



# Applicant Survey 2018

What Drives an  
International Student Today?



## CONTRIBUTORS

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Graphic designer Georgia Philippou creates innovative infographics and visualizations based on QS's research and rankings. Her work is featured on TopUniversities.com and TopMBA.com, and across the company's social media channels. Georgia is the lead designer for a range of print and online publications, including a popular range of guides for prospective students, as well as market research reports for higher education professionals.

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## INTRODUCTION

The 2018 QS Applicant Survey Report, published annually, aims to locate university applicant motivations and study decisions in the contemporary political and economic context. Divergences in candidate decision-making are often linked to the cultural, economic and social underpinnings of where they are from. This insight can help universities understand which destinations and subject choices are preferred by students depending on their region of origin, study level and gender. The report examines applicant priorities in relation to institution choice, study destinations and desired graduate skills.

This year's results are likely to have been somewhat influenced by significant political changes in the two biggest host destinations: the US and the UK. Restricted freedom of movement and immigration control featured in both of these events. Britain's vote to exit the European Union preceded President Donald Trump's promise to impose a travel ban on people from Muslim-majority nations entering the US. Thus, for those seeking an international student experience in the two most-popular host markets, uncertainty about unwelcoming attitudes, fees, visa restrictions and post-study work opportunities have arisen worldwide. Meanwhile, emerging markets in Asia Pacific, Latin America, and Africa and the Middle East, are increasing the capacity of their higher education (HE) systems, to attract international students, encourage student exchange and boost economic growth. Last year's Applicant Survey Report, 'Emerging Markets', indicated this investment has also signaled growing demand, and therefore value, in the international education experience. Projections for rising tertiary-aged population (18-22-year-olds), in Asia Pacific and Africa will not only influence student mobility patterns over the coming decades, but ensure increased demand in HE overall.

Student mobility is therefore likely on the precipice of transformation. Whilst international student movement has traditionally streamed from East to West, recent global developments have initiated a shift towards a much more reciprocal flow. The advancement of HE in the East will coincide with technology expanding the range and scope of HE in the West. This year's survey results certainly expose the continued investment in studying abroad, and although the US and UK remain the top destinations overall, Canada and Australia are increasingly growing in popularity, especially among applicants in the Middle East. Countries in Western Europe are climbing in the top destination rankings by region, whilst applicants from the US and Canada are consistently showing greater interest in countries within Asia Pacific.

The data shared is based on responses to the QS Applicant Survey in the 2016-2017 academic year. A total of 16,560 responses were collected during this period. Of those surveyed, 6,715 are applicants interested in undergraduate (UG) studies, 6,606 interested in master's courses, and 1,366 interested in obtaining a PhD. UG applicants were included in the survey for the first time this year, adding enhanced insight and depth to our findings. As the global number of students enrolled in HE is projected to more than double to 262 million by 2025, the inclusion of student preferences of all levels becomes increasingly important.

## KEY FINDINGS

- **The US and the UK remain the top study destinations**, ranking first and second respectively. This shows that despite political uncertainties, the prestige of institutions in these countries just about outweighs concerns about visas, opportunities to stay and work, and feeling unwelcome. However, Canada is rising in popularity as an alternative study destination.
- Preferred study destinations for students in Africa and the Middle East are now much more varied, with the US having a weaker hold in the region. For example, **Canada is now replacing the UK** as the second most-popular target destination for applicants from this region.
- **Applicants are increasingly concerned with developing collaborative and transferable skills** such as problem solving, teamwork and communication, for employment. Skills such as teamwork and creativity are ranked higher than the more traditionally-favored skills like business acumen, numeracy and confidence.
- **Funding remains the leading factor for all applicants when choosing an institution.** 70% of PhD applicants, 60% of master's applicants and 57% of undergraduates consider funding available to study a program the leading factor when choosing an institution.
- **Applicants are increasingly prioritizing progressing to higher qualifications as a key motivation for studying.** Among master's applicants, the most popular reason for pursuing their chosen program was to progress to a higher-level qualification. This trend shows that an increasing share of applicants believe a single degree will no longer be enough to secure employment, possibly hinting at inflation of the value of a degree.
- **Latin American applicants place a greater importance on exchange opportunities than students from other regions.** This could be linked to the lack of international links and recognition among Latin American universities, as partly shown by the fact that only six Latin American universities feature in the top 200 of the [QS World University Rankings® 2018](#).

## UNDERGRADUATE MOTIVATIONS

Prospective undergraduate (UG) motivations, included here for the first time, provide insight not available in previous QS Applicant Survey reports. Survey participants were given a multiple-choice question to share their motivations for applying to university. Their answers were then broken down by region and subject choice, so that patterns could be identified in the data.

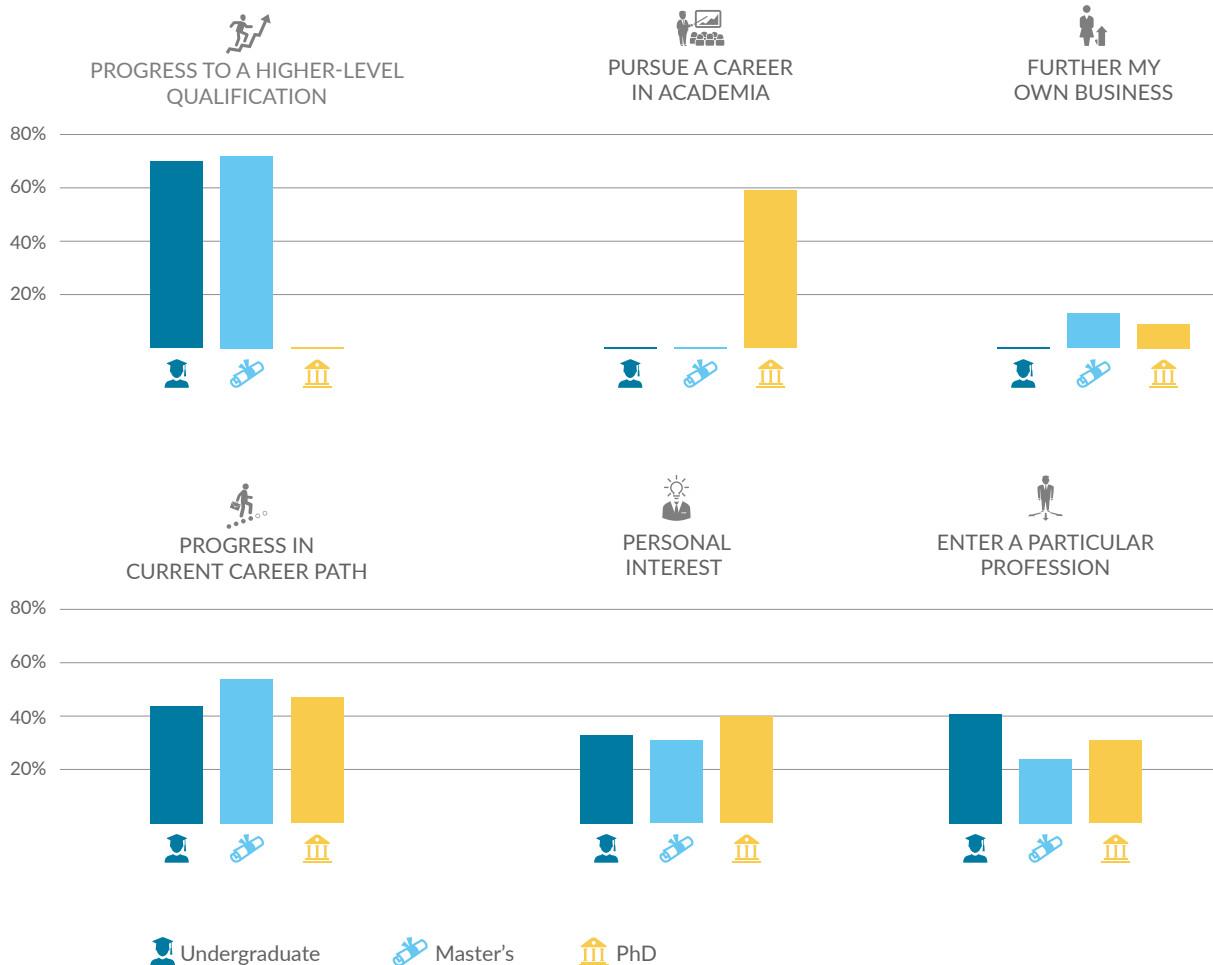
Overall, 70% of UG participants cite 'progress to a higher qualification' as their primary motivation for pursuing a degree, which could be indicative of the ever-expanding value of HE worldwide. This motivation ties UG and master's applicants

together throughout the survey, recurring as the central drive across different regions and subject preferences for both groups.

### Undergraduate versus postgraduate applicants' motivations

PhD applicants are once again primarily motivated by a desire to pursue a career in academia, whilst none of the UG applicants surveyed cite this as a motivation for studying. This would suggest that interest in academic careers is often developed while at university and through studying particular courses, rather than outside of HE.

### Leading applicant motivations to study



## UNDERGRADUATE MOTIVATIONS

Entrepreneurship is also a low priority for UG applicants, with none of the applicants stating they were undertaking a degree to further their own business. This could be related to a lack of experience and exposure to the labor market, as this motivation is chosen significantly more frequently by master's and PhD applicants.

Career progression is the second most popular motivation for all three applicant groups, indicating, unsurprisingly, that HE is inexplicably tied to career success in the perceptions of applicants worldwide. However, personal interest features low in both UG and master's applicant motivations, while it is in the top five list for PhD applicants.

41% of UG applicants are predominantly motivated to pursue a degree in order to enter a particular profession. For both master's and PhD applicants, this is a fairly low incentive, suggesting UGs are more likely to choose a degree tactically so that they can work in a chosen field.

### Study motivations by region

#### Africa and the Middle East

UG applicants from Africa and the Middle East

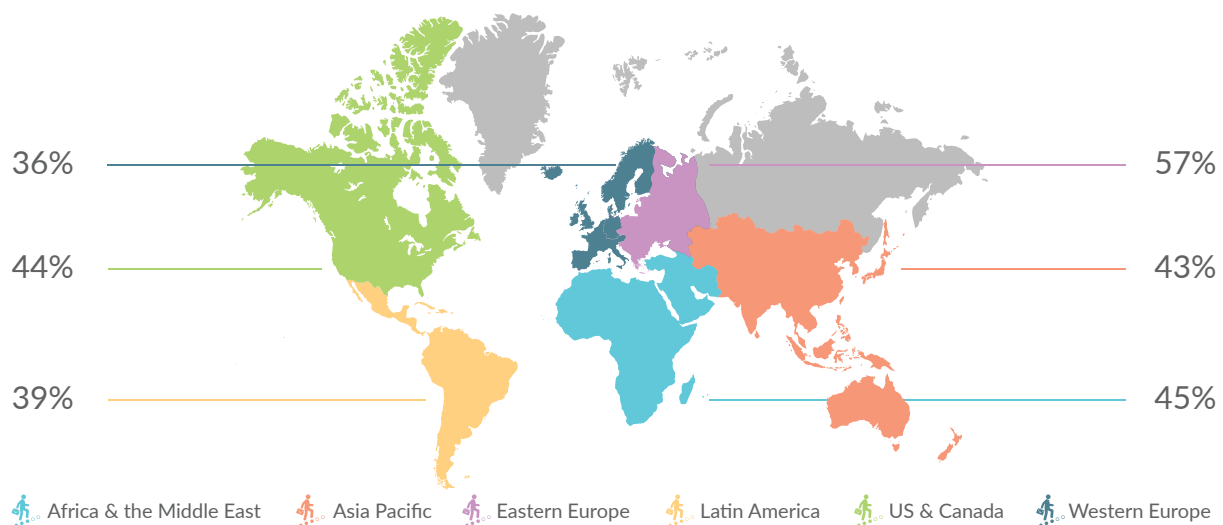
cite employability and career-related goals as key motivations for studying. 'Progress in my current career path' (45%), 'requirement to enter a particular profession' (44%) and 'employment prospects' (29%), are the most commonly chosen study motivations.

Applicants from these regions, as compared to all other regions surveyed, are the least likely to choose personal interest as a motivation for studying. Only 24% of UG Africa and the Middle East applicants regard this as a primary motivation for undertaking a degree. This is also a low incentive among PhD and master's applicants from the region, suggesting that post-study work opportunities and employment outcomes related to subject choices are likely to be highly important to students from Africa and the Middle East.

#### Eastern Europe

Like UG applicants from Africa and the Middle East, prospective UG students from Eastern Europe are also largely motivated by employability and career goals. Applicants from this region cite 'progress in my current career path' (57%), 'requirement to enter a particular profession' (43%) and 'employment prospects' (32%) in their top study motivations.

### Career progression as a motivation to study undergraduate programs



## UNDERGRADUATE MOTIVATIONS

The similarities between these regions could be linked to the somewhat comparable socio-economic backgrounds of these applicants. The pursuit of international UG study is plausibly linked to the search for greater employment opportunities in selected study destinations for applicants from lower and middle-income regions.

### Western Europe

Western European UG applicants are highly motivated by personal interest in comparison to other markets. 50% of UG applicants from this region cite this as the most significant incentive for undertaking a degree.

This could be related to a) overall economic well-being of applicants and b) easy access to government loans in certain Western European countries, alongside affordable or even free tuition in others, like Germany or Austria. These factors enable greater freedom for applicants to pursue HE out of interest, rather than necessity or return on investment.

### Latin America

Latin American UG applicants, similarly to Western European applicants, and more frequently than

other regions surveyed, express personal interest as a significant motivation for studying. Whilst Argentina and Brazil offer tuition for little or no cost, thus encouraging personal interest pursuits, the survey reveals something potentially more intrinsic to Latin American applicants.

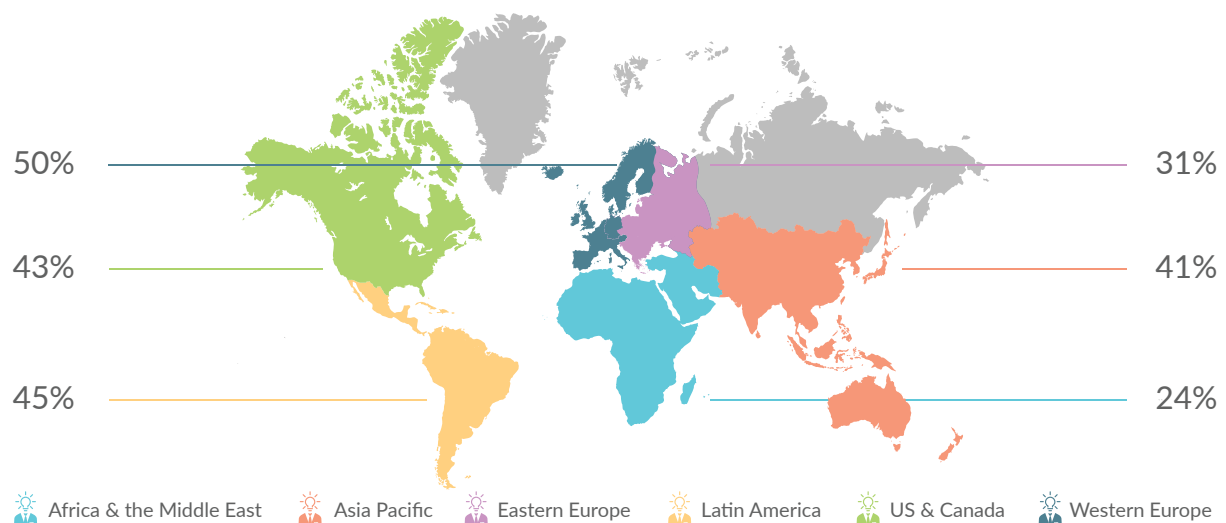
For instance, Latin America UG applicants cite opportunities for cultural exchange as a driving motivation more than any other region surveyed. This, alongside the high regard for personal interest, could suggest a more fundamental value for international HE in the region.

Moreover, students from low-income backgrounds are likely to struggle with access to higher education in Latin America, let alone abroad, thereby again making affluence, like in Western Europe, a potential causal factor for higher rates of applicants being motivated by personal interest.

### Asia Pacific & US and Canada

Survey participants in Asia Pacific, US and Canada, display striking similarities to one another in their primary motivations for UG study. Applicants from these regions are less likely to be motivated by employment prospects, and more inclined to

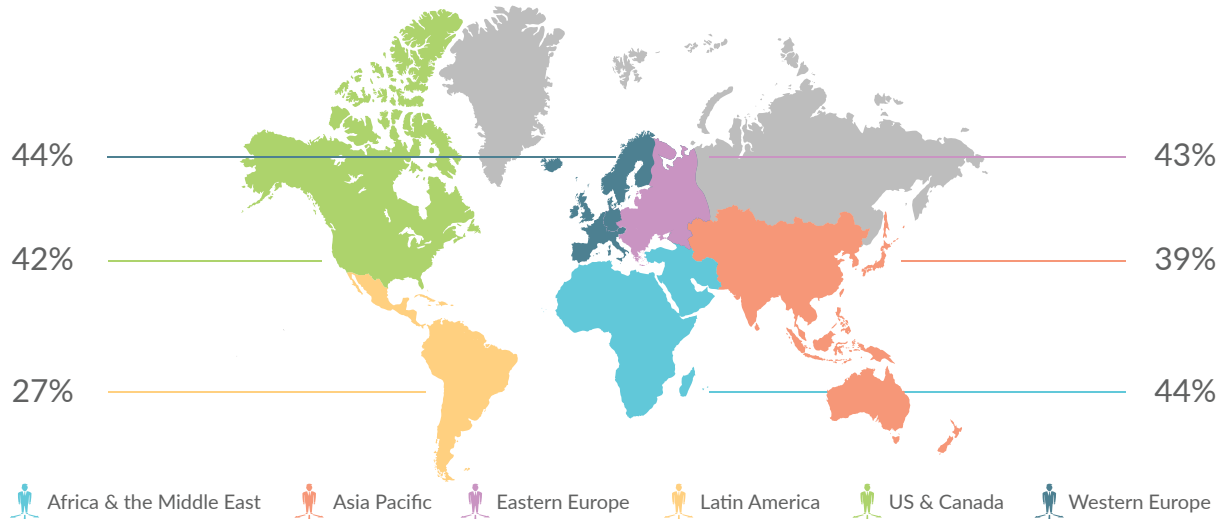
### Personal interest as a motivation to study undergraduate programs





## UNDERGRADUATE MOTIVATIONS

### Requirement to enter a profession as a motivation to study undergraduate programs



focus on career progression, personal interest and professional choices, which could indicate undergraduates in these regions already have some work experience.

American and Canadian applicants assert their employer required them to study at a greater rate than all other regions surveyed. This could be indicative of a more symbiotic relationship between employers and HE in these regions, if indeed applicants are more likely to receive financial aid and motivation in the workplace.

#### Subject level analysis

According to the QS Global Employer Survey 2017 results, the top five disciplines employers recruit from, in descending order, are: engineering, accountancy and finance, business and management studies, computer science and information systems, economics and econometrics. An analysis of UG applicant motivations choosing these disciplines can help to generate a picture of their expectations before they attend university and emerge as qualified professionals and in-demand graduates. Applicants to these subjects each express the same top three motivations: to






progress to a higher-level qualification; to progress in my current career path; as a requirement to enter a particular profession.

However, UG business/management applicants cite career progression at the highest rate (47%), whilst UG engineering applicants are most likely to be motivated to study in order to enter their profession of choice (42%). UG economics and econometrics applicants are most frequently incentivized by improved employment prospects (37%) and personal interest (33%).

Out of all subject choices surveyed, UG applicants applying for environmental studies are highly incentivized by career progression (51%) and are most likely to regard the reputation of a university as a key factor when choosing a study destination. The greatest drive by personal interest can be attributed to UG politics and international relations applicants (39%).

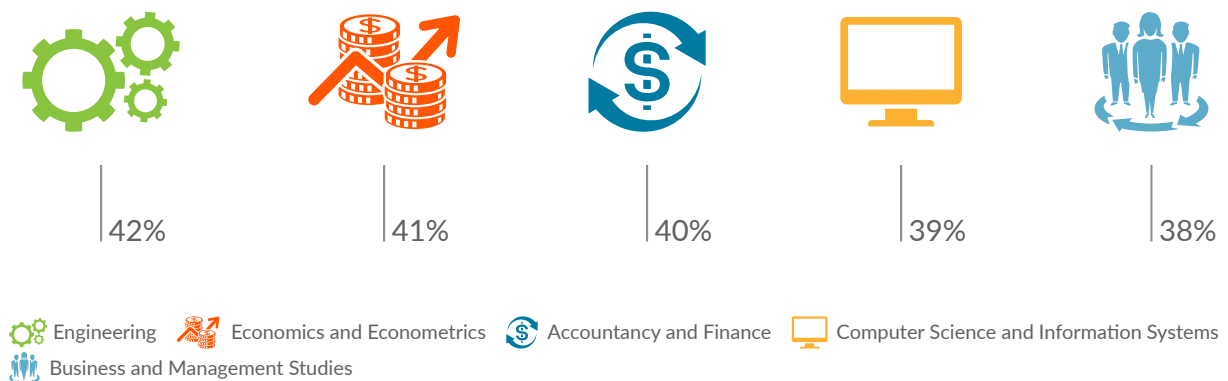
## UNDERGRADUATE MOTIVATIONS

### Top 5 disciplines employers recruit from

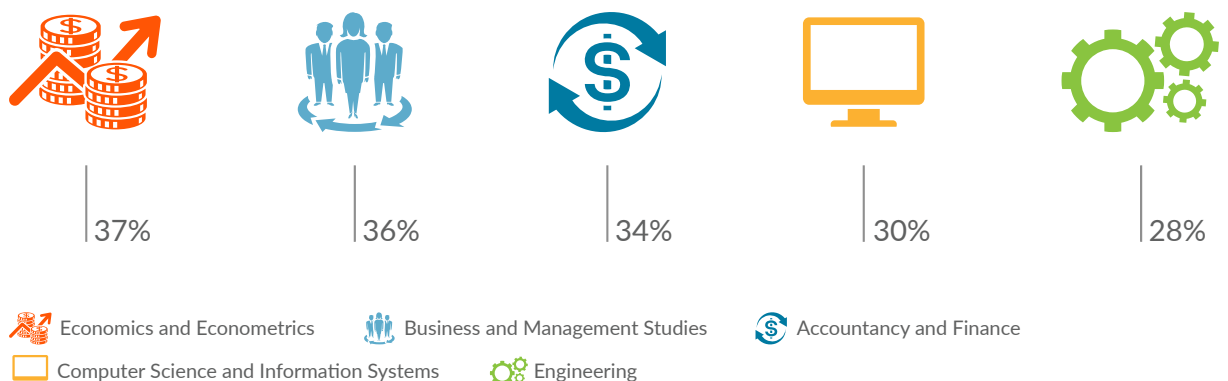
1		Engineering
2		Accountancy and Finance
3		Business and Management Studies
4		Computer Science and Information Systems
5		Economics and Econometrics

QS Global Employer Survey 2017

### Requirement to enter a profession as a motivation to study undergraduate programs



### Improving employment prospects as a motivation to study undergraduate programs



## PREFERRED STUDY DESTINATIONS

The most popular study destination choices by all applicants this year are: the US (48%), the UK (42%), Canada (34%), Australia (28%) and Germany (28%). Overall, the US and the UK ranked first and second respectively, showing that despite political uncertainties, the prestige of institutions in these countries still attracts significant numbers of international students to these markets.

Interestingly, this year's results reveal alternative English-speaking destinations are rising in the ranks of preferred study destinations. Canada remains the third most-popular study destination, and in many cases, outperforms the UK and the US when target destinations are broken down by country, especially in the Middle East region. Worldwide, Australia replaced Germany in fourth place and New Zealand jumped up two positions from twelfth to tenth. This could indicate that students who previously would have chosen the US or the UK are now actively considering Australia and Canada as suitable alternatives. The UK has also dropped in popularity in some regions, as demonstrated below.

The 2017 QS Brexit report, *'Is Brexit Turning International Students Away from the UK?'*, revealed that political developments affect students' decisions in relation to study destinations. The UK's decision to leave the EU led to feelings of uncertainty, particularly in relation to fees, visas and post-study work opportunities.

### Destination choices by region

#### Eastern Europe











This year the US has outperformed the UK as the number one destination for Eastern European applicants, with 38.9% citing it as their preferred choice. The UK comes second with 37.5%, followed by Germany with 33.4%, then Canada (24.8%) and the Netherlands (21.6%). Compared to last year's preferred countries for this region, France has dropped from fourth to eighth place, Canada has gone up one position and the Netherlands has shot up three, making it into the top five list for Eastern European applicants for the first time.

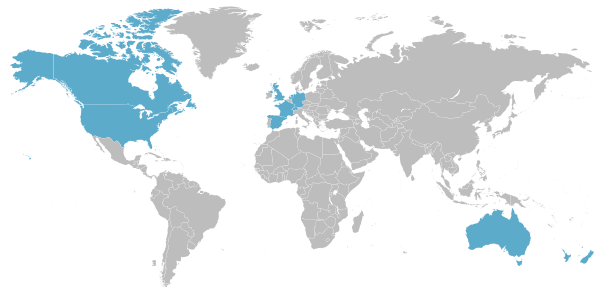
The Netherlands is not the only Western European country to experience increased interest from Eastern European applicants however. Sweden has risen from the eleventh to ninth most-popular choice, Norway from twelfth to tenth and Austria from fifteenth to eleventh. The boosted interest in these countries could be explained by free or low-cost education, as in Germany, the Netherlands, and Norway, and reflect a negative response to the UK leaving the EU.

#### Western Europe

For Western Europe, the top five country choices are the UK (59.1%), US (36.0%), France (21.9%), Germany (21.8%) and Canada (20.3%). Canada replaced the Netherlands as the fifth most preferred

### Top 10 study destinations for all students

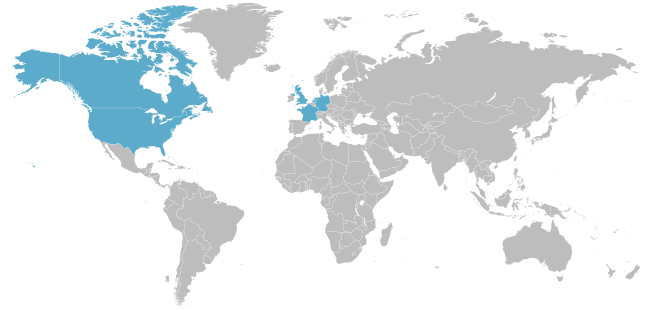
1		United States	42%	6		France	14%
2		United Kingdom	34%	7		Switzerland	11%
3		Canada	33%	8		Netherlands	10%
4		Australia	26%	9		Spain	9%
5		Germany	24%	10		New Zealand	9%



## PREFERRED STUDY DESTINATIONS

### Top 5 destinations for Eastern European applicants: year on year comparison

2016	2017
1  United Kingdom	1  United States
2  United States	2  United Kingdom
3  Germany	3  Germany
4  France	4  Canada
5  Canada	5  Netherlands



country for Western European applicants, replicating trends elsewhere in the world, and demonstrating Canada's rising popularity as a destination for international students.

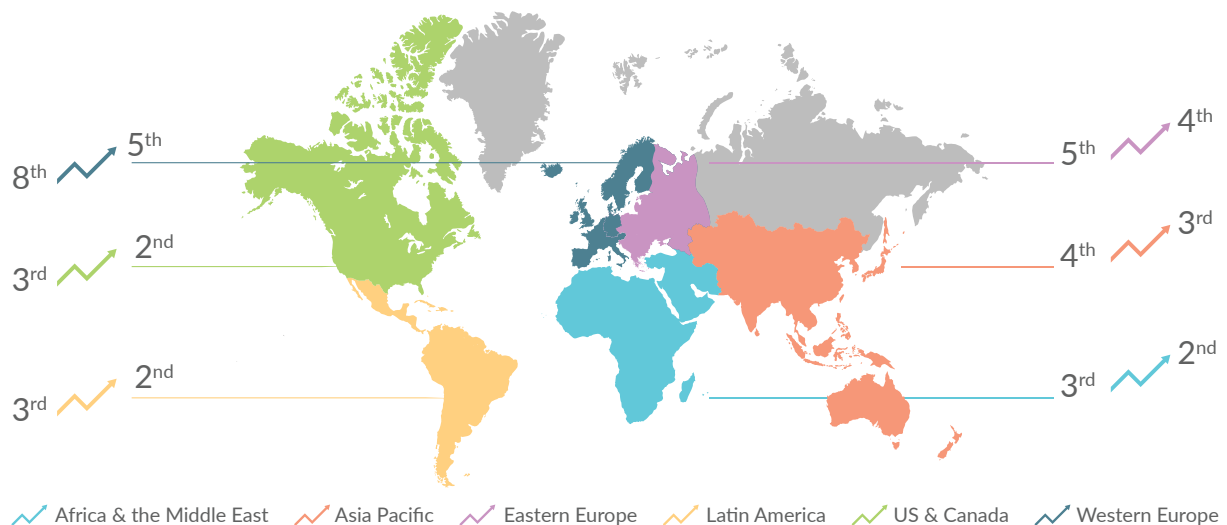
Once again, other than Singapore, countries in Africa and the Middle East, Latin America and Asia Pacific do not appear in the top 20 target destinations of Western European applicants. This is potentially due to students seeking destinations with cultural similarities, the quality of education, and the socio-economic background of students in Western Europe, allowing them to choose destinations with higher fees.

#### Latin America

Applicants from Latin America cite their top five target destinations as: the US (51.9%), Canada (43.3%), the UK (41.2%), Australia (31.9%) and Spain (29.4%). Once again, the UK has dropped from second to third place and Canada has risen in the ranks, alongside Australia, which has replaced Spain as the fourth most popular destination for applicants from this region, despite the language ties.

Brazil is the only Latin American country to appear in the top 20 most popular target destinations for Latin American applicants, highlighting the

### The rising popularity of Canada as a top 10 study destination: year on year comparison



## PREFERRED STUDY DESTINATIONS

emphasis students in this region place on cultural exchange and truly international education. The only country from Asia that appears in the top 20 is Japan, with 6% of applicants citing it as their country of preference.

### US & Canada

Survey participants in the US and Canada overwhelmingly choose the US as their target destination for HE studies, conceivably due to the proximity and high-quality education available within reach. The QS World University Rankings® 2018 features five US universities in the top 10 alone. The most popular destination choices for students from this region are: the US (73.9%), Canada (24.9%), the UK (21.4%), France (11.4%) and Spain (8.2%). Spain appears in the top five for the first time, replacing Germany. This could be explained by the large Spanish-speaking population in the US.

Other than applicants from Asia Pacific itself, applicants from the US and Canada show the greatest inclination to consider study destinations in Asia. Looking at the top 20 preferred countries, most regions selected only one or two countries in Asia, while American and Canadian applicants chose four: Hong Kong, China, Singapore and Japan. Singapore and Japan appear most frequently

in the top 20 across all regions.

The heightened interest could be related to university partnerships, such as the Yale-NUS college for example. Furthermore, given applicants from this region are largely motivated by career progression, they are potentially also mindful of the socio-economic advancement of countries in Asia. This could suggest they are looking to develop cultural ties to enhance their career opportunities.

### Asia Pacific

The top five destinations for students from Asia Pacific include: the US (40.6%), Australia (32.3%), Canada (31.9%), the UK (31.3%) and Germany (26.4%). The UK has slipped from second to fourth place - the biggest drop out of all regions surveyed. The new restrictions put forward by the UK government on post-study work visas and fears related to Brexit could be contributing to this shift in priorities. QS research conducted in 2017 with Indian applicants indicated that many are concerned about the impacts of the UK foreign policy, particularly in relation to post-study work visas.

Singapore (15.9%), Japan (7.4%), China (6.1%) and Malaysia (5.6%) are selected more commonly by prospective students from Asia Pacific compared

### Asian countries that appear in the top 20 study destinations for all applicants

#### ✈️ AFRICA & THE MIDDLE EAST

- 1 China
- 2 Japan

#### ✈️ ASIA PACIFIC

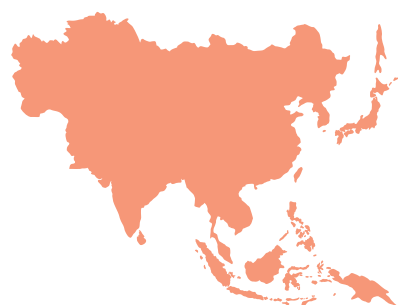
- 1 Singapore
- 2 India
- 3 Japan
- 4 China
- 5 Malaysia

#### ✈️ EASTERN EUROPE

- 1 Singapore
- 2 Japan

#### ✈️ LATIN AMERICA

- 1 Japan



#### ✈️ US & CANADA

- 1 Hong Kong
- 2 China
- 3 Singapore
- 4 Japan

#### ✈️ WESTERN EUROPE

- 1 Singapore

## PREFERRED STUDY DESTINATIONS

to other regions surveyed. This is conceivably due to the proximity and lower study costs, but this popularity is predicted to peak in the coming decades, as governments in these regions invest in HE in order to encourage more regional study exchange.

### Africa and the Middle East

The US remains the number one study destination for applicants from Africa and the Middle East, with 37.8% selecting it as their preferred destination. However, Canada has replaced the UK as the second most popular target destination, following the US closely at 37.6%. This is a narrow margin, considering Canada placed third last year for applicants from this region, indicating Canada's rising popularity as an alternative English-speaking destination. Australia and Germany once again rank fourth and fifth respectively, and France has

grown in popularity, rising from ninth to sixth.

Interestingly, for the first time, China appears within the top 10 list of study destinations for students in this region, emerging as the eighth most popular destination. This is significant, given that last year China did not even make it into the top 20 preferred countries for applicants from Africa and Middle East. Moreover, participants from this region cite China as a preferred study destination more than any other region surveyed (9.1%).

### *Will the US remain the most popular study destination?*

#### Impacts of the travel ban

The data also sheds some light on the impact of the recent foreign policy developments in the US. The US Supreme Court approved a travel ban in

## Case study

### Declining popularity of the US in Africa & the Middle East

Looking at the target destinations of countries in Africa and the Middle East can provide further context to the survey findings. In general, African countries favor the US and Canada as their number one destination choice, but there are anomalies in the data. Applicants in Mozambique, for example, favor Brazil (44.4%), Germany (27.8%), the UK (27.8%), Australia (22.2%) and Canada (22.2%) and the US does not even appear in the top ten, ranking 20th. The strong diplomatic relations and common dialect Mozambique shares with Brazil could explain this trend, and the higher rates of poverty make



tuition-free universities in Germany appealing. In the Middle East, trends tend to be much more varied, with the US performing relatively poorly in many cases compared to other countries surveyed, with Canada, the UK and Australia competing for first place. For instance, in Iraq the US ranks fourth most popular and in Oman it is sixth.

## PREFERRED STUDY DESTINATIONS

December 2017 that will impact a number of Muslim-majority nations, as well as North Korea. Looking at the top five destinations selected by applicants in the countries affected by the travel ban, it appears that for those in Yemen, the US has peaked in popularity.

However, survey participants in Iran, Libya, Iraq, Somalia and Sudan are no longer selecting the US as their number one study destination. This would suggest that, overall, the travel ban has had a negative impact on applicants' intent to study in the US, with many looking to Canada, Germany and the UK as alternatives.

Whilst Iraq and Sudan are no longer included in the travel ban, they were when this research was conducted, which therefore may have impacted their destination choice. The results are demonstrated in the charts below.

It is important to note that the US is still the most popular study destination overall, and as long as its universities continue to top the league tables, it is likely that it will remain so. As demonstrated in the 2018 QS white paper, 'Student Mobility and Demographic Changes', the future of international education will be shaped by technology, which

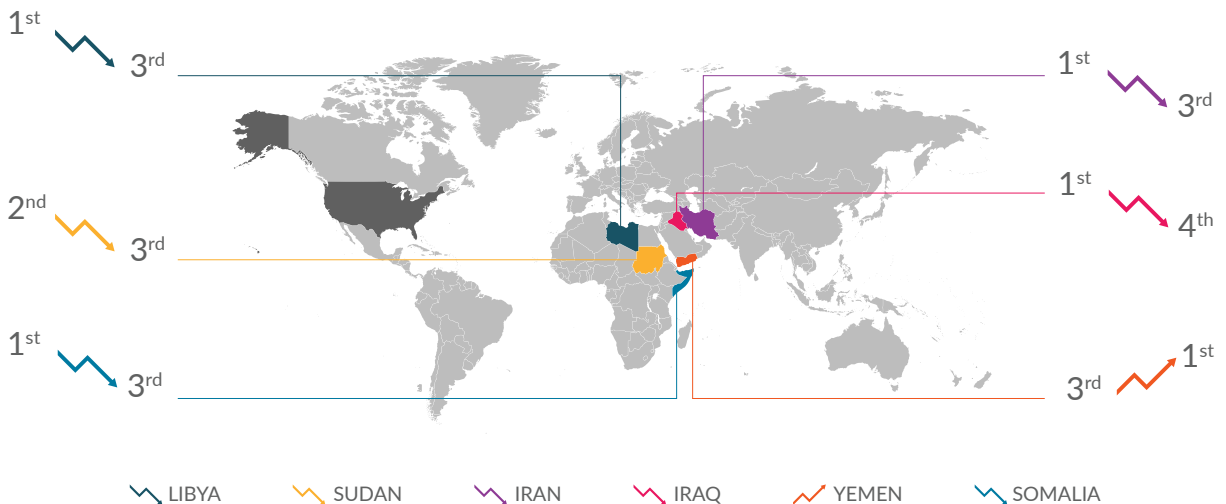
will enable a broader global participation. Meanwhile, as the Executive Vice President of Global Engagement and Research at StudyPortals, Dr. Rahul Choudaha, indicated in the white paper: "HE in the Middle East and Asia Pacific will begin attracting more international students. Future insight produced by QS will be able to trace any shifts in student mobility that may occur due to these developments".

### Drivers of destination choice

Alongside gathering a picture of study destinations for students worldwide, the QS Applicant Survey also identifies the drive behind these country choices. This year, much like in previous years, 'scholarship/financial aid availability' remains an important priority for applicants when selecting where to study, with 42% citing it as their number one criteria when considering destinations.

Given the two most popular host destinations have received negative publicity relating to education funding cuts, the heightened concern about scholarships and financial aid comes at a conceivably troublesome time for survey respondents. In the US, applicants face high fees alongside fears about budget cuts to HE under

### The impact of the travel ban on students' perceptions of the US: year on year comparison



## PREFERRED STUDY DESTINATIONS

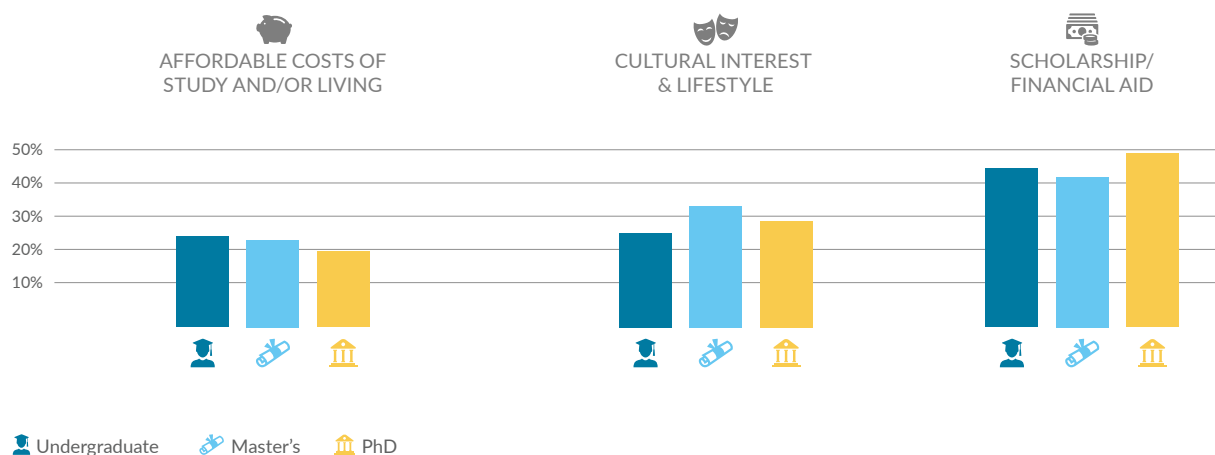
Trump’s administration. Similarly, in the UK, fees are also high and Brexit’s perceived impact on the HE sector is largely related to a loss of EU funding. Warnings about rising global interest rates and growing populations, alongside fears of another debt crisis, provide further context to this being a leading priority amongst applicants today.

The second most commonly cited motivation for selecting a country is ‘international recognition of qualifications’, which highlights survey participants’ desire to safeguard the value and investment they put into their degree. Jumping up one spot from last year, the third is ‘would like to work there afterwards’, indicating applicants are increasingly seeking employment opportunities in other countries and hoping to gain a longer-term international experience. This is followed by ‘cultural interest and lifestyle’, whilst ‘institutions I’m interested in are located there’, is cited as the fifth most-common country choice reason overall.

### By level of study

Undergraduates are most likely to consider affordability of both study and living costs in their destination choices, with 24% citing this as a significant factor in their destination choice. Cultural interest and lifestyle is highest for master’s applicants at 32%, while PhD applicants are most likely to choose a destination based on the availability of scholarships and financial aid in that location, with 49% of applicants expressing this view.

### Leading motivations driving destination choice





## DESIRE TO PROGRESS TO HIGHER QUALIFICATIONS

All survey respondents were asked to name their motivations for deciding to study their selected programs. At master's level, the most popular reason for studying is 'to progress to a higher level of qualification', hence it is explored in more detail in this section. This marks a change from the previous year's QS Applicant Survey results, when the most commonly cited answer was 'to progress in my current career path'.

This shift suggests an interesting change in priorities for students worldwide, and hints that an increasing number of young people feel that just an undergraduate degree will not be sufficient. Instead, they are choosing a master's degree to further specialize, and then often follow that with a PhD in the future.

### East versus West

The desire to progress to a higher-level qualification is consistent across the different regions surveyed. It remains the most popular reason for studying a master's degree in each region of the world, except for Western Europe and the US and Canada, where it experienced a slight dip. This may suggest that students from these more prosperous and developed regions have a greater sense of security when it comes to entering the workplace, or an easier pathway into graduate work than young people in other countries.

At the other end of the spectrum, Eastern Europe is the region with the highest proportion of students interested in progressing to a higher-level qualification. 79% of respondents from this region cite it as a motivation for choosing to study

### Progression to a higher level qualification as a motivation to study

AFRICA & THE MIDDLE EAST



ASIA PACIFIC



EASTERN EUROPE



LATIN AMERICA



US & CANADA



WESTERN EUROPE



Undergraduate Master's

## DESIRE TO PROGRESS TO HIGHER QUALIFICATIONS

a master's degree. Given the smaller concentration of world leading universities in this part of the world (only one institution from Eastern Europe features in the top 200 of the QS World University Rankings® 2018) and the historical focus on higher education inherited from the Soviet Era, it is arguably unsurprising that many students feel the need to gain graduate qualifications.

### Differences between subjects

On a subject level, it is possible to see slight variances in applicants' motivations, which loosely correlate to the career demands of different sectors. For instance, a master's degree is more likely to be seen as a necessary qualification by engineering students. This is to be expected given the highly technical nature of this field and the demonstrable career benefits of specializing at postgraduate level.

Social policy and administration students are also more likely to choose a master's degree because of a desire to gain a higher degree qualification, with 77% of those surveyed indicating it is a factor in their decision making. Unlike with engineering, there is perhaps a less clear-cut explanation for this, as social policy is not traditionally seen as a subject

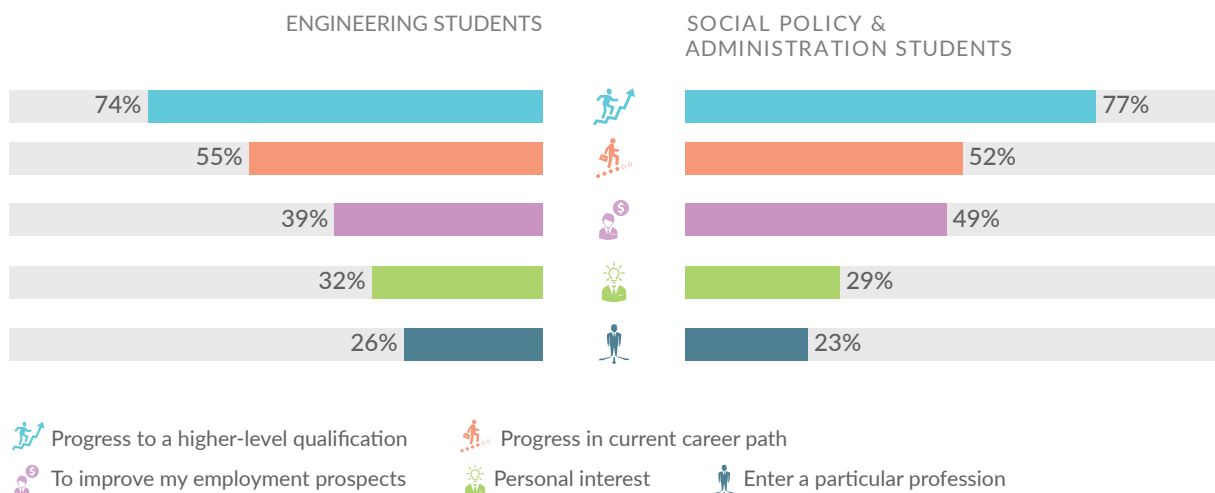
that leads to an obvious career path. However, social science degrees are typically quite broad at undergraduate level, and so the choice to study a master's degree may be linked to students' desire to further specialize and build their expertise.

### Exchange opportunities as a lead motivation for some students

18% of all master's applicants feel the opportunity to participate in an exchange program plays a role in their decision-making. The same proportion of PhD applicants cite this motivation, while only 16% of undergraduate applicants indicate it as a consideration. In all cases, exchange opportunities closely follow the top five motivations selected by these students.

The relative lack of attention paid to exchange opportunities is unsurprising, as for many students, an opportunity to participate in a study abroad scheme is a bonus rather than a required element of their chosen degree. However, there are interesting variances in the importance of exchange programs on a regional and subject level, showing a divergence in priorities in different parts of the world.

### Key motivation to study master's programs



## DESIRE TO PROGRESS TO HIGHER QUALIFICATIONS

For instance, Latin American students at all levels of study place greater importance on exchange opportunities than the global average. At undergraduate level, 36% of respondents from Latin America cite opportunities for exchange as a reason for study, making it the fourth most popular motivation for studying. At master's level, 32% of students are driven by this incentive and it ranks fifth. It also ranks fifth at PhD level, with 30% of respondents motivated by opportunities for exchange.

### *Examining Latin America's relationship with exchange opportunities*

Why are exchange opportunities so much more important for Latin American students than students elsewhere in the world? Although the region has grown economically over the last few decades, producing a growing middle-class population, Latin American universities continue to lag behind the more illustrious institutions of Western Europe, the US and Canada.

Latin American institutions also lack the international diversity of universities elsewhere in the world, with only four of the 89 universities included in the QS World University Rankings® 2018 receiving a score for the proportion of international students studying there. (More information about the rankings methodology can be found on [www.TopUniversities.com](http://www.TopUniversities.com)).

This suggests two potential factors behind this motivation among Latin American students: a lack of world-class universities in the region and a lack of international diversity within these institutions. A lack of prestigious institutions in the region is likely to encourage students to seek a more reputable study opportunity elsewhere. According to a 2017 British Council report, the most popular study destinations for Latin American students are the US, Spain, France, Germany, Italy and the UK. Over 40 universities from these six countries are ranked higher than the best institution in the whole of Latin America, so there are clear academic gains

students achieve by securing an exchange program.

### **Common dialects opening doors to HE sectors**

The lack of a language barrier in some cases is likely to make an international study exchange more appealing. Although English is not spoken widely in Latin American countries, Spanish is the second most-spoken language in South America after Portuguese; Italian is spoken in several countries including Argentina, Brazil, Chile and Peru; and German is spoken by communities in Brazil, Argentina, Colombia, Paraguay and several other countries. This familiarity, perhaps coupled with a desire to improve one's language skills, is worth considering.

### **Greater value for cultural exchange**

As mentioned above, the second driving factor behind the interest in opportunities for exchange could also come from the fact that Latin American institutions see few incoming international students, when compared to universities located elsewhere. The lack of opportunities for Latin American students to meet people from other countries and cultures may be creating a "bubble" effect, increasing the desire of young people with a global outlook to study abroad and broaden their experiences.

Whatever the reason, it is clear Latin American students are particularly excited by the opportunities available for exchange. It should be noted, however, that the proportion of interested students does fall as we progress from undergraduate to postgraduate and then to PhD. Given this coincides with an uptick in students saying that improving their employment prospects is important, there seems to be a slight shift in priorities as students get older and closer to leaving the university system. However, the fact that interest in exchange opportunities does not fade away entirely shows how durable and important a global education experience is for students in this part of the world.

## FUNDING AS A LEADING MOTIVATION

An overwhelming majority of students at all study levels (70% of PhD, 60% of master's and 57% of undergraduate applicants) cite funding available to study a program as the leading factor in choosing an institution. In all instances, this is followed by the institution's reputation in a student's chosen subject area. This shows a set of competing priorities, where the prestige of a university is still important, but can easily be offset by a high cost of study. The concern for funding is consistent across the regions, with the exception of Western Europe.

### Gender differences

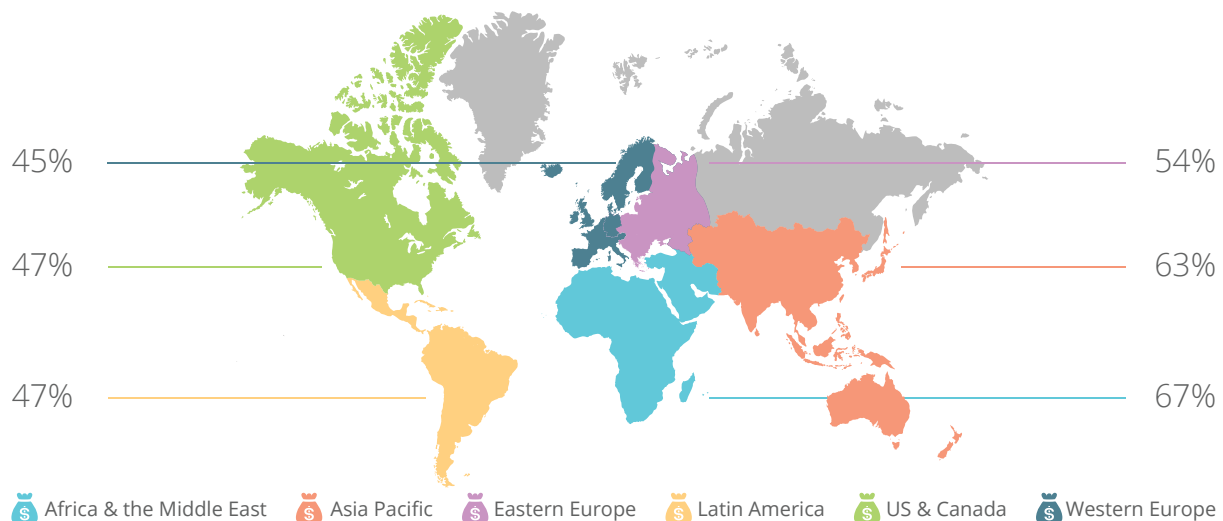
Looking at the data through a gender lens highlights the same findings in terms of funding. 58% of all female applicants and 57% of male applicants ranked funding as the most important factor when choosing an institution. The differences stand out when looking at other motivations for selecting a university. For example, 36% of undergraduate female applicants argued that a university offering specific parts of a program they were interested in is important, with only 33% of male applicants agreeing with this statement. At postgraduate level, female master's applicants also put more emphasis on the content of the degree course

(36%) than male applicants (31%). Among PhD applicants, 38% of female respondents were selecting an institution based on programs they were interested in, as compared to only 30% of male applicants. Therefore, there is a consistent trend of female applicants across all levels putting more emphasis on program content than male applicants.

### Regional differences

Lower-income regions such as Africa and the Middle East have the highest proportion of undergraduate students (61%) motivated by funding when choosing an institution. They are followed by the Asia Pacific region, with 58% of undergraduate applicants listing funding as an important factor. In contrast, only 47% of undergraduate applicants from the US and Canada believed funding to be the main factor. Western Europe is the anomaly as it is the only region where funding is listed second to the institution's reputation in a chosen subject area, with 53% of undergraduate applicants listing funding as the deciding factor. These trends reflect the economic conditions of the different regions. This is likely to be because in affluent regions such as Europe and North America, students have

### Funding as a key motivation to study master's programs



## FUNDING AS A LEADING MOTIVATION

access to government loans for tuition, whereas many developing markets (such as those found in Africa and the Middle East) do not have a system of government-sponsored tuition loans. As such, students and their families are expected to pay the entirety of fees on their own. Consequently, and intuitively, a greater focus on funding is seen among students from lower-income backgrounds and regions.

The trend is particularly clear among postgraduate (PhD and master's) applicants. 70% of PhD applicants listed funding available as the most important factor when choosing an institution, as compared to 60% of master's applicants and 57% of undergraduates. These differences between undergraduates and postgraduates are due to a variety of factors. Firstly, in many countries PhD and master's applicants have less access to student loans than undergraduates, and secondly, many master's courses are extremely expensive, especially in the UK and the US.

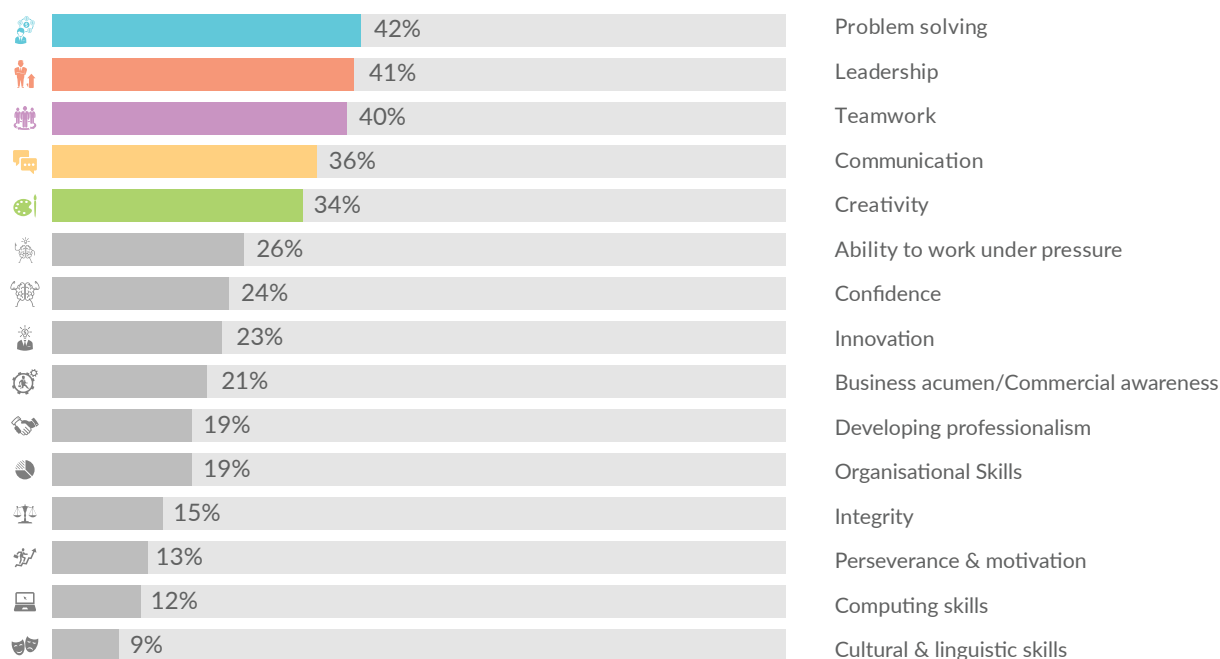
At 47% and 45%, the second most-listed motivation among PhD and master's applicants respectively was the institution's reputation in a specific subject area. Interestingly, unlike for undergraduates, the

course structure was the fourth most important motivational factor for master's students (30%). This would suggest that master's applicants are more concerned with the content of their course than undergraduates. This is consistent with the fact that PhD and master's students tend to be older and more experienced, and hence tend to be more concerned with the quality of their academic experience and the resulting employment prospects.

Master's applicants' motivations reflect undergraduate motivations when it comes to funding, with master's applicants from Africa and the Middle East (67%) and Asia Pacific (63%) putting the most emphasis on funding when compared to other regions. In contrast, only 47% of master's applicants from the US and Canada listed funding as a crucial priority. Similarly, only 45% of master's applicants from Western Europe chose funding as the deciding factor, compared to 48% who felt the institution's reputation in their chosen subject area was more important.

## DEVELOPING COLLABORATIVE SKILLS FOR EMPLOYMENT

### Most desired graduate skills by all students



Applicants were asked which skills they felt employers valued most in new recruits. When answering this, respondents were asked to consider the skills they would like to develop at university. Thinking about future employment, all applicants ranked problem solving (42%) as the skill employers are most likely to value. This was followed by 41% of applicants choosing leadership and 40% of applicants selecting teamwork. In fourth place was communication, chosen by 36% of applicants. Finally, perhaps less predictably, the fifth most important skill according to students is creativity, with 34% of applicants believing this to be crucial for future employment.

Differences emerged when the same results were analyzed by the level of study of respondents. For example, although problem solving was seen to be the leading skill by applicants of all levels, it was most valued by undergraduates and master's students, at 43%. Although the top five skills remained the same across the board, an exception

to the rule came from master's respondents who ranked teamwork (ranked second) higher than leadership (ranked third). Nevertheless, the general structure remained constant throughout, with communication and creativity being ranked fourth and fifth respectively.

The emphasis placed on problem solving as a skill can be partly explained by looking at the subjects which are most popular subject with all respondents. Business management was the most desired subject by all respondents, followed by engineering. These are both subject areas which require high problem-solving abilities. The leading target industry for the respondents this year is also engineering, which is in keeping with problem solving being the prioritized skill. Moreover, in an age where technology companies are increasingly hiring students for their problem solving and coding skills, it is unsurprising this is such a revered skill among respondents.

## DEVELOPING COLLABORATIVE SKILLS FOR EMPLOYMENT

It is interesting to note how highly teamwork and creativity were ranked, considering skills like business acumen, numeracy and confidence did not make the top five. This demonstrates that all applicants, whether undergraduate, master’s or PhD, believe that collaborative skills such as teamwork and creativity are more important in the current job market. One could argue that creativity has become increasingly important in the contemporary labor market since employees are expected to be more flexible and versatile in ways that add value to their employers.

### Gender and regional differences

Gender segmentation of the results revealed similar trends, with both male and female applicants ranking the skills in the exact same order, with problem solving ranked first, followed by leadership, teamwork, communication and creativity. However, new trends emerge when grouping applicant responses by region. For the Asia Pacific region, leadership was the highest-ranked skill. This was in stark contrast to every other

region, where problem solving was consistently the highest-ranked skill.

Another divergence from global averages came from Latin American respondents, who ranked teamwork as the second most important skill, and above leadership. The emphasis on teamwork can perhaps be traced back to the community programs which existed historically in Latin American socialist countries. In affluent regions such as the US, Canada and Western Europe, the top three skills were made up of the usual mix highlighted above. Interestingly, respondents from Africa, the Middle East, and Eastern Europe followed the same trajectory as these affluent regions. This can be explained by the fact that affluent regions tend to be key study destinations among applicants from less affluent regions such as Africa and the Middle East (the traditional East to West migration pattern). Hence, these applicants are interested in the skills they believe are important to employers in the regions they are most likely to work in.

### Top 5 desired skills among all students



## DEMOGRAPHICS

### Response rates and desired study levels

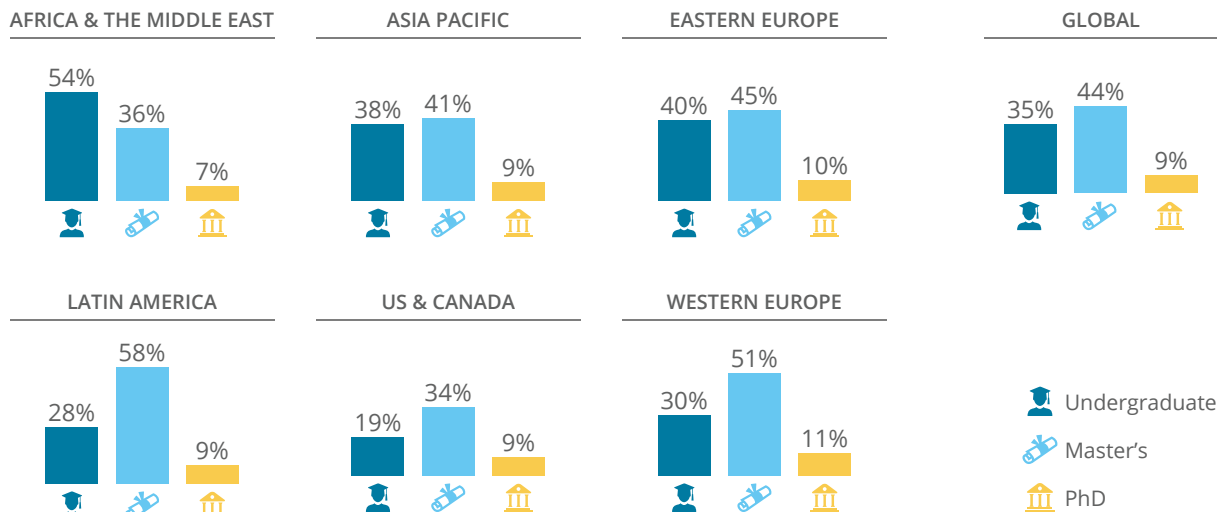
Between June 2016 and July 2017, the QS Applicant Survey received a total of 16,560 responses from prospective students worldwide. An equal proportion of respondents are interested in studying either an undergraduate or a master's program (41% each). As per usual, the number of applicants considering a PhD is noticeably lower, at 8% of all respondents.

Applicants from Latin America and Western Europe are predominantly interested in studying a master's program (58% and 51% respectively). Africa and the Middle East has the highest proportion of applicants interested in undergraduate study (54%), while Western Europe has the highest proportion of applicants interested in a PhD, at 11%.

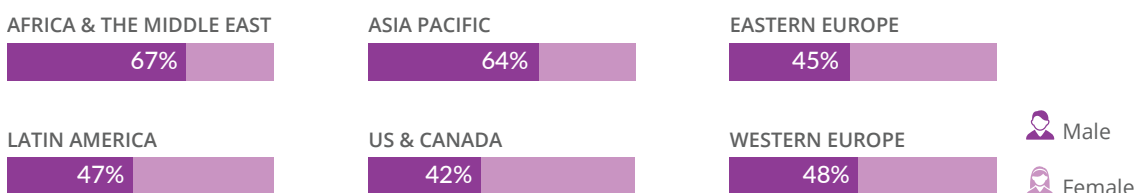
### Gender

Among survey respondents overall, 61% are male and 39% female. Analyzing this regionally, the highest proportion of male respondents is found in Africa and the Middle East, with male applicants making up 67% of respondents, as compared to 33% female respondents. Asia Pacific was the second most imbalanced region, with male applicants making up 64% of respondents. In contrast, the US has the highest proportion of female respondents at 57%.

### Desired study level



### Gender





## DEMOGRAPHICS

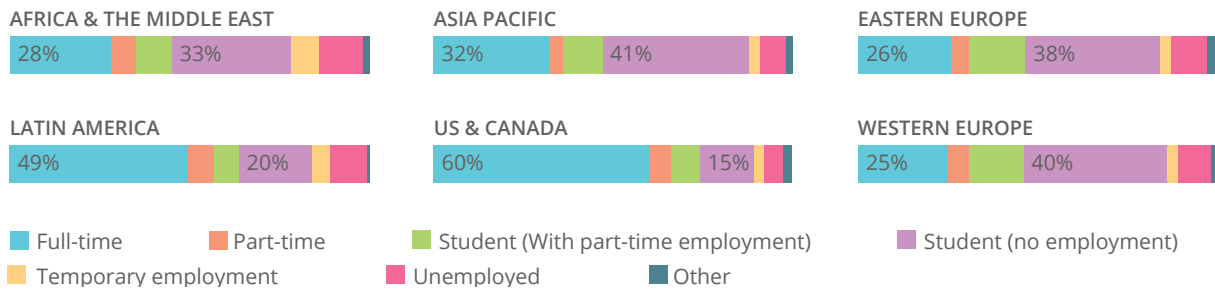
### Current employment status

Overall, 39% of respondents report being in full-time or part-time work (and not studying) at the time of participation, while 45% of respondents are current students (with or without part-time employment). Temporary employment is relatively low, with only 5% of respondents choosing this option. Regionally, the US and Canada has the highest proportion of respondents in full-time work, at 60%. In contrast, Western Europe has the highest proportion of students (with or without part-time employment), with 55% of respondents identifying as students. Africa and the Middle East has the highest level of unemployed respondents, at 12%.

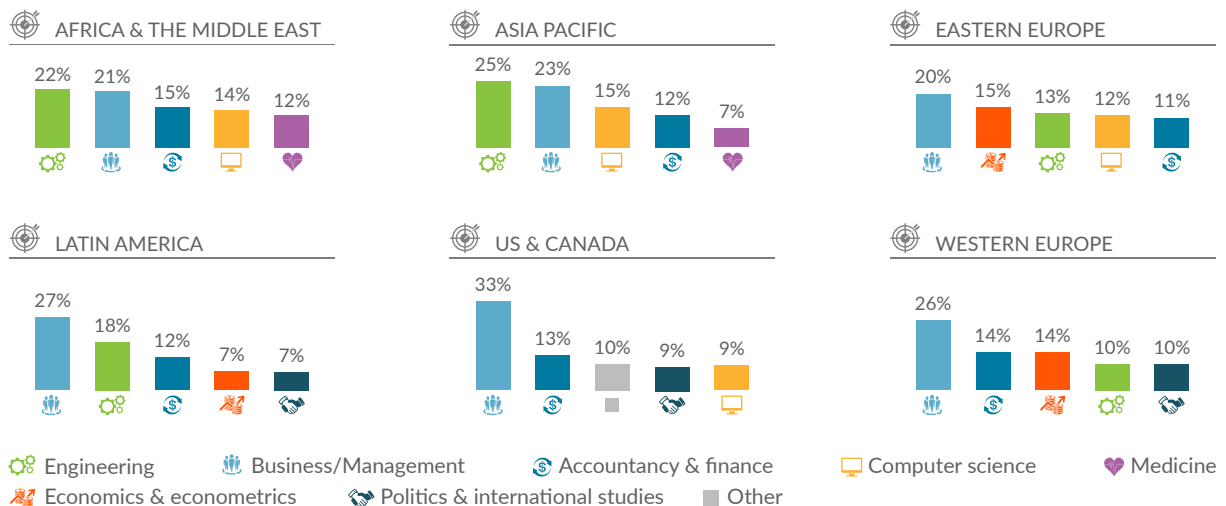
### Fields of study

Respondents were asked which subjects they intended to study, with the option of choosing multiple fields of interest. Overall, business and management is the most popular field in all of the profiled countries. The remainder of the top five ranked subjects consists of engineering, accounting and finance, computer science and medicine. In regional terms, business and management is the most popular subject in Eastern Europe, Latin America, the US and Canada, and Western Europe. However, for Africa and the Middle East as well as Asia Pacific, engineering is ranked the most popular subject.

### Current employment status



### Field of study: top 5 subjects



## FINAL THOUGHTS

The 2018 QS Applicant Survey reveals not only the continued investment in gaining further HE qualifications, but the consistent focus on obtaining international experience and a global outlook amongst prospective students. Universities can use the findings detailed in this report to develop strategic recruitment and branding strategies for an increasingly global audience of applicants.

So, how does an institution tailor their marketing messages to encompass a diverse and growing pool of knowledge seekers? The answer is to adopt a multi-faceted approach, considering the differences in priorities across markets, study levels and subject choices.

Recruiters should consider the underlying motivations behind applicant choices. The results from those seeking undergraduate and master's study suggest that there is an inflation of HE degrees with more students feeling the need for postgraduate qualifications, so universities should be explicit in the advantage they offer. PhD applicants are more likely to be attracted by the quality of the academic experience and research within their area of specialization. For all three groups, demonstrating the role HE plays in career progression is crucial.

Undergraduates in Western Europe and Latin America are highly incentivized by personal interest, highlighting the importance of quality and variety in programs on offer, whilst UGs in Africa and the Middle East, and Eastern Europe are motivated by employability. UG applicants in Asia Pacific and Canada are likely to consider a mix of career progression, personal interest and professional choices when making their study decisions, again demonstrating the importance of outstanding university careers services.

Exchange opportunities are a leading motivation for applicants in Latin America, especially when compared to the other regions surveyed. Universities looking to attract students from this region should highlight the international diversity

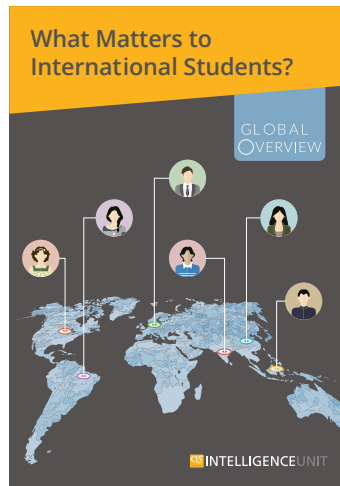
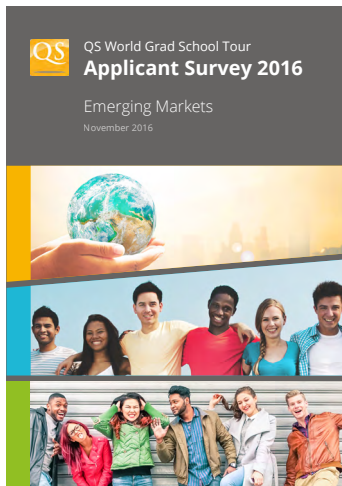
of their institutions, the opportunities for cultural exchange and the quality of education provided on a global level.

Universities should be transparent about funding and scholarships, and support students financially where possible, as applicants across the board regard this as a priority when choosing an institution. This is particularly important in countries with high tuition fees and increasingly limited government funding. Destinations offering free or low-cost education should use this as an opportunity to position themselves as key hosts.

As long as the US and the UK continue to top the league tables, they will continue to be the leading study destinations. However, Australia and Germany, and particularly Canada, have risen in the ranks of top five country choices, with Canada often outranking the UK in student preferences worldwide as compared to last year's results. In addition, respondents in countries in the Middle East are selecting the US as their number one destination choice less frequently, particularly amongst those affected by the travel ban.

How should study destinations respond to political change which impacts their respective HE systems? One strategy should be to adopt transparent and clear communication, using insight provided in this report, to ensure the quality of education available remains competitively high. Moreover, emerging markets should keep an eye on any shifts in applicant priorities, so they can present themselves as attractive alternative destinations when the opportunity arises.

See the full range of insight reports on student motivations and trends on <http://www.qs.com/qs-industry-reports/>



If you are interested in first-hand access to insights, want to explore a particular topic or region, or would like to partner with us on future research projects, please do not hesitate to get in touch, on [dasha@qs.com](mailto:dasha@qs.com).

## ABOUT QS

Established in 1990, QS is dedicated to providing independent and authoritative research and resources for both prospective students and higher education providers worldwide. The QS World University Rankings®, published annually since 2004 and hosted on student-focused platform TopUniversities.com, is among the most-consulted resources in the sector.

In response to growing public demand for comparative data on universities and other higher education providers, and for institutions to develop deeper insight into their competitive environment, the QS Intelligence Unit was formed in 2008. Committed to the key values of rigorous integrity, undeniable value, unique insight and charismatic presentation, QSIU strives to be the most trusted independent source of global intelligence on the higher education sector.

In addition to the research and insights provided by QSIU, the company offers a range of services to help prospective international students find the right institution – and vice versa. This includes a global series of higher education fairs; an annual publication cycle of guides, reports and e-papers; and a dynamic range of online platforms.



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