Trends in International Student Mobility

A comparative study of international student choices, motivations and expectations 2009-2013

QS WORLD GRAD SCHOOL TOUR APPLICANT SURVEY

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Scope of the report

In recent years, the field of international student recruitment has come to occupy an ever more central position for higher education strategists and decision-makers. This diverse, dynamic and increasingly competitive sector is of significant economic value for individual higher education institutions (HEIs) and also for wider national economies, both in established study destinations and emerging ones. As more countries and HEIs make international student recruitment a priority, it's been noted that the distinction between 'recruiting' and 'recruitment' countries is blurring, and that already unprecedented levels of competition in the field only look set to increase.[1]

Amongst the emerging body of research into the most effective strategies for international student recruitment, there's growing recognition of the importance of targeting recruitment messages to more specific segments of the international student market.[2] The art of international student recruitment is progressively more complex and creative, challenging stakeholders to establish and maintain an effective presence across multiple platforms (both online and off), create compelling messages targeted to different and distinct target groups – and at the same time work towards integration, brand consistency and of course budget efficiency.

Within the emerging body of reports, articles, blog posts and commentary on the best ways to achieve all of this, there is one point of agreement: those involved in international student recruitment need to know more about the priorities, needs and decision-making processes of their target audiences. As yet, the body of knowledge available about international applicants and their motivations remains limited. This report aims to contribute to this essential field, specifically focusing on international students applying for degree courses at graduate level.

Based on global surveys of attendees of QS World Grad School Tour events and/or applicants for QS Scholarships for graduate study between 2008 and 2013, the survey data collected provides insights into applicants' preferred study destinations and subjects, the factors they identify as most important for them when making choices about their education, and their expectations and hopes for the future. The span of the data collected also makes it possible to identify emerging trends in how these factors have changed over the five-year period considered, and how the sector may continue to develop.

[1] See, for example, 'International student recruitment: policies and developments in selected countries', Nuffic, January 2012, www.nuffic.nl.
[2] See, for example, 'Student Segmentation for an Effective International Enrollment Strategy', WES Research & Advisory Services, September 2013, www.wes.org.

Methodology and samples

This report is based on a comparative analysis of two large global surveys of students applying for graduate-level courses worldwide, conducted in 2008-2009 and 2012-13[3]. During these periods, survey respondents attended a QS World Grad School Tour event, and/or applied for a QS Scholarship for graduate-level study. Both schemes are targeted at students seeking to apply for Masters and PhD programs at local or international universities, with a particular focus on studying a graduate degree abroad.

Respondents completed an online questionnaire, covering key issues relating to their graduate and international study plans. Data collected included information about their desired subject of study; preferred study destination; most important factors when choosing a country, course and institution; current employment/education situation; and future career aims and expectations. A total of 3,358 candidates completed the entire survey in 2008-9 and 4,155 in 2012-13 (for demographic data see Section 2).

The results provide insights into the preferences and motivations of prospective graduate-level students worldwide, and (given the focus of the QS events and scholarships) especially those with an interest in studying outside of their own country. The following report is based on a comparative analysis of the two sets of survey results, with the aim of highlighting trends in the choices being made by prospective international students worldwide, and the factors underlying those decisions.

[3] Throughout the report, these two surveys are referred to as the 2009 and 2013 surveys.

Summary

This report aims to add to the body of knowledge available about international students' preferences and motivations, specifically at graduate level. The information provided should be of interest and value to those directly involved in student recruitment, as well as anyone with an interest in the internationalization of higher education. As well as giving an overview of globally observable trends, variations by world region, age and gender are also highlighted where a noteworthy difference is evident. The information provided should help those engaged in international student recruitment to ensure the messages and resources they provide are tailored to match applicants' driving concerns and priorities.

Key findings:

- **International students are considering a broader range of study destinations.** While the big four Anglophone destinations remain among the most popular, they are losing their monopoly. Meanwhile other countries – notably Germany, but also a broad spread of other countries worldwide – are gaining in prominence as potential study destinations.
- **Study costs, financial aid and post-graduation employment prospects are becoming increasingly important factors.** Employment prospects are an especially important issue for younger applicants, who face the task of establishing a career in a jobs market that remains challenging in many countries.
- **'International recognition' remains the single most important criteria for students when choosing a country and institution, but this is declining.** This may reflect the fact that a much broader selection of countries and institutions now enjoy global visibility in the higher education world, meaning students' decisions are increasingly focused on other more distinguishing factors, especially those relating to costs, funding and career prospects.
- **Graduate degree applicants have high expectations for career development and salaries – and they expect to work hard too.** In the 2013 survey, the majority saw themselves in 10 years' time either running their own business (24%), director of a large company (17%) or CEO of a large company (15%). Almost 18% identified an annual target salary of more than US$100,000. These ambitions are accompanied by expectations of long working hours; almost 85% said they expected to work more than a 'standard' 40-hour week in their first job after completing a graduate degree, with more than 40% expecting upwards of 50 hours per week.

SECTION 1: Choices and motivations

The survey asked respondents to identify which countries they were interested in studying in (they could choose as many as applied), and the subjects they were applying for (up to three choices). They were also asked about the reasons underlying their choice of study destination, their primary motivation for taking a graduate-level degree, and the most important factors they would consider when choosing an institution.

Most popular study destinations

- While the big four Anglophone destinations (US, UK, Australia and Canada) remain among the most popular choices, all declined in popularity between 2009 and 2013.
- Germany strengthened its position, climbing from 7th most popular in 2009 to 4th in 2013 – the biggest increase in popularity in this period.
- Students are particularly likely to be considering studying abroad within their own world region, reflecting the regionalization of higher education.

Most popular subjects

- FAME subjects (including finance, accounting, management, economics, administration and related fields) remain the most popular among our survey respondents – but to a lesser extent than in 2009.
- STEM subjects (science, technology, engineering and mathematics), which remain the second largest group for our respondents, have grown in popularity over this period.

Motivations and priorities

- International recognition of qualifications remains the most important factor identified by students when choosing a study destination – but was chosen by slightly fewer respondents in 2013 compared to 2009.
- Availability of scholarships/financial aid was selected by more respondents in every region in 2013 compared to 2009, as a key factor when deciding on a destination country. Likewise, more respondents said they were considering program cost when choosing a course.
- In most regions, the prospect of staying on to work after graduation also increased as a motivating factor between the two survey years. The perception that graduates of a particular institution have good career and employment prospects also grew in importance.

Most popular study destinations

Our survey respondents' top study destination choices largely reflect the latest data on actual international student numbers. According to UNESCO data from 2010, the leading destination countries for international students were the US (16.6%), UK (13%), Australia (6.6%), Germany (6.4%), France (6.3%) and Canada (4.7%) – the same top six destinations chosen by our survey respondents, though in slightly altered order.

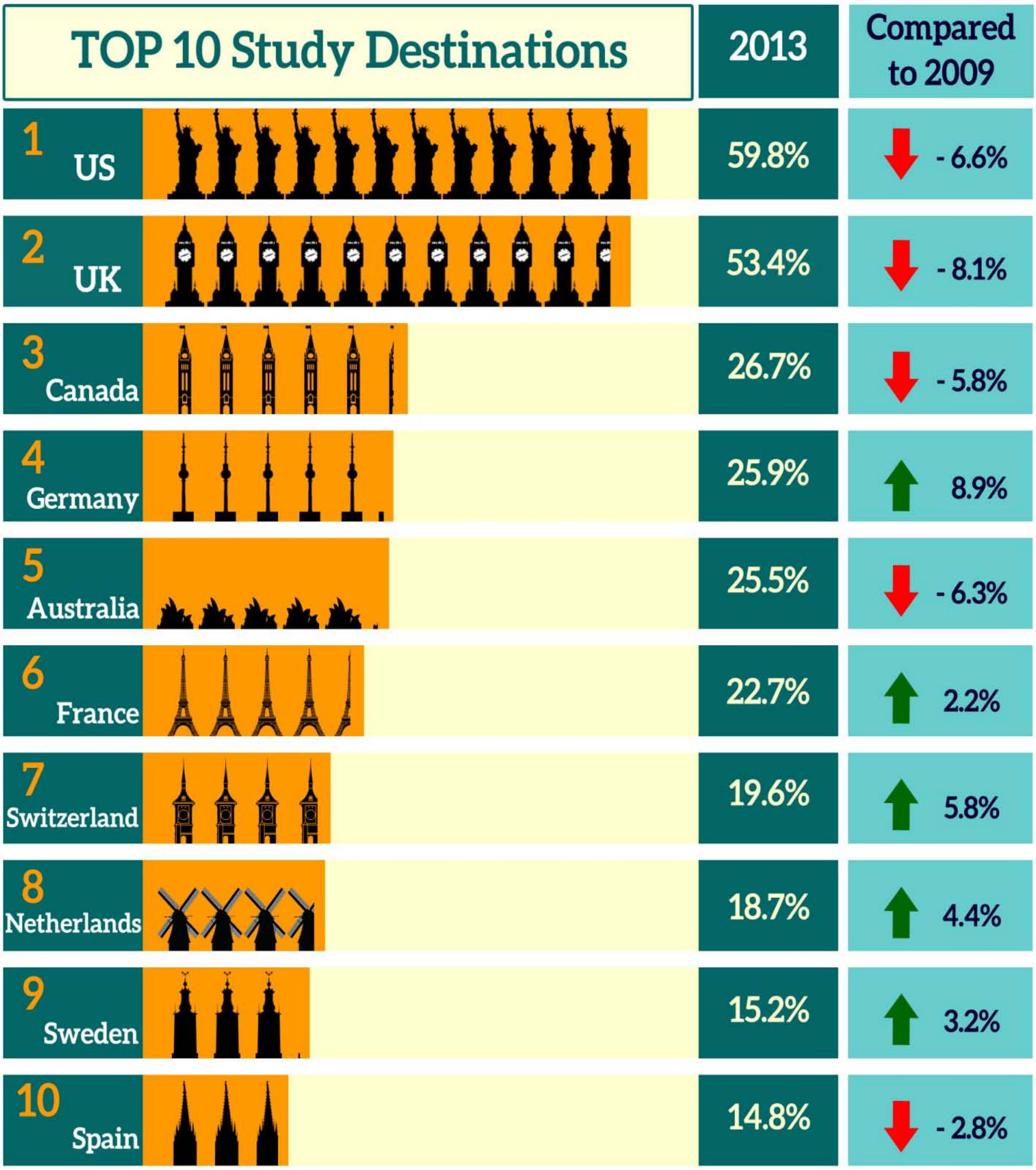

Image 1: In which countries are you considering studying?

Declining popularity of the big four Anglophone destinations

Comparing responses from the 2009 and 2013 surveys, one of the most significant trends is the decline in popularity of the big four Anglophone destinations. While the US, UK, Australia and Canada remain among the most popular countries, all received fewer responses in 2013 compared to 2009.

Again this reflects observed trends in the market, with the 'big four' gradually accounting for a smaller percentage of the total number of international students. UNESCO data shows that while just under half (47.8%) of all international students were studying in the US, UK, Australia or Canada in 2004, this had fallen to 40.3% in 2012. All four have continued to increase their total numbers of international students during this period – just not at the same pace as the overall number of internationally mobile students has grown.

Growing popularity of Germany

The loss in market share experienced by these four Anglophone countries is in part due to the growth in popularity of alternative study destinations – notably Germany, which saw the largest increase in popularity in the QS surveys, selected by more than a quarter of respondents in 2013 compared to 17% in 2009. Other countries which gained in popularity over this period include France, Switzerland, the Netherlands, Sweden, New Zealand, Denmark, Norway and Finland. Spain, Italy and Singapore all declined. Many of these trends are consistent with the growing importance of study costs and post-graduation career prospects for students when choosing a destination (see the next section).

Growing regionalization of higher education

Overall, the results show international students considering a much broader range of destinations, and this is partly linked to the acceleration of regionalized international student mobility.[4] Most study destinations enjoy strongest popularity among respondents within their own world region – and in some cases the impact of regionalization is particularly evident. A good example of a beneficiary of this trend is the United Arab Emirates (UAE). In 2009, only 2% of survey respondents in each world region said they were considering the UAE as a study destination; in 2013, this had grown to almost 10% of respondents in the Middle East and Africa, and 3-5% in each other region.

[4] As observed, for example, in 'International student recruitment: policies and developments in selected countries', Nuffic, January 2012, www.nuffic.nl.

Most popular subjects

Overall, the two survey years show relative stability in terms of the subjects respondents said they were interested in studying at graduate level. The top five subject areas for the two years are remarkably similar (with just a slight change in the wording used for the international relations option). Again, the preferences expressed by our survey sample largely correlate with figures of actual graduate-level enrolments worldwide. For example, in the UK, almost a quarter of full-time postgraduate students in 2011-12 were taking courses in business-related subjects (including accounting, finance and management) – making this by far the most popular subject group at graduate level.[5] Similarly, in the US, business accounts for the largest segment of graduate-level students; as of 2010-11, 26% of master's degrees awarded were in business.[6]

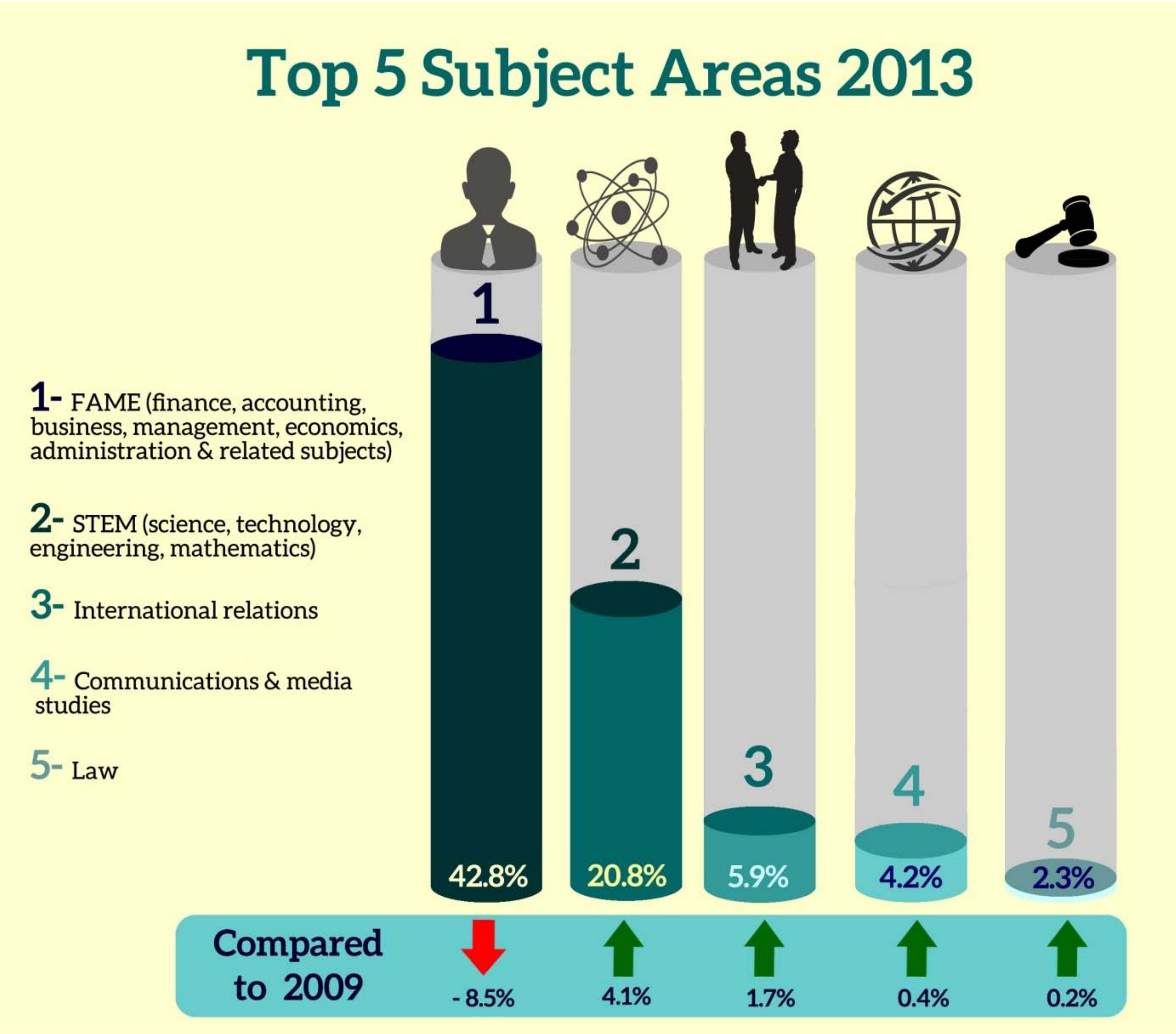

Image 2: Select up to three programs you are considering studying.

[5] Data from the Higher Education Statistics Authority (HESA), hesa.ac.uk.
[6] Data from the National Center for Education Statistics, nces.ed.gov.

Fall in popularity of FAME subjects, increase for STEM

The largest group, the FAME field (including finance, accounting, business, management, economics, administration and related subjects) remained by far the most popular among our respondents – though received a significantly lower proportion of selections in 2013 compared to 2009, decreasing from more than half of all choices to less than 43%. This may be at least partly explained by changes in the demographics of QS World Grad School Tour attendees – the basis of the survey samples (see Methodology and Section 2 for more information).

Conversely, the STEM group (including natural and life sciences, technology, engineering and mathematics) grew in popularity across the two survey years. This increase is again likely to be at least partly linked to the changing demographic of QS World Grad School Tour attendees, but is also interesting to consider in light of recent years' media coverage of STEM disciplines; many countries worldwide have been reporting shortages of STEM graduates in the past few years, and there's been widespread publicity of the demand and opportunities available within these fields.[7]

Where are all the teachers?

One notable point of divergence between the QS survey respondents and actual graduate enrolments is in the education/training sector. While this field is within the top 10 subjects chosen by respondents in both survey years, numbers are much lower than those reported in actual graduate-level enrolment figures. In both the US and UK, the largest groups of graduate students outside of the business sector are those studying education, including teacher training; in the UK, 13% of postgraduate students were studying in this category, while 25% of US master's degrees were awarded in this field.[8]

This loss of correlation is again largely explained by the survey sample, in this instance by the fact that the QS World Grad School Tour has a strong focus on international study, and most attendees are at least considering studying abroad. Those studying education/teacher-training are less likely to be studying outside of their own country, especially if their intention is to work there as a teacher afterwards.[9]

[7] Examples: in the US, presidential advisors called for an additional 1 million STEM graduates in the next decade from 2012; the UK's Royal Academy Engineering forecast demand for 830,000 SET (science, engineering and technology) professionals and 450,000 SET technicians between 2012 and 2020; in Germany, the Cologne Institute for Economic Research estimated in 2013 that the country already has a shortage of 210,000 graduates in 'MINT' subjects (mathematics, engineering, science and information technology). Similar reports and statistics have emerged worldwide.

[8] UK data from HESA refers to 2011-12; US data from NCES refers to 2010-11.

[9] See, for example, the latest Open Doors data on fields of study declared by international students in the US.

Motivations and priorities

While international recognition of qualifications remains the top motivating factor for students in our surveys, this was selected by fewer respondents in 2013 compared to 2009. Meanwhile other important factors seem to be gaining in prominence – most notably study costs and access to financial aid, and post-graduation employment prospects, both in terms of the career value provided by a particular institution, and immediate post-graduation employment prospects in the chosen study destination.

International recognition remains students' top priority – but declining in importance

The decline in the percentage of respondents choosing 'international recognition of qualifications' as one of their top priorities when choosing a study destination parallels the diversification of the sector, with a larger selection of countries establishing strong international reputations in higher education. As a result, this may gradually become less of a critical factor for students – not because it is less important, but because it's more widely available and therefore less of a distinguishing element.

A possibly related trend is the increase in students who said the location of their 'target school' was a key factor in their choice of country, which suggests more applicants are choosing a specific institution, rather than deciding on a general destination first. This reflects the growing global visibility being attained by more individual universities; thanks to the acceleration in the availability of and access to online information, combined with international marketing and recruitment campaigns, it's no longer the case that only a handful of prestigious institutions can claim international stature.

In 2012-13, only 2.1% of international students in the US (at all levels) were majoring in education – far less than the majority of subject areas.

	Top 10 Motivations	2013	Compared to 2009
1	International recognition of qualifications	17.7%	- 0.6%
2	Cultural interest & lifestyle	15.2%	- 1.7%
3	Scholarship/financial aid availability	13.8%	1.6%
4	Would like to work there after graduation	12%	0.8%
5	Location of target school	10.8%	1.3%
6	Improve language skills	10.1%	- 0.7%
7	Network creation	8.1%	- 1.5%
8	Visa situation	4.2%	2.1%
9	Proximity to current location	3.5%	0.1%
10	Family connections	3.4%	- 1.2%

Image 3: Identify the reasons for your top-choice study destination.

Cost of study playing an increasingly important role in students' decisions

It's hardly surprising to find that study costs and financial aid availability are becoming increasingly important factors for students when choosing both a country and a specific institution/program. This corresponds to the relative decline in popularity of the leading Anglophone study destinations; HSBC's 2013 analysis of publicly available data confirmed that Australia, the US, the UK and Canada are the world's first, second, third and fifth most expensive destinations for international students respectively (fourth was the United Arab Emirates).[10] Meanwhile Germany, with average annual fees of just US$635, was by far the cheapest of the 13 countries assessed – and the country's rapidly increasing popularity among our survey respondents suggests that prospective international students are well aware of fees differences, and that this is impacting on their choices.

More applicants considering post-graduation employment prospects

Our surveys also suggest that students are increasingly considering post-graduation employment prospects when deciding where to study – both in terms of choosing a destination with the potential for employment immediately upon graduation, and in selecting an institution with a strong reputation among employers. In most regions, the percentage of respondents selecting 'would like to work there afterwards' as a factor when choosing a country increased; likewise the perception that 'graduates from the institution have good career and employment prospects' as a factor when choosing a specific program.

This again helps explain the growing popularity of Germany. While, in the continued wake of the 2008 financial crisis many European countries are still reporting high levels of unemployment, Germany has retained a relatively strong economy and labor market. As of 2012, Germany has also made it easier for international students to stay on and seek work after graduating. Survey respondents within Europe were most likely to be motivated by post-graduation work prospects when choosing a destination country; between the two survey years, the percentage of European students citing this factor increased from 47% to 57%, more than in any other region.

[10] HSBC, August 2013.

Variation in priorities by region, age, gender and study level

- Students in the US and Canada were the group most likely to cite family connections and proximity to current location as impacting on their choice of country, and least likely to cite opportunities to improve their language skills – consistent with this group's preference of staying closer to home.[11]
- Younger applicants were more likely to be motivated by the chance to improve their language skills, consistent with a general tendency for language-learning to be pursued at an earlier stage in life.
- Younger applicants were also more likely to be motivated by the chance to stay on in the destination country to work after graduation, and by perceptions of strong employment prospects at a particular institution. It seems employment and career prospects are especially important for younger applicants.
- Older applicants were more likely to want a destination close to their current location, and also more likely to cite 'family connections' as a key factor; this is consistent with many older applicants already having an established career and family life, while younger applicants have yet to establish this base and are therefore more open to opportunities further afield.
- The youngest age group (21-24) recorded the largest increase in the importance of the chance to 'create a network' when choosing a study destination – selected by 29% of applicants in this group in 2013, from 17% in 2009. This is consistent with an increased focus on career prospects from a younger age. Meanwhile this factor actually declined in importance among all other age groups, most so in the oldest two age ranges (35 and above).
- Motivation and priority trends were almost identical for male and female respondents. The exceptions to this were that male applicants were more slightly likely to report being motivated by opportunities to build a network, and women slightly more likely to cite opportunities to improve language skills and cultural interest/lifestyle.
- Survey respondents were also asked to identify their main motivations for taking a postgraduate program in the first place. Responses from Masters and PhD applicants were very similar; for both sets of applicants, the top two motivations were 'To improve my employment prospects' and 'To progress in my current career path'. For Masters applicants the next most important factor was 'To enable me to progress to a higher level qualification', followed by 'Personal interest'. For PhD applicants, 'Personal interest' was the third strongest factor, followed by 'To enable me to pursue a career in academia'.

[11] In the 2013 survey, more than 90% of respondents in the US and Canada were interested in studying in either the US or Canada – though many were also interested in destinations further afield as well.

SECTION 2: Backgrounds and expectations

Who were our survey respondents?

As detailed in the methodology, survey respondents were applicants for QS Scholarships for graduate study and/or attendees of the QS World Grad School Tour, a series of international higher education recruitment fairs organized by QS around the world, targeted at students with an interest in studying a Masters or PhD abroad. The 2008-9 survey received a total of 3,358 fully completed responses, and the 2012-13 survey 4,155 responses, with respondents coming from 194 different countries in 2009 and 132 countries in 2013.

Overall Demographics		2009	2013
AGE	21-24 years	1.9%	51.9%
	25-29 years	43.8%	31.1%
	30-34 years	36.1%	10.2%
	35-39 years	11.5%	4%
	40 + years	6.8%	2.9%
GENDER	Female	52%	48%
	Male	48%	52%
CURRENT SITUATION	Full-time employment	67%	47%
	Part-time/ temporary employment	12%	13%
	Student	7%	23%
	Student with part-time employment	4%	10%
	Other	10%	8%
REGION	Africa/Middle East	19.3%	19.7%
	Asia Pacific	40.8%	31.8%
	Eastern Europe	12%	12.2%
	Western Europe	9.2%	15.1%
	Latin America	9.2%	13.9%
	US & Canada	9.6%	7.3%

Image 4: Who responded to our surveys?

In each survey year, the two genders were almost equally represented. There is a notable change in the age range of respondents, which is partly linked to the history and development of the QS World Grad School Tour. The very low percentage of respondents aged 24 and younger in the 2009 survey is likely to be largely due to the fact that the World Grad School Tour events were at that time closely linked to the QS World MBA Tour, and typically attended by an older group. Since then, the QS World Grad School Tour has rapidly evolved to attract a broader range of graduate-degree applicants, so that by the 2013 survey, the youngest age group represented more than half of all respondents.

This development and expanding audience of the QS World Grad School Tour is also likely to at least partially underlie the decrease in respondents in full-time employment (from 67% to 47%) over the period, and the corresponding increase (from 11% to 33%) in the number of survey respondents currently studying, either with or without a part-time job.

Age group	Work situation		Compared to 2009
21 - 24 YEARS	Full-time job	32%	↑ 20.5%
	Part-time/ temporary/ other	19%	↓ - 7.9%
	Student	35%	↓ - 18.9%
	Student with part-time job	15%	↑ 7.3%
25 - 29 YEARS	Full-time job	62%	↑ 7%
	Part-time/ temporary/ other	23%	↑ 0.3%
	Student	10%	↓ - 3.8%
	Student with part-time job	5%	↓ - 3.6%
30 - 34 YEARS	Full-time job	71%	↓ - 5.6%
	Part-time/ temporary/ other	20%	↑ 2.1%
	Student	5%	↑ 1.5%
	Student with part-time job	4%	↑ 1.9%
35 - 39 YEARS	Full-time job	78%	↑ 2.8%
	Part-time/ temporary/ other	16%	↓ - 3.3%
	Student	4%	↑ 1.3%
	Student with part-time job	3%	↑ 0.2%
40 + YEARS	Full-time job	62%	↓ - 16%
	Part-time/ temporary/ other	27%	↑ 7.4%
	Student	5%	↑ 4%
	Student with part-time job	5%	↑ 3.5%

Image 5: What is your current work situation?

Aside from factors relating to the survey methodology and the sample source, it's also possible that the increase in younger respondents reflects a growing tendency for students to apply for graduate-level degrees immediately or within a few years of completing an undergraduate program – perhaps a reflection of continuing high levels of competition for graduate jobs in many world regions. In any case, the survey demographics certainly illustrate the diversity of graduate-degree applicants, in terms of both age and current situation.

In terms of notable regional trends, respondents in Europe (both Eastern and Western) were significantly less likely to be in full-time employment, and more likely to be currently studying – a trend which was evident in both survey years.

Targets and expectations after a graduate degree

- Running their own business remains respondents' number one 10-year career goal, followed by director or CEO positions.
- Applicants expect a significant increase to their salaries after completing a graduate degree; in 2013, more than 17% of respondents were aiming at an annual salary above US$100,000.
- Working hours expectations are also high; over 40% of respondents expect to work more than 50 hours per week in their first role after a graduate degree.

Target roles

In the 2013 survey, almost a quarter of respondents said that in 10 years' time they saw themselves running their own business. This was the most popular response to the question in both survey years, but increased slightly from just under 22% of responses in 2009 to just under 25% of responses in 2013 – perhaps reflecting the general buzz around start-ups and entrepreneurship during this period. The next most popular choices were director or CEO positions in large companies; together these roles were selected by almost 32% of respondents in 2013, a slight decrease from 37% in 2009.

	In 10 years' time	Overall (2013)	Gender	
1	Running own business	24.1%	25.4%	22.4%
2	Director in large/public company	17%	17.1%	17%
3	CEO of large company	14.7%	10.8%	18.3%
4	Senior academic	8.7%	9.2%	8.2%
5	Self-employed consultant	7.7%	8.1%	7.4%
6	Partner in professional services	5.8%	7.3%	4.4%
7	Senior manager in public sector	5.2%	5.9%	4.6%
8	Middle manager	5.2%	4.9%	5.4%
9	Senior technologist	3.9%	2.3%	5.3%
10	Other	3.8%	4.5%	3.2%
11	Director in small company	3%	3.8%	2.7%
12	Down-shifting for work-life balance	0.9%	1.3%	0.6%

Image 6: Which option best describes where you see yourself in 10 years' time?

Comparing male and female respondents, 10-year career goals are generally very similar, with some variation within an overall pattern of correlation. Female respondents were even more likely than males to see themselves running their own business (over 25% of females compared to just under 23% of males), but significantly less likely to expect to be CEOs (just under 11% compared to over 18%), while expectations of becoming a director in a large company were almost equally likely to be expressed by either gender (just over 17% of female respondents and just under 17% of males). These 2013 patterns largely reflect those seen in the 2009 survey.

In general, 10-year aspirations were fairly consistent regardless of age, although those under 30 were slightly more likely to be aiming to run their own business or in a senior technologist role, while those over 30 were more likely to see themselves as a self-employed consultant or senior academic. Career goals were also very similar regardless of whether applicants were applying for a Masters or a PhD; as would be expected, the main divergence was that PhD applicants were more likely to see themselves in senior academic roles.

Target salary

Respondents were asked to identify a target annual salary representing their desired earnings after completion of a graduate degree, as well as supplying information about their current salary (if applicable). The overall results suggest graduate-degree applicants aiming at a significant salary increase, with many aiming extremely high. In 2013, almost 18% of respondents identified a target salary of more than US$100,000 per year, with less than 2% reporting this salary level at the time of application. The vast majority (more than 70%) of respondents reported annual earnings of US$20,000 or less at the time of application.

Predictably, there is significant variation in target salary depending on applicants' locations. Those in the US, Canada and Western Europe generally indicated higher target salaries than those in other regions – and US and Canadian respondents had especially high targets. Less than 10% of respondents in this region set a target salary of US$50,000 or less, while more than 35% said they were aiming to earn over US$100,000. In every other region except for Western Europe, more than 20% of respondents set target salaries in the lowest bracket (up to US$20,000), with expectations lowest among Latin American respondents. As would be expected, there was a strong correlation between salary expectations and age, with target salary levels increasing with age. However, there was a strong contingent of ambitious younger respondents; in 2013, almost 28% of respondents in their 20s were aiming at the highest salary bracket, up from less than 10% in 2009.

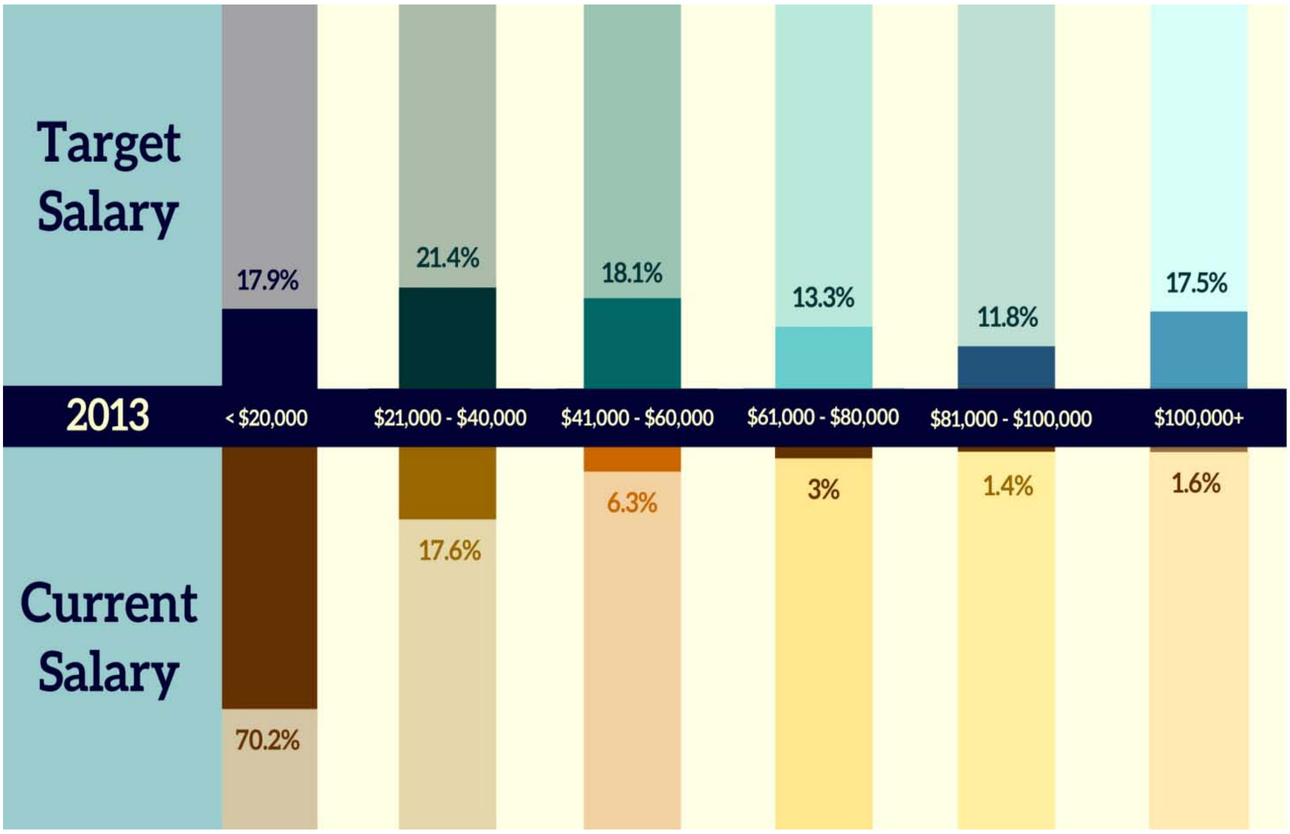

Image 7: What is your current salary? What is your target salary?

Expected working hours

Survey respondents were asked how many hours they expected to work per week in their first job after completing their graduate degree. Overall, the vast majority of respondents expected to be working more than a 'standard' 40-hour week – almost 85% of respondents in 2013. Most (44%) expected to work 41-50 hours per week, but almost as many (41%) expected to be working upwards of 50 hours per week, while almost 5% predicted over 70 hours. These patterns are fairly consistent across each region, though respondents in Western Europe were particularly likely to expect more than 50 hours per week, and those in Latin America least likely to expect a working week in excess of 50 hours.

There's little change here compared to 2009, for which the overall picture of expected working hours is almost identical. The main change is an increase in the overall percentage of respondents expecting to work 50-60 hours per week (27% in 2013, from 23% in 2009) and corresponding reduction in those expecting to work 40-50 hours per week (44% in 2013, from 50% in 2009). Interestingly, there's little correlation between working hours expectations and target salaries; overall, respondents aiming at the highest salaries were no more likely to select the highest working hours range than those with the lowest salary expectations.

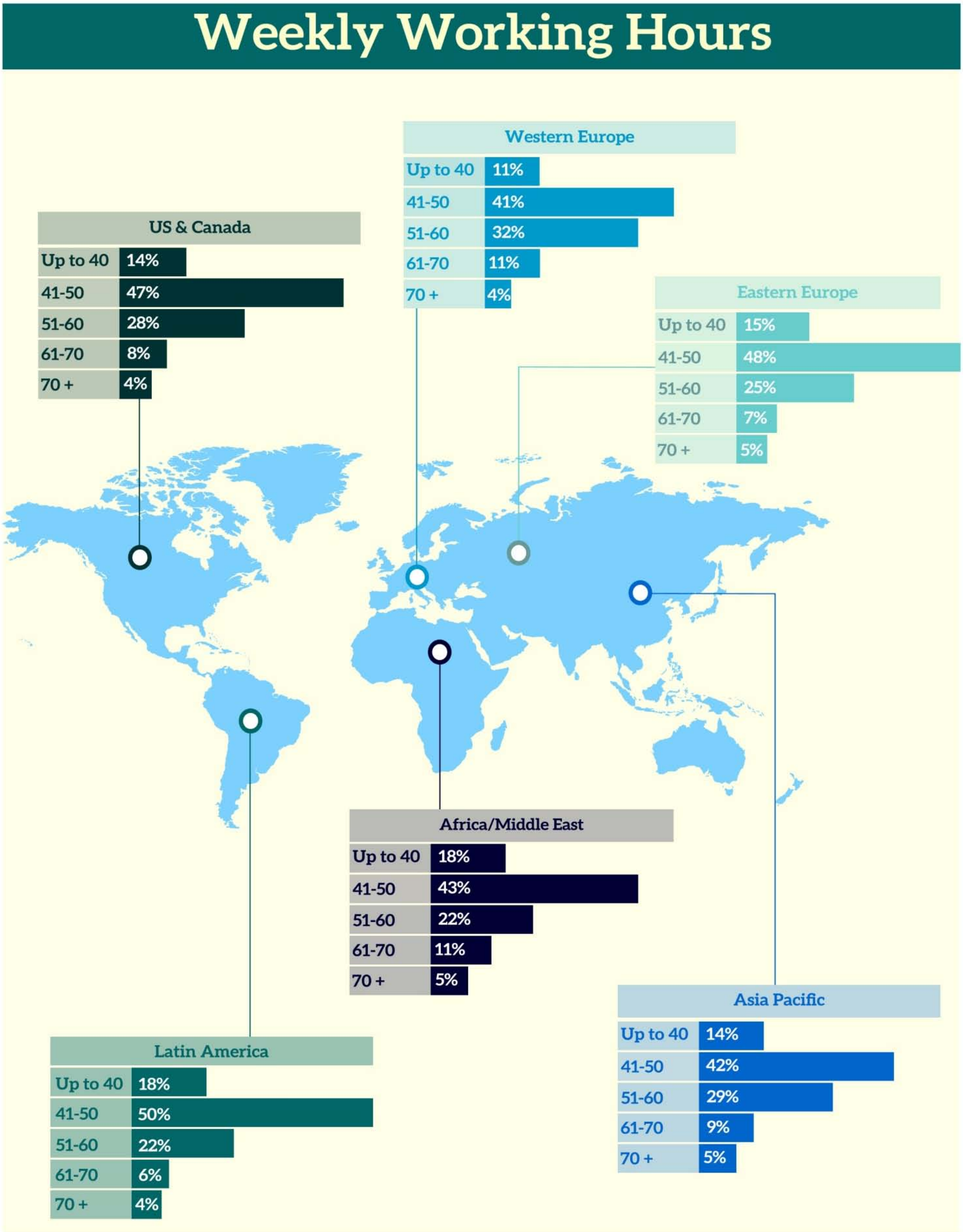

Image 8: How many hours per week do you expect to work in your first job after your graduate qualification?

Conclusions and implications

The data collected for this report provides further confirmation of the rapidly accelerating competitiveness of the international student recruitment market. The changing preferences of survey respondents over the period reflects the already observed decline in the overall market share of the leading Anglophone destinations, and the rise in popularity of a much broader selection of destinations – with well-established study destination Germany enjoying a surge in popularity, and emerging hubs such as the United Arab Emirates gaining prominence both within their own world region and globally.

Underlying these changing and diversifying study destination preferences are gradual shifts in the priorities of our surveyed international graduate school applicants. While international recognition of qualifications remains by far the most important consideration for them when choosing a study destination, this appears to be slightly declining in importance – as it also becomes more widespread. With a much wider range of internationally recognized study destinations to choose between, students are focusing more on other factors, notably study costs, financial aid availability and career prospects (both in terms of immediate employment opportunities, and general employability prospects).

Our survey responses also indicate that those applying for graduate-level study have high expectations about the career development and salary increase their degree will help them achieve, as well as being prepared to put in long working hours immediately on completion of their degree.

Accompanying qualitative research, conducted through one-on-one interviews with QS World Grad School Tour attendees, corroborates the assumption that applicants prioritize information about fees and financial aid, alongside information about course structure and content, and international application requirements and processes. During these interviews it became clear that for many applicants, finding the information they needed to make their decisions and submit applications was not always easy. And despite the vast range of online information available, online resources were often perceived as unclear, confusing, incomplete or unreliable. Many applicants stressed the importance of making top-priority information easier to find, and spoke about the usefulness of combining online and offline sources of information – with the latter including recommendations from personal contacts, as well as opportunities to speak to university staff and alumni.

These findings suggest that the most effective recruitment messages will include:

- Reference to the internationally recognized status of both the institution and the wider study destination – but with awareness that this is a prerequisite, rather than a USP;
- Clear information about study costs and financial aid availability;
- Information about post-graduation employment prospects in the study destination, including general job availability as well as information on employment rights and visas for international graduates;
- Reference to the program/department's success in helping students achieve their career goals, if possible including supporting information such as employment rates, salary levels, employers, job titles and career networking opportunities;
- Opportunities to communicate with university staff and alumni directly – by email, phone or face-to-face.

About QS

Founded in 1990, QS Quacquarelli Symonds is a leading global provider of higher education and graduate careers information and resources. The company is headquartered in London, UK, with major offices in Paris, Stuttgart, Singapore and Portland, as well as satellite offices in Beijing, Sydney, Boston and Washington DC. QS's products and services include:

Events

Hosting higher education recruitment fairs in almost 50 countries worldwide, QS's main events series are the QS World MBA Tour, QS World Grad School Tour and QS World University Tour, alongside B2B and B2C conferences such as QS Women in Leadership, QS-APPLE, QS-MAPLE and QS WorldClass.

Websites

QS's main online platforms are TopUniversities.com and TopMBA.com, the first a comprehensive resource for prospective and current international students, and the second providing specialized resources in the MBA sector. Both websites have large and growing international audiences, reaching a combined total of just under 85 million pageviews in 2013.

University rankings

In 2013, QS became the first compiler of global and regional university rankings to receive the "IREG Approved" label from the International Ranking Expert Group (IREG) Executive Committee. The company's flagship QS World University Rankings® is accompanied by the QS World University Rankings by Subject, QS Top 50 Under 50, a selection of regional rankings and specialized MBA rankings including the QS Global 200 and Distance/Online MBA Rankings.

Publications

As well as student-focused publications such as the QS Top Grad School Guide, QS Top Universities Guide, QS Top MBA Career Guide and QS Top Executive Guide, QS also publishes annual market research reports such as the Top MBA Jobs & Salary Trends Report, Top MBA Applicant Survey and the current report, which is based on the World Grad School Tour Applicant Survey.

Software

QS unisolution offers a portfolio of software and services for the international higher education sector, including solutions for international recruitment, applications and admissions management.

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