

# QS Insights for Impact

Presented by:

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# Agenda



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30+ years of experience as thought leaders in the educational sector



We've built close relationships with over 1,500 institutions

QS World University Rankings

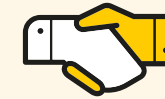
- Integrated careers workshops across all programmes
- Dedicated postgraduate careers advisor, with subject specific experts
- Employer events, conferences and visits
- Links to international employers
- Regular drop-in clinics and workshops

QS International Student Survey

TopUniversities.com



Student connections



Partnership management



Enrollment solutions



Conferences

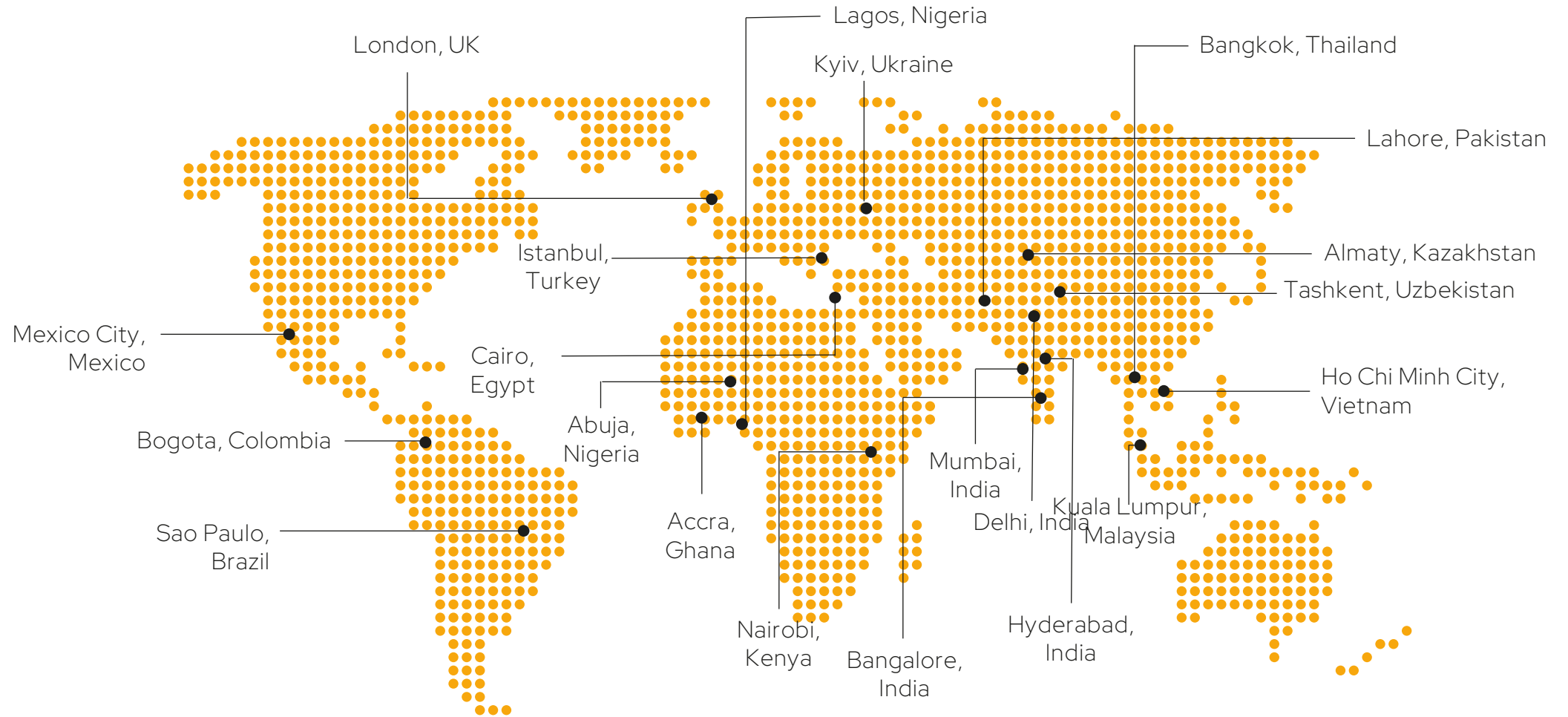


Analytics

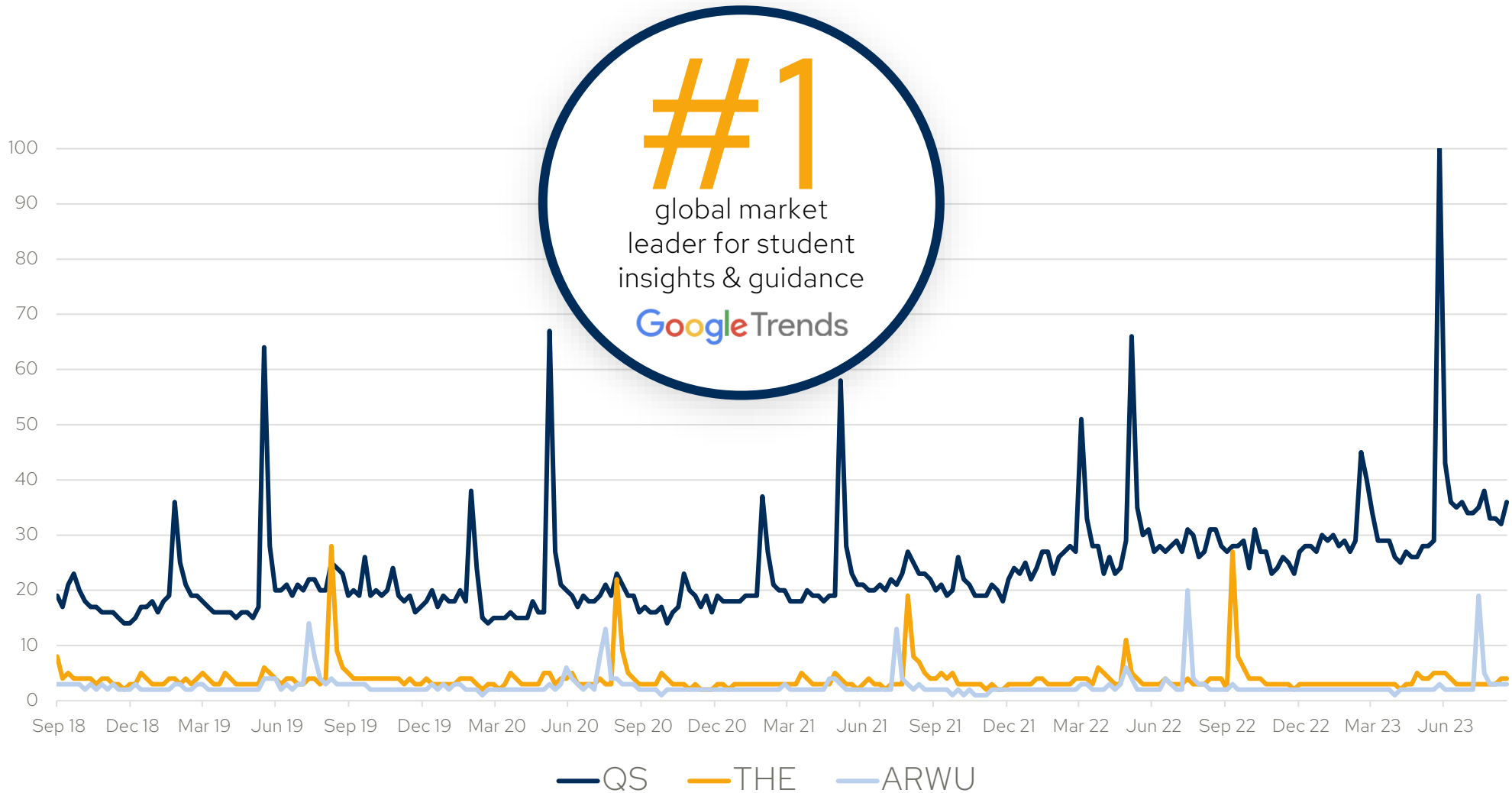


Consulting

# QS Global Presence







**18m**

18m pageviews within one week of launch

**8.1m**

8.1m pageviews within 36 hours, a 306% increase year-on-year

**Top 10**

Australia, UK, USA, India, China, Canada, Hong Kong, Singapore, Italy, Malaysia

**163**

Number of countries our traffic came from



What does the current HE  
landscape look like?

# United States

International enrolments in 2021/2022

948,519

Jobs supported by international students

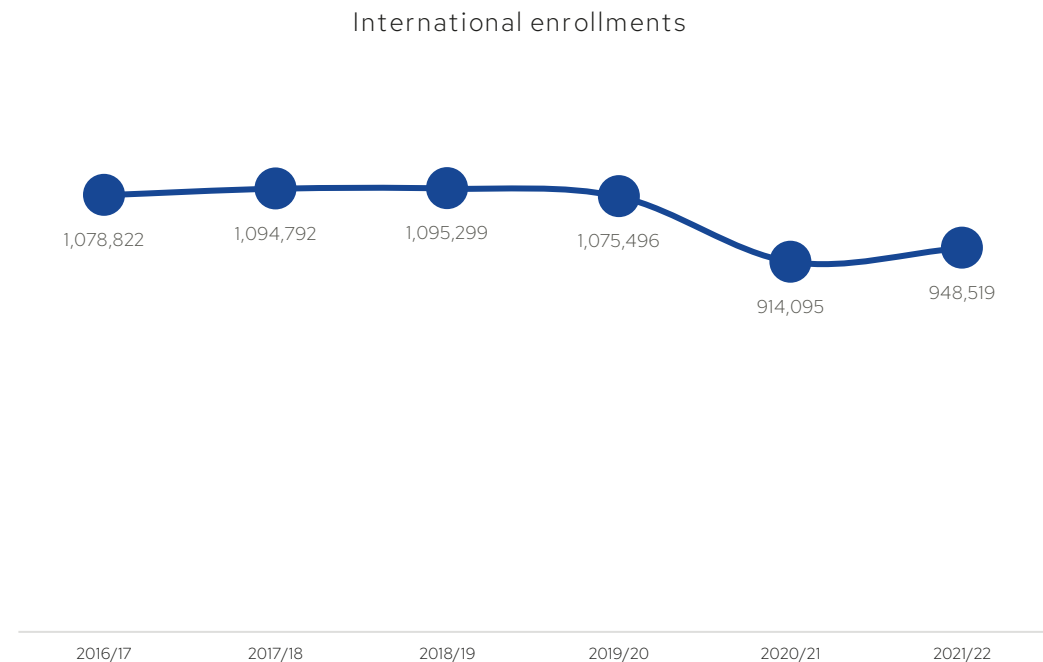
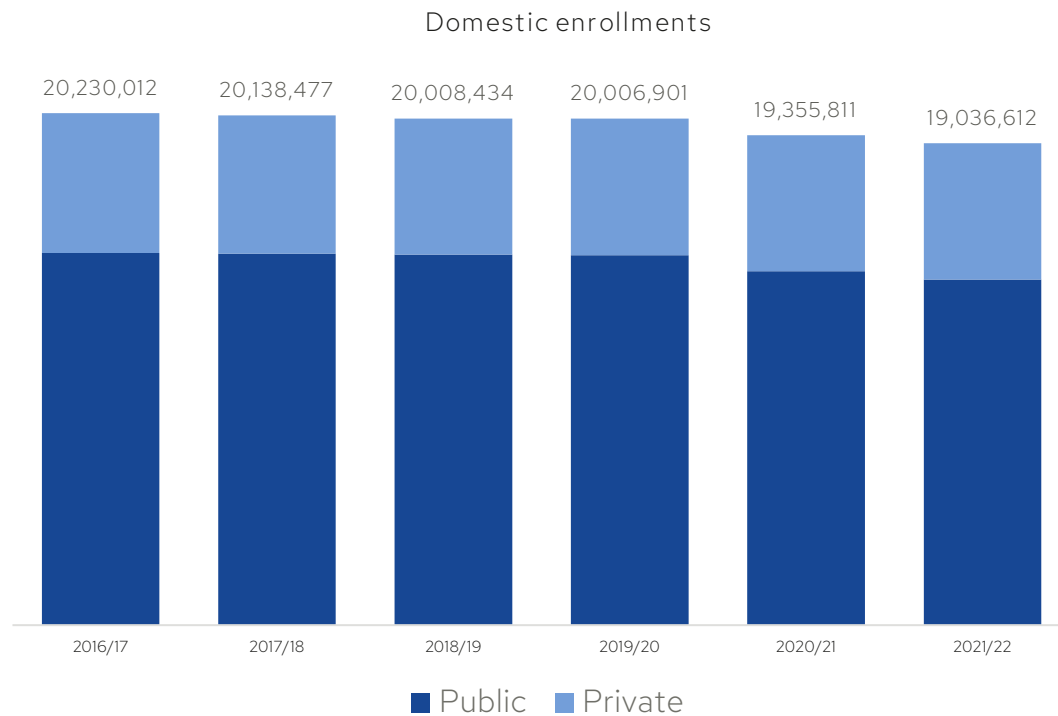
335,423

Contributed to the US economy

\$33.8bn

# Recruitment Moving Forward

With a backdrop of declining domestic enrollments

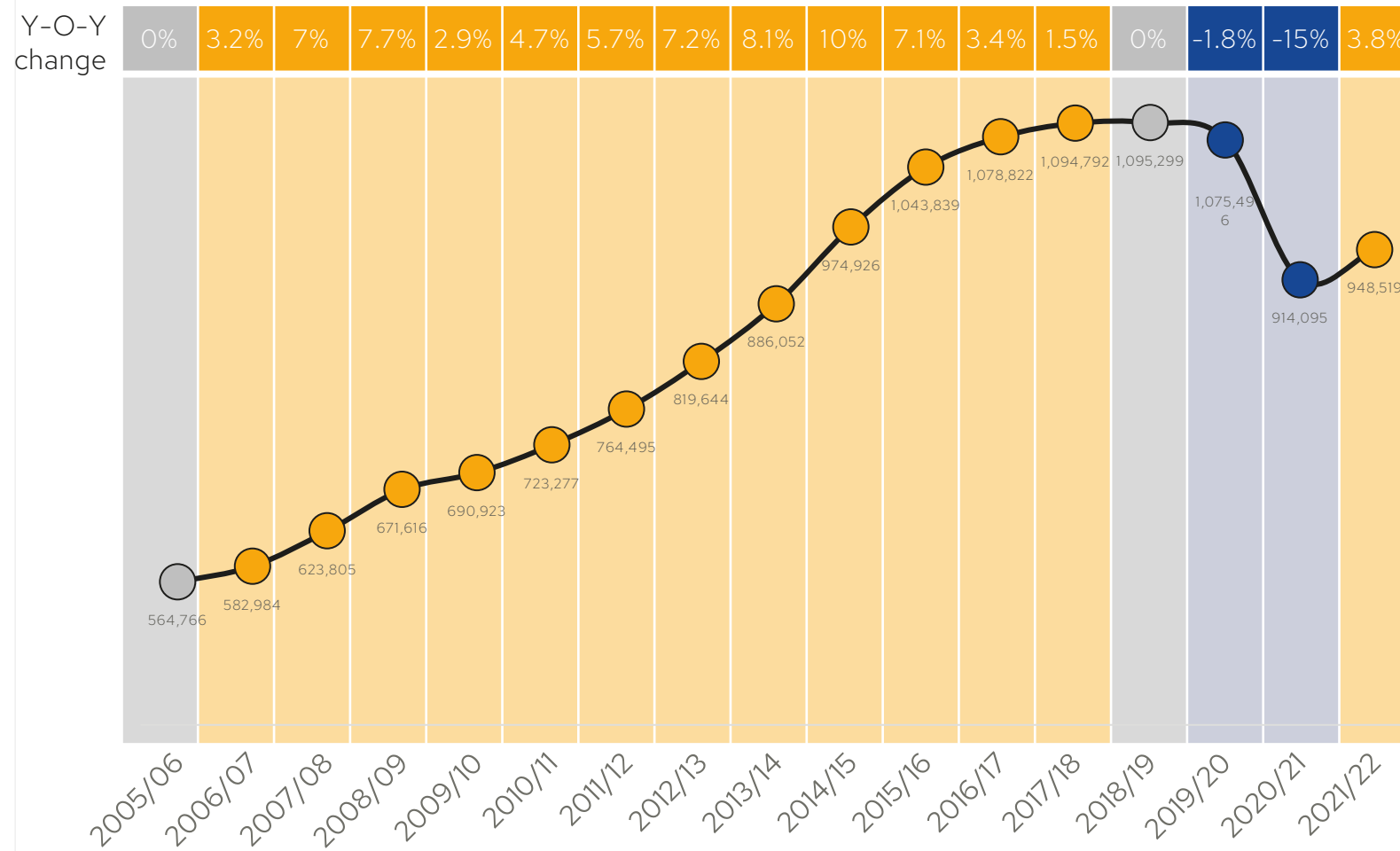


- 970,289 fewer domestic enrolments in 20/21 compared to 19/20.
- Most of this decline can be attributed to a drop in enrolments in public institutions\*

- International enrolments have rebounded in 2021/22, in contrast to domestic enrolments

# The market is ready to recover with favorable post-study work rights

International student numbers re-bounded by over 30k in 2021/2022, reversing a declining trend observed in the two years prior to this



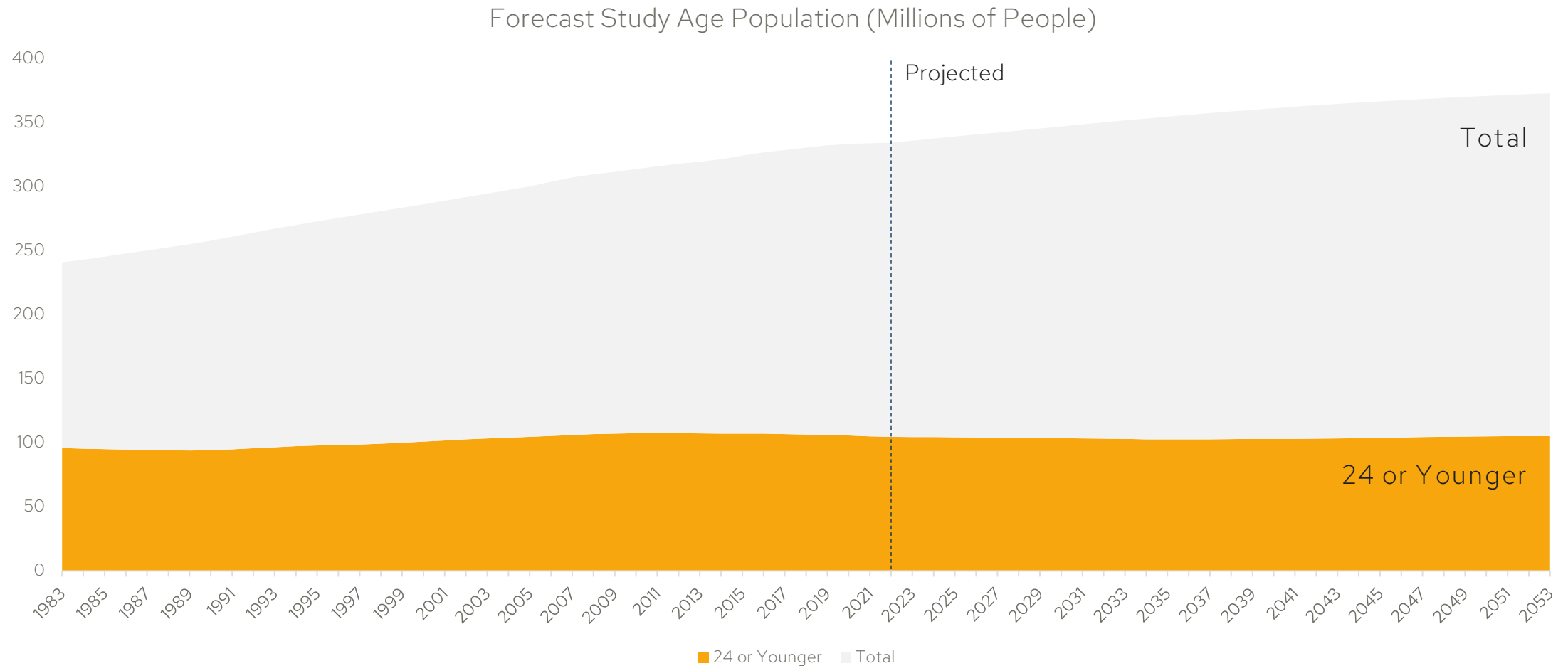
▶ International enrolments nearly doubled between 2006 and 2017

▶ The growth rate in enrolments in 2022 is the strongest since 2016

▶ There has been a strong rebound since the pandemic

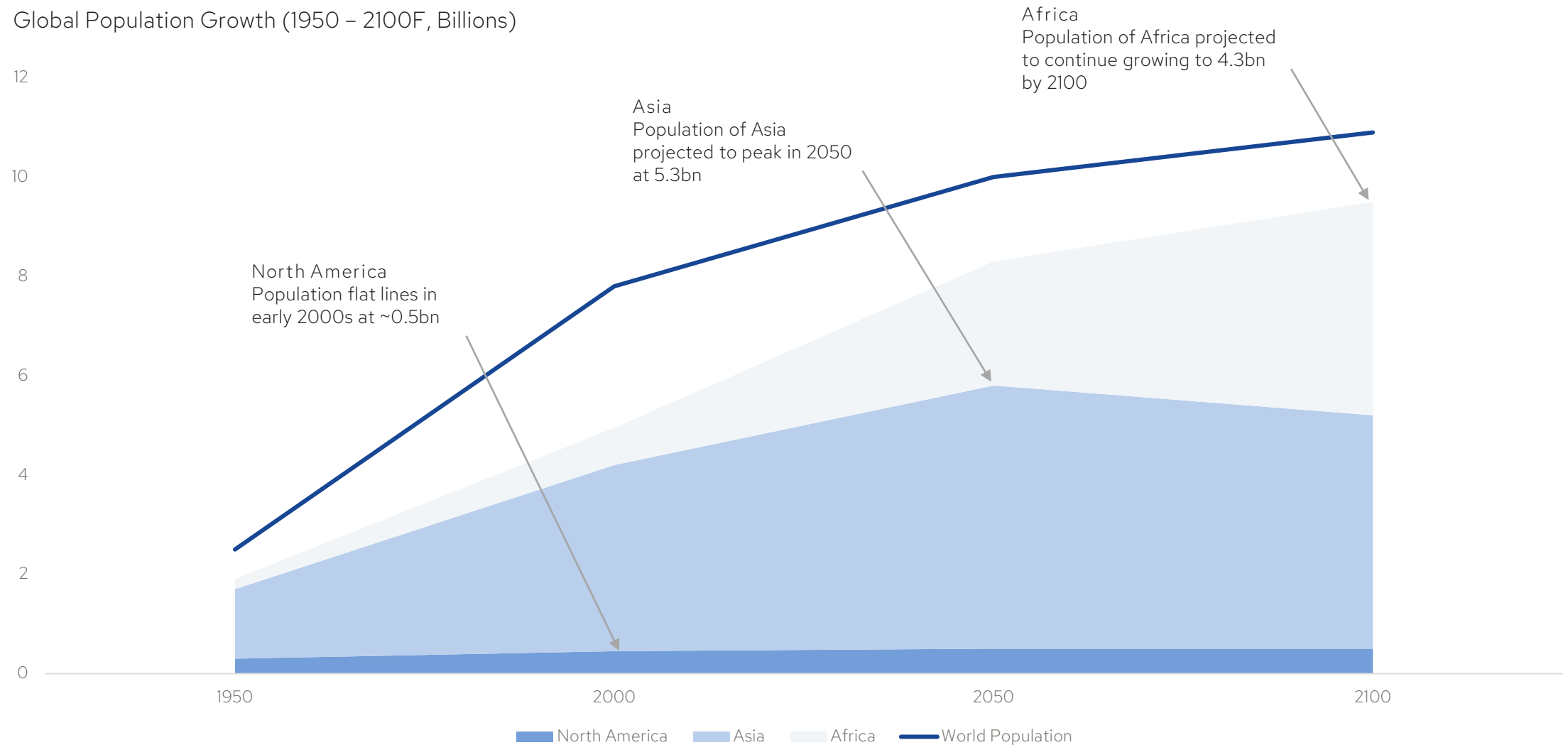
# The CBO forecast a flat-line study age population for the next 25 years

US study-age population has been on a marginal decline since 2015



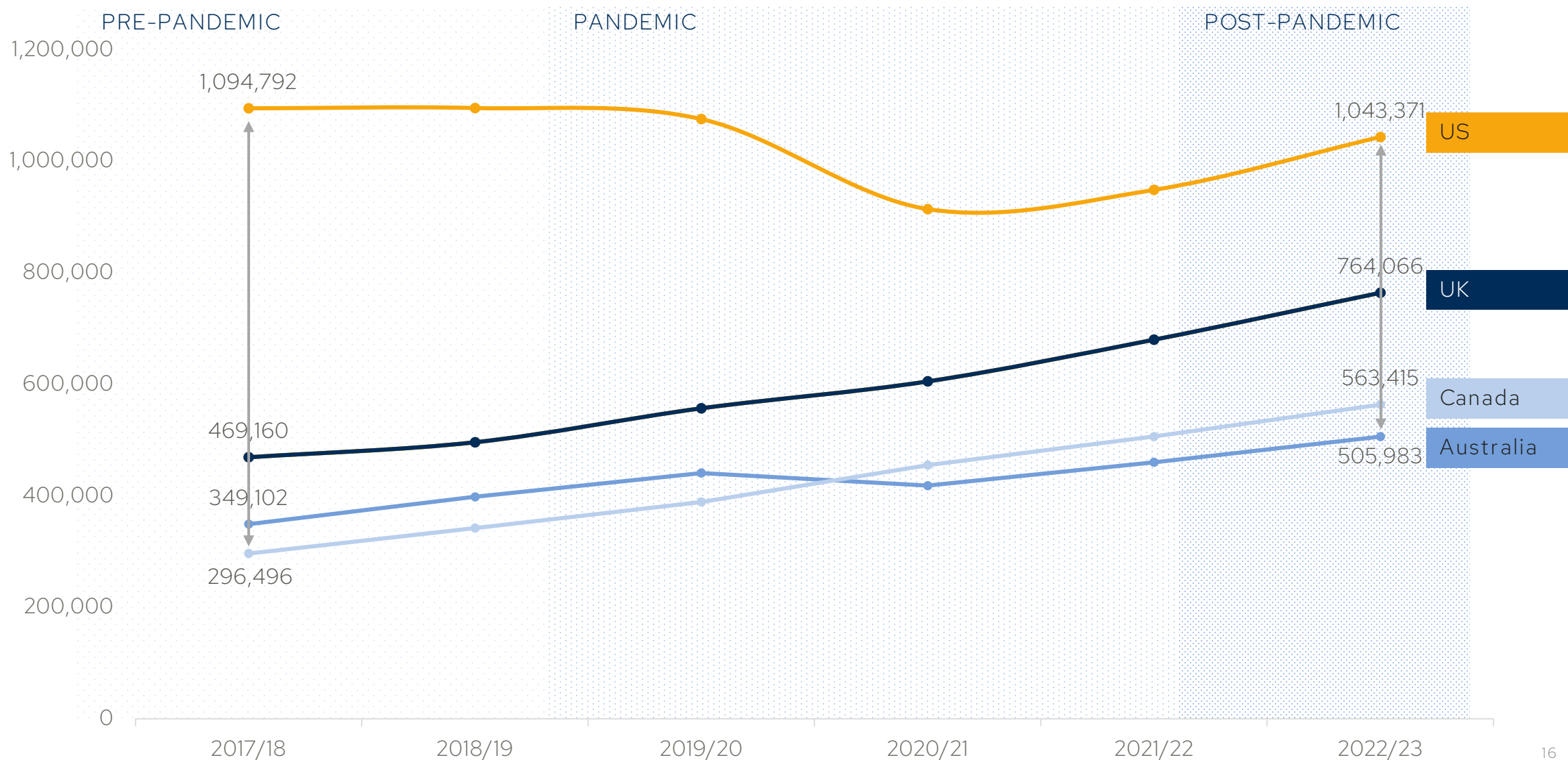
# Supported by a continued global population growth

Global Population Growth (1950 – 2100F, Billions)



# Global competition for international students is going to intensify

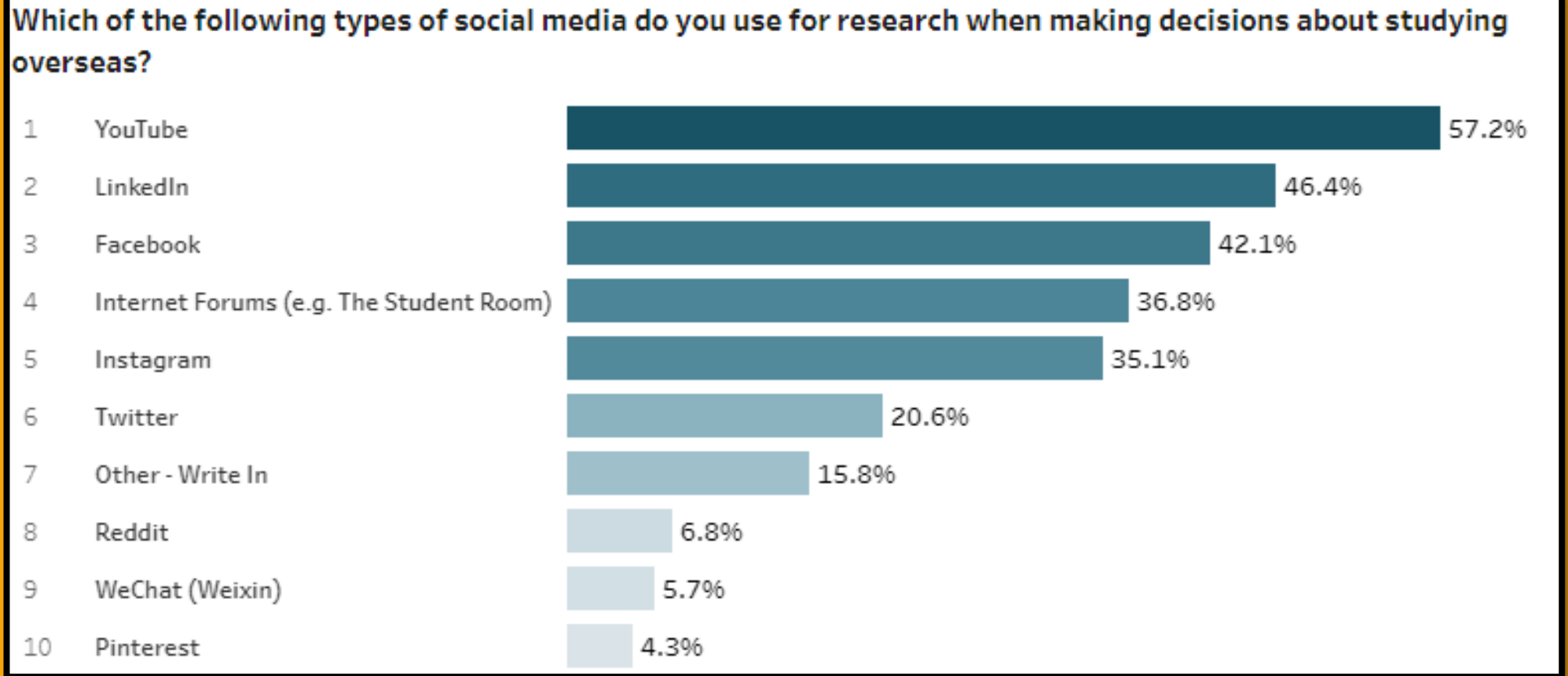
The gap between the big four has closed by over 250k students in 5 years



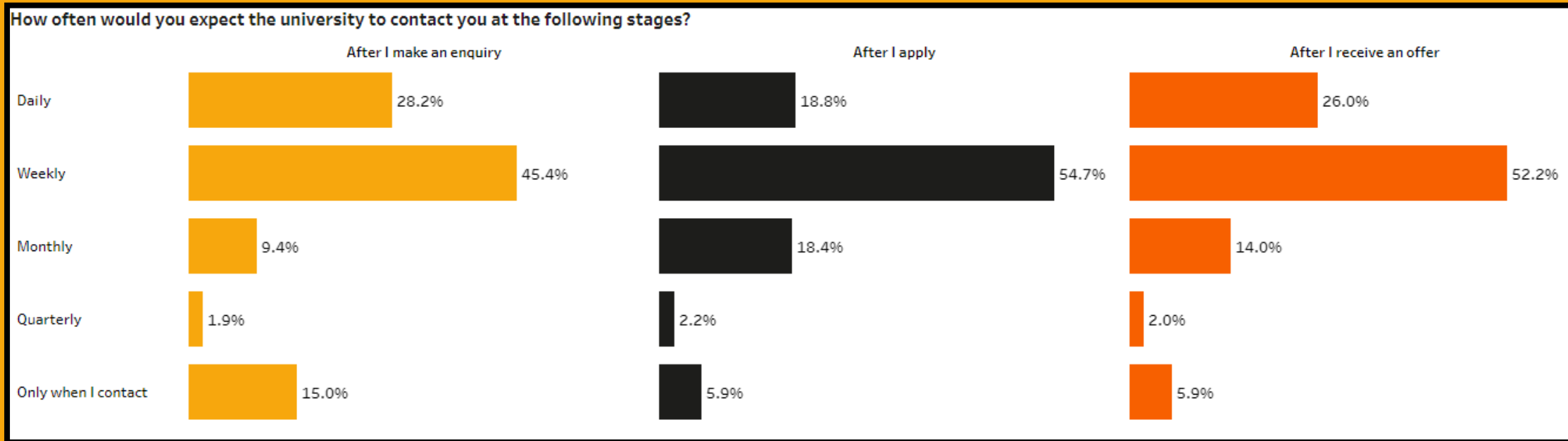


# Domestic Insights

# Meeting The Market Where They Are

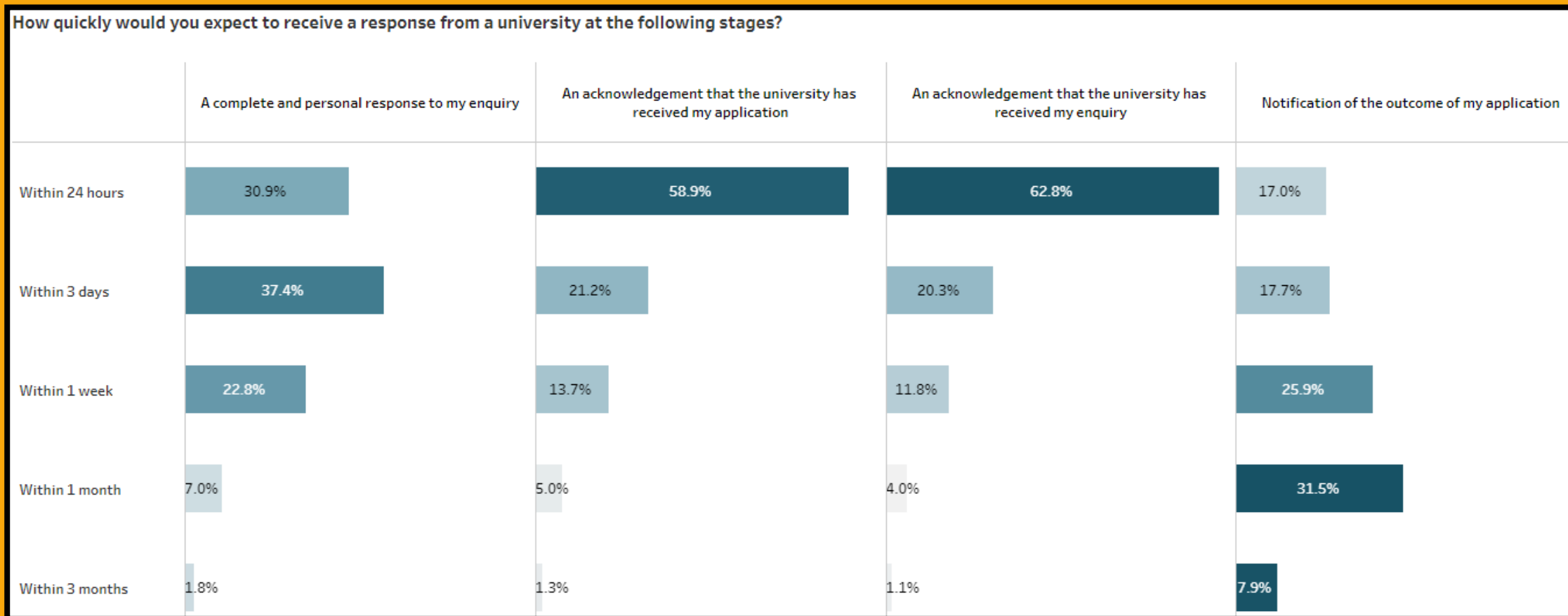


# Communication Demand



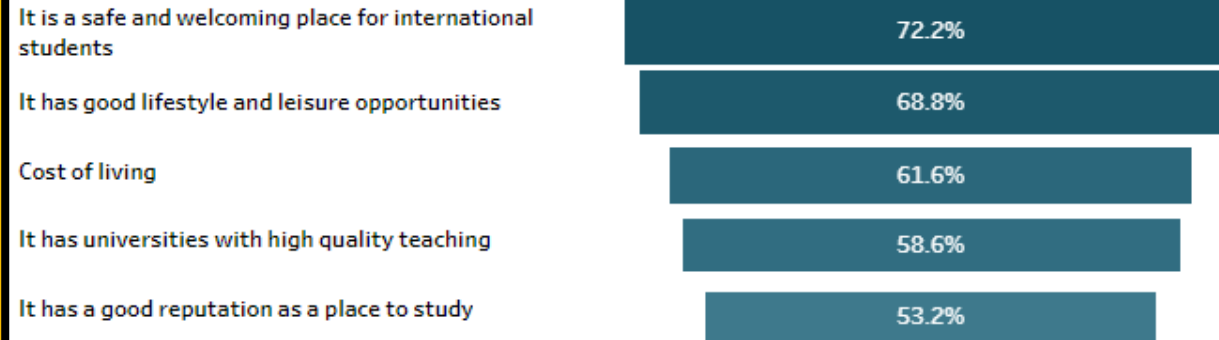
# Communication Demand

Source: QS International Student Survey 2022



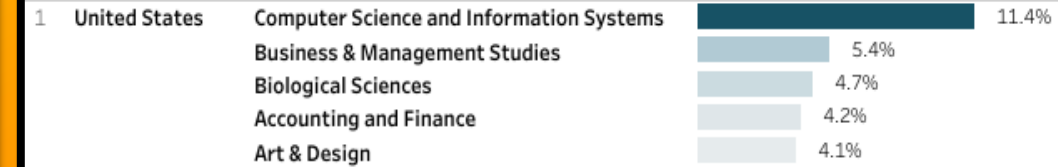
# Decision Making

What five things are most important to you when choosing a town or city to study in?



Top 5 subjects by pageviews for the 5 top destinations of United States

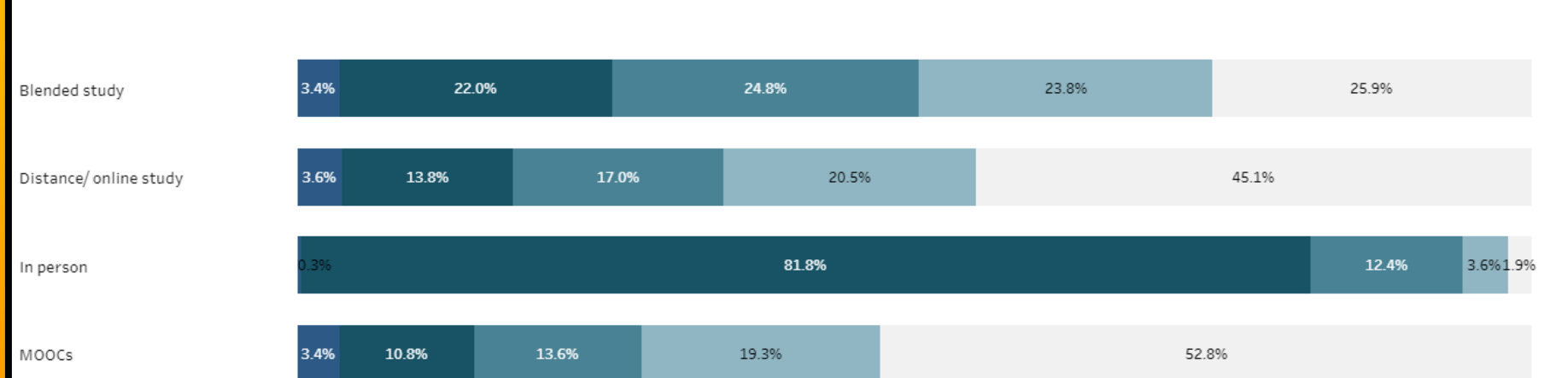
Select country to highlight on the line chart on the right



Select question

☒ How interested are you in the following delivery options?

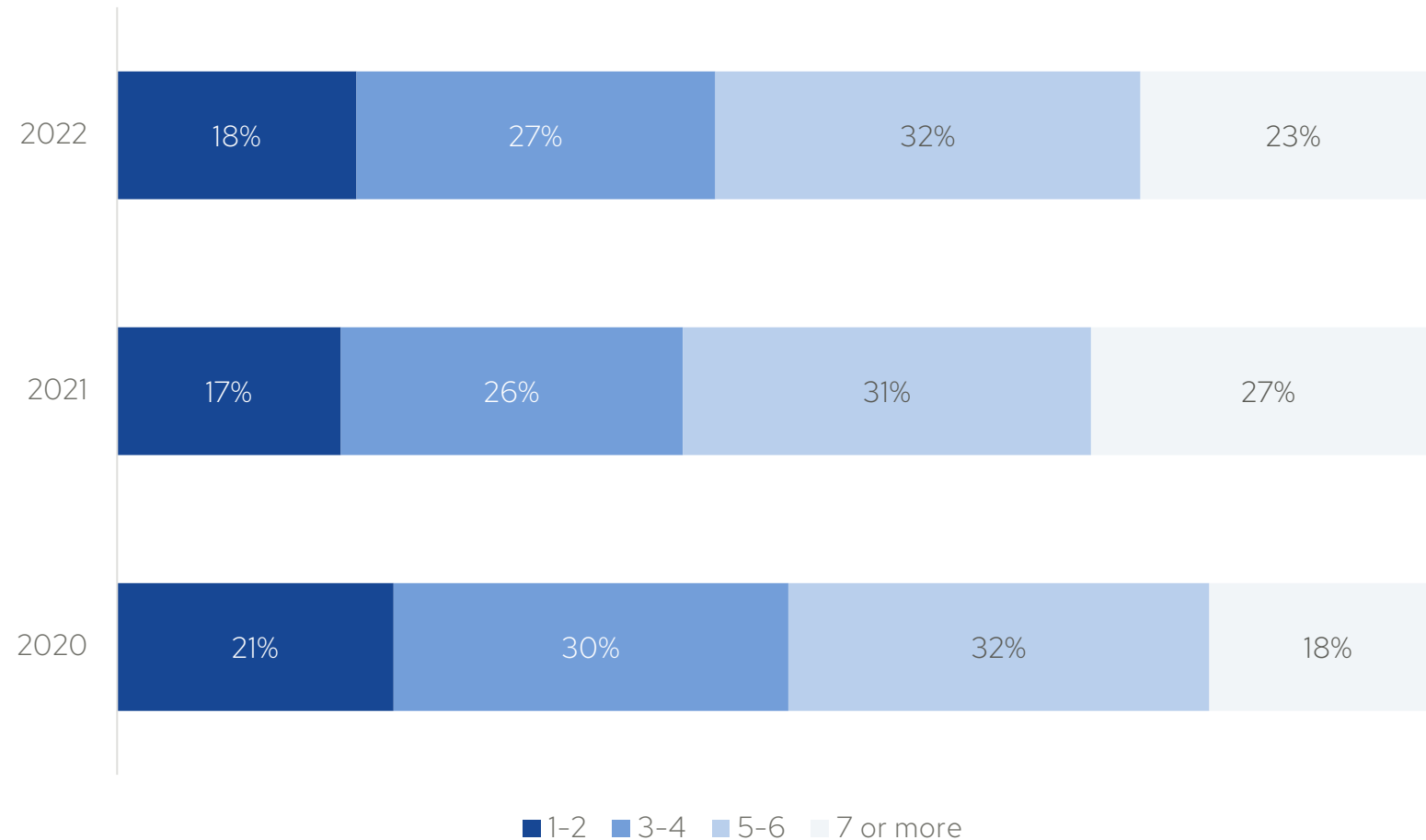
☐ How interested are you in the following modes of study?



# Proliferation of information is driving up the number of institutions a student is considering

Nearly a quarter of students will consider at least 7 universities

Number of Universities Under Consideration by Prospective International Students

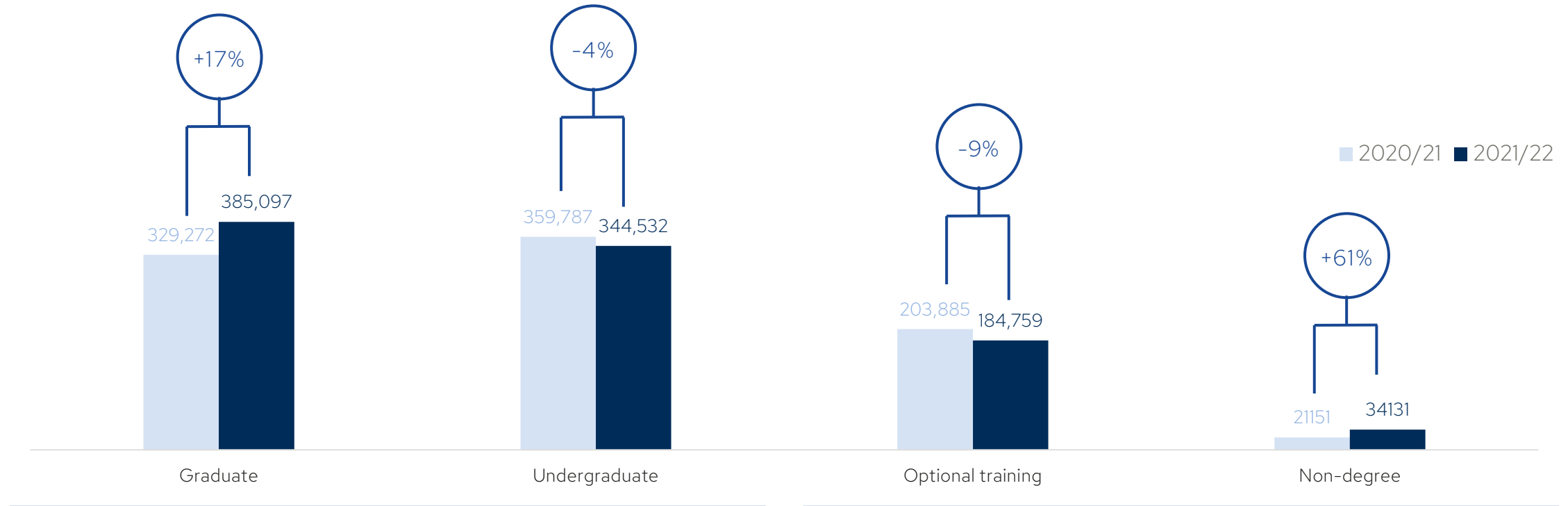


- In 2022, nearly a quarter of candidates considered at least 7 universities and over half considered at least 5
- Majority of students are now considering institutions from over 3 countries, compared with just 1.5 back in 2017

# Sustainable Pipeline

# Graduate studies have been driving the recovery

Number of enrolments 2020/2021 and 2021/2022

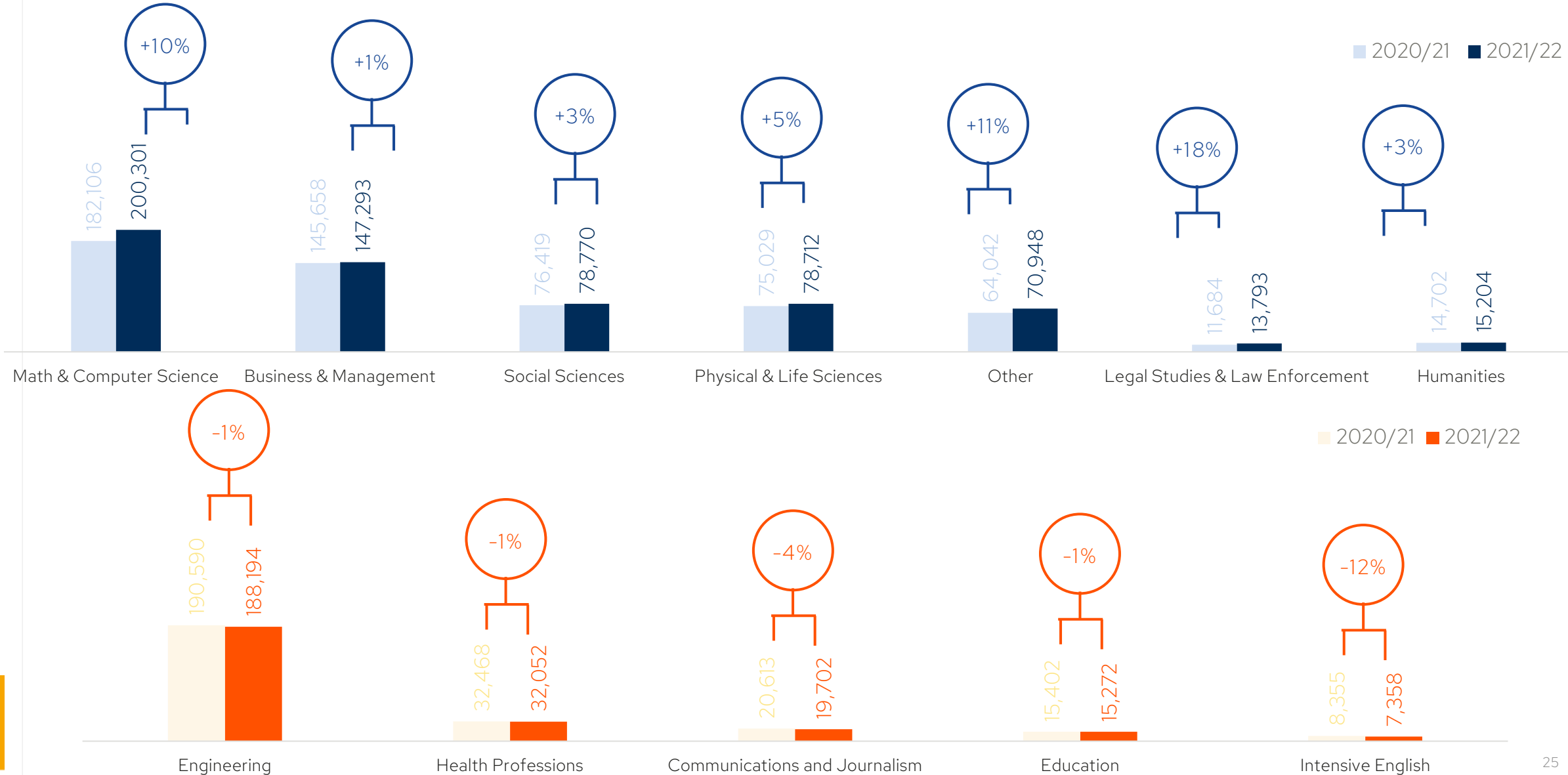


- 17% year-on-year increase in Graduate admissions
- Figure of 385,097 is only marginally below the peak in Graduate enrolments seen in 2016/17 of 391,124
- Rise in Graduate admissions offsets declines in enrolments of Undergraduate and OPT study levels
- 344,532 Undergraduate admissions is lower than the 370,724 recorded in 2013/2014



# With STEM-designated subjects the growth priority

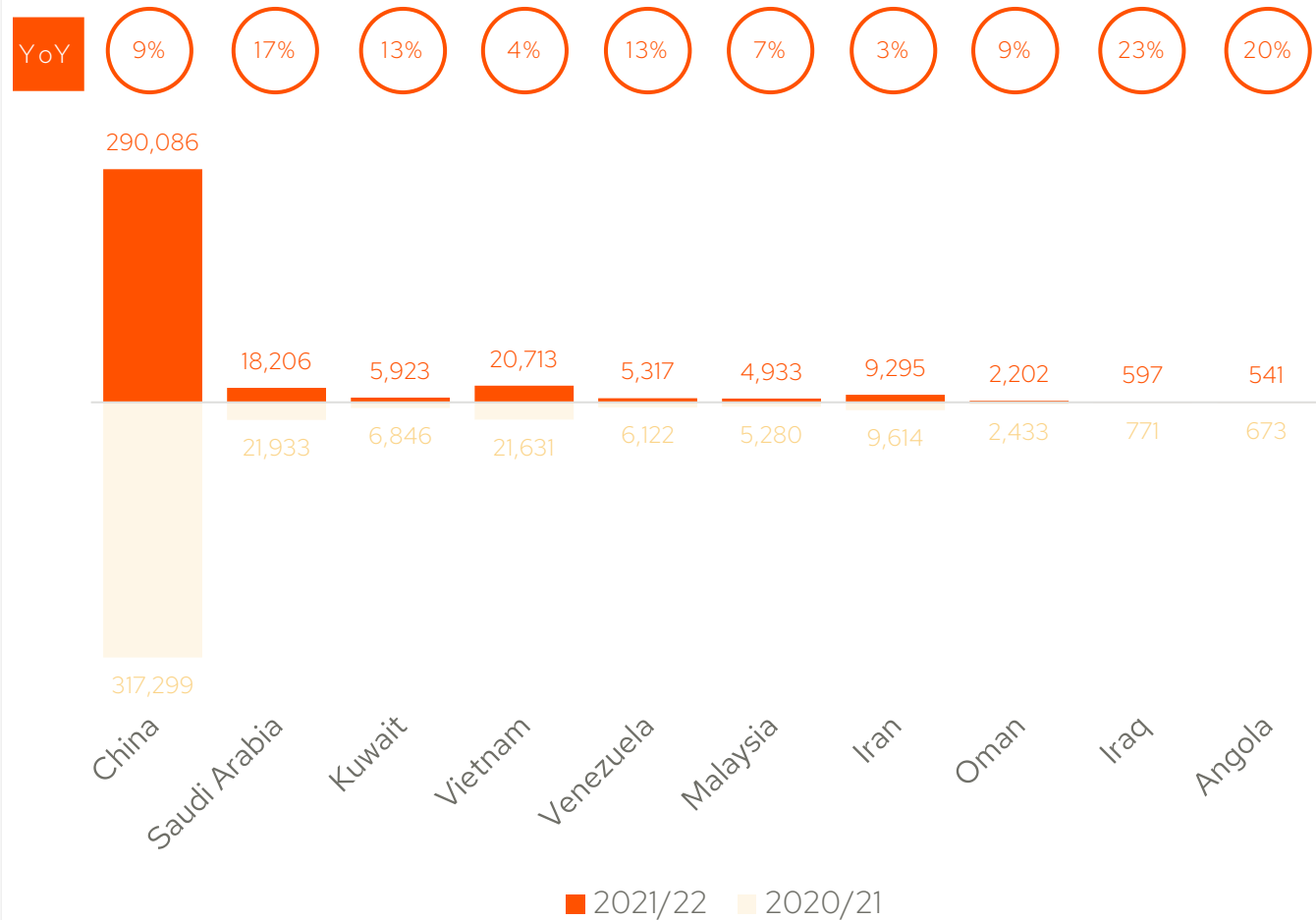
Number of enrolments 2020/2021 and 2021/2022



# Global geo-political pressures intensify the need for international diversification

China and the Middle East have contributed a total loss of more than 32k international students to the US

Top 10 Fastest Declining Source Countries to the US (2020/21 – 2021/22)

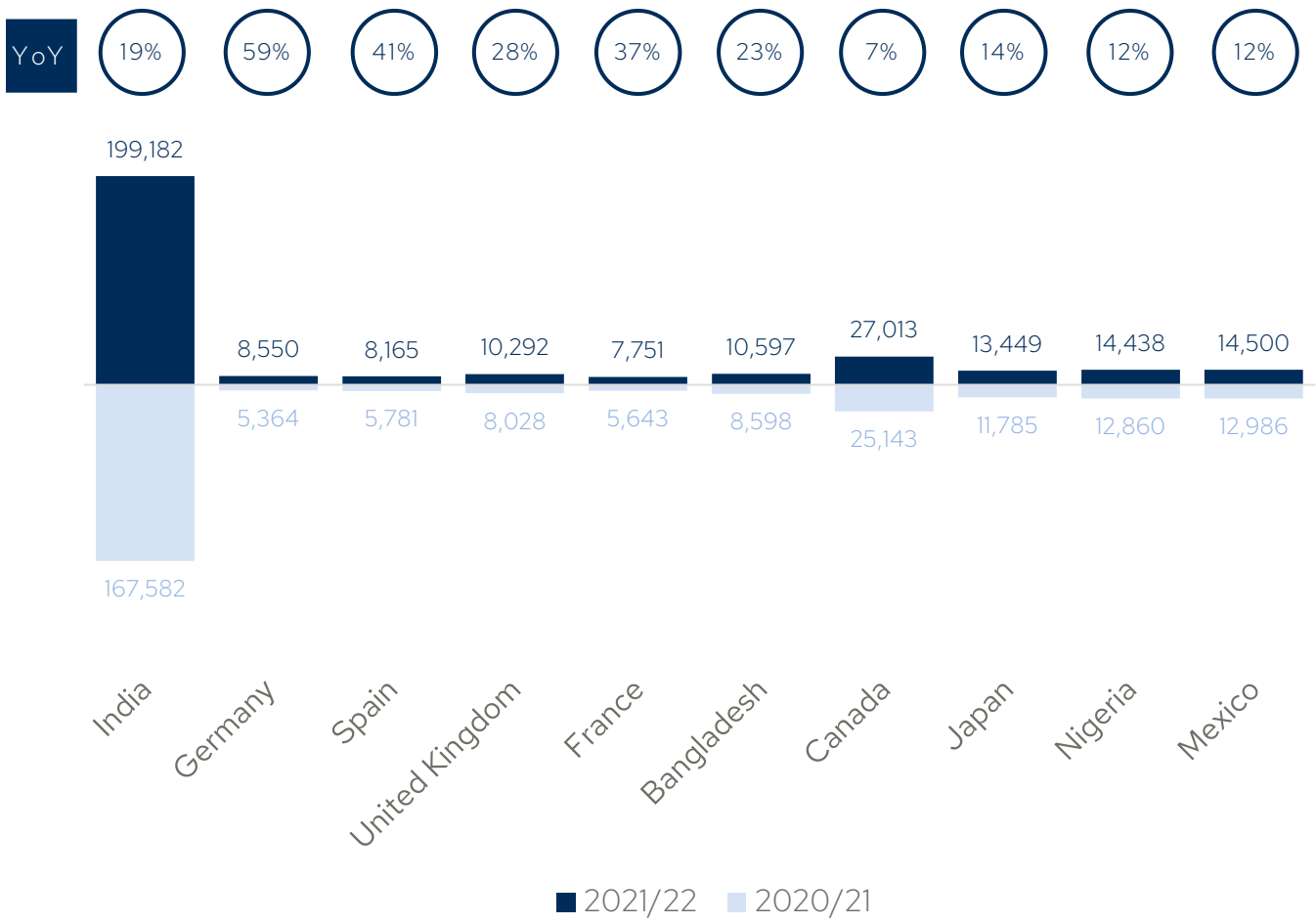


- China contributed a total loss of 27,213 international students in 2021/22, down 9% year-on-year, which was directly offset by the growth from India
- The geo-political tensions between the US and the Middle East may have contributed to declining international student numbers from markets such as Saudi Arabia, Iran, Iraq with a further 5,300 deficit from these markets
- Whilst market share was lost to other core destination markets in South-East territories such as Vietnam

# Diversification is a must for future growth and sustainability

South Asia, Western Europe and West Africa contributed an additional 45k international students in 2021/22

Top 10 Highest Growth Source Countries in the US (2020/21 – 2021/22)



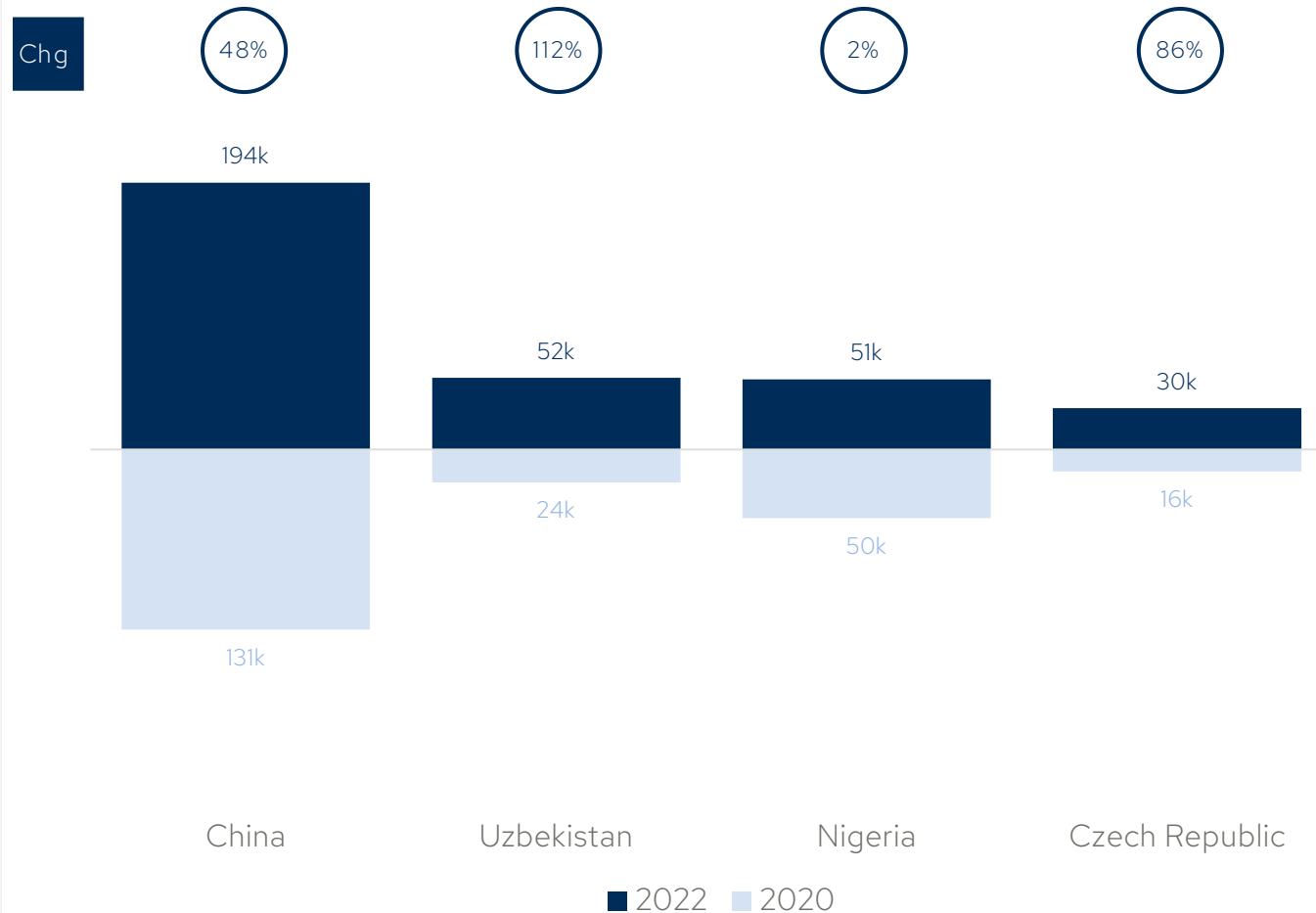
- In 2021/22, India delivered an incremental 31,600 international students primarily onto postgraduate courses
- European source markets recovered at the fastest rate, with countries such as Germany, Spain, UK and France collectively delivering an additional 9,900 international students
- West Africa represented another key postgraduate growth markets with 12% year-on-year growth



# China showing early signs of a re-bound for reputationally strong schools

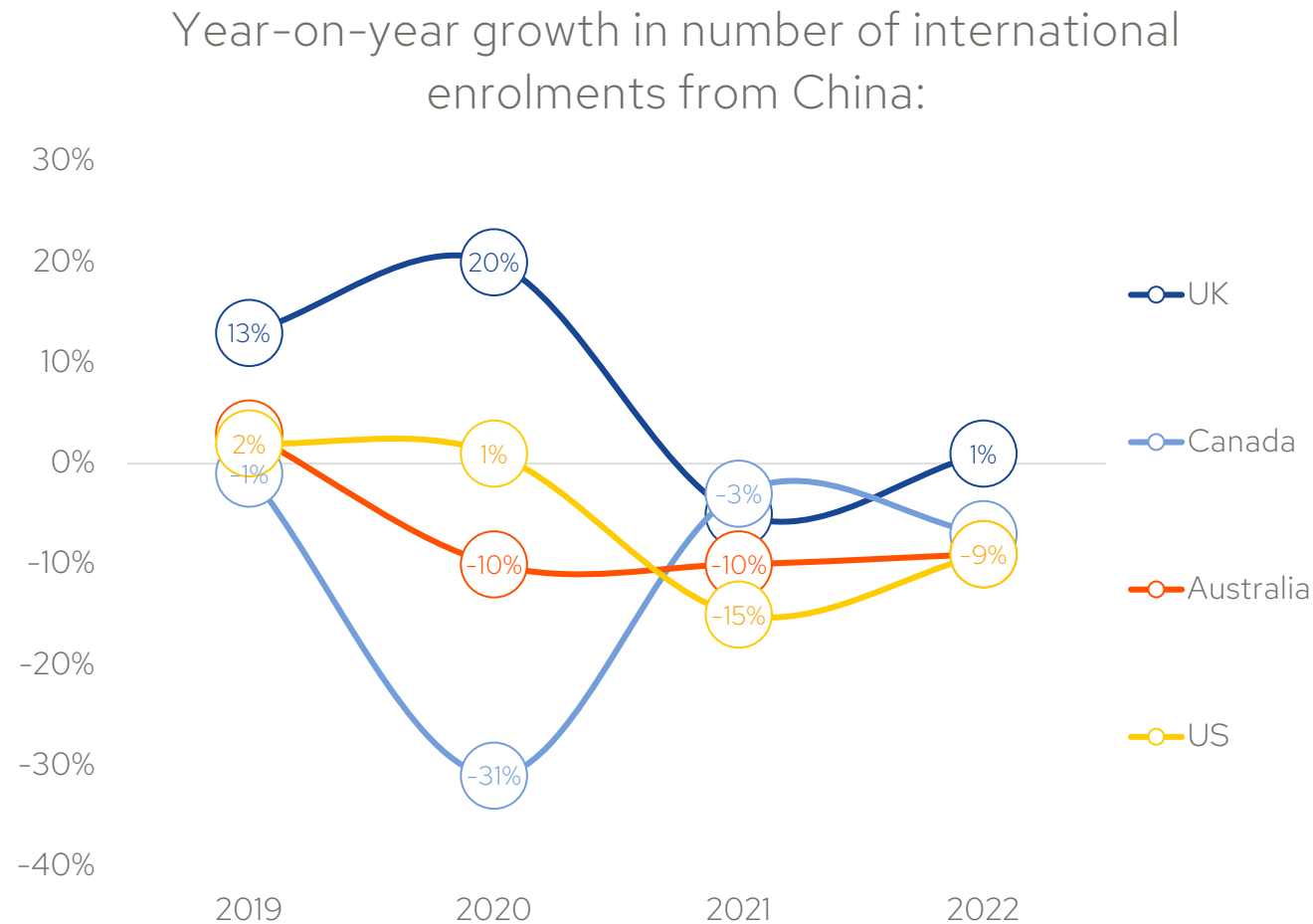
Whilst further diversification is seen from rising interest in EECA and West Africa

Top Growing Source Countries Interested in US (2020/21 – 2022/23)



- With borders now opening back up in China and the mandate clear to travel back overseas to complete studies, unsurprisingly there has been a resurgence in interest in US study
- Eastern Europe and Central Asia have driven have 42k visitor growth to US profiles onsite in the past 12 months, showing further opportunity for diversification

# When recruiting internationally, over-reliance on a single market presents its own risks and rewards



International student flows from China to the 'big four' destinations have declined over the last four years

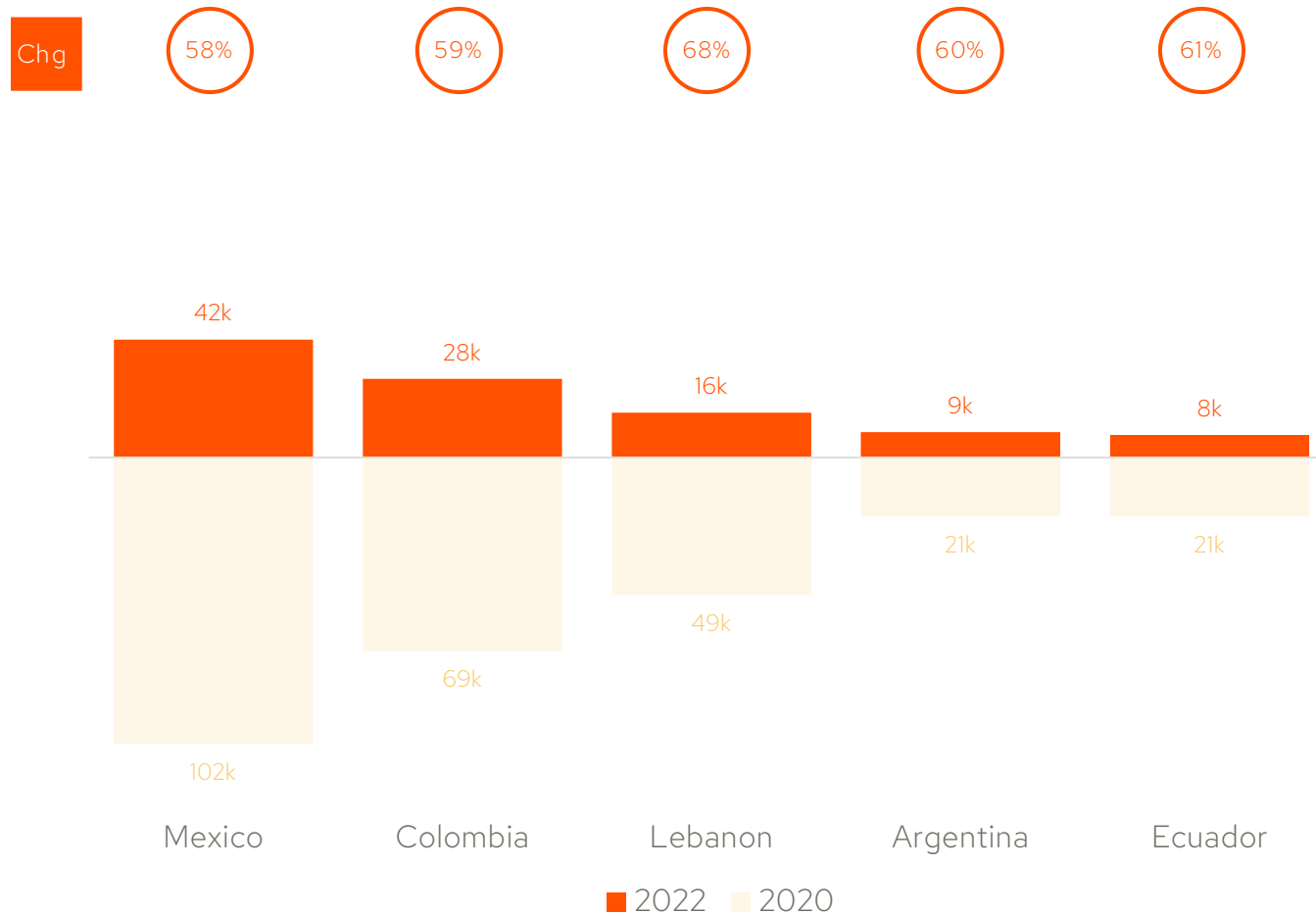
Whilst the pandemic can account for a great deal of this trend, numbers have continued to decline post-pandemic

The ever-changing geopolitical landscape now has potential financial implications for several institutions

The most effective institutions will have a global recruitment presence to minimise risk against shifting international student flows

# Geo-politics and ongoing economic challenges may be driving decline in study interest from Latin America

Fastest Declining Source Countries Interested in US (2020/21 – 2022/23)



- The ongoing geo-political tensions between the US and some Latin American nations continue to have an impact on study demand, as it's increasingly seen as a less welcoming study destination by students from these markets
- Overall, there was a 126k visitor deficit year-on-year from these Latin American markets

# Pathways to Success

# Key source markets are becoming increasingly reputation sensitive

% who cite a university's ranking as one of the most important elements when choosing a university

#1

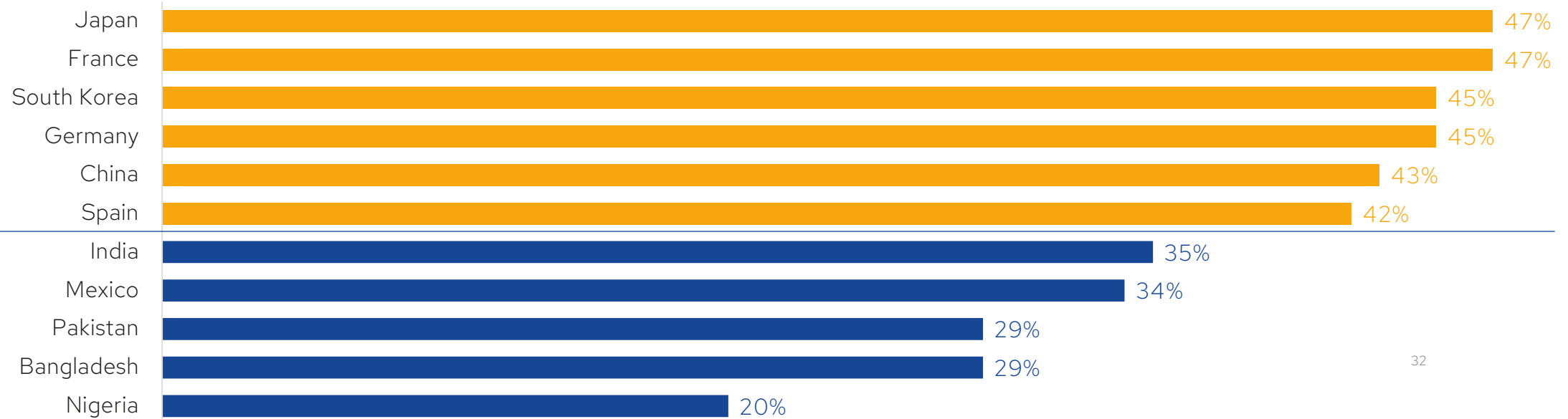
Candidates from Western Europe and East Asia are much more likely to prioritise a university's ranking

#2

Candidates from South Asia and Africa are less likely to focus on this element of an institution

#3

Utilised correctly, performance in independent rankings can be an effective tool in recruiting international students





# Reputationally sensitive and cost-sensitive markets is widening

% who cite the availability of scholarships as one of the most important elements when choosing a university

#1

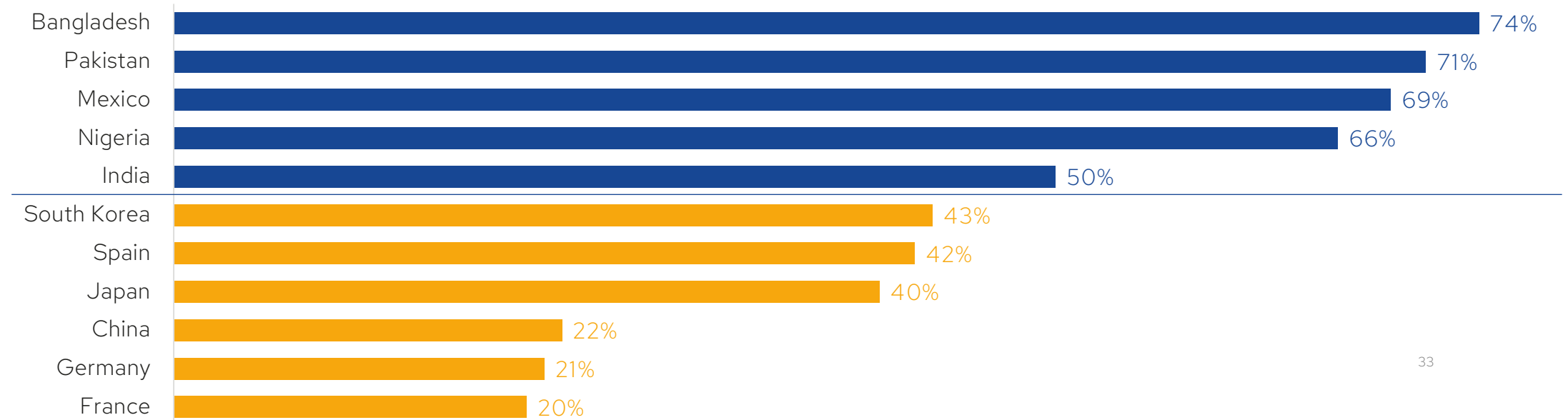
Value-related elements are more important to candidates from South Asia and Africa

#2

There are significant regional variations in the importance of these elements

#3

Financial assistance is often best indicated at the start of the enquiry to enrolment pathway



# Ratings play a vital role in student decision-making

# 58%

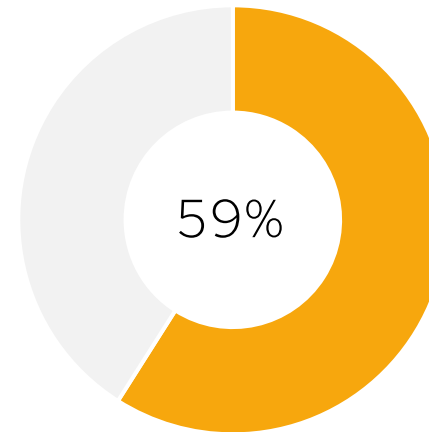
Would consider a university that ranks lower but rates well in all areas

"I believe that a genuine rating from the school alumni has a lot of realistic feedback about the university/quality of teaching/opportunities etc., because any university can advertise by elevating their own factors. However, these sometimes can give false expectations"

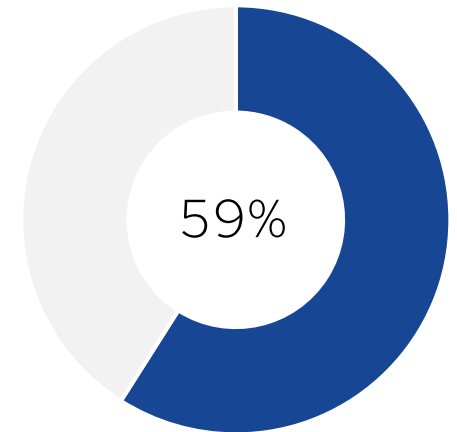
"Because, I think universities are being rated based on campus, teachers' experience, university's history, people opinion, students' employment and teaching programs."

"Provided that the ratings were measured by a 3rd party, I believe that it is an accurate representation of a university's qualities across many different criteria, which are important to keep track of when choosing a university."

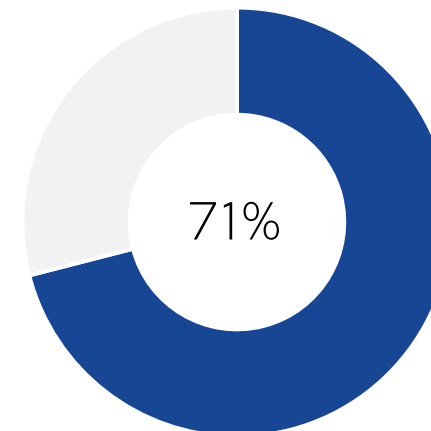
Ratings are important when choosing a university



An accurate representation of university's quality

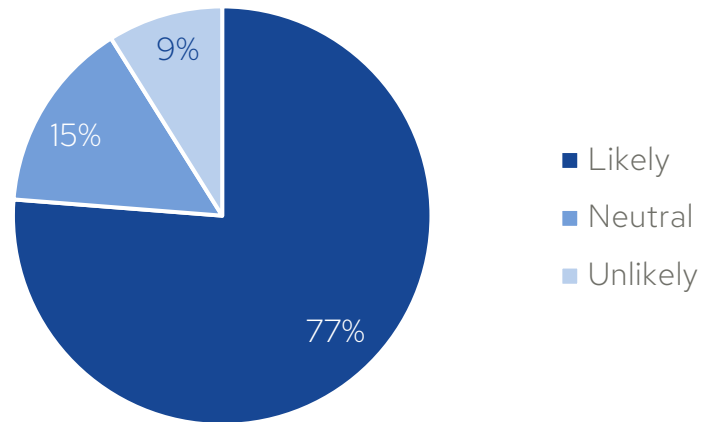


Influence job prospects after graduation



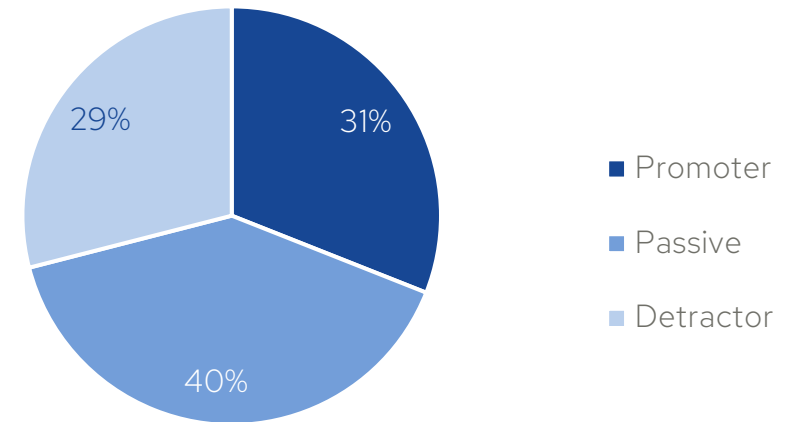
# Performance in the QS Stars rating can have a significant effect on candidate decision-making in terms of consideration and advocacy

How likely are you to consider applying to a university if they are rated highly on QS Stars categories?



- Over three-quarters of candidates are likely to consider a university if they rate highly on QS Stars categories

How likely are you to recommend a university with overall 5 QS Stars rating to someone else considering a degree?



- 31% of candidates would actively recommend a university with a QS 5 Star rating

While ranking doesn't hold importance across all markets, underlying teaching quality and institutional reputation are both important factors when candidates make study decisions



### Course selection

1. The course offers high quality teaching
2. I have a personal interest in the subject
3. It's at a university with a good reputation



### Country selection

1. It has universities with high quality teaching
2. It is welcoming to international students
3. Good reputation as a place to study



### University selection

1. It offers high quality teaching
2. It has a good reputation for my chosen subject area
3. It is welcoming to international students

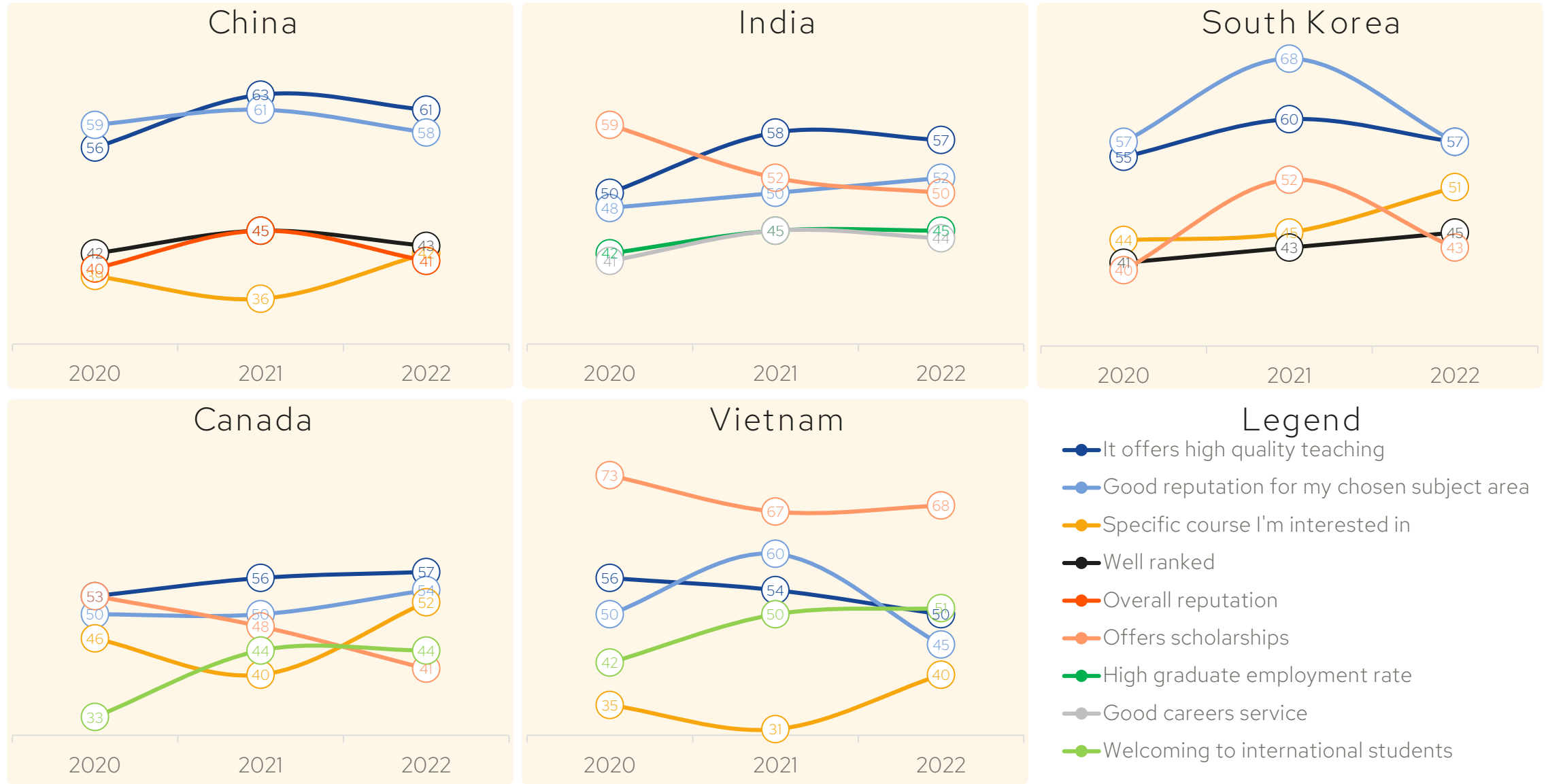
# What five factors best indicate that a university provides high quality teaching?



- ▶ Received recognition of teaching quality in national scheme
- ▶ The university's teaching staff
- ▶ Ranked well overall in independent ratings
- ▶ Up-to-date technology
- ▶ A high graduate employment rate

# Decision factors fluctuate significantly over time impacting strategic alignment and communication effectiveness

What five things are most important to you when choosing a university? (% scores)



# Emerging source markets have a different set of priorities

What things are most important to you when choosing a university?

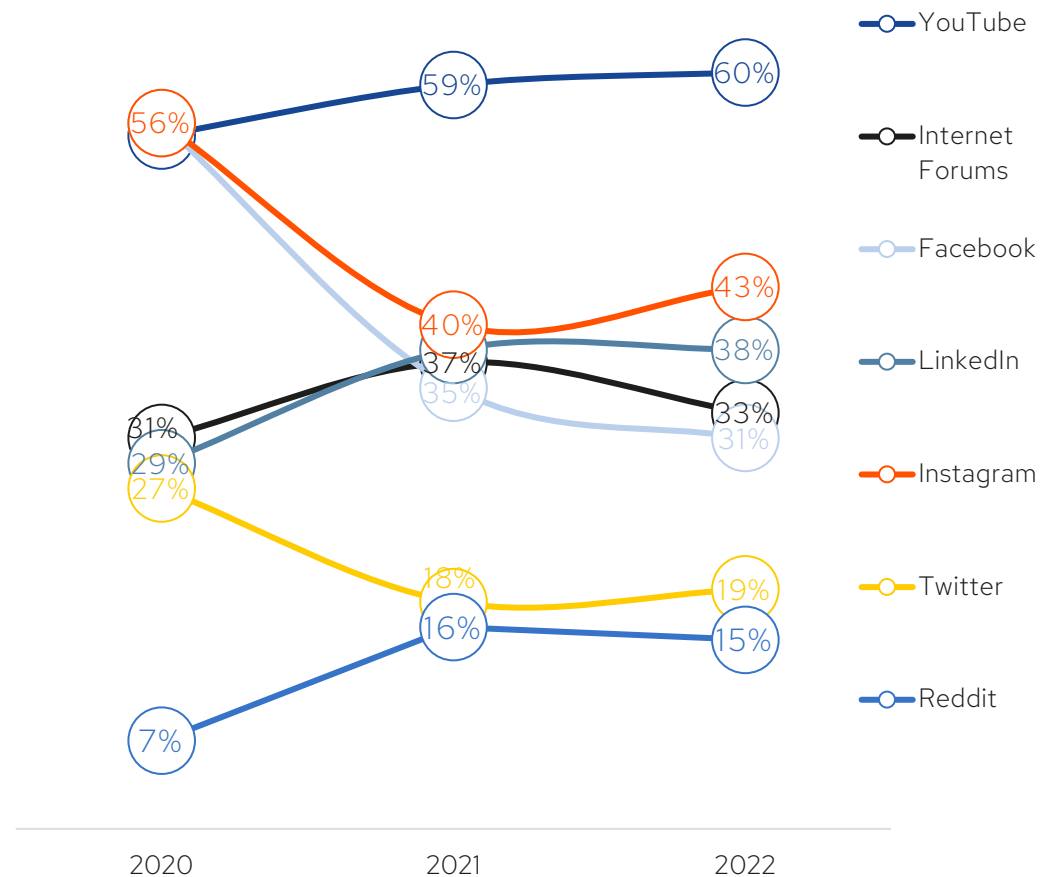
	India	Vietnam	Nepal	Brazil	Uzbekistan	Colombia
It offers high quality teaching	①	②	②	③	③	②
It offers scholarships	②	①	①	①	①	①
It has a good reputation for my chosen subject area	③					
It is welcoming to international students		③	③	②	②	③



# The popularity of various social media platforms can fluctuate significantly in a short period of time

## This makes it difficult to guarantee a return on investment

Which of the following types of social media do you use for research when making decisions about studying overseas?



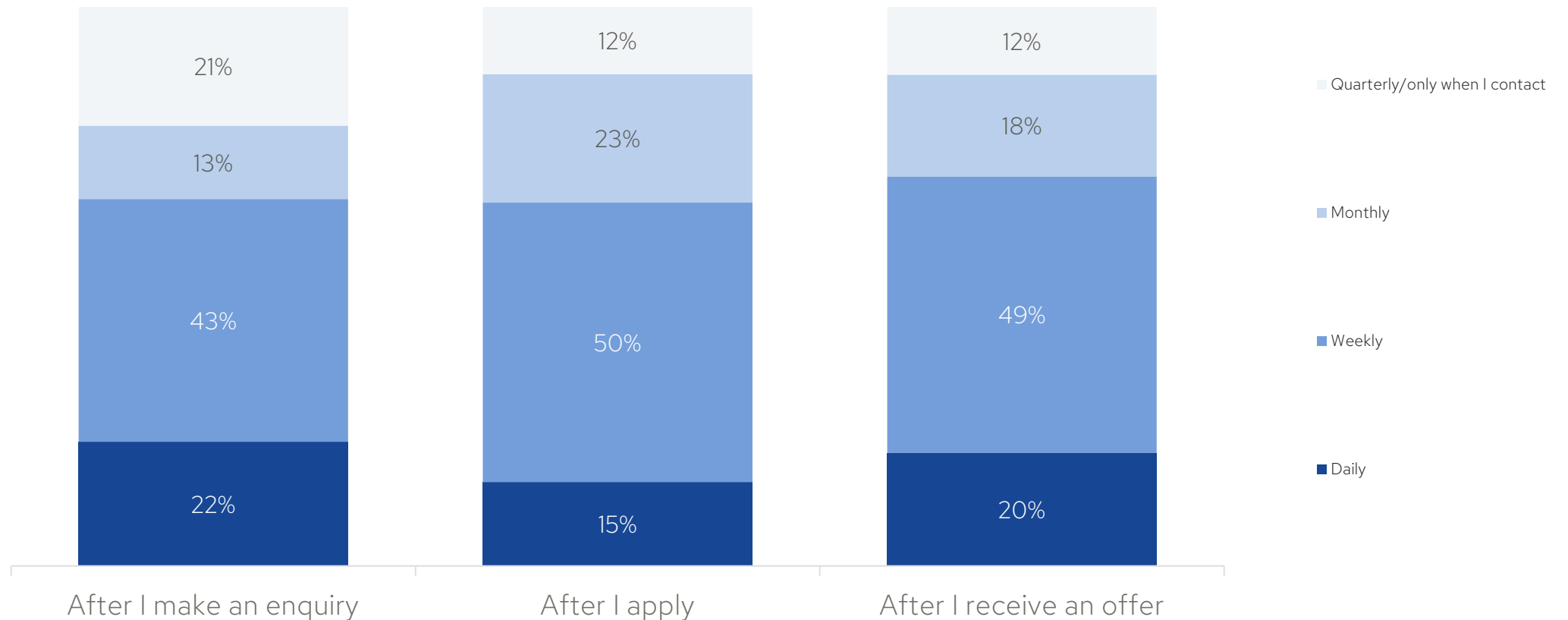
- ▶ In 2020, YouTube, Facebook and Instagram were all equally likely to be used for research about universities
- ▶ Since then, both Facebook and Instagram have seen their usage decline significantly
- ▶ Usage of Reddit as an information source has maintained the growth in popularity seen between 2020 and 2021
- ▶ LinkedIn is the third most popular social media platform used for research about universities
- ▶ Whilst TikTok is a platform on the up, usage for research about universities is still comparatively lower



# Make admissions personal


























Most candidates expect to hear from universities on a weekly basis throughout their pre-enrolment journey

How often would you expect a university to contact you at the following stages?



# Meet the student where they are

Which of these would you like to use to communicate with a university you are considering studying at?

	China	India	South Korea	Canada	Vietnam
1	Email 	Email 	Email 	Email 	Email 
2	WeChat 	WhatsApp 	Kakao Talk 	Phone call 	Facebook 
3	Phone call 	Phone call 	SMS / Text 	Real-time chat 	Phone call 
4	QQ 	SMS / Text 	Phone call 	SMS / Text 	SMS / Text 
5	Real-time chat 	Real-time chat 	WhatsApp 	WhatsApp 	Real-time chat 

# Key takeaways



Domestic recruitment is going to become more competitive with international competition growing



Long-term sustainability will depend heavily on institutions' ability to diversify their international student base



Growth markets for institutions have significantly different priorities, adding complexity to the recruitment challenge



Knowing your global reputation is pivotal to long-term success



Country specific communication flow is a must



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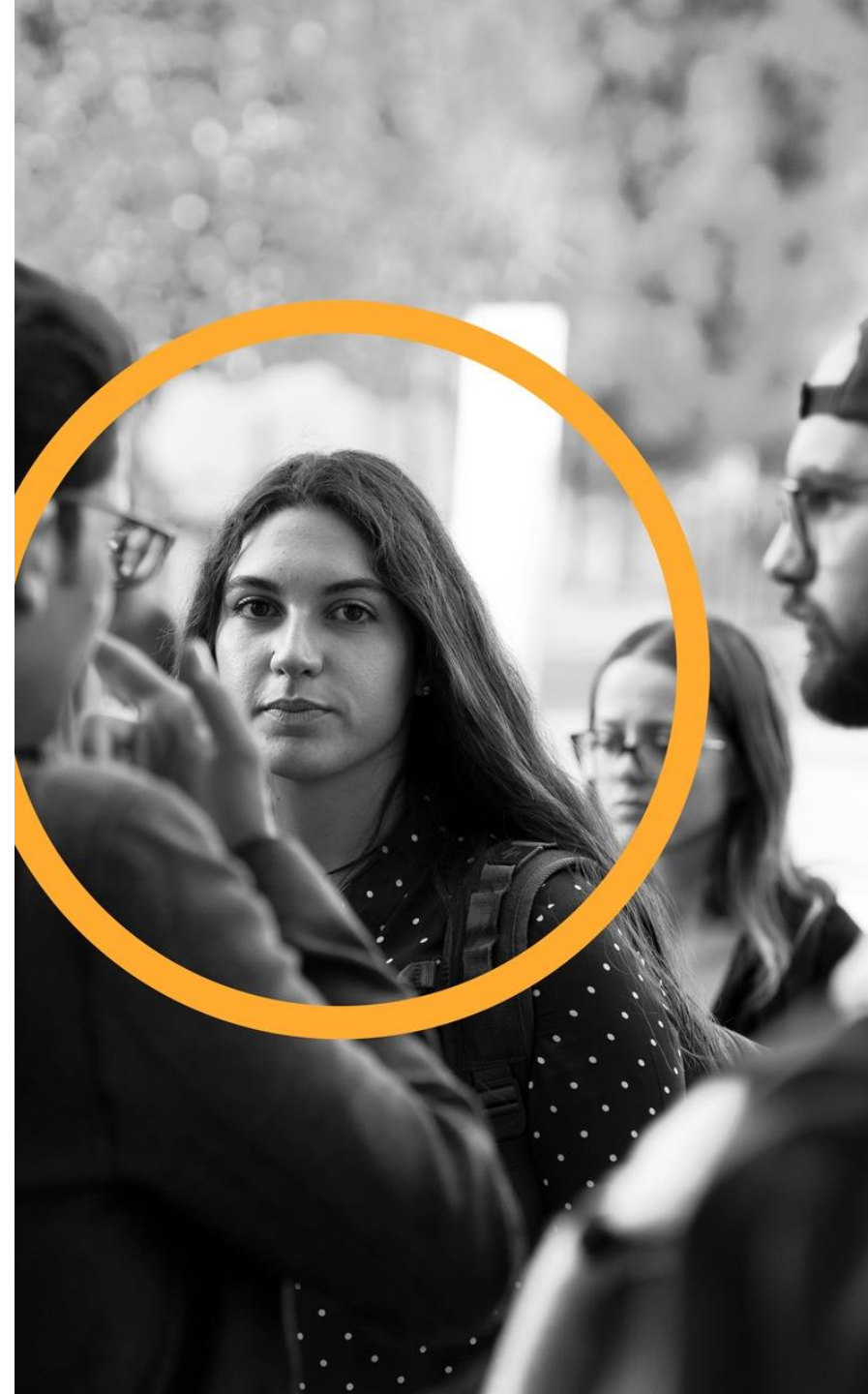
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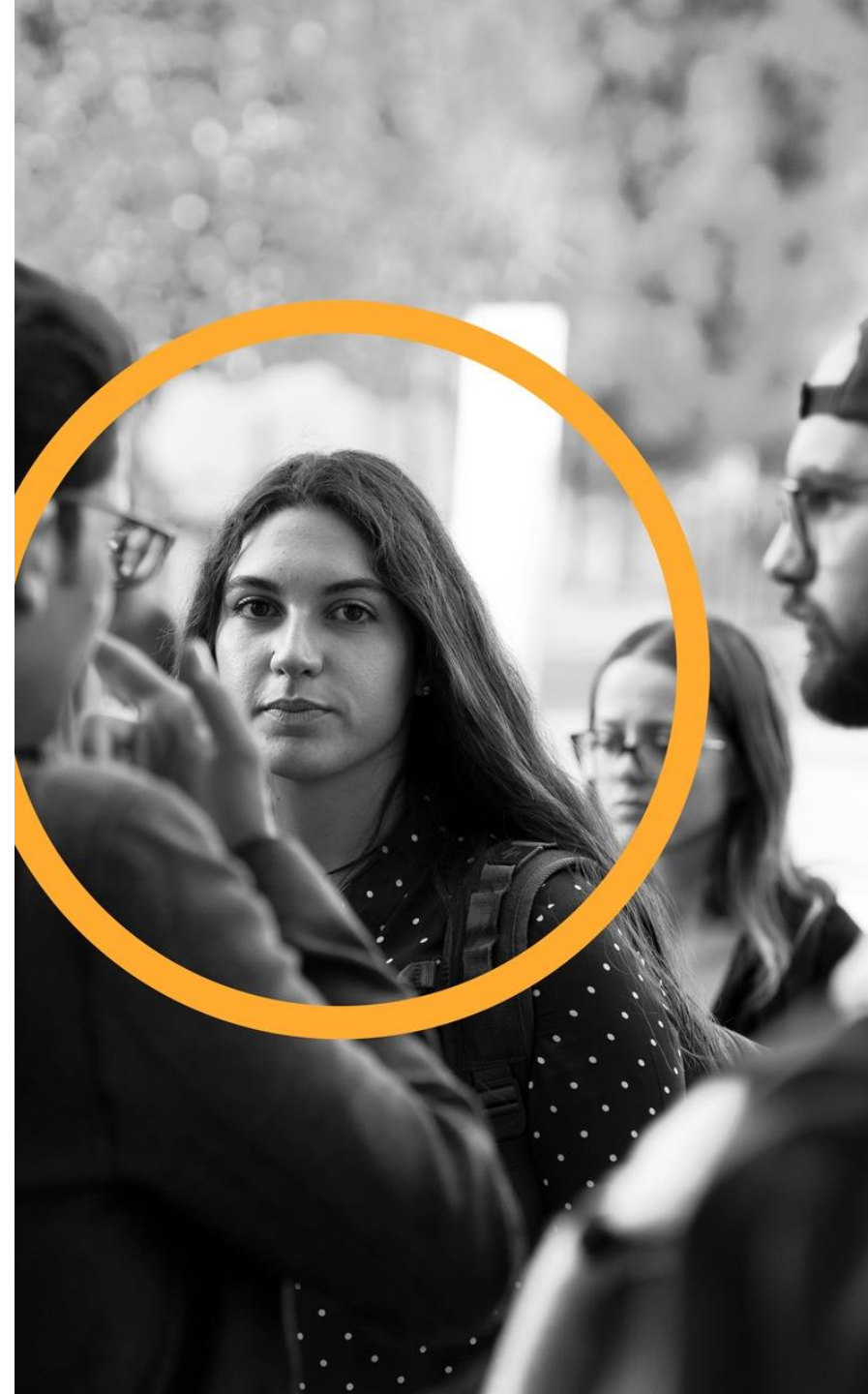
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Thank you!

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