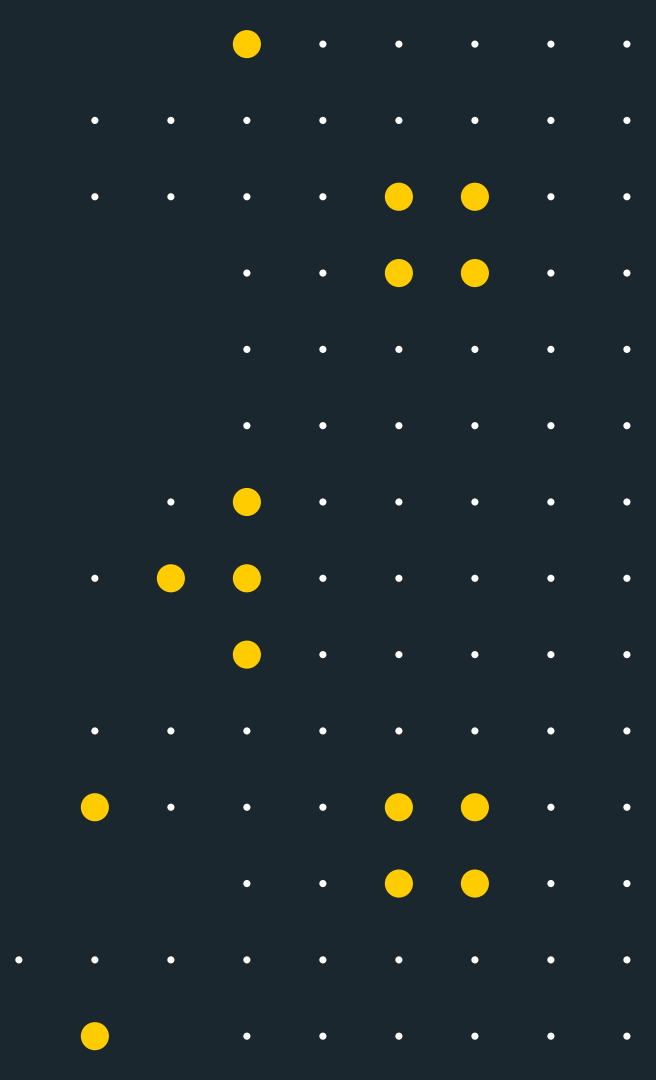





# Decoding student perception data for **smarter marketing strategy**





**Perception over reality:  
How are destinations  
actually viewed?**

From perception to  
application: How policy can  
shift student decisions

How to turn insight into  
sharper destination  
marketing

# Student choice is becoming faster, more uncertain, and more perception-led

## Reality

Study decisions are shaped as much by *beliefs* as by facts

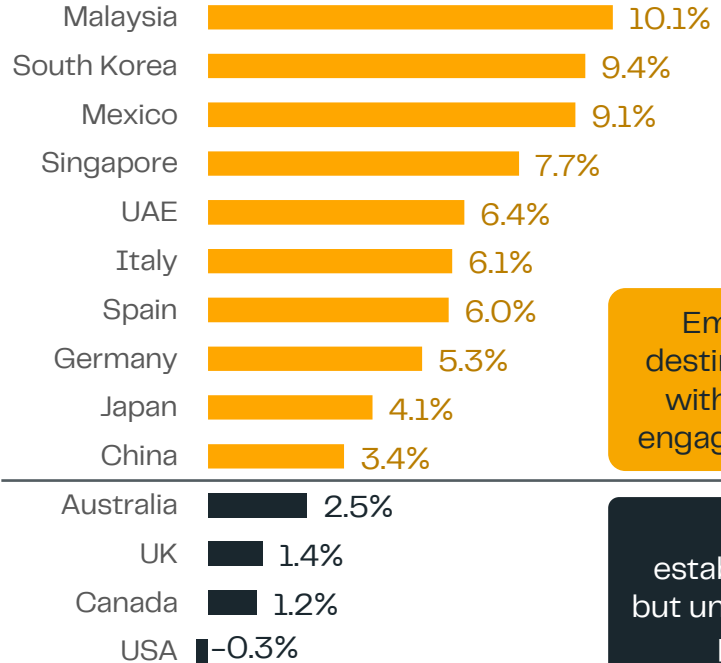
## Sensitivities

Policy volatility and cost pressure amplify perception effects

## Diversity

Destinations with similar academic offers see very different outcomes

## 2023–2030 Growth: International Students



Emerging destinations with global engagement

Well established, but uncertain policies

# Perception doesn't have to be accurate to be decisive

Students act on what they **believe** a destination offers

Official narratives often lag lived or **peer-shared experience**

Marketing that ignores perception gaps loses **credibility**

**Policy /  
Outcomes**






**VS**

**Student  
Perception**

# How students actually **decide** where to study

- Students rule destinations **out** before they choose one
- **Trade-offs** are normal: cost vs opportunity, access vs security
- Is higher education worth the **investment**?
- Want **quantifiable, benchmarkable** metrics to back up their decisions

## Indicators of teaching quality at an institution

	Ranking performance	↑ 10%
	Graduate employment rate	↑ 5%
	Recognition in ratings	↑ 5%
<hr/>		
	Teaching staff	↓ 6%
	F2F Teaching hours	↓ 4%

# Four dimensions shaping destination appeal

1

## Value & Access

Affordable

Expensive

Challenging visa process

Ease of remaining

2

## Experience & Belonging

Welcoming

Culturally rich

Good quality of life

Discriminatory

3

## Safety & Stability

Safe

Inclusive

Environmentally friendly

Attractive

Dangerous

4

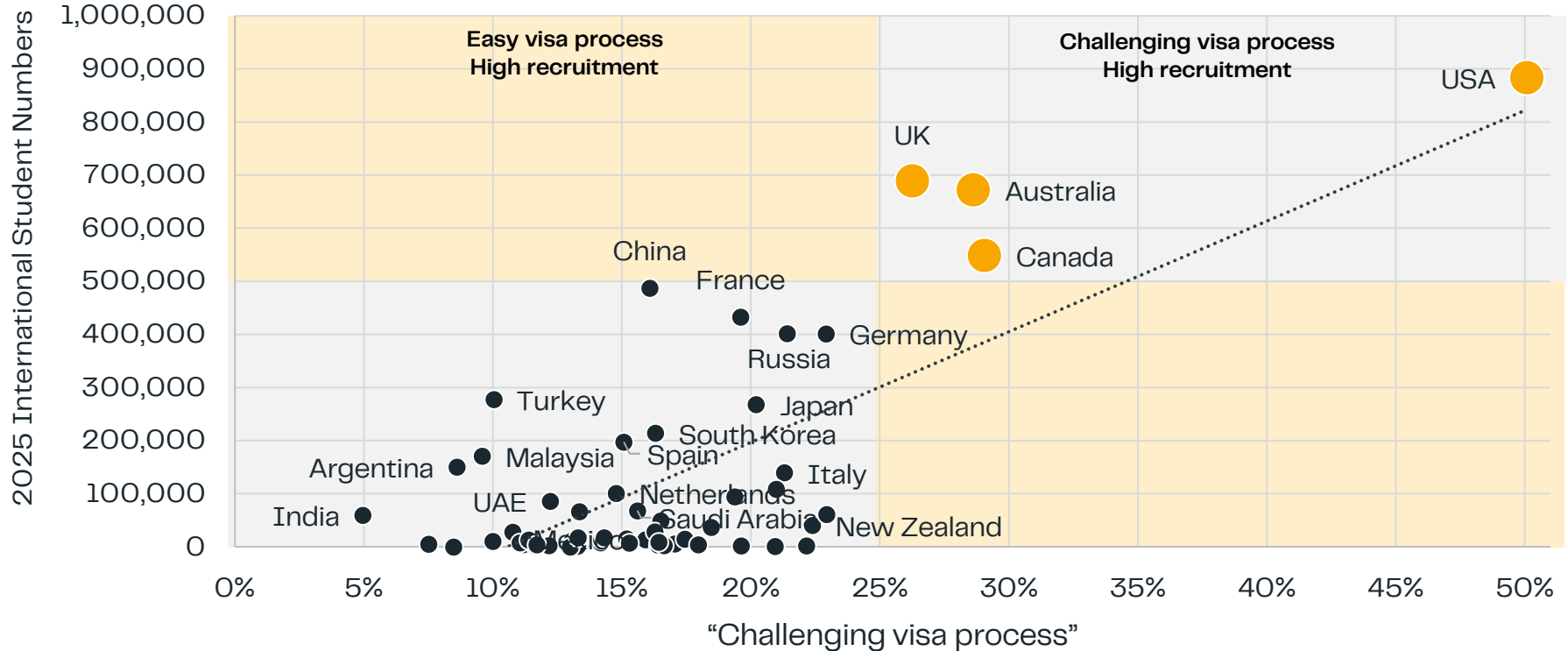
## Opportunity & Future Payoff

Exciting

Innovative

Good work opportunities

# Access and affordability are filters, not selling points



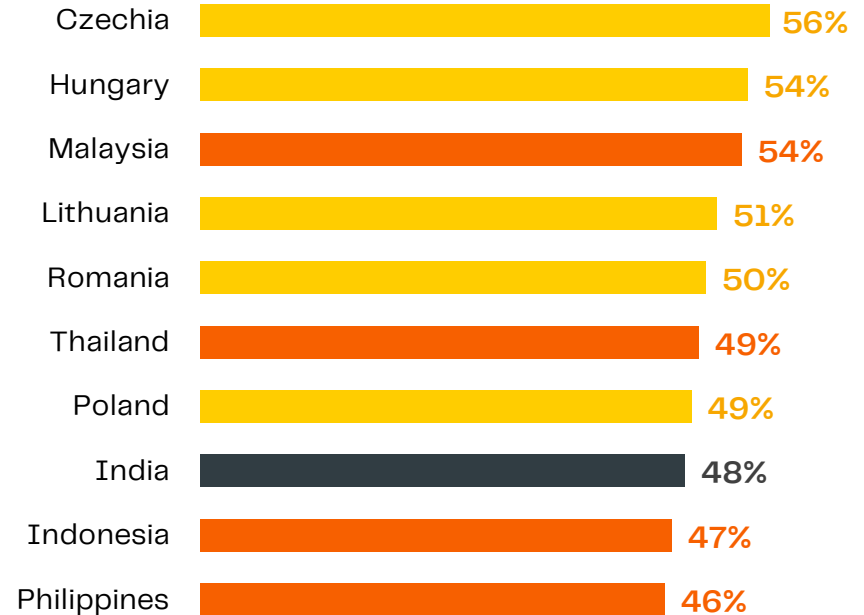
# Students accept trade-offs, but only if you explain them well

## What This Means for Marketing

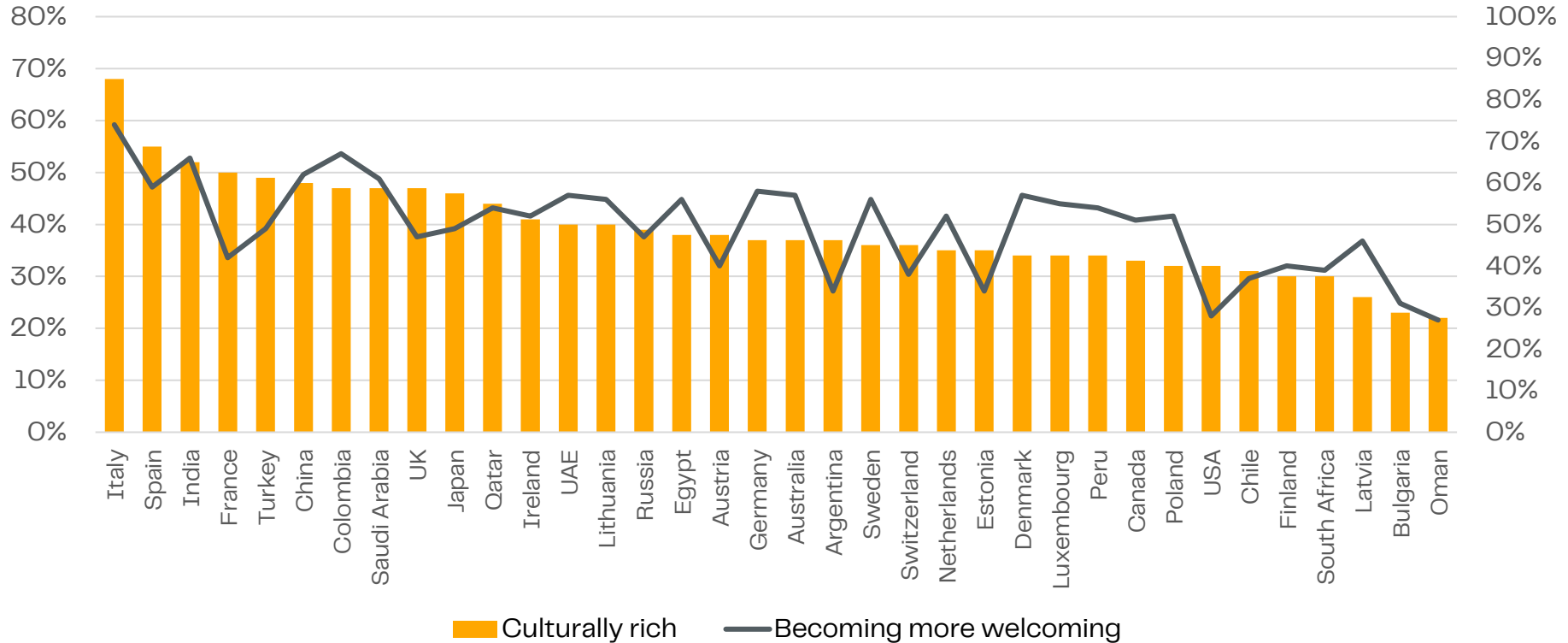
- Avoid generic “value for money” claims
- Be explicit about who a destination is *for*
- Set expectations early to reduce drop-off



## Perceptions of “Affordability” Top 10 countries



# Belonging is now part of destination brand



# Safety and sustainability are baseline expectations

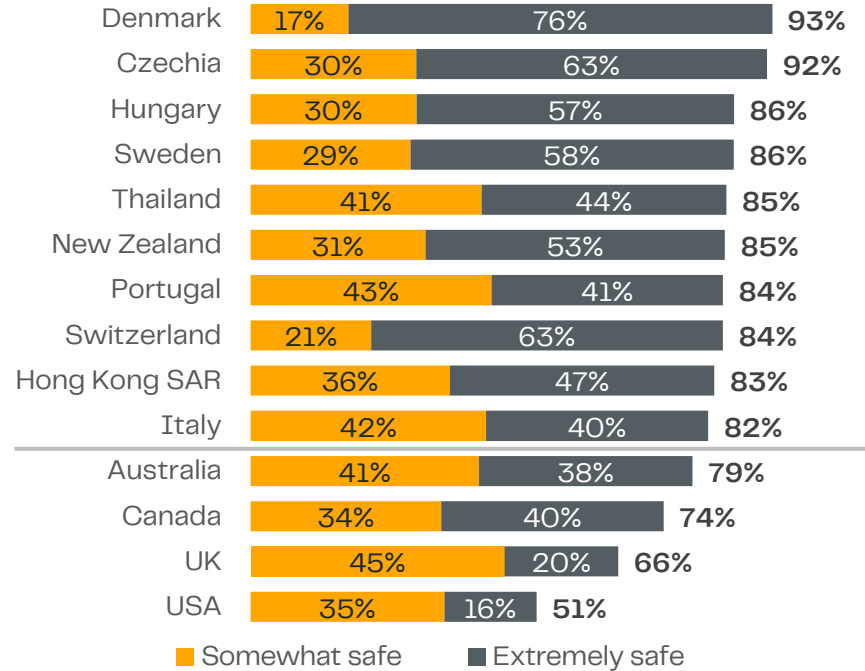
## Safety

Destinations rarely “win” on safety—but can lose quickly

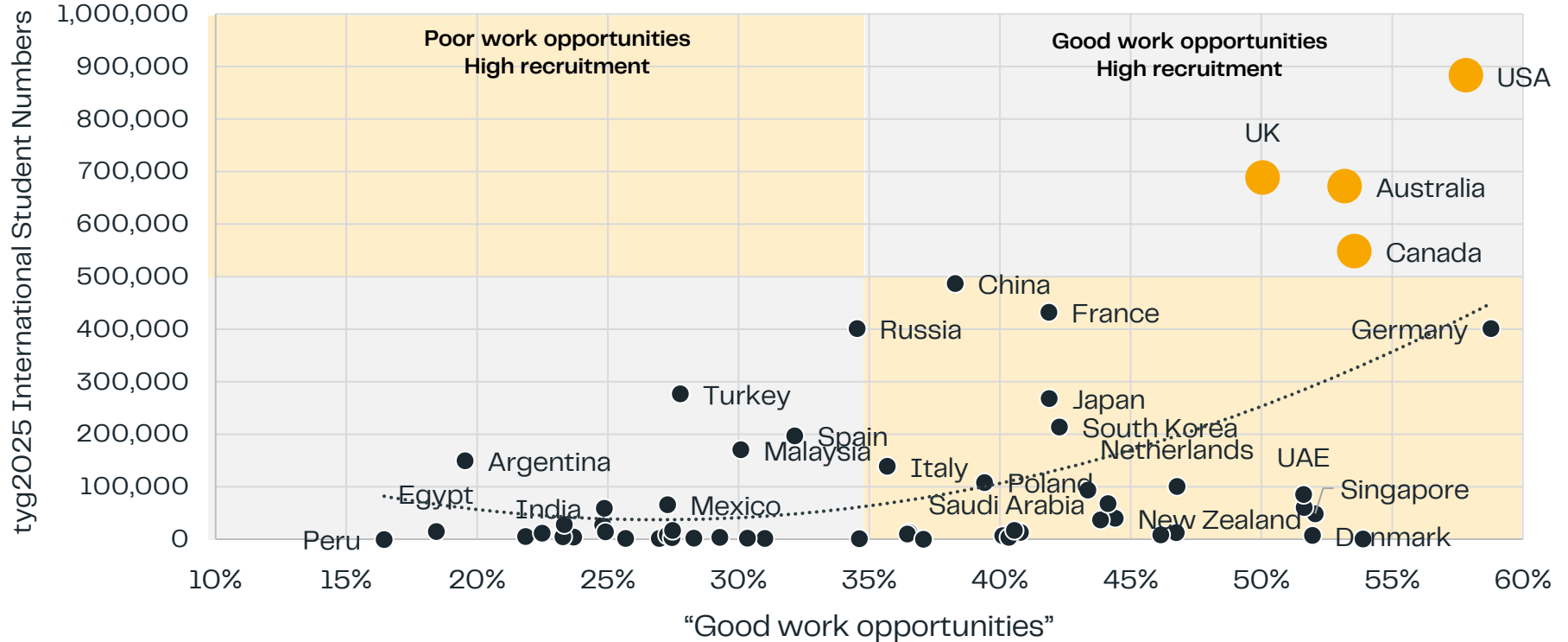
## Word-of-mouth


Silence is interpreted as risk

## How safe are they perceived for international students



# Students want **momentum** after graduation





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# What perceptions actually convert into **applications**

**Awareness**

Students will consider **2-3 countries** they might study in

**Shortlist**

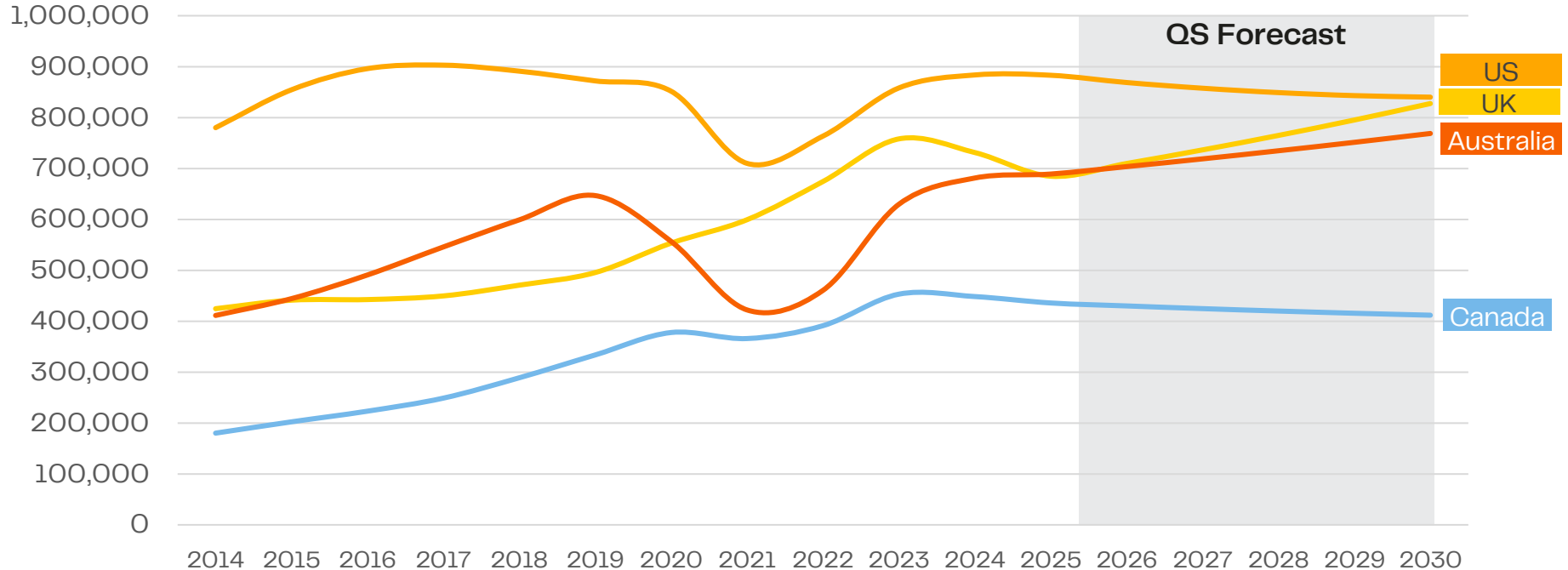
Students will shortlist between **3-4 universities** they want to apply to

**Application**

**62%** want notification on the outcome of their application **within 1 week**

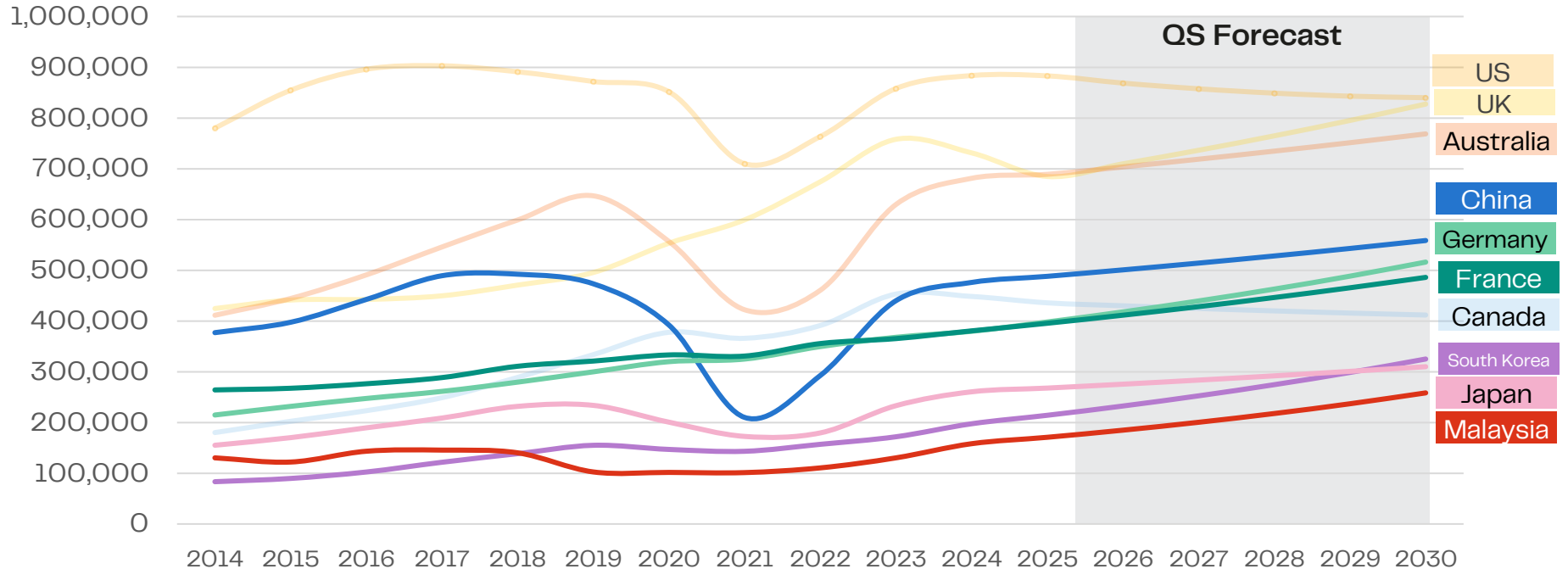
# Demand shifts reflect perception faster than policy outcomes

Inbound international student numbers



# Demand shifts reflect perception faster than policy outcomes

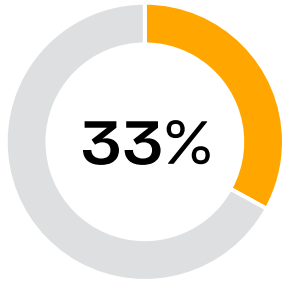
Inbound international student numbers



Source: QS Global Student Flows (excluding OPT)

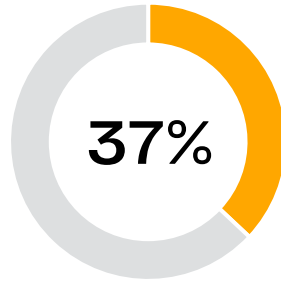
# Policy uncertainty now shapes destination trust

UK



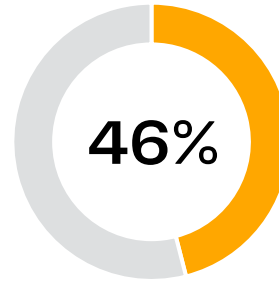
Less interested  
due to the  
**international  
student levy**

Canada



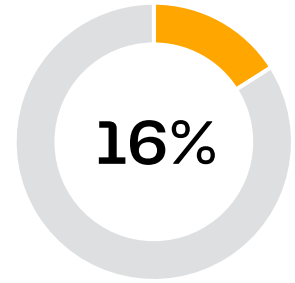
Less interested  
due to the  
**international  
student cap**

US



Less interested  
due to the  
**restriction on  
post-study leave**

Australia

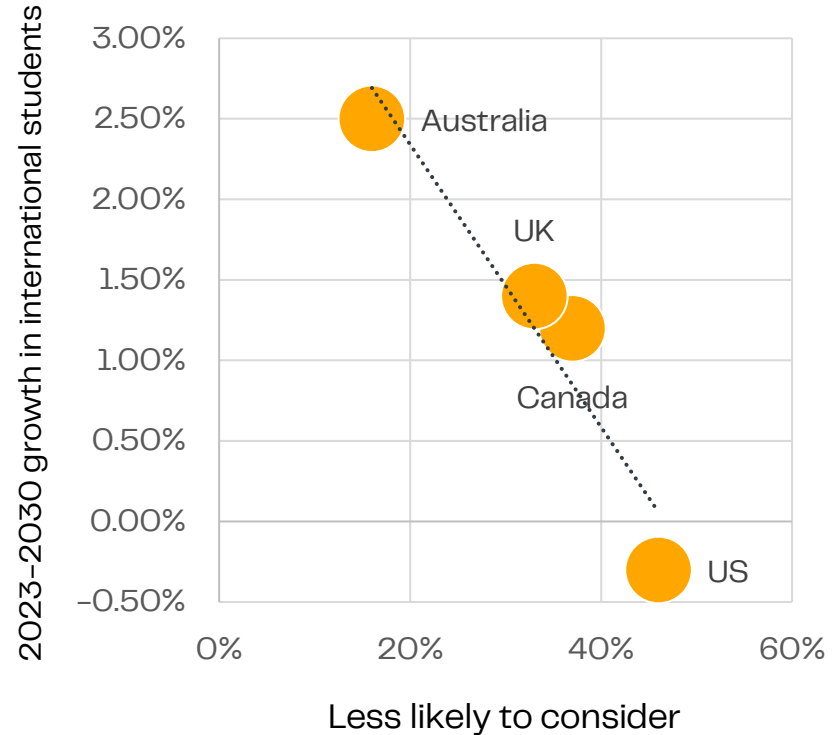


Less interested  
due to the  
**international  
student quotas**

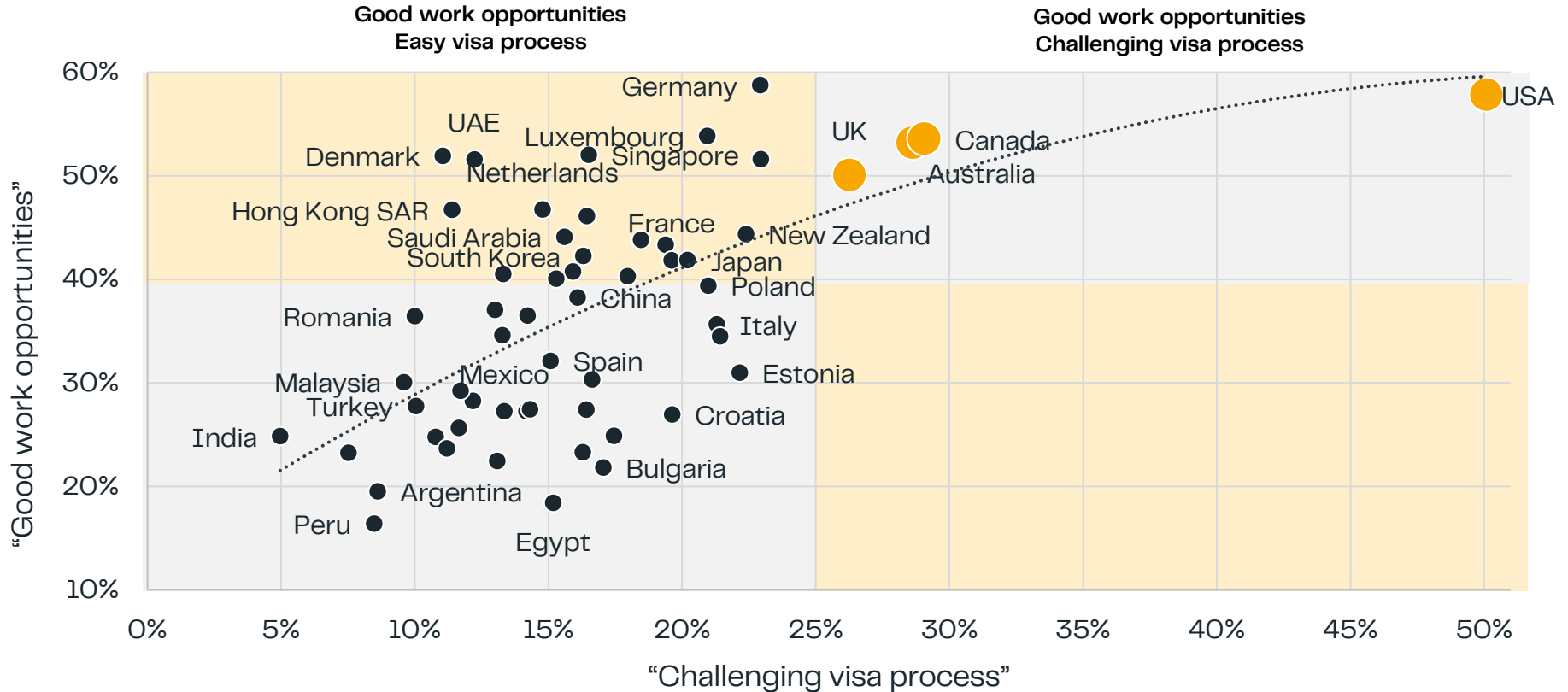
# How likely are students to change plans?


The severity of policy changes and subsequent uncertainty that creates for international students has a direct impact on future enrolment rates.

## Impact of policy changes



# Uncertainty amplifies existing strengths and weaknesses





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# Five shifts for more effective destination marketing

Market trade-offs, not ideals

Address anxieties before selling benefits

Localise messaging by perception gap

Use student voices as proof

Track perception alongside demand

# Using perception data **strategically**

## Identify where perception diverges from reality

Only **46%** of students think the 'Big Four' are becoming more welcoming to international students (compared to **55%** globally)

However, these four destinations still account for **40%** of all international student flows

## Decide what to correct vs what to contextualise

Word-of-mouth is increasingly how students gauge their opinion of a university

**50%** want avenues to connect with existing students and **social media** is now the fourth most useful information source

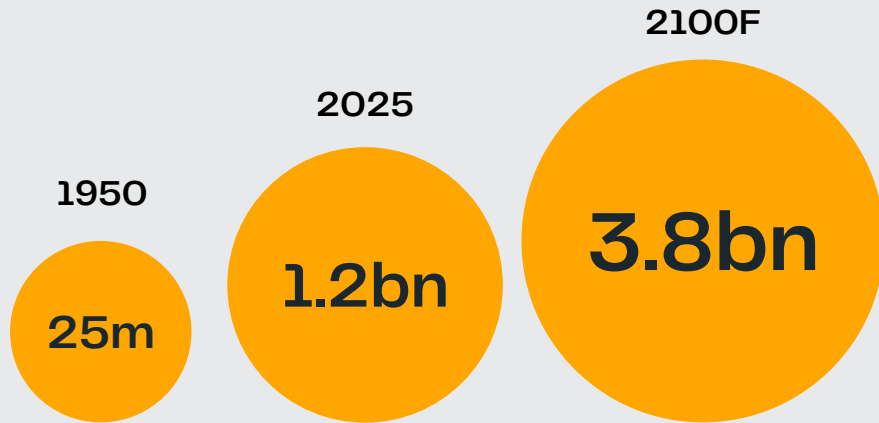
## Align messaging to what students are actively seeking

**53%** of students prioritise a welcoming environment when choosing where to study

**77%** think it's important for universities to offer dedicated support services for international students

# Perception is measurable, movable, and commercially decisive

Number of university-educated people in the world



Source: UN Population Division and Wittgenstein Centre for Human Demography

Destination marketing works best when it reflects how students **see the world today**, not how we hope they'll see it tomorrow

The number of university-educated people will grow, **driving demand** for tertiary qualifications

The competition for international student talent will become more intense, with cross-border flows increasingly dictated by how **destinations are perceived**



Empower your student recruitment with QS

# Thank you

