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About the International Student Survey



Over the last two years, the global higher education sector has shown its resilience and strength. In pivoting their teaching practices to rely on virtual delivery, universities were able to demonstrate their ability to respond to significant challenges in an effective and agile manner. As we emerge from the COVID-19 pandemic, the focus for many institutions will now be how to build their resilience against upcoming, unforeseen challenges and how to ensure their strategies are adaptive and future-proofed against these.

In its tenth year, the QS International Student Survey has grown to become the world's largest survey of pre-enrolled international students. The 2022 iteration is our largest survey ever, able to draw on the responses of over 110,000 prospective international students from 194 countries and territories around the world. These respondents were collected in partnership with 94 universities and organisations from 21 countries. By analysing the results from this survey, this report seeks to provide a comprehensive outlook on how universities can adapt their recruitment strategies and how to communicate with prospective candidates in an authentic way, on the issues which matter most to them.

With international recruitment cycles now starting to return to pre-pandemic levels, this year's survey seeks to understand the expectations from candidates with regards to the social and environmental responsibilities of universities, as well as attempting to gauge candidates' interest in alternative learning models in the future, such as hybrid learning. The analysis and results in this report will help universities understand the long-term impacts of the COVID-19 pandemic on student decision-making and give them a more in-depth view of the level of support which international candidates are expecting from their universities. The shifting geo-political landscape has also highlighted the potential risks of universities becoming over-reliant on any single market for their international recruitment. The survey continues to highlight how universities can pivot their strategies to diversify their pool of international students and, ultimately, build their resilience against these shifting political currents.

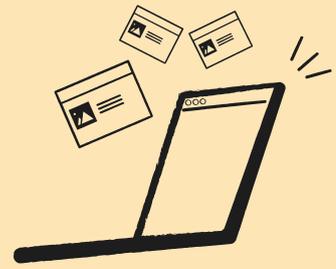


Get a free place for your university in the next International Student Survey

Participation in the International Student Survey is free for universities, and all participating institutions receive a free benchmarking report with useful insights for student recruitment.

For more information visit

www.internationalstudentsurvey.com/take-part



Key facts



110,306
responses



33% Undergraduate
64% Postgraduate
3% Foundation or Vocational



94
institutions participated



24% Business and Management
13% Engineering
8% Social Sciences



194
countries and
territories represented



42% Male
54% Female
3% prefer not to say or prefer
to self-describe

Data is weighted by nationality to reflect current profile of international students worldwide, as reported by UNESCO



30% aged 17-20
33% aged 21-24
35% aged 25 or older



Household income
28% <\$10k
16% \$10k-\$25k
10% \$25k-\$50k
16% >\$50k



Introduction

The pandemic had a profound impact on international student flows, however, the decline in enrolments was not as severe as initially anticipated by many leaders across the higher education sector in 2021. As we emerge from the pandemic, it has become clear that the demand for international education remains as strong as ever. In the leading host destinations, international application numbers in the last academic year have increased further¹. This is in part due to the innovation and flexibility demonstrated by higher education institutions worldwide, having maintained a high level of teaching quality whilst also pivoting their teaching practices.

As the sector looks to regain its momentum, it is now more important than ever for universities to speak to students in a trusted and credible manner about the issues that matter most to them. One of the key themes in this year's report is the growing expectation from students for institutions to go further in terms of their environmental and social responsibilities. At QS, we have been putting more emphasis on helping universities navigate the links between their carbon reduction goals and their international ambitions. This report contains a wealth of data which will support institutions to make informed decisions about their recruitment efforts and support services by understanding the expectations and needs of their prospective students.



“demand for international education remains as strong as ever”

¹ IC3 2021 Paper_International Student Mobility Flows and COVID_2021_08_11.pdf



Recommendations

1 Showcasing environmental impact and social responsibilities to students

Universities can and should do more to demonstrate their commitment to environmental, social and governance (ESG) strategies to students

The next generation of students increasingly expect universities to take an active role in supporting their local communities and the societies in which they operate. There is also an expectation that the higher education sector is at the forefront of developing new technologies to help us all live more sustainably. Whilst it is encouraging that 84% of prospective students regard the sector as environmentally friendly, nearly four out of five candidates we spoke to also said that they expect universities to be doing more to further their sustainability efforts and combat climate change. Universities therefore need to ensure they are communicating as well as improving their sustainability activities across a range of areas. This includes the reduction of single-use plastics and introducing energy efficiency measures to help accelerate progress towards becoming carbon neutral.

As well as highlighting environmental impact, communicating social responsibilities and the support available to students is still important to candidates. A continuing but significant minority of candidates remain cautious about approaching universities for support for their mental health. The enduring stigma of talking about this issue in many locations across the world makes it essential that universities have established procedures and practices in place to cater to different students' needs. Access to professional services in this area, which can effectively prioritise the anonymity of users, is the most effective way to make progress on this issue.

2 Adopting a hybrid approach

Universities should ensure that forms of online learning continue to be available to international students beyond the concerns and restrictions in place as a result of the pandemic

It's important that institutions recognise the perceived benefits and the demand for a hybrid learning experience from a significant cohort of students. Data from this year's survey highlights the appetite for this form of learning among students, with half of all prospective students saying they would be interested in a hybrid learning experience that combines virtual and in-person studying.

Whilst in-person teaching will continue to be the most popular avenue for the majority of international students, universities should look at how they can optimise their alternative learning structures to incorporate online learning. By adopting this approach, it can help to ensure the future resilience of universities in the event of future disruption or as new teaching technologies develop.



3 Continuing to diversify student recruitment

Universities should tailor their recruitment strategies to meet the needs and expectations of different target markets

Different markets will have different priorities when choosing a university, and this should be reflected in the way that student communication strategies are developed. For example, high quality teaching and reputational measures are the most important factors for students from China, while students from India want to know what support is available for graduates seeking employment. It's important for universities to consider their priority markets and ensure they're tailoring messages according to the needs and preferences of those prospective students. It's also important to understand the worries and fears of students from those priority markets. For all the advantages, we must always remember that it's not an easy decision to choose to study in another country and education system. In China, for example, safety remains a major concern and universities should continue to reassure students in their pipeline of everything they do to provide security, support and guidance.

4 Ensuring you're connecting with all key influencers

For effective student recruitment efforts, universities must not only communicate with the candidate, but with other key players influential to the decision-making process

It is not uncommon for candidates to discuss their options with multiple people, including family, agents and representatives from the institution they are interested in. Institutions must be aware that their marketing efforts, while predominately aimed at prospective students, will also be reviewed by a number of other interested parties – all with the power to influence student decision-making. This year's results showed that, for candidates interested in studying overseas, parents remain involved in their decision-making process (with 53% saying they involved parents 'a lot' or a 'fair amount'). They are not only part of the conversation of where and what to study, but also have an influence on the final decision.

Key findings

55%

of candidates believe a welcoming environment for international students is important to them when choosing a country to study in

84%

of candidates believe that universities are either very or somewhat environmentally friendly

78%

of candidates think that institutions could be doing more to protect the environment

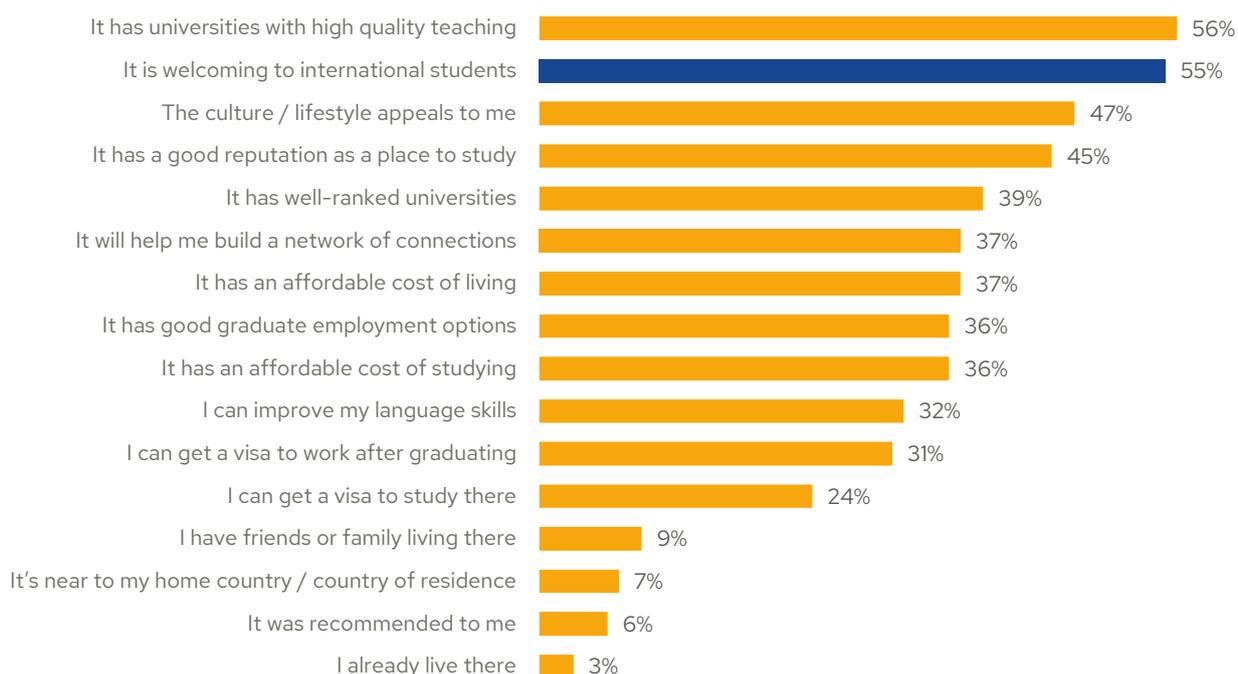
63%

of candidates agree it is extremely or very important for universities to provide support for mental wellbeing

How safe do international students feel when studying abroad?

A welcoming environment for students was the second most popular answer when candidates were asked about their most important factors when choosing a country to study in. 55% of all prospective students identified this as a factor in their decision-making. This focus on student safety also features in their decisions about what town or city they may live in during their studies, which reiterates the extent to which this topic carries through to all aspects of their pre-enrolment journey.

What five things are most important to you when choosing a country to study in?



How universities can communicate their environmental impact credentials

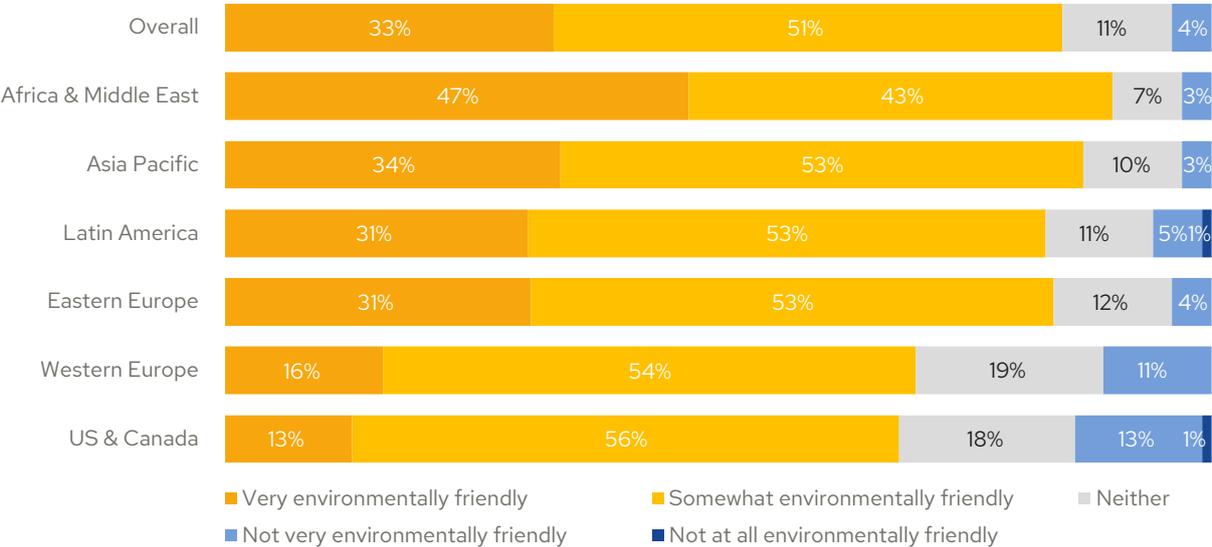
Environmental sustainability is now a critical global issue which affects us all, and the higher education sector is no exception to this. Brands, companies and institutions must now take active steps to communicate their commitments to reducing their carbon footprint and improving their environmental sustainability in response to changing student demands. It is vital to identify the areas where students believe universities should be contributing their efforts to understand how this audience perceives the higher education sector's performance on this issue.

84% of all prospective students believe that universities are either very or somewhat environmentally friendly. The positive findings here reflect well on the sector, and reiterate the findings from the latest Environmental Concerns survey conducted by QS in August 2019. The response of candidates here reflects the dedication of universities to tackle the climate change emergency in their operations, teaching and research and is a clear and encouraging testament to the commitment of those institutions.



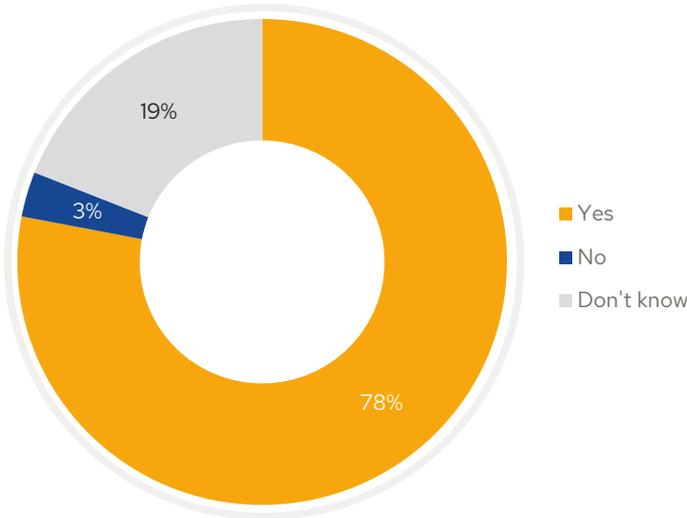
There are significant regional variations in the responses to this question, which are important to note. There are higher levels of scepticism in Western Europe and North America, and it is clear that universities must work harder to show candidates from those territories of their credentials. By contrast, candidates from Africa, the Middle East and those in the Asia-Pacific region all have a broadly positive impression of universities on this issue.

In general, how environmentally-friendly do you think universities are?



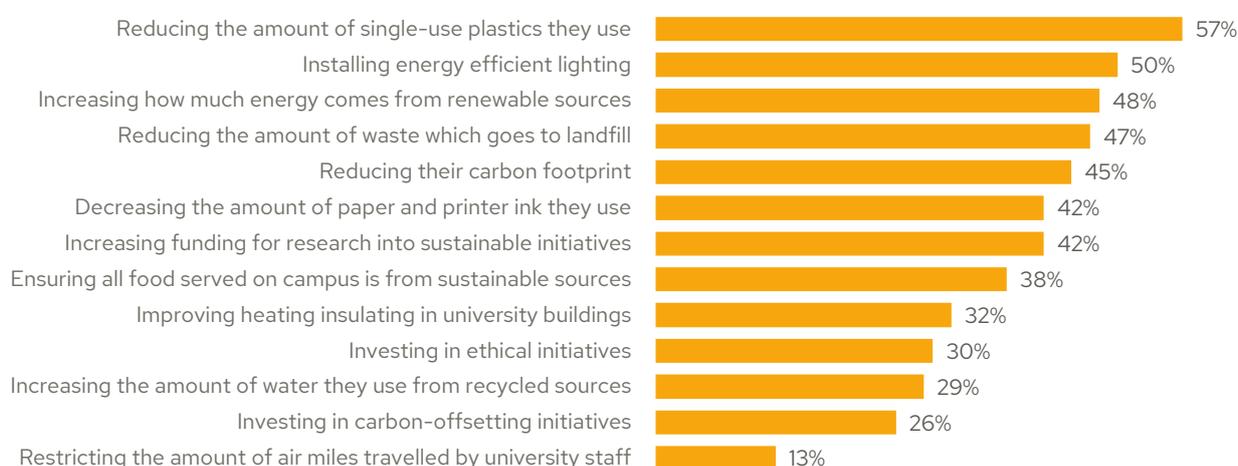
However, the overwhelming majority (78%) of candidates also agree that universities could do more to be environmentally sustainable, despite the broadly positive response to the earlier question. It is clear that prospective students believe there is room for improvement and that universities have a duty to lead the way on sustainability policy, whilst also agreeing that universities do care about the environment. For many candidates, there is an expectation that universities should be conducting new research to tackle the climate change emergency and be at the forefront of developing new technologies.

Do you think universities could do more to be environmentally sustainable?



Candidates were also asked a follow-up question to identify the most important environmental activities they thought universities should be engaging in. The results may be useful for universities when drawing up their marketing and communication strategies, thus reiterating the importance of us answering this question from a candidate-perspective. When considering the results of this question, it is also important to draw the distinction between the research and fundraising initiatives of a university, and their operational activities. The most popular answers – reducing the use of single-use plastics, installing energy efficient lighting and increasing their energy use from renewable sources all relate to the operational activities of a university. This provides universities with ample opportunity to communicate their efforts to students and are all highly important areas. However, it should be noted that one of the most effective ways for universities to engage with this issue is to communicate their funding and research into sustainable initiatives. Universities need to ensure that sustainability is reflected in their programme of research and teaching and that appropriate levels of funding for sustainable innovation are made available, as well as investing in practical initiatives.

What five environmental activities are most important for universities to engage in?



When looking at the results of this question, it is also important to note that there are significant regional differences. Reducing the use of single-use plastics was the most important perceived goal for universities to contend with for candidates from Eastern Europe and Latin America. Candidates from Africa and the Middle East were significantly more likely to prioritise the amount of funding a university allocates for research into sustainable initiatives. Reducing the use of single-use plastics and installing energy-efficient lighting were the most important aspects for candidates from Western Europe.

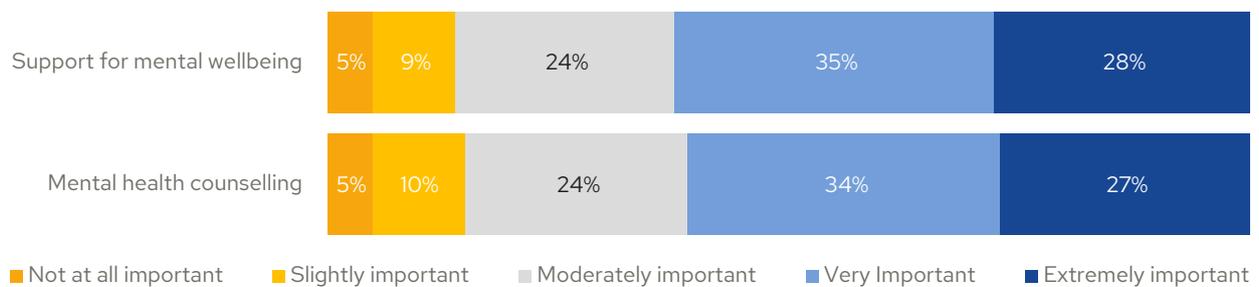
How universities can improve their mental health support for international students

The ways in which universities support the mental health and wellbeing of their students has come under increasing levels of scrutiny following the COVID-19 pandemic. The measures imposed on students in an attempt to combat the spread of COVID-19, whilst necessary, have had a detrimental impact on their mental health. With this in mind, it is important to ensure that university support services are both prioritised accordingly and accessible to all students.

It is important for universities to communicate how they support their students, as our work has made it clear that many students are concerned about the level of health and wellbeing support they might receive when attending university. In the 2022 edition of our International Student Survey, 63% thought it very or extremely important that universities provide services for support with students' mental wellbeing.

The level of scrutiny which the pandemic has placed on this issue has reiterated that mental health and wellbeing services are still very much in demand. We have suggested that international students were generally less likely to reach out for help with their mental health compared with domestic students in our previous edition of the QS International Student Survey, owing to the enduring stigma attached to the issue in many countries. However, it is clear that international students are increasingly concerned about the level of support they might receive when attending university, as shown by the data here. It is important for universities to have targeted and dedicated support structures and that they communicate how they can support students' well-being.

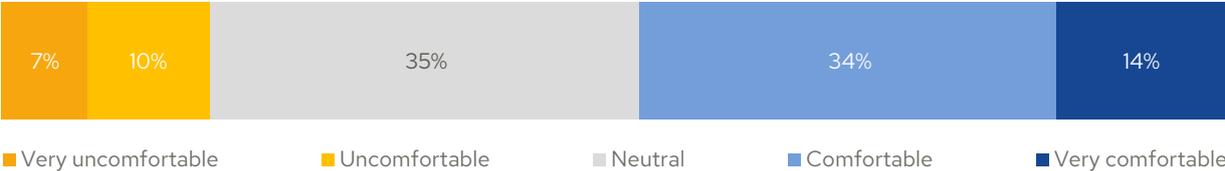
How important is it to you that the university you choose offers the following support services?



The combined pressures of university work and leaving home for the first time, where they are separated from their family and friends, can be enough to leave many international students feeling overwhelmed. For many, the prospect of attending university overseas can be a daunting one. It is necessary to examine how willing these students are to proactively seek out support from a university to ensure that universities are able to support international student cohorts effectively.

When asked about this, nearly half of all prospective students claimed they would be either very comfortable or comfortable coming forward and asking a university for support with their mental health. However, a significant minority (17%) said they would be uncomfortable or very uncomfortable in doing so. This reiterates the notion that due to the stigma of talking about their mental health, a significant proportion of international students may be prevented from seeking help with their mental wellbeing. This reinforces the need for universities to tailor their support services accordingly, due to the heightened reticence to willingly seek out help they when they need it most.

How comfortable would you be asking a university for support with your mental health?



To build on these findings, we asked those candidates who claimed they might be uncomfortable asking a university for support with their mental health why that might be. Many of the responses to this question relate to the stigma of talking about one's mental health in many locations around the world, especially the need to prioritise anonymity when using these services. This reiterates the importance of emphasising this feature in university communications:

“Face-to-face communication would make me feel very embarrassed because it would expose my pain. I think it’s best to provide anonymous or online consulting services which are more convenient and relaxing for me.”

“I would feel uncomfortable asking a university for help with mental health as it is more of a personal health issue. I would feel more comfortable if the university provided off-campus services for mental health.”

“It would be the first time opening up about my mental health and it feels very hard. However, I’d be glad to know the university has this kind of support. I believe that getting to know other students’ opinions about the quality of this support would help me feel more comfortable about asking for help.”

In summary

Universities are increasingly aware of the need to communicate their activities in relation to their social and environmental responsibilities to their students. It is vital that universities have the capabilities to communicate their environmental sustainability efforts across a range of operations to a wider audience. Further, it is clear that whilst universities have made excellent progress with the mental health support they provide to their students, there are opportunities to make further improvements to help address some of the stigma that continues to surround the issue.



Section 2

New ways of learning



Key findings

21%

of candidates are either extremely or very interested in studying online

65%

of candidates think that interacting with other students is 'much more' or 'slightly more' difficult in an online setting

50%

of candidates would find a hybrid learning experience, combining virtual and in-person studying, either very or somewhat appealing

73%

of candidates would be interested in taking part in a student exchange programme

The adoption of online learning platforms has seen a dramatic shift in the last two years. This shift has brought new tools for engagement, interaction and collaboration. It is vital to understand how perceptions of, and interest in, online learning have shifted and to think about the long-term implications of this as we emerge from the pandemic. The potential for new and alternative ways of learning must also be gauged to determine the extent to which they may challenge traditional teaching structures which have dominated higher education up to this point.

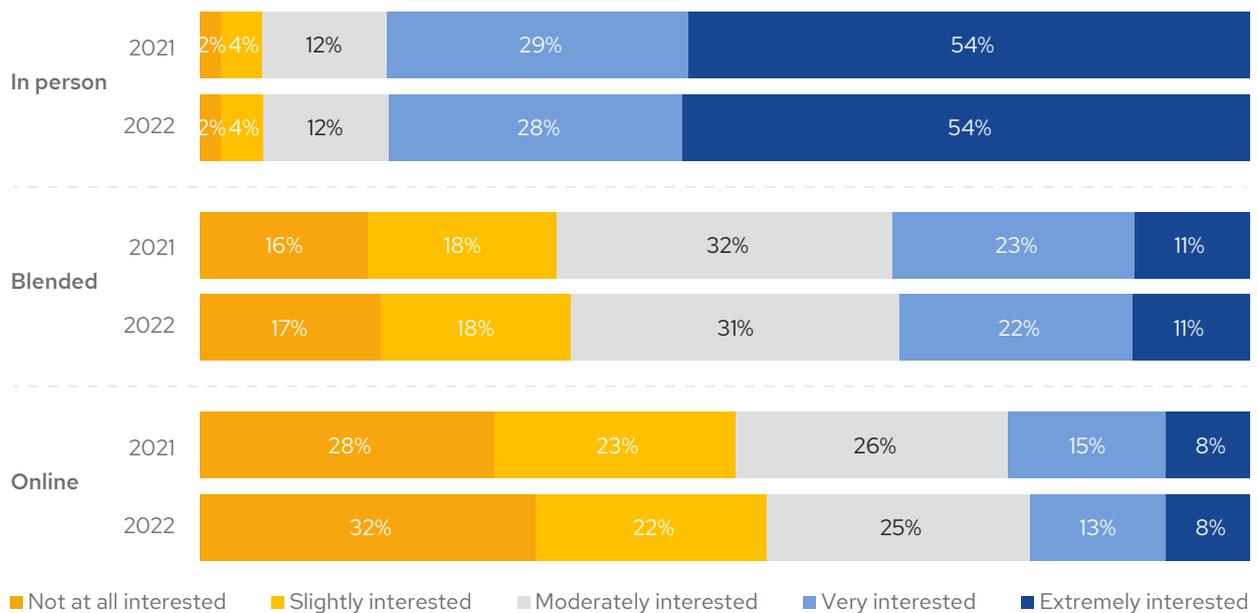
In this section, we analyse how interest in online learning has evolved throughout the pandemic and go on to highlight the perceived benefits, and enduring barriers that limit its adoption. By doing this, we aim to illustrate the potential for hybrid learning and student exchange programmes, and to provide guidance on the long-term role of online learning in higher education. In doing so, we hope to support universities' long-term planning and resilience by demonstrating how universities can optimise their alternative learning structures.

How has interest in online learning evolved in the last two years?

32% of all candidates have no interest in studying online when asked how interested they would be in studying for their degree via a variety of online platforms. 21% of prospective students claimed to be either 'extremely' or 'very' interested in online learning. This represents a slight decline on the 23% who were interested in 2021, which suggests the pandemic has done little to enhance the long-term potential for a purely virtual learning model. This is compounded by the fact that there has been an increase in those who are not at all interested in online learning from 28% in 2021 to 32% in 2022.

There is significantly greater interest in a blended learning model which combines distance and on-campus learning. 33% of candidates would find this form of study either somewhat or very appealing. Whilst in the medium-term, in-person teaching is by far the most popular avenue (and is likely to continue to be popular), there is a growing cohort of candidates who are actively seeking a blended learning approach.

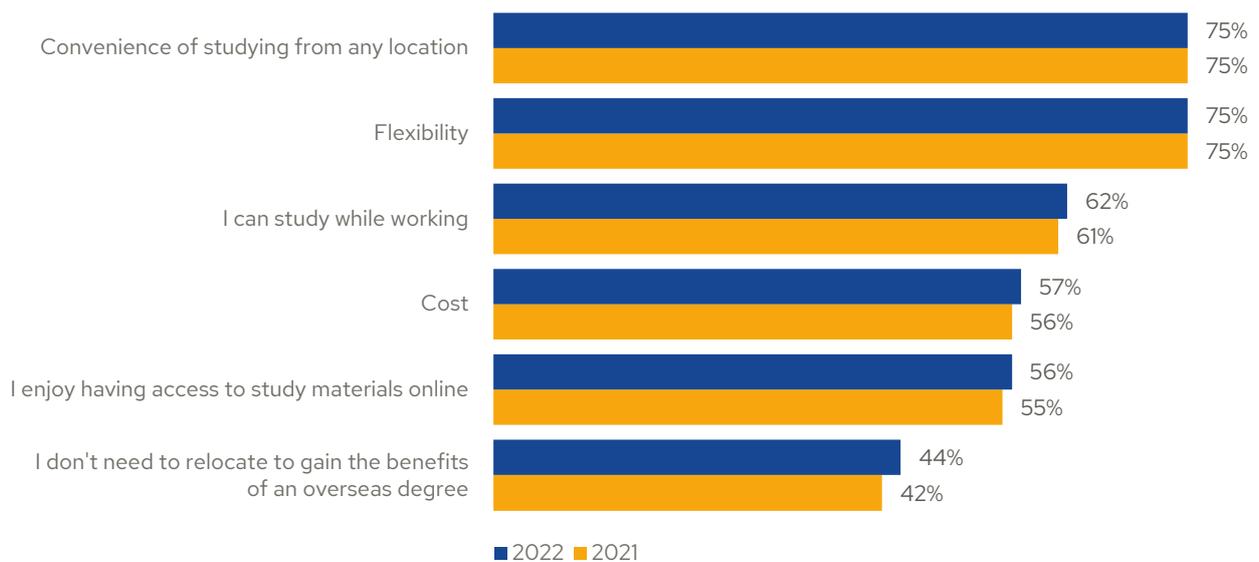
How interested are you in the following delivery options?



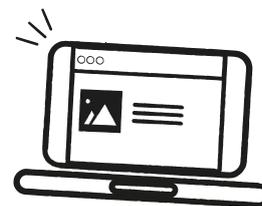
What are the key motivating factors of those students who want to study online?

For those who showed an interest in online study, we asked them to explain why online programmes were an attractive option for them. The top three answers were the convenience of studying from any location, the flexibility it offers and the advantage of being able to study while working. The prominence of these perceived benefits remains strong and has shown little year-on-year change.

Why are you interested in studying for an online degree?

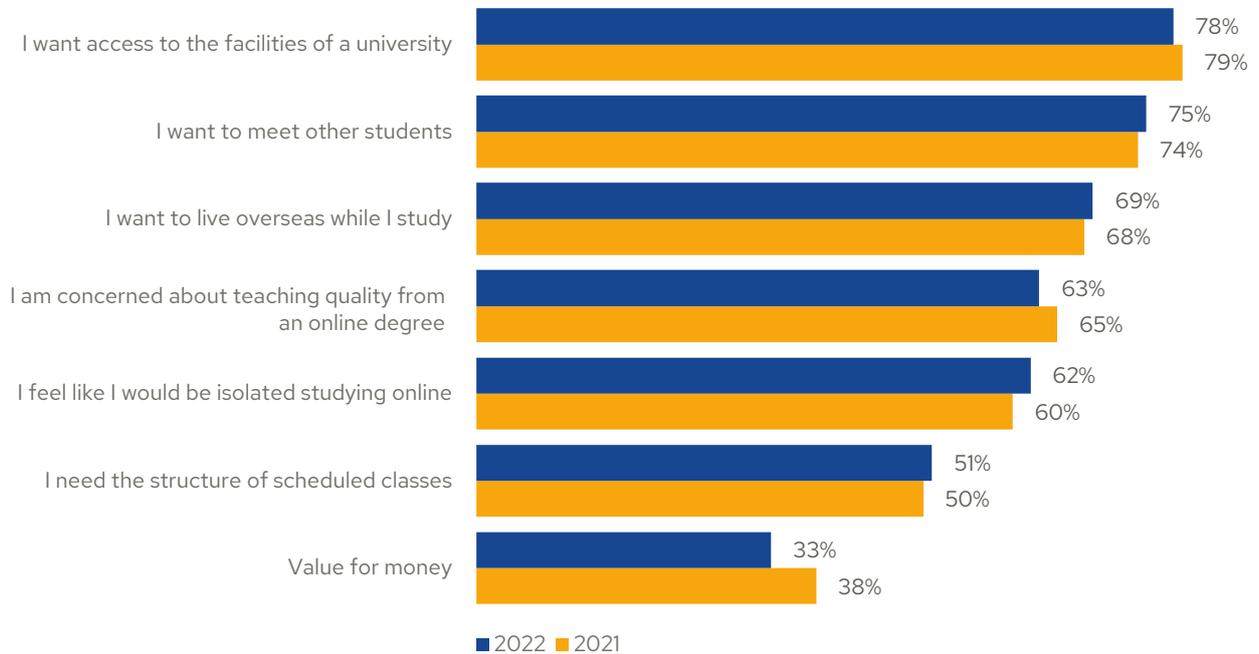


We also asked those candidates who weren't interested in studying for an online degree why that was the case. 78% cited the lack of access to university facilities, and it remains the most prominent barrier. Wanting to meet other students (75%) and living overseas while studying (69%) were other significant



responses. Value for money is seen to be less of a barrier compared to 2021. This could be an indication of the efforts which many institutions have made to improve the quality of their online programmes, however it remains to be seen whether this is a longer-term trend.

Why are you not interested in studying an online degree?



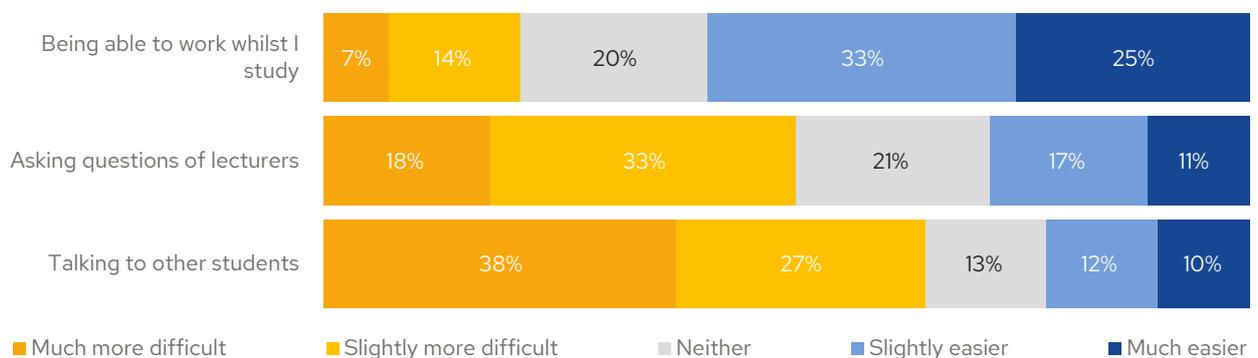
When planning any online programme delivery, universities can consider how they might mitigate these barriers for students who continue to see face-to-face as the ‘gold standard’ for learning. Partnerships with international universities, for example, might be one way to ensure that students still have access to facilities, such as laboratories or specialist equipment, while studying an online course. Online social and networking opportunities are also important to include in any online course planning to help students to develop relationships with their peers and interact socially as well as through their studies.



What aspects of their degree do candidates regard as being most different in an online setting?

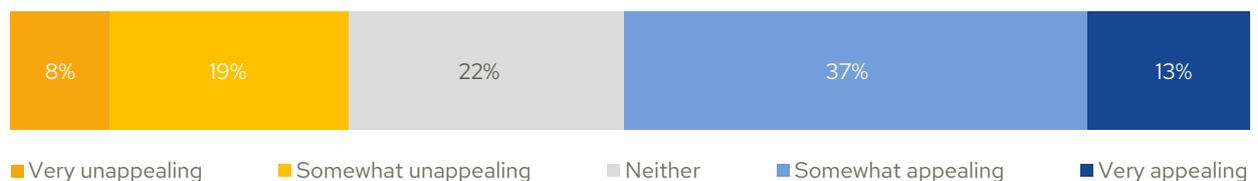
Interactions with other students are perceived to be more difficult in an online setting by 65% of all candidates, whilst 51% also believe that asking questions of lecturers is more difficult in an online scenario as well. This further reiterates the notion that one of the most prominent barriers to online learning is its impact on social interactions and that this is preventing more students from opting for online programmes.

Do you think the following aspects of studying online are easier or more difficult compared to on-campus learning?



When asked what they thought about a hybrid approach which combines virtual and on-campus teaching, 50% found the notion to be either very or somewhat appealing. This reiterates the notion that a model which might combine online and in-person learning experiences would generate significantly greater interest than a purely online learning model, which is not regarded as a viable alternative.

How appealing do you find the idea of a hybrid learning experience, which combines virtual and on-campus teaching?



As a follow-up, we asked candidates who were not interested in a hybrid learning model why that was the case. Many of the responses focused on the experience of in-person interactions with students and staff which they found to be more valuable:

“A subject must be learnt holistically - with the ability to make use of all facilities, and types of equipment. Face-to-face learning opens up the opportunity to learn by experience and by trial and error. It improves the teacher-student relationship, letting them know more about us and thereby have more faith in us while assigning challenging responsibilities. Also, online education or even a hybrid education does not do complete justice and removes the value of the expensive fees paid for the “valuable” education that we consciously chose to study overseas.”

“I believe learning is more effective when it can be done face-to-face in a physical atmosphere where I will be able to create friends and group-mates as well which will help me learn new things that I might not learn when that is done online by myself.”

“I prefer learning in an academic environment instead of remotely. I believe it leaves me more focused and motivated. Additionally, it’s easier for me to retain information face-to-face, online learning is much less personal and, in my opinion, less effective. Being able to debate and discuss the content covered is also a huge part of learning and the online experience makes this much more challenging.”

It is important that universities engage with students, so that when seeking to promote online learning or hybrid learning structures they have a realistic understanding of the elements of their degrees which could most effectively be replicated online. Many elements of the learning experience continue to require a face-to-face element and it is equally important to acknowledge this. There is clearly work to be done to convince all prospective students that the crucial parts of a degree, namely the interactions between staff and students, can be replicated online.

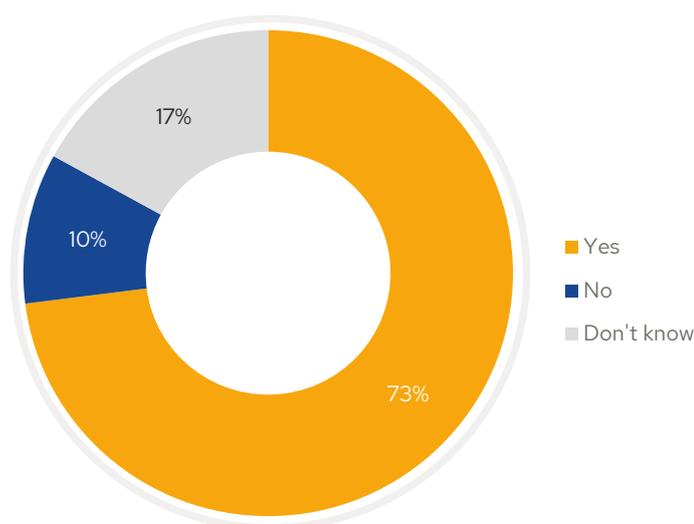
How many students are interested in student exchange programmes?

Increasing numbers of students are now taking advantage of the opportunity to study abroad as part of their degree, with an array of student exchange and international placements now offered at universities worldwide. We presented candidates with a short description of student exchange programmes and asked whether they would be interested in taking part in one, to gauge the relative popularity of these student exchange programmes:

A student exchange programme is an opportunity to spend a period of time (e.g. a semester or a summer) studying at one of your university's international partner institutions.

73% of international candidates said they would be interested in taking part in a student exchange programme as part of their studies. It is important that universities consider the different ways which international students might experience their programmes and campus, and become increasingly flexible to manage this.

Would you be interested in taking part in a student exchange programme as part of your studies?



To build on these findings, we also asked those candidates who would be interested in student exchange programmes why this was the case. The potential to discover new cultures and communities and the ability to establish new friends and connections were the most popular perceived benefits, with 73% and 66% selecting these options respectively.

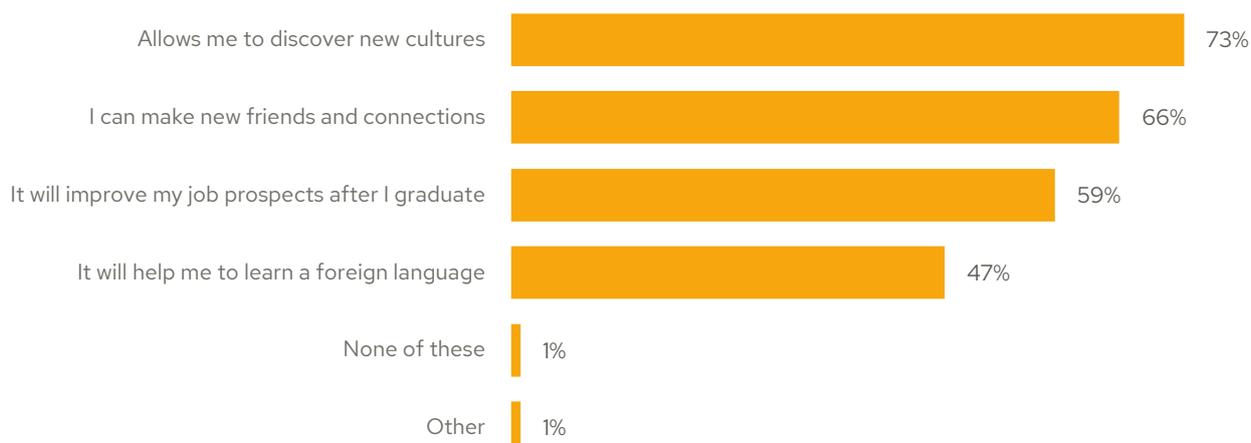
When asked to explain more about the reason they were interested in a student exchange programme, respondents cited opportunities to broaden their cultural experience as well as opportunities to demonstrate their adaptability to future employers:

“I have previously taken part in an exchange programme during my undergraduate studies. It has been an enriching experience both academically and culturally. Therefore, I would love to take part in an exchange program again.”

“Because it’s a good opportunity to learn a new language, and also learn about other cultures. Besides, it can be preparation for studying overseas on a longer basis, I think it’d help me to figure out whether I’m ready to start a master’s or PhD in another country or not.”

“It would be nice to try others Universities and cultures, with different teachers and colleagues. If the country has a good reputation on my job preference, it would be nice to have it on my CV as well.”

Which of the following are the reasons that you're interested in a student exchange programme?



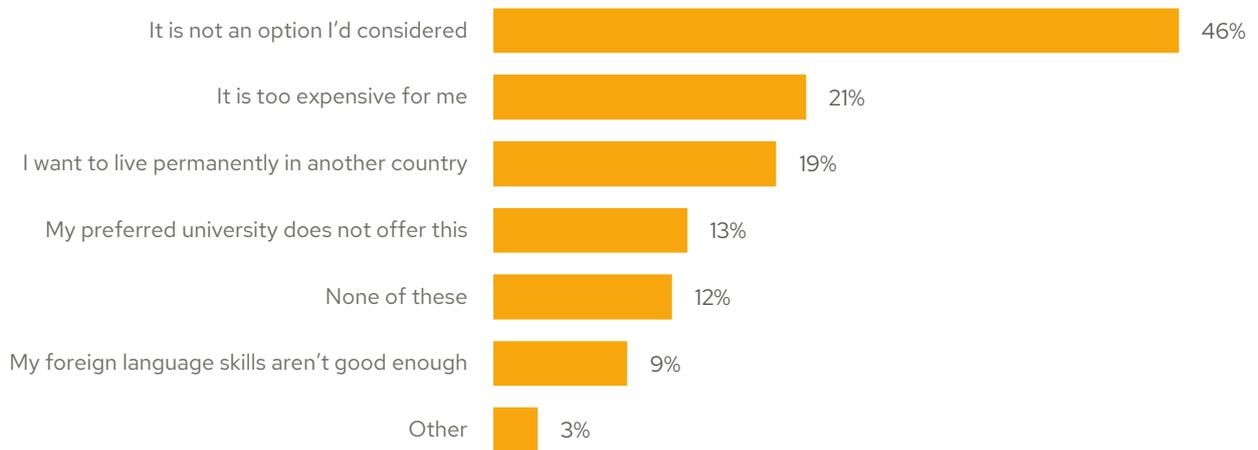
We also asked those candidates who weren't interested in student exchange programmes why this was the case. That it wasn't an option they had considered was the most prominent barrier, with 46% of candidates selecting this option. However, when asked to elaborate on why they were not interested in an exchange programme, the main reasons for a lack of interest related to the fact that this option would feel too short for them and would disrupt their longer-term study plans:

"I consider myself to be a very rigid individual. Knowing that I will only be at a particular university for a limited period will deter me from establishing friends and adapting to the culture of the new environment because I know the experience will be short-lived."

"I want to spend the short amount of time I get during post graduate by building relations with faculty of a college. An exchange programme will further reduce the face-to-face exposure with faculty of a single college, thus taking away any chance of creating a professional relationship with them. Of course, I will meet more people, but chances of creating worthwhile connections are lower, when the time spent with them are divided between colleges."

“I think staying in one institution has more career network opportunities compared with exchange programmes.”

Which of the following are reasons for you not being interested in a student exchange programme?



In summary

Students and universities have been provided with an opportunity to reflect on the benefits and shortcomings of online learning by the pandemic. The perceived lack of interaction between students and lecturers over online programmes is something which universities must consider how to mitigate.

Universities considering the introduction of online or hybrid programmes must find ways to convince students of the value of feeling part of a learning community (which they currently feel cannot be fully replicated online). It's also worth considering the levels of interest in student exchange programmes, and whether there is capacity for increasing links with international partner universities.



Section 3

Graduate outcomes and finding employment





Key findings

41%
of candidates plan on remaining in the country of their studies temporarily after graduating from university

59%
of candidates claim that being able to learn new skills is the most important career consideration when choosing a course

70%
of candidates believe that problem-solving skills are the most sought-after skillset by potential employers

56%
of candidates cite a high graduate employment rate as the most important graduate outcome metric when choosing a university

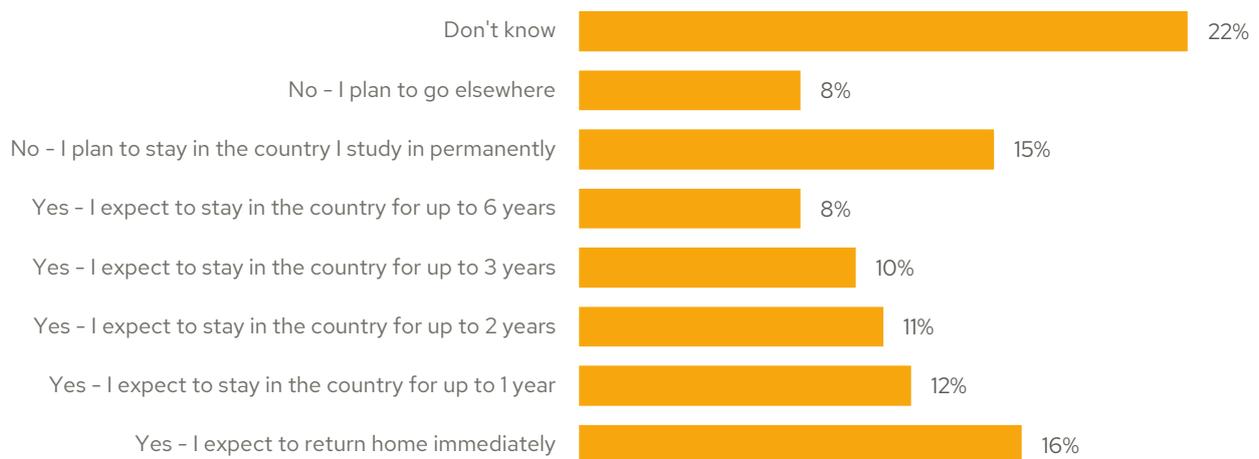
In this section, we explore the post-study plans of prospective international students wishing to study overseas – whether they plan to remain in the country of their studies and in what capacity. To build on this, we also evaluate the employment plans of candidates more generally and consider the characteristics they look for in a potential employer.



What are prospective students' plans for remaining in the country of their studies after they graduate?

Prospective student decision-making is significantly affected by the post-study work rights of international students, which varies considerably from country to country. For prospective international students, 16% expect to return home immediately, 41% expect to remain in the country of their studies for between one and six years, with a further 15% planning on remaining permanently in the country they study in. A further 22% were undecided on their post-study plans.

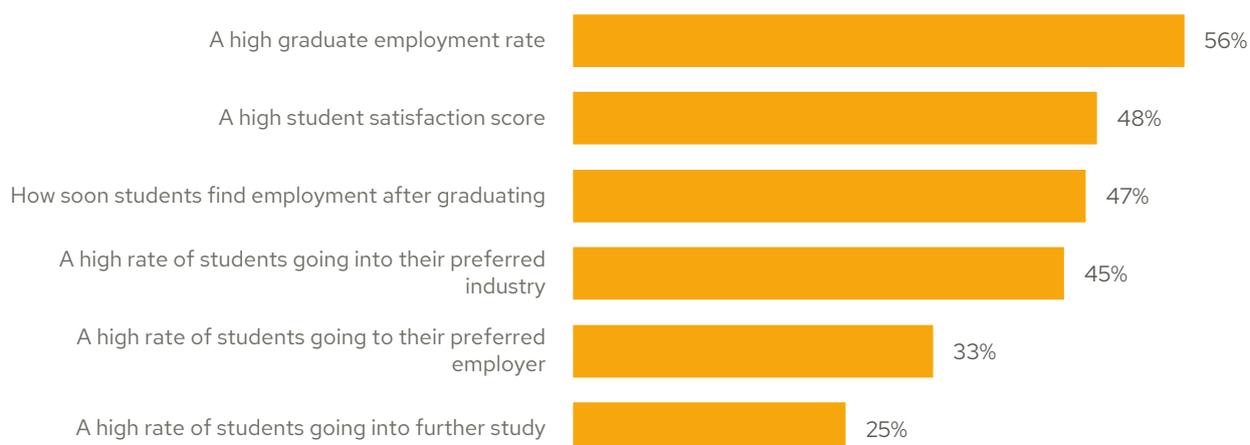
Do you expect to return to your home country after completing your course?



Given the fact that so many hope to remain in the country of their studies either permanently or temporarily, finding employment after they graduate is a key focus for the majority of candidates. The graduate employment rate (56%) is the most important graduate outcome measurement that candidates consider when choosing a university, followed by a high student satisfaction score (48%) and how soon students find employment after graduating (47%).

With this in mind, it is clear that universities must consider how they can communicate the support they offer to future and current students, such as their career services and how they can effectively support graduates with the transition into employment, with a particular focus on post-study work visas.

When choosing a university, what are the top three most important measures when thinking about graduate outcomes?



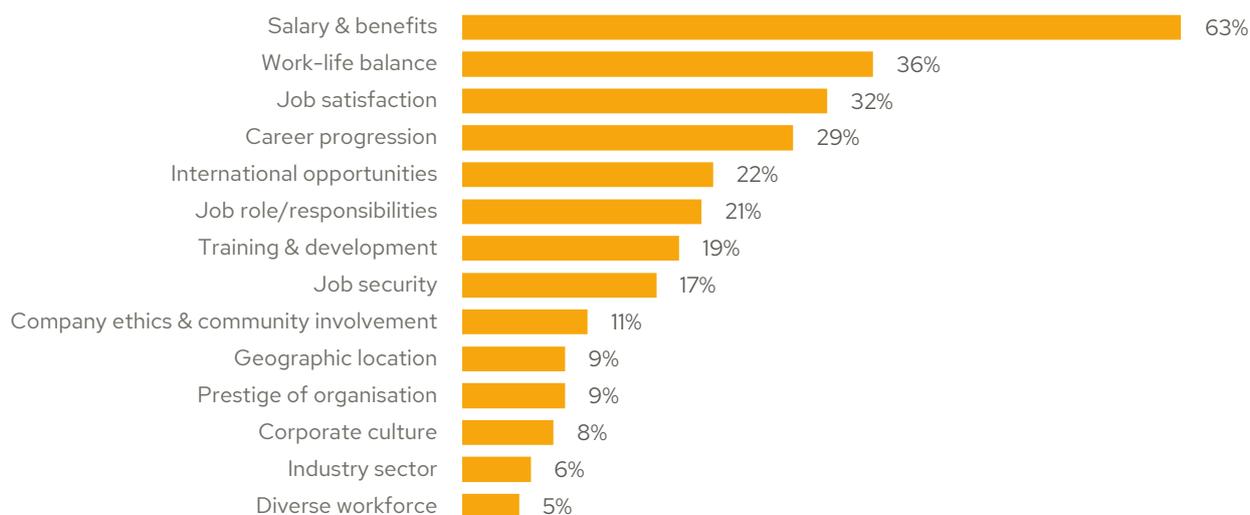
What do prospective students consider when choosing a potential employer?

One of the primary considerations for many candidates when making decisions about their studies is that their course helps them to launch or take the next steps in their chosen career path. 63% of candidates also cited salary and benefits as the most important factor when it comes to choosing an employer. It is vital that prospective students are well informed about what they can expect to earn in their first year of employment and that universities and employers alike both appreciate the extent to which this factor determines candidate decision-making. Universities must ensure that graduates have a comprehensive view of the value their degree can bring in the short term by helping to educate their students and to give them a more realistic appreciation of what constitutes a 'good' salary to them.

36% of candidates also highlighted the importance of a good work-life balance. It is worth noting this has increased from 31% in 2021 and 30% in 2020, which would suggest the successive cohorts of students are increasingly aware of the detrimental impact an imbalanced work-life structure can have on their mental health and of the dangers of overwork, resulting in burnout. When it comes to attracting high-quality, international university graduates, those employers who can demonstrate their support in helping their employees achieve a good work-life balance will benefit more.

Job satisfaction (32%) and career progression (29%) were other factors to emerge as being important. This further reiterates the necessity of employers being able to communicate the ways in which graduates can progress within their organisation as well as their employees' job satisfaction, as these are significant factors for students.

Please select up to three factors you'd consider when choosing an employer



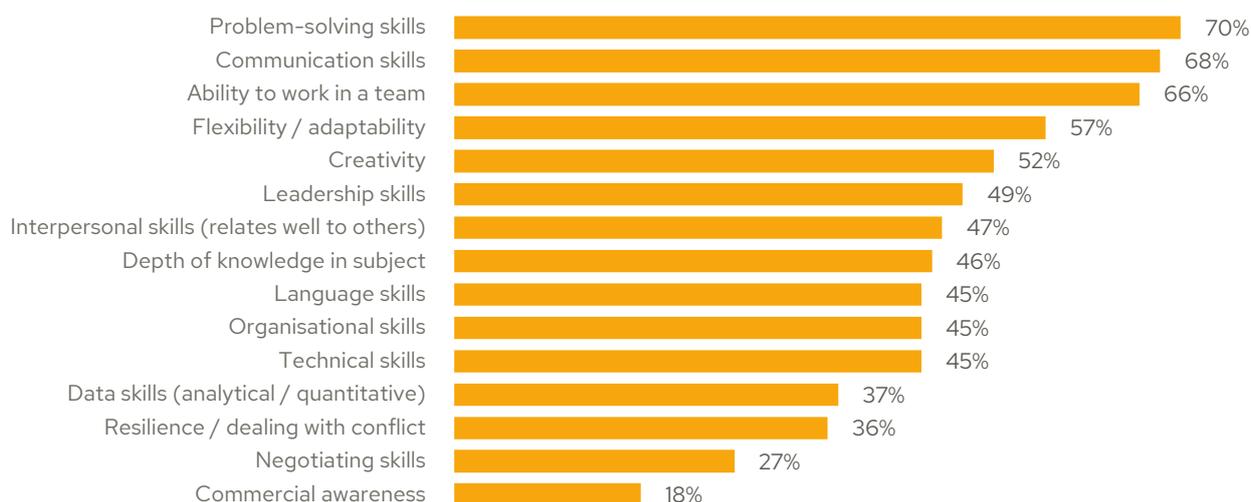
To build on these findings, we also asked candidates to think about their most important career considerations when it comes to choosing a course. The most important consideration for this audience was that their course allows them to learn new skills, with 59% selecting this option, closely followed by the ability to progress to a higher level qualification (53%) and gain international experience (51%).

Thinking about your future career, what considerations are most important to you when choosing a course?



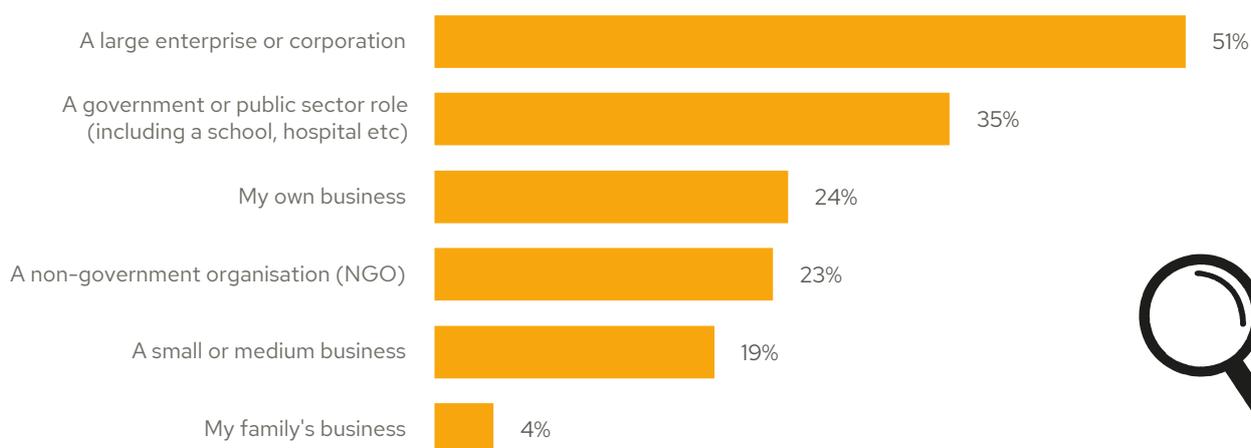
Next we asked candidates to evaluate which skills they believed employers valued most in new graduates. The skills seen to be of greatest use to employers were problem-solving (70%), communication (68%) and the ability to work in a team (66%). In highlighting these, we hope to help universities to support their students and graduates to find employment by providing them with a more comprehensive framework for how to adapt their course structures and help career services within universities.

What skills do you think employers value most in new graduates?



Finally, we asked candidates what kind of organisation they would like to be employed in after completing their studies. Over half of all respondents would like to be employed in a large enterprise or corporation (51%), while over a third would like to be employed in government or public sector roles (35%). To facilitate this, it is important that universities take note of global trends in the skills and aptitudes which major organisations are looking for and that university career services continue to work closely with employers.

What kind of workplace would you like to be employed in when you have finished your studies?



In summary

To support their student populations to find employment, universities are increasingly being challenged to improve their offering. For those students who have ambitions to remain in the country of their studies after graduating, career support services are going to be crucial in providing this assistance. Given that candidates have expressed an interest in working in a full range of workplaces, it is vital that careers support extends across a full range of areas, from large corporations to public sector roles as well as the entrepreneurial skills needed to run a business.



Section 4

Priority markets: understanding candidate decision- making where it matters most





Key findings

High-quality teaching, a good reputation at a subject level and a welcoming destination for international students are all important factors to candidates from the main international student markets

Information about teaching staff and work experience, practical tips to help with their applications as well as avenues to connect with existing international students are all useful topics to include in a university's marketing communications

The cost of living, student safety and concerns over getting a job after graduating are all significant sources of concern for prospective students from the main international student markets

In this section, we analyse the responses from prospective students from the biggest markets for international students and discuss their decision-making priorities and preferences.

What are their most important priorities when choosing a university?



China: In addition to the quality of teaching (which is the most important factor), it is worth noting that a university's reputation, both at an overall and a subject level, remain important to candidates from China. Showcasing strong performance at a subject level in subject rankings, through promotional channels and materials is worth considering for all institutions. Universities can build their reputation among prospective students by communicating a strong institutional or subject ranking position. Our research has shown that in the minds of prospective students, a university's ranking and reputation are closely interlinked.

India: The availability of scholarships is a major priority for candidates from India, reiterating the notion that it remains a price sensitive market. Universities which communicate the strength and innovation of their lecturers and teaching practices will connect well with candidates from India by demonstrating their teaching quality credentials. Graduate outcomes and employability remain important as well, as

a good careers service and a high graduate employment rate are both among the top five priorities. Demonstrating how graduates have been supported in starting their careers will effectively convince Indian candidates of a university's credentials in this area.

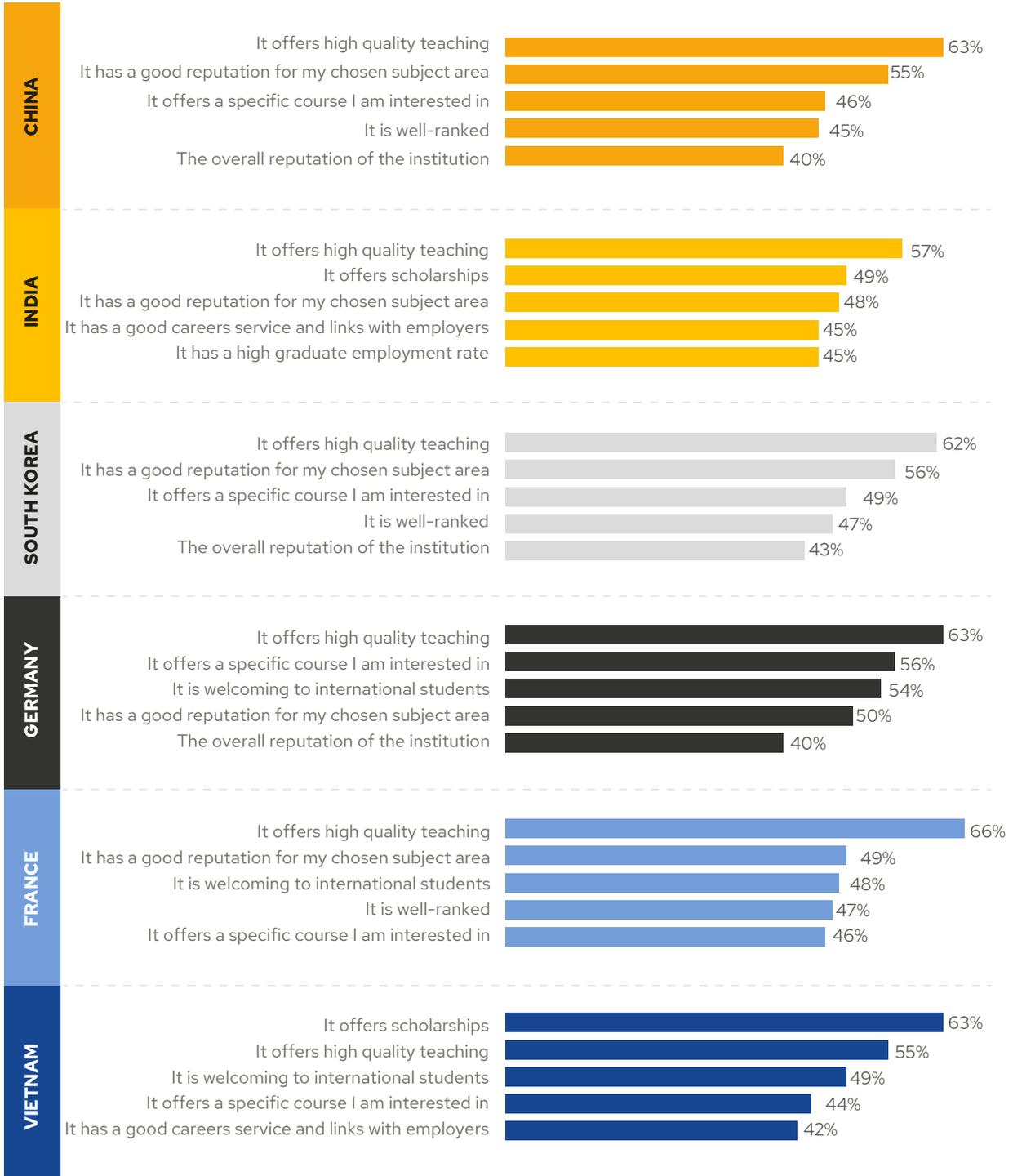
South Korea: The quality of teaching again is the most important factor. As with candidates from China, reputation and performance in rankings are also key priorities for this audience. Demonstrating institutional performance both at an overall and a subject level will go far in convincing candidates from this territory of their teaching quality credentials.

Germany: As with other markets, high quality teaching is an important factor when communicating with candidates from Germany. The second most important priority is the availability of a specific course, which reiterates the importance of targeted promotion of any unique or new additions to an institution's course portfolio. A welcoming environment for international students is also key, so any targeted initiatives

which aim to help international students integrate themselves into their new surroundings will be well received by this audience.

France: High quality teaching is by far the most important factor for candidates from France. A good reputation at a subject level is also key and strong performance in independent rankings can help to communicate this. A welcoming environment for international students is also important and can be communicated by showcasing the size and depth of an institution's international student community in their marketing.

Vietnam: Reputational factors are less important to candidates from Vietnam. The availability of scholarships and a welcoming environment for international students are preferred over these, which reiterates its status as another price sensitive market. Employability is once again an important factor with a good careers service also making it into the top five.



Which of the following are most useful to you when making decisions about your studies?



China: Information about teaching staff experience and qualifications is the most useful marketing communication for candidates from China. Understanding who they are and information about their background is highly valued by this audience, especially any experience outside the world of academia. Stories about current and former international students are also well received, as peer-to-peer advocacy carries significantly more weight than any recommendations imparted by the university itself.

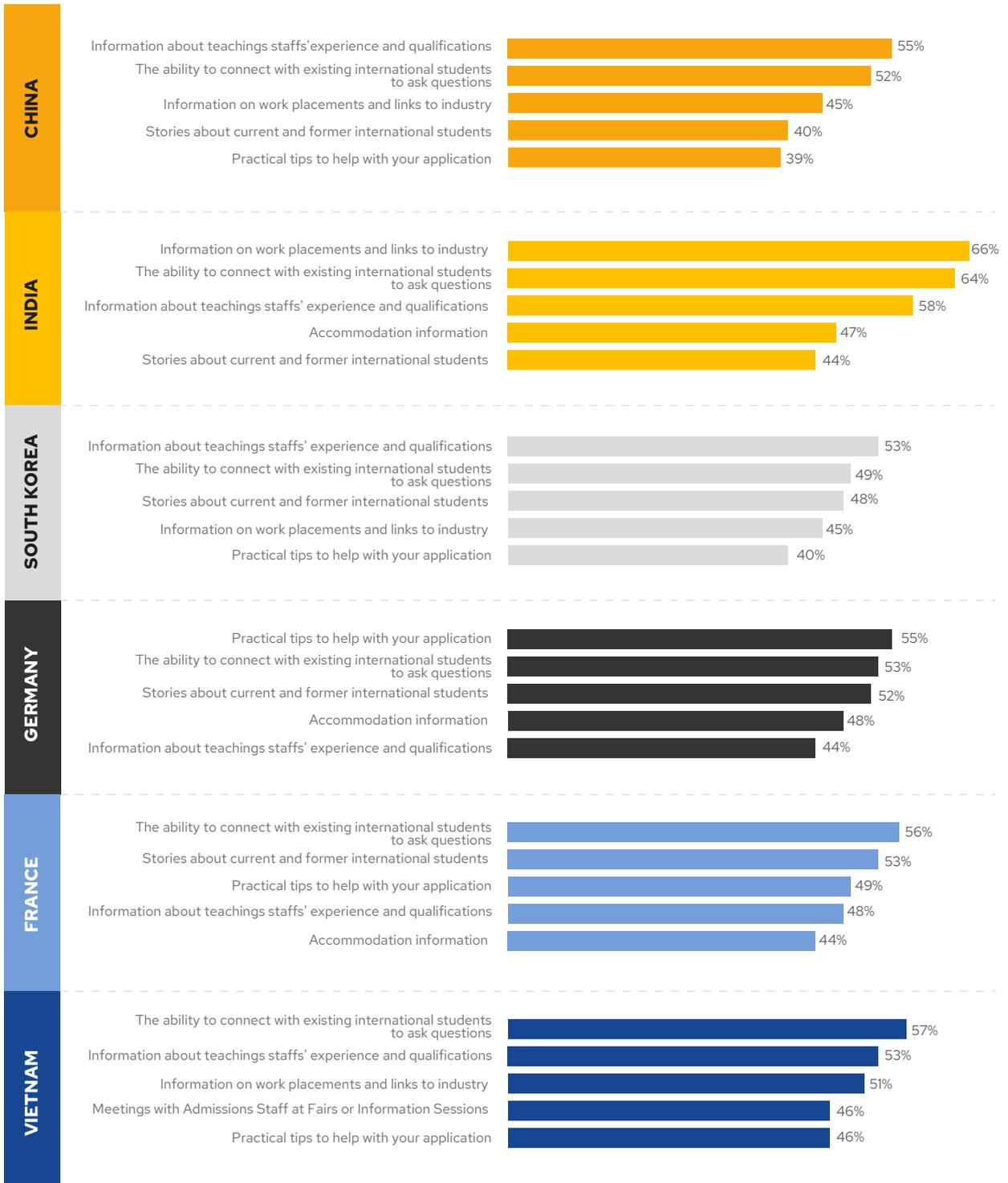
India: Information on work placements and links to industry are the most valued topic by candidates from India (reiterating the importance of this issue when choosing a university). Gaining an understanding of how a university supports its students with work experience both during and after their studies is crucial for this audience. Accommodation information is also highly valued and is seen as a key part of the student experience.

South Korea: As with candidates from China, information about teaching staff experience and qualifications are the most desired marketing communication to candidates from South Korea. Making it easy for candidates to explore lecturers' backgrounds will be highly valued by this audience.

Germany: For candidates from Germany, practical tips to help with their application are the most valued marketing communication. Knowing how to optimise the process and how to find out what selectors are prioritised most when reviewing an application will most effectively convert this audience along the conversion funnel.

France: The ability to connect with existing international students is what candidates from France value most. Our research on peer-to-peer engagement has shown that often the reason they prioritise this is to get an impression of the social aspects of attending a university – campus life, clubs and societies are what this audience will respond to in marketing communications.

Vietnam: Candidates from Vietnam also value the ability to connect with existing students and are the only major market to include meetings with admissions staff at fairs or information sessions as a key element they would like.



What worries you most about studying in a different country?



China: Safety is the most prominent concern for candidates from China (71%). It is important to include messages of reassurance to students and their parents about everything in place to support student safety and wellbeing, clearly outlining which services are available and how to access them. Academic pressures are a significant secondary source of worry, so any specific support services which provide academic or study support would also be likely to resonate well.

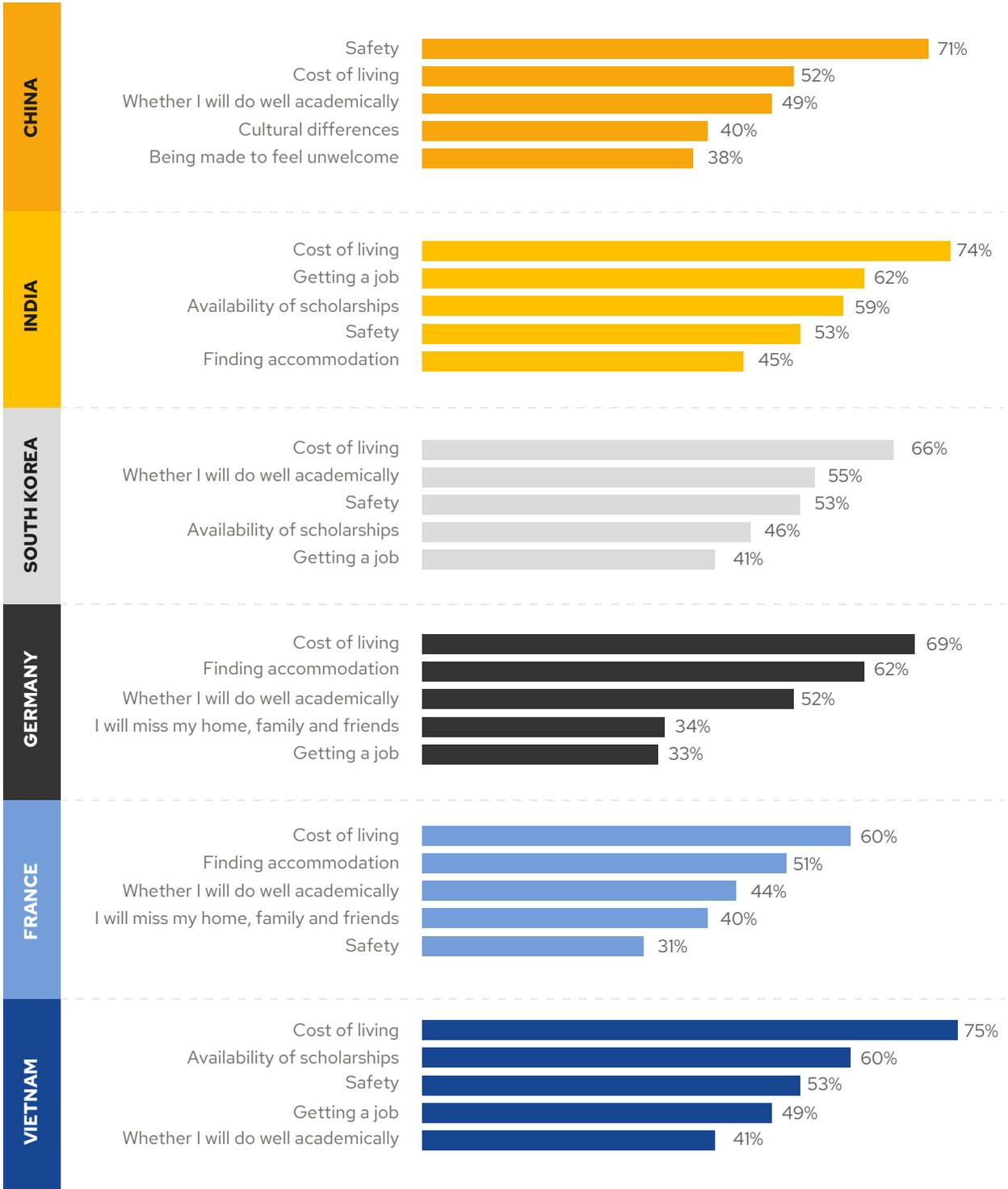
India: Cost of living is the main driver of concern for candidates from India, however, getting a job is also a significant source of worry for them. We have seen the importance of a high graduate employment rate and a good careers service when choosing a university, so it may be unsurprising to see concerns about getting a job also emerging here. By communicating employment opportunities both during and after their studies, universities can help to alleviate these worries.

South Korea: Outside the cost of living, which is a prominent concern, candidates from South Korea also cite concerns about academic pressures and whether they will do well or not. Any additional support which universities are able to provide with their studies will be positively received by this audience.

Germany: Cost of living is also the most significant source of worry for candidates from Germany, however finding suitable accommodation is a prominent secondary concern. Communicating the accommodation options available to candidates during their studies and the support they can provide for students looking to rent from private landlords is a key message which needs to be employed by universities.

France: For candidates from France, cost is a worry. The cost of living (60%) and finding accommodation (51%) are both significant concerns which may well be related to concerns over the price of day-to-day life. A significant number of prospective students (44%) are also concerned about whether they'll do well academically so it's important to reassure students from France of any support services available to help them adapt to a new education system alongside any cost-of-living or accommodation support.

Vietnam: Cost is once again the overarching worry for students from Vietnam. Cost of living (75%) is the major concern followed by scholarships (60%) and getting a job (49%). 53% of prospective students also mentioned safety as a worry so it's also important to highlight everything in place to provide security and support to students on campus.



In summary

While it's not always possible to adapt messaging for every market, it's important to understand the differences in concerns, preferences and expectations. It is worth considering which markets are the most important to achieving institutional objectives and ensuring prospective students from those markets have their needs met as much as possible. Where geographical diversification of international student markets is a key objective, it's worth taking the time to understand how marketing strategy and tactics may need to be adapted to appeal to students in those markets.



Key findings

67%

of candidates will speak to their parents about their study options, with 53% claiming their parents have 'a lot of' or 'a fair' amount of influence on their decision-making

56%

of candidates will speak to their parents about their choice of country to study in

37%

of candidates believe that student safety is the topic which their parents are most concerned about when making study decisions

62%

of candidates believe international education agents are a trusted source of information on studying overseas

The decision to study abroad can make deciding which university to attend an exponentially more challenging one. Not only do prospective students have to assess the employment, safety and logistics of studying in a particular country (all from a distance), but they also have to decide which university to attend.

Candidates will discuss their options with a range of individuals, from family, agents and representatives from selected institutions, included in conversations at one point or another. A number of interested parties will review institutional marketing campaigns, even though they are predominantly aimed at students. In this section we determine who has the most influence on student decision-making and in what areas.

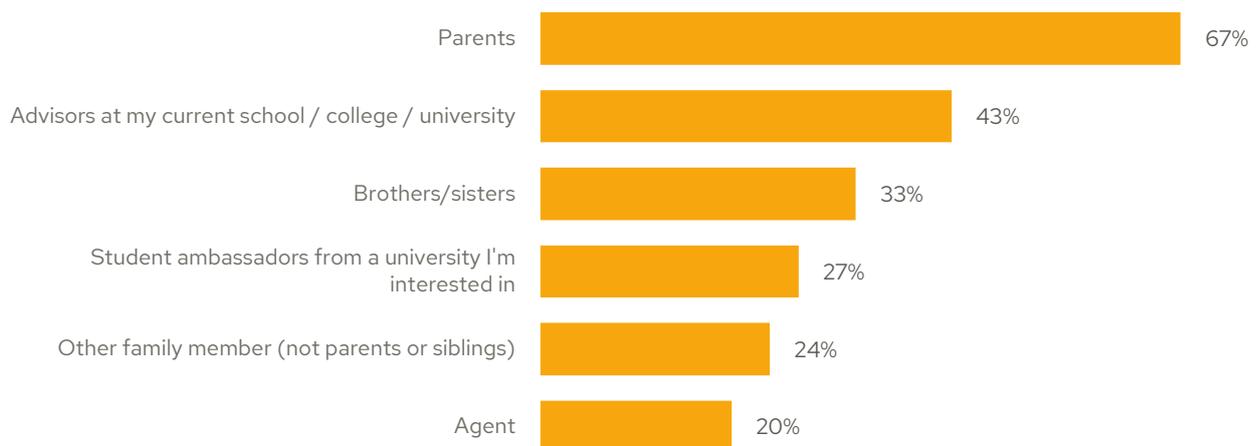
How much influence do certain individuals have on student decision-making?

Parents are the most significant source of influence on candidate decision-making, with 67% of candidates discussing their study options with them. Parents are most likely to provide emotional guidance and support and advise on which institutions or country is the best fit for the student, as well as having the best understanding of their child’s interest, fears and aspirations.

Advisors are another significant source of influence, as they can provide practical advice on whether a student’s learning and career goals will be met by a particular institution by using their expertise in education and their relationship with the student. 43% of respondents have discussed or will discuss their study options with an advisor at the institution they are currently in, suggesting that candidates particularly trust the advice of the education expert they are already familiar with.

Only a fifth of all candidates will discuss their study options with an agent. Given that not all countries utilise agents to the same degree, this may be unsurprising however. Later in this section we will take a more in-depth look at the candidate-agent relationship, including at what stages of the decision-making process agents provide the most value and why.

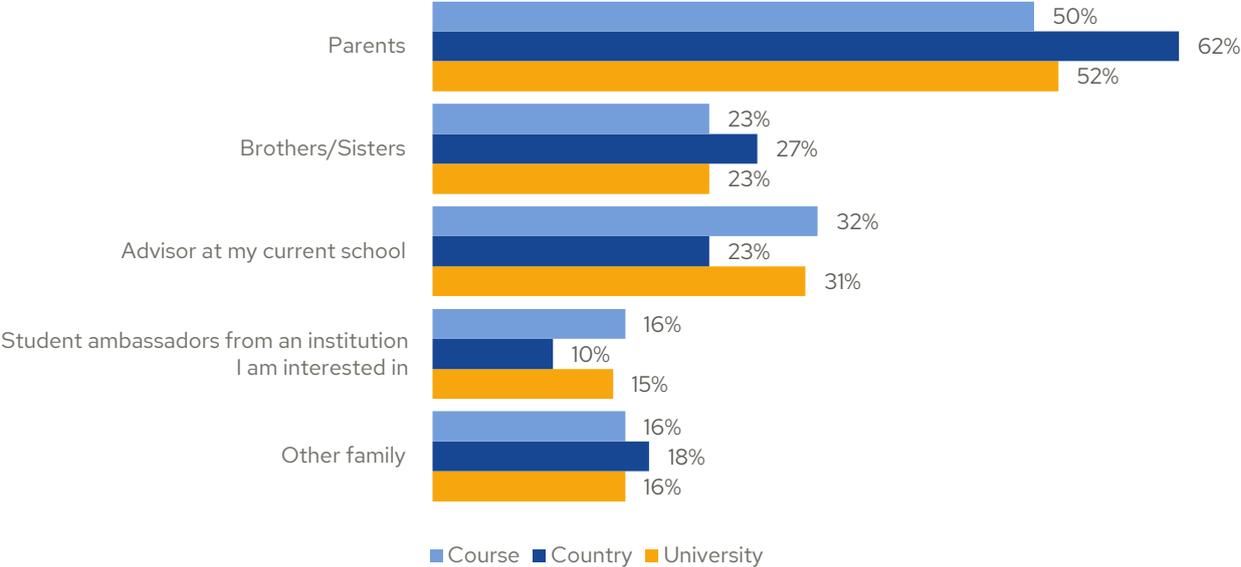
Have you or will you discuss your study options with any of the following?



The focus of each decision which needs to be made in relation to their studies can determine which individuals candidates will speak to throughout their decision-making process. Whilst candidates will speak with parents about a full range of aspects, it is their choice of country that they are especially likely to speak to them about. This reiterates the notion that students are more likely to utilise their personal relationships to help make decisions about factors outside of study itself, particularly with the destination country having such an influence on the wider study-abroad experience for the candidate, including safety, cost and culture of a destination. It is arguably the elements that have a broader impact on a student’s time away, outside of their studies, that are more significant in these discussions, whilst also acknowledging that course and institution are still significant points of discussions between family and candidate.

By contrast, candidates are more likely to speak to student ambassadors and advisors about those elements that specifically shape their educational experience – namely their choice of course and university. Universities must develop strong partnerships with schools and colleges in priority markets in order to adapt and expand their marketing messaging to target a wider group of audiences.

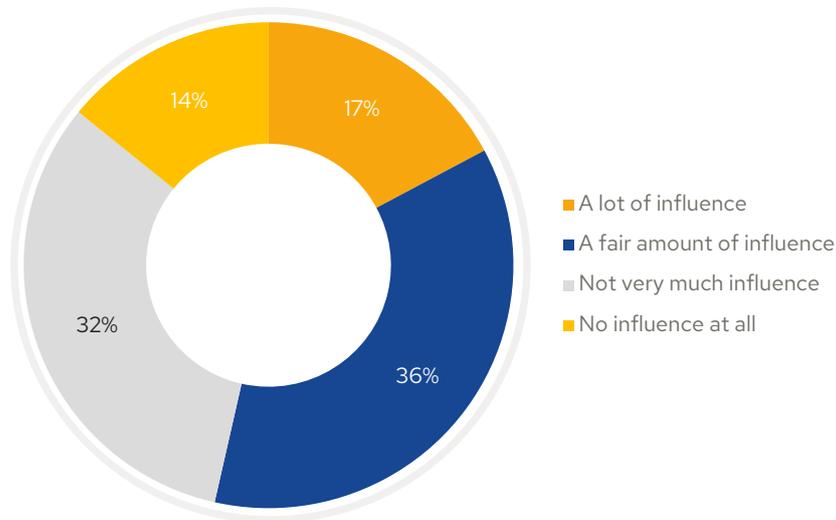
What have you discussed with these people?



Whilst this data proves that parents are involved in the decision-making process for the majority of candidates, it is worth exploring the extent to which this influence is exerted. 53% claim their parents have ‘a lot of’ or ‘a fair amount of’ influence on their decision-making according to our survey.

Due to the cost, distance and unfamiliarity of the destination, parents may consider there to be a greater degree of risk when their child travels abroad to study, compared to their home country. It is crucial that institutions do not neglect this audience in their messaging given that the concerns of parents may differ to those of the candidates themselves. Parents’ influence on a student’s decision-making process does not end at the point of enrolment, as there is also evidence that parents play a significant role in student retention rates.

Overall, how much influence do your parents have about what and where to study?

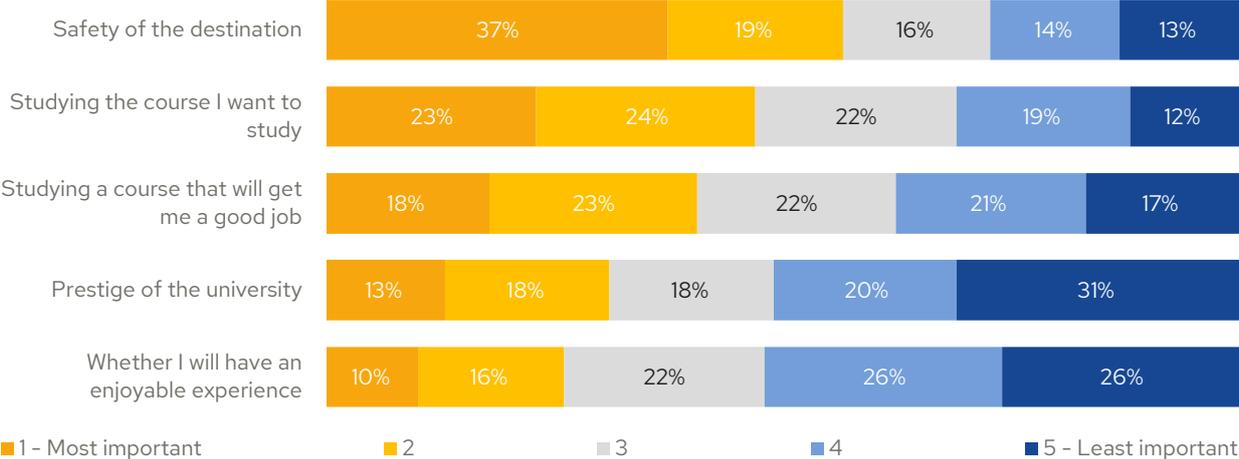


To build on these findings, we also asked candidates what they believed their parents prioritised the most in their discussions. When asked about this, respondents claimed that their parents considered the safety of a destination to be the most important factor of their child's higher education experience. Given that this may be the first instance of true independence for a student, it is vital that universities can reassure both candidate and parent that student safety is a priority, with parents unable to offer the same degree of protection and support, due to the distance between them.



Respondents also claim that their parents are concerned about whether their children will get to study the course they want to and whether their course will lead to meaningful employment. While both of these are considered significantly less important than student safety, it is perhaps unsurprising that parents consider the employability of their child to be of great importance, given the financial security this can provide. To help boost their appeal amongst parents, universities should consider communicating their employability rating and career service offering.

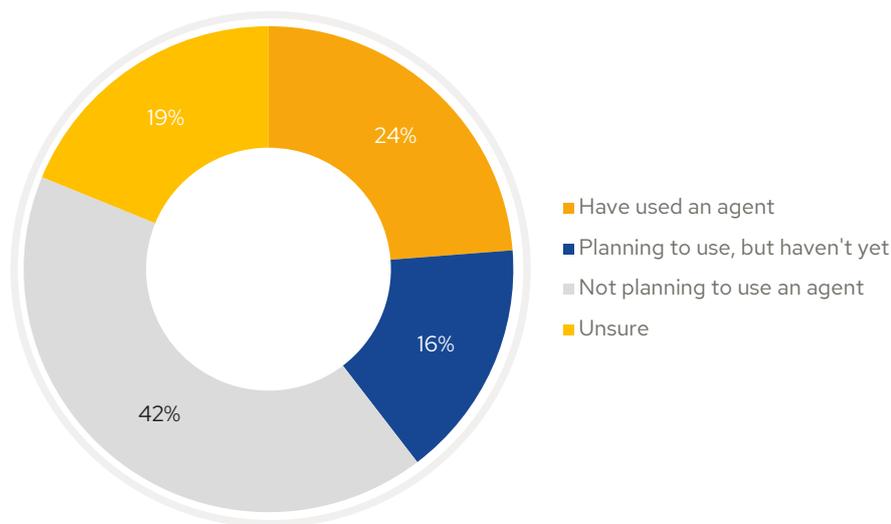
Thinking about your parents, how important do you think they would consider each of the following aspects of your international study to be?



How much do candidates rely on support from agents?

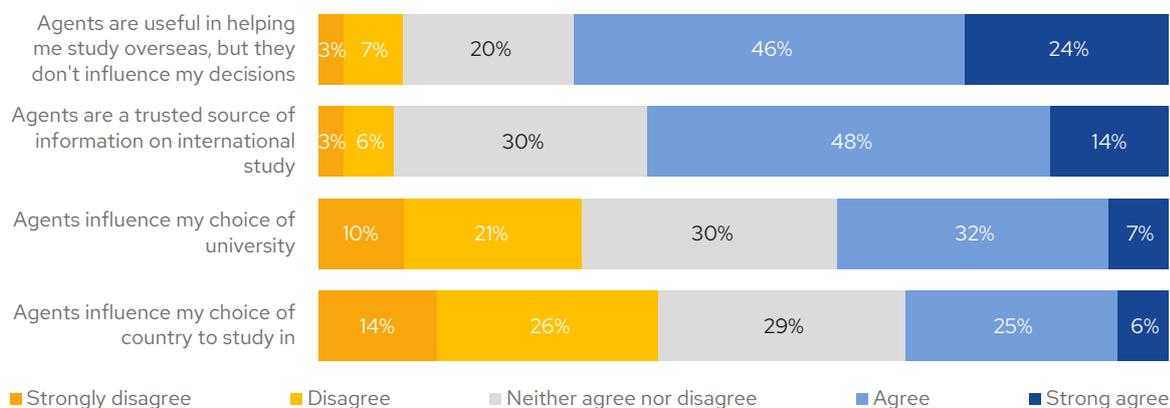
Depending on which region they are from, the extent to which international candidates discuss their study options can vary significantly. 40% of all candidates have either used an agent or are considering the use of one, while 42% have no plans to use an agent at all.

Are you planning to or have you already used the services of an international education agent?



To build on these findings, we also asked those who had either used or were intending to use an agent what their opinion of them was. The results suggest that while agents are predominantly seen as useful and trusted sources of information, they are less likely to influence the final choice of country and university. However, this is not to say that agents have no influence on the process, with 39% of respondents claiming they influence their choice of university and 31% the choice of country.

Agents influence my choices in the following areas – agree or disagree?



Summary:

Our results have shown how critical it is for institutions not to neglect parents from their marketing and communication efforts and to consider the influence they have on student decision-making. Plus, another key audience with the power to influence candidate decision-making is advisors, both at the candidates current place of learning or at the institution they are interested in.



Conclusion

The COVID-19 pandemic highlighted a number of key challenges which the higher education sector must meet in order to build its resilience. Not only have institutions already proven they can adapt effectively, but there are also indications that the sector is well equipped to meet these future challenges as well.

Improving their mental health support for students, incorporating hybrid learning models without leading to a detrimental impact on student health, and communicating

their environmental sustainability impact credentials are all areas which universities should consider investing in.

Universities can leverage some of these benefits to aid their recruitment efforts for the academic year ahead. Through cooperation with multiple stakeholders from across the sector, they can create an environment which is welcoming to international students, one which provides them with multiple options after they graduate.

1 Communicating their environmental impact credentials will become increasingly important for universities. Many candidates agree that universities have a responsibility to take action in this area and could be doing more to be environmentally sustainable, so committing to actionable changes is crucial.

2 As we emerge from the pandemic, it is clear that many candidates prefer a full transition back to face-to-face learning. Moving forward, universities will need to learn from their recent experiences and enhance any online teaching practices to allow greater interactivity between staff and students.

3 There has been a renewed focus on graduate outcomes for international students. Universities must coordinate with other stakeholders to raise the amount of time that international graduates can remain in the country after completing their studies.

4 Parents play a notable role in the decision-making process of a student – particular when it comes to choosing a study destination. US institutions in particular must consider this audience when communicating their offering – addressing any unique questions and concerns that parents may have.



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