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

Daniel Palm
Associate Vice President for Global Initiatives
Northern Arizona University

David di Maria
Associate Vice Provost for International Programs
University of Maryland, Baltimore Country

Karen Vahey
Dean, Enrollment Management
New York Institute of Technology

Paul Hofmann
Associate Vice President for International Programs
California State University, Sacramento

Rahul Choudaha
Executive Vice President of Global Engagement, Research and Intelligence
Studyportals
Studypportals 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
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.
EVP of Global Engagement, Research & Intelligence
Rahul@Studyportals.com
The three waves of international student mobility

1. **Wave 1**
   - **1999 - 2006**
   - Impact of the 9/11 terrorist attack
   - Enrollment change: +10% (+46,908)

2. **Wave 2**
   - **2006 - 2013**
   - Impact of the global financial recession
   - Enrollment change: +39% (+198,240)

3. **Wave 3**
   - **2013 - 2020**
   - Impact of a new political order
   - Enrollment change (est.): +18% (+126,104)

Financial loss will shake-up some institutions

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

*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

<table>
<thead>
<tr>
<th>Category</th>
<th>2016/17</th>
<th>2010/11</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td>945,666</td>
<td>607,478</td>
<td>+56%</td>
</tr>
<tr>
<td>Doctoral Universities</td>
<td>747,175</td>
<td>451,122</td>
<td>+66%</td>
</tr>
<tr>
<td>Master's Colleges and Universities</td>
<td>162,418</td>
<td>127,686</td>
<td>+27%</td>
</tr>
<tr>
<td>Baccalaureate Colleges</td>
<td>36,073</td>
<td>28,670</td>
<td>+26%</td>
</tr>
</tbody>
</table>

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.”

Baer, J. (2017, November). International Student Enrollment Hot Topics Survey, IIE
Only a quarter of webinar attendees expect an increase in international intake.

- Increasing: 24%
- Flat: 43%
- Decreasing: 33%
Annual budget for international recruitment and marketing

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

- More than $200,000: 6%
- $100,001 - $200,000: 9%
- Less than $10,000: 13%
- $10,001 - $50,000: 19%
- $50,001 - $100,000: 25%
- Don't Know/Can't Say: 28%
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

- Investing in branding/messaging: 23%
- Leveraging social media: 21%
- Hosting in-country/international events: 20%
- Other: 17%
- Engaging alumni: 11%
- Hosting webinars: 8%
• **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
• 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

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vietnam</td>
<td>20%</td>
</tr>
<tr>
<td>India</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>16%</td>
</tr>
<tr>
<td>China</td>
<td>14%</td>
</tr>
<tr>
<td>Brazil</td>
<td>14%</td>
</tr>
<tr>
<td>Nigeria</td>
<td>12%</td>
</tr>
<tr>
<td>Nepal</td>
<td>3%</td>
</tr>
<tr>
<td>Ghana</td>
<td>3%</td>
</tr>
</tbody>
</table>
If I had additional 10% budget, I will invest in:

26% of webinar attendees considered tuition discounts and scholarships

- Tuition discounting/scholarship: 26%
- Digital marketing (lead gen, social media, advertising): 23%
- Agency relationships: 20%
- Pathway partnership: 13%
- Human resources: 8%
- Education fairs: 7%
- Other: 3%
- Staff training/development/conferences: 2%
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
Rahul@Studyporhtals.com
Webinar
The Innovation Imperative for a Globally Relevant and Impactful University

Access the webinar at bit.ly/GlobalEdLead
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 García
President
CETYS University System

Wendy Purcell
Emeritus President & VC
Plymouth University

Rahul Choudaha
EVP of Global Engagement
Studyportals