State of Play
Using data to develop state and province-level strategies

Thomas Eastwood
Grant Watson
The Large Market Problem
The importance of China and India

• Chinese and Indian HE commencements, as of July 2016, were both up 22% compared to July 2015.

• All other markets together grew 9%.

• Three-year growth from July 2013 to July 2016 was 134% for India and 46% for China.

• 22% for all other markets.

Source: AEI/Austrade
The importance of China and India

- By 2024 India will have the world’s largest tertiary-aged population — **119 million people** — and the world’s largest number of tertiary enrolments — **48 million**.
- China will have the 2\textsuperscript{nd} largest tertiary-aged population — **79 million** — and the 2\textsuperscript{nd} largest number of tertiary enrolments — **37 million**.
- They will be the world’s two largest sources of international postgraduate students: **338,000 from China, 209,000 from India**.

34 provinces, municipalities, and autonomous regions.

36 states and union territories.
Australia’s 20 largest international HE markets

Top 20 international HE markets by visa grants, 2014/15. Source: DIBP
Australia’s 20 largest Chinese provincial HE markets

Top 20 Chinese HE markets by visa grants, 2014/15. Source: DIBP/Austrade
Provinces as countries

Source: DIBP/Austrade
Source: Census of India, 2011.
Australia’s 18 largest HE markets by youth population (15-24 years, excluding China and India)

Source: CIA World Factbook
### Australia’s 18 largest HE markets by youth population (15-24 years, including Indian states)

<table>
<thead>
<tr>
<th>Country</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indonesia</td>
<td>44,002,071</td>
</tr>
<tr>
<td>USA</td>
<td>43,612,557</td>
</tr>
<tr>
<td>Pakistan</td>
<td>43,039,880</td>
</tr>
<tr>
<td>Uttar Pradesh</td>
<td>40,619,028</td>
</tr>
<tr>
<td>Nigeria</td>
<td>38,243,817</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>33,909,682</td>
</tr>
<tr>
<td>Maharashtra</td>
<td>30,508,998</td>
</tr>
<tr>
<td>Philippines</td>
<td>19,672,282</td>
</tr>
<tr>
<td>West Bengal</td>
<td>17,816,353</td>
</tr>
<tr>
<td>Bihar</td>
<td>17,537,430</td>
</tr>
<tr>
<td>Andhra Pradesh</td>
<td>16,225,841</td>
</tr>
<tr>
<td>Vietnam</td>
<td>15,899,572</td>
</tr>
<tr>
<td>Madhya Pradesh</td>
<td>14,174,368</td>
</tr>
<tr>
<td>Rajasthan</td>
<td>13,740,511</td>
</tr>
<tr>
<td>Tamil Nadu</td>
<td>12,665,335</td>
</tr>
<tr>
<td>Karnataka</td>
<td>11,879,835</td>
</tr>
<tr>
<td>Gujarat</td>
<td>11,646,482</td>
</tr>
<tr>
<td>Thailand</td>
<td>9,870,861</td>
</tr>
</tbody>
</table>

Source: CIA World Factbook, Census of India
Rationale of having state strategy

• Identify opportunities in marketplace
• Prioritise recruitment spend
• Cultural/behavioural changes at state or regional level
Using state/province data
Google is your friend

• Enormous amounts of data already available.
• Targeted Google searches.
• Ask the right questions.
“sina weibo usage by province”
“mechanical engineering”

- **www.google.com/trends**
- **Insights:**
  - Interest in India fluctuates on a regular schedule.
  - Greatest state interest in Puducherry, Tamil Nadu, and Odisha.
  - City interest from Madurai, Puducherry and Coimbatore.
Hotcourses

- Shopfront for universities.
- Promotes partner university programs to prospective students.
- Partners can access certain insights provided by Hotcourses.
Undergraduates in India
Mapping the data
Mapping the data

http://www.findlatitudeandlongitude.com/batch-geocode/
Internal data – the missing ingredient

• Focus
  – What do you want to do? What are your needs?
  – What programs/fields of study do you wish to promote?

• Context
  – Are you a big fish in a small pond, or a small fish in a big pond?
  – Where are the best opportunities for you?
State/province strategy at work

GDP per capita
Population
HE enrolments
International schools
University partners
Visa grant rates
Hotcourses
Conclusions
State/province strategy at work

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## State/province strategy at work

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The map shows the distribution of universities and international schools across various regions, with a focus on the University partners section.

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State/province strategy at work

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State/province strategy at work

<table>
<thead>
<tr>
<th>Category</th>
<th>Guangdong</th>
<th>Beijing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subjects</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Humanities</td>
<td>33.3%</td>
<td>34.7%</td>
</tr>
<tr>
<td>Social Studies</td>
<td>16.7%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Healthcare</td>
<td>16.7%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>16.7%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Veterinary Medicine</td>
<td>16.7%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Business and Management</td>
<td>16.7%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Creative Arts and Design</td>
<td>4.4%</td>
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</tr>
</tbody>
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GDP per capita
Population
HE enrolments
International schools
University partners
Visa grant rates

Hotcourses

Conclusions
# State/province strategy at work

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<tr>
<th>GDP per capita</th>
<th>Guangdong, Fujian, Liaoning, Inner Mongolia, Zhejiang, Jiangsu, Shanghai, Beijing, Tianjin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>Guangdong, Henan, Sichuan, Jiangsu, Hebei, Hunan, Anhui, Hubei, Zhejiang</td>
</tr>
<tr>
<td>HE enrolments</td>
<td>2m: Henan, Shandong, Jiangsu, Guangdong. 1.5m: Hebei, Sichuan, Hubei, Hunan, Zhejiang</td>
</tr>
<tr>
<td>International schools</td>
<td>Beijing, Jiangsu, Guangdong, Shanghai, Shandong, Zhejiang, Sichuan, Hubei.</td>
</tr>
<tr>
<td>University partners</td>
<td>Beijing, Shanghai, Jiangsu, Guangdong, Hubei.</td>
</tr>
<tr>
<td>Visa grant rates</td>
<td>Jiangsu, Zhejiang, Hunan, Hubei, Anhui, Sichuan, Shanghai. (all above 90%)</td>
</tr>
<tr>
<td>Hotcourses</td>
<td>Guangdong: Humanities and Social Studies/Media. Beijing: Engineering.</td>
</tr>
<tr>
<td><strong>Conclusions</strong></td>
<td><strong>Target Guangdong for media studies, Beijing for engineering. Develop Sichuan as a new student market.</strong></td>
</tr>
</tbody>
</table>
Final thoughts

- You do not need to do everything – research what you need.
- You do not need to show your working – present what is relevant.
- Ask the right questions – and remind yourself of what they are.
- Try not to drown in data.
- If you get time, play with your data – surprising insights.
Thank you.

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