



Refining your India strategy

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Refining your India strategy: six recommendations

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New Indian Government: 6 months and 6 points

- New Prime Minister: Skill at Scale and Speed
- 5 new IIT's and IIM's plus 4 new Central Universities
- National Quality Survey
- National E-Library : a new online portal by 2015
- Enhancing employability
 - ✓ New Vocational programmes
 - ✓ Council for Industry-Higher Education Collaboration (CIHEC)
- Foreign Education Providers bill – no move!

Competition

Country	2011-12	2012-13	2013-14
UK	18,154	13,808	12,980
USA	1,00,270	96,754	1,02,673
Australia	33,764	24,808	34,130
Canada	12,049	13,136	14,000
Germany	5,998	7,532	9,619
France	1,757	2,600	3,300

and our efforts....

- GREAT Campaign 14-15
- Enhanced Chevening scholarships
- Positive messaging by VIP visitors

Decline levelling off !!

HEI Student visa trends - 4 quarter yr-on-yr change (%)

	2011 Q1	2011 Q2	2011 Q3	2011 Q4	2011	2012 Q1	2012 Q2	2012 Q3	2012 Q4	2012	2013 Q1	2013 Q2	2013 Q3	2013 Q4	2013	2014 Q1	2014 Q2	2014 Q3
Visa applications – absolute*	3228	744	12069	1676	17717	2134	789	9163	1687	13773	1915	578	8701	1638	12832	1535	531	8238
Visa applications - 4 Quarter yr-on-yr change	-	-	-	-12%	-12%	-28%	-28%	-27%	-22%	-22%	-18%	-20%	-6%	-7%	-7%	-8%	-7%	-7%
Visa acceptances – absolute**	10569	3244	13448	2654	29915	3293	1572	9399	1843	16107	1948	596	8445	1609	12598	1468	507	8307
Visa acceptances - 4 Quarter yr-on-yr change	-	-	-	-29%	-29%	-48%	-51%	-52%	-46%	-46%	-35%	-34%	-24%	-22%	-22%	-18%	-13%	-7%

Implied change in acceptances impacting first yr intake to next academic year (Q4-Q3) vs (Q4-Q3) acceptances

Impacting
Academic yr 12-13
-52.2%

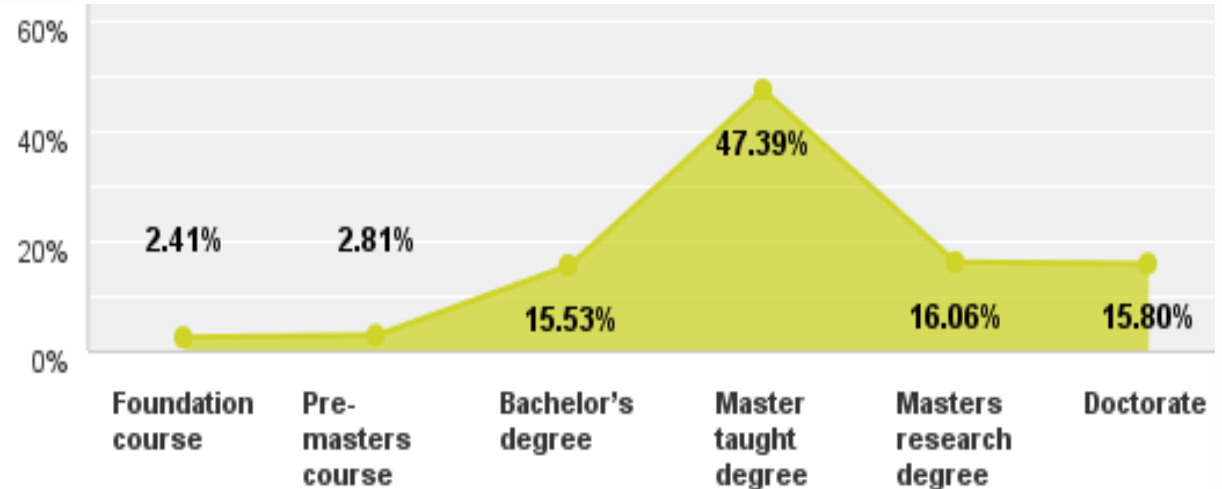
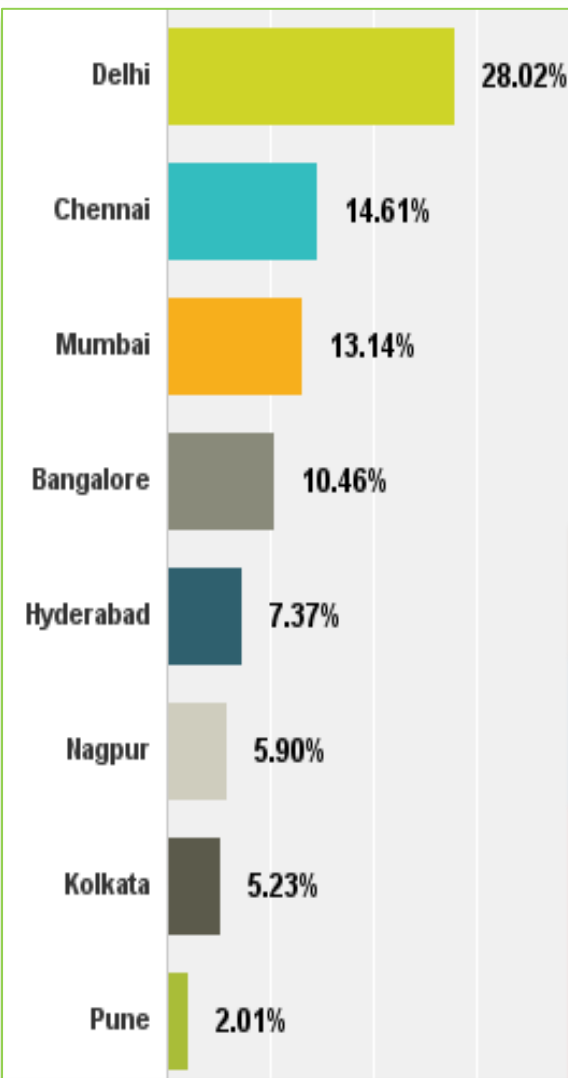
Impacting
Academic yr 13-14
-24.2%

Impacting
Academic yr 14-15
-7.3%

Nearly 800 students took the survey



More than 60% were of 18 to 23 years of age group



Over 56% students would apply 'directly' while 43% would seek an agents' assistance

More than 55% students would rely on an agent for 'country selection' while more than 60% would seek an agents help to choose the 'right institution'

Why did students apply directly?

65% got all information from 'Internet'. 32% visited Ed UK exhibition. 30% got assistance from family/friends. 29% never intended to use agent 25% found agents fee very high

Top six recommendations for success in India

1. Focus on 'Quality'
2. Highlight internships/work placements and industry links
3. Audit your Digital promotion
4. Agents - are they marketing your brand effectively
5. Alumni – 'word of mouth' your best friend
6. It's a long haul