Introduction
2.7 million students are being educated outside their home countries, a 50% increase since 2000.

By 2025, almost 8 million students will be educated internationally.
Where Are They Going To?

Top Destination and Global Share of International Students

- U.S.: 22%
- U.K.: 14%
- France: 10%
- Germany: 10%
- Japan: 5%
- China: 6%
- Australia: 7%
- Canada: 3%
- All other countries: 23%

Source: UNESCO
International Education but not as we know it

Positives

- Huge economic growth in Asia – China, India & the Middle East
- Lack of higher education capacity in the developing world e.g. China & India
- Explosion of technology – jobs, modes of learning & communication needing a highly educated workforce
Challenges

- New destinations for international education e.g. Dubai & Malaysia
- Increasing competition for international students among English speaking and increasingly none English speaking countries e.g. Netherlands, Germany and even France
- Challenging environment for immigration & student movement
- Economic pressure leading to Governments withdrawing funding for education
- Aging population in US, Europe and Japan
What is i-graduate and the International Student Barometer?
The International Graduate Insight Group (i-graduate) is an independent benchmarking and research service, delivering comparative insights for the education sector worldwide: *your finger on the pulse of student and stakeholder opinion.*

i-graduate provides research services for:
- Over **250** education institutions worldwide
- **All** of the UK’s top 50 universities
- **4 of the top 5** universities in the world
The International Student Barometer™

The ISB is the largest annual study of international students in the world, with feedback from 350,000 international students since 2005.

Running in 11 countries across 5 continents: Australia, Belgium, Denmark, Germany, Ireland, the Netherlands, New Zealand, Singapore, South Africa, the UK and the USA.

Entry Wave 2007 ran in 91 institutions, taking feedback from over 67,000 international students.
Historically

In the old days education was like a funnel – from enquiry to graduation – a straightforward numbers game of conversion ratios.

Students just kept coming.

Graduates tumbled out at the bottom, no doubt enlightened and positive.

Strategic planning was largely limited to the positioning of the funnel - which markets to target.

The funnel & the wheel
Changing demographics

More discriminating

Inclined to complain

Much less loyal

The New Consumer of Education

Far more demanding

Much more sceptical

More experimental

More easily bored
The changing student

• **The student as:**
  – Investor
  – Journalist
  – Social networker
  – Outcome/work focused
  – With high expectations
  – Playing multiple roles
  – Increasingly unforgiving
  – Demanding satisfaction
  – Willing to be litigious
Current customers are core to the marketing and recruitment process, with opinions fed back to potential students at all stages. The ISB “takes the pulse” at two significant points in the academic year: Post-arrival and Year end.

Focus:
- **Post-arrival (Entry Wave)**: First impressions and orientation. Important elements include decision making, initial perceptions, experience of the enquiry to arrival process. Attitudes and aspirations are also key.
- **Year end (Exit Wave)**: Reflecting on the experience. Focus on the importance of elements of the education experience, degrees of satisfaction, recommendation ratios, attitudes and aspirations.
ISB Arrival 2008 – over 170 institutions

11 Universities, 2 Community Colleges and Private Colleges in the State of Ohio

28 Institutions in Singapore

30 Institutions in Germany

8 Institutions in the Netherlands

70 Institutions in the UK

7 Universities, 7 Polytechnics in New Zealand

8 Institutions in Australia
Methodology
How does the ISB work?

- Semi-standardised online questionnaire format, adapted and customised for each partner institution
- Email alert sent to students who click a hyperlink to access the questionnaire
- i-graduate Research Team manage and monitor all data collection and analysis
- Confidential reporting
- Benchmarked data
Many of the Questions in the ISB survey are asked on a four point scale. The Answers to each question are averaged to obtain one value that you will see in our presentation. Here is an example of the process:

### Data Collection

<table>
<thead>
<tr>
<th></th>
<th>Personal safety</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student A</td>
<td>4</td>
</tr>
<tr>
<td>Student B</td>
<td>3</td>
</tr>
<tr>
<td>Student C</td>
<td>4</td>
</tr>
<tr>
<td>Student D</td>
<td>2</td>
</tr>
<tr>
<td>Student E</td>
<td>3</td>
</tr>
</tbody>
</table>

### Calculations

\[
\frac{4+3+4+2+3}{5} = 3.2
\]

### The Results

- **Personal safety**
  - University (5)
  - Number who answered the question
Contents

ISB Autumn 2007

Response

Pre- Arrival

Choice of destination

Application

University Experience

Arrival

Learning

Living

Support

Learning Styles ™

Recommendation

Conclusion
Response
### Response

**Where are you from?**

<table>
<thead>
<tr>
<th>Nationality</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>262</td>
</tr>
<tr>
<td>China</td>
<td>154</td>
</tr>
<tr>
<td>Korea, South</td>
<td>27</td>
</tr>
<tr>
<td>Taiwan</td>
<td>16</td>
</tr>
<tr>
<td>Turkey</td>
<td>14</td>
</tr>
<tr>
<td>Germany</td>
<td>12</td>
</tr>
<tr>
<td>Canada</td>
<td>12</td>
</tr>
<tr>
<td>Sri Lanka</td>
<td>8</td>
</tr>
<tr>
<td>Romania</td>
<td>8</td>
</tr>
<tr>
<td>Other</td>
<td>138</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>651</strong></td>
</tr>
</tbody>
</table>

**UC (651, inner circle) & USA (2561, outer circle)**

- **India**: 40%
- **China**: 24%
- **Korea, South**: 4%
- **Taiwan**: 2%
- **Turkey**: 2%
- **Germany**: 2%
- **Other**: 26%

- **USA**:
  - **India**: 40%
  - **China**: 24%
  - **Korea, South**: 4%
  - **Taiwan**: 2%
  - **Turkey**: 2%
  - **Germany**: 2%
  - **Other**: 26%
  - **UC (651)**
  - **USA (2561)**
What School / Faculty are you in?

UC (626)

- Engineering: 42%
- Arts and Sciences: 20%
- Business: 11%
- Design, Architecture, Art, and Planning: 8%
- College-Conservatory of Music: 5%
- Medicine: 5%
- Other: 9%
Decision Making
Choice of Destination

**Was this country your first choice for international education?**

- **Yes**: 95%
- **No**: 5%

**Which other countries did you consider?**

- **England**: 47%
- **Canada**: 34%
- **Germany**: 32%
- **Australia**: 27%
- **France**: 17%
- **Singapore**: 16%
- **other EU**: 8%
- **The Netherlands**: 7%
- **China**: 7%
- **Other**: 6%
- **New Zealand**: 5%
- **Spain**: 3%
- **Scotland**: 2%
- **South Korea**: 1%
- **Malaysia**: 1%
- **Ireland**: 1%

UC (231)
How important were the following factors when deciding to study at this university?

<table>
<thead>
<tr>
<th>Factor</th>
<th>UC (274)</th>
<th>ISB (35640)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching quality</td>
<td>3.6</td>
<td>3.9</td>
</tr>
<tr>
<td>Scholarship</td>
<td>3.4</td>
<td>3.8</td>
</tr>
<tr>
<td>Reputation</td>
<td>3.2</td>
<td>3.4</td>
</tr>
<tr>
<td>Research quality</td>
<td>3.2</td>
<td>3.4</td>
</tr>
<tr>
<td>Department reputation</td>
<td>3.1</td>
<td>3.3</td>
</tr>
<tr>
<td>Cost of study</td>
<td>3.1</td>
<td>3.3</td>
</tr>
<tr>
<td>Institution reputation</td>
<td>3.1</td>
<td>3.3</td>
</tr>
<tr>
<td>Personal safety</td>
<td>3.1</td>
<td>3.3</td>
</tr>
<tr>
<td>Country</td>
<td>3.0</td>
<td>3.2</td>
</tr>
<tr>
<td>Teacher reputation</td>
<td>3.0</td>
<td>3.2</td>
</tr>
<tr>
<td>Work opportunities</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Course length</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Specific program</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Long-term employment</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Recommendation</td>
<td>2.9</td>
<td>3.1</td>
</tr>
<tr>
<td>Social life</td>
<td>2.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Location</td>
<td>2.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Social atmosphere</td>
<td>2.8</td>
<td>3.0</td>
</tr>
<tr>
<td>Friends here</td>
<td>2.6</td>
<td>2.9</td>
</tr>
</tbody>
</table>
Which of the following factors helped you to choose your institution?

- Friends
- University website
- Current students
- Parents
- Ranking tables
- Teacher/tutor
- Alumni
- Prospectus
- Independent website
- University visit
- Overseas rep
- Staff at a presentation
- Staff at an exhibition/fair
- Press article
- Careers adviser
- Employer
- Press advertisement
- Sponsor
- Government advisory service
- Directory or guide

Sorted by Institution

UC (226) ISB (35075)
Please rate the service you received from the agent / representative office?

- Very poor: 0% UC (8), 0% USA (18)
- Poor: 13% UC (8), 17% USA (18)
- Good: 50% UC (8), 56% USA (18)
- Very good: 38% UC (8), 28% USA (18)

Did you pay for the services of the agent / representative office?

- UC (8): 88%
- USA (18): 50%
Arrival
Please rate the following regarding when you first arrived at the university?

1. Email / Internet
2. Formal welcome
3. University Orientation
4. Bank account
5. Meeting staff
6. Academic registration
7. Study sense
8. First night
9. Home friends
10. Social activities
11. Welcome
12. Local Orientation
13. Finance/bursars office
14. Housing office
15. Other friends
16. Host friends

Sorted by institution satisfaction

1: Very poor 4: Very good
Learning
How important are the following at this stage in the year?

- Expert lecturers
- Employability
- Course of study of study content
- Good teachers
- Library
- Technology
- Research
- Work experience
- Assessment
- Long-term employment
- Learning support
- Flexibility
- Performance feedback
- Academics’ English
- Learning spaces
- Language support
- Multicultural
- Opportunities to teach

1: Very unimportant  4: Very important

Sorted by Institution Importance
Please say how satisfied you are at this stage of the year with the following?

<table>
<thead>
<tr>
<th>Category</th>
<th>UC (575)</th>
<th>ISB (53162)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expert lecturers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course of study content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good teachers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Long-term employment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexibility</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performance feedback</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Academics' English</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning spaces</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multicultural</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities to teach</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1: Very dissatisfied  4: Very satisfied
Living
Please say how **satisfied** you are at this stage of the year with the following?

- Internet access
- Financial support
- Safety
- Good medical care
- Accommodation cost
- Living cost
- Good contacts
- Visa advice
- Earning money
- Transportation links
- American English
- Sports facilities
- Good place to be
- Host culture
- Host friends
- Transportation links (uni locations)
- Other friends
- Social facilities
- Social activities
- Similar friends
- Worship facilities

**1: Very dissatisfied**  **4: Very satisfied**

Sorted by Institution Importance
Living satisfaction – Autumn 2007 vs. Autumn 2006

- Transport links
- Worship facilities
- Sports facilities
- Good place to be
- Similar friends
- Social activities
- Visa advice
- Host culture
- Social facilities
- Other friends
- Accommodation cost
- Good contacts
- Financial support
- Safety
- Host friends
- Living cost
- Earning money
- Internet access

Better in Autumn 2006
Better in Autumn 2007

UC ISB
Living

- (348) Private rented house/apartment/room
- (164) University halls of residence (dorm)
- (496) West campus
- (43) East campus (medicine, nursing, pharmacy)

Matrix

- Very Dissatisfied
- Dissatisfied
- Satisfied
- Very Satisfied

Accomm. quality
- Accomm. cost
- Living cost
- Safety
- Home friends
- Host friends
- Other friends
- Host culture
- Sports facilities
- Social facilities
- Social activities
- Internet access
- Good contacts
- Worship facilities
- Good place to be
- Transport links (other places)
- Financial support
- Earning money
- Visa advice
- Transport links (uni locations)
Support
Please say how **satisfied** you are at this stage of the year with the following?

1: Very dissatisfied  
2: Dissatisfied  
3: Neutral  
4: Satisfied  
5: Very satisfied

Sorted by Institution

- UC (532)
- ISB (39187)
Support satisfaction – Autumn 2007 vs. Autumn 2006

--- | ---
Faculty advisor | |
Campus eating places | |
Student health center | |
Housing office | |
Graduate School | |
Finance office | |
Un Int. services staff | |
Student organizations | |
Faith Provision | |
IT Support | |
Career development | |
Counseling | |

UC ISB

Autumn 2007 vs. Autumn 2006

Better in Autumn 2007
Recommendation
## Recommendation

<table>
<thead>
<tr>
<th>UC (567)</th>
<th>ISB (52822)</th>
</tr>
</thead>
<tbody>
<tr>
<td>34% Will actively encourage people to apply</td>
<td>38%</td>
</tr>
<tr>
<td>46% If asked, will encourage people to apply</td>
<td>46%</td>
</tr>
<tr>
<td>16% Will neither encourage nor discourage others</td>
<td>13%</td>
</tr>
<tr>
<td>2% If asked, will not encourage people to apply</td>
<td>2%</td>
</tr>
<tr>
<td>1% Would actively discourage others from applying</td>
<td>1%</td>
</tr>
</tbody>
</table>
How does the ISB Work?
Field Period

• The ISB is an online instrument
• A email is sent to students by their institution with a web-link to the online survey
• The field period is from mid October to mid December
• The survey for each institution usually stays online for 4 to 6 weeks
Request to Participate

- Have the request to participate come from Chief International Officer.
- Follow up once a week while the wave is available.
- Offer incentives to participate (UC offers $1,200 in incentives).
What to do with Results

• Make sure results are shared with students (link on web site)
• Make sure results are shared with administration (Faculty Senate; Council of Deans, etc.)
• Use results for press releases
Implement Changes Based on the Results

• It’s important that students know that the outcomes will result in positive changes.

Some examples from UC include:
Our Investment

• Now we expanded our on-campus shuttle services to take students to off campus locations.
Our Investment Con’t.

- We have partnered with the metro, our public transportation system, to provide students with FREE transportation in and around Cincinnati.
24 Hour Study/Computer Center

- 100 computers (60 Windows PCs and 40 Macintosh computers)
- Wireless access throughout the facility
- 24/7 lab assistance
- Four group study rooms, two with SMART Boards, an interactive, electronic copy-board which converts white board notes to a real-time electronic file
- A quiet study room
- A security officer on-site when the library closes
UC’s 24 Hour Study/Computer Center
Our Investment Con’t

- Our students were dissatisfied with our faith facilities so we now we have a dedicated room on campus that can be used for prayers and personal meditation.
You are not alone

Guidance from our Experienced Client Relations Team

Jenni Parsons – Director of Client Relations
Kirsty Bryant – Client Relations Manager
Lizi Milne – Client Relations Manager

Jenni, Kirsty and Lizi have extensive experience working with universities in over 15 countries, over numerous time zones

ISB Guide – How to run the ISB?

Templates for posters and promotional material
Initial consultation - We will work with you to ensure an appropriate fit and to agree the process for the institutions in Ohio

Prizes & incentives - We will advise you on how to maximize on response from your student cohort

Survey design and coding - We deal with all design and technical aspects, including coding of questionnaires

Response monitoring - i-graduate manages and monitors all data collection

Reminders - We provide recommended text for reminder emails

Data collection - Data collection is online
Financials
## Cost of the ISB

<table>
<thead>
<tr>
<th>Size of Institution</th>
<th>Cost if Individual Institution Level Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 500 International Students</td>
<td>£2200/$4000</td>
</tr>
<tr>
<td>500 + International Students</td>
<td>£4400/$8000</td>
</tr>
</tbody>
</table>
## State Investment

<table>
<thead>
<tr>
<th>ISB membership</th>
<th>Cost in US $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrival wave with central report for 13 State higher education institutions in the State of Ohio</td>
<td>$49,950</td>
</tr>
</tbody>
</table>
## State Institutions

<table>
<thead>
<tr>
<th>Size of Institution</th>
<th>Cost if Individual Institution Level Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 500 International Students</td>
<td>$2000</td>
</tr>
<tr>
<td>500 – 1000 International Students</td>
<td>$3000</td>
</tr>
<tr>
<td>Over 1001 International Students</td>
<td>$3500</td>
</tr>
</tbody>
</table>
### Private Institutions

<table>
<thead>
<tr>
<th>Size of Institution</th>
<th>Cost if Individual Institution Level Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 500 International Students</td>
<td>$3000</td>
</tr>
<tr>
<td>500 – 1000 International Students</td>
<td>$4000</td>
</tr>
<tr>
<td>Over 1001 International Students</td>
<td>$4500</td>
</tr>
</tbody>
</table>
Your finger on the pulse of international student opinion

Deliverables
Analysis for your institution, by nationality level of study and subject

- Bespoke PowerPoint report
- Anonymous searchable open comments for your institution
- Summary Rankings Sheet – comparing your institutions to Ohio and the rest of the world
- Summary Rankings Grid – comparing your institution to the other institutions in Ohio
- All data loaded onto a private online Filestore - for downloading
<table>
<thead>
<tr>
<th></th>
<th>Nationality</th>
<th>Learning Comment</th>
<th>Living Comment</th>
<th>Support Comment</th>
<th>Arrival Comment</th>
<th>Experience of Communication</th>
<th>Recommendation</th>
<th>Rec Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>The academic atmosphere is very good.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>the facilities here are excellent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>The high level of academic research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>China</td>
<td>The learning system is very good for me from now. I have to say it is very exciting for me to have the opportunity to study in UC. Although it is tough, I would like it.</td>
<td></td>
<td></td>
<td></td>
<td>My arrival is in mid-night, while they still waited there for me to send me to my temporary housing place. It is very sweet.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td>UC should offer temporary housing for free for new students for ten days. And let me find their living place</td>
<td>Give some directions on what to do during the first few days! Such as how to get</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>China</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Good place! You can really learn here</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Very good experience in UC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>great place, modern sports facilities, innovative and forward-thinking staff, loads of bursaries around to help</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Example of a Ranking Sheet

**www.i-graduate.org**

#### ISB Ranking Sheet - Autumn 2007

<table>
<thead>
<tr>
<th>Base</th>
<th>ISB %</th>
<th>RGI %</th>
<th>ISB +/-</th>
<th>RGI +/-</th>
<th>% p</th>
<th>ISB</th>
<th>RGI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Overall</td>
<td>85.7%</td>
<td>81.1%</td>
<td>4.2%</td>
<td>3.8%</td>
<td>1.8%</td>
<td>8</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expert lecturers</td>
<td>90.3%</td>
<td>89.5%</td>
<td>4.5%</td>
<td>3.6%</td>
<td>1.0%</td>
<td>0.03</td>
<td>14</td>
</tr>
<tr>
<td>* Academics’ English</td>
<td>90.8%</td>
<td>88.6%</td>
<td>2.2%</td>
<td>2.8%</td>
<td>0.01</td>
<td>30</td>
<td>4</td>
</tr>
<tr>
<td>Library</td>
<td>92.5%</td>
<td>85.2%</td>
<td>6.3%</td>
<td>7.2%</td>
<td>0.00</td>
<td>10</td>
<td>1</td>
</tr>
<tr>
<td>* Good teachers</td>
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**Ranking based on mean scores**

*83/18*
### Example of a Rankings Grid

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Ability to download your data from a secure filestore

A member of the i-graduate Research Team will be in contact with details of your institution’s online password-protected Filestore (www.i-graduate.org/filestore)

Filestore contains: full PowerPoint presentation, open comments spreadsheet, pivot tables, ranking grids and ranking sheets for Entry Wave 2007.
Report Launch
Making the most of the Ohio data

Share your data – “A problem shared is a problem halved!”
Example: New Zealand

Coming together to discuss the Barometer experience

Sharing “Best Practice” with others to promote internationalisation

What are your institution’s priority areas?
In which areas can your institution share Best Practice?
Launching the report - Ideas

🌍 Living data that is actionable

🌍 Bringing the OBR and schools together for an all Ohio Launch

🌍 Offering workshops where schools can discuss their experiences

🌍 Creating action plans for the State and individual schools as a result of the International Student Barometer
Examples of sharing Best Practice

The International Student Barometer™ is used to:

- Inform departmental and institutional decision-making
- Identify priority areas for investment or support

Best Practice Exchange 2008 - held on 7th March at the University of Edinburgh

The event was attended by over 105 delegates from 65 institutions and other organisations.

For more information please visit: www.i-graduate.org/events
Future Developments
Future Developments

More schools taking part in Ohio as international students numbers grow

An end of year survey to understand retention of students, their plans after study and future education and career options

Opportunities to take part in other international projects e.g. looking at the experience of International Alumni

Other US State Systems: California, Texas, New York, Michigan and more

Barometers for other countries: Canada, Ireland, Spain, France, Finland, Malaysia and Thailand
Question and Answer
Thank you!

For questions or further details on this project of any of our other research services, please contact Louise Wringe
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