



Recruitment to master's programmes autumn 2024

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1 Background and purpose

KTH experienced a significant increase in new registered master's students for the autumn intake 2024. The purpose of this report is to examine underlying factors contributing to this development. Several aspects have been investigated, including statistics, global and national student recruitment trends and the role of communication and support to international students. To support the analysis, we conducted a survey of new fee-paying master's students and focus groups with master's students from selected countries.

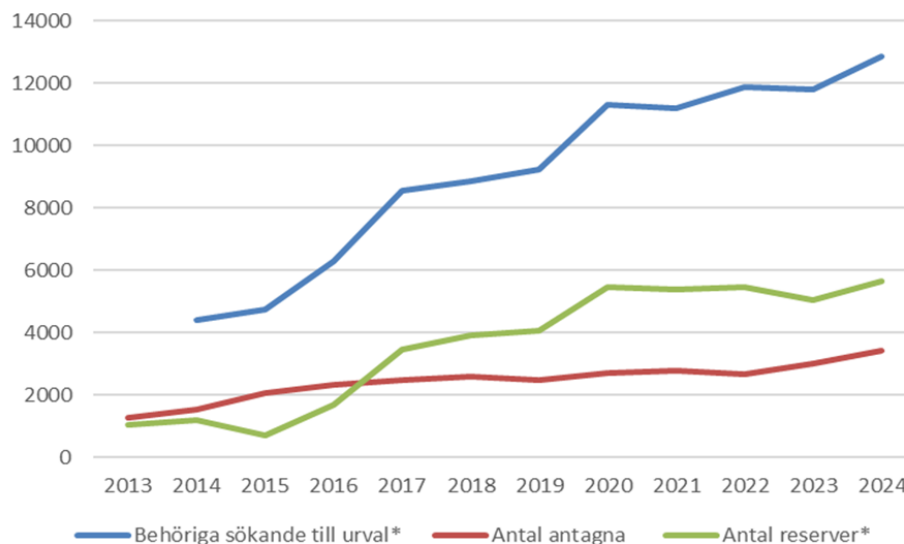
2 Statistics for intake to master's programmes autumn 2024

Complete and comparable statistics from application, admission and registration can be provided for KTH master's programmes, excl. joint programmes using application systems other than University Admission. Statistics regarding registered students can be provided for all student categories, including joint programmes. All numbers are based on official KTH statistics but can differ slightly due to, for instance, the date of retrieval.

2.1 Qualified applicants, admitted and registered students

The number of qualified applicants to KTH master's programmes has grown steadily over the years, providing a good foundation for selective admission with quality in focus. In 2024, KTH received 12 858 qualified applications, an increase of 9 % (+13 % in individual applicants). KTH admitted 3423 students, an increase of 14 % (3001 in 2023 and 2665 in 2022). The overall acceptance rate in 2024 was 38 % based on the share of qualified applicants that were admitted.

Number of qualified applicants 2013-2024



*not unique individuals

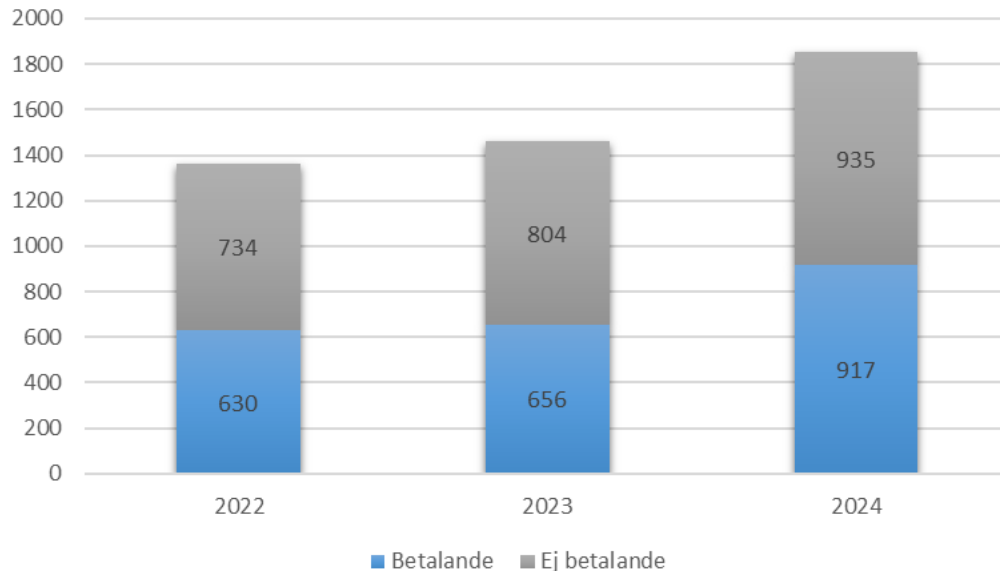
The conversion rate from admitted to registered has been very stable for KTH master's programmes over the past few years; 25-27 % for fee-paying students and slightly over 60 % for non-fee-paying students. The main reason for dropout among fee-paying students is lack of finances, and for non-fee-paying students admission to another university.¹ However, in 2024 a larger share of fee-paying students

¹ KTH International Student Survey 2016-2022

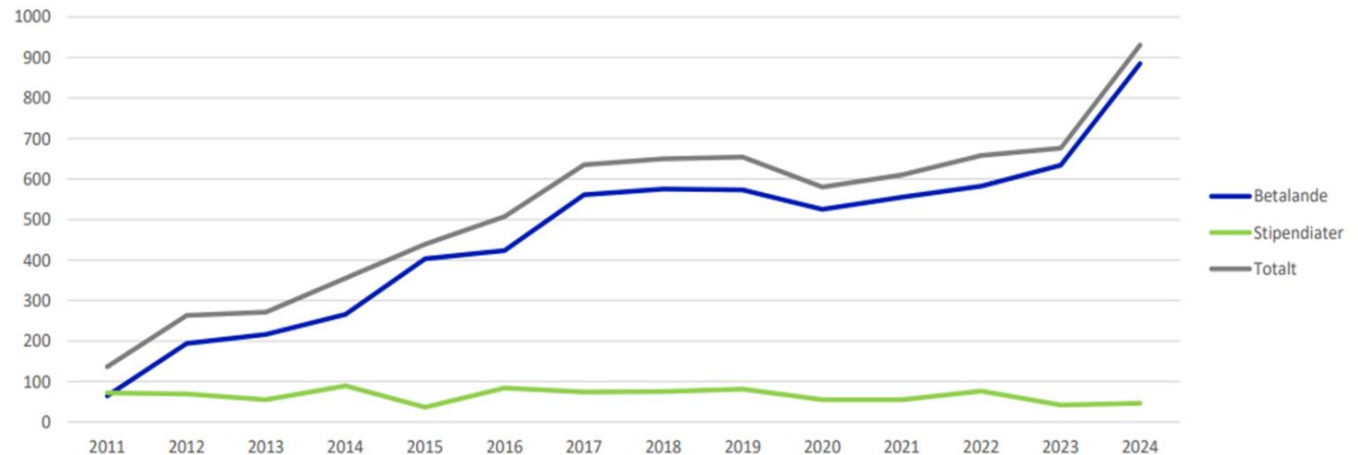
registered, namely 34 %, leading to 703 students compared to 489 in 2023. The conversion rate for non-fee-paying remained the same as in previous years.

The total number of new registered master's students in autumn 2024, including all joint programmes, is 917 fee-paying students (+ 40 %) and 935 non-fee-paying (+ 16 %), in total 1852 students (+ 27 %).

Total number of registered new master's students 2022-24



Number of registered fee-paying students, including scholarship holders

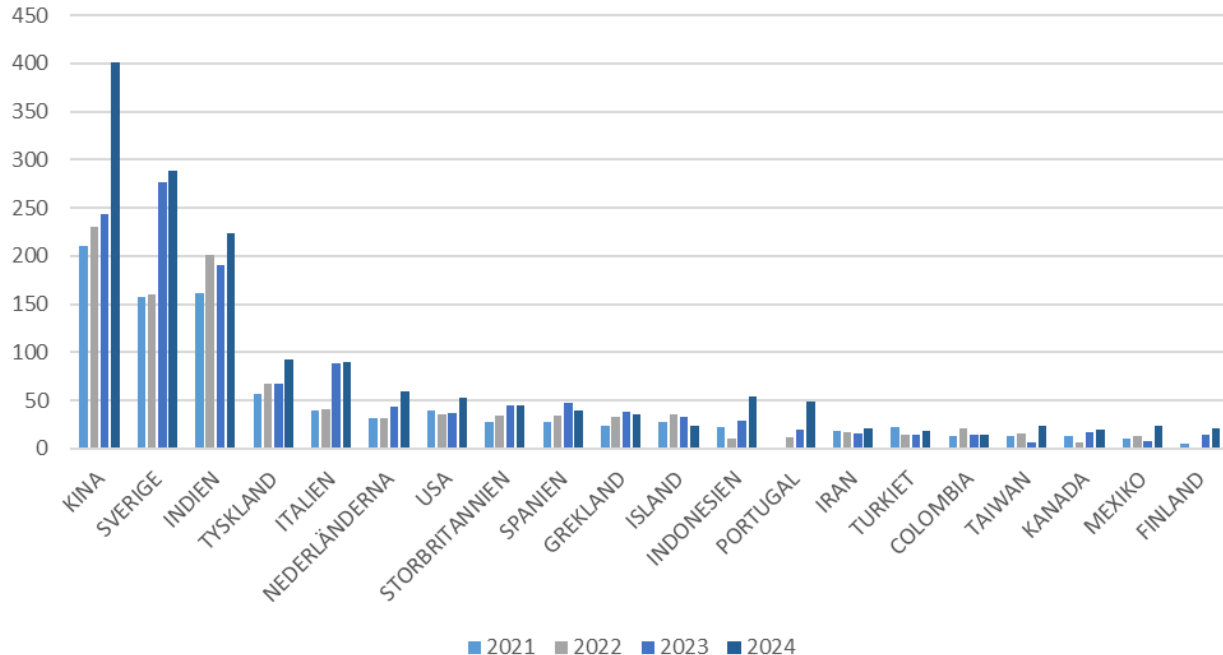


Similar to previous years, KTH had a relatively low amount of refunds of tuition fees based on, for instance, migration issues or illness. In 2024 the total number of refunds was 59 (compared to 61 in 2023), among which some were due to changed status to non fee-paying, 11 were due to refused or delayed residence permit. The process for residence permits worked relatively well in 2024 with shorter average lead times and fewer delays compared to previous years.

2.2 Country of previous education

The trend in student numbers varies between countries. In 2024 China had the largest increase in numbers to 401 students, +65 % compared to 2023, and countries like Indonesia, Portugal, Taiwan and Mexico had the largest percentage increase.

Country of previous education, new master's students 2021-2024



The number of Chinese students rose by 65% from 2023 to 2024, reaching over 400 - a significant jump after several years of maintaining numbers in the range of 200-250. This growth was partly driven by an increase of students from Chinese partner universities, which saw a 24% rise in student intake, while the 3+2 agreements grew by 19%. However, much of the surge came from students at non-partner universities. Among students from mainland China, the increase by university ranking group was as follows: +18% for top 15 universities, +90% for universities ranked 16-50, and +109% for universities ranked below 50.² For a detailed analysis regarding recruitment of Chinese students, see Appendix C.

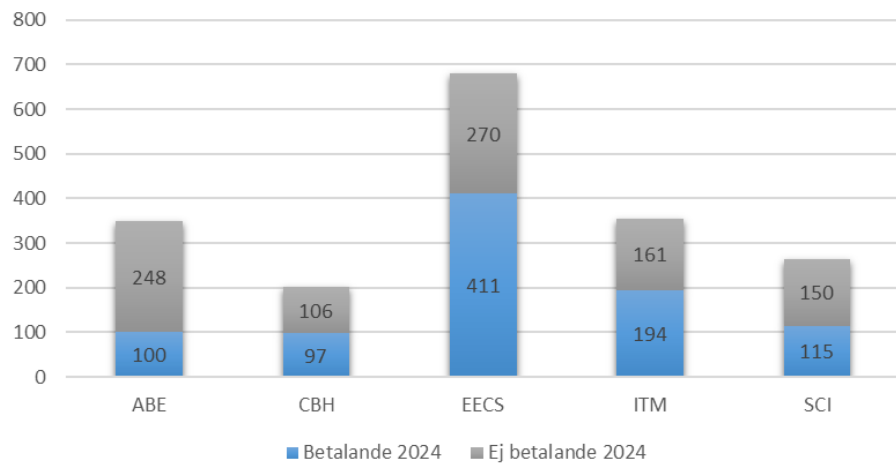
The significant increase in Indonesian students (+86 %) is largely driven by a growing number of scholarship recipients from the national scholarship organisation LPDP (Indonesian Endowment Fund for Education). KTH has a long-term partnership with LPDP, based on close cooperation and joint communication activities as well as adjustment of individual support and internal deadlines of, for example, tuition fee payments and accommodation, to enable LPDP students to study at KTH. Besides funding opportunities, the cooperation with LPDP generates increased visibility for KTH. This large increase of Indonesian students is not a trend seen on national level for Sweden in 2024.

2.3 Breakdown on schools and programmes

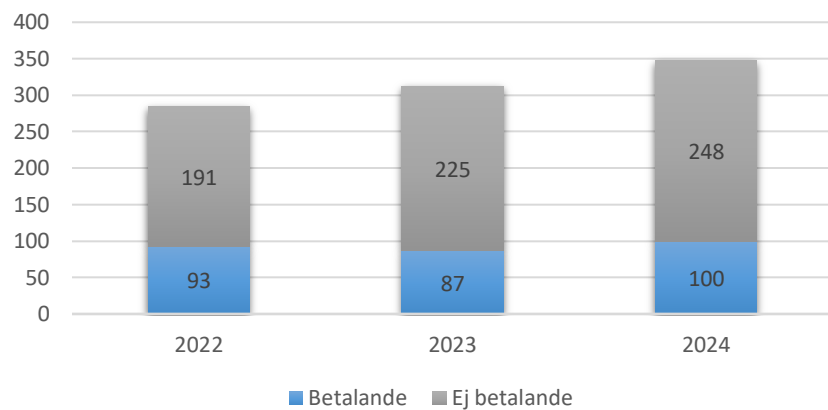
When looking at student flows the trend varies between schools and programmes, which has also been the case in previous years. While all schools experience a larger number of master's students in 2024, some programmes remain at the same numbers or decrease compared to 2023.

New registered master's students ht24 per school (not including "civilingenjör")

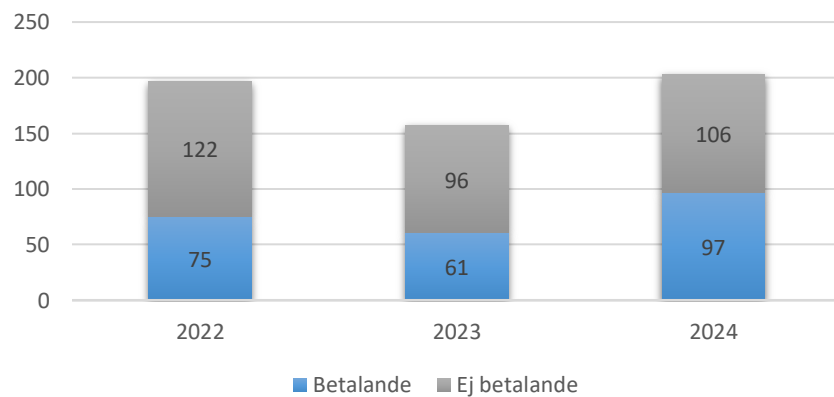
² [Best Chinese University Ranking](#)



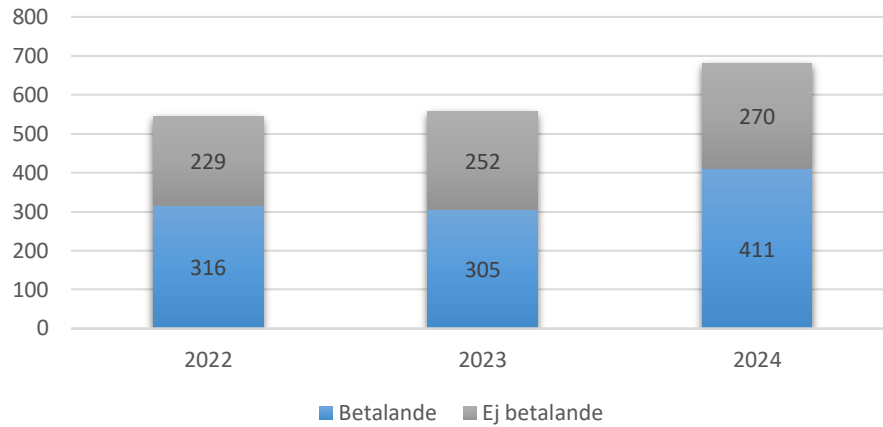
ABE



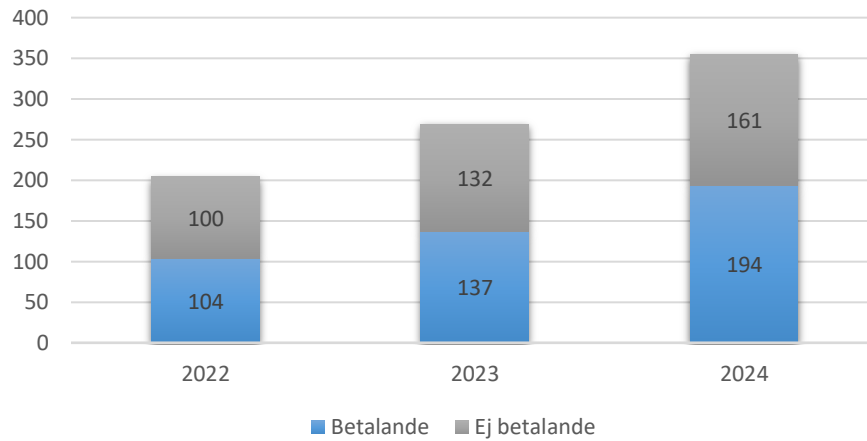
CBH



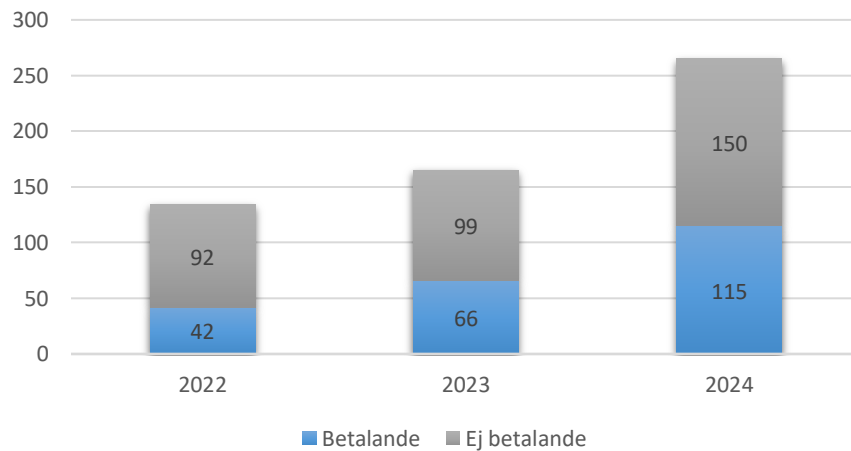
EECS



ITM



SCI

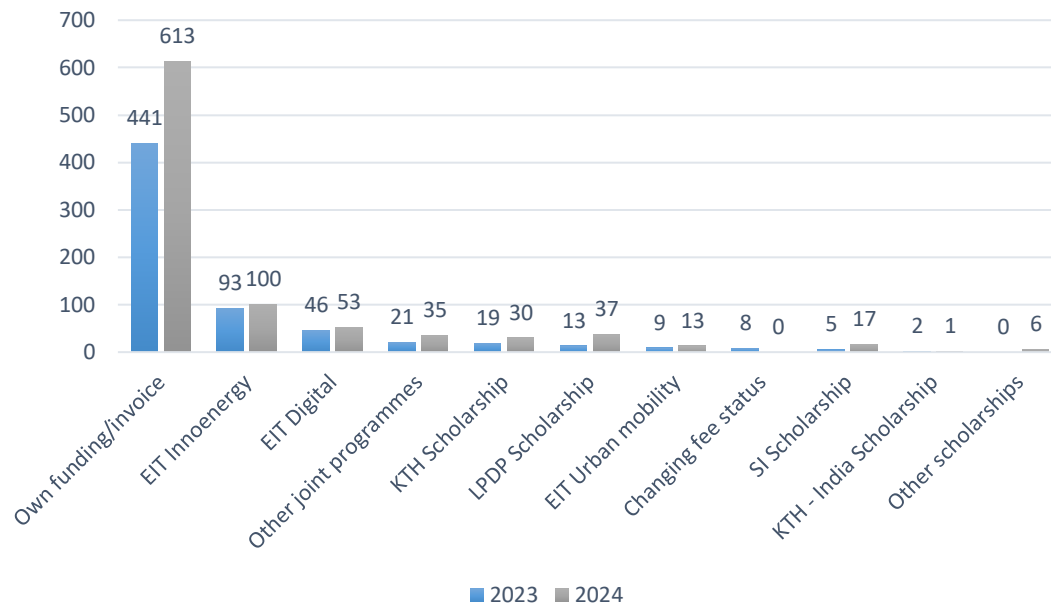


Additional school-specific statistics can be found in Appendix 2.

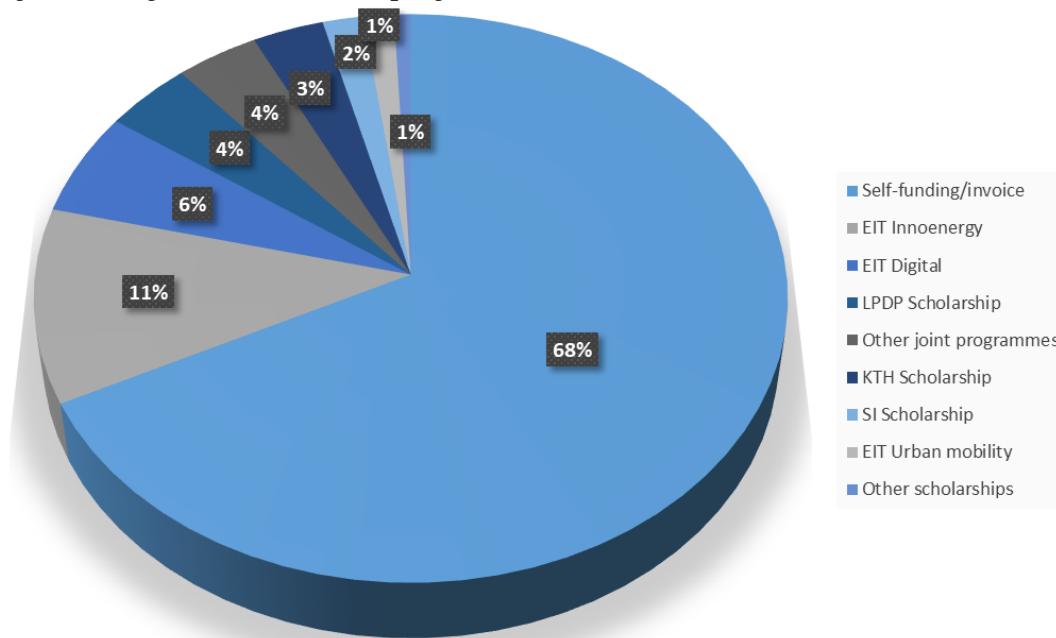
2.4 Payment categories

The number of self-funded students increased from 441 to 613 students. Another trend was a significant growth in scholarship holders from the Indonesian organisation LPDP. The self-funded category can include students with scholarships from other parties than KTH, SI or LPDP. The number of EIT students increased slightly but less than other categories, resulting in a smaller share. The number of scholarship holders from the KTH and SI scholarship programmes returned to a more normal level, after a significant drop in 2023. A new joint programme in Biostatistics and Data Science (with Karolinska Institute and Stockholm University) contributes to a larger number of students in “Other joint programmes”.

Payment categories, new master's students ht23-24



Payment categories new master's programme students ht24



3 How KTH schools and programmes were affected by the increase

All schools were asked a few questions on how the increase in number of master's students 2024 affected them and what their current plans for the upcoming year entails.

ABE

The three programmes that responded were all positive about this year's growth in the number of new master's students. One expectation was that the increase would lead to more students in the less popular courses or tracks. However, the outcome was that students were not evenly distributed, and the most attractive courses ended up with more students, while smaller courses experienced fewer students than anticipated. There was also a growing need for teaching assistants. At this point, ABE is aiming for a slight increase in the number of master's students for the coming year.

CBH

The school was positive about the increase, as it aligns with their ambition to recruit more fee-paying students. The increase came with some challenges, such as the need to adapt or upscale certain courses. Improved tools to predict or plan the number of students would be beneficial for earlier prognosis. For the coming year, CBH aims to further increase the number of fee-paying students, if possible, or alternatively, maintain the current level.

EECS

The school was generally positive about having more master's students, and the fact that the increase was fairly evenly distributed across the programmes. The presence of international students helped balance the fluctuating numbers of internal (KTH) students choosing their master's programmes. Adjustments in course planning were necessary but were handled without major difficulties. The school finds it challenging not to be able to fully predict or plan the number of master's students, as both internal and external student numbers vary significantly from year to year. It is particularly difficult to forecast the conversion rate for newly admitted master's students in the coming year. It is also worth noting that the increase in international student numbers mainly led to more students from China and India, which does not contribute to more diversity in the classroom. There are ongoing discussions regarding the ambitions for next year and the school will not aim to increase the number of fee-paying students further.

ITM and SCI

ITM and SCI responded that they were unable to answer the questions at this time, as discussions are ongoing regarding the schools' reform agenda, the dimensioning of education, and balanced finances.

Summary

The three schools that answered the questions were positive about the increase and have been able to handle the related practical challenges without major difficulties. At this point, CBH and ABE aim to further increase the number of master's students in 2025, if possible, while EECS aims to maintain the current level or possibly decrease depending on the outcome of ongoing discussions.

4 Factors influencing international student recruitment

4.1 Global factors

In recent years, many Western countries have implemented protectionist measures that create barriers for international students. According to a survey performed by NAFSA 93% of universities responding in Canada, 58% in the US and 61% in the UK saw restrictive government policies and/or problems obtaining a visa as a significant issue. This was a significant issue for over half of higher education institutions surveyed³. In contrast, Sweden has remained open and unaffected by these restrictions.

It is difficult to claim a correlation between these measures and the rise of registered students at KTH. Nonetheless, below are some examples of study destinations that have increased barriers:

Norway: Historically, Norway offered free education to all students, regardless of nationality. However, starting in 2023, Norway implemented tuition fees for students from outside the EU/EEA and Switzerland, ranging from NOK 80 000 to 400 000 per academic year⁴. For instance, tuition fees at NTNU for a master's degree in engineering are approximately 50% higher than KTH those of KTH.

UK: The UK has introduced measures to curb net migration, including restrictions on international students bringing dependents. In May 2023, the Home Office announced plans to limit the ability of international students to bring family members, effective from January 2024. Such policies may deter students seeking a more accommodating environment⁵.

Australia: In August 2024, the Australian government announced plans to cap international student enrolments at 270,000, with specific limits for each university. This move aims to address immigration challenges but has raised concerns about potential revenue losses and job cuts within universities. Furthermore, on July 1, 2024, Australia increased the fee for international student visas from \$710 to \$1,600. Additionally, policy changes have made it more challenging for international students to remain and work in Australia after completing their studies. These factors contribute to Australia's declining appeal as a study destination⁶.

Canada: In January 2024, Canada announced a two-year cap on study permits, aiming to approve approximately 360,000 permits in 2024—a 35% reduction from 2023. This measure seeks to address housing shortages and ensure sustainable population growth, potentially making Canada a less accessible option for international students⁷.

The Netherlands: The Dutch government has proposed measures to limit the influx of international students, including capping enrolments in popular foreign-language courses and increasing the availability of Dutch-language programmes. These policies aim to alleviate pressure on housing and educational resources but may reduce the Netherlands' attractiveness to international students⁸.

USA: Although inflation has implicated high costs for international students in the USA, the country is still the most popular student destination of the world. However, the number of Chinese students has dropped by 4% this year, with a continuous decreasing trend since the pandemic⁹.

³ NAFSA 2024

⁴ <https://www.universityworldnews.com/post.php?story=20241025222057374>

⁵ <https://www.universityworldnews.com/post.php?story=20241016154341117>

⁶ <https://www.universityworldnews.com/post.php?story=20241011102906929>

⁷ <https://www.universityworldnews.com/post.php?story=20241126130240902>

⁸ <https://www.universityworldnews.com/post.php?story=20241129102844463>

⁹ <https://www.statista.com/statistics/372900/number-of-chinese-students-that-study-in-the-us/>

4.2 National factors

Comparing to some popular countries for international students (mentioned in the section above), Sweden has remained relatively open and unaffected by restrictions, caps, or barriers for international students. This openness has likely, to some extent, redirected interest toward Sweden, as students face increasing obstacles or find their previously preferred study destinations less attractive and welcoming. As a result, Sweden has likely become a more appealing option for those seeking fewer barriers in their educational journey. However, it is difficult to establish a direct correlation between these factors and the rise in registered students at KTH.

Sweden has also faced its share of challenges in recent years, with incidents such as the burning of the Quran and gang-related crime having the most significant negative impact on the country's image, according to the Swedish Institute. The negative effects are mainly associated with a few countries, such as Turkey and other nations in the Middle East (due to the Quran burning), and the Nordic countries and Germany (in relation to crime). However, overall, the nation's brand is strong. Sweden stays attractive for trade and investment, the green transition, as well as democracy and strong governments.¹⁰

From the survey and focus groups conducted with students this autumn, we can conclude that factors favouring Sweden include the job-seeking residence permit after graduation, good value for money when it comes to tuition fees and living expenses, safety, and work-life balance.

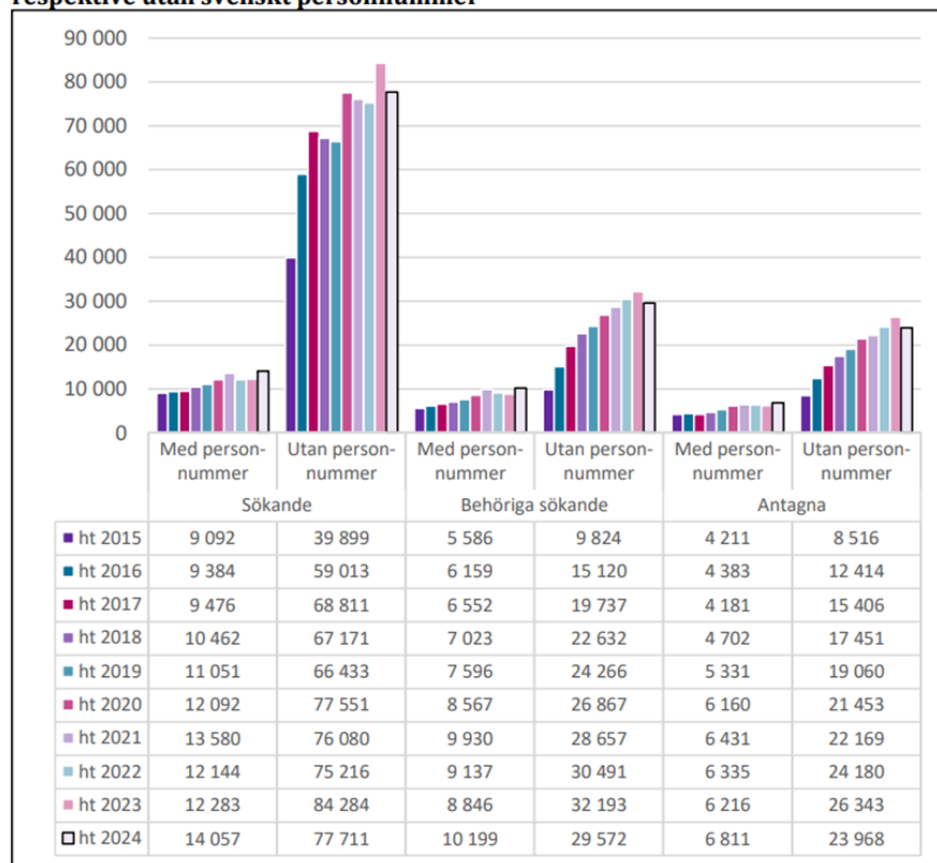
At the national level, the number of qualified applicants for MasterHT24 (without Swedish personal security numbers) decreased by 8% in 2024, and the number of admitted students dropped by 9% compared to 2023¹¹. In contrast, KTH experienced a 13% increase in qualified applicants and a 14% increase in admitted students (we do not separate applicants according to personal security number). This suggests that the growth in applications at KTH is unique to the institution, rather than reflecting a broader trend of growing interest in Sweden as a study destination.

Official national statistics for 2024 regarding registered students have yet to be made available. In discussions with larger Swedish universities, some—though not all—reported an increase in the number of new master's students, particularly among students with a Chinese background. However, few universities saw such a significant increase as KTH. Additionally, most universities have experienced a higher share of dropouts due to reasons such as migration obstacles. These trends will be further analysed once official statistics are available in 2025.

¹⁰ [The image of Sweden abroad 2023 - Svenska institutet](#)

¹¹ <https://www.uhr.se/globalassets/uhr.se/publikationer/2024/antagning-till-hogre-utbildning-ht-2024---trender.pdf>

Figur 30: Antalet sökande (inklusive sena anmälningar), behöriga sökande och antagna vid urvalet till MASTER ht 2015–ht 2024, fördelade efter sökande med respektive utan svenskt personnummer



4.3 KTH communication and support to prospective students

Given the increase in the share of admitted students who followed through and registered at KTH, we will mainly look closer at the communication and support for admitted students and what might have affected the conversion rate. A brief summary of activities for visibility and awareness is also provided.

Communication channels to create visibility and first awareness of KTH

KTH uses the following communication channels to reach out to new prospective students:

- Digital advertising with KTH-general and programme specific ads to a selected regions and target audiences. The ads generated 8.3 million visitors and approximately 30 % of the clicks on “Apply now on kth.se/studies the last year.
- Collaborations with ranking institutions and web portals such as QS Top Universities, Times Higher Education, Educations.com, Mastersportal.com, Studyportals.com, Study.eu and Postgrad.com, for instance in terms of advanced profile pages, listing of programmes, promotion material, etc.
- Physical and digital education fairs and events directed to specific regions or groups. In 2024 KTH organised or attended in approximately 40 such events, generating connections that are followed up with newsletters.
- Collaboration with partners such as universities, scholarship organisations and embassies, including joint event, webinars to effectively reach out to new student groups.
- Social media channels such as Instagram, LinkedIn, blog and the Chinese channels WeChat and Xiaohongshu are used to give an insight into studies at KTH through a student perspective.

Communication to admitted students

KTH offers extensive communication to admitted students to support their journey, create a sense of community and ultimately to increase the conversion rate between admission and registration.

Website kth.se/newatkth

The section for newly admitted students on kth.se provides information on the practicalities for new students, such as information on tuition fee payments, residence permit, insurance, arrival and introduction, etc. as well as inspirational content about life in Sweden and at KTH. The section was completely revised in 2023 with some minor improvements in 2024. The website is designed to be the hub for our communication to the target group and was considered the most useful channel in the student survey with a rating of 3,69 out of 4.

Webinar series

As in previous years KTH Education Office offered a number of webinars to admitted students with the aim of increasing the number of students choosing KTH and preparing them for arrival to Sweden, Stockholm and KTH. Examples of topics were “Admitted to KTH? These are your next steps”, “Accommodation” and “Arrival and introduction”. The webinars were promoted to admitted students through newsletters, kth.se and social channels. In 2024 the five webinars attracted in total 4 080 live participants, compared to 1 956 in 2023, which can be explained by a larger number of admitted students and successful promotion attracting a larger share of the admitted to join. All webinars offered a live chat with KTH staff and student ambassadors and recordings published on kth.se. The students rated the webinar series as the second most useful communication channel in this year's student survey, with a rating of 3,39 out of 4."

14 programmes offered programme-specific webinars focusing on welcoming students and introducing the programme more in-depth. These webinars received a rating of 3,21 out of 4.

Digital 1-1 meetings - Connect with a KTH student

The “Connect with a KTH Student” project is an annual activity designed to increase the number of admitted international students who enrol at KTH. Recognising that the highest dropout occurs between March and May, the project connects newly admitted students with current master’s students from the same programme in personalised one-on-one meetings. The meetings are conducted on Zoom or other online platforms, after an initial contact has been established via e-mail.

The primary goal of this activity is to inspire admitted students to accept their offers by providing a warm welcome, addressing concerns, and showcasing the benefits of studying at KTH. Personalised communication has proven to be a decisive factor in influencing enrolment decisions, particularly for students considering offers from multiple universities.

In 2024, invitations for one-on-one meetings were sent to the 3,400 admitted students. Of these, nearly 2,200 meetings were held, facilitated by 108 KTH students representing all five schools. A large share of the students highlighted direct peer-to-peer communication as a key factor in their decision to enrol, both in the focus groups and in open answers in the student survey.

Goin’ app for student networking

Since 2023, KTH has transitioned from programme-specific Facebook groups to Goin’ Connect, an app for admitted students to network, find peers from their country or programme, and build connections based on shared interests. This platform aims to increase enrolment rates by fostering a sense of belonging to the university they are admitted to and relieving some of the possible stress and anxiety they may experience. For the 2024 intake, improvements included early access for scholarship holders, the presence of student ambassadors and the creation of programme-specific groups, helping students find classmates quickly.

In 2024 Goin' Connect achieved significant growth, with 3,632 students actively using the platform (1,942 in 2023) and an exponential rise in connections, from 13,661 in 2023 to 75,020 in 2024. An average of 20 connections per user were made this year. Student feedback was largely positive, reflecting the platform's success in enhancing community building and excitement about KTH. Goin' also sent out a survey to the community's users, which resulted in 212 responses, of which 98% answered KTH should continue using Goin'. In our student survey Goin' was rated 2.89 out of 4 for usefulness.

Newsletters

The newsletters' purpose is to deepen knowledge of KTH, Stockholm, and Sweden and to attract, inform and convert the target audience from interested to applicants, admitted and finally registered students. 12 general newsletters were sent out from admission in March to July, covering a range of topics such as congratulating and welcoming, sharing practical information and deadlines, and inviting them to webinars and other events. In addition, a large number of targeted newsletters were sent to specific groups, for instance invitations to regional information and events.

All admitted students receive our newsletter, making it a key player in our communication. For the target group of approximately 3,400 admitted master's students, we achieved an open rate of around 83.1% and a click-through rate of 22.1% for our 12 newsletters. The first newsletter sent to the admitted students performed the best, with 95 % opening rate and 57% clicked through to the website. The newsletter is the primary source for webinar registrations and from this single newsletter, 2,783 of the 3,400 recipients proceeded to register for one or more webinars.

A great deal of effort has been put into making the newsletters more personal and creating a sense of community and belonging with the university, to increase trust and likelihood of choosing KTH. This includes a more casual tone compared to the slightly more formal tone on the website, addressing students by their first names and incorporating emojis. Surveys indicate that these elements help boost several key performance indicators, which we could also see in our numbers.

Regional events for admitted students

KTH arranged or attended on-site networking events in Italy, China and India. Digital events were offered to other main markets such as Indonesia, Latin America and the rest of Southeast Asia. These events focus on region-specific information for instance regarding scholarships and migration. The most important aspect however is to share stories from current students from the region, answer questions and offer networking opportunities to reduce doubts and confirm KTH as their preferred study destination. In total, 10 regional events were offered and approximately 500 students attended.

Digital event for scholarship nominees

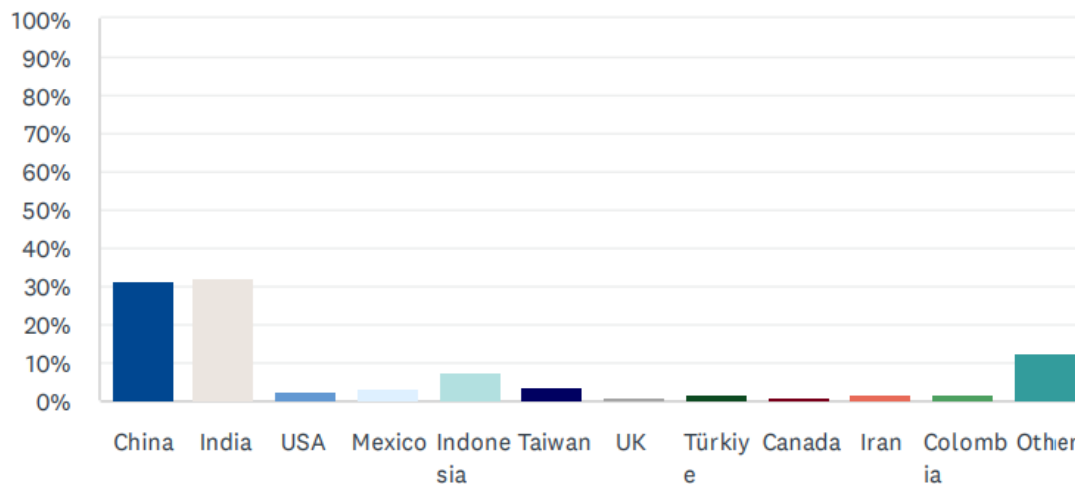
In March 2024, KTH hosted its first-ever digital event tailored for KTH Scholarship nominees, aiming to congratulate them, encourage enrolment and provide early insights into life at KTH. Held within a week of the scholarship announcements, the event featured a welcoming address from the Vice President, a current scholarship holder sharing experiences and Q&A with staff from the Education Office. Out of the 51 scholarship nominees, 33 enrolled, resulting in a 65% conversion rate, which is an 18% increase compared to the previous year. Feedback was overwhelmingly positive, with participants appreciating the personalised support and early interaction.

5 Student survey and focus groups

5.1 Survey to new fee-paying students

A survey was sent to all new fee-paying master's students in the beginning of November 2024, which resulted in 838 successful send-outs. We received 341 answers which gave a 41 % response rate. Some questions are similar to the ones in our previous surveys (for instance KTH International Student Survey 2018-2022) and comparisons can be made. Other questions are new for this group. The main findings are summarised below, and the full survey can be found in the appendix.

Where did you receive your bachelor's degree?



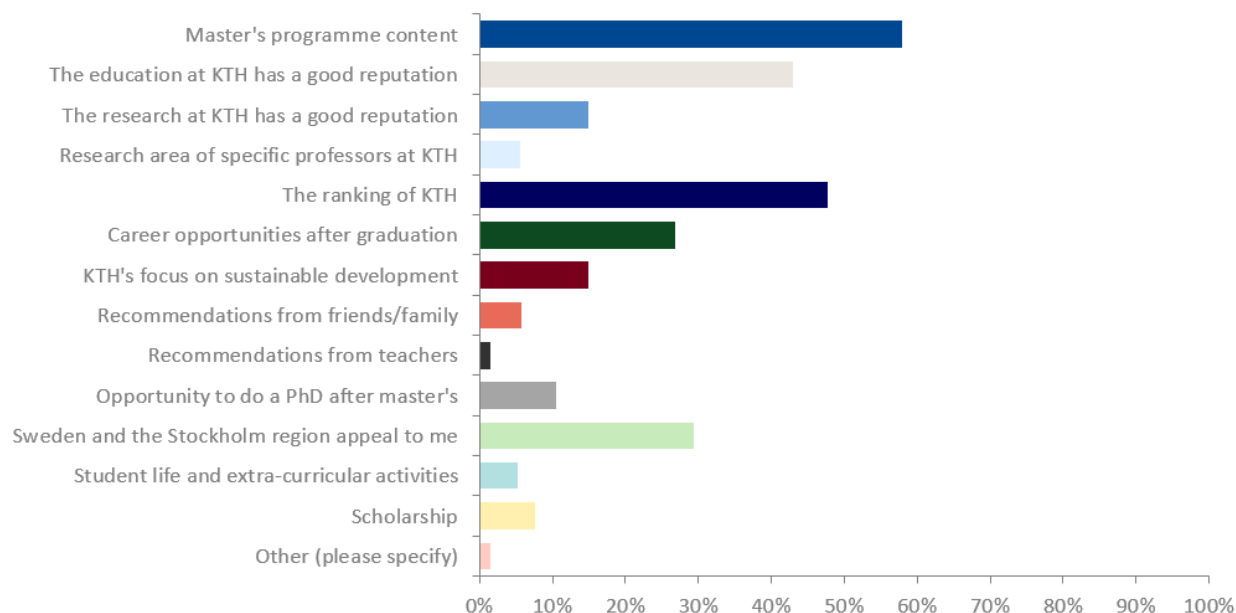
Compared to the student population Chinese students were slightly underrepresented. Apart from that the country representation is relevant. We have looked at the answers for each of the largest countries separately and comment if they differ significantly from the total population.

How did you first find out about KTH? (one option)

The main channels for first awareness are Ranking lists (33 %) and Search Engines (19 %), followed by Family/friends/relatives (17 %) and Current students (6 %) and Exchange agreement (5 %). Search engines (19 %), Education portals (4 %), universityadmissions.se (2 %) received lower ratings than in previous surveys and ranking lists scored higher, which might depend on the fact that this survey was conducted in a later stage. Ranking and social media are more common for Chinese students.

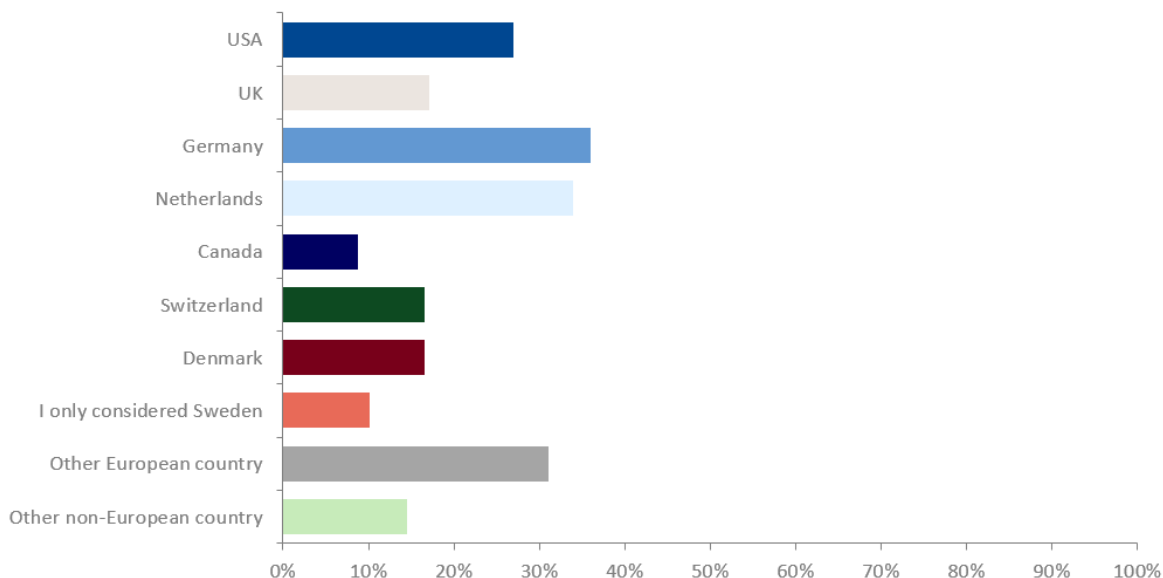
What were your main reasons for choosing KTH? (maximum 3 options)

Similar to our previous surveys, the most common reasons for choosing KTH are the content of the master's programmes, KTH's ranking, the good reputation of our education, Stockholm and Sweden's attractiveness, and career opportunities, in that order. Focus on sustainable development, opportunities for doctoral studies, and scholarships are also important factors. We do not see any significant differences compared to previous surveys. These topics are also the ones we focus on in our communication to prospective students and it is worth mentioning that we work actively with visibility and advanced profile pages on the major ranking sites.



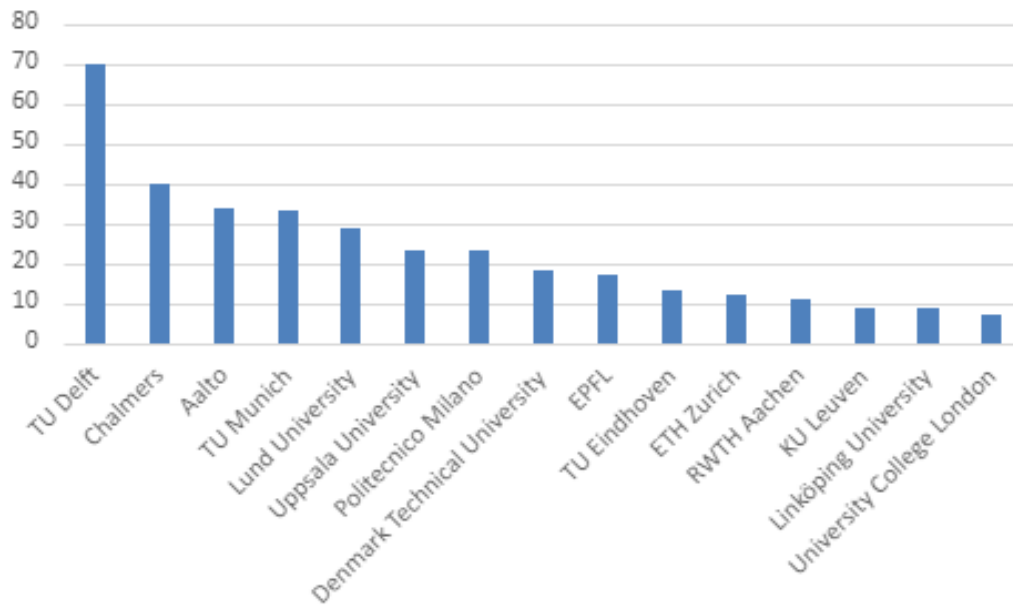
Which other countries did you consider studying in apart from Sweden?

Germany was the most frequent answer, followed by the Netherlands and USA. The German universities TU Munich and RWTH Aachen are popular in the free-text responses. One difference between KTH and German universities is the tuition fees, which in Germany are lower or non-existent, depending on the state. Among other European countries, Finland is the most common country. Only 10% focused solely on Sweden. Chinese respondents are more likely to consider non-European options, and only 5% of them focused solely on Sweden.



Did you apply to other universities?

82% of the respondents applied to universities alternatives other than KTH. The most common alternatives are listed below. Similar to previous surveys, TU Delft is our main competitor followed by other top-ranked Nordic and European universities.

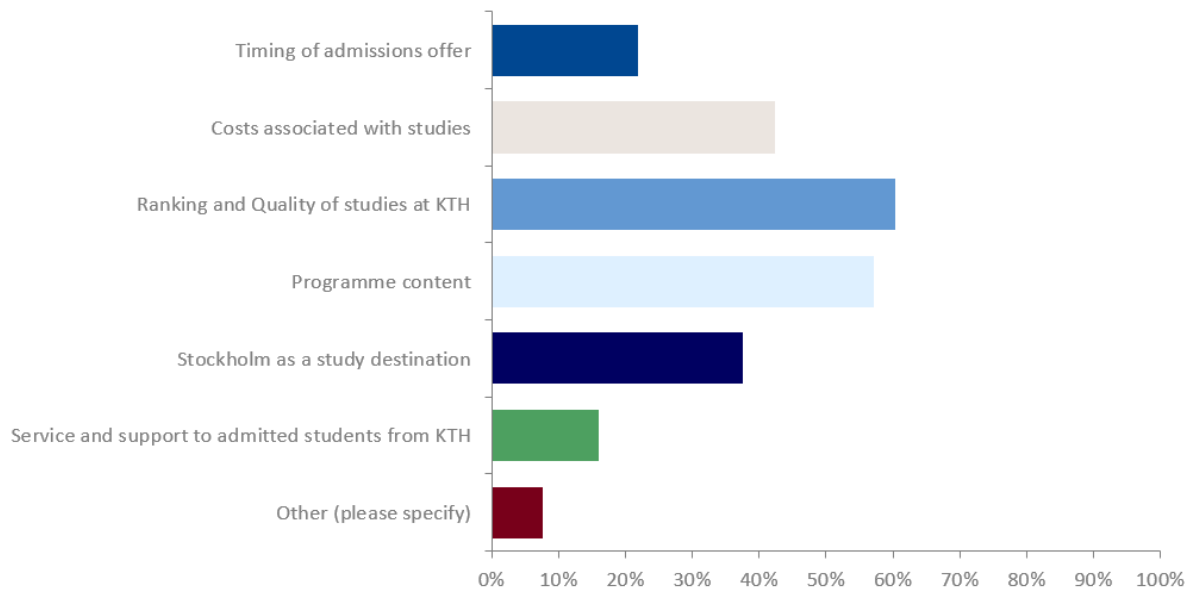


Were you admitted to any other university?

Out of the ones that applied to other universities, 80% were admitted to other options than KTH. In total, that means that 65 % of our new fee-paying master's students were also admitted to other universities, which reinforces our view that recruitment continues all the way until payment and/or registration. Admitted students are still, to a large extent, choosing between different options. We can assume that the other universities they were admitted to are not Swedish, given our common national admissions system.

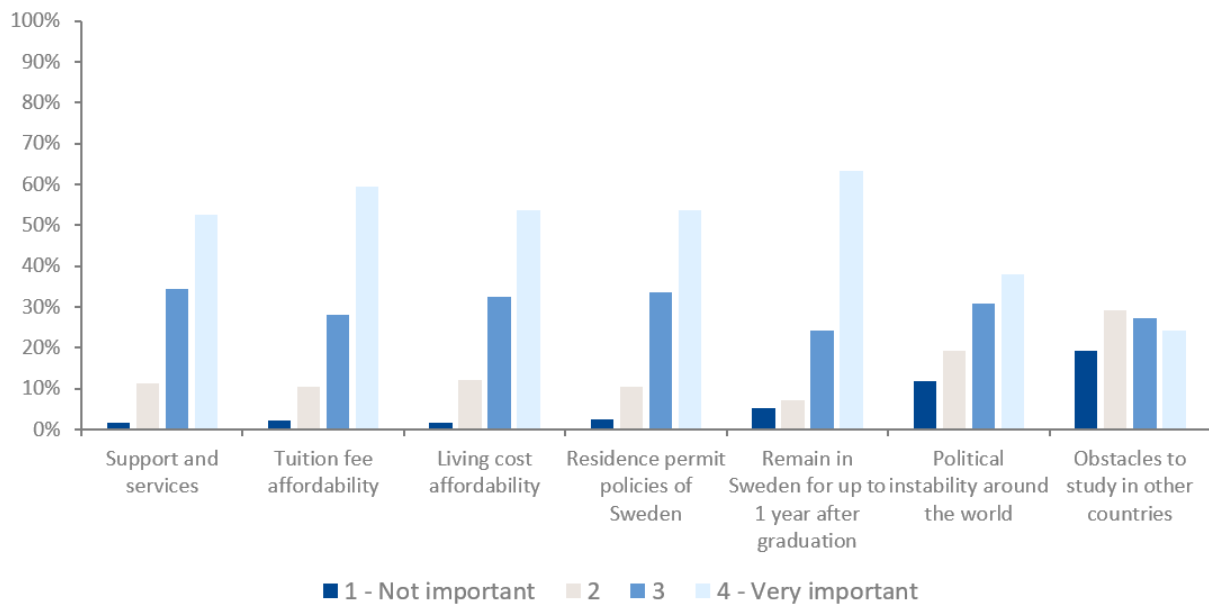
Why did you choose KTH over the other universities?

KTH's ranking and quality of studies and the content of the master's programmes are the most decisive factors when choosing KTH over other universities. 42% of the respondents state that the costs associated with studies was a reason for choosing KTH, and Stockholm as a study destination played an important role for 38 % of the respondents.



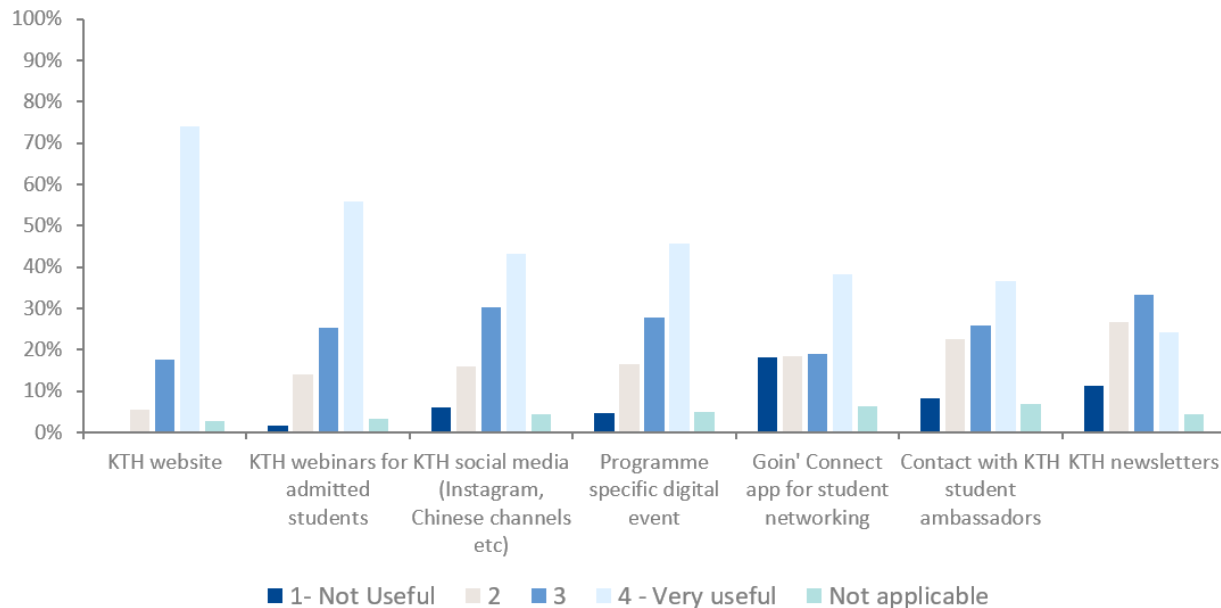
After being admitted to KTH, how important were these factors in choosing to start your studies?

The most important factor among the alternatives was the possibility of remaining in Sweden for up to a year after graduation. The majority of the respondents also found tuition fee affordability, living cost affordability, residence permit policies and support and service to be very important factors. Political instability in the world and obstacles to study in other countries were not among the most important factors. Chinese respondents have similar responses.



How useful were the following communication channels after admission to KTH?

The KTH website is rated the most useful communication channel, with 74 % of the respondents giving top remarks as “very useful” and an average of 3.7 out of 4, followed by webinars, programme specific digital events and social media that all have ratings over 3. All communication channels receive ratings over 2.7.



Can you mention any of KTH’s communication efforts that were particularly useful? (Open answer question)

The survey respondents highlight several specific communication efforts they found particularly useful.

- Webinars were frequently mentioned, especially those tailored for admitted students and region-specific ones, which addressed key concerns about applications, admissions, and preparations.
- Support from student ambassadors was highly valued, including their guidance, personal interactions, email communication, and blogs that provided insights into life at KTH.
- Social media platforms, particularly Instagram and Chinese social media channels, were seen as effective for engaging students and showcasing KTH’s student life.
- The Goin' app was praised for helping students connect with each other and navigate their transition to KTH.
- Many respondents appreciated KTH’s timely and efficient email communication, such as responses via info@kth.se and regular email newsletters.
- KTH’s website was recognised for its well-structured and accessible content, particularly regarding programme details and application information.

Examples of open answers in the student survey:

“Great prompt communication through emails and website”

“The overall website is already very informative and useful. But a very helpful one was the chance to connect with a student who's an ambassador not long after my admittance”

“Goin' was surprisingly helpful, the KTH website is great, and I really appreciated the webinars.”

“Goin was the first thing that helped to connect the classmates from same course and course ambassadors also played a vital role in answering the questions.”

“I asked for help to connect with seniors in KTH Wechat account, and they reply very in time, and got help a lot from the senior”

5.2 Focus groups with students

Four focus group discussions were carried out, with students from China, India, Mexico and Indonesia, representing countries that saw an increase in 2024. Each group consisted of 4-10 randomly invited students. Discussions were held on topics such as initial interest and decision-making process, expectations and perceptions of KTH, the influence of external factors, the role of marketing and communication, scholarships and financial considerations and future career prospects.

China

The focus group revealed that most of the Chinese students first chose the country Sweden for its favourable work visa policies, safety, and relatively low living costs compared to countries like Singapore and Switzerland. After that, they investigated university options, which led them to KTH's suitable programme content. In addition, flexible curriculum, global rankings, strong reputation in STEM fields, and scholarships were major draws. Students appreciated the two-year programme structure, which allowed more in-depth learning and adaptation to the Swedish work-life balance lifestyle compared to shorter programmes in other countries. Most students applied to multiple universities.

The COVID-19 pandemic had a significant impact. Challenges such as travel restrictions and the closure or postponement of standardised tests like TOEFL and IELTS delayed plans for some but ultimately reinforced their determination to study abroad. Assuming a continuous 12-13% increase in student numbers each year from 2020, suggests that around 400 students are expected in 2024.

Internationally, restrictive policies for Chinese students in the US and limited opportunities in some European institutions also guided their decisions. Sweden's reputation for inclusivity and safety contrasted positively with experiences of discrimination in other countries.

Students relied heavily on platforms like Xiaohongshu (KTH's official channel started in February 2024), WeChat, and alumni testimonials for information, valuing direct communication from KTH and scholarship opportunities. Recommendations for future efforts included emphasising Sweden's advantages, scholarships, and post-graduation opportunities through precise and trusted channels.

India

Indian students who chose KTH knew from an early stage that they preferred to study in Europe compared to other destinations like North America and Australia. They value the work-life balance on offer in European societies and they consider Sweden as a safe and affordable destination. Although the cost of living and tuition fees in Stockholm and KTH can be higher than other destinations, they consider it value for money when comparing the quality of the programme and rankings. Being able to study and live in

Sweden without needing proficiency in Swedish is also a factor. The opportunity to stay in Sweden for a year after graduation to pursue jobs and long-term benefits that come with settling in Sweden also played a part in their choice. However, current students are worried about job prospects upon graduation due to the current dip in the job market.

The programme content and structure were also discussed as a favourable factor, offering opportunities to select elective courses quite freely. The students had all looked into the course descriptions carefully and wanted to avoid unnecessary compulsory elements since they knew what they were looking for and that “every credit costs”.

Students shared that the timing of the admission results was ideal, providing enough time to prepare for their move to Sweden. They appreciated that KTH gave them two months to accept their offer. The process was positive, with plenty of information and contact with KTH, and the communication was welcomed throughout the journey—it was informative without being overwhelming. The *Connect with a KTH Student* project was especially appreciated and played a key role in their decision to join KTH. The Goin’ app was useful for certain aspects, although many groups were inactive. Several students mentioned a specific Indian student ambassador who represented KTH in blogs and webinars, that they related to and took advice from. It was also important that KTH offered accommodation, especially in cases where parents influenced the decision.

Mexico

Most students from Mexico go to the US, Spain, Germany, Canada and France for their master’s studies. The inflow of Mexican students to Sweden has been very stable, at around 180-190 students per year, since the introduction of tuition fees¹².

According to the focus group meeting, there is no single identifiable factor explaining why the number of students from Mexico has increased this particular year. The focus group’s reasons for why Sweden and KTH have been perceived as attractive study destinations are similar to what is explained by performed survey, i.e. ranking, search engine visibility and previous exchange studies. The group was surprised to learn that there had been a substantial increase in the number of Mexican students. In general, Sweden is described as an affordable study destination, particularly in comparison to the UK and the US. Furthermore, as an example, one student had been admitted to DTU. Although DTU has tuition fees similar to KTH, he chose KTH and Stockholm because of the relatively lower living costs.

One factor mentioned by various students in the focus group is that the national scholarship programme managed by Conacyt is no longer available on a large scale. The students were speculating that Mexican students due to that change are more active and engaged in looking for study destinations and countries, which might implicate that they discover “new” universities such as KTH. Most students primarily chose KTH, rather than Sweden.

The survey shows that Mexican students in comparison to the general group, have a higher preference of considering Germany as a study destination. Neither the focus group nor the survey data indicates that our Mexican students consider USA as a study destination. The focus group students explain that even though US is still the “dream destination” for many fellow Mexican students, the ones that chose KTH prefer Europe. Approximately half of the students in the focus group seemed to have had little awareness of Sweden prior the application process. Google search and ranking lists of suitable options in Europe guided them to KTH. Once they learned more about Sweden and KTH as a study destination, they were convinced

¹² UKÄ data base, 2011-2022

that this was the best option for them. The survey data also shows that many Mexican students were admitted to other universities in Europe, but that KTH remained their preferred destination.

Indonesia

Indonesian students traditionally go to Australia, US, UK and the Netherlands. Sweden is still quite unknown as a study destination in Indonesia, even though it is perceived to offer good quality of education. Our students have been asked “Why Sweden?” when sharing where they were off to.

The students chose KTH for its strong global rankings, sustainability focus, relevant programmes, and affordable tuition. Indonesian students tend to have a greater focus on sustainability than the overall target group.

The scholarship organisation LPDP has started focusing on non-English speaking countries but as the students choose the university first and then apply for the scholarship, they meant that the scholarship did not directly affect their choice of university in the first stage. However, since it covers both tuition fee and living expenses it significantly increases the chances of following through and registering.

One of the positive aspects mentioned was that the KTH programmes are more applied than similar programmes in other countries and that there are good possibilities of choosing electives during the study period. The students also appreciated the service, especially guaranteed accommodation which was seen as a unique offer.

Effective communication through fairs, university visits, social media, and interaction with current KTH students influenced their decisions, with examples of specific meetings with KTH professors and students as decisive factors. Sweden’s safety, work visa policies, and support for families made it a favourable choice over destinations like the US or UK, despite the UK's one-year master's programmes being attractive to some. It was positive that the admission results came rather early.

5.3 Decision-making process

When analysing the focus groups and survey, a typical student decision-making process evolved:

1. **Searching for European Options:** Prospective students usually develop a preference for Europe over other regions early on, driven by personal values or lifestyle factors such as work-life balance, safety, language requirements, and openness to different cultures. When searching for options in Europe, students primarily turn to ranking lists and search engines, looking for universities and programmes in their sought field of study. KTH works actively with visibility in both these channels.
2. **Investigating KTH:** Students assess KTH based on the quality of education and programme content. They search for more information and compare alternatives by exploring the KTH website, particularly programme descriptions and course lists. Students value KTH's programme content and structure, highlighting aspects such as the applied approach and flexibility, which allows for elective courses tailored to individual preferences. After finding relevant information on kth.se, students reach out to KTH for more personalised input through official channels, including webinars, digital events, social media, emails, or interactions with current students. Personal networks are also used.
3. **Evaluating Return on Investment:** Value for money is a crucial factor in the decision-making, with students comparing tuition fees and living expenses against the quality or value of the offer. This assessment is based on ranking, programme content, student testimonials, and career options. Factors such as residence permits for job-seeking and future career prospects also play a vital role in evaluating different options. The majority of students aim for a future career in Sweden or Europe.
4. **Choosing KTH:** The final decision is typically made after admission. About 82% of students apply to and 65% are admitted to other universities, mainly top-ranked European institutions like TU Delft, Aalto, and TU Munich. Students consider all aspects of the offer, including return on investment, through multiple interactions with KTH's communication channels and other sources

6 Summary and conclusion

The significant increase in new students at KTH's master's programmes in autumn 2024 was partly driven by a rise in qualified applicants (+14%) and admitted students (+13%). However, the increase was primarily due to a higher conversion rate from admission to registration among fee-paying (non-European) students, from around 25-27% in previous years to 34% in 2024. The conversion rate for non-fee-paying (European) students remained the same as previous years, around 60%.

Among fee-paying students, KTH saw significant growth in self-funded students and LPDP scholarship holders. Joint programme students grew slightly in numbers but make up a smaller share than previous years. China accounts for the largest increase in numbers, while Indonesia, Mexico, and Portugal saw the largest percentage increases. The rise in Chinese students was mostly due to more students from non-partner universities. Their interest to study abroad seems to have grown during the pandemic, with KTH being increasingly attractive due to its ranking, affordability and comparatively open migration policies.

All schools experienced growth in international student numbers, though to varying degrees. The schools were generally positive to the development, despite some challenges.

KTH's rise in popularity was not mirrored nationally, where numbers of qualified applicants dropped by 8% (KTH +14%). Official national statistics for registered students 2024 are not yet available.

Key factors contributing to KTH's increased appeal among international students include:

- Positive development in international rankings (top 100 in both QS and THE), which boosted KTH's visibility. Ranking plays a vital role both in finding and ultimately choosing university.
- Affordability due to the development of the Swedish currency and inflation in other popular study destinations. KTH is perceived as good value for money.
- The impact of new or planned barriers or caps for international students in countries like Canada, Australia, and the Netherlands, which may have shifted students towards Sweden.
- Sweden's relatively open migration policies, including residence permits for studies, job-seeking for a year after graduation, and work.
- Effective communication with long-term efforts to build visibility and reach out to prospective students have paid off. The website consistently ranks highly in terms of usefulness, and personal interactions with students and staff make a significant difference. Students often refer to specific examples of information or interactions with KTH as pivotal in their decision-making. Finally, guaranteed accommodation plays a vital role to students and parents who value a safe offer.

A typical decision-making process often involves a preference for Europe from early on, based on personal values or lifestyle factors. When looking for options, students turn to ranking lists and search engines. Students explore the website for programme and course details and compare alternatives. KTH is valued for its applied approach and flexibility. The final decision is generally made after admission, since 82% applied to other universities, mainly top-ranked European institutions. The students consider all aspects of the offer, including return on investment, based on multiple interactions with KTH and other sources.

In conclusion, fee-paying students' decision-making is largely based on an evaluation of return on investment, where crucial factors such as ranking, affordability, and opportunities for job-seeking and future careers in Sweden, have developed in our favour over the last few years. Additionally, KTH has successfully built visibility and reached out to the target group in an effective manner and the

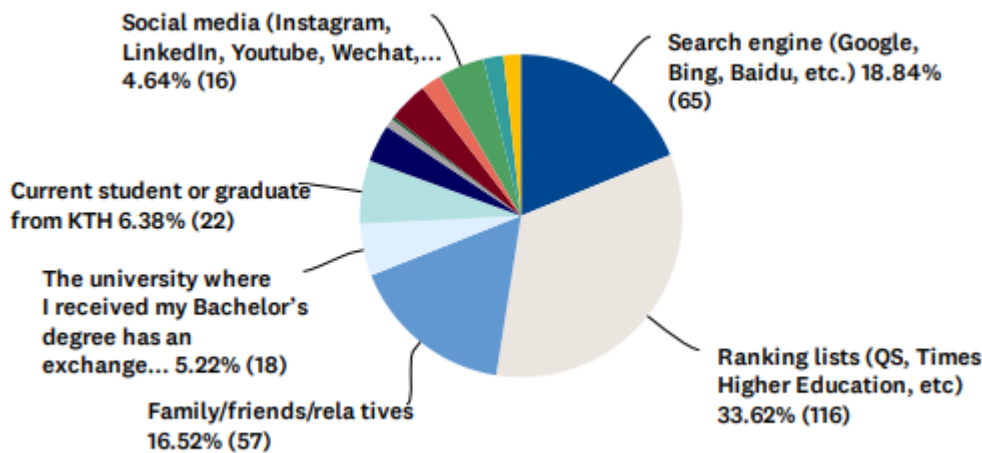
communication and support to admitted students have further strengthened the offer. Added to this are more specific factors, such as positive outcomes of collaborations with scholarship organisations.

Appendix A: Survey Results

This appendix provides the detailed results of a survey to new fee-paying master's students at KTH in November 2024, aiming to understand their motivations, decision-making processes, and experiences. The survey resulted in 838 successful send-outs and 344 answers, which gave a 41 % response rate.

Q1 How did you first find out about KTH?

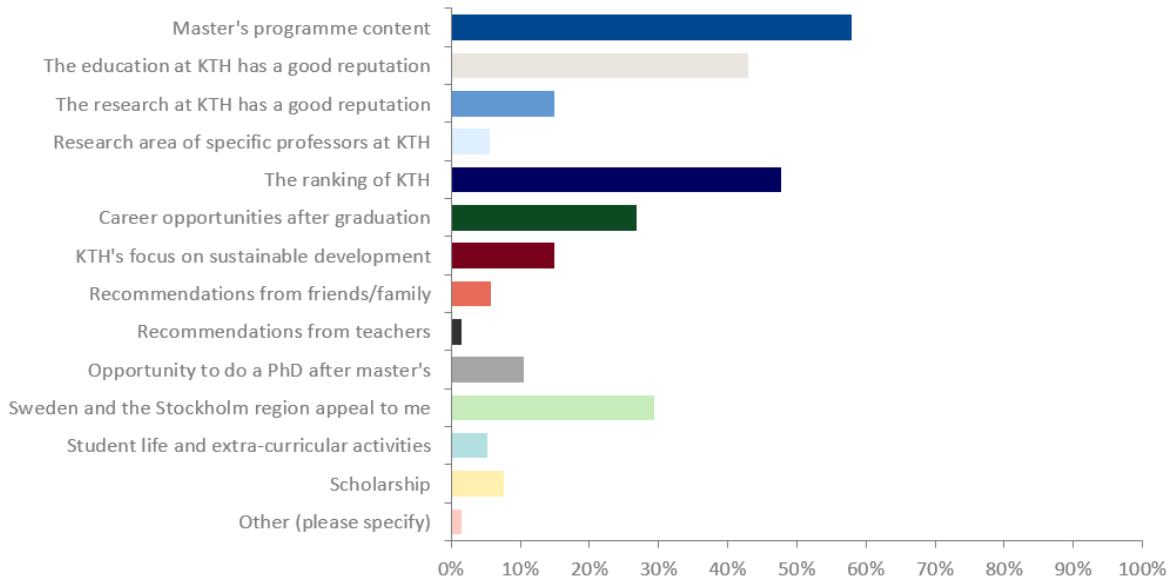
Answered: 344 Skipped: 0



ANSWER CHOICES	RESPONSES	
Search engine (Google, Bing, Baidu, etc.)	18.84%	65
Ranking lists (QS, Times Higher Education, etc)	33.62%	116
Family/friends/relatives	16.52%	57
The university where I received my Bachelor's degree has an exchange agreement with KTH	5.22%	18
Current student or graduate from KTH	6.38%	22
Teacher/advisor at university where I received my Bachelor's degree	3.77%	13
Meeting KTH at a fair or at home university	0.87%	3
Education agents	0.29%	1
Education portals (for example: Masterstudies.com, Educations.com, Topuniversities, etc.)	4.06%	14
Universityadmissions.se	2.03%	7
Social media (Instagram, LinkedIn, Youtube, Wechat, Xiaohongshu, etc)	4.64%	16
Don't remember	2.03%	7
Other (please specify)	1.74%	6
TOTAL		345

Q2 What were your main reasons for choosing KTH? (Choose a maximum of 3)

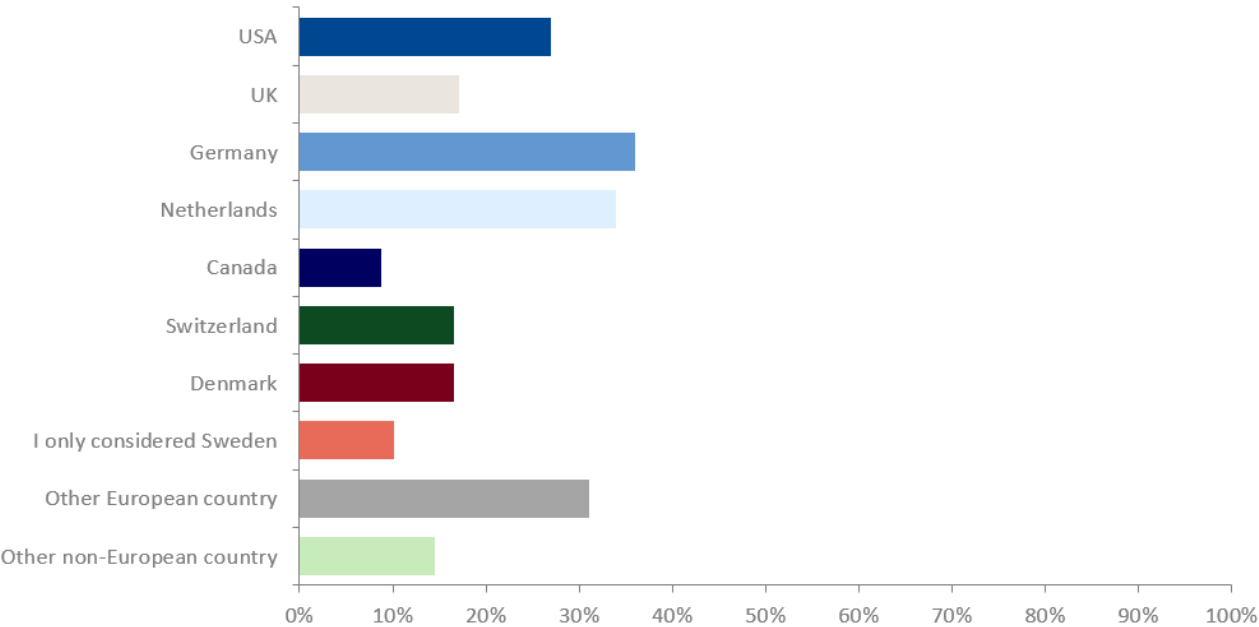
Answered: 344 Skipped: 0



ANSWER CHOICES	RESPONSES	
Master's programme content	57.97%	200
The education at KTH has a good reputation	43.19%	149
The research at KTH has a good reputation	14.78%	51
Research area of specific professors at KTH	5.51%	19
The ranking of KTH	47.54%	164
Career opportunities after graduation	26.67%	92
KTH's focus on sustainable development	14.78%	51
Recommendations from friends/family	5.80%	20
Recommendations from teachers	1.45%	5
Opportunity to do a PhD after master's	10.43%	36
Sweden and the Stockholm region appeal to me	29.57%	102
Student life and extra-curricular activities	5.22%	18
Scholarship	7.54%	26
Other (please specify)	1.45%	5
Total Respondents: 345		

Q3 Which other countries did you consider studying in apart from Sweden?

Answered: 344 Skipped: 0

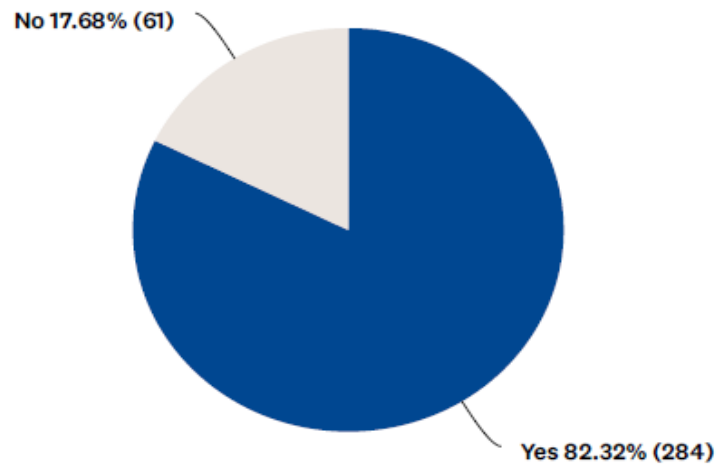


ANSWER CHOICES	RESPONSES	
USA	27.03%	93
UK	17.15%	59
Germany	36.05%	124
Netherlands	34.01%	117
Canada	8.72%	30
Switzerland	16.57%	57
Denmark	16.57%	57
I only considered Sweden	10.17%	35
Other European country	31.10%	107

Q4 Did you apply to other universities?

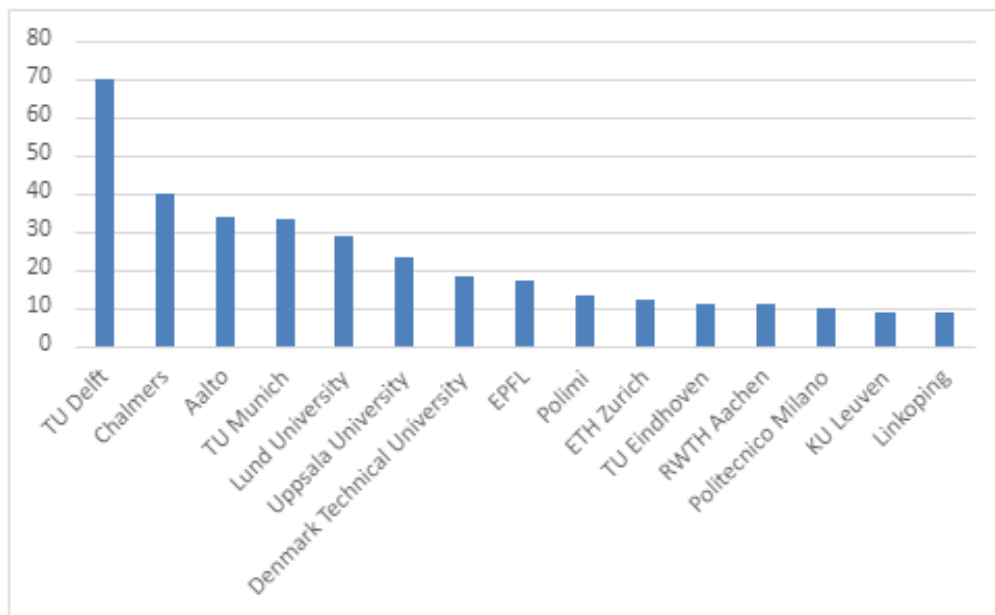
Answered: 344

Skipped: 0



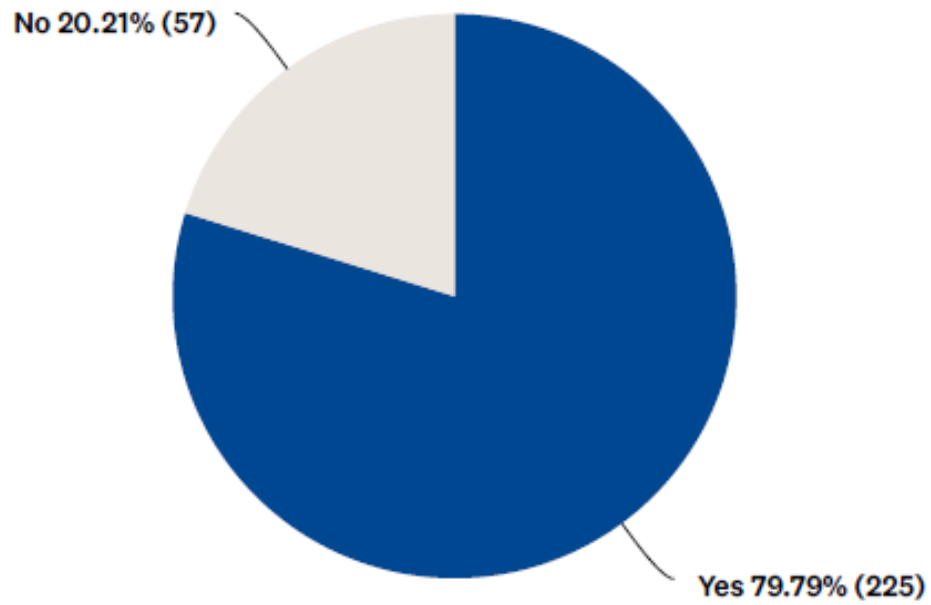
Q5 Which other universities did you consider apart from KTH?

Answered: 272 Skipped: 72

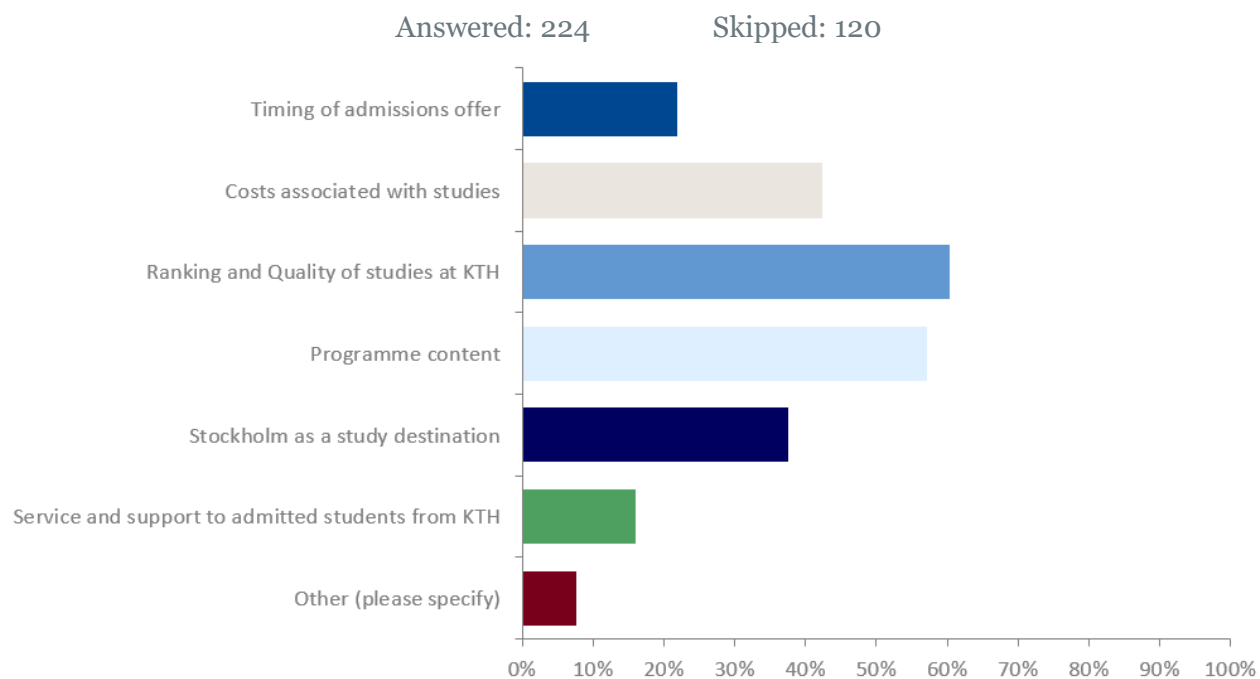


Q6 Were you admitted to any other university?

Answered: 281Skipped: 63



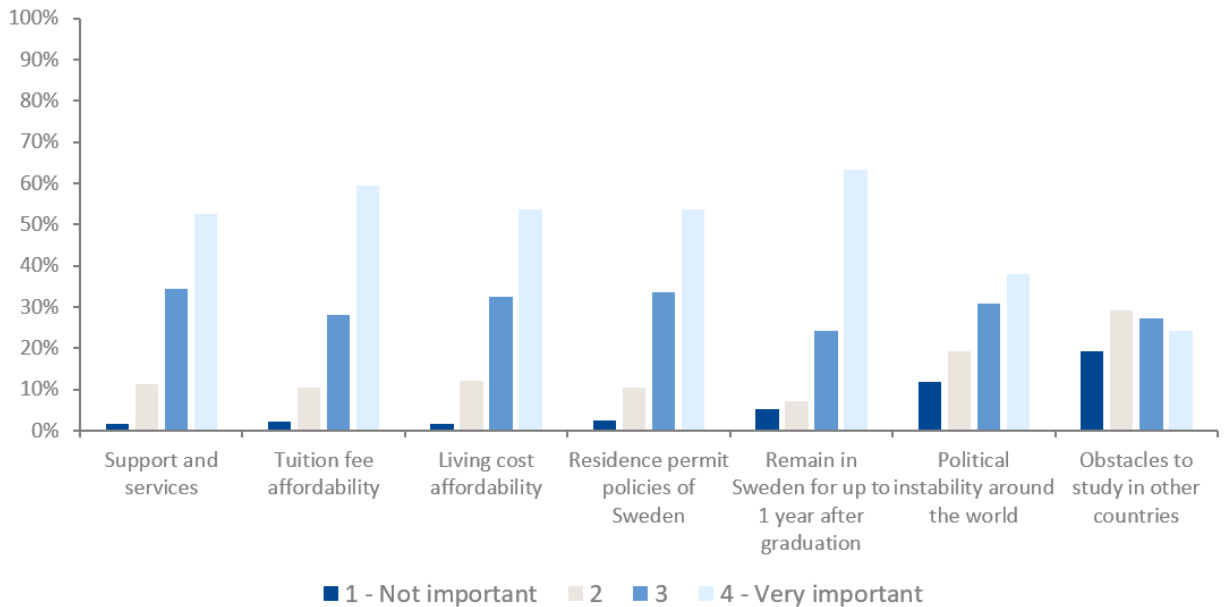
Q7 Why did you choose KTH over the other universities?



ANSWER CHOICES	RESPONSES	
Timing of admissions offer	21.88%	49
Costs associated with studies	42.41%	95
Ranking and Quality of studies at KTH	60.27%	135
Programme content	57.14%	128
Stockholm as a study destination	37.50%	84
Service and support to admitted students from KTH	16.07%	36
Other (please specify)	7.59%	17

Q8 After being admitted to KTH, how important were these factors inchoosing to start your studies?

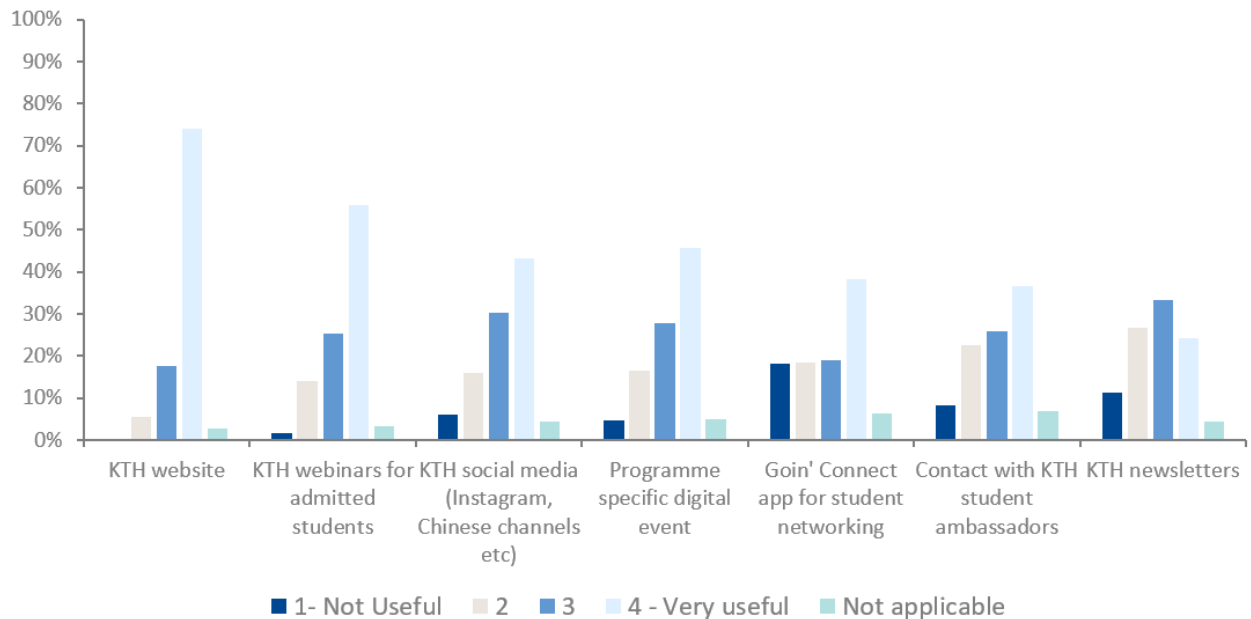
Answered: 337 Skipped: 8



	1 - NOT IMPORTANT	2	3	4 - VERY IMPORTANT	TOTAL	WEIGHTED AVERAGE
Support and services	1.78% 6	11.28% 38	34.42% 116	52.52% 177	337	3.38
Tuition fee affordability	2.08% 7	10.39% 35	28.19% 95	59.35% 200	337	3.45
Living cost affordability	1.78% 6	12.17% 41	32.34% 109	53.71% 181	337	3.38
Residence permit policies of Sweden	2.37% 8	10.39% 35	33.53% 113	53.71% 181	337	3.39
Remain in Sweden for up to 1 year after graduation	5.34% 18	7.12% 24	24.33% 82	63.20% 213	337	3.45
Political instability around the world	11.87% 40	19.29% 65	30.86% 104	37.98% 128	337	2.95
Obstacles to study in other countries	19.29% 65	29.08% 98	27.30% 92	24.33% 82	337	2.57

Q9 How useful were the following communication channels after your admission to KTH?

Answered: 337 Skipped: 8

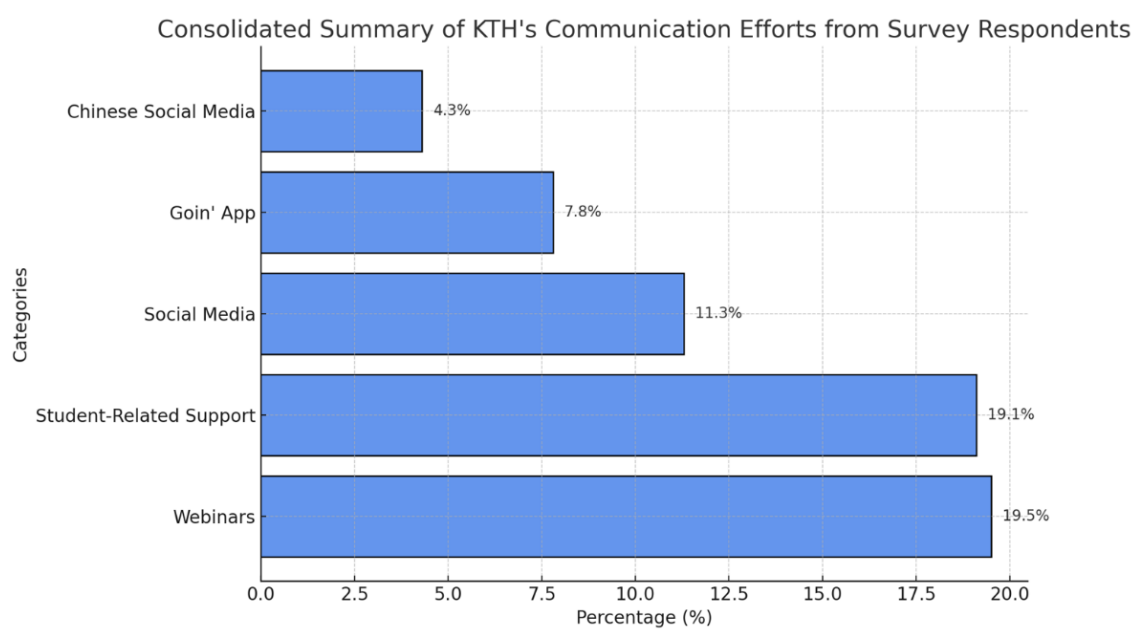


	1- NOT USEFUL	2	3	4 - VERY USEFUL	NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
KTH website	0.30% 1	5.64% 19	17.51% 59	73.89% 249	2.67% 9	337	3.70
KTH webinars for admitted students	1.78% 6	13.95% 47	25.22% 85	55.79% 188	3.26% 11	337	3.40
KTH social media (Instagram, Chinese channels etc)	5.93% 20	16.02% 54	30.27% 102	43.32% 146	4.45% 15	337	3.16
Programme specific digital event	4.75% 16	16.62% 56	27.89% 94	45.70% 154	5.04% 17	337	3.21
Goin' Connect app for student networking	18.10% 61	18.40% 62	18.99% 64	38.28% 129	6.23% 21	337	2.83
Contact with KTH student ambassadors	8.31% 28	22.55% 76	25.82% 87	36.50% 123	6.82% 23	337	2.97
KTH newsletters	11.28% 38	26.71% 90	33.23% 112	24.33% 82	4.45% 15	337	2.74

Q10 Can you mention any of KTH's communication efforts that have been particularly useful? (Open answer)

Answered: 259

Skipped: 85



Examples of open answers in the student survey

“The overall website is already very informative and useful. But a very helpful one was the chance to connect with a student who's an ambassador not long after my admittance”

“Great prompt communication through emails and website”

“Goin' was surprisingly helpful, the KTH website is great, and I really appreciated the webinars.”

“KTH website has been most resourceful. Webinars and offline events were rather confusing with people giving often contradicting information, although they were useful in a way that it gave us some idea what to expect. Nevertheless, people have been friendly and warm to address any concerns.”

“The best platform was the Goin app where I met people from my own course before even going to the classroom.”

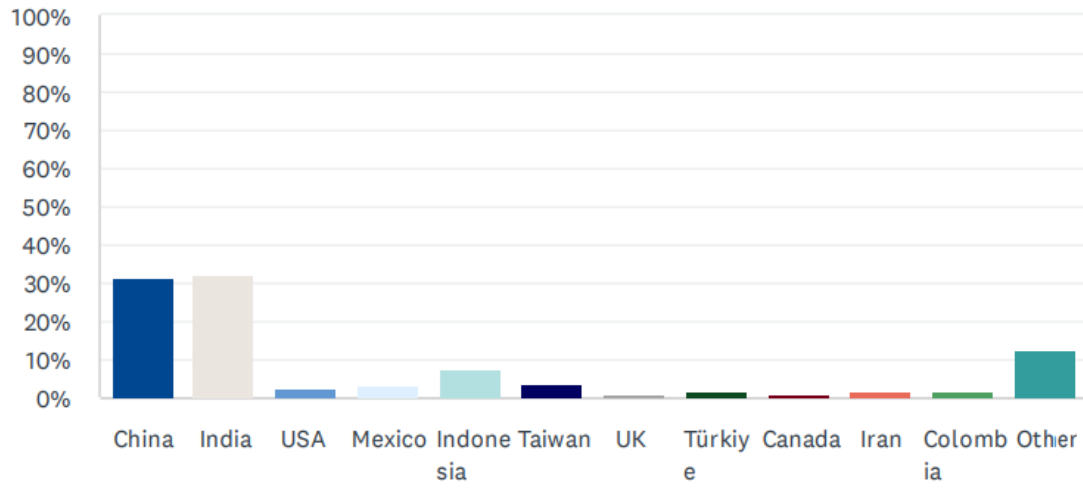
“I personally loved the Goin app. If it gets some more minor functions, it has real potential to be the most useful resource for a new student.”

“I asked for help to connect with seniors in KTH Wechat account, and they reply very in time, and got help a lot from the senior” “

Goin was the first thing that helped to connect the classmates from same course and course ambassadors also played a vital role in answering the questions.

Q12 In which country did you receive your Bachelor's degree?

Answered: 332 Skipped: 13



ANSWER CHOICES	RESPONSES	
China	31.33%	104
India	32.23%	107
USA	2.41%	8
Mexico	3.01%	10
Indonesia	7.23%	24
Taiwan	3.92%	13
UK	0.90%	3
Türkiye	1.81%	6
Canada	0.90%	3
Iran	1.81%	6
Colombia	1.81%	6
Other	12.65%	42
TOTAL		332

Appendix B, statistics new registered master's students

New registered master's students per school 2024

Skola	Program	Antal	Antal kvinnor	Antal män	Betalande	Ej betalande
⊕	ABE	348	176	172	100	248
⊕	CBH	203	111	92	97	106
⊕	EECS	681	213	468	411	270
⊕	ITM	355	118	237	194	161
⊕	SCI	265	69	196	115	150
	Total	1852	687	1165	917	935

New registered master's students ht23

Skola	Program	Antal	Antal kvinnor	Antal män	Betalande	Ej betalande
⊕	ABE	312	159	153	87	225
⊕	CBH	157	68	89	61	96
⊕	EECS	557	165	392	305	252
⊕	ITM	269	83	186	137	132
⊕	SCI	165	37	128	66	99
	Total	1459	511	948	656	803

New registered master's students ht22

Skola	Program	Antal	Antal kvinnor	Antal män	Betalande	Ej betalande
⊕	ABE	284	155	129	93	191
⊕	CBH	197	110	87	75	122
⊕	EECS	545	146	399	316	229
⊕	ITM	204	53	151	104	100
⊕	SCI	134	28	106	42	92
	Total	1364	492	872	630	734

Programme-specific statistics on new students can be found on [Nybörjare | KTH Intranät](#)
 Statistics regarding new registered international students on master's programmes, including background country and payment category, can be found on [Microsoft Power BI](#)

Appendix C, Master student analysis, China 2024

Report by Prof:Urban Westergren, Regional Director for China and India

Document Information

Type of document	Analysis report
Version	Issue 1
Version date	2024-10-13
Distribution	VP international relations
Responsible author	Urban Westergren, IRO/SCI
File name	Master student analysis China 2024 issue 1
Security level	Confidential

Document history

Version		Datum	Comments, status
Issue 1		2024-10-13	First edition finalised

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1 Background, summary and propsd actions

1.1 Background

The registered number of students from China mainland increased substantially from 2023 to 2024. After several years of staying approximately in the range 200-250, the number in 2024 suddenly exceeded 400. This was not expected based on the relatively small increase in admitted students in March 2024, and the limited increase in applications within the partnerships with high-ranked Chinese universities.

1.2 Summary

As the following analysis will show, the main part of the increase comes from low-ranked Chinese universities, with which in most cases KTH has had no contact over the years. The students are below divided into three groups according to the China mainland part of the “Shanghai ranking” ARWU: Best Chinese University Ranking, BCUR. Reference:

<https://www.shanghairanking.com/rankings/bcur/2024>

Group 1: Top 15 universities including close collaboration partners such as Zhejiang University and Shanghai Jiao tong University.

Group 2: Top 16-50 universities including other partners such as Beijing Jiaotong University

Group 3: Lower ranked than top 50

The first group contains most of the universities with which KTH has various types of agreements such as student exchange, research collaborations, double-degree master programs and 3+2 agreements. Changes from 2023 to 2024 are as follows:

- **Group 1:** +25 students (from 137 to 162) or **+18%**
- **Group 2:** +54 students (from 60 to 114) or **+90%**
- **Group 3:** +70 students (from 64 to 134) or **+109%**

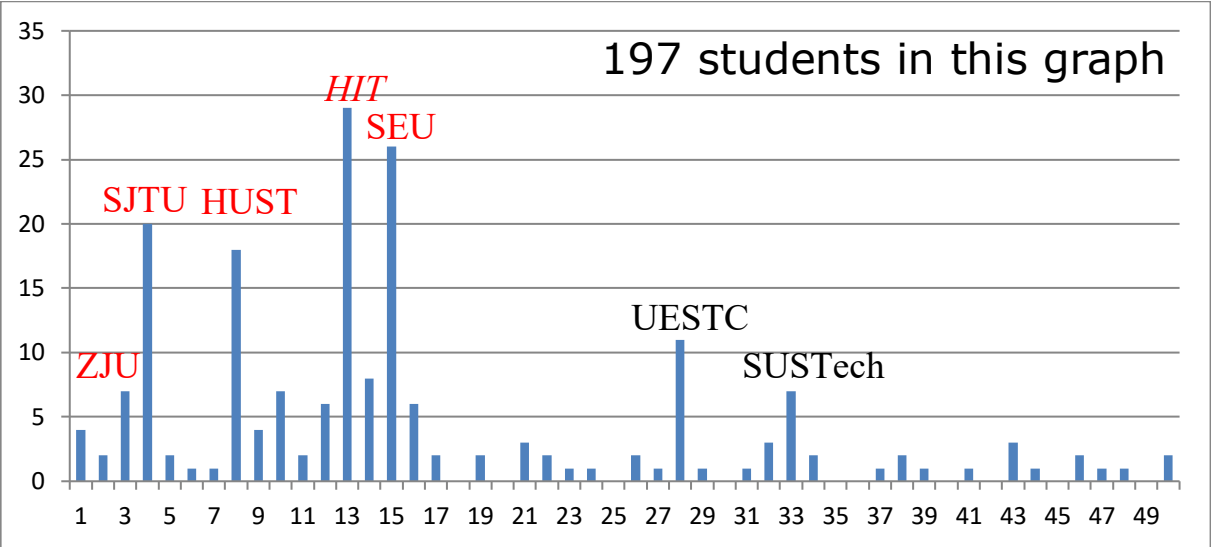
1.3 Proposed actions

- If it is desired to limit the fraction of students coming from low-ranked universities compared to high-ranked universities, it appears no longer sufficient to try to increase the numbers from the latter to outcompete students from the former.
- If it is desired to limit the total number of students from China mainland, a cancellation of the active and targeted recruitment efforts (such as 3+2) may reduce the total number somewhat but at the expense of quality.
- Limiting general recruitment efforts may have a reducing effect on the numbers from low-ranked universities but this is difficult to control.
- Reviewing the way merit values are assigned to applications from students from low-ranked universities may help in reducing total number in a more controllable way while not reducing quality.

2 Student statistics

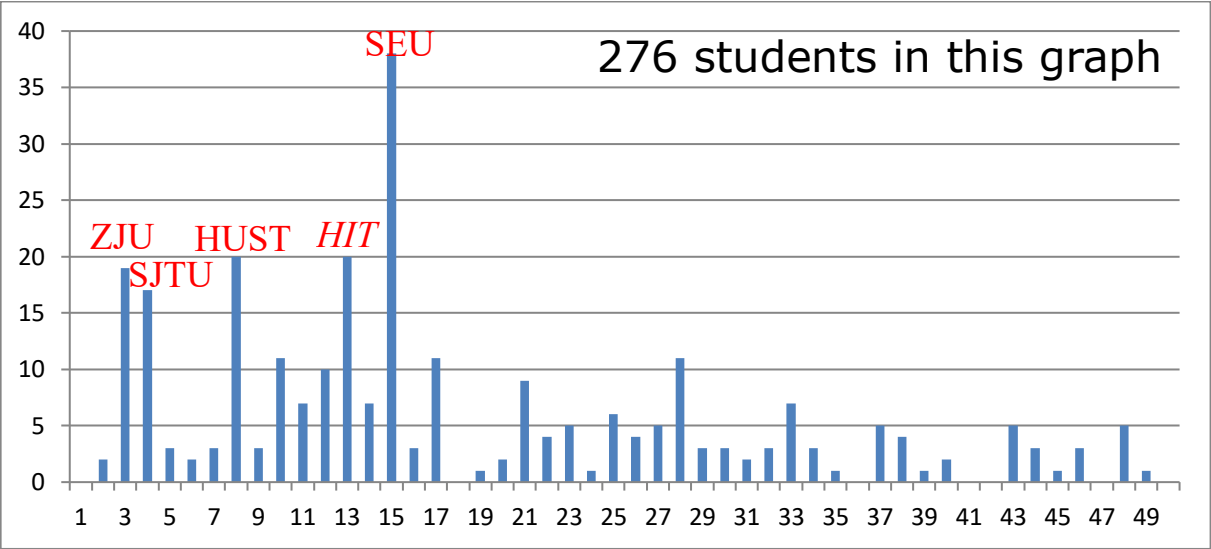
2.1 Arriving students from China mainland in 2023

Arriving master students from China in 2023 vs ranking, 75% from top 50 and 52% from top 15 according to Best Chinese University Ranking from 1 (Tsinghua) to 50 (BCUR 2023, mainland China part of ARWU). All 3+2 agreements in 2023 in red: ZJU, SJTU+UM-SJTU-JI, HUST, HIT, SEU, BJTU. 52% from top 15.



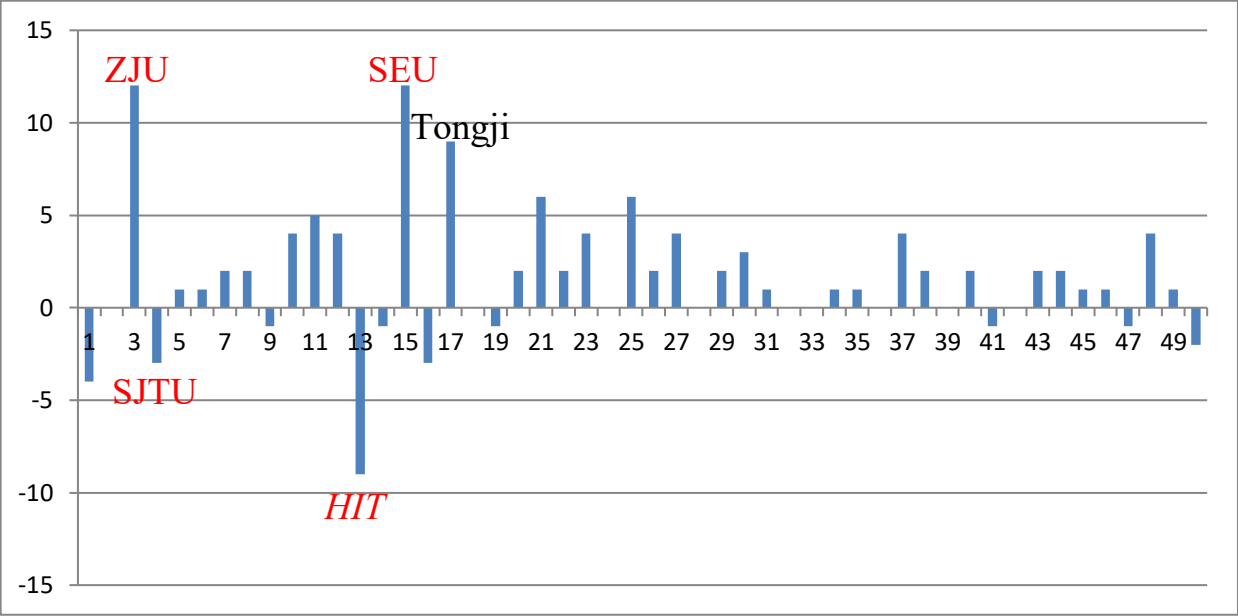
2.2 Arriving students from China mainland in 2024

Arriving master students from China in 2024 vs ranking, 67% from top 50, and 40% from top 15 according to BCUR 2023. All 3+2 agreements in 2024 in red: ZJU, SJTU+UM-SJTU-JI, HUST, HIT, SEU, BJTU. 40% from top 15. EIT is included



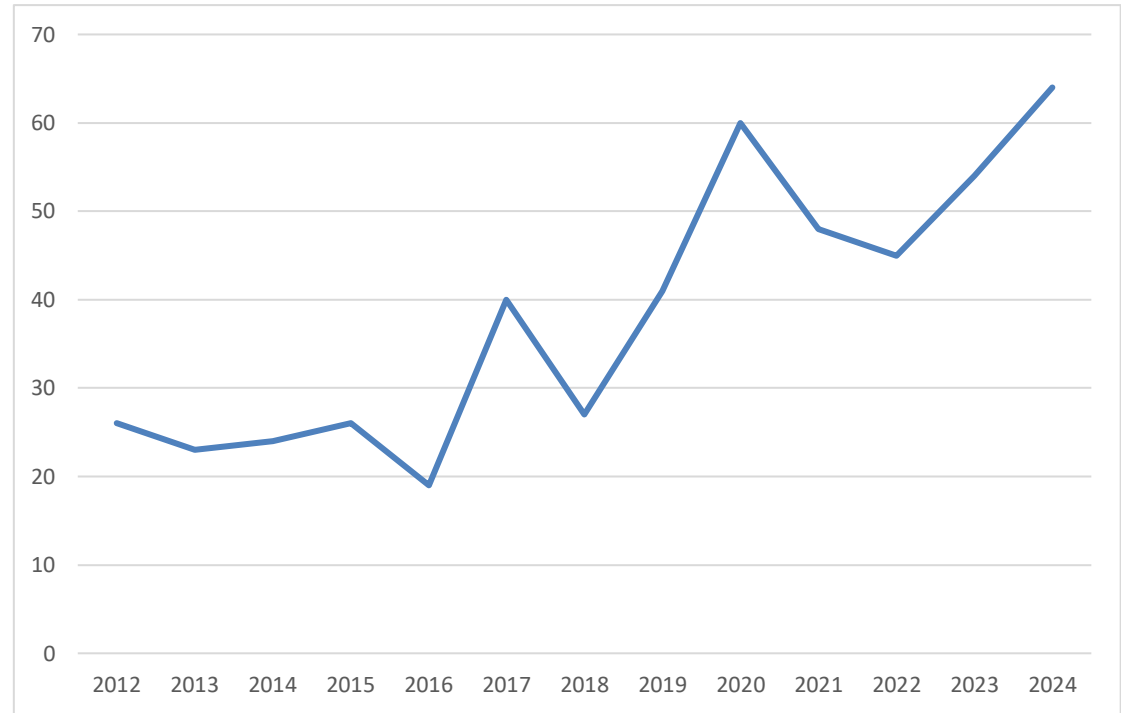
2.3 Changes from 2023 to 2024 in students of BCUR top 50 ranked

Change in numbers from top 15: +25 students (from 137 to 162) or +18%
Change in numbers from top 16-50: +54 students (from 60 to 114) or +90%
Change in numbers from lower than 50: +70 students (from 64 to 134) or +109%



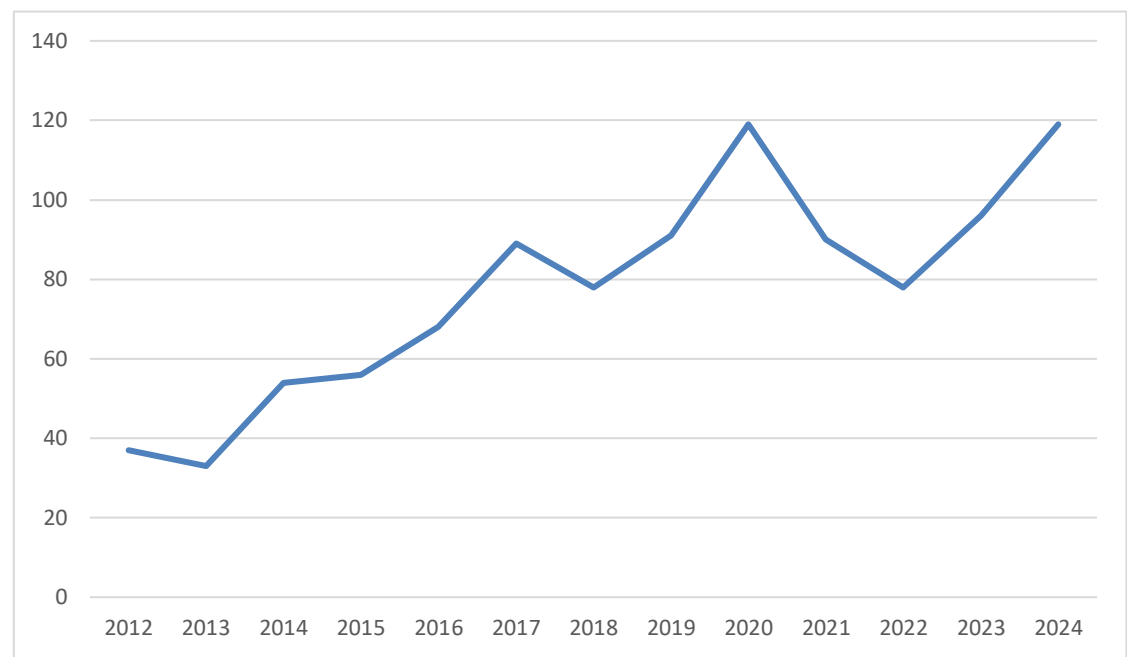
2.4 Changes from 2012 to 2024 in the number of 3+2 students

Total number of 3+2 students changed from 2023 to 2024 by +18.5%. The change from the top value in 2020 was +7%.



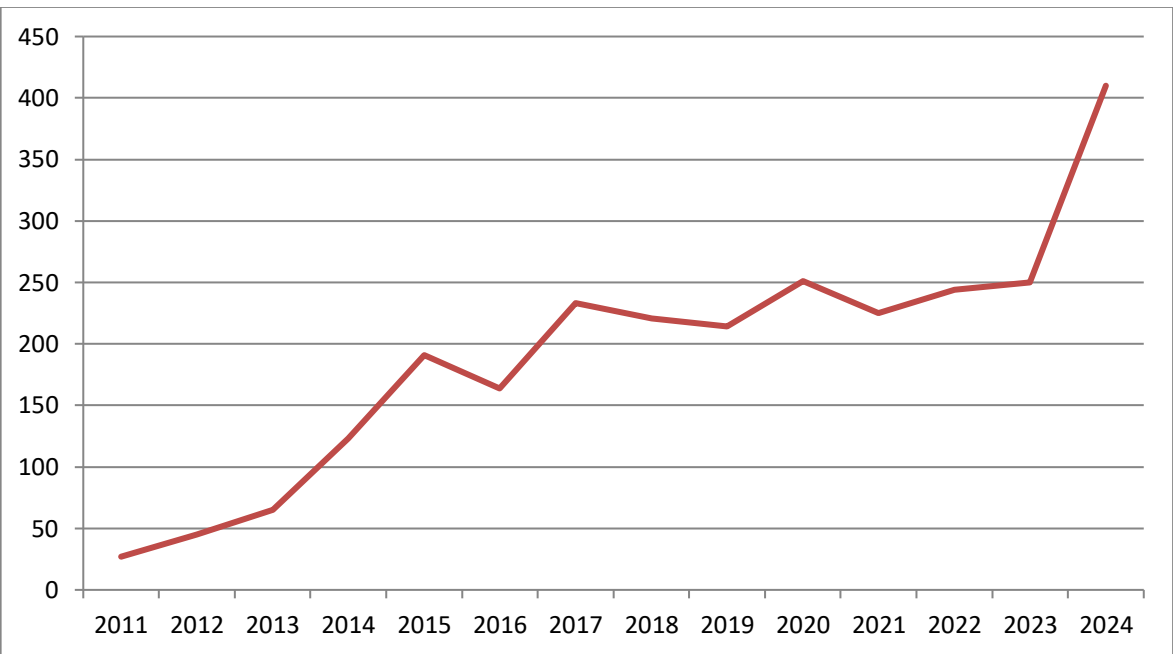
2.5 Changes from 2012 to 2024 in the number from 3+2 partners

Total number of students from universities with which KTH has 3+2 agreements changed from 2023 to 2024 by +24%. The change from the top value in 2020 was +/-0%.

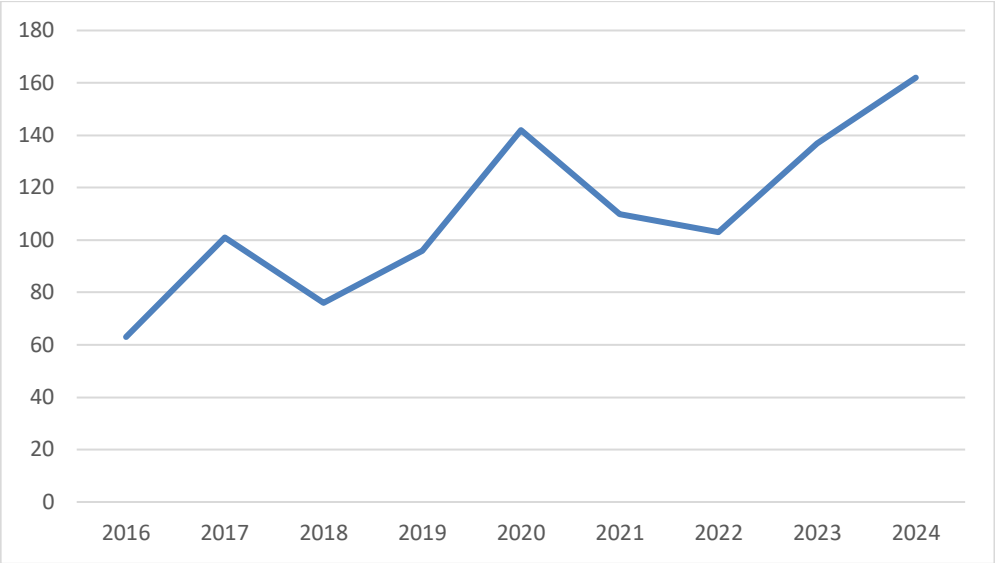


Students from 3+2 partner universities

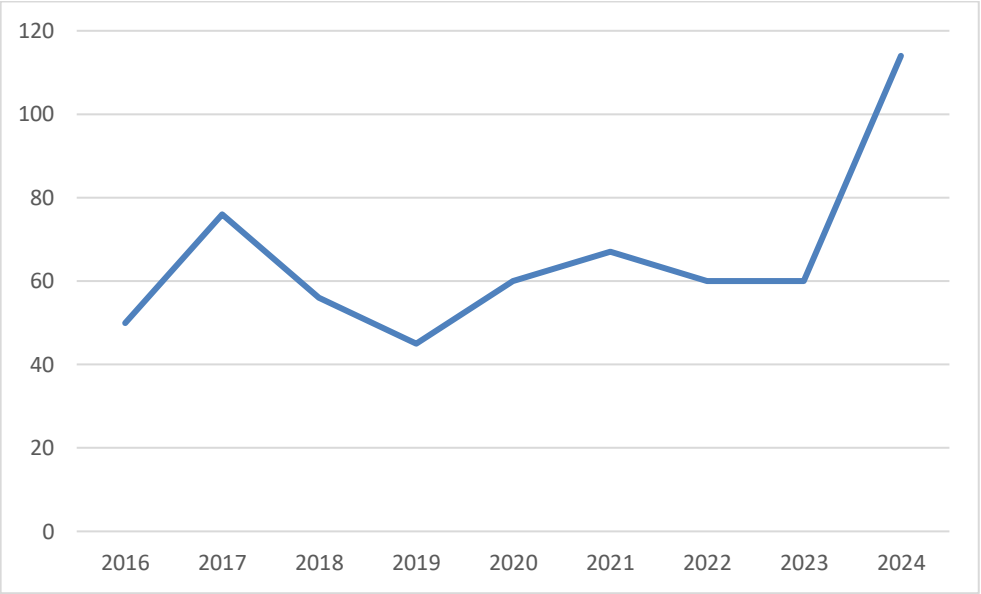
2.6 Total number of students from China mainland 2011-2024



2.7 Students from top 15 ranked universities 2012-2024



2.8 Students from top 16-50 ranked universities 2012-2024



2.9 Students from lower than top 50 ranked universities 2016-2024

