

INDIAN STUDENT SEARCH DATA

Drawing on online traffic of 77 million visits per year to IDP Connect's international course search sites, the IDP Connect insights Tool shows where, and what, students across the world are interested in studying. This briefing provides an overview of Indian student interest in the UK over the past three years.

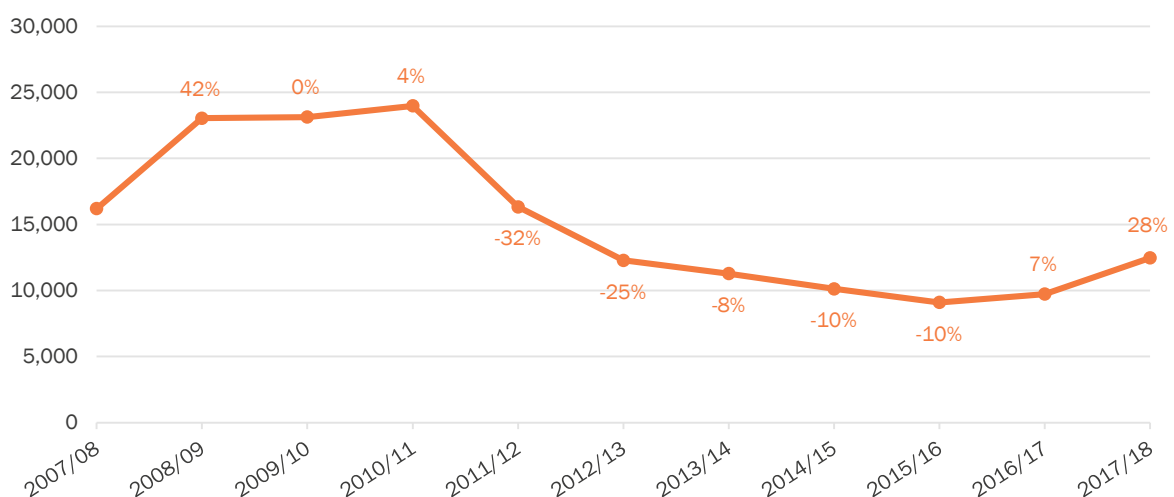
HOW DOES INSIGHTS DATA COMPARE TO STUDENT ENROLMENT FIGURES?

Time range for insights: January 2016 - December 2016 vs January 2017 - December 2017
Time range for HESA: Student records 2016 - 2017 vs Student records 2017 - 2018

OVERALL

According to the latest HESA data, new enrolments from India have increased by 28% in 2017/18, representing a growth of 2,745 students. Given the well publicised steady decline in numbers from India from 2011 to 2016, the increases of 7% (2016/17) and 28% (2017/18) mark an important and notable shift.

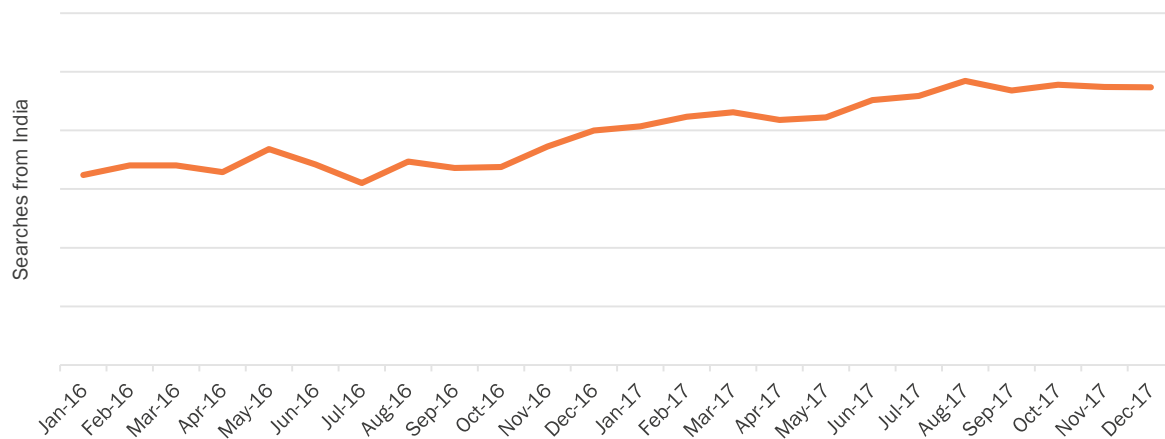
INDIAN STUDENT NUMBERS



Source: HESA

Insights data shows that over the two year period between January 16 and December 17, there was a steady and significant increase in interest from prospective Indian students exploring options at UK universities. Insights saw a 30% increase in interest, which closely matches the HESA overall growth figure of **28%** for new entrants in 2017.

INTEREST FROM INDIA TRACKED THROUGH INSIGHTS



Source: IDP Connect

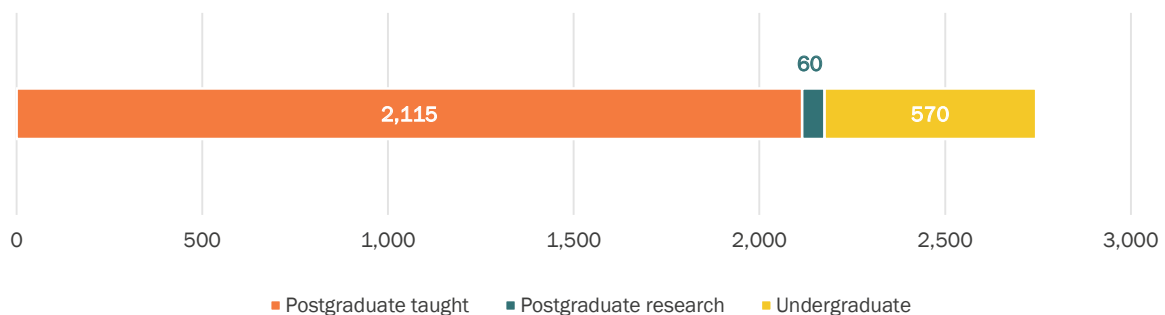
The data has a particularly sharp rise in interest from October 2016 to April 2017. This period aligns with the period during which the value of the pound was at its lowest since the 1980s, which could have had an impact on interest in studying in the UK.

| BREAKING DOWN THE RISE

BY LEVEL OF STUDY

The vast majority of growth was through increases in postgraduate taught students (up 2,115 students), though there was also growth at undergraduate (an additional 570 students) and postgraduate research levels (60 students).

GROWTH IN INDIAN STUDENT ENROLMENT BY LEVEL OF STUDY



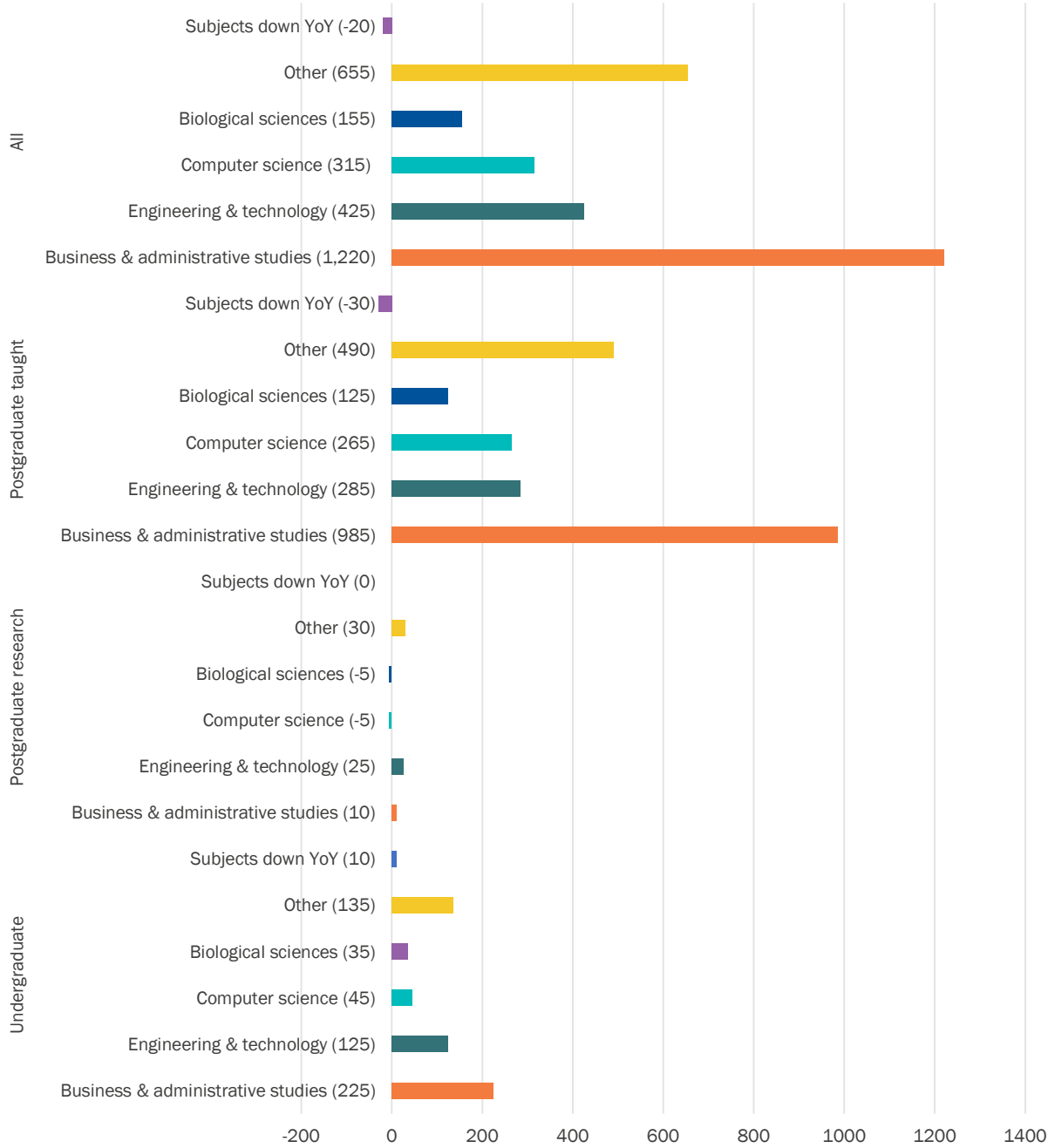
Source: HESA

75% of enrolments from India were at postgraduate level. This tallies closely to the research behaviour on the IDP Connect websites, where 83% of traffic looking at the UK from India is at postgraduate level.

BY SUBJECT AREA

Analysing the growth in Indian students by discipline between 2016/17 and 2017/18, there is growth in the vast majority of subject areas. There is particularly notable growth from business and administrative studies (+ 1220), engineering and technology (+425) and computer science (+315). The growth in business and administrative studies represents nearly half (44%) of the subject level growth. There were only two subject areas (historical and philosophical studies and education) where numbers decreased, cumulatively representing just 20 students.

CHANGE IN INDIAN STUDENT ENROLMENT BY SUBJECT



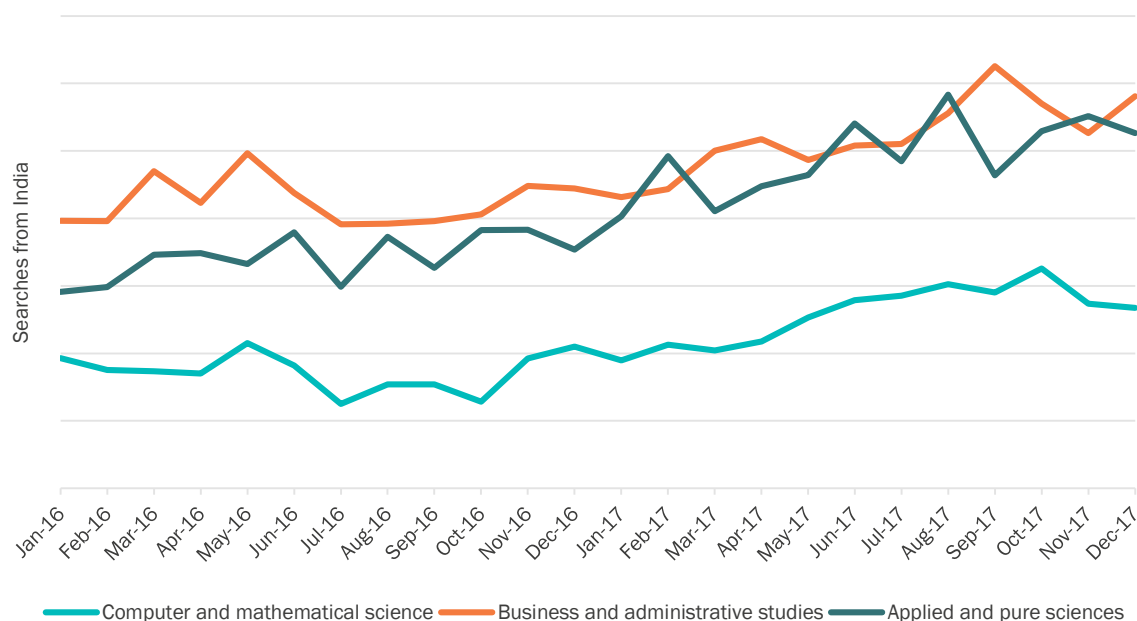
Source: HESA

From January 2016 through to December 2017, Insights data from India shows a year on year increase in interest for UK business and administrative studies courses of 23%, compared to the 32% seen through HESA data. Much of the increase for business and administrative studies is seen from February to September 2017.

Demand from India for the UK is up 50% in the computer and mathematical science subject area, compared to the 52% for computer science seen through the HESA data. There was a particularly steep increase in interest from March to October 2017.

Interest in applied and pure sciences is up 43% year on year. Although not directly comparable, the HESA subject areas of biological sciences and physical sciences saw an increase of 44% year on year. Demand here is spikier than for some other discipline areas.

% CHANGE IN INTEREST FROM INDIA BY SUBJECT



Source: IDP Connect

| INSIGHTS DATA FROM 2018

OVERALL

In 2018, interest from India continued to grow, although the rate of growth slowed. 304,000 users from India searched UK courses, representing a 13% year on year increase.

GROWTH IN INTEREST FROM INDIA

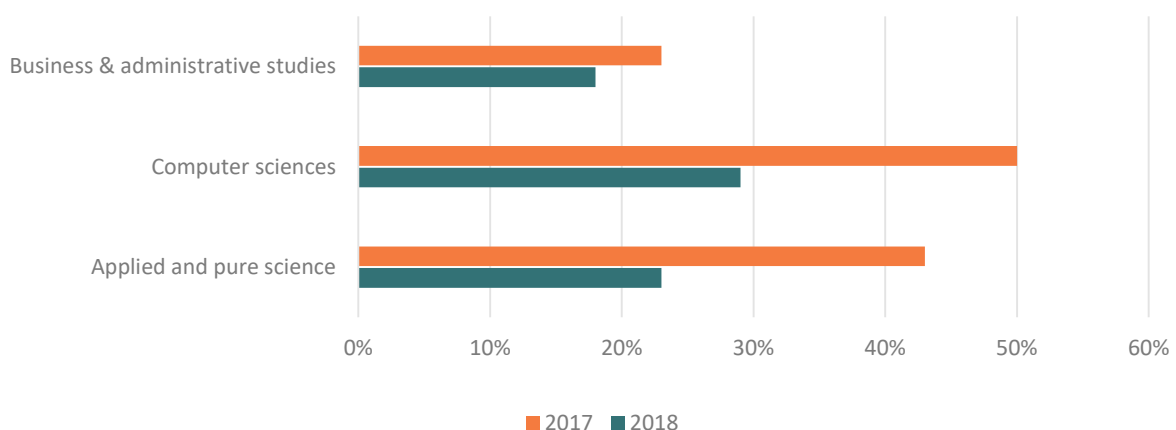


Source: IDP Connect

| BREAKING DOWN THE GROWTH

This graph shows year on year increases from 2016 to 2017 and from 2017 to 2018, across the three most popular subject areas for Indian students searching UK courses. Growth has slowed across all subject areas since 2017, but continues to be strong in the three discipline areas shown here. The biggest growth has been in computer sciences (+29%).

GROWTH IN INTEREST FROM INDIA BY SUBJECT



Source: IDP Connect

FIGURE NOTES:

1. All figures are rounded to the nearest 5, and percentages are built on the rounded numbers - not the underlying data.
2. Integers are the difference between 2016/17 and 2017/18 for that category.
3. All percentages are rounded to the nearest integer.
4. ‘% share of growth’ excludes any negative values, and calculates that row’s share of the Indian growth to the UK. For example, in the 'subject' section, the sum of positive subjects is 2,770 – while the change for business and administrative studies is 1,220. Therefore, business and administrative studies makes up 44% of the overall growth areas.
5. ‘YoY % change’ simply shows the percentage difference between 2017/18 and 2016/17 by subject.

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