International applicants in the Covid-era: 2021 and beyond

Edward Harcourt, Ph.D.
Senior Vice President & Managing Director, QS
Edward.Harcourt@qs.com
QS – 30 Years of Market Leading Solutions for Higher Education

#1 player in HE Rankings

#1 player in Higher Education Student Recruitment events

#1 player in Higher Education Online Portals

#1 Outsourced enrolment solutions provider

#1 dedicated higher education research house - QS Intelligence Unit

Regional Conferences and branding solutions

Mobility, Partnership & Application Software –

>1,500 Global Higher Education Clients
>250k Students Connected per Annum
Today’s insights:

- Quick introduction to QS’ surveys
- Perceptions of the US
- Coronavirus vaccines
- Mental health and wellbeing
- Using machine learning and predictive analytics for student recruitment
Coronavirus Research

- Started in February 2020
- Received over 130,000 responses in total from 183 countries
- Examines changing attitudes and study intentions throughout the pandemic
- Produced over 20 reports and webinars over the last year
International Student Survey

• Now in its ninth year
• Received over 105,000 responses in 2021, including 34,484 interested in the US
• 320 US universities took part
• Responses by nationality are weighted proportionally based on previous HESA data
• 27% Undergraduate, 72% Postgraduate, 1% Foundational or Vocational
Changing Perceptions of the US
What proportion of prospective international students believe that the US has become ‘more’ or ‘much more’ welcoming to students from their country in the last year?

A) Greater than 50%  
B) Less than 50%
What proportion of prospective international students believe that the US has become ‘more’ or ‘much more’ welcoming to students from their country in the last year?

A) Greater than 50%  
B) Less than 50%

58% of prospective international combined think that the US is becoming ‘more’ or ‘much more’ welcoming to students from their country.
How has positive sentiment towards the US grown in core recruitment markets?
How has positive sentiment towards the US grown in core recruitment markets?
“I'd like to study in one of the most powerful countries in the world, for the advanced technology and freedom that comes with that.”

Prospective student from China
“I'd like to study in one of the most powerful countries in the world, for the advanced technology and freedom that comes with that.”
Prospective student from China

“I’d like to network with diverse people from different backgrounds coming together to share ideas.”
Prospective student from Canada
“I'd like to study in one of the most powerful countries in the world, for the advanced technology and freedom that comes with that.”
Prospective student from China

“I’d like to network with diverse people from different backgrounds coming together to share ideas.”
Prospective student from Canada

“As an engineering graduate, all of the cutting edge tech research is happening in US universities. I want to be a part of those research opportunities.”
Prospective student from Bangladesh
Which countries have handled the coronavirus pandemic and vaccination rollout best?

<table>
<thead>
<tr>
<th></th>
<th>% of students saying country handled the pandemic ‘very well’ or ‘fairly well’. N =4,740</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Handled pandemic best</strong></td>
<td></td>
</tr>
<tr>
<td>1 New Zealand</td>
<td>76%</td>
</tr>
<tr>
<td>2 Canada</td>
<td>72%</td>
</tr>
<tr>
<td>3 Australia</td>
<td>69%</td>
</tr>
<tr>
<td>4 Germany</td>
<td>65%</td>
</tr>
<tr>
<td>5 US</td>
<td>23%</td>
</tr>
</tbody>
</table>

* % of students saying country handled the pandemic ‘very well’ or ‘fairly well’. N =4,740
Which countries have handled the coronavirus pandemic and vaccination rollout best?

<table>
<thead>
<tr>
<th>Handled pandemic best</th>
<th>Managed vaccination best</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> New Zealand</td>
<td><strong>1</strong> US</td>
</tr>
<tr>
<td>76%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>2</strong> Canada</td>
<td><strong>2</strong> India</td>
</tr>
<tr>
<td>72%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>3</strong> Australia</td>
<td><strong>3</strong> UK</td>
</tr>
<tr>
<td>69%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>4</strong> Germany</td>
<td><strong>4</strong> Israel</td>
</tr>
<tr>
<td>65%</td>
<td>10%</td>
</tr>
<tr>
<td><strong>5</strong> US</td>
<td><strong>5</strong> New Zealand</td>
</tr>
<tr>
<td>23%</td>
<td>8%</td>
</tr>
</tbody>
</table>

* % of students saying country handled the pandemic ‘very well’ or ‘fairly well’. N = 4,740
Coronavirus and destination country choice

- 55% of respondents said that the way a government has managed the pandemic has made them reconsider their choice of study destination
- 72% of respondents felt the US had not handled the pandemic well
- The link between having managed the pandemic well and student recruitment is complex, as having closed borders (while seen as effective in managing the virus) also sends a signal of a country being ‘less welcoming’ to international students

N = 3,617
Predictive Analytics and International Recruitment
“Predictive analytics encompasses a variety of statistical techniques from data mining, predictive modelling, and machine learning that analyse current and historical facts to make predictions about future or otherwise unknown events.”

Wikipedia
Combines over 200 data points including:

- Demographics – age, course, campus, current location etc.
- Online response metrics – email open rates, click rates, pages viewed etc.
- Behavioural metrics – willingness to engage, which channel, speed, frequency etc.

Plus multiple other data sources that act as indicative predictors of a future application or enrolment
How Machine Learning Optimizes Offer Holder Outcomes

- **Input data**: Data team inputs historic and aggregate offer data into model.
- **Run models**: QS Models are built continually learn and optimize using big data.
- **Prioritise calls**: QS Models remove manual effort needed to assess outcomes.
- **Conversion completed**: Contact all offer holders and prioritise those higher likelihood.
The results:

- China average conversion rate for non-Machine Learning cohort in S2 2020 was 9%, with machine learning this increased to 27% - 3x better
- Pakistan non-ML average was 4% and ML achieved 20% - 5x better
- Vietnam non-ML average was 21% and ML achieved 37% - 1.7x better
- Singapore non-ML average was 14% and ML achieved 28% - 2x better

Thank you

To request:
• A copy of this presentation
• Recent coronavirus reports
• The upcoming International Student Survey report
• Or more information on machine learning and predictive analytics

Please email Edward.harcourt@qs.com