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Global Wales III Final Evaluation

November 2025



Executive Summary

Introduction

Global Wales III was led by Universities Wales and funded by the Welsh Government via Wales' international learning exchange scheme, [Taith](#). It aimed to provide a strategic and collaborative approach to promoting Wales' Higher Education (HE) and Further Education (FE) sectors through a range of coordinated activity in its four priority markets.¹ This included market development activity; partnership development activity; promotional campaigns and marketing through the Study in Wales brand; and funded scholarships. The scheme had four objectives:

- Increase student numbers from priority international markets;
- Maintain and grow partnerships in priority international markets;
- Generate additional export earnings from priority markets; and
- Increase the awareness and reputation of Welsh universities and FE colleges in priority markets.

This third phase built on two previous iterations of the scheme and reflected a substantial expansion of budget and scale. The original budget for Global Wales III was £10.28m awarded in 2022 with activities planned to be delivered over a four year period (2022-2026).²

This final evaluation, conducted by Wavehill, reviewed the scheme's delivery and management processes and effectiveness. It also assessed the scheme's progress towards its four objectives using contribution analysis. The evaluation report draws on various sources of evidence including scheme performance data; stakeholder interviews with the scheme's delivery team, Global Wales III board members, HE and FE representatives and international stakeholders; a survey of scholarship recipients; and a review of secondary research and evidence.

Delivery Context

The delivery of Global Wales III took place within a challenging and evolving context. External factors, such as the tightening UK immigration rules and ban on dependents likely reduced the UK's competitiveness as a study destination, negatively affecting international student recruitment. In addition, Brexit-related changes limited access of students from the EU to the same tuition fees, loans and grants available to domestic students.

¹ Note: The four priority markets included India (specifically the state of Karnataka), Vietnam, North America and Europe (specifically, Brittany in France and Baden-Württemberg in Germany).

² Note: In 2024, Universities Wales received confirmation from the Welsh Government that the scheme would end a year earlier than planned in July 2025.

This further constrained recruitment from European markets. At the same time, the financial pressures experienced by the HE sector in the UK and the increasing reliance of international student income has reinforced the scheme's importance.

During the second year of delivery, Universities Wales were notified by the Welsh Government of required budget reductions. In February 2024, Universities Wales received confirmation that the scheme would end a year earlier than originally planned and the final year budget would reduce to £1.3m, approximately half of the original allocation. This required the scheme to revise its operational plan and delivery model for the final year with activities scaled back and a reprofiling of budgets and Key Performance Indicators (KPIs).

Review of delivery

Rationale

Key Finding: The rationale for an international education scheme that promotes Wales distinct advantages internationally was seen to be strong though further cross-government coordination could help to further maximise its impact.

Stakeholders had positive views on the strength of the rationale for Global Wales III. It was stated that the original rationale, which stemmed from a need to promote Welsh HE and FE internationally to enhance the country's global standing, remained valid. Given the changing global context and increasingly challenging financial circumstances of universities, some felt the scheme was even more valid now than when it was first launched.

The rationale was also seen to extend beyond recruitment, contributing to Wales's soft power by projecting an image of openness and willingness to engage globally which was seen as important, particularly post-Brexit. Several stakeholders highlighted the potential for Global Wales III objectives to contribute to multiple policy areas. They noted that strengthening coordination and integration of the scheme across education, trade and investment, economic development and international relations functions of the Welsh Government would help maximise its potential benefits.

Scheme design

Key Finding: Stakeholders agreed that the Global Wales III objectives were broadly appropriate and aligned with the scheme's aims, particularly around student recruitment and reputation-building. However, progress against objectives were difficult to attribute directly to scheme activities, were less relevant to the FE sector and could have been more specific.

The overall objectives of Global Wales III were seen to be relevant and appropriate aligning well with the overall rationale for the scheme. Increasing international student recruitment, building partnerships and enhancing the awareness and reputation of Welsh HE and FE were seen to be the right ambitions for the scheme. However, several stakeholders highlighted the limitations in specificity and measurability of the objectives as well as their vulnerability to external factors. More specific objectives that related more closely to the immediate outcomes of Global Wales III activities may have strengthened the design.

Integration of Further Education

Key Finding: Global Wales III made good progress integrating the FE sector, expanding its visibility, partnerships, and participation in international activities. However, some FE stakeholders felt the scheme remained largely HE-focused, with objectives that did not always fully reflect FE priorities.

The integration of the FE sector into Global Wales III was widely recognised as a positive step forward, particularly when compared to earlier phases of the scheme. Several consultees highlighted the value of partnership opportunities that were made available to FE colleges, particularly in Canada. These partnerships were seen as strategically aligned with the strengths of the FE sector, especially in areas such as vocational education, skills development, and applied learning.

However, FE's inclusion in the scheme was directed by the Welsh Government after two previous HE-focused phases. While significant effort was made by the Global Wales III team and FE stakeholders to embed the sector effectively within the delivery model, this integration was, by nature, retrospective. As a result, some FE priorities were not fully reflected in the scheme's original design, its implementation and delivery.

Delivery of Scheme Activities

Key Finding: Delivery of market development activity helped to raise Wales' international profile and strengthened engagement in priority markets though clearer alignment with the Welsh Government's priorities and articulation of Wales' distinct offer would enhance future schemes.

Market development activities included recruitment events, delegations, advisor engagement, and conference attendance. They were seen as strategically targeted and well-executed, helping to build visibility and open doors for Welsh institutions. Global Wales III provided a front door and an outlet for international stakeholders to connect with Welsh institutions. Activities included roundtables, government and sub regional government meetings, and strategic alignment with the Welsh Government's overseas offices. While the market development strand was generally well received, stakeholders highlighted the need for clearer alignment between market development activities and broader Welsh Government priorities, particularly in relation to trade, innovation and soft power.

Key Finding: Seed funding enabled HE and FE institutions to test opportunities to translate system-level connections into institution-level collaborations. Although, they may be an opportunity for future schemes to provide more explicit signposting to follow-on funding sources to sustain partnerships.

Partnership development activity was facilitated by a grants programme that provided seed funding to Welsh institutions to support collaborative projects with organisations in priority markets. These projects focused on areas such as teaching and learning, research, innovation and system-level engagement. The partnership development strand complemented market development and system-level connections, providing institutions with the means to translate those connections into tangible collaborations through projects.

Stakeholders noted that the seed funding allowed institutions to initiate partnerships, test ideas, and expand their presence in key markets. Some felt the short-term nature of seed funding limited opportunities for deeper, sustained collaboration. However, it was a deliberate and strategic decision for Global Wales III to focus on stimulating partnerships rather than providing long-term support which would have attracted greater financial risk.

Key Finding: Stakeholders felt the Study in Wales activity was an important element of the Global Wales III delivery helping to enhance Wales visibility in priority markets and support recruitment efforts.

The Study in Wales strand of the Global Wales III scheme focused on destination marketing and brand development. Activities included digital marketing campaigns, conference presence, production of marketing assets, and ongoing stakeholder communications including newsletters for domestic and international audiences. Stakeholders praised the Study in Wales brand for its role in raising the profile of Wales internationally. It was seen as a valuable tool for promoting Wales as a country, rather than individual institutions, helping Welsh providers stand out within the broader UK offer.

Key Finding: Scholarship activity were seen to be valuable in attracting international students to Wales and helped to create a network of ambassadors positively promoting Wales in priority markets.

The scholarships strand of the Global Wales III scheme provided financial support to international students from priority markets to study at Welsh HE institutions. Stakeholder feedback suggests that scholarships were an important strand of the delivery, particularly in relation to the objective to increase awareness and reputation of Welsh HE and FE and supporting student recruitment. It was suggested scholarships helped to create a network of alumni acting as informal ambassadors for Wales as well as provided valuable marketing tool to generate interest in priority markets. Some stakeholders raised question marks over the value for money scholarships provided given the relatively few students that benefitted and the timeframe for soft power benefits to materialise.

Global Wales Impacts

The impact assessment applied a contribution analysis approach to assess the extent to which the scheme had met its four objectives. Rather than seeking to prove direct cause and effect, contribution analysis explores available evidence to arrive at plausible explanation of the contribution of the scheme's activities to the observed changes. The approach recognises that Global Wales III operates within a complex environment where multiple external factors influence outcomes. The assessment level and main findings for each objective are summarised in Table 1 overpage.³

³ Note: Four assessment levels were used: negligible impact, minor impact, material impact and major impact. The table does not present evidence for Objective 3: Increase export earnings as this objective is a derivative of Objective 1 and provides little additional evidence beyond what is already captured there.

Table 1: Overview of Global Wales III Impacts

Objective and Assessment	Main Findings	Evidence Gaps and Limitations
<p>Increase student numbers from priority international markets</p> <p>Material Impact</p>	<p>HESA data:</p> <ul style="list-style-type: none"> Overall international enrolments from priority markets grew (35% in 2023/24 vs. 26% in 2021/22). Strong growth in India market consistent with wider UK trends. Enrolments from USA increased by 40% from 2019/20 to 2023/24. Student recruitment from France and Germany declined. <p>Stakeholder consultations:</p> <ul style="list-style-type: none"> Study in Wales was cited as a valuable tool for building visibility and creating an interest at the top of the recruitment funnel. <p>Other evidence sources:</p> <ul style="list-style-type: none"> Study in Wales survey shows increased recognition and influence of brand in decision making. Advisor tour survey data indicated that US advisors had influenced hundreds of students to apply for Welsh institutions. 	<p>HESA data lag:</p> <ul style="list-style-type: none"> Analysis is based on partial HESA data as available data does not cover entirety of Global Wales III delivery. <p>Lack of conversion tracking:</p> <ul style="list-style-type: none"> No process in place to track or link Study in Wales marketing activity to concrete outcomes such as applications or enrolments <p>Limited stakeholder coverage:</p> <ul style="list-style-type: none"> Interviews with HE stakeholders often involved a single institutional representative, meaning findings may reflect partial views rather than an institution’s unified position.

<p>Maintain and grow partnerships in priority international markets</p> <p>Major Impact</p>	<p>Scheme KPI data:</p> <ul style="list-style-type: none"> • 111 formal partnerships were brokered or facilitated and 87 seed-funded projects took place. <p>Stakeholder consultations:</p> <ul style="list-style-type: none"> • Global Wales III described as key enabler of international partnerships, enabling institutions to build on system level connections. • Partnership development activities seen to strengthen Wales’s credibility and visibility internationally enabling institution level partnerships to develop. <p>Quarterly monitoring reports:</p> <ul style="list-style-type: none"> • Reports document a wide range of partnership activity in Vietnam, India, Canada, the USA, and Europe, including new MoUs, joint research projects, and system-level agreements. <p>Survey of partnership funding recipients and delegates</p> <ul style="list-style-type: none"> • Almost all respondents continued collaborating after initial funding, with many planning further work and some securing additional resources. 	<p>KPI evidence collection</p> <ul style="list-style-type: none"> • KPIs focus on activity counts rather than outcomes, offering limited insight into the longevity, quality or strategic value of partnerships. • Reporting does not clearly distinguish Global Wales III’s role from that of other actors (e.g. British Council, the Welsh Government), making attribution difficult. <p>Survey limitations</p> <ul style="list-style-type: none"> • Partnership and delegate survey evidence is qualitative and self-reported, with small samples that limit generalisability and confidence in conclusions.
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<p>Increase the awareness and reputation of Welsh universities and FE colleges in priority markets</p> <p><u>Material Impact</u></p>	<p>Scheme KPI data</p> <ul style="list-style-type: none"> • Study In Wales metrics provide evidence of 1.4 billion impressions; 18.4 million website visits; 898,407 leads and 244 million video views. • Over 3,500 applications were received and 95 scholarships awarded. <p>Study in Wales Brand Tracker evidence:</p> <ul style="list-style-type: none"> • Brand familiarity rose from 21% (2022) to 44% (2025), and brand awareness from 12.5% to 47%, showing strong growth. • Positive perceptions of Wales increased, especially in India, and consideration to study in Wales rose after exposure to Study in Wales advertising. <p>A survey of Global Wales scholarship recipients:</p> <ul style="list-style-type: none"> • Recipients reported highly positive experiences of studying and living in Wales—describing it as welcoming, inclusive, and culturally enriching. • Many said they encourage others to study in Wales and act as ambassadors for Welsh HE. <p>Stakeholder interview evidence:</p> <ul style="list-style-type: none"> • Global Wales III raised the profile of Welsh HE and FE through a unified national approach, seen as an advantage over competitor nations. • Stakeholders noted examples of reputation gains, but called for clearer messaging on Wales’s unique strengths and a sustained market presence to maintain visibility. 	<p>Evidencing reputation change</p> <ul style="list-style-type: none"> • Brand tracker and stakeholder feedback indicate greater visibility, reputation is difficult to measure and shaped by many external factors, so findings should be viewed as indicative rather than definitive. <p>Stakeholder coverage</p> <ul style="list-style-type: none"> • The number of international partners consulted means findings reflect partial perspectives rather than a comprehensive view of Wales’s reputation.
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Recommendations

- 1. Develop a national international education strategy to align scheme activities with broader Welsh Government policy objectives.**

A unified strategy would provide coherence across departments, reduce duplication, and strengthen Wales's international positioning by articulating a clear national offer.

- 2. Engage HE and FE stakeholders in consultation to define the strategic purpose, priorities, and delivery model of future international education schemes.**

Consultation will ensure that future schemes reflect the distinct needs and capacities of both sectors, generate buy-in, and alignment between a national scheme and institutional priorities.

- 3. Assess the feasibility and desirability of a unified scheme serving both HE and FE, including whether differentiated models would better reflect sector-specific priorities.**

The evaluation found that FE institutions often operate with distinct international goals and delivery mechanisms, suggesting a greater level of tailoring may be needed for future iterations of international education programmes.

- 4. Continue to ensure the process for determining priority markets is collaborative and inclusive, recognising the inherent uncertainty in forecasting market trajectories and the need for consensus across multiple stakeholders.**

A structured and transparent review process that incorporates regular horizon scanning and engagement with universities, the FE sector, and the Welsh Government would help ensure that selected markets remain aligned with Wales' evolving international priorities and areas of opportunity for recruitment, research, and partnership development.

- 5. Maintain and enhance the Study in Wales brand as a central component of Wales's approach to branding and promoting its international education offer.**

The brand was widely valued for raising awareness and positively impacting on student's decisions to consider Wales as a study destination. Where possible, future schemes should seek to build in more robust mechanisms for linking marketing activity to recruitment outcomes.

