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Trends in International Student Mobility

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05

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03

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

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02

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the Same

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

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Mobility Monitor

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

Executive Summary

A new environment of budgetary cuts and increasing competition is forcing many institutions to become strategic and deliberate in their recruitment efforts. Effective international recruitment practices are dependent more than ever on a deep understanding of student mobility patterns and decision-making processes. 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.

Based on our analysis, we found the following key trends and patterns of international student mobility:

- Although the country's share of globally mobile students has declined over the last decade, the U.S. is likely to consolidate its leadership position due to the sheer size of its higher education system and its ability to absorb international students at a higher rate when compared to competitor countries.
- While China and India are still too big to ignore, there are other emerging countries worth paying attention to, including Saudi Arabia, Vietnam, Mexico, and Brazil. Recruitment to these countries should also be cultivated not only for campus diversity purposes, but also as a de-risking strategy.
- Growth in international student enrollment is not restricted to large states like California and New York; non-traditional destinations, including Montana, Oregon and Colorado, are also witnessing significant growth due to more aggressive institutional outreach efforts and state policy reforms that allow for the enrollment of more international students in public institutions.
- Enrollment growth at the Bachelor's level is set to outstrip growth at the Master's and Doctoral levels. Since international students studying at the Bachelor's level are typically funded by their families, as opposed to financial aid, and provide a longer stream of revenue (four years) versus Master's programs (two years), some public institutions are viewing this trend as a solution to current fiscal challenges.
- English as a Second Language (ESL) programs are emerging as an important pathway for international students, most notably from Saudi Arabia. The availability and length of Optional Practical Training (OPT) will also continue to be an important factor for students heading for the U.S., most notably for Indian students.
- Given intense pressure on institutions to become more prompt and efficient in achieving their recruitment goals, the use of recruitment service providers, social media and state consortia marketing will gain momentum.

Executive Summary Continued

Current trends indicate that Fall 2012 enrollment will display a healthy growth in the U.S., not just because of the growing demand from China and Saudi Arabia, but also due to the renewed interest among Indian students and the emergence of Brazil. Concurrently, stringent immigration policies in the UK will divert some internationally mobile students to the U.S. and other destinations like Australia and Canada.

Although student mobility is expected to grow, institutions have to compete hard for talented and self-funded students. A better understanding of global mobility trends and their relationship to the applicant pipeline will help institutions channel their efforts. Institutions that are strategic, deliberate and informed in their recruitment efforts will maximize the investment in an efficient manner.

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Introduction

International student recruitment is becoming integral to the financial health of many higher education institutions worldwide, in addition to remaining an important means of attracting talent and expanding campus diversity. A new environment of budgetary cuts and increasing competition is forcing many institutions to become strategic in their international recruitment efforts; the state of California has seen severe funding cuts to public higher education, compelling even highly selective public institutions to tap into the revenue stream of international student recruitment. At the University of California(UC) Berkeley campus, the number of international freshmen enrolled in Fall 2011 increased by 50% as compared to the previous year – this translates to 196 additional international students and an expected additional revenue of \$18 million over four years.¹

However, there are many institutions that do not have the reputation of UC Berkeley and need to dedicate more time to becoming relevant in the turbulent and unpredictable world of international student recruitment. Effective international recruitment practices are dependent on a deep understanding of student mobility patterns and student decision-making processes that are a complex interplay of several variables. For example, immigration policy changes in Australia are likely to influence student mobility patterns to the U.S., yet they are beyond the control of U.S. institutions. Institutions' ability to adapt to external factors influencing international student mobility is a critical factor in successful recruitment.

The purpose of this research report is to provide a thorough understanding of the trends and issues related to international student recruitment and to help institutional leaders and administrators make informed decisions and effectively set priorities. Based on the research findings, institutions should examine the decision-making process of prospective students, experiment with various recruitment models, and adopt strategic plans to maximize the return on investment in international student recruitment.

We present this research in two primary sections. First, we provide an overview of international student mobility to four host countries – the U.S., the UK, Australia and Canada in the context of major policy reforms. Then we provide an in-depth analysis of international enrollment trends in the U.S. with emphasis on emerging recruitment practices and institutional examples supporting these trends.

Context of International Student Mobility

According to the UNESCO Institute of Statistics (UIS), the number of globally mobile students increased to 3.4 million students in 2009, up from 2.1 million students in 2002.² As FIGURE 1 shows, the four leading destination countries – the U.S., the UK, Australia, and Canada – witnessed sizable growth from 2002 to 2009. Canada saw the biggest percentage gains, with enrollments increasing by 67% (from 52,650 in 2002 to 87,798 in 2009). Canada was followed by the UK and Australia, which saw increase of 62% (from 227,273 to 368,968) and 43% (from 179,619 to 257,637) respectively. Although U.S. enrollment grew at a slower rate of 13% (from 582,996 to 660,581 students), it remained the leading destination in absolute numbers and enrolled approximately one-fifth of all mobile students worldwide in 2009.

The most recent data from the Institute of International Education (IIE Open Doors 2011) showed an increase of 4.7% (from 690,923 to 723,277) in international student enrollment in the 2010-11 academic year compared to the previous year.³

Due to increased competition and the opening of new markets, the U.S. share of international students is in fact down from 27% in 2002, a detail that has been cause for concern.

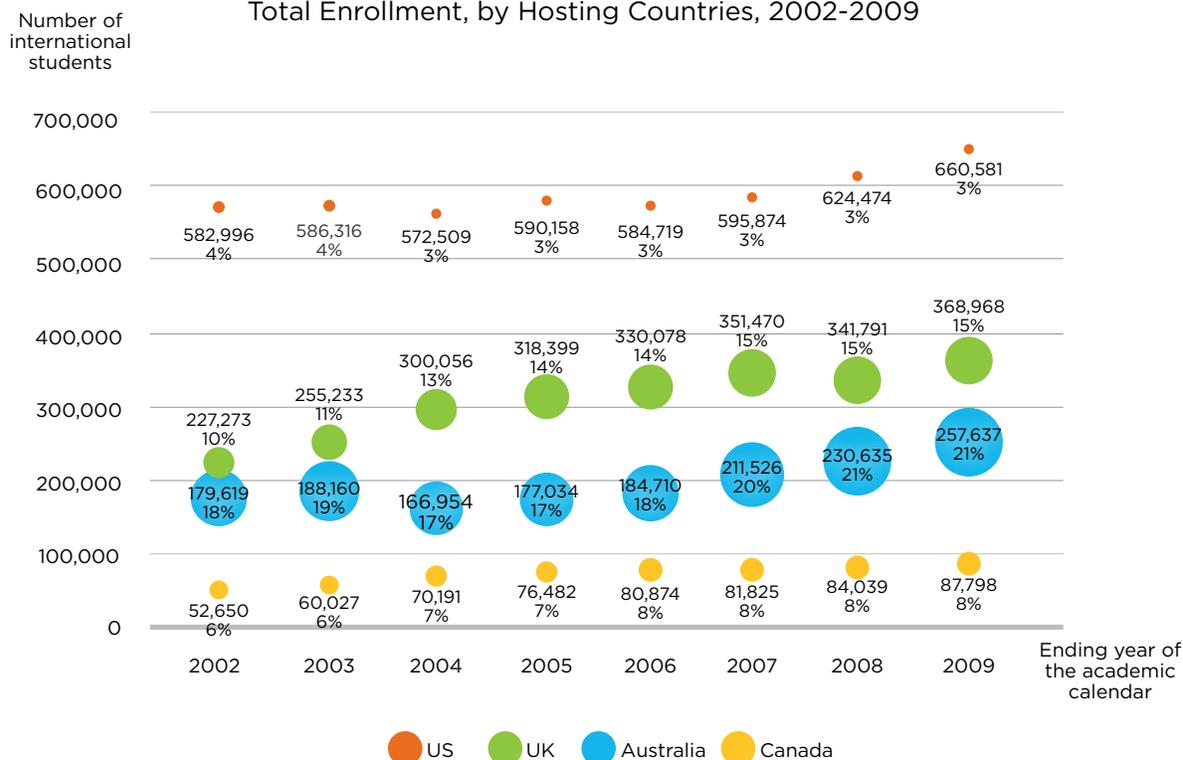
Despite the continued growth of international enrollments in U.S. postsecondary education, the country's share of globally mobile students has been steadily declining over the last decade. As noted above, the U.S. claimed 20% of the world's 3.4 million international students in 2009. However, due to increased competition and the opening of new markets, that share is in fact down from 27% in 2002, a detail that has been cause for concern for those in the U.S. who worry that the country might be losing its appeal among international students. Cost, distance, visa complexity, and competition from other popular destinations, perceived as negative influencers, threaten the ability of the U.S. to attract international students.⁴

Nonetheless, we believe that the U.S. has simply not been proactive in international student recruitment and is just now seeing opportunities to respond because of fiscal challenges. The U.S. has the potential to consolidate its leadership position due to the sheer size of its higher education system and its ability to absorb international students at a higher rate when compared to competitor countries. At the national level, the proportion of international students in the higher education system of the UK, Australia and Canada is comparatively high,⁵ accounting for 15%, 21%, and 8% respectively, in contrast to just 3% in the U.S. (see FIGURE 1).

Even at the institutional level the U.S. is much less dependent on international students to meet enrollment targets, and has a higher capacity to absorb additional international students. International enrollments at the largest 25 hosting institutions account for roughly one fifth of the total student bodies, and none have an international student population exceeding 30%.⁶ By contrast, in the UK the ratio of international students to total enrollment reached more than 50% at certain institutions. This is the case at both the University of Buckingham and Cranfield University.⁷ In Australia, institutions

such as the University of Ballarat and Central Queensland University have foreign student bodies that account for more than 60% of total enrollment.⁸ The high proportion of international students in Australia and the UK is not only an outcome of aggressive recruitment practices, including the use of agents, but is also connected to liberal changes to immigration policies in the 2000s. However, many of those immigration policies are currently being revised or reversed, leading to stricter visa regimes.

FIGURE 1:
Number and Percentage of International Students in
Total Enrollment, by Hosting Countries, 2002-2009



Source: Australia, UK, and U.S. data are retrieved from UNESCO Institute of Statistics using ISCED 5& 6 standards. Due to missing data on Canada for 2009, we used Statistics Canada from 2002-2009. Definitions of level of study are different in the two data sources; therefore, difference may emerge.

AUSTRALIA

In 2010, Australia addressed abuses of immigration incentives within its student-visa policies by tightening visa requirements⁹ for non-degree students. As a result, the Australian tertiary sector saw significant declines in international enrollment. According to Australian Education International (AEI), year-to-date international enrollment in the Higher Education sector in September 2011 remained stagnant as compared to the same period in 2010, while total enrollment in Vocational Education and Training (VET) and English Language Intensive Courses for Overseas Students (ELICOS) dropped significantly by 20% from the previous year,¹⁰ putting the future sustainability of some vocational and professional institutions in question.

Though Australia's new and more lenient requirements have only been in effect since November 2011, there is already a favorable shift in student visa applications.

Recognizing the dependency of its higher education sector on international students, the Australian government recently relaxed its student visa requirements. Though the new and more lenient requirements have only been in effect since November 2011, there has already been an upward shift in student visa applications while the number of issuances by the Department of Immigration and Citizenship (DIC) jumped dramatically in the third quarter of 2011 in the Higher Education (Subclass 573) and VET (Subclass 572) categories. The largest gains occurred among Indian students applying for VET visas, up by 127% from the same period last year.¹¹

UK

The Home Office of the UK Border Agency (UKBA) introduced a Point Based System (PBS) in 2009 and incorporated a series of additional requirements into the student visa program to mitigate the abuse of student visas for immigration purposes. Since then, higher education institutions must be granted the status of a “Highly Trusted Sponsor” through a government-approved accreditation process before they can sponsor international students for visas.

On the applicants’ side, they are now required to provide proof of English proficiency and evidence of funding from financial institutions verified by the UKBA.¹² As a result of these policy changes, 474 UK colleges had their license to recruit international students revoked by the end of 2011, leading to 4,500 student visa application refusals or withdrawals. The UKBA announced that it would further tighten its language requirement and close down the post-study work route, which allows international graduates to work in the UK for two years after their degree programs, from April 2012 onwards.¹³ Under the current visa regime, institutions of higher education in the UK are likely to face additional challenges in attracting international students in 2012.

CANADA

The size of the Canadian higher education sector is comparable to that of Australia, but Canada receives far fewer international students. However, increasingly immigrant-friendly student visa policies, combined with new and aggressive federal and provincial outreach efforts have allowed Canada to make significant gains in international enrollment in recent years. The growing appeal of Canada for international students is evidenced by recent visa statistics:¹⁴ total foreign students that entered Canada during the first half of 2011 increased by 30% from the previous year. Particular growth was seen among Indian students who increased by almost 70% from 2010 to a total entry of 6,325 students, overtaking Chinese visa holders as the largest group of international students entering Canada during that time. If this trend continues, Canada is likely to see continued increases in international student enrollment in 2012.

U.S.

Overall, U.S. institutions will likely expect another year of international enrollment growth in 2012. However, the road ahead for most U.S. institutions of higher education will not be smooth as many institutions grapple with challenges in meeting recruitment goals with limited time and tight budgets. This is where a better understanding of enrollment trends would help institutions prioritize their resources.

International Enrollment Trends in the U.S.

Based on data published by multiple agencies, and media coverage of institutional enrollment statistics, we have identified a few major international enrollment trends in the U.S, focusing on four themes: source countries, destination states, enrollment by academic level, and recruitment practices.

SOURCE COUNTRIES

Currently one in five of the world's international students is from either China or India, with more than 700,000 tertiary-level students enrolled in a higher education system outside their home country. In the U.S. alone, these two countries contributed to 84% of all increases in international student enrollment between 2000-01 and 2010-11 (IIE Open Doors 2011). While the number of Chinese students has increased at an astounding rate, the growth of Indian students has been displaying a counter-trend over the last couple of years; recent statistics by the U.S. Immigration and Customs Enforcement (USICE) show that the number of active Chinese students on F-1 or M-1 visas at the Student and Exchange Visitor Approved Schools at the end of 2011 increased by about 28% to nearly 200,000 versus the year prior, whereas Indian student numbers decreased by about 4%.¹⁵

The most commonly cited reasons for increased mobility among Chinese students are the growing supply of high school graduates whose families can afford a U.S. education and the unmet demand for high-quality education at home. By contrast, enrollment growth among Indian students has slowed considerably, possibly due to the residual effects of the U.S. economic recession - given that nearly 60% of Indian students enroll in Master's programs of Engineering and Computer Science, they are highly sensitive to the financial returns of their investment in education. However, there are signs that the slowing trend is set to reverse. The number of student visas issued to Indians in 2011 increased by 18% (from 39,958 in 2010 to 46,982 in 2011),¹⁶ suggesting renewed interest in U.S. educational opportunities.

While China and India are still too big to ignore, there are other emerging countries, including Saudi Arabia, Vietnam, Mexico, and Brazil, for which recruitment efforts should be cultivated not only for campus diversity but also as a de-risking strategy. Brazil and Saudi Arabia are especially important, due to the availability of full-freight government scholarships, which minimizes the prospective students' dependency on institutional grant and financial aid. As the 2011 USICE data show, Brazil recently climbed to the list of top 10 countries supplying international students to the U.S., while Saudi Arabia became the fourth largest source country of active students, increasing by nearly 50% compared to 2010 (see TABLE 1).

Recruitment efforts for countries such as Saudi Arabia, Vietnam, Mexico and Brazil should be explored not only for campus diversity purposes, but also as a de-risking strategy versus an overdependence on the Chinese and Indian markets.

TABLE 1:
Change in Total Active Students by Country of Origin, 2010 and 2011

COUNTRY	2010	2011	CHANGE OF 2011/2010
All	799,581	858,180	7.33%
China	153,312	196,857	28.40%
South Korea	105,696	104,908	-0.75%
India	103,760	99,316	-4.28%
Canada	30,803	30,779	-0.08%
Saudi Arabia	29,391	43,910	49.40%
Japan	28,805	27,188	-5.61%
Taiwan	27,046	25,918	-4.17%
Vietnam	17,116	18,044	5.42%
Mexico	15,660	16,777	7.13%
Nepal	13,353	*	NA
Brazil	*	14,378	NA

Source: SEVIS Quarterly Review December 2011 * Data not reported in that year.

Institutional Case Studies 1: Recruiting Beyond China & India

To diversify international population, several universities in Ohio recruited students from less-sought-after countries. In 2011, Ohio Wesleyan University recruited the institution's largest number of first-year international students from Pakistan and Vietnam to date.

Source: [OSU strives for global student diversity | The Columbus Dispatch](#)

St. Cloud State University reported Nepal as the institution's largest source country, with Sri Lanka as the fifth.

Source: [SCSU international students from Nepal top list | St. Cloud TIMES | sctimes.com](#)

University of Oklahoma reported that South Korea and Vietnam are its largest two Asian source countries besides China.

Source: [OUDaily.com | OU sees Asian enrollment hike](#)

EMERGENCE OF NEW DESTINATION STATES

Traditional study destinations such as California, New York, Texas, Massachusetts, Washington D.C. and Illinois continue to be the most popular destinations for international students in the U.S. With more aggressive institutional outreach effort, states such as Delaware (+27%), Oregon (+19%), Arkansas (+18%), Alaska (+17%), and South Dakota (+15%) all saw impressive rates of growth from 2009-10 to 2010-11 (IIE Open Doors 2011). The shift is driven by a new generation of international students who are considering a wider range of options, in addition to an increasing number of U.S. institutions that are proactively recruiting international students.

The emergence of new destination states may also be attributed to state-level policy changes; public universities in Colorado can now recruit more international students because a state law capping the share of out-of-state students at one-third of total enrollment has been changed. The modified law excludes international students from the out-of-state cap, allowing public institutions to increase international enrollment (see INSTITUTIONAL CASE STUDIES 2).

Institutional Case Studies 2: Emerging Destination States

Missouri

The University of Central Missouri received a record high of international students in 2011, reaching a total of 558 and up by 16% from 2010.

Source: [Highest enrollment in UCM's 140-year history announced | digitalBURG.co](#)

The University of Missouri reported that international enrollment showed an unprecedented increase over the past five years. In Fall 2011, the international students' enrollment reached 1942 students, a 14.3% increase from 2010.

Source: [CHART: International students: Where are they from and where do they study? | Columbia Missourian](#)

Oregon

Several universities in Oregon, including *Oregon State University*, *Portland State University*, and *University of Oregon*, concurrently reported the largest-ever enrollment of international students: a total of 5,695 international students, up by 45% in 2011.

Source: [Oregon universities open today with record international student enrollment | OregonLive.com](#)

Colorado

University of Colorado, Boulder - An unprecedented overseas recruitment effort targeted at Asia and the Middle East paid off: international enrollment in Fall 2011 increased to 1,481 students, up by 9% from the previous year. Within total international enrollment, undergraduate enrollment alone reached 614 students and represented a 23% increase.

Source: [CU-Boulder sees a boost in international student enrollment | Boulder Daily Camera](#)

GROWTH AT THE BACHELOR'S LEVEL AND IN ESL AND NON-DEGREE PROGRAMS

SOARING ENROLLMENT AT THE BACHELOR'S LEVEL

One major shift in the enrollment pattern of international students is the growth of enrollment at the Bachelor's level. In 2010-11, nearly one-third of all international students in the U.S. were enrolled at the Bachelor's level (IIE Open Doors 2011). Because international students enrolled at this level are typically self-funded, with little institutional financial aid, they provide a longer stream of revenue versus the Master's programs (two years). As a result, some public institutions in the U.S. are viewing this trend as part of the solution to current fiscal challenges and therefore expanding recruitment efforts at the Bachelor's level.

The accelerated pace of urbanization and economic development in Asia will result in a larger number of households with higher purchasing power. The two heavyweights — China and India — alone will see their aggregate urban consumption increase seven-fold and six-fold, respectively, from 2005 to 2025.¹⁷ This changing landscape indicates great opportunities for higher education institutions wishing to recruit self-funded students. In 2004-05, only 8,299 Chinese studied at the undergraduate level, accounting for 14% of all Chinese degree-seeking students in the U.S. This group became seven times larger by 2010-11, translating to a total of 56,976 Chinese undergraduates who now make up 41% of all degree-seeking Chinese students in the U.S.¹⁸

Similar trends could be observed among students from Saudi Arabia: a total of 10,946 Saudi Arabian students pursued study at the undergraduate level in 2010-11, a nine-fold increase from only 1,700 undergraduate students in 2004-05. This is largely attributable to the Saudi Arabian government's commitment to sending students abroad.

USICE data help confirm this trend, showing that the number of active international students at the Bachelor's level at the end of 2011 increased by approximately 12% as compared to the previous year (see TABLE 2). Anecdotal evidence for Fall 2012 applications suggests that the increase is likely to continue. For example, recent statistics from the University of California (UC) revealed that the institution received a total of 13,873 freshman applications from international students for 2012-13 academic year, equivalent to a 66.4% increase over last year. Among all UC campuses, Berkeley, Los Angeles, San Diego, and Santa Barbara reported increases of between 50% and 103% in international applications.¹⁹

TABLE 2:
Change in Total Active Students by Level of Study, 2010 and 2011

LEVEL OF STUDY	2010	2011	CHANGE OF 2011/2010
Associate	76,616	74,175	-3.19%
Bachelor	240,282	268,186	11.61%
Master	198,792	209,367	5.32%
Doctorate	120,511	123,836	2.76%
Language training	84,529	95,015	12.41%
Secondary	33,809	39,109	15.68%

Source: SEVIS Quarterly Review December 2011

Institutional Case Studies 3: Growth at the Bachelor's Level

The University of Iowa

has seen a quadrupling of international student enrollments in the past four years. The increase is especially pronounced at the undergraduate level, where 1,736 students enrolled in Fall 2010, a dramatic 350% increase over the 2006 count of 380, and a 35% increase from 1,283 in 2010.

Source: [UI fall enrollment on par with last year; diversity increases; increase in UI international students is good for local economy | TheGazette](#)

The University of Washington

reported a significant increase in its first-year enrollment in 2011, noting that “nearly 18 percent of the UW’s freshman class is from another country, and more than half of those students are from China.”

Source: [Local News | Foreign enrollment skyrockets for UW | Seattle Times Newspaper](#)

Michigan State University

reported a “23-fold surge of Chinese undergraduate enrollment in five years, to 2,217 in 2011 from 94 in 2006. Total international enrollment almost tripled to 3,402 in the period and now makes up close to 10 percent of all undergraduates.”

Source: [Lure of Chinese Tuition Pushes Out Asian-Americans | Bloomberg](#)

GROWTH IN ESL AND NON-DEGREE PROGRAMS

The growth of total international students in the U.S. is partly attributable to two unexpected segments: Optional Practical Training (OPT) and English as a Second Language (ESL) programs.²⁰

The number of OPT students increased from 29,340 in 2003-04 to 76,031 in 2010-11. One of the reasons for this increase is linked to the extension of the OPT program from 12 to 29 months for

STEM students. Given that at least 35% of all international students in the U.S. are enrolled in STEM fields (among students from India, two out of three are STEM students), this option is particularly attractive for students studying in the U.S., especially those coming from India. It also partly explained the enrollment pattern for Indian students, where OPT numbers increased by 25% between 2009-10 and 2010-11 despite declining at all other levels (IIE Open Doors 2011).

Similarly to the OPT phenomenon, ESL programs are also emerging as an important pathway for international students. The number of students in ESL programs increased from 10,224 in 2003-04 to 29,603 in 2010-11 and soared by 24% as compared to 2009-10 (IIE Open Doors 2011). This trend is supported by current USICE data which show that the number of students participating in language training programs²¹ grew by 12% between 2010 and 2011 (see TABLE 2). This growth was largely driven by Saudi Arabian students, of whom nearly 29% were enrolled in ESL programs in 2010-11, a two-fold increase from 3,347 in 2009-10 (IIE Open Doors 2011).

Institutional Case Studies 4: Growth of ESL Programs

Portland State University

One of the seven major universities in Oregon, PSU has seen a 3.4% increase in international student enrollment. The university adopted conditional admission practices and offers ESL programs to international students. The top source country for PSU is currently Saudi Arabia (428 Saudi Arabian students were enrolled in Fall 2011), the largest supplier of ESL students to the U.S.

Source: [10 U.S. Colleges With Highest ESL Participation Rates - US News and World Report](#)
[International student enrollment at all-time high | Portland State Vanguard](#)

Arkansas State University

reported record enrollment in its ESL programs for Fall 2011. 300 newly admitted students are taking ESL and the number of international students grew from 969 to 1,073, a 10.7% increase from Fall 2010.

Source: [Arkansas State University's Fall 2011 Enrollment at All-time Record | ASU-Jonesboro](#)

Brandeis University

The student body has become increasingly diverse: international students made up 17% of the 2010 entering class, compared to only 8% four years ago. The university introduced an ESL program called "Gateway Scholars" to help international freshmen transition to American culture and college life.

Source: [ESL programs grow with international student body | BrandeisNOW](#)

EMERGING RECRUITMENT PRACTICES

The number of international students enrolled in U.S. institutions of higher education is relatively low as a percentage of overall enrollments, while there continues to be an opportunity to leverage the attractiveness of the U.S. brand. This means that many institutions are facing pressure to become more efficient in achieving their recruitment goals. In this context, we have identified three emerging international recruitment models.

RECRUITMENT SERVICE PROVIDERS

Many institutions are under fiscal pressure and time constraints to recruit international students, which partly explains why partnerships with third-party service providers, such as commissioned agents and pathways programs, are gaining prominence. However, the use of agents and expectations for quick turnaround in enrollment numbers may be coming at the expense of quality, which can be costly to the integrity of the institutional brand, and require institutions to undertake adequate measures to mitigate risks.

A recent article in the *Chronicle of Higher Education* highlighted that “[t]hrough the agents act as universities’ representatives, marketing them at college fairs and soliciting applications, there is no guarantee that colleges know the origin of the applications or the veracity of their grades and scores”.²² Australia, one of the pioneers of the agent model, noted similar concerns in the recent Knight Review of the Australian Student Visa Program, stating that “regrettably [the] expansion of nongenuine student numbers was facilitated by some agents and institutions whose business practices were highly dubious [and] sometimes illegal”.²³ Therefore it is essential for institutions to create appropriate risk management practices to ensure that the integrity of their admission processes are not compromised.

SOCIAL MEDIA AND ALUMNI ENGAGEMENT

While some institutions support the use of intermediaries like commissioned agents, disintermediation through social media offers a more credible and cost effective connectivity with prospective students with four unique advantages: relevance, speed, cost and personalization.²⁴ International alumni are also an excellent resource, not only for student recruitment (through referrals) but also in terms of their future potential for fund-raising. Many institutions lose touch with international students once they graduate but social media provides an opportunity to find and easily reconnect with international alumni.

Like any new practice, the use of social media in international recruitment poses several challenges and opportunities. However, institutions that embrace this change in an informed and entrepreneurial manner will create a significant competitive advantage.

While some institutions support the use of intermediaries like commissioned agents, disintermediation through social media offers a more credible and cost-effective connectivity with prospective students with four unique advantages: relevance, speed, cost and personalization.

STATE CONSORTIA MARKETING

Collaborative marketing through a consortium of states or universities is also emerging as an effective approach. A recent review by AEI found that “[i]n the absence of a nationally coordinated U.S. outreach effort, the idea of state-wide initiatives has rapidly spread as a cost effective way for institutions to pool their resources and efforts and enable even smaller or less well-known colleges to reach students around the world.”²⁵ The lack of a federal recruitment strategy has prompted several states to act as collaborators with local institutions to attract international students. Ohio, currently the 8th largest host state, saw a 10.5% increase in international enrollment from 2009-10, with some of this growth attributed to a variety of recruitment strategies and marketing campaigns employed at the state level.

Institutional Case Studies 5: Recruitment Practices

Recruitment Service Providers

The University of South Florida set up a joint venture with INTO corporation in the hopes of increasing international enrollment and has reported to have “[exceeded] original plan targets by 16 percent. A record 590 students from 33 countries are enrolled for Fall 2011 at the INTO USF center on the university’s Tampa campus, a 27 percent increase over Fall 2010 enrollment.”

Source: [INTO University of South Florida achieves record results : INTO](#)

The University of South Carolina announced a partnership with IDP to recruit international students in 2010. IDP’s other clients include Rutgers University, Colorado State University, and the University of Mississippi.

Source: [International Student Recruiting: University of South Carolina Joins the IDP Education Network](#)

State Consortia Marketing

Since 2002 *StudyIowa*, a consortium of universities promoting higher education in Iowa abroad, has led many recruitment initiatives to countries such as Brazil, Colombia, and Venezuela. The University of Iowa, one of the consortium members, reported that international student enrollment soared by 58% (from 2,189 in 2006 to 3,465 in Fall 2011); Iowa State University, another member of the consortium, reported its international enrollment increased from 3,327 in 2010 to 3,424 in 2011.

Source: [Colleges enrolling record number of international students – Springfield News-Sun](#)
[Increase in UI international students is good for local economy | TheGazette](#)
[Another record: Fall enrollment nears 30,000 | Inside Iowa State- Increased Diversity](#)

Social Media

Brock University illustrated a skillful use of social media in international student recruitment. It reported that “[s]ince September 2011, 443 QQ users [QQ is a popular China-based instant messaging platform] have been interested in Brock, while 1,149 are interested in Brock on Renren [the Facebook of China]. In March, Brock went from a personal to a public page on Renren, which allows it validation and a broader reach. Students seem to appreciate Brock’s accessibility and its ability to communicate with them in their own language.”

Source: [Brock uses China’s vast social media to recruit students | The Brock News](#)

Conclusion

The year 2012 is expected to be yet another growth year for international student mobility worldwide. Given that the recruitment cycle for international students is almost a year long, Fall 2012 enrollment will reflect the student-decision making processes and recruitment activities of Fall 2011 and Spring 2012.

Current trends indicate that Fall 2012 enrollment will have a healthy growth in the U.S., powered by traditional sending countries like India and China, but also by an influx of students from emerging markets such as Saudi Arabia and Brazil. International students will continue to display diversified choices of destination and will gravitate toward enrolling in English language programs and studying at the Bachelor's level. As the U.S. economy picks up, the perception of improved employment prospects will strengthen among international students, and the stringent immigration policies of the UK are likely to divert some traffic to destinations such as the U.S., Australia and Canada.

Although student mobility is expected to grow, institutions have to compete hard for talented and self-funded students, with recruitment efforts expected to be implemented in a shorter timeframe and under tighter budgets. This is where institutions need to experiment with models such as the use of social media in international recruitment. A deeper understanding of global mobility trends and their relationship to the applicant pipeline will help institutions channel their efforts. Institutions need to invest in understanding the decision-making process of their prospective students and monitor the effectiveness of their recruitment channels.

International student recruitment is an inherently complex, costly and competitive domain, which is becoming increasingly integral to the financial health of many institutions. A strategic, deliberate and informed recruitment approach will help institutions to maximize their opportunities in an efficient manner.

References and Notes

1. Number of international freshmen enrolled in Fall 2010:386, Fall 2011: 580. The tuition gap between resident and non-resident tuition (the latter charged to international students) in 2011-2012 was \$22,878. UC Berkeley (<http://bit.ly/tvVXcj>).
2. UIS defines international students as those “who have crossed a national or territorial border for the purposes of education and are now enrolled outside their country of origin.” However, other agencies sometimes use different definitions. Deviation from this definition of international students will be noted, where appropriate, throughout the article.
3. More can be found at IIE Open Doors 2011 website. <http://www.iie.org/en/Research-and-Publications/Open-Doors>
4. See Marklein, M. B. M. (2011, June 23). U.S. colleges’ appeal fading for foreign students. USA Today. Retrieved from http://www.usatoday.com/news/education/2011-06-23-internationalcollege-students_n.htm
5. The share of international students as reported by UNESCO may not fully correspond to those released by government agencies due to the difference in classifying international students.
6. International student enrollments in United States Institutions 2010-11. Australian Government Australian Education International(AEI) Research Snapshots. (November 2011). Retrieved from <http://www.aei.gov.au/research/ResearchSnapshots>
7. Number is based on the authors’ calculation using HESA data. The ratio here may be conflated to some degree, since presumably a fair proportion of students undertake program study at a global campus located outside the UK.
8. Number is based on the authors’ calculation using DEEWR data. It is noted that a sizable portion of international students are studying offshore at Australian Higher Education Providers. These students are eliminated from total enrollments and make the ratio slightly smaller than if included.
9. More changes to the Australian visa policy can be found in Key Issues Impacting on Student Visas on DIC website: <http://www.immi.gov.au/students/issues-impact-student-visas.htm>
10. Total International Students’ Enrolment in September 2011. Retrieved from Australia Government Australian Education International website: <http://www.aei.gov.au>.
11. Student visa granted in Jul-Sep 2011: Student Visa Program Quarterly Report. (September, 2011). Retrieved from Australia Government Department of Immigration and Citizenship website <http://www.immi.gov.au>
12. Summary of New Student Policy. (April 2011). UK Border Agency. Retrieved from <http://www.ind.homeoffice.gov.uk/sitecontent/documents/news/summary-student-policy.pdf>
13. See Student visa clampdown. (November 2nd, 2011). Retrieved from UK Home Office website: <http://www.homeoffice.gov.uk/media-centre/news/student-visa-clampdown>
14. Student visa statistics were retrieved from the Citizenship and Immigration Canada (CIC) website: <http://www.cic.gc.ca/english/index.asp>
15. SEVIS data define foreign students as not only those enrolled at higher education institutions but also other levels of education, such as language and trade schools.
16. More Indian students flying to us this year. (2011, October 29). The Times of India. Retrieved from http://articles.timesofindia.indiatimes.com/2011-10-29/chennai/30336414_1_indian-studentsnumber-of-student-visas-overseas-education. Data relates to U.S. fiscal year, from October 1st to September 30th of the following year.
17. McKinsey Global Institute research series. <http://www.mckinsey.com/Insights/MGI/Research>

18. Number is based on authors' calculation using data from IIE Open Doors 2011. Same for Saudi Arabian data points below. It is noted that undergraduate level subsumes the Associate's and Bachelor's programs, but country-level data do not report them separately.
19. See Fall 2012 Application Tables. (2012), Office of the President, University of California. Retrieved from <http://www.ucop.edu/news/factsheets/2012/12app.html>
20. Here, ESL corresponds to intensive English language program as defined by IIE.
21. SEVIS uses a different terminology ("language training") that broadly corresponds to the "ESL program" category used by IIE.
22. Bartlett, T., & Fischer, K. (2011, November 3). The China Conundrum. The Chronicle of Higher Education. Retrieved from <http://chronicle.com/article/Chinese-Students-Prove-a/129628/> para. 53.
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