



INTERNATIONAL
EDUCATION
SERVICES

Post lockdown market insight – latest perspectives from Wider Europe

22 JUNE 2020

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Agenda for today

- **Covid-19 impacts on international student mobility – Wider Europe – Student survey results overview**
- **Country updates by British Council Country Directors**
- **Agent & College Counsellor Survey 2020**
- **Competitors updates**
- **Regional and country opportunities**
- **QA session**

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Respondent profile

- A survey on overseas study plans in the context of the COVID-19 epidemic was distributed through British Council and agent channels across different countries and regions. There were a total of 1,819 respondents from the Wider Europe (non-EU) region: 1,316 from Turkey, 357 in Kazakhstan or Uzbekistan, and 146 in Russia.
- 168 of these respondents were already studying abroad, while 366 had applied to study overseas this year. Others had plans for overseas study but had not applied to go abroad in 2020.
- 40 per cent of the 168 overseas students were in the UK and 52 per cent of the 366 applicants had applied there. PG students made up 57 per cent of total applicants.

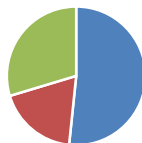
Overseas students, by country of study



■ UK ■ Non-UK

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Applicants, by country of application



■ UK only ■ UK & Others ■ Others

Applicants, by intended level of study



■ UG ■ PG ■ Others

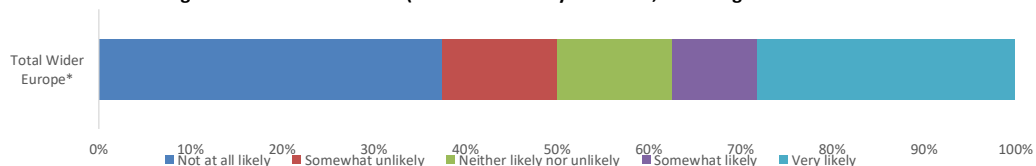
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Current overseas students' plans to continue

- A large proportion of respondents from countries in Wider Europe who were currently studying in the UK said that they were likely to abandon their overseas study. Among those whose course was not due to end this term, 38 per cent said they were "not at all likely" to continue their studies overseas, compared to 28 per cent who described themselves as "very likely" to continue. The remaining third were still undecided.
- It should be noted that the number of respondents meeting these criteria was very low (only 38 respondents across the whole region) so it is difficult to draw strong conclusions here.

Likelihood of continuing current overseas course (students currently in the UK, excluding those whose course will end this term)



* "Total Wider Europe" refers to the respondents from all four target countries in the region (Kazakhstan, Uzbekistan, Turkey and Russia). The number of respondents currently studying in the UK was too low to give reliable figures for individual countries.

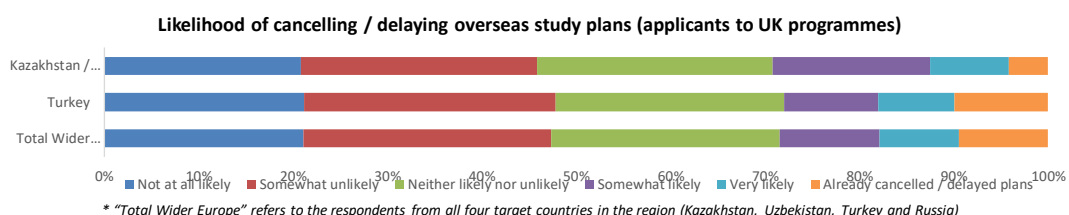
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Applicants' likelihood of cancelling / delaying overseas study plans

- Around 18 per cent of respondents from the four target Wider European countries said that they were very likely to cancel their overseas study plans or had already done so, while around 21 per cent said that they were not at all likely to do this. Most respondents – over 60 per cent of the total – were still undecided.
- Prospective undergraduates in the region were significantly less likely to be planning to cancel their overseas study plans compared to postgraduates.
- The regional analysis below excludes Russia as the survey had few UK applicants from that country



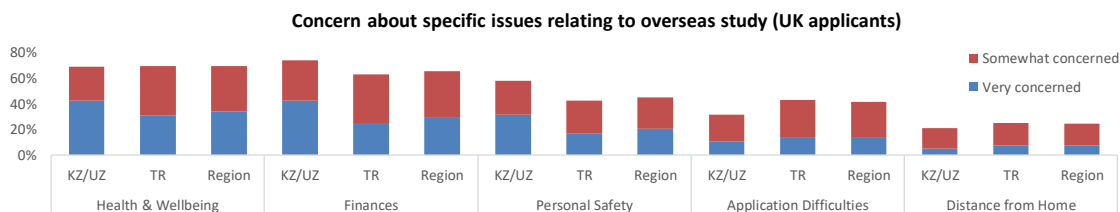
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UK applicants' attitudes towards specific issues

- Survey results show that applicants from both Kazakhstan / Uzbekistan and Turkey see health and wellbeing as the most important concern, followed by finances; this is a common trend worldwide. As noted on the previous slide, there were not enough applicants from Russia to draw strong conclusions about this group but they are included in the regional total.
- Application difficulties were also a concern for some students but trailed a long way behind finances and health/safety, while distance from home is not a major concern for most students.



* "Region" refers to the respondents from all four target countries in the region (Kazakhstan, Uzbekistan, Turkey and Russia)

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UK applicants' preferences if unable to go abroad

- Respondents were asked what they would prefer to do if unable to start their overseas course in September. Around a third of UK applicants from the region would prefer to start online, while almost all the rest would delay their study. Following the trend in other regions, an online start would be substantially more popular among undergraduates (41 per cent) than postgraduates (25 per cent), and also appears to be particularly unpopular in Kazakhstan and Uzbekistan.
- Among applicants who would prefer to delay the course, a January start would be much more popular than waiting until September across all countries with reasonable sample sizes.

UG applicants

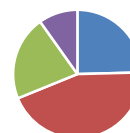


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Preference if unable to start course abroad in September

- Start online in autumn, with face-to-face start in January
- Delay course start until January
- Defer my offer until autumn 2021
- Cancel my plans to study overseas

PG applicants



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Surge of education and video apps in Wider Europe

Russia

1. Gradient: DNA Ancestry AI Test
Free - Ticket To The Moon, Inc.
2. Spiral Roll
Free - Voodoo
3. ZOOM Cloud Meetings
Free - Zoom
4. Easy Game - Brain Test
Free - Easybrain
5. TikTok - Make Your Day
Free - TIKTok Inc.
6. Telegram Messenger
Free - Telegram FZ-LLC
7. WhatsApp Messenger
Free - WhatsApp Inc.
8. Perfect Cream
Free - Playgendary Limited
9. Skype for iPhone
Free - Skype Communications S.a.r.l
10. Instagram
Free - Instagram, Inc.

Kazakhstan

1. Gradient: DNA Ancestry AI Test
Free - Ticket To The Moon, Inc.
2. ZOOM Cloud Meetings
Free - Zoom
3. Google Classroom
Free - Google LLC
4. Skype for iPhone
Free - Skype Communications S.a.r.l
5. Telegram Messenger
Free - Telegram FZ-LLC
6. Email App - Mail.ru
Free - Mail.Ru
7. TikTok - Make Your Day
Free - TIKTok Inc.
8. WhatsApp Messenger
Free - WhatsApp Inc.
9. Microsoft Teams
Free - Microsoft Corporation
10. Instagram
Free - Instagram, Inc.

Turkey

1. EBA
Free - EBA
2. Gradient: DNA Ancestry AI Test
Free - Ticket To The Moon, Inc.
3. Telegram Messenger
Free - Telegram FZ-LLC
4. Twitter
Free - Twitter, Inc.
5. Brain Test: Tricky Puzzles
Free - Unico Studio LLC
6. Netflix
Free - Netflix, Inc.
7. Spiral Roll
Free - Voodoo
8. Tempo Player - Offline Cloud
Free - Uzunobeli Telekomunikasyon
9. John Clash
Free - Freemlay Inc.
10. Migres Sanal Market
Free - Migres Ticaret A.S.
11. ZOOM Cloud Meetings
Free - Zoom

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RUSSIA

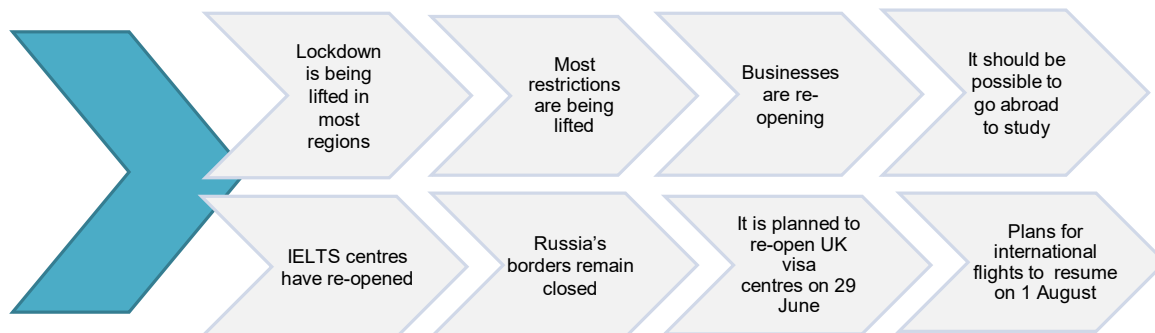
Michael Bird – Country Director
Daria Lavrentieva – Projects Manager

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Russia: Covid-19 update

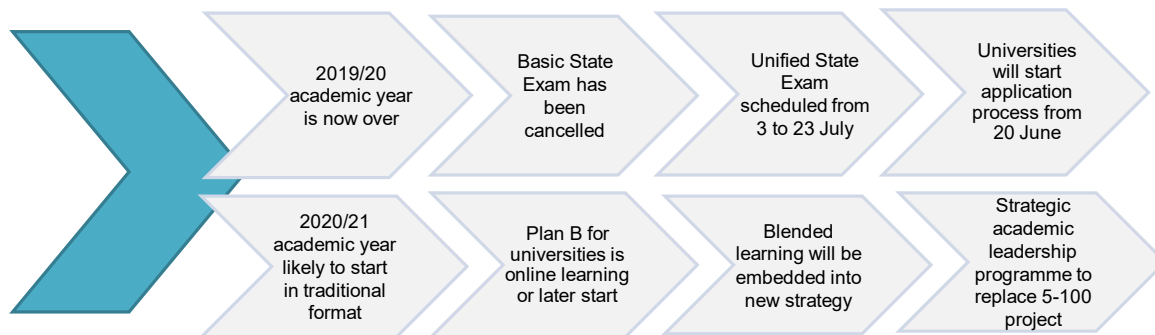


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Russia: Education update



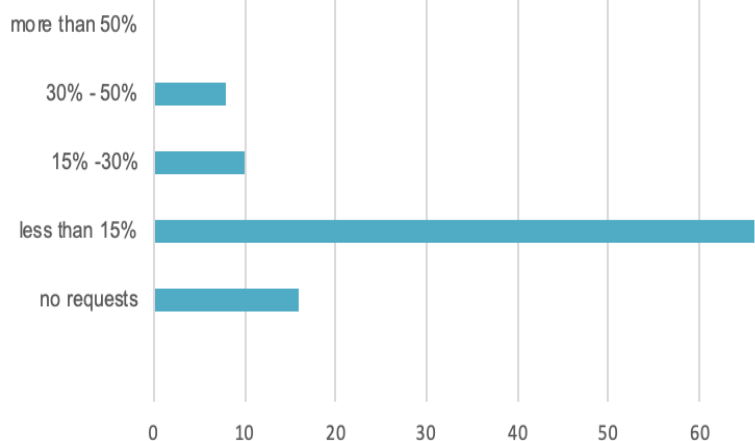
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Russia: Insights from agents and IB schools

Academic programmes deferrals requests for 2020/21 (%)



82% of students eager to start in September

18% of students undecided

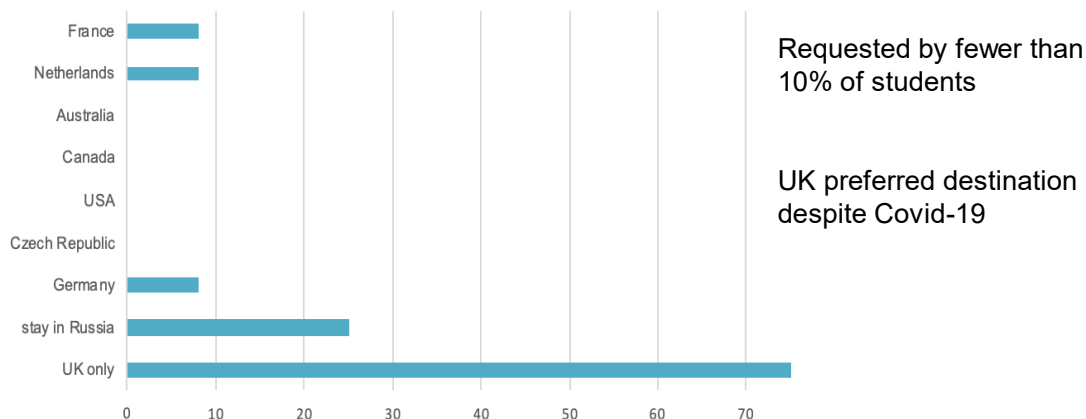
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Russia: Insights from agents and IB schools

Requests about changing destination (%)



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Russia: Insights from agents and IB schools

- Approximately 20% of students still deciding, most concerns are about fees
- More clarity needed for students and parents to take decisions
- Post-study work visa is now main selling point
- IB schools report majority of students don't plan to change from UK to another country or to defer until next year



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Russia: Insights from agents and IB schools

Top 5 preferences for 2020/21

- 1 – Information Technology
- 2 – Business and Management
- 3 – Creative Arts and Design
- 4 – Engineering and Technology
- 5 – Social Sciences

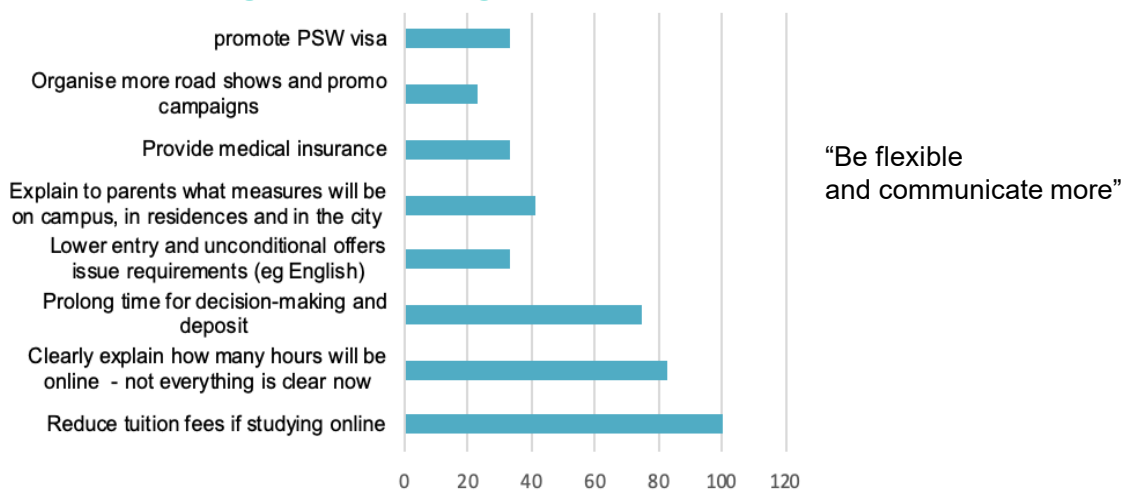


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Russia: Insights from agents - recommendations



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Russia: Opportunities

Profile-raising

- Subject-focused digital campaigns
- Partnerships with relevant media
- Bespoke digital packages
- Online workshops for schools etc

Enhancing partnerships:

- Boosting contacts with agents from different cities
- Enhancing TNE partnerships and exploring collaborations

F2F events in Q4 (February-March)

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TURKEY

Cherry Gough – Country Director
Semra Yalcin Dogan – IES Manager

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Agent & College Counsellor Survey 2020

Turkish students are highly motivated but concerned around

- Travel restrictions and visa
- Economic situation
- Health and safety
- *Most of our students are keen to go to the UK for the start of their studies in the autumn.*
- *Cautiously optimistic*

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Agent/Counsellor concerns

- Flexibility on admission criteria
- Financial situation
- Brexit + Covid-19 effect on international student recruitment strategy
- Plans for the new academic year
- High rate of Covid-19 cases – students' safety & accommodation
- Clear communication about teaching model
- Visa: process time and foreseen health checks for visa purposes
- Gap year or study in Turkey and continue in the UK
- Preps for 11th graders
- Post study work



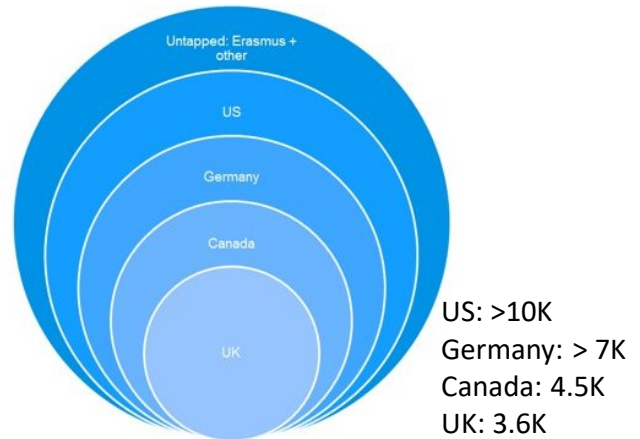
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Competitors

- Active and present
- Study preparations are ongoing
- Blended learning
- Resumption of visa services is unknown
- U.S. to lose market share
- Canada and Germany stand out



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Opportunities

Webinars

Broadcast on
social media

Virtual tours

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KAZAKHSTAN

Rowan Kennedy – Country Director
Zhanaidar Duzgenbay – IES Coordinator

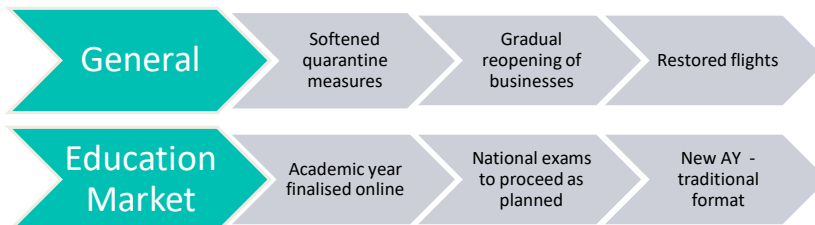
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Quick Look at Covid-19 in Kazakhstan



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Important policy updates on education

- **Modernisation of the Bolashaq programme**
- **Transition to 12-year education by 2021**
- **Priority to increase spending on research by 2025**
- **E-learning to become govt. approved method**
- **Study in Kazakhstan brand & Education hub in Central Asia**

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Agent & College Counsellor Survey 2020

Low numbers of intl. students driven by:

- **Uncertainty around Covid-19**
- **Meeting deadlines**
- **Quality of online education**
- **Economic reasons**

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Agent/Counsellor concerns



- Visa processes (deadlines, simplifications, etc.)
- International exams
- Extended deadlines
- Financial aid (scholarships / discounts)
- Clear messaging
- Safety measures
- Late start
- Post-study work visa
- Changes to online application to a university
- Online foundation and A-Levels

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Competitors & activities

<ul style="list-style-type: none"> • No f2f events • Live talks with students • Virtual fairs • Consistent updates on Covid-19 	<ul style="list-style-type: none"> • No f2f events • Updates on Covid-19 • Virtual fairs 	<ul style="list-style-type: none"> • High market interest • Communication with students • Meetings and talks with students 	<ul style="list-style-type: none"> • No f2f events • High market interest 	<ul style="list-style-type: none"> • Government led live events • High market interest • No virtual/f2f fairs • Strong ties with agents
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Opportunities



Webinars



Online meetings



Virtual tours

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UZBEKISTAN

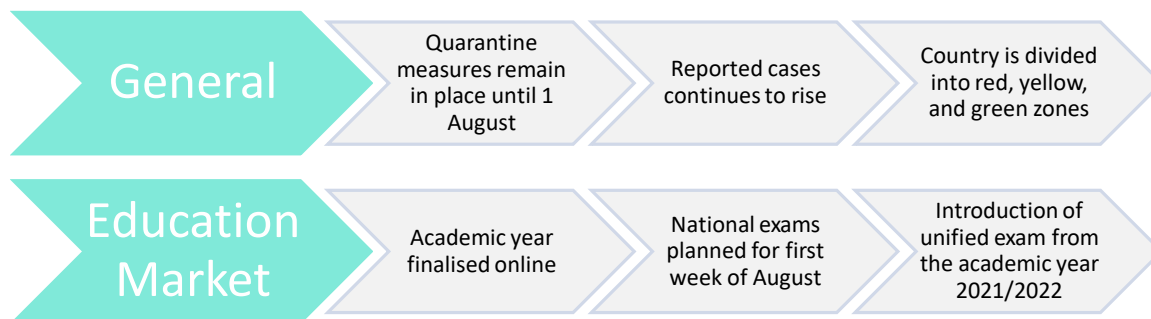
Rachel Ireland – Country Director
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Quick Look at Covid-19 in Uzbekistan



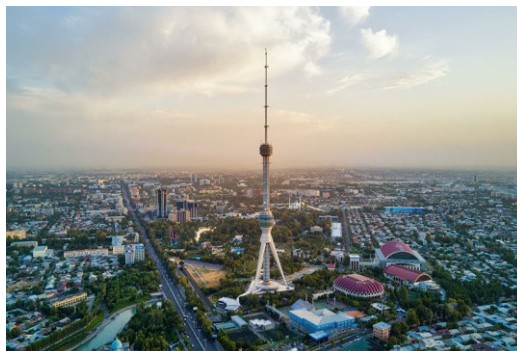
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General situation in country and policy level developments

- **Economic picture**
- **Reforms:** scale, focus, impact
- **Investments:** GoU, international agencies, private
- **Opportunities:** TNE, products and services



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Agent & College Counsellor Survey 2020

High numbers of intl. students driven by:

- Local Access
- Russia and CIS
- Comparable costs
- Availability of the options

Agent/Counsellor concerns:

- Visa processes (deadlines, simplifications, etc.)
- International exams
- Extended deadlines
- Financial aid (scholarships / discounts)
- Clear messaging
- Safety measures
- Late start
- Post-study work visa
- Changes to online application to a university
- Online foundation and A-Levels

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Competitors

UZB

- Increasing quality of local education provision
- Growth in number and quality of TNE programmes

US

- No f2f events, Live talks with students, Virtual fairs, Consistent updates on Covid-19
- Strong focus on technology and other STEM related subjects
- Scholarships and funding available
- Both tuition fees and living costs are expensive
- Current anti-immigration rhetoric

Study in Europe

- Strong digital campaign, High market interest, Strong ties with agents
- Scholarships and funding available
- Comparatively low cost

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UZBEKISTAN: Opportunities

Profile-rising:

- Implementing subject-focused digital campaigns
- Webinars, Virtual meetings and tours
- Bespoke digital packages
- Online workshops for schools etc

Enhancing partnerships:

- Boosting contacts with agents from different cities
- Enhancing of TNE partnerships and discussion of collaborations
- Virtual Policy Dialogue events



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Questions and answers

The recording of the webinar will be distributed to all registrants shortly.

If you have any further questions please contact:

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