

# Spotlight on India

## Recruitment Insight and Transnational Education Trends

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studyportals



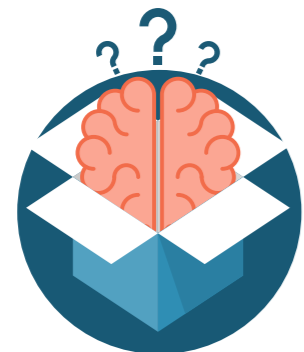


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Part One

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# Introduction and objectives

# Introduction

This report reviews data showing **key higher education recruitment trends from India.**

In April 2023, UN estimates showed that **India surpassed China as the country with the largest population**, and in 2022, Indian students are second behind only China in terms of international students studying in the UK. Around 750,000 students from India now study at a university located abroad, a rise of 300,000 in the last five years. It is not just the **scale of international recruitment of India**, but also **the pace of change**, that present **opportunities for foreign universities**. For instance, in 2021/22, the US witnessed a +19% increase in enrolments from India compared to a -9% decrease in enrolments from China\*.

Whilst the UK, US, Australia, and Canada remain the preferred study destinations of choice, Indian students now study in more than 240 countries globally. Outside of the big four, countries with over 5,000 higher education students from India include Bangladesh, UAE, China, Georgia, Germany, Ireland, Kazakhstan, Kyrgyzstan, New Zealand, Oman, Philippines, Russia, Saudi Arabia, and Ukraine\*\*.

\* <https://opendoorsdata.org/data/international-students/enrollment-trends/>

\*\* <https://economictimes.indiatimes.com/nri/study/these-countries-are-the-most-preferred-education-destination-amongst-indian-students/articleshow/98903435.cms>

# Objectives

The purpose of this report is to provide **insight on prospective Indian student** interest to study abroad, revealing their **preferred study destinations**, what **subject areas** they seek to study, and which **Indian cities generate the most interest** to study abroad. Doing so allows higher education institutions to leverage these insights and understand the opportunities that may help to establish a strong presence in the Indian education market, in turn contributing to the growth and development of India's higher education sector.

The report looks at student interest from India for Bachelors and Master's programmes on Studyportals, as measured by pageviews from March 2021 to April 2023. The report then takes a closer look at the UK as a destination for Indian students. This section of the report is based on enrolment data from the UK's Higher Education Statistics Agency (HESA). It is important to note that this data is based on historic actual enrolments, while Studyportals data is based on student search interest and is forward looking. Although interest is a good indicator for future enrollments, difficulties in obtaining visas or financing can cause discrepancies. It is recommended to use enrolment numbers and additional research to obtain a complete and accurate picture.



Part Two

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# Analysis of Indian interest to study abroad

## a. Trends for Bachelor's programmes

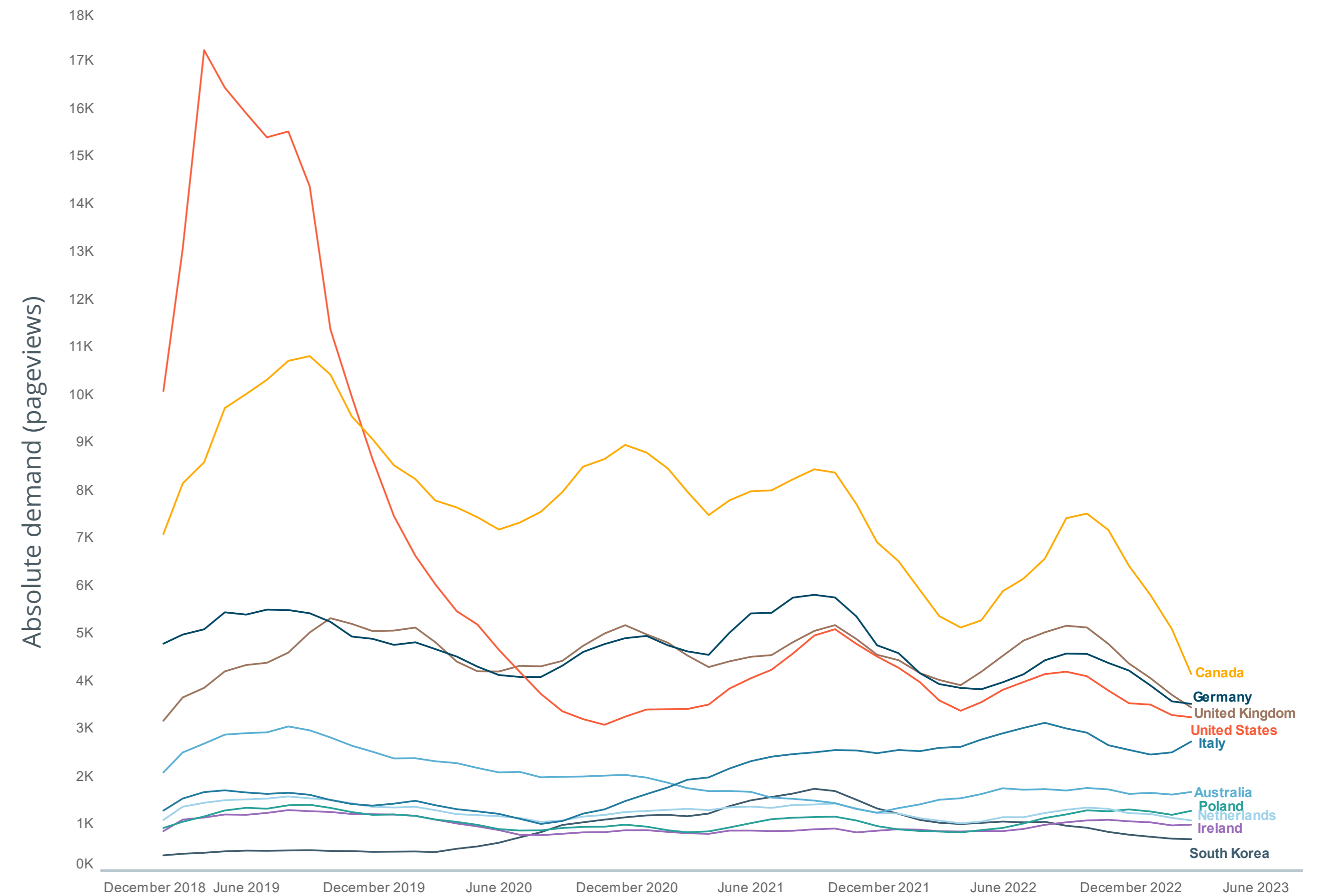
# Declining undergraduate interest in Canada puts it in line with competitors

Absolute student interest from prospective undergraduate students in India, for degrees in Canada has not fully recovered to pre-pandemic levels.

While programmes in Germany, the UK, and the US tightly compete for Indian interest, those in Italy have gradually become more appealing to Indian students.

The lower appeal of the US to Indian students compared to 2019 indicates a diversification of interest across destinations.

Volume of absolute Indian undergraduate interest **by top study destinations, 2019-2023**



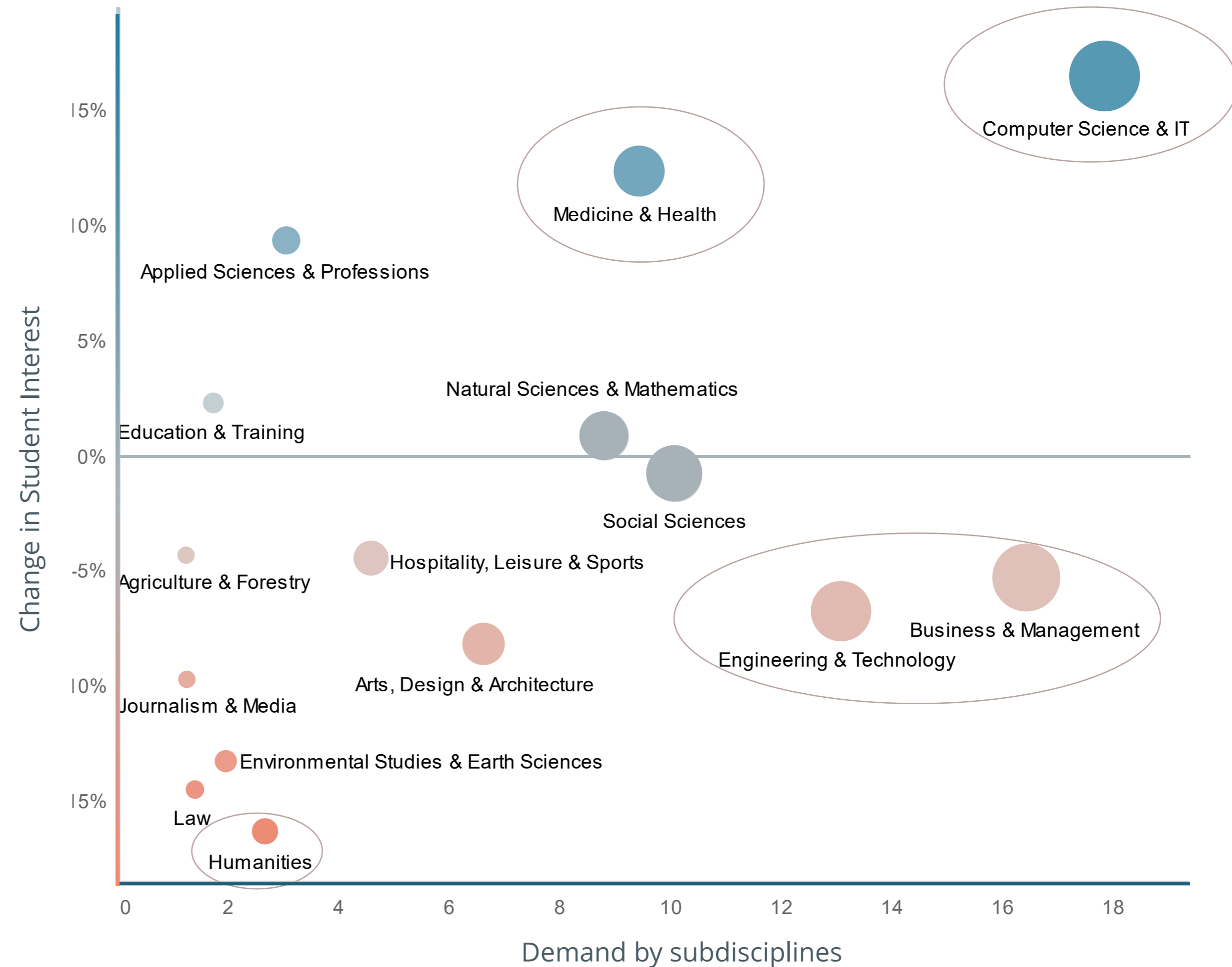


# Indian interest on the rise for Computer Science and Medicine

Based on the share of total interest towards Studyportals' disciplines, there has been a growth in Indian student interest for undergraduate programmes in Medicine & Health and Computer Science & IT over the last 24 months.

As a result of this growth, interest for undergraduate programmes in the Humanities fell, while Engineering & Technology and Business & Management also witnessed a slight drop despite the high volume of interest they attract.

Change in Indian student interest for disciplines (last 12 vs last 24 months)





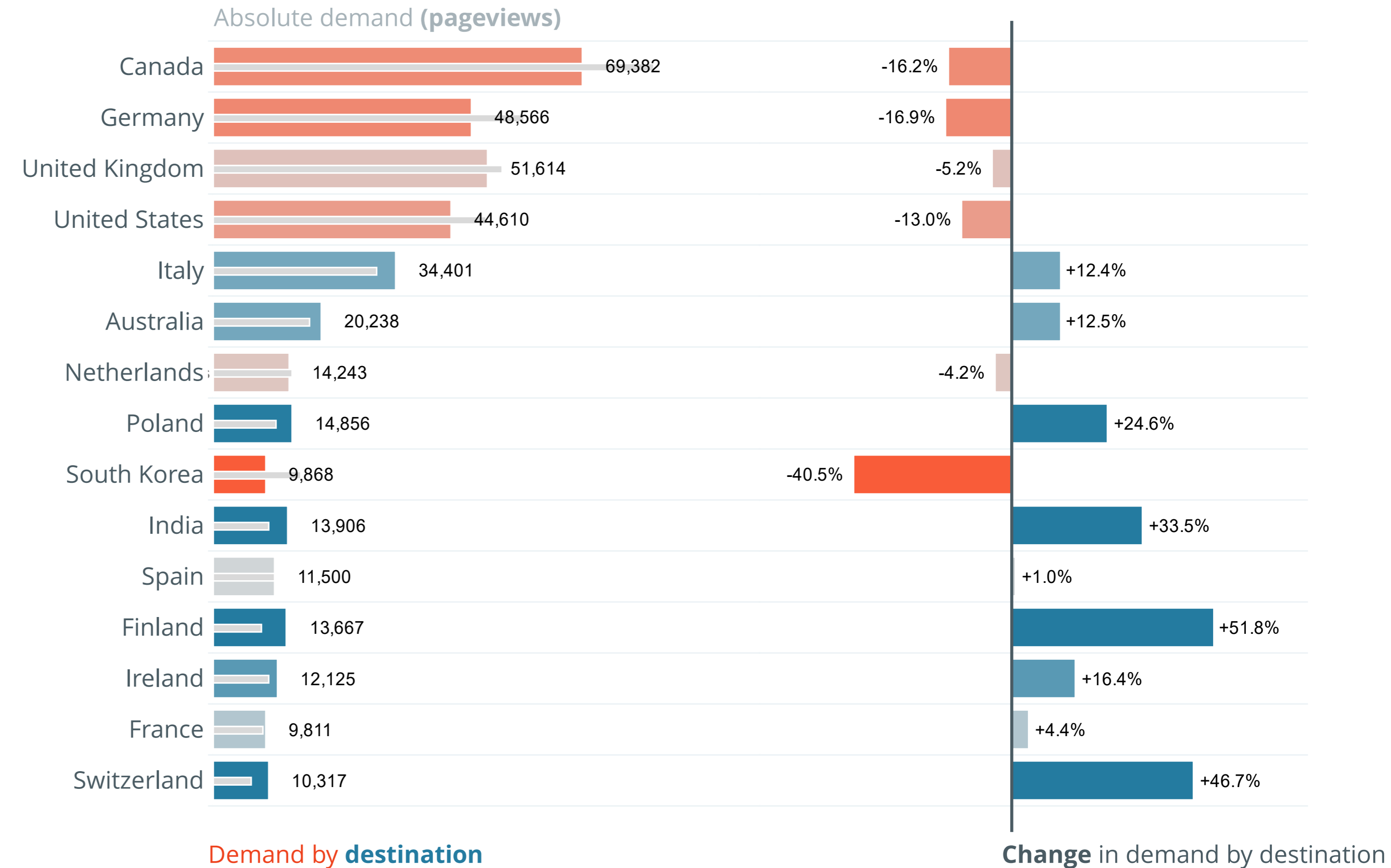
# Indian students **diversify** their study abroad **options**

Looking beyond the top-10 study destinations, various countries saw growth in Indian student traffic to study abroad over the last 24 months.

This is certainly the case in Finland, Switzerland, India, and Poland. Moreover, Australia and Italy saw a similar increase in absolute interest.

Meanwhile, traditional destinations like Canada and the US have lost popularity as destinations for undergraduate programmes.

Volume of absolute Indian interest by **top 15 destinations** (last 12 vs last 24 months)

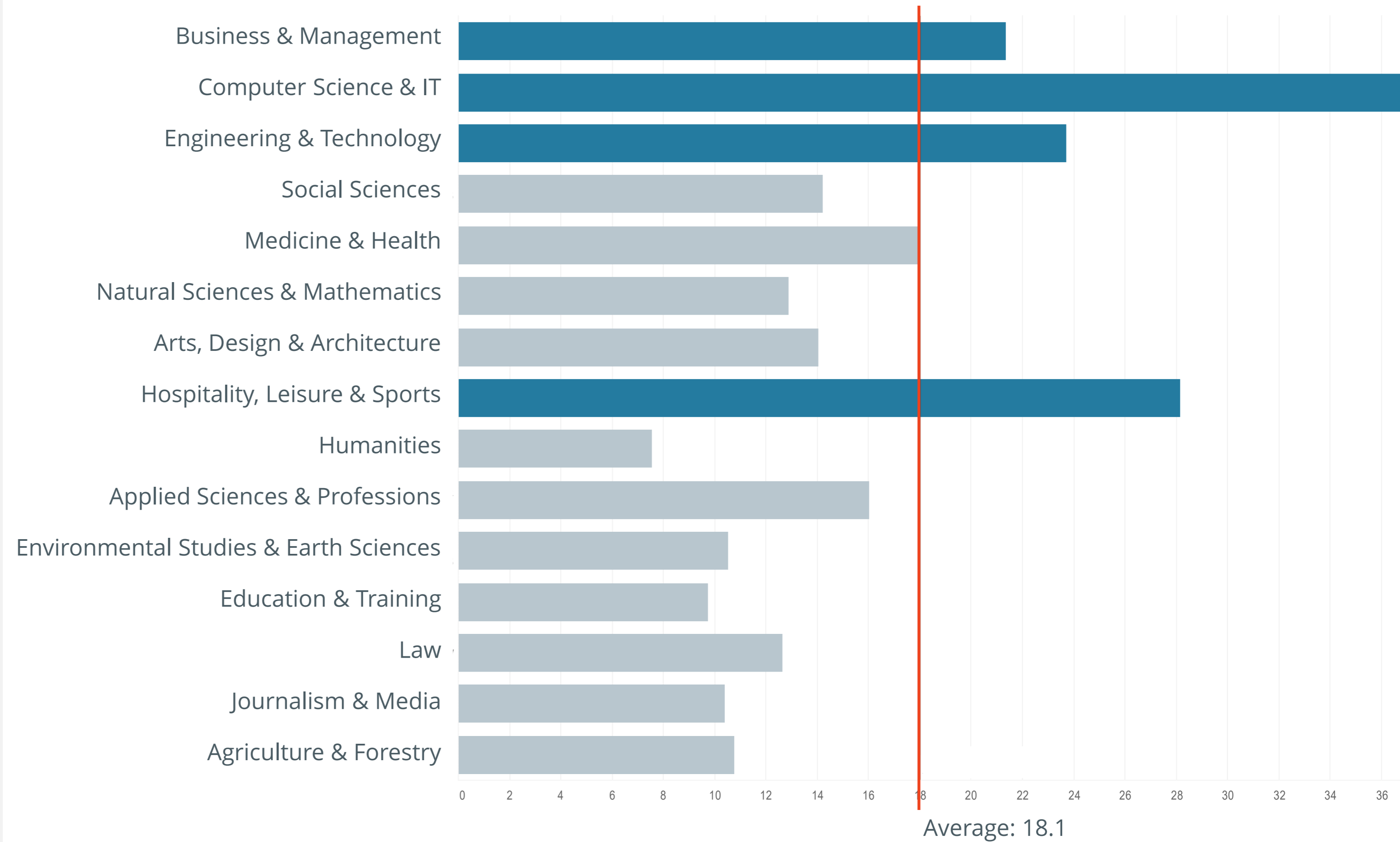


# Undergraduate interest in **top disciplines**

Considering pageviews per programme, interest from prospective Indian students is above average for undergraduate degrees in Computer Science & IT, Hospitality, Leisure & Sports, Engineering & Technology, Business & Management, and Medicine & Health.

Meanwhile, there are various disciplines that receive below average interest from Indian students, such as the Humanities, Education & Training, and Journalism & Media.

## Pageviews **per programme** for disciplines



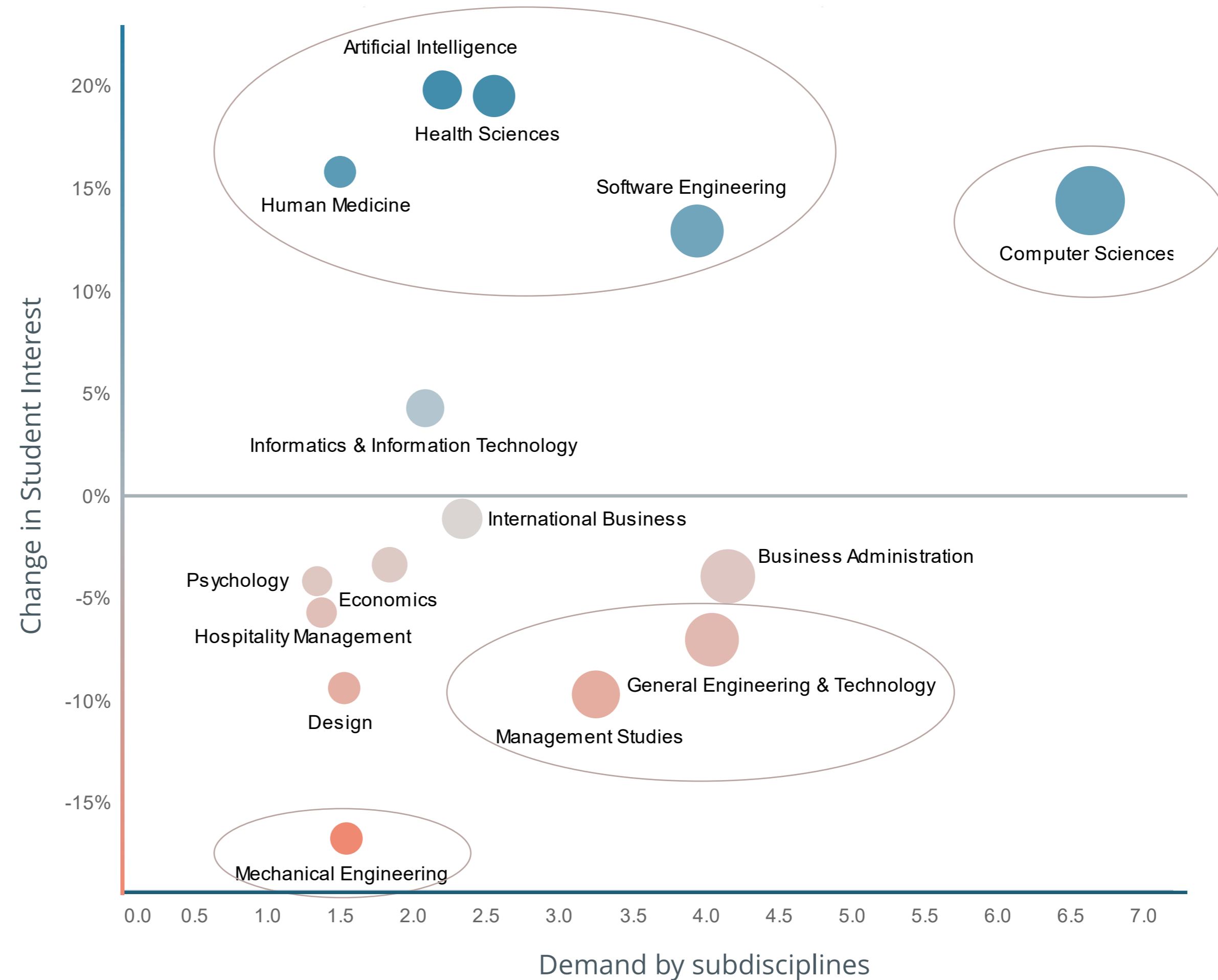


# Interest in undergraduate **subdisciplines** abroad

Studyportals defines each programme listed on our portals by one discipline and up to three subdisciplines. You can think of disciplines as more general study areas and sub-disciplines as specific programmes within these study areas.

At a subdiscipline level, Indian interest grew towards undergraduate programmes related to Artificial Intelligence, Health Sciences, Human Medicine, Software Engineering, and Computer Sciences. In contrast to this, interest in undergraduate degrees related to Mechanical Engineering, Management Studies, and General Engineering fell in the last 24 months.

**Change** in Indian student **interest** for subdisciplines (last 12 vs last 24 months)





Part Two

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# Analysis of Indian interest to study abroad

## b. Trends for Master's programmes



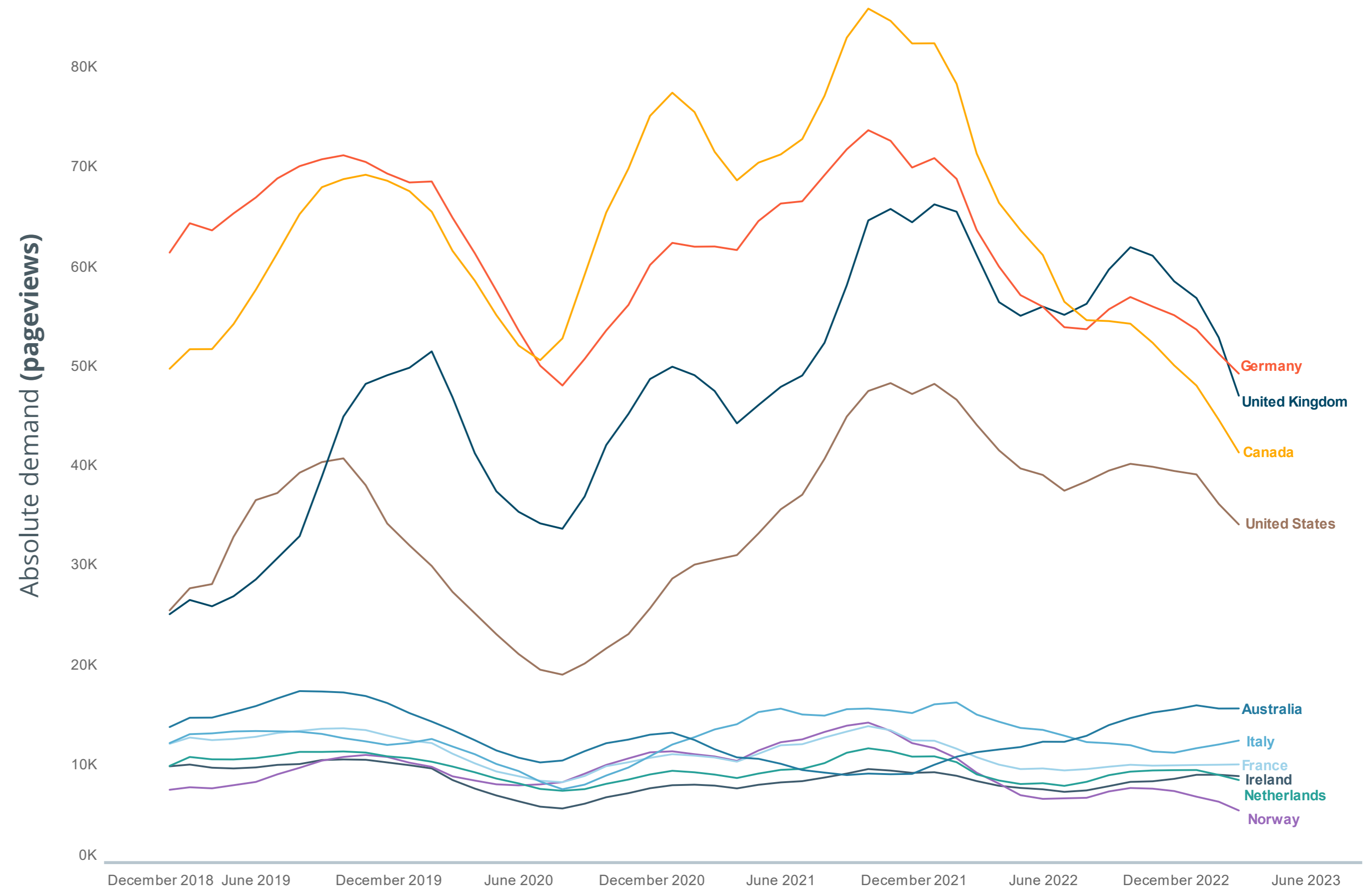
# Pent up demand to study abroad returns to normal

Although Canada, the UK, the US, and Germany saw a rise in student interest around late 2020, likely due to COVID, this trend appears to have peaked by early 2022.

Moreover, each destination has also witnessed a further downtrend in Indian student interest.

It is worth noting that there is a wider gap between competing study destinations compared to undergraduate programmes.

Volume of absolute Indian interest by top study destinations, 2019-2023



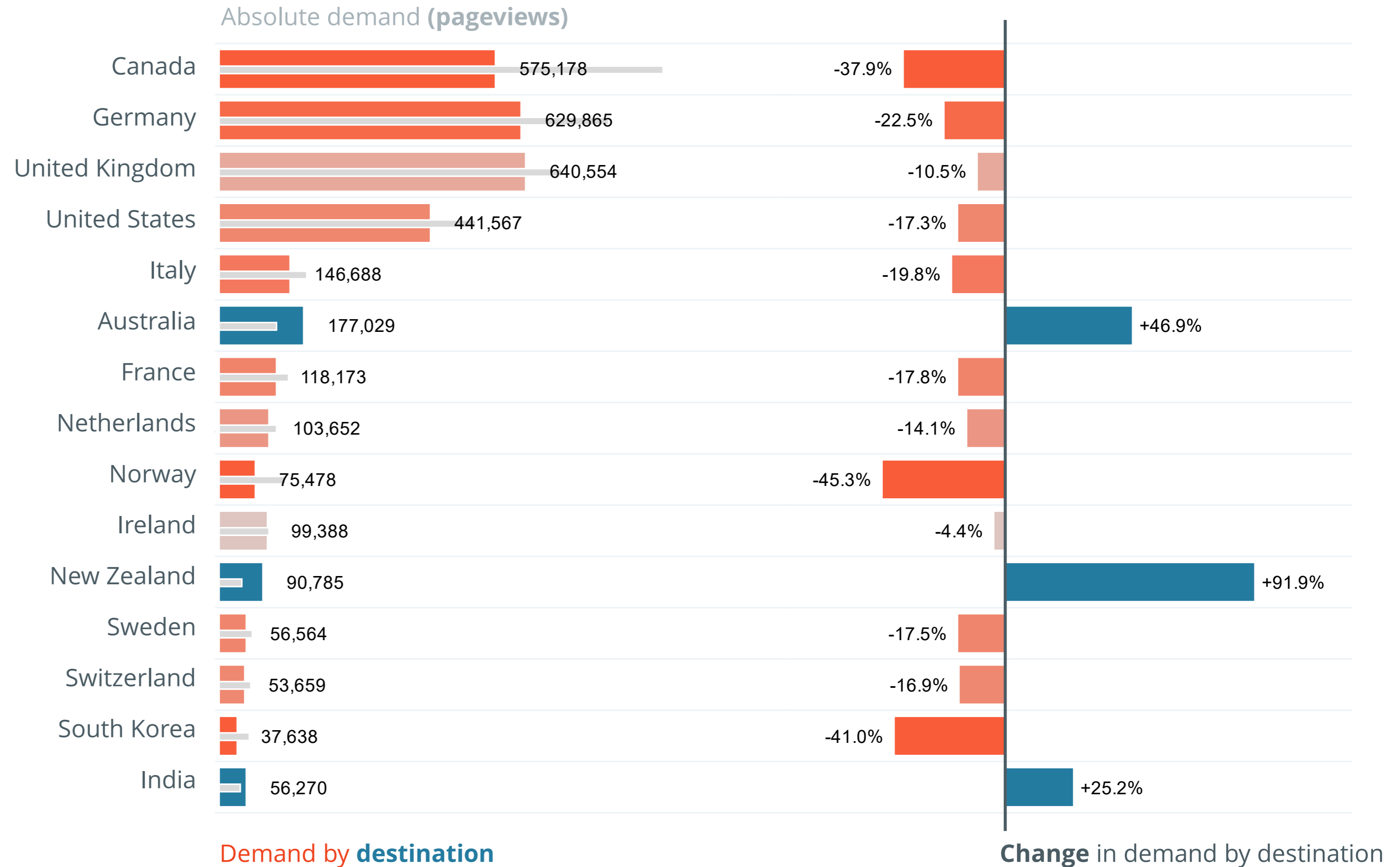
# Indian interest declines across various destinations

Compared to the last 24 months, Indian student interest to study postgraduate programmes abroad fell across various destinations in the past 12 months.

In particular, Norway, South Korea, Canada, and Germany witnessed large drops in Indian interest.

Standing out against the rest, the Oceania region experienced significant growth in Indian interest, alongside India itself.

Volume of absolute **Indian interest** for top-15 destinations (last 12 vs last 24 months)



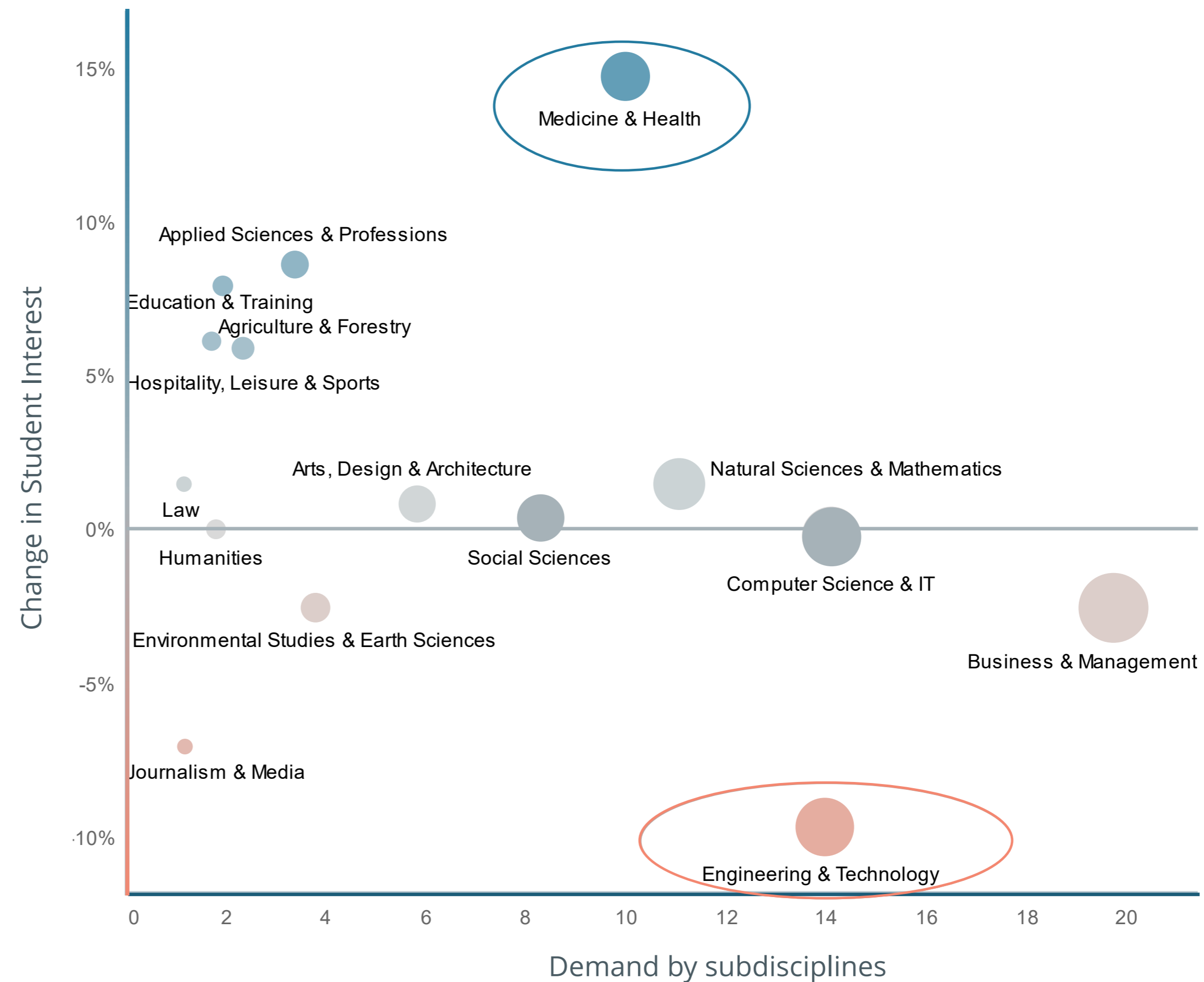


# As Indian **interest** for **Medicine** rose, interest for **Engineering** fell

According to the total share of Indian interest towards different disciplines, there was an increase in Indian student interest to pursue postgraduate programmes in Medicine & Health, alongside other disciplines.

Indian interest to study postgraduate programmes in Engineering & Technology declined in the same period.

Change of Indian student interest for disciplines (last 12 months vs. last 24 months)



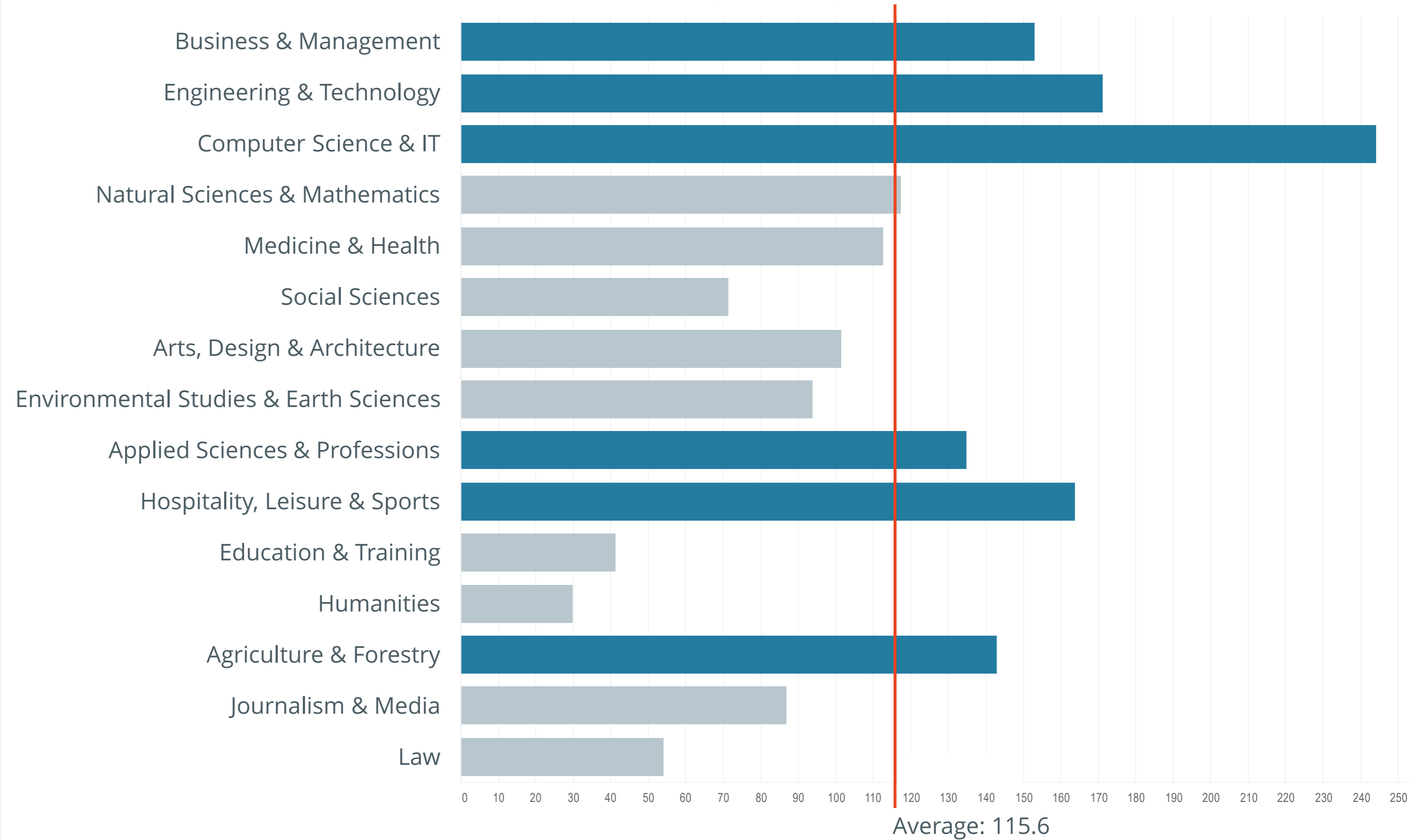
# Postgraduate Interest in **top disciplines**

Although Indian interest for postgraduate programmes in Computer Science & IT remained stable, and interest in Engineering fell, these disciplines remain popular for Indian students when considering pageviews per programme.

Other promising disciplines at this level include Hospitality, Leisure & Sports, Business & Management, Agriculture & Forestry, and Applied Sciences & Professions.

Programmes in both the Humanities and Education & Training underperformed compared to other disciplines.

Pageviews **per programme** for disciplines

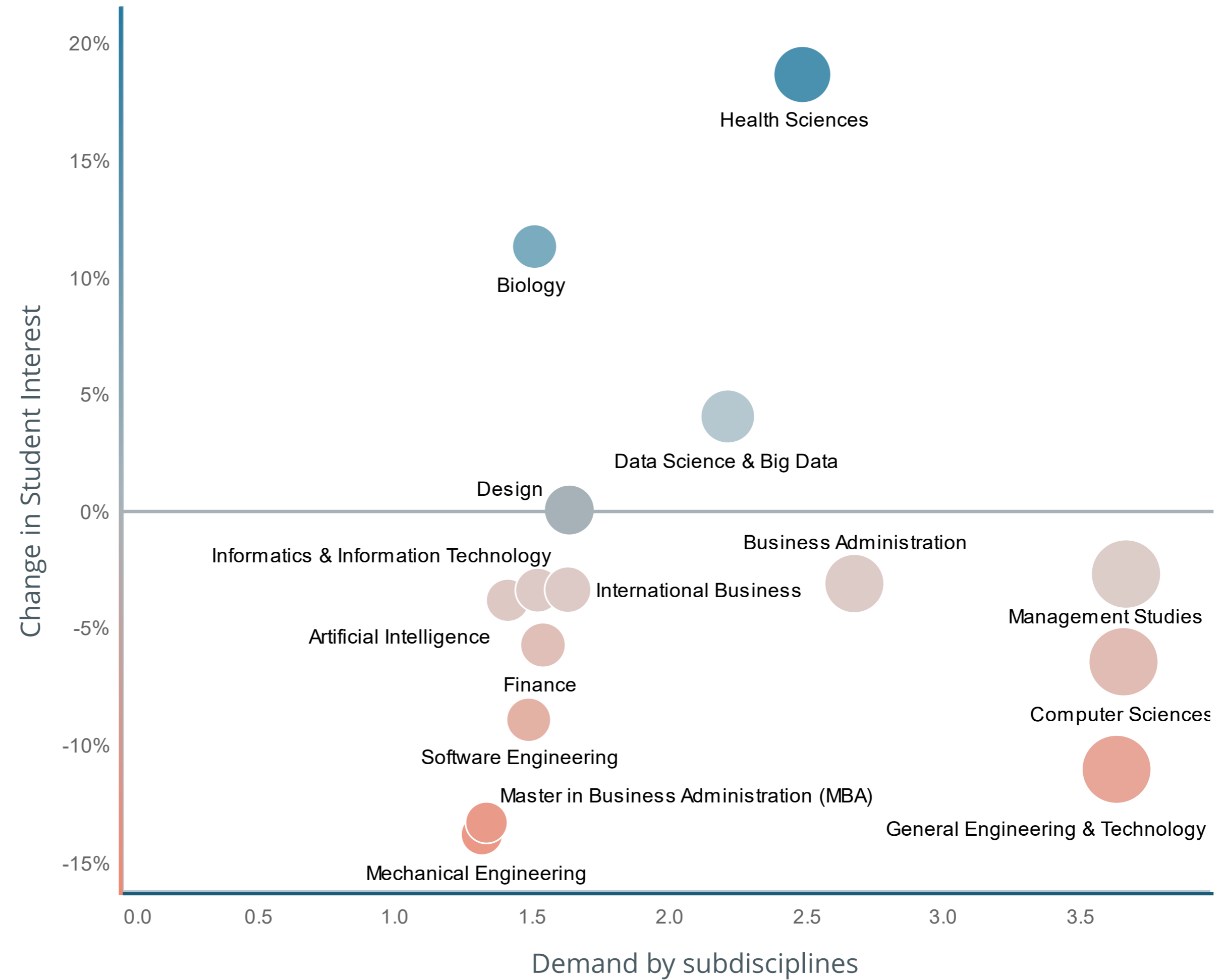


# Interest in postgraduate **subdisciplines** abroad

In terms of subdisciplines, Indian interest grew the most for postgraduate programmes related to Health Sciences and Biology.

Meanwhile, in the last 24 months, interest instead fell for postgraduate programmes related to Mechanical Engineering, MBA, General Engineering, Software Engineering, Computer Sciences, amongst others.

**Change** in Indian student **interest** for subdisciplines (last 12 months vs. 24 months)







Part Two

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# Analysis of Indian interest to study abroad

## c. Deep-dive into Indian cities

# Indian city traffic to study undergraduate programmes abroad

Revealing Indian cities that indicate a large interest to study undergraduate programmes abroad, Delhi generates the most interest, alongside Mumbai at number 2.

Other cities that ought to be explored further for potential opportunities include Ludhiana, Jaipur, Lucknow, Thrissur, and Chandigarh.

City	Pageviews	Rank
Delhi	62,782	1
Mumbai	38,676	2
Kochi	28,127	3
Bengaluru	24,442	4
Hyderabad	24,221	5
Ahmedabad	24,198	6
Chennai	22,574	7
Ludhiana	16,275	8
Kolkata	14,833	9
Pune	14,420	10
Surat	13,172	11
Jaipur	11,973	12
Chandigarh	10,632	13
Lucknow	9,507	14
Thrissur	8,193	15
Patna	7,706	16
Ernakulam	5,036	17
Coimbatore	4,745	18
Indore	4,693	19
Trivandrum	4,140	20

**Note:** On-campus programmes only, undergraduate, above 1,000 pageviews, last 12 months.

# Indian city traffic to study postgraduate programmes abroad

Revealing Indian cities that indicate a large interest to study postgraduate programmes abroad, Delhi generates the most interest, alongside Mumbai in the top-3.

Other cities that ought to be explored further for potential opportunities are once again Ludhiana, Jaipur, Lucknow, Thrissur, and Chandigarh.

City	Pageviews	Rank
Delhi	374,547	1
Hyderabad	361,884	2
Mumbai	357,324	3
Bengaluru	317,904	4
Chennai	279,602	5
Kochi	203,646	6
Ahmedabad	177,584	7
Pune	154,589	8
Kolkata	91,410	9
Surat	79,106	10
Ludhiana	74,289	11
Jaipur	58,332	12
Lucknow	54,561	13
Thrissur	52,602	14
Chandigarh	52,235	15
Coimbatore	48,887	16
Ernakulam	37,692	17
Trivandrum	36,630	18
Indore	35,922	19
Patna	33,380	20

**Note:** On-campus programmes only, postgraduate, above 1,000 pageviews, last 12 months.

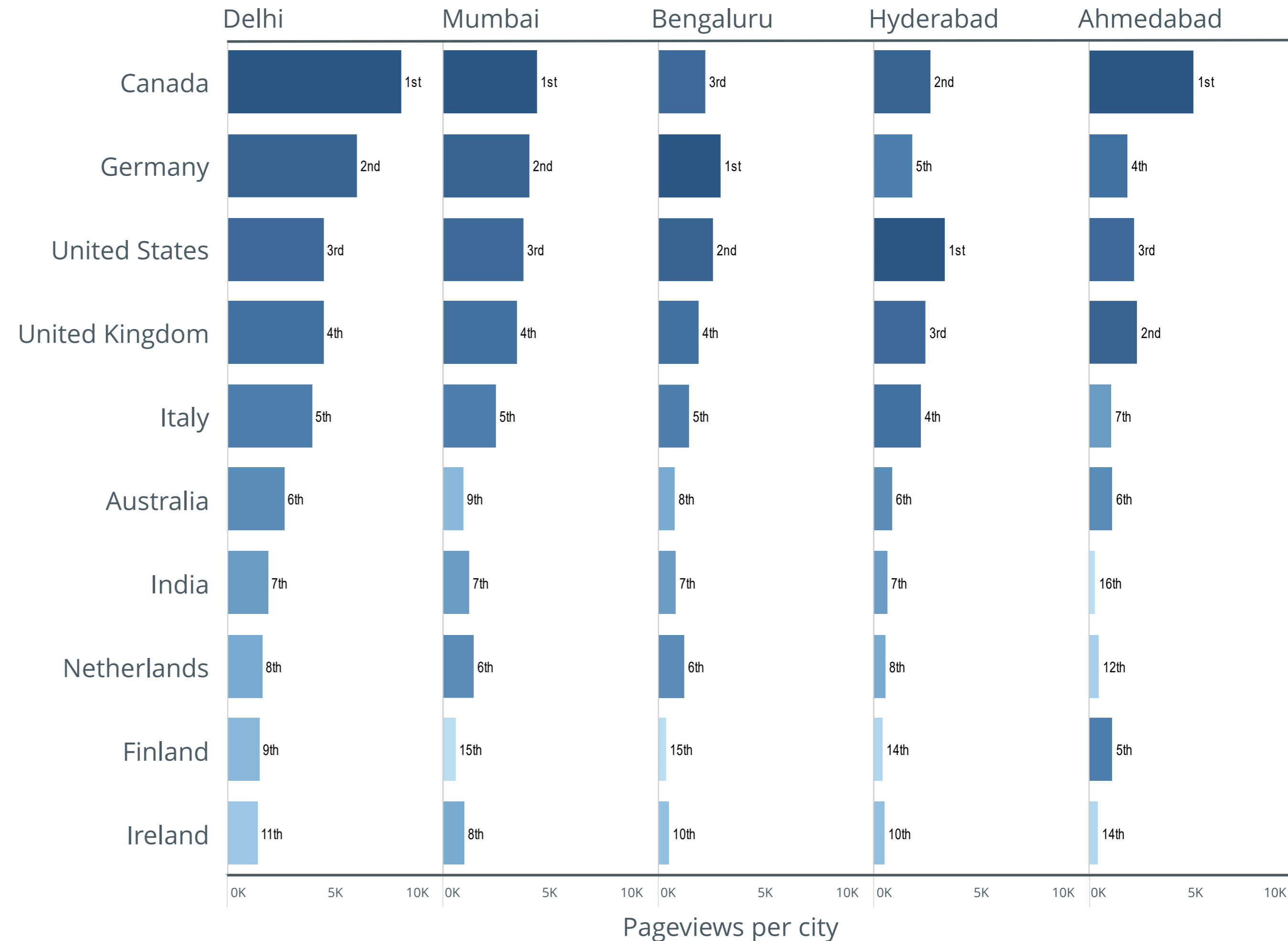


## Top study destinations per Indian city slightly differ

Indian students from high-potential cities seek diverse study destinations for undergraduate programmes.

For instance, while Canada, Germany, and the US are the preferred choices for students in Delhi and Mumbai, the UK ranks 2nd in popularity for Hyderabad and Ahmedabad, and 3rd for Bengaluru.

Additionally, Italy appears in the top 5 choices for most cities, except for Ahmedabad.

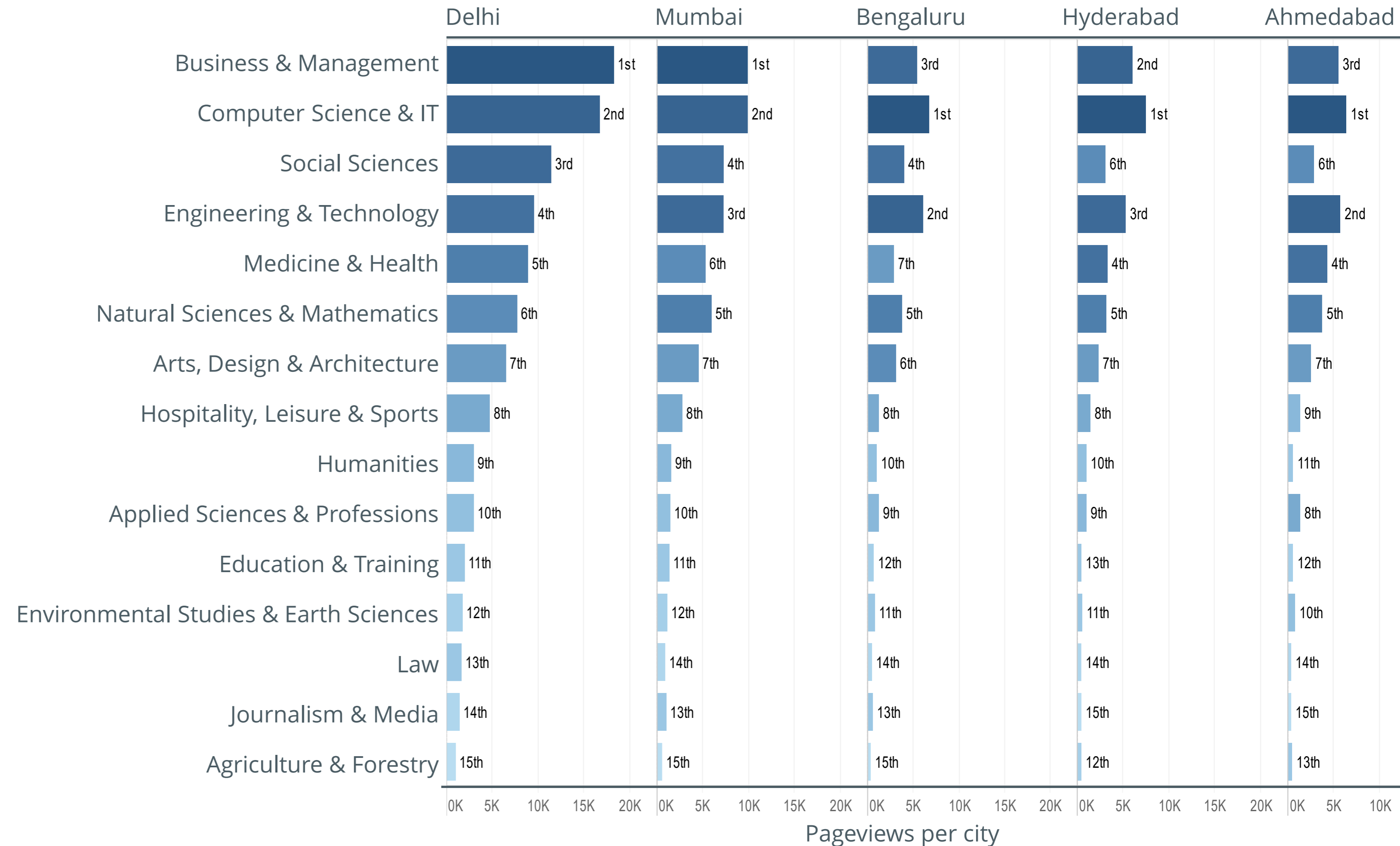


**Note:** Volume of absolute student interest across the observed cities for on-campus undergraduate programmes, last 12 months.

# Undergraduate disciplines by city

Regarding discipline preference, an undergraduate programme in Business & Management or Computer Science & IT are popular choices for students in Delhi, Mumbai, and Hyderabad.

Meanwhile, students in Bengaluru and Ahmedabad also prefer undergraduate programmes in Computer Science & IT but are also interested in Engineering & Technology.



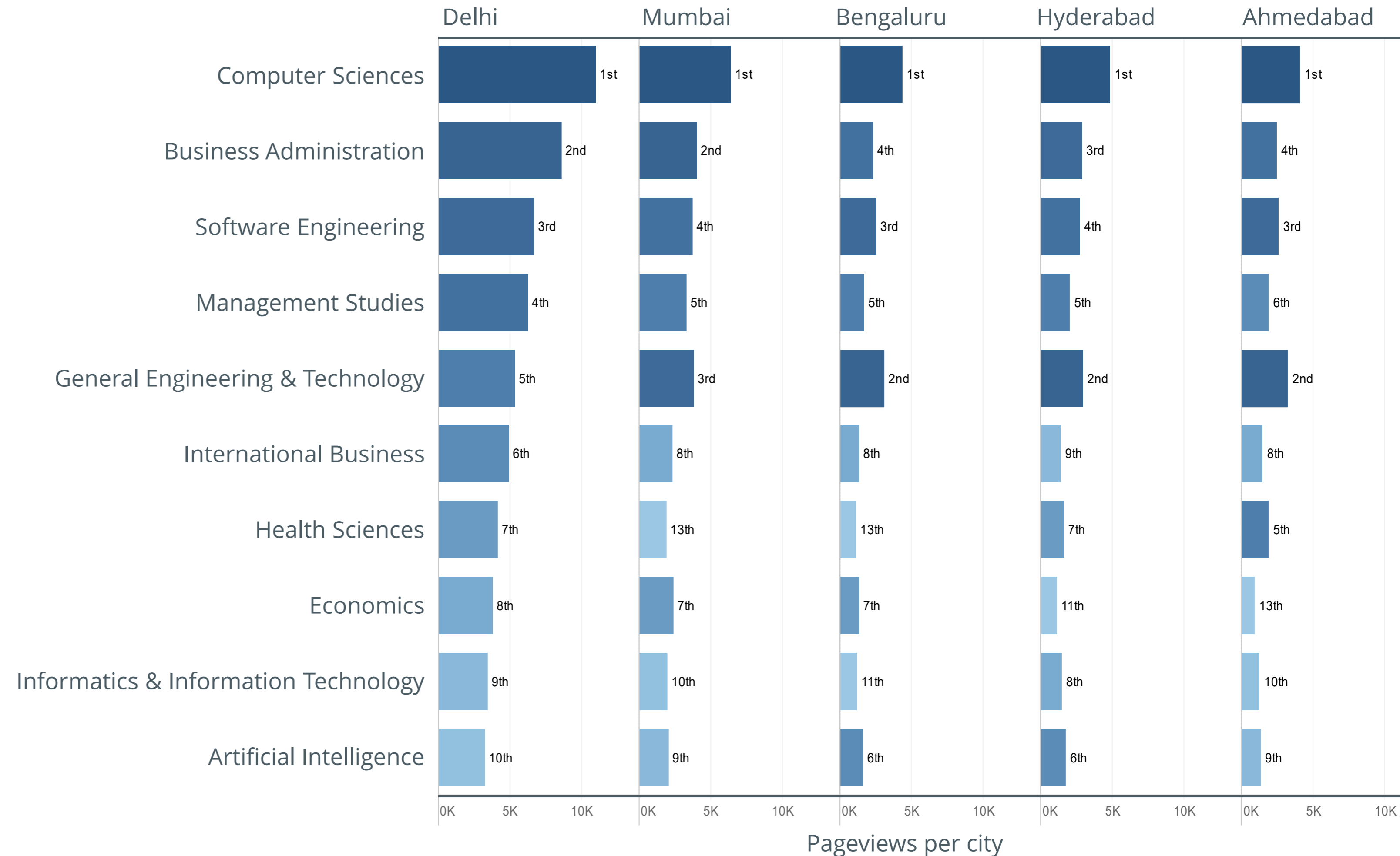
**Note:** Volume of absolute student interest across the observed cities for discipline programmes offered on-campus at an undergraduate level, last 12 months.

# Undergraduate subdisciplines by city

Drilling down to subdisciplines, an undergraduate programme related to Computer Sciences is certainly the top choice across each city.

However, while Business Administration is the 2nd choice for students in Delhi and Mumbai, those in other cities prefer General Engineering & Technology.

Management Studies and Software Engineering are other popular subdisciplines across the observed cities.



**Note:** Volume of absolute student interest across the observed cities for subdiscipline programmes offered on-campus at an undergraduate level, last 12 months.

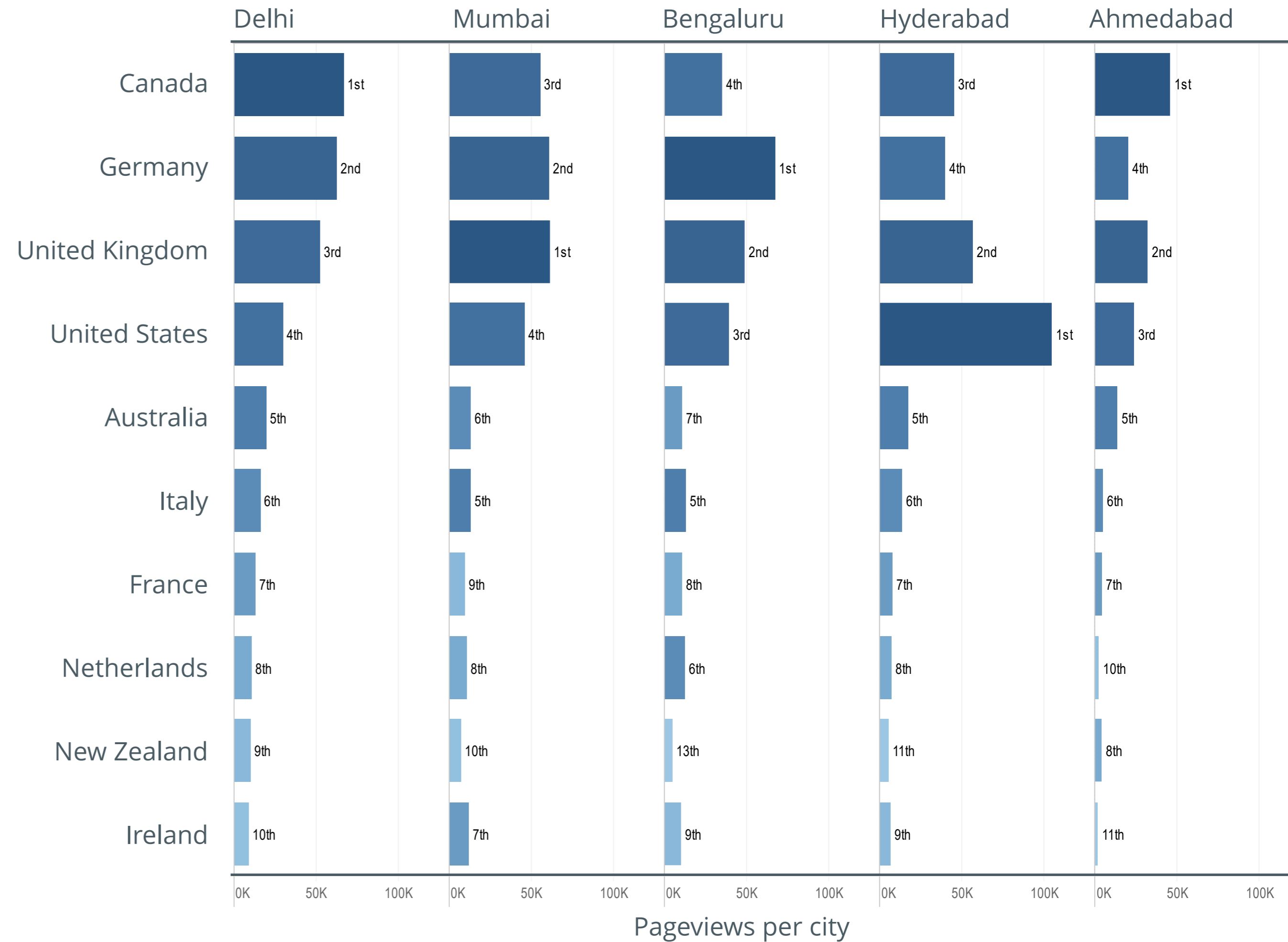


# Similar destinations reflected for postgraduate study options

At a postgraduate level, there similarly exists some variation between the observed cities.

Whereas Canada, Germany, and the UK are among the top-3 for Delhi and Mumbai, students in Hyderabad and Ahmedabad have different preferences for postgraduate degrees.

It is worth noting that Italy and Australia tightly compete to be in the top 5 for the observed cities.



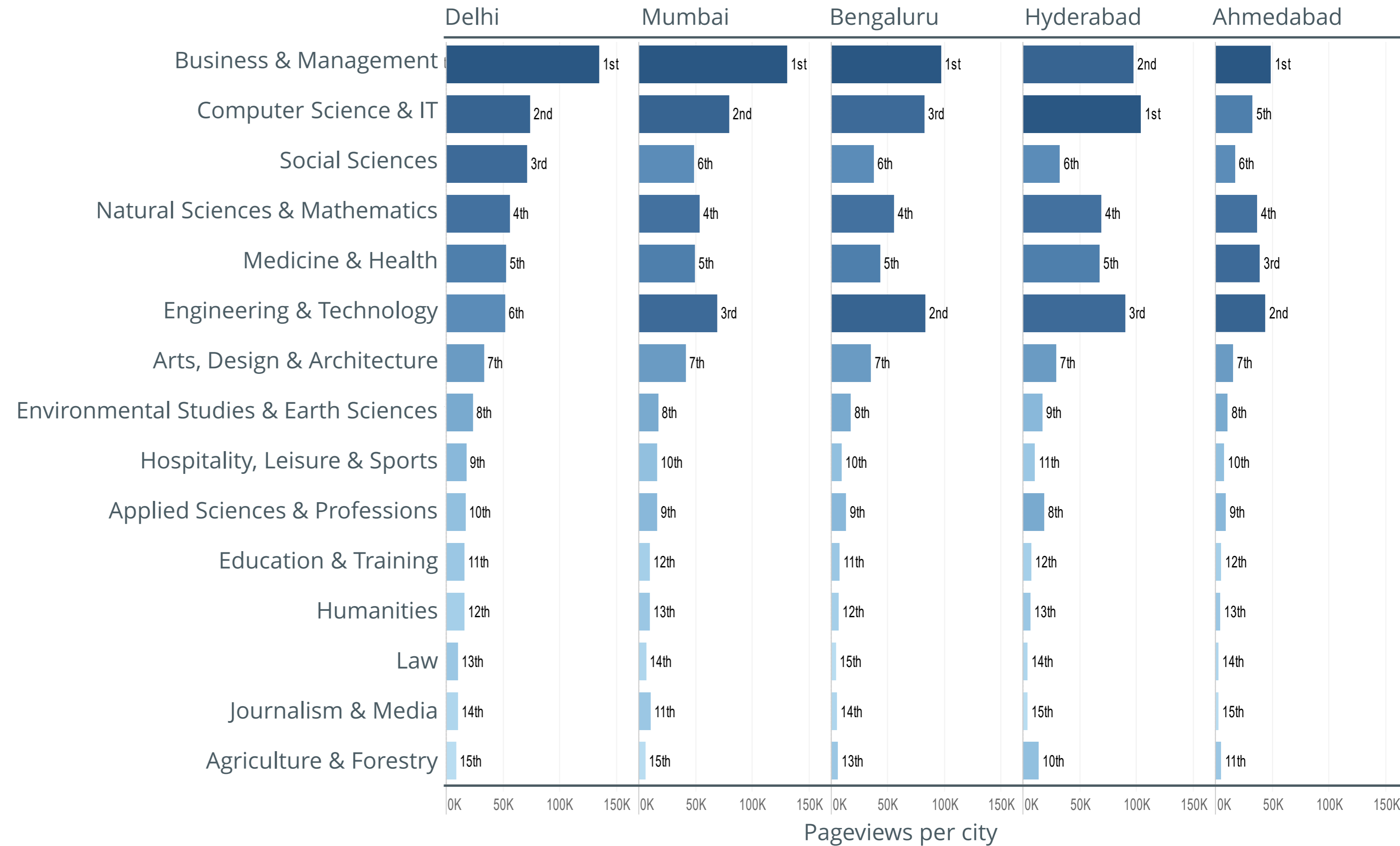
**Note:** Volume of absolute student interest across the observed cities for on-campus postgraduate programmes, last 12 months.

# Postgraduate disciplines by city

Concerning disciplines, a postgraduate in Business & Management or Computer Science & IT are again preferred choices for students in Delhi, Mumbai, and Hyderabad.

Prospective students from Bengaluru and Ahmedabad are interested in Business & Management and Engineering & Technology.

Once again, Social Sciences, Medicine & Health, and Natural Sciences & Mathematics are other appealing areas of interest.



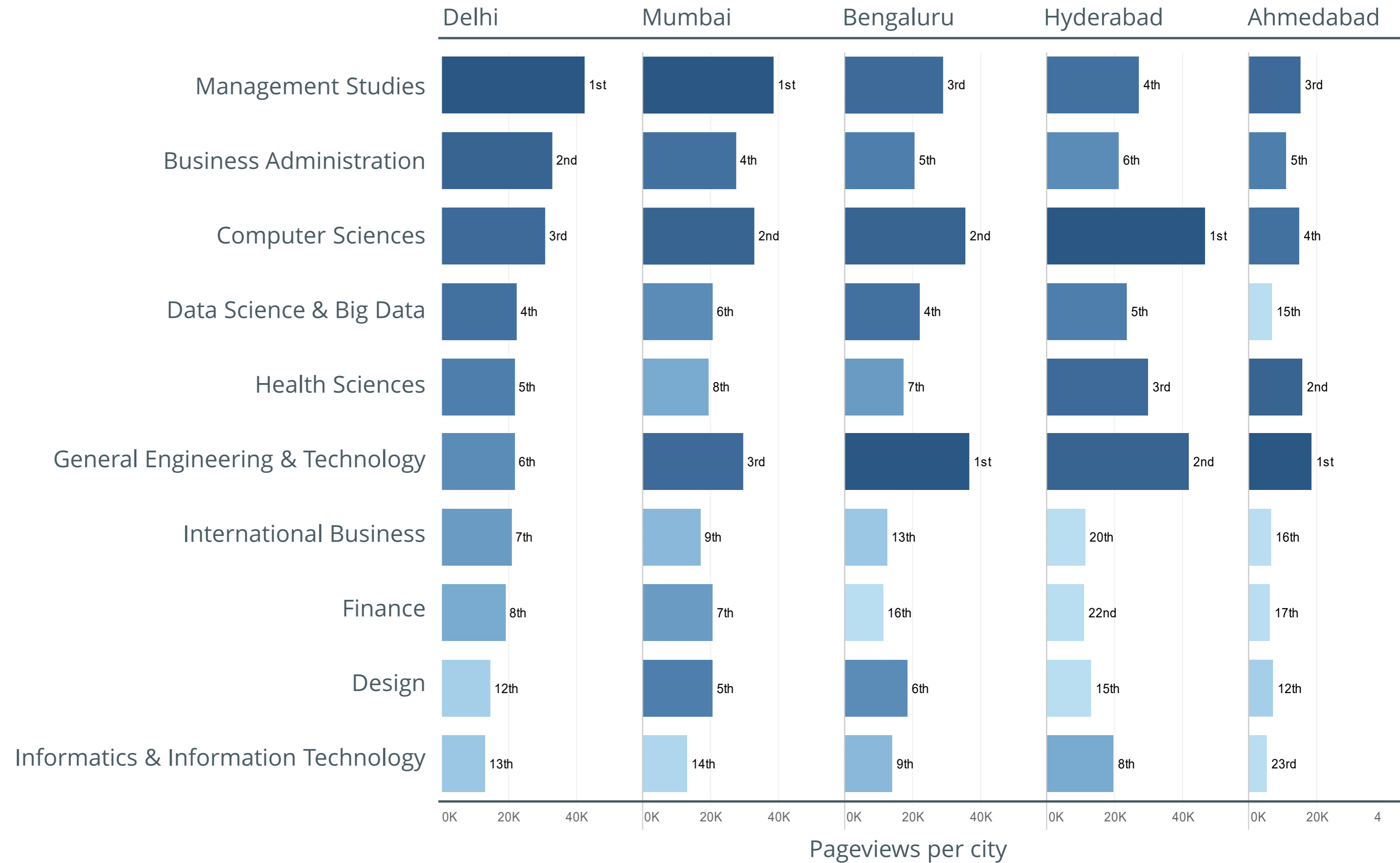
**Note:** Volume of absolute student interest across the observed cities for discipline programmes offered on-campus at a postgraduate level, last 12 months.

# Postgraduate subdiscipline fields by city

Students in each city have distinct postgraduate preferences. Delhi and Mumbai favor Management Studies, with Delhi also leaning towards Business Administration and Mumbai towards Computer Sciences.

In contrast, Bengaluru and Ahmedabad prefer General Engineering & Technology, while Hyderabad favors Computer Sciences.

Data Science & Big Data and Health Sciences are also promising choices for postgraduate studies.



**Note:** Volume of absolute student interest across the observed cities for discipline programmes offered on-campus at a postgraduate level, last 12 months.





Part Three

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# Indian student mobility to the UK

# Indian students in **UK universities**

2021/22 was a breakthrough year in terms of overall Indian students studying at UK universities. Data from inbound enrolments from India in UK universities, as well as those **registering through TNE forms of delivery, show dramatic growth**, and position **India as arguably the most important market** for UK university international recruitment.

The introduction of the Graduate Route visa in the UK, allowing students to work for up to 2 years at any without salary level limitations has been cited as a key reason for this accelerating growth. However, the UK government in May 2023 decided to **restrict international students** from bringing family members with them, which could adversely impact postgraduate student enrolments. Recruitment from India has been particularly driven by **postgraduate students**, so this is an area of concern for UK universities that have seen large and sudden rises in recruitment from that market.

Beyond this, other reasons for the **increasing enrolments from India include higher levels of disposable income and savings amongst Indian families**, enabling them to **afford higher international student fees**. However, global economic crises impacting currencies and conversion rates may impact this, and furthermore there needs to be greater understanding of socio-economic circumstances in individual states and cities in India.

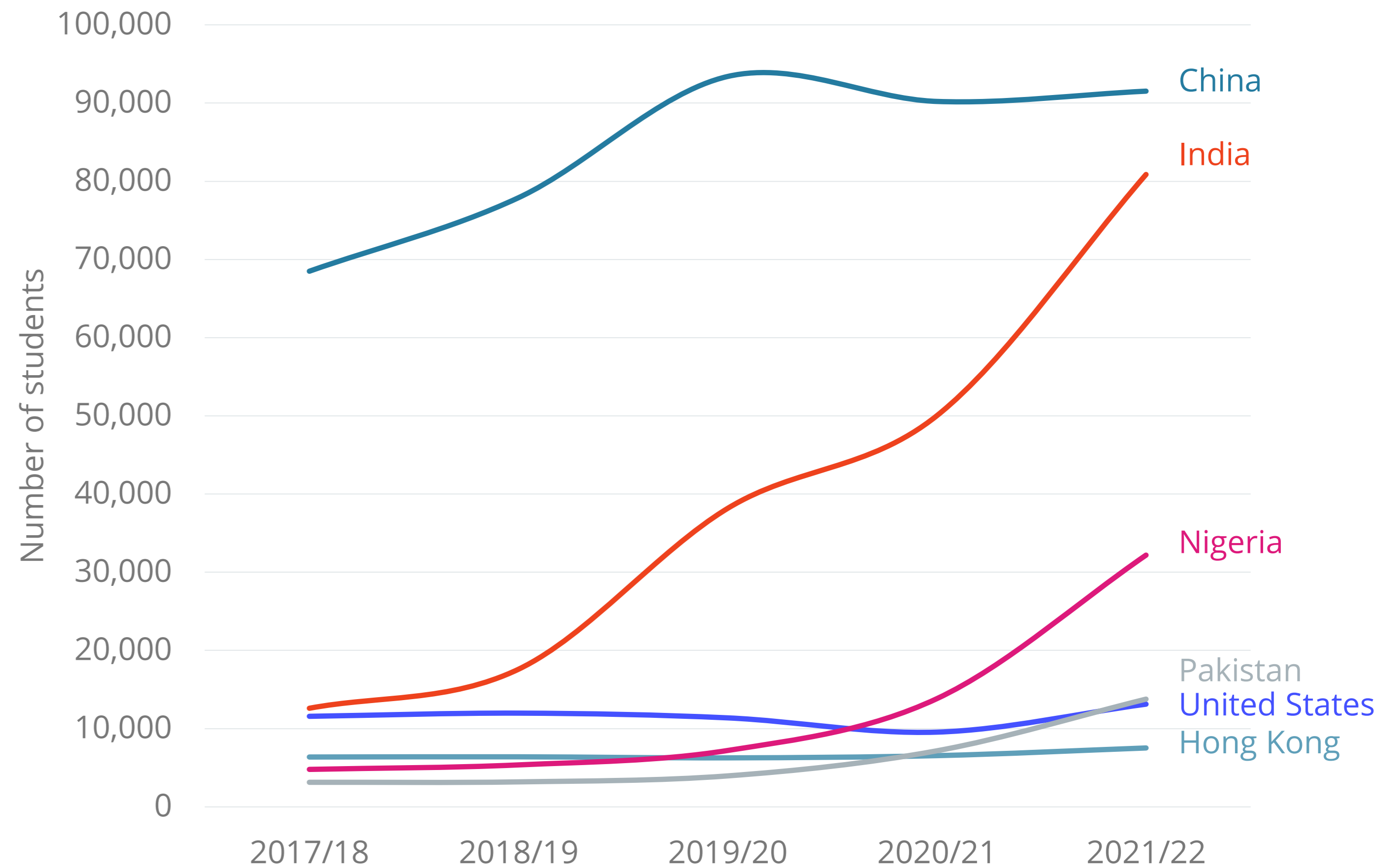
The following slides draw on data from HESA (The Higher Education Statistics Agency). All data in this section excludes data from London South Bank University, Falmouth University and University of Worcester due to HESA data usage agreements.

# The importance of Indian recruitment to the UK

This chart shows the top 5 recruitment markets for UK universities as they stood in 2017/18. In the last five academic years, India and Nigeria have experienced increases of 543% and 573% respectively.

Recruitment from Pakistan has increased by a significant 340%, but China, the United States and Hong Kong have had much lower rates of increase. Whilst Nigeria experienced the highest overall 5-year percentage increase, the substantial increase in real numbers from India mean that the China-India ratio has changed from 5.44:1 in 2017/18 to just 1.13:1 in 2021/22.

Top 5 student recruitment markets as of 2017/18



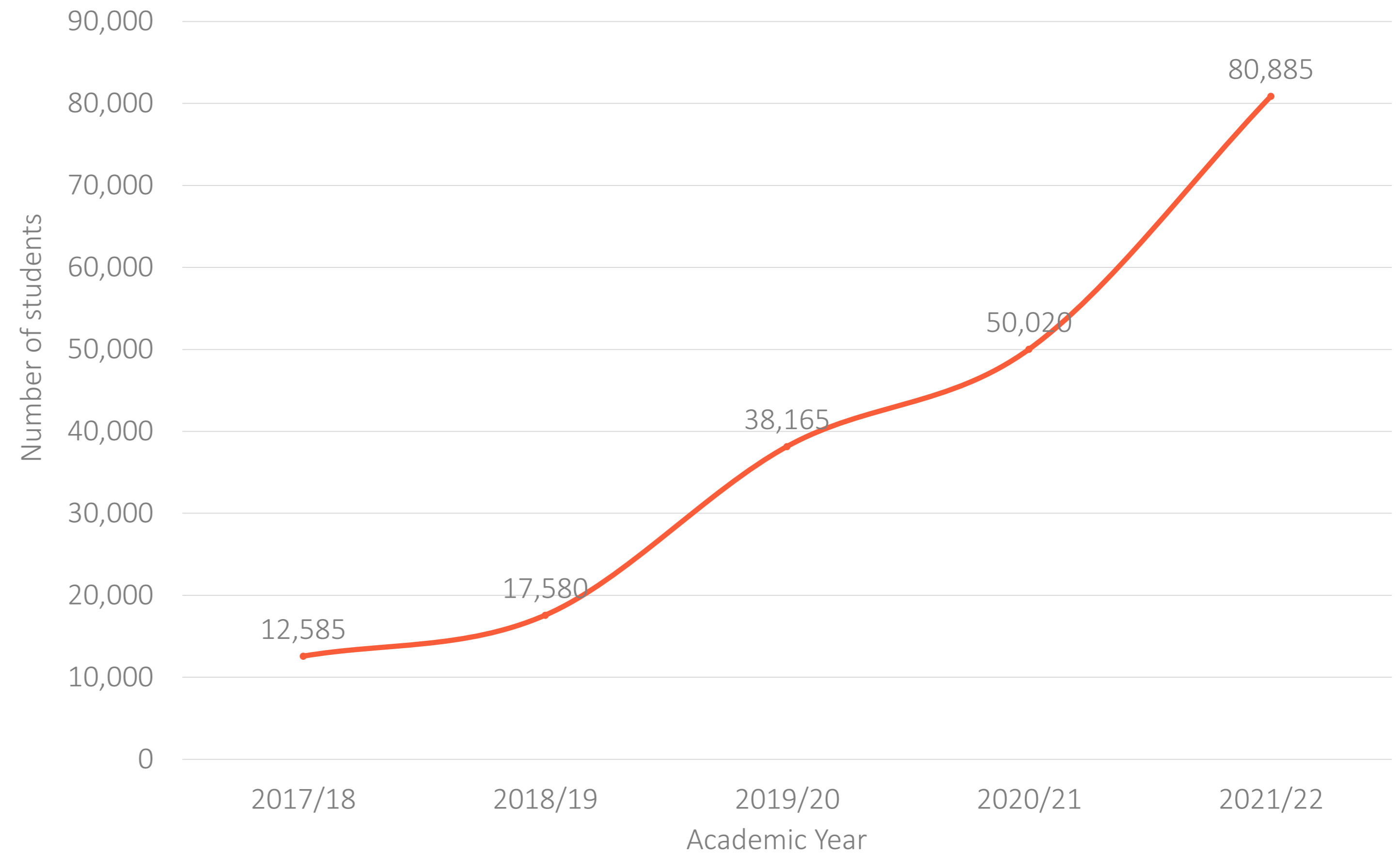
Source: HESA

# Indian student **mobility** to the **UK**

This section reviews the number of Indian students enrolling on degree programmes in the UK, using data from the UK Higher Education Statistics Authority (HESA). The figure here represents the number of new enrolments in each academic year.

As shown in the chart, there was a year-over-year increase of Indian students coming to study higher education in the UK, with a 61.7% increase between 2020/21 and 2021/22.

Indian students **studying** at UK universities



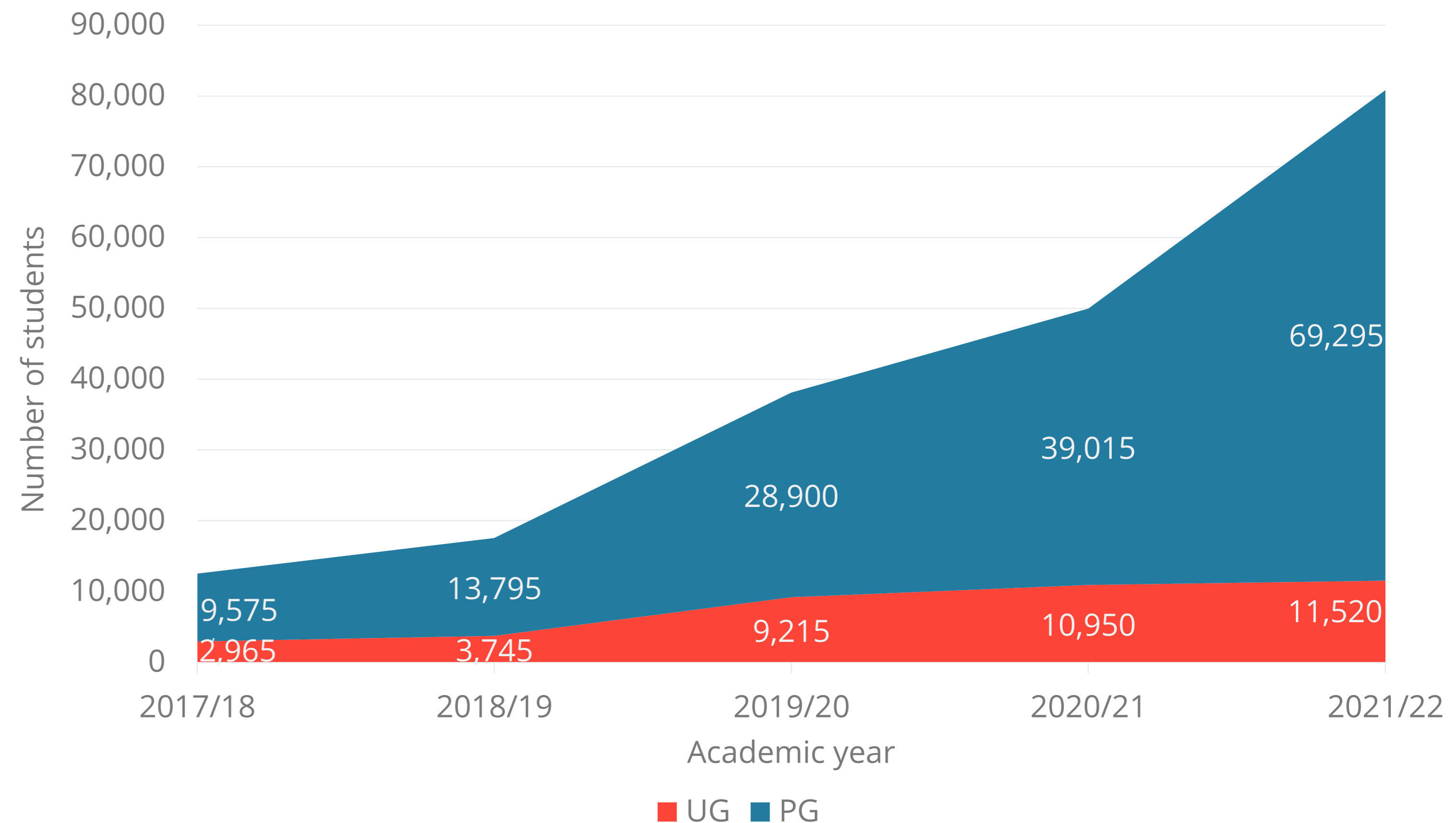
Source: HESA



# Undergraduate and postgraduate recruitment from India

The chart shows the growing dominance of postgraduate recruitment from India. The ratio of postgraduate to undergraduate students has increased from approximately 4:1 in 2017/18 to 8:1 in 2021/22.

In the last three academic years, there has been relative stability in the undergraduate student recruitment levels from India, indicating a slower rate of market capture of prospective Indian undergraduates, compared to that of prospective postgraduate students.



**Source:** HESA

**Note:** this graph excludes foundation degrees and HND

# Where are Indian students going to study in the UK?

As seen on the next slide, the distribution of Indian students in the UK, and the **change between 2017/18 and 2021/22**. Absolute numbers of Indian students have **increased in every UK region**, with universities in **London** experiencing the highest absolute growth from 3,660 students in 2017/2018 to 18,300 in 2021/22, a 400% rise. However, in terms of relative growth, **London** was actually the second 'slowest' of the UK regions after the **South East of England**. **Northern Ireland**, albeit starting from a much lower base of just 100 Indian students in 2017/18, witnessed a 3,635% increase by 2021/22, and the **East of England** experienced a **near tenfold leap** in Indian student recruitment, a rise of 976% from just 825 students in 2017/18, to 8,880 students in 2021/22.

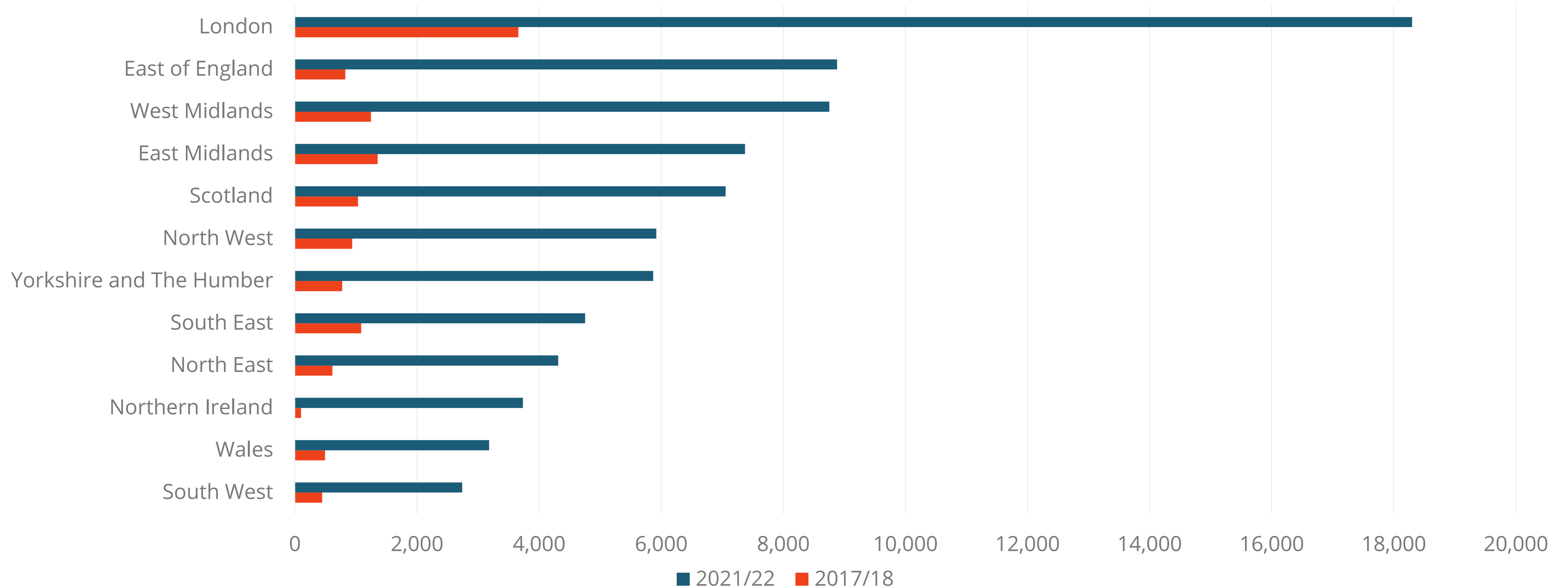
The relative share in the distribution of Indian students has also changed. In 2017/18, **London** accounted for 29.1% of all Indian students in the UK, but this **declined** to 22.6% in 2021/22. Nevertheless, in terms of share and absolute number, London remains the destination of choice for Indian students coming to the UK.

The **East of England** region has experienced the greatest positive change in terms of share of Indian students; in 2017/18 it was the 6th most popular region for Indian students with a 6.6% share. However, in 2021/22, **it was the 2nd most popular region** for Indian students with a 11% share. The **West Midlands** and **East Midlands** regions are the next most popular regions as of 2021/22, with the West Midlands experiencing a **slight increase** in its share (from 9.9 to 10.8%) and the East Midlands experienced a **slight decrease** (from 10.8 to 9.1).

Elsewhere, Scotland, Yorkshire, Humber and the North East of England regions all experienced a rise in their market share of Indian students in the UK between 2017/18. Although the **South East of England** experience an overall 338% increase in Indian students between 2017/18 and 2021/22, its overall market share declined from 8.6 to 5.9%. In some of the outlier regions for Indian student recruitment there was some significant market share changes, albeit with far lower absolute numbers. In particular, **Northern Ireland** overtook both **Wales** and the **South West of England** in terms of absolute numbers of Indian students and market share. Northern Ireland's market share for Indian students increased from 0.8 to 4.6% between 2017/18 to 2021/22, whereas the market share for Wales remained at 3.9%, and the South West at 3.5%.

# Where are Indian students going to study in the UK?

Indian students' university region in 2017/18 in comparison to 2021/22



Source: HESA

# What are Indian **undergraduate** students studying in the UK?

The chart on the next page shows **subjects with the highest number of undergraduate enrolments** of Indian students in the UK in 2021/22, as well as tracking the trend since 2017/18. It shows that the most popular undergraduate degrees for Indian students in the UK are in the **business and management** field. In 2019/20, enrolments in this area increased by 2,895 students – a rise of 247%. However, in each of the two academic years since, there were successive declines in the number of business and management undergraduates from India, albeit by a relatively small amount. Between 2020/21 and 2021/22, there was a – 3% decrease in the number of business and management undergraduate enrolments, in comparison to a 10% increase in the overall number of Indian undergraduate enrolments.

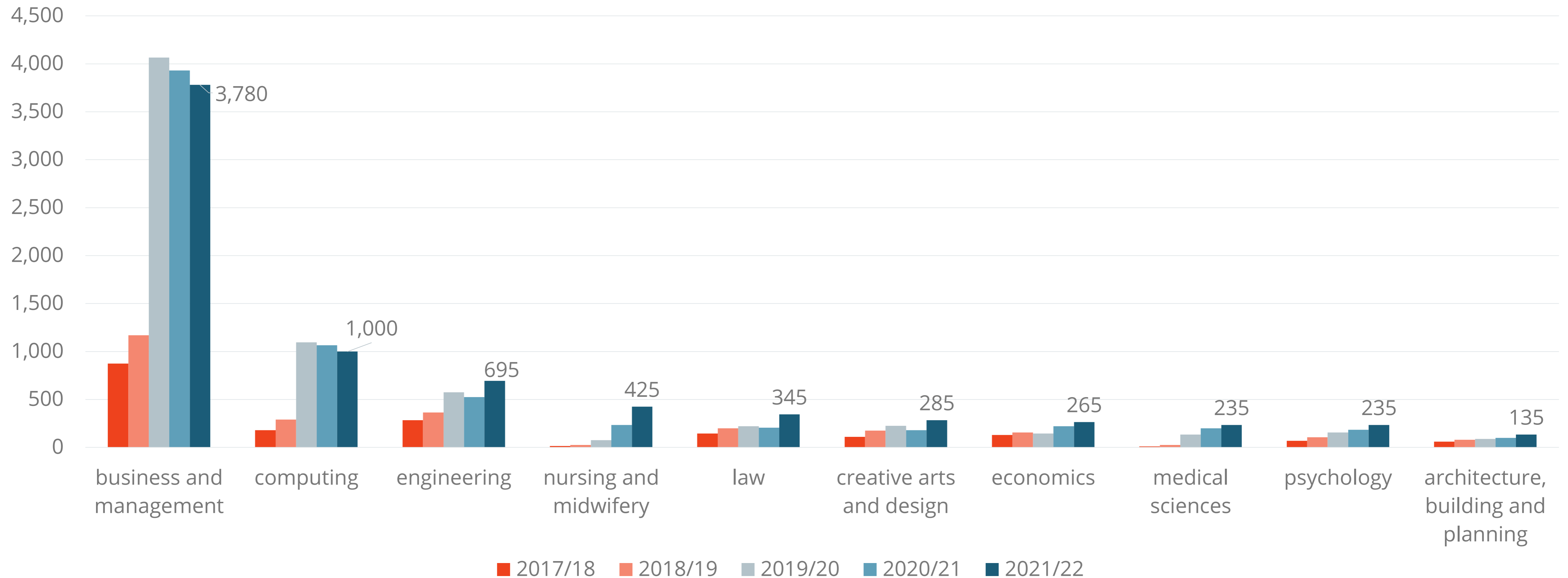
Outside of business and management degrees, which accounted for 44% of all undergraduate enrolments from India in 2021/22, degrees in **computing and engineering** are the next most popular. From a base of far lower actual enrolments, degrees in **nursing and midwifery** and **law** experienced relatively high increases in 2021/22 (81% and 68% respectively). Compared to five years ago, degrees in the **nursery and midwifery** and the **medical sciences** are now both in the top 10 undergraduate choices for Indian students in the UK, replacing degrees in **media, journalism and communications**, and **biosciences**.

It is also worth noting that aside from the '**First Degree**' category that is represented on the next page, there were a further 2,160 enrolments on nursing and midwifery programmes at universities in the 'other undergraduate degree' categories - far more than any other subject area.



# What Indian **undergraduate** students are studying in the UK

The most **popular subject areas** for Indian **undergraduate** students in the UK in 2021/22.



**Source:** HESA

**Note** that this figure contains data from the 'First degree' category and excludes data in the 'Foundation degree', 'HND' and 'Other undergraduate degree' categories

# What are Indian **postgraduate** students studying in the UK?

As seen on the next slide, the **subject areas with the highest number of postgraduate enrolments of Indian students in the UK in 2021/22**, as well as tracking their trend since 2017/18. Business and management, which represented 51% of all postgraduate enrolments from India in 2021/22, has been dominant over the last five years, with computing and engineering the next most popular fields.

**All the subject areas in the top-10** most popular for Indian postgraduate students in the UK have experienced significant relative and absolute growth in the last five years, with all of them increasing enrolments by over 400% between 2017/18 and 2021/22 apart from law. The fastest-growing subject areas in terms of relative growth in that period were **materials and technology** (2,019%) and **computing** (1,247%).

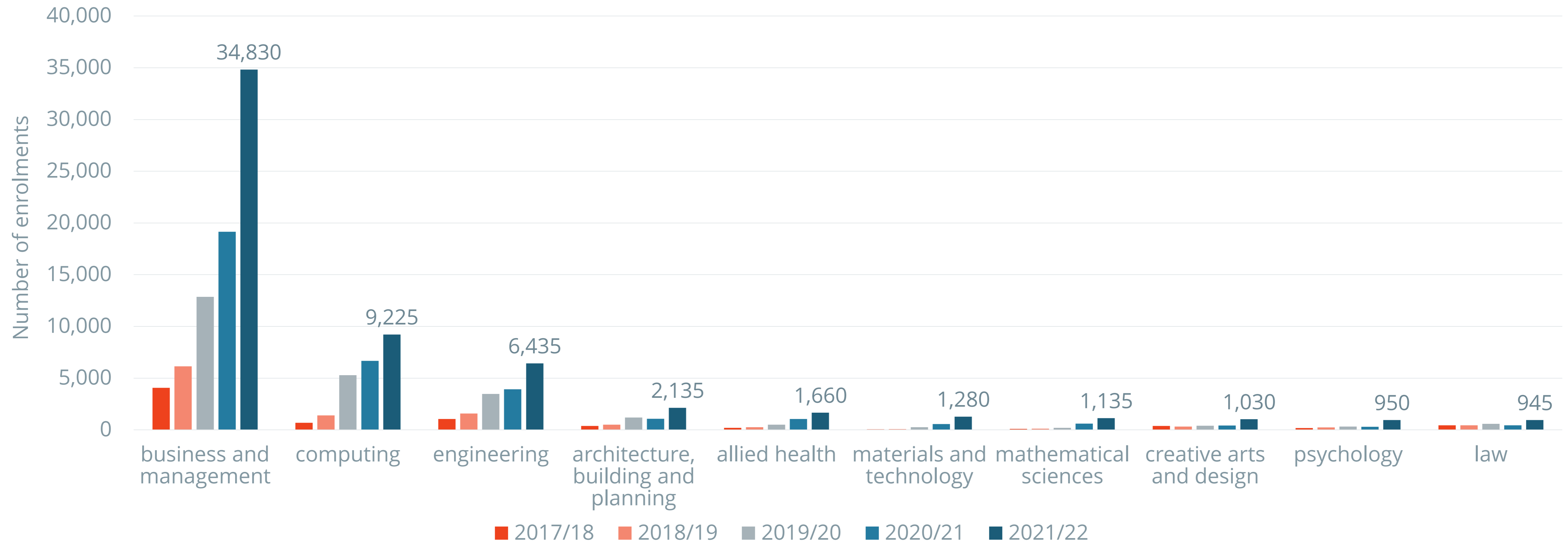
The fastest-growing subject areas between 2020/21 and 2021/22 were **psychology** (222%) and **creative arts and design** (148%). In this period, enrolments for **law** and **materials and technology** also more than doubled, and **mathematical sciences, architecture** and **business and management** experienced more than 80% growth each.

Since 2017/18, postgraduate degrees in **medicine and dentistry, media, and journalism and communications** have fallen out of the top 10 subject areas for Indian students in the UK, replaced by **mathematical sciences** and **materials and technology**.

Overall, it is a positive story for Indian postgraduate student recruitment to the UK, with nine out of the top 10 subject areas experiencing +50% growth between 2020/21 and 2021/22.

# What Indian **postgraduate** students are studying in the UK

The **most popular subject areas** for Indian postgraduate students in the UK in 2021/22



Source: HESA

# Transnational Education (TNE)

Transnational Education (TNE) occurs where a **student studies for a foreign degree in their own domicile**.

There are a number of models in which this can occur – typically the most common are through

- a collaborative degree programme at a local university (e.g., a joint or dual degree),
- a local ‘franchise’ centre or deliver partner (e.g., at a private college that does not have its own degree awarding powers), where the degree is validated by the foreign university,
- at an international branch campus (IBC) of the foreign university, and
- through online learning.

In 2021/22, there were **553,190 enrolments to UK TNE programmes across the world**, with the largest markets being China, Malaysia, Singapore, Sri Lanka and Egypt\*. TNE enrolments in China were over 70,000 in 2021/22.

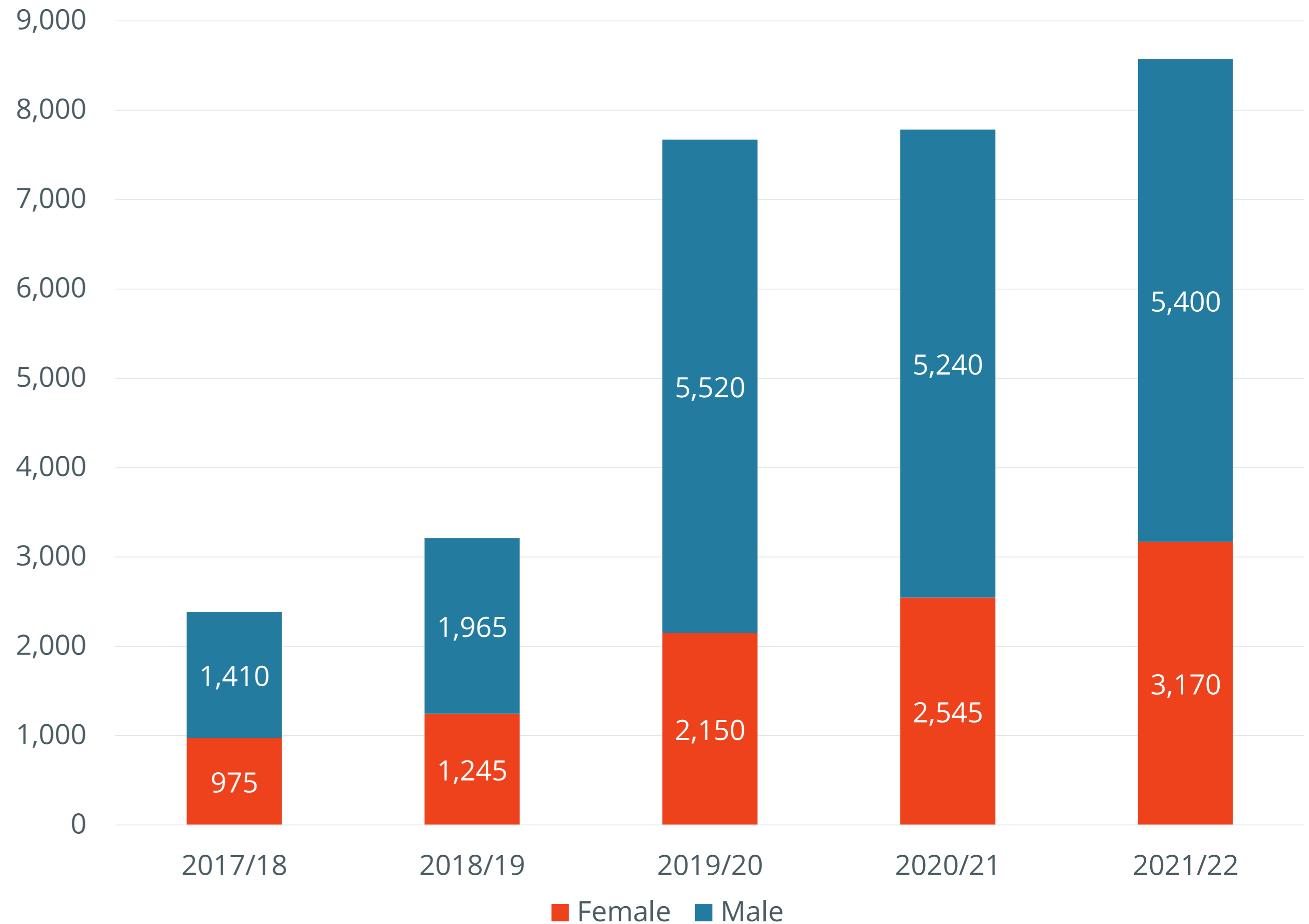
India has traditionally had lower rates of UK TNE. Previous barriers to growing TNE provision in India including perceived over-regulation and lack of clarity about collaboration requirements. However, the release of the National Education Policy in 2020 signalled the Indian government’s intention to encourage greater collaboration between Indian universities and the rest of the world and ensure clearer guidelines and incentives for foreign universities to deliver higher education in India. To this end, in 2022, India’s University Grants Commission released new guidelines facilitating automatic approval processes for dual, joint and twinning programmes between Indian and foreign universities (subject to a number of clearly stated conditions). The Indian government also announced that foreign universities could set up international branch campuses in a specially created zone in GIFT City in Gandhinagar. Two Australian universities – Deakin University and the University of Wollongong, were the first to announce their intention to develop IBCs in India.

As such, the regulatory guidelines for TNE in India are becoming clearer. However, some TNE models, such as franchise degrees and online degrees from foreign university, remain unrecognised by the Indian higher education authorities. All the following TNE data excludes London South Bank, Falmouth University and University of Worcester due to HESA data usage agreements, and also excludes data from Oxford Brookes University.

*\*Source: Universities UK*

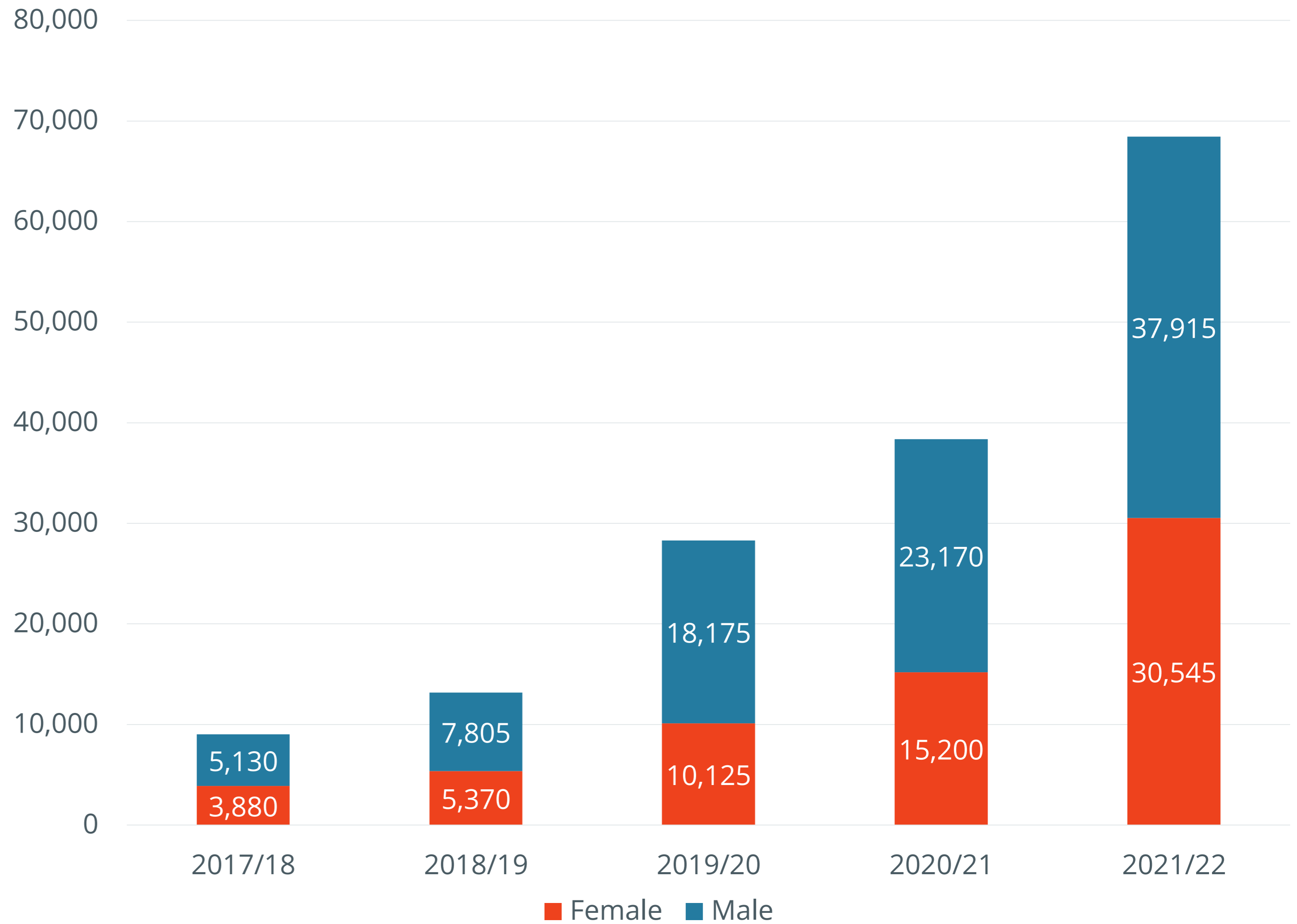


# Distribution of female/male Indian undergraduate students in the UK



Source: HESA

# Distribution of female/male Indian postgraduate students in the UK



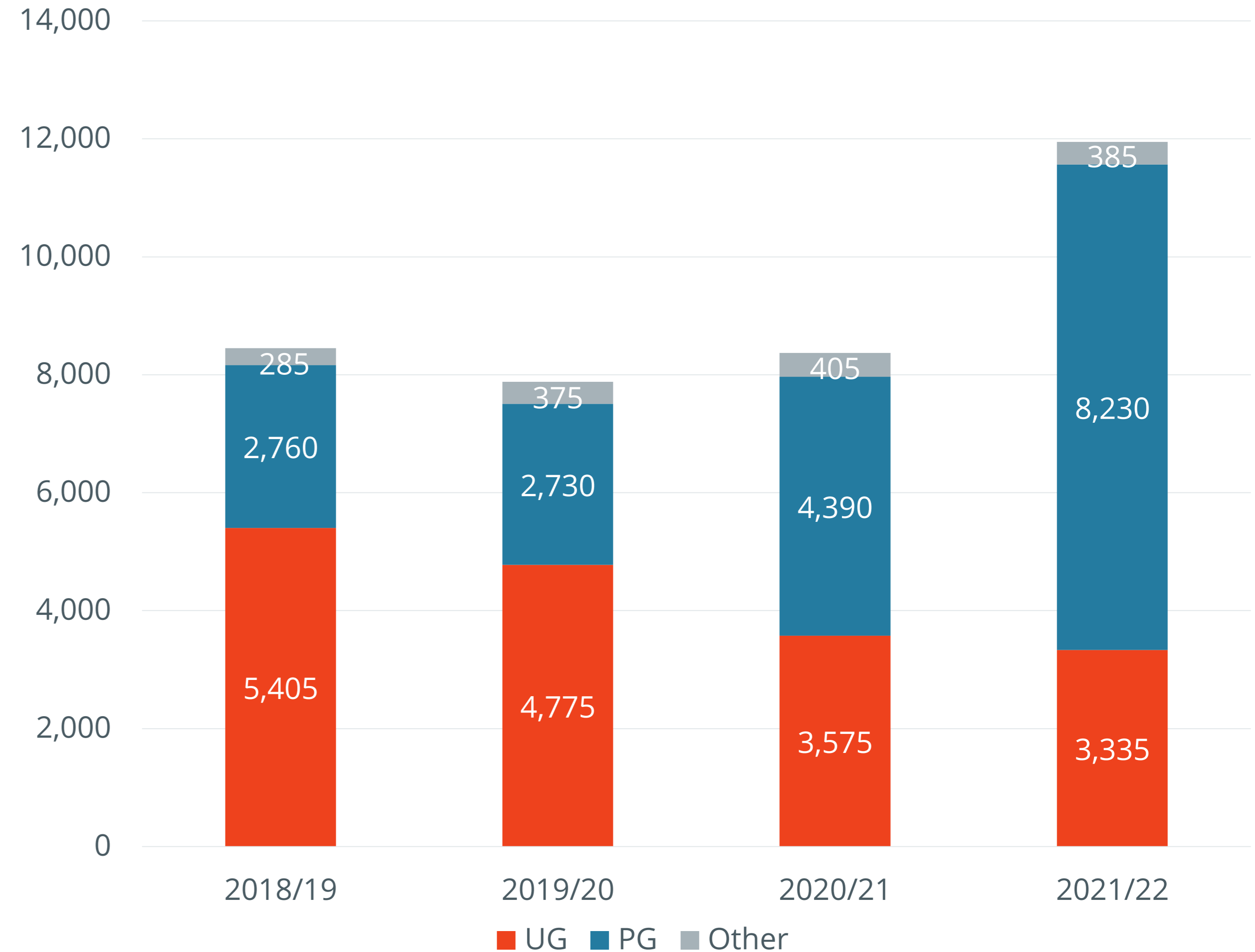
Source: HESA

# UK TNE enrolments in India

There was a significant growth of 43% in UK TNE enrolments in India between 2020/21 and 2021/22, the largest increase in the last four years. The **growth**, however, has been overwhelmingly stimulated by **increases in postgraduate TNE enrolments**, which **rose by 87%**.

By contrast, there has been year-on-year **declines in undergraduate TNE enrolment** in India.

This trend has a broad alignment with the recruitment of Indian students to the UK, which has also had an accelerated growth of postgraduate enrolments and a slower rise of undergraduate enrolment.



Source: HESA

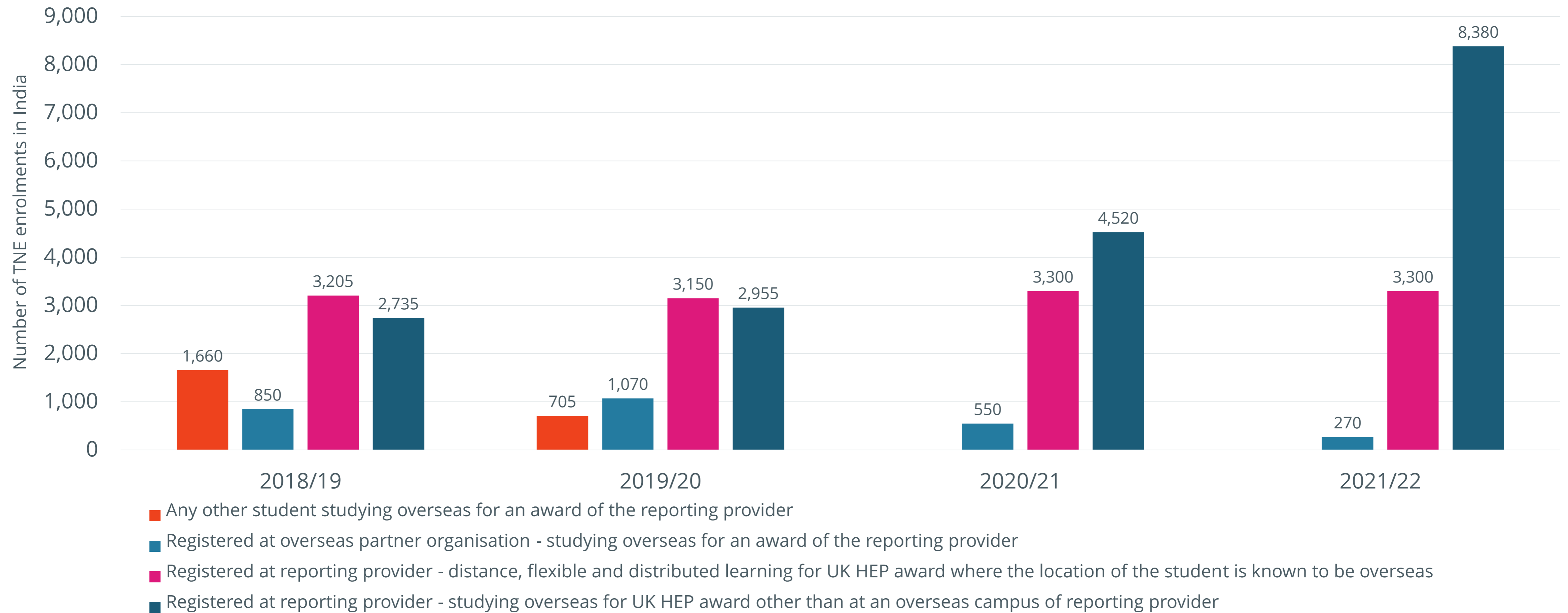
# UK TNE models in India

There are currently no UK branch campuses in India, so the key models are collaborative provisions (in blue) and distance/online learning (in pink). The rise in UK TNE in India for 2021/22 was stimulated by enrolments on collaborative forms of provision where students were registered at the reporting provider (i.e. the UK university). HESA data does not specify precisely which kind of collaborative provision this might be- it could be franchise/validation partnerships, or joint/dual/twinning degrees between UK and Indian universities. As of August 2023, franchise arrangements are not recognised by the Indian regulatory authorities.

UK TNE in the form of distance/online learning in India has remained stable in the last four years, showing very little growth. Overall, UK TNE delivered through distance/online learning globally increased by 7% between 2018/19 and 2021/22, so India is behind the growth rate. However, foreign online degrees are also currently unrecognised by the Indian higher education authorities, and therefore might not be a potential growth area unless those regulations are changed.



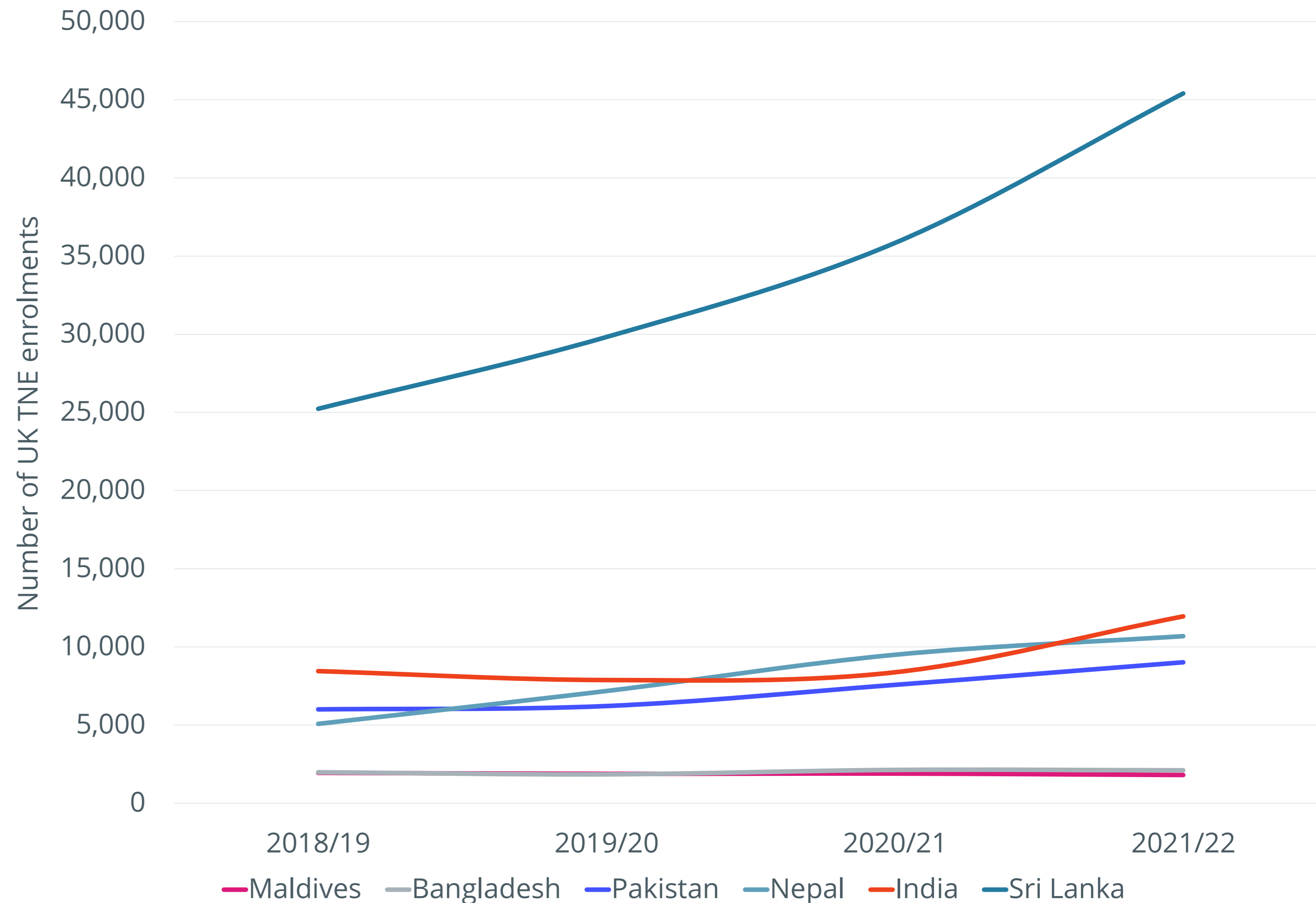
# UK TNE models in India



Source: HESA

## India's position relative to **UK TNE** delivered in other **South Asian countries**

Sri Lanka has been significantly ahead of the rest of the sub-region in the last four years and experienced a 27% increase in UK TNE enrolments in 2021/22. Although India still lags considerably behind Sri Lanka, there was a 43% increase in UK TNE enrolments in 2021/22, making it the fastest growing market for TNE in the sub-region. With encouraging regulatory changes having been made in 2022 to encourage foreign university partnerships, and potentially more regarding branch campuses and other forms of TNE in 2023/24, there is every possibility of this trend continuing.



Source: HESA



Part Four

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# Conclusions and recommendations

# Conclusions

**India is a crucial recruitment market for higher education institutions.** With a population of over 1.4 billion people and a growing middle class, there is a high demand for quality education. India has a strong tradition of academic excellence built upon recognized universities and a pool of qualified students. Furthermore, to sustain the country's growing economy, advanced graduates are required in fields such as business, engineering, and computer science. **Investing in marketing strategies that target prospective Indian students is vital** to attracting diverse, highly qualified applicants who will drive innovation, research excellence, and global institutional growth.

There is more competition than ever for student interest from India. By **leveraging the data insights** surrounding student preference for study **destinations, disciplines, and sub-disciplines**, universities can make informed decisions and identify emerging opportunities. The Studyportals search data from this report shows that there are promising recruitment opportunities in a number of Tier 1 and Tier 2 cities in India, with Business & Management, Computer Science and Engineering programmes being of highest interest. It also shows that prospective Indian students are increasingly looking for courses outside of the traditional Anglophone countries, demonstrating that there could be intensifying competition for Indian students in the future.

A key feature of the analysis of Indian students in UK universities shows that whilst growth has been largely driven by postgraduate students from India, **growth in the undergraduate area has been limited or in some cases negative.** This is an area that could be of concern for universities, given that undergraduate recruitment should provide a minimum of three years of full-time fees.

Increasing undergraduate recruitment from India directly to UK universities as well as through TNE is the key challenge emerging from this data. It has been suggested that **TNE represents a more sustainable way of stimulating undergraduate recruitment**, through models such as the 2+1 degree, where Indian students would only have to pay one year's worth of full-time international fees.

The recent decision by the Indian government not to recognise online degrees from foreign universities makes Transnational Education even more important.



# Conclusions *(continued)*

According to Studyportals data, there has been a general decline in searches at a Bachelor's level from Indian students across many core destinations apart from Australia. Countries as diverse as Italy, Austria and Finland have become more popular in the last 12 months; searches for programmes within India have also become more popular. Whilst Business & Management, Computer Science and Engineering related disciplines remain the most popular, there is evidence of rising interest in Hospitality, Leisure and Sports.

There has also been a decline in Master's level course searches, except within Australia and New Zealand. In terms of absolute demand, Canada, Germany and the UK remain the most popular.

**The big three subject areas remain the most sought-after, with Natural Sciences and Medical-related programmes also in demand.**

In terms of overall absolute demand at a city-level, PG courses outperform UG courses considerably; Tier 2 cities such as Surat and Ludhiana are places that show positive search trends as well as the larger Tier 1 cities.

Indian student recruitment to the UK has risen significantly in the last year, mainly driven by PG level enrolments. Indian students are also diversifying their study destinations within the UK, with regions such as the East of England and Northern Ireland witnessing significant growth of Indian students in the last five years.

UK TNE within India has also seen significant growth in the last year, although it still lags behind in terms of absolute enrolments compared to Sri Lanka, Malaysia, and Singapore. Some of this growth has been driven by online learning, a form of TNE which is currently not recognised by Indian higher education authorities.

**A key question that emerges from this research is whether the falling demand in studying abroad might instead be captured by studying foreign degrees within India, aligning with the Indian governments ambition to increase transnational education in India.**

# Recommendations

The number of Indians studying abroad has grown and diversified in terms of study location; **in theory, India has a potentially strong pipeline of future recruitment**, despite search trends for foreign universities being in decline for some major markets.

Macro-level external and internal issues may have significant influence on this demand, including foreign country visa approval rates and the relative weakness of the Indian rupee compared to foreign currencies.

As the global market for Indian students becomes increasingly competitive, **increasing TNE provision in India provides a sustainable alternative to ensure a stable future pipeline of students**. TNE offerings could also minimise, to a small extent, the impact of restrictions on dependents coming with students to the UK, as students would need to spend less time away from family members.

The current UGC regulations mandate that **joint/dual degrees** should have a **certain component of foreign study**, which would provide Indian students the **opportunity to experience foreign education without paying for the full term of international fees**. This is particularly important **to drive demand for UG study**, where global searches are in decline for Indian students, as well as real enrolments in the UK.

City-based evidence can provide further guide foreign universities to establish TNE in India, as well as drive marketing and programme strategies.



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