

2015 A YEAR IN DATA

International student destinations – diversification markets

Overview

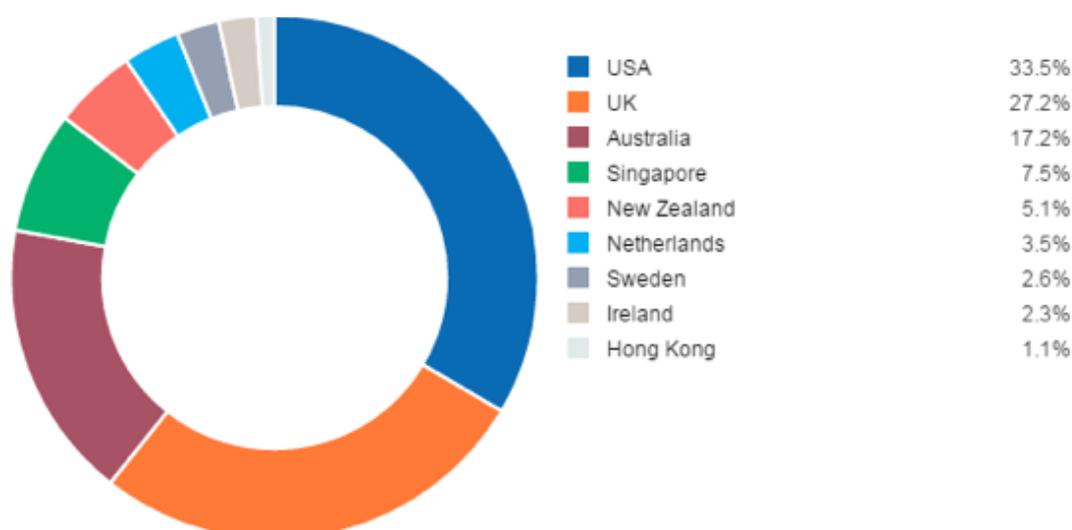
In late 2015, we launched an **Insights Tool** which allows users to track, search and delve into the traffic of prospective students looking to study across the globe. The data in the tool goes back to November 2014, so we now have over 14 months of international insight. In 2015, there were **23,000,000 users to the Hotcourses international websites** from across the globe, which informs this report.

This, the first in a series of White Papers, focuses particularly on shining a light on insights from **diversification markets including Thailand, Indonesia, Vietnam, Brazil, Malaysia, Saudi Arabia and Egypt**. In the coming months we will supplement this with individual market reports to better understand demand to study overseas from key countries.

Based on these diversification markets, the report focuses on the demand and interest from prospective students **looking at study in Australia, Hong Kong, Ireland, Netherlands, New Zealand, Singapore, Sweden, the United Kingdom and the United States**. This paper has sections dedicated to the demand for study in to the biggest and most established destinations; the United States, Australia and the United Kingdom.

Our results show that during 2015 **the United States (33.5%) remains the most popular destination** for searches, followed by the **United Kingdom (27.2%)** and **Australia (17.2%)**.

STUDY DESTINATIONS

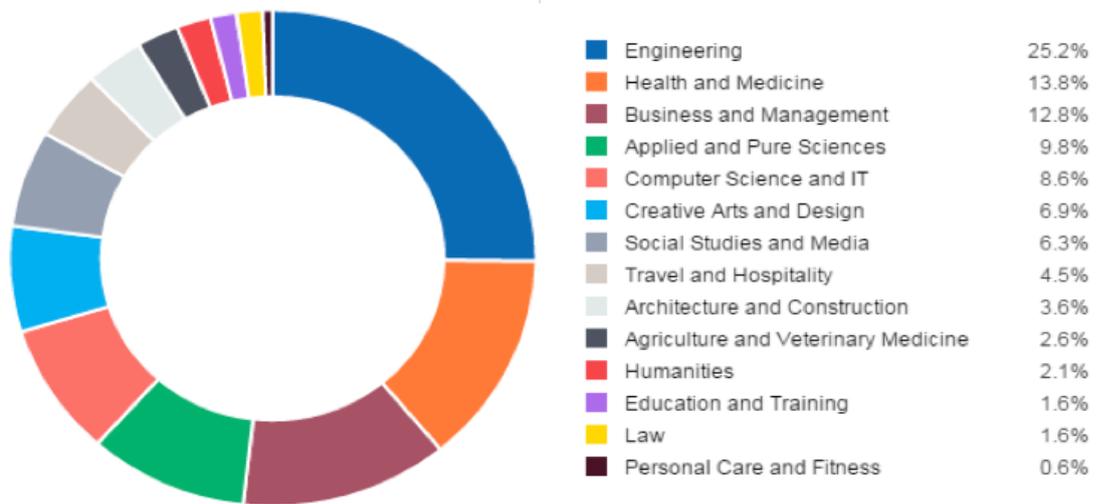


There is a healthy split between users looking for **postgraduate courses (56.8%)** and **undergraduate courses (36.6%)** and finally specific **vocational courses (6.6%)**.

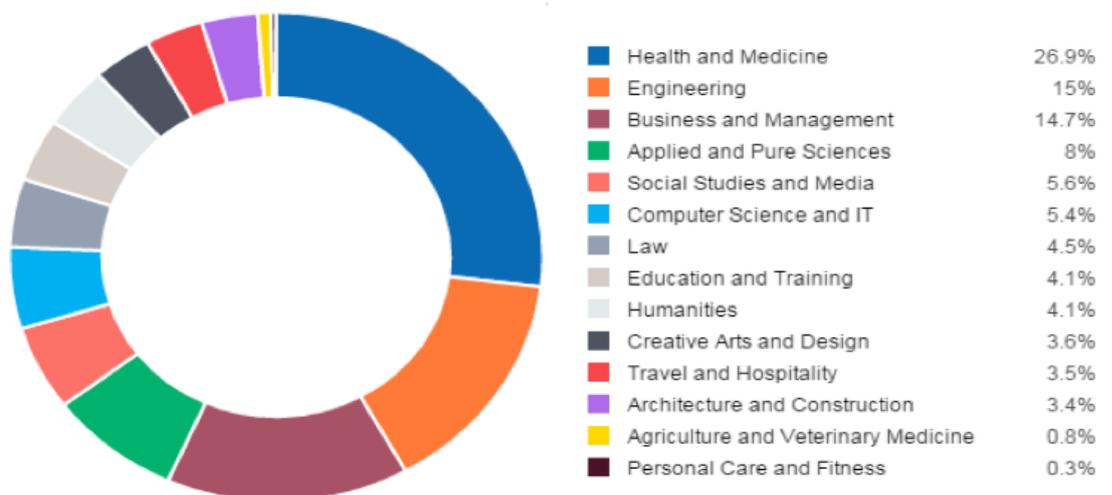
Subject choice

There are some notable country differences in the preferred subjects which prospective students are searching for, with Engineering, Health and Medicine and Business and Management the top choice in different countries:

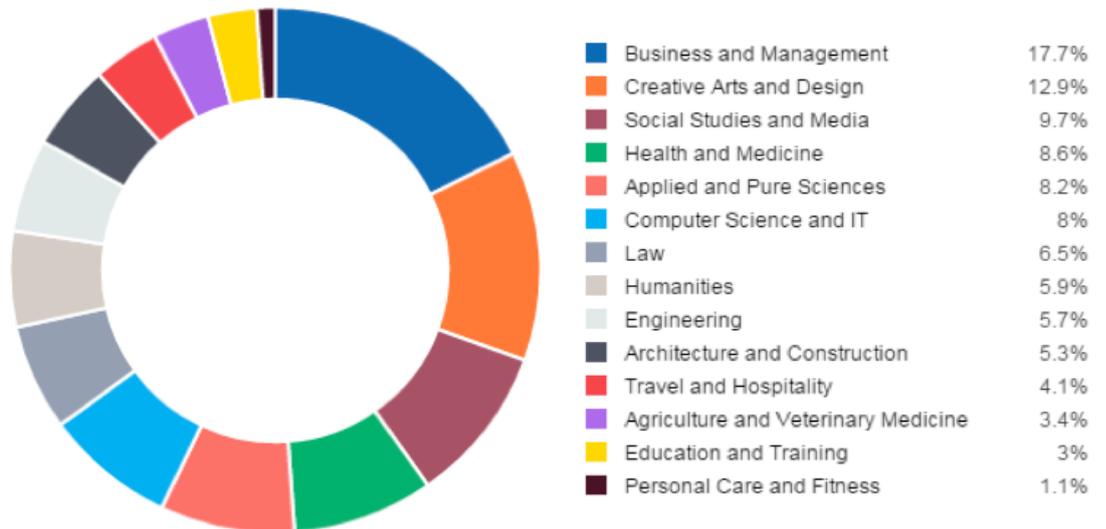
SEARCHES FROM INDIA



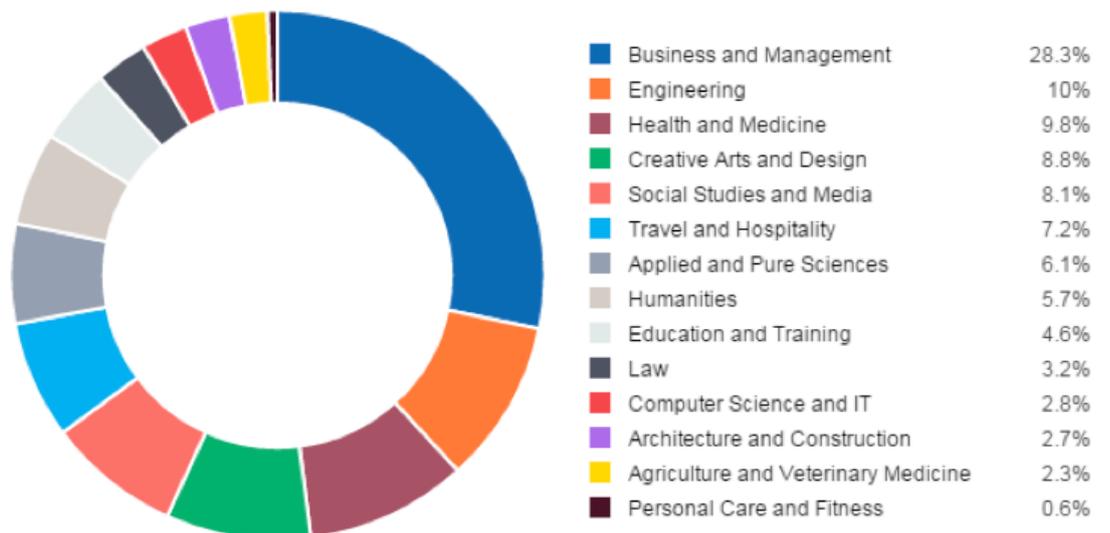
SAUDI ARABIA



RUSSIA



THAILAND



Key market profiles

AUSTRALIA

In 2015, Australia was the third most popular destination country for users of Hotcourses international websites, with 17.2% traffic searching for study there. In total, Australia received around 3.35m searches in 2015. But from our diversification markets specifically, and the data we are using to inform this report, this encompasses just over 1.5m searches to Australia in 2015 from diversification markets.

For the purpose of this report, we have defined a diversification market as a country which current constitutes less than 10% of students in a country. For Australia this removes China and India.

Top 5 diversification countries searching for study in Australia during 2015:

COUNTRY	2015 OVERALL	JAN – JUN	JUL - DEC
1) Vietnam	16.6%	17.5%	15.5%
2) Indonesia	13.4%	15.4%	11.5%
3) Thailand	11.1%	11.0%	11.1%
4) Brazil	6.5%	6.4%	6.5%
5) Saudi Arabia	2.4%	2.7%	2.2%

Three trends are emerging prominently over 2015 for students looking at Australia:

- Although on the Hotcourses websites, Vietnam remains the country where the highest proportion of students are looking to study in Australia this proportion starts to decline as the year progresses (from 17.5% to 15.5%). This demonstrates that whilst students from Vietnam are still looking at Australia in significant numbers, they are also doing wider research looking at a range of countries.
- There is a significant decline in the proportion of students from Indonesia exploring study in Australia (from 15.4% to 11.5%). In the early part of 2015, there had been a number of high profile news stories where asylum seekers from Indonesia were refused entry to Australia, and this appears to have filtered through into the extent to which prospective students wish to study in that country.

- As the year progresses, there is a small decrease in prospective students from Saudi Arabia looking at study in Australia (from 2.7% to 2.2%). There was a similar decrease in Saudi prospective students looking at the US through 2015 (41.1% to 38.7%), but a noticeable increase in interest in New Zealand (from 5% to 6.4%). In May 2015, the Saudi government announced plans to send 350 students to study in New Zealand as a result of strengthened ties between the countries, in part through the King Abdullah Scholarship Program.

It is also worth noting that at the start of 2015, 41.1% of searches to Australia were concentrated from just 3 diversification markets. By the end of 2015, this had reduced to 38% demonstrating that there is an increasingly diverse range of countries searching for study there.

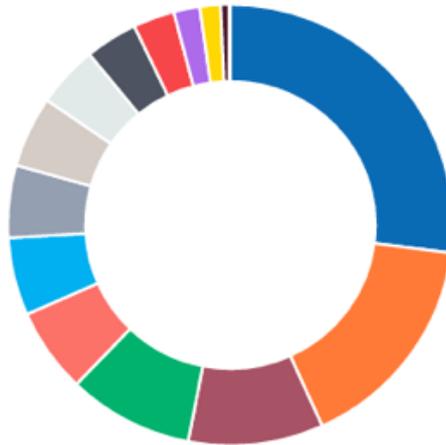
Subject mix

There are some interesting regional variations in subject preferences for particular markets looking to study in Australia.

VIETNAM

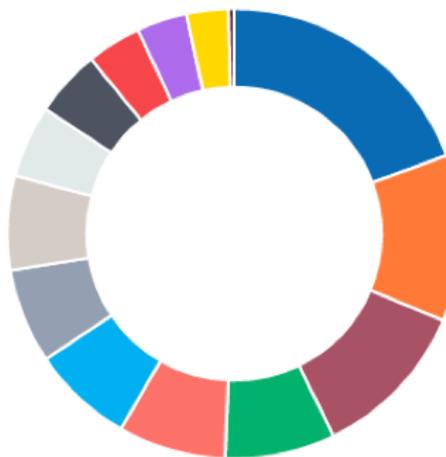


INDIA



Engineering	27%
Health and Medicine	16.2%
Business and Management	9.8%
Applied and Pure Sciences	9.1%
Travel and Hospitality	6.2%
Creative Arts and Design	5.7%
Computer Science and IT	5.3%
Social Studies and Media	5.2%
Architecture and Construction	4.5%
Agriculture and Veterinary Medicine	3.8%
Humanities	3%
Education and Training	1.9%
Law	1.5%
Personal Care and Fitness	0.6%
IT	0.1%

INDONESIA



Health and Medicine	19.4%
Social Studies and Media	12%
Business and Management	11.5%
Engineering	7.9%
Applied and Pure Sciences	7.7%
Humanities	7.3%
Education and Training	6.8%
Creative Arts and Design	6.8%
Travel and Hospitality	5.2%
Computer Science and IT	4.8%
Agriculture and Veterinary Medicine	3.9%
Architecture and Construction	3.6%
Law	3%
Personal Care and Fitness	0.4%

RUSSIA



Social Studies and Media	12.6%
Health and Medicine	11.9%
Travel and Hospitality	9.1%
Creative Arts and Design	9.1%
Agriculture and Veterinary Medicine	8.4%
Applied and Pure Sciences	8.4%
Business and Management	8.4%
Law	7%
Architecture and Construction	6.3%
Engineering	4.9%
Humanities	4.9%
Computer Science and IT	4.2%
Education and Training	2.8%
Personal Care and Fitness	2.1%

UNITED STATES

The United States was the **most popular country** searched for from prospective students in diversification markets throughout 2015 (**33.5%**), which equates to just over **3m** searches from these countries in 2015. There is a marginal slip in the proportion of demand for the United States through 2015 from 33.7% (January – June) to 33.2% (July – December), but it remains the most searched for country.

Top 5 diversification countries searching for study in the United States:

COUNTRY	2015 OVERALL	JAN-JUN	JUL-DEC
1 – Brazil	15.6%	16.0%	15.2%
2 – Vietnam	9.9%	10.0%	9.6%
3 – Thailand	6.7%	6.5%	7.0%
4 – Indonesia	5.2%	6.1%	4.5%
5 – Saudi Arabia	4.4%	5.0%	4.2%

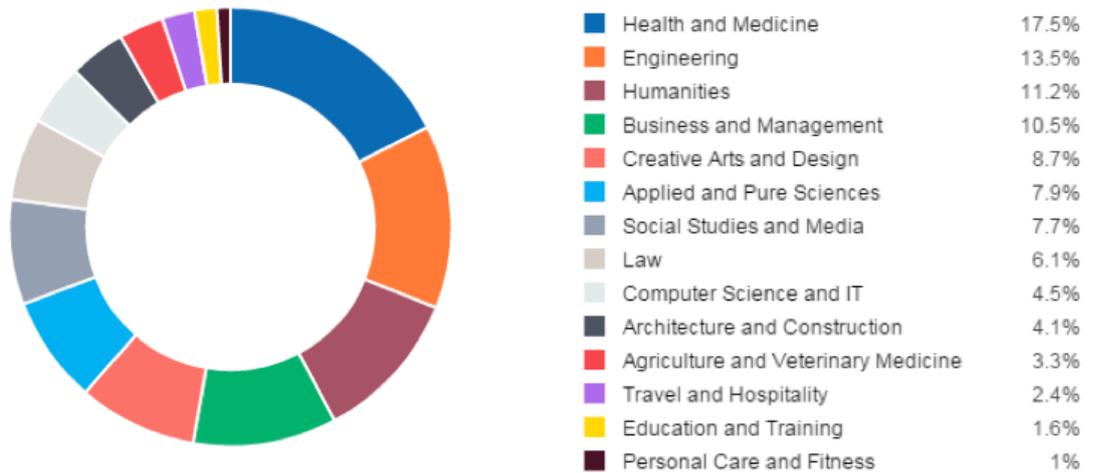
Three trends are emerging from the searches looking at the United States:

- **0.8% drop** (16% - 15.2%) in searches from **Brazil** looking at the United States through 2015. In part, this is likely explained by the ending of the Brazil Science without Borders initiative which had been specifically supporting mobility from Brazil to the USA.
- Over 2015 there has been a **1.6% fall** in searches from **Indonesian** students looking at the United States. This has largely come at the expense of the UK, who has seen a 3.8% increase from Indonesia during the same period (in a basket of countries alongside the UK, Australia & NZ).
- Although not a diversification market, over 2015 there was a strong **upsurge in demand from India** looking at the United States. According to our statistics, in a basket of the USA, UK, Australia & New Zealand, India increased from a 41.4% to 46.2% share of searches from India (largely at the expense of the UK which has fallen from 27.4% to 18.4% in the same year).

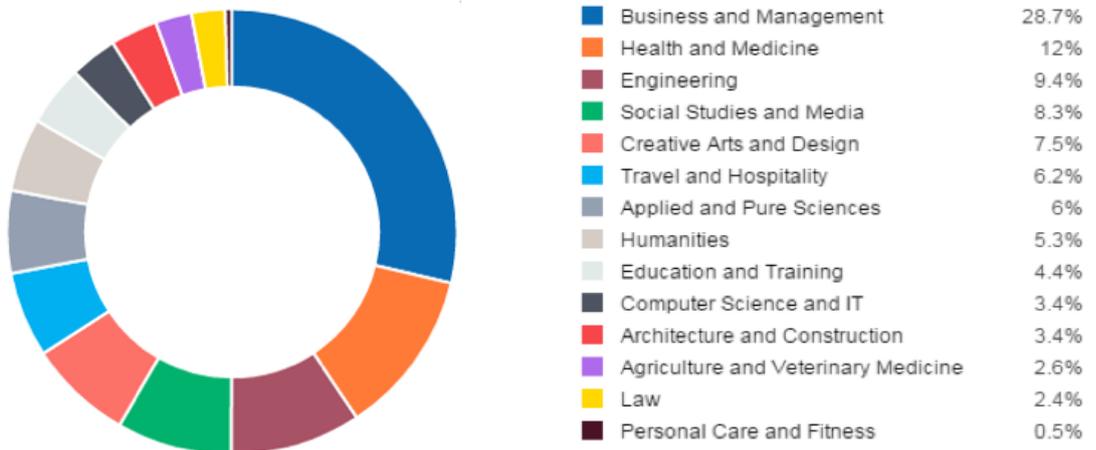
Subject mix

The most searched for subjects for students looking at the United States, can vary by origin country.

BRAZIL



THAILAND

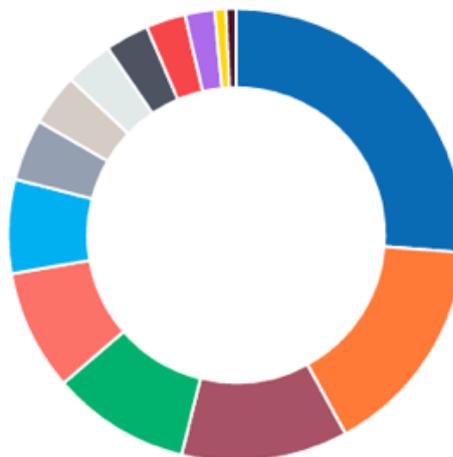


INDONESIA



Business and Management	18.7%
Health and Medicine	16.7%
Social Studies and Media	11.6%
Engineering	9.4%
Applied and Pure Sciences	7.9%
Creative Arts and Design	6%
Education and Training	6%
Computer Science and IT	5.9%
Humanities	4.3%
Travel and Hospitality	4%
Architecture and Construction	3.3%
Agriculture and Veterinary Medicine	2.8%
Law	2.7%
Personal Care and Fitness	0.7%

VENEZUELA



Health and Medicine	26.2%
Engineering	15.8%
Creative Arts and Design	11.8%
Business and Management	9.8%
Social Studies and Media	8.6%
Applied and Pure Sciences	6.7%
Architecture and Construction	4.4%
Law	3.7%
Humanities	3.4%
Travel and Hospitality	3.1%
Computer Science and IT	2.8%
Agriculture and Veterinary Medicine	2.1%
Education and Training	0.8%
Personal Care and Fitness	0.7%

UNITED KINGDOM

The UK was second most searched for destination across the Hotcourses websites in 2015, with 27.2% of searches looking for study there. This accounts for just over 2.4m searches from diversification markets during 2015.

The top 5 diversification markets looking at the UK are:

COUNTRY	2015 OVERALL	JAN-JUN	JUL-DEC
1 – Thailand	13.3%	13.4%	13.4%
2 – Indonesia	11.1%	11.9%	10.3%
3 – Vietnam	7.0%	7.4%	6.5%
4 – Brazil	6.8%	7.5%	6.3%
5 – Saudi Arabia	4.2%	4.5%	4.2%

Three trends emerging from searches in the United Kingdom over 2015:

- Although over the course of 2015, Indonesia represented a diminishing proportion of the searches looking at the United Kingdom, and therefore on the surface might appear to be a diminishing area for the UK. However it still represents a very buoyant market when compared against the USA, Australia and NZ. Indeed in a basket with those other countries, the UK sees an increase from 37.3% to 41.1% in searches from Indonesia from the first to the second half of 2015, this would indicate Indonesia students are looking beyond the traditional countries of USA, Australia and NZ.
- Across all top 10 major destination countries the UK either flatlines or loses its share of searches from prospective students. This is in keeping with recent HESA data which shows the UK with a diminishing number of enrolments in 6 of its top 10 source countries. In the first half (January – June) of 2015, the UK received 27.5% of searches across all websites, this reduces to 26.9% by the second half of the year (July – December), an in-year fall of -0.6%.
- Over the course of 2015, the share of searches from Brazil which the UK is receiving falls from 7.5% to 6.3%. This is replicated when the UK is placed in a specific basket alongside Australia, the USA and New Zealand. Indeed the UK is the only country to lose its share of searches from Brazil:

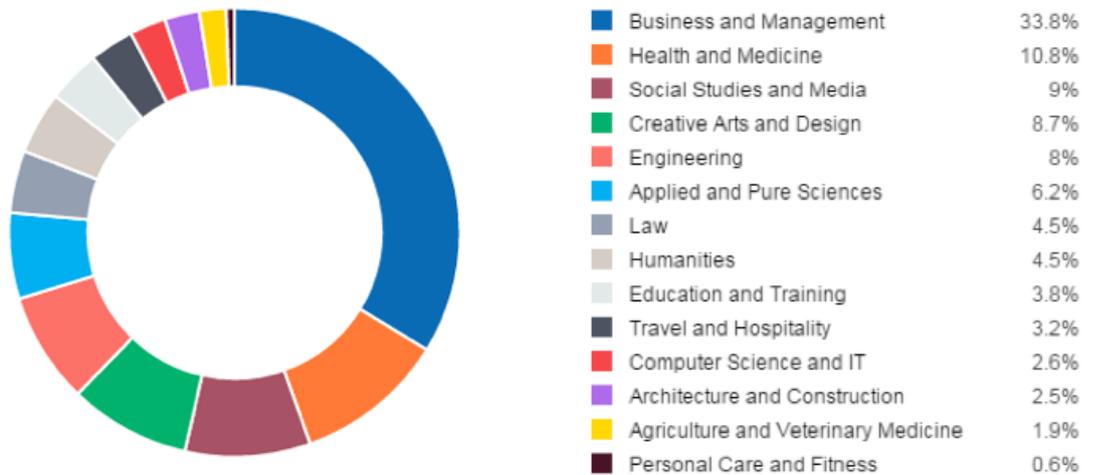
Brazilian demand for Australia, USA, UK & New Zealand

	2015 AVERAGE	JAN-JUN	JUL-DEC	% CHANGE
USA	60.9	60.1	61.1	+ 1.0
UK	21.6	23.0	20.5	-2.5
Australia	13.0	12.5	13.4	+0.9
New Zealand	4.6	4.5	5.0	+0.5

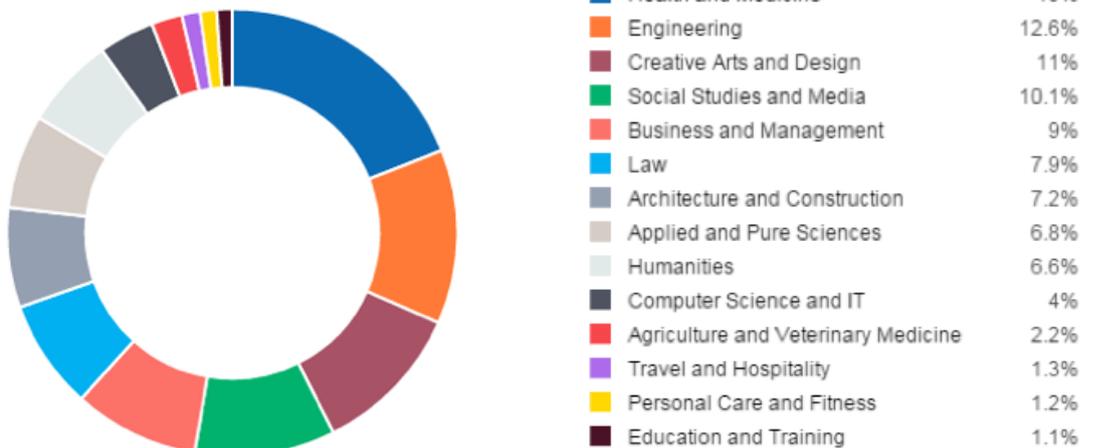
Subject mix

Typically Business and Management and Health and Medicine are the most popular subjects for students looking at the UK, but it varies by source country.

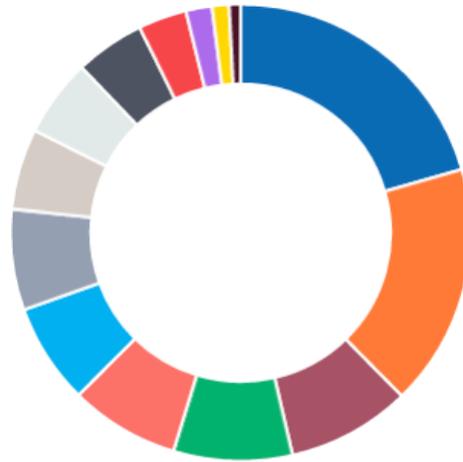
THAILAND



BRAZIL

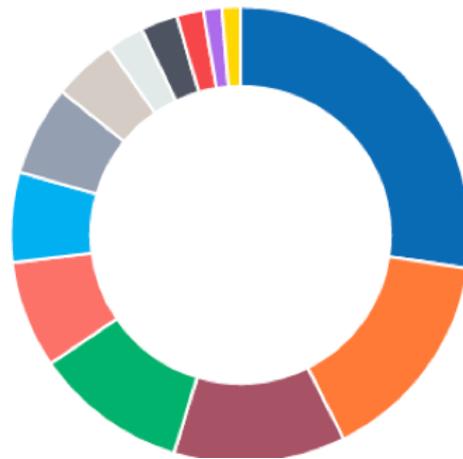


RUSSIA



Business and Management	20.5%
Creative Arts and Design	17.1%
Law	8.7%
Humanities	8.3%
Social Studies and Media	7.7%
Architecture and Construction	7.1%
Applied and Pure Sciences	7.1%
Health and Medicine	5.7%
Engineering	5.5%
Computer Science and IT	4.9%
Travel and Hospitality	3.4%
Education and Training	1.8%
Personal Care and Fitness	1.2%
Agriculture and Veterinary Medicine	0.8%

KENYA



Health and Medicine	27.4%
Business and Management	15.3%
Computer Science and IT	12.1%
Engineering	10.8%
Social Studies and Media	7.6%
Humanities	6.4%
Applied and Pure Sciences	6.4%
Architecture and Construction	4.5%
Law	2.6%
Agriculture and Veterinary Medicine	2.6%
Travel and Hospitality	1.9%
Education and Training	1.3%
Personal Care and Fitness	1.3%

If you would like further information on the Hotcourses Insights Tool, please contact the Insights Team at insights@hotcourses.com