

International Student Mobility Trends 2013: Towards Responsive Recruitment Strategies

Rahul Choudaha, Director
Li Chang, Research Associate
Yoko Kono, Research Associate

WES Research & Advisory Services
www.wes.org/RAS
ras@wes.org



© 2013 WES All rights reserved | March 2013

Recommended Citation: Choudaha, R., Chang, L. and Kono, Y. (2013, March)
International Student Mobility Trends 2013: Towards Responsive Recruitment Strategies,
World Education Services, New York. Retrieved from www.wes.org/RAS

WES Research Reports

Visit wes.org/RAS to download our free reports.

To stay on top of these trends, please [subscribe to our newsletter](#).

WES
Research &
Advisory Services

05

International
Student
Segmentation

Student Segmentation for an Effective International Enrollment Strategy

Examines how different international student segments inform enrollment strategies. The report is based on a survey of nearly 3,000 U.S.-bound international students and highlights how information gathering varies by education level and country.

WES
Research &
Advisory Services

03

Beyond
More
of the Same

Beyond More of the Same: The Top Four Emerging Markets for International Student Recruitment

Identifies key emerging countries with promising recruitment potential and includes near-term strategies to nurture these markets. Report recommends that institutions adopt a portfolio approach to balance recruitment opportunities with the potential risks and uncertainties of expanding their efforts to emerging markets.

WES
Research &
Advisory Services

02

Not All
International
Students are
the Same

Not All International Students are the Same: Understanding Segments, Mapping Behavior

Highlights how differences in academic preparedness and financial resources impact the information-seeking behavior of prospective international students and identifies four types of international students: *Strivers*, *Strugglers*, *Explorers*, and *Highfliers*.

WES
Research &
Advisory Services

01

Trends in
International
Student
Mobility

Trends in International Student Mobility

The purpose of this research is to provide an in-depth understanding of the trends and issues related to international student enrollment and to help institutional leaders and administrators make informed decisions and effectively set priorities.



Mobility Monitor

WES Research & Advisory Services' monthly Mobility Monitor analyzes international student mobility patterns to help institutions inform their market-specific strategies.

Executive Summary

The global student mobility landscape is in constant flux. Consider how patterns of the top senders of international students to the U.S. have changed over the past decade. China took over from Japan as the leading source of international students in 1999/00, before being overtaken by India in 2001/02, and then regaining the reigns in 2009/10. Japanese enrollments have plunged from a peak of just over 47,100 in 1997/98 to less than 20,000 in 2011/12; while student enrollments from select emerging markets have grown rapidly. Enrollments from Saudi Arabia, for example, have increased by over 700 percent since 2002/03, from 4,200 to 34,100 in 2011/12 (IIE 2012).

Students from strong-growth countries such as China and Saudi Arabia are more likely to be fully funded and enrolled at the undergraduate level. More significantly, their inflow has come at a time when public higher education institutions are seeking alternative revenue streams to compensate for recent state budget cuts. As a result, we observe a growing trend among institutions to recruit more well-funded international students in undergraduate programs.

From the supply side, the recent trend toward the purposeful recruitment of international students has been instigated by the global recession and the consequent decrease in state support for higher education. Many institutions, however, have lacked the internal capacity and preparedness for this sudden shift towards proactive recruitment. Moreover, insufficient understanding of near-term student mobility trends and effective recruitment practices can be detrimental to their future strategic directions. In this report, we aim to address this knowledge gap and assist institutions in prioritizing resources and building capacity.

In particular, we discuss three topics: 1) a comparative perspective of international student mobility patterns (both globally and U.S.-focused) based on an analysis of data from multiple sources; 2) trends in recruitment practices from a survey of international enrollment management professionals; and 3) a framework for responsive recruitment strategies for higher education institutions.

Our data analysis indicates that the rise of international students in the U.S. is driven by undergraduates, those who pursue business-related disciplines, and those that follow the Intensive English Program pathway. They are more attuned to word-of-mouth communication via social media and need more support services as opposed to the traditional segment of self-directed graduate students. Mirroring these findings, our survey results suggest that external pressures are compelling institutions to seek more aggressive, diverse, and efficient international enrollment growth. Based on our synthesis of experiences and recruitment practices shared by survey respondents, we recommend a framework for responsive strategies that emphasizes the interplay of technology, partnership, and research. This framework will help institutions to understand what works and what doesn't, and deploy informed and cost-effective outreach strategies.

There is no magic formula for achieving sustainable international student enrollment growth, especially in the unpredictable environment of globalization. Each recruitment strategy has its own promises and challenges, and yields varying measures of success. But by implementing a holistic strategy based on technology, partnerships, and research, institutions can make their international student recruitment responsive and productive.

Table of Contents

Executive summary.....	3
Introduction	5
Growth in international undergraduate students.....	6
Comparative trends in undergraduate enrollment.....	6
Source countries vary in potential for undergraduate recruitment	8
Business fields draw more attention.....	9
Intensive English programs become a recruitment pathway	9
Institutional priorities: aggressive, diverse, and efficient growth	10
Trends in recruitment practices.....	11
Technology	11
Partnerships	12
Research	12
Recommendations and conclusions.....	14
Appendix.....	16
Innovative models of recruitment	16
Methods.....	17
Who participated in the survey?	17
Acknowledgements.....	17
References and notes	18

Figures and Table

Figure 1: Comparative trends in international undergraduate enrollment, 2004 vs. 2012	7
Figure 2: Top 25 source countries of international undergraduate students in the U.S., 2012 vs. 2004	8
Figure 3: Comparative trends in international undergraduate student enrollment in business programs, 2004 vs. 2012	9
Figure 4: The interplay of responsive strategies.....	14

Introduction

The global student mobility landscape is in constant flux and is often influenced by external factors that higher education institutions (HEIs) cannot control. Influential forces on international student mobility can come from numerous directions. These include, but are not limited to: demographics; economic growth and decline; the expansion of local higher education systems; immigration policies and regulatory environments of competing host countries; government-initiated scholarship programs; and the emergence of technology-enabled alternatives like MOOCs.¹

Consider how student mobility patterns to the United States (U.S.) have changed in the decade following the 9/11 terrorist attacks. Due to visa policy changes and perceptions that the U.S. had become a less welcoming host country for international students, enrollment growth stalled in the immediate aftermath of the attacks. At that time, Indians represented the largest international student population, rising almost 12 percent in 2002/03 compared to just two percent among Chinese students—bucking an overall downward trend in enrollments that would last until the 2006/07 academic year (IIE 2012).

Within a decade, that story has been turned on its head. Overall enrollments are again growing at a healthy level. Chinese enrollments have been booming at an average annual growth rate of well above 20 percent since 2007/08, while Indian enrollments have stagnated and recently started a downward trajectory. New players have entered the picture, such as Saudi Arabia that experienced a massive enrollment growth of over 700 percent since 2002/03, from 4,200 to 34,100 in 2011/12 (IIE 2012).

Many of the external factors swaying student mobility cannot be controlled by individual HEIs; however, post-recession budget cuts in U.S. public higher education have prompted many to actively recruit international students. And while the catalysts to recruit international students are largely external, institutions have often found themselves internally under-prepared for this sudden shift towards more proactive recruitment.²

With these thoughts in mind, this report aims to help HEIs understand key mobility trends and their implications for recruitment practices. We focus on recognizing current and future mobility trends and accompanying institutional practices for the 2013/14 recruitment cycle, or the class entering the 2014/15 academic year.

We present this research in three primary sections. First, we provide a comparative perspective of international student mobility patterns based on our analysis of data from multiple sources. Then we report trends in recruitment practices from survey responses from international enrollment management professionals. Finally, we conclude with a framework for responsive recruitment strategies for institutions.

Growth in International Undergraduate Students

In 2010, the international student population reached nearly 3.6 million worldwide, according to UNESCO data released in 2012, soaring by almost 50 percent over the past six years (2.5 million in 2004).³ Competition for international students is becoming more intense and complex, as reflected by the diminishing global market share of the four key players—the U.S., the United Kingdom (UK), Australia, and Canada.⁴ Although overall growth of globally mobile students is expected to continue, its composition in terms of where they come from, where they are going, and their level of study is changing.

One overarching mobility trend of the new millennium has been the rise of international students at the undergraduate level. Driven by increasing affluence in source countries like China and government-initiated scholarship programs as in Saudi Arabia, more fully-funded students are heading abroad. It is reported that in 2012, over 95 percent of Chinese students studying overseas were self-funded.⁵ Similarly, as of January 2012, two-thirds of Saudi students pursuing higher education abroad were funded by their government.⁶ This couldn't be any timelier for public institutions seeking alternative revenue streams to compensate for budget cuts. In fact, for the first time in U.S. history, international bachelor's students reached a quarter of a million, and together with associate's enrollments, they surpassed the number of international graduate students (IIE 2012).

We observe a growing trend among institutions to enroll more well-funded international students in undergraduate programs. The phenomenon is being fueled by the growth of the middle class in a number of emerging nations, the new financial needs of public universities and colleges, and the broader internationalization goals of institutions that want to be relevant in a new era of globalization. For the sake of simplicity, we use the terms “undergraduate” and “bachelor's” students interchangeably, which exclude those enrolled in two-year programs.

We elaborate on this growing segment of international students in the following four subsections: comparative trends in undergraduate enrollment; varying undergraduate recruitment potential by source country; increasing interest in business fields; and the rising popularity of the Intensive English Program (IEP) pathway. Above all, admissions professionals must stay abreast of global trends to adapt their recruitment strategies accordingly. Therefore, we first present an in-depth discussion on enrollment trends in major destinations under a comparative framework.

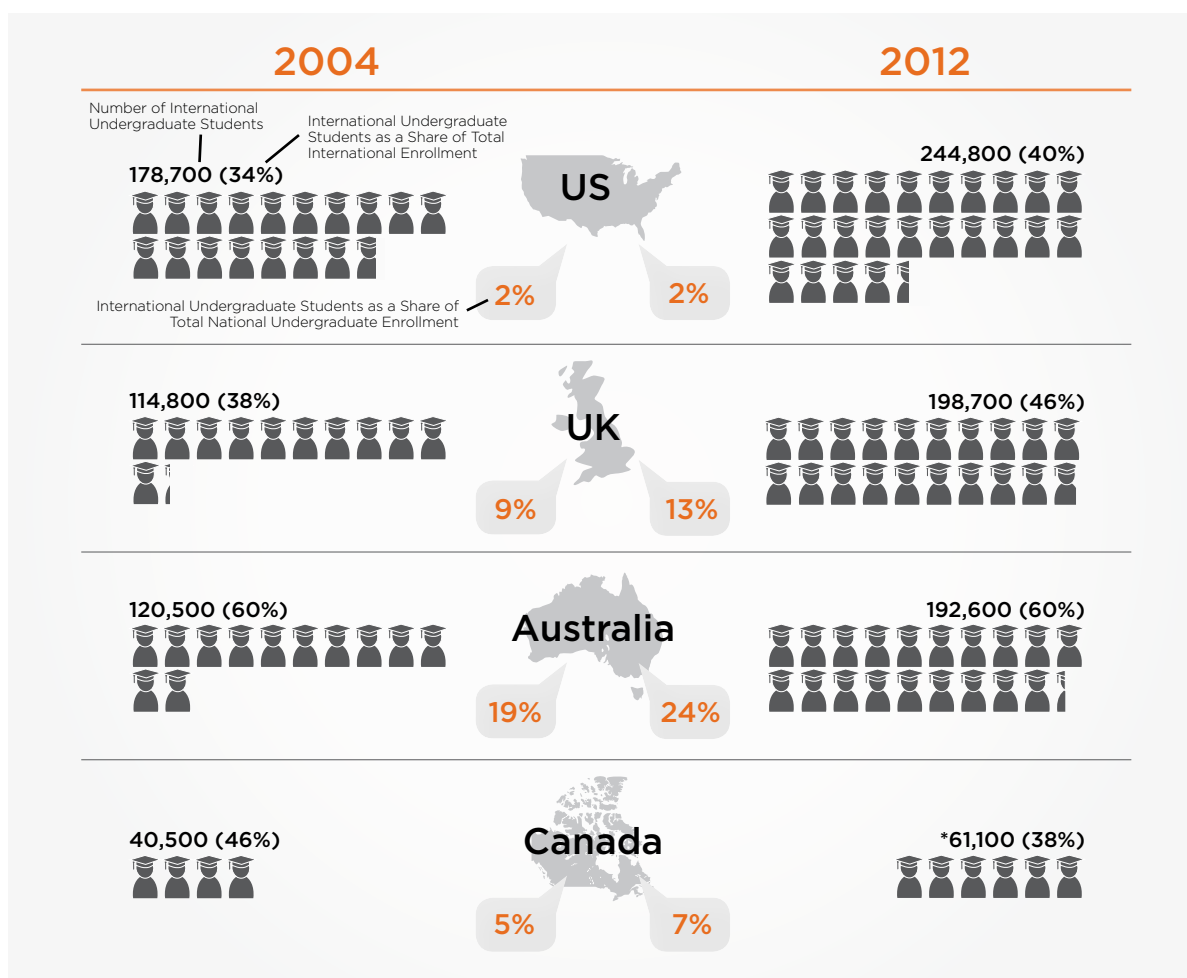
COMPARATIVE TRENDS IN UNDERGRADUATE ENROLLMENT

International student enrollment growth is driven by students at the undergraduate level; in other words, they are increasingly studying abroad at a younger age. As FIGURE 1 shows, all four of the host countries that we look at have significantly increased their intake of international undergraduate students between 2004 and 2012. Not surprisingly because of their aggressive recruitment practices, the UK and Australia have seen the strongest growth, with increases of international undergraduate students in excess of 60 percent during this period. The U.S. and Canada by comparison have seen international undergraduate growth between 40 and 50 percent over the same timeframe. Australia has the largest concentration of international undergraduates with three out of five international students enrolled at the undergraduate level in 2012.

When compared to graduate figures, undergraduate enrollments in the U.S. have clearly been the engine of growth, with enrollments jumping 37 percent between 2004 and 2012 as compared to 10 percent at the graduate level during the same period. In 2012, nearly a quarter million international students studied in undergraduate programs at U.S. HEIs (IIE 2012). The most recent data from the Immigration and Customs Enforcement agency suggests a continuation of this growth story, with Student and Exchange Visitor Information System (SEVIS) data showing a 12 percent jump in registered international students in undergraduate programs from September 2011 to September 2012, again outpacing growth at other education levels.⁷

Although the U.S. falls behind the three other big English-language destinations in percentage growth, it has the greatest potential for growth of international students in undergraduate programs. Whereas 13 percent and 24 percent of the total undergraduate population was international in the UK and Australia respectively in 2012, in the U.S. the proportion of international students was just two percent of the overall student body in 2012 (FIGURE 1).

FIGURE 1: Comparative Trends in International Undergraduate Enrollment, 2004 vs. 2012



Reading instructions: In 2012, 244,800 international students studied in undergraduate programs in the U.S., which accounted for 40 percent of all international students and two percent of total national (domestic and international) enrollment in undergraduate programs. Sheer numbers are rounded off to the nearest hundred. *Canada figures of 2012 refer to the 2010-11 academic year. Source: Institute of International Education (IIE); Higher Education Statistics Agency (HESA); Department of Education, Employment and Workplace Relations (DEEWR), Statistics Canada (SC). See Note 8 for sources and definitions of population.⁸

SOURCE COUNTRIES VARY IN POTENTIAL FOR UNDERGRADUATE RECRUITMENT

Looking at overall patterns from the 1950s until the end of the twentieth century, the U.S. has historically received more international undergraduate students than graduate, but the latter took over from 2002 to 2011. Last year, the tide turned once again with undergraduate students comprising the majority of total international enrollment.

Although international undergraduate enrollment has seen aggregate gains in the U.S., the top senders of these students have altered over time. FIGURE 2 shows that China is the story of the decade with the number of undergraduate students ballooning from roughly 8,000 to 74,500 over eight years. Before China became the dominant source of undergraduate students, Japan sent the most with nearly 28,000 in 2004—more than three times the number of Chinese undergraduates.

A look into the levels of study reveals that students from some countries have a higher propensity than others to study at the undergraduate level. For example, more than 70 percent of students from Malaysia, Indonesia, and Saudi Arabia are enrolled in associate's and bachelor's programs. By contrast, Iran and Taiwan are primarily graduate-student-focused markets. India is similarly a graduate market, but a combination of socioeconomic and demographic factors suggest an inflow of more Indian undergraduates in the coming years.⁹

FIGURE 2: Top 25 Source Countries of International Undergraduate Students in the U.S., 2012 vs. 2004

Place of Origin	Rank in 2012 (Change of Rank from 2004)	Undergrad Enrollment in 2012	% Change from 2004	% Undergrad from Source Country in 2012
China	1 (↑6)	74,516	828%	46%
South Korea	2 (-)	38,232	68%	64%
Saudi Arabia	3 (↑28)	14,344	609%	70%
India	4 (-)	13,059	-3%	18%
Canada	5 (↓2)	12,866	-8%	53%
Vietnam	6 (↑22)	11,244	405%	81%
Japan	7 (↓6)	9,359	-66%	68%
Mexico	8 (↓2)	7,564	-9%	64%
Taiwan	9 (↓4)	6,000	-29%	33%
Hong Kong	10 (↓1)	5,673	3%	84%
Nepal	11 (↑10)	5,132	70%	65%
Malaysia	12 (↑1)	4,585	1%	78%
Indonesia	13 (↓5)	4,569	-27%	74%
United Kingdom	14 (↓3)	4,330	-13%	64%
Brazil	15 (↑1)	4,215	-1%	59%
Venezuela	16 (↑4)	3,804	8%	76%
Nigeria	17 (↓2)	3,577	-17%	59%
Turkey	18 (↑1)	3,495	-5%	36%
Germany	19 (↓2)	3,099	-21%	49%
France	20 (↑3)	2,745	0%	52%
Sweden	21 (↑6)	2,589	15%	87%
Kuwait	22 (↑21)	2,468	83%	81%
Thailand	23 (↑1)	2,453	0%	39%
Colombia	24 (↓10)	2,389	-45%	46%
Kenya	25 (↓15)	2,145	-60%	64%

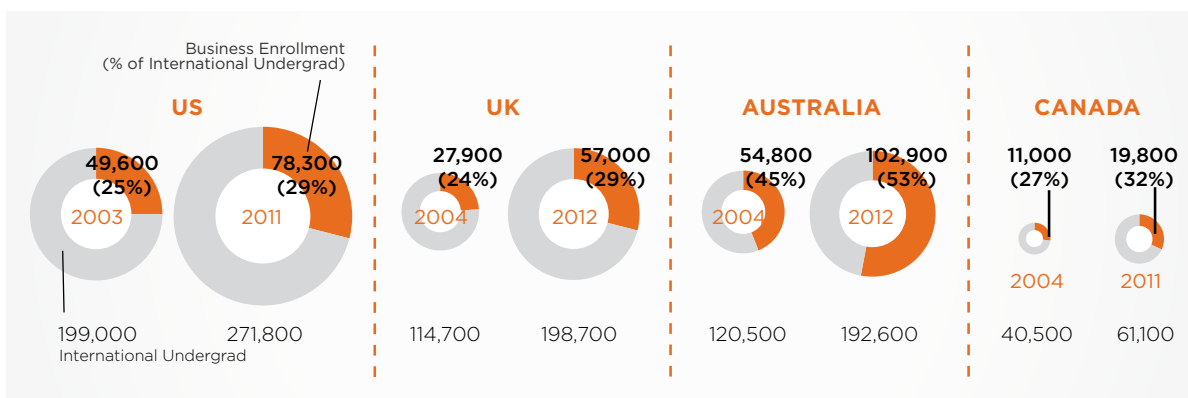
Note: Since IIE does not provide enrollment volume by program of study by country, undergraduate enrollment here includes students in associate's and bachelor's programs. Reading instructions: In 2004, Japan was the largest source of international undergraduate students in the U.S. Japan dropped to seventh place in 2012 with only 9,359 undergraduates. This translated to a 66 percent decrease as compared to 2004. Undergraduates accounted for 68 percent of all international students from Japan. Source: IIE 2012.¹⁰

BUSINESS FIELDS DRAW MORE ATTENTION

Business-related programs are the most popular single field among international students. With no signs of slowing down, the proportion of students in business fields has become bigger in recent years.¹¹ Each of the top four source countries—China, India, Korea, and Saudi Arabia—have sent significant numbers of business students to the U.S. (IIE 2012). This growth in the popularity of business programs has paralleled, to a degree, the overall demand for undergraduate programs at U.S. institutions. International graduate students are nearly twice as likely as their undergraduate counterparts to enroll in science and engineering (S&E) fields. Nearly two-thirds of international students (65%) in the S&E fields were enrolled at the graduate level in November 2010. Three-fourths of Indian students at the graduate level (77%) were enrolled in S&E fields, significantly higher than the concentration for international students overall (59%).¹² Generally speaking, business programs are more likely to appeal to undergraduates from affluent families.¹³

Consequently, we observe that business programs are becoming the main draw for international undergraduate students at degree-granting institutions in all four major English-language study destinations (FIGURE 3). Australia and the UK almost doubled their intake of international students in business programs within eight years. By contrast, international undergraduate students in business studies grew by approximately 60 percent in the U.S. between 2003 and 2011, with nearly three out of ten international undergraduates enrolled in business fields—a proportion that is now comparable to the UK and Canada. Equally noteworthy is that one in two international undergraduates in Australia opted for business studies in 2012, which suggests the host's over-reliance on students in the field.

FIGURE 3: Comparative Trends in International Undergraduate Student Enrollment in Business Programs, 2004 vs. 2012



Source: IPEDS, HESA, DEEWR, SC. Sheer numbers are rounded off to the nearest hundred. See Note 14 for a detailed description.¹⁴

INTENSIVE ENGLISH PROGRAMS BECOME A RECRUITMENT PATHWAY

Although many of today's younger international students have strong academic qualifications, many are also insufficiently prepared to enroll directly in an English-taught degree program. Younger students need time to adjust to a foreign academic system, culture, and life, and their English language skills can be the biggest barrier to degree admittance and/or academic success. As a result, the IEP sector has been growing at the fastest rate among all other fields of study in recent years. A total of 38,900

international students in the U.S. were enrolled in this type of program in 2011/12, which is more than 2.5 times as many as in 2003/04 (15,000) (IIE 2012).

The top four senders of IEP students in 2011/12 were Saudi Arabia (12,300), China (5,400), South Korea (3,100), and Japan (2,400).¹⁵ Consistent with their English language training needs, test takers from these four countries scored lower than the overall mean score of TOEFL iBT test in 2011.¹⁶ Most notably, over one-third of Saudi students (36%) were enrolled in an IEP in 2011/12 versus a total average of five percent. The mean Saudi TOEFL iBT score was 61 out of 120 as compared to the overall average of 80, making Saudi Arabia a very important market for IEPs.

Institutional Priorities: Aggressive, Diverse, and Efficient Growth

To better understand how U.S. HEIs are redefining their strategic plans, we surveyed 35 international enrollment managers in fall 2012 and gathered in-depth qualitative responses about prevailing practices in the field (refer to METHODS for further details). While recognizing that our sample of 35 HEIs is not fully representative, the research attempts to encapsulate the rich and multifaceted developments occurring at U.S. universities and colleges. We draw on these examples to illustrate U.S. institutions' changing priorities and recruitment practices.

Based on an analysis of the survey responses, it appears that across institution types and geographies, efforts to increase or maintain international student enrollment numbers is a major priority for U.S. institutions. Our respondents, such as Brian Bava, dean of enrollment at The College of Idaho, continue to focus on enrollment growth with specific targets:

In the past seven years, we have grown from six international students to over 100 from 50 different countries. Our priorities moving forward are to sustain this growth and maintain a total international student population representing roughly 10 percent of our current student body.

Mirroring the student mobility patterns at the national level, many institutions are turning their focus to undergraduate recruitment. For example, a midwestern research university that conventionally hosts more international graduate than undergraduate students said that they are now targeting new and transfer students at the undergraduate level to increase overall international enrollment.

In addition to aggressive outreach in traditional Asian markets, particularly China and India, respondents also highlighted the need for diversification of international student populations by place of origin. Dan Meyer, vice president for admissions at DePauw University, for instance, wants to maintain an international enrollment of 10 percent of their total student population, while “expand[ing their] international reach beyond the traditionally strong presence from Southeast Asia and India.” Institutions are particularly targeting newer markets in South America (especially Brazil), the Middle East and North Africa, and other parts of South and Southeast Asia.

While the U.S. has been slow to develop proactive recruitment methods compared to other major destinations, institutions here are showing increasing sophistication, such as investments in brand development and visibility, and “raising their profile” overseas. Following the practices of UK and Australian universities, these targeted efforts reflect a trend away from ad hoc recruitment practices and the adoption of what might be considered marketing-driven plans. A holistic recruitment strategy comprised of a mix of tactics has become the new norm.

TRENDS IN RECRUITMENT PRACTICES

Survey participants reported a wide array of recruitment practices to achieve aggressive and diverse international enrollment growth. These practices range from the traditional models of attending international recruitment fairs/tours to evolving models of lead generation and working with agents. Based on the analysis of qualitative responses, we find that emerging recruitment practices fall into one of three dominant themes: 1) technology for expanding reach in a cost-effective manner; 2) partnerships for creating pathways and visibility; and 3) research to prioritize efforts and measure return on investment (ROI).

TECHNOLOGY

Technology-based tools are gaining prominence among international recruitment activities. These include virtual college fairs, web-based presentations, webinars, videos, and web-chats. These conduits are especially relevant in attracting and engaging the prospective undergraduate crowd.

The institutional website is a powerful—if not *the* most powerful—tool for student segmentation,¹⁷ especially when customized for an international audience. As a previous WES research report noted, university websites are the top information source—ahead of family and friends, social media, education fairs, and agents—for U.S.-bound international students.¹⁸ According to Feroze Khan, vice president of international programs at Stratford University, they have “discovered that a good website is also a very useful resource to drive students to make enquiries and select schools.” Others are enhancing their website by translating microsites into foreign languages and adding videos. Less frequently, but still worthy of mention are the use of blogs, Facebook, and Twitter for outreach. One university uploaded a FAQ page to keep applicants updated and another used social media to inform prospective students about recruitment officers’ overseas travel.

Whereas the aforementioned technology-based tools are the go-to for lead generation; web-chats and Skype calls are equally useful in converting prospects to applicants and admits to enrollees. Maya Suraj, director of admissions at Illinois Institute of Technology said that an effective practice has been “improved application processing time, outreach to admits via Skype calls and chats, and being available multiple ways, [such as] phone, email, messaging and appointment systems.”

In this digitally connected world, technology plays a greater part in an admission office’s communication strategy than ever before. It allows universities to reduce conversion time and personalize communication—an important aspect of satisfying younger international students who expect fast turn-around service. Poor service and unresponsiveness can cost institutions students at all stages of the enrollment funnel. With an ability to transcend geographic and time barriers, as well as high potential for engagement, technology-based marketing and communication practices are likely to play an ever more influential role in international recruitment activities moving forward.

PARTNERSHIPS

Creating academic partnerships to develop student pathways and increase institutional visibility abroad is today becoming a major theme in international recruitment. These partnerships vary in nature and type, but most are designed to increase the flow of international students. Some U.S. institutions have formed agreements with foreign high schools and higher education institutions, creating a direct pathway for international students. Other collaborations have translated into twinning and dual degree programs and faculty exchanges, which draw international students and enhance brand recognition overseas.

Many U.S. institutions also work with third parties, such as EducationUSA and other government agencies, who help them reach foreign institutions and prospective international students. Depending on the model, these partnerships can be quite straightforward or complex multi-partner agreements. We heard from one university in the southern U.S. that it is experimenting with a three-way, multi-academic-level, collaboration to create a direct highway for international students to their institution:

We plan to work with a company which funnels international students into partner high schools in the United States, where they can work on their English prior to enrolling in the university. Because we do not yet have an approved ESL program, and therefore do not do well in countries where English is not strong, we hope this approach will help us enter those markets.

Our study reveals that U.S. HEIs also engage in partnerships to amplify their global credibility and brand. And in doing so, institutions hope to expand the pool of admissible prospective students.

There is clearly growing enthusiasm among U.S. institutions to build and strengthen partnerships to raise their profile and create a sustainable international student pipeline. Universities no longer only market themselves to potential students, but also engage with foreign schools, government agencies, and other organizations to carry out their recruitment priorities. These cases may be early signs of a general shift in international recruitment to long-term and interdependent relationship-building strategies.

RESEARCH

The research-based approach to recruitment also appears to be gaining traction in the international enrollment arena, with U.S. universities becoming more interested in the use of data to identify the focus of their efforts, as well as the most cost-effective method.¹⁹

Higher education institutions are cautioned against building recruitment plans without first conducting the research to map specific preferences and behaviors of student segments with practices. Examples of uninformed methods are generic promotions and advertisements that, regardless of the medium, do not address the unique characteristics of prospective international students. As one survey respondent stated, these kinds of “cattle calls” yield very little ROI because the recruitment channel likely “addresses candidates who are not suitable.”

Conversely, research empowers HEIs to make more targeted decisions in their recruitment efforts. One large public university in the western U.S. constantly conducts research to align their program offerings with the changing needs of prospective international students. The University of Mississippi, according to Greet Provoost, director of the office of international programs, sorts recruitment channels into three categories—brand development, lead generation, and applicant guidance—and measures the cost-effectiveness of each to inform the use of limited resources.

The University of North Dakota is an exemplar of combining ROI assessment with data-based tools. Evan Nelson, director of graduate admissions and recruitment, shared:

We also do not invest as heavily in international recruitment as we do in domestic recruitment, as the cost-per-prospect of an international student is higher and the yield-per-prospect of international students is lower. Therefore, we know that we spend more to gain fewer enrollees. Considering the above, our main international recruitment strategies are web-based—virtual student fairs and translated microsites. These web-based tactics all direct traffic into our CRM recruiting system, which is used for domestic and international applicants. We do not currently have any travel plans to these foreign countries, and it is very unlikely that we will.

As U.S. institutions are increasingly defined by tight budgets, data and research will increasingly shape strategic decisions. This goes hand-in-hand with the availability of new technology-based tools that provide easier accessibility to data and analytics.

Through our survey respondents, we have outlined the growth of three innovative recruitment approaches—technology, partnerships, and research—at U.S. universities and colleges. Higher education institutions should integrate these newer practices into their overall international enrollment strategy. In the next section of this paper, we present how these prevailing practices can be implemented in the most effective manner.

Many more survey respondents shared their experiences in international student recruitment than what could be covered in this report. Refer to [INNOVATIVE MODELS OF RECRUITMENT](#), for a list of approaches your peers are experimenting with.

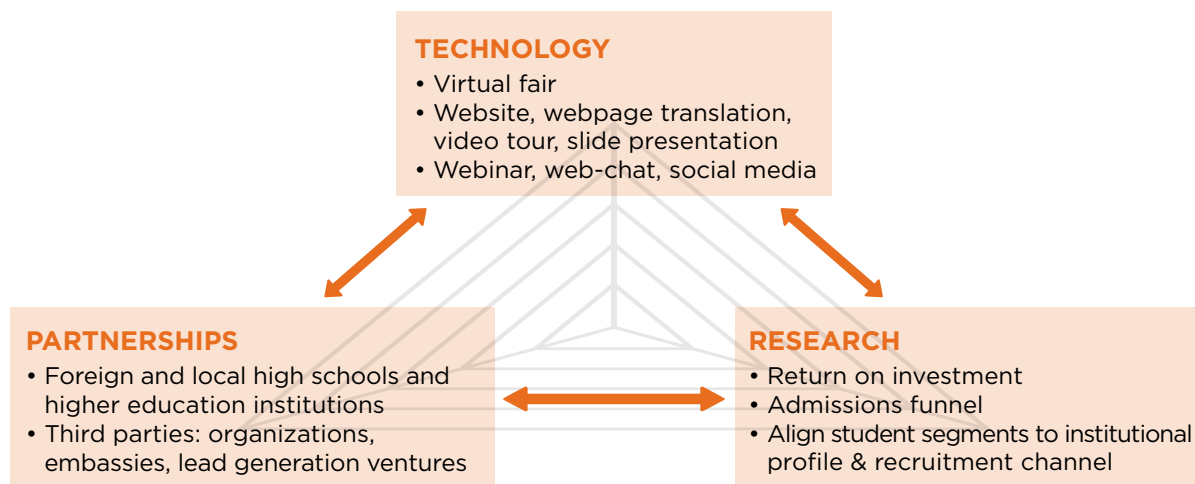
Recommendations and Conclusions

The purpose of this research report was to identify near-term student mobility patterns and corresponding institutional recruitment practices in the U.S. Our research makes clear that today, U.S. universities and colleges face higher expectations to meet international enrollment targets, as they recruit from untested emerging markets or engage with new populations of prospective international undergraduate students.

More specifically, our research points to a new megatrend of international student enrollment expanding at the undergraduate level. We found that more students are traveling abroad at a younger age primarily in business-related programs and through IEPs; although this will vary significantly by source countries. In terms of institutional priorities, we found that HEIs are aiming to achieve aggressive, diverse, and efficient international enrollment growth.

Based on our synthesis of experiences and the recruitment practices shared by our experts, we recommend a framework for responsive strategies that emphasizes the interplay of technology, partnership, and research (FIGURE 4). For optimal recruitment outcomes, U.S. HEIs should employ these three key practices in tandem to produce aggressive and efficient enrollment growth.

FIGURE 4: The Interplay of Responsive Strategies



Within this framework, and by measuring and adjusting their recruitment efforts throughout the admissions funnel, institutions should achieve higher enrollment yields. This will not only help institutions prioritize their efforts by knowing what works and what doesn't, but it will also allow them to use the segment-based outreach strategies that are more cost-effective. Likewise, partnership models can expand access to prospective students with positive word-of-mouth amplified through social media and face-to-face communication.

Today's growth in international enrollment in the U.S. is driven by younger, financially and technologically empowered students at the undergraduate level; whereas, the traditional segment of self-directed graduate students who attend funded research programs is stagnating at most U.S. institutions. This means that the opportunities for HEIs to internationalize and expand their student bodies lie mainly at the undergraduate level.

The emerging segment of well-funded international undergraduate students presents HEIs with an opportunity to help bridge budgetary shortfalls, while also posing recruitment challenges; however, it is also imperative that HEIs not lose sight of the broader goals of internationalization which includes embracing diversity to enhance academic and cultural experiences.

To achieve international enrollment goals in a cost-effective manner without compromising the ideals of internationalization, HEIs would need to:

1. **Understand the decision-making processes, needs, and preferences of the new segment of international undergraduate students:** Unlike the graduate segment, the decision-making process of undergraduate students is more susceptible to external factors, such as location, parents, support services, and word-of-mouth via social media. Their mobility patterns and preferences are also distinct from international graduate students. Higher education institutions cannot simply extend the practices designed for recruiting and admitting graduate students to this unique and emerging segment of undergraduate students.
2. **Adopt responsive institutional strategies and practices that are mapped to student needs:** International enrollment strategies are effective and sustainable only when they are aligned with the specific needs and preferences of the targeted student segment. Proactive U.S. universities and colleges can respond effectively to the rise of well-funded international undergraduate students by developing their internal capacities and implementing a strategy based on the iterative interplay among technology, partnerships, and research.

There is no magic formula for achieving sustainable international student enrollment growth, especially in the unpredictable environment of globalization. Each recruitment strategy has its own promises and challenges, and yields varying measures of success. But by implementing a holistic strategy based on technology, partnerships, and research, institutions can make their international student recruitment responsive and productive.

Appendix

INNOVATIVE MODELS OF RECRUITMENT

Many more survey respondents shared their experiences in international student recruitment than what could be covered within the narrative. Whether it's offering a new pathway program or fostering international faculty ambassadors, HEIs are clearly thinking out of the box to achieve their enrollment goals. We highlight some notable innovative models of recruitment below, which we hope inspires others to experiment with new ideas.

“We are looking to create some partnerships in which international students complete their last two years at our college and then stay for a one-year Master’s degree.”

(Mark Gould, AVP, International Enrollment Management, Merrimack College)

“[We plan to develop a] bridge program for students with three-year bachelor’s [degree]. Currently we are piloting that with two programs that are popular with international students.”

(Colleen Flynn Thapalia, Director, International Recruitment & Admissions, The College of Saint Rose)

“We utilize the same merit scholarship criteria for both domestic and international students. This has helped us increase the academic profile of the international students we enroll.”

(Dan Meyer, VP for Admissions, DePauw University)

“Working with our alumni in China [has been effective]. We invited them to our presentations and made sure that they were aware of all of our changes. We have at least five chapters in China. The challenge was to make sure that all of the players on your campus are on the same page and you are not annoying them. We also worked with an organization in China through Study Illinois that is part of the U.S. government. They were very helpful in setting up presentations. In return, we were able to tell them about the U.S. and its education system without a hard sell.”

(Joanne Canyon-Heller, Assistant Provost for International Academic Programs & Summer Sessions, Roosevelt University)

“Our Office of International Education and Development also plans to train a group of English teachers from China next summer, with the hopes that they will act as advocates for our university when they return to their schools.”

(Lloyd Scott, Director of Admissions, Appalachian State University)

“Spotlighting our international students is important. Video interviews with students to highlight their experiences will be up on our website and in our other materials. Drawing attention to these will be a challenge, as well as capturing an honest opinion without things seeming ‘canned’.”

(VP of Enrollment Management at a university in the northeastern U.S.)

“We video interview all of our international applicants that are unable to travel to campus for a visit. This allows us to develop rapport with them and make a personal connection. After the interview we have a current international student follow up with the candidate via email. A Facebook group for incoming students has also allowed prospective students to connect with each other. These are all low-cost activities that are easy to implement.”

(Director of MBA Admissions at a university in the southern U.S.)

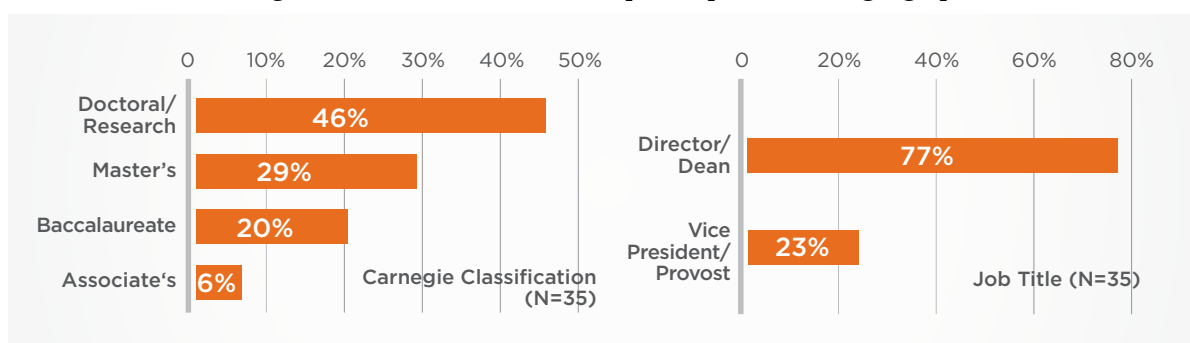
METHODS

The findings under INSTITUTIONAL PRIORITIES are based on an online survey distributed to professionals at U.S. higher education institutions in fall 2012. We shortlisted professionals from a convenience sample based on their job title and self-rated expertise in international student recruitment and enrollment management. The short open-ended questionnaire included questions, such as the following: What are your recruitment priorities for international enrollment? What are some effective recruitment strategies or practices that showcase your institution's success in international enrollment management?

Experts from 35 universities and colleges across the U.S. completed our survey. We then coded and analyzed their responses to extract themes. As stated earlier, while recognizing that this is not a representative sample, our attempt was to capture rich and detailed developments occurring at U.S. universities and colleges.

WHO PARTICIPATED IN THE SURVEY?

The 35 respondents are directors, deans, vice presidents, and provosts at U.S. higher education institutions of various sizes, Carnegie classifications, affiliations (public/private), and geographic locations.



ACKNOWLEDGEMENTS

We would like to thank all higher education professionals for contributing to our study. We would also like to acknowledge the following experts for agreeing to be mentioned in this report:

Brian Bava, Dean of Enrollment, The College of Idaho (ID)

Colleen Flynn Thapalia, Director, International Recruitment & Admissions, The College of Saint Rose (NY)

Dan Meyer, Vice President for Admissions, DePauw University (IN)

Evan Nelson, Director of Graduate Admissions & Recruitment, University of North Dakota (ND)

Feroze Khan, Vice President, International Programs, Stratford University (VA)

Greet Provoost, Director, Office of International Programs, The University of Mississippi (MS)

Joanne Canyon-Heller, Assistant Provost for International Academic Programs & Summer Sessions, Roosevelt University (IL)

Lloyd Scott, Director of Admissions, Appalachian State University (NC)

Mark Gould, Associate Vice President, International Enrollment Management, Merrimack College (MA)

Maya Suraj, Director of Admissions, Illinois Institute of Technology (IL)

Interested in participating in future WES research on international enrollment trends as an expert? Please email your interest to Yoko Kono at ykono@wes.org

References and Notes

1. Kiley, K. (2013, January 17). Nowhere to turn. *Inside Higher Ed*. Retrieved from <http://bit.ly/V9kJCd>
2. Choudaha, R. (2012, December 9). Need to prepare for the next wave of foreign students. *University World News*. Retrieved from <http://bit.ly/YQNbdC>
3. UNESCO Institute for Statistics. (2012). *Global Education Digest 2012*. Retrieved from <http://www.uis.unesco.org/Education/Pages/global-education-digest.aspx> International students are defined as those who have crossed a national or territorial border for the purpose of education and are now enrolled in institutions outside of their country of origin.
4. The U.S., UK, Australia, and Canada, accounted for more than two-fifths (40.3%) of all international students (UNESCO 2012). By contrast, almost one-half of international students (47.8%) chose to study in one of these four destinations in 2004 (UNESCO 2006, 2007). The joint market share diminished in part because other destinations, such as Germany, are also becoming serious competitors to the big four above.
5. According to the report published by China Education Online (EOL), the number of Chinese students who studied abroad in 2012 was estimated to total 400,000—60,000 more than 2011. 380,000 students were self-funded in 2012. See more at <http://www.eol.cn/html/lx/report2012>
6. Saudi Gazette. (2012, January 29). 50,000 Saudis to graduate from top 500 universities by 2020. Retrieved from <http://bit.ly/NUwPYL>
7. U.S. Department of Homeland Security, Immigration and Customs Enforcement (ICE). (2012). *Student and Exchange Visitor Information System (SEVIS) General Summary Quarterly Review For the Quarter Ending September 30th, 2012*. Retrieved from https://www.ice.gov/doclib/sevis/ppt/quarterly_rpt.ppt
8. We use data from government agencies of each country which define international students differently. Deviation from this definition of international students will be noted, where appropriate, throughout the article.

U.S.: Institute of International Education. *Open Doors Report on International Educational Exchange*. International students are primarily on student (F) and exchange visitor (J) visas and studying in U.S. higher education institutions. Retrieved from <http://www.iie.org/opendoors>. We use the Integrated Postsecondary Education Data System (IPEDS) to collect enrollment information on undergraduate degree/certificate-seeking students at four-year public and private degree-granting institutions in the U.S., where the number of reporting institutions summed up to 2,645 for fall 2003 and 3,025 for fall 2011. Retrieved from <http://nces.ed.gov/ipeds/datacenter/>

UK: Higher Education Statistics Agency (HESA). The population used for this enquiry is based on the above Standard Registration Population, which was introduced from 2007/08 and excludes sabbatical and writing up students. It includes full time and part time students at undergraduate (first degree and other undergraduate) and graduate (postgraduate taught and research) levels. International students are non-UK-domicile students whose permanent/home address is out of UK prior to the start of their studies. We use number of first degree undergraduate as bachelors' equivalent. Figures are subjected to HESA standard rounding. Retrieved from <http://www.hesa.ac.uk/>

Australia: Department of Education, Employment and Workplace Relations (DEEWR) Higher Education Statistics based on the student data collections. Data show enrollment at undergraduate (bachelor and undergraduate other) and postgraduate (postgraduate research and other) only, therefore excluding enabling and non-awarding courses. Overseas students are those who are not citizens of Australia or New Zealand, permanent residents, or on a humanitarian visa. Due to the academic calendar in Australia, enrollment number refers to the academic calendar one year prior to the reference year shown in the figure. Retrieved from <http://innovation.gov.au/HigherEducation>

Canada: Statistics Canada (SC). *Postsecondary Student Information System (PSIS)*. Population includes those studying at public postsecondary institutions for short general, career, technical or professional education or equivalent, general, career, technical or professional education or equivalent, 1st cycle education or equivalent, 2nd cycle education or equivalent, 3rd cycle education or equivalent and other education programs. 1st cycle

- education or equivalent is used as proxy for bachelors' enrollment. International students are those who study in Canadian institutions but are not Canadian citizens or permanent residents based on their immigration status. Retrieved from <http://www.statcan.gc.ca/>
9. Chang, L. (2012). Is there a new wave of Indian undergraduate students heading to the U.S.? *World Education News & Reviews*, 25(6). Retrieved from <http://www.wes.org/ewenr/12july/mobilitymonitor.htm>
 10. Source countries were selected and ordered based on the number of international undergraduate students in 2011/12 excluding OPT and non-degree students.
 11. According to SEVIS quarterly review, business was the most popular major among international students between 2007 and 2012. As of September 30th, international students enrolled in business, management, and marketing studies increased by 39 percent from 138,289 in 2007 to 192,628 in 2012. See more at http://www.consularassistant.org/info/SEVIS_quarterly_report_sept07.pdf; https://www.ice.gov/doclib/sevis/ppt/quarterly_rpt.ppt
 12. Data is from U.S. Department of Homeland Security, U.S. Immigration and Customs Enforcement, SEVIS database, special tabulations (2010). Table 2-7, Table 2-14, 2-24. National Science Board. (2012). *Science and Engineering Indicators 2012*. National Science Foundation (NSB 12-01). Retrieved from <http://www.nsf.gov/statistics/seind12/c2/c2s2.htm>
 13. See more about the popularity of business programs at Zhang, Y. (2012, April 7). 90% of China's super-rich want to send children abroad. *International Business Times*. Retrieved from <http://bit.ly/XobXyj>
 14. Due to varying data availability, not all host countries report figures for 2004 and 2012.
U.S.: IPEDS. Number refers to the share of international students, defined as non-resident alien undergraduate degree/certificate-seeking students, in Business Management and Administrative Services (Category 52.0000) programs. We used enrollment data from fall 2002 and fall 2011 where 2,677 and 2,932 four year degree-granting institutions, respectively, were selected from the database.
UK: HESA special data tabulation. Business field refers to Group N Business & Admin studies.
Australia: DEEWR. Business field refers to Management and Commerce programs.
Canada: SC. Business field refers to Business, Management, and Public Administration.
 15. Enrollment was calculated based on the distribution of international students by fields of study and country of origin. The number is rounded to the nearest hundred. See more at IIE. (2012). *Open Doors Report on International Educational Exchange*. Retrieved from <http://www.iie.org/opendoors>
 16. See more about the mean score of TOEFL iBT test takers at Educational Testing Service. (2012). *Test and Score Data Summary for TOEFL iBT® Tests and TOEFL® PBT Tests*. Retrieved from http://www.ets.org/s/toefl/pdf/94227_unlweb.pdf
 17. Segmentation is a powerful tool that offers information about the demographics and aspirations of potential students and how these unique characteristics are associated with certain patterns of behavior. See more at Yankelovich, D. & Meer, D. (2006, February). Rediscovering market segmentation. *Harvard Business Review*. Retrieved from <http://buff.ly/X9Fw75>
 18. Choudaha, R., Orosz, K., & Chang, L. (2012). Not All International Students Are The Same: Understanding Segments, Mapping Behavior. World Education Services. Retrieved from <http://www.wes.org/ewenr/12aug/feature.htm>
 19. Fernandez, K. (2011, September/October). Making the numbers work. *NAFSA International Educator*. Retrieved from <http://bit.ly/U6nfg7>

ABOUT THE AUTHORS



**Rahul Choudaha,
Chief Knowledge Officer & Senior Director of Strategic Development**

Rahul earned a Ph.D. in higher education from the University of Denver, a master's degree in management from NITIE, Mumbai and a bachelor of engineering degree from Jabalpur University, India.

Contact: rahul@wes.org



Li Chang, Research Associate

Li earned a master's degree in education policy and social analysis from Teachers College, Columbia University, and a bachelor's degree in Chinese language teaching from East China Normal University, China.

Contact: lchang@wes.org



Yoko Kono, Research Associate

Yoko earned a Master's degree in International Comparative Education from Stanford University and a Bachelor's degree in Social and Behavior Sciences from Soka University of America.

Contact: ykono@wes.org

ABOUT WES RESEARCH & ADVISORY SERVICES

[WES Research & Advisory Services](#) offers research-based consulting solutions on student mobility, international enrollment, and transnational education. As the largest non-profit credential evaluation service in the U.S., WES has a deep understanding of global higher education, at both the institutional and student level, and 40 years of data on U.S.- and Canada-bound international students. With exclusive access to this data and knowledge, WES is uniquely positioned to help you reach your internationalization goals. To discuss engagement opportunities, please contact: ras@wes.org

For more information on WES Research & Advisory Services, please [download our information flyer](#).


ABOUT WORLD EDUCATION SERVICES

[World Education Services](#), Inc. is the largest non-profit credential evaluation service in North America and a leading provider of research on student mobility, international enrollment management, and transnational education. Established in 1974, WES is celebrating 40 years of helping people with international education achieve their educational and professional goals by evaluating and advocating for the recognition of international education qualifications. WES has delivered credential evaluation reports to nearly 1 million individuals and over 2,500 educational, professional, and governmental institutions worldwide.



Contact Us:

 wes.org/RAS

 212-219-7317

 ras@wes.org

World Education Services is a not-for-profit organization whose mission is to foster the integration of internationally-educated persons into academic and professional settings.

Find us on [Facebook](#), [LinkedIn](#), and [Twitter](#)

Tweet us with any questions and comments online by using #WESresearch

[Click here](#) to subscribe to our newsletter



WORLD EDUCATION SERVICES
WES RESEARCH & ADVISORY SERVICES
P.O. Box 5087
Bowling Green Station
New York, NY 10274-5087 USA