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MARKET NEWS BULLETIN

23 August – 12 September

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UK

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'Phantom' students skew migration data

By Judith Burns: BBC News: 6th September 2016

The government might be targeting "phantom students" in its efforts to control migration, a study suggests.

The number of non-EU migrants who come to the UK to study but remain five years later could be about half that ministers claim, say researchers.

The "current self-destructive policy is deterring genuine international students", says the Institute for Public Policy Research.

Ministers say it is crucial to crack down on immigration abuse.

Ministers say official statistics suggest that each year about 91,000 non-EU students do not leave the UK at the end of their studies.

This figure is an extrapolation of data from the International Passenger Survey (IPS) carried out annually by the Home Office on a sample of travellers at UK ports, says the IPPR.

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Nigeria's continued forex woes curb UK study, agencies report

By Sara Custer: The Pie News: 22nd August 2016

While the weaker British pound might make studying in the UK more attractive to some international students, the country's third most fruitful source market is still struggling with punishing exchange rates, that have plagued the market for a number of months.

Reports from Nigeria say interest in studying higher education overseas has dropped by 30-50% for most education agencies compared to this time last year as the naira stubbornly stays at .002 to the dollar.

"Our major problem is the exchange rate for pounds and dollars," Rose Omonubi, president of the Association of UK Certified Agents in Nigeria told The PIE News. "The exchange rate is affecting some parents' decision especially at A level foundation, because local schools say 'stay, and do the foundation here'."

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USA and Canada

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US ELT providers reporting enrolment declines this year

By ICEF Monitor staff: ICEF Monitor: 24th August 2016

- *Intensive English Programmes in the US are reporting significant enrolment declines this year, particularly in the wake of cutbacks to the Saudi scholarship programme and challenging market conditions in other important source markets such as Brazil*
- *Programme directors are now actively working to develop new source markets for English studies in the US, and are also placing a renewed emphasis on new programme development, including for junior students*
- *US IEPs are also planning to expand their work with international agents and other partners and to make greater use of online channels for student recruitment*

Intensive English Programmes (IEPs) across the US are experiencing deep declines in enrolments, pushing administrators to look for new markets, develop new partners, and be more resourceful in order to ride out the current economic drought.

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US confirms visa policy for conditional admissions

By ICEF staff: ICEF Monitor: 3rd August 2016

- *The US government has released its final policy guidance on conditional admissions for international students*
- *Under the now-official policy, universities may only issue I-20s for academic programmes when students have met all admissions requirements*
- *This means that those students pursuing English studies, or any other preparatory programmes, offered by a university will require a separate I-20 for those courses, and then a further I-20 for their degree studies*
- *It also means that students pursuing preparatory studies at a partner institution in the US (i.e., a separate language school or other provider) must do so on the strength of an I-20 issued by the partner school, and will have to wait until all admission requirements have been satisfied before securing a separate I-20 for their university studies*

The US Department of Homeland Security's (DHS) Student and Exchange Visitor Program (SEVP) has issued its long-awaited final policy guidance regarding conditional admissions for international students intending to study in the US on F-1 (academic) or M-1 (vocational) visas.

The final policy, published on 13 July 2016, closely resembles a draft version released in July 2014, and its key points are as follows.

- The now-official policy statement effectively establishes that universities may not issue an I-20 (the document that international students need to acquire a study visa) for academic studies until the student has met all requirements for admission.
- Universities that operate their own English language programmes may issue an I-20 for language studies, and, subsequently, a separate I-20 for students continuing to academic studies once language proficiency requirements have been met. In such cases, universities are now required to process level change reports to SEVP verifying that students are fully admitted to degree programmes.

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Very strong performance from student placement

By IDP staff: IDP.com: 30th August 2016

IDP Education Limited (ASX: IEL) today announced its financial results for the 2016 financial year (FY16).

For the twelve months to 30 June 2016, the Company reported total revenue of \$361.6 million, an increase of 17% compared to FY15. Net profit after tax (NPAT) was \$39.9 million which represents growth of 32% compared to the FY15 pro-forma.

Andrew Barkla, IDP Education Chief Executive Officer and Managing Director, said the results reflected a continuation of the Company's strong underlying organic growth profile across each of its product categories: Student Placement, English Language Testing and English Language Teaching.

According to Mr Barkla, IDP Education's operational and financial highlights during FY16 included:

- Record full year revenue and earnings with double-digit revenue growth in each of the Company's core product categories
- Very strong performance from Student Placement with the highlight being a 100% increase in revenue from the placement of students to UK, USA, Canada and New Zealand (IDP Education's 'multi-destination' countries)
- Revenue from IDP Education's Australian Student Placement business up 17% driven by solid growth in both volumes and average fees
- English Language Testing performing strongly with revenue from IDP Education's global IELTS operations up 11% on FY15
- Strong cash generation which resulted in a balance sheet with \$35.4m of net cash as at 30 June 2016

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China, Singapore enter top 100 in Shanghai rankings for the first time

By Natalie Marsh: The Pie News: 31st August 2016

Singapore and China have entered the world's top 100 universities for the first time in the Shanghai rankings, while the US continues to dominate the top 20 positions.

The 2016 edition of the Shanghai rankings, also known as the Academic Rankings of World Universities, featured nine universities that placed in the top 100 for the first time.

Among these were Tsinghua University ranking 58th, and Peking University at 71st, both marking the first time Chinese universities placed in the top 100.

This was a huge jump for both universities, which last year sat in the 101-150 cohort.

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World insight: developing the first Chinese university branch campus in Malaysia

By Alan Ruby, Bonnie Yingfei He: Times Higher Education: 27th August 2016

In 2013, the Malaysian government invited China's Ministry of Education to establish a university branch campus to strengthen bilateral relations between the nations. Xiamen University (XMU) was chosen to lead the initiative because its founder, Tan Kah Kee, was a Chinese Malaysian and there are well-established ties between XMU and Malaysia.

Xiamen University Malaysia (XMUM) opened in February 2016 as "the first overseas campus established by a renowned Chinese university and the first Chinese university branch campus in Malaysia". XMUM is a not-for-profit entity. Any surplus revenues are to be reinvested in research and scholarships in Malaysia. Nearly all of its courses will be taught in English with the exception of traditional Chinese medicine and Chinese studies programmes.

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Chinese universities break into top global rankings for the first time

By ICEF staff: ICEF Monitor: 29th August 2016

- *China's Tsinghua University became the first-ever Chinese institution to crack the top 20 in the Times Higher Education World Reputation Rankings this year*
- *In total, China placed a record-high nine institutions in the global reputation ranking for 2016*
- *In another notable first, two Chinese institutions, Tsinghua and Peking University, also broke into the top 100 in this year's Shanghai Ranking*

The growing strength of China's higher education system has been on full display of late, most recently with the country's strong showing in major global rankings.

In May, Tsinghua University became the first-ever Chinese institution to crack the top 20 in the Times Higher Education World Reputation Rankings 2016. Peking University followed close behind at number 21 in the table, which is based entirely on an invitation-only survey of 10,000 academics worldwide. In total, China placed a record nine universities in the top 100 of the THE ranking including first-time entrants Fudan University, Shanghai Jiao Tong University, and Zhejiang University.

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International

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NYC most expensive for accommodation, says Student.com

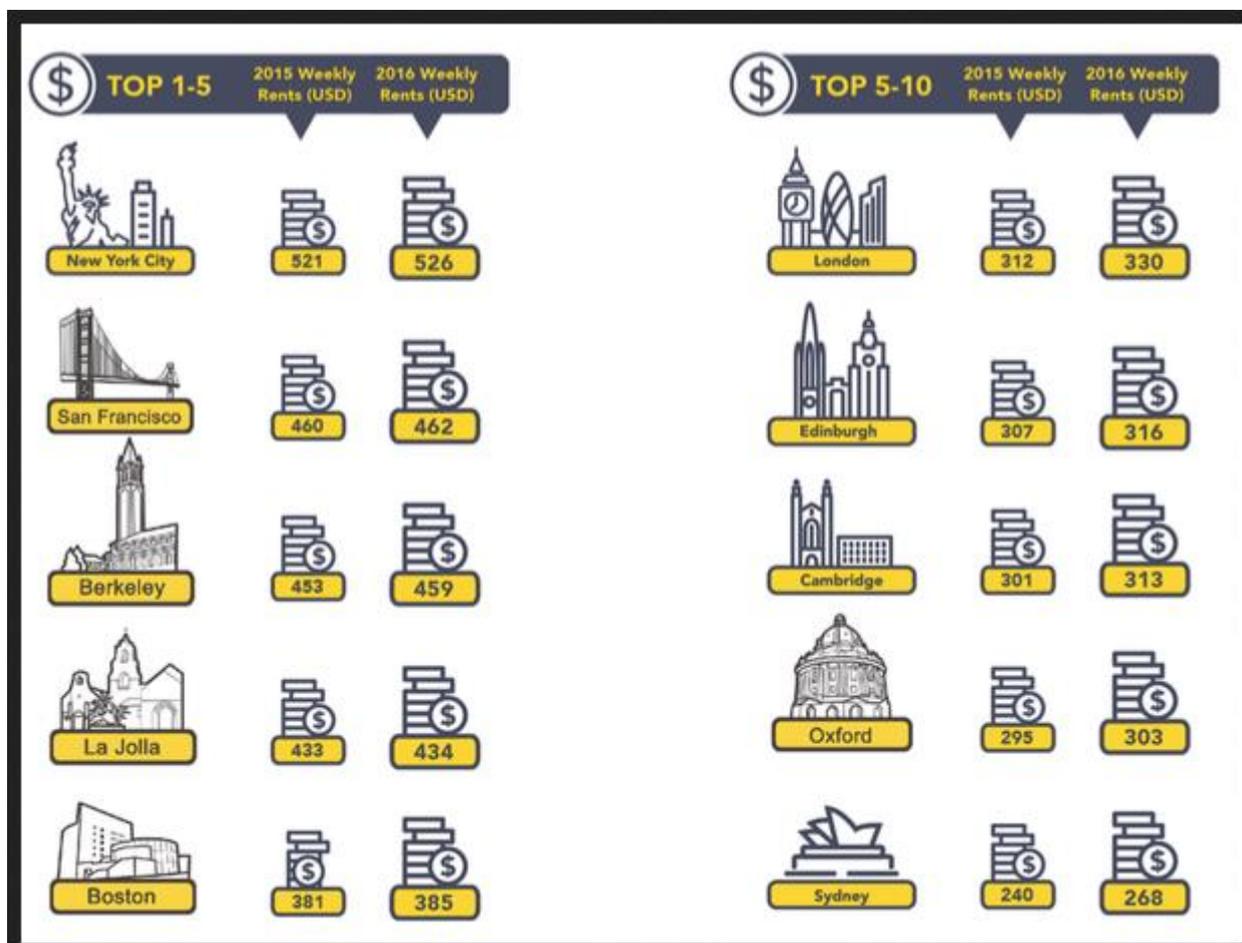
By Beckie Smith: The Pie News: 1st September 2016

New York is the world's most expensive city for international student accommodation, according to data published by bookings platform Student.com, while rents are climbing fast in the UK and some Australian cities.

Student.com compiled data from bookings across its entire user base into its 2016 overseas student accommodation indicator, distributed in China.

It found that students booking through Student.com paid \$526 a week on average to live in the Big Apple in 2016 – \$60 more than in the second most expensive city, San Francisco.

London, notoriously expensive for international students, came in sixth, with accommodation costing an average of \$330 a week – nearly \$200 less than in New York.



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Higher education must brace for digital disruption

By Nicola Jenvey: University World News: 2nd September 2016

Disruptions to higher education systems and deliveries are fundamentally changing the perceptions of access to information and university attendance, while giving developing countries an advantage over the developed world, says Rob Brown of global education group Navitas.

Anyone demanding a premium for delivering education or expecting people to come to physical infrastructure to conduct business or acquire services will be disrupted and must reassess their models, delegates to the Global Conference on the Internationalisation of Higher Education held in the Kruger National Park, South Africa, learned.

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Dutch universities defend growth of English courses

By Ellie Bothwell: Times Higher Education: September 2016

The Netherlands' university association has defended the growth of English-language courses at Dutch institutions, claiming that it will "enhance the quality of education" and boost the country's "innovative strength and competitiveness".

Figures revealed by Dutch newspaper de Volkskrant last month found that 60 per cent of courses at Dutch universities are taught in English, and this increases to 70 per cent when only master's degrees are counted. The analysis was based on 1,632 degree courses at 13 of the country's research-intensive universities.

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Survey finds increasing focus on online channels among higher education marketers

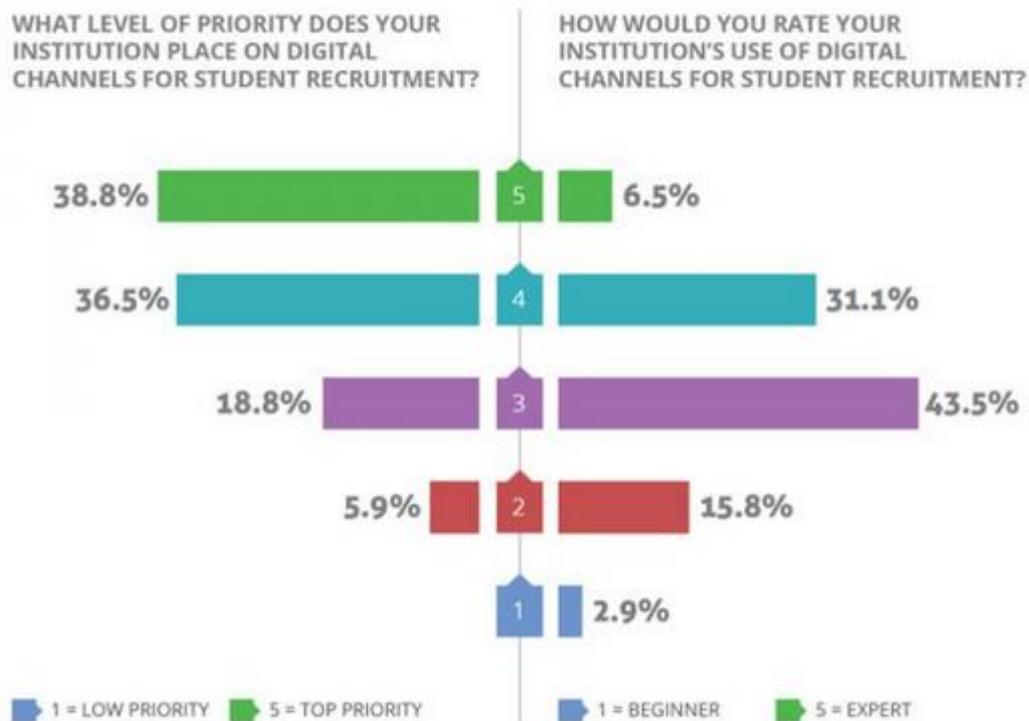
By ICEF staff: ICEF Monitor: 30th August 2016

- An international survey of higher education marketers finds that digital channels are a high priority for three-quarters of respondents, and that nearly half expect their digital marketing spend to increase this year
- The major channels emphasised by recruiters are design and optimisation of institutional websites, social media, and email marketing
- Most respondents rate investments in website optimisation to have been their most effective digital strategy in 2015
- A majority also expect continued improvements in institutional websites to be the focus of their digital spending in 2016

A global survey of nearly 200 higher education marketers finds that digital continues to claim a growing role in student recruitment this year. QS Digital Solutions ran its survey over December 2015 and January 2016, and the findings are summarised in a new report, Digital Marketing Trends in Higher Education 2016.

A clear majority of respondents (75%) said that digital channels are a high priority at their institutions and – in line with this overarching finding – nearly half expected their digital marketing budget to increase in 2016.

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Institutional priority and expertise in digital recruitment channels, as rated by survey respondents. Source: QS Digital Solutions

English-medium pathways worth \$1.4bn annually

By Natalie Marsh: The Pie News: 7th September 2016

The global market for English-medium pathway programmes is worth an estimated \$1.4bn a year, according to a new report by StudyPortals and Cambridge English which forecasts growth in the pre-master's pathways sector.

The report looked at 2,275 pathway programmes globally, estimated at 80% of the total share.

Despite master's degrees claiming a high proportion of the number of globally mobile students, just over a fifth (21%) of all pathway programmes are developed for students wanting to progress into this level of study.

"We actually assumed the market would be even bigger for pre-master's than it currently is," Carmen Neghina, head of intelligence at StudyPortals told The PIE News.

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