

Webinar

TURNING THE TIDE:

Future-proof International
Recruitment Strategies for
U.S. Higher Education

16 MAY 2018 | 14:00 - 15:00 ET



530 registrations for the webinar

Turning the Tide: Future-proof International Recruitment Strategies
for U.S. Higher Education



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Studyportals at a glance

Our mission: Empowering the world to choose education



9 Portals



29 million unique users (2017)



370,000 international student enrolments (2017)



3,050 participating institutions



150,000 programmes



190+ employees / 35 nationalities

Boston | Bucharest | Chicago | Colombo | Eindhoven (HQ) | Manchester | Melbourne | San Francisco | Stockholm

Introduction

American higher education is entering a new era of intensified competition. For the first time in more than a decade, new international student enrolment at U.S. universities and colleges has declined. A variety of megatrends indicate that the next decade is likely to become even more competitive and disruptive for recruiting international students.

Despite the challenges, American higher education institutions have a significant opportunity and capacity to grow international student enrolment. International students comprise of only 5% in the total tertiary enrolment in the U.S. as compared to 18% for the U.K., 15% for Australia, 11% for Canada (OECD, 2017).

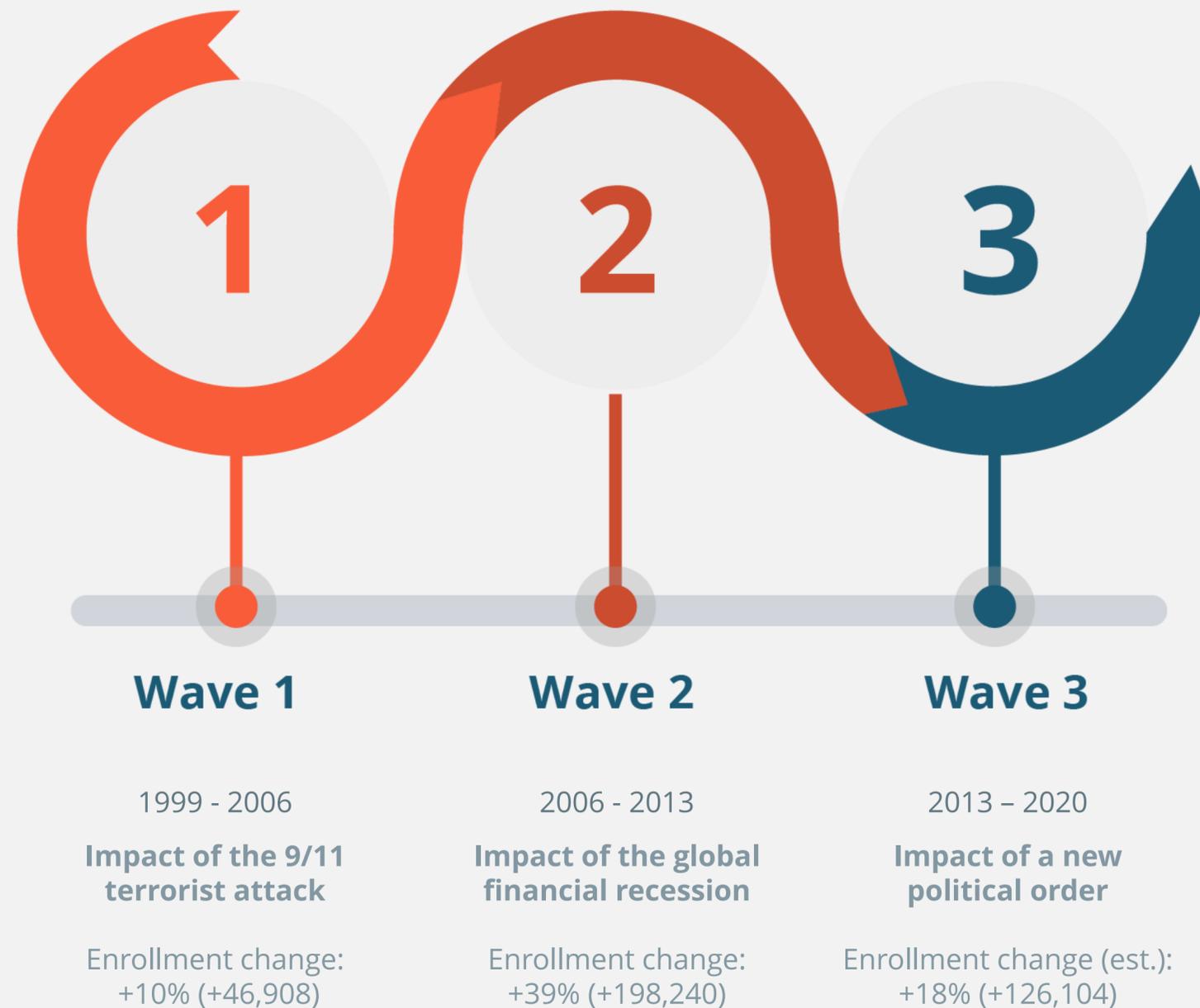
During an interactive discussion hosted by Studyportals, an expert panel of university leaders discussed how U.S. higher education institutions can maximize the opportunities and overcome the challenges of growing and diversifying international enrolment.

Rahul Choudaha, Ph.D.

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The three waves of international student mobility



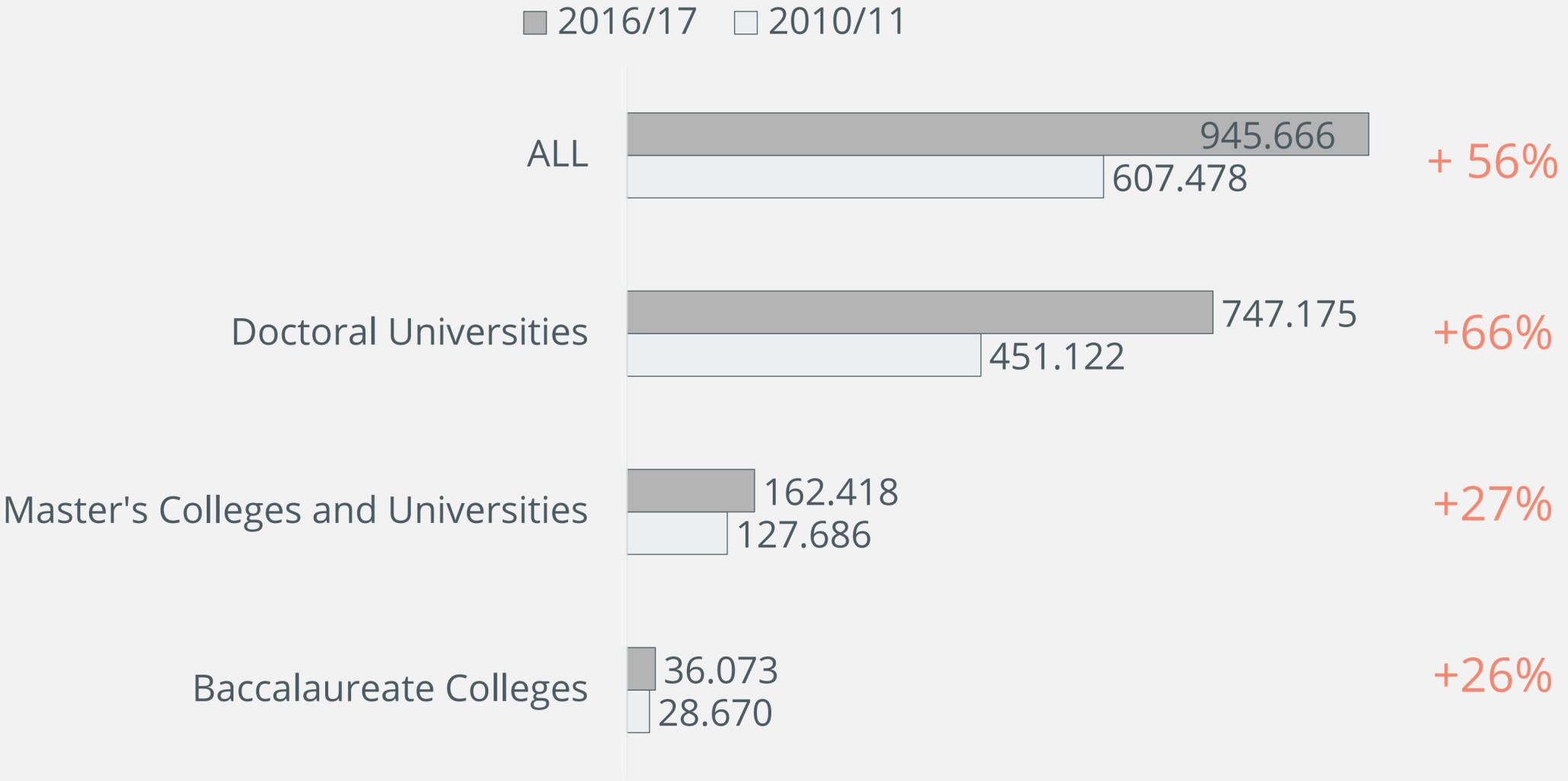
Choudaha, R. (2018). *A Third Wave of International Student Mobility*, Center for Studies in Higher Education, UC Berkeley.
Excludes students on Optional Practical Training and in nondegree programs. Estimated based on same as growth between 2013/14 and 2016/17.

Financial loss will shake-up some institutions

	Fall 2017	Fall 2016	Absolute Change	Percent Change	Est. Financial Change (\$ millions) *
Undergraduate	440,720	450,850	-10,130	-2.20%	(\$253)
Graduate	367,920	389,310	-21,390	-5.50%	(\$535)
Total	808,640	840,160	-31,520	-7.70%	(\$788)

Choudaha, R. (2018). *A Third Wave of International Student Mobility*. Center for Studies in Higher Education, UC Berkeley.
 *Financial contribution based on annual tuition and fees of US\$ 25,000. Excludes students on Optional Practical Training (OPT).
 Does not factor effect of tuition waivers/discounts.

Doctoral Research Universities experienced higher growth than the others



Choudaha, R. (2018). A Third Wave of International Student Mobility, Center for Studies in Higher Education, UC Berkeley. Includes students on Optional Practical Training (OPT).

Universities located in some states experienced higher growth than the others

For 115 R1: Doctoral Universities: Highest Research Activity
(% Change between 2010-16)

- California +108%
- New York +55%
- Texas +41%
- Massachusetts +44%
- Pennsylvania +57%

Universities located in some states increased tuition and fees at a faster rate than others

For 115 R1: Doctoral Universities: Highest Research Activity (% Change in tuition and fees between 2010-16)

- California +20%
- New York +44%
- Texas +31%
- Massachusetts +27%
- Pennsylvania +23%

Pressure points beyond political climate: Cost and brand awareness

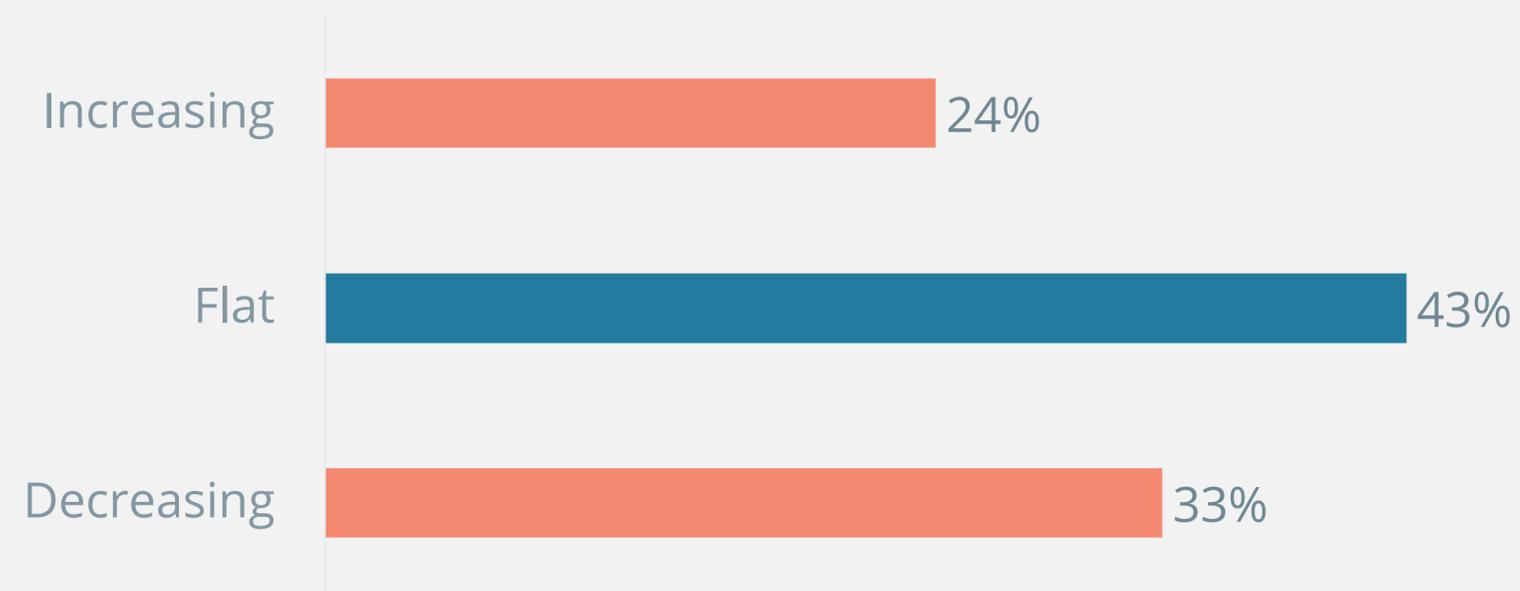
The top reasons cited by colleges and universities that reported an increase in enrolment:

- active recruitment efforts (61.1%),
- active outreach to admitted students (45.1%)
- growing reputation and visibility of their institution (45.1%)

“Cost of tuition and fees at US host institution” was the second most important factor affecting the decline in international student enrolment after visa-related issues.”

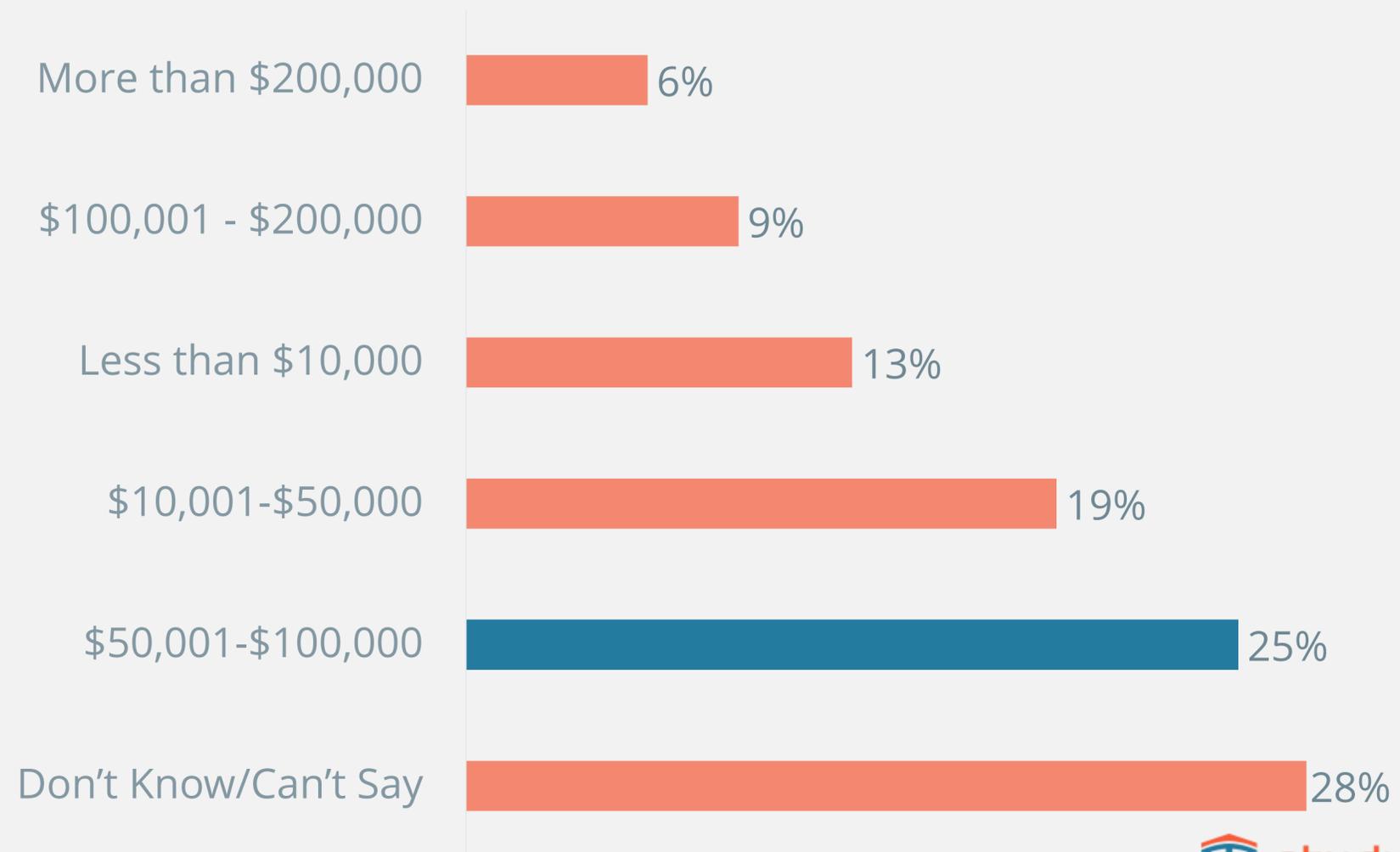
International enrolment outlook for Fall 2018

Only a quarter of webinar attendees expect an increase in international intake



Annual budget for international recruitment and marketing

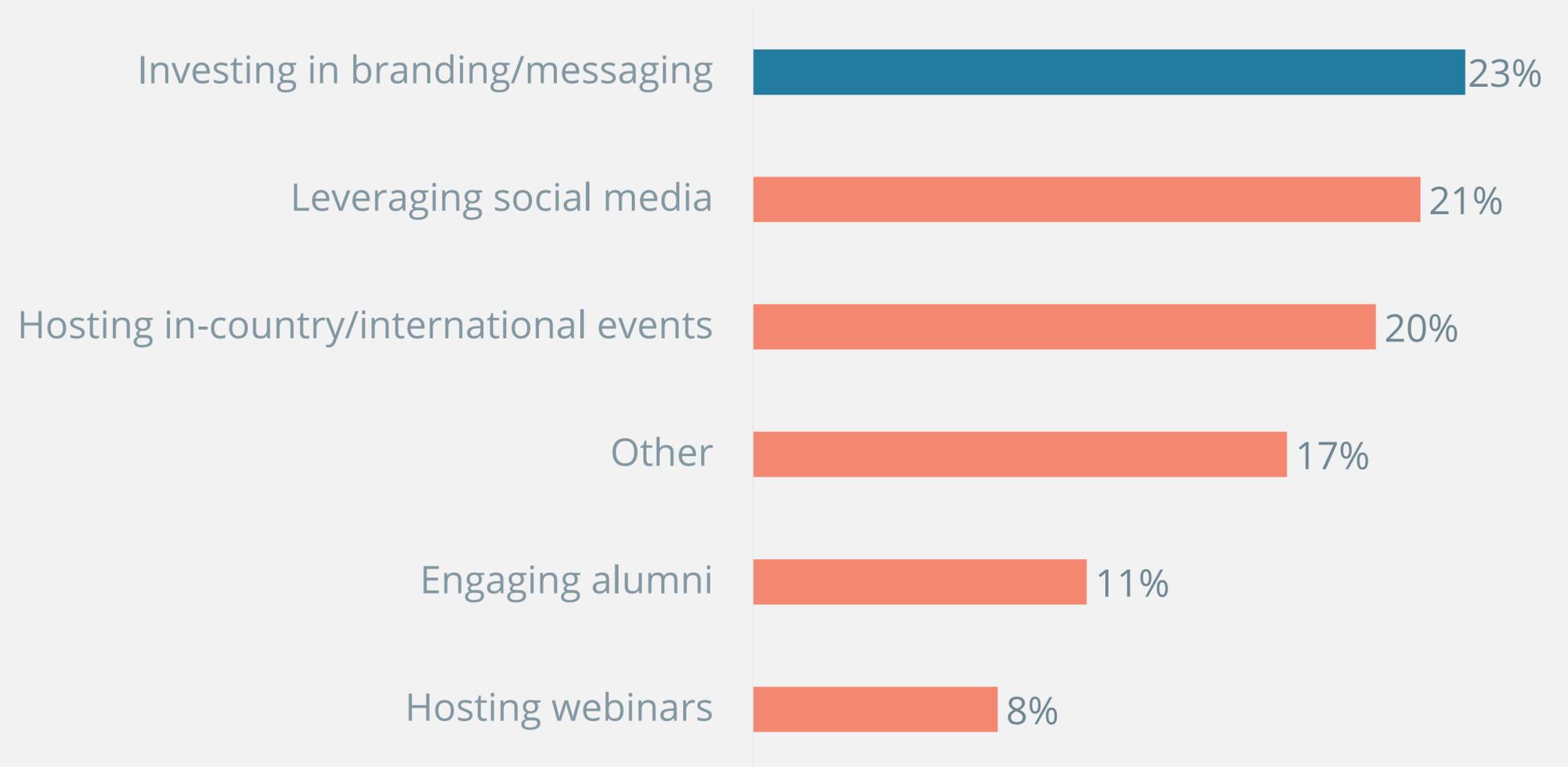
25% of webinar attendees reported an allocated marketing budget between \$50,001 - \$100,000



In search of solutions for future-proofing international enrolment

How are you overcoming negative perceptions and improving yield?

23% of webinar attendees reported investing in branding and messaging





Daniel Palm

Associate Vice President for
Global Initiatives

Northern Arizona University

- Institutional Context
 - Public; City: Small
 - Doctoral Universities: Higher Research Activity
 - Total Enrollment (Fall 2017)
 - UG: 27,086 | Grad: 3,971
 - International Enrollment (Fall 2017)
 - UG: 1,139 | Grad: 201
- Branding and personalized outreach remain critical tools to connect with international students
- Investing in online branding and awareness to ensure that your university is showing prominently in regional search
- Adding local expertise through in-country staffing to build strong local relationships and a nimble model which allows the institution to more quickly adapt to changes in the external conditions - political, financial, student perceptions, and more
- Leveraging the university's geopolitical location to inform a strategy which addresses the most important markets from a point of view of proximity, familiarity and long-term growth potential (e.g. Latin America)



David Di Maria

Associate Vice Provost for
International Programs

University of Maryland,
Baltimore County

- Institutional Context
 - Public; Suburb: Large
 - Doctoral Universities: Higher Research Activity
 - Total Enrollment (Fall 2017)
 - UG: 11,234 | Grad: 2,428
 - International Enrollment (Fall 2017)
 - UG: 454 | Grad: 565
- Promoting career opportunities for international students is critical as successful alumni are loyal ambassadors and a good recruitment channel
- Offering tuition discounts/scholarships based on market affordability and priority can help grow and diversify the applicant pool
- Investing in staff retention and development as responsiveness during admissions is one of the major factors which positively influence students' decision-making
- Pursuing strategic reinvestment model to develop adequate infrastructure to support recruitment and retention success



Karen Vahey

Dean, Enrollment
Management
New York Institute of
Technology

- Institutional Context
 - Private; Suburb: Large
 - Master's Colleges & Universities: Larger Programs
 - Total Enrollment (Fall 2017)
 - UG: 3,664 | Grad: 7,403
 - International Enrollment (Fall 2017)
 - UG: 599 | Grad: 669
- Focusing on content related to visa preparations and student life. Engage applicants through social media and Facebook live to improve yield
- Strengthening the relationship with on-the-ground stakeholders including universities, embassies and regional bodies to speed up and facilitate processes
- Despite the withdrawal of SACM scholarships, Saudi Arabia remains an important source country, and simultaneously, new markets like Vietnam are well worth exploring.
- It is critical to track the ROI of your efforts by the source of your marketing activities and identify the working strategies, while discontinuing the non-productive ones



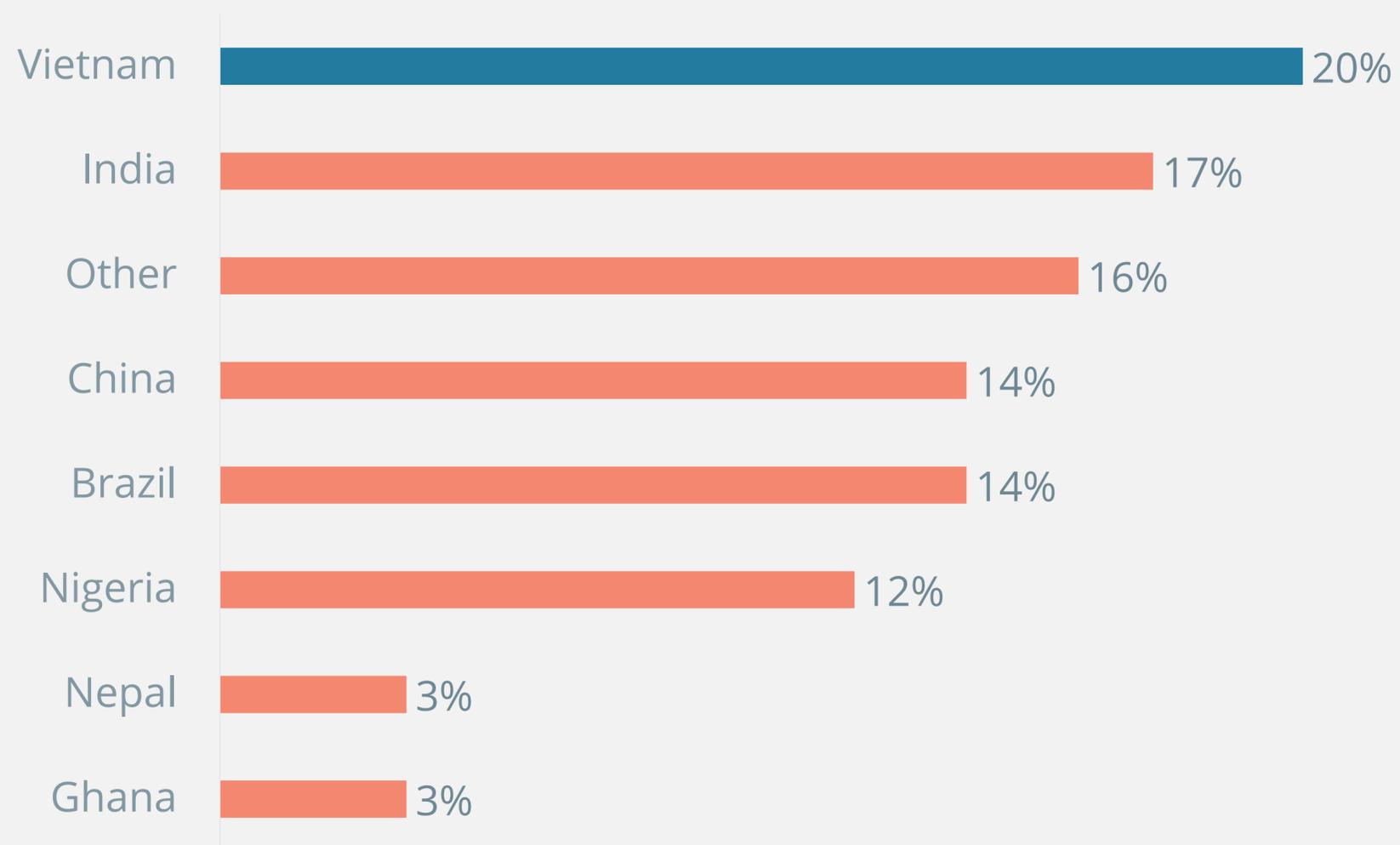
Paul Hofmann

Associate Vice President
for International Programs
California State University,
Sacramento

- Institutional Context
 - Public; City: Large
 - Master's Colleges & Universities: Larger Programs
 - Total Enrollment (Fall 2017)
 - UG: 28,055 | Grad: 2,606
 - International Enrollment (Fall 2017)
 - UG: 236 | Grad: 187
- Streamlining the inquiry and admissions to provide timely and prompt turnaround
- Engaging with local governments and businesses to increase overseas opportunities
- Intensifying efforts to diversify enrollment, while maintaining numbers from key source countries like China and India
- Developing partnerships of varying forms to ensure a more steady enrollment pipeline

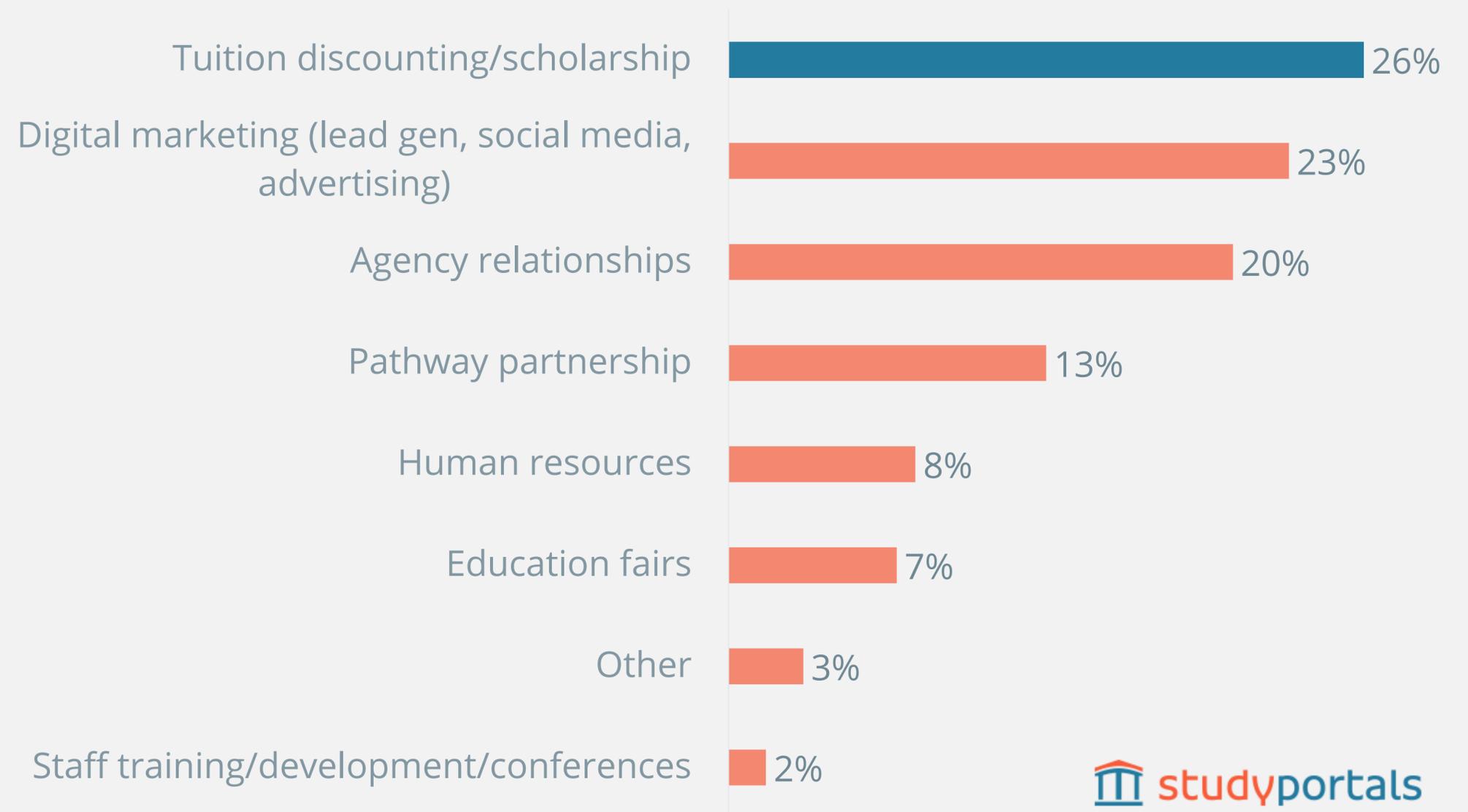
If I had additional 10% budget, I will invest in:

20% of webinar attendees identified Vietnam as key market



If I had additional 10% budget, I will invest in:

26% of webinar attendees considered tuition discounts and scholarships



Concluding Thoughts

Wave III of international student mobility is shaped by an intense competition for gaining the attention of prospective students in times of unfavourable political climate.

Brand awareness is one of the key challenges facing universities seeking to recruit international students. As the poll results and expert panel suggest, investing in branding and digital outreach is becoming increasingly critical. In addition, leveraging financial models such as tuition discounting/scholarships and reinvestment strategies can help diversify source countries and support student success. Finally, developing strategic institutional partnerships can aid in providing a more predictable flow of students.

In sum, “turning the tide” of international enrolment in the Wave III calls for innovation, experimentation, and adoption of recruitment strategies that are not only cost-effective but allow for targeted outreach in line with shifting student behaviour around the world. The success of many institutions will depend on how quickly and effectively they prepare for the Third Wave.

Look forward your continued engagement.

Rahul Choudaha, Ph.D.

EVP of Global Engagement, Research & Intelligence

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Webinar

The Innovation Imperative for a Globally Relevant and Impactful University

Access the webinar at bit.ly/GlobalEdLead



Ann Buller
President
Centennial College



Ashish K. Vaidya
Interim President
St. Cloud State University



Elizabeth J. Stroble
President
Webster University



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Webinar

Envisioning Pathways to 2030: Megatrends Shaping the Future of Global Higher Education and International Student Mobility

Access the webinar at bit.ly/Megatrends2030



David Finegold
President
Chatham University



Fernando León Garcia
President
CETYS University System



Wendy Purcell
Emeritus President & VC
Plymouth University



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