2022 Offers Made

Market Trends Across Australia, New Zealand and the UK

QS Client Group Data Insights
December 2021
For this report, we aggregated and analysed offer data of QS Client institutions across Australia, New Zealand and the UK. For ANZ institutions, we looked at 2022 intakes and for UK institutions we looked at 2021/2022 intakes. This data is current as of 17/12/2021.

**Top 10 Offshore Markets** for offers made (% as proportion of all offers made for respective academic cycles):

<table>
<thead>
<tr>
<th>Rank #</th>
<th>Australian &amp; New Zealand (QSES Partner Institutions)</th>
<th>United Kingdom (QSES Partner Institutions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>China (42%)</td>
<td>India (26%)</td>
</tr>
<tr>
<td>2nd</td>
<td>India (19%)</td>
<td>China (17%)</td>
</tr>
<tr>
<td>3rd</td>
<td>Hong Kong (3%)</td>
<td>Nigeria (13%)</td>
</tr>
<tr>
<td>4th</td>
<td>Vietnam (3%)</td>
<td>Pakistan (7%)</td>
</tr>
<tr>
<td>5th</td>
<td>Saudi Arabia (3%)</td>
<td>Bangladesh (3%)</td>
</tr>
<tr>
<td>6th</td>
<td>Sri Lanka (2%)</td>
<td>United States (2%)</td>
</tr>
<tr>
<td>7th</td>
<td>Malaysia (2%)</td>
<td>Ghana (2%)</td>
</tr>
<tr>
<td>8th</td>
<td>Indonesia (2%)</td>
<td>United Arab Emirates (1%)</td>
</tr>
<tr>
<td>9th</td>
<td>Singapore (2%)</td>
<td>Hong Kong (1%)</td>
</tr>
<tr>
<td>10th</td>
<td>Pakistan (2%)</td>
<td>Turkey (1%)</td>
</tr>
</tbody>
</table>

Please note that we excluded Onshore Internationals from this analysis. In Australia, Onshore International is the 2nd top market, in New Zealand it is the 3rd and in the UK, they are the 2nd top market.
2022 Offer Trends – Market Split

Looking at the top offer markets across the last 5 years, we see interesting trends. The below bump charts show movement in and out of the top 10 offer markets over the past 5 academic cycles.

**ANZ Top Offer markets**
- China and India have been consistently the top offer markets for ANZ institutions.
- Key secondary markets for the upcoming academic cycle so far are Vietnam, Saudi Arabia, Sri Lanka, Malaysia and Indonesia.
- Recent years have seen high volumes of offers made to Singapore, Nepal and Nigeria. Offers to Pakistan continue to decline.

**UK Top Offer markets**
- Top offer markets for UK institutions have consistently been China, Nigeria and India.
- Key secondary offer markets for the upcoming academic cycle so far are Ghana, the United States, Thailand, Kenya and Pakistan.
- Recent years have seen high volumes of offers made to Bangladesh, UAE, Saudi Arabia and Turkey.
Detailed Market Insights

We investigate 4 secondary markets to provide a deeper view into the trends and how to best engage and convert these offer holders:

- Sri Lanka
- Vietnam
- United States
- Pakistan
ANZ Institutions - Market Snapshot: Sri Lanka

For **QSES ANZ partner institutions**, Sri Lanka is the 6th top offer market for this next academic cycle. Sri Lanka has a high offer to enrolment conversion rate and for the previous academic cycle, it was the 3rd highest enrolment market overall. Below, we aggregated the global client group data for ANZ and the UK to widen the view of Sri Lanka for our partners.

**Global Enquiry Trends:**
Webforms and prospect lists are the main sources of new enquiries.

**Global Offer Trends:**
Level of study split: 44% UG, 55% PG and 1% Other
Outbound channel preferences for communications from their chosen institutions*

<table>
<thead>
<tr>
<th>Communication Channel</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>90%</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>69%</td>
</tr>
<tr>
<td>Phone Call</td>
<td>37%</td>
</tr>
<tr>
<td>SMS/Text Message</td>
<td>27%</td>
</tr>
</tbody>
</table>

*Source: QS ISS 2021

**QSES Insights:** Sri Lankan prospects prefer to make direct enquiries via webform. There is a strong preference to receive email communications supplemented with WhatsApp, phone calls and text messages. QSES advisors have found that ensuring a timely and personalised response with clear call to actions yields the strongest 1-1 engagement following their initial enquiry. During 1-1 conversations, Sri Lankan prospects are typically interested in accommodation recommendations and information around course costs.
**ANZ Institutions - Market Snapshot: Vietnam**

For **QSES ANZ partner institutions**, Vietnam is the 4th top offer market for this next academic cycle. Vietnam has a high offer to enrolment conversion rate and for the previous academic cycle, it was the 4th highest enrolment market overall. Below, we aggregated the global client group data for ANZ and the UK to widen the view of Vietnam for our partners.

**Global Enquiry Trends:**

Events and prospect lists are the main sources of new enquiries.

**Global Offer Trends:**

Level of study split: 50% UG, 40% PG and 10% Other

Outbound channel preferences for communications from their chosen institutions*

- **Email**: 90%
- **Facebook**: 57%
- **Real time chat on university website**: 32%
- **Phone Call**: 28%

*Source: QS ISS 2021

**QSES Insights:** Vietnamese prospects engaged with events and other marketing campaigns as their first point of enquiry to ANZ institutions in 2021 with virtual fairs and, where possible, in-country high school visits attracting the highest volume of leads. They have a strong preference to receive email communications supplemented with Facebook, live chat and phone calls. QSES advisors have found that the most common questions are related to specific course information and application processes. Ensuring there are up-to-date course specific USP’s and a seamless application process will not only create a great customer experience, but also increase your pipeline of quality applicants.
UK Institutions – Market Snapshot: USA

For QSES UK partner institutions, the United States is the 6th top offer market for 2021/2022 intakes. The USA has a high offer to enrolment conversion rate and for the previous academic cycle, it was the 4th highest enrolment market overall. Below, we aggregated the global client group data for ANZ and the UK to widen the view of the USA for our partners.

QSES Insights: Institutions engage with American prospects quite differently compared to other key source markets. American prospects have a strong preference to receive email communications supplemented with phone, SMS and live chat. QSES advisors have found that deploying 1-1 comms with American prospects, especially PG prospects, engages them and has a higher influence to convert. American prospects tend to have very specific course questions and respond well to opportunities to speak to knowledgeable course representatives.
For **QSES UK partner institutions**, Pakistan is the 4th top offer market for 2021/2022 intakes. Pakistan has a high offer to enrolment conversion rate and for the previous academic cycle, it was the 5th highest enrolment market. Below, we aggregated the global client group data for ANZ and the UK to widen the view of Pakistan for our partners.

**Global Enquiry Trends:**
Prospect lists and webforms are the main sources of new enquiries.

**Global Offer Trends:**
Level of study split: 22% UG, 77% PG and 1% Other

Outbound channel preferences for communications from their chosen institutions*

- Email: 84%
- WhatsApp: 71%
- Phone Call: 39%
- Facebook: 31%

**QSES Insights:** Pakistani prospects use webforms to submit new enquiries. They have a strong preference to receive email communications supplemented with high usage of WhatsApp, phone calls and Facebook. QS advisors have found that Pakistani prospects tend to be funding sensitive and respond well to messages about scholarship opportunities and the chance to speak to university representatives about this.
Thank you.

We hope this analysis of the QSES global client group offer dataset helps inform your prioritisation and conversion strategies for the upcoming intakes. For more information on this report, please contact your Client Success team.