

SERVICES FOR INTERNATIONAL EDUCATION MARKETING

Market Briefing

Education UK Business, Banking and Finance Exhibition
November 2016

Indonesia

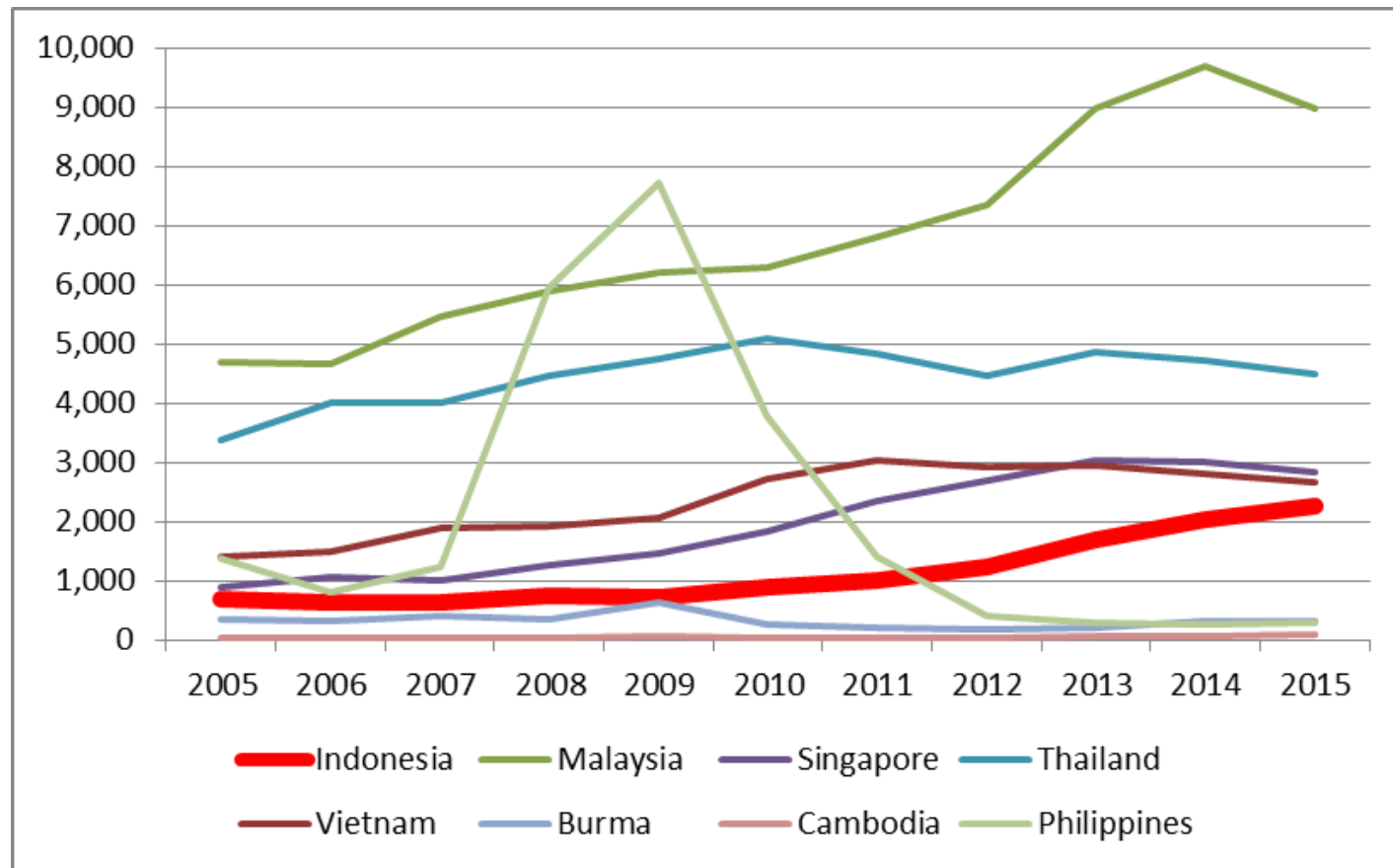


Image borrowed from <http://latitudes.nu>

- I. Indonesia Market Briefing**
- II. Visitor Registration Data
- III. Event Logistics

Indonesia in context

Tier 4 visa issuance by calendar year



Source: UK immigration data, www.gov.uk

Current Market Environment

- The economy is growing, with 4.8% growth in 2015, 5.1% forecast for this year and 5.8% in 2018 (source: World Bank)
- Business confidence is currently at the highest level since 2010 (source: Trading Economics)
- Indonesians' perceptions of the UK
- Predominantly postgraduate market for student recruitment. UCAS application in 2015 has doubled up compared to 2011.
- Strong competition with other study destinations
- Important role of key influencers : Academic Advisors/School Counselors, Parents, Indonesian students in the UK, UK alumni, Agents
- British Council Trained Education Agents : <http://www.bcagent.info/gal/>

Role of overseas education in Indonesia's development

- Local graduate skills gaps compared with what employers need
- Need for skilled workers forecast to grow from 55 to 113 million from 2012 to 2030
- Already reports of structural unemployment, where graduates cannot find jobs because they don't have the right skills, even when there is an overall skills shortage

In the news...

Indonesia's workforce in need of total overhaul

Jakarta Post - 2 Sep 2016

Our university graduates aged 25-65, our youth aged 20-24 without ... projects that Indonesia's high-skill employment will increase by 55.7 ...

It's Getting Harder to Find a Job, Graduates Say

Jakarta Globe - 22 Jul 2016

"I believe structural unemployment is already occurring in Indonesia ... Many bachelor graduates are finding it more difficult to secure jobs as ...

Indonesia Needs More Industry-Ready Graduates: Survey

Jakarta Globe - 1 Nov 2016

The study found that educational institutions often do not train students to meet industry requirements. Indonesia's key growth sector, information and ...

Universities woo Indonesians as part of national plan

University World News - 29 Oct 2016

Forty-nine Taiwanese universities participated in a Taiwan Higher Education Fair in Indonesia that started last weekend with the aim of ...

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Market Challenges

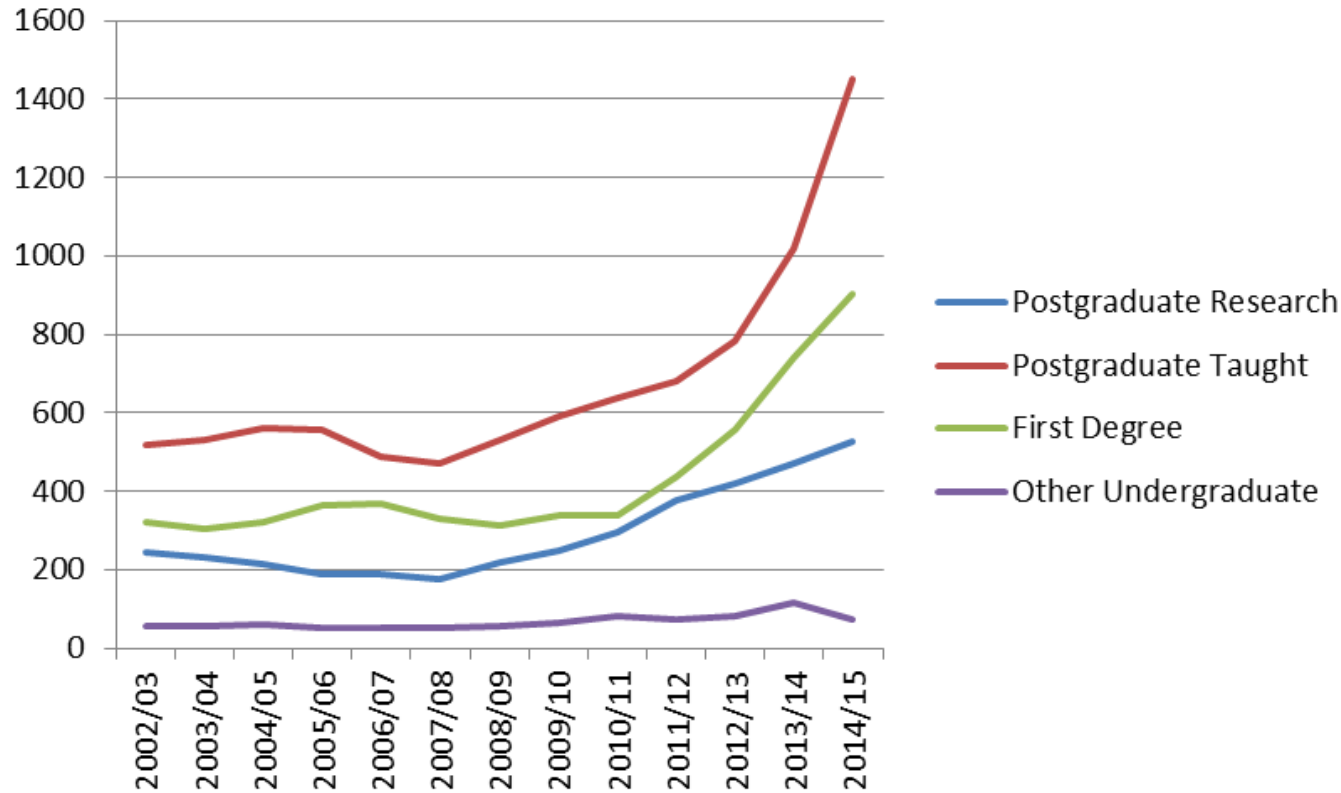
- According to the 2015 Education First (EF) English Proficiency Index (EPI), Indonesia is in the 32nd position, out of 70 countries. Whilst in 2014, Indonesia ranked 28th out of 63 countries.
- Low level of knowledge regarding UK Education.
- Perception of distance of the UK
- Perception of cost vs. Other country destination.
- Post study work visa or opportunity to get permanent resident

What have local stakeholders been telling us?

- More interest in Undergraduate Programmes for UK
- Despite the increasing number of International Schools, Pathway/Foundation Programme is still on demand
- Although subject enquiries are getting more varied, but business and management studies are still the most chosen subject both for PG and UG.
- UCAS familiarization is still needed by many school counselors
- Information session about UCAS, Personal Statement and UK Education System are the top 3 most requested topic from the schools
- Undergraduate scholarships scheme should be considered, although only partial or tuition fee waiver.
- Parents view the UK as a safer study destination country compare to other countries.
- Universities are encouraging their academic staff to continue their study overseas
- 1 year Master programme is still the most popular

Indonesian students in UK: overall trends

Indonesian students in UK HE



2014/15 HESA data:
+10% total HE enrolments
+2.6% in new enrolments

52% UCAS acceptances
in 2015

-10% decline in tier 4
student visa issuance to
Q2 2016

Market Segments

Scholarship programme students

- Students who are academically achieved, but some of them might not be able to afford overseas studies
- Full scholarships programme
- Scholarships that allow them to bring family
- Academics who are encouraged by their institutions to continue their study.

Self Funded

- Students who are able to fully fund their overseas studies
- Mostly are funded by their parents, or they can be at the age where they are financially capable

Scholarships-oriented

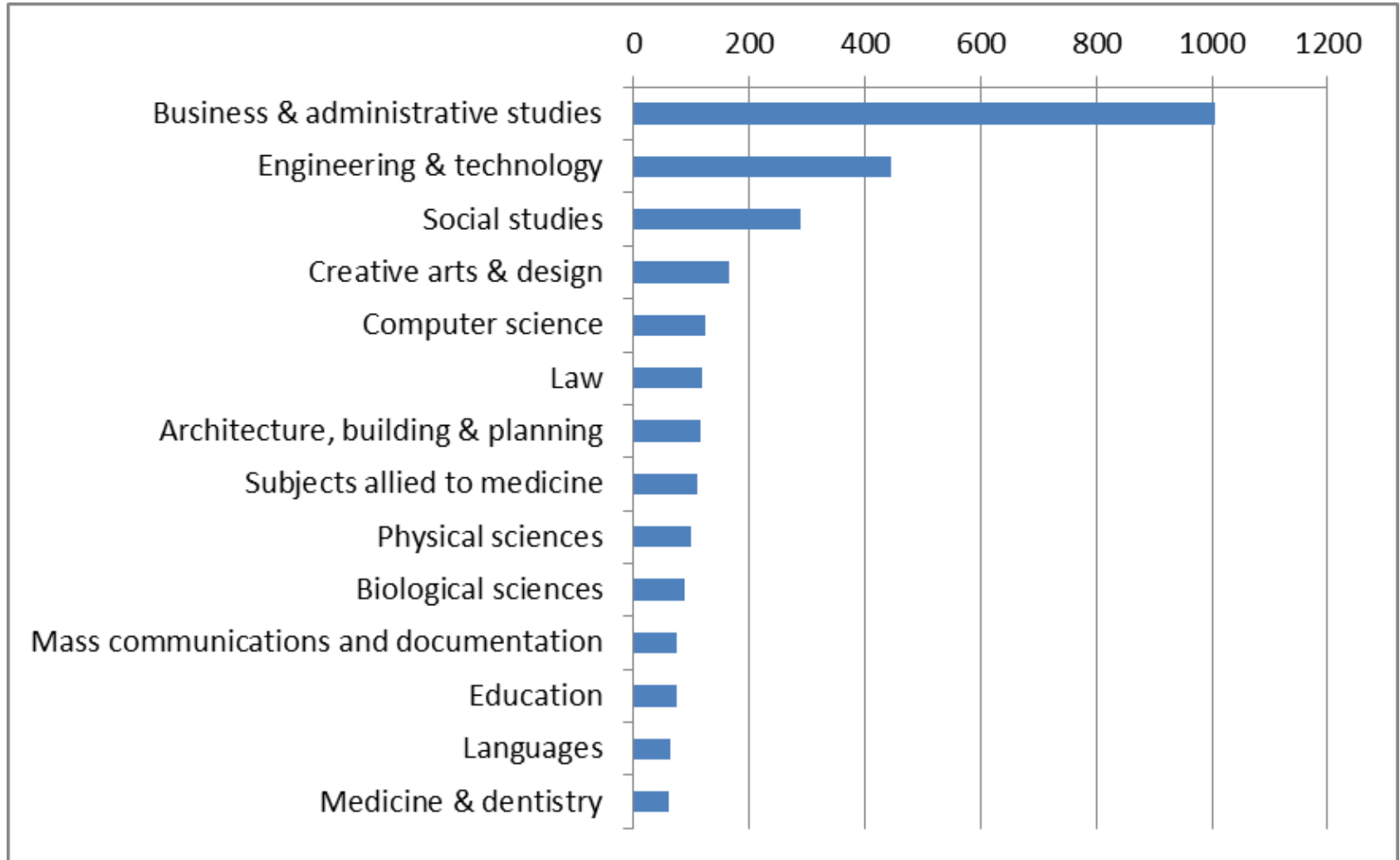
- This usually is the parents who have the perception that getting a scholarship is a badge of honor.
- Some of them can be affluent people, and are not looking for full scholarships.
- Tuition fee waiver could be one of their interest

Scholarship Schemes

- Chevening Scholarships
- LPDP Scholarships
- BUDI scholarship : PhD Scholarships for academics.
<http://beasiswa.dikti.go.id/bppln/index.php/home/pedoman>(see page 22 for the list of UK University)
- PMDSU scholarship : 4 years master to PhD scholarships programmes, aims to identify potential researcher and academic from talented students. At the moment is only available for students from IPB, UI, ITB and Universitas Airlangga Surabaya.
- MoRa Scholarships aim at lecturers in Islamic HEIs.
- Central Bank of Indonesia
- Other ministries scholarships based on their budget and planning

Subject Choice

Indonesian students in UK HE by Subject Area, 2014/15



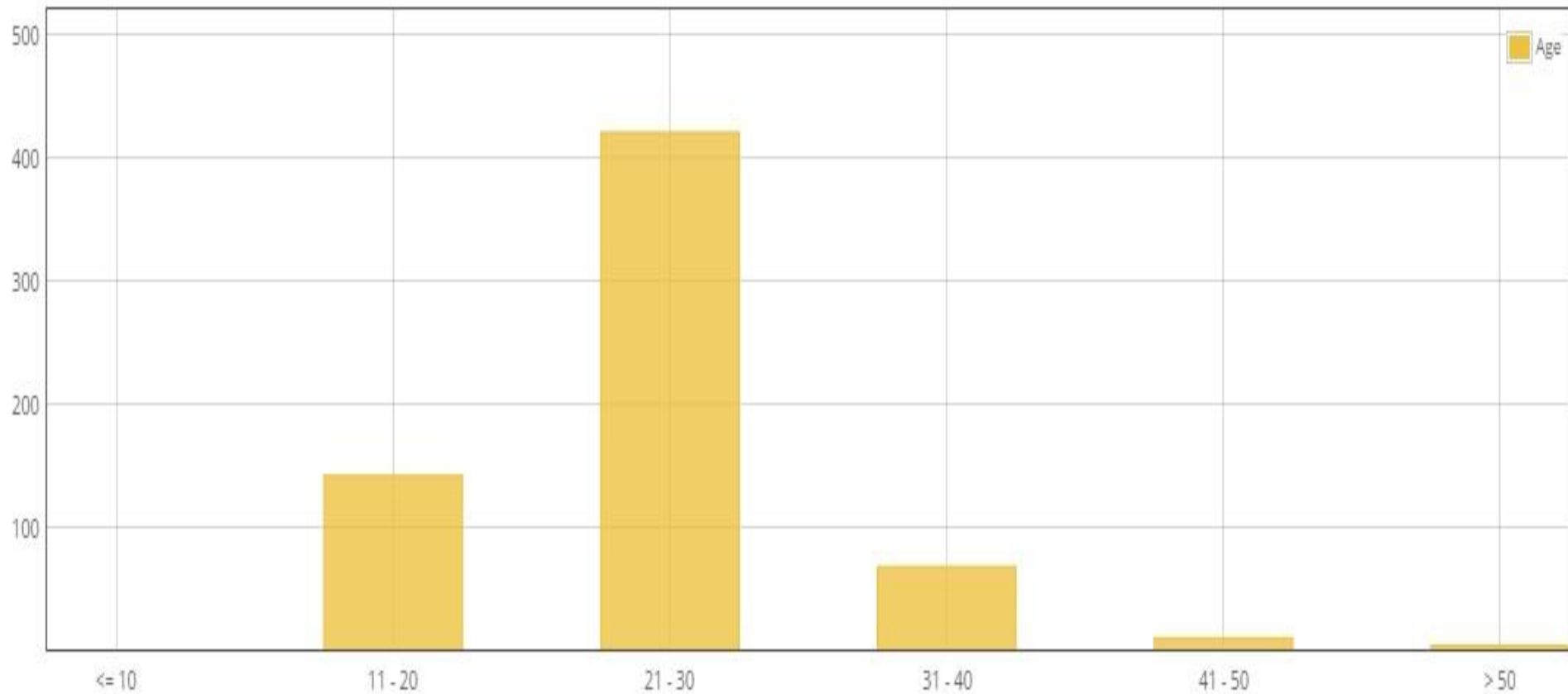
Tactical Messages

- Low level of knowledge about UK - need to educate key influencers
- Locations outside London need introduction
- Break things down;
 - e.g. parents want to know how much to send each month, students need help with subject choice, clear information about language skill development and support
- Complete information on International student support and opportunity at the university, including internship/work placement opportunity if any, clear information about language skill development and support
- Communicate relative costs vs. other countries
- Use Social Media for your campaign : **Facebook, Twitter, Instagram**
- Actively engage with **key influencers** (academic advisors, current Indonesian students in the UK, Indonesian alumni, local agents)
- Get your alumni and student involved on your social media campaign.
- Build network and work with **Indonesian Students Association (PPI-UK)**
- Global recognition of UK degrees
- Scholarships recognition is still significant

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Age of Visitors (students)

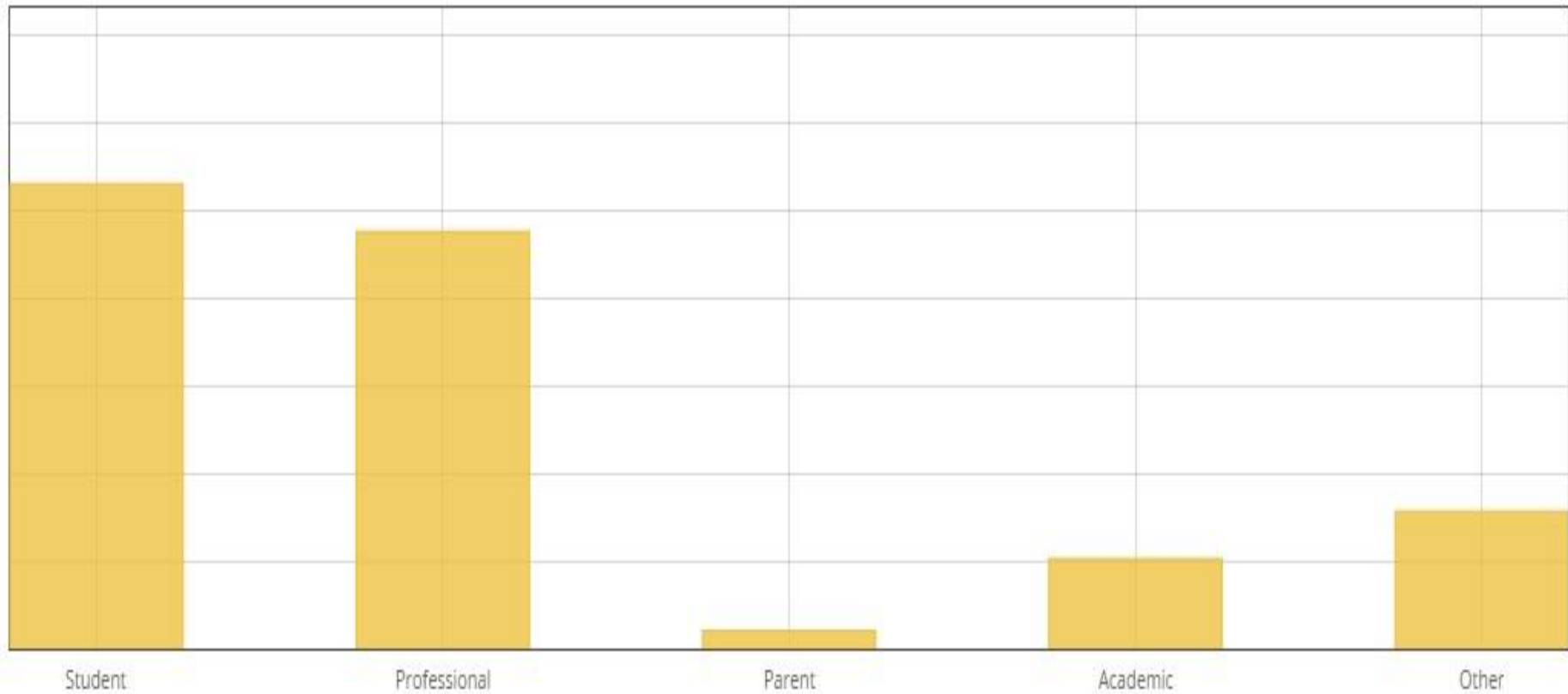
Age of pre-registered visitors - up to 10 Nov 2016; $n = 645$



Source: Visitors registration data 2016

Visitors by occupation

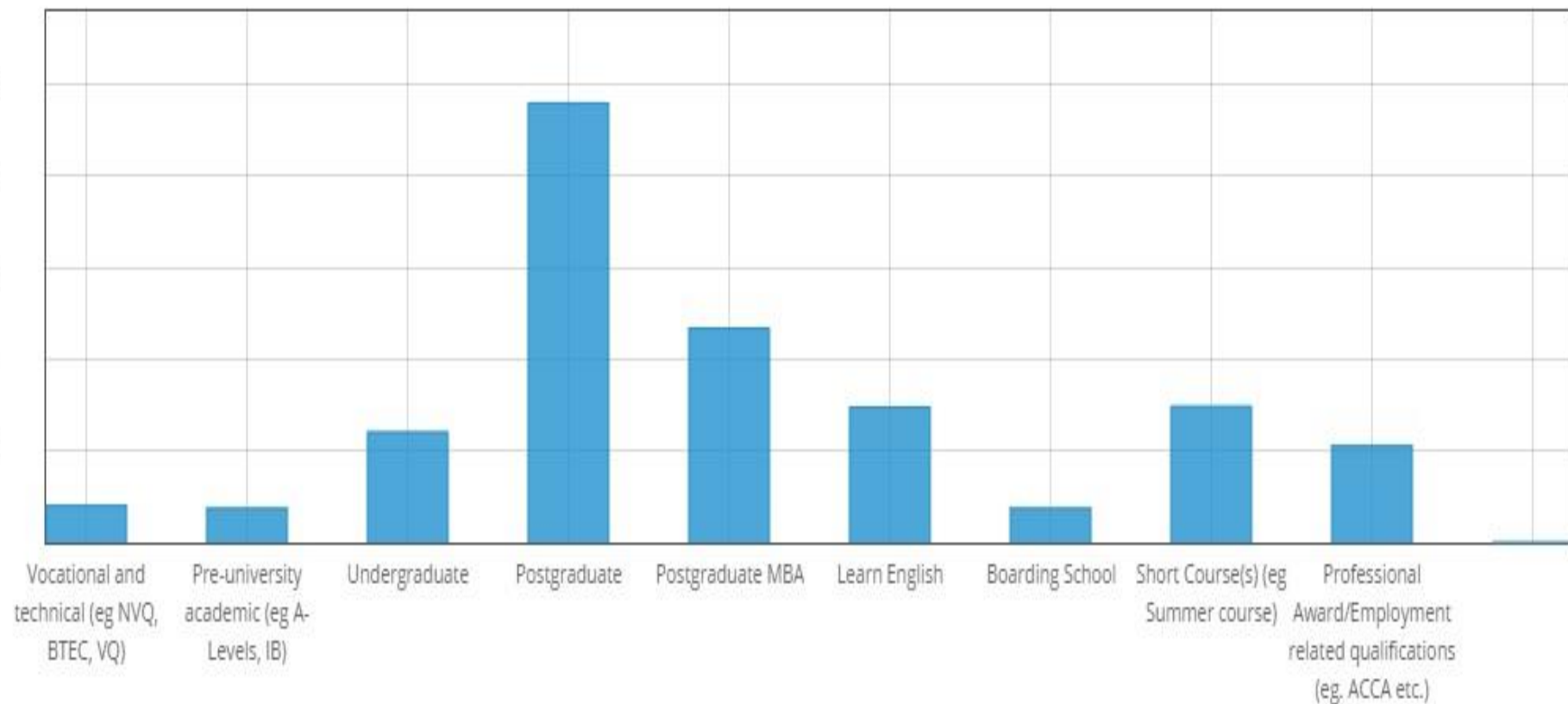
Interests of pre-registered visitors - up to 10.11.16; $n = 645$



Source: Visitors registration data 2016

What level of education will the visitors be seeking?

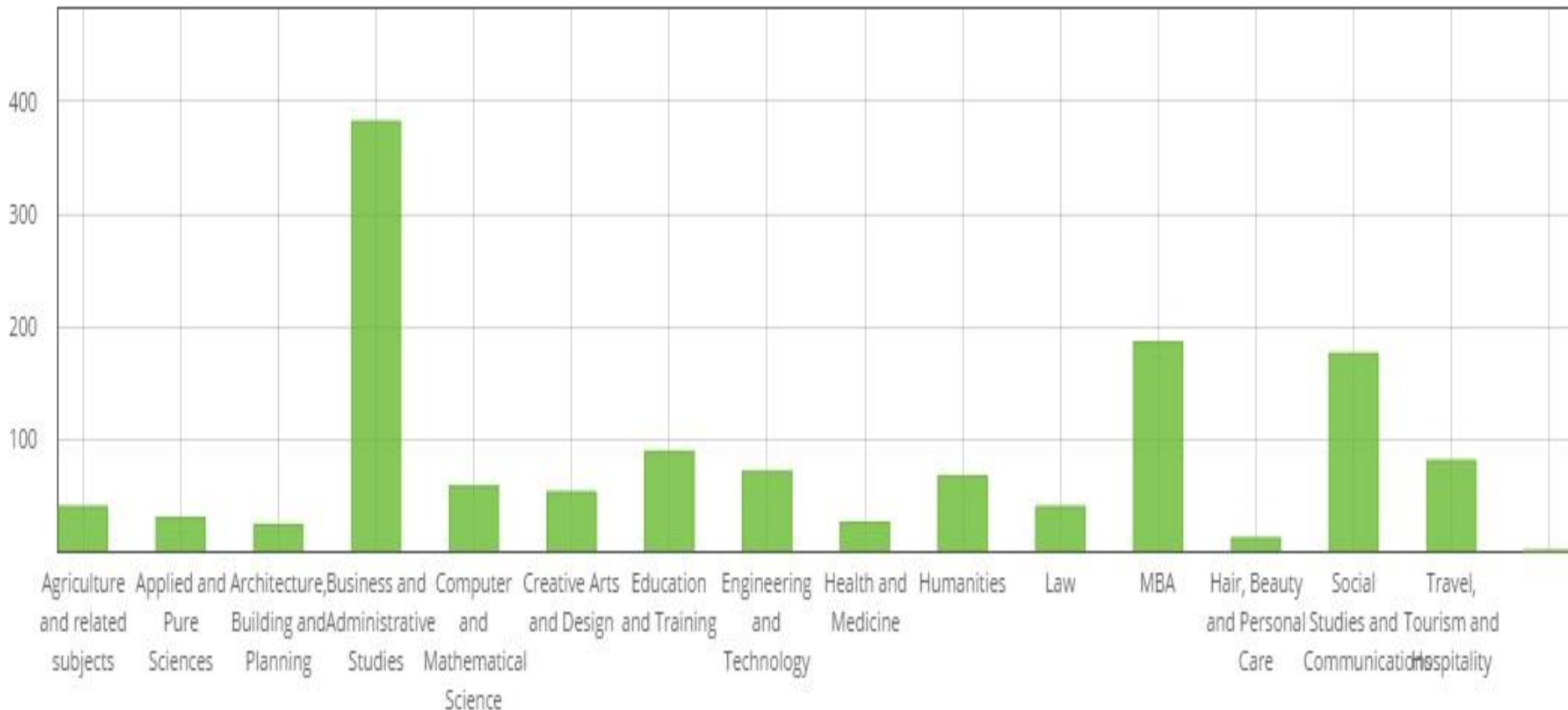
Interests of pre-registered visitors - up to 10.11.16; $n = 645$



Source: Visitors registration data 2016

What subjects are visitors expressing interest in?

Interests of pre-registered visitors - up to 10.11.16; $n = 645$



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THANK YOU

For any query, please contact

Meinanda Chudahman (Nanda)

Senior Programme Manager – SIEM (Indonesia)

Meinanda.Chudahman@britishcouncil.or.id

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