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**Minister for Education**



**Llywodraeth Cymru**  
**Welsh Government**

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Dear Lynne,

I am writing in response to the Committee report “Degrees of Separation?” published following the Children, Young People and Education Committee inquiry into the impact of Brexit on higher and further education.

My full response to the 12 recommendations is attached at annex A and I am pleased to be able to accept all 12 recommendations fully, in part or in principle.

The nature and impacts of Brexit are changing and uncertain in nature and the focus which the Committee has given to the potential impacts on higher and further education are welcomed by the Welsh Government. As you state in conclusion 2, “a no-deal scenario would still be significantly disruptive to both sectors”; as a responsible government, and given the increasingly likelihood of no deal we are doing what we can to help all partners to prepare including our schools, colleges and universities who benefit from EU membership. The Welsh Government has further intensified its work on no-deal contingency planning as it becomes increasingly apparent the UK Government has failed to negotiate an acceptable deal.

The Welsh Government remains committed to supporting HE and FE sectors in preparing for Brexit as we recognise their significant contribution to the economy, social justice, public services and culture in Wales and we have been very clear that we continue to welcome people from the EU working or studying in Wales.

Yours sincerely

**Kirsty Williams AC/AM**  
**Y Gweinidog Addysg**  
**Minister for Education**

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

## Children, Young People and Education Committee Report Recommendations

### Degrees of Separation? The Impact of Brexit on Higher and Further Education

#### **Recommendation 1**

The Welsh Government should proactively demand, via any future UK Immigration Bill, executive powers for Welsh Ministers that allow them to make spatially different immigration rules specifically for students and academic staff in Wales. Michelle Brown AM does not agree with this recommendation.

Agree in principle.

The Welsh Government agrees that Wales needs a higher education system that allows institutions to continue to collaborate freely and to work together across Europe and the globe. A system that allows our students to travel and study in other countries and ensures Wales continues to be a welcoming place for those from abroad to learn and to work. These collaborations must continue and we will work with universities to make sure that these bridges are maintained and strengthened in years to come.

The UK Government has committed to a 12 month engagement programme on their immigration system white paper “The UK's future skills-based immigration system”. The Welsh Government is looking at the likely results and economic impacts of the proposed changes for Wales and we will be putting forward our own evidence on the requirements of the Welsh labour market, including the appropriate salary threshold level. Our aim is to ensure the Welsh economy is not adversely affected by an overly restrictive migration system and that Welsh Universities are able to meet their future staffing and student needs.

Given the importance of EU citizens to our economic prosperity, and the interconnectivity between migration and our devolved responsibilities for public services such as education, higher education, health and local government, we have been seeking assurances from the UK Government that we will be given the opportunity to share our views with them and that they will be taken on board, before the UK Government sets out its future immigration policy.

It is disappointing that the UK Government have failed to do so.

#### **Recommendation 2**

The Welsh Government must commission a research project to answer the question of what motivates EU and other international students to come to Wales to study, and report back within the next 6 months. This research should consider the impact of the removal of the Tuition Fee Grant on EU student recruitment and develop a

range of proposals to help universities attract international students to study in Wales, including an evaluation of financial incentives.

Accept in principle.

The Welsh Government is able to provide help in promoting Wales and the high quality and standards of our universities, working with Universities Wales, the British Council Wales, Visit Wales and other partners to support the “Study in Wales” brand to help attract EU and other international students to study in Wales. We are also providing funding from Global Wales and Global Wales II to support their work.

As independent, autonomous bodies recruitment is a matter for the universities themselves. As such I would expect the sector to understand their markets and to undertake research to understand student’s expectations as well as being aware of the value of incentives. Indeed, Universities UK published “[A ‘No Deal’ BREXIT: Implications for universities and minimising risk](#)” in December 2018. This paper outlines the steps that the UK Government needs to take to mitigate the risks of a no deal BREXIT and the mitigating actions that universities should consider.

The Welsh Government recognises that the Higher Education sector will continue to face challenges in 2019-20 which are compounded by the ongoing uncertainty surrounding the UK’s exit from the EU. I am therefore expecting HEFCW to help provide some assurance that the sector is prepared for leaving the EU and that they can help the Government develop Wales’ place in Europe and the rest of the world.

### **Recommendation 3**

The Welsh Government must publish an evaluation of the Global Wales I programme and in its response to this report, demonstrate the application of any lessons learned from it to the new Global Wales II programme.

Accept.

It is a condition of funding that evaluations are undertaken of the projects and programmes it supports. The Welsh Government received Annual Reports on the effectiveness of Global Wales I and the effectiveness of the interventions in developing links between Welsh Higher Education Institutions (HEIs) and counterparts around the world as part of the Grant Agreement with Universities UK International. The reports are attached at Annex B.

Global Wales I was a much smaller programme than Global Wales II with a focus on identifying priority markets and then using Global conferences to promote Wales as a destination for international students to choose to study here through the promotion of Study in Wales. Global Wales II looks to expand on the activity undertaken through the predecessor programme. This will include ramping up

engagement with the priority countries identified (the USA and Vietnam), identifying further priority markets and expansion of activity such as the development of scholarship programmes with those countries. It will also include a refresh of the Study in Wales brand and the promotion of that more widely, including to Europe and into internal markets within the UK.

**Recommendation 4**

The Welsh Government must ensure that the Study in Wales website and marketing material, which is part of the Global Wales programme, is urgently updated and refreshed, not least to include information on the 2019/20 EU student funding guarantee.

Accept.

The Welsh Government will establish a Global Wales marketing sub-group to review the Study in Wales brand, website and future marketing content and materials. The sub-group will consider closer alignment of the Study in Wales brand with the 'Cymru Wales' nation brand, and the opportunity to adopt a more unified approach to promoting Wales to the world.

The highly successful Cymru Wales brand has already been applied across promotion of Wales for tourism, trade and investment, food and drink and GP and nurse recruitment campaigns. The next stage in the evolution of the Cymru Wales brand will be delivery of the Digital Gateway project and greater digital integration and impact. This project will involve the launch of a series of new web platforms for Wales in 2019 (centred on wales.com), and underpinned by a market-leading content marketing approach that will focus on engaging stories about Wales aimed at global audiences. The Global Wales marketing sub-group will consider opportunities to align the Study in Wales website and future investment in marketing content with the Wales Digital Gateway project.

**Recommendation 5**

The Welsh Government must, as part of its response to this report, explain how it is ensuring that the Global Wales II programme demonstrably benefits and supports all those Welsh universities that experience reduced demand from EU students.

Accept.

The Global Wales II programme has an evaluation of the activities it supports built into the design of the programme. A clear focus is an expansion of the Study in Wales brand into Europe to promote Wales as a destination of study. The aim is to support all Wales' HEIs to continue to attract European students in a post Brexit scenario and to explore other unexplored markets such as Vietnam and mid-west United States.

**Recommendation 6** The Welsh Government, as part of its response to this report, should provide information regarding the expected impact of the Global Wales II programme, including the expected student numbers and other quantifiable benefits.

Accept.

HEFCW is responsible for monitoring the delivery of the Global Wales II project and reporting to the Welsh Government on the expenditure, outputs and outcomes, as outlined in the Project proposal. It is required to provide annual reports on an academic basis and four interim narrative updates on progress made towards the agreed deliverables and on project activity. This includes increasing Wales' market share of the UK's recruitment of international and EU students. The Welsh Government has also set a target to double the number of Welsh domiciled outward student mobility during this Assembly term and Global Wales will have a part to play in that too.

**Recommendation 7**

The Welsh Government must work with the higher and further education sectors to put in place and test funding arrangements that will guarantee no financial disruption or uncertainty for ERASMUS+ students, particularly those on modern language degrees, taking into account the conditions attached to the current Treasury guarantee. The Welsh Government must report back to this Committee when it has done so.

Accept in principle.

Clearly the continuing uncertainty surrounding the UK Government's approach to Brexit is far from ideal and that uncertainty extends to the financial position and the funding of Erasmus+. The UK's financial contribution to the EU is held by HM Treasury, not by Welsh Government and in order to deliver a replacement scheme for Erasmus without cutting other programmes of activity, we would need that funding to be transferred to us from HM Treasury. The Welsh Government has been clear on the need for a Block Grant adjustment to cover the European funding which would have come to Wales; this is not something which has been resolved.

If the UK Government fails to secure participation in Erasmus+ and fails to deliver a replacement UK scheme, then in that scenario, the Welsh Government would need to look very carefully at the current range of Erasmus+ activity and consider what can be achieved with the resources available to us.

Erasmus+ is a UK wide programme administered by the National Agency, a partnership between the British Council and Ecorys on behalf of the Department for Education (DfE) in England and the Devolved Administrations of Northern Ireland,

Scotland and Wales. Officials continue to have regular discussions with counterparts regarding the operation of Erasmus+ under the terms of the HM Treasury guarantee and also on contingency planning for its continued delivery as the UK leaves the EU, including for those studying modern language degrees.

**Recommendation 8**

The Welsh Government must commission a further research project, building on the recent work which informed the international mobility pilot, to develop a more detailed picture of the impact of international mobility on the outcomes of students from under-represented groups in Wales, and report back to the Committee within 6 months.

Accept.

In January 2018, the Welsh Government appointed OB3 Research, in conjunction with the Wales Institute of Social and Economic Research, Data and Methods (WISERD) of Cardiff University, to undertake a scoping study with the key aim of providing evidence to support the development of an overseas study pilot.

Fieldwork included a literature review of international student mobility and a review of current funding provisions in Wales and overseas. Welsh Government officials and representatives from key stakeholder organisations including Higher Education Institutions (HEIs) were interviewed and interviews with past and current overseas students and focus groups with individuals interested in studying overseas were conducted.

Whilst the study found that there is a lack of data to enable full degree overseas study from Welsh-domiciled students to be quantified, the report does include an analysis of four years of HESA returns (2013-17) on Welsh-domiciled students studying in the UK who have undertaken a period of up to one year of study abroad. We know that the number of Welsh domiciled students, volunteering or undertaking work experience abroad remains low at under 2 per cent of the total Welsh domiciled student population. Indeed the report we commissioned from OB3 Research, in conjunction with the Wales Institute of Social and Economic Research, Data and Methods (WISERD) earlier this year noted that evidence suggests that Welsh domiciled students are less likely than their UK and European counterparts and international students generally, to undertake overseas study. Latent demand in Wales is likely to be low at considerably less than 200 per year.

The pilot itself, and its evaluation, will give us an opportunity to test that demand by offering short-term spells of study that will perhaps be more attractive to those students who might otherwise be put off by the idea of going overseas for longer. Indeed, the OB3 report notes that 'There has been a steady growth in the overall numbers of Welsh domiciled students studying, volunteering or undertaking work



experience abroad over the last four years, with the numbers almost doubling from 795 in 2013/14 to 1,430 in 2016/17 at a time when the overall population of Welsh domiciled students studying at HEIs declined by 10 per cent.’ The pilot gives us an opportunity to build on this.

### **Recommendation 9**

The Welsh Government must continue to press the UK Government on future regional investment being a devolved “made-in-Wales” solution and follow through on its commitment that future regional investment will not be subsumed into Welsh core-budgets and will remain multi-annual in nature.

Accept.

The Welsh Government position is clear that Wales must not be a penny worse off after Brexit. We launched our Regional Investment in Wales after Brexit paper on 14 December 2017, which develops our thinking on the future of regional investment policy in Wales. We will continue to press the UK Government to provide assurances that every penny of the £370m that Wales currently receives from the EU’ Structural and Investment Funds each year be replaced by the UK Government as a permanent upward adjustment to the Welsh Government’s budget.

### **Recommendation 10**

The Welsh Government must work closely with the higher and further education sectors when developing any detailed regional investment proposals, to ensure the key role universities and colleges play in reducing inequality and increasing productivity is taken into account.

Accept

The Welsh Government established the Higher Education Brexit Working Group in September 2016 to share intelligence and provide advice on the implications of Brexit. This now includes further education sector representation.

We value the contribution of this group and will ensure that through this group and our wider engagements with the sectors that their views and perspectives on a range of matters, including reducing inequality and increasing productivity are appropriately considered.

### **Recommendation 11**

The Welsh Government must commit to working jointly with the further education sector to jointly develop and publish a plan, funded by a EU Transition Fund bid and taking account of the differing regional needs, to identify and respond to any

changing skills demands in those sectors most likely to experience Brexit related disruption.

Accept.

The Welsh Government supports and recognises the important role that Regional Skills Partnerships (RSPs) have in producing regional intelligence informed by employers. RSPs submit annual reports to Welsh Government that highlight regional priorities for employability and skills, based upon employer needs. This approach is enabling Welsh Government to align regional skills provision to investment and growth opportunities as part of a move to implement a new strategic approach to post-16 planning and funding.

RSPs also provide strategic skills intelligence which underpin City Deals and Growth Bids. “The Independent Report of the Governance of Regional Skills Partnerships in Wales” by Dr John Graystone (March 2018) recommended that RSPs remain independent in their advisory capacity to Welsh Government and for RSPs to continue to act as arms-length bodies. This provides them with a key role to provide independent advice and guidance to Welsh Government with respect to identifying regional skills needs. This is a fundamental principle of the new post-16 strategic planning and funding approach which has the “demand led” concept at its centre.

The Welsh Government will ask RSPs to consult closely with their employer networks in order to inform our work on the impacts of Brexit on regionally significant sectors.

My officials are currently developing proposals for a series of skills projects to help build Wales’ resilience, to be considered for support from the EU Transition Fund. This work will be informed by direct engagement with our stakeholders.

### **Recommendation 12**

The Welsh Government must recognise the fundamental importance of research and innovation to the prosperity of Wales and recognise the danger inherent in falling behind England and Scotland in funding these activities in what is an extremely competitive setting. The Welsh Government must therefore begin to immediately fund the recommendations made by Professor Reid in his review.

Accept in part.

The Welsh Government accepts in principle the findings and recommendations of the Reid review.



The key messages that Welsh Government took from the review and are working on to take forward include:

- increasing the visibility and influence of Welsh research and in particular press forward with “a dedicated London presence to promote Welsh Research and Innovation”
- ensuring that Wales had parity in the levels of un-hypothecated research and innovation funding compared to the rest of the UK, where possible: This included strengthening the current Welsh research base to enable Welsh researchers to compete for a greater share of new UKRI-wide funding by implementing Diamond’s recommendation for QR funding and knowledge exchange funding, and in addition, incentivising Welsh researchers to win greater funding from outside Wales.
- increasing the coherence and impact of research and innovation support and funding for business in order to grow the existing scale of activity and achieve more effective engagement with investors, outside the Welsh Government post-Br-exit.

The first recommendation asked the Welsh Government to increase the visibility and influence of Welsh research by creating a new Welsh Research and Innovation London Office (WRILO) and as a direct result we are currently recruiting staff to undertake this new role. There is a critical need to rebalance science, research and innovation spending across the UK, encouraging regional growth and in pursuit of higher investment and productivity. We recognise that this team will have a vital role to play in increasing the visibility of Wales.

The second and third recommendations within the Reid Review relate to future resources, beyond existing budgets and will need to be considered as part of future budget considerations.

## NAFSA 2015: Report to Funders

### 1. Introduction

This report details universities in Wales' activities at the NAFSA 2015 conference and exhibition, and makes recommendations for future activity for Welsh universities' NAFSA presence going forward.

### 2. Background

NAFSA: Association of International Educators is a non-profit organisation for professionals in all areas of international education. This includes education abroad advice and administration, international student advice, campus internationalisation, admissions, outreach, overseas advice, and English as a second language administration. NAFSA's mission is to advance international education and exchange and global workforce development.

Each year, the NAFSA event brings together between 9,000 and 14,000 educators, influencers, practitioners and industry professionals in the field of international education for five days of training, workshops, educational sessions, and networking opportunities. The event is a one stop shop for business between countries in higher education, research, and innovation from across the globe. It is the largest single event for international educators in the world.

In 2015, the NAFSA annual conference and exhibition took place in Boston, Massachusetts, from 25-29 May. Wales' universities attended the conference, hosting a booth in the exhibition hall and a Wales reception where the new Study in Wales brand was officially launched. The Welsh presence was funded by Universities Wales (Unis Wales), British Council Wales (BC Wales), the Welsh Government (WG) and five of the Welsh universities each paying for a table on the stand.

This report is being submitted to the Vice Chancellors of Wales' universities, WG officials, and BC Wales.

### 3. NAFSA Exhibition

The NAFSA international education exhibition 2015 acted as a gateway for Wales' universities to meet face to face with around 300 overseas partners as well as hundreds of new contacts.<sup>1</sup> These ranged from institutional leaders to programme representatives, service and technology providers, and educational suppliers. The exhibition allowed university colleagues to: connect face to face with colleagues from around the world; discuss local needs; establish partnerships with institutions, organisations and individuals; and network.

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<sup>1</sup> See NAFSA Partners and Contacts table, page 6

NAFSA conference delegates this year came from more than 100 countries and exhibitors included Argentina, Australia, Belgium, Brazil, Canada, China, Costa Rica, Germany, Hong Kong, India, Indonesia, Italy, Japan, Malaysia, Mexico, Morocco, Norway, Peru, Poland, Russia, Singapore, Spain, Sweden, Taiwan, Thailand, Turkey, as well as the USA. 60% of participants were based in the USA. Of the non US participants, the make-up was:

- Europe 40%
- Asia / Pacific 34%
- Latin America 9%
- North America 16%
- Africa 1%

The event provided a forum for Wales to have a high-profile presence to showcase its offering. Universities in Wales worked together at the event primarily promoting Wales as a whole, with their respective university promotion underpinning the Wales-wide messages. Wales' universities remain keen to expand their presence in the worldwide market and build upon the extensive work undertaken in the last few years. This aspiration has been underpinned by a commitment in the WG's HE Statement:

*'Universities and the Welsh Government will work in partnership to develop international links that will help Wales become a partner of choice for international business and investment and destination of choice for international students and staff. Wales needs to strengthen and maximise the value of the international connections already forged by universities, using those connections to drive inward investment. Wales must project the consistent message overseas that we are open for business and that international students add to the richness and diversity of the student body and are, therefore, welcome and valued.'*<sup>2</sup>

It is also a key theme of the WG's tourism strategy '*Partnership for Growth*<sup>3</sup>' that states:

*'... the new strategy will mean focusing upon five key areas – Promoting the Brand, Product Development, People Development, Profitable Performance and Place Building. Overseas, the three key markets identified by the panel are Ireland, Germany and USA.... Our key to delivering growth during these difficult times will be working in partnership to maximise resources and intelligence and working together to make Wales a stronger tourism destination.'*

<sup>2</sup> [Welsh Government HE Statement](#)

<sup>3</sup> [Welsh Government Tourism Strategy 'Partnership for Growth'](#)

#### 4. Funding for Wales at NAFSA 2015

Universities in Wales had a budget of £52,500 for NAFSA 2015. This included 25,000 from participating universities as well as a grant of £15,000 from Welsh Government, £10,000 from Universities Wales, and £2,500 from British Council Wales. The breakdown of expenditure for Wales at NAFSA 2015 is included in Annex D.

Aberystwyth University (AU), Bangor University (BU), Cardiff University (CU), Swansea University (SU) and the University of Wales Trinity Saint David (UWTSD) each invested £5,000 in the Study in Wales stand. The University of South Wales (USW) also attended the conference and Wales reception, but did not opt for a table on the booth.

#### 5. Wales Activity at NAFSA 2015

Wales' presence at NAFSA comprised of two principal activities: the Study in Wales booth and the Wales reception. All the Welsh universities that attended provided comprehensive feedback on their attendance and participation at both events (detailed below). Universities met a range of new and existing partners and will be monitoring the impact of this activity moving forward as part of their wider international activities.

##### i) *The 'Study in Wales' Booth*

The booth is the most visual element of a country's presence at NAFSA and feedback from NAFSA 2014 was that Wales had to up its game in respect of the booth. Unis Wales used this feedback and ensured that the 2015 booth was visually impressive; two very large hanging banners with a striking image of the Welsh coast were visible from the entrance to the hall. The use of the new 'Study in Wales' logo and marketing materials provided brand continuity and a more professional look to the booth. The space (30'x 20') allowed for meeting space for the five universities who had contributed financially to the booth. University colleagues, their partners and passers-by all commented on the quality of the booth's finish and its striking appearance. The booth design is included in Annex B.

Catering was organised for a booth launch of 'Study in Wales' on 28 May to raise awareness of the brand (the main launch took place at the Wales reception on 26 May - see below). Universities Wales placed an advertisement in the hard copy of the Chronicle newspaper to coincide with NAFSA to drive traffic towards the booth. There were over 100 attendees at the booth launch, with most taking part in a competition to win Welsh themed prizes by entering their business cards into a draw (over 90 business cards were entered in total).

##### ii) *The Wales Reception (Main launch of Study in Wales)*

The Wales reception has become an annual event at NAFSA and is an opportunity for Welsh universities to meet with partners, maintain existing relationships, and to showcase the best of Wales. Given that the event has built a reputation for being welcoming and engaging, the decision was taken to organise a small scale event in terms of venue capacity and to invite all of the Welsh universities' key partners and contacts. This made for a busy

and vibrant atmosphere for the launch of Study in Wales and maintained partners' expectations in terms of the type of event staged.

The reception was well attended with the venue full to capacity (100 guests). The venue was decorated with Welsh flags and bunting and guests were served Welsh themed food and drinks, including Welsh cheeses provided by Welsh Government Trade and Invest in the US. The Vice Chancellor of Aberystwyth University, Professor April McMahon, gave a speech launching Study in Wales. The speech, which was very well received, was an opportunity to promote all of the Welsh universities and to highlight the key messages of the new Study in Wales brand.

iii) *Web and social media*

The launch of Study in Wales also involved launching the new [www.studyinwales.ac.uk](http://www.studyinwales.ac.uk) website and @StudyWales twitter feed. From 25 May to 1 June, @StudyWales tweets received over 37,000 views and over 1,200 twitter engagements. This boosted traffic to the website, which went from 0 (pre-launch) to over 250 visitors during the 5 day NAFSA period.

## 6. International Partners and Contacts

Overall, Welsh universities increased the number of collaborations made and meetings held during NAFSA 2015, demonstrating the value and consistent demand for a strong Welsh presence from Wales at the event.

The feedback detailed on the following pages has been provided by representatives of the institutions who attended:

- Aberystwyth University (AU);
- Bangor University (BU);
- Cardiff University (CU);
- Swansea University (SU);
- University of South Wales (USW)
- The University of Wales Trinity Saint David (UWTSD)

The table below outlines the number of **existing partners** met, the number of **new partners** met and the number of **new contacts** made during NAFSA. It also shows the figures from 2013-2015 for comparison:

University	2013 Existing Partners	2014 Existing Partners	2015 Existing Partners	2013 New Partners	2014 New Partners	2015 New Partners	2013 New Contacts	2014 New Contacts	2015 New Contacts
AU	14	29	27	22	34	22	11	48	5
BU	26	29	35	25	22	21	112	68	58
CU	14	14	36	11	22	38	0	54	169
SU	45	44	40	4	5	8	0	54	8
USW	10	16	34	34	18	11	0	64	31
UWTSD	n/a	n/a	14	n/a	n/a	6	n/a	n/a	9
<b>Total</b>	109	132	<b>186</b>	96	101	<b>106</b>	123	288	<b>280</b>

## Regional Spread

Taking existing and new partners together, Welsh universities met with partners from 22 countries worldwide whilst at NAFSA 2015. These were: the United States, Canada, Brazil, Argentina, Mexico, China, Hong Kong, South Korea, Singapore, Malaysia, Japan, Australia, New Zealand, Azerbaijan, Kazakhstan, France, Germany, Netherlands, Denmark, Sweden, Norway and Ireland.

Unfortunately, not all universities have returned a breakdown detailing numbers per country at this point. However, Cardiff University's figures provide a helpful example: of their combined total of 74 partners met, 46% were North American, 21% Asian, 14% Latin American, 14% Australasian, 5% European.

## 7. Feedback on the Wales Booth and Reception

The Study in Wales presence – both booth and reception - received positive feedback from Welsh university representatives, their international partners and passers-by. Below are some examples of their feedback:

*What a beautiful stand – I wish I'd studied in Wales!*

Sevsen Bati, Head of International Relations, Bezmialem Vakif University, Turkey

*The new Study in Wales booth is very striking with a friendly, open and inviting atmosphere. Congratulations, a great new booth for 2015.*

Evan Mills, University of Vermont

*Great design and loads of space. It was so much better than in previous years and looked very professional. We had lots of positive comments from partners.*

Rose Matthews, Cardiff University

*Feedback from my partners (about the reception) was excellent.*

Dr Robert Morgan, University of South Wales

University representatives were also asked for feedback as to how the Welsh presence could be improved in future years. Below are some of the ideas they expressed:

*The booth is a great space for meeting existing partners and a great showcase for "Brand Wales" However, there wasn't much of an opportunity for individual institutional branding and we would encourage more of this next year.*

University of Wales Trinity Saint David

*The 2015 booth made a dramatic impact at NAFSA, delegates were stopping to take pictures of the scenic banners. The investment in quality furnishings provided a professional and academic environment in which to hold meetings with existing/new partners. Again, location could have been better, but given the design of the booth, it did actually work well for us this year.*

Angela Jones, Swansea University

## 8. Benefits of Wales' Presence at NAFSA

As NAFSA is a worldwide conference it is a cost effective way of raising Wales' profile on the international stage and meeting colleagues from around the globe in one location. Colleagues from the participating Welsh universities all cite this as being the primary benefit for them of taking part.

It is widely recognised by universities, business and government that an international mobility placement can greatly enhance students' academic performance and employability<sup>4</sup>. Internationally focused degree programmes also enable universities in Wales to attract the best and brightest undergraduate students to their courses. The NAFSA conference enables universities in Wales to raise their profile globally, but especially in the US and Canada. This enables them to develop increased Study Abroad agreements (fee paying, incoming students for an academic year, semester or term, or summer programme) and articulation agreements with international universities. It is essential that we ensure that universities in Wales are able to continue to form these strategic partnerships to enable mobility activities, to remain competitive on the global stage. Wales' participation at NAFSA is critical for universities in Wales to develop these relationships and partnerships.

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<sup>4</sup>[Gone International Report](#) (2015)



It is not just universities that are benefitting from a presence at NAFSA. Increasing the research links and student mobility between universities in Wales and the USA also stimulates partnerships with industry, encouraging continuing investment in Wales which in turn has a positive impact on the Welsh economy. Aberystwyth University, Bangor University and Cardiff University for example have built close relationships with their Welsh cohorts in the USA, whose main task is promoting Wales for tourism, education, and business development. A range of American companies have relocated to Wales, or have opened branch offices here, for example, GE Healthcare, OSTC Trading Company, and Hartswood Films. There has also been substantial growth in industrial links in the creative industries, energy and natural resources, as well as in scientific and manufacturing partnerships. The USA is a significant investor in Wales, and it is vital for Wales to build on its profile at the event.

Further thought and discussion is needed on how Wales' NAFSA activity fits in with an enhanced export approach to international students and education in Wales, of the sort being pursued by the UK Trade and Investment (UKTI) initiative 'Education UK<sup>5</sup>' and the WG's 'Partnership for Growth' strategy. For Wales, NAFSA is a key opportunity to create new relationships for student exchanges, recruit incoming students, and to promote outward mobility for students in Wales to study in other countries. NAFSA provides a platform to advertise Wales as a country on the global stage, promote tourism, enable departmental exchanges and promote industry links for Wales and for universities in Wales.

## 9. Recommendations following NAFSA 2015

The key recommendations from Wales' NAFSA representatives following the 2014 conference and exhibition included: securing a continued presence at NAFSA going forward; securing a funding package comprising of university, government and British Council sponsorship early enough to book a prime location; to create a sharp new branding campaign; and to explore corporate sponsorship opportunities.

The vast majority of the recommendations from last year's conference have been achieved. For example, the launch of Study in Wales in time for NAFSA 2015 enabled Wales to showcase its distinctive new brand for the first time at the conference. Also, the new Global Wales partnership has set out a three year plan to support Wales' NAFSA activities going forward. Global Wales is currently in a position to provide match-funding of £27,000 for NAFSA 2016. However, this is dependent on a sufficient number of Welsh universities committing to invest in the stand. Without this it will be difficult to book a prime location in time for NAFSA 2016.

The key recommendations for 2016 are therefore as follows:

1. To secure a commitment of £5000 each from the Welsh universities keen to participate on the stand of £5000 (or £500 from those opting out of the stand and taking part in the reception). This will form part of the funding package already

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<sup>5</sup> [Education UK](#)

secured and agreed by the Global Wales partners and should be early enough in the NAFSA timetable, ideally by end September 2015, to ensure a prime location and significant and professional presence in the exhibition hall.

2. To ensure the Wales booth is located within the 'UK sector' in the exhibition hall, to emphasise that Wales is part of the UK – alongside the BC pavilion and the Study in Scotland stand. This is to a large extent dependent on the outcome of Recommendation 1.
3. To ensure enough scope for universities to display individual branding on the Study in Wales stand.
4. To use the WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception, for example, a Welsh drinks company. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.

## **10. The future of Wales at NAFSA: Next Steps**

The 2016 NAFSA annual conference and exhibition is taking place from 29 May – 3 June in Denver, Colorado. The conference theme is 'Building Capacity for Global Learning'.

Universities Wales will be discussing proposals at its Autumn 2015 committee meeting to reflect on how Wales' NAFSA activity dovetails with Global Wales' priority markets activities; the US looks highly likely to emerge as a priority market for the partnership.

**Annex A: Photographs from NAFSA 2015**

NAFSA Expo Hall and Study in Wales Booth (before opening of Expo Hall)



The Study in Wales Booth





## Booth Launch of Study in Wales



Partner meetings taking place on the Booth



A selection of other booths (Japan, British Council, Sweden, Norway)







Professor McMahon delivering her speech at Study in Wales launch / Wales reception



Annex B: Study in Waes booth – 3D rendering with graphics

Study in Wales 20x30



Study in Wales 20x30





## NAFSA 2016: Report to Funders

### 1. Introduction

This report details the 'Study in Wales' presence at the NAFSA 2016 conference and exhibition, and makes recommendations for future activity for Welsh universities' NAFSA presence going forward.

### 2. Background

NAFSA or 'Association of International Educators' is a non-profit organisation for professionals in all areas of international education. This includes education abroad advice and administration, international student advice, campus internationalisation, admissions, outreach, overseas advice, and English as a second language administration.

Each year, the NAFSA Annual Conference brings together between 9,000 and 14,000 practitioners and industry professionals in the field of international education for five days of networking, workshops and educational sessions. The event is a one-stop-shop for business between countries in higher education and research from across the globe. It is the largest single international higher education event in the world.

In 2016, the NAFSA Annual Conference took place in Denver, Colorado from 30<sup>th</sup> May to the 3<sup>rd</sup> June. Wales' universities attended the conference, hosting a booth in the exhibition hall, holding a 'Study in Wales' panel session on the conference floor and hosting a reception for international partners. The Welsh presence was funded by Universities Wales (Unis Wales), British Council Wales (BC Wales) and Welsh Government (WG) through the 'Global Wales' partnership as well as through contributions from the participating Welsh universities.

This report is being submitted to the Vice Chancellors of Wales' universities, WG officials, and BC Wales.

### 3. Benefits of attending NAFSA

#### Universities

NAFSA is a worldwide conference and as such is a cost effective way of raising universities' profiles on the international stage and meeting partners from around the globe in one location. The meetings conducted at NAFSA help to foster the relationship between our universities and key international partners, most of which send fee-paying students to Wales. This year colleagues met with around 250 overseas partners<sup>1</sup>, from study abroad and exchange partners to institutional and departmental level collaborations. Keeping those partners updated on changes that could influence the decisions of their students is vital to maintain a good working relationship. Colleagues from the participating Welsh universities all cite this as being the primary benefit for them of taking part.

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<sup>1</sup> See 'International Partners and Contacts', page 4

NAFSA conference delegates this year came from more than 100 countries. 60% of participants were based in the USA. Of the non US participants, the make-up was:

- Europe 40%
- Asia / Pacific 34%
- Latin America 9%
- North America 16%
- Africa 1%

### Wales

The US is one of Global Wales' two priority markets, making the NAFSA conference an invaluable opportunity to showcase our offer. As well as directly benefitting Welsh universities, NAFSA provides a high-profile platform to boost Wales' profile more broadly. Universities in Wales work together at the event promoting Wales as a whole, with their respective university promotion underpinning the Wales-wide messages.

The Study in Wales stand provides a visual centrepiece for promoting Wales as a tourist destination. The images shown in Annex A show the two large banners showcasing the Welsh coastline, which provide a striking backdrop to the stand and which generate a significant amount of interest from passers-by at the event. In addition to promoting Wales as a destination to colleagues representing universities across the globe, every international student that comes to Wales attracts on average two overseas visitors, resulting in over 50,000 international visits to Wales by friends and family of international students in 2014-15.

Research collaboration between universities in Wales and the USA also stimulates partnerships with industry, thereby encouraging further investment to Wales. Despite the fact that NAFSA is not intended as a conference to drive university-industry collaboration, the indirect benefit of the wider institutional partnerships consolidated at NAFSA should not be ignored.

In summary, for Wales NAFSA is an opportunity to create new relationships for student exchanges, recruit incoming students, and to promote outward mobility for students in Wales to study in other countries. NAFSA also provides a platform to promote Wales as a country on the global stage, boosting tourism, enabling departmental exchanges and promoting industry links with our universities.

#### **4. Funding for Study in Wales at NAFSA 2016**

Universities in Wales had a budget of £57,500 for NAFSA 2016; this was £5,000 higher than anticipated due to the participation of an additional university. The budget was comprised of

£30,500 from participating universities and a commitment of £27,000 from the Global Wales partnership.

Aberystwyth University (AU), Bangor University (BU), Cardiff University (CU), Cardiff Metropolitan University (CMU), Swansea University (SU) and the University of Wales Trinity Saint David (UWTSD) each invested £5,000 in the Study in Wales stand. The University of South Wales (USW) also attended the conference but did not opt for a table on the booth. USW contributed £500 for participation in the Wales reception.

The budget increase meant that an underspend of £5,943.67 was achieved. Global Wales's actual contribution to NAFSA therefore decreased to **£21,056.33**, with a commitment that the remainder would be ringfenced for NAFSA 2017. The breakdown of expenditure for Wales at NAFSA 2016 is included in Annex B.

## 5. Wales Activity at NAFSA 2016

Wales' presence at NAFSA comprised of two principal activities: the Study in Wales booth and the Wales reception. All the Welsh universities that attended provided comprehensive feedback on their attendance and participation at both events (detailed below). Universities met a range of new and existing partners and will be monitoring the impact of this activity moving forward as part of their wider international activities.

### i) *The 'Study in Wales' Booth*

The booth is the most visual element of a country's presence at NAFSA and feedback from NAFSA 2015 was that Wales had a much improved presence compared to previous years. Following this positive feedback, we decided to reuse the 'Study in Wales' branding and materials from 2015, enabling us to save on design and production costs and providing continuity in terms of the brand. The booth (20' x 20') allowed for meeting space for the six universities who had contributed financially to the booth. University colleagues, their partners and passers-by all commented on the quality of the booth's finish and its striking appearance.

Catering was organised for the booth for a 'Study in Wales' tea on the afternoon of the 31st May. There were over 100 attendees present at this event. Another addition to this year's booth was a photo-booth, which was hugely successful for networking and in drawing interest in the stand.

### ii) *The Wales Reception*

The Wales reception has become an annual event at NAFSA and is an opportunity for Welsh universities to meet with partners, maintain existing relationships, and to showcase the best of Wales. Given that the event has built a reputation for being welcoming and engaging, the decision was taken to organise a small scale event in terms of venue capacity and to invite all of the Welsh universities' key partners and contacts. This made for a busy

and vibrant atmosphere and maintained partners' expectations in terms of the type of event staged.

The reception was well attended with the venue full to capacity (100 guests). The venue was decorated with Welsh flags and bunting and catering was provided. The Vice Chancellor of Aberystwyth University, Professor April McMahon, gave a speech on the importance of our universities international partnerships. The speech, which was very well received, was also an opportunity to promote all of the Welsh universities and to highlight the key messages of the Study in Wales brand.

## 6. International Partners and Contacts

This year saw a slight drop in the number of partners and contacts made. This is most likely due to the drop in attendance of NAFSA generally this year, from 12,000 in 2015 to 9,500 in 2016. It is thought that this decrease was linked to the location of the conference.

The feedback detailed on the following pages has been provided by representatives of the institutions who attended:

- Aberystwyth University (AU);
- Bangor University (BU);
- Cardiff University (CU);
- Cardiff Metropolitan University
- Swansea University (SU);
- University of South Wales (USW)
- The University of Wales Trinity Saint David (UWTSD)

The table below outlines the number of **existing partners** met and the number of **new partners** met during NAFSA. It also shows the figures from 2014-2015 for comparison:

University	2014 Existing Partners	2015 Existing Partners	2016 Existing Partners	2014 New Partners	2015 New Partners	2016 New Partners
AU	29	27	30	34	22	33
BU	29	35	53	22	21	22
CU	14	36	27	22	38	16
SU	44	40	27	5	8	13
USW	16	34	17	18	11	6
UWTSD	n/a	14	11	n/a	6	4

<b>Total</b>	132	186	<b>165</b>	101	106	<b>94</b>

## 7. Feedback on the Wales Booth and Reception

The Study in Wales presence – both booth and reception - received positive feedback from Welsh university representatives, their international partners and passers-by. Below are some examples of their feedback:

*Excellent; the booth stood out with the amazing backdrop. The photo-booth was a massive and very much appreciated draw to the stand; it was well received by partners and a great way to put names to faces for future reference*

Kay Llewellyn, Exchange and Study Abroad Coordinator, Swansea University

*The reception was well-planned, with many partners choosing to stay the whole evening. Plenty of food and drink!*

Annika Axelsen, Study Abroad Manager, Cardiff University

## 8. Recommendations following NAFSA 2015

The key recommendations for NAFSA 2016 following on from the previous conference were:

1. To secure a commitment of £5000 each from the Welsh universities keen to participate on the stand of £5000 (or £500 from those opting out of the stand and taking part in the reception). This will form part of the funding package already secured and agreed by the Global Wales partners and should be early enough in the NAFSA timetable, ideally by end September 2015, to ensure a prime location and significant and professional presence in the exhibition hall.

**Achieved** – This was only possible due to an early commitment from Global Wales and the participating institutions.

2. To ensure the Wales booth is located within the 'UK sector' in the exhibition hall, to emphasise that Wales is part of the UK – alongside the BC pavilion and the Study in Scotland stand. This is to a large extent dependent on the outcome of Recommendation 1.

**Achieved** – Study in Wales was located next to the British Council stand in the exhibition hall

3. To ensure enough scope for universities to display individual branding on the Study in Wales stand.

**Achieved** – new signs were produced using some of the additional funding and these can be reused in following years.

4. To use WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception, for example, a Welsh drinks company. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.

**Ongoing** – this was not possible at NAFSA 2016, but as the conference will take place in LA in 2017, the team is exploring options for celebrity and alumni involvement through the Welsh Government office in California.

## 9. The future of Wales at NAFSA: Next Steps

The 2017 NAFSA annual conference and exhibition is taking place from 28 May – 2 June in Los Angeles, California. The conference theme is 'Expanding Community, Strengthening Connections'.

### Recommendations for future NAFSA conferences

1. Ensure early payment of funding contributions for NAFSA 2017 to allow for flexibility to manage unfavourable exchange rate.
2. Use WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.
3. Consider whether any materials, including those pertaining to the booth design, need replacing or upgrading for future conferences and assess the cost implications of this.



**Annex A: Photographs from NAFSA 2016**

**Study in Wales Booth**



**Stand Reception**





A selection of other booths





Wales reception







## Annex B: Breakdown of NAFSA Budget

### NAFSA 2016 BUDGET AND EXPENDITURE

INCOME	£	\$
Study in Wales	£21,056.33	
AU	£5,000.00	
BU	£5,000.00	
CU	£5,000.00	
SU	£5,000.00	
UWTSD	£5,000.00	
Cardiff Met	£5,000.00	
USW	£500.00	
	£51,556.33	\$82359.97
<b>BUDGETED EXPENDITURE</b>		
Booth Space	£19,574.01	\$29,457.91
Booth Design Fees	£5,429.59	\$7,615.00
Booth furniture fees	£11,364.66	\$15,678.68
Reception	£8,343.09	\$11,635.75
Tea and cakes	£1,508.67	\$2,134.01
Attendance costs UW	£2,805.75	
Photo Booth	£2,147.88	\$3,050.00
Cost for banners	£0.00	\$0.00
Promo Materials	£702.00	
Refund of booth costs	-£319.32	-\$415.96
Costs	£51,556.33	\$69,155.39
current balance	£0.00	

## **NAFSA Conference and Exhibition 2017**

**29 May - 2 June 2017 in Los Angeles, California**

Report to: Vice-Chancellors; Pro Vice-Chancellors; Global Wales board

### **Study in Wales participants**

Universities Wales

Aberystwyth University

Bangor University

Cardiff University

Cardiff Metropolitan University

Swansea University

University of Wales Trinity Saint David

University of South Wales

### **Introduction**

Wales benefits socially, culturally and economically from the presence of international students, who have an immediate and significant impact on our country. The strength of Welsh universities in attracting more than 22,000 students from 140 countries all over the world to study in Wales powers the economy, generates jobs and boosts export earnings through increased tourism. By attracting students from abroad, our high-profile, globally-connected universities contribute, both immediately and in the longer term, to the goal of raising the country's profile and attracting investment.

NAFSA, the Association of International Educators, is a non-profit organisation for professionals in all areas of international education. The NAFSA Annual Conference and Expo brings together more than 9,000 worldwide practitioners and industry professionals for networking, workshops and educational sessions. The event helps universities and higher education, research, student and marketing organisations do business in the largest international higher education event in the world.

Wales's universities attended the 2017 conference, with a booth in the Expo Hall and a reception for international partners. The Welsh presence was funded by Universities Wales, British Council Wales, and Welsh Government through the Global Wales partnership and through contributions from the seven participating Welsh universities.



## High-level aims

**Aim** To provide universities with an effective and cost-effective opportunity to create and maintain international institutional working relationships in order to enable international student mobility, particularly with partners from the USA, which is a Global Wales priority market.

**Achieved** In addition to the Global Wales contribution of £27k, seven universities each contributed £5,000 towards the total cost (£44k) of exhibiting in the Expo hall. The balance of contributions was used for a high-profile reception with partners, and for stand materials. Universities met with more than 300 potential, new and existing partners over the course of the event, from study abroad exchange partners to those at institutional and departmental level, and attended further educational and networking events. Some 60% of NAFSA conference participants are based in the USA.

**Aim** To work in partnership to project a consistent message internationally that Wales is open for business and that international students are welcome and valued. And:

**Aim** To raise the profile of Wales, Welsh universities and Welsh higher education globally to boost tourism, enable departmental exchanges and promote research and industry links.

**Achieved** More than 9,000 worldwide practitioners and industry professionals attended the conference and expo for networking, workshops and educational sessions. Hundreds of delegates visited the stand – many to discuss the Welsh offer with representatives - and all 500 dragon keyrings were gifted during the week. The large banners on the stand gave a striking backdrop, which generated significant interest from passers-by.

## Recommendations for 2017

**Aim** To ensure early payment of funding contributions for NAFSA 2017 to allow for flexibility to manage unfavourable exchange rate.

**Achieved** Thanks to an early commitment from Global Wales and the participating institutions.

**Aim** To consider whether any materials, including those pertaining to the booth design, need replacing or upgrading for future conferences, and assess the cost implications of this.

**Achieved** It was discussed, and later agreed that money would need to be set aside to update the booth design in 2018 as the backdrop had started to fade. Furthermore, it was unlikely to be used in future exhibitions given the limitations on where the backdrop could hang without obscuring the views of other exhibitors.

**Aim** To use WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.

**Achieved** The Welsh Government office in California helped to secure the use of the Counsel General's residence for the reception, and two UWTSD alumni were key elements of the reception. Furthermore, two LA-based Welsh actors were involved in the event as Study in Wales advocates. There was some exploration of corporate sponsorship (Penderyn Whiskey, Tŷ Nant).

### **Recommendations for 2018**

The 2018 NAFSA annual conference and exhibition, *Diverse Voices, Shared Commitment*, will take place from 27 May to 1 June 2018.

1. To explore other or new ways of increasing the resources for Study in Wales at NAFSA:
  - corporate sponsorship of the Welsh reception with Welsh Government, British Council and Welsh universities.
  - celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.
  - corporate sponsorship of the Welsh gifts or afternoon reception at the Expo stand.
2. To refresh and update the booth design and backdrop, and that the carry-over from the 2017 budget is put towards this.
3. To seek feedback from visitors to the Study in Wales stand and reception using an online survey, which can feed into future decisions about Study in Wales's positioning at the NAFSA Conference and Expo.

## Funding

Our budget for NAFSA 2017 was £61,944, up from £57,500 for NAFSA 2016 thanks to the participation of an additional university. This included:

- £35,000 from participating universities
- £26,944 from Universities Wales's Global Wales budget (which included a carry-over from the previous year)

and covered the costs of the stand, Wales reception, stand extras and the Universities Wales presence.

However, our 'buying power' reduced significantly due to a less favourable exchange rate. Given the budgetary constraints in 2017, it was agreed that Study in Wales would not commit to additional spending in areas such as afternoon tea and a photo booth.

There was an underspend of £1,895 for NAFSA 2017, which has been returned to the Global Wales budget.

## Wales activity in 2017

We supported a Study in Wales booth in the Expo Hall and a Study in Wales evening reception. Universities met a range of new and existing partners and will continue to monitor the impact of this activity and the value of their attendance at the conference.

### *The 'Study in Wales' Booth (organised by Swansea University)*

Study in Wales was located close to the British Council and Scotland stands in the Expo Hall, and had a more prominent presence than the British Council. As the most visual element of a country's presence at NAFSA, we used, for the third year, the Study in Wales backdrop and materials from 2015, saving on stand design and production costs, and providing branding continuity. The booth (20' x 20') provided meeting spaces for the seven contributing universities.

Participants, partners and delegates praised the eye-catching stand and backdrop.

*The Wales Reception (organised by UWTSD)*

The annual Study in Wales reception is a chance for Welsh universities to maintain partnerships, showcase the best of Wales, create a buzz around the Welsh presence and raise our profile on social media. The welcome at the small event with a big reputation has helped to strengthen the draw of the Wales reception. The response from attendees was extremely positive, and we also received extremely good feedback from delegates who had heard about the reception but hadn't attended.

The reception was held at the Consul General's residence in Los Angeles, and the venue was secured with the help of colleagues in the Welsh Government's US offices. The Consul General was in attendance and welcomed the guests and the delegation from Wales. The International Policy Adviser at Universities Wales, Emma Rączka, gave a speech on behalf of universities in Wales, and on the importance of our universities' international partnerships. The brief talk was also an opportunity to promote all of the Welsh universities and to highlight the key messages of the Study in Wales brand.

The reception was well-attended with approximately 70 guests. While we had expected more guests, we received feedback that the distance to the venue (normally 20 minutes) coupled with rush hour traffic (at least doubling the normal travel time) meant many decided at the last minute against attending.

The reception was supported by LA-based Welsh actors Luca Malacrino and Owain Rhys Davies. The guests told the invited audience how growing up in Wales had made them advocates for the nation, and how studying and working abroad had given them perspectives from which students considering universities in Wales could also benefit. Magician Paul Vu also entertained guests, and Hannah Schill photographed the reception. Both are alumni in acting from the University of Wales Trinity Saint David and California State University, Fullerton.

Twitter activity immediately following the Study in Wales reception at NAFSA included:

- Guest and actor [@owainRd Davies](#) tweeting about the reception (903 followers, 9 retweets, 43 likes). One of these retweets was by actress [@JoFroggatt](#) (435,000 followers).
- Guest and actor [@GLucaMalacrino](#) tweeting about the reception to 14,900 followers. This received 68 likes and 29 retweets.

- We are unable to get data about the ‘reach’ of these social media engagements as they were not initiated by Study in Wales.
- A similar tweet by Study in Wales received 7 likes and 5 retweets. It made 1,224 impressions (the number of times people saw this tweet on Twitter) and received 48 engagements (interactions).

### Feedback from Study in Wales partners - meetings

The table below outlines the number of existing partners met and the number of new partners met during NAFSA, showing figures from previous years for comparison:

University	Existing partners				Potential / new partners			
	2014	2015	2016	2017	2014	2015	2016	2017
Aberystwyth	29	27	30	16	34	22	33	10
Bangor	29	35	53	28	22	21	22	31
Cardiff	14	36	27	30	22	38	16	40
Cardiff Met	-	-	No data	15	-	-	No data	40
Swansea	44	40	27	39	5	8	13	8
South Wales	16	34	17	15	18	11	6	9
Trinity Saint David	n/a	14	11	16	n/a	6	4	6
<b>Total</b>	<b>132</b>	<b>186</b>	<b>165</b>	<b>159</b>	<b>101</b>	<b>106</b>	<b>94</b>	<b>144</b>



## Feedback from Study in Wales partners - Wales Booth and Reception

The Study in Wales presence – both booth and reception - received positive feedback from Welsh university representatives, their international partners and passers-by.

“The booth...looked and worked pretty well in my limited experience of NAFSA. I had a lot of pre-arranged meetings and occasionally felt I was hogging the table or suddenly needed a table at short notice so not sure how that was perceived by others, but I think it was all fine.

“The reception was excellent on every level. It was a little far out of town so logistically challenging for some and maybe that affected numbers attending, but it was nice to get away from downtown LA and the venue.”

“We really like the stand. Having Study in Wales provides a really positive branding message. If budgets get tighter in the future, I think there is the potential to keep the stand small, as a small busy stand is better than a larger empty one (and bearing in mind that many of our colleagues like to meet in their own booths/pavilions).”

“Booth was great, reception was a little bit far out but great for PR – Thanks to Emma for her celebs! Best speeches ever!”

“As it was my first time at NAFSA I couldn't compare it to previous years, but liked how the booth was set up and how Wales as a location was portrayed – the dragon keying souvenirs went down really well and even the daffodil and dragon props for photos with partners (although not sure how it compares to the photo booth from the previous year, as I'd heard great things about that!). Due to having a lot of pre-booked meetings, I was also concerned about hogging the table at times so moved to an empty table where possible, but not sure how representatives from other Welsh universities felt about that. I met a few partners at their booth where there were any obvious clashes with meetings, which worked well.

“The Reception was a fantastic event, really enjoyed and was a highlight of the NAFSA experience – guest speakers really passionate and great entertainment, but also feel it could have been even better attended if it hadn't been so far away – as it felt like other receptions I attended were a lot more central and easier to get to.”

“Not really any recommendations for the booth other than the usual - everyone should have their business cards on the counter, don't take over each other's tables etc. I did feel the reception was too far away; nice but too far away!”

“Booth worked well, need for updated design for backdrop.”

### Photographs from NAFSA 2017

#### Study in Wales Booth

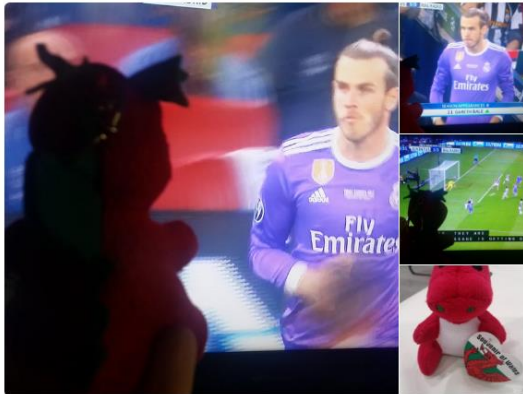




### Social media

We asked some delegates who received a gift from us to post a picture on social media using the hashtags StudyInWales and WalesNAFSA or mention @StudyWales.

 **David Comp** @DavidComp · Jun 3  
@StudyWales dragon from #nafsa17 cheering from Chicago as @GarethBale11 enters the UEFA! Champions League Final game in Cardiff



 **IDP Education USA** @IDPUSA · Jun 5  
Thanks @StudyWales, your dragon has arrived safely in Philadelphia! 🌍  
#nafsa2017





UniQuest @UniQuest\_UK · Jun 7  
Love our new office pet! Thank you @StudyWales #nafsa17



Lisa Shulman @LisaShul · Jun 14  
My new pet from @StudyWales decided to join me on a trip to Disneyland!  
#nafsa17 #wanderlust #studyabroad



David Comp @DavidComp · Jun 4  
#nafsa17 @StudyWales dragon is very excited for the U2 Joshua Tree show  
tonight at Soldier Field in Chicago!



The blog post written after the event had comments from Welsh actors Luca Malacrino and Owain Rhys Davies.

Luca (Grey's Anatomy, Criminal Minds) said: "As a proud Welshman, I can't emphasise enough the welcome international students have in Wales. I am always explaining to friends in the US how Wales is a country that gets under your skin, and once you go there the ties will last a lifetime. We need to make sure that Wales isn't a well-kept secret, and this is why I was delighted to work with Study in Wales to help bring Wales to the forefront of higher education for international students. I was fortunate to be an international student myself by studying in LA, and I would love to see even more students making the same leap to study across the Atlantic."

Owain (first Welsh actor to star in Twin Peaks) also underlined the benefits of studying in Wales. "It was an absolute pleasure being involved in such a marvellous evening and for such a great cause. To be part of making sure Wales is firmly put on the map where it belongs was significant for me as I want the world to be as in love with the land of song as I

am. Having had the good fortune to study abroad I know first-hand how it can expand your personal, professional, and academic life and I'm sure international students who embrace the adventures of studying in Wales will be richer for it. It's wonderful to see universities work together with such passion and commitment, and I hope that Study in Wales continues its success in bringing institutions together to make Welsh universities famous on the world stage."

Speaker Owain's own guest was Golden Globe Award-winning actress and Downton Abbey star Joanne Froggatt, which caused some excitement among the guests who met her, and further raised our profile on social media.

### Wales reception







Universities Wales @Unis\_Wales · Jun 9







### Expenditure comparison - 2016 and 2017

Income	2016 £	2016 \$	2017 £	2017 \$
Global Wales	21,056.33		<b>26,943.67</b>	
Aberystwyth	5,000.00		<b>5,000.00</b>	
Bangor	5,000.00		<b>5,000.00</b>	
Cardiff	5,000.00		<b>5,000.00</b>	
Cardiff Met	5,000.00		<b>5,000.00</b>	
Swansea	5,000.00		<b>5,000.00</b>	
Trinity Saint David	5,000.00		<b>5,000.00</b>	
South Wales	500.00		<b>5,000.00</b>	
	51,556.33	82,359.97	<b>61,943.67</b>	74,066.05*
Expenditure				
Booth Space	19,574.01	29,457.91	24,938.17	<b>30,250</b>
Booth Design Fees	5,429.59	7,615.00	3,551.52	<b>4,265</b>
Booth furniture fees	11,364.66	15,678.68	15,698.22	<b>18,793.91</b>
Reception	8,343.09	11,635.75	12,494.17	<b>14,939.75</b>
Tea and cakes	1,508.67	2,134.01	0	0
Attendance costs Unis Wales	2,805.75		<b>1,483.24</b>	1,564.59*
Photo Booth	2,147.88	3,050.00	0	0
Promo Materials - gifts	702.00		<b>877.50</b>	925.63*
Promo Materials – brochures and postage			<b>1,005.58</b>	1,060.73*
Refund of booth costs	- 319.32	- 415.96	0	0
Costs	51,556.33	69,155.39	60,048.40	71,800*
Balance	0.00	0.00	1,895.27	2,266.17

#### Note:

Costs in bold show original currency of transaction.

\*Approximate. Costs in GBP are final, and costs in dollars may be approximate (using an exchange rate of £1:\$1.1957).

Total in US\$ is approximate due to fluctuations in the exchange rate.