MARKET BRIEFING · 2026 ADMISSIONS

PTS Insights 2026

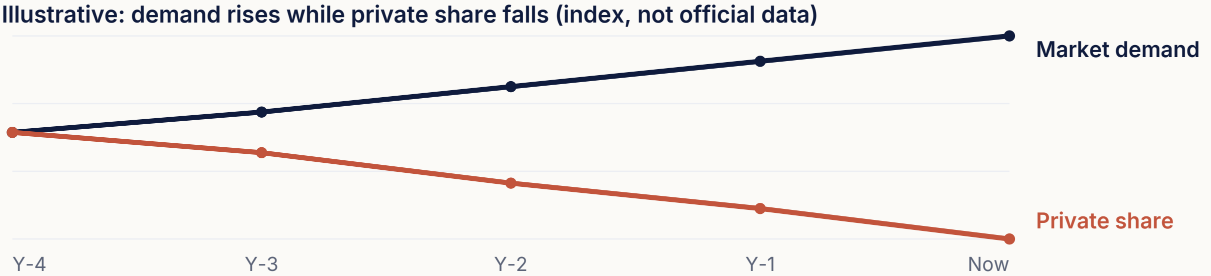
The survival economics of Indonesian private universities — why institutions that know their numbers grow, and the ones that don't disappear.

1. A growing global market, a contracting private sector

Globally, higher education has never been bigger. Worldwide enrolment hit a record 269 million students in 2024 — more than double the figure of two decades ago.[1] Indonesian demand is rising too: the gross enrolment ratio for higher education continued to climb through 2025.[2]

That growth is not shared evenly. The market is not shrinking — the private sector's share of a growing market is. The expansion of state universities' independent admission tracks pulls in students who used to form the private applicant base, and APTISI has repeatedly warned about private campuses at risk of closing under admissions pressure.[3]

Illustrative: demand rises while private share falls (index, not official data)



Directional illustration, not measured data. Official per-institution data: Higher Education Statistics 2025.

Three pressures hitting margins at once

— Applicants moving to state universities via widening independent tracks.

— Accreditation, compliance and operating costs rising faster than tuition.

— Large seasonal marketing spend with no measure of cost per enrolled student.

The institutions that survive are not the ones with the biggest budgets. They are the ones that know exactly what one enrolled student costs them — and can therefore decide where the next rupiah goes.

Three questions this briefing answers

01 What does one enrolled student cost you — not one lead?

02 Which channels actually fund your intake, and which are only busy?

03 How do you build an admissions budget you can defend to the board?

2. You cannot invest your way out without knowing your economics

In a cash-constrained environment, marketing spend stops being a budget line and becomes a bet — one you cannot size unless you know the price of a single enrolled student.

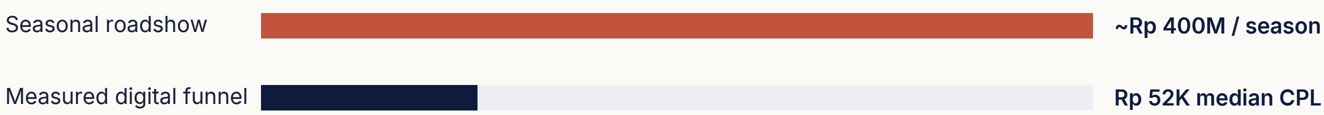
> **The spiral we see most often**
>
> Enrolment falls → marketing is cut → enrolment falls further → the next cut is deeper.
> The way out is not another dashboard. It is one number: which spend actually ends in an enrolled student.

The number that decides everything: cost per enrollment

> **CPE = Total marketing cost ÷ Students enrolled**
>
> Cost per enrollment — not CPL, not impressions, not reach.

CPL, reach and impressions are the wrong denominators for a cash-constrained institution: all three can improve while enrolment stays flat. Only CPE connects directly to revenue — multiply it by your intake target and you have a budget you can defend to the foundation board.

Our portfolio data: the same money, very different cost per enrolled student



Range across the 40+ clients we have served. OurBeasiswa internal data, not an industry benchmark.

In the roadshow programmes we audited, roughly 60% of collected contact data was invalid — wrong numbers, dead lines, or people who were never prospective students. The cost is incurred in full; what disappears is the denominator. A digital funnel with contact verification makes every rupiah traceable to a name that actually enrolled.

> **What changes once you know your CPE**
>
> — Budgeting stops being a matter of taste; it becomes intake × CPE.
>
> — Expensive channels surface mid-season, not after the money is gone.
>
> — Agencies can be held to enrolled students, not impression reports.

3. What to do Monday morning

Three steps, all using numbers you already have today.

01 Calculate last season's CPE

Add every marketing cost from one admissions season — agency, ads, roadshows, print, team incentives. Divide by the number of students who actually completed re-registration, not the number who applied.

02 Break it down by channel

Run the same calculation per channel. The channel with the highest CPE is almost always the one that is hardest to question internally — start there.

03 Lock one KPI for next season

Set a CPE target, not a leads target. Then measure every spending decision against it throughout the season, not at the end of it.

Rp 52K
median CPL across
our digital funnels

~60%
of roadshow contact
data found invalid

40+
institutions
we have served

"The KPI is written into the contract. Not CPL, not impressions — enrolled students."

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Calculate your own CPE: ourbeasiswa.com/kalkulator-cpe

Sources

1. UNESCO, Higher Education Global Trends Report (2026) — global higher education enrolment reached 269 million in 2024, more than double the figure two decades earlier.

2. Statistics Indonesia (BPS) — Gross Enrolment Ratio for higher education, BPS statistical tables; 2025 trend.

3. Kemdiktisaintek, Higher Education Statistics 2025 (data.kemdiktisaintek.go.id) for institution, new-student and enrolled-student counts; public APTISI statements on private-campus admissions pressure following the expansion of state universities' independent admission tracks, as reported by national media, 2025–2026.

4. Rp 52K median CPL, ~Rp 400M roadshow spend per season, ~60% invalid contact data and 40+ institutions are OurBeasiswa internal portfolio figures — not industry benchmarks.