



EXPERIENCE LIFE-CHANGING LEARNING

STUDY UK
DISCOVER YOU



2 February 2017: Bangalore
Richard Everitt Director Education



Strong UK-India relations

India-UK Snapshot

9th Largest economy in the world (1)

1st Largest economy projected by 2030 (1)

India is the quickest growing major economy in the world (4)

FASTEST



7.5% Forecast GDP Growth (FY 2017) (3)

India has emerged as the third largest investor in the UK

The majority of UK businesses say Modi government reforms have made them increase their investment in India (4)

The UK is a world-leading nation of innovators, the UK has won 78 Nobel Prizes in natural and physical sciences and has the largest life sciences sector in Europe

The UK is the third-most innovative nation in the world (2)

The UK is the FinTech capital of the World

The UK is the largest G20 investor in India

7/10

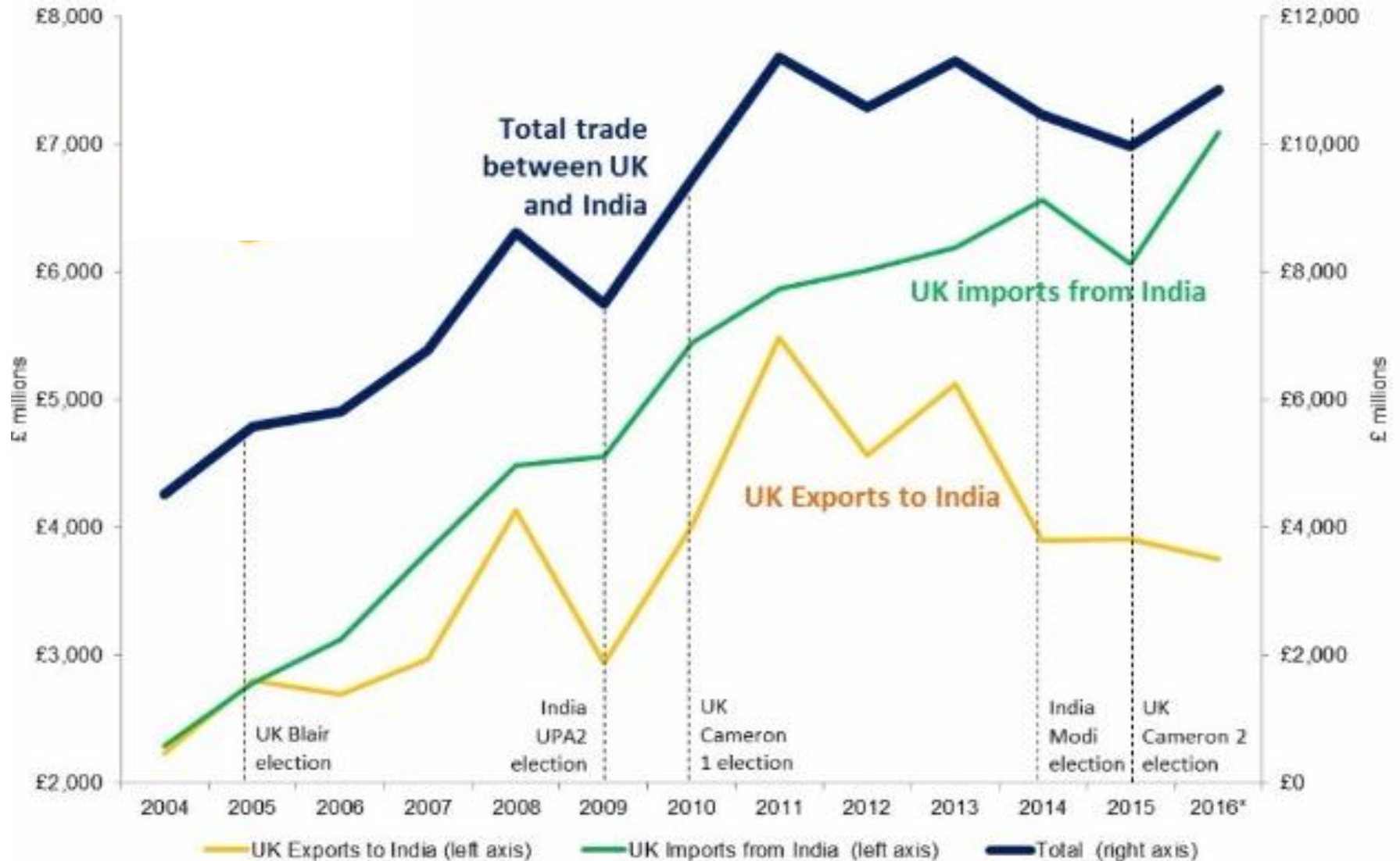
UK businesses give Modi government a score of 7/10 on overall performance in the two years of being in power (4)

The UK has the largest design sector in Europe and second largest in the world

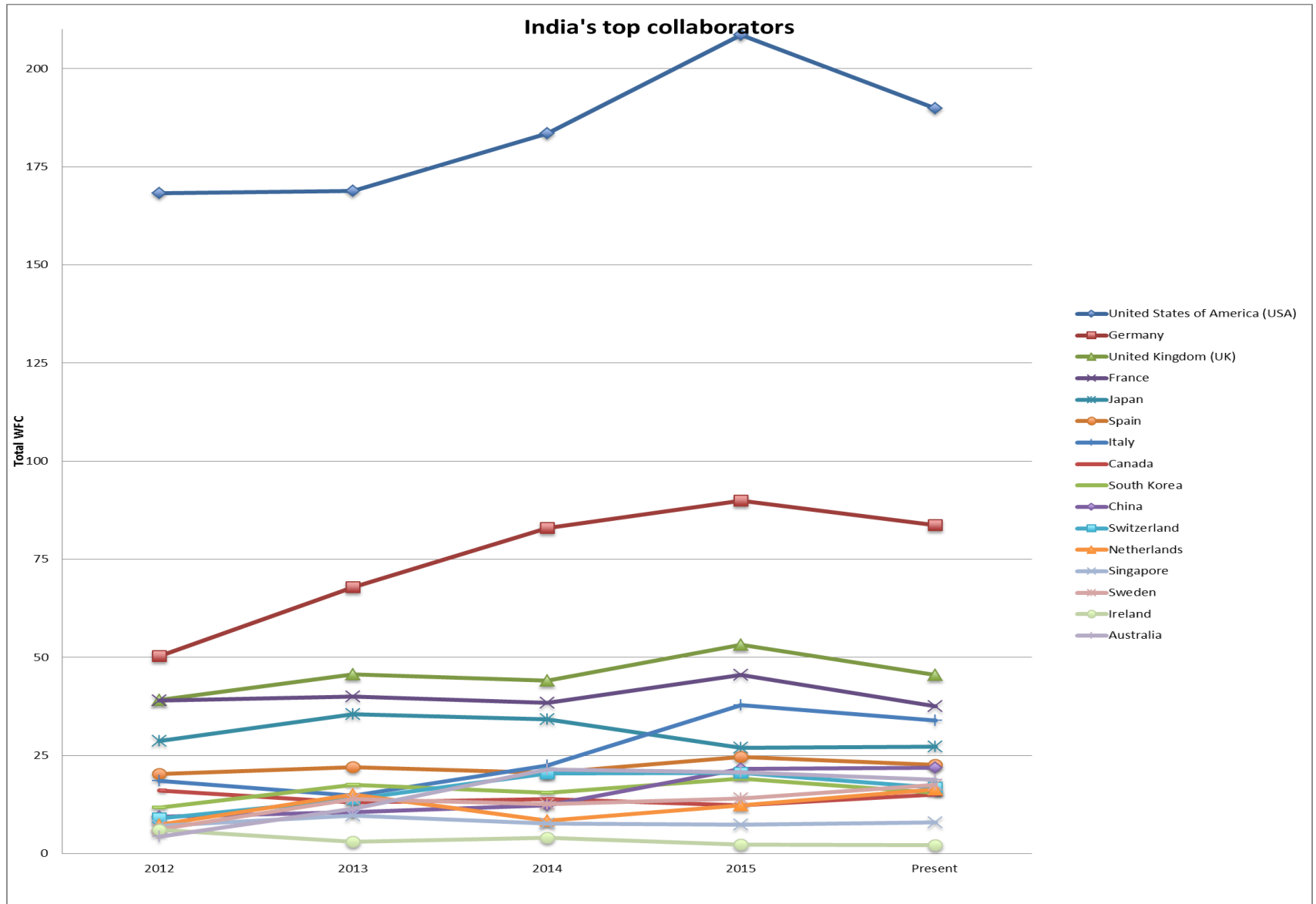
UK companies create one in every 20 jobs in India's organised private sector



Trade growth overall



While joint research 3rd



Last 12 months.....

- 2016 campaign
- Two rounds of exhibitions
- Study UK: Discover You launch
- Alumni – awards, fairs
- GREAT Talks
- 198 new scholarships
- New research – Cities
- SWAYAM promotion opportunities

- India Budget
- Demonetisation

- Elections in UP
- Education Policy
- EU Ref.and Trump impact



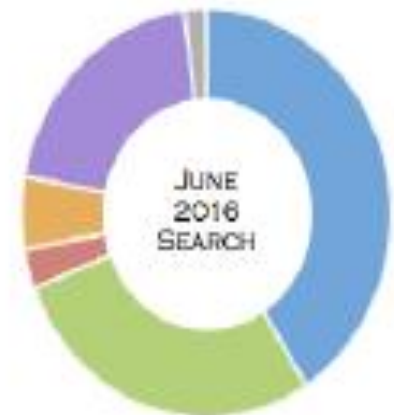
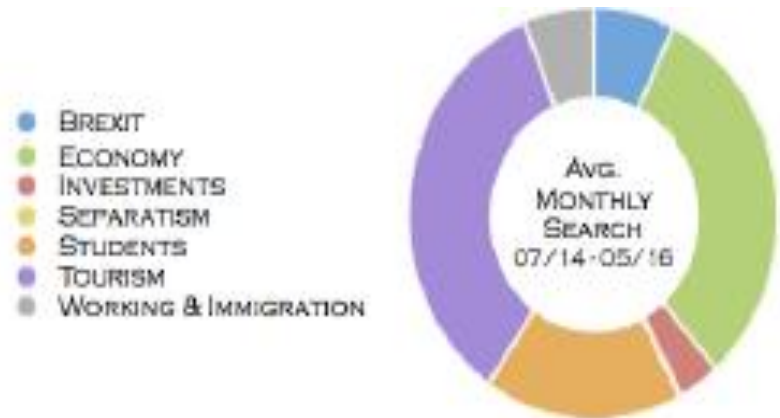
Online listening research Brexit

Overall: Focus on financial opportunity and positive and negative effects of the vote - and lesser concerns around racism and wider implications

Students: Long term concern about academic funding but with potential for cheaper fees

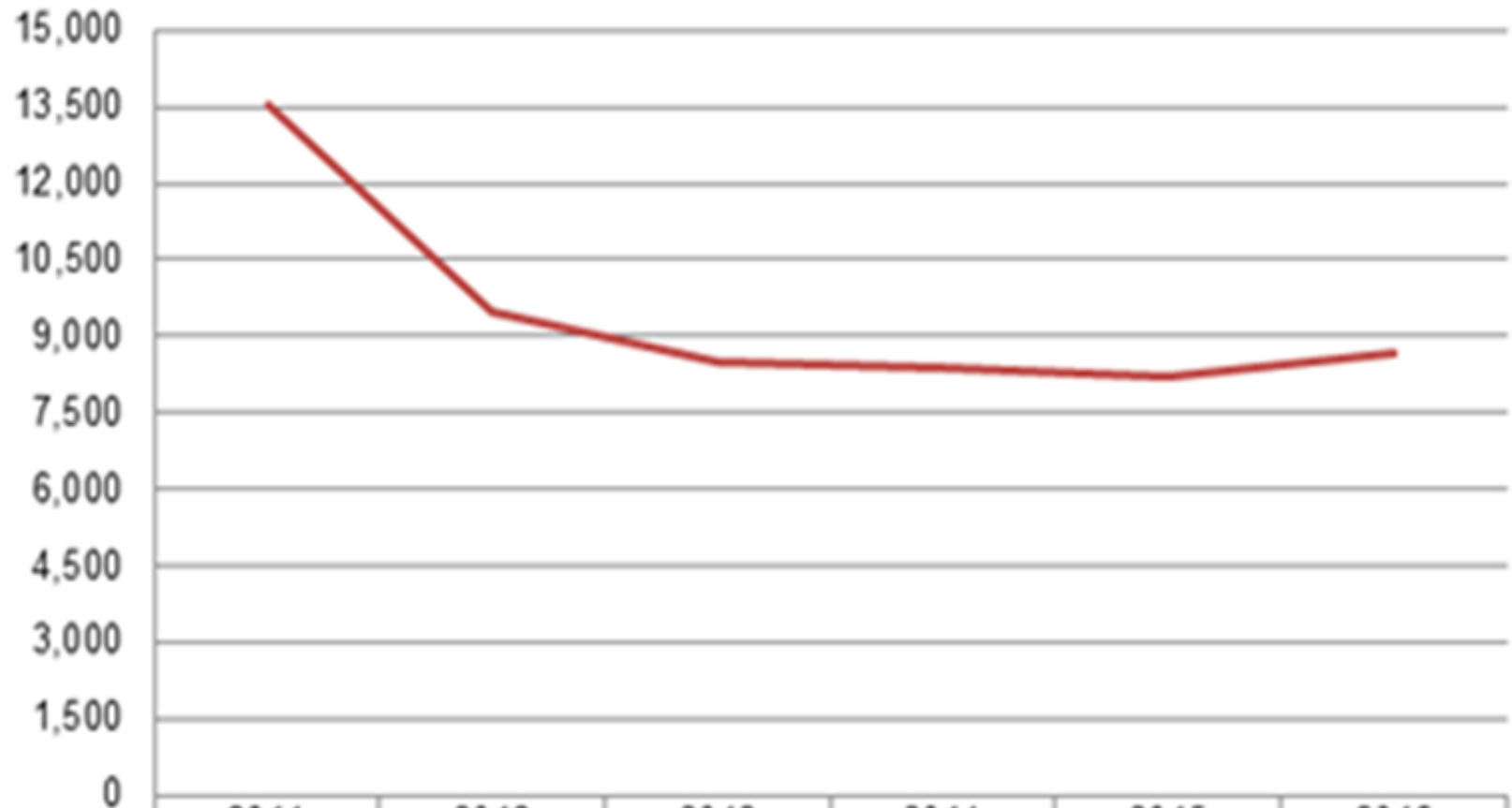
Tourism: Significant increase in search and discussion around value for money holidays in UK (139% increase, and 51% for hotels)

Work/Immigration: Longer term concerns about Indian companies, increased racism and the tech sector (140% increase in racism searches – dropped to 38% by July)



A positive indicator in recruitment

India: Q3 Tier 4 visas issues



	2011	2012	2013	2014	2015	2016
Visa numbers	13,517	9,472	8,503	8,393	8,224	8,692

Where are they applying from?

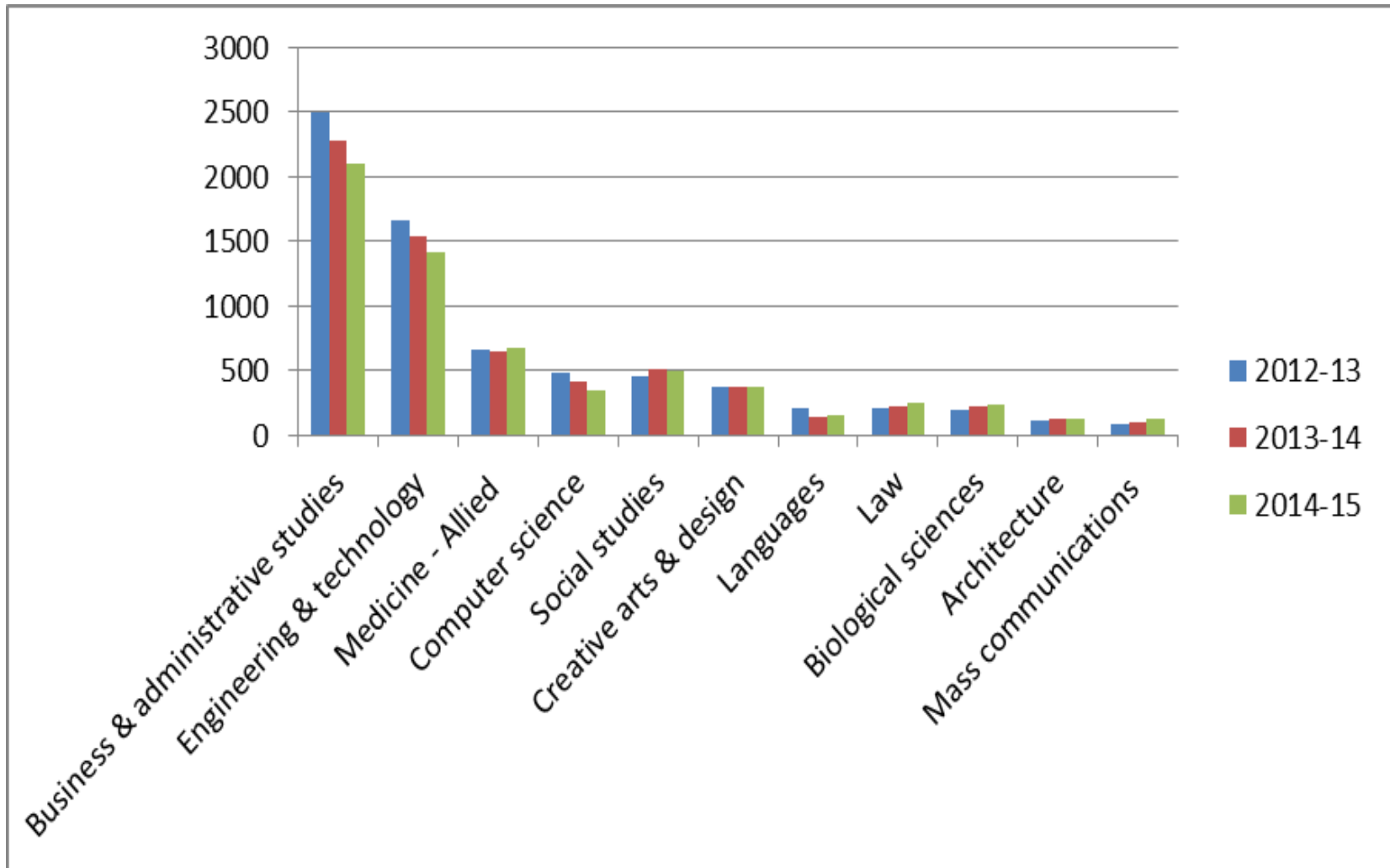
Tier 4 application VAC data indicates 8 key cities

Over 50% applications are from 2 metro cities
(Delhi 29%, Mumbai 23%)

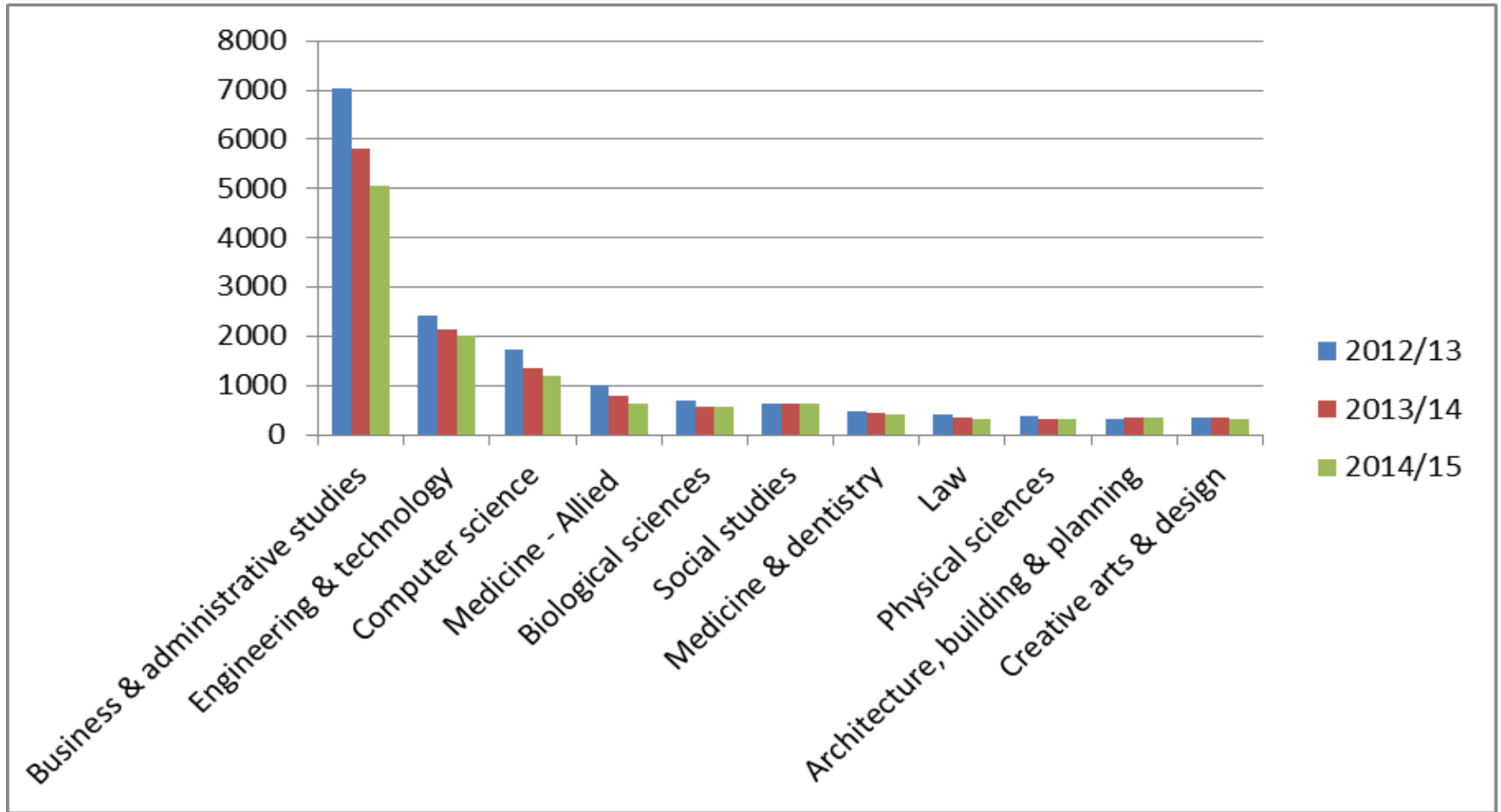
Mini metro markets include Bangalore, Chennai
(10% of applications each)

Other key markets: Pune, Hyderabad, Kolkata and Ahmedabad.

Top subjects - Undergraduate



Top subjects – Postgraduate



Bangalore 53	Chennai 45	Hyderabad 20	Pune 36	Delhi 37
(State Capital) 3rd Largest	(State Capital) 3rd GDP	(State Capital) 4th largest 4th GDP	(Smart City) Educ City	Capital 2nd Largest 1st GDP
3 Feb	5 Feb	7 Feb	9 Feb	11 Feb
Karnataka	Tamil Nadu	Telangana	Maharashtra	UT
61m (state)	71m	35m	112m	18.3m
10.8m (city)	8..2m	10.2m	5..9m	
7.3 m (18-23 state)	7.8m	4m	13.4m	2.1m
3,244 HEI inc. colleges	2,555	2,680	4,369	26 Univ 188 Coll
State: 55,715 Private:18,633	State: 36,505 Private:19,162	State:29,827 Private:13,326	Total :67,718 Private: 35,248	Total 8,224
89% Lit rate	90%	83%	86%	86%

Bangalore quick overview

- R&D hub of India (1/4 all start ups)
- High technical skills – aerospace industry
- Internationalised – 35% of all foreign students
- Royal Society of Chemistry Indian office
- 25% increase IGSCCE (Cambridge) last 5 years
- Supply and demand issue = large demand
- US No.1 (8,8k to UK's 665 in 2014)

Promotional activity Bangalore

- 30 key educational institutions visited
- 30 agents
- 115 institutions –digitally reached out, library data base, student data base
- Promotion on IELTS web pages
- 10 news paper ads
- 80 radio ads
- 2 mega hoardings, flyers at Bangalore Library
- Digital media marketing campaign

Promotion - Exhibitions

- Google search

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STUDY UK EXHIBITION

DELHI - 19 NOVEMBER
MUMBAI - 21 NOVEMBER
KOLKATA - 23 NOVEMBER
LUCKNOW - 25 NOVEMBER
AHMEDABAD - 25 NOVEMBER

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