



International Student Survey

2018

Harnessing Opportunities in Global
Higher Education

www.qs-enrolmentsolutions.com

About the International Student Survey

The International Student Survey is the world’s largest survey of pre-enrolment for international and EU students.

The 2018 survey was conducted by QS Enrolment Solutions and ran from November 2017 to March 2018 with the participation of **67,172** students and **63** universities globally.

This report focuses on the responses provided by **22,838** prospective international students who identified that they are considering studying in the following European countries: Germany, the Netherlands, Sweden, France, Italy, Denmark, Austria, Hungary, Spain, the Czech Republic and Latvia.

Additional regional reports have been produced as part of this series, including reports focusing on the UK, and Australia & New Zealand.

For more information please visit www.internationalstudentsurvey.com

Key facts



Universities
63
participated
globally



Respondents
67,172
globally



Respondents
22,838
considering studying
in 11 EU countries
(DE, NL, SE, FR, IT, DK,
AT, HU, ES, CZ, LV)



Nationalities
193
represented

Respondent demographics:

Gender



59% male



41% female

Planned study level



29% undergraduate



67% postgraduate



4% other (incl. foundation and vocational)

Top subject areas



20% Business and Administration

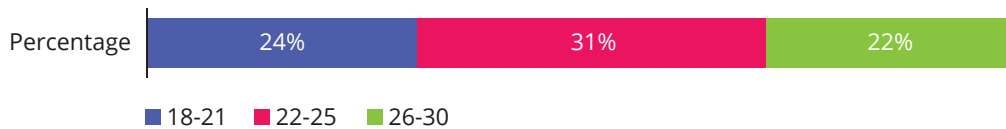


17% Engineering

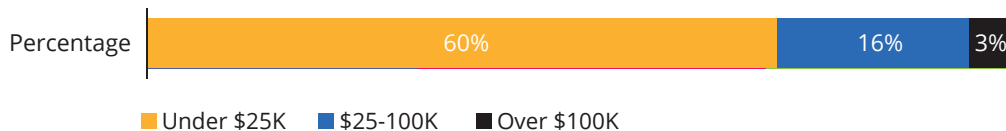


8% Social Studies

Top age groups



Top income groups



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Introduction from Andy Nicol, Managing Director, QS Enrolment Solutions



What does the future hold for the Higher Education sector across Europe? As global competition in Higher Education increases and the UK prepares to leave the European Union, this is a particularly pertinent question. The international students we surveyed expect the universities of tomorrow to offer a very different experience to the universities of today. A greater emphasis on digital delivery with lectures delivered online and students able to get a qualification from any university, regardless of which country they live in, were features of their vision of the future.

Through our annual International Student Survey, and our work to support international student recruitment, we have built up a significant amount of insight into the interests and behaviours of international students. As part of the sixth International Student Survey, we surveyed 67,172 prospective students from 191 different countries, 22,838 of whom were considering studying in the following European countries: Germany, the Netherlands, Sweden, France, Italy, Denmark, Austria, Hungary, Spain, the Czech Republic and Latvia. This report doesn't just cover the results of the survey, it also outlines recommendations to help countries from the EU adapt to the changing expectations of international students and harness the opportunities presented by the shifting global higher education market.

To ensure that Europe continues to be a leading destination for Higher Education, in an increasingly competitive global market, it is crucial that institutions listen to the views of prospective international students carefully, particularly in terms of what they expect the universities of the future to offer and move quickly to prepare for changing expectations.

At the same time as tackling challenges, this report also highlights how a greater focus on celebrating the quality of teaching provided could help European universities to attract more international students. Communicating the passion staff have for the subjects they teach and their 'real-world' experience beyond academia could have a major impact, as opposed to purely communicating their academic credentials.

International students are increasingly looking to country-wide measurements schemes such as the Teaching Excellence Framework in the UK as a way of judging quality. European markets should therefore consider introducing these at a national level as a way of opening themselves up to new groups of prospective students for whom teaching quality is their top priority.

Higher Education plays an important role economically and socially across the EU, helping to nurture generations to come. We believe that it is crucial that this continues and that international students remain drawn to European universities for world-class learning and research opportunities. Institutions that listen, adapt and differentiate their offer, while developing strategic approaches to international student recruitment, will harness the opportunities available within the global Higher Education market.

Recommendations

(1) European Universities should harness the opportunities presented by international students' expectations of the future of Higher Education.

International students expect universities of the future to offer a very different experience to universities of today. They envisage that there will be a greater emphasis on digital delivery with most lectures being online and students able to get a qualification from any university, regardless of which country they live in. Universities of the future are expected by many international students, to be part of continuous learning. International students indicated that they see a positive future for the Higher Education sector with more institutions and more people going to university. Institutions should consider these views carefully, and move quickly to prepare for changing expectations, ensuring that Europe continues to be a leading global destination for Higher Education.

Top five characteristics selected when asked about how the sector could be in 10 years' time

- i. Most lectures will be online
- ii. Students will be able to get a qualification from any university regardless of which country they live in
- iii. More people will go to university
- iv. Universities will be part of continuous learning
- v. There will be more universities

(2) European universities need to do more to celebrate and communicate the quality of teaching that they provide.

For international students, the biggest indicator of teaching quality is the university's teaching staff. In turn, the qualities that they judge an effective teacher by are having a passion for the subject that they teach, coupled with having 'real-world' experience outside the sphere of academia. To effectively attract international students, universities should highlight the passion their staff have for the subjects they teach, and how their 'real-world' experience can prepare prospective students for their career post-university.

(3) European policymakers should give greater consideration to the possibility of introducing country-wide measurement schemes to evaluate teaching quality in any given country.

International students are increasingly looking to country-wide measurement schemes as a way of judging teaching quality, like the Teaching Excellence Framework in the UK. European markets should consider introducing these at a national level as in doing so, they may open themselves up to new groups of prospective students for whom teaching quality is their top priority.

(4) European Universities should continue to develop strategic approaches to international student recruitment, harnessing the opportunities available within the global Higher Education market

From the priorities throughout the decision making process to communications preferences, the depth of insight the Higher Education sector has into how international students think has grown significantly during the past few years. Social media now forms a critical part of the decision making process for many prospective students. However, since channel preferences vary hugely by nationality, if universities want to have a social media presence, then they need to spread it across multiple services and platforms to maximise their potential reach. Institutions that listen, adapt and differentiate their offer, while developing strategic approaches (beyond the immediate academic intake) to international student recruitment, will harness the opportunities available within the global Higher Education market.

Section 1
– Harnessing the power of teaching quality

How do prospective international students judge teaching quality?

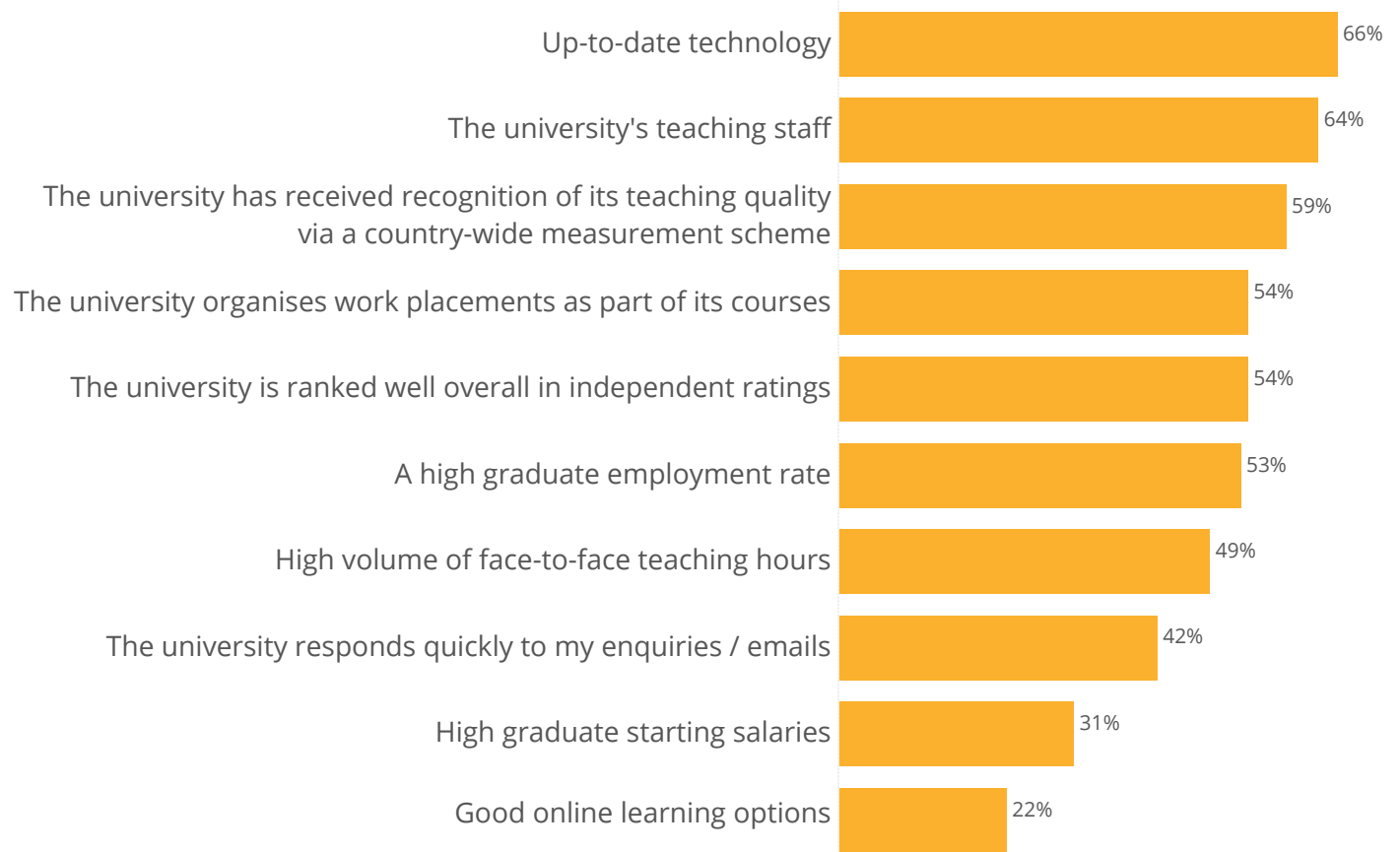
In previous iterations of the International Student Survey (ISS), we've highlighted that considerations around teaching quality are of the utmost importance for prospective international students choosing between different institutions.

Given that teaching quality is scrutinised throughout all stages of the decision making process, it's become increasingly important to track how prospective international students evaluate and assess teaching quality and whether the ways in which they do this is changing over time.

We asked prospective international students to identify the top five factors that they thought indicated that a university provides high quality teaching.

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

% of respondents placing each item in their top five



The biggest indicator of teaching quality having up-to-date technology, followed by the university's teaching staff. This echoes previous iterations of the ISS which suggests that prospective international students looking to study in Europe continue to place an emphasis on teaching staff above most other factors.

In the 2018 International Student Survey we added the option ‘The university has received recognition of its teaching quality via a country-wide measurement scheme’ to reflect the potential impact of initiatives like TEF (Teaching Excellence Framework) in the UK and QILT (Quality Indicators for Learning and Teaching) in Australia. The results show that prospective students consider performance in such country-wide measurement schemes as a bigger indicator of teaching quality than performing well in some forms of rankings and league tables.

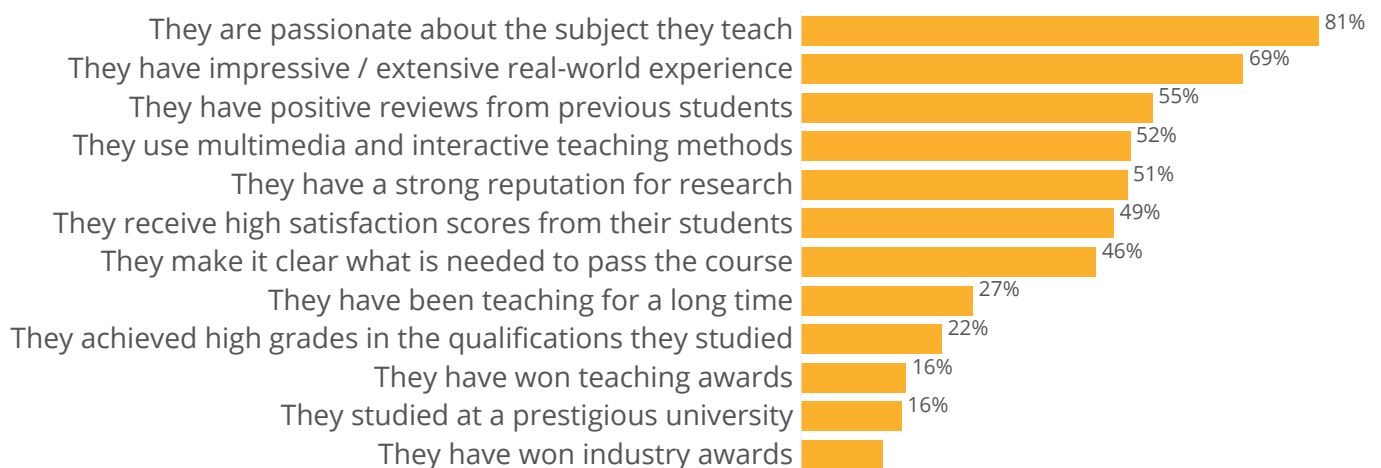
What do students really want from their teachers?

Given the importance of university staff when assessing teaching quality, we asked respondents which factors best demonstrated what they thought made a good quality lecturer or teacher.

What emerged was that the aspects which prospective students look for revolve more around the lecturer being able to effectively engage their students, getting positive feedback for doing so, and less around getting recognition in the form of awards or having studied at ‘prestigious’ universities.

Which five factors indicate to you that a teacher/lecturer provides good teaching quality?

% of respondents placing each item in their top five



According to the international students we surveyed, the top indicator of a good quality lecturer is that they are passionate about the subject they teach, followed by them having ‘real-world’ experience extending beyond academia. This may suggest that prospective students are looking for lecturers who can engage them effectively in the subject matter and help them apply the knowledge in a practical way for their future careers.

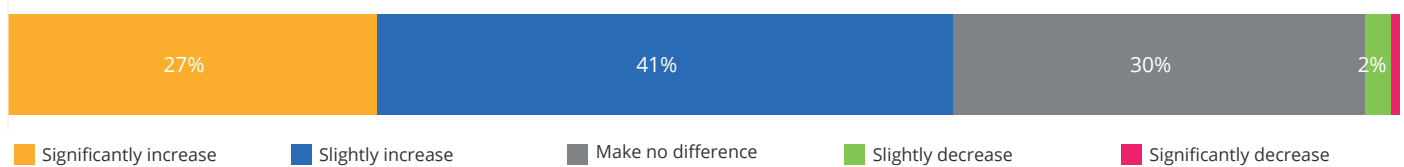
The third biggest indicator of teaching quality in a lecturer is receiving positive reviews from students. It is worth focusing on this, as it suggests that reviews from current students are likely to carry more weight than endorsements from other sources. One of the easiest ways for universities to respond to this is by communicating testimonials from current students, on the quality of teaching, through marketing materials and social media.

Having won teaching or industry awards is not seen as being important to prospective international students, nor is the knowledge that the lecturer has studied at a prestigious university. This finding, combined with our earlier results, suggests that students value ‘real-world’ experience over anything else.

To what extent would an equivalent of the UK’s Teaching Excellence Framework help EU universities to attract prospective students?

The introduction of the TEF in the UK has impacted significantly on the student decision making process. It’s continued expansion and evolution means it is now being considered to feed into a new rating system for degree courses in the UK. Given its relative success, we explored the potential advantage for other countries to introduce a similar scheme to enhance their attractiveness as a potential learning destination. Our research found that among prospective students, 68% claimed an equivalent of the TEF in other countries would increase the likelihood of them studying there, showing how much they value the ability to easily compare teaching quality between numerous institutions. This suggests that whilst the UK may be ahead of some other markets in developing a country wide measurement of teaching quality, there are potentially significant benefits for other countries if they chose to establish a similar scheme themselves.

If other countries had a teaching quality metric (like the UK’s TEF rating) that aims to help you compare teaching quality between universities, would that affect the likelihood of you studying in that country?



This figure is highest for prospective international students looking to study in **Germany and Sweden but is generally high amongst a number of European countries**. Given that many of these countries are key competitors to the UK when it comes to attracting international students there is a clear and identifiable opportunity here for these European markets.

If other countries had a teaching quality metric (like the UK's TEF rating) that aims to help you compare teaching quality between universities, would that affect the likelihood of you studying in that country?

% selecting 'significantly increase' or 'slightly increase' by nationality



The TEF is currently a unique selling point for UK institutions that achieve good ratings, however there are relatively few barriers for European markets looking to establish a similar scheme. It may be that in doing so, they are able to attract new groups of prospective international students who wouldn't otherwise have considered studying in those markets. Whilst the TEF has now been around for a year, it's not an unsurmountable head start to overcome for other markets.

In summary, greater focus should be placed on celebrating and communicating the quality of teaching provided at European universities, and greater consideration given to the potential for country wide measurement schemes for teaching quality

For international students, the biggest indicator of teaching quality is the university's teaching staff. To effectively attract international students, universities should highlight the passion their staff have for the subjects they teach, along with their 'real-world' experience extending beyond academia.

Section 2
– International student decision making

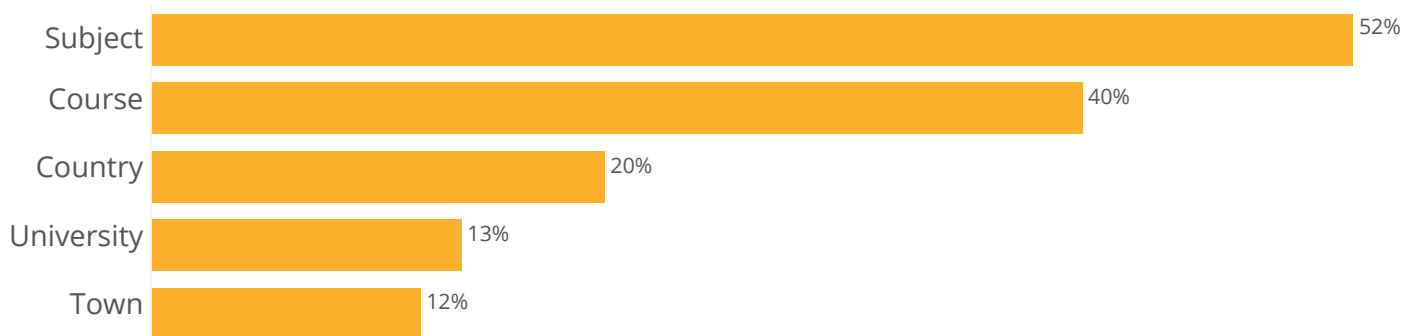
What is the order of decision making for prospective international students when applying to universities?

Across the European Union, universities are operating in an environment of ever increasing student mobility and are choosing to offer more English-language degrees. It is therefore important to better understand the process in which international students make decisions and what the decision making funnel looks like. This allows us to pinpoint the different priorities and information gathering habits of prospective students at each stage of the application process.

We asked respondents how much they had narrowed down their list of options on a range of different decision points. The chart below shows the typical order in which prospective international students decide on each element of the journey. It shows that typically, students first decide on the subject and course they want to study, before deciding on the country they want to study in, followed by the university and the town. Given that the differences between subject and course, and city and university are relatively minor, it's a fair assumption that these decision making processes are happening at the same time.

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

% who have decided on preferred option for stage to qualify for each subsequent stage, respondents must have first decided on previous stage

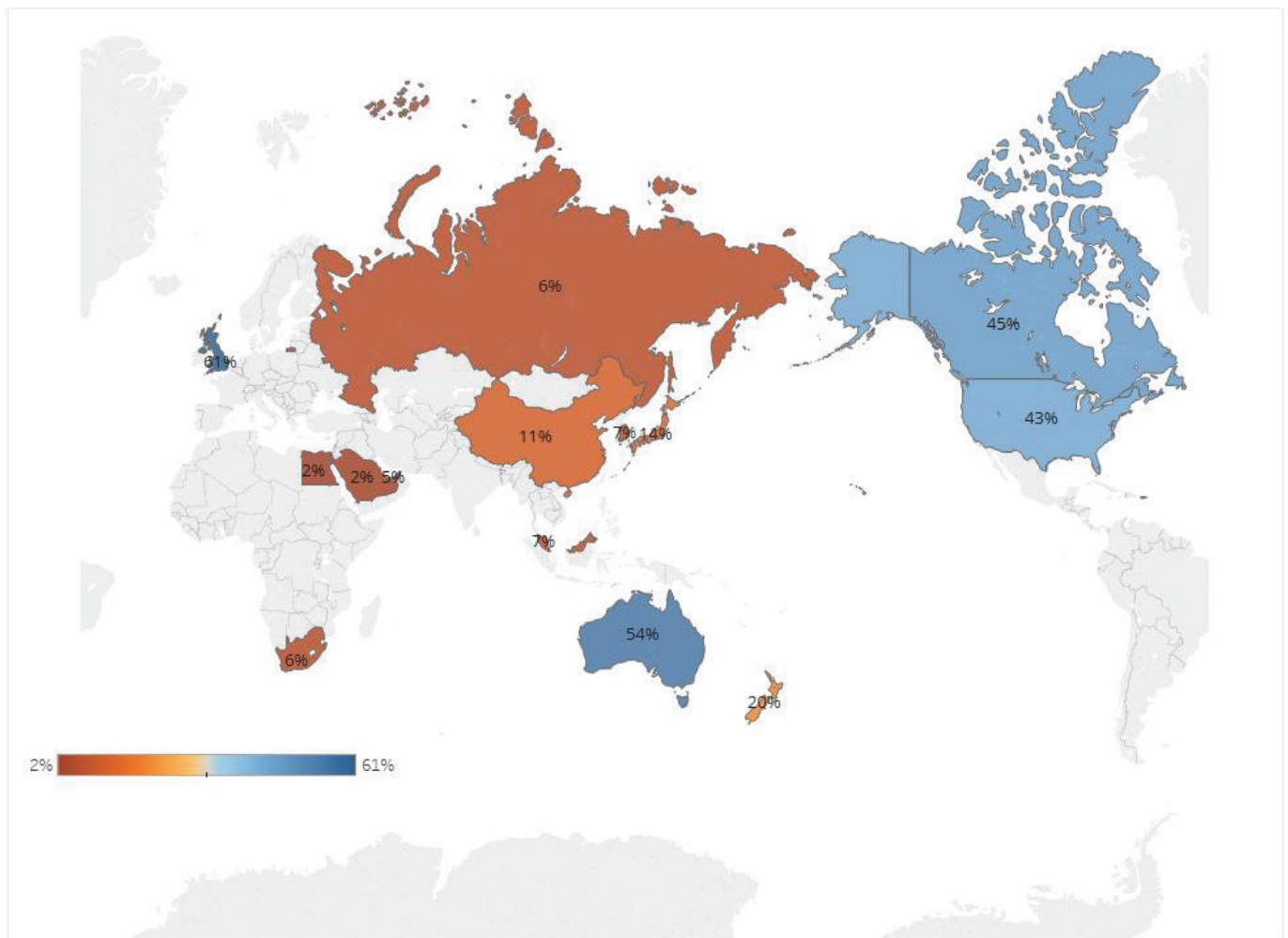


How many countries do they consider and does this correlate to the number of universities they apply to?

It's important to consider the other markets that European Universities are compared against. The most popular markets tend to be: the UK, Australia, Canada and the United States.

Where are you considering studying in the future?

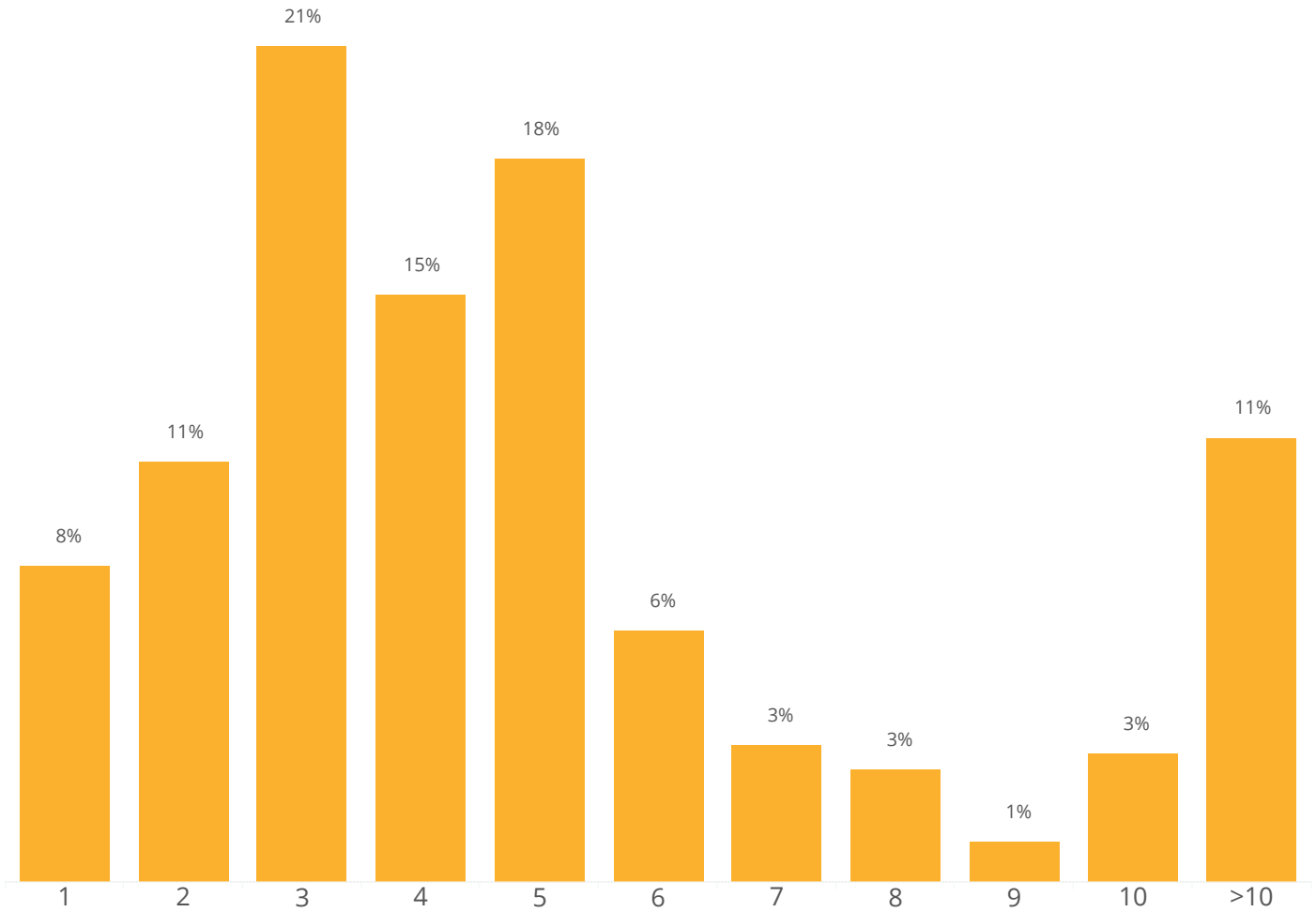
% selecting each country, high to low



There is also a direct correlation between the number of countries which they consider and the number of universities they enquire with or apply to. The vast majority (73%) will only consider five universities or less, this means that a significant proportion (27%) are considering applying to six or more universities underlining the increased competition European universities face from their global competitors.

How many universities are you considering applying to, or have you applied to?

Number of universities



It's also worth noting that regardless of how many universities a student is considering applying to, the same markets are consistently the most considered: Australia, Canada, United States and the UK.

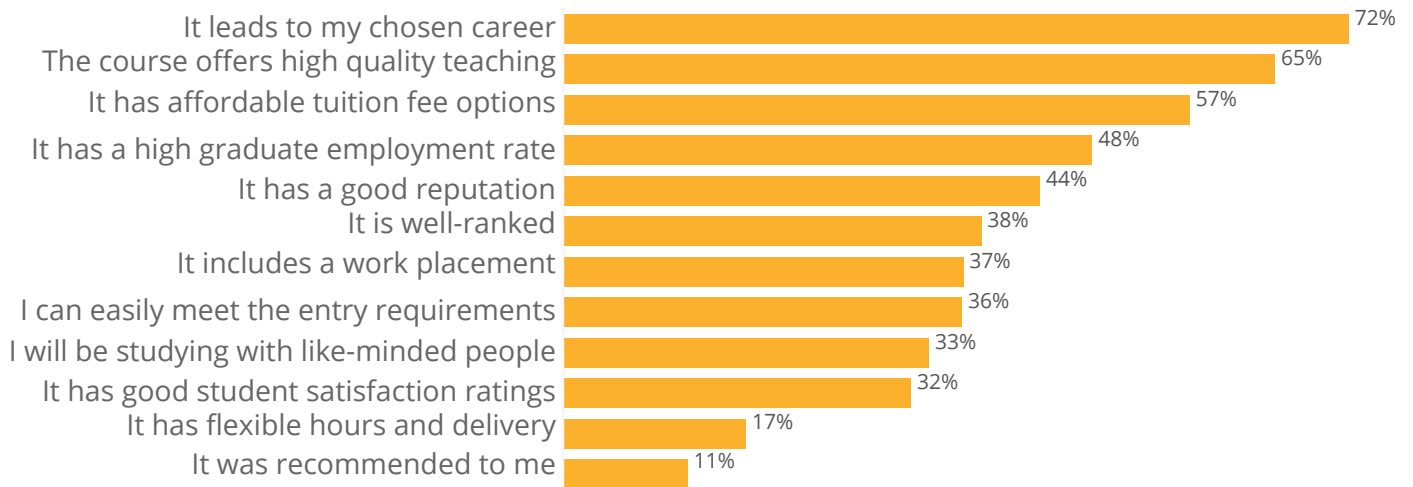
What factors are most important when choosing a course, country and university?

After establishing the order in which prospective international students make their decisions, we can now look at what factors that are most important at each stage.

We asked respondents what five things were most important when choosing a course and found that courses that lead to their chosen career emerged as the most important factor. This demonstrates that future career considerations take place right at the start of the application process for many students. This was followed by the course having high quality teaching, which echoes what we've seen in previous iterations of the ISS, that demonstrates teaching quality is one of the core factors which defines their choices at an early stage in the decision making funnel.

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

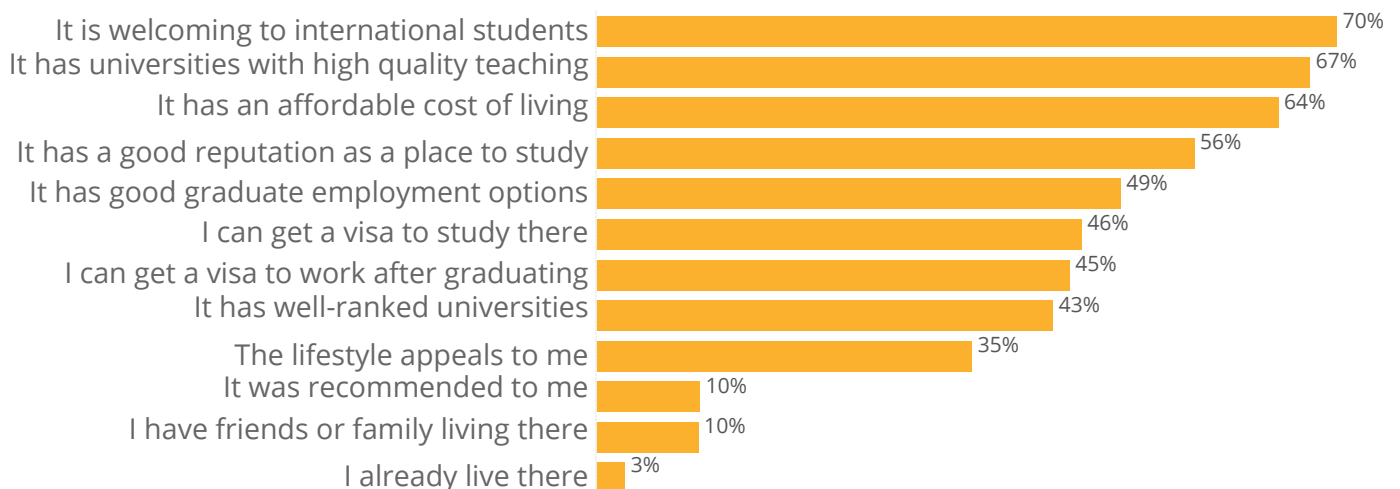
% of respondents placing each item in their top five



We asked respondents the same question when it came to the next stage of the decision making funnel, namely choosing a country to study in. Again, teaching quality emerged as one of the most important considerations when choosing a country. Whilst this further demonstrates its importance to prospective international students as a whole, it also reinforces the need for EU universities to promote their teaching quality credentials abroad. The most important consideration is that the destination country is seen to be welcoming to international students. Given the other markets which the EU is likely to be competing with, this reinforces the need for implementation of policies which actively try to attract international students. For example, Germany’s combination of high quality education and near zero tuition fees have made it one of the top destinations in Europe.

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

% of respondents placing each item in their top five



Finally, we asked respondents the same question with regards to their choice of university, where offering scholarships emerged as the most important factor. This sits in contrast to those looking to study in the UK where there is greater focus on teaching quality and is indicative of the comparatively lower cost of education offered in European universities compared to the UK.

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

% of respondents placing each item in their top five

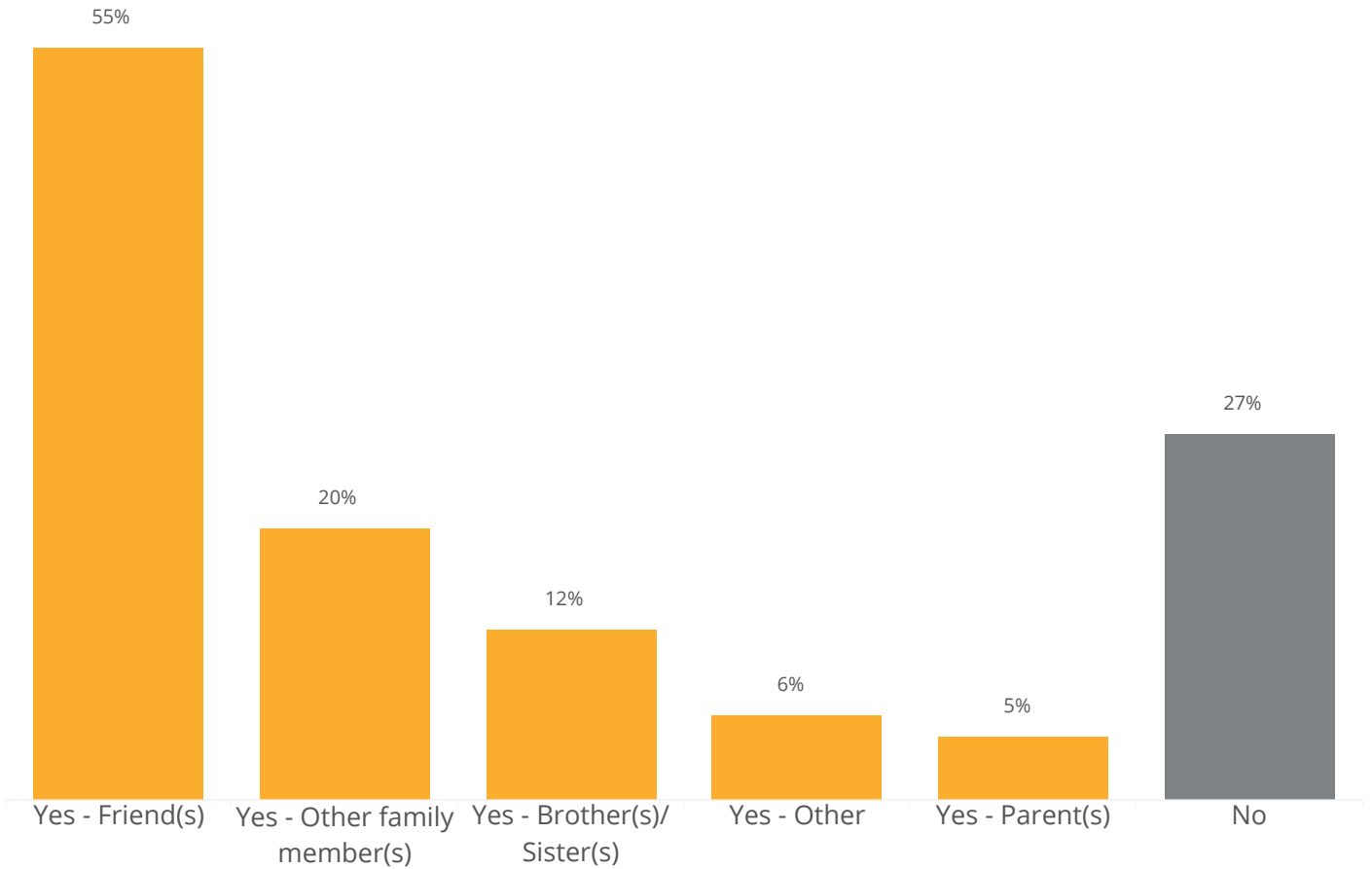


To what extent are prospective international students influenced by the experiences of family and friends?

Prospective international students can be influenced in their decision making by a range of different factors. Our work has highlighted how important the influence of friends and family are in the decision making process and that prospective international students are also highly likely to know someone who is also studying abroad in their chosen destination. These are potentially a hugely influential group and emphasise the need to utilise existing international students and global alumni networks as a recruitment channel and conversion tool.

73% of prospective international students know either a friend or family member who is or has studied abroad.

Do you have any friends or family that have previously or are currently studying as an international student?



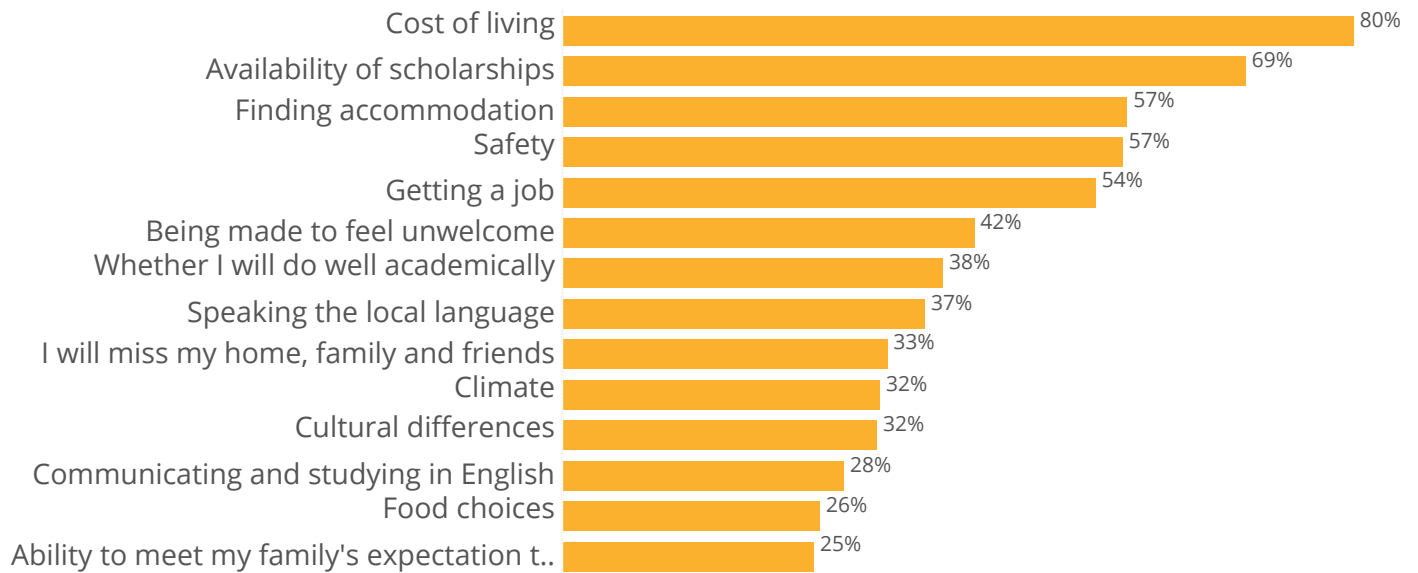
For the majority of prospective international students, their network of personal contacts has influenced them at some point of the decision making process. Over 60% have been influenced at some stage, with 45% of them claiming that the experience of friends and family has influenced their choice of country to study in. In future research, we will consider the kinds of experiences that shape these impressions whilst studying abroad and how universities can utilise these to better their overall impression.

What are the biggest concerns for prospective international students and what can be done to alleviate these concerns?

The biggest concerns prospective international students have about studying abroad are typically regarding affordability and include the cost of living and scholarships. However, what also emerges as a large concern for prospective students is that of safety. This relates to the importance that prospective students give to the idea that the country they're going to study in is welcoming to international students. This reinforces the need for EU universities to actively promote an image of being open and friendly towards international students, a practice successfully adopted by institutions in Canada and Australia.

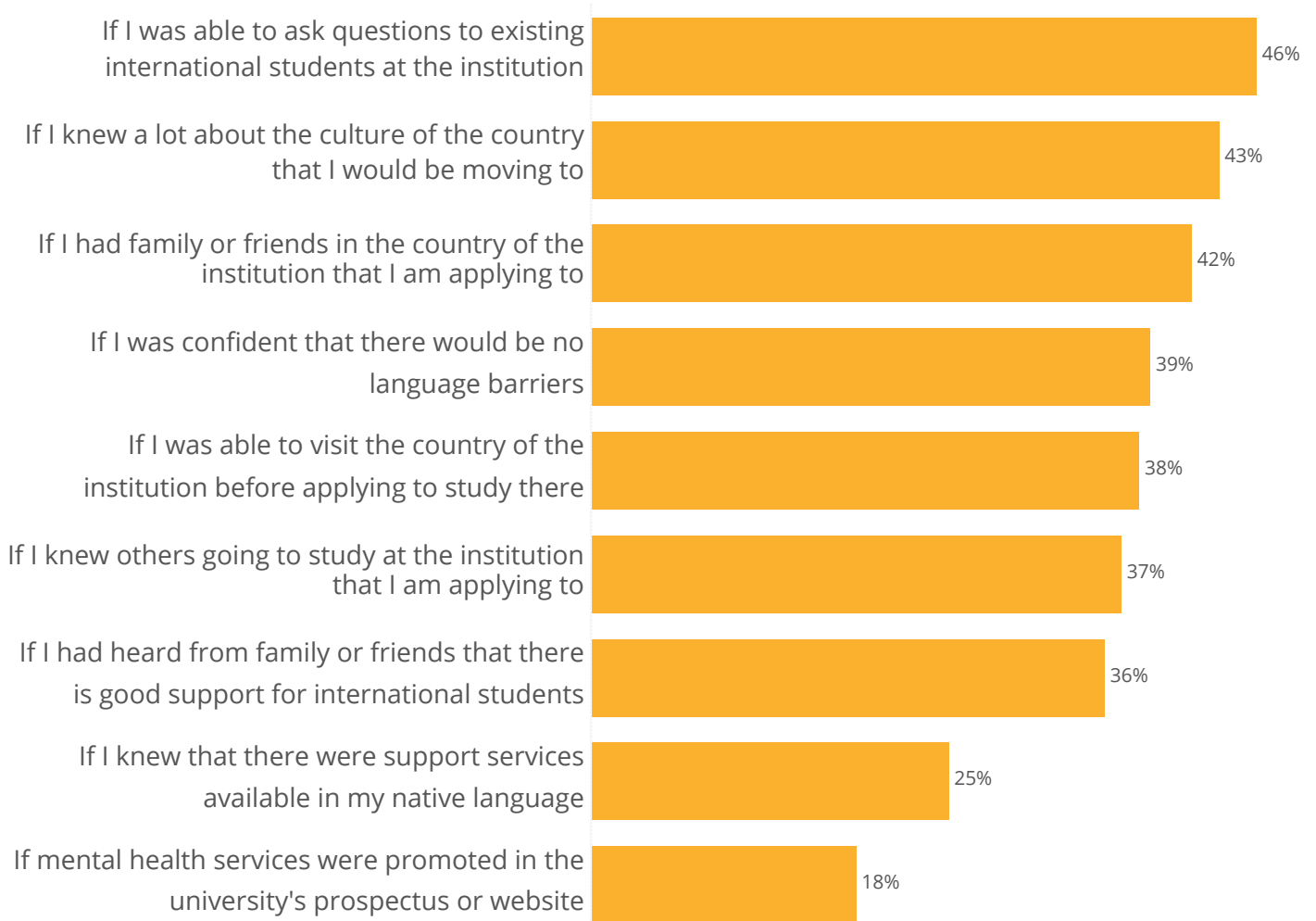
What worries you most about studying in a different country?

% of respondents selecting each option



We asked respondents what would help them to feel less worried about studying abroad. One of the most popular options which respondents selected was the ability for prospective students to ask questions to existing international students at the institution they were considering. This suggests that universities which are effectively able to link up current international students with prospective ones are likely to benefit from this.

Which is the following factors would make you feel less worried about studying abroad?



EU Universities should continue to develop strategic approaches to international student recruitment, harnessing the opportunities available within the global Higher Education market.

From perceptions of teaching quality to communications preferences, the depth of insight the Higher Education sector has into how international students think has grown significantly during the past few years. As the changing political and socio-economic dynamics influence the views of potential applicants, universities should continue to listen closely to international students. Institutions that listen, adapt and differentiate their offer, while developing strategic approaches to international student recruitment, will harness the opportunities available within the global Higher Education market.

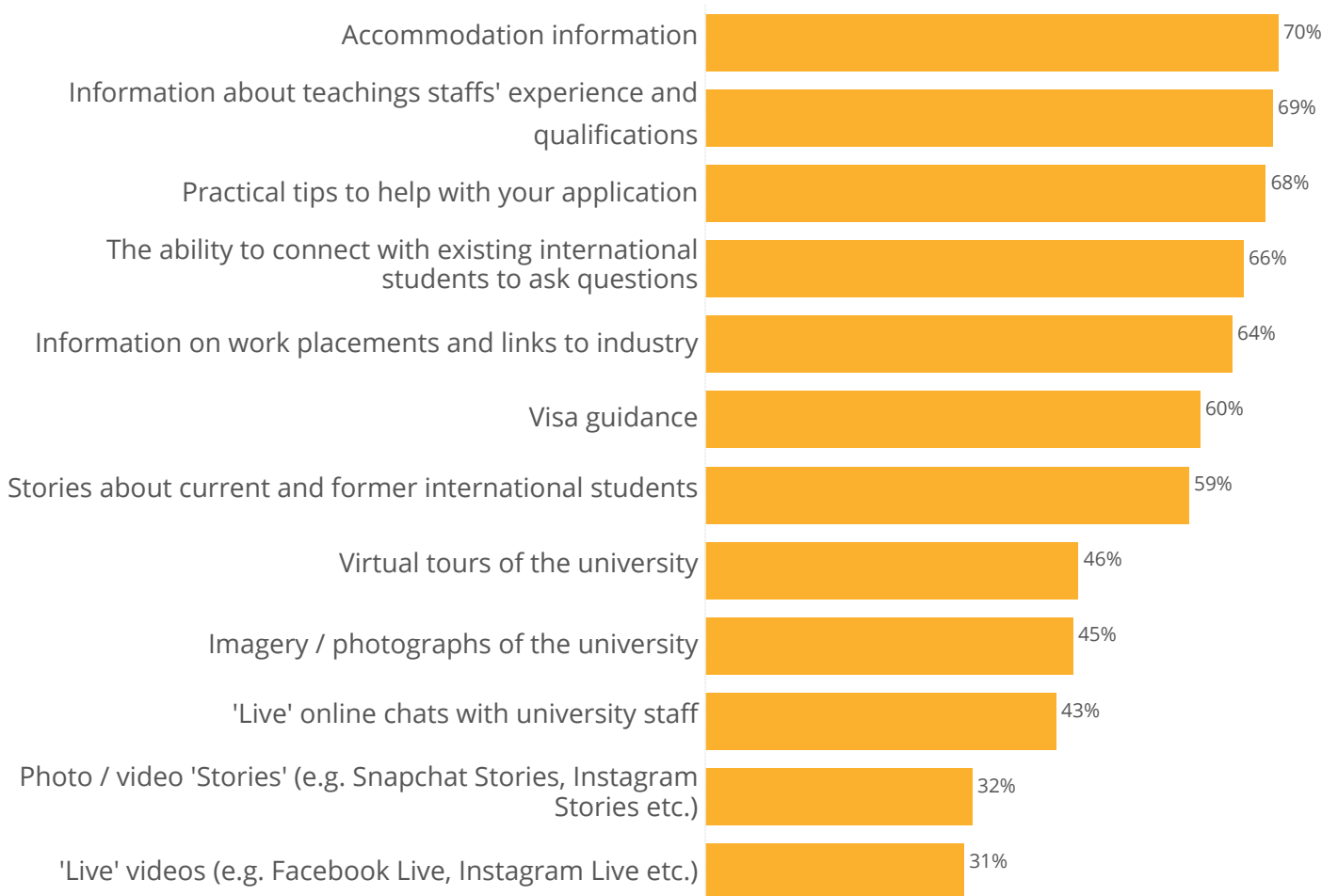
Section 3
– Communication preferences and digital channels

What are seen as the most influential marketing communications by prospective international students?

This year, we focused on the types of marketing that prospective international students want to see when they are choosing a university. We asked respondents which marketing communications have the most influence on them. Information about teaching staffs’ experience and qualifications emerged as one of the most influential marketing communications. This reflects their priorities throughout the decision making process and is consistent with our findings on teaching quality. Practical tips to help with their application also came through as being an influential marketing communication. Universities should utilise such information to build effective nurture campaigns that act to guide prospective students through the decision making process while alleviating concerns to maximise conversion to enrolment.

Which of the following marketing communications are influential in helping you to choose a university?

% of respondents selecting each option



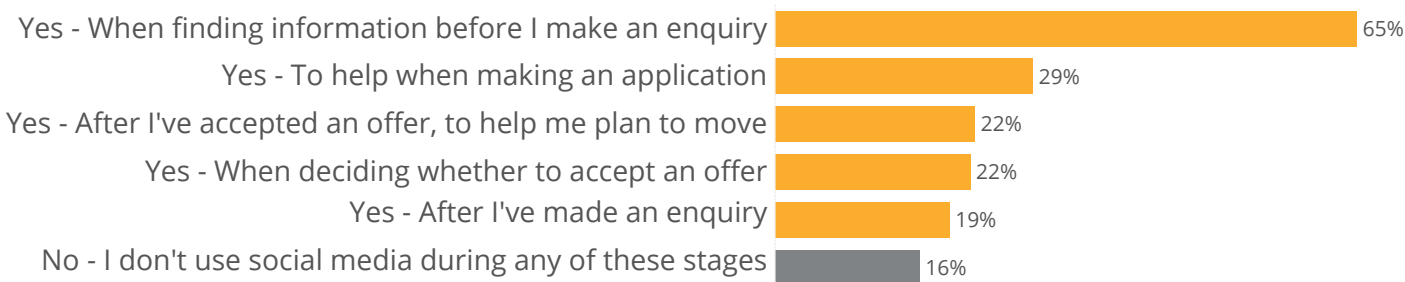
Accommodation information was the most desired marketing communication. This is unsurprising as it also relates to one of the biggest sources of worry for prospective international students. Finding accommodation was the third biggest cause for concern (behind safety, cost of living and availability of scholarships).

How many prospective students use social media as an information source when making decisions about studying?

In last year’s ISS (available to download at www.internationalstudentsurvey.com/2017), we highlighted that social media was (and still is) the principle medium by which prospective international students gather information and communicate with their peers. Internet access and use of social media have both continued to increase throughout 2017 so it’s important to see whether this is continuing to impact the decision making process for international students.

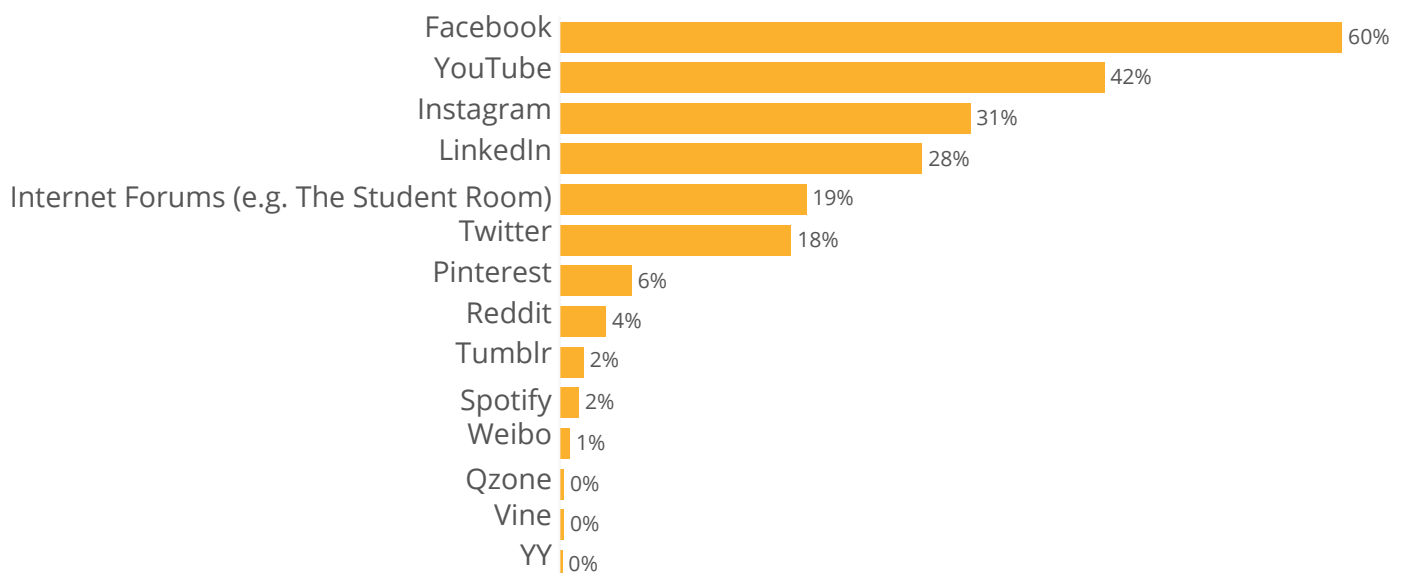
The proportion of those who used social media when applying to university was 84% in 2018. This is consistent with 2017’s figure and suggests use of social media in this sphere has stabilised (albeit at a very high level).

Do you use social media as part of the research process when deciding where to study?



This consistency in overall use is also reflected in the main social media channels used. This list tends to be dominated by Facebook, YouTube and Instagram.

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



However, there are subtle variances when splitting the data by market. Applicants from Bangladesh are most likely to use Facebook with 79% using it. YouTube is most likely to be used by applicants from Bangladesh, Kenya, Indonesia and India with scores of 52%, 51%, 50% and 49% respectively. 58% of Indonesian applicants use Instagram as do 43% of applicants from Australia. LinkedIn and Twitter are likely to be used by applicants from Kenya. One other factor to bear in mind is that Weibo and Qzone are also heavily used by Chinese applicants with 44% for Weibo and 6% for Qzone.

The considerable variance by market here suggests that if universities have a social media presence, then it would be best to have this spread across multiple services and platforms to reach the widest audience possible.

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

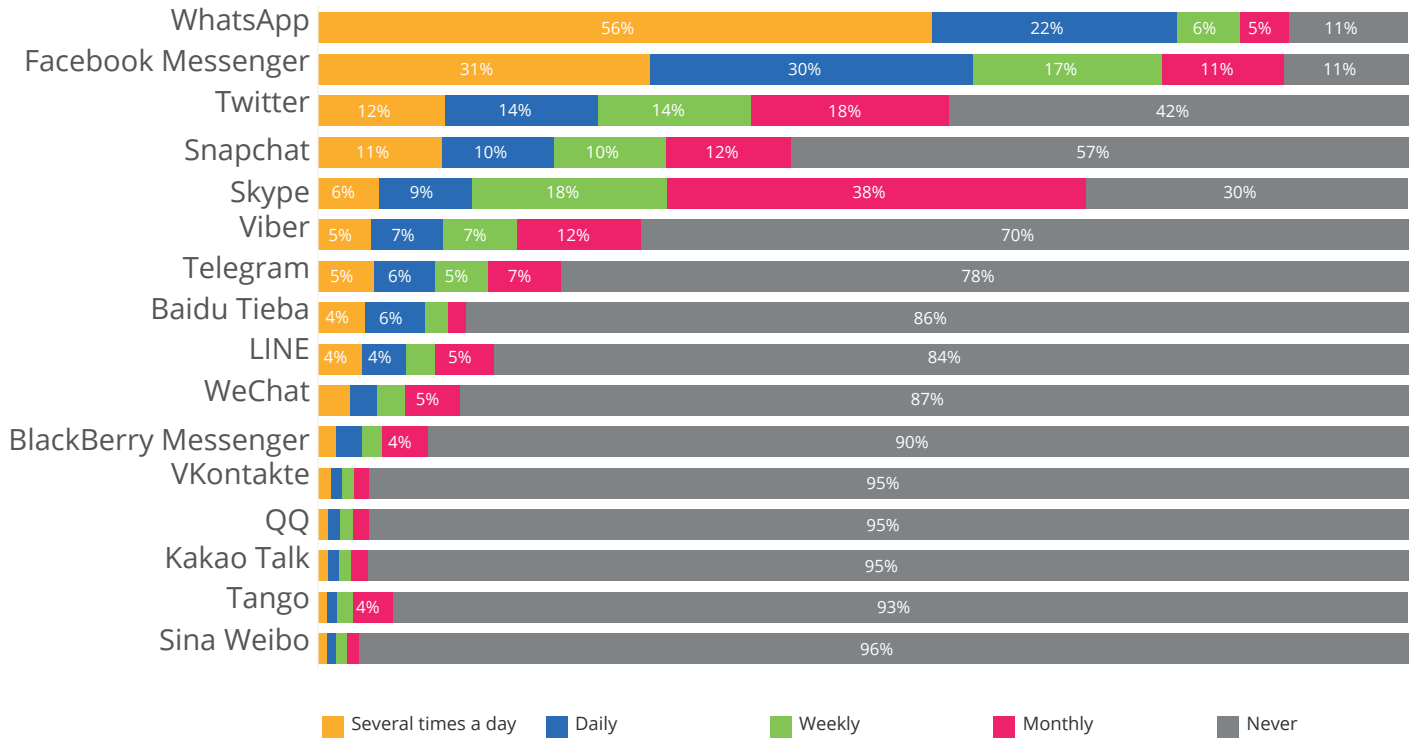
% selecting each channel by nationality

	Australia	Bangladesh	China	India	Indonesia	Kenya	Pakistan
Facebook	61%	79%	42%	62%	54%	56%	77%
YouTube	43%	52%	37%	49%	50%	51%	47%
Instagram	43%	22%	35%	35%	58%	26%	29%
LinkedIn	30%	35%	18%	40%	29%	39%	29%
Twitter	18%	19%	20%	18%	23%	35%	23%
Weibo	2%	1%	44%	0%	0%	0%	0%
Qzone	1%	1%	6%	1%	0%	1%	0%

Adding another layer to this, we can also look at specific social media messaging channels and where these are most popular.

In 2017's iteration of the ISS (available to download at www.internationalstudentsurvey.com/2017), the most widely used messaging channels were WhatsApp, Facebook Messenger and Twitter. This is still the case today, with these channels garnering high frequency use (daily or more frequent) of 78%, 61% and 26% respectively.

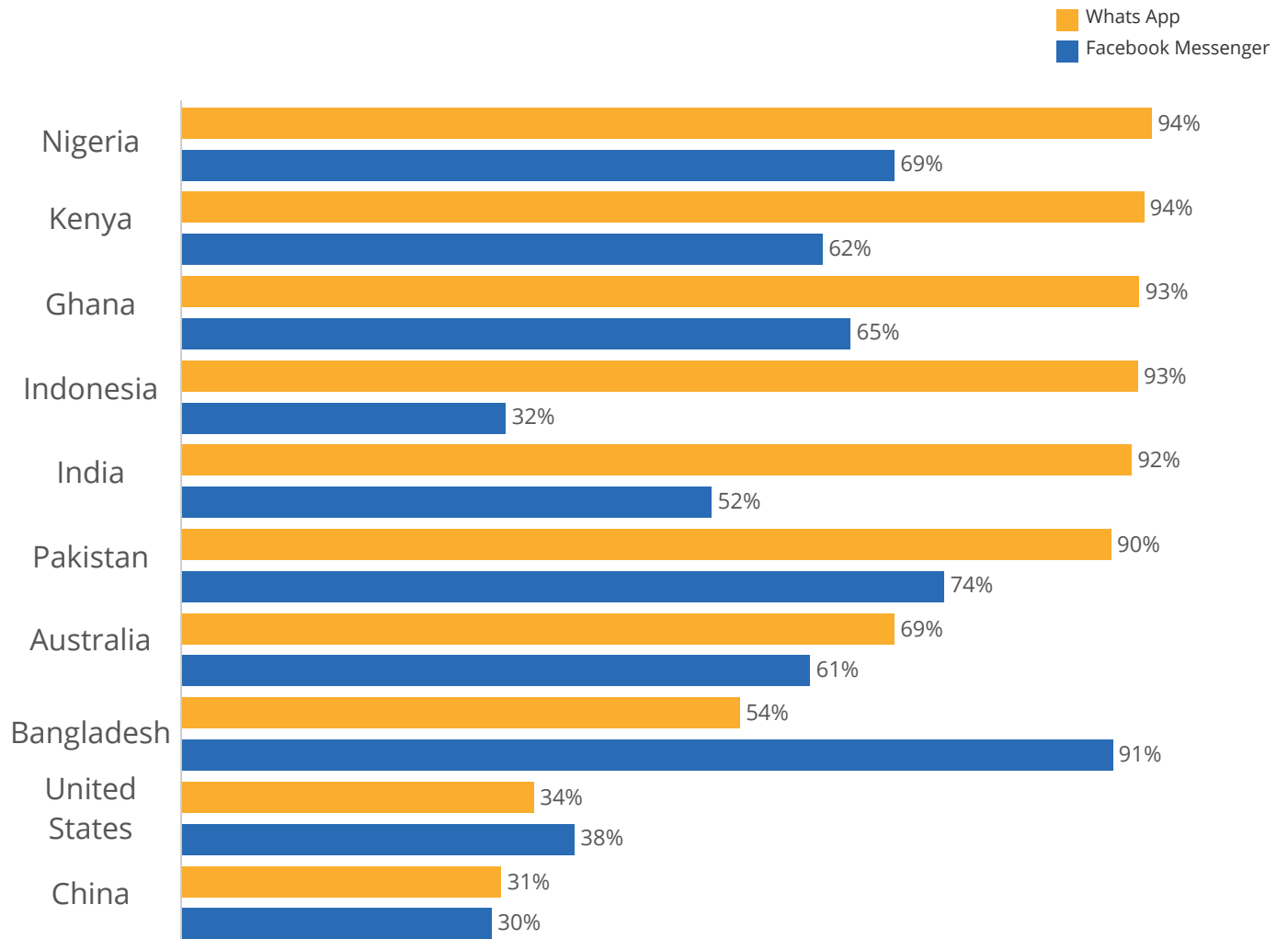
How often do you use the following social messaging services?



However, these overall usage levels only tell part of the story and there is considerable variation by nationality. For example, 94% of Kenyan respondents use WhatsApp daily compared to only 31% of Chinese respondents. High-frequency Facebook Messenger usage by respondents was most common in Bangladesh (91%) and Pakistan (74%). It was least common in China (30%), however as we'll go on to see, other messaging channels are far more prevalent in this market.

How often do you use the following social messaging services?

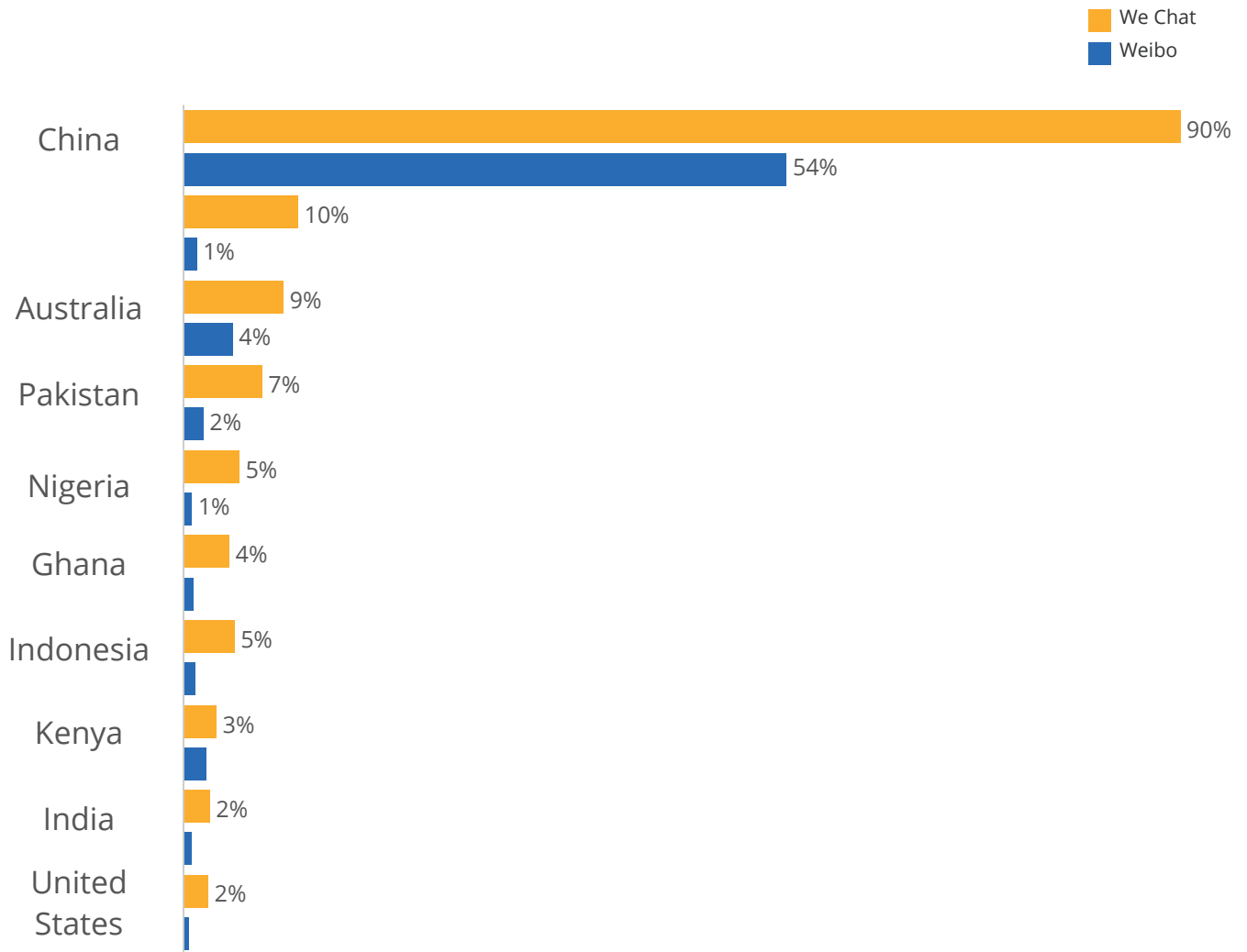
% using each social messaging service daily or several times a day



The most popular channels in China are WeChat and Weibo, with high frequency usage at 90% and 54% respectively.

How often do you use the following social messaging services?

% using each social messaging service daily or several times a day



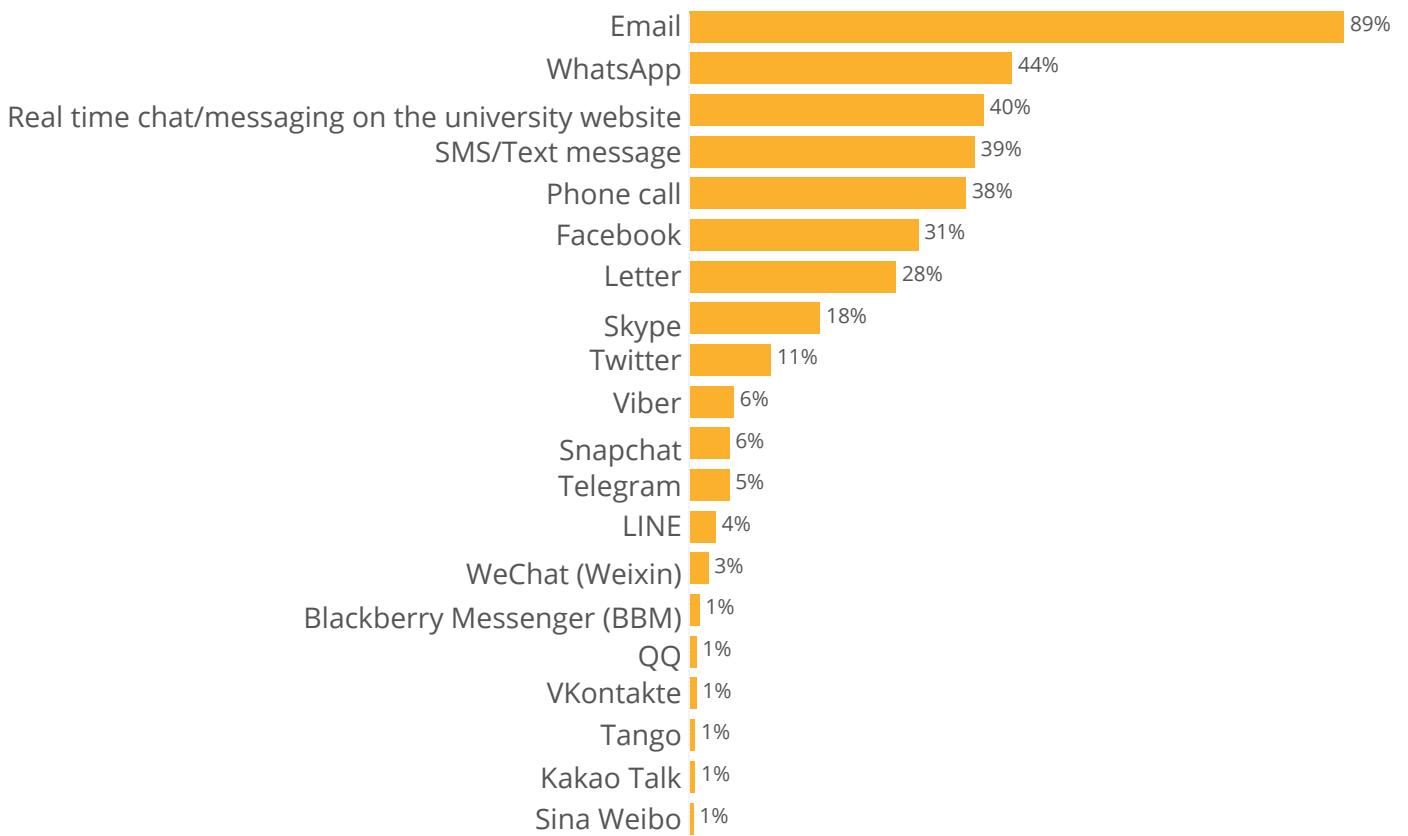
How do prospective students like to communicate with universities?

It's important to consider how prospective international students want to communicate with universities, given that their use of social media is so prevalent. We've found that universities need to adopt a holistic approach which incorporates traditional communications channels as well as social media.

We asked respondents which channels they'd like to use to communicate with universities. 89% claim that they'd like to use email, which suggests it's still the preferred default channel for a number of prospective students. Other traditional communication channels such as phone and SMS also received relatively high scores with 38% and 39% respectively claiming that they'd like to use these to communicate with universities.

Nevertheless, a sizeable minority are open to using social media. 44% claim they would like to use WhatsApp to communicate with universities, whilst 40% would be interested in using real-time chat on a university's website.

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



These figures show that there is appetite from prospective international students to use social media when communicating with universities. It also suggests that universities shouldn't be too hesitant to trial these channels as they can be a powerful tool in influencing the decision making process. However, it's also important to acknowledge that this shouldn't come at the expense of their core channels, as for many, email remains the preferred channel they will use to communicate with universities.

Section 4

– The opportunities presented by the future of Higher Education

What do students think will happen to universities over the next decade?

What does the future hold for the European Higher Education sector? At a time when the sector faces a number of challenges, from increased global competition to the impacts of international migration flows, looking to the future is vital for universities to continue to thrive. To provide insight into the expectations of international students we gave respondents a number of scenarios, from “more people will go to university” to “degrees will be shorter in length” and asked which of the scenarios they think will be true when they think ahead to 2028.

It is clear that the international students we surveyed expect the universities of tomorrow to offer a very different experience to the universities of today. The top three overall scenarios that they think will come true are that most lectures will be online, students will be able to get a qualification from any university regardless of which country they live in, and more people will go to university.

Interestingly within the EU, Greece and Poland are the markets driving the impression that lectures will be delivered digitally and that students will be able to get a qualification regardless of country of origin. Outside of the EU, the core markets driving these expectations are predominantly from African markets such as Ghana, Kenya, Nigeria, Tanzania and Uganda.

The overall findings suggest that international students see a positive future for the Higher Education sector with more institutions and more people going to university. Institutions should consider these views carefully and prepare for changing expectations.

Top three future trends predicted by international students



1

Most lectures will be online



2 Students will be able to get a qualification from any university regardless of which country they live in

3

More people will go to university



Top three future trends by nationality



Most lectures will be online

Top 3 Non-EU

Top 3 EU



Uganda

◀ 1 ▶



Greece



Kenya

◀ 2 ▶



Ireland



Tanzania

◀ 3 ▶



Poland



Students will be able to get a qualification from any university regardless of which country they live in

Top 3 Non-EU

Top 3 EU



Uganda

◀ 1 ▶



Bulgaria



Nigeria

◀ 2 ▶



Greece



Ghana

◀ 3 ▶



Poland



More people will go to university

Top 3 Non-EU

Top 3 EU



Tanzania

◀ 1 ▶



Ireland



Kenya

◀ 2 ▶



Germany



Brazil

◀ 3 ▶



Netherlands

European universities should harness the opportunities presented by international students' expectations of the future of Higher Education

International students expect universities of the future to offer a very different experience to the universities of today. They envisaged that there will be a greater emphasis on digital delivery with most lectures being online and students able to get a qualification from any university, regardless of which country they live in. International students indicated that they see a positive future for the Higher Education sector with more institutions and more people going to university. Institutions should consider these views carefully, and move quickly to prepare for changing expectations, ensuring the EU continues to be a leading global destination for Higher Education.

About QS Enrolment Solutions

QS Enrolment Solutions is a global market leader for research and understanding of international and domestic students.

Each year we deal with hundreds of thousands of students globally, giving us a unique insight into the student recruitment market. Our research, strategy, enquiry, admissions and enrolment services mean we have hands-on experience of the obstacles and opportunities within specific countries and regions, helping clients mitigate risk, benefit from our existing relationships, and build sustainable recruitment strategies in an increasingly complex marketplace.

For more information please contact:

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About the International Student Survey 2018

The QS Enrolment Solutions (QSES) International Student Survey is an online survey of prospective international students who have made an enquiry to a participating university within the previous 12 months.

In 2018, 63 universities participated from around the world.

For more information on this research please contact:

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All information contained in this report is believed to be correct and unbiased, but the publisher does not accept any responsibility for any loss arising from decisions made upon this information.

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Participate in the International Student Survey

Each year, QS Enrolment Solutions enables institutions to take part in the International Student Survey research free of charge.

Your participation helps ensure the research remains robust and representative of the market. And as a thank you, we will produce a benchmarking report specific to your institution, showing how your prospective international students compare against the rest of the market, offering useful insight that enables you to better attract international students.

To register your interest visit:

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Thank you