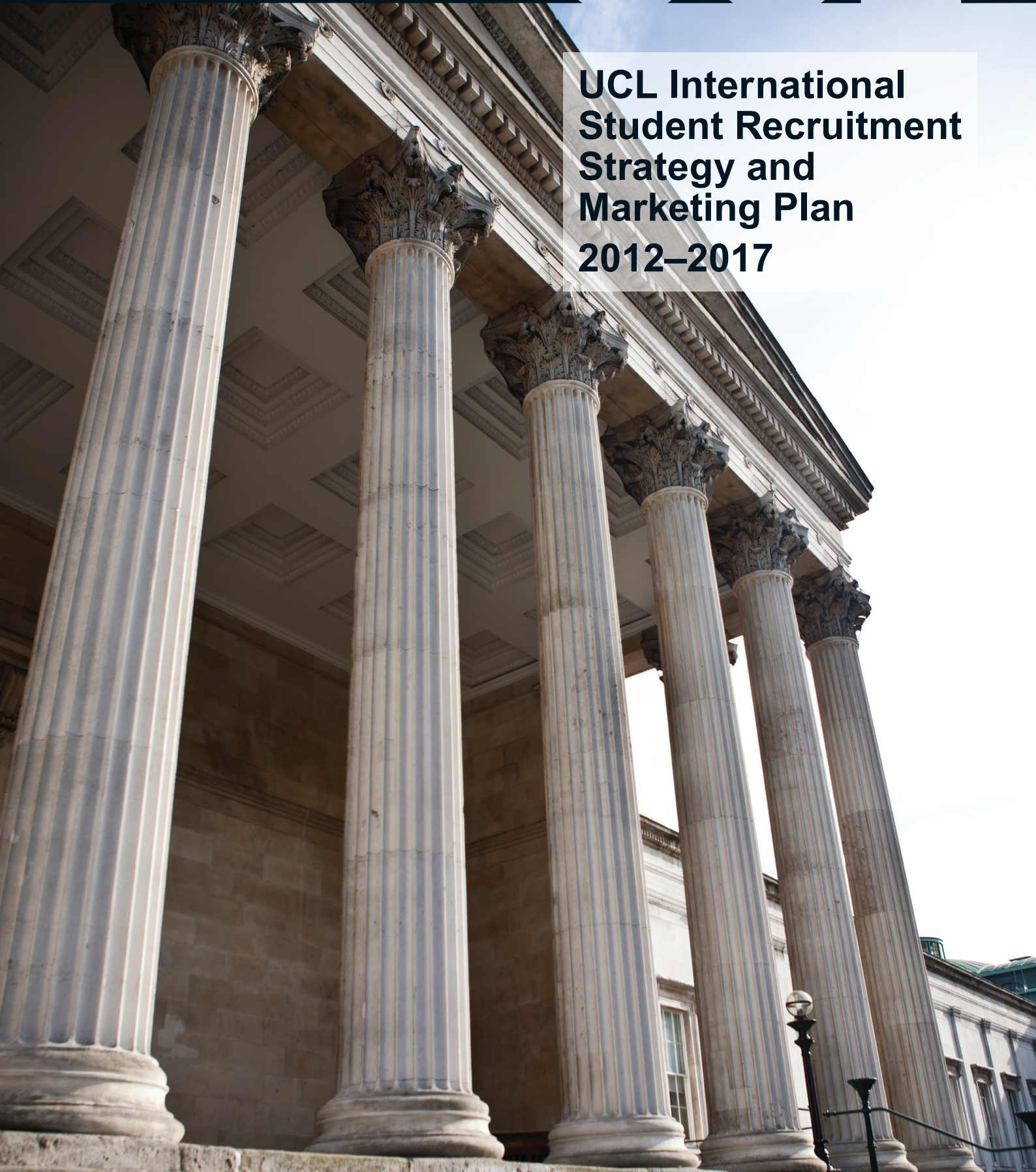


LONDON'S GLOBAL UNIVERSITY



# UCL

## **UCL International Student Recruitment Strategy and Marketing Plan 2012–2017**



# Glossary

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AC	Academic Committee
BC	British Council
BUILA	British Universities International Liaison Association
CRM	Customer Relationship Management
DARO	Development and Alumni Relations Office
FCO	Foreign and Commonwealth Office
HESA	The Higher Education Statistics Agency
IO	International Office
ISH	International Students House
HOST	A UK charity which organises homestays for international students
JSSC	Joint Student Staff Committee
NAFSA	Association of International Educators
OfIA	The Office for International Affairs
PGR	Postgraduate research
PGT	Postgraduate taught
RAE	Research Assessment Exercise
REF	Research Excellence Framework
ROASG	Recruitment, Outreach and Admissions Steering Group
ROI	Return on investment
TNE	Trans-national education
UG	Undergraduate
UKBA	UK Border Agency
UKCISA	UK Council for International Student Affairs
UUK	Universities UK

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# Executive summary

This International Student Recruitment Strategy and Marketing Plan provides an analysis of the international student recruitment environment in which UCL operates. The strategies outlined are designed to exploit UCL's strengths and the opportunities presented in specific markets and for specific subjects and, wherever possible, to mitigate UCL's weaknesses and the external threats to its position.

The Plan is for the next five years to 2017. It concentrates primarily on graduate and undergraduate full-fee international students but also covers EU markets.

Looking at the global and UK context, education is not just an international activity but an international priority. Governments in developed and developing countries alike place education high on the political agenda.

While there is overall growth in the number of students seeking an overseas education, the UK's share of the market for international students is dropping. Consequently competition for the recruitment of international students will become fiercer between UK institutions and with international competitors.

A proven and reliable income stream, UCL's international student fee income is worth £110 million per annum and accounts for more than 10% of UCL's annual turnover. Institution-wide and faculty level financial forecasts are based in part on maintaining and growing international student fee income.

During the five-year period covered by the previous Strategy and Marketing Plan, UCL became even more successful at recruiting international students. Growth correlates closely with markets in which additional investment was made. Comparative data show that UCL has risen from the twelfth to the third highest recruiter of non-EU international students. Tuition fee income from these students doubled.

This Plan presents a departure from the previous Strategy. While maintaining work which focuses on developing those overseas markets where research indicates the potential for growth, there will be an increased focus on delivering students in selected segments (e.g. graduate research) and in specific subject areas. In respect of the latter a new line of work will be developed which will support faculties and departments in the development of programmes which are attractive to international students and markets will be identified and targeted to deliver students in specific subject areas. Whilst not neglecting undergraduate students it is anticipated that graduates will be increasingly prioritised.

There will be an increased focus on collaborative activity with faculties: to inform the development of recruitment targets in the three year rolling plans; to develop collaborative activity; and to deliver on recruitment targets. Electronic marketing activity will be developed with the specific aim of assisting faculties and departments to market to niche audiences in specific subject areas.





### **The objectives for UCL in respect of international student recruitment are to:**

- Increase the academic quality of international applicants to UCL;
- Increase the number of international students enrolled at UCL in line with faculty objectives and three year rolling plans;
- Enhance UCL's global positioning; and
- Ensure that international students at UCL enjoy an excellent experience.

### **The strategies of this Plan to achieve these objectives are:**

- Appropriate research to ensure a sophisticated understanding of overseas countries as markets for the recruitment of international students, and of national and global trends for specific subject areas;
- Appropriate and effective promotional activities undertaken for the purpose of recruiting international students to UCL;
- Effective collaboration between different sections within UCL to achieve recruitment targets; and
- Effective collaboration between different sections within UCL to provide excellent support of international students from the arrival process through to graduation to ensure an outstanding student experience.

### **Implementation of the strategies will be driven by four principles:**

- Recruitment should be from as broad a range of countries as possible, to spread risk and to achieve a heterogeneous student population;
- There is a recognition that the marginal costs involved in recruiting students from small and / or developing markets will be greater than from large or mature markets;
- Effective activities can only be developed with the benefit of a deep and sophisticated knowledge of a given market; and
- Activities should be tailored to each market.

Regular and reflective monitoring of activity, and the evaluation of outcomes and achievements, will be essential if UCL is to ensure that resources are being deployed effectively to achieve the agreed objectives and targets. Formal monitoring, with reference to institutional recruitment targets developed in three year rolling plans will take place annually. The International Office will provide an annual report on the return on investment for each market where recruitment activity is undertaken. The International Office Student Recruitment Activity Report will be submitted to the Provost's SMT, to International Strategy Board, to AC, and to ROASG. The International Office will also provide regular activity and progress updates to the Provost's SMT.

In a time of financial constraint it is increasingly important for UCL to both reduce costs and to generate additional income. In respect of the latter, investment in activity which generates income is a priority since investment in other areas is contingent upon increased revenue. To support the delivery of this Strategy and Marketing Plan – an expansion of markets and development of new lines of work focused on subject areas – and the achievement of UCL's recruitment targets, additional investment in three marketing posts and one support post in the International Office is proposed.

The investment required would be covered by the tuition fee income of just 15 additional international student enrolments per annum. Significantly more can be expected.

# 1. Introduction

## 1.1 Scope and purpose of the Strategy and Marketing Plan

**1.1.1** This International Student Recruitment Strategy and Marketing Plan provides an analysis of the international student recruitment environment in which UCL operates. The strategies outlined are designed to exploit UCL's strengths and the opportunities presented in specific markets and for specific subjects and, wherever possible, to mitigate UCL's weaknesses and the external threats to its position.

**1.1.2** The Plan is for the next five years to 2017. Mindful of changing national and global conditions, it builds on UCL's successful international student recruitment record and provides the direction required for meeting recruitment objectives in the future.

**1.1.3** Student recruitment activity does not take place in a vacuum; it is part of an holistic process that is UCL-wide. Achieving recruitment objectives requires a consistent and joined-up approach across the institution. The Plan considers the role of different parts of UCL in respect of the recruitment of international students. The strategies to be deployed are designed to achieve the most effective use of resource across the institution.

**1.1.4** While this Strategy and Marketing Plan concentrates primarily on full-fee international students it also covers EU markets. There are several reasons for this, *inter alia*:

- Well-qualified nationals of EU countries are often interested in subjects currently less favoured by their UK counterparts;
- Universities and international schools in EU countries are often a source of full-fee international students; and
- The knock-on effects of recent changes to the UK HE funding system have the potential to alter significantly the dynamics of the UK graduate student recruitment market. This is particularly so for taught graduate programmes for which little funding is available. Master's students from the EU could become increasingly important.

**1.1.5** This Plan is written with a broad audience in mind and is intended to be accessible. The use of marketing terminology and jargon without explanation has been avoided.

## 1.2 Global and UK context

**1.2.1** Much has been written about the benefits accruing from international student mobility. The students benefit from a type and quality of education which may not be available in their home country; international students and home students alike benefit from mutual interaction and the better understanding of each other's cultures and values; the host institution benefits from having an academically and culturally rich student body and from the revenue stream; the UK economy benefits from the students' spend; and the UK can normally expect long-term economic and diplomatic benefits from alumni well disposed to this country.

**1.2.2** Education is not just an international activity but an international priority. Governments in developed and developing countries alike place education high on the political agenda; for its intrinsic value in improving the quality of life and because of its central role in equipping a workforce for a knowledge-based economy and the consequent wealth creation.

**1.2.3** It is, therefore, not surprising that education has become a valuable commodity. The provision of educational services and related activity has become one of the UK's key service industry export earners with revenues estimated at some £14 billion per annum (2008/09)<sup>1</sup>. The same research estimated that the value of the education-related export market might reach £21.5 billion in 2020 and £26.6 billion in 2025. A study of the benefits specific to London estimates the overall quantifiable impact from international students at HEFCE funded institutions in London to be £5.7 billion and 94,000 jobs.<sup>2</sup>

**1.2.4** While the demand for international education worldwide is predicted to grow at a pace which will outstrip provision, the nature of delivery has changed. More international students are now following UK education programmes abroad than in the UK – via offshore campuses, distance learning, franchising etc. The number of students accessing UK qualifications via TNE reached 503,795 in 2010/11 – up 23% from 408,685 in 2009/10.<sup>3</sup>

**1.2.5** The UK's share of the international student market declined from 11% in 2001 to 10% in 2010. Competition for the recruitment of international students has become fiercer between UK institutions and with international competitors and the nature of international competition has changed. In addition to competition from traditional rivals like the US and Australia, Canada has started to take increasing market share (accounting for 5% in 2010) driven in part by its attractive immigration policies. Furthermore, competition has grown from non majority English speaking countries. China now has a 7% market share of all international students, south east Asian countries like Malaysia have become net importers of students and many countries in, for example, the Middle East have established themselves as education hubs.<sup>4</sup>

**1.2.6** Recent changes to the UK's immigration policy, in particular the withdrawal of the post study work visa for international students, has made the UK a less attractive study destination for students from some countries, for example India, where the option of working for a year or two after graduation is an important consideration.

<sup>1</sup> BIS Research Paper Number 46: Estimating the Value to the UK of Education Exports, June 2011

<sup>2</sup> PA Consulting: The Economic Impact of International Students to London's Economy: A Quantitative Perspective, May 2011

<sup>3</sup> Higher Education Statistics Agency

<sup>4</sup> Institute of International Education: Atlas of Student Mobility

## 1.3 UCL Context

**1.3.1** In addition to the significant educational, cultural and other benefits that a heterogeneous student body brings to UCL in areas like Global Citizenship and the internationalisation of the curriculum, the fee income from international students makes a significant contribution to UCL's financial stability. A proven and reliable income stream, it is worth £110 million per annum and accounts for more than 10% of UCL's annual turnover. Institution-wide and faculty level financial forecasts are based in part on maintaining and growing international student fee income. Furthermore, a failure to recruit the required number of students and students of the appropriate quality and diversity features in UCL's top risk schedule.

**1.3.2** The Council's White Paper and UCL's Research Strategy both acknowledge the need for buoyant international student recruitment but recognise that there are challenges. Furthermore, the draft International Strategy articulates the need to diversify further UCL's international student recruitment markets.

**1.3.3** During the five-year period covered by the previous Strategy and Marketing Plan, UCL became even more successful at recruiting international students with non-EU international student enrolments rising 58% from 4,214 in 2007 to 6,632 in 2011. This growth outstripped national trends (UK HE sector 32%, Russell Group 34%). UCL's UK market share increased by 20% and its Russell Group market share increased by 18%. Furthermore, comparative data<sup>5</sup> show that UCL has risen from the twelfth to the third highest recruiter of non-EU international students. This is despite UCL not offering business and administration studies programmes which account for more than one quarter of all international student enrolments in UK universities. Tuition fee income from international students to UCL doubled during the period of the last Strategy and Marketing Plan.

**1.3.4** Were this growth predominantly attributable to reputational factors or league table standing, one might expect UCL to be uniformly successful across all levels of study. However, this is not the case. UCL outperforms UK competitors in the proportion of full-fee undergraduates it recruits yet, and notwithstanding the advances that have been achieved in the last few years, underperforms relative to competitors in the recruitment of both taught and research full fee graduate students. UCL's profile among prospective overseas PG (and particularly PGR) students is lower than for prospective overseas UG students.<sup>6</sup>

**1.3.5** The growth in enrolments at UCL over the past five years correlates closely with those markets in which UCL invested additional resource in line with the previous Plan. Significant growth has come from markets in which graduate recruitment activity was introduced, e.g. China, Canada and the USA; mature markets in which additional activity was introduced, e.g. Singapore, Hong Kong and Malaysia; and in

markets where UCL has sought to diversify, e.g. Turkey, Nigeria and in Latin America where UCL has become the top UK recruiter of students from Chile.<sup>7</sup>

**1.3.6** Despite this success, and notwithstanding the development of the UCL Masterplan and potential expansion in east London, in the short term restrictions imposed by UCL's Bloomsbury estate mean that the growth in international student numbers at UCL can not continue unfettered. UCL's international student recruitment objectives for the next five-year period will need to be less focused on overall growth *per se* and more informed by targets for growth in specific priority areas. These priorities might be by level of study e.g. research students, by subject area, or informed by the need to further diversify UCL's recruitment markets.

**1.3.7** Although the growth from many smaller markets e.g. Canada, Saudi Arabia, Turkey and Qatar has seen recruitment double, and in some instances quadruple, during the past five years, the absolute growth from a few core markets has outstripped this. 50% of UCL's full-fee international students now come from just four markets<sup>8</sup> and over two thirds from just ten.<sup>9</sup> Further diversification of recruitment markets will spread risk, achieve as heterogeneous a student population as possible and avoid ghettoization.

**1.3.8** The recruitment strategies that UCL adopts will need to be flexible enough to respond to changing objectives at faculty level articulated in the development of rolling three year plans. These strategies need increasingly to be led by subject area considerations.

<sup>5</sup> Higher Education Statistics Agency

<sup>6</sup> i-graduate Student Pulse

<sup>7</sup> Higher Education Statistics Agency

<sup>8</sup> China, the USA, Singapore and Hong Kong

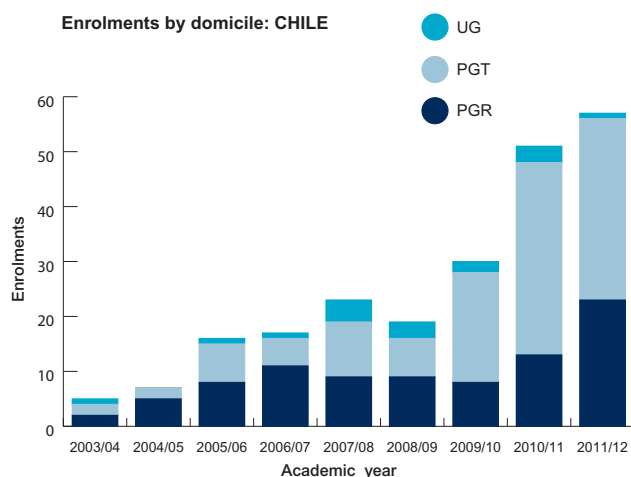
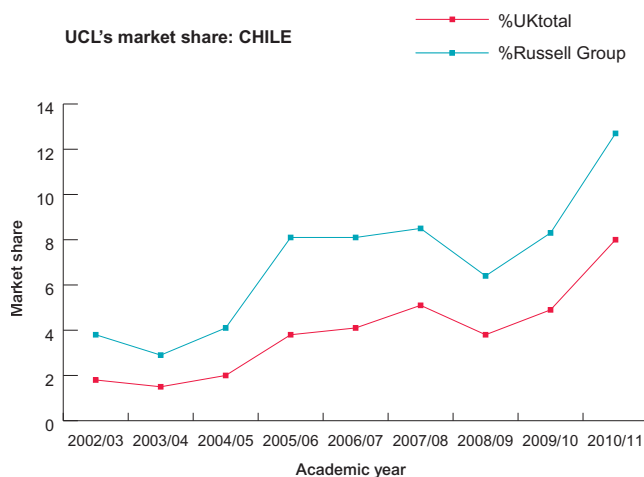
<sup>9</sup> Those above plus: Malaysia, Republic of (South) Korea, India, Canada, Thailand and Japan



## CASE STUDY – CHILE

- Prior to 2008 UCL had visited Chile but activity was sporadic and not determined by a carefully researched strategy.
- In 2006/07 and 2007/08 the International Office sent a representative to attend the QS World Grad School tour fairs in Santiago.
- 2008: The International Office appoints an International Officer with responsibility for Latin American markets and starts to visit the British Council in Chile on a regular basis.
- 2009: An Analysis and Marketing Plan for Chile is produced which includes recruitment targets. The first IO counselling sessions for Chilean offer holders take place in-country. The IO has meetings with representatives of the Chilean government funding body Becas Chile in-country; an excellent working relationship is developed. The International Office increases the number of visits to Chile to two per year in order to attend the Europosgrados fair in the spring and the World Grad School Tour event in the autumn.
- 2010: UCL is one of only a few institutions not to cancel its visit to Chile just weeks after a series of earthquakes devastate the country. Counselling sessions are held with a large number of students. UCL becomes number one UK destination for Chilean students (HESA).
- 2011: Meetings are held with CONICYT (who by now have fully taken over the administration of the Becas Chile programme). CONICYT reports that UCL is the number one destination in the UK for their scholars.
- In 2012 UCL recruitment activity in Chile will include the provinces for the first time: a representative will visit Antofagasta and Valdivia as well as Santiago.

Tuition fee income to UCL from Chilean students is an estimated £1 million per annum (up from c.£350,000 per annum in 2007/8).



## 1.4 The International Office

**1.4.1** Over the 25 years of its existence the International Office has contributed significantly to the major growth in the number of international students enrolled at UCL. In particular the strategies developed and implemented by the IO in the last five-year Plan has seen the rate of growth in international student enrolments at UCL increase and outstrip that of competitors by a considerable margin.

**1.4.2** The work of the International Office has been directed at researching overseas markets; developing a portfolio of recruitment activities and promotional tools; creating and refining web-based information; building a network of international contacts; establishing partnerships with overseas institutions, funding bodies and ministries; and working with faculties and departments to ensure they are kept up-to-date with developments in overseas markets and to identify specific opportunities. The IO is a professional centre for information on major and minor international markets with expertise in the promotion of UCL via a variety of channels.

**1.4.3** The International Office must be dynamic and pro-active in an environment where competitor activity continues to grow and become more diverse. The IO is committed to promoting UCL to international students, to maintaining UCL's position as a premier destination of choice, and to increasing the number and diversity of these students. This Plan sets out the strategies which will direct UCL in general, and the IO in particular, to achieving its recruitment objectives. The strategies build on existing successful activities and principles and introduce new activities and techniques to take account of changing market realities and new institutional objectives.



## 2. SWOT analysis

### Strengths

- Strong reputation / academic standing
- Strong position in national / international league tables
- Good ratings in RAE / teaching assessments
- Good student : staff ratio
- Improving brand recognition among the academic community globally and across a broader range of groups in mature markets
- Location (London is generally an advantage)
- Not reliant on agent-led recruitment
- Knowledge of a wide range of markets
- Recruitment of students from a broad spread of countries
- High propensity of former students to actively recommend UCL as highlighted by the International Student Barometer surveys.

### Weaknesses

- Low brand recognition / visibility in new and developing markets
- High proportion of international students recruited from just a few markets
- High cost of programmes / lack of scholarship provision
- Concentration of significant components of recruitment in some academic disciplines
- Absence of disciplines popular with international students, e.g. business
- The most significant segment of the affiliate market not catered for due to the absence of a summer school
- Proportionately modest investment in international marketing compared to many competitors
- Limited use of new technologies in international student recruitment
- Deficiencies in the student experience (academic, administrative and social) as highlighted by the International Student Barometer surveys.

### Opportunities

- Continuing growth in demand for international education
- Continuing weakness of sterling
- Potential for growth from, as yet, undeveloped and underdeveloped markets
- Increased focus on international league tables by e.g. overseas funding agencies
- Opportunities presented by new internet technologies to develop marketing

- Opportunities to improve global positioning and graduate recruitment through overseas campuses and through strategic alliances and collaborations.

### Threats

- Global or regional economic or political changes
- Local or international terrorist activity leading to a decline in London's attractiveness or a fall in international travel
- Increased investment in recruitment activity by national and international competitors
- New country competitors entering the market
- The UK becomes a less attractive study destination due to immigration changes – especially the removal of the automatic Post Study Work entitlement
- Other universities improve their standing in national or international league tables at UCL's expense
- Other universities improve their research standing in the REF at UCL's expense
- New visa regulations mean that if UCL fails to comply with all UKBA requirements it could forfeit its Highly Trusted Sponsor status and, therefore, its ability to recruit non-EU students.

From this analysis strategies can be developed using a SWOT Matrix.

	Strengths	Weaknesses
Opportunities	S–O Strategies	W–O Strategies
Threats	S–T Strategies	W–T Strategies

Factors internal to UCL can be classified as strengths (S) or weaknesses (W). Those external to UCL can be classified as opportunities (O) or threats (T).

**S–O Strategies:** Pursue opportunities that fit UCL's strengths

**W–O Strategies:** Overcome weaknesses to pursue opportunities

**S–T Strategies:** Identify ways in which strengths can be used to overcome vulnerability to external threats

**W–T Strategies:** Establish defensive plans to prevent UCL's weaknesses from making it susceptible to external threats.

Clearly not all of these factors or actions are within the International Office's remit. This Plan focuses primarily on International Office-led strategies to improve UCL's market position.

Mindful of this analysis, strategies have been developed to exploit UCL's strengths and the opportunities presented and, wherever possible, to mitigate weaknesses and threats.



## 3. Strategies for meeting recruitment targets

**3.1.1** In the absence of a global or key regional economic or political crisis, the number of international students coming to UCL can continue to increase in line with corporate and faculty objectives so long as properly researched, focused and resourced strategies are in place.

**3.1.2** International student recruitment strategies employed by most UK universities rely, to a greater or lesser degree, on agent-led recruitment. It is worth restating that this approach remains inappropriate for UCL, except in limited circumstances, for a number of reasons:

- It would result in a reduction in fee income per student since overheads associated with agent-led recruitment are much greater. In addition to commission paid to agents, as many, if not more, overseas visits are required to manage agents and to undertake follow-up activity;
- The liaison expected by agents over the progress of individual applications is labour-intensive and would require a significant investment in additional staff;
- There is a risk of reputational damage since UCL would not have direct control over, or be able to police, methods employed by its 'official' representatives;
- There is a chance that inappropriate agent activity might result in UCL falling foul of the Bribery Act 2010; and
- Opportunities arising from direct contact with prospective students are lost.

Notwithstanding this and reflecting the nature of its programmes, there will continue to be a role for the use of a small number of agents as part of the UCL Language Centre's marketing and recruitment strategy.

**3.1.3** This Plan elaborates the strategies believed to be appropriate for UCL. They are founded upon a recognition that successful marketing relies on:

- A deep and sophisticated understanding of world markets and the differences between them;
- Knowledge of the needs of the students and their sponsors;
- A clear understanding of what UCL can offer or might offer;
- Deployment of appropriate and effective promotional activities;
- Acknowledgment that effective and successful recruitment is an holistic process dependent upon institution-wide collaboration;
- A policy of sustained investment in marketing activities;

- The need to take a long-term view of the benefits to UCL of engaging with specific markets;
- The development of key relationships both within UCL and overseas;
- A willingness to be flexible in response to market conditions;
- Excellent CRM strategies designed to maximise conversion rates; and
- An outstanding student experience at UCL.

**3.1.4** The objectives for UCL in respect of international student recruitment are to:

- Increase the academic quality of international applicants to UCL;
- Increase the number of international students enrolled at UCL in line with faculty objectives and three year rolling plans;
- Enhance UCL's global positioning; and
- Ensure that international students at UCL enjoy an excellent experience.

**3.1.5** The strategies to achieve these objectives are:

- Appropriate research to ensure a sophisticated understanding of overseas countries as markets for the recruitment of international students, and of national and global trends for specific subject areas;
- Appropriate and effective promotional activities undertaken for the purpose of recruiting international students to UCL;
- Effective collaboration between different sections within UCL to achieve recruitment targets;
- Effective collaboration between different sections within UCL to provide excellent support of international students from the arrival process through to graduation to ensure an outstanding student experience.

**3.1.6** In line with its remit, the International Office will play a leading role in work aimed at realising these strategies. However, some activities will be delivered by or in collaboration with other agencies within UCL.

**3.2 Strategy: Appropriate research to ensure a sophisticated understanding of overseas countries as markets for the recruitment of international students, and of national and global trends for specific subject areas**

Effective marketing plans for individual countries must be based on relevant and reliable research and data. To this end, the following work will be undertaken:

**3.2.1 Tracking of global trends in international student mobility.**

**3.2.2** Using the capabilities of SITS, analysis of management information in order to focus resources in the most effective way. This management information will include:

- Statistical analysis of recent recruitment trends;
- Trends of applications and enrolments of international students at UCL (by country, academic department and degree programme);
- Ratio of applications to offers, offers to acceptances, and acceptances to enrolments by country and cut by level of study;
- Sources of financial support for current international students;
- Recruitment patterns from key individual schools, colleges and universities<sup>10</sup> which send students.

**3.2.3** Using HESA data to benchmark UCL's performance against UK national trends and against the Russell Group to identify changes in UCL's market share, subject specific trends and to highlight areas for improvement.

**3.2.4** The introduction of a new strand of systematic research based around individual subjects:

- Identification of UK trends in recruitment by subject and how UCL trends map onto that;
- Identification of which markets supply the most students by specific subject to the UK and to the Russell Group and to any other particular institution competitors to identify markets where recruitment could be improved;
- Mapping UCL markets by subject onto UK, Russell Group and specific competitor trends;
- Using the data to identify the most promising markets for individual subjects – to inform departmental targets to ensure they are realistic and geared towards meeting faculty recruitment targets articulated in three year rolling plans;
- Using bespoke HESA reports to identify specific programmes at competitor universities which are popular with international students and, using these data, assist departments and faculties in programme development.

**3.2.5** Further expansion of country-specific research to demonstrate:

- Demand by level of study, subject area and type of market;
- Economic, political and social factors, which may impact on the market;
- Gaps in local educational provision;
- Social expectations in respect of education;
- Technological and professional training needs;
- Risks inherent in each market;
- Competitor activity.

**3.2.6** Using the data gathered in International Student Barometer surveys to identify the factors that are important to students from various countries and what factors are important to students studying specific subjects to inform marketing strategies and messaging.

**3.2.7** Researching the policies of bodies which provide student financial support.

**3.2.8** Monitoring the effectiveness of UCL's international student pages via google analytics and monitoring the effectiveness of ezine communications via appropriate software analysis tools.

**3.2.9** Active involvement with, and monitoring reports by and communications from, national and international organisations with an interest in international students e.g. the British Council, UKCISA, NAFSA, BUILA, UUK etc.

**3.2.10** Research to inform the development of a broader UCL graduate research student recruitment strategy for the UK and internationally.

**3.2.11** Commissioning external research where appropriate.

**3.2.12** This research-focused strategy will help to determine activity, regularly reviewing countries for their market potential and allocating resources to the activities deemed most effective. A monitoring process will feed back into further research and refinement of activities.

<sup>10</sup> The issue of a reliable report on the former institutions of graduate students is being addressed through the Admissions Project.

### 3.3 Strategy: Appropriate and effective promotional activities undertaken for the purpose of recruiting international students to UCL

The target group of prospective students in each country will be smaller for UCL than for most UK universities. This is a function of UCL's higher fees and entry requirements. Promotional activities should therefore, wherever possible, be focused and specific rather than broad and generic. To this end, the following work will be undertaken:

#### 3.3.1 Representation and promotion of UCL in priority countries through:

- Participation in selected education exhibitions, including those organised by the British Council or private companies (e.g. the World Grad School Tour) as appropriate to market conditions;
- Organising independent visits to schools, universities and agencies likely to encourage applications of suitably qualified students to UCL, as identified by research;
- Taking part in study abroad fairs at US institutions and visiting Asian universities to support affiliate recruitment;
- Organising independent education exhibitions and independent visits in collaboration with Imperial, King's and the LSE under the World Class Study in London banner;
- Public presentations; and
- Individual counselling sessions with applicants and offer holders.

**3.3.2** Collaboration with the Outreach Office to promote UCL to high-fee international students in the UK through organising independent visits to (or World Class Study in London events at) appropriate schools.

**3.3.3** Collaboration with the Graduate Marketing Manager to promote UCL to high-fee international students studying at other UK universities by organising World Class Study in London events in other UK cities.

**3.3.4** As evidenced by International Student Barometer surveys and recognising that the International Students' section of the UCL website is one of the primary resources for international students, ensure that:

- Structure, style and content are up-to-date and effective;
- Country pages are improved and maintained;
- Information is easy to find;
- Search engine placement is appropriate;
- Appropriate links are maintained both to and from the sites of other departments and sections within UCL; and
- Appropriate links are maintained both to and from the sites of other relevant institutions and agencies.

**3.3.5** Effective use of printed and electronic promotional materials through:

- Organisation of mailings overseas to schools, universities, British Council offices, funding agencies, government offices etc., supported by up-to-date and accurate mailing databases;
- Contributing relevant information to published material produced elsewhere such as the UCL Prospectuses; and
- Production of dedicated and targeted material such as the *UCL Study Abroad Guide*.

**3.3.6** Development and nurture of links with funding bodies and, where appropriate, negotiating agreements to facilitate the recruitment of sponsored students.

**3.3.7** In respect of overseas affiliate students:

- Promoting and increasing the number of institutional links designed to facilitate, for example, an increasing flow of affiliate students from US and Asian universities; and
- Working closely with these link institutions so that they recommend UCL to their students as a destination for study abroad.

**3.3.8** Work with UCL study abroad students so that they might contribute to promotional activities while on placement.

**3.3.9** Working with staff at UCL's overseas campuses to achieve cross promotion of UCL programmes offered in London and overseas.

**3.3.10** Building on existing pilot projects and harnessing new technologies, introduce a new strand of electronic marketing to prospective international students including those in markets that are not visited:

- Online presentations and counselling sessions via bespoke software to students in schools overseas;
- Online exhibitions;
- One to one, online counselling for prospective students and applicants;
- Ezines to overseas enquirers;
- Ezines to offer holders and the introduction of chat events;
- An expansion of the IO's use of social networking media (e.g. Facebook and Twitter) and also social networking platforms popular overseas (e.g. Youku and Orkut); and
- Ezines and the use of other electronic channels to target the advisers of international students including school counsellors, fellowship and graduate advisers in universities, staff in funding bodies and other sponsoring bodies, and (for affiliate recruitment) study abroad advisers in universities.

**3.3.11** Making use of the technologies highlighted above, introduce a new stream of subject specific work providing a service to faculties and departments to facilitate online exhibitions, presentations, information and counselling sessions and conversion events in specific subject areas.



### 3.4 Strategy: Effective collaboration between different sections within UCL to achieve recruitment targets

Student recruitment and recruitment events do not take place in a vacuum; they are part of a broader, holistic process that is UCL-wide. Effective recruitment and meeting targets is best achieved by a consistent and joined-up approach across the institution. For the International Office this means:

**3.4.1** Working with the OfIA to achieve synergies and avoid duplication in international initiatives and to plan collaborative activities. Working to develop an internal UCL ezine covering international issues.

**3.4.2** Working with the Provost's Office, the Vice-Provost (International) and the OfIA, the Vice-Provost (Research) and the Vice-Provost (Education) to ensure that maximum benefit is derived from official visitors, where such visitors may help to influence potential applicants:

- Making maximum use of UCL's central location in terms of visitors from overseas coming through agencies such as the FCO, British Council, London-based embassies and commercial organisations e.g. the Embassy Group;
- Providing briefings for the Provost and Vice-Provosts on recruitment from individual markets as appropriate to support such visits;
- Ensuring that the maximum use of appropriate visits is made for promotional purposes;
- Ensuring that there is appropriate follow-up to any visit.

**3.4.3** Regular liaison with the Pro-Provosts:

- For the International Office to brief them on market trends, student numbers and on-going / planned marketing activities in their countries;
- For the International Office to learn of developments within UCL which may assist with promotion in various markets;
- To help the International Office with insights about the markets in their regions, derived from their high-level contacts;
- To plan mutually supportive activities; and
- To cooperate on specific overseas recruitment activities.

**3.4.4** Liaising with Faculty Deans to:

- Ensure they are kept up-to-date with developments in overseas markets;
- Provide data on international student recruitment patterns for their subject areas at other UK universities;

- Identify specific opportunities for their faculties;
- Identify opportunities for collaborative activities;
- Identify types of additional assistance the International Office can provide.

**3.4.5** Challenging the commonly-held view that departments within UCL can be classified as either 'recruiting' or 'selecting'. All departments, irrespective of the ratio of applicants per place, are in competition with departments and institutions of similar (or higher) status in the UK and beyond to recruit students of the highest possible quality.

**3.4.6** Working with faculties, departments or individual programmes to support the development of subject specific online recruitment and conversion activity.

**3.4.7** Working with faculties to develop collaborative recruitment activity especially where opportunities exist for faculties to develop value-adding, wrap-around activity in parallel with International Office recruitment events.

**3.4.8** Working closely with faculty communications officers where opportunities exist for them to promote specific academic disciplines via International Office activity.

**3.4.9** Supporting individual academics travelling overseas where an opportunity for recruitment activity might exist. The publication *Representing UCL Overseas* is produced by the International Office to support academics in this respect.

**3.4.10** Liaison with Admissions and advising on:

- Changes in national qualification frameworks;
- Changes in the rankings of schools, colleges and universities overseas; and
- The way UCL's competitors view overseas qualifications.

This work will be facilitated through staff, when they are making visits overseas, checking that UCL's current understanding of qualifications is up to date, and reporting back on any developments.

**3.4.11** Liaising with Media Relations to achieve a greater coverage of UCL in overseas media, and especially to provide information about the most relevant subject areas to target in specific markets.

**3.4.12** Build on the fruitful relationship between the International Office and DARO, and especially help the Alumni Recruitment Representatives in countries overseas to perform their role effectively.

**3.4.13** Liaising regularly with the UCL Language Centre to identify new markets for English language programmes, the University Preparatory Certificates and any additional programmes that might be introduced.

**3.4.14** Working through the Scholarships Officers' Planning Group to:

- Ensure that there are strategies in place and promotional materials available to maximise the effectiveness of current UCL scholarships as recruitment tools; and
- Provide market knowledge to inform the deployment of finite scholarship funds to support UCL's priority recruitment objectives.

**3.4.15** Working through ROASG to ensure a joined up and complementary approach across UCL's various student recruitment teams to ensure that the objectives, strategies and activities for one segment do not compromise the objectives, strategies and activities of another.

**3.4.16** UCL policy that all international student recruitment initiatives should be undertaken in consultation / collaboration with the International Office to ensure consistency with institutional objectives and strategies and to ensure resources are targeted to provide maximum return on investment remains unchanged.



## CASE STUDY – BARTLETT / INTERNATIONAL OFFICE COLLABORATIVE ACTIVITY

Since 2006 the Bartlett has developed collaborative overseas recruitment activities with the International Office. Professor CJ Lim was asked by the then Dean, Professor Christine Hawley, to develop Bartlett specific activity which dovetailed with existing International Office activities in key markets.

This has proved to be an efficient, targeted and effective deployment of faculty resource. By developing activities around pre-existing, generic UCL in-country promotion, the Bartlett has built on that investment to maximise its own efforts.

The collaboration has seen joint activity in Japan, South Korea, Malaysia, Singapore, Taiwan and recently the USA. The model involves Professor Lim being available to give information and advice to prospective students and applicants at the generic exhibitions and, critically, to be able to offer portfolio sessions.

Importantly though, additional activities developed around the exhibitions have added real value and developed the Bartlett brand. Professor Lim has given public presentations at professional bodies, e.g. the Japan Architecture Institute, the PAM in Malaysia (the local equivalent of RIBA) and the Urban Redevelopment Authority in Singapore. He has given public presentations at universities – for example Seoul National and Han Yang Universities in South Korea – and has given subject specific presentations at British Council exhibitions.

The International Office has supported Professor Lim in this work by promoting the public presentations on the website and through exhibition advertising, contacting applicants and, where relevant, advertising the events through our contacts in local British Council offices.

The final strand of Professor Lim's activity has involved alumni. Professor Lim has worked closely with DARO to develop beneficial relationships with former Bartlett students – former students who are often in a position to influence others considering applying to UCL.





## 4. Implementing the Strategies

**4.1** There are several driving principles which inform the implementation of the strategies. Briefly:

- Recruitment should be from as broad a range of countries as possible, to spread risk and to achieve a heterogeneous student population;
- There is a recognition that the marginal costs involved in recruiting students from small and / or developing markets will be greater than from large or mature markets;
- Effective activities can only be developed with the benefit of a deep and sophisticated knowledge of a given market; and
- Activities should be tailored to each market.

**4.2** Marketing staff in the International Office have been assigned portfolios of markets. Each market has one member of staff with lead and one with back-up responsibility to ensure both continuity and a spread of specialist knowledge. Marketing plans for individual countries will be updated where they exist and plans will be prepared for new markets. The approach will be informed by the strategies outlined in section 3.

**4.3** Marketing plans for individual countries will include *inter alia*:

- An analysis of the market based on internal UCL and external data. The analysis will include:
  - An understanding of the Political, Economic, Social, Technological, Educational and Competition (PESTEC) macro-environmental factors operating in the market (see table, right)
  - The UCL position benchmarked against the national position and the performance of competitors, for example plots of UCL's market share compared to the UK or e.g. the Russell Group over several years
  - Identification of key subject areas for recruitment
  - Identification of recruitment patterns at the level of individual schools and universities
  - Identification of key funding bodies and other sources of funding
  - Key links, agreements and collaborations that UCL has in the market
  - Key alumni in the market – either high profile or active in supporting UCL;
- A breakdown of individual market segments (e.g. undergraduate, graduate, affiliate and foundation level) and an indication of how each segment will be targeted;
- The development of meaningful and measurable objectives and recruitment targets;
- Methodologies to monitor the effectiveness of activities deployed in each market.

Political	Technological
<ul style="list-style-type: none"> <li>• Stability of government</li> <li>• Investment in education</li> <li>• Political opinion in relation to international engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Rate of technological change</li> <li>• Internet access rates</li> <li>• R&amp;D activity</li> </ul>
Economic	Educational
<ul style="list-style-type: none"> <li>• Economic growth</li> <li>• Per capita income</li> <li>• Interest rates</li> <li>• Exchange rates</li> <li>• Inflation rate</li> <li>• Employment rate (general, graduate)</li> </ul>	<ul style="list-style-type: none"> <li>• Level and equivalence of local qualifications</li> <li>• HE access rates and the demand for overseas education</li> <li>• In country provision (and any gaps)</li> <li>• Availability of sponsorship</li> <li>• Student visa application success rates</li> </ul>
Social	Competition
<ul style="list-style-type: none"> <li>• Population growth rate</li> <li>• Age distribution</li> <li>• Value placed on education</li> <li>• Culture and customs</li> </ul>	<ul style="list-style-type: none"> <li>• Activity by UK or other universities</li> <li>• TNE provision</li> </ul>

**4.4** In line with the development of three year rolling plans, and an increased focus on subject targets, a new line of activity will be developed:

- Staff in the International Office will be allocated portfolios based primarily but not exclusively on UCL faculty subject groupings.
- In addition to the market research that they undertake according to their country portfolios they will also undertake subject led research as highlighted at section 3.2.4.
- The research will feed into their own and into colleagues' country plans.
- The research will support briefings for Deans as at section 3.4.4.
- They will act as an initial contact point for marketing enquiries from faculties and departments according to their subject portfolios.
- They will liaise proactively with faculties and departments over the development of new programmes to meet market opportunities at all levels of study including affiliate.
- They will, in collaboration with the International Officer (E-Marketing), develop electronic marketing activities for subject areas as described in sections 3.3.10 and 3.3.11.

**4.5** Engagement with individual countries will be informed by the needs of individual subject areas and an appreciation of the marketing mix.

**4.5.1** Product. Broadly, but not exclusively, the degree programmes that UCL offers. Product also includes services, e.g. welfare support or

computer access that are part of the provision. The success in promoting different degree programmes will vary from market to market. The International Office will have a role in identifying gaps in UCL's provision and in liaising with faculties and departments about possible new programmes.

**4.5.2 Price.** Not just the headline price of degree programmes and profit margins, but the role of scholarships and discounting arrangements with funding bodies. Some markets will be more price sensitive than others and this needs to be considered when benchmarking UCL against competitors and making decisions about the deployment of recruitment resource. Similarly discounting arrangements (joint scholarships) are more prevalent in certain markets and their provision by UCL will be an important consideration in the marketing mix.

**4.5.3 Place (or placement).** This includes not just the site of delivery (e.g. UK versus TNE) but also channels of distribution. With the opening of overseas campuses and the delivery of UCL programmes in other locations plus the likely development of more distance-learning this issue is likely to become more significant for UCL.

**4.5.4 Promotion.** Broadly speaking, communicating UCL's offer to students, their parents, sponsors and advisers. Different methods of promotion will be deployed as appropriate to individual markets. Individual market plans will take account of the country's status; whether it is a mature, developing or potential market and regular revisions to the plans will take account of any changes in this status. It is likely that electronic marketing techniques will become ever more important.

**4.5.5 People.** UCL students and prospective students – our “customers” – will form judgements about UCL based on interactions with staff through the enquiry, recruitment and admissions process and beyond. It is important that appropriate staff, adequately trained and with the right market knowledge are deployed in different markets.

**4.5.6 Process.** The systems used in delivering the product; be that response to enquiry, making an offer or the experience of UCL once a student has enrolled. In the vast majority of markets the speed of decision making on applications and associated CRM will impact significantly on conversion rates.

**4.5.7 Physical evidence.** The environment in which the product is both promoted and delivered needs to be commensurate with expectations and with UCL's status. Student – or customer – satisfaction levels influence future recruitment patterns.

**4.5.8** The last three Ps (People, Process and Physical evidence) deal broadly with the student experience. The importance of this as part of the marketing mix in achieving targets is looked at in section 3.5. It will be important for UCL to take seriously the findings of student satisfaction research e.g. the International Student Barometer and to have structures in place which ensure an effective and prioritised response to issues of concern.

**4.6** The Head of the International Office and the International Liaison and Recruitment Manager will review, on an annual basis, the relative performance of markets to establish a global perspective, to reclassify markets where appropriate and to determine appropriate resource allocation between markets.

## 5. Monitoring and Evaluation

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**5.1** This is a five-year Plan running through to 2017. Regular and reflective monitoring of activity, and the evaluation of outcomes and achievements, will be essential if UCL is to ensure that resources are being deployed effectively to achieve agreed objectives and targets.

**5.2** Reports on overseas recruitment activity will include updates on progress in relation to country targets and reflection on the effectiveness of different activities in the market.

**5.3** Formal monitoring, with reference to institutional recruitment targets developed in the three year rolling plans will take place annually.

**5.4** The International Office will provide an annual report on the return on investment for each market where recruitment activity is undertaken. This International Office Student Recruitment Activity Report will be submitted to the Provost's SMT, to International Strategy Board, to AC, and to ROASG.

**5.5** The International Office will also provide regular activity and progress updates to the Provost's SMT.

**5.6** The monitoring process will feed back into the International Office's research to further refine recruitment strategies for each market.



## 6. Resourcing and Financial Considerations

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**6.1** UCL has c.25,000 students of which 6,632 are non-EU international students. The International Office has a staff of nine involved directly in or supporting international marketing, liaison and recruitment. The International Office non-staff budget for 2011/12 is £349,345. The budget and staffing levels are modest compared with some competitors. For example, Nottingham has c.32,000 students of which some 8,300 are international students. Its international office has 40 full- and part-time staff. Warwick has c.23,000 students of which some 6,500 are international students. There are 33 staff in the Warwick international office.

**6.2** Given the level of investment, UCL has enjoyed remarkable success in attracting high fee international students. The investment in three additional members of staff made five years ago to resource new activities set out in the previous Plan allowed UCL to expand into several new markets and to increase activity in existing ones. As reported in section 1.3, the combination of additional staff, additional activity and a new strategy has seen UCL's recruitment grow significantly faster than UK or Russell Group trends. This growth in enrolments correlates closely with those markets in which UCL invested additional resource in line with the previous Plan. We believe this activity has played a significant role in doubling international student fee income to £110 million per annum.

**6.3** The sophistication of and competition in international student recruitment continues to grow. Institutions keep investing in this area because the income stream is so important, the ROI is proven and significant, and because of a recognition that a failure to keep pace with competitors could result in the loss of market share and fee income.

**6.4** One area that has started to grow significantly is electronic marketing. The internet is a very different environment from even five years ago when the previous Plan was developed. It is imperative that UCL embraces new technologies to complement and enhance other marketing and recruitment activity. This is especially true if UCL wants to shift from a strategy of overall growth *per se* to one in which individual segments or subject areas are prioritised.

**6.5** The International Office is adequately resourced to maintain its current level of activity. However, expansion into other markets and the development of new activities will require additional resource.

**6.6** There are a range of markets into which UCL could productively implement new or expand current active recruitment. Similarly investment in electronic marketing is required to keep pace with competitors. For example:

- Expanding activity in North and Latin America. Investment in these markets over the duration of the last Plan has shown significant return and has helped to grow international recruitment in arts and social science subjects. The recent establishment of the UCL Institute of the Americas presents an opportunity for UCL to further increase its profile in and recruitment from this region. Activity in Brazil, Canada, Chile and the US to be increased and new markets developed, e.g. Venezuela, Peru and Ecuador;
- Additional activity in markets where UCL recruits well but could do better at the graduate level, e.g. Malaysia;
- Additional affiliate recruitment activity in Asian markets where there is potential to increase recruitment to subject areas less favoured by US affiliate students;
- Markets where we do not have an active recruitment presence, e.g. Indonesia, Vietnam, Mauritius, South Africa, Ghana and the Kurdistan Region of Iraq;
- Other markets where research indicates a potential for increased recruitment;
- An expansion of activity in EU markets targeting graduate students in particular; and
- Increasing activity directed specifically at prospective research students e.g. the 'PhD Workshop' in China.

**6.7** Similarly, investment in electronic marketing is required to keep pace with competitors. For example electronic marketing as set out in sections 3.3.10 and 3.3.11 and especially that directed to support faculties and departments in specific subject areas.

**6.8** Mindful of the development of three-year rolling plans and the likely need to focus on subject specific rather than overall growth, additional resource is required to implement the additional lines of work related to the development of subject led market research and recruitment activity as set out at section 4.4.



**6.9** In order to support the implementation of this Plan, the International Office will bid for:

- Two additional International Liaison and Recruitment Officers (at grade 7) to support an increase in marketing activity as outlined above and to ensure sufficient capacity for the new subject based lines of work;
- An International Officer (E-Marketing) (at grade 7) to build on and roll out existing pilot projects (see section 3.3.10) across all markets including those not visited, and to work with faculties and departments to establish virtual exhibitions and other remote marketing activities for specific subject areas;
- An International Assistant (at grade 5) to support additional activity; and
- An increase in the non-staff budget to support the increase in marketing activity.

Should developments in Stratford allow UCL to significantly increase its student population then the level of resourcing for international student recruitment will need to be further reviewed.

**6.10** Based on the experience of implementing the previous Plan, empirical evidence suggests that the approach proposed would be low-risk and cost-effective. The returns are likely to be substantial as compared to the investment outlay. The investment would be repaid by just 15 additional international student enrolments per annum. Significantly more can be expected.

**Dr David Stevens, Head of the International Office  
Communications and Marketing  
May 2012**



## APPENDIX: Key data

### 1. The growth of non-EU student numbers at UCL

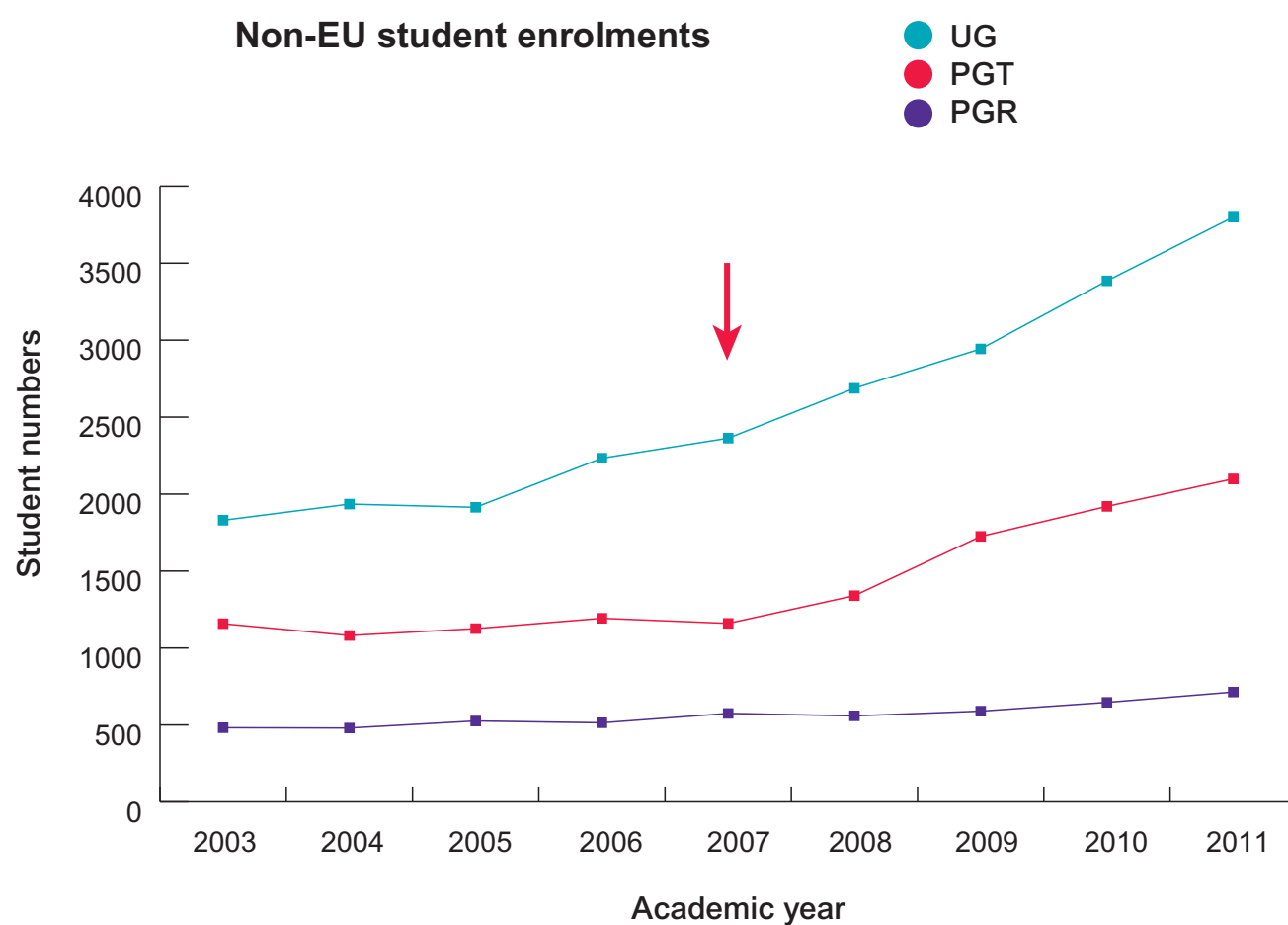


Figure 1. The growth in the enrolments of non-EU students at UCL 2003/04 to 2011/12. The red arrow indicates the point at which the last five-year Plan was adopted.

## 2. UCL's increasing success at recruiting non-EU students

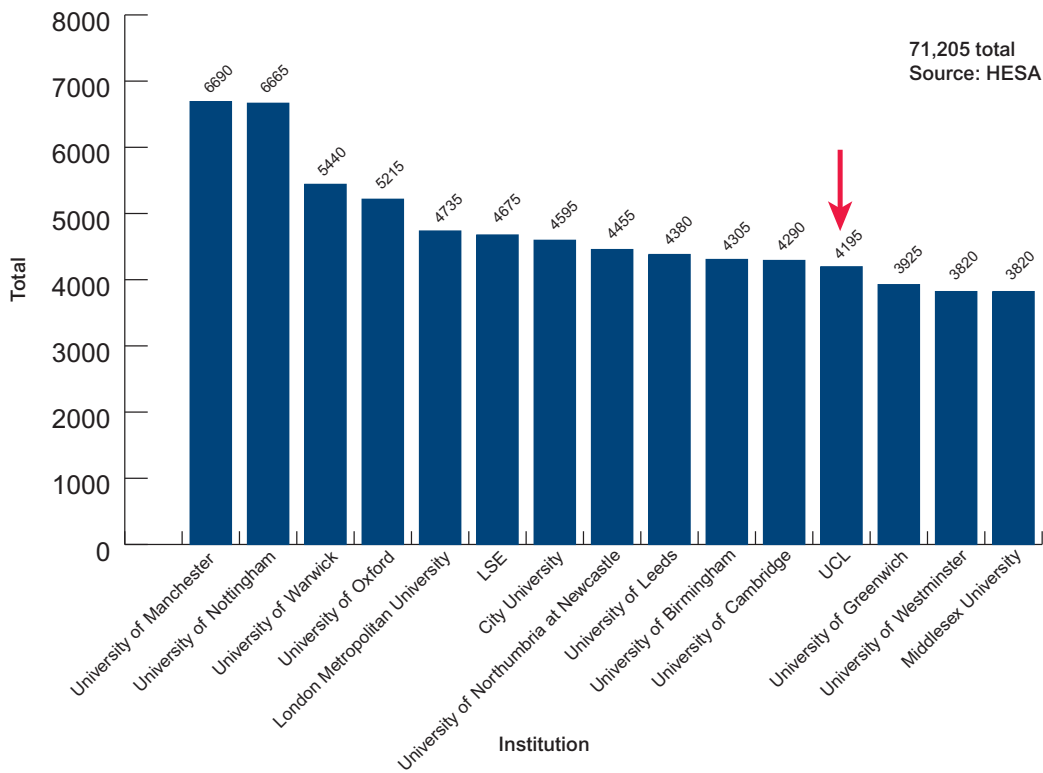


Figure 2. The top fifteen recruiters of non-EU students 2006/07. The red arrow highlights UCL's position.

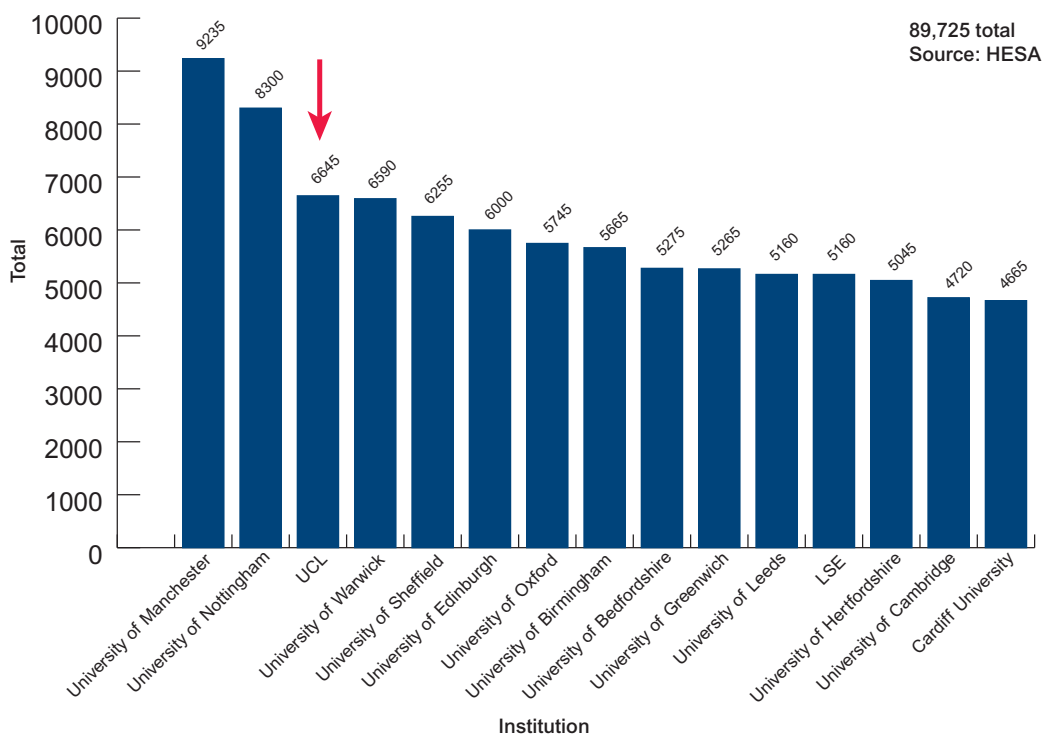


Figure 3. The top fifteen recruiters of non-EU students 2010/11. The red arrow highlights UCL's position.

### 3. The rate of growth in international student enrolments at UCL relative to competitor indices.

	2006/7		2010/11		Growth	
	Non-UK	Non-EU	Non-UK	Non-EU	Non-UK	Non-EU
<b>UK</b>	376,195	249,400	480,755	328,415	28%	32%
<b>RG</b>	112,035	77,580	146,815	103,680	31%	34%
<b>UCL</b>	6,470	4,195	10,315	6,645	59%	58%

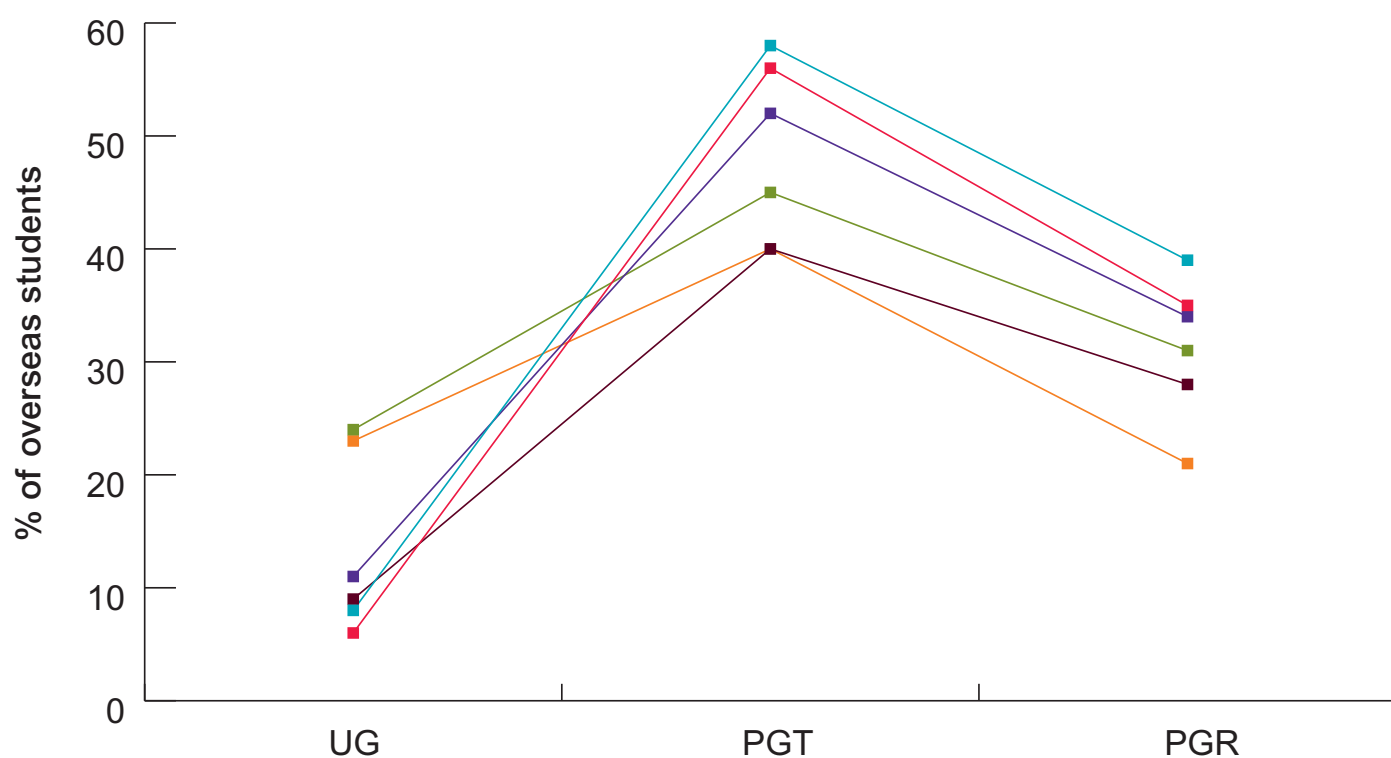
Table 1. Growth in international student enrolments: UK HEIs, Russell Group and UCL 2006/07 – 2010/11 (data source HESA student record)

	UCL's market share 2006/7		UCL's market share 2010/11		Growth in UCL's market share 2006/07 – 2010/11	
	Non-UK	Non-EU	Non-UK	Non-EU	Non-UK	Non-EU
<b>UK</b>	1.72%	1.68%	2.15%	2.02%	25%	20%
<b>RG</b>	5.78%	5.41%	7.04%	6.41%	22%	18%

Table 2. Growth in UCL's market share 2006/07 – 2010/11 (data source HESA student record)



#### 4. The proportion of non-EU students by level of study at UCL and competitors



	UG	PGT	PGR
<span style="color: cyan;">●</span> Oxbridge	8%	58%	39%
<span style="color: red;">●</span> UK	6%	56%	35%
<span style="color: purple;">●</span> Russell Group average	11%	52%	34%
<span style="color: green;">●</span> London Russell average	24%	45%	31%
<span style="color: darkred;">●</span> London average	9%	40%	28%
<span style="color: orange;">●</span> UCL	23%	40%	21%

Figure 4. The proportion of non-EU students as percentage of the total number of students at UG, PGT and PGR levels of study – for UCL and competitors.

## 5. UCL's profile overseas as a function of awareness v attractiveness among prospective UG, PGT and PGR students

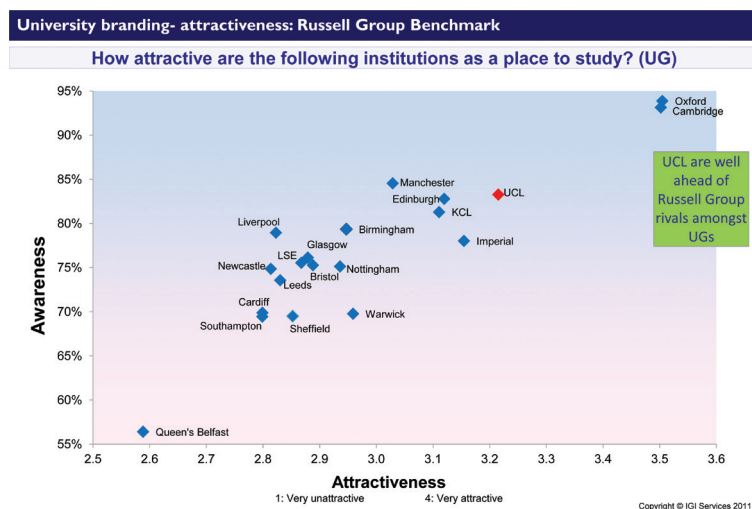


Figure 5. UCL's profile overseas as a function of awareness v attractiveness among prospective UG students

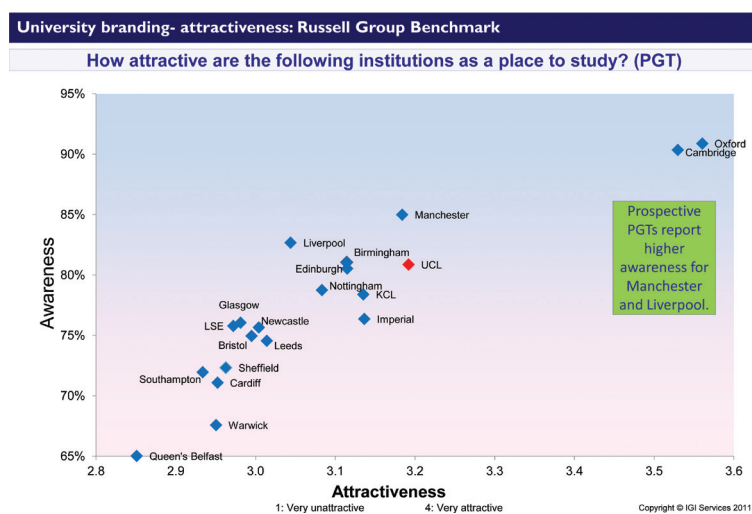


Figure 6. UCL's profile overseas as a function of awareness v attractiveness among prospective PGT students

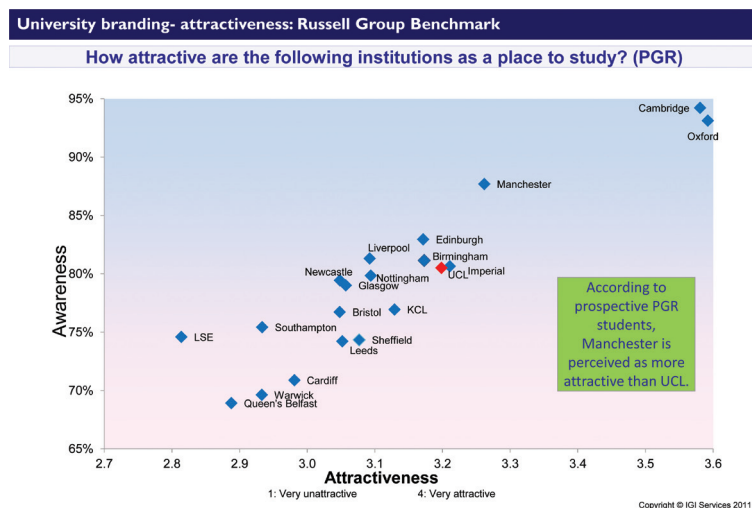


Figure 7. UCL's profile overseas as a function of awareness v attractiveness among prospective PGR students

6. Students by faculty

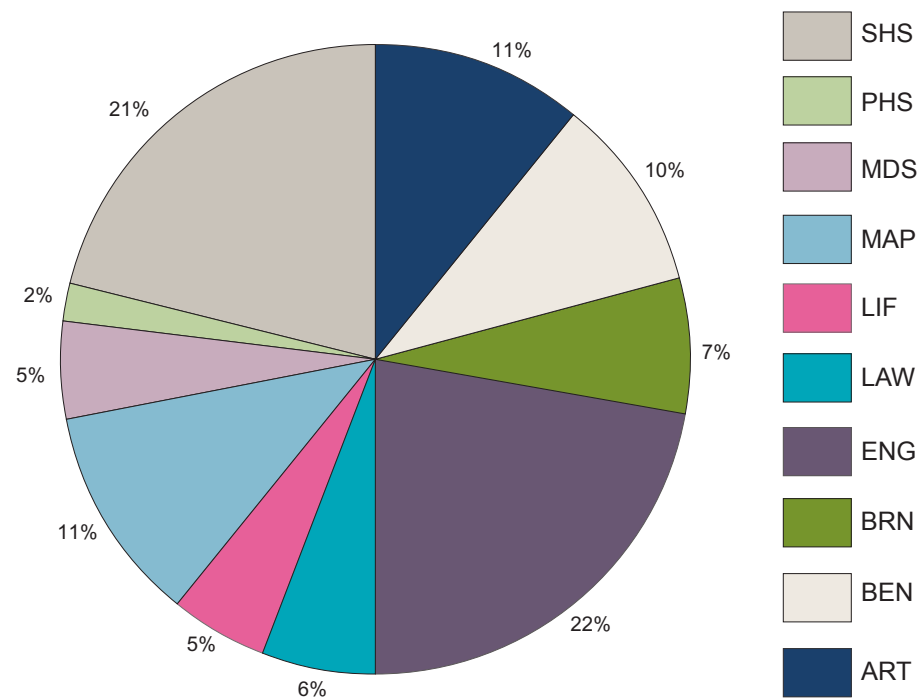


Figure 8. The distribution by faculty of non-EU students at UCL

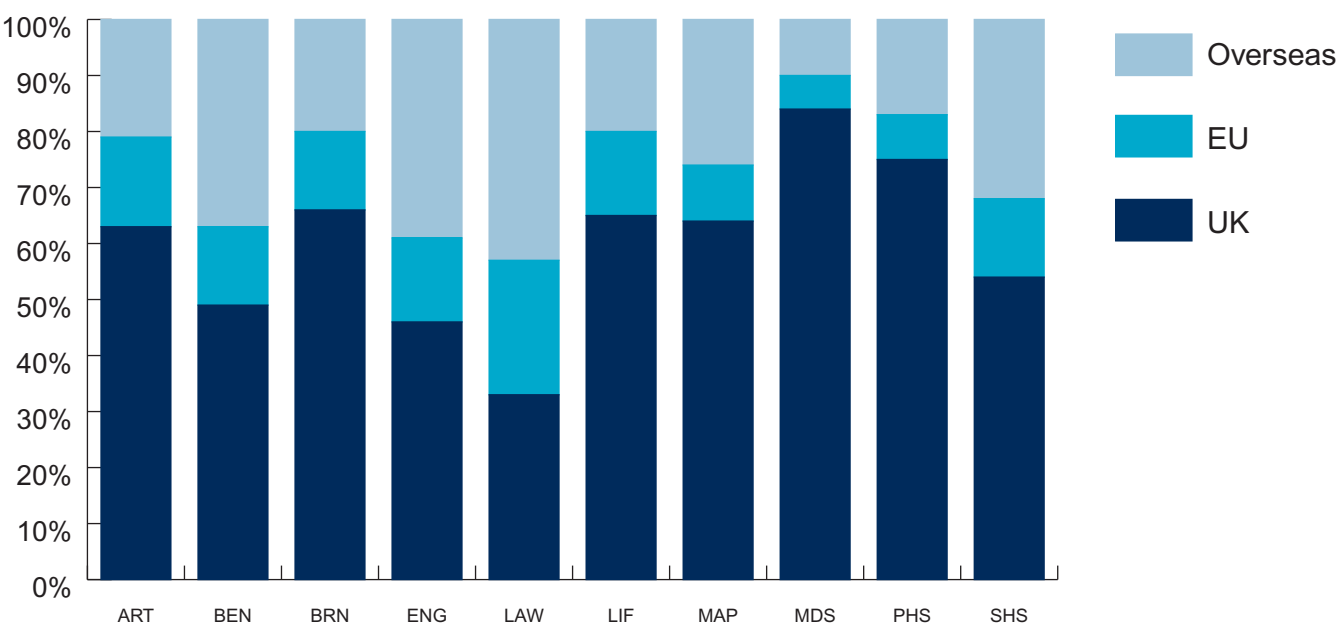


Figure 9. The relative proportions of UK, other EU and non-EU students in each faculty at UCL.

## 7. Primary source markets for UCL's international students

Country	Enrolment
China (People's Republic)	1470
USA	789
Singapore	540
Hong Kong	488
Malaysia	360
Korea (Republic – South)	249
India	217
Canada	169
Thailand	144
Japan	127
Russia	127
Nigeria	116
Kazakhstan	111
Taiwan	106
Saudi Arabia	99
Iran	83
Switzerland	83
Turkey	83
Pakistan	81
Australia	70
Vietnam	70
Mexico	63
Chile	57
United Arab Emirates	47
Norway	46
Brunei	38
Columbia	38
Bangladesh	37
Brazil	37
Egypt	36
Sri Lanka	36
Mauritius	32
Jordan	29
Kuwait	29
Lebanon	28
Israel	27
Kenya	27
Indonesia	24
Serbia	21
South Africa	20
Qatar	19

Table 3. UCL's top non-EU markets 20011/12 (excludes January starters)



Country	Enrolment
Germany	438
Greece	367
Italy	365
France	353
Cyprus (European Union)	238
Poland	204
Ireland	157
Spain	152
Romania	121
Netherlands	119
Belgium	117
Sweden	97
Austria	82
Portugal	79
Bulgaria	54

Table 4. UCL's top EU markets 2011/12 (excludes January starters)

## 8. International Office activity overseas

During the 2011/12 recruitment cycle the International Office has undertaken promotional and recruitment activity in the following countries:

Azerbaijan	India	Qatar
Bahrain	Italy	Russia
Brazil	Japan	Saudi Arabia
Brunei	Jordan	Singapore
Canada	Kazakhstan	Spain
Chile	Kenya	Sri Lanka
China	Korea	Switzerland
Columbia	Kuwait	Taiwan
Cyprus	Lebanon	Tanzania
Egypt	Malaysia	Thailand
France	Mexico	Turkey
Germany	Norway	UAE
Greece	Oman	UK
Guatemala	Poland	Ukraine
Hong Kong	Portugal	USA

A visit to Nigeria was cancelled because of a deteriorating security situation.



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