



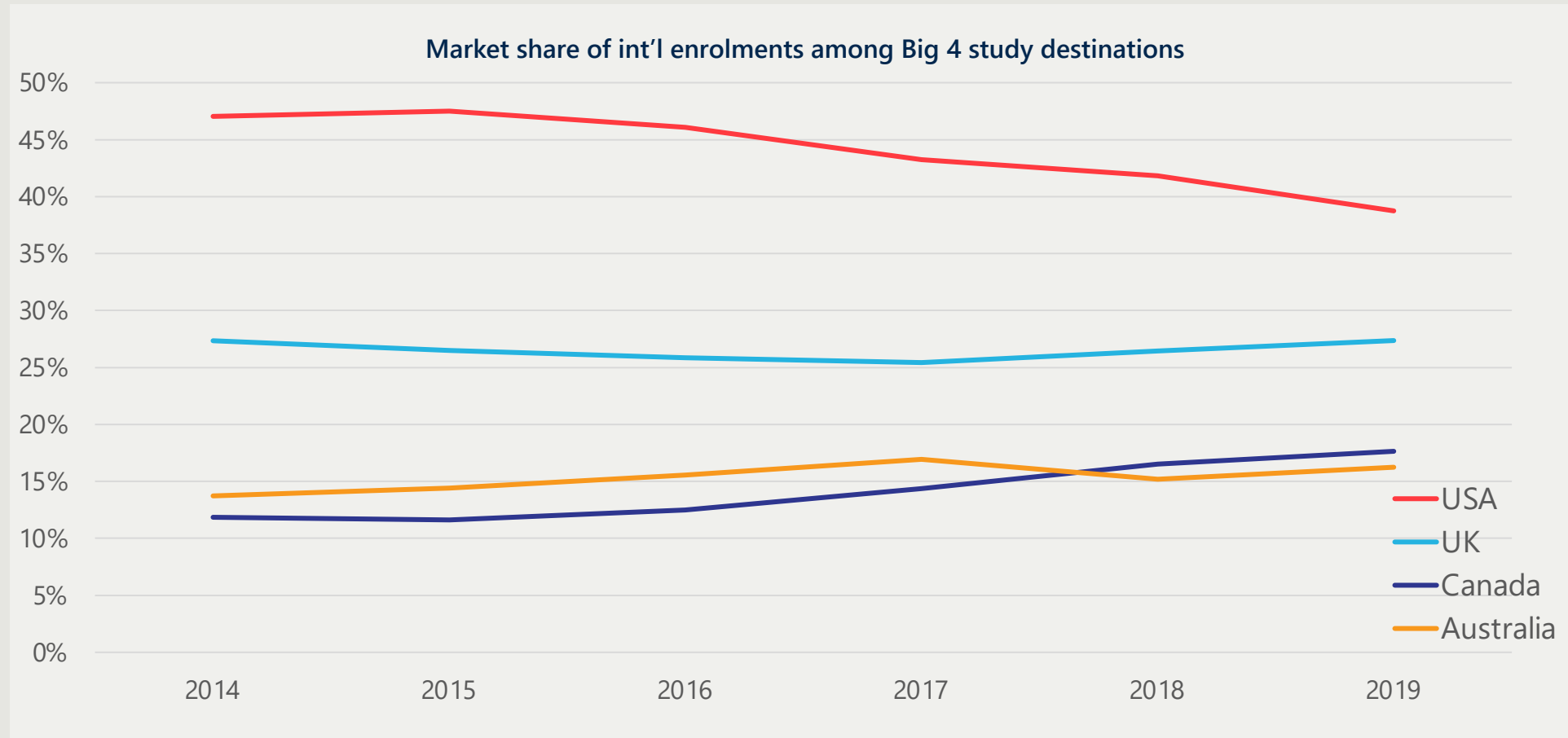
International student mobility update

Presented to UNIPOL

Matt Durnin | 24 March 2022

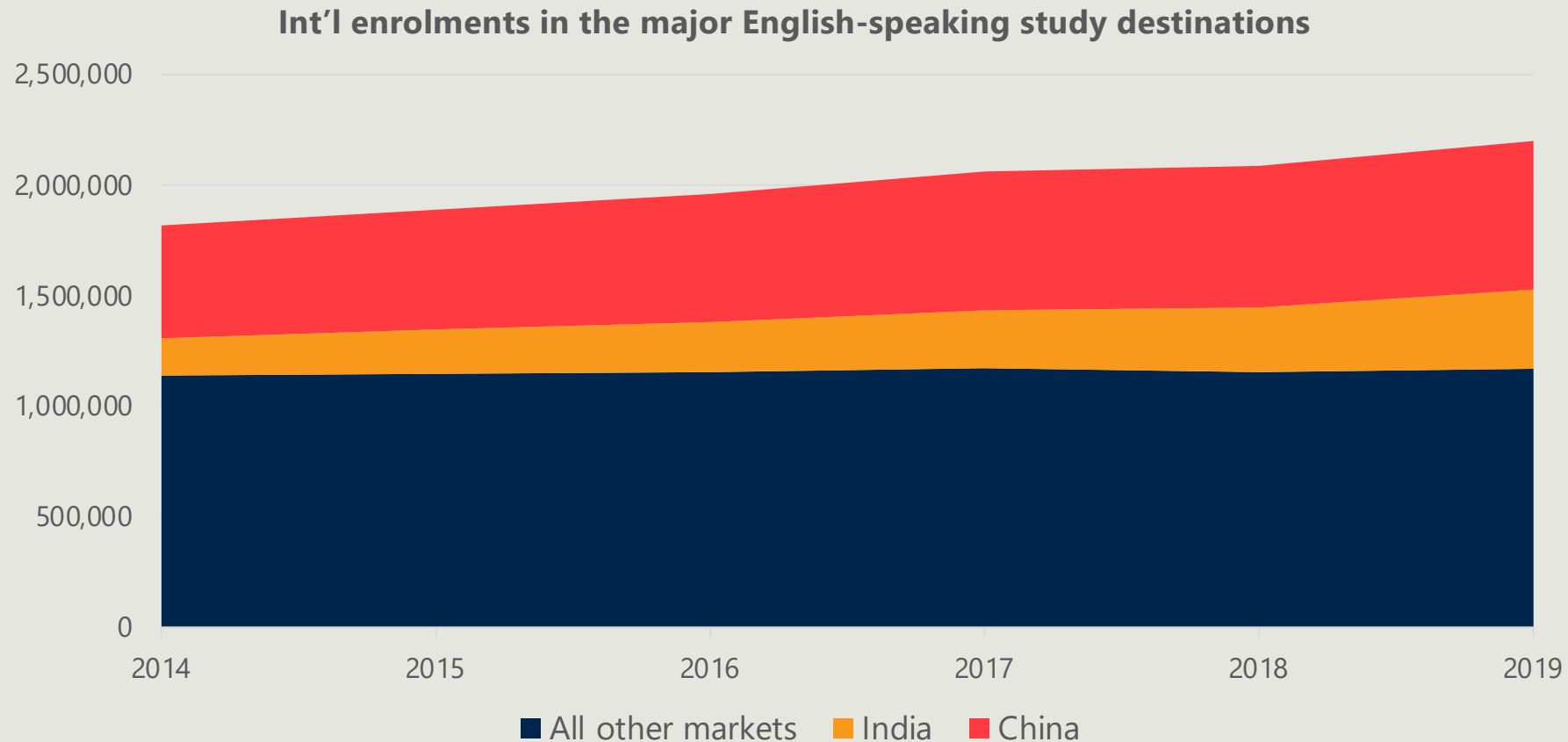
Before the pandemic

Market share amongst the Big 4 was shifting before the pandemic, mostly due to policy shifts



Sources: IIE Open Doors, HESA, HEIMS, StatCan

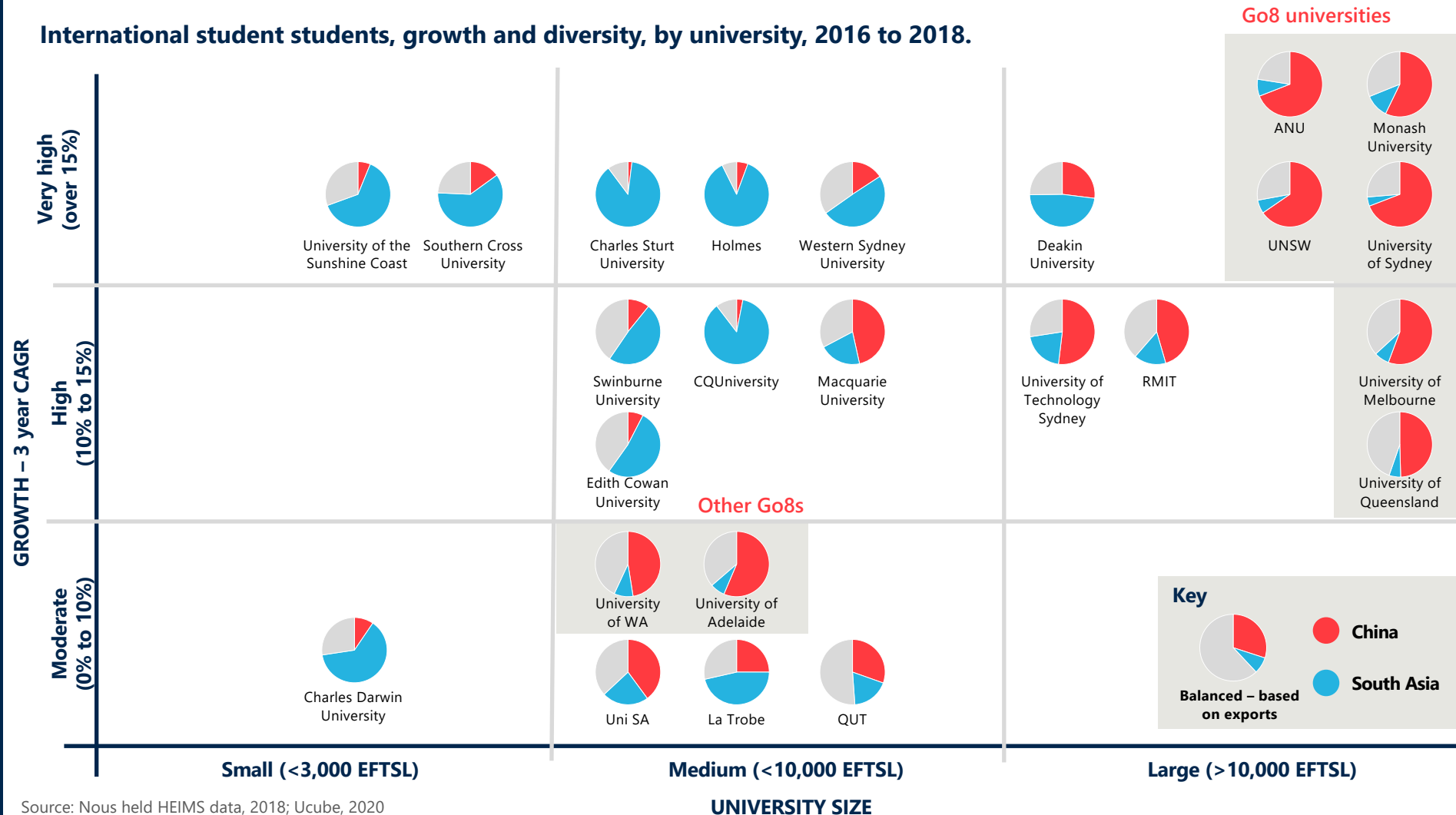
Int'l enrolment growth in the major study destinations has been overwhelming driven by China and India



Growth has been driven by the Chinese and Indian markets, which in turn has driven 'Chinese' and 'Indian' universities.

Universities that have grown significantly over the past two years (and indeed the five years prior to that) have been heavily reliant on either Indian student or Chinese students.

International student students, growth and diversity, by university, 2016 to 2018.

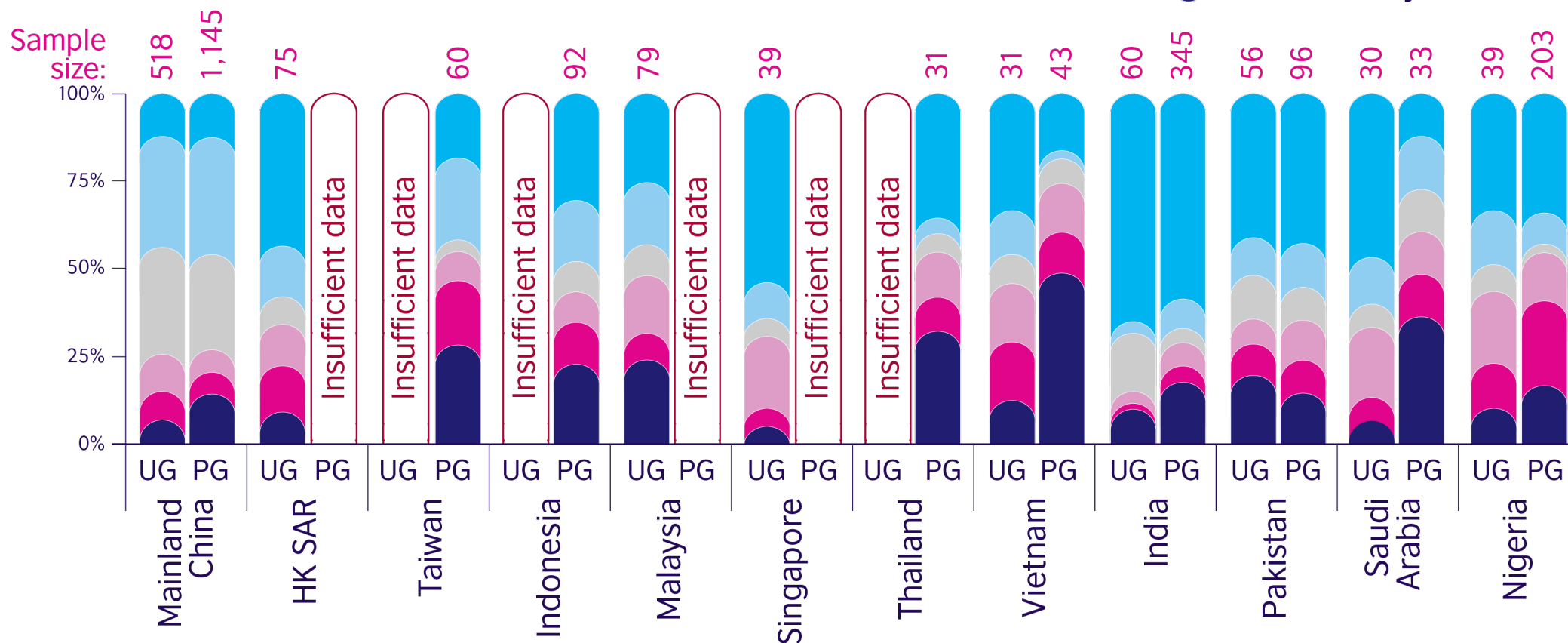


Source: Nous held HEIMS data, 2018; Ucube, 2020

Pandemic year 1

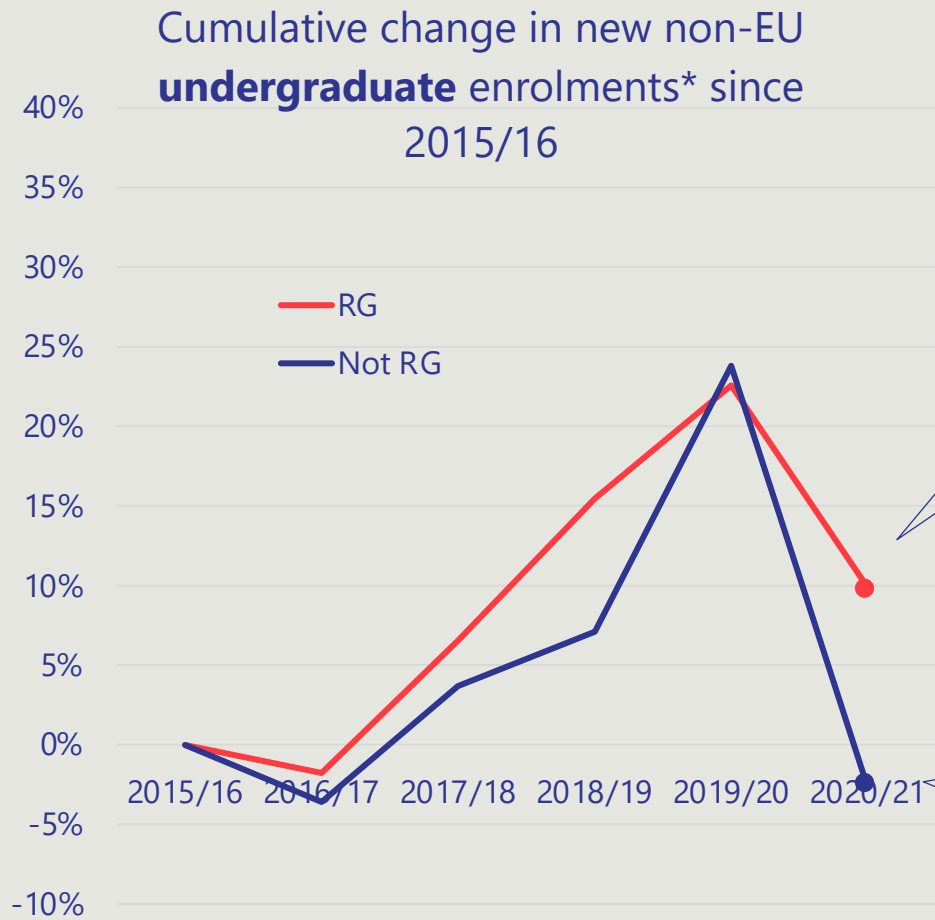
Q: How likely are you to cancel or delay your plans to study overseas for the 2020/2021 academic year?

- Not at all likely
- Somewhat unlikely
- Neither likely nor unlikely
- Somewhat likely
- Very likely
- I have already cancelled



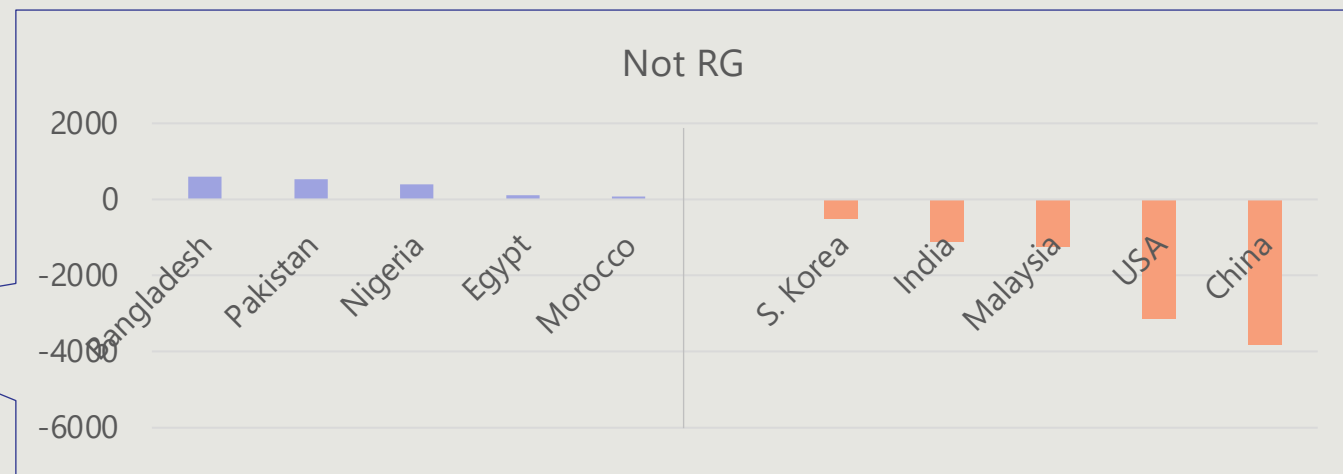
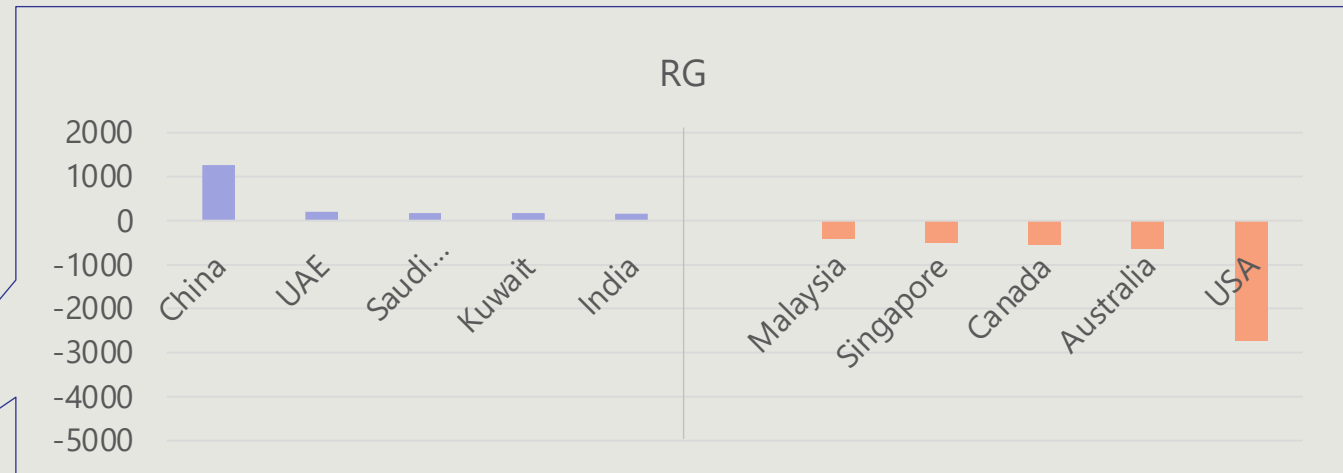
Source: British Council survey, August/ September 2020

RG institutions diverged from the rest of the sector in 2020



5 largest growth markets

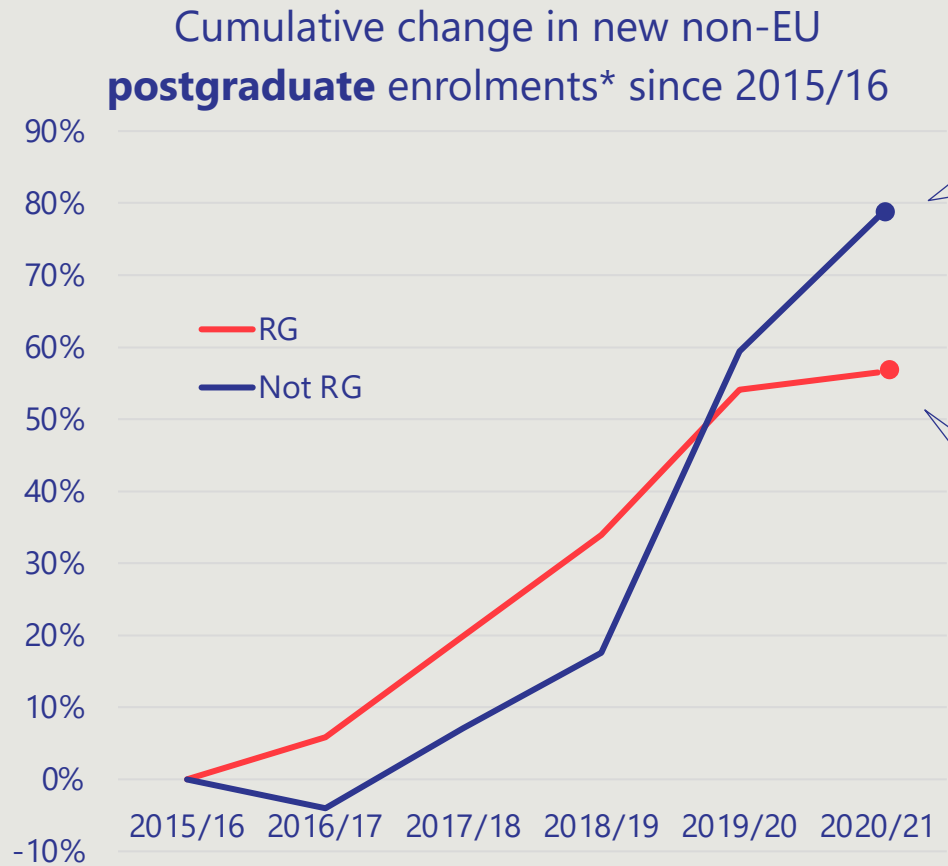
5 largest decline markets



*First year, full-time, non-EU international students

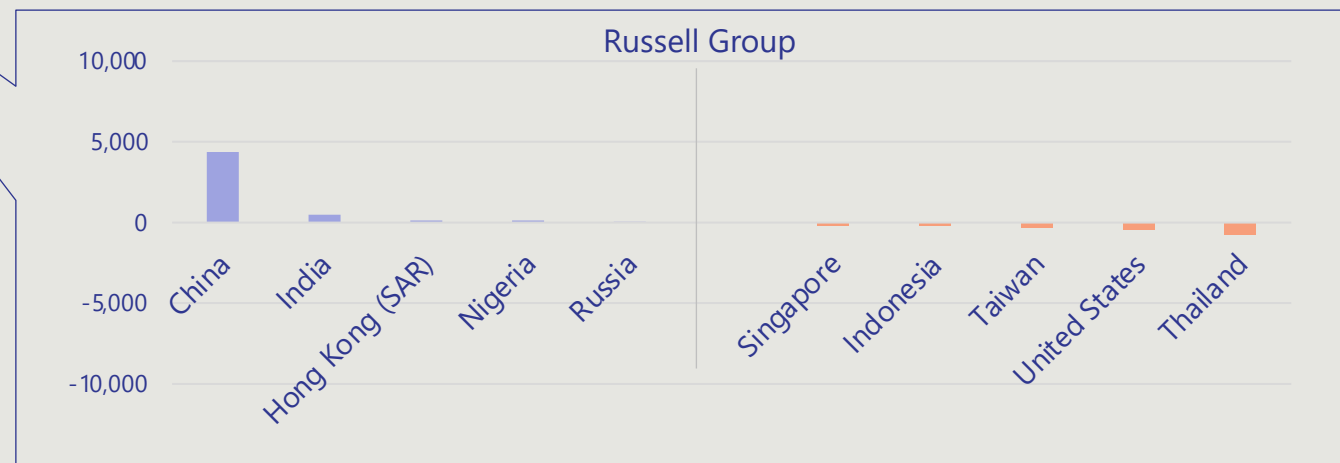
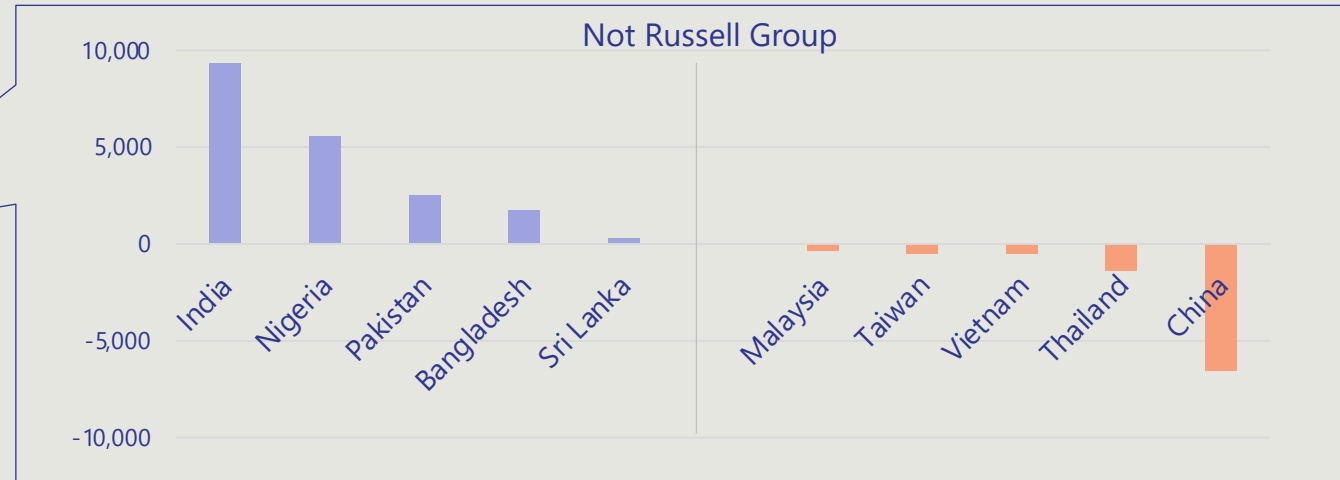
Source: HESA

RG institutions diverged from the rest of the sector in 2020



5 largest growth markets

5 largest decline markets



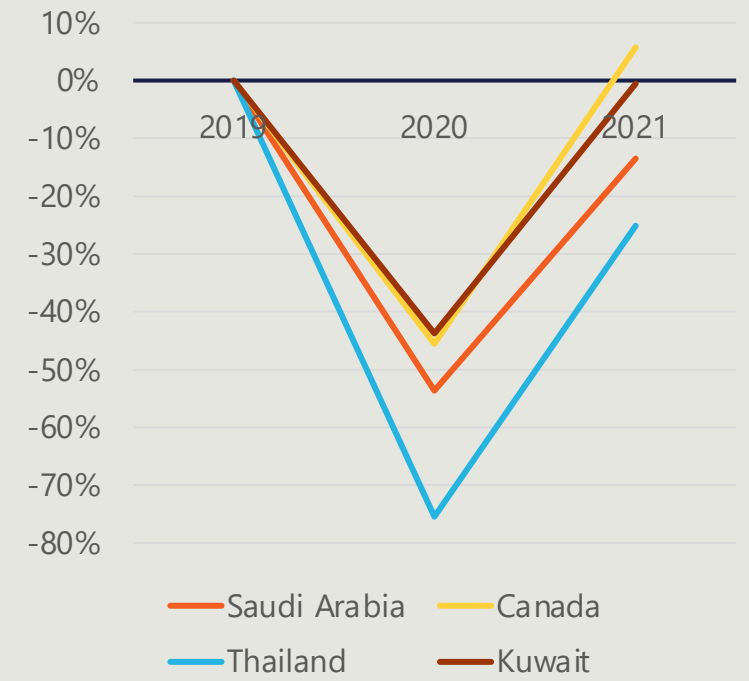
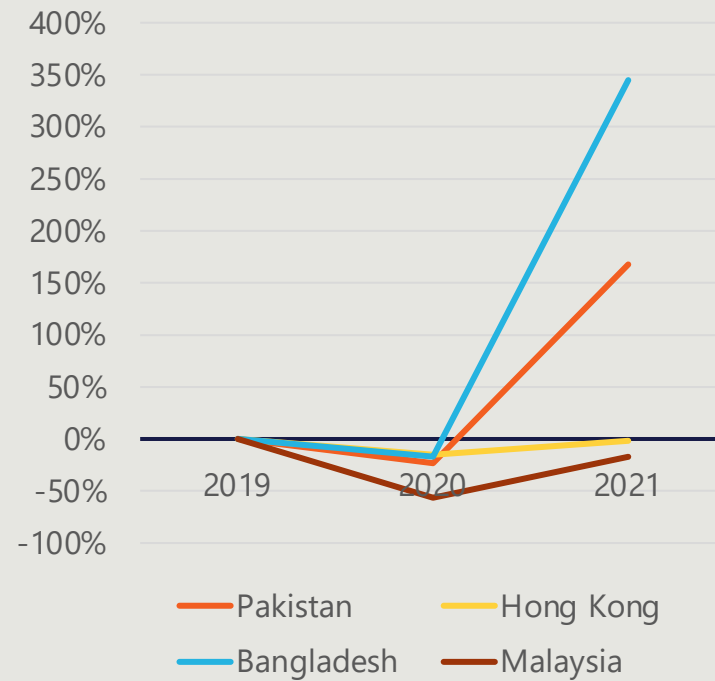
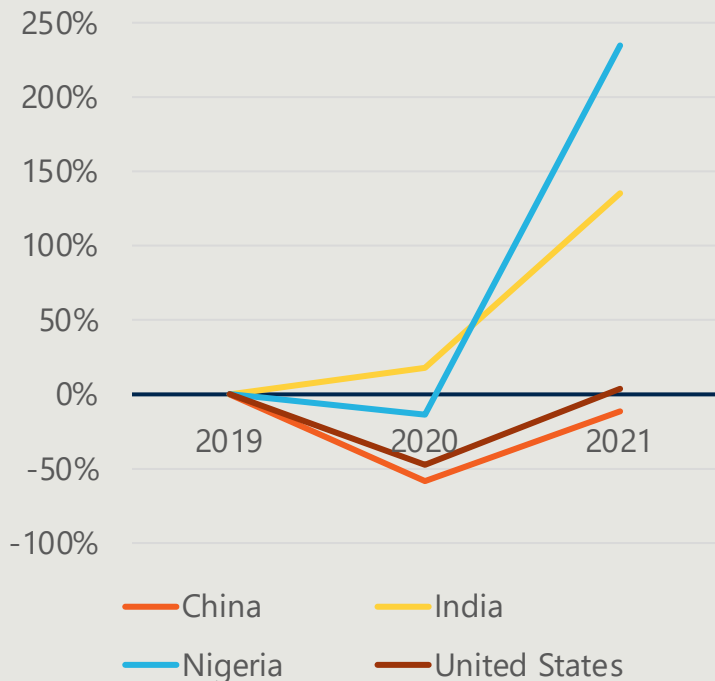
*First year, full-time, non-EU international students

Source: HESA

Pandemic year 2

Recoveries have been stronger in South Asia than other major markets

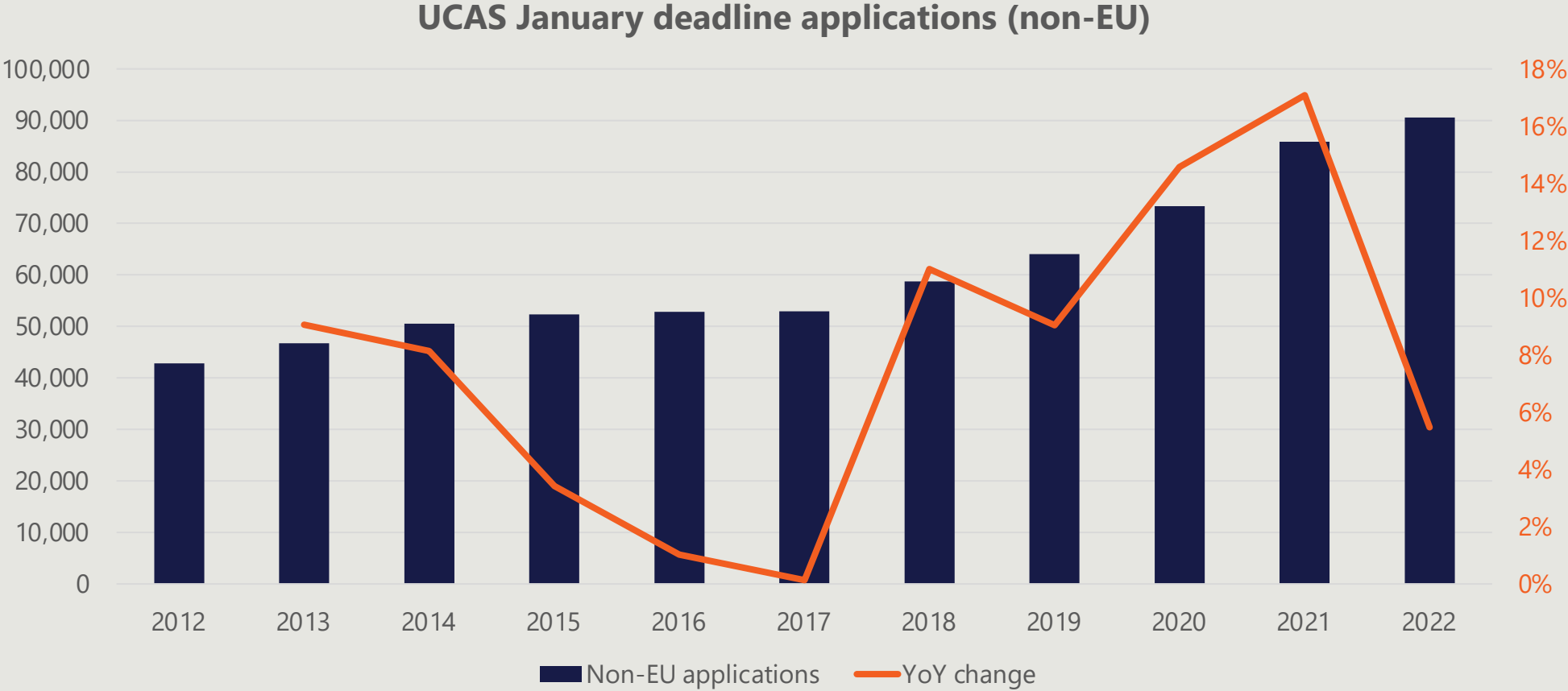
Cumulative change in UK study visa issuance since 2019



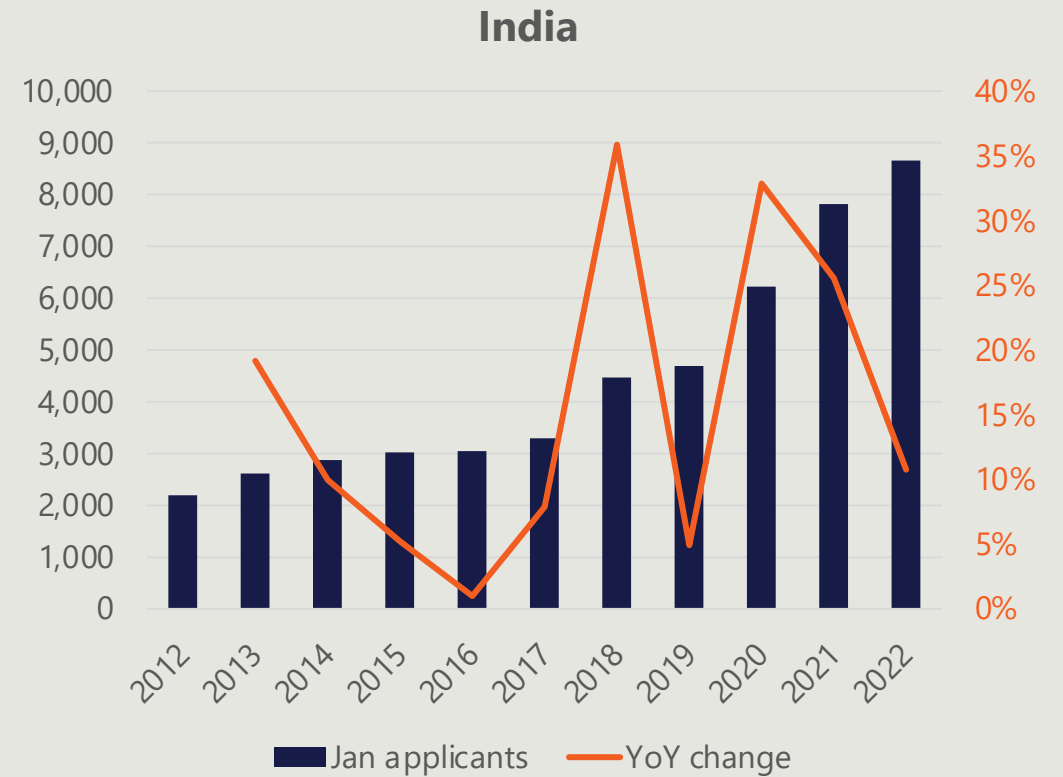
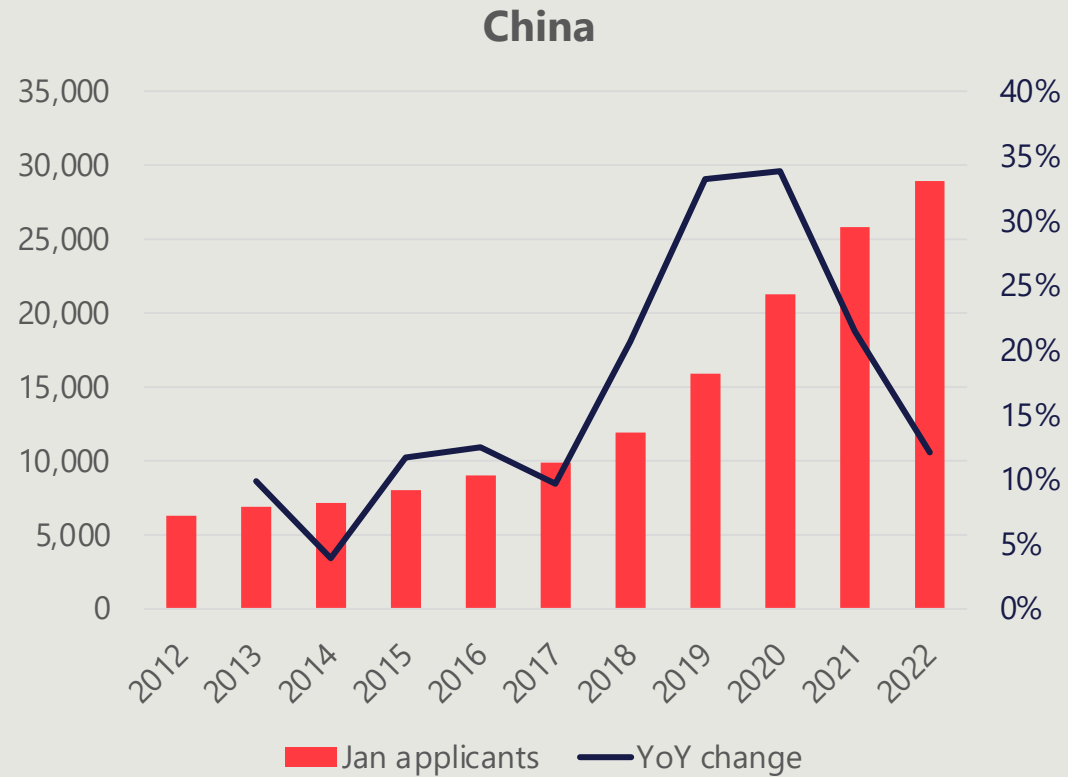
Source: HESA

Pandemic year 3

Jan. deadline apps are up, but not as much as expected

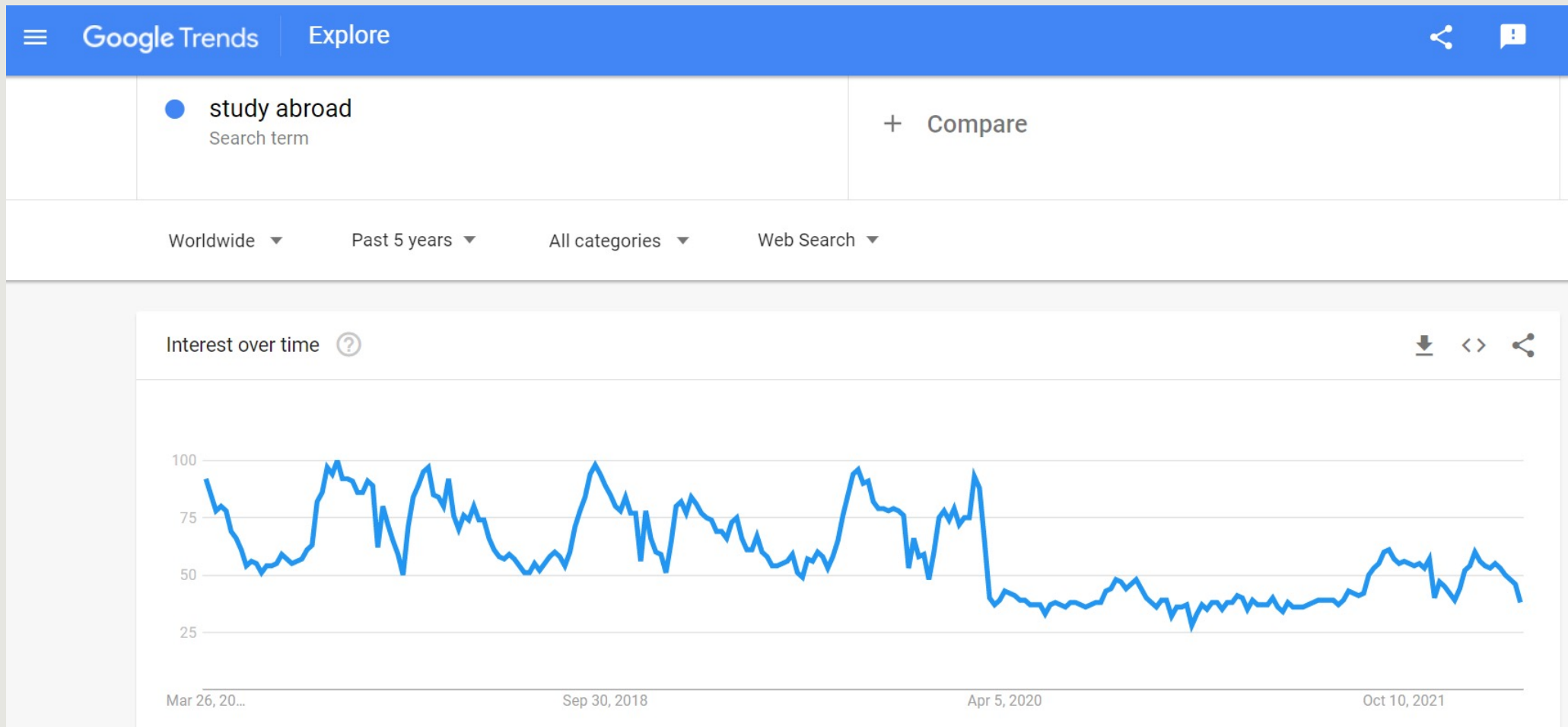


Our major volume markets show a similar trend



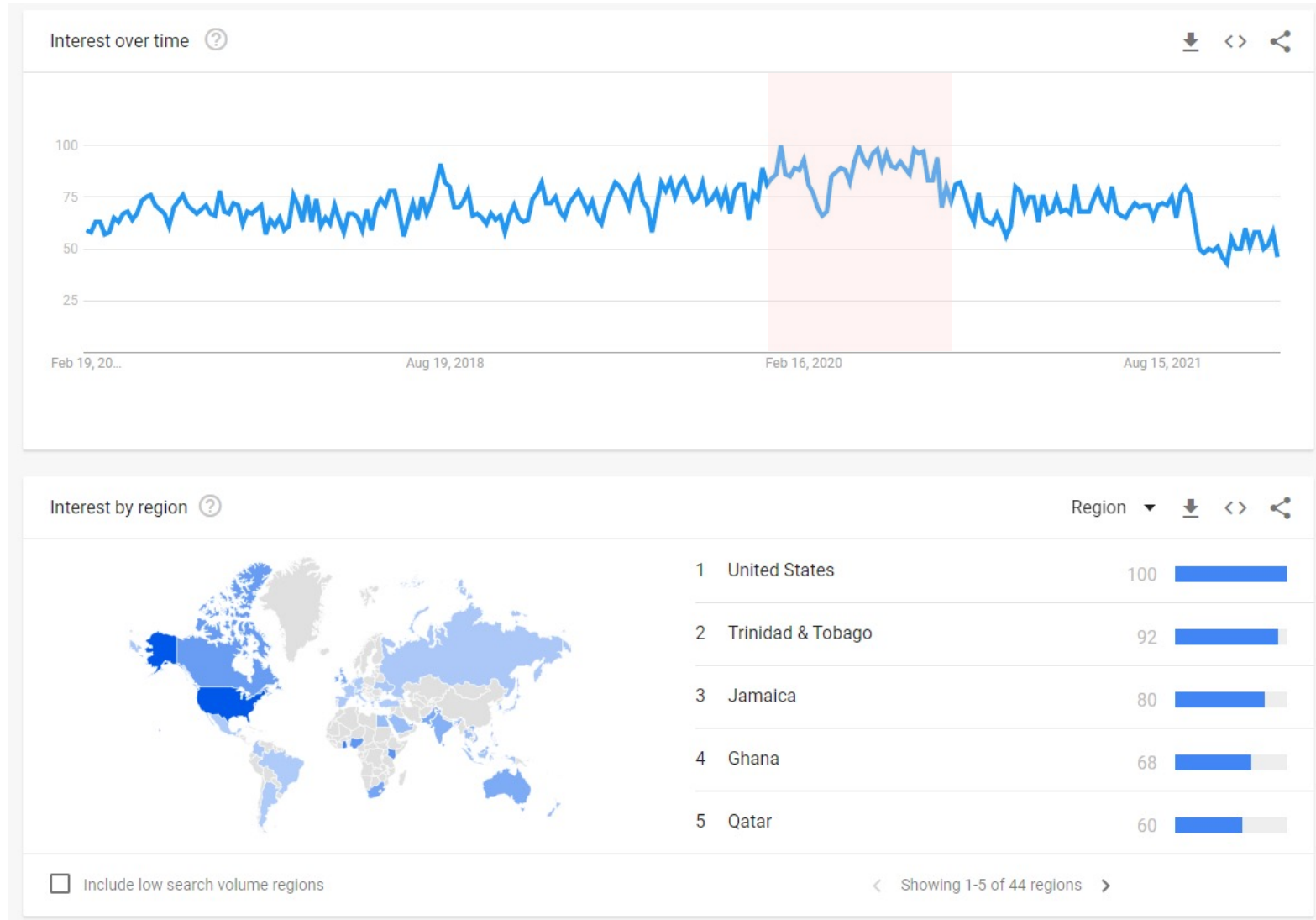
Source: UCAS

Search traffic for study abroad remains below pre-pandemic levels



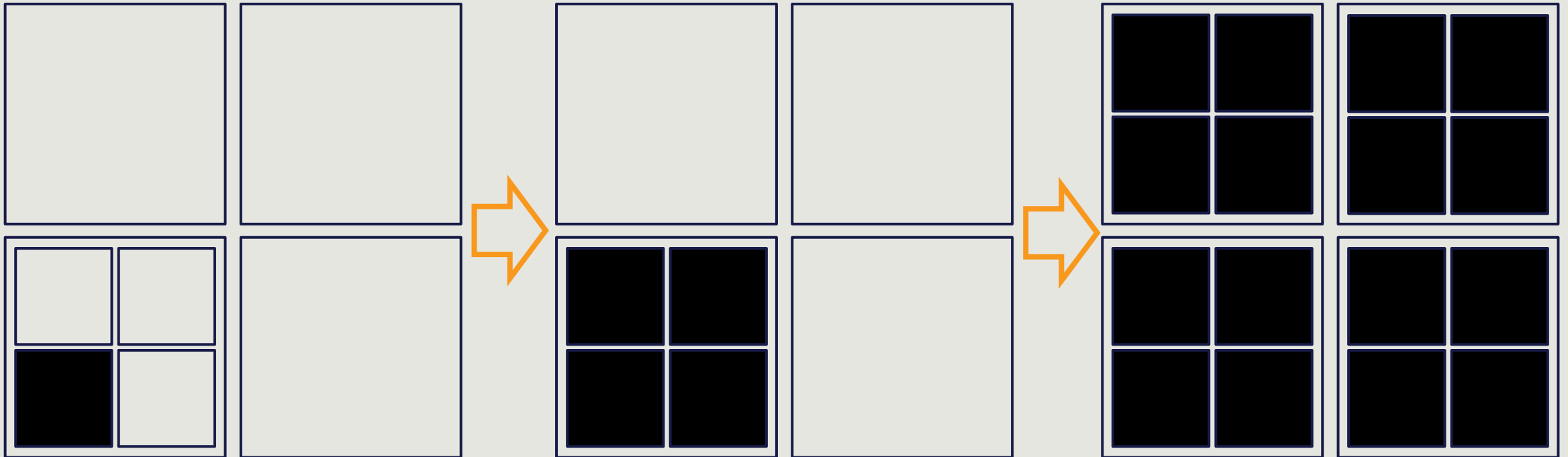
Beyond the pandemic: Digital revolution?

After a sustained surge in 2020, search intensity for 'online degree' has fallen off sharply



Source: Google Trends

Renormalisation groups: How minority preferences set standards for the majority



Two general conditions must exist for a small group to influence choice for a larger population

1. The **minority** population must be **intransigent** regarding its preference
2. The **majority** must be **flexible** in its preference

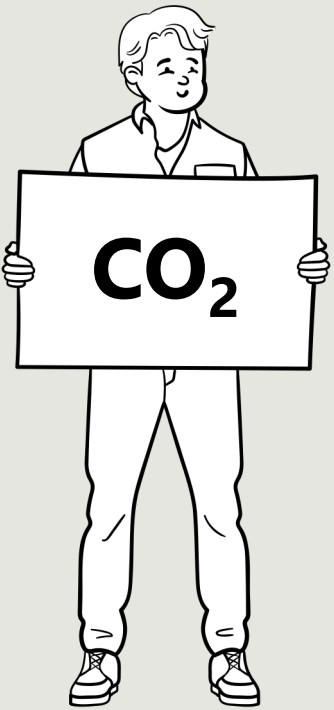
Example: Should you make manual or auto transmissions?



M	M	M	M	M	M	M	M	M	M
M	M	M	M	M	M	M	M	M	M
M	M	M	M	M	M	M	M	M	M
M	M	M	M	M	M	M	M	M	M
M	M	M	M	M	M	M	M	M	M
M	M	M	M	M	M	M	M	M	M
M	M	M	M	M	M	M	M	M	M
A	M	M	M	M	M	M	M	M	M
A	A	M	M	M	M	M	M	M	M
A	A	M	M	M	M	M	M	M	M



Digital delivery will prevail where minority preferences are strong and majority preferences are flexible



Key takeaways

- The recovery for the UK has been rapid so far and UK visa policies are attractive
- But competitors are back and applications data likely inflated
- Growth is shifting towards India, which is a very different proposition than China
- Online experiences are not highly rated by students, but they may nonetheless become a permanent fixture in HE

Thank you



About Nous

Nous Group is an international management consultancy operating across Canada, Australia and New Zealand, the UK and Ireland.

For over 20 years we have been partnering with leaders to shape world-class businesses, effective governments and empowered communities.

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PEOPLE

5

COUNTRIES