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International

SCALE OF UK HIGHER EDUCATION TRANSNATIONAL EDUCATION 2017–18: WELSH PROVIDERS TREND ANALYSIS OF HESA DATA

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Executive summary:

This report provides trend analysis of UK transnational education (TNE) in relation to Welsh providers. It provides an analysis of where students studied, at what level, and through what kind of provision during the 2017–18 academic year. It also puts some of the figures into context, by providing a longitudinal overview of trends in TNE.

Audience:

Pro-Vice-Chancellors, Directors International
and International Office staff
with responsibility for TNE in Wales.

INTRODUCTION

Higher education transnational education (TNE) is the delivery of degrees in a country other than where the awarding provider is based. It can include, but is not limited to, branch campuses, distance learning, online provision, joint and dual degree programmes, double awards, ‘fly-in’ faculty, and mixed models, traditionally referred to as blended learning.

For the purposes of this report, UK TNE students are learners enrolled in a higher education degree programme which leads to a UK qualification but is based in a country outside the UK. This includes joint, double or dual awards. In this report, we use the word ‘students’ to represent these UK TNE learners, unless otherwise stated.

Data about TNE is collected annually by the Higher Education Statistics Agency (HESA) via the Aggregate Offshore Record (AOR). AOR data has been collected since 2007–08 from UK higher education providers who subscribe to HESA. Universities provide data in their AOR return about “students that are studying wholly outside the UK who are either registered with the reporting provider or who are studying for an award of the reporting provider”.

HESA collects data which relates to five categories or types of TNE provision and universities are responsible for returning data against these. The categories are broad, and universities may not always define their programmes by the same definitions used by HESA. **TABLE 1** shows these categories, how they are referred to in this briefing, and an example for each. These examples are not exhaustive, and there are many other ways that TNE programmes operate which may be included in each category.

In accordance with HESA’s Standard Rounding Methodology:

- Data has been rounded to the nearest 5.
- Any number lower than 2.5 has been rounded to 0.
- Percentages have been suppressed where totals are less than 25.

Neither the Higher Education Statistics Agency Limited nor HESA Services Limited can accept responsibility for any inferences or conclusions derived by third parties from data or other information supplied by HESA Services.

All data relates to Welsh providers that returned data to HESA.

Type of provision		Report terminology	Example of provision
Students registered at the reporting provider.	Studying overseas for UK Higher education Provider (HEP) award at overseas campus of reporting provider.	Overseas campus.	Overseas standalone or joint campus.
	Distance, flexible and distributed learning for UK HEP award where the location of the student is known to be overseas.	Distance, flexible or distributed learning.	Programmes delivered online.
	Other arrangements including collaborative provision.	Collaborative provision.	Joint and dual degrees, franchised provision.
Students studying for an award of the reporting provider.	Registered at overseas partner organisation.	Registered at overseas partner organisation.	Validation and other models where the majority of teaching is delivered in-country.
	Any other student studying overseas for an award of the reporting provider.	Other arrangement.	Multiple UK or international partners delivering a combination of other types of provision.

REPORTING PROVIDERS

Note: UK total excludes three main reporting providers of distance, flexible and blended TNE (Oxford Brookes University, the Open University and the University of London). In 2017–18, these three providers made up 51.2% of the AOR and relatively small variations in one of them can have an impact on our understanding of the performance and spread of TNE more generally amongst UK universities.

As shown in **FIGURE 1**, in 2017–18 Welsh providers reported 26,980 students in TNE, which is 8.1% of the total reported by UK providers. As a way of comparison, Welsh providers hosted 4.6% of the international (non-UK) students in the UK in 2017–18.

FIGURE 1: PROPORTION OF UK TNE STUDENTS BY COUNTRY OF PROVIDER, 2017–18

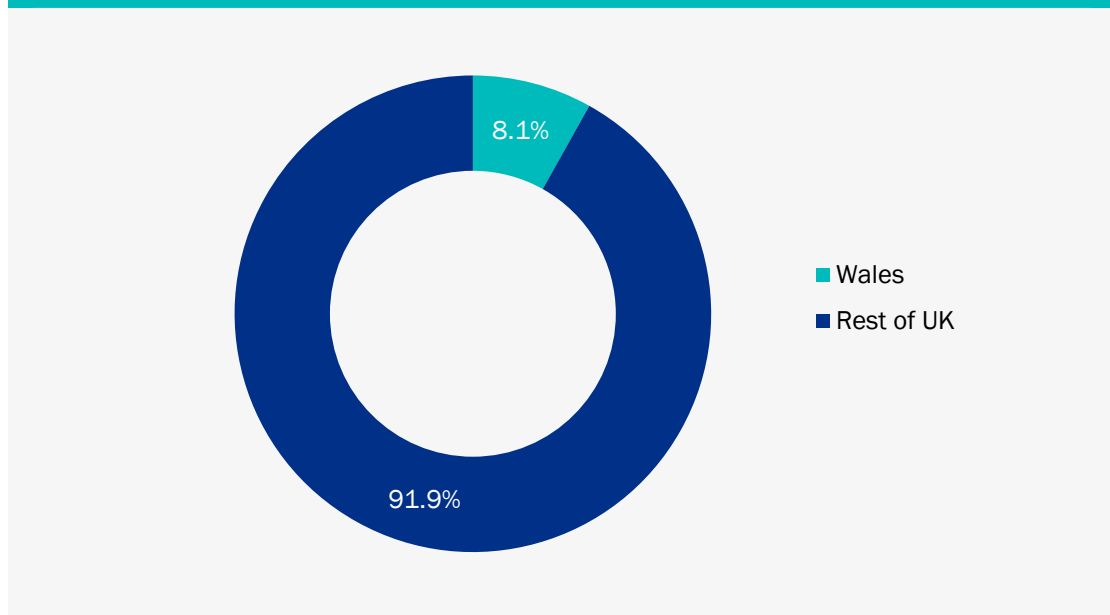
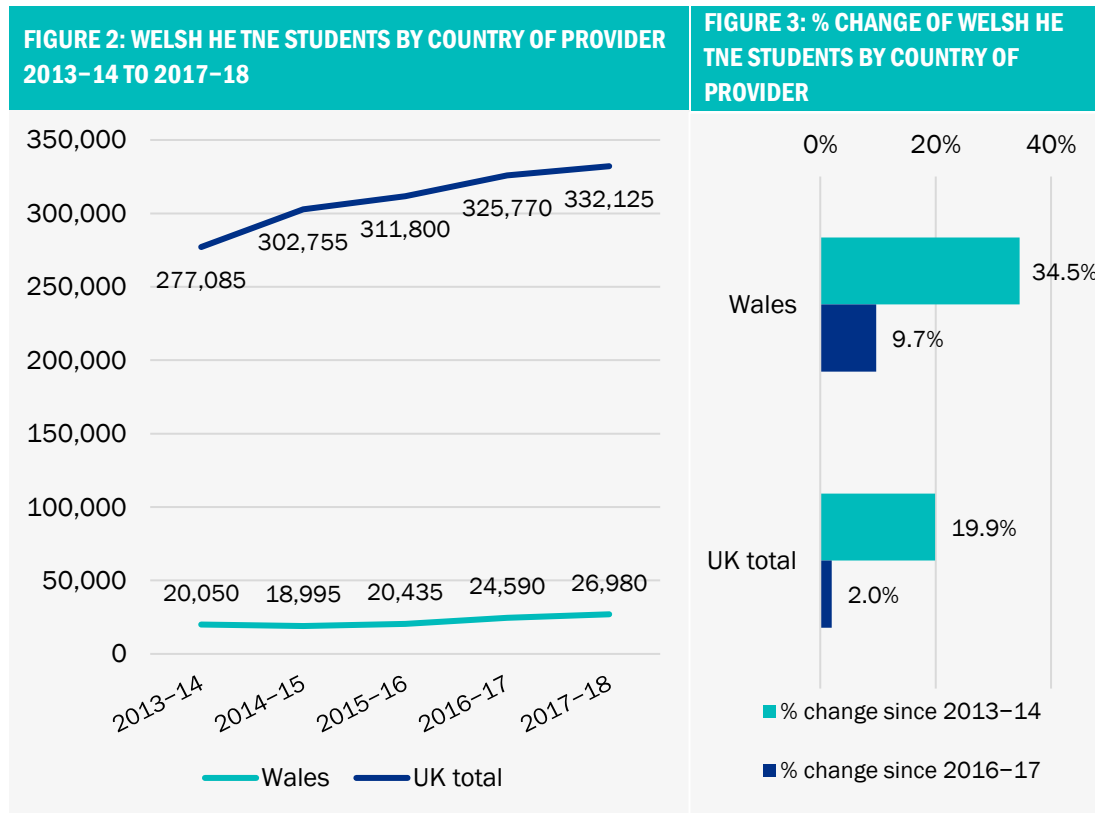
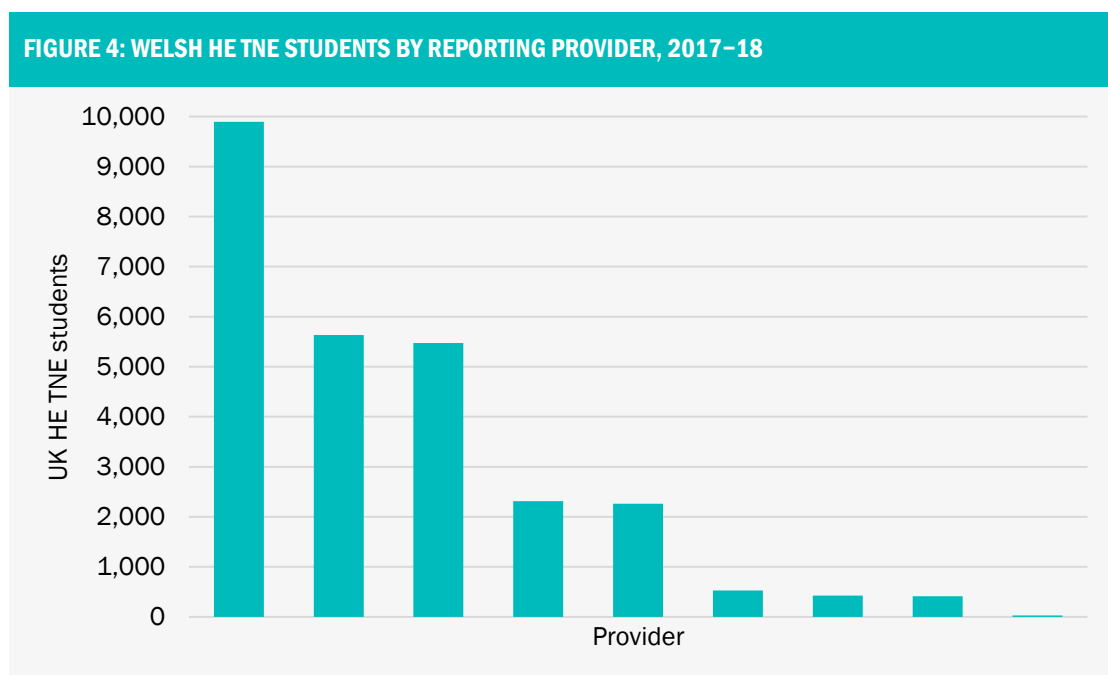


FIGURE 2 and **FIGURE 3** show that between 2013–14 and 2017–18, TNE student numbers grew by 34.5% in Wales, compared to 19.9% in the UK (excluding the three main providers of distance, flexible and blended TNE). From 2016–17 to 2017–18 growth was 9.7% in Wales against 2.0% in the UK.



In 2017–18, five out of nine providers in Wales reported more than 1,000 students in TNE, as shown in **FIGURE 4**. This represents 55.5% of providers, compared with 51.4% in the UK as a whole. Six providers reported fewer than 4,000 students, which is 66.6%, compared with 80% in the UK as a whole.



TYPE OF PROVISION

FIGURE 5 shows that in 2017–18, 47.2% of TNE students at Welsh providers were studying through collaborative provision, compared with 44.3% overall in the UK; 23.1% were studying through distance, flexible or distributed learning compared with 20.7% overall in the UK; 2.5% were registered at an overseas campus compared with 8.5% overall in the UK and 20.9% were registered at an overseas partner organisation compared with 24.5% overall in the UK.

FIGURE 5: WELSH HE TNE STUDENTS BY TYPE OF PROVISION, 2017–18

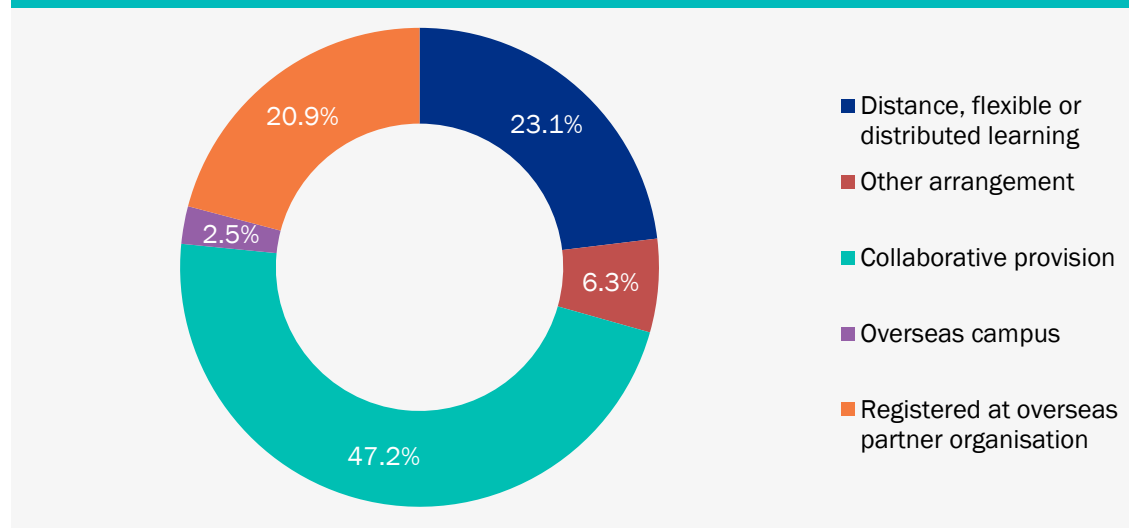


TABLE 2 shows that the fastest growing TNE type of provision in Wales between 2013–14 and 2017–18 was overseas campus with an 1,975.8% increase, which was also the fastest growing type of provision for UK providers overall with a 47.5% increase. Between 2016–17 and 2017–18 the fastest growing category in Wales was distance, flexible or distributed learning increasing by 101.9%, compared to 7.3% in the UK as a whole. There has been a marked decline in Wales in the registered at overseas partner organisation category (-24.9%) compared with 4.5% growth in the UK as a whole from 2013–14 to 2017–18.

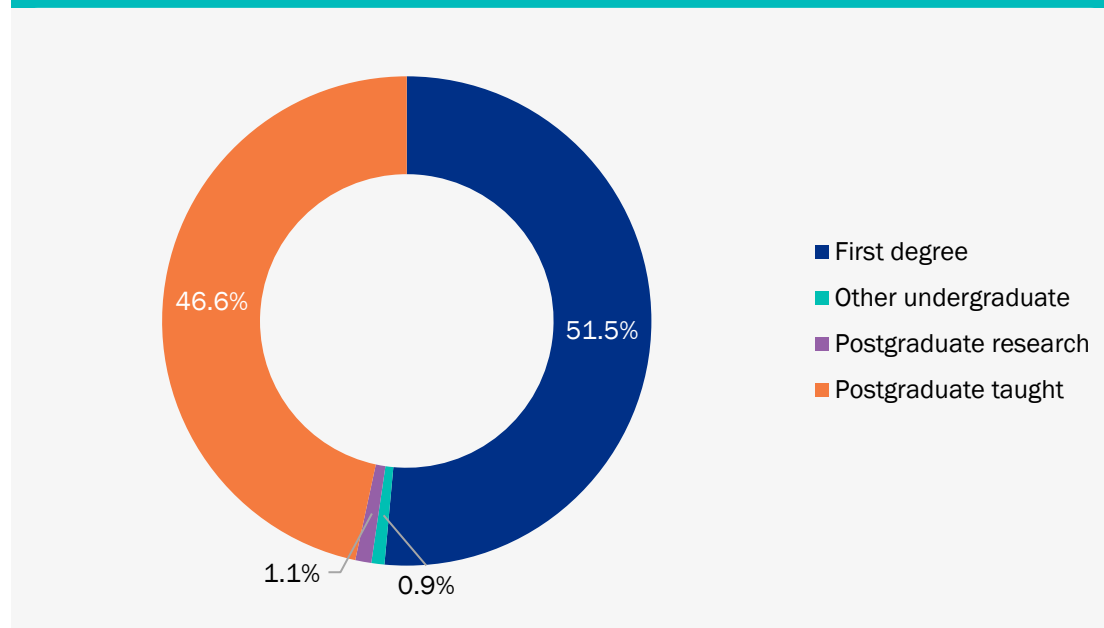
TABLE 2: WELSH HE TNE STUDENTS BY TYPE OF PROVISION, 2013–14 TO 2017–18

Type of provision	Academic year					Change since 2013–14	Change since 2016–17
	2013–14	2014–15	2015–16	2016–17	2017–18		
Distance, flexible or distributed learning	605	535	1,870	3,085	6,230	926.0%	101.9%
Other arrangement	485	805	1,425	1,590	1,700	249.8%	6.8%
Collaborative provision	6,040	7,525	9,035	11,780	12,730	110.8%	8.0%
Overseas campus	35	325	505	630	685	1,975.8%	8.6%
Registered at overseas partner organisation	12,890	9,810	7,605	7,505	5,635	-56.3%	-24.9%
Total	20,050	18,995	20,435	24,590	26,980	34.5%	9.7%

LEVEL OF PROVISION

FIGURE 6 shows that in 2017–18 Welsh providers reported that 52.4% of TNE students were studying at the undergraduate level and 47.6% at the postgraduate level. The proportion for the UK as a whole was 64.9% undergraduate and 35.1% postgraduate.

FIGURE 6: WELSH HE TNE STUDENTS BY LEVEL OF STUDY, 2017–18



As shown in **TABLE 3**, in 2017–18 Welsh providers reported 14,115 TNE students at undergraduate level, an increase of 12.2% over 2013–14, and 12,865 TNE students at postgraduate level, an increase of 33.3% over 2013–14. In the UK as a whole the increases were 17.1% and 25.4% respectively.

TABLE 3: UK HE TNE STUDENT BY LEVEL OF STUDY, 2013–14 TO 2017–18

Level of study		Academic Year					Change since 2013–14	Change since 2016–17
		2013–14	2014–15	2015–16	2016–17	2017–18		
UG	First degree	12,300	11,050	11,760	14,755	13,880	12.9%	-5.9%
	Other UG	275	130	175	190	235	-15.6%	22.6%
	Total	12,575	11,180	11,935	14,945	14,115	12.2%	-5.5%
PG	PG research	20	25	80	160	285	1,200.0%	79.9%
	PG taught	7,455	7,790	8,420	9,490	12,575	68.8%	32.5%
	Total	7,475	7,815	8,500	9,650	12,865	72.1%	33.3%
Total		20,050	18,995	20,435	24,590	26,980	34.5%	9.7%

HOST REGIONS & HOST COUNTRIES

TABLE 4 shows that Asia hosted the largest contingent of TNE students reported by Welsh providers in 2017–18, followed by Other European Union, Africa, the Middle East, North America, Australasia, non-EU Europe and South America.

Region	Students	%
Asia	11,025	40.9%
Other European Union	7,685	28.5%
Africa	4,300	16.0%
Middle East	3,540	13.1%
North America	300	1.1%
Australasia	55	0.2%
Non-EU Europe	50	0.2%
South America	15	0.0%

FIGURE 7 shows a breakdown of TNE students reported by Welsh providers by region in 2017–18. Compared with the UK as a whole, in Wales there was a higher proportion of students in Other European Union (28.5% in Wales vs 14.8% in the UK), Africa (16% in Wales vs 13.1% in the UK) and the Middle East (13.1% in Wales vs 11.4% in the UK), and a lower proportion in Asia (40.9% in Wales vs 52.4% in the UK), North America (1.1% in Wales vs 4.7% in the UK), non-EU Europe (0.2% in Wales vs 2.6% in the UK), Australasia (0.2% in Wales vs 0.6% in the UK) and South America (0.0% in Wales vs 0.4% in the UK).

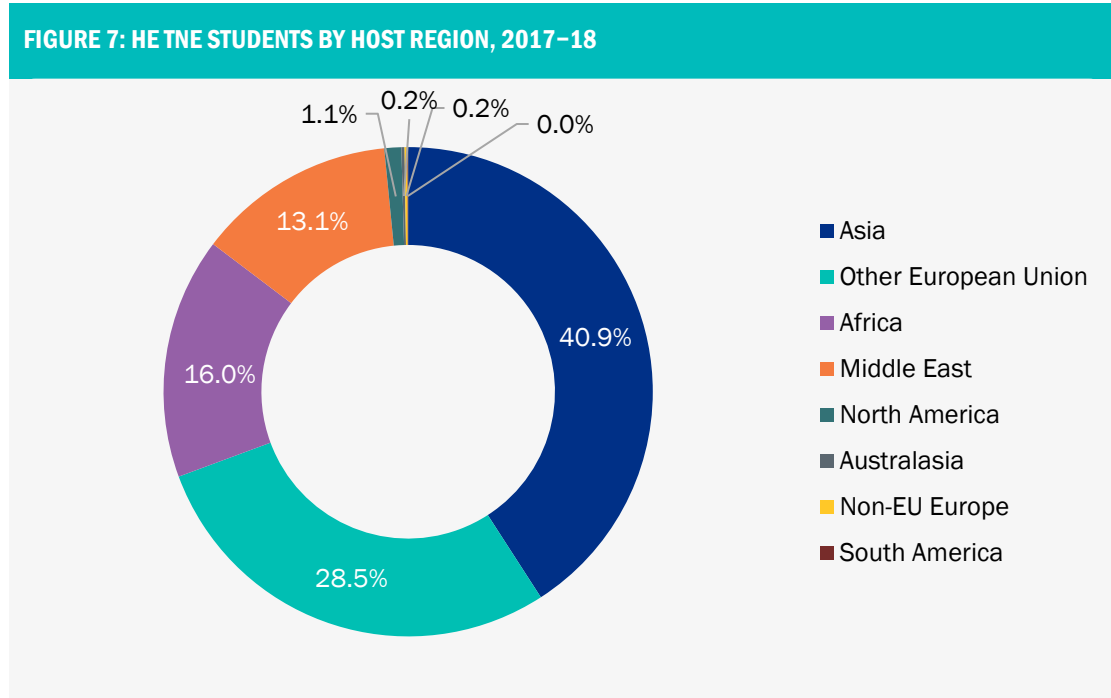
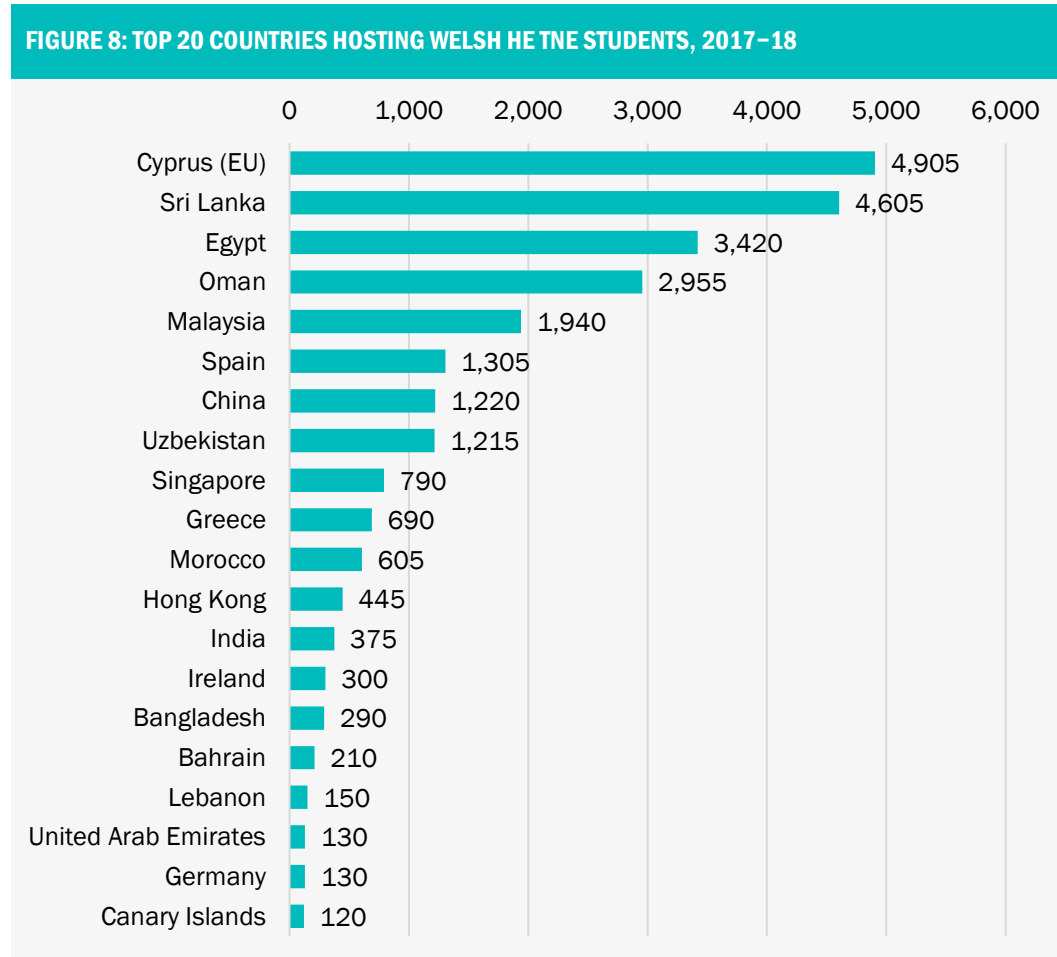


FIGURE 8 shows a breakdown of TNE students reported by Welsh providers by country in 2017 – 18. The top three countries host 50% of all students. Cyprus, Sri Lanka, Egypt, Oman, Spain (including the Canary Islands), Uzbekistan, Morocco, India, Ireland, Bangladesh, Bahrain and Lebanon have a higher relative position in Wales than in the UK overall, while Malaysia, China, Singapore, Greece, Hong Kong, United Arab Emirates (UAE) and Germany have a lower relative position.



Africa

FIGURE 9 shows that a majority of TNE students reported by Welsh providers in Africa were registered at overseas partner organisation (70.6%) followed by collaborative provision (22.7%), distance, flexible and distributed learning (5%), and at an overseas campus (1.7%).

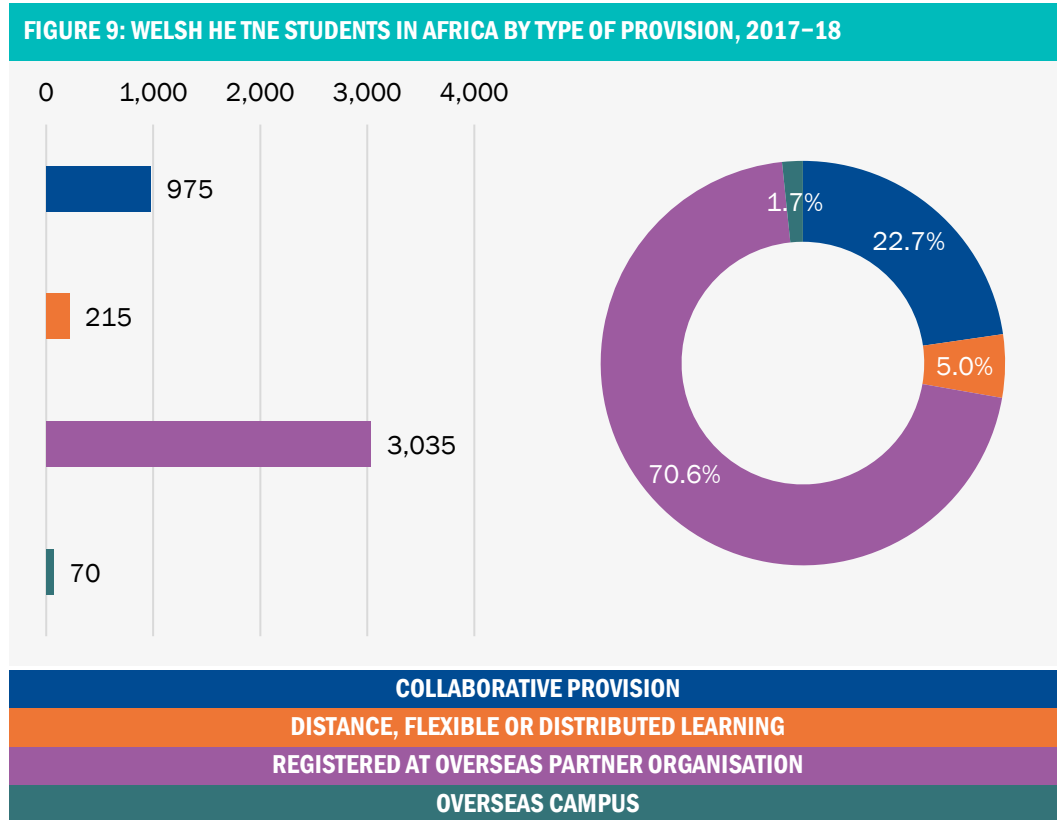


FIGURE 10 shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Welsh providers in Africa except for those registered at an overseas partner organisation, where there was a marked decline after reaching a peak in 2015–16.

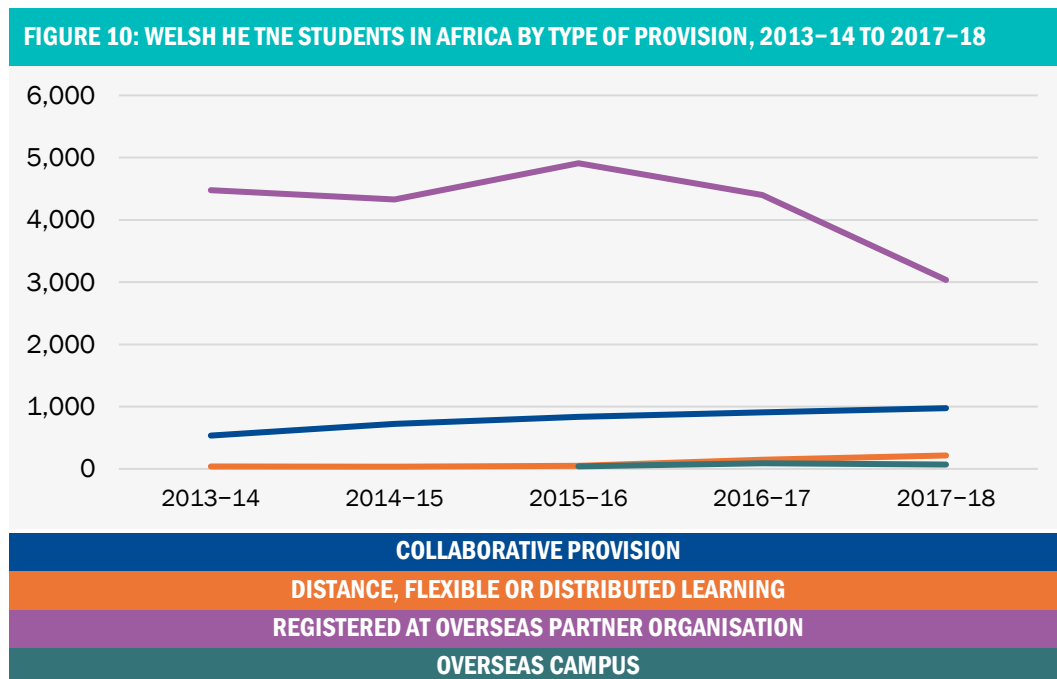


FIGURE 11 shows that 86.5% of TNE students reported by Welsh institutions in 2017–18 in Africa were studying at undergraduate level, against 13.5% at postgraduate level. **FIGURE 12** shows that between 2013–14 and 2017–18 there was an increase at the postgraduate level and a decline in undergraduate student numbers after reaching a peak in 2015–16.

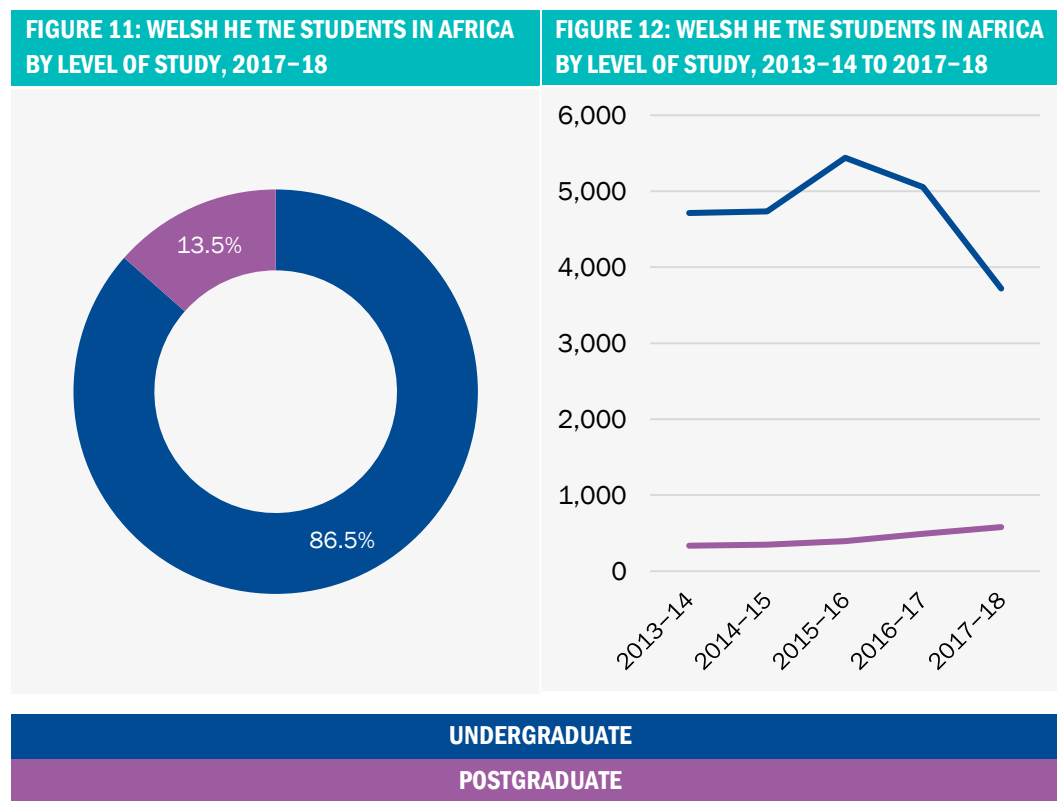


TABLE 5 shows the five African countries hosting the most TNE students from Welsh providers in 2017–18. Morocco, Mauritius and Kenya have a higher relative position than for the rest of the UK, while South Africa has a lower relative position. Egypt is the leading host country both for Welsh providers in in the UK as a whole.

TABLE 5: TOP FIVE HOST COUNTRIES OF WELSH HE TNE STUDENTS IN AFRICA, 2017–18		
Host country	Students	%
Egypt	3,420	79.5%
Morocco	605	14.1%
Mauritius	100	2.3%
South Africa	50	1.2%
Kenya	20	0.5%

Asia

FIGURE 13 shows that a majority of TNE students reported by Welsh providers in Asia were studying through collaborative provision (67.8%) followed by other arrangements (13.6%), registered at overseas partner organisation (10.3%), at an overseas campus (5.6%) and through distance, flexible or distributed learning (2.8%).

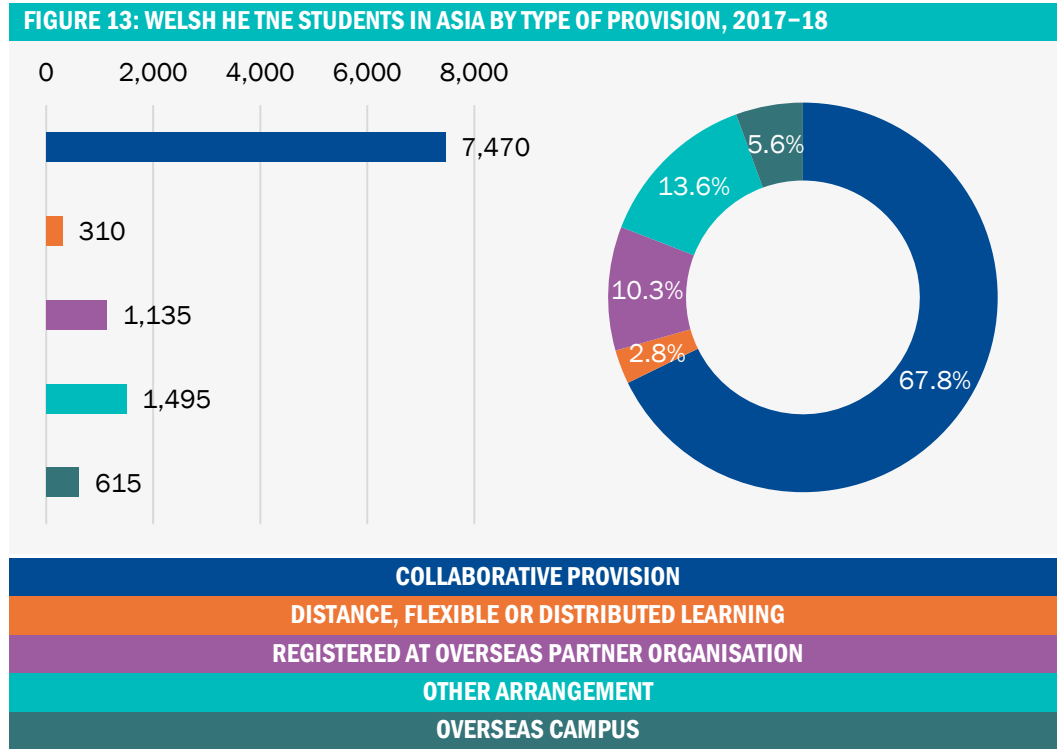


FIGURE 14 shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Welsh providers in Asia except in registered at an overseas partner organisation.

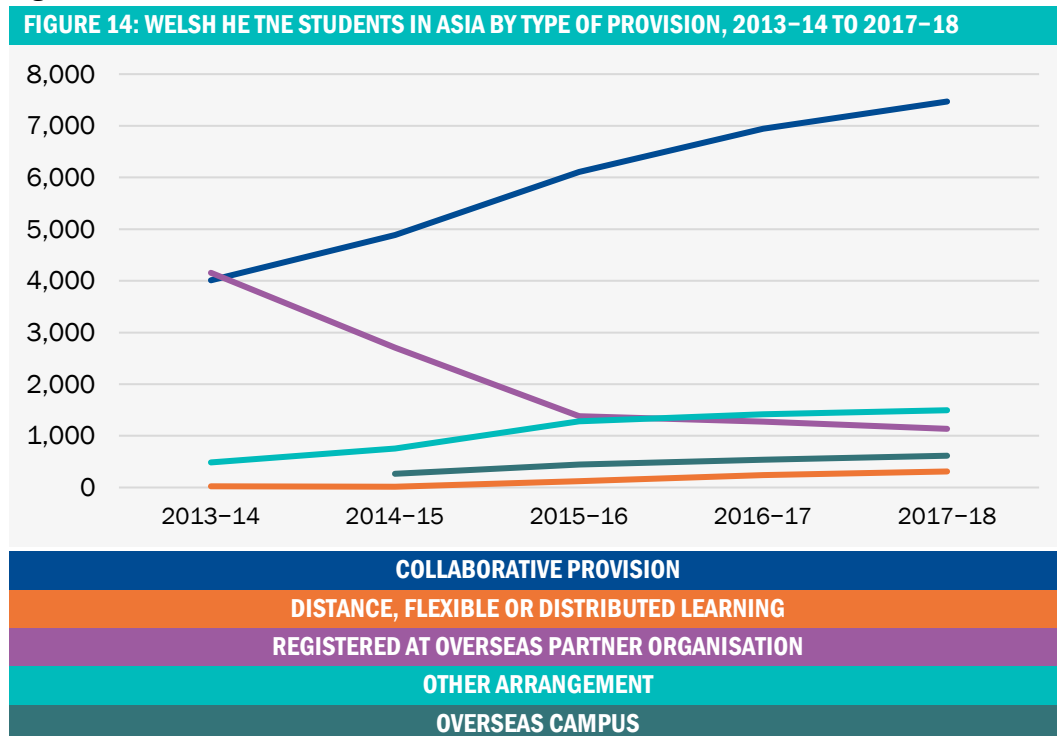


FIGURE 15 shows that 54.7% of TNE students reported by Welsh institutions in 2017–18 in Asia were studying at postgraduate level, against 45.3% at undergraduate level. **FIGURE 16** shows that between 2013–14 and 2017–18 there was an increase at both levels of study, more marked at undergraduate level after a decline between 2013–14 and 2014–15.

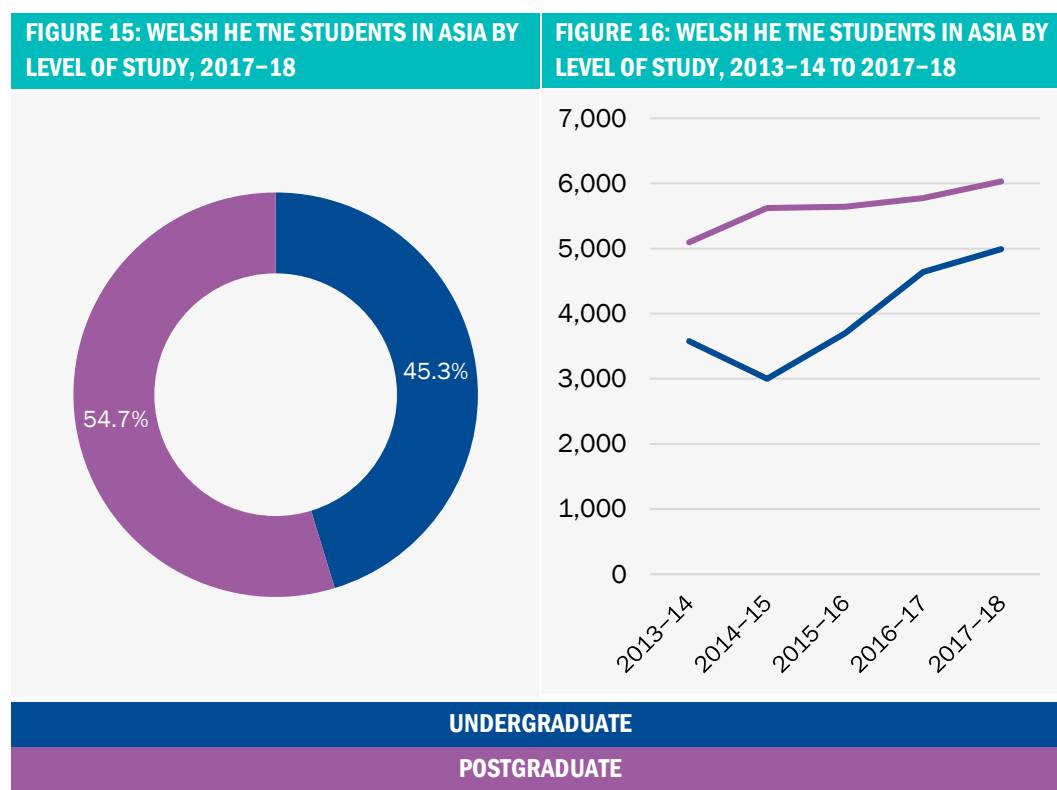


TABLE 6 shows the five Asian countries hosting the most TNE students from Welsh providers in 2017–18. Sri Lanka and Uzbekistan have a higher relative position than for the rest of the UK, while Malaysia, China and Singapore have a lower relative position.

Host country	Students	%
Sri Lanka	4,605	41.8%
Malaysia	1,940	17.6%
China	1,220	11.1%
Uzbekistan	1,215	11.0%
Singapore	790	7.2%

Australasia

FIGURE 17 shows that all TNE students reported by Welsh providers in Australasia were studying through distance, flexible and distributed learning.

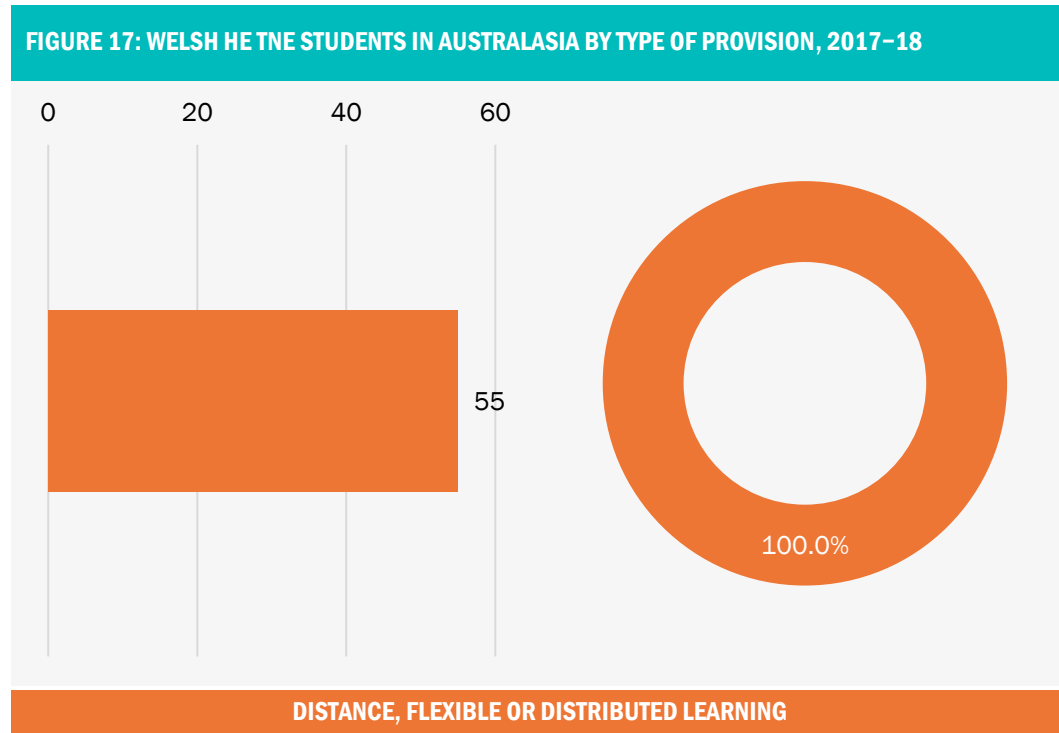


FIGURE 18 shows that the number of students studying through distance, flexible and distributed learning in Australasia decreased between 2013–14 and 2014–15 and increased between 2014–15 and 2017–18.

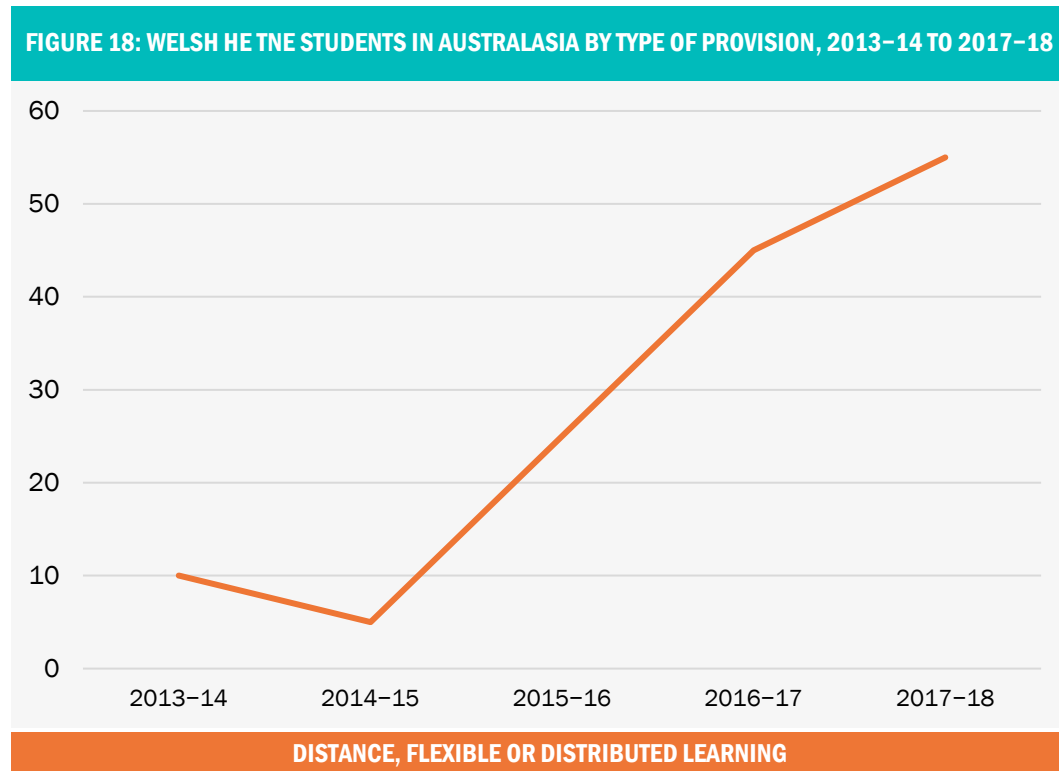


FIGURE 19 shows that all TNE students reported by Welsh institutions in 2017–18 in Australasia were studying at postgraduate level, **FIGURE 20** shows that following a decrease in 2014–15, there was an increase in student numbers between 2014–15 and 2017–18.

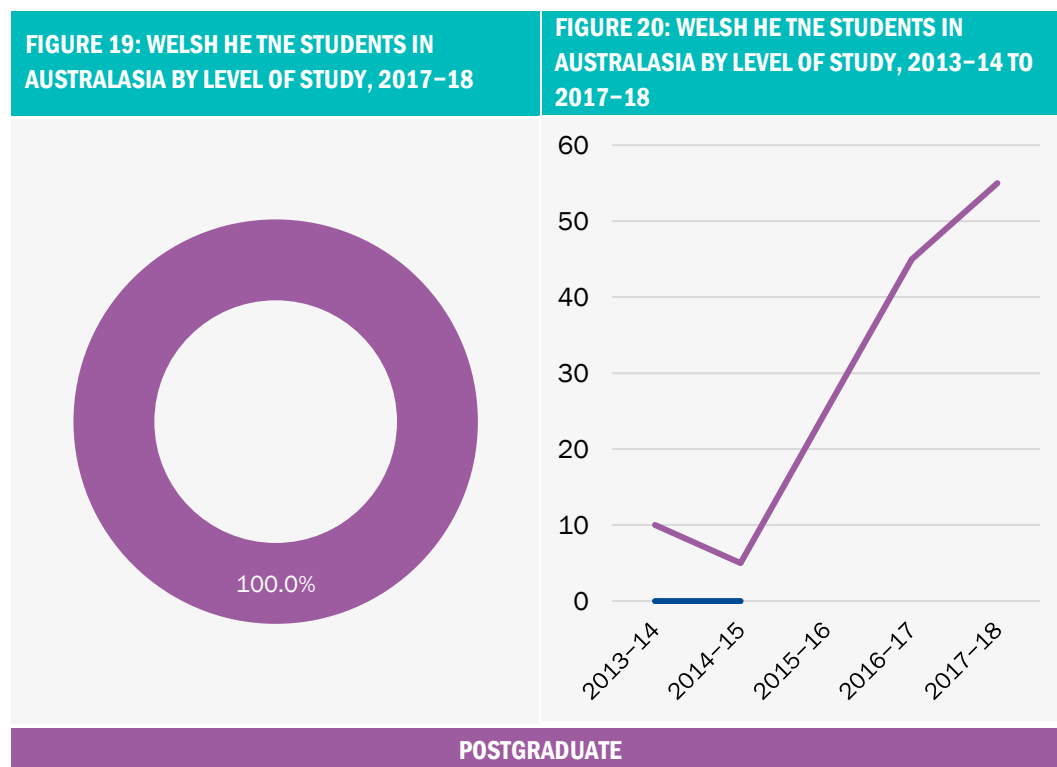


TABLE 7 shows the four Australasian countries hosting the most TNE students from Welsh providers in 2017–18. Papua New Guinea has a higher relative position than for the rest of the UK, while Fiji has a lower relative position. The same positions are held by Australia and New Zealand.

TABLE 7: TOP FOUR HOST COUNTRIES OF WELSH HE TNE STUDENTS IN AUSTRALASIA, 2017–18		
Host country	Students	%
Australia	40	75.0%
New Zealand	10	16.1%
Papua New Guinea	5	7.1%
Fiji	..	1.8%

Other European Union

FIGURE 21 shows that a majority of TNE students reported by Welsh providers in Other European Union were studying through distance, flexible and distributed learning (65.8%), followed by registered at overseas partner organisation (18.7%), and through collaborative provision (15.5%).

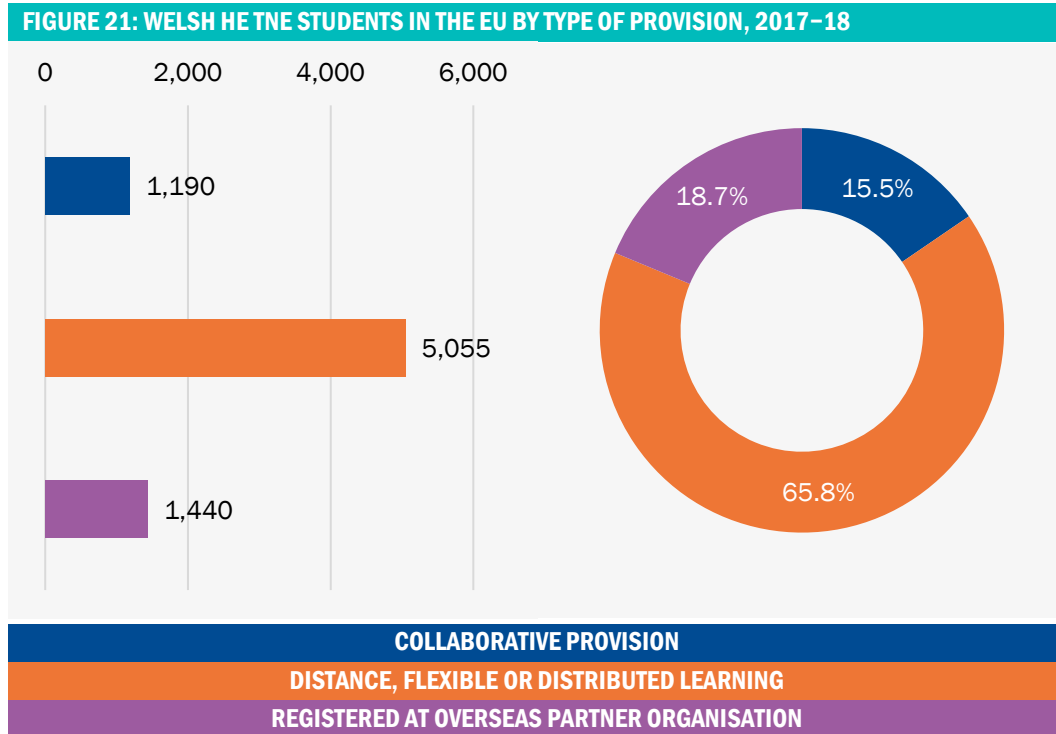


FIGURE 22 shows that between 2013–14 and 2017–18 there was an increase in students studying through distance, flexible and distributed learning, a decline in students registered at an overseas partner organisation and mostly flat numbers in collaborative provision in Other European Union. Students registered at an overseas campus were equal to zero in 2016–17 and 2017–18.

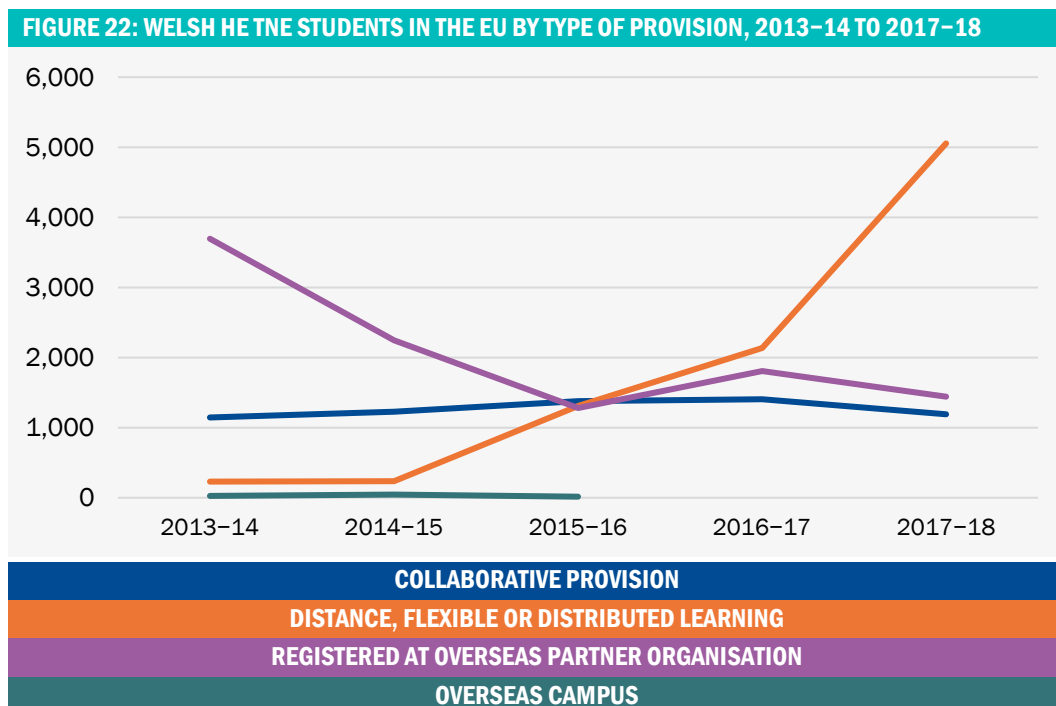


FIGURE 23 shows that 70.9% of TNE students reported by Welsh institutions in 2017–18 in Other European Union were studying at postgraduate level, against 29.1% at undergraduate level.

FIGURE 24 shows that between 2013–14 and 2017–18 there was an increase the postgraduate level and a decrease at the undergraduate level.

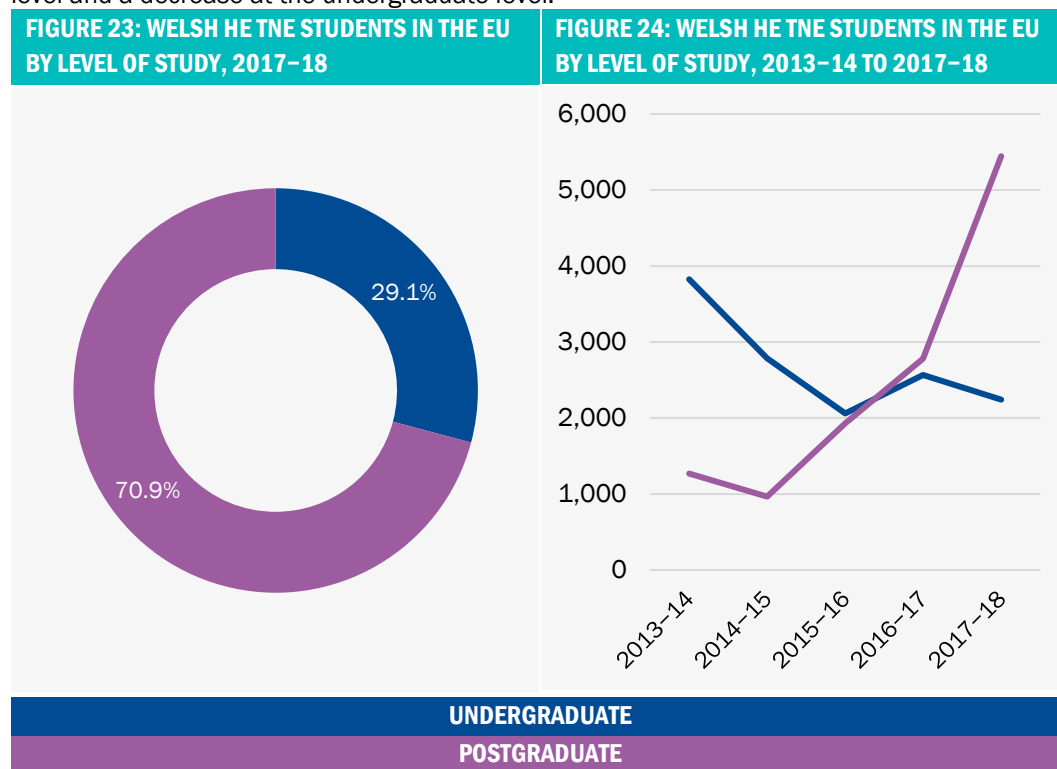


TABLE 8 shows the five Other European Union countries hosting the most TNE students from Welsh providers in 2017–18. Cyprus and Spain have a higher relative position than for the rest of the UK, while Greece and Germany have a lower relative position. The same position is held by Ireland.

TABLE 8: TOP FIVE HOST COUNTRIES OF WELSH HE TNE STUDENTS IN THE EU, 2017–18		
Host country	Students	%
Cyprus (EU)	4,905	63.8%
Spain	1,305	17.0%
Greece	690	9.0%
Ireland	300	3.9%
Germany	130	1.7%

Non-EU Europe

FIGURE 25 shows that a majority of TNE students reported by Welsh providers in non-EU Europe were studying through distance, flexible or distributed learning (58.8%) followed by those registered at an overseas partner organisation (41.2%).

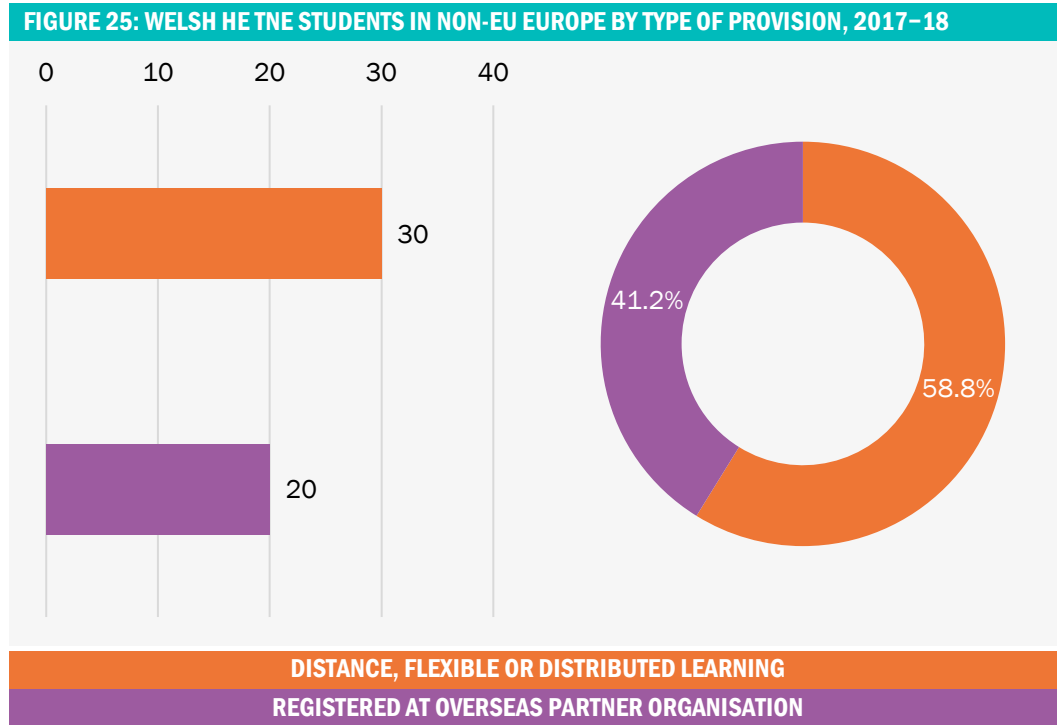


FIGURE 26 shows that between 2013–14 and 2017–18 there was a decrease in all TNE modes of study reported by Welsh providers in non-EU Europe except in distance, flexible or distributed learning, where numbers remained stable.

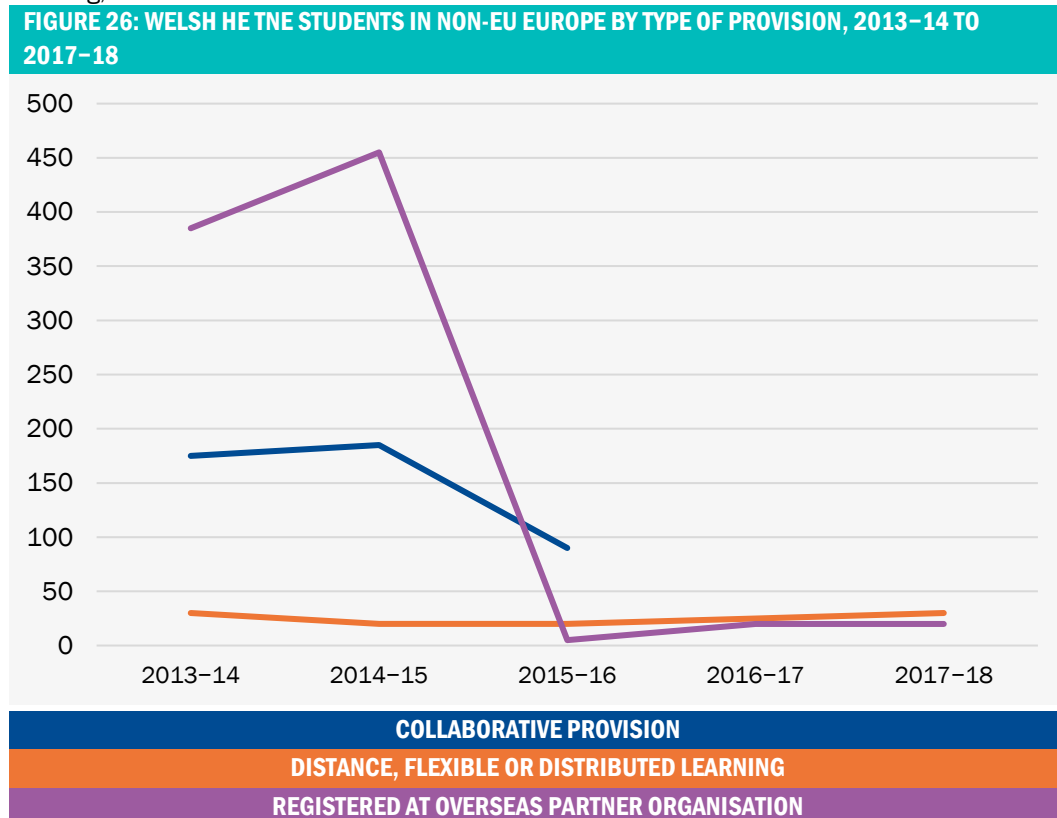


FIGURE 27 shows that 52.9% of TNE students reported by Welsh institutions in 2017–18 in non-EU Europe were studying at postgraduate level, against 47.1% at undergraduate level. **FIGURE 28** shows that between 2013–14 and 2016–17 there was a decrease both levels, and numbers have remained stable between 2016–17 and 2017–18.

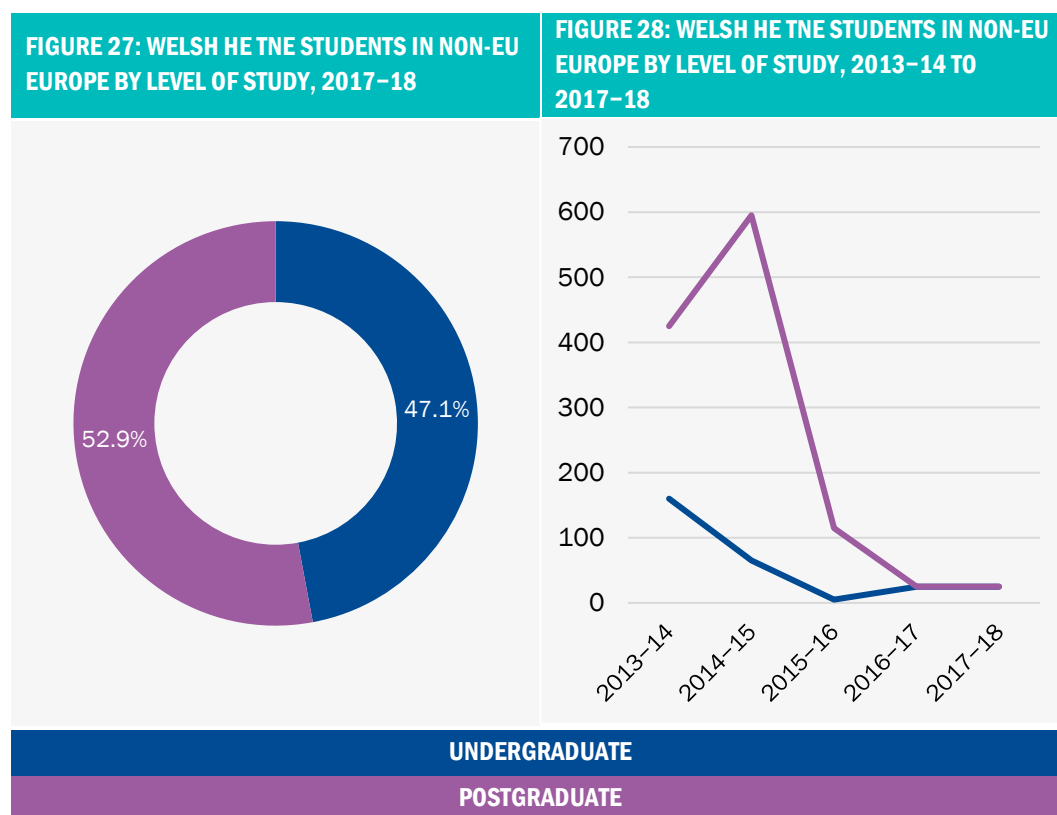


TABLE 9 shows the five non-EU European countries hosting the most TNE students from Welsh providers in 2017–18. Ukraine, Turkey and Cyprus (non-EU) have a higher relative position than for the rest of the UK, while Switzerland and Norway have a lower relative position.

TABLE 9: TOP FIVE HOST COUNTRIES OF WELSH HE TNE STUDENTS IN NON-EU EUROPE, 2017–18		
Host country	Students	%
Ukraine	20	43.1%
Switzerland	15	25.5%
Turkey	5	9.8%
Norway	5	5.9%
Cyprus (non-EU)	..	3.9%

Middle East

FIGURE 29 shows that a majority of TNE students reported by Welsh providers in the Middle East were studying through collaborative provision (87.3%), followed by distance, flexible and distributed learning (6.8%) and other arrangements (5.8%).

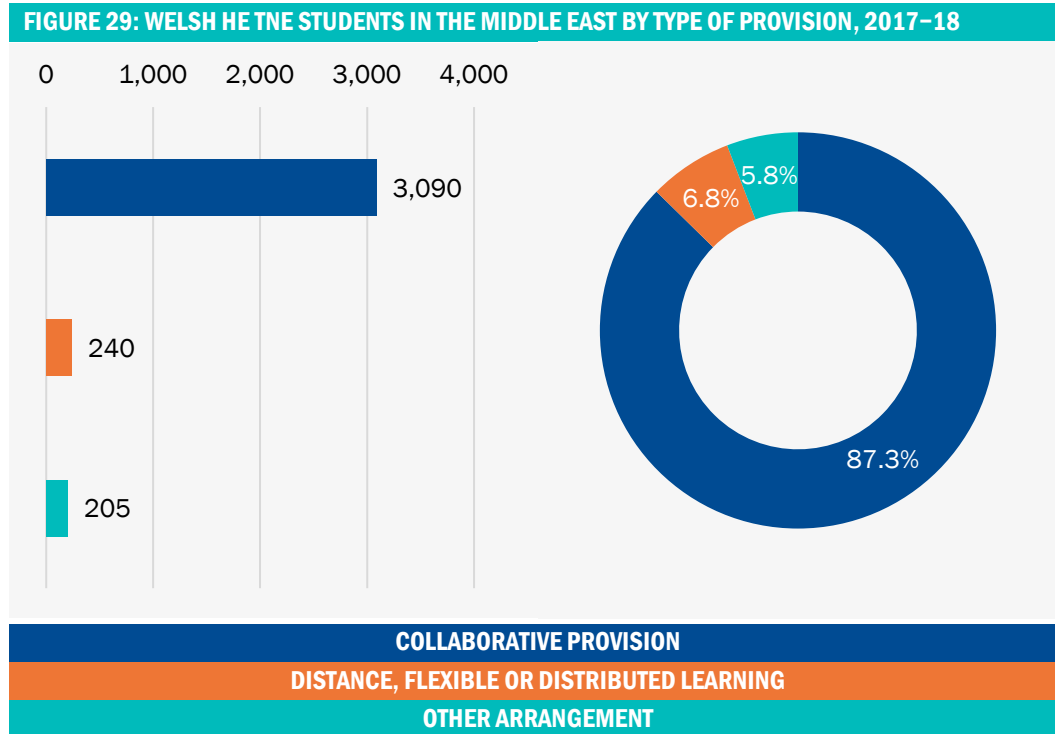


FIGURE 30 shows that between 2013–14 and 2017–18 there was an increase in all TNE modes of study reported by Welsh providers in the Middle East except in registered at an overseas partner organisation. The number of students studying through collaborative provision increased steeply between 2015–16 and 2017–18.

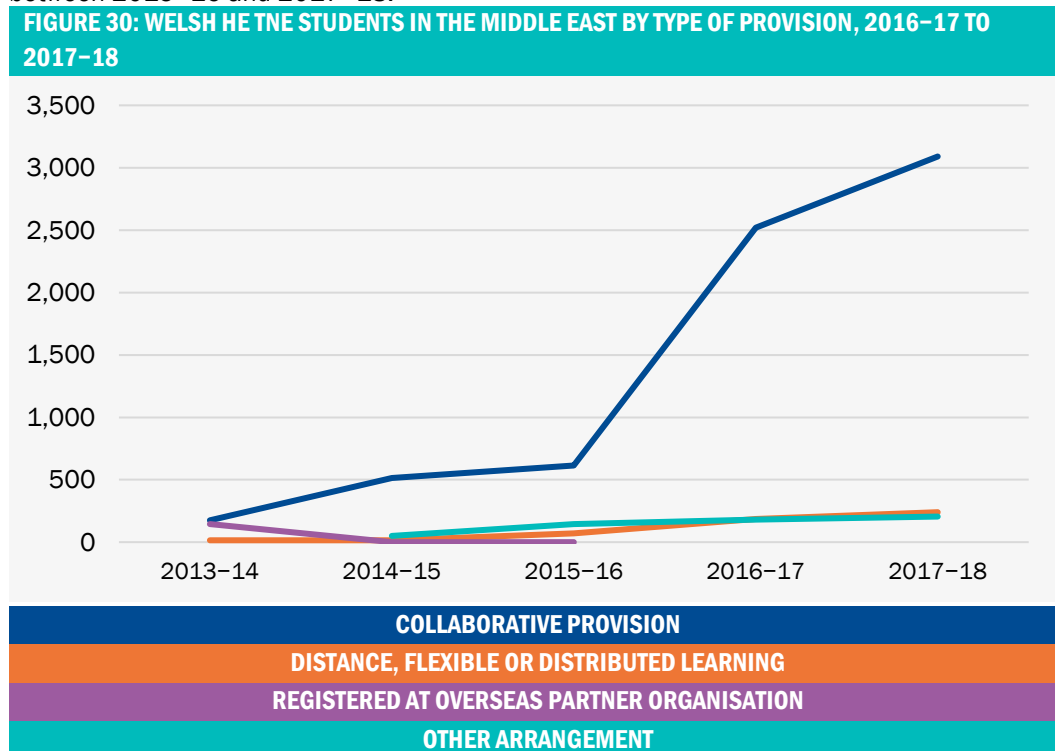


FIGURE 31 shows that 87.3% of TNE students reported by Welsh institutions in 2017–18 in the Middle East were studying at undergraduate level, against 12.7% at postgraduate level. **FIGURE 32** shows that between 2013–14 and 2017–18 there were increases at both levels of provision, more pronounced at undergraduate level.

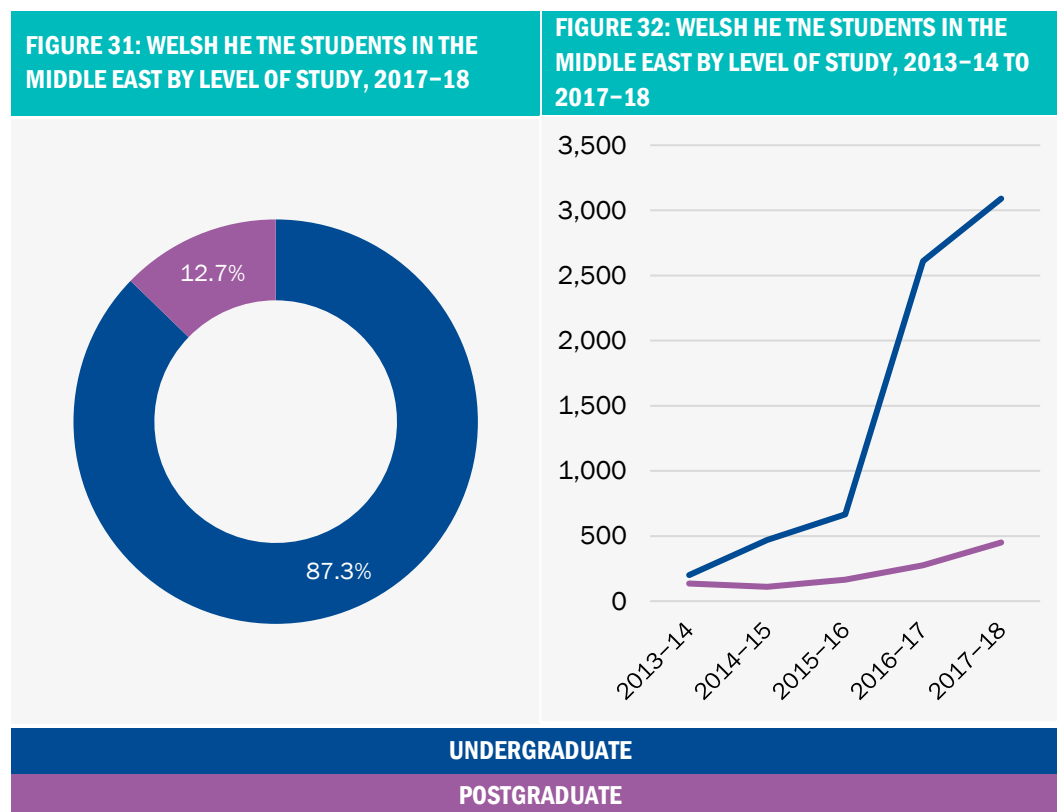


TABLE 10 shows the five Middle Eastern countries hosting the most TNE students from Welsh providers in 2017–18. Bahrain and Lebanon have a higher relative position than for the rest of the UK, while UAE and Saudi Arabia have a lower relative position. Oman has the same leading position.

TABLE 10: TOP FIVE HOST COUNTRIES OF WELSH HE TNE STUDENTS IN THE MIDDLE EAST, 2017–18		
Host country	Students	%
Oman	2,955	83.5%
Bahrain	210	5.9%
Lebanon	150	4.2%
United Arab Emirates	130	3.7%
Saudi Arabia	45	1.3%

North America

FIGURE 33 shows that a majority of TNE students reported by Welsh providers in North America were studying through distance, flexible and distributed learning (98%), followed by registered at an overseas partner organisation (2%).

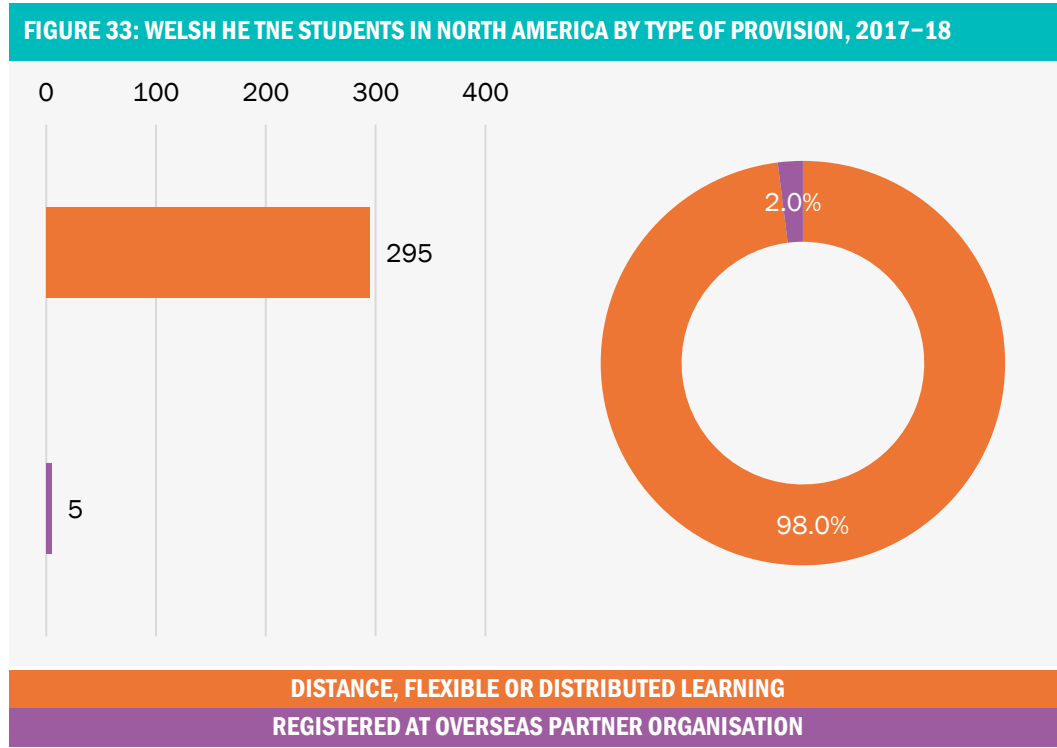


FIGURE 34 shows that between 2013–14 and 2017–18 there was an increase in students studying through distance, flexible and distributed learning and a decrease in students registered at an overseas partner organisation reported by Welsh providers in North America.

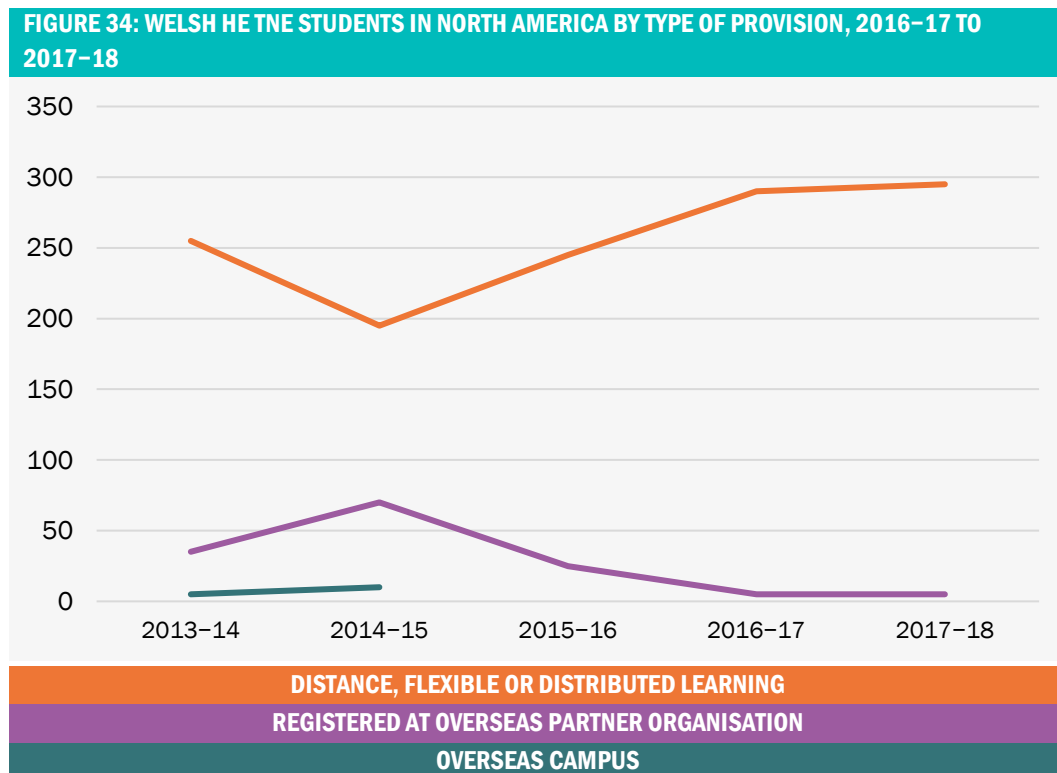


FIGURE 35 shows that 84.1% of TNE students reported by Welsh institutions in 2017–18 in North America were studying at postgraduate level, against 15.9% at undergraduate level. **FIGURE 36** shows that between 2013–14 and 2017–18 there was an increase in the numbers of students studying at the postgraduate level and a decrease in the numbers of students studying at the undergraduate level.

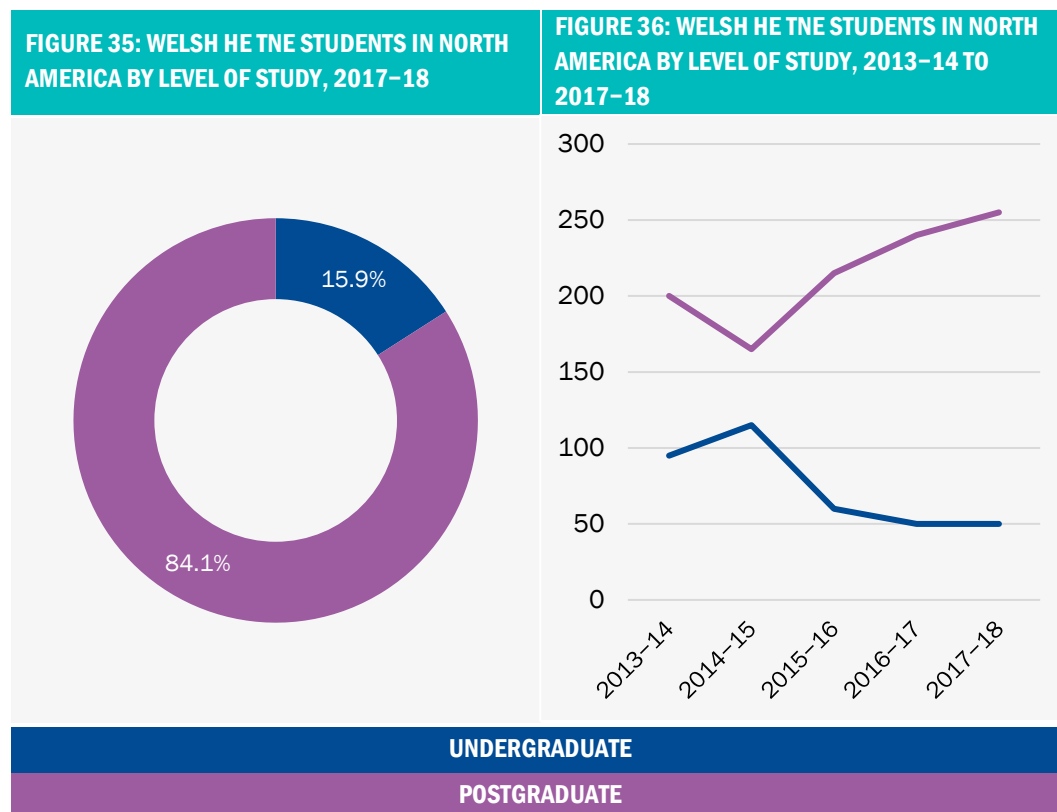


TABLE 11 shows the five **North American** countries hosting the most TNE students from Welsh providers in 2017–18. Canada, St. Lucia and St Vincent and the Grenadines have a higher relative position than for the rest of the UK, while Trinidad and Tobago has a lower relative position. The United States has the same leading position.

TABLE 11: TOP FIVE HOST COUNTRIES OF WELSH HE TNE STUDENTS IN NORTH AMERICA, 2017–18		
Host country	Students	%
United States	85	28.9%
Canada	85	28.2%
Trinidad and Tobago	80	26.9%
St. Lucia	10	3.0%
St. Vincent and the Grenadines	10	2.7%

South America

FIGURE 37 shows that all TNE students reported by Welsh providers in South America were studying through distance, flexible and distributed learning.

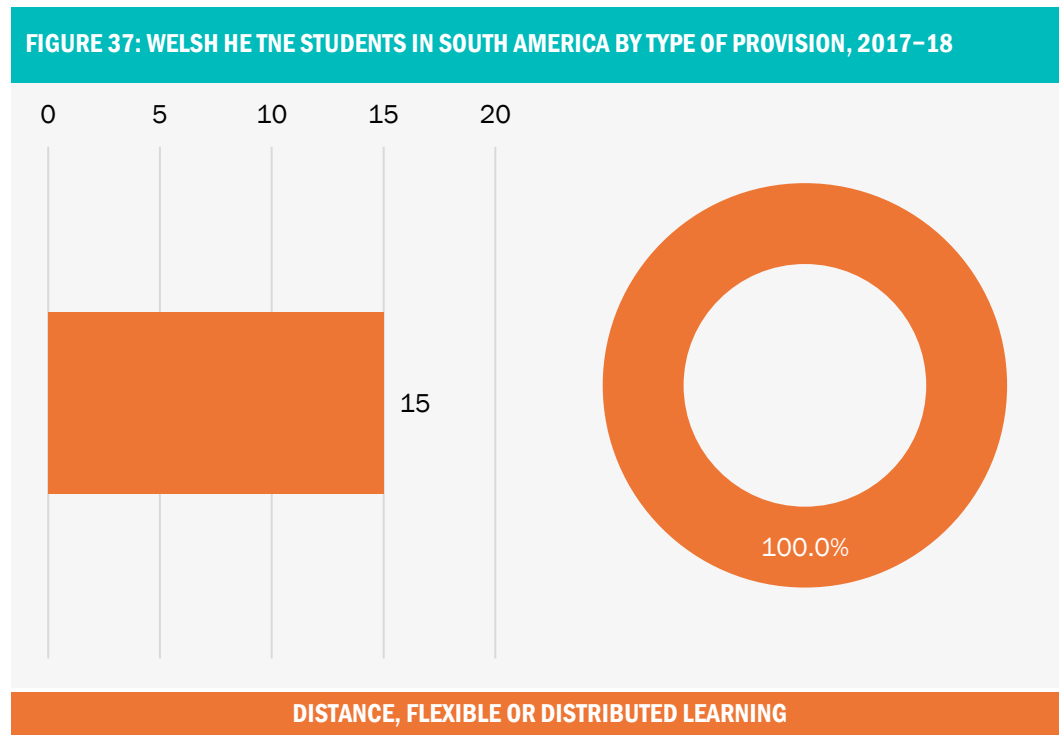


FIGURE 38 shows that between 2013–14 and 2017–18 there was an increase in students studying through distance, flexible or distributed learning reported by Welsh providers in South America.

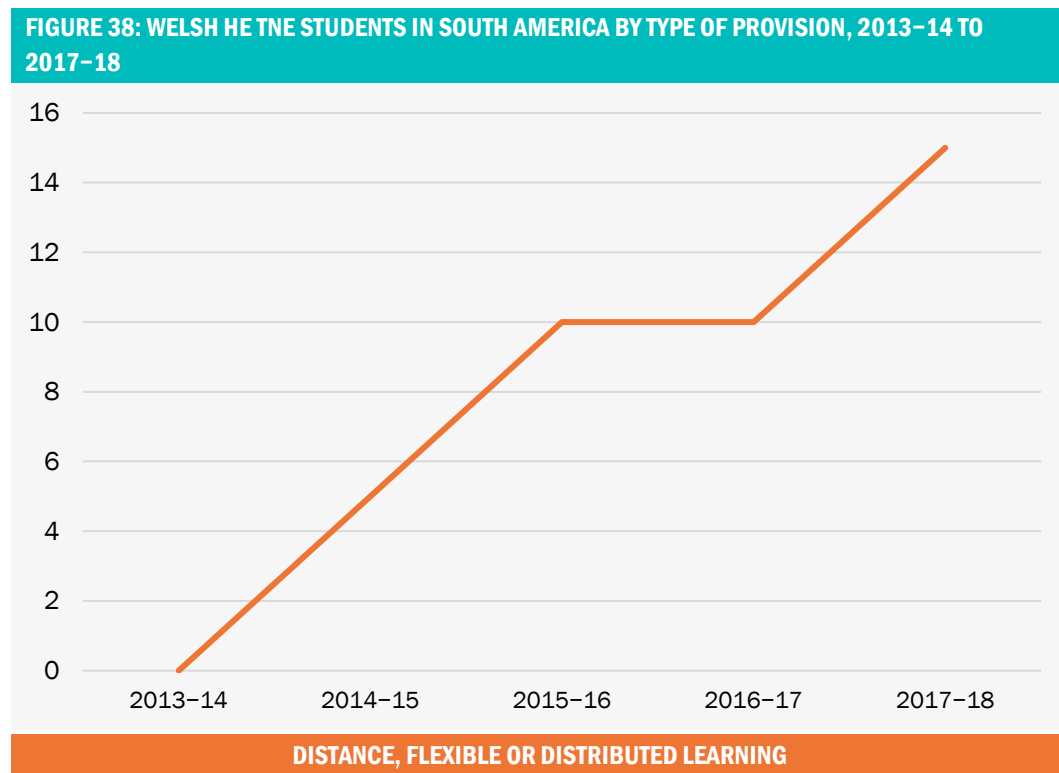


FIGURE 39 shows that all TNE students reported by Welsh institutions in 2017–18 in South America were studying at postgraduate level. **FIGURE 40** shows that between 2014–15 and 2017–18 there was an increase in the number of students studying at postgraduate level.

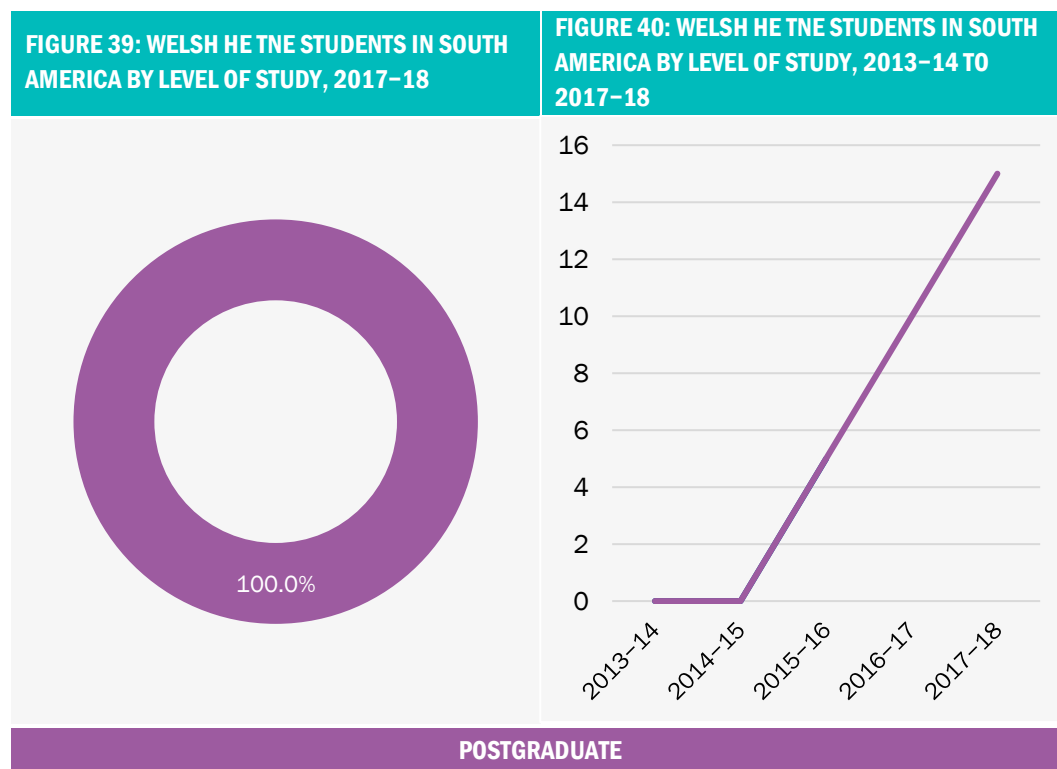


TABLE 12 shows the five **South American** countries hosting the most TNE students from Welsh providers in 2017–18. Colombia and Chile have a higher relative position than for the rest of the UK, while Guyana has a lower relative position. Brazil and Argentina have the same position.

TABLE 12: TOP TWO HOST COUNTRIES OF WELSH HE TNE STUDENTS IN SOUTH AMERICA, 2017–18

Host country	Students	%
Brazil	5	..
Colombia	5	..
Chile
Guyana
Argentina

Conclusions

Welsh providers are responsible for almost double the proportion of the UK's total TNE student population (8.1%) than they are for the proportion of international students studying in the UK (4.6%).

Between 2013–14 and 2017–18 TNE student numbers grew at a faster rate at Welsh institutions (34.5%) than in the UK as a whole (19.9%).

A larger proportion of Welsh providers reported more than 1,000 students in TNE in 2017–18 (55.5%) than in the UK (51.4%).

In 2017–18, Welsh providers reported a larger proportion of students studying through collaborative provision (47.2%) and through distance, flexible or distributed learning (23.1%) compared to the proportion reported by all UK providers (44.3% and 20.7% respectively).

In 2017–18, a smaller proportion of students were registered at an overseas partner organisation (20.9%) or studying at an overseas campus (2.5%) compared to the proportion reported by all UK providers (24.5% and 8.5% respectively).

Between 2013–14 and 2017–18 postgraduate TNE provision grew at a faster rate in Wales (72.1% growth) than in the UK as a whole (25.4%).

Asia hosted the largest proportion of Welsh providers' TNE students (40.9%) in 2017–18, although this was smaller than the proportion for the UK as a whole (52.3%).

The percentage of TNE students in Other European Union (28.5%), Africa (16%) and in the Middle East (13.1%) was larger among Welsh providers than in the UK as a whole in 2017–18 (14.8%, 13.1% and 11.4% respectively).