaysia will be one of the countries to see the biggest decline in outbound students over the next ten years, behind South Korea.¹⁷

Thailand has a declining and ageing population, with the working-age population set to decline by 2018. Thai students turn to private education due to concerns over quality and education reforms within public institutions. The number of tertiary education students has been in decline since 2011, however interest in higher education abroad has increased due to improved secondary graduation rates and higher aspirations to continue with education, with the perception that tertiary education is linked with middle-class living, professional employment and higher income. The US hosts the greatest number of Thai students, however these figures are declining and Thai entrants to the UK have increased since 2016, most probably due to the quality of UK education and links between Thailand and the UK. An ageing population, declining tertiary aged population and decrease in demand for local participation in education could be seen as both an opportunity and threat.¹⁸

South Asia

India is a major player in international higher education mobility within this region, and indeed in the world, but remains a market which is acutely affected by political and legislative instability in destination countries such as the US and UK.

The number of Indian students studying in the UK peaked in 2010/11 at 40,890, but has since declined annually down to 18,010 in 2015/16.¹⁹ India is predominantly a PG market, where 7% of new entrants in 2016/17 were for PG courses. In 2016/17 there were 7140 new PG entrants to the UK, down 21% (-1870) since 2012/13, although there was a small growth of 9% (+615) between 2015/16 and 2016/17.

¹⁶ British Council: *Malaysia: Country Brief (June 2017)*

¹⁷ British Council: *International student mobility to 2027: Local investment, global outcomes (Jan 2018)*

¹⁸ British Council: *Thailand: Country Brief (June 2016)*

¹⁹ British Council: <https://education-services.britishcouncil.org/country/india/market>

Business remains the most popular UG and PG subject, with the number of new entrants to PG Business programmes showing signs of recovery between 2015/16 and 2016/17 after three years of decline. Entrants to UG Business, Engineering and Subjects Allied to Medicine have declined over the last five years.

It is worth noting at this stage, that entrants from other South Asian countries such as Bangladesh, Nepal, Sri Lanka and Pakistan have been in decline over the last five years. Pakistan and Bangladesh are the largest markets behind India with 2765 and 1195 respective entrants in 2016/17.

India and China account for the world's most mobile populations, with India being a key driver in overall mobility not only to traditional English speaking countries such as the US and UK, but China and Germany. Between 2013 and 2015, Indian enrolments grew by 62% in the US, 50% in Australia and 40% in Canada, however in contrast UK enrolments have declined year-on-year for the last five years. This is mostly attributed to increasingly restrictive visa policies and the removal of post-study work rights.²⁰

If the pace in the growth of Indian enrolments to key markets such as the US, Australia, Canada and New Zealand continues, it is thought that India will play an increasingly important role in driving overall enrolment levels, especially if the slow down in growth from China continues.²¹ It is worth noting that Canada saw a 57% increase in the number of Indian enrolments between 2015 and 2016, totalling 76,320.²²

Between 2012 and 2015, China and India were the two biggest sending markets, accounting for 40% of global growth in outbound students. These countries also dominated the tertiary aged population (18-22) in 2015 and remain heavy influencers of global higher education trends. Over the next ten years, India will retain its share of tertiary aged population (25%), whereas China is expected to see a decline. India will have the second fastest growing tertiary aged population, in terms of actual numbers, over the next ten years, and Pakistan is also expected to grow significantly in this area. India will close the gap behind China to significantly increase the number and proportion of tertiary enrolments due to favourable demographics and greater participation in local higher education.

²⁰ ICEF Monitor: <http://monitor.icef.com/2017/02/watch-for-shifts-in-indian-outbound-this-year/>

²¹ ICE Monitor: <http://monitor.icef.com/2016/06/indian-outbound-key-destinations-18-2015/>

²² ICEF Monitor: <http://monitor.icef.com/2017/11/canadas-international-student-enrolment-surged-2016/>

Over the next ten years, India will be the second biggest growth market (behind China) for outbound students (+185,000), however it is worth noting that Pakistan, Bangladesh and Nepal are set to grow in this area by 32,000, 27,000 and 20,000 students respectively.²³

The number of visas issued to Indian students incoming the UK increased by 27% to 12,384 in the first three quarters of 2017, while Pakistan increased by 37% and Bangladesh saw 24%. In all three of these countries, visa growth rates were well over 20 percentage points higher than those seen between 2015 and 2016.²⁴

Central and East Asia

As reported earlier, China [and India] dominates the tertiary aged cohort of students worldwide, and continue to heavily influence global student mobility trends. Although India is expected to increase its market share of tertiary aged students over the next 10 years, China is set to decline in this area due to its ageing population. Having said this, China outperforms India when we consider the proportion of tertiary enrolments against tertiary aged students. China and India will continue to lead the growth of tertiary enrolments globally, and combined are expected to account for 60% of all growth in outbound mobility to 2027.²⁵

To give some context to the scale of Chinese enrolments, there were more than 66,000 new entrants to the UK from China in 2016/17, representing an 18% (+9905) increase compared to 2012/13 and 7% (+4305) increase compared to 2015/16. China will continue to be a key sending market for the majority of UK institutions, however this does pose risks regarding the reliability of China as a primary source market. Chinese institutions have a rich history of collaboration with UK institutions, with many students enrolling in the UK via progression or articulation programmes.

²³ British Council: *International student mobility to 2027: Local investment, global outcomes (Jan 2018)*

²⁴ British Council: <https://education-services.britishcouncil.org/news/market-news/tier-4-visa-data-shows-very-strong-growth-non-eu-student-numbers>

²⁵ British Council: *International student mobility to 2027: Local investment, global outcomes (Jan 2018)*

Africa

Nigeria will continue to be the most important African market for institutions, with 5480 new entrants to the UK in 2016/17. Having said this, there has been a significant decline in the number of Nigerian entrants since 2012/13. There has been a 33% (-875) decline in UG entrants, and 47% (-3250) decline in PG entrants over the past five years, with a notable 30% (-1540) decline between 2015/16 and 2016/17.

Changes to UK enrolments are down to plummeting oil prices and poor exchange rates for the pound and dollar making it difficult for Nigerian families to cover the cost of overseas study. In 2016, the Central Bank of Nigeria announced that it would no longer sell foreign currency to pay for overseas study, although with the correct documents students were still able to bid for currency. Even though the UK remains a popular study destination for Nigerian students, poor exchange rates and visa restrictions are forcing parents to consider other study destinations such as Canada – where students also benefit from favourable post-study work rights.²⁶ In early 2017 the Bank of Nigeria reopened sales of overseas currency for study abroad, which has been welcomed by agents and families and it is hoped this will help to aid the recovery of the UK market.²⁷

In 2016/17, Engineering, Business and Law each had a 20% share of new entrants at UG level, followed by Computer Science with 8% of all entrants. PG Business holds a 29% share, followed by Engineering (19%) and Computer Science (8%).

According to the British Council, by 2027 Nigeria will have the fastest growing tertiary aged population of over 24m students, overtaking Brazil, Pakistan, Indonesia and the US. Clearly this will have an effect on the number of tertiary enrolments, where Nigeria is forecast to see an increase of 1.2m. Ethiopia is also set to more than double their tertiary enrolments from 1.1 to 2.8m. Ghana and Kenya are expected to see an annual increase in tertiary enrolments of 4.8% and 4.7% respectively, between 2015 and 2027. Over the same period, Nigeria will expect to see a 30,000 increase in outbound students.

²⁶ PIE International: <https://thepienews.com/news/nigerians-cope-with-triple-processing-time-for-forex/>

²⁷ PIE International: <https://thepienews.com/news/nigeria-reform-forex-overseas-study/>

Although the youth population of Kenya is growing, outbound mobility is much smaller than countries such as Nigeria. This is in part due to the significant expansion of local higher education – in 2013 enrolments to local higher education sat at around 360,000, which has since increased to around 470,000 in 2015.²⁸ Aside from neighbouring African countries such as Uganda, the US remains the most popular destination for Kenyan students.²⁹

Entrants from Ghana have fallen 22% (-255) between 2012/13 and 2016/17, with a 19% increase between 2015/16 and 2016/17. The number of entrants from South Africa has been following an upward trend over the last five years (22%/+160), although overall numbers remain smaller than Kenya and Ghana.

Middle East

As an important region for UK HE TNE activity, Middle Eastern countries such as UAE, Qatar and Saudi Arabia show some interesting trends relating to outbound mobility. Saudi Arabia had the greatest number of outbound students in 2013 (73,548), and the greatest number of students studying in the UK (9,344), representing 12.7% of all outwardly mobile Saudi Arabian students. 8,530 UAE students were outwardly mobile in the same period, of which 3,025 studied in the UK – this represents 35.5% of all outbound UAE students.

UK market share of outbound students from the region in 2017 was strong – Qatar (39%), UAE (35%), Bahrain (25%) and Oman (15%). The US holds the greatest market share of Saudi Arabian and Kuwaiti students. Demand for UG study from Gulf countries has increased 121% between 2007 and 2015, from 4,675 to 10,325 students, with a 127% increase in PG study over the same period - from 3,460 to 7,860. Saudi Arabia is the only PG dominant market within the region.³⁰

Kuwait and Qatar have seen the biggest growth in UG entrants between 2012/13 and 2016/17, (+555 and +460 respectively), opposed to Saudi Arabia which has been in decline (-355). Engineering and Business are the predominantly popular subjects in all markets. Kuwait and UAE have seen notable growth in entrants to UG Business and Engineering over recent years.

²⁸ ICEF Monitor: <http://monitor.icef.com/2017/10/kenya-become-growth-market-outbound-mobility/>

²⁹ ICE Monitor: <http://monitor.icef.com/2018/04/affordability-shaping-kenyan-outbound-trends/>

³⁰ Universities UK International: *State of the Relationship: UK Higher Education Engagement with the cooperation council for the Arab States of The Gulf (2017)*

In 2014/15, 76.2% of Bahraini and 69.7% of UAE entrants self-funded their studies in the UK, compared to 56% of Kuwaiti, 53.1% of Omani and 51.1% of Saudi students who received overseas government funding to study in the UK. 46% of Emirati students also received overseas government funding to study in the UK.

The Americas

The USA is the dominant sending market among North American countries, with around a 75% market share of all UG entrants and 81% of all PG entrants. According to HESA data, in 2016/17 there were 5400 undergraduate and 8420 postgraduate entrants from North America. Courses with combined routes and social studies are the most popular courses among North American students, but interestingly 83% (555) of all UG law enrolments were from Canada; this figure also shows that 45% of all UG entrants from Canada were for Law programmes. US entrants to Creative Art and Design courses have increased 38% between 2012/13 and 2016/17, with a significant 23% increase between 2015/16 and 2016/17.

The US market is well known as a ‘study abroad’ market, and it is estimated that the number of US students studying abroad for credit during the 2015/16 academic year grew 3.8% from 313,415 students to 325,339 students. Over half of these students were studying in Europe.³¹

In contrast, entrants to the UK from Central and South America are relatively small, and are predominantly for PG programmes such as Business and Admin Studies, Social Studies and Engineering. In 2014/15 the number of UG entrants from Brazil rocketed to 1060 (compared to 480 in 2012/13) due a government scholarship scheme, but sadly this figure has since dropped to only 180 entrants in 2016/17 now that the scheme has ceased. Although Mexico is the second largest UG market, the number of entrants in 2016/17 stood at only 145. Having said this, Mexico has seen year-on-year growth in PG entrants between 2012/16 and 2015/16, but this number plateaued at 1150 in 2016/17.

³¹ NAFSA: https://www.nafsa.org/Policy_and_Advocacy/Policy_Resources/Policy_Trends_and_Data/Trends_in_U_S_Study_Abroad/

Section Three: University of Suffolk International

International student recruitment was a challenge for the University prior to becoming independent, mainly due to the confusion associated with having degrees validated by two other universities. For some markets this was an alien concept and usually meant that UCS degrees were not recognised as accredited study programmes, and Government scholarships were often therefore not available to students. A number of non-EU markets have been tried and tested by previous international staff and include, but are not limited to: Turkey, Kazakhstan, Azerbaijan, India, Vietnam, China, Thailand and Indonesia. Limited success was seen in many of these countries for reasons stated above.

Becoming independent has slowly opened a number of avenues for the University, more specifically it has seen the University included on education ministry lists of approved institutions in important markets such as China. Most recently, the international team have been targeting South East Asian markets such as Thailand and Indonesia from which there are some successes to note. UK International has also been an important market for the University, attracting a small pool of students each year due to the proximity of the Campus to London.

The University has a network of agents in countries such as: Indonesia, Thailand, Malaysia, Vietnam, Nigeria, Ghana, Cameroon, India and Bangladesh. Although there is a good geographical spread, it is difficult to support agents in the way that they desire given that regular in-country presence is not possible due to budgetary constraints. Between July 2013 and 2017, the University employed an in-country representative; Offshore Education Services (OES), in Indonesia on a service-agreement basis. OES represented the University across all recruitment channels, maintaining contact with in-country agents, attending regular recruitment events and developing relationships with suitable higher education institutions. OES were paid an annual fee of £4000 and were given an £8000 marketing budget, both taken from the International Recruitment budget. OES terminated the contract in July 2017 to take up a similar in-country representative role for London South Bank University (under the Directorship of the previous UCS Director of International). This model saw a modest five enrolments in the final recruitment year.

Each year the University receives direct applications from a number of countries, and it is believed that the new University of Suffolk brand has attributed to this year's healthy increase in application numbers from countries such as, China, Ghana, India, Nigeria, United Arab Emirates and USA. Current applications are predominantly for postgraduate programmes such as MSc Applications of Psychology, MSc Business and Management, MBA and MSc Regenerative Medicine, however there is a pleasing increase in the number of applications to Professional Health programmes. Otherwise, applications are spread well across all academic Schools at undergraduate level.

It has been difficult to recruit to undergraduate programmes from many non-EU markets without a foundation offer, however it is pleasing to note that the University is due to validate an International Foundation Programme in July 2018 with pathways leading to programmes in the Business School, Science, Technology and Engineering, and Health Sciences.

Resourcing challenges (staffing and operational budgets) combined with a lack of an internationally relevant course portfolio, particularly at PG level, has held back the ability to increase the number of international students each year.

Section Four: Market Opportunities and Recommendations

Overview

There are a number of scenarios which present opportunities for the University to develop its International Recruitment Strategy further, however there are fundamental questions which the University must consider first. Expanding into established markets where UK education is well-known might allow the University to take a slice of the market share, however these markets are likely to be heavily saturated with other UK institutions with stronger brands and reputations and will therefore be very competitive. Conversely, the University might consider expanding into emerging markets such as Indonesia and South America, however these markets must first of all be educated about UK education meaning return on investment may be slower than desired.

Opportunities and Recommendations of target countries

South East Asia:

The University has seen some success in this region previously, and as this paper illustrates, markets within this region, namely Indonesia, are projected to expand significantly over the next decade in terms of their university aged population with the propensity to study in the UK. The University has also started to develop TNE activity in this region (Malaysia) which is an important component of the Internationalisation agenda. Given the work that has already been developed in this region it is recommended that an in-country representative is appointed to work across the region (Indonesia, Thailand, Malaysia and Vietnam) to support recruitment and partnership activities. The International Team should then also start to develop the agent network across the region further, as well as country recruitment plans.

South Asia (India):

As this paper illustrates, India is a major sending market and is set to grow substantially over the next decade in terms of its university aged population, economy and propensity for study abroad. Although other study destinations, such as Canada, are becoming popular among Indian students, the UK is a well-known and well-regarded study destination among Indian students and their parents. In the short-term, the University should research this market further to identify geographical regions to target and work to develop a strong network of UK focussed education agents.

Given the size and scale of the country, the University should consider appointing an in-country representative to develop and manage agent relationships, take part in recruitment events and develop a country recruitment plan. At this time, it is not envisaged that any other countries within the region should be further explored, however as partnership activity develops in Sri Lanka recruitment efforts could follow.

East Asia (China):

As with India, China has huge potential to create substantial recruitment streams, but due to the complexity and maturity of Chinese-UK institutional partnerships, direct recruitment should not be a priority. The University should continue to develop partnership arrangements with Chinese institutions in order to create stable streams of students who enrol via progression/articulation arrangements. Developing a competitive pre-session English offer for China should be a priority for the University. At this stage, it would not be recommended to explore other countries within the region due to declining demand for UK education.

Africa (Nigeria):

As this paper suggests, Nigeria has a strong history as an important sending market for the UK. Although recent economic instability has affected outward mobility, figures have shown signs of recovery and the country is projected to see significant growth in the number of tertiary aged students and the number of outwardly mobile students over the next decade. The University should conduct further research regarding the market and subsequently develop an agent network and country recruitment plan. Ghana as a second African market should also be explored given recent application trends to the University.

North America:

North America has the potential to be a strong study abroad market for the University, welcoming students on a short-term basis via International Exchanges or Study Abroad Programmes. Direct recruitment in this market could be a challenge given the high quality of local education and the infancy of the University of Suffolk brand, however the University should start by focussing attention on developing institutional relationships with US Colleges and Universities in collaboration with the Student Opportunities Manager.

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This should create steady streams of students joining the University on a short-term basis, under fee-paying and non-fee-paying arrangements. Future opportunities could be developed with the School of Art, Design and Humanities to recruit directly to their UG programmes. Although Canada is fast-becoming a popular study destination for international students, recruitment to the School of Law and Social Sciences could be developed given the propensity of Canadian students to study Law in the UK.

Middle East:

The Middle East presents many opportunities for the University to recruit government sponsored and self-funding students to a range of UG and PG programmes. The UK is a popular market among all countries within this region, and therefore should be an area of focus going forward. Before any recruitment activities go forward, the International team must work with the respective government departments responsible for accrediting foreign institutions. In the meantime, the University should start to develop agent networks and work towards developing an annual recruitment plan of activities.

Section Five: Summary

In order to move to the next stage in the development of the International Recruitment and Marketing Strategy, and subject to the approval of the above recommendations, further research, budget planning and country recruitment plans will be developed alongside a set of recruitment targets and associated KPI's.

It is worth noting that international recruitment and partnerships support one another, and therefore strategies should be harmonious. We would also encourage colleagues across the University to see international recruitment as an organisational objective, which is lived and breathed by professional services and academic schools. School recruitment strategies should be developed in collaboration with the International Recruitment, Marketing and Partnerships team to ensure a consistent approach and effective use of resources.

