



Turkey Country Strategy 2015 to 2016

Regional Manager: Nuria Moyano Martin (nmmartin@bournemouth.ac.uk)

1. Overview

- Demand for private higher education in turkey is high due to low in-country provision at public universities and the large number of high school graduates – (1.5 million students graduate from high school each year but only 700,000 places are available at Turkish public universities). This means that the remaining 800,000 students will have to look for other alternatives. Although the UK is still a very popular place to study, the strong value of the British pound against the Turkish Lira has made students to consider much cheaper destinations such as Spain and France.
- In 2012/13 it was reported over 49,000 students from Turkey left the country to study overseas (BC March Report 2012/13). The first choice destination was Germany with more than 25,000 students (although this figure was likely to include Turkish students with domicile in Germany), followed by US with 11,975 and UK with 3,775 - an increase of 94% in the UK when compared with figures from 2004/05. For the last 3 years however, the number of Turkish students studying in the UK has remained almost unchanged as table 2.1 below indicates.
- Turkey is mainly a PG market with over 70% of the students undertaking Master's and Research programmes in the UK. Business, Management, Politics, Clinical Psychology, Computing Sciences, Economics, Finance, Marketing, Engineering and Law remain the main areas of interest which fits well with BU's course portfolio.
- Turkey is very much an Agent-led market with most of the Turkish students using their services for advice on overseas education and study visa processes. This is also well reflected in our recruitment patents with almost 85% of our Turkish students coming via our contracted agents.

2. Statistics and Targets

2.1 Students from Turkey studying in UK HE (Full time NE+Cont.)

Year	Undergrad	Postgrad Taught	Postgrad Research	Total
2013/14	855	1660	1010	3530
2012/13	1070	1730	895	3695
2011/12	1125	1780	780	3685
2010/11	1110	1895	705	3710

Source: HESA data

2.2 Students from Turkey studying at BU (Full time NE+Cont.)

Year	Undergrad	Postgrad Taught	Postgrad Research	Total	Market share
2014/15	9	28	3	50	-
2013/14	7	29	3	39	1.10%
2012/13	8	35	1	44	1.19%

Source: For Tables 2.2 to 2.6, stats are from Academic Business Intelligence April 2015.

Note: Stats include all fee regions – Home/EU and Overseas

2.3 Conversion rates (Sept + Jan combined)

	Applications UG	New enrols UG	Conversion (%)
2014/15	18	6	33.33
2013/14	17	1	5.88
2012/13	18	3	14.29

	Applications PG	New enrols PG	Conversion (%)
2014/15	192	33	16.66
2013/14	125	22	17
2012/13	126	26	20.63

2.4 Agents

Agency	Enrolments			
	2011/12	2012/13	2013/14	2014/15
Alternatif Education	1	1	2	2
ATEC	5	8	3	4
Atlas Private Education	1	3	4	6

British Education Bureau Education Consultancy	12	4	3	10
British Side English Language School	3	1	3	9
Global Vision International Education	8	4	3	1
Global Yurt Disi Egitim	8	2	4	-
TOTAL:	38	23	22	32

2.5 Targets - University-wide: New entrants (Sept + Jan combined)

Year	Undergrad		Postgrad Taught		Postgrad Research		Total		% target exceeded or missed
	Target	Actual	Target	Actual	Target	Actual	Target	Actual	
2017/18									
2016/17	7		29		2		38		
2015/16	6		27		1		34		
2014/15	5	6	25	32	0	1	30	39	23%
2013/14	XX	1	XX	21	XX	1	XX	23	N/A

2.6 Breakdown by School/Academic Department of Data on Newly Enrolled Students (Sept + Jan combined)

School	UG 2012/ 13	UG 2013/ 14	UG 2014/15	PGT 2012/ 13	PGT 2013/ 14	PGT 2014/15	PGR 2012/ 13	PGR 2013/ 14	PGR 2014/15
Applied Science	0	0	0	0	0	1	0	0	0
Business School	1	1	3	20	15	22	0	1	1
DEC	0	0	1	0	1	2	0	1	0
HSC	0	0	0	0	0	0	0	0	0
Media School	2	0	1	1	2	6	0	0	0
Law	0	0	0	1	2	0	0	0	0
School of Tourism	0	0	1	2	3	1	0	0	0
Combined*	0	0	0	0	0	0	0	0	0
Totals	3	1	6	26	22	32	0	2	1

Note: The Law subjects stats are **included** in the total BS stats

*Combined- BA Marketing between Business School and Media school

2.7 Top 10 recruiters in the UK 2013/14 (New and Continuing Students)

Institution*	First Degree Turkey First Year 2013/14	Postgraduate Taught Turkey First Year 2013/14	Postgraduate Research Turkey First Year 2013/14	Total
Cardiff Metropolitan University	25	75	0	105
King's College London	25	55	25	105
The University of Sussex	25	55	20	100
The City University	25	65	5	95
The University of Manchester	25	30	35	90
University of Nottingham	35	20	30	85
University of the Arts, London	65	15	0	80
Brunel University London	20	50	10	80
The University of Warwick	10	45	20	80
Queen Mary University of London	15	50	10	75
Bournemouth University (24th on the list)	5	35	5	45

Source: HESA 2013/14

3. Marketing Activities (Planned)

3.1 Key messages

- High ranking in Media and Tourism and only NCCA in the UK.
- Indefinite Academic Scholarships available for Turkish students at UG and PG level.
- High Graduate Employment Rate with strong links with industry.
- Modern and innovative University with emphasis on professional education.
- Work placement opportunities in all our UG courses and also available in our BS, ST and some MS Postgraduate course.
- International and welcoming community.
- A range of Masters available in September and January.
- Great location with excellent transport links to London and other major cities and own International Airport.
- Affordable and safe place to live with one of the best climates in the UK, plenty of entertainments and 12 km of sandy beaches.
- Guaranteed accommodation.
- Recent major investments in the Campuses – creation of new buildings and better student's facilities.

3.2 Advertising and Public Relations (consider on-line and off-line advertising)

Timing	Event/Activity	Support required (e.g. Marcomms, PR)
Nov 2015	<ul style="list-style-type: none"> • Study Wise Magazine 	<ul style="list-style-type: none"> • Marcomms
March 2016	<ul style="list-style-type: none"> • Global Vision Magazine 	<ul style="list-style-type: none"> • Marcomms

3.3 External Contacts and Relationship Building

- Continue to work closely with our Turkish agents and support them in their marketing activities to encourage student recruitment.
- Continue to work closely with the BC in Turkey. They are a good source for market information, partnership collaboration and BU promotion.
- Important to build strong relationships with school counsellors from international local schools as they are major influencers in student decisions and can help with local qualifications and grades.
- Work closely with the BU Schools to encourage Erasmus and Staff/Student Exchange programmes in the market.

3.4 Alumni activities

- Continue to develop our Alumni network in Turkey via:
 - organising an annual event at Bournemouth for current students from this market and to develop our Alumni network in the future
 - organising an annual Alumni Reception in Istanbul inviting offer holders to join the event too
 - keeping updated our Alumni of any in-country visits and activities and encouraging them to participate when possible

3.5 International Team-led Activities in the Market

Country	Timing (mm/yy)	Event/Activity	Who involved	Faculty (FoM, FST, HSS, FMC, all)
Turkey	Oct-15	A2 Fair in Istanbul (3 days event) +Doga School Fair+ Agents Training	NMM	all
Turkey	March/April 2016	A2 or IEFT or BC Fair (3 cities)	NMM	all
Turkey	May-16	Agents Visits - Student Sessions	NMM	all
Turkey	Jul-16	Conversion Trip- Student sessions (2 cities) + Alumni Event	NMM Alumni	all
Turkey	On-going	Freighting Costs	N/A	N/A

4. Strategic Partnerships and Collaboration

4.1 Consortium approaches

- None identified

4.2 Kaplan related activities

Enrolments				
	PSEUSP Enrols	Pathways Enrols	Total (enrols)	% of all NE
2014/15	1	2	3	6%
2013/14	3	0	3	7.69%

4.3 Partnerships

Current Strategic partnerships				
Partner Name	Academic Area	Partner (model)	Enrolment – (Apps)	Interaction (what are we doing with that partner in 2015-16 to support them)
Bilkent University	MS	Erasmus, Staff Exchange	1 Erasmus student	N/A
Bogazici University	ST	Erasmus, Staff Exchange	None	
Bilgi University	MS	Erasmus, Staff Exchange	1 Erasmus student	
Yeditepe University	BS	Erasmus, Staff Exchange	1 Erasmus student	

Additional Strategic partnerships (potential)			
Partner Name	Academic Area	Partner (model)	Projected enrolment/interaction
Bilkent University	Psychology & Business	Erasmus, staff Exchange	2
Atilin University	Business	3+1 leading to top up	4
Ozyegin University	Business and Tourism	3+1 leading to BU top up	4

5 Key Academic Areas and Proposed Engagement in the Market

5.1 The most popular programmes nationally for this market are:

- Business and Administration studies
- Social Studies
- Engineering and Technology
- Law
- Creative Arts
- Languages
- Biological science

Source: HESA 2013/14

5.2 The most popular courses at BU are:

- Msc International Management Framework
- Msc Marketing with Management
- Msc International Finance Framework
- LLM Framework
- Msc Engineering Project Management
- Msc Foundations of Clinical Psychology
- MA Product Design
- MA Computer Animation
- Msc Computer Animation and Visual Effects
- MA Media and Communications

Source: BU Olikview May 2015

5.3 Potential in the Market for the University's Academic Areas -2016/17

Acad School	Fdn Potential	UG Potential	PGT Potential	PGR Potential	Recognition Potential	Collab Potential	Study Abroad/ Exchange	Visits by Academics Recommended (include possible times of year)
Applied Sciences	No	No	Yes	Yes	No	No	No	No
Business & Mgmt	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
DEC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
HSC	Yes	No	No	No	No	No	No	No
Media	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
Law	No	No	Yes	No	Yes	No	No	No
Tourism	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No