

MARKET INSIGHTS

INTRODUCTION TO POSTGRADUATE (TAUGHT) RECRUITMENT IN THE USA

The US is the UK's 4th largest postgraduate market (10,705 students, 63% PGT, HESA, 2012). The market is expected to grow in line with domestic trends with the UK remaining the first choice destination for internationally mobile American postgraduates.

The market is attractive due to the strong affinity for the UK, ease of access, English proficiency, stability, range of subject interests, quality of students, comparative affordability, and low sensitivity to immigration policy. Students are proactive and acclimate well to the UK.

The US postgraduate market can be challenging due to the lack of a centralized and formal student advising system, low awareness of the UK's education system, costs associated with a mature market, and a vast territory.

POSTGRADUATE EDUCATION

An estimated 2.9 million postgraduate students enrolled in university in 2011 (NCES, 2014). Postgraduate enrollments have rebounded since the temporary decline caused by the recession, with the National Center for Education Statistics (NCES) projecting steady increases through to 2024.

Undergraduate higher education in the US is broad based with students encouraged to explore different subjects through the liberal arts model and general education requirements. As a result, Masters are commonly two years in duration.

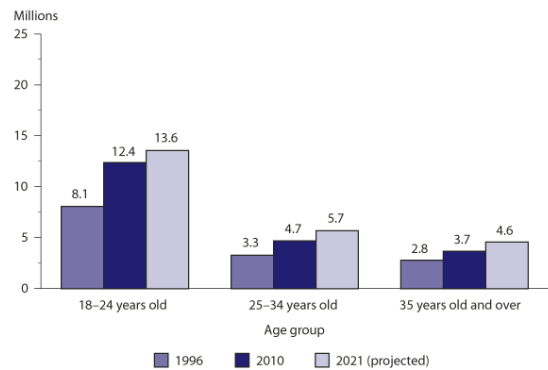
PROFILE STUDENTS

In 2013, the domestic breakdown of postgraduate students in the US was 5% certificate, 83% masters and 11% doctorate (Council for Graduate Schools, 2014). An earlier report by CGS (2007) shows the age breakdown which is particularly relevant for digital marketing targeting and lead generation.

Age	CGS (2007)	HESA (2012)
22-24	18%	32%
25-29	31%	32%
30-34	17%	14%
35-39	11%	-

MARKET PROJECTIONS

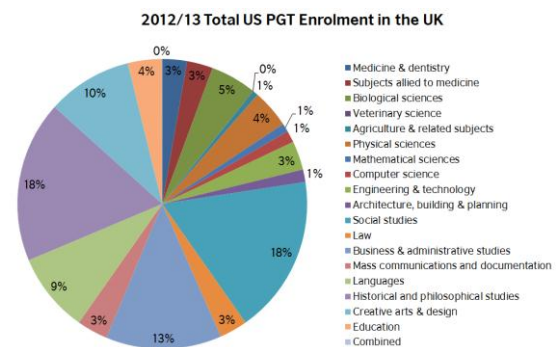
Projected numbers for enrolment in all postsecondary degree-granting institutions, by age group



Sources: NCES (2014).

NCES predicts that the US post-baccalaureate market will grow by 24% each year through to 2023. UK postgraduate enrolments of US students are expected to grow in line with this reaching a total enrolment of 14,800 by 2024. (British Council, 2014).

In the 2012/13 academic year, the US sent 10,705 postgraduate students to the UK. Based on enrolment numbers, the top five courses are in the fields of social sciences (18%), historical and philosophical studies (18%), business & administrative studies (13%), creative arts and design (10%), and languages (9%). The US is also a leading market for professional degrees such as medicine and veterinary science.



Source: HESA, 2012

POSTGRADUATE GUIDANCE COMMUNITY

Whereas undergraduate advising is highly centralized, extensive and formalized, graduate advising decentralized, fairly informal, and has a stronger emphasis on self-led research. Despite this there are organisations that aim to support graduate schools and admissions professionals as a result.

National Association for Graduate Admissions Professionals (NAGAP) is a national association supporting university based graduate recruitment advisers.

National Association of Fellowships Advisors (NAFA) supports university based advisors who assist students with applications for scholarships.

The **Council for Graduate Schools** is a national advocacy, research and development organization for graduate schools.

Independent Educational Consultants Association (IECA) supports independent education consultants who provide guidance on day and boarding schools, university, professional schools and therapeutic programmes.

STUDENT ENGAGEMENT

Digital & Print Marketing is the main form of awareness and lead generation (which includes lead buying). Face-to-face events such as fairs, counselling sessions, and college visits are typically used to aid in conversion.

Graduate Record Examinations (GRE) and **Graduate Management Admission Test (GMAT)** are two standardized tests that help measure a student's analytical, writing, quantitative, verbal, and reading skills. Both offer opportunities for you to purchase leads and deliver advertising campaigns using test takers data.

Idealist is an organization serving the non-profit community and hosts careers and postgraduate fairs across the US every autumn.

Quacquarelli Symonds (QS) hosts graduate fairs in major cities in the USA.

FUNDING

Public higher education is funded at the state level resulting in fee subsidies for in-state students. These subsidies are often enhanced through large scale merit scholarship programmes. As a result, out-of-state students and international students typically pay the same tuition fees. Private universities are typically funded through endowments and tuition fees.

The majority of students use financial aid to meet the costs of attending university. Financial aid is an inclusive term covering all forms of financial assistance that students receive to fund higher education including state and federal grants, loans and work programmes as well as other sources of grants and scholarships. Government assistance is means tested via the Free Application for Federal Student Aid (FAFSA). Universities also provide merit and need based financial assistance. Further loan aid is available through private loan agencies.

Postgraduate students in US universities will use fellowships and assistantships, merit-based aid, to fund their studies. Fellowships are grants and do not need to be paid back, whereas assistantships are positions which requires students to work for the university.

MARKET CHALLENGES

Limited awareness of the wider UK education offer with a small number of UK universities established as known 'brands'.

Need to raise aspirations and build confidence that overseas study is relevant and possible through sharing information with advisors, enabling validation by sharing peer stories and marketing direct to students.

Perception of cost incurred with study overseas, particularly for those who have limited access to guidance resources on UK education.

Marketing and recruitment Face-to-face counselling is most effective when used in conjunction with a strong marketing campaign. Institutional structures often make this challenging for international offices.