



# Brexit Report

How has global demand  
for higher education  
shifted over the last 12  
months?

24th JUNE 2015 – 23rd JUNE 2016  
vs 24th JUNE 2016 – 23rd JUNE 2017

# 1 Year on from Brexit

## Introduction

This report examines patterns and shifts in demand exactly one year on from the UK's decision to vote to leave the European Union on June 23rd 2016. Comparing demand for the 12 months between **24th June 2015 – 23rd June 2016 vs 24th June 2016 – 23rd June 2017**.

As well as examining shifts in global demand, this report also focuses on specific shifts from across Europe as a whole as well as specific countries including Germany, Poland, France and Spain.

Finally, the report also includes how demand has changed from 5 non-EU regions over the last 12 months including India, Thailand, Brazil, the Middle East and Mexico.

## Executive summary

Comparing the 12 months since the referendum with the 12 months before the vote we can see a small shift away from US and UK, but this varies in different parts of the globe.

Over the last 12 months, the US has been particularly hard hit from the Middle East and the UK is particularly hard hit from Europe. Although not exclusively, this is clearly in large part due to the two biggest political events over the last 12 months: the election of President Donald Trump and Brexit.

In that same time, there has been a steady growth in demand for Canada. Ireland have also benefitted from an upturn in interest, particularly from prospective European students.

- The **USA** has **fallen** from 35.7% of **global** share to 31.9%
- The **UK** has **fallen** from 28% of **global** share to 25.6%
- **Canada** has **increased** from 4.9% of **global** share to 10.6%
  
- The **UK** has **fallen** from 36.9% of **European** share to 30.7%
- **Ireland** has **increased** from 11.4% of **European** share to 20.9%
  
- The **US** has fallen from 36.4% of **Indian** share to 27%
- **Canada** has increased from 7.7% of **Indian** share to 22.6%
- The **UK** has decreased from 33.5% of **Middle Eastern** share to 33.4%, but is marginally up in Saudi Arabia

## Key findings and opportunities

Canada has seen a surge in global demand over the last 12 months, increasing its global share from 4.9% to 10.6%. In India, it has increased to over 20% of global searches, and in 2017 is now the most searched for destination country. Clearly the early moves from the Trudeau government to be a more welcoming destination for international students is paying immediate dividends, capitalising on a downturn in US demand.

The UK has seen a small decline in demand in the 12 months since the EU referendum (from 28% to 25.6%). Perhaps unsurprisingly, the UK has seen a bigger fall in the share from European demand compared to non-EU demand. Non-EU demand is proving more resilient than recent years.

Although still comfortably the most searched for global destination, since the election of President Trump there has been a decline in interest in the USA. Following the proposed travel ban, there has been a particular decline in interest to the USA from predominantly Muslim countries.

# Global demand

## 7 leading english language destinations

This first graph shows how demand from all global users across the Hotcourses Group sites have changed when looking at the 7 leading English language destinations (US, UK, Australia, New Zealand, Canada, Netherlands and Ireland).

### 24th June 2016 – 23rd June 2017

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
USA	35.7	31.9
UK	28.0	25.6
Australia	19.2	18.2
New Zealand	5.6	6.1
Canada	4.9	10.6
Netherlands	4	4.2
Ireland	2.7	3.4

The headlines in global demand are the shifts away from the USA (35.7% to 31.9%) and the UK (28% to 25.6%) and the notable growth in Canada (4.9% to 10.6%).

### Global demand



# Undergraduate vs Postgraduate shifts

We can see from the pie charts below there are some interesting comparisons between shifts in undergraduate interest and postgraduate interest.

The USA has seen similar falls in interest at both UG and PG level when examining global demand, but remains the most searched for destination.

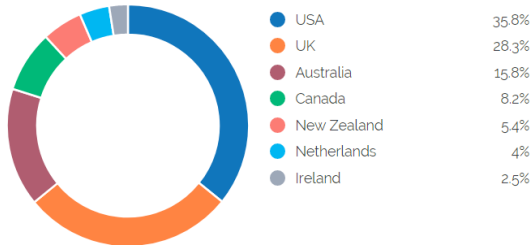
When looking at European demand only at postgraduate level, whilst the UK drops it still holds on to the top position. But there is a significant rise for Ireland.

## Undergraduate only (all global demand)

2015 - 2016

Study destinations ?

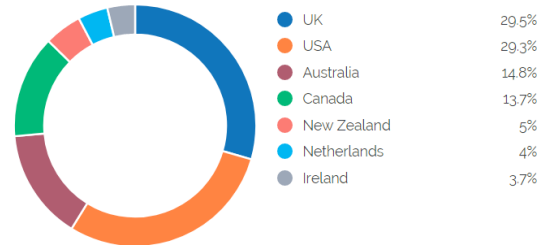
1,504,336 students



2016 - 2017

Study destinations ?

2,011,818 students

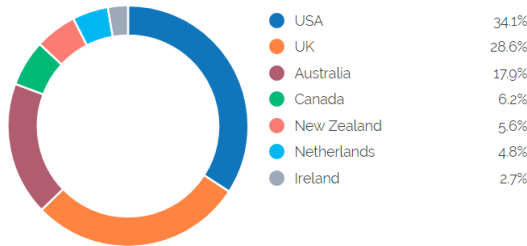


## Postgraduate only (all global demand)

2015 - 2016

Study destinations ?

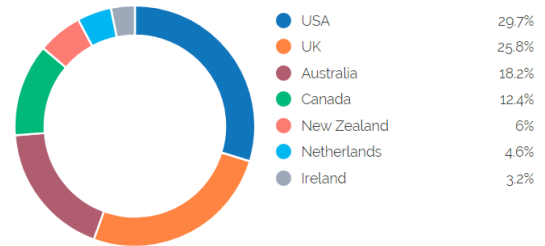
2,189,446 students



2016 - 2017

Study destinations ?

2,928,113 students

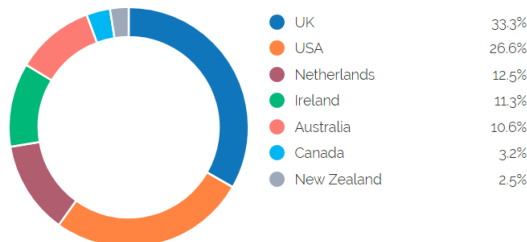


## Postgraduate only (european demand only)

2015 - 2016

Study destinations ?

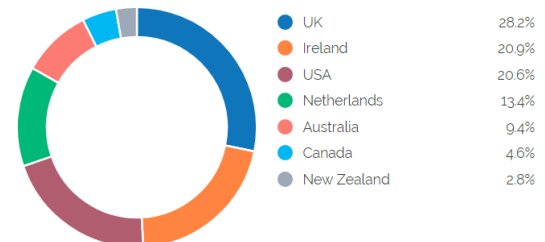
93,245 students



2016 - 2017

Study destinations ?

135,531 students



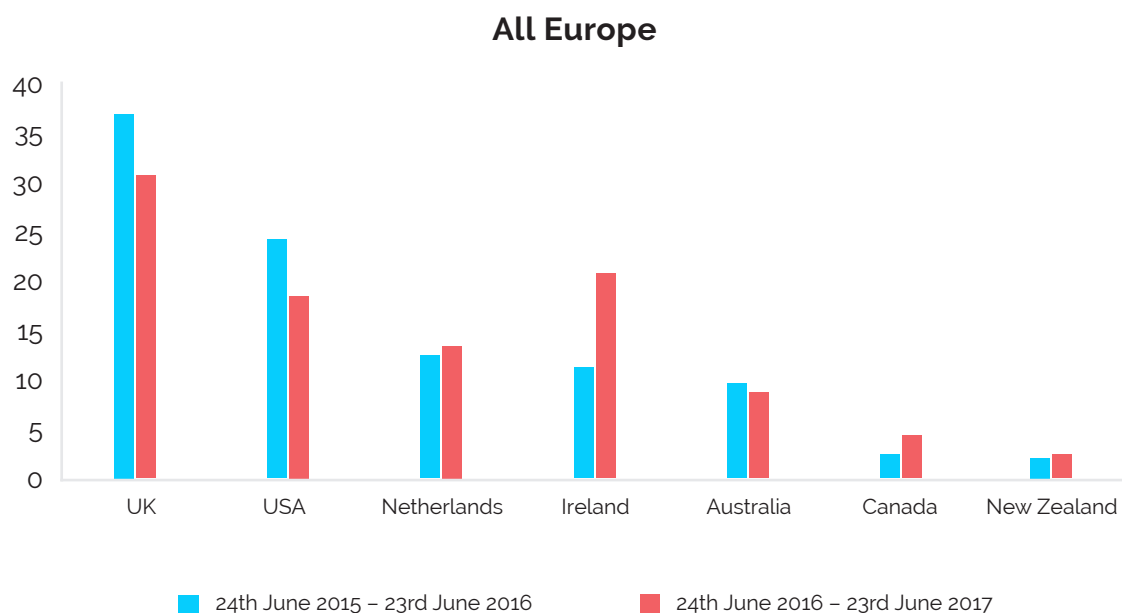
# European demand

## 7 leading english language destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
UK	36.9	30.7
USA	24.3	18.6
Netherlands	12.6	13.6
Ireland	11.4	20.9
Australia	9.8	9.0
Canada	2.7	4.6
New Zealand	2.3	2.7

Given Brexit, it is perhaps not surprising that the UK sees a bigger drop in European demand (36.9% to 30.7%) compared to what we see in the global demand at the top of the report (28% to 25.6%).

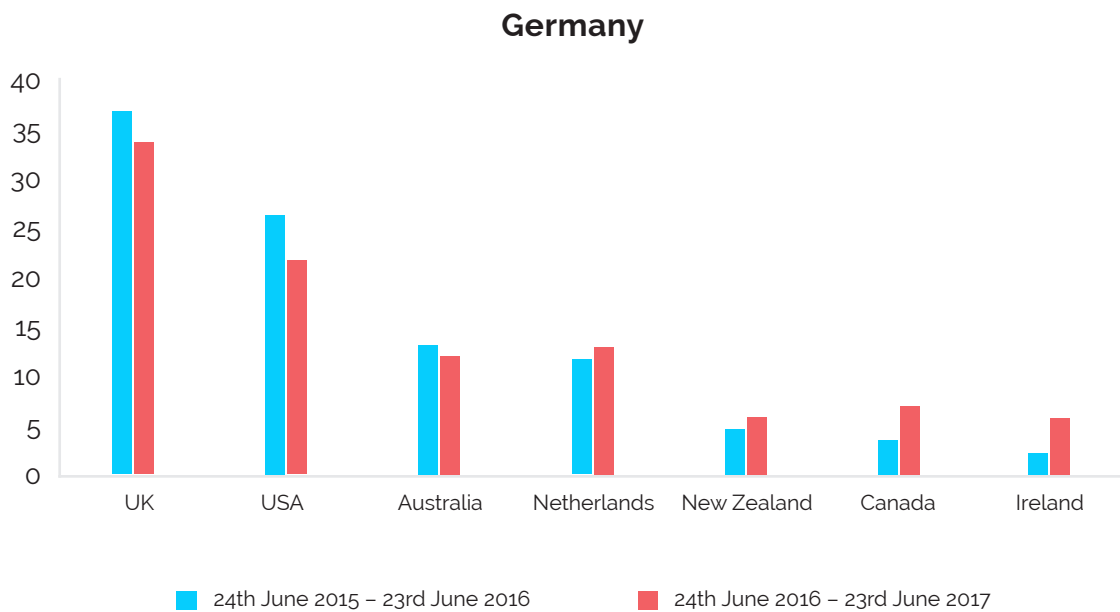
Interestingly whilst at a global level there is not an obviously noticeable increased interest in Ireland, at a European level there is a significant growth from 11.4% to 20.9% moving into the second most searched for destination from European students (above the US).



# Germany

## 7 leading english language destinations

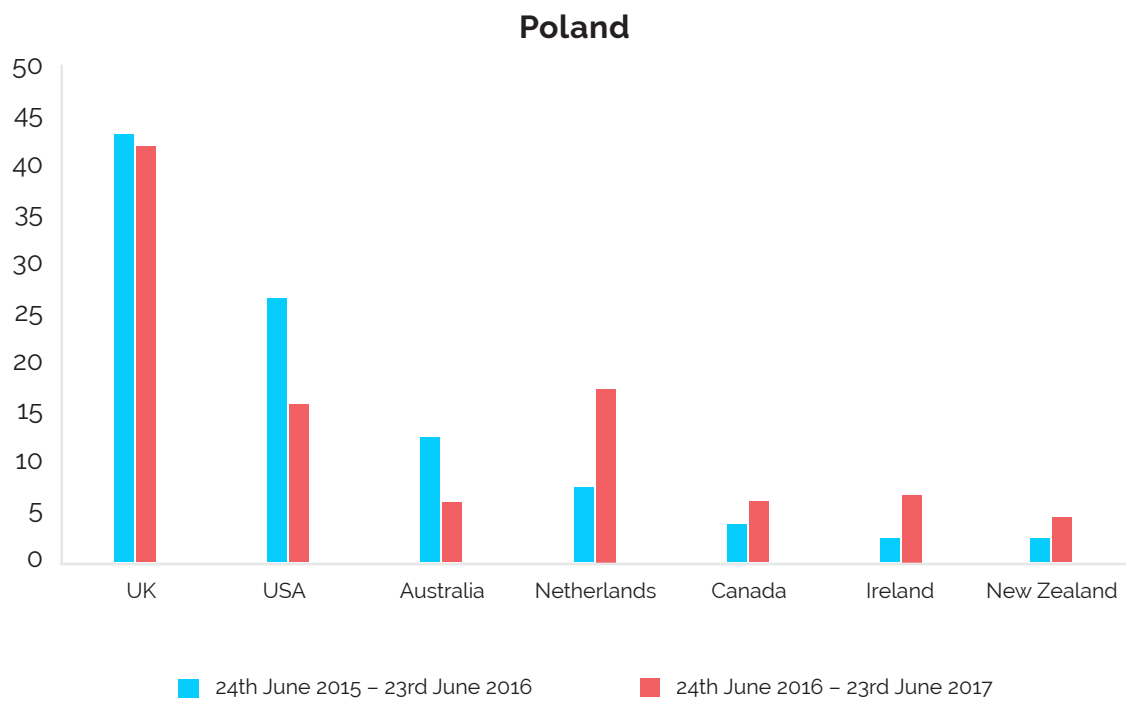
	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
UK	37.0	34
USA	26.5	22
Australia	13.6	12.2
Netherlands	12.0	13.1
New Zealand	4.7	6
Canada	3.6	7.0
Ireland	2.5	5.8



# Poland

## 7 leading english language destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
UK	43.6	42.3
USA	26.9	16.2
Australia	12.8	6.2
Netherlands	7.7	17.7
Canada	3.8	6.2
Ireland	2.6	6.9
New Zealand	2.6	4.6



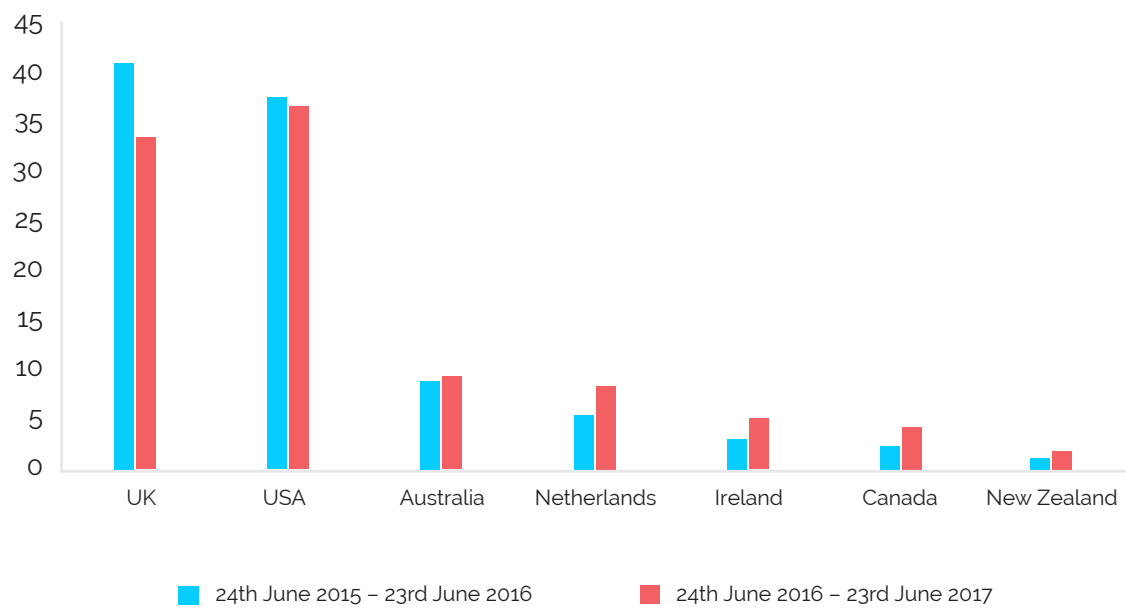


# Spain

## 7 leading english language destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
UK	40.7	33.4
USA	37.4	36.5
Australia	9.0	9.6
Netherlands	5.7	8.6
Ireland	3.3	5.3
Canada	2.6	4.5
New Zealand	1.4	2.1

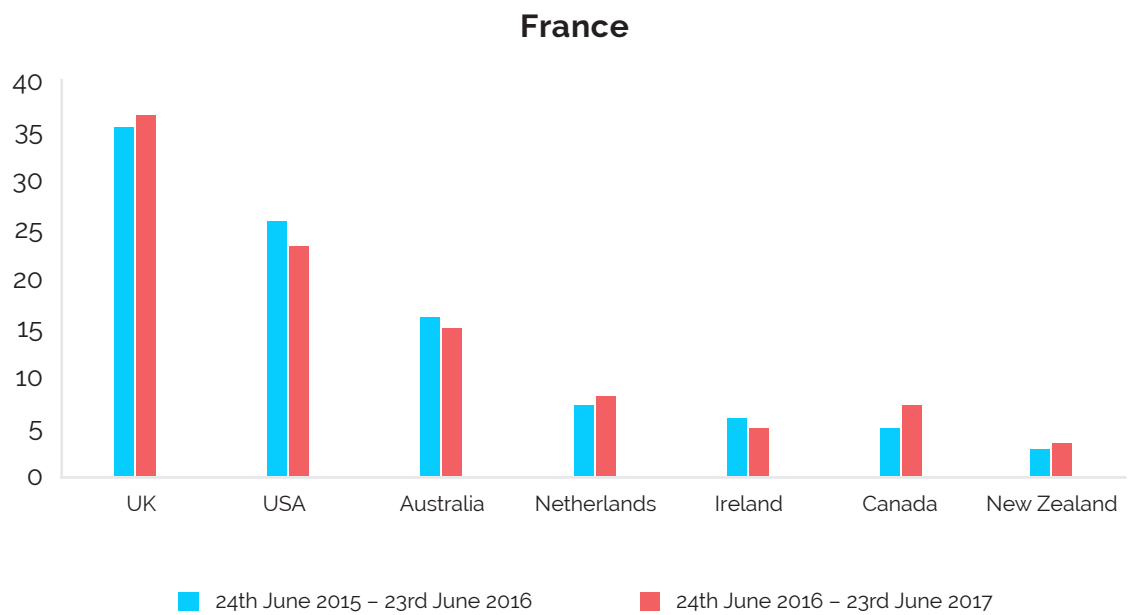
### Spain



# France

## 7 leading english language destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
UK	35.7	36.9
USA	26.2	23.6
Australia	16.4	15.2
Netherlands	7.4	8.1
Ireland	6.2	5.2
Canada	5.3	7.4
New Zealand	2.9	3.6



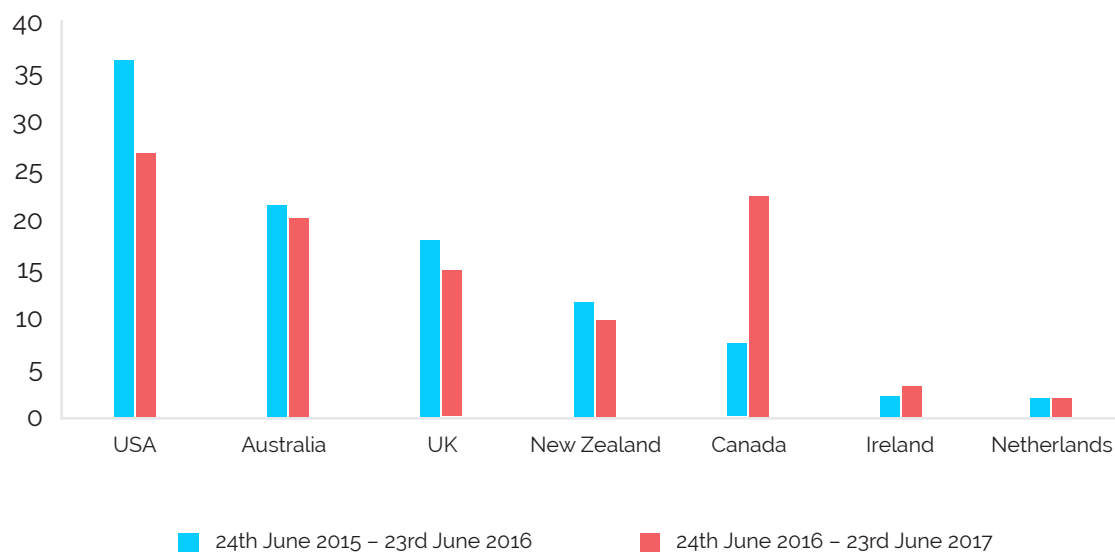
Non-EU demand –  
individual countries

# From India

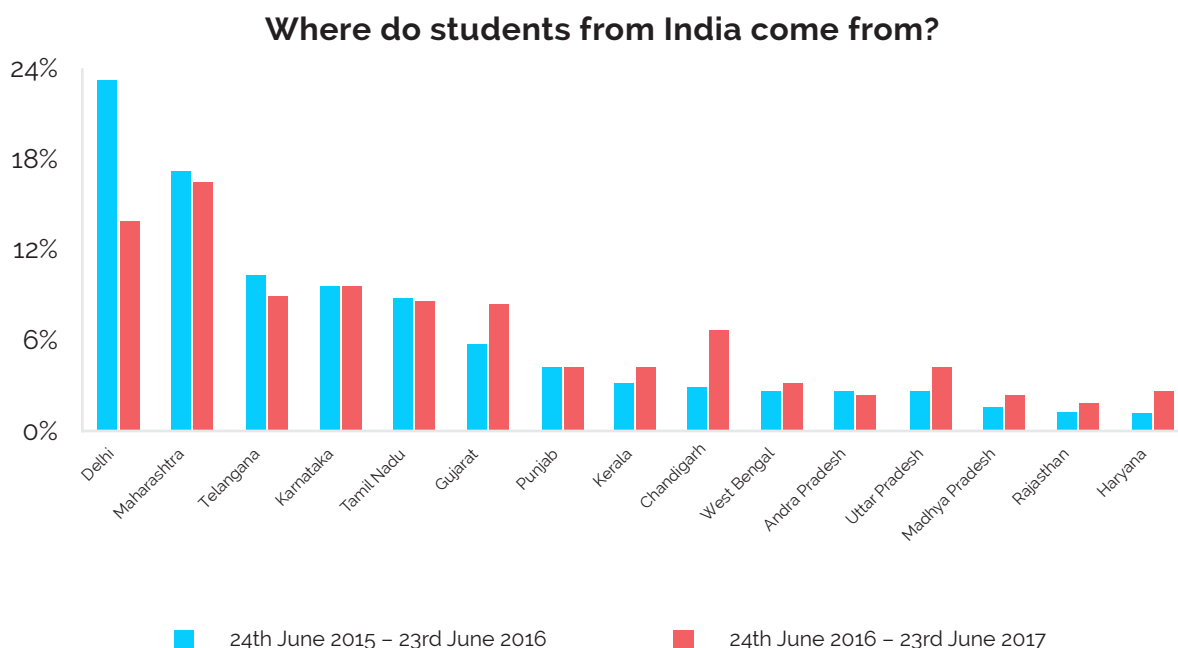
To: 7 leading english language destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
USA	36.4	27
Australia	21.8	20.4
UK	18.0	15
New Zealand	11.9	9.9
Canada	7.7	22.6
Ireland	2.2	3.1
Netherlands	1.9	1.9

## India



We can see in the table below where the regional shifts in India are occurring. Delhi in particular has seen a big drop in demand between 2015-16 and 2016-17, indeed it accounts for the overwhelming proportion of the falls for India. Other regions are showing a lot more resilience in their interest, and indeed some regions have increased their share year on year.



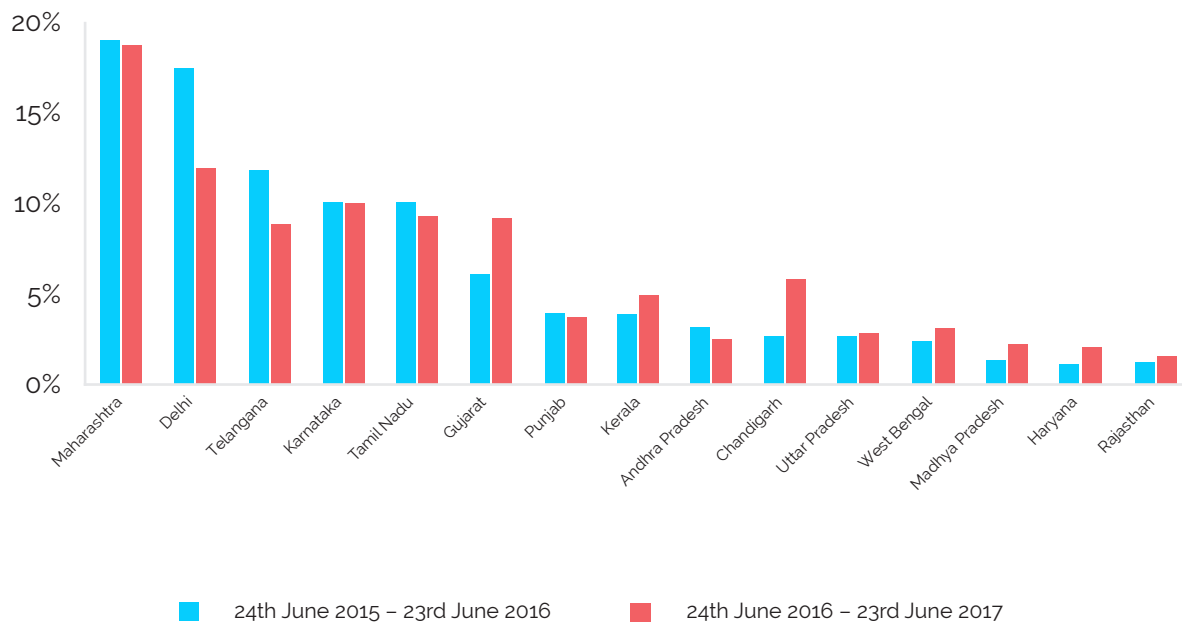
## From India (PG Only)

To: 7 leading english language destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
USA	36.8	25.8
Australia	21.2	21.2
UK	16.8	14.2
Canada	11.7	27.5
New Zealand	9.3	7
Ireland	2.6	2.7
Netherlands	1.6	1.5

Interestingly at postgraduate only, the biggest area where students are researching is the Maharashtra region where demand is proving resilient. Delhi, like for all levels of study sees a reasonable fall.

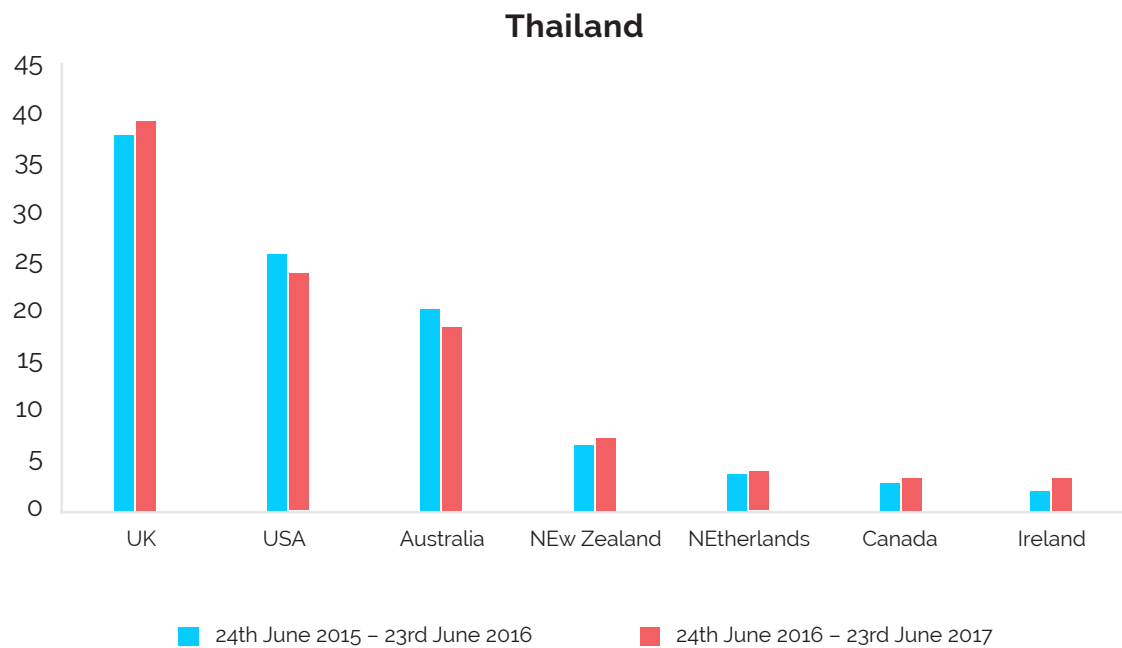
### Where do students from India (PG) come from?



# From Thailand

To: 7 Leading english language destinations

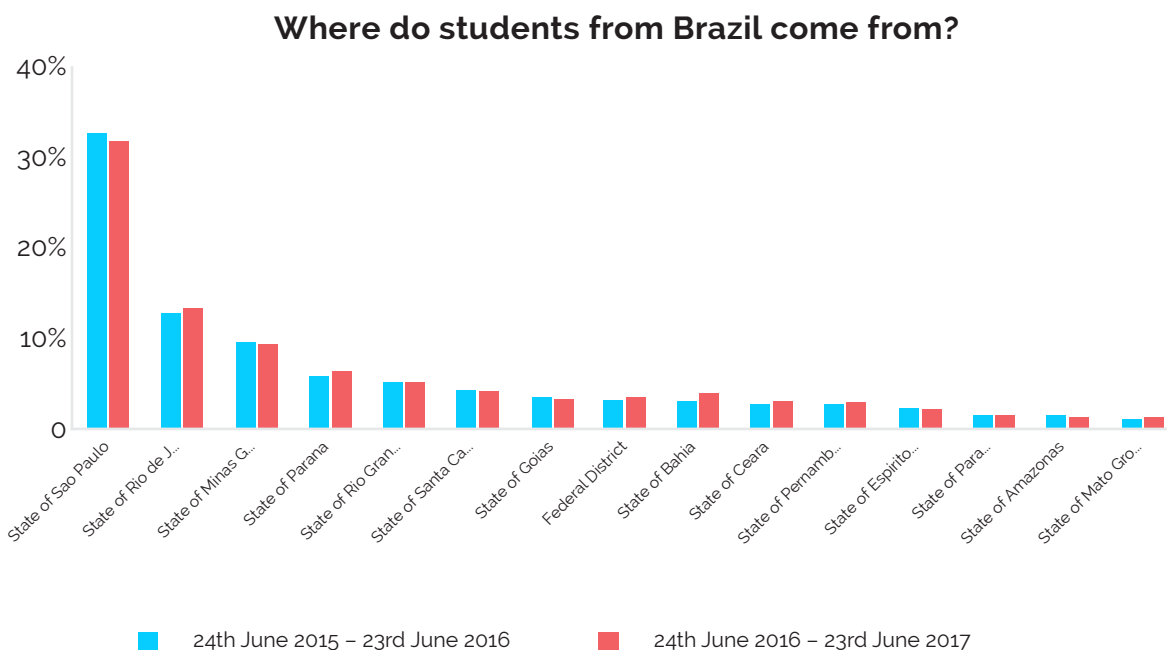
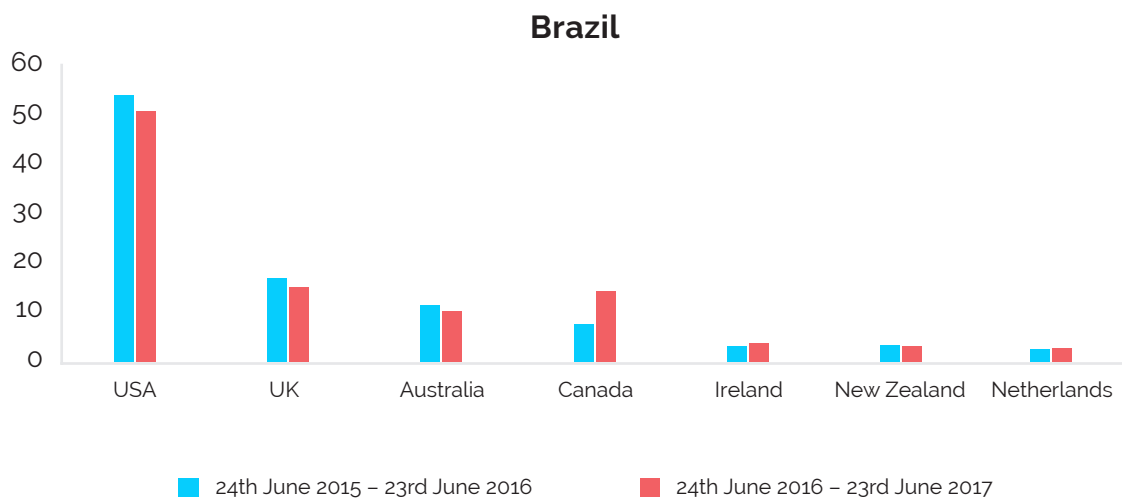
	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
UK	37.8	39.4
USA	25.9	23.9
Australia	20.4	18.7
New Zealand	6.8	7.3
Netherlands	3.9	4.0
Canada	2.9	3.5
Ireland	2.4	3.2



# Brazil

## 7 Leading english language destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
UK	17	15
USA	53.1	50.1
Australia	11.9	10.3
Netherlands	2.8	3
Ireland	3.6	4
Canada	8	14.2
New Zealand	3.6	3.5



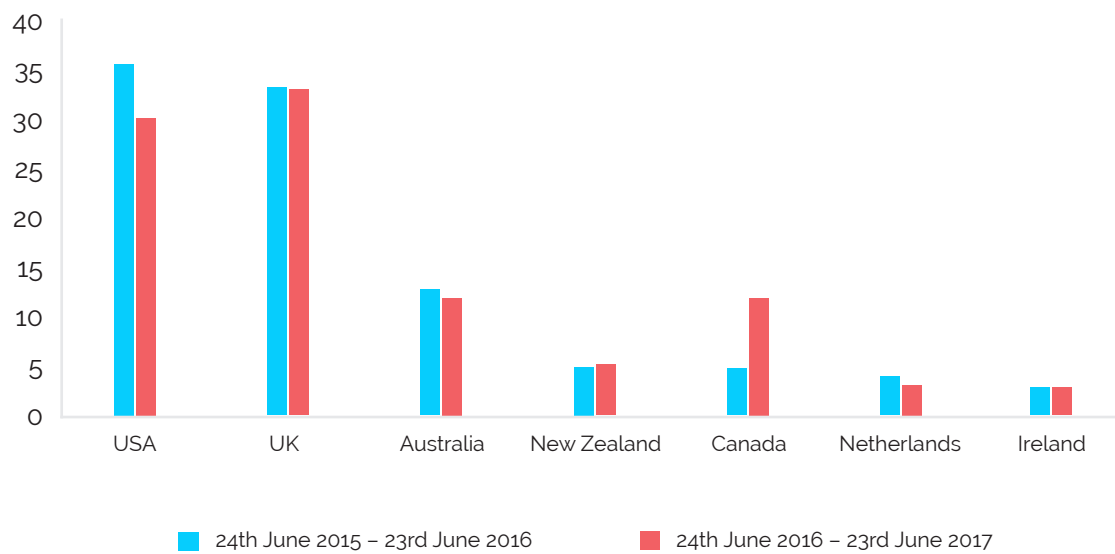


# Middle East

## 7 Leading destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
USA	35.9	30.4
UK	33.5	33.4
Australia	13.0	12.1
New Zealand	5.2	5.4
Canada	5.1	12.1
Netherlands	4.2	3.4
Ireland	3.1	3.1

### Middle East



# Mexico

## 7 Leading destinations

	24th June 2015 – 23rd June 2016	24th June 2016 – 23rd June 2017
USA	59.6	53
UK	18.7	15.7
Australia	9.9	8.9
Canada	5.5	13.6
Ireland	2.5	2.4
New Zealand	2.0	2.7
Netherlands	1.9	3.7

