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UK education vs the world: how to compete with global competition

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EDUCATION IS GREAT BRITAIN

UK v The World: How To Compete with Global Competition

The competition: USA, Canada, Australia and NZD (and EU)

Perspectives from India, China and Africa.

Richard Everitt – India
Jamie Hastings – Africa
Jazreel Goh – China

14.45   Welcome Introductions and a view from India

15.00   What we see in Africa

15.15   The landscape in China

15.30   Q&A

15.45   Summary and close

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Overview of Competitor Strategies

USA

- Approach is to learn from the best in the world
- Benchmark in areas of teaching, learning and technology
- Strategic partnerships with Brazil, China, India and Indonesia
- 100,000 strong initiative to increase Chinese students
- Key initiatives **Competing on World Stage, Partnerships, Diplomacy & Benchmarking**

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Student Numbers in USA – (2013/14, 886,422 total)

Rank	Place of Origin	Number of Students	Percent of Total
1	China	274,439	31.0%
2	India	102,673	11.6%
3	South Korea	68,047	7.7%
4	Saudi Arabia	53,919	6.1%
5	Canada	28,304	3.2%
6	Taiwan	21,266	2.4%
7	Japan	19,334	2.2%
8	Vietnam	16,579	1.9%
9	Mexico	14,779	1.7%
10	Turkey	13,286	1.5%
	All Others	273,426	30.9%

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Degree Level, Top 10 Places of Origin for the United States, 2013-2014

Places of Origin	Top 10 Places of Origin	Total Number of International Students	Undergraduate International Students	Graduate International Students	Non-degree seeking International Students	Optional Practical Training
#1	China	274,439	110,550	115,727	14,761	33,401
#2	India	102,673	12,677	61,058	1,242	27,696
#3	South Korea	68,047	36,992	18,894	5,522	6,639
#4	Saudi Arabia	53,919	26,865	11,108	15,172	774
#5	Canada	28,304	13,916	11,207	613	2,568
#6	Taiwan	21,266	5,886	10,177	1,663	3,540
#7	Japan	19,334	9,155	3,562	5,159	1,458
#8	Vietnam	16,579	11,886	2,562	881	1,250
#9	Mexico	14,779	8,311	4,182	1,080	1,206
#10	Brazil	13,286	5,097	3,118	4,222	849
All Others		273,426	129,389	88,259	29,162	26,616
Total of All Places of Origin		886,052	370,724	329,854	79,477	105,997

Source: Institute of International Education. (2014). Open Doors Report on International Educational Exchange

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USA Cont'nd

Source:

Succeeding Globally Through International Education and Engagement, US Dpt of Education International Strategy 2012-16

Source:

Institute of International Education, *Open Doors Report*

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Canada

- Massive focus to address skilled labour shortages and jobs they can fill during & after studies
- Focus on priority markets Brazil, China, India, Mexico, MENA and Vietnam
- Maintain current markets France, UK, Germany, Japan, Korea and US
- Strategy to ensure flexibility for mature & developing markets
- Target of 450,000 international students to Canada by 2022

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Student Numbers in Canada – country breakdown

Source country	# of students (2013)	% of total IS population
China	95,160	32.42%
India	31,665	10.79%
South Korea	18,295	6.23%
Saudi Arabia	14,235	4.85%
France	13,090	4.46%
United States	12,065	4.11%
Japan	6,780	2.31%
Nigeria	6,080	2.07%
Mexico	5,370	1.83%
Iran	4,335	1.48%
Vietnam	3,990	1.36%
Hong Kong	3,835	1.31%
Brazil	3,415	1.16%
Pakistan	3,125	1.06%
Russia	2,970	1.01%
United Kingdom	2,775	0.95%
Taiwan	2,635	0.90%
Germany	2,605	0.89%

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Student Numbers in Canada – Region breakdown

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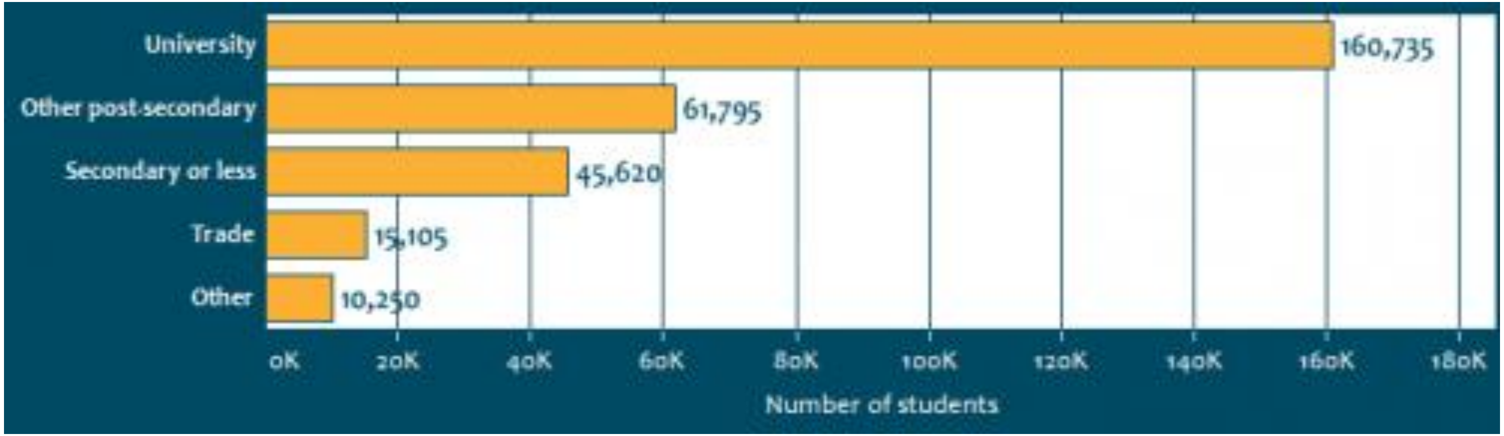
Level they Study



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Canada Cont'nd

Source:

Canada's International Education Strategy 2012, Dpt of Foreign Affairs, Trade & Development

Source:

Canadian Bureau for International Education (CBIE), A World of Learning: Canada's Performance and Potential in International Education (2014)

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New Zealand

- Double economic value of international education by 2025 to $5 billion (up from $2.85 billion in 2013)
- 2025 roadmap main driver for international education with strategic stakeholders
- Diversify into new markets instead of relying on traditional South East Asian markets
- China, India and South Korea main markets
- New plan to diversify over next 10 years up to 2025

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DESTINATION 2025

		CURRENT	2025 SCENARIO 1	2025 SCENARIO 2
PARTICIPATION	Number of international education providers	8	8	8
ENROLMENT	Number of onshore international students	23,884	30,007	35,550
	Average students per University	2,986	3,751	4,444
VALUE	Tuition fee income	$376m	$635m	$752m
	Tuition fees per student	$15,746	$21,162	$21,162
	EVA	$963m	$1,534m	$1,818m

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DESTINATION 2025

	Current	Destination 2025
Markets	> Dominance of China as source > Dominance of Auckland as destination > Use of offshore agents & social media > Attendance at fairs and expos > Twinning/articulation agreements > Increased competition	> A strong New Zealand universities story > Individual but complementary New Zealand brands > More diversified markets > Greater use of alumni as ambassadors > Expanded Study Abroad and scholarship markets > More students from offshore and onshore pipelines
Products & Pathways	> All 8 universities in QS top 500 > New Zealand outperforms ISB benchmark for learning experience & student support > Taught 180 pt Masters introduced > PhDs > Study Abroad > Some students through onshore pathways > Limited offshore delivery (and few enablers)	> Ongoing student-centred teaching and support in quality institutions > Courses in global demand > Courses that can best be studied in New Zealand > Blended online/on-campus delivery > Enhanced study experiences > Work-ready graduates
Resourcing	> Limited institutional financial capacity to undertake offshore delivery > Institutions and government invest in market development	> More freedom to deploy balance sheets > New funds for targeted initiatives
Capability & Leadership	> Limited community understanding of the value of international students > Fragmented entry processes	> International students are celebrated > International education becomes professionalised > Streamlined entry processes
Partnership	> Government agencies vary in their support for the 2025 goals > Few offshore teaching collaborations between New Zealand universities	> More agencies embrace the 2025 goals > Increased offshore partnerships > Enhanced regional strategies > Increased engagement with employers

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PRIORITY CHOICES

- Develop a New Zealand universities' story to promote the main benefits of our system

Markets

- Use offshore alumni as New Zealand education ambassadors

Markets

- Enable better access to capital and R&D for international growth and risk sharing

Resourcing

- Collaborate for offshore projects

Resourcing

- Market the value of international students to New Zealanders

Markets

- Optimise recruitment and admissions policy / processes across the sector

Markets

- Increase collaboration and integration within and between industry and government

Partnership

- Create and share relevant and timely market research and intelligence

Markets

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Source:

University Sector Strategic Roadmap – Final Summary 2015

Education New Zealand

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Australia

- 585,846 international enrolments in Sept 2015 which is a YTD increase of 10.2%
- Top 5 nationalities represented over 50% of total enrolments
- Focus on partnerships with embassies, consulates, agents, private companies etc
- Top research partners in UK, USA and China
- Top recruitment markets China and India
- Future potential Middle East & Latin America
- 2025 plan to get away from East Asia focus
- AUSTRADE

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	Enrolments			Commencements		
Sector	***YTD Sept 2014***	***YTD Sept 2015***	***Growth on YTD Sept 2014***	***YTD Sept 2014***	***YTD Sept 2015***	***Growth on YTD Sept 2014***
Higher Education	240,046	263,076	9.6%	98,882	107,160	8.4%
VET	131,326	149,371	13.7%	81,093	89,804	10.7%
ELICOS	110,018	117,505	6.8%	80,226	83,909	4.6%
Schools[2]	17,282	19,571	13.2%	8,504	10,040	18.1%
Non-award	32,815	36,323	10.7%	26,647	27,791	4.3%
Total in Australia	**531,487**	**585,846**	**10.2%**	**295,352**	**318,704**	**7.9%**

The Top 5 nationalities contributed 51.0% of Australia's enrolments in all sectors

Nationality	***YTD Sept 2014***	***YTD Sept 2015***	***Growth on YTD Sept 2014***	***Share of all nationalities***
China	137,614	155,885	13.3%	26.6%
India	55,779	65,853	18.1%	11.2%
Vietnam	27,173	27,216	0.2%	4.6%
Republic of Korea	24,953	25,558	2.4%	4.4%
Thailand	22,235	24,333	9.4%	4.2%
Other nationalities	*263,733*	*287,001*	*8.8%*	*49.0%*
All nationalities	**531,487**	**585,846**	**10.2%**	**100.0%**

Double-digit increases in markets with over 8,000 enrolments (outside top 5)

Nationality	***YTD Sept 2015***	***Growth on YTD Sept 2014***	***Rank***
Nepal	17,885	11.3%	8
Pakistan	14,611	12.9%	10
Hong Kong	14,342	11.2%	11
Taiwan	11,667	33.0%	13
Italy	8,025	29.0%	19

1 The Department of Education and Training data on enrolments and commencements (including the data in this update) relate only to international students in Australia on a student visa.

2 Commencements in schools for the current reference period are not strictly comparable to earlier years due to recent changes to secondary school level courses at a single large provider.

Competitor Activity in Africa

- Employing In Country Reps in small/large agents spread across continent & providing budgets
- Gov dpts aligned to meet needs to get visas processed in timely manner
- Visits to agencies / key stakeholders
- Events in market such as Austrade etc
- University activity and recruitment trips, also taking part in traditional UK dominated events
- Employing locals in market similar to BC
- Signing traditional UK focused agents

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Competitor Activity in Africa cnt'd

- Australian ambassador visiting agents office (Nigeria)
- Canadian HC attending Rainbow fair in Uganda
- Austrade employing PFL employee in Accra
- Sourcing strategic partnerships such as colleges / international schools
- Promotion of post study work opportunities
- Dedicated websites 'studyinaustralia.gov.au/africa'
- Destination marketing!

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International Institutions at Agent Events – West Africa

PFL Ghana & Nigeria Oct 2015	
UK	11
Canada	1
USA	3
NZ	0
Australia	4
Int'l Pathways*	3
*Promoting many other partners	

BCIE Nigeria Fair Nov 2015	
UK	20
Canada	0
USA	6
NZ	0
Australia	2
Int'l Pathways*	1
*Promoting many other partners	

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Examples of Response to the Competition

Use of Alumni in market

- Video Testimonials of alumni in jobs at home and in country
- Use them to get meetings in country
- Hold regular events in country where you can network with top alumni (Yakubu Dogara at RGU)
- Incentivise alumni
- Friends and family discounts
- Make alumni a priority as they are championing your institution

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Agents

- Account manage agents like clients in a commercial sense
- Set them targets per office or per country and remunerate them accordingly
- Train where possible and put a face to a name
- Fam trips and bonuses / award top performing agents
- Revisit agents and ROI

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Scholarship Bodies

- Where are your scholarships students coming from and what area?
- Set meetings with relevant dpts to discuss previous, ongoing and future students / funding
- Be flexible with them and treat them as priority applicants / clients
- Listen to the needs of the dpt and goals they want to achieve
- Create programmes they want instead of flogging a dead horse!

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Work Placements / Internship Opportunities

- Paid/unpaid placements or internships to international students?
- Part of programme or outside of programme?

(Consultancy project in MBA school)

- Offer projects related to industry as part of course

(Energy Management at RGU)

- Highlight benefits of careers service

(Employability workshops, CV writing, interview techniques etc)

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Niche Programmes

- Do you offer a niche set of programmes?

(RGU is Oil & Gas / Energy focused)

- Develop programmes to suit the market?

(market intel for specific courses)

- Can programmes be delivered in different ways?

(Short courses, training, online, in country etc)

- Accreditations and industry associations

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Research

- Promote research opportunities across all faculties / schools
- Turnaround applications in a timely manner
- Consider split PhD’s with key partners
- Create fit for purpose and appropriate literature to promote research
- Use agents to recruit research student

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ODL – Online Distance Learning

- Do you have a platform for online delivery? (we have 3,000 students studying online MSc courses)
- Highlight the benefits of this study mode (flexibility, payment options, exit routes etc)
- Exit routes for this mode
- Consider dropout rates which varies across the board

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Summary

- Think more commercially when dealing with agents / stakeholders
- Use alumni, staff, students more effectively in market
- Revisit pipeline of students from past and see where you can pick up more (scholarship bodies you don't visit)
- Offer suitable products to suitable markets
- Be more industry savvy (research projects)
- Make quicker decisions at top level!
- Be in it to win it!

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Where are Indian students going?

Country	12/13	13/14	VISA + PSW
USA	102,673	132, 888	£132 and OPT
CANADA	34,882	38, 877	£75 and 3 years
AUSTRALIA	34,130	29,573	£253 and 2/3 years
UK	21,000	20,000?	£322 and various
GERMANY	9,619	11,860	£42 and 1.5 years

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USA – disorganised success

975k students of which 133k are Indians in 2,968 Universities

7 EducationUSA centres around the country

Fulbright – Nehru Initiative for scholarship

Obama Singh $5m each

No real strategy and lack of data plan

Focus on how to set up partnerships and how to work with agents

Community Colleges not really worked

4,500 students to India on ‘passport to India’ initiative

Education USA

Your Official Source on U.S. Higher Education

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CANADA – welcoming perception

293k international students, of which 39k are Indian in 98 Universities

MBA road shows -5 cities in Sept – especially in North East States

400 University MOU in place but not active

Modi visit in April 2015 – focus on skills, internships and phd mobility

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AUSTRALIA – coordinated approach proving popular

347k international students of which 29.5k are from Indian in 43 Universities

New 20m 4 years strategic research plan

Aus-trade carries out promotional activity

Of the 43 Universities in Australia, 21 have an India presence

250 MOU's and 400 academic links

Reviewing how we work with agents – aligned to London statement

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NEW ZEALAND - punching above its weight

$1.05M spend on marketing - but only
3 promotional staff in India (44k spend)

NZD India Council focused on research

‘ThinkNew’ campaign to push mobility
(7,248 students in 2012 in 8 Univ)

Scholarship programme small but
active

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GERMANY - no real promotion but growing threat

300k international students of which 11,800 Indian (doubled in last 4 years)

Science and Technology Drive

Oct had 3rd bilateral discussions

German House – one 6 around the world. 15 instiutes under one roof

UGC/DAAD programme E 3,5 each

DAAD
Deutscher Akademischer Austausch Dienst
German Academic Exchange Service

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UK – old friend but becoming less attractive

GREAT CAMPAIGN

EMPLOYABILITY

ACCESS – SCHOLARSHIPS

QUALITY

2016 UK-INDIA YEAR OF EDUCATION RESEARCH AND INNOVATION

AGENTS ENGAGEMENT

SCHOOLS

DIGITAL AND SOCIAL MEDIA

KNOWLEDGE IS GREAT BRITAIN

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