

UCAS

STUDENT  
MINDSET  
CONFERENCE

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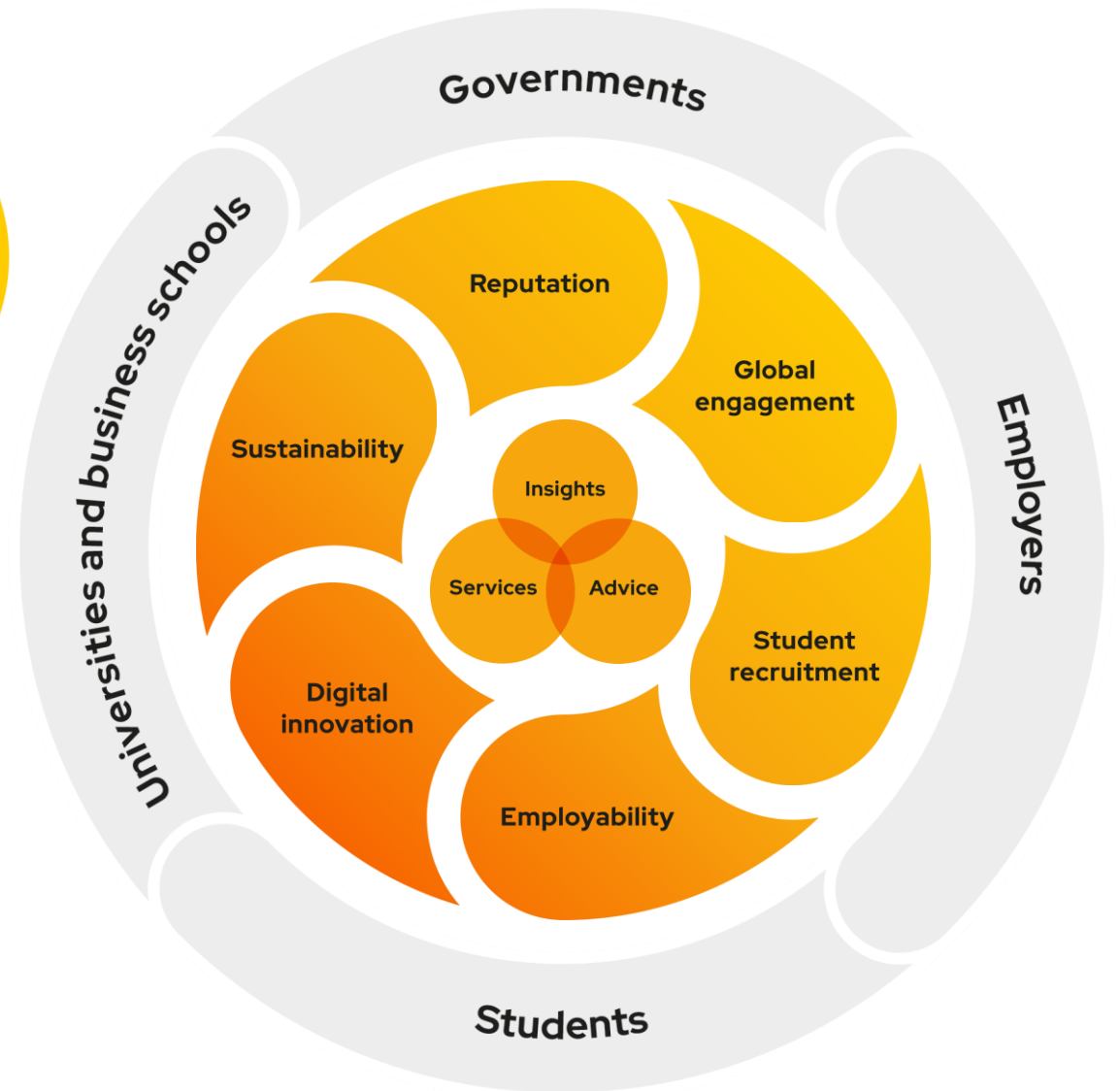
2024

QS

The Global Higher Education experts

# We are the global enablement partner to higher education

We work together with the sector to transform strategy into impact through our unique blend of data-driven insights, strategic advice and 800+ higher education experts across the globe.



# How do we achieve this?

From billions of data points including:

**100K**

student enrolments

**485K**

students surveyed



**200M+**

jobs and skills

**5.6K**

institutions analysed



**75M**

website visits



# Your QS Insights Partners Today:



Kym Nguyen

Vice President,  
Student Recruitment



Becky Hopwood

Head of Growth  
Digital



- Challenges and opportunities for the UK
- Student decision-making
- Student concerns
- Their expectations
- How you can deliver the best experience



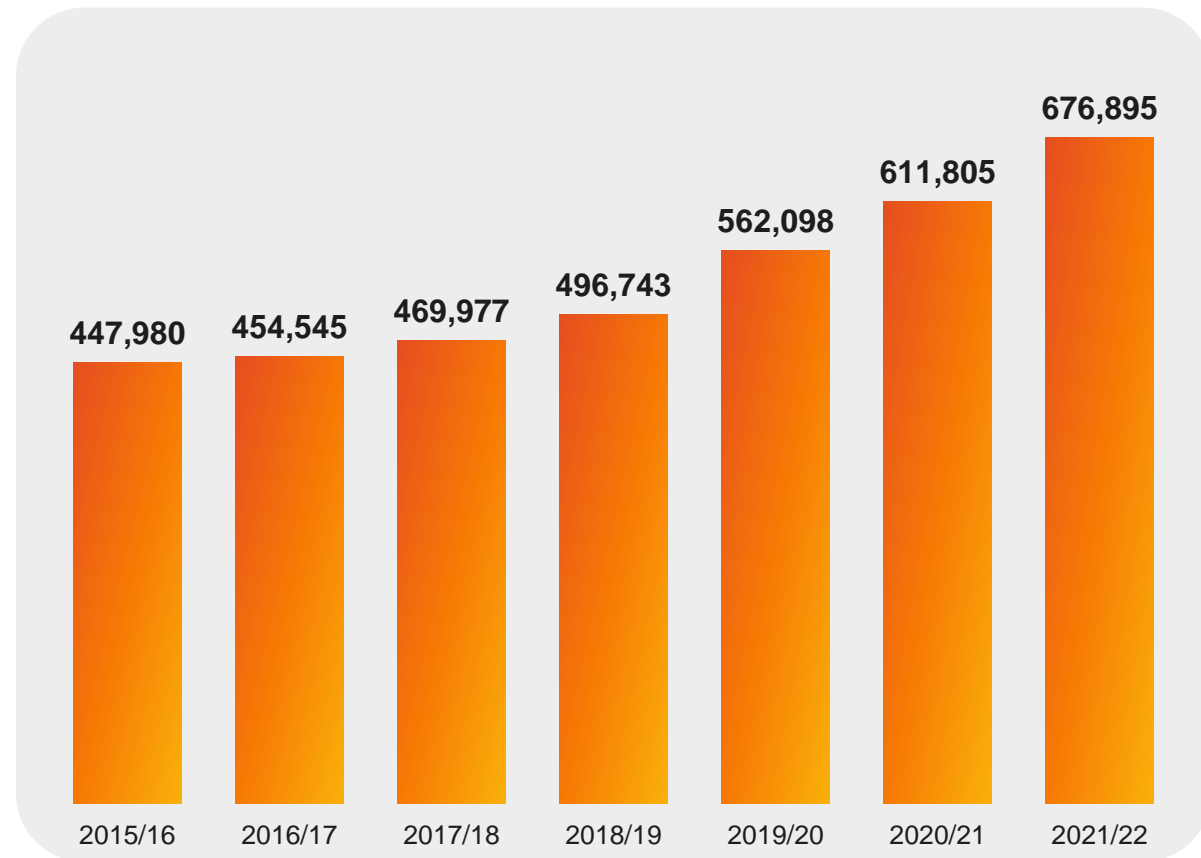
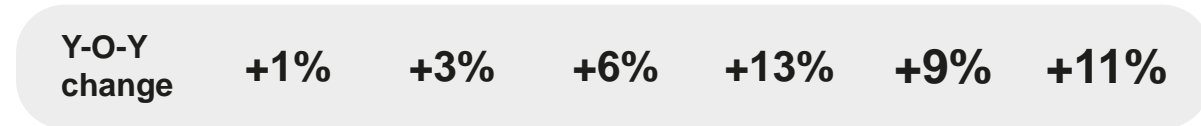
# Challenges and opportunities in global student recruitment

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# International enrolments have grown strongly since Covid

International enrolments in UK: 2015 - 2022



Source: HESA

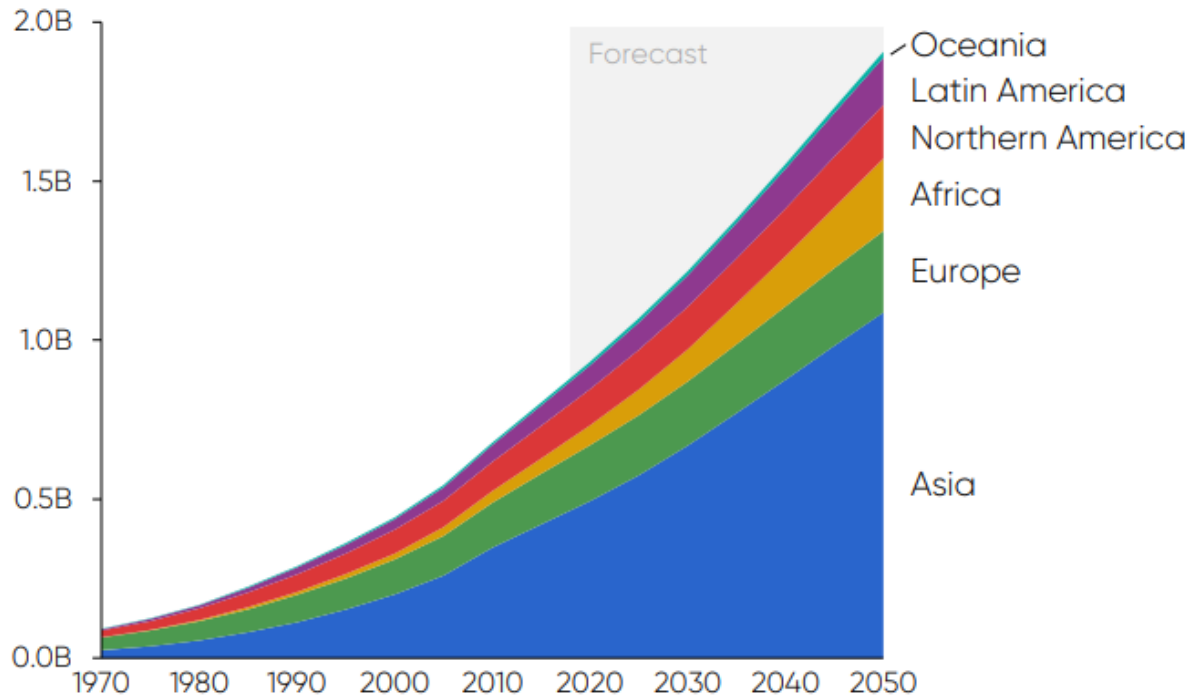
International enrolments have grown by 514 since 2016

International Students now make up 24.44 of the student population (up from 234 in the previous year)

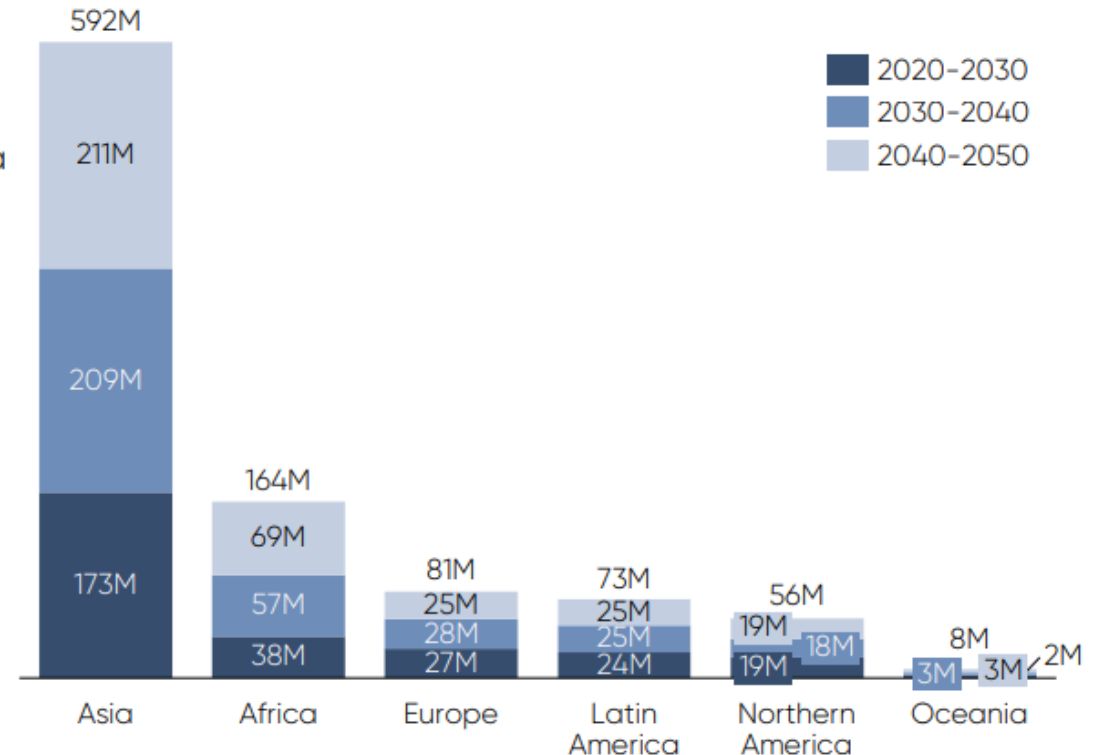


We expect 1 Billion additional post-secondary graduates over the next 30 years. 75% will be from Asia and Africa, and many will be seeking an English based degree or credential from a top ranking institution.

**Billions** of people on earth with a formal post-secondary credential by continent. 1970 – 2050F (SSP2 Medium Forecast Scenario).



**Millions** of new formal post-secondary graduates by decade and by continent. 2020 – 2050F (Medium Scenario).

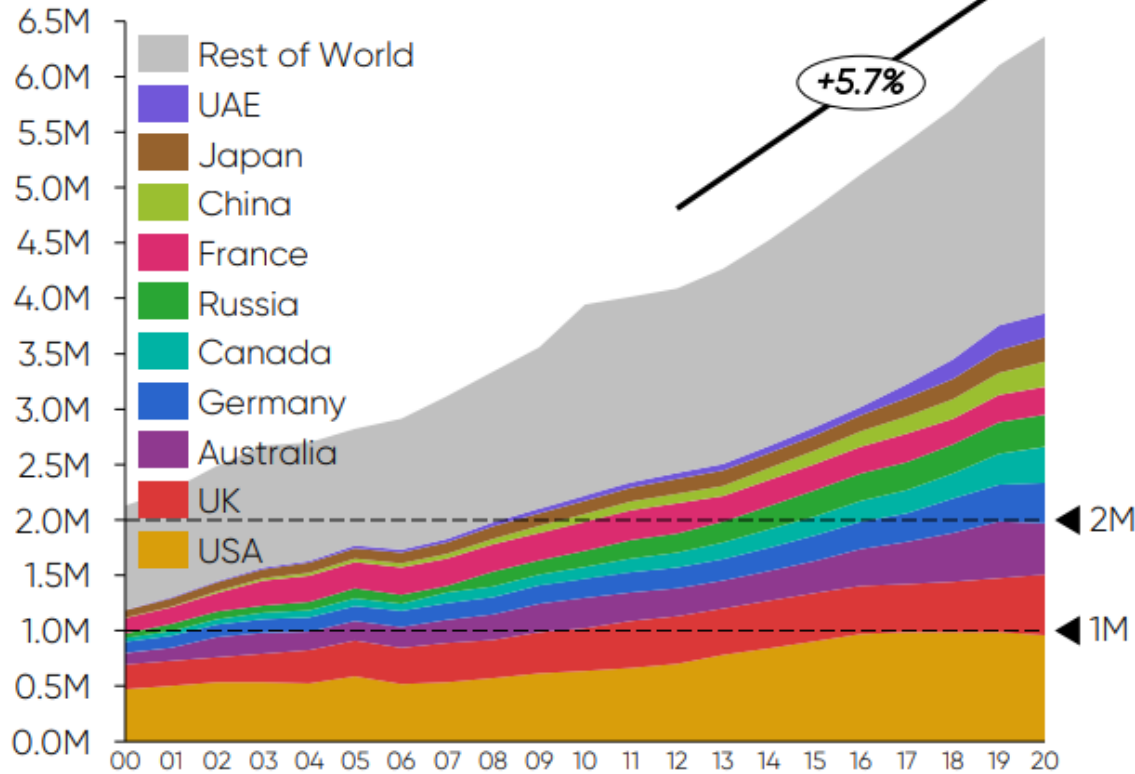


Source: HolonIQ, Wittgenstein Centre Medium Forecast Scenario (SSP2), 2019. Continents capture students from their home market, not their study destination.

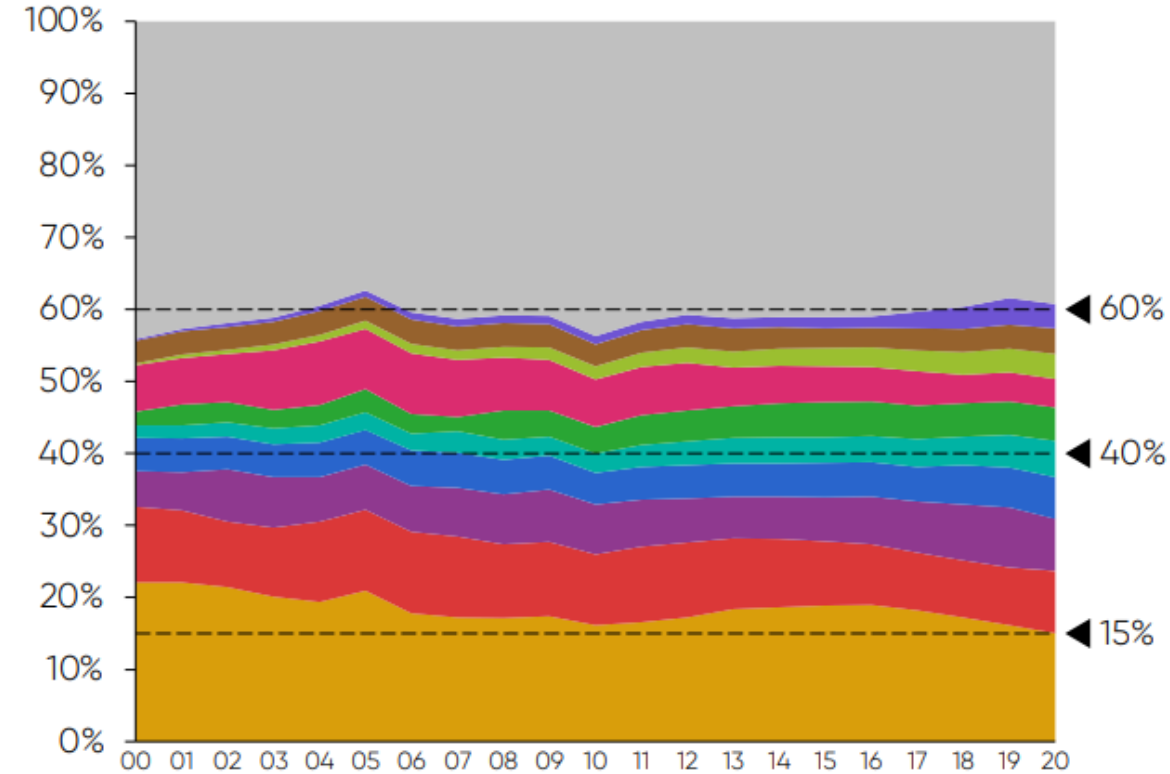


Global Flows have tripled in the prior 20 years. From 2 million enrolments in 2000 to over 6 million in 2020.

Total Inbound International Students by Destination



Total Share of Top 10 Inbound International Students



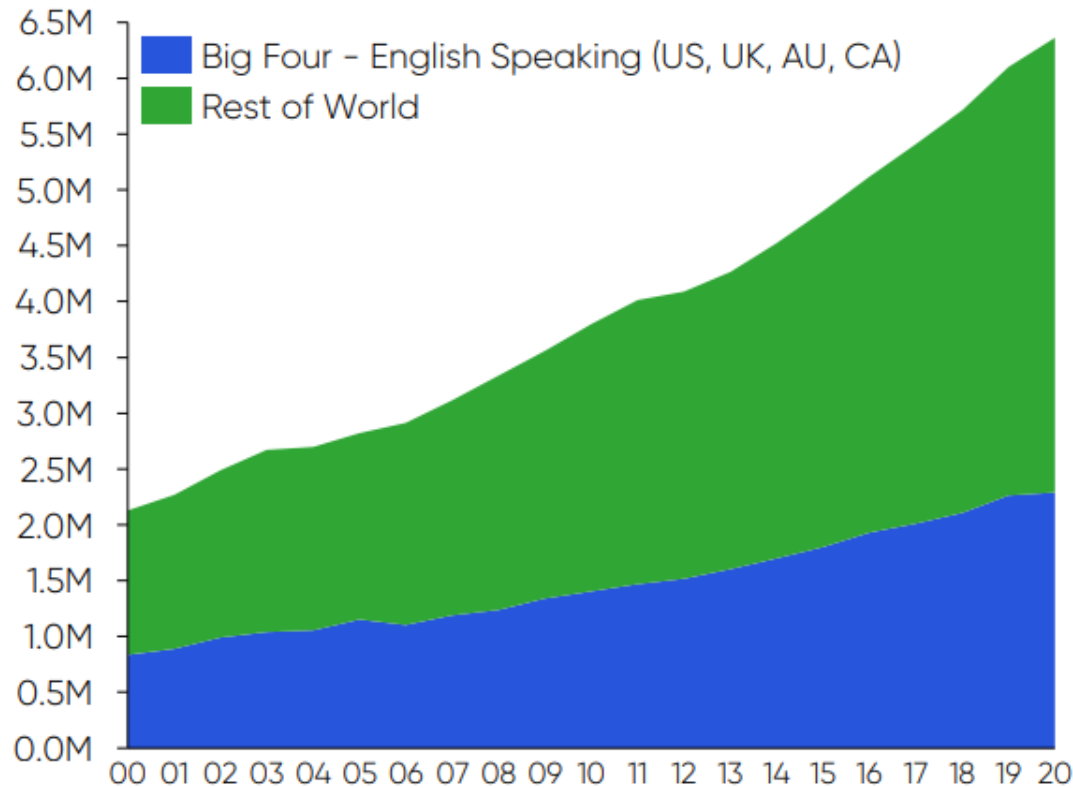
Source: HolonIQ, UNESCO Total inbound internationally mobile students, both sexes (number). HolonIQ estimates and interpolations on missing UNESCO Data. US gaps in UNESCO Data from 2000-2012 based on 92% of Open Doors Flows (Average UNESCO % of Open Doors for UNESCO vs Open Doors Data 2013-2020).



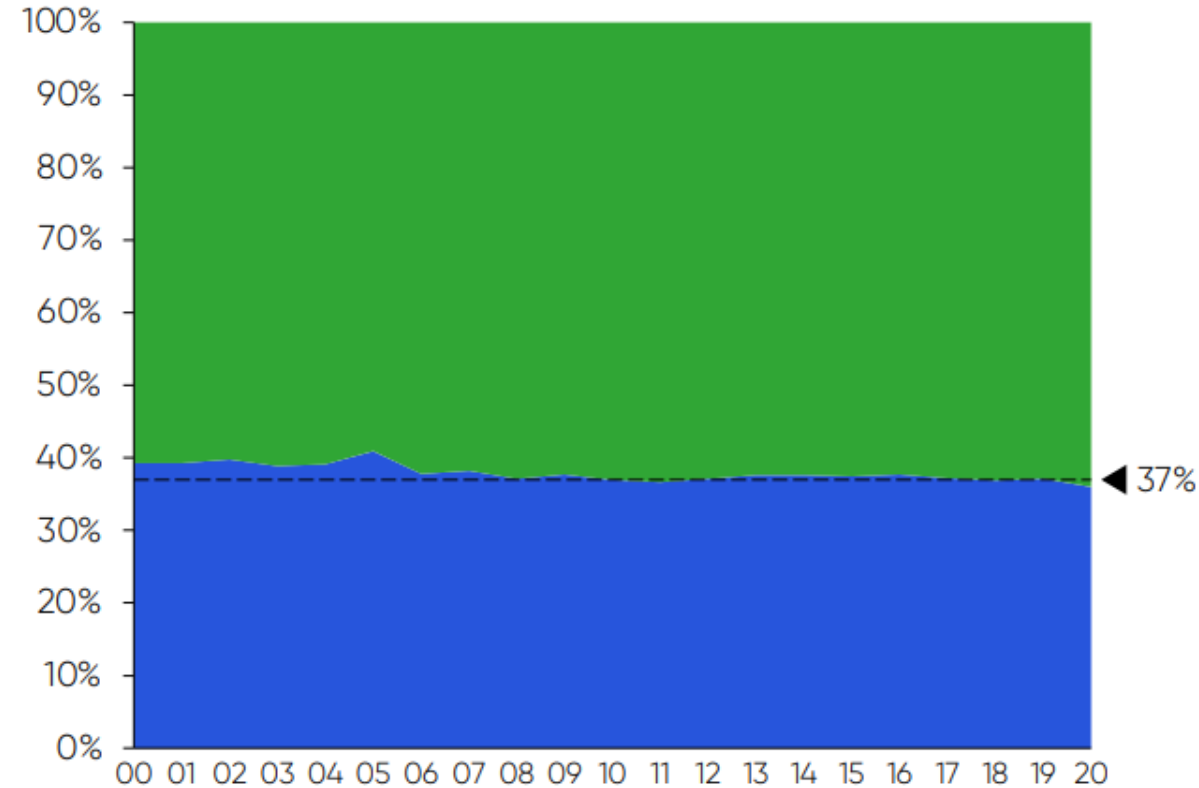


The 'Big Four' English Speaking Study Destinations have held approx 37% share of global flows since 2000.

Total Inbound International Students



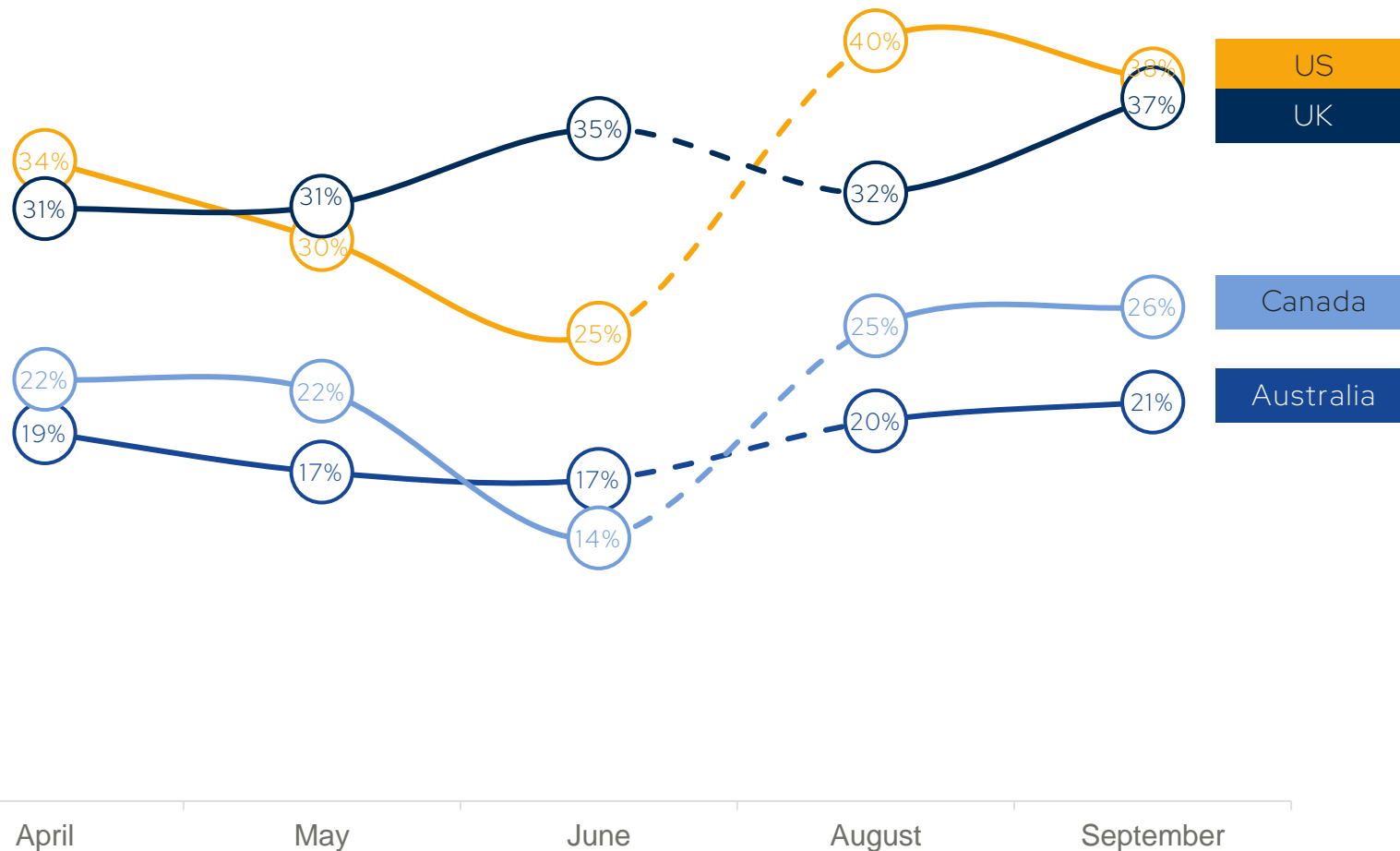
Total Share of Inbound International Students



Source: HolonIQ, UNESCO Total inbound internationally mobile students, both sexes (number). US gaps in UNESCO Data from 2000-2013 calculated based on 92% of Open Doors Flows (Average UNESCO % of Open Doors for UNESCO vs Open Doors Data 2013-2020)

# Demand for the major destination markets has fluctuated significantly over the last year

Consideration of core destination markets April – September 2024\*:



A shifting regulatory environment in a number of these markets has created instability for student decision-making

\*Graph shows responses from users of topuniversities.com only

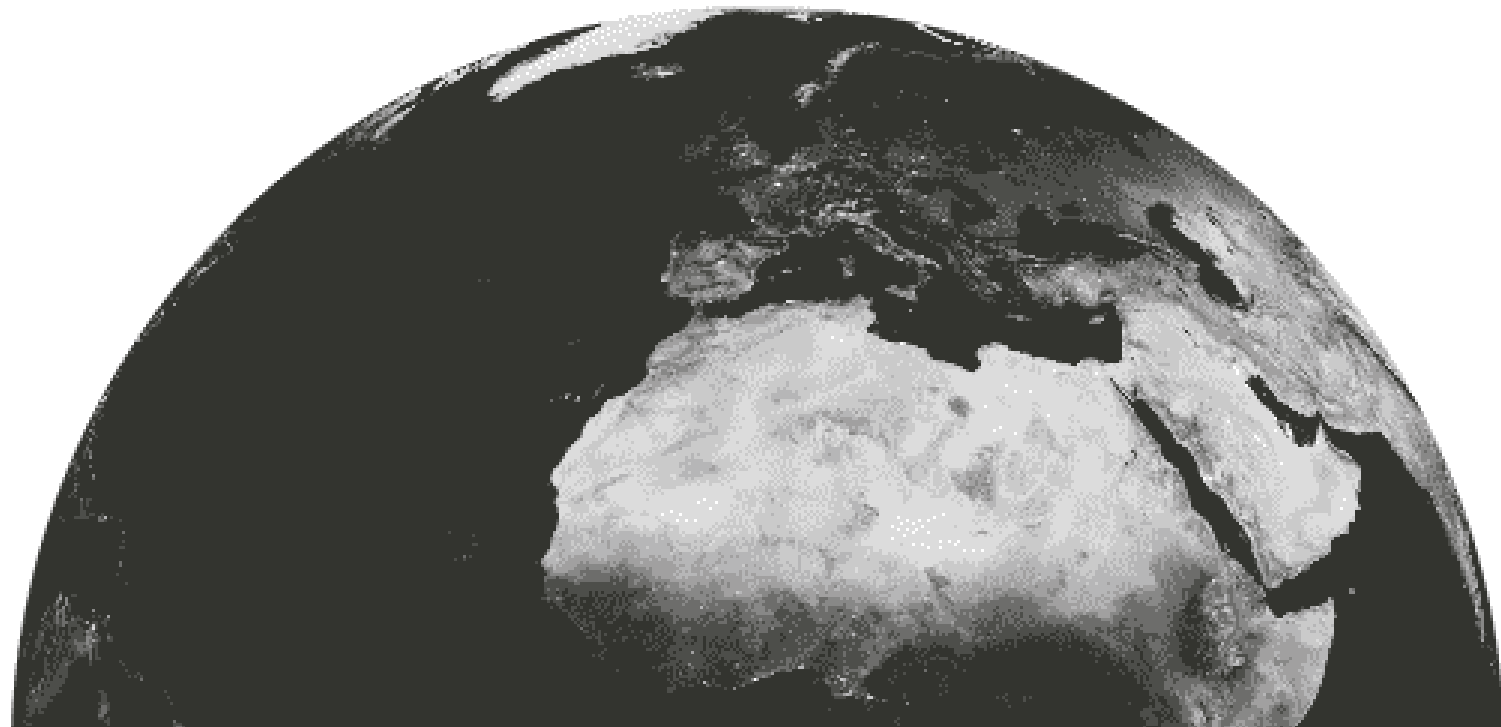


# Listening to and understanding student perception and expectations

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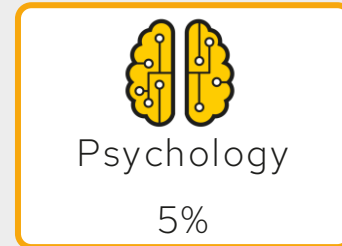
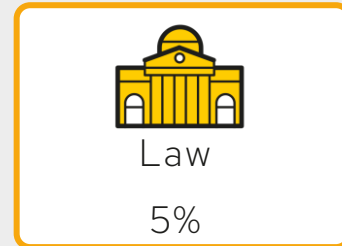
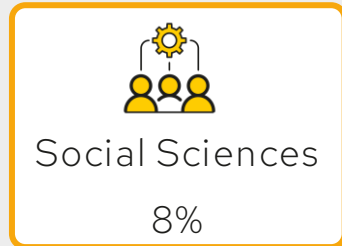
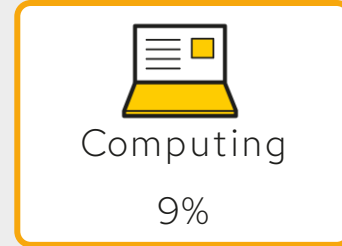
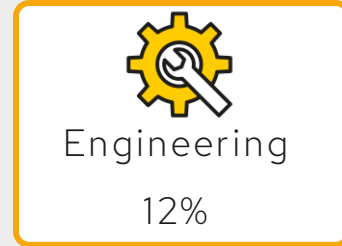


68,353 students from 196 countries  
interested in studying in  
the UK

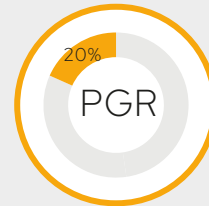
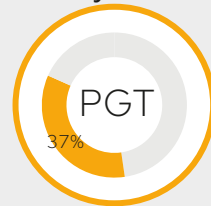
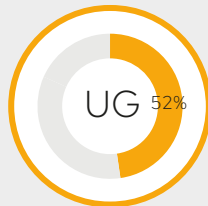


# Study demographics for those interested in the UK:

## Most popular subjects



## Study level



## Top competitor markets



Teaching quality, a welcoming environment and institutional reputation are all important factors when candidates make study decisions...



### Course selection

1. The course offers high quality teaching
2. It is at a university with a good reputation
3. I have personal interest in the subject



### Country selection

1. It has universities with high quality teaching
2. It is welcoming to international students
3. It has well-ranked universities

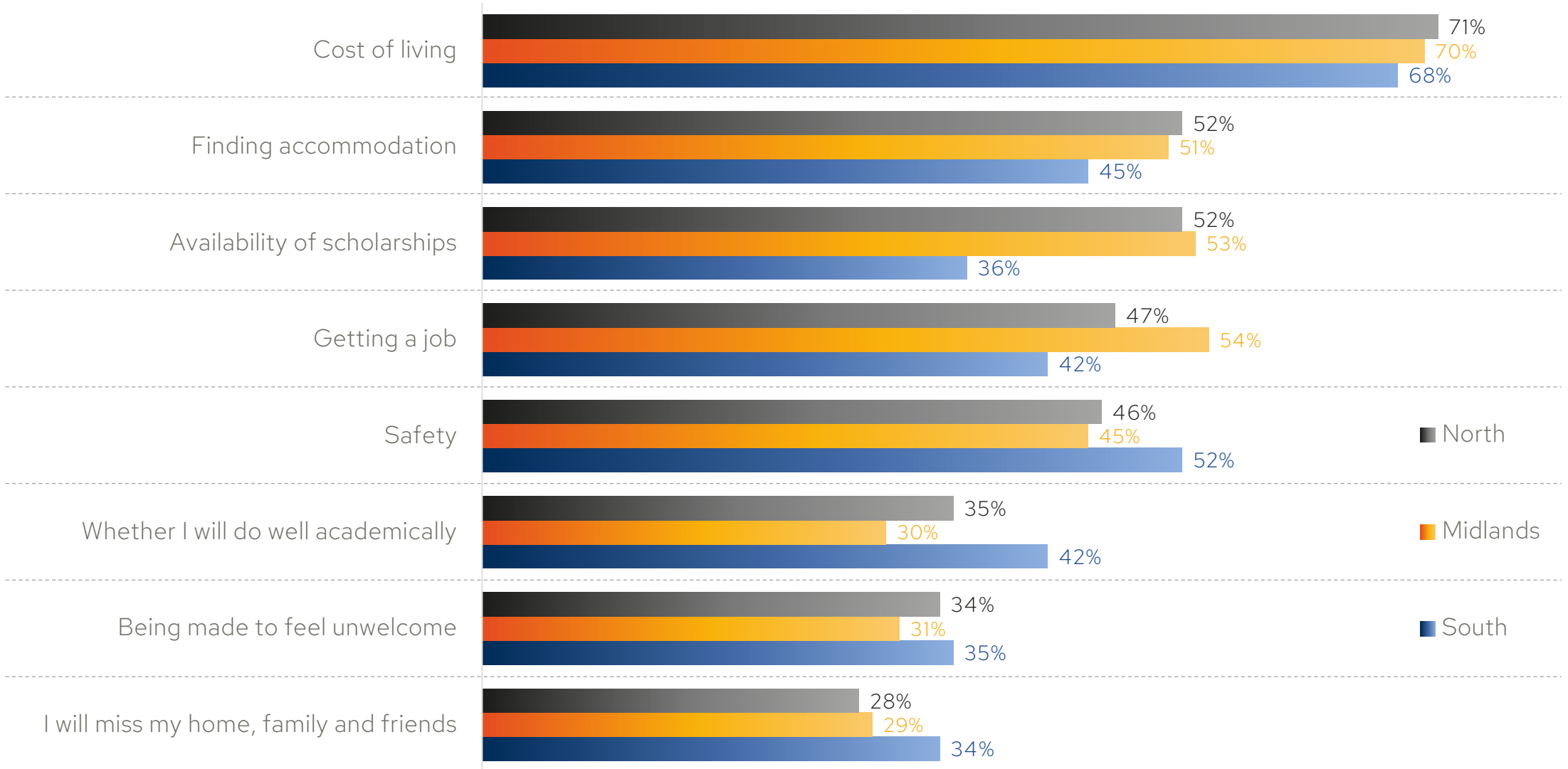


### University selection

1. It offers high quality teaching
2. It has a good reputation for my chosen subject area
3. It is welcoming to international students

# Cost of living and finding accommodation worries students most.

What worries you most about studying in a different country?



UK - 68,353 RESPONSES

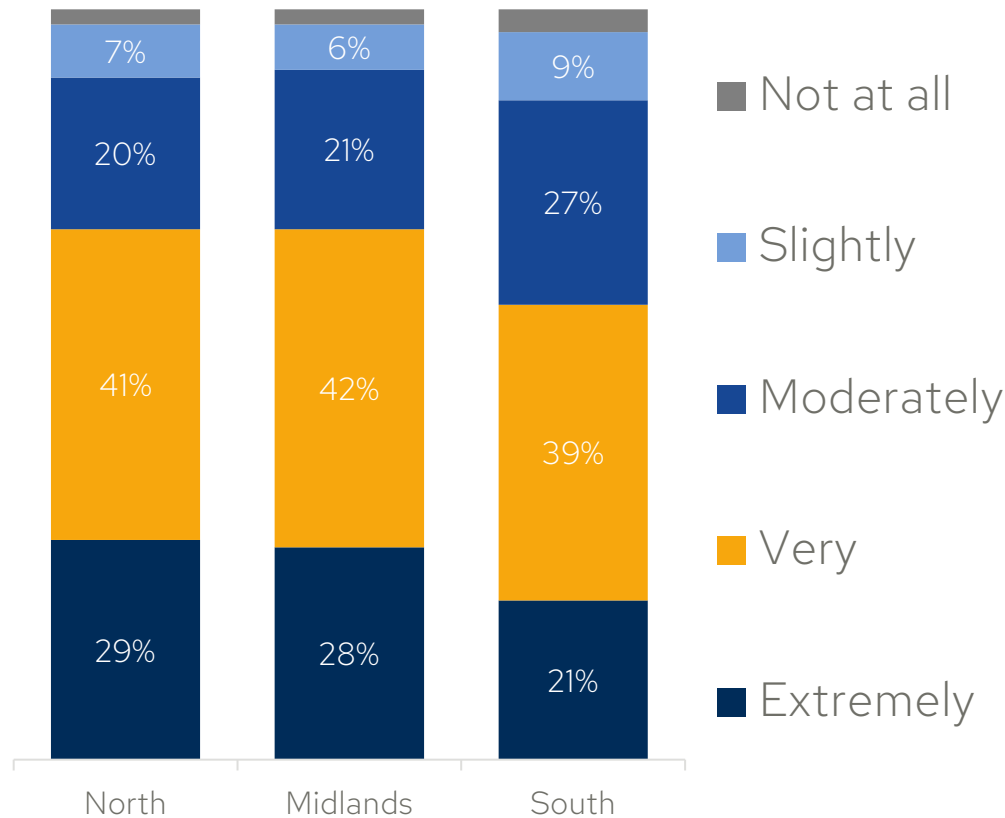


Source: QS International Student Survey 2024

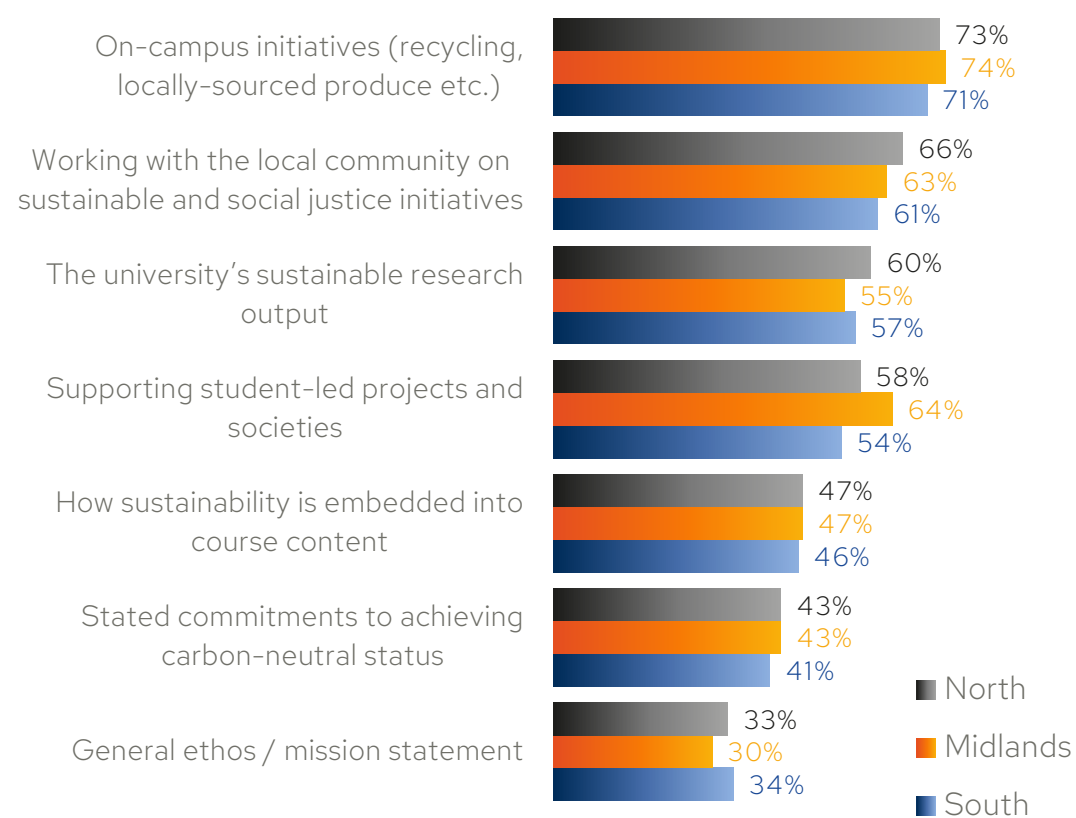


Sustainability is an important issue to students, with local community and on-campus initiatives the best way to showcase your credentials  
 Over 70% of prospective North/Midlands students say sustainability is *very* or *extremely* important to them

How important is environmental sustainability to you?



What's most important to you when judging whether a university is environmentally sustainable?



Source: QS International Student Survey 2024



# Cost of living and scholarships are the principal concerns for the majority of the major source markets for UK institutions

What worries you most about studying in a different country?

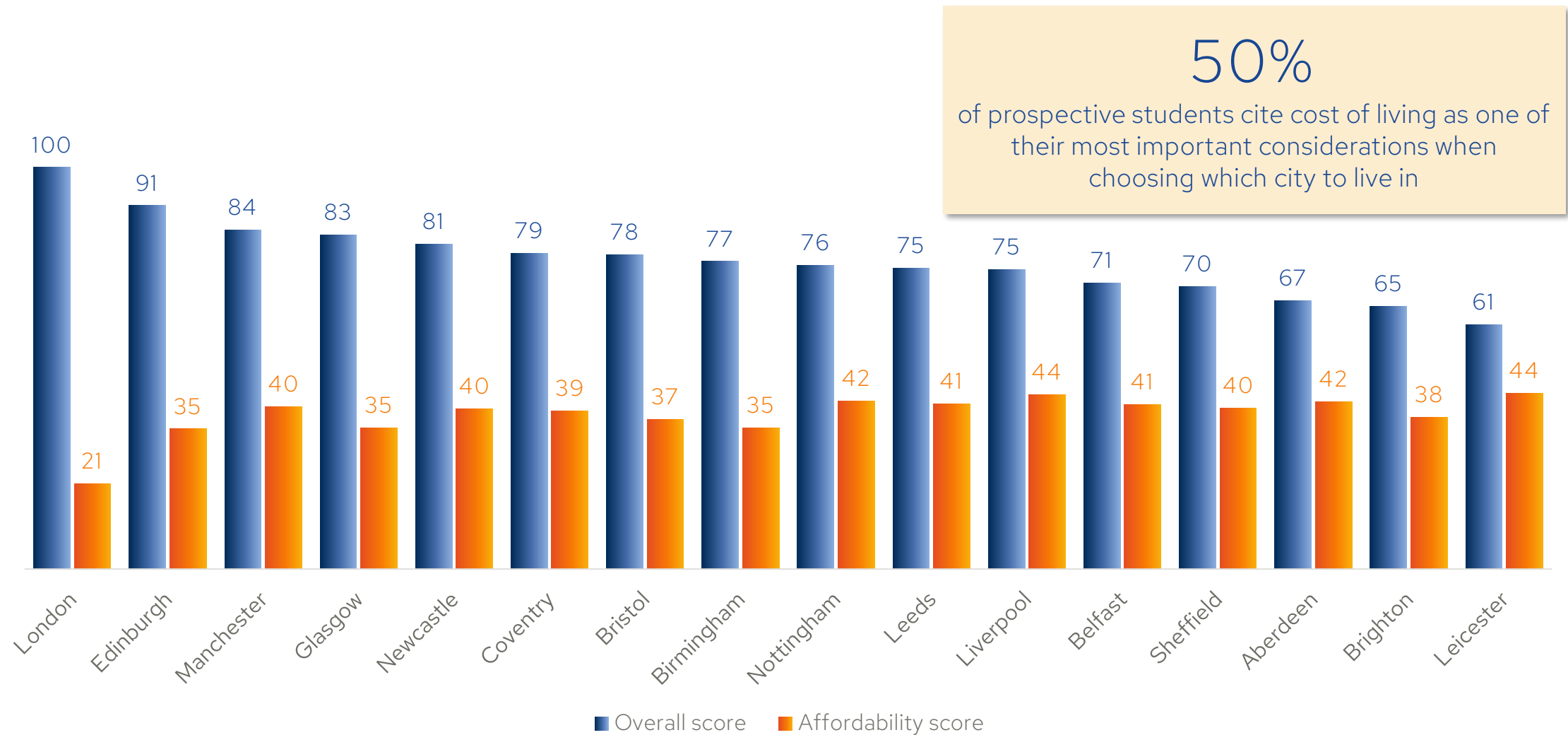
	North					Midlands					South				
	China	India	Nigeria	USA	Pakistan	India	China	Nigeria	Pakistan	Romania	China	India	USA	Nigeria	HK
Cost of living	2	1	1	1	2	1	2	1	2	1	2	1	1	1	1
Safety	1						1				1				
Doing well academically	3						3				3				
Getting a job		2				2						2			3
Scholarship availability		3	2	2	1	3		2	1	2		3	3	2	2
Finding accommodation			3	3	3			3	3	3			2	3	

Source: QS International Student Survey 2024



# Cost of living is one of the most important considerations for students, however most UK cities underperform on affordability

UK cities comparison of overall score vs affordability score in QS Best Student Cities Ranking



Source: QS Best Student Cities Ranking 2025

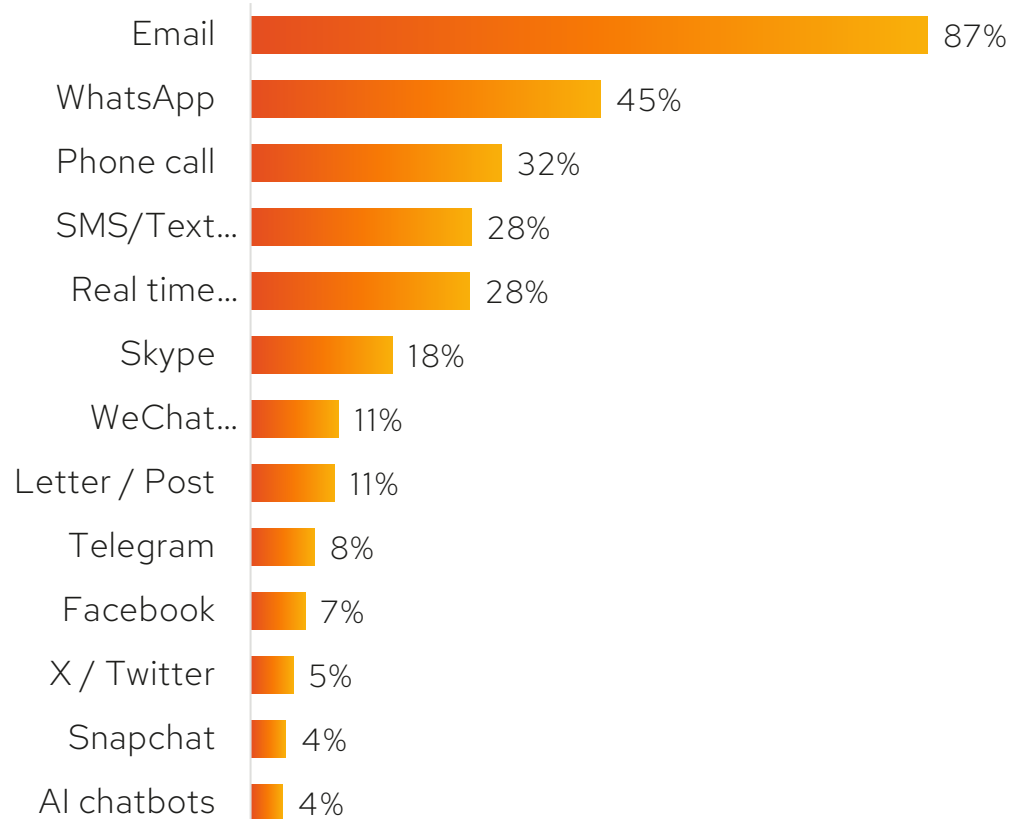


Which of these would you like to use to communicate with a university you are considering studying at?

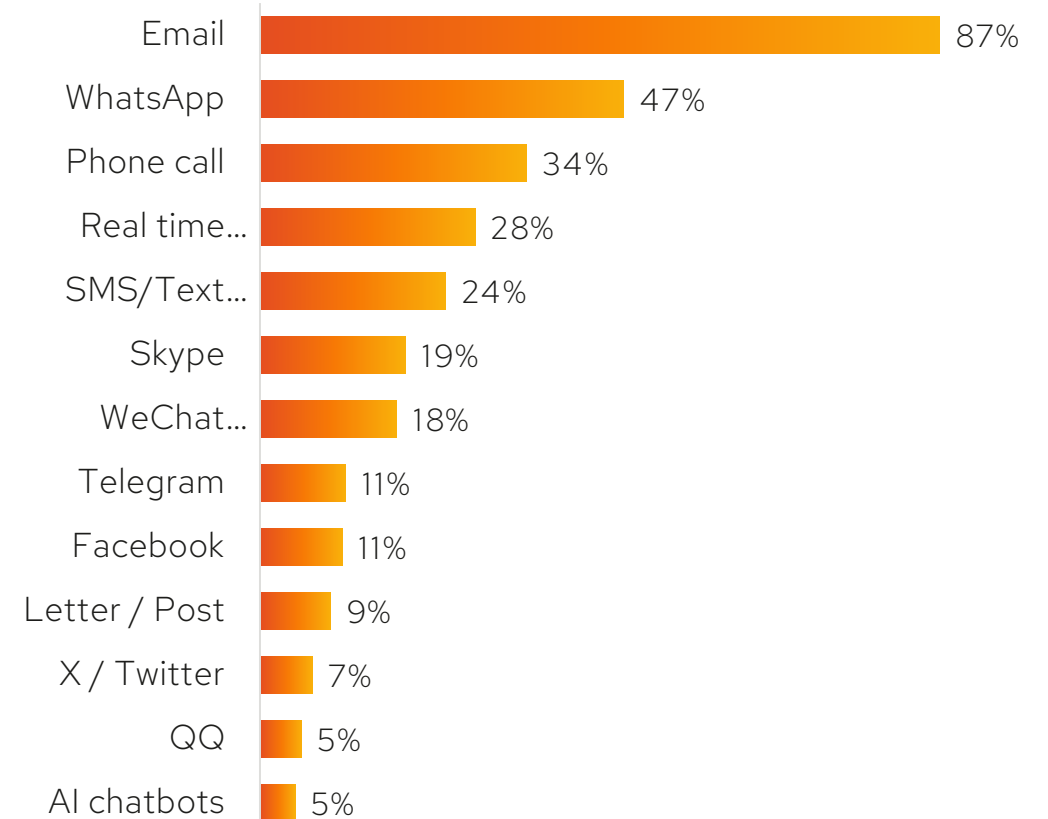
#1

Email is still the most preferred method of communication

### Undergraduate



### Postgraduate



# And the spread of preferred channels to communicate with institutions can vary significantly across the principal source markets

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

	China	India	USA	Nigeria	Pakistan
Email	1	1	1	1	1
WeChat	2				
Real-time chat on website	3		4		
Phone call	4	3	3	3	3
SMS / Text	5	4	2	4	4
WhatsApp		2	5	2	2
Teams		5			
Telegram				5	
Facebook					5

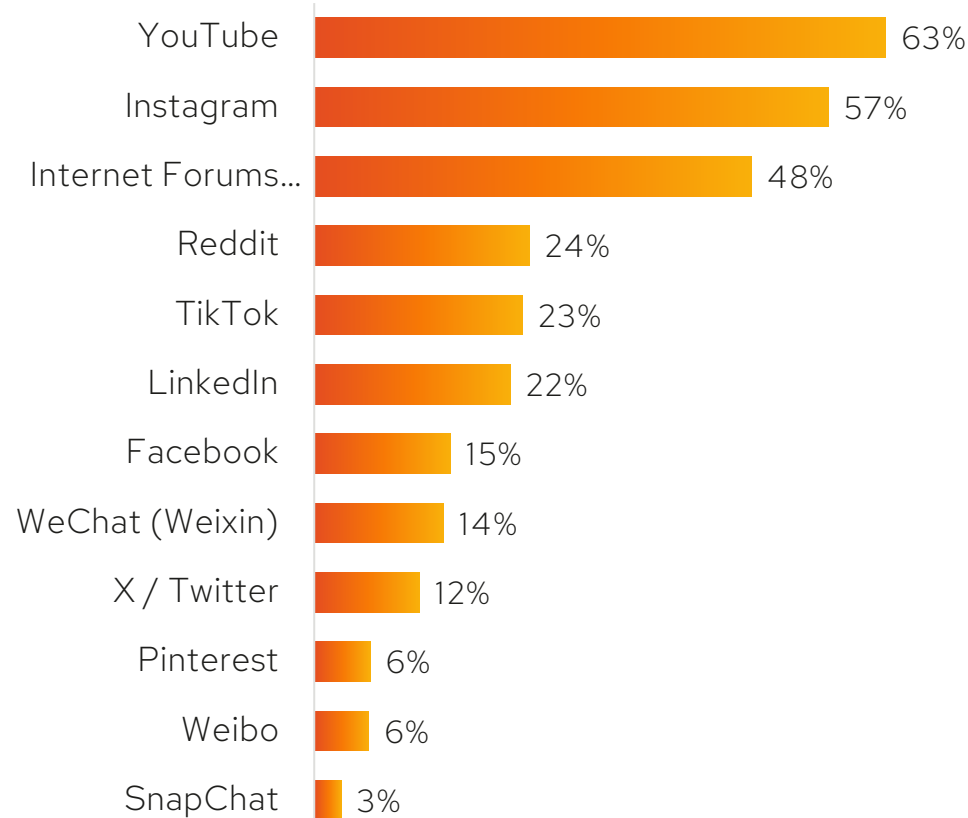


# Which of the following types of social media do you use for research when making decisions about studying overseas?

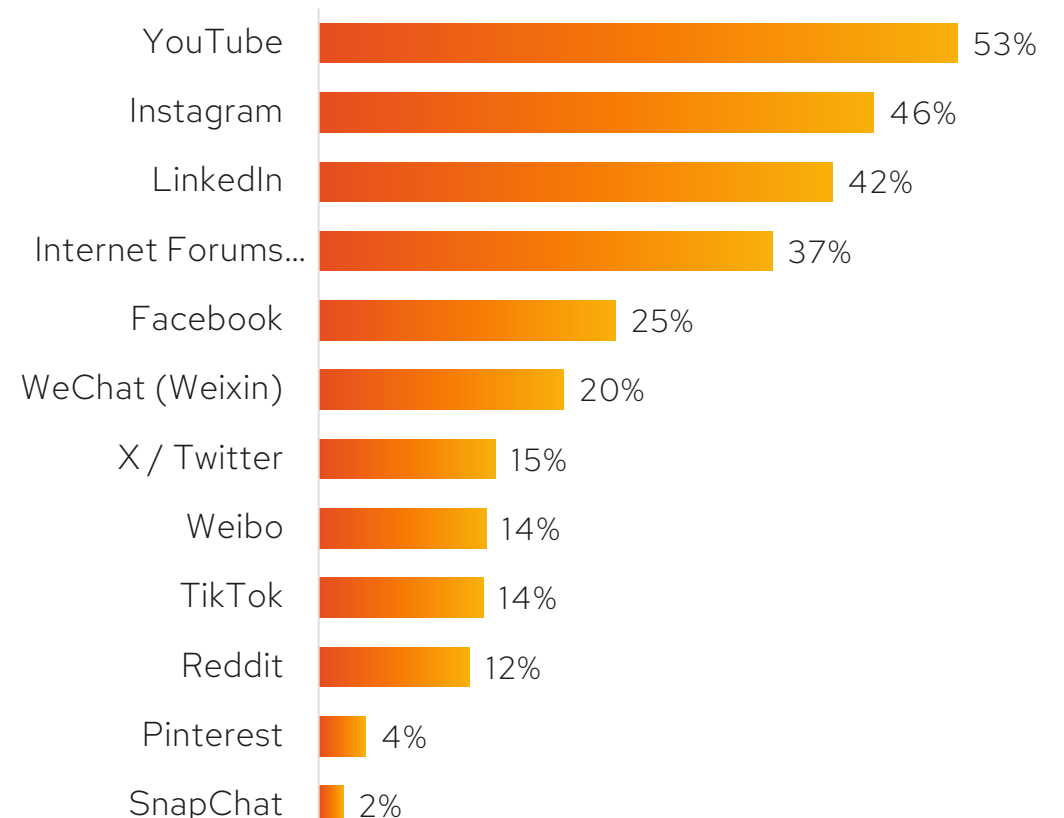
#1

YouTube is the most popular research platform – amongst all study levels

## Undergraduate



## Postgraduate



Source: QS International Student Survey 2024



# Instagram and YouTube are the only platforms widely used across all the major source markets for research into study decisions

Which of the following types of social media do you use for research when making decisions about studying overseas?

	China	India	USA	Nigeria	Pakistan
WeChat	1				
Instagram	2	3	2	5	3
Weibo	3				
YouTube	4	1	1	1	1
TikTok	5		5		
LinkedIn		2		2	4
Internet forums		4	3	3	5
Reddit		5	4		
Facebook				4	2

Source: QS International Student Survey 2024



## Key take-aways today



Growth must be diversified and sustainable to maintain financial stability.



Anticipate students' questions and concerns and remove the barriers you can control.



You're on the right channels, but is your content strategy still serving the right segments?



# Download your free copy of the 2024 Destination UK Report.

<https://www.qs.com/reports-whitepapers/destination-uk-report-international-student-survey-2024/>

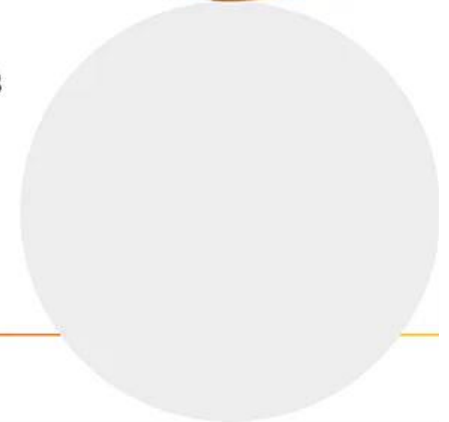


## Destination: UK

Discover the preferences  
and motivations of 68,353  
students looking to study  
at university in the UK

A report on the QS International  
Student Survey 2024

qs.com





## How to take part

### 2025 QS International Student Survey

- Scan the QR code now to register your interest
- QS Insights team will provide you with materials needed to take part
- Free to take part and all participating institutions receive a free benchmarking report detailing the results of their own candidates
- Fieldwork opens on 6th January 2025



**THANK YOU**

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