

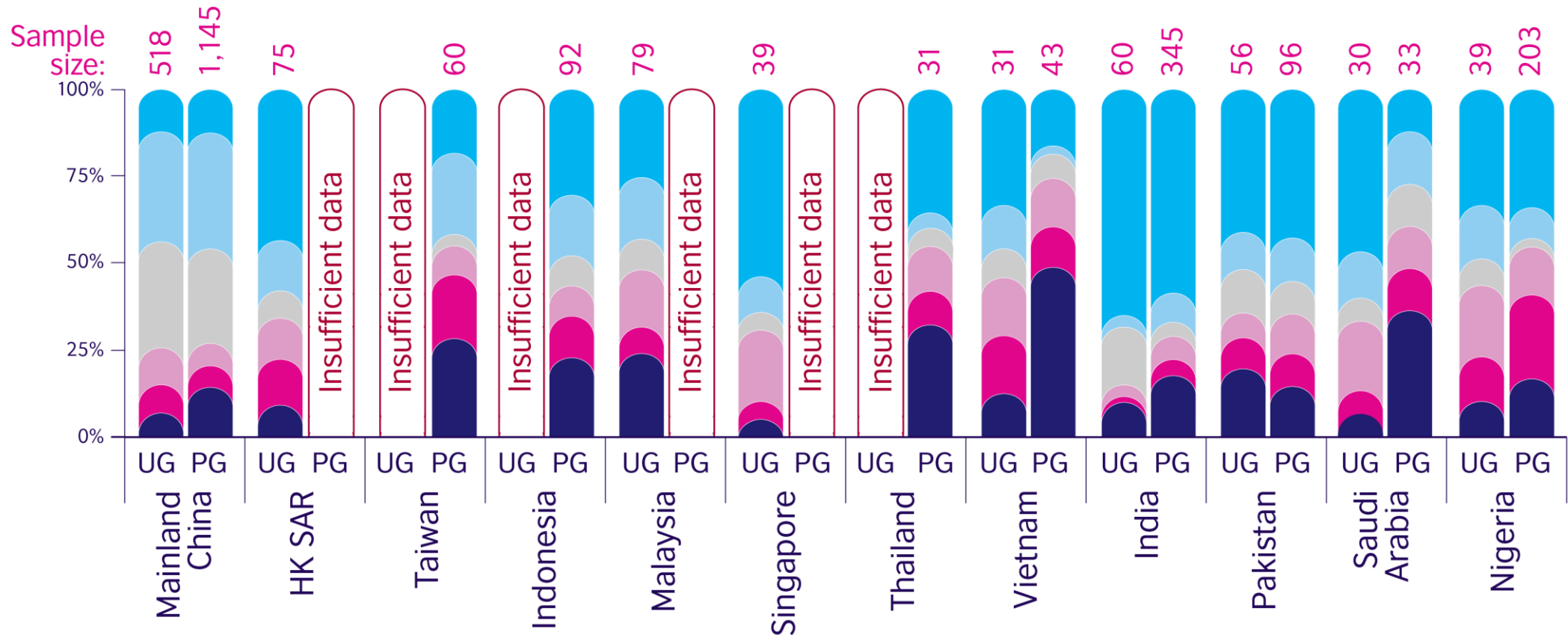
British Council G20+

East Asia

Wednesday 7 October

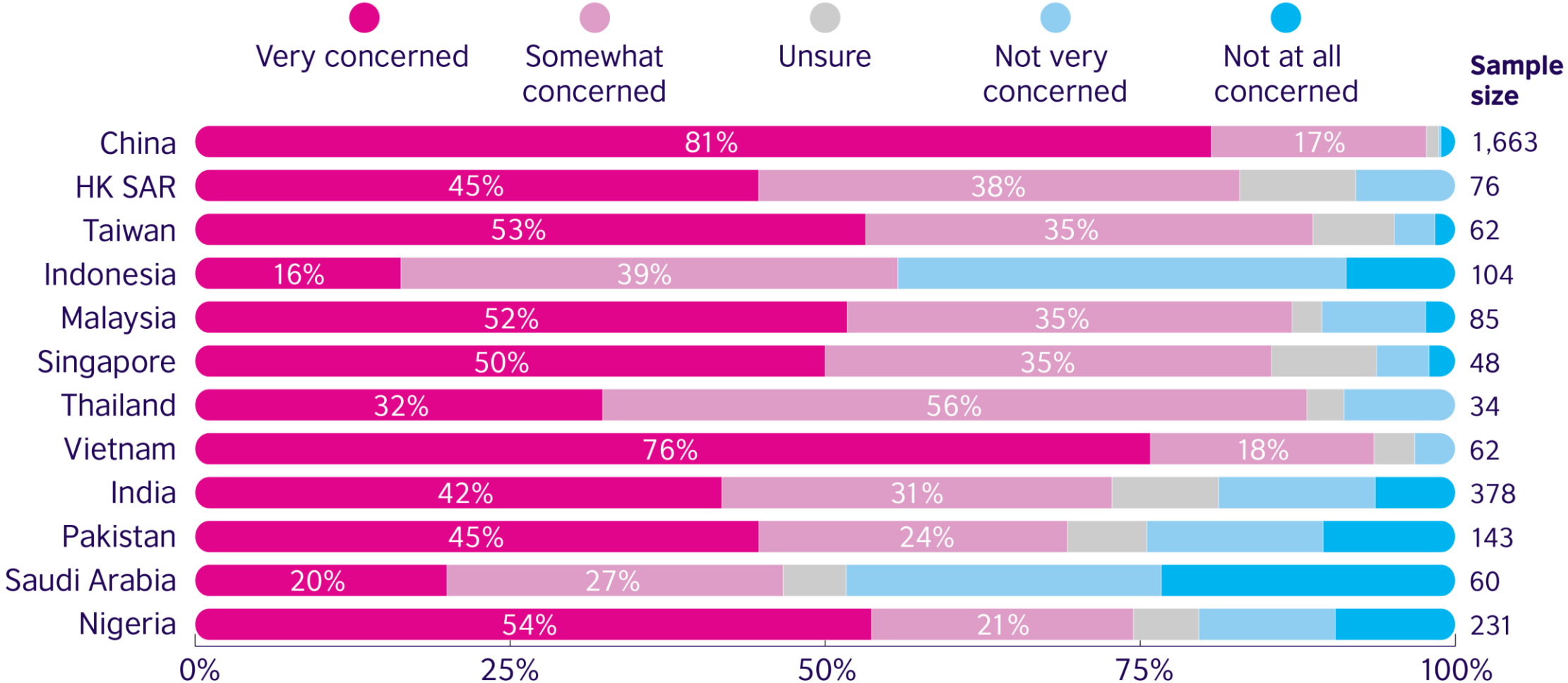
Q: How likely are you to cancel or delay your plans to study overseas for the 2020/2021 academic year?

- Not at all likely
- Somewhat unlikely
- Neither likely nor unlikely
- Somewhat likely
- Very likely
- I have already cancelled



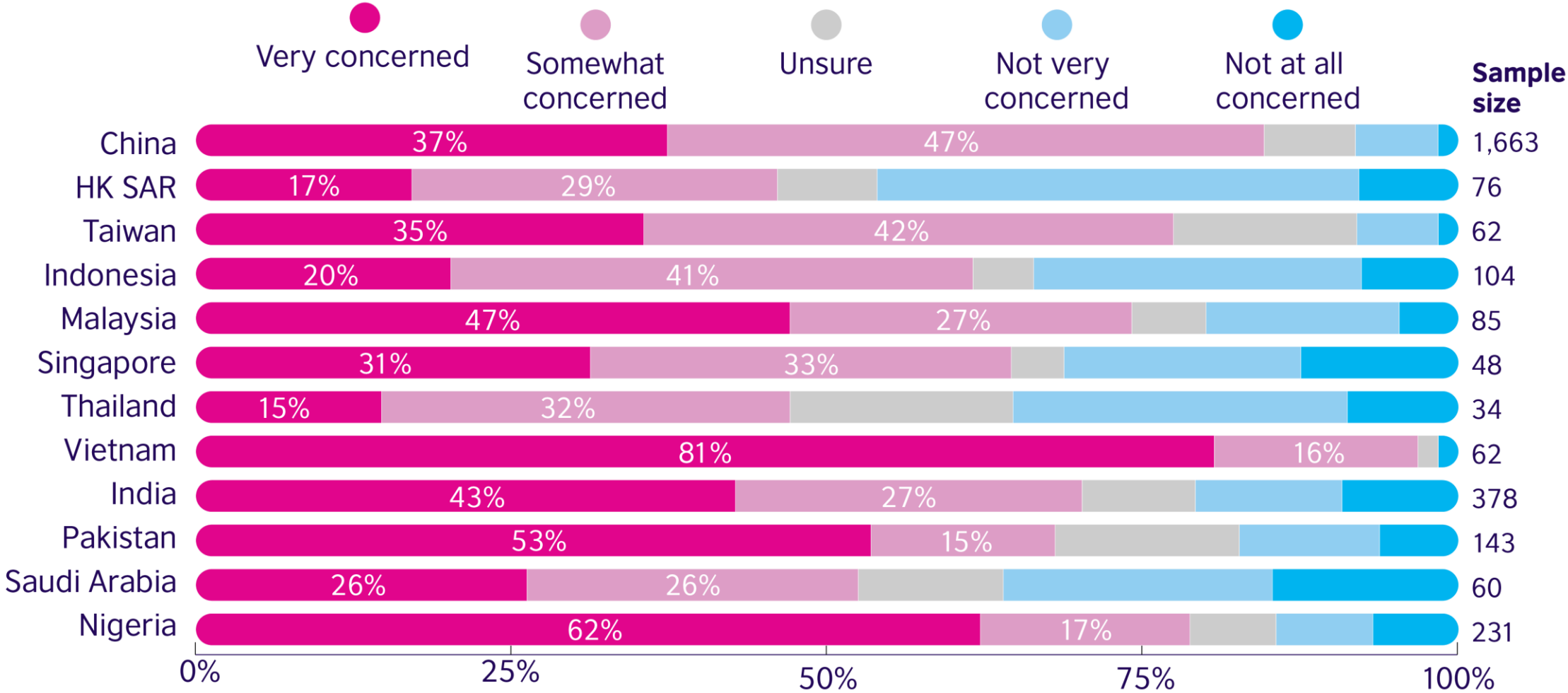
Q: When considering your plans to study abroad, how concerned are you about the following issues?

Health and wellbeing



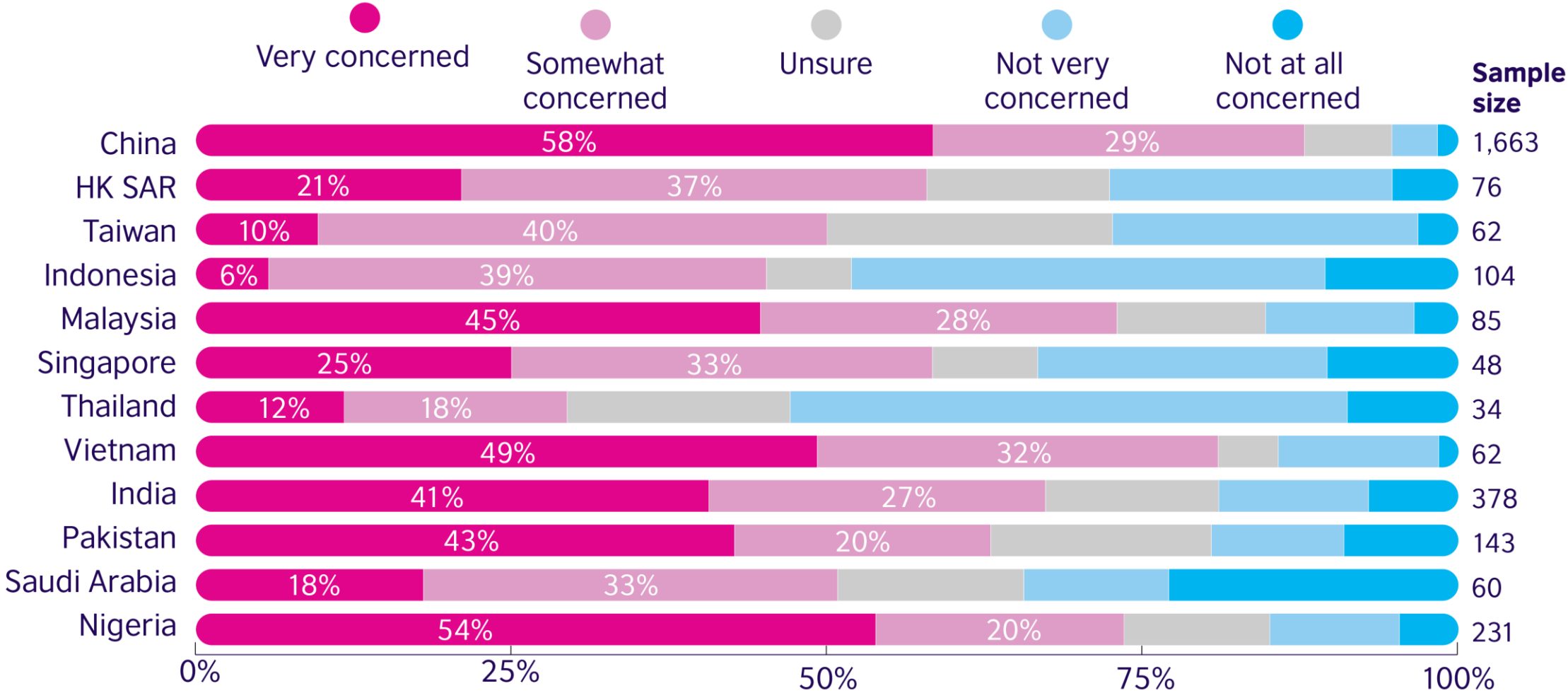
Q: When considering your plans to study abroad, how concerned are you about the following issues?

Finances



Q: When considering your plans to study abroad, how concerned are you about the following issues?

Flights



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China

China

Opportunities

- The UK surpasses the US becoming the most preferred destination for Chinese students studying abroad
- China's Ministry of Education priorities
- Employability a continued priority

Challenges:

- Challenging job market
- Adapting marketing messages and channels

China

Subject interests:



Medical science & public health



Engineering & Technology



Education



Creative arts & design



Basic sciences



Business & administrative studies



Media & communications



Computer science



Law



Architecture

China

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China

China job market

Industries

- Artificial intelligence
- E-commerce
- R&D

Soft skills

- Regional experience
- Cross-functional communication
- Technical upskilling

Employers

- Candidates with both local and international experience
- Attractive offers to repatriate overseas Chinese
- Tier 1 salaries and benefits becoming more globally competitive

China job market

Covid-19 impact

- **Problems face by graduates:**
 - Companies postponing / cancelling recruitment
 - Fierce competition
 - Companies not managing virtual recruitment / interviews well
- **Civil service applications expected to rise along with application for SOEs**
- **“Stability” jumped from fifth in 2019 to second in 2020 in the top five factors most valued by fresh graduates**
- **Fresh graduate salary expectations have dropped from 2019**

China

Opportunities

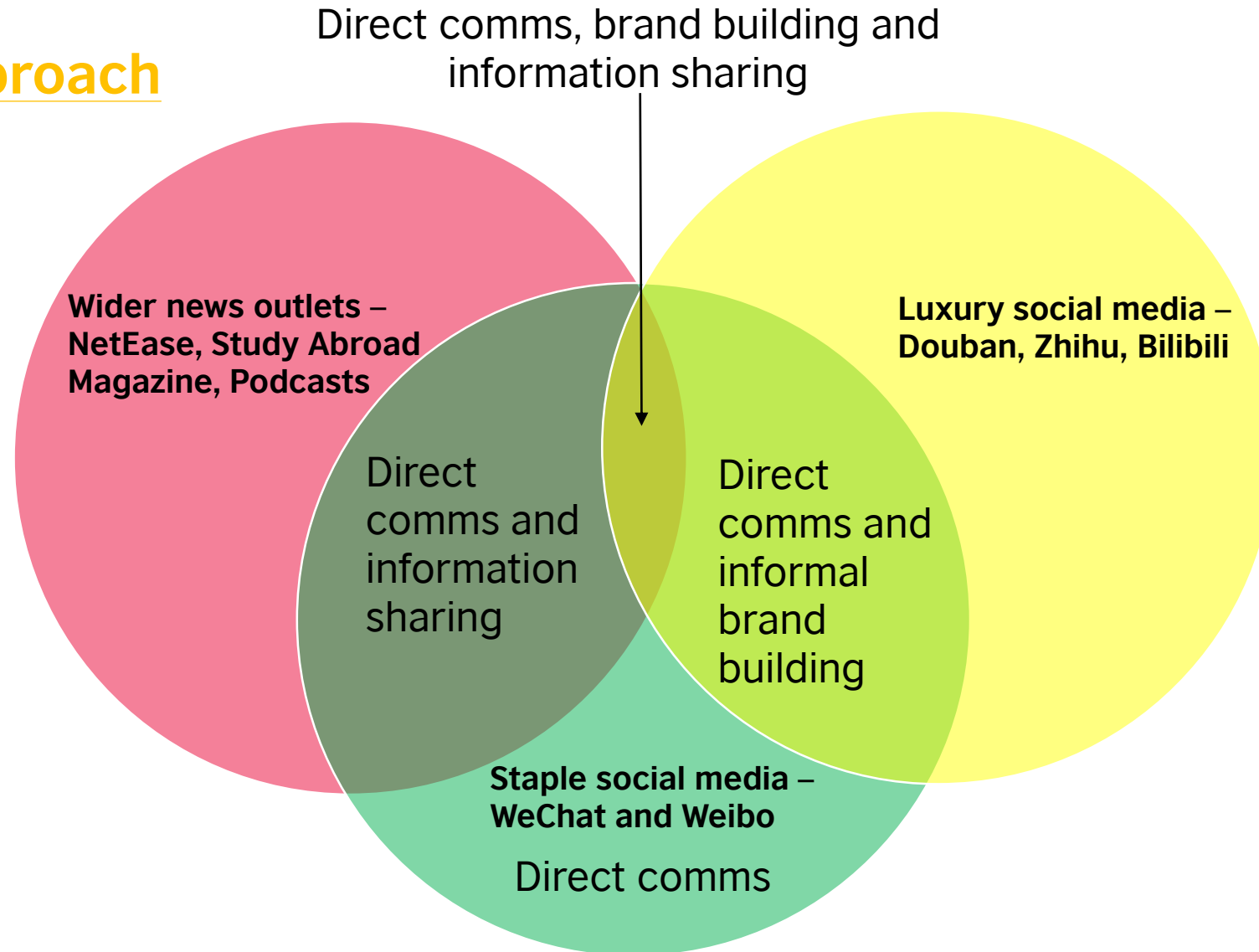
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China

Marketing approach



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Hong Kong

UK BNO offer creates spike in HK interest

Posted on Jul 21, 2020 by Viggo Stacey

Posted in [Agencies](#), [Government](#), [Immigration](#), [News](#),
under [Asia](#).

Tagged with [Hong Kong](#), [UK](#).

[Bookmark the permalink.](#)

The UK's announcement to grant British National Overseas passport holders in Hong Kong five years leave to remain with work and study rights has been welcomed by agents in the region, who report immediate interest spikes from students and families.

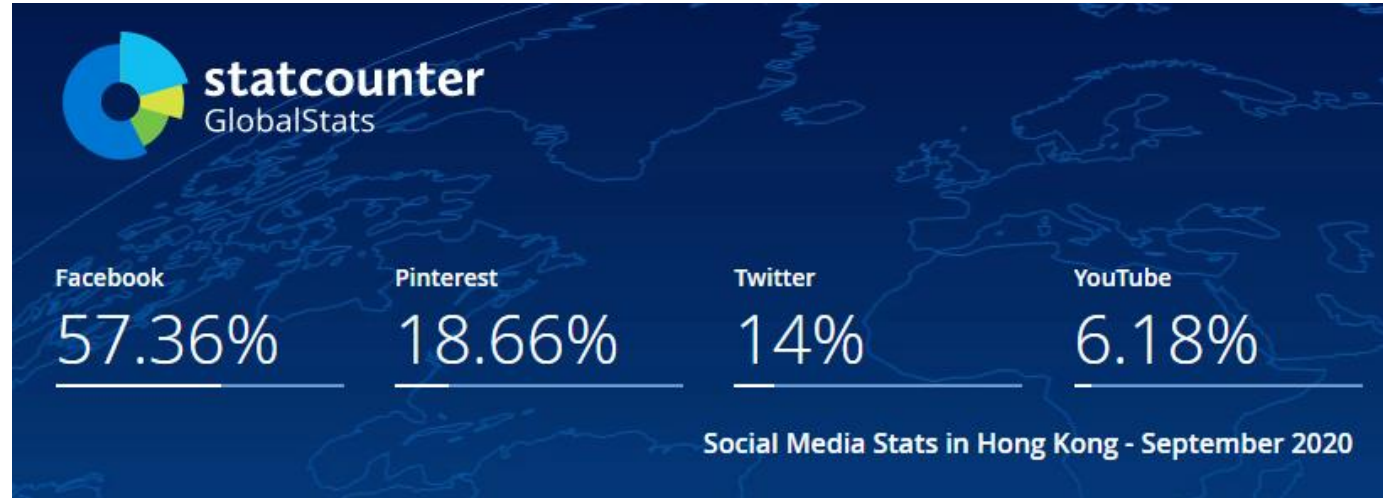
[Hong Kong](#) / [Education](#)

Tough ride ahead for Hong Kong graduates, as job vacancies fall 55 per cent amid economy battered by protests, pandemic

- Major online employment portals show openings for new entrants down sharply in early 2020
- This year's graduates likely to take longer to land full-time work, for less pay too

Hong Kong

Marketing channels

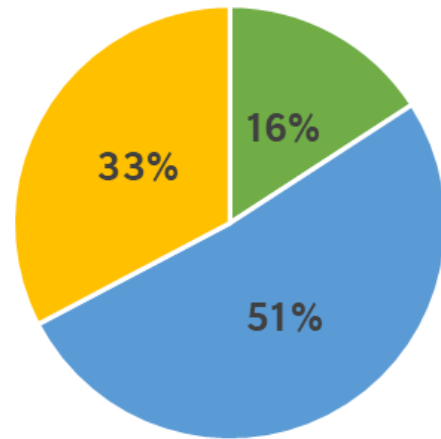


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Thailand

Thailand – the market

Top five most popular subject areas for Postgraduate Taught courses



- Postgraduate Research
- Postgraduate Taught
- First Degree and Other Undergraduate

1. Business & administrative studies

2. Law

3. Engineering & technology

4. Social studies

5. Creative arts & design

Source: HESA Student record 2018/19

Thailand – the update

- **January 2021 vs. September 2021 entry**
- **Government scholarships remains available**
- **New minister for Higher Education and Science newly appointed**
- **One-year master's degree and employability remain the key drivers**
- **Skills highly demanded: Big Data and Digital Marketing**
- **Digital media remains popular but the success factor is 'Contents'**

Telling stories and review

📍 บันทึกการโดนกักตัว14วันที่เกาหลี

วันที่1 : มาถึงสนามบิน ตอนแรกจะนั่งแท็กซี่ไปที่หอ แต่มหา
ลัยมีรถมารับถึงสนามบินและเราโชคดีได้ขึ้น(เพราะไม่ได้แจ้ง
ไว้) เขากันระหว่างคนขับกับเราแบบนี้เลย จะโดนกักเดี่ยว ห้าม
ออกนอกห้อง ข้าวอร่อยใช้ได้เลย



6:05 pm · 29 Feb 2020 · Twitter for iPhone

29K Retweets 39 Quote Tweets 5K Likes



-ปักเพลง 🌻💜 @parkpleng_ · 1 Mar

Replying to @parkpleng_

วันที่2 🌻 วันนี้ตื่นมาพร้อมกับอาหารเข้ามาเสิร์ฟหน้าห้องไว้มาก นั่งมองวิวตึกเรียน
จากหน้าต่างห้องก็เพลินๆดี วันนี้เขามาแจกใบที่บอกว่าหอสมุดมอมีหนังสือให้ดูฟรีด้วย
ประทับใจ 😊



1

1.6K

252

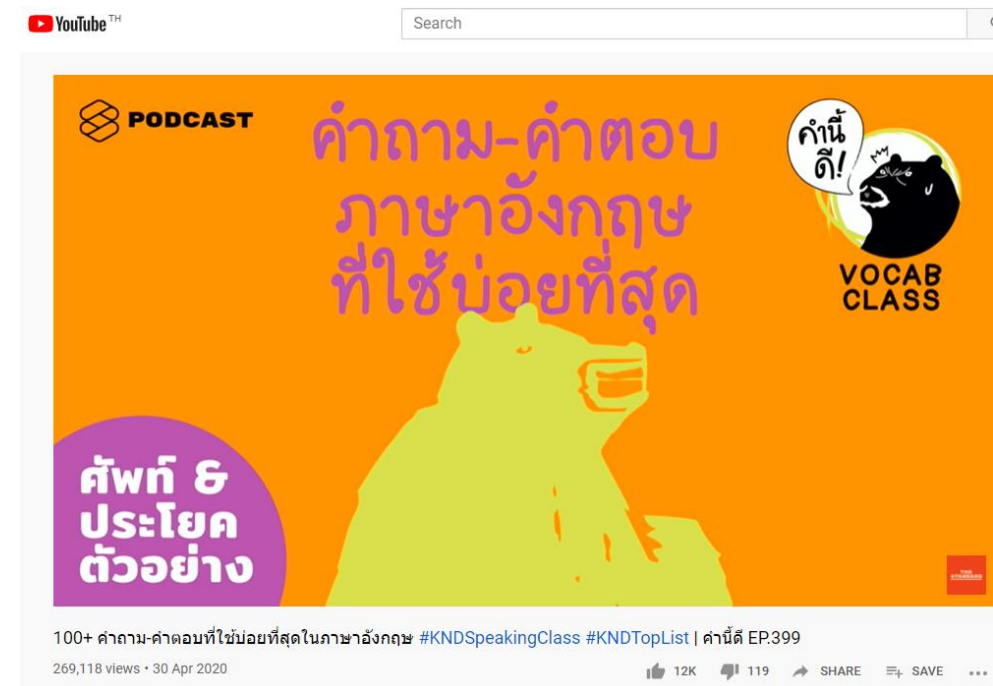


New media: podcast



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Source: <https://www.krungsri.com/bank/th/plearn-plearn/interest-podcast.html>



Source: <https://soundcloud.com/missiontothemoon/ep2> & https://www.youtube.com/watch?v=CC1_cTsgtQ8

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South Korea

South Korea

Opportunities



**Competitive
Job Market**

**US Losing
Popularity**

**More Spare Time
in the Evening**

South Korea

Challenges



**Higher ROI
Sensitivity**

**Low Demand for
Study Abroad**

**Blind Hiring for
Employers**

South Korea

Subject Interests



Arts & Design,
Social Studies,
Business

Computer
Sciences
**(Korean Digital
New Deal)**

Green Energy,
Climate Change
**(Korean Green
New Deal)**

South Korea

Marketing Channels

Local Online
Portal



Working
Professionals'
Online
Community



Self-
Development
Content

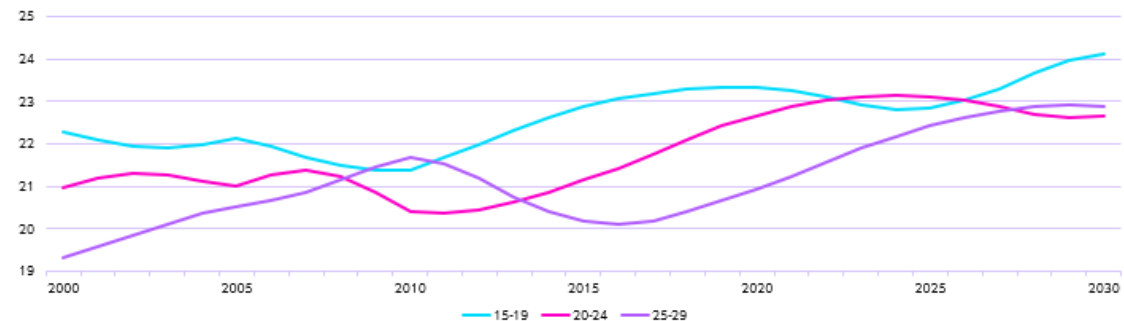


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Indonesia

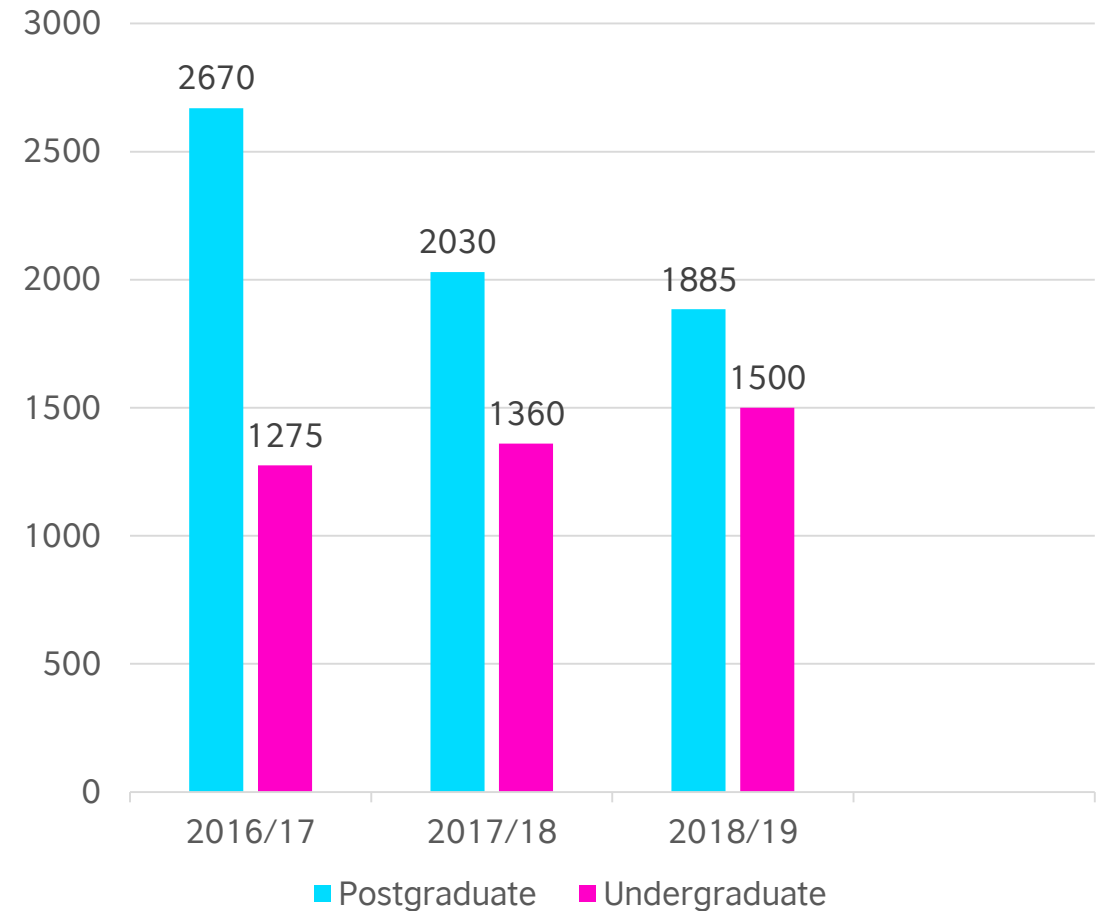
Indonesia – the PG premise

- 4th most populous
- Increasing student demographics
- 17000 islands – 3 time zones – 500 plus dialects
- T1 and T2 regions
- Traditionally PG & scholarship driven
- 4000+ HEIs – 48% accredited



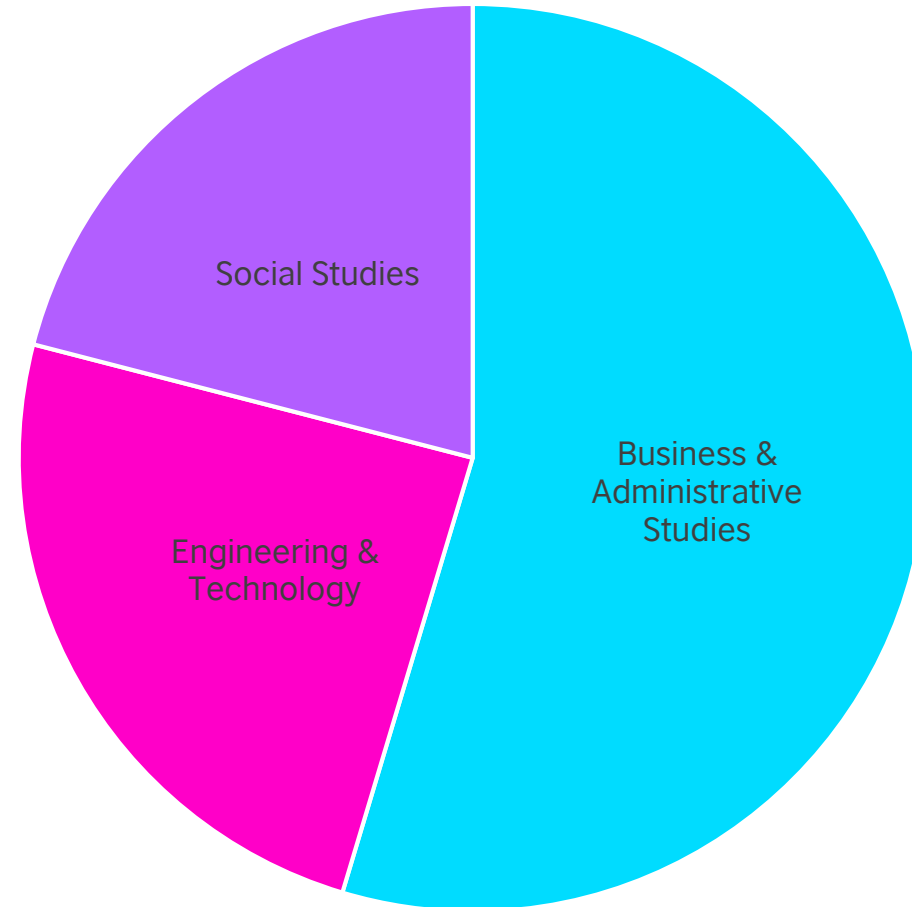
International recruitment: stabilising and growth oriented

- Funding led nose-dive for PG in 2017
- PG driven and UG growth
- LPDP vs Self-financed
- Getting back on trend



Drivers for subject choices - 1

- Top subject choices for PG applicants: *Business & Administrative Studies, Engineering and Technology – digital technology, renewable energies, Social Studies*
- Professional development
- Employability – *placement, graduate route, industry linkages*
- Finance & competition



■ Business & Administrative Studies ■ Engineering & Technology
■ Social Studies ■

Drivers for subject choices - 2

- Government priority areas for development
- Digital economy boom: *Indonesia slated to be the biggest digital economy in region*
- Home to 4 of the Top 10 Unicorn companies

Scholarships:

- *LPDP - on hold*
- *Corporate funding/HR*
- *GREAT Scholarships*
- *Chevening*

Recommendation:

- *Promotion for self-financed PG students*

Government plans for 2020 – 2024 include: ***Increasing relevance & competitiveness of HE***

- **Triangle of collaboration: university-industry-government**
- **Adoption of technology for learning innovation**
- **Study programmes – adaptive to industry needs**
- **Higher education as science and technology development and centre for excellence**
- **Increase research and publications**
- **Improve quality of university graduates**

Government priorities – *defined*

- Development of human resource
- Education – training of faculty, development and collaborations
- Improve and increase PhDs
- Expand research collaborations
- Development geared towards sustainability
 - *food security*
 - *social entrepreneurship*
 - *engineering & renewable energy*
 - *digital transformation*
 - *medical science/allied health*
 - *maritime*
 - *social sciences*
 - *creative industries*

Insights from the field

Student plans for 2021:

- Anticipated increase – January and beyond
- Major worries: pandemic in UK, costs, discounts for online study, IELTS/alternative institution arrangements
- Current focus: business, engineering, fintech, chemical renewables, AI, design, game designing, digital media
- Regional TNE

Recommendations to maximise potential recruitment

- Consider costs – online/F2F, payment plans, accommodation discounts
- Scholarships
- Alternative language assessment alternatives
- Importance of staying visible
- Improve response time and be available
- Consider increasing subject availability for January in line with September

Steps we must ensure:

- ✓ Aware of the prospective interests
- ✓ Maintaining sustained contact and visibility
- ✓ Announce solutions for concerns identified
- ✓ Providing incentive – *invite* interest and engagement
- ✓ Optimise alumni & agents
- ✓ Don't forget competitors
- ✓ For PG don't just rely on LPDP
- ✓ It's a matter of time!

Challenges to navigate

- **LPDP scholarships – *delayed due to pandemic***
- **MORA – *finding and supporting the right candidates/applicants***
- **Financial aid/institution scholarships - *incentivise – possible reduction in tuition fee for on-campus and distance learning***
- **Expenses are a major factor – *being catered to by competition***
- **The January intake – *providing more subject options like September***
- **Strong competition and visibility by competitor study destinations**

Available effective platforms for outreach

- Digital media
- Social media influencers
- Industry/employer linkages
- Your alumni and agent networks

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Thank you!

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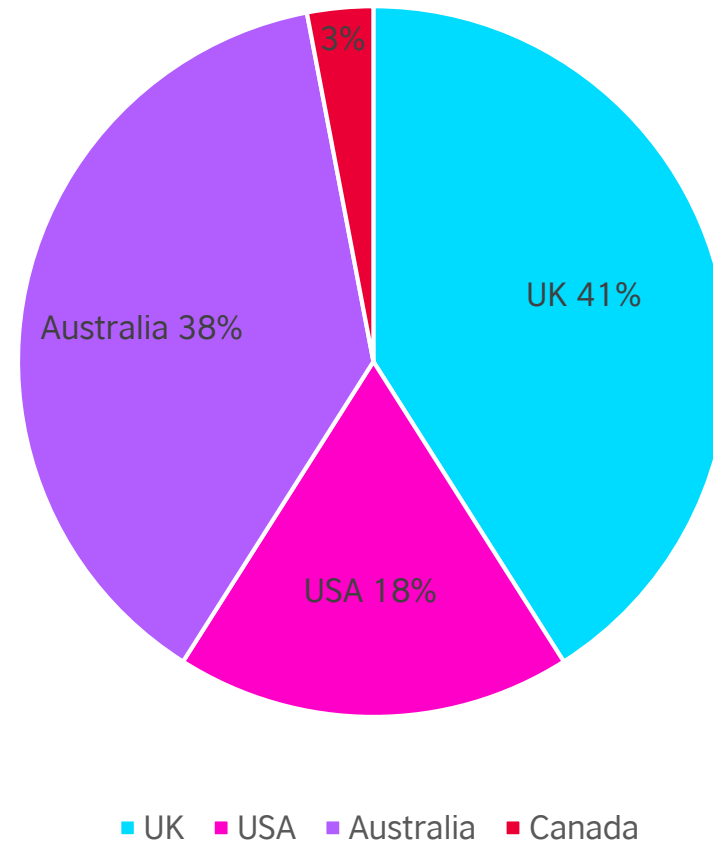
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Malaysia

Malaysia – the market

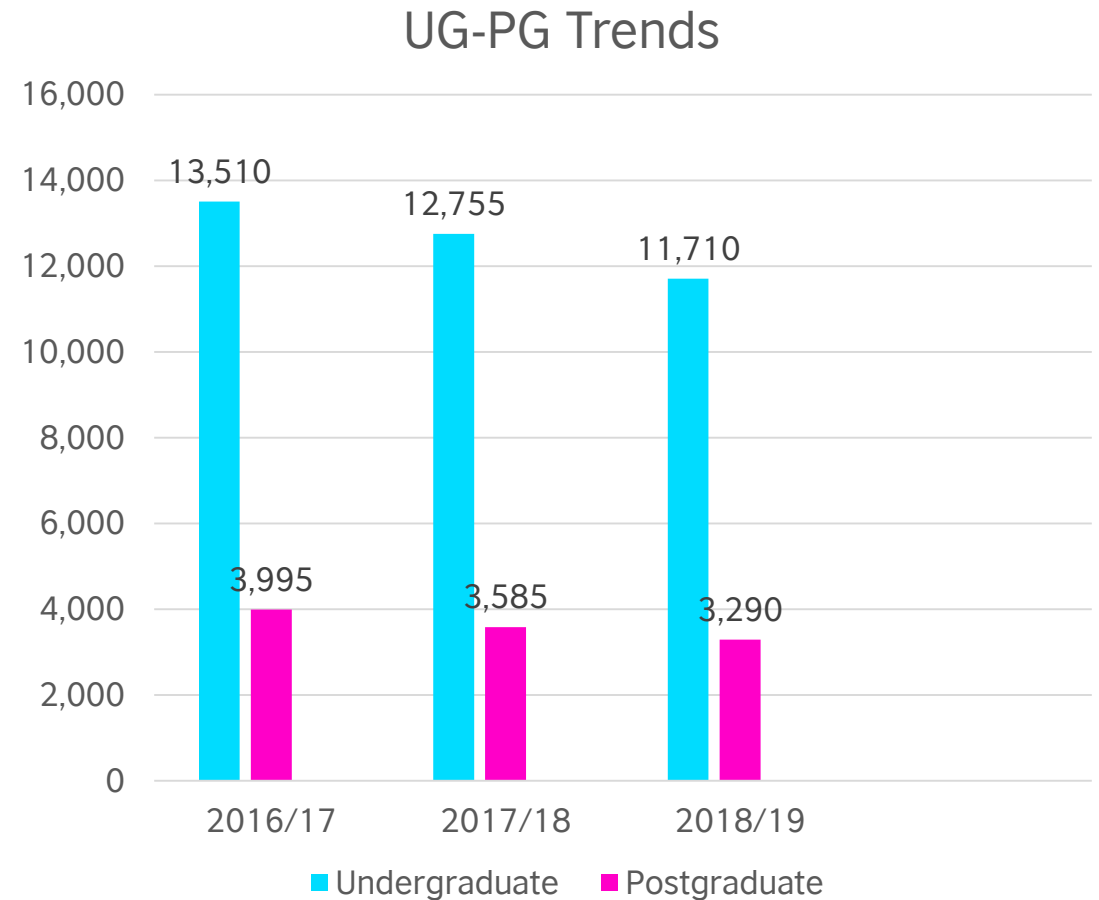
- A mature market: *internationally, regionally and locally*
- Developed pathways – spoilt for choice - *local + international options*
- Extensive government investment in education
- Regional hub ➡ international hub
- New government since March 2020

Market share



International recruitment for UK

- Predominantly UG led – *so why are we here?*
- PG holding more steady – with slight decline
- 2020 dynamics – post pandemic:
 - *drop in international acceptances?*
 - *gap year/work experience?*
 - *local provision + TNE?*
 - *late start?*
- Potential for future increase in PG



Malaysia in 2020 – *the post pandemic scenario*

- **Government policies:**
 - *response to pandemic*
- **TNE – *globally endorsed by QAA/MQA***
- **Local HEIs: *rankings, partnerships and articulation***
- **Branch campuses (offering both UG & PG)**

What will be the driving factors now?

- **Employability/appeal of industrial placement**
- **Graduate route**
- **1-year PG degree**
- **Scholarships/finances**
- **Niche subject specialisations & excellence**

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Subjects PG	2016/17	2017/18	2018/19
Business & Administrative Studies	730	660	595
Engineering & Technology	730	580	485
Law	400	455	455
Biological Sciences	310	285	270
Architecture, Building & Planning	270	245	270

Niche specialisations & sectors

- Major player in ASEAN
- Expanding finance/fintech sector
- Aggressive education agenda
- Extensive international provision
- QS Asia = 5 in Top 50
- Geared to increase research & international collaborations

Govt direction:

- Infrastructure development
- ICT – Industry 4.0
- Digital Communications
- Bio-technology
- Finance
- Tourism and hospitality
- Creative industries
- Employability/job creation/entrepreneurship

The Malaysia Education Blueprint – *the 10 shifts*



New government – immediate concerns/focus – open for collaborations

- **Entrepreneurship – *boost employability***
- **Capacity building – *digital education – teaching and learning***
- **Enhance graduate employability**
- **Expand research output**
- **Increase PhDs**
- **TVET**

Priority sectors of development:

- ***Social entrepreneurship***
- ***Industry 4.0***
- ***Digital technology***
- ***Fintech***
- ***Creative Industries***

Challenges to expect and navigate

- Upcoming PG intakes *may feature students already in UK*
- UG/credit transfers – *will remain a focus*
- PG applicants – *often funding reliant*
- Main concern: *well-being*
- Visa concerns
- Logistic/travel concerns
- Family economics

What can UK institutions do

Capitalise want for ‘full experience’

Be agile and ready to change

Maintain sustained comms

Consider cost factor

- **Scale of flexibility/entry requirements**
- **General generic promotion does not sell**
- **Professional courses in focus**
- **Communication/messaging: employability, scholarships**
- **Alumni successes/testimonials**

Effective outreach and channels

- Digital media: deliberate messaging catering to circumstances and audiences
- Industry/employer linkages
- Alumni success stories
- Agents networks

Study Abroad | Begin Your UK Education Path | Study UK Malaysia Fair
Ad www.britishcouncil.my

Find out from 40 participating institutions at the education fair. Affordable, world-class, and suitable UK qualification for your career ambitions. Study UK. Art. Law. Engineering. Types: Application Tips, Career Advice, Study UK Malaysia

Study UK - British Council

Do you have a burning passion for science? Some of the world's most exciting inventions took place in the UK. Two students at Loughborough University recently picked up the James Dyson Award for their inner-city wind turbine design. Could you be the next UK-based innovator? Discover more about studying science in the UK: <http://bit.ly/2s9zd94> #StudyUK #DiscoverYou #StudyScience



Thank you!

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Vietnam

Agenda

- **Market at a glance**
- **Understanding your Vietnamese prospective students**
- **Market trends, opportunities and challenges**
- **Marketing your institution**
 - *Direct recruitment channels*
 - *Marketing case studies*
 - *Recommended approach*

Market at a glance

Economic overview

- GDP growth rate in 2019: 7%; in 2020: 1.81% (estimated)
- Important free trade agreements (EU-Vietnam; ASEAN Economic Community, CPTPP)
- Middle income class accounts for 13% of the population (expected 26% by 2026)
- A star in Covid-19 fight

Education market

- By 2019, Vietnam has 237 universities (public: 172, private: 60, foreign-invested: 5), of which 140 provide PhD training and 180 provide master's training;
- About 1,500 PhDs and 36,000 Master's graduate every year;
- Nearly 550 TNE programmes between 85 Vietnamese universities with 258 foreign partners (18,000 bachelor, 28,000 master's and 60 PhDs students have graduated). UK TNE: over 60 programmes
- 35 advanced training programmes; 60 high-quality programmes and 16 high-quality engineers training programme

(Source: MOET report of school year 2018-19)

Market at a glance

- Vietnamese parents tend to send their children to study abroad at an earlier age. Once finishing a bachelor degree, students tend to keep studying further for a master's
- Low training quality and relaxed management of master's training programmes delivered by local universities led to a high interest of pursuing master's abroad
- Increasing number of international and joint-training master's programmes in Vietnam, especially MBAs (*CFVG: cfvg.org; Solvay Brussels School Vietnam: <https://solvay-mba.edu.vn/>, ...*)
- Vingroup offers scholarships to train master's and PhDs abroad and in country in fields of science and technology, engineering and medicine
- Stronger promotion of master's courses at European countries (Germany, France, Ireland, Italy...), and other countries in the region (Japan, Korea..). Vietnam is in top 20 countries receiving most Erasmus scholarships in 2020.

UK education market in Vietnam – a snapshot

- Tier 4 visa in 2019: a bounce back with **9.4%** increase (*UKVI*)
- The North of Vietnam (mainly Hanoi): main market, accounting for 60% of total Tier 4 visa (*UKVI Vietnam 2019*)
- UK market share among English speaking countries: **7%**
- Vietnamese enrolment in UK HEIs 2018/19: **3,565** (equally divided between undergrad and postgrad) (*Source: HESA*)
- Business and administration subject dominated (over 65%), noticeable increased enrolment in education and law (*Source: HESA*)

Top players in postgraduate recruitment market:

- Nottingham Trent University
- University of the West of England
- The University of Huddersfield
- Bournemouth University
- The University of Greenwich

(*Source: HESA, 2018/19*)

Their common “recipe”

In-country
representative

+

University partnership

UK postgraduate market - Understanding your Vietnamese prospective students

Generation Z – Fresh Graduate

GEN Z

Generation Z is defined as young people whose birth year belongs to the second half of the 1990s until the early years of the 2000s (about 1996 to 2001).

Generation Z reaches adulthood when the world enters 2020 and is capable of officially participating in the labor force. In Vietnam, by 2025, Generation Z will account for about 25% of the workforce, equivalent to 15 million people.

Generation Z was born and grown in the Age of Technology, with outstanding applications of the Internet, mobile devices, social media, etc. This shaping the traits and changing consumer as well as the work behaviors of Generation Z compared to previous generations.

Their characteristics

1 High energy level, enthusiasm & dynamism

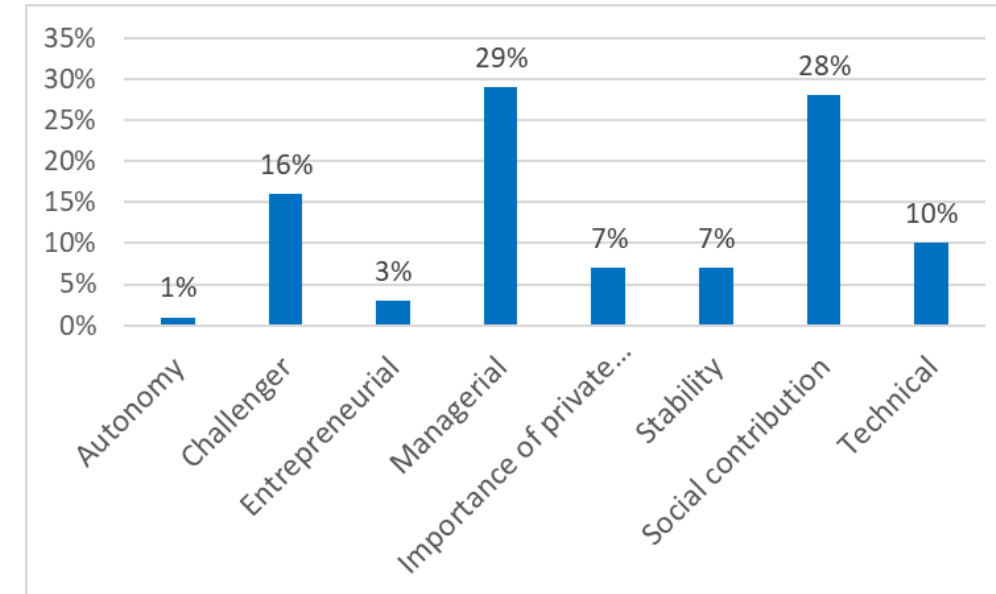
2 They have great expectations for advancement and professional development

3 They are willing to take on challenges and pressure at work

4 They are skillful in communication and have the ability to express sympathy

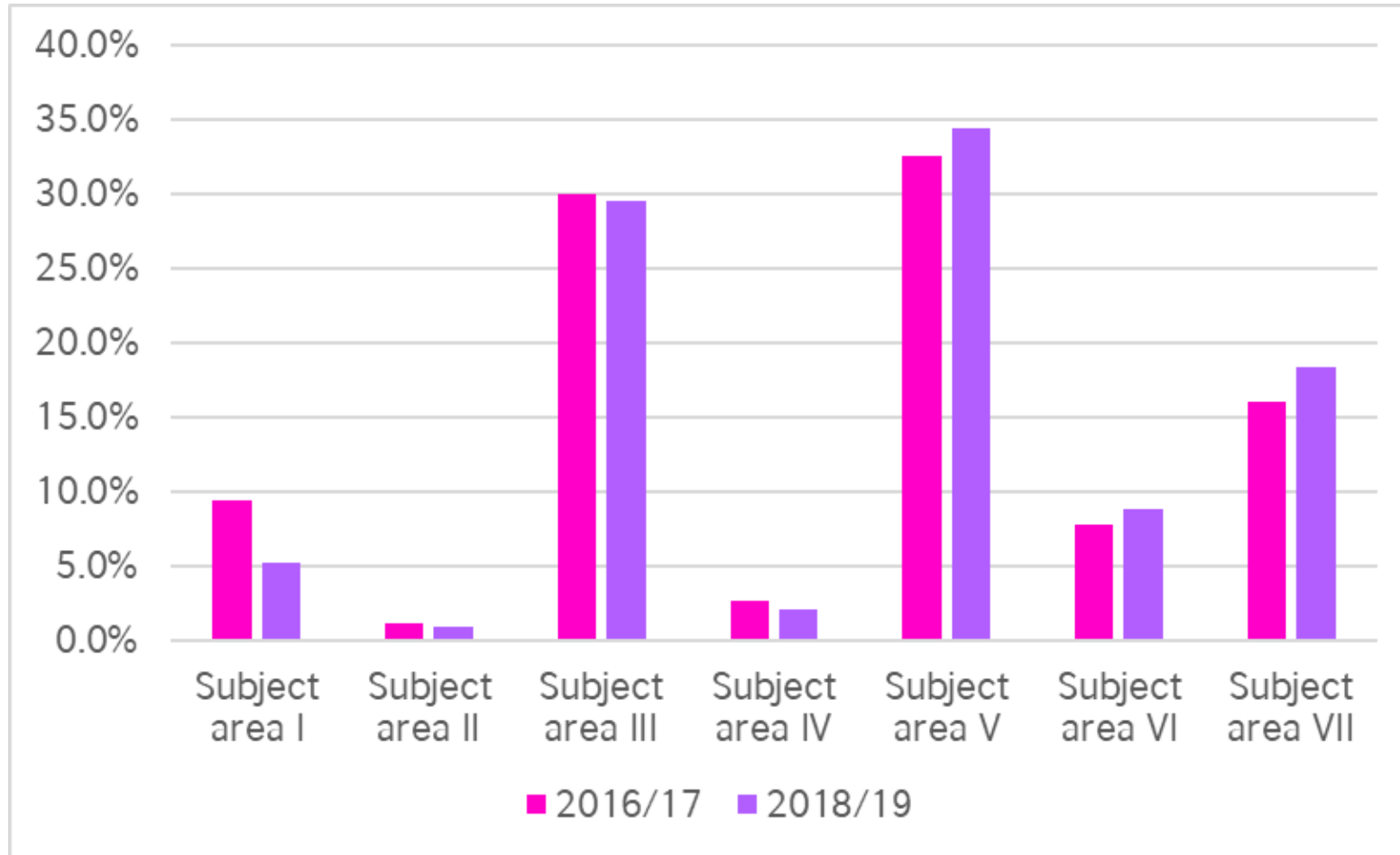
5 Because they do not have much experience, they are indecisive in action

Their career orientation



Source: Report “**Generation Z – Fresh Graduate: The Characteristics and Career Orientation – August 2020**” (Navigos Group – Vietnamworks)

Subject choice of Vietnamese undergrad students



Code	Subjects
Subject area I	Education science and teachers training
Subject area II	Arts
Subject area III	Business, management and law
Subject area IV	Life & natural sciences
Subject area V	Maths, IT, Technical Engineering, Production, Civil Engineering, Agriculture
Subject area VI	Health
Subject area VII	Social sciences, Communication, Social services, Tourism and Hospitality, Logistics, Environment

Source: Higher Education Report 2018-19, MOET Vietnam

Which universities do your students come from?

Public universities	Private and international universities
Hanoi	
Vietnam National University Foreign Trade University National Economics University	British University Vietnam
Ho Chi Minh city	
Vietnam National University Foreign Trade University Banking University University of Economics University of Economics and Law	RMIT Vietnam (<i>also have Hanoi campus</i>) Hoa Sen University Hong Bang University University of Economics and Finance
Danang city	
University of Economics University of Foreign Languages	Vietnam-UK Institute Duy Tan University
Mekong region	
Can Tho University (Can Tho city)	

Which universities do your students come from?

Students from “special” bachelor programmes offered by local public universities have potential to study further:

- **Advanced training programmes:** undergrad programmes using imported foreign curriculum, taught 100% in English, financial support from MOET
- **High-quality training programmes:** undergrad programmes taught partially (at least 30%) in English, no financial support from MOET
- **Joint training undergraduate programmes:** undergrad programmes developed in partnership with foreign universities, taught 100% in English, high tuition fees

What the education agents say...

At master's level, **only 30% of students care about ranking**. Most of them just need a course that matches with what they studied at undergraduate level and fits with their budget. They simply want to have **experience of studying in a foreign country**...

There is a trend of studying a second master's in the UK to catch the **New Graduate Route**

A growing interest in IT, Data science, Media, Engineering, Education, TESOL, Event management, Curating arts, Hospitality...

Recommendation from friends or teachers are important in their decision making process. Only a small number do self-research, others depend a lot on advice and information provided by **agent counsellors**.

Vietnamese students are very interested in having **internship opportunities** (not necessarily paid work placement). If UK universities can provide good support in this field, and together with the New Graduate Route, UK master's programmes will be 'leading' the student recruitment market in Vietnam...

UK postgraduate market - Market trends, opportunities and challenges

Market trends

Việt Nam puts priority on artificial intelligence development



Recruitment demand in IT industry quadruples

Vietnam to approve national strategy on digital technology business development soon

“... the recruitment demand of the IT industry has quadrupled after a decade, with biggest demand in the field of software development...”
<https://vietnamnews.vn/society/717881/recruitment-demand-in-it-industry-quadruples.html>

“The Ministry of Planning and Investment planned to expand the network of Vietnamese AI experts in other countries and establish a global fund to train high-quality human resources for the industry”.
<https://vietnamnews.vn/society/534918/viet-nam-puts-priority-on-artificial-intelligence-development.html>

“...by 2025, the country aims to have 70,000 digital technology firms; train a workforce of 1.2 million for digital technology”.
<https://www.vir.com.vn/vietnam-to-approve-national-strategy-on-digital-technology-business-development-soon-78760.html>

Market trends

- Many public and private universities launched new majors in this school year, especially in the field of science and technology such as *data science (including AI), electronic engineering, biomedical engineering, biotechnology, medical physics.*
- Vietnam is to have the first University of Health Sciences
- Vietnam National University (VNU-Hanoi) launched 8 new majors in Management of Non-traditional Security at master's level (*Economics and Finance Security, Enterprises Security, Information and Cyber Security, Market Risks and Trade Investigation...*)
- More dual degree training programmes and training programmes taught in English are offered from this school year
- Major postgraduate training institutions provide conditions for undergraduate students to study integrated bachelor – master's programmes
- More engineering-specialised students choose to earn an engineering degree (equivalent to master's level)

“The country is developing in many different sectors, including industries in the process of transformation, from mechanics to automation to digitalisation, with a high demand for electronic engineers.

Marketing on social media in the country is strongly developing, leading to a great need for a digital marketing workforce. In addition, hospitals in the country will need more biomedical engineers”.

(Rector of Hong Bang International University)

<https://vietnamnews.vn/society/591738/private-public-universities-launch-new-majors-to-meet-labour-trends.html>

Opportunities

- MOET approved a Proposal to improve capabilities of training teachers and management staff at higher education institutions in the period of 2019-2026
 - *10% HE teachers should have PhD level (7% trained abroad, 3% trained locally through TNE programmes)*
 - *80% HE teachers in the field of culture, arts and sports should have master's level, to be trained abroad or locally*
- Vietnam National Strategy for the Development of Cultural Industries to 2020, with vision to 2030 will pave the way for developing human resources in creative industries at high level
 - *300 bachelors, 180 master's, 50 PhDs to be trained abroad (UK: 81 students at UG & PG level) for period 2016 – 2030*
 - *Training fields: music, arts, acting, cinematography, dancing, culture...*
- TNE activities are encouraged by MOET, especially at PhD level and in the subject areas of science and technology. A new MOET's regulation aiming at standardising training curriculum at bachelor, master's and doctoral level will be released late this year, promising to facilitate TNE activities (articulation, joint-training...)

Opportunities

National scholarship schemes:

1. MOET's National Scholarship Scheme 911:

- PhDs only, 7% trained abroad, 3% trained locally (details to be announced late this year)

2. Mekong 1000 Scholarship scheme:

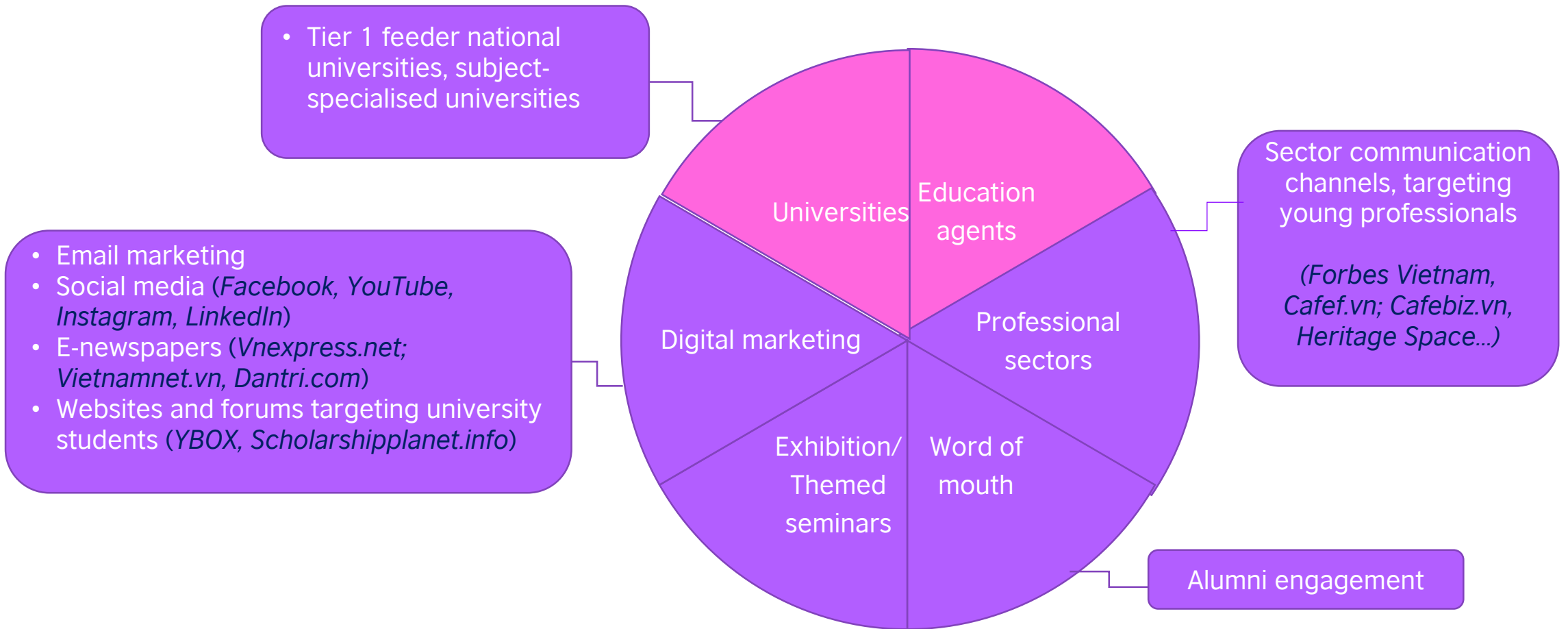
- To train about 1,000 master's and PhDs overseas
- Phase 2 (beyond 2020) will depend on training needs of each cities/localities in Mekong region
- Prioritised subjects include Mechanics, IT, Processing Technology, Construction Technology, Materials Technology, Chemistry, Energy, Urban Planning.
- Managed by Can Tho University

Challenges

- Vietnam market is still very cost-and-scholarship focused
- Limited awareness about the diversity of locations, culture and some specific aspects of the UK (science and technology, creative industries...)
- Limited WOM from acquaintances in the UK (as compared to the US and Australia)
- Not much information available about job opportunities in the UK for international students to make use of the New Graduate Route, as well as job opportunities in Vietnam for students who return

UK postgraduate market – Marketing your institution

Direct marketing channels



Marketing in post-Covid 19 – agents’ recommendations

*Institutions should enhance promotion about **subject areas**, especially new subjects that are attractive to Vietnamese students, through webinars. Inviting career counsellors and/or industrial professionals to talk about **employability trends and employment opportunities** in the UK and also in Vietnam will attract more students...*

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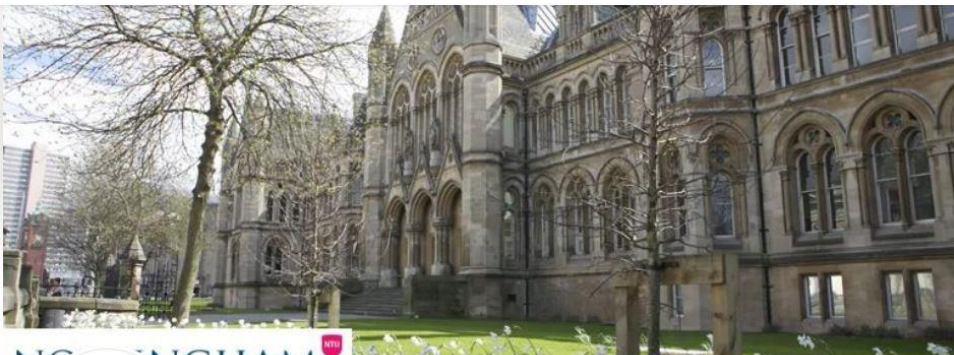
Marketing case studies



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26 September at 00:51 · 🌐

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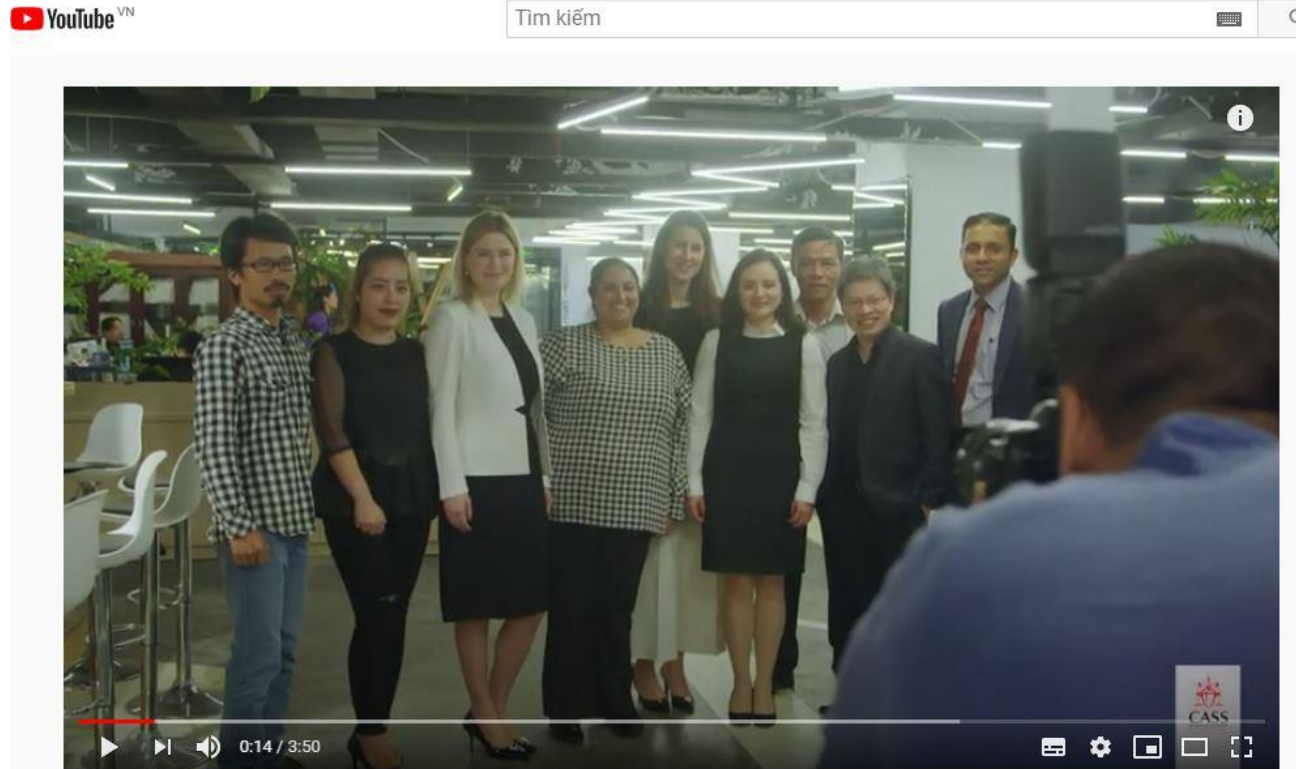
Nhóm Consultancy của các bạn có kỉ niệm gì đáng nhớ không, chia sẻ cùng chúng tớ nhé 😊



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**Nottingham Business School postgraduate Finance
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Marketing initiatives



Cass: MBA International Consultancy Week in Vietnam

MBA International Consultancy Week of Cass Business School in Vietnam has been implemented for the past 5 years



Showcasing
employability
benefits



Outshine others in a competitive job market

ICAEW Global Virtual Skills Conference
8 - 10 September 2020

ICAEW Global Virtual Skills Conference & Global Virtual Internship Programme are well promoted in Vietnam

Recommended approach for future success

Market positioning strategy

- Market update and insights
- Market opportunities identification
- Market research
- Market scoping

Direct student recruitment

- Bespoke digital marketing campaigns
- University tour/online group counselling
- Themed seminars/webinars
- Exhibition (virtual, f2f)
- Agent relationships brokering
- Alumni engagement

Institutional partnerships

- Partners identification
- Institutional relationships brokering
- Partnership activities development (articulation, credits transfer, research...)

In-country presence/engagement

- Sector engagement opportunities identification
- Introduction/Engagement activities (conferences, seminars, training courses...)

Conclusion

- New Graduate Route promises a bounce back to Vietnam market
- Emerging technologies to support the country's industrial revolution 4.0 will influence subject trends
- Partnership with local universities is an effective channel to push student recruitment at postgraduate level
- Frequent engagement with prospective students on social media channels (especially Facebook and Instagram) is a crucial marketing approach during and post Covid-19

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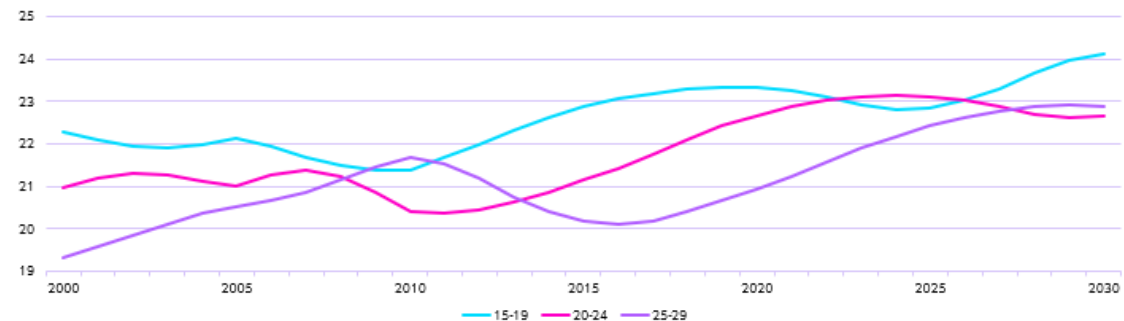


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Indonesia

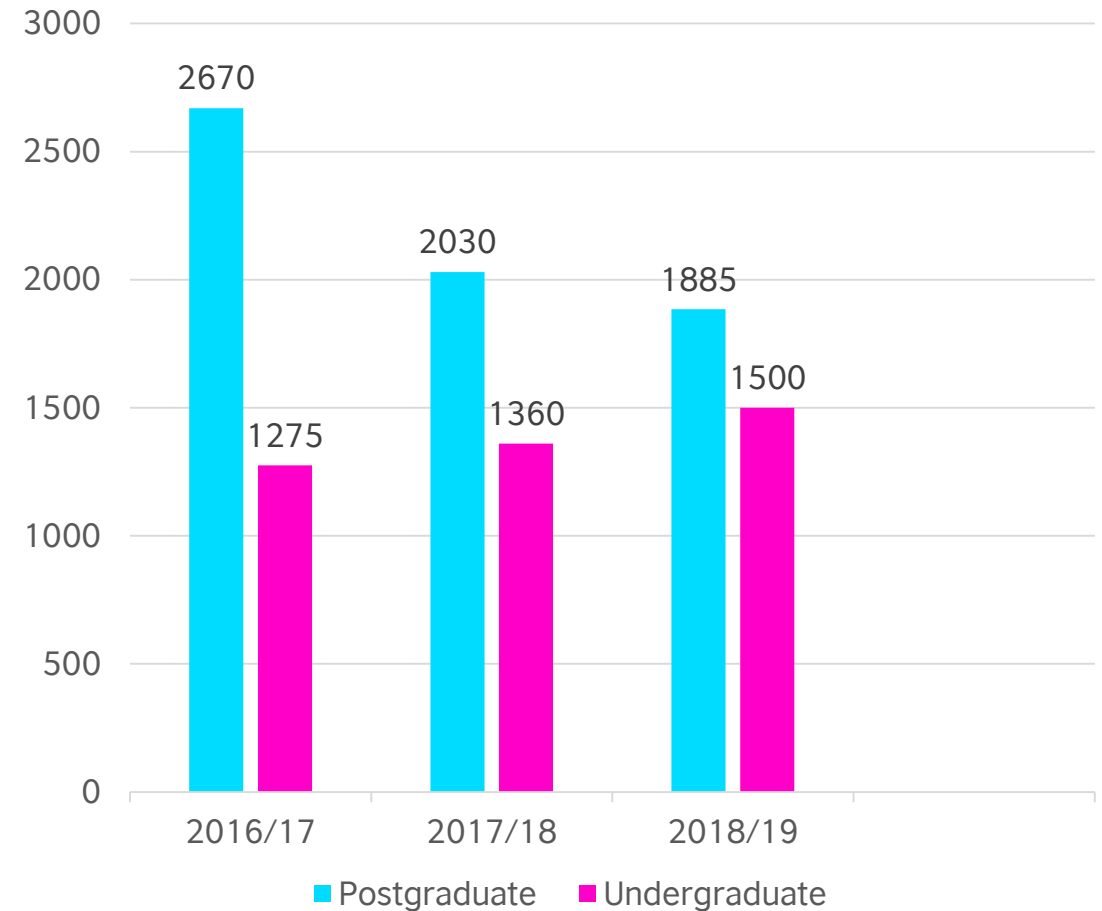
Indonesia – the PG premise

- 4th most populous
- Increasing student demographics
- 17000 islands – 3 time zones – 500 plus dialects
- T1 and T2 regions
- Traditionally PG & scholarship driven
- 4000+ HEIs – 48% accredited



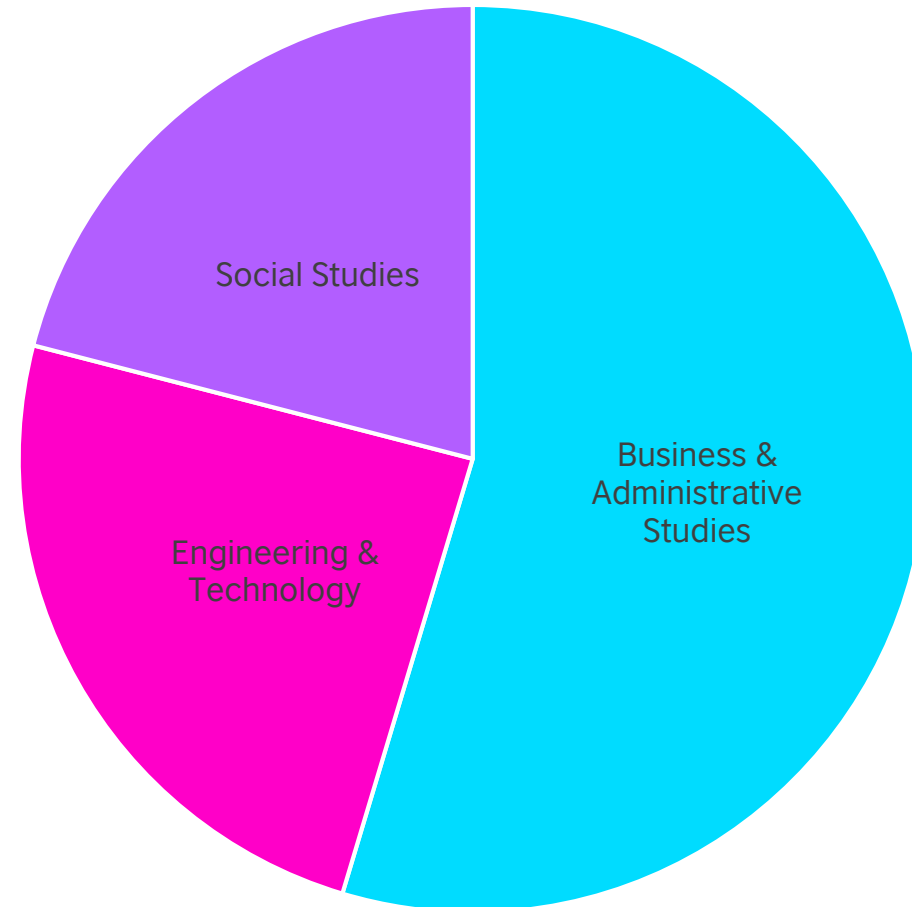
International recruitment: stabilising and growth oriented

- Funding led nose-dive for PG in 2017
- PG driven and UG growth
- LPDP vs Self-financed
- Getting back on trend



Drivers for subject choices - 1

- Top subject choices for PG applicants: *Business & Administrative Studies, Engineering and Technology – digital technology, renewable energies, Social Studies*
- Professional development
- Employability – *placement, graduate route, industry linkages*
- Finance & competition



■ Business & Administrative Studies ■ Engineering & Technology
■ Social Studies ■

Drivers for subject choices - 2

- Government priority areas for development
- Digital economy boom: *Indonesia slated to be the biggest digital economy in region*
- Home to 4 of the Top 10 Unicorn companies

Scholarships:

- *LPDP - on hold*
- *Corporate funding/HR*
- *GREAT Scholarships*
- *Chevening*

Recommendation:

- *Promotion for self-financed PG students*

Government plans for 2020 – 2024 include: ***Increasing relevance & competitiveness of HE***

- **Triangle of collaboration: university-industry-government**
- **Adoption of technology for learning innovation**
- **Study programmes – adaptive to industry needs**
- **Higher education as science and technology development and centre for excellence**
- **Increase research and publications**
- **Improve quality of university graduates**

Government priorities – *defined*

- Development of human resource
- Education – training of faculty, development and collaborations
- Improve and increase PhDs
- Expand research collaborations
- Development geared towards sustainability
 - *food security*
 - *social entrepreneurship*
 - *engineering & renewable energy*
 - *digital transformation*
 - *medical science/allied health*
 - *maritime*
 - *social sciences*
 - *creative industries*

Insights from the field

Student plans for 2021:

- Anticipated increase – January and beyond
- Major worries: pandemic in UK, costs, discounts for online study, IELTS/alternative institution arrangements
- Current focus: business, engineering, fintech, chemical renewables, AI, design, game designing, digital media
- Regional TNE

Recommendations to maximise potential recruitment

- **Consider costs – online/F2F, payment plans, accommodation discounts**
- **Scholarships**
- **Alternative language assessment alternatives**
- **Importance of staying visible**
- **Improve response time and be available**
- **Consider increasing subject availability for January in line with September**

Steps we must ensure:

- ✓ Aware of the prospective interests
- ✓ Maintaining sustained contact and visibility
- ✓ Announce solutions for concerns identified
- ✓ Providing incentive – *invite* interest and engagement
- ✓ Optimise alumni & agents
- ✓ Don't forget competitors
- ✓ For PG don't just rely on LPDP
- ✓ It's a matter of time!

Challenges to navigate

- **LPDP scholarships – *delayed due to pandemic***
- **MORA – *finding and supporting the right candidates/applicants***
- **Financial aid/institution scholarships - *incentivise – possible reduction in tuition fee for on-campus and distance learning***
- **Expenses are a major factor – *being catered to by competition***
- **The January intake – *providing more subject options like September***
- **Strong competition and visibility by competitor study destinations**

Available effective platforms for outreach

- Digital media
- Social media influencers
- Industry/employer linkages
- Your alumni and agent networks

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Thank you!

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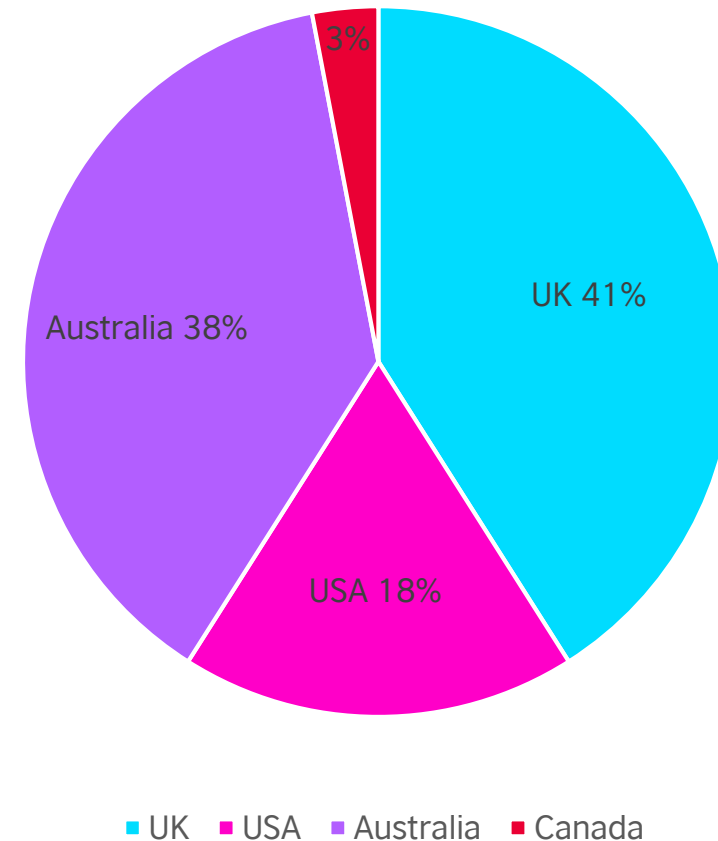
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Malaysia

Malaysia – the market

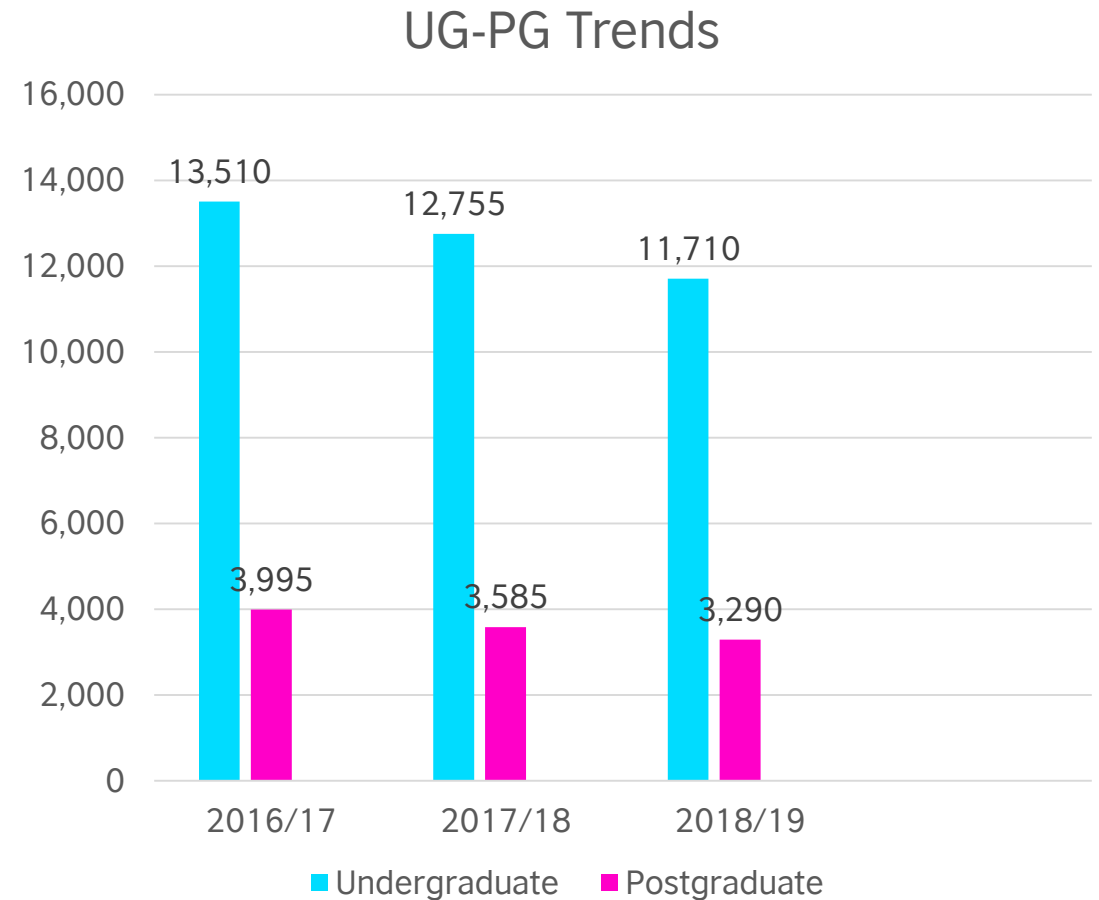
- A mature market: *internationally, regionally and locally*
- Developed pathways – spoilt for choice - *local + international options*
- Extensive government investment in education
- Regional hub ➡ international hub
- New government since March 2020

Market share



International recruitment for UK

- Predominantly UG led – *so why are we here?*
- PG holding more steady – with slight decline
- 2020 dynamics – post pandemic:
 - *drop in international acceptances?*
 - *gap year/work experience?*
 - *local provision + TNE?*
 - *late start?*
- Potential for future increase in PG



Malaysia in 2020 – *the post pandemic scenario*

- **Government policies:**
 - *response to pandemic*
- **TNE – *globally endorsed by QAA/MQA***
- **Local HEIs: *rankings, partnerships and articulation***
- **Branch campuses (offering both UG & PG)**

What will be the driving factors now?

- **Employability/appeal of industrial placement**
- **Graduate route**
- **1-year PG degree**
- **Scholarships/finances**
- **Niche subject specialisations & excellence**

Subjects PG	2016/17	2017/18	2018/19
Business & Administrative Studies	730	660	595
Engineering & Technology	730	580	485
Law	400	455	455
Biological Sciences	310	285	270
Architecture, Building & Planning	270	245	270

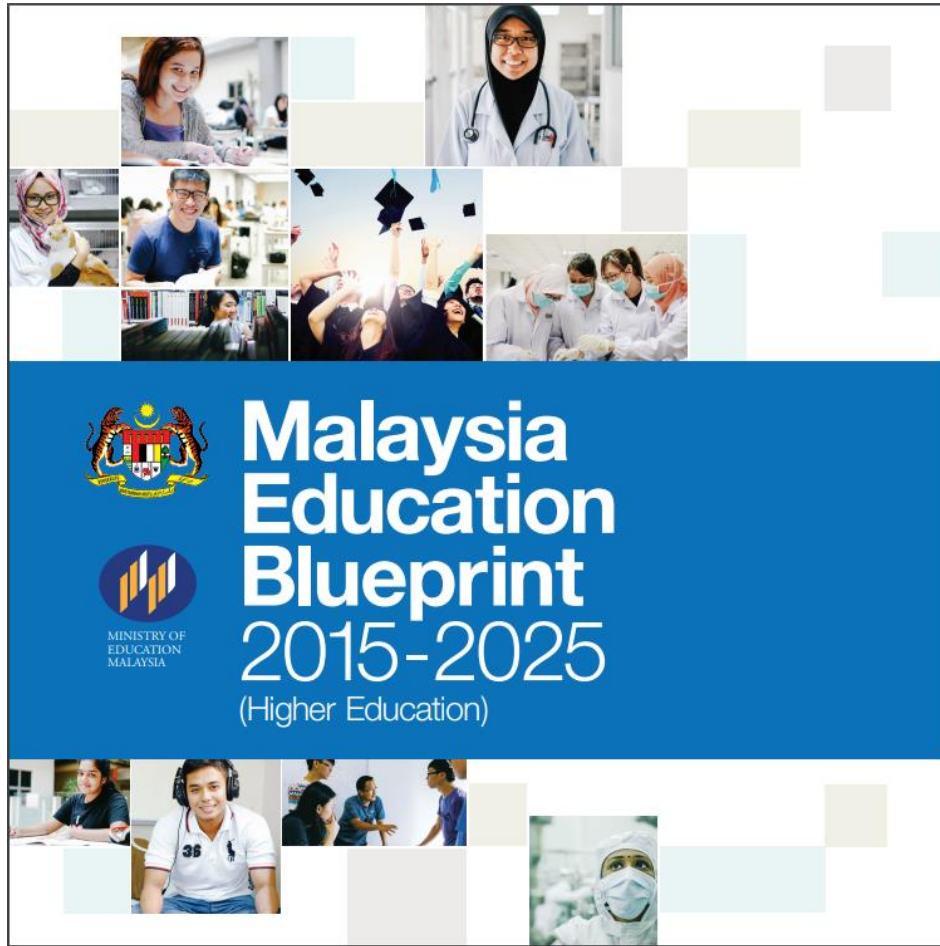
Niche specialisations & sectors

- Major player in ASEAN
- Expanding finance/fintech sector
- Aggressive education agenda
- Extensive international provision
- QS Asia = 5 in Top 50
- Geared to increase research & international collaborations

Govt direction:

- Infrastructure development
- ICT – Industry 4.0
- Digital Communications
- Bio-technology
- Finance
- Tourism and hospitality
- Creative industries
- Employability/job creation/entrepreneurship

The Malaysia Education Blueprint – *the 10 shifts*



New government – immediate concerns/focus – open for collaborations

- **Entrepreneurship – *boost employability***
- **Capacity building – *digital education – teaching and learning***
- **Enhance graduate employability**
- **Expand research output**
- **Increase PhDs**
- **TVET**

Priority sectors of development:

- ***Social entrepreneurship***
- ***Industry 4.0***
- ***Digital technology***
- ***Fintech***
- ***Creative Industries***

Challenges to expect and navigate

- Upcoming PG intakes *may feature students already in UK*
- UG/credit transfers – *will remain a focus*
- PG applicants – *often funding reliant*
- Main concern: *well-being*
- Visa concerns
- Logistic/travel concerns
- Family economics

What can UK institutions do

Capitalise want for ‘full experience’

Be agile and ready to change

Maintain sustained comms

Consider cost factor

- **Scale of flexibility/entry requirements**
- **General generic promotion does not sell**
- **Professional courses in focus**
- **Communication/messaging: employability, scholarships**
- **Alumni successes/testimonials**

Effective outreach and channels

- Digital media: deliberate messaging catering to circumstances and audiences
- Industry/employer linkages
- Alumni success stories
- Agents networks

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Ad www.britishcouncil.my

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Vietnam

Agenda

- **Market at a glance**
- **Understanding your Vietnamese prospective students**
- **Market trends, opportunities and challenges**
- **Marketing your institution**
 - *Direct recruitment channels*
 - *Marketing case studies*
 - *Recommended approach*

Market at a glance

Economic overview

- GDP growth rate in 2019: 7%; in 2020: 1.81% (estimated)
- Important free trade agreements (EU-Vietnam; ASEAN Economic Community, CPTPP)
- Middle income class accounts for 13% of the population (expected 26% by 2026)
- A star in Covid-19 fight

Education market

- By 2019, Vietnam has 237 universities (public: 172, private: 60, foreign-invested: 5), of which 140 provide PhD training and 180 provide master's training;
- About 1,500 PhDs and 36,000 Master's graduate every year;
- Nearly 550 TNE programmes between 85 Vietnamese universities with 258 foreign partners (18,000 bachelor, 28,000 master's and 60 PhDs students have graduated). UK TNE: over 60 programmes
- 35 advanced training programmes; 60 high-quality programmes and 16 high-quality engineers training programme

(Source: MOET report of school year 2018-19)

Market at a glance

- Vietnamese parents tend to send their children to study abroad at an earlier age. Once finishing a bachelor degree, students tend to keep studying further for a master's
- Low training quality and relaxed management of master's training programmes delivered by local universities led to a high interest of pursuing master's abroad
- Increasing number of international and joint-training master's programmes in Vietnam, especially MBAs (*CFVG: cfvg.org; Solvay Brussels School Vietnam: <https://solvay-mba.edu.vn/>, ...*)
- Vingroup offers scholarships to train master's and PhDs abroad and in country in fields of science and technology, engineering and medicine
- Stronger promotion of master's courses at European countries (Germany, France, Ireland, Italy...), and other countries in the region (Japan, Korea..). Vietnam is in top 20 countries receiving most Erasmus scholarships in 2020.

UK education market in Vietnam – a snapshot

- Tier 4 visa in 2019: a bounce back with **9.4%** increase (*UKVI*)
- The North of Vietnam (mainly Hanoi): main market, accounting for 60% of total Tier 4 visa (*UKVI Vietnam 2019*)
- UK market share among English speaking countries: **7%**
- Vietnamese enrolment in UK HEIs 2018/19: **3,565** (equally divided between undergrad and postgrad) (*Source: HESA*)
- Business and administration subject dominated (over 65%), noticeable increased enrolment in education and law (*Source: HESA*)

Top players in postgraduate recruitment market:

- Nottingham Trent University
- University of the West of England
- The University of Huddersfield
- Bournemouth University
- The University of Greenwich

(*Source: HESA, 2018/19*)

Their common “recipe”

In-country
representative

+

University partnership

UK postgraduate market - Understanding your Vietnamese prospective students

Generation Z – Fresh Graduate

GEN Z

Generation Z is defined as young people whose birth year belongs to the second half of the 1990s until the early years of the 2000s (about 1996 to 2001).

Generation Z reaches adulthood when the world enters 2020 and is capable of officially participating in the labor force. In Vietnam, by 2025, Generation Z will account for about 25% of the workforce, equivalent to 15 million people.

Generation Z was born and grown in the Age of Technology, with outstanding applications of the Internet, mobile devices, social media, etc. This shaping the traits and changing consumer as well as the work behaviors of Generation Z compared to previous generations.

Their characteristics

1 High energy level, enthusiasm & dynamism

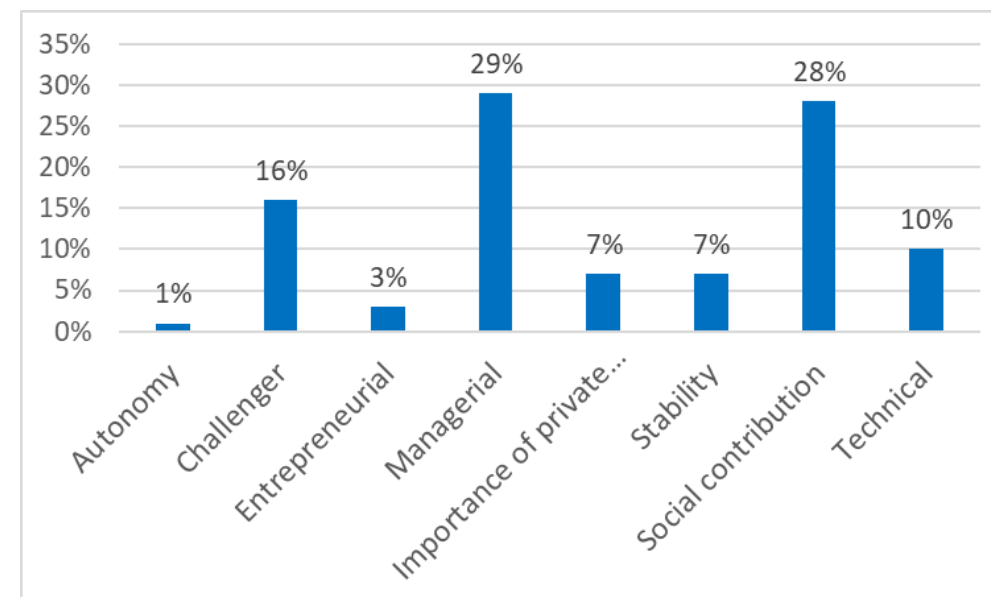
2 They have great expectations for advancement and professional development

3 They are willing to take on challenges and pressure at work

4 They are skillful in communication and have the ability to express sympathy

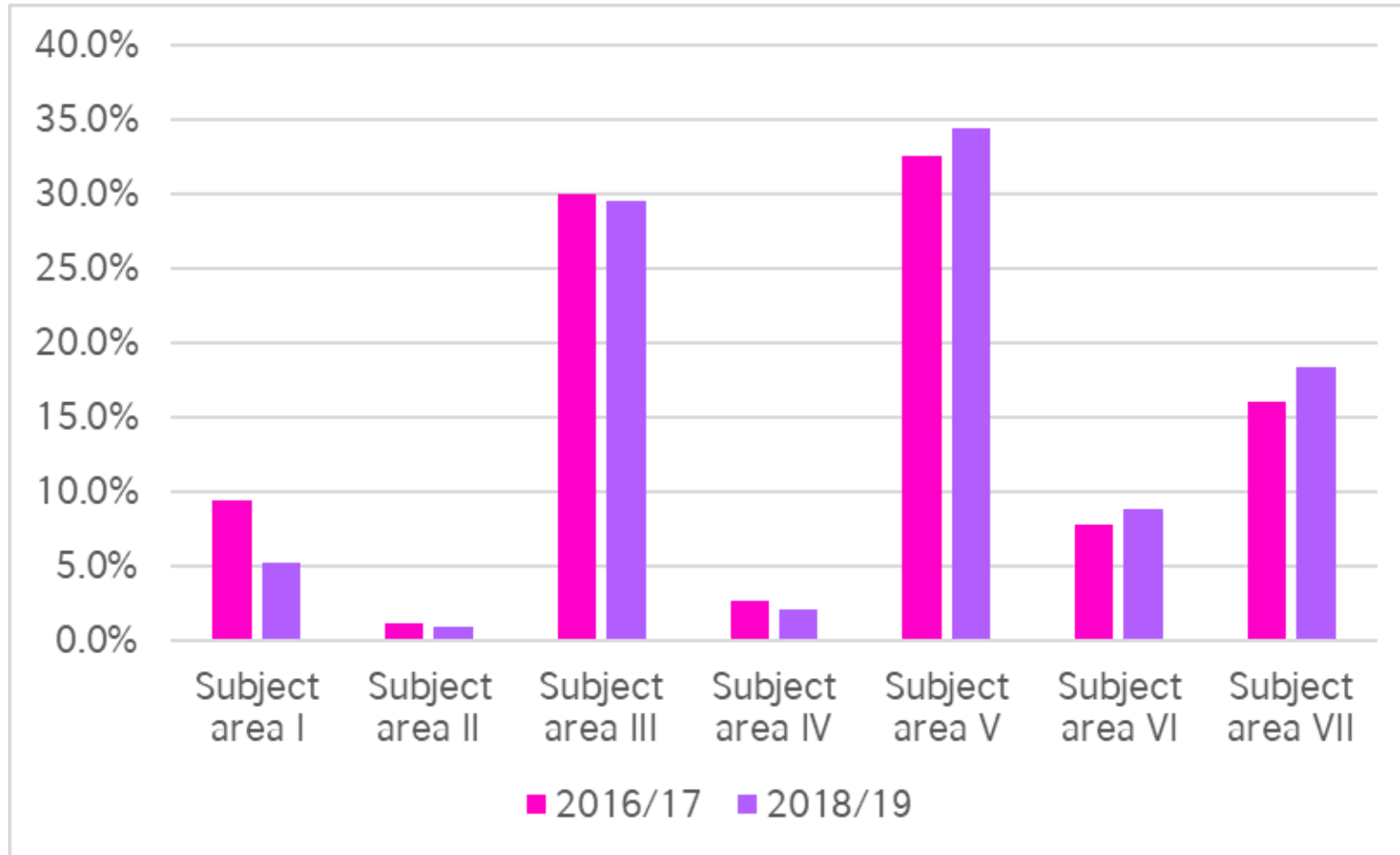
5 Because they do not have much experience, they are indecisive in action

Their career orientation



Source: Report “**Generation Z – Fresh Graduate: The Characteristics and Career Orientation – August 2020**” (Navigos Group – Vietnamworks)

Subject choice of Vietnamese undergrad students



Code	Subjects
Subject area I	Education science and teachers training
Subject area II	Arts
Subject area III	Business, management and law
Subject area IV	Life & natural sciences
Subject area V	Maths, IT, Technical Engineering, Production, Civil Engineering, Agriculture
Subject area VI	Health
Subject area VII	Social sciences, Communication, Social services, Tourism and Hospitality, Logistics, Environment

Source: Higher Education Report 2018-19, MOET Vietnam

Which universities do your students come from?

Public universities	Private and international universities
Hanoi	
Vietnam National University Foreign Trade University National Economics University	British University Vietnam
Ho Chi Minh city	
Vietnam National University Foreign Trade University Banking University University of Economics University of Economics and Law	RMIT Vietnam (<i>also have Hanoi campus</i>) Hoa Sen University Hong Bang University University of Economics and Finance
Danang city	
University of Economics University of Foreign Languages	Vietnam-UK Institute Duy Tan University
Mekong region	
Can Tho University (Can Tho city)	

Which universities do your students come from?

Students from “special” bachelor programmes offered by local public universities have potential to study further:

- **Advanced training programmes:** undergrad programmes using imported foreign curriculum, taught 100% in English, financial support from MOET
- **High-quality training programmes:** undergrad programmes taught partially (at least 30%) in English, no financial support from MOET
- **Joint training undergraduate programmes:** undergrad programmes developed in partnership with foreign universities, taught 100% in English, high tuition fees

What the education agents say...

At master's level, **only 30% of students care about ranking**. Most of them just need a course that matches with what they studied at undergraduate level and fits with their budget. They simply want to have **experience of studying in a foreign country**...

There is a trend of studying a second master's in the UK to catch the **New Graduate Route**

A growing interest in IT, Data science, Media, Engineering, Education, TESOL, Event management, Curating arts, Hospitality...

Recommendation from friends or teachers are important in their decision making process. Only a small number do self-research, others depend a lot on advice and information provided by **agent counsellors**.

Vietnamese students are very interested in having **internship opportunities** (not necessarily paid work placement). If UK universities can provide good support in this field, and together with the New Graduate Route, UK master's programmes will be 'leading' the student recruitment market in Vietnam...

UK postgraduate market - Market trends, opportunities and challenges

Market trends

Việt Nam puts priority on artificial intelligence development



Recruitment demand in IT industry quadruples

Vietnam to approve national strategy on digital technology business development soon

“... the recruitment demand of the IT industry has quadrupled after a decade, with biggest demand in the field of software development...”
<https://vietnamnews.vn/society/717881/recruitment-demand-in-it-industry-quadruples.html>

“The Ministry of Planning and Investment planned to expand the network of Vietnamese AI experts in other countries and establish a global fund to train high-quality human resources for the industry”.
<https://vietnamnews.vn/society/534918/viet-nam-puts-priority-on-artificial-intelligence-development.html>

“...by 2025, the country aims to have 70,000 digital technology firms; train a workforce of 1.2 million for digital technology”.
<https://www.vir.com.vn/vietnam-to-approve-national-strategy-on-digital-technology-business-development-soon-78760.html>

Market trends

- Many public and private universities launched new majors in this school year, especially in the field of science and technology such as *data science (including AI), electronic engineering, biomedical engineering, biotechnology, medical physics.*
- Vietnam is to have the first University of Health Sciences
- Vietnam National University (VNU-Hanoi) launched 8 new majors in Management of Non-traditional Security at master's level (*Economics and Finance Security, Enterprises Security, Information and Cyber Security, Market Risks and Trade Investigation...*)
- More dual degree training programmes and training programmes taught in English are offered from this school year
- Major postgraduate training institutions provide conditions for undergraduate students to study integrated bachelor – master's programmes
- More engineering-specialised students choose to earn an engineering degree (equivalent to master's level)

“The country is developing in many different sectors, including industries in the process of transformation, from mechanics to automation to digitalisation, with a high demand for electronic engineers.

Marketing on social media in the country is strongly developing, leading to a great need for a digital marketing workforce. In addition, hospitals in the country will need more biomedical engineers”.

(Rector of Hong Bang International University)

<https://vietnamnews.vn/society/591738/private-public-universities-launch-new-majors-to-meet-labour-trends.html>

Opportunities

- MOET approved a Proposal to improve capabilities of training teachers and management staff at higher education institutions in the period of 2019-2026
 - *10% HE teachers should have PhD level (7% trained abroad, 3% trained locally through TNE programmes)*
 - *80% HE teachers in the field of culture, arts and sports should have master's level, to be trained abroad or locally*
- Vietnam National Strategy for the Development of Cultural Industries to 2020, with vision to 2030 will pave the way for developing human resources in creative industries at high level
 - *300 bachelors, 180 master's, 50 PhDs to be trained abroad (UK: 81 students at UG & PG level) for period 2016 – 2030*
 - *Training fields: music, arts, acting, cinematography, dancing, culture...*
- TNE activities are encouraged by MOET, especially at PhD level and in the subject areas of science and technology. A new MOET's regulation aiming at standardising training curriculum at bachelor, master's and doctoral level will be released late this year, promising to facilitate TNE activities (articulation, joint-training...)

Opportunities

National scholarship schemes:

1. MOET's National Scholarship Scheme 911:

- PhDs only, 7% trained abroad, 3% trained locally (details to be announced late this year)

2. Mekong 1000 Scholarship scheme:

- To train about 1,000 master's and PhDs overseas
- Phase 2 (beyond 2020) will depend on training needs of each cities/localities in Mekong region
- Prioritised subjects include Mechanics, IT, Processing Technology, Construction Technology, Materials Technology, Chemistry, Energy, Urban Planning.
- Managed by Can Tho University

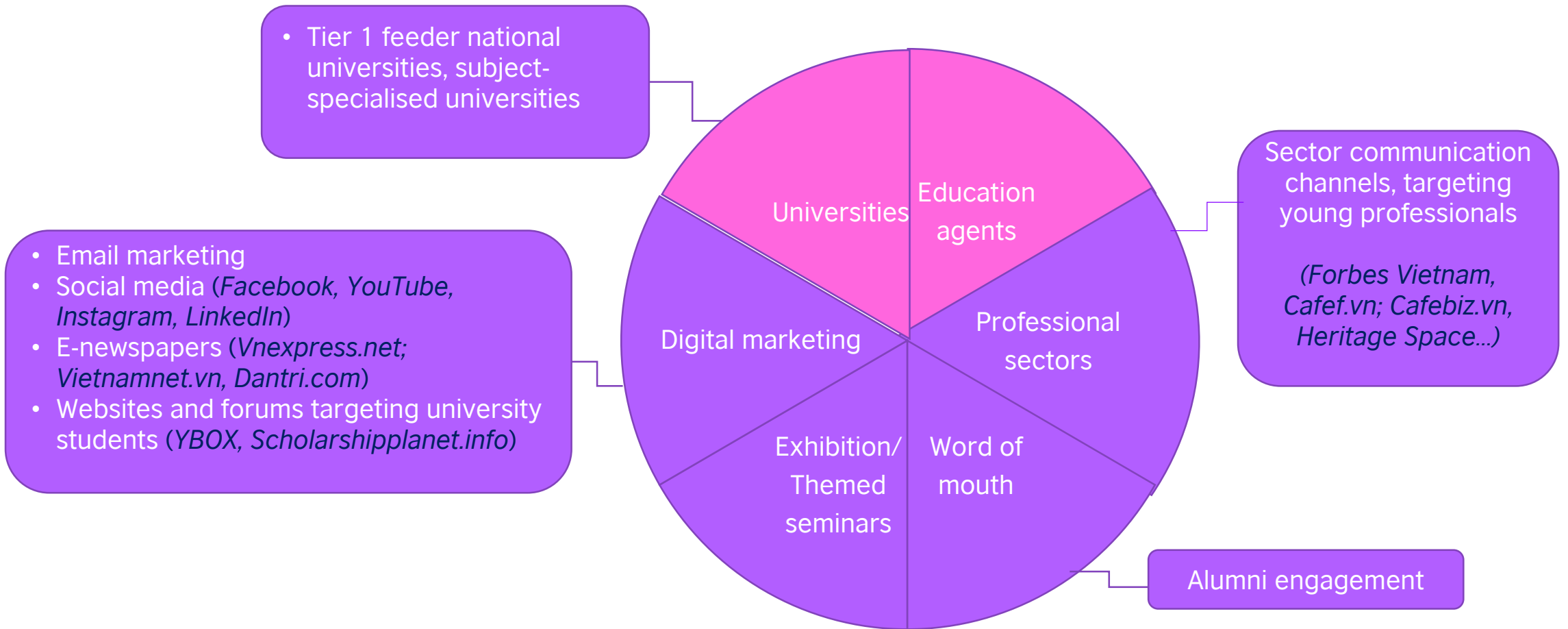
Challenges

- Vietnam market is still very cost-and-scholarship focused
- Limited awareness about the diversity of locations, culture and some specific aspects of the UK (science and technology, creative industries...)
- Limited WOM from acquaintances in the UK (as compared to the US and Australia)
- Not much information available about job opportunities in the UK for international students to make use of the New Graduate Route, as well as job opportunities in Vietnam for students who return



UK postgraduate market – Marketing your institution

Direct marketing channels



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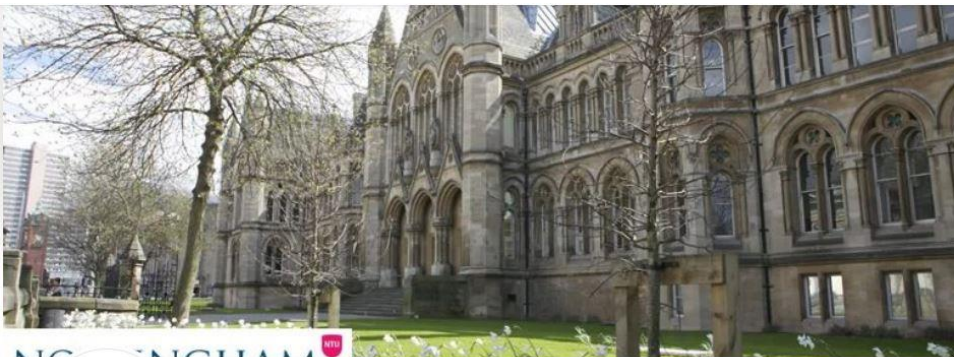
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26 September at 00:51 · 🌐

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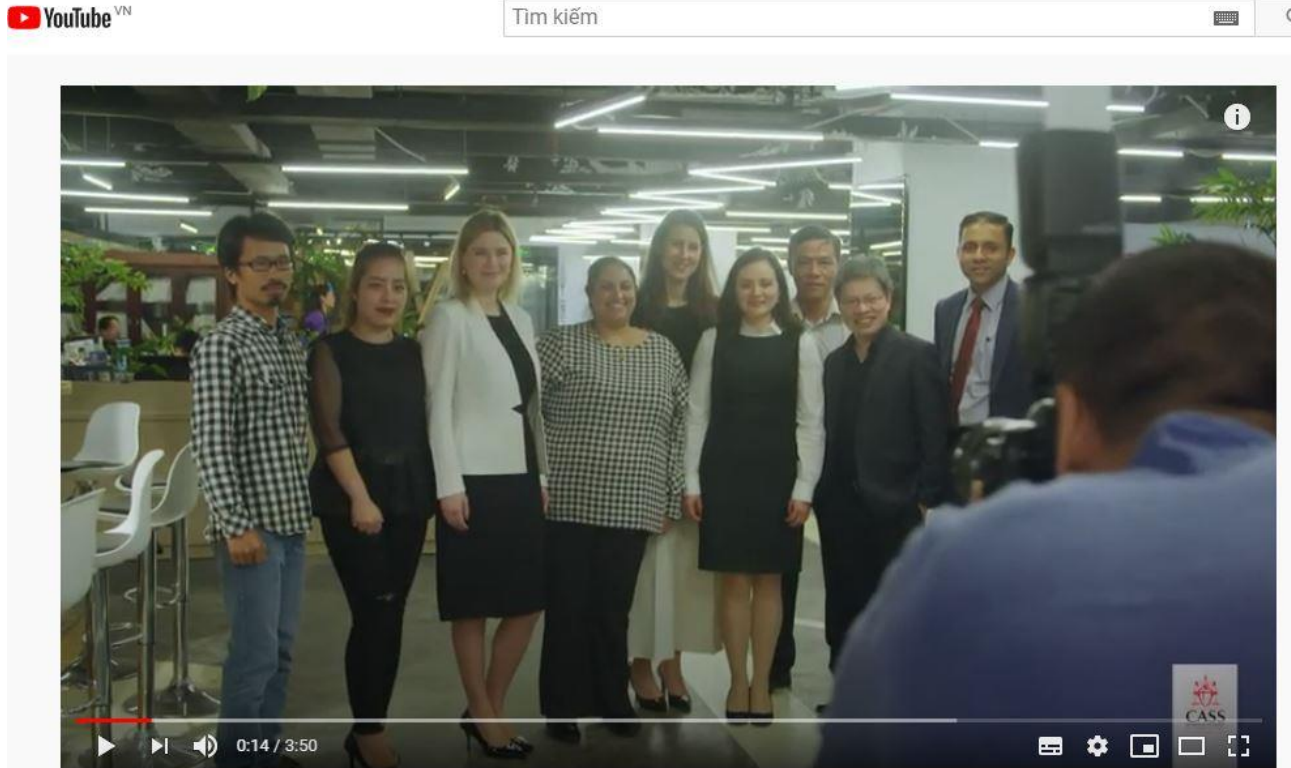
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Thank you for joining

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