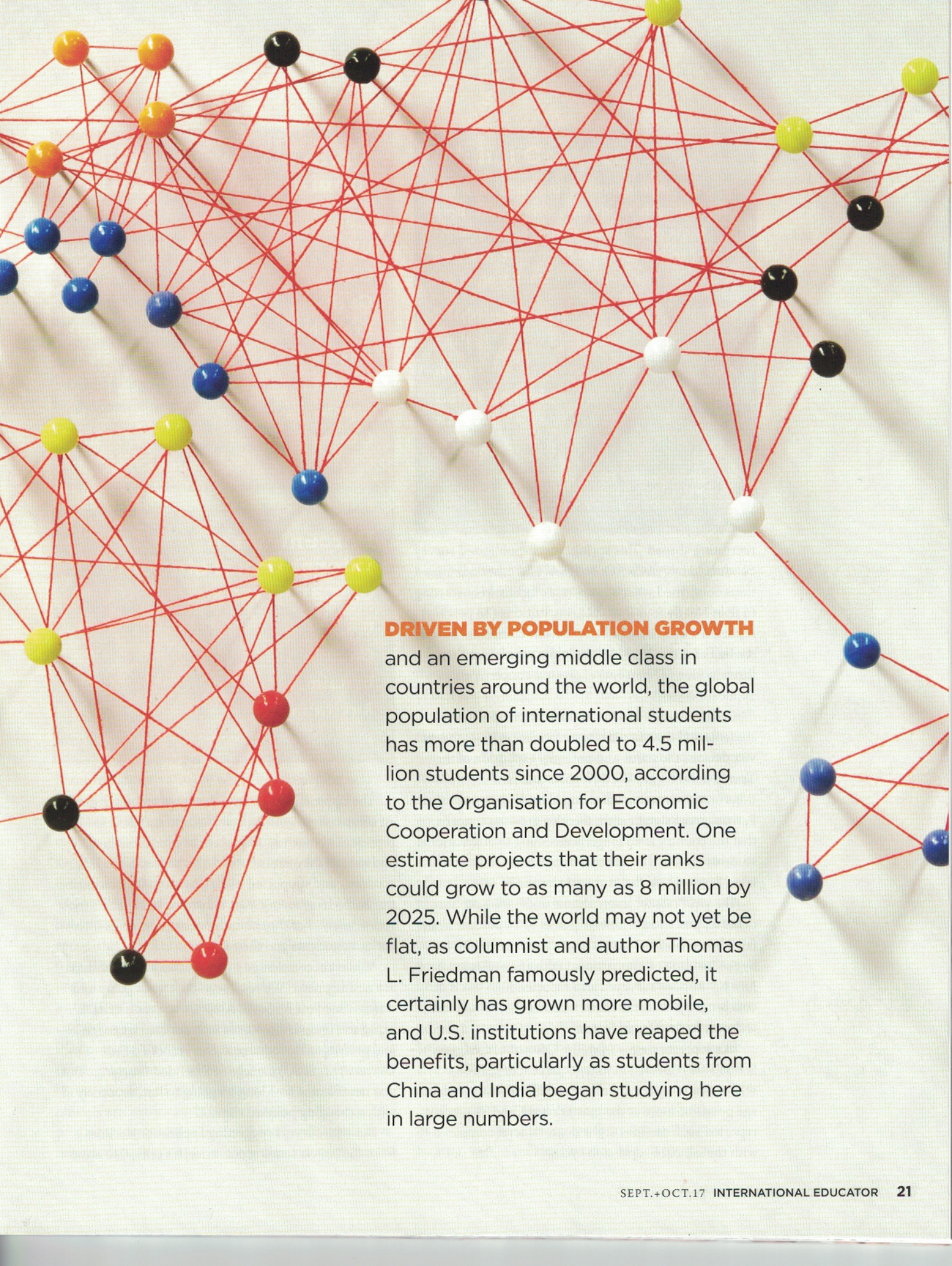


# More Mobility, More Competition


*U.S. institutions are leveraging  
new strategies and solutions  
to meet newly emergent  
recruiting challenges*

BY MARK TONER



### **DRIVEN BY POPULATION GROWTH**

and an emerging middle class in countries around the world, the global population of international students has more than doubled to 4.5 million students since 2000, according to the Organisation for Economic Cooperation and Development. One estimate projects that their ranks could grow to as many as 8 million by 2025. While the world may not yet be flat, as columnist and author Thomas L. Friedman famously predicted, it certainly has grown more mobile, and U.S. institutions have reaped the benefits, particularly as students from China and India began studying here in large numbers.



But even as overall numbers have grown, the U.S. share of internationally mobile students has fallen from 28 percent in 2000 to 22 percent in 2014, as countries like China, Australia, and Canada emerged as new international hubs (see tables at right). Moreover, many institutions focused their efforts on the largest sending countries, to the detriment of developing farther-reaching global pipelines of prospective students.

Coupled with international students' concerns over the White House's efforts to block travel to the United States by certain nationals of Iran, Libya, Somalia, Sudan, Syria, and Yemen, the net result for U.S. institutions is a newly challenging recruiting environment—one in which they will need to leverage all of their competitive advantages to meet their enrollment goals and sustain their global preeminence.

The Trump administration's travel ban, rhetoric from the president and administration officials, and subsequent headlines in global media have created particularly stiff headwinds for U.S. institutions recruiting abroad. This spring, a well-publicized survey conducted by AACRAO, NAFSA, and other organizations confirmed what admissions officials were starting to fear: Nearly four in 10 U.S. institutions (38 percent) reported a drop in applications from international students for the 2017–18 academic year. More than three in four (77 percent) expressed concerns about application yield.

Concerns voiced to institutions by prospective students and their families were familiar ones—student visa denials, the status and potential expansion of the Trump administration's travel ban, and new restrictions on travel, reentry, and employment opportunities. Perhaps most significantly, there's a growing concern that the country is no longer welcoming to international students, and in the case of students from some countries, a perception that it may no longer be safe.

The yield rate for international undergraduate students dipped two percentage points to 24 percent from fall 2016 to fall 2017, according to a survey conducted by the Institute of International Education released in July. Institutions surveyed also reported high levels of concern from students about whether they would feel welcome in the United States.

In a separate survey from the Council of Graduate Schools also released in July, 46 percent of graduate school deans reported yield rates falling by two percentage points or more at the master's level, and 31 percent reported such declines at the doctoral level compared with the fall 2016 admission cycle.

## Share of internationally mobile students in 2014

<b>U.S.</b>	28% ↓
<b>UK</b>	11% (unchanged)
<b>China</b>	8% ↑
<b>Germany</b>	7% ↓
<b>France</b>	7% (unchanged)
<b>Australia</b>	6% ↑
<b>Canada</b>	6% ↑
<b>Japan</b>	3% (unchanged)
<b>Other</b>	30%

Source: IIE/Project Atlas, 2016

## Percentage of international students on campuses

<b>U.S.</b>	5%
<b>Canada</b>	10%
<b>Britain</b>	15%
<b>Australia</b>	25%

Source: Economist.com (2014-15 figures)

The ripple effects of these declines can be substantial: At some colleges and universities, international students represent as much as 10 percent of overall budgets, and in total they contributed \$32.8 billion to the U.S. economy and supported more than 400,000 jobs during the 2015–16 academic year, according to NAFSA's most recent analysis of the economic contributions of international students and their families.

While unprecedented in scope, these kinds of shifts are nothing new. "We've all seen the trends go up and down—one year it's Saudi Arabia, one year it's Brazil," says Saroj Quinn, director of international language and professional programs at San Francisco State University's (SFSU) College of Extended Learning. "But you never know how long it's going to last, especially with a changing political climate."

But with surveys suggesting application declines from the largest sending countries, it's critical to attract

students from the broader world. “When 70 percent of your revenue is coming from two countries, you’re in a dangerous place,” says Raymond Lutzky, managing director of graduate enrollment management and admissions for New York University’s (NYU) Tandon School of Engineering. “From a risk management standpoint, you have to diversify your bottom line.”

Small wonder, then, that institutions are expanding recruiting efforts to the far corners of the globe—as far as Nepal and Kazakhstan, among other places. “The reasons to diversify are myriad, and the reasons not to are nonexistent,” says Paul Schulmann, research manager of World Education Services. But the ways in which institutions go about doing so can shape the impact on their bottom line—as well as on the cultural, educational, and social experience that they promise their students.

“In a lot of respects, an institution’s true colors are revealed when they are suddenly faced with changes in where these students are coming from,” says Martin A. Bennett of Social Media and International Education Consulting.

### **PATTERN RECOGNITION**

To be sure, the current political climate in the United States is taking a toll. Institutions responding to the AACRAO/NAFSA survey reported the highest declines in applications from the Middle East, who make up around 10 percent of the total U.S. international student population and are most directly affected by the current administration’s proposed travel ban. Many institutions also are reporting similar impacts among applications from China and India, which together make up nearly half of international enrollment in the United States. And survey respondents suggest that concerns are felt to varying degrees around the globe (see table at right).

For the United States, the past is prologue. A highly publicized shooting of two Indian nationals in Kansas earlier this year has contributed to application declines from that country, much as a similar violent incident previously impacted Indian applications to Australian institutions. Like the United States, the United Kingdom saw reduced numbers of students applying from beyond the European Union after it implemented more restrictive immigration measures and is now facing a potential “Brexit shock” with EU applicants. And admissions officials are well aware of how changes in scholarship programs administered by Brazil and Saudi Arabia have impacted applications from those two countries. But the

## **Global Concern**

**Students and families from around the globe report concerns about attending college in the United States, with areas targeted by policy and rhetoric showing the largest number of concerns:**

<b>Middle East</b>	<b>79%</b>
<b>India</b>	<b>46%</b>
<b>Asia</b>	<b>36%</b>
<b>Latin America</b>	<b>34%</b>
<b>Africa</b>	<b>26%</b>
<b>Europe</b>	<b>18%</b>

**Source: Trending Topics Survey: International Applicants for Fall 2017—Institutional & Applicant Perceptions AACRAO/NAFSA, 2017**

bigger challenge is to look beyond what’s already happened and identify the broader trends.

“Patterns are just that—patterns, the trail that’s left behind,” says John Wilkerson, director of international admissions at Indiana University-Bloomington. “Part of the rub with admissions and enrollment is getting ahead of that and finding out where the trail is going.”

Some elements of that trail can be discerned through the actions of growing hubs of international education, including the aspirations of some of today’s largest sending nations (see box, p. 26). Others reflect evolving individual student preferences, including the growing emphasis on shorter-term or more regional programs among students in Asia and elsewhere.

Quinn has experienced these trends on both sides of the Pacific. While working for the City University of Hong Kong, the institution targeted South Africa as a promising source of international students because of business connections between the two regions and a weaker currency that put other English-speaking institutions out of financial reach for many students. Now at San Francisco State, Quinn is taking advantage of the growing interest in short-term study abroad programs among Asian students by developing a summer intensive English program focused on the culture, business, and history of San Francisco.

The pilot SF Discover program takes advantage of the city’s appeal as a gateway to Asia and SFSU’s location within walking distance of tech companies



such as Twitter. As the program evolves, Quinn hopes it will attract partnerships with universities sending large groups of students. “It’s a response to the need to develop more short-term programs, not just degree-seeking opportunities,” she says.

Students across the world also are increasingly interested in collaborative degree programs that provide credentials from both a U.S. institution and one in their home country. At NYU’s Tandon School of Engineering, a 4+2 partnership with a leading private institution in Chile, for example, offers students from that country a five-year engineering licensure at the end of their first year at Tandon and a NYU master’s degree the following year. SFSU and other California State University system institutions are also offering single-semester study abroad program for international students whose home institutions may not have exchange partners.

“Students are becoming more savvy in what they’re looking for,” Quinn says. “They really want to know there’s a reason they’re spending more money to go overseas.”

### **BURSTING THE BUBBLE**

Like many large, nationally ranked universities, Indiana University-Bloomington saw its international student population grow over the years in large part due to an influx of Chinese students—one which Wilkerson readily calls “a bubble.”

While growing numbers of students across the globe are seeking international study opportunities, that diversity isn’t always seen on U.S. campuses. “Even though you see growing numbers of international students, you’ve unfortunately seen a homogenization of international student bodies,” says Schulmann. “It’s been easy to ignore the need to diversify the portfolio of countries you are recruiting from when you see your numbers increasing, but when you see more than 50 percent of international students coming from two countries—and even more at the graduate level—you’re going to start seeing the ramifications of a lack of diversity.”

At IU-Bloomington, officials opted to get ahead of the Chinese bubble several years ago. “Understanding that there’s going to be some level of right-sizing that will occur in that population, we’ve developed strategic plans to ensure we’re engaged on every inhabited continent,” Wilkerson says.

Today IU-Bloomington visits more than 60 countries a year in search of prospective students. Campus

## **Data Points for Diversification**

As part of its strategic plan to diversify its international student population, Indiana University-Bloomington monitors international mobility closely. Among the data points it examines:

- Economic indicators, especially signs of sustainable growth of the nation’s middle class
- Education infrastructure, policies, and aggregate/per-capita spending on education
- Demographics, including age breakdowns and secondary attainment rates
- Cultural influences on mobility, including prevalence of language training and past history of study abroad

officials have rethought scholarship models, admissions practices, and how they take local context into consideration when evaluating academic performance. Looking to the incoming 2017–18 class, Chinese students still make up the lion’s share of international students, at around 60 percent, but the number of countries represented has increased by 20 percent to around 130, according to Wilkerson.

“Our fastest growing demographic is now international students outside of China, India, and Korea,” Wilkerson says. “We’ve seen growth in international applications, admissions, and deposits while simultaneously managing a decline in applications and admissions from China.”

The Indiana campus’s experience is encouraging but challenging to replicate, particularly for resource-strapped international offices facing the specter of reduced enrollments. “The real rub for universities is how much they’re willing to invest now in maintaining their presence in countries that have been traditionally strong for them, while also looking at ways to expand the range of countries where they do draw students.” Bennett says.

### **STRATEGIES THAT WORK**

Strategies to diversify international student populations defy easy answers. “There’s no simple one-sentence

answer to diversification,” says Schulmann. But there is a two-word approach for how to get started: know thyself, or at least your institution.

“Take stock of what your institution has to offer and match the realities of life on campus with what students in different parts of the world are looking for,” Schulmann advises. “Your institution might be a perfect match for a Nigerian student or a budget-conscious Indian student who could get into a top institution. It behooves institutions to use their marketing and recruiting budgets to go after the students that offer the best fit.”

This advice may sound painfully familiar to admissions officers versed in efforts to attract domestic U.S. students, but there are unique wrinkles to global recruitment strategies. Among them:

**Doubling down.** Just because applications are down in China and India today, or other countries tomorrow, doesn't mean that recruitment efforts there should be abandoned—just adapted. In some places, this may mean being more realistic about which students to

target, particularly given the increase in denials of visas for conditional admission in some countries. In other cases where national scholarship programs have been curtailed or changed, funding for prospective students may still be available through partnerships with universities or business consortia. “It decentralizes the process,” Bennett says. “These countries aren't going to dry up overnight, but universities are going to have to work a lot harder to get those students.”

**Take an evidence-based approach.** Don't follow trends or hunches about the newest sources of potential students—study the numbers. “Patterns are helpful, but forward vision requires analysis and a lot of data collection,” Wilkerson says.

Along with NAFSA and other international organizations, the International Monetary Fund, World Bank, and other multinationals are invaluable resources for tracking emerging demographic trends and other data (see For More Information box on p. 28).

**Emphasize access.** Depending on the country and the students being targeted, “access” may mean



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## Global Rivals

**AUSTRALIA.** With one in four college students from abroad, education is Australia's second-largest export industry, according to the *Economist*. International enrollment exceeded a record 554,000 in 2016.

**CANADA.** On top of 83 percent growth in international enrollment between 2008 and 2015, Canadian institutions are reporting significant increases in foreign applications—20 percent to 30 percent in many cases—for 2017-18.

**CHINA.** Enrolled a record 440,000 international students in 2016, up 11.4 percent from the previous year. China is now ranked second behind the United States in the number of institutions in the top 500 of ShanghaiRanking Consultancy's Global Ranking of Academic Subjects (54 vs. 137).

**UNITED KINGDOM.** A decline in students from outside of the European Union in the wake of more restrictive immigration policies has since stabilized, but Brexit concerns contributed to a projected 7.5 percent decline

in applications by EU students for 2017-18.

**JAPAN.** International enrollment increased 14.8 percent in 2016 to nearly 240,000. Japan wants to increase foreign students to 300,000 by 2020—a 60 percent increase.

**GERMANY.** Following in the footsteps of other European countries by offering more programs in English, Germany is within 10,000 students of its 2020 goal of 350,000 international students.

**FRANCE.** Still a top-ranked destination with more than 300,000 foreign students in 2015-16, France's market share continues to decline as other countries' grow more quickly.

**INDIA.** Emphasis on improving institutional quality and concerns about studying abroad are leading to significant increases in domestic applications. The 20,000 international students in Indian institutions in 2012-13 represent a fraction of the more than 200,000 Indians who study abroad.

Sources: ICEF, media reports

redirecting scholarship funds. It also may involve progressive admission evaluation methods that recognize that not all students have equal access to language or entry test preparation.

**Seek support from the administration.** College leaders are well aware of the financial benefits international students bring, but they also can articulate the intrinsic benefits of a global student population—and provide the resources needed to diversify recruitment efforts.

**Know your prospective students.** Chinese students tend to be highly focused on rankings. So, too, are Saudi students, following changes in that country's scholarship program. Indian students may be more likely to make decisions around career prospects, so an emphasis on internships, success stories, and alumni is key.

**Be realistic.** An honest assessment of strengths and weaknesses can be difficult. "If you have a good

engineering program that is not situated in terms of rankings, then don't go to countries where students make all decisions based on rankings," Schulmann says. "Look instead at countries where students are less financially resourced and more willing to come."

**Communicate.** It's critical to remind prospective students that the United States isn't what they hear in the news. "Universities are a welcoming place, and they need to put forth that message," Schulmann says. At the same time, "it's important not to deny what's going on and minimize people's concerns," he adds. "Honesty is important."

**Join forces.** Individual institutions may have little sway over national policy, but together they can send a powerful message. More than 100 university presidents signed an open letter opposing the travel ban, and the You Are Welcome Here campaign followed similar post-Brexit efforts in the United Kingdom. Such efforts also can be local: In Philadelphia, institutions worked

together to market the city as welcoming to international students.

**Partnerships.** Foreign institutions and consortia provide opportunities to develop customized pathways such as 2+2 or 4+2 programs. Doing so offers a pipeline of qualified students, but it also requires a significant investment—including the in-person visits required to develop personal relationships among institutions and financial support. “Don’t just write a MOU, guarantee scholarship aid,” Lutzky says, calling the strategy “*becas y besos*—scholarships and kisses.

**Leverage alumni.** Alumni can tell more powerful stories than representatives or agents, and younger alumni can serve as a credible social media source. Check whether the alumni office tracks international alumni by country and can help make connections.

**Rethink agent relationships.** While still controversial among U.S. institutions, agents remain a trusted source of information for students in much of the world. Agents, too, are also increasingly working to recruit cohorts of students, providing a potential alternative to developing direct partnerships with feeder institutions abroad.

**Create supports.** Institutions that make the effort to support international students in difficult times, such as during the chaotic first weeks of the travel ban, may reap the benefits through word of mouth. “It’s one thing to have marketing collateral and recruiting, but at the end of the day, your best marketing collateral is your international

students,” Schulmann says. “And when they have good experiences, they’re going to share those experiences.”

**Be patient.** If entering a new country for the first time, don’t expect an immediate uptick in enrollment. “It’s a three- to five-year commitment to build a presence and a brand in that country,” Bennett says. “Institutions cannot expect families to commit without having an opportunity to get to know you.”

## BEYOND THE NUMBERS

Like many graduate programs in STEM fields, the student body at NYU’s Tandon School of Engineering is predominantly international—up to 85 percent of its student body is from overseas. Like other institutions, Tandon is working to diversify its international student population for reasons that go beyond the numbers.

In focus group conversations, “the Chinese students said that their Mandarin improved while they were at NYU,” Lutzky says. “We don’t teach Mandarin. When they learn the classroom is entirely Chinese, it changes their perception of the institution. They want diverse classrooms too.”

So like other programs, Tandon is focusing increasingly on Latin America, the second largest sending market outside of Asia. “There’s no silver bullet to reproduce the same kinds of numbers out of Latin America as Asia,” says Lutzky. “There’s considerable groundwork to be done.”

To create pathways, Tandon has entered partnerships with a leading Columbian university and a consortium of businesses that provide support for employees seeking graduate degrees at NYU; similar programs are in the works in Honduras and elsewhere in the region.

But there’s a catch. While such programs can create new pipelines of students, they often rely on elite institutions and businesses that in turn draw from small slices of the country’s population. And exclusivity works both ways—even in emerging countries, leading institutions and business consortia may only want to work with highly ranked U.S. institutions.

“I always remain concerned about facilitating class divide by education,” Lutzky says. “Otherwise we’re matching elites with elites.”

Equally important is that the emphasis on diversification on U.S. campuses doesn’t end with enrollment numbers. “What happens to those international voices when we bring them to campus?” Wilkerson asks. “We can answer some of that in admissions and enrollment management, but what’s happening within the classroom? Is the international voice not only being respected, but also being sought out?” ■

## FOR MORE INFORMATION:

- AACRAO Trending Topics Survey: International Applicants for Fall 2017 Key Findings <http://www.aacrao.org/docs/default-source/TrendTopic/Immigration/intl-survey-results-released.pdf?sfvrsn=0>
- ICEF Monitor Country Reports <http://monitor.icef.com/category/country-reports/>
- IIE Open Doors International Students Leading Places of Origin <https://www.iie.org/Research-and-Insights/Open-Doors/Data/International-Students/Leading-Places-of-Origin>
- NAFSA International Student Economic Value Tool [http://www.nafsa.org/Policy\\_and\\_Advocacy/Policy\\_Resources/Policy\\_Trends\\_and\\_Data/NAFSA\\_International\\_Student\\_Economic\\_Value\\_Tool/](http://www.nafsa.org/Policy_and_Advocacy/Policy_Resources/Policy_Trends_and_Data/NAFSA_International_Student_Economic_Value_Tool/)
- U.S. Department of Commerce 2016 Top Markets Report: Education [http://trade.gov/topmarkets/pdf/Education\\_Executive\\_Summary.pdf](http://trade.gov/topmarkets/pdf/Education_Executive_Summary.pdf)
- World Education Services World Education News & Reviews <http://wenr.wes.org/>