



# INTERNATIONAL EDUCATION SERVICES

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India Market Update

All India Briefing, Study UK India Virtual Fair Aug 2020

@inBritish @JanakaP

<https://education-services.britishcouncil.org>

# India



**3RD**  
LARGEST ECONOMY BY PPP



**1.3**  
BILLION POPULATION



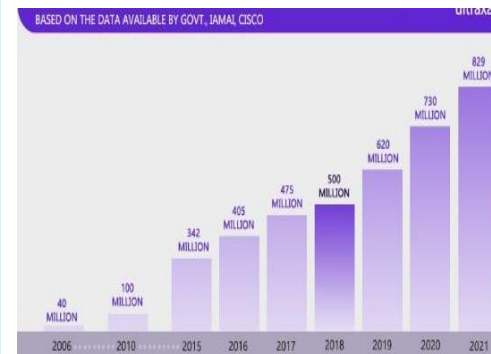
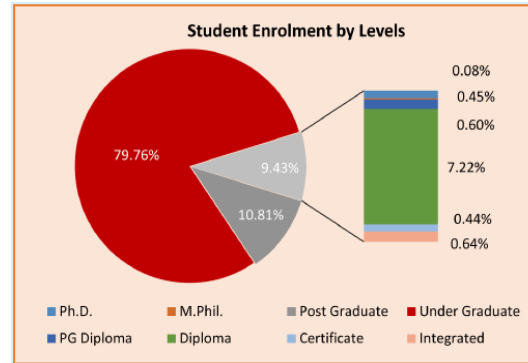
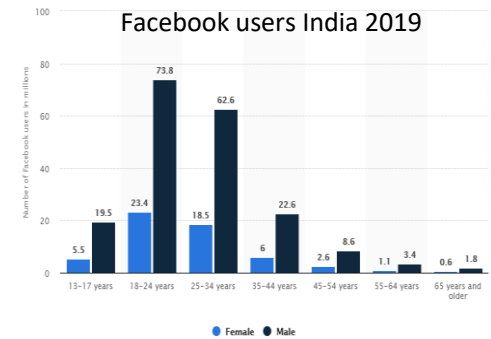
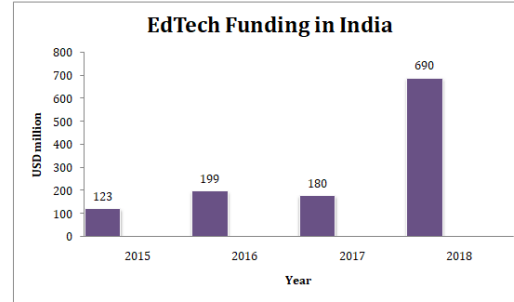
**100 BN US \$**  
E-COMMERCE INDUSTRY BY 2020

**3.6**  
TRILLION US \$  
CONSUMER MARKET BY 2025

**29 YEARS**  
(MEDIAN AGE)  
YOUNGEST NATION BY 2025

**2ND**  
LARGEST  
ROAD NETWORK  
5.5 MN KMS

**99%**  
LITERACY RATE BY 2025

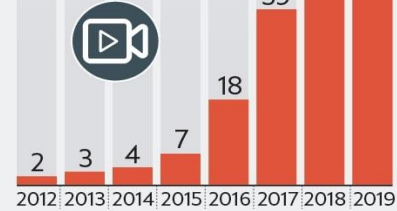


# Changing consumption patterns of India

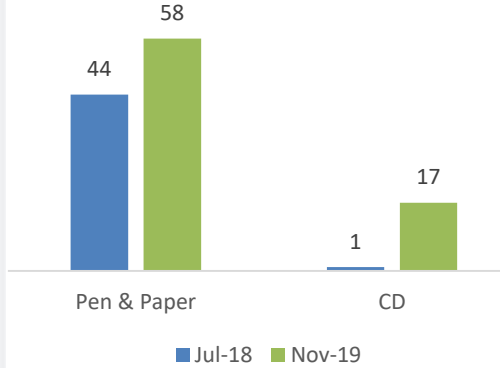
## Screen time

Average time spent watching videos is expected to rise to 67 minutes/day by 2019

Time spent viewing video in India (in minutes)



IELTS testing locations in India



## Based on learner activities on Coursera

US 7.8 mn      India 3.4 mn      China 2.3 mn

Oberio

TikTok App Conquers the Teens of the World

41%

of Tik Tok users are aged between 16 and 24. (socialmediaindex, 2019)



## Factors Prompting ecommerce Companies to Focus on Mobile Commerce

**A** Changing Consumer Shopping Behaviour\*

91%

91% have researched a product or service on their phone

**B** More Business Coming From Tier2/Tier3 Cities

8%

Proportion of ecommerce's addressable market in top 8 cities

30% -50%

Rise in ecommerce transactions in Tier 2 and Tier 3 cities

## Festive Fireworks

**Over \$3.5B** GMV clocked by Amazon and Flipkart in last six days, according to estimates

**2x** Increase in number of transactions in tier-III cities, says Flipkart

**15X** Growth in smartphone purchases on Amazon

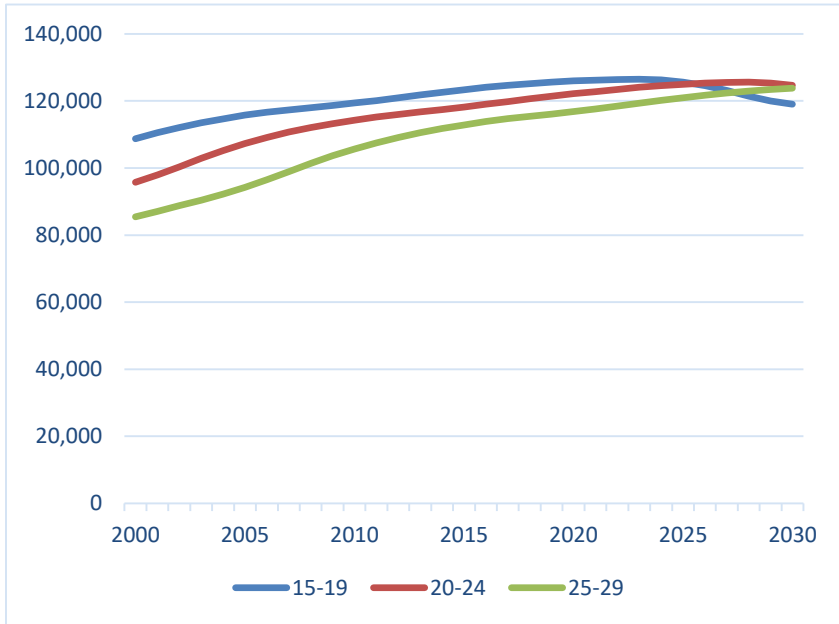


**50%** Growth in new customers, Flipkart says

Amazon received orders from **99.4%** of pin codes in the country

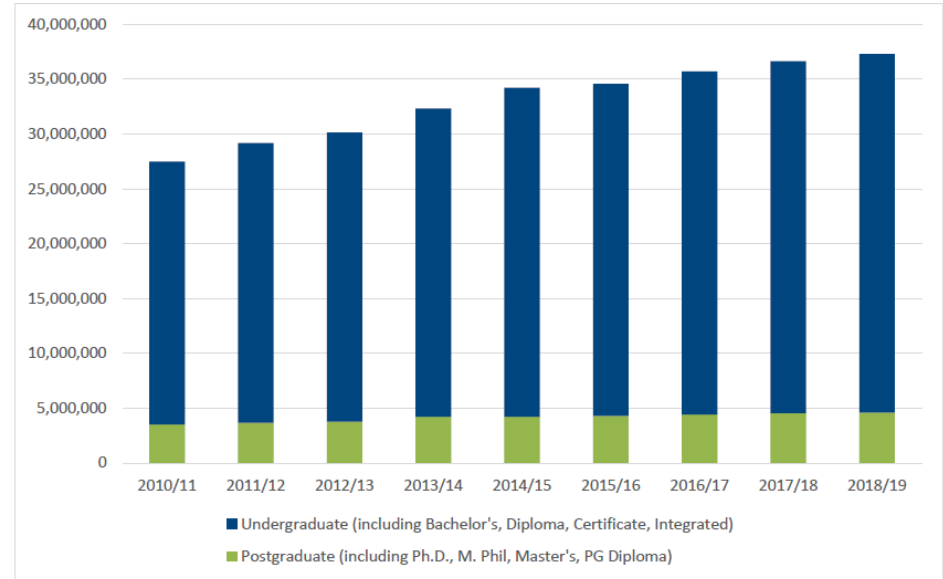
# India is set to be the largest student market

India has one of the world's largest higher education systems, with 993 universities, 39,931 colleges, and 10,725 institutions at the tertiary level in 2018/19



Large student age population to peak within 5 years

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Enrolments in HE 25%+ since 2014/15

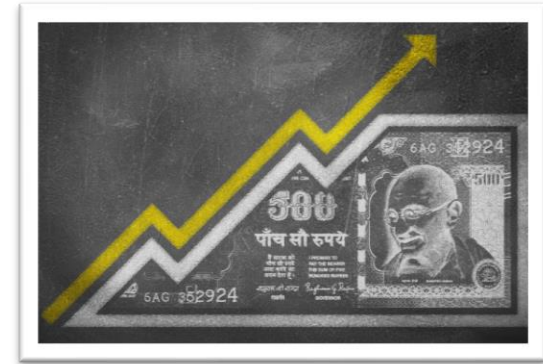
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# Drivers of change in India



- 637 million internet users growing at more than 18%
- Highway construction crossed 10,000 kms during 2018-19, which translated to 30 kms a day
- Digital payment volumes in India are set to grow at over 20 percent each year over the next four years
- Make in India aims to transition India to a manufacturing-based economy and cut red-tape

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- A growing middle class (shades of China)
- Aspirational population looking for opportunities beyond India
- India's youth population is large and growing and peaking now. 15-24-year-olds is projected to increase to 126 million by 2020 and then decline
- Spending on tuition and hostel fees by Indians studying overseas has gone up by 44 per cent from \$1.9 billion in 2013-14 to \$2.8 billion in 2017-18

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# Local education trends

- The most popular programmes for undergraduates were arts (33 per cent), science (16 per cent), commerce (14 per cent), and engineering and technology (13 per cent)
- Recent years have seen a growing call for infrastructure funding for institutions, particularly research facilities and student accommodation.
- Enrolments in ODL programmes increasing and supported by government funded e-learning platforms. ODL accounts for 10.6 per cent of India's total enrolments in HE programmes.
- In February 2020, the Indian government announced top 100 Indian institutions will be allowed to offer fully online degrees. In January, seven HEIs had programmes approved for online learning.

# NEW EDUCATION POLICY

# New National Education Policy – Higher education context

- Introduces four-year undergraduate degrees with multiple entry and exit options and a common higher education regulator (except medical and Legal courses)
- One to two year PG programme
- MPhil courses will be discontinued and undergraduate, postgraduate and PhD level will be interdisciplinary
- Allow top foreign universities to set up campuses in India.
- A new umbrella regulator (except Medicine and Law) the Higher Education Commission India to replace University Grants Commission
- College affiliation system to be phased out in 15 years

Break down of the NEP and what it means for the UK will be shared with the sector soon through thought-pieces and webinars.



# STUDENT MOBILITY

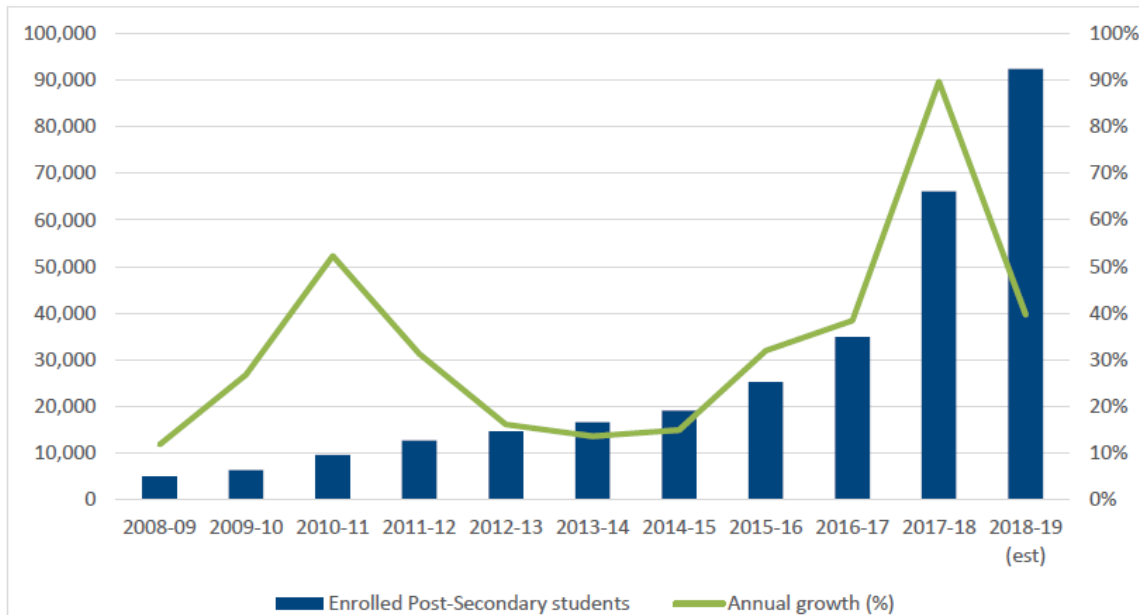
# Outbound mobility trend

- India is currently the world's second-largest source of international students after China. The number of Indian students enrolled in degree programs abroad more than doubled from 134,880 students in 2004 to 332,033 in 2018
- Outbound student numbers continue to climb in countries which offer an attractive study and post-study work environment.
- The majority of Indian students studying abroad are postgraduates. Undergraduates numbers are smaller but consistent over the last eight years.
- The US is the top destination for Indian students, followed by the UK, Australia and Canada.
- Indian students are also increasingly looking to cost-effective alternatives in non-English-speaking countries, such as the United Arab Emirates, China, and Germany.
- At present, most TNE programmes delivered in India consist of full-time franchised or validated programmes. Enrolments on UK TNE programmes (excluding Oxford Brookes and distance learning) in India have declined since reaching a peak in 2013/14, down to 5,945 in 2017/18, according to HESA data.

# Canada is rapidly growing

## Canada

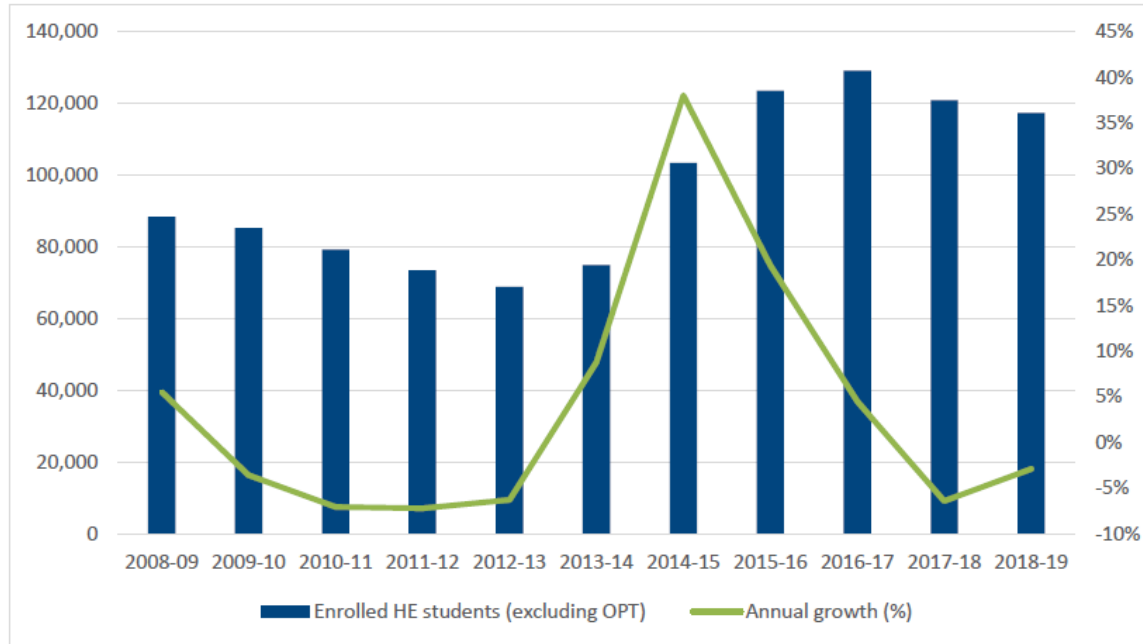
Figure 10: Indian HE Students in Canada



# USA has seen declines

## United States

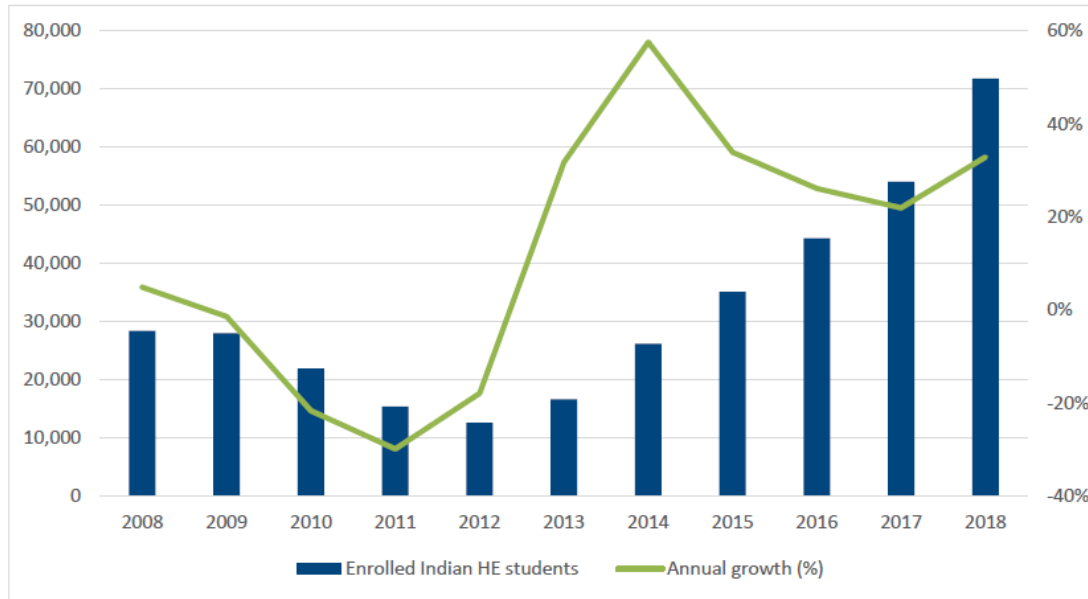
Figure 8: Indian HE Students in the U.S.



# Australia has more than doubled in last decade

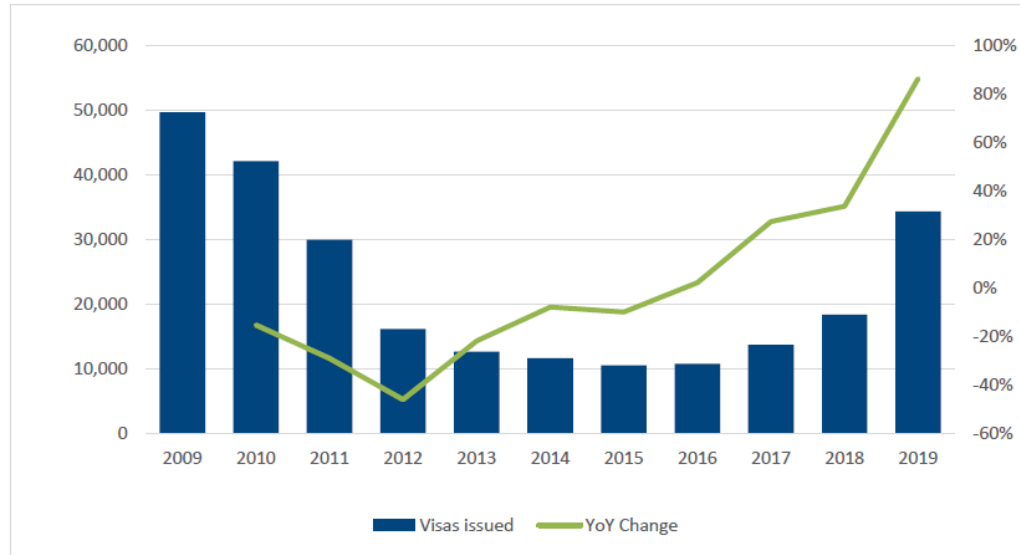
## Australia

Figure 9: Indian HE Students in Australia



# UK recruitment

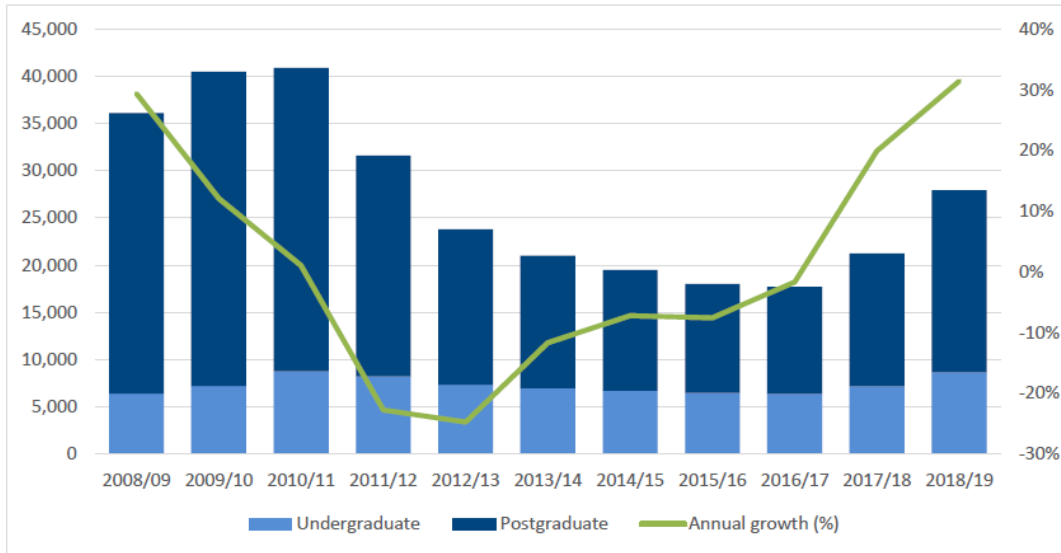
Figure 5: UK Student Visas (Tier 4)



The UK saw a major increase in the number of Indian students in 2019. Tier 4 visa issuances jumped 89 per cent from the previous year, a total of 34,384 visas granted

# UK recruitment

Figure 5: Growth of Indian enrolments in the UK: UG and PG split



In 2018/19 there was a 31 per cent increase in Indian enrolments at higher education institutions in the UK, the second consecutive year of growth but the highest growth rate in a decade.

Roughly two-thirds of Indian students coming to the UK to study are in postgraduate programs, a ratio that has remained stable over the last seven years.

# Subject preference in the UK

- Due to the major increase in Indian enrolments in 2018/19, almost all subject areas saw growth.
- For undergraduates, enrolments in social studies, biological sciences, law, architecture, building and planning, and medicine and dentistry have increased over the last five years
- Postgraduate enrolments in social studies, languages, and law increased for the fifth consecutive year. No subject area enrolments declined for postgraduates in 2018/19
- This caused trend reversals in business and administrative studies, engineering and technology, biological sciences, medicine and dentistry, subjects allied to medicine, and mass communication and documentation.



# Covid19 in India - update

- India has started to open up after over 3 months of lockdown
- Educational institutions remain closed for f2f instruction. Online classes are on in schools and HEIs
- School final exam results of CBSE and ICSE announced in July
- UGC directive to hold final year exams HE students
- Domestic flights operational, international passenger commercial flights are not till 31 August at least
- UK-India flights to become operational – Spicejet has announced flights and UK carrier approved by Indian Government
- Media reports are mixed – some positive, some naming and shaming of foreign universities
- USA visa withdrawal heavily criticised in Indian media
- Positive coverage of visa policies in Indian media

# Surveys and on-ground sentiment

- Survey of prospective overseas students in India conducted in April
- Among those who have already applied to study abroad, 43% in India said that they are 'not at all likely' to change their plans
- The UK and Canada were the most popular overseas alternatives
- 67% respondents from India indicated strong concern over health and wellbeing and personal safety
- 57% Indian respondents 'very concerned' about finances, compared to 40% in China.

On ground activities by the British Council show appetite for September intake but increased interest in January intake.

Main questions around GIR, NHS, Health surcharge, families travelling.

# Upcoming British Council activities

- #readyforyou communication campaign rolling across all British Council channels
- Series of Facebook and Teams Live events to engage students and agents
- Student Survey V.2 underway and expected early September
- Webinar on NEP in August/ September
- Recruitment and brand building services such as masterclasses, thematic webinars, virtual fairs, summer school partnerships and more
- Visit the India section on IES website to keep abreast of all news coming out of India, new events and services

# Q&A

**Write to:**

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**Visit:**

**<https://education-services.britishcouncil.org/>**