

May 2020

International Student Plans

The Impact of COVID-19



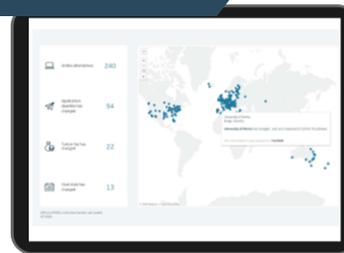
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Our mission is to make the world understand the power of learning, and we do this by making education choices transparent and accessible to students worldwide. With our platforms, we enable students to search for programmes and connect with the right universities.

We are dreamers, doers, and former international students ourselves, who have come together from 29 countries, determined to make one dream happen:

Empower the world to choose education

Studyportals ACT team

The Analytics and Consulting Team (ACT) at Studyportals advises and assists universities and other organisations in the higher education sector to realise their ambitions in the field of international marketing and international student recruitment.

Our team of consultants covers everything from strategy, branding and marketing to customer relationship management, student recruitment, market insight, competitor analysis, web analytics, training as well as custom services. Our three areas of expertise are Analytics & Market Intelligence, Consulting, Tracking and Recruitment Funnel Optimisation.

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Foreword

To this day, the coronavirus has infected more than 4.3 million people in at least 213 countries and territories globally. Universities worldwide have been forced to shut their campuses and reshape their institutions. The transition to online education, the delay of commencements at universities, cancelled exams and early holidays are only a few examples of actions that universities have taken so far.

In the midst of the crisis, we made it our business to take a look at the new context that the pandemic has created for prospective international students in higher education. We investigated, inter alia, the following questions:

- What are students saying about the corona outbreak?
- What are students planning to do?
- What can universities do to reassure students?

On 20 March 2020, Studyportals started a survey among prospective international students in order to find out how they are perceiving the impact of COVID-19 in relation to their study plans and intentions to study abroad. To date the total number of responses gathered was 991 out of which 817 were complete.

To better capture the mood of international students and their concerns, Studyportals also engaged with its audience of prospective students on [social media](#). The results of those interactions are reported to enrich the quantitative results from the survey.

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Executive Summary

Between 20 March and 10 April 2020, Studyportals conducted an online survey among prospective international students in order to find out how they are perceiving the impact of COVID-19 in relation to their study plans and intentions to study abroad. To better capture the mood of international students and their concerns, Studyportals also engaged with its audience of prospective students on [social media](#).

As the COVID-19 pandemic develops, students are increasingly considering to change their study plans. Where the survey showed that overall 36% of students are considering changing their study plans, this percentage increased from 31% after week 1 to 40% after week 4. The students' main concerns are that their travel plans may be restricted (85%), that their (parents') savings may decrease (61%-68%) and 50% are worried about not being able to finish their exams in time. Of the 36% that indicated to change their study plans, 50% say they will postpone their enrolment to next year, 42% are considering to enrol to an online programme, 21% are considering not going abroad but to enrol into a domestic university and 11% not to study at all. Overall, higher education institutions stand to lose a maximum of 32% who are considering not to study abroad and/or not to study at all.

Without a shadow of a doubt (96%) students indicated that better hygiene on campus was important to them, followed by online counselling (89%), a 24/7 helpline (86%) and the extension of the application deadline (86%).

When looking at the various destination countries they are considering, there were no significant differences between students considering studying in the United States, the United Kingdom, Canada, Australia or the Netherlands, with 35-39% of them saying they were considering changing their plans. Only Germany stands out, as fewer students considering Germany also mentioned they are changing their plans (28%).

Part One

Survey respondents

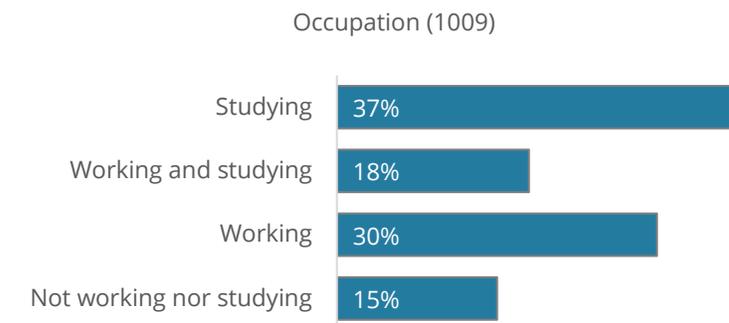
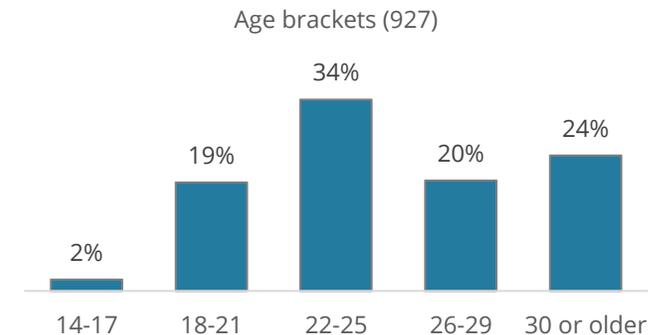
Who took part in the survey?

Until 15 April 2020, 817 respondents submitted the complete survey. Including partial responses, the total number of respondents stands at 991. The respondents match with the profile of young individuals active in higher education and actively looking for study options, mostly abroad and delivered on-campus.

Respondents are generally students (37%), working students (18%) or workers (30%) who are looking at furthering their education. Most of the survey respondents are actively searching for a programme (82%), across different stages of the study search funnel.

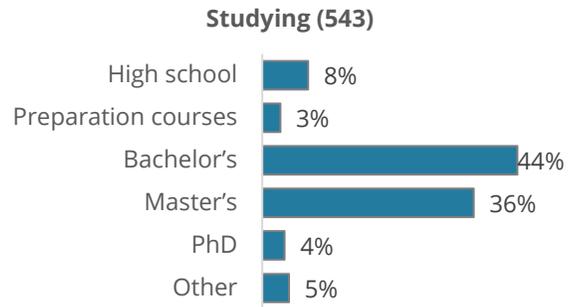
The ones that are currently in education are mainly studying their Bachelor's (44%) or Master's (36%) degrees. While most of them are studying in their home countries, a sizeable share is studying abroad already (30%).

Their interests and age groups reflect their current education level. Respondents are looking mostly at postgraduate education: 60% look for Master's programmes, 20% for Bachelor's programmes, and 14% for PhDs. They are generally within education age: 20% of the respondents fall within the bracket 18 to 21 years old, 34% within 22-25. Unsurprisingly, a sizeable share of students looking for options abroad are more mature learners: 20% is between 26 and 29, and a large 24% of them are over 30 years old.

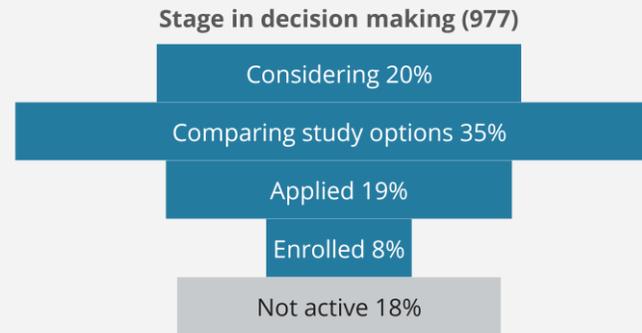




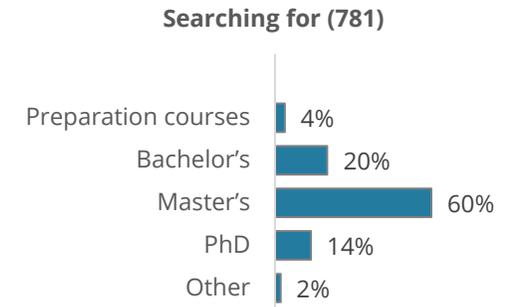
What are they studying?



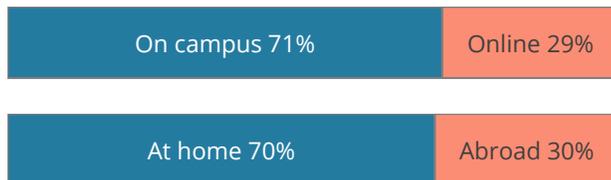
When are they planning to enrol?



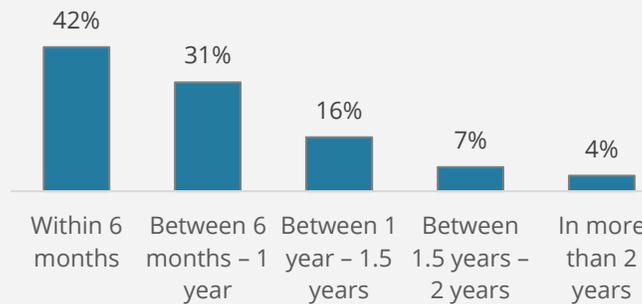
What would they like to study?



Studying (537)



Planned start (782)



Searching for (731)



Who took part in the survey?

The main countries of origin of the respondents are Nigeria (11.3%), India (10.7%), Pakistan (6.4%), Kenya (4.1%), Ghana (3.8%), Germany (3.3%) and Bangladesh (2.8%).

These countries are largely overlapping with the areas where there is a large, young, and active population, most of which in study age.

Most of the respondents are studying on-campus (71%), albeit a sizeable minority is already involved in online education.

The most popular countries of destination that students are interested in are Canada, the United Kingdom, USA, Germany and Australia.

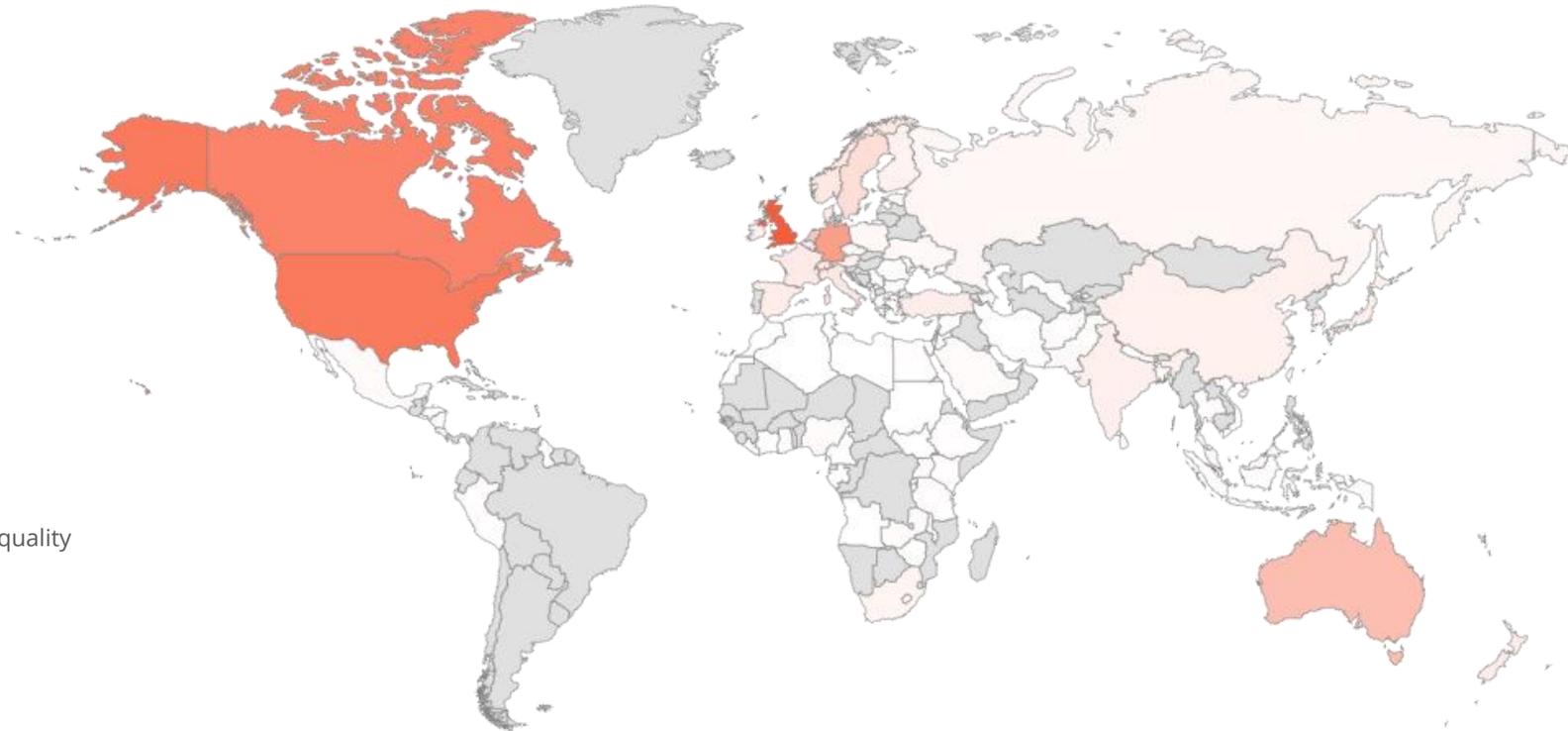
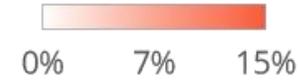
More importantly, most of them are looking at other on-campus options for furthering their education (83%).

The model respondent is:

- A person in her mid 20s already studying at a university;
- Coming from large, populous countries with limited access to high-quality English-taught education;
- Comparing study experiences for the upcoming year;
- Looking for on-campus, post-graduate programmes.

Countries named as preferred destination

Average preference



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Part Two

Main Findings

Will COVID-19 affect students plans?

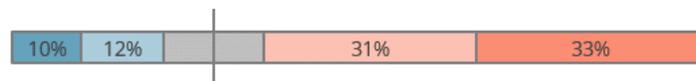
The perception of COVID-19 among survey respondents

We asked prospective international students how likely it was for the COVID-19 outbreak to affect their study plans. Overall, the majority of the respondents thinks that the virus outbreak is likely (31%) and very likely (33%) to affect their studies. A small share of them (14%) is still undecided whether this event will reflect upon their studies.

Studyportals had the opportunity to investigate the issue removing the different degrees of certainty from the question, reaching out to prospective students on social media. In such case the share of students that voice their concerns rises.

How likely it is that the virus outbreak will affect your studies?
(all students, n=853)

■ Very unlikely ■ Unlikely ■ Undecided ■ Likely ■ Very likely

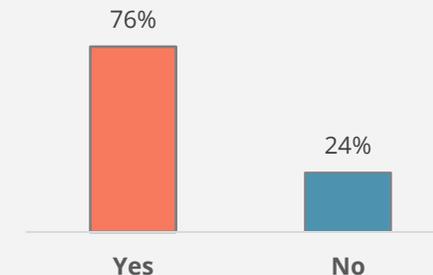


Student perceptions on social media

As previously mentioned, Studyportals also engages with its audience of prospective students on social media. During these times it is even more important to keep the community together and listen to each other's concerns. In March 2020, Studyportals posted a short poll, within the time frame of 24 hours, on Instagram, asking students about the COVID-19 outbreak.

Though smaller in sample size and different in phrasing the question and responses, the Instagram poll led to similar results as those obtained by the survey. More than three quarters of (prospective) students think that they will be affected by the virus outbreak in 2020. Leaving no middle ground for undecided respondents, the likelihood of study plans to be affected rises.

Will the COVID-19 outbreak affect your study plans in 2020? (n=223)



How will COVID-19 affect student plans?

"[I] can't go to [university]. My entire thesis plan, [graduation] trip and the rest of my semester schedule has been greatly affected by [the COVID-19 outbreak]" – this was only one of many embittered student voices.

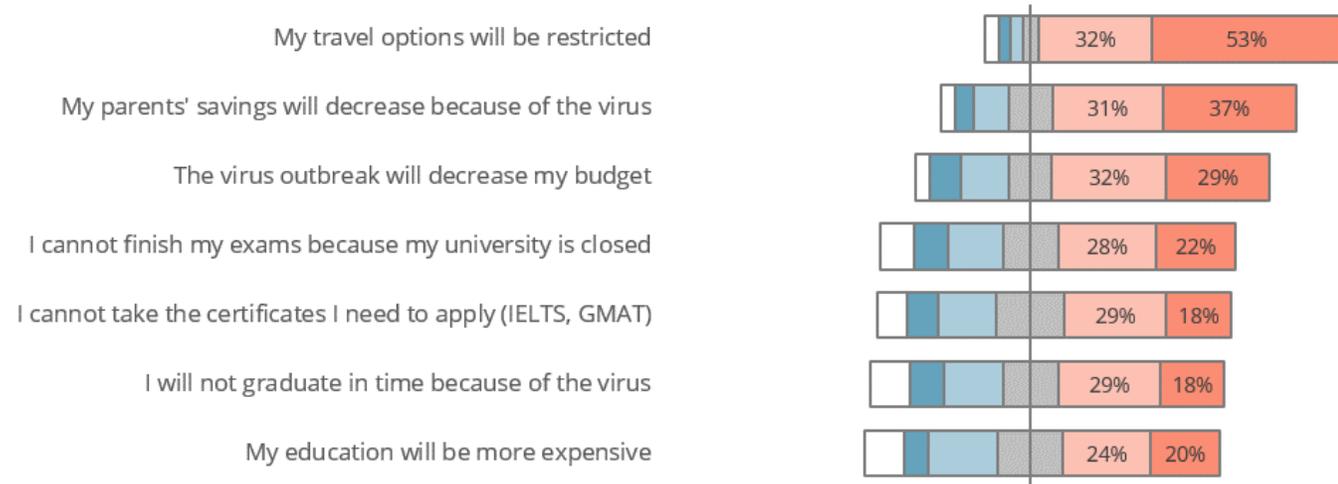
While the long-run effects of the pandemic are still to be decided, students' opinion is almost one-sided.

Furthermore, Studyportals asked the students to what extent they agree or disagree to certain statements. The main worries students seem to have are related to travel restrictions (85%) and to financial issues: a decrease of their (parents') available budget (68%) or their own budget (61%).

These two elements are the main concerns of internationally mobile students: mobility and money. Also before the current pandemic the main issues were about how to get study visa – or for more mature learners post-study work visa – and about how to finance their studies. Apparently, the virus exacerbated these concerns more than affecting programme delivery or graduation dates.

As a result of the virus outbreak, many things may change. Please rate how much you agree or disagree with the following statements.
(all students, n=845)

□ I don't know ■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree



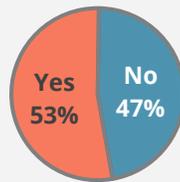
What can universities do?

In the Instagram poll, we came to an interesting result when asking about the (prospective) students' opinions on their (future) universities' measures. The opinions are evenly split: 47% of all respondents do not feel sufficiently informed on the measures taken by universities. This clearly shows that higher education institutions should invest more time and effort in informing their (prospective) students.

Ask Instagram:

"Is your (future) university informing you sufficiently on the measures taken?"

n=177

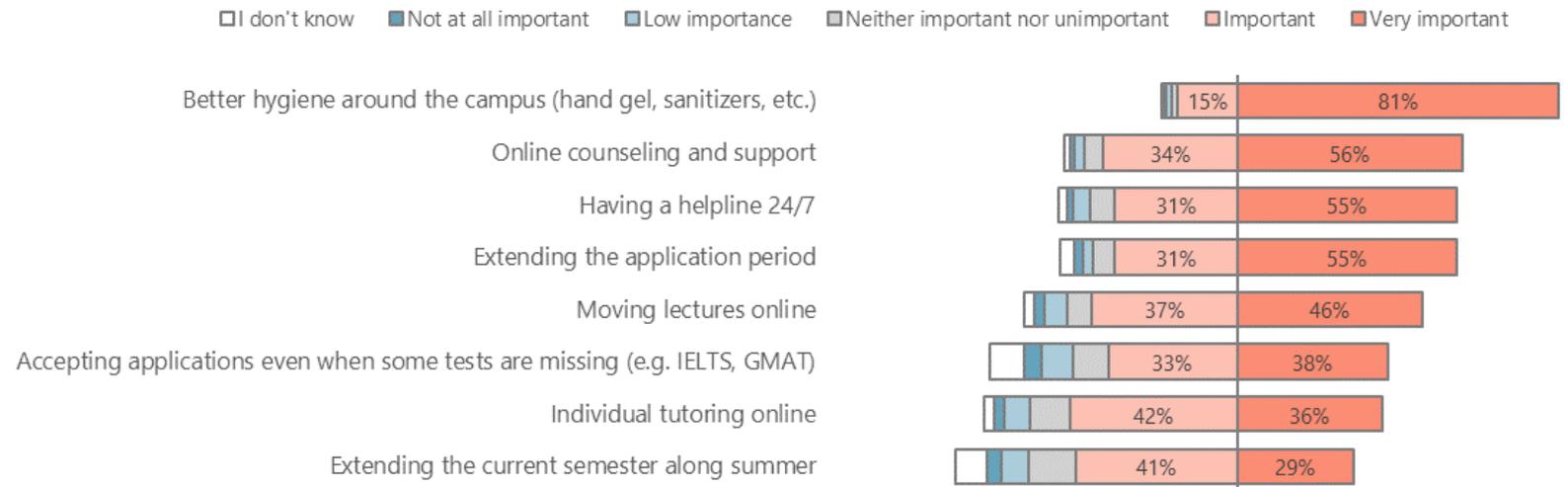


Despite the best efforts from the universities, students and prospective students find it hard to retrieve structured, fast access, and reliable information. Studyportals is helping universities to connect with prospective students by showing how higher education is changing.

This directly leads us to one vital question asked in the student survey. When asked about how important following mentioned measures were in a university, the vast majority considered "better hygiene around the campus" as the most important measure (15% important, 81% very important). Moreover, many respondents think that having a 24/7 helpline is important as well.

Nevertheless, one could say that all options below are to some extent crucial for the students; hence, universities should make effort to inform the students sufficiently not only about the hygiene around campus and helpline but also about the application processes and deadlines, measures regarding online education and the universities' status quos.

How important are the following measures in a university? (all students, n=830)



What changes are students considering?

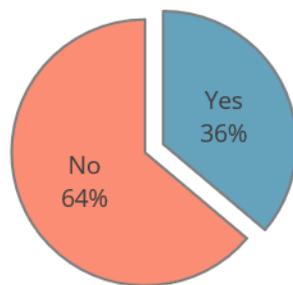
When asked whether the respondents changed their study plans due to COVID-19's outbreak, the majority (64%) responded "No". However, students who responded "Yes" were asked a further question: "What changes would you take into consideration?". In terms of the options students are considering the most, postponing their enrolments has become the most popular option mentioned by half of the students who are changing plans, with the second most

popular option being enrolling in an online course or degree.

For 15% of the students changing their options, no longer going abroad is also on their mind, with smaller numbers (12%) considering just changing their destination country, and 11% considering skipping studying all together for the time being. Though only 36% of all respondents changed

their study plans due to the virus outbreak, the changes they are considering are quite on the radical side. By postponing their enrolment or deciding not to study at all, students will heavily affect the Higher Education industry. On the other side, Erasmus exchange students are forced to cancel their plans. "[The exchange year] can't be [compensated] because it was [my] last chance [to] study abroad", said one of the students.

Did you change your study plans due to the virus outbreak? (all students, n=849)

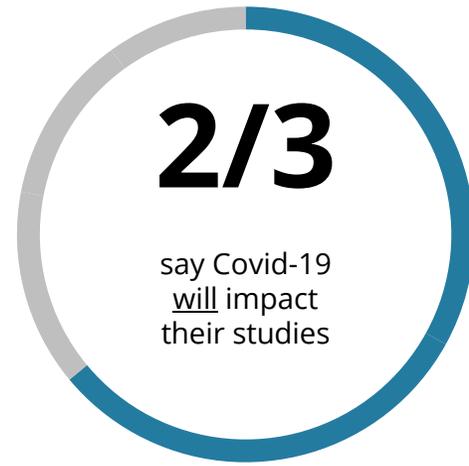


What changes would you take into consideration? (Multiple checkbox) (n=307)



Main findings

The main finding is that students think that COVID-19 will affect their studies, but they are also trying to carry on with their plans. “[The] only information I want [to know] is how to finish my last college course even if I have ... to return home”, a student responded in the survey. Nevertheless, students are willing to commit to studying abroad despite the obstacles they might find, albeit a growing share of them is changing plans.



Two-thirds of prospective students think their studies are going to be affected by the virus outbreak. The real question, however, is whether they are already taking measures to cope with the crisis, and even more importantly, which measures are they considering.



Interestingly, only one-third took action to change their study plans, while approximately two-thirds are trying to carry on with their plans. However, the share of students taking active measures to offset the effect of COVID-19 has been growing during the weeks from 31% (20 March) to 40% (1 April).

Part Three

Understanding student segments

Are all students the same?

In a nutshell: yes and no. Though the overall responses seem to give a similar picture, we can clearly see how certain factors impact students on their decisions.

Now that we have looked at the surveyed students as a whole group, we will continue by looking at specific groups. Starting with comparing students who are studying abroad with their domestic counterparts. These two groups differ with respect to their outlook on study plans. Based on our survey, students studying abroad are more determined in changing their plans; it seems as if this particular group is more aware (and more pessimistic) of the possible proportions of COVID-19.

There was also a further, fatal factor: the intended start date of studies. Students who planned to start their studies within the next six months are more aware that the virus outbreak will affect their studies than students who will start after that. Nevertheless, the responses of students who will start studying later seem to be more radical since far more students (47%) would postpone their enrolment to the next year or after. On the other hand, only 26% of students who plan to start studying within the next six months consider that option. With that knowledge, it might be advantageous for higher education institutions to target prospective students accordingly.

Lastly, we compared the responses of bachelor's and master's students. Though most of the responses lead to similar results, there was an interesting finding: there are more bachelor's students (19%, master's students: 11%) who considered not studying abroad and enrolling in a university in their home countries. One explanation for this could be the fact that it would provide more security for them.



Time is of the essence!

What emerged from the survey analysis is that **students planning to start studying in the next 6 months** (that are planning to commence in the next semester) have different concerns and pain points than **students who have a more relaxed time frame**

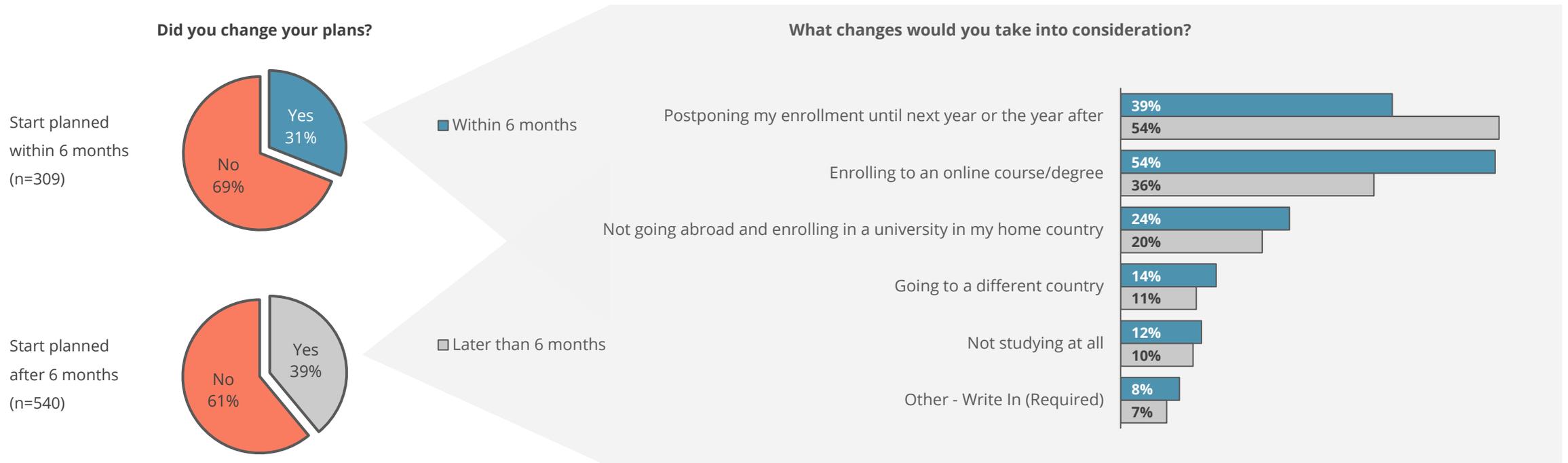
Students planning to start within 6 months

It appears that the concerns for potential disruption is shared by students worldwide. However, students closer to their deadline are somewhat more aware that the current situation will affect their studies (65% likely and very likely vs. 59%). Around two-thirds of prospective students planning to study in the next six months (42% of the respondents) think their studies are going to be affected by the virus outbreak.

The real question, however, is whether they are already taking measures to cope with the crisis, and even more importantly, which measures are they considering. The closer students are to their planned start date, the more likely they are to stick to their plans: “only” 31% changed their study plans, compared to 39% of students with a more relaxed timeline.

For students who plan to start within 6 months, online learning is the most considered alternative (more than half of these students mentioned it).

Prospective students who will start studying later decided to put their studies on hold. This is eventually an opportunity for institutions that can reach out to them.





Destination anywhere

International students are roughly one-third of the survey respondents. **Students abroad** are more likely to change their plans. They are less likely to postpone their studies, and more likely to embrace online courses

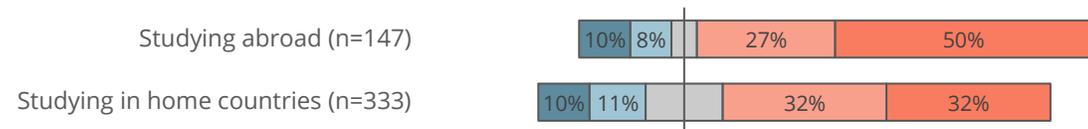
Furthermore, respondents who are studying abroad are more likely to have already adjusted their plans for the emergency. More specifically, a larger share – 40% against 34% of students studying in their home countries – changed their study plans due to the virus outbreak.

Of this group, most (50%) are considering enrolling in online courses or degrees, while other options are not so popular. Students studying in their home countries, on the other hand, are also considering postponing their studies, or simply not going abroad at all, sending a worrying sign to international student mobility.

It is important to point out that respondents who modified their study plans are still a minority of the whole group. Student perceptions are changing as the virus spreads.

How likely it is that the virus outbreak will affect your studies?

■ Very unlikely ■ Unlikely ■ Undecided ■ Likely ■ Very likely



When it comes to perceptions these two groups are highly divided. Students studying abroad are way more decided in their response to the virus, and way more pessimistic: 77% are more likely than not to be affected by the virus outbreak, against 64% of students studying in their home countries.

Students already studying abroad

Respondents studying abroad are more likely to take action in order to offset the effects of the pandemic (40% against 34% of students studying in their home countries). The actions they plan are different from the ones of the other group.

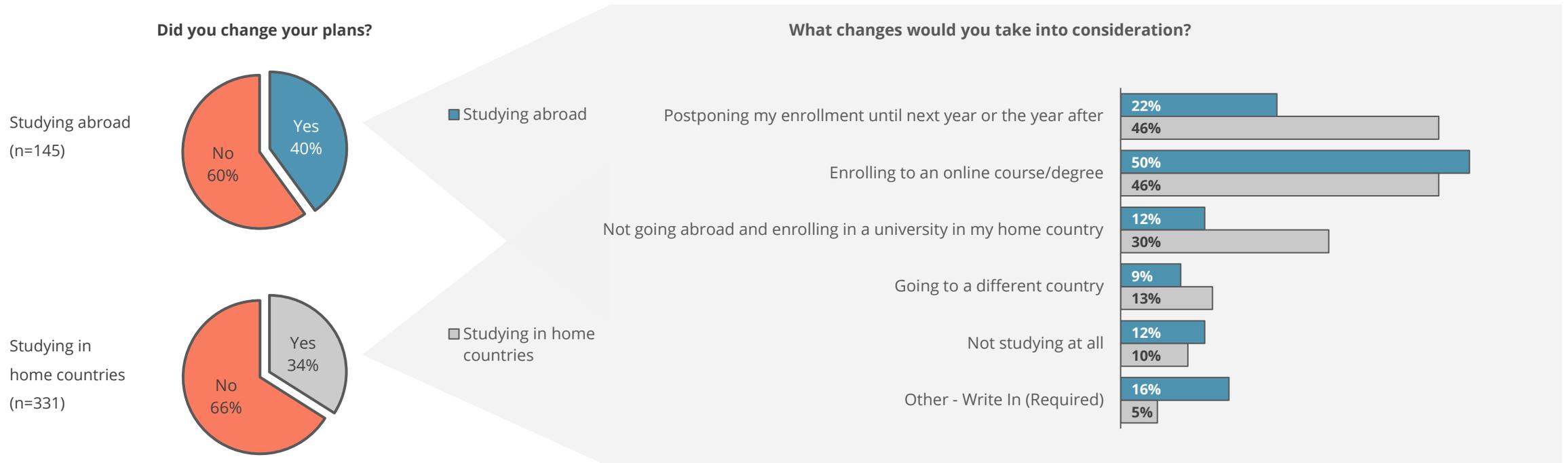
Students already abroad are less likely to consider postponing their enrolment and are less likely to consider studying in their home countries.

Their domestic counterparts are instead considering a wider range of options, generally casting more than one option, considering – in order of importance – delaying the enrolment, studying online, and not going abroad.

What students studying abroad expect from universities are:

- Moving lectures online;
- and offering a 24/7 contact line.

The other measures are less important than for the other group of domestic students. In particular, for students already studying abroad certain priorities dropped: extending the application period (the share deeming it very important goes from 58% to 49%) and accepting applications with missing test (40% to 27%).



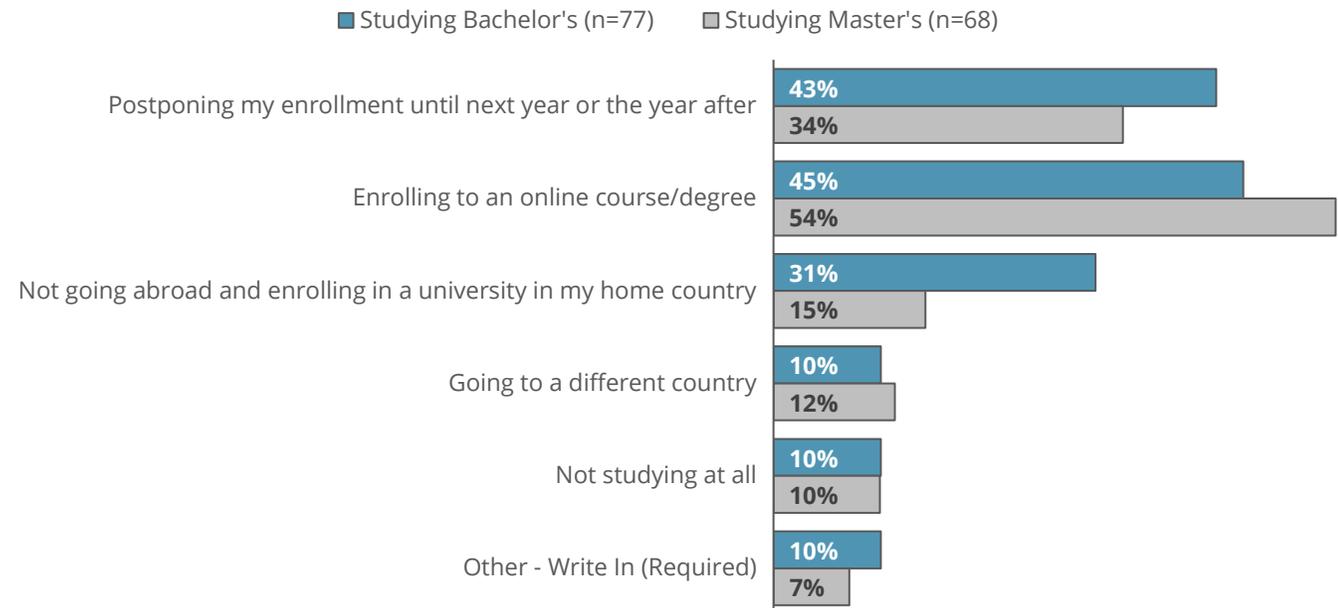


Level of education

Student groups differ by their study level. **Bachelor's and Master's students** have different opinions on how to offset the worst effects of the pandemic

Since the majority of the respondents are in search of a postgraduate programme (60%) and 20% are looking for an undergraduate programme, we decided to take a look at whether the survey results vary between these two groups. Although most questions result in similar responses, there was an interesting finding. Interestingly enough, there is a much higher percentage of undergraduate degree-seeking students choosing “not going abroad and enrolling in a university in my home country” (31%) than postgraduate degree seeking students (15%). The reason why more undergraduates seeking students are choosing that option might be because they are younger and less mature, it is their first study experience and that they are more likely to be financially dependent on their parents. With the current situation studying abroad would presumably not meet their expectations; hence, enrolling in a university in their home country would provide more security for them. Meanwhile postgraduates already had their first study experiences and have financial means.

What changes would you take into consideration?



Destination impact

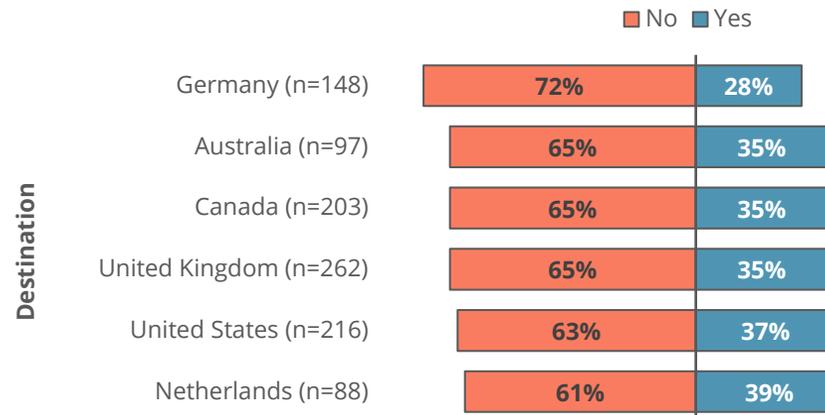


Location, location, location

Not all countries of destination are the same. **Study destinations** differ by strengths, study proposition, and perceptions of the COVID-19 emergency

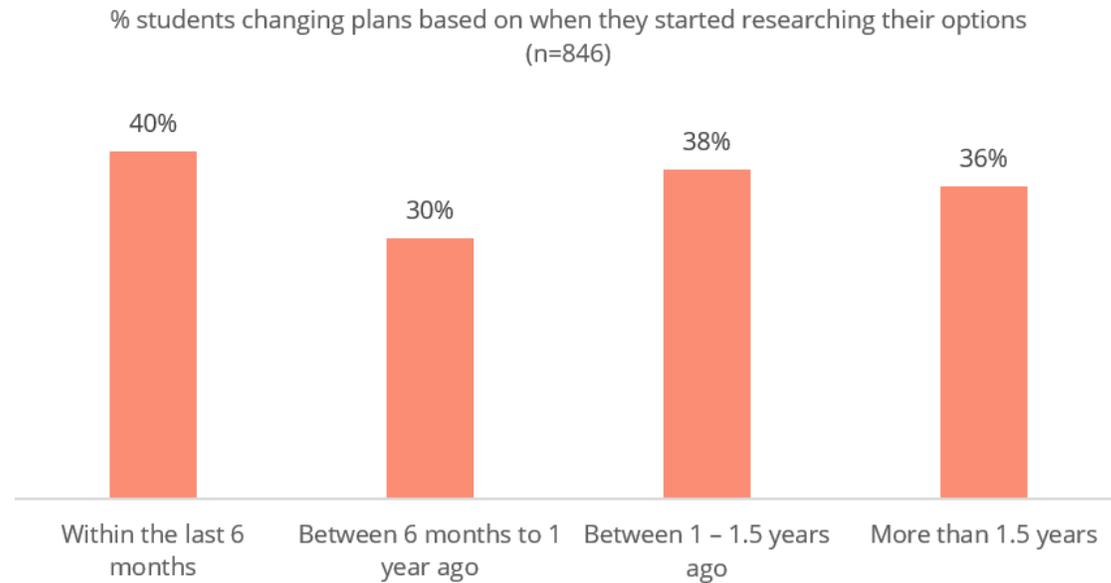
Are all destinations impacted equally by students changing their study plans? This depends. When looking at the top destinations they are considering, there were no significant differences between students considering studying in the United States, the United Kingdom, Canada, Australia or the Netherlands, with 35-39% of them saying they were considering changing their plans. Only Germany stands out, as fewer students considering Germany also mention they are changing their plans (28%). One hypothesis is that so far Germany has been portrayed as a success story in the fight against COVID-19, reporting fewer deaths and therefore maybe looking like a safer study destination now.

Did you change your plans due to the virus outbreak?



Does it matter how long you have been considering options?

One last hypothesis we wanted to test is that students would be less inclined to change their study options if it is something that they have been researching for a longer time. While we do notice some differences between students who have just started their study choice process saying that they are changing their plans, the same is also true for those already researching their options for over 1 year, though less for students who have started between 6 months and a year ago.

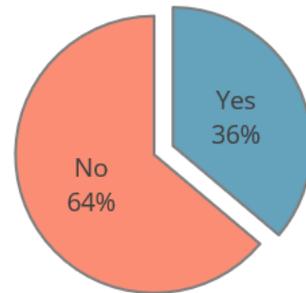


Changing minds

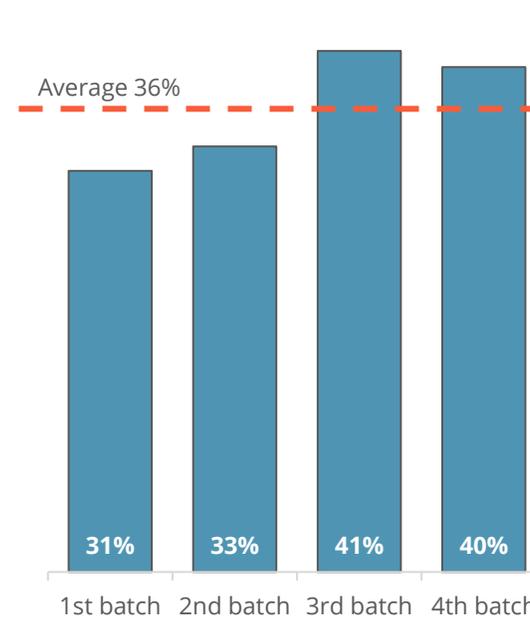
Overall, 36% of students are saying that they are changing their study plans due to the virus outbreak. When breaking down the respondents based on the dates on which they completed the survey, we can see some differences between the different response batches.

31% of the first respondents in March had mentioned a change of plans, and that number steadily grew to 40% by the first week of April.

Did you change your study plans due to the virus outbreak? (all students, n=849)



% of students changing plans (all students, n=849)



Part Four

What can universities do?

Understanding your students

What students in their home countries and students abroad like to have from universities are two resources that are often overlooked: *time* and *flexibility*. This is related specifically to extending the application deadlines, but they would also welcome processing applications even when certificates are missing. This may seem a general plea from applicants but at a time where language test centres are closed, showing extra flexibility can pay dividends in the future. Higher education institutions seem amenable to these pleas, but universities are well-advised to manage expectations as visa procedures may not be flexible enough, resulting in students not getting their visas in time.

If a lot of your international students had experiences studying abroad, then you probably want to learn more about their plans. They probably will try not to miss the upcoming semester, even if studying online is not their first choice in normal conditions. Nevertheless, higher education is not under normal circumstances, and listening to students is key in planning for the future.

Students who are studying in their home countries can afford to delay their enrolments, whereas students already studying abroad are more conscious of the online alternatives in their studies. Students abroad seem to be more open to services online and distance learning and not considering moving back to home countries.

It appears that students who are already studying abroad are more interested in solutions such as moving lectures online, offering individual tutoring, and counselling and support. Student services online are extremely welcomed when you are far from home.

Perceptions and active actions

Regardless of your larger strategy, some short-term measures can be taken to cater to the needs of all students. While understanding the needs of your future students is, in general, a good practice, special attention should be given to students that are likely to start in 2020.

It is important to show that universities work having the students' best interest at heart. Small, concrete and visible changes are very welcomed: better hygiene around the campus, and keeping communications open appear very important in the mind of prospective students.

Students that are closer to their enrolment deadline ask for greater flexibility: the provisional acceptance of applications, or extraordinary flexibility in admission criteria may help them weather the worst of this crisis. Moreover, this cohort of students is less likely to dismiss their plans. Prospective students with more relaxed deadlines might rearrange their plans and consider alternatives to their study abroad plans, but only time will tell. These survey results are part of an ongoing investigation, and more insights are coming in the next weeks.

When asked what measures universities can take and are important, out of the whole sample, 84% indicated better hygiene as the most important measure, followed by a 24/7 helpline (57%), online counselling and support (56%) and extension of the application period (55%).

However, the two groups diverged on certain issues: for the prospective students planning to start in the upcoming six months, time is of the essence. The group rated as very important and important two main ways of bending the application rules:

1. Extending the application period.
2. Accepting applications even when some tests are missing (e.g. IELTS, GMAT).

Part Five

Methodology

Survey constraints

Out of 10,622 students that opened the email invitation to the survey, 1,248 clicked through to the survey between 20 March 2020 and 1 April 2020. The first batch was sent out on 20 March 2020, the second one on 24 March, the third one on 28 March and the fourth and final batch on 1 April 2020. The total number of responses gathered was 991, out of which 817 were complete.

Total responses	Complete responses	Partial responses	Response rate on total	Response rate on impressions*	Completion rate
991	817	174	0.72%	9.33%	82.44%

Recipient group	Date	Email delivered
Randomly selected group	20/03/2020	34,173
Randomly selected group	24/03/2020	34,173
Randomly selected group	28/03/2020	34,173
Randomly selected group	01/04/2020	34,173
Total		136,691

Partial data has been included in some answers. Not all respondents were presented with the whole range of questions (branching).

The purpose of the survey was to investigate how prospective international students are perceiving COVID-19 in relation to their study plans and their intentions to study abroad.

It is important to note that the survey sample is biased towards Studyportals' users. In addition to that, the survey has limitations since the sample size is rather small with 991 respondents. Moreover, the survey is limited to only providing insights of students who have access to the Internet; hence, there is incomplete information for offline students.

Additional surveys

Besides the student survey analyzed in this report, there was another survey administered via email over the period of a week, asking about the effects of COVID-19 on the study plans and what kind of information students would like to receive from higher education institutions. A total of 791 responses was gathered. Among these responses, many students expressed their concerns and feelings regarding the situation. The results were used to add quantitative results to the whitepaper.

To better capture the mood of international students and their concerns, Studyportals also engaged with its audience of prospective students on social media. The results of those interactions are reported to enrich the quantitative results from the survey. We asked a few questions regarding the COVID-19 outbreak on Instagram. This was done by using the 'story function' which allows us to share photos, videos, questions, etc. within a 24 hours time limit. At present, Studyportals has around 17.6 thousand followers on Instagram. On 24 March 2020, the below mentioned questions were asked on the platform:

1. Will the COVID-19 outbreak affect your study plans in 2020?
2. Is your (future) university informing you sufficiently on the measures taken?
3. What important measures should universities take in the upcoming months? (open question)

It is important to note that not only Studyportals' followers were able to respond to the questions but every user on Instagram. We received a total of 223 responses for the first question, 177 for the second while the last question resulted in a variety of answers, ranging from extending and postponing deadlines to providing proper online education to students.



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