



# British Council International Education Services G20+ Summit

INTERNATIONAL  
EDUCATION  
SERVICES

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# G20+ Summit

- British Council was delighted to present the 'G20+ Summit', focusing specifically on postgraduate (PG) recruitment channels for the January and February 2021 intake.
- This online event provided up-to-date information on key PG recruitment markets, with each presentation focusing on specific markets and thematic areas.

# G20+ Summit at a Glance...

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488 registrations  
from 148  
institutions



20 country  
presentations  
covering 7 regions



1781 attendees  
of individual  
sessions



46 hours of  
1-2-1 consultations



137 1-2-1  
consultations in  
over 27 markets



# Contents

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Select your region of interest below to read their G20+ Summit highlights:

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- [Middle East and North Africa](#)
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- [East Asia](#)
- [Europe](#)
- [Wider Europe](#)
- [Americas](#)

# South Asia Highlights

- Regional Introduction
- Bangladesh
- India
- Pakistan

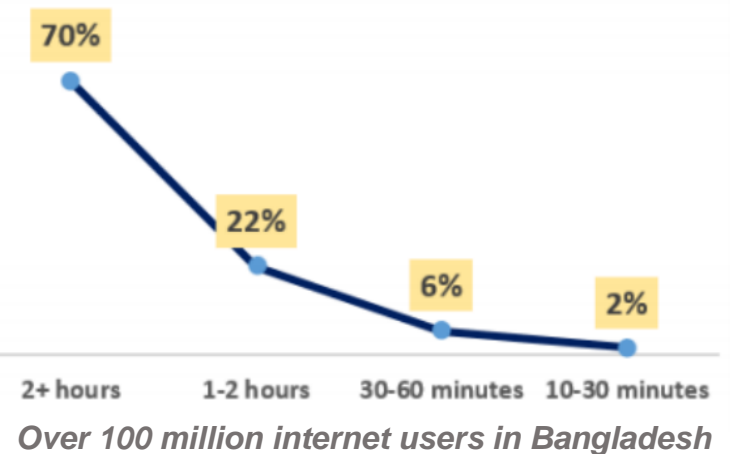
## South Asia

- All South Asian governments have ambitious **reform agendas targeting innovation and technological progress to drive growth**
- **359% rise in NOC's issued** for Nepali students. The **2 + 1 year model will be an attractive option** for students (2 years in Nepal, 1 year in UK)
- **20K Sri Lankan students enrolled** in tertiary institutions abroad in 2017. Sri Lankan policy on **TNE** has been limited but foreign universities can now offer in-country programmes, over 35 UK HE institutions currently do

## Bangladesh

- **Middle class is projected to nearly triple** – to roughly 35 million people – by 2025
- Demand for an overseas education is being fuelled by a **supply-demand gap at home**
- The number of **Bangladeshi students enrolled in degree programs abroad has quadrupled** within 12 years

Daily Internet Usage



# South Asia Highlights

- Regional Introduction
- Bangladesh
- India
- Pakistan

## India

- By 2025 **digitisation in India will help grow the education sector to \$50Bn**
- **NEP** creates opportunities for UK HE Sector: faculty development, student exchange, blended learning, collaborative research, joint incubation, and setting up of foreign campuses in India
- **Popular subjects:**
  - Medicine
  - Bioscience Data Science
  - Cyber security
  - Cloud computing
  - AI/machine learning/Robotics
  - Logistics and supply chain
  - Digital marketing
  - Healthcare
  - Engineering and technology
  - Liberal arts

## Pakistan

- Pakistan has **outbound mobility ratio of 2.7%**, the highest in the region
- **20% increase in PG students coming to the UK** over the last 3 years, this will continue to increase because of Graduate Route
- **Business Management, Engineering and Technology** and **Social Studies** continue to be the most popular subjects

## Pakistan – a snapshot



# Middle East and North Africa Highlights

- Regional Introduction
- Egypt
- Saudi Arabia
- UAE

## Middle East and North Africa

- Total number of PG students from MENA in the UK is **13,140** (HESA)
- Most **popular subject** areas are:
  - business & administrative studies
  - engineering & technology
  - subjects allied to medicine
- UK **Graduate Route** will likely generate renewed interest from students in the MENA region



*Best channels to reach students*

## Egypt

- Egypt has the **largest education system in MENA**. Enrolment has increased by 0.9m since 2011 and it is expected to increase another 0.9m by 2030
- **TNE** is a government priority for internationalization and is a part of Egypt's Vision. Currently there are over **20,000 students in HEI's studying UK qualifications**
- State of the art universities are being built and **international partners are sought**
- Government is seeking to increase the percentage of international students studying in Egyptian Universities from 3% to 6% by 2030 to become the **TNE hub for Africa and Middle East**

# Middle East and North Africa Highlights

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- Regional Introduction
- Egypt
- Saudi Arabia
- UAE

## Saudi Arabia

- The UK is the **second most popular international study destination**, particularly at PG level.
- World's **fifth-largest country of origin for those studying abroad** and the Middle East's leading student sender
- **Education is an important pillar of Vision 2030**
- The **Two Holy Mosques Scholarship Program**, the largest national scholarship program worldwide, has boosted outward mobility

## UAE

- **The most popular subjects are:**
  - business and administrative studies
  - engineering and technology
  - social studies
- **Top 5 'in-demand' job roles are:**
  - management accountants
  - CFOs
  - risk managers
  - heads of digital/digital transformation
  - artificial intelligence developers
- **Scholarship providers in UAE are looking for agile and progressive students**, a bachelor's, master's and PhD in the same subject is not necessary



# Sub-Saharan Africa Highlights

- Ghana
- Nigeria

## Ghana

- **Alumni engagement** is key in promotions strategy
- **Skills gaps identified include:**
  - ICT
  - Construction
  - Health Services
  - Entrepreneurship
  - Financial Services
  - Agriculture

### *Key Messages*

The UK cares about international students

The UK offers a world class university education

The UK is open for business and recruitment is happening now

## Nigeria

- **Emphasise attractiveness of the UK** and highlight one-year masters, the UK's value viz-a-viz US and Australia, health and safety, employability and the graduate route
- **Raise brand profile and create awareness all year round** through several marketing approaches including social media, email, webinars, professional groups, alumni engagement and student competitions

### *Key Messages*

International students will be eligible for the two-year Graduate route, which will be launched in summer 2021

Visa application centers are open and international students can start preparing themselves

The UK is a safe place to study and UK universities are prioritising students' safety and wellbeing

# East Asia Highlights

- Regional Introduction
- Vietnam
- Malaysia
- Indonesia

## East Asia

- **Employability is a continued priority**, both at home and in the UK
- **Communications need to address health and safety**, be specific about what would happen in the event of lockdown/infection
- **Developing industries: AI, big data, e-commerce, digital marketing**
- **Get to know your local marketing channels**, WoM social media and 'authentic' is most effective
- **Flexibility** is important regarding intake and subjects available for January vs September

## Vietnam

- Students looking for long term education, UG to Masters/PG without leaving the UK
- National Strategy to develop Cultural Industries
- **Understand Generation Z**

### *GEN Z 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

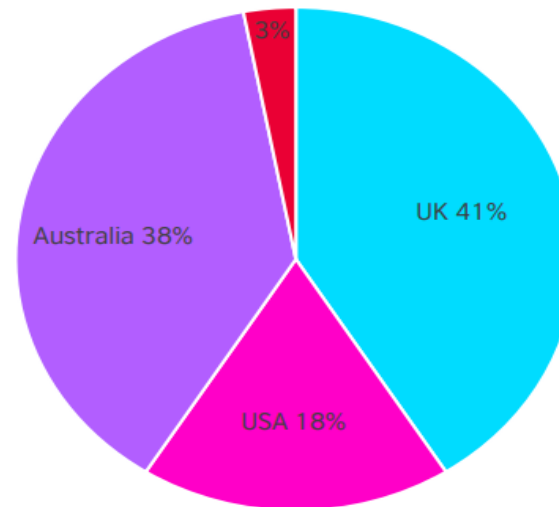
5 Because they do not have much experience, they are indecisive in action

# East Asia Highlights

- Regional Introduction
- Vietnam
- **Malaysia**
- **Indonesia**

## Malaysia

- **Ranking conscious**; recommended to promote niche specialisations
- Government is keenly invested in HE development, improved research, increase PhDs, international collaborations
- **Well-being is a major concern**



*Market Share*

## Indonesia

- A **cost sensitive market**
- **Targeted messaging** and promotion for self-financed applicants strongly recommended
- **Sectors in focus include:**
  - Industry 4.0
  - Digital economy
  - Renewable Energy
  - AI
  - Specialisations geared towards sustainability

# Europe Highlights

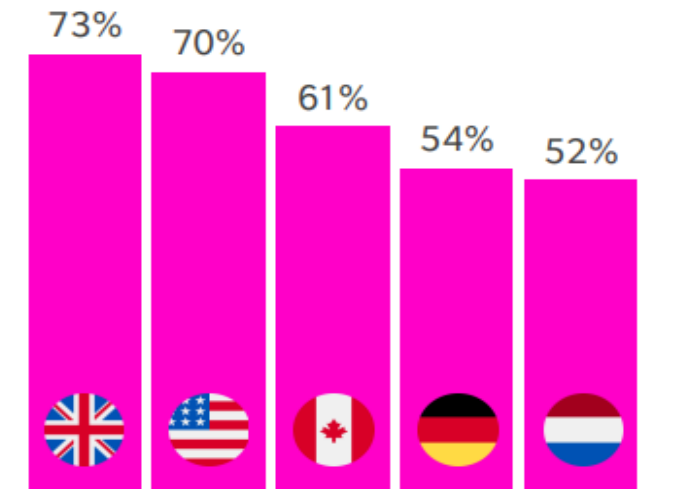
- Regional Introduction
- Germany
- Italy
- Greece

## Europe

- 4 in 10 students from the EU are less likely to consider studying in the UK because of **Brexit**
- Mainly **concerned about financial pressures**
- EU students are considering alternative provision as well as alternative study destinations (Netherlands and Germany)
- 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

## Germany

- **German student mobility is high**
- Study abroad, particularly in an English speaking country, is important for the future careers of young Germans
- German students research options to study abroad independently, intensively and prepare questions, so **be clear and give as much detail as you can**



*Future employability globally after studying*

# Europe Highlights

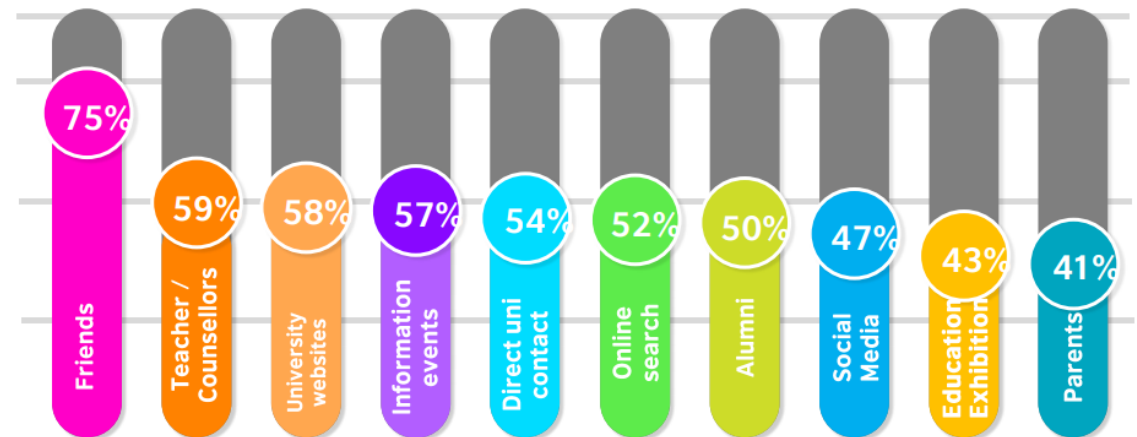
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## Italy

- One of the **top senders** of HE students to the UK
- Italian students come to the UK for the **high quality of teaching, international experience and for a more interesting career prospect**
- PG students have a **good level of English**

## Greece

- Greek student mobility to the UK is high, more than 30% of Greeks abroad study in the UK
- The interest for UK study remains strong but **high tuition fees is a barrier**
- There is a potential market for PG students in the upcoming intake if **marketing strategies are well targeted and supported with opportunities for financial support**



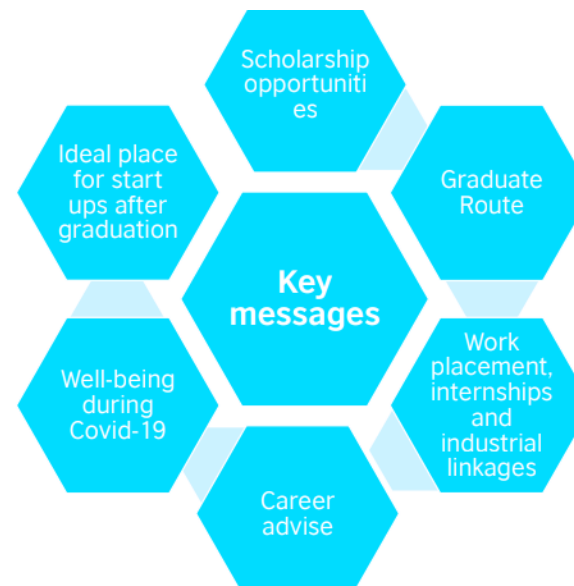
12 channels prospective students use to explore their options

# Wider Europe Highlights

- Regional Introduction
- Turkey
- Russia
- Uzbekistan/Kazakhstan

## Wider Europe

- 50K Wider European students have chosen the UK for study over last decade
- TNE opportunities: local providers are moving into online and hybrid delivery of education
- Digital marketing: doubling audience reach in 2020/21
- Over 2,500 Scholarships a year available for UK



## Turkey

- 400K PG students in Turkey, 50% are 25-29 years old
- 2/3 of students study PG in the UK Ministry of National Education offers 750 scholarships for 2021/22
- Unemployment rate has reached 13.4%. Demand for UK PG programmes is likely to increase as students look to enhance their job prospects



*Most popular platforms*

# Wider Europe Highlights

- Regional Introduction
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- Uzbekistan/  
Kazakhstan

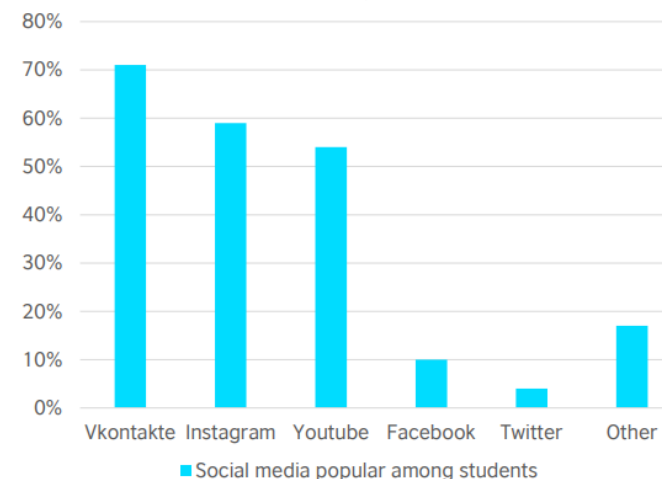
## Russia

- **Untapped:** 56K Russian students study abroad only 4k go to study in the UK
- **Newly emerging areas that will be in demand:**
  - Medicine, Genetic Engineering
  - Synthetic Biology, Climate Engineering
  - 3D printing, Nanotechnology, Robotics
  - IT, Data Analysis and Cyber Security
  - Design and Virtual Reality

## Uzbekistan/Kazakhstan

- **Bolashaq funds 550 scholarships** this year
- **El Yurt Umidi foundation** will send 900 people abroad this year.
- Kazakhstan will **fund 500 science scholars to take internship programmes abroad**
- **Invest in brand building during this time**

Social media popular among students  
(15-30 years)



# Americas Highlights

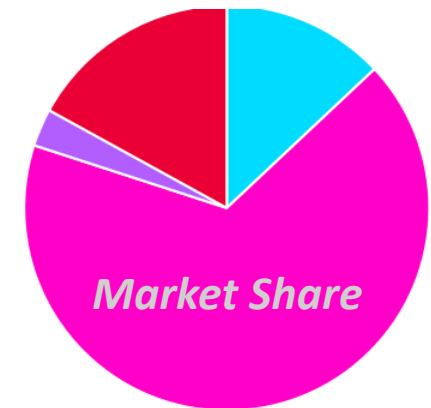
- Regional Introduction
- Mexico
- USA

## Americas

- **Need convincing on the quality** of online learning provision and the face-to-face opportunities available
- **Messaging should focus on reassuring students** of the health system and support they will have from the UK
- **Employability, industry links, and Graduate Route** should also be a focus of messaging
- Finances are a top concern for students

## Mexico

- **All education in-country switched to a remote/online mode**
- **Important messages to communicate:**
  - ✓ **Health and safety policies in the UK**
  - ✓ **Post-study work visa**
  - ✓ **Universities' competitive advantages over universities with no tuition fees**



■ UK ■ USA ■ Australia ■ Canada



# Americas Highlights

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- Regional Introduction
- Mexico
- **USA**

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## USA

- **Graduate student enrolment in the US has been increasing**, despite declines in undergraduate enrolment
- Growth in graduate student enrolment is **being driven by the devaluation of undergraduate degree and Master's degree becoming industry standard**, enhanced job prospects and higher salaries people think it will bring them, and there is an expected increase in graduate enrolments due to the economic recession in the US triggered by the Covid-19 pandemic
- **Important messaging for US students include:**
  - ✓ **reassurance about any interruptions to their education due to Covid-19**
  - ✓ **promoting the Graduate Student Route**
  - ✓ **alumni and professional networks**
  - ✓ **financial assistance available**
  - ✓ **the shorter time to complete a UK master's degrees**
  - ✓ **how universities are tackling social injustice**

# Direct Marketing Packages – Boost your brand

- G20+ Summit regional digital marketing packages: country specific targeted e-shots with a promoted Facebook post through the [Study UK Facebook page](#).
- International Education Services has a strong track record in delivering digital marketing campaigns: in August 2020 Queen Mary University of London increased PG Law applications by 67%
- [Find out more here](#)

# Direct Marketing Packages – Boost your brand



The screenshot shows the top of a webpage for the University of Plymouth. At the top left is the university's crest and logo, which includes the text 'UNIVERSITY OF PLYMOUTH' and 'School of Geography, Earth and Environmental Sciences'. Below this is a large banner image with the text 'MSc Environmental Geochemistry' overlaid. Underneath the banner is a sub-header: 'Launch of a brand new postgraduate programme in Environmental Geochemistry'. The main body of the page contains several paragraphs of text. The first paragraph states: 'This is an exciting opportunity to study the only taught postgraduate course dedicated to the study of Environmental Geochemistry in the Southern Region of the United Kingdom.' The second paragraph says: 'To promote the launch of this new programme we are introducing a 20% fee reduction for 2020 entry only. [Visit our webpage](#).' Below this is a call-to-action button that says 'For further details please visit our webpage!'. At the bottom, there is a section titled 'WHAT IS ENVIRONMENTAL GEOCHEMISTRY?' with a small image of a landscape. The text in this section reads: 'You will learn how chemicals of environmental concern move through the environment, how to analyse them and how to interpret the data to support environmental management.'

*“The service received by the British Council was excellent. As a result of our e-shot campaign, we saw a significant increase in the number of views on our MSc Environmental Geochemistry webpage.*

*This was also reflected by an increase in applications from certain countries that we targeted. The final report also identified the successful targeted markets, which will help with future recruitment planning”.*

**Stephanie Nicholls, Senior Administrator (International),  
Faculty of Science and Engineering, University of  
Plymouth**

# Save the date – International Education Virtual Festival 2020 30 November – 4 December 2020.

- The theme for this year's event is **Sustainable Futures for International Education**.
- Registration will be announced shortly – please visit our website for more information: <https://education-services.britishcouncil.org/>



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**TO FIND OUT MORE VISIT:**

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