

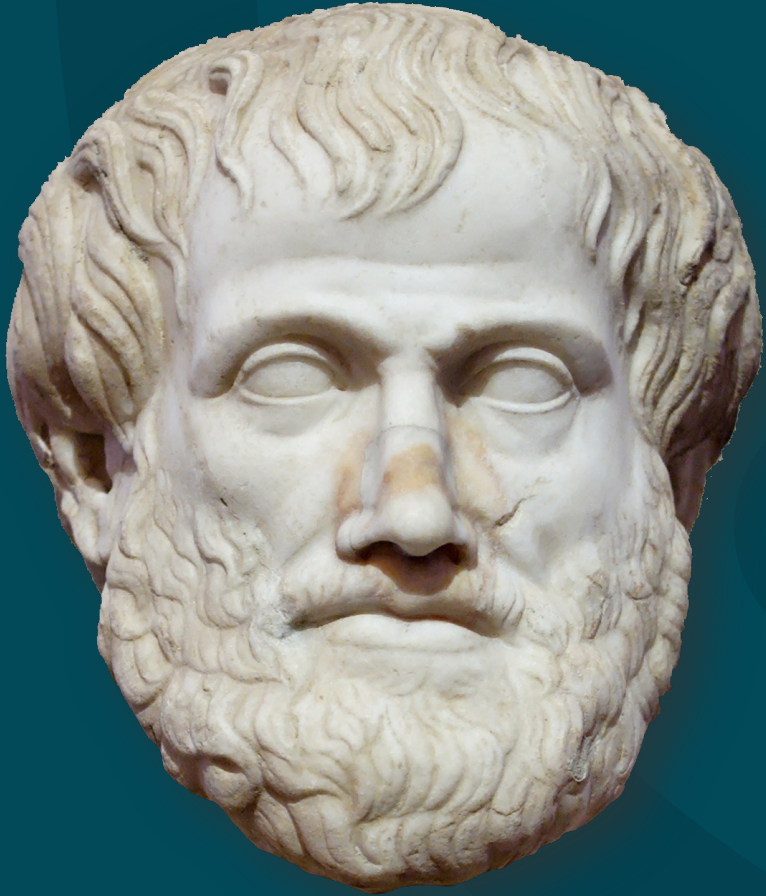
# Stay Ready for Gen Z

Exploring the world  
through their eyes

Tim O'Brien & Daniel Renton  
INTO University Partnerships  
[www.intoglobal.com](http://www.intoglobal.com)

AIEC Beyond Borders  
Australian International Education Conference  
18-21 October 2022


**INTO** »



“Generations are shaped by history, and then history is shaped by generations.”

Aristotle



- 
- ABOUT GEN Z – AND OUR RESEARCH
  - KEY FINDINGS
    - Outcomes are Top of Mind
    - Being There Matters
    - Gen Z is not Homogenous
  - HOW WE'VE RESPONDED

# GEN Z COMING OF AGE

## Gen Z

1996 – 2012

10 – 25  
Years Old



### Historical Events/Raised

Global Warming  
COVID-19  
Ukraine



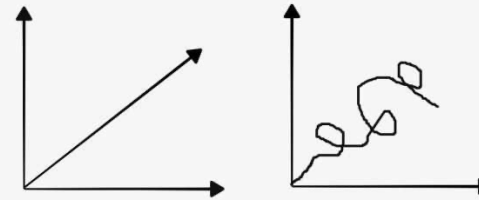
Over-parenting  
Social/Emotional Learning



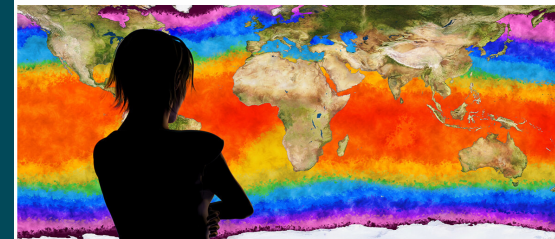
### Values

Inclusiveness  
Pragmatism  
Accountability  
Social Impact

Life

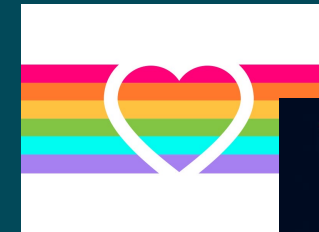


what I planned      what happened



### Slogan

Be Kind.





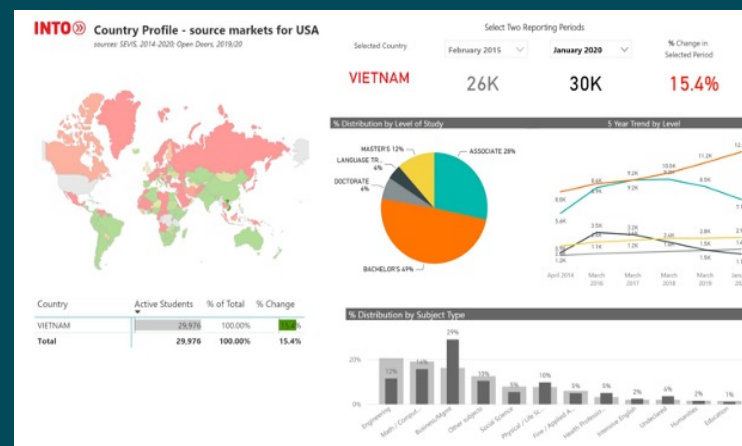
# INTO RESEARCH AND INSIGHT OVERVIEW

Longitudinal potential student surveys – across five countries



Deep dive surveys in key markets

World's most comprehensive agent survey



External data analysis



1. OUTCOMES ARE TOP OF MIND



# OUTCOMES MATTER TO ALL STUDENTS

## UNITED STATES

Why remain enrolled at college?



- 65% to obtain knowledge and skills
- 61% to pursue a more fulfilling career
- 60% to help achieve a higher paying job

Source: Gallup/Lumina Foundation

## INTO GLOBAL SAMPLE

Why study overseas?



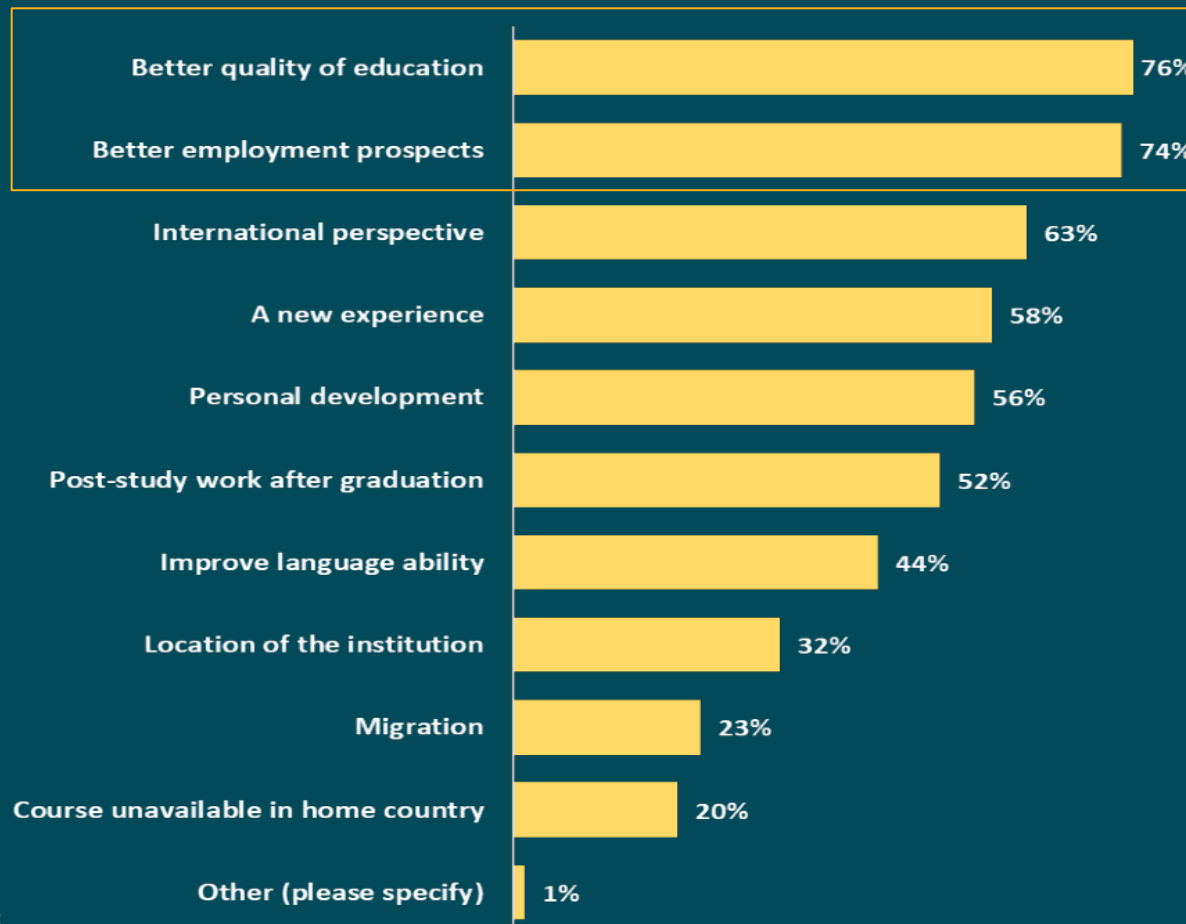
- 90% to obtain knowledge and skills
- 81% to get a better job
- 84% to get specific skills for a job

Source: INTO Global Gen Z Survey

# QUALITY OF EDUCATION AND EMPLOYMENT PROSPECTS REMAIN KEY DRIVERS OF STUDENT CHOICE

Biggest motivating factors for your students to study overseas?

Multiple answers allowed per respondent



But there are significant regional variations

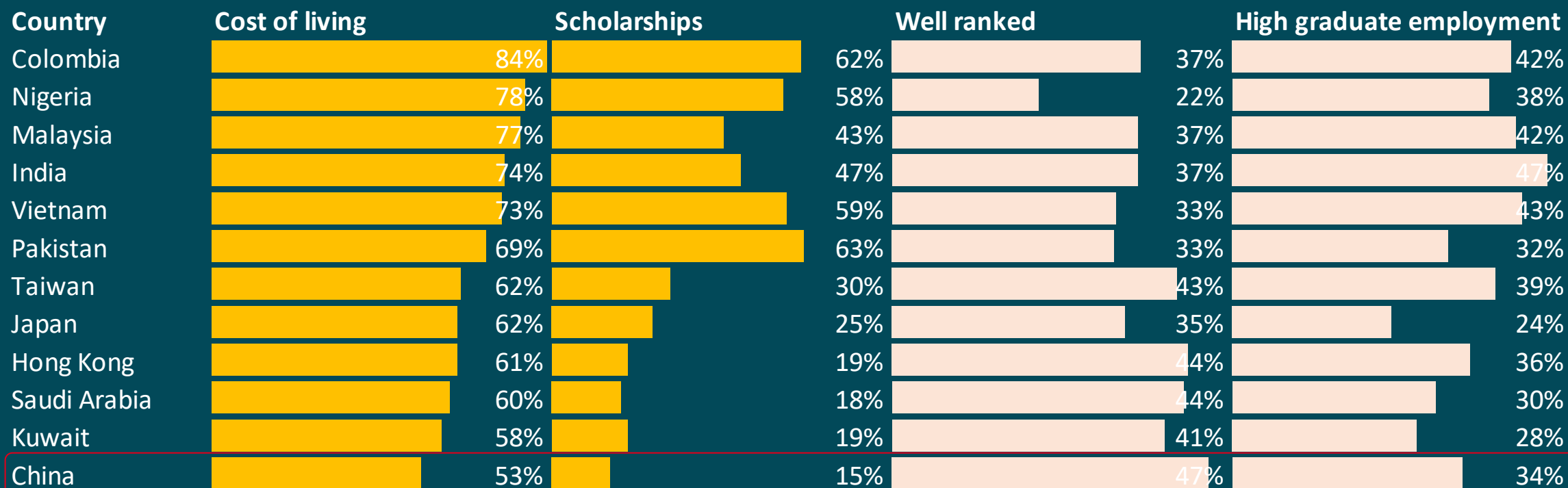


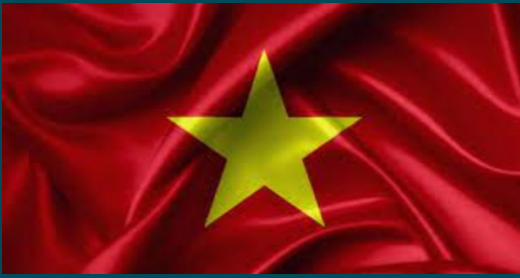
# GROWTH MARKETS HAVE DIFFERENT CHARACTERISTICS TO CHINA

Generally, more cost conscious

Often employability more important than ranking

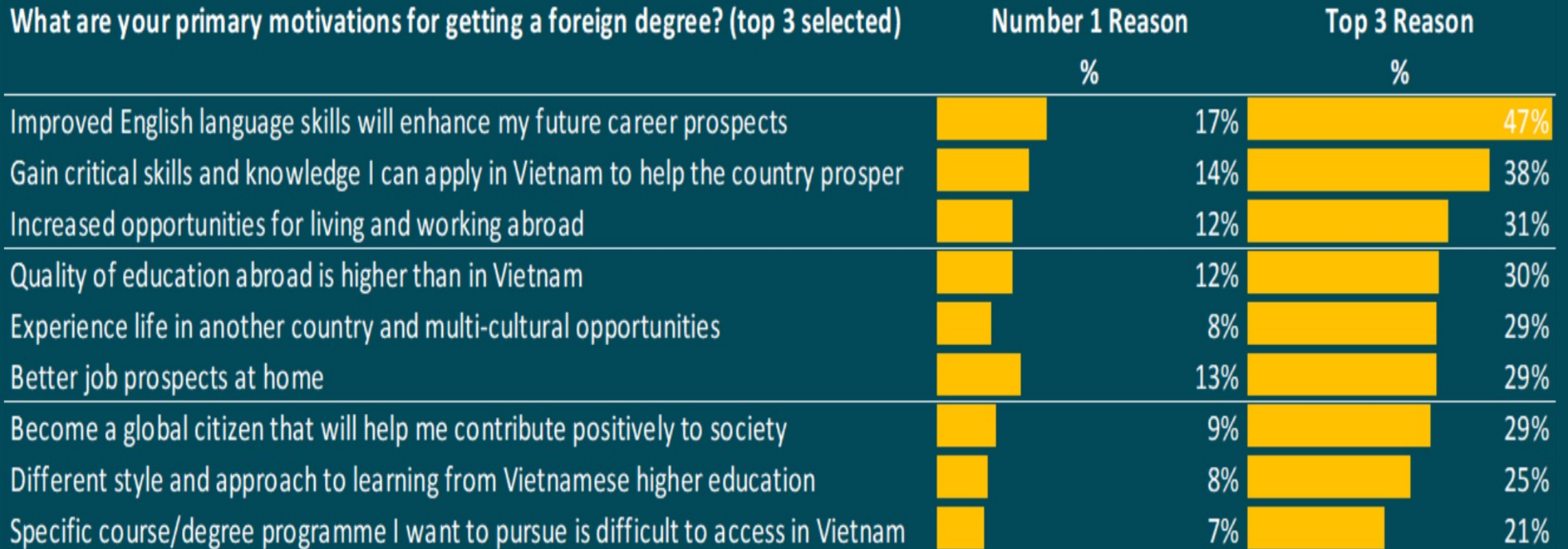
## Selected as a top factor when choosing a university





# VIETNAM: ENGLISH LANGUAGE AND CAREER OUTCOMES DRIVE CHOICE

What are your primary motivations for getting a foreign degree? (top 3 selected)





September 24<sup>th</sup> 2022

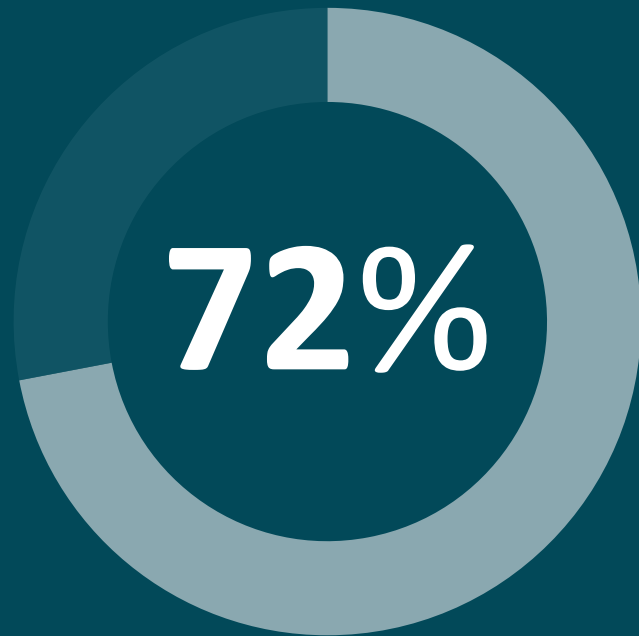
Asia | Chain reaction

# Vietnam is emerging as a winner from the era of deglobalisation

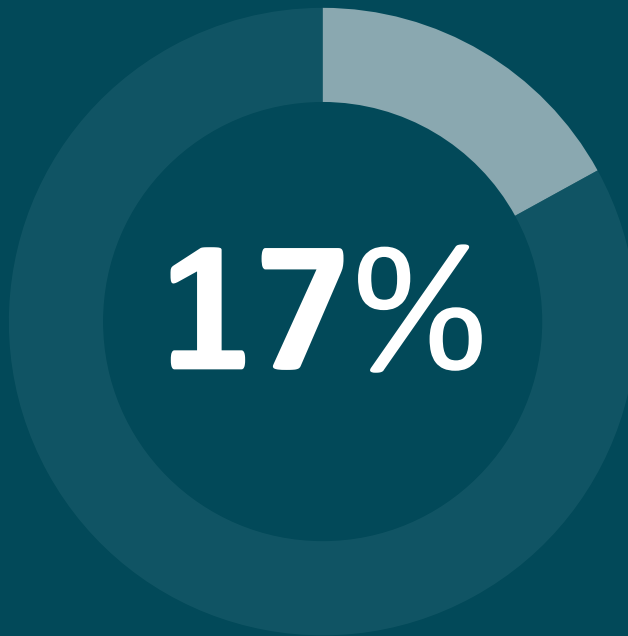
Yet achieving its goal of becoming a rich country by 2045 will still be a huge task

“Workers are plentiful in Vietnam but talented managers are rare. So are skilled technicians. Although Vietnam already punches well above its income level for schooling, its university and vocational training programmes need a boost”.

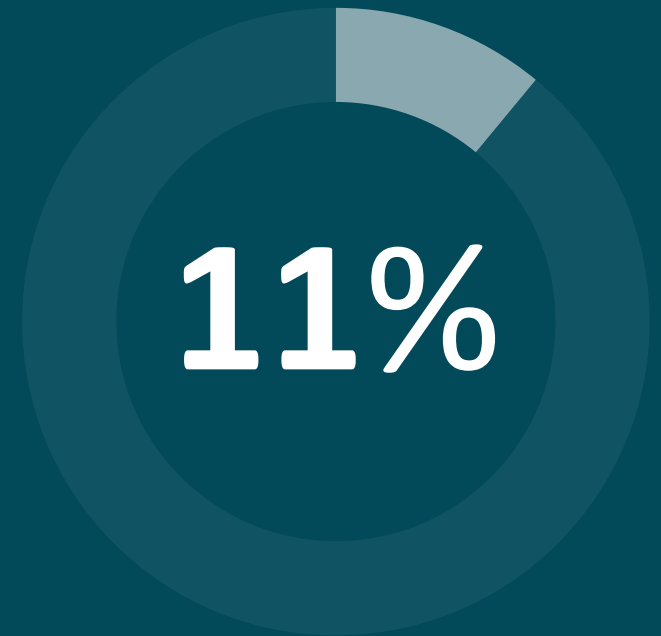
# HOW MUCH DO GEN Z INTERNATIONAL STUDENTS CARE ABOUT THE PRESTIGE OF A UNIVERSITY?



I want to study at a university that gives me the skills I need for my future; the ranking is far less important to me



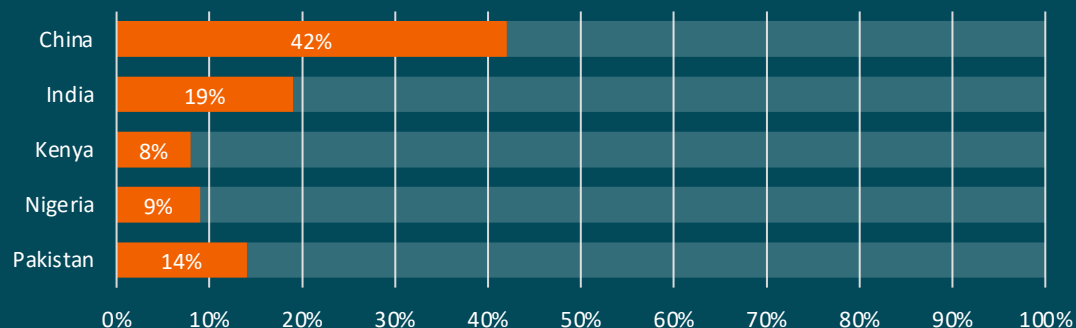
It's important to go to an elite, highly ranked university, even if it is more expensive



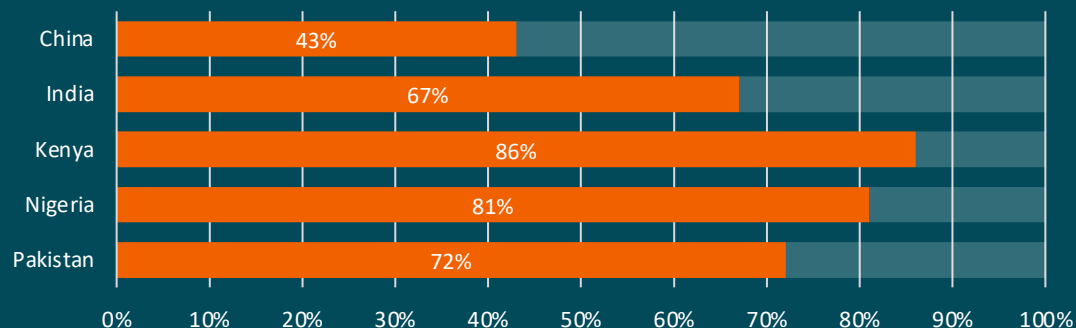
I'm happy to go to a middle-tier university, if the price is right



# GEN Z OUTLOOK: PERCEIVED STATUS IS MORE IMPORTANT IN CHINA – OUTCOMES IN MORE VALUE-DRIVEN MARKETS



...believe it's important to go to an elite, highly ranked university, even if it is more expensive



...want to study for a degree that gives me the skills I need for my future; the ranking is far less important to me



## 2. BEING THERE MATTERS

- a. MEETING STUDENTS IN THEIR HOME COUNTRIES
- b. DELIVERING AN EDUCATION WHERE THERE ARE OPPORTUNITIES

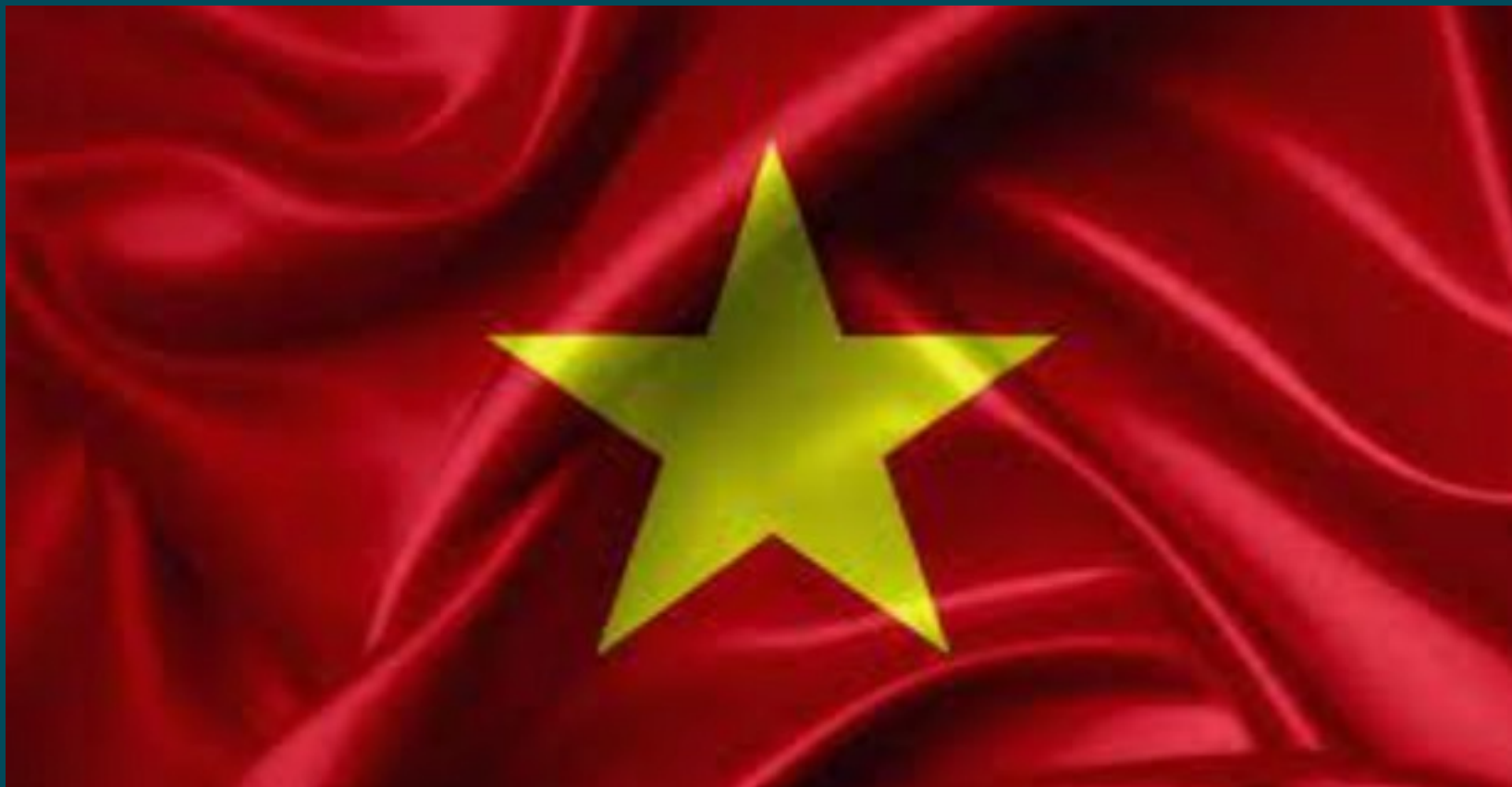
# ONLINE CONTENT IS THE MOST IMPORTANT SOURCE OF INFORMATION, BUT IN-PERSON GUIDANCE IS ALSO KEY

In gathering information for degree study plans, what resources do you think are most useful? (select all that apply)

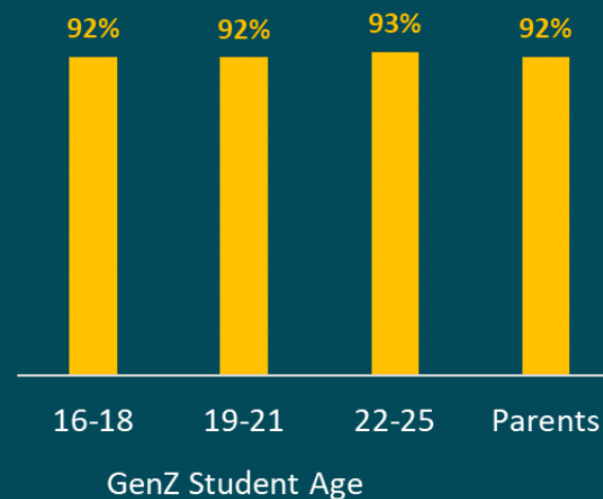
	Vietnamese GenZ	Parents
<b>Any form of online content</b>	91%	88%
Internet research e.g. search engines	70%	52%
Official university website	57%	59%
Social media	34%	39%
Online course finder website	32%	33%
<b>Other forms of engagement</b>		
Meeting/speaking with university representatives	62%	60%
School counselors/teachers	47%	70%
Speak to current/former students of the university	41%	42%
Friends and family	35%	38%
Visit university in person	32%	36%
Education agents	28%	33%
Printed brochure or prospectus	17%	18%



# FACE-TO-FACE CONTACT IS A VITAL PART OF THE JOURNEY



Importance of face-to-face engagement  
with agents or uni representatives  
or discussing study options



*Based on those answering 'Very Important' or 'Important' to this question. Other answers included 'Neither important nor unimportant', 'Not very important', 'Not important at all'.*

# WITH THE EXCEPTION OF CHINA – DEMAND HAS RISEN BEYOND PRE-PANDEMIC LEVELS IN THE US AND THE UK

## F1 Study Visas Issued January-July

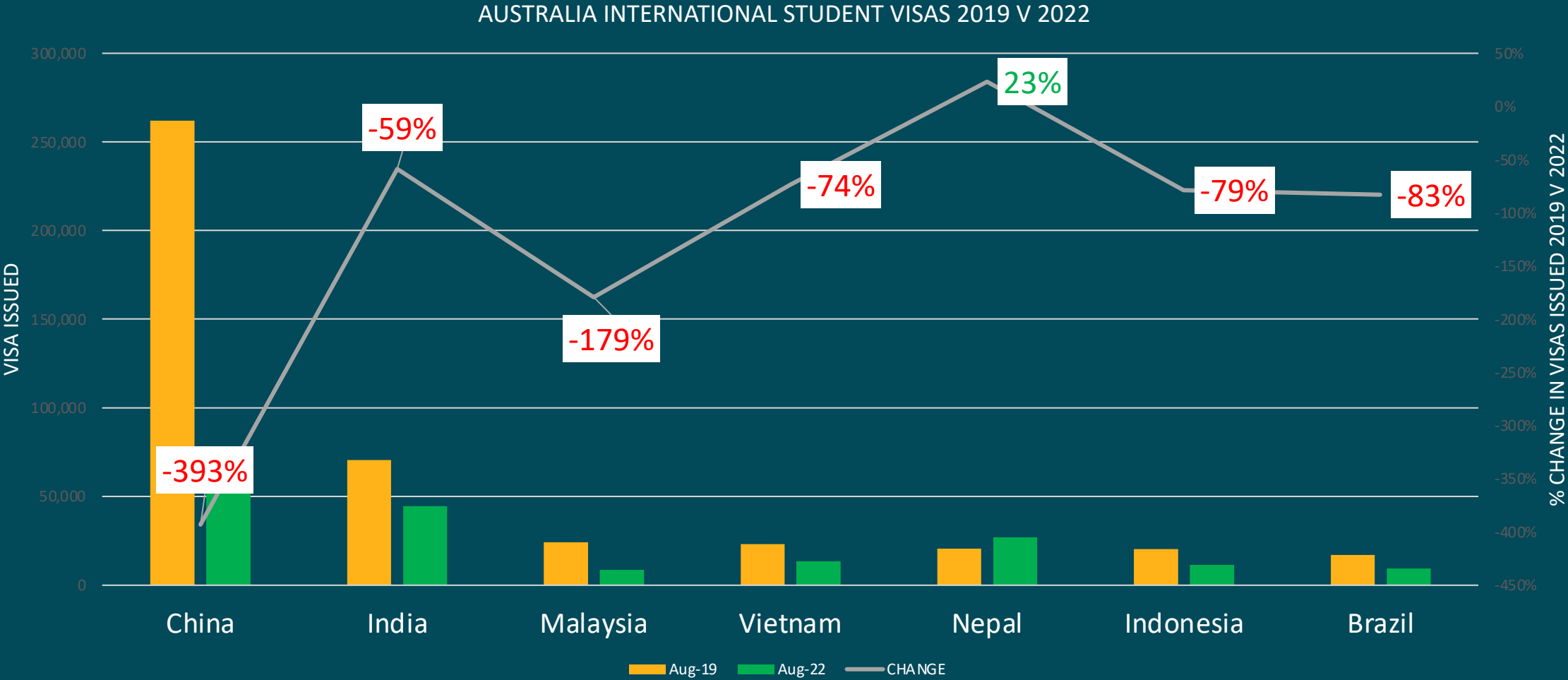
Region	2022 (thousands)	vs 2019
South Asia	89	+139%
China, HK & Macau	48	-46%
East Asia	43	-16%
Europe & Central Asia	38	+7%
The Americas	28	+16%
Middle East & Africa	23	-3%

## Study Visas Issued January-June

Region	2022 (thousands)	vs 2019
South Asia	48	+794%
MEA	20	+281%
China, HK & Macau	12	-65%
East Asia	4	-2%
The Americas	4	+33%
ECA	1	+53%

# BEING THERE MATTERS

## AUSTRALIA HAS NOT YET MATCHED THAT PATTERN – AND CHINA IS A MORE CHALLENGING ISSUE



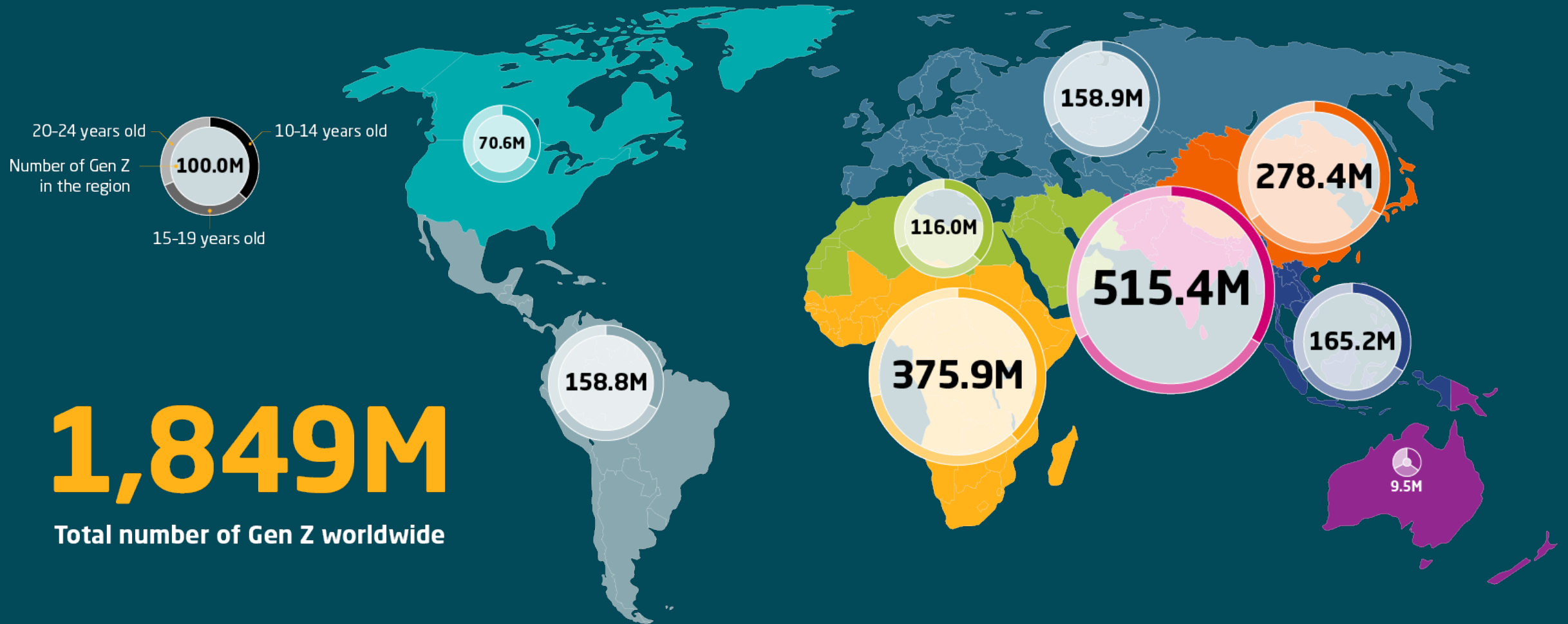


# 3. GEN Z IS NOT HOMOGENOUS

(MAKE YOUR MESSAGING RELEVANT TO THEM)



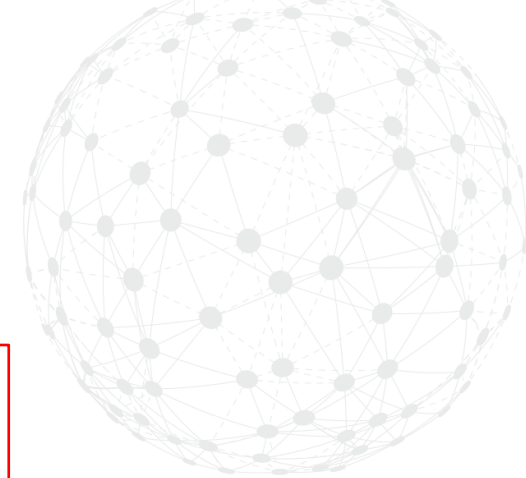
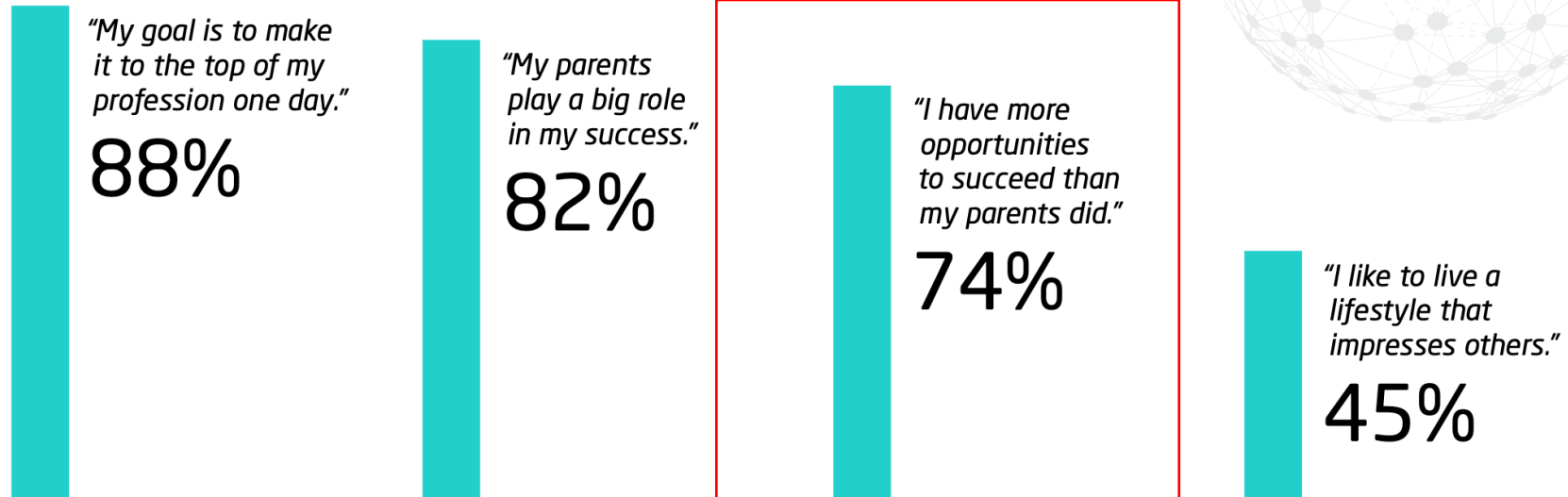
# THERE ARE MORE GEN Z IN SOUTH ASIA THAN THERE ARE PEOPLE IN THE UNITED STATES



# BUT, OUR GEN Z SURVEY IDENTIFIED GREATER LEVELS OF OPTIMISM THAN IS THE CASE IN WESTERN COUNTRIES

As with generations before, Gen Z international students are highly outcome focused, looking to excel in their career. But this generation cares much less about impressing others, though they see their parents as having a key role in helping them be successful in life

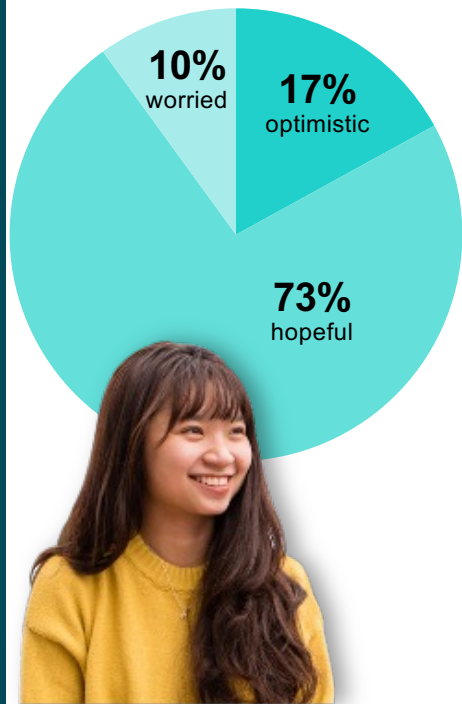
## Are Gen Z international students looking overseas for future career success?



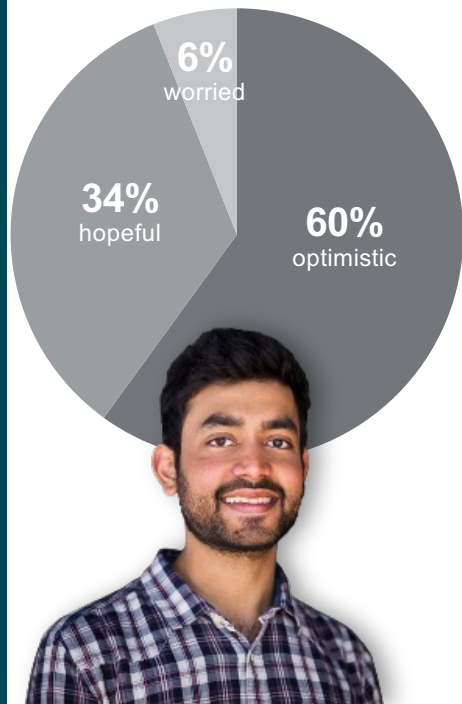
# GEN Z OUTLOOK: A REGIONAL PERSPECTIVE

## MORE THAN 90% FEEL POSITIVE – HOPEFUL OR OPTIMISTIC

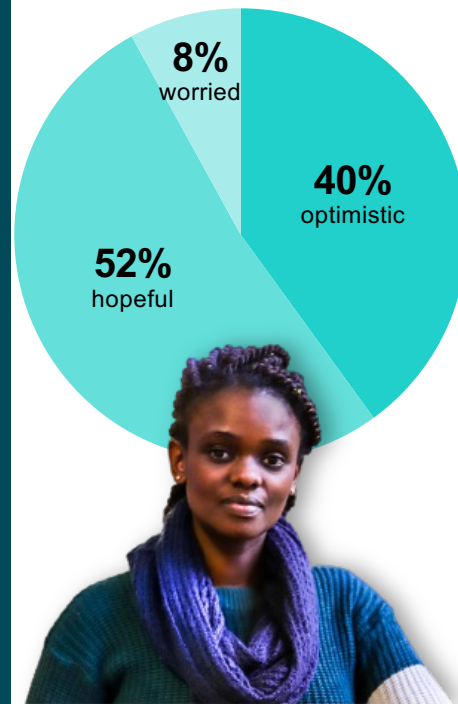
China



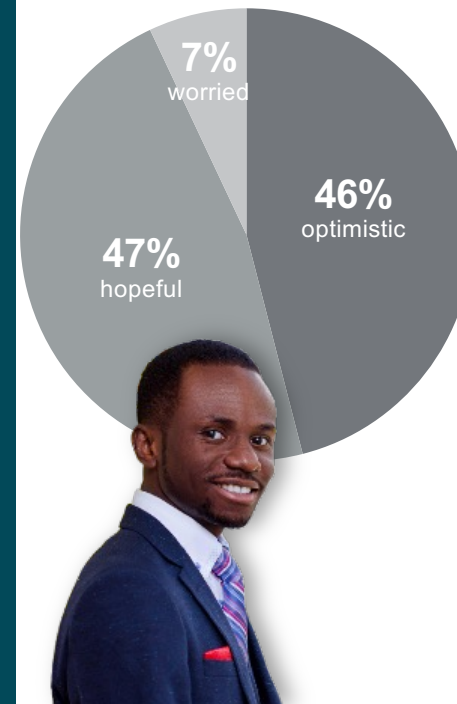
India



Kenya



Nigeria



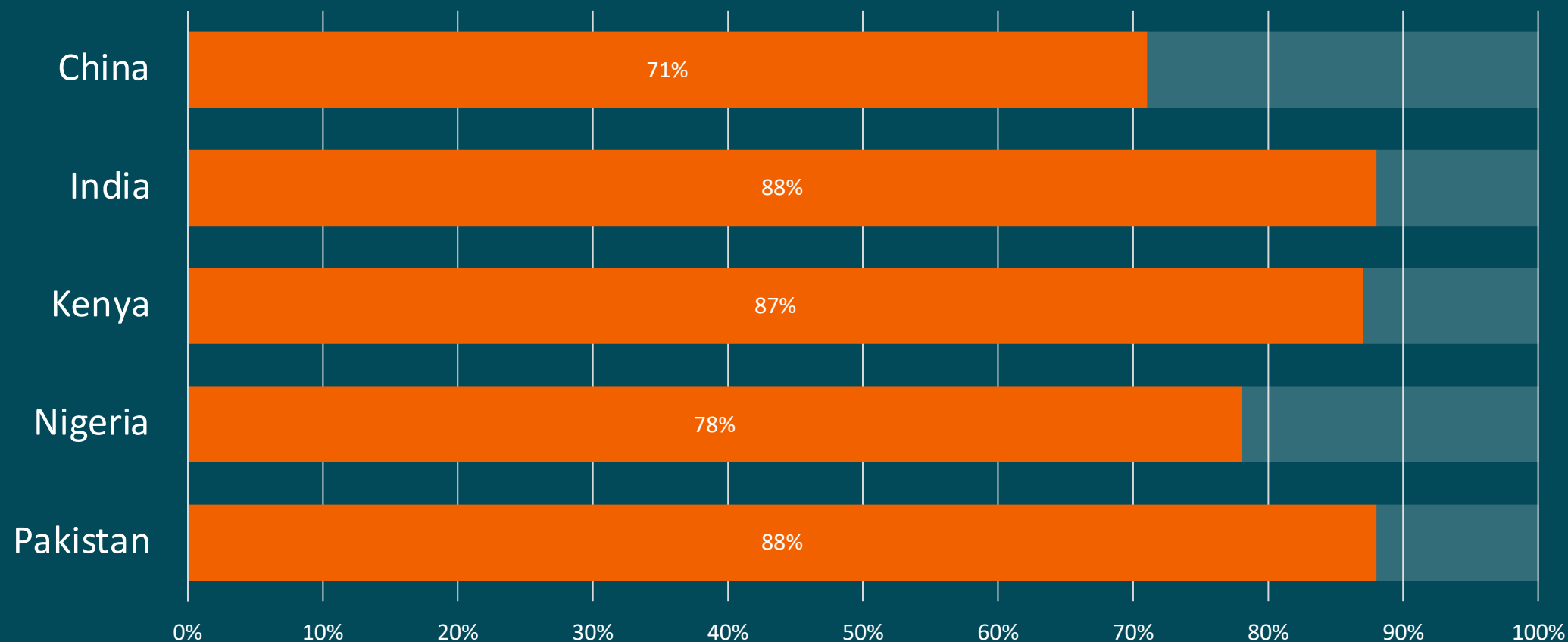
Pakistan



The influence of demographics and geography shaping attitudes?

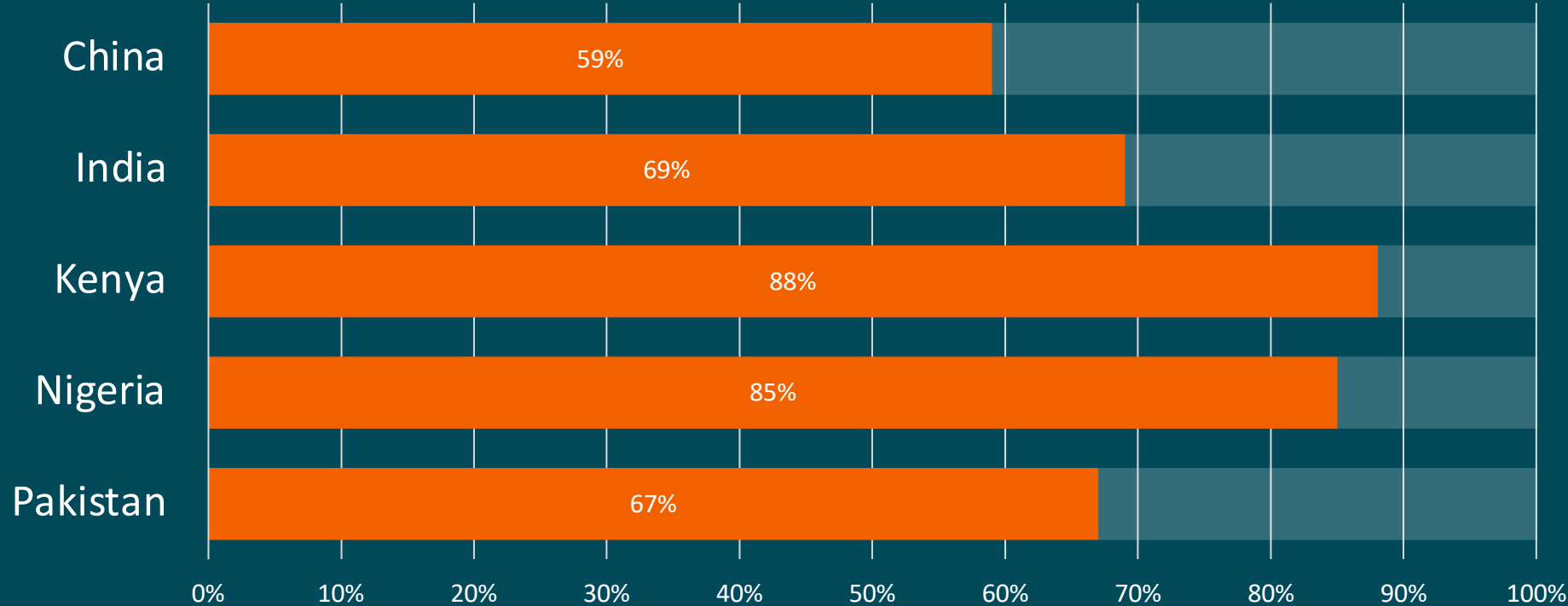
# GLOBAL GEN Z OUTLOOK: PARENTAL INFLUENCE IS VERY POWERFUL – MORE SO THAN ELSEWHERE

## My parents play a big role in my success





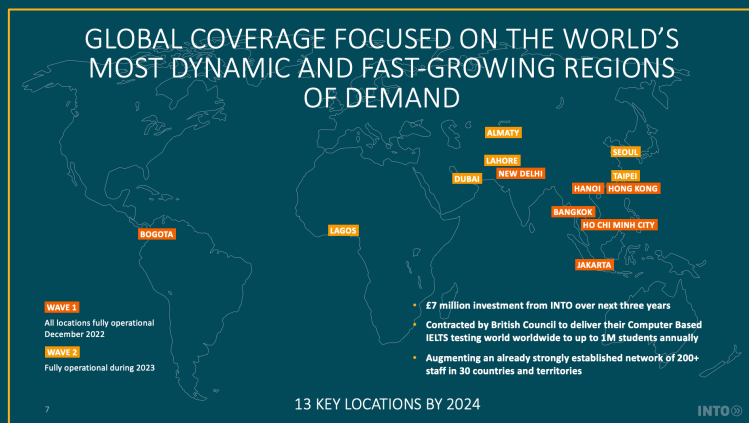
# GEN Z GLOBAL OUTLOOK: COUNTRIES WITH LARGER YOUNG POPULATIONS AND IN EMERGING ECONOMIES SEE INTERNATIONAL EDUCATION AS A KEY ROUTE TO A BETTER LIFE



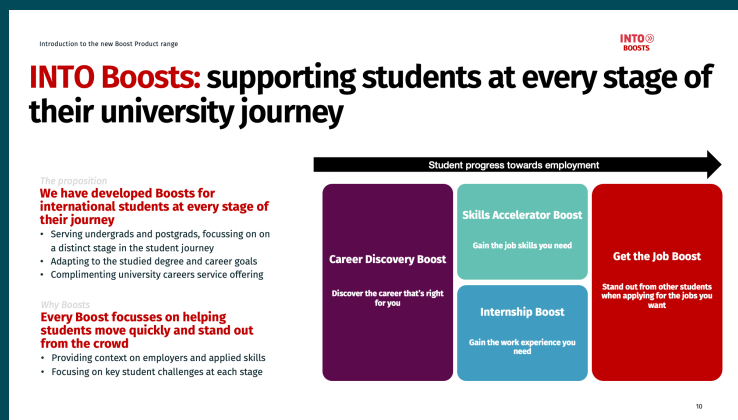
74%

believe they have  
more opportunities  
than their parents

# HOW HAS THE RESEARCH SHAPED OUR STRATEGIC APPROACH?



INVESTING IN 13 FLAGSHIP STUDY HUBS IN WORLD'S FASTEST GROWING AREAS OF STUDENT DEMAND

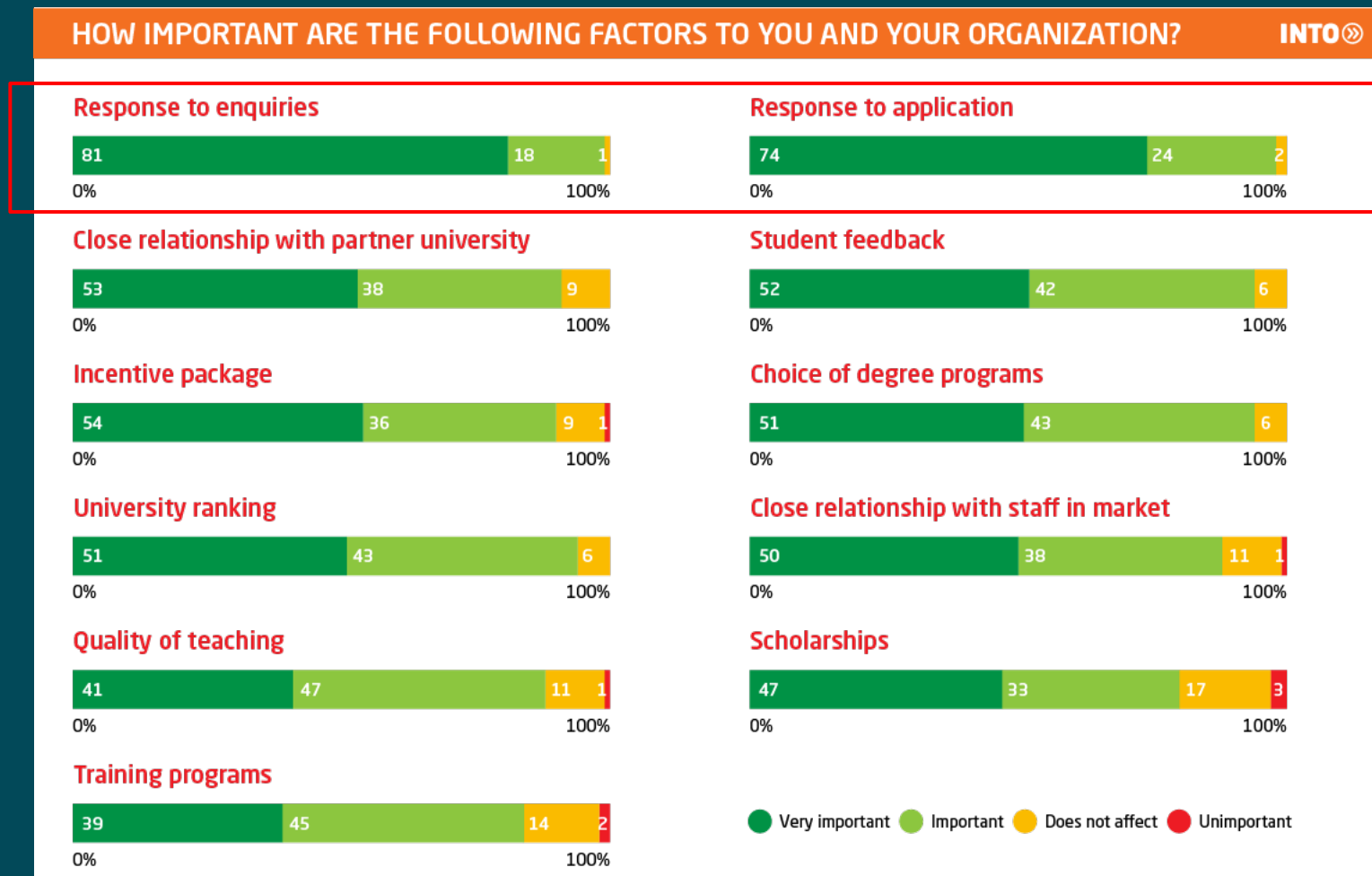


EMBEDDING EMPLOYABILITY FOR INTERNATIONAL STUDENTS



CUSTOMIZING MESSAGING FOR OUR PARTNERS

# EXPECTATIONS OF SERVICE ARE A KEY DRIVER – ESPECIALLY FOR GEN Z



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# Thank you for attending this session

