

Tuition Fee and Course Supply

Key Insights

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Insights from analysis of Tuition Fees Benchmarking Tool. December 2019

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This comprehensive database of UK courses and associated postgraduate, international and distance learning tuition fees allows The Knowledge Partnership to deliver powerful insights which will help benchmark the performance of your university.

Tuition Fee trends

1. International fees have risen between 3-5% a year (on average) for the past 4 years.
2. BSc courses carry a premium fee of +5% over BA or LLB (this probably reflects the nature of study, not the award label).
3. The gap in international student fees charged by Russell Group universities compared with others has been widening.
4. The explosion in PGT fees growth may be at an end. An average MA fee for an international student in 2019/20 is 3% down on the previous year. The rate of growth for other courses was also lower.
5. At PGT level, Education, Engineering & Technology and Mathematical Sciences saw the largest increases in international fees from 2016 to 2019 of between 17% and 20%.
6. London universities typically set higher PGT fees than those in other parts of England and those in other countries of the UK are on average lower still (exceptions are evident). This variance is closing as fees in London increased less rapidly than elsewhere in the UK.
7. PGT distance learning course fees have been increasing at a higher rate over the past 4 years than on-campus courses.
8. Not surprisingly MBAs command the highest distance learning fees at PGT level; overwhelmingly a single fee is charged with no differential for UK, EU or international.

The full powerpoint deck will be supplied free to fees clients in the New Year.

Course Supply Trends

Any analysis of a market must cover supply as well as demand and we can use the Tuition Fees database to provide a valuable and comprehensive record of trends in what's new and what's been withdrawn for PGT distance learning/online and UG courses. We will be launching a **Course Supply Tracking Tool** early in 2020 but to give you an introduction here are some of the emerging insights we have found.

1. The rate of churn across the modern universities (the number of 'new' and 'withdrawn' programmes as a proportion of the portfolio) is much higher than that of established universities.
2. At undergraduate level the average UK HEI withdrew 5 courses and added 4 courses (excluding joints and combos) in 2019/20 so supply shrank.
3. On average, UK HEIs withdrew 9 and added 11 PGT courses in 2019/20. There are two probable drivers for expansion - the PG loans becoming embedded and the financial need to attract more international fee-paying students.
4. Many more MSc programmes (895 53% of the total) were launched than MA programmes (370) reflecting both the subjects that are being developed and the belief that an MSc award is more appealing to overseas students.
5. UK HEIs withdrew an average 4 courses within distance learning PGT and replaced them with 4 new programmes in 2019/20; there was minimal net increase in supply during the year.

More details are available by institution group, subject area etc and will be available as a new product in 2020.

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