12 top emerging markets / Virtual tours and student ambassadors
Edtech and agent aggregators / Boosting career services / AND more

ICEF INSIGHTS

THE FUTURE OF International Student Recruitment

OCTOBER
2022

ApplyBoard

Simplify the Student Application Process

ApplyBoard is on a mission to educate the world by democratizing access to educational opportunities around the globe.

Recruitment Partners
Give your students the best chance for success with access to 1,500+ educational institutions.

Partner Schools
Diversify your campus by attracting qualified students from countries around the world.

Discover Why Our Students Have a 95% Acceptance Rate

400,000+
Students Helped from 125+ Countries

10,000+
Recruitment Partners

$60M+
In Scholarships Secured

125,000+
Programs

1,600+
Partner Schools

1,500+
Team Members Across 25+ Countries

Learn more at applyboard.com | info@applyboard.com | 1.844.972.7759


Learn
Spanish
in Cádiz
@CadizTurismo
www.cadizturismo.com
promocion@cadizturismo.com
CÁDIZ
Diputación de Cádiz

caps-i acep-i

Canadian Association of Public Schools - International | Association canadienne des écoles publiques - International

Avon Maitland District School Board
Stratford, Ontario
+1-519-527-0111 ext.130
yourschoolsincanada@ed.amdsb.ca
www.yourschoolsincanada.com

Come for the Education, Stay for the Experience

- Welcome to Stratford, the festival city, and the home of Justin Bieber.
- Avon Maitland unique Homestay Program.
- Beautiful schools with special ESL support and exceptional academic programs.
- A perfect mix of safe and caring sub-urban and rural communities.

Burnaby School District
Burnaby, Greater Vancouver
+1-604-296-6903
international@burnabyschools.ca
www.studyinburnaby.ca

Academic Success; Canadian Experience

- Located minutes from Vancouver, beaches, mountains
- One of the largest AP programs in Canada – entry to top universities in North America
- IT academies (gaming, cybersecurity)
- Visual and Performing Arts
- Sports academics (soccer, ice hockey, volleyball)
- Elite swimming program

Calgary Catholic School District
Calgary, Alberta
+1-403-500-2469
international@cssd.ab.ca
cssd.ab.ca/international-students

Why should you study with Calgary Catholic?

As the largest Catholic school district in Western Canada, CCSD provides high-quality education with excellent ESL supports in one of the most livable cities in North America.

Located less than an hour from the Canadian Rocky Mountains!

Campbell River School District
Campbell River, British Columbia
+1-250-830-2338
international@sd72.bc.ca
www.studyincampbellriver.ca

- Exceptional Academics
- Outdoor Adventure Program
- High Performance Sports Academies
- Small intimate program with personal support
- ESL classes and support
- Amazing Host Families who want to share their life with you!

Located 40 minutes from Vancouver by plane, Campbell River is an outdoor paradise.

Comox Valley Schools
Comox, British Columbia
+1-250-703-2904
isponline@sd71.bc.ca
www.studyinbritishcolumbia.com

Here For You

- Culturally diverse
- Outstanding student support in a safe, English community
- Short and long term programs
- Supportive and welcoming homestay families
- ESL support at no extra cost
- Fine arts, athletics, outdoor recreation programs
- 30 minute flight from Vancouver

Edmonton Public Schools
Edmonton, Alberta
+1-780-429-8249
isp@epsb.ca
internationalprograms.epsb.ca

Come study with us at Edmonton Public Schools!

Edmonton Public Schools' International Student Program offers students excellent academic programming in Edmonton, Alberta's safe and vibrant capital city. Features include accredited Alberta curriculum, ESL, IB, AP, and university preparation.

Gulf Island School District
Salt Spring Island, British Columbia
+1-250-537-9944 ext. 203
swakefield@sd64.org
www.studyinbc.ca

Salt Spring Island - A safe, supportive, and inclusive community.

Close to two large cities with the tranquil beauty and safety of an island. Salt Spring is a welcoming place where lifelong friendships are made.

Halton Catholic District School Board
Halton Region, Ontario
+1-905-632-6314 ext.153
isp@hcdsb.org
isp.hcdsb.org

Provincial Leader in Academic Achievement

We provide exceptional Catholic education to students throughout the prestigious Halton Region.

- English resources in all schools
- Challenging specialty programs
- Conveniently located close to Toronto

Hamilton–Wentworth District School Board
Hamilton, Ontario
+1-905-527-5092 ext.2235
admissionsoffice@hwdsb.on.ca
www.hwdsb.on.ca/international

Creating new and innovative opportunities for student learning everyday

- 21st Century Learning Strategies
- K - 12
- Strong ESL Support
- IB/AP/Specialized program
- Long term/Short term/Flexible Programs
- Extra-Curricular Activities and Clubs
- 45 minute's drive to Niagara falls

Langley School District
Langley, British Columbia
+1-604-534-7891
isp@sd35.bc.ca
studyinlangley.com

Transforming Students to Global Citizens

Langley School District, located only 45 kilometers east of Vancouver, offers an excellent learning environment with year-long elementary and secondary programs. Full range of academic and elective courses, extra-curricular activities, full ESL support (beginner to advanced), dedicated International Student Coordinator at each secondary school and our own in-house homestay program.

www.caps-i.ca

Study in Canada

Your Assurance of Quality Kindergarten to Grade 12 Education

Lethbridge School Division International Services

Lethbridge, Alberta
https://www.lethsd.ab.ca/departments/superintendent/international-services/international-services2

Succeed With Us!

- Excellence in Academics
- Visual and Performing Arts
- Athletics, IB, French Immersion
- Safe and caring urban community
- Established, supportive homestay families
- ESL support
- Short term, groups, academic programs
- Just over an hour drive to the Rocky Mountains

Mission School District

Mission, British Columbia
+1-604-826-6286 ext.3336
international@mpsd.ca
studyinmission.ca

Student Success Is Our Mission

- Beautiful, safe, family oriented community, 1 hour drive from Vancouver
- Students learn English and realize their academic goals
- We offer University Preparation, ESL,Fine Arts, Applied Skills and Athletics Sports Academies
- Exceptional local Homestay program

Nanaimo-Ladysmith Public Schools

Nanaimo & Ladysmith, British Columbia
+1-250-751-0197
ise@sd68.bc.ca
studyvancouverisland.ca

Love Learning in Nanaimo Ladysmith!

Experience the adventure and beauty of Vancouver Island:

- High quality academic and ELL programs
- Peaceful and friendly seaside communities
- Athletics, Fine Arts, and Skilled Trades programs
- Exciting excursions and activities all year

Newfoundland Public Schools

Newfoundland & Labrador
+1-709-727-2278
Admissions@homeinternationalnl.ca
www.homeinternationalnl.ca

Disocver yourself in Newfoundland, Canada!

- Academic year, one semester or short term programs
- Accredited homestay program
- ESL/Academic support
- Volunteer work placements with resume reference
- Oldest most friendly city in all of Canada

Prince Edward Island International Student Program

Prince Edward Island
+1-902-620-3739
peiisp@gov.pe.ca
www.PrinceEdwardIsland.ca/ISP

Your Pathway – Your future. Choose PEI!

We offer:

- A world-class education in safe and welcoming schools and communities;
- Extracurricular activities that offer something for everyone;
- A wide range of programs provided by dedicated and caring staff;
- The opportunity to learn about and experience Canadian culture, Island style.

Red Deer Catholic School Board

Red Deer, Alberta
+1-403-341-4423
international@rdcrs.ca
www.international.rdcrs.ca

Plan to join us in the heart of beautiful Alberta!

- Live in a safe and caring community
- Attend leading English academic schools
- Experience renowned Canadian Tourist destinations
- Enjoy stay immersed in Alberta culture and friendly home
- Take comfort in top rated International Homestay program administration

Sudbury Catholic District School Board

Sudbury, Ontario
+1-705-673-5620 ext.239
www.cometostudy.ca

Come study in the heart of Canada!

- Two of our secondary schools are consistently ranked among the top 10% in the province
- Students develop English language proficiency quickly among predominantly English-speaking classmates
- Safe and caring community surround by nature!

Upper Grand District School Board

Guelph/Orangeville, Ontario
+1-519-941-6191 ext.225
international.student@ugdsb.on.ca
www.ugdsbisp.com

Upper Grand - Your Future is Here

- One hour from Toronto
- Safe communities; urban or rural homestays
- Dedicated ISP Advisor at each high school
- ESL, IB, AP, French, German, Spanish
- Strong Athletics, Arts and Technology programs
- Secondary & Elementary students
- Excursions

York Catholic District School Board (YCDSB)

York Region, Ontario, Canada
+1-905-713-1211 ext.13634
internationaleducation@ycdsb.ca
https://www.ycdsb.ca

YOUR GATEWAY TO SUCCESS!

The YCDSB is one of the top-performing school boards and offers a variety of program options and supports for our diverse student population.

- Full Year Credit Earning/OSSD
- GAP Year Certificate Programs
- Customized Short Term Stays
- Regional Arts Program
- IB and AP Programs

Waterloo Catholic District Schools

Waterloo Region, Ontario
+1-519-578-3660
info@wcdsb.ca
international.wcdsb.ca

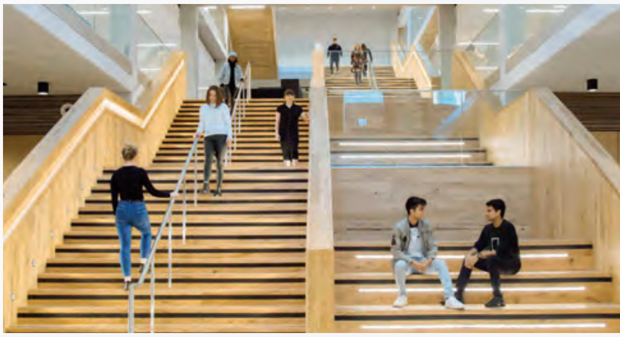
Success For Each, A Place For All

- Excellent Graduate Results
- Comprehensive ESL Support
- School District Custodianship
- Welcoming Homestay Families
- One Hour to Toronto International Airport
- Established College & University Pathways
- Thriving and Safe Community

www.caps-i.ca

UNIVERSITY
COLLEGE
BIRMINGHAM

WHY CHOOSE US?



At University College Birmingham our staff have a wealth of experience in working with, and teaching, international students. As well as academic and welfare support, we have a dedicated international centre to assist you.

We offer a unique range of undergraduate and postgraduate courses which combine theory with a strong emphasis on practical experience and work placements.

The support we offer starts before students arrive in the UK and we strive to ensure that the process of applying and arriving here goes as smoothly as possible:

- Excellent customer service
- Dedicated relationship management
- In country representative
- Student scholarship package
- Transparent admissions process

WHATUNI? STUDENT CHOICE Awards 2022
WINNER
STUDENT SUPPORT

WHATUNI? STUDENT CHOICE Awards 2022
WINNER
UNIVERSITY OF THE YEAR

ACCREDITED BY
WARWICK
THE UNIVERSITY OF WARWICK

CONTACT DETAILS

If you are interested in becoming a UCB representative contact:

international@ucb.ac.uk
Tel: +44 121 232 4458

FIND OUT MORE
Scan this QR code

www.ucb.ac.uk

CONTENTS

MART PRODUCTION / PEXELS

FEATURES

DEPARTMENTS

71

53

PUBLISHER
Craig Riggs

EDITOR
Kiley Turner

PUBLICATION DESIGN
Director: Caren Watkins
Associate: Samantha Edwards
Production: Linda Kincaid

CONTRIBUTOR
Adriana Haytova

COPYEDITING
Donna Dawson

ICEF GmbH
CEO: Markus Badde
Am Hofgarten 9
53113 Bonn
Germany
Tel: +49 228 201 19 0
contact@icef.com
www.icef.com

COVER: DEEPOL/PLAINPICTURE


YOU
BELONG
AT CENTENNIAL
DON'T JUST GET AN EDUCATION.
Attend a school that combines job-ready technical skills with the life skills you need to be ready for anything.
Read stories about our graduates
The model portrayed is a real Centennial College student working in the turbine lab at the Downsview Campus: Bombardier Centre for Aerospace and Aviation.

Give US-bound students the highest level of health insurance coverage with:

ACA approved plans

WWW.WELLAWAY.COM

- ACA approved students plans
- US based claims management administrator
- Multilingual 24/7 Customer service
- Access to the best medical providers networks: United Healthcare and Aetna

WellAway

Keeping You Well, While You're Away.®

WELCOME

I'm pleased to introduce you to the seventh annual issue of *ICEF Insights*, which focuses on opportunities and best practices for international educators and agents heading into 2023 and beyond.

The context for this year's magazine is a world changed not just by the pandemic, but also by the effects of climate change, the war in Ukraine, and precarious economic conditions in many countries. At the same time, demand for study abroad has rebounded and is as strong as ever (see page 20 for a dozen new student markets on our radar).

The ways in which students make decisions about where to study have changed. Their priorities are different, and new marketing techniques and voices are influencing their choices (see our Outreach section, beginning on page 67). More than anything, international students are looking for a solid return on investment – they choose destinations, institutions, and courses based on whether they think these will have a positive impact on their careers.

Many students face affordability concerns: one of their first questions as they consider their options is, "Can I get a scholarship or financial aid?" If not, an institution must demonstrate that it offers great value for money and an array of other compelling advantages.

To reach this new generation of students, educators and agents are rethinking and adapting their recruitment approaches. This magazine is designed to support them and is full of tips for digital marketing, educator-agent partnerships, virtual tours, and peer-to-peer outreach. We explore the balance between the need to scale up marketing – especially when entering new student markets – and the desire for personalised communications.

As always, we are reminded that while new technologies and platforms can provide an amazing boost when recruiting, there is no replacing the value of talented admissions and marketing staff and experienced local agents.

With best wishes,

Markus Badde
CEO, ICEF

MASTER OF ARTS IN

Human Rights and Social Justice

Scan to learn more

ÉduCanada
A world of possibilities
Un monde de possibilités

NEW&NOW

Recruitment channel checklist, emerging markets, artificial intelligence, and more!

Hatirjheel Bridge, Dhaka, Bangladesh

Channel checklist

Boost results with these tips for your website, agent partnerships, digital marketing, events, and student and alumni engagement!

1

Institutional website

1. Incorporate highly visible cues to allow students to ask questions.
2. Include eye-catching social media buttons so students can interact with you.
3. Feature student testimonials and video.
4. Optimise the site for mobile and SEO.
5. Create a landing page just for international students.
6. Make it easy for students to quickly find essential information.
7. Create short, strategic calls to action.

International students want to know ...

"What can I study, and what prerequisites will I need?"

"Is it easy to find a place to live?"

"Can I afford this programme – do you offer scholarships?"

"Can I talk to students or alumni?"

"Will this programme help me to get the job I want?"

"Can someone help me understand the visa process for your country?"

ILLUSTRATIONS: UNDRAW

Agents

1. Check agents' references

↳ Get references from at least two schools the agent has worked with.

↳ Categorise agents into tiers, then set goals and targets for each:
Elite: Top performers with whom you have strong relationships;
Rising: Promising new partners who have sent some students;
Potential: Reputable agents in target regions who have not yet sent students.

2. Check out best practice guides

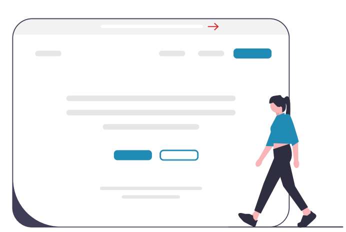
↳ Guidelines for educator-agent partnerships are available from NACAC, AIRC, NAFSA, ALTO, the British Council, and the International Education Association of Australia. These guides set the standard for productive, respectful relationships and can inform well-considered contracts.

3. Adopt a true partnership approach

↳ The best educator-agent arrangements are anchored by transparency, regular communication and meetings, and each party's respect for the other's business goals.

Digital marketing

1. Develop a fun virtual campus tour and consider including a "live" element for a real-time experience.
2. Define key performance indicators and track performance using analytics (e.g., Google Analytics).
3. Create a parent-specific landing page or newsletter.
4. Identify preferred social channels in target markets.
5. Experiment with short videos (15–60 seconds) on Gen Z's favourite channels, YouTube and TikTok (or Douyin in Asia).
6. Commit to answering students' questions within 24–48 hours.
7. Run a campaign or announcement off your homepage banner.
8. Prioritise engagement on social channels (polls are one way of getting students' attention and participation).
9. Expand your database of student email addresses.



TOP 10 SOCIAL MEDIA APPS IN 2022*

Facebook – 2.9 billion	
YouTube – 2.2 billion	
WhatsApp – 2.2 billion	
Instagram – 2 billion	
WeChat** – 1.3 billion	
TikTok – 1 billion	
Sina Weibo** – 573 million	
Telegram – 550 million	
QQ** – 539 million	
Snapchat – 538 million	

**Monthly active users*
***Most users are in China*
Source: Buffer.com

4

Student fairs

1. Announce your upcoming presence at a local student fair on digital channels to maximise attendance.
2. Conduct research on the local student market (for example, if affordability is an issue, highlight scholarships or work opportunities).
3. Consider collaborating with other institutions, rather than competing, to make more of a splash.
4. Create a contest students can enter by providing their email address.

5

Students and alumni

1. Develop a student ambassador programme.
2. Ask current students what motivated them to choose your institution or destination.
3. Ask current students to "take over" your Instagram account for a day to tap into peer-to-peer marketing power.
4. Feature successful alumni in your digital marketing.
5. Highlight cool campus settings – remember to include hashtags! – where students can snap pics.

12 student recruitment hotspots for 2023 (and beyond)

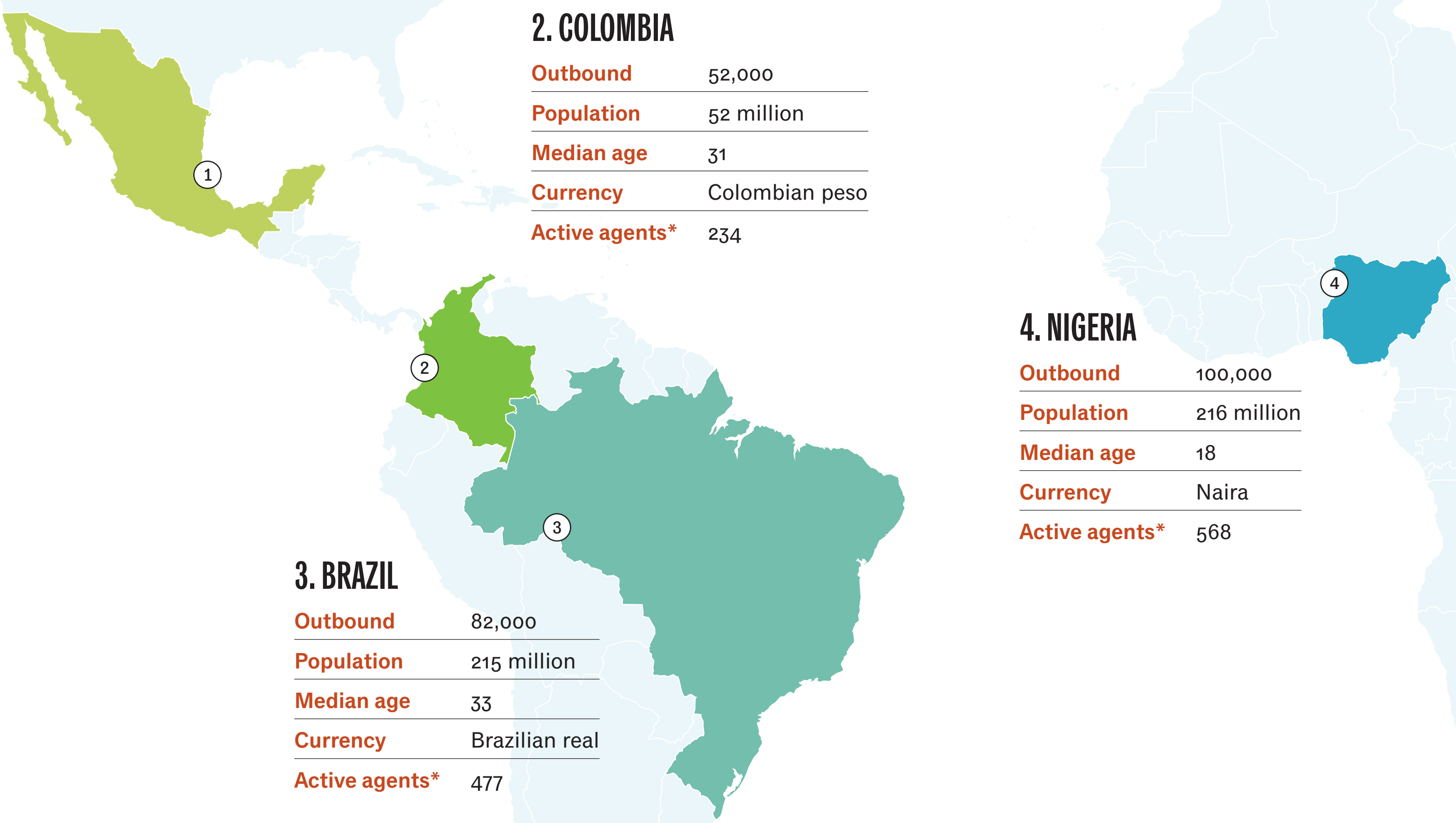
Beyond China and India, which countries will send the most students abroad over the next few years? Here are some of the most likely candidates, based on demographics, market dynamics, and current mobility trends. (*Outbound student numbers are based on UNESCO data for 2019 except for Nigeria, where more recent data from the Carnegie Endowment for Peace was available. Please note: UNESCO reporting often understates outbound numbers given its focus on tertiary enrolments.*)

1. MEXICO

Outbound	35,000
Population	130 million
Median age	29
Currency	Mexican peso
Active agents*	219

2. COLOMBIA

Outbound	52,000
Population	52 million
Median age	31
Currency	Colombian peso
Active agents*	234



3. BRAZIL

Outbound	82,000
Population	215 million
Median age	33
Currency	Brazilian real
Active agents*	477

4. NIGERIA

Outbound	100,000
Population	216 million
Median age	18
Currency	Naira
Active agents*	568

*Active agents = agents in good standing listed in ICEF's database

10. VIETNAM

Outbound	126,000
Population	99 million
Median age	32
Currency	Vietnamese dong
Active agents*	436

5. TURKEY

Outbound	47,000
Population	86 million
Median age	31
Currency	Turkish lira
Active agents*	458

11. PHILIPPINES

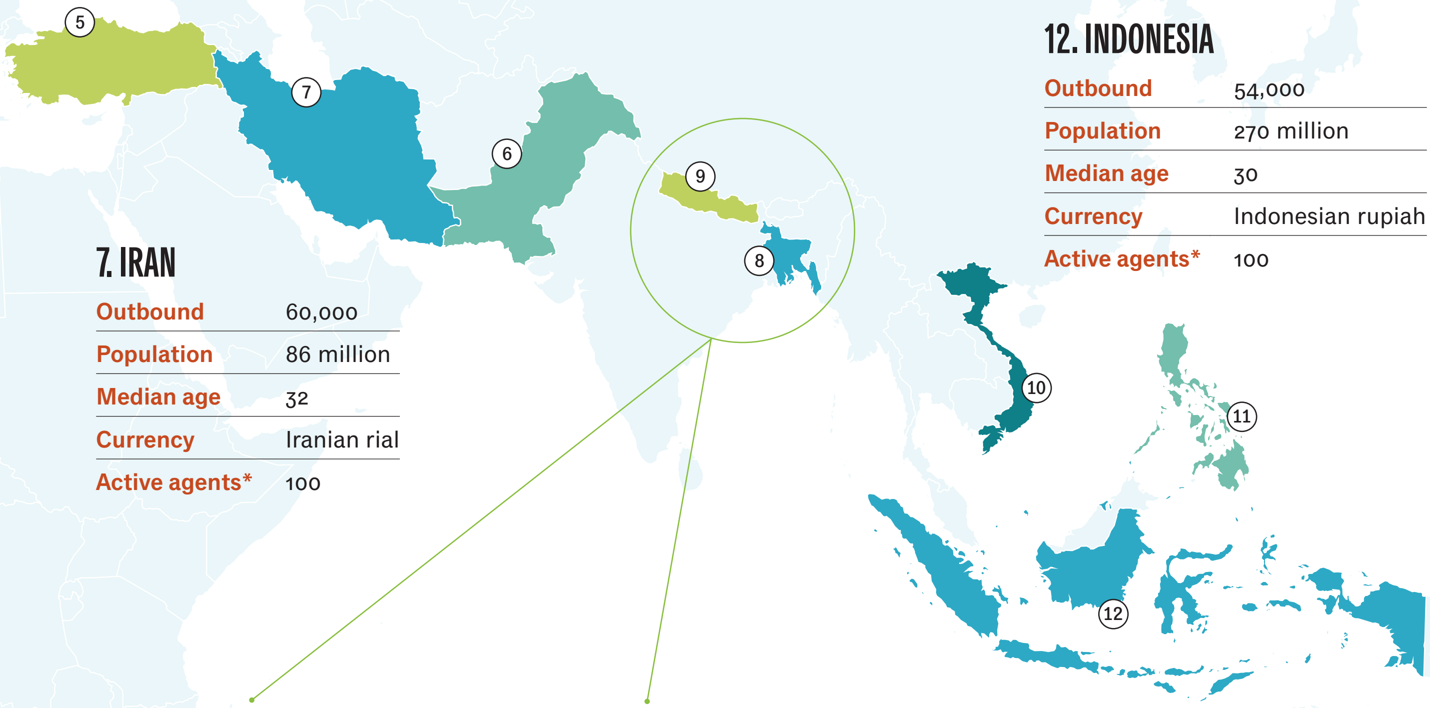
Outbound	23,000
Population	112 million
Median age	25
Currency	Philippine peso
Active agents*	100

6. PAKISTAN

Outbound	60,000
Population	230 million
Median age	23
Currency	Pakistani rupee
Active agents*	619

12. INDONESIA

Outbound	54,000
Population	270 million
Median age	30
Currency	Indonesian rupiah
Active agents*	100



7. IRAN

Outbound	60,000
Population	86 million
Median age	32
Currency	Iranian rial
Active agents*	100

8. BANGLADESH

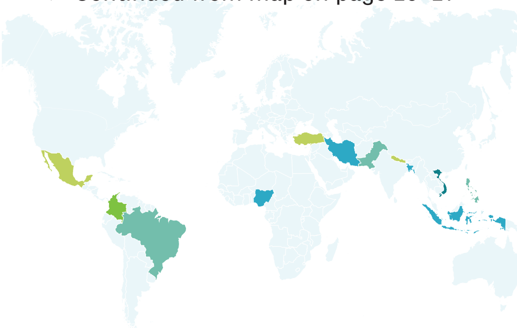
Outbound	45,000
Population	168 million
Median age	28
Currency	Bangladeshi taka
Active agents*	462

9. NEPAL

Outbound	93,000
Population	30 million
Median age	24
Currency	Nepalese rupee
Active agents*	672

More on these markets on page 22–23 ➡

Continued from map on page 20–21



MEXICO

Top 10 market for Canada, France, Germany, Spain, US.

Top student cities: Guadalajara, Mexico City, Monterrey, Querétaro
Tip: Leverage virtual campus tours and highly visual promotions – Mexicans value the culture of a destination.
Fact: 25% of the population is under age 15.

COLOMBIA

Top 10 market for Spain. Increasingly important for Australia, Canada, France.

Top student cities: Bogotá, Cali, Medellín, Pereira
Tip: The Colombian market is price driven – look for ways to offer higher value at a lower cost to students.
Fact: Colombia aims to be Latin America's "most educated country" – tertiary gross enrolment ratio (GER) almost doubled from 28% in 2004 to 55% in 2018.

BRAZIL

Top 10 market for Argentina, Australia, Portugal, US. Increasingly important for Canada, Germany.

Top student cities: Belo Horizonte, Curitiba, Rio de Janeiro, São Paulo
Tip: Partner with experienced agents or popular language schools.
Fact: In 2019/20, 41% of international students in Portuguese universities were Brazilian.

NIGERIA

Top 10 market for Canada, China, Ghana, Malaysia, UK, US.

Top student cities: Abuja, Lagos, Port Harcourt
Tip: Make connections: Nigerian schools want to be partners rather than just providers of students.
Fact: Inflation and the depreciation of the naira are top current issues for students and their families.

TURKEY

Top 10 market for Germany, Italy. Increasingly important for Canada.

Top student cities: Ankara, Gaziantep, Istanbul, Izmir
Tip: Accommodate students' interest in English-language studies as a complement to degree studies.
Fact: The Turkish economy grew 11% in 2021, the highest rate among G20 countries.

IRAN

Top 10 market for Canada, Germany, Italy.

Top student cities: Ahvaz, Mashhad, Shiraz, Tehran
Tip: Highlight immigration opportunities. Iran has more college graduates than its labour market can absorb; up to 25% of Iran's youth are unemployed.
Fact: International institutions must be accredited by the Ministry of Science, Research, and Technology to access the Iranian student market. Agencies can recruit students for a maximum of 3 countries and are regulated by the Iranian Society of Student Recruitment Initiatives (SSRI).

EMMANUEL IKWUEGBU/UNSPLASH; NEDIM VURAL/UNSPLASH

PAKISTAN

Top 10 market for Australia, China, Malaysia, UK. Increasingly important for Canada, US.

Top student cities: Abbottabad, Islamabad, Karachi, Lahore, Sialkot
Tip: Many students are not 100% set on a programme of study – they are open to suggestions and working with a local agent to promote priority programmes is an excellent idea.
Fact: Pakistan has the world's fifth-largest population.

NEPAL

Top 10 market for Australia, Canada, China, Japan, South Korea, Taiwan.

Top student cities: Butwal, Chitwan, Kathmandu, Pokhara
Tip: Show proof of the legitimacy and reputation of your school – reports of scams in various destinations have raised suspicions.
Fact: The Nepalese economy has been shaky for a couple of years – lead with scholarships if possible.

BANGLADESH

Top 10 market for Australia, India, Japan. Increasingly important for Canada, China, Germany, Malaysia.

Top student cities: Chittagong, Dhaka, Khulna, Sylhet
Tip: Visit regularly and/or hold frequent virtual events for stakeholders – competition will be fierce in this important emerging market.
Fact: Effects of global warming are dire in Bangladesh and the country is home to significant youth-led climate-change activism.

VIETNAM

Top 10 market for Australia, Canada, China, Japan, Russia, Singapore, South Korea, US.

Top student cities: Da Nang, Hanoi, Ho Chi Minh City
Tip: K–12 private bilingual schools are important sources of students.
Fact: Economic growth has been one of the fastest in Southeast Asia in recent years, averaging 6.8% between 2016 and 2019.

INDONESIA

Top 10 market for Australia, China, Malaysia, Singapore, Taiwan. Increasingly important for Canada, UK, US.

Top student cities: Bandung, Denpasar, Jakarta, Medan, Semarang, Surabaya
Tip: Be aware of high price sensitivity: an AFS study found that 22% of surveyed Indonesians would choose the least expensive institution in their chosen destination.
Fact: Indonesia's biodiversity is second only to Brazil's.

PHILIPPINES

Top 10 market for Australia, Canada, US.

Top student cities: Cebu, Davao, Manila
Tip: Engage one-on-one with families – study abroad decisions are based on what is good for the whole family, not just the student.
Fact: The Philippines is the second-most populous country in Southeast Asia.

IQRAM-O-DOWLA SHAWON/UNSPLASH; VASI/UNSPLASH

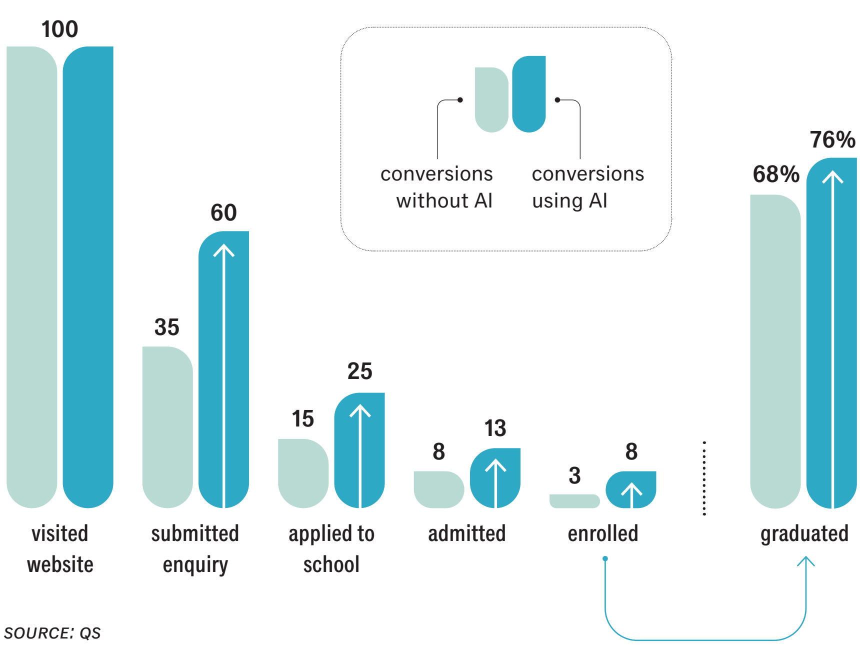
AI-powered admissions

Improve conversions and respond more quickly to students with artificial intelligence

PAVEL DANILYUK/PEXELS

The AI conversion boost

Check out the difference AI technologies can make – assuming 100 students visit your website



SOURCE: QS

If 100 students visit a school's website while researching study abroad destinations, how many will end up enrolling at that school? For many institutions, the answer is about three. New research shows, however, that the conversion rate can jump from 3% to 7–8% when a school incorporates artificial intelligence (AI) – aka machine learning – into its admissions process. That increase can lead to massive revenue gains.

How does it work?

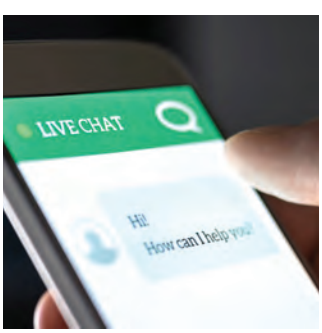
AI crunches vast amounts of data to identify the students most likely to do well in a programme or institution. Ashish Fernando, CEO of iSchoolConnect, says AI not only helps to pinpoint the students most likely to be admitted, but it can also help to predict those who are most likely to secure a study visa, graduate, and even have a successful career.

AI can reduce the load on admissions staff

According to a recent QS whitepaper entitled "Machine learning: How UK universities are improving quality and conversion rates," enquiries and applications from students to UK universities spiked in 2021 by 82% and 179%, respectively. The authors of the paper note that:

"What we are hearing from several institutions in the UK is that they have not been able to keep up with demand and the result is that thousands of enquirers are not receiving replies. Similarly, admissions teams are experiencing significant growth in applications but are not able to process the higher volume of applications they are now receiving in a timely manner, if at all."

Automated communications, such as chatbots, can make the difference between losing and engaging a good prospect with a timely response, especially given that many enquiries will arrive outside of normal campus hours from students around the world.



"At no point when you deploy technology, including AI, will it take the place of a human. Technology is not a replacement; it is an enabler. It can make a process faster, cheaper, and more convenient."

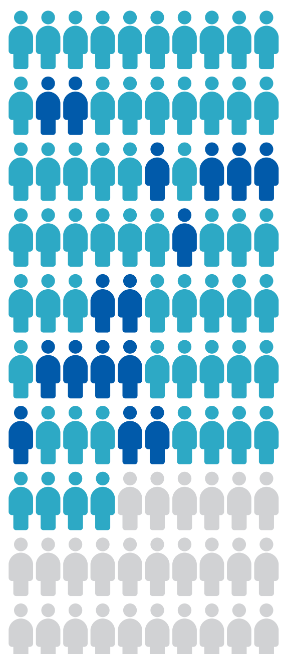
—Ashish Fernando, CEO, iSchoolConnect

TERO VESALAINEN/ISTOCK; NGUYEN DANG HOANG NHU/UNSPLASH

The need for speed

84% of prospective students expect to receive a complete and personal response to an enquiry within a week

18% expect a response within 24 hours



45% of students want to know whether their application has been accepted within **one week**

SOURCE: QS

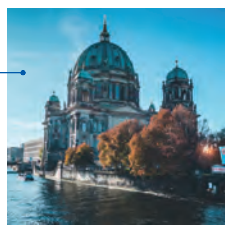
Did You Know?

A QS survey of nearly 50,000 offer-holders found that machine learning helped educators to realise 3% more conversions. For a typical institution with 2,500 international students, this would equate to more than £1.5 million in additional first-year tuition fee income.

Over 30 years of growth and change

ICEF recently celebrated its 30th anniversary, a milestone that has us reflecting back on three decades of growth and world-changing events

1990s



1991

ICEF founded

1995

First ICEF Berlin event

1.7 million international students

527 million international tourist arrivals

16 million Internet users worldwide

1996

First ICEF Asia event (Singapore)

Online travel booking sites Travelocity and Expedia launch

1997

First ICEF Americas event (Miami)

Asian economic crisis

1998

Google founded

2000s

2000

2 million international students

2003

SARS pandemic slows international travel and student mobility

2005

3 million international students

Saudi Arabia's King Abdullah Scholarship Program launches

2006

First ICEF Middle East event (Dubai)

2007

ICEF global agent survey launched

Global economic crisis begins (continuing into 2009)

Apple releases first iPhone

2008

First ICEF ANZA event (Sydney)

First MOOC offered

2009

3.7 million international students

Africa's population reaches 1 billion

ANTHONY REUNGÈRE/UNSPLASH; ISMAIL MERAD/UNSPLASH

2010s

2010

First graduate of ICEF agent training course

2011

4.5 million international students

Smartphone sales outpace desktop computer sales

2012

ICEF Monitor launched

Number of international branch campuses reaches 200

London Statement sets out best practices for education agents

2014

NACAC changes code of conduct to allow use of international agents in US

India begins to outpace China in year-over-year outbound growth

2.3 million language travel students

2015

First edition of *ICEF Insights* magazine

Worldwide K–12 international school enrolment surpasses 4 million

2016

International students contribute US$300 billion to global economy

2017

80% of travel bookings by millennials made online

Chinese enrolments peak in US and begin to decline

2018

First ICEF Africa event (Cape Town)

1.4 billion international tourist arrivals

2019

6 million international students

Canada is fastest-growing host country among top 10 study destinations

2020s

2020

800,000+ Indian students enrolled abroad (pre-pandemic)

WHO reports mysterious pneumonia in Wuhan, China (January)

WHO declares global COVID-19 pandemic (March)

First COVID-19 vaccines approved (December)

ICEF's first virtual events

2021

ICEF's first hybrid event (ICEF Berlin)

COVID-19 vaccines widely approved and distributed as new virus variants emerge

Global language training market projected to reach US$115 billion by 2025, up from US$61 billion in 2019

2022

ICEF Academy launched

International student numbers surge in many destinations

World population almost 8 billion

5 billion people use the Internet daily

2 Chinese universities listed in top 20 of Times Higher Education global rankings (6 in top 100)

8–9 million internationally mobile students – and US$433 billion in international student spending – projected by 2030

CANIE Accord established to "guide bold climate action" in international education

MARTIN JERNBERG/UNSPLASH

Facts & Figures

Stats that provide fascinating insights into our industry right now

Top 10

The 10 countries with the most TikTok users are (in order) the US, Indonesia, Brazil, Russia, Mexico, Vietnam, Thailand, the Philippines, Turkey, and Pakistan. (Source: Statista)

44%

Percentage of TikTok's global user base aged 18–24, compared with 30% for Instagram and 17% for Facebook. (Source: Shopify, Hootsuite)

71%

Seven in ten international students surveyed by QS in early 2022 disagreed with the statement "COVID-19 has made me less interested in studying overseas." (Source: QS)

17%

Fewer than 1 in 5 students say it's important to go to an elite, highly ranked university. By contrast, 72% said they value a university's ability to give them skills they need for the future. (Source: INTO)

7–8%

Percentage of prospective students who decide to enrol in a school when admissions processes are supported by artificial intelligence (AI) – more than double the conversion rate achieved without AI. (Source: iSchoolConnect)

1 hour

55% of conversions (e.g., a purchase or a decision to apply) happen within an hour of a mobile search for a product or service. (Source: FinancesOnline.com)

2

Number of Chinese universities in the top 20 in the 2022 Times Higher Education global rankings, putting China alongside Canada and Switzerland as the only countries outside the US and UK with universities in this highest tier. (Source: THE)

32%

One-third of North American business schools have increased the number of scholarships they provide to MBA applicants; 25% of schools in Europe are doing the same. (Source: QS)

8 in 10

81% of businesses say creating and posting videos has helped them to directly increase sales. (Source: Wyzowl)

$117 billion

The amount spent globally on online degrees and micro-credentials is expected to grow 17% annually from US$45B in 2019 to US$117B in 2025. (Source: HolonIQ)

8 seconds

The average human attention span fell from 12 seconds in 2000 to just 8 seconds in 2017, suggesting that marketers have a very short window in which to capture their audience's interest. (Source: Microsoft)

79%

Percentage of Gen Z respondents across 18 countries saying they care more now than they did before the pandemic whether brands prioritise sustainable practices. (Source: Global Web Index)

45,000

Over 45,000 students in the US were enrolled in online MBA programmes in 2020/21, more than the 43,700 attending full-time residential programmes. (Source: Association to Advance Collegiate Schools of Business)

75%

Three-quarters of students in 18 countries who studied virtually during the pandemic said they would do so again. (Source: UNESCO International Institute for Higher Education in Latin America and the Caribbean)

ELLAGRIN

haileyburyrendall.com.au

Boarding in Australia

More than classrooms and computers.

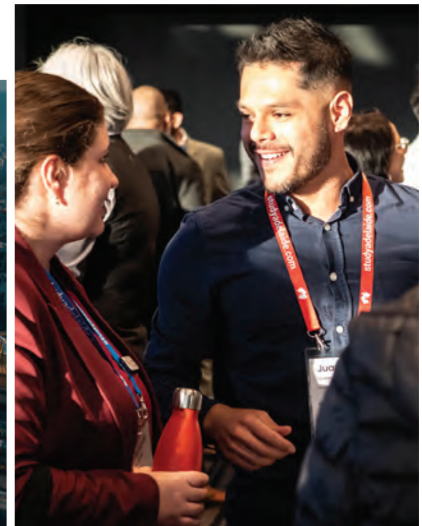
At Haileybury Rendall School in Darwin, outside the box thinking comes from being, quite literally, outside the box. In addition to the invaluable lessons they learn in class, our boarding students are given all kinds of opportunities to explore – both the world around them and who they are as young people. Time spent both learning and living here means time to build skills of friendship, teamwork, resilience, leadership and decision-making. From here, they're encouraged to take their path anywhere.

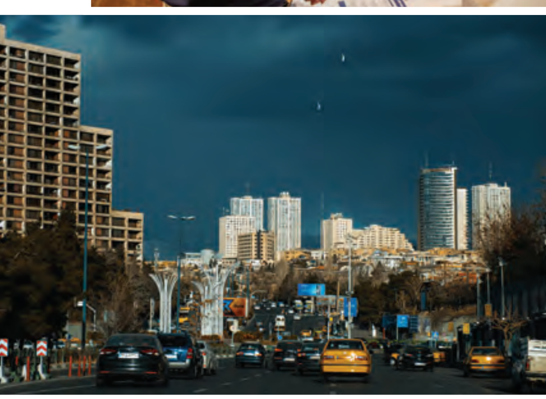
Please contact Haileybury Rendall School Principal, Mr Andrew McGregor to learn more about our International Boarding Scholarship via email international@haileybury.vic.edu.au.

2022 AUSTRALIAN EDUCATION AWARDS WINNER

BOARDING SCHOOL OF THE YEAR

HAILEYBURY
RENDALL SCHOOL





LANDSCAPE PHOTOS (CLOCKWISE) RAIMOND KLAVINS/UNSPLASH; SAJAD NORI/UNSPLASH; SVETLANA GUMEROVA/UNSPLASH

Recruiting international students has, in some ways, never been more challenging. There is intense competition from institutions in more destinations than in the past, as well as from lower-cost alternatives such as MOOCs and other digital courses. Prospective students now expect near-immediate responses to their questions; assurances that programmes will lead directly to well-paying jobs; and in many cases, scholarships or financial aid. Diversification, once a nice idea, is now an urgent requirement as Chinese outbound slows and as new world crises threaten to destabilise international student mobility. Yet despite these challenges, schools and universities also have a far more powerful recruitment toolkit available to them than before the pandemic. In the special feature package that follows, we look inside this toolkit – especially as it relates to diversification goals. Agent partnerships, in-country offices in emerging markets, edtech, and virtual tours are helping educators to connect with students in a wide range of destinations, at the right time, and on the most influential channels.

THE new normal

Risk management, expanded agent partnerships, and new investments in digital outreach are just some of the defining aspects of recruiting today

The new **PLAYBOOK** for international recruitment

The pandemic was a shock, in every sense, to the status quo, and it caused a historic disruption in global patterns of student mobility. In the wake of COVID-19, many institutions, agents, and other stakeholders in our industry are re-evaluating how they recruit international students.

They are taking advantage of lessons learned, and new practices adopted, over the past couple of years. Stakeholders are also aware that other events are affecting student flows, from war and geopolitical tensions to inflationary pressures on families' finances. And they realise that the factors influencing students' decision-making about study abroad are fundamentally different to what they were before the pandemic.

Here's a look at the new shape of international student recruitment in the 2020s.

The race to diversify

Whatever else it was, the pandemic was a wake-up call for educators that hadn't yet built comprehensive risk management strategies into their recruiting approach. If COVID-19 can happen, anything can happen. A country could be devastated by climate change (e.g., Pakistan and Bangladesh this year). It could be rocked by a currency devaluation or other economic tremors. Or it could close its borders suddenly and indefinitely. The list goes on and on.


KEIRA BURTON/PEXELS

The new status quo is living with greater uncertainty – expecting the unexpected. Risk management is at the top of the list of institutional priorities now. Educators are, for example:

- Entering new student markets or intensifying their presence in existing source markets outside of China and India (see our related feature on pages 42–49);
- Developing more online courses and content delivery capabilities;
- Investing in offshore campuses or joint programmes with foreign partners.

The goals are to stretch enrolments further across nationalities and beyond in-person classes, and to enrol international students who may be content to study remotely in their home country.

Greater reliance on agents

Educators that had strong agent partnerships in place during the worst months of the pandemic benefitted on several fronts:

- When border restrictions prevented travel overseas, they had partners in local markets who could keep working with students whose plans had been upended by the crisis;
- They were able to maintain a brand presence in key markets beyond digital channels;
- They gained a competitive advantage through up-to-the-minute market intelligence from agents.

As a result, the perceived value of agents rose across our industry, and – especially given the rush to diversify source markets – the use of agents is increasing.

In tandem with rising interest in the agent channel, there has also been a push to develop best practice guidelines aimed at helping educators and agents work optimally together (see page 54). The guidelines emphasise mutual responsibility and respect and provide a good basis for successful relationships.

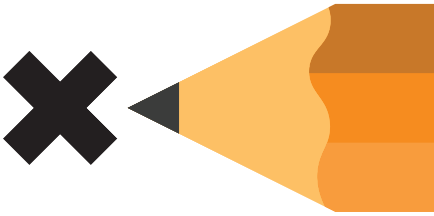
For a growing number of institutions, professional, high-performing agents are now powerful partners in a multichannel recruitment strategy. Jun Wang, assistant provost for strategic initiatives and international recruitment, University of California, Riverside, explained in a *Chronicle of Higher Education* webinar in early 2022 that:

> "Before, we were strictly recruiting from China or India (a little bit), but now we're recruiting from 42 countries. We started thinking – what if we can't travel, what if there is no virtual access, and to [manage this much recruitment] at 3 a.m. every day [because of time zones] ... it's not healthy for us. So, we have started to pay in-country representatives. They're in the same time zone [as students] and they know the language and culture so much better – they can build long-lasting connections."

A bigger role for in-country offices

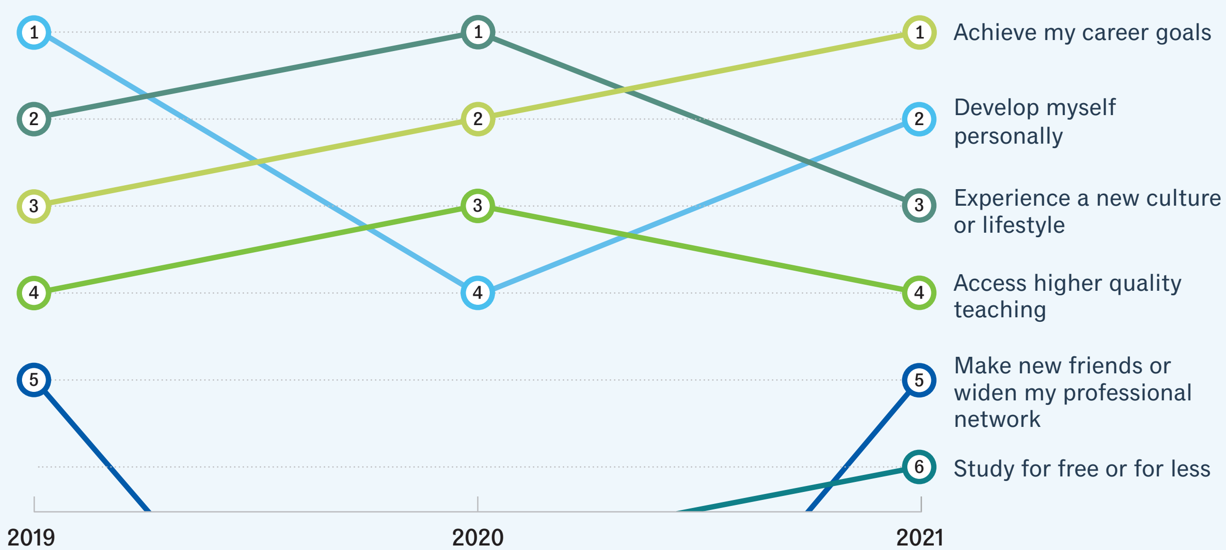
More institutions are setting up in-country offices in key sending markets to establish a stronger local presence and sustained promotion throughout the year. These may be standalone facilities for individual institutions or shared offices operated by consortia or by third-party providers, such as Illume Student Advisory Services, Grok Global, EduConnect International, and INTO University Partnerships.

In-country office representatives can help institutions engage with agents and schools, and develop a more robust and continuous presence in-market, including at student- or parent-facing events. In the



In the simplest terms, in-country reps can be thought of as an overseas extension of a university's international marketing team

Prospective students' top motivations to study abroad



SOURCE: EDUCATIONS.COM

simplest terms, in-country reps can be thought of as an overseas extension of a university's international marketing team.

Having in-country offices is more affordable than sending institutional staff abroad several times a year. What's more, even if a university staff member could travel, say, four weeks a year to one source market, that would leave another 48 weeks when they weren't in that market to connect with parents, schools, agents, and students.

Particularly for the many institutions that have increased the number of international markets they're working in, using in-country representatives makes sense. Otherwise, managing recruitment in many countries and time zones could be exhausting, if not impossible.

New messaging

There's no doubt about it: the new generation of students is pragmatic, astute, sceptical, and understandably anxious about the future. They have seen their lives interrupted, their mental health compromised, and their ability to experience a full, vibrant, in-person social life and education taken away for months – or longer. Some have seen their families' finances fall apart or their countries' economies go into free-fall. Because they lost control of so much during the pandemic, today's students are highly interested in regaining as much control as possible.

They gather "proof" on which to base their study abroad decisions like no students before them. They want to talk to current students, alumni, and faculty. They look for evidence on institutional websites that graduating from a programme will lead to a successful job – not in months or years, but right away. They search endlessly on social media such as TikTok for student influencers to assure them they will fit in on campus.

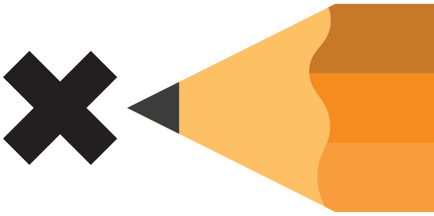
Students are also seeing institutions competing harder for their enrolments. This is true not just in China and India, but in the emerging markets educators are flocking to in the push for diversification. Many students need affordable options and will only consider universities offering scholarships – and more and more institutions are increasing the number of scholarships they provide, knowing it may be the competitive edge they need.

All these changes are resulting in new marketing messaging, investments, channels, and strategies. A well-designed institutional website that quickly, persuasively answers students' questions is essential. Some institutions are using chatbots to respond almost instantly to students – knowing that students now expect near-immediate answers to their questions. Student ambassador programmes are now common, and paid student social media ambassadors are a rising trend, as institutions strive to deliver personalised, authentic messaging.

Suffice to say, achieving a balance between efficiency and personalisation in communications to students is a challenge many institutions now face.

All things digital

We all went digital in the pandemic – what else could we do? For schools and universities, going digital in marketing was one of the few ways to keep communicating with students. For students, Internet research and social media interactions were a necessary way to decide whether an institution was the right fit. Students attended online rather than in-person events put on by schools, and they "walked" around campus via virtual tours.



Students today gather "proof" on which to base their study abroad decisions like no students before them

Those habits are now ingrained. There is no debate about how important digital marketing now is in recruitment; everyone is invested in it. But questions remain: How can you optimise this channel? Is your virtual tour rich enough (see page 68)? Are you letting students tell enough of your brand story? Are you only broadcasting messages – or are you taking advantage of the opportunity to interact with students? If you are recruiting in Brazil, for example, do you have Portuguese-language information on the website, or Brazilian student ambassadors?

Digital marketing became a must in the pandemic. Going forward, it will be a given.

Recruiting at scale

A range of educational technologies are now available to help institutions reach as many students as possible without overtaxing admissions and marketing staff. As we discuss in the Outreach article on page 71, edtech has its place, given how powerful the technologies are. But they are best used to complement the talent and personalised touch of experienced employees. For example, chatbots can help to respond quickly to students – but students would be annoyed if they couldn't speak directly to admissions staff once their questions became more complex or personal.

Multidimensional marketing

You may notice one overarching theme in this article: recruiting today is about establishing a network of complementary channels – and partners. The challenge of diversification is great enough that very few schools or universities can manage international recruiting using only their own staff and resources.

The push for diversification is driving the rise in the use of agents and in-country offices. It's also prompting more and more schools to rely on student ambassadors from key markets to speak to prospective students at home – in their own language, on the social channels their peers are on.

With more on their plates than ever, institutional staff are using AI chatbots to help manage massive volumes of enquiries from around the world. Staff are turning to virtual tour companies and to experienced web designers to create the sophisticated digital branding that students now expect.

Trusted partnerships have always been valuable, but never more so than now.

GEORGE MILTON/PEXELS

Charms
EDUCATION & IMMIGRATION

Your Trusted Partner For Study Abroad

We have a long, rich experience that helps our clients

- Choosing the best institutes
- Deciding on the best courses
- Finding the most suitable on-board facilities
- Providing professional career counseling & guidance

- Providing Comprehensive Education Services From 18+ Years
- Partner of Over 1000+ Foreign Institutions
- Successfully Enrolled 100,000+ International Students

What we offer - Students & Partners

Education Consulting

Assisting students to find the right course and the right institute.

Visa Guidance

Assist all the way from visa application to post visa services.

Education Fair

Organising Road Shows & Events Globally

English Training & Testing

IELTS, PTE, CAEL / CELPIP online / offline

Travel Support

Air Ticketing, International Insurance, International Sim Card & Forex Cards

Strategic Marketing Advisory

Launching of New Programs & Cohorts as per market requirement

Learn more at **www.charms.co.in** | **info@charms.co.in** | **+1 604 628 0585**

THE PUSH FOR DIVERSIFICATION

Educators have been talking about diversifying international enrolments for years. That elusive goal is now coming into sharper focus for many.

LEO ACADIA / THEISPOT

The Australian Strategy for International Education (2020–2030) report succinctly articulates the issue facing educators everywhere: "The COVID-19 pandemic demonstrated that dependence on a small number of [student] markets is not sustainable."

This reality has fundamentally changed the international education landscape. The past couple of years have been chock-full of webinars and conferences devoted to questions like these:

- How do we reduce our reliance on two or three key sending markets?
- How can we capitalise on our recent investments in online, remote, and hybrid course delivery so we can depend less on in-person enrolments and gain new revenue streams?
- How can we enrol students across a wider range of programmes, especially programmes that tie into the specific jobs and skills our economy needs to thrive?

Those themes reflect a new understanding of what a diversification strategy looks like today. For many educators, diversity is becoming more multi-layered and is no longer just about expanding the mix of nationalities in a student body.

A flattening Chinese outbound market

For years, experts have predicted that the flow of Chinese students would weaken through the 2020s because of many factors, including increased capacity and quality in China's own higher education system. Somehow, this diminished flow still feels like a shock now that it has really taken shape.

Rising geopolitical tensions between China and the West may have accelerated the trend. The Chinese government has become increasingly intent on carving out a sphere of influence to rival North American–European ties. Its policies have shifted towards a goal of keeping more students at home, rather than having them leave for the West, to study and work.

The four major English-speaking destinations are feeling the impact:

- The UK saw 5% fewer Chinese commencements in 2020/21;
- Also in 2020/21, Chinese enrolments in the US declined by 15%;
- From 2019 to 2021, the proportion of Chinese students in Canada's international student population fell to 17% from 22%;
- The proportion of visas given to Chinese students for programmes in Australia in 2021 was 30% of the total, down from 35% in 2019.

It's quite apparent that while China will continue to be a top sending market and a priority for recruiters the world over, it will no longer be the major driver of global mobility.

India is the new growth driver

Like China, India will remain a major (and growing) student market for the long term. Strong current demand from students in India is certainly helping to mitigate the trend of flattening or declining Chinese enrolments. Indian students composed 35% of Canada's total international student population in 2021, stable since 2019, while in the UK, Indian enrolments made up a far greater share in 2021 (19%) than in 2019 (10%). Indian students remain the second-most dominant international segment in Australia and the US as well.

But educators are also aware that destabilising events can affect any outbound market. In 2012, the Indian rupee lost one-fifth of its value, depressing Indian student mobility for some time. In 2020, the US dollar hit a 20-year high, which is making it more costly for students in many countries – including India – to study there.

Share of total foreign enrolment held by top five sending countries for each destination

Australia		Canada		UK		US	
2019	2021	2019	2021	2019/20	2020/21	2019/20	2020/21
70%	62%	67%	62%	45%	47%	63%	63%

GABRIELLE HENDERSON/UNSPLASH

China's policies have shifted towards a goal of keeping more students at home, rather than having them leave for the West, to study and work

How diversified are leading destinations?

The table above shows that the UK is the least reliant of the four destinations on its top markets – i.e., its foreign student population is more dispersed across nationalities. However, Australia and Canada have made more progress lately in diversifying beyond their top five source markets.

Further, in the tables on pages 46 and 47, we see that the UK is becoming much more reliant on Chinese and Indian enrolments. Chinese and Indian students represented 51% of the total international student population in 2021 – a big jump from 36% in 2019.

Shifting markets

A look at changes over the past two years to the top sending countries for educators in Australia, Canada, the UK, and the US

Australia 2019	Australia 2021	Canada 2019	Canada 2021	UK 2019/20	UK 2020/21
Total 617,465	**Total 570,626**	**Total 642,480**	**Total 621,565**	**Total 556,625**	**Total 605,130**
China: 211,975 *34% of total*	**China:** 170,741 *30% of total*	**India:** 219,855 *34% of total*	**India:** 217,410 *35% of total*	**China:** 141,870 *25% of total*	**China:** 143,820 *32% of total*
India: 115,082 *19% of total*	**India:** 99,650 *17% of total*	**China:** 141,400 *22% of total*	**China:** 105,265 *17% of total*	**India:** 55,465 *10% of total*	**India:** 84,445 *19% of total*
Nepal: 53,526	**Nepal:** 45,497	**S. Korea:** 24,100	**France:** 26,630	**US:** 20,770	**Nigeria:** 21,305
Brazil: 27,339	**Vietnam:** 20,732	**France:** 23,865	**Iran:** 16,900	**Hong Kong:** 16,370	**US:** 19,220
Vietnam: 26,003	**Malaysia:** 15,569	**Vietnam:** 21,490	**Vietnam:** 16,285	**Italy:** 14,505	**Hong Kong:** 16,665
Malaysia: 24,314	**Indonesia:** 15,527	**US:** 14,850	**S. Korea:** 15,805	**France:** 14,015	**Italy:** 14,605
S. Korea: 21,144	**Brazil:** 14,646	**Iran:** 14,615	**Philippines:** 15,545	**Nigeria:** 13,020	**France:** 14,090
Colombia: 20,715	**Colombia:** 14,466	**Brazil:** 14,495	**US:** 14,325	**Spain:** 11,270	**Pakistan:** 12,975
Indonesia: 18,057	**Philippines:** 14,399	**Nigeria:** 11,890	**Nigeria:** 13,745	**Romania:** 10,830	**Romania:** 12,860
Thailand: 17,475	**S. Korea:** 13,868	**Mexico:** 8,765	**Mexico:** 11,550	**Pakistan:** 7,830	**Spain:** 12,290

Sources: Department of Education, Skills and Employment (Australia); Immigration, Refugees and Citizenship Canada; Institute of International Education (US); Higher Education Statistics Agency (UK)

US

2019/20 Total 1,075,496	2020/21 Total 914,095
China: 372,532 *35% of total*	China: 317,299 *35% of total*
India: 193,124 *18% of total*	India: 167,582 *18% of total*
S. Korea: 49,809	S. Korea: 39,491
Saudi Arabia: 30,957	Canada: 25,143
Canada: 25,992	Saudi Arabia: 21,933
Vietnam: 23,777	Vietnam: 21,631
Taiwan: 23,724	Taiwan: 19,673
Japan: 17,554	Brazil: 14,000
Brazil: 16,671	Mexico: 12,986
Mexico: 14,348	Nigeria: 12,860

Which new markets are on the radar?

In part because of where they are geographically, educators – sometimes with government partners – in each of the four destinations are prioritising different new student markets.

Australia

TARGET MARKETS:
Austrade market development activities in 2022 indicate that the following markets are priorities: Argentina, Brazil, Chile, Colombia, India, Malaysia, Mexico, Nepal, Peru, the Philippines, and Thailand.

HOW IS IT GOING?
So far in 2022, there has been a year-over-year uptick in commencements from India, Nepal, Pakistan, the Philippines, and Thailand.

Canada

TARGET MARKETS:
Brazil, Colombia, France, Indonesia, Mexico, Morocco, the Philippines, Thailand, Turkey, Ukraine, Vietnam

HOW IS IT GOING?
Canadian immigration data shows that all of these markets except Vietnam sent more students in 2021 than in 2020. Growth is particularly strong from France, Mexico, Morocco, and the Philippines. Outside of the government's stated priorities for market development, Hong Kong, Nepal, and Sri Lanka are also growing fast.

UK

TARGET MARKETS:
Brazil, China, Europe, Hong Kong, India, Indonesia, Mexico, Nigeria, Pakistan, Saudi Arabia, Vietnam

HOW IS IT GOING?
Unlike the other destination countries, the UK held onto its Chinese enrolments in 2021. India, Nigeria, and Pakistan are also sending many more students. Universities and Colleges Admissions Service cautions, however, that 2021 applications data shows that "just over half of all international applications for 2021 came from only seven countries ... the UK remains heavily dependent on Chinese applicants."

US

TARGET MARKETS:
Mexico, Nigeria, Europe*

HOW IS IT GOING?
In 2021, the number of Nigerian and Mexican students on M-1 or F-1 visas increased by 12% and 13%, respectively, over 2020, and numbers from France, Germany, Italy, Spain, and the UK all increased as well.

**The US does not have an international education strategy or other government-based indications of which markets are priorities, but SEVIS visa numbers for 2021 show that the above regions sent significantly more students last year, helping to spur US educators' recovery from pandemic enrolment losses.*

Reaching beyond national borders

During the pandemic, the notion of diversification for schools and universities expanded a great deal beyond its previous parameters. Diversity used to be thought of mainly in terms of broadening the number of nationalities on campus. Now, it also includes approaches to deliver programmes to international students at least partially off-campus.

This expansion of the definition of diversification is due to a couple of related factors that became clear at the height of COVID-19 travel restrictions:

1. Schools and universities that could deliver quality online learning to international students abroad – or already had branch campuses or joint programmes in other countries – were better able to withstand the shock of closed borders than those without these capabilities.
2. New international student segments emerged. One example is students willing to begin studies online if they can eventually travel to a campus. Another is students willing to enrol in a totally online programme if they receive incentives to do so, such as lower tuition or post-study work rights in a destination country.

Both these developments highlighted the limitations – for enrolments and potential revenue – of the traditional model in which international students fly to overseas destinations to receive in-person instruction at a foreign institution.

The international perspective on these trends came through in a 2021 Canadian Bureau of International Education webinar that made it clear that institutions are thinking beyond traditional capacity limits such as available in-person classroom space or housing.

As George Brown College's Rick Huijbregts explained during the webinar session, "We are bigger than just the physical space we have ... we are thinking about how we can deliver the George Brown experience beyond [the campus], even outside of Canada."

Quite simply, the pandemic massively expanded the potential market of international students around the world. It revealed just how many students would opt for quality online or hybrid (aka blended) learning if it delivered a credential awarded by a foreign institution and if it were offered at the right price with attractive incentives, such as lower tuition.

Life after STEM

International enrolments have always been heavily concentrated in a few key subject areas, especially business, technology, engineering, and other applied sciences. For some institutions, this focus can lead to capacity constraints in those programmes while spaces remain available in other fields of study. Aside from addressing these capacity imbalances, there is great value in getting international students and partners interested in a less concentrated, less limited way than is sometimes done.

With all that in mind, educators are now giving more attention to boosting international enrolments outside of business and STEM programmes. A mid-2022 survey conducted by ICEF suggests agents have a role to play in this process.

Agent respondents from 11 key sending markets said at least half of the students they counsel are interested in advice and recommendations about programme options. Agents emphasised the need for institutions to work closely with them to explain which programmes have extra capacity for international students, why students should be interested, and what jobs the programmes can lead to. If a programme is less expensive, for example, or has internships attached to it, strong industry links, or scholarships available, agents need to be able to communicate these increasingly compelling features.

This all suggests that additional targeting of students by programme area may be a strategy that is readily available to most educators. Diversifying enrolments across programmes is another aspect of risk management.

AAYUSH KHATOR/UNSPLASH

Open to alternatives

An IDP Connect survey conducted in 2021 among 3,650 prospective students from 55 countries found that ...

81% of students wanted a traditional study abroad experience: on campus, in a new culture, far away from home.

But ...

18% would consider starting online in their home country then travelling overseas to a campus to complete their programme.

10% would consider fully online study.

The importance of incentives

One-third (33%) of students willing to consider studying entirely online – and 43% of students considering an online start to studies followed by on-campus instruction – said they were more likely to consider these options if they were offered lower tuition fees.

Educators everywhere are now tasked with making smart decisions about how much of a programme will be delivered in-person, online, or as a blended model

New partnerships helping to build better banking services for students

Canada, argues noted journalist Doug Saunders, is facing a "crisis of underpopulation." For much of its history, the country has been a net exporter of people and now, with an ageing citizenry, it is clearer than ever that the future and shape of Canada's population will be determined by its immigration policies.

For its part, the Canadian government has set an aggressive strategy that has seen immigration targets raised to record levels. This was followed in September 2022 by the introduction of new measures that will make it easier for temporary visitors, including international students, to transition to permanent residency.

"International students are not just important to the education system in Canada," says Amit Brahme, senior director for the Newcomer and Cultural Client Segment at Royal Bank of Canada (RBC). "They are also bringing skills and talent that can help the entire country."

This accounts in part for the bank's long history of supporting new Canadians, and why it is now creating new partnerships that offer additional benefits for incoming students.

These include a recently announced agreement with ICICI Bank – one of the largest banks in India with a network of more than 5,000 branches – as well as a new collaboration with leading recruitment platform ApplyBoard.

The latter has allowed RBC and ApplyBoard to integrate a number of services for incoming students. Those applying to study in Canada via the platform can now also apply to open an RBC Guaranteed Investment Certificate (GIC) account at the same time – which can then be used to fulfil the Proof of Financial Support requirement for a Canadian study permit application. Mr Brahme explains that through its ApplyProof verification service, ApplyBoard "authenticates the student's letter of acceptance as well as the GIC certificate. Everything is in one place for the student's use during the study permit application process and also to present to immigration officials when the student arrives in Canada."

On arrival, students can also visit an RBC branch, including a number of campus-based branches, to access additional banking services, including bank accounts, credit cards, and safety deposit boxes. They will also find a variety of additional support services through the bank, including financial advice events (virtual and in-person) along with specialised resources for newcomers like Prepped, an app designed to help students with their job search, and Arrive, a website that provides helpful tools and information across life, career, and finances in Canada. Those targeted resources, along with the in-branch supports for new arrivals, reflect a larger idea of the role that a bank can play in helping students to transition to life, study, and work in Canada. "When students come to the country, they need services that go beyond banking," adds Mr Brahme. "Especially with respect to career preparation, resume writing, networking, and job search skills. We are here to help with that."

NAASSOM-AZEVEDO / UNSPLASH

BOOST YOUR COVERAGE WITH studyinsured™

Partner with more than a provider.

StudyInsured™ is committed to taking care of students **and** helping you grow your business. Ask how StudyInsured™ **customized insurance solutions** help your business save money, effort, and administrative time.

StudyInsured™ makes switching providers seamless.
Save time and money—get started with StudyInsured™ today!

- 24/7 MEDICAL ASSISTANCE IN OVER 100 LANGUAGES
- STAY HEALTHY AT SCHOOL PROGRAM
- DEDICATED ACCOUNT MANAGER AND CUSTOMIZED WEBSITE
- GLOBAL EDUCATION REINVESTMENT FUND
- EMERGENCY MEDICAL EVACUATION AND REPATRIATION
- TAILORED INBOUND AND OUTBOUND INSURANCE SOLUTIONS

studyinsured™
GLOBAL STUDENTS. GLOBAL COVERAGE.

TOLL-FREE 1.855.649.4182
WORLDWIDE +1.416.649.4182
icef@studyinsured.com

TRENDS

Agent aggregators, students’ top priorities, and reimagined career services

KINDEL MEDIA/PEXELS

Building to Scale

How are agent aggregators changing the dynamics of international student recruitment?

The Internet is a great example of what economists refer to as the "network effect" – a phenomenon in which the value of a product or service depends on how many people use or participate in it. As more people join, the product or service becomes more helpful or efficient.

The network effect is the driving force behind a growing number of online platforms used for international student recruitment. Sometimes referred to as "agent aggregators," these companies connect large numbers of educators, typically across a variety of study destinations, with an even larger pool of education agents.

Institutions and agents access an online platform boasting targeted services and features. The goal for institutions is to recruit large numbers of students more efficiently. Business models vary, but typically the recruitment platform retains a share of a referral commission from an institution or school, with the balance passed on to the agent.

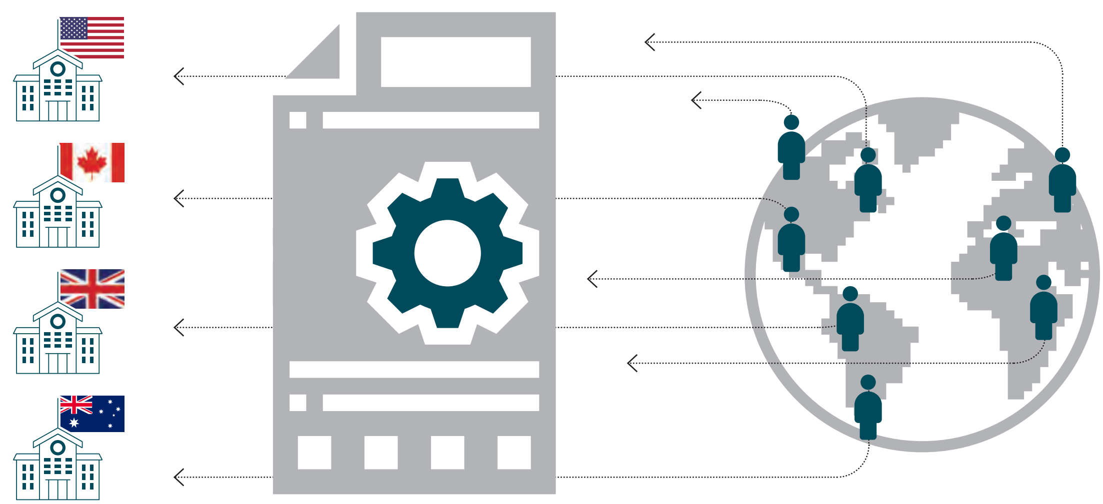
There are differences between companies in this sector, despite their common purpose. Some rely more on artificial intelligence, for example, while others operate as exclusive recruitment partners for their institution clients.

High-profile examples of such recruitment platforms include the venture-capital-backed ApplyBoard and Adventus.io. Established university pathway providers, such as Shorelight or INTO University Partnerships, can also be seen to play an aggregator role; newer operators are entering the space every year, such as Edvoy, MSM's Abcodo, and Leverage Edu's UniValley platforms.

How fast are they growing?

The idea of the agent network is hardly new, and sub-agent relationships between larger, established agencies and smaller, geographically distributed offices have been common for years. What is different here is the scale at which some of these newer tech-enabled platforms operate.

As you can see in the chart on page 56, the network effect is in full bloom for platforms such as ApplyBoard and Adventus.io, which have both dramatically built up their respective agent networks over the past two years.



For the aggregator model to work, the platform must attract a critical mass of both institutions and agents.

These growth trends reflect an important point: for the aggregator model to work, the platform must attract a critical mass of both institutions and agents. Without a sufficient variety and range of partner-educators, the platform cannot recruit and retain agents. Without an impressive agent network, the platform cannot engage enough institutions or meet their recruitment goals.

Supporting the network

With networks this large, it is natural to wonder about the degree of quality assurance and oversight these platforms can provide. Educator surveys exploring the subject have certainly revealed concerns about the transparency and quality of agents and student-applicants.

For their part, executives for recruitment platforms report that they rely on a range of quality assurance measures, such as using structured onboarding processes to register and vet new agents. "We take recruitment partner vetting and training extremely seriously," says Meti Basiri, co-founder of ApplyBoard.

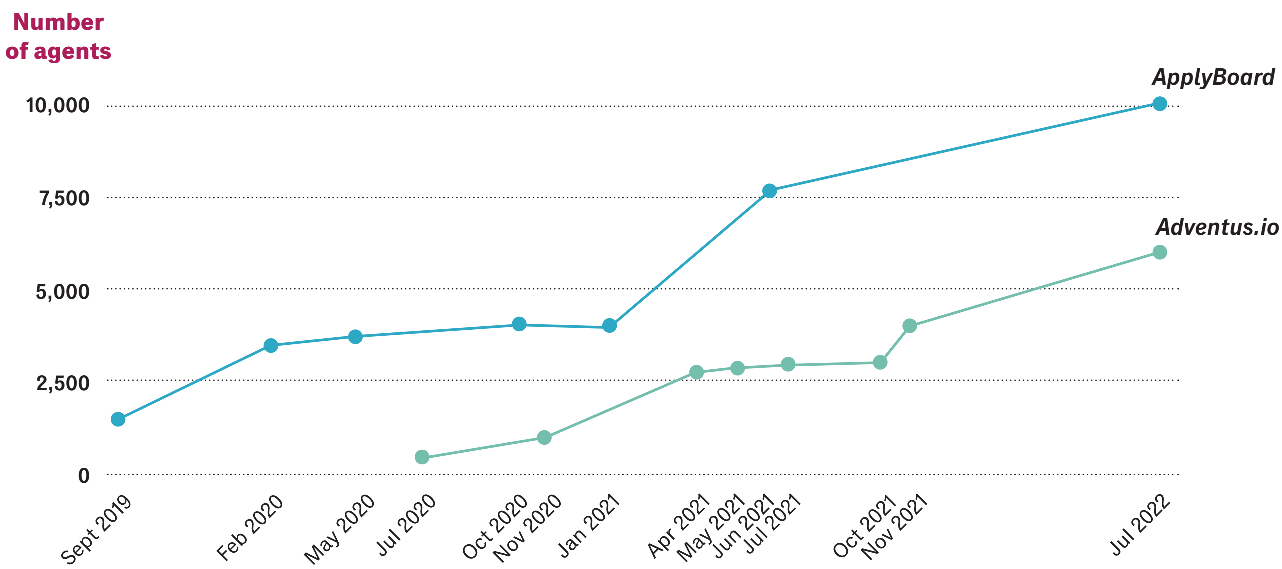
> "Each recruitment partner is vetted with our thorough vetting process. Typically, on average, we reject about 40% of recruitment partner applications and the vetting doesn't end once they sign up on the platform; it continues throughout the recruitment partner's time on the platform."

In most cases, any technology-enabled processes and monitoring on recruitment platforms are supported by people. Quality assurance at Adventus.io, for example, relies heavily on specialists whose prior careers were in the areas of immigration or admissions processing.

"Technology is great, but when it comes to looking at applications, the most powerful computer on the planet is the human brain," says Chris Price, senior vice president of partnerships for Adventus.io. He continues:

> "Before we lodge an admissions application with an institution, our admissions team assesses each application against entry requirements, vets every document for accuracy and completeness, and assesses for visa eligibility as well.

Growth of Agent Networks from 2019 to 2022



On average, we find that 30% of applications received are not ready to be lodged with an institution. This is all designed to ensure that institutions receive only high-quality applications that can result in admissions offers. In fact, 90% of applications generated through Adventus result in an offer from a partner institution."

Most recruitment platforms also operate under codes of conduct for registered agents, with interventions – including additional training or even sanctions – on the table in cases where an agent is the subject of a complaint or where other concerns indicate that good practice guidelines have been breached.

Pros and cons

Technology-enabled recruitment platforms represent a quick, efficient way for an institution to greatly extend its international recruitment network. At the same time, the model offers agents an expanded roster of institutions abroad without the need to establish individual agreements with each.

Without a doubt, there's something compelling about this approach – indeed, the rapid growth of such platforms has proven this out. The appeal can be especially apparent for institutions that are trying to enter more international markets or that have not yet established agent networks of their own. Similarly, recruitment platforms can be attractive to newer agencies or those that have not yet established direct relationships with educators in a particular country.

Nevertheless, critiques of the model persist. Concerns often relate to the transparency and accountability of agents, who, in their relationships with institutions on the platform, effectively operate as sub-agents. For the agent, working through a recruitment platform may mean they do not have an opportunity for a direct relationship with the educator.

There is, in effect, tension between the efficiency of the networked platform and the natural interests of the educator and the agent to be directly accountable to each other in their combined services to students. Along with the ability to scale up networks quickly, this tension is at the heart of the aggregator model, and it will likely continue to shape the development of these quickly growing platforms.

BEN WHITE / UNSPLASH

Study destinations facing a more competitive landscape

Students are applying to study abroad in larger numbers than ever before, and the competition for the best international talent is heating up.

This is especially true this year as we see the surging demand from a double cohort of students: those that would have gone abroad this year as well as those who deferred their studies during the pandemic. There is increased attention on continued growth in global student mobility through the rest of this decade and the diversification of international student populations. There were just over five million students enrolled in higher education abroad in 2019, and reliable forecasts project that the total will rise to as much as nine million by 2030.

That projection follows more than two decades of sustained growth, a period during which we have also seen some important shifts in destination competitiveness.

If we look back to the turn of the century, for example, we would have seen two fairly clear tiers of study destinations. In 2011, the United States was at the top of the table with an estimated 28% market share, followed by the United Kingdom, which at the time hosted about 12% of the world's international students. Those traditional leaders were followed in turn by a second group – including Germany, France, Australia, and Japan – each of which held less than 10% of the international student market at that time.

Fast forward to 2015–2019, and the competitive landscape among study destinations has shifted in some key ways. In short, the US, while still the world's leading host country for international students, lost share throughout the 2010s to Australia and Canada, both of which had become much more active recruiting countries. Other destinations, notably China and Russia, had also entered the list of leading destinations and, by about 2016, had each earned a 5–10% share of the global market.

Each popular destination country has its own unique benefits for students. The UK, and particularly Australia, are updating policies and providing new incentives to attract top students, whether it be faster visa processing times, post-graduate work opportunities, or priority programme processing. At the same time, each country needs to ensure that it's keeping a close eye on changing preferences and factors that are important to future students. There are increasing student concerns around safety, affordability, and the quality and capacity of higher education.

This is echoed in a recent survey of ApplyBoard recruitment partners, which found that post-study work opportunities, cost of study, and visa approval rates are the three most critical factors for students when choosing where to study. And we can expect that each of those will play an important role in the new top study destinations that will emerge by 2030.

For popular study abroad destinations to lead and remain popular, they must keep an eye out for the top factors that are important to international students.

Reimagining Career Services

Universities face pressure to show they provide students with the education, skills, and connections needed to secure good first jobs

ALEXANDER SUHORUCOV / PEXELS

Above all, international students expect their degree to lead them to a desirable job when they graduate. But research shows that most of them aren't turning to traditional career services departments at their institutions. This reality leaves educators with a choice: evolve their thinking about career services or risk the possibility that graduates will be disappointed and blame their alma matter for not doing enough to prepare them for the real world of work.

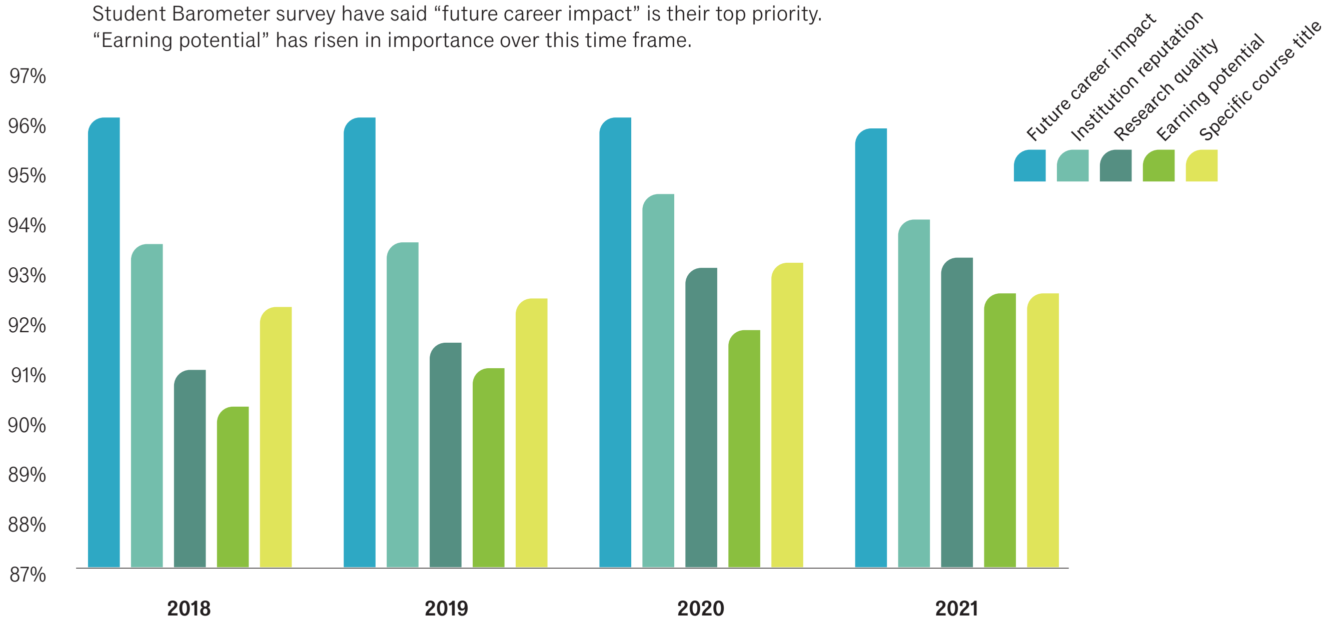
Increasingly, institutions are choosing the first option: a total rethink of career services.

The need to evolve

Tribal i-graduate's 2022 International Student Barometer (ISB) survey – based on feedback from 98,200 students in 12 countries – found that 96% of first-year students chose where to study based primarily on "future career impact." However, only 66% of final-year students said they were well prepared for their career.

Top Priorities for Prospective Students (2018–2021)

For the past four years, prospective students responding to i-graduate's International Student Barometer survey have said "future career impact" is their top priority. "Earning potential" has risen in importance over this time frame.



SOURCE: ISB 2022

The ISB Report authors write:

> "This clearly signals the importance of getting ... career guidance and support right; understanding it is more than 'just' a careers advice workshop in the last semester is key to this, and institutions should be integrating employability into the DNA of the entire learning experience."

First jobs matter

A 2021 Inside Higher Ed/College Pulse survey revealed that only 25% of students had used career services in the past 18 months despite the "vast majority" feeling concerned about getting a "meaningful first job" after graduation.

It is worth focusing on the word "meaningful" in the survey question. According to Burning Glass Technologies/Strada research, 43% of surveyed US graduates were underemployed – i.e., overqualified – in their first job. Of those graduates, two-thirds remained underemployed five years later. Michelle Weise, a senior executive at Strada Education Network, said, "[This] highlights just how important it is to position graduates well in that first job."

All of this has implications for recruitment. Graduates who end up disappointed with their career trajectory are also less likely to express satisfaction with their study experience and to recommend their alma matter.

Is the solution to devote more budget and staff to a standalone career services department? Not necessarily.

A 360-degree approach

A growing number of institutions around the world are now stretching the concept of career services across facilities, programmes, course requirements and composition, faculty training, and community and employer outreach.

For example, at the University of Florida, students taking a geographic information systems course had to research listings for their ideal job and then write a cover letter articulating why they would be perfect for the position. One student submitted her letter not only to her professor but also to her dream employer – the prestigious Smithsonian Institution. The result? An internship.

At Virginia Commonwealth University, students can obtain 18 credits towards graduation by pursuing a minor called Interdisciplinary Career Readiness Skills.

Creating space and atmosphere

According to *US News*, the University of Denver designed its 23,000 square-foot Burwell Center for Career Achievement "to end the dentist-office vibe of a typical career center: a sterile place students visited only for an appointment." Students can book the executive lounge for meetings with employers or use a variety of other rooms for networking and consultations with alumni. There's even a "career closet" that students can borrow clothing from for job interviews!

The building's architects say their design "encourages flow into and through the building, promoting chance encounters and serendipitous collaborations." It makes sense: important professional moments often occur simply because we're in the right place at the right time.

Atmosphere is also top-of-mind at Indiana University, where students attend "Discover" events – which Joe Lovejoy, director of the university's Walter Center for Career Achievement, says are "intentionally informal conversations about a career community." He explains:

> "You can come in your pajamas. There may be ten students sitting around the table with a pizza in the middle talking to an alum about a career in that area. Discover events provide opportunities for students to start interacting with alumni professionals in low stakes environments where there's not a job or internship on the table."

What do students want from their study experience?

A 2021 Inside Higher Ed/College Pulse survey asked students what they were looking for beyond being taught course content. Here are the results:

57% want professors to introduce them to people working in their field of interest.

54% are looking for advice from professors on choosing a career direction.

47% seek help landing their first internship or job.

Connecting with employers

Reimagined career services extend beyond the campus, providing students with far more than resume-writing and job-interview skills. Today's career services often include employer advisory boards and meaningful relationships with employers in the larger community.

At Point Loma Nazarene University, career preparation is woven into every academic major on campus, and the university has extensive linkages with employers. University provost Kerry Fulcher, who has overseen the transformation of career services at the university, says the focus on career prep impresses parents:

> "Simply knowing that PLNU has developed recruiting partnerships in which firms in San Diego's thriving biotech scene will give hiring consideration to our science graduates goes a long way toward reassuring parents that we see our responsibility as extending from core academics to starting careers."

Institutions that can credibly claim to offer a direct pathway to students' ideal careers have a powerful recruiting edge they can leverage through graduate employability stats on their website, videos featuring successful alumni, or any other communication with students.

Digital Language Learning Is Booming

The language learning industry is growing fast thanks to digital technologies

MARVIN MEYER / UNSPLASH

The pool of potential language learners is growing by leaps and bounds – and across the world. This surge is in large part because of the expansion and increasing sophistication of digital learning technologies during the COVID-19 pandemic. Untapped segments of the direct-to-consumer (D2C) market have been opened up thanks to these technologies – for example, students who cannot afford to travel to learn another language and students interested in pairing affordable online courses with the more costly but valuable experience of study abroad. Digital learning is:

- Driving the value of the global language training industry to new heights;
- Transforming the business models of many language providers that before the pandemic delivered only in-person instruction;
- Increasing the number of international students who can pursue post-secondary studies at foreign universities because they are proficient in the language of instruction.

Major growth ahead

A 2021 report from global research firm HolonIQ forecast that the D2C language training industry will nearly double in size from what it was in 2019 (US$61 billion) to reach US$115 billion in 2025. While the firm expects the offline/blended D2C segment to surpass 2019 revenues by 2025, it anticipates that the online segment will contribute far more growth. The forecast is that online language learning will nearly quadruple in size, growing from US$12 billion in 2019 to an estimated US$47 billion in 2025. Of that, $43 billion will be generated by English-language courses.

The chart on the right shows how quickly the digital learning mode is gaining share of the total D2C language learning market.

Gamification, AI, and virtual reality

Travel restrictions and the suspension of in-person classes spurred the immediate expansion of the digital language training industry in 2020; students were forced to study online if they wanted to study at all.

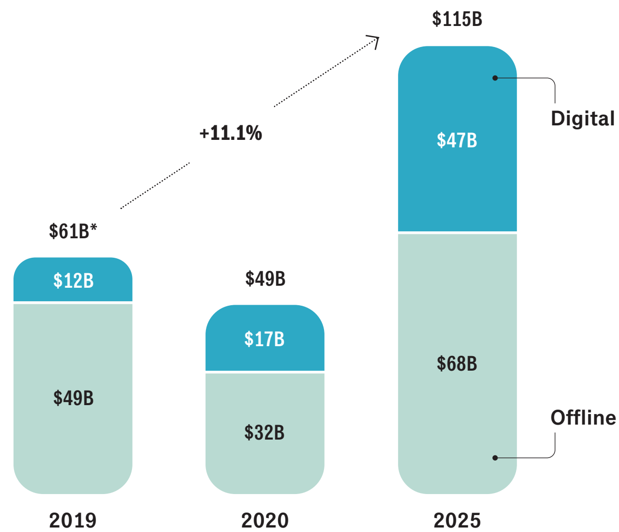
But since then, a host of factors have combined to attract tens of thousands of new students to digital learning:

- Vastly improved quality and student experience;
- Affordability;
- Convenience and flexibility (e.g., self-pacing, ability to learn anywhere on any device);
- Universities' greater acceptance of online test results.

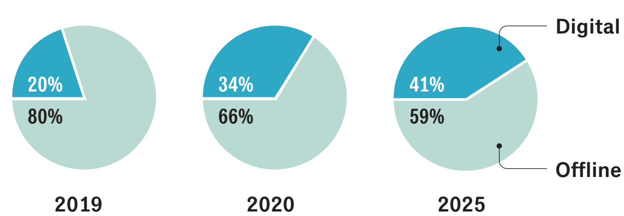
Gamification, artificial intelligence (AI), and virtual reality (VR) technologies are making digital language learning much more interesting, engaging, and personalised than it was previously. Students can:

- Earn badges or other rewards as they progress through levels and/or competitions, motivating them to keep going;

HolonIQ's Projection for Growth in the Global Direct-to-Consumer Language Learning Market, 2019–2025



Share of Market: Digital vs. Offline



*REVENUES IN USD

Did You Know?

- A growing number of online language tests are now being offered by established and emerging providers alike. Ireland now accepts the Duolingo English Test as a current minimum English-language standard for study visas.
- Students who travel to study a language represent less than 1% of all language learners worldwide.
- In 142 countries, English is a mandatory element of the national education curriculum.

Major players in digital language learning
Cambridge University Press & Assessment
Rosetta Stone Inc.
Sanako Corporation
Duolingo Inc.
Busuu Ltd.
McGraw-Hill Education Inc.
Houghton Mifflin Harcourt
Memrise Inc.
Transparent Language Inc.
New Oriental Education & Technology Group

- Immerse themselves in rich VR practice environments, such as a digital café where they can order from a menu, or a fully immersive 3D debate chamber;
- Ask AI chatbots questions when they encounter problems, reducing their likelihood of dropping out in frustration;
- Participate in live chats and forums and receive immediate feedback on quizzes and tests.

Meanwhile, AI data on student behaviours and progress (and barriers) allows platforms and/or instructors to introduce interventions that help students complete courses more happily and smoothly than they would without those aids.

What about in-person instruction?

There's a reason HolonIQ predicts that the offline/blended segment of the market will recover and grow in the next few years, albeit less robustly than the purely digital segment. All the digital

> "1 in 4 people on Earth are active language learners. That's more than all the students in the world enrolled from K–12 to higher education."
> —*HolonIQ*

JESHOOTS/ UNSPLASH

platforms in the world can't take away people's drive to travel to different places and to learn in those new environments – and there are thousands of students for whom the pandemic only reaffirmed a desire to study abroad.

According to the UNWTO World Tourism Barometer, international arrivals increased 182% in January–March of 2022 compared with the same period in 2021 – and students are, as always, a significant proportion of those arrivals.

Demand for in-person language learning is thus unlikely to disappear. A far more likely pattern is this:

- The proportion of students who travel to learn another language entirely in-person in another country will shrink.
- The proportion of students who blend online with offline will expand (e.g., taking online beginner courses in their own country before travelling to participate in more advanced, in-person language courses).

As we speak, ELT providers around the world are adjusting to this new reality. For example, English Australia's spring 2022 member survey found that 59% of Australian language schools plan to offer students a hybrid option, 53% plan to offer online courses as a supplement for students offshore before they take a face-to-face course, and 51% plan to generate revenue from standalone online courses. Only 8% do not plan to offer online courses after the pandemic.

OUTREACH

Make the most of virtual tours and edtech across the enrolment funnel

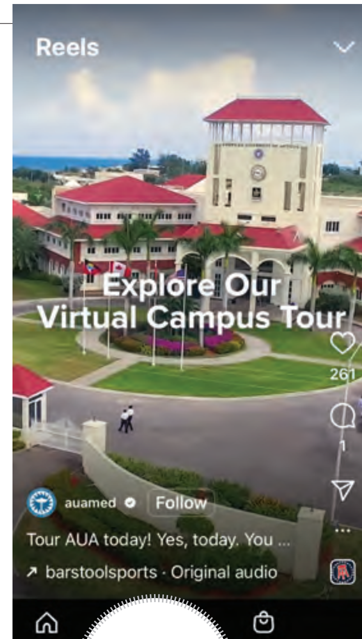
JOSHUA SONG / UNSPLASH

VIRTUAL TOURS: Powerful beyond the pandemic

The virtual tour for Rice University (Texas, US) features a dynamic map showing where on the campus the action in the video is taking place.

Virtual campus tours took on new urgency for educators during the locked-down months of the pandemic when international travel was impeded ... and they are here to stay. Their advantages over physical tours include:

- Zero travel costs for schools and prospective students' families;
- Students can watch digital tours whenever, and however many times, they want;
- Educators can insert calls to action, prompting students to engage and share on social media channels.



American University of Antigua medical school promotes its virtual tour on Instagram.

10 tips for virtual tour success

1 Pace it out

The tour should respect the way we process content online – i.e., in short bursts. Consider dividing your tour into different segments to provide breaks.

2 Be strategic

Identify the purpose of each segment, as well as the experience you want students to have and your desired outcome.

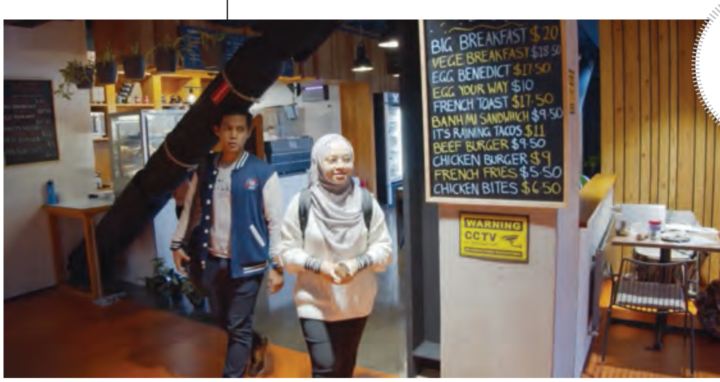
3 Follow the thread

Create a tour landing page so students can register with their email address – then send them reminders and follow-ups to keep in touch.

4 Use social media

Boost views of the tour on Facebook, Instagram, and other channels and coax viewers to comment and share.

> "A prospective student expects to be able to walk around campus, peek in the dining halls, sit in a lecture hall, and witness the student culture play out right before their eyes."
>
> *—Marketing agency ED*



The virtual tour for the University of Canterbury (Malaysian campus) provides a good look at daily life on campus.

5 Get creative

Make your tour more than a walk around the campus, and don't forget to feature students! Too many tours portray empty lecture halls or classrooms and focus excessively on architectural points of interest.

6

Leverage destination marketing

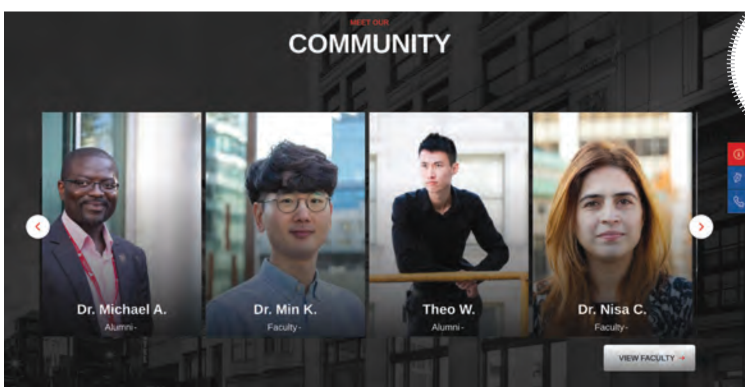
Layer in pictures and video of the campus and beautiful or exciting attractions nearby.

The University of Otago's virtual tour highlights the campus's setting: beautiful Dunedin, New Zealand.

7

Address top student considerations

Show your school's career counselling and support services, campus life, facilities, internships, etc.



9

Present different perspectives

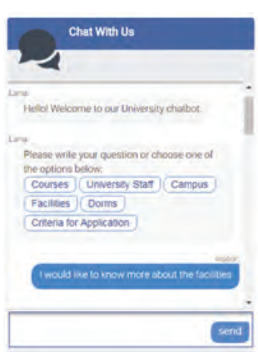
Feature faculty, staff, alumni, and employers.

University Canada West (British Columbia, Canada) shares faculty, student, and alumni profiles.

8

Answer students' questions in real time

A chatbot function can help to respond to students ASAP and move them from general interest in a school to a decision to apply.



10

Give it company

Include links to other key institutional information on the tour landing page (e.g., programme guides, visa information, student ambassador chats, and post-graduation outcomes).

EDTECH:
Boosting results across the enrolment funnel

The already massive education technology market is projected to grow considerably in the next few years. Estimated at US$245 billion in 2021, it is expected to exceed US$600 billion by 2027.

Pandemic-related travel restrictions and safety measures accelerated this expansion as educators quickly saw the need to invest in online channels to teach, learn, and engage with students and partners.

Now that most borders are open and face-to-face teaching is back, schools and universities have another reason to turn to edtech: interest in study abroad is surging, and edtech can help to manage overwhelming volumes of inquiries and applications.

Combining tech and human expertise

Artificial intelligence (AI) such as chatbots can help admissions departments provide quick, personalised responses to students – a key advantage given that many students expect answers to their questions within hours, or at most, a day or two.

But edtech should be applied judiciously – after all, we are talking about software, and no one wants a machine to answer every question or meet their every need. Corey Snow, director of education industry solutions for Salesforce, says, "The challenge is that personalisation at scale can only be achieved with technology. But technology only gets you so far. The best way to build meaningful and durable relationships is via one-to-one (or one-to-few) real-time human interactions."

Mr Snow's advice is to "provide the right tailored interaction on the right channel at the right time using the right form of engagement – all based upon what we know about the prospect." He expands:

> "For example, many might prefer to engage with a chatbot for routine inquiries: 'What is the current status of my application?' or 'What is the next step in my application process?' At the same time, a more open query along the lines of 'Why should I attend your institution?' may best be nurtured with a human conversation."

> "Digital is at its best when it does something or facilitates something human, or speeds something human up and makes it better for people."
> *—Mark Pettitt, founder, Edified*

ILLUSTRATION: SABELSKAYA / CREATIVE MARKET

How can edtech help?

Edtech can be employed at several different points of the student enrolment funnel – awareness, enquiries, applications, admissions, enrolments, and payment.

Awareness | **Enquiries** | **Applications**

Course search platforms

These websites help students to find information about study options. Examples include Hotcourses, Studyportals, Educations.com, and Studee.

Chatbots/AI/machine learning

These services process vast amounts of data to respond to student queries and match students to institutions and programmes.

Application portals

These platforms use a combination of AI and personal advising services to help students select and apply to institutions. Examples include DreamApply, iSchoolConnect, and ApplyBoard.

Peer-to-peer networking services

Services such as The Ambassador Platform and Unibuddy allow prospective students to connect directly with current students or alumni.

"AI enables us to be a lot more high-touch in recruitment activities. When you have lots of student demand and lots of students asking questions ... it's difficult to resource for that and I think AI allows institutions to provide better service."

—Tony Lee, chief vision officer, ICEF

Admissions | Enrolments | Payment

Customer relationship management systems (CRM)

These systems help to manage contacts with prospects, especially up to the point at which students apply. Examples include Salesforce Education Cloud, Microsoft Dynamics 365, and Hubspot.

International payment services

These services offer students lower costs and transparency, and provide institutions with efficient, accurate processing of overseas transfers. Examples include Flywire, NexPay, and Western Union GlobalPay.

Enrolment management software

Systems such as Ellucian, Blackbaud, and Edvisor support the evaluation of applications as well as the issuance of conditional offers, admission offers, and other key documents.

SPOTLIGHT

How expensive are top student cities?

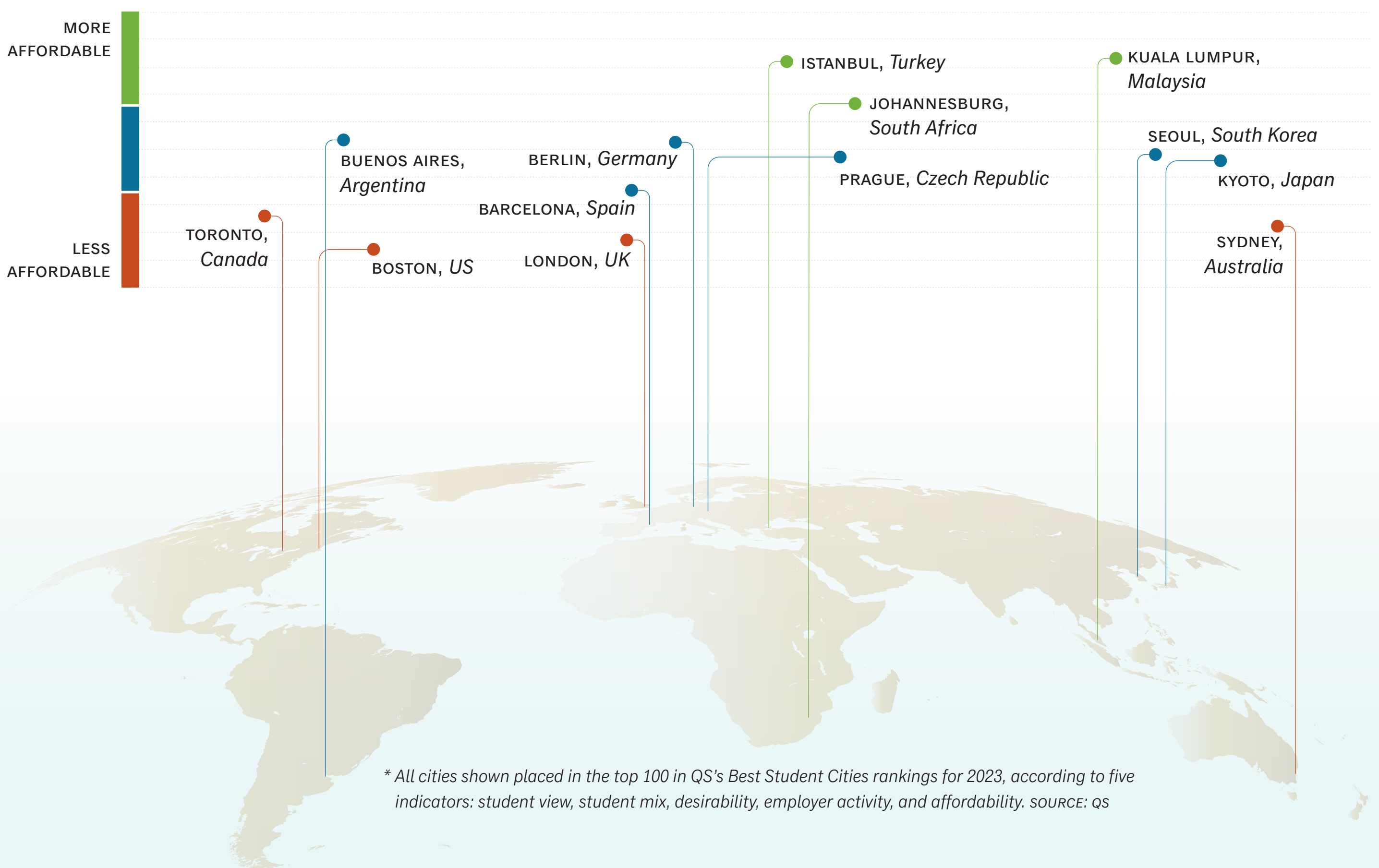
Above all else, say agents, students this year are prioritising the cost of studying and living when deciding where to study abroad – even above work or immigration opportunities. As a result, many students are becoming more interested in hearing about affordable countries and cities to study in outside of the leading English-speaking destinations.

When planning their study abroad, which are your students' most important decision-making factors?

SOURCE: ICEF AGENT VOICE, SPRING 2022

Comparing costs for students

Check out the relative affordability of these cities according to QS. The higher the dot representing each city, the more affordable it is.*

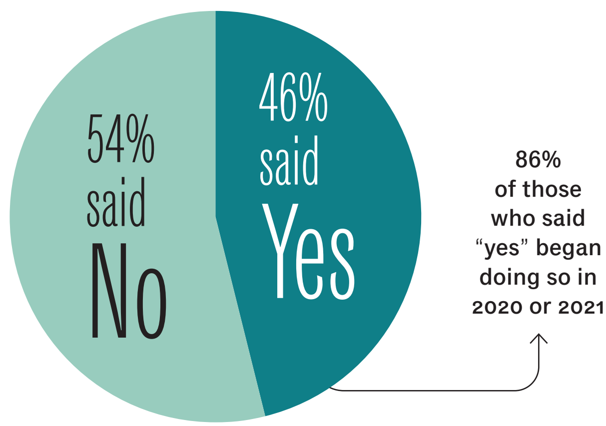


** All cities shown placed in the top 100 in QS's Best Student Cities rankings for 2023, according to five indicators: student view, student mix, desirability, employer activity, and affordability. SOURCE: QS*

AGENT VOICE

Are agents marketing online programmes?

Almost half of the agents responding to our ICEF Agent Voice survey in Spring 2022 are already recruiting for online study programmes. Of those agents, 86% began doing so in 2020 or 2021, highlighting the extent to which travel restrictions and study disruptions spurred the expansion and acceptance of digital delivery models.



47% of those who said "no" said they might market online programmes if ...

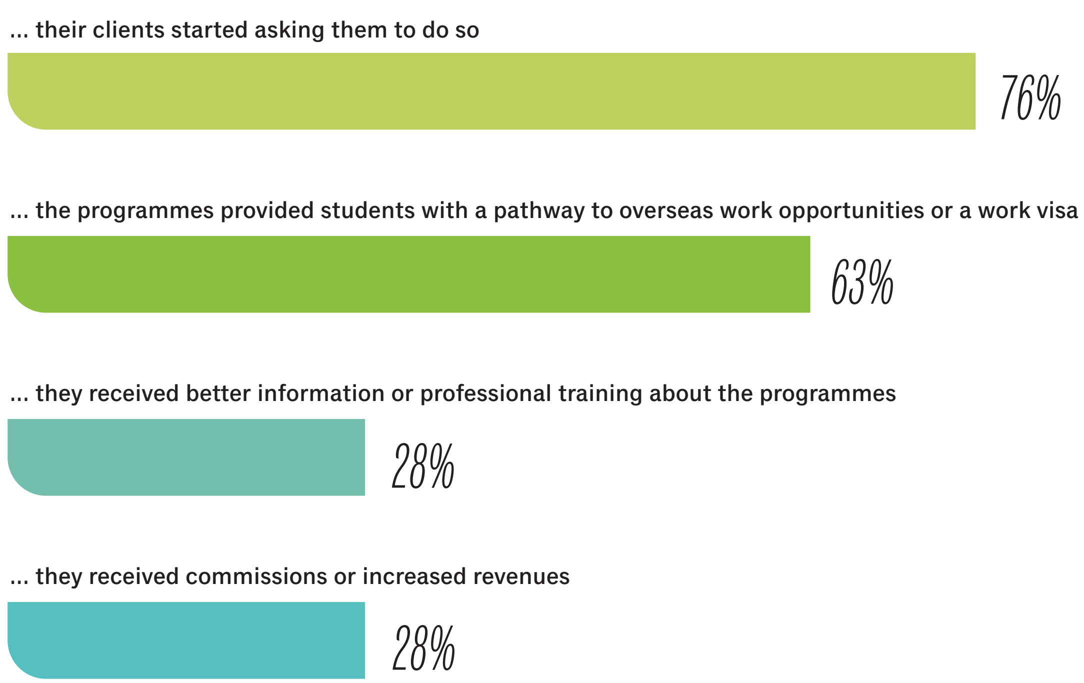


ILLUSTRATION: SERGE BLOCH; SURVEY SOURCE: ICEF AGENT VOICE SURVEY 2021

Want to better manage, track and streamline student information and payments?

Flywire's Agent Platform will enable you to:

- Centralize data in one place
- Securely send and track payments
- Easily send payment notifications
- Access fair-market exchange rates

flywire

Visit **edu.flywire.com** to see why Flywire is the **Trusted Choice** of millions of students and thousands of education institutions, agents and partners worldwide.


Developing
Global LEADERS
by providing ACADEMIC
Excellence
30 minutes from downtown Vancouver
Students from 45 different countries
Over 70 schools to choose from