

British Council G20+

Americas

7 October 2020

Agenda today

- Cancel, defer or travel?
- Messages students need to hear
- Funding for students
- Markets of growth (and decline)

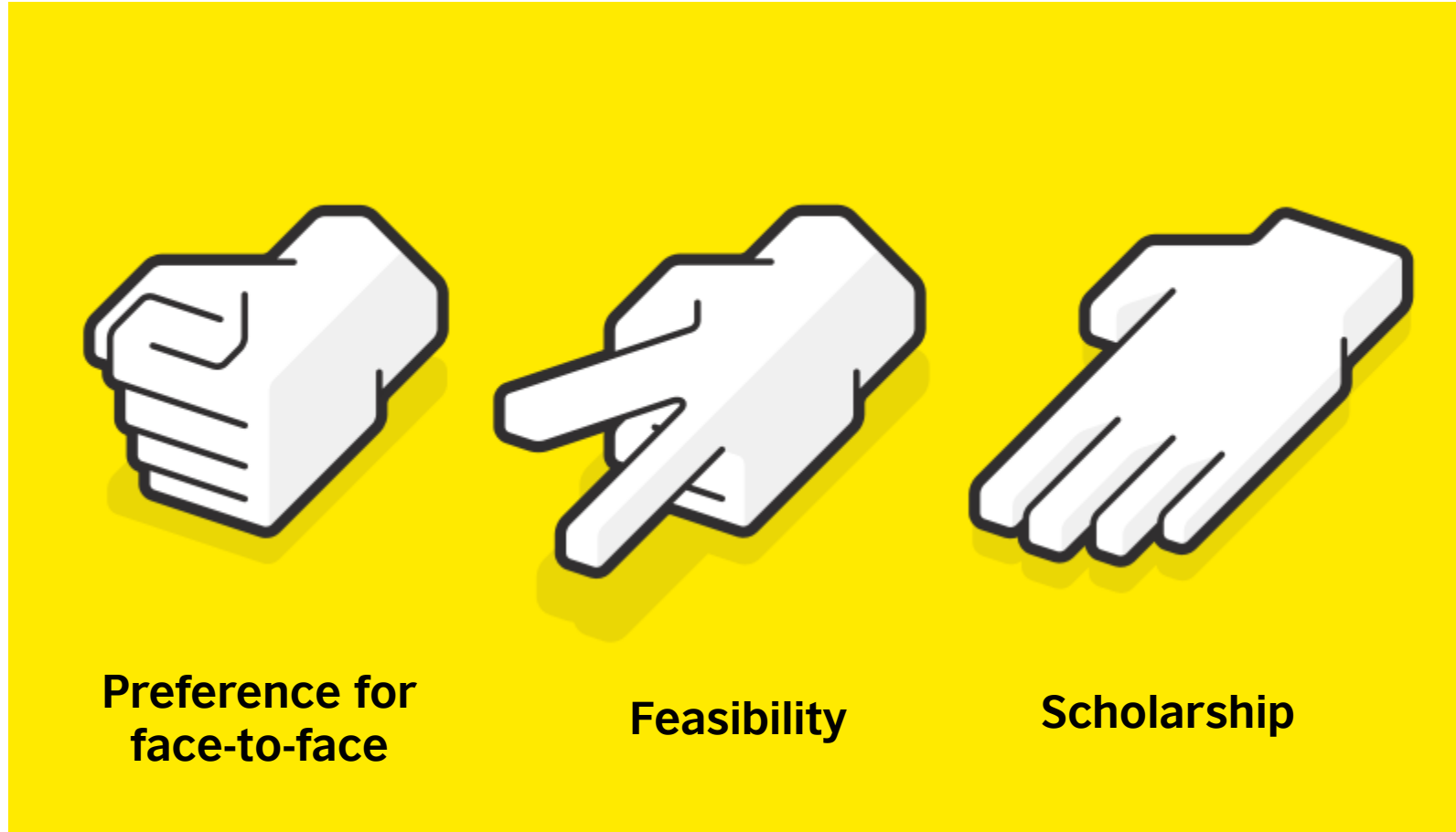
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Cancel, defer, or travel?



Preference for face-to-face

“Students aren’t thrilled by the idea of studying online. They want to study IN the UK” – Colombian Agent

In Peru, pre-pandemic, online teaching was even restricted at HE level.

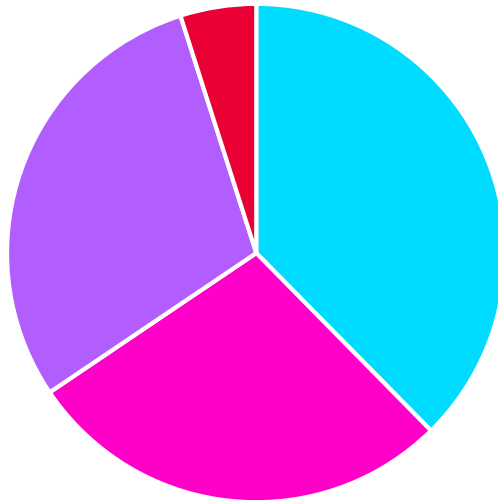
Just 15% of Brazilian students would want to start course online in Brazil

Although 38% would start online in destination country.

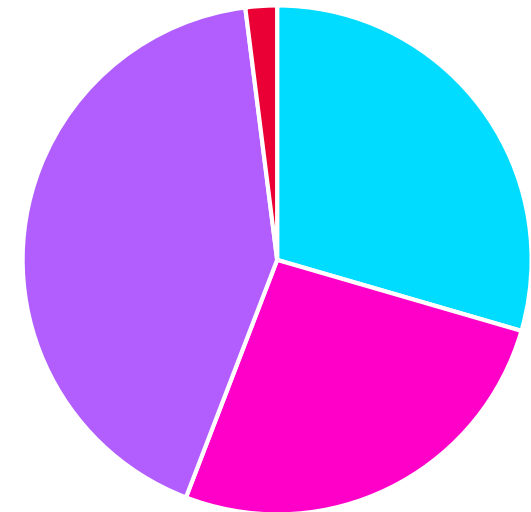
Preference for face-to-face

Preference if unable to start course abroad in September

UG applicants



PG applicants



- 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

Survey of over 4,000 students from Brazil, Mexico, Colombia and Peru

Feasibility



 VFS.GLOBAL

Temporary closure of all UK Visa Application Centres

Owing to the ongoing Coronavirus (COVID-19) developments, please be advised that our UK Visa Application Centres will not be accepting any visa applications for processing until further notice.

Kindly visit our website (www.vfsglobal.com) or the Embassy website for any further updates.



Feasibility

Colombia – limited international flights from 21st Sept

Peru – limited international flights from Oct 5th

Chile – no international flights

Argentina – no flights

26 agosto 2020

Reapertura del Centro de Solicitud de
Visas del Reino Unido en Lima

09 September 2020

A pa
rean

News

UK Visa Application Centres in Brazil
are open

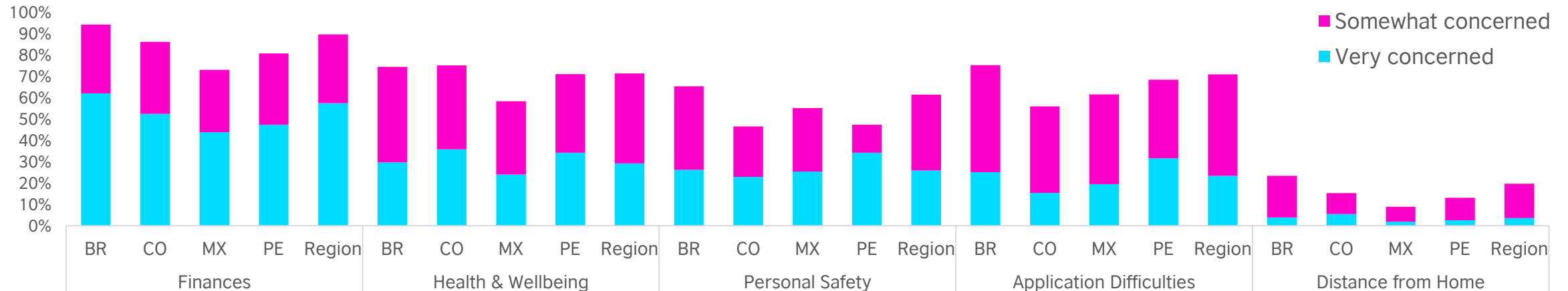
Scholarship/Funding

“If a student gets funding, then they are much less likely to defer, regardless of whether classes will start online in destination country or not.”

Student concerns

- Applicants' main concern in each Latin American country is not health but finance.
- Application difficulties are also an important issue for applicants from all Latin American countries, while distance from home is not a major concern.






Concern about specific issues relating to overseas study (UK applicants)



Student concerns

Perception of the UK's handling of Coronavirus isn't great...

Student concerns

	 Austrália	 Canadá	 EUA	 N. Zelândia	 Reino Unido
Competente nos protocolos de controle da pandemia	63,5%	72,2%	25,5%	75,7%	41,6%
Seguro, em termos sanitários, para a recepção dos estudantes internacionais em um futuro próximo (2020-2)	58,2%	70,9%	32,7%	71,3%	44,6%
Dispõe de infraestrutura acadêmica adequada para a recepção dos estudantes internacionais em um futuro próximo	58,2%	79,3%	52,2%	66,5%	52,6%
Dispõe de recursos tecnológicos ajustados às exigências de aulas em formato híbrido (on-line + presencial)	59,4%	78,7%	67,1%	64,7%	59,4%

Messages to influence students

- Graduate route
- Employability/industrial placement/networking
- Soft skills
- Scholarships/finances
- Health and Safety
- Teaching methods (f2f, blended, online – what's the balance?)

Funding for students in the region

- No news from Brazil
- Bad news from Chile
- Good(ish) news from Colombia
- Great news from Peru

Funding for students in the region - Chile

NACIONAL

Los puntos ciegos de la suspensión de Becas Chile

El Ministerio de Ciencia celebró su primera convocatoria 2021 del mayor programa de becas. Las críticas son amplias.

Nacional

Sábado 03 octubre de 2020 | 22:29

Comunidad académica se muestra preocupada por suspensión a convocatoria de Becas Chile 2021

Por Nicolás Parra

La información es de María Palma

Graves consecuencias

por Carolina Cuéllar, Carmen Gloria Zúñiga, María Paz González y Dalku A

Senador Girardi criticó la suspensión de Becas Chile: Es matar el futuro del país

Publicado: Sabado, 3 de Octubre de 2020 a las 08:52 hrs. | Fuente: Cooperativa

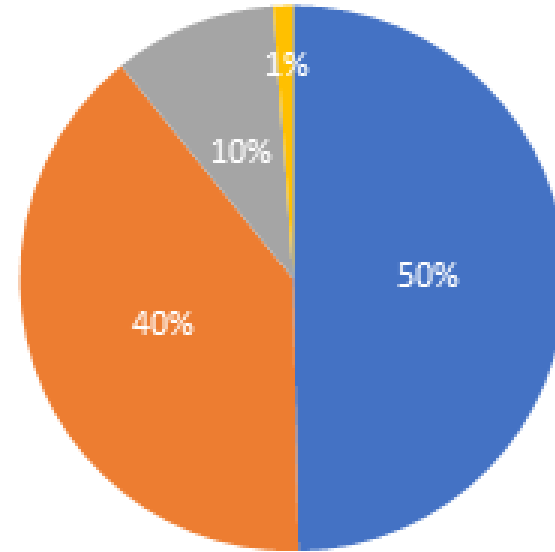
Funding for students in the region - Colombia



Colfuturo
2021 budget
is secure

Chevening
significantly
reduced for
2021

Funding for students in the region - Peru



- I would only go if I get a scholarship
- Using my savings
- My parents or relatives would pay for it
- Other

A further note on Peru...

- **Significant investment into Public HE Sector – PMESUT**
- **National Scholarship scheme to keep students in HE**
- **UK selected as Peru's delivery partner to rebuild crucial facilities, such as schools and hospitals, which were affected by El Niño in 2017 in Peru**

Markets seeing growth (and decline)

When asked, agents and scholarship bodies across the region all reported growth in the UK as a study destination for university-level study.

Markets seeing growth (and decline)

	PG				UG			
	2016/17	2017/18	2018/19	Trend	2016/17	2017/18	2018/19	Trend
Argentina	195	230	245	26%	100	125	150	50%
Brazil	1610	1590	1475	-8%	535	610	615	15%
Canada	3205	3245	3515	10%	4415	4615	4770	8%
Chile	955	970	1030	8%	170	145	205	21%
Colombia	920	875	870	-5%	225	225	210	-7%
Ecuador	345	335	340	-1%	220	275	265	20%
Mexico	2170	2025	2145	-1%	460	480	540	17%
Peru	300	360	330	10%	130	155	190	46%
USA	11,115	11,830	12,175	10%	17,135	17,815	18,475	8%

Top subject choices (Latin America)

Business & administrative studies

Social studies

Engineering & technology

Physical sciences

Biological sciences

Creative arts & design

Law

Computer science*

Government priorities:

Social entrepreneurship

Industry 4.0

Engineering

Energy

Creative Industries

What can UK institutions do?

- **Focus on employability / industrial placement / networking for students**
- **Focus on niche offers that align with Americas' governments priorities (especially for post-covid)**
- **Capitalise on students' desire for 'full experience'**
- **Scholarships/finances**
- **Be flexible on entry requirements**

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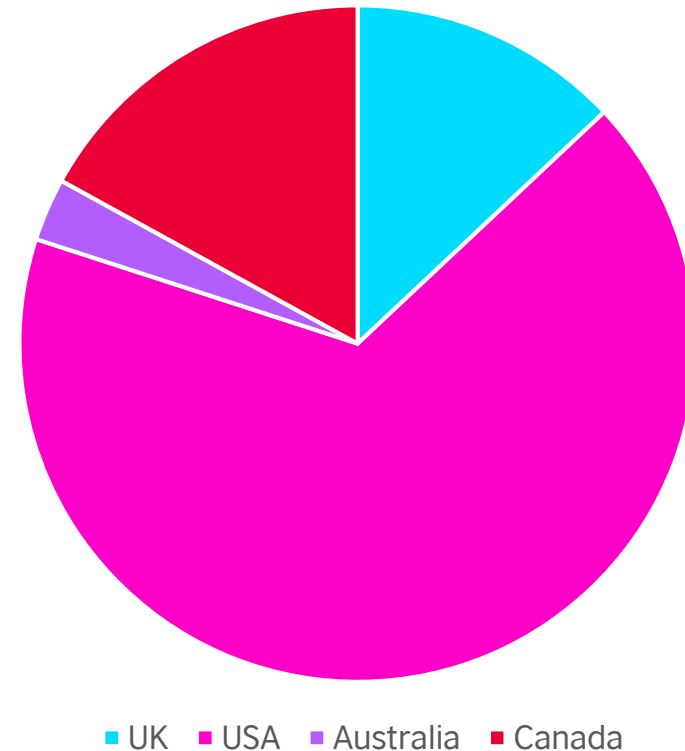
Americas/Mexico

7 October 2020

Key Market Indicators

- **GDP per capita:** US\$11,026 (2019)² (ranked 90th in the world)
- **Outbound students** totaled nearly **34,900** in 2019 according to UNESCO
- **Total enrolment in tertiary education** in the 2017-18 academic year was reported at **3.86 million**, in 2000 it was about 1.98 million

UK Market Share (Student Visa Issuances)



Changes on PGT Market

- Self-funded students considered deferring their admission for a year
- Health considerations i.e. how the pandemic is being handled played a role in the decision-making process
- **Exchange rate:** Mexican peso has been negatively impacted by the crisis $\approx 20\%$



Changes on PGT Market

- **Funding**

- No changes on funded amount
- Changes on application process are expected to remain, i.e. documentation delivered online and accepting e-signatures.
- Great Scholarship

- **Programme Delivery**

- Funding institutions agreed to include programmes which due to the pandemic have decided to deliver the first part of the course remotely
- No official changes on funding policies regarding f-2-f vs remotely delivered programmes, however there is more flexibility on a case by case basis

Prospective PG Students



- Recent graduates, from private universities mostly
- Working professionals seeking an international experience
- **Important regions to consider:**
 - North: Nuevo Leon (Monterrey)
 - Central: Querétaro (Querétaro City), Guanajuato (León), Jalisco (Guadalajara), Puebla (Puebla City) and Mexico City
 - South: Yucatán (Mérida)
- Important investment for education in different areas such as farming technology, sustainability, IT development, health, energy, etc.

Communications with PGT Market

- **Channels:**
 - Social media, including LinkedIn
 - Webinars on specific topics
 - Education agencies and ELT schools
 - Active Alumni network
- **Important messages to communicate:**
 - Health and safety
 - Post-study work visa
 - UK Universities' competitive advantages over european countries with no tuition fees

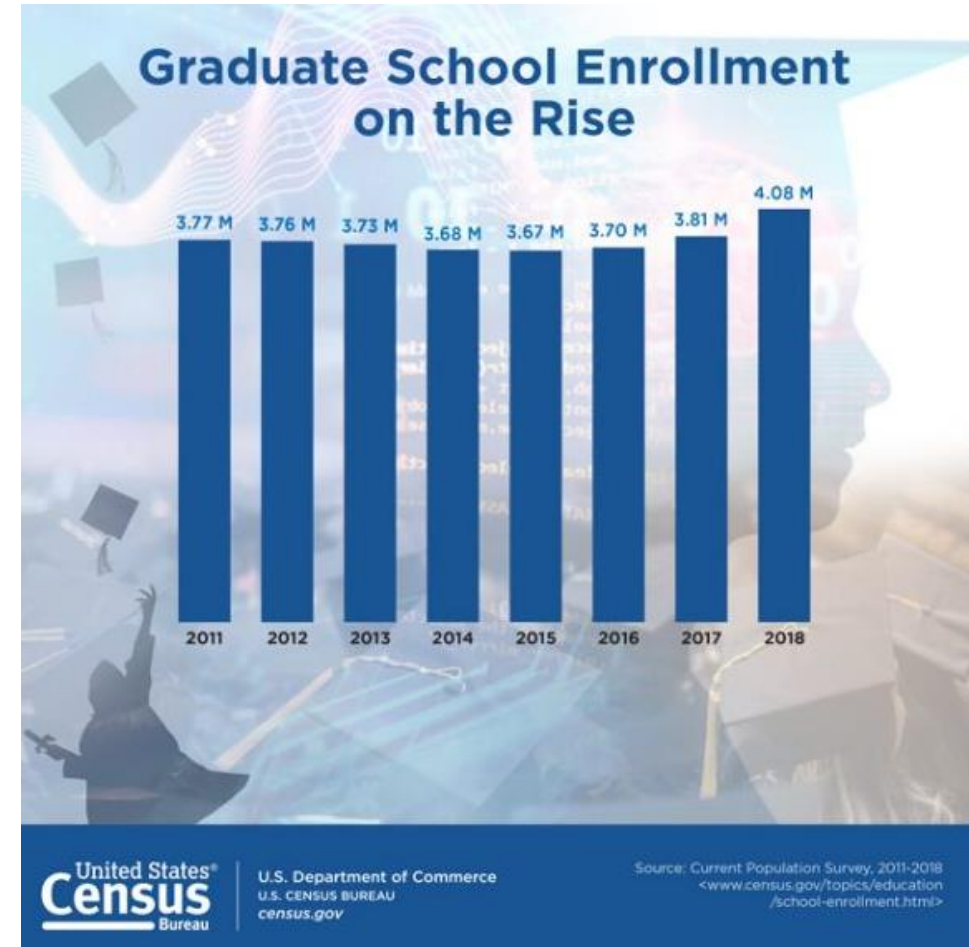
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7 October 2020

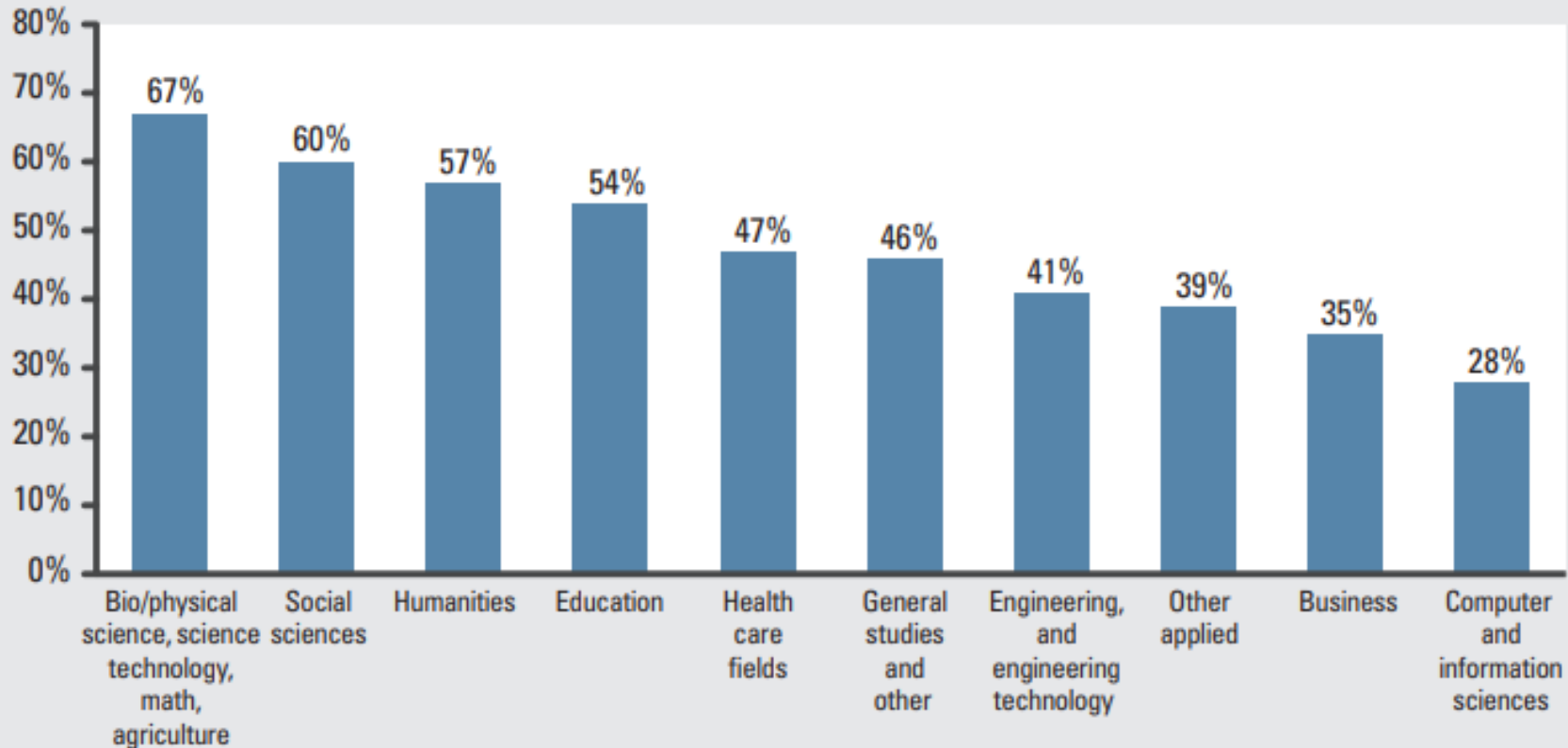
Graduate students in the US

- A total of 533,974 graduate students enrolled for the first time in graduate certificate, education specialist, master's, or research doctoral programs in Fall 2018
- Graduate student enrolment in the US has continued to increase, despite declines in undergraduate enrolment
- Average age of Master's students = 33 years old
- Largest fields: Business, Education, Health Sciences



Who are the prospective postgraduate students?

Figure 4: Percentage of 2007–08 Bachelor's Degree Recipients Enrolled in a Graduate Program as of 2012 by Undergraduate Major

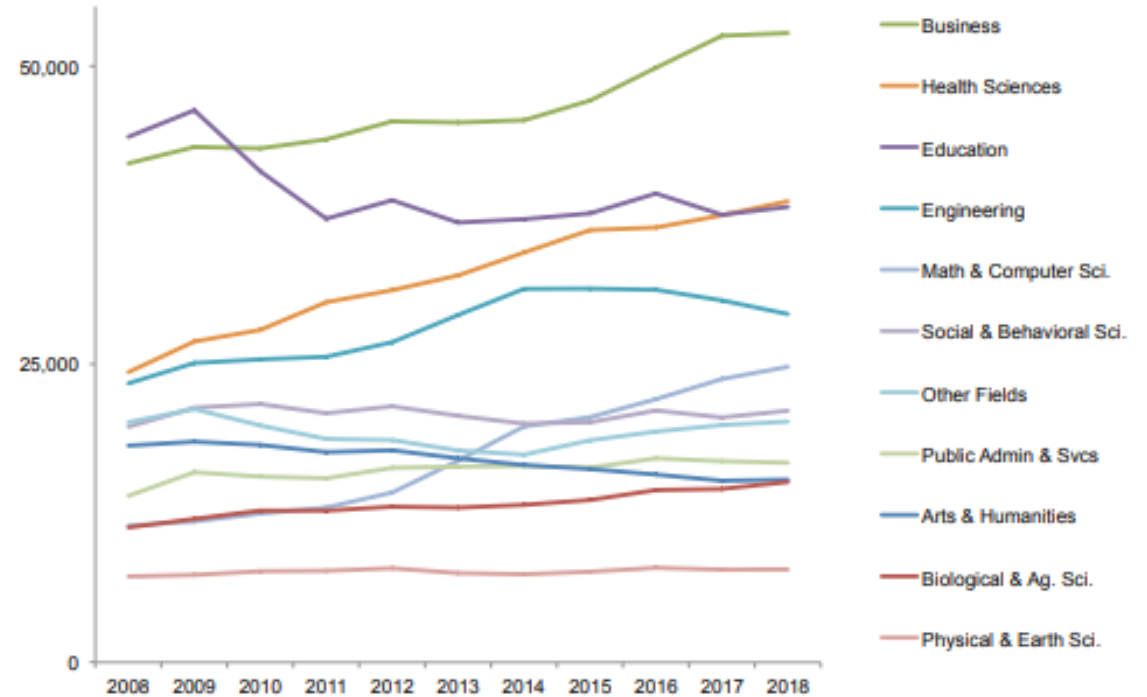


Source: NCES, Baccalaureate and Beyond Longitudinal Study, 2008 and 2012, PowerStats.

Graduate students in the US

- Fastest growing graduate degrees = Mathematics and computer sciences, business, health sciences and agricultural sciences
- According to Indeed.com, the most in-demand graduate degrees from employers as of August 2020 are: Business administration, Healthcare administration, Engineering, Computer and information sciences, Nurse anesthesia, Human resources management, Physician assistant and Math

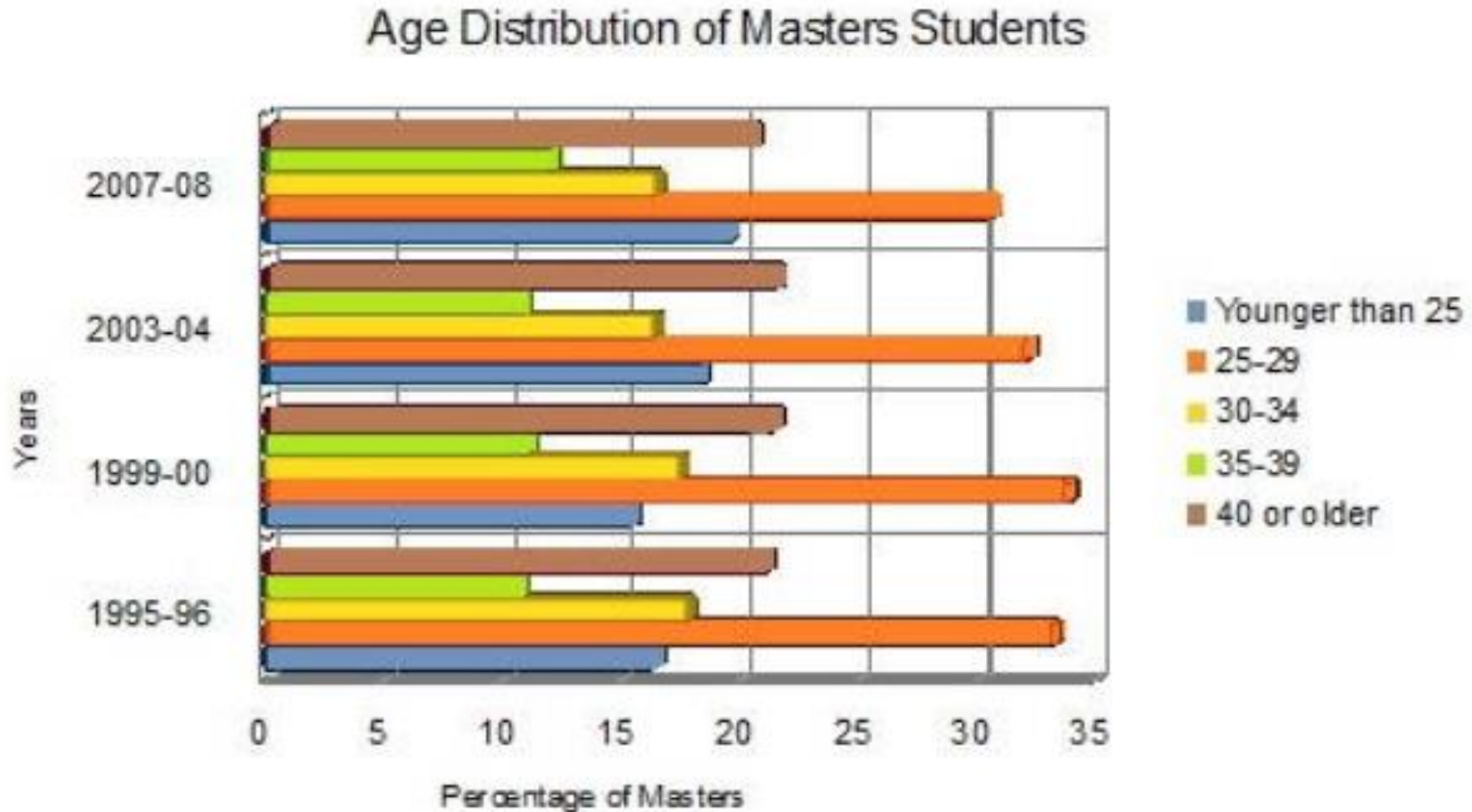
Figure 7. Trends in first-time graduate enrollment by field of study, Fall 2008 to Fall 2018



Note: Trends were developed based upon institutions that provided data for all years 2008 to 2018; therefore, the numbers of first-time enrollments do not match data in the tables.

Source: CGS/GRE Survey of Graduate Enrollment and Degrees

Graduate students in the US

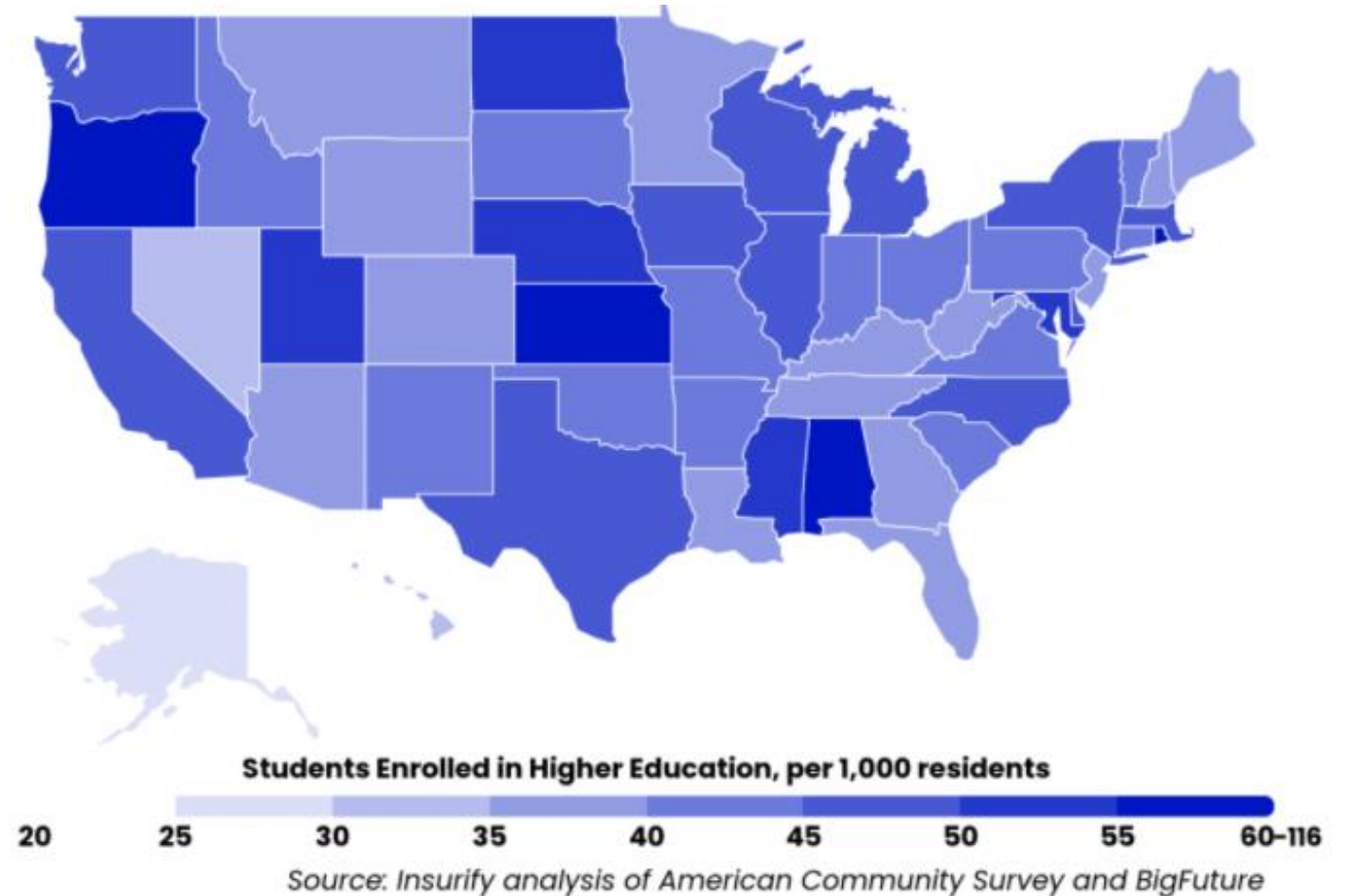


Source: National Center for Education Statistics, Profile of Graduate and First-Professional Students: Trends from Selected Years, 1995-96 to 2007-08

Where are the prospective postgraduate students?

States with most postsecondary students enrolled:

- California
- Texas
- New York
- Florida
- Illinois
- Pennsylvania
- Ohio
- Arizona



Labour market trends

Discouraging factors in graduate applications:

- an economy in which undergrad degree-holders can make significant five-figure incomes at entry-level jobs
- reports of stagnation and low pay in some fields, even with a graduate degree (especially humanities)
- reports of stagnation in high school graduation rates
- wariness of accruing large amounts of student debt

Encouraging factors in graduate applications:

- devaluation of undergraduate degree and Master's degree becoming industry standard
- increase in earning potential
- need to upskill/reskill
- graduate students can borrow Direct Plus Loans through Federal Student Aid
- expected rise in graduate applications due to economic recession

Channels to reach students

From Arizona State University – Best Practices for Successful Graduate Recruitment

- Buy GRE or GMAT test names and reach out
- Advertise your degree programs to undergraduates in related disciplines
- Recognize the unique characteristics of underrepresented students. Create distinctive campaigns and use regional and national databases
- Help faculty and students be effective recruiters. Develop tools such as a PowerPoint presentation about your program that they can show at conferences at other universities.
- Creating visible, accessible websites
- Social media advertisements
- Student video testimonials
- Visibility in high traffic areas (including public transportation),
- Hosting receptions at professional conferences
- Targeted mailings
- Telephone calls or text messaging campaigns

Recruitment ideas during Covid-19

From Andrea R. Solomon, vice dean at Columbia University's Graduate School of Arts and Sciences

Communications:

- For prospective and accepted students: frequent messaging
- Updates on planned events and any value added to master's programs during Covid-19 pandemic
- Host panel or lecture with faculty in field and invite prospective students
- Short videos of program directors and/or faculty talking to incoming students

Community:

- For students who accept offer: survey (whereabouts; goals; fun facts and interests)
- Hold meetings and town halls to have students meet each other, to air concerns, to ask questions
- If program has many students, have follow-up meetings with smaller groups, led by faculty, current students, and/or alumni

Recruitment ideas during Covid-19

From Andrea R. Solomon, vice dean at Columbia University's Graduate School of Arts and Sciences

Momentum:

- For students who accept offer provide a summer reading list
- Help focus on a project, paper, research method, or tool they can employ upon starting in the fall
- Develop new or expanded social-media presence using Twitter or LinkedIn
- Develop pre-orientation materials or pre-orientation class online

Virtual information sessions:

- In addition to adapting to Covid-19, can also help institutions with addressing accessibility to information
- Student ambassadors – different targeted days (e.g. women in engineering)

“How do we make sure that if students do decide to postpone going to graduate school for a year, we don’t lose contact with them and we continue to remain connected and to encourage them to enter graduate programs at a later date?”

-Suzanne T. Ortega, president of the Council of Graduate Schools

Market characteristics



Students start thinking about graduate school early = Start recruitment early



Student consumer attitudes = responses to enquiries are expected within 24 hours



Year-round cycles = Make sure your website *never* has extended downtime during perceived “low” times of year

How the market is changing

- Covid-19 is emphasizing existing issues in HE such as declining opportunities in academia
- Sense of destabilization in the US and anti-immigrant rhetoric – negative impacts on international student enrolments – pipeline to graduate degrees will be impacted
- Colleges that have announced spring plans are mostly sticking to their delivery mode from the fall
- Covid-19 and its economic spillovers have hit hardest low-income students, as well as those who are Black, Hispanic, and Native American

“Overcommunication is the word of the summer.”

-Lisa Garcia Bedolla, Vice Provost for Graduate Studies and Dean of the Graduate Division at the University of California, Berkeley

“What did your department do during the Covid pandemic?’ should be a question that the prospective applicants ask now for the next decade.”

-Andrew Needham, Director of Graduate Studies, New York University’s History Department

Key messages for US audiences

Covid-19

- Reassure students who have had interruptions and changes to their education (e.g. no GPA for spring 2020 semester)
- Provide a space in application for applicants to describe their individual experience
- US institutions have urged programs not to use GRE – inequities inherent in requiring it
- Health and safety measures

Alumni and professional networks

Employability

Shorter time to degree

Finances

Social justice

“We can’t ignore racial injustices as we prepare for recruitment.”

“We’re a little afraid to address the topics. Students are upset because people are not addressing the topics.”

“We’re calling on all colleagues to be what we’re calling diversity, equity and inclusion experts at this time so that we are creating the best inclusive excellence environment for our students.”

-Damon L. Williams, Assistant Dean, Diversity & Inclusion, Northwestern University

- Reflect your institution’s diversity on website and in programming

G20+ Summit Americas Session

Thank you for joining, this session has now ended.

International Education Services