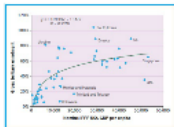




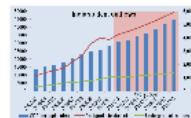
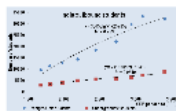
Spotlight 2013

The Student Mobility Equation

Economic



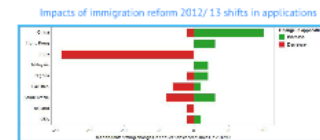
Demographic



However, other factors can impact success in a market



Policy



Perception

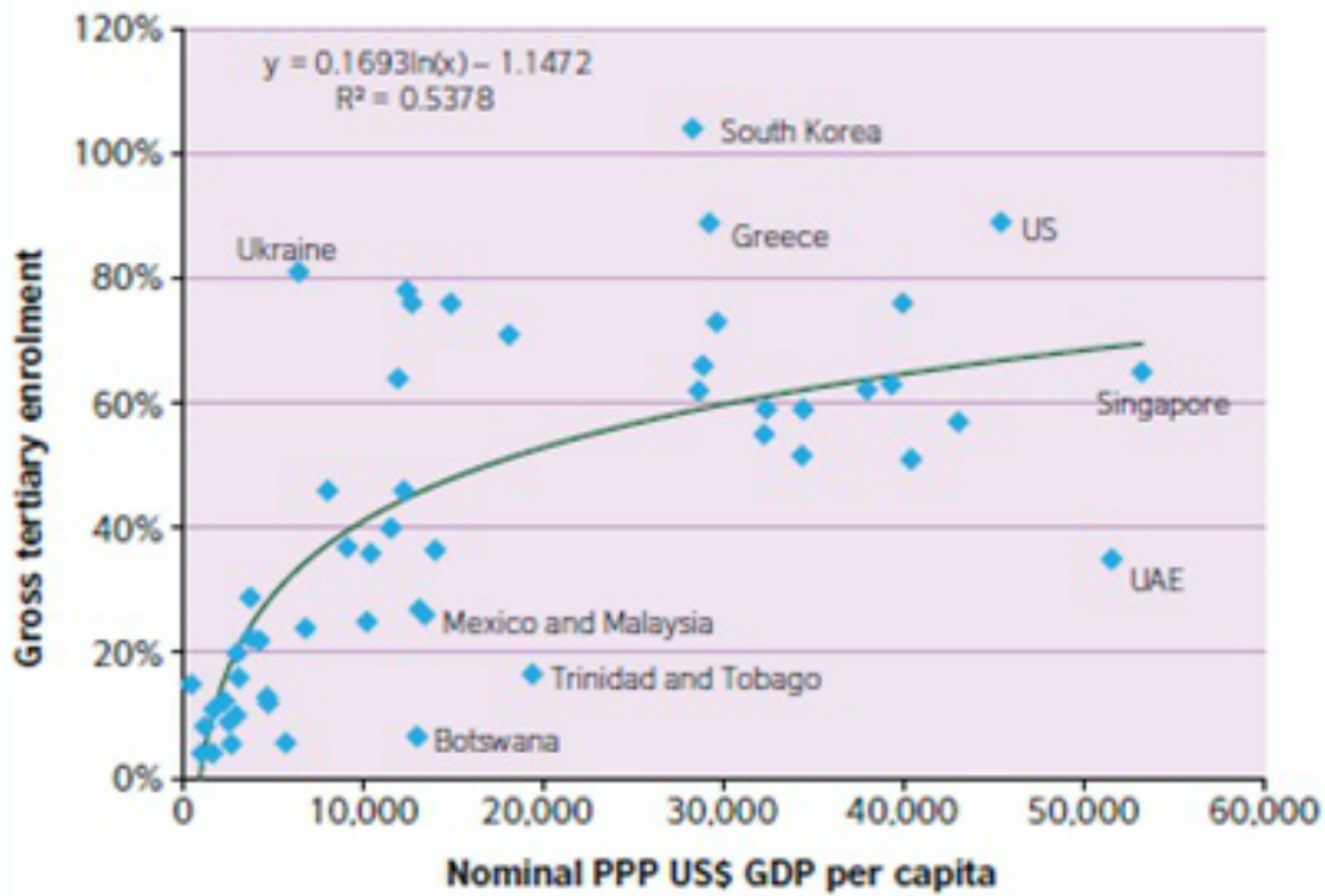
- Indian student market conditions
- Return On Investment
- Impact of visa policy reforms
- Fast paced and unpredictable market shifts
- Mature
- Highly attuned global opportunities



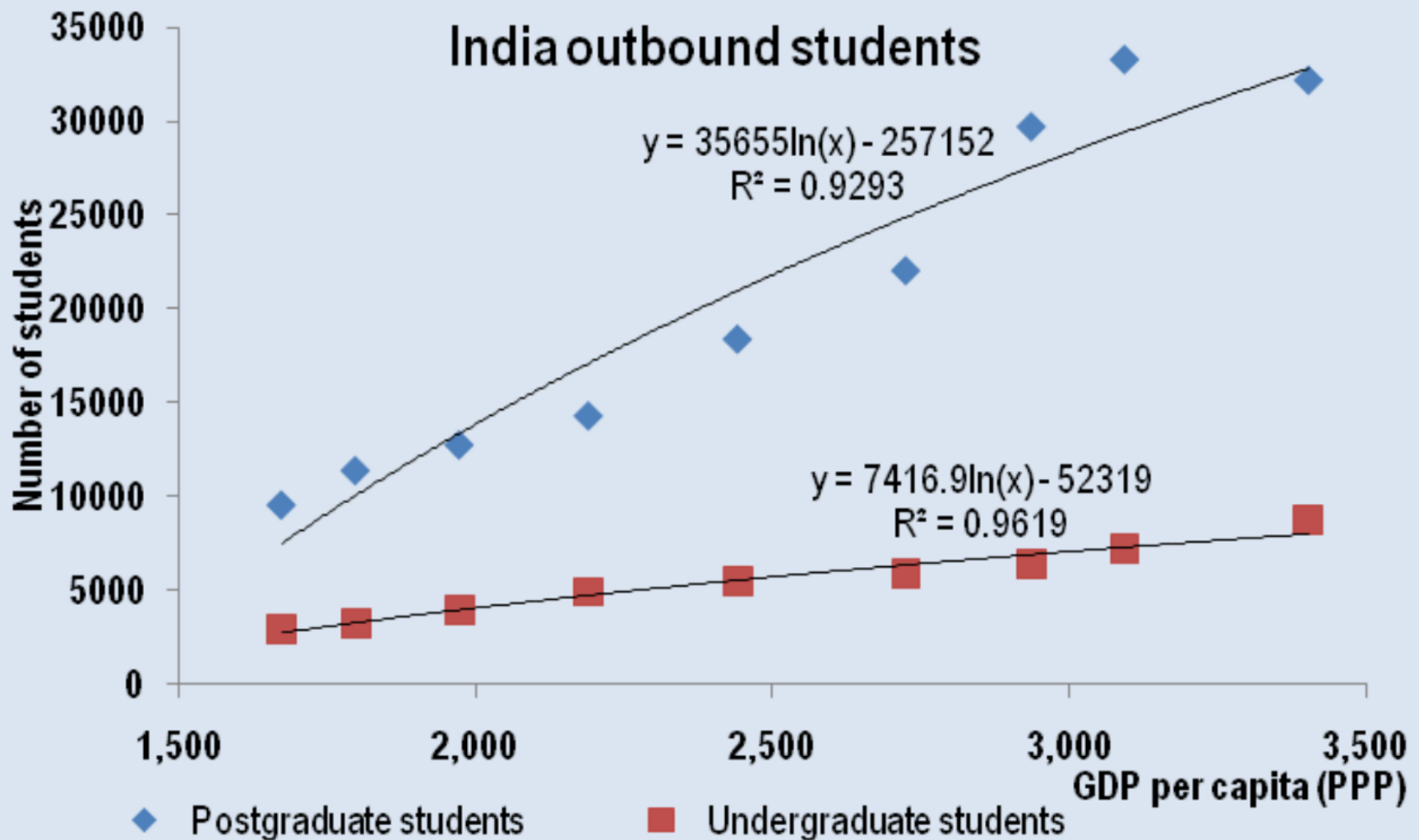
UK market share

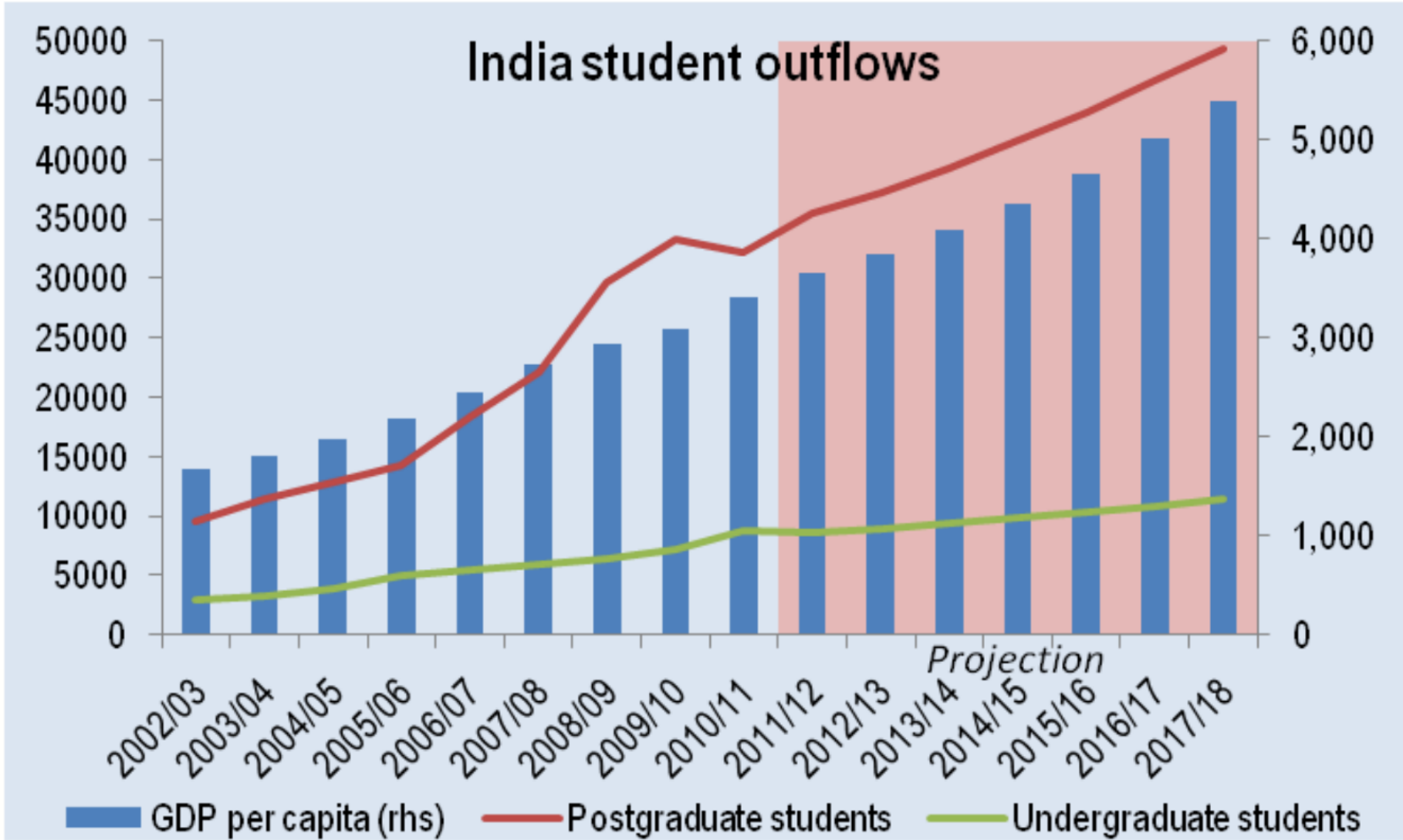
Research has shown that...

Research has
shown that...



India outbound students

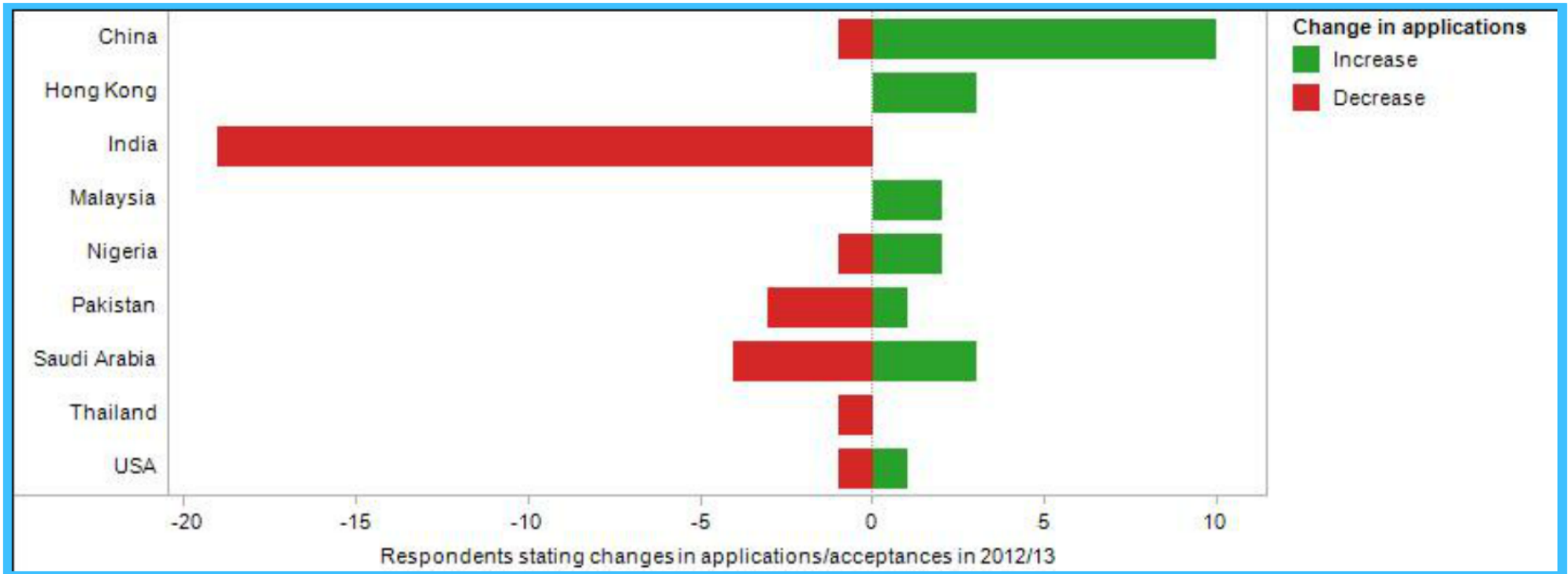




However, other
factors can
impact success
in a market

Policy

Impacts of immigration reform 2012/ 13 shifts in applications

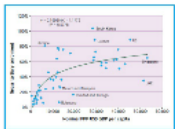


Indian student market conditions

- Return On Investment
- Impact of visa policy reforms
- Fast paced and unpredictable market shifts
- Mature
- Highly attuned global opportunities

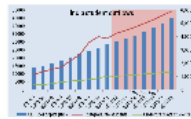
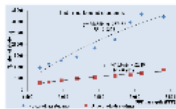
The Student Mobility Equation

Economic



+

Demographic



However, other factors can impact success in a market

+

Policy



+

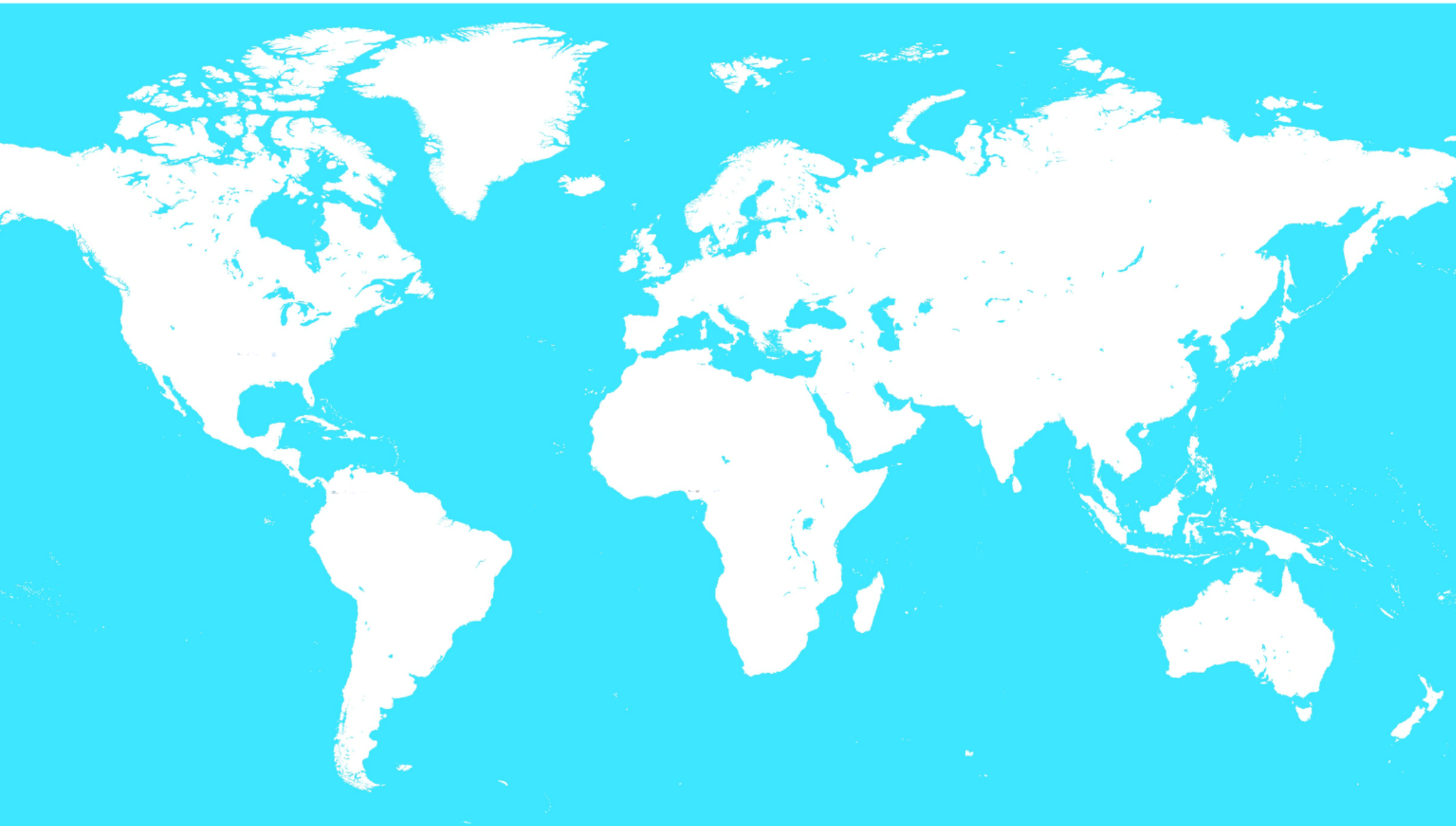
Perception

- Indian student market conditions
- Return On Investment
- Impact of visa policy reforms
- Fast paced and unpredictable market shifts
- Mature
- Highly attuned global opportunities

=

UK market share

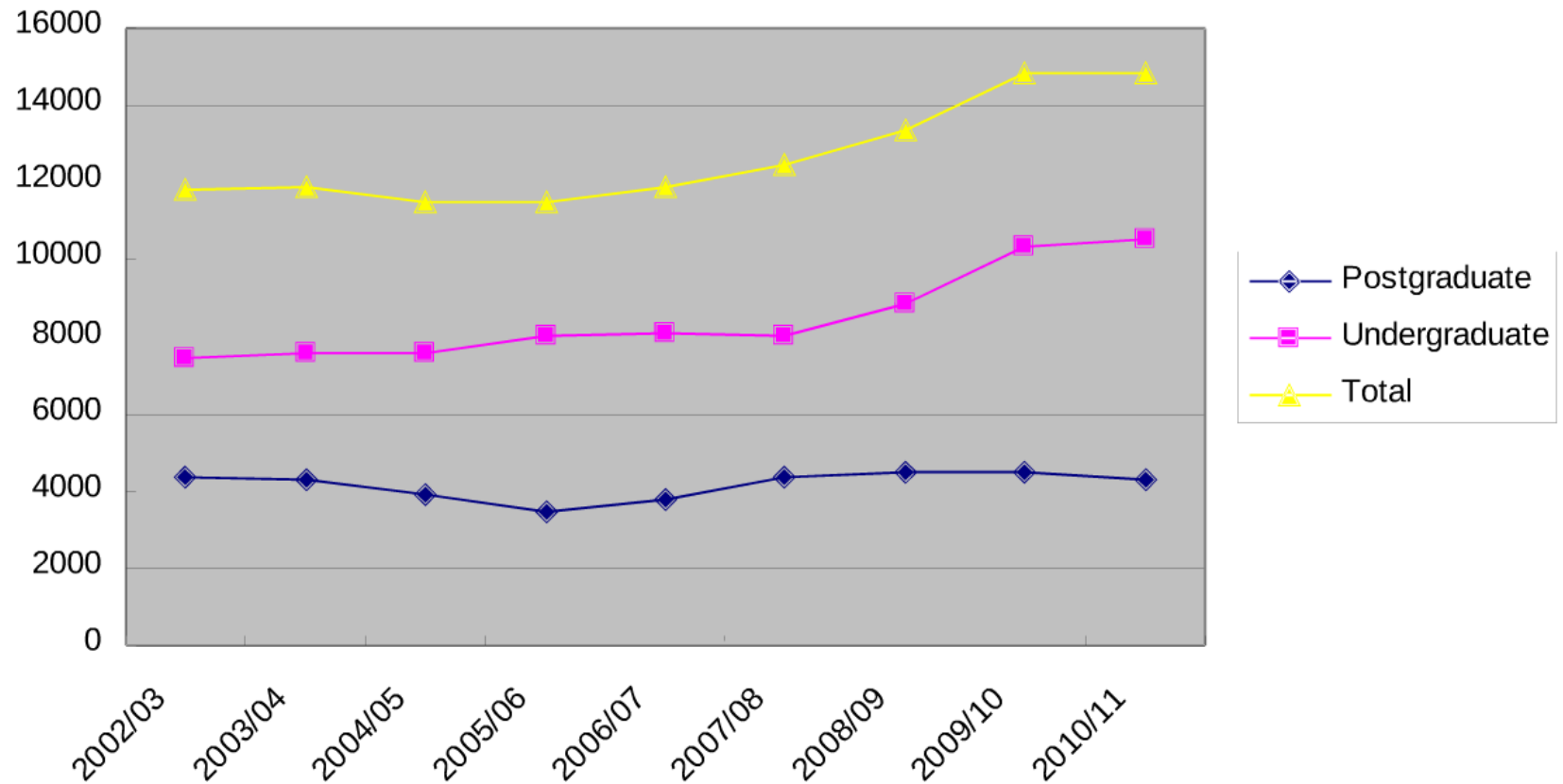
Research has shown that...



Malaysia

World class teaching 'pull' factor to the UK

Malaysian students studying in the UK - UG, PG, total



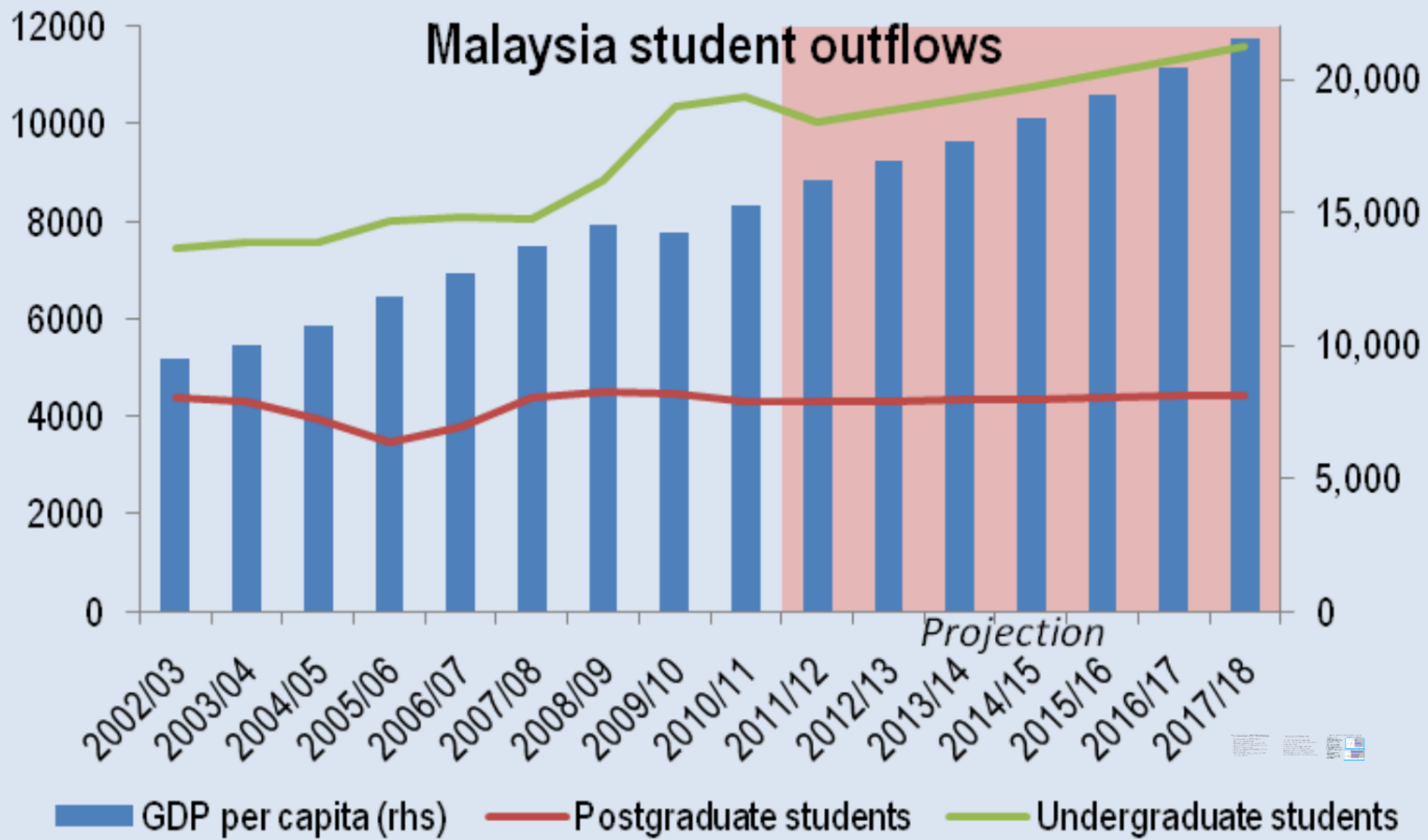
Malaysia - country profile

- Population: 29.1 million
- 681 Higher Education providers; 20 Public Universities, 37 Private, 7 international branch campuses
- 1 million Malaysians in HE, 50% public, 50% private
- Malaysian government aims to grow private education sector six-fold by 2020
- Grow international students to 200,000 by 2020

Education indicators

- In 2012/11 14,865 students total
- Postgraduate growth: -4 %
- Undergraduate growth: 2 %
- Undergraduate growth: Marketing, European languages, English studies
- Malaysian 2012/13 National Education Blue Print
- Internationalisation at the core including outward mobility

Malaysia student outflows



The phenomenon of UK TNE in Malaysia

- 58,115 students studying UK TNE in Malaysia
- 20% increase from 09/10 to 10/11
- 50% registered at overseas partner organisations, 7% distance or flexible learning, 6% overseas branch campus, 37% other than overseas campus
- 91% Undergraduate level, 6% Taught Masters, 2% Higher education certificates
- Between 50 – 70 UK institutions actively deliver TNE programmes in Malaysia

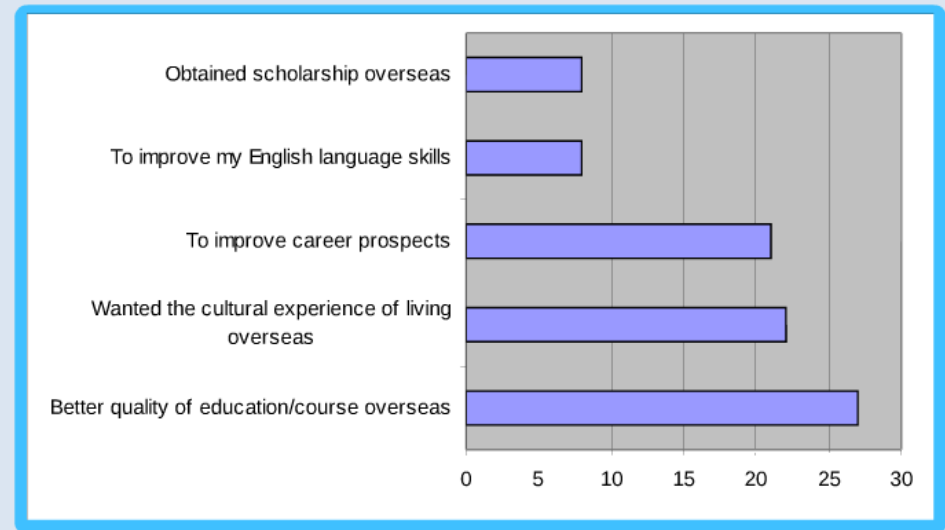
The next phase of TNE delivery

- Anticipated due to maturity of TNE market
- Confidence in Undergraduate provision; staff embedded and students graduated
- Trend towards increased Postgraduate delivery
- Connection of home and TNE components
- Movement from branch campus to branch faculties
- Greatest success experienced from mutual benefit
- Key is contribution to the local community and economy

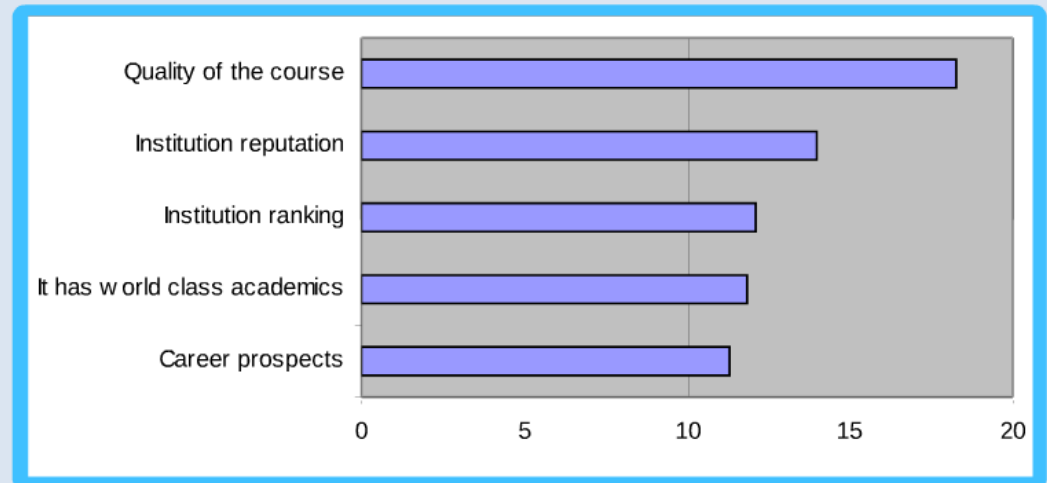
Malaysian student perspective of studying in the UK

- 80% study overseas, 20% combination at home and overseas
- 83% of respondents wanted to study at UK institutions, 7% Australia, 4% USA
- UK seen as a provider of high quality education, international recognised qualifications, Universities good reputations
- Prestige associated with 'on campus' experience
- Classroom learning; critical/analytical thinking
- Excellence in academics, facilities
- Opportunities for professional network building

Why would you choose to study in the UK?

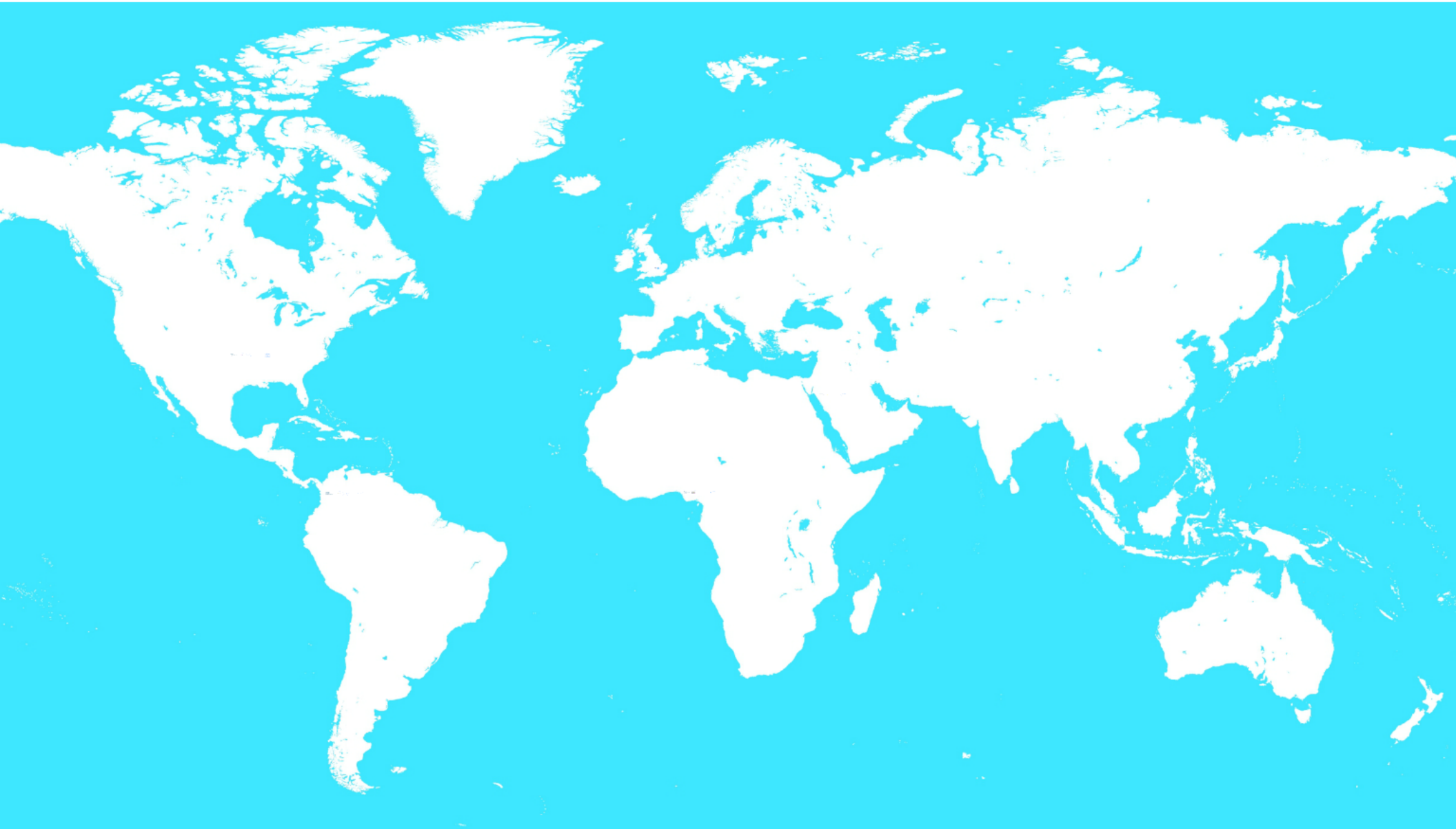


What are the most important factors about UK institutions?



Malaysia in the Spotlight

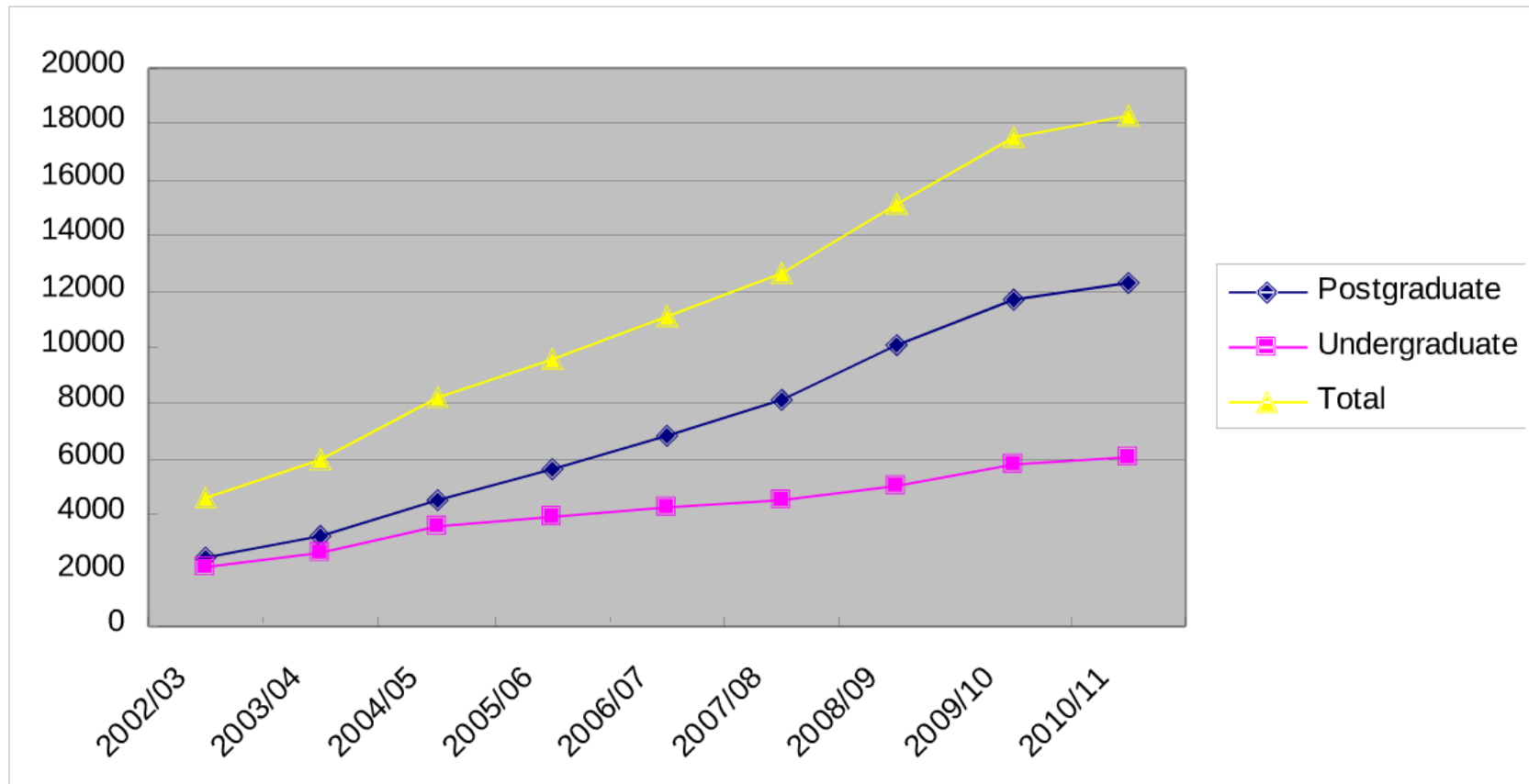
- Strong positive perception of the UK in Malaysia, yet to peak
- Likely to see sustained growth, strong AUD contributing factor
- Strong undergraduate market that could continue to grow if economic conditions remain stable
- UK - Malaysia relationship well established and evidenced
- Quality defined by world class academics
- 'On Campus' experience is sought after by students
- TNE is not a direct competitor, its presence and successful implementation acts as an endorsement of UK Plc directly
- Two clearly distinct markets: direct recruitment and TNE



Nigeria

**UK provides essential skills for the
labour market**

Nigerian students studying in the UK - UG, PG, total



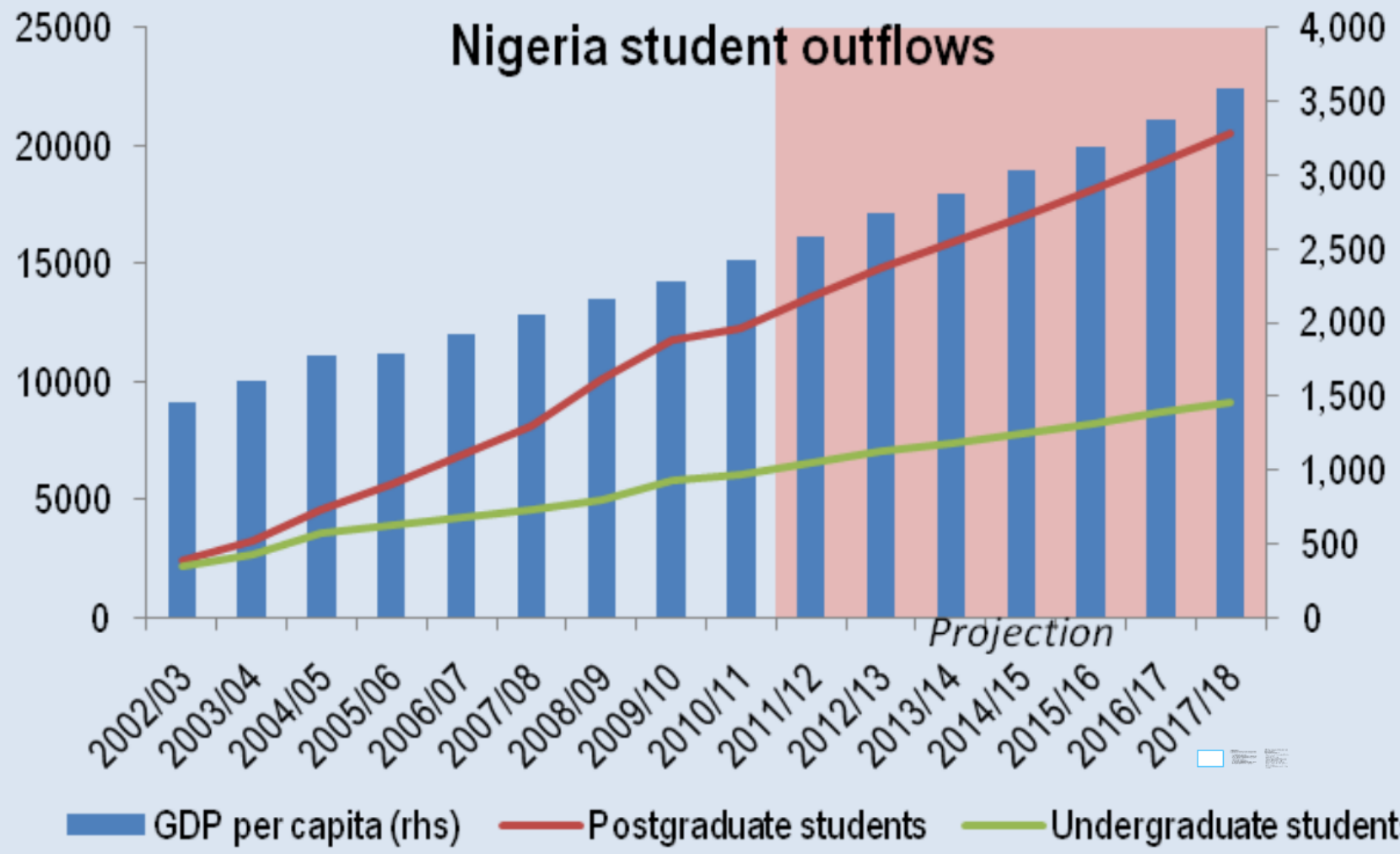
Nigeria - country profile

- Population: 170 million
- 44% of the population is 0 – 14 years
- 45 million internet users, 25 % of the population
- 60 % of the population does not have a bank account
- 59% of the population has a mobile phone

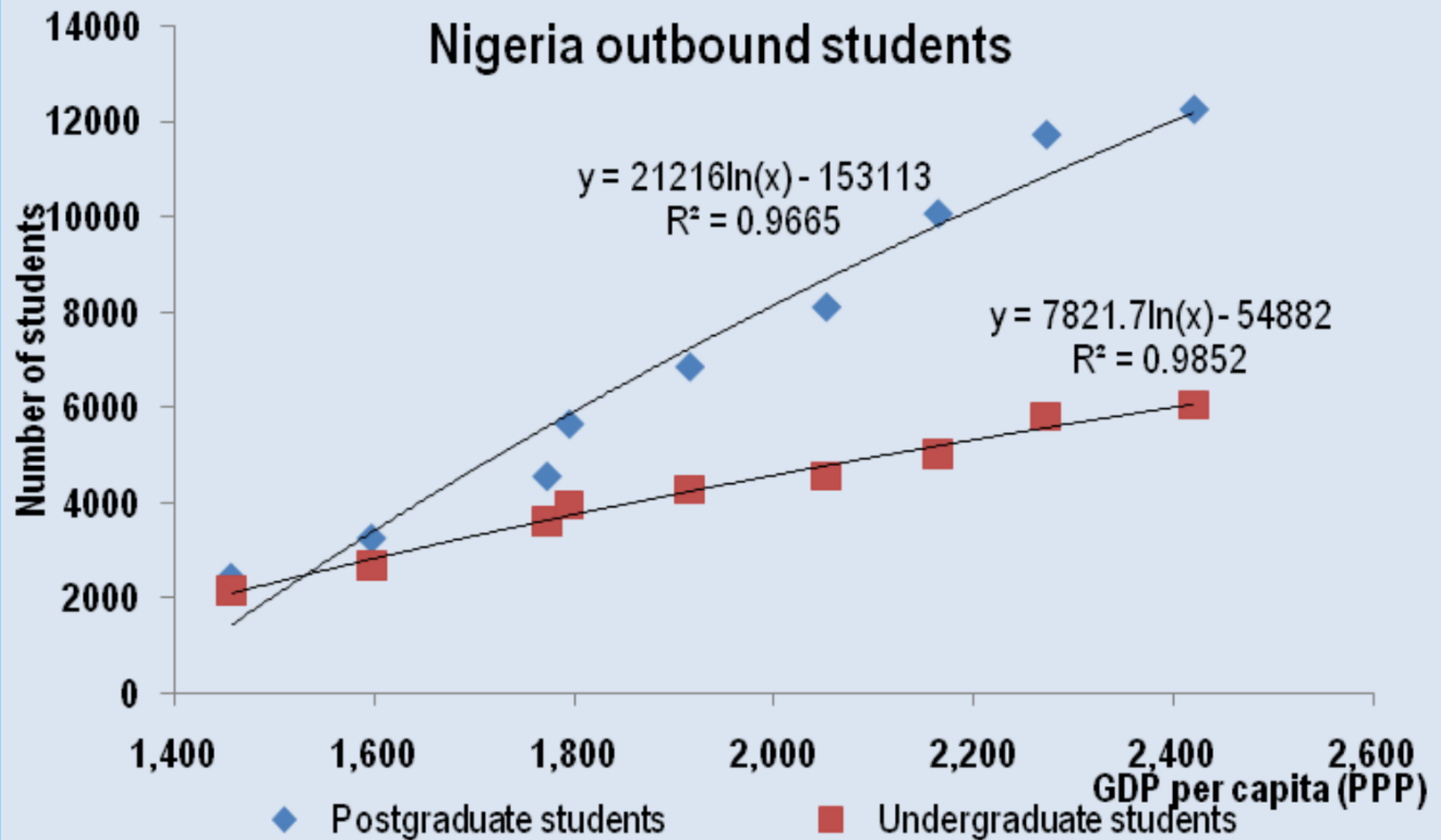
Education indicators

- Gross enrollment ratio: 7%
- 18,325 students in 2011
- 33% Undergraduate
- 67% Postgraduate
- PG - 89% nursing, 25% Pharmacology and pharmacy
- UG - 53% Medical Technology, 26% Clinical Medicine, 20% Biology

Nigeria student outflows



Nigeria outbound students



Student Insight:

Early indications of the impact of immigration reform

- 47% of students use agent services
- Service most in demand: information on obtaining a visa
- Visa perceptions based on: information read, experience of friends, stories from others
- 69% have friends/ relatives in the UK
- UK education: High quality, internationally recognised, offers Nigerian graduates better career prospects

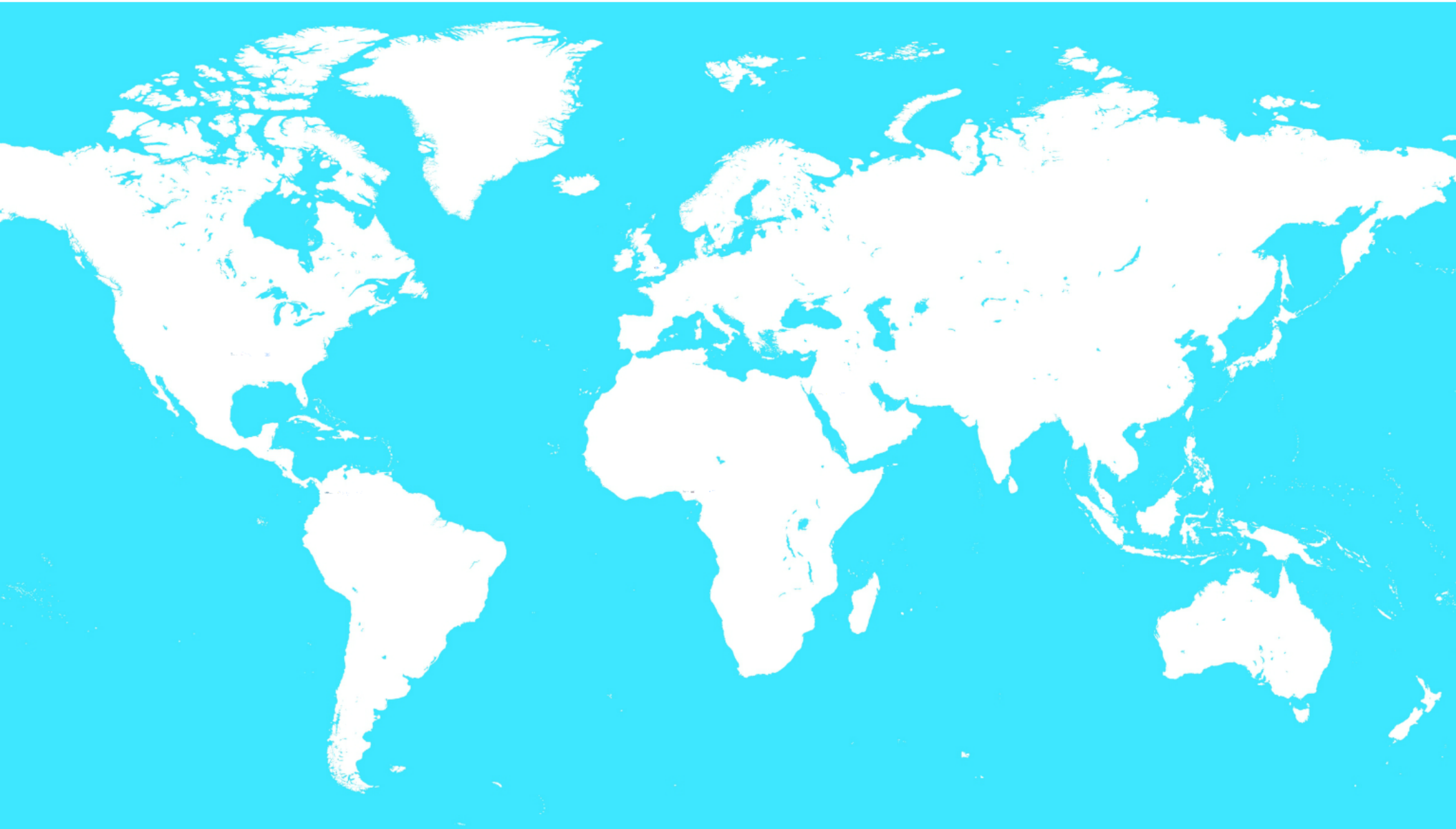
"Skills Mismatch Among University Graduates in the Nigeria Labor Market"

University of Ibadan, Nigeria, 2012

- UK graduates are seen as 80% more employable than home education counterparts
- Skills mismatch of 60.6% identified
- Deficiencies found in: communication, IT, decision making, critical thinking, interpersonal relationships, entrepreneurial, technical, numeracy skills
- High rate of Nigerian graduate unemployment
- UK is perceived to provide these skills as part of wider Higher Education offer
- UK encourages critical thinking via innovative teaching and learning

Nigeria in the Spotlight

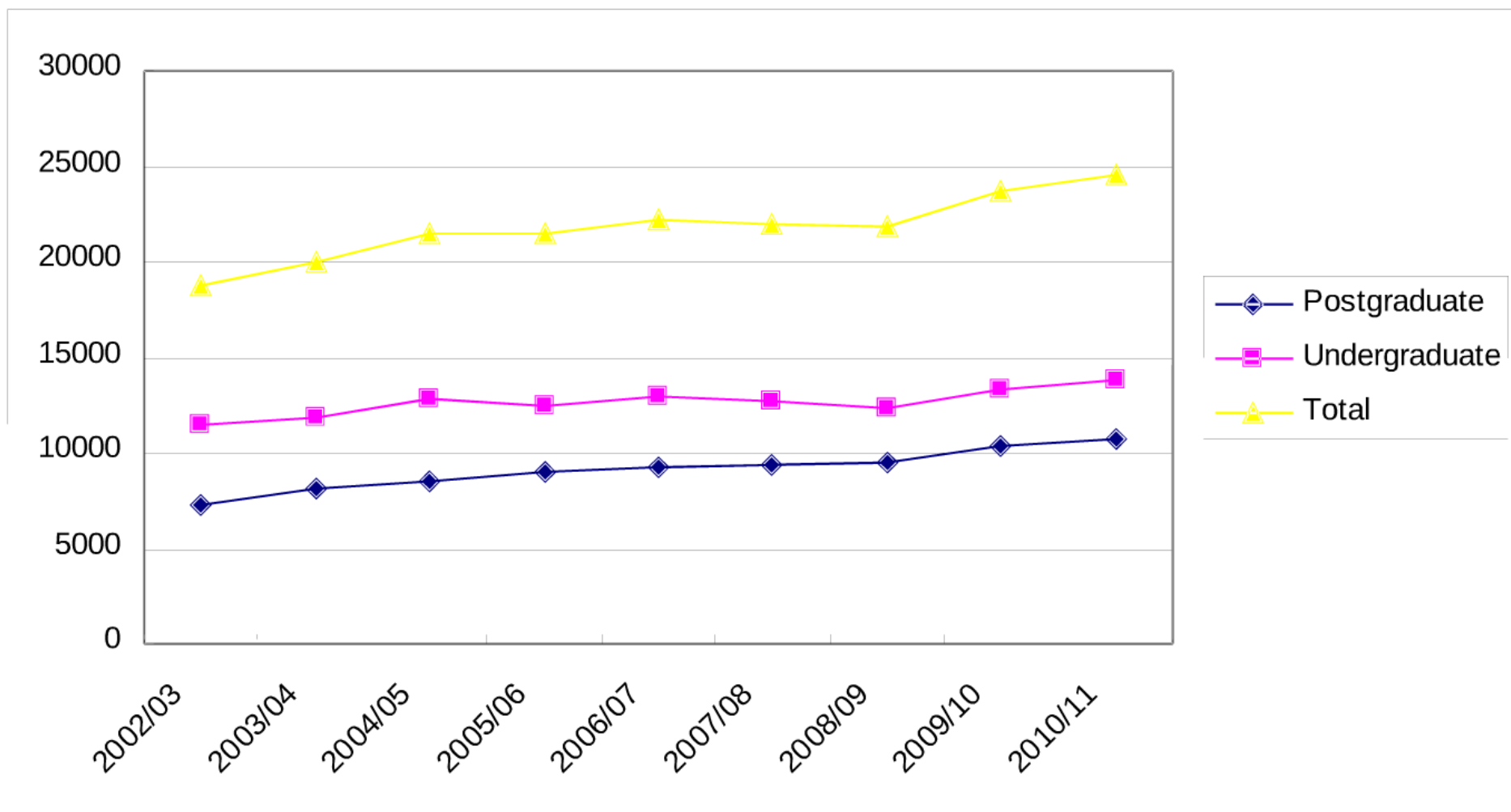
- R squared value for Post and Undergraduate very high showing income is a key determinant to student flows
- Growing wealthy demographic, but low income country
- UK perceived positively, but visa reform may impact global market share
- Known culture; diaspora community
- UK proven quality skills provider
- UK Higher Education providing better graduate employment prospects
- But, will forecast match economic and political reality?



USA

**Special relationship based on cultural
connection**

US students studying in the UK -UG, PG total

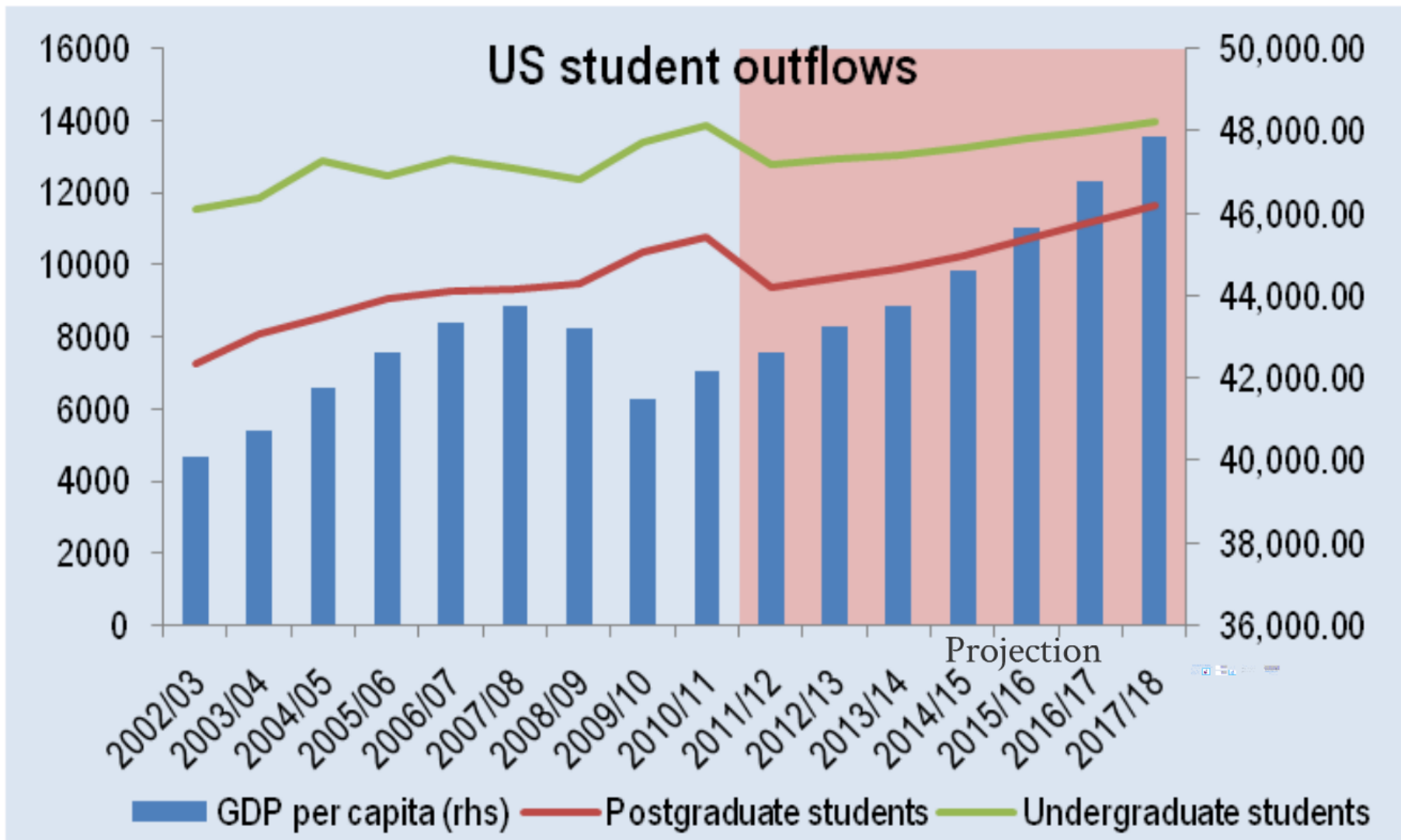


USA - country profile

- 2011 population: 311.6 million
- World's largest economy
- World Bank income level: High
- GDP at US\$15.09 trillion in 2011
- Gross enrollment: 95%
- Government expenditure on education: 5.4% of GDP

Education indicators

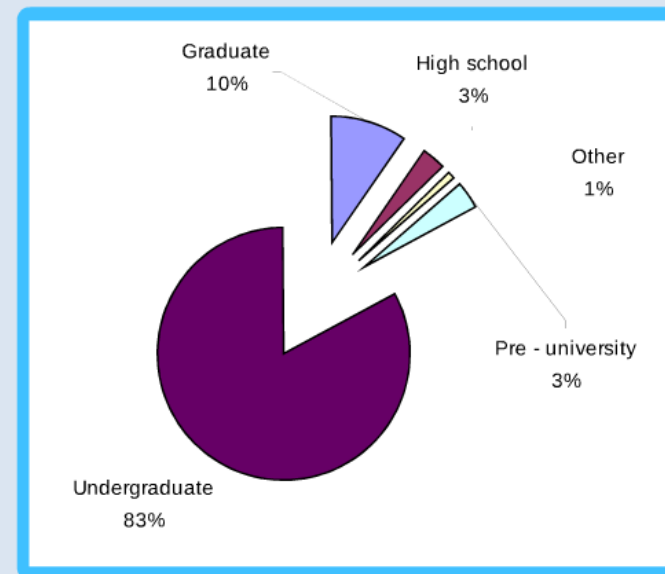
- 24,605 total students 2010/11
- Undergraduate 56%, Postgraduate 44%
- 56% short term, international visiting and exchange
- Largest Undergraduate growth: English studies, Social studies
- EducationUK.org 3rd highest searched



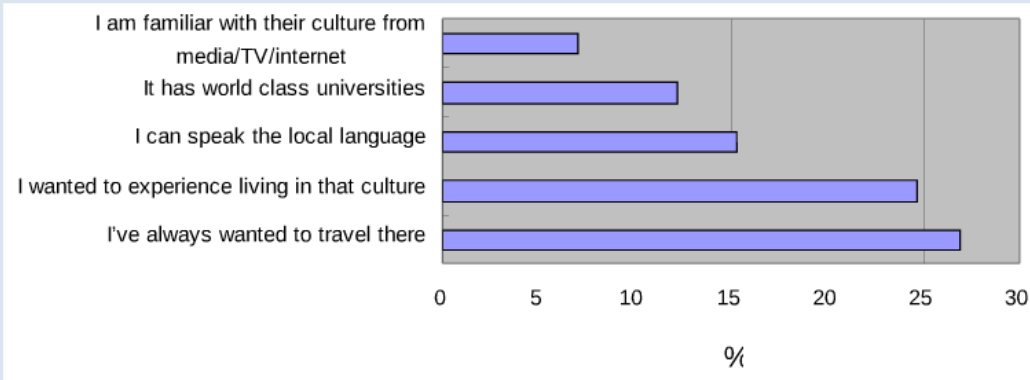
Understanding the UK - US relationship

- 8400+ online respondents
- 57% considering Study Abroad
- 22% chose the UK
- Spain 11%, France 11%, Italy 8%, Australia 6%, Germany 5%, Japan 5%, China 3%

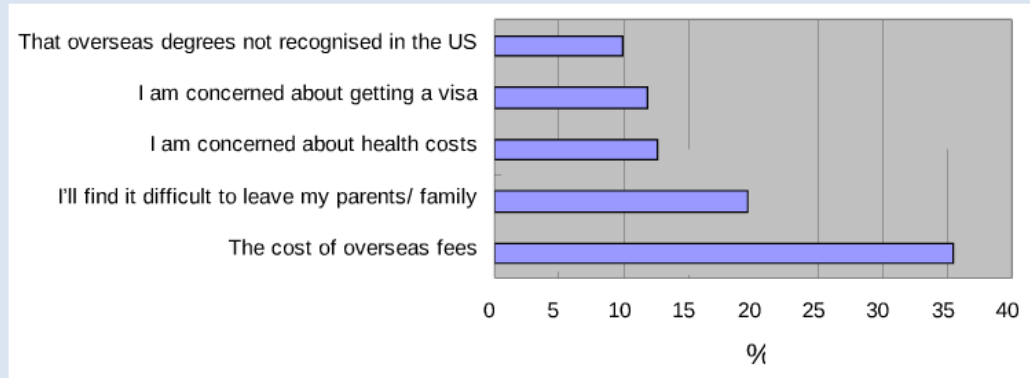
At what level do you want to study overseas?



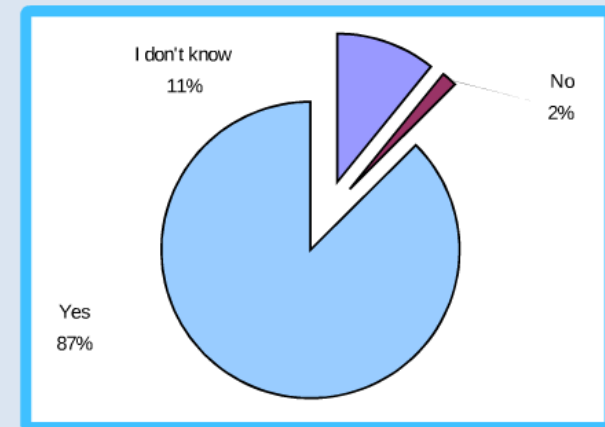
Why do you want to study in the UK?



What concerns you most about it?



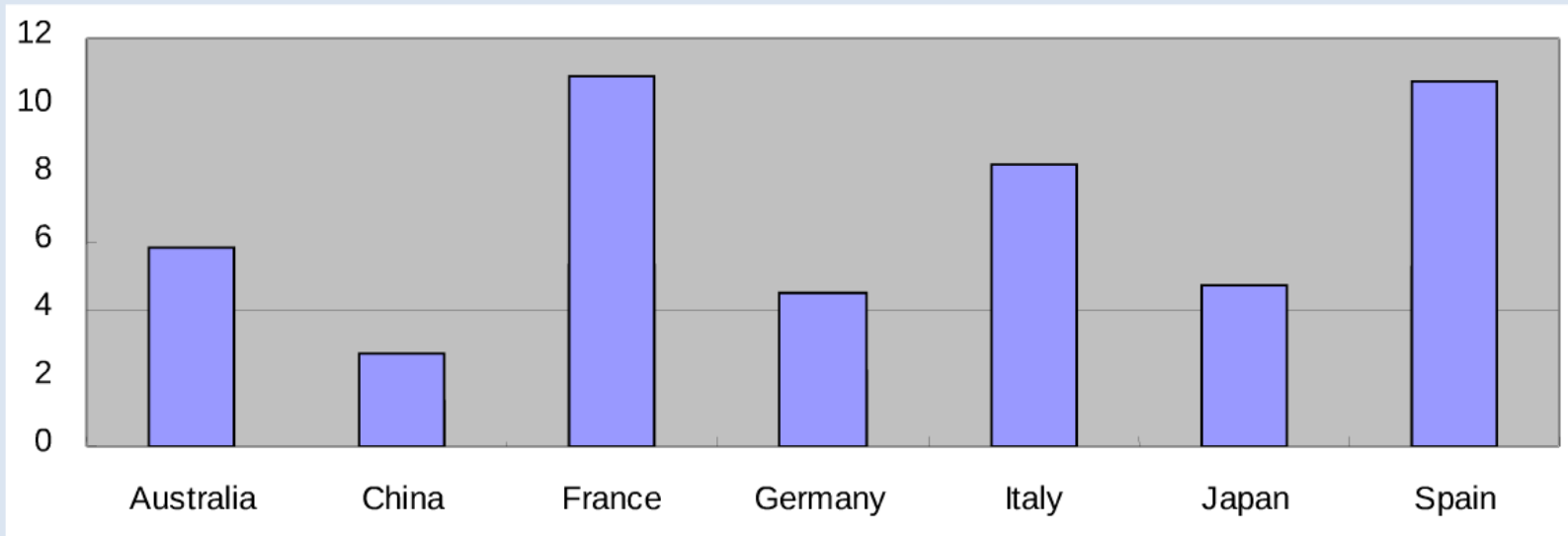
Do you think a study abroad experience could give you the edge you need to stand out when applying for jobs in the future?



Of the two statements below about study abroad, which is most important to you?

The experience would introduce you to new cultures, give you a cosmopolitan identity and allow you to travel 73%

The experience would set your resume apart from the crowd when applying for a job 27%

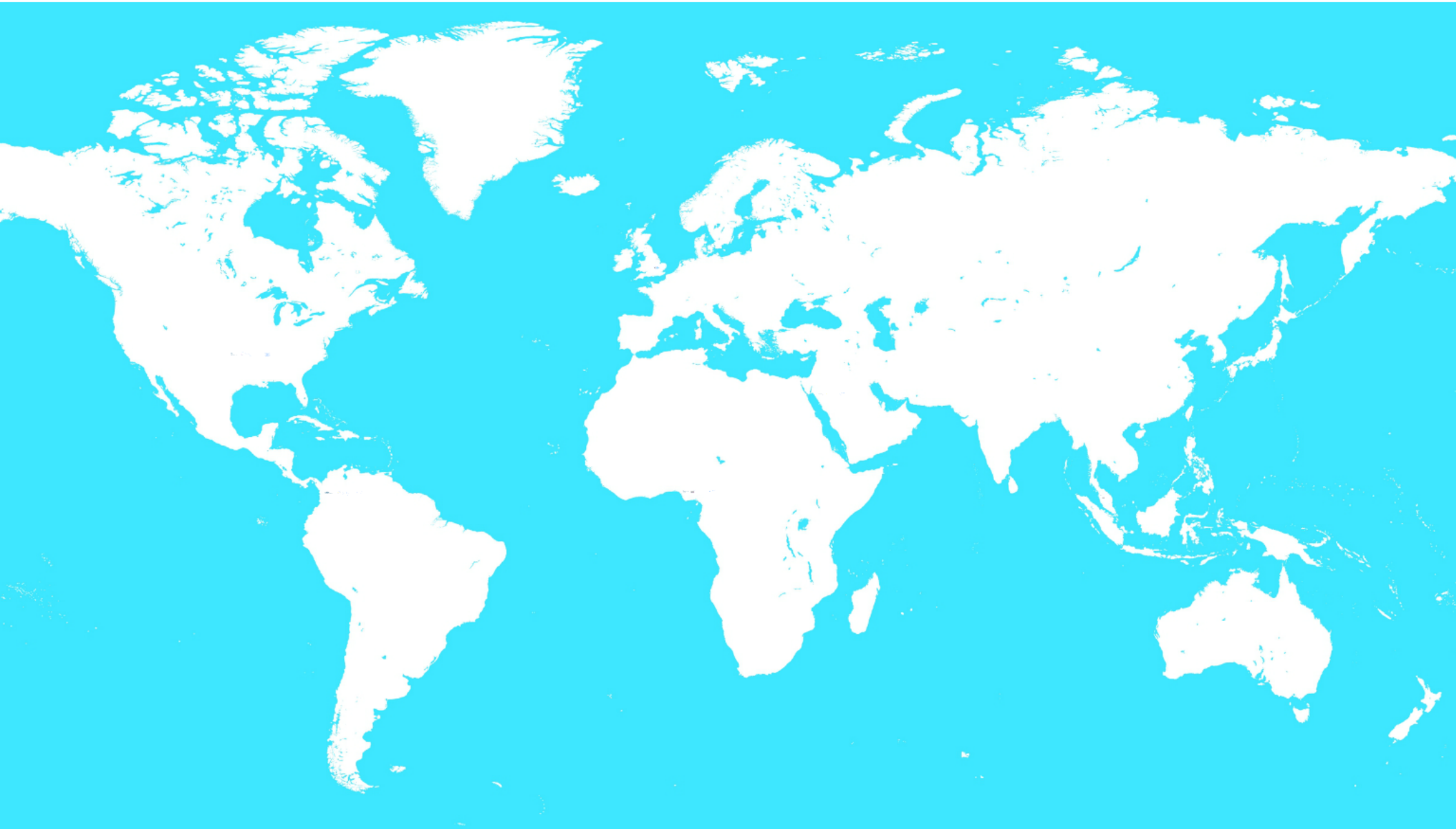


Why study in competitor markets?

- To improve foreign language skills
- Because I received a scholarship
- To earn credits for my field of study

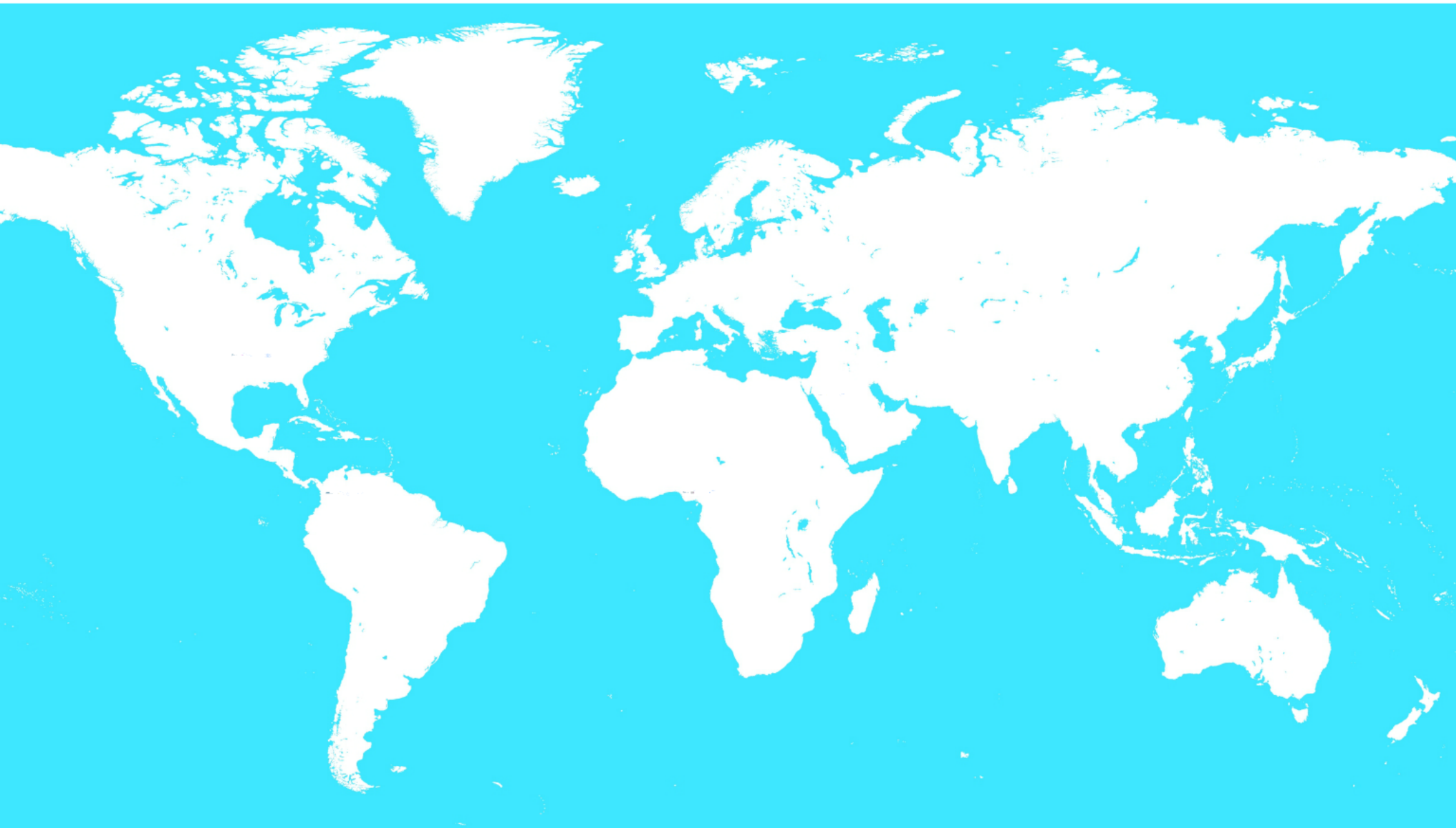
US in the Spotlight

- Plateau in US student numbers but sustained flows
- US perspective of UK very positive
- US institutions actively encourage cultural immersion to develop soft skills
- UK seen as 'Cultural Icon', well positioned to capitalise on soft skill development
- Students place higher value on experiential value of the UK experience
- Increasingly as academic mobility is pursued, other destinations could be favoured over the UK



Online Sentiment Audit

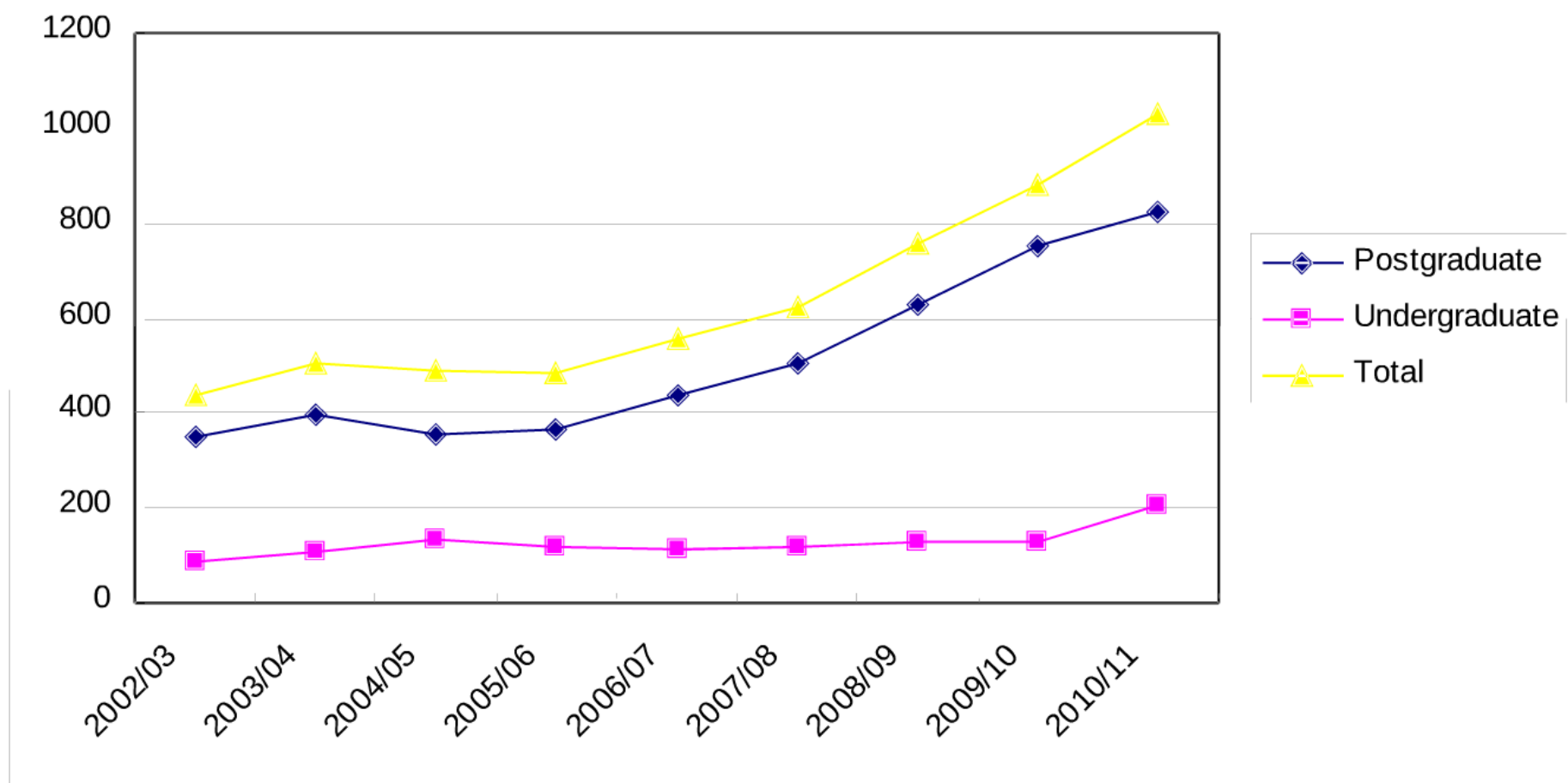
Working with online media audit specialists we tapped into student-specific online communications and discussions, in both English and local languages, to analyse common perceptions of, sentiment towards and interests in UK education in emerging markets



Colombia

English language teaching 'pull' factor to the UK

Colombian students studying in the UK - UG, PG total



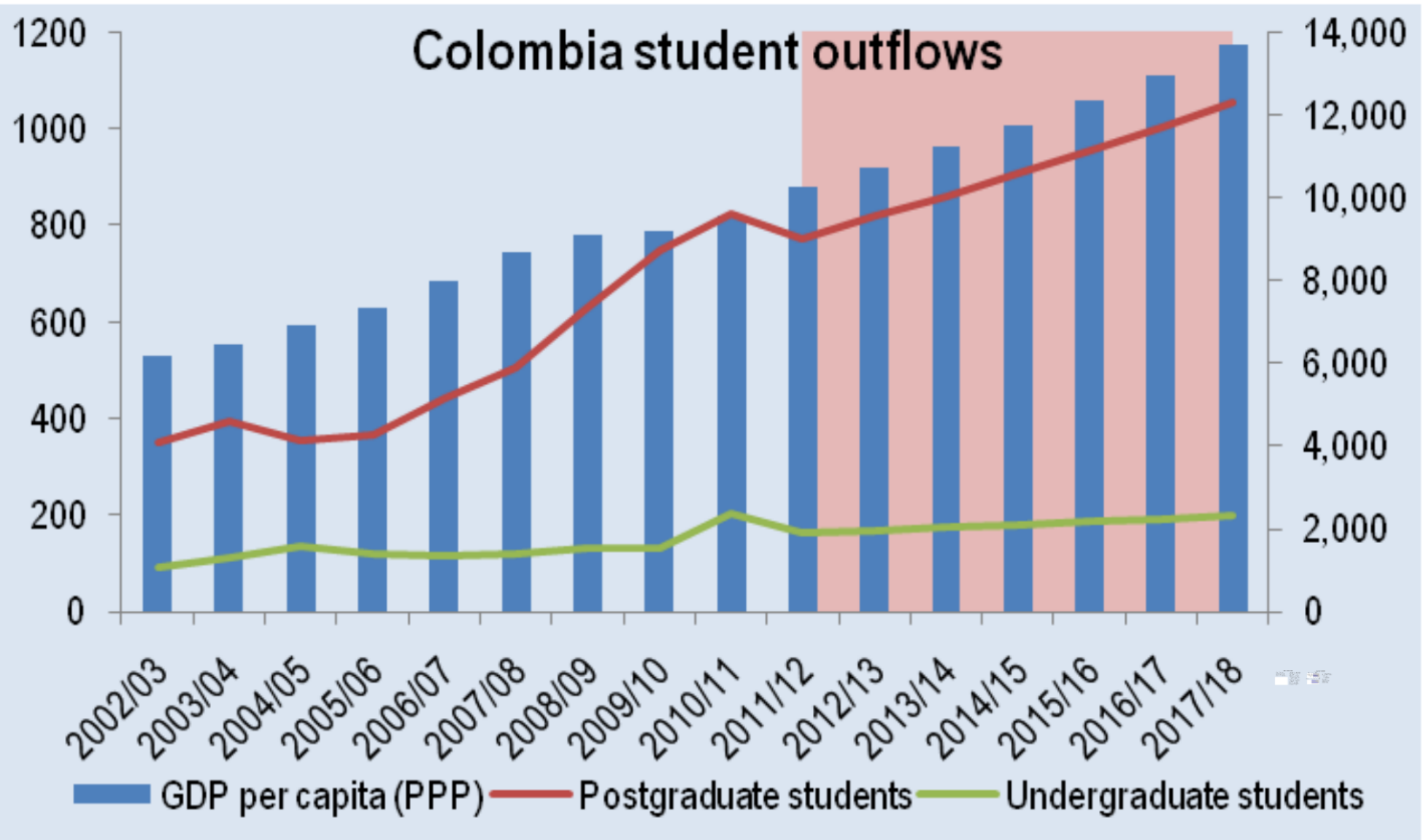
Colombia - country profile

- Population: 45.2 million
- 26% of population is 0 -14 years old
- Expenditure on education: 4.8% of GDP
- Spanish is official language
- Rise in English language teaching

Education indicators

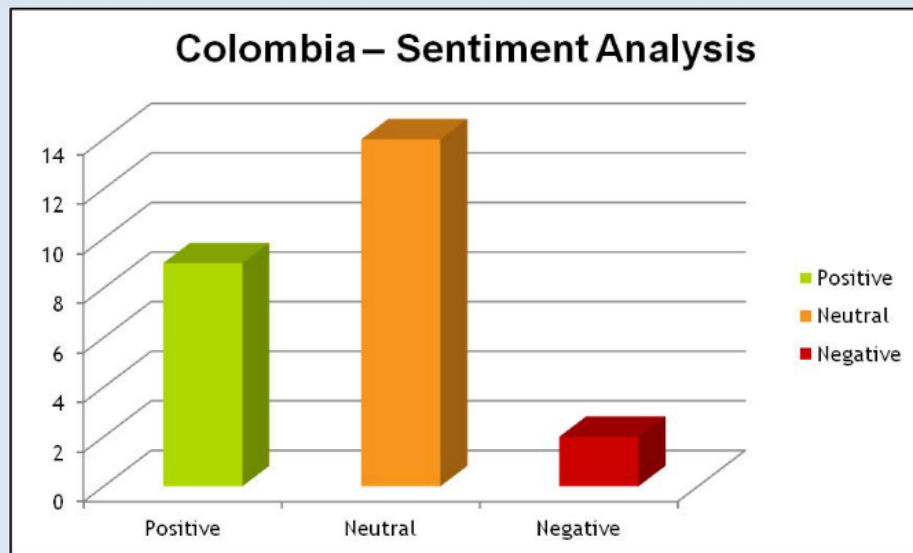
- 1030 students in 2010/11
- 20% Undergraduate, 80% Postgraduate
- 31% Postgraduate MBA students
- Undergraduate growth in Social studies, Law
- 70th sending market
- 29th most highly searched on EducationUK.org

Colombia student outflows



Online Sentiment Audit

- Positive - Neutral sentiment
- Rankings important in creating buzz
- Nottingham University featured #1 in three Colombian rankings

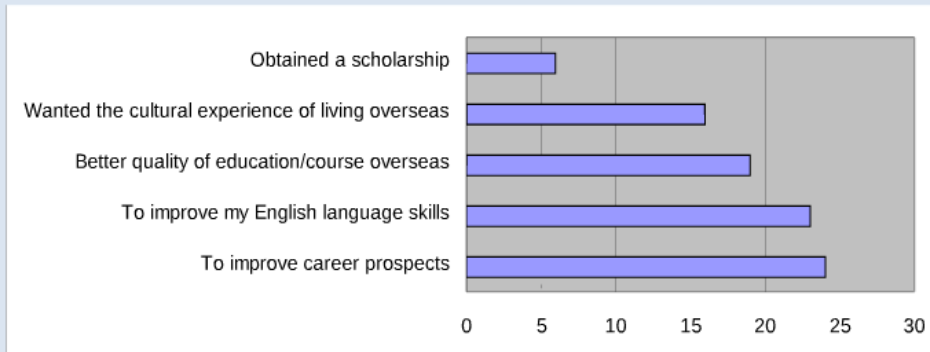


Topics that created the most buzz

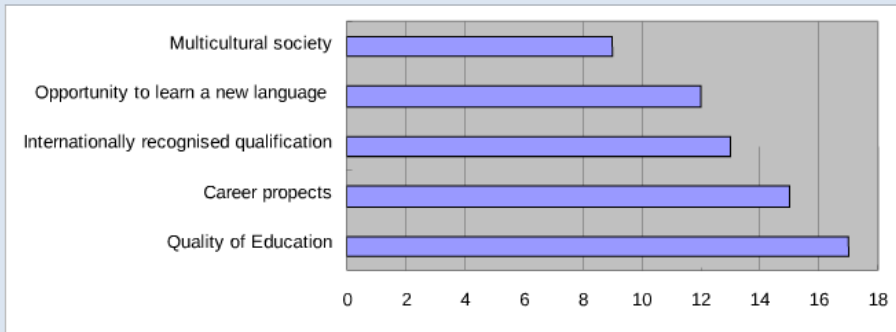
- Rankings are of high importance and bring the UK into the picture
- Institutions developing strategic partnership links with the UK
- Access to English language courses
- Scholarship opportunities
- Promotion of access to postgraduate programmes and progression from undergraduate level
- May, 2012 delegation, BC/ BIS 'Forging Partnerships in Higher Education with Colombia'

Colombia Student Insight

Why choose to study in the UK?



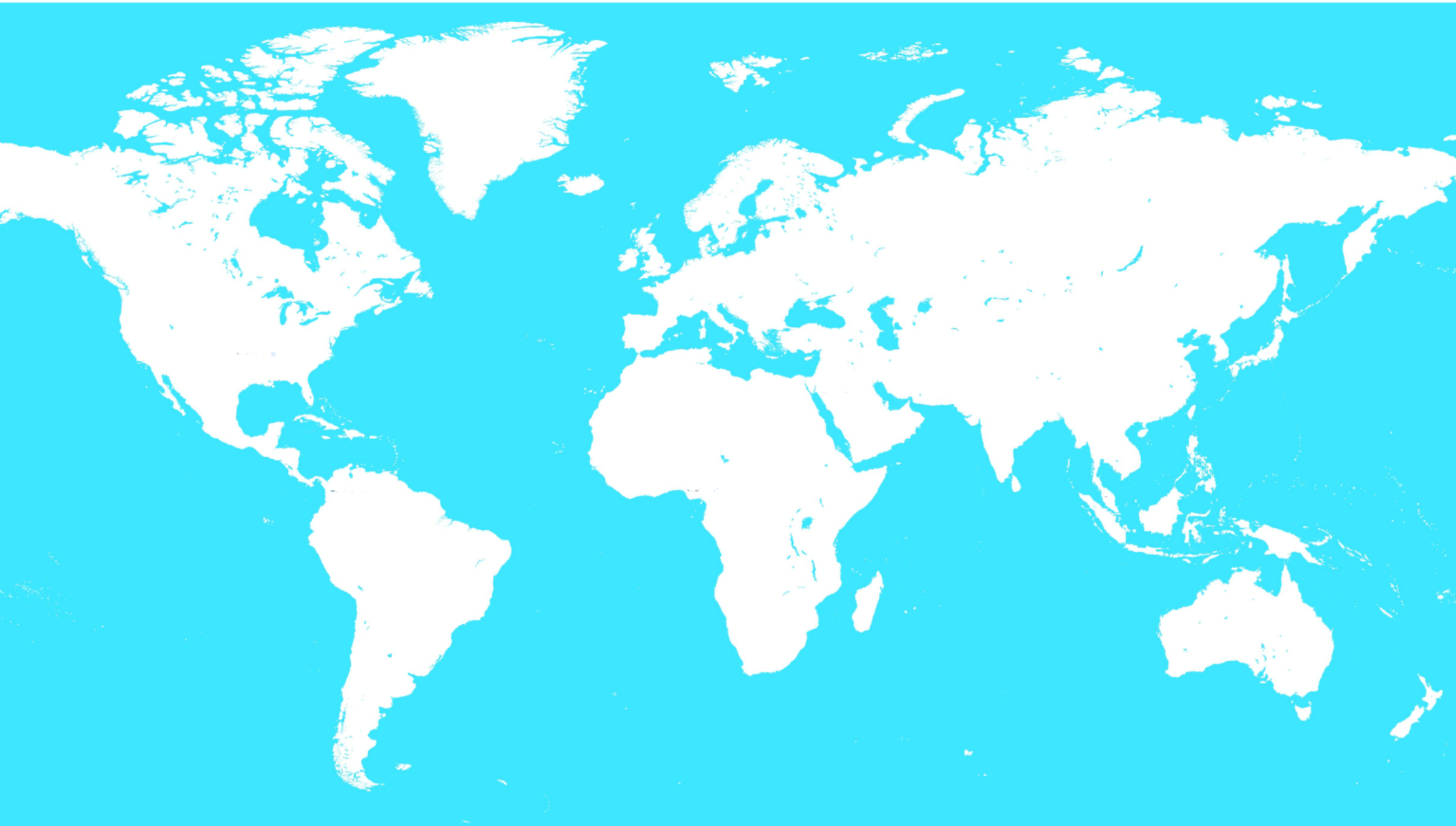
What are the most important factors about the UK?



- 58% said their Employer was the biggest influence in their decision
- 46% are employed
- 28% are studying at University
- Desired level of study: 30% English Language, 64% Higher Education

Colombia in the Spotlight

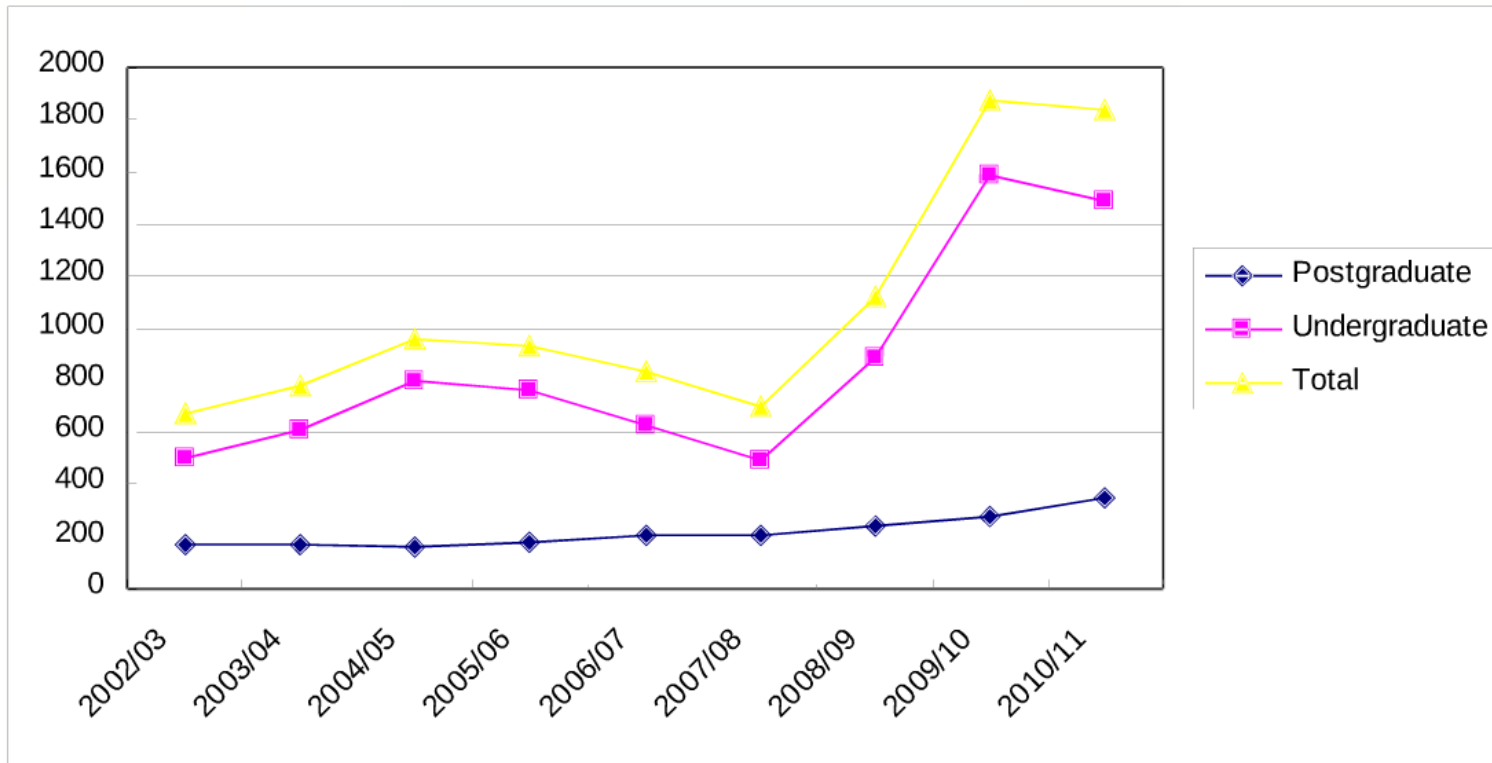
- Economic and demographic projections are good
- Strong beginning of Postgraduate market with growth potential
- Students are employed and wanting to further their careers
- Minimal knowledge of UK high education, but fruitful beginnings
- Rankings are of great importance
- Students see improvement of English language as personally advantageous in career pathways



The Philippines

Shift in demand - professional training to creative industries

Filipino students studying in the UK - UG, PG total



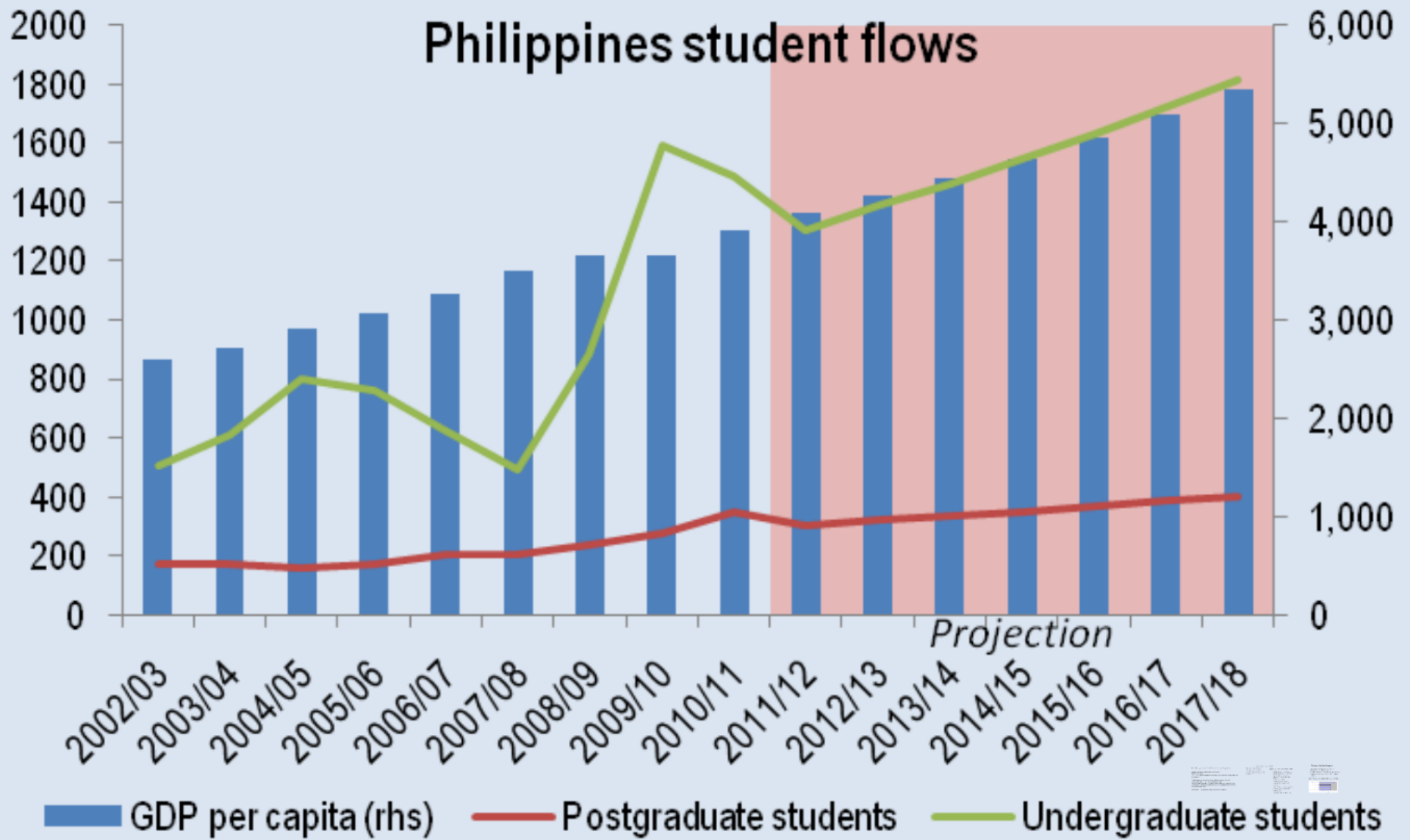
Filipino - country profile

- Population of 103,700,000
- 34% of the population is 0 -14 years old
- Median age is 23 years old
- Gross enrollment ratio: 34%
- 87 million Filipinos have mobile phones

Education Indicators

- 1835 total students in 2010-11
- 81% undergraduate, 19% postgraduate
- 86% of Filipino undergraduates studying Nursing
- Undergraduate growth: -7%
- Postgraduate growth: +24%

Philippines student flows



The Philippine phenomenon of nurse migration

- Philippines supplies 25% of all overseas nurses worldwide
- 90,000 nurses overseas
- UK – 13%, or 87,000 of the 660,000 nurses working in the NHS are from overseas, mainly from the Philippines

- Global shortage of nurses, serious concern for health services around the world
- Nurses in high demand - UK, US and in developing countries
- The World Health Organization, + 4 million to achieve Millennium Development Goals
- Nurse migration – global initiatives are being introduced to facilitate the free movement of nurses within Asia and beyond

- However 2010/11 undergraduate Nursing students in the UK fell by 9%

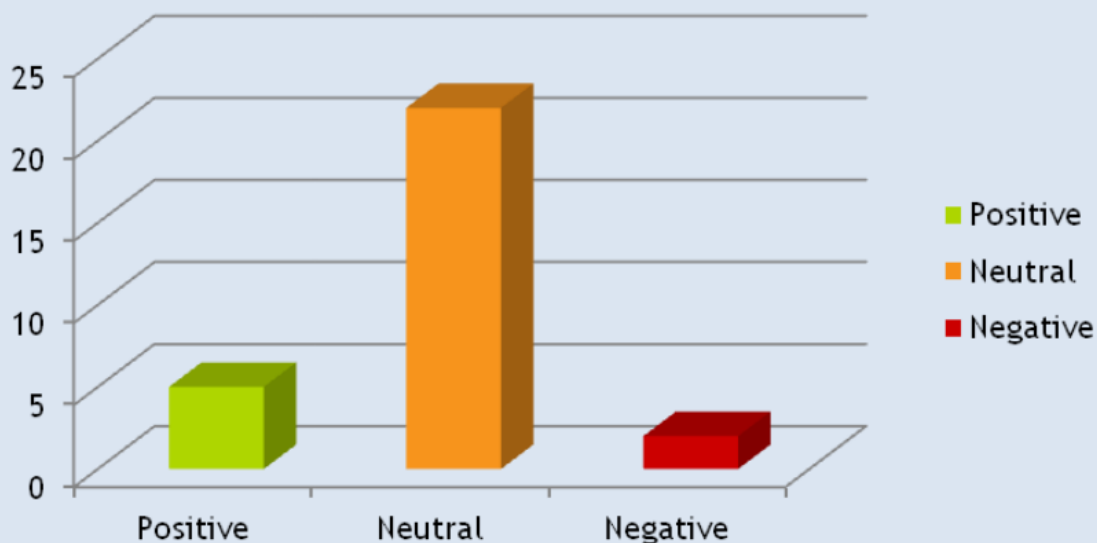
Online Sentiment Audit

- Medium amount of buzz
- Bilingual online discussion
- 41 sites actively mentioned UK education

Topics that created the most buzz

- Scholarships: 12 new Chevening scholarships to study in the UK
- Large subsequent discussion
- Most critique associated with UKBA fee increases
- Rankings are seen as very important and create much discussion
- 50% increase in discussion about creative industries associated with the UK
- Access to Postgraduate courses

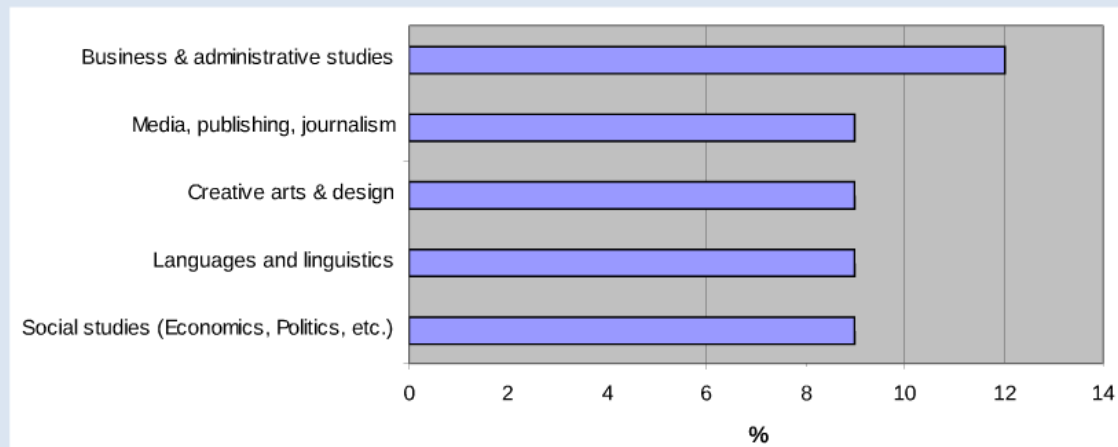
Philippines – Sentiment Analysis



Filipino Student Insight

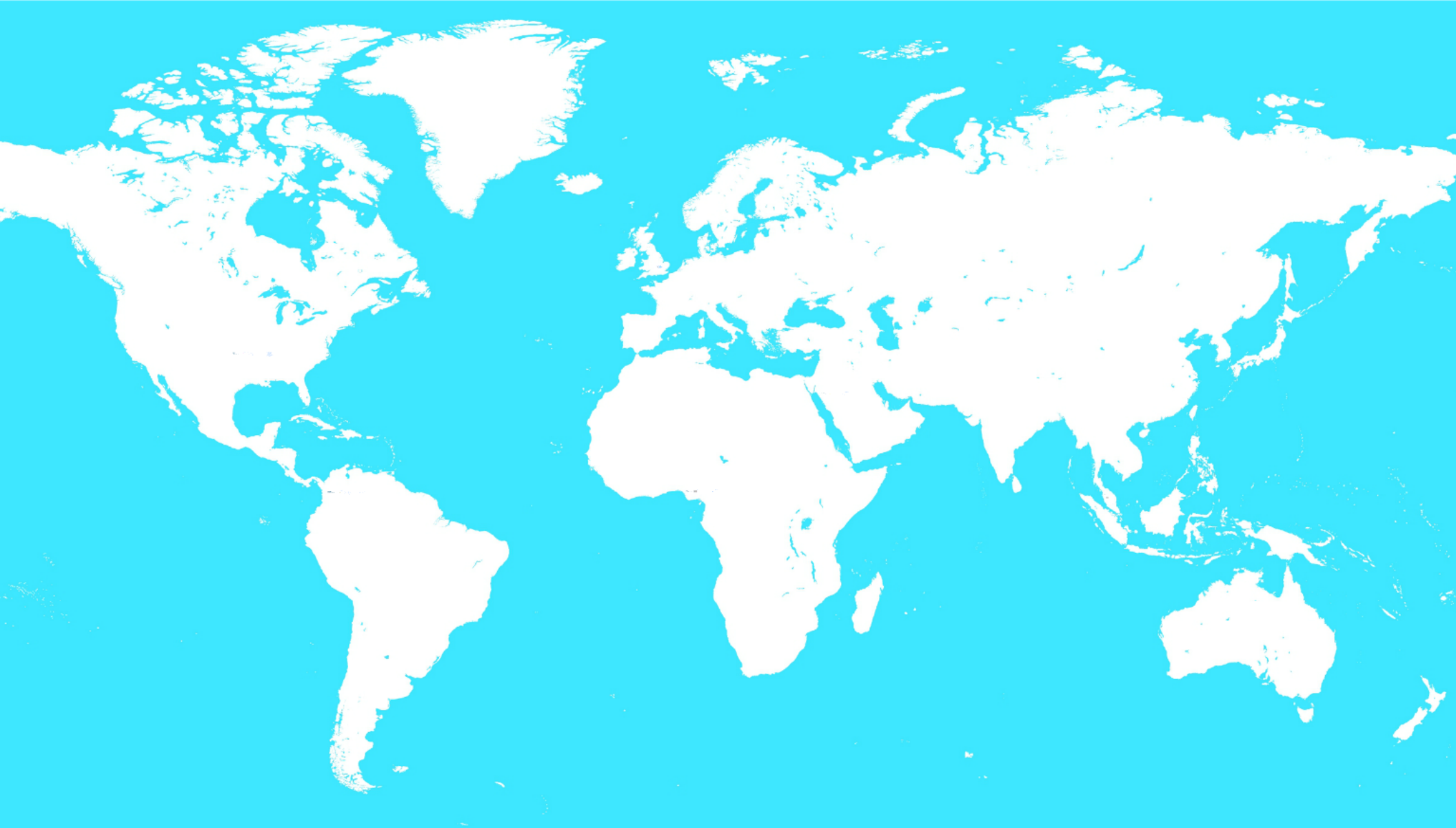
- 53% of respondents want to study in the UK
- 60% have friends or relatives in the UK
- Australia, Canada, and US are other popular destinations
- Greatest influence on their decision: 46% indicate their Employer

What subject area would you like to study?



Philippines in the Spotlight

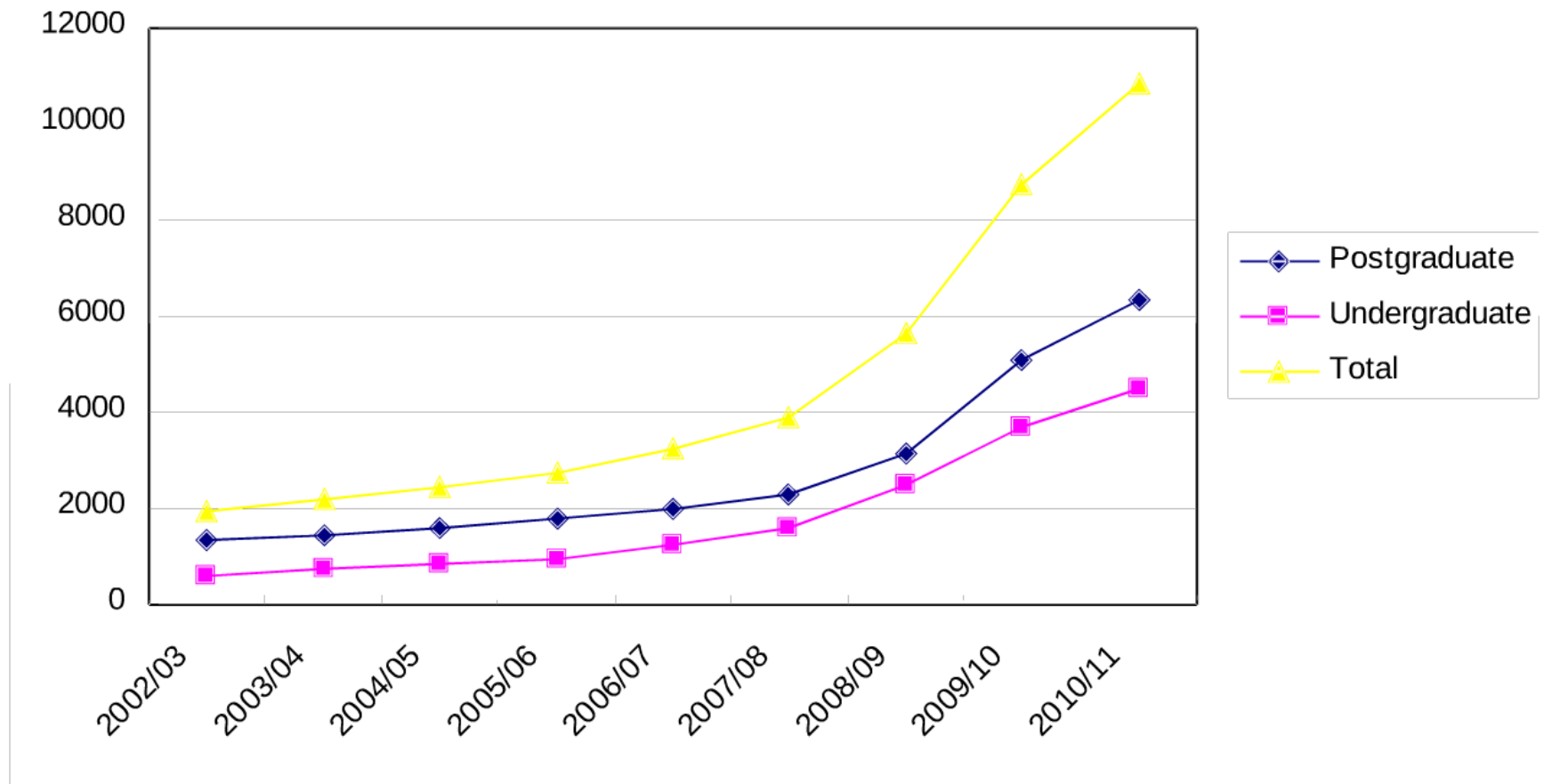
- UK has a good reputation, overall perception positive, with potential to grow
- Sentiment audit and Insight correlation show scholarships and visas as 'push' and 'pull' factors
- Decline in Undergraduate Nursing students direct response to immigration controls and NHS demand
- Predictive strength much higher for Postgraduate, despite large Undergraduate focus
- Sentiment audit and Insight correlation show growth in interest in the creative industries – media, creative arts, music
- But, will economic challenges restrain the market?



Saudi Arabia

**Prestige and multiculturalism give UK
competitive edge**

Saudi students studying in the UK - UG, PG, total



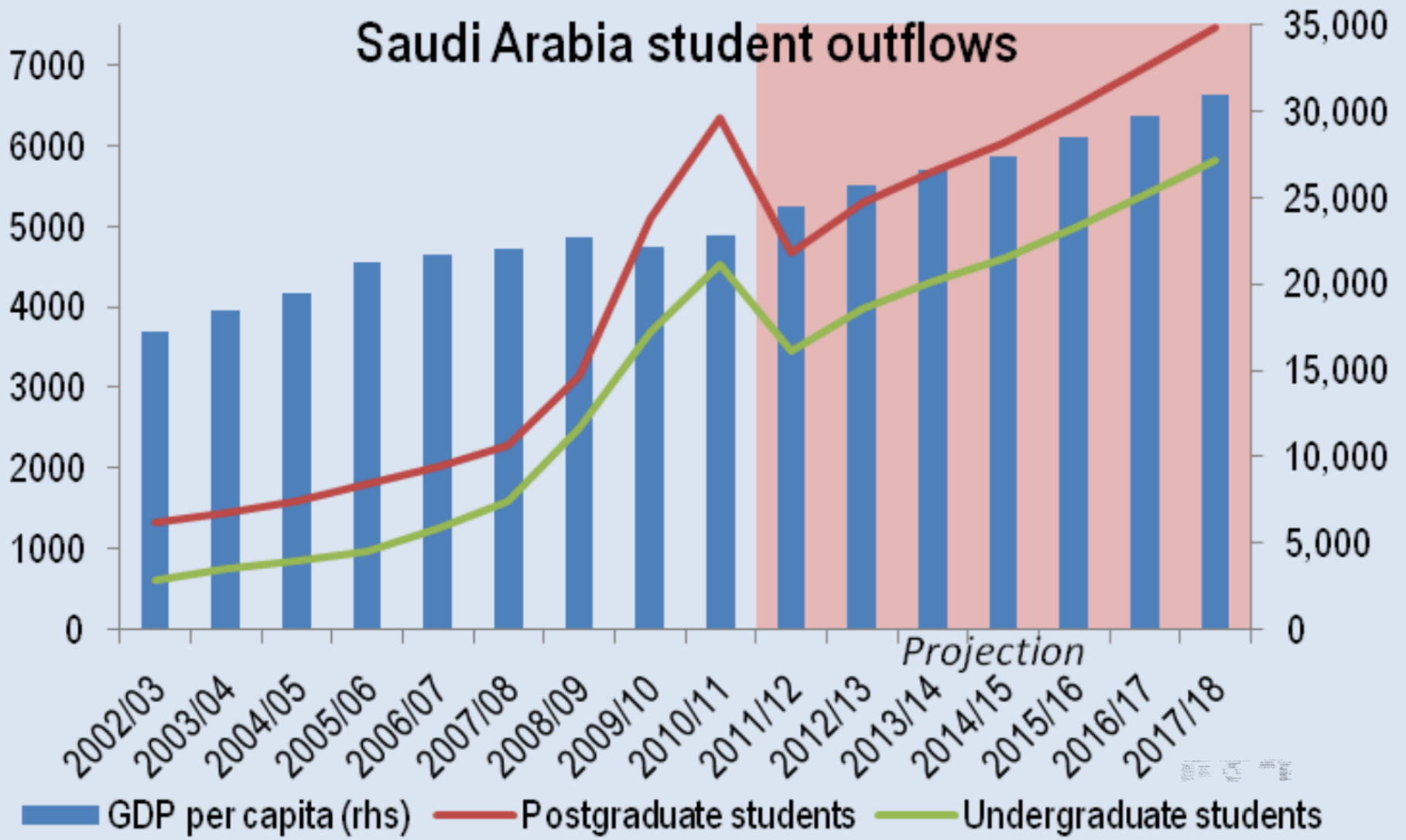
Saudi - country profile

- Population: 26.5 million
- 30% of the population aged 0 – 14 years
- Oil based economy - petroleum 45% of GDP
- Gross enrollment ratio: 37%
- 52 Universities; 24 Government , 8 private, 20 private colleges
- Gender separation
- King Abdullah University of Science and Technology, 2009

Education indicators

- 10,850 students in 2010/11
- Undergraduate 42%
- Postgraduate 58%
- Postgraduate growth areas: Human resource management, Law, Media studies
- Undergraduate growth areas: Civil engineering, Mechanical engineering

Saudi Arabia student outflows



The King Abdullah Scholarship Programme

- Initiated in 2005 - extended until 2020
- 80 million GBP spent from 2006 - 2010
- Sponsors highly qualified Saudi students to undertake studies abroad
- All levels - BA, MA, PhD, fellowship, ESL, foundation
- Candidates must meet the requirements set by the Ministry of Higher Education
- Accepted candidates can choose from 22 countries
- Medical fields, Sciences, Engineering, Accounting, Finance, Insurance, Marketing
- Most popular countries: USA, UK, Canada, Australia, Egypt, South Africa and Malaysia

The purpose of the KASP

- Economic growth
- Speculation into knowledge economy
- Broaden 'global world view'
- Expand Saudi tertiary education
- Diversify labour force within the country
- Reduce national dependency on oil industry

Saudi students in the UK: KASP vs. self-funded students

- 51% overseas government funding
- 23% no financial backing
- 12% students employer
- 14% other funding sources

KASP students

- Male: 74%
- Female: 26%
- Postgraduate 63%
- Undergraduate 37%

Self funded students

- Male: 73%
- Female: 27%
- Postgraduate 59%
- Undergraduate 41%

Subject demand:

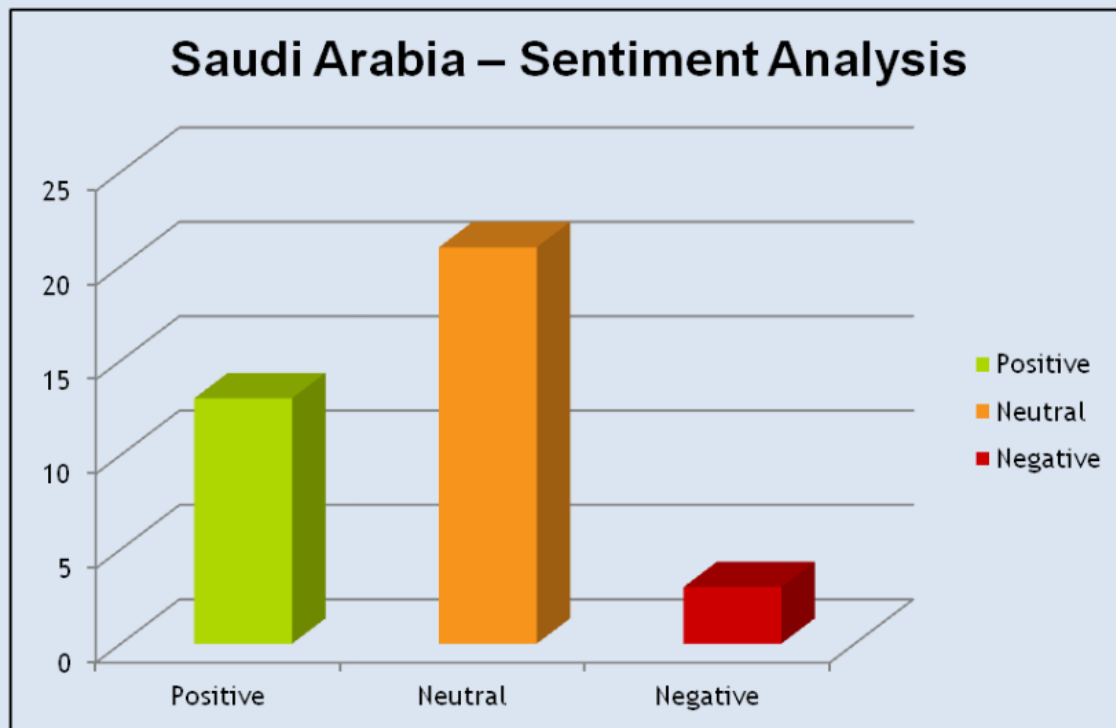
- Business and administrative studies
- Computer science
- Engineering and technology

Saudi Online Sentiment Audit

- Positive - Neutral sentiment
- Rankings of high importance
- 60% increase in discussion about the UK within the past six months

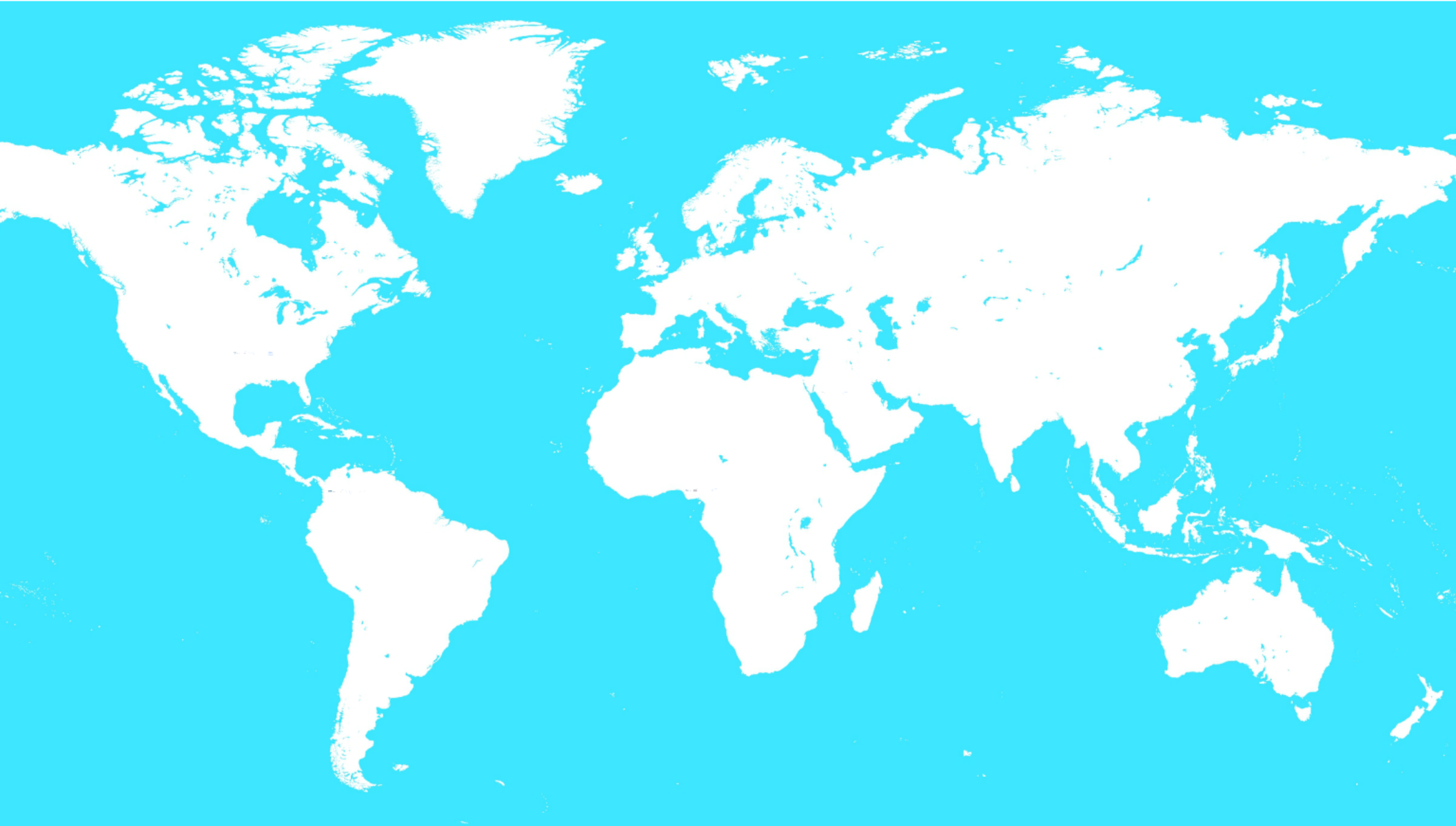
Topics creating most buzz

- Saudi students within the UK
- UK Universities Fair in London
- Sixth Form college opportunities in UK
- SOAS – launch of The Center for Palestine Studies
- Islamic universities teaching online English
- University rankings
- Visa policy, reforms
- Student safety, with a view of female students



Saudi Arabia in the Spotlight

- As a high income country growth in enrollments is limited
- Unique scholarship environment shapes 50% of demand in line with market determined priorities
- KASP vs. self-funded students: following same trends, with minimal variation
- Trends across levels of study also determined by market forces
- Perception of the UK is based on non-cost factors
- UK has strong reputation based on quality and brand
- Safety within the learning environment
- Multicultural society



Analysis of six distinct markets

Teaching excellence

Essential skills

Iconic culture

English language

Creative industries

Multicultural society

Analysis of six distinct markets

**Teaching excellence
Essential skills
Iconic culture
English language
Creative industries
Multicultural society**

= UK Unique Value Proposition

Spotlight on the UK