



Client Group Monthly Insights

March 2018

ENROLMENTSOLUTIONS

2017 Enquiry trends: what do they mean for 2018/19 enrolments?

As your recruitment and conversion partner, QS Enrolment Solutions (QSES) has insights to share based on recent analysis of our client group's 2017 international enquiry data. We believe international enquiry data to be a good (but not perfect) indicator of future enrolment trends in subsequent intakes, and we hope this report will prove valuable as we progress our conversion strategies together in 2018 and 2019.

For 2017 we saw a 12.8% increase in 2017 enquiry volumes within the client group. However, this growth varied enormously by markets and this variation will have a significant impact on projected enrolment numbers from key markets in 2018/19.

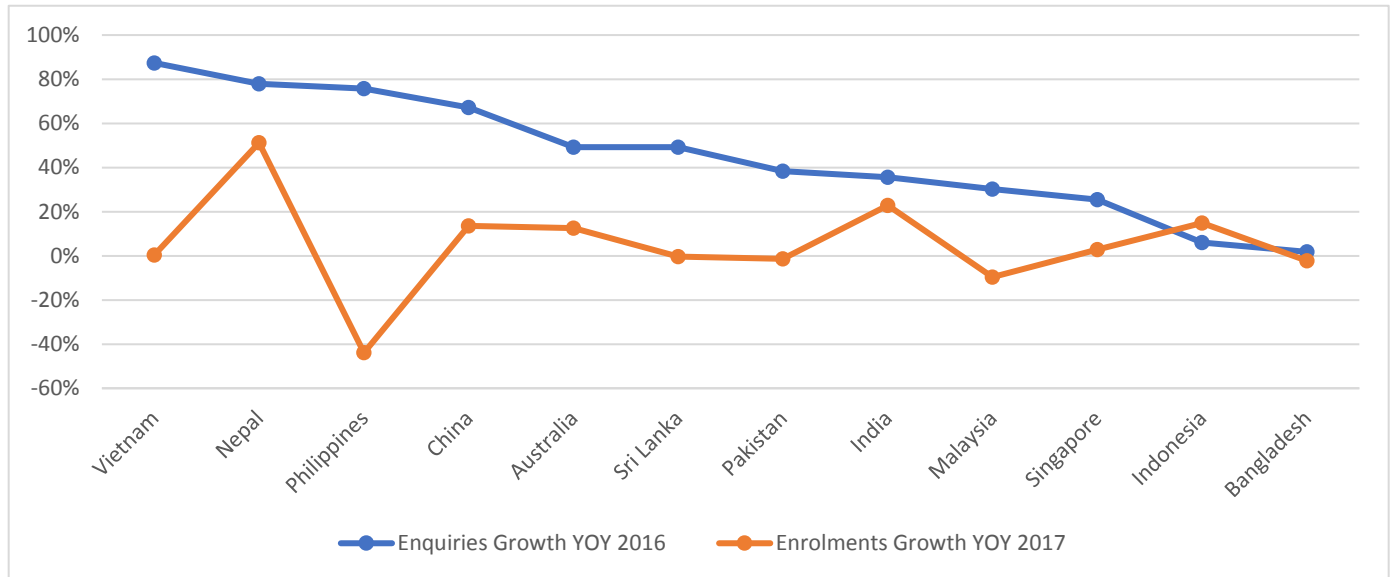
The current average pipeline from first enquiry to enrolment for international prospective students is 13.3 months for the client group. In other words, the average international prospective student takes over a year to apply and enroll, from their first enquiry.

Based on trends in 2017 enquiry data, in 2018/19 we expect to see enrolment growth from Nepal, India, Sri Lanka and Indonesia.

We also expect to see a decline in enrolments from China, Singapore, Malaysia and Vietnam.

2016 enquiries predicted 2017 enrolments, but they're not foolproof

Using the 13.3-month pipeline, we looked back at 2016 enquiry growth trends to see how they compared to 2017 enrolments:



A few standout trends:

- Growth in enquiry demand from specific markets will not necessarily mean a corresponding increase in enrolments from these markets the following year, as seen most emphatically in Vietnam and the Philippines
- Enrolment growth typically doesn't match the growth rate of enquires, suggesting a lower conversion rate occurs when enquiry volumes grow
- Nepal, India and Indonesia have the greatest enrolment growth rates versus the preceding year's enquiry growth. This suggests that further mining into your institution's enquiry numbers for these markets may show that targeted conversion campaigns could bear increased enrolments from these markets.

2017 Enquiry Trends

To understand how 2017 enquiry trends will impact 2018/19 enrolments we needed to:

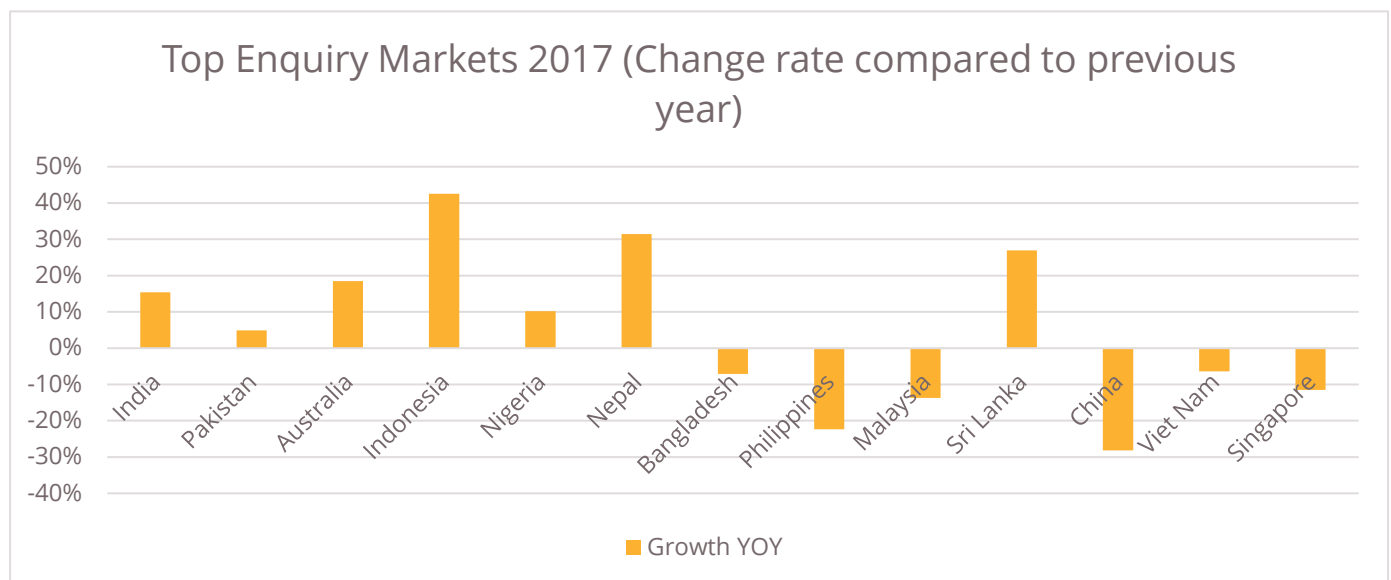
- Identify the top enquiry markets in 2017,
- Drill down into the enquiry growth markets and
- Identify the emerging enquiry markets.

We then used this data to predict which enrolment markets will be up and which will be down in 2018/19.

Top Enquiry Markets (2017)

Change in enquiry volume in 2017 compared to previous year:

- China (-28.2%)
- India (15.4%)
- Pakistan (4.9%)
- Australia (18.5%)
- Indonesia (42.5%)
- Nigeria (10.2%)
- Nepal (31.4%)
- Bangladesh (-7.1%)
- Philippines (-22.3%)
- Malaysia (-13.7%)



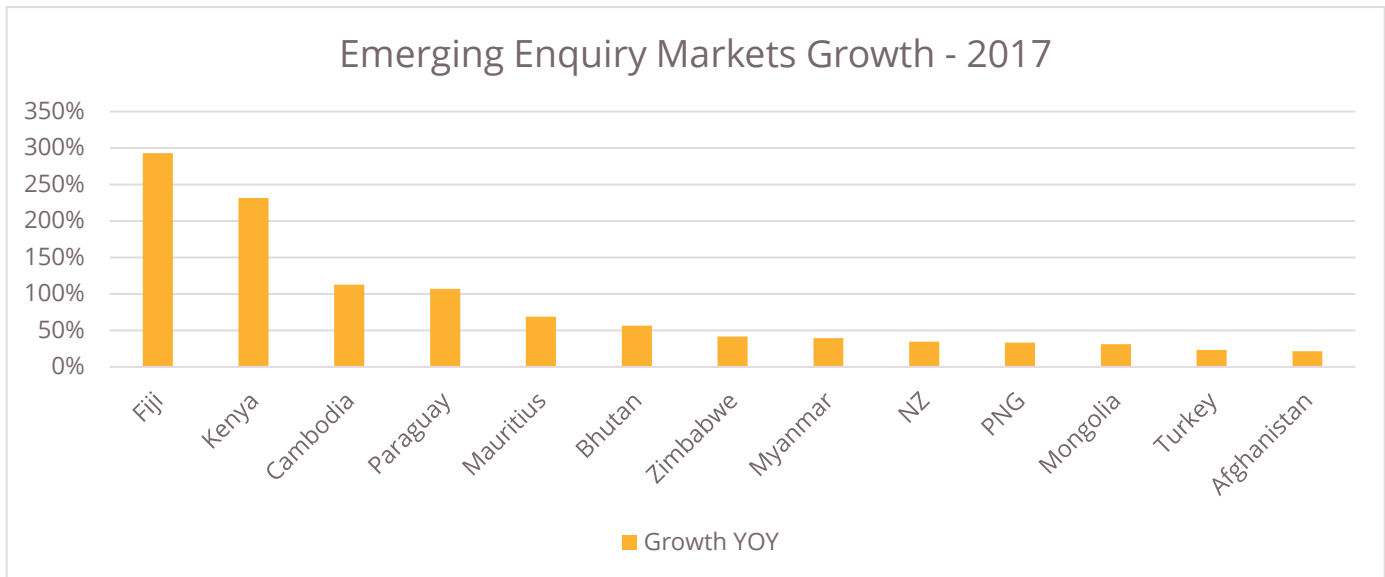
Key considerations about 2017 top enquiry markets:

- South Asian countries of India (15.4%), Nepal (31.4%), and Sri Lanka (27.0%) showed the highest enquiry volume growth.
- China dropped out of the top enquiry 10 markets with a -28.2% drop in enquiry volume, this makes China the worst performing key market YOY. We know that many universities treat Chinese recruitment using different approaches to other markets, so it is difficult to assess how much of this drop is due to strategy changes, rather than falling demand, but with China's importance to our client group, it is important to call out this drop.
- Top ASEAN markets overall showed only slight growth, with Malaysia (-13.7%), Vietnam (-6.4%) and Singapore (-11.5%) all declining.

Emerging Enquiry Markets (2017)

We define our emerging markets by identifying which of our mid-volume enquiry markets (outside the top 10, but with a reasonable overall volume) are on the rise YOY.

In 2017, this group of markets predominantly sat outside of our top 25 markets overall.



Key considerations about emerging enquiry markets:

- We saw enormous growth in interest from Fiji and Kenya, but we are not yet convinced that these will convert to enrolment in great numbers.

What does this mean for 2018/19 Enrolment Markets?

Steady

Market-by-market enquiry growth over 2017 was mostly double-digit, in either direction. Not many markets had a single digit percentage growth or decline.

- Of key markets, Pakistan (4.9%) and Nigeria (10.2%) experienced steady growth and we would expect this to be reflected in enrolment figures for 2018/19.
- Of emerging markets, Iran (6.6%), and Ethiopia (5.4%) experienced steady growth.

Up

- Nepalese enrolment growth in 2017 was an outstanding 51%. We expect to see growth in enrolments again in 2018/19, based on 2017 enquiry growth of 31%.
- There's a similar trend for India which recorded 15% enquiry growth in 2017, which will build on 23% growth in enrolments in 2017.
- Indonesia enrolment growth is expected to increase strongly in 2018/19 based on 2017 enquiry growth of 42.5%.
- Sri Lanka's 27% growth in 2017 enquiries is fuel for enrolment growth in 2018/19.

Down

- Our #1 enrolment market of China experienced a 28% drop in enquiry volume in 2017. We are flagging potential for negative growth in Chinese enrolments in 2018. We recommend that institutions keep a close eye on application volumes from Chinese prospects in early 2018 to see how pipelines are being affected, as we see potential for a decline in Chinese demand in 2018/19.
- Singapore is at risk of experiencing a similar negative swing, if not to the same degree – enquiries were down 11.5%.
- Vietnamese, Bangladeshi, and Malaysian 2017 enquiries all dropped, flagging a risk of declining enrolments in these key markets in 2018/19.

Next report: April 2018

For our next Client Group Monthly Insights installment, we look forward to providing our client group with benchmarking analyses exploring: average pipeline length from enquiry to enrolment for key markets; average pipeline difference by institution; and why understanding these matters.

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Report created by the QSES Market Intelligence Team.

For more information on how to apply these findings to your conversion strategy for this year, please contact your Senior Account Director or Client Delivery Manager.