

# 2017

## Trends in International Student Recruitment



...and beverages  
...consumption of food to "snack type foods"  
...chips, cookies etc.). Only beverages in covered  
...are allowed on board.

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# International Student Mobility

These days, there is a widespread and wide-ranging conversation about globalization; but only by visiting classrooms in every corner of the world can you see it in action. International students around the world are part of a movement bigger than themselves – a movement involving millions of people at thousands of campuses.

At the moment there are more than 5 million students pursuing their education outside of their home countries – a number three times that of international student enrolments in 1990. By 2022, the number of internationally mobile students is expected to reach 7 million. The most significant growth in international education comes from Asian students, who are looking to study abroad in English.

International education is now open to the masses, and no longer only available the world's elite. This expansion is particularly driven by a rising middle class that now exists on every continent.

Student mobility, like many other economic and social principles, follows the laws of supply and demand: The popularity of study destinations

corresponds to the number of globally-appealing programmes that different countries offer, such as the United States, United Kingdom and Australia. These are, unsurprisingly, also the countries with the highest number of English-taught programmes around the world.

China's and India's rise to the world's top 10 most powerful economies (and South Korea currently holding the 15th place) has given rise to an increased demand for higher education. These three countries are also leading sources of globally mobile students. One in every six international students now comes from China, while Asian students make up more than a half of the world's mobile students.

International education is not a static phenomenon; it is influenced by international politics, changing demographics and economic factors.

What do we expect to see in the coming year, based on our expert insights and the mountain of data we have gathered on international study choice? Here are our top predictions for the year!



# 1. International Bachelor's Degrees

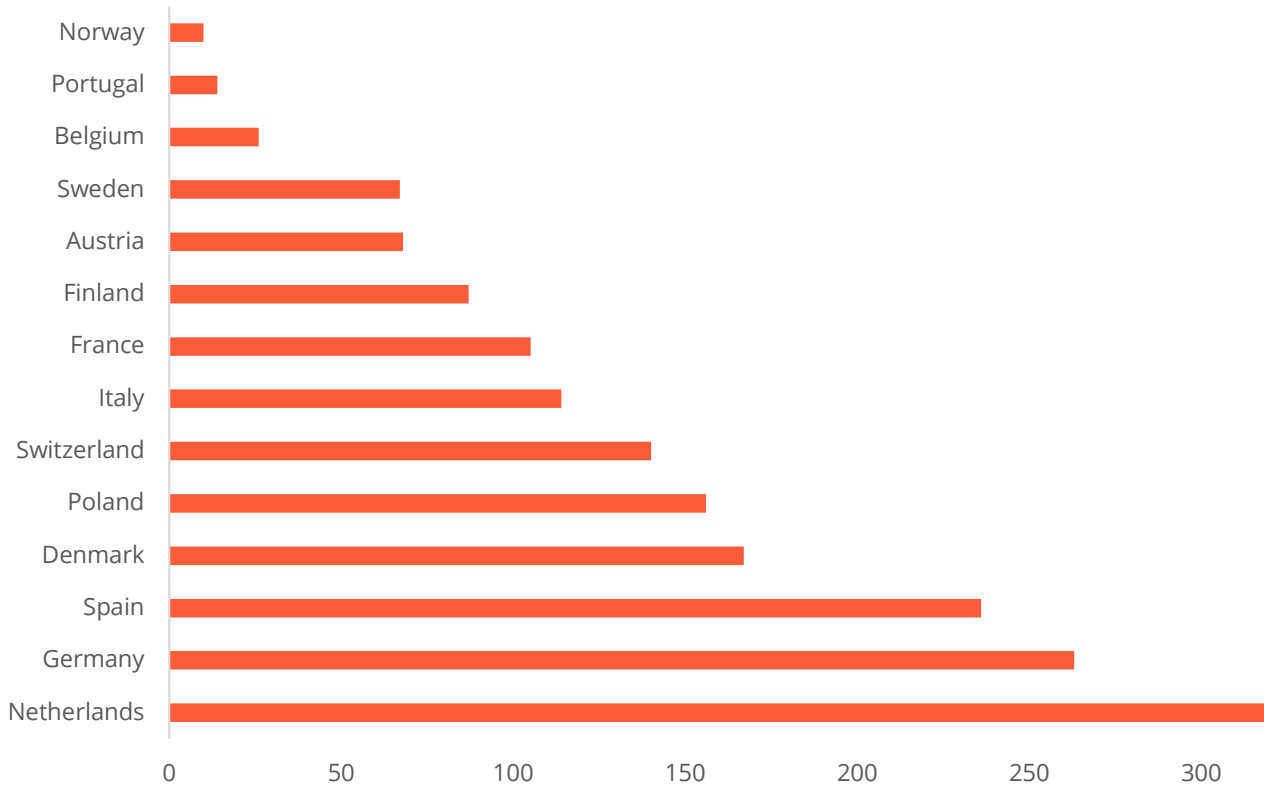
## **Rise of English-Taught Bachelors in Europe**

Starting from the Bologna process, Internationalization in Europe has, until recently, predominantly focused on Master degrees. However, with competition quickly accelerating for the most talented students, universities have expanded internationalization efforts to undergraduate programmes in order to attract bright and talented first-time students to their campuses. English is currently the main instruction language for over 3,369 Bachelor degrees in mainland Europe.

The countries driving this trend outside of the United Kingdom and Ireland are: the Netherlands (offering 319 undergraduate programmes in English), Germany (263), Spain (236), Denmark (167), Poland (156), and Switzerland (140).

## Top European Countries with Most English-Taught Undergraduate Programmes

Based on StudyPortals database (January 1, 2017)



The Netherlands also has one of the highest ratios of internationalization, with all of its 13 research institutes offering English-taught programmes aimed at attracting international students. German universities follow closely in the number of programmes they offer; although, their programmes are distributed across many universities. The demand for English-taught programmes has quickly increased in Germany especially since tuition fees were eliminated from universities; and now, students from anywhere in the world can study in Germany for (almost) free. At the opposite side of the spectrum, Nordic countries are slowly introducing tuition fees – a factor which might influence the demand from international students in the coming years.



## 2. Asia Rising

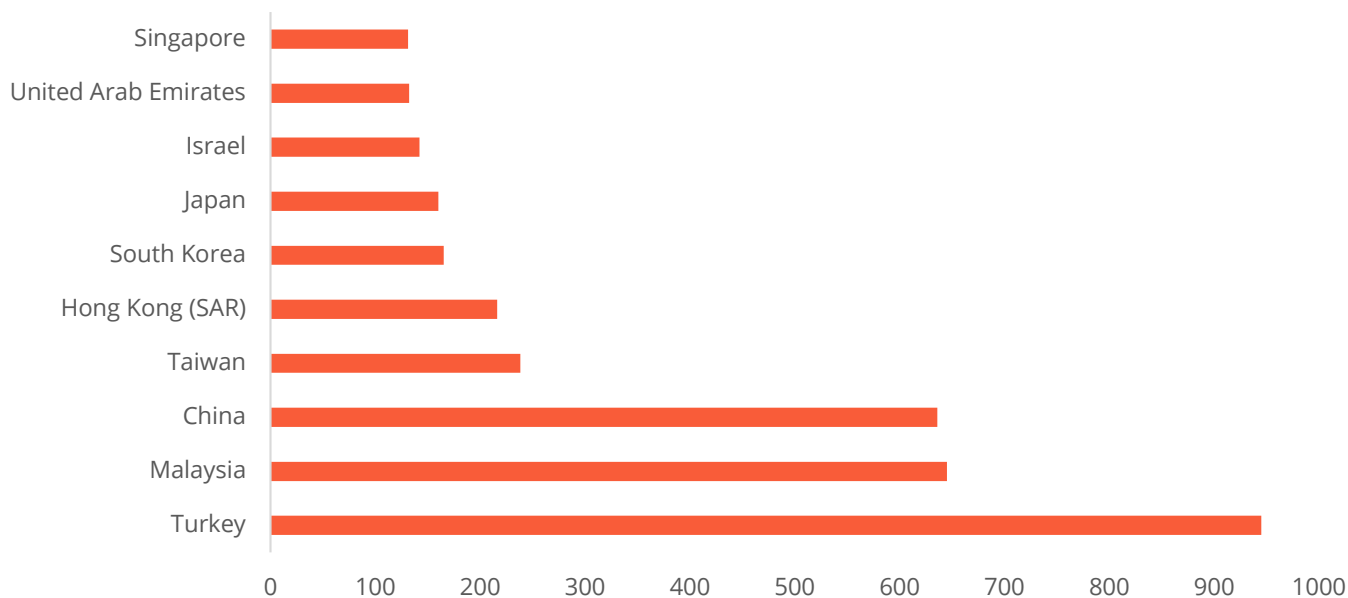
### **Asian universities also competing in teaching in English**

Europe introduced its first ETP initiatives just over a decade ago, and the numbers of programmes aimed at attracting international students has steadily increased ever since. Asian countries are in the midst of a similar initiative to attract more international students. Taiwan recently announced plans to attract 30,000 more international students by 2019. China already attracted almost 400,000 international students in 2015 - 5.46% more than the previous year.

Chinese universities are also breaking into top the global rankings for the first time, making them more appealing to prospective international students, while the Chinese higher education system also continues to expand at a remarkable pace. Malaysia is similarly looking to attract a greater share of the world's mobile students, aiming to host 250,000 foreign students by 2025. Currently is among the top 10 destinations for postsecondary education in the world according to UNESCO.

## Countries with Most English-Taught Programmes in Asia (graduate and undergraduate)

Based on StudyPortals database (January 1, 2017)



As Asian universities are increasingly keen to compete at an international level (and are going up international rankings), many are shifting towards attracting not only local talent, but also international students.

For instance, in terms of enrolment, India has the third largest higher education system in the world after China and the United States. However, there are few international students in India, since India's previous focus in student mobility was toward outward mobility. Despite India having over 728 universities and some 37,200 colleges, few of them are internationally-oriented, creating access barriers to non-Indian students.

China, on the other hand, has been steadily shifting its policies, not only to attract international students and introducing courses taught in English, but also by thinking about how to retain this global talent following graduation, giving students the skills necessary to stay in the country. For students following medical degrees, Chinese

universities also focus on teaching Mandarin to their international students, enabling them to enter Chinese hospitals for internships and after medical practice.

There are currently over 3,925 English-taught degree programmes in Asia, equally distributed among undergraduate and postgraduate levels.

While Asia is still behind in the number of study programmes it offers international students, it offers almost half of those that are available in Oceania, including higher education hotspots such as Australia or New Zealand. Asia might offer just 1/3 the number of programmes in continental Europe; yet just 9 years ago, the number of English-taught Masters in Europe was 8 times lower than it is today. Asia started its internationalization process later, but it still has an enormous expansion capacity. At the same time, some countries in Europe are reaching their maximum capacity for introducing international programmes, while still catering to national students.

Additional resources  
APAIE 2016 flyer: Asia Rising



### 3. Diversity Over Quantity

#### **The right mix of students more important than the sheer number of students**

International students contribute significantly to excellence in education and research, bringing a diversity of perspectives, experiences and languages that enhance the university experience for all students.

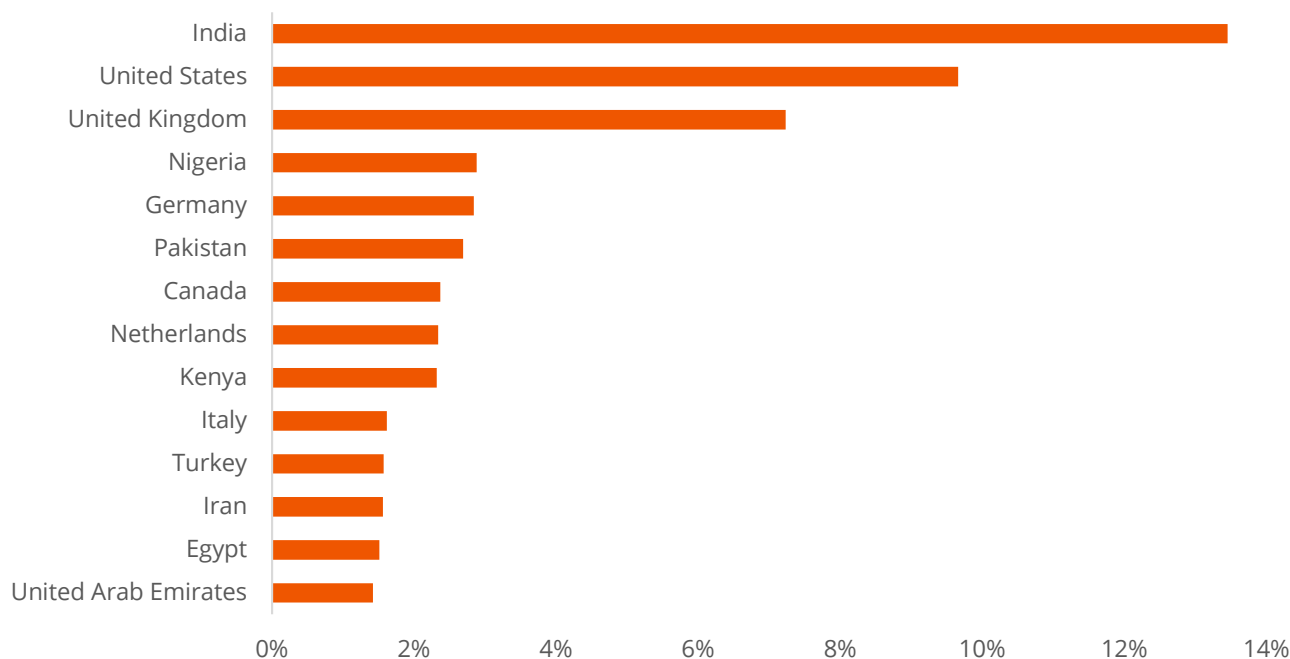
2017 will see student diversity meaning than just the number of international students on campus.

International student diversity helps expand students' worldliness on campus, enhances their social development, prepares students for better career success in a global society, and increases students' knowledge base about the world.



## Top Countries - Students Searching for International Degrees

Based on StudyPortals database (January 1, 2017)



Campuses in 2017 will be filled with a diverse range of students, and universities are quickly realizing that simply having international students on campus is no longer enough. Diversity is a key component to a high quality education programme.

The reason diversity is such a key component on campuses today is because it is a central means of bridging cultural and linguistic divides.

Diversity is precisely what should inform the interests of those of us who work in the realm of higher education. After all, as many universities have realized, universities can be instrumental in shaping the cultural development of society as a whole. By putting diversity into action and making education available to a global society, we can, therefore, make it not only something that universities say they value; it will become something that universities can ensure.

The interest in international education comes from a belief that social life is enriched through

contact with different cultures, traditions, languages, and histories. It's also increasingly true that universities and businesses have started to recognize the value and benefit they can gain from a more diverse pool of candidates.

Diversity is something that universities can achieve if they open their halls and classrooms to a wider population. The admission process is an important piece of the larger system; but students also ought to have access to and information about their study options. They ought to feel empowered to find the best educational options on a global scale. This is what StudyPortals commits to; helping students write their own educational story, without borders, and allowing universities to reach the best of the world's talent.

Based on the traffic on our portals, Indian students are the ones who are most actively looking to study abroad, followed by American and British students, as well as students from developing countries such as Nigeria, Pakistan, and Kenya.

Additional resources  
Article: A tribute to a pioneer of campus diversity



## 4. Responsive First

### Digital strategy starts with a great website

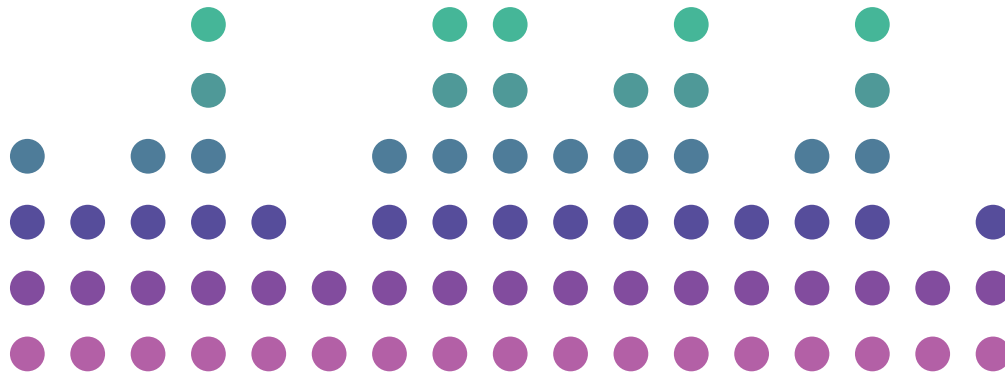
The wide-spread use of smart phones has changed the way prospective students use the Internet and search for their next study destination. Throughout 2016, over 36% of all sessions on our platforms occurred on a mobile device, and another 5% on tablets.

Having a responsive design website is especially important for students in India and China; but it is also valuable to students in the United States and United Kingdom who frequently make study searches on their smart phones. Responsive design ensures that, wherever students are in the world, your website is guaranteed to perform at its best, regardless of the device it's being displayed on.

Creating responsive websites is not only relevant when students are on your website, but also in the search process, as Google boosts the ranking of mobile-friendly websites when students are using their smart phones.

In India, with a population of 1.2 billion, there are over 950 million mobile phones and over 250 million internet users. As students are more connected worldwide, they will more easily search for programmes abroad, and will be reached easier with university recruitment efforts.

Additional resources  
Blog: Improving the mobile experience



# 5. (Big) Data Driven Decisions

## Decisions based on data will overpower those made just on gut feeling

Gone are the days when big decisions about international education, students, and study programmes were made in a university boardroom far removed from reality. Now all of these decisions can be supported by (big) data. In 2017, universities will make better use of the data available at their fingertips, but will also leverage external sources to enhance their own data, empowering them to make better decisions about which courses to introduce, how to attract new students, and ways that they can promote their brand. Data can now be easily accessed through interactive business intelligence dashboards that can easily inform on trends, patterns, and help you uncover potential opportunities.

Big data is a great way for universities to make smart investments based on insights, rather than on gut feelings.

Investing in programmes that prospective students desire and that are in a strong, competitive position ensures growth and long-term return. Online search behaviours are a strong indicators of market demand and can provide institutions with critical insights so that better decisions are made about programmes and initiatives.

Additional resources  
On-demand webinar: Using the economic fundamentals of supply and demand to grow academic programmes



## 6. 24/7 Recruitment

Choosing where to study abroad is probably the most important decision that students make in their lifetime. While our jobs and lives follow a rather predictive pattern around the academic year, students, and, particularly, international students behave rather differently when choosing a university.

Most international students spend an average of 1.5 years deciding where to study next: from first coming up with the idea, to actually enrolling at their dream university. The truth is that most of these students know largely WHAT they would like to study (although maybe not the exact field), and then narrow down their options by researching study destinations, languages based on their skills, and – later – tuition fees.

This sadly means that universities cannot promote their programmes only when the application deadlines are approaching, but rather need

to maintain constant efforts throughout the year. It also means that promoting the university, as well as the region and country, should be integral to any marketing programme.

Furthermore, students usually apply to at least five universities. So, maintaining an active engagement with them, even after the application deadlines have past is key to ensuring that, if they are accepted they will enroll in your university versus another.

Students also tend to forget about calling hours or time differences when requesting information. In the end, university and programme promotion is a non-stop activity, rather than a seasonal process. Technology can, of course, help in this process, helping you maintain year-long campaigns, automate processes and follow-ups, and optimize your engagement with prospective students at the right time.



## 7. Brexit Impact

The UK's decision last year to leave the European Union will have a strong impact on higher education in the coming years. Of course, the British higher education system has proven resilient in the past, but much of it still hangs in the balance. One thing is certain: international students and their parents would rather have some indication as to what the future holds, and would like some quick answers related to tuition fees, funding, and visas.

We expect that European students will slightly shift their interests from studying in the UK, and expanding their pool of options to include competing countries such as the United States (16.57%), Germany (16.06%), Netherlands (14.88%), or Sweden (8.55%). Short-term, this effect will be rather limited, especially for post-graduate degrees.

Non-EU students are not as affected by Brexit, and have stayed relatively stable in their interest

to study in the UK, with interest from Chinese students off-setting the waning interest of Indian students (HESA, 2017). Malaysian students have also overtaken India for the first time, becoming the second largest cohort of international students in the UK. These students' largest concerns are the possible changes to the visa regulations and immigration caps.

Based on StudyPortals visitor statistics, students from non-EU countries are continuing to show a steady interest in studying in the UK. The countries standing out in this regard are: China, the United States, Ukraine, Vietnam, Russia, Malaysia, and Iran, whose interest in studying in the United Kingdom has remained high even following the referendum results.

For the time being, the future of Brexit is still difficult to predict. What we can do, however, is look at the potential for growth within British universities.

Additional resources

On-demand consulting services: Our Analytics and Consulting team can help you develop dashboards to monitor the impact of Brexit on your international student recruitment

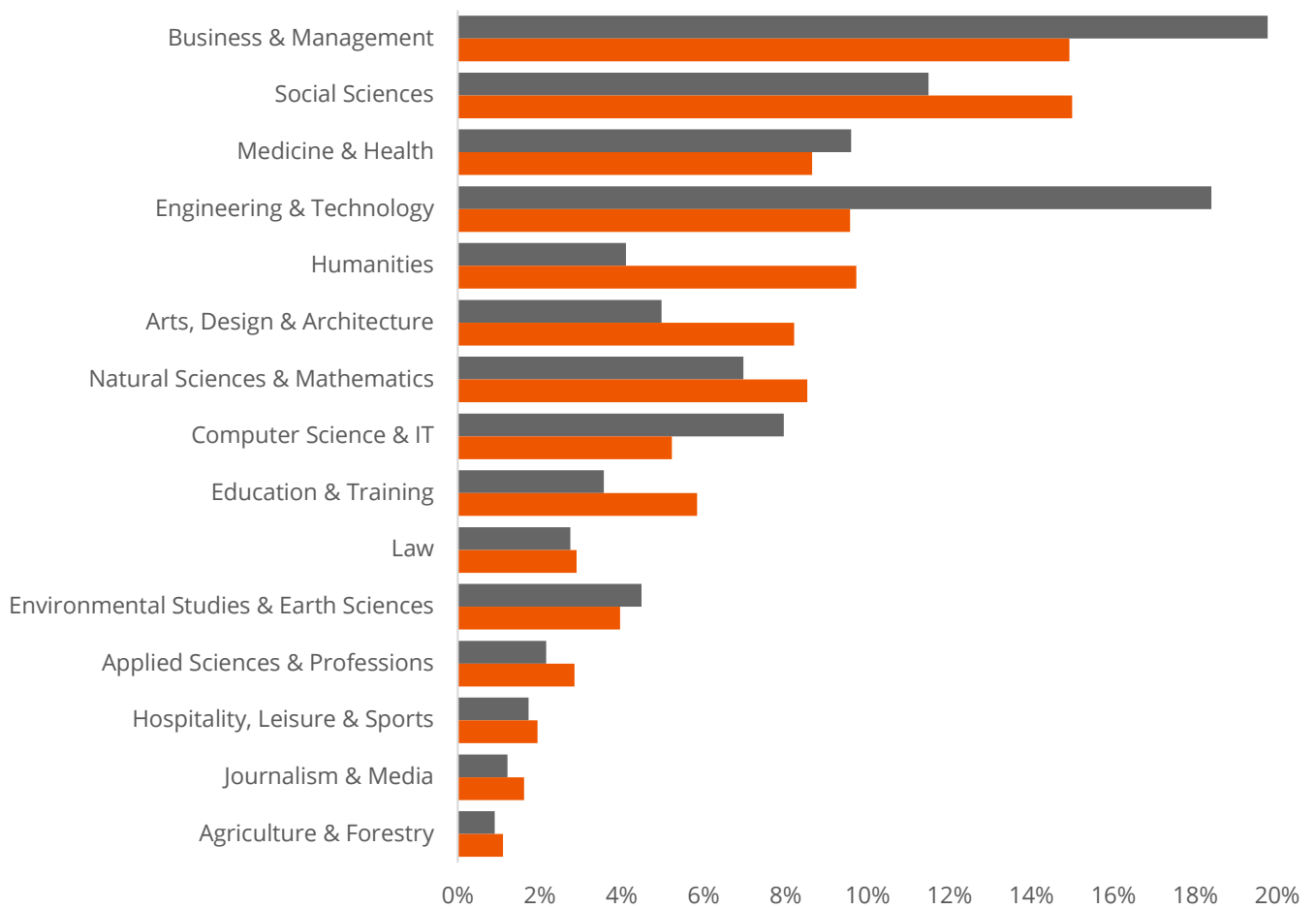


## 8. Discipline Popularity

International students exhibit different search interests from domestic students, usually focusing on studies with higher return on investment and fields where an international focus is highly valued.

Based on the search behaviour of 19 million visitors on the StudyPortals platforms, universities who are introducing study programmes aimed at international students can better focus on programmes within Business & Management, and Engineering & Technology - disciplines which show the highest divide between student interest and the current study programmes offered. Studies in Medicine & Health also show a high promise, together with Computer Science & IT and Environmental Studies & Earth Sciences.

The interest in this discipline is not isolated though, and is usually driven by interest in a few hot topic sub-disciplines and differ per study level, as well as the country of origin or destination. Some sub-disciplines that stand out include not only Computer Sciences, Data Science & Big Data, but also MBAs, International Business, Energy & Power Engineering and Management, Organisation & Leadership



## Popular sub disciplines

Agriculture, Design & Architecture:

- Architecture
- Design

Business & Management:

- Business Administration
- International Business
- Management, Organization & Leadership
- MBA

Computer Science & IT:

- Computer Sciences
- Data Science & Big Data
- Informatics & Information Sciences

Engineering & Technology:

- Energy & Power Engineering
- Mechanical Engineering
- Electrical Engineering
- Automotive Engineering

Additional resources  
Discipline Spotlight: Social Sciences



## 9. ROI in Student Recruitment

Every year, universities and schools dedicate a large percentage of their budgets to reach, inform, enrol and retain students. Each initiative comes with its own costs; not just monetary costs, but also those related to the amount of time, energy, and resources spent.

“You can’t manage what you can’t measure.” When promoting your institution and programmes, it is important to know how much value has come out of your investment. You want to make sure that you are showcasing your institution, but also that you are indeed generating results for your campaigns in terms of applicants and enrolled students.

For many universities, 2017 will be the year they focus on the ROI of marketing activities, evaluating the impact and effectiveness of their campaigns across all marketing channels (both online and offline).

Since CRM and web analytics are powerful tools for tracking the performance of marketing campaigns and promotion, we see more universities investing more heavily into tracking their results and using data to justify their marketing investments.

Additional resources

On-demand consulting services: Our Analytics and Consulting team designs trainings aimed at understanding the ROI of your student recruitment campaigns.





# 10. Alternative Access Routes

Bringing in students from different cultural backgrounds to university classrooms enhances the intercultural learning experience. However, not all students who want to study abroad always have all the necessary skills and knowledge to succeed in their programmes.

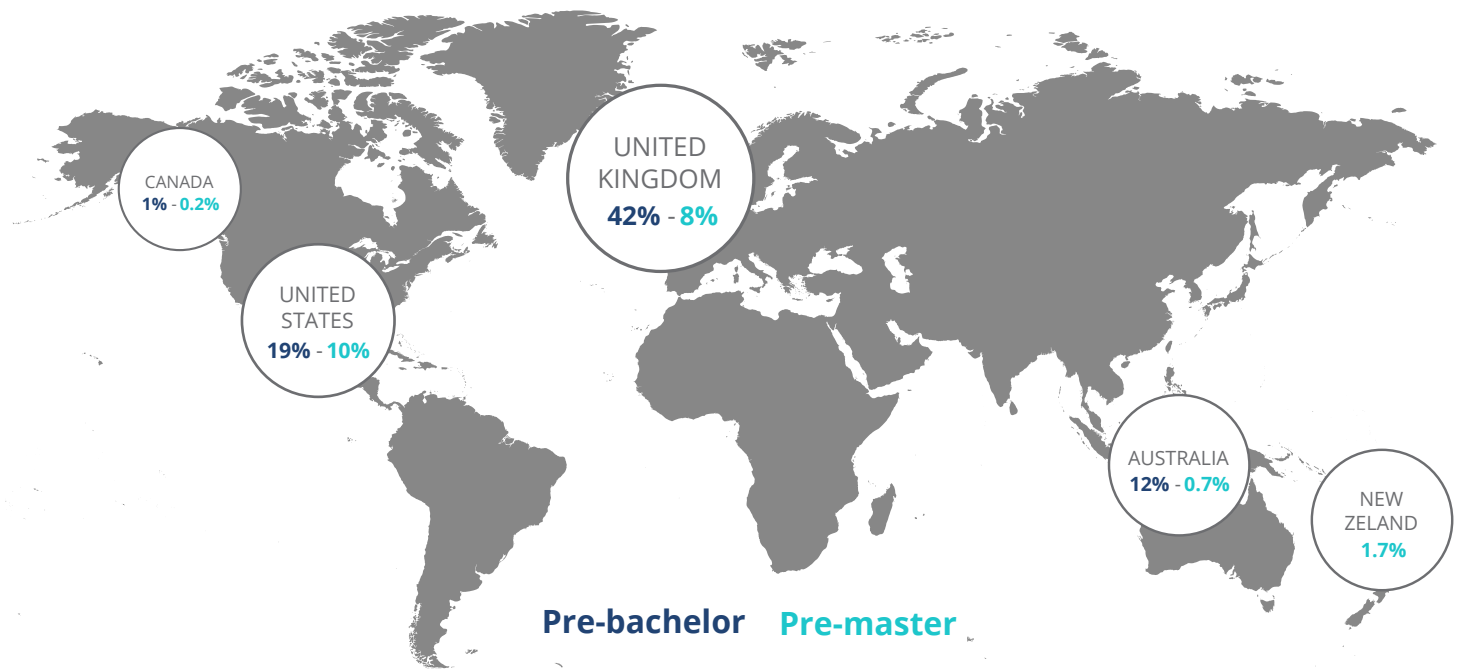
In 2017, we see more universities partnering up with pathway programme providers to offer more of these opportunities.

Pathway programmes prepare international students for university by helping them bridge gaps in their language proficiency, academic knowledge, and study skills. These programmes support universities committed to widening participation, enabling students from all backgrounds to access international higher education and perform well in the classroom.

A number of factors influence the number of programmes offered. These factors include:

- Government policies regarding the provision of English-taught programmes
- Whether institutions are allowed and willing to charge tuition to international students
- Visa regulations
- Capacity to teach programmes in English
- Perceived market demand.

At the moment, our research estimates that the demand for pathway programmes is on the rise, as more students are looking to study abroad – especially students from countries such as China, India, Nigeria, Malaysia, Nepal, Pakistan, Saudi Arabia and Turkey.



The trend in many universities is towards policies that encourage a diverse student body within their pathway programmes – a feature which cannot simply be obtained with the use of agents who have specific recruitment markets, and usually focus on big Asian suppliers such as China or India.

In 2017, universities will be expanding their pathway programmes to accommodate more international students, placing focus on the quality of the education they provide. We also see a strong need for certification in pathway programmes that allow prospective students to access more universities and degrees after the completion of their studies.

We expect that most pathway programmes will continue to grow in traditional markets such as the United Kingdom, United States and Australia. However, visa regulations make this sector particularly volatile in these key markets, creating an opportunity for European countries, Canada, or Singapore to attract an increasing share of pathway students.

Overall, the demand for pathway programmes will grow in line with increasing demand for international education. This is surely a sector showing no sign of slowing down in the coming year.

Additional resources  
Routes to higher education: the global shape of pathway programmes



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