

**British Council G20+**

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# **EU Region**

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# Introductions & Agenda

## 11:30 EU Region

- **Welcome to the Region**
- **Changes on intention to study in the UK because of UK's exit from the EU**
- **Implication for university messaging**
- **Implication for communication channels**

## Country tips and insights

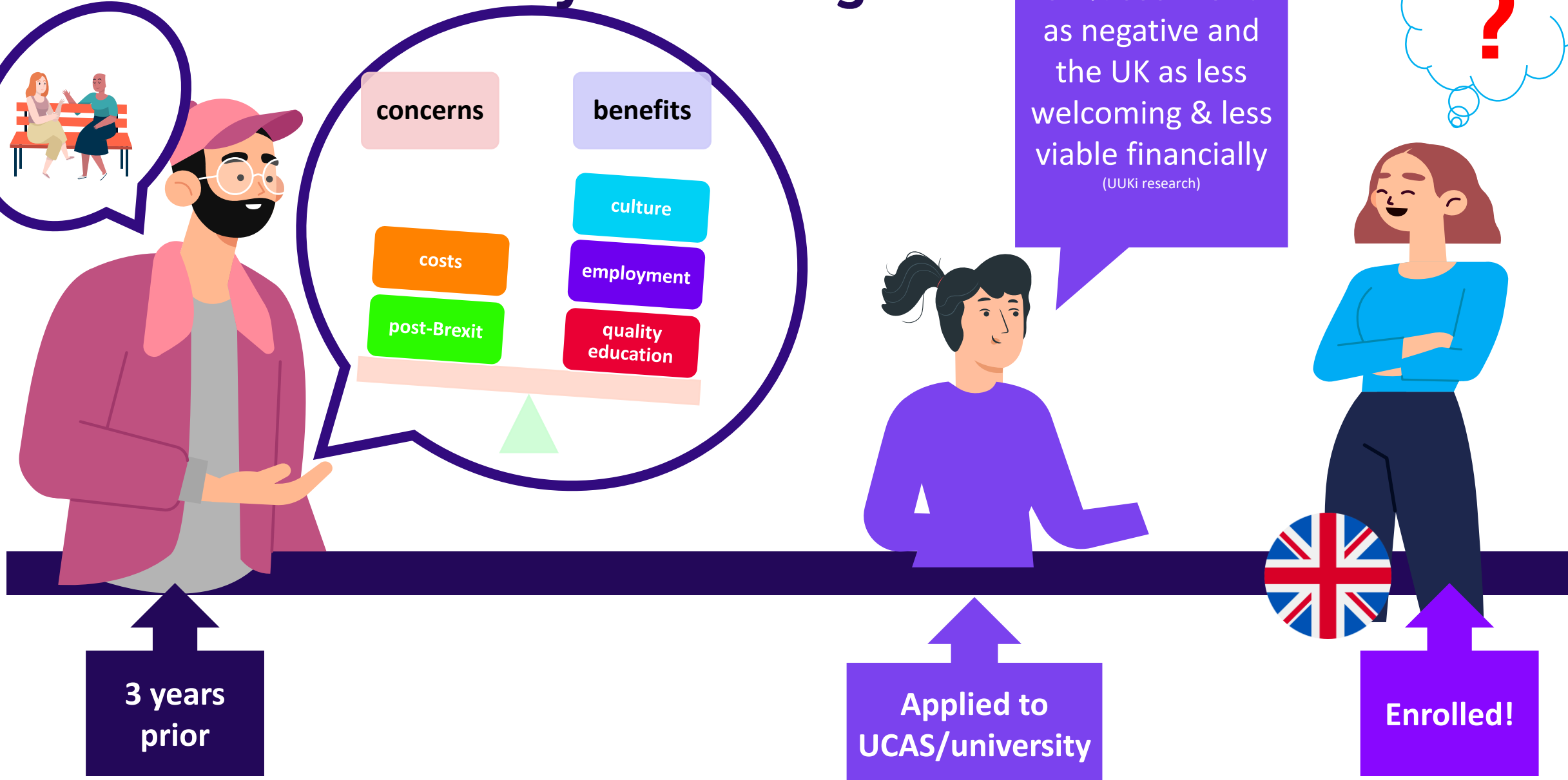
- **12:00 Germany**
- **12:20 Italy**
- **12:40 Greece**

# Welcome to the EU region

- presence in 28 countries
- focus on Spain, France, Italy, Greece, Cyprus, Germany, Poland, Bulgaria and Romania
- English exams delivered in 239 locations to 388,600 candidates
- Student mobility: first online recruitment event: **Study UK Europe Gateway to the UK 19 Oct – 13 Nov**
- research (EU student behaviour) and insights (weekly Covid-19 updates)
- country-tailored advice, consultancy, direct marketing

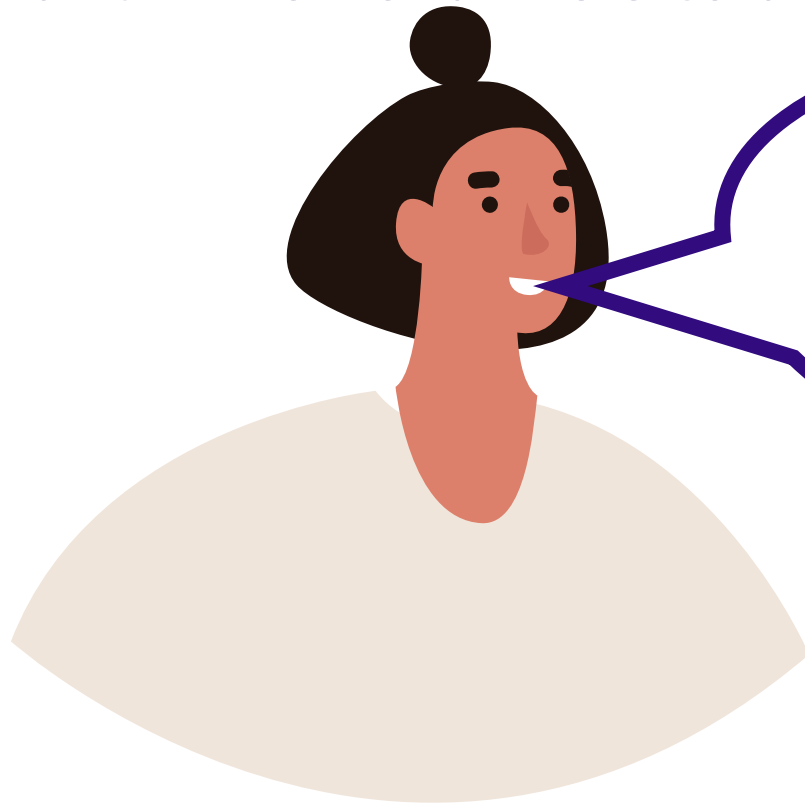


# The Student Journey – our insights



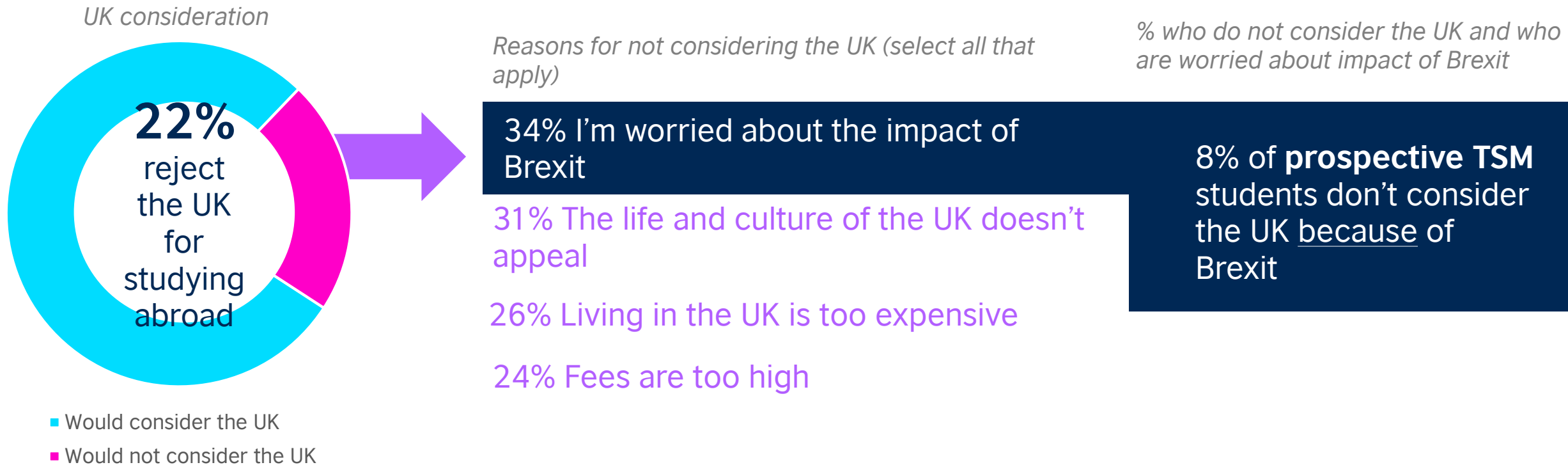
# Changes on intention to study in the UK because of EU exit

The UK's exit is having a negative impact on intent to study in the UK – but we can deliver positive messages to EU students if we know what to say and which channels to use



*I don't know how the situation will unfold.  
Things are way uncertain right now and the UK seems like it's  
drawing back.  
That's why I would consider something more secure even though I  
always wanted to go there."  
Greece, Female*

# Among those who don't consider the UK as a destination for study, Brexit is the main reason for rejection



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## For 4/10, Brexit has weakened UK consideration, but over half won't be put off

**42%**

Brexit makes me less likely to consider the UK

**29%**

Brexit makes no difference when considering the UK

**27%**

Brexit makes me more likely to consider the UK

56% are either indifferent or more positive: likely to maintain over half the students considering the UK for higher education. Just 2% are unsure

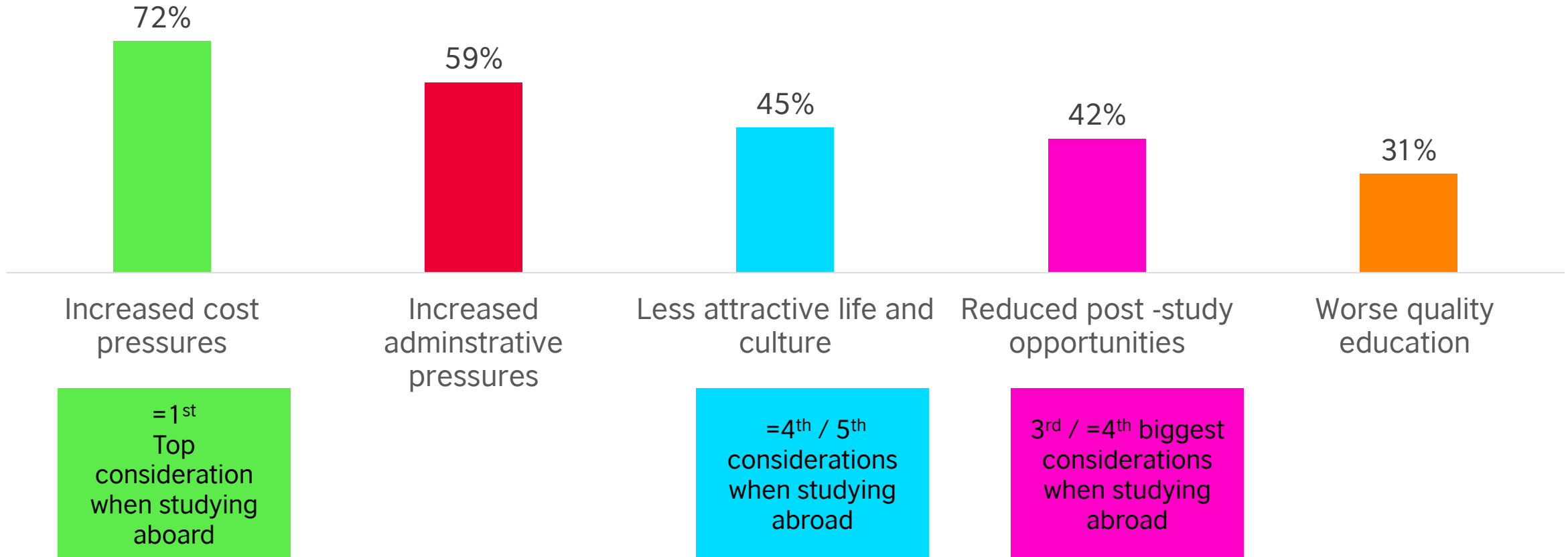
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## How do you best reach the **42%** of PG students who sit on the fence?

- Understand and address their concerns
- Understand and respond to the alternatives they consider
- Understand and promote what they value about the UK



# Concerns: typically, Brexit leads to worries about the cost of studying in UK, but concerns are multi-faceted...



# Cost concerns are not limited to tuition fees; they extend to healthcare costs and loan access as well

Fees are the main concern...

*Post Brexit concerns*



But concerns about costs are widespread

**33%** Healthcare costs will increase

**31%** Harder to access student loans

**25%** Upfront payments needed

**23%** Unable to receive UK govt. grants



*“Immense **tuition fees** due to non-EU tariff; the **EU funding** programs can no longer be used.”*



*There was a lot of funding things to study in UK, now after Brexit studying there will be more **expensive**.*

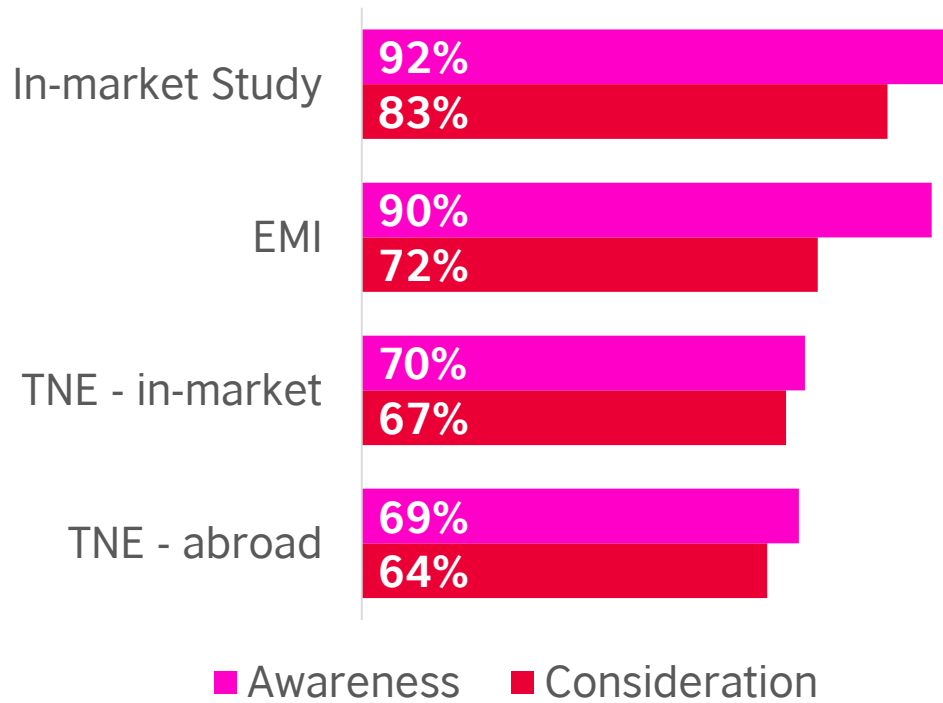


*“I believe that **tuition for universities will be multiplied**. In particular, I believe that the fees will be as much as the non-British and European citizens have paid so far, **an astronomical amount for my own finances and that of my family**.”*



# Alternative provision: students know TNE and EMI and are considering as alternatives

*Perceived benefits of study modes (ranked top benefit)*

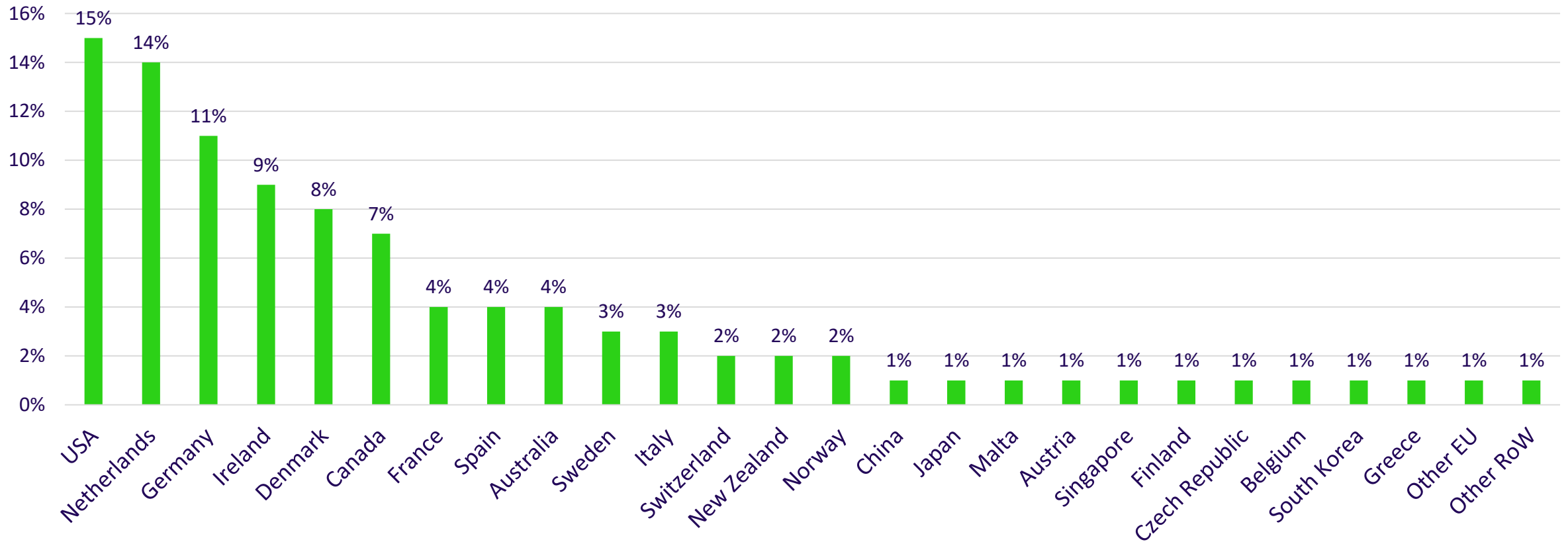


	TSM	In-Market TNE	EMI
Opportunity to improve language skills	13%	15%	12%
Improving future employability globally	12%	11%	12%
Opportunity to experience life & culture of another country	11%	10%	7%
Gaining an internationally recognised qualification	11%	12%	14%
Opportunities to work in the country after studying	11%	8%	10%
Accessing high quality universities and academic research	8%	8%	9%
Improving future employability in my home country	8%	8%	8%
Gaining self-confidence and independence	7%	8%	6%
Making friends and contacts with people internationally	6%	6%	5%
Availability of specific courses	5%	6%	5%
Getting better value for money for fees	4%	4%	6%
Flexible learning options that meet needs	4%	4%	5%

**EMI is just ahead of TNE in their home market**

# Alternative countries: which ONE of these countries did you consider most seriously as an alternative country to the UK?

Sample: EU, 547 (Those who considered studying in at least one alternative country)



# What the UK is valued for: quality, culture, careers & job prospects

## Course, requirement and quality of education

<b>UK</b>	<b>96%</b>
USA	93%
Germany	88%
Canada	88%
Netherlands	66%

## Culture

Germany	96%
<b>UK</b>	<b>93%</b>
USA	93%
Canada	88%
Netherlands	72%

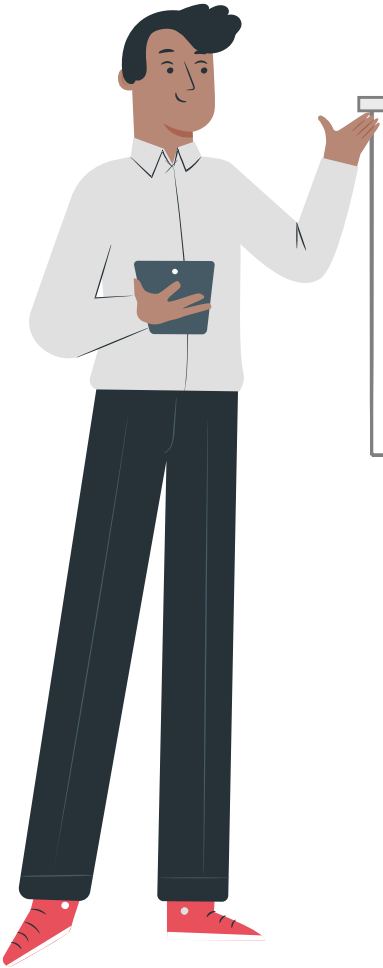
## Cost

Germany	74%
<b>UK</b>	<b>59%</b>
Canada	55%
Netherlands	52%
USA	50%

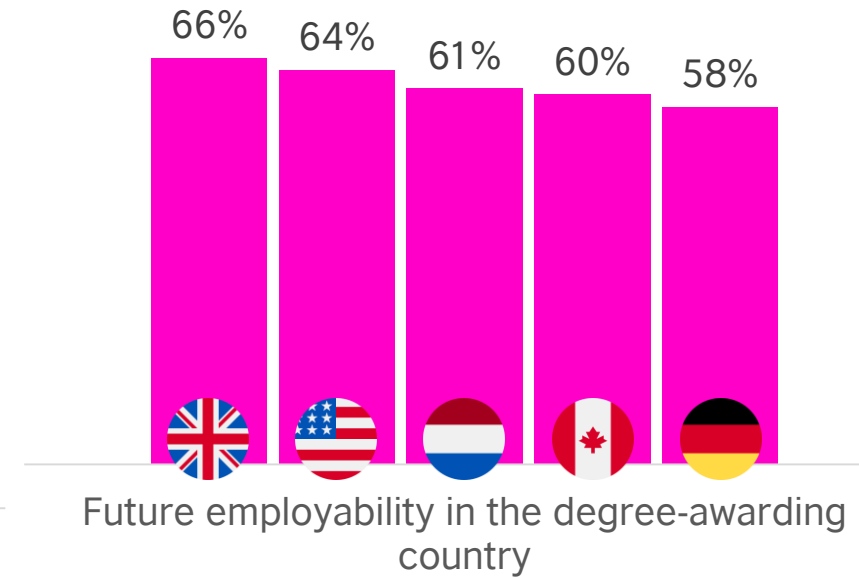
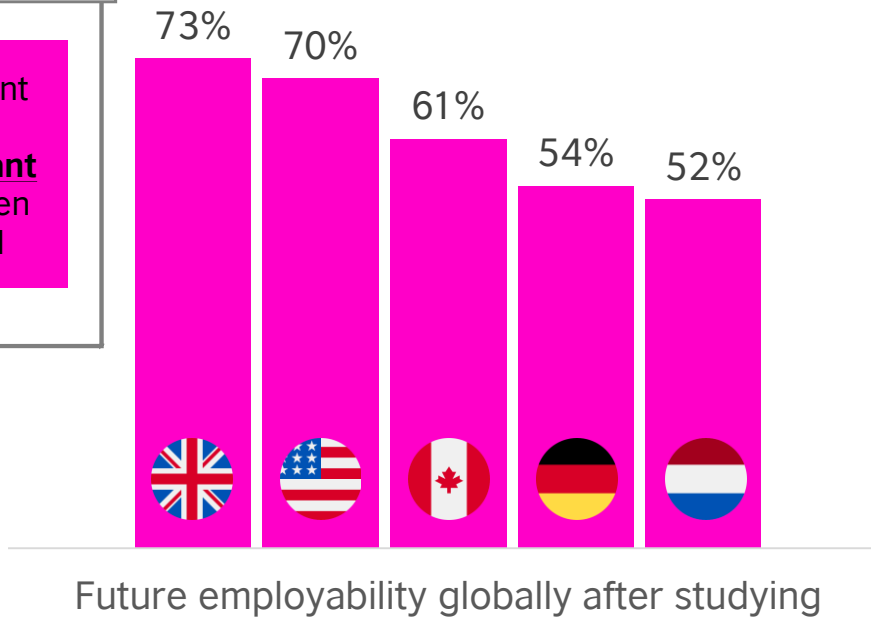
## Employment

<b>UK</b>	<b>82%</b>
USA	80%
Germany	75%
Canada	74%
Netherlands	55%

# Studying in both the UK and USA is felt to offer stronger global employment opportunities



Global employment opportunities:  
**2<sup>nd</sup> most important** consideration when studying abroad



**A real opportunity for the UK to promote these global career opportunities but need to differentiate this against USA**

# But ... proximity is a big competitive advantage of the UK vs USA for EU students



New EU students



over



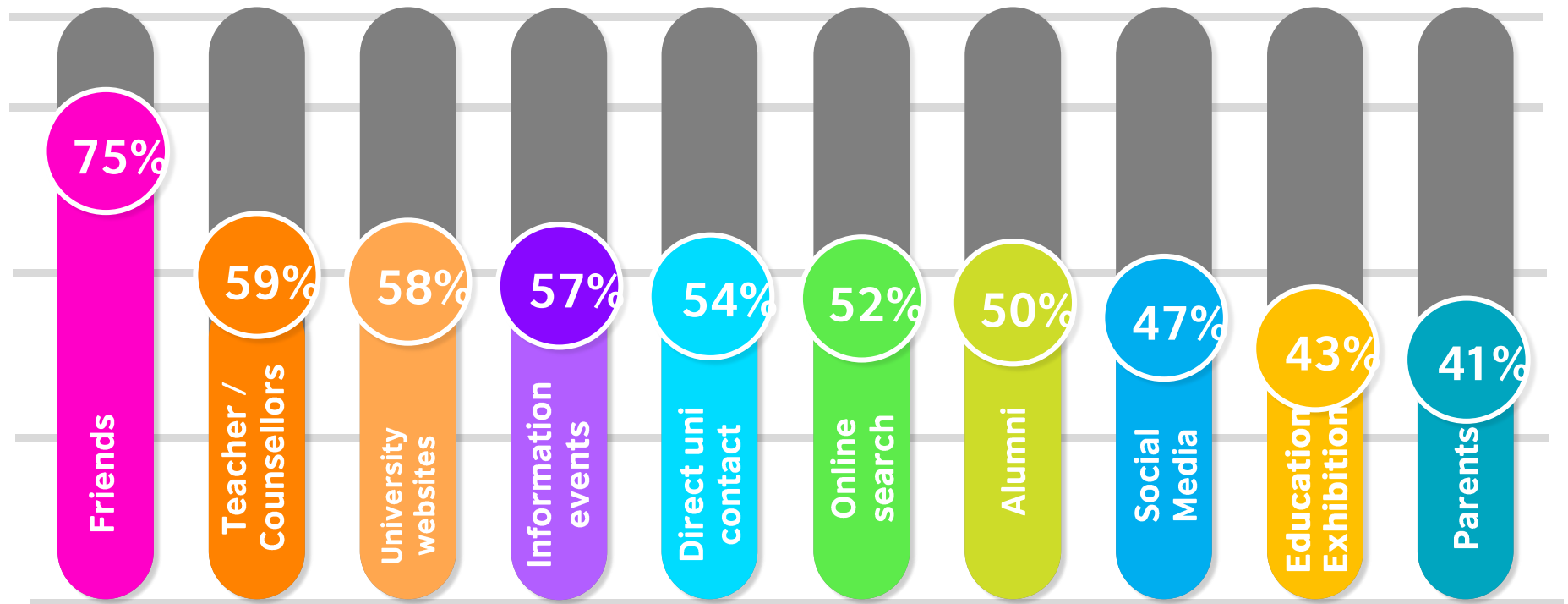
New RoW students



# Which channels should you use to reach PG students?

## Prospective students use 12 separate channels to explore their options

**12**  
Average  
no. of  
channels  
used



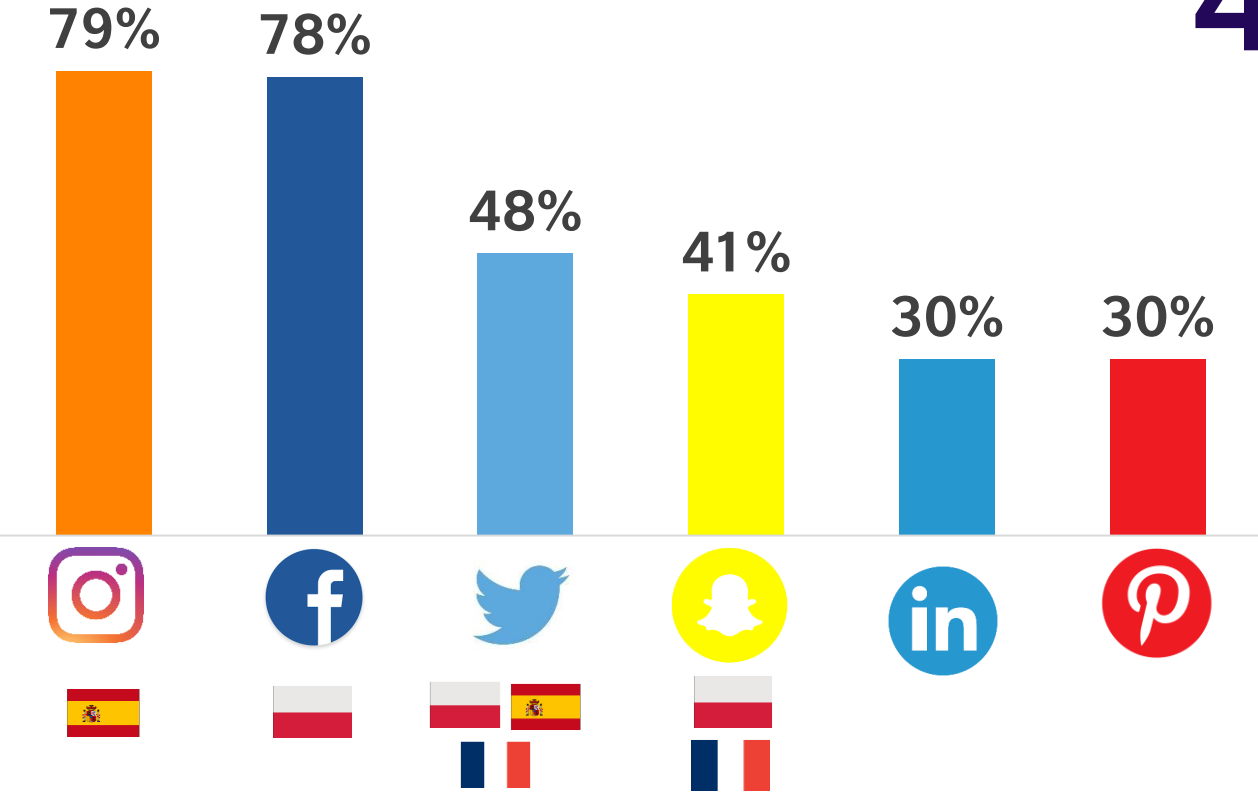
Peer to peer influence is huge - it'll be important to capture 'peer voices' and to ensure content can easily be shared with friends



# While students are active on social media, it's not yet central to researching their options for studying abroad

# 43%

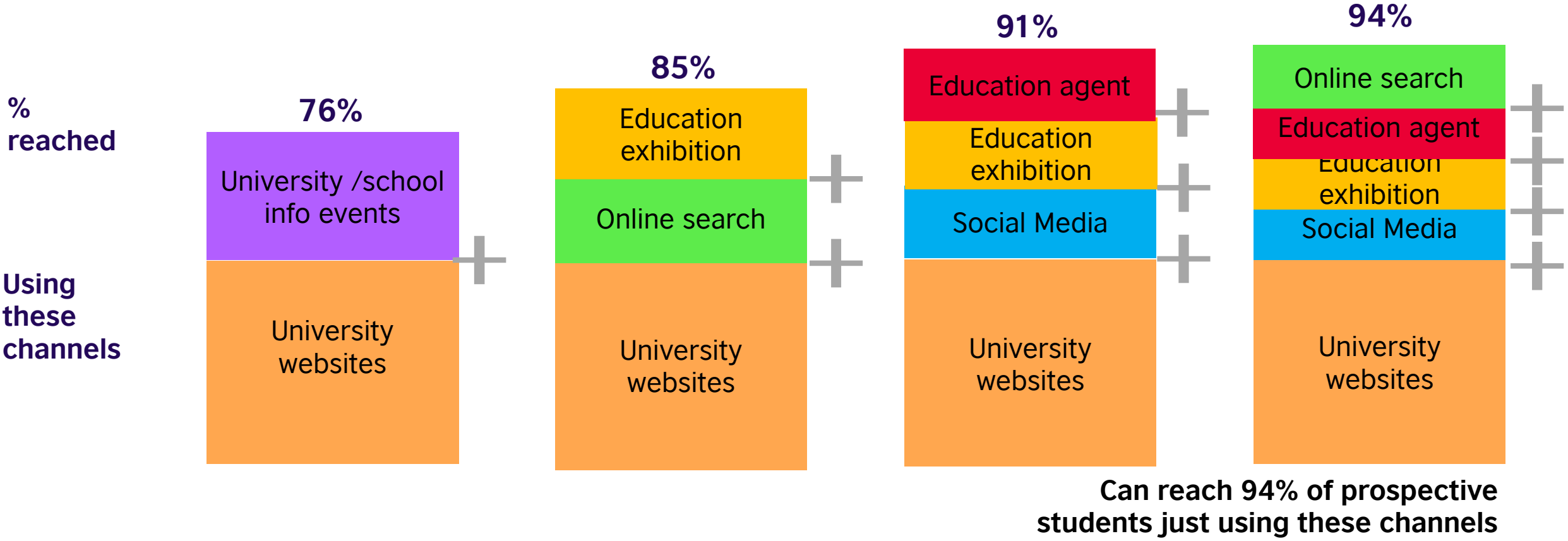
Have used/will use social media to explore their options to study abroad



## How are they using social media?

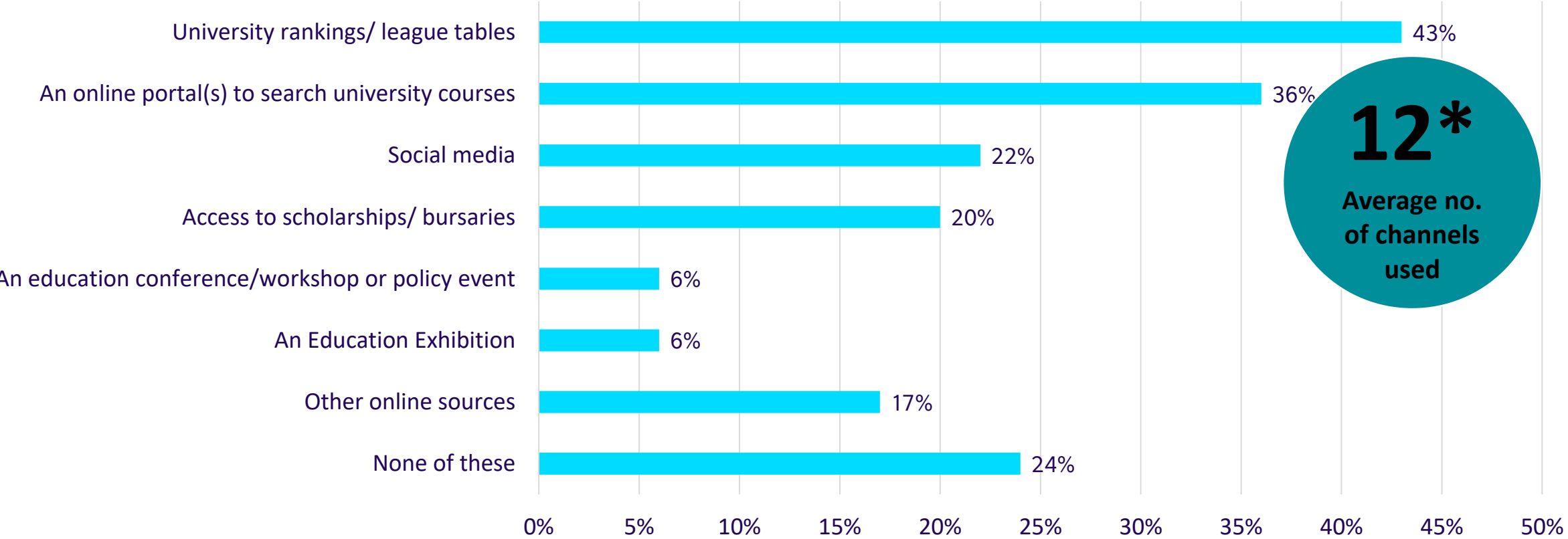
- Looking at posts from other students
- Looking at posts from other people living in that country
- Looking at posts from the university account

# But even excluding word of mouth, it's still possible to reach almost all students just through five channels



# Channels: which of the following information sources, events or activities were important influences on your decision to study in the UK?

Sample: EU, 780



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# Summary

- **4 in 10 students from the EU are less likely to consider studying in the UK because of Brexit**
- **Concerns around financial pressures (increase in tuition fees, living costs and health insurance)**
- **Alternative provision (transnational education, English-Medium Education) as well as alternative study destinations (Netherlands and Germany are the UK's main competitors from the EU).**
- **UK universities are advised to focus on what EU students value about UK PG degrees: one-year duration, high quality of teaching/university rankings, employability, English language exposure, proximity to home**
- **Promote through their webpages, info events, and peers.**

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# Germany

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# **Greece**

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# Introductions/Meet the Team

Maria Tsakali

Head Education

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Education Marketing Manager

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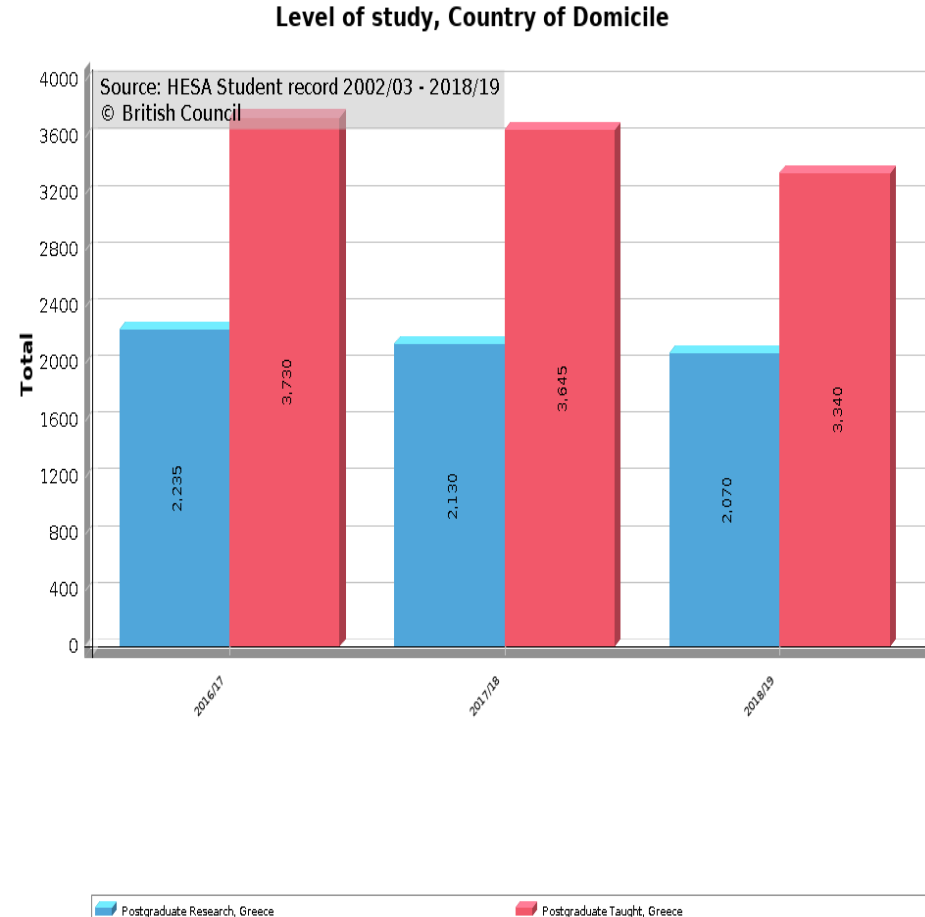
## Agenda

- Market trends & students' profile
- How to reach PG students
- Messaging
- Recommendations



# Setting the Context

- Greece Tertiary Education in numbers (,000): 426k UG students, 72k PG, 29k PhD (2018-19 ELSTAT)
- 37.5k Greeks study abroad (UG & PG) – top destinations 12k Cyprus, 10k UK
- Most popular subjects: Business, Engineering, Biological Sciences, Computer, subjects allied to medicine



# PG market in Greece: dynamics & trends

- Significant increase of PG programmes in Greece (1,000 programmes by Greek HEIS, 500 from private colleges and Cypriot Universities (140 English taught Masters, <https://studyinggreece.edu.gr/>)
- PG students increased by 25% (2017-18 v previous year)
- Greek HEIs with largest number of PG students: Hellenic Open University (20k), Kapodistrian University (13.3k), Aristotle University (5.3)
- Most dynamic professions in 2018: software designers & analysts, logistics, architects/city planners/topographers, professionals in the social and religious sectors:  
**Sectors:** Tourism and related sub-sectors hotels & restaurants (CEDEFOP/EU research for Greece)
- Professions of the Future: up to 2030, professionals in the tourism sectors, doctors and health professionals, chemists, physicists, professionals in the sectors of education, informatics and telecommunications (CEDEFOP/EU research for Greece)

# PG Student Profile & Scholarships

- **Audience:** Recent graduates from Greek HEIs, graduates from UK TNE programmes delivered in-country, working professionals interested to study a UK programme online / part-time to boost their career prospects
- September to December is the main application period for both UG and PG. Normally, less than 20% apply in January however,
- Due to Covid-19, a higher number of students postponed entry to January 2021
- **Why choose the UK?** The UK is well recognized in Greece for quality, culture, careers & job prospects; Employability opportunities & career prospects are the main motives; cost the main barrier
- Most scholarship schemes for 20-21 have completed their competitions and announced their results (<https://e-paideia.org/ypotrofies/>). A catalogue with upcoming opportunities, is available at <https://www.eduguide.gr/ypotrofies/exoteriko?page=3>

# Marketing Eco-System in Greece – headlines

- Active networks of agents, University Career Officers and UK Alumni and British Council is well connected with all
- Top two social media advertising channels: Facebook /5.5m, Instagram/3.10m (slideshare.net/DataReportal/digital-2019-greece-january-2019-v01)
- Greeks' trust on media: On-line incl. social media 95%; TV, 66%; Radio, 30%; Print media 26%
- Dedicated student channels exist within Universities and are accessible via University Career officers
- Seize opportunities to promote your programmes via education on-line events
  - <https://study-uk-events-eu.britishcouncil.org/> (mid Oct-mid Nov)
  - <https://www.iuf.gr/en/> (February 2021)
  - **Greece's bi-weekly education information webinars:**  
<https://www.britishcouncil.gr/en/events/education-information-sessions>

# Marketing Key Messages

- Clarify misperceptions on high tuition fees as a general rule as much as you can – provide average range of fees for taught and research programmes
- Provide concrete information on Scholarship opportunities or other discounts which reduce cost of study and make your course offer more attractive /financially affordable
- Highlight Graduate Route as much as possible – don't forget Greeks come to the UK to combine studies with post-study work opportunities
- Talk about work placement offers, internships, industrial linkages and job placement ratio from your university

# Marketing Key Messages

- Talk about National and international rankings
- Promote your Support services that your HEI can offer to students during job hunting under Graduate Route, Career Advice
- Highlight H&S provisions in your institution; demonstrate confidence that your institution is well prepared to deal with future waves of the pandemic; demonstrate ability to minimise disruption to programme delivery whilst maintaining a sensible balance between physical and on-line components of the programme

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# Conclusions & Recommendations

- The PG market for Jan/Feb intake is small yet it will re-act and be attracted to your offer if your proposition is financially affordable or provides means for financial support
- A large marketing campaign is not recommended unless it is intense, over a short period of time and focused on two main cities, Athens and Thessaloniki (cost of a decent campaign will range between 3 to 5k GBP)
- A targeted campaign via networks of local multipliers is highly recommended; if you have established relations with experienced local agents, do liaise with them to give you access to UG students of local HEIs; if you don't contact us
- Explore opportunities to speak directly to PG students (student events organized by agents or us)
- Other bespoke marketing opportunities that we can customize to your objectives and preferred timeframe (digital campaigns, subject specific webinars)
- Messages - key pillars: Quality of education -Job opportunities- Financial Support

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# Thank you for joining us today!

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## G20+ Summit Europe Session

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**Thank you for joining, this session has now ended.**

International Education Services