



SERVICES FOR INTERNATIONAL EDUCATION MARKETING

Market Briefing

Education UK Exhibition

March 2015

www.britishcouncil.org/siem

Background Information

- Growing number of students studying overseas
- Indonesian's English Proficiency is improving
- Indonesians' perceptions of the UK
- Strong competition with other study destinations
- Recent changes on the new government
- Engaging with Agents is part of the culture
- British Council Trained Education Agents : <http://www.bcagent.info/gal/>

External Environment

- Changes in the new government
- Separation of Higher Education from Basic Education
- The new Ministry for Research Technology and Higher Education
- Strategic Plan of the new Ministry for Research Technology and Higher Education:
 - ❖ Quality
 - ❖ Relevance
 - ❖ Access
 - ❖ Competitiveness
 - ❖ Governance

External Environment (Continued)

- The new minister's push for down streaming and commercialization of research and improved Higher Education – Industry link
- Priority areas for research :
Energy, Agriculture, Health, Maritime, Food Security, Infrastructure, Energy, Shipping, Future Cities, Design Technology
- Religious Education (Basic and Higher Education) is still under the Ministry of Religious Affairs
- 53 States Universities and over 630 private Islamic Higher Education Institutions
- New scholarships for PhDs in Islamic Subjects
(<http://scholarships.kemenag.go.id/>)

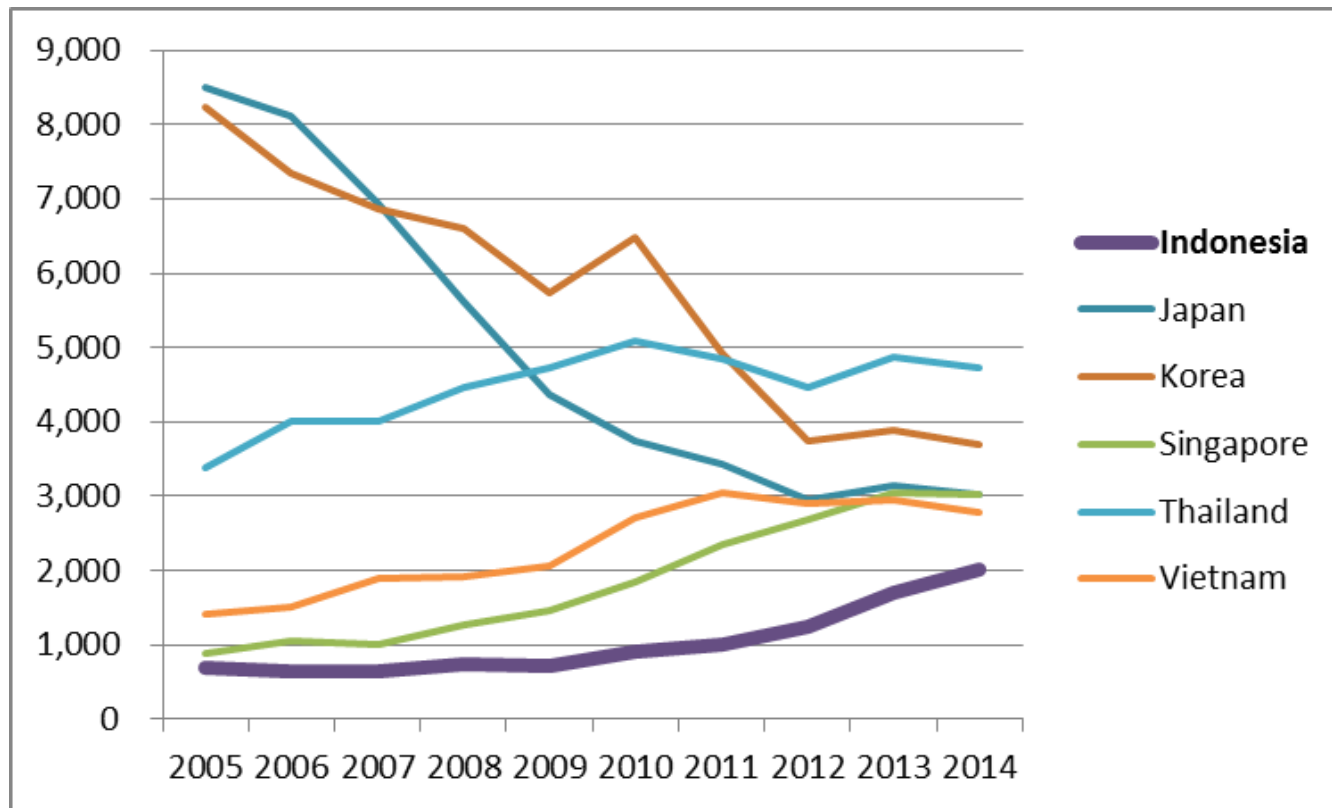
External Environment (Continued)

Updates for the Elementary and Secondary Education:

- International school changes name
- The Education and Culture ministry is aiming to build 200 vocational schools this year

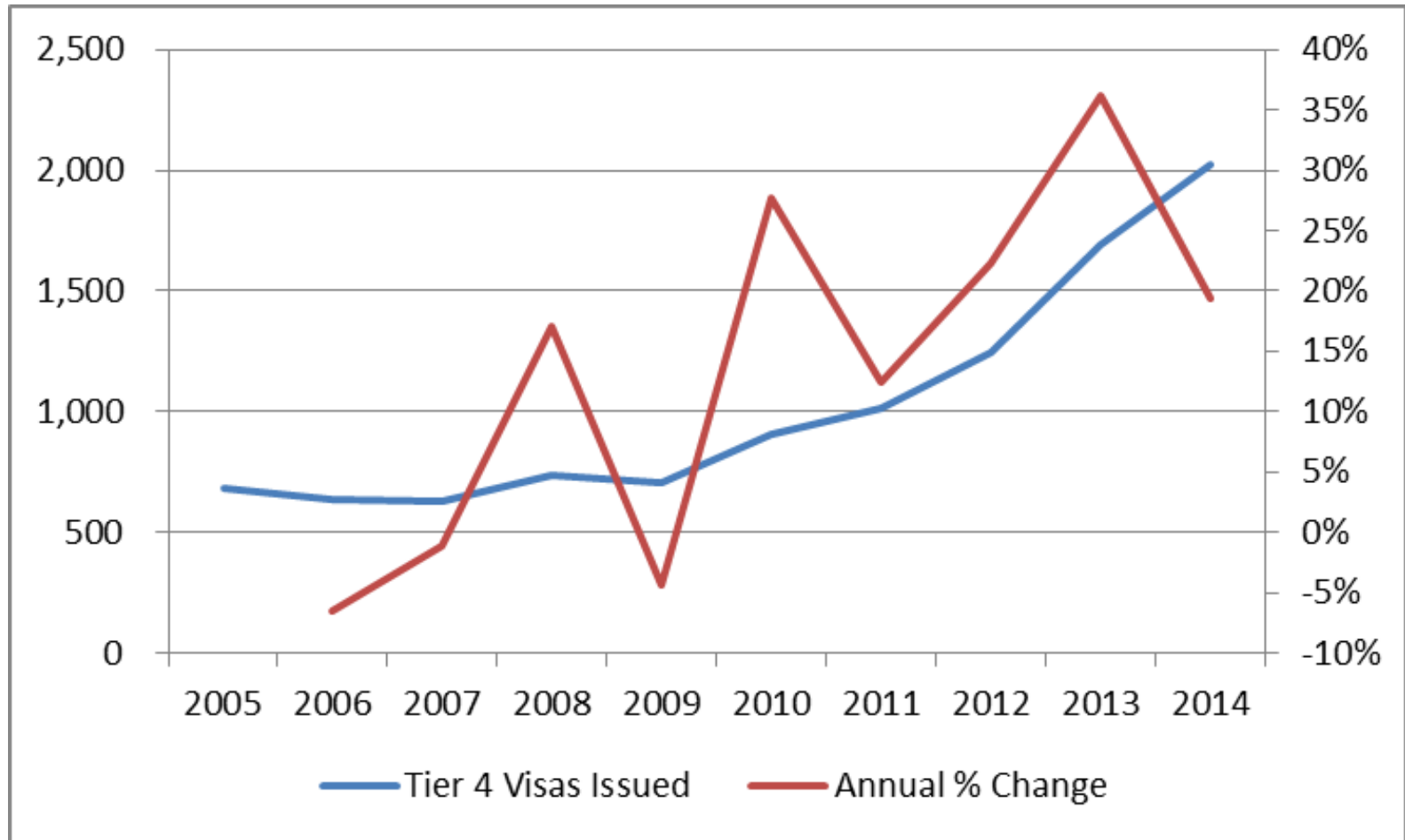
Relative Market Size for the UK by Tier 4 Visa Issuance

- Indonesia vs. selected East Asia markets



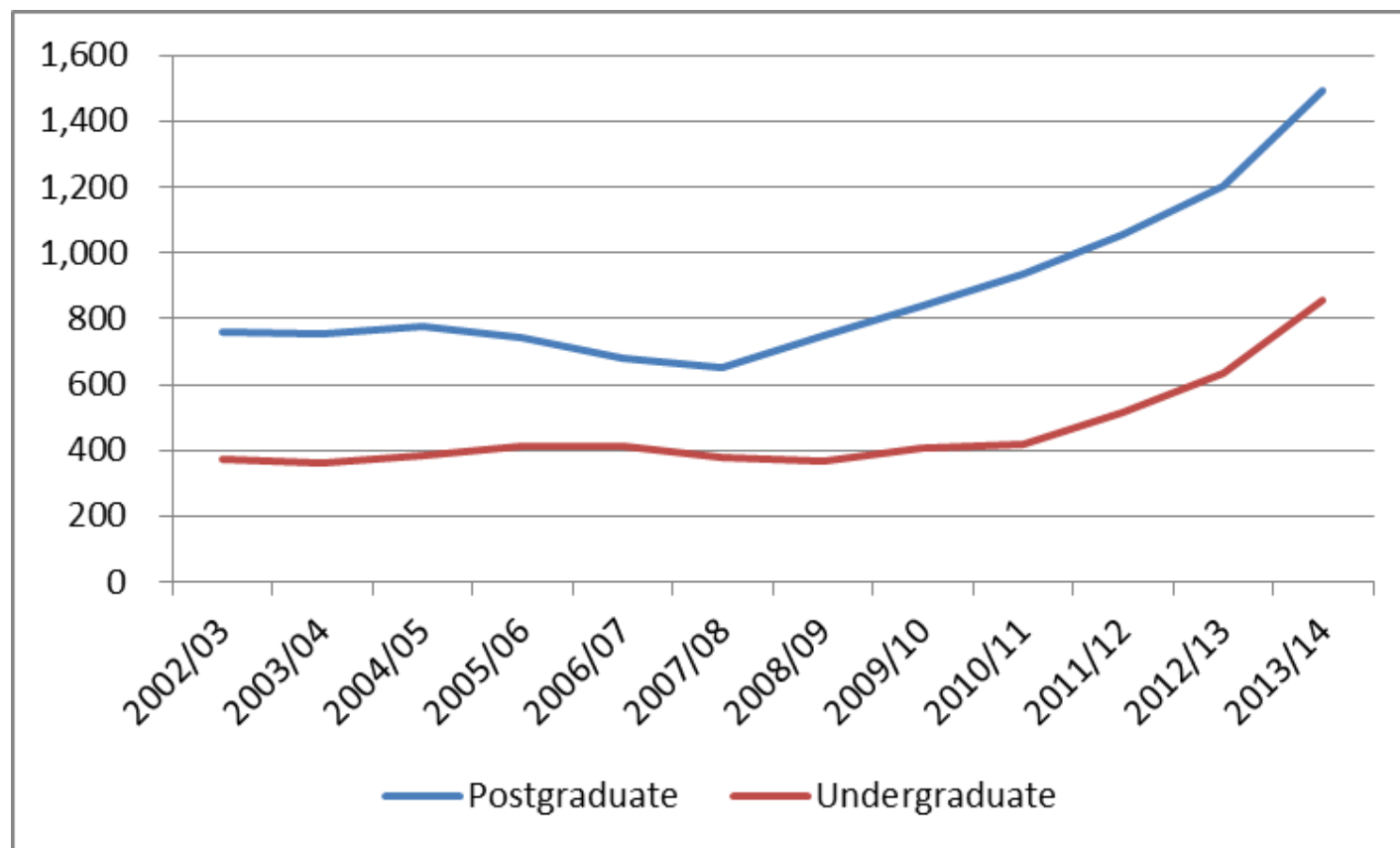
Source: Home Office via www.gov.uk

Tier 4 Visa Issuance to Indonesian students



Source: Home Office via www.gov.uk

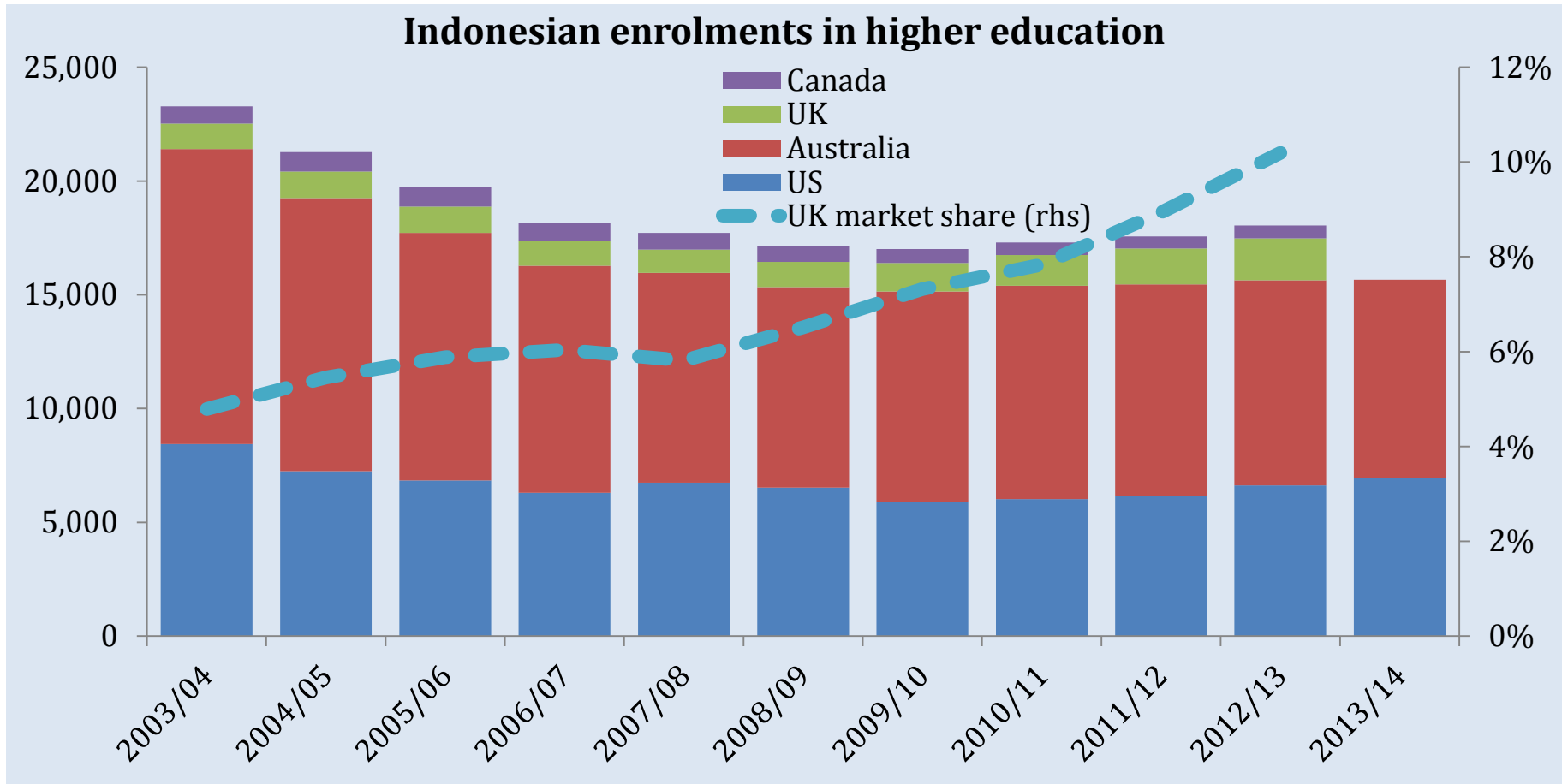
Indonesian students in UK: Higher Education



Source: HESA

UK vs. main competitor destinations

- ❖ UK higher education has steadily won greater market share of Indonesian students.
- ❖ Based on UK study visa issuance, this trend is likely to continue until at least 2015.



Source: CIC, HESA, AEI, IIE; data refers to total enrolments in higher education.

Factors driving the Growth of Indonesian Students in the UK

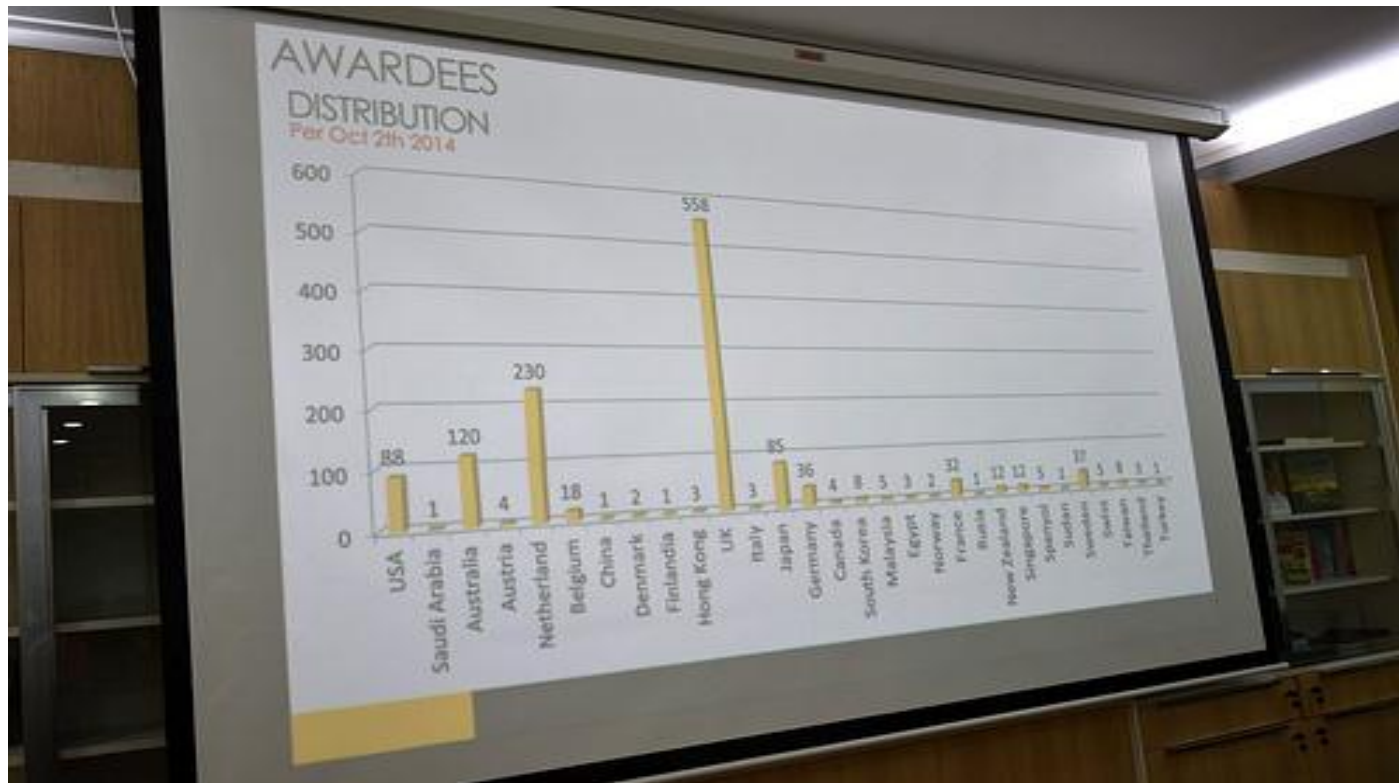
- Improved price competitiveness with Australia
- Students and Parents increasing awareness of the length of study in the UK for postgraduate study
- Word of mouth marketing from the alumni network
- More available scholarships opportunities:
 - **LPDP Scholarships** (Will be discussed further in the next slides)
 - **DIKTI PhD Scholarships**
 - **Chevening Scholarships** : The number of Chevening scholarships is tripled for next year (22 scholarships → 70 scholarships)
 - **Ministry Scholarships** : SPIRIT scholarships Bappenas, MoRa Scholarships

LPDP (Indonesia Endowment Fund for Education) Scholarships

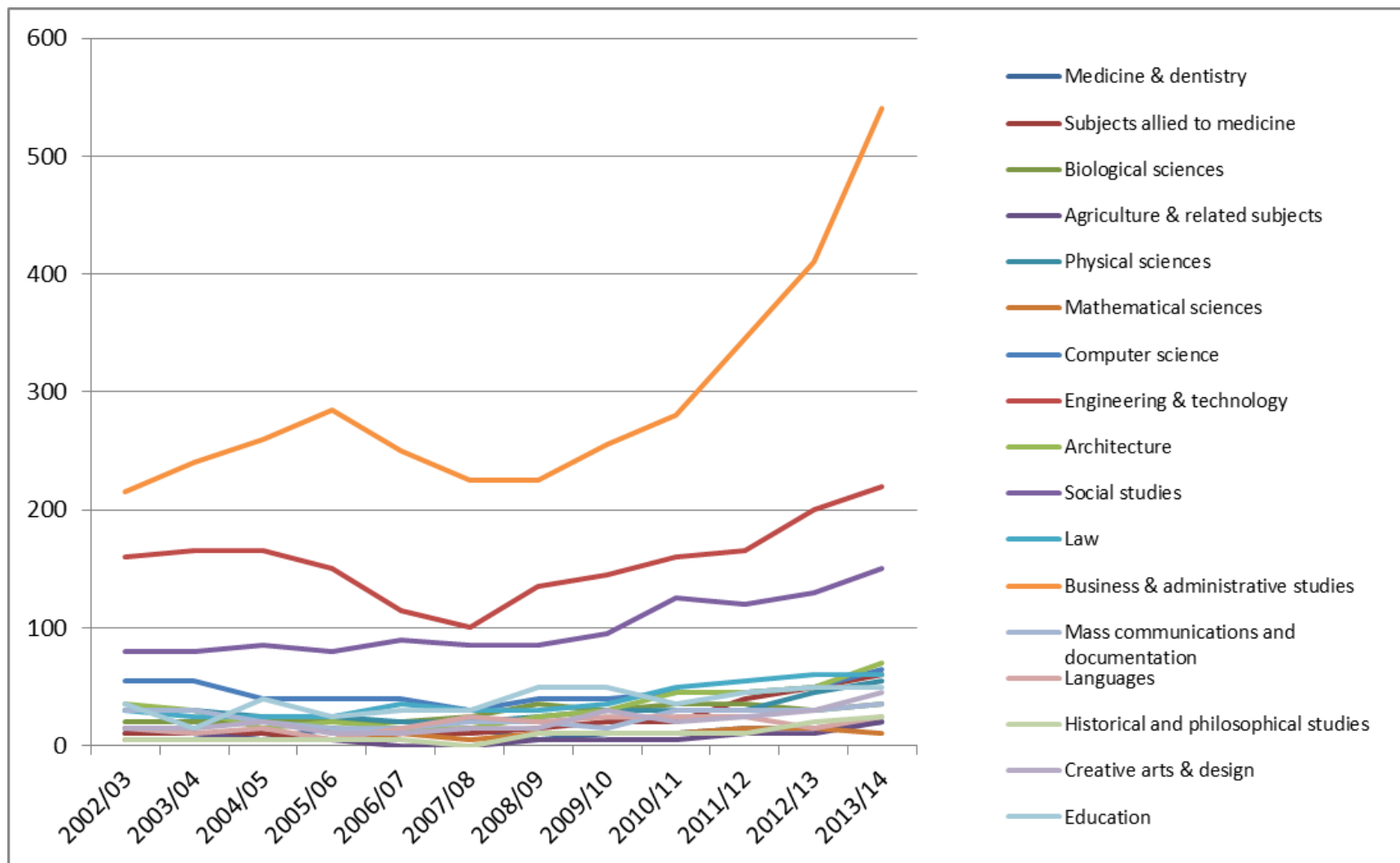
- Currently owned by 4 ministries: Ministry of Finance, Ministry of Education, Ministry of Research Technology and Higher Education and Ministry of Education and Culture.
- With the new government, DIKTI PhD Scholarships is now being managed by LPDP
- LPDP Focus Priority Areas:
Economy, Islamic Finance, Education Management, Environmental studies, Creative Industry, Nursing, International Business Law, Health and Medicine Technology, Information Technology and Communication, maritime, Food Security, Energy & Renewable, Transportation Technology, Fishery, Agriculture and Food Security
- Selection period: February, May, August, November
- In January 2015, LPDP was awarded by Indonesia World Records Museum for sending the most students overseas since 2013 (more than 4500)

LPDP (Indonesia Endowment Fund for Education) Scholarships

UK is the most popular destination for LPDP Scholarships
Top 3 destinations are : 1) UK 2) Netherlands 3) Australia

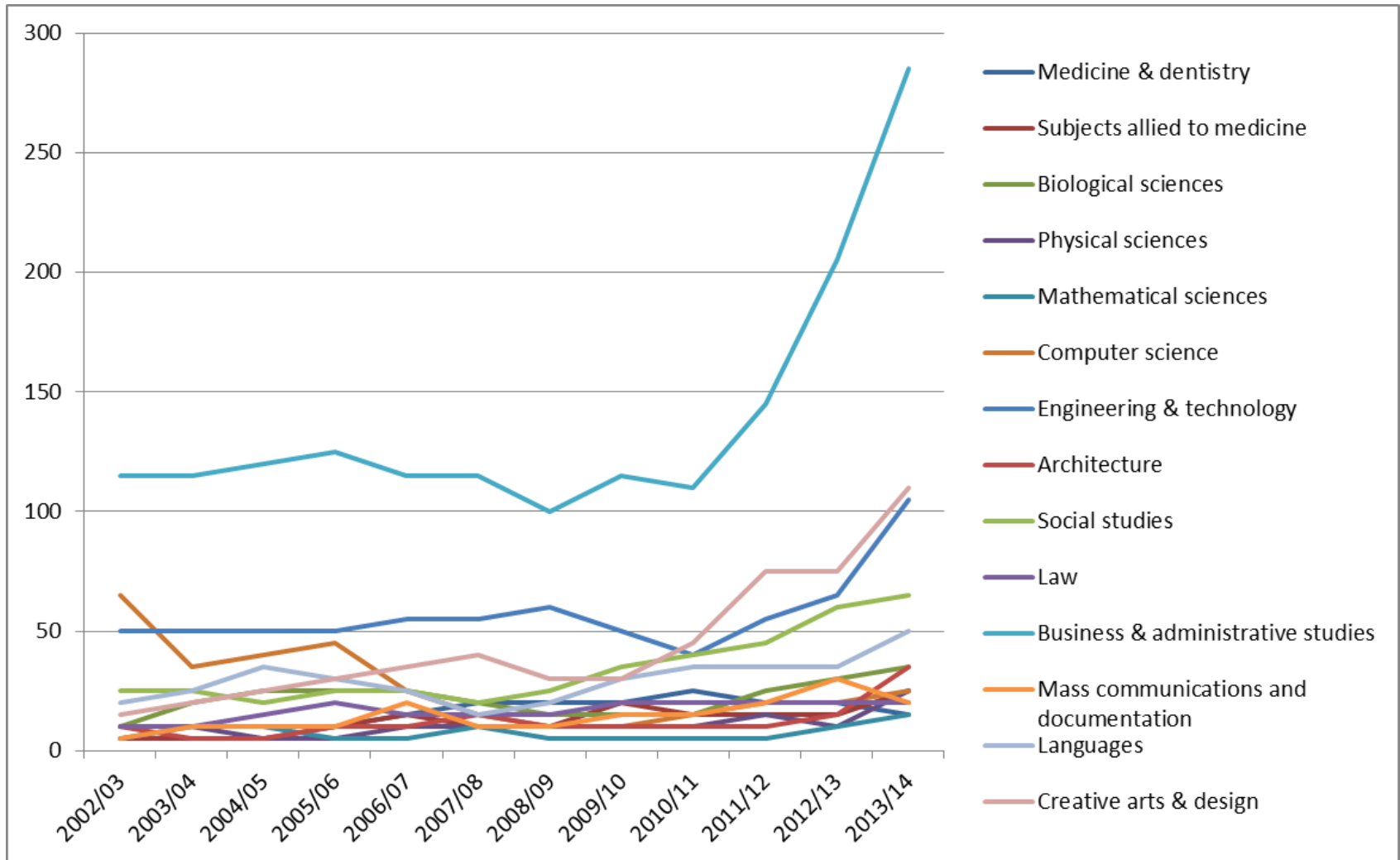


Indonesian student enrolment in UK: PG



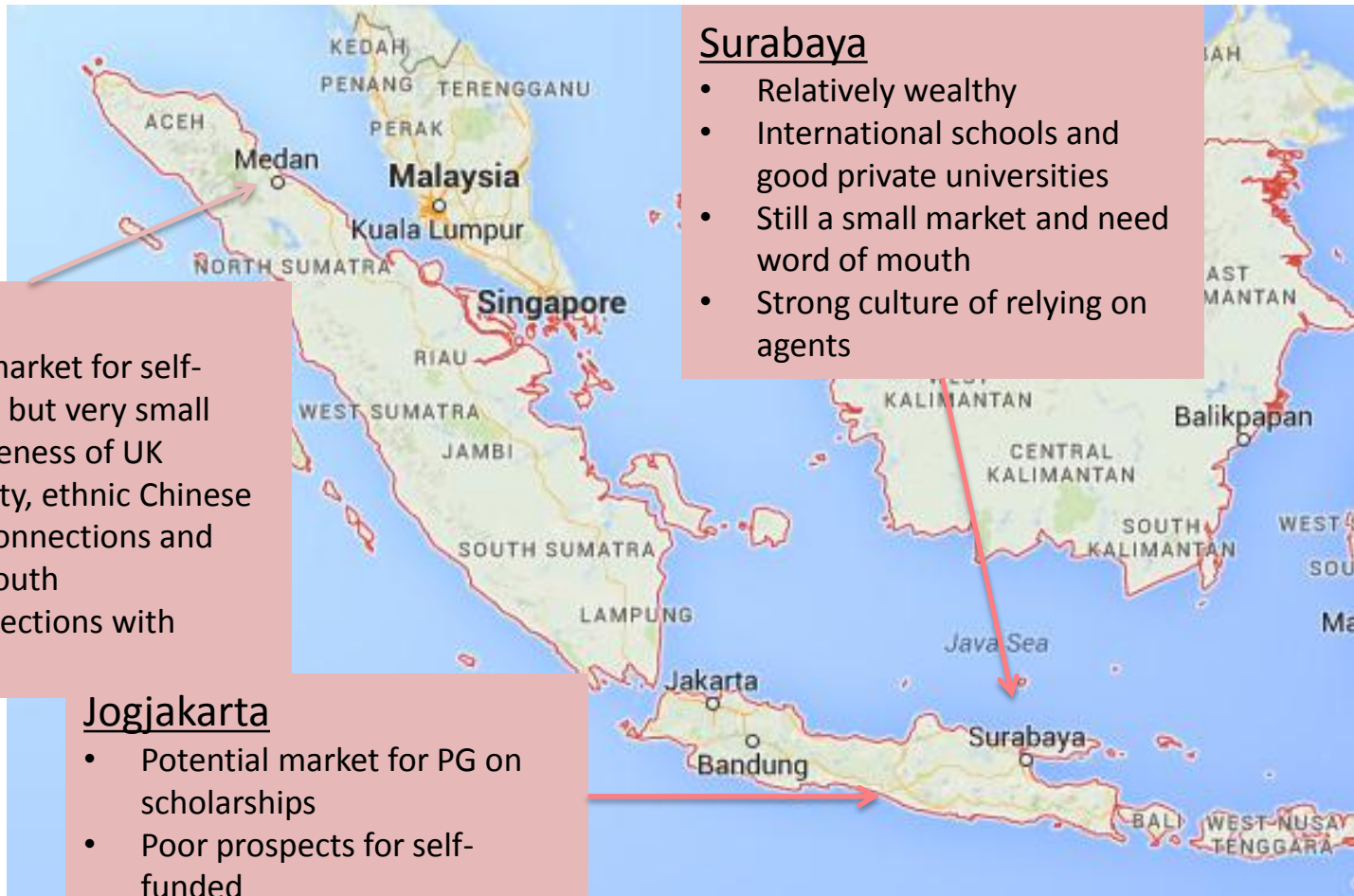
Source: HESA

Indonesian student enrolment in UK: UG



Source: HESA

Markets within Indonesia



Medan

- Potential market for self-funded UG but very small
- Little awareness of UK
- Business city, ethnic Chinese
- Requires connections and word of mouth
- Close connections with Penang

Jogjakarta

- Potential market for PG on scholarships
- Poor prospects for self-funded

Surabaya

- Relatively wealthy
- International schools and good private universities
- Still a small market and need word of mouth
- Strong culture of relying on agents

Students Top Motivation to study in the UK

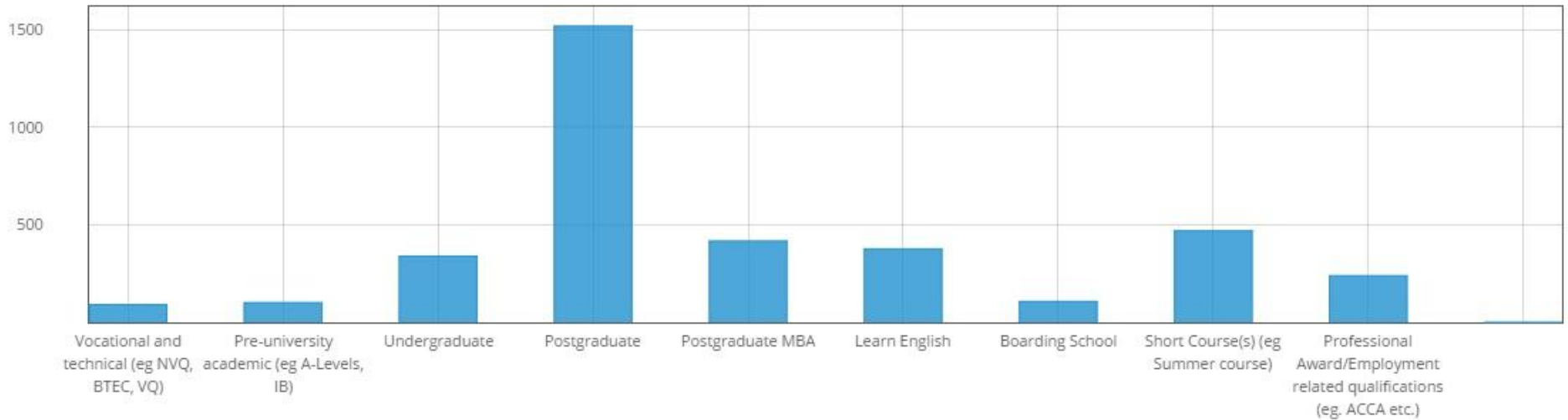
1. High Academic Standard
2. Environment
3. Scholarships offered
4. Travelling to many different countries
5. International Recognition

Appealing to the Indonesian audience

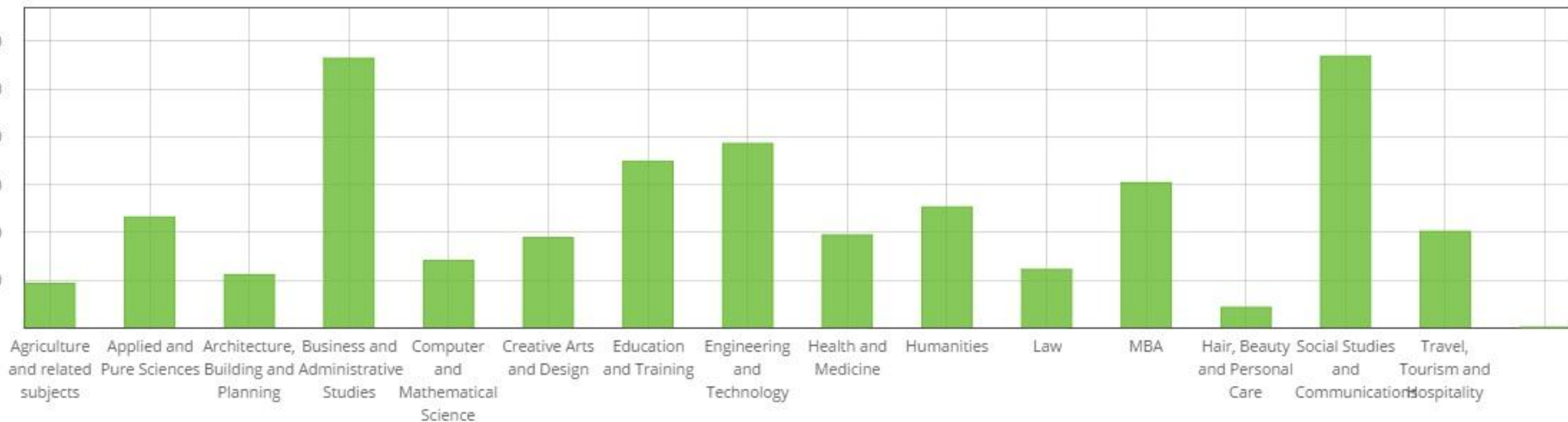
- **Agent and career counsellor knowledge is low** – need to educate advocates
- **Demonstrate the impact of studying in the UK:** Professional Enhancement, English Language Proficiency, Intercultural Sensitivity, Personal & Social Development
- **Need to educate about UK first and make information easy to access**
 - How to apply (UCAS)
 - Education pathways
 - UK selling points
- **Need to appeal to what Indonesian parents and students are looking for:**
 - Prestige, connections, employability, work placements/internships (if possible)
 - Parents want ROI on study abroad investment – higher graduate salary, internship or post study work
 - Help with subject choice
- **Scholarships are a badge of honour**, especially related to GPA or IELTS score

Expected Visitors Profile

Level of Study:



Subject of Interest:



Education UK Exhibition March 2015

Marketing and Promotional Channels

- Website and Social Media Campaign
- Email Blast (British Council's database and Partner's database)
- National and Local Newspaper (Bahasa Indonesia and English newspaper)
- Local Magazines
- Radio promotion in 3 cities
- Advertisement on major online portal (Detik.com)
- T-banner and temporary billboard placement at strategic locations in 3 cities
- Flyers to all schools in 3 cities
- Flyers to potential residential areas and shopping malls
- Education Agent Gathering
- Parents Information Seminar
- School & University Promotion Roadshow in 3 cities

UK selling points

- Academic standing
- Safety (compared to US)
- Multi-cultural and diversity
- Opportunities to work while studying
- Employability and recognition
- NHS Medical Insurance
- Available student discounts and student supports
- One year Masters

Tactical Messages

- Need very **easy to find international websites**
- **Locations outside London need introduction** (culture and environment), more promotion on the cultural side.
- **Break things down** – e.g. parents want to know how much to send each month
- **Complete information on International student support** at the university for International students – parents would want to know this.
- **Communicate relative costs vs. Australia**
- **Use Social Media for your campaign**
 - Indonesia is No 3 Twitter country in the world, 4th largest Facebook population in the world, Whatsapp is the most popular messenger in Indonesia.
- **Highlight cases of existing Indonesian students (Alumni)** if none then Malaysian
- **Global recognition of UK degrees** (counter post-study work)

Market News

<https://siem.britishcouncil.org/news/market-news>


MARKET NEWS

The latest education market news from our UK and local country staff and from selected external sources, focusing on issues affecting UK education, from changes to higher education policy and student visa procedures, to competitor analysis and media coverage.


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INDONESIA


Creative Economy Agency to receive funding of more than IDR 1 trillion

After the inauguration as the Head of Creative Economy Agency (BEK), Triawan...

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HE Encouraged to Cooperate with Private Sector

The Ministry of Research, Technology, and Higher Education (Kemenristek Dikti)...

 East Asia  Indonesia  06/02/2015

New scholarships for PhDs in Islamic subjects

President Joko Widodo launched the 5000 Muslim PhDs programme in December,...

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Thank You!

Please contact Nanda for any question on:
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