



# INTERNATIONAL STUDENT RECRUITMENT TRENDS IN GLOBAL HIGHER EDUCATION PREPARING FOR A POST-PANDEMIC WORLD

The latest insights from Study Group



# INTRODUCTION

We're here to help our partners around the world prepare for the post-COVID world.

Throughout the pandemic, and specifically in the last quarter of 2020, we conducted a broad range of global and local market research, insight and data analysis initiatives. They were designed to better understand students' and parents' main concerns about studying overseas and how COVID-19 has impacted study choices, along with their perceptions of online learning in the immediate and longer-term future.

We are pleased to share these valuable insights with all those who play a role in supporting international students to realise their goals and ambitions through global Higher Education.

In preparation for the post-pandemic world of overseas study, throughout the paper we introduce some of the solutions and arrangements that we have made to support our partner institutions as they continue to navigate the unknowns in this unique period.

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# KEY FINDINGS

## A number of key themes emerged from our market research:

### **On-campus, face-to-face learning versus online learning**

- Most international students would still prefer to study abroad, on-campus.
- They're willing to consider online and blended learning options when they're positioned as temporary. Trends are showing that online learning is here to stay, at least as an option.
- Undergraduate students favour on-campus delivery, likely due to their desire to experience university life and another country more broadly.
- Postgraduate students prefer remote learning for its flexibility, especially at the moment, but we expect that many will revert back to a preference for on-campus post-COVID.
- Student attitudes vary by country, for example:
  - Vietnam prefers on campus.
  - South-East Asia is more inclined toward online and blended learning.
  - China appears to be most cautious about studying abroad, due to the pandemic.

### **The pandemic and other factors are barriers:**

- The number one barrier is health and wellbeing in relation to COVID-19 but this can depend on the perception of how well the destination has dealt with the pandemic.
- The other barriers – some of which may also be associated with pandemic – are financial stress, the availability of affordable flights, visa issues, closed borders and language.
- Concerns about the quality of online learning experiences from both an educational and social point of view. Institutions must effectively facilitate virtual international student interaction.

### **The future is brighter as students delay, rather than cancel, their studies**

- We expect an increase in demand for study overseas post-pandemic: international students have not been 'put-off' studying overseas, just delayed it.
- US, UK, Canada, Australia, New Zealand and Singapore are still top global Higher Education study destinations.

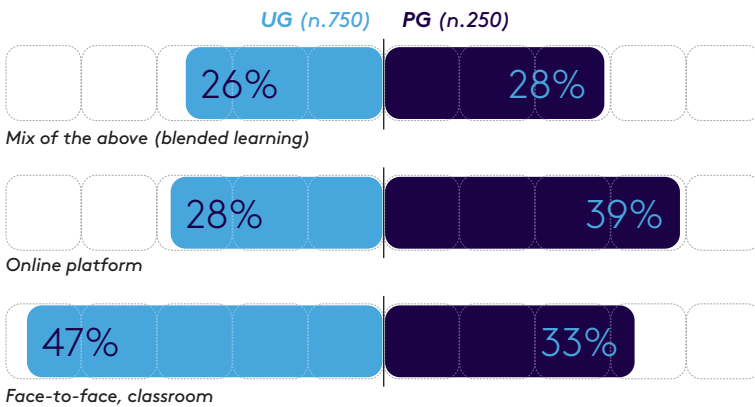
# STUDENT PREFERENCES FOR ONLINE OR ON-CAMPUS

## Strong preference for on-campus delivery

Of the students we surveyed, **43%** would prefer a traditional, **face-to-face study experience**, on a university campus abroad, while 31% prefer online learning and 26% prefer blended learning.<sup>1</sup>

### UNDERGRADUATES AND POSTGRADUATES DIFFER:

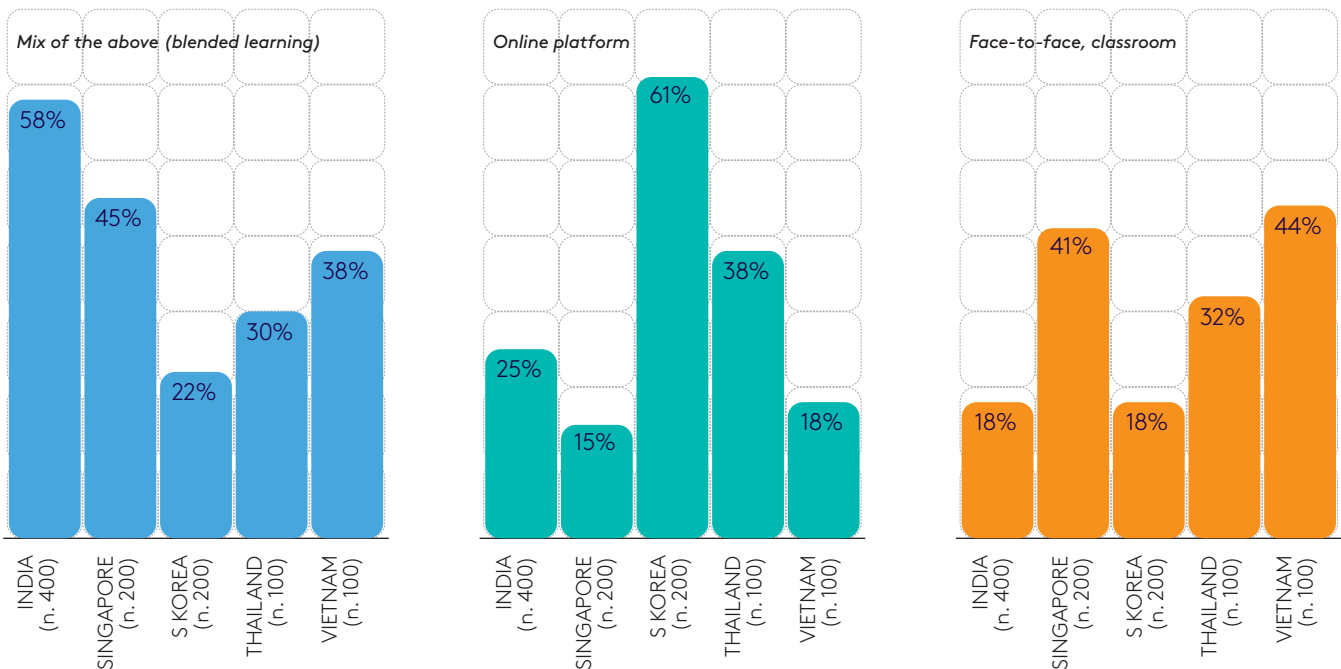
How would you like to study for your degree?



**Students in China overall would prefer a campus-based study experience<sup>2</sup>**

### THERE ARE VARIATIONS BY COUNTRY:

How would you like to study for your degree?



1. Study Group targeted survey of 1000 prospective Undergraduate (total: 750) and Postgraduate students (total: 250) across South Korea, India, Vietnam, Singapore and Thailand

2. Study Group conducted focus groups in China with a mix of Study Group and non-Study Group students currently learning remotely

# SOME APPREHENSIONS REMAIN ABOUT ONLINE LEARNING

Students are concerned about compromising on quality and prefer it to be positioned as a temporary solution.

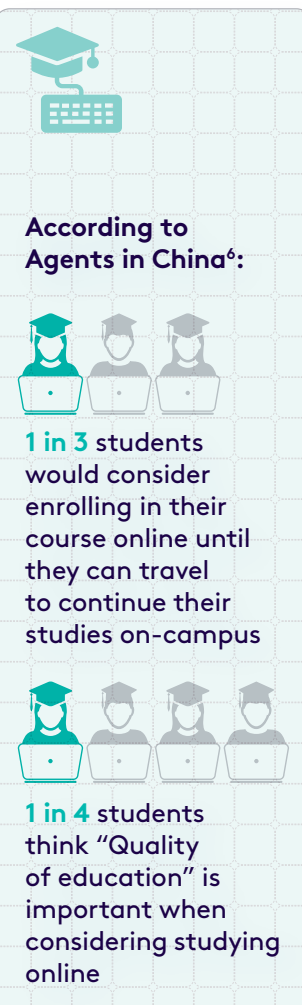
Institutions must consider carefully the set up and positioning to help students feel confident in making their enrolment decisions – communication is key.

More importantly, a World Economic Forum survey<sup>3</sup> from the end of 2020 revealed that many believe that online and hybrid learning will play a much greater role in higher education in the coming years, making it crucial to plan now for this future.

- **72% of high school students** in India and Nepal disagreed that online education would be a good substitute for in-person teaching and learning<sup>4</sup>.
- In a global QS survey nearly half (**47%**) said they would be willing to study online, with another **27%** unsure. Interest in beginning courses online rises to **75%** of prospective students, if the online component is guaranteed to last for no more than three months<sup>5</sup>.

## PROVIDING FLEXIBLE LEARNING OPTIONS

We enable international students to study on-campus, online or via blended learning and make sure they are aware of the study options available to them and the opportunity to transition from online to blended/ on-campus learning.



3. World Economic Forum survey from Q4 2020 with nearly 28,000 respondents.

4. Student Quest survey (IC3 Institute) focused on 2,252 high school students from India and Nepal

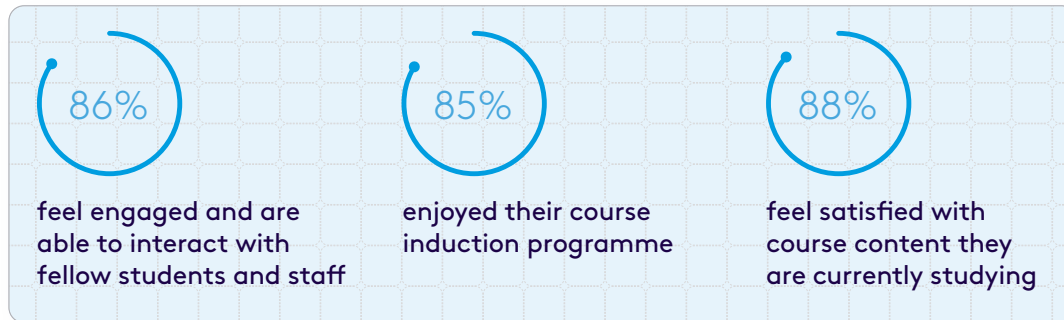
5. QS Survey

6. SG China agent survey (N=57), internal SG survey of Chinese students who rejected our offers in H2 2020 (N=62)

# OVERSEAS LEARNING EXPERIENCES DURING THE PANDEMIC

## Students who started their courses on-campus and online feel highly engaged and satisfied.

We conducted a global survey with over 3000 on-campus and online international students. When asked about the last few months of 2020, they were positive about their experiences at university<sup>7</sup>.



### Online seems to elicit more doubt

Our focus groups revealed that students in China are most concerned about the quality of online, remote learning<sup>2</sup>. Their apprehensions centre around:

- Courses not being as academically rigorous and demanding.
- Not feeling part of an international learning community.
- Whether their study programme – when experienced online – is worth the significant financial and time investment.

“Many of my classmates just sign in on the streaming classes and don’t do their assignments. We may fall behind.”

“We are not getting the real experience.”

### FOCUSING ON ACADEMIC QUALITY AND STUDENT SUPPORT PROVISION

We proactively address key concern areas, including:

**Academic quality** – highlight the quality of our face-to-face, blended and online learning provision, supported by our innovative Learning Experience Platform powered by Insendi and outstanding university partners.

**Student success** – ensure that international students have access to all of our face-to-face and online learning and pastoral support provision, to help them achieve their desired progression outcomes.

7. Study Group global survey with over 3000 on-campus international students

2. Study Group conducted focus groups in China with a mix of Study Group and non-Study Group students currently learning remotely

# STUDENTS ARE REMAKING THEIR PLANS

## Good news: students are deferring not cancelling

All reports suggest that the general appetite for international study has not abated, the pandemic has merely caused plans to shift.

- The QS Survey<sup>5</sup> found **55% intended to delay or defer** their study abroad plans until next year (vs. 57% in May and 46% in April 2020).
- According to another report<sup>8</sup>, relatively few students intended to cancel plans for study abroad, with most **planning to defer their programme starts to 2021**.
- Agents in China<sup>6</sup> observe students deferring rather than cancelling and **~45% think that safety in their chosen study destination is the main reason** for them deferring/postponing their course.
- For those students applying to UK institutions specifically:
  - **40% are ready to delay their study plans** by 6 months or more<sup>9</sup>.
  - **1 in 3 are ready to defer enrolment** until they can begin their programme on campus<sup>9</sup>.



5. QS Survey

8. EY Parthenon Study

6. SG China agent survey (N=57), internal SG survey of Chinese students who rejected our offers in H2 2020 (N=62)

9. UKVI Quarterly Statistics

# GREATER HESITATION IN CHINA DUE TO HEALTH AND SAFETY

According to our focus groups, the pandemic, and the continuing worry it presents, are the biggest factors causing students in China to change their overseas study plans<sup>2</sup>.

- Parents are the key decision makers there and their **main concern is the COVID-19 situation**.
- They see the value of international education but are **currently not comfortable with their child travelling overseas** to study, despite the availability of vaccines.
- **32%** of agents consider health and safety in the destination country as the **main factor affecting students' decisions**.

Agents in China identified the two most important measures to reassure students<sup>6</sup>:

- Assurance that if their programme is delayed, **their place will be held for the next available on-campus intake**.
- **Full or partial money back** in the event of a programme delay or cancellation.

“I dare not go to the US even if I get vaccinated. There is no guarantee that the virus won't mutate, and I won't get contracted.”

“I actually booked my accommodation and planned to leave for the UK in January, but my mother is worried if the pandemic gets worse. They are most worried about the safety and health.”



2. Study Group conducted focus groups in China with a mix of Study Group and non-Study Group students currently learning remotely

6. SG China agent survey (N=57), internal SG survey of Chinese students who rejected our offers in H2 2020 (N=62)

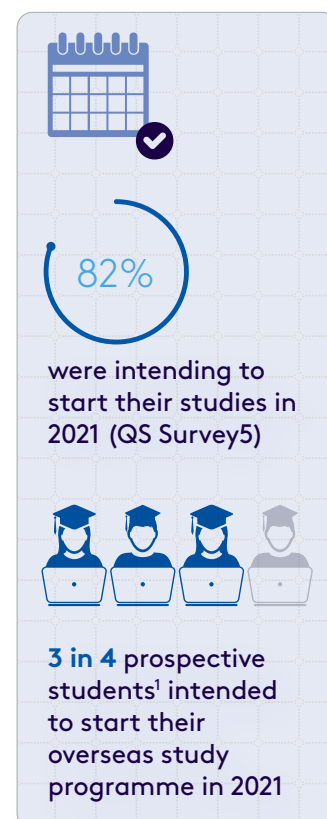


# GET READY FOR AN INCREASE IN DEMAND

High demand for international study continues. From the various research we reviewed, we found that students are driven more by the 'pull' factors or the appeal of key destinations, rather than 'push' factors at home that prompt them to seek opportunities overseas.

This, along with students deferring rather than cancelling their plans, is a strong indicator that we will see **an increase in demand in 2021**.

- In our own survey, **75%** of prospective students<sup>1</sup> intended to start their overseas study programme in 2021.
- The QS Survey<sup>5</sup> found **82%** were intending to start their studies in 2021, followed by 11% in 2022 and 8% in 2023.
- **83%** of Indian and Nepalese high school students remain optimistic about higher education abroad<sup>4</sup> – despite the current challenges due to COVID-19 – with a third still planning to study abroad in the immediate future.
- The ability to **gain work experience after graduation** was shown to be a significant priority for students from India and Nepal – a key 'pull' factor<sup>4</sup>.
- **45%** of students<sup>9</sup> feel positive about the COVID-19 vaccine and see it supporting their study abroad plans.
- **1 in 5** offer holders<sup>10</sup> who rejected a Study Group offer in H2 2020 are planning to reapply in the near future.
- Only **5%** of students<sup>9</sup> are considering cancelling their study abroad plans to study in their home country instead.



## WE CAN ASSIST AS YOU DEAL WITH THE EXPECTED INCREASE IN DEMAND FOR STUDY OVERSEAS POST-PANDEMIC, SUPPORTING STUDENTS TO STUDY ON CAMPUS AS FOLLOWS:

**Transactional** – support international students to obtain visas and guide them through the admissions process every step of the way.

**Health and safety** – ensure a safe campus environment that meets the needs and expectations of international students and their parents during and post-pandemic.

**Student support** – ensure that there is a robust and inclusive international student orientation and induction process, so they quickly adapt to living and studying abroad.

**Student success** – outline how international students can transition from online to blended/ face-to-face learning or directly to on-campus learning (in the case of newly enrolled students) and seamlessly access the university programme of their choice, once they have completed their chosen pathway programme.

1. Study Group targeted survey of 1000 prospective Undergraduate (total: 750) and Postgraduate students (total: 250) across South Korea, India, Vietnam, Singapore and Thailand  
3. Student Quest survey (IC3 Institute) focused on 2,252 high school students from India and Nepal

4. QS Survey  
9. UKVI Quarterly Statistics, UCAS 2020 end of cycle report, internal SG survey of students who rejected our offers in H2 2020 & currently hold offers for H1 2021 (N=1320)

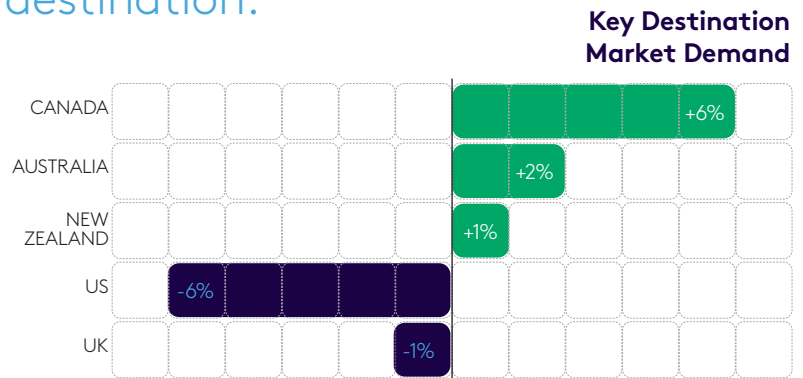
10. Internal Study Group survey of Chinese students who rejected our offers in H2 2020 (N=62)

# INSIGHT INTO HIGHER EDUCATION DESTINATION PREFERENCES

There are many factors impacting on a student's choice of study destination.

For some major study destinations, the authors of an EY Parthenon study<sup>8</sup> carried out in Q3 2020 anticipate a shift in destination market share over the next several years:

- Canada **+6%**
- Australia **+2%**
- New Zealand **+1%**
- US **-6%**
- UK\* **-1%**



\*We note however that the UK has more recently moved to reopen visa processing services and to ease conditions for students needing to maintain visa status, renew their visas, or open a new visa application, which bodes well for longer term growth, despite negative perceptions of the country's pandemic management.

## Top 5 destinations:

- US (two-thirds selected it as top)
- UK
- Canada
- Australia
- Singapore



## Top 5 study destinations

- 1 **US**
- 2 **UK**
- 3 **CANADA**
- 4 **AUSTRALIA**
- 5 **SINGAPORE**



4. Student Quest survey (IC3 Institute) focused on 2,252 high school students from India and Nepal

8. EY Parthenon Study

# THE FUTURE IS BRIGHTER

Everyone has risen to the challenge presented by the pandemic to support current and potential international students.

From recruiters running virtual study-abroad fairs to governments providing additional funding and countries re-opening, we're all working hard to ensure that as many students as possible can access the global education they desire.

These highlights tell a story of hope:

## SOURCE MARKET NEWS

### ***International enrolment management for 2021: Virtual events and 24-hour recruiting***

Virtual recruitment fairs have become a lifeline for many institutions this year, and some colleges are banding together with others in the same region to increase their visibility and attract more students than they otherwise could; it allows them to compete on a more level playing field. [Read article](#)

### ***China's higher education system is world's largest, officials say***

China has built the world's largest higher education system, with more than 40 million students, the Ministry of Education said. The gross enrolment rate in tertiary education increased from 40% in 2015 to 51.6% last year. [Read article](#)

### ***Several States in India have partially opened schools***

2021 started with few states in India reopening schools in a phased manner. COVID-19 cases have decreased across India and lockdown restrictions have been eased out, though concerns over new Covid strain prevails. [Read article](#)

### ***Malaysian universities given funds to 'weather the pandemic'***

More than 20 per cent of Malaysia's 2021 budget, equalling MYR64.8 billion (£12 billion), is set to go to education. This will make the sector the largest recipient of state aid in the country's largest-ever budget, which has passed parliament but whose details are still being debated. [Read article](#)

## DESTINATION MARKET NEWS

### ***Vaccine breakthroughs lead to updated forecasts for COVID recovery***

Much remains uncertain in terms of what 2021 will look like for people across the world. In terms of international education, there is room for optimism. Major destination countries – because of their access to vaccines – will be perceived as safe and demand for education in these countries will pick up. [Read article](#)

### ***Canada expands pathway to residency for work permit holders***

Canada has announced a policy for former international students with post-graduation work permits to apply for open work permits in a bid to retain talent as it seeks more international graduates to become permanent residents. The government estimates that up to 52,000 graduates could benefit from the new policy. [Read article](#)

### ***New Zealand to reopen borders to 1,000 international students from April***

New Zealand has announced it is reopening borders to 1,000 international students who were caught offshore when border restrictions began. Approved students will be allowed to return to New Zealand in stages from April 2021 as part of the government's recovery plan for international education. [Read article](#)

### ***US sector must be savvy, leverage domestic budget to boost 2021 outlook***

US institutions are looking for cost-effective solutions to engage with international Generation Z students as recruitment budgets have been slashed by around 15% at colleges across the country. [Read article](#)



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