Building A Sustainable International Strategy Using Student Intelligence and Data

International Student Survey 2016

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www.hobsonssolutions.com
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People often say that the world is ‘smaller than ever before’. But this doesn't always ring true. While one can certainly travel the world in a relatively small amount of time, it still takes time, patience and experience to understand different countries, cultures and perspectives.

The internationalisation of higher education has brought with it the opportunity for millions of students to better understand each other, both by attending university overseas, and by studying alongside students from all around the world.

In the 16 years that Hobsons has been involved in student recruitment, we have built up a significant amount of insight into the interests and behaviours of international students. The world is constantly changing, and that's why we regularly strive to enhance our understanding of international students through our annual International Student Survey.

This report covers more than the results of our survey. Here we also set out, in summary, our vision for the future of student recruitment.

Our work with universities now spans the entire student journey, from international strategy and execution to enquiry management, and from offer conversion to student engagement and retention. Data underpins everything that we do. We believe that the higher education sector can affect a step-change in international student recruitment by harnessing the power of data, student intelligence and predictive profiling, while taking advantage of new technologies and fields.

There are two fields in particular which we believe universities must focus on: data science and digital marketing. Innovation in these fields has resulted in paradigm shifts in other sectors. Now it is time for the power of data science and digital marketing to be brought to bear on international student recruitment. The higher education sector has the opportunity to create a new, strategic approach, more rooted in data and a true understanding of student needs.

Our approach recognises that, for universities in the UK, the market is tougher than ever before, and growth can no longer be depended on. The UK higher education sector has faced major challenges, but international students still represent a significant, strategic opportunity for UK universities. Now, more than ever, they need to be equipped with the tools, expertise and data to take advantage of this opportunity.

Working with our university partners, we are already starting to bring this vision to fruition. We will share what we've learned, on the journey so far, with presentations at NAFSA, UKCISA and at EAIE events.

We hope this report can act as a catalyst to start a dialogue about how the higher education sector can turn aspiration into action. We believe that by taking a more strategic approach to international student recruitment, a step-change can be achieved in the success of UK universities.
The Higher Education sector is going through a major period of change. In an increasingly globalised market, UK Universities are now competing for international students against Higher Education institutions all over the world. Competition is coming from countries such as the United States, Canada and Germany, which are upgrading their recruitment strategies while putting in place policies intended to facilitate the enrolment of international students. To remain competitive, universities in the UK must innovate. The old analogue approaches to international recruitment must be replaced with a new strategy, one which is personal, digital and sustainable.

It is critical that universities should move fast, as international recruitment is a strategic issue not just for our sector but for the UK as a whole. The UK is currently second only to the United States in terms of total international student numbers and, according to Universities UK, education exports are worth £8 billion to the UK economy, and are predicted to be worth almost £17 billion by 2025. As well as the positive economic impact, international students also enrich the UK academically, socially and culturally. At the University of Hull, we believe the benefit is not only in financial terms but also in the international reputation of the university.

To ensure that we continue to attract international students to the UK, universities must radically rethink how we approach international recruitment. Universities, like ours, cannot simply rely on targeting our international recruitment efforts, and resources, on a number of specific countries. Instead, we must harness the insights available on how international students make choices, interrogate the data and establish a strategy that fits the right international students with the right institution.

This report outlines the potential of student profiling to enable data-informed recruitment, a process that we are driving at the University of Hull. This approach is helping us to target our recruitment marketing on those students whose interests and aspirations match the first-class education and rewarding life experiences offered here. Whether it’s our leafy red-brick campus or our recently refurbished Brynmor Jones Library that attract students to the University of Hull, we want to target our resources on engaging with students who would enjoy being part of our community, wherever they are in the world. This requires a far more personalised and responsive approach, using global data, profiling, behavioural insights and a greater emphasis on digital communication.

Increasing global competition for international students can be viewed as an opportunity as well as a challenge. This is our chance to ensure UK universities diversify recruitment strategies to remain sustainable. This is our time to apply world-class innovation to a global challenge. This is our opportunity to radically rethink recruitment.
Scope

43,919 respondents globally
19,995 enquirers or applicants to UK universities
15 participating UK universities (7 post-1992, 2 Russell Group, 6 others)

59.6% prospective postgraduate students
36.3% prospective undergraduate students
4.0% other (including foundation and vocational)

211 nationalities
176 countries of residence
50.2% female*
47.4% male*
*2.4% not stated

63.1% under 24
29.8% 25-34
7.1% 35 and above
2,678 nationals
14.3%
38 countries in the Americas

3,421 nationals
18.3%
46 European countries

5,169 nationals
27.6%
50 African countries

7,442 nationals
39.8%
61 countries in Asia & Oceania

38.0%
first-generation higher education students

41.9%
annual household income below $25,000 (US Dollars)

15.3%
annual household income $25,000 – $75,000

9.9%
annual household income above $75,000
Executive Summary

International students make a vital contribution to higher education in the UK. Intellectually, they help connect UK campuses to the rest of the world, and put British universities at the heart of the global academic community. Economically, they contribute an estimated £8 billion to the British economy per year. Without the high level of international enrolment Britain has previously enjoyed – 18.9 per cent of all higher education students recruited in 2014 - the provision of world class higher education in the UK would not be sustainable.

The British government has a responsibility to support UK universities, through national policies which help them maintain a competitive edge and make the UK an attractive place for international students. Yet UK universities themselves must also act boldly in order to secure their futures as international institutions. One of the most critical deciding factors in a university’s international success is the strength of its recruitment strategy. In an increasingly competitive environment, without the bold development of these strategies, British universities risk being left behind.

In this #HobsonsInsights series we have outlined our vision for universities to develop and implement a truly sustainable approach to international student recruitment by:

- Adopting a ‘student first’ rather than a ‘market first’ approach to recruitment, focusing on understanding and attracting the right profile of students – wherever they are located;
- Diversifying the markets from which they recruit, both to take advantage of future growth potential from emerging markets, and to reduce dependency on – and exposure to risk from – major markets such as China, India and Nigeria, where demand has proven to be volatile;
- Being guided by data when making decisions about investment in international student recruitment;
- Underpinning the “right” international student marketing and recruitment strategy with technologies that support, efficiency, effectiveness, big data and personalization;
- Becoming truly customer-centric and engaging with prospective students on their terms, using the channels, content and communications they are comfortable and familiar with;
- Embracing the opportunities to use digital marketing to engage directly with students who would be a good match for your institution, wherever they are in the world;
- Being agile and responsive to change, constantly monitoring and adapting strategy to changing market conditions.
The UK’s decision to leave the EU has created widespread uncertainty in the Higher Education sector on issues ranging from the future of research funding to tuition fees. One area that might be most profoundly affected by Brexit is international student recruitment. Drawing on new survey data, this short analysis provides an international student perspective on what this impact might be.

Key findings include:

- 43 per cent of prospective international students feel that Brexit has affected their decision to study in the UK.
- Of these students, 83 per cent say it has made them less likely to study in the UK.
- However, 61 per cent suggested that the weaker Pound made UK Higher Education more attractive.

Method

This data is drawn from a survey conducted by Hobsons Solutions on the 14th and 15th of July 2016. Surveys were distributed to 23,805 prospective international students from both inside and outside the EU. All of those invited to complete the survey had enquired to one of a range of UK Universities within the last 12–18 months. Of these potential respondents, 1,014 answered the survey, a response rate of 4.2 per cent within a 24 hour period. 87% of respondents were from non-EU countries.

Brexit will influence the education choices of many international students

43 per cent of prospective students felt Britain’s decision to leave the EU had affected their decision on whether to study in the UK. A similar number, 44 per cent, suggested that Brexit had not influenced their study choice, while 14 per cent were already studying in the UK.

Has the UK’s decision to leave the EU affected your decision concerning whether or not to study in the UK?

- I am already studying in the UK: 13.7%
- It has made no difference to my decision: 43.6%
- It has somewhat affected my decision: 23.8%
- It has significantly affected my decision: 18.9%
Many international students are less likely to study in the UK due to Brexit

Of the respondents that said it had affected their decision to study in the UK, 83 per cent felt that Brexit made them less likely to study in the UK, while 17 per cent felt it made them more likely to study in the UK.

In what way has the UK’s decision to leave the EU affected your decision concerning whether or not to study in the UK?

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will now definitely study in the UK</td>
<td>5.6%</td>
</tr>
<tr>
<td>I am now more likely to study in the UK</td>
<td>11.5%</td>
</tr>
<tr>
<td>I am now less likely to study in the UK</td>
<td>69.5%</td>
</tr>
<tr>
<td>I will now definitely not study in the UK</td>
<td>13.4%</td>
</tr>
</tbody>
</table>

Only 13 per cent of respondents answered that they would now definitely not study in the UK, but 70 per cent of respondents said it made them less likely to study in the UK.

How Brexit makes the UK a less attractive Higher Education destination

Amongst those who felt that Brexit made it less likely that they would study in the UK, the most common reason was that the UK seemed less welcoming as a result of Brexit, a factor for 59 per cent of respondents. This response was reinforced by the comments collected within the survey, a number of which highlighted concerns of xenophobia:

“I’ve heard there’s been a spike in racism and xenophobia within the UK and I don’t want to support that in any form.”

“People have become so racist and with all the ongoing circumstances, I’d not feel safe there.”

The next three most significant factors were practical rather than attitudinal. 56 per cent felt it would be harder to get a visa, 50 per cent felt it would be harder to get a job after graduation, and 41 per cent felt it made the UK a less financially viable option. A further 41 per cent felt that the UK would be weaker outside of the EU, and 31 per cent would rather study in an EU university. Only 18 per cent felt it would reduce the quality of research or teaching, while 8 per cent supplied an additional reason for their reduced inclination to study in the UK.

Why has the decision to leave the EU made it less likely that you will study in the UK?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think the UK is less welcoming to international students like me</td>
<td>59.4%</td>
</tr>
<tr>
<td>I think it will be harder to get a visa</td>
<td>56.4%</td>
</tr>
<tr>
<td>I think it will be harder to get a job when I graduate</td>
<td>49.6%</td>
</tr>
<tr>
<td>It makes the UK a less financially viable option for study</td>
<td>41.2%</td>
</tr>
<tr>
<td>I think Britain will be weaker outside of the EU</td>
<td>40.6%</td>
</tr>
<tr>
<td>I’d rather study at a university within the EU</td>
<td>31.3%</td>
</tr>
<tr>
<td>I think it will reduce the quality of research and/or teaching</td>
<td>18.2%</td>
</tr>
<tr>
<td>Other - Write In (Required)</td>
<td>7.8%</td>
</tr>
</tbody>
</table>
How Brexit might make the UK a more attractive Higher Education destination for some

Amongst the relatively small percentage of respondents who felt that Brexit made it more likely that they would study in the UK, the most significant factor was again attitudinal rather than practical. 52 per cent felt that the UK had become more welcoming to international students like them. The second most common reason was distinctly practical - 43 per cent felt that the Pound becoming weaker against their home currency would make a UK degree less expensive. A further 37 per cent felt that the UK would be stronger outside the European Union, while 23 per cent felt that it would improve the quality of research and teaching, and 7 per cent felt it would lead to better employment prospects in the UK.

Why has the decision to leave the EU made it more likely that you will study in the UK?

- I think the UK is more welcoming to international students like me: 51.7%
- I think the Pound will be weaker against my home currency, making a UK degree less expensive: 43.3%
- I think Britain will be stronger outside the EU: 36.7%
- I think it will improve the quality of research and/or teaching: 23.3%
- I think more of British people as a result of the referendum: 8.3%
- I think there will be better employment prospects in the UK: 7.0%
- Other - Write In (Required): 6.7%
- I’d rather study in a university outside of the EU: 3.3%

Only 3 per cent actively preferred studying in a university outside of the EU, and 7 per cent submitted other answers.

Looking at more detail at this idea confirms that the weaker Pound is a strong attraction for international students. Asking all the survey respondents whether they thought a weaker Pound made the UK more attractive to them, 61 per cent answered that it did, of which 36 per cent felt it made the UK ‘much more attractive.’ 25 per cent felt it didn’t make a difference and 10 per cent felt it made the UK less attractive.

Do you think the weaker Pound makes the UK more attractive to international students like you?

- I don’t know: 3.8%
- I think it makes the UK much less attractive: 4.7%
- I think it makes the UK a little less attractive: 5.6%
- I think it doesn’t make a difference: 25.3%
- I think it makes the UK a little more attractive: 24.2%
- I think it makes the UK much more attractive: 36.4%
**Brexit’s possible impact on the UK’s competitors**

Presented with a list of 11 major alternative destinations, respondents were asked whether Brexit made them more or less likely to study in those countries.

Net change in the likelihood of studying in the following countries as a result of the referendum

<table>
<thead>
<tr>
<th>Country</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>32%</td>
</tr>
<tr>
<td>Germany</td>
<td>21%</td>
</tr>
<tr>
<td>Australia</td>
<td>20%</td>
</tr>
<tr>
<td>United States</td>
<td>20%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>11%</td>
</tr>
<tr>
<td>France</td>
<td>10%</td>
</tr>
<tr>
<td>Italy</td>
<td>7%</td>
</tr>
<tr>
<td>Japan</td>
<td>-2%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>-8%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>-8%</td>
</tr>
<tr>
<td>China</td>
<td>-11%</td>
</tr>
</tbody>
</table>

Perhaps unsurprisingly, Anglophone countries were amongst the greatest potential beneficiaries of Brexit. Canada saw a net gain of 32 per cent in terms of the balance between those less likely to study in Canada because of Brexit, and those more likely to study there. For the United States, this was 20 per cent, and for Australia this was also 20 per cent, with a net increase of 11 per cent for New Zealand. After Anglophone countries, key EU states were major beneficiaries. Germany saw a net increase of almost 21 per cent, France 10 per cent and Italy 7 per cent.

Interestingly, Brexit reduced the likelihood of respondents studying in a number of non-European, non-Anglophone states. China saw a 11 per cent net decrease, Malaysia saw an 8 per cent decrease, Hong Kong saw an 8 per cent decrease and Japan saw a 2 per cent decrease. While Brexit might increase the competitive strength of Anglophone countries, it might also present the UK with new opportunities.
How should UK universities respond to Brexit?

Respondents were asked the question ‘what could UK universities do that would make studying in the UK a more attractive prospect for you?’ The response took a free-text format, and there were 603 responses. Of these:

- 16 per cent mentioned scholarships (comments containing ‘scholarship’)
- 14 per cent mentioned post-study work visas (comments containing ‘visa’, ‘post-study work’ or ‘PSW’)
- 13 per cent mentioned lower tuition fees (comments containing ‘tuition’, ‘fees’ or ‘cost’)

Many prospective international students suggested that they would be more likely if some reassurance or explanation was provided with regards to some of the practical aspects of Brexit, such as the impact of exchange rate volatility, the impact of Brexit on interchange programmes, or just a general explanation of what Brexit entails. This need for reassurance was reflected in a number of student comments.

“It would be helpful if UK universities would explain to international students how leaving the EU will affect us.”

“If UK universities could consider the volatility of the exchange rate for international students when determining the cost of attendance, adding extra funds as a kind of safety net, or introducing a programme that allows for an increase at a later disbursement, or some similar idea, that would put my mind at ease.”

“Assure students that the fact they no longer belong to the EU doesn’t mean progress will not continue. Try to make admission easy for students coming in and assuring them that their stay throughout would be non-stressful.”

Conclusion

The results of this survey suggest that Brexit poses an immediate and serious challenge to the UK’s international student recruitment efforts. Prospective international students are now more reluctant to come to the UK to study, and the number who are more likely to come are outweighed by those who are less likely to come. Perceived xenophobia, and a desire for the benefits of being a student in an EU country, sit at the heart of this more negative consideration of the UK as a Higher Education destination.

However, Brexit has also presented opportunities. A weaker Pound means that UK Higher Education has in recent years rarely been cheaper for a foreign buyer. Highlighting this reduced cost could go some way to enticing certain groups of international students, although promoting the idea of the UK as a ‘low cost’ destination may be ill-advised from a brand perspective. On a practical level, there are a range of other ways that UK universities can reassure international students about Brexit, including providing advice and guidance on the impact of Brexit to prospective students, increasing scholarship funding, and using your existing international students as ambassadors to discuss their positive experiences of the UK being a safe and welcoming country.
Recommendations

Recommendation 1

Use profiling to understand your current students and view your target market in terms of ‘profiles’ as well as nationalities.

Student profiling has made it possible to understand prospective students in a deeper and more nuanced way than ever before. Universities must move away from grouping prospective students based only on nationality and embrace a ‘student first’ not ‘market first’ approach. This is a crucial step towards reducing dependence on ‘key’ markets and managing the risk that over-dependence on a small number of markets brings.

Recommendation 2

Focus on getting enquiries from the right type of students, not simply maximising enquiry numbers.

Marketing activities aimed at increasing enquiries from international students must focus on quality above quantity. This means making sure that resources are focused on engaging with those prospective students that are the ‘right fit’ for a university, and not simply on maximising enquiry numbers.

Recommendation 3

Be data-driven when making decisions about investment. Make informed decisions based on data, measure outcomes, and refine based on results.

Student recruitment is a science as well as an art. Universities must approach their recruitment efforts in a highly strategic and targeted manner, put in place effective mechanisms for tracking and reporting, and be driven by the data when making decisions about where to invest resources and effort. In a rapidly changing recruitment environment, relying on what has worked well in the past is no longer sufficient.

Recommendation 4

Underpin every element of your international student marketing and recruitment strategy with technologies that support efficiency, effectiveness, big data and personalisation.

Universities must move beyond simply collecting data and operationalise the valuable insights that this data contains. This entails moving beyond purely quantitative types of data, such as nationality, age, or gender, and capturing qualitative data on preferences, decision making, and the individual circumstances of each prospective student. This data must then be leveraged to provide better and more personalised services to prospective students.
Recommendation 5

Be truly customer-centric and engage with prospective students on their terms, using the channels, content and communications they are comfortable and familiar with. Be responsive, personal, and helpful.

As part of a ‘student first’ approach, universities must keep pace with changing expectations around communications, and engage with prospective students through the channels that they find most convenient. Communications between prospective students and a university should not be viewed in transactional terms, but should form a true dialogue. Newer platforms including social messaging and live online chat should be utilised to enable closer and more personal communications with prospective students.

Recommendation 6

Embrace the opportunity to use digital marketing to engage directly with students who would be a good match for your institution, wherever they are in the world.

Universities must embrace the potential that digital marketing offers for directly engaging with prospective students; through online advertising, re-marketing, and other measureable and targeted marketing techniques. Such an approach enables targeting of specific student types, wherever they are in the world, rather than broad based marketing based on nationalities. Measurement and return on investment are the lynchpins of a successful digital marketing strategy; universities must match the progress being made in the commercial sector.

Recommendation 7

Be agile and responsive to change. Constantly review your strategy and adapt it to changing market conditions or student expectations.

All universities operate in an unpredictable and volatile market, and a truly sustainable international strategy must recognise the certainty that plans will sometimes need to change. To stay ahead of the curve, universities must react quickly and in an agile manner to emerging threats and opportunities.
The ‘analogue’ approach to international recruitment is no longer fit for purpose

Currently, universities in the UK tend to approach their international student recruitment efforts on a national basis, seeking to attract students from major markets like China, India or Nigeria. Along with universities from across the world, UK universities often concentrate their efforts on a handful of the very largest markets. This method of recruiting international students is both blunt and unsustainable. What’s more, relying on a handful of national markets introduces a range of vulnerabilities for higher education institutions.

For example, the UK government’s scrapping of the Post-Study Work Visa in 2012 has sharply reduced the number of Indian international students studying at UK Universities. While in 2010 39,090 Indian students arrived to study in UK Universities, last year that number had declined by around 74 per cent. The number of students from Pakistan coming to the UK similarly dropped markedly in 2012, as compulsory interviews were introduced in an effort to tackle ‘bogus students.’ Between 2010 and 2012, the number of international students from Pakistan dropped by 38 per cent.

Policy changes in other countries can just as easily have significant, rapid effects on the flow of international students to UK universities. New foreign currency exchange controls introduced in Nigeria contributed to a minor reduction in the number of Nigerian students coming to the UK in 2014, with a larger decrease likely in 2016 as the full effect of the policy is felt.

Competition from other countries can also reduce UK international student numbers. Chinese students make up the single largest group of international students coming to the UK – 89,540 in 2014/2015. Yet while the number of students from China continues to rise, that growth is slowing markedly, not least in the face of growing competition from Germany. Germany’s rising number of well ranked universities are increasingly offering courses in English, and Chinese students make up more and more of the German student body.

Each of these major markets have experienced legislative or economic changes which have impacted negatively on the number of students coming to the UK, demonstrating dramatically why universities can no longer afford to concentrate their recruiting efforts within a handful of countries.

The recruiting strategies currently exploited by UK Universities do not lend them the competitive edge they need. Not only do they concentrate risk in a few countries, but they entail significant fixed costs: country managers, local offices, fairs and events. The administrative cost of having a presence in more than a handful of countries is too large for many, or even most universities to consider, and makes scaling recruiting efforts across new markets difficult. Even if there was sufficient money to scale existing approaches, the returns wouldn’t justify the expense.

UK universities, therefore, face a two-pronged challenge. They need to diversify their intake of international students in order to reduce risk, and they need to rise to the challenge of increased competition with foreign universities. In the context of pressure on university recruiting budgets, we believe a change in approach – and in the mind-set of recruiters – is required. This approach needs to take into account individual institutions risk thresholds for certain markets, as with an increase in diversity comes an increase in enquiries and applications from markets institutions may have less experience in enrolling, managing the visa process and navigating immigration policy. This may increase emphasis on partnership models and on providing more guidance and due diligence in the application process.

Section 1 - Identify
Developing a new approach to recruiting – personal, digital, sustainable

The rapid development of digital technology in recent years has made sophisticated data analysis and personalised marketing, particularly through social media, more practical and less expensive than ever before.

Potential international students around the world are more accessible than they have ever been, and can be engaged in more intelligent ways. Universities no longer have to ask ‘what are the best new markets for us?’ Instead, they can consider ‘who are the right students for us?’

A student-focused approach, supported by new technological capacities, is the key to the development of a sustainable, affordable recruitment strategy. Such a strategy, freed from vast fixed costs and an inflexible dependence on static markets, would be:

- More targeted, than existing methods, capable of deploying resources where they might have the greatest impact: not on the national level, but on the level of individual students.
- More agile, able to pivot and refocus in response to shifting markets and changes in the international landscape.
- More measurable, with sophisticated individual-level data making a detailed understanding of ‘cost per acquisition’ and ‘return on investment’ possible.
- More personalised, with offers and approaches tailored to individual students and their needs, not national profiles.

Whether or not you believe that students should be perceived as ‘consumers’, every university’s recruitment strategy needs to put the student at its centre. There are many who would argue that student recruitment is an art as much as a science, that decision making is complex and that there is no simple formula for success. However, we believe that this more data-driven approach to the recruitment of international students could be transformative for UK universities. The first practical step towards this is student profiling.

The first step: student profiling

In simple terms, student profiling is about identifying the requirements, ambitions and desires of potential students, and classifying them according to those needs. Through data sources such as the International Student Survey (ISS), numerous data profiles can be developed to construct a richer, more nuanced way of grouping prospective students than their nationality.

Building on the previous three years of the ISS, we have identified a series of core factors that prospective international students consider when making decisions about which higher education institution to study with. These relate to a number of areas focused on the outcome a student is looking for from their study and the experience they wish to have, amongst other factors.
Through our analysis of more than twenty variables drawn from the ISS, sophisticated scoring mechanisms can be created which rate the importance of factors for every surveyed international student.

Each student’s score is calculated through the analysis of their responses to a broad range of questions. Importantly, the question utilises both direct and indirect questioning methods, to gain the most accurate understanding of the true underlying preferences of each student. Elements of the scoring methodology are weighted to reflect the fact that certain question types are known to be more ‘telling’, and hence contribute a larger amount to the resulting score. Through sophisticated analysis, we can draw together clusters of data and create a range of student profiles based on common priorities and student characteristics. The use of ‘machine learning’ in the creation of these profiles mean that they follow mathematically defined patterns within the data, rather than any preconceived categorisation. The profiles we have created are the most accurate categorisation of student’s considerations in their higher education decision making to date.

An illustrative example of an early iteration of the clustering approach is shown below.

An anonymised illustrative example of an individual profile is shown below. The profile defines the student’s sensitivity towards each of the components of choice that influence their decision making.
We are then able to map back the profiles to the responses given to different areas of the survey to build a rich and detailed picture of the background, habits, and preferences of each profile of student.

An illustrative example of the type of rich information such a profile provides is shown below:

![](image)

This level of sophistication in profiling can ensure institutions are attracting the students that are the right fit for their university. This can be achieved by augmenting this profiling data with an institution’s existing data resources on students, prospects and alumni.

Furthermore, by taking into consideration local factors relevant to an individual university, such as their value proposition and differentiators, these profiles can be richly customised at an institutional level.

By adopting this methodical and scientific approach to profiling, segmentation and individual targeting, institutions are able to map new populations of students online across the social channels where they are present, and seed with relevant content to help them research options, make decisions, and manage objections with regard to their decision to study internationally.

**The second step: data-informed recruitment**

These detailed profiles can profoundly augment recruiting efforts in a number of important ways.

They can allow universities to better understand their students. By comparing their current student body against the profiles we have developed, a university can more effectively recognise what types of students they will most likely be able to recruit. They can also help universities understand where to find those students who are most likely to be interested in attending their institution. Rather than making assumptions about which markets ‘might’ be the most valuable, universities can now make informed, data-driven decisions.

Most powerfully, this kind of sophisticated profiling is far more accurate and intelligent than crude grouping by nationality. With a greater understanding of a student’s priorities and concerns, universities can engage them much more effectively. Moreover, as the next section will demonstrate, innovations in digital marketing mean that it is now possible – and necessary – to reach beyond nationally based recruiting efforts. This kind of profiling combined with new marketing approaches could revolutionise the recruitment of international students.
Section 2 - Engage

Turning data-driven identification into personalised engagement

Identifying which international students might be the most interested in a university is important, but it is only the first part of the recruiting process. From using profiling to approach the right students through the right mediums with the right messages, to reaching them through new social media channels, digital innovation could significantly strengthen the international recruiting efforts of UK universities. What’s more, increasingly personalised, technologically facilitated resources are what international students expect.

Traditionally, universities have approached student recruiting in a ‘one size fits all’ manner, with a limited range of analogue tools – prospectives, open days, radio advertisement and so on – which cast the university as the ‘disseminator’ and the student as the ‘recipient’ of information.

With the advent of the digital age, the mass adoption of increasingly sophisticated information technology, and the explosion of social media, this dynamic has been transformed. Students are now more in control of the process of gathering information on, comparing and choosing between universities than ever before.

Universities need to be able to cut through this digital noise, communicating with their target markets through their preferred media and with messaging that addresses their needs and priorities. To do this, universities need to understand each stage of an international student’s effort to find the right university for them, and to identify the key opportunities they have to influence and support them. The first step is to understand where international students go for the information they use to make their higher education choices.

How do you find the following information?

<table>
<thead>
<tr>
<th>Cost of living</th>
<th>Advertisement</th>
<th>Event/open day</th>
<th>Family and friends</th>
<th>Other websites</th>
<th>Through an agent</th>
<th>University booklets/brochures</th>
<th>University website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of living</td>
<td>491</td>
<td>527</td>
<td>1844</td>
<td>2435</td>
<td>831</td>
<td>1286</td>
<td>6580</td>
</tr>
<tr>
<td>Cost of living</td>
<td>258</td>
<td>294</td>
<td>240</td>
<td>508</td>
<td>1495</td>
<td>10778</td>
<td>7896</td>
</tr>
<tr>
<td>Cost of living</td>
<td>221</td>
<td>534</td>
<td>210</td>
<td>255</td>
<td>378</td>
<td>1614</td>
<td>10727</td>
</tr>
<tr>
<td>Location of university</td>
<td>335</td>
<td>547</td>
<td>659</td>
<td>2689</td>
<td>453</td>
<td>1280</td>
<td>7896</td>
</tr>
<tr>
<td>Location of university</td>
<td>328</td>
<td>468</td>
<td>473</td>
<td>1576</td>
<td>389</td>
<td>978</td>
<td>9702</td>
</tr>
<tr>
<td>Scholarship</td>
<td>640</td>
<td>532</td>
<td>357</td>
<td>1798</td>
<td>770</td>
<td>883</td>
<td>8926</td>
</tr>
<tr>
<td>Travel and accommodation</td>
<td>456</td>
<td>476</td>
<td>1118</td>
<td>3218</td>
<td>1270</td>
<td>932</td>
<td>6435</td>
</tr>
<tr>
<td>University rankings/ratings</td>
<td>430</td>
<td>238</td>
<td>241</td>
<td>8401</td>
<td>388</td>
<td>623</td>
<td>3598</td>
</tr>
<tr>
<td>Visa requirement</td>
<td>261</td>
<td>338</td>
<td>696</td>
<td>4213</td>
<td>2296</td>
<td>508</td>
<td>5573</td>
</tr>
</tbody>
</table>
### Identifying the right media

The latest ISS sheds some light on what sources of information prospective international students exploit. Across all aspects of information gathering apart from university rankings, the most common source is a university website.

Even where other sources of information score highly, university websites are still the most important source. Comparatively, more traditional resources – events and open days, and even university booklets and brochures – are used by a far smaller number of students across the board. This is particularly understandable in the case of international students, for whom non-digital sources of information are associated with more significant geographic barriers.

The ISS also reveals that there are three types of information that more than any other draw prospective university students to a university website:

- course information
- guidance on entry requirements
- information about how to apply

However, this does not mean that international students expect to use university websites simply as a source of basic information.

<table>
<thead>
<tr>
<th>What are you most likely to look for on a university website?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course information</td>
</tr>
<tr>
<td>Entry requirements</td>
</tr>
<tr>
<td>How to apply</td>
</tr>
<tr>
<td>How to enquiry</td>
</tr>
<tr>
<td>Scholarship information</td>
</tr>
<tr>
<td>Career outcomes</td>
</tr>
<tr>
<td>Accommodation information</td>
</tr>
<tr>
<td>Contact details</td>
</tr>
<tr>
<td>Institution rankings</td>
</tr>
<tr>
<td>Subject rankings</td>
</tr>
<tr>
<td>Information on local city/town features</td>
</tr>
<tr>
<td>English language training services</td>
</tr>
<tr>
<td>Information on the country</td>
</tr>
<tr>
<td>Visa information</td>
</tr>
<tr>
<td>Information on local city/town safety</td>
</tr>
<tr>
<td>University news</td>
</tr>
<tr>
<td>Information for your parents/family</td>
</tr>
<tr>
<td>Stories/blogs from other international students</td>
</tr>
<tr>
<td>Links to social media</td>
</tr>
<tr>
<td>Local agents</td>
</tr>
</tbody>
</table>

![Average score (max = 20)](chart.png)
The expectations of international students concerning what makes a ‘good’ website are constantly being raised. Year on year, new digital technologies make it easier for universities to produce increasingly sophisticated websites, while simultaneously making them more accessible for the user. Three basic website functionalities – a course search function, an online application feature and a dedicated section for international students – are vital, with between 86 and 81 per cent of international students regarding them as important.

But beyond these simple functions, prospective students have a host of other requirements. Over 72 per cent of students rated mobile functionality as an important requirement – indeed this year, 50 per cent of students completed the ISS itself on a mobile device. Moreover, in excess of half of all international students reported that location-based personalisation was important, and 60 per cent wanted access to a virtual campus tour.

Critically, websites need to direct prospective students quickly and efficiently to key items of information. Indeed, 40 per cent of Europeans suggest that they would typically spend less than 10 minutes on a university’s website before moving on. Yet simplicity alone is not sufficient. University websites benefit from rich, detailed content, with over 47 per cent of prospective students willing to spend in excess of 15 minutes on a university website. Intuitive site sign-posting, therefore, is critical.

How important is the following functionality to improve your experience of using an institution’s website?

<table>
<thead>
<tr>
<th>Function</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>A dedicated section of the website for international students</td>
<td>5.20%</td>
<td>3.60%</td>
<td>10.10%</td>
<td>23.20%</td>
<td>57.90%</td>
</tr>
<tr>
<td>Course search</td>
<td>5.10%</td>
<td>2.30%</td>
<td>6.30%</td>
<td>20.90%</td>
<td>65.50%</td>
</tr>
<tr>
<td>Enquiry forms</td>
<td>5.10%</td>
<td>5.10%</td>
<td>18.10%</td>
<td>31.60%</td>
<td>40.10%</td>
</tr>
<tr>
<td>Website works well on a tablet or mobile phone</td>
<td>6.10%</td>
<td>5.90%</td>
<td>15.80%</td>
<td>23.70%</td>
<td>48.60%</td>
</tr>
<tr>
<td>Online chart</td>
<td>8.00%</td>
<td>12.40%</td>
<td>25.20%</td>
<td>25.20%</td>
<td>29.20%</td>
</tr>
<tr>
<td>Ability to specify your location to personalise website content</td>
<td>7.70%</td>
<td>11.30%</td>
<td>27.90%</td>
<td>27.60%</td>
<td>25.40%</td>
</tr>
<tr>
<td>Online application</td>
<td>5.40%</td>
<td>2.50%</td>
<td>7.20%</td>
<td>18.80%</td>
<td>66.10%</td>
</tr>
<tr>
<td>Virtual campus tours</td>
<td>5.50%</td>
<td>8.90%</td>
<td>25.10%</td>
<td>29.60%</td>
<td>30.90%</td>
</tr>
<tr>
<td>Videos</td>
<td>6.30%</td>
<td>12.00%</td>
<td>30.60%</td>
<td>27.10%</td>
<td>24.10%</td>
</tr>
<tr>
<td>Prospectus download</td>
<td>5.00%</td>
<td>6.40%</td>
<td>21.30%</td>
<td>28.80%</td>
<td>38.50%</td>
</tr>
<tr>
<td>Request for someone to call you</td>
<td>8.30%</td>
<td>13.00%</td>
<td>30.60%</td>
<td>25.10%</td>
<td>23.00%</td>
</tr>
</tbody>
</table>
Engaging through the right channels – phone calls, emails and beyond

These raised expectations regarding websites, characterised by a demand for technological sophistication, are mirrored by high expectations of what level of personalisation universities should provide in their communication with prospective students.

International students have firm preferences concerning how universities communicate with them. Across all the profiles we developed, 81 per cent ranked email as their first preference, and 31 per cent ranked a phone call as their second preference.

Interestingly, the desire for a phone call option was markedly higher in some regions than others, presenting a potential opportunity for the customisation of services based on location. For example, 60 per cent of African students listed a phone call as their first or second most preferred method of communication, compared to just 34 per cent of European students. There is also significant variance between nations, with 59 per cent of Indian students desiring a phone call option compared to only 38 per cent of Chinese students.

One particularly clear example of the changing expectations of international students is that 48 per cent of prospective students want to be able to request a phone call from a university if they can’t find the information they desire. No longer is a ‘contact us’ page sufficient; students increasingly want a ‘contact me’ option.

What forms of communication would you most like to receive from a university you have made an enquiry or application to?

<table>
<thead>
<tr>
<th>Communication Method</th>
<th>First choice</th>
<th>Second choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>43.1%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Phone</td>
<td>5.3%</td>
<td>25.8%</td>
</tr>
<tr>
<td>Letter (direct mail)</td>
<td>4.5%</td>
<td>21.2%</td>
</tr>
<tr>
<td>SMS text message</td>
<td>4.6%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Social messaging platforms (e.g. WhatsApp, Viber)</td>
<td>9.1%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Facebook</td>
<td>4.5%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Twitter</td>
<td>0.7%</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

How long would you spend on a university website looking for information before going elsewhere?
This desire for increasingly proactive and personal communication from universities is also reflected in the level of interest in the provision of ‘live chat’ capabilities. According to recent research, customers using ‘live chat’ – applications that allow real-time discussions between public individuals and members of staff – report higher levels of satisfaction than customers using any other service channel. These high levels of customer satisfaction have driven many leading companies, for example Amazon, to adopt the service. A very small number of universities, including the acclaimed Minerva College in the USA, have also begun to embrace live chat functionality. However, the vast majority of universities offer no such service.

Those universities that make the step to live chat first will have the opportunity to distinguish themselves from the competition. In fact, nearly 88 per cent of international students would be interested in using a real-time messaging capability to communicate with universities.
International students today demand sophisticated and clearly presented websites as a minimum. But a university’s website is only one element of its online offer.

**Targeting the right social networks**

Social media is critical to the way in which international students engage with their potential universities choices at every stage. More than 40 per cent of international students use social media to locate the information they need before making an enquiry, while only around a third of students didn’t take advantage of social media in some way. A university’s social media strategy should offer not only another source of information for a prospective student, but a vital opportunity for universities to access the student profiles they want.

Social media marketing has in recent years revolutionised the way that services can be advertised, allowing more narrowly targeted and cost effective marketing efforts than ever before. Today, direct communication through social messaging apps offers a potentially significant new way to communicate with prospective students.

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Would you be interested to using real-time messaging/online chat to interact with a university you are considering?

- 12.3% no
- 87.7% yes

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When did you use social media as part of the research process when deciding where to study?
Social messaging – smaller group, peer-to-peer communications in a more private setting – is an area of social media that has grown markedly in recent years. We asked what social messaging channels international students were using, and how often. Almost 72 per cent of students used WhatsApp at least daily, and 56 per cent used Facebook messenger at least daily. The significant potential for universities to start using these channels to communicate directly with prospective students is clear.

At the same time, this more direct social media communication is a clear example of an area where the personalisation of recruitment is critical. For instance, in China, WeChat is the most popular social messaging app, used by 97 per cent of students at least daily while only 18 percent use WhatsApp. Conversely, in Hong Kong or Nigeria, 94 per cent of students use WhatsApp at least daily. In the United States, 70 per cent of students use Snapchat, the most popular social messaging app amongst this group, at least daily.

Top three social messaging channels based on daily usage
Communicating at the right time – the importance of a rapid response

Previous ISS results have consistently shown that prospective students value responsiveness. In 2014 we found cases where students, faced with a choice between two universities, chose the one that responded to them most rapidly. What's more, our research has found that this is not because students are impatient. It is because, from their perspective, the rapidity of a response acts as a proxy for the quality of a university.

If responsiveness is important to students, then it is vital to understand what might typically be regarded as ‘responsive.’ We have found that more than half of students – 52 per cent – desire a response within 24 hours after they make an enquiry, and only 15 per cent would be satisfied with a response taking longer than three days.

Simply put, universities that fail to meet these response time expectations risk missing out on potential students.

How quickly would you like to receive a response from a university at the following stages?

<table>
<thead>
<tr>
<th>Stages</th>
<th>Within 24 hours</th>
<th>Within 3 days</th>
<th>Within 1 week</th>
<th>Within 1 month</th>
</tr>
</thead>
<tbody>
<tr>
<td>After I make an enquiry</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>After I apply</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>After I receive an offer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>After I have started studying</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

More than 63 per cent of students said that if the university responds quickly to my enquiry/emails, that had an impact on their perception of that institution's teaching quality.

What factors do you think indicate that a university provides good teaching quality?

<table>
<thead>
<tr>
<th>Factor</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>The university is ranked well overall in independent rankings</td>
<td>5.50%</td>
<td>5.10%</td>
<td>17.20%</td>
<td>33.00%</td>
<td>39.20%</td>
</tr>
<tr>
<td>Teaching staff are highly qualified</td>
<td>7.10%</td>
<td>2.20%</td>
<td>5.50%</td>
<td>18.40%</td>
<td>66.80%</td>
</tr>
<tr>
<td>High volume of face-to-face teaching hours</td>
<td>5.60%</td>
<td>5.70%</td>
<td>18.90%</td>
<td>30.70%</td>
<td>39.10%</td>
</tr>
<tr>
<td>Up-to-date technology and good online learning options</td>
<td>5.80%</td>
<td>5.10%</td>
<td>14.70%</td>
<td>29.30%</td>
<td>42.10%</td>
</tr>
<tr>
<td>A high graduate employment rate</td>
<td>5.90%</td>
<td>4.70%</td>
<td>14.80%</td>
<td>30.40%</td>
<td>44.20%</td>
</tr>
<tr>
<td>High graduate starting salaries</td>
<td>6.20%</td>
<td>8.90%</td>
<td>29.00%</td>
<td>31.20%</td>
<td>24.80%</td>
</tr>
<tr>
<td>The university has modern lecture theatres and facilities</td>
<td>5.90%</td>
<td>6.50%</td>
<td>20.80%</td>
<td>30.60%</td>
<td>36.20%</td>
</tr>
<tr>
<td>The university organises work placements as part of its courses</td>
<td>6.00%</td>
<td>5.20%</td>
<td>15.60%</td>
<td>30.70%</td>
<td>42.60%</td>
</tr>
<tr>
<td>The university responds quickly to my enquiry/emails</td>
<td>6.80%</td>
<td>8.30%</td>
<td>21.80%</td>
<td>28.20%</td>
<td>35.00%</td>
</tr>
</tbody>
</table>
Delivering what international students expect: data-driven, personal engagement

This section has presented some important examples of changing student expectations and the need for profiling and personalisation.

It has never been so important for universities to understand how a prospective international student decides on a higher education institution – particularly in terms of the digital resources and pathways they exploit. International students today demand an unprecedented degree of efficiency and personalisation in the online aspects of their interaction with universities. Students expect direct communication, and for greatest effect that communication needs to be personalised and rapid, based not only on their region or country, but on their individual profile. What's more, in the face of increased competition, UK universities need to be prepared to make radical advances in how they communicate with prospective international students.

The recipe for a sustainable international strategy is to get the right message to the right student through the right channel at the right time. The next section will examine what constitutes the ‘right message’, and explores how data-driven profiling can inform effective messaging and marketing to international students.
Understanding and exceeding student expectations

University has become a mass participation phenomenon. Twenty years ago there were only four countries in which more than half of student-age population attended university. Today, that number has grown to 54. This worldwide expansion in university education has been accompanied by a diversification in the reasons that people attend university, and an even greater broadening in what potential students look for in a higher education institution.

As this report has shown, universities navigating this more complex landscape need to ensure that they are targeting the right students specifically for their institution. No amount of persuasive prowess can compensate for a university offering something that a student does not want.

No university is brilliant at everything. Yet most universities are brilliant at something. Sometimes, understanding what those things are involves significant institutional self-awareness and perhaps a degree of self-criticism. An honest appreciation of what a university’s unique selling point is remains critical to an informed recruiting strategy. A truly competitive international recruitment strategy needs to identify both the unique offer of a university, and the unique range of factors that have led a student to the point of making an enquiry or an application to your university – or which make them the perfect target for a recruiting effort.

It also needs to recognise that the process of applying for university can be bewildering for students. The higher education market is bigger and more complex than ever before, particularly for international students. The wealth of information available to students comes with greater difficulties associated with navigation and decision-making – another reason why increasingly, engagement efforts need to be targeted and personalised. Universities able to effectively engage with the students that are the right match for their institution will ultimately have the competitive edge.

A university seeking to convert a potential international student needs first to understand what types of student are most likely to be right for their particular institution, and what their decision making process is. Second, they need to be able to clearly articulate why this student should choose their institution. Third they need to make that student’s decision making process easier, through useful, targeted information.
Why are they going to university?

Going to university is, of course, principally about gaining knowledge and enhancing employability. Yet a wide array of other factors come into the decision making process, and these vary within the different student profiles. We asked students to rank six reasons for going to university by importance, with a score of one indicating the most important factor, six the least important.

‘Continue my learning and development’ and ‘Improve my employment prospects’ ranked as the most important factors, while ‘Determine what to do with the rest of my life’, ‘Meet new people from different countries’ and ‘Make more money in my career’ achieved middling scores. Perhaps surprisingly, ‘Experience university life’ ranked lowest.

There were some regional trends in this prioritisation. For example, students from Asia ranked ‘Improve my employment prospects’ lower than other regions, and were the most likely to value the factor ‘Experience university life’ highly.
Trends can also be observed across income brackets. For example, the value students place on ‘Meeting new people from different countries’ as a reason for going to university decreases as average income rises, from an average rank of 3.8 for those with income below $50,000 US Dollars to 4.1 for those with income above $100,000 US Dollars. Counterintuitively, ‘Make more money in my career’ is a less significant factor for poorer students than richer ones.

These variations between income groups – where differences are often more pronounced than those observable between regions – demonstrate clearly the value of a recruiting effort that reaches beyond national boundaries. A more targeted approach, which approaches the motivations of each individual student, can be further improved through experience. Asking the right questions during initial contact, for example asking why individual students are considering going to university and recording responses in a structured way, can help inform communications strategies.

The ISS further asked students to consider 8 statements related to their motivations for going to university. Two statements garnered considerably high levels of agreement: 89 per cent of students agreed with the statement “I chose what to study mainly based on my personal interest” while 81 per cent agreed that “university is the best way to prepare for my career”.

Interestingly, a quarter of students agreed with the statement “I would consider not attending university if there was a better way of getting a qualification”, while a further 24 per cent were unsure. The significance of this should not be overlooked, particularly considering the relatively low premium generally placed on the experience of university life. Current alternatives to university, such as online short courses, are not yet popular. Only 15 per cent felt online short courses would be a good alternative to a university degree. Yet universities simply do not have an unquestionable position within the education system. If alternatives were available, a significant number of students would consider them.

Another challenge to the UK’s stake in the international student market was highlighted by the responses to the statement ‘I would prefer to study in my home country if the quality of education was similar’, with 42 per cent of international students agreeing. The longer-term potential for disruption in the higher education landscape in the UK, as the quality of teaching improves in countries that have traditionally sent large numbers of students overseas and as alternatives to university become more viable, is profound.
Do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Disagree</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>I choose what to study mainly based on my personal interest</td>
<td>88.58%</td>
<td>6.90%</td>
<td>4.42%</td>
</tr>
<tr>
<td>University is the best way to prepare for my career</td>
<td>80.52%</td>
<td>13.36%</td>
<td>6.12%</td>
</tr>
<tr>
<td>I would consider not attending university if the cost was too high</td>
<td>42.46%</td>
<td>25.15%</td>
<td>32.39%</td>
</tr>
<tr>
<td>I choose what to study based on areas where there is high demand for employees</td>
<td>40.75%</td>
<td>23.17%</td>
<td>36.07%</td>
</tr>
<tr>
<td>I would prefer to study in my home country if the quality of education was similar</td>
<td>41.64%</td>
<td>24.35%</td>
<td>34.02%</td>
</tr>
<tr>
<td>I chose a subject to study primarily based on how much I am likely to earn in that industry</td>
<td>38.19%</td>
<td>22.48%</td>
<td>39.32%</td>
</tr>
<tr>
<td>I would consider not attending university if there was a better way of getting a qualification</td>
<td>25.36%</td>
<td>24.58%</td>
<td>50.06%</td>
</tr>
<tr>
<td>An online short course is a good alternative to a university degree</td>
<td>15.46%</td>
<td>23.75%</td>
<td>60.79%</td>
</tr>
</tbody>
</table>

When are they making their choices?

This year’s survey found that more than 50 per cent of prospective students decide to go to university before they reached the age of 16, confirming our finding from last year. The survey also found significant differences between students in the Asia Pacific region, and those from Europe, the Middle East and Africa, with Asian students significantly more likely to decide on a university education in their late teens or beyond.

At what age did you first decide you wanted to go to university?
The potential for universities to start to shape these considerations at a number of junctures, approaching higher education processes as multi-staged rather than single events, is clear.

**What might hold them back?**

When it comes to the offer universities present potential students with, understanding where students want to go after university is just as important as understanding where they are coming from.

We found that 43 per cent of international students plan to work immediately after graduating, while the same percentage plan to go on to postgraduate study. Given recent changes in UK policy restricting the ability of international students to work in the UK after study, it’s critical that UK universities are creative in their efforts to support students seeking to enter the workplace. Work placements, work experience and establishing links with employers in student’s home countries are all ways to ensure the UK remains a viable destination for employment-minded students.

**What do you plan to do after graduating?**
It’s not just the feasibility of post-study work in the UK that might hold international students back. A wide range of factors represent potential worries for students looking to study in a foreign country, and these vary significantly between different groups of students.

What worries you about studying in a different country? (1=Not at all worried, 5=Very worried)

<table>
<thead>
<tr>
<th>Factor</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of course fees</td>
<td>5.15%</td>
<td>3.90%</td>
<td>11.94%</td>
<td>20.94%</td>
<td>58.08%</td>
</tr>
<tr>
<td>Cost of living</td>
<td>4.64%</td>
<td>3.87%</td>
<td>12.38%</td>
<td>25.26%</td>
<td>53.85%</td>
</tr>
<tr>
<td>Availability of scholarships</td>
<td>7.32%</td>
<td>6.51%</td>
<td>16.12%</td>
<td>20.55%</td>
<td>49.50%</td>
</tr>
<tr>
<td>Safety of destination country</td>
<td>12.14%</td>
<td>10.22%</td>
<td>19.34%</td>
<td>24.78%</td>
<td>33.51%</td>
</tr>
<tr>
<td>I will miss my home, family and friends</td>
<td>18.71%</td>
<td>22.50%</td>
<td>28.87%</td>
<td>16.53%</td>
<td>13.39%</td>
</tr>
<tr>
<td>Food choices</td>
<td>27.09%</td>
<td>20.71%</td>
<td>27.28%</td>
<td>15.04%</td>
<td>9.87%</td>
</tr>
<tr>
<td>Climate</td>
<td>24.63%</td>
<td>21.34%</td>
<td>29.64%</td>
<td>15.92%</td>
<td>8.47%</td>
</tr>
<tr>
<td>Cultural differences</td>
<td>28.94%</td>
<td>22.46%</td>
<td>26.69%</td>
<td>13.96%</td>
<td>7.95%</td>
</tr>
</tbody>
</table>

Some of these variations are obvious. Students from the wealthiest backgrounds are significantly less concerned with the cost of living than those from the poorest, with a 23 percentage point difference.

What worries you about studying in a different country? Cost of living by household income (1=Not at all worried, 5=Very worried)

<table>
<thead>
<tr>
<th>Income Range</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $25,000</td>
<td>4.35%</td>
<td>3.26%</td>
<td>10.56%</td>
<td>23.61%</td>
<td>58.22%</td>
</tr>
<tr>
<td>$50,001–$100,000</td>
<td>4.86%</td>
<td>4.63%</td>
<td>15.76%</td>
<td>28.95%</td>
<td>45.81%</td>
</tr>
<tr>
<td>More than $100,000</td>
<td>7.72%</td>
<td>7.64%</td>
<td>19.60%</td>
<td>29.81%</td>
<td>34.93%</td>
</tr>
</tbody>
</table>

Other factors vary on a regional level. For example, only 20 per cent of African students regard food choices as an important consideration, while amongst Asian students, 29 per cent regard it as important.

What worries you about studying in a different country? Food choices by region (1=Not at all worried, 5=Very worried)
International students are not just choosing a university, but a place they want to spend years of their life. Cost of living, the quality of public transport and crime rates are the most important factors influencing these location-related decisions by some distance. Notably, they are far more important factors than the culture and history of an area, which concern less than half of all international students – another indication that UK universities cannot rest on their laurels when it comes to the UK’s legacies.

When choosing the town or city you want to study in, what factors are most important to you? Percentage rating factor as important.
Who else influences their choices?

No-one makes decisions in a vacuum, and international students, making complex, expensive and life-changing decisions commonly draw on a wide range of social and professional supports to inform their decisions.

We asked international students to rank six influencers in terms of importance, and scored each option according to the respondents’ priorities. The results suggest that immediate social and familial networks have the greatest influence on decision-making, with professional support rated as less important. Universities should not only consider the needs and fears of students, but the concerns of their close social networks, particularly parents.

The low score of agents is noteworthy, particularly given that fully half of international students use an international education agent.

Did you, or are you planning to, use an international education agent?

50.3% yes
49.7% no
Yet agents do have a potential position of influence – of those who plan to use an agent, 57 per cent do so at the stage of finding information about universities before they even make an enquiry.

This potential influence varies significantly by income group and region. 58 per cent of Asian students use agents, compared to only 37 per cent of European students, while richer students are less likely to use an agent than those from poorer backgrounds.

Did you, or are you planning to, use an international education agent at these stages? Percentage y region
Did you, or are you planning to, use an international education agent at these stages? Percentage by household income

From theory to practice – building an intelligent recruiting effort

Ultimately, decision-making is decidedly more complex than we might think. Not only do people’s fears, needs, considerations and influencers vary significantly; the logic by which they make decisions varies itself. Fundamentally, many of the steps and methods discussed in this report are common sense, but the implementation of best practice is not yet widespread in this field. Knowing when to use big data, student intelligence, automation and personalised intervention is key when taking a profiling-led approach from strategy to implementation.

In the face of increased competition and changing student demands, and with new technological opportunities available, now more than ever it is imperative that UK universities overhaul their international marketing strategies with a student-first and data-driven approach.
About Hobsons

Hobsons Solutions works with you to transform and future-proof the way you market, acquire, engage, convert and retain students through data-driven decision-making processes.

We partner with education institutions globally to achieve true best practice in student acquisition, performance, and student engagement and retention services. Our team has vast education-specific experience and is made up of a range of discipline specialists. They're backed by extensive up-to-date data and analysis, and the service we provide is supported by best-practice technology.

By working with us you have access to unrivalled knowledge, insight and experience to help you tackle your unique issues. You can make informed decisions and mitigate risks while achieving higher standards of performance and significant cost savings.

Like you, we're not complacent about staying ahead in a highly competitive global education market. We are constantly evolving our suite of solutions, giving you the comfort and support to compete effectively, anticipate trends and future-proof your strategy.

Hobsons Solutions: incomparable insight, exceptional customer service and transformational outcomes. Contact us today to learn how Hobsons Solutions can help your institution.

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16. Minerva College (https://www.minerva.kgi.edu/)
Further Information

Survey framework
The International Student Survey is conducted by Hobsons. Survey invites were sent to prospective international students who had enquired or applied to universities within the 18 months prior to February 2016. The pool of respondents was analysed to ensure that it includes statistically representative numbers of prospective students from the countries that contribute the highest numbers of international students to the UK. All data collected through this survey remains confidential and no individual respondent is identified or made identifiable in any analysis that is presented.

Take part in the International Student Survey
Register your institution to take part in the 2017 ISS at: www.internationalstudentsurvey.com

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