

SERVICES FOR  
INTERNATIONAL  
EDUCATION  
MARKETING

CONFERENCE 2015

---

The return of Japan? - Evaluating government policies  
and market potential for international education

Jazreel Goh, British Council

Matt Durnin, British Council

Ayako Towatari, British Council

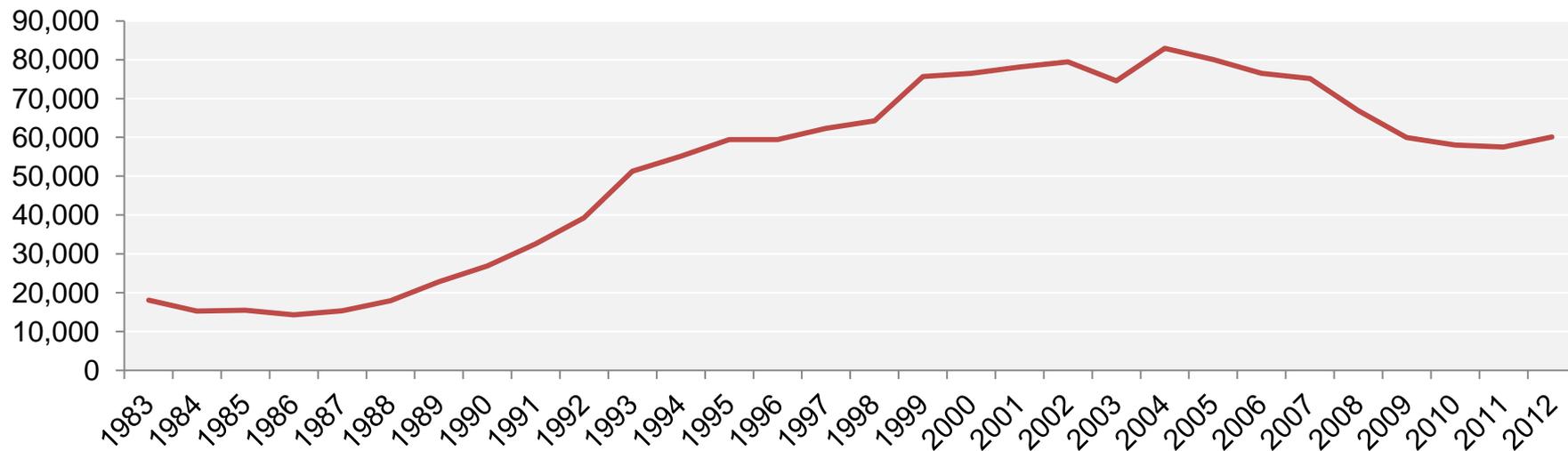
Andrew Lane, Northumbria University



- I. The rise and fall of foreign study
- II. The population problem
- III. Mobility trends and challenges

# I. The rise and fall of outbound study

## Number of Japanese studying overseas

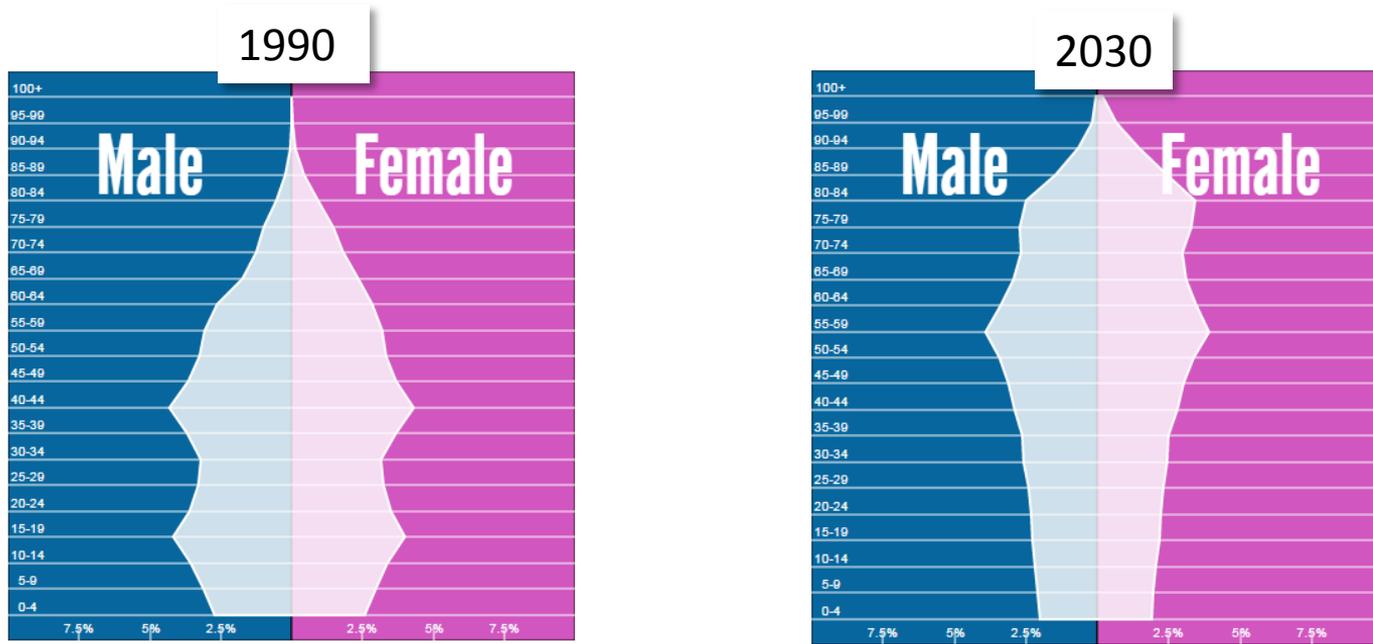


Source: MEXT

- I. The rise and fall of foreign study
- II. The population problem**
- III. Mobility trends and challenges

## II. The population problem

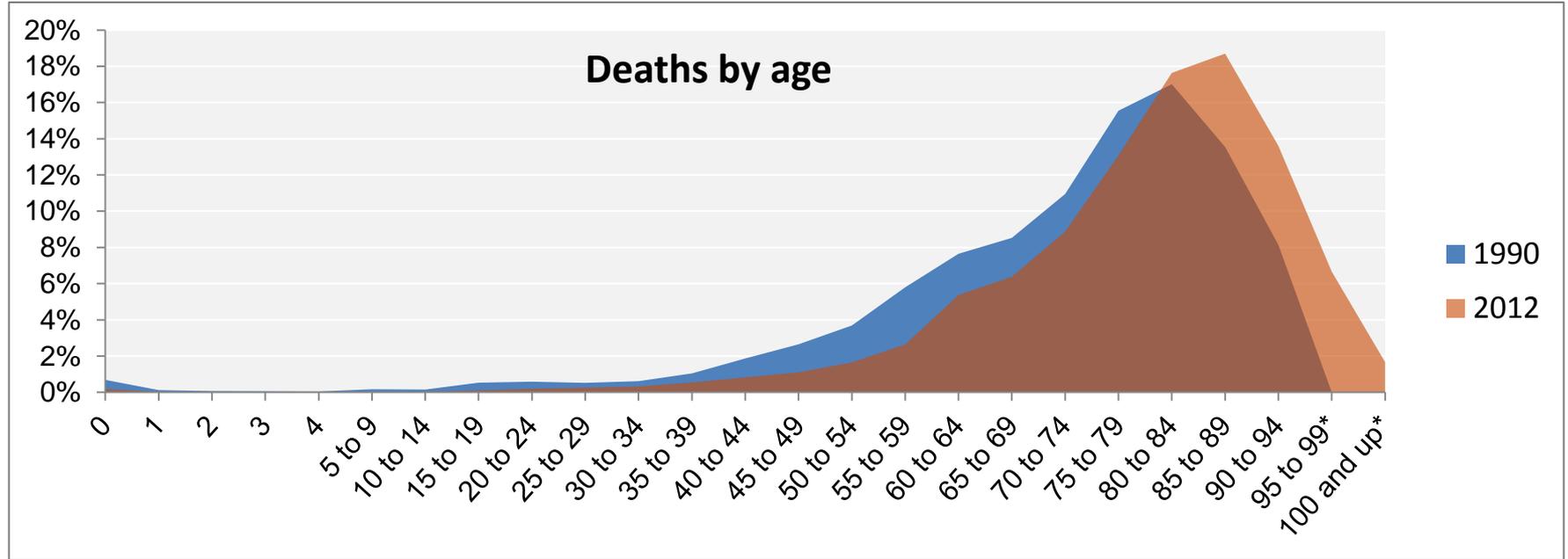
*Japan has the world's most top-heavy population pyramid*



Source: [www.populationpyramid.net](http://www.populationpyramid.net)

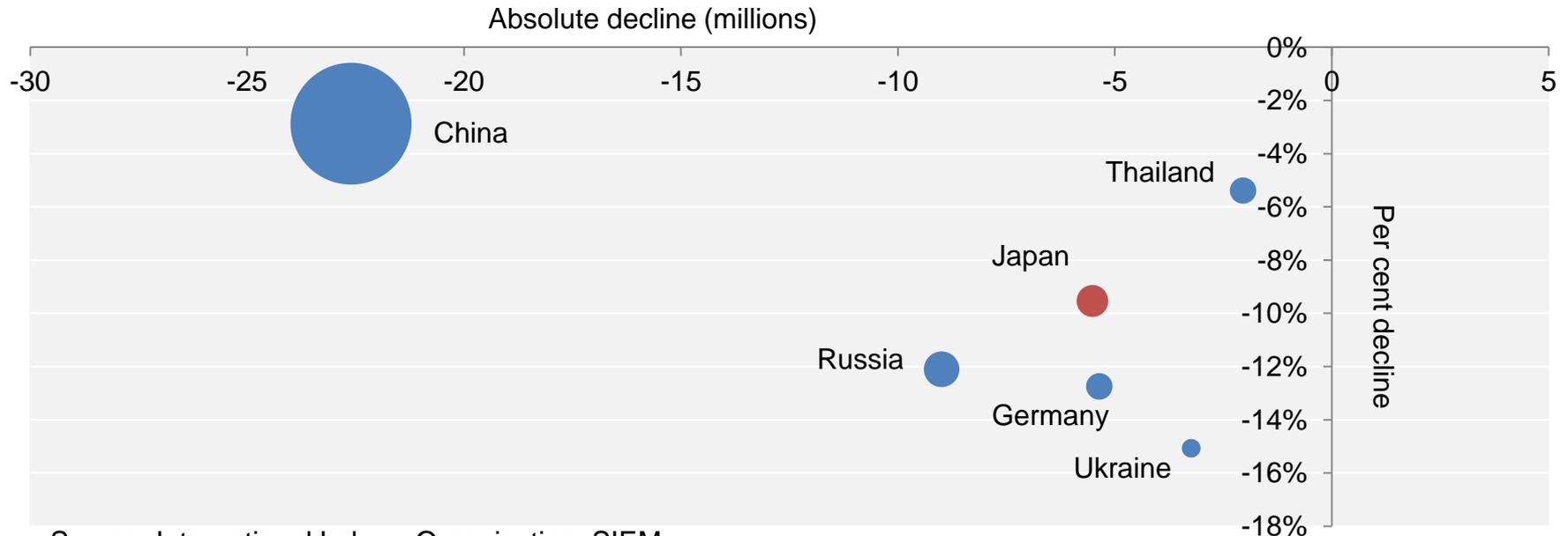
## II. The population problem

*Huge gains in life expectancy... at the expense of the economy*



## II. The population problem

*Japan will experience one of the largest labour force declines in the 2014-2030 period*

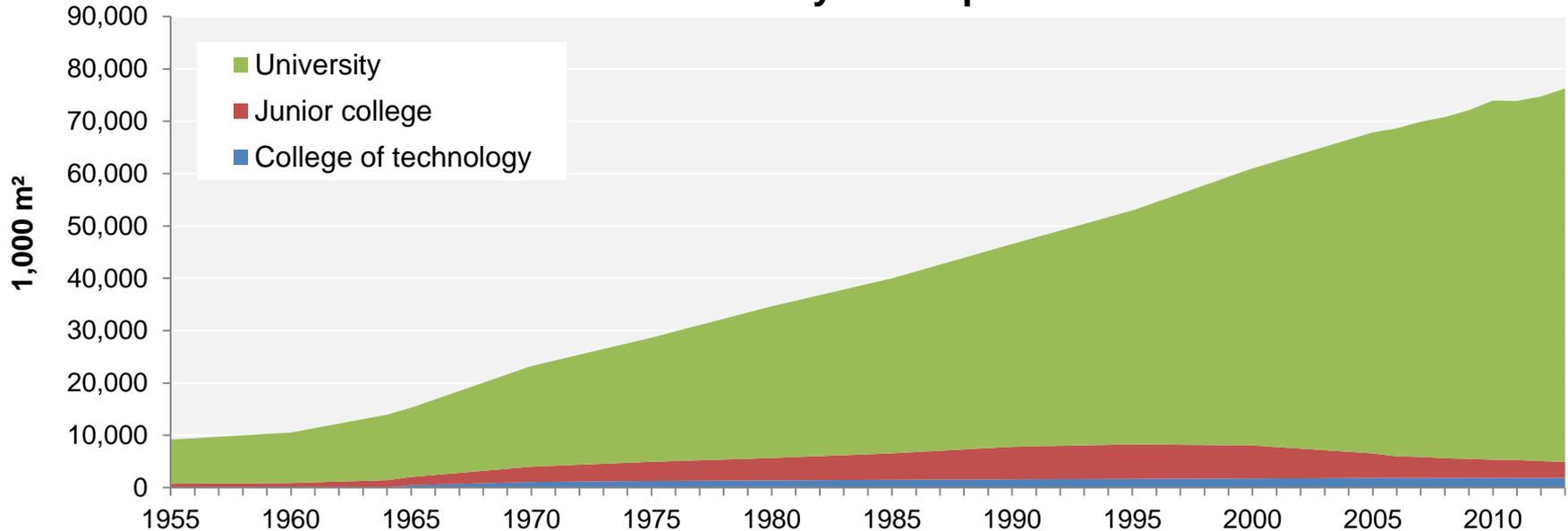


Source: International Labour Organisation, SIEM

## II. The population problem

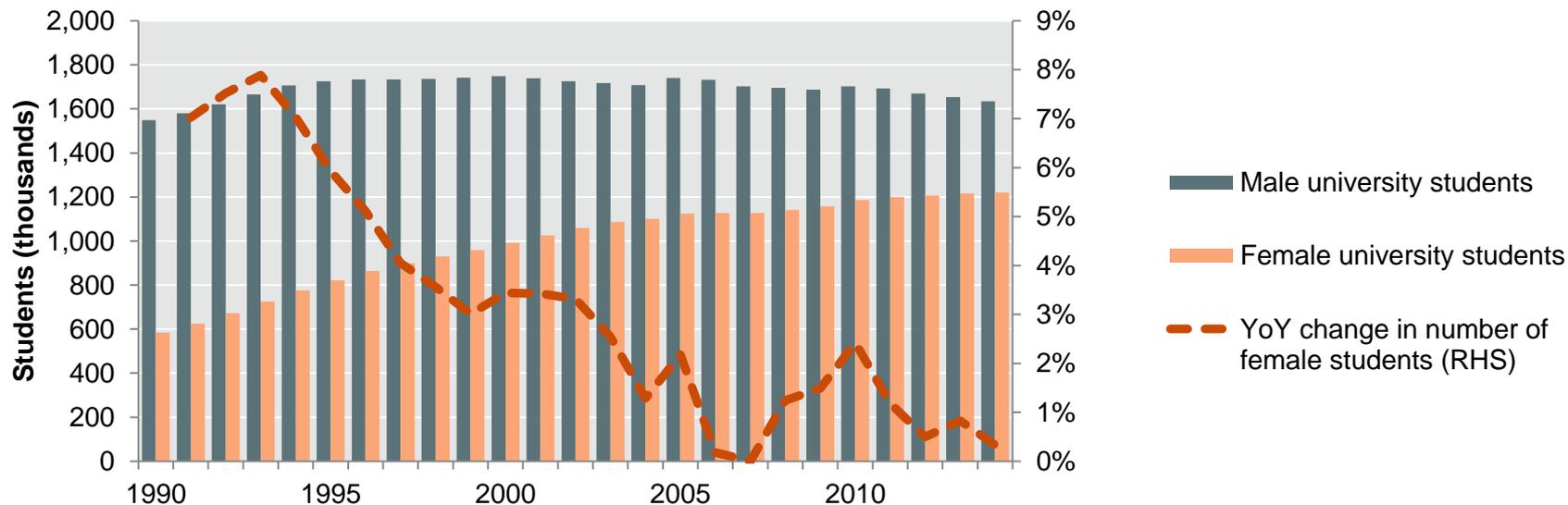
*Contrary to popular belief, the shrinking youth population has yet pinch university enrolments*

**Institutions by floor space**



## II. The population problem

*An influx of female students has helped stabilise university enrolments, but growth now slowing*

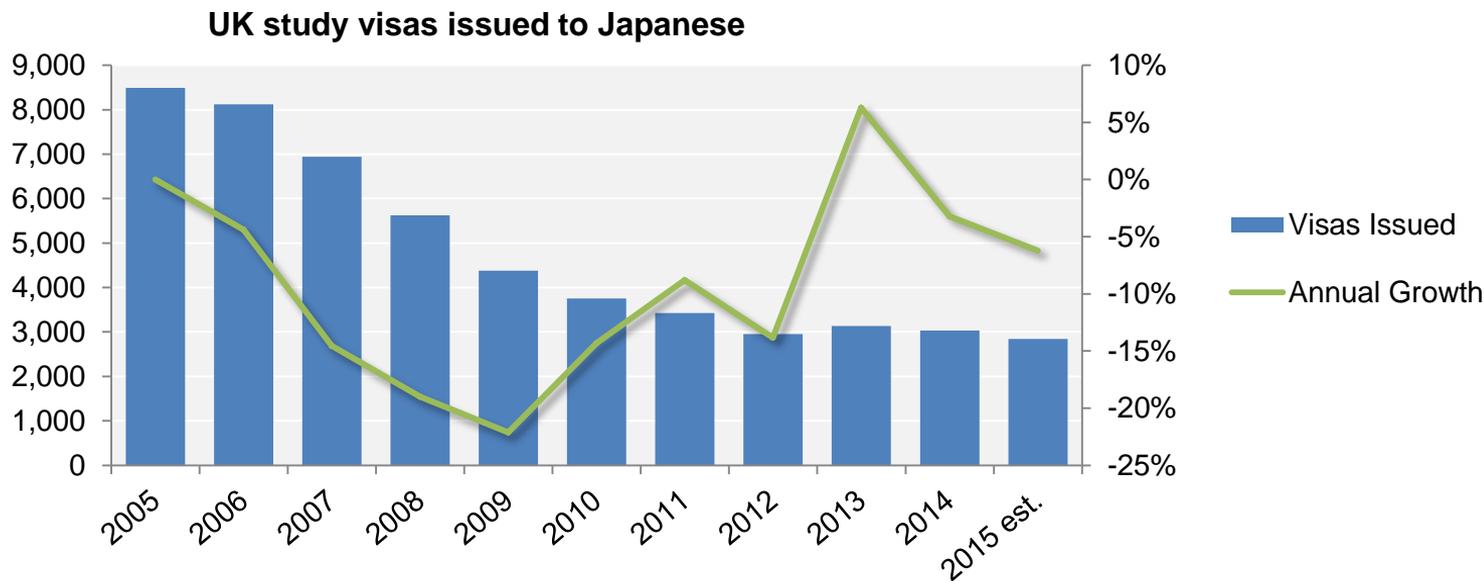


Source: MEXT School Basic Survey (2015)

- I. The rise and fall of foreign study
- II. The population problem
- III. **Mobility trends and challenges**

### III. Mobility trends and challenges

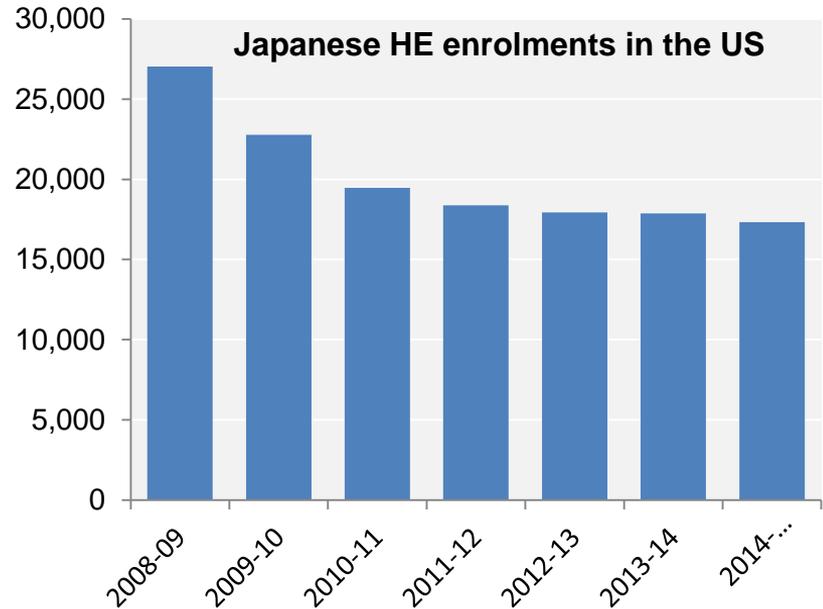
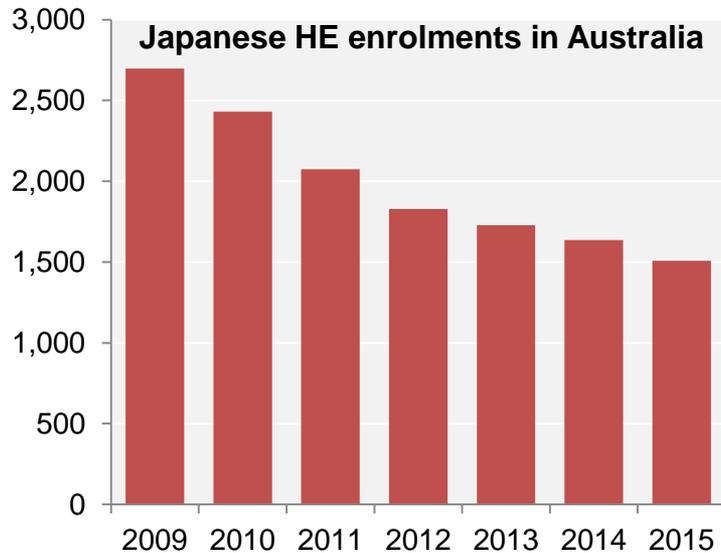
*Japanese student mobility to the UK has faltered in recent years...*



Source: UKVI

### III. Mobility trends and challenges

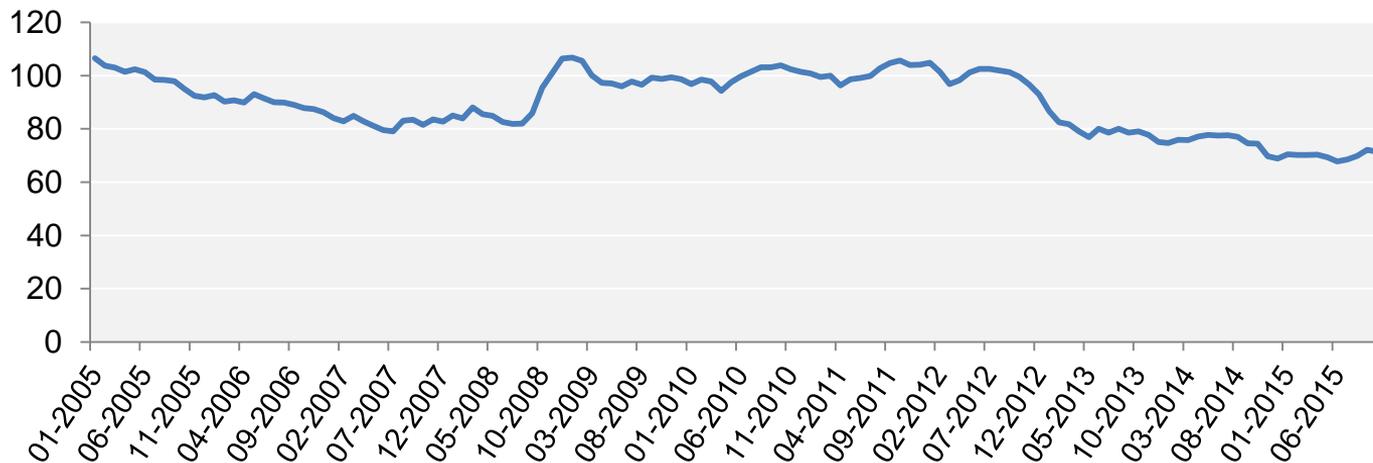
*...but competitors aren't doing any better*



### III. Mobility trends and challenges

*A weaker yen may be dampening demand for outbound study*

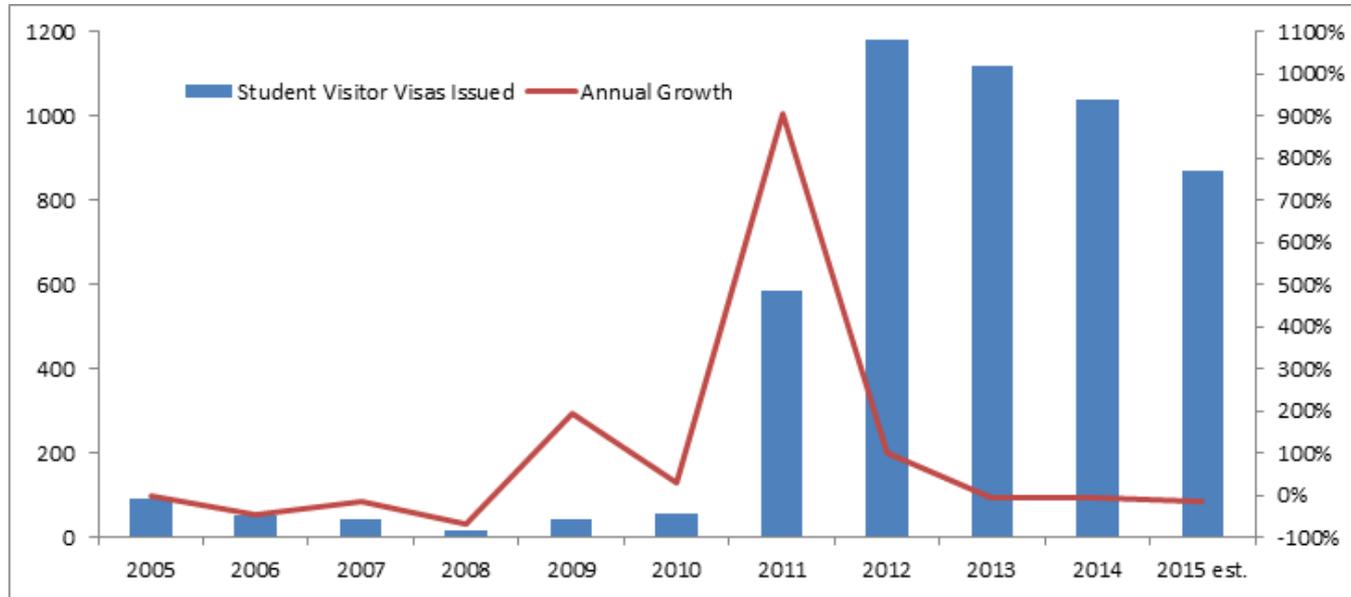
**Japanese yen: Real effective exchange rates**



Source: Bank for International Settlements

### III. Mobility and trends and challenges

*But could Japanese scholarship incentives also be part of the problem*





SERVICES FOR  
INTERNATIONAL  
EDUCATION  
MARKETING

CONFERENCE 2015

---

Policy changes and implications for UK HEIs  
Ayako Towatari  
Projects Manager (Education), British Council Japan

#siem2015

[www.britishcouncil.org/siem](http://www.britishcouncil.org/siem)

Sponsored by



D.J.G. EXHIBITION FREIGHT SERVICES LIMITED

GeoXoLabs



An aerial photograph of a city skyline at sunrise or sunset. The sun is low on the horizon, creating a bright glow and casting long shadows. The sky is filled with soft, white clouds. The city below is densely packed with buildings, with several prominent skyscrapers. The overall color palette is warm, dominated by oranges, yellows, and greys.

# Expanding Higher Education participation

# New Higher Education Institutions for Vocational Training

## Welfare

Elderly Care (310,000)

## IT/Information services

(370,000)

## Content creation

Web contents  
production / Animation  
(20,000)

## Hospitality

Tourism/hotel  
industries  
(220,000)

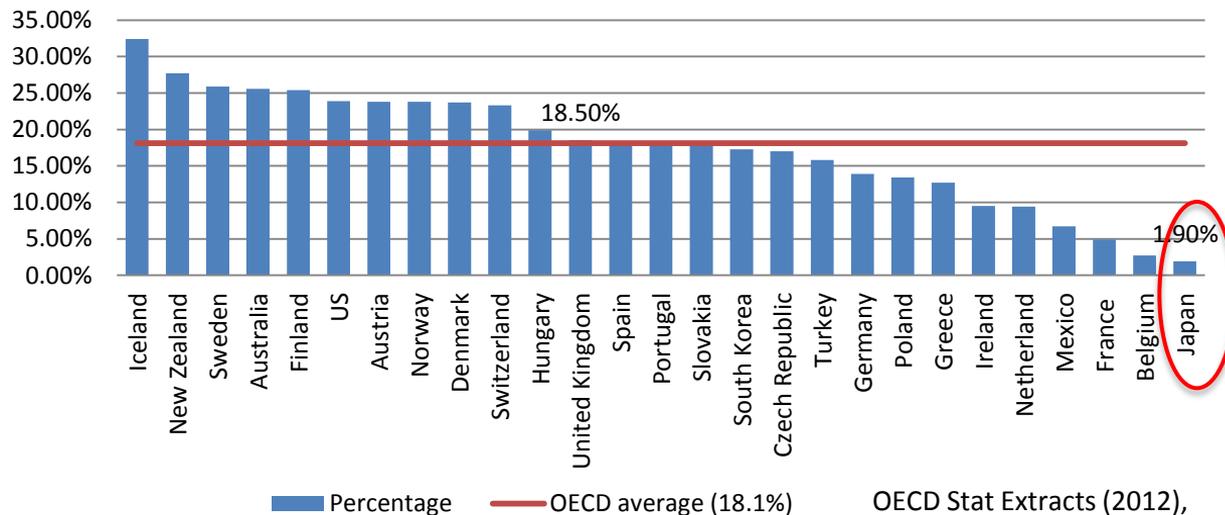
## Business administrations

Sales/Finance/HR  
(400,000)

# Promoting continuing education for mature students

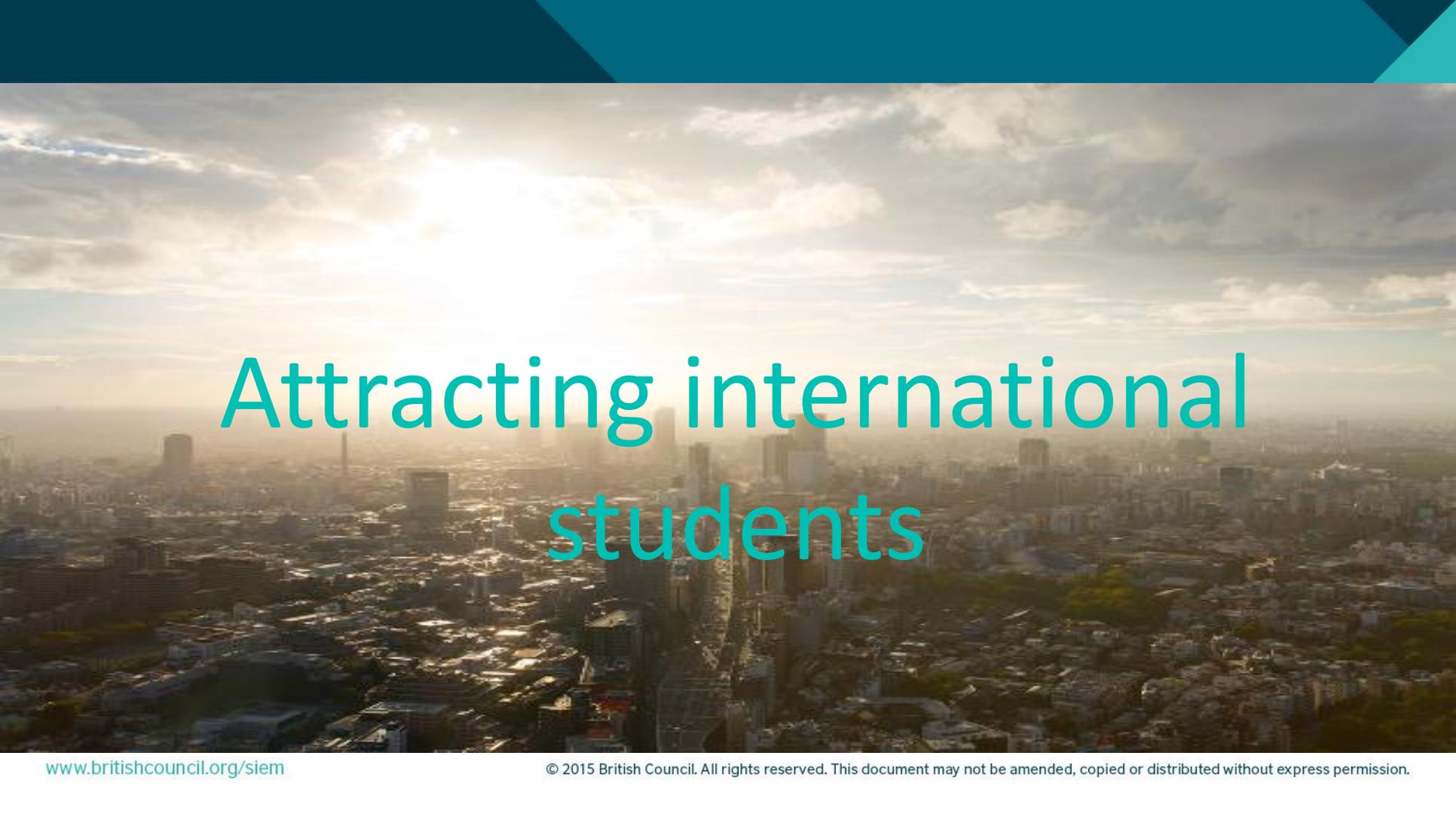
- Proportion of over 25 year olds amongst university entrants is extremely low in Japan at 1.9%

**University entrants**  
**- proportion of over 25 year olds**



# Meeting demand for professional graduate schools



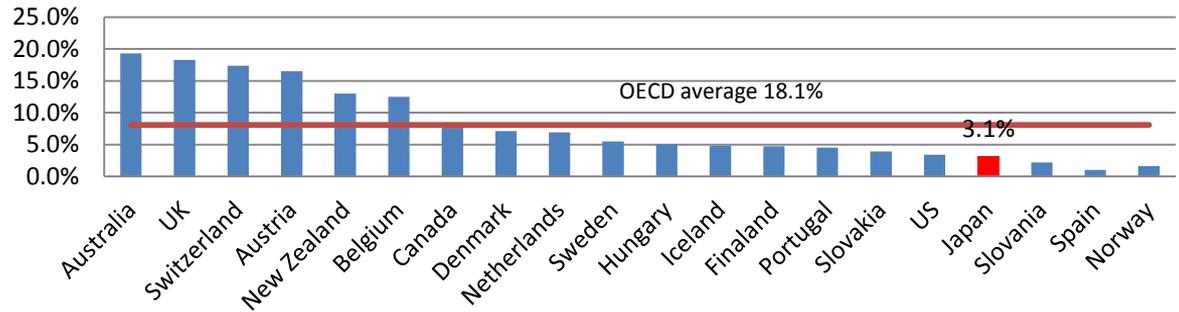
An aerial photograph of a city skyline at sunrise or sunset. The sun is low on the horizon, creating a bright glow and casting long shadows. The city buildings are silhouetted against the bright sky. The text 'Attracting international students' is overlaid in a large, teal, sans-serif font.

# Attracting international students

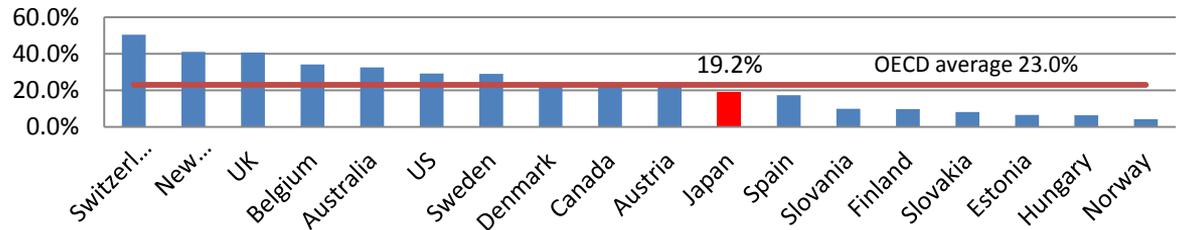
# Proportion of international students in universities

- Percentage of international students in Japanese universities is lower than OECD average at 3.1% at undergraduate and master's level and 19.2% at postgraduate level.
- Government aims to double the inbound mobility

Percentage of int'l students at Bachelor/Master's level (2011)



Percentage of Int'l students at doctoral level (2011)



# New grant allocation system for 86 national universities

16

World top-ranking teaching and research universities

15

World class teaching and research universities which excel in specific subject areas

55

Universities which contribute to local revitalisation through world class research and education

Evaluation criteria will include:

- Citation
- International student mobility
- Number of international academic staff
- Level of globalisation

# Recommendations for UK Higher Education Institutions

Participation in development of international curricula / English language degree programmes

Increased research partnerships, joint supervision and student/faculty exchange

Development of specialist, non-academic staff to support international exchanges and research development

An aerial photograph of a city skyline at sunrise or sunset. The sun is low on the horizon, creating a bright glow and casting long shadows. The sky is filled with soft, white clouds. The city below is densely packed with buildings, with several skyscrapers standing out. The overall color palette is warm, dominated by oranges, yellows, and greys. A teal header is at the top, and a teal footer is at the bottom.

# Increasing support for short-term study abroad

# Trends of Japanese Government Scholarships

Support for short-term study abroad

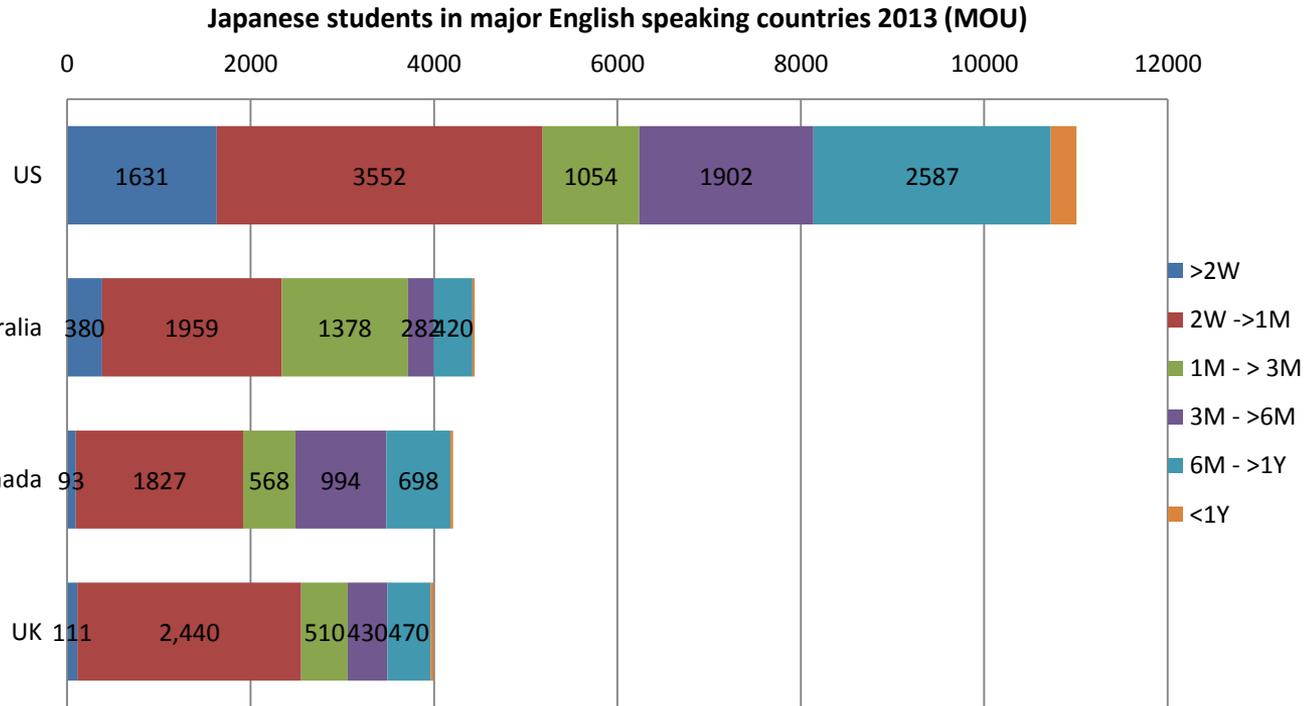


- Length: > 1 year
- Applicable for exchange students from universities, junior colleges, National Institutes of Technology and technical colleges
- Approx. 543GBP per month



# Comparative statistics

- Relatively small share of the UK for study abroad through MOU, that means more partnerships can be developed
- Especially, room for improvement for longer-term programmes (1 semester to a year)
- Size the opportunities opened up through enhanced financial support to build up relations that may lead to longer-term mobility



Source: Japan Student Services Organization (JASSO)

# Recommendations for UK Higher Education Institutions

Focus on developing deep institutional partnerships

Regional public and private universities particularly in need of partners

Be prepared to offer programmes suited to wide ranges of needs including staff development

# Questions?

*British Council's **Services for International Education Marketing** (SIEM) team helps UK institutions refine their internationalisation strategies to succeed in East Asia and around the globe. Please get in touch if you would like to learn more.*

**jazreel.goh@britishcouncil.org.cn**

**ayako.towatari@britishcouncil.org.cn**

**matt.durnin@britishcouncil.org.cn**