

# ICEF INSIGHTS

Intra-regional mobility in Asia

Top destinations and  
sending markets

Degree plus: Credential  
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NEW MARKETS AND STRATEGIES FOR 2020



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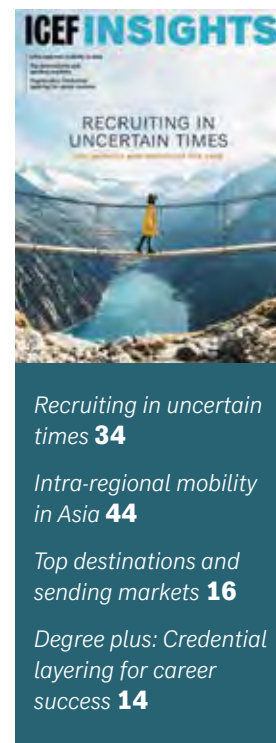
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# WELCOME

**I**t seems like only yesterday that we published the first issue of *ICEF Insights*, but in fact this is the fifth year of the magazine – and quite a lot has changed in that time and in our industry. Welcome to this year's edition!

This issue is devoted to exploring how economic, demographic, technological, and political events are profoundly affecting the international education landscape. The traditionally narrow band of preferred destinations has expanded, and Asian countries as well as English-speaking alternatives to the US and UK are quickly gaining market share. Africa, where one of every four people aged 15–24 will live as early as 2030, is becoming the next hotspot for recruitment.

Career outcomes are much on students' minds as they consider which programmes and institutions to apply to; education is now expected to deliver job-ready skills. Degrees are still in demand, but so are more specialised credentials delivered by colleges and technical institutes. In many regions, acquiring a second (or third) language makes the difference in the quest for a good job.

Artificial intelligence systems are now operating in the international education space, and this spells both opportunity and challenge, even as it remains to be seen how they will change the industry.

Finally, reaching students remains – as always – a moving target. We look closely at their growing preference for video over text and explore the art of emotional branding and how you can use it across your business touchpoints.

As ever, it's a brand-new world, and I hope that with every page of this magazine, you develop excellent ideas to thrive in it.

With best wishes,

Markus Badde  
Chief Executive Officer





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# NEW & NOW

Job-focused study plans, top 9 destinations, groundbreakers, and artificial intelligence

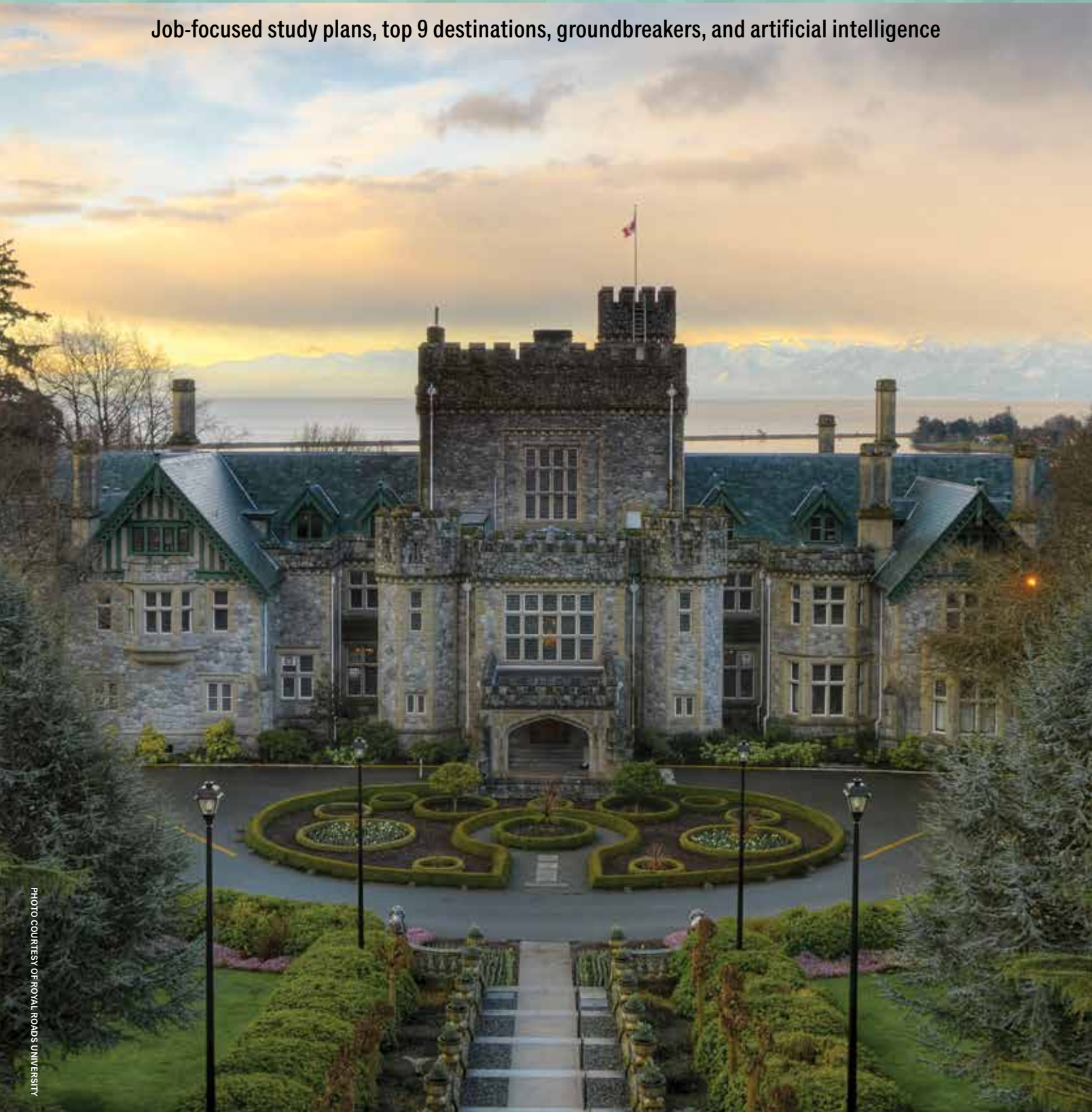


PHOTO COURTESY OF ROYAL ROADS UNIVERSITY

The iconic Hatley Castle at Royal Roads University near Victoria, Canada. International enrolment at Royal Roads grew by 63% between 2014 and 2018, a trend consistent with Canada's position as the world's fastest-growing study destination. See page 16 for more.



# IN CONTEXT: DEGREE PLUS

A growing trend of students layering credentials to better compete for jobs spells change and opportunity for educators



As we speak, young job candidates on every continent are presenting their university degrees during interviews for coveted jobs. A degree will naturally give them an edge over candidates with no post-secondary education. Increasingly, however, it may not be enough to secure the position.

For the first time ever, the number of adults aged 25–34 in

OECD countries who have a post-secondary degree outstrips the number who do not. The growing proportion of degree-holders, combined with high unemployment rates and skills shortages in many countries, has ushered in a new reality: we'll call it "degree plus."

"Degree plus" summarises a growing trend of students pursuing





at least one other qualification after completing their first degree to better compete in their chosen field.

#### MOVEMENT ACROSS SECTORS

As students layer bachelor's degrees with vocational certificates, more advanced degrees, micro-credentials, language courses, and internships, the sectoral silos of universities, colleges, and specialised institutes are breaking down, and new players are entering the education space. Examples include universities partnering with MOOC providers; pathway programmes allowing students to undertake part of their degree at less cost in their home country; and now, in China, the government-initiated "1+X" pilot that graduates students with both a degree and a vocational diploma.

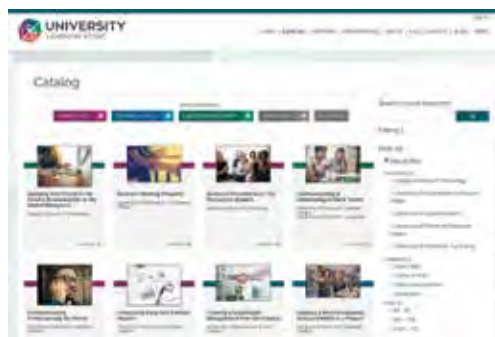
There are even "stores" (e.g., the University Learning Store developed and awarded by universities including UCLA and Georgia Tech) where students can buy micro-credential courses, a development showing strong similarities with the retail trade.

#### NEW OPPORTUNITIES

All this means that the traditional boundaries and hierarchies of education and credentials are

becoming less distinct. As a result, universities are casting fresh eyes on operational models, programming, industry partnerships, and collaboration with colleges, pathway programme providers, language institutes, and universities in other countries. And vocational colleges and language institutes are seeing a greater and more diverse pool of prospects, as demand for non-degree credentials increases.

The new normal in higher education – as in so many other industries – is one of disruption. This is the only trend we can truly count on going forward.



Micro-credential courses at the University Learning Store, developed and awarded by universities including UCLA and Georgia Tech.

#### Did You Know?

Across OECD and G20 countries, the number of young adults with degrees is forecast to reach 300 million by 2030, up from 137 million in 2013.

#### What's a "Plus"?

Examples of extra qualifications include:

- Short micro-credentials delivering specific skills;
- MOOCs and online courses of varying lengths and price points;
- Vocational certificates;
- Niche post-graduate degrees or diplomas;
- Internships and work placements;
- Language courses, particularly in developing countries where having a degree is often not sufficient to get a job.

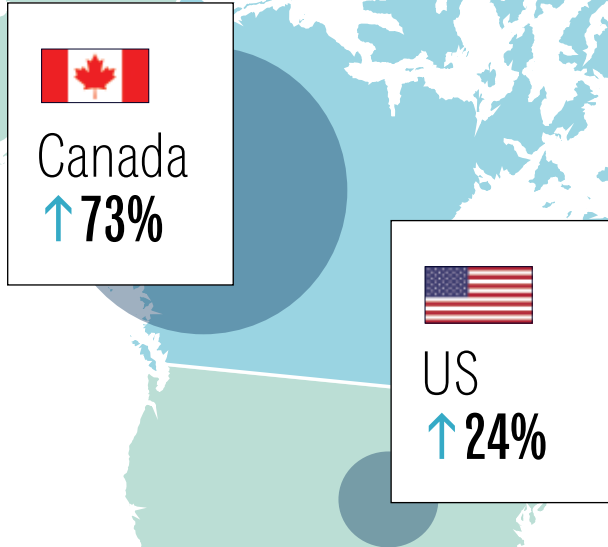
For students in emerging economies, obtaining these extra qualifications from a foreign institution can be the edge they need in a tight job market.



# GROWTH TRENDS: THE PAST FIVE YEARS

The world's top study destinations all saw their foreign enrolments grow between 2014 and 2018, but some grew more quickly than others.

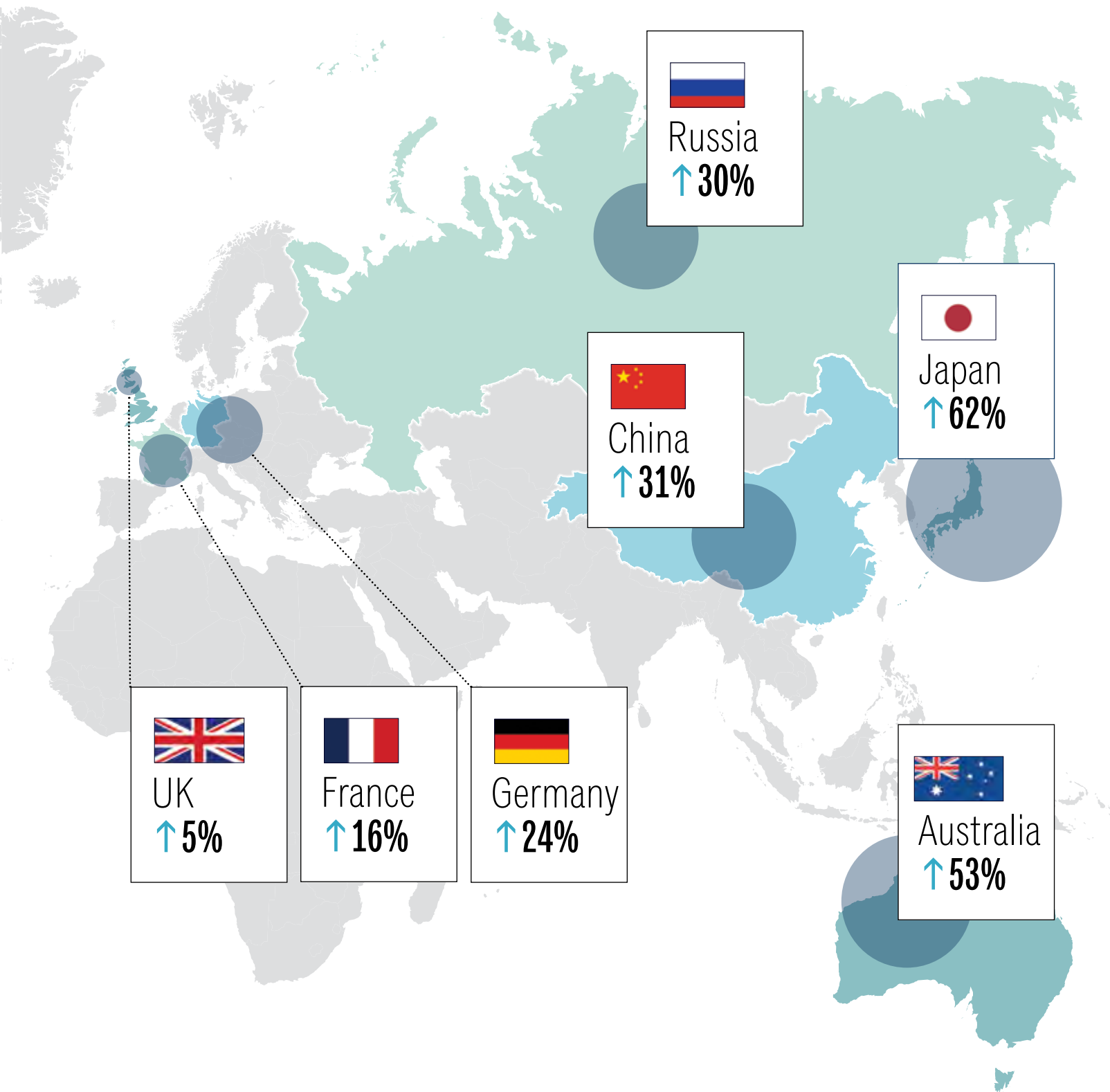
The US still enrolls the most international students, but its market share is slipping as other countries have become more competitive. Australia, Canada, and China are particularly notable for the number of students they've added in the past five years, as the more detailed breakdowns on the following pages will show.



## 2018 student enrolment numbers

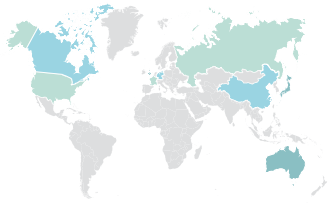
1	US	1,094,790
2	Australia	693,750
3	UK	586,909*
4	Canada	572,415
5	China	492,185
6	Germany	374,585
7	France	343,000
8	Russia	313,090
9	Japan	298,980

\*The total noted here reflects HESA data, English UK's reported volume of student weeks for 2018 (which has been converted to a full-time equivalent value to allow us to present a consolidated total), ISC student numbers for K-12, and AOC's partial survey value for foreign enrolment in British VET (2016/17).





**GROWTH TRENDS: THE PAST FIVE YEARS (cont'd): Foreign student increases in – and top sending markets for – Australia, Canada, China, Germany, the UK, and the US.**



## United States

**208,740**  
students added  
since 2014

↑ 24%

Sources: IIE and US Immigration and Customs Enforcement SEVIS



### Top contributors to growth

India	93,600
China	88,900
Vietnam	7,745
Nepal	5,115
Nigeria	4,770

2014 total	2018 total
<b>886,050</b>	<b>1,094,790</b>

## Australia

**240,800**  
students added  
since 2014

↑ 53%

Source: Department of Education and Training, Government of Australia



### Top contributors to growth

China	82,470
India	39,425
Nepal	27,910
Brazil	17,370
Colombia	9,695
Malaysia	7,565
Sri Lanka	5,055

2014 total	2018 total
<b>452,950</b>	<b>693,750</b>

## Canada

**242,245**  
students  
added  
since 2014

↑ 73%

Source: Immigration, Refugees and Citizenship Canada



### Top contributors to growth

India	134,165
China	35,170
Vietnam	15,610
Iran	6,265
Brazil	4,980

2014 total	2018 total
<b>330,170</b>	<b>572,415</b>



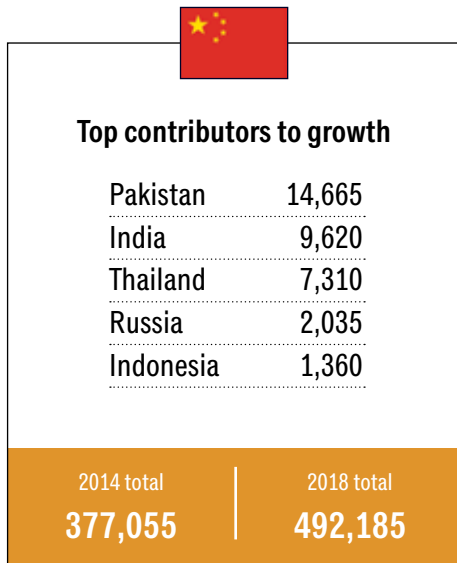
## China

**115,130**

students added since 2014

↑ 31%

Source: Ministry of Education of the People's Republic of China



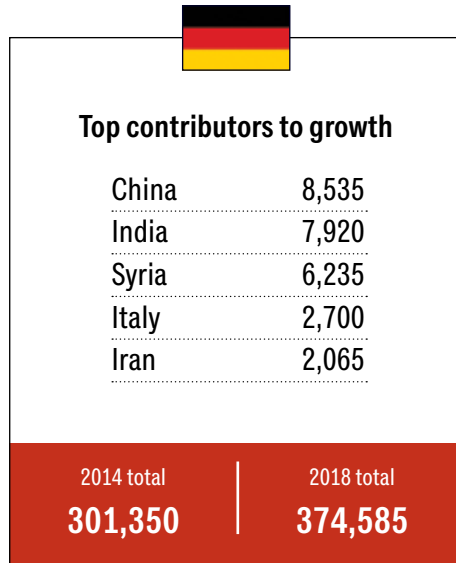
## Germany

**73,235**

students added since 2014

↑ 24%

Source: DAAD German Academic Exchange Service



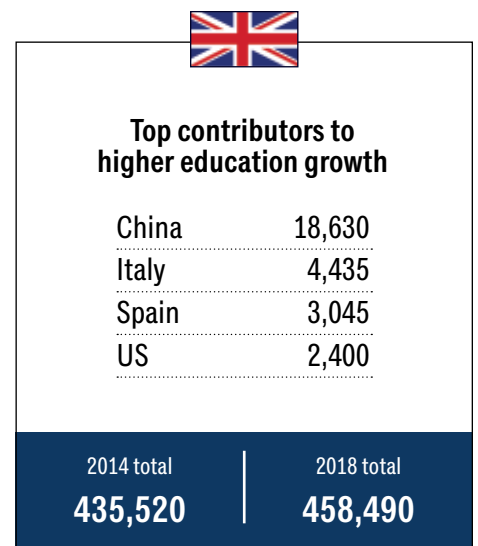
## United Kingdom

**22,970**

university students added since 2014

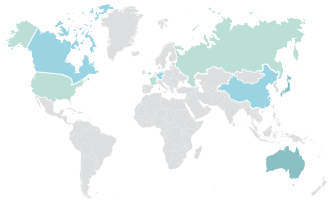
↑ 5%

Source: HESA





**GROWTH TRENDS: THE PAST FIVE YEARS (cont'd): Foreign student increases in – and top sending markets for – France, Japan, and Russia.**



## Japan

**114,825**  
students added  
since 2014

↑ 62%

Source: Japan Student Services Organization



### Top contributors to growth

Vietnam	61,180
China	37,160
Nepal	19,040
Taiwan	4,550

2014 total	2018 total
<b>184,155</b>	<b>298,980</b>

## France

**47,915**  
students added  
since 2014

↑ 16%

Source: Campus France



### Top contributors to growth

Algeria	8,585
Morocco	5,955
Italy	4,020
Brazil	3,875
Cote d'Ivoire	3,035

2014 total	2018 total
<b>295,085</b>	<b>343,000</b>

## Russia

**71,705**  
students added  
since 2014

↑ 30%

Sources: Russian Presidential Academy of National Economy and Public Administration (RANEPA) and IIE



### Top contributors to growth

China	6,920
Uzbekistan	6,100
Tajikistan	4,780
Turkmenistan	2,980
India	3,985

2014 total	2018 total
<b>241,380</b>	<b>313,090</b>

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# FIVE GROUNDBREAKERS

The world always needs its pioneers, the people and groups who realise and act on the potential of change. Check out these governments, universities, architects, and students shaking things up in all the right ways.

## 1 EXPERIENCE + EDUCATION

Today's employers look for graduates who can prove they're able to work successfully on projects relevant to an industry. Northeastern University's Experiential Network (XN) is a key component of the university's programmes for lifelong learners, and through it, 10,000 students and counting have completed projects for 2,000 companies, including Pfizer, General Electric, Raytheon, and Costco.

A recent Northeastern University survey of 750 US hiring leaders found that employers' top priority for colleges and universities was "to include real-world projects and engagements with employers and the world of work."



## 2 EVERY CREDIT COUNTS

New Zealand has become one of the first countries to recognise micro-credentials in its qualifications framework (NZQF). These mini-degrees (or digital badges or certificates) take far less time to obtain than traditional degrees and are usually highly specific to a topic or industry area. They are now equivalent to between five and 40 credit points on the NZQF. Their inclusion is intended to give employers confidence to accept graduates' micro-credentials and understand their value. MOOC providers and corporations can also receive equivalence statements for their skills and training programmes. "Over time, there will be more demand for shorter, sharper units of learning as people change careers and stay in the workforce longer." —Grant Klinkum, NZQA





Utrecht University student housing.

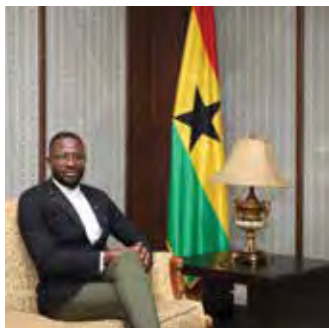
### 3 CREATIVE CONTAINERS

At Utrecht University, student housing was stretched to the max until Mart de Jong and Architectenbureau De Vijf designed a stunning new complex built from shipping containers. The trend isn't limited to the Netherlands: shipping containers also provide housing for students in Israel, France, Scotland, South Africa, the US, and other countries.

"Large numbers of shipping containers are manufactured each year, transported to far-flung ports, and frequently discarded. These unwanted shells can be purchased relatively cheaply and given a new lease on life."

—Adam Williams, *New Atlas*

Harvard University student Mac Sarbah is passionate about fostering entrepreneurship in Ghana.



### 4 GIVING BACK

MacLean "Mac" Sarbah, a Ghanaian student enrolled in Harvard University's Graduate School of Design, keeps Ghana top of mind while studying. He's raised funds for an Internet facility for students in his home city of Mepe and has run a free advisory service helping students from Ghana and other countries apply to foreign universities. To do his part in finding solutions for high youth unemployment in Ghana, Mr Sarbah is working on a programme he calls "Ghana's Global Youth Entrepreneurship Fellowship," aimed at educating and training college-aged Ghanaian students to start their own businesses.

"For me, it's just an accumulation of a lot of things I've done. I want to help young people in Ghana by giving them the tools to see social problems as entrepreneurial opportunities."

—Mac Sarbah



Designers Thao Dao and Anna Phan model their company's clothes and accessories.

### 5 STYLE STATEMENT

"Made in Vietnam" are three words that

Westerners often see on the tags of affordable clothing made too often by poorly paid Vietnamese. But 27-year-old Thao Dao, who attended the Fashion Institute of Design & Manufacturing in Los Angeles, and Anna Phan, who attended Santa Clara University in California, have a mission: turn "Made in Vietnam" into a fashion statement.

Ms Dao and Ms Phan returned to Vietnam after their studies in the US and together founded clothing and accessory company LaDan. Their company (@LaDanvn on Facebook) now has tens of thousands of social media followers drawn to Ms Dao and Ms Phan's elegant designs.

"For our generation, it's time ... You can come back and make a difference." —Thao Dao, co-founder of LaDan



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## THE FIRST CANADIAN COLLEGE IN CHINA

Building on Centennial College's 20-year history in China, Suzhou Centennial College (SCC) was established in 2016 as the first nationally approved Canadian college to operate in China. The college has the approval of both the Chinese Ministry of Education and the Jiangsu Provincial Government, and it is the only college delivering Canadian credentials in China.

Suzhou Centennial College marks a bold step for Toronto-based Centennial in terms of its international strategy at the same time as it allows the college to continue its long tradition of preparing students for career opportunities. "The Suzhou programmes are linked to industry and government," says Centennial's Associate Vice President of International Education, Virginia Macchiavello. "We are applying the Ontario college model known for the partnership table that engages with employers to ensure students get the skills they need to succeed."

With a full-time enrolment of more than 2,600 students in fall 2019, SCC attracts a diverse enrolment. Students come not only from China, but also from a number of other countries including South Korea, Panama, India, Côte

d'Ivoire, Uzbekistan, and Sweden. "You can talk with many people from around the world, and meet a lot of international students. That's why I chose this school," says Belle Xinbei, a software student and one of more than 50 "Chinese Buddy" peer mentors for foreign students at SCC.

In keeping with Centennial's strong links around the world, the college in Suzhou has opened up new multilateral partnerships, notably with government ministries in



**"If I know Mandarin, when I go back to Panama I will have a really good job."**

—Manuel Guerra, SCC student,  
sponsored by The Institute for Training and  
Development of Human Resources, Panama.

Panama and South Korea that have respectively established scholarship and exchange programmes for their students in Suzhou.

SCC also represents a stepping stone for students to continue their studies in Canada. Centennial College offers more than 1,000 education pathway options through institutional partnerships. Students from Suzhou can build on their academic and cultural experience in China by following articulated

academic pathways to advanced studies at Canadian colleges and universities. Canadian students can now also go to Suzhou to complete part of their Centennial programmes in China. "We see the college in Suzhou as an opportunity for students to learn how business is done in the East," adds Ms. Macchiavello.

In all of these respects, Suzhou Centennial College is a fascinating reflection of the growing complexity in international education today.

At a time when China strengthens its role as one of the world's top host countries, and China's "One Belt, One Road" initiative connects to markets in Asia, Europe, South America, and Africa, a Canadian college in Suzhou is a way to adapt to the changing study abroad markets. It is also a way to further diversify Centennial's enrolment base in Toronto while opening the door to new partnerships in China and elsewhere.



# LEARNING MACHINES

New artificial intelligence systems aim to transform how students find and select institutions, refine institutional recruiting, and expand international networks and partnerships for agents and counsellors

## WHAT IS AI?

Artificial intelligence, commonly referred to by its acronym, AI, is an area of computer science that simulates human intelligence, particularly with respect to learning, reasoning, and language processing. Think IBM's Deep Blue computer, which famously won a match against a world chess champion, and Apple's virtual assistant, Siri.

## HOW IS AI BEING USED IN INTERNATIONAL EDUCATION?

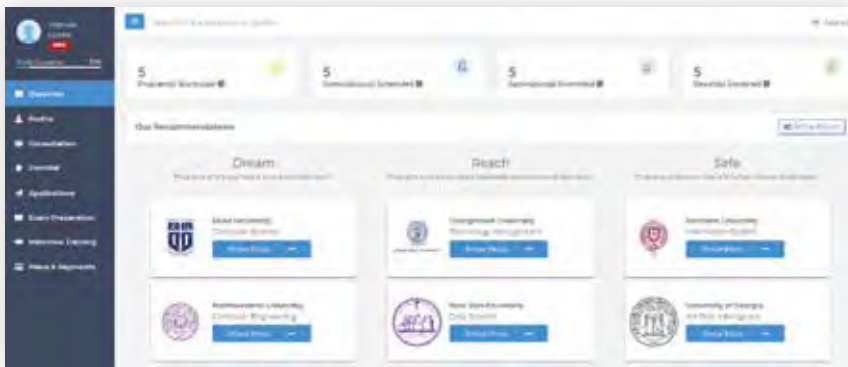
New AI platforms, such as ApplyBoard, SchoolApply, INTCAS, and iSchoolConnect, are amassing large amounts of data from students and schools, data that is then used to match students with best-fit institutions abroad. The promise here is that as it accumulates more and more data, the AI system can learn over time to efficiently select the best possible options for students.

AI is also being used to assist students in the admissions process by smoothing the filing of applications and by providing advance feedback to applicants on admissions essays or interviews.

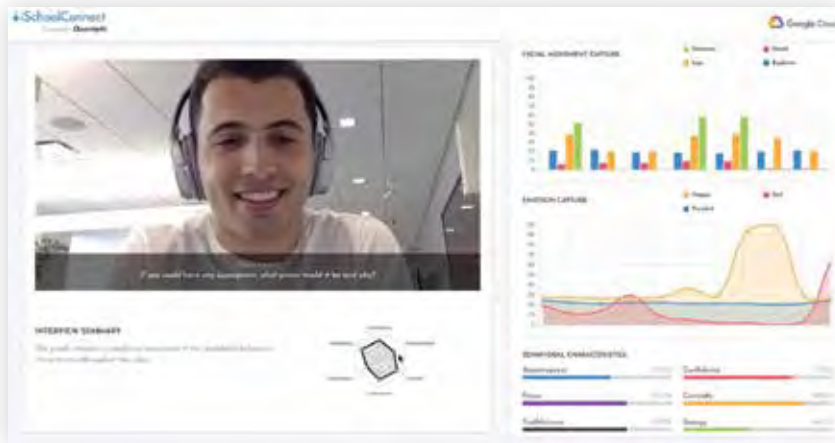


## IN A NUTSHELL:

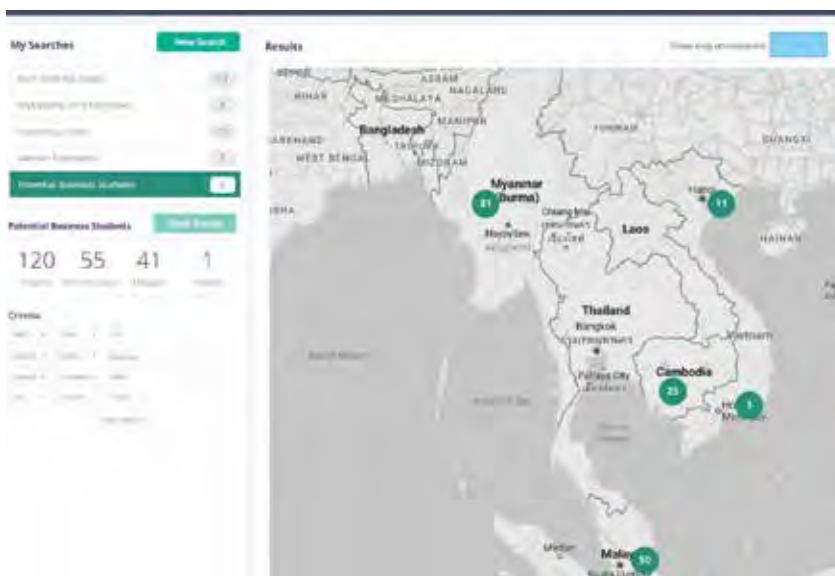
- For students, the goal when using an AI platform is to find their way to the right institution;
- For educators, AI platforms offer both new opportunities to target prospective students and a meeting ground for universities and schools;
- For agents and counsellors, these new systems provide a natural extension of established partner networks abroad.



iSchoolConnect's matching algorithm generates a series of options – ranging from “safe” (high chance of admission) to “dream” (long shot at admission) – based on the student's profile.



AI can be used, as in this example from iSchoolConnect, to evaluate an applicant's interview performance through machine analysis of a practice video.



As in this example from Concourse – an AI-enabled system designed for counsellors at international high schools – universities can use the platform to target applicants in specific markets and fields of study.



**WHAT IS THE OUTLOOK?**

AI platforms will have to overcome two important challenges if they are to establish a lasting footprint in international education:

1. The need to amass large amounts of data. In part because of privacy concerns, many platforms do not have access to the volume of data the system needs to continue to learn to do optimal student-institution matching. This situation will improve over time as more and more data is accumulated, but it is currently an issue for most systems.
2. The need to offer personal support to prospective students making one of the biggest decisions and investments of their lives. Knowing this, some AI platforms are now also building in-house counselling teams to complement their technology-driven services.



Will AI truly revolutionise study abroad, or might it simply become an additional tool that students, institutions, and agents use to find each other and work together? The potential of machine learning is certainly compelling, but, as always, the real impact that any new technology will have can only be seen over time.



An agent's view of the INTCAS system reveals how applicant data can be reviewed and managed on the platform.

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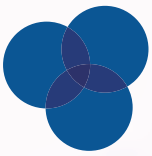


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## STAFF INSIGHTS:

How can institutions distinguish themselves and stand out with agents?

Professional, local advising is increasingly seen as a must-have service for students planning to study abroad. In many countries, it is common practice for prospective students to use an education agent. In some countries, education agencies assist 60–80% of international students.



ICEF Director, Americas, Ian Cann at the 2019 NAFSA Conference in Washington, DC.

“Throughout my 10 years with ICEF, I have observed countless educator-agent success stories. A strong lesson that I have learned is about the power of relationships to drive business, and that it is more often the personal relationships that drive student movement. Simply put, agents send students to people they like and to people they trust.

Remember that preliminary agent meetings are not training opportunities: Training can always be done later, once a relationship has been established. For the initial meeting, keep the focus on creating a good first impression, and you’ll be awarded the opportunity to offer training later on. If the meeting goes well, don’t forget to agree on a date for your next conversation.

You can also stand out through better service and quicker communication and by treating your agents as partners. Consult them and keep them informed. Support them with their marketing endeavours when they align with yours. They are your local experts, and the more you treat them as such, the more you will be rewarded.” –Ian Cann



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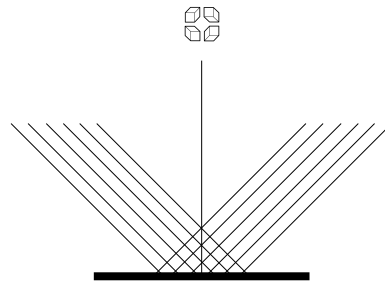
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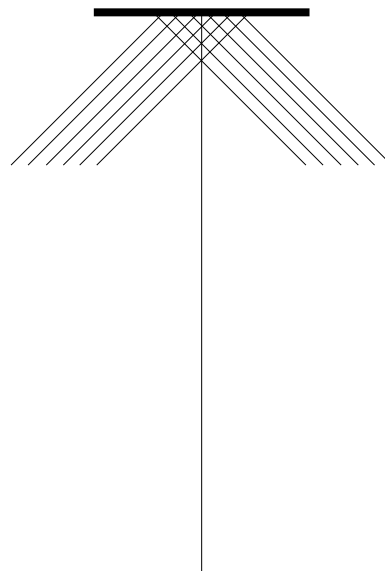
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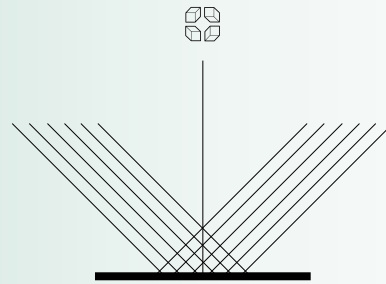


# THE OPPORTUNITY OF CHANGE



Across the world, **the winds of change are strengthening**. Prevailing economic, political, and demographic trends are quickly reshaping the present and future of countries and redefining the landscape of international education. 🧠 Important **new sending markets are emerging**, even as more destinations – notably a number of regional education hubs – are capturing the attention of students. **Technological advances**, including sophisticated artificial intelligence (AI) applications, create both challenges and opportunities for recruiters. And as automated systems and smart machines move from the realm of the imagination into our everyday lives and workplaces, students are more focused on **career-oriented education** than ever. 🧠 In the **special feature package that follows, you will find strategies** for welcoming students from emerging markets as well as a focus on key growth markets in Africa. We look closely at intra-regional mobility, a crucial dimension of competition in international student recruitment today. 🧠 For all in the industry, the stakes are high. **The question now is not whether to change, but how.**





**Selecting new markets  
and welcoming  
students from them**

# NEW HORIZONS, WARM WELCOMES

Little touches go a long way  
when it comes to making a campus feel  
inviting and friendly



The past year has witnessed a shift from “diversification” being a buzzword to being a term with real urgency attached to it for universities and colleges in major destinations. For several years, Chinese, Indian, and in some cases Saudi enrolments have grown constantly, quickly, and profitably for many institutions. Massive student flows from these countries have been the norm for so long that they have seemed almost a permanent feature of the international education landscape.

As we’re all very aware these days, however, the geopolitical environment is volatile, and demand factors for study abroad are changing by the minute. As we speak, China is in a trade war with the US and the US is restricting some Chinese student visas. Saudi Arabia has banned its remaining scholarship students from studying in Canada in reaction to Canada’s criticism of Saudi human rights policies. Meanwhile, the massive Saudi scholarship programme that sent so many students abroad is no more. The key market of India shifted away from the UK in recent years due to reduced post-study work rights for foreign students from 2012 to 2019; two-year work visas were restored in September, 2019.

Suddenly, the idea of adding a greater diversity of students to campuses feels like a serious priority. And we are beginning to see this priority yielding a greater mix of nationalities on campuses in major destinations. For example, in 2018:

- The fastest-growing markets for **Canada** included Bangladesh, Iran, Vietnam, Colombia, the Philippines, Kenya, and Brazil;
- In the **US**, significant growth came from Brazil, Nepal, Pakistan, Nigeria, and Vietnam;
- **British** universities welcomed more Malaysian, Nigerian, and Thai students;
- In **Australia**, Nepal, Colombia, and Brazil contributed many more students;
- **Japanese** universities saw substantial growth from Vietnam, Nepal, Sri Lanka, Indonesia, and Myanmar;
- In **South Korea**, the number of Vietnamese students nearly doubled in one year.





## How to select markets

The idea of diversifying a student population can seem overwhelming, but it becomes less so when you realise you don't actually have to recruit from the entire world. It's not about casting a really wide net and seeing what it drags in. Instead, it's about carefully selecting one or two markets from which to recruit more students. It's about building a base of students that can grow in the years to come.

### SOME IDEAS TO CONSIDER:

1. You probably have a foundation already. Within your student population, is there a small base of students from a new source market with a large youth demographic and growing demand for study abroad? Talk with these students about why they chose your institution.
2. It can be a small world. Are there two promising markets close to one another you could focus on? For example, if you were in China at a student fair, could you also stop in Vietnam or the Philippines? Focusing on countries in close proximity can reduce travel costs and time.



STUDIO FIRMA; KIKE ANNAIZ; DREAM LOVER



Campuses have become much more diverse in the past couple of years. A key challenge for educators is to find ways to help students from new source countries feel at home.



## Show your commitment

Students are attracted to study destinations where they feel welcome. Once you've chosen a target market, it's time to roll out the red carpet for its students and their families.



The Facebook profile picture of Indonesians at Harvard makes it clear to Indonesian prospects that they will find community if they choose Harvard.

### DEDICATE A WEBPAGE

Let's say you've selected Indonesia. You could begin by creating a dedicated webpage for Indonesian students and use it to customise essential information for them. How about having a video with a current Indonesian student explaining – in Bahasa Indonesia – how to apply for a visa? Or featuring a tour of the campus led by an Indonesian student? Profiles of successful Indonesian graduates are also great, especially if they highlight employment outcomes in a way that makes success feel attainable for Indonesian prospects.

Ideally, have a live chat function on your dedicated Indonesia webpage. A Facebook page is a definite must and an affordable way to show that your institution is serious about supporting its Indonesian student community. A nice bonus: the page will take on a life of its own, with students' voices and comments often just as helpful (and authentic) as anything your marketing team could say.

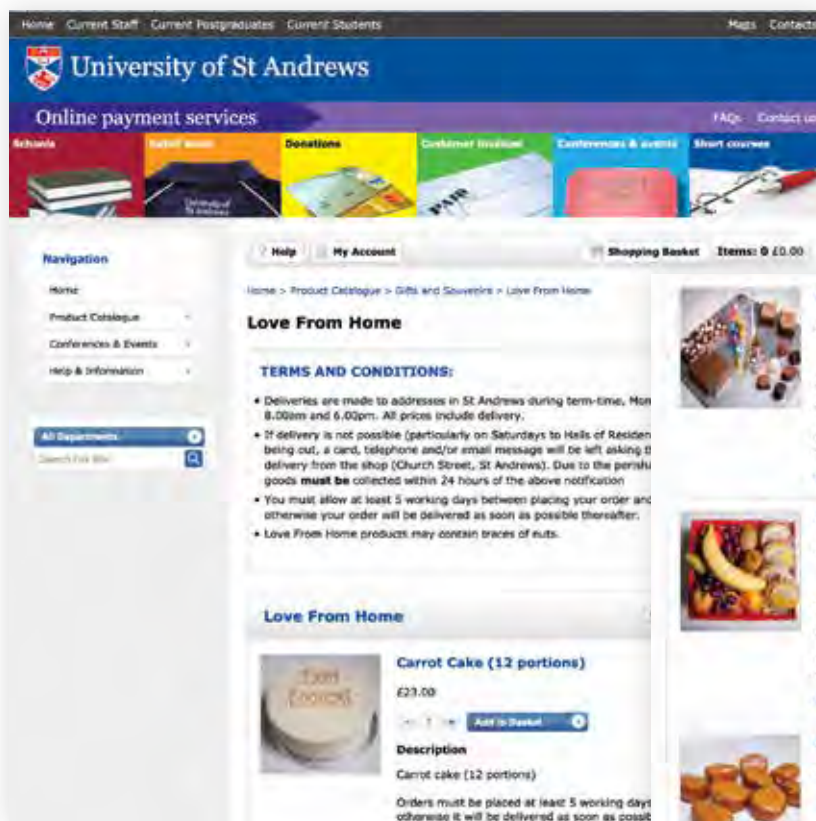


On the Indonesians at Harvard Facebook page, prospective students learn there will be a live “tips” session on a certain date. Note that there are calls for students to participate on Twitter, and a “best picture” contest featuring messaging in the Bahasa Indonesia language.

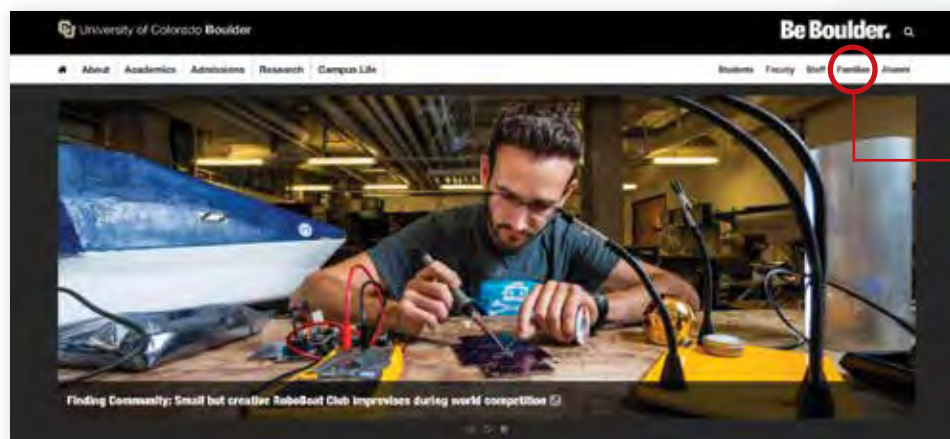
### DON'T FORGET ABOUT PARENTS!

Parents need to be reassured that their children will be safe and happy in a faraway place. They will also look for proof that there will be a serious ROI attached to their child's new credentials. Include a “Parents' Zone” on your dedicated Indonesia page, full of FAQs and testimonials.

The attention to parents should continue well after students are enrolled. A quarterly newsletter just for them is a great way to keep families involved. So too are special programmes that allow them to send love from afar. At the University of St Andrews in the UK, parents can order a “Love from Home” care package to send their children everything from carrot cake to fudge doughnuts.



Parents of students at the University of St Andrews have sweet options when it comes to which care package they will send to their children studying far from home.



The University of Colorado Boulder prioritises parents alongside students, staff, and alumni in its website navigation bar.

## Consider a loss leader strategy

If you know that students in a new market must think about affordability when choosing if and where to study abroad, consider a scholarship programme or price reduction for as many students as your budget will allow. If your budget simply won't accommodate such a programme, a contest that centres on an opportunity to bring down the costs of studying can be another way of nudging enrolments along.

For example, Acadia University in Canada is relatively small (under 4,000 students, with a student to faculty ratio of 14:1). Its staff had done research showing that affordability was a major barrier for a sizeable proportion of prospective students, so they launched a "Win Your Room" campaign that gave entrants a chance at a free residence room for a year.



Prospective students care a lot about where they will live when studying, and they often worry about the costs of accommodation. Acadia University's contest would have been hard to resist entering!



Living on Acadia University's campus looks pretty great, and the winner of the contest could do it for free for a year.



## Look outward, but keep your eye on what you've already got

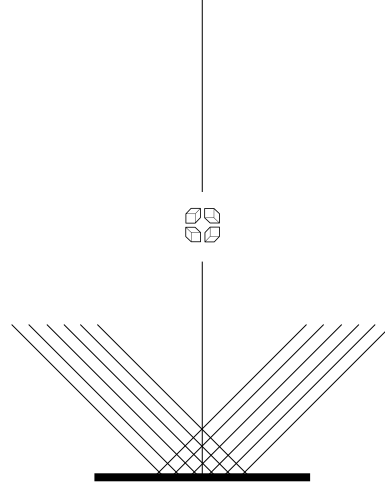
If you have a fledgling group of students from a certain country – let's stay with our Indonesian example to keep things concrete – the best way to encourage more Indonesians to come is to treat your current students right. Your campus is becoming more internationalised, and that means ensuring you have great supports in place for the Indonesians you already enrol. How are they doing with language and academic challenges? Are they making friends? Do they know how to get to a doctor, and do they feel confident enough in English to talk to that doctor about their symptoms? Do you have regular campus “mixer” events to help international and domestic students get to know each other?

Remember that your international students are in the midst of one of the most important parts of their lives – and (1) they are going to feel strongly about it, one way or the other, and (2) they are going to talk about it and take pictures and videos to send home. If you're hoping to recruit more students from Indonesia, it's imperative to help your current Indonesians have the best experience possible. Then give your satisfied crew every opportunity to share the fun they're having – with your school's hashtags.



Happy current students at SEDA College paint an attractive portrait of life on campus.





**Intra-regional  
mobility in Asia**

# CLOSER TO HOME

China, Japan, Malaysia, South Korea, and Taiwan have set their sights on becoming major destinations for study abroad, and Asian students are increasingly attracted to the lower tuition, high-quality institutions, scholarships, and connections to Asian companies they offer



**F**or the past decade, the outflow of students from Asian countries to Western ones has been nothing short of staggering. Hundreds of thousands of students from Japan, Indonesia, South Korea, Pakistan, Taiwan, Vietnam, and especially India and China travel overseas every year for degrees, contributing billions of dollars to host economies.

Western destinations have been popular because they offer so many highly ranked, high-quality universities. Asian students have traditionally chosen these schools because of the prestige attached to their degrees, a prestige that often translates into better earning potential for graduates.

But the idea that a Western degree is automatically better and more advantageous than one obtained in Asia is losing ground. Asian students now have an array of appealing options within their region for study. There are a number of reasons for this:

- A dozen of the world's 100 top ranked universities are now in Asia – in China, Hong Kong, Japan, Singapore, and South Korea.
- Asia is the world's fastest-growing regional economy; China, India, Indonesia, Japan, and South Korea are driving the most expansion. Students realise that Asian universities can help them to access industry internships and jobs in the region.
- China, the continent's powerhouse, invests heavily in its massive, multifaceted soft-power initiative known as One Belt, One Road, which stretches through more than a hundred countries and through South and East Asia. China is creating thousands of scholarships to attract Asian as well as African students. It is increasing higher education capacity and tempting Asian students from within the region to choose China rather than go overseas.
- Students everywhere are gravitating towards programmes with strong and immediate employment outcomes. Asian universities are performing very well in this regard. QS's 2019 Graduate Employability Rankings\* include four Asian universities – Tsinghua, Peking, Hong Kong and Tokyo – among the top 20 institutions. QS notes that "Asian universities are among the world's best at enhancing their alumni's job market prospects." All told, 163 of the 500 universities in the rankings are in Asia – including 26 in China, 16 in Korea, 14 in Japan, and 13 in India.
- More than half a dozen Asian countries have national



In 2019, the Times Higher Education University Rankings placed Beijing's Tsinghua University 1st in Asia and 22nd in the world.



Cultural affinities are one reason that some Asian students choose to stay in the region rather than go to the West.

NABI TANG





# China is **creating thousands of scholarships** to attract Asian as well as African students



strategies aimed at making them major destinations, with several setting international student targets. China is now the world's fourth most popular study destination after the US, Australia, and Canada.

- Many Asian institutions offer lower tuition fees than those in the West, and China in particular is drawing students through scholarships.
- Asian universities provide the benefit of being closer to home for students from the region who worry about homesickness and culture shock.

## **RISK EXPOSURE**

The top English-speaking destinations – the US, the UK, Australia, and Canada – have historically relied on Asian countries for students. For example,

- China, India, and South Korea are the top sending markets for the US, with Vietnam, Taiwan, and Japan in sixth, seventh, and eighth place, respectively. China, India, and South Korea make up 71% of all international students in the US. When Vietnam, Taiwan, and Japan are added, the six Asian source countries contribute 80% of the total.
- India, China, and South Korea are also the top sending markets for Canada. Together the three countries composed almost 60% of international students in Canada in 2018.
- Eight of Australia's top 10 sending markets are Asian: China, India, Nepal, Malaysia, South Korea, Vietnam, Thailand, and Indonesia. The first three make up 48% of all enrolments, while students from the eight countries together represent 64% of Australia's international student population.
- A 33% increase in the number of Chinese students in the UK



is the main reason that the number of non-EU students grew by 9% in the UK in 2018. China now accounts for one in five international students in the UK, and one in three non-EU students. India, Malaysia, and Hong Kong are also among the UK's top 10 non-EU sending markets.

Altogether, there are more than a million Asian students studying in the US, Canada, Australia, and the UK.

If China, South Korea, Taiwan, Japan, and Malaysia reach their international student targets by 2025, they will enrol close to 1.5 million students – the bulk of them from neighbouring countries.

## COMPETE HARDER

In addition to the many Asian institutions scoring highly on world university rankings, still more Asian schools are competing on price, a strong position given that affordability remains an issue for many Asian families. More than ever, universities in Western destinations must provide a compelling offer to students in Asian markets (e.g., through reputation, student testimonials, internships, destination marketing, scholarships, or discounting) and ensure that once students are enrolled, they keep those promises and provide excellent student supports and graduate outcomes.

In addition, coordinated national strategies aimed at attracting international students are crucial. Well-designed visa, work, and immigration policies can make a huge difference and are the major reason that Australia and Canada continue to increase their market share, in contrast to the UK and the US.

Choosing new markets to invest in is an absolute necessity to reduce the risk of exposure created by the heavy concentrations of Asian students in leading destinations. Our focus on promising African markets on page 50 provides a glimpse of the extent of the opportunity in that region.

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\*The 500 universities that made it to QS's 2019 Graduate Employability Rankings received nearly 200,000 nominations from over 42,000 employers. The rankings' methodology "focuses on how connected universities are with employers, how reputed their graduates are among companies worldwide, how likely their graduates are to enter the job market soon after graduation and, finally, the achievements of their most prominent alumni." These annual rankings were launched in 2015 to reflect students' increasing prioritisation of employment outcomes.



The University of Tokyo's Faculty of Letters, Hongo Campus.



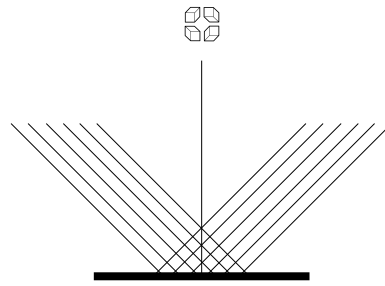
More than ever before, universities in Western destinations **must provide a compelling offer** to students in Asian markets



## Asian study destinations at a glance

COUNTRY	International student target	2018 enrolment	Top sending markets	Cost of study	Foreign student facts
China	500,000 by 2020	492,185	South Korea, Thailand, Pakistan, India, US	US\$1,700–3,100 per year for most programmes	Nearly 60% are from Asia
Japan	300,000 by 2020	298,980	China, Vietnam, Nepal, South Korea, Taiwan	US\$7,460–8,500 per year for public universities	94% are from Asia
Malaysia	250,000 by 2025	172,900 (2016)	China, Bangladesh, Indonesia, Nigeria, Yemen	Costs vary by type of programme and institution	Attractive to Muslim students
South Korea	200,000 by 2023	142,205	China, Vietnam, Mongolia, Japan, US	US\$8,750–13,000 per year for undergraduates	Just under half are Chinese
Taiwan	150,000 by 2020	127,000	China, Malaysia, Vietnam, Indonesia, Japan	US\$3,365–5,250 per year for most programmes	40% are from South and Southeast Asia





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promising growth markets  
not just in Africa, but in  
the world**

# AFRICA ASCENDING:

The demographic juggernaut driving student  
mobility in the 21st century



**OVER THE PAST DECADE,** the massive youth populations of China, India, and other Asian nations have been the main forces driving an astronomic rise in international student mobility as students in these regions have left their countries to study for a better future. Most universities in Asia have, until recently, been unable to accommodate enough students and/or to provide students with a quality education.

But now, several Asian nations are rapidly expanding their higher education systems, offering students from the region an increasingly attractive array of options to study close to home. What's more, demographics are changing in Asia, and by 2029, China's population will begin to decline.

While Asia will remain a leading source of students for many years, the number of institutions – and countries – competing for students in that region is already increasing dramatically. As competition for Asian students intensifies, another region is quickly becoming a hotspot for the next wave of student mobility: Africa.

The number of students in sub-Saharan Africa leaving their countries for higher education is growing quickly, from 296,395 in 2012 to 374,425 in 2017, a 26% increase. The college-aged populations in African countries are huge already, and they are going to get much bigger, and soon.

"Africa is the new China, population-wise," Adina Lav, assistant provost for international enrolment at George Washington University, said earlier this year in an interview for NAFSA's *International Educator* magazine. In 2030, one of every four people aged 15–24 will live in Africa, according to the United Nations. This fact is ushering in a spike in demand for study abroad that will only get more intense.

**HOW OLD IS YOUR CONTINENT?\***

Sub-Saharan Africa: **19**

South America: **31**

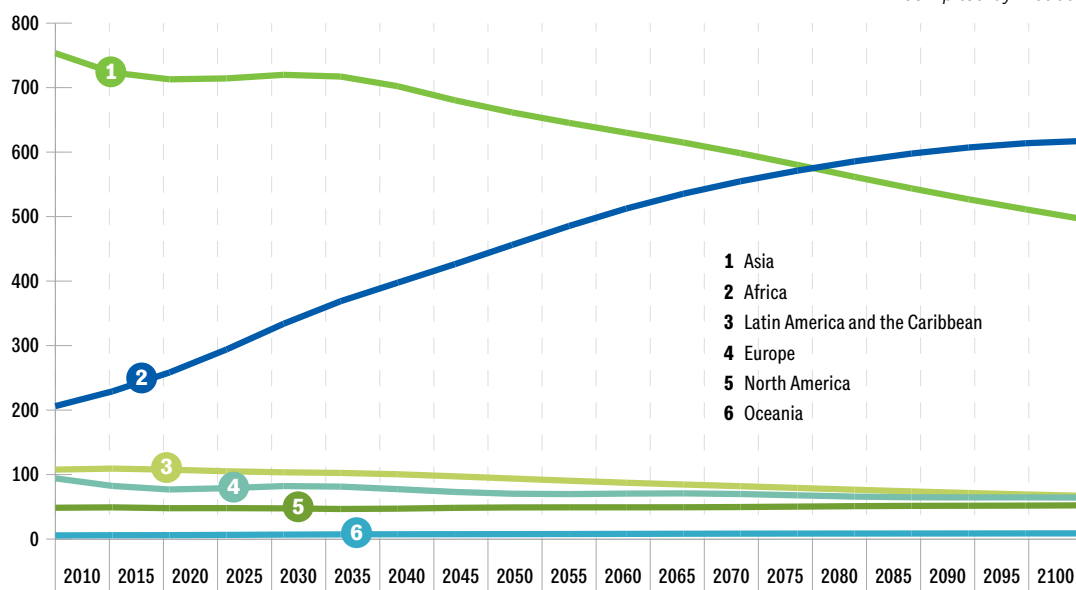
Asia: **31**      Oceania: **33**

North America: **35**

Europe: **42**

*\*Median ages across the world in 2018 according to data from CIA World Factbook, Gates Notes, and Statista, compiled by Visual Capitalist*

**YOUTH POPULATION (IN MILLIONS) BY GLOBAL REGION: 2010–2100**



*Actual and projected populations of 15–24-year-olds by global region  
Source: United Nations 2019 World Population Prospects*



### CHINA SURGES TO #2 DESTINATION FOR AFRICANS

France has historically been – and remains – the largest destination market for African students (especially from North and West Africa); it enrolls roughly 95,000 African students annually. In second place? It was once the UK and the US, but China has surpassed them. According to UNESCO figures, UK and US universities enrolled about 40,000 African students each in 2017, while Chinese higher education institutions hosted 50,000 in 2015. The number in China is now thought to be 60,000 – 20 times what it was in 2005. African engineering students are particularly drawn to Chinese programmes, which are often taught in English and are much less expensive than engineering programmes in the US or UK.

For years, China has been playing the long game, investing billions of dollars in infrastructure in African countries. The first Forum on China-Africa Cooperation was held in 2000, and since then Chinese capital in African markets has grown dramatically. Healthcare and education systems have been major beneficiaries. As one African student told the *China Daily* online newspaper, “My country, as well as most others in Africa, lacks professional doctors. China is so developed in medicine and has helped my country a lot in building schools and hospitals. I appreciated that and thought it might be a good place to learn medicine.”

**CHINA'S STRATEGIC MODEL** for being the dominant foreign power in Africa and for recruiting students from the region goes something like this:

1. Chinese companies and government agencies set up operations in African countries and establish development projects such as schools and hospitals.
2. The Chinese government offers tens of thousands of scholarships per year for African students to study in China, as well as lower tuition relative to what Western institutions demand from international students.
3. African students return home with a Chinese degree and/or Chinese-language proficiency, ready to be employed in Chinese-owned companies in their country.

So far, the model seems to be working exceptionally well.

### UP NEXT: FOUR AFRICAN MARKETS IN FOCUS

On pages 54–59, we look at why Egypt, Ghana, Kenya, and Nigeria are capturing the attention of recruiters around the world.



Classroom lessons in Chinese.



# EGYPT

**LOCATION**  
Northeast  
Africa,  
bordering  
Israel, Libya,  
and Sudan

Egypt is the most populous country in the Arab world, and its economy grew by more than 5% in 2018. One in five Egyptians is aged 15–24, and fully a third of them are unemployed. Of those who are unemployed, 34% hold degrees.

Most university-bound students attend one of Egypt's 24 free public institutions, while students who achieve lower grades in high school tend to enrol in one of the country's 23 private institutions. Many graduates do not find jobs matching their skill level.

With a higher education crisis looming, the government passed legislation in 2018 that allows international branch campuses to operate in the country. As well as offering domestic students a better future, Egypt hopes to become a Middle Eastern education hub through this new strategy.

Given Egypt's massive youth population, however, even a significant expansion of the domestic higher education sector will not accommodate enough students. The number of Egyptian students going abroad for higher education has nearly tripled in the past decade, from 12,300 in 2008 to at least 32,000 today, and this growth trend will almost certainly continue.

Roughly a third of Egyptian students are studying in Saudi Arabia or the UAE. The US is third, with just under 3,600 Egyptian students as of March 2019. While Egyptian enrolments in US institutions have been relatively flat, enrolments have increased by 78% in Canada over the past five years and now number around 2,500. Other top destinations include France, Malaysia, and the UK, each with roughly 2,000 Egyptian students in 2017/18.

**KEYS TO THE MARKET:** Colleges and universities establishing a presence in Egypt would do well to focus on linkages with the private sector to connect students to the real needs of the marketplace. SMEs (small- and medium-sized enterprises) are major sources of employment in Egypt, and therefore programmes fostering entrepreneurship and innovation are much needed.

## DEMOGRAPHICS

- POPULATION** \_\_\_\_\_ 101 million
- POPULATION GROWTH RATE** \_\_\_\_\_ 2%
- POPULATION AGED 15–24** \_\_\_\_\_ 19%
- POPULATION UNDER 25** \_\_\_\_\_ 52%
- YOUTH UNEMPLOYMENT** \_\_\_\_\_ 34%
- LANGUAGES** \_\_\_\_\_ Arabic (official), English and French widely understood by educated classes
- RELIGIONS** \_\_\_\_\_ Muslim (90%), Christian (10%)



A view of Cairo, Egypt.





# GHANA

A democracy that consistently ranks in the top three countries in Africa for freedom of speech and of the press, Ghana is a peaceful oasis in a region often plagued by unrest. Its economy is growing steadily; 2019 is expected to be the third year of GDP growth exceeding 6%.

However, there is inadequate economic diversification. Many jobs in the country's dominant agricultural and resource extraction industries require little formal skills training, and youth unemployment is disproportionately high among those with some higher education. A dearth of job opportunities at home motivates Ghanaian prospects to look carefully at post-graduate work and immigration policies in destination countries. A recent Pew Research Center survey found that three-quarters of Ghanaians would emigrate if they had "the means and opportunity."

With Ghanaian universities able to accommodate only around 20% of those who apply, and given quality issues in the private education sector, demand for study abroad is increasing sharply. UNESCO counted 12,560 Ghanaians studying abroad in 2017, up 40% from 8,965 in 2012. This is a conservative estimate, given that there are at least 7,000 studying in China alone.

While Ghanaians traditionally favoured the US and the UK as destinations, they are now considering a much wider range of study abroad options. Australia, Canada, China, South Africa, and Ukraine have carved out strong positions in the market. China is offering thousands of scholarships per year to Ghanaian students, and Germany, Japan, and Russia are also notable for their incentives.

**LOCATION**  
West Africa, bordering Burkina Faso, Côte d'Ivoire, and Togo

**KEYS TO THE MARKET:** Twenty-two accredited agencies are recognised by the Government of Ghana. As Michael Aidoo, the CEO and executive director of the Accra-based agency CELC International, explains, "In Ghana, you have to be a registered agency. You must register with the Ghana Education Service. Not only that, you should be a registered company in Ghana. That is the most important thing."

## DEMOGRAPHICS

<b>POPULATION</b>	30 million
<b>POPULATION GROWTH RATE</b>	2%
<b>POPULATION AGED 15-24</b>	19%
<b>POPULATION UNDER 25</b>	57%
<b>YOUTH UNEMPLOYMENT</b>	14%
<b>LANGUAGES</b>	English (official and language of instruction), Hausa (among Muslims)
<b>RELIGIONS</b>	Christian (71%), Muslim (17%)



Independence Arch, Accra, Ghana



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# KENYA

**LOCATION**  
East Africa,  
on the Indian  
Ocean, between  
Somalia and  
Tanzania

Kenya boasts one of the most diversified economies in Africa; agriculture and resource industries remain the most important sectors, but manufacturing, technology, tourism, and financial services are also well developed. The economy grew by 5.7% in 2018 and is expected to take a similar track in 2019.



The British Council projects that Kenya will have a population of 5.7 million college-aged students by 2024. These students hold the promise of meeting Kenya's goal of becoming a middle-income country by 2030, but at present, its education system does not equip enough of these students with skills the country needs. Kenya's higher education system has expanded rapidly in recent years thanks in large part to the entry of several private universities and polytechnics. But there are persistent quality concerns and government funding has been declining.

UNESCO estimates that 14,000 Kenyans are studying abroad, and the US, Australia, the UK, and South Africa host the bulk of them. That said, Kenyan outbound study has been essentially flat for several years. Partly this is because many Kenyans no longer see the value in higher education and need to find jobs as soon as possible. Demand is growing substantially for skills training. China is now a major player in providing vocational education in-country, with many graduates of programmes going on to find jobs in China-owned, Kenya-based companies.

This is a market ripe for some of the disruptive innovations transforming post-secondary education, such as short-term vocational training and micro-credentials.

**KEYS TO THE MARKET:** Quality vocational education is in demand in information technology, accounting and project management, geology, engineering, pipe fitting, welding, drilling, and operation and maintenance of equipment used in resource extraction. Partnerships with corporations to deliver skills training could be promising, and Kenyans will see value in educators that can match them with employers.

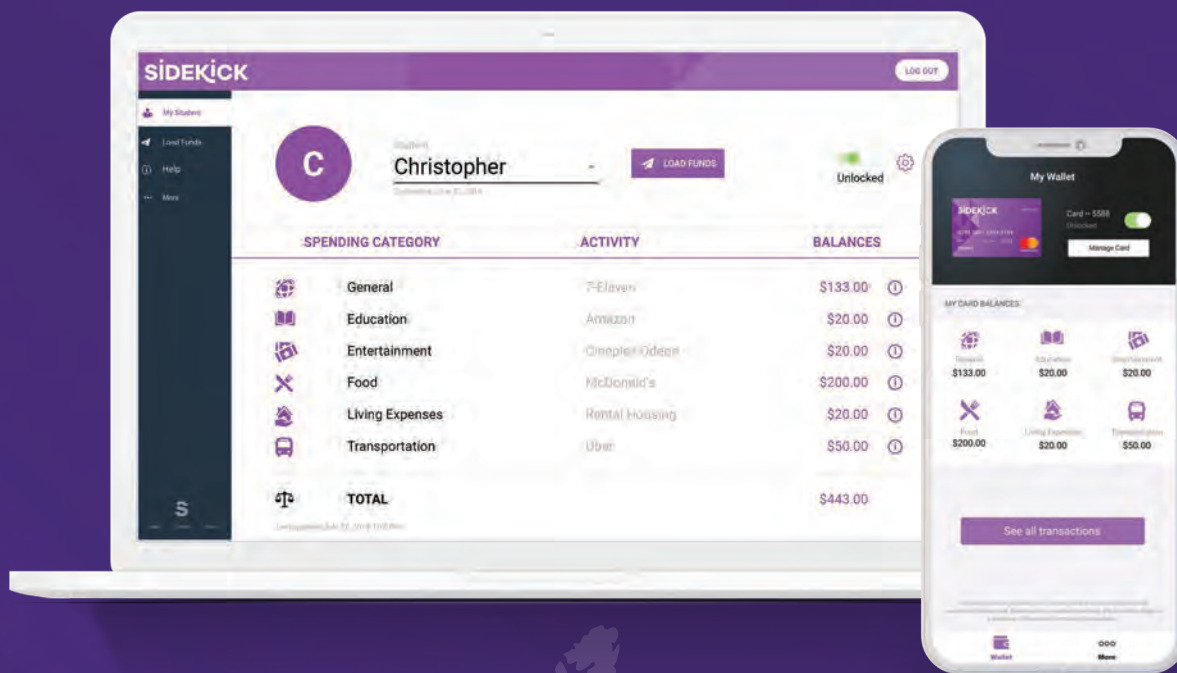
Looking across a park to downtown Nairobi, Kenya's capital.



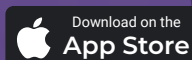
## DEMOGRAPHICS

<b>POPULATION</b>	_____	52 million
<b>POPULATION GROWTH RATE</b>	_____	2%
<b>POPULATION AGED 15–24</b>	_____	20%
<b>POPULATION UNDER 25</b>	_____	59%
<b>YOUTH UNEMPLOYMENT</b>	_____	19%
<b>LANGUAGES</b>	_____	English and Swahili (official and language of instruction), Hausa (among Muslims)
<b>RELIGIONS</b>	_____	Christian (83%), Muslim (11%), small Hindu and Sikh minorities

# Control and Track Student Spending



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# NIGERIA

Nigeria's domestic higher education system simply can't educate the number of young people applying for spaces. According to Nigeria's National Universities Commission, between 2012 and 2017 fewer than 20% of applicants to Nigerian universities gained admission, leaving 6.3 million qualified students without a place. One in five Nigerians is aged 15–24, and this is the fundamental reason that Nigeria will be one of the fastest growing markets for study abroad for the foreseeable future.

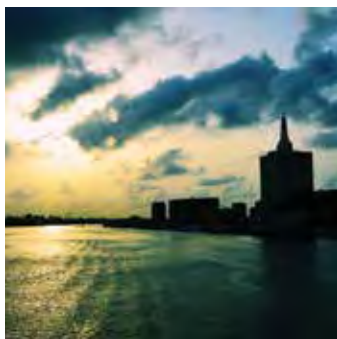
UNESCO estimates that there are around 90,000 Nigerians studying abroad today.

The country shook off a two-year recession in 2017 and returned to modest growth of 1.9% in 2018. While the government has endeavoured to make the economy less dependent on oil and gas, diversification is happening slowly and jobs outside natural resource extraction and agriculture are scarce: nearly a quarter of Nigerians were unemployed in 2018 and many more were underemployed. Boko Haram's terrorism continues to plague the country and widens the divide between the poorer North and more affluent South. Basic infrastructure is generally weak, with frequent labour strikes, underfunded hospitals, and electricity shortages.

Many middle-class Nigerian families have a common goal: to start new lives in other countries. For that reason, Nigerian prospects, like Ghanaian ones, tend to look closely at immigration opportunities in destination countries. Top destinations include the US, with 15,980 students in early 2019; Malaysia, with roughly 13,000 in 2019; Canada, with 11,290 in 2018; and the UK, with 10,540 in 2017/18. Ghana and South Africa are popular regional hubs drawing thousands of Nigerians.

**LOCATION**  
West Africa,  
bordering Niger,  
Chad, Cameroon,  
and Benin

**KEYS TO THE MARKET:** In Nigeria, vocational education retains a stigma; families see practical rather than academic programmes as appropriate only for the lower classes. Yet highly skilled graduates in specific trades are the employees Nigeria most needs. Intelligent branding of vocational education – combatting outdated stereotypes – will be important for colleges recruiting in Nigeria. Nigerians are also frustrated by student visa hassles and will look for destinations where their visa applications are most likely to be accepted.



Lagos, Nigeria, seen from Five Cowries Creek.

## DEMOGRAPHICS

<b>POPULATION</b>	_____	201 million
<b>POPULATION GROWTH RATE</b>	_____	3%
<b>POPULATION AGED 15–24</b>	_____	20%
<b>POPULATION UNDER 25</b>	_____	62%
<b>YOUTH UNEMPLOYMENT</b>	_____	37%
<b>LANGUAGES</b>	_____	English (official), Hausa, Yoruba
<b>RELIGIONS</b>	_____	Muslim (52%), Christian (47%)



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# OUTREACH

Inspire action and sharing from students through emotional branding and video



HEX



# In the sharing marketplace, video is king

Imagine a group of high-school friends who have all decided they want to study abroad but are not yet sure which school, or even which country, they will choose. At night, before bed, they search the Internet for ideas, and when they find cool links and content about schools, they send these to their friends in other houses, neighbourhoods, even cities.

What do you think they're most likely to be sending? If you said "video," you're right.

## Every school has a story

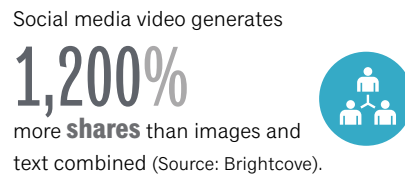
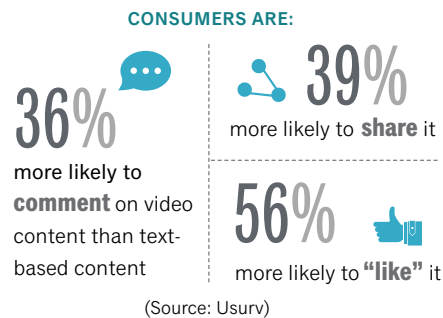
If your school is doing amazing things around environmentalism or giving back (i.e., charity and volunteerism), or if it's doing standout work in specific fields (e.g., an alumnus has been nominated for a prestigious prize in medicine), you already have a strong foundation for a great video.

You also have solid fundamentals for video storytelling if your school is providing students such benefits as exciting internships, jobs, accommodation, or life-changing experiences.

And don't underestimate the most important story of all: happy students going about their life on campus. As we note on page 63, student vlogging can be an excellent way to express that aspect of your school.

Most importantly, produce videos that students will really enjoy watching. Videos that are funny, emotional, or inspirational – and produced and distributed strategically – have a good chance of spurring actions such as shares and inquiries among student viewers.

## Video swamps the web!







## WINNING STRATEGIES

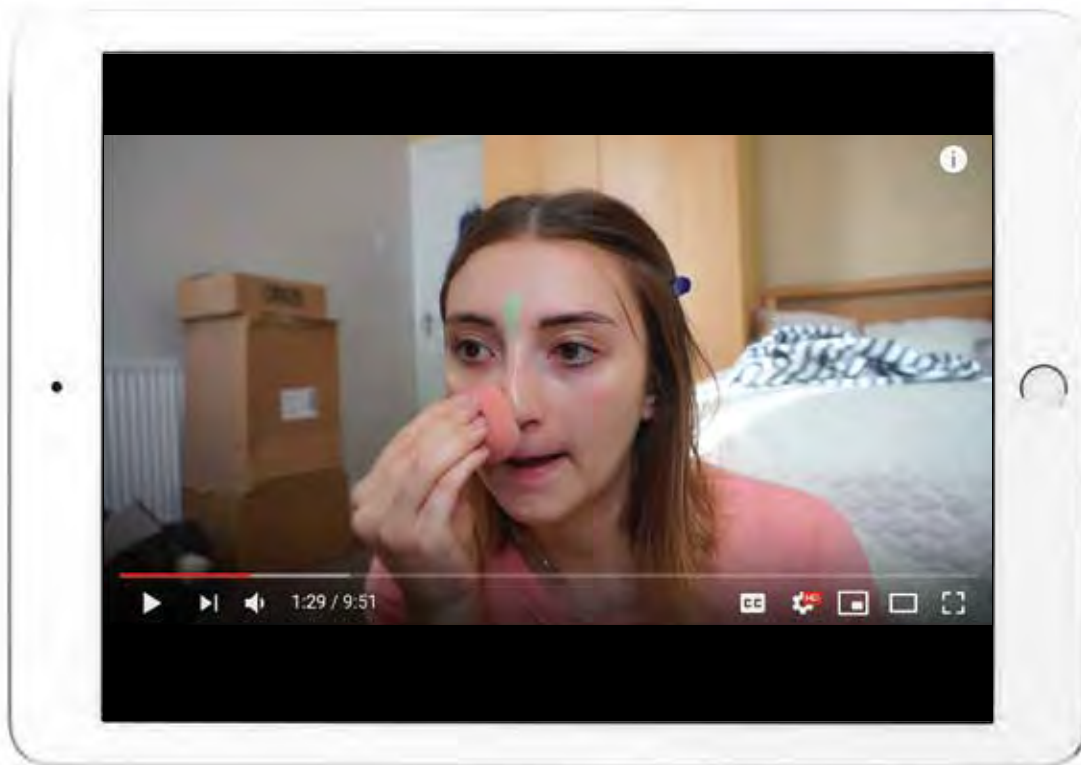
### 1 GET STUDENTS VLOGGING

Vlogs – video blogs – are hugely popular among high-school and college-aged students, who love to watch interesting people posting about both exciting and ordinary parts of their day. One of the best things about vlogging is that it's such an inexpensive video format and it can be posted on YouTube, Facebook, the school website, or ... wherever!

Below, University of Exeter student Selina Ozay applies makeup during a “Day in the Life” instalment of her much-watched vlogging series. As she does, she discusses her gym routine, reading

load, and volunteer work. It sounds mundane, but instead it's oddly watchable and gives viewers a real feel for life at “uni.”

To be successful, a vlog must feel real, slightly amateur, and personal. Student vlogs communicate the culture of a university in highly relatable ways. For example, the University of Exeter would almost certainly not discuss student life through a segment showing someone applying their make-up, yet Ms Ozay's decision to do it feels compelling and engaging.



University of Exeter student Selina Ozay's “Day in the Life” video has so far been viewed 86,508 times and received 101,000 likes.



2

**CREATE A FACEBOOK VIDEO**

With so many people on Facebook, it can make sense to post a video right in users' feeds rather than direct them to another platform. A Quintly research study found that native video on Facebook (i.e., video uploaded directly to Facebook) resulted in 168% more views than videos first uploaded to YouTube then shared on Facebook.

When you think about content for video, remember that if you have a strong campus culture with happy students, you already have the makings for a good video. BambooHR (see page 65) may not be a school, but there's a lesson to be learned from the HR firm's gorgeous video focusing on work/life balance. The video highlights the phenomenal

lives employees lead when they are finished their work, work that is portrayed as fun and fulfilling.

A school video putting the focus on students' lives outside of the classroom – e.g., hiking together, celebrating birthdays at local restaurants, playing sports, laughing – would be the educator equivalent to the BambooHR video strategy of putting the focus on recreation as a means of entertaining students and encouraging shares.

The BambooHR video runs just over two minutes, a totally acceptable length for a native Facebook video. Just make sure to capture your audience's attention quickly, ideally within the first 10 seconds or so.



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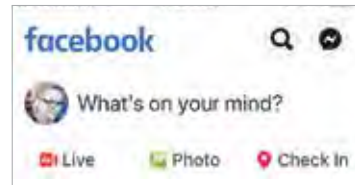


3

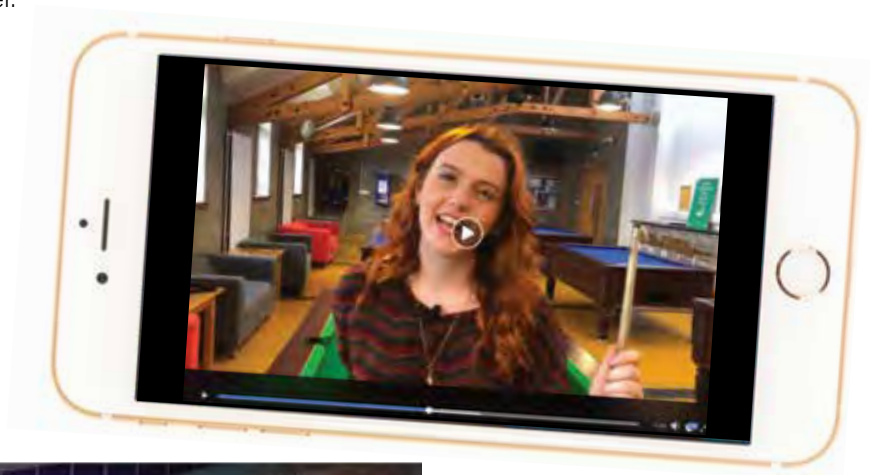
GO LIVE

In between professionally produced videos, consider “going live” on Facebook to show a behind-the-scenes peek at life on campus. Sports events, move-in and graduation days, and orientation week all make for excellent live streaming opportunities. Students prioritise honesty from brands, which is why a live segment that has not been edited can be so captivating and engaging. *Adweek* reports that “viewers of Facebook Live videos comment 10 times more than they do on videos that are not live because they can engage in the real-time conversation with other viewers.”

A perk of Facebook Live is that live videos will stay on your page or profile for viewers who missed the live event to see later.



**TO GO LIVE:** Go to the “live video” option found in the mobile and desktop versions of Facebook under “create a post.” Click “go live” when ready. Click “finish” when you want to end the video. Post it, then make edits if needed.



BambooHR’s video story is that work/ life balance is a core value at the firm.



Third-year University of Limerick student Clodagh Guerin stars in the student-produced video “Our 7 favourite places on campus.”



4

**CREATE CALLS TO ACTION ON YOUTUBE VIDEOS**

In an average month, 80% of 18–49-year-olds watch YouTube, which is as good a reason as any to post your videos there on a channel you create. But too many schools and businesses are erratic in their posting or they’re missing an essential strategic layer to their execution. The best way to get regular views and shares on YouTube is to post compelling content on a regular schedule and to include calls to action (CTAs) to drive the results you’re looking for. Examples of actions to ask viewers to take include:

- Subscribing to your YouTube channel;
- Liking or commenting;
- Visiting, liking, and following your social media accounts (e.g., Facebook, Twitter, Instagram) for more content;
- Visiting the school website to find out more;
- Signing up for emails;
- Chatting with a school representative.

Hootsuite notes that there are various ways to include CTAs:

**Direct Mentions:** Look into the camera and verbally tell viewers what you want them to do.

**Video Descriptions:** Ask viewers to comment, share, or like your video in the description itself.

**End Cards/Screens:** Add a customisable screenshot to the beginning, middle, or end of the video. These powerful visual cues add punch to your CTA.



Visitors to United International Business Schools' YouTube channel see that the school commits to a regular schedule and posts lots of content.

**Tips for going live**

- Face a window for the best natural light. Avoid wearing glasses, since these attract glare.
- An external microphone can be a good investment to improve sound quality.
- Film horizontally rather than vertically for a better video experience. If filming on a phone, click the edit button at the top for a nice filter.
- Make practice videos. You can ensure you're ready for prime time by going to your Facebook profile and selecting "only me" before recording.
- Make it personal. Maybe a student has just won an award or been selected for a popular internship. Maybe a student is cooking a traditional meal from their culture for other students. Where there's emotion, there's a great opportunity for live video.
- Pump up the energy. No monotones! Lots of smiles!
- Ask for likes, comments, and shares as these boost a post's popularity on Facebook.

*Adapted from The WordStream blog*



Who could resist clicking on a rocket video? The University of Sydney's Instagram video is full of energy and excitement.

## 5

### UPLOAD VIDEO TO INSTAGRAM

Nearly three-quarters of teenagers (72%) used Instagram in 2018, up 20% from 2015, and 71% of young adults aged 18–34 were on it, compared to only 34% in 2013. Need we say more? Upload short videos to Instagram!

Don't forget to research the best hashtags to use. Include both hashtags general enough to cover hashtags being searched by students on Instagram (e.g., #studyabroad) and tags specific enough to reach your target customers (e.g., #studyinFrance).

And consider running Instagram video ads if your organic videos don't seem to be getting enough reach. Instagram's paid advertising options can boost your following and your results.

Include general and customer-specific #hashtags with your uploaded video to increase search results



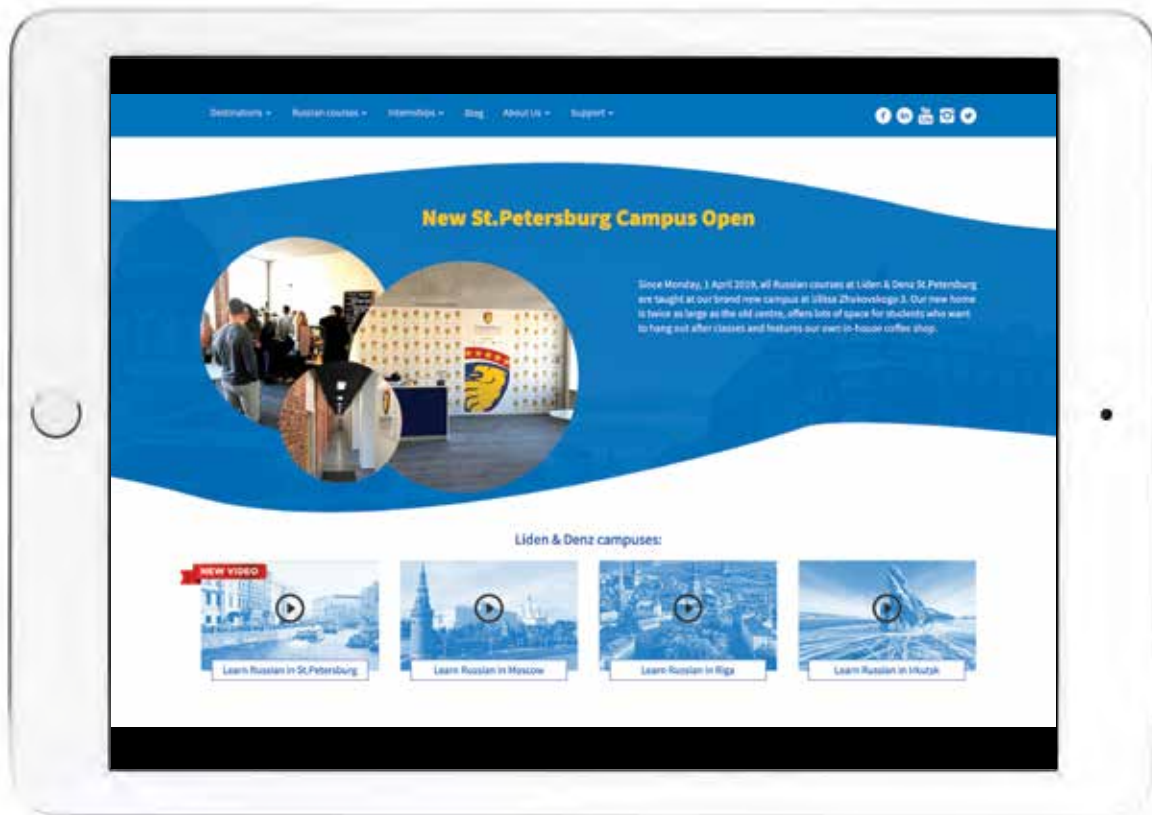
6

**POST VIDEO ON THE SCHOOL HOMEPAGE**

Yes, right on the homepage! It's a great way to get users quickly engaging on the site and is a good strategy for adding a human element to a page that can sometimes tend towards the overly corporate. Vlogs are probably too personal and specific for the homepage, though. Stick to professionally made videos that clearly communicate the culture and passion around your school.



Delfin English-language school in Ireland posts multiple videos on its homepage.



On the Liden & Denz Intercultural Institute of Languages homepage are four videos, one of which features a red “New Video” ribbon that makes the page feel fresh and well managed.



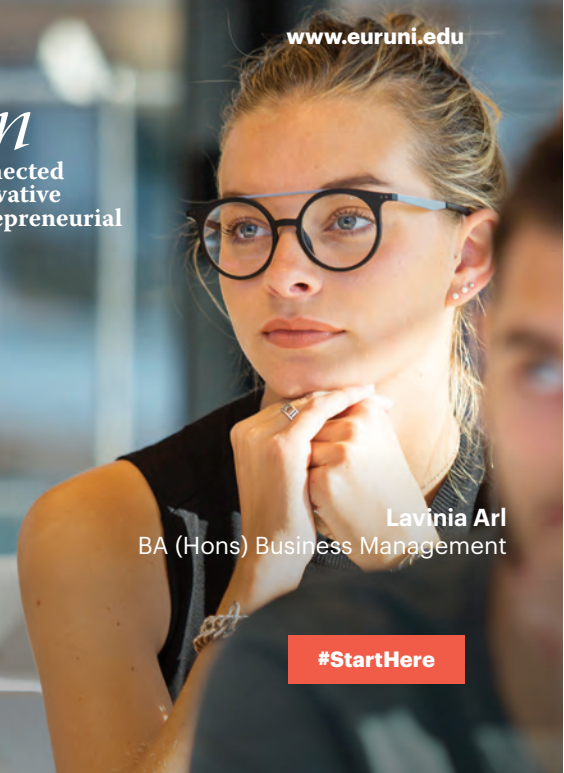
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**“The experience of being at ILAC is more important than anything else. The teachers and staff feel supported and part of a family, so it’s easy to pass that on to students. The people are what make ILAC feel like you’ve come home.”**

*Melissa Johnson has been teaching at ILAC for over 15 years and currently leads workshops for teachers on the power and importance of connection.*





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# “BRAND IS MORE IMPORTANT THAN PROFIT”

– Jonathan Kolber, CEO, ILAC

If you ever walk up Yonge Street towards Bloor in Toronto, you'll find the sidewalk flooded with people of all ages and ethnicities, enthusiastically speaking English in a multitude of accents. When you look closer to try to understand what brings these people together, you'll notice that each is holding a textbook that says, “Dream big.”

Ah, yes. You have arrived at ILAC.

I've now been a consultant at ILAC on and off for 10 years, and there is a reason I keep coming back.

## NURTURE THE BRAND AND THE CULTURE ABOVE ALL

Jon Kolber, ILAC's co-founder, along with Ilan Cohen, always signs his emails with the words, “Brand is more important than profit.” I asked him what that actually meant the other day and he was quick to answer.

“You focus on creating a **brand** that clients want and you build a culture of excitement and employee engagement. Think about the student experience first and profits later. When our accountant urges us to cut costs, we always ask how it will affect our students. If it isn't good for the client experience, we simply don't do it.”

## WHAT IS THE ILAC BRAND, EXACTLY?

“It's opportunity,” says Jon. “When you walk into ILAC you realize there is opportunity here – for students to learn, realize their dreams, and make friends from around the world, and for teachers and staff to build careers based on their individual strengths and ideas.”

Almost all employees at ILAC are recent immigrants to Canada, and many are former students. Some of them have even met and fallen in love at ILAC, gotten married, and had children. No wonder ILAC feels like a family – it functions like one.

“If you want your employees to give excellent customer service to your clients, it starts at home, meaning internally,” says Jon. “Culture, employee satisfaction, and employee engagement are the most important ways a business creates value. Companies with the highest employee engagement outperform by 3% annually. Focusing on employee culture is what makes good companies great. You cannot just say it is important, you have to make it the #1 goal.”

I walked into ILAC the other day for the first time in almost a year. Throngs of international students along the street led me into the

campus like a UN delegation parade. Inside, I took the elevator up several floors and was greeted at every turn by hugs and kisses from staff from Turkey, Brazil, Colombia, Venezuela, Russia, and Lebanon. Employees joked with each other and shared updates about their current projects and personal lives. I was struck by how long many of the employees had worked there and how they had watched each other grow up, not

**“Focusing on employee culture is what makes good companies great. You cannot just say it is important, you have to make it the #1 goal.”**

just in their careers, but as people. You can't manufacture that kind of dynamic. Just like all families, ILAC is *sui generis* – Latin for “of its own kind.”

People always ask me why ILAC is so successful. Is it the incredible marketing campaigns? The beautiful campuses? The extensive agent network? Yes, it's all of these things. But most of all, students and staff are what give ILAC its competitive advantage. They're the ILAC brand.

— *Contributed by Bogumila Lapinski Anaya*



# Emotion-based branding connects feelings to action

Let's say you have a fantastic wordmark, expertly designed marketing collateral, and website navigation that's intuitive and clever. Your brand is in good shape then, right?

Not necessarily, according to brand strategist Richard Gillingwater, who helps organisations around the world to communicate who they are and reach their audiences. Mr Gillingwater contends that if a school brand doesn't trigger emotion, students and other stakeholders will not act in a way that benefits the brand. They won't be interested in it and they won't engage with the school's programmes and services. In contrast, a school that can inspire real feeling among students will be able to create an active, dynamic, exciting bond that can be leveraged in different ways and over time.

## WE FEEL, THEREFORE WE ACT

Mr Gillingwater is a featured speaker at conferences around the world, and one of his trademark presentations centres on a concept known as "emotional branding," which is based on the belief that consumers *feel* more than *think* about brands. When a school inspires strong, positive feelings among students, it is often because it has demonstrated that it understands their needs and reflects and even amplifies their style and personality. Emotional branding is a powerful lever for purchasing and loyalty over time.

To stimulate a desired feeling among students, institutions must discover the answers to three questions:

### 1. What do prospective students need?

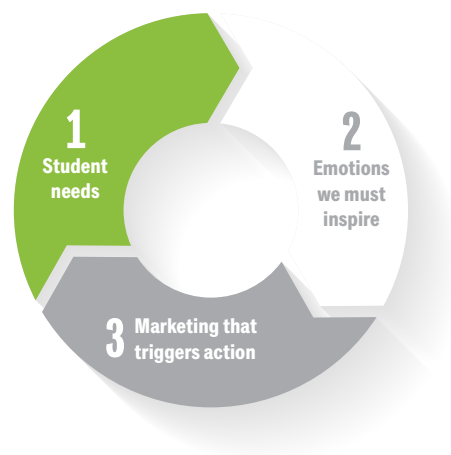
Ask current students for help in pinpointing student needs, which might include, "I need to make friends while studying abroad," "I need this programme to lead to a job I want," "I need to be able to speak English proficiently for my career."

### 2. What emotions do we want to inspire at every brand touchpoint?

Maybe it's excitement. Curiosity. A sense of being part of something cool and important. Whatever the emotion, the brand should strongly evoke it.

### 3. Does our marketing reflect students' needs and does our outreach inspire a tangible feeling?

Or are we merely producing information that has nothing really wrong with it but isn't wonderful either? If so, it will feel flat and limited in its ability to generate action.





**Richard Gillingwater shows his audience a Radley College case study illuminating the power of emotional branding.**

With answers to those questions in hand, consider how the needs of students and the desired emotion can inform storytelling, dialogue, and imagery across all business touchpoints. For example:

- The website
- Social media channels
- Virtual tours and video
- Student fairs
- Admissions staff
- Welcome centres
- Orientation week
- Newsletters

As Mr Gillingwater emphasises, ensuring that the same brand story is told at every opportunity makes it more likely that the brand will define itself and resonate among students at every step of the enrolment funnel.

## STUDENTS WANT EXPERIENCES, NOT SERVICES

At its best, emotional branding evokes an experience and a sense of community rather than product or service features. It uses storytelling rather than description, and it prompts feeling more than cognitive reasoning. Student testimonials, videos, expertly managed social media channels, and personalised emails are some of the areas in which schools can activate emotion.

Mr Gillingwater has worked with the prestigious British boys' school Radley College on the school's identity and storytelling. In his presentations, he notes that the vision he proposed to Radley executives – that Radley inspires greatness in its students – captured the spirit and benefits of studying at Radley College, but in and of itself, the stated vision was not enough. Mr Gillingwater shows conference audiences a powerful video that brings the idea to life, infusing it with

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## Partnering to provide health insurance for international students in the US

International students planning to study in the United States will quickly realise the US healthcare system is unique among the world's advanced economies. There is no uniform system as such, nor any universal medical coverage. In practice, the system is quite complex with literally thousands of healthcare providers, and with funding provided by a combination of public and private payers.

Roughly two-thirds of Americans are now covered by private insurance plans. Every international student is eligible to join a private insurance programme as well, and many US institutions require that foreign students be enrolled in an approved plan during their studies.

"First and foremost, we are focused on ensuring that foreign students in the US can access healthcare when and where they need it," says David Opperman, the president of specialty insurance provider PGH Global. "The system demands a lot of expertise in terms of matching plans and services to specific institutions, and that is a big part of the professional advising we provide to students and partners."

Indeed, managing healthcare across a variety of providers and institutions takes on a whole other dimension when it comes to international students. Foreign students in the US (or their family members or dependents) may require services in their native language, even as they move among institutions or from one part of the country to another.

"The most important thing for us is that students have access to care wherever they go," adds Mr Opperman. "We connect students with services in 170 languages, and with online and telehealth service the students can access care in a way that is convenient and comfortable for them at any time of day. International students are highly mobile and so that continuity of care is very important as they move to different parts of the country, or for that matter as they progress from high school studies in the US to university or on to optional practical training."

PGH Global is now bundling its US health expertise into a new online dashboard that can be customised for the use of education

agents. The goal, says Mr Opperman, is to provide a turnkey solution that allows agents to better advise students and their families about the US health system, but also to provide agencies with a new value-added service and an additional revenue stream.

**"We connect students with services in 170 languages and with online and telehealth service"**

"We believe that high-quality insurance advising and insurance services could be an important differentiator for many agencies in an increasingly competitive marketplace," says Mr Opperman. "We are now partnering with quality agents in markets around the world, which shows not only the high demand for our services, but also the important role education agents play in advising students on every aspect of life in the United States."



**Radley College ensures that its emotional core concept runs through all marketing communications.**

emotion. The video positions Radley as a nucleus for boys who go on to be powerful and engaged citizens. This story inspired Radley College’s marketing and communications, allowing the school to reach out to various stakeholder and student groups with the same emotional core concept.

### **FIVE WAYS TO THINK ABOUT EMOTIONAL BRANDING**

Mr Gillingwater summarises his presentations with five points schools can use to anchor their emotional branding strategies:

1. It’s not what you say, it’s how you make people feel.
2. Tune in to your own emotions and assess the

strength of them when you look over your marketing and communications – if you don’t feel anything, chances are your students won’t either.

3. Build experiences in collaboration with communities.
4. Define how you want to make people feel.
5. Find ways to activate these feelings and be on the lookout for what may be disconnecting students from this experience.

Finally, Mr Gillingwater notes, look for ways to go one step further with students to make sure they really feel special. That extra effort might just be what differentiates you from the competition and provokes the actions that most benefit your brand.



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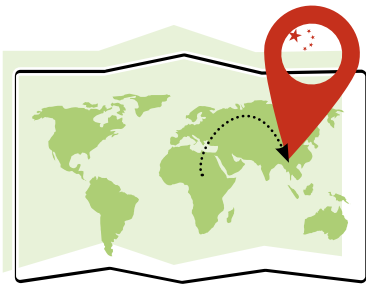
\*In the 2018 QS rankings Berlin was rated seventh best student city in the world.

\*\*Upon successful graduation, students are eligible to apply for an 18-month job-seeking residence permit with the Foreigners' Office. This will allow them to work in Germany without any limitations while they look for a job that corresponds to their qualification.



# FACTS & FIGURES

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



## #2

China is now the second most popular destination for African students, after France (Source: Center for Strategic and International Studies' ChinaPower project).

## 20.5%

Increase in the number of Brazilian students abroad in 2018 compared with 2017 (Source: Brazilian Educational and Language Travel Association/Belta).

## 20

Hours that English-language students in Malta on courses of at least three months can now work, beginning in their 13th week of study (Source: ICEF Monitor).

## 1 IN 5

One in five prospective students said the UK's decision to leave the EU has made them less interested in studying there (Source: QS).

## 45%

Nearly half of Indonesian high school students said they could go abroad for study only if a scholarship were available (Source: AFS Intercultural Programs).

## 7 IN 10

Number of people today in jobs where the future of their career, profession, or industry is uncertain (Source: Pearson and Nesta, *The Future of Skills: Employment in 2030*).

## 2030

A decade from now, 75% of global STEM graduates will live in BRIICS countries (Brazil, Russia, India, Indonesia, China, and South Africa), compared with 4% in the US and 8% in Europe (Source: OECD report: *How is the global talent pool changing 2013, 2030?*).

## 3.6 MILLION

A 1% annual increase from 2015 to 2030 in non-traditional students aged 24+ in BRIICS countries would translate into 3.6 million more students (Source: Study Portals report: *Envisioning Pathways to 2030*).

## 42%

Projected increase in the youth population (aged 15–24) in Africa from 2015 to 2030 (Source: United Nations).

## MORE THAN 11%

Growth in the number of international students in Australia from 2017 to 2018, following growth of 12.6% from 2016 to 2017 (Source: Government of Australia).

## 350%

Growth in the number of Indian students studying in Canada since 2014 (Source: Immigration, Refugees and Citizenship Canada).

## 6 IN 10

Proportion of admissions directors (57%) at American colleges in 2018 who said they were concerned about maintaining international student numbers at current levels (Source: *Inside Higher Ed*).

## 9

Instagram posts with nine hashtags receive the most engagement; 30 hashtags is the limit for regular posts (Source: TrackMaven).

## TOP 2

The top two non-academic factors influencing students' choice of university are the availability of good transit (41%) and the cost of accommodation (30%) (Source: Sodexo UK's University Lifestyle Survey).

## 73%

Ghana's gross secondary school enrolment rate jumped from 57% in 2012 to 73% in 2017, compared with 2017 rates of 42% in Nigeria, 46% in Pakistan, and 65% in Jordan (Source: UNESCO Institute of Statistics).

## 50+

Consumers aged 50–59 enjoyed incomes 28% higher than those in other age brackets in 2018, suggesting this is a high-potential target group for education services and products (Source: Euromonitor International).

## NEARLY 3 IN 4

71% of consumers who have had a positive experience with a brand on social media are likely to recommend the brand to their friends and family (Source: Lyfe Marketing).

## MORE THAN 7 IN 10

72% of teens now use Instagram, compared with 51% using Facebook. In 2015 the percentages were almost exactly reversed (Source: Pew Research Center).

## 12.7%

Increase in the number of German students who went abroad for language study in 2018 compared with 2017 (Source: ICEF Monitor).

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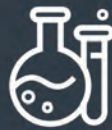
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