COVID-19 IMPACT ON STUDENTS AND INSTITUTIONS
Has the coronavirus affected your plans to study abroad? (% saying ‘Yes’)

**Uncertainty**

% of students saying ‘Don’t know’ has increased from around 13% to 30%
How has it impacted students

Which of these best describes how the coronavirus has changed your plans to study abroad?

(Since April)

Other?
- General uncertainty – wait and see
- Waiting on other criteria like language testing
- Changing plans – online study, study locally etc
Most institutions are expecting a decrease in applications. How can they adjust?

**Efficiency**
With fewer applications, the ability to effectively manage the applications you do get will be essential.

How do you expect the coronavirus to affect the number of student applications at your institution?

- **Increase** 23%
- **No change** 51%
- **Decrease** 21%
- **Don’t know** 5%
HOW HAS IT IMPACTED INSTITUTIONS?

8 face-to-face student recruitment events pivoted to virtual events:

- Schools = 57
- Virtual Rooms = 128
- Candidates = 291

Digital activities have become more important

Nearly all institutions see the growing importance of online activities, with events, marketing and one-to-one meetings all receiving more attention.

- **Digital events**: 76% More important, 17% Not applicable, 7% Less important
- **Digital marketing**: 73% More important, 18% Not applicable, 9% Less important
- **Qualified one to one online meetings**: 71% More important, 19% Not applicable, 10% Less important
- **Lead generation**: 49% More important, 35% Not applicable, 16% Less important
- **Qualified one to one in person meetings**: 22% More important, 33% Not applicable, 45% Less important
- **In person Events/ Fairs**: 14% More important, 27% Not applicable, 59% Less important

[Link to QS Covid-19 resources updates](https://www.qs.com/covid-19-resources-updates/)
COVID-19
MAINTAINING
THE
ENROLMENT PIPELINE
Traditionally, institutions had about a year to nurture their prospects and most international recruitment strategies included in-country visits, campus tours, open days and face to face experiences – how can you replace these?

- Average 10 month enrolment journey
- Average 3-5 inbound comms
- Average 15-30 outbound comms
UNDERSTAND THE MARKET SHIFTS

JAN-MAR 2020

YOY TRENDS

Overall enquiries are slightly down

Inbound communications are up

Market diversification is noticeable

Demand is shifting (pathway and foundation ^)

Communications channels continue to vary

FAQs remain the same

VOLUME OF NEW PROSPECTS IS NOT LETTING UP ANYTIME SOON. THEY ARE STARTING THEIR JOURNEYS EARLIER. THEY ASK MORE QUESTIONS AND ARE INTERESTED IN A BROADER RANGE OF COURSES. BUT THEY ARE ASKING THE SAME FAQS.
PERSONALISE YOUR COMMUNICATIONS

What informs content, messaging and personalisation?

2019 Enquiry & Enrolment Data

- Markets (nationality)
- Lead Source (channels)
- Demand & Motivations (level of study)
- Pipeline (comms to enrolment)

Need to be reviewing and revising!

TO NURTURE A SMALLER NUMBER OF PROSPECTS IN A MORE COMPETITIVE ENVIRONMENT, A DEEP UNDERSTANDING OF WHO THEY ARE AND WHAT THEY WANT IS ESSENTIAL (AND IT MAY BE DIFFERENT TO WHAT IT ONCE WAS!)
MAINTAINING THE ENROLMENT PIPELINE

1. Timing and cadence will be key in the enrolment journey. Maintain frequent communications, and look for opportunities to replace F2F events with digital equivalents.

2. Use your CRM to understand any potential changes in your enquiry market, personalise comms and use content, USPs, images, videos strategically. Leverage student preferences and communicate 1-1.

3. Be smart about your most precious resources – your staff. Where are the bottlenecks along the journey and where will you get the greatest return?

NOW IS NOT THE TIME TO TAKE YOUR FOOT OFF THE ACCELERATOR – YOUR COMPETITORS AND NEW ONLINE PLAYERS WON’T BE!
WHO WE ARE

The student Journey

- Research
- Lead Management
- Offer Conversion
- Application and Pre Assessment
- Enrol
- Retain
- Enquire

QSES prospective student surveys
Student Engagement and Retention