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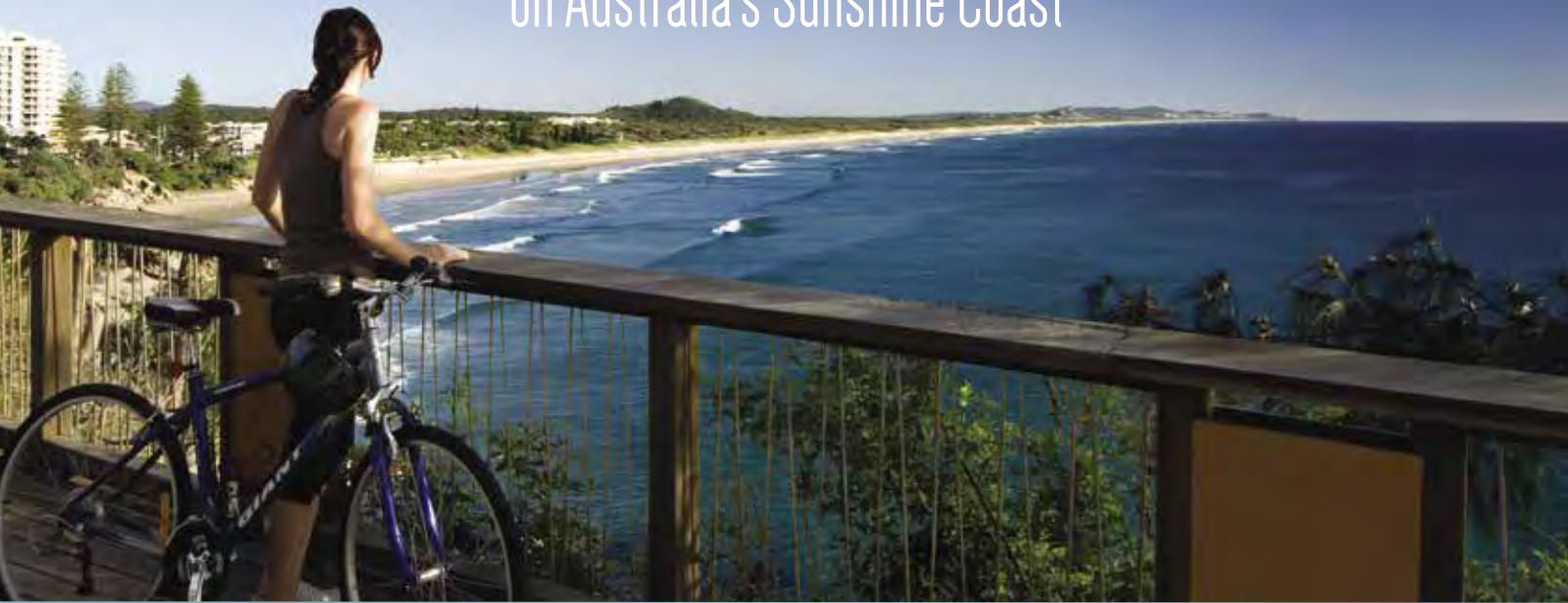
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*2016-17 KPI Student Satisfaction and Engagement Survey, KPI Employer Satisfaction Survey

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takes you.**



WELCOME

Welcome to this year's ICEF INSIGHTS, which I am pleased to say is brimming with ideas for how to strengthen your recruiting at a time when the dynamics of international student mobility are rapidly changing.

Growth in overall mobility is slowing, thanks in large part to demographic shifts and increasing higher education quality and capacity in China. Students are considering an expanded range of destinations for their studies, with countries like Canada and Australia picking up share from the US and UK and regional hubs in Asia stepping up their recruiting. Destinations and institutions that once easily attracted students can no longer rest on their past success, and recruiters need new ideas for thriving in our quickly evolving industry.

That is why this year's issue focuses on how to approach and integrate a portfolio of recruitment strategies such that each tactic builds on the others. We consider the roles of social media, institutional websites, alumni networks, and student ranking and review sites. We look at the way students use Instagram and how educators can leverage student-generated content (e.g., posts, conversations, photos, and videos).

And there's more. We look at Generation Z and how it differs from the millennial generation. An article on student mental health illustrates how crucial it is to support students who are struggling in this area. Agents chime in with the top questions parents have when evaluating which destination and institution is best for their children. Our global map feature shows how currency fluctuations affect student mobility flows across the planet. And we spotlight five new markets that look promising for educators working to diversify their enrolments.

As you will see, I am not exaggerating when I say this issue is full of resources, information, and best practices geared precisely to what is happening in international education today! Wishing you an interesting and inspiring read.

With best wishes,

Markus Badde
Chief Executive Officer





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NEW & NOW

Generation Z, parents' top questions, mobility trends, and student-generated content



HELEN SOTIRADIS

Above: The Forbidden City in Beijing. See “In Context” on page 22 for more on how the slowing Chinese outbound market is affecting global mobility trends.



CLUB ZED

Born between the mid-1990s and the early 2000s, some Generation Z students are still in grade school. But they're also filling the classrooms of high schools, colleges, and language institutes, and they're distinguishing themselves from the millennials who came before them.



SKEPTICAL & DISCERNING

Gen Zs are growing up in the post-truth era when countless politicians and companies have manipulated facts or abandoned them altogether. They're wary of advertising and look to online recommendations from friends and peers when deciding what to buy.

TAKEAWAY: Leveraging user-generated content is a must (see the UGC article on page 19 for tips).

AUTHENTIC

Most Gen Zs can spot a Photoshopped image miles away. They know filters and see right through them, just as they see through the claims made by companies that aren't truthful.

TAKEAWAY: Being authentic and transparent is paramount. The more real and honest you are, the better the connection you will have with your target market.

PROTESTORS & ADVOCATES

Gen Zs will fight for their rights and the rights of others, too. They are passionate about equality and justice. And having grown up talking openly about the "taboo" subjects of anxiety, depression, sexuality, and self-esteem, they prioritise mental wellness.

TAKEAWAY: Incorporate Gen Z values into your organisation through such initiatives as charity work, environmental leadership, and support services for all students. Connect and engage with students around these values on social media.



ANXIOUS

War, global terrorism, cyber-attacks, climate change – Gen Zs are growing up amid significant threats and challenges. More than half of Gen Z respondents taking part in a study by AFS Intercultural Programs cited concerns about safety and security when considering study abroad.

TAKEAWAY: Students and parents are making study abroad choices based on a country's reputation for safety. At the organisational level, taking measures to increase security on campus is a real competitive advantage, as is a commitment to providing a welcoming and friendly environment.

NO LOGO

Gen Zs refuse to be anyone's walking billboard – unless it's for a cause they care about or a product, service, or company they can't get enough of. And then they'll shout from the rooftops – they love being influencers.

TAKEAWAY: Make them happy and they'll probably spread the good news. For Gen Zs, everything is social, and sharing great experiences is a huge part of that.

LIMITED ATTENTION SPAN

No generation has had so many demands on their attention. It takes Gen Zs about eight seconds to decide if something (or someone) interests them.

TAKEAWAY: Be bold, be brief, and be visual. Think images and short, topical videos.

TECHIE+

Gen Zs have never not had the Internet and they live on their phones. As a Google research study notes, "While millennials were mobile pioneers, teens are mobile natives."

TAKEAWAY: Your website and email campaigns have to look great on students' phones. Period.

HARD WORKING

Many Gen Zs grew up during the recession watching millennials struggle to find jobs. They don't take employment for granted and know it takes hard work and savings to get ahead. They'll consider a degree from a less expensive college or university in order to enter the workforce with minimal debt – so long as it helps them get a good job.

TAKEAWAY: Showcase successful alumni, offer internships, and facilitate networking and links to industry. Smaller schools offering great value for an affordable price have an exciting opportunity to appeal to Gen Zs.

PRIVATE

Gen Zs truly understand that the Internet is forever and that anyone can hit "record." They are more careful in protecting their online profiles and activities, preferring platforms that instantly delete their content after viewing.

TAKEAWAY: Communicate with students using the same apps they use, always keeping privacy and data security top of mind.

MOBILE/TRAVEL

In a 2016 study conducted in 27 countries, six in ten 13–18-year-olds had considered study abroad, and between 57% and 75% said their main motivation was to seek out new cultural experiences.

TAKEAWAY: Gen Zs are more concerned with experiencing a new culture and interacting with local people than millennials are (the latter are most interested in study abroad directly helping their careers). Feature recreational opportunities in marketing campaigns.

FOODIES

Amazing fact: #foodporn on Instagram has over 150 million tags, and Gen Z is strongly represented among Instagram users.

These foodies care about what they put in their bodies and are looking for more food experiences and less drinking.

TAKEAWAY: Schools should definitely be highlighting food culture and restaurants to appeal to the taste buds, as well as the study plans, of Gen Zs. Food images evoke the pleasure of studying in a new region or country.





CASH FLOW

Currency exchange rates change every day, often by small amounts but sometimes drastically. Over time, those fluctuating values affect the affordability of a given study destination as well as student decisions about where to study. To better illustrate some of these effects, here is a quick review of how the currencies of selected sending markets fluctuated between September 2017 and September 2018.

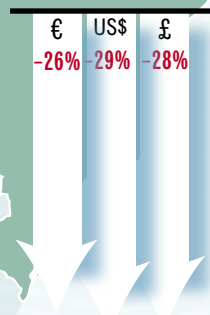
The **Brazilian outbound student market** began to climb again in 2016 after a crash in 2015, and currency fluctuations changed where students chose to study. In 2017, the UK was the third most popular destination for Brazilian students, climbing from fifth place in 2015. The relatively favourable exchange rate for the real against the pound contributed greatly to the UK's appeal, pushing Australia and Ireland further down the list of preferred destinations for Brazilian students.

A drop in oil prices in 2015 stalled **Nigeria's economy** as well as its flow of outbound students. But the economy rebounded in 2017 and at that point strict foreign exchange controls that had been put in place during the downturn began to ease. Consequently, Nigerian students have once again begun to travel abroad in greater numbers. The UK hosted almost a quarter of the 95,000-plus Nigerian students who studied abroad. And with its large and youthful population growing and limited higher education capacity at home, Nigeria is projected to be one of the world's fastest-growing markets for study abroad over the next decade.

Russia's economy emerged from a two-year recession in 2017 and the rouble has risen in world exchange markets. Russia's outbound numbers have increased again in tandem following a lull coinciding with the economic downturn. The rouble's growing strength against the US dollar contributed to Russian education agents saying they will refer more students to foreign institutions in 2017 than they did in 2016.



BRAZILIAN REAL





RUSSIAN ROUBLE

€	US\$	£
-12%	-15%	0%

JAPANESE YEN

€	US\$	£
0%	0%	-2%

TURKISH LIRA

€	US\$	£
-77%	-82%	-80%

INDIAN RUPEE

€	US\$	£
-7%	-10%	-10%

VIETNAMESE DONG

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The Language Gallery JUST ORS



5 WAYS TO HELP STUDENTS SHARE YOUR STORY

Students judge brands by the conversation around them and are highly influenced by what their peers have to say. That's why it's crucial to leverage user-generated content.



It's a given now that students will be talking about, and posting images and videos of, their experience at their school or university. When that content – known as user-generated content, or UGC – is positive, it can be a powerful recruitment tool ... but only if you know how to leverage it.

That requires a dynamic and responsive approach to social media marketing. A digital marketer's job is to leverage the great content others are providing by encouraging it, making it easy to find, and responding to it enthusiastically.

A recent Ipsos/Crowdtap survey found that among millennials, UGC is 35% more memorable than traditional media and 50% more trustworthy. In addition, 45% of respondents to that survey said they use UGC to guide their hotel choices and 40% said it influences their travel plans – and in many ways, deciding where to study abroad is a travel decision.



1

USE EMOJIS

They're not just cute and silly – they're part of students' language, not the least because they're visual. Research shows that tweets with emojis receive 25% more engagement than those without them, and that emojis can increase Facebook likes by 57% and comments by 31%. Emojis are a great way to have fun and inject personality and humour into conversations, and they're a more personal response than just "liking" a student's post. Just remember to make sure to use the right emoji!

The world's three most popular emojis

Choose which emojis you think are first, second, and third in terms of how often they are used around the world.



A



B



C

Answer: B = 1; C = 2; A = 3 ... except in France, where C came out on top (of course!).

2

GET A GOOD HASHTAG

Hashtags are the foundation of searchable UGC. As Steve Cooper wrote in *Forbes*, "To [young people], using hashtags is as natural and common as typing their query into the search box."

When brainstorming hashtags, invite a small group of students to participate. And keep in mind that if a hashtag is too formal or uncool, students won't use it. Nor will they use it if they think you're forcing it.

Encourage students to use your tags. Promote them everywhere you can, such as physical spaces on campus (e.g., residences, dining halls, sports events) as well as on social media and in email newsletters and brochures.

Hashtagging 101

MAKE THE HASHTAG MEMORABLE The #IceBucketChallenge hashtag was a huge success because it was easy to recall and spell, quickly conjured up a fun image, and represented a great cause.

INCLUDE IT EVERYWHERE YOU CAN To catch on, hashtags need to be an essential component of your social media strategy.

DON'T MAKE IT TOO LONG Simple is best.

CHOOSE ONE THAT'S IMPOSSIBLE TO MISREAD There are countless examples of ill-considered hashtags (e.g., British singer Susan Boyle's PR team chose "#susanalbumparty" to announce her new album).

DON'T USE MORE THAN TWO OR THREE HASHTAGS PER POST And include them after the message itself. Too many hashtags look like spam and the main content of the post tends to get lost in all the #s.



3

BE RESPONSIVE

Students are taking time to contribute UGC about your school, so respect them by responding quickly and thoughtfully to their posts and queries. This Facebook exchange between a prospective student and University of Melbourne marketing staff is a great example of responding in a timely and helpful way to social media queries.



4

THANK STUDENTS FOR THEIR POSTS

Kaplan International English shows how it's done on their Instagram page. When possible, extend from just "thank you" to a more personal exchange. In the example below, that could be something like, "What a great shot @senecka_16! That roo looks pretty friendly!" Engaging in conversation takes a little more effort and shows that you are genuinely interested in students' posts.



5

GATHER YOUR INFLUENCERS

For the best chance of success, ask a few students who are enthusiastic about their experience at your school and active on social media to begin tagging their posts with your hashtags. Ideally these students will have substantial followings and be passionate about taking photos or videos.



IN CONTEXT: SLOWER GROWTH AHEAD

As China's higher education capacity increases and its college-aged population declines, strategies to attract students in promising new outbound markets are no longer optional



Between 2000 and 2015, student mobility grew by nearly 6%, on average, per year; there are now more than 5 million students studying abroad. These students contribute billions of dollars to the global economy and are catalysts for distributing knowledge and skills across borders. But a British Council study projects that growth in student mobility will drop to an average of 1.7% per year for the next 10 years. Other research supports the prediction that international student numbers will increase again after that, but not as much as in the past 20 years.

WHY THE SLOWDOWN?

China and India account for roughly half of the world's college-aged population and contribute about 40% of the global growth in outbound student numbers, so demographic shifts in these countries strongly influence demand for study abroad. And in China, the population of 18–23-year-olds is declining. The United Nations Population Division predicts that between 2015 and 2020, the number of Chinese in this coveted age range will decrease by more than a fifth. By 2050, it is expected to fall by another 20%.



With this slimmed-down total population of Chinese students comes a smaller proportion of Chinese students who will study abroad, especially at a time when China is rapidly expanding both its domestic higher education capacity and its market share of international students. A recent report from the Observatory on Borderless Higher Education titled *Establishing a Presence in China* notes that “At current rates of higher education growth and demographic transition, there will be a university seat for every child in China by 2030.”

China is now the world’s fourth most popular study abroad destination and is particularly attractive to students from within Asia.

MORE COMPETITION ON SEVERAL FRONTS

China isn’t the only compelling study destination in Asia today. The traditional pattern of East-to-West student flow is quickly changing, with countries including Japan, Malaysia, the Philippines (for English-language instruction), South Korea, and Taiwan positioning themselves as destinations as much as sending markets.

The expansion of transnational education provision and the rapid adoption of online teaching and learning are putting additional downward pressure on student mobility and represent even more forms of competition in the international education marketplace.

WHAT WILL IT MEAN?

International student numbers will continue to grow, albeit more slowly. Competition will intensify among institutions courting the best and brightest students as well as among destinations looking for a greater share of the global market. Massive open online courses (MOOCs) and other online delivery models will also claim students who might otherwise have gone abroad to study.

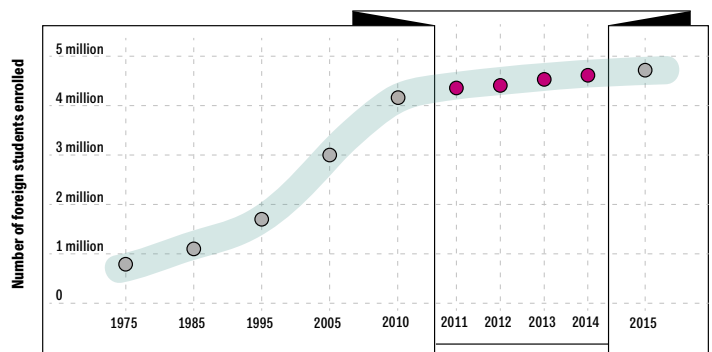
One near-term impact of the slowdown could be greater price competition and discounting in relatively commoditised programming

(e.g., general-purpose English-language studies) and more differentiation in other programme areas. It will take more to stand out from a crowded range of options for students, and institutions will need to expand their recruitment and marketing activities. Some schools, universities, and programmes may close amid the pressure.

The bottom line is that it will be more challenging to attract international students, especially those from China – the market Western institutions have most relied upon in the past for international enrolments. More than ever, market diversification is crucial. Now is the time to diversify, and there are many promising markets to choose from: Bangladesh, Brazil, Colombia, Indonesia, Iran, Sri Lanka, and Vietnam, to name just a few.

Knowing the unique regional characteristics of new target markets and investing carefully in both online and in-person outreach among students and local agents in those markets is no longer optional but required in a marketplace where such activity is the norm.

Growth in foreign enrolment in tertiary education worldwide, 1975–2015





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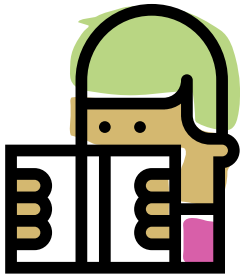
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FACTS & FIGURES

Stats that illuminate just how quickly the international education marketplace is evolving



29%

Increase in the number of schools worldwide delivering education in English and according to an international curriculum from 2013 to 2017 (Source: The ISC Research *2018 Global Report*).

1.6 MILLION

Roughly 1.6 million millionaires and nearly 650 billionaires (in US dollars) live in China today (Source: The ISC Research *2018 Global Report*).

53%

Percentage of Instagram users who follow brands – a higher proportion than users on Facebook or Twitter (Source: GlobalWebIndex).

1.7%

Projected growth in international student mobility through 2027, compared with 5% from 2012 to 2015 (Source: The British Council).

41%

Increase in international students in Canada from 2015 to 2017 (Source: Immigration, Refugees and Citizenship Canada).

TOP 10

The top projected growth markets for outbound student mobility from 2015 to 2027: China, India, Pakistan, Nigeria, Bangladesh, Saudi Arabia, France, Nepal, Indonesia, and Kenya (Source: The British Council).

20%

User-generated content (e.g., students' own social media posts) is 20% more influential than any other type of media on purchase decisions. (Source: Business2Community).

ONE-THIRD

The average Internet user now spends 6 hours each day using Internet-powered devices and services – roughly one-third of their waking lives (Source: GlobalWebIndex).

ONE IN FOUR

Fully 25% of scientific research papers worldwide are now written by authors in more than one country, compared with 16% in 2001 (Source: UNESCO Science Report: *Towards 2030*).

9 IN 10

Proportion of the world's 3 billion social media users who go to their platform of choice via mobile phone (Source: We Are Social).

#1

Germany came out tops (from a field of 30) in a ranking geared to helping international students choose the best European study destination for a full degree (Source: Study.EU *Country Ranking 2018*).

5.5%

Decline in international graduate student enrolments in the US from 2016 to 2017 (Source: National Science Foundation's *Science and Engineering Indicators 2018*).

78 MILLION

Number of students enrolled in MOOCs in 2017, up 35% from 2016 (Source: Class Central).

600,000+

Number of international students in Australia in 2017, up 13% from 2016 (Source: Australian Department of Education and Training).

135%

Video posts on Facebook have 135% greater organic reach than photo posts (Source: Social Media Today).

90 SECONDS

Videos shorter than 90 seconds boast a retention rate of 53% versus only 10% for videos over 30 minutes (Source: Hubspot).

90% AND 86%

Mobile's share of total time spent online in the important student markets of Indonesia and India, respectively (Source: Statista).

60%

Six in ten American Instagram users open the app at least once a day and 38% check Instagram multiple times a day (Source: Pew Research Center).

MORE THAN HALF

53% of all internationally mobile students live in Asia, which is increasingly significant given the growing trend of Asian students staying within the region to study (Source: *ICEF Monitor*).

FIRST

Consumers are most likely (49%) to engage with branded video on Facebook, followed by YouTube (32%), Instagram (24%), and Snapchat and Twitter (both 22%) (Source: Tubular Insights).

Where thought
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PERSPECTIVES

What is the most common question you hear from students' parents?



"Students and parents consider two main factors when choosing an institution: the ranking of a school and the possibility of employment in the chosen country of study."

Elena Safronova, Head of Higher and Secondary Education Abroad Office, DEC education, Ukraine

"The higher education system in India is one of the best in the world, so if my child gets an offer from a good university in India, what is the advantage of sending him or her abroad?"

Sonya Singh, Managing Director/Founder, SIEC Education Pvt. Ltd., Australia



"Will our children get permanent resident status if they graduate from this college or university? And are students eligible for an entrance scholarship?"

Sonal Shah, Director, Kanan International Pvt. Ltd., India

"The number one question from parents is about our faculty's length of tenure. International schools tend to have a high turnover rate for teachers, and parents want to know if their child will have a stable environment."



William Kralovec, Head of School, Osaka International School of Kwansai Gakuin, Japan



"In my work with international boarding students and their parents, a common question that comes up from parents is about their child's safety on campus."

Kristen Mariotti, former Director of Admissions & Enrollment Management, Flintridge Sacred Heart Academy, USA



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PERSPECTIVES

What is the most common question you hear from students' parents?

“If I send my son or daughter to this country, how do I know that they will succeed and that they will get what they are looking for there?”



*Fanambinana Gabriel Jacky, Managing Director,
Fan Education Agency, Madagascar*

“How much is tuition and what is the cost and availability of accommodations?”



*Brigitte Chatué Tchata,
President, Performance
Immigration Canada Ltd.,
Cameroon*

“Whether it concerns a summer programme, a language course, or an academic semester abroad, parents generally ask the same fundamental question: ‘What results can I expect?’ This is then followed by concerns about safety, student supports outside the classroom, the application process, and without exception, cost.”

*Fahra Bellak, Regional Director for the
Americas, Oxford International Education
Group, Mexico*



**“Do you offer scholarships?’
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of parents select
a university that
offers scholarships, especially if the
scholarship covers full tuition fees
and living expenses.”**

*Manpreet Kaur, Business Development
Manager, CQUEnglish at CQUUniversity,
Australia*

“When it comes to parents looking at programmes overseas, safety tends to be their number one concern and we’ve found that our Canadian locations provide the safe destination, and peace of mind, that parents are looking for.”

*Maria Izvyekova, Regional Sales Director,
ILSC Education Group, Canada*





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STAFF INSIGHTS:

How do you choose the countries or regions where you will launch new ICEF events?

ICEF currently offers workshops in 17 countries. From international events for the industry as a whole to destination-focused workshops and smaller events with a regional or single-market focus, there is a wide range of options for agencies and educators.

In 2017, 8,221 participants from over 100 countries attended ICEF events, resulting in tens of thousands of one-on-one partner meetings around the world.



“Over the past three years we have added several new regional workshops and Agent Focus events in Africa, Southeast Asia, Central Asia, and Ukraine. We wanted to focus on emerging and growing markets and also countries where fundamental changes have been taking place. There is always a dual aspect to new ICEF events, as we not only want to introduce and open up new markets for providers, but also offer agencies that might not be able to travel far from home the opportunity to attend a regional or local event to build their partner portfolios.

We always welcome and listen very carefully to feedback from our clients regarding regions in which they see emerging trends, and we work closely with education associations around the world to explore new event sites. Their support and input has been crucial in establishing a number of new, successful events over the past few years.” –Isabel Vogt



Above: Isabel Vogt, Vice President, Events & Logistics on site at the newly established ICEF Southeast Asia Workshop in Ho Chi Minh City, Vietnam.

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▶ Recruitment never sleeps

How to use multiple channels
to keep your marketing going
around the clock



JOVIO JOVANOVIĆ



One thing we never hear," a colleague said recently, "is that recruitment is getting easier." As noted elsewhere in this issue (see "In Context," page 22), growth in outbound student mobility has slowed over the past several years, and this is happening at the same time as many new players – schools and destinations alike – are vying for international students. The result? Intensified competition and a prospect pool presented with a much greater range of options. The pressure is on for all recruiters to keep their institutions front of mind for prospective students throughout their decision process.

If that sounds like the start of an argument for working even harder or trying to stretch your limited marketing resources even further, it isn't. But it is a call for more sophisticated and more efficient recruitment marketing, especially because many institutions and schools are already doing it.

INTEGRATING NEW CHANNELS

Think about all the ways you can reach and recruit new students. You can meet them at a student fair, or they can be referred to you by a trusted agent. You can connect through your website or on social media, or perhaps through an active link with a partner school or government organisation abroad. As illustrated in the chart at right, there are several distinct channels through which students are recruited every day.

Most educators can look at this range of channels and quickly realise that they tend to emphasise one or two of these methods. Perhaps your strategy is based on a strong agent network, or maybe you specialise in online channels.

Just as quickly, you can probably also identify one or two channels in which you have noticed potential and have considered investing more time and effort – school partnerships, for example, or perhaps a distinct alumni programme for your international graduates.

This is where the opportunity arises in terms of greater reach and effectiveness: the chance to incorporate new, complementary channels in a way that enables each to reinforce and build on the other as the student progresses from inquiry to application to admission to registration and, ultimately, to graduation.

KEEPING IT REAL

Does a more broadly based, integrated recruitment strategy necessarily place unmanageable demands on your staff and budget? No. It would be as easy to think that building a new alumni programme is too much work, or that you'll never have time to cultivate and support new institutional partnerships. Best practices are always scalable. Most educators could not quickly ramp up their efforts in each



**7 distinct channels
through which
students are
recruited every day**





of these channels at once. The key is to carefully choose and integrate a manageable number of recruitment channels, and in a way that is sustainable over time.

For example, maybe it's not possible for your institution to build a fully featured global alumni programme today. But perhaps you could begin by creating a basic contact database for graduating students, or even organise an annual reception for alumni in a key sending market. If you don't have time to scout the world for new institutional partnerships, perhaps you could formalise or expand an informal connection with a school that is already in your network.



24/7 RECRUITING

The goal is to build a recruitment strategy in which each element is connected to all the others. If you went to an education fair in Brazil, for example, you would be well prepared to refer students to local agents or alumni. You might also have a highly efficient system for collecting leads, following up quickly with interested students, and connecting them with your offline and online networks – including agents, alumni, and social channels.

The ideal is that even when the entire recruitment team has left the office, a student is still being recruited somewhere in the world. This happens when you've built great local networks or leveraged your online marketing to the point where a student can be productively engaged throughout their decision-making process.

THROUGH A STUDENT'S EYES

To make this all more concrete, let's consider what the typical decision process looks like for an international student. Study abroad is of course a huge decision for the student and his or her family, and one that usually unfolds over an extended period – most often a year or more.

To borrow a specific example from the enrolment management services company UniQuest, the illustration on page 43 maps the experience of an actual Indian student who enrolled for a degree programme in the UK in autumn 2017.

You'll notice two things right away. First, there were roughly 15 months between the student's initial inquiry and her first day on campus. And second, the prospect was extensively and consistently engaged by the university that entire time.



Even when the entire recruitment team has left the office, a student is still being recruited somewhere in the world





There is plenty of room in this model to refer the student to a local agent or to connect her to a current student or alumnus

The sheer frequency and duration of follow-up communications illustrated here is what increased competition looks like at the level of an individual student.

We can infer a few things from this example in terms of the university's recruitment strategy. First, this institution's systems are highly responsive to inquiries. Along with more personalised follow-ups, the student's initial contact in June 2016 triggered an automated series of outbound email messages, with topics ranging from basic information about the university's programmes to details about how to apply and links to virtual campus tours.

Note the automated aspect of this initial response. The student received a carefully structured series of messages over a period of months. This approach is well supported by more sophisticated service providers and customer relationship management (CRM) systems. It can also be accomplished at a basic level with affordable and easy-to-use email applications, such as MailChimp or Campaign Monitor. Also of note here are the tailored one-to-one mails and other communications – an effort that relies both on dedicated staff time and sophisticated lead management systems, in this case underpinned by the UniQuest platform.

The illustration also demonstrates that the initial response to the student was also connected to the university's attendance at an education fair in her home city. She attended the fair in November 2016, roughly six months after her initial inquiry, and subsequently applied for admission in January 2017.

Finally, it appears that the university was very effective in incorporating other communication channels, including a live chat function on its website and one-to-one messaging via WhatsApp. The variety and frequency of contacts here suggests that these channels are well connected with other outbound communications to prospects, and that the institution can adapt easily to whatever mode of communication works best for the student.

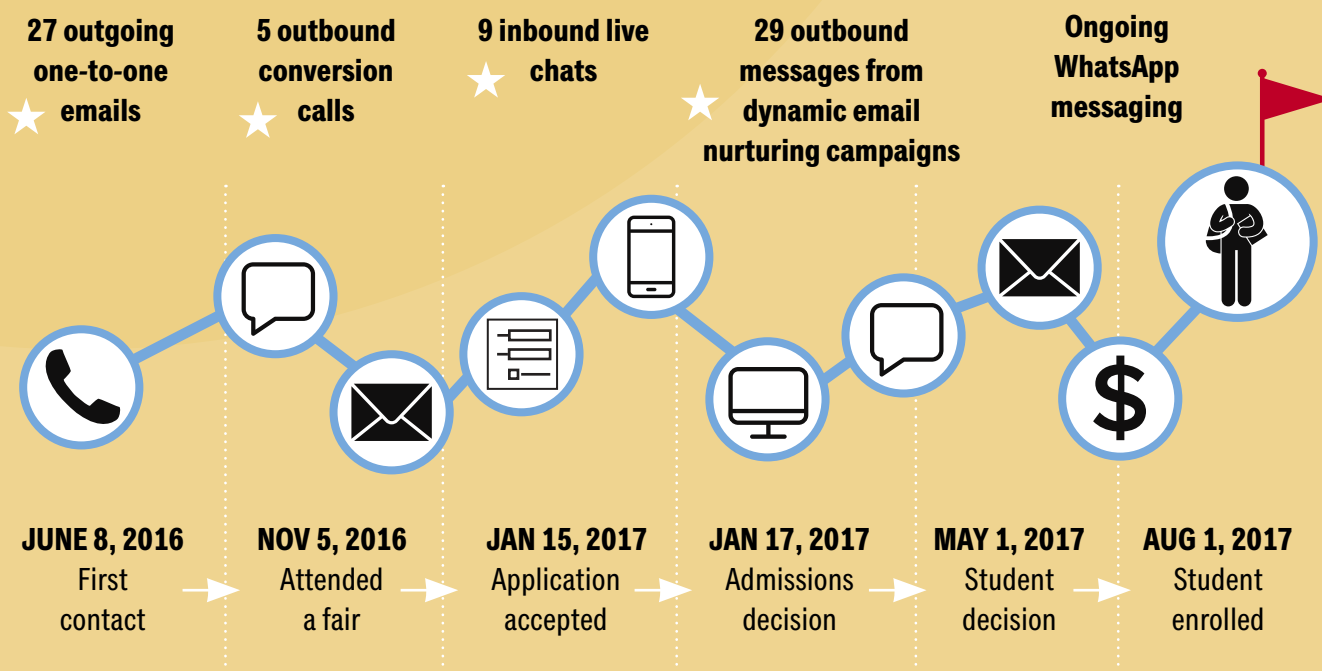
In all respects, this example suggests an institution with a highly integrated recruitment strategy in which each element flows smoothly to the next, in this case from an inquiry mechanism to an outbound email programme to attendance at a student fair and a variety of other communications. It is likely that there is plenty of room in this model to refer the student to a local agent or to connect her to a current student or alumnus.

The result (aside from a successfully recruited student, of course) is a highly responsive, flexible, and efficient effort that moves the prospect from inquiry to enrolment. Each individual part of the strategy is well thought out and thoroughly integrated with all others.



MAPPING THE STUDENT JOURNEY

This real-life example shows how effective an integrated marketing strategy can be



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BEEN THERE, DONE THAT

Alumni can greatly influence the choices of prospective students – leverage that potential!



“Students who’ve completed their studies aren’t just graduates, they have the potential to have a lifelong relationship with the institution.”

There’s a paradox at work regarding the extent to which many colleges and universities are engaging with their international alumni. A 2017 survey undertaken by international education consultancies Academic Assembly and Intead found that the majority of college administrators felt that their institutions are not doing enough to connect with international alumni. Nearly two-thirds reported having no dedicated staff time for global alumni relations. Yet survey respondents were highly aware of the role alumni can play in recruiting students: more than half considered global alumni management to be “very important” to their recruitment and branding efforts.

In that, they’re quite right: alumni can add a powerful personal element to a marketing programme. Former students have first-hand knowledge of what it’s like to study at a college or university, and that’s exactly what prospective students are looking for in making study abroad decisions.

“Students who’ve completed their studies aren’t just graduates,” says Gretchen Dobson, one of the primary authors of the report and the president of global alumni relations with Academic Assembly. “They have the potential to have a lifelong relationship with the institution.”

Alumni as brand ambassadors

Investing in international alumni relations allows educators to leverage the support of former students. “Alumni based overseas can be engaged, for example, to deliver independent talks in schools and colleges, extending the institution’s reach into areas where recruitment officers may not operate,” says Nicholas Miller in a report for the UK’s Higher Education Academy. “International alumni can also serve as ambassadors, engaging with prospective international students and their parents to help boost recruitment efforts and grow connections overseas.”

The graphic, at right, highlights how alumni add a critical element of authenticity to an institution’s recruitment effort.

Five steps to building an alumni relations programme

1. SEEK BUY-IN FROM SENIOR LEADERSHIP: Ms Dobson, who led international alumni efforts at Tufts University for a decade and now consults and writes widely on the subject, notes that the more support there is for an alumni strategy, the more successful it will be.

2. GET ORGANISED: The Academic Assembly/Intead report recommends establishing a budget, and ideally, “establishing a cross-functional team from admissions, advancement, international programmes, and career services for grassroots alumni engagement.”



HOW ALUMNI CAN STRENGTHEN RECRUITMENT STRATEGIES

Alumni add an authentic voice students want to hear when considering where to study. Combined with the efforts of academic staff and international student recruiters, alumni offer amazing representation for schools and universities in overseas markets.

ALUMNI ...

- Speak from experience
- Communicate in students' native language
- Are often aware of job opportunities in their home country/field of study
- Understand the culture and concerns of international prospects
- Promote the alumni community at the institution

AUTHENTICITY



CREDIBILITY



ACADEMIC STAFF ...

- Speak knowledgeably and in detail about academic programmes
- Offer specialised knowledge students and parents need when making decisions
- Often have conducted research or have teaching connections in the target country
- Create a connection that students can look forward to continuing when they arrive on campus

EXPERTISE



INTERNATIONAL RECRUITMENT OFFICERS ...

- Have the latest market intelligence
- Possess a network of contacts and agents in the target market
- Connect regularly with international students
- Have current and relevant institutional knowledge
- Use processes to follow up with prospects



Engaging with alumni means not just asking them for help, but also being responsive to what they need

3. DON'T LOSE TRACK OF YOUR GRADUATES: Ms Dobson advises educators to put some good, basic data systems in place to log information about international graduates. Her report suggests classifying international graduates as “transnational alumni” who may go on to further work or study in the US or a third country, and/or return to their home country over time – all possibilities that hold potential for them to be brand ambassadors. Every year, alumni should be invited to update their contact information.

4. CONNECT WITH THE STUDENTS YOU HAVE NOW: Anne Hayner, the associate director for alumni relations with the University of Notre Dame's Kroc Institute for International Peace Studies, points out that alumni relations begin with current students. “Start with the students you have now,” she says. “Connect with them and make sure they feel connected to you.” International networking and engagement with foreign graduates are both central to the institute's programmes, and Kroc has a long-established and active network of global alumni as a result.

5. START SMALL AND BUILD FROM THERE: Commit to making international alumni part of what your institution does, and understand that first steps lead to more steps. Ms Hayner points out that any institution can begin to strengthen its efforts in this area, even with modest budget or staff resources.

Engaging with your alumni network

Engaging with alumni means not just asking them for help, but also being responsive to what they need, notes Ms Hayner. “Ask people what they need or want,” she suggests. “For example, part of my job is to help the students professionally network. So we keep them advised of what people are doing in the field through professional or alumni profiles, and we help them to stay connected to faculty or research resources so that they can stay on top of contemporary scholarship in the field.”

Recognise effort

Writing in NAFSA's *Guide to International Student Recruitment*, Aaron Zdawczyk points out that “Most alumni programmes are volunteer-based, so the opportunity for the graduate to represent his or her alma mater in the community and to engage with local students and families is often reward enough. However, developing a public system of recognition to highlight exceptional efforts and commitment is [a valuable step in keeping] alumni excited and energised.”

Some institutions are going so far as to reward alumni monetarily for direct referrals. Vancouver Island University, for example, offers a \$300 “thank you” to current students and alumni if they refer an international student and that student is accepted and attends a full semester of ESL, undergraduate or graduate studies at VIU. This real-life example is a powerful testament to the immediate impact on enrolments that an alumni's vouching for an institution can have.



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BOUNDLESS POSSIBLE IN AUSTRALIA'S NORTHERN TERRITORY

When people talk about Darwin – the capital of Australia's Northern Territory and the country's only tropical city – they often use words like “relaxed,” “unhurried,” and “laid-back.” The city and its region certainly are all of those things, but that is only part of the story of The Territory, which is closer to Asia than it is to Australia's other major centres to the south.

Darwin offers a dynamic multi-cultural setting, a warm and welcoming community, and the unforgettable combination of a lively city with ready access to adventures in the nearby world heritage sites Kakadu National Park and Uluru/ Ayres Rock.

“I had a set of things I needed from a university as well as from a city and Darwin had it all,” says Abhishek Lall, who came from India to pursue a Master of Engineering degree at Charles Darwin University. “A vibrant city with amazing sunsets and amazing opportunities is what I saw at first. When I arrived in the Northern Territory I notice how welcomed I was with all smiles wherever I went. The university campus was beautiful and the professors are lovely. They are always available to help and as a student I could not ask for more.”

ICEF announced earlier this year that Darwin will host the Australia New Zealand Agent Workshop in April 2019. ICEF vice president Rod Hearps sees the northern city as an ideal study destination: “Darwin has many advantages to offer international students and education agents when compared with other Australian and international cities, including lower tuition fees, more affordable living costs, more accommodation options, and less competition for part-time jobs.”

As the gateway to the region and the Northern Territory's commercial centre, Darwin offers a wealth of employment opportunities for visiting students and is easily accessible with direct flights from Singapore, Shenzhen, and all major Australian cities. The region also boasts a wide range of high-quality education providers, including Charles Darwin University, which is ranked among the top 2% of institutions worldwide and 31st in the *Times Higher Education* table of universities under 50 years old.

“Northern Territory has offered me the opportunity to meet and network with other students from all over the world, allowing me the chance to discover diverse cultures in a positive and supported

environment,” says Manfred, an Estonian student pursuing a Diploma of Leadership and Management at BCA National. “Outside of the classroom I work in a café as a supervisor where I can apply my studies in the work environment. I love Darwin because it reminds me of my country's capital, Tallinn. Everything is in eyesight and there is always something to do.”





THE NEW RULES OF



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DIGITAL MARKETING

How to build an online strategy that informs, engages, and attracts international students to your institution



BOTH AGENTS AND

educators have reported a steady increase over the past three years in the number of students recruited via digital channels. In the 2017 edition of the ICEF i-graduate Agent Barometer, for example, one in five agents reported that 60% or more of their leads came from online sources. Roughly another third of agents indicated that digital channels now generate between 30% and 60% of all new business.

Despite online recruitment being relatively new, research and experience in this area are growing and we are now much more aware of how prospective students use digital channels to seek and select overseas study options.



THE NEW RULES



Lead with mobile

Students use mobile devices heavily during the discovery phase of the college search process. In many markets, the majority of prospects make their first visits to college websites on their mobile devices. Significant proportions even apply to institutions from their phones. Institutional websites must therefore deliver an excellent mobile user experience. Required information – including details about programmes, admissions, and student life – must be easy to find. Key conversion points, including inquiry and application functions as well as a prominent “book now” or “apply now” button, should be well optimised for mobile.



Different channels at different times

There is a distinction to be made between digital tools – such as online search and school selection sites – and social media. Research from Chegg has demonstrated that the former are highly influential in the discovery phase of students’ research, when students are learning about different institutions and trying to identify schools that could be a good fit. Social media then typically comes into play after that initial discovery process as students investigate their choices more fully.



The importance of unbranded search

Google research consistently finds that unbranded search is very common in the early stages of prospective students’ discovery process. As many as 9 in 10 prospects don’t have a particular school in mind when they begin their search process and their search behaviour reflects this lack of brand orientation. Rather than searching for a specific institution, for example, prospects are far more likely to search by programme name or type, often in association with a particular country or region (e.g., “bachelor’s degree in computing science in London”).



A big role for social

How and when students use social media varies from country to country. In some markets, such as China and Russia, home-grown social networks are the clear leaders – for example, WeChat and QQ (Qzone) in China and VK (VKontakte) in Russia. In other countries, the major global platforms dominate. Facebook, for instance, has been widely adopted in the Middle East, with 89% of web users active on the platform.

In terms of how students search and make decisions as they plan for study abroad, social media channels are most commonly used to gather recommendations and to open a window into student life at a particular institution or school. In other words, prospective students use social channels in part to see if they would fit in and be comfortable on a campus or in a community.

Social is also a fluid space and the popularity of individual platforms can shift quickly (see “Why Instagram is the perfect place to connect with students,” page 75); yesterday’s must-attend online spaces can suddenly feel old. The rules of engagement between brands and students are often in flux as well.

For marketers, this means that social media strategies need regular tune-ups to keep pace with fast-moving and mobile audiences. It also means keeping in mind that all social content should be designed with student audiences in mind. The 70/20/10 rule is a great guideline in this respect: 70% of social posts should be designed to entertain and engage (e.g., vignettes of campus life, videos, jokes, student commentary), 20% of content should be useful information (e.g., deadlines, policy updates, new programme announcements), and 10% should be collaborative (e.g., calling for opinions, participation in online polls, or other student content).



Keep your eye on your own website

Despite all the emphasis on search marketing, social media, and other digital channels, the institutional website remains a key platform for student recruitment. In one recent study from QS, 9 in 10 prospective students in the UK rated such official sites as “essential” or “very important” in their search and decision-making process.

With students still relying heavily on the institutional website, it’s crucial to highlight the information they need the most. A large percentage of respondents in the QS study reported having trouble finding admissions information or course details on institutional sites. Internet users are notoriously short on patience, and this is particularly the case for millennial users on mobile devices. Google research has found that 6 in 10 mobile users will leave a site if they don’t find what they are looking for immediately. This reflects the observation of one prospect in the QS survey, who said, “If a lot of the detailed information is missing [on a website], I choose not to apply.”



Make it personal

Finally, remember that student recruitment is often highly personal and the product of meaningful connections between students, educators, institutions, agents, and other partners. Use technology not as a substitute for people but rather as a way to reflect and reinforce those personal connections. This means being responsive and agile in your use of social media and other online channels, and not shying away from opportunities to incorporate a personal voice in online interactions. As social media specialist Eric Stoller advised at the 2017 NAFSA conference, “Invest the same passion, energy, commitment, and intention [in social] as you would in any other communications channel.”



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Consider for a moment the number of higher education institutions in three leading destinations for international students. Australia: 43, the UK: 162, and the US: 4,700+. That's right ... more than 4,700! With all that choice, how can international students find a US college or university that's right for them?

Why university rankings don't tell the whole story

World and national university rankings are one way to begin the search, but they are problematic. For example, *U.S. News & World Report* national rankings are based on scores in a number of categories – and 22.5% of the overall ranking is subjective. That 22.5% is the category called “undergraduate academic reputation,” and it's based on the opinions of presidents, provosts, deans of admissions, and high school counsellors who may not be familiar with many of the schools they're asked to rank. The national rankings also take into account factors that may not matter to international students, such as “alumni giving.”

Perhaps most importantly, the national rankings compare only those universities offering multiple

doctoral degrees and conducting significant amounts of faculty-led research. Regional rankings, therefore, can yield information that national rankings do not. For example, national rankings might not include a college in Florida with one of the best graphic design departments in the country because that programme-specific information wouldn't factor into a national ranking score. That same college might score highly on a regional ranking, however, which is why regional rankings should factor into students' decision-making. For the international student dreaming of being a graphic artist, enrolling in an excellent programme at one of America's top regionally ranked schools would be a wise decision.

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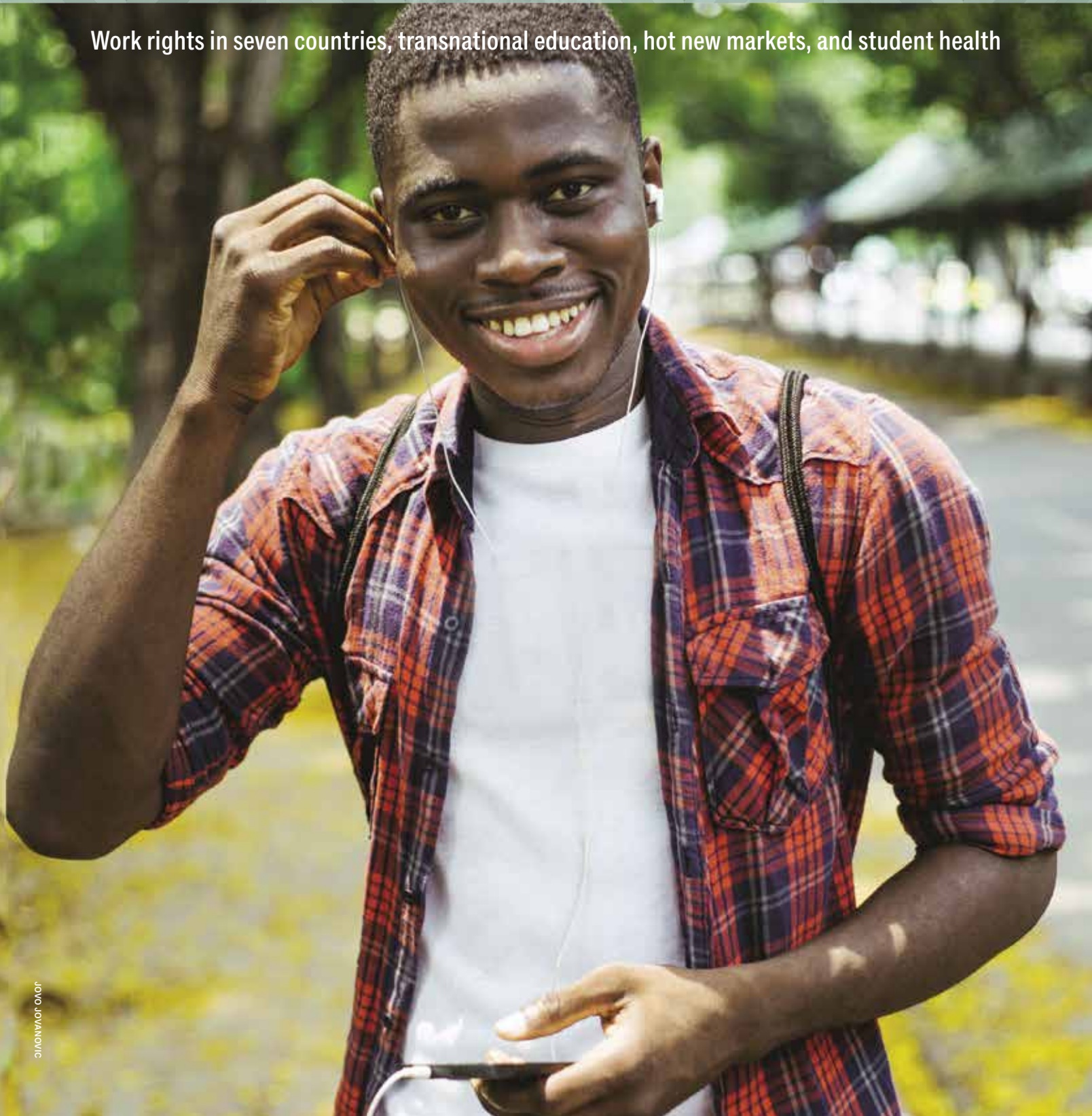
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TRENDS

Work rights in seven countries, transnational education, hot new markets, and student health



JANO JOVANOVIC



WANTED: STUDENTS WHO STAY

These seven countries are making it easier for international students to get a visa, work, and immigrate after graduating



It is now widely understood that international students provide value to local and national economies that far exceeds the fees they pay for their education. For example, in 2016, international students spent \$15.5 billion on tuition, accommodation, and personal spending in Canada. And in the UK, researchers have found that every ten non-EU students contribute a net impact of nearly £1 million (US \$1.4 million) to the economy.

Beyond tuition and living expenses, international students have great long-term potential to boost the economies of the countries in which they study if they are able to work after graduating and even to immigrate.

This potential is especially valuable in countries with ageing populations that exert downward pressure on productivity and economic growth, and those population characteristics are prevalent in most developed nations. As a result, policies aimed at encouraging international students to stay on after they graduate are increasingly common. This trend dovetails nicely with the fact that for many students, work opportunities influence where they choose to study abroad.



Here's a look at what seven countries are doing today to attract international students and to make it easier for them to work after graduating.

1 IRELAND

Ireland's goal is to host 44,000 foreign students in higher education institutions by 2019/20. In 2016/17, enrolments were 43,600, a jump of nearly one-third over the total in 2014/15 (33,100), so it seems almost certain that Ireland will meet its target.

Immigration Policy: In 2017, Ireland extended the length of time master's-level and PhD graduates can stay in the country to seek employment to 24 months. In addition, Ireland's Third Level Graduate Programme allows international graduates to immigrate provided they have been offered a job for at least two years at a certain salary or a job that is on Ireland's list of highly skilled occupations.

2 CANADA

Canada hosted 494,000 international students in 2017 – 20% more than in 2016 and surpassing its 2022 target of 450,000 foreign students enrolled. The latest IDP Student Buyer Behaviour Survey found that students think Canada is the best destination for post-graduate work opportunities – ahead of the UK, Australia, New Zealand, and the US.

Immigration Policy: In 2016, Canada adapted its permanent residency programme, the Express Entry system, to make it easier for international graduates to immigrate. A new scoring system – including points awarded for study in Canada – gives international graduates a much better chance of being granted residency.

3 JAPAN

Japan's goal is to host 300,000 foreign students by 2020; as of 2017, over 267,000 were enrolled. In addition, Japan wants to raise the employment rate of foreign graduates from the current 30% to 50% by 2020.

Immigration Policy: The Japanese government is

offering new incentives such as subsidised company internships, help with finding jobs on graduation, stepped-up Japanese language courses, and more streamlined processes for work visas after graduation.

4 CHINA

China's goal is to host 500,000 foreign students by 2020, and that target will almost certainly be met: Chinese universities and schools hosted almost 490,000 students in 2017, an increase of 10.5% over the previous year.

Immigration Policy: In 2017, the Chinese government introduced a new policy allowing foreign students with post-graduate degrees or higher from Chinese or "well-known" foreign universities to be offered employment within a year after graduation. Previously, it was almost impossible for foreign students to find work in China.

5 MALAYSIA

Malaysia aims to double its international enrolments from more than 135,000 in 2014 to 250,000 by 2025. In 2016, Malaysia enrolled 172,900 international students – 132,700 of them in higher education.

Immigration Policy: Though widely considered to have one of the world's most developed international education strategies, Malaysia was until recently also known for being a frustrating place to get a visa. But in 2016, the Malaysian government, in partnership with Education Malaysia Global Services (EMGS), launched the EMGS mobile app to make the process easier.

6 TAIWAN

In 2014, the Taiwanese government established a goal of attracting 150,000 international students in 2020. But progress was slow, and enrolment growth flattened to 0% in 2016/17, a development largely attributed to tension with mainland China. In 2016, the Taiwanese government narrowed its focus to help meet its overall target and developed a plan – dubbed the New Southbound Policy – to more than double the number of South



and Southeast Asian students from 28,000 to 58,000 by 2019.

Immigration Policy: In 2016 Taiwan introduced streamlined visa applications and made it easier for international students from places like Australia, Bangladesh, Bhutan, India, Nepal, New Zealand, Pakistan, and Sri Lanka – as well as other ASEAN countries – to apply for work visas after graduating. Scholarships for students from these countries are also a key part of the New Southbound Policy.

7 AUSTRALIA

In 2017, Australia enrolled fully 624,000 international students, a 13% increase over 2016. Its goal for 2025 is 720,000.

Immigration Policy: In 2016, Australia streamlined its visa policy to make it easier for international students to get into programmes offered

International students provide value to local and national economies that far exceeds the fees they pay for their education

by ELICOS English-language schools and vocational (VET) institutes. Previously, applicants to these types of programmes were subject to more complicated and restrictive visa rules than international students applying to Australian universities. The revised policy has played a major part in boosting enrolments in the ELICOS and VET sectors and international enrolments in Australia in general.



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In today's digital age, smartboards and online tools are present in most classrooms. Take a look inside any number of schools and you will see students hunched over screens, navigating the world one click or swipe at a time.

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ACROSS BORDERS... AND BACK

What's the link between offshore delivery and on-campus recruitment?



Right now, there are more international students studying for British credentials *outside* the UK than there are international students studying *in* the UK. That's just one illustration of the extent to which transnational education (TNE) is changing the nature of education exports. TNE activity is definitely surging across the globe, and British educators are not alone in their growing interest in TNE delivery models.

WHAT IS TNE?

While the terminology used to describe transnational education varies, the different modes and definitions all centre on education providers delivering programmes across national borders. Most often, TNE programmes lead to full or partial higher education credentials, and they are always delivered (at least in part) in students' home countries. For students, TNE offers a way of obtaining foreign credentials without needing to travel to another country for the whole of their studies, a compelling draw for the many students for whom affordability is a crucial determinant of how – and whether – they can pursue a foreign degree.

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TNE delivery models include:

- **Licensing or franchising arrangements**, where the exporting, degree-granting institution licenses an offshore partner institution to deliver its programme(s) overseas.
- **Joint programmes**, where students complete some or all of their programme in their home country – delivered by an offshore partner institution. In such cases, students often travel to complete their studies with the degree-granting partner abroad.
- **International branch campuses**, where the exporting institution develops a free-standing campus offshore and awards degrees to local graduates.
- **Distance education**, where the exporting institution offers its programmes online and students pursue their studies independently and/or with the support of a local partner institution in their home country.



JOINT PROGRAMMES ON THE RISE

International branch campuses (IBCs) often attract the most attention and have the highest profile within the broader landscape of TNE. A 2016 report from the Observatory on Borderless Higher Education (OBHE) found that there were 249 IBCs worldwide at that time, enrolling an estimated 180,000 students. IBCs are heavily

concentrated in Asia and the Middle East, with China the leading host of branch campus operations and the UAE a close second.

Setting up full branch operations abroad carries significant reputational and financial risk, however, and exporting institutions have shown more caution in pursuing international branches over the past three to five years.

On the other hand, joint programme activity is expanding. Joint programmes can be implemented at a manageable scale – in sharp contrast to branch campuses – and grown over time. They offer less risk for participating institutions than do branch campuses and they boost enrolments for both the local partner and the degree-granting institution abroad.

Online delivery and distance learning, which are also relatively low-risk modes of delivery, are other areas that are expanding in the TNE space.

A GROWING AREA OF FOCUS

For a number of countries, TNE is becoming as important as on-campus operations in terms of revenue, branding, scale of activity, and enrolments. British providers' combined TNE enrolments have grown from just under 200,000 in 2008 to nearly 710,000 as of 2016 (including both full- and part-time enrolments). That there are around 445,000 international students studying full-time in the UK – i.e., studying abroad in a traditional delivery model – shows just how significant those 700,000+ TNE enrolments are for the British institutions claiming a share of them. It is not surprising, then, that the UK government has indicated that it will support an increased focus on TNE delivery in the years ahead.

The same can be said of Australia, whose government released a 10-year blueprint in 2016 for further expansion of its international education sector. That strategy heavily emphasises TNE as an area of growth and includes plans for the expansion of offshore enrolments in online and blended delivery programmes.

In France, meanwhile, there is growing recognition among both government officials and education leaders that the country should expand its relatively modest TNE footprint. A 2016 government report calls for a national TNE strategy geared at expanding France's share of the offshore delivery market.



BRINGING STUDENTS BACK ONSHORE

The attraction of TNE for exporting providers is two-fold. First, offshore programme delivery is a form of internationalisation in itself, allowing educators to build institutional and community links in offshore markets and add a new revenue stream.

Second, TNE provides the opportunity to drive enrolments back to the exporting institution's home campus. Students who begin their studies offshore naturally represent a prospect pool for qualifications at the home campus. In this sense, TNE is a highly efficient recruitment channel for the exporting institution. A recent report from the Higher Education Funding Council for England estimated that around one-third of new undergraduates at English universities transfer in from TNE initiatives such as joint degree programmes and branch campuses.

This vividly illustrates the potential of TNE as well as the experience of many exporting

providers with effective offshore programmes in place. It also counters a hypothesis that the increased availability of higher education programmes offshore could curb outbound mobility from TNE host markets. There is not a great deal of research in terms of this type of "substitution effect" of TNE. But the OBHE has looked at the question carefully and concludes that "outbound mobility of students from TNE host countries appears to remain either unaffected or grows."

There is perhaps no better example of this pattern currently than the UK, which has seen its volume of TNE programming grow dramatically over the past several years while also creating a stable and efficient flow of inbound students to British campuses via those offshore programmes. This clearly demonstrates the potential of TNE as a powerful and complementary recruitment channel within a broader international education strategy.



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THE NEXT FIVE MARKETS

Diversification strategies are now in full swing at many institutions. These are the emerging markets we're beginning to hear more about.



University of Dhaka, Bangladesh

BANGLADESH



Bangladesh is now one of the most important emerging markets for study abroad in South Asia, and it currently sends out more than 63,000 students for higher education. It is the eighth most populous country in the world, with nearly half of its 160 million citizens under the age of 24 and just over a third under 15.

The country's middle class is expanding rapidly, and consumer confidence is rising. A recent Boston Consulting Group (BCG) survey of Bangladeshi consumers found that 60% expected their incomes to rise over the next 12 months.

But Bangladesh is only now making it onto the radar of foreign companies and universities, a fact alluded to in the title of the BCG survey report: *Bangladesh: The Surging Consumer Market Nobody Saw Coming*. Zarif Munir, a partner in BCG, says, "Companies that move now to get into position have an opportunity to build a lasting competitive advantage."

The landscape for recruitment in Bangladesh is changing quickly. Currently, more than half of Bangladeshi tertiary students go to Malaysia, but students are also choosing China, the US, the



UK, Canada, and Australia as well as an increasing range of emerging destinations in Asia, the Middle East, and Europe. Engineering and medical degrees are currently popular, and students are highly motivated by scholarships and affordability in general.

NEPAL



Nepal's economy is growing quickly, with GDP growth of over 7% in 2017 and projected growth of 5% in 2018 – a remarkable recovery after 2015's devastating earthquake. But the earthquake inflicted severe damage on the country's educational infrastructure, a further blow for young Nepalese already frustrated by a university system that many say is failing to link degrees to employment. An article in the *Kathmandu Post* notes that "This contributes to a bleak outlook for students who study in Nepal ... many of our students obtain degrees not knowing what to do after graduation."

And so young Nepalese are going abroad; more than 44,200 Nepalese are currently enrolled in foreign higher education, with Australia, the US, and India claiming nearly two-thirds of this total. Nepal is the second-largest sending market in South Asia for the US after India, and the fastest growing market overall (20% in 2017). In Australia, Nepalese enrolments grew by 60% from 2016 to 2017. More than 23,000 Nepalese are studying in Australian institutions today.

While there are fewer Nepalese students abroad than Chinese, Indians, or Vietnamese, Nepal's outbound mobility ratio (i.e., the proportion of international students in its overall student population) is higher than the ratios of those big sending countries.

According to the World Bank, university-aged Nepalese made up more than a third of the total population in 2016 and the British Council expects Nepal to be among the top ten countries for growth in the 18–22-year-old bracket over the next five years.

GHANA



Ghana's GDP has risen faster than any other in Sub-Saharan Africa over the past decade, and analysts believe that in 2018, it may

surpass even India's growth rate. However, growth has been fuelled mostly by oil revenues and masks a history of underinvestment in the rest of the economy, including education.

Faced with a labour market in which there are an estimated 200,000 unemployed graduates but limited job opportunities beyond those in extraction industries, Ghanaian students are increasingly seeking to study abroad. Outbound students – most of whom are studying in China, the US, or the UK, with the balance distributed among institutions in Canada or Europe – number around 12,400.

As in the rest of Sub-Saharan Africa, cost is the most prohibitive barrier for Ghanaians with dreams of an overseas education. The US is comparatively expensive, and universities from a growing list of countries are beginning to recruit in Ghana. The Ghanaian newspaper *Joy Online* recently noted that "It has become common for agents of schools in the United States, United Kingdom and other parts of the world to travel to Ghana to meet prospective students face-to-face. It is in sharp contrast to the past when people had to struggle, either to travel abroad for admission or have relatives abroad facilitate the process for them."

KUWAIT



Newsweek Middle East recently compared the cost for Kuwaitis of higher education in Kuwait versus the cost of studying overseas.

For many fields of study, it is actually more affordable for Kuwaiti students to study overseas: "The price tag for studying certain majors in Kuwait can be as much as double the price of studying the same major abroad."

Add to that the facts that Kuwait's major public university, the University of Kuwait, has a serious overcapacity problem, that its private universities offer limited master's-level programmes and no PhDs, that 15–34-year-olds represent more than a third of the population, and that many Kuwaiti families are very wealthy ... and you have a recipe for high demand for study abroad.

Kuwaiti government statistics show that 33,000 Kuwaitis are studying abroad today, with the bulk of students in the US (12,000), Egypt (8,500), and Jordan (6,000). The remainder are in the UK



(4,000), UAE (3,000), and Bahrain (2,500), with smaller numbers in Australia, Ireland, Saudi Arabia, France, and Lebanon.

The Kuwaiti government offers thousands of scholarships per year for students wanting a foreign education. In addition, many students are self-financed through the spending power of Kuwaiti families.

EGYPT



Egypt is a fascinating market in international education today: an important sender of students as well as an emerging hub for students in the region. It's also noteworthy because of where its students choose to study abroad: everywhere.

The latest UNESCO data counts 29,000 Egyptians abroad for higher education. Here's the spread:

- More than 5,200 in UAE;

- More than 4,800 in Saudi Arabia;
- Close to 3,000 in the US;
- Close to 2,000 in France;
- Roughly 1,700 each in Germany, Qatar, and the UK;
- More than 1,000 in Malaysia, Canada, and Jordan.

All this means that Egyptian students are considering a wide range of options for study abroad. In 2017, Egypt's *Daily News* reported on a survey by Edarabia, a firm that helps Egyptians choose where to study. The survey showed that the US is losing ground to other countries, and that the most preferred destinations for Egyptians now are Canada, Australia, and the UK. The US is fourth, followed by Ireland, France, Spain, Italy, Germany, and New Zealand – still more evidence that the playing field is remarkably open in Egypt, a country where 40% of the population is under age 18.



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PROMOTING MENTAL HEALTH ON CAMPUS

How to support international students' mental health and help those in distress



International students go abroad to study, but they also go abroad to immerse themselves in a different culture and make friends. They take with them a host of expectations, needs, and concerns, some of which overlap with issues domestic students face. But some are different.

For example, all students may find it difficult to adjust to a new academic and social environment, but international students may have an additional set of challenges, such as:

- Culture shock and/or significant homesickness;
- Language barriers;
- Uncertainty about how to find friends who share their religion, language, or culture;
- Prejudice or other forms of discrimination or exclusion.

These challenges can negatively affect students' experience studying abroad, and when the challenges are severe, they can be so devastating that they cause students to abandon their studies. Research conducted by the Association



for University and College Counseling Center Directors in the United States has found that depression is the number one reason for students to drop out of school.

Such outcomes are both highly distressing for the students concerned and damaging to the reputations of the institutions hosting them. However, there are ways of reducing their occurrence. Knowing that students' overall satisfaction is strongly determined by their experience of campus life and aware of a growing epidemic of depression among youth, leading institutions and schools are increasingly prioritising mental health. They are designing comprehensive support services that anticipate a full range of potential challenges for international students, adopting a proactive approach to mental health.

Mental health concerns affect many students

Facts like these highlight the great need for strong supports for students.

- More than one-third (36%) of international students responding to a 2017 study of 2,000+ students enrolled in British institutions said they had "poor mental health" and more than half (55%) of those students said they had been affected for more than two years.
- In 2016, the American College Health Association's National College Health Assessment found that 60% of students had "felt hopeless" in the past 12 months and 44% "felt so depressed that it was difficult to function."
- In 2017, a well-ranked Canadian university found itself the subject of intense media attention when students raised a petition to demand better mental health services on its campus. The student movement followed several suicides on campus in the span of one academic term.
- A 2015 study determined that early treatment for students enrolled in California's public universities and community colleges would enable an additional 329 students to graduate each year as a result of improved mental health and would yield a \$6.49 return on every dollar spent.

BEST PRACTICES

Institutions that are serious about international students' mental wellness align mental health support with their overall strategic goals and resource allocations, ensuring that:

- As soon as students arrive, orientation sessions reassure them that there is no stigma attached to mental health issues and encourage them to seek help for such concerns;
- Students – and their parents – know exactly what services are available to them should they experience psychological distress;
- A number of staff are trained in basic mental first aid for youth;
- They provide an online self-administered form that students can use to help them recognise symptoms of mental illness they may be experiencing;
- Students dealing with mental illness can access culturally sensitive care in their native language;
- An early detection system is in place for recognising mental health problems when they first arise;
- All faculty are trained in understanding symptoms of mental illness and know what procedures to follow to support students;
- Both immediate and long-term resources are available to students.

Some institutions go much further than these basic requirements, with some integrating a vast network of initiatives and resources into their operations. For example, at the University of Victoria in Canada, support services are informed by faculty specialising in student mental health, and a data system is in place to track mental health issues and responses on campus. Ramapo College of New Jersey holds wellness fairs for students to provide a fun environment in which to emphasise how important sleep, exercise, and nutrition are to students' health. New York University screens for depression at all primary care appointments. Worcester University in the UK offers a range of wellness supports ranging from short-notice emergency help all the way to "fancy a cuppa" drop-ins for students feeling lonely and having trouble making friends.



Universities in several countries are participating in the famous Nightline service founded in the UK and Ireland, a “confidential, anonymous, non-judgmental, non-directional, and non-advisory listening service for students, delivered by students.” Thousands of specially trained students volunteer for the service, now spread across Australia, Canada, Germany, Ireland, Switzerland, the UK, and the US.

There are scores of examples of institutions providing excellent mental health services for students, and more are doing so all the time. With some experts advocating for university mental health rankings, and a newspaper as esteemed as Britain’s *The Guardian* offering its own guide for students wanting to know how good an institution’s mental health supports are, there is no doubt that this element of student services will only increase as a priority for institutions and schools of all types.



Durham NightLine’s Instagram post offers a reassuring message to students.



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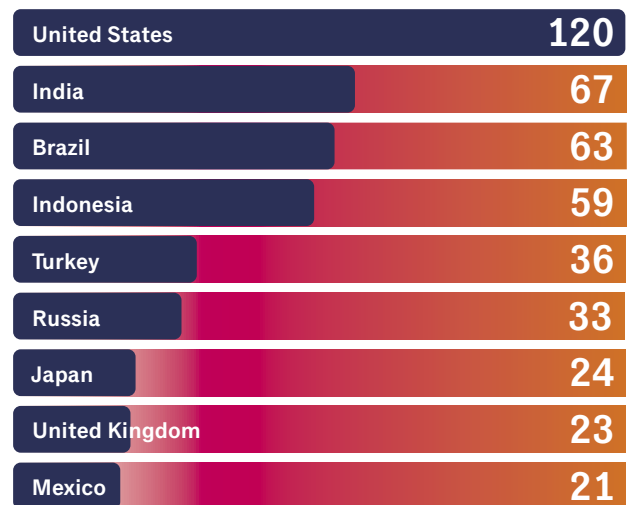
1. Why Instagram is the perfect place to connect with students

Photo-sharing platform Instagram has grown explosively over the past couple of years, moving from a user base of 500 million in June 2016 to 800 million just over a year later. Students in particular love the platform. The 2018 Voxburner Youth Trends Report for 2018 reveals that “43% of our survey respondents post on Instagram at least once a day and 31% would admit to being obsessed with the social network ... 62% feel a brand’s [Instagram] account is very important, with 45% agreeing that it has the power to change their perception [of the brand].”

How can educators use Instagram to connect with students? Join the conversation. Showcase your campus, your city, the view from your window, students in classes, your faculty in action, and your alumni’s achievements. Prospective students are looking for an idea of what life and study will be like if they choose your programme.

But don’t just broadcast on Instagram. The platform is all about sharing and showing appreciation for others’ perspectives and photos. That’s why reposting high-quality student photos related to your institution – with their permission, of course – can do as much for your brand as the original photos you are posting.

Monthly Instagram users in millions



INSTAGRAM USER BASE BY COUNTRY AS OF APRIL 2018. SOURCE: INSTAGRAM, STATISTA

The power of the repost

Mastering the art of the “repost” or “regram” – sharing a user’s picture once they’ve given you the green light – is essential to marketing (and is key to leveraging user-generated content).

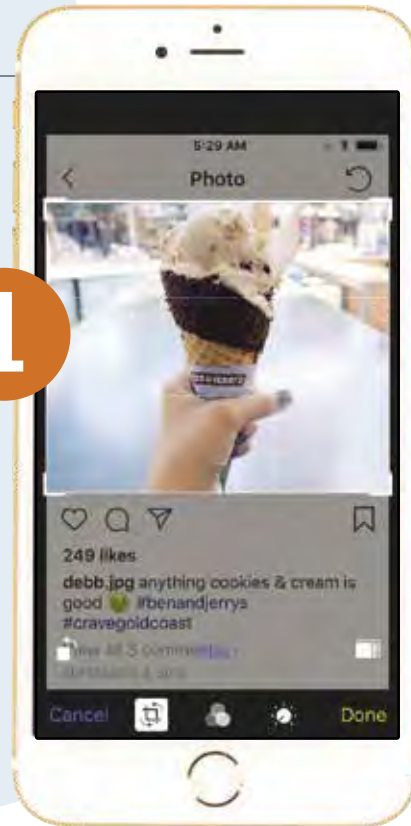
Reposting isn’t a feature included on Instagram. You need to either repost images manually or use a repost app (e.g., Repost for Instagram, InstaRepost, or Save & Repost for Instagram).



HOW TO REPOST ON INSTAGRAM

In Instagram, **find a great photo taken by a student (e.g., search by hashtag)**, then **ask the student for permission to repost** the photo by sending them a direct message in Instagram. **You can comment on the student's post first to get the conversation started.**

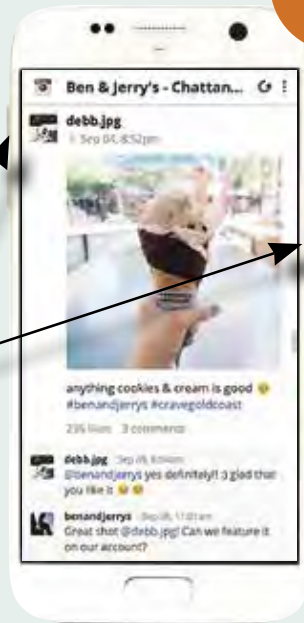
1



Take a screenshot.

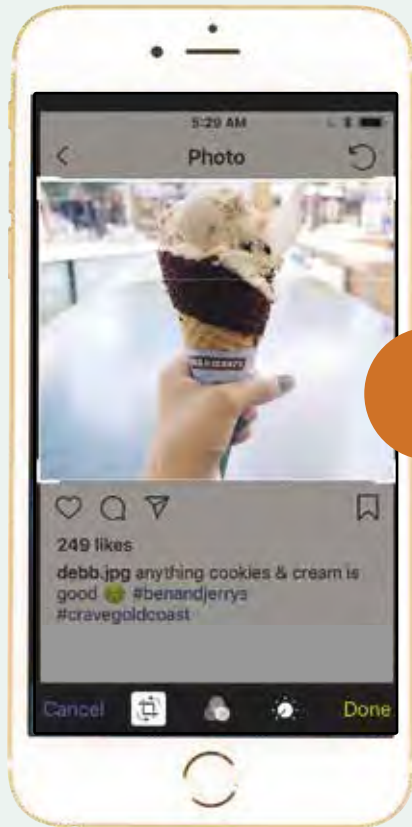
2

On Android, press and hold the volume-down and power buttons at the same time. You'll know you've captured the screenshot when you hear the phone take a snap.



On iOS devices, press the power/sleep button while you hold down the main home button for a few seconds.





Crop and adjust the screenshot so that only the photo shows, using either editing tools in the photo app or Instagram's editing tools.

Write a caption, credit the original user, and post it on your feed.





Best practices in reposting

DO

✓ Add hashtags in the repost caption. You're reposting in part to build your audience, and hashtags are one way new audiences can find you.

✓ Run an Instagram follower contest from time to time in which students take photos along a certain theme and post them with the hashtags you've promoted. You then repost them and select winners based on how well their images represent the spirit or subject matter you're looking for. Such contests are great for engaging and rewarding enthusiastic followers.

✓ Encourage students to take photos at fun school-related events (e.g., a soccer game, a charity drive, an amazing excursion), then repost the best of these. Prospective students are always

looking for "proof" that current students are having a good time while studying abroad; it helps them to imagine themselves doing the same.

DON'T

✗ Repost a photo without the user's express permission. Doing so is unethical and could damage your brand.

✗ Edit the image or add filters. The photo as created by the original poster must remain intact.

✗ Just tag the original user, credit them – they took the awesome shot and then gave you permission to use it to help your brand! Any of these are acceptable:
Photo: @username,
Credit: @username,
Captured by @username.



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2. Let them talk: Embracing the influence of student reviews

When planning a vacation, how do you choose where to go and where to stay? Chances are, you consult online reviews and recommendations posted by other travellers. Reviews likely influence your purchase decisions in other areas, too: a recent global KPMG survey found that online reviews are the most-searched-for source of information about products or services (55%), ahead of company websites (47%) and speaking with friends or family (22%).

International students – social media enthusiasts who spend hours of their time on the Internet – are highly influenced by online peer reviews of schools and destinations, especially when the destination is far away and they can't visit before enrolling. They are well aware that institutional websites tend to showcase only positive testimonials, and so they often turn to third-party school selection and review websites such as CourseFinders, Go Overseas, Student Hut, and Hotcourses Abroad. These websites post both positive and negative reviews about schools and universities.

Their existence, and their popularity, has profound implications for educators. Some of the most successful schools today encourage their students to post reviews on these third-party sites.

Take the bad with the good

The rise of online review culture has prompted a trend towards so-called “naked” or “transparent”

marketing, whereby savvy brands accept, embrace, and respond respectfully to what their customers say about them.

Adrienne Weissman, CMO at G2 Crowd, a peer-to-peer business review platform, says that the key to naked marketing is to “have a good product, deliver killer customer service, and showcase *all* of what your customers think of you.”

Ross Holmes, CEO of CourseFinders, agrees, noting that research shows that consumers trust the reviews attached to a brand more if there are both good and poor reviews. “It demonstrates that the company isn't hiding anything. If people see only positive reviews, they become suspicious, and many of them will search elsewhere on the Internet to look for other opinions.”



“In our experience, students care more about how complaints are dealt with than they do about the content of the complaint.”



The fear of students posting critical opinions can make schools and universities nervous about engaging in review culture, says Mr Holmes. But avoiding it is a mistake, he believes. "No one can make everyone happy all the time, and students know this," he says. "In our experience, students care more about how complaints are dealt with than they do about the content of the complaint. Replying to reviews is a great opportunity for schools to show that they listen, care, and that they're human."

"The thing to do – assuming you're running a good school, of course – is to encourage reviews by building this element into an existing system; for example, adding it as a component of the evaluation that students already fill out at the end of their studies."

The goal is to have a critical mass of student reviews posted on third-party sites. Research shows that the vast majority of consumers read up to ten reviews before they feel they can trust a business, which makes the case for encouraging as many reviews as possible about your school or university. Mr Holmes notes that satisfied students often pen lengthy reviews detailing what made their experience so great. Other students will write about both the best parts of their time at a school and the parts they weren't happy with, which is actually an excellent opportunity:

WHAT IS BRAND TRANSPARENCY?

Consumers consider a brand to be transparent when they believe it is ethical and honest about both positive and negative elements of its products, services, and operations. Furthermore, consumer trust in the brand grows if the brand acts quickly and meaningfully to address consumer feedback.

"That's when you can really engage in the conversation. Listen to students' feedback and respond promptly, because they expect an almost immediate response. Acknowledge their complaint and, if appropriate, outline what action you have taken or will take to address it. Negative comments in reviews help you spot areas of your business that need attention, and your reply helps differentiate you from your competition."

Authenticity matters

Both the quantity and the quality of reviews influence whether or not students trust what they're reading. For example, a school that has dozens of reviews looks more impressive than one with none. In terms of quality, the trustworthiness of a review has been shown to go up when it contains the following: linguistic fidelity (e.g., the way students really talk, so not overly formal), replies from other people and the brand itself, and the face of the reviewer.

Encouraging reviews is good marketing

Study after study shows that encouraging reviews, and not being afraid of the odd bad one, should now be an essential part of business strategy. Here are a few facts to prove the point:

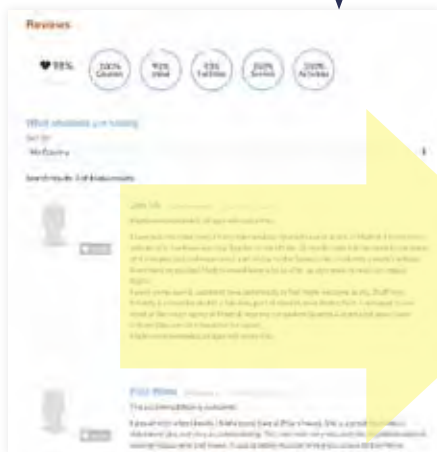
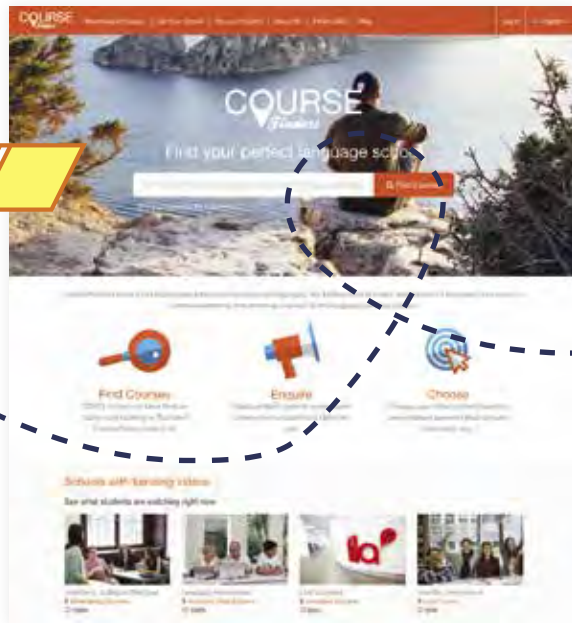
- 92% of consumers now read online reviews;
- 48% will visit a company's website after reading positive reviews;
- 95% suspect censorship or faked reviews if they don't see bad scores;
- 68% trust reviews more when they see both good and bad scores;
- 58% said they have recently begun leaving more and more online reviews based on customer service.

And finally...

Reviews produce an 18% uplift in sales, on average. The potential is amazing, so if you haven't already asked students to post reviews of their experience at your school or university, now is a great time to start.



The power of the peer review: students trust other students' opinions



Jim UK: *Reviewed on 11/01/2018*

Highly recommended, all ages will enjoy this

I have just returned from a 5 day intermediate Spanish course at AIL in Madrid. I loved every minute of it. I've been learning Spanish in the UK for 18 months and felt the need to put some of it into practice and experience a bit of day to day Spanish life. I had only a week's holiday from work so decided Madrid would have a lot to offer, as very easy to reach by regular flights.

I went on my own & could not have been made to feel more welcome at AIL. Staff very friendly & school located in a fabulous part of Madrid, near Retiro Park. I managed to see most of the major sights of Madrid, improve my spoken Spanish & learn a bit about local culture (discovered a fondness for tapas).

Highly recommended, all ages will enjoy this.

evgs



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(UNESCO World Rank 2014)

HOSTS

3 of World's TOP 100 Universities

(Times Higher Education World Rankings 2015)



Named best for openness in international higher education

(study by British Council 2016)



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(Global Peace Index 2015)



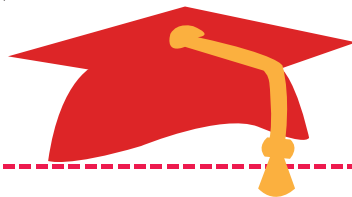
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(QS Worldwide Rankings 2015 - 2016)



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(According to Mercer Quality of Living Ranking 2016)



TOP 1%



Of Globally Cited Researchers and Listed in the World's Most Influential Minds

(Thomson Reuters 2014)

TOP 50

Universities in Popular Subject Areas

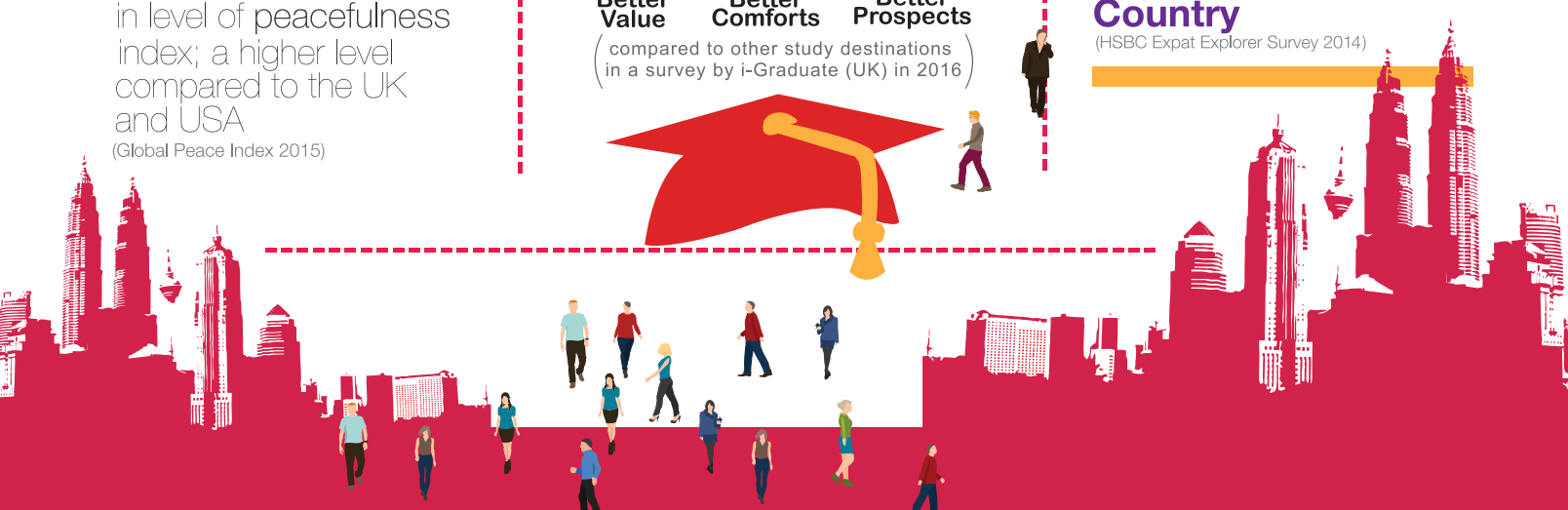


ranked by academic reputation, employer reputation and research impact

(QS Worldwide University Rankings 2015)

12th World's FRIENDLIEST Country

(HSBC Expat Explorer Survey 2014)



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_st_dy

All that's missing is U.





COMING UP IN 2019

JANUARY

ENGLISH USA PROFESSIONAL DEVELOPMENT CONFERENCE
17-18 January
San Francisco, CA, USA

ST ALPHE SPAIN
18-20 January
Málaga, Spain

ASSOCIATION OF INTERNATIONAL EDUCATION ADMINISTRATORS (AIEA) ANNUAL CONFERENCE
20-23 January
San Francisco, CA, USA

BETT SHOW
23-26 January
London, UK

CASE-NAIS INDEPENDENT SCHOOLS CONFERENCE
27-29 January
Philadelphia, PA, USA

FEBRUARY

ENGLISH UK MARKETING CONFERENCE
8 February
London, UK

ICEF DUBAI WORKSHOP
11-13 February
Dubai, UAE

ST ALPHE ASIA
20-22 February
Bangkok, Thailand

ST ALPHE TAIWAN
24-26 February
Taipei, Taiwan

LANGUAGES CANADA ANNUAL CONFERENCE
24-27 February
Winnipeg, MB, Canada

ICEF JAPAN-KOREA AGENT ROADSHOW
25-27 February
Tokyo, Japan, and Seoul, South Korea

EURASIA HIGHER EDUCATION SUMMIT
27 February-1 March
Istanbul, Turkey

MARCH

ICEF MEXICO-COLOMBIA AGENT ROADSHOW
4-8 March
Mexico City, Mexico, and Bogotá, Colombia

BRITISH BOARDING SCHOOLS WORKSHOP
7-9 March
Hayes, UK

ST ALPHE BRAZIL
13-15 March
São Paulo, Brazil

FEDERATION OF ENGLISH LANGUAGE TEACHING ORGANISATIONS MALTA (FELTOM) WORKSHOP
18-24 March
Malta

ICEF UKRAINE FOCUS
19-20 March
Kiev, Ukraine

ICEF MOSCOW WORKSHOP
23-25 March
Moscow, Russia

ASIA-PACIFIC ASSOCIATION FOR INTERNATIONAL EDUCATION (APAIE) ANNUAL CONFERENCE
25-29 March
Kuala Lumpur, Malaysia

ICEF CENTRAL ASIA FOCUS
28-29 March
Almaty, Kazakhstan

INTERNATIONAL ASSOCIATION OF LANGUAGE CENTRES (IALC) WORKSHOP
28-31 March
Seville, Spain

APRIL

ICEF AUSTRALIA NEW ZEALAND AGENT (ANZA) WORKSHOP
3-5 April
Darwin, Australia

ST ALPHE ISTANBUL
5-7 April
Istanbul, Turkey

CASE ASIA-PACIFIC ADVANCEMENT CONFERENCE (APAC)
8-11 April
Brisbane, Australia

EUROPEAN ASSOCIATION FOR QUALITY LANGUAGE SERVICES (EAQLS) INTERNATIONAL CONFERENCE
11-13 April
Madrid, Spain

ICEF NORTH AMERICA WORKSHOP – VANCOUVER
24-26 April
Vancouver, BC, Canada

CANADIAN ASSOCIATION OF PUBLIC SCHOOLS – INTERNATIONAL (CAPS-I) CONFERENCE & ANNUAL GENERAL MEETING
28 April-1 May
Winnipeg, MB, Canada

MAY

BRITISH COUNCIL'S GOING GLOBAL
13-15 May
Berlin, Germany

ICEF AFRICA WORKSHOP
15-17 May
Cape Town, South Africa

ENGLISH UK ANNUAL CONFERENCE & ANNUAL GENERAL MEETING
23 May
London, UK

ASSOCIATION OF INTERNATIONAL EDUCATORS (NAFSA) ANNUAL CONFERENCE & EXPO
26-31 May
Washington, DC, USA

BRITISH EDUCATIONAL TRAVEL ASSOCIATION (BETA) YOUTH TRAVEL WORKSHOP
2019 dates TBA
London, UK

JUNE

ICEF SOUTHEAST ASIA WORKSHOP
19-21 June
Ho Chi Minh City, Vietnam

BRITISH COLUMBIA COUNCIL FOR INTERNATIONAL EDUCATION (BCCIE) SUMMER SEMINAR
23-26 June
Whistler, BC, Canada

JULY

UK COUNCIL FOR INTERNATIONAL STUDENT AFFAIRS (UKCISA) ANNUAL CONFERENCE
3-5 July
Keele, UK

INTERNATIONAL ASSOCIATION FOR COLLEGE ADMISSION COUNSELING (IACAC) ANNUAL CONFERENCE
9-12 July
London, ON, Canada

AUGUST

AUSTRALIAN COUNCIL FOR PRIVATE EDUCATION & TRAINING (ACPET) NATIONAL CONFERENCE AND ASIA PACIFIC INTERNATIONAL EDUCATION FORUM (APIEF)
2019 dates & location TBA

SEPTEMBER

ENGLISH UK'S STUDYWORLD
2-4 September
London, UK

EUROPEAN ASSOCIATION FOR INTERNATIONAL EDUCATION (EAIE) ANNUAL CONFERENCE
24-27 September
Helsinki, Finland

NATIONAL ASSOCIATION FOR COLLEGE ADMISSION COUNSELING (NACAC) ANNUAL CONFERENCE
26-28 September
Louisville, KY, USA

ICEF HIGHER EDUCATION WORKSHOP
2019 dates TBA
Helsinki, Finland

WORLD YOUTH & STUDENT TRAVEL CONFERENCE (WYSTC)
2019 dates & location TBA

ICEF LATIN AMERICA WORKSHOP
2019 dates TBA
São Paulo, Brazil

ENGLISH AUSTRALIA CONFERENCE
2019 dates & location TBA

VAMOS! ESPAÑOL EN ESPAÑA FEDELE WORKSHOP
2019 dates & location TBA

OCTOBER

AUSTRALIAN INTERNATIONAL EDUCATION CONFERENCE (AIEC)
15-18 October
Perth, Australia

ICEF BEIJING WORKSHOP
2019 dates TBA
Beijing, China

ENGLISH USA INTENSIVE ENGLISH PROGRAMS (IEP) STAKEHOLDERS CONFERENCE
2019 dates & location TBA

NOVEMBER

ICEF BERLIN WORKSHOP
3-5 November
Berlin, Germany

CANADIAN BUREAU FOR INTERNATIONAL EDUCATION (CBIE-BCEI) ANNUAL CONFERENCE
17-20 November
Winnipeg, MB, Canada

DECEMBER

ICEF MIAMI WORKSHOP
9-11 December
Miami, FL, USA

AMERICAN INTERNATIONAL RECRUITMENT COUNCIL (AIRC) ANNUAL CONFERENCE
2019 dates & location TBA

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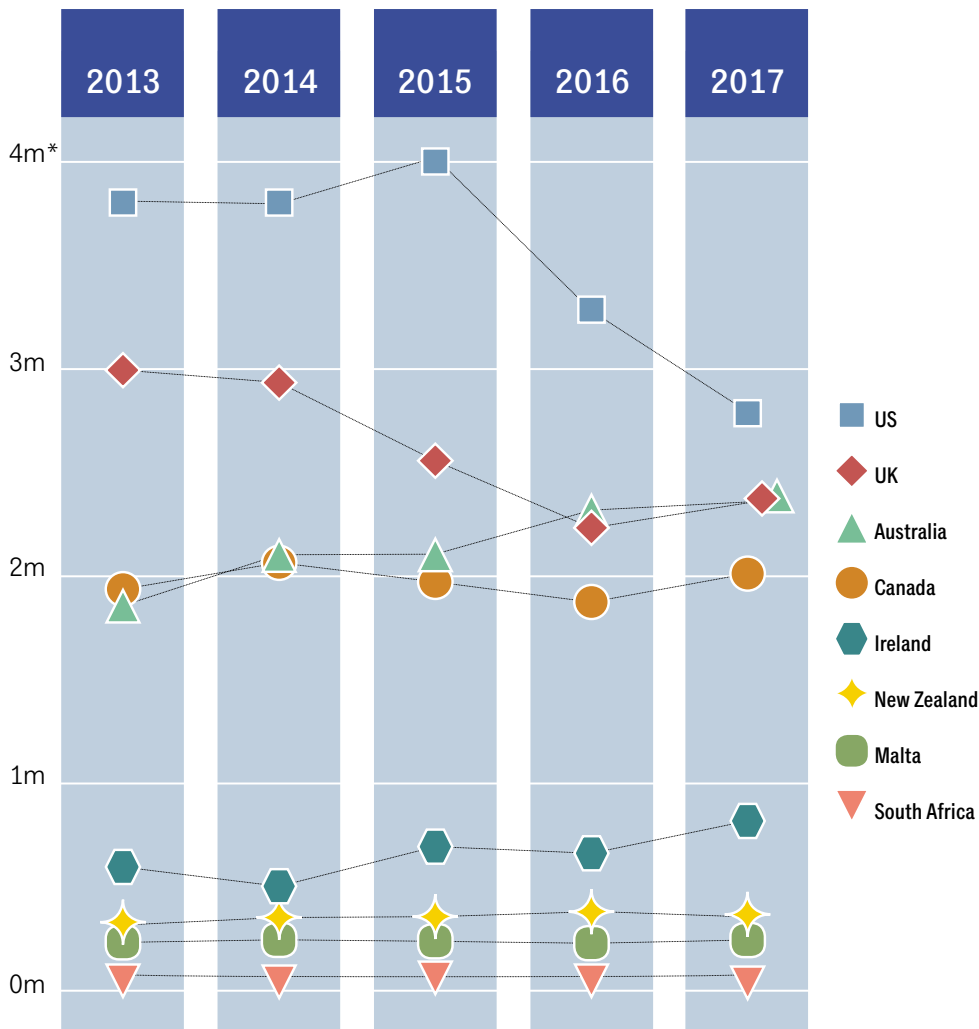


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WISHLIST

Which ELT destinations are gaining (or losing) market share?



TOTAL STUDENT WEEKS IN MAJOR ELT DESTINATIONS

2013	2014	2015	2016	2017
11,887,031	12,094,260	12,021,641	11,105,819	11,058,644

The total volume of student weeks reported for eight major English-language training (ELT) destinations has decreased by 7% over five years, falling from roughly 11.9 million weeks in 2013 to just over 11 million weeks in 2017. Over the five-year time span, notable shifts have occurred in the market share each destination holds. Given that the global market for ELT has declined slightly since 2013, a particular country's growth or contraction affects the market share of competing destinations.

The figures shown here are based on estimates of ELT student weeks for each destination prepared by StudentMarketing, a Vienna-based global market intelligence consultancy. These figures have been used with permission, and they represent extrapolations based on multiple sources, including StudentMarketing's own internal sources. The StudentMarketing estimates cover all language centres in the destination countries and represent the best possible calculation of student weeks booked rather than a headcount of ELT enrolments.

SOURCES: STUDENTMARKETING, EDUCATION SOUTH AFRICA, ENGLISH AUSTRALIA, ENGLISH UK, INSTITUTE OF INTERNATIONAL EDUCATION, LANGUAGES CANADA, MARKETING ENGLISH IN IRELAND, MINISTRY OF EDUCATION NEW ZEALAND, NATIONAL STATISTICS OFFICE MALTA.

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