



NAFSA Market Briefing for UK institutions

Brown Palace Hotel
Denver, CO
Monday, 29 May 2016

SERVICES FOR
INTERNATIONAL
EDUCATION
MARKETING

NAFSA Market Briefing

Time	Description
8:30 - 9:00	Registration & Breakfast
9:00 - 9:05	Welcome
9:05 - 9:35	US Policy Updates
9:35 - 10:15	Higher Education in the United States and Colorado
10:15 - 10:30	Coffee break
10:30-10:45	US Market Updates
10:00-11:15	Americas Updates
11:15 - 11:45	Education Intelligence
11:45 - 11:50	UK Visa and Immigration
11:50 - 12:00	British Council USA Updates UK presence at NAFSA

United States Policy Updates

Tamsin Thomas

Higher Education Manager
British Council USA

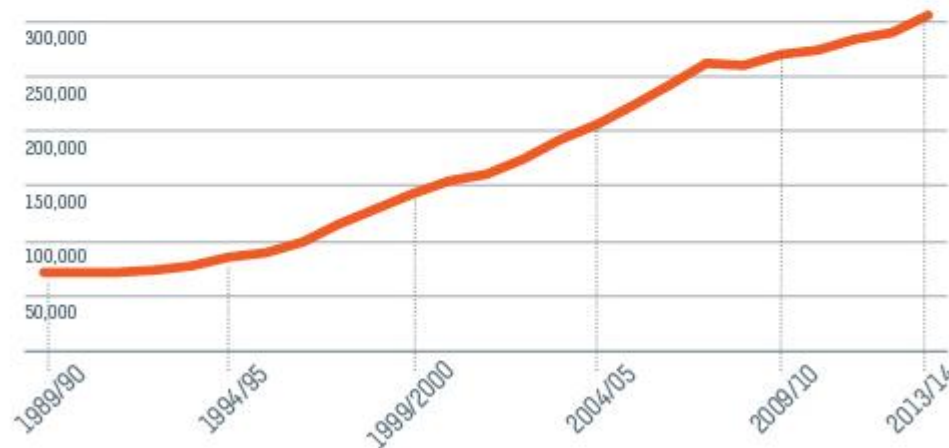
Gina Del Tito

Program Coordinator, Education and Society
British Council USA

A QUICK LOOK AT U.S. Students Studying Abroad

304,467 U.S. students
studied abroad for academic credit in 2013/14.

U.S. STUDY ABROAD STUDENTS 1989/90 – 2013/14



In 2013/14 there was **an increase of 5%** over the prior year in the number of U.S. students studying abroad.

TOP FIVE MAJOR FIELDS OF STUDY OF U.S. STUDY ABROAD STUDENTS



STEM Fields
23%



Business
20%



Social Sciences
19%

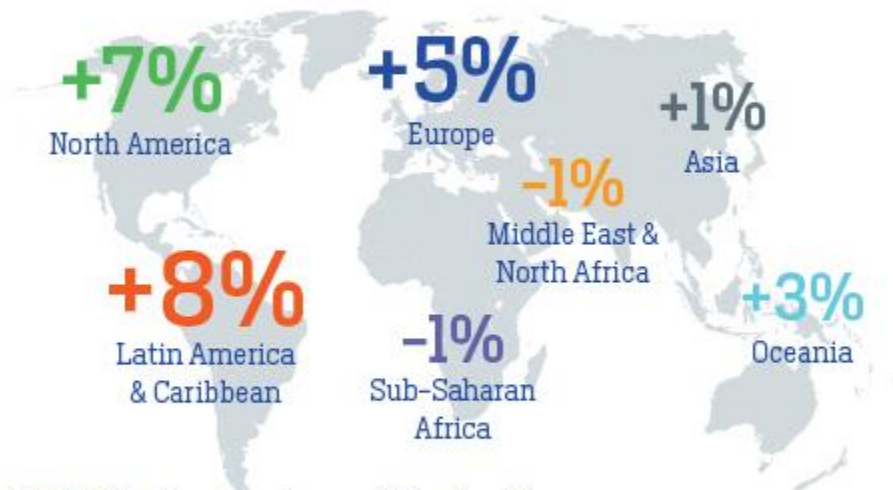


Foreign Language &
International Studies
8%



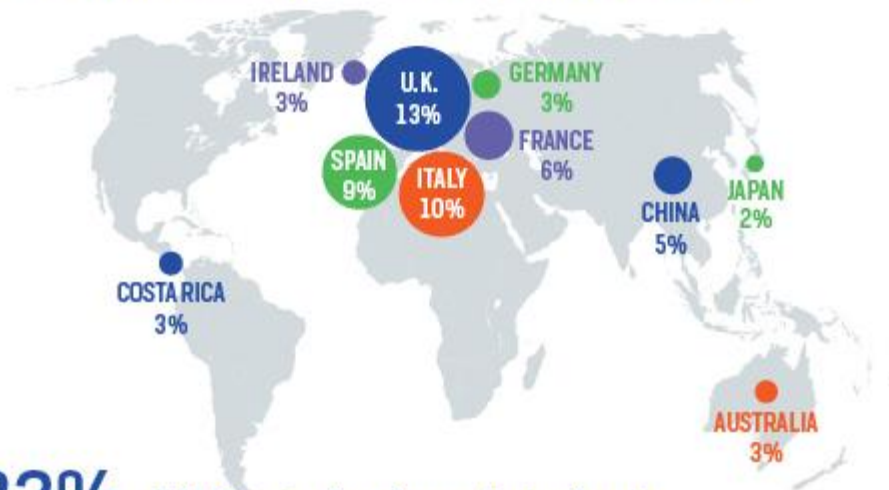
Fine or
Applied Arts
7%

GROWTH IN HOST REGIONS OF U.S. STUDY ABROAD STUDENTS



In 2013/14 Latin America and the Caribbean was the fastest growing region for U.S. study abroad.

TOP TEN DESTINATIONS FOR U.S. STUDY ABROAD STUDENTS



32% of U.S. study abroad students are hosted by the United Kingdom, Italy, and Spain.

UNDERGRADUATE PARTICIPATION IN U.S. STUDY ABROAD



1 in 10 U.S. undergraduates studies abroad before graduating.

DURATION OF U.S. STUDY ABROAD

62%
short-term

summer or up to eight weeks

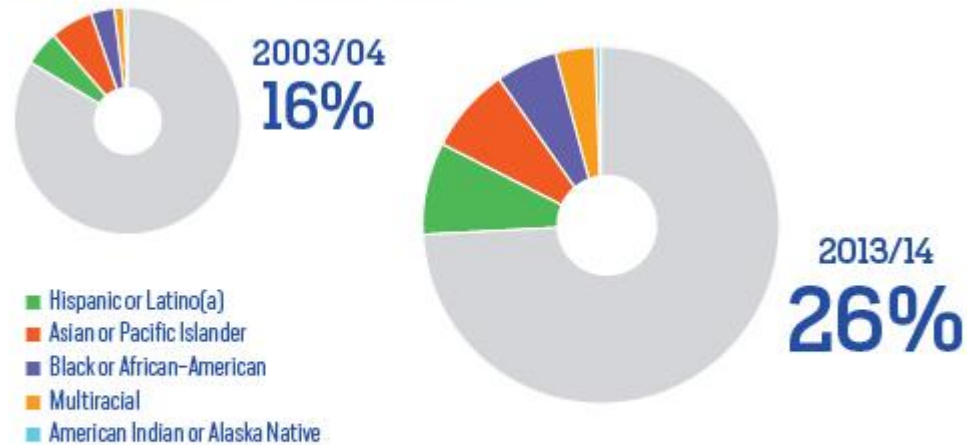
35%
mid-length

one-two quarters/ one semester

3%
long-term

academic or calendar year

RACE/ETHNICITY OF U.S. STUDENTS ABROAD



The proportion of U.S. minority students studying abroad has increased modestly over the past ten years.

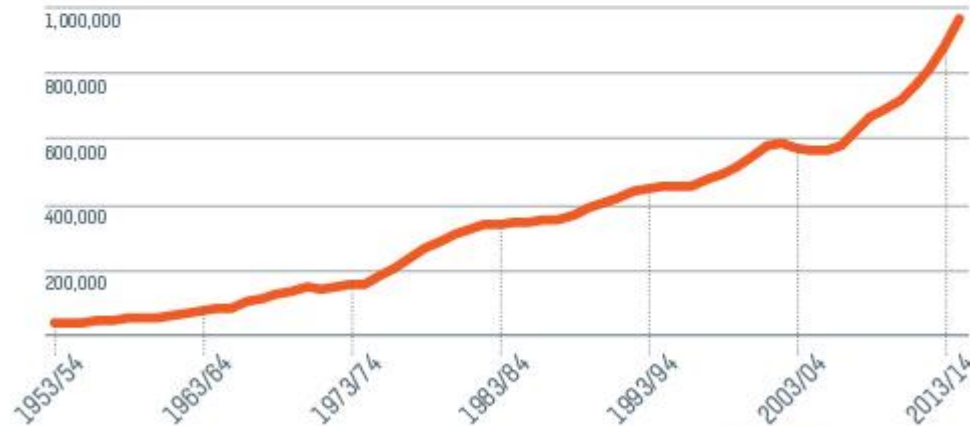
THE INSTITUTE OF INTERNATIONAL EDUCATION (IIE) has conducted an annual census of international students in the U.S. since its founding in 1919. Known as the *Open Doors Report* since 1954, and supported by the Bureau of Educational and Cultural Affairs of the U.S. Department of State since 1972, the report provides detailed data on student flows into and out of the U.S. Visit us online at: <http://www.iie.org/opendoors>.

A QUICK LOOK AT

International Students in the U.S.

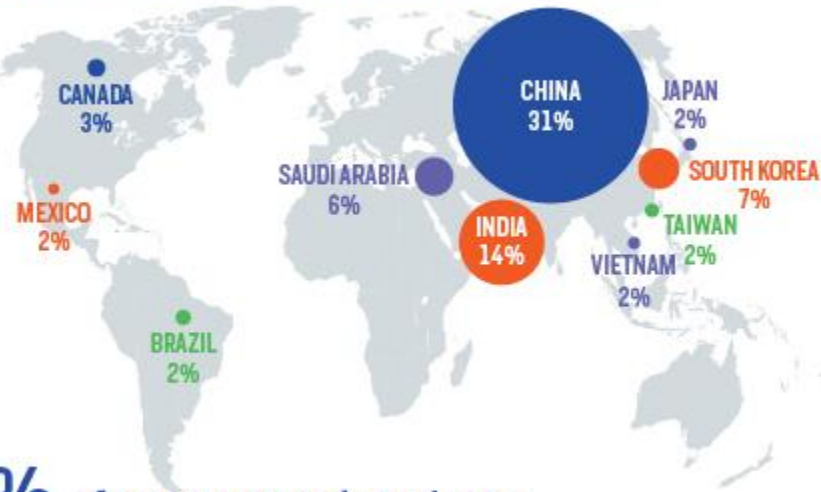
974,926 international students
studied at U.S. colleges and universities in 2014/15.

INTERNATIONAL STUDENTS IN THE U.S. 1953/54 – 2014/15



In 2014/15 international students **increased 10%**
over the prior year, the highest rate of growth since 1978/79.

TOP TEN PLACES OF ORIGIN OF INTERNATIONAL STUDENTS

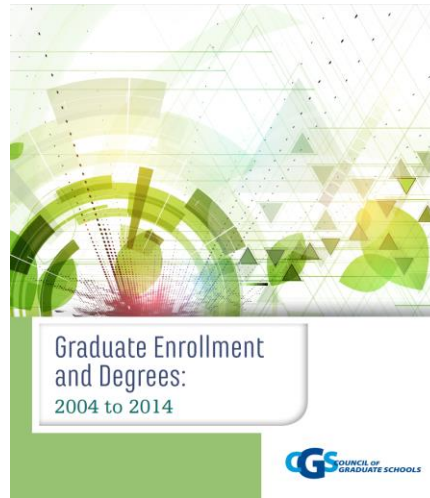
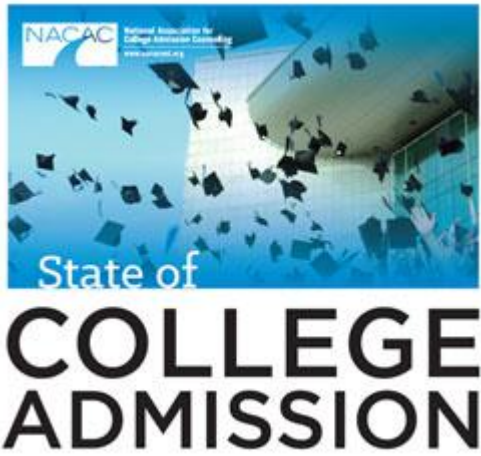


58% of international students

come from China, India, South Korea, and Saudi Arabia.

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Other sources of insight



2014

DOCTORATE RECIPIENTS FROM U.S. UNIVERSITIES
NATIONAL CENTER FOR SCIENCE AND ENGINEERING STATISTICS
DIRECTORATE FOR SOCIAL, BEHAVIORAL AND ECONOMIC SCIENCES



Generation Study Abroad

 SEARCH

IIE Summit 2016

Home

About the Initiative

News and Events

Join the Campaign

Our Commitment Partners

Opportunities

Scholarship Program

IIE Passport Awards

Become a Sponsor

Contacts

Resources For...

- Teachers
- Students
- Media | Press
- Commitment Partner Network

Generation Study Abroad™

Study abroad is more than a chance to travel - it's a career-enhancing necessity for all college students.

See the latest data on study abroad ▶



Join the Commitment – Pledge Your Action

Join IIE in mobilizing the resources to double the number of students studying abroad by the end of the decade. With your help, future generations of Americans will be ready to succeed in the global economy.

▶ Learn how to get involved

The Challenge

- International experience is one of the most important components of a 21st century education.
- Less than 10% of U.S. students study abroad.
- Globalization is changing the way the world works, and employers are increasingly looking for workers who have international skills and experience.

Every student should have the opportunity to study abroad

IIE's Generation Study Abroad
Voices Video Challenge

Deadline: June 15, 2016

www.iie.org/studyabroadalumni

Submit your video by June 15!

Generation Study Abroad™
IIE SUMMIT 2016

OCTOBER 24-26, 2016 | OHNI SHOREHAM HOTEL | WASHINGTON, DC

Subscribe

USA Study Abroad



The image shows the top portion of the USA Study Abroad website. At the top left is the logo, a blue star with a red arrow pointing right, followed by the text "USA Study Abroad". To the right of the logo is a "Select Language" dropdown menu. Below the logo and menu are four navigation links: "THE EXPERIENCE OF STUDYING ABROAD", "U.S. GOVERNMENT RESOURCES", "FOREIGN GOVERNMENT RESOURCES", and "COUNTRY & REGIONAL PROFILES". To the right of these links is a search bar with the word "SEARCH" and a magnifying glass icon. Below the navigation bar is a large hero image of five diverse young adults looking at a tablet and a map. The text "FOR U.S. STUDENTS" is positioned above the large white text "STUDY ABROAD". Below "STUDY ABROAD" is the text "Begin Your Journey →". On the right side of the hero image is a vertical stack of social media icons for Facebook, Twitter, Google+, and LinkedIn. At the bottom of the hero image is a row of five small white dots, with the first dot being blue.

USA Study Abroad

Select Language

EDUCATORS, COLLEGES & UNIVERSITIES

FOREIGN INSTITUTIONS AND GOVERNMENTS

THE EXPERIENCE OF STUDYING ABROAD

U.S. GOVERNMENT RESOURCES

FOREIGN GOVERNMENT RESOURCES

COUNTRY & REGIONAL PROFILES

SEARCH

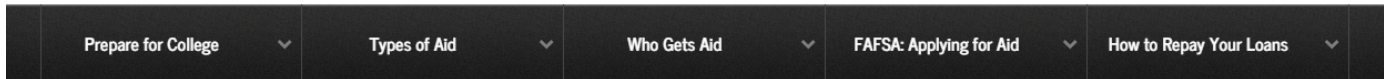
FOR U.S. STUDENTS

STUDY ABROAD

Begin Your Journey →

Facebook, Twitter, Google+, LinkedIn

Early FAFSA aka Prior-Prior Year



[Home](#) » [Announcements](#) » FAFSA Changes for 2017–18

FAFSA* Changes for 2017–18

On Sept. 14, 2015, President Obama announced significant changes to the *Free Application for Federal Student Aid* (FAFSA*) process that will impact millions of students. Starting with the 2017–18 application cycle, the following changes will be put in place:

- **Students will be able to submit a FAFSA* earlier.** Students will be able to file a 2017–18 FAFSA as early as Oct. 1, 2016, rather than beginning on Jan. 1, 2017. The earlier submission date will be a permanent change, enabling students to complete and submit a FAFSA as early as October 1 every year. (There is NO CHANGE to the 2016–17 schedule. The FAFSA became available January 1 as in previous years.)
- **Students will use earlier income information.** Beginning with the 2017–18 FAFSA, students will be required to report income information from an earlier tax year. For example, on the 2017–18 FAFSA, students (and parents, as appropriate) will report their 2015 income information, rather than their 2016 income information.

The following table provides a summary of key dates as we transition to using the early FAFSA submission timeframe and earlier tax information.

CHANGES TO THE FAFSA* PROCESS FOR 2017–18

SUBMIT A FAFSA EARLIER: Students will be able to submit a 2017–18 FAFSA as early as Oct. 1, 2016, rather than beginning on Jan. 1, 2017. The earlier submission date will be a permanent change, enabling students to complete and submit their FAFSA as early as October 1 every year. (There is NO CHANGE to the 2016–17 schedule. The 2016–17 FAFSA became available Jan. 1, 2016.)

USE EARLIER INCOME AND TAX INFORMATION: Beginning with the 2017–18 FAFSA, students will report income and tax information from an earlier tax year. For example, on the 2017–18 FAFSA, students (and parents, as appropriate) will report their 2015 income and tax information, rather than their 2016 income and tax information.

Here's a summary of key dates for submitting the FAFSA depending on when you plan to go to school.

IF YOU PLAN TO ATTEND COLLEGE FROM	YOU WILL SUBMIT THIS FAFSA	YOU CAN SUBMIT THE FAFSA FROM	USING INCOME AND TAX INFORMATION FROM
July 1, 2015–June 30, 2016	2015–16	January 1, 2015–June 30, 2016	2014
July 1, 2016–June 30, 2017	2016–17	January 1, 2016–June 30, 2017	2015
July 1, 2017–June 30, 2018	2017–18	October 1, 2016–June 30, 2018	2015
July 1, 2018–June 30, 2019	2018–19	October 1, 2017–June 30, 2019	2016

Federal Student Aid | StudentAid.gov/afsa

The New SAT


New SAT to Old SAT Concordance Table (2400 Scale)

Table 1										
New SAT Total Score (400-1600)	Old SAT Total Score (600-2400)		New SAT Total Score (400-1600)	Old SAT Total Score (600-2400)		New SAT Total Score (400-1600)	Old SAT Total Score (600-2400)		New SAT Total Score (400-1600)	Old SAT Total Score (600-2400)
400	600		710	910		1020	1390		1330	1870
410	610		720	930		1030	1400		1340	1880
420	620		730	950		1040	1420		1350	1900
430	630		740	960		1050	1430		1360	1920
440	640		750	980		1060	1450		1370	1930
450	650		760	990		1070	1460		1380	1950
460	660		770	1010		1080	1480		1390	1970
470	670		780	1030		1090	1490		1400	1990
480	680		790	1040		1100	1510		1410	2000
490	690		800	1060		1110	1530		1420	2020
500	700		810	1070		1120	1540		1430	2040
510	710		820	1090		1130	1560		1440	2060
520	720		830	1110		1140	1570		1450	2080
530	730		840	1120		1150	1590		1460	2090
540	730		850	1140		1160	1610		1470	2110
550	740		860	1150		1170	1620		1480	2130
560	750		870	1170		1180	1640		1490	2150
570	760		880	1180		1190	1650		1500	2170
580	770		890	1200		1200	1670		1510	2190
590	780		900	1210		1210	1680		1520	2210
600	790		910	1220		1220	1700		1530	2230
610	800		920	1240		1230	1710		1540	2260
620	810		930	1250		1240	1730		1550	2280
630	820		940	1270		1250	1750		1560	2300
640	830		950	1280		1260	1760		1570	2330
650	840		960	1300		1270	1780		1580	2350
660	850		970	1310		1280	1790		1590	2370
670	860		980	1330		1290	1810		1600	2390
680	870		990	1340		1300	1820			
690	880		1000	1360		1310	1840			
700	900		1010	1370		1320	1850			

The Coalition Application



[WHY THE COALITION](#) [MEMBER SCHOOLS](#) [STUDENTS](#) [COUNSELORS, TEACHERS, MENTORS, & CBOS](#)



MAKING COLLEGE
AFFORDABLE AND
ACCESSIBLE
FOR ALL STUDENTS

Welcome Annie Reznik! Our new executive director ▶

Watch a demo of the Coalition Platform technology ▶

View the enhanced FAQs ▶

CREATE YOUR ACCOUNT
Get started with the Coalition's free tools. ▶

An unprecedented coalition of diverse public and private colleges and universities has come together to improve the college admission application process for all students. The Coalition has developed a **free platform** of online tools to streamline the experience of applying to college. The initial iteration of the platform is now available for freshmen, sophomores, and juniors in high

Common App

INTERNATIONAL COLLEGES AND UNIVERSITIES

Institution Name	Country
MODUL University Vienna GmbH	AUT
Vesalius College	BEL
American University in Bulgaria	BGR
University of British Columbia - Faculty of Applied Science	CAN
Franklin University Switzerland	CHE
University of Michigan - Shanghai Jiao Tong University Joint Institute	CHN
Bard College Berlin	DEU
The American University of Paris	FRA
Bath Spa University	GBR
Hult International Business School	GBR
Keele University	GBR
King's College London	GBR
Newcastle University	GBR
Northumbria University	GBR
Plymouth University	GBR
Regent's University London	GBR
St Mary's University - London	GBR
University of Aberdeen	GBR
University of Birmingham England	GBR
University of Bristol	GBR
University of Glasgow	GBR
University of Sheffield	GBR
University of St Andrews	GBR
University of Stirling	GBR
University of Strathclyde	GBR
Jacobs University Bremen gGmbH	GER
University of Limerick	IRL
John Cabot University in Rome	ITA
The American University of Rome	ITA
Underwood International College, Yonsei University	KOR
Riga Technical University Riga Business School	LAT
Northwestern University in Qatar	QAT
Yale NUS College	SGP

Cuba

Charting a New Course on Cuba



CUBA POLICY | FAILED APPROACH | NEXT STEPS

f | | GO TO TOP

NAFSA Cuba Engagement Initiative

The NAFSA Cuba Engagement Initiative focuses on creating sustainable partnerships between U.S. and Cuban academic institutions. The initiative builds on NAFSA's longstanding focus on Latin America and Cuba and redoubles NAFSA's commitment to the use of academic exchanges and partnerships to build a more globally engaged United States and develop new opportunities for U.S. and Cuban international higher education leaders to collaborate. The NAFSA Cuba Engagement Initiative is comprised of two interconnected projects: the Cuba-U.S. Higher Education Dialogue Project and the Educators for Cuba Campaign.



"As the U.S. and Cuban governments continue the historic process of normalizing relations, it is important that people and cultures that have been separated for over 50 years have a structured and meaningful framework in which to engage and learn from each other. International education and partnerships have always played an important role in building understanding and collaboration between nations, and we now have a chance to play our part in this historic process."

~Marlene M. Johnson, NAFSA Executive Director and CEO

IIE Cuba Higher Education Initiative

SEARCH

Home

IAPP Cuba

Conference Calls

Resources

Resources For...

▶ IAPP Cuba Cohort

Fostering U.S.-Cuban Higher Education Engagement

Learn more ▶

What is the Cuba Higher Education Initiative?

The IIE Cuba Higher Education Initiative seeks to foster and increase engagement between U.S. and Cuban universities and colleges. The Cuba initiative includes the International Academic Partnership Program (IAPP) with Cuba, a six-month program that assists higher education institutions in developing a strategic

THIS PROGRAM IS ADMINISTERED BY IIE



Cheating in China

REUTERS INVESTIGATES

Share



CAMPUS CRISIS: A cheating ring at the University of Iowa demonstrates the damage being done by a booming East Asian industry on the U.S. higher education system. Some students hire companies to write application essays, help them game the SAT, and even do their college coursework. REUTERS/Koh Gui Qing

Deception 101

How an industry helps Chinese students cheat their way into and through U.S. colleges

By [Koh Gui Qing](#), [Alexandra Harney](#), [Steve Stecklow](#) and [James Pomfret](#) | Filed May 25, 2016, 6:30 p.m. GMT

Part Three: The University of Iowa suspects at least 30 Chinese students of having used ringers to take their exams. The case offers a look inside a thriving underground economy of cheating services aimed at the hundreds of thousands of Chinese kids applying to and attending foreign colleges.

2016 Presidential Election

- July 18th – 21st, Republican National Convention
- July 25th – 28th, Democratic National Convention
- November 8th, 58th presidential election



Bernie Sanders, Democratic Candidate

- Free in state tuition for all
- Financial aid and student loan refinancing
- DREAMers



Hillary Clinton, Democratic Candidate

- Create debt free education
- Higher Education Act in 2017
- Loan refinancing
- Sexual assault on campus



"I'm just not entirely sure a big red arrow pointing right is the best logo for a Democratic candidate, is all."

Donald Trump, Republican Candidate

- Common Core
- Department of Education
- Job creation
- Trump University suit



White House Initiatives

- Community College
- College and Career Readiness, College Scorecard
- Every Student Succeeds Act (ESSA)
- Computer Science for All





Higher Education in the United States and Colorado

Ina Morris

Chief Advocacy and Outreach Office, Colorado
Department of Higher Education
and
Director, StudyColorado

Welcome to Colorado !



So Where is Colorado?

“one of those square states in the middle”



Demographics

- About the size of New Zealand, half the size of France
- Capital City: Denver
- Colorado Population: almost 5.4 million
- Largest Minority: Hispanic, 21%
- 2nd most educated state in US
(bachelor's degrees among
adult population)



U.S. Higher Education

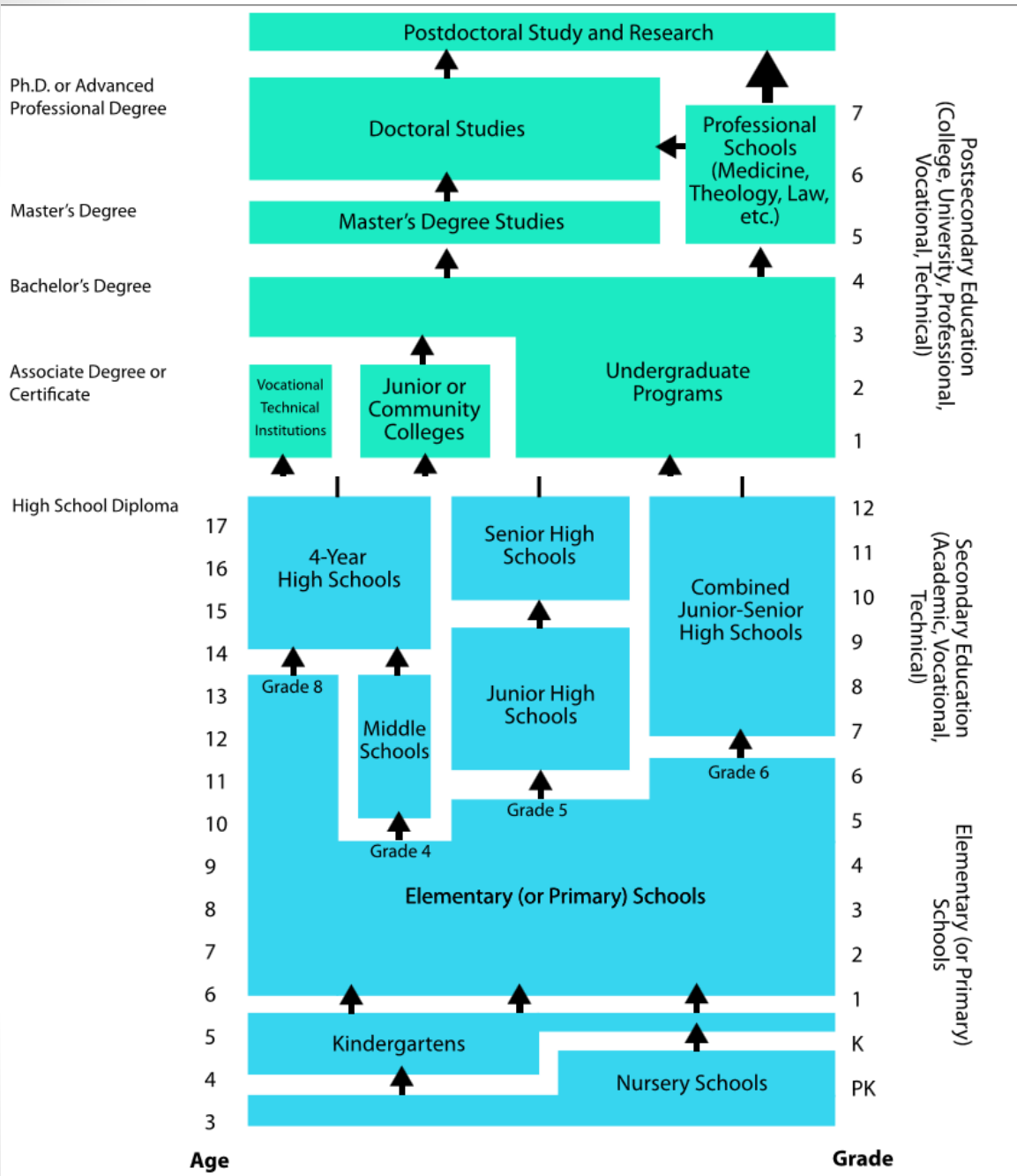
A few terms

- Higher Education = post-secondary education = tertiary education
- “College” can mean:
 - Attending a university or college – “Are you going to college after you graduate?”
 - A 4-year college, e.g., Fort Lewis College in Durango, Colorado
 - A college within a university, e.g., college of business at the University of Colorado
- “Completion” can mean a certificate or degree or even transfer to another institution

U.S. Higher Education

Types of Institutions

- Public (state-funded) vs private
 - Private: for profit and nonprofit
- Carnegie Classification
 - Community Colleges or Junior Colleges or Associate's Colleges
 - Baccalaureate Colleges
 - Masters Colleges and Universities
 - Doctorate-Granting Institutions
 - Other (Special Focus, Tribal)
- In Colorado, we use:
 - Community Colleges (including Junior Colleges)
 - Four Year Institutions (including some with Masters programs)
 - Research Institutions
 - Private
 - Degree granting institutions
 - Occupational schools
 - Other....



U.S. Higher Education Governance

- Governance of higher education in the US is described as a “triad”: the three-legged system of the federal government, accrediting agencies, states
 - Federal government – oversees financial aid. NOT a centralized authority, NOT responsible for quality control
 - Accrediting agencies – private nonprofit organizations that establish criteria and requirements to ensure similar quality among its institutions
 - State government – authorizes institutions, other statewide responsibilities vary from coordinating to regulatory
 - Typically state funding, capital construction, enrollment policy and tuition

U.S. Higher Education

A bit more on accreditation

- Institutional accreditors – regional and national accreditation organizations that review entire institutions
- Programmatic accreditors – specialized and professional accrediting organizations that review specific programs or subject area offerings
- Accreditation accreditor – Council for Higher Education Accreditation (CHEA)

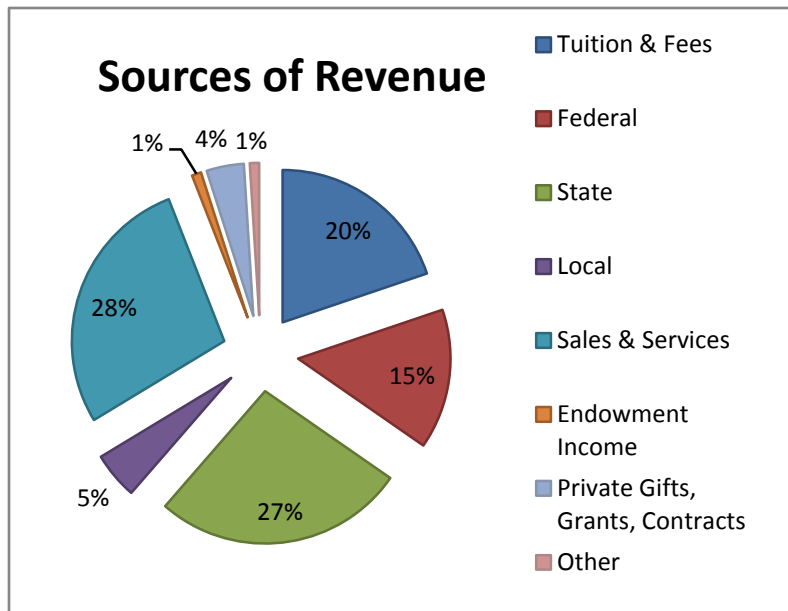
Higher Education by the Numbers

	United States	Colorado
Number of Institutions*	4,726 (3,026 4-year, 1,700 2-year)	Public: 14 4-year; 17 2-year Private: 52
Number of Students	Appx 21,000,000 (86% undergraduate)	Appx 375,000 (Appx 83% undergraduate)
Students enrolled at Public (vs Private)	Appx 78%	Appx 67%
Women vs Men	57% : 43%	53% : 47%
Number of International Students (2014-15)	974,926	10,800

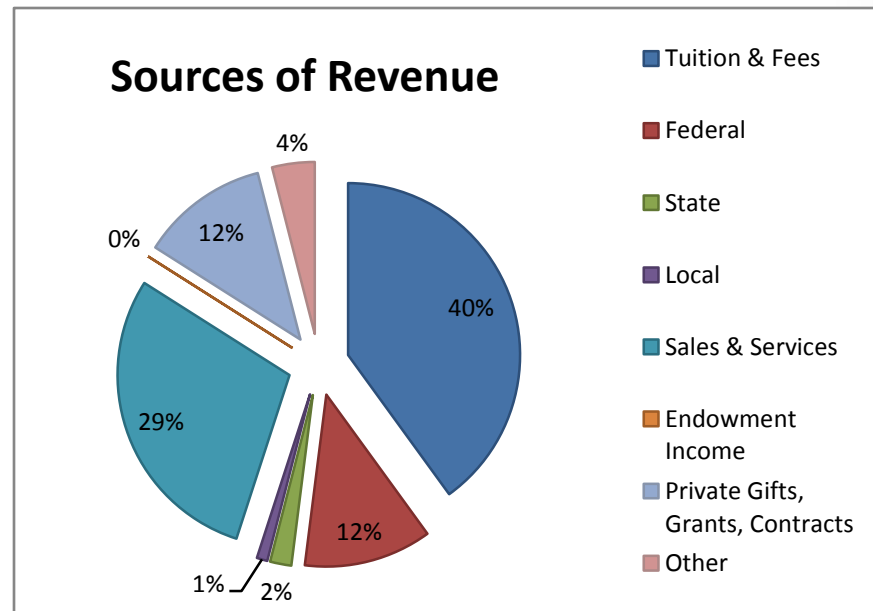
*Degree-granting, Title IV eligible

U.S. Higher Education Funding

Public Institutions



Private Institutions



Average Tuition and Fees

(Undergraduate, in-state)

United States

	2003-2004	2013-2014
4 Year Private	\$24,070	\$30,090
4 Year Public	\$5,900	\$8,890
Community College	\$2,420	\$3,260

Colorado

	2003-2004	2013-2014
4 Year Private		
4 Year Public	\$2,678	\$9,082
Community College	\$1,585	\$3,849

Higher Education in the US

Current Issues and Trends

- Traditional student less and less the norm
- Decreased state funding and rising tuition
- Increasing student debt
- Better alignment with K-12
 - Concurrent enrollment
- Blurred roles and missions
- Performance-based funding
- Need for more degrees and credentials
- New approaches to post-secondary education
 - E.g., boot camps, MOOCs, competency-based education

Colorado's Master Plan

- Increase credentials
- Improve student success
- Reduce gaps
- Restore fiscal balance

International Students in Colorado

- 10,800 international students in Colorado in 2014-15
- Top sending countries

Colorado

China

India

Saudi Arabia

Brazil

South Korea

United States

China

India

South Korea

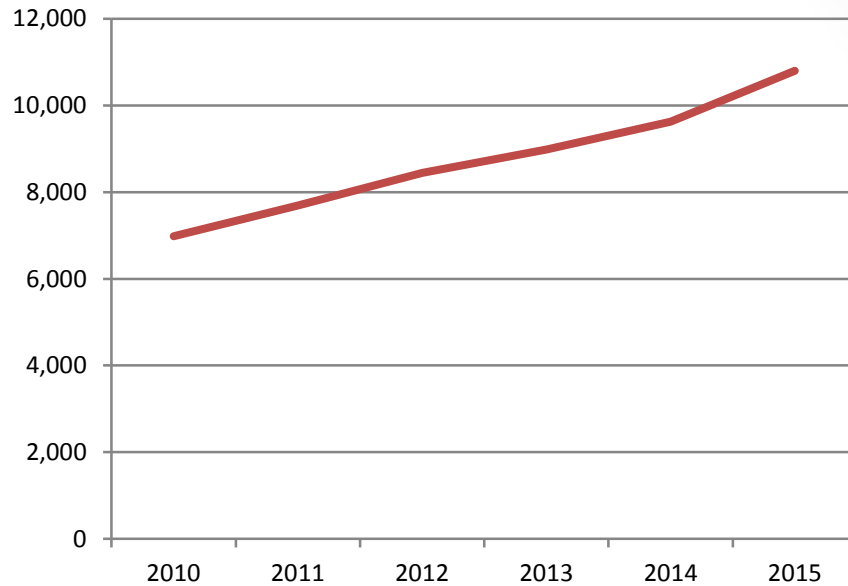
- 5355 Colorado students went abroad
- Top Study Abroad countries:
UK, Italy, Spain, France
- Where are students going in the US?
California, Texas, New York

StudyColorado

- An initiative housed at the Colorado Department of Higher education
- 25 members, 35+ campuses
- Promote internationalization of higher education in Colorado
- Work with institutions, state government agencies and business

Trends

International Students in Colorado



- Growth countries: Brazil, India, Kuwait
- Reduced budgets -> webinars, agents, pathway programs (INTO)
- Shorter-term visits
- Government sponsored programs ?

Some StudyColorado Activities

- (June 2013) Participated in Inaugural Denver–Narita United Airlines NonStop Flight
- (June 2014) Accompanies Governor’s Mission to Mexico
- Annual International Student Conferences (July 2013, September 2014)
- Annual Receptions for EducationUsa Advisors in Washington, DC
- Advocated with Saudi Mission on behalf of all StudyColorado members
 - Colorado had been closed to Saudi students for one year
 - StudyColorado sent letter from Lt Governor and facilitated meeting.
- Awarded two grants from U.S. Department of State (through IIE) to host higher education professionals
- NAFSA!!!

What our members are saying about StudyColorado

- This organization plays at least two vital roles ... First, the power of a united group of government, industry, and higher education working to showcase Colorado could not reach the same audiences if any of the institutions were to try to market individually. Second, the ability for the same constituents to meet regularly to create a marketing strategy, share resources, and consult with each other also brings a value beyond the united marketing front.
- Traditionally, community colleges have not been large participants in the area of international student recruitment or internationalization. .. Study Colorado reinforces the importance of a global presence. It gives an added legitimacy to our passion for connecting to the world.
- ...Whether we like it or not, even in the higher education sector, we are all entrepreneurs. At each of our institutions we have worked hard to make ends meet and I believe that collectively we can gain much by sharing our funding strategies and perhaps establish joint projects which would either lower our individual costs or simply allow us generate more revenue.

Break (15 minutes)

US Market Updates

Stephanie Blochinger

Education Officer
British Council USA

Jenna Hartsell

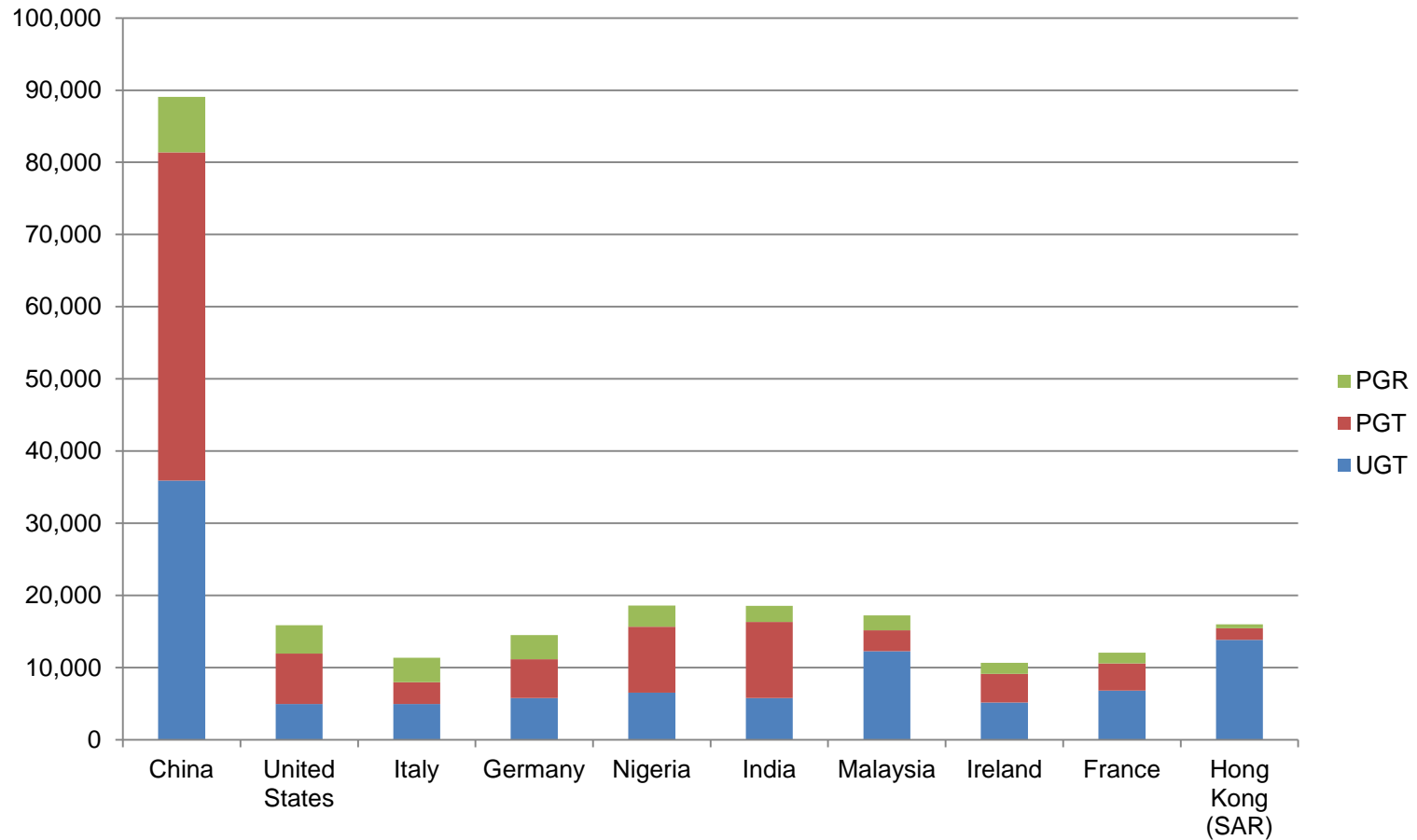
Education Coordinator
British Council USA

Top sending countries to the UK

Rank	Country of Domicile	# of students studying in the UK 2014-2015	Rank	Country of Domicile	# of students studying in the UK 2014-2015
1	China	94,995	11	Greece	11,030
2	United States	27,650	12	Spain	9,825
3	India	19,485	13	Cyprus (EU)	9,795
4	Nigeria	18,950	14	Saudi Arabia	9,740
5	Germany	18,135	15	Singapore	7,820
6	Malaysia	17,945	16	Canada	7,750
7	Hong Kong (SAR)	16,965	17	Romania	6,800
8	France	16,430	18	Thailand	6,740
9	Italy	12,745	19	Pakistan	6,575
10	Ireland	11,430	20	Bulgaria	6,425

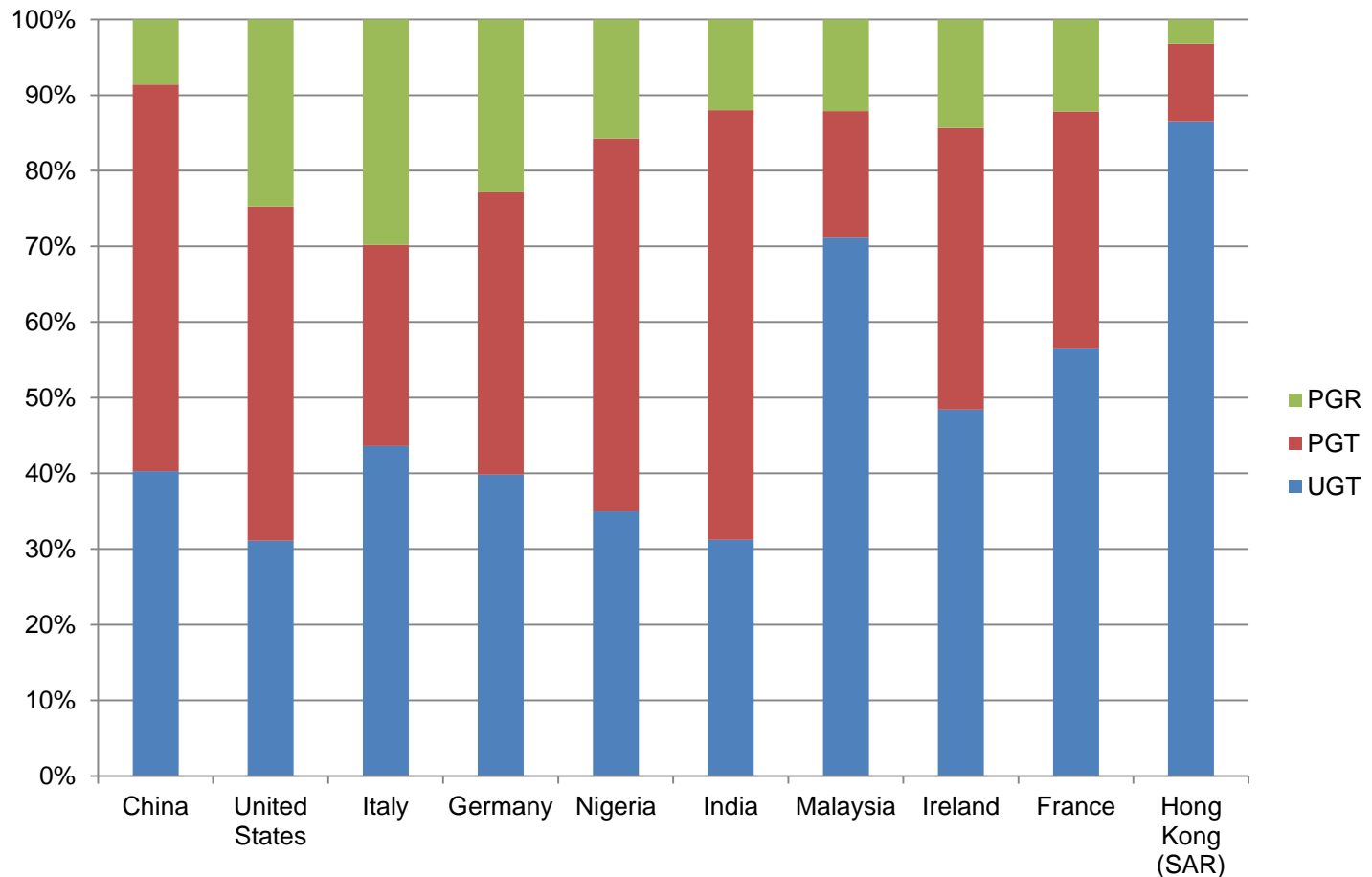
Source: HESA Student record 2002/03 - 2014/15 ©British Council

Top 10 Sources of International Students



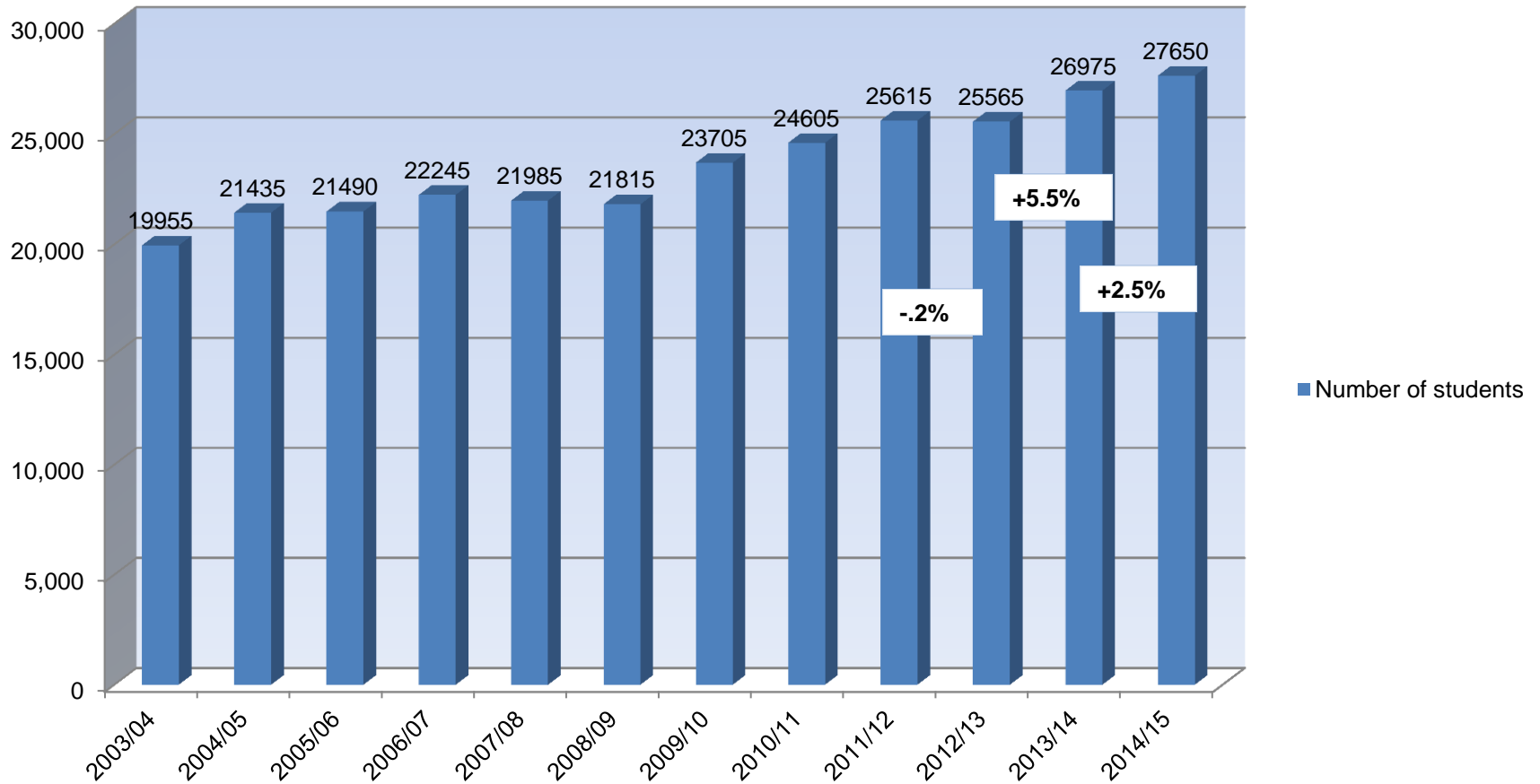
Source: HESA Student record 2002/03 - 2014/15 ©British Council

Top 10 Sources of International Students



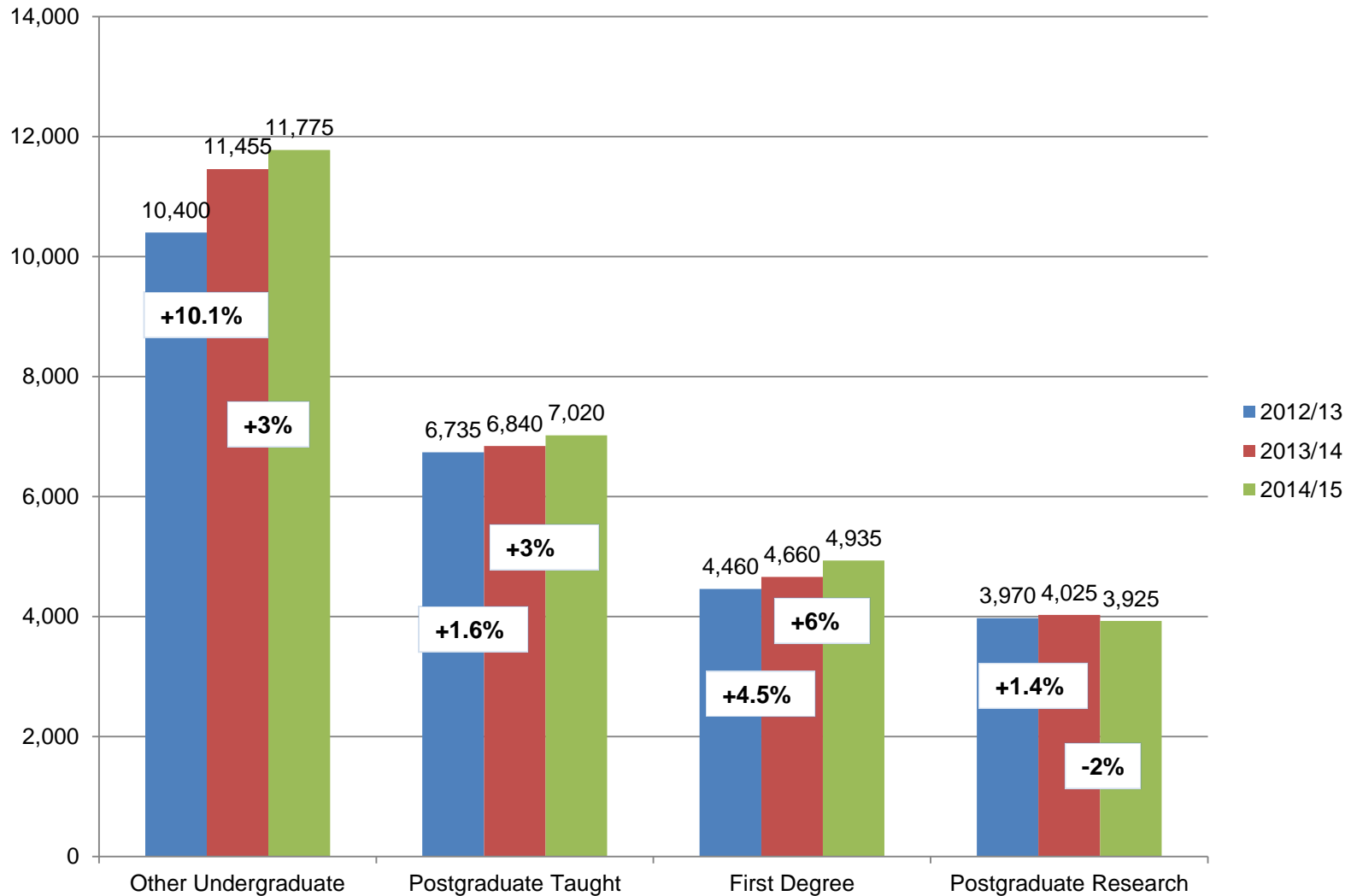
Source: HESA Student record 2002/03 - 2014/15 ©British Council

US: Student enrollment in the UK 2003/04-2014/15



Source: HESA Student record 2002/03 - 2014/15 ©British Council

US: Level of study in UK 2012/13-2014/15

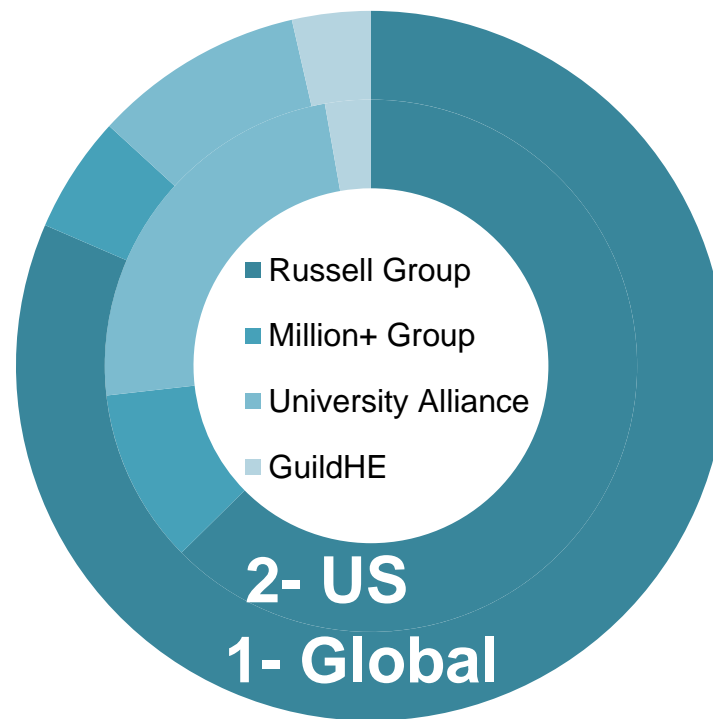


Source: HESA Student record 2002/03 - 2014/15 ©British Council

UK Benchmarking: US & the world

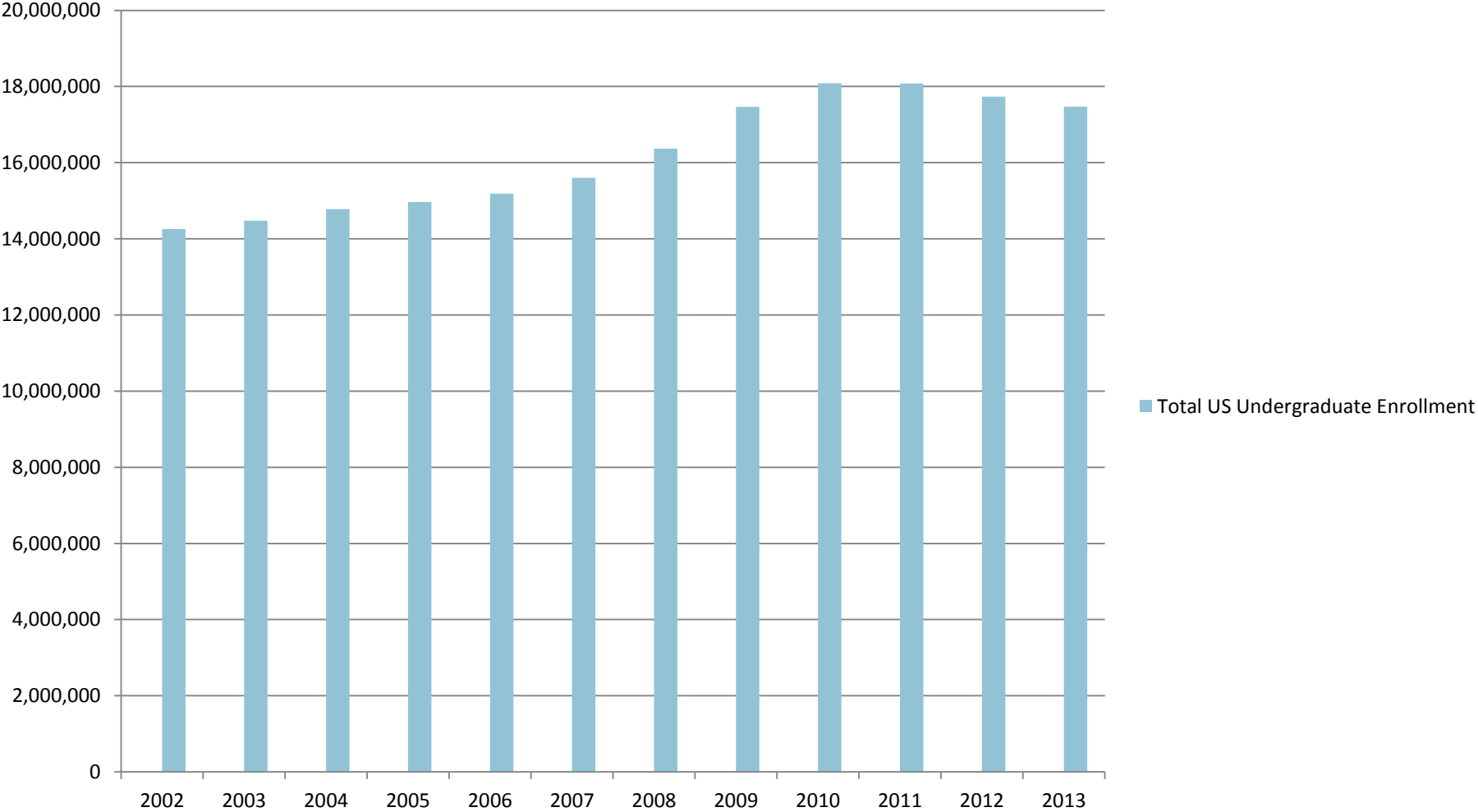
By mission group (UGT, PGT, PGR, 2014/15)

INSTITUTION GROUP	UNITED STATES	GLOBAL
	Russell Group	82%
University Alliance	10%	24%
Million+ Group	5%	11%
GuildHE	4%	3%



Source: HESA Student record 2002/03 - 2014/15 ©British Council

US: Domestic undergraduate enrollment 2002-2014



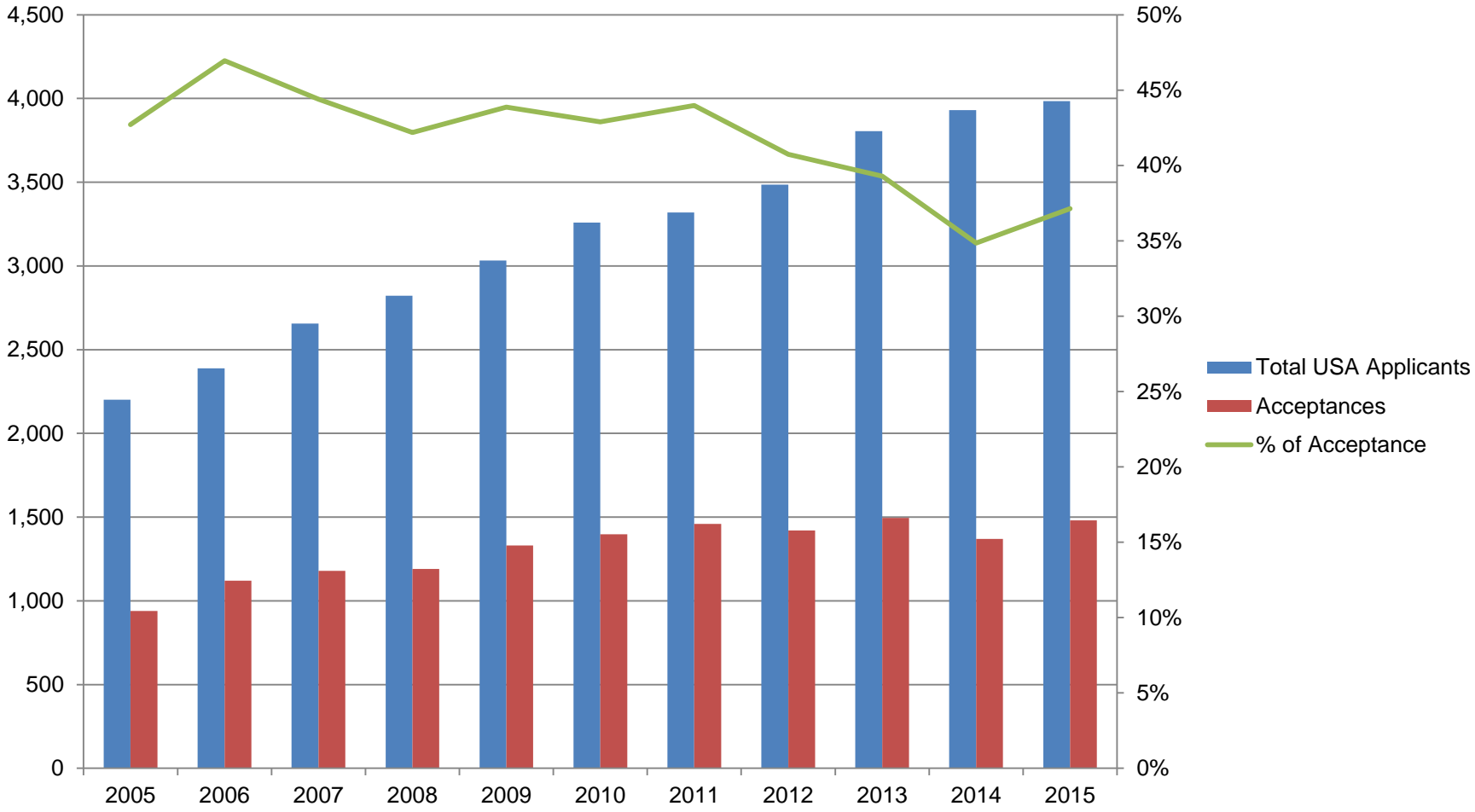
Source: U.S. Department of Education, National Center for Education Statistics, Higher Education General Information Survey (HEGIS), March 2015

US: Domestic and UK undergraduate enrollment 2003-2013



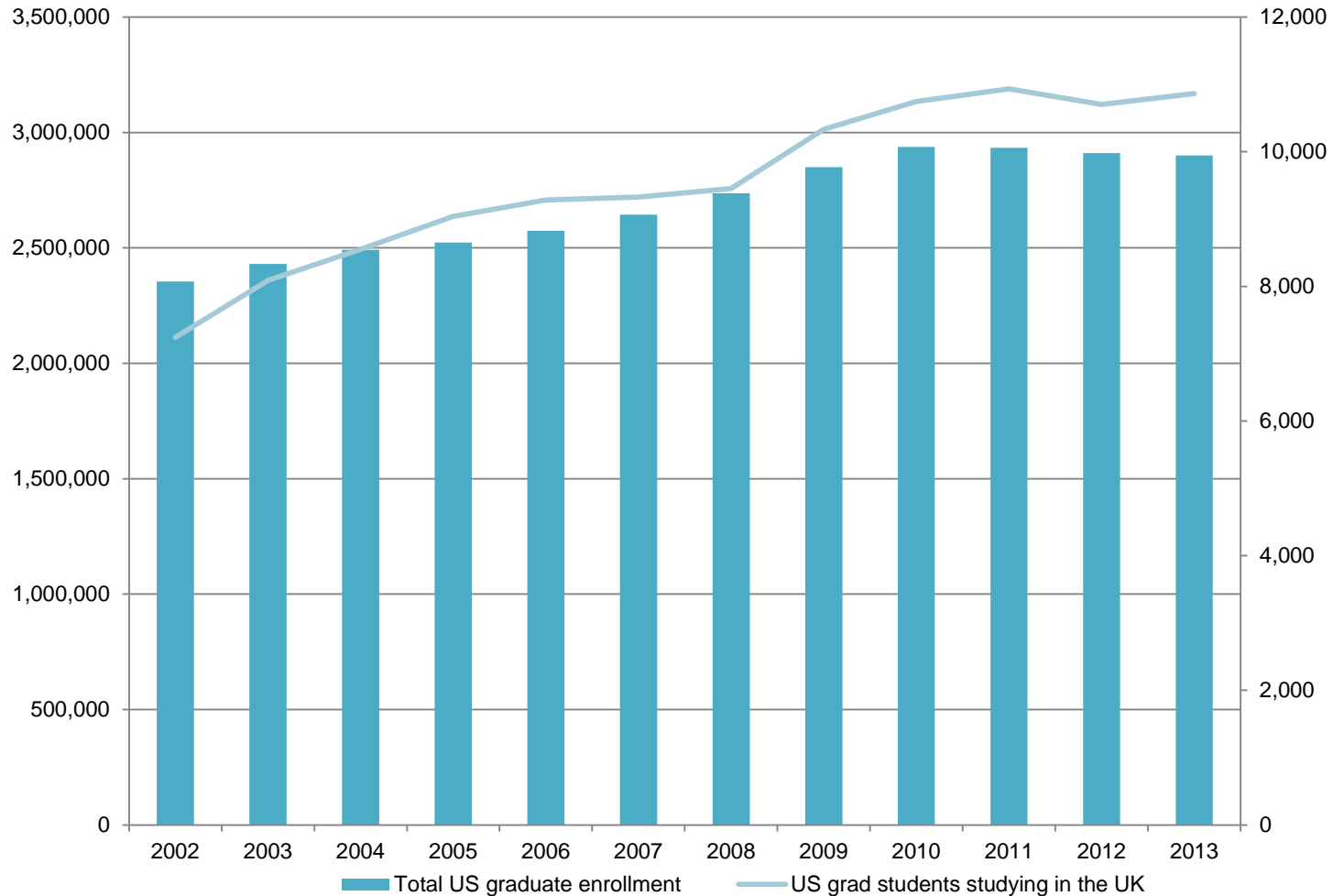
Source: U.S. Department of Education, National Center for Education Statistics, Higher Education General Information Survey (HEGIS), March 2015 and HESA Student record 2002/03 - 2014/15 ©British Council

US: Undergraduate acceptance rates in the UK 2004-2013



Source: Universities and Colleges Admissions Service (UCAS). www.ucas.com/international. Retrieved 24 March 2016.

US: Domestic and UK postgraduate enrollment



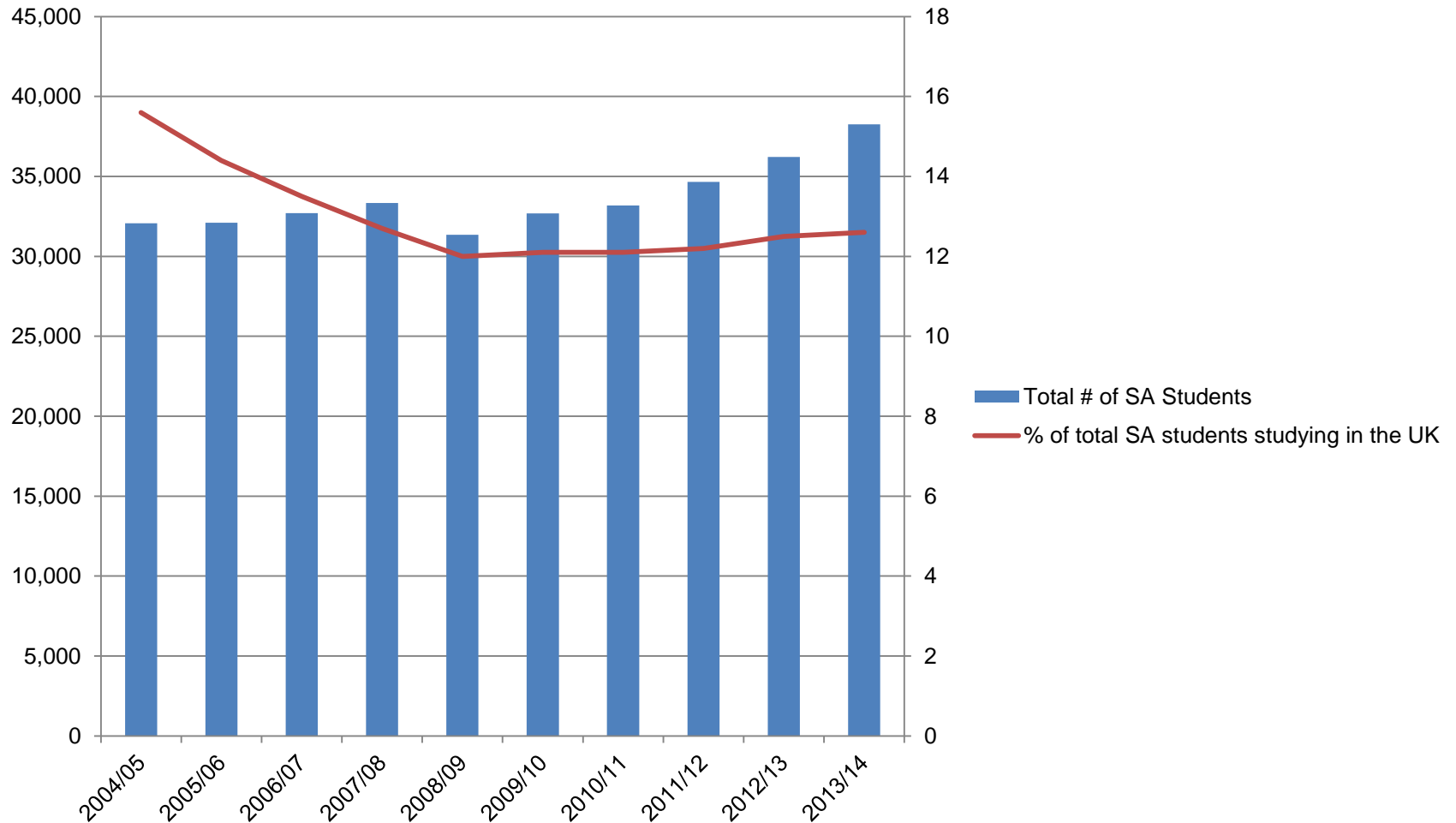
Source: U.S. Department of Education, National Center for Education Statistics, Higher Education General Information Survey (HEGIS), March 2015 and HESA Student record 2002/03 - 2014/15 ©British Council

Top global destinations for US SAE participants

Country	2012/13	2013/14	Change	% of all US students studying abroad
UK	36,210	38,250	+5.6	12.6
Italy	29,848	31,166	+4.4	10.2
Spain	26,281	26,949	-2.5	8.9
France	17,210	17,597	+2.2	5.8
China	14,413	13,763	-4.5	4.5
Totals	289,408	304,467	+5.2	100

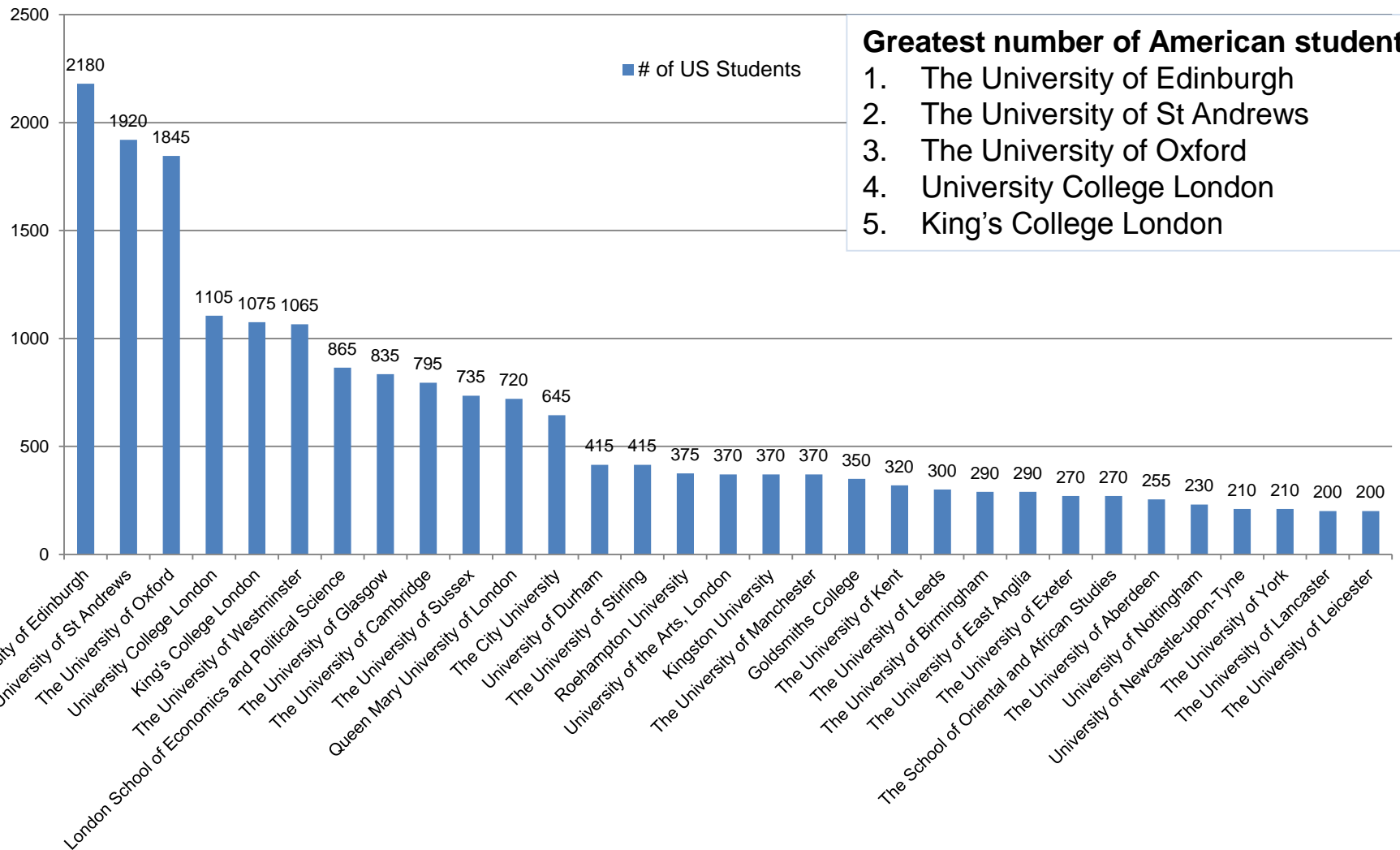
Source: Institute of International Education. (2015). "Top 25 Destinations of U.S. Study Abroad Students, 2012/13 -2013/14." Open Doors Report on International Educational Exchange. Retrieved from <http://www.iie.org/opendoors>

UK market share of US SAE students



Source: Institute of International Education. (2015). "Top 25 Destinations of U.S. Study Abroad Students, 2012/13 -2013/14." Open Doors Report on International Educational Exchange. Retrieved from <http://www.iie.org/opendoors>

US: Where students studied in the UK in 2014/15

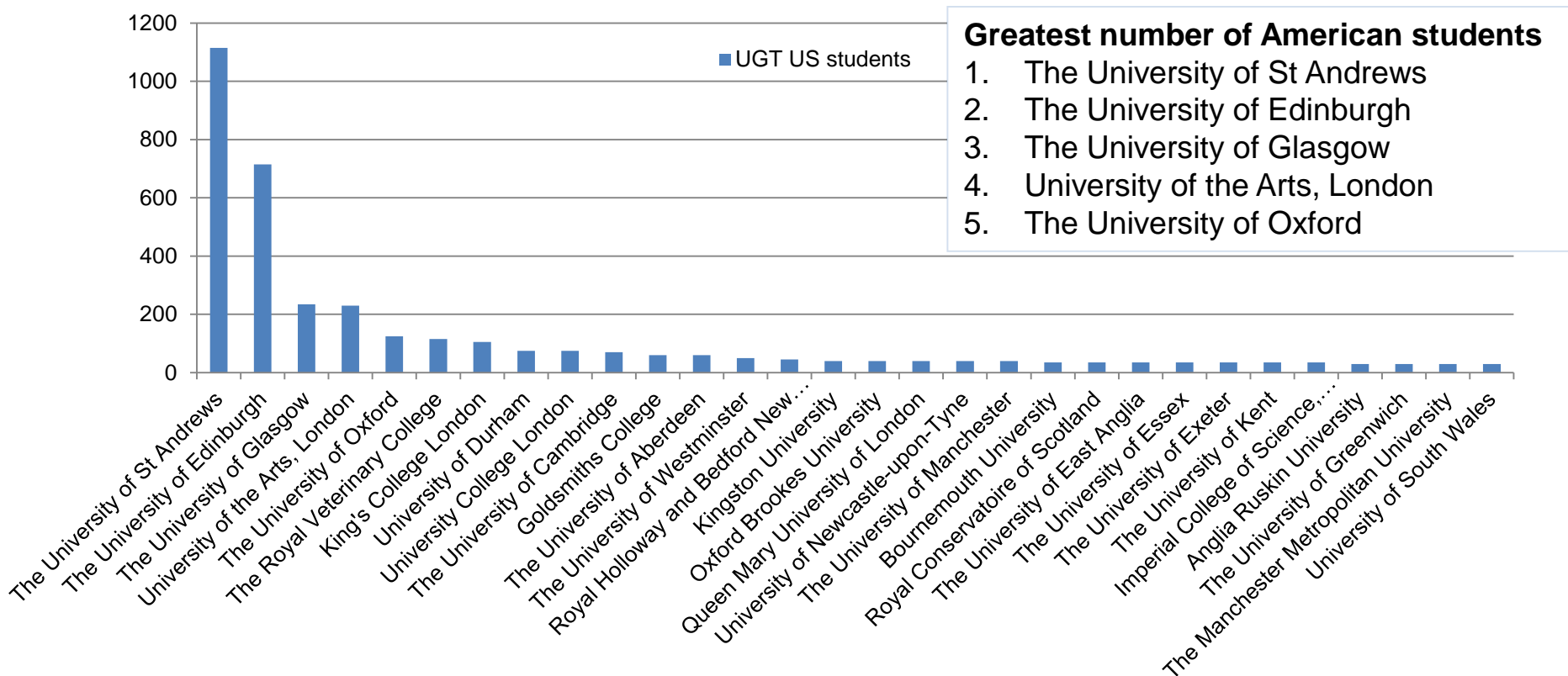


Greatest number of American students

1. The University of Edinburgh
2. The University of St Andrews
3. The University of Oxford
4. University College London
5. King's College London

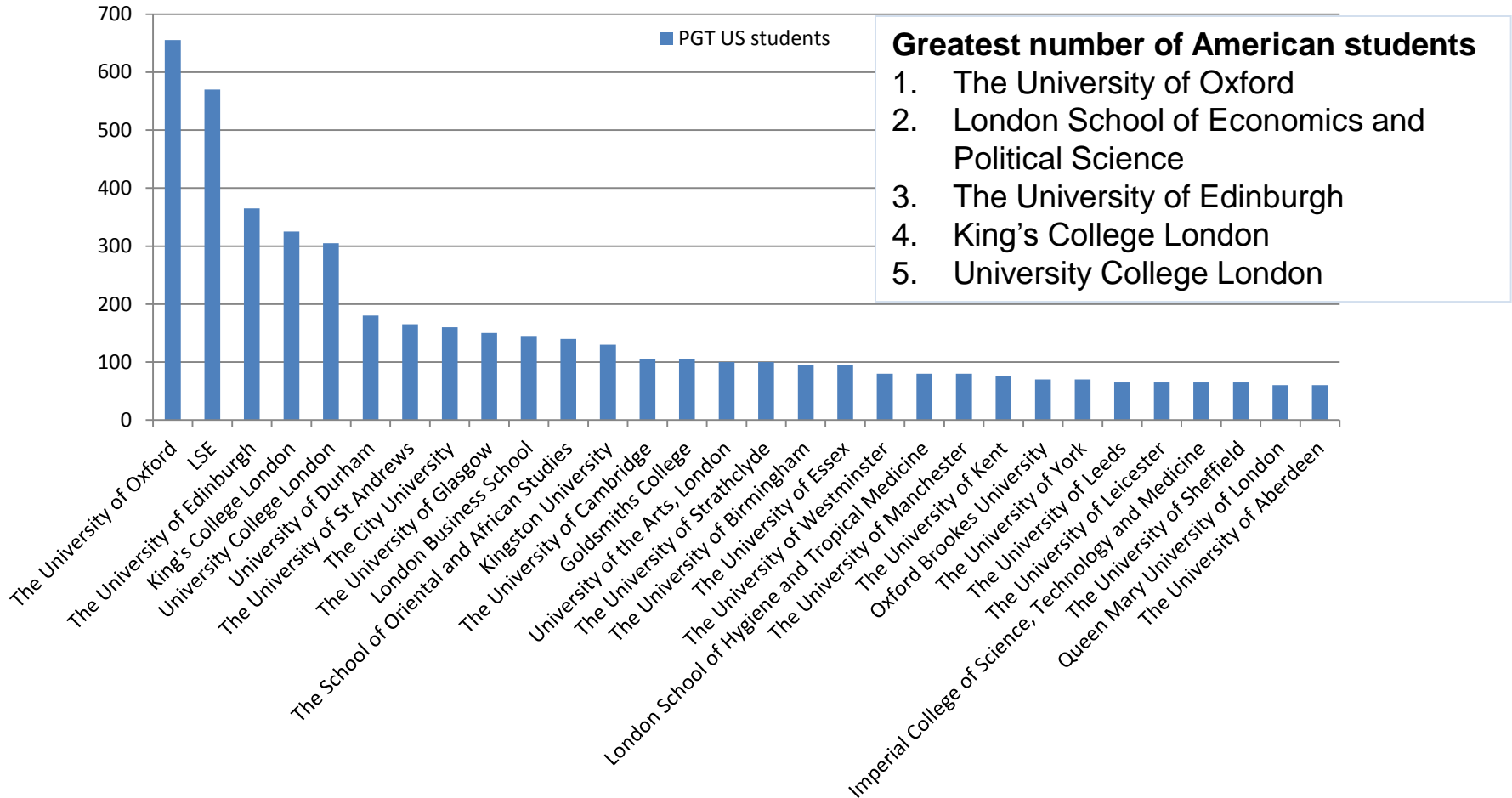
Source: HESA Student record 2002/03 - 2014/15 ©British Council

US: Where UGT students studied in the UK in 2014/15



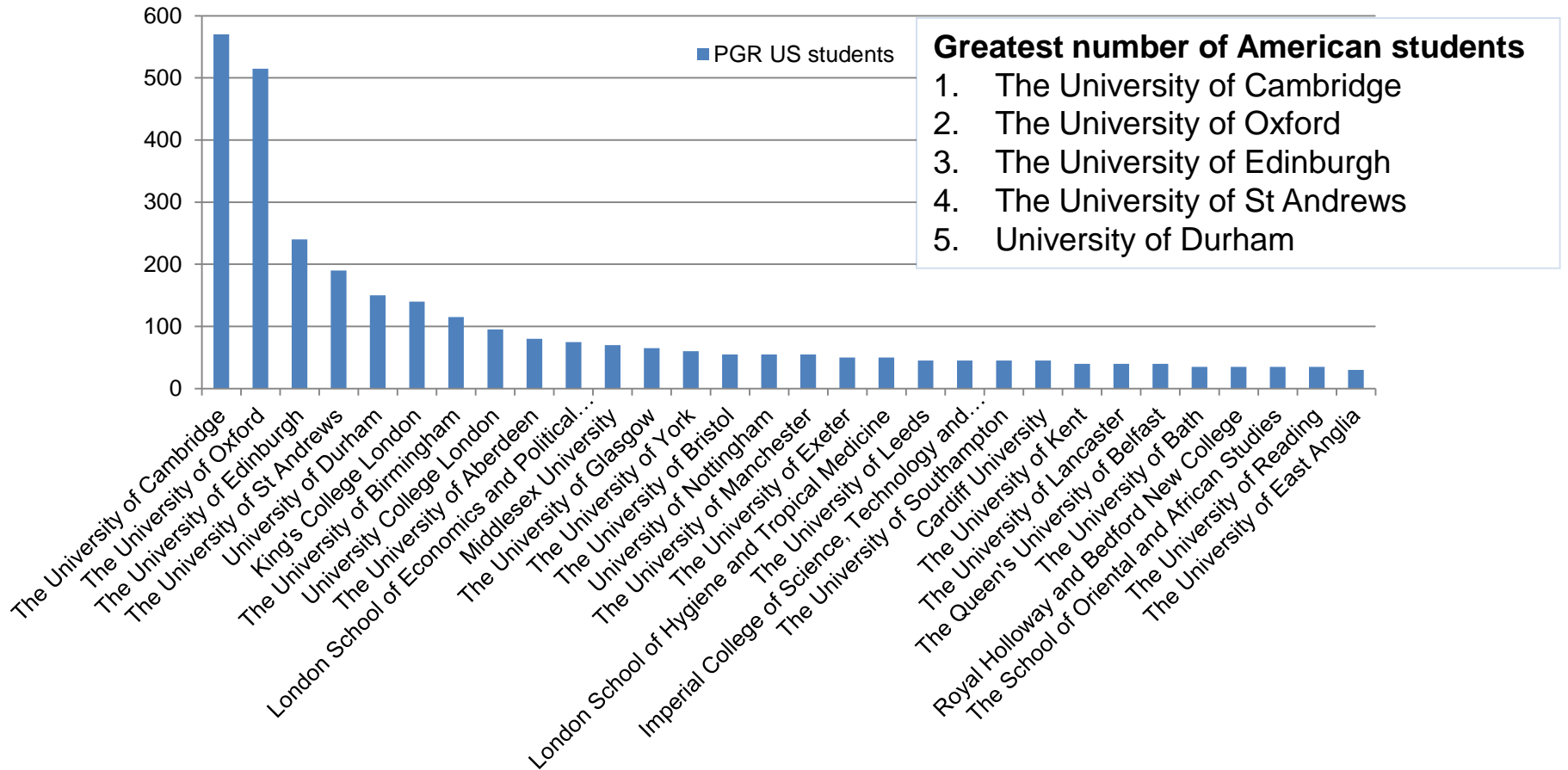
Source: HESA Student record 2002/03 - 2014/15 ©British Council

US: Where PGT students studied in the UK in 2014/15



Source: HESA Student record 2002/03 - 2014/15 ©British Council

US: Where PGR students studied in the UK in 2014/15



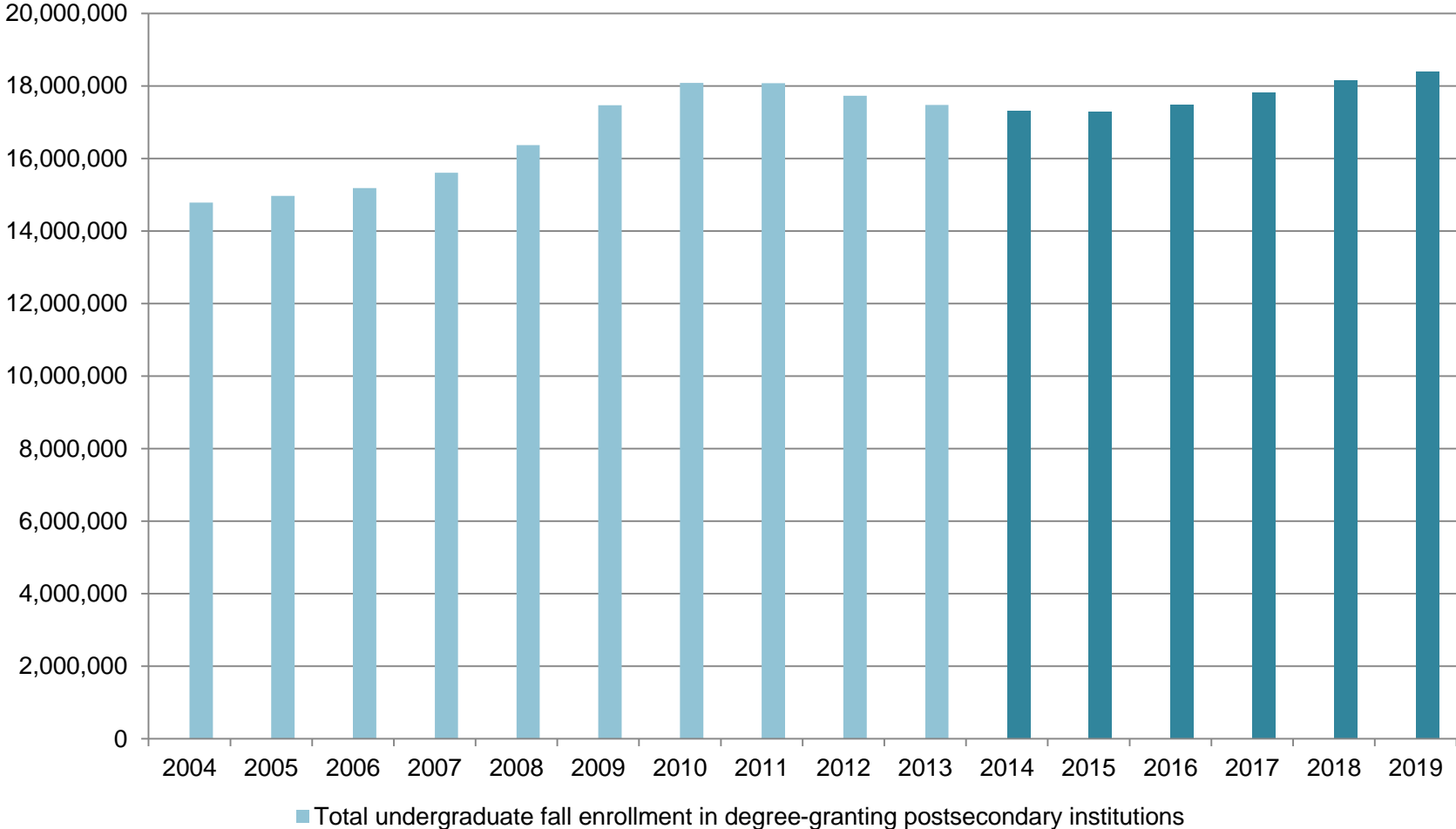
Looking forward: UCAS indicators

Domicile of applicant	2012	2013	2014	2015	2016
Not EU	53,200	56,090	61,690	63,680	62,430
Not EU	-5%	0%	10%	3%	-2%

- Future Indicators
 - April interim comparison point

Looking forward: US student enrollment indicators

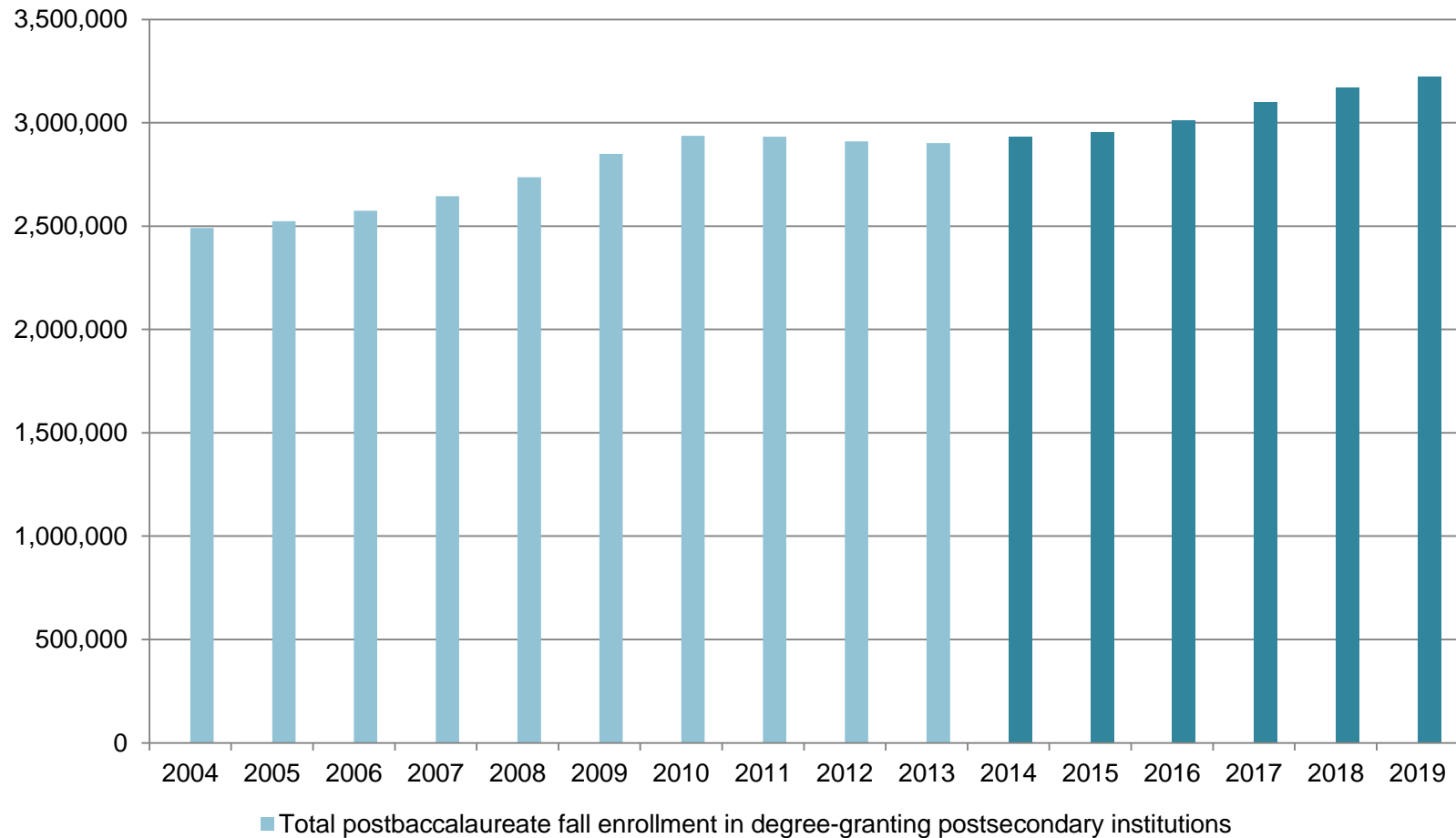
Domestic undergraduate enrollment in the US, actual (2002-2013) and predicted (2014-2019)



Source: U.S. Department of Education, National Center for Education Statistics, Higher Education General Information Survey (HEGIS), March 2015

Looking forward: US student enrollment indicators

Domestic postgraduate enrollment in the US, actual (2002-2013) and predicted (2014-2019)



Domestic Freshman Migrations

Out-of-state students, NCES 2014

TOP 5 SENDING STATES

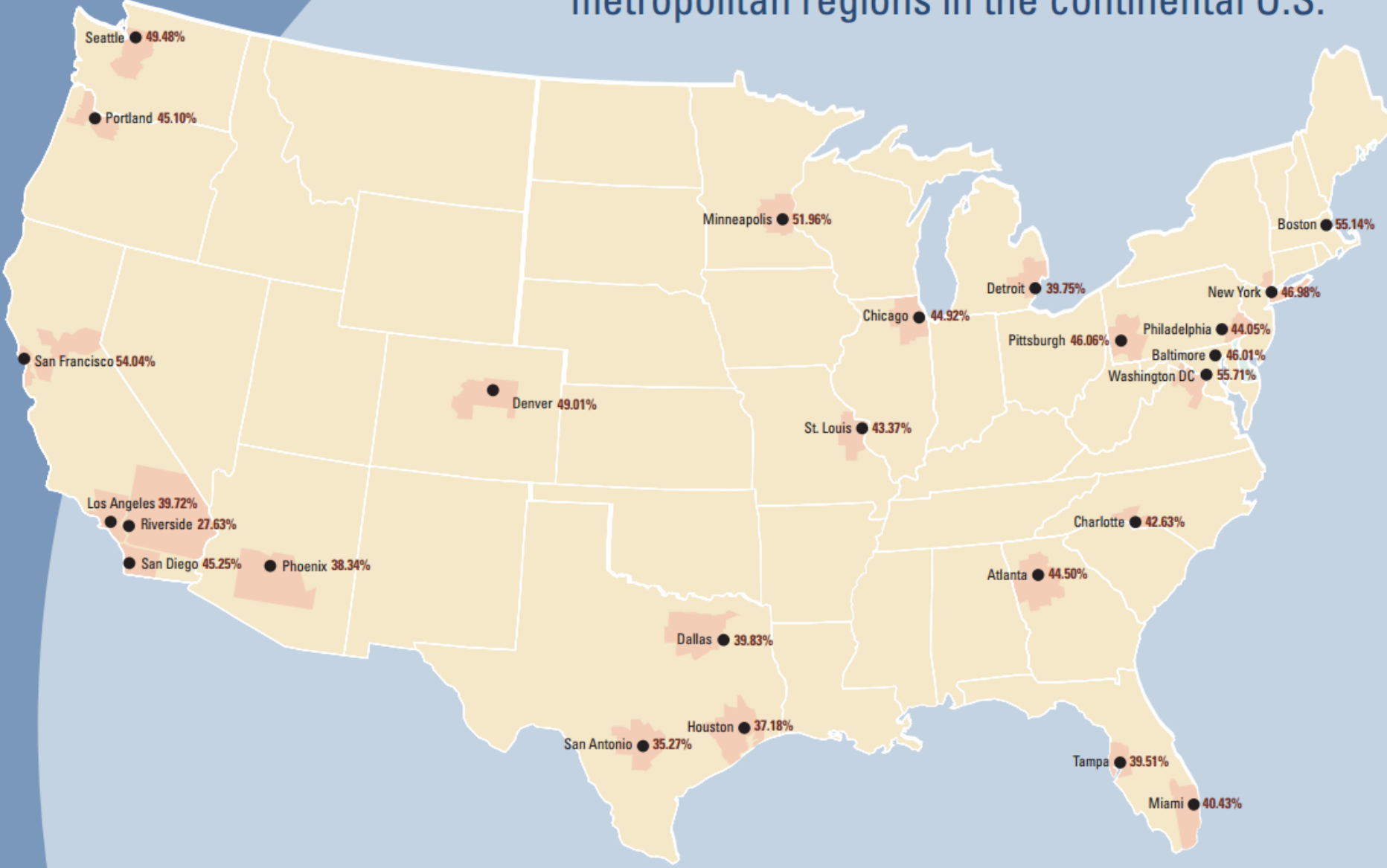
California	41,820
New Jersey	34,813
Illinois	33,696
New York	33,050
Texas	26,515

TOP 5 NET SENDING STATES

New Jersey	29,101
Illinois	16,623
Maryland	8,442
Texas	8,155
Connecticut	5,249

Source: U.S. Department of Education, National Center for Education Statistics, Higher Education General Information Survey (HEGIS), March 2015

Degree attainment in the 25 most populous metropolitan regions in the continental U.S.



Americas Updates

Salvador López Carbajal

Regional Director of Higher Education, Americas
British Council Americas

BRITISH COUNCIL'S HIGHER EDUCATION STRATEGY IN THE AMERICAS

REGIONAL PLAN 2016-2017

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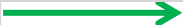

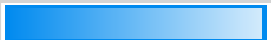




























OUR ASSESSMENT OF EDUCATION SYSTEMS IN THE AMERICAS:

**The shape of global higher education: national
policies framework for international engagement**



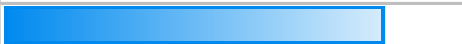
















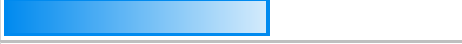


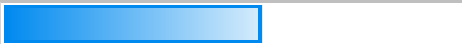




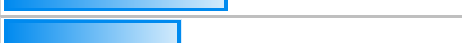




Overview: categories and indicators	Weight
1. Openness and mobility	0.33
1.1 IHE strategy	0.25
1.2 Student mobility policies	0.25
1.3 Academic mobility and research policies	0.25
1.4 Programme and provider mobility	0.25
2. Quality assurance and degree recognition	0.33
2.1 International students' quality assurance and admissions	0.33
2.2 Quality assurance of academic programmes	0.33
2.3 Recognition of overseas qualifications	0.33
3. Access and sustainability	0.33
3.1 Student mobility funding	0.33
3.2 Academic mobility and research funding	0.33
3.3 Sustainable development policies	0.33
Total	1.0

	OVERALL SCORE	OPENNESS	QUALITY ASSURANCE AND RECOGNITION	ACCESS AND SUSTAINABILITY
Australia	Very high	Very high	Very high	high
Botswana	Low	high	Low	Low
Brazil	Low	high	Very Low	high
Chile	Low	Low	Very Low	high
China	high	Very high	Low	Very high
Colombia	Low	Low	Very Low	Very high
Egypt	Low	Low	Low	high
Ethiopia	Very Low	Low	Very Low	Very Low
Germany	Very high	Very high	Very high	Veryhigh
Ghana	Low	Low	Low	Low
India	High	High	Low	High
Indonesia	High	High	Low	Very High
Kazakhstan	High	Low	Low	High
Kenya	Low	High	Low	Low
Malaysia	Very High	Very High	Very High	Very High
Mexico	Low	Very Low	Very Low	High
Nigeria	Low	Low	Very Low	Low
Pakistan	High	High	Low	High
Philippines	High	High	High	Low
Russia	High	High	Low	High
South Africa	Low	High	High	Low
Thailand	High	High	Low	Very High
Turkey	High	High	Low	Very High
United Kingdom	Very High	Very High	Very High	High
United States	High	High	Low	High
Vietnam	High	High	High	High

Openness and international mobility policies			
Rank / 26	Country	Score / 10	Rating
	1 Australia		Very strong
	2 United Kingdom		Very strong
	3 Germany		Very strong
	4 Malaysia		Very strong
	5 China		Very strong
	6 Vietnam		Strong
	7 Thailand		Strong
	8 Turkey		Strong
	9 India		Strong
	10 United States		Strong
	11 Indonesia		Strong
	12 Botswana		Strong
	13 Pakistan		Strong
	14 Brazil		Strong
	15 Russia		Strong
	16 Philippines		Strong
	17 Kenya		Strong
	18 South Africa		Strong
	19 Kazakhstan		Weak
	20 Egypt		Weak
	21 Chile		Weak
	22 Colombia		Weak
	23 Ethiopia		Weak
	24 Ghana		Weak
	25 Nigeria		Weak
	26 Mexico		Very weak

Quality Assurance and degree recognition					
Rank / 26	Country	Score / 10	Rating		
	1	Australia		Very strong	
	2	United Kingdom		Very strong	
	3	Germany		Very strong	
	4	Malaysia		Very strong	
	5	Vietnam		Strong	
	6	Philippines		Strong	
	7	South Africa		Strong	
	8	Russia		Weak	
	9	China		Weak	
	10	Kenya		Weak	
	11	Pakistan		Weak	
	12	Kazakhstan		Weak	
	13	Thailand		Weak	
	14	India		Weak	
	15	United States		Weak	
	16	Turkey		Weak	
	17	Botswana		Weak	
	18	Egypt		Weak	
	19	Indonesia		Weak	
	20	Ghana		Weak	
	21	Brazil		Very weak	
	22	Colombia		Very weak	
	23	Ethiopia		Very weak	
	24	Nigeria		Very weak	
	25	Mexico		Very weak	
	26	Chile		Very weak	

Access and sustainability policies

Rank/26	Country	Score / 10	Rating
1	China		Very strong
2	Germany		Very strong
3	Thailand		Very strong
4	Indonesia		Very strong
5	Turkey		Very strong
 6	Colombia		Very strong
7	Malaysia		Very strong
 8	United States		Strong
 9	United Kingdom		Strong
10	Vietnam		Strong
11	Kazakhstan		Strong
12	Russia		Strong
 13	Chile		Strong
 14	Brazil		Strong
15	Pakistan		Strong
 16	Mexico		Strong
17	Egypt		Weak
18	India		Weak
19	Australia		Weak
20	Philippines		Weak
21	South Africa		Weak
22	Nigeria		Weak
23	Ghana		Weak
24	Kenya		Weak
25	Botswana		Weak
26	Ethiopia		Very weak

EMERGING THEMES

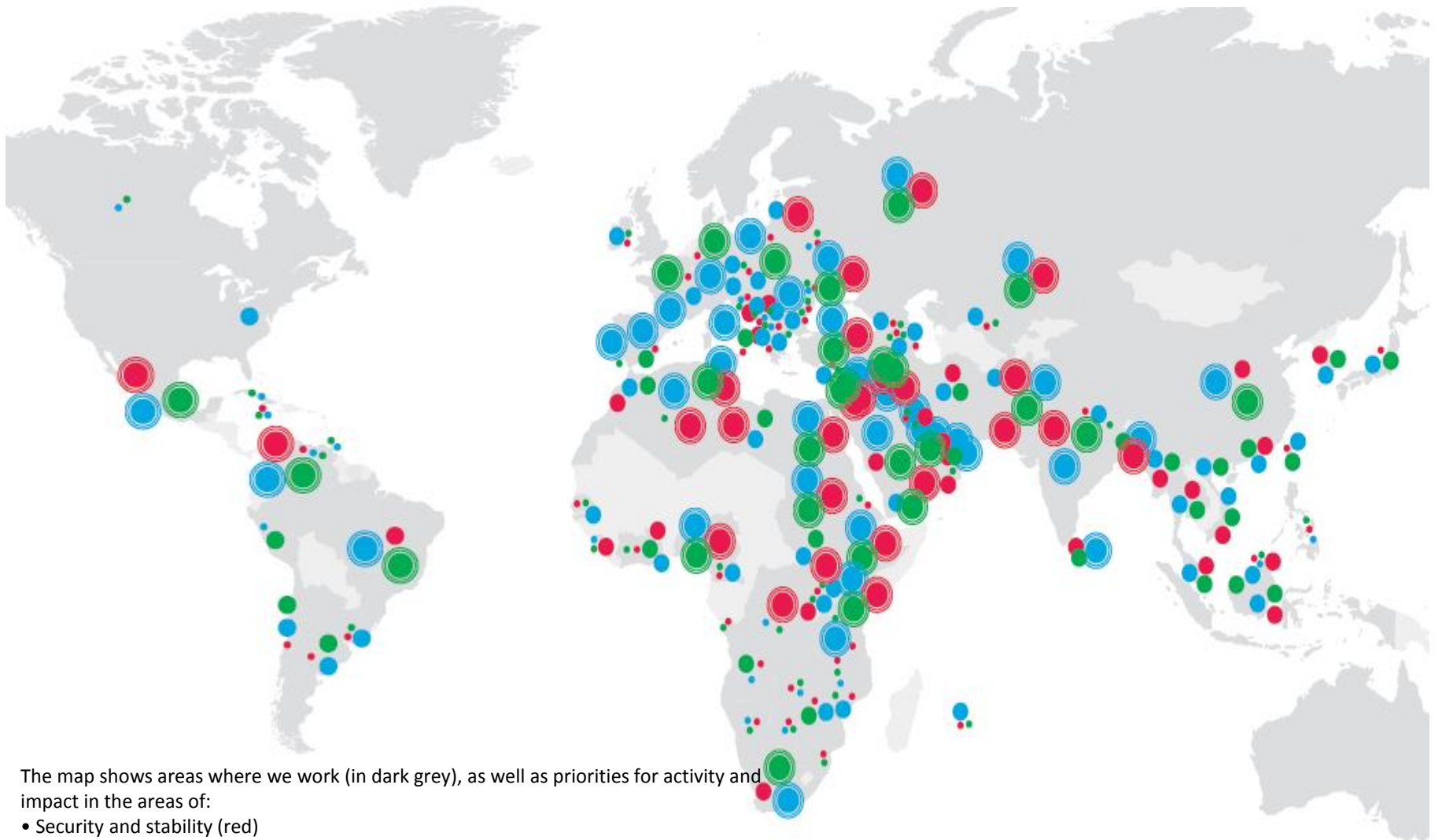
- i. National-level strategies on international higher education;
- ii. Mobility of students; and
- iii. International collaboration in teaching and research.

...commissioned for 2016-2017

OUR WORK IN THE AMERICAS:

Market insight and activity

Maintaining our presence across the world



The map shows areas where we work (in dark grey), as well as priorities for activity and impact in the areas of:

- Security and stability (red)
- Prosperity and development (green)
- Influence and attraction (blue)

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Market insight: CANADA

- ~80% population live within 2 hrs of US
- One of the world's most educated workforces
- Noticeable East-West divide (provinces hold vast power with little interprovincial cooperation)
- R&D spend is 1.6% GDP (=UK) with ~50% from the private sector.
- ~ 50% of R&D done by 5 universities (UT, UM, UBC, McGill, UA)
- Key provider and recipient of TNE in HE, skills and vocational training (US, China, Japan, Qatar, Thailand, India)

Market insight: CANADA

- *Trudeau administration elected with promise to restore & significantly increase science funding*
- Significant increases to clean tech/low carbon spending as part of Mission Innovation (Americas: Canada, USA, Mexico and Brazil)
- Similar research council system
- +50k Canadian students abroad (15% in UK, 2nd to USA)
- Research strengths in a number of areas:
 - Clean tech – CCS, smart grids, renewables & energy efficiency
 - Health & life science – genomics, AMR & neuroscience
 - Unmanned vehicles & aviation
 - Polar research

Market insight and our work: CANADA

OUR WORK in 16-17

Priority: increased collaboration in education, social innovation and science.

- Students for Social Impact (JW McConnell, Trico Foundations, Deshpande Foundation)
- Famelab (NSERC, Discovery)
- SIEM offer focused on DMS, CISCA and Study in UK, Bespoke consultancy, creative industries and study tours
- Science and Innovation Network (SIN)

Market insight: MEXICO

- *EPN's commitment to STI to increase up to 1%*
- Significant increases to clean tech/low carbon spending as part of energy reform (CEMIES, e.g. Edinburgh), and Mission Innovation (Americas: Canada, USA, Mexico and Brazil)
- Newton Fund changing dramatically relations (3 pillars)
- +20k Mexican students abroad (17% in UK, 2nd to USA but 1st for CONACYT-sponsored)
- Education reform: new drive & opps in basic, middle and higher sectors
- Mutual Recognition of Titles, Degrees and Diplomas

Market insight and our work: MEXICO

OUR WORK in 16-17

- Meta-research & TNE: identifying capacity building opportunities in Mexican universities
- ELT: Government-sponsored english students, summer schools in UK
- SIEM offer focused on Exhibitions (DF, MTY, GDL) and DMS
- Newton Fund: RL, IL, STEM, PhD placements, PDE
- Mutual Recognition of Qualifications
- Work with SIN and LATCOP-IU

Market insight: COLOMBIA

- Country transitioning from peace process and constantly + focused in knowledge creation, and accession to OECD (e.g. Medellin as most innovative city in the world 2013)
- Newton Fund delivering on capacity building (people moving to research and translation)
- 22% population with tertiary education vs 14% Brazil
- +20k Colombian students abroad. Strong in PA & USA
- CCYK network (Andes, Nacional, Antioquia, LaSalle, etc)
- Mutual Recognition of Titles, Degrees and Diplomas

Market insight and our work: COLOMBIA

OUR WORK in 16-17

- Supporting the government's strategy for internationalisation: sharing best practice
- ELT: english summer schools in UK, student-paid (Nottingham)
- SIEM offer focused on Exhibitions (BOG, MED, CALI) and DMS
- Newton Fund: RL, IL, STEM, Colombia BIO (10m)
- Mutual Recognition of Qualifications
- Work with SIN and LATCOP-IU

Market insight: BRAZIL

- *A BRIC nation with serious challenges for HE and UK e.g. strong political turmoil, cancellation of SwB, Zika*
- Newton Fund escalated a 'good' to a 'great' relation (people and research, need for more translation)
- $\frac{3}{4}$ tertiary students are in private institutions
- Distance education grew 35% in last 10 years, TNE potential but through local institutions (bureaucracy)
- Home to some of the best Unis in the region (54% share of research output in LATAM)
- +32k Brazilian students abroad (18% in UK, 3rd after USA, Canada and now Germany growing constantly)
- Mutual Recognition of Titles, Degrees and Diplomas

Market insight and our work: BRAZIL

OUR WORK in 16-17

- Researcher Connect: Training early-career researchers
- English training for students (UNESP, SANTANDER open call)
- Famelab (CONFAP)
- UK Alumni awards
- SIEM offer focused on Exhibitions (SP & RIO) and DMS
- Newton Fund: RL (Bilat & Uruguay), IS, Zika, IL
- Mutual Recognition of Qualifications
- Work with SIN and LATCOP-IU

Market insight and our work: CHILE

- Small operation
- Chile leaving the DAC list in December,
- Newton Fund: PDE, RL, IS stopping in December, evolution to a more normal relation
- 8,800 Chileans abroad (7.7% in UK after US, Spain and France)
- SIEM offer focused on single exhibition a year

Market insight and our work: PERU

Priority: support the government's development of its HE sector through quality assurance and internationalisation strategy.

- Peru's HE reform on evaluation, elections next week
- PA-funded: Establishing the framework for UK-Peruvian engagement in Higher Education (HE): governance, leadership and internationalisation
- Capacity building for Network of Peruvian Universities for Internationalization
- No SIEM offer this year

Interested in other markets?

Let us know, we have occasionally responded to requests in e.g. Argentina, Caribbean, Venezuela...

Thank you

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Education Intelligence Update

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GLOBAL EDUCATION TRENDS

ZAINAB MALIK

RESEARCH DIRECTOR

EDUCATION INTELLIGENCE

30 MAY, 2016

ROADMAP

THE BIG PICTURE

WHERE ARE WE NOW?

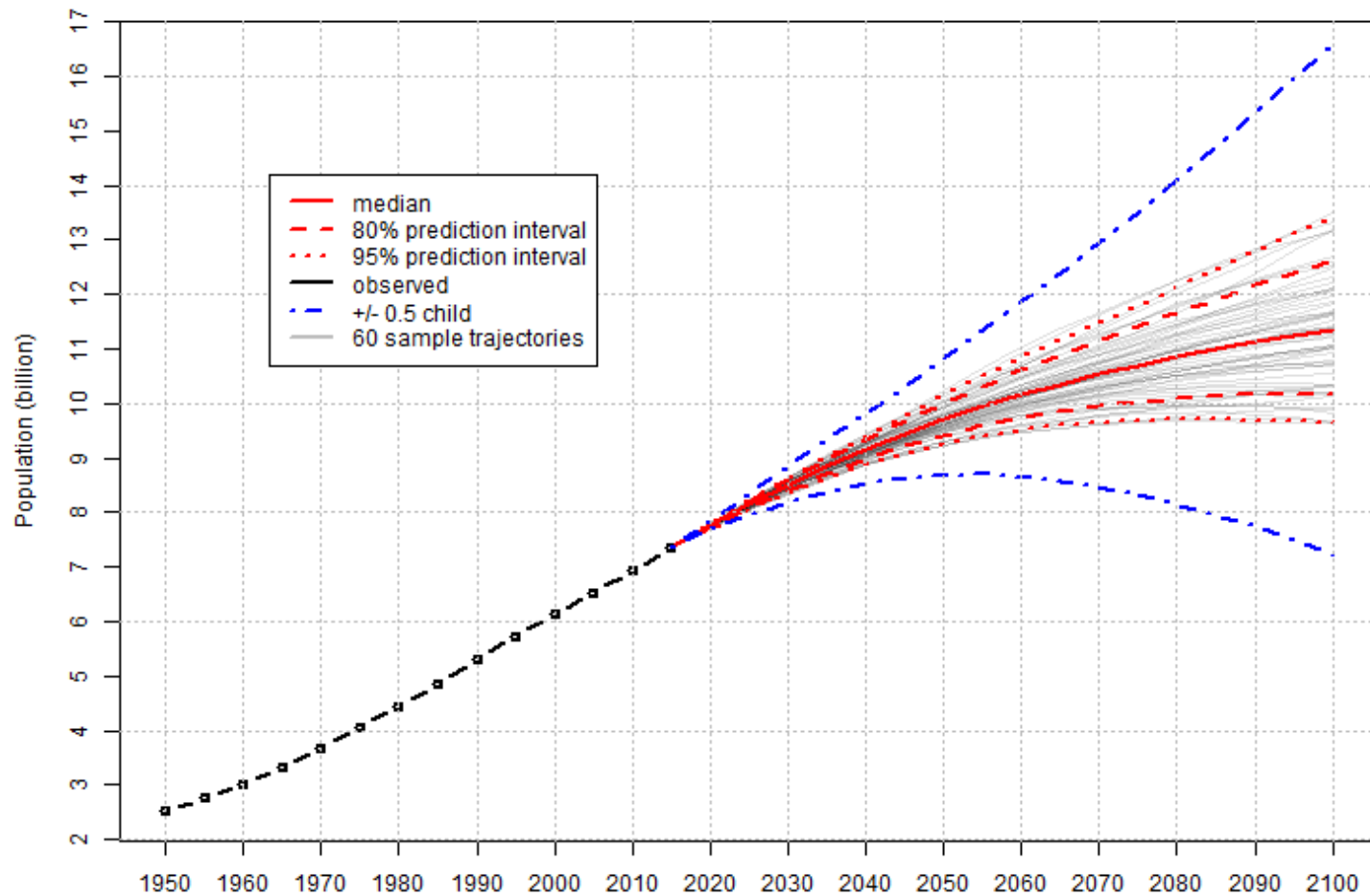
ORIGIN MARKET FORECASTS

COMPETITOR DESTINATION MARKETS

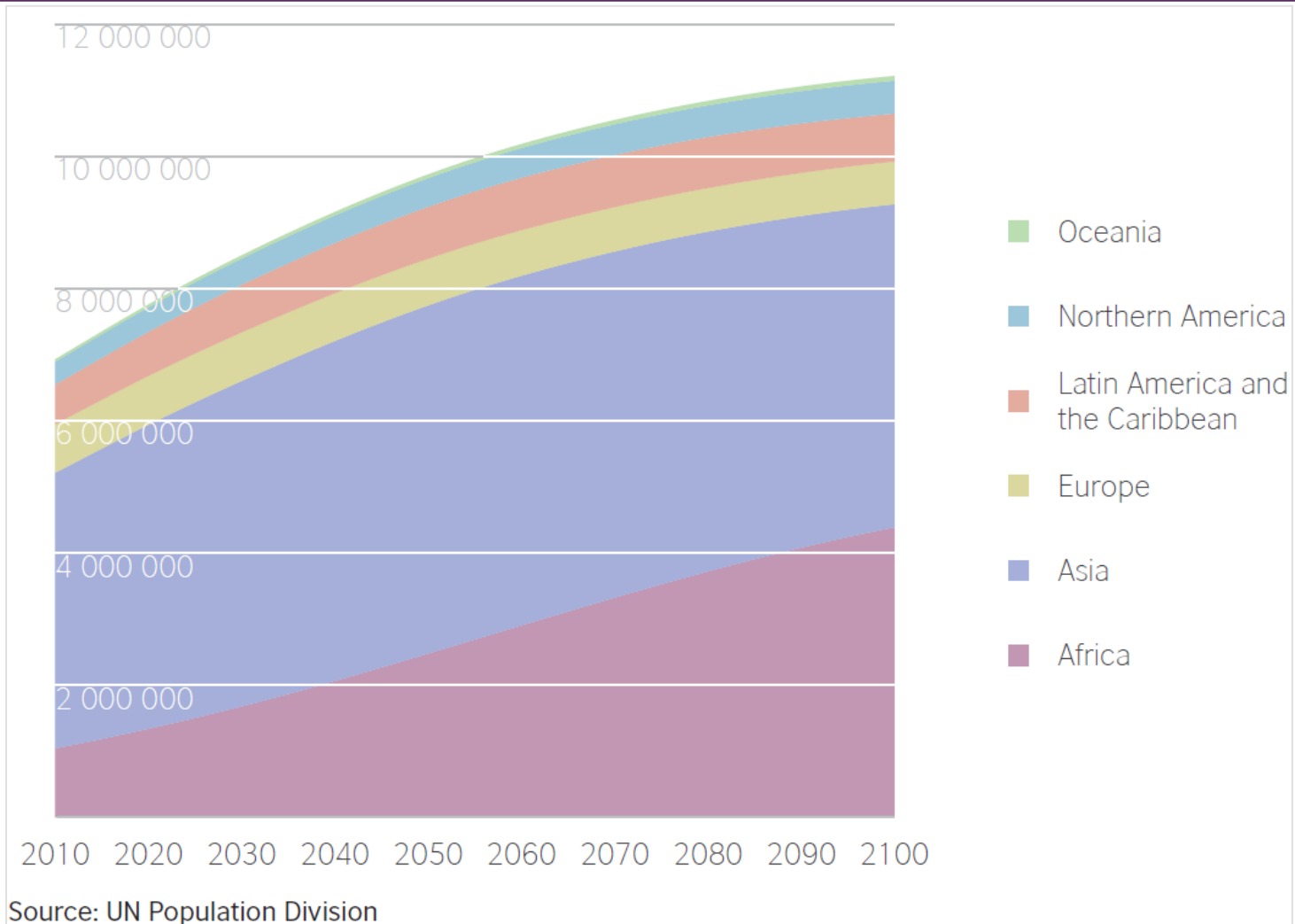
WHAT DOES THIS MEAN?

THE BIG PICTURE

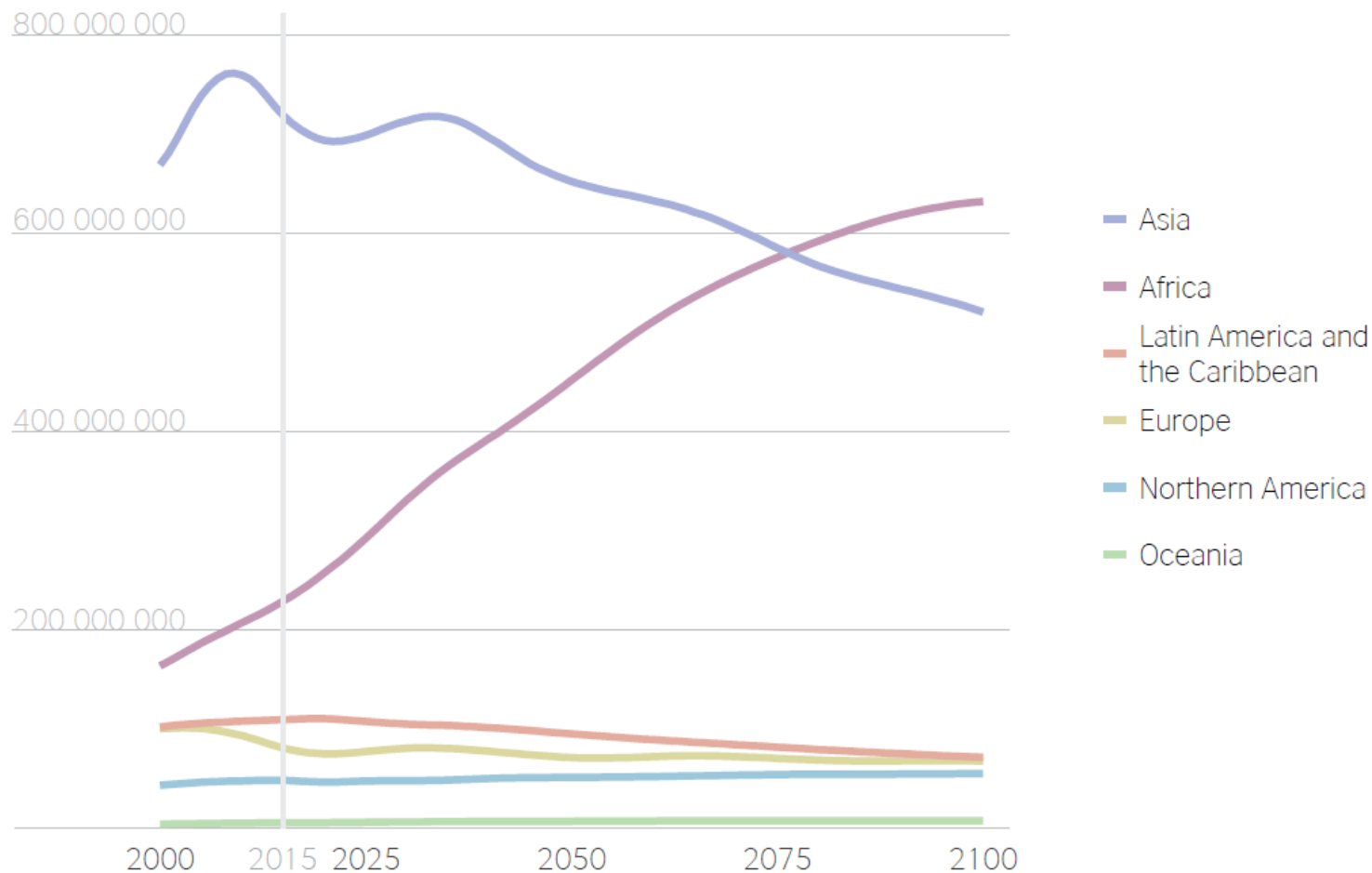
WORLD POPULATION PROSPECTS, THE 2015 REVISION



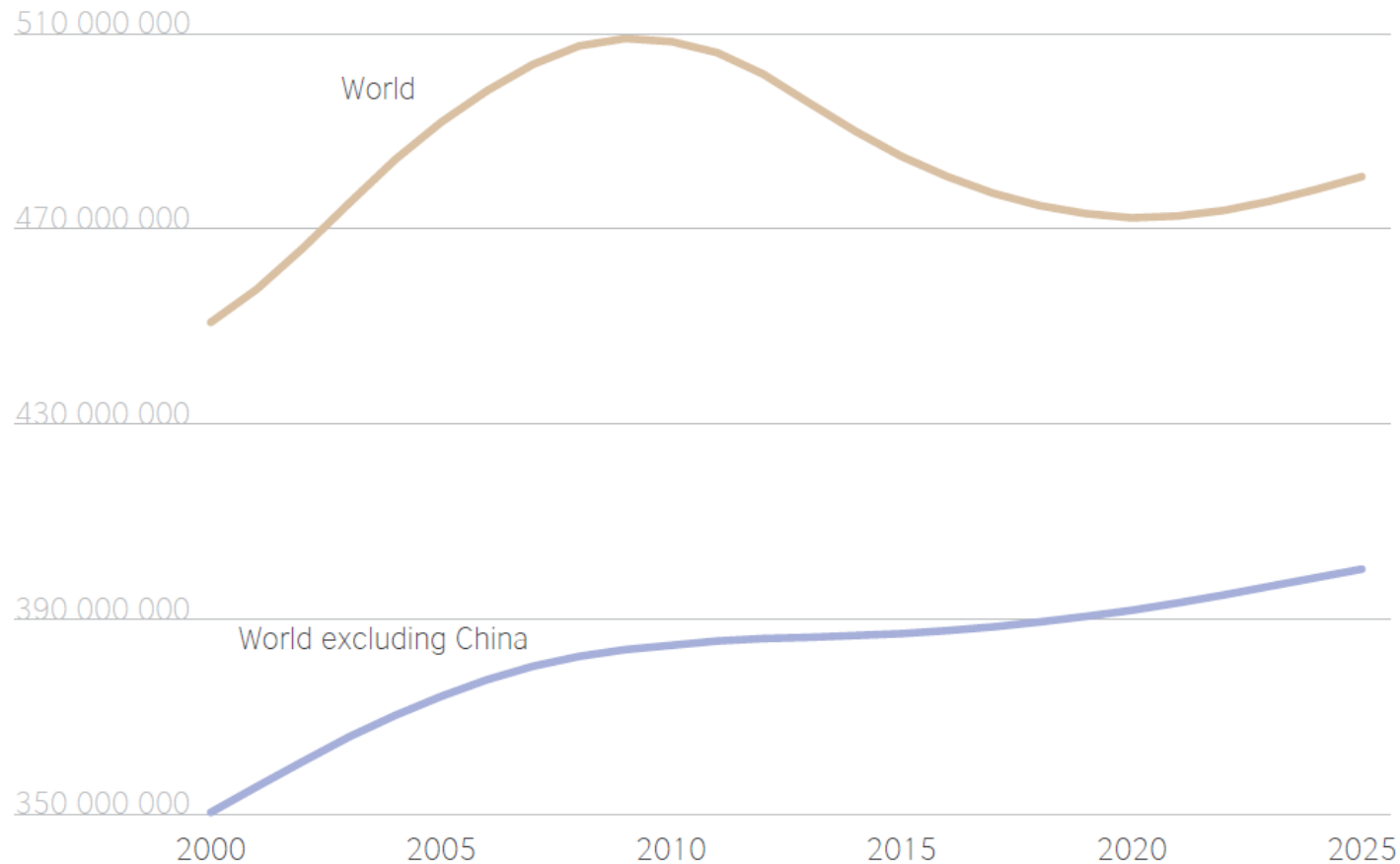
WORLD POPULATION PROSPECTS, THE 2015 REVISION



POPULATION AGED 15-24, BY MAJOR REGIONS



18-22 YEAR OLD POPULATIONS



Source: UN Population Division, British Council

DEMOGRAPHIC TRENDS TO 2025: TERTIARY AGE (18-22) POPULATION GROWTH

Top ten fastest growing 18-22 populations

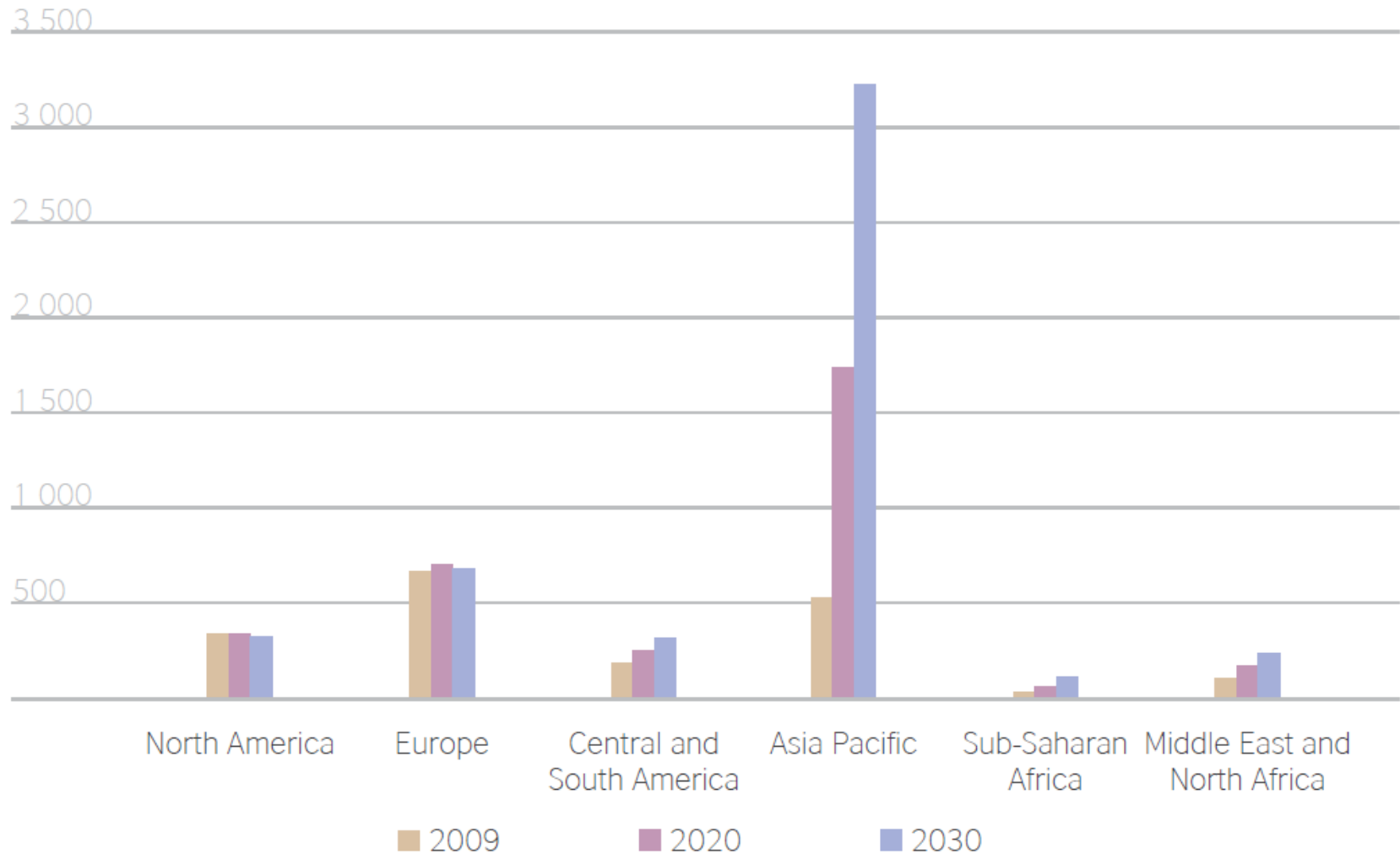
	18-22 population 2012	18-22 population 2025	Change 2012-25
Nigeria	15 759	23 333	7 474
India	115 489	119 451	3 962
Indonesia	20 403	24 064	3 661
Ethiopia	9 318	12 910	3 592
Kenya	4 275	5 945	1 670
Philippines	9 469	10 993	1 524
Iraq	3 222	4 443	1 221
Angola	1 977	3 126	1 149
Pakistan	18 995	19 663	668
Ghana	2 515	3 142	628

DEMOGRAPHIC TRENDS TO 2025: TERTIARY AGE (18-22) POPULATION GROWTH

Top ten fastest declining 18-22 populations

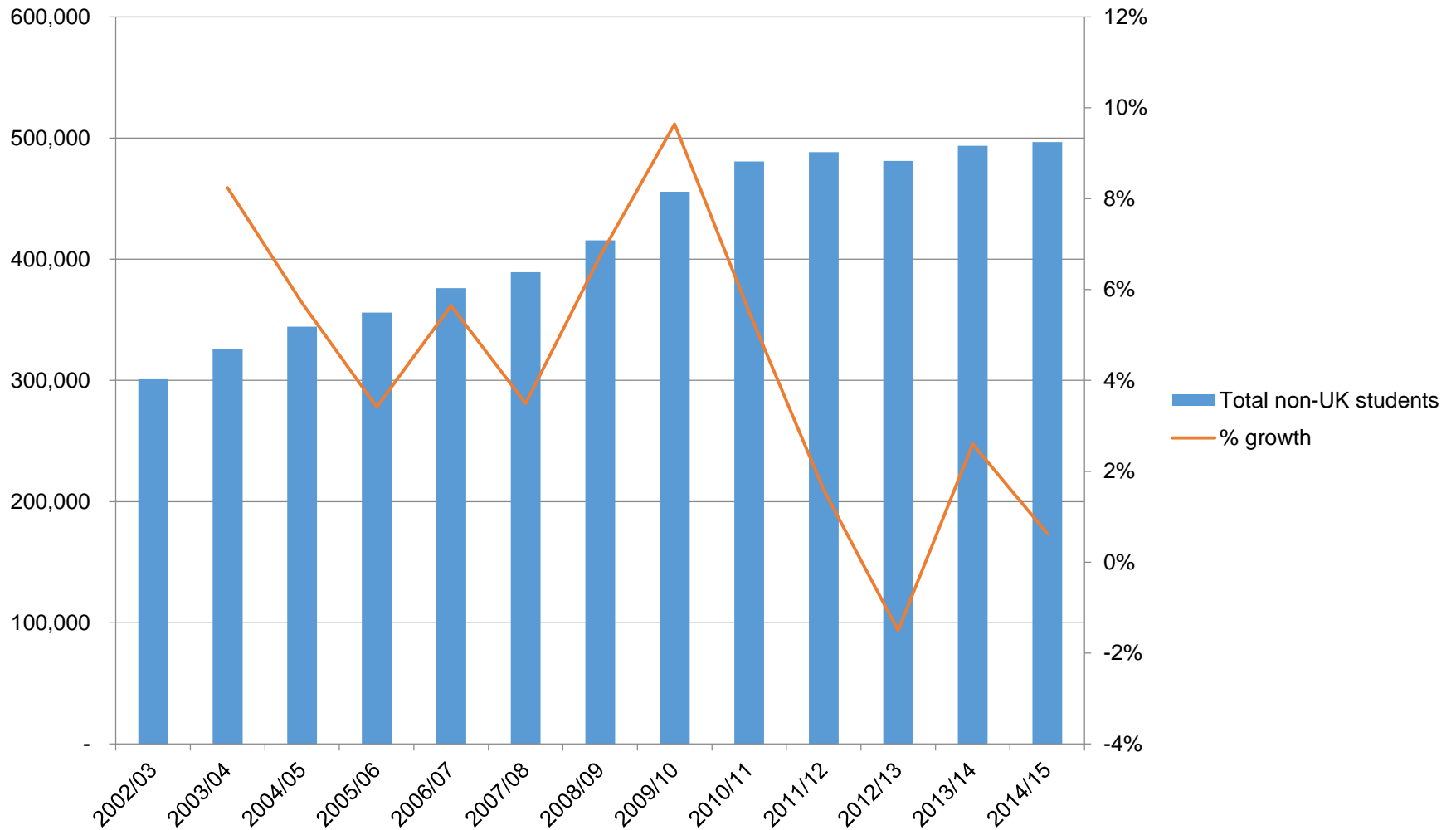
	18-22 population 2012	18-22 population 2025	Change 2012-25
Poland	2 555	1 833	-721
Japan	6 298	5 570	-729
Thailand	4 663	3 909	-754
Germany	4 550	3 708	-843
South Korea	3 331	2 407	-923
Ukraine	3 054	2 066	-988
Iran	7 566	5 844	-1 721
Vietnam	8 739	6 845	-1 894
Russia	9 868	7 547	-2 321
China	115 560	80 388	-35 171

GROWTH IN HOUSEHOLD WEALTH



WHERE ARE WE NOW?

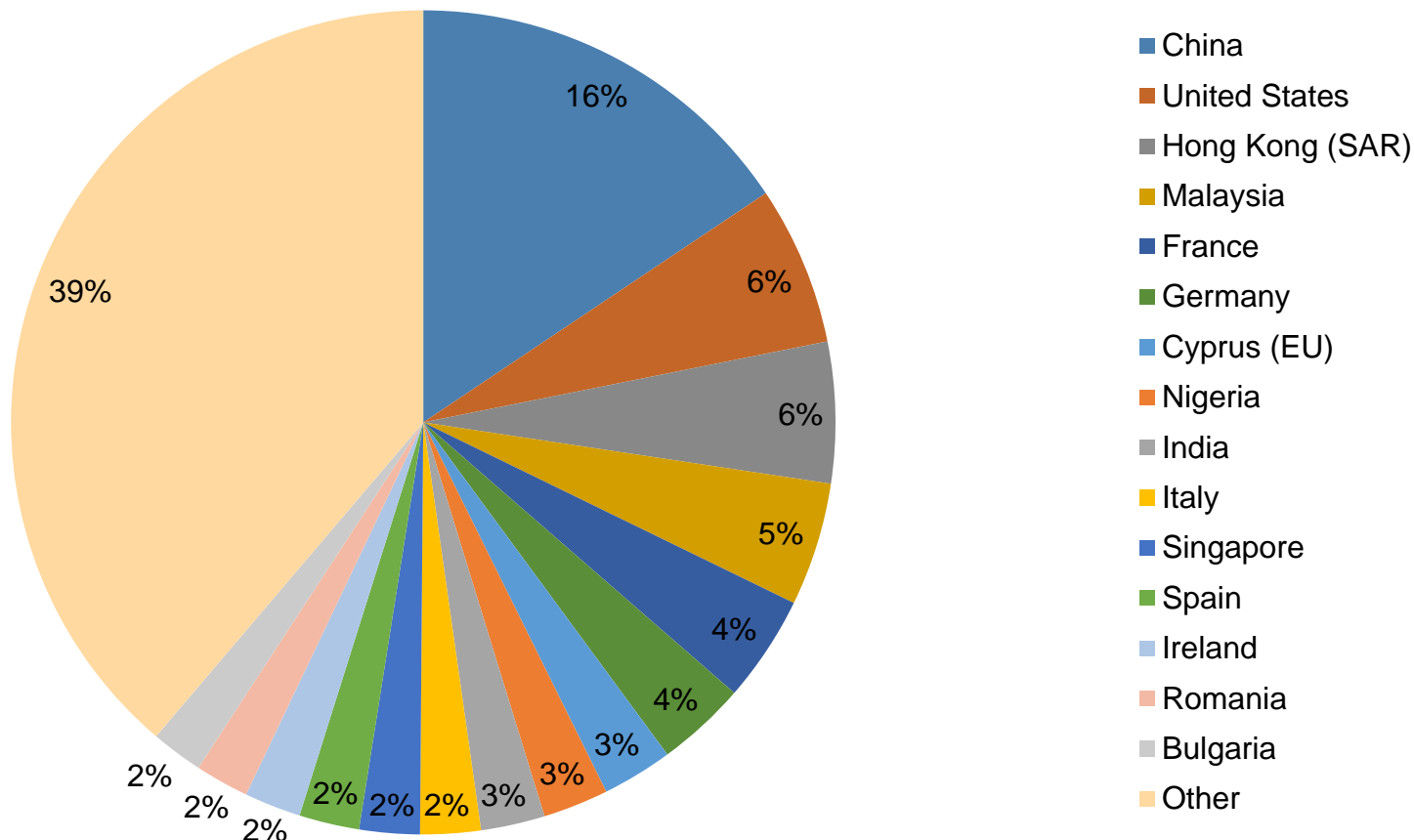
TOTAL INTERNATIONAL ENROLMENTS



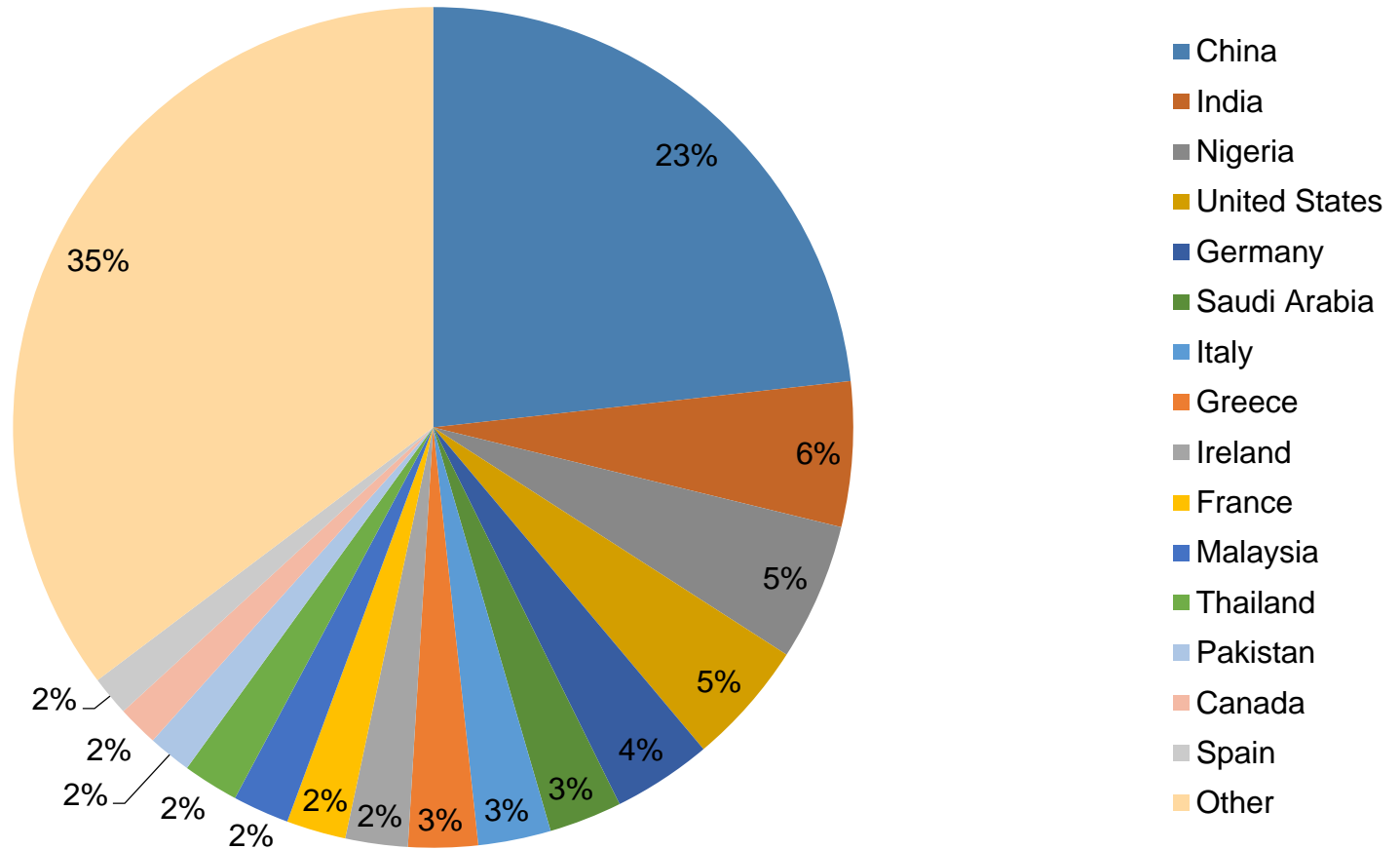
TOP ORIGIN COUNTRIES, 2014/15

	Total enrolments in UK HEIs	Per cent of total international enrolments	Per cent growth from 2013/14	Per cent growth 2012/13 to 2013/14
China	94,995	19%	2%	5%
United States	27,650	6%	3%	6%
India	19,485	4%	-7%	-12%
Nigeria	18,950	4%	-1%	4%
Germany	18,135	4%	-3%	-2%
Malaysia	17,945	4%	3%	9%
Hong Kong (SAR)	16,965	3%	10%	13%
France	16,430	3%	1%	-1%
Italy	12,745	3%	9%	12%
Ireland	11,430	2%	-5%	-8%
Greece	11,030	2%	-5%	-3%
Spain	9,825	2%	3%	5%
Cyprus (EU)	9,795	2%	-4%	-4%
Saudi Arabia	9,740	2%	-2%	-2%
Singapore	7,820	2%	7%	12%
Canada	7,750	2%	-2%	3%

TOP ORIGIN COUNTRIES, 2014/15, UG



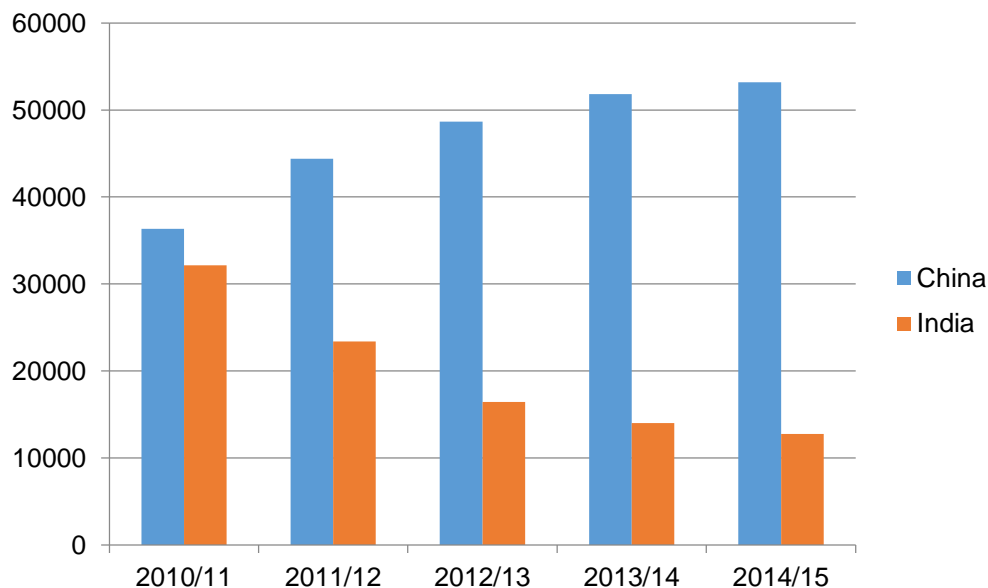
TOP ORIGIN COUNTRIES, 2014/15, PG



POSTGRADUATES SINCE 2010/2011

- In 2014/15 there were 8,100 fewer international postgraduate students in the UK as compared to 2010/2011

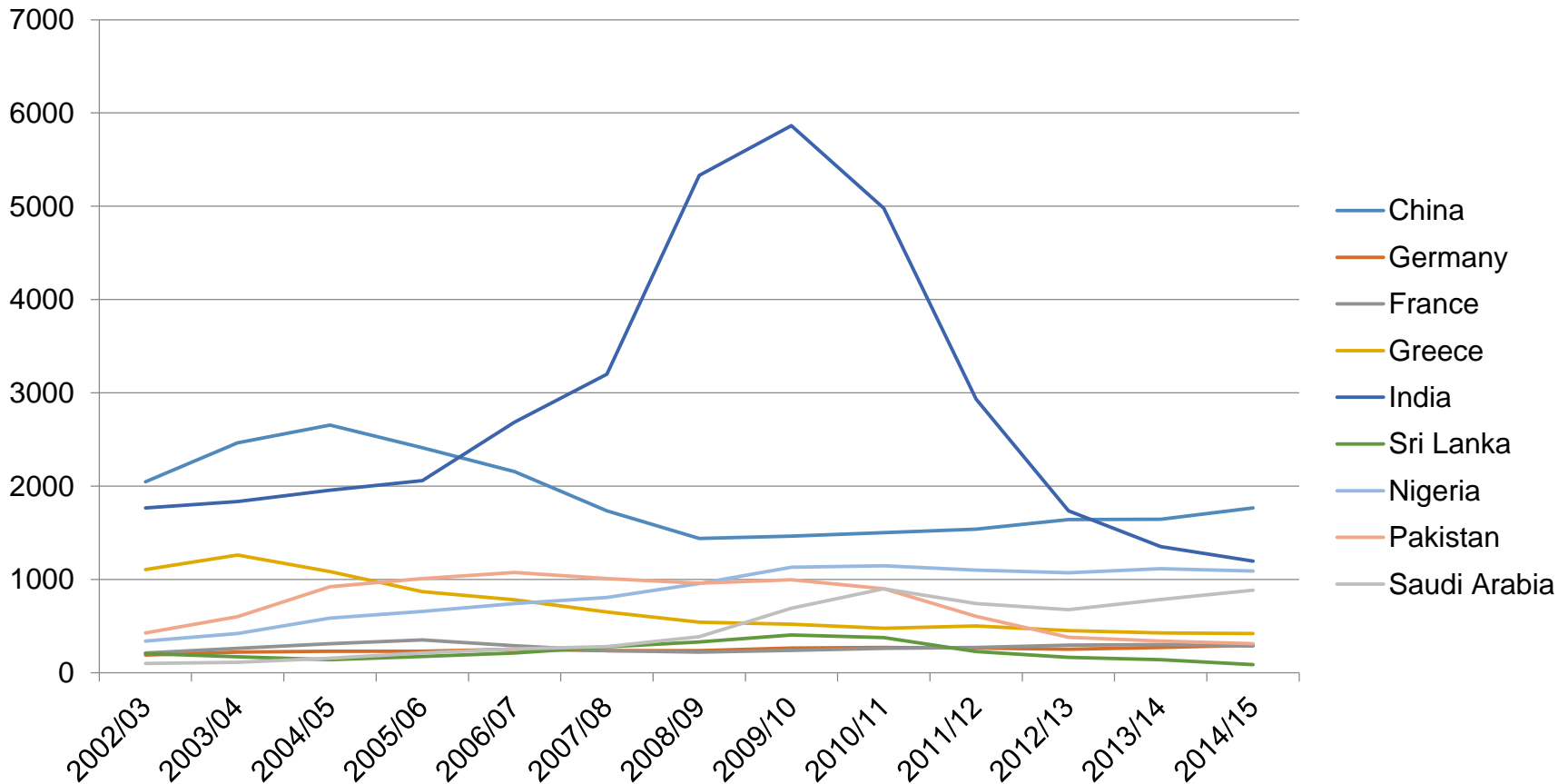
Ecuador	293%	India	-60%
Iraq	246%	Pakistan	-49%
Indonesia	111%	Sri Lanka	-47%
Burma	105%	Syria	-45%



China	16,825
Iraq	1,990
Italy	1,550
Indonesia	1,035
India	-19,405
Pakistan	-3,610
Ireland	-2,445
Greece	-1,480

PG COMPUTER SCIENCE

- Computer science (-5,845), education (-1,000) and engineering and technology (-1,000) saw the highest decrease in international PG enrolments from 2009/10 to 2014/15



INTERNATIONAL ENROLMENTS

- Total Indian students have halved since 2009/2010 and Pakistani student numbers down 37%
- Indian students rising in the US (29% since 2010) and other competitor destination countries

- Slowdown in enrolments not indicative of overall market
- Growth coming from TNE hosts, 'fragile states', scholarship countries

ORIGIN MARKET FORECASTS

OUTBOUND STUDENTS BY ORIGIN, 2012 AND 2025

2012 China

India

Germany

South Korea

France

Turkey

Italy

2025 China

India

Nigeria

Germany

Saudi Arabia

France

Turkey

OUTWARD MOBILITY POLICIES



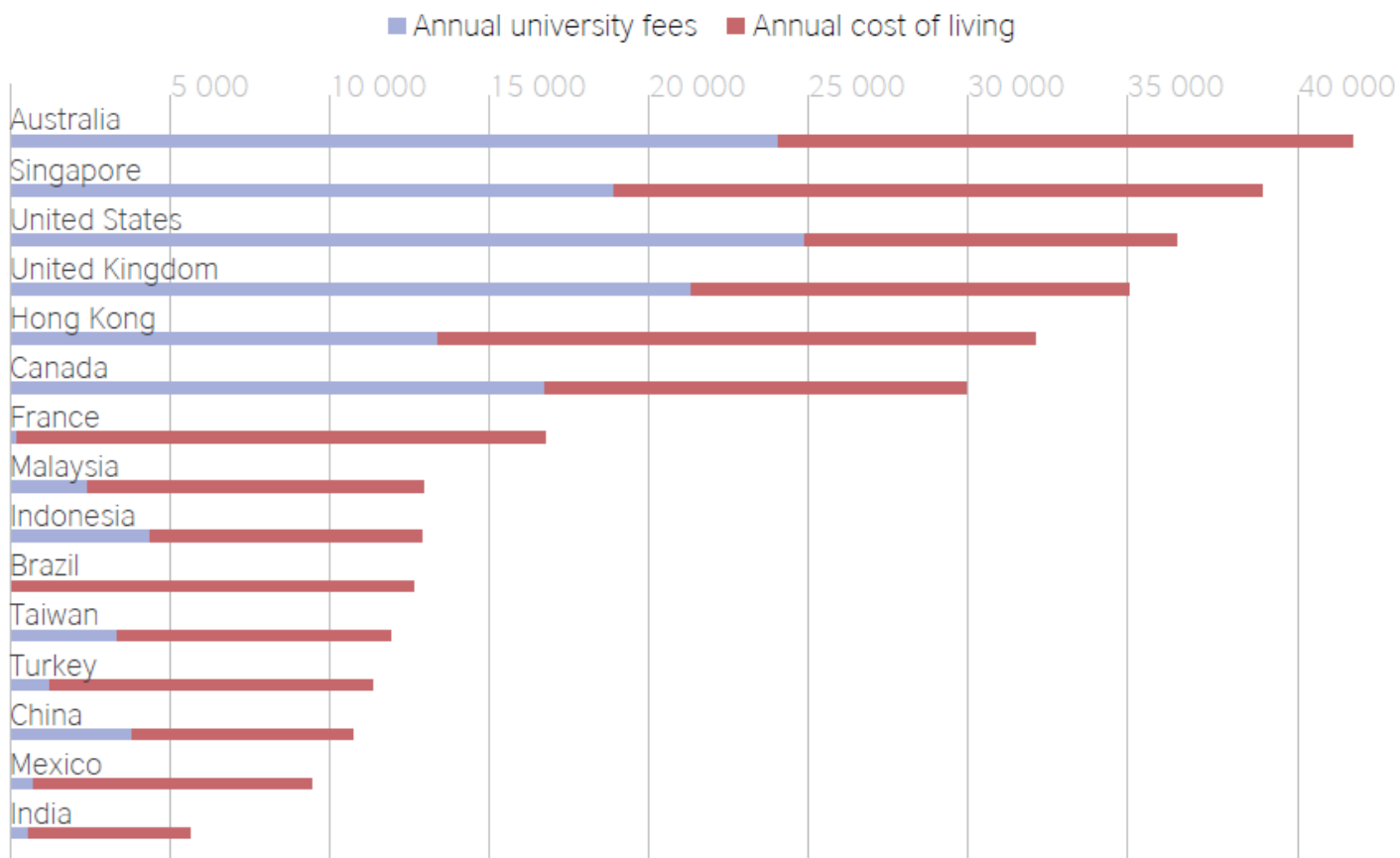
UK Strategy for Outward Mobility

COMPETITOR DESTINATION MARKETS

MARKET SHARE DECREASING

- The UK has seen decreases in its global market share of international students
- From 2013/2014 to 2014/15, the US saw 10% growth, Australia 8% growth, Canada 11% growth, and Germany 7% growth
- More 'traditional sending countries' (Malaysia, China, UAE) are hosting higher numbers of international students
- Internationalisation mobility initiatives globally
- Southern African Development Community (SADC)
- ASEAN - Common Space of Higher Education in Southeast Asia

COST OF EDUCATION



Source: HSBC

Note: HSBC collected costs based on tuition fees for the top ten universities in each country as well as cost of living estimates from online site Expatistan.

COMPETITOR STRATEGIES

The US

- Education USA runs scholarship programmes and overseas promotion of US education through 400+ Education USA centres
- Individual states and institutions also run marketing campaigns
- Graduates of non-STEM subjects are eligible for 1 year of post-study work, while most STEM graduates can extend this for a further 24 months

Australia

- New draft strategy (2015) to develop competitiveness in visas and PSW programmes
- Goal to attract 1 million international students and 10 million offshore students within the next ten years
- Streamlined visa processes
- Graduates who have studied in Australia for at least 2 years are eligible for work visas, from 1.5 to 4 years, depending on level of qualification

Canada

- Double international student enrolment to 450,000 by 2022
- Students who have completed a degree course lasting two years or more are eligible for a 3 year post-graduation work permit, while those who have studied for less than 2 years are entitled to a permit for the same amount of time as their course
- Permanent residence in Canada requires only one year of full-time Canadian work experience in a technical, professional or managerial role

COMPETITOR STRATEGIES

New Zealand

- Attract 143,000 international students by 2025
- Streamlined visa processes
- Graduates are eligible for a 1 year PSW visa if the job is related to their field, they are eligible for a further 2-year PSW visa (3 years total) or 3 years for graduates working towards membership in certain professional organisations (4 years total)
- PSW is a pathway to permanent residency

China

- Host 500,000 international students by 2020
- Chinese government scholarships for foreign students
- Expanded work opportunities for foreign students
- Foreign students can obtain short-term internships and international students studying in Beijing universities can take part-time jobs or become entrepreneurs

Japan

- Aims to attract 300,000 international students in 2020
- Strengthening English-language proficiency among Japanese students and increasing number of degree programmes in English
- “Generous post-study work” options

WHAT DOES THIS MEAN?

GLOBAL STUDENT MOBILITY



WHY DO YOU WANT TO COME TO OUR UNIVERSITY?

19. Why do you wish to come to Harvard? (The Committee will expect a careful answer to this question.)

The reasons that I have for wishing to go to Harvard are several. I feel that Harvard can give me a better background and a better liberal education than any other university. I have always wanted to go there, as I have felt that it is not just another college, but is a university with something definite to offer. Then to, I would like to go to the same college as my father. To be a "Harvard man" is an enviable distinction, and one that I sincerely hope I shall attain.

Date April 23, 1955

Signature John F. Kennedy



UK'S UVP

- Diverse
- Culture & travel
- Efficient & high performing
- Affordable
- Shorter programmes
- Highly-recommended
- High-quality education
- Institutional autonomy
- Scope of internationalisation
- Research and innovation
- Employability



THANK YOU!

Please don't hesitate to contact the Education Intelligence team!

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For information on our subscription and research:

<https://siem.britishcouncil.org/news/opportunities/education-intelligence-annual-subscription-2016-17>

UK Visas and Immigration

Drew Chen

Clearance Officer

UK Visas and Immigration



Home Office

**UK Visas and Immigration
British Council Market briefing
NAFSA, Denver**

May 2016

Drew Chen

UK Visas and Immigration, New York



#dontbelateforclass

Two decision making centres in the Americas, New York that covers applications made in Canada, North America and the Caribbean. Bogota covers Central and South America.

- Customer demand remains strong. The New York DMC processed 114,500 applications across 2015, an increase of 14% on 2014. This includes a 4% increase in Tier 4 General Student cases. In New York, 99% of all Tier 4 applications are successful.
- We have increased access and service options for customers via the Premium Application Centres (PACs) operated by our commercial supplier, VFS. Centres now available in New York, Los Angeles and Washington, with more planned. We have introduced an “on demand” service where we can provide biometric clinics for large groups.
- Some changes have been made to the immigration rules that will affect students. Most notably the removal of an English Language requirement for Third Country National students in the United States who are undertaking a Study Abroad course in the UK for less than 6 months.



Students – two main routes

- **Tier 4 students**

The Tier 4 (General) category is for adult students who want to come to or remain in the UK for their post-16 education. It is the appropriate route for any student who is intending to remain in the UK for more than 6 months or for any study abroad students who intend to do any work whilst studying in the UK (includes all work paid or unpaid eg work placements, internships or voluntary work)

- **Short term students**

Courses of six months or less

Intend to study at an acceptable institution or as part of an overseas degree course

Do not want to work or undertake a course-related work placement

Do not intend extend their stay in the UK

British Council USA Updates

Qu Ting Zheng
Education Coordinator
British Council USA

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Americas

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Education Marketing activities

Undergraduate

- ✓ Texas
- ✓ California
- ✓ Chicago
- ✓ Mid-Atlantic
- ✓ Northeast
- ✓ NACAC National Conference
- ✓ Counselor tour

Alumni Relations

- ✓ Education UK Alumni Awards & Gala
- ✓ Bespoke Events in New York and Washington DC
- ✓ Alumni relations pilot program in NY

Postgraduate Taught

- ✓ Creative Industries Digital Campaign
- ✓ Business School Road Show

Study Abroad & Exchange

- ✓ NAFSA
- ✓ Generation Study Abroad

GREAT alumni series



Education is GREAT Britain Pavilion (Booth 1258)



Education is GREAT Britain Pavilion (Booth 1258)



**Study in
Scotland**

**Study in
Wales**

BUTEX

15
**University
Exhibitors**

300+
**UK
Attendees**

2
UK Sessions

NAFSA 2017 deadlines

Theme: Expanding Community Strengthening Connections

- Session and workshop proposal
Deadline: 8 August 2016
- Poster fair proposal
Deadline: 12 December 2016
- More details: [Call For Proposal](#) and SIEM website updates

Exhibiting:

Open now for Global Partners

July 18 for general exhibitors

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