University of Glasgow

VIA VERITAS VITA

STRATEGIC MARKETING

PGT MARKET ASSESSMENT ANALYSIS REPORT

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Executive Summary

In September 2010, it was agreed that the Recruitment and International Office would provide market assessments for new and existing PGT programmes as part of the course and programme approval process to support the University's ambitious targets to grow and diversify its international student population. These 'light touch' market assessments provide an insight into the international market potential for PGT programmes based on market trends and intelligence from the International Recruitment Officers who are 'out in the field'.

This report reviews the market assessment process to ensure continuous improvement and the findings will be fed into the Education Policy and Strategy Committee (EdPSC) and the Academic Standards Committee (ASC). The International Business Development Forum, comprising College Business Development Managers, Recruitment Conversion Marketing Officers, the Academic Collaborations Office, as well as the Senate Office and the Senior International Officers, were consulted.

Market assessments play an important role in ensuring the University maintains its market position and high standard of programme provision. They also ensure that we are considering market demand and potential when designing new programmes.

Key findings of the review:

- 110 market assessments were completed between November 2010 and June 2012 (181 to date) using a 3-point traffic light system.

- 19% of the 110 proposed degree programmes were deemed to have significant international market potential (green status). The overall results were 16 red, 73 amber and 21 green.

- Early 'indication of success' has been recommended as a fair predictor of long-term achievement in PGT international recruitment. That is, results from at least the first two recruitment cycles will provide a relatively accurate measure of the success of a newly marketed programme (Coyle & Roberts, 2012).

- The 110 market assessments included, 75 programmes recruited in 2011/2012 and/or 2012/13 and 8 confirmed to start recruiting in 2013/14.

- The provision of key information by Colleges when requesting a market assessment can facilitate a more informed assessment; information such as the programme's potential target audience, career path and unique selling proposition.

- The proposed revised market assessment process uses a more evidence-based traffic light status assignment.

Finally, a number of recommendations and planned actions are proposed to enhance the market assessment process. These enhancements will:

- Streamline the process with the International Recruitment team to improve turnaround times and ensure they are achievable.
- Ensure that Colleges provide more detailed information, in some cases, to support better assessment of the market potential.
- Confirm that programmes being assessed fit strategically with College aspirations.
- Provide more clarity around the allocation of a traffic light.

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Background

The Strategic Marketing (SM) team in the Recruitment and International Office (RIO) provides business intelligence support and specialist advice covering market trends, performance data, recruitment and admissions in the UK and overseas and across all of the University's key business development areas: undergraduate, postgraduate, student mobility, transnational education (TNE) and tuition fees setting. Our market intelligence informs strategic decision making within RIO and the University.

The University has set ambitious targets to grow and diversify its international student population. To support this, the SM team works with the Senior International Officers (SIOs) to provide an insight into the **international** market potential for **PGT** programmes.   This system was set up originally as a 'light touch' review of market potential with a quick turnaround.   Market assessments determine the degree of international market opportunity that a potential PGT programme may have, based on market trends in programme availability, Higher Education Statistics Agency (HESA) data, and intelligence from the SIOs who are 'out in the field'.

Market assessment as part of PIP process

PGT market assessments are required by the Senate Office as part of the course and programme approval process.   The Senate Office approval flowchart (Figure 1) outlines the various steps required in course and degree programme approval.   RIO's market assessment step in this process is highlighted by a red arrow.
(Source: http://www.gla.ac.uk/media/media_106212_en.pdf)

The academics or programme administrators submit the market assessment request to the SM team via email. The completed market assessment report is returned to the request originator to be included in their Programme Information Process (PIP) approval business case document. The business case for the new programme will subsequently go through the College and Senate approval scrutiny. It is possible that the Colleges use the market assessment reports in slightly different ways.

The market assessment works as a service that RIO provides to the Colleges to inform their programme approval process. However the decision on programme approval is not dependent on the market assessment report alone; neither does the subsequent decision making process involve RIO.
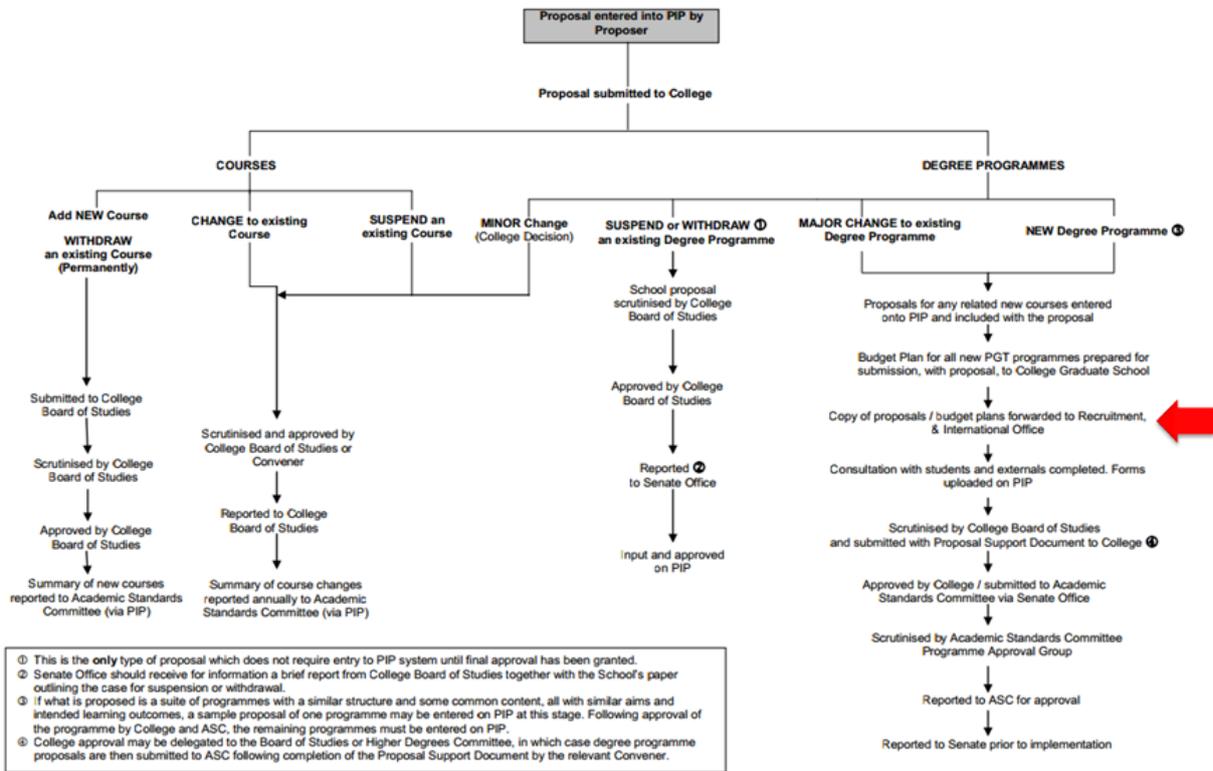
Figure 1: Adapted model of Senate Office approval flowchart highlighting the role of RIO market assessment

Internal review of market assessment process

The Academic Standards Committee requested that RIO reviewed the market assessment process and the allocation of traffic lights, in particular. The committee minute stated:

ASC/2012/23.2 Report from the Meeting of Deans of Learning & Teaching re: Programme and Course Approval Process

"It was noted that in follow up to the above report RIO had been invited to review their traffic light system for reviewing viability of proposed new programmes. In addition, the process for notifying key course changes to relevant parties had been referred to a new Working Group established by the Vice Principal (Learning & Teaching) which was considering Programme Plan and Programme Specification data. The Convener, who was a member of the Working Group, reported that the question of updating data across plans, programme and course specifications had been identified as a significant issue to be addressed."

(Source: https://frontdoor.spa.gla.ac.uk/commdoc/senate/ASC/Minutes/minutes_2012-11-16.htm)

The current market assessment process and research methodology

The current market assessment process and recommended new steps are outlined in Figure 2. The required information about the proposed programme, the outline of market intelligence provided in the market assessment report and some useful resources can be found on the market assessment webpage: http://www.gla.ac.uk/services/rio/marketassessmenttemplate/ .
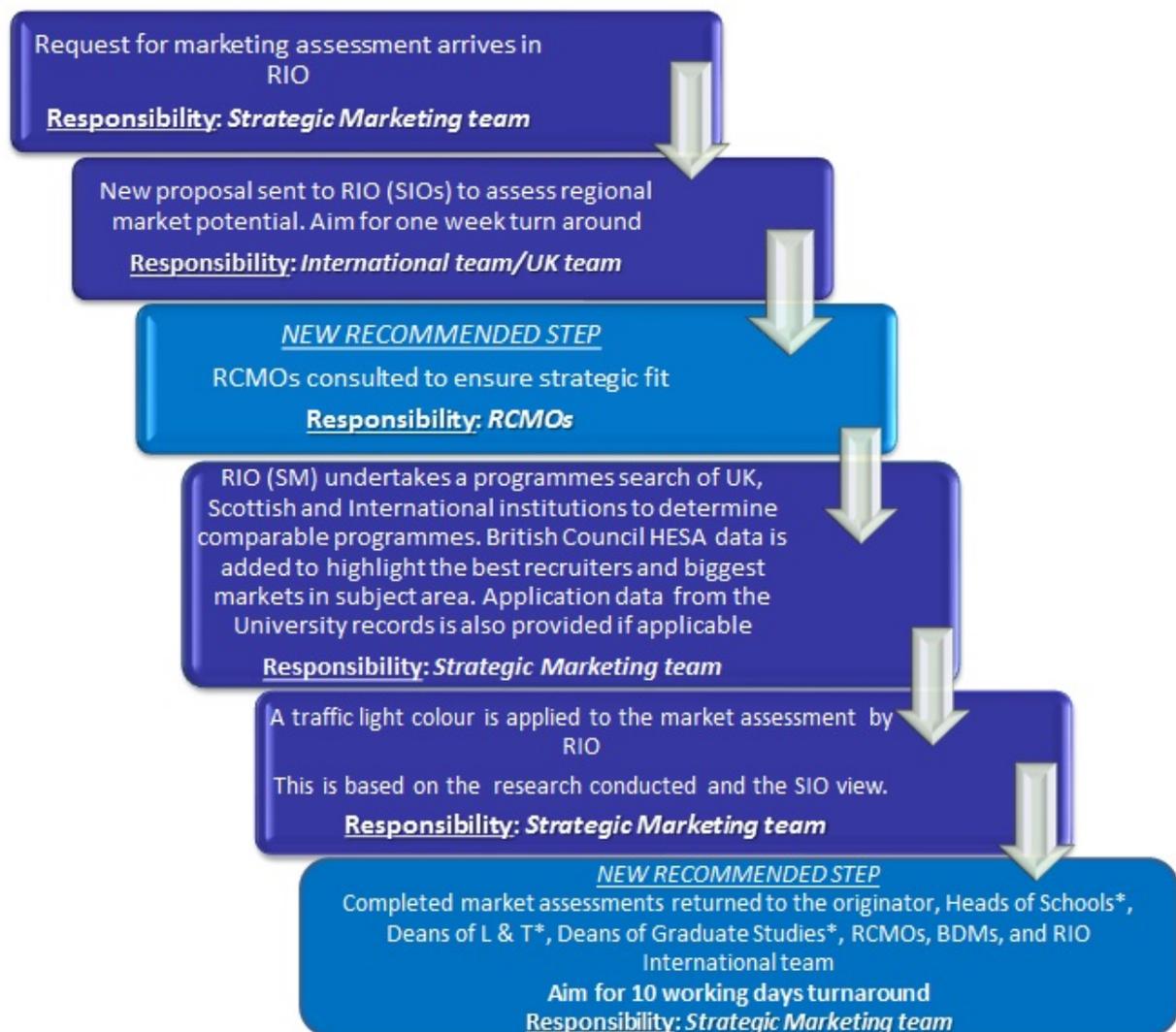
*additions to circulation list

Figure 2: Flowchart of the current PGT market assessment process with recommended new steps

When a request for a market assessment is sent to RIO by the College, this request is recorded in the SM research activity register, in chronological order. The register documents basic information about the request with a target finish date given to ensure that turnaround times are monitored. The register is also used to analyse the number and type of market assessments that have been carried out for each of the Colleges. The market intelligence includes the following:

Regional assessment: the request is then sent to the Senior International Officers (SIOs) for their regional assessment. The SIOs are asked to provide as much intelligence as possible from their knowledge of their region and the enquiries that they have received in the past. The SIOs also comment on or take the hub and spoke model into consideration when appropriate.

Competitor report: meanwhile, the Strategic Marketing team carries out a programme search for comparable degree provision in competitor higher education institutions. This process usually begins with a search of Scottish, then rest of UK institutions and also, if appropriate, international institutions, such as U21 partners. Competitor programmes in the market are provided in the market assessment report, including content/structure of the programme, tuition fees, USP e.g. accreditations, work experience, field trips, international experience, online delivery etc.

Recruitment statistics: SM also provides recruitment data on the programme subject area from the Higher Education Statistics Agency (HESA) database supported by British Council 'Education Intelligence data mining tools' (https://siem.britishcouncil.org/). This allows SM to identify the biggest recruiters and largest markets in the subject area that may offer potential for the proposed programme. UCAS data for UG provision and UoG application data, when appropriate, are provided as well as ranking of competitor institutions for certain programmes from the Complete University Guide.

Additional intelligence: the SM team frequently record 'other notes' to provide interested parties with further intelligence, for example, recent application numbers to similar programmes at the University and information on career prospect when available. The market assessment template used is provided in Appendix 1.

The final assessment weighs up the comments from the Senior International Officers (SIOs) and data search information. A traffic light status is then applied to the market assessment and sometimes recommendations for improvement are also provided.

The completed market assessment report is then returned to the originator, the RCMOs/BDMs, Deans of Learning and Teaching and Deans of Graduate Studies as appropriate. It has also been suggested that RCMOs liaise with Heads of Schools. The market assessment report forms part of the new programme proposal business case, which the originator will use for College approval and Senate approval scrutiny. Currently once the market assessment report is returned and accepted by the originator, RIO has no further responsibility for the programme approval. It is up to the Colleges and Senate Office to evaluate the programme viabilities and ultimately make the approval decision.

Originally this full process was to be completed in five working days. However, the increasing volume of requests and increased breadth of data provision for market assessments meant that the turnaround target was later changed to 10 working days from receipt of full information. The

traffic light colour assigned to the market assessment is recorded in the research activity log held by SM to monitor services provided to the Colleges.

Some issues have arisen in relation to communication and fit with College priorities. RCMOs have recently been invited to review the proposed programme at an early stage to ensure College strategic fit and the Deans of Learning and Teaching, the Deans of Graduate Studies, RCMOs and College Business Development Managers are all now copied into the final assessment.

Traffic Light Status

The traffic light assigned to the potential PGT international market opportunity is based on market trend and recruitment intelligence. Notionally some Colleges consider a viable programme to attract about six international students (for Arts) and 12 (for Social Sciences) within the first two full years of marketing the programme.

- Red indicates a degree programme that is deemed to have little or no international market potential;
- Amber indicates a degree programme with some international market potential;
- Green indicates a degree programme with significant international market potential.
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In the case when a red traffic light is assigned, the originator has been encouraged to work with the Heads of Strategic Marketing and the International Recruitment to develop ways to improve the programme design and the recruitment potential.

Assessment volume

Up to September 2012, 154 market assessments have been completed by the Strategic Marketing team, across the four Colleges. In total, 110 market assessments were included in this process review – those undertaken between November 2010 and June 2012 i.e. those which have had a chance to be marketed and recruit students. Figure 3 below shows the monthly distribution of the number of market assessments received by RIO between September 2010 to January 2014 to illustrate the work volume and seasonal fluctuations.
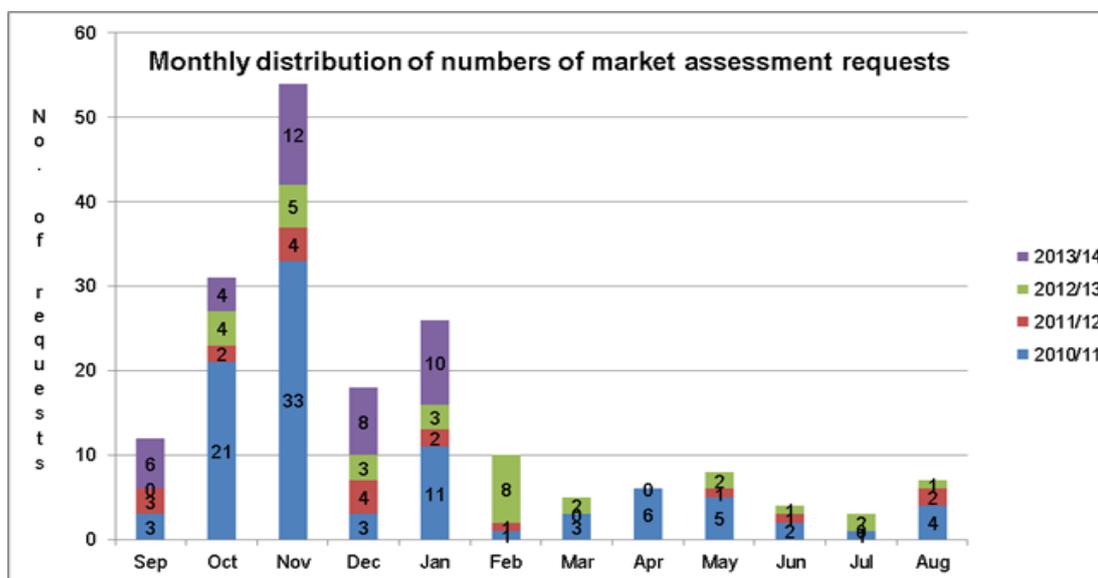
Figure 3: Monthly distribution of the number of market assessment requests 2010/11-2013/14

Assessment results
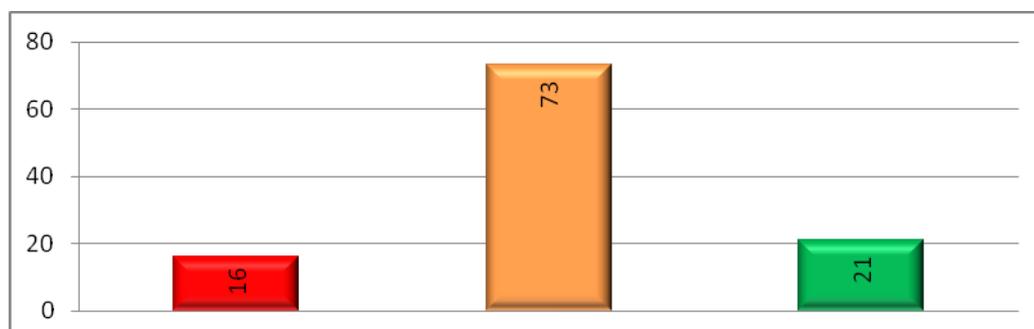
Figure 4: Numbers of traffic light status assigned to the 110 market assessments reviewed

Of the 110 market assessments reviewed; 16 (15%) were assigned a red, 73 (66%) were assigned an amber and 21 (19%) were assigned a green traffic light.

As shown in Figure 4, across the four Colleges, the majority of the proposed PGT programmes assessed by RIO were considered to have some market potential (amber status; 66%), with less than 20% being considered to have significant market potential (green status).

Table 1 below shows the numbers of market assessments carried out for each College, and the numbers of each traffic light assigned. The College of Science & Engineering requested the highest number of market assessments which were a mix of new and existing programmes followed by the Colleges of Arts, Social Sciences and Medicine, Veterinary and Life Sciences. The College of Social Sciences had the highest number of programmes assessed with significant market potential (27%).

Table 1: Numbers and percentages of market assessments by College and traffic light status

College	No. of Red	No. of Amber	No. of Green	Total
Arts	4 (15%)	17 (63%)	6 (22%)	27 (25%)
MVLS	2 (9%)	19 (83%)	2 (9%)	23 (21%)
CoSE	6 (18%)	22 (65%)	6 (18%)	34 (31%)
CoSS	4 (15%)	15 (58%)	7 (27%)	26 (24%)
All	16 (15%)	73 (66%)	21 (19%)	110

Source: RIO's Strategic Marketing research activity record.xls

Review of assessed programmes approved and recruited by 2012-13

The number of student applications and conversion data are monitored by RIO to inform market opportunities, areas of growth and decline and areas of new potential. Recent application and recruitment results data was analysed for programmes that have been subject to market assessment, in order to determine the accuracy of the traffic light assigned to the 110 market assessments currently under review. Appendix 2 shows the applications and recruitment results for the 110 market assessments under review.

The programmes that recruited students in 2011/12 and 2012/13 were reviewed. Table 2 shows that 75 of the 110 assessed programmes received applications in 2011/12 and/or 2012/13. A further eight assessed programmes will be launched in 2013/14 according to the College Recruitment Conversion Marketing Officers (RCMOs). The remainder of the programmes are still under review.

Table 2: Number of assessed programmes approved and recruited by 2013

Traffic light	Total No. of assessed PGT Programmes in recruitment for 11/12 or 12/13	Total No. of assessed PGT Programmes in recruitment for 13/14 or 14/15	Total No. of assessed PGT programmes not yet recruiting (Pending approval)
No. of Red	11	1	4
No. of Amber	51	5	17
No. of Green	13	2	6
Total	75	8	27

Source: PGT applications 2009-12 08Jul13.xlsx

Applications by student residency

The annual number of applications to each programme provides a rough but reliable measure of the market potential for a particular PGT programme. It provides tangible evidence of market interest from applicants in the UK and abroad, although these applications are not all converted to students taking up a place. The following charts summarise:

- the number of the assessed programmes which received applications (Figure 5);
- the total numbers of annual applications from Home/EU (Figure 6); and
- International (Figure 7) applicants in the four Colleges between 2009 and 2012.

The market assessment process only became a requirement in late 2010. The application numbers for 2009 and 2010 are used as baseline numbers for comparison and include programmes which existed in 2009 but went through the market assessment process after that. The numbers of assessed programmes having been approved and in recruitment increased since 2010 across all Colleges (Figure 5). The annual applications from both Home/EU and International students to these programmes increased with the numbers of programmes since 2010 across all Colleges (Figure 6 and Figure 7). Science & Engineering and Social Sciences attracted the highest numbers of international applications, although low conversion rates have limited the numbers of registrations in the former.
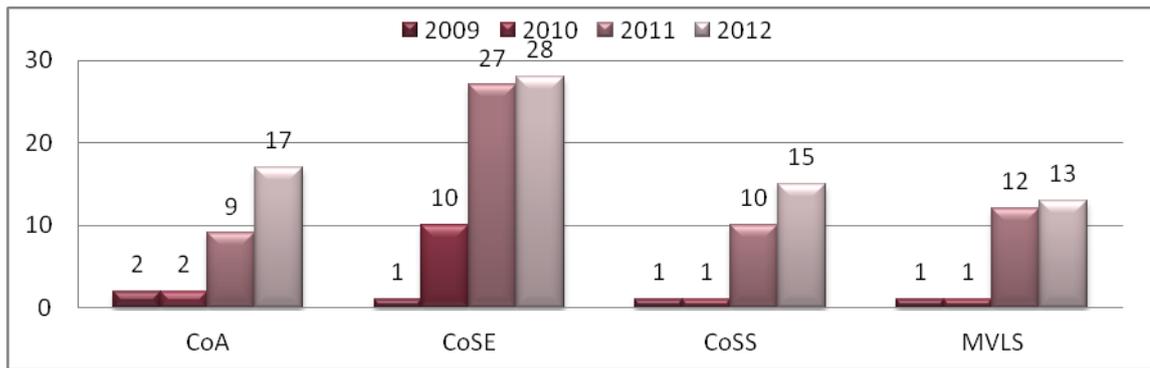
Figure 5: Total numbers of assessed programmes receiving applications in 2009 to 2012 by College
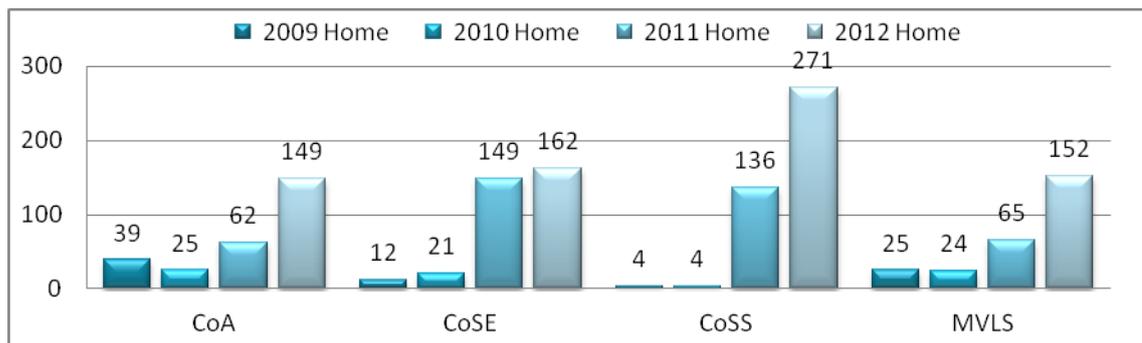
Figure 6: Number of applications from Home/EU students received for the assessed programmes in 2009 to 2012 by College
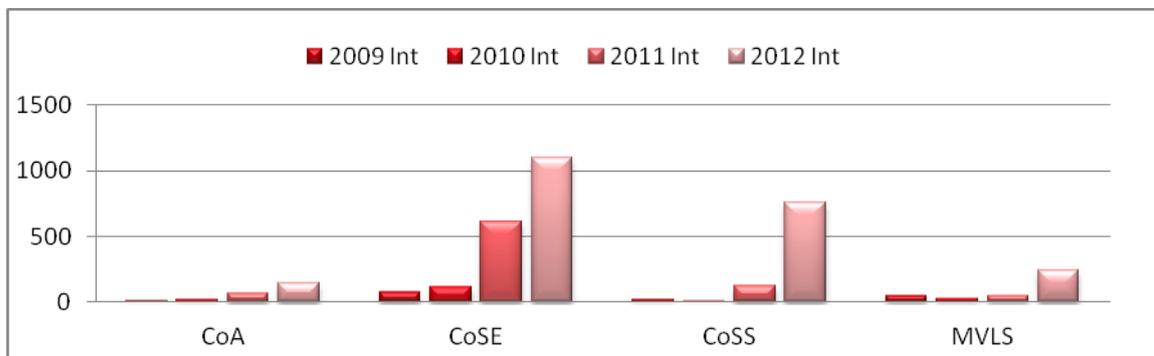
Figure 7: Numbers of applications from International students received for the assessed programmes in 2009 to 2012 by College

Recruitment Results by College between 2011/12 and 2012/13

The recruitment results in terms of home and international student registrations to the assessed programmes in 2011/12 and 2012/13 are examined for each Colleges (Figure 8). The data shows that the biggest area of growth has been seen in the CoSS followed by MVLS and Arts respectively. Despite the significant increase in application numbers, the actual student registrations for the assessed programmes in CoSE have remained stagnant.
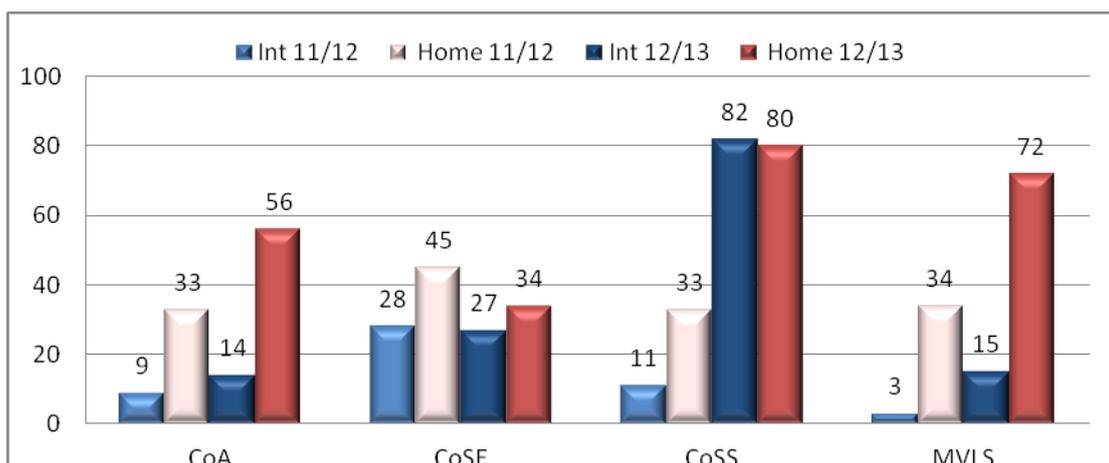
Figure 8: Numbers of International students registered to the assessed programmes in 2011 and 2012 by College

Conversion Rates

Conversion rates refer to the ratio of the number of students who fully register to study at the University to student applications to a particular programme. The conversion rates of the four Colleges in 2011 and 2012 are shown in Table 3 below.

Table 3: Application to registration conversion rates for the assessed programmes by College in 2011 and 2012

College	Home 2011/12	International 2011/12	Home 2012/13	International 2012/13
CoA	53%	13%	38%	9%
CoSE	30%	5%	21%	2%
CoSS	24%	9%	30%	11%
MVLS	52%	6%	47%	6%
Average	*40%*	*8%*	*34%*	*7%*

The results highlight the difficulties around conversion. The application to registration conversion rate for Home students varies by 20% to 50% across Colleges. The conversion rate for International students is around 10% for Arts and Social Sciences lower for STEM programmes. The CoSE conversion rate for International students in 2012/13 was only 2%, which may be attributed to the lack of conversion activity whilst recruiting a new RCMO in the College. CoA has the highest numbers (8) of new programmes rolled out in 2012/13 recruitment cycle. A lower conversion rate for these programmes is expected, which explains the drop in conversion rates in CoA. It was recommended by the Innovation in the Market Assurance of New Programmes (iMAP) project that at least two full recruitment cycles is required to maximise the full recruitment potential of any new PGT programme.

Data analysis good practice

The data analysis process for assessing the cut off rates is similar to the process outlined in a recent report by the HEFCE, Leadership and Governance Project (i-MAP) on the market assurance of new programmes (Coyle & Roberts, 2012). The report looked at two cycles of recruited student numbers to determine the success rates of new programmes. The report concludes that "'*instant success' is highly predictive of sustained success. Starting with low levels of admissions and then growing to viable numbers was uncommon. The project recommends that Universities keep the success of courses under review in the early years of their delivery*" (page 10).

Review of assessment process and traffic light assignment

When the market assessment process commenced, a rough rule of thumb was suggested by the Colleges of Arts and Social Sciences in relation to the number of international students required making a programme viable. Six registrations for Arts and 12 for Social Sciences were suggested at the time.

To measure whether the traffic light system used for grading the market assessments is being applied in a fair and proportionate manner, a method of quantifying the traffic lights was developed to carry out the internal review. The variation of typical application numbers received by programmes in different Colleges was taken into consideration. A set of definitions for the different traffic lights for each College were determined based on the current applications received by the full PGT programme portfolio in the College.

Basically in each College, after ranking all PGT programmes according to the numbers of applications received in 2012, the lowest recruiting 25% of programmes are deemed as recruiting poorly (red), the middle 50% of programmes are considered recruiting moderately well (amber), and the most attractive 25% of programmes are considered recruiting well (green). Due to the extraordinarily high numbers of applications to the Business School programmes, the Adam Smith Business School programmes are analysed separately from CoSS. The numbers of applications falling into the three sections differ across Colleges (Table 4 below).

Purpose of College specific cut off ranges

Using the above mentioned method, two sets of cut off ranges (Table 4) were produced; one that took account of total applications and a second which focused on the international student applications only. The use of two ranges aimed to reflect an evidence-based approach:

1. That each College is different and attracts a different number of students
2. To assessing the market potential
3. That reflects each College individually, and is based on the individual Colleges' previously achieved application numbers.

Table 4: Traffic Light Status delimitations with ranges of annual applications per programme for each College (all students and international students only)

ALL	Red	Amber	Green
Arts	1 to 2	3 to 15	16+
MVLS	4 to 12	13 to 29	30+
CoSE	8 to 24	25 to 95	96+
CoSS (excl. ASBS)	2 to 10	11 to 25	26+
ASBS	7 to 84	85 to 308	309+

International	Red	Amber	Green
Arts	0 to 1	2 to 7	8+
MVLS	1 to 6	7 to 18	19+
CoSE	6 to 18	19 to 81	82+
CoSS (excl. ASBS)	0 to 3	4 to 12	13+
ASBS	6 to 78	79 to 277	278+

Traffic Light Status validation: Reflection on previous market assessments

In light of the new traffic light colour cut offs by College described above, the previously graded market assessments were reviewed to compare how their subsequent applications related to the new colour system. Table 5 reviews the green and red market assessment rates to determine level of error.

Table 5: Levels of error in previous market assessments when compared with new cut off ranges

	CoA	MVLS	CoSE	CoSS	BS
Total No. of correct	7	3	7	4	0
Total No. of wrong ambers	6	9	14	7	0
No. major errors	3	0	7	3	1
Total No. of assessments	16	12	28	14	1
% of major errors	19%	0%	25%	21%	100%

The results in Table 5 show the numbers and percentage of error according to the new traffic light definition in the previous market assessments. Wrong amber refers to the assessment assigned with an amber light, but should have been red or green according to the new definition. Major error refers to the assessments assigned with a red or green light, but should not have been. Overall the market assessment process has produced a relatively low level of major error (average 20%).

However, it should be noted that the market assessments carried out to date have not taken the new traffic light measurement into consideration. It has been recommended by the iMAP project to use the recruitment results of the first two years to measure the likelihood of success. Some of the new programmes in their first recruitment cycle in 2012/13 have not reached their full recruitment capacity, which might explain the 'wrong' traffic light using the new measure system. Given another full recruitment cycle, these programmes may grow into their originally assigned traffic lights.

With the newly developed traffic light definition, the error rate is expected to reduce in the future market assessments.

Traffic Light Assignment

There have been some reservations raised about the three-tier system perhaps not providing 'clarity' around whether a College should proceed or not at any given stage. The 'amber' rating in particular has been questioned in that it may not be clear whether it is thought that there might be sufficient potential market. It has also been questioned what each traffic light constitutes. Below we provide a definition for each:

Green will be determined by:

- expected registrations (6 for Arts; 12 for Social Sciences; MVLS and Sci & Eng to be determined)
- selling points
- links to professional bodies
- clear defined career path
- placement opportunities/project work/fieldwork trips
- College strategic fit
- market opportunity

Amber will be determined by:
- 'some' expected registrations
- 'some' SPs but not unique
- 'some' link with professional bodies
- 'some' reference to career path
- modules may require further development
- College strategic fit
- 'some' market opportunities but may not be from 'expected' markets
  In cases where 'some' but 'very limited' perhaps 'niche' market potential is identified, this will be stressed by RIO.

Red will be determined by:

- fewer expected registrations than listed above
- selling points
- no link with professional bodies
- no clearly defined career path
- no College strategic fit

- market saturation
- modules not in line with market requirements/competitor opportunities

Traffic Light accuracy in relation to minimum information standard

Reflective data analysis was carried out on the correlations between the accuracy of traffic light assignment and the amount of programme information provided by the originators. The aim of this analysis was to compare the traffic light status to the quality and quantity of the information provided at the time of the market assessment request. A list of useful information was compiled by SM to allow a score to be calculated for each market assessment. The following items that were deemed as useful to the market assessment process can be found listed in Appendix 3.
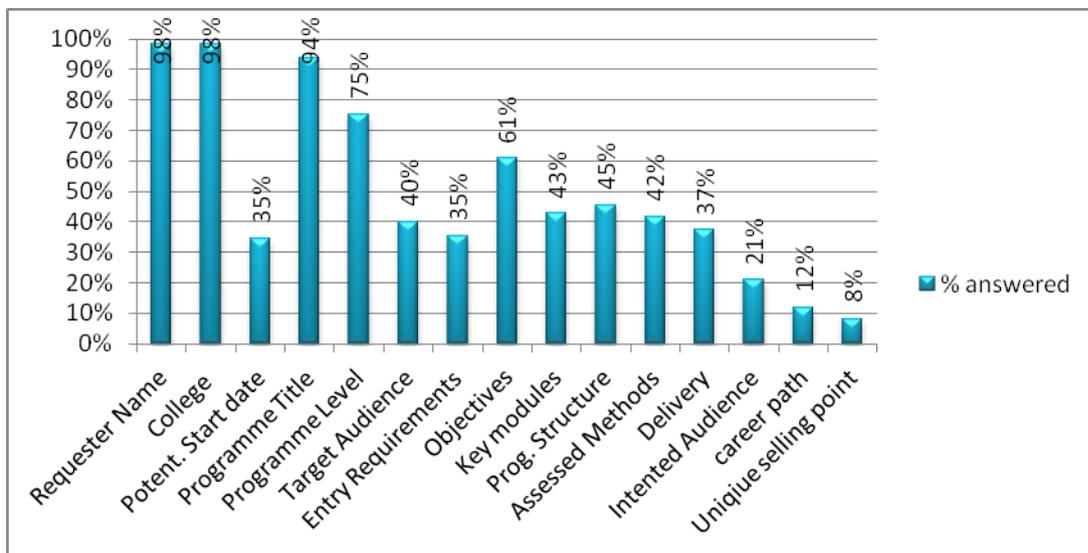
Figure 9: Percentage of market assessment requests that provided each information category (n=110)

Figure 9 shows that almost all of the 110 market assessments sent to SM included the requester's name (n 108), their College (n 108) and the potential programme title (n 103). This was followed by slightly fewer market assessments that included information on the programme level i.e. MSc (n 83) and the programme's objectives (n 67). The information categories that were the least likely to be supplied by the market assessment originator were the programme's intended audience (n 23), any career path associated with the successful completion of the programme (n 13) and the programme's unique selling point (n 9).

The findings were compared with the traffic light status awarded between November 2010 and June 2012.
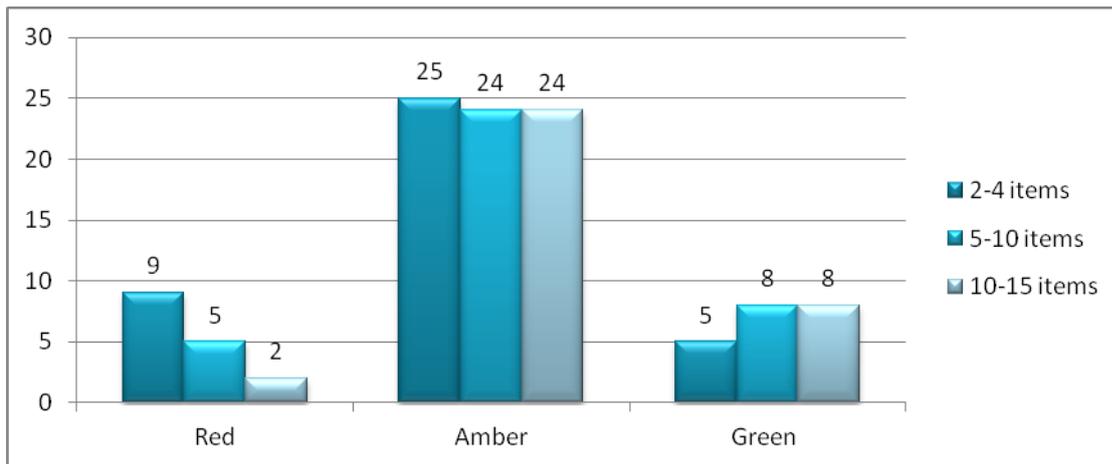
Figure 10: Number of items of information provided for market assessment by traffic light status

Figure 10 shows that the more items of information provided across the noted categories, the more likely the market assessment will be awarded a green status; and more poignantly the less likely the assessment will receive a red status. As part of this analysis it was found that market assessments that included information on the target audience and career path associated with the proposed programme were more likely to be awarded a green status. If the variables of target audience and career path were provided alongside a unique selling point the market assessment was less likely to receive an amber status. The inclusion of information related to a potential programme's provision of these three items helps facilitate a more informative market assessment decision.

Consultations

We consulted with the Senior International Officers, Recruitment and Conversion and Marketing Officers, the Senate Office, EdPSC and the Deans of Graduate Studies and Learning and Teaching.

Consultation with Senior International Officers

The Senior International Officers (SIOs) are issued with detailed programme and statistical data on current market trends and they, in turn, provide market intelligence based on their experience of a particular region. This information relates to areas of recruitment potential in terms of student numbers, types of programmes, changes to travel and work restrictions, funding opportunities and general student feedback.

As part of the review process SM made suggestions on ways that the market assessment process could be streamlined. The SIOs were also asked to comment on the process from their perspective. Clarity around 'new' programmes compared to those that are being re-named/changed would be helpful as there may already be brand awareness around these. Timing, turnaround times and, in some cases, insufficient information were raised as issues of concern.

Consultation with Recruitment Conversion Marketing Officers

Suggestions from the Recruitment Conversion Marketing Officers (RCMOs) included:

- useful to include UK market intelligence as not all programmes will have an international market
- RCMOs would find it helpful to be consulted early when a change of name of a programme is mooted
- RCMOs would welcome specific evidence from SIOs when feeding back on potential markets where possible
- Input from agents and in-country officers would be welcome
- RIO suggested that RCMOs be invited to review proposed programmes at an early stage to ensure College strategic fit and that the s of Learning and Teaching, RCMOs and College Business Development Managers are all copied into the final assessment. This was agreed.

Consultation with the Senate Office
- Senate Office reported that it had been agreed that the market assessment process, which had originally been designed for PGT international assessment only, should cover all programmes
- A suggestion was made that more programmes be submitted through PIP in semester 1 where possible as this round is quieter, it would fit better with the recruitment cycle and spread the market assessment load
- RIO and Senate Office are working together to ensure that their websites complement each other to make the process as clear and simple as possible for users.

Consultation with EdPSC and the Deans of Graduate Studies

A summary of some of major issues raised by EdPSC and the Deans of Graduate Studies are outlined below:

- *It was considered to be important to include some opportunity within the process to refine or change the proposal if a 'red light' was given as much effort would have been wasted.* RIO confirmed that there is scope in the process for Colleges to come back and discuss further refinements if little or no market demand has been identified but it is ultimately up to the College whether to go ahead or not. The PGT market assessment process historically focused on determining whether there may be international market potential for the proposal.

- *The predictive validity of the criteria used in the assessment process was questioned, noting that the level of major errors was around 20% (as described in table 5 of the report). This was thought to call into question the usefulness of either traffic light system. The numbers quoted in Appendix 2 were also questioned as it appeared to indicate that some of the programmes that had been assessed as 'red' had recruited reasonably well. This was contrary to the understanding of the process that proposals categorised as red should not proceed.* RIO confirmed that the focus was on 'international' market potential and 'red' does not necessarily mean 'do not proceed'. This is up to the Colleges to decide. There may be, for example, a home market. It is also simply not possible to predict any market 100%: 80% may be considered to be pretty good? The market assessment forms only one part of the business case and approval process and it is up to the Colleges and Senate Office to use this early 'light touch' market assessment information to determine whether to go ahead or not.

- *Members suggested that the market assessment focus on the recruitment potential of a proposed programme was confusing and that a more nuanced risk assessment approach would be more appropriate.* RIO explained that the process was originally designed to determine any potential international market and reviewing the risk associated with the programme did not form part of the process. Risk assessment would add a complexity to the process which would go against the original 'light touch' and 'quick turnaround' approach.

- *It was considered that the crucial decision in the process concerned the risk involved in the new programme and whether the title might be attractive. Potential recruitment could be irrelevant, for example, where a 'hub and spoke' model was in place allowing different named degree programmes to be offered without any additional teaching requirements. Programmes introduced on a low risk basis could be withdrawn if they did not recruit*

sufficient numbers. In the past SIOs have commented on the hub and spoke aspect of programme potential but this has not been a formal part of the review. RCMOs and SIOs will now be asked routinely to comment on the hub and spoke aspect as part of the process.

- *The process should comment on what competitors were offering and on whether the market had been saturated.* RIO confirmed that a competitor search is done at Scottish, UK and, when resource available, international level as outlined above. RIO also provide HESA data to highlight the size of the market, who the top recruiters are, comment on whether markets are 'busy spaces', provide UCAS data where applicable for new UG programmes, UoG application data and university ranking information.

- *The channels of communication with RIO could be improved by representation at Directors of Graduate Schools and College meetings.* RIO is currently represented by Admissions but there could be scope to extending RIO representation at these meetings.

- *There was also concern raised around the utilisation of options between degrees, which can give a false picture.* This can often be difficult to determine when reviewing individual programmes, however, RIO will be involved in PGT programme reviews with the Colleges and it is hoped that some consideration can be given to this issue during these reviews.

Conclusions and Next Steps

On the basis of the findings above, the market assessment process is being redefined and updated with the following provisions:

1. **Minimum Information Standards**: originators/Colleges will be required to provide better/more detailed information in some cases before the opportunity is assessed. New v existing programmes to be highlighted from the outset. A clearly outlined standard method and range of information that is required from the Colleges will be available. See suggested online pro forma in Appendix 3 and market assessment request form Appendix 4. Better quality information will assist with the assessment of these opportunities.

2. **Timing**: it is recommended that, where possible, Colleges aim to submit more market assessment requests during June – August for the Semester 1 round of programme approvals via the PIP process to tie in better with the recruitment cycle. The aim will be to return market assessments within 10 working days of receipt of all necessary information.

3. **Strategic fit**: RIO will ask the RCMOs to confirm strategic fit with College priorities/Heads of Schools and provide RCMOs with information on requests for programme name changes at an early stage. RCMOs can provide comments on the hub and spoke programmes in terms of the low cost and shared risk design.

4. **All programmes**: to be included in the market assessment process.

5. **UK market**: RIO to consider the possibility of including UK potential markets in the assessments.

6. **Evidence-based**: where possible, evidence-based market intelligence to be provided by SIOs and input from agents and in-country officers.

7. **Traffic light status**: Assignment of the traffic light will be made against the criteria outlined above to reach 'green', 'amber' or 'red' status.

8. **Websites**: both RIO and Senate Office websites are being reviewed to ensure that they complement each other and provide the necessary information to make the process simple to use.

9. **Hub and spoke and utilisation of options between degrees**: RCMOs and SIOs will now be asked routinely to comment on the hub and spoke aspect as part of the process and consideration to be given to utilisation of options between degrees as part of the PGT programme review process.

10. **RIO representation at DoGS and College meetings**: should be reviewed.

Prepared by:

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Bibliography

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The NEW market assessment template

RIO MARKET ASSESSMENT –			
QUERY			
ORIGINATOR			
Americas			
Europe			
Middle East and Africa			
Eurasia & South Asia			
South East Asia			
East Asia			
UK*			
RCMO*			
PROGRAMME SEARCH – SCOTLAND			
Institution	Programme Description		
PROGRAMME SEARCH – UK			
Institution	Programme Description		
OTHER NOTES			
ASSESSMENT OF OPPORTUNITY			
Author	Contact	ext. 7500	

●   No market potential identified

●   Market potential identified

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* New addition to process

Applications and recruitment data for each assessed programme by College

Assessment Name	College	Assessment Date	Recommendation	2009 Apps Int.	2009 Apps Total	2010 Apps Int.	2010 Apps Total	2011 Apps Int.	2011 Apps Total	2012 Apps Int.	2012 Apps Total	Recruit. Result Int 11/12	Recruit. Result Int 12/13	Overall Recruit Total (2012 cycle)
PGT CRIME, JUSTICE, SECURITY	CoSS	Sep-10	(yellow)	---	---	---	---	4	9	8	24	0	2	9
MSc Health/Global Health	CoSS	Oct-10	(yellow)	---	---	---	---	5	5	21	27	---	2	4
MSc Automotive Engineering	CoSE	Oct-10	(yellow)	---	---	---	---	129	138	124	127	4	1	1
MSc in Chemistry	CoSE	Oct-10	(red)	---	---	11	12	40	45	50	54	1	1	1
MSc in Chemistry with Medicinal Chemistry	CoSE	Oct-10	(red)	---	---	2	3	38	42	54	61	2	1	6
MSc in Signal Processing, Computation Techniques for Researching and Understanding Music (SPECTRUM)	CoSE	Oct-10	(yellow)	---	---	10	12	12	12	4	4			0
MSc in Applied Mathematics/Mathematics	CoSE	Oct-10	(yellow)	74	86	73	82	58	70	52	64	2	1	5
MSc in Physics: Energy and the Environment	CoSE	Oct-10	(yellow)	---	---	3	7	13	18	56	62	1	1	2
MSc in Physics: Advanced Materials	CoSE	Oct-10	(red)	---	---	4	5	15	18	39	44	1	1	2
MSc in Physics: Life Sciences	CoSE	Oct-10	(yellow)	---	---	1	1	4	5	15	16	1	N/A	0
MSc in Physics: Global Security	CoSE	Oct-10	(yellow)	---	---	1	1	2	3	5	5	0	N/A	0
MSc in Astrophysics	CoSE	Oct-10	(red)	---	---	4	7	14	21	28	32	1	1	3
MSc in Theoretical Physics	CoSE	Oct-10	(red)	---	---	6	6	11	15	20	25	2	2	3
MSc/MLitt Museums & Materials	CoA	Oct-10	(green)	2	10	2	6	8	12	9	25	2	0	5
MLitt Interdisciplinary Cultural Criticism	CoA	Oct-10	(yellow)											0
MSc Animal Reproduction	MVLS	Oct-10	(yellow)	---	---	---	---	2	4	2	5			0
MSc Sustainable Energy	CoSE	Nov-10	(green)	---	---	---	---	73	100	96	132	3	4	7
MSc Ancient Chinese Ethics	CoA	Nov-10	(red)											0
MSc in the Global Economy	CoSS	Nov-10	(green)	---	---	---	---	15	21	63	72	3	8	13
MSc Global Security	CoSS	Nov-10	(yellow)	---	---	---	---	12	34	22	57	0	1	15
LLM International Law and Security	CoSS	Nov-10	(green)	---	---	---	---	17	35	41	65	3	2	12
MLitt Irish and Scottish Studies	CoA	Nov-10	(red)	---	---	---	---	2	10	4	14	0		0

Programme	College	Date	Status											
Master in Public Administration (MPA)	CoSS	Nov-10	🟩											0
MLitt International Cinema	CoA	Nov-10	🟩	---	---	---	---	2	7	2	5	0		0
MSc Global Inequalities and Social Justice	CoSS	Nov-10	🟧											0
MLitt Scottish Studies Global	CoA	Nov-10	🟧											0
MSc Gender Studies	CoSS	Nov-10	🟥											0
MLitt Translation (Studies)	CoA	Nov-10	🟩	---	---	---	---	---	---	19	60	N/A	0	15
MLitt Transculturality (Europe and its Cultural Interfaces)	CoA	Nov-10	🟥											0
MSc Museum Matters Dress & Textile Histories	CoA	Nov-10	🟧	---	---	---	---	---	---	1	4		1	2
MLitt Art History Dress & Textile Histories	CoA	Nov-10	🟧	---	---	---	---	2	6	10	16	1	4	9
LLM Intellectual Property and the Digital Economy	CoSS	Nov-10	🟩	---	---	---	---	20	37	46	67	1	2	7
MSc Music in Historically Informed Performance Practice joint with RSAMD	CoA	Nov-10	🟧	---	---	---	---	1	2	2	7	0	1	3
MSc in Aeronautical Engineering with Rotorcraft Technology	CoSE	Nov-10	🟩											0
MSc Embedded Systems	CoSE	Nov-10	🟧	---	---	---	---	50	56	98	100	2	3	3
MSc Geomatics and Management	CoSE	Nov-10	🟩	---	---	---	---	7	9	17	19	N/A	N/A	0
MSc in Aquatic System Science	CoSE	Nov-10	🟧	---	---	---	---	1	4	17	20	N/A	1	2
MSc in Freshwater System Science	CoSE	Nov-10	🟧	---	---	---	---	2	5	14	16	1	N/A	0
MSc in Coastal System Management	CoSE	Nov-10	🟧	---	---	---	---	3	8	9	12	0	0	2
MSc in Marine System Science	CoSE	Nov-10	🟧	---	---	---	---	4	11	13	17	0	0	2
MSc in Science for International Development (Health)	CoSE	Dec-10	🟧	---	---	---	---							0
MSc in Science for International Development (Environment)	CoSE	Dec-10	🟧	---	---	---	---	2	6	3	3			0
MSc in Space Systems Engineering	CoSE	Dec-10	🟧	---	---	---	---	22	30	5	6	2		0
MSc in Mechatronics	CoSE	Dec-10	🟧	---	---	---	---	37	39	128	140	1	0	4
MSc in Engineering Sustainable Water Resources	CoSE	Dec-10	🟧	---	---	---	---	8	13	11	14			0
MSc in Statistics	CoSE	Dec-10	🟧	---	---	---	---	22	40	81	97	0	1	1
MSc with Medical Statistics	CoSE	Dec-10	🟧	---	---	---	---	13	18	18	26	1	1	2
MSc in Statistics with Environmental Statistics	CoSE	Dec-10	🟧	---	---	---	---	7	10	43	46		2	2

Programme	College	Date	Status											
MSc in Statistics with Social Statistics	CoSE	Dec-10	yellow	---	---	---	---	2	2	7	10	N/A	N/A	0
MSc in Financial Mathematics	CoSE	Dec-10	yellow											0
MSc Animal Welfare Science, Ethics and Law	MVLS	Dec-10	yellow	---	---	---	---	4	8	16	31	1	3	10
MSc Biodiversity Measurement and Informatics	MVLS	Dec-10	yellow	---	---	---	---	2	5	---	---	0		0
MSc Quantitave Skills in Applied Ecology, Epidemiology and Conservation Biology	MVLS	Dec-10	yellow	---	---	---	---	2	5	1	1	0	0	5
M.Res. in Brain Sciences: From Molecules to Mind	MVLS	Dec-10	yellow	---	---	---	---	8	20	15	40	0	1	7
Mlitt in RELIGION, THEOLOGY AND CULTURE	CoA	Dec-10	yellow	---	---	---	---	23	28	19	26	4	0	6
MLitt Charles Rennie Mackintosh, Glasgow and International Art Nouveau	CoA	Dec-10	yellow	---	---	---	---	12	17	4	4			0
MSc in Applied Medical Science	MVLS	Dec-10	green	---	---	---	---	5	8	24	30	0	0	1
MLitt CULTURES, SOCIETIES AND LANGUAGES:EUROPE AND LATIN AMERICA	CoA	Dec-10	yellow	---	---	---	---	6	21	12	22	1	0	2
M.Res in Creative Practice in FTV	CoA	Dec-10	green											0
MSc Sports and Exercise Medicine	MVLS	Jan-11	yellow	50	75	26	50	19	33	28	50	1	1	16
MSc in Sport and Exercise Science	MVLS	Jan-11	yellow	---	---	---	---	4	18	19	43	1	1	9
MSc Diabetes	MVLS	Jan-11	yellow											0
MSc Diabetes and Endocrinology	MVLS	Jan-11	yellow											0
MSc Cardiovascular Practice	MVLS	Feb-11	yellow	---	---	---	---	3	5	13	14			0
MSc Evidence based Medicine & Education	MVLS	Feb-11	yellow										0	5
MSc/PGDip Animal Ecology, Conservation and applied Behaviour	MVLS	Feb-11	yellow											0
Mres Comparative Medicine	MVLS	Feb-11	yellow	---	---	---	---	0	4	---	---	0		0
MSc Crop Biotechnology	MVLS	Feb-11	yellow	---	---	---	---	1	5	14	15	0	0	1
double degree IMRCEES	CoSS	Feb-11	yellow	19	23	4	8	10	23	171	213	4	18	29
MSc in City Planning and geoinformatics	CoSS	Feb-11	yellow											0
Mlitt translation and international education	CoA	Feb-11	green											0

Programme	College	Date	Status											
MSc international business and economic development	CoSS	Mar-11	green	---	---	---	---	28	32	92	107	N/A	N/A	0
MSc in Low Budget Video Production	CoA	Apr-11	green											0
MSc in Governance and Accountability	CoSS	Apr-11	green	---	---	---	---	---	---	188	195	N/A	21	22
MSc Software Development	CoSE	Apr-11	green	---	---	---	---	27	43	69	83	3	2	8
MLitt Theatre Studies	CoA	Apr-11	yellow	---	---	---	---	---	---	2	3	N/A	N/A	0
MLitt Theatre History	CoA	Apr-11	yellow	---	---	---	---	---	---	2	5	N/A	1	3
MLitt Theatre Practices	CoA	Apr-11	yellow	---	---	---	---	---	---	1	1	N/A	N/A	0
MLitt Theatre Industries	CoA	Apr-11	yellow											0
MSc landscape Research, Practice & Policy	CoA	Apr-11	red	---	---	---	---	---	---	6	10		1	4
MSc Functional Foods & Health	MVLS	Apr-11	yellow											0
MSc International management in china	CoSS	May-11	red	---	---	---	---	4	8	83	97	N/A	4	5
MLitt English Languages and Linguistics - applied	CoA	May-11	yellow	---	---	---	---	---	---	29	36	1	3	6
MLitt Medical Humanities: Arts, Histories and Cultures	CoA	May-11	yellow											0
MSc video technology and production	CoSE	Jun-11	yellow											0
EdD with specialisation in Educational Leadership	CoSS	Jun-11	yellow										20	28
MSc Dental Public Health	MVLS	Jul-11	green											0
MRes/MSc Immunity and Infection	MVLS	Jul-11	yellow	---	---	---	---	1	1	77	114		7	22
MSc International Mental Health and recovery	MVLS	Jul-11	red					---	---	7	23			0
MSc Global Mental Health	MVLS	Jan-12	yellow	---	---	---	---	---	---	---	---		2	11
MSc Biomedical Engineering	CoSE	Sep-11	green											0
MSc Medical Imaging	CoSE	Sep-11	yellow											0
MLitt English Language Studies Oman	CoSS	Aug-11	yellow	---	---	---	---	---	---	0	3		N/A	0
MSc Innovation and creativity	CoSS	Sep-11	yellow											0
MSc Environmental Science, Technology and Society (E-STS)	CoSS	Sep-11	yellow	---	---	---	---	---	---	15	19		N/A	0
MLitt in Environmental Culture and Communication.	CoSS	Sep-11	yellow	---	---	---	---	---	---	1	6		N/A	0

Programme	College	Date	Status											
MSc Environmental Education and Communication	CoSS	Oct-11	Red											0
MLitt Music and Screen Media	CoA	Nov-11	Amber											0
MSc (Dent Sci) Endodontic	MVLS	Dec-11	Amber	---	---	---	---	---	---	30	32			0
MSc in Health Technology Assessment	MVLS	Nov-11	Red											0
MSc in Health Technology Assessment reassessed	MVLS	Dec-11	Amber										N/A	0
MSc in Nanoscience & Nanotechnology	CoSE	Dec-11	Green	---	---	---	---	---	---	23	26		4	5
History programmes	CoA	Dec-11	Amber	10	41	17	38	13	28	22	53		3	14
MSc in Information Management Forensics	CoA	Dec-11	Amber	---	---	---	---	---	---	5	7		0	1
professional practice' programmes	CoSS	Jan-12	Amber											0
MSc TESOL	CoSS	Jan-12	Amber	---	---	---	---	---	---	39	44		10	10
MSc Advanced Community Development (online)	CoSS	Jan-12	Amber										N/A	0
MSc Drug and Alcohol Studies	CoSS	Mar-12	Red	---	---	---	---	6	53	8	78		2	18
European Master Globalisation, Corporate Responsibility and Law [LLM]	CoSS	Jun-12	Orange											
three year LLB LLM	CoSS	Jun-12	Green											

RIO market assessment webpages

Time scale

Generally speaking, we aim to complete an assessment in a week for a standard programme proposal. In some cases, it may take longer when the request is more complicated, e.g. multiple programmes are involved. Occasionally it might be delayed when the International Officers are travelling abroad, and the RIO SM team is responding to other deadlines.

When planning the programme approval, please allow enough time for the market assessment. See Senate Office Programme Approval Timetable 2013-14.

Information required

In order for us to carry out accurate assessments, please provide as much programme detail as you can in the following areas:

- Programme Title
- Programme Level i.e. MSc
- Potential start date
- Entry Requirements
- Intended Audience
- Aims/Objectives
- Key modules
- Programme structure and features
- Assessment methods e.g., dissertation
- Delivery i.e. full-time, part-time, on-line etc.
- Career path potential for the student
- Unique selling point

Good practice guide

You may wish to refer to some of the good practices recommended by an innovation in the Market Assurance of new Programmes (iMAP) Project. For example, programmes:

- were innovative and captured the market's imagination
- exploited new technological areas appealing to young people
- delivered by internationally-renown academic leaders
- will build on collaboration internationally, and/or across disciplines
- have links with industry and employers
- be accredited by professional bodies

Source to be web linked:
iMAP Guidance Report 2012
iMAP Conference PGT Portfolio Key Considerations
i-MAP Conference Data Analysis: Critical Evidence of Failure and Success
iMAP Conference Portfolio Management: A Critical Business Process. Ten Lessons

Market assessment request form

Market Assessment Request

In order for us to carry out accurate assessments, please provide as much programme detail as you can in the following areas:

Potential Programme Start Date:

Requester Name:

Phone:

College:

Programme Title:

(new or existing?)

Programme Level (i.e. MSc):

Target Audience:

☐ Home/EU students ☐ International students ☐ Both

Entry Requirements:

Programme Details

A. **Objectives:** General description of the proposed programme aims? What does this programme offer potential students?

```

```

B. **Key Modules:** Please outline the key modules/learning outcomes?

```

```

C. **Programme Structure and Features:**

```

```

D. **Assessment Methods:** Please outline the number and type of assessments i.e. dissertation?

```

```

E. **Delivery:** i.e. full time 1 year, part –time 2 years, on-line components?

```

```

F. **Intended Audience**: What do we need to tell our target audience?

<div style="border: 1px solid black; min-height: 150px;"></div>

G. **Career path potential for the student:** What jobs/markets could this qualification lead the student into?

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H. **Unique selling point:** What sets this programme apart from similar courses at competitor institutions'?

<div style="border: 1px solid black; min-height: 150px;"></div>

Strategic Marketing Office Use only:

Date Request Received: _____

Any Requests for further information from originator?

(Please provide details):

Projected completed Date: _____