

Manx Graduates' Survey 2017

Initial Report (December 2017)

1. Background

The 2017 Manx Graduate Survey was conducted to discover more about the influences upon graduate decision making with regard to returning , upon graduation, to the island or not. A similar survey was conducted in 2004 and this data contributes to government policy and practice in supporting access higher education. The Isle of Man Government commits £9 million to support Manx residents to undertake higher education study primarily off island but also on-island. There were three additional factors driving the survey in 2017.

1.1 The 2016 Isle of Man Census- decrease in population in 20-24 age group

The publication of the 2016 Isle of Man census demonstrated that the islands population had fallen by 1.4% and the economically active population had fallen by 8%. Overall the population had decreased most significantly in the 20-24 age groups with a net cohort change of (-686) compared to (-203) in the 2011 census.

This led to a widely publicised concern that this could be an outcome of fewer graduates returning to the island than in previous years. The majority of Manx graduates covered in this 2017 survey would be within the 20-24 age cohort. The 2017 survey sought to identify any 'instructive' changes in graduate decision making since 2004 that may have contributed to the decrease in the 20-29 year olds living on island.

1.2 Strategic intent to grow on island higher education provision

Increasing the provision of on island higher education is a strategic objective of the Department of Education, Sport and Culture (DESC) and the University College Isle of Man (UCM). UCM and the Office for Human Resources (OHR) currently offer twelve undergraduate programmes, professional masters level courses and a range of CPD at level 4 and above and further growth aims to both reflect the aspirations of island residents and the skill needs of the island. There are currently 430 students studying either part or full time in these programmes. What can we learn from graduate decision making that will guide on-island provision?

1.3 Current and predicted skill shortages on island

The overall unemployment rate remains low on island however growth employment areas are also those with the highest levels of immigration. Employment in *ICT (including e-gaming)* and *Medical and Health Services* account for 52% of the migrant working population. The traditional employment sector of *Finance and other Business Services* account for a further 15% the migrant working population.

What can we learn from graduate decision making that might increase the number of Manx graduates benefitting from the islands growth employment areas?

This report highlights the initial key findings. Further analysis of the data will follow in early 2018 and in addition those respondents, who agreed, will be contacted to seek further information.

2. Method

Survey of 10 questions was sent to a selection of graduates since 2012/13 who had received a Student Grant from DESC and had agreed to a data protection opt-in. The survey included questions on residency, employment & reasons for returning to the Isle of Man or not and were designed by DESC and Department of Enterprise (DE).

Responses were distinguished between:-

Students who graduated in 2017- Survey Cohort 1

Students graduating between 2012/13 and 2015/16 (four cohorts of graduates) -Survey Cohort 2

A similar survey was conducted in 2004 albeit a different methodology. It was however possible to legitimately and usefully compare results in a number of aspects including the reasons stated to return or not return to the island.

Three main approaches were taken to analyse the data:-

2.1 A thematic and quantitative analysis was conducted with regard to:-

- Reasons (or intending) for return and Reasons (or intending) for not returning,
- A comparison was made between three cohorts, the 2004 survey, cohort 1 and cohort 2 with regard to *Reasons (or intending) for return* and *Reasons (or intending) for not returning*.

2.2 These two categories were then correlated with type of subject studied for 2017 graduates (cohort 1).

2.3 Proposed incentives that would encourage a graduate to return to the IOM were categorised and a comparison made between cohort 1 and cohort 2

2.4 Responses

Return Rate: 38% return rate (452/1189)

Gender: 56.7% of all responses were from female graduates and 42.7% were from males with 0.6% of respondents preferring not to say.

Level of Study:
74% (335) honours degree
20% (89) postgraduate
6% (289) other

3.Key Findings

NB: Where the following findings refer to 'three surveys' that is in reference to a similar survey conducted in 2004 and the two surveys conducted in 2017 namely, 2016/17 graduates (cohort 1) and those that graduated in from 2013/14 to 2015/16 (cohort 2).

3.1 In the 2017 survey(s), there is no evidence of a reduction of graduates who return or intend to return compared to 2004.

In the 2017 survey(s):-

- 45% of respondents who graduated in 2013/14 to 2015/16 (cohort 2) live in the Isle of Man
- 44.5% of respondents who graduated in 2017 (cohort 1) wanted to return to the Isle of Man ASAP and 12.5% planned to return within next 2/3 years. A further 25% were unsure of their plans and 19% did not intend to return

i.e. the majority of graduates want to return to the island

Taken together, the three surveys offer some useful insights into the extent to which students from the Isle of Man return to the island after graduating. The surveys may contain some bias in that those who responded might be likely to include a higher proportion of graduates with stronger links to the Island. In short, they may over-represent the number of those who have returned or intend to return. The 2004 survey drew a sample of 1000 students over the ten year period 1994 to 2004 and estimated that between 35% and 50%. A 'like for like' comparison for the numbers returning /intending to return between 2004 and the two 2017 surveys is therefore not possible due to differences in survey design and time span. That said all three surveys appear to offer a similar 'ball-park' figure of 40-50% of graduates returning to the island.

This figure is broadly comparable with the experience in the Channel Islands. Jersey reports that 50% of their graduates return to the island (States of Jersey Higher Education Funding 2016) and Guernsey reports that 33% of 2016 graduates had returned to employment on the island, their lowest figure in five years (Guernsey Press, 17 Aug 2017).

3.2 The reasons for returning to the Island have largely remained the same in the 2004 and 2017 survey(s).

The three main reasons stated for returning to the island after graduation have remained the same across all three surveys. Namely '*My family live on the Isle of Man*', '*Safe environment*' and '*I like the lifestyle/environment*'.

Figures 1 to 3 illustrate the consistency and strength of these three reasons for the 2017, 2013/14 to 2015/16 and 2004 surveys respectively.

With regard to employment:-

- 75.6% of graduates (both survey cohorts, 342/452) have secured fulltime employment
- 74% of graduates living in the IOM have employment related to their long term career plans (69% for graduates not living in IOM).

Figure 1: Reasons for returning to the Isle of Man - 2017 Graduate Survey

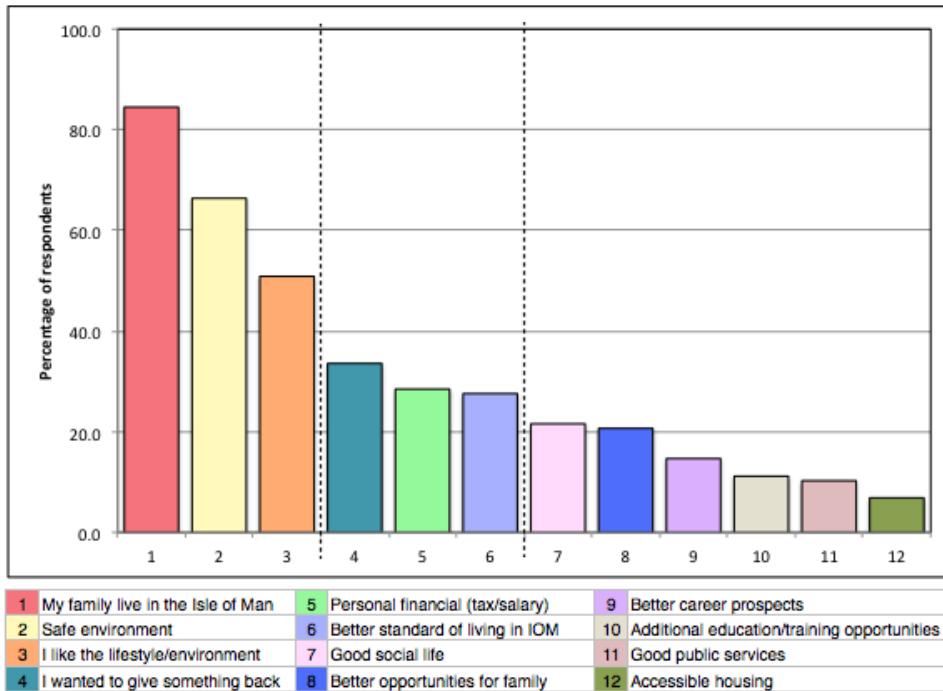


Figure 2: Reasons for returning to the Isle of Man - pre-2017 Graduate Survey

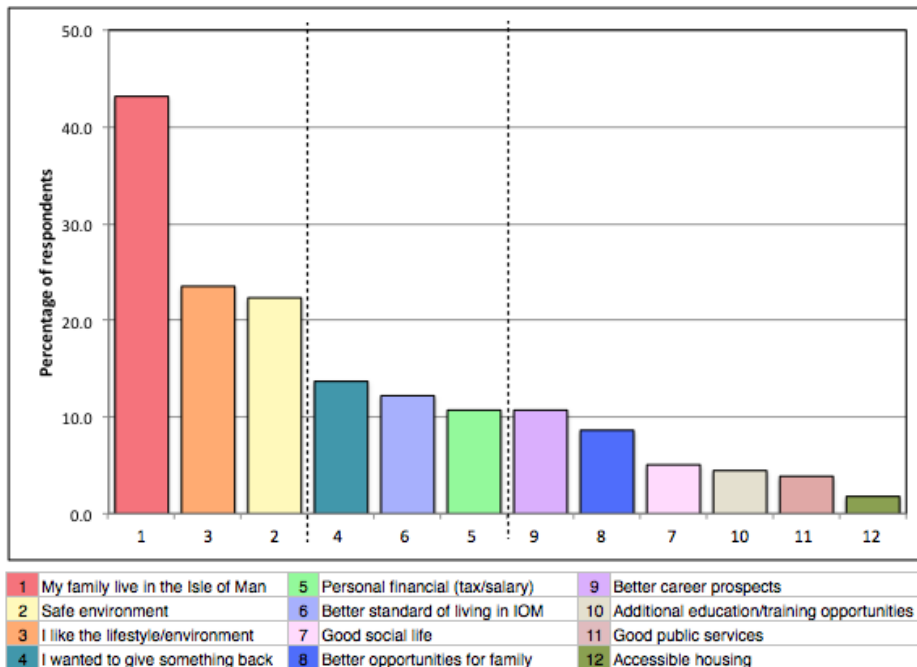
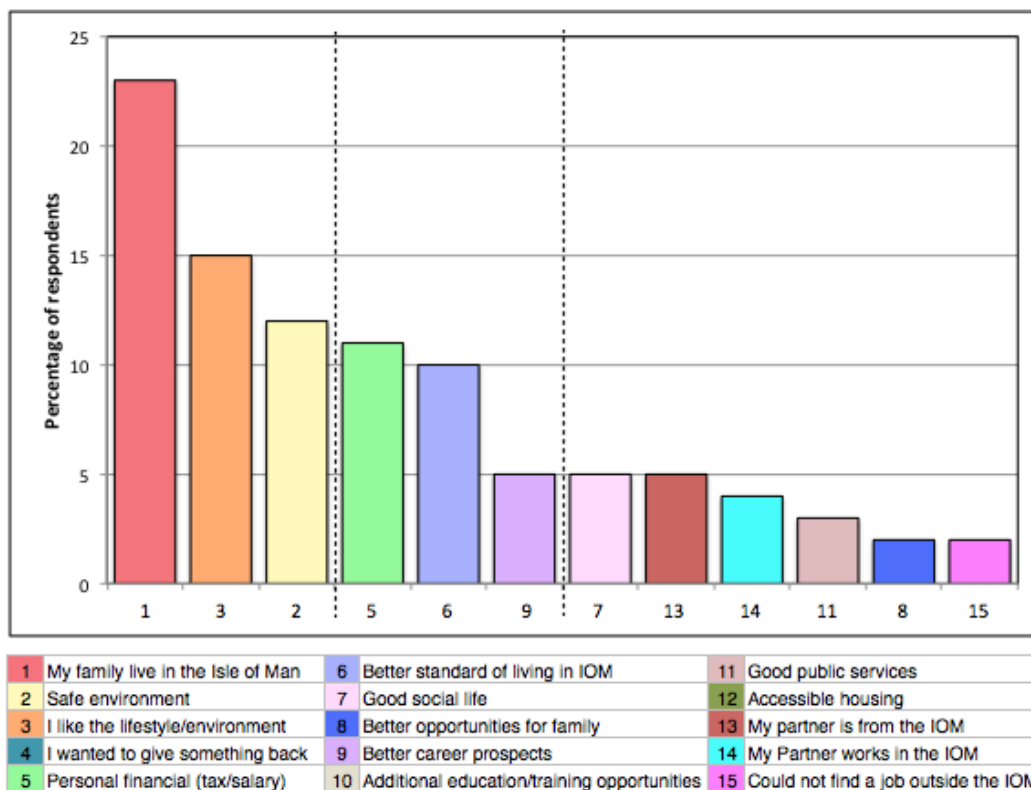


Figure 3: Reasons for living in the Isle of Man - 2004 Graduate Survey



3.3 Reasons for not returning are concentrated in ‘jobs in my profession not on island’, ‘poor career prospects’ and ‘social life’ in all three surveys however graduates in 2017 and in 2004 also strongly cited ‘high travel costs’ and ‘housing is too expensive’.

NB: the design of the 2017 surveys and the 2004 survey with regard to this topic was different making direct comparison limited. However the following facts emerged.

Employment related factors are most often cited as the reasons to not return to the island or living elsewhere. In particular:-

- 38% of 2017 Cohort 1 graduates cited poor IoM career prospects as being a factor for not returning to the IoM
- 37% of 2017 Cohort 1 graduates stated that their desired/chosen profession not being available in the IoM as being a factor for not returning.
- 53% of 2017 graduates cited high travel costs as a reason not to return to IOM
- The cited incentives to encourage graduates to return to IOM (sec 3.5) do not correlate strongly with the cited reasons or disadvantages to return.
- It is not clear why the concerns of 2017 and 2004 respondents about high travel and housing costs is not reflected in the 2013/14 to 2015/16 survey and will be explored further in follow up interviews. Possibly as a new graduate in 2017 these costs are more prominent than the 2013/14 to 2015/16 respondents who will now be established residents.

Figures 4 & 5 illustrate the reasons for NOT returning to the IOM/living elsewhere for the two 2017 surveys and Figure 6 the multiple disadvantages of living in the IOM cited in 2004 survey.

Figure 4: Reasons for not returning to the Isle of Man - 2017 Graduate Survey

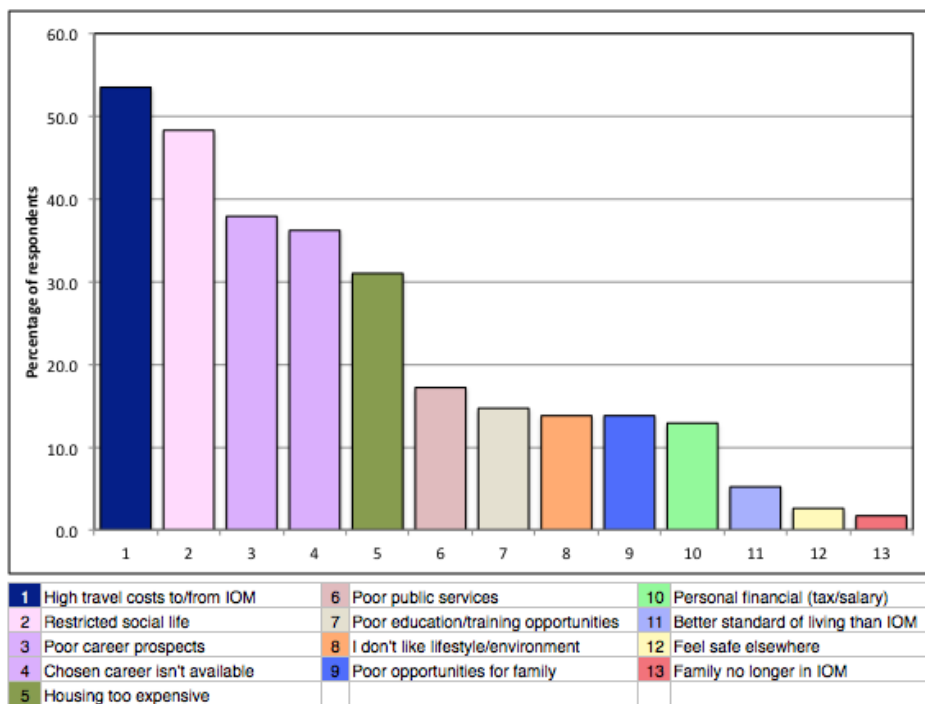


Figure 5: Reasons for living elsewhere - pre-2017 Graduate Survey

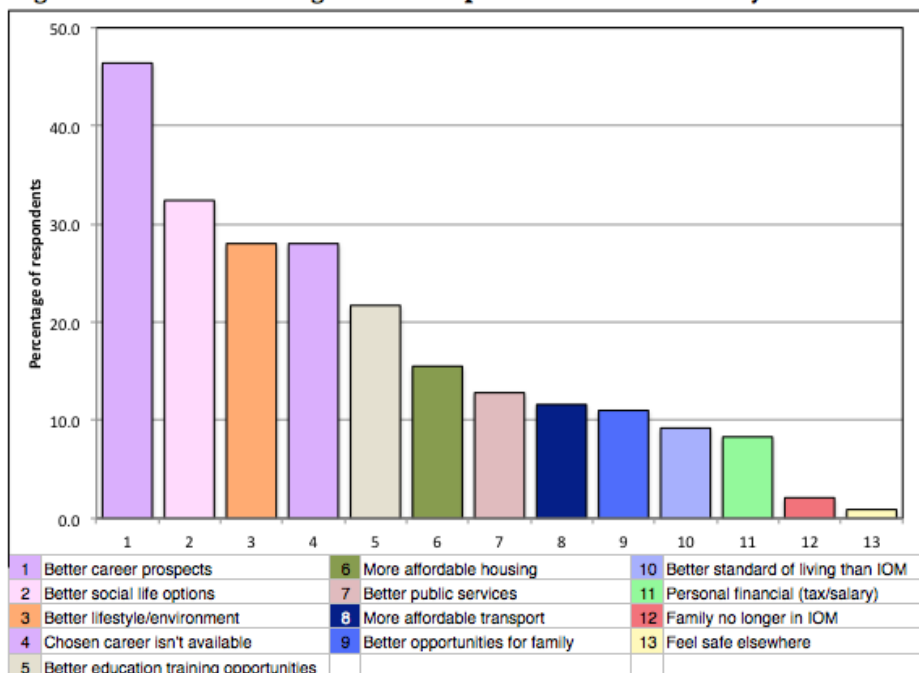
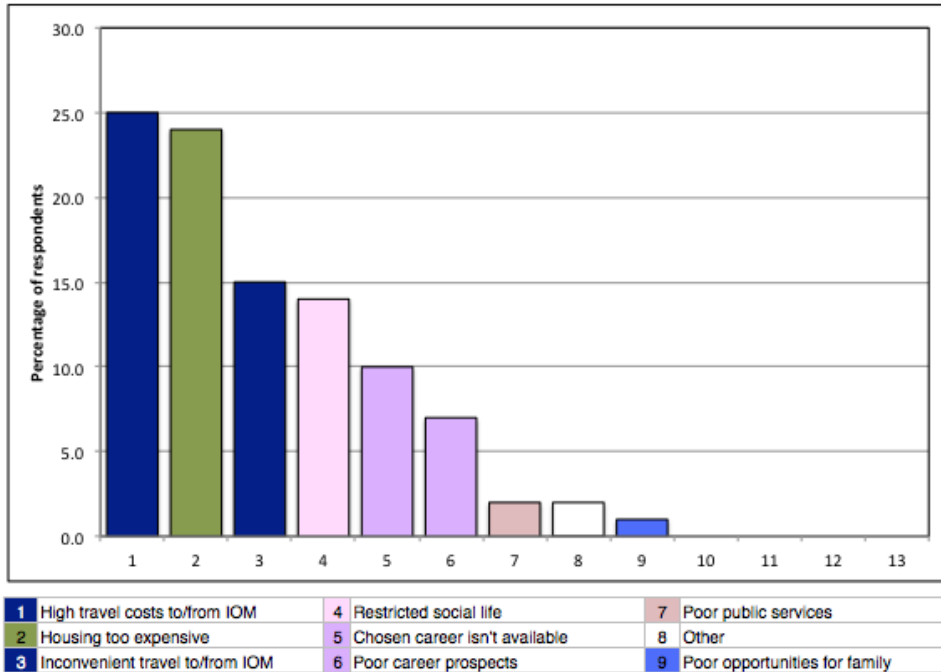
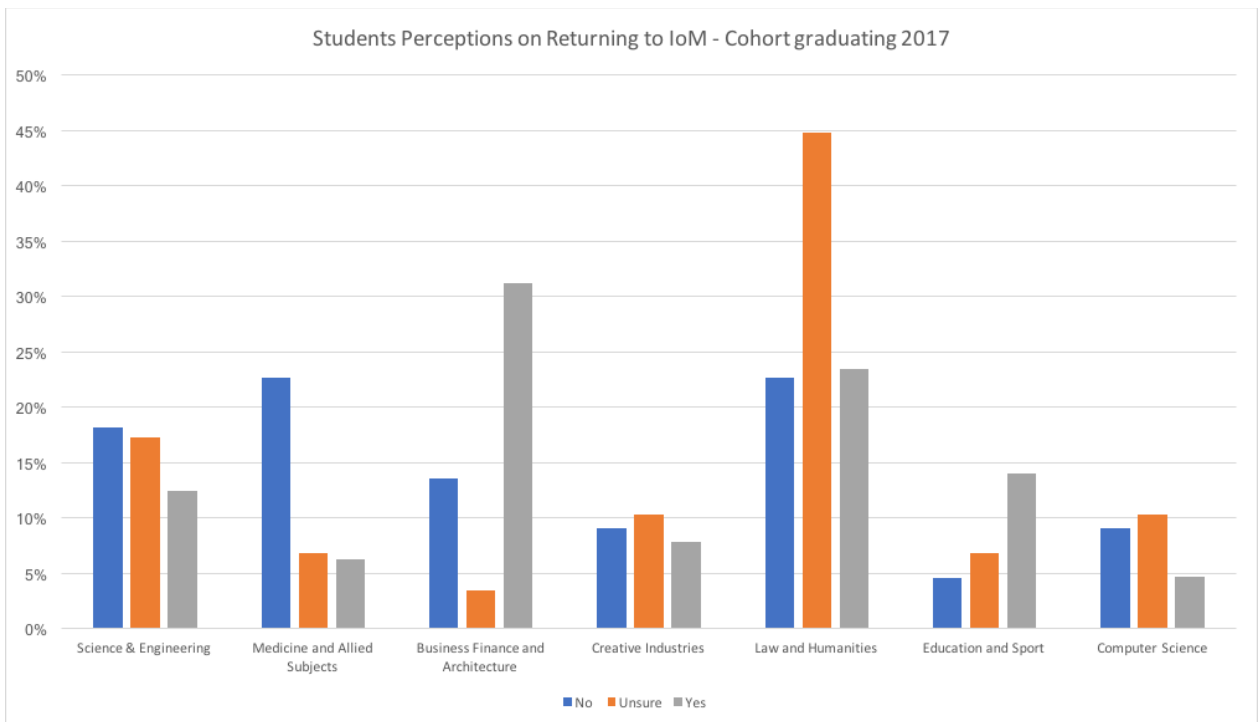


Figure 6: Disadvantages of living in the Isle of Man - 2004 Graduate Survey



3.4 Students studying *Business and Finance*, and *Education and Sport* degrees are more likely to return to the island; and students studying *Science and Engineering* and *Medicine and Allied Health* subjects are least likely to return to the island. *



The high number of graduates in business, finance and accounting degrees who return to the island reflects employment opportunities in this traditional sector. The relatively low number of computer science and IT graduates per se is surprising and warrants further exploration. That said almost 50% of undergraduates studying this subject do so at UCM and would not have had responded to the survey questions about intentions to return to the island thus making the low number who indicated an intention to return - less significant.

There are a high number of 'unsure' respondents in the humanities and law category. In the former it may be that humanities degrees offer fewer direct vocational pathways and so employment opportunities are less certain either on or off island.

On average 16 Manx residents commence law degrees study in the UK. The following comment is indicative of others made by law graduates in 2017; "I plan on returning to the island once I have gained enough experience working in London to be considered for a job on Island".

With regard to the medicine and allied subjects category, the Migrant Working Population by sector identified in the 2016 Isle of Man Census records that 34% of migrant workers were employed in the medical and health services. Further research is required to ascertain the reasons why graduates in this field mostly take up employment off island. The desire to gain a diversity of high quality professional experience after graduation will presumably be a factor across all subjects but perhaps particularly so in medical and allied services where there is an established and far reaching system of internships schemes. A 2017 graduate comment is instructive on this topic suggesting "more (on-island) funded post-graduate training in healthcare with a well-defined career advancement path"

**Due to the large range of subjects' studies by Manx students, subjects were groups initially based on the Higher Education Statistics Agency (HESA) subject coding (see APPENDIX 1)*

3.5 Four incentives account for 90% of responses made by 2017 survey respondents to "what one thing would encourage you to live and work on Isle of Man?"

Responses to this question were grouped into 6 main categories (see Table 1) and distinguished between the two 2017 survey cohorts.

The Tuition Fee contribution was introduced 2014/15 and those students who graduated in 2017 will be the first cohort to have graduated who were subject to this requirement. Of this cohort 21% cited that tuition fee relief would encourage them to return to the island. It should be noted this incentive was given as an example in the open text question which may have created bias.

Caution should be used if considering tuition fee relief in isolation, or indeed financial support based on housing or travel costs, as an incentive for Manx graduates to return the island. Not only would it be challenging to administer, but given the clear data relating to 'chosen career not available' and 'poor career opportunities' being primary reasons not to return (sec 3.3), such schemes may be ineffectual.

The three incentives that were consistent and instructive across both 2017 surveys were:-

- Further study opportunities on IOM
- More graduate recruitment schemes and internships
- More diverse careers available on IOM/knowing about career opportunities.

Table 1

What (one thing) could be improved to encourage graduates to return the IOM?		
Incentive Category	Responses <i>*some respondents suggested more than one 'thing'</i>	
	Cohort 1 n=107 2016/17	Cohort 2 n=137 2013/14 to 2015/16
1 Further study opportunities on IOM	11% (10)	13% (18)
2 More graduate recruitment schemes and internships	17% (19)	15% (21)
3 Financial		
a) Tuition Fee Relief	21% (23)	0
b) Affordable housing	7% (8)	9% (12)
c) Lower cost travel	5% (5)	6% (9)
4 Career Opportunities		
a) More diverse careers available on IOM	19% (20)	25% (34)
b) Knowing about career opportunities	9% (10)	9% (12)
5 Work Permits for Partners	3% (3)	1% (2)
6 Better Social Life	6% (6)	7% (10)

Interestingly 17% (31% for cohort 1) of graduates living off-island cited housing affordability as being a factor for not returning to IOM, yet only 7% suggested that making housing more affordable would be an incentive to return.

3.6 Net migration in 20-24 cohorts as reported in 2016 Isle of Man Census

None of the data collected in the Manx Graduate Survey contributes to an explanation for the net outward migration of 686 for the 20-24 year old cohort reported in the 2016 Isle of Man Census.

Indeed the Manx Graduate Survey data suggests that there has been no change in the number of graduates returning to island in comparison with 2004.

It is worth noting that the 2016 Census also showed that immigration in the 20-24 age group cohort was 261 compared to 509 in 2011. That 49%(248) decline of immigration in the 20-24 year age cohort provides a partial explanation for the overall decline in the number of 20-24 year olds living on island .

4. Conclusions

There is no evidence of a reduction in graduates who return or intend to return to the island in 2017 as compared to 2004.

The survey has provided valuable insights into factors that could encourage more graduates to return the Island. Incentives will vary according to age, personal circumstances and profession and further research will differentiate those factors. However there are clear and universal insights that can inform initiatives to increase the return of Manx graduates and potentially attract non Manx

graduates to migrate to the island also. This data is instructive with regard to UCM and OHR provision and for increased emphasis on working with employers in establishing graduate recruitment schemes and facilitating improved communication with Manx graduates about on-island opportunities.

There is no evidence that the introduction of the tuition fee contribution has to date influenced graduate decision making with regard to returning to the island.

There is an argument that there are greater benefits to be gained if graduates return to the island in their 30's and 40's when they have gained professional experience, are likely to have greater disposable income and families. Further research is needed in this area.

From the analysis of the data thus far, the following two strategies would both facilitate the clear desire for Manx graduates to return and strengthen their contribution to the Manx economy.

Work with government colleagues would be required to fund these strategies.

4.1 A graduate recruitment service

28% of both 2017 cohorts' graduates suggested '*improved IoM Graduate schemes*' or '*further study opportunities*' as potentially attractive incentives to encourage a return to IoM.

A graduate recruitment service could inform and facilitate the securing of jobs on island for Manx graduates. In addition it would provide a focus for working with employers in promoting graduate recruitment and establishing internships. A more active approach to graduate recruitment can be justified on the basis of this data, especially when considering employment sectors that are growing.

The service would be of value to both Manx graduates and others considering the Isle of Man as a place to live and work. And in the case of the former would unify the desire to return to the island with good graduate recruitments schemes and service (sec 3.1).

4.2 Increased and flexible provision of postgraduate and further study opportunities on island

Across both 2017 cohorts, 13% of graduates (59/452) went on to post-graduate studies and similarly a further 13% across both cohorts indicated '*further study opportunities*' on island as an incentive to return.

An increased offer in postgraduate qualifications and professional development opportunities through collaboration between UCM and OHR/Keeyll Darree and utilising blended/flexible delivery modes, may facilitate increased graduate return and attract non Manx graduates to growing and emerging sectors. It may also contribute to the lifelong learning agenda and to widen participation through supporting residents to develop new skill sets and change career.

Use of a work based learning framework would allow for the innovative 'learn and earn' internships and apprenticeships (see 4.1).

Student Award regulations and other sources of higher education funding would need to be revised to enable this provision.

5. Manx Graduate Survey – next steps

In 2018 additional research will be conducted including further analysis of the data from the 2017 Manx Graduate Survey and will include follow up consultation with respondents who agreed (90%).

Specific aspects to be researched include:-

- Deeper comparison with similar jurisdictions
- Factors influencing student’s choice to study at degree level on or off-island
- Efficacy of tuition fee contribution scheme
- Design of an annual Destination survey

References

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3. <https://guernseypress.com/news/2017/08/17/only-a-third-of-last-years-graduates-employed-locally/>
4. <https://www.hesa.ac.uk/support/documentation/jacs/hesa-codes>
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6. Manx Graduate Survey 2017 (DESC)

Acknowledgments - for their valuable support and assistance:-

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APPENDIX 1

Educational Type Grouping (ETG)	HESA coding embedded into ETG	HESA description of discipline
1 – Science and engineering	1,2,3,6,7	Biological, Veterinary, Mathematical & Physical sciences AND Engineering
2 – Medicine and allied disciplines	4, 15	Medicine & dentistry, also subjects allied to medicine
3 – Business, Finance; Architecture and planning	8, 13	Business, admin and architecture, building and planning
4 – Creative industries	9, 11	Creative arts & design; Mass communications & documentation
5 – Humanities & Law	10, 12, 16, 14	Social; law; historical and philosophical studies; languages
6 – Education & sports	17	Education
7 – Computer Science	18	Computer Science

