

## **Market Sentiment Towards the UK in light of Covid-19 – The perspective from East Asia markets**

### **Questions and Answers**

#### **Marketing and Promotion**

##### **What advice do you give to schools looking for September 2020 intake?**

We think a soft-sell approach is a good approach at the moment. Stories linked to student well-being and support for international students is all good messaging at the moment.

Universities may also look to leverage research stories (around Covid-19 or other topics of interest such as big data, AI etc) to maintain the UK's position of academic excellence.

Hopefully as we move into business resumption and business as usual, we can broaden promotional messages and start to leverage digital channels.

##### **If British Council events in Hong Kong won't be running until September will agents still run fairs in the summer?**

The Hong Kong government has just introduced social distancing guidelines limiting gatherings to a maximum of four people, and it is not yet clear for how long this measure will be in place. We are updating information for East Asian markets in terms of public events, school and university closures on our web portal, the last update can be found [here](#), and the next update will be published shortly.

## **IELTS**

**Updates on IELTS provision – please refer to [this page](#).**

**Is there any indication of when IELTS testing might resume in China?**

We hope to re-open in May, pending confirmation from the local authorities, and we have plans for a large expansion of testing, including testing through computer delivered IELTS (in test centres). Computer-delivered IELTS is exactly the same as paper-based IELTS, but on a computer. We will update on plans as soon as they are confirmed.

**Is there any suggestion that the regular academic IELTS may be accepted for UK colleges?**

This is mainly a question for the Home Office. However, we can reassure you that we will prioritise the UKVI tests once testing re-opens.

**In light of China's recent announcement that foreigners (including those with residence permits) will not be permitted to enter the country, could this have an impact on the ability of IELTS to source examiners or for international schools to resume F2F teaching?**

In terms of IELTS - good question. We are already planning for this scenario, including working with the Chinese authorities to enable the use of technology in examining. We will be update you as soon as we can, and certainly when we re-open testing in Mainland China.

## **Visas**

**Visa Questions – please refer to [UKVI](#)**

**If a student starts their course online from September 2020 followed by on campus face to face teaching in the UK. What is the guarantee that they will get the visa in January to join in term two?**

This would depend on the CAS issued by UK institution and if timing of VACs opening.

## **Student Recruitment**

**Has anyone been brave enough to put a figure to how much of a drop the UK is likely to see in international enrolments for September 2020?**

We believe that a significant proportion of students will already be looking to defer to next year, based on two factors:

1. Student concerns about their attainment in secondary examinations this year, meaning many will look to re-take exams next year

2. Indications from the UK that the crisis will last for a number of months, as suggested in media articles such as [this example](#).

Some agents have reported a significant decrease in enquiries. We are currently running a live survey to gauge sentiment, and we will share results with UK sector shortly.

**It seems students would still like to come if possible in September. Is that correct?**

We are seeing increasing evidence that students are taking a wait and see attitude or looking to defer overseas study for a year. We will continue to monitor market sentiment and keep the UK sector updated.

**Do you think a January intake would solve some issues?**

Our view is that anything that offers flexibility to students in this uncertain environment will be beneficial in terms of retaining students and your position in the market for new student recruitment.

**Any advice about sponsors not supporting online courses (where courses have gone partial online, including pre-session English)?**

Our understanding is that most countries are supportive of online learning at this point in time. For specific countries please get in touch with us and our in-country offices can find out more.

**Are you aware of any formal repatriation schemes operated by the Chinese Government to help Chinese students in the UK return home?**

No, we are not aware of any formal repatriation initiative.

**Is there any sense of the likelihood of students deciding to continue their studies in Asia, rather than overseas (as opposed to deferring)?**

We have not seen evidence of this yet, and our social media monitoring suggests that many parents and students are now taking a wait-and-see approach. We will continue to monitor market segment and provide updates to the sector on student decision making as insights come to light.

### **Programme Delivery**

**Online learning is not recognised by the Chinese Government - can I confirm that this relates only to full qualifications delivered online, not partial study? Is there a time limit as a proportion of the course for MoE recognition?**

Yes, this only refers to full qualifications online – a partial move to online given the circumstances shouldn't be a problem. For the MoE this is not about time limit - but

prioritising health and safety for the students. It should however be seen as a short-term measure during the Covid-19 pandemic.

It's also worth noting that we are seeing a shift to online delivery across the region in response to school and university closures, therefore online learning is becoming mainstream and increasingly accepted by students.

**Do students expect to pay a reduced tuition fee for an online programme vs face to face on campus?**

This is one of the questions we received from agents/counsellors. It is up to UK institutions to decide if that is a financially viable action to take.

**When do you think that we may move into the Business Resumption stage?**

A tricky question! We hope that once the UK is through the peak of the outbreak (which is currently forecast in 2-4 weeks or so) then we can move through to that stage. Our social media monitoring suggests students and parents are already moving from 'anxiety' to 'wait and see' which is a positive sign.