



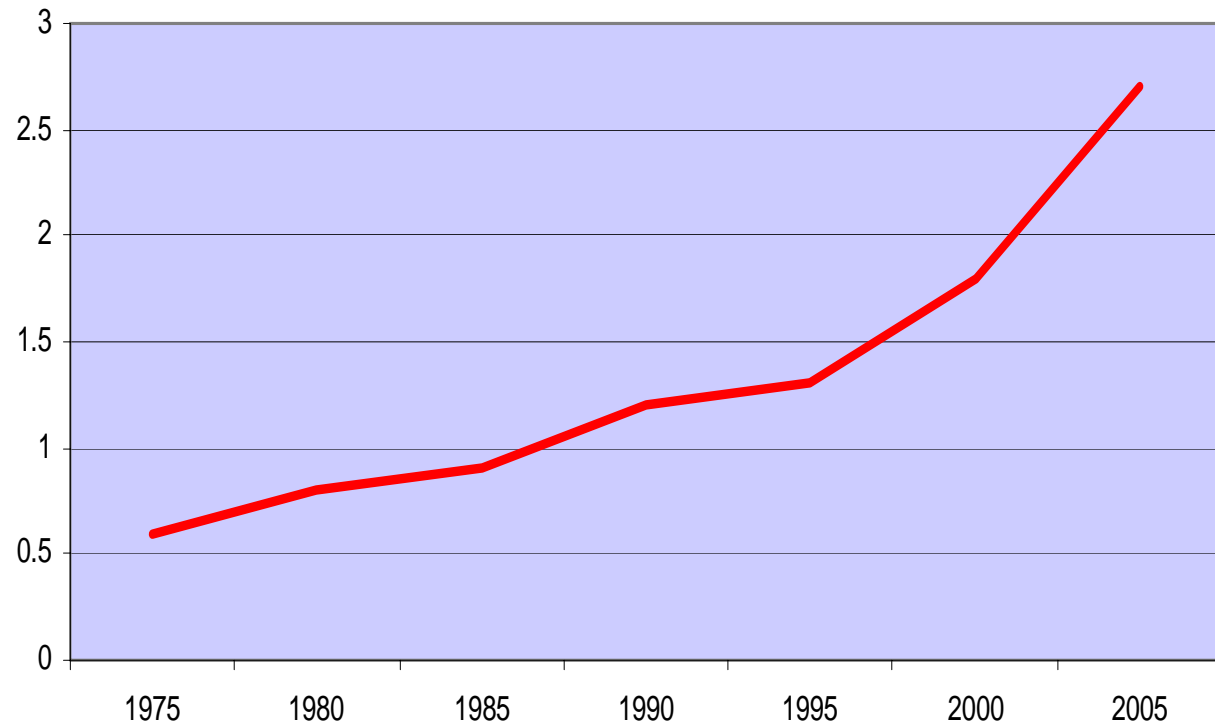
Postgraduate  
Education in the UK:  
trends and  
challenges

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## Global Trends

- According to the OECD (2007) over 2.7 million students enrolled outside their home country in 2005
- Over 120 million students study in Higher Education across the world, UNESCO 2007 and BC estimates
- Global proportion of all students studying overseas (in relation to the tertiary education in country expansion) has only increased by 2% for the same period
- Students from China estimate 15% of the total internationally mobile students

### HE Students Studying Overseas (in millions)

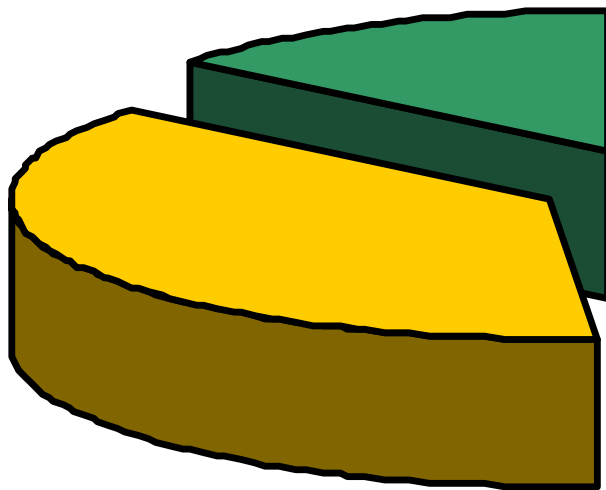


## Postgraduate trend overview

- Postgraduate education marked the fastest growth since 1996:
  - » Postgraduate taught degrees increased by 141% since 1994
  - » Postgraduate research degrees increased by 76% since 1994
- The ratio between PG and UG changed from 39% : 61% in 1996 to 49% : 51% in 2006.

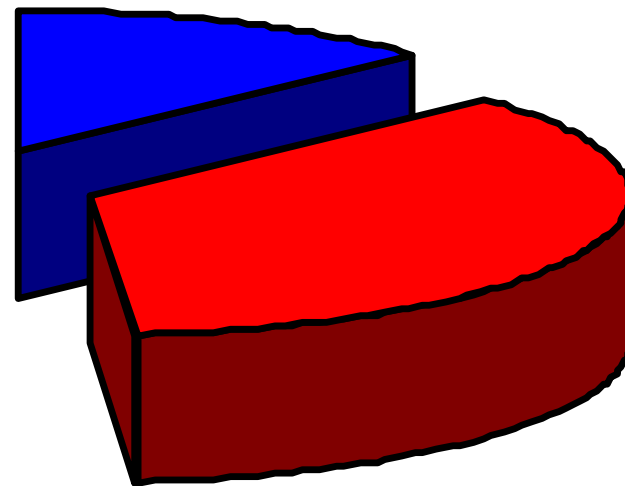
# International Students' Level of Study 2005/06

**Other  
undergraduate  
50715**



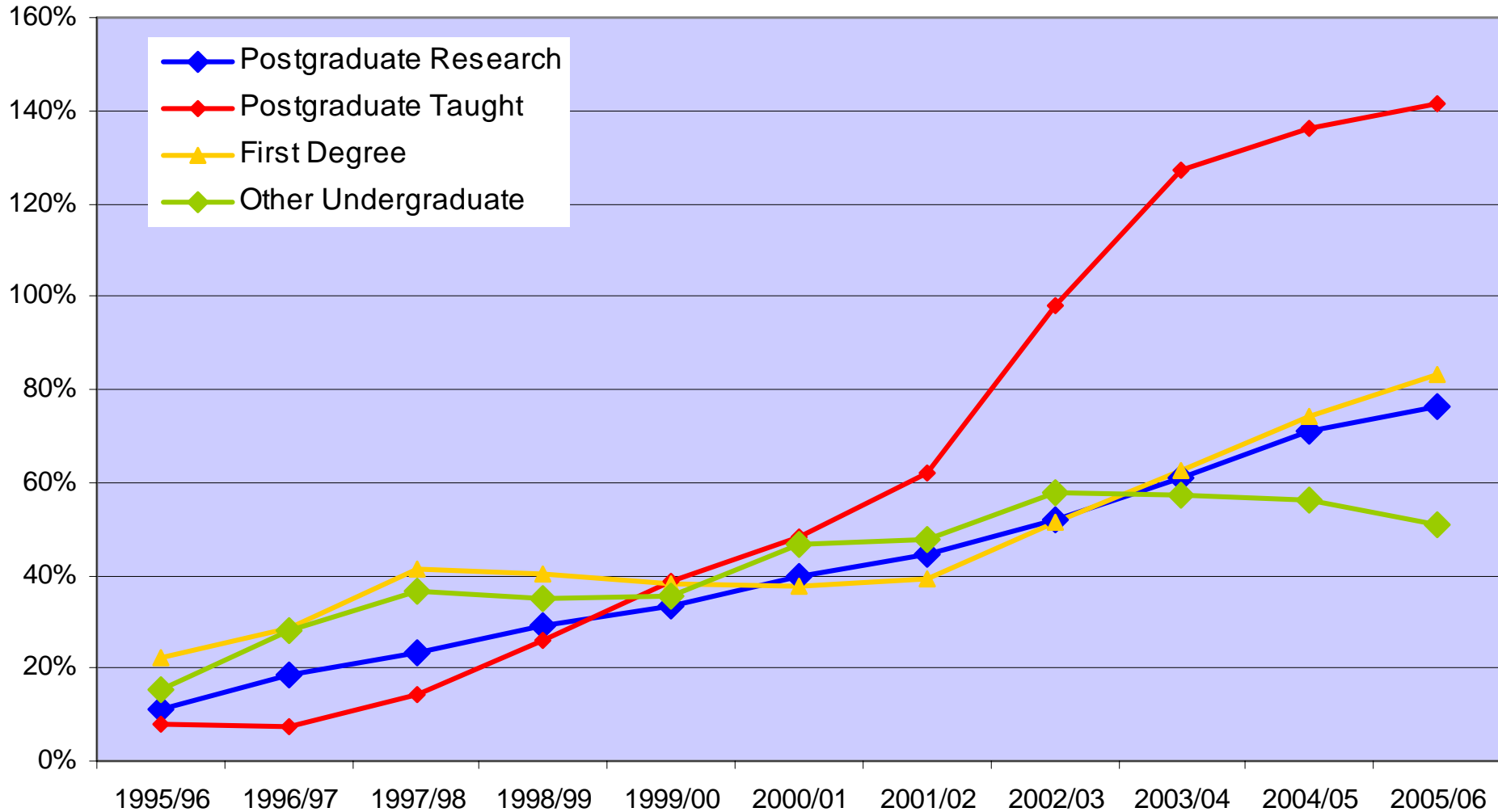
**First degree,  
132400, 38%**

**Postgraduate  
research, 46930,  
13%**



**Postgraduate  
taught, 126035,  
35%**

# International Students' Level of Study Trends 1995 - 2006



# Internationalisation of UK Higher Education

## International students in proportion of the total students (UK + non UK)

Postgraduate Research	41%
Postgraduate Taught	29%
First Degree	10%
Other Undergraduate	10%
Total	15%

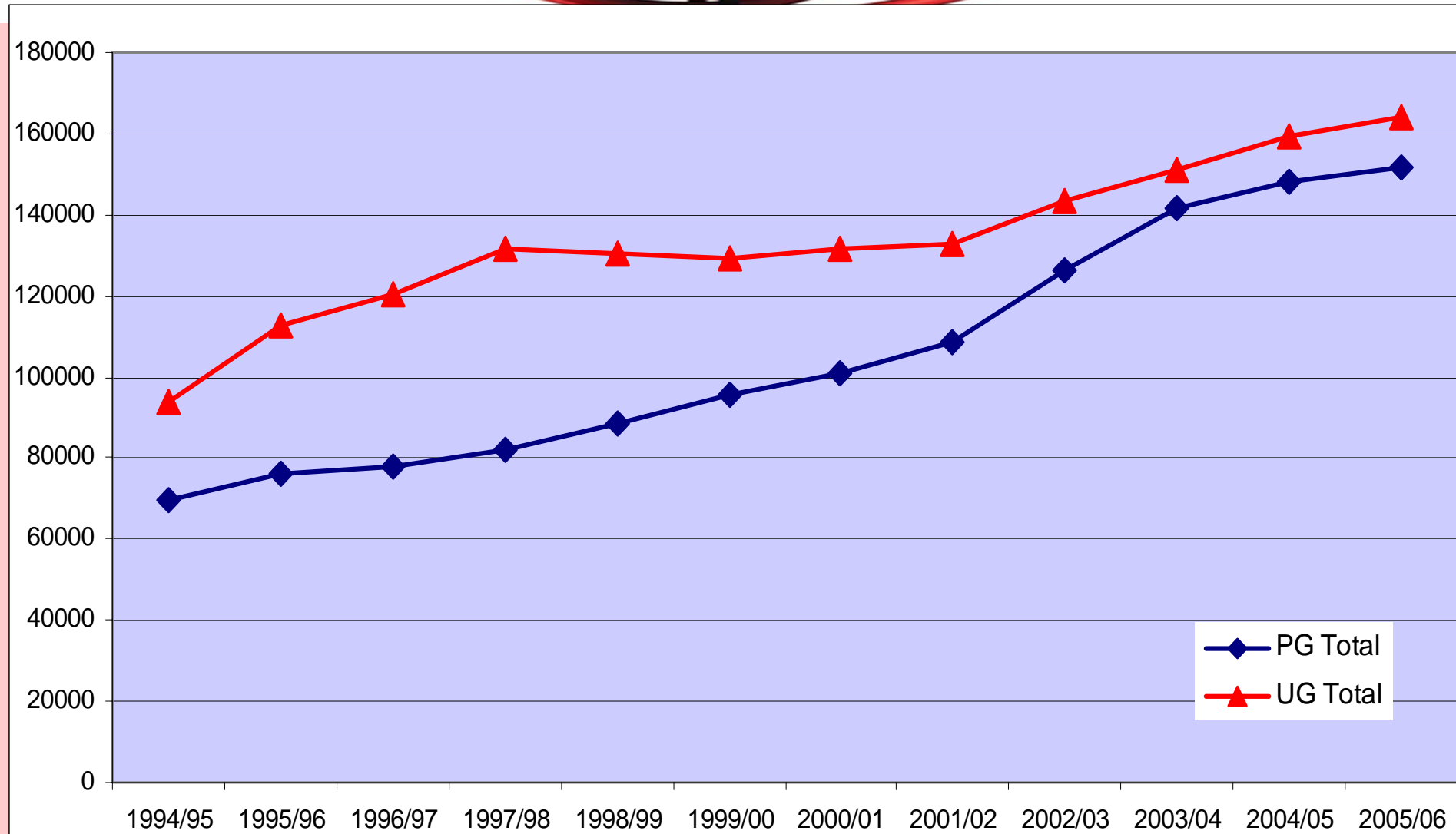
## UK/US Comparisons

### International students as % of the total student population

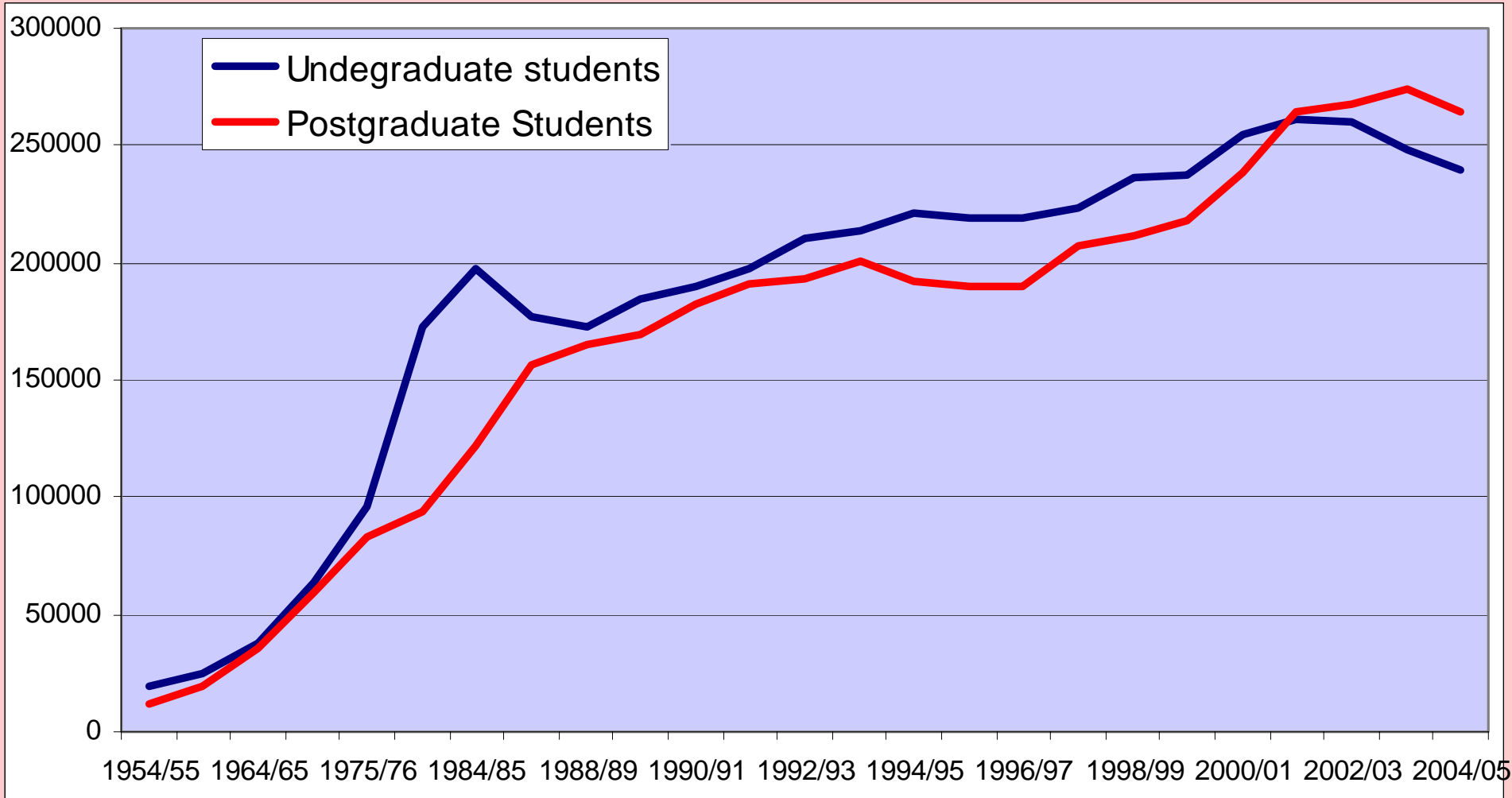
Level of Study	UK	US
Postgraduate	31%	13%
Undergraduate	10%	2%
Total	15%	4%

Source: HESA, IIE; authors' analysis

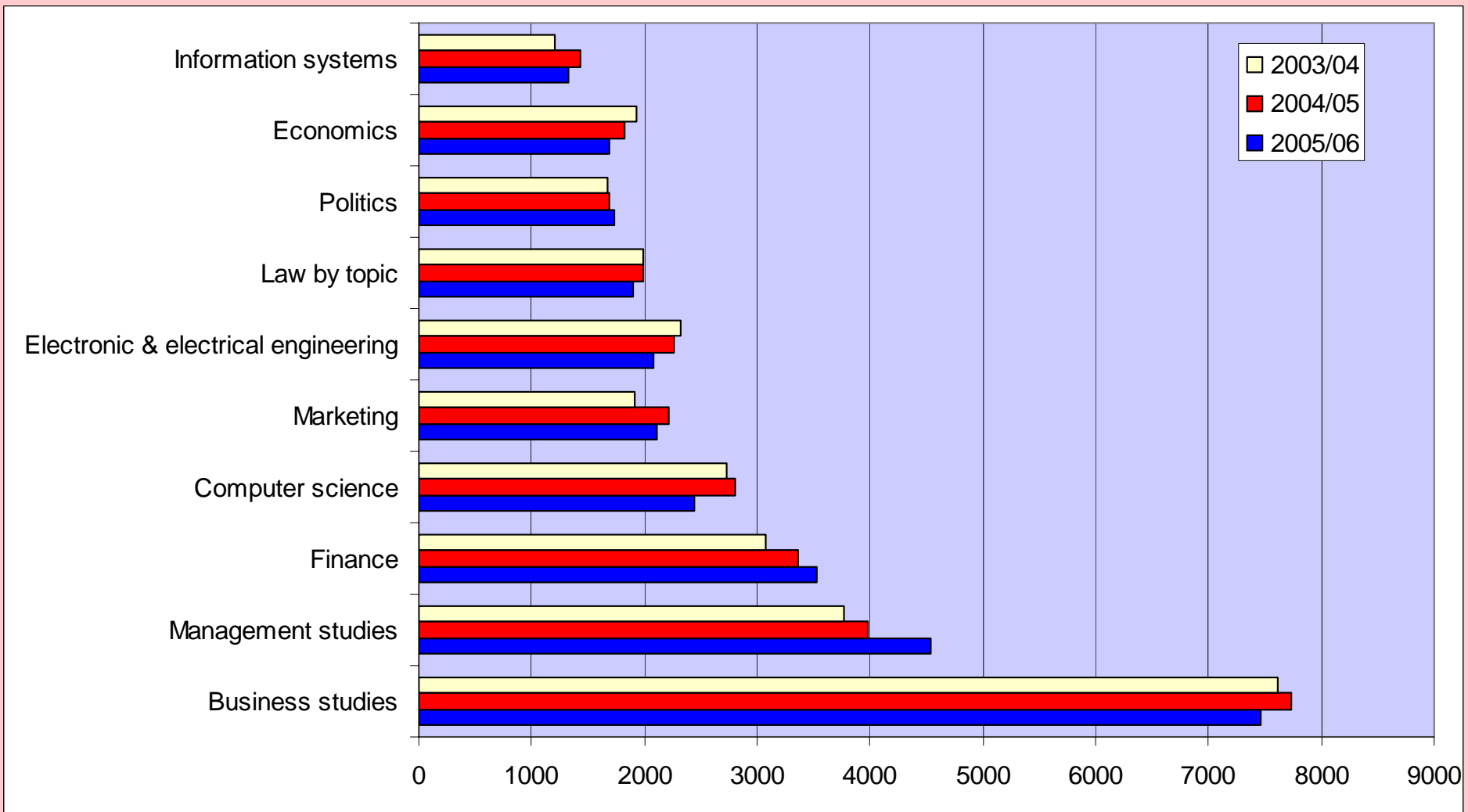
# International Student Enrolment in UK: UG vs. PG Study



# International Students Enrolments in USA: UG vs. PG Study

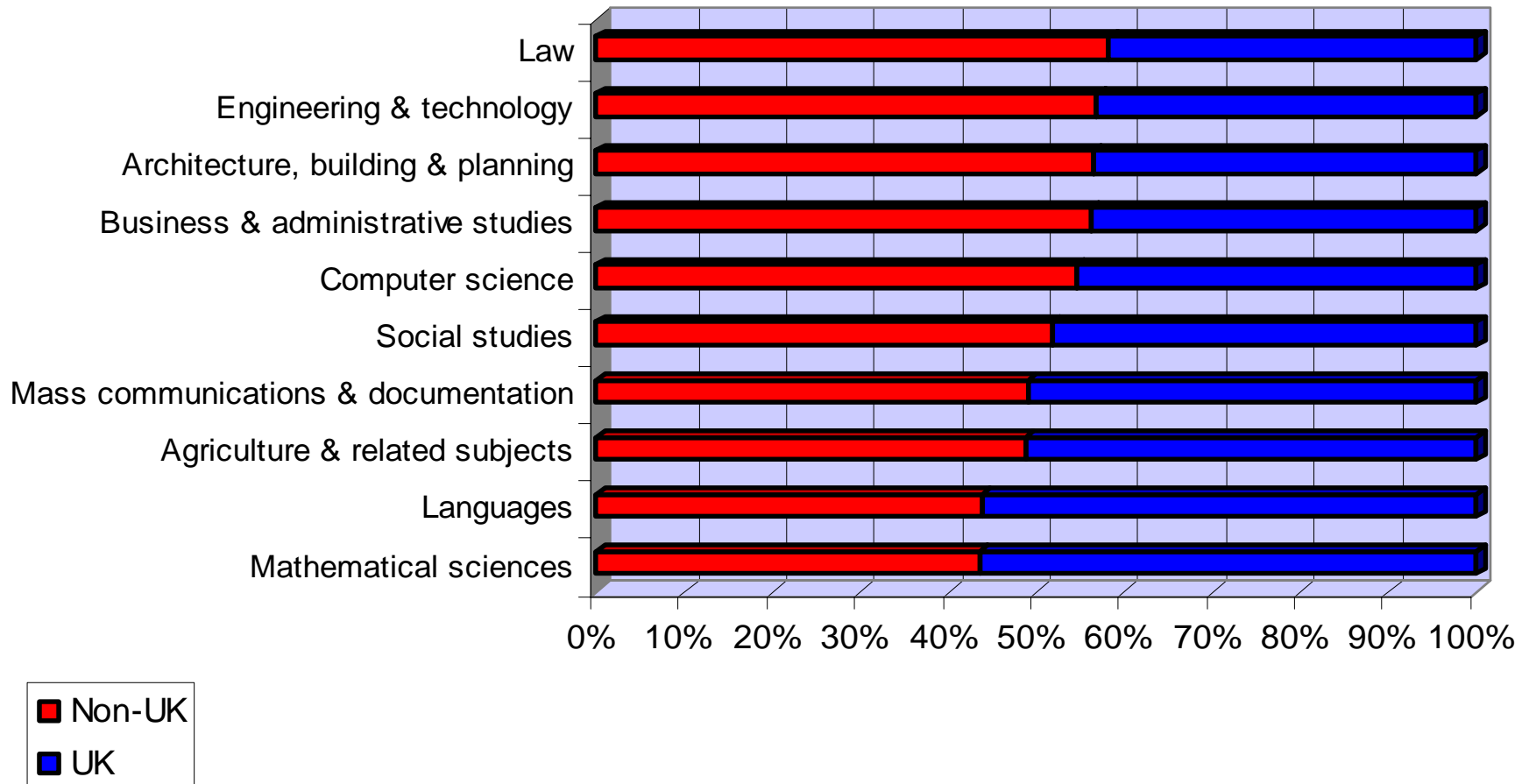


# Most Popular Subjects: PG Taught



# Subject Areas (Research) under Greatest Pressure to Recruit

## Ratio of international students to UK students in broad subject areas 05-06



# Latest HESA – Postgraduate top 10 countries

	2005/06	2006/07	Growth
China	27000	28005	1%
India	14325	18400	28%
USA	9040	9285	3%
Nigeria	5670	6870	9%
Pakistan	5165	6205	20%
Taiwan	5050	5690	13%
Malaysia	3475	3770	9%
Canada	3335	3440	3%
Japan	3070	2750	-10%
Hong Kong	2640	2530	4%

## Other countries to watch

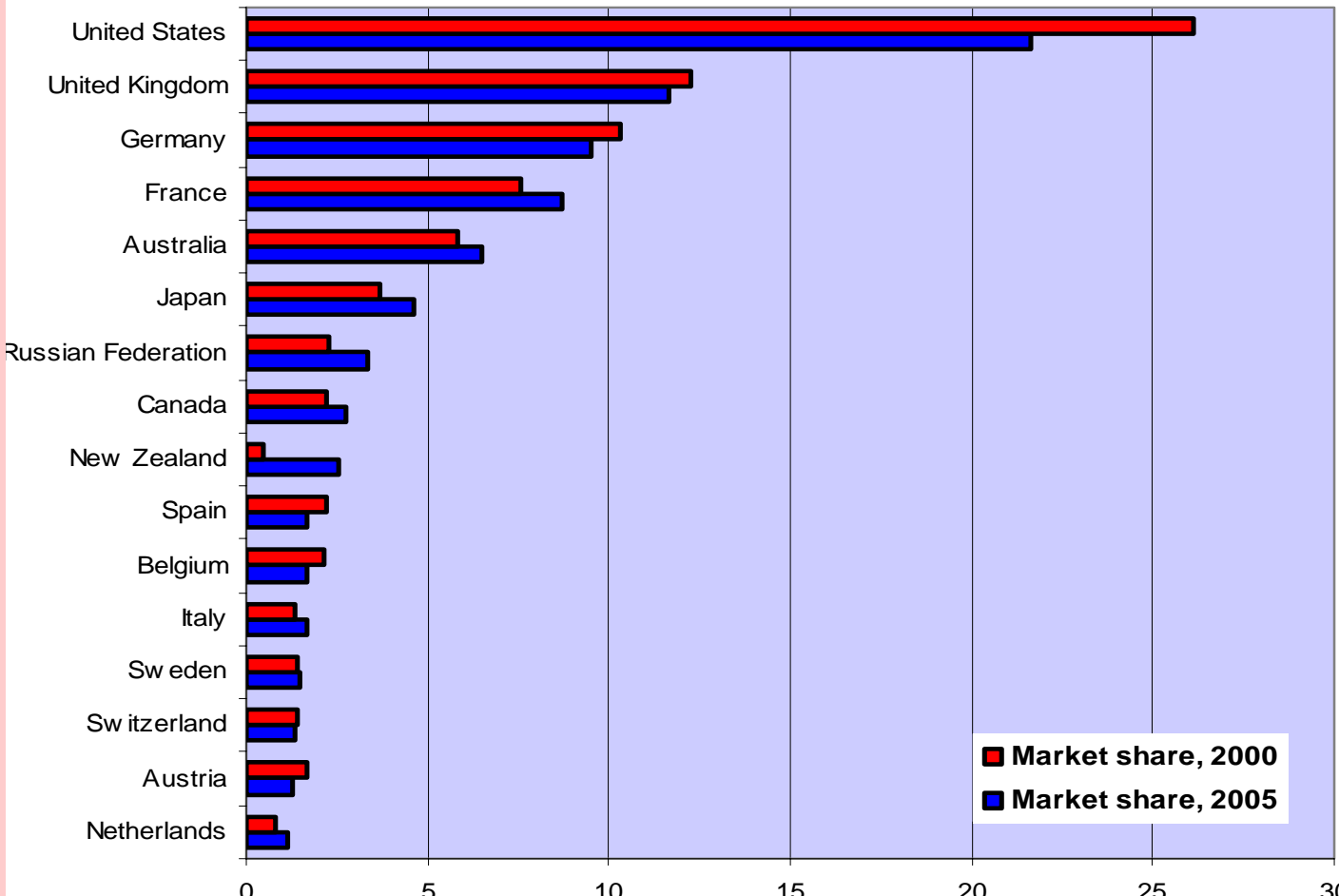
	2005/06	2006/07	Growth
Thailand	3270	3605	10%
South Korea	2030	2185	8%
Bangladesh	1085	1350	24%
Sri Lanka	1040	1280	23%
Saudi Arabia	1795	2015	12%
Iran	1280	1550	21%
Libya	1065	1460	37%
Russia	1100	1270	15%

## Increased market dynamics

- Increased competition in provision of international education
- Increased and improved domestic provision of education
- Traditional sending countries becoming host countries (at expense of the major host countries)
- Decreasing market share for the major host countries
- Slowing down growth rates for the traditional host countries
- Increased education provision in English language beyond the Main English Speaking Countries

# Global Market Share

**World Market Share Change (%) 2000 - 2005 (countries with >1% global market share)**



Over half of the students (52%) study in four countries (US, UK, Germany and France). Compared to 2000, this is a decrease from the 56% which these countries used to host

The loss in market share over the past 5 years has been absorbed predominantly by the USA, and to a smaller extent UK and Germany

Competition: increasingly sending countries becoming host countries

<b>China</b>		<b>Japan</b>		<b>Malaysia</b>	
Korea	57504	China	74292	Indonesia	7541
Japan	18363	Republic of Korea	15974	China	7310
United State	11784	Taiwan	4211	Bangladesh	6517
Vietnam	7310	Malaysia	2156	Pakistan	1956
Indonesia	5652	Vietnam	2119	Nigeria	1813
<b>Total</b>	<b>162,695</b>	<b>Total</b>	<b>117,927</b>	<b>Total</b>	<b>44,390</b>

## Beyond statistics

- Most current data is 1.5 years out of date;
- Issue: most of the PGT students reported would have left by the time statistics are made available
- New visa system, self reporting survey and UKPASS will all be useful indicators in the future
- The British Council approach:
  - Forecasting the student demand project and student decision making

## Beyond Statistics: Student Decision Making Study

To identify and examine the key choice factors for students choosing overseas study

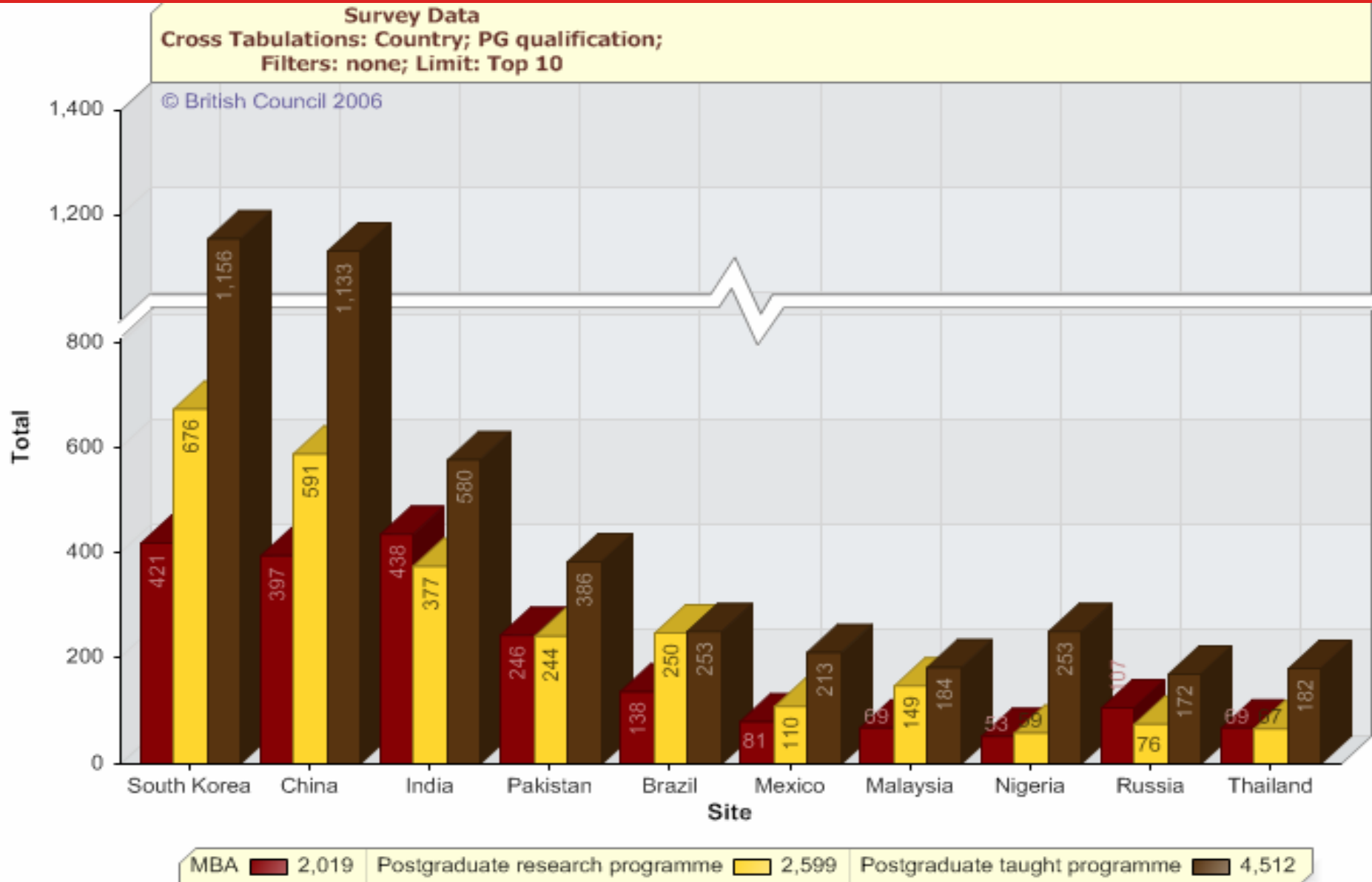
To identify and consider the factors, which determine which country, city, institution and course they choose and determine the timeframe over which they make these decisions

To identify UK's competitive advantage compared to US and Australia and some emerging markets.

To determine the key influences and influencers upon students decisions and their impact

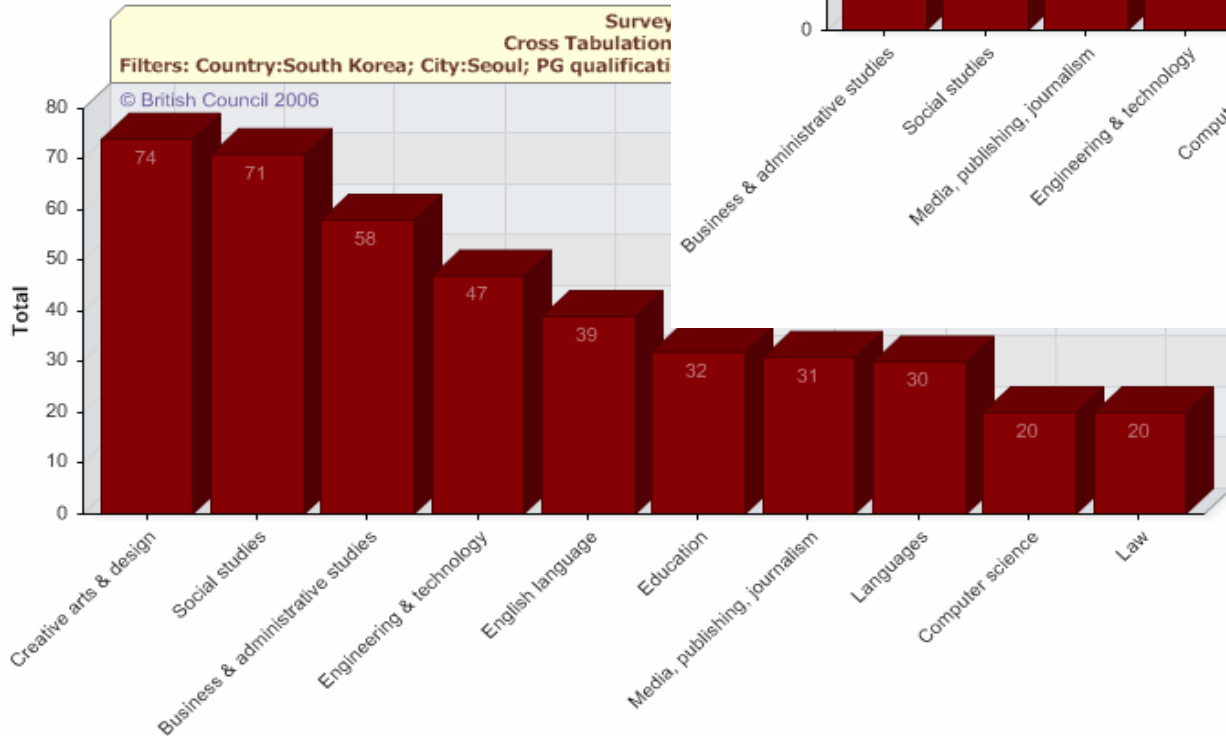
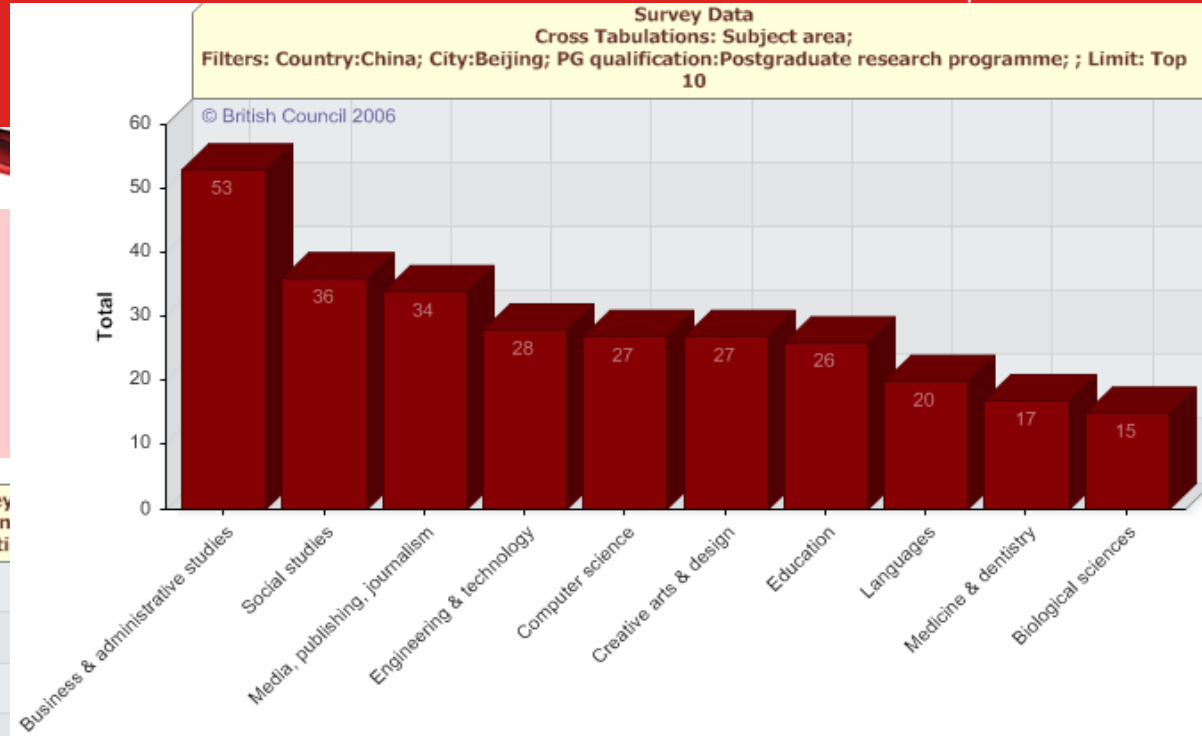
To ascertain changes occurring in the different markets, whether any of these represent a discernible shift and why these changes are occurring.

# PG demand in selected markets



# Demand at city level

## PGR Demand in Beijing



Interests  
total 283

## PGR Demand in Seoul

Interests  
total 422

# Student Mobility Forecasting

- Revisiting Vision 2020 study
- Predictions are country specific and short to mid-term (aiming at 3 to 5 years)
- Study objectives include:
  - To develop model, which forecasts student mobility to UK from the major sending countries (the prototype will be developed using China data and then replicated in other major countries)
  - Calculate price elasticity index for the countries where the student mobility will be forecasted and other country specific parameters;
  - The forecast of demand for UK education should be sector specific, i.e. Higher education (1st Degree, Postgraduate Taught, Postgraduate Research), Further education and Trans-National Education. Where possible, demand for broad subject areas should be identified

## PMI

The Prime Minister's Initiative launched May 2006 aims to position the UK as a leader in international education.

Focusing on four strands:

- Marketing and recruitment
- Collaborative partnerships and strategic alliances
- Student experience

Challenging tactical targets – an additional 70,000 international students in higher education and an additional 30,000 in further education, by 2011.

## Priority countries

**China**

**India**

**USA**

**Canada**

**Australia**

**Japan**

**Korea**

**Hong Kong**

**Malaysia**

**Singapore**

**Taiwan**

**Thailand**

**Indonesia**

**Vietnam**

**UAE & Saudi**

**Mexico**

**Brazil**

**Russia**

**Turkey**

**Pakistan**

**Sri Lanka**

**Bangladesh**

**Ghana**

**Nigeria**

# PMI2 Marketing

Marketing and brand strategy focussed on four themes

- Employability
- Innovation
- Language
- Value

Delivered through a range of channels

- Media and publications
- Targeted presentations
- E-marketing
- Events and campaigns
- Agents and intermediaries

## Strategic alliances and partnerships

### To position the UK as a “partner of choice”

*Engaging with countries at two levels:*

**Government & policy level:** UK engaging pro-actively and collaboratively to address global education challenges

**Sector & institutional level:** building strong strategic partnerships which will jointly and creatively address these challenges in practice

## PMI2 Connect

Partnerships fund launched September 2007 targeted at

- collaborative delivery
- research collaboration
- outward mobility

Very high response from the sector; results of bidding round to be announced shortly

Aim of the fund is to build long term, sustainable partnerships between the UK and other countries

Builds on other initiatives e.g. Russia Bridge and UKIERI

## Conclusions

- Importance of national strategy on international education in increasingly competitive market
- Growing importance of the PG degrees: highest growth rates
- Many research subject areas (e.g. Law, Engineering, Architecture, Business, Computer Science and others) with non-UK students outnumbering the UK students
- Postgraduate research students: important for vitality of research activity in departments
- Importance of up-to-date market data on demand for education, especially at postgraduate level.
- [WWW.britishcouncil.org/eumd](http://WWW.britishcouncil.org/eumd)