Having run for eight years now, the QS International Student Survey has grown consistently to become the world’s largest survey of pre-enrolled international students. The 2020 iteration of the survey was our largest ever, featuring the responses of over 78,578 respondents and 93 institutions from 16 countries around the world. The survey continues to focus on the decision-making process that prospective students undertake, as well as looking at the range of external influences and wider factors that will play a role in their decision making.

This report focuses on the 29,500 responses from those interested in studying in the European Union (EU). With 307 institutions from across the EU featuring in the QS World University Rankings, it remains one of the largest host territories for international students, despite growing competition from other markets. With several nations within the EU engaging in strategies to actively increase the number of international students studying in their country, it is likely that this will become an ever more prominent hub for international higher education. The UK’s departure from the EU may yet present opportunities for this region, as international students flock to areas where they perceive the greatest opportunity. The one caveat to these opportunities is the impact of the coronavirus (COVID-19), which is highly likely to impact international student flows around the world.

The first chapter of this report specifically looks at the impact of the coronavirus in detail. The remainder of the report is informed by a survey that was conducted prior to the coronavirus outbreak and its widespread impact on the global population, universities, and students. At the time of publication, the full impact of the virus on society and the higher education sector specifically is still unfolding. During this time of rapid change, we believe it is more important than ever to listen to the views of students in order to plan for student demand dynamics and inform student recruitment strategies. We believe the insights included in this report shine a light on the underlying drivers and core priority interests of students, which will remain important throughout this time of change.
**Key facts**

- **93 institutions participated**
- **29,500 interested in the EU**
- **193 nationalities/territories represented**
- **Collected 78,578 respondents**

**Report demographics**

- **60% Male**
- **39% Female**
- **1% Other**

- **56% Gen Z**
- **39% Gen Y**
- **5% Gen X**

- **UG**
- **31%**
- **PG**
- **66%**
- **Foundation or Vocational**
- **3%**

- **Business and Management**
- **22%**

- **Engineering**
- **17%**

- **Computing**
- **8%**

- **<$10k**
- **48%**

- **$10k-$25k**
- **24%**

- **$25k-$75k**
- **12%**

- **>$75k**
- **6%**

**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.

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Contents

About the International Student Survey .............................. 2
Introduction from Kym Nguyen ........................................ 5
Recommendations - Underlying drivers and core priority interests for students ........................................ 6

Section 1 Deferred not deterred - The coronavirus and its effects on international higher education ......................... 8
How has COVID-19 changed prospective students' plans for studying overseas? ........................................ 8
What do they expect from universities at this time? .......... 11
How have institutions adopted their strategies to reflect the new status quo? ........................................ 13
How are institutions supporting their current international students? ........................................ 15

Section 2 Student decision making and the opportunities presented by Brexit ........................................ 17
How do prospective international students make decisions? ........................................ 17
What are their biggest priorities when choosing a course, country and university? ........................................ 18
Can countries within the EU benefit from the UK's withdrawal? ........................................ 23

Section 3 Teaching quality and the importance of technology ........................................ 26
To what extent does technology feature in prospective students' definition on teaching quality? ........................................ 26
How do they think technology will change teaching patterns in the future? ........................................ 29
What are the potential unique selling points and barriers to online learning? ........................................ 31

Section 4 Best practices for communicating with international students ........................................ 35
What are the most important topics to talk about when communicating with prospective students? ........................................ 35
What channels and social media platforms do prospective students prefer to use when communicating with universities? ........................................ 38
What does the ideal service look like for prospective students when communicating with universities? ........................................ 41

Section 5 External influences ........................................ 44
Who will prospective students speak to when making study decisions? ........................................ 44
How influential are parents when it comes to student decision making? ........................................ 47
How influential are international education agents when it comes to student decision making? ........................................ 49

Section 6 The importance of graduate outcomes in student decision making ........................................ 52
What are prospective students plans for remaining in the EU after they graduate? ........................................ 52
What do they plan to do after they graduate and how does this relate to the importance of graduate outcomes in their decision making? ........................................ 53
What skills do they expect to leave university with? ........................................ 56

About QS ........................................ 57
Introduction from Kym Nguyen

In last year’s ISS EU report, we highlighted the evolving geopolitical and social fluctuations which were influencing the higher education sector and student flows across Europe. While these remain pertinent today, the COVID-19 pandemic has quickly become the most pressing issue for the European higher education sector, causing significant short-term disruption. During such a dynamic period, we hope that our insights and research will enable European universities to manage future challenges and harness the opportunities that arise in the international student market.

Europe continues to be a top destination and one of the largest host territories for students across the world. With 307 institutions from across the EU featuring in the QS World University Rankings, universities play a huge societal and economic role across Europe. As we look beyond COVID-19, it is clear that Europe’s higher education providers will require sustained support from political and sector stakeholders so that they can continue to thrive.

Our International Student Survey is the world’s largest study of its kind that speaks to prospective international students. This year’s iteration spoke to 78,578 students of 193 different nationalities, of whom more than 29,500 were interested in studying in the EU. This volume of data provides the sector with vital insights into international students’ perceptions and motivations, as well as the shifting dynamics influencing their decision making. We hope that the recommendations for European governments and universities set out in this report, will enable a rapid response to the changes we are seeing in the global higher education market currently.

Our research found that the impacts on student flows from the COVID-19 pandemic are likely to be an issue of timing. Rather than being deterred from studying abroad indefinitely, the majority of international students we spoke to intend to pursue their original intention and defer their entry if it becomes necessary.

The current health crisis has also helped to accelerate the digital transformation of both education and student recruitment solutions. It has forced us to re-think the abilities of online learning platforms and how universities can continue to attract students from across the world, while travel is restricted. As outlined in this report, up-to-date technology is considered a key indicator of teaching quality and a priority factor in prospective students’ decision making. Institutions will need to understand and adapt to these shifts in demand as a result of COVID-19, and we hope this report will help universities make these adjustments.

As well as managing the current health crisis, the EU faces a series of political and economic challenges, not least of which is how to deal with the UK’s departure from the bloc. Our research demonstrates that many European students have been put off from studying in the UK because of the unwelcoming message Brexit sends to the international community, as well as the lack of clarity over Britain’s participation in EU-funded programmes such as Erasmus+. As a result, European universities could stand to gain significantly from such shifts in international student flows and should adapt their recruitment strategies accordingly.

Looking forward, it will be hugely important that international students continue to feel both welcome and inspired to study at universities across Europe. For institutions, it is therefore key that country-specific information on employability and post-study work rights is communicated clearly to priority student markets to make themselves as attractive as possible.

International students in Europe have made an invaluable contribution to the region both socially and economically, and it is vital for the future economic growth of the bloc that they continue to do so. At QS, we trust that our research and insights will help universities respond to the highly dynamic environment by turning the current challenges into opportunities that can be seized. Now is the time to embrace the possibilities of global higher education so that universities across the continent – with all that they have to offer from skills and employment to the latest technology and innovation – can play their full part in the post-COVID-19 recovery.

Kym Nguyen
Director, Global Market Development
Recommendations

Underlying drivers and core priority interests for students

As noted above, this survey was conducted prior to the coronavirus and its widespread impact on the globe. At the time of publication, the full impact of the virus on society and the higher education sector specifically is still unfolding. QS continues to conduct research into the impact of COVID-19 on student recruitment and student demand and we intend to publish further insights on this throughout 2020. For continually updated information, please refer to: https://www.qs.com/covid-19-resources-updates/

During this time of rapid change, we believe it is more important than ever to listen to the views of students in order to plan for student demand dynamics and inform student recruitment strategies. We believe the insights included in this report shine a light on the underlying drivers and core priority interests of students, which will remain important throughout this time of change. Below, we have outlined a few overarching recommendations from the report:

1. COVID-19

International student recruitment strategies and solutions at EU universities should be informed by the changing dynamics in demand as a result of COVID-19.

The outbreak of COVID-19 has fundamentally altered the global higher education landscape in 2020. In the space of a few months, it has had a dramatic impact on international student flows, forced us to rethink the abilities of online learning platforms and had an impact on a range of other elements within the sector. Our findings show that the proportion of prospective international students changing their plans and deferring their entry until next year has risen exponentially between February and March 2020. Furthermore, most prospective students expect universities to respond in kind by switching their lectures to an online forum whenever it is appropriate to do so. Many universities have acknowledged the need to switch to providing courses online and have acted accordingly in significant numbers. With restrictions on travel and social distancing measures likely to stay in place for the foreseeable future, it is vital that EU universities’ international student recruitment strategies are informed by these dynamics.
2. Brexit and its implications

International student recruitment strategies and solutions at EU universities should be informed by the changing political dynamics as a result of the UK’s departure from the European Union.

Given the potential for fundamental shifts within the higher education sector at this time, it is vital that universities continue to gauge how prospective students come to the decisions they have made, in order to meet the global education export challenge. Findings from this report show that prospective students will first decide on the course they want to study, before thinking about the country they want to study in and finally the university they plan to study at. Teaching quality, a welcoming location, future career considerations and affordable living costs are all important factors in the decision-making process that universities should consider. Furthermore, our research shows that a significant number of prospective students have been put off from studying in the UK, owing to the unwelcoming message Brexit sends to the international community. Universities in EU countries therefore have the potential to benefit significantly from shifting international student flows as a result and should inform their recruitment strategies accordingly.

3. Post-study work rights

Communicating clearly graduate employability and post-study work rights could significantly increase the likelihood of prospective students studying at European universities and help to stimulate future economic growth.

Post-study work rights and graduate employment outcomes in different countries have been the subject of much debate around the world. The length of time that graduates can remain in the country they study in varies considerably. Many countries have endeavoured to increase the amount of time that international students can remain, in a bid to make themselves as attractive as possible to this audience.

Our findings show that most international students would only look to remain in the country after they graduate for as long as their post-study work visa allows. Meanwhile, over half of all prospective students would like to enter the world of work after they graduate with many wanting to go into jobs at multinational organisations or into government sector roles. They also cited the graduate employment rate and the speed with which graduates can find work as two of the most important factors when considering their study options. For EU universities, it is therefore key that information on employability and post-study work rights is communicated clearly to prospective students to help stimulate future economic growth in their respective countries.
Section 1
Deferred not deterred - The coronavirus and its effects on international higher education

Key findings

- The proportion of prospective international students who have had to change their plans to study abroad has more than doubled in the space of six weeks
- Most of those affected now would like to defer their entry until 2021, but only a minority have cancelled their plans altogether
- Institutions worldwide have acted in significant numbers to switch the provision of as many courses as they can to an online setting
- Universities are also maintaining a regular dialogue with their current international students with updates and information to give as much reassurance as they can

How has COVID-19 changed prospective students’ plans for studying overseas?

The global higher education sector has undergone a fundamental shift following the outbreak of the coronavirus (otherwise known as COVID-19) in 2020. The abilities of online learning have been re-thought, international student flows have dramatically shifted and a range of other elements within the sector have all seen a realignment.

The 2020 QS International Student Survey was conceived and data was collected prior to the coronavirus outbreak and its widespread impact on the sector worldwide. At the time of publication, the full impact of the virus on the higher education sector and society in general is yet to be fully realised. In response to this crisis, QS has set up two additional, ongoing surveys, to establish the views of higher education institutions and prospective international students around the world. These surveys will run continually to enable QS to provide a series of updates on the impact of COVID-19 on student demands and student recruitment.

Our student-facing survey targets the same audience as our International Student Survey, namely prospective international students. Since this survey launched in mid-February, we have collected responses from 6,242 prospective international students who are interested in studying in the EU to establish how the crisis might impact international student flows in the future. We can also profile how these views have shifted over time as the crisis has unfolded and continues to unfold.
The accompanying survey which targets higher education professionals working at universities worldwide has also received more than 650 responses. In this section, we explore these findings, looking at the impact on campus management, online learning offers, and student recruitment in later sections.

To plan ahead for shifting student demand dynamics and to inform differing student recruitment strategies, it is more important than ever to listen to the views of students in this time of rapid change. The core priority interests of students and the underlying drivers of these will be covered in the insights from this report as both will remain an important factor throughout. These drivers will also be followed by a series of steps and measures that universities can take to best respond to these insights.

From travel restrictions to social distancing, isolation measures, quarantines, and campus and border closures, students across the globe have been impacted by the spread of COVID-19 in a variety of ways. In mid-February when we set up this survey, only 27% claimed that their plans to study overseas had been impacted by the coronavirus. However, throughout March as the crisis spread to more and more countries, greater numbers of prospective students felt that their plans had to change. Within six weeks, more than double the number of respondents claimed that their plans to study abroad had been affected in some way and at the start of April this peaked, with 62% claiming that their plans had changed. The point at which this trend considerably shifted was mid-March where significantly greater numbers of prospective students felt they had been affected. It is at this point when the number of global fatalities and cases began to increase exponentially and when a high number of countries imposed travel restrictions and isolation measures in an attempt to limit the spread of the virus. It therefore makes sense that the period from 6th to 19th March coincided with the biggest increase in those changing their plans. This is when a general sense of uncertainty started to increase among students, as did their unease with their plans to study overseas.

Has the coronavirus affected your plans to study abroad?
As a follow up to this question, we also asked those who had changed their plans how they felt they had been affected. This is the best way to consider how the crisis might impact future international student flows and what the implications might be for universities. Similarly to the above, we can also profile how the responses of prospective students change over time, to see how it impacts future plans.

Initially, we asked respondents how their plans had been affected in their own words. The responses here suggest that a variety of factors were having an impact on their decision making which had only recently come into play. Travel restrictions (either in their home country or the country they intended to study in), complications or delays with their entrance exams or pre-conditional requirements, or simply the university closing all came through as elements which had been affected as a result of the crisis.

“I wanted to do the SAT exam but it got cancelled so I don’t know exactly how I'm going to postulate for universities outside my country (Chile).”

“As A-level exams has been postponed, I have to go for a November intake and will receive my results in January of 2021 instead of August 2020, if everything would have been as planned.”

“I had my IELTS scheduled for the end of March and due to lockdown it got cancelled and now I don’t know when the test will be happening again and the deadlines are approaching as scheduled.”

It is clear from these comments that many prospective students have various fears and concerns. Universities need to work quickly to answer the most pressing concerns, particularly around flexibility with application deadlines and entrance requirements if they are to alleviate these concerns.

We also prompted prospective students with a list of options to provide a more definitive guide to how their plans had been affected, and these responses have varied significantly over time. When the survey began in mid-February, the most popular response was to attempt to study in a different country from where they had initially planned, with 42% selecting this option. However, by mid-March, this situation had dramatically shifted, and plans were being altered in fundamentally different ways.

By the beginning of April, the most popular option was simply to defer their studies until a later date. This was because as the number of affected countries continued to rise and it became a truly global issue, there were fewer and fewer perceived ‘safe’ countries. As a result, there was a dramatic decline in those looking to study overseas in a different country and a subsequent increase in those looking to defer their entry until the following year. Furthermore, it is interesting to note that the proportion of those who are no longer looking to study overseas has remained relatively low throughout. This suggests that whilst the impact of the crisis in the short term may be significant, the market for international students is no smaller now than before the crisis and that in future years, the demand for places for international students is likely to be larger than ever before.
Which of these best describes how the coronavirus has changed your plans to study abroad?

![Chart showing percentages of respondents for different time periods and options:]

- **I now intend to defer my entry until next year**: 7%, 10%, 13%, 42%, 28%
- **I now intend to study in a different country**: 4%, 6%, 33%, 16%, 60%
- **I now no longer want to study overseas**: 11%, 11%, 33%, 60%, 55%
- **Other - please specify (click to view)**: 18%, 14%, 11%, 6%, 19%
- **None of these**: 13%, 4%, 2%, 6%, 12%

![Timeline chart showing dates:]

- **14/02/20 - 20/02/20**: 53%, 32%
- **20/02/20 - 05/03/20**: 33%, 33%
- **06/03/20 - 12/03/20**: 60%
- **13/03/20 - 19/03/20**: 45%
- **20/03/20 - 02/04/20**: 55%

**What do they expect from universities at this time?**

As a result of the crisis, it is clear significant numbers of prospective students have had their plans derailed. The question remains however, how can universities support their current and prospective students in a bid to try to alleviate some of the worst of the impact of the crisis?

We asked respondents how interested they would be in learning part or all of their degree online as a way of establishing the potential for online learning to replace traditional classroom techniques. Nearly 60% of prospective students expressed some form of interest in studying their degree online and the fact that so many are at least open to the idea of learning via this method suggests there is significant market potential here. This is a potentially encouraging sign for universities and suggests that there is the possibility that it could help to minimise the worst of the impact of the crisis for institutions. However, it is worth noting that a significant proportion of roughly 40% of respondents are definitive in their rejection of online learning and that this group are the most likely to want to defer their studies overseas until a later date. It should come as no surprise that such a significant proportion remain uninterested in online learning, as we know from previous years when running this survey, international students see the main benefits of studying overseas to be the opportunity to experience different teaching methods, environments, and cultures. However, online learning remains the best approach for universities to continue to operate and to minimise the impact of the crisis on student recruitment. The responses to this question will continue to be monitored over time to see if the level of openness to online learning begins to increase amongst this audience.
How interested would you be in studying your degree online because of the coronavirus?

To help put these results in context, QS recently conducted a series of interviews amongst currently enrolled Italian university students to understand their perspective of online learning under quarantine to see how widely accepted this notion is.

Sveva, a third-year languages student at the University of Turin, says the university was quick to impose strict measures, including suspending classes and closing libraries:

“*I think [university staff] are doing the best they can. PowerPoints, course summaries, pre-recorded lectures are all very effective ways to help.*

“In my case, because I study languages, I was given different translations to do at home, and now instead of turning them in in class, I send them to my lecturers via email and they send them back to me graded. It’s a very efficient system.”

We also asked prospective international students what they thought universities should be doing to help minimise the overall impact of the coronavirus as a follow up to the above question. The most popular answer was to move more of their lectures online, with 65% of respondents selecting this. This suggests that for universities to continue to support their current student populations, online learning offers the most direct course of action for them to be able to do this. The necessity of adapting to the new status quo during the crisis could lead to 2020 being the year when online learning becomes an accepted form of education for great numbers. In the short term however, it is vital that universities are seen to act to protect and support their student populations. As we highlight in later sections of the report, safety is one of the most important priorities for prospective students and their parents. Universities which act now will see the benefit in the long term as they will be able to demonstrate their commitment to student safety at a time when it is most needed.
Which of the following do you think universities should be doing to limit the impact of the coronavirus?

- Moving more of their lectures online: 65%
- Ensuring that hand gel is widely available on campus: 54%
- Ensuring access to dedicated health professionals for students: 53%
- Establishing a 24-hour helpline for students: 51%
- Holding lectures and seminars in larger rooms to minimise close contact in larger gatherings: 34%

How have institutions adapted their strategies to reflect the new status quo?

As mentioned before, QS also wanted to gauge the views of higher education institutions and establish how many of them have had to adopt different strategies to cope with the crisis. The combination of views from students and institutions will help to provide a comprehensive overview of the impact of the coronavirus on the global higher education sector. In tracking the views of staff at universities from all over the world, we have been able to document how it has been necessary for them to switch large parts of their programmes to digital platforms and online learning while they close their physical campuses in a short space of time. By drawing attention to these trends, QS hopes to be able to support institutions across the globe who may be struggling in these uncertain times.

In navigating their way through this crisis, the largest challenges for institutions are to protect staff and students and provide clear communications to both audiences, not to mention maintaining consistent course delivery and ensure that student recruitment is as unaffected as possible. Many of these challenges are unprecedented and when asked to articulate how these had impacted the day-to-day running of institutions, a number of factors were mentioned. Keeping their own staff and student populations healthy, how to effectively move their course content online and concerns around future enrolments were all mentioned by various institutions:

“Our biggest challenge was how to move from traditional education to e-learning and how to overcome the problem of practical courses and training.”

“The impact on student numbers has been significant, which means that there's pressure to reallocate funding to address shortages that have arisen. There are also communication and distance study options issues that are creating ongoing problems as we iron out the details of who needs what information or which resources.”

“Our biggest challenges are keeping students and staff safe and well; avoiding panic; maintaining educational progress with innovative educational solutions, like going online; the financial hit of fewer students and expenditures on coronavirus-related necessities; and keeping our international students coming.”
We have already seen that students believe one of the most effective tools that universities can use to respond to the crisis is to move their degree courses to an online setting, where appropriate. It appears that this expectation has been delivered by universities, who have responded quickly. When asked which methods they had adopted to respond to the crisis, the most widely selected option was to switch some of their scheduled courses online, with more than half of institutions selecting this option. It is clear that for them to continue with their course delivery, this is the most effective and easily achieved short-term strategy. It is interesting that when it comes to delaying application and enrolment deadlines, only a minority of institutions had adopted this strategy. It seems that universities are reluctant to alter anything related to future intakes until they have more concrete information as to when this crisis might abate.

Has your institution responded to the coronavirus in any of the following ways?

- Switched some of our scheduled courses online: 57%
- Changed our application deadlines for our next intake: 19%
- Delayed the start dates for some of our courses until the following semester: 19%
- Changed our offer acceptance deadlines for our next intake: 18%
- Deferred some of our 2020 offers to 2021: 14%
- Started conducting our own English language tests: 7%

The revenue which international students bring to many universities is much needed. With the closure of international borders and the imposition of travel restrictions, many are coming to terms with the fact that in the next academic year, the revenue which they bring may be significantly reduced. When asked how they thought the crisis might impact the number of student applications they received at their institution, around half thought that it would have a detrimental impact. These attitudes also had a subsequent impact on their priorities for future student recruitment strategies.

When asked how the coronavirus had impacted their student recruitment activities, the responses from institutions showed a clear pattern. Far greater importance is now being assigned to digital marketing and digital events. The attention being paid towards an institution’s online capabilities is far more prominent now as the coronavirus forces students and staff to meet and communicate through digital means. Whilst it is encouraging to see a unified approach amongst staff and students, with both recognising the heightened importance at this time, it is important to bear in mind what the implications are for this in the future. In order to adequately support their student populations, universities need to act with a rational outlook and with care, to ensure the actions taken now are the correct ones.
Are these student recruitment activities more or less important to your institution because of the coronavirus?

<table>
<thead>
<tr>
<th>Activity</th>
<th>More important</th>
<th>Not applicable</th>
<th>Less important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital events</td>
<td>79%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>Digital marketing</td>
<td>76%</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td>Qualified one-to-one online meetings</td>
<td>73%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Lead generation</td>
<td>54%</td>
<td>30%</td>
<td>16%</td>
</tr>
<tr>
<td>Qualified one-to-one, in-person meetings</td>
<td>27%</td>
<td>29%</td>
<td>45%</td>
</tr>
<tr>
<td>In-person events/fairs</td>
<td>18%</td>
<td>23%</td>
<td>59%</td>
</tr>
</tbody>
</table>

How are institutions supporting their current international students?

Within the higher education sector, international students are one of the most widely affected audiences and in order to adapt to a very different landscape, international offices across the world are having to shift their operations. According to our analysis, 52% of institutions claimed that student mobilities were receiving more attention as a result of the coronavirus.

As part of our survey, we asked institutions how often they were in contact with their international students with news or updates related to the coronavirus and what that meant for them. The results demonstrate that as they seek to provide reassurance for their international students, institutions are attempting to maintain a constant dialogue with them. The support they are able to offer now is likely to resonate in the long term and is an encouraging sign for the sector.

Whilst it seems that the majority of institutions are frequently reaching out to their international students with coronavirus-related updates, some are missing out on the opportunity to inform and reassure this audience. It is vital that the information imparted now is done so via the most appropriate platforms. The majority of institutions are using email to communicate these updates (87%), whilst almost half (44%) were using social media (though it is important to recognise that the social media platforms will vary significantly across different markets). A significant minority were using phone calls as well (24%).
How frequently are you in contact with your current international students with updates about the coronavirus?

- 36% Daily or more
- 17% A few times a week
- 6% Once per week
- 6% Fortnightly or less
- 14% We are not contacting our students specifically about coronavirus
- 22% Don’t know

In these uncertain times, it is more important than ever that institutions around the world strive to deliver consistent communication and high quality teaching to their students. If they are to achieve this, it is vital that they leverage the latest technological tools at their disposal and listen to students’ concerns at this time. Our ongoing surveys and research aims to support institutions by providing them with up-to-date insights on how both students and universities are responding to the crisis. By partnering with institutions during this crisis, QS hopes to help them adapt to this new normal in the months to come.
Section 2

Student decision making and the opportunities presented by Brexit

Key findings

- Prospective students will first decide on the course they want to study, before thinking about the country they want to study in and finally the university they plan to study at.
- Teaching quality, a welcoming location, future career considerations and affordable living costs are all important factors in the decision-making process.
- A significant number of prospective students are put off from studying in the UK, owing to the unwelcoming message Brexit sends to the international community.
- EU countries have the potential to benefit significantly from shifting international student flows as a result of Brexit.

How do prospective international students make decisions?

As we highlighted in the introduction, one of the core topics we focus on within the survey every year is the process of decision making for international students. This concerns not just the order in which they make those decisions, but also looking at what factors are important to them at each stage of the funnel and examining the variety of external influences which will also have an effect on their decision making.

Given the potential for fundamental shifts within the higher education sector at this time, it is vital that we continue to gauge how prospective students come to the decisions they have made, in order to meet the global education export challenge. In this section, we will analyse how advanced prospective students are when it comes to making a final decision on a range of aspects relating to their studies to establish the order in which they make those decisions. We look at the factors which are most important to them throughout this process and evaluate how Britain’s departure from the EU has the potential to alter their decision making to provide a comprehensive aid to international student recruitment strategies.

In this section we ask respondents how advanced they are in deciding on a range of different aspects with regards to their studies. The chart below gives an indication as to the order in which the majority of prospective international students make decisions. It suggests that for the most part, students will initially decide on their chosen subject or course with just under half of all prospective students having already decided on these elements. Whilst it is true that for many of this audience, their chosen subject and chosen course are identical and the decisions are made at the same time, it is worth bearing in mind that for a minority, they see the course as a separate stage of the decision-making process.
Later in the report, we look at what their individual priorities are when they come to choose a country as well as looking at the implications of Brexit on this particular stage. The final part of the decision-making process concerns the university they would want to study at and the town they would like to live in, with only around a quarter of prospective students having made a final decision on these elements. Again, for many these two decisions are made at the same time, since the first automatically pre-determines the second, however it is still worth bearing in mind that for a minority, this represents a separate stage of the decision-making process and that a separate set of priorities come into play when choosing what area they want to live in. The ability of universities to influence this particular area is slightly more limited, however it is important for them to be aware of this as a separate stage in student decision making and to communicate to prospective students where they can be of assistance.

For each of the following, please choose the option that best describes your stage in the decision-making process:

- Choosing the town/city I would like to live in
  - Not yet considering: 14%
  - Considering lots of options: 22%
  - Considering a few options: 41%
  - Decided on preferred option: 23%

- Choosing the university I want to attend
  - Not yet considering: 9%
  - Considering lots of options: 24%
  - Considering a few options: 42%
  - Decided on preferred option: 25%

- Choosing the country I want to study in
  - Not yet considering: 4%
  - Considering lots of options: 18%
  - Considering a few options: 45%
  - Decided on preferred option: 33%

- Choosing the course I want to study
  - Not yet considering: 3%
  - Considering lots of options: 14%
  - Considering a few options: 36%
  - Decided on preferred option: 47%

- Choosing the subject I want to study
  - Not yet considering: 3%
  - Considering lots of options: 15%
  - Considering a few options: 32%
  - Decided on preferred option: 49%

What are their biggest priorities when choosing a course, country and university?

Now that we have established the order in which prospective students make their decisions, the next step is to take each stage of the decision-making funnel and analyse what their most important priorities are. For each stage in the process, we present respondents with a list of priorities and factors which may be influential in their decision making and ask them to select their top five most important aspects. As a follow up, we also ask them to rank these factors based on their order of importance. The combination of the two allows us to gather a huge amount of detail on the relative level of importance attributed to each aspect.
As we have highlighted, one of the first things prospective students will decide on is their preferred course. When asked what their most important priorities were at this stage of the process, the most important factor to emerge was that the course leads to their chosen career. This implies that prospective international students start thinking about their future careers and life after they have graduated before they have even commenced their studies, at the very beginning of their application process. We look at what their specific plans are after they have graduated in later sections, where we analyse what skills they would like to receive from studying at university and what they deem to be of most importance when thinking about graduate outcomes. However, it is crucial to note the importance of future careers in the content that universities use to communicate with prospective students.

Another important element is that they have a personal interest in the subject. While this may be unsurprising, it is an important factor which drives their decision making. We also know from previous years of the survey, that students expect their interest and passion for the subject matter to be reciprocated by their teachers and lecturers. It is clear that students have certain expectations for their personal interest in the subject to be nurtured and to evolve during their time at university.

What five things are most important to you when choosing a course?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>It leads to my chosen career</td>
<td>59%</td>
</tr>
<tr>
<td>I have a personal interest in the subject</td>
<td>57%</td>
</tr>
<tr>
<td>It has affordable tuition fee options</td>
<td>50%</td>
</tr>
<tr>
<td>The course offers high quality teaching</td>
<td>49%</td>
</tr>
<tr>
<td>It’s at a university with a good reputation</td>
<td>48%</td>
</tr>
<tr>
<td>It has a high graduate employment rate</td>
<td>38%</td>
</tr>
<tr>
<td>The course is well structured</td>
<td>33%</td>
</tr>
<tr>
<td>It includes a work placement</td>
<td>31%</td>
</tr>
<tr>
<td>I can easily meet the entry requirements</td>
<td>27%</td>
</tr>
<tr>
<td>It is well-ranked</td>
<td>27%</td>
</tr>
<tr>
<td>I will be studying with like-minded people</td>
<td>23%</td>
</tr>
<tr>
<td>It has good student satisfaction ratings</td>
<td>20%</td>
</tr>
<tr>
<td>Opportunity to study abroad for a semester</td>
<td>18%</td>
</tr>
<tr>
<td>It has flexible hours and delivery</td>
<td>12%</td>
</tr>
<tr>
<td>It was recommended to me</td>
<td>7%</td>
</tr>
</tbody>
</table>

The next stage of the decision-making funnel concerns the importance of various factors when choosing a country to study in. Here, the most important element which prospective students think about is how welcoming that country is towards international students. This is an encouraging sign for many EU countries such as Germany and France, both of which have taken active steps to recruit more international students and to promote themselves as a supportive and nurturing environment for this audience. It is also worth mentioning the UK’s departure from the EU, as it is a topic we have covered in previous iterations of the International Student Survey. A recurring theme to emerge was that one of the negative implications, as far as prospective international students are concerned, was that Brexit made...
the UK appear unwelcoming and hostile. This applied not only to those prospects from within the EU but also from the rest of the world. Therefore, the importance of a ‘welcoming’ environment for international students cannot be overlooked by EU institutions, as they look to promote themselves as being open and inviting towards this audience.

Another important aspect to emerge was the quality of teaching at universities within that country. With several countries within the EU able to boast numerous institutions which have not just performed well in global rankings, but demonstrated consistent improvement year on year, this has yet more positive implications for the sector across the EU. Institutions should endeavour to promote the quality of teaching they can offer to prospective students, as the content and messaging surrounding this is likely to resonate with this audience. The final element to mention is the importance of affordability, not just in terms of studying, but also from a living cost perspective. It is clear that value for money considerations dominate the mindsets of many prospective students. Fortunately, many countries across the EU can offer a relatively low cost of living and more affordable tuition fees (compared to other markets which host large numbers of international students, such as the UK and North America). It is important for EU institutions to leverage this unique selling point as the cost of tuition fees, relative to the quality of teaching, is one of the best in the world.

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

- It is welcoming to international students: 56%
- It has universities with high quality teaching: 50%
- It has an affordable cost of living: 48%
- It has an affordable cost of studying: 48%
- I can get a visa to work after graduating: 40%
- It has a good reputation as a place to study: 38%
- It has good graduate employment options: 37%
- The culture/lifestyle appeals to me: 36%
- I can get a visa to study there: 35%
- It will help me build a network of connections: 34%
- I can improve my language skills: 31%
- It has well-ranked universities: 29%
- I have friends or family living there: 6%
- It was recommended to me: 6%
- It’s near to my home country/country of residence: 5%
- I already live there: 2%
The final part of the decision-making process concerns the importance of various factors when choosing a university. The most important priority to emerge was that the university offers scholarships. Given what we have seen before about the relatively high importance of affordable study costs, it is unsurprising to see this emerge as such a prominent factor. However, it does suggest that universities need to pay close attention to the types of scholarships that they offer to international students. Our research has shown that the importance and availability of scholarships is more prominent a factor at the start of the decision-making process for many prospective students. As they progress through the application cycle and get closer to the time when they enrol at a university, the importance of scholarships tends to wane (largely because their funding options are more fixed by the time they reach this particular stage). If universities are to speak about their additional funding support for international students, it is best to communicate these at the beginning of the enquiry process as this is when the content tends to resonate most.

Another important factor to emerge includes how welcoming the institution is to international students. We have illustrated how important this is when it comes to choosing a country, so it is not surprising to see this emerge here as well. It is vital that universities can demonstrate their support for international students in a credible manner to effectively nurture them through the enquiry and application process. Our research has consistently shown that concerns around student safety and being made to feel unwelcome are some of the most prominent worries for prospective students. It is clear that any university which is able to demonstrate how welcoming they are to international students and their commitment to providing a nurturing and supportive atmosphere is likely to benefit hugely from this effort. Finally, it is important to note the importance of teaching quality again. This demonstrates that it is a consistent consideration for prospective students which they think about continuously throughout the application process. Being able to prove teaching quality credentials is a vital factor for universities when communicating with their prospective international students.
What five things are most important to you when choosing a university?

- It offers scholarships: 62%
- It is welcoming to international students: 53%
- It offers high quality teaching: 53%
- It offers a specific course I am interested in: 45%
- It has a good reputation for my chosen subject area: 41%
- It has a good careers service and links with employers: 36%
- It has a high graduate employment rate: 33%
- It offers a more affordable course in my chosen subject area (compared to other institutions): 30%
- The overall reputation of the institution: 29%
- It is well-ranked: 27%
- It has affordable university-owned accommodation: 27%
- I will be able to make friends with people from different countries: 20%
- It is in my preferred town/city/country: 16%
- It responds quickly to my enquiries: 13%
- It has well known or famous alumni: 6%
- It was recommended to me: 6%
- I have friends or family who have been to that university: 3%
Can countries within the EU benefit from the UK’s withdrawal?

After years of debate and wrangling, the UK officially left the EU on January 31, 2020. Whilst this marked a significant point in the geopolitical landscape across the region, months of negotiation lie ahead and its effect on the higher education sector in the UK and the EU is still far from being fully realised. It is vital that we continue to assess the attitudes of prospective international students to understand its potential impact on student recruitment. Sentiment amongst this audience is carefully tuned to the state of negotiations between the UK and the EU, so as developments continue to unfold, new dynamics will emerge and attitudes will shift. It is important to analyse how this shifting landscape is impacting students’ decision making and whether this reveals any potential opportunities for institutions across the EU.

We asked prospective international students who were interested in studying in the UK, whether Brexit had impacted their decision making. The vast majority claimed to have been unmoved in their decisions by Brexit, with 65% claiming it had made no difference to their considerations. The remainder were relatively evenly split, with 16% claiming to be more likely to consider the UK and 11% claiming to be less likely. The likely reason for so many claiming that Brexit had not had an impact is because much of the negotiations are still taking place, especially those regarding the future of international students in the UK. It is likely that as negotiations continue and the future arrangements become clearer, these proportions will change.

However, it is important to note that the negative implications of Brexit are significantly more prominent amongst prospective students from within the EU than outside of it. In previous iterations of the survey, we have highlighted that more than a third of prospective EU students were put off from studying in the UK as a result of Brexit. Given that many institutions in the EU will recruit large numbers of students from other EU countries, this suggests that there is an opportunity for EU institutions, as they can benefit from greater numbers of prospective students who will look to remain within the EU for their studies. Given that there are tens of thousands of EU students studying in the UK, this represents a huge opportunity for EU institutions as they look to capitalise on changing international student flows.

Much of this will depend on how much EU students will have to pay to study in the UK going forward. If the level of tuition fees is set as highly as it currently is for international students, then this represents a significant increase for EU students in the UK. The last time such an increase was introduced (2012), it led to a 13% decline in the numbers going from mainland Europe to the UK to study. Whilst numbers have since recovered, the levels they might have to pay going forward could result in opportunities for EU institutions, as long as they are able to promote themselves in an appropriate manner and to have the right strategies in place to manage international enquirers.
Has the UK's decision to leave the European Union affected your interest in studying in the UK?

- 65%: I was never interested in studying in the UK
- 15%: It has made me more interested in studying in the UK
- 11%: It has made me less interested in studying in the UK
- 7%: It has made no difference to how interested I am in studying in the UK
- 2%: Don't know

As a follow up, we asked those who were less likely to study in the UK as a result of Brexit if the process had made them more likely to consider studying in other countries. The results show that a number of regions and territories have the potential to benefit from greater numbers of international students going forward. Over 90% of those who have reservations about studying in the UK because of Brexit have considered at least one other country they might want to study in, while on average they will consider between two and three additional markets.

It is clear that there are opportunities for EU institutions. Whilst North America seems likely to become the biggest beneficiary of changing student flows as a result of Brexit, many EU countries stand to gain here. Germany, Netherlands and France could be the best placed markets to benefit, with over a fifth of those looking to study elsewhere considering each of these countries. In total, 62% of those looking to study elsewhere selected at least one market within the EU. This goes some way towards suggesting the scale of opportunity here for EU institutions as they seek to capitalise on the changing dynamics.
Has Brexit made you more likely to consider studying in any of the following countries/regions?

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Canada</td>
<td>32%</td>
</tr>
<tr>
<td>United States</td>
<td>29%</td>
</tr>
<tr>
<td>Germany</td>
<td>25%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>21%</td>
</tr>
<tr>
<td>France</td>
<td>21%</td>
</tr>
<tr>
<td>Australia</td>
<td>20%</td>
</tr>
<tr>
<td>Sweden</td>
<td>13%</td>
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<tr>
<td>Italy</td>
<td>12%</td>
</tr>
<tr>
<td>Denmark</td>
<td>12%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>11%</td>
</tr>
<tr>
<td>Spain</td>
<td>10%</td>
</tr>
<tr>
<td>Japan</td>
<td>7%</td>
</tr>
<tr>
<td>Austria</td>
<td>6%</td>
</tr>
<tr>
<td>Singapore</td>
<td>5%</td>
</tr>
<tr>
<td>South Korea</td>
<td>4%</td>
</tr>
<tr>
<td>Russia</td>
<td>4%</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>3%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>3%</td>
</tr>
</tbody>
</table>

International student decision making is a multi-layered process which takes into account numerous factors and dynamics. Not only are there long-standing themes and priorities, but the decisions which prospective students make are influenced by a variety of shifting factors. The changing geopolitical landscape could present new opportunities for universities within the EU, as long as they have implemented the correct processes and strategies to effectively manage enquirers and applicants throughout the decision-making process. It is vital that they are allowed to operate with the freedom to take advantage of these opportunities if the EU is to consolidate itself as a global hub for international students.
Section 3
Teaching quality and the importance of technology

Key findings

✦ When assessing teaching quality at any given institution, up-to-date technology is one of the principal components used by prospective students in their decision making.

✦ The definition of up-to-date technology varies significantly depending on subject interest and can extend to facilities in laboratories through to the availability of online journals.

✦ A more personalised, interactive teaching method is the principal way that prospective students see technology as helping them to learn in the future.

✦ More students than ever before are interested in online learning, drawn by the flexibility and option to work while studying that an online course offers.

To what extent does technology feature in prospective students’ definition on teaching quality?

The international higher education sector is undergoing a period of rapid change, which means the manner of teaching and the way in which students are taught is likely to undergo a subsequent shift. As new technologies become more commonplace, universities will have to find ways to optimise these fully to enable the best possible experience for students and students will need to establish the optimum way for these new technologies to help the way they learn. This section seeks to provide guidance for universities on some of these fundamental issues and start the discussion on the best ways to bring new technologies into a classroom setting, as well as establishing the potential for online degrees in the years to come.

At the time of publication, we have begun to see the reliance on online learning as a result of the outbreak of COVID-19, as universities come up with new ways to overcome the barriers of in-situ learning. We predict that 2020 will undoubtedly be the year in which more students than ever before will use online learning as a primary method of studying for a degree. This may yet provide the template for what an online degree could look like in the future and how these courses could work at a larger scale, where its benefits to students are realised. This year could be the year when online learning comes of age and its true potential is discovered.

As a starting point, it can be useful to evaluate the link between the perceptions of new technologies and how these relate to definitions of teaching quality. We have already seen that teaching quality is a consistently important consideration for prospective students when they come to make decisions about their studies and is a topic they will think about...
continually throughout the application process. The next step is to evaluate how these prospects define ‘good quality’ teaching so that we can then look at how universities demonstrate their credentials in this vitally important area.

It is important to note that the definition of teaching quality is heavily dependent on what subject the student in question is looking to study. Different factors will come to the fore for different student cohorts, meaning there is no single definition. However, it is possible to establish some core themes and look at the role of technology and how its importance varies across different subject areas. When asked to define what factors are most important to them when assessing a university’s teaching quality, up-to-date technology was the most important factor, ahead of the university’s teaching staff. Given the importance of teaching quality in student decision making, this suggests that up to date technology plays a key role in this process as it is one of the main indicators of the quality of teaching. Not only is it more important than the prominence of a university’s teaching staff, but it is also more important than any ratings in country-wide measurement schemes or rankings of universities.

Which five factors are most important to you when assessing a university’s teaching quality?

- Up-to-date technology: 65%
- The university’s teaching staff: 64%
- The university has received recognition of its teaching quality via a country-wide measurement scheme: 58%
- A high graduate employment rate: 54%
- The university is ranked well overall in independent ratings: 52%
- The university organises work placements as part of its courses: 52%
- High volume of face-to-face teaching hours: 50%
- The university responds quickly to my enquiries/emails: 36%
- High graduate starting salaries: 30%
- Good online learning options: 24%

An important consideration here is that the importance of technology as an indicator of teaching quality is driven by certain subjects. These tend to be in STEM fields where equipment and laboratory study dominates the teaching and learning process. The full list of subject areas where up to date technology is the most important indicator is below:

- Agriculture, Food and related studies
- Architecture, Building and Planning
- Business and Management
- Communications and Media
When asked to define what up-to-date technology meant to them, the answers from students looking to study these subjects varied significantly. For those looking to study Engineering or Computing, their definitions focused on the use of technology within laboratories and the study facilities available to an institution within workshops. These definitions relate more closely to the true use of up-to-date technology when thinking about the future direction of incorporating high-tech equipment into the classroom:

“Provision of computers for adequate research. Having well-equipped and updated equipment in the laboratory for practicals.”

“As a full-time research student that mainly focuses on experimental work, up-to-date technology means advance research tools, laboratory techniques, apparatus, and appropriate materials to be used for experiments.”

“Up-to-date technology to me means having the most modern equipment, tools, computer programs, and software. For instance, I want to do a MSC degree in Water Science and Engineering, so I want to have up-to-date modelling software, computer applications, data etc.”

However, unsurprisingly, the importance of technology is lower for those looking to study in other fields, such as Social Sciences, Humanities, Psychology, Law, and historical subjects. For students interested in these subjects, the use of technology and how it is defined is more related to online access to journals and research papers than anything else:

“Online platforms to access study material and online tutorials of courses taught in classroom. A singular online platform to connect to a number of faculty with students.”

“An online library that entails almost all the books/articles that are relevant in any field, combined with a proper workshop on how to find information. Also, the online systems including webmail, blackboard etc. should be fully functional, and easy to understand.”

“Easier online access to resources, use of latest software for data analysis and webinars, and state-of-the-art equipment.”

It is clear that some faculties need to be more concerned with how to communicate their technology-related credentials than others. Furthermore, it reiterates the need for universities to have tailored recruitment strategies for different segments of students, as their priorities, needs and attitudes are likely to differ significantly depending on which subject they are interested in studying.
How do they think technology will change teaching patterns in the future?

Whilst the impact of COVID-19 undoubtedly presents challenges for institutions across the EU, the continual debates around freedom of movement and student funding all threaten the ability of universities in the region to grow. When thinking ahead and looking at how to overcome these challenges, it is important to consider the ability of new technologies and the potential solutions they offer.

As a way of providing some guidance on the potential for new technologies to be used in student learning, we asked prospective international students which technology trends at universities would be most likely to come true in the next 10 years. One of the most popular anticipated scenarios was that most lectures will be online, suggesting that students believe there will be a greater focus on learning through online resources in the future. Interestingly, the most popular anticipated trend was that students would be able to complete a degree and receive a qualification from any institution, regardless of which country they live in. This may imply a more significant reliance on online learning platforms, as their delivery would inevitably lead to a greater focus on distance learning and transnational education over the next decade.

The fact that the top two anticipated scenarios both involve an element of online learning suggests that prospective students foresee a greater presence for new technologies in their degrees in the future. Whilst it is true that they see less of a move towards more advanced technological developments, such as lectures being delivered by robots or via holograms, there is still a view that online channels will make up a more dominant part of studying. Universities need to be prepared to adapt to these changing conditions and consider the views of prospective students carefully if they seek to achieve sustainable growth.

In 10 years’ time, which of the following scenarios do you think will be true of universities?

- Degrees will be shorter in length: 30%
- University degrees will be cheaper than they are now: 31%
- University degrees will be more expensive than they are now: 31%
- There will be more vocational degrees: 33%
- There will be more universities: 37%
- Students will study modules from multiple universities rather than a single institution: 41%
- Universities will be part of continuous learning: 41%
- More people will go to university: 44%
- Most lectures will be online: 53%
- Students will be able to get a qualification from any university regardless of which country they live in: 54%
Now that we have established the potential of online learning from the perspective of prospective students, the next step is to provide some indication of how new online technologies can be most effectively introduced into their learning programmes and which new methods they would most like to see.

We asked prospective students which new approaches to teaching they would most like to see. The most popular answer was a form of blended learning, which combines online resources with traditional classroom methods. This may come as no surprise, given that we have already seen that more overtly advanced technology-related developments (such as holograms and robots) aren’t as widely anticipated, however students still expect to see a greater online presence in their teaching. A method which combines the more established approach of classroom-based learning while incorporating new technologies is likely to appeal the most.

Interestingly however, the second most popular approach was a form of personalised learning which also incorporates Artificial Intelligence (AI) into the classroom. This suggests that as long as students are able to receive a more tailored learning experience which is more beneficial for them, then they are likely to lose any reservations they might have about the use of the technology. The subject of AI is one which has been covered extensively as part of QS wider portfolio of thought leadership. Our work with graduate employers and students has focused on the perceived impact that AI might have on graduate employability and student skill development. It is an important consideration that the increasing use of AI in higher education is seen by a significant minority to pose a threat to graduate employment. However, it is equally important to note that AI can also be used to help students learn more effectively, giving them the potential to gain skills they wouldn’t otherwise have had and making them more employable in ways they hadn’t previously considered.

The third most popular approach was interactive simulations, again using online simulations to deliver teaching content. This suggests that any new technologies used in teaching should be geared towards a greater interactive component between staff and students, which will lead to greater engagement on the part of students and is likely to be positively received. These are some of the approaches which universities should be considering when thinking about how to incorporate new technologies into their degree courses. When done appropriately and effectively, they have the potential to revolutionise the learning experience for international students. Universities need to carefully consider how to introduce these in order to remain relevant to their student cohorts.
Which new approaches to teaching and learning would you most like to experience?

- Blended learning (combines online learning with traditional classroom methods): 57%
- Personalised learning (the creation and delivery of personalised learning content, often using AI): 53%
- Interactive simulations (using online simulations to assess and deliver teaching and learning): 48%
- Immersive learning (delivering learning experiences through the use of Virtual Reality headsets): 38%
- Mobile learning (accessing educational content via mobile devices including phones, tablets and laptops): 38%
- Microlearning (shorter online courses focused on skills-based learning): 32%
- Game-based learning (using games to assess and deliver teaching and learning): 29%
- Online learning: 23%

What are the potential unique selling points and barriers to online learning?

Having established the extent to which higher education will change over the course of the next decade to incorporate greater elements of online learning, we can now turn our attention to benchmarking current levels of interest in online courses. It is important to do this so that any future increase in interest can be properly documented and evaluated. The fieldwork for this survey began in October, before the first documented case of COVID-19 and certainly before anyone could have envisaged its impact on the higher education landscape in 2020. As a result, interest in online learning is likely to have increased rapidly in the last few months, however this still provides a useful benchmark to compare any future evaluations.

When asked how interested they would be in studying for their degree via a variety of online platforms, 28% expressed some interest in online/distance learning, 31% were interested in massive open online courses (MOOCs), while 45% were interested in a blended form of study incorporating both online and in-person teaching elements. Whilst individually, these do not represent a significant proportion of the prospective student population, taken as a whole, 58% were interested in at least one of these forms of online delivery. This suggests a significant proportion would be happy to study at least part of their degree online and that online learning has sufficient market potential to warrant further attention.
Of further note, interest in these study forms has seen a consistent increase over the course of the last few years. We have already mentioned that fieldwork for the survey began well before the outbreak of COVID-19, which implies that any increase in interest in online platforms is not fuelled by the outbreak of the disease and instead represents a genuinely heightened interest in learning via this medium. In 2018, only 21% were interested in online or distance study, 27% were interested in MOOCs and 33% were interested in blended study. Overall, only 48% were interested in learning in one of these forms.

These trends demonstrate that compared to only a few years ago, there is significantly greater interest in online learning platforms, which in turn suggests a fundamental shift in prospective student mindsets. With the outbreak of COVID-19, there may yet be an even greater shift towards online learning in the years to come. It remains to be seen whether, once we emerge from the COVID-19 crisis, the status quo will reassert itself and we will see face-to-face teaching become the dominant mode of delivery again or whether this year marks the start of a greater focus on online learning and a new era for the higher education sector.

How interested are you in the following delivery options? (% who are very or somewhat interested)

![Chart showing interest in delivery options]

The next stage of our analysis is to look at those who are interested in online study and why they would consider it, to see if the positive aspects of this mode of delivery can be communicated to other prospective students. By contrast, we can also look at the barriers to online study and whether these can be similarly addressed in communications with this audience to help further increase interest in online study.

The option to work while studying and the flexibility it offers to students are the most important perceived benefits when looking at why this audience would consider an online degree. The two reasons are inextricably linked and provide additional components for universities to consider when promoting online degrees. The option for students to self-fund their way through their studies without having to take a break in their career is a key consideration for prospective students. Whilst the cost savings aren’t as prominent for an online degree compared to an in-person
degree, the comparatively high tuition fees that many international students have to pay when studying in the EU is another factor here when considering the benefits of online study.

Studying for an online degree and the flexibility which comes with this seems to be an attractive option for an increasing number of students who must continue working while studying at university. Any study options which make it easier for them to balance these two activities will undoubtedly resonate. The flexibility that online degrees offer and the option for the student to continue working while studying should be promoted as a lead selling point for online degrees, rather than the cost savings. Being able to study for a degree without needing to pause their careers is likely to be the most attractive selling point for online degrees.

Why are you interested in studying for an online degree?

- I can study while working: 75%
- Flexibility: 75%
- Convenience of studying from any location: 72%
- Cost: 65%
- I enjoy having access to study materials online: 55%
- I don't need to relocate to gain the benefits of an overseas degree: 43%

By contrast, we can also look at the barriers to studying for an online degree by asking those who weren't interested in any form of online study why this was the case. The most prominent barrier for universities to address is that prospective students want access to the facilities of a university and all the inherent benefits that they provide. There are no easy solutions for universities here, one possible avenue for universities is to develop their international partnerships with institutions overseas to see if they can come to mutually beneficial arrangements. This would allow online students access to the facility of a university in their home country, in exchange for online learners at the equivalent institution to have access to their own facilities.

The lack of contact with fellow students in an online degree setting is also a prominent barrier. It is therefore vital that online degrees ensure there are options for online students to meet virtually and that there are opportunities to debate the subject matter in a 'live' setting. This interaction is seen as a key part of any university experience and one that online courses must seek to replicate. The final factor to consider is that many prospective students want the benefit of living in another country. Throughout the many years we have been running this survey, it is clear that the experience of living elsewhere and the opportunity for exposure to new teaching methods, cultural experiences, and networks are some of the biggest perceived benefits of studying overseas. It is no surprise to see this emerge as a prominent barrier to the notion of online study and universities need to be aware of this by identifying the most appropriate prospects to promote the idea of online study to.
Why are you not interested in studying for an online degree?

- I want access to the facilities of a university: 80%
- I want to meet other students: 74%
- I want to live overseas while I study: 65%
- I need the structure of scheduled classes: 61%
- I feel like I would be isolated studying online: 59%
- I am concerned about teaching quality from an online degree: 56%
- Value for money: 28%
Section 4
Best practices for communicating with international students

Key findings

- Information about accommodation, practical tips to help with their application and avenues to connect prospective with current students are all important factors
- It is important for prospective students to be able to contact a university via their preferred channels, with email, WhatsApp and phone being the most popular
- Use of individual social media platforms when researching universities is continually increasing
- There is currently a disparity between the level of service that prospective students would like to see from universities when making enquiries and the level of service they currently receive

What are the most important topics to talk about when communicating with prospective students?

The process for researching various universities has altered significantly in recent years and the way that information is gathered and filtered has undergone a dramatic shift. Prospective students are now able to make more informed and better decisions than ever before, owing to the vastly different array of information sources available to them. Not just that, but the way individuals communicate with each other is fundamentally different, with ever faster interactions driven by the rise of social media platforms. This element of instant communication is now a part of the lives of prospective students and it has implications for universities as well. Expectations on universities when responding to their student enquiries are significantly greater than before. The demand for an instant response means universities must ensure that they invest their resources accordingly to meet these expectations. In 2020, prospective students are subjected to more interactions, advertisements and information than any other previous generation. Universities need to ensure that their messaging and communication strategies are targeted and relevant so as not to be lost to the ‘noise’ of everyday life.

This section will examine what information topics are most important to prospective students, before moving on to the ideal service they would like to receive from universities when making enquiries and how social media fits into this service. We will conclude by looking at the level of service they are currently receiving and identify whether there is a gap between the level of expectation and the current level of service. Universities need to allocate their resources appropriately, in order to manage the enquiry to enrolment process for their prospective students and to adapt to changing student expectations.
To start with, we will look at what topics of information are deemed the most important by prospective students when researching universities. The most valued information topic is about student accommodation. In previous iterations of the ISS, we have highlighted that one of the main concerns of prospective students is the problem of finding suitable accommodation during their studies. It therefore makes sense to see this emerge as one of the most valued topics that they can receive information about.

Another important topic is that they are looking for practical tips to help with their application. This suggests that prospective students feel the support they currently have when completing their application is lacking, therefore any practical information that universities can provide on the subject is likely to resonate with this audience.

The final topic to mention which is seen to be important by prospective students is the ability for them to ask questions of current international students and connect with them. Again, from previous iterations of the survey, we know that an effective strategy to alleviate some of the concerns that prospective students have when studying overseas is for them to be able to establish peer-to-peer connections. Being able to effectively connect these two audiences has the potential to provide a key benefit for universities as they look to support their prospective students along the enquiry and application pathway.

Prospective students seem happy to receive information about a diverse range of subjects and will be researching multiple areas of interest across the application process. This is evidenced by the fact that they selected six information topics from within the list given to them on average. This suggests that in order to effectively nurture their enquirers and applicants, universities need to ensure they have the capabilities to deliver a range of content to their prospects.
Which new approaches to teaching and learning would you most like to experience?

<table>
<thead>
<tr>
<th>Approach</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation information</td>
<td>61%</td>
</tr>
<tr>
<td>Practical tips to help with your application</td>
<td>59%</td>
</tr>
<tr>
<td>Connect with existing students to ask questions</td>
<td>59%</td>
</tr>
<tr>
<td>Information about the teaching staff's experience and qualifications</td>
<td>57%</td>
</tr>
<tr>
<td>Information on work placements and links to industry</td>
<td>55%</td>
</tr>
<tr>
<td>Visa guidance</td>
<td>53%</td>
</tr>
<tr>
<td>Stories about current and former international students</td>
<td>48%</td>
</tr>
<tr>
<td>Meetings with admissions staff at fairs or information sessions</td>
<td>46%</td>
</tr>
<tr>
<td>Virtual tours of the university</td>
<td>35%</td>
</tr>
<tr>
<td>Live online chats with university staff</td>
<td>34%</td>
</tr>
<tr>
<td>Imagery/photographs of the university</td>
<td>33%</td>
</tr>
<tr>
<td>Photo/video ‘Stories’</td>
<td>24%</td>
</tr>
<tr>
<td>Live videos (e.g. Facebook Live, Instagram Live etc.)</td>
<td>22%</td>
</tr>
</tbody>
</table>

An important follow-up step is to look at how frequently prospective students want to receive information about these subjects from universities. Establishing the optimum level of communications that universities can send out is crucial to forming the basis of an effective conversion strategy for the sector, combining the most important topics with the frequency this information can be imparted.

We asked prospective students how often they would like to hear from universities at each stage of the enquiry and application process, to get an idea of the frequency they would like to be contacted. The results to this question highlight that this audience would like to be contacted with information about a variety of subjects on a regular basis. Nearly 80% would like to be contacted at least weekly and anything from a third to a quarter of them would like to be contacted daily, depending on whether they are in the enquiry or application phase. It is also worth mentioning however that at the enquiry stage, a significant minority of 11% would only like to be contacted by a university when the student makes the initial contact. This reinforces the point that universities need to be able to target content appropriately, according to the audience’s preferences.
Taken as a whole, however, these results suggest that from the beginning of the enquiry process, universities can engage in frequent communications with their prospective students as they are happy to receive information about a variety of topics. To help this audience through the decision-making process, universities need to act as a guide and to build effective nurture campaigns which will allow them to communicate with these prospects on a regular basis. Ensuring they have the required information on the most desired marketing communications is essential and conducting such campaigns will help to maximise conversion through to enrolment by alleviating prospective student concerns.

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

<table>
<thead>
<tr>
<th>Stage</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>Only when I contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>After I make an enquiry</td>
<td>34%</td>
<td></td>
<td>45%</td>
<td>9%</td>
<td>2%</td>
</tr>
<tr>
<td>After I apply</td>
<td>24%</td>
<td></td>
<td>52%</td>
<td>16%</td>
<td>2%</td>
</tr>
<tr>
<td>After I receive an offer</td>
<td></td>
<td>32%</td>
<td></td>
<td>48%</td>
<td>14% 2% 5%</td>
</tr>
</tbody>
</table>

What channels and social media platforms do prospective students prefer to use when communicating with universities?

The proliferation of social media platforms has been well documented in recent years. Subsequently, their value to universities has also exponentially increased as they have come to dominate more parts of not just everyday life, but also the process of information gathering for prospective students. Universities need to ensure they are communicating effectively and efficiently with this audience and they can only do that by investing their resources accordingly. Prospective students will be at the forefront of this trend as they are the most likely audience to become early adopters of new platforms and technologies.

Nevertheless, questions remain about how universities should interact with prospective students using social media platforms and where they sit alongside more established channels. In this section, we look at the most popular channels and where social media sits within these, before going on to look at the use of social media in more detail, focusing on when it is used and which platforms are most popular.

We asked prospective students which channels they would prefer to use when communicating with a university. Email was cited as the channel this audience would most like to use, with 92% selecting this option. Furthermore, nearly half of prospective students prefer to use phone calls and nearly a third are happy to use text messages to communicate. Interestingly, however, nearly two-thirds of prospective students would prefer to use WhatsApp when communicating with a university. The next most popular messaging platform is Facebook; however, this is less than half as popular as WhatsApp, with only 29% happy to use this.
One important conclusion to highlight from this data is that traditional and well-established communication channels remain vitally important for universities when speaking to their prospective students. Traditional platforms remain by far the most preferred and for some the only way of getting in contact with a university. This means that while universities are rightfully investing ever greater amounts of resources in their social messaging platforms, reflecting their growing use, this investment shouldn’t be at the expense of ‘traditional’ media platforms, as they remain widely used.

Another conclusion to draw from this is that in terms of social messaging channels, it is most important for universities to have the ability to communicate with prospective students via WhatsApp. This is by far the most widely used social messaging platform by those in the enquiry and application phase and it is significantly more popular than any competitors. The data from this question would suggest that for universities, a combination of traditional and social messaging channels is likely to be the most effective and far-reaching means of communicating with their prospective students. By directing their resources towards the most widely used channels (email, WhatsApp and phone calls), universities can more effectively nurture their prospects along the enquiry to enrolment pathway.

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

<table>
<thead>
<tr>
<th>Communication Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>92%</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>62%</td>
</tr>
<tr>
<td>Phone call</td>
<td>47%</td>
</tr>
<tr>
<td>Real time chat/messaging on the university website</td>
<td>30%</td>
</tr>
<tr>
<td>Facebook</td>
<td>29%</td>
</tr>
<tr>
<td>SMS/text message</td>
<td>29%</td>
</tr>
<tr>
<td>Skype</td>
<td>24%</td>
</tr>
<tr>
<td>Letter</td>
<td>16%</td>
</tr>
<tr>
<td>Telegram</td>
<td>12%</td>
</tr>
<tr>
<td>Twitter</td>
<td>11%</td>
</tr>
</tbody>
</table>

It is clear that social media does have a role to play when researching universities. However as we mentioned before, fundamental questions still remain about at what stage in the decision-making process social media should be used and how can universities allocate their resources effectively to maximise their presence on the variety of platforms which are available to prospective students.

Last year, we highlighted that over four out of five prospective students will use social media when researching universities. This year, that statistic is the same, however it is important to note that its use is heavily weighted towards the initial stages of the application process. Over two-thirds of prospective students use social media in the enquiry stage, which is significantly higher than any other part of the application cycle. Only around 20-30% of this audience will use it when filling out their application and deciding on their offers from universities. This means that social media is seen as more of an information gathering tool in the early stages of the journey and not used to help them make their final decisions on where to study. Universities need to tailor the content on their social media platforms accordingly, bearing in mind that most prospective students who visit the site will only be doing so at the start of the process.
Do you use social media as part of the research process when deciding where to study?

- When finding information before I make an enquiry: 67%
- To help when making an application: 30%
- After I’ve accepted an offer, to help me plan to move: 22%
- When deciding whether to accept an offer: 22%
- After I’ve made an enquiry: 20%
- I don’t use social media during any of these stages: 16%

In previous years, we have highlighted how a large-scale social media presence and international recruitment are closely related and that many universities are actively judged by their social media offering. To highlight the growing pervasiveness of social media platforms in everyday life, we asked prospective students which platforms they used for research when making decisions about studying overseas. Unsurprisingly, Facebook emerged as the most popular social media platform for research, whilst YouTube and Instagram were also used by over half of all prospective international students.

When it comes to researching information about universities, all five of the largest social media platforms have seen significant year on year increases in usage going back to 2018. This reaffirms the dominance of social media platforms and how they have come to be a significant part of the lives of prospective students. Universities need to ensure they have a presence on as many platforms as possible. On average, respondents selected at least three different platforms that they would use to research universities. This suggests that prospective students are going to a broader range of platforms than they have in the past, reinforcing the notion that universities need to have a broad social media presence.

Another important element of note is that prospective students from China will also be going to their own social media sites, such as WeChat and Weibo. However, a similar trend is seen here; Weibo has seen a 16% increase in usage from 2018 to 2020, rising from 44% to 60% whilst WeChat is now used by nearly three-quarters of prospective students from China (73%). The use of these platforms varies considerably across different nationalities, however the upward trend of their increased use by prospective students is the same the world over. It is vital that universities continue to invest significant levels of resource in social media, as their presence will need to stretch across a multitude of platforms and services to reach as diverse a global audience as possible.
Which of the following types of social media do you use for research when making decisions about studying overseas?

- Facebook: 60% (2018), 61% (2019), 70% (2020)
- YouTube: 42%, 53%, 57%
- Instagram: 31%, 39%, 50%
- LinkedIn: 28%, 34%, 40%
- Twitter: 18%, 24%, 30%

What does the ideal service look like for prospective students when communicating with universities?

Now that we have established the content and platforms which are most preferred by prospective students, we can look at the speed of response and level of service they expect from universities when making enquiries. To establish the level of service they would ideally like to see, we can first look at their underlying attitudes to see if there is a mismatch between the level of service they expect compared to what they currently receive.

When asked about their attitudes towards communicating with universities, 92% claimed that it was either fairly or very important that they didn’t have to wait very long to hear back about their enquiry, which reiterates the notion that speed of response is vitally important for universities when handling enquiries from prospective students. They need to ensure they can respond to each enquiry in as timely and efficient a manner as possible and have the resources in place to be able to do this. In an age where the majority of communication is both personalised and instantaneous, it is more important than ever that they are able to do so. Our research indicates that any enquiries which take longer than 24 hours to be responded to have the potential to alienate the prospective student and for them to dismiss the university in question. The speed with which a university can respond to any given enquiry is likely to form a lasting impression in the mind of the student.

Whilst response time is undoubtedly important, it is almost as important that prospective students can communicate with universities via their preferred platforms, with nearly four out of five members of this audience citing this as an important factor. We have already covered which platforms are most widely preferred when communicating with universities, however it is worth reiterating the necessity of universities having the ability to communicate across all of these and its importance to prospective students.
Finally, nearly seven in 10 prospective students would like to be able to contact a university outside of normal working hours. This suggests that being able to communicate with prospective students across multiple channels and outside the normal eight-hour working window is important for universities and they need to invest in comprehensive strategies to allow them to do so. These attitudes extend across different student cohorts and nationalities. Investing in these strategies takes a considerable amount of resource and time, thus representing a huge challenge for different universities. Those who do choose to engage on this strategy will benefit from a more effective and efficient conversion strategy, which is able to bring enquirers along the application process and through to enrolment.

When communicating with a university about an enquiry or application, how important are the following?

- **That I can speak to someone outside of business/school hours**
  - Very important: 31%
  - Fairly important: 38%
  - Not very important: 25%
  - Not important at all: 6%

- **That I can communicate using my preferred platform**
  - Very important: 44%
  - Fairly important: 35%
  - Not very important: 18%
  - Not important at all: 4%

- **That I don’t have to wait very long to hear back**
  - Very important: 62%
  - Fairly important: 30%
  - Not very important: 7%
  - Not important at all: 2%

The data from this survey aims to highlight that when it comes to responding to enquiries from prospective students, doing so in a timely and personalised manner is of the utmost importance. The final part of this analysis seeks to demonstrate that this is an area which is deserving of greater attention by universities by examining the current level of service they are providing.

We asked prospective students how quickly they would expect to receive a response from a university when making an enquiry. Nearly 60% expected an acknowledgement of said enquiry within one day whilst a third expected a complete and personalised response to their enquiry in that same 24-hour window. The fact that such a low proportion would expect to receive a response from a university in one day of contacting them suggests that expectations of universities are relatively low in this regard. With 38% expecting a response to their enquiry within three days, this seems to be the normal level of expectation from a university. However, this should be of some concern, given that we have just seen the importance of not having to wait very long to hear back from a university. The data from this survey suggests that it is an important subject to prospective students, however they have low expectations of universities to be able to deliver on this. Universities need to invest more in this area so that they can meet the expectations and demands of prospective students with a view to raise their expectations.
How quickly would you expect to receive a response from a university at the following stages?

- A complete and personal response to my enquiry: 33% within 24 hours, 38% within 3 days, 23% within 1 week, 6% within 1 month.
- An acknowledgement that the university has received my enquiry: 56% within 24 hours, 24% within 3 days, 14% within 1 week, 4% within 1 month.

The low level of expectations is reiterated when we come to look at the experience that many prospective students actually have when making enquiries at universities. For those who had made an enquiry, only 29% had received a response to their question within 24 hours. Another 33% had received a response within three days while an additional 31% had to wait up to a week or longer to receive a response. This goes some way towards explaining why expectations of universities are so low in this regard and it should be of some concern that such a significant minority have to wait so long to get a response from a university. It also reiterates that depending on which institution they submit their enquiries to, prospective students can receive vastly differing levels of service. As a way of setting themselves apart from other institutions and seeing the benefits of doing so, universities can invest in this area to provide a better experience for prospective students.

It is clear that there is currently a disparity between the level of service that prospective students actually receive when submitting enquiries to universities compared to the level of service they would like to receive and the importance that they assign to this area. For them to be able to make more informed and better decisions on their application, universities must invest further in this area to help prospective students. Most students would like to see a response to their enquiries within the 24-hour window of submitting them. Concurrently, most universities fail to live up to their expectations in this regard, so it is important that they allocate and invest their resources more effectively to enable them to respond to enquiries more quickly. If they are to continue to be seen to be relevant to the student audiences they serve, universities need to invest at a time when the manner of communication is changing so rapidly.

Thinking back to the last time you made an enquiry at a university, how long was it before they personally responded to your question?

- In 24 hours: 29%
- In 3 days: 33%
- In 1 week: 21%
- In 1 month: 8%
- In 3 months: 2%
- Can't remember: 6%
Key findings

- Prospective students will speak to a variety of individuals about their studies and aren't just limited to their close family networks for information.
- They will speak to different individuals about different decisions and will discuss their choice of country with family members, but go to advisors when deciding on their course.
- Safety is the most important issue for parents of prospective students, followed by the choice of course leading to the right job.
- International education agents are used by around a third of all prospective students, who see them as a trusted source of information on studying overseas.

Who will prospective students speak to when making study decisions?

Having established the importance of various factors throughout the decision-making process, it is also necessary to examine the individuals who exert an influence on the student and guide them when making these decisions. In the past, the ISS has sought to highlight the role of personal networks of contacts and how they can influence prospective student decision making. Previous iterations of the survey have noted that over two-thirds of prospective students know either a friend or family member who is currently or has previously studied overseas. Word-of-mouth recommendations, especially those which come from their own peer groups, tend to carry far more gravitas for students when compared to information imparted via more official channels or anything they might learn directly from the university itself. In this section, we will first look at which individuals prospective students will speak to when making decisions and crucially, what they are speaking to these individuals about, before moving on to focus on the influence of parents and international education agents in more detail.

When asked who they had discussed their study options with, nearly two-thirds claimed to have spoken to their parents who are by far the most influential party for prospective students. In this section we look at the role of parents and where they are seen as the most knowledgeable sources of information. Around 8% of prospective students will only speak to their parents and no-one else, so it is worth reiterating that for a significant minority, parents are the sole influence on their decision making. Additionally, nearly two-fifths will speak to their siblings and just over a quarter will also speak to other family members. In total, three-quarters of prospective students will speak to at least one family member about their study decisions. This demonstrates the extent to which prospective students rely on their immediate network of close family members for recommendations. Universities need to be aware of this when
considering how to reach and influence prospective students.

Interestingly however, it is not just close family networks who can influence prospective students: 43% will speak to advisors at their current place of learning and 40% will go to ambassadors from a university they are interested in attending. Crucially, a fifth will also speak to an international education agent about their study decisions. We look at the role of agents in later sections and how they can influence the decisions of a significant proportion of prospective students and the potential they have to change international student flows. In total, two-thirds of prospective students will speak to someone outside their own family networks, which suggests that they gather information from a range of individuals and aren't necessarily limited to their own family for recommendations. Universities need to be aware of this and factor it into their strategies to attempt to extend their own influence through as many of these channels as possible. We should also consider the importance of international alumni networks here, as the potential to attract new international students through word-of-mouth recommendations is significant. With the long-term aim of improving their word-of-mouth reputation through established alumni networks, universities should ensure they are able to provide a welcoming environment for their international students during their studies.

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

- Parents: 62%
- Advisors at my current school/college/university: 43%
- Student ambassadors from university of interest: 40%
- Brothers/sisters: 39%
- Other family member (not parents or siblings): 26%
- Agent: 19%
- None of the above: 7%

Now that we have established which individuals are most influential in the decision-making process for prospective students, we can turn our attention to what subjects they will speak about with each of these individuals. The data suggests that prospective students tend to speak about different elements of their studies with different people. It is clear that family members (including parents, siblings and other relations) are most likely to be spoken to when it comes to choosing which country they want to study in. It is clear that parents are a key influence on their children, and it is felt most keenly when it comes to their choice of country. We have already seen that when prospective students choose a country to study in that it is a safe and welcoming destination to international students is by far the most important element to them. Safety is a key consideration for parents as well as this will form a key part of their discussions and priorities. Universities need to bear this in mind when communicating with parents and emphasise the support structures they have in place for international students to demonstrate their safety credentials. These messages are likely to resonate most with parents which in turn will feed into the decisions made by their children.
When it comes to choosing a course, prospective students are most likely to speak to either advisors at their current place of learning or student ambassadors from a university they are interested in. We have already seen that when it comes to choosing a course, a pathway to their chosen career is of the utmost importance to them, so it is likely that they are speaking to these particular individuals because they feel they are the ones who are best placed to advise them on which courses they should be applying for. The knowledge about which courses are appropriate for their chosen career path likely sits with these individuals, hence their influence on this stage of the decision-making funnel.

Finally, international education agents are unsurprisingly, most likely to be spoken to when it comes to their choice of university. We know that when it comes to choosing a university, that it offers scholarships, a welcoming environment, and high quality teaching are of the utmost importance. It is likely that these are the subjects which prospective students are looking for the most information on when speaking with international education agents. Universities need to bear all of this in mind when communicating with prospective students and especially when considering the role of their student ambassadors. For them, they are most likely to be seen as a trusted authority on which course is right for the student, suggesting this is the positioning and strategy which needs to be adopted for these influencers.

What have you discussed with these people?
How influential are parents when it comes to student decision making?

We have already seen that parents are a hugely significant influence on prospective student decision making and that this influence is felt most obviously when it comes to choosing a country. However, there are a number of factors at play when considering the role of parents. It is relatively well known that parents exert a huge amount of influence, however the extent to which students own up to this fact has in the past been the subject of some debate. Cultural differences mean that at times, the influence of parents is somewhat greater than the student will admit to, which can cause issues for universities when gauging the importance of this audience. The data from this survey seeks to understand in more detail the role of parents as seen from the perspective of the student, however more research is needed amongst parents to fully establish their role and priorities in the decision-making process.

When asked how influential their parents were in their study decisions, nearly half admitted to them having either a lot or a fair amount of influence while roughly a fifth of prospective students claimed that their parents had no influence at all. This reinforces the point that parents are seen to be an influential source by their children when making decisions about their studies, however the extent to which this is felt varies significantly across different nationalities. Universities should consider the extent to which parents exert their influence and develop specific communications targeted at this audience in recognition of the fact that they will play a vital role in the decisions made by prospective students. Parents will have their own priorities and elements which they regard as important, so providing information about these will be vital in swaying their opinion.

Overall, how much influence do your parents have in your decisions about where and what to study?
When asked what prospective students think their parents find important, the results reiterate several points already made. Safety is cited by 40% as the most important element to parents, which emphasises the notion that when prospective students are speaking to their parents about their choice of country, how safe and welcoming that country is to international students is an issue which frequently comes up in conversation. Universities need to develop communication threads which focus on the support they offer to international students and demonstrate their safety credentials as this content is likely to resonate, especially for parents of prospective students.

This issue is even more pertinent in 2020 following the outbreak of COVID-19. Universities which can demonstrate their commitment to student safety both on and off campus are likely to see an enhanced reputation further down the line. Measures to protect students, such as moving lectures online where possible, providing antibacterial gel on campus and implementing measures to allow social distancing are all helpful ways to demonstrate this. However, student safety is also a topic which needs to be communicated at a broader level which means that ensuring international students will be made to feel welcomed and nurtured in day-to-day life on campus is just as important. Universities which can develop the strategies to communicate these effectively to parents are likely to feel the benefit as part of a long-term strategy.

Another important element to emerge is that the course the student chooses is one that they want to study and one which will lead to their chosen career. This relates to another important priority for prospective students, namely that the course they study will lead to them being able to work in the job they want. This means that future career considerations and graduate outcomes are further elements which are essential for universities to focus on when communicating with parents of prospective students. However, the prestige of a university isn't perceived to be important by parents, nor is the enjoyment that students might expect from studying abroad. It is important to consider these when developing communication strategies for parents as the prestige and arguably overall reputation are both seen to be less important.

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

<table>
<thead>
<tr>
<th>Aspect</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety of the destination</td>
<td>40%</td>
<td>22%</td>
<td>16%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Studying the course I want to study</td>
<td>25%</td>
<td>26%</td>
<td>24%</td>
<td>17%</td>
<td>9%</td>
</tr>
<tr>
<td>Studying a course that will get me a good job</td>
<td>20%</td>
<td>25%</td>
<td>23%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Prestige of the university</td>
<td>9%</td>
<td>14%</td>
<td>18%</td>
<td>23%</td>
<td>36%</td>
</tr>
<tr>
<td>Whether I will have an enjoyable experience</td>
<td>7%</td>
<td>14%</td>
<td>19%</td>
<td>27%</td>
<td>34%</td>
</tr>
</tbody>
</table>
How influential are international education agents when it comes to student decision making?

We have already seen that a significant minority (19%) have spoken to an international education agent to help them make decisions about studying overseas. This would suggest that when compared to other individuals, agents play a smaller role when influencing prospective international students, especially given that they only really become actively involved at the end of the decision-making process when it comes to choosing a university. But their influence is undoubtedly growing and their role within the higher education sector is becoming ever more important. This is especially true for some core markets, such as China and India, where the sheer size of both markets means direct recruitment can often be challenging and resource intensive. This means the use of such agents is common practice in such markets, particularly when trying to reach all the main areas where prospective students originate from. This can make direct recruitment challenging; therefore, it is vital that universities are able to establish and maintain positive relationships with their international agents to aid their recruitment strategies.

When asked whether they have used or were planning to use an agent, 11% claimed to have already used one and a further 24% were considering the use of one. Obviously, the influence of international education agents varies significantly for different countries and whilst they have a significant presence in higher education markets in Australia and New Zealand, they are arguably less common in European markets. However, the fact that such a significant minority either have already used or would plan to use an agent is further proof that they have the potential to significantly alter international student flows. For the majority, international education agents currently have a fairly limited role in the decision-making process, but they do have the potential to expand their influence in the future and to have a larger presence within the sector. Universities need to be aware of this and plan their recruitment strategies accordingly to ensure they have a relationship with their agents based on mutual trust and coordination.
Are you planning to, or have you already used an international education agent?

- 24% Have used an agent
- 44% Planning to use, but haven't yet
- 11% Not planning to use an agent
- 21% Unsure

It is also important to look at current perceptions of international education agents to see where prospective students see them as being of most value. The overarching view seems to be that agents don’t have significant amounts of influence on the final decision of their choice of country or university; however, they are viewed as a trusted information source. Whilst over two-thirds of those who use agents see them as a trusted information source and over 70% agree that they are useful in helping them to study overseas, only 37% agree that they are influential when it comes to actually choosing a university and even fewer agree that they are influential when it comes to choosing a country. This data is especially revealing, given the barriers that agents can sometimes put in place to hinder the university from communicating directly with the student. If agents are the single information source for the student, then it prevents the student from making an informed decision. The data here suggests it is likely that students are aware of this, hence their reservations when being guided by agents in their choice of country and university. This suggests that prospective students don’t see agents as being a particularly significant influence on which university they ultimately decide to go with. Whilst it is commonly known that within certain markets, agents are sensitive to the amount of time they receive from universities and will always look to build meaningful relationships with individual members of staff. This expectation of regular contact, training and preferential treatment needs to be carefully considered, given the data shown here, which suggests that agents only play a relatively small role in the decision-making process.
Do you agree or disagree with the following statements about international education agents?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agents are useful in helping me study overseas, but they don’t influence my decisions</td>
<td>10%</td>
<td>10%</td>
<td>18%</td>
<td>44%</td>
<td>18%</td>
</tr>
<tr>
<td>International education agents are a trusted source of information on international study</td>
<td>7%</td>
<td>9%</td>
<td>28%</td>
<td>43%</td>
<td>14%</td>
</tr>
<tr>
<td>Agents influence my choice of university</td>
<td>13%</td>
<td>21%</td>
<td>29%</td>
<td>32%</td>
<td>5%</td>
</tr>
<tr>
<td>Agents influence my choice of country to study in</td>
<td>16%</td>
<td>23%</td>
<td>30%</td>
<td>27%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree
Section 6
The importance of graduate outcomes in student decision making

Key findings

- Most international students would only look to remain in the country after they graduate for as long as their post-study work visa allows
- Over half of all prospective students would like to enter the world of work after they graduate with many wanting to go into jobs at multinational organisations or into government sector roles
- The graduate employment rate and the speed with which graduates can find work are of the utmost importance to them
- Problem solving, leadership and technical skills are seen to be the most valued skills that a university can provide to its students

What are prospective students plans for remaining in the EU after they graduate?

Post-study work rights and graduate outcomes in different countries have been the subject of much debate around the world. The length of time that graduates can remain in the country they study in varies considerably from country to country, ranging from only six months in the US to as much as four years in Australia. Many countries have endeavoured to increase the amount of time that international students can remain, in a bid to make themselves as attractive as possible to this audience. It is generally felt that such moves help to demonstrate that the country is welcoming and friendly towards international students and has institutions which are supportive of this group. It is important to examine the leniency and awareness of post-study work rights to see how they impact the plans of prospective students after they have graduated.

As a starting point, it is useful to examine what prospective international students' plans are after they graduate and whether they plan to return home. A significant proportion of 23% claimed to want to return home immediately after finishing their studies when they were asked this question, however the most popular plan was to remain in the country as long as their post-study work visa allowed them to before returning home with 40% of prospective students selecting this option. This suggests that post-study work rights are an important factor in the decision-making process for significant numbers of prospective students. It is also worth mentioning that only a minority of 13% claimed to want to settle permanently by remaining in the country they study in indefinitely. There is a significant amount of uncertainty around the number of international students who overstay their visa and choose to remain indefinitely.
as various studies and different data sources show conflicting data. However, the data from this survey suggests that the intentions of prospective international students are far less focused on remaining indefinitely than some studies would suggest and that overly strict restrictions on international students in some countries are unnecessary.

When comparing these numbers to those of previous years, the results are remarkably similar. In 2019, 20% of prospective students planned to return home immediately whilst 42% intended to remain on a post-study work visa with 16% intending to remain indefinitely. This implies that whilst post-study work rights form an important priority as part of prospective student decision making, their views aren't changing and the status quo seems to be holding up for international students in the wake of significant uncertainty and changing international student flows. It is well known that the post-study work rights of international students vary considerably from country to country. The fact that there is such variance across the world suggests that there is significant potential for them to affect student decision making and universities need to bear this in mind when developing strategies to nurture their prospective international students.

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

- Don't know: 16%
- Go elsewhere: 7%
- Stay in country permanently: 13%
- Stay for up to 6 years then return home: 8%
- Stay for up to 3 years then return home: 9%
- Stay for up to 2 years then return home: 11%
- Stay for up to 1 year then return home: 12%
- Return home immediately: 23%

What do they plan to do after they graduate and how does this relate to the importance of graduate outcomes in their decision making?

We have highlighted how important it is for prospective students that their course leads to their chosen career. These considerations not only take place at the very beginning of the application process but will also be at the forefront of their thoughts as they continue through to enrolling at a university and as they progress through their studies. Graduate outcomes form a significant factor in the decision-making process for prospective students and they have the potential to affect their choice of countries and institutions. It is therefore important to look at what their plans are once they have graduated to identify the optimum point at which universities can communicate their credentials in this area.
Over half of all prospective students claim to want to go straight into work when asked what they plan to do after graduating. The vast majority of those who didn't want to go into work claimed to want to pursue some other form of qualification in higher education. The fact that so many prospective students want to go into work straight away may be unsurprising. However, this trend applies not only at an overall level, but also across different student cohorts and is true regardless of whether they plan to return home immediately, to remain in country on a post-study work visa or to remain indefinitely. This reinforces the notion that it is important for universities to have well-connected careers centres which can support their international students by finding work in their respective fields. Educating them on the skills they have gained whilst at university which make them valuable to potential employers is vital if students are to be able to communicate these in a clear and persuasive manner. It is also important that careers services are aware of where most prospective students want to try and work. Many of this audience would like to work in large multinational organisations (56%) or government sector roles (51%). Knowing how students and graduates alike can communicate that they have the skills required to flourish in these types of jobs should be a crucial aim for careers services within universities.

The opportunity for universities here is clear, by helping their international students to plan for their lives after graduation through the use of their careers services, universities can help to add to the value of the degrees they award and enhance their reputation amongst their international student alumni.

What do you plan to do after graduating?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>53%</td>
</tr>
<tr>
<td>Postgraduate study (Research)</td>
<td>14%</td>
</tr>
<tr>
<td>Other further study</td>
<td>13%</td>
</tr>
<tr>
<td>Postgraduate study (Coursework)</td>
<td>13%</td>
</tr>
<tr>
<td>Don't know</td>
<td>3%</td>
</tr>
<tr>
<td>Take some time out (e.g. for traveling)</td>
<td>3%</td>
</tr>
<tr>
<td>Undergraduate degree</td>
<td>1%</td>
</tr>
</tbody>
</table>

Bearing these plans in mind provides important context for the next stage in our analysis, which concerns what topics are important to prospective students when assessing graduate outcomes at an institution. Since we know the importance of future career considerations and how influential they can be in the decision-making process, it is important to be aware of these as they have the potential to influence students when they come to make decisions about which universities to apply to.

The graduate employment rate is, perhaps unsurprisingly, the most important metric for evaluating graduate outcome measures. For those institutions with effective and well-developed careers centres, this represents a clear opportunity as they can demonstrate their commitment to helping their students to find graduate-level jobs. By distilling their career service credentials into a single, easily understood metric, it provides the simplest measure to communicate to prospective students that it is an area they take seriously.
The second most important graduate outcome is the speed with which graduates can find a job. This is likely to be a uniquely high priority for international students as their post-study work rights are significantly more restrictive than they would be for domestic students of any EU nation. Given the variance across different countries and the speed with which they must find a job in some of these countries after graduating, it is unsurprising to see this emerge as an important topic. As more EU nations develop strategies to actively enrol greater numbers of international students, it will be interesting to see if this coincides with a loosening of post-study work rights restrictions and a change in the priorities of international students when thinking about graduate outcomes at a university.

The final measure to refer to here concerns the importance of a high rate of students going into their preferred industry. It is important to consider this against a backdrop of the most popular subjects for international students looking to study in the EU, which are Business, Engineering and Computing. Given that these subjects will provide highly skilled graduates in areas where expertise is desperately needed, it is important for universities and governments throughout the EU to consider the potential for international students to help fill employment gaps. The link between the graduates from these subject areas and companies in these industries is a critical one and should be occupied by careers services within universities. The difficulty that some companies face in recruiting qualified graduates for the types of roles in these industries is well known and the ability for international students to help fill this gap is similarly publicised. For career planning services within universities, it is vital that they provide an effective link between the two audiences to bridge the gap which currently exists.

What are the top three most important measures when thinking about graduate outcomes?

- A high graduate employment rate: 58%
- How soon students find employment after graduating: 52%
- A high rate of students going into their preferred industry: 47%
- A high student satisfaction score: 47%
- A high rate of students going into further study: 34%
- A high rate of students going to their preferred employer: 31%
- Other - please specify: 2%
- None of the above: 2%
What skills do they expect to leave university with?

In previous iterations of the survey, we have highlighted that upskilling is an important career consideration for prospective students when they come to decide on what they choose to study. It is also important to focus on what skills they want to leave university with, which they think will make them appear attractive to employers.

When asked this question, the skill sets perceived to be of the greatest value were problem solving, communication and leadership. These skills are indicative of the management-level roles and types of jobs within the professional services sector which so many prospective students aspire to. It is precisely these types of jobs where desired skill sets are most useful, both to graduates and to employers. It is important that universities take note of these and educate students on how their degree courses can equip them with these skills to help them in the careers they are pursuing. The way in which universities communicate with their students via their marketing communications should reflect the importance this audience places on finding the right career after they graduate. It is vital that career planning offices can add value by helping to guide current and prospective students in this regard and assist them in planning for their lives after graduation. The most effective way they can do this is to emphasise the skills their graduates gain from studying at the university and how these can help them when finding work.

The importance of careers services at universities and their ability to provide appropriate and knowledgeable assistance to students is paramount. There is currently a disparity between the expectations of employers for the skills that graduates gain during university compared to the skills that they have. When working in a large organisation, students tend to underestimate the importance of flexibility and teamwork and to overvalue the importance of leadership and creativity skills. There is a need for universities to identify the most valued graduate skills and effectively communicate these skills to their students.

Which of these skills would you expect a university to provide you with to help you become employable?

<table>
<thead>
<tr>
<th>Skill</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Problem solving skills</td>
<td>78%</td>
</tr>
<tr>
<td>Communication skills</td>
<td>71%</td>
</tr>
<tr>
<td>Leadership skills</td>
<td>71%</td>
</tr>
<tr>
<td>Technical skills</td>
<td>70%</td>
</tr>
<tr>
<td>Ability to work in a team</td>
<td>65%</td>
</tr>
<tr>
<td>Creativity</td>
<td>63%</td>
</tr>
<tr>
<td>Organisational skills</td>
<td>61%</td>
</tr>
<tr>
<td>Flexibility/adaptability</td>
<td>55%</td>
</tr>
<tr>
<td>Data skills</td>
<td>51%</td>
</tr>
<tr>
<td>Commercial awareness</td>
<td>41%</td>
</tr>
</tbody>
</table>
About QS

QS Quacquarelli Symonds is the world's leading provider of services, analytics, and insights to the global higher education sector. Our mission is to enable motivated people anywhere in the world to fulfil their potential through educational achievement, international mobility, and career development.

Our QS World University Rankings portfolio, inaugurated in 2004, has grown to become the world's most popular source of comparative data about university performance. Our flagship website, www.TopUniversities.com – the home of our rankings – was viewed 149 million times in 2019, and over 94,000 media clippings pertaining to, or mentioning, QS were published by media outlets across the world in 2019.

QS portfolio

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To continue empowering motivated individuals and institutions across the world alike during the coronavirus outbreak, QS’s response has included:

- Moving its student recruitment events online, ensuring that universities and talented potential applicants across the world are still able to achieve high-quality personalized engagement.
- Expanding its range of digital marketing offerings, empowering student recruitment teams as they seek to maintain outreach and enrolment efforts.
- Launching a webinar series designed to enable university faculty and administrators alike to share best practices as they transition their educational offerings into the virtual classroom.
- Ongoing surveys of prospective students and institutions globally to analyze how the COVID-19 crisis is impacting them.

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